

The background of the cover features a series of teal-colored wavy lines that create a sense of motion and depth. These lines are most prominent on the right side and bottom, curving and overlapping to form a dynamic, abstract pattern.

 **software** <sup>AG</sup>

# Getting Started with Alfabet

Alfabet Reference Manual

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Documentation Version Alfabet 10.11.0

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## CONVENTIONS USED IN THE DOCUMENTATION

Convention	Meaning
<b>Bold</b>	Used for all elements displayed in the Alfabet interface including, for example, menu items, tabs, buttons, dialog boxes, page view names, and commands.  Example: Click <b>Finish</b> when setup is completed.
<i>Italics</i>	Used for emphasis, titles of chapters and manuals.  this  Example: see the <i>Administration</i> reference manual.
Initial Capitals	Used for attribute or property values.  Example: The object state <code>Active</code> describes...
All Capitals	Keyboard keys  Example: CTRL+SHIFT
File > Open	Used for menu actions that are to be performed by the user.  Example: To exit an application, select File > Exit
< >	Variable user input  Example: Create a new user and enter <User Name>. (Replace < > with variable data.)
	This is a note providing additional information.
	This is a note providing procedural information.
	This is a note providing an example.
	This is a note providing warning information.

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## Chapter 1: Welcome to Alfabet

This reference manual provides basic information to help you understand the features available in Alfabet and carry out your tasks using those features. The first chapters explain basic issues including accessing and defining settings for your user interface as well as how to navigate the Alfabet interface.

The following few chapters address how to work the objects in Alfabet -- that is, the applications, components, projects, etc. that are the focus of your tasks. This section explains in detail basic concepts of capturing and editing your IT landscape in Alfabet and the different kinds of views, reports, and business graphics you might encounter.

The other chapters describe the many capabilities provided by Alfabet to support communication with other users about your enterprise's IT landscape. The following scenarios are examples of how Alfabet supports collaboration about the IT architecture in the enterprise:

### **Ask Colleagues to Provide Information about an Object via an Assignment:**

- An assignment allows you to define tasks that must be done in relation to a specific object in the IT landscape. You can then assign the task to the relevant user or break the task down into sub-assignments that cover specific aspects of the relevant object and send each sub-assignment to the user responsible for a specific aspect of an object. A notepad functionality allows a detailed dialog to occur between multiple users about a particular object or assignment, and reminders and automatically-generated emails allow you to keep track of targeted due dates.

### **Send a Colleague an Express View with Up-to-Date Data**

- An express view can be sent as a URL via email to a person inside or outside of your Alfabet community. When the person clicks the link, he/she will view the most current and up-to-date information in the Alfabet database.

### **Collaborate with Colleagues via Posts about Specific Objects and Views**

- The **My Collaborations** functionality supports a free-form exchange of information and ideas about objects or views in alfabet by members of the user community. The capability supports the exchange of user-generated content as is common in social bookmarking.

### **Carry Out Your Specific Data Input or Maintenance Tasks in a Distributed Workflow Process**

- The **My Workflows** and **My Workflow Activities** functionalities allow users to initiate and manage workflow processes. Typical scenarios for workflows include project approval processes and the introduction of new technologies.

### **Access Up-to-Date Information about the IT via an Executive Dashboard**

- The **Dashboards** functionality provides a portal-like environment made up of bookmarks that allows the business manager to easily access data via an executive dashboard in order to ascertain the health of the enterprise and make informed business decisions.

### **Keep Track of Data Input Requirements via Monitors**

- A monitor allows you to keep track of the activity, inactivity, or impending deadlines concerning objects in the Alfabet system. A set of users can be informed automatically per email when a defined monitor is triggered, thus allowing action to be taken in a timely manner.

The following information is available:

- [Welcome to Alfabet](#)
- [Getting Started With Your Alfabet Solution](#)
- [Navigating the Alfabet Interface](#)
- [Creating, Maintaining, and Evaluating Data in Alfabet](#)
- [Searching for Your Objects](#)
- [Managing Your Objects and Object Responsibilities](#)
- [Managing Your Calendar, Tasks, and Timesheets](#)
- [Creating, Managing, and Accessing Your Bookmarks](#)
- [Communicating and Collaborating with Your Colleagues in Alfabet](#)
- [Sending and Receiving Assignments for Alfabet Objects](#)
- [Executing Workflows and Participating in Workflow Steps](#)
- [Keeping Track of Objects via Monitors](#)
- [Creating a Splash Screen As Your Start Page](#)
- [Designing, Sharing, and Viewing Analytics Dashboards](#)
- [Defining and Navigating with Your Corporate Frameworks](#)
- [Working with Storyboards](#)
- [Appendix: Configuration Tools and Functionalities for Alfabet](#)

## Chapter 2: Getting Started With Your Alfabet Solution

You can access Alfabet via your Web browser. Supported browsers are Microsoft® Internet Explorer®, Chrome, Firefox, Safari. Please refer to the *Technical Requirements* to find out which version numbers are currently supported and which browser settings are required.

Please note that you can use many of your browser's functionalities when working with Alfabet such the tabbing feature, printing, scroll bars, and the right-click and Shift+Click interactions to open a link in a new tab or window. Click your browsers Back button to navigate back to the previous page. A breadcrumbs trail is available to help you return to other pages in Alfabet that you have visited.



Please note the following:

- It is not possible to open Alfabet by means of a URL that has been copied and pasted into another browser tab if the user credentials of the user accessing Alfabet by means of the copied URL are different than those of the user logged in to Alfabet when the URL was copied. When attempting to log in with different user credentials, the session expired screen will be displayed and the user will have to relogin in to Alfabet. If the user logs in with the same credentials used when the URL was copied, the page view will be displayed. The user can navigate back in the browser history to a previous page view if that view has been created with the same user credentials as that used by the current user. If the user logs in with different user credentials, the user's start page will be displayed. The execution of bookmarks and hyperlinks in express view notifications as well as other notification emails generated in the context of Alfabet are not impacted.
- Surrogate symbols (for example, symbols of the range D800 to DFFF in Unicode notation) cannot be handled in Alfabet. If such symbols are introduced to the Alfabet database, the application may not work correctly. Symbols of this kind should never be introduced to the Alfabet database through any interaction with the user interface.

The following information is available:

- [Configuration of Your Alfabet Solution](#)
- [Logging In and Logging Out](#)
- [Changing the User Profile That You Are Logged In With](#)
- [Changing the Mandate That You Are Logged In With](#)
- [Defining the Language of the User Interface](#)
- [Changing Your Password](#)
- [Defining Your User Information](#)
- [Defining Your User Settings in Alfabet](#)
- [Understanding Access Permissions in Alfabet](#)
  - [Visibility of Objects in a Federated Architecture Using Mandates](#)
  - [Access Permissions via the User Profile](#)
  - [Permissions to Objects for Authorized Users](#)
  - [Permissions to Objects for Authorized User Groups](#)

- [Permissions to Objects for Deputies](#)
- [Permissions to Objects via Permission Rules](#)
- [Permissions to Objects Targeted by Discussions](#)
- [Permissions to Object's Targeted by Assignments](#)
- [Permissions to Objects Targeted by a Workflow Step](#)
- [Permissions to Objects Based on the Release Status](#)
- [Purpose of Responsible Organizations](#)
- [Purpose of Roles](#)
- [Barrier-Free Accessibility in Alfabet](#)
  - [General Information About Using Keyboard Shortcuts](#)
  - [Using Keyboard Shortcuts in the Start Page and Menu Bar](#)
  - [Using Keyboard Shortcuts in the Guide Page](#)
  - [Using Keyboard Shortcuts in Explorers](#)
  - [Using Keyboard Shortcuts in Object Profiles and Object Cockpits](#)
  - [Using Keyboard Shortcuts in Page Views](#)
  - [Using Keyboard Shortcuts in Editors, Wizards and Filters](#)
  - [Using Keyboard Shortcuts in the Object Selector and Person Selector](#)
  - [Using Keyboard Shortcuts in the Bookmark Desktop Functionality](#)
  - [Using Keyboard Shortcuts in the Search Functionalities](#)
- [Viewing Your Enterprise's Broadcast Messages](#)
- [Using the Help in Alfabet](#)
  - [Using the AlfaBot Capability](#)
  - [Using the Automated Help Assistant](#)
  - [Using the Context-Sensitive Help](#)
  - [Using the Help Available for Editor Fields and Filter Fields](#)
- [Requesting User Assistance for a View in the User Interface](#)
- [Reporting Issues about Your Alfabet Product](#)
- [Using the Showcase Database](#)
  - [Example Reports in the Showcase Database](#)

## Configuration of Your Alfabet Solution

Alfabet is a highly modular, scalable, and configurable software. As a result of this high degree of configurability, what you see in your Alfabet interface may differ from the documentation of the standard Alfabet interface.



Your Alfabet solution environment is largely configured by your solution designer using the configuration tool Alfabet Expand. For more information about configuration of the Alfabet solution, see the reference manual *Configuring Alfabet with Alfabet Expand*.

The following aspects may influence the user interface that you see:

- **Your Enterprise's Alfabet Product:** The functionalities available in your Alfabet product depends on the capability packages that your company has purchased. Please note that the Alfabet documentation describes all available functionalities.
- **Configuration of Your User Profile:** The user profile you log in with will determine the functionalities you have access to as well as your access permissions to the object classes and their views in Alfabet. The user profile specifies the Alfabet functionalities available to a user, the visibility and editability of object classes and their object class attributes, as well as the availability of associated capabilities including, for example, wizards and workflows.
- **Naming of Functionalities:** Your enterprise may choose to change the captions of functionalities in order to emphasize specific processes or tasks important to the user community. If this is the case, the names of functionalities that you see may deviate from the standard described here.
- **Hidden Classes:** Object classes and object class properties may be excluded from some user profiles. If an object class is hidden, all related views will be removed from Alfabet. For example, if the object class Business Function is excluded for a specific profile, the *Business Services Page View* for an application, which is dependent on the class Business Function, will also be removed from your interface.
- **Customized Editors:** Your enterprise may require that customer-specific data is captured for an object class. In this case, additional tabs will be added to the standard class editor. Custom tabs in editors are not included in the standard Help provided with Alfabet.
- **Table Columns:** A user with Read/Write access permissions to an object may hide information about the object displayed in the object's page views. For example, the user may choose to hide specific attributes for an object by hiding the table column in the page view. Likewise, the user may add other standard or custom attributes to the view. The captions of the table columns may also display different captions if the solution designer has configured non-standard captions for the attributes. Whether it is possible to define the visibility of table columns will depend on the configuration of the server alias by your system administrator. For more information, see the section *Configuration Attributes for the Alfabet Components* in the reference manual *System Administration*.

## Logging In and Logging Out

To login to Alfabet, you must have a user name, password, and user profile assigned to you. This is typically done by your user administrator.

In most enterprises, Alfabet is typically accessed via the configuration of Windows Sign On. In this case, when you open your Alfabet solution in a browser, you will immediately see the Alfabet interface and do not

need to enter your user name and password in the login screen. The default user profile and default language specified by your solution designer will be displayed the first time you login as well as when users access the Alfabet solution via an external access mechanism such as express views.

If Windows Sign On is not configured for your company, enter your user name in the **User Name** field and your password in the **Password** field and click **Log In**. The user name that you log in with will be displayed below the **Log In** button. The first time you log in, you will see the functionalities associated with your default user profile. If a default user profile has not yet been defined in your user settings, you must select the user profile with which you want to access the Alfabet solution.



The Alfabet Web Application may be configured to provide an **I forgot my password** link in the login screen. If you click the link, the user password will be automatically reset and the **Regenerate Password** function will be invoked. You will receive two emails. One email will provide your user name and a link to a first login screen, and a second email will include the first login password. Upon the first login, you will be prompted to change the password. The functionality is only available for users that are logging in via standard login with the user name and password managed directly in the Alfabet database.

The language will be displayed in the default language specified by your solution designer.



Please be aware however that the language settings for your browser will override the language settings in your Alfabet solution.

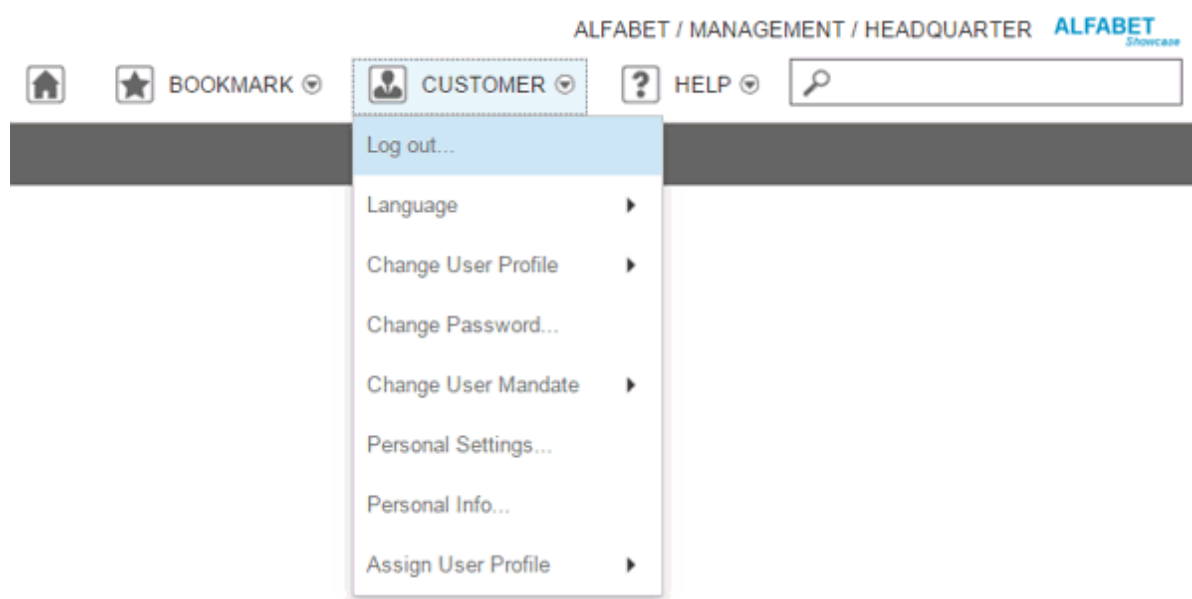
After your initial login, Alfabet will open using the user profile and interface language that you were last logged in with. Your user name will be displayed on the user button in the upper-right corner of the user interface. Above the **<Alfabet User Name>** button and **Help** button, you will see the server alias that you are currently connected with, the user profile and mandate that you are currently logged in with, and the current local time. The date format is determined by the configuration of your cultures.

It is possible to work with Alfabet in multiple browser tabs. If you log into Alfabet and display Alfabet in multiple browser tabs on the same browser platform, the same session ID will be used for each tab. When you log out from one instance of Alfabet in a browser tab and attempt to continue working with Alfabet in another browser tab, the session ID will no longer be available and a message will be displayed stating that the session has expired.



For more information regarding supported browsers, see *Technical Requirements*. Please note that the Alfabet Expand user interface freezes when the user executes the **Duplicate** function available when right-clicking the browser tab in Google Chrome®. This can be addressed by refreshing the newly created browser tab.

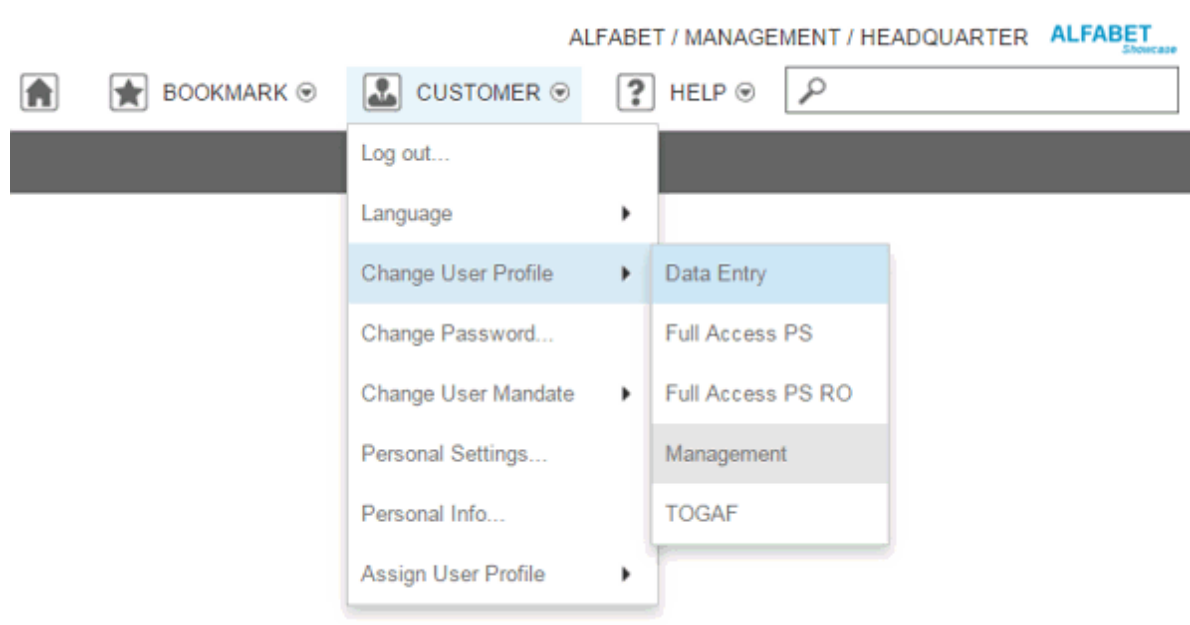
For more information about changing your user profile and interface language, see the sections [Changing the User Profile That You Are Logged In With](#) and [Defining the Language of the User Interface](#). For more information about configuring your user settings, see the section [Defining Your User Settings in Alfabet](#).



To end your session, click the **<Alfabet User Name>** menu in the top right corner and select **Log out** in the drop-down menu. Your session will end and the log in dialog will be displayed. If you opened multiple tabs to work with Alfabet within the session, the log out action will end the session for all tabs. When you login in to Alfabet again, the last user profile that you were logged in as well as the last language setting will be used to render the interface. The user profile and language setting can be changed in the **<Alfabet User Name>** menu as needed.

## Changing the User Profile That You Are Logged In With

A user profile describes the functional scope that is available to users. Typically, the majority of users will have only one user profile assigned. Yet certain users may possess several user profiles that correspond to their responsibilities in the enterprise. If more than one user profile is assigned to you, the default user profile defined by your solution designer will be used the first time you login to Alfabet. Therefore, the first time you log in, you will see the functionalities associated with your default user profile and the language will be displayed in the default language specified by your solution designer. After your initial login, Alfabet will open using the user profile and interface language that you were last logged in with.



Above the **<Alfabet User Name>** button and **Help** button, you will see the name of the user profile and mandate that you are currently logged in with, the server alias that you are currently connected with, and the current local time. To switch to another user profile assigned to you, click the **<Alfabet User Name>** > **Change User Profile** in the upper-right corner of the interface. In the drop-down menu, select a user profile from the list of user profiles assigned to you. The functionalities valid for the user profile selected will be displayed.

The *Attached User Profiles Page View* available in the **Personal Info** functionality displays all user profiles assigned to your user name.



For an overview of the implementation of permission concepts in Alfabet, see the section [Understanding Access Permissions in Alfabet](#). Please note that the **Default User Profile** attribute in your user settings determines the default user profile used when accessing Alfabet via external access such as an express view. For more information about defining the default user profile in your user settings, see the section [Defining Your User Settings in Alfabet](#).

## Changing the Mandate That You Are Logged In With

Some enterprises have a federated architecture. If this is the case in your enterprise, then the concept of mandates may be implemented to control the visibility of objects in Alfabet.

A mandate is a means to organize and structure the federated architecture of a holding company. The assignment of mandates to objects allows the holding company to structure the objects in the enterprise architecture in order to regulate visibility to objects across some or all subsidiaries. Only users explicitly assigned to a mandate will see objects with that mandate definition. An object that has not been assigned to a mandate is considered not to be owned by a mandate and is thus visible throughout the holding company to users with relevant access permissions.

The use of mandates in the Alfabet solution is optional. If mandates are implemented in an enterprise, the visibility of an object with a mandate assignment will take precedence over other concepts of access permissions in Alfabet. For example, an authorized user of an object must be assigned the relevant mandate to access the object that he/she is the owner of.



Within the context of mandates, the conventional rules governing access permissions apply. Thus, a user assigned to a mandate will only have Read/Write access permission to the objects made visible by the mandate if he/she has authorized access to the object as an authorized user, deputy, member of an authorized user group or discussion group or via rule-based access permissions, workflow contributor or assignee of an assignment.

If you are assigned a mandate, the interface will automatically open with that mandate applied. If multiple mandates have been assigned to you, the interface will open per default with the first mandate selected by your user administrator in the **Mandates** tab of the **User** editor. You may only be logged in with one mandate at a time.

Above the **<Alfabet User Name>** button and **Help** button, you will see the name of the mandate and user profile that you are currently logged in with, the server alias that you are currently connected with, and the current local time. To switch to another mandate, click **<Alfabet User Name>** > **Change User Mandate** in the upper-right corner of the interface and click the relevant mandate. The start page will be displayed and the new mandate applied to the interface.



Please note that if only one mandate has been assigned to you, the **Change User Mandate** option will not be displayed in the **<Alfabet User Name>** menu. For more information about the assignment of mandates to a user, see the section *Assigning a Mandate to a User* in the reference manual *User and Solution Administration*. For general information about the implementation of the mandate capability, see the section [Visibility of Objects in a Federated Architecture Using Mandates](#).



Please note that mandates are not supported if you are working with ARIS - Alfabet Interoperability Interface.

## Defining the Language of the User Interface

When you first open the Alfabet interface, the primary language defined by your enterprise will be automatically displayed. After your initial login, Alfabet will open using the interface language that you were last logged in with. Please note the following:

- Please be aware that the language settings for your browser may override the language settings in your Alfabet solution.
- The languages available in the **Language** menu are available based on the cultures configured for your enterprise and determine the language of the Alfabet interface and online Help as well as the formatting for dates and time. The primary culture is configured by your solution designer. For more information, see the section *Specifying the Cultures Relevant to Your Enterprise* in the chapter *Localization and Multi-Language Support for the Alfabet Interface* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- A bookmark will be displayed using the language that it was created with, even if you are logged in with a different language when you open the bookmark. You can change the language of the bookmarked view via the **<Alfabet User Name>** > **Language** option. For more information about creating a new bookmark, see the section [Creating, Managing, and Accessing Your Bookmarks](#).
- The language displayed for a user's email notifications is specified by a user administrator in the **Email Notification Language** attribute for the relevant user in the **User Administration**

functionality accessible via an administrative user profile. For more information, see the section *Defining and Managing Users* in the reference manual *User and Solution Administration*.

The **Language** sub-menu in the **<Alfabet User Name>** menu will not be displayed if only one culture has been specified in the solution configuration. If multiple cultures have been configured for your enterprise, you can change the language at any time during a user session by clicking **<Alfabet User Name> > Language** in the upper-right corner of the interface and selecting one of the languages supported by your enterprise.

The Alfabet interface is available in the following languages:

Language	Locale ID
Arabic (Saudi Arabia)	1025
German (Germany)	1031
English (United States)	1033
French (France)	1036
Portuguese (Brazil)	1046
Polish (Poland)	1045

If you are displaying the user interface in a secondary language (not the language associated with the primary culture defined by your enterprise), you will see most interface elements such as page view captions and editor field captions displayed in the selected secondary language. You can however translate some object data such as the name and description of your Alfabet objects to a secondary language in the respective object's editor. For more information about the object data translation capability, see the section [Multi-Language Support in Editors and Wizards](#).

## Changing Your Password

Passwords are assigned to a user in the **User Administration** functionality available via an administrative user profile. Depending on the configuration of your user definition, you may be required to change your password during the first login or if the password reaches its expiration date. You can subsequently change your password, as needed. The **Change Password** function is disabled for users logging in by means of an enterprise login (for example, by means of federated authentication or Windows sign-on).

To change your password, click **<Alfabet User Name> > Change Password** in the upper-right corner of the interface. In the **Change Password** editor, enter your current password in the **Current Password** field. In the **New Password** field, enter the new password. Reenter the new password in the **Confirm New Password** field and click **OK**.

For more information about the configuration of user passwords, see the section *Defining, Clearing, and Resetting a User's Password* in the reference manual *User and Solution Administration*.

## Defining Your User Information

The **Personal Info** option allows you to provide an email address, telephone number, Skype ID, and upload a picture of yourself. This information may be modified or updated by your user administrator. To access the **Personal Info** option, click the **<Alfabet User Name>** menu and select **Personal Info**. The **Personal Info** editor opens. Define the following as needed:

- **Email:** Enter your email address. The email address is necessary for notification emails sent in the context of various Alfabet functionalities including, for example, assignments and monitors.
- **Phone:** Enter a telephone number where you can be reached.
- **Skype ID:** Enter your Skype ID. A maximum of 128 characters is allowed. If interoperability with Skype is permissible for you, a Skype icon will be displayed next to your name in the **Attributes** section of object profiles/object cockpits and previews, allowing other users to contact you as the authorized user of an object should questions arise. Integration with Skype Business Service must be configured in order to implement Skype in the context of Alfabet.



The **Skype ID** and **Skype Domain** attributes will only be displayed in the **User** editor and in **Users Administration** functionality if interoperability with Skype for Business Server® is activated. For more information about using the Skype capability to communicate with your colleagues, see the section [Skyping with Your Colleagues](#). For more information about configuring integration with Skype, see the section *Configuring Interoperability with Skype for Business Server®* in the reference manual *API Integration with Third-Party Components*.

- **Skype Domain:** Enter your Skype domain to implement interoperability with Skype.
- **MS Teams User Name:** Enter your Microsoft Teams® user name to use the integration with Microsoft Teams for chatting about an object with colleagues both in Microsoft Teams and Alfabet synchronously.



Integration with Microsoft Teams is only available if your company configured the integration interface for data exchange with Microsoft Teams. In most cases companies will then use batch data processing to fill the **MS Teams User Name** field with the required information for all users.

- **Picture:** Click the arrow to upload a picture to Alfabet. The picture can be in GIF, PNG, or JPG formats and may not be larger than 16 KB. The picture will be displayed in the context of the **My Collaborations** functionality and in the main toolbar of the Alfabet user interface next to the **<UserName >** menu. For more information about the collaboration capability, see the section [Communicating with Your Colleagues via the Alfabet Internal Collaboration Functionality](#).

## Defining Your User Settings in Alfabet

User settings are the settings that you can define for your user profile. Default settings are typically defined by your enterprise, but you can define and save your user settings for the user profile that you are currently working with. Your user settings will be persistent and applied to future user sessions.



For more information about the default configuration of user settings on an enterprise-wide basis, see the section *Configuring Default User Settings for the User Community* in the reference manual *Configuring Alfabet with Alfabet Expand*.

To define your user settings:

- 1) In the toolbar, click **<Alfabet User Name> > User Settings**.
- 2) In the **Basic Settings** tab, define the following, as needed:
  - **Default User Profile:** Select the user profile that you want as your default user profile when you log in. The default user profile will be automatically displayed when you log in. The default user profile may also be used when accessing Alfabet by means of an express view. For more information, see the chapter [Sending and Receiving Express Views](#).
  - **Show Bookmarks As:** Specify the default view for your bookmarks displayed in the **Bookmarks Desktop** functionality. Select **Details** to display the bookmarks in a table structure. Select **Icons** to display the bookmarks as icons on the desktop.



For more information about working with bookmarks, see the section [Creating, Managing, and Accessing Your Bookmarks](#).

- **Show Retired Objects:** Select the checkbox if you want objects that have reached a retired object state to be displayed in search results as well as configured reports based on an alfabet query. Clear the checkbox if you do not want objects that have reached a retired object state to be displayed in search results and configured reports based on a query.



The setting for **Show Retired Objects** is ignored for standard views and configured reports based on native SQL. For configured reports based on a native SQL query, the report designer must specify the inclusion of retired objects in the native SQL query.

- **Show Dialog When Printing Datasets:** Select the checkbox if the user prompt **Please use the Print capability in your browser to print this view** should be displayed each time the user prints an Alfabet view. Clear the checkbox if the user prompt should be suppressed and not displayed each time the user prints an Alfabet view. Please note that if the **Add Filter Summary** option is available for a page view or configured report, the dialog will be displayed regardless of this setting so that the **Add Filter Summary** option can be selected for printing.
- **Show Empty Values in Object Profile:** Select the checkbox to display attributes that are not defined in the **Attributes** section of the object profile. If a value is not defined, the text **undefined** will be displayed. Clear the checkbox to hide attributes that are not defined in the **Attributes** section of the object profile.



If a property is editable in the user's wizard/editor for the associated object class/object class stereotype and the **Show Empty Values in Object Profile**

checkbox is cleared (= `False`), the setting will be ignored so that the attribute can be edited in the context of in-place editing in the object cockpit/object profile.

- Validate Information Flow Dates:** Specify whether information flows may or may not be created with invalid start and end dates. If the checkbox for the **Validate Information Flow Dates** attribute is selected (= `True`), then an error message will occur if you try to create an information flow for source and target objects that do not have intersecting dates and you will not be able to create the invalid information flow. If the checkbox for the **Validate Information Flow Dates** attribute is not selected (= `False`), then the information flow can be created. In this case, the start date of the information flow will be the earliest date defined for the source or target object and the end date will be the latest date defined for the source or target object. Invalid information flow dates will be highlighted red in the **Information Flows** page view and should be corrected via the **Align Dates** functionality. The **Validate Information Flow Dates** checkbox is selected (= `Yes`) per default and reflects the standard behavior of previous releases.
- Enable Splash Screen:** Select the checkbox if the **Edit Splash Screen** option should be available in the **Bookmark** menu. Clear the checkbox if the **Edit Splash Screen** option should not be available in the **Bookmark** menu. For more information about the splash screen capability, see the chapter [Creating a Splash Screen As Your Start Page](#).
- Enable Automated Help Assistant:** Select the checkbox if the automated assistants available to your user profile should be displayed. Clear the checkbox to disable all configured automated assistants that are available to you via your user profile. For more information about the help provided by automated assistants, see the section [Using the Automated Help Assistant](#).
- Capture Translations in Language of User Interface:** Select the checkbox if per default object data in editors and wizards shall be shown and edited in the current language of the user interface. Clear the checkbox if per default object data in editors and wizards shall be shown and edited in the primary language specified for the enterprise or for the object in the editor/wizard. This checkbox must be selected to capture data in a secondary language or statutory language. For more information about capturing data in a secondary language, see the section [Capturing Data in a Secondary Language](#) and [Capturing Data in a Statutory Language](#).
- Enable Feedback Bot:** Select the checkbox if the Feedback Bot available to your user profile should be displayed. The Feedback Bot allows users to provide feedback for a view, configured report, object cockpit, guide view, etc. For more information about the configuration of the Feedback Bot, see the section *Configuring the Feedback Bot*.
- Enable Check Feedback for View:** Select the checkbox to activate the **Feedback for Current View** capability. This is relevant for user profiles responsible for reviewing and responding to feedback provided via the Feedback Bot.



Feedback that has been provided for a view or report via the Feedback Bot can be displayed in the Alfabet user interface in a secondary view for those users responsible for reviewing and responding to the feedback. This allows the responsible users to navigate the Alfabet user interface and see the feedback for the relevant view where they currently are. A secondary view with the caption **Feedback for Current View** will be displayed with a link if feedback has been provided for the view, configured report, object cockpit, guide view, etc. Clicking the link will open the *Feedback Review Functionality* in a new browser tab which displays all feedback in detail for the view. To implement the **Feedback for Current View** capability, the **Enable Feedback for View** checkbox must be selected in the **User Profile**

editor for the relevant user profile and the **Enable Check Feedback for View** checkbox must be selected for the relevant user in the **User Settings** editor.




- **Enable User Interface to Poll Web Server:** Web polling allows the user interface to poll the server for the completion status of background processes for which completion shall be announced via an **Event Feedback** message. Select the **Enable User Interface to Poll Web Server** checkbox to enable Web polling in your user interface.



Additional configuration is required to implement the Web polling mechanism. For more information, see the section *Configuring the Web Polling Mechanism* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- **Enable Animations of Visualizations:** Select the checkbox if the graphics in standard views and configured reports displaying portfolios, Gantt charts, branching diagrams, sunray diagrams, circular roadmaps, etc. shall be built dynamically when the view is opened.
- **Execute Object Validation on Access:** Specify whether object validation rules should be executed and violations displayed in the object profile.

- Select **Default** if the execution of validation rules should be determined by the default settings specified by your enterprise.
- Select **No** if validation rules should not be executed or violations displayed.
- Select **Yes** if all validation rules should be executed and violations displayed in the object profile. Depending on your configuration, you may see the following icons:

Information , Warning ; or Error .




Please note that implementing the **Execute Object Validation on Access** capability may significantly impact performance since each upload to the database will trigger the execution of all validation rules. Object validation rules are post-conditions configured for wizard steps.

Due to the impact on performance, it is highly recommended that validation rules are instead configured in the context of a check entry configuration for an object cockpit. For more information about the configuration of check entries in object cockpits, see the section *Adding a Check Entry to the Object Cockpit* in the chapter *Configuring Object Views* in the reference manual *Configuring Alfabet with Alfabet Expand*. For more information about the configuration of post-conditions for wizard steps, see the section *Defining Pre-Conditions and Post-Conditions for a Wizard Step* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- **Include Filter Summary:** Specify if the filter settings defined in a view or configured report should be included when exporting to PPT, XLS or ZIP formats.
  - Select **Default** if the inclusion of the filter summary in exports should be determined by the default settings specified by your enterprise.
  - Select **Yes** if the filter settings defined in a view or configured report should be included when exporting to PPT, XLS or ZIP formats.
  - Select **No** if the filter settings defined in a view or configured report should not be included when exporting to a PPT, XLS or ZIP formats. This setting serves as the default setting for the **Include Filter Summary** option available in the **Export** menu in views and reports. You can change the option as needed.



The option **Include Filter Summary** is displayed in the **Export** menu even if filter settings are not available in the view.

- **Workflow View:** Specify the view that opens when the **Workflow Activities** link defined in a guide page is clicked or when the **Open Workflow Activities** link in an object profile is clicked.
  - Select **Default** if the view that opens should be determined by the default settings specified by your enterprise. For more information about the configuration of the default setting for the **Workflow View** attribute, see the section *Configuring Default User Settings for the User Community* in the reference manual *Configuring Alfabet with Alfabet Expand*.
  - Select **My Workflow Activities** view if this view should open.
  - Select **Workflow Activities Explorer** if this view should open. This view requires configuration to be implemented. Please contact your workflow designer to find out if the **Workflow Activities Explorer** has been configured for use. Go to the **Workflow Explorer Settings** tab to further configure workflow explorer options. For more information, see the chapter *Configuring Workflows* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- **Collaboration:** Specify whether the collaboration functionality should be enabled.
  - Select **Default** if the availability of the collaboration functionality should be determined by the default settings specified by your enterprise.
  - Select **Yes** if the collaboration functionality should be enabled. The **Show Collaboration Panel**  button will be displayed in object views and page views.
  - Select **No** if the collaboration functionality should not be enabled.
- **Max. Dataset Cell Text Length:** Specify the number of characters to display in columns in datasets as well as for the text displayed for event feedback messages. Enter -1 or leave the value empty to specify an unlimited number of characters, or enter an integer to limit the number of characters to display in columns. Any characters after the specified number will be truncated. You can point to the cell to display a tooltip with the complete text or access the full information about the object by using the preview functionality. Please note that it is recommended that you enter -1 in order to see the entire text available for event feedback messages.
- **MS PowerPoint Export Format:** Specify the slide size for export to Microsoft® PowerPoint®. The selected option corresponds to the slide size in the generated PowerPoint. Select `Default` if the slide size should be determined by the default settings specified by your enterprise. It is assumed Full HD resolution is supported. The following size formats are available: For more information about exporting to Microsoft® PowerPoint®, see the section [Exporting Datasets, Diagrams, Matrix Reports, and Gantt Charts as PPT](#).
  - **PPT Widescreen 16:9:** 720 x 405 Points
  - **PPT Standard 4:3:** 720 x 540 Point
  - **PPT Widescreen x4:** 1440 x 810 Points. This format is equal to the slide size for current Microsoft® PowerPoint® export features.

- **Session Expiration Countdown:** Specify the number of seconds prior to the session timeout that the warning should be displayed about the timeout. The default value is 60. If the current session reaches the expiration of the timeout period, the view in the current session will no longer be displayed. Instead, a timeout image and message explaining that the session has timed out will be displayed. A message will be displayed on the screen warning the user that the session is about to expire and the amount of time remaining. The user can click the **Resume Session** button and **Logout** button in the screen. After logging in again, the view for the last session will be displayed in the browser again.
  - **Max. Recently Visited Objects:** Specify how many objects shall be displayed in the *Object Usage Tracking Page View*. A general maximum of 99 is applied.
  - **Max. Recently Visited Reports:** Specify how many configured reports shall be displayed in the *Configured Reports Usage Tracking Page View*. A general maximum of 50 is applied.
  - **Number of History Days to Check Recent Reports:** Specify how many days shall be used to determine the values in the *Configured Reports Usage Tracking Page View* and *Object Usage Tracking Page View*. A general maximum of 100 days is applied per default.
- 3) In the **Workflow Activities Explorer Settings** tab, define the following as needed:
- **Workflow Activity Sort Order:** Specify how the workflow activities shall be structured in the **Workflow Activities Explorer** functionality.
  - **Group by Workflow Template.** Select the checkbox if the workflows should be grouped based on the workflow templates that they are based on.
  - **Move to Next Open Workflow Activity:** Select the checkbox if the first open workflow activity shall be automatically selected in the **Open Activities** folder of the **My Workflow Activities** explorer after a workflow activity is completed.




For more information about using the **Workflow Activities Explorer**, see the section [Performing and Tracking Your Workflow Steps in the Workflow Activities Explorer Functionality](#).

- 4) Click **OK** to save your changes or click **Cancel** to exit without saving.

## Understanding Access Permissions in Alfabet

Before you begin working with Alfabet, you should familiarize yourself with the concepts of visibility and editability of objects in order to understand why objects might not be visible in the interface vs. how permissions can enable and disable editability:

- **Mandate Definition Hiding Objects:** By means of a federated architecture, it is possible to hide individual objects in an object class while other objects of the same object class are displayed in the Alfabet interface. For more information, see the section [Visibility of Objects in a Federated Architecture Using Mandates](#)
- **Permissions Granting Read/Write Access and ReadOnly Access:** By means of user profiles, it is possible to define basic permissions regarding visibility and editability for objects in Alfabet. If the user profile grants ReadOnly access permissions, the user can only view objects when logging in to Alfabet. For any object that does not have Read/Write permission and thus cannot be edited, users will see the symbol  in its object profile. For an overview of the access permissions via user



profiles, see the section [Access Permissions via the User Profile](#). If the user profile grants Read/Write permission, the user can edit the objects if the following apply:

- If the user is the authorized user of the object. For more information, see the section [Permissions to Objects for Authorized Users](#).
- If the user is a member of an authorized user group defined for the object. For more information, see the section [Permissions to Objects for Authorized User Groups](#).
- If the user is a deputy of the object. For more information, see the section [Permissions to Objects for Deputies](#).
- If edit permissions are granted via a configured permission rule based on a query that finds the object or a configured default permission rule for the object class. For more information see the section [Permissions to Objects via Permission Rules](#).
- If the user is a member of a discussion group about the object. For more information, see the section [Permissions to Objects Targeted by Discussions](#).
- If the user is to process an assignment for the object. For more information, see the section [Permissions to Object's Targeted by Assignments](#).
- If the user is to perform a workflow step for the object. For more information, see the section [Permissions to Objects Targeted by a Workflow Step](#).
- If the release status of an object allows the object to be edited. For more information, see the section [Permissions to Objects Based on the Release Status](#).

Access permissions may be configured by a solution designer in the configuration tool Alfabet Expand or a user administrator in the **User Administration** functionality available via an administrative user profile. For a detailed overview of the sequence that access permission concepts are evaluated, see the section *Rules Governing Access Permissions* in the chapter *Configuring Access Permissions for Alfabet* in the reference manual *Configuring Alfabet with Alfabet Expand*.

The following information is available to describe these access permission concepts in more detail:

- [Visibility of Objects in a Federated Architecture Using Mandates](#)
- [Access Permissions via the User Profile](#)
- [Permissions to Objects for Authorized Users](#)
- [Permissions to Objects for Authorized User Groups](#)
- [Permissions to Objects for Deputies](#)
- [Permissions to Objects via Permission Rules](#)
- [Permissions to Objects Targeted by Discussions](#)
- [Permissions to Object's Targeted by Assignments](#)
- [Permissions to Objects Targeted by a Workflow Step](#)
- [Permissions to Objects Based on the Release Status](#)
- [Purpose of Responsible Organizations](#)
- [Purpose of Roles](#)

## Visibility of Objects in a Federated Architecture Using Mandates

Some enterprises have a federated architecture. If this is the case in your enterprise, then mandates may be implemented to control the visibility of Alfabet objects.

A mandate is a means to organize and structure the federated architecture of a holding company. The assignment of mandates to users and objects allows the holding company to structure the objects in the enterprise architecture and regulate visibility and accessibility to common objects across some or all subsidiaries. An object that has not been assigned to a mandate is considered not to be owned by a mandate and is thus visible throughout the holding company to users with relevant access permissions.

The use of mandates in the Alfabet solution is optional. If mandates are implemented in an enterprise, accessibility determined by the assignment of mandates take precedence over other concepts of access permissions in Alfabet. For example, an authorized user of an object must be assigned the relevant mandate to access the object that he/she is the authorized user of. Within the context of mandates, the conventional rules governing access permissions apply. Thus, a user assigned to a mandate can only access those objects owned by the mandate if he/she has authorized access to the object (because of a permission rule or as either an authorized user, authorized user, deputy, or member of an authorized user group or discussion group.)

Keep the following in mind when working with mandates:

- A user will typically have only one mandate associated with his/her user name. When the user is logged in with a mandate, he/she will have access only to those objects that are assigned to that mandate as well as to all objects that are not assigned to a mandate. In other words, the user will not see objects that have a different mandate assigned.
- Objects that do not have a mandate assigned are visible to anyone with relevant access permissions.
- If an object has a mandate assignment different than the user's mandate assignment, the user will still be able to view basic preview information as well as the reference information about the dependent objects associated with the object. However, any custom object class properties defined for the object are not visible in the object's preview or object profile to the user with the mandate different than the object's mandate.
- If objects at the root level in an explorer structure are controlled by a mandate, then they will only be visible to users logged in with that mandate. Any root object in the explorer structure that has a different mandate than the mandate that the user is logged in with will not be visible in the explorer. If the user has accessibility to an object at the root level in the explorer structure, then all subordinate objects will be displayed in the explorer even if the subordinate objects have a different mandate than the mandate assigned to the user. However, the user will only see the basic preview information for such objects if he/she attempts to select the object.
- Dependent objects that are not controlled by a mandate are accessible to anyone that has access permission to the ascendant object. For example, a business support is a dependent object associated with an application, organization/market product, or business process/domain. Therefore, the business support can be viewed and possibly edited by anyone with a mandate owning the associated application, organization/market product, or business process/domain. Likewise, an information flow can be viewed and possibly edited by anyone with a mandate owning the source or target application.
- When a user with a mandate creates an object, the object is automatically assigned to the user's mandate.



Please note that the assignment of mandates to information flows deviates from this rule. Mandates for information flows are implicitly derived from the source and target applications/components that they connect. Information flows are assigned to all mandates that the source and target objects are assigned to.

- When a user switches to another mandate, the access permission of the new mandate is immediately applied and the user is redirected to the start page.
- The mandate owning an object may change over the lifecycle of an object. For example, an application may be owned by one mandate during the pilot phase, but another mandate may become the owning mandate once the application is in a productive status.
- If a user receives an assignment associated with an object owned by a mandate different than the mandate that the user is logged in with, then, in order to view or edit the object, the user must re-login with the mandate that matches the mandate owning the object.
- The object classes for which mandates are available are configured by Software AG. For an overview of the object classes that support the mandate capability, see *Overview of Configurable Features for Object Classes* in the reference manual *Configuring Alfabet with Alfabet Expand – Appendix*.



The following steps are necessary in order to work with the mandate capability:

- Mandates must be created for your enterprise in either the configuration tool Alfabet Expand or the tool Alfabet Administrator.
- The mandate capability must be activated for each individual object class for which it is relevant in the configuration tool Alfabet Expand.
- The mandate capability as a whole must be activated in the configuration tool Alfabet Expand. For information about the configuration of mandates carried out in Alfabet Expand, see the section *Implementing the Mandate Capability for a Federated Architecture* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- Each user must be assigned a mandate. Mandates can be assigned to users in either the **User Management** functionality available via an administrative user profile or the tool Alfabet Administrator. For more information about assigning users to a mandate in the **User Management** functionality, see the section *Assigning a Mandate to a User* in the reference manual *User and Solution Administration*.
- All relevant objects must be assigned to a mandate in the *Mandates Page View* available for that object.

## Access Permissions via the User Profile

User profiles are the basis of user administration in Alfabet and serve as the entry point when accessing Alfabet. Every user must log in with a user profile that has been assigned to him/her by a user administrator. Therefore, all users accessing Alfabet must be assigned at least one user profile. However, users may possess multiple user profiles in accordance with their responsibilities in the user community and in the enterprise as a whole. A user can switch to another permissible user profile at any point during a user session.

A user profile specifies the Alfabet functionalities available to a user, the visibility and editability of object classes and object class attributes, as well as the availability of associated capabilities including, for example, wizards and workflows.

The user administrator will configure a user profile to grant either ReadOnly permission or Read/Write permission. If the user profile is configured to be a ReadOnly profile, the user can view information about all objects that are available in the scope of the functionalities assigned to the user profile. The user is not allowed to edit or delete objects.

If the user profile is configured to have Read/Write permissions, the editability of the object will depend on all other access permission concepts described here. Therefore, some objects may be displayed in ReadOnly mode while the user may be able to edit or delete other objects.

Access permissions are not evaluated at all if the user logs in with an administrative user profile. Users logged in with an administrative user profile can edit any object in the Alfabet database independent of the access permission concepts described here. The visibility of objects determined by the mandate settings will also apply if the user logs in with an administrative user profile.



Please note that changes made to user profiles via the **User Profiles Administration** functionality that can be accessed via the `Admin` user profile are not automatically updated to the user profile configuration in the configuration tool Alfabet Expand that is concurrently in use. The solution designer working in Alfabet Expand must either use the **Rescan Tree** functionality or close and reopen the database to view the updated user profiles.

## Permissions to Objects for Authorized Users

When an object is created, the user creating the object is automatically designated the authorized user. Every object can have at most one authorized user. However, it is also possible that no authorized user is defined for an object.

The authorized user has Read/Write permission to the object. After an object is created, the authorized user may be changed at any time. This change may be made by the authorized user as well as a user that is a member of an authorized user group or a deputy. The authorized user definition is made in the object's editor.



Access permissions for authorized users, deputies and authorized user groups are only valid if no conflicting permission rules have been configured. If permission rules are defined that do not include the authorized user as a permitted user, the authorized user may only edit the object in the context of the user session in which the object is being created. Once the user session ends, the authorized user will no longer be able to edit the object. For a detailed overview of the order of evaluation of access permission concepts, see the section *Rules Governing Access Permissions* in the chapter *Configuring Access Permissions for Alfabet* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Permissions to Objects for Authorized User Groups

An authorized user group is a group made up of users who automatically have Read/Write permissions to the object. If an authorized user group is assigned access permission to an object, all members of the group will have Read/Write permissions to the object. The definition of an authorized user group is optional. The authorized user group(s) assigned to an object can be changed at any time in the object's editor.

The solution designer can also configure rules for the inheritance and/or propagation of a user group's access permissions to all ascendant and/or descendant user groups. If propagation of permissions is configured, then all user groups in the user group hierarchy that are ascendant to a user group will have the same access permissions to that object. If inheritance is configured, then all user groups in the user group hierarchy that are descendant to a user group will have the same access permissions to that object. For more information, see the section *Configuring the Propagation/Inheritance of User Group Rights* in the chapter *Configuring Access Permissions for Alfabet* in the reference manual *Configuring Alfabet with Alfabet Expand*.



Access permissions for authorized users, deputies and authorized user groups are only valid if no conflicting permission rules have been configured. If permission rules are defined that do not include the authorized user as a permitted user, the authorized user may only edit the object in the context of the user session in which the object is being created. Once the user session ends, the authorized user will no longer be able to edit the object. For a detailed overview of the order of evaluation of access permission concepts, see the section *Rules Governing Access Permissions* in the chapter *Configuring Access Permissions for Alfabet* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Permissions to Objects for Deputies

The authorized user of an object can assign one or more deputies to an object in order to maintain the object when the authorized user is unable to. Each deputy has Read/Write permission to the object and thus can capture, edit, and delete the data for the object. The deputy is defined for an object in the *Authorized Deputies Page View* of the relevant object.



Access permissions for authorized users, deputies and authorized user groups are only valid if no conflicting permission rules have been configured. If permission rules are defined that do not include the authorized user as a permitted user, the authorized user may only edit the object in the context of the user session in which the object is being created. Once the user session ends, the authorized user will no longer be able to edit the object. For a detailed overview of the order of evaluation of access permission concepts, see the section *Rules Governing Access Permissions* in the chapter *Configuring Access Permissions for Alfabet* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Permissions to Objects via Permission Rules

Read/Write permission to objects can be granted by means of configured permission rules that are based on queries that finds the objects that a user may access.

The permission rules are configured by a solution designer in the configuration tool Alfabet Expand. If permission rules are defined that do not include the authorized user as a permitted user, the authorized user may only edit the object in the context of the user session in which the object is created. Once the user session ends, the authorized user will no longer be able to edit the object.

For more information about the implementation of rule-based access permissions in your enterprise, please contact your solution designer. For more information about the configuration of permission rules, see the chapter *Configuring Access Permissions for Alfabet* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Permissions to Objects Targeted by Discussions

Alfabet provides a discussion functionality that supports collaborative discussions about an object by configured discussion groups. If Read/Write permission has been configured for a discussion group, the members of that discussion group will also be able to access and edit the object that is under discussion.

The discussion capability is configured by a solution designer in the **Discussion Groups** functionality available via an administrative user profile. For more information, see the section *Defining Discussion Groups for Collaborative Discussions* in the reference manual *User and Solution Administration*.

## Permissions to Object's Targeted by Assignments

Alfabet provides an assignment capability that allows users to define tasks for objects and assign the tasks to users that are responsible to perform that task. An assignment is created for an object in the **Assignments** page view available for that object. For more information about working with assignments, see the chapter [Sending and Receiving Assignments for Alfabet Objects](#).

Any user that has been assigned an assignment associated with an object has Read/Write permission to that object for the period of the assignment.

## Permissions to Objects Targeted by a Workflow Step

A workflow is a collaborative process made up of workflow steps that are typically carried out by one or more users. A user that is currently responsible for a workflow step associated with an object has Read/Write permission to that object as long as the workflow step is not completed or the deadline to complete the workflow step has not been reached.

It may be that the workflow step has been configured so that the targeted object may only be edited by the user(s) responsible for the workflow step. In this case, other users including authorized users will have ReadOnly access permissions to the object for the period that the workflow step is active. This ensures that other users not involved in the current workflow step can not edit the data of the object that is being currently processed in the workflow step.

For more information about the workflow capability in Alfabet, see the section [Executing Workflows and Participating in Workflow Steps](#).

## Permissions to Objects Based on the Release Status

In Alfabet, a release status can be defined for many object classes including for example, applications, demands, and projects. A release status is a status defined for an object that describes its status of approval. Typical status values include Draft, Described, Reviewed, Approved, or Rejected. The release status is typically maintained for an object by the authorized user(s) in the object's editor.

The release status definitions can be configured for some object classes and their object class stereotypes. Some release statuses can be configured to be non-editable. For all objects with release statuses that are configured as non-editable, users will not be able to edit the attributes in the object's editor nor edit the object's relationships in the object's page views. Release status definitions are configured in Alfabet

Expand. For information about configuring release statuses, see the section *Configuring Release Status Definitions for Object Classes* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Purpose of Responsible Organizations

An object may also have a responsible organization defined for it. The responsible organization is the owner organization that governs important aspects of an object. Organizational responsibilities are for the purpose of documentation and analysis only and do not have any impact on the permissions associated with the object. To assign an organization responsibility for an object, see the *Organizational Responsibilities Page View* of an organization.

## Purpose of Roles

In Alfabet, you may attach roles to a user or an organization. A role describes a functional relationship that the user or organization has to an object (for example, as a controller, stakeholder, or manager). The definition of a role does not affect permission to the object in any way. Roles are for the purpose of documentation and analysis only and do not have any impact on the access permissions associated with the object.

It is possible to grant Read/Write permission to users with a specific role for the object by defining a permission rule. For more information, see the chapter *Configuring Access Permissions for Alfabet* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Barrier-Free Accessibility in Alfabet

Software AG provides a number of options to support accessibility to Alfabet functionality and content in conformance with established accessibility guidelines and requirements.

- **JAWS® for Windows® screen reader software:** Alfabet can be used in conjunction with JAWS® for Windows® software (v. 18) in order to support visually impaired users. Please note the following information about working with JAWS:
  - The screen reader will read out the login information displayed in the Alfabet user interface about the current user, user profile, and mandates when the start page is in focus if Alfabet is rendered in Google Chrome® and Microsoft Internet Explorer.
  - The screen reader will read out the text of the interface element that currently has the focus. This includes, for example, menus and menu options, data-entry fields, static texts, and buttons.
  - The screen reader will read out the ARIA label, control type, and help-related content such as page view descriptions or editor and filter field descriptions. Additionally, relevant keyboard shortcuts will also be read out loud by the screen reader. For example, if the keyboard shortcut SHIFT + F7 is used to select a block of text to ease navigation via tabbing, the screen reader will read aloud the keyboard shortcut SHIFT + F7.
  - The screen reader will read out if a field is a mandatory field.

- The texts for the interface elements will be read out in the language the user has selected in the Alfabet user interface if the same language has been selected in the JAWS® for Windows® software.
- **Tabbing navigation and keyboard shortcuts:** Users can use tabbing navigation to navigate through the interface. Keyboard shortcuts and key sequences allow the user to move the focus in the Alfabet interface and carry out tasks without using the mouse. Keyboard shortcuts are available in all functionalities in Alfabet and can be used to navigate via the menu bar of the Start page, explorers, object profiles, page views, editors, wizards, filters, and selectors.



Please note the following regarding the configuration of Alfabet for barrier-free accessibility:

- The implementation of JAWS® for Windows® software with Alfabet must be explicitly enabled for the relevant user profile in the configuration tool. The **Use WAI-ARIA** attribute should be set to `True` for the relevant user profile in order to implement the WAI ARIA (Web Accessibility Initiative – Accessible Rich Internet Applications) specification for barrier-free accessibility. If the **Use WAI-ARIA** attribute is set to `True` for a user profile, the following changes will be automatically implemented to support barrier-free accessibility:

- Conventional tabular datasets will be replaced by flat datasets with no hierarchical grouping in the table, no legend, and no cell coloring or icons in the cells. If a dataset is empty, the text " **No data provided** " will be read by the screen reader software. The **Export > MS File** and **MS PowerPoint** options will be available and the **Export > HTML** options removed. Please note that a special set of keyboard combinations are available for this dataset and are described in the section [Using Keyboard Shortcuts in Page Views](#) in the reference manual *Getting Started with Alfabet*.



Please note that editable cells with JAWS® for Windows® software will only be read by the JAWS® for Windows® software if Alfabet is rendered in Google Chrome®. This functionality is not available if Alfabet is rendered in Microsoft Internet Explorer.

- The auto-complete functionality that is typically available for edit search fields or combo-boxes in editors and filter fields will be automatically disabled.
- The pop-up calendar that is typically available to select dates will be replaced by a simple data entry field for date fields.
- The slide-in toolbar, secondary windows, and AlfaBot will not be available in the Alfabet user interface.
- Placeholder texts displayed in editor fields and filter fields will be automatically disabled.
- It is recommended that high contrast mode is specified for the browsers used by visually impaired users. Please note that the default high-contrast mode used in Microsoft Windows may display the background as pure black and white without support for inverse colors, thus causing any specified background colors to be not visible. Therefore, it is highly recommended that users render the Alfabet interface with Google Chrome® 37.0 or higher or Mozilla® Firefox® 24.0 or higher with their add-on extensions for high-contrast mode.
- In the case of Microsoft Internet Explorer, the use of the ALT key can trigger the activation of browser options, which may interfere with keyboard shortcuts in Alfabet. Therefore, it is



recommended that the command bar and status bar are disabled for users using keyboard shortcuts in some browsers such as Microsoft Internet Explorer.

- In order to support accessibility to the Alfabet interface for users that are required to use keyboard shortcuts, it is recommended that the visualization of the focus is configured according to the needs of users working with keyboard shortcut via the **AlfaGuiScheme** definition in the configuration tool Alfabet Expand. The options to specify the visualization of the focus as well as many other aspects of the interface is described in the section *Configuring GUI Scheme Definitions for the Alfabet Interface* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- It is recommended that access to the Alfabet functionalities is available via a menus rather than via guide pages. Additionally, the implementation of JAWS® for Windows® software with Alfabet must be explicitly enable for the relevant user profile. For details of the configuration options and requirements for user profiles requiring barrier-free accessibility to Alfabet, see the section *Configuring Barrier-Free User Profiles* in the reference manual *Configuring Alfabet with Alfabet Expand*.

The following information is available regarding keyboard shortcuts:

- [General Information About Using Keyboard Shortcuts](#)
- [Using Keyboard Shortcuts in the Start Page and Menu Bar](#)
- [Using Keyboard Shortcuts in the Guide Page](#)
- [Using Keyboard Shortcuts in Explorers](#)
- [Using Keyboard Shortcuts in Object Profiles and Object Cockpits](#)
- [Using Keyboard Shortcuts in Page Views](#)
- [Using Keyboard Shortcuts in Editors, Wizards and Filters](#)
- [Using Keyboard Shortcuts in the Object Selector and Person Selector](#)
- [Using Keyboard Shortcuts in the Bookmark Desktop Functionality](#)
- [Using Keyboard Shortcuts in the Search Functionalities](#)

## General Information About Using Keyboard Shortcuts

The keyboard shortcuts and key sequences listed below allow the user to move the focus in the Alfabet interface and carry out tasks without using the mouse. The following keyboard functionalities are generally available:

- Press the TAB key to move the focus to the next interface element.
- Press SHIFT + TAB to move the focus to the previous interface element.
- Press SHIFT + F7 to display the interface in blocks in order to ease navigation and reduce the number of TAB clicks required. After you press SHIFT + F7, the interface will be displayed as blocks, whereby each block is labelled with a letter (A, B, C, etc.). Press the TAB key to move the focus to the next block of interface elements or press the letter key (A, B, C, etc.) to move directly to that block. Press ENTER to select the relevant block for focus. If the keyboard shortcut SHIFT + F7 is used to select a

block of text to ease navigation via tabbing, the screen reader will read aloud the keyboard shortcut SHIFT + F7.

- Press ENTER to select the interface element that currently has the focus.



For example, the following key sequence means that first the TAB key is pressed and then the ENTER key is pressed.

- 1) TAB (to highlight option)
- 2) ENTER (to select)

- The Help available for the fields in an editor or wizard are typically available in tooltips as well as a Help page for the editor. To open the Help page, press the F1 key and to close the Help page press the ESC key.
- To go back to the previous view in the history of the views you have visited in the Alfabet interface, press ALT + LEFT ARROW.
- To go forward to the next view in the history of the views you have visited in the Alfabet interface, press ALT + RIGHT ARROW.
- To use your browser's Back button, use the keyboard shortcut relevant for the browser you are working with.



Please be aware that keyboard shortcuts are not supported in the following contexts:

- Keyboard shortcuts are not supported in the context of a business graphic. It is not possible, for example, to navigate to the object profile of an object displayed in a portfolio report, for example.
- Keyboard shortcuts are not supported in the context of the **Workflow Explorer** view. Instead, the **Workflow Activities** views should be implemented for user profiles requiring accessibility to Alfabet functionality via keyboard shortcuts. For more information about configuring workflows, see the chapter *Configuring Workflows* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- Keyboard shortcuts are not supported in the Alfabet Diagram Designer. Therefore, it is recommended that the **Open Diagram** button be hidden in all diagram views available in the user profiles requiring accessibility to Alfabet functionality via keyboard shortcuts. For more information about hiding buttons, see the section *Hiding Functionalities in a Page View or Configured Report* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Using Keyboard Shortcuts in the Start Page and Menu Bar




To Do This	Press
Move focus to the menu bar	TAB

To Do This	Press
Move focus to a button or menu in the menu bar	RIGHT ARROW/LEFT ARROW
Select a button and open the functionality	ENTER
Open a menu and select a menu item	<ol style="list-style-type: none"> <li>1) DOWN Arrow (to open menu)</li> <li>2) UP/DOWN ARROW (to highlight option)</li> <li>3) ENTER (to select)</li> </ol> <p>To leave the menu without selecting a menu item, click ESC.</p>

### Using Keyboard Shortcuts in the Guide Page

To Do This	Press
Move focus in the guide page	TAB
Open a hyperlink	ENTER

### Using Keyboard Shortcuts in Explorers

To Do This	Press
Select the <b>Show Explorer</b>  , <b>Hide Explorer</b>  , or <b>Refresh</b>  , buttons.	<ol style="list-style-type: none"> <li>1) TAB (to move focus to <b>Explorer Search</b> toolbar)</li> <li>2) RIGHT ARROW/LEFT ARROW (to move focus to button)</li> <li>3) SPACE or ENTER (to activate button)</li> </ol>
Use the <b>Explorer Search</b> functionality	<ol style="list-style-type: none"> <li>1) SPACE (to open <b>Explorer Search</b> functionality)</li> </ol>

To Do This	Press
	<ol style="list-style-type: none"> <li>2) Type search criteria in the criteria field, ENTER</li> <li>3) Repeat ENTER (to move to next/previous match)</li> </ol>
Move focus to the next explorer node	DOWN ARROW
Move focus to the previous explorer node	UP ARROW
Expand a selected explorer node	RIGHT ARROW
Collapse a selected explorer node	LEFT ARROW
Select the explorer node and display the object's object profile	SPACE

## Using Keyboard Shortcuts in Object Profiles and Object Cockpits

Keyboard shortcuts are supported in object profiles and object cockpits.

To Do This	Press
Move focus to the object profile toolbar	F7 + SHIFT
Move focus to a button or menu in the toolbar	RIGHT ARROW/LEFT ARROW or TAB
Select a button and open the functionality	ENTER
Open a menu and select a menu item	<ol style="list-style-type: none"> <li>1) Down Arrow (to open menu)</li> <li>2) UP/DOWN ARROW (to highlight option)</li> <li>3) ENTER (to select)</li> </ol>


To Do This	Press
Open a page view	<ol style="list-style-type: none"> <li>1) TAB (to move the focus to the page view)</li> <li>2) ENTER (to open the page view)</li> </ol>
Open the preview of a hyperlinked attribute	<ol style="list-style-type: none"> <li>1) TAB (to move the focus to the next hyperlink)</li> <li>2) ALT + I key (upper-case letter "I") or ALT + SPACE (to open the preview)</li> <li>3) TAB (to highlight button)</li> <li>4) UP/DOWN ARROW (to highlight option in drop-down menu)</li> <li>5) ENTER or SPACE (to select option)</li> <li>6) ESC to close the preview</li> </ol>
Scroll view up or down	<ol style="list-style-type: none"> <li>1) TAB (to move the focus on the view pane)</li> <li>2) UP ARROW/DOWN ARROW</li> </ol> <p>or</p> <p>PAGE UP/PAGE DOWN</p>

## Using Keyboard Shortcuts in Page Views

Please note the following restrictions regarding the use of keyboard shortcuts in page views:

- Standard matrix views (such as business support maps): All keyboard combinations described below are generally available in matrices. Please note however that it is not possible to create new business supports nor select an object in the matrix and navigate to its object profile using keyboard shortcuts.
- Diagrams: All keyboard combinations described below are generally available in diagrams. Please note however that it is not possible to design diagrams with the Alfabet Diagram Designer nor is it possible to select an object in the diagram and navigate to its object profile using keyboard shortcuts.
- Gantt charts: All keyboard combinations described below are generally available in Gantt charts. Please note however that it is not possible to select an object in the Gantt chart and navigate to its object profile using keyboard shortcuts.
- Business graphics (such as pie charts, line charts, and portfolios): Filters can be defined via keyboard shortcuts as well as scrolling. Otherwise, keyboard shortcuts are not supported in business graphics.
- Custom reports: All keyboard combinations described below are generally available in configured reports with tabular datasets. The use of keyboard shortcuts in the context of the Active Analysis capability is not supported. Scroll and zoom functions are available in configured reports displaying graphic formats such as treemap reports layered diagrams, etc. Please note however that it is not

possible to select an object in configured reports displaying graphic formats and navigate to its object profile using keyboard shortcuts.

- Please note that if you are using the JAWS® for Windows® software, a special dataset will automatically replace conventional tabular datasets. The dataset is a flat dataset with no hierarchical grouping in the table, no legends, and no cell coloring or icons in the cells. The floating toolbar denoting the pages of the dataset will also be hidden. If a dataset is empty, the text "No data provided" will be read by the screen reader software. Please note the following keyboard combinations for the dataset:
    - LEFT/RIGHT ARROW to move on a cell-by-cell basis through the dataset so that all data can be read out loud by the screen reader. The cell-by-cell navigation allow users to understand the table structure and the current column in focus.
    - UP/DOWN ARROW to move between rows.
    - ALT + N to navigate to the next editable cell.
    - ALT + P to navigate to the previous editable cell.
-  Please note that editable cells with JAWS® for Windows® software will only be read by the JAWS® for Windows® software if Alfabet is rendered in Google Chrome®. This functionality is not available if Alfabet is rendered in Microsoft Internet Explorer.
- N to navigate to the object profile for the object in a row that is selected.
  - D to navigate to the object profile for the object in a row that is in focus.

To Do This	Press
Move focus to a filter	TAB  For more information about how to define different types of filter fields via keyboard shortcuts, see the section <a href="#">Using Keyboard Shortcuts in Editors, Wizards and Filters</a> .
Move focus to a button or menu in the toolbar	RIGHT ARROW/LEFT ARROW
Select a button and open the functionality	ENTER or SPACE
Open a menu and select a menu item	<ol style="list-style-type: none"> <li>1) Down Arrow (to open menu)</li> <li>2) UP/DOWN ARROW (to highlight option)</li> <li>3) ENTER (to select)</li> </ol>

To Do This	Press
Change the sort order of the contents in the table	<ol style="list-style-type: none"> <li>1) TAB (to move the focus to the view pane)</li> <li>2) TAB (to move the focus to the column header that should be resequenced)</li> <li>3) carry out one of the following options to change the sequence of the data in the column: <ul style="list-style-type: none"> <li>• If JAWS® for Windows® software (v. 18) is enabled: CTRL + S</li> <li>• If JAWS® for Windows® software (v. 18) is not enabled: <ul style="list-style-type: none"> <li>• ENTER</li> <li>• SHIFT + ENTER</li> <li>• ALT + ENTER</li> </ul> </li> </ul> </li> </ol>
Select an object in the table	<ol style="list-style-type: none"> <li>1) TAB (to move the focus to the view pane)</li> <li>2) UP/DOWN ARROW (to select object)</li> <li>3) I key (upper-case letter "I") or SPACE (to highlight object)</li> </ol>
Open the preview for an object in the table	<ol style="list-style-type: none"> <li>1) UP/DOWN ARROW (to move the focus in dataset)</li> <li>2) I key (upper-case letter "I") or SPACE (to highlight object)</li> <li>3) ALT + I (to open the preview)</li> <li>4) TAB (to move the focus to the next attribute in the preview window)</li> <li>5) ESC (to exit the preview)</li> <li>6) ENTER (to navigate to the object profile from preview)</li> </ol>
Select multiple individual objects	<ol style="list-style-type: none"> <li>1) I key (upper-case letter "I") (to select first object)</li> <li>2) UP/DOWN ARROW (to next object)</li> <li>3) CTRL + I key (to select next object)</li> <li>4) Repeat steps 2-3 as needed</li> </ol>
Select multiple objects in a block	<ol style="list-style-type: none"> <li>1) CTRL + I key (upper-case letter "I") (to select first object in block)</li> <li>2) UP/DOWN ARROW (to final object in block)</li> <li>3) SHIFT + I or SHIFT + SPACE to highlight multiple rows in dataset simultaneously</li> </ol>
Scroll view up or down	<ol style="list-style-type: none"> <li>1) TAB (to move the focus to the view pane)</li> <li>2) UP ARROW/DOWN ARROW</li> </ol>

To Do This	Press
<b>For views with expandable and collapsible table sections:</b>	
Expand the entire dataset to a specific level	<ol style="list-style-type: none"> <li>1) TAB (to move the focus to the view pane)</li> <li>2) ALT + &lt;number of level to expand&gt;</li> </ol> <p>(for example, ALT + 3 expands the first three levels in the table)</p> <p>To collapse the dataset: ALT + (number of level to collapse to)</p> <p>Please note that the number must be typed via the typewriter keys and not the numeric keyboard.</p>
Expand a specific table section	<ol style="list-style-type: none"> <li>1) UP ARROW/DOWN ARROW to relevant row</li> <li>2) CTRL + RIGHT ARROW</li> </ol> <p>To collapse the table: CTRL + LEFT ARROW</p>
<b>For views with zoom capabilities:</b>	
Zoom view in or out	<ol style="list-style-type: none"> <li>1) TAB (to move the focus to the view pane)</li> <li>2) CTRL ++ (plus symbol to zoom in)</li> </ol> <p>or</p> <p>CTRL -- (minus symbol to zoom out)</p>
Move focus to legend	<ol style="list-style-type: none"> <li>1) TAB (to legend)</li> <li>2) TAB to select button in legend</li> <li>3) SPACE to activate the legend option</li> </ol>

## Using Keyboard Shortcuts in Editors, Wizards and Filters

Please note the following:




- The tab of the active editor or wizard step will be read out when WAI-ARIA is enabled.
- If objects are found via a filter functionality, the summary of results displayed above the results dataset will be read by the screen reader software if rendered with Google Chrome® 37.0 or higher.



- The Help available for the fields in an editor or wizard are typically available in tooltips as well as a Help page for the editor. To open the Help page, press the F1 key and to close the Help page press the ESC key.

The following table describes the keyboard shortcuts that can be used in editors and wizards as well as how to define the individual types of filter and editor fields.

To Do This	Press
<b>Standard and custom editors:</b>	
Open the editor/wizard	<ol style="list-style-type: none"> <li>1) TAB (to Edit button)</li> <li>2) ENTER</li> </ol>
Move focus to a field or another tab in the editor	<p>TAB to fields and tabs in the editor</p> <p>ENTER to activate the page of a selected tab</p> <p>Please note that you can only tab to active fields that can be edited. Fields that cannot be edited will be skipped.</p>
Save the definition	<ol style="list-style-type: none"> <li>1) TAB to <b>OK</b> button</li> <li>2) ENTER</li> </ol>
Close editor without saving changes	<ol style="list-style-type: none"> <li>1) TAB to <b>Cancel</b> button</li> <li>2) ENTER</li> </ol>
Select a value in a drop-down list	<ol style="list-style-type: none"> <li>1) DOWN ARROW (to open list)</li> <li>2) UP/DOWN ARROW (to select option)</li> <li>3) ENTER</li> </ol>
Open the Help link in the wizard header	<ol style="list-style-type: none"> <li>1) TAB to link</li> <li>2) ENTER</li> </ol>
<b>Filter and editor fields:</b>	
Define a date in a calendar field	<p>TAB to the date field and type a date directly in the field.</p> <p> The pop-up calendar that is typically available to select dates will be replaced by a simple data entry field for date fields if you are using the JAWS® for Windows® software.</p>

To Do This	Press
Define a reference to an object in a field with the object selector  icon	<ol style="list-style-type: none"> <li>1) TAB to the selector field and type the first letters of the name of the object to reference directly in the field.</li> <li>2) UP/DOWN ARROW (to select option)</li> <li>3) ENTER to confirm selection</li> </ol> <p>or</p> <ol style="list-style-type: none"> <li>1) TAB to the selector field</li> <li>2) CTRL + S (to open the selector)</li> <li>3) ESC (to close the selector)</li> <li>4) To use the selector, see the section <a href="#">Using Keyboard Shortcuts in the Object Selector and Person Selector</a>.</li> </ol> <p> The autocomplete functionality that is typically available when defining data entry fields with a search symbol will be automatically disabled if you are using the JAWS® for Windows® software.</p>
Define a drop-down field	<ol style="list-style-type: none"> <li>1) TAB to field</li> <li>2) DOWN ARROW to open drop-down list</li> <li>3) UP ARROW/DOWN ARROW to option in drop-down list</li> <li>4) ENTER (to confirm selection)</li> </ol>
Define a multi-selection field (multi-selection combo-box)	<ol style="list-style-type: none"> <li>1) TAB to field</li> <li>2) DOWN ARROW to open the multi-selection combo-box</li> <li>3) UP ARROW/DOWN ARROW to option</li> <li>4) SPACE to select/deselect option</li> <li>5) Repeat steps 2 and 3 to select all necessary values</li> <li>6) ENTER (to confirm selection)</li> </ol> <p>To activate the <b>Select All</b> button in the multi-selection combo-box: CTRL + A</p> <p>To activate the <b>Clear All</b> button in the multi-selection combo-box: CTRL + D</p> <p> Please note if you are working with the JAWS® for Windows® software, editable cells with multi-selection fields (multi-selection combo-boxes) will only be read by the screen reader if Alfabet is rendered in Chrome. This functionality is not available if Alfabet is rendered in Microsoft Internet Explorer.</p>
Define a radio button field	<ol style="list-style-type: none"> <li>1) TAB to radio button (focus will be on the default or currently defined value)</li> </ol>

To Do This	Press
	<ol style="list-style-type: none"> <li>2) UP ARROW/DOWN ARROW to radio button</li> <li>3) SPACE to select option</li> <li>4) TAB (to confirm selection and move to next interface element)</li> </ol>
Define a checkbox	<ol style="list-style-type: none"> <li>1) TAB to checkbox</li> <li>2) SPACE to select or deselect option</li> </ol>
Define a color selector	TAB to color selector field and enter the name of the color directly in the field.

**Editors with embedded datasets:**

(For example, the **Mass Update**, **Evaluation**, or **Business Case** editors)

Move focus to an object in the editor	<ol style="list-style-type: none"> <li>1) TAB (to move the focus to the view pane)</li> <li>2) UP ARROW/DOWN ARROW (to select object)</li> </ol>
Select the cell in which the indicator can be edited	RIGHT ARROW/LEFT ARROW (to select cell)
Define the indicator in a selected cell	<p>For a cell where a selection can be made by setting or clearing a checkmark (Boolean value): SPACE</p> <p>For a cell where a selection can be made in a drop-down list:</p> <ol style="list-style-type: none"> <li>1) SPACE</li> <li>2) UP ARROW/DOWN ARROW (to highlight option)</li> <li>3) ENTER</li> </ol>
Save the definition	TAB to <b>OK</b> button, ENTER

**Wizards:**

Navigate to link in header	<ol style="list-style-type: none"> <li>1) TAB (to link)</li> <li>2) ENTER</li> </ol>
Navigate back to previous wizard step	Use browser's Back button or the <b>Go To Step</b> field

To Do This	Press
Navigate to wizard steps via the <b>Go To Step</b> field	<ol style="list-style-type: none"> <li>1) TAB (to focus on field)</li> <li>2) ALT + DOWN ARROW (to open list)</li> <li>3) UP ARROW/DOWN ARROW (to select option)</li> <li>4) ENTER</li> </ol>
Move focus to <b>Back, Next, Reset, Exit</b> , etc. buttons	<ol style="list-style-type: none"> <li>1) TAB</li> <li>2) ENTER</li> </ol>

### Using Keyboard Shortcuts in the Object Selector and Person Selector

To Do This	Press
To open the selector	<ol style="list-style-type: none"> <li>1) TAB to the selector field</li> <li>2) CTRL + S (to open the selector)</li> </ol>
Move focus to a filter	<ol style="list-style-type: none"> <li>1) TAB</li> <li>2) Enter search criteria</li> <li>3) ENTER</li> </ol> <p>For more information about how to define different types of filter fields via keyboard shortcuts, see the section <a href="#">Using Keyboard Shortcuts in Editors, Wizards and Filters</a>.</p>
Select an object	<ol style="list-style-type: none"> <li>1) TAB (to move the focus to the view pane)</li> <li>2) UP ARROW/DOWN ARROW (to move to object)</li> <li>3) I key (upper-case letter "I") (to select object)</li> <li>4) TAB to move focus to the <b>OK</b> button</li> </ol>
Close selector	<ol style="list-style-type: none"> <li>1) TAB to <b>OK</b> or <b>Cancel</b> button</li> <li>2) ENTER</li> </ol>
Scroll dataset up or down	<ol style="list-style-type: none"> <li>1) TAB (to move the focus to the view pane)</li> <li>2) UP ARROW/DOWN ARROW</li> </ol>

## Using Keyboard Shortcuts in the Bookmark Desktop Functionality

Keyboard shortcuts can be used in the context of the **Bookmark Desktop** functionality. Please note the following:

- To access bookmarks in the **Bookmark Desktop**, the bookmarks must be displayed as a list in a table. The **All Bookmarks** tab will be activated. This can be defined in the **Bookmark Desktop** by selecting **View > Show as List**. Alternatively, the bookmarks can be displayed per default as a list. This is specified in the user settings by selecting the **Details** option in the **Show Bookmarks As** field in the **User Settings** editor. For more information, see the section [Defining Your User Settings in Alfabet](#).
- If the bookmarks are displayed as a list, all relevant keyboard shortcuts described for page views can be used. For more information, see the section [Using Keyboard Shortcuts in Page Views](#).

## Using Keyboard Shortcuts in the Search Functionalities

Keyboard shortcuts can be used in the context of the **Search** functionalities. Please note the following:

- In the **Full-Text Search** functionality, the checkbox **Show as Data Set** must be selected. TAB to the checkbox **Show as Data Set** and click the SPACE key to select the checkbox. If the search results are displayed as a list, all relevant keyboard shortcuts described for page views can be used. For more information, see the section [Using Keyboard Shortcuts in Page Views](#).
- In the **Simple Search** functionality, all relevant keyboard shortcuts described for page views can be used. For more information, see the section [Using Keyboard Shortcuts in Page Views](#). To select an object class in the **Search For** field:
  - 1) Tab (to move the focus to the **Search For** field)
  - 2) Enter the first letter of the object class to search for

If the object class displayed is not the correct class:

- 3) Tab (to return the focus to the **Search For** field)
- 4) DOWN ARROW (to display next object class)
- 5) Repeat steps 3 and 4 until the correct object class is displayed.

## Viewing Your Enterprise's Broadcast Messages

Your enterprise may configure one or more broadcast messages to be displayed to the user community with information such as when the system will be shut down for maintenance, etc. All broadcast messages will be displayed in a pop-up window in the lower-right corner of the Alfabet interface. If multiple broadcast messages have been configured, the number of available broadcast messages to view will be displayed in the pop-up window.

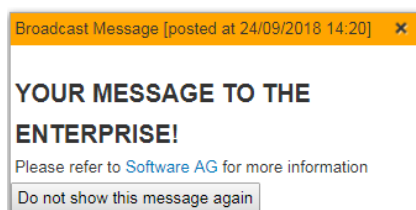


FIGURE: Example of a broadcast message

All broadcast messages will be displayed in a pop-up window in the lower-right corner of the Alfabet interface. If the text is excessively long, a vertical scrollbar will be added to the window. If multiple broadcast images have been configured, the number of available broadcast messages to view will be displayed in the pop-up window. You can click the X in the upper-right corner of the pop-up window to close the current message for the current user session and view the next one. The message can be closed for the current and future user sessions by clicking the **Do not show this message again** button.

## Using the Help in Alfabet

A number of capabilities are available provide information to help you understand how to perform your tasks using the standard functionalities provided by Alfabet as well as your enterprise's solution configuration.

The following information is available:

- [Using the AlfaBot Capability](#)
- [Using the Automated Help Assistant](#)
- [Using the Context-Sensitive Help](#)
- [Using the Help Available for Editor Fields and Filter Fields](#)

## Using the AlfaBot Capability

An AlfaBot capability is available that provides assistance via a textual chatbot to help Alfabet users in general tasks such as creating, editing and finding objects as well as navigating to standard page views and configured reports. Users can open the AlfaBot window, ask for help by typing in texts such as "Create an application" or "Edit TradeNet" or "Open report". The AlfaBot will respond either by asking for more information to service the request, providing a list of objects matching the input, or directly executing the action derived from the user input. For example, if you enter "Edit application" the AlfaBot might respond with "Provide me with the name of the application." Or if you enter "Navigate to report" the AlfaBot might respond with "Provide me with the name of the report." The following scenarios are supported by Alfabet:

- Create a new object (any class or class stereotype): The AlfaBot will open the editor or wizard for creating a new object.
- Edit/update an object (any class or class stereotype): The AlfaBot will open the editor or wizard for updating the object. Optionally, the wizard can be opened at a defined wizard step.
- Navigate to an object (any class or class stereotype): The AlfaBot will open the object view or object cockpit of the object.

- Navigate to a standard page view for an object (any class or stereotype): The AlfaBot will open the page view for the selected object.
- Navigate to a configured report: The AlfaBot will open the configured report. Navigation to the configured report may be based on the name of the report, keywords, or the base object.



User interaction in the AlfaBot window is based on natural language processing. A set of standard word patterns is available for the standard AlfaBot capability. The AlfaBot capability may be further configured to provide additional word patterns that are relevant for the enterprise's user community. The user can enter a simple phrase and the AlfaBot capability will search for given structures and keywords based on training phrases. The training phrases are analyzed initially by the third-party NLP processing tool Dialogflow™. Dialogflow is a third-party service that is not embedded in Alfabet. A license must be purchased by the customer directly from Google in order to be able to use the AlfaBot capability. For details about the configuration of the AlfaBot capability, see the section *Configuring the AlfaBot Capability* in the reference manual *User and Solution Administration*. For more information about configuring the appearance of the AlfaBot in the slide-in toolbar, see the section *Configuring GUI Scheme Definitions for the Alfabet Interface* in the reference manual *Configuring Alfabet with Alfabet Expand*.

To access the AlfaBot:

- 1) Click the AlfaBot notch in the slide-in toolbar and click the AlfaBot icon to open the AlfaBot window.
- 2) In the AlfaBot window, type in text. Enter questions such as "Create an application" or "Navigate to TradeNet".
- 3) Hit the ENTER key to enter the question. The AlfaBot will return a maximum of 13 matches. If more than 13 matches are possible, you should refine the question.
- 4) Based on how the AlfaBot responds, either select the result that matches your query or refine your query as needed. Hit the ENTER key after each selection of text entry. You may copy text in the AlfaBot window to formulate a refined query.

## Using the Automated Help Assistant

Training users how to process a specific use case or to carry out their tasks in Alfabet can be challenging. The automated help assistant capability supports the enterprise in training efforts as well as disseminating relevant information to occasional users about the Alfabet functionalities that they use. The automated help assistant capability allows the enterprise to provide a URL targeting an HTML document, video, animation, PowerPoint file, etc. with explanations about methodology, use cases, procedural instructions, and complex processes when working with wizards with many wizard steps, for example. The automated help assistant can be configured for any user profile and displayed on the Home page whether that is a guide view/guide page, splash screen, or storyboard. Automated help assistants can also be configured for a custom wizard, custom object profile and object cockpit, standard business function/custom explorer, standard page view, or configured report. If the standard page view or configured report is embedded in a wizard step, the automated help assistant will also be available for that wizard step.

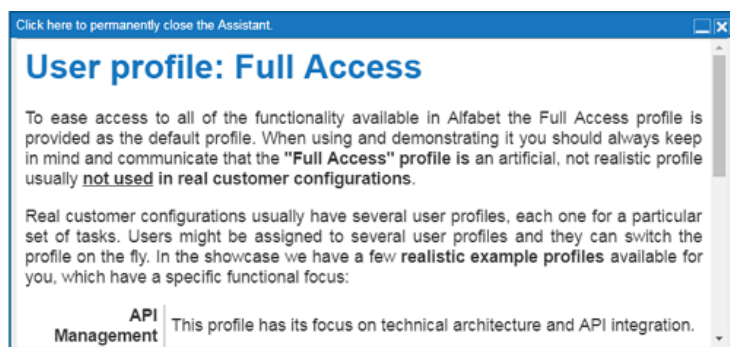


FIGURE: Automated help assistant for a user profile

When a relevant guide view, wizard, etc. is opened for which an automated help assistant has been configured, a fly-in element will be displayed for a few seconds in the upper-right corner of the user interface below the main menu. Users can click the fly-in element to open the automated help assistant which will open in a separate window. If the automated help assistant is not opened by the user, it will drop into the slide-in toolbar on the right of the screen in order to provide an unobstructed view of the current view. The automated help assistant for the current view can be opened at any time, as needed, by clicking the colored notch in the slide-in toolbar.

Please note the following:

- The automated help assistant will automatically be minimized if the user clicks in the Alfabet user interface.
- To close the automated help assistant, the user must click the close ( X ) button in the automated help assistant window.
- To reopen the automated help assistant for the current view, click the colored notch in the slide-in toolbar and click the automated help assistant icon to open the assistant.



The **Enable Automated Help Assistant** checkbox in the **User Settings** editor must be selected to display all automated help assistants that are available for your user profile. If you do not want the automated help assistants to be displayed in the user interface, you can disable the automated help assistants by removing the checkmark for the **Enable Assistant** option. For more information about specifying your user settings, see the section [Defining Your User Settings in Alfabet](#). For more information about the configuration required to implement the automated assistant capability, see the chapter *Providing Custom Online Help to the User Community* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Using the Context-Sensitive Help

A context-sensitive help may be available in Alfabet that provides you with the information that you require to understand the view that you are currently working with in the interface. The standard context-sensitive help contains documentation for all functionalities in the software, including those that may not be part of the configuration of your Alfabet solution.

To access a full-text search for the context-sensitive help, click the **Help** button in the upper right corner of the interface and click **Solution Help Search** in the dialog box. Enter your search term in the pop-up window and click the **Search** button in the pop-up window that opens. The search options are the same as for the full text search of the interface. For more information about search options, see the section



[Searching for Your Objects](#). You do not have to open the online help first to search for a keyword via the full-text search.

To access the context-sensitive help for functionalities, explorers, object profiles, and views that you are currently working with, click the **Help** button in the upper-right corner of the interface. A pop-up window opens. Click any of the links in the pop-up window to get the relevant help you need. Documentation is available for your current view and all higher levels in the hierarchy of the interface. Depending on the configuration of your solution, you may see links listed in the order below to any of the following in the Help Selector:

- Solution Help
- Solution Help Search
- Custom Help on User Profile
- Standard Help on Business Function
- Custom Help on Business Function
- Standard Help on Explorer
- Custom Help on Explorer
- Standard Help on Object View
- Custom Help on Object View
- Custom Help on Object Cockpit
- Standard Help on Page View
- Custom Help on Page View/Configured Report

The context-sensitive help will open in a separate browser tab.



Please note that the context-sensitive help is available only in English and German. The custom help will be available in the language that was provided by your enterprise.

When you access the context-sensitive help, you will see a page displaying information about the context you are working in. To navigate to another topic, you can do any of the following:


- Click a grey hypertext link in the documentation to navigate to a related topic,
- Click a green hypertext link in the documentation to view a glossary definition of the hyperlinked term in a new window,
- Click one of the buttons on the left to see the next or previous page in the help chapter this page belongs to,
- Click the **Back to Previous Help Page** button in the upper right of the page to navigate back to the page you viewed before navigating to the current page,
- Click the **Show Help Contents** button to open the navigation bar of the online help and to access the table contents, index, and glossary.

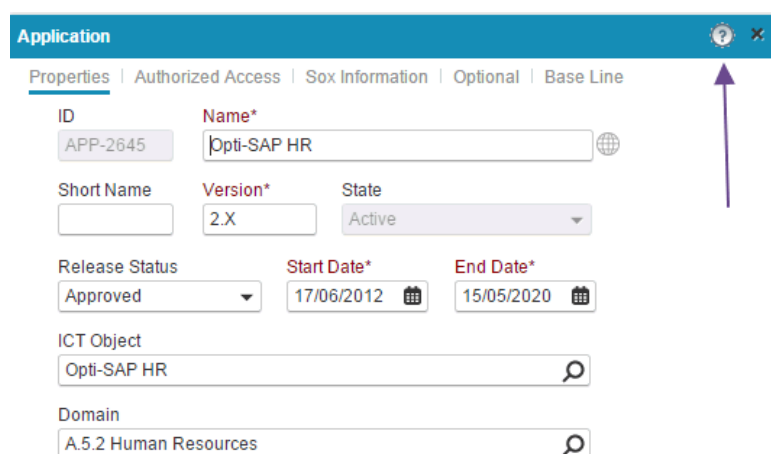
To open the navigation bar of the context-sensitive help, click the **Show Help Contents** button in the upper-left corner of the help screen. The navigation bar displays **Contents**, **Index**, and **Glossary** buttons.

Below the navigation bar you will see a **Forward** and a **Back** button that allows you to navigate to the pages you have viewed during the current session.

## Using the Help Available for Editor Fields and Filter Fields

To access specific information regarding the data to enter in filter and editor fields:

- **Filter fields:** Click the **Options**  button on the right edge of the filter panel and select **Help on Filter Fields** to access a help window providing information about the fields that can be filled out in the filter area.
- **Editor fields:** Click the **Help** button to access a help window providing information about the fields that can be filled out in the editor tab. Switch to another tab in the editor and click the **Help** button to access information about the fields in that editor tab.



## Requesting User Assistance for a View in the User Interface

Users may be able to request user assistance for a standard or configured view in the user interface. A **Request User Assistance** option may be displayed in the **Help** menu available in the main toolbar in Alfabet. If triggered, an email with a link to the view will be sent to the user in the enterprise who has been specified as responsible for user assistance.

Please note that the **Request User Assistance** option will only be displayed in the **Help** menu if the functionality has been enabled and a user has been specified as a user responsible for answering user questions about the Alfabet solution.



. The **Request User Assistance** option must be enabled in the XML object **SolutionOptions**. For more information, see the section *Enabling the User Assistance Functionality* in the reference manual *Configuring Alfabet with Alfabet Expand*. For more information about specifying a user as responsible for user assistance, see the section *Defining and Managing Users* in the reference manual *User and Solution Administration*.

## Reporting Issues about Your Alfabet Product

Please open a ticket in the Empower eService for any service request as well as all non-standard support incidents such as training requests, scripting, or data integration:

<https://empower.softwareag.com>

When you submit a ticket for a service request, you should include the main release number and patch version of your Alfabet product. This information can be accessed by clicking **Help < About Alfabet**. Tickets will be recorded and transferred to the relevant team.

Empower eService also includes:

- tracking ticket statuses
- local telephone numbers for support.

In addition to the local support telephone numbers, you can use the following toll-free number:

+800 2747 4357


## Using the Showcase Database

Software AG provides a showcase database with example data that allows you to examine and navigate many of the functionalities in Alfabet. The showcase database is included in the initial installation of Alfabet. The data examples are accessible via preconfigured bookmarks available in the **Bookmark Desktop** functionality.



Configured objects such as configure reports, workflows, custom editors, custom wizards, ADIF, etc. available in the Showcase database are based on native SQL and are designed for a database located on a Microsoft® SQL server. When the Showcase is installed on an Oracle® database server, execution of the solution configuration may fail.

To access the showcase data:

- 1) Log in to Alfabet by entering `CUSTOMER` in the **User Name** field and selecting `Full Access PS` in the **User Profile** field. A password is not necessary.
- 2) In the Alfabet user interface, click the **Show Bookmarks**  icon in the top left corner of the interface. The **Bookmark Desktop** view opens and displays all preconfigured bookmarks that demonstrate the Alfabet functionalities.

The following user names are available in the showcase database: `CUSTOMER`, `CLIENTE`, `GOSSARATH`, `ALFABET`, `KOWALSKI`, `LEE`, `MUSTERMANN`, `NATSCHI`, `NGOMBE`, `OMAR`, `PICARD`, `ADMINISTRATOR`, `USER1`, `USER2`, `USER3`. The user name `CUSTOMER` has full access permissions and allows you to view and navigate to all functionalities in Alfabet.

The showcase database provides the following additional user profiles:

- `Data Entry`: This user profile is limited to the functionalities that allow the basic capture of data including **Capture Applications**, **Capture ICT Objects**, **Capture Demands**, etc. This user profile can also be accessed with the user name `CUSTOMER`.

- **Viewer:** This user profile is a ReadOnly user profile for anonymous users. This user profile can only be accessed with the user names `USER1`, `USER2`, and `USER3`.

## Example Reports in the Showcase Database

Customer configured reports can be created by a solution designer with the configuration tool Alfabet Expand in order to provide customer-specific information that is not available via standard reports. The configured report can be either a tabular dataset or a graphic representation of data. The showcase database contains examples for all available types of configured reports. For a complete overview of the available types of reports that can be configured, see the chapter *Configuring Reports* in the reference manual *Configuring Alfabet with Alfabet Expand*.

A list of all configured reports available in the Showcase Database is available as a PDF file included in the Alfabet documentation.

## Chapter 3: Navigating the Alfabet Interface

This section provides general information that will help you understand the standard user interface. The most common interface elements as well as the basics to navigating through the user interface are described.



Alfabet is a highly modular, scalable, and configurable software. As a result of this high degree of configurability, your user interface may differ from the descriptions in the documentation. For an overview about how your interface may differ from the standard Alfabet interface, see the section [Configuration of Your Alfabet Solution](#) or contact your solution designer.

Multiple instances of the Alfabet user interface can be simultaneously open for a user in multiple browser tabs. In this way, the user can switch back and forth between views. The user can open a new browser window when navigating to a page view or object profile/object cockpit by selecting the link and using the Shift+Click interaction. The user can also navigate to a page view by right-clicking the hyperlink in an object profile or object cockpit and selecting the browser functionality to open the link in new tab or window. A new browser tab will be explicitly opened in the following situations:

- to open the Alfabet Diagram Designer
- to open a view from within a diagram
- to open a view from within a wizard
- to open a view to perform a workflow step

Please note that excessively long captions will be truncated on the Alfabet interface, but the entire text will be displayed in the tooltip. To view tooltips, point to editor and filter field captions, toolbar buttons, menu options, etc.

The following information is available:


- [Accessing Functionalities via Your Start Page](#)
- [Accessing User Assistance via the Slide-In Toolbar](#)
  - [Using the AlfaBot User Assistance](#)
    - [Using the Faceted Semantic Search of the AlfaBot](#)
  - [Using the Feedback Bot](#)
  - [Using the Automated Help Assistant](#)
  - [Using the Event Feedback Messages](#)
  - [Using Data Quality Widgets](#)
- [Working with Explorers](#)
- [Working with Object Profiles and Object Cockpits](#)
- [Working with Page Views](#)
- [General Overview of Alfabet Toolbar Buttons](#)

## Accessing Functionalities via Your Start Page

User profiles are the basis of user administration in Alfabet and serve as the entry point when accessing Alfabet. Every user must log in with a user profile that has been assigned to him/her by a user administrator. Therefore, all users accessing Alfabet must be assigned at least one user profile. However, users may possess multiple user profiles in accordance with their responsibilities in the user community and in the enterprise as a whole. A user can switch to another permissible user profile at any point during a user session.

A user profile specifies the Alfabet functionalities available to a user, the visibility and editability of object classes and object class attributes, as well as the availability of associated capabilities including, for example, wizards and workflows.

The standard Alfabet toolbar and menu bar are displayed above the start page. Please note the following about the standard toolbar and menus:

- The standard toolbar displays the following:
  - The **Start Page**  button. The options in this menu allow you to return to any of the start pages that are available to you. You may see any of the following options:
    - **Navigate to Guide Page**
    - **Navigate to Guide View**
    - **Navigate to Splash Screen**
    - **Navigate to Start Dashboard**
  - The **Bookmark** menu. The options in this menu allow you to create and view your bookmarks in the Bookmark Desktop as well as to create a splash screen as your start page. For more information about working with bookmarks, see the section [Creating, Managing, and Accessing Your Bookmarks](#).
  - The < **UserName** > menu. This menu allows you to manage your content in the Alfabet interface. For more information about the options available, see the relevant sections in the chapter [Getting Started With Your Alfabet Solution](#).
  - The **Help** menu. The options in this menu allow you to access context-sensitive help for the view you are currently working with. For more information about using the online help, see the section [Using the Help in Alfabet](#).
  - A global search field: If a search field has been configured for the start page, it will be available on the right side of the standard Alfabet toolbar during the entire user session. The global search field allows the user to search for objects in the Alfabet database. You can enter the name or partial name or ID of an object in the global search field. Once the first three letters of a search string have been entered in the global search field, the auto-fill function will invoke a search and start displaying a list of the first thirteen objects found by the query. The list of matching objects will be updated with each additional letter typed in to the search field. A configured report displaying the results of the search will be displayed in the current browser tab. For more information about configuring a global search field, see the section *Configuring a Global Search Field for a Guide View or Guide Page* in the reference manual *Designing Guide Pages for Alfabet*.

- Click your browser's Back button to navigate back to the previous page. A breadcrumbs trail is available to help you return to other pages in Alfabet that you have visited. Please note that if you start with a view that you opened via a bookmark, the Back button will return you to the bookmarked view regardless of the the number of times that you have navigated further in Alfabet.
- If screenspace is insufficient or if you decrease the size of the Alfabet screen, the button captions will be removed from the toolbar to ensure that the button and search bar remain accessible to the user. If the screenspace is insufficient for the display of all buttons without their captions, the buttons and search bar will be dropped from the toolbar starting with those furthest to the right.

After you have logged in to Alfabet, you will see your start page. Depending on the configuration of your solution, you may see any of the following as your start page.

- A dashboard configured as the start page. The dashboard typically displays visual elements that can be clicked to open relevant functionalities or views. For more information about the dashboards capability, see the section [Working with Storyboards](#).
- A personalized splash screen with a set of views that you specify as your start page. For more information about the splash screen capability, see the chapter a personalized splash screen with a set of views that you specify as your start page. For more information about the splash screen capability, see the chapter [Creating a Splash Screen As Your Start Page](#).
- The standard start view with drop-down menus in the toolbar that allow you to open functionalities relevant for your user profile. For more information, see the section *Configuring User Profiles for the User Community* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- A customized guide page or guide view that has been designed for your user profile. You can click any of the links to navigate to the targeted page or functionality. For information about the guide pages configured for your enterprise, please contact your solution designer. For more information about how to configure guide pages, see the reference manual *Designing Guide Pages for Alfabet*.

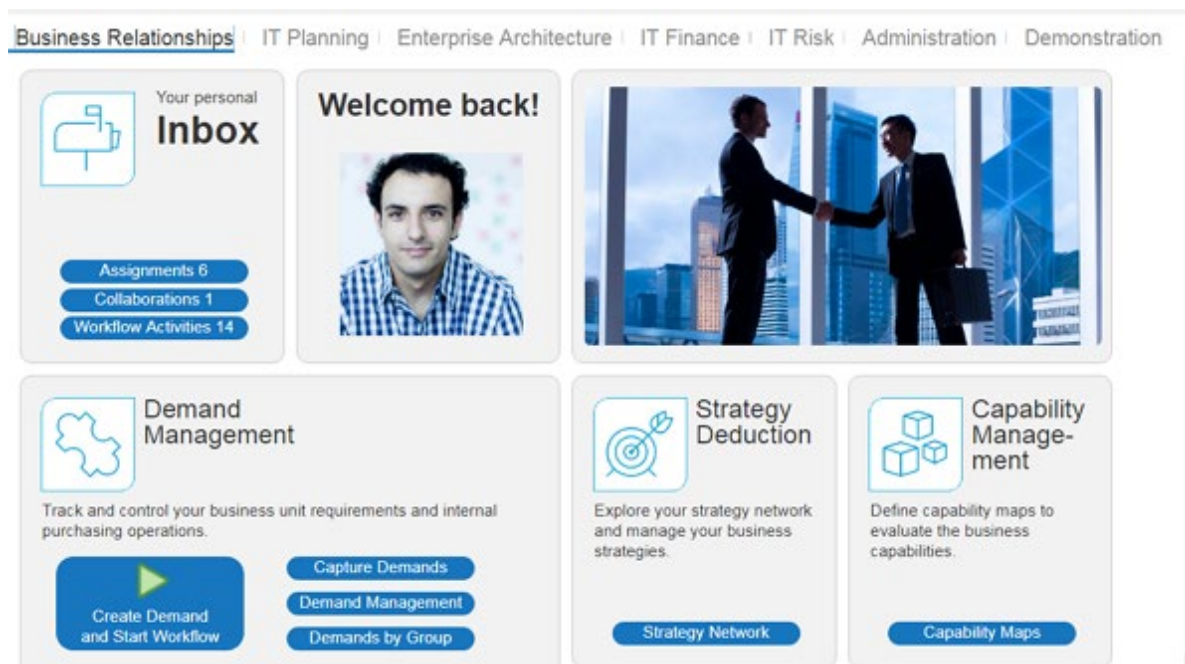



FIGURE: Example of a guide view that has been configured as the start page

A guide page or guide view may contain any of the following:

- Links to the functionalities assigned to the selected user profile
- Links to configured reports
- Informational text or images
- Links to documents
- URLs to Web resources
- Links to the Alfabet online help
- Configured reports or standard views directly embedded in the page
- A menu bar with drop-down menus below the standard Alfabet toolbar. The drop-down menus many also provide immediate access to a functionality or another guide page
- A configured search field available in the standard Alfabet toolbar that allows objects to be searched for
- A configured search field available in the standard Alfabet toolbar that allows objects to be searched for. An autocomplete function is available and displays potential matches in a drop-down menu. The query associated with the autocomplete function will be triggered after a short delay in typing in the field in order to display a relevant list of potential matches in a drop-down menu. The matching option must be explicitly selected in the drop-down menu for the data to be entered in the field.
- A welcome panel designed to align with your corporate branding
- A personal information topic that consists of the following:
  - An **Open Assignments** hyperlink that informs the current user about his/her open assignments and provides direct navigation to the **My Assignments** functionality
  - An **Open Workflow Activities** hyperlink that informs the current user about the workflow steps that he/she is responsible for as the responsible user or proxy user. The link provides direct navigation to the **Workflow Activities** functionality
  - An **Open Collaborations** hyperlink that informs the current user about the collaboration topics that he/she has initiated or been invited to and provides direct navigation to the **My Collaborations** functionality
- An automated help assistant available in the slide-in toolbar that provides custom help for your user profile or start page. For more information about working with the Assistant, see the section [Using the Automated Help Assistant](#).



Please note the following when navigating to the guide view or guide page:

- The **Start Page**  button will lead the user to the start page. If this is a guide page, the focus will be on the first node in the left navigation menu. If this is a guide view, the focus will be on the first tab.
- The browser's Back button will return the user to the most recently visited menu item in the left navigation for a guide page or the more recently visited tab for a guide view.



## Accessing User Assistance via the Slide-In Toolbar

A slide-in toolbar is available in the Alfabet use interface in order to provide additional support to the user in a non-intrusive way. The slide-in toolbar is located on the right edge of the user interface and, depending on the configuration of the view, may display various colored notches that provide access to the following capabilities in the slide-in toolbar:

- **AlfaBot User Assistance:** An AlfaBot capability provides assistance via a textual chatbot to help Alfabet users in general tasks such as creating and finding objects as well as navigating to configured reports or diagrams. The Alfabet capability is based on natural language processing technology provided by the third-party component Dialogflow. Users can open the AlfaBot window that opens, ask for help by typing in texts such as "Create an application" or "Navigate to TradeNet".
- **Feedback Bot:** A Feedback Bot capability is available that enables end users to provide feedback about the Alfabet implementation. The capability allows your enterprise to collect ratings, comments, and questions on the precise view the user is employing.
- **Automated Help Assistants:** An automated help assistant provides custom information via HTML documents, videos, animations, PPTX files for configured guide views, object cockpits, configured reports, wizards, etc.
- **Dynamic Quality Widgets:** Quality widgets may be configured for object cockpits and configured reports to provide information to the user such as the completeness of the underlying data of an object and may even provide a link to a view that allows incomplete data to be updated.
- **Event Feedback Messages:** Event feedback messages provide information about the success of asynchronously executed processes like scheduled jobs, the asynchronous import/export of data capture templates, and offline-executed configured reports, and provide direct access to execution results.

When you first open a view, you may see fly-in elements in the upper right corner of the user interface below the main toolbar. For example, you may see a fly-in element indicating that an automated help assistant is available as well as a quality widget displaying data. If you do not click these elements, they will drop into the slide-in toolbar after a few seconds so that the current view is no longer obstructed.

The slide-in toolbar can be activated by moving the mouse to the right edge of the screen. In this case, the slide-in toolbar will expand to reveal all available user assistance configured for the current view. When the slide-in toolbar is not activated it will be collapsed to a thin vertical bar to the right of the view's scrollbar and will display colored notches to indicate that various types of user assistance are available. Users can point to a colored notch to activate and expand the slide-in toolbar and thus open the relevant form of user assistance they are seeking. A tooltip may be configured explaining the functionality available for each colored notch. Clicking anywhere in the user interface will collapse the slide-in toolbar so that only the colored notches are visible.

The following information is available for the slide-in toolbar:

- [Using the AlfaBot User Assistance](#)
  - [Using the Faceted Semantic Search of the AlfaBot](#)
- [Using the Feedback Bot](#)
- [Using the Automated Help Assistant](#)
- [Using the Event Feedback Messages](#)

- [Using Data Quality Widgets](#)

## Using the AlfaBot User Assistance

An AlfaBot capability is available that provides assistance via a textual chatbot to help Alfabet users in general tasks such as creating, editing and finding objects as well as navigating to configured reports and diagrams. Users can open the AlfaBot window, ask for help by clicking a link to typing in texts such as "Create an application" or "Edit TradeNet" or "Open report". The AlfaBot will respond either by asking for more information to service the request, providing a list of objects matching the input, or directly executing the action derived from the user input. For example, if you enter "Edit application" the AlfaBot might respond with "Provide me with the name of the application." Or if you enter "Navigate to report" the AlfaBot might respond with "Provide me with the name of the report."

The following scenarios are supported by Alfabet:

- Navigate to an object

If no page view name is provided, the object profile or object cockpit of the object will open. The object profile or object cockpit that opens will depend on your user profile configuration. If a page view name is provided, the page view will open for the object.

- Create a new object

For objects such as applications and components that do not have a master object, the editor or wizard to create the new object will open. The editor or wizard that opens will depend on your user profile configuration. After you have created the object, the object profile or object cockpit of the new object will open. The object profile or object cockpit that opens will depend on your user profile configuration.

For objects such as information flows which are defined in the context of a source or target object and thus have a master object (the source or target object), the relevant view required to create the object will open.

- Edit/update an object.

The editor or wizard will open. If your user profile is configured to open a wizard to edit the object, you can tell the AlfaBot to open a specified wizard step.

- Navigate to a configured report.

Navigation to the configured report is based on the name of the report, keywords, and base object.

- Navigate to a diagram

Navigation to a diagram is based on the diagram type, diagram name, and the base object for which the diagram was created.

- Start a workflow for a new or existing object.
- Analyze the content of configured reports to find relevant information. You can ask for any information about objects like for example which are the applications with the highest costs or which components are cloud components.



User interaction in the AlfaBot window is based on natural language processing. A set of standard word patterns is available for the standard AlfaBot capability. The AlfaBot capability may be further configured to provide additional word patterns that are relevant for the enterprise's user


community. The user can enter a simple phrase and the AlfaBot capability will search for given structures and keywords based on training phrases. The training phrases are analyzed initially by the third-party NLP processing tool Dialogflow™. Dialogflow is a third-party service that is not embedded in Alfabet. A license must be purchased by the customer directly from Google® in order to be able to use the AlfaBot capability. For details about the configuration of the AlfaBot capability, see the section *Configuring the AlfaBot Capability* in the reference manual *User and Solution Administration*. For more information about activating the AlfaBot capability, see the section *Implementing the AlfaBot for Navigation via a Full-Text Command* in the reference manual *Configuring Alfabet with Alfabet Expand*.

To access the AlfaBot:

- 1) Click the AlfaBot notch in the slide-in toolbar and click the AlfaBot icon to open the AlfaBot window.
- 2) In the AlfaBot window, type in text. Enter questions such as "Create an application" or "Navigate to TradeNet".



The first time the AlfaBot is opened in a session, a link list with relevant use cases for using the AlfaBot is displayed. You can click the link that is relevant to your question instead of typing in a question. The AlfaBot will continue step-by-step to request information in order to understand the question at hand. If you would like to return to the link list after having used the AlfaBot in a session, enter any text like 'Hello'.

- 3) Hit the ENTER key or click on the arrow  to the right of the text field to enter the question.
- 4) The AlfaBot will answer with the following:
  - If your questions provides all required information, the AlfaBot will open the requested view, editor, or wizard.
  - If information (such as the name of an object or view) required to process your request is missing in your question, the AlfaBot will ask you to provide the missing information. If you do not know the exact name of an object class or view name, you can provide part of the name or a list of keywords to find the object or view. Keywords can be separated with a comma, the word `and`, and the ampersand character (`&`). The keyword search will also search for terms in the descriptions provided for objects and views.
  - If multiple results are available for a view name, object name, or object class name, the AlfaBot will return a link list of possible matches. The maximum number of returned results is configured by your solution designer. If one of the results in the list matches your intent, click the result to select it. Otherwise, enter search criteria in the text field beneath the result list to refine the search for the correct result. If you have clicked a result in the link list but the view to which you have navigated is not the right one, you can go back to the AlfaBot and click the **Go back to list of options** link.
- 5) Based on how the AlfaBot responds, either select the result that matches your query or refine your query. You may copy text in the AlfaBot window to formulate a refined query. Hit the ENTER key after each selection or text input.
- 6) The AlfaBot will show the complete history of requests from the current session. You can scroll to any point in the history and click on a link in any of the lists of possible matches. The AlfaBot will then continue the previous request with the new selected option.

If you select `Analyze` in the list of relevant use cases in the AlfaBot or enter a question starting with for example "What is" or "Who is", the AlfaBot will open the **Faceted AlfaBot Search** view. If you already

defined a question in the AlfaBot, this question will be visible in the search field on top of the view. Search view the view is described in the section XXX.

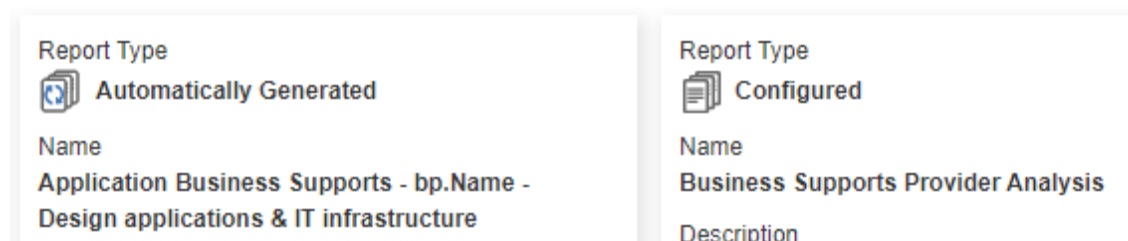
### Using the Faceted Semantic Search of the AlfaBot

In the search field of the **Faceted AlfaBot Search** view you can enter a question requesting information about objects matching defined conditions, like for example objects of a specific class for which a specific indicator is set to a specific value. The search functionality will then provide a list of configured reports that are identified to include relevant information.

In addition, tabular reports will be created automatically during processing of the question if the identified data permits the definition of a relevant dataset. Automatically generated datasets will only be added to the results if you are searching for an object class or object class stereotype with either a defined value for an object class property based on a fixed range of selectable values, a defined value for a specific indicator type, or a defined role for a specific person.

If automatically generated reports have been added to the result dataset, a **Report Type** filter will be available on the left of the result dataset to limit display to customer configured or automatically generated reports only.

In the result dataset, results are marked as automatically generated or customer configured with different icons and text:



This view is either available via the *Analyze* intent of the AlfaBot or as a separate functionality accessible via a menu or a navigation page. As a separate functionality, the view is called **Faceted Semantic Search**. Both the AlfaBot and the **Faceted Semantic Search** functionality are only available for search in English language and will be deactivated if the user interface is not rendered in English language.

In the search field, enter a question starting with for example "What" or "Who" or "Which". If you already defined a question in the AlfaBot, this question will be visible in the search field on top of the view.

The view will list all configured reports identified to show information that might include the requested information. For example if you have searched for "What are the applications with the highest risk", configured reports that find objects of the object class application and display information about risk indicators are listed, even if there is no hit for "highest".

If the results are not as expected, for example because there are too many results or results are not meaningful, you can use the following methods to fine tune your search:

- You can filter the results via the filters on the left of the dataset. These filters represent facets of the configured report, like the type of presentation, the object classes or object class stereotypes the configured reports are providing information about, or the indicator types the configured reports are providing information about. In addition, a filter for hits found for substrings of your question is

added to allow search to be limited to a subset of the words that were used to generate the search results.

Please note that filtering for a facet will automatically exclude all the reports that are not having this facet at all. If you are filtering for an object class via the **Base Class** facet, you will only see automatically generated reports in the result dataset because information about a base class is only available in automatically generated reports.

You will see different filter fields for each question asked because the generation of facet filters depends on the result dataset. A filter is only displayed if configured reports in the result dataset have different values for a facet.

- Try to alter your search to be more specific. For example for component names that are very long, the search may not find any results if you only look for a small part of the component name because the percentage of match with the name of the component is too low to be regarded as relevant.
- You can provide a comma separated list of relevant strings to avoid search for irrelevant words or search for parts of a name consisting of multiple strings separated with a whitespace. For example if the question in the search field contains "business support", configured reports providing information about "business support", "business", or "support" are found. If "business support" is listed in a comma separated search input, only configured reports about "business support" are found.

The view will list all configured reports identified to show information that might include the requested information. For example if you have searched for "What are the applications with the highest risk", configured reports that find objects of the object class application and display information about risk indicators are listed.

On the left of the results, a filter panel with additional filters will be available that allows results to be filtered. This filter panel is generated dynamically, taking the search results into account. For example you can filter for the type of report. The drop-down list will only list the report types that are available in the result dataset. You can also filter by base class if the configured report shall be opened for a base object, or for evaluation types if the configured reports inform about indicators.

You can navigate from the search results directly to the configured report. Each search result shows the name and description of the configured report, the hits the search engine found when comparing the words in the search string with the relevant information about the configured reports, and a ranking within the search results. In addition, a popularity score informs you whether the report is used seldom or often by the user community.

## Using the Feedback Bot

A Feedback Bot capability is available in the slide-in toolbar that allows you to provide feedback about any view, configured report, object cockpit, guide view, etc. implemented in your Alfabet solution. Two different concepts are available for the Feedback Bot:

- The Feedback Bot may provide a 5-star rating system whereby you rate the current view and optionally provides feedback. In this case, you will typically not receive a response to your feedback.
- The Feedback Bot may provide a contact form whereby you provide feedback or ask a question. In this case, you would typically receive a response from a user responsible for the feedback.

The Feedback Bot may be configured to implement only one or both concepts. If both feedback concepts are implemented, the start page of the Feedback Bot will open when you click the Feedback Bot icon in the slide-in toolbar. Please note that the content displayed in the Feedback Bot is highly configurable and thus cannot be described here in detail. Typically your solution designer will configure texts in the Feedback Bot that will help you to provide your feedback. After you have provided your feedback and clicked the **Send** button, an email will typically be sent to a mailbox configured as the recipient of the feedback.

Please note that screenshots may be made in association with a feedback entry. The screenshot capability may be implemented for the 5-star rating system and/or the first-level support concept. The screenshot will be made of the part of the screen where your mouse pointer is focused at the time that the feedback was provided. No user information displayed in the masthead will be included in the screenshot.



The following is required to enable the Feedback Bot capability:

- The XML attribute `IsActive` must be set to "true" in the XML object **AlfaFeedbackBotConfig**. For more about the configuration required for the Feedback Bot capability, see the section *Configuring the Feedback Bot* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- The **Enable Feedback Bot** attribute must be set to `True` for the relevant user profiles to use the Feedback Bot capability. For more information, see the section *Creating a User Profile* in the reference manual *User and Solution Administration*.
- Each permissible user must select the **Enable Feedback Bot** checkbox in the **User Settings** editor to enable the Feedback Bot capability. For more information, see the section [Defining Your User Settings in Alfabet](#).

All feedback created will be displayed in the **Feedback Review** functionality (`ADMIN_FeedbackInstances`) that may be accessed via an administrative user profile. The feedback can be systematically analyzed based on various filters such as feedback types, views type, base object, user profile, etc. in order to understand areas of improvement in the configuration of the Alfabet solution. For more information, see the section *Reviewing the Feedback Provided by the User Community* in the reference manual *User and Solution Administration*.

## Using the Automated Help Assistant

Training users how to process a specific use case or to carry out their tasks in Alfabet can be challenging. The automated help assistant capability supports the enterprise in training efforts as well as disseminating relevant information to occasional users about the Alfabet functionalities that they use. The automated help assistant capability allows the enterprise to provide a URL targeting an HTML document, video, animation, PowerPoint file, etc. with explanations about methodology, use cases, procedural instructions, and complex processes when working with wizards with many wizard steps, for example. The automated help assistant can be configured for any user profile and displayed on the Home page whether that is a guide view/guide page, splash screen, or storyboard. Automated help assistants can also be configured for a custom wizard, custom object profile and object cockpit, standard business function/custom explorer, standard page view, or configured report. If the standard page view or configured report is embedded in a wizard step, the automated help assistant will also be available for that wizard step.

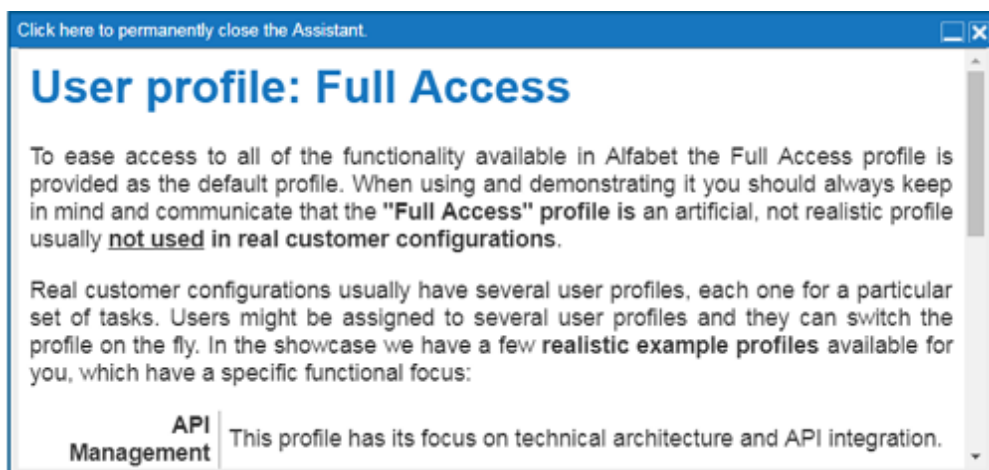


FIGURE: Automated help assistant for a user profile

When a relevant guide view, wizard, etc. is opened for which an automated help assistant has been configured, a fly-in element will be displayed for a few seconds in the upper-right corner of the user interface below the main menu. Users can click the fly-in element to open the automated help assistant which will open in a separate window. If the automated help assistant is not opened by the user, it will drop into the slide-in toolbar on the right of the screen in order to provide an unobstructed view of the current view. The automated help assistant for the current view can be opened at any time, as needed, by clicking the colored notch in the slide-in toolbar.

Please note the following:

- The automated help assistant will automatically be minimized if the user clicks in the Alfabet user interface.
- To close the automated help assistant, the user must click the close ( **X** ) button in the automated help assistant window.
- To reopen the automated help assistant for the current view, click the colored notch in the slide-in toolbar and click the automated help assistant icon to open the assistant.



The **Enable Automated Help Assistant** checkbox in the **User Settings** editor must be selected to display all automated help assistants that are available for your user profile. If you do not want the automated help assistants to be displayed in the user interface, you can disable the automated help assistants by removing the checkmark for the **Enable Assistant** option. For more information about specifying your user settings, see the section [Defining Your User Settings in Alfabet](#). For more information about the configuration required to implement the automated assistant capability, see the chapter *Providing Custom Online Help to the User Community* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Using the Event Feedback Messages

An event feedback message provides information about the availability of results for processes that have been executed asynchronously in the background. Asynchronous response messages are available for the following processes:

- Asynchronous import and export of data capture templates.

- Events based on customer-defined ADIF import and ADIF export event templates that are configured to provide the asynchronous response.
- Jobs triggered via the **Job Schedule** functionality.
- Configured reports that are executed offline.









By default, the messages will be sent to the user triggering the process. In the case of event templates, this is the user that triggers the execution of the event template (for example, when entering or closing a wizard step or workflow step). For scheduled jobs, this is the user that is defined in the job schedule as executing user, or, if the executing user is not defined, the user triggering the job schedule. For data capture templates, this is the user triggering the import or export of data.

After the asynchronous process is triggered, you can continue to work in Alfabet. A slide-in event feedback message window will be displayed when execution has finished. The slide-in event feedback message window will provide information about the success of the process and provide access to log files and process results. Clicking anywhere outside the event feedback message closes the window. It can be re-opened via the slide-in toolbar as long as you remain working in the current view. After changing to another view, the message can no longer be opened separately but will be available via the **My Last Event Feedback** notch in the slide-in toolbar which contains a list of all event feedback messages that were presented to the current user during the last 24 hours.



The success of the event is only checked when the view is changed or refreshed. Therefore, you will not see the event feedback message if you remain inactive in the current view. If you trigger a process and then change to another session (for example, by logging out and logging in again), you will still be informed via the event feedback message when the triggered process is finished.

The **Event Feedback** window informs about the success of the execution and provides access to resulting data:

- Successfully executed processes are listed with a checkmark in a green field  while failed processes are listed with a red cross .
- To the right of the message, log files and process results are available via download  or link  symbols.
- Move the cursor over the download  or link  symbol to view a tooltip describing which content is available.
- Click the download  or link  symbol to access the data.
- If you have set a size restriction for text in table cells with the **Max. Dataset Cell Text Length** attribute in user **User Settings**, the text in the event feedback window will be displayed truncated if it is longer than the defined maximum text length. To view the full text in a tooltip window, move the cursor over the text.

## Using Data Quality Widgets

Quality widgets may be configured for object cockpits and configured reports to provide information to the user such as the completeness of the underlying data of an object and may even provide a link to a view



that allows incomplete data to be updated. The quality widget may either be a configured widget report, Gantt chart report or a configured business chart report that provides additional information to the user such as the completeness of the underlying data of the object associated with the object cockpit or configured report.

When the user opens the configured report/object cockpit, the fly-in element will be displayed and the user can click the caption to open the quality widget. If the configured report opening as quality widget provides navigation, the navigation target will open in a new tab in the browser. The user could thus update data in this view and reload the original view to display the updated data. If the user does not open the secondary view, it will drop in to the slide-in toolbar after a few seconds. The quality widget will remain open until the user clicks outside of the pop-up window or clicks the close button.



Quality widgets can be configured via the secondary views available for object cockpits and configured reports. For more information about the configuration of a quality widget, see the section *Configuring Reports* in the reference manual *Configuring Alfabet with Alfabet Expand*. For more information about configuration of the appearance of the secondary view in the slide-in toolbar, see the section *Configuring GUI Scheme Definitions for the Alfabet Interface* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Working with Explorers

When you access a functionality in Alfabet, you may see a number of different types of views depending on the functionality you have chosen. For example, you may see a view entailing many tiles that allow you to navigate to the specified explorer or you may see a standard explorer on the left and a workspace on the right. Each explorer has a root node and displays a hierarchy of objects. Please note the following regarding standard explorers:

The screenshot shows the Alfabet interface. On the left, an explorer displays a hierarchy of nodes under 'All Finance IT'. The selected node is '1. Market Data', which contains several sub-nodes like 'BLOOMBERG 6.6.3', 'CALENDAR 3.2.5', 'Course 1', 'Financial Times 2.1', 'Links 1', 'PARIS 1.0', 'Rating Database 4.1.6', 'Reuters Dealing 4.3', 'Reuters RMDS 1.5', 'Reuters Triarch 1', 'salesforce.com 9', 'salesforce.com 9.1', 'salesforce.com 9.2', 'salesforce.com 9.3', 'SAP CMS 2.0', and 'Wagner Classifier 1.0'. Below these is '2. Trade Entry'. On the right, the workspace displays the 'Application Group APPG-23: All Finance IT' overview. It includes a toolbar with 'Workflow', 'Edit', 'Mark as Reviewed', and 'Publish' buttons. Below the toolbar, the 'APPLICATION GROUP OVERVIEW' section shows a table with the following data:

ID	SHORT NAME
APPG-23	undefined
NAME	TYPE
All Finance IT	undefined
AUTHORIZED USER	PARENT GROUP
Ngombe Lisa	undefined
STEREOTYPE	undefined

Below the overview, the 'BASIC DATA' section contains links for 'Mandates', 'Responsibilities', 'Authorized Deputies', and 'Authorized User Groups', each with a brief description of its function.




FIGURE: Selecting a node in an explorer

- Standard explorers typically display the standard icon assigned to each object class. However, if the objects in the explorer are based on object class stereotypes, the icon defined for the object class stereotype will be displayed in the explorer.




Custom explorers may be configured by your solution designer. In this case, you will see a non-standard explorer that will have a customized hierarchy of object classes displayed in the explorer as well as different views displayed in the workspace to the right when an object is selected in the explorer. Please note that if a custom icon has been defined for an object, the custom icon will be displayed in the custom explorer. If the object in the custom explorer is based on an object class stereotype, the custom icon will have precedence over the icon defined for the object class stereotype. If no custom icon or object class stereotype icon has been defined, the standard icon will be displayed in the custom explorer. For more information about the custom explorers you encounter, contact your solution designer. For detailed information about the configuration of custom explorers, see the section *Configuring Standard Business Functions and Custom Explorers* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- Click the expand and collapse arrows next to the nodes of the explorer to view or hide the node's subordinate objects.
- Click the root node to display either a view that you can work in or multiple links that will open other views.
- Click a node in the explorer to view its object profile/object cockpit(s) in the workspace.
- Click the blue scrollbar on the right edge of the explorer to scroll the results.
- To search for an object in the explorer, click a node in the explorer where you expect to find the object. For the sake of performance, only 1000 nodes below the selected node will be searched. Enter the name or part of the name in the search field and click the Return key to execute the explorer search. The first result is highlighted. Click the Return key to navigate to the next result in explorer. Please keep the following in mind when entering search pattern:
  - If you enter the full name of an object, it must be spelled correctly. The search pattern is case-insensitive.
  - For the sake of performance, only the first 1000 nodes are searched starting with selected node. The search will first target the subordinate nodes of the selected node and continue to subsequently search the node hierarchies listed below it. Please note that only the selected node and its sub-nodes will be searched. If no objects are found in the search, a message will be displayed stating that no objects have been found below the selected explorer node. You can select a different node and begin a new search. If the object you are searching cannot be found because the explorer is excessively large, it is recommended that you use the **Simple Search** functionality to find the object.
  - Depending on the configuration of your solution, an automatic wildcard may be implemented. If this has not been configured by your solution designer, you must explicitly enter the \* symbol as a wildcard character. Please note that name and version are concatenated in the search string. For more information about the configuration of wildcards, see the section *Configuring the Full-Text Search Capability* in the reference manual *Configuring Alfabet with Alfabet Expand*.
  - Objects with names that begin with a special character (such as Å or Ü) are listed in the Others sections located at the bottom of the explorers displayed in the Alfabet interface.

- Click the **Hide Explorer**  button at the top of the explorer to hide the explorer from the interface and increase the workspace.
- Click the **Show Explorer**  button at the top of the explorer to return the explorer to the interface and reduce the workspace.
- Click the **Refresh Explorer**  button at the top of the explorer to update the explorer with new objects.



Most changes that you make to an object that you have selected in an explorer will be automatically updated. However, if you make a change to the parent object of a currently selected object, then you must click the **Refresh Explorer**  button to update the explorer. For example, if you select an application and assign it to a new application group or if you select an organization and define it as a sub-organization of another organization, then you must update the explorer to reflect the new position of the application or organization in the explorer.





- If you select an object in the explorer and then navigate to a page view in the object profile/object cockpit by clicking a hyperlink, the entire interface available will be overloaded with the view and the explorer will no longer be displayed.

## Working with Object Profiles and Object Cockpits

When you click an object in the explorer, you will typically see the object profile describing the selected object's attributes and displaying hyperlinks to all of the views in which you can further refine the object's data. Depending on your solution configuration, you may see one or more tabs in the object profile toolbar that allow you to display customized object cockpits. Because Alfabet is highly configurable, it may be that the object profile has been hidden and you only see one or more object cockpits. Click the object profile or object cockpit tabs to open the relevant view.

## Application: APP-3243 Trade\*Net 6.0.3

[Object Profile](#) | [Application Cockpit - Architecture Perspective](#) | [Flow Cockpit](#)

 Action ▾
 Workflow ▾
 Edit
 Change Object State

**APPLICATION OVERVIEW**

<b>ID</b>	<b>SHORT NAME</b>
<b>APP-3243</b>	undefined
<b>NAME</b>	<b>VERSION</b>
<b>Trade*Net</b>	<b>6.0.3</b>
<b>OBJECT STATE</b>	<b>RELEASE STATUS</b>
<b>Active</b>	<b>Approved</b>
<b>ICT OBJECT</b>	<b>START DATE</b>
<b>Trade*Net</b>	<b>20/01/2012</b>
<b>END DATE</b>	<b>IS VARIANT</b>
<b>20/01/2019</b>	undefined
<b>VARIANT OF</b>	<b>PREVIOUS VERSION</b>
undefined	undefined
<b>FOLLOWING VERSION</b>	<b>AUTHORIZED USER</b>
undefined	<b>Mustermann Erika</b>
<b>DOMAIN</b>	<b>STEREOTYPE</b>
<b>Trading</b>	<b>Application</b>

**BASIC DATA**

**Mandates**  
Assign the selected object to a mandate.

**Responsibilities**  
Define a functional relationship that a user or organization has in relation to the selected object.

**Authorized Deputies**  
Define the authorized deputies that have deputy responsibility for the selected object.

The object profile summarizes information that is relevant to a selected object. The header of the object profile displays the name of the object class and the object's ID and name.

The object profile typically displays an overview of the object's attributes. Some attributes are highlighted in blue. You can point to the attribute caption to view a tooltip explaining the meaning of the attribute. Attribute values that are exceedingly long will be truncated. You can point to any attribute value to view the complete value. If interoperability with Skype for Business Server® is configured for your enterprise and Skype is permissible for a user, a Skype status symbol will be displayed next to the user's name. A user can click the Skype status icon to open the Skype screen, allowing the user to contact the authorized user of an object should questions arise. For more information about using the Skype functionality in Alfabet, see the section [Skyping with Your Colleagues](#).



Alfabet provides a content voting capability similar to that found in social media. The capability is configurable and can be implemented to allow users to rate, like, and identify expert users for specified object classes. If configured, the button to vote or like an object or report will be available in the object profile toolbar. The following may be implemented:


- A voting concept allows an object to be voted on based on a star-rating system. The voting can be expressed as an icon with a specified number of stars or via another type of icon gallery that supports rating an object. For example, users could specify their recommendation of an application based on a 3-star rating system.
- A like concept allows an object to be endorsed based on a binary rating system. The rating can be expressed via a Like button or Heart icon or any other type of icon gallery that supports a true/false rating of an object. For example, users could click the Like button to specify their approval for a configured report. Please note that the Like button would be

available in the object profile of that configured report and not in the configured report itself.


- An expert concept allows a user to register him/herself as an expert of an object. For example, a user could specify him/herself to be an expert of a technology or technical component. The user could deregister him/herself at any time.

For more information about configuring the content voting capability, see the section *Configuring the Content Voting Capability via Object Associations* in the reference manual *Configuring Alfabet with Alfabet Expand*.

The object profile also displays workspaces which are rectangles grouping a set of hyperlinked page views and reports relevant to the selected object. You can click on any hyperlinked view to open the relevant view in order to view and/or edit the data.

If you do not have the necessary permissions to edit the selected object or the object has a non-editable release status, you will see the  symbol displayed next to the object name and ID in the header of the object profile. In this case, the object profile is ReadOnly and the object cannot be edited.


Because Alfabet is so highly configurable, the object profiles you see in your Alfabet solution may differ significantly from the standard object profile displayed above. Furthermore, the design, content, and functionality available for an object profile may vary depending on the user profile you are currently logged in with. Typically, object profiles will be customized by your solution designer in order to address the tasks associated with your user profile. Thus, if you have multiple user profiles that you can use to access Alfabet, you may see different information displayed for the object profiles available for an object class. The following aspects may be configured in an object profile:

- The object information in the header of the object profile. For example, the standard object profile for the object class Application displays the object class, ID, and name of the object. However, other properties such as the start date or authorized user might be displayed in your configuration.
- The operations available in the toolbar. A standard button or an option in a drop-down menu may be hidden by your solution designer and thus not visible in the object profile toolbar. Furthermore, if workflows have been configured for the selected object class, you may see a **Workflow**  button in the toolbar that will allow you to perform the current workflow activity.
- The standard and custom attributes displayed in the attribute overview section of the object profile. Typically, the visibility of standard and custom attributes is configured by your solution designer. You can specify in your user settings whether you want to see only the attributes that have values defined or whether you want to see all relevant attributes including those without a value defined. Depending on your configuration, such attributes may display tooltips on mouse-over.



Scalar attributes may be edited via in-line editing directly in the **Attributes** section of an object profile without needing to open the object's editor or wizard. The **Edit** icon will be displayed when you point to the attribute to indicate the object can be edited in-line. Depending on the type of attribute, you can click in the field and define a text, select a value in a drop-down list, or specify a date. Upon completion, you must click the

**Save**  button to save the definition to the Alfabet database or click the **Can-**

**cel**  button to remove the definition. Please note that all unique constraints defined for the class and validation rules specified for the editor/wizard associated with the user profile will be applied.

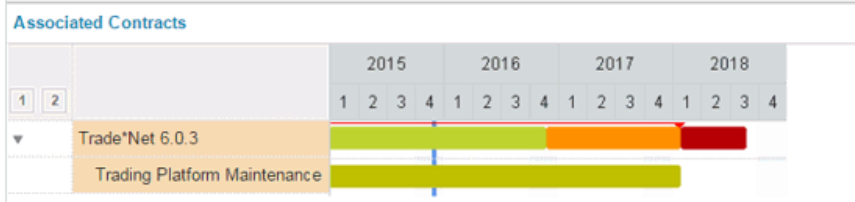
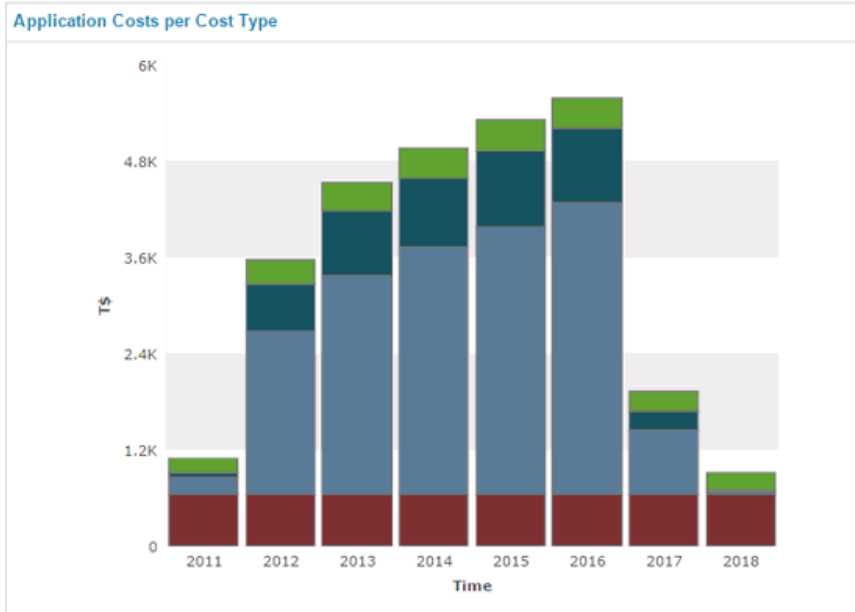
- The visibility of standard page views displayed in the object profile may be configured by your solution designer. Furthermore, configured reports that are not part of the standard product may be included in an object profile.
- One or more object cockpits may be configured to provide additional views capturing a specific set of attributes, page views, business graphics, and configured reports deemed relevant for a particular perspective.

If object cockpits have been configured for the object profile, you will see the tab to open them to the right of the object profile tab. You can switch between the object profile and the object cockpits by clicking the relevant tab.

Application: Trade\*Net 6.0.3

Object Profile:Application 1. Architecture Overview 2. Business Architecture  
 3. Technical Architecture 4. Information Architecture 5. Cost and Contract



DESCRIPTION  
 Trading back-bone of our company.





An object cockpit provides users with an immediate and transparent overview of data for the selected object, typically from a particular perspective such as an architecture perspective or a strategy perspective. For example, one object cockpit for the object class Application might display data relevant for understanding the application in the as-is architecture, another cockpit might display data relevant to master planning issues, and a third cockpit might display relevant data for cost and budget issues.






Keep the following in mind when working with the object cockpit:

- Please consider the following regarding the **Attributes** section of an object cockpit:

- Scalar and reference attributes may be edited via inline editing directly in the **Attributes** section of an object cockpit without needing to open the object's editor or wizard. The **Edit** icon will be displayed when you point to the attribute to indicate the object can be edited inline. Depending on the type of attribute, you can click in the field and define a text, select a value in a drop-down list, or specify a date. Upon completion, you must click the **Save**  button to save the definition to the Alfabet database or click the **Cancel**  button to remove the definition. Please note that all unique constraints defined for the class and validation rules specified for the editor/wizard associated with the user profile will be applied.
- Attributes displayed in the attribute overview in the object cockpit may provide a hyperlink. Depending on your configuration, such attributes may display tooltips on mouse-over or may be colored in a different way to indicate that you can navigate when you click the attribute caption.
- The maximum height of group boxes containing attributes can be configured in order to control the height of group boxes. If the content of the group box exceeds the configuration of the maximum height, a scrollbar will be added so that the user can scroll to see the complete content in the group box.
- Please consider the following regarding embedded views and reports in the object cockpit:

  - All views displayed in the object cockpit are ReadOnly. If a view in the object cockpit displays a hyperlinked caption, you may navigate to the view for the view displayed in the object cockpit or to a completely different view that may be useful for the user context. The data will be displayed based on the last values defined when the user last opened the view or report. Once you have opened a view, the context-sensitive online help can be accessed as usual.
  - The height of embedded views and configured reports including datasets, matrices, Gantt charts, and diagrams will be automatically reduced based on the content in the view, thus ensuring that space is used efficiently. Please note that in the case of grouped datasets, the height of the embedded view/report will be based on the height specified by the solution designer. If the grouped dataset in the embedded view/report is collapsed, height of the view/report will decrease to the height required by the content. If the grouped dataset is expanded, the height will increase to the maximum specified height. Please note that collapsing or expanding the grouped dataset in the embedded view/report may result in the dynamic rearrangement of the object cockpit.
  - If no data is shown in a configured report or view embedded in the object cockpit:

    - A filter  symbol will be displayed in the header of presentation controls embedded in object cockpits if filters are active in the underlying page view or custom configured report. The filter symbol indicates that only some of the applicable data is displayed. It might also indicate why the presentation controls displays a " **No data provided ...** " message. Users can hover with the mouse pointer over the filter symbol to display a tooltip providing the filter summary.
    - If the presentation control does not show data because a mandatory filter has not been defined, a filter  symbol will be displayed with a tooltip providing information about the undefined mandatory filter field(s).

- The content of views and configured reports embedded in an object cockpit can be collapsed and expanded in order to optimize the use of space and reduce the amount of scrolling required. A **Collapse**  button is displayed in the right corner header of the embedded view. When clicked, the view will collapse to show only the header bar with the caption of the view. The contents will be automatically rearranged in the object cockpit when the view is collapsed. You can click the **Expand**  button in the header to expand the view.
- A **Navigation**  button is available in the header bar of embedded views and reports. When clicked, the view or report will open to fit the full screen. The user can also navigate to the view or report by clicking the caption of the view or report in the header bar.
- A floating toolbar which contains buttons to zoom or show the legend is displayed in datasets and business graphics that are embedded in the object cockpit. The buttons are streamlined and a new **Collapse**  button has been added to the floating toolbar to minimize the amount of space that it takes up. The collapsed floating toolbar can be maximized again via the new **Expand**  button. The floating toolbar can also be moved by dragging-and-dropping it to a new location within the view. The floating toolbar will be collapsed per default when the object cockpit is first opened.
- A configured report that has the report state set to **Plan** will not be displayed. A message stating that the report is under construction will be displayed in its place in the object cockpit.
- To return from a view that you have navigated to in the object cockpit, click your browser's Back button.

## Working with Page Views


Depending on your enterprise's configuration, an object profile may have a varying number of workspaces that provide access to page views where data is displayed and maintained. A workspace in an object profile groups a set of page views in the object profile. The number and selection of workspaces, the workspace captions, and the set of page views displayed in each workspace are configurable and may vary depending on the user profile you are currently logged in with.



## Application: Trade\*Net 6.0.3

Information Flows

From	Application	To	ID	Start Date	End Date	Object State
1 FX & MM 3.4	>> Trade*Net 6.0.3 (Pricing 1)		IF-1757	02/03/2013	01/11/2016	Active
2 Eurex 1.0	>> Trade*Net 6.0.3		IF-1761	20/05/2013	20/01/2018	Active
3 Financial Times 2.1	>> Trade*Net 6.0.3		IF-1766	16/05/2012	20/01/2018	Active
4 vMarket 2.7	>> Trade*Net 6.0.3		IF-1773	20/01/2011	20/01/2018	Active
5 Eurex 2.0	>> Trade*Net 6.0.3		IF-2007	30/09/2017	20/01/2018	Plan
6 Exchange Main Mail Relay 1.2	>> Trade*Net 6.0.3		IF-2417	01/08/2013	20/01/2018	Active
7	Trade*Net 6.0.3	>> FX & MM 3.4	IF-1758	05/05/2012	20/01/2018	Active
8	Trade*Net 6.0.3	>> Position 1.8	IF-1759	20/01/2011	20/01/2018	Active
9	Trade*Net 6.0.3	>> Eurex 1.0	IF-1762	20/05/2013	20/01/2018	Active
10	Trade*Net 6.0.3	>> Rep 1.0	IF-1763	13/10/2011	20/01/2018	Active
11	Trade*Net 6.0.3 (Oracle Database 11g)	>> Legal Report 1.6 (Legal Reporting Server 1.6)	IF-1764	04/06/2013	01/11/2016	Active
12	Trade*Net 6.0.3	>> AF Enterprise Control 4.0	IF-1866	14/12/2011	20/01/2018	Active
13	Trade*Net 6.0.3	>> Eurex 2.0	IF-2008	30/09/2017	20/01/2018	Plan
14	Trade*Net 6.0.3 (Oracle Database 11g)	>> Legal Report 1.8 (Legal Reporting Server 1.8)	IF-2011	10/10/2017	20/01/2018	Plan
15	Trade*Net 6.0.3	>> Anno-Fact 1.0	IF-2400	01/11/2014	20/01/2018	Active
16	Trade*Net 6.0.3	>> Anno-Fact 2.0	IF-2403	06/11/2016	20/11/2017	Plan
17	Trade*Net 6.0.3	>> AI-Miner 1	IF-2408	07/11/2016	07/11/2021	Plan
18	Trade*Net 6.0.3	>> DataMart 1.5	IF-2409	07/11/2016	20/01/2018	Plan
19	Trade*Net 6.0.3	>> Exchange Main Mail Relay 1.2	IF-2414	01/08/2013	20/01/2018	Active

A page view is the context where you capture, maintain, or view data for the objects you are responsible for. If you do not have the necessary permissions to use the available Read/Write interactions or the selected object has a non-editable release status, you will see the  symbol displayed in the header of the page view. The symbol will not be displayed for views that inherently provide no editing capabilities.

A page view may display a table, diagram, matrix view, portfolio chart or other business graphic displaying data. A general description about the purpose of the page view is displayed in the object profile. Click the hyperlinked title of the page view in the object profile to open the view. In the page view, you can point to the caption of the view to display the description of the view in a tooltip.

A preview can be opened for an object displayed in a dataset or business graphic. The preview is a pop-up window that displays basic information about the object as well as a **Show Details** button that, when clicked, allows the user to navigate to the object profile.



If the page view or configured report displays portfolios, Gantt charts, branching diagrams, sun-ray diagrams, circular roadmaps, etc., you can specify whether or not the graphics shall be built dynamically when the view is opened. This is done via the **Enable User Interface to Poll Web Server** attribute in the **User Settings** editor. For more information, see the section [Defining Your User Settings in Alfabet](#).

Please note the following:







- To open the preview, click the object and hold the mouse button until the preview opens. Click anywhere outside of the preview to close it.
- The preview displays all standard and custom attributes that have been configured to be displayed in the preview relevant for your user profile. Blue links will be displayed for properties for which navigation has been specified. Click the link to open the object profile/object cockpit of the referenced object. For more information about the configuration of the preview window, see the section *Configuring Class Settings for Object Classes and Object Class Stereotypes* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- If the preview contains the email address of the user, the email will also be displayed with a blue hyperlink. Click the link to open your email client in order to send an email to the relevant user. If interoperability with Skype for Business Server® is configured for your enterprise and Skype is permissible for a user, a Skype status symbol will be displayed next to the user's name. A user can click the Skype status icon to open the Skype screen, allowing the user to contact the authorized user of an object should questions arise. For more information about using the Skype functionality in Alfabet, see the section [Skyping with Your Colleagues](#).
- Scalar attributes displayed in the preview window can be copied and saved to the clipboard and later pasted into a relevant field. Please note that copying of links is not supported and will not result in an invalid URL.
- Actions that can be carried out on the object may be available via an **Operations** button displayed in the preview.

For more information about the types of views available and how to specify the display of the views, see the section [Analyzing Your Data in Page Views and Reports](#). The chapter [Creating, Maintaining, and Evaluating Data in Alfabet](#) describes the basic tasks that you will encounter in page views.










## General Overview of Alfabet Toolbar Buttons



The following table is an overview of the most common buttons available in the Alfabet toolbar as well as the toolbars available for object profiles and page views. Point to a button to see the tooltip displaying the tool's name. Depending on the configuration of your solution, some toolbar buttons may be greyed out. These toolbar buttons are disabled and cannot be used by you.

Button	Name	Action
	<b>Back</b>	Click your browsers Back button to navigate back to the previous page. A breadcrumbs trail is available to help you return to other views in Alfabet that you have visited.
	<b>Start Page</b>	Drop-down menu options allow you to access your bookmarks as well as create new bookmarks and express views.
 BOOKMARK 	<b>Bookmark</b>	Allows you to create a bookmark or express view to the current view or define a splash screen as your start page.
 ALFABET 	<b>&lt;UserName&gt;</b>	Drop-down menu options include logging out, changing user profiles, changing mandates, and defining user settings.

Button	Name	Action
	<b>Help</b>	Provides access to context-sensitive Help as well as a full-text search of the Help.
	<b>Hide Explorer</b>	Typically displayed at the top of an explorer. Click to hide the explorer and expand the main view that you are working with. This is particularly useful for views such as diagrams or business maps that typically contain a large amount of graphic data.
	<b>Show Explorer</b>	Typically displayed at the top of an explorer. Click to return the explorer to the interface.
	<b>Refresh Explorer</b>	Typically displayed at the top of an explorer. Click to update the explorer after changes have been made to the object you are working with.
	<b>Non-Editable Object</b>	Typically displayed in an object profile or page view. Indicates that the object cannot be edited. The symbol is displayed next to the object information (object name and description).
	<b>Action</b>	Typically displayed in an object profile or page view. Click to open a drop-down menu that allows you to process the object. The options you see depend on the object class you are working with.
	<b>New</b>	Typically displayed in a page view. Click to open a drop-down menu that allows you to create, add, or copy an object. The options you see depend on the page view you are working with.
	<b>Workflow</b>	Typically displayed in an object profile. Click to select a workflow that supports you in carrying out a workflow activity that has been defined for the selected object. Once you select and initiate the workflow via the <b>Workflow</b> button, you must navigate to the <b>My Workflow Activities</b> functionality in order to perform the activity.
	<b>Edit</b>	Typically displayed in an object profile or page view. Click to open an editor in which you can

Button	Name	Action
		define and edit the selected object's attributes in either an editor or custom wizard.
	<b>Notify Authorized User</b>	Typically displayed in an object profile. Click to open a dialog view that allows you to send a notification assignment to the authorized user concerning the selected object.
	<b>Mark as Reviewed</b>	Typically displayed in an object profile. Click to mark the object as reviewed in the case that the object has an inactivity monitor defined for it. All listeners will see that the object has been reviewed and a notification regarding the object's inactivity will not be triggered.
	<b>Audit Trail</b>	Typically displayed in an object profile. Click to open the <b>Object Audit</b> view displaying the change history of the selected object. The view displays the type of change that has occurred, the user making the change, the timestamp of the change, and which property or relation has been changed.
	<b>Publish</b>	Typically displayed in an object profile. Click to publish the object profile in a DOC or PDF format.
	<b>Collaboration Panel</b>	Typically displayed in an object profile or page view. Click to open the collaboration panel to create a new collaboration topic or and display existing collaboration topics about the object or view.
	<b>Export</b>	Typically displayed in page views. Click to export the page view. File formats are displayed in the drop-down menu and may include ZIP, HTML, SVG, XLS, PPT.
	<b>Detach</b>	Typically displayed in page views. Click to detach an object from the selected object.
	<b>Delete</b>	Typically displayed in page views. Click to delete an object from the Alfabet database.

Button	Name	Action
	<b>Navigate</b>	Typically displayed in page views. Click the button to navigate to the object profile of the selected object. You can also double-click an object in view to trigger the navigate button. Please note that the double-click action is reserved only for navigation. If you double-click an object and nothing happens, then navigation is not possible for the object.
	<b>Calculate Indicators</b>	Typically displayed in page views. Click to calculate the indicators for the selected object and displays the results as numbers or icons.
	<b>Clipboard</b>	Typically displayed in page views. Click to save the selected object to a clipboard. The relevant objects can be selected in the <b>My Objects</b> tab in the object selector.
	<b>Configure</b>	Typically displayed in page views. Click to configure the visibility of the columns displayed in data sets.
	<b>Filter Panel Options</b>	Typically displayed in the filter panel in a page view. Click to open a drop-down menu that allows you to hide the filter panel, clear all filter settings, or open a pop-up explaining the purpose of the filter fields.
	<b>Print</b>	Typically displayed in the floating toolbar in a page view. Click to print the view via your browser's print functionality.
	<b>Legend</b>	Typically displayed in the floating toolbar in a page view. Click to open a legend for the view.
	<b>Fit to Window</b>	Typically displayed in the floating toolbar in a page view. Click to adjust the view to your screen
	<b>Original Size</b>	Typically displayed in the floating toolbar in a page view. Click to return the zoom factor to 100%.

Button	Name	Action
	<b>Zoom In</b>	Typically displayed in the floating toolbar in a page view. Click to zoom in and increase the zoom factor.
	<b>Zoom Out</b>	Typically displayed in the floating toolbar in a page view. Click to zoom out and decrease the zoom factor.

## Chapter 4: Creating, Maintaining, and Evaluating Data in Alfabet

Typical tasks that are performed in Alfabet include creating, editing, and maintaining data for objects that you have access permissions to. Any changes you make to objects are saved to the Alfabet database and will be available for any other user having access permissions to the given object. For more information about the concept of access permissions in Alfabet, see the chapter [Understanding Access Permissions in Alfabet](#).

The following information is available:

- [General Information About Objects in Alfabet](#)
  - [Understanding Object Classes and Attributes](#)
  - [Understanding Object Class Stereotypes](#)
  - [Understanding Object Profiles and Object Cockpits](#)
  - [Understanding Reference and Evaluation Data](#)
  - [Understanding Object States](#)
  - [Understanding Release Statuses](#)
  - [Understanding Lifecycles](#)
- [Entering Data in Editors and Wizards](#)
  - [Working with Editors](#)
    - [Defining Text Fields](#)
    - [Defining Object Selector Fields](#)
    - [Defining Checkbox Fields](#)
    - [Defining Combo Box Fields](#)
    - [Defining Checked List Box Fields](#)
    - [Defining Calendar Fields](#)
  - [Working with Wizards](#)
  - [Multi-Language Support in Editors and Wizards](#)
    - [Translating Object Data Manually](#)
    - [Translating Object Data via the Automated Translation Capability](#)
    - [Capturing Data in a Secondary Language](#)
    - [Capturing Data in a Statutory Language](#)
- [Entering Data in Object Profiles and Object Cockpits](#)
- [Creating Objects in Alfabet](#)
- [Detaching and Deleting Objects](#)
- [Analyzing Your Data in Page Views and Reports](#)

- [Defining Filter Settings](#)
  - [Defining Text Fields](#)
  - [Defining Object Selector Fields](#)
  - [Defining Checkbox Fields](#)
  - [Defining Combo-Box Fields](#)
  - [Defining Filters with Two Fields](#)
  - [Defining Calendar Fields](#)
  - [Defining Multiple Selection Combo Box Fields](#)
- [Working with Data in Tabular Datasets](#)
- [Working with Diagrams](#)
  - [Designing a Diagram](#)
  - [Interpreting a Diagram](#)
- [Working with Portfolio Reports](#)
- [Working with Lifecycle Reports and Time Schedules](#)
- [Working with Configured Business Support Matrix Reports](#)
  - [Understanding the Different Types of Customized Business Support Matrices](#)
  - [Defining the Standard Filters in the Configured Business Support Matrix](#)
  - [Creating New Business Supports By Means of the Configured Business Support Matrix](#)
- [Working with Layered Diagram Reports](#)
- [Working with Tree Reports](#)
- [Working with Cluster Map Reports](#)
- [Working with Affinity and Diagram Matrix Reports](#)
- [Working with Radar, Bar, Line and Pie Charts](#)
- [Working with Treemap Reports](#)
- [Executing Your Configured Reports](#)
  - [Adding a Configured Report to the View](#)
  - [Opening a Configured Report](#)
  - [Opening a Configured Report Executed Offline](#)
- [Printing a View in Alfabet](#)
  - [Printing Data in a Table](#)
  - [Printing a Business Graphic, Diagram, or Matrix](#)



- [Printing an Object Profile/Object Cockpit via the Publish Capability](#)
- [Exporting Data](#)
  - [Publishing an Object Profile/Object Cockpit as a DOC or PDF File](#)
  - [Exporting and Saving Data in a Table as XLS or XLSX](#)
  - [Exporting an Object Cockpit or Page View as a DOC or PDF File](#)
  - [Exporting and Saving Data as HTML](#)
  - [Exporting Views with Graphics as HTML+ PNG, EMF, JPEG, or BMP, or as SVG](#)
  - [Exporting Datasets, Diagrams, Matrix Reports, and Gantt Charts as PPT](#)
- [Using the Clipboard Capability](#)
- [Marking the Object as Reviewed](#)
- [Sending an Assignment About an Object to the Authorized User](#)
- [Viewing the Change History of an Object](#)
- [Accessing Existing Publications About Objects](#)

## General Information About Objects in Alfabet

The following terms and concepts are important to understand in order to capture and maintain data about your IT:

- [Understanding Object Classes and Attributes](#)
- [Understanding Object Class Stereotypes](#)
- [Understanding Object Profiles and Object Cockpits](#)
- [Understanding Reference and Evaluation Data](#)
- [Understanding Object States](#)
- [Understanding Release Statuses](#)
- [Understanding Lifecycles](#)

### Understanding Object Classes and Attributes

When you capture data about your enterprise's IT landscape, you are typically capturing data about the objects -- that is, the applications, components, devices, platforms, etc. -- in the IT. Every object in Alfabet belongs to an object class that has a preconfigured set of standard attributes that serve to semantically describe the object class. In order to capture additional data about an object class that might be specific to your enterprise, your solution designer may also have configured custom attributes for the object class.

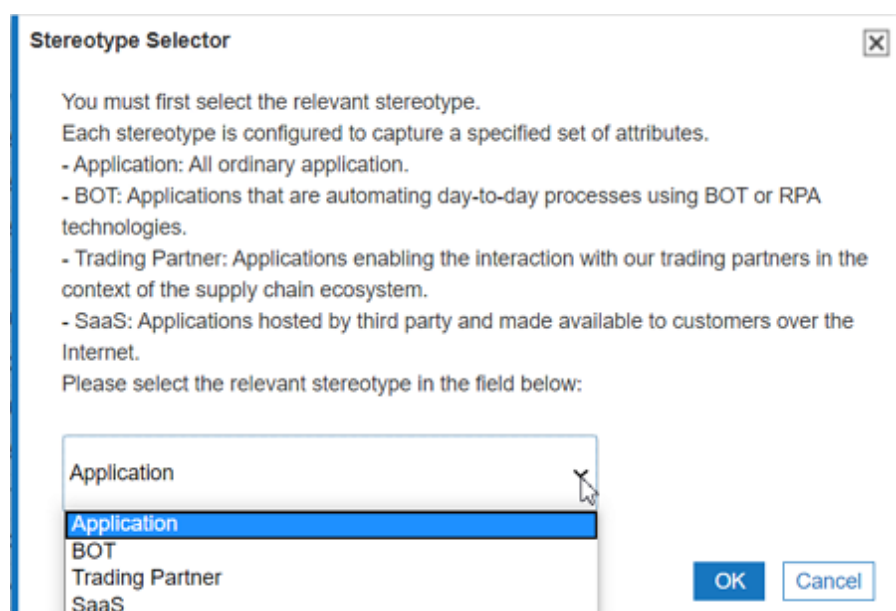


For example, the object class Application has a number of attributes including Name, Description, Start Date, End Date, Object State, Release Status, ICT Object, Required Application Availability, and Committed Recovery Time.

- The attributes Name, Description, Start Date, End Date, Object State, Release Status, and ICT Object are standard attributes.
- The attributes Name, Start Date, and End Date are mandatory and must be defined when the object is created.
- The attribute ICT Object is an attribute for the class Application but it is also an object class with its own set of attributes. The ICT object defined for the application is considered the ICT object that owns the application.
- The attributes Required Application Availability and Committed Recovery Time are custom attributes that the enterprise has configured to capture its compliance data.


## Understanding Object Class Stereotypes

Some object classes will have object class stereotype configured by your solution designer. An object class stereotype is a sub-classification within an object class. By configuring object class stereotypes, it is possible to specify an object class to have multiple class types, each of which captures a specified set of object class properties, reference data, and class configurations. For example, the object class Application might have the object class stereotypes Business Application and Technical Application. The object classes will typically have the same standard attributes available but will each have a different set of custom attributes that capture characteristics specific to, for example, business applications and technical applications.



When you create a new object for an object class for which stereotypes have been defined, a stereotype selector will open in which you must first select the stereotype to use to base the new object on. The stereotype selector will list the possible stereotypes that you can choose from including information configured by your solution designer about the purpose of the stereotype. The **Stereotype Selector** lists the possible object class stereotypes for the selected object class. The **Stereotypes** attribute is thus specified for the object via the selection in the **Stereotype Selector**. Once the selector is closed, the relevant editor will

open and you can continue to define the new object. The defined object can then be viewed in the relevant custom object view configured for the object class stereotype. The **Stereotypes** attribute must be specified whenever an object is created that is based on an object class for which object class stereotypes are configured.

The object class stereotype that an object is based on can be changed if a **Change Stereotype** button is available in the toolbar of the relevant object profile. You can select the object class stereotype that you want to base the object on in the drop-down menu. You can then click the **Edit**  button to specify any relevant custom attributes configured for the object class stereotype that the object is now based on.



Please note that the **Change Stereotype** button will not be available for the following object classes: **Application, Component, Domain, Feature, ICT Object, Organization, Project, Resource, Service Product, Service Product Item, Standard Platform, Technical Service, Technical Service Operation, Technical Service Operation Method, and Value Node, and Vendor Product.**

## Understanding Object Profiles and Object Cockpits

In general, each object class in Alfabet has a standard object profile that contains a standard set of page views available that allow an object to be defined and evaluated. The object profile also serves as a kind of fact sheet or data record that displays the most important information about the object you are working with.

Your solution designer may also configured object cockpits that display specific set of attributes and views that are relevant for a specific issue about the object. For example, for the object class Application, a cockpit Recovery and Resolution Planning or Architecture Planning might be configured for your solution designer. If object cockpits have been configured for your user profile, you will see them available as tabs above the toolbar in the object profile.

Object data can either be captured by editing scalar attributes directly in the object profile or object cockpit or via the object's editor available via the **Edit** button in the toolbar of the object profile. Further data can also be captured in the views available in the object profile and object cockpit. The solution designer may customize a standard object profile so that some views are hidden for your user profile or that non-standard configured reports are visible for your user profile.

## Understanding Reference and Evaluation Data

Some of the data that you need to capture, such as indicators, will depend on the configuration of evaluation data. However, the indicators that you assess for applications might differ than the indicators you might assess for projects. In Alfabet, a users with access permissions to the **Configuration** functionalities in the Alfabet user interface can configure evaluation types, indicator types as well as roles and cost types that are needed in enterprise and assign them to the relevant object classes. Users will see the reference or evaluation data in the relevant views for the object classes that they have been assigned to. This includes the following:

- Evaluation types and indicator types that allow you to capture a specific dimension of an object's performance. For example, the object class Application might have the evaluation types Application Protection Requirements, Business Relevance and Business Value assigned to it and the object class Component may have the evaluation types Technology Rating and Performance assigned to it. In

this case, users will only see the evaluation types Application Protection Requirements, Business Relevance and Business Value in the Evaluation page view for an application and only Technology Rating and Performance will be displayed in the Evaluation page view for a component.

- Cost and income types that allow you to classify the costs and earnings of projects as well as operational cost types that are relevant to track costs for applications, ICT objects, deployments, and service products. Cost types and income types are displayed in the relevant cost planning views as well as in the views targeting a project's business case.
- Role types that allow responsibilities for objects to be defined. A role defines the functional relationship or responsibility that a user or organization has to an object. For example, the role type Architect might be available for the object class Application and the role type Operator might be available for the object class Device. Roles are defined for informational purposes only and provide detail about users or organizations that may have information about or a stake in the object. Roles are defined in the Responsibilities page view. The definition of a role for an object does not impact access permissions.

Reference and evaluation data is configured in the **Configuration** functionalities in the Alfabet user interface. For more information, see the reference manual *Configuring Evaluation and Reference Data in Alfabet*.

## Understanding Object States

An object state describes the operational status of an object in the enterprise. The object state indicates whether an object is actively used, planned to be used, or has been used in the past. Because an object's start and end dates specify the planned period of activity for the object, the object state should be changed from **Plan** to **Active** once the object's start date is reached. Equally, the object state should be changed from **Active** to **Retired** when the object's end date is reached. If the lifecycle concept is available for an object class the object's start and end dates will initially be aligned with the active period of the object.


An object's object state can be changed by a user with Read/Write access permissions. For objects like applications or components, relevant object dependencies must be taken into consideration when the object state is changed. For applications, for example, the user changing the object state should consider whether the object state should be propagated to the application's associated information flows or business supports.

If the object state can be defined for an object, you will see the **Object State** field in the object's editor. An object state must be defined for an object if this field is available. Typically, a default object state has been configured so that when you create a new object, the field is automatically filled in. For some object classes such as Application and Component, the object state cannot be changed in the editor but can only be changed by means of the **Change Object State** button in the toolbar of the object's profile. The standard object states are **Plan**, **Active**, and **Retired**, although the names of these object states may be modified by your solution designer.



The names of the object states are configured by your solution designer in the configuration tool Alfabet Expand. For more information, see the section *Configuring Object State Definitions for Object Classes* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Understanding Release Statuses

A release status describes the state of approval for or agreement about an object in the enterprise. An object's release status can be changed by a user with Read/Write access permissions. For all release statuses that are configured as non-editable release statuses (for example, a retired status), users will not be able to edit the attributes in the object's editor nor be able to edit the object's relationships in the object's page views. Users will see the  icon at the top of the object profile of an object that may not be edited due to its current release status definition.

If the release status can be defined for an object, you will see the **Status** or **Release Status** field in the object's editor. Typically, a value must be defined for an object if this field is available. A **Status** field is usually used to capture the release status attribute for objects such as assignments, demands, and projects whereas a **Release Status** field is usually displayed for architecture-related objects such as applications, components, and deployments. Release status definitions may be differently configured for different object classes depending on their context in Alfabet. The number of statuses defined for an object class is determined by the needs of your enterprise. For example:

- Assignments might have the status definitions **Created, Accepted, In Progress, Work Completed, Returned, Re-Assigned,** and **Closed**.
- Architecture-related objects like applications or components might have the status definitions **Draft, Under Review, Approved, Archived, Returned, Re-Assigned,** and **Closed**.
- Planning-related objects like projects might have the status definitions **New, Created, Supported, Endorsed, Pre-Approved, Approved,** and **Rejected**.

For more information about objects that implement an approval process, see the section *Configuring Release Status Definitions for Object Classes* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Understanding Lifecycles

Many objects in Alfabet have lifecycles that can be defined and updated by users.

A lifecycle describes the succession of stages that an architecture element goes through. Many objects (for example, applications, components, standard platforms, business supports) in Alfabet have a lifecycle, although a lifecycle does not have to be defined for all objects. A lifecycle is comprised of lifecycle phases that describe the object's status of activity or production over time. Each lifecycle phase is aligned with its preceding and succeeding lifecycle phase.

The lifecycle definition also includes the definition of the object's active period. The active period of an object is considered the period that the object is in production. Therefore, the active period of an object corresponds to the object's start and end dates. The active period may be configured to be aligned with one or more specified lifecycle phases that represent the period when the object is in production. Typically, the object state of the object will be specified as Active in the period between the start and end date.

The lifecycle definitions of dependent objects should be aligned with the lifecycle of the object that they have been defined for. For example, the lifecycles of any local components, information flows, and business supports should be aligned with the lifecycle of the application that they are assigned to. In the case of components, the lifecycles of any local components, information flows, and technical services should be aligned with the component's lifecycle.

Furthermore, the lifecycle definition for an application may include the specification of predecessor and successor versions and the lifecycle definition of components may have successor versions. Successor versions will be assigned per default to the same ICT object as the original application/component, but this can be modified, as needed.

The start and end dates of an object's active period are typically defined in the editor of the relevant object. The object's active period can then be viewed and the individual lifecycle phases defined in the *Lifecycle Page View*.




For more information about the methodology of lifecycle management of the application architecture, see the section *Lifecycle Management* in the reference manual *IT Planning Basic*.

For more information about the configuration of lifecycle phases for object classes, see the section *Configuring Lifecycle Definitions for Object Classes* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Entering Data in Editors and Wizards

When you create or edit an object, you will do so in either an editor, which allows you to define the basic attributes relevant to the object, or a wizard, which guides you through a series of steps that allow you to define the object in more detail than is possible in just an editor. Typically, the editor will be embedded as the first step in the wizard, followed by additional views to collect, evaluate, or analyze data. For example, an application wizard might include a step to create the application (in the editor) followed by steps to define the application lifecycle (embedded **Lifecycle** page view), to specify the business services it supports (embedded **Business Services** page view), and to define its information flows (embedded **Information Flows** page view).

Whether an editor or wizard opens when you create or edit an object will depend on your solution configuration. The configured editor or wizard will open when you select the **Create <Object>...** option to create a new object or the **Edit**  button to edit an existing object. The modal windows that open when an editor or wizard is opened can be resized, as needed.



If uniqueness constraints have been configured for a combination of attributes for an object class, the combination of attributes must be unique for all objects in the object class. If a new object is created and a unique key violation occurs, a warning message will be displayed providing a link to the object that is the source of the violation. You can click the link to open the relevant object view in order to understand more about the conflicting object. This object view will be opened in another browser tab in order to leave the current work environment undisturbed.

Depending on the configuration of your Alfabet solution, object data such as names, descriptions, and other relevant custom properties may be captured in the enterprise's primary language, any of its secondary languages, or in a statutory language that is mandated for relevant object classes. If the enterprise supports multiple languages, the data captured for protected and custom properties of the type `String` and `Text` may be translated to the other languages implemented in your Alfabet solution. When the user interface is rendered in a one of the languages for which translations are available, the translated names of objects will be displayed in explorers, object profiles, page views, previews, etc. Objects with names defined in a secondary language will be ordered accordingly in explorer trees and page views.



If data translation is supported for the class **Business Process**, a user could capture the **Name** and **Description** of their business processes in the primary language. The same user or other users with access to the business processes could then either manually provide a translation for the names and descriptions of the business processes in the editor/wizard or, if the automated translation capability is configured, the data can be translated via a translation service to the languages supported by the enterprise.



Custom editors and custom wizards are configured by your enterprise's solution designer in the configuration tool Alfabet Expand. For information about configuring a custom editor, see the chapter *Configuring Custom Editors* in the reference manual *Configuring Alfabet with Alfabet Expand*. For more information about configuring uniqueness constraints, see the section *Configuring Class Keys for Object Classes* in the reference manual *Configuring Alfabet with Alfabet Expand*.

The following information is available:

- [Working with Editors](#)
  - [Defining Text Fields](#)
  - [Defining Object Selector Fields](#)
    - [Using the Simple Search](#)
    - [Using the Browse Search](#)
    - [Using the My Objects Search](#)
  - [Defining Checkbox Fields](#)
  - [Defining Combo Box Fields](#)
  - [Defining Checked List Box Fields](#)
  - [Defining Calendar Fields](#)
- [Working with Wizards](#)
- [Multi-Language Support in Editors and Wizards](#)
  - [Translating Object Data Manually](#)
  - [Translating Object Data via the Automated Translation Capability](#)
  - [Capturing Data in a Secondary Language](#)
  - [Capturing Data in a Statutory Language](#)

## Working with Editors

Each object class has a standard editor that allows you to consistently capture data across objects in a class. The editor may include additional tabs that have been configured by your solution designer to capture enterprise-specific data.

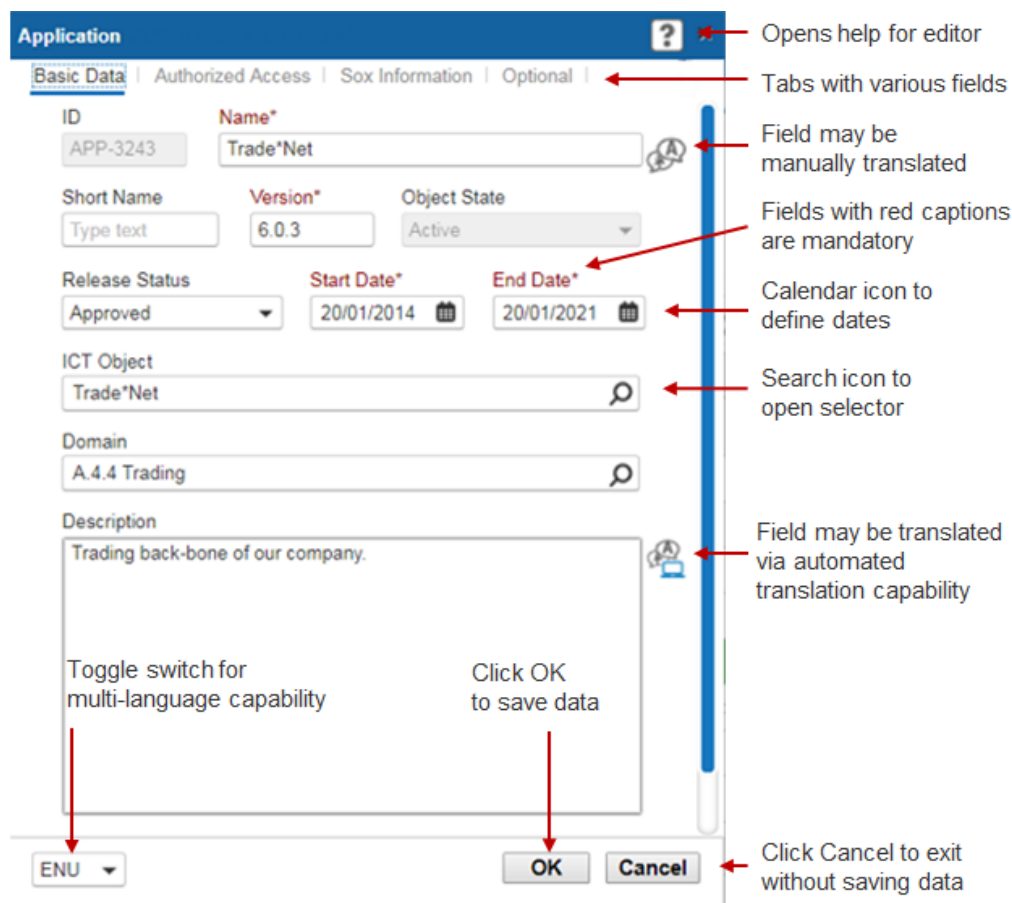


FIGURE: Example of an editor with a traditional layout

The editors may be displayed in a traditional layout, as shown in the image above, or in a more streamlined stack layout shown below which structures the fields in a flat list in the editor at runtime. If you see the stack layout in an editor, please note that each tabbed page of the editor will be displayed as an expandable/collapsible section that, when expanded, displays the interface controls available in the tabbed page. Depending on the configuration of your solution, the tooltips for each field may be displayed directly in the editor. For more information about configuring the layout of standard and custom editors, see the section *Specifying the Rendering Definition of the Custom Editor* in the reference manual *Configuring Alfabet with Alfabet Expand*.



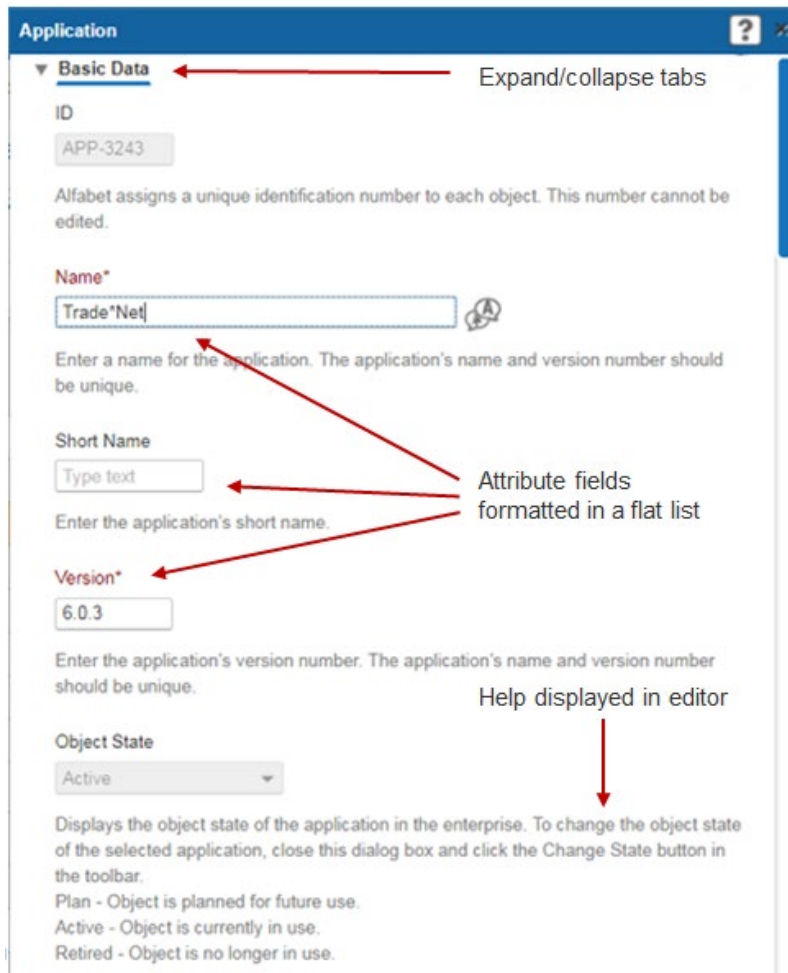






FIGURE: Example of an editor with a stack layout

The example above shows many of the interface elements that you will encounter when you define an object's data in an editor. Please keep the following in mind when defining data as well as filters and selectors:






- Each editor field provides cursory information in the field about how to define the data.
- You can either search for an object in the object selector by clicking the **Search**  symbol or you can begin to enter the name of an object. A list of potential matches will be displayed in a list and updated with each additional letter typed in the field. The object must be explicitly selected in the drop-down list for the data to be entered in the field.
- Fields with a red star next to the caption are mandatory and must be filled in. If you do not enter data in a mandatory field, you will see a prompt message asking you to do so.
- Grey fields display data that is automatically generated. These fields cannot be edited.
- White fields without a star next to the caption are optional. You may enter data, as needed.
- The possible release status, object states, and enumeration values that may be defined in an editor file will be displayed in a tooltip when you point to the respective editor field.
- For some classes, class keys (uniqueness constraints) may be configured that specify that a combination of attributes must be unique for each new object. If a class key violation occurs when a user attempts to create a new object, a warning message will open listing the attributes that caused

the violation to the defined uniqueness constraints as well as a link to the existing object that is the source of the violation. The user can click the link to open the configured object view specified for the associated class setting in order to understand more about the conflicting object.

- In some browsers such as in Microsoft® Internet Explorer® 11, copying text from a PPT file to paste into a text field (such as a **Description** field) in an editor in Alfabet may result in an error due to invalid characters. If this is the case, you should contact your system administrator to ensure that the server alias is configured to clean invalid characters. For more information, see the section *Basic Configuration of the Alfabet Components* in the reference manual *System Administration*.
- The formatting of dates (for example MM/DD/YYYY vs. DD.MM.YYYY) is determined by the cultures defined for the interface that you are currently using. The date format required to correctly define editor and date fields in editors and filters will be included in the tooltips of those fields. For more information about specifying the language to display in the interface, see the section [Defining the Language of the User Interface](#).
- The editor will open in the current user interface language. The language selector in the lower left corner of the editor may be changed in order to translate specified fields to a secondary language.
- Icons may be displayed next to some fields to indicate that the data may be translated to a language supported by your enterprise. The following may be displayed:
  - **Manual Translation** : This field may be manually translated. Select a language in the language selector at the bottom of this editor/wizard and enter the translation in this field.
  - **Automated Translation** : This field will be translated to all secondary languages via the automated translation capability. The automated translation is triggered when the editor is closed or the wizard advances to the next step.
  - **Disable Automated Translation** : This field will not be translated for this object via the automated translation capability. It may be manually translated. Select a language in the language selector at the bottom of the editor/wizard and enter the translation in this field.



For more information about translating object data, see the section [Multi-Language Support in Editors and Wizards](#).

- Various types of help may be available in the editor, depending on the configuration of the solution:
  - Help buttons may be available for individual fields in the editor. Click the button to display the help for the editor field.
  - A **Help**  button will be displayed in the upper right corner. Click the **Help**  button to access a **Help for Editor** window providing information about the fields displayed in the currently selected tab. Click anywhere outside of the **Help for Editor** window to close it.  
Switch to another tab in the editor and click the **Help**  button to access information about the fields in that editor tab. If hints have been configured for custom attributes displayed in the editor's tabs, help texts will also be displayed for these attributes
- Editors and wizards can be maximized to fit the user's screen so that complex editors with many tabs or datasets embedded in a wizard can be more easily viewed and handled. A maximize  or minimize  icon is displayed in the upper right corner of editors and wizards. Editors can also be

resized to fit the full screen via a double-click action in the header of the editor. A double-click in the header of the maximized editor will return it to the default size and position.

In many of the fields in editors, you will simply enter text such as a name, short name, or version number. However, you may also encounter the following data entry fields in an editor:

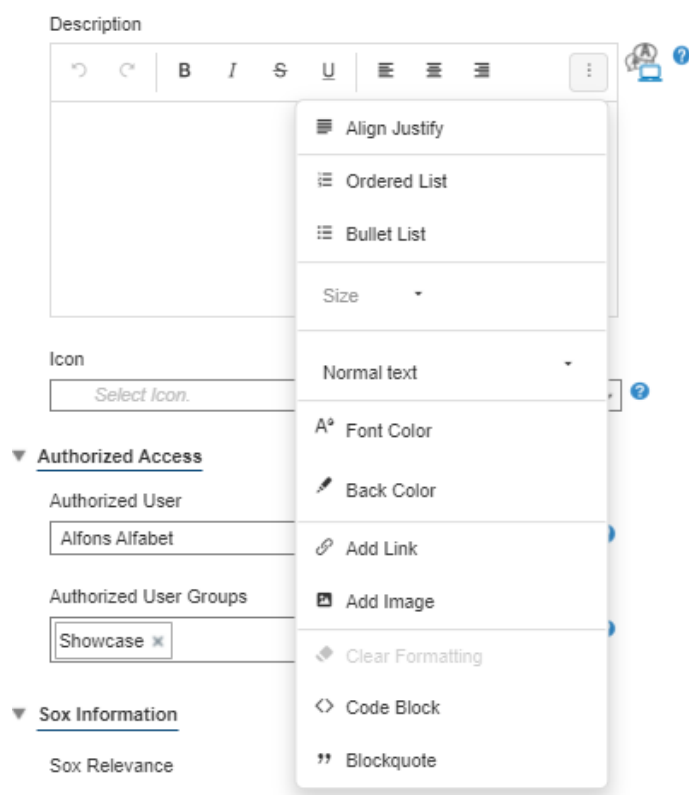
- [Defining Text Fields](#)
- [Defining Object Selector Fields](#)
  - [Using the Simple Search](#)
  - [Using the Browse Search](#)
  - [Using the My Objects Search](#)
- [Defining Checkbox Fields](#)
- [Defining Combo Box Fields](#)
- [Defining Checked List Box Fields](#)
- [Defining Calendar Fields](#)

### Defining Text Fields

Many of the fields available in editors are text fields in which you simply type in the text. This is typical for editor fields with the caption **Name**, **Short Name**, or **Description**.

Recovery Time Capability [h]

Depending on your solution configuration, some text fields may provide an embedded HTML editor.



The HTML editor provides a toolbar as well as a drop-down menu with formatting options. HTML text can be copied, for example, from a website and pasted to the HTML editor in the editor. Images cannot be embedded in the HTML editor.



Please note the following regarding the use of the embedded HTML editor:

- The HTML editor must be made available by your solution designer. Depending on the solution configuration, the HTML text defined in the editor will be displayed in object profiles and object cockpits. However, previews and reports will display the ASCII representation of text property values. For more information, see the section *Adding a Text Box to Capture ASCII and HTML in the Custom Editor* in the reference manual *Configuring Alfabet with Alfabet Expand*.


Icons may be displayed next to some fields to indicate that the data may be translated to a secondary language supported by your enterprise. For more information about translating object data, see the section [Multi-Language Support in Editors and Wizards](#).



Object data should be captured by users in the language of the culture that is defined as the primary culture. In other words, users should specify such information as names and descriptions of new objects in editors in the primary language, regardless of the current language displayed in the Alfabet user interface. If object data is not first captured in the primary language, language inconsistencies may occur in the user interface.

### Defining Object Selector Fields

Many of the tasks in Alfabet require you to select an existing object in an object selector in order to define a reference between objects. For example, if you are defining an application, you may need to assign the application to an ICT object in the context of the Application editor. If a reference to an object shall be defined

in an editor, the **Search**  symbol will be displayed next to the fields that provides an object selector to find the object. You can also enter the name of the object directly in the field. You may encounter an object selector when you define filters or editor fields, or when you create a relationship between objects in a page view.



When you want to assign a user to an object (for example, as a deputy or proxy), you will use a person selector. Depending on the configuration of your solution, the person selector may display the named users in the Alfabet database or may access an external database such as LDAP to retrieve the users. The object selector and the person selector are similar in their operation and handling.

The screenshot shows the 'ICT Object(Selector\_StandardSelector)' window. At the top, there are three tabs: 'Simple', 'Browse', 'Full-Text', and 'My Objects'. Below the tabs is a search pattern input field and a dropdown menu for search criteria. A table below displays search results with columns: ID, Short Name, Name, Stereotype, Status, and Object State. Row 11 is highlighted. At the bottom right, there are pagination controls showing 'Page 1 of 3, Count: 264' and 'OK' and 'Cancel' buttons.

There are a number of different methods available in an object selector to find the objects that you are looking for: The standard tabs are:

- **Simple:** Allows you to define filters and display the results in a table.
- **Browse:** Allows you to browse through a tree hierarchy to find the object you are looking for.
- **My Objects:** Allows you to select objects that have been saved to the clipboard. For general guidelines about the clipboard search, see [Using the Clipboard Capability](#).

The tabs available in the object selector may vary depending on the object class you are searching in or whether custom selectors have been configured for the object class. Your enterprise may have configured custom search selectors for some of object classes. Custom selectors assigned to a class setting will globally replace the standard selector except when a standard selector is required.

It is highly recommended that you read the sections below in order to understand the general functionalities that may be available in your customized search capability. If questions or errors should arise in your use of a custom search capability, please contact your enterprise's solution designer.



Please note that if the object that is needed as the target of a reference is not available in the Alfabet database, it may be possible to create the missing object on an ad-hoc basis. If the solution designer has configured this capability for the object class you are searching in, you will see the **Add Missing <Class.Caption>** button in the selector. When you click the **Add Missing <Class.Caption>** button, the configured functionality, explorer, configured report, or standard view will open in which you can create the new object will open in a separate browser tab. Once the missing object has been created, the user can return to the original browser tab with the object selector and search in the selector for the new object. For more information about the configuration requirements for the **Add Missing <Class.Caption>** button, see the section *Configuring Class Settings for Object Classes and Object Class Stereotypes* in the reference manual *Configuring Alfabet with Alfabet Expand*.

The following information is available:

- [Using the Simple Search](#)
- [Using the Browse Search](#)
- [Using the My Objects Search](#)

### Using the Simple Search

The **Simple** tab allows you to define filters and display the results in a table. This functionality allows you to conduct a search based on criteria that you enter. For example, if you know the first few letters of the object's name, you can enter this information. You can also select other standard object class properties and/or custom properties to include in the search criteria.

The search criteria you define is stored per object class so that the next time you search for the same object class in the object selector, the search terms will be displayed. The search terms are persistent for later user sessions or if you change to a different user profile.





For performance reasons, the return set for any search is limited to 300 objects. If more than 300 objects are found, the search criteria should be refined. Otherwise, the object(s) you are looking for may not be included in the return set.

To conduct a simple search:


- 1) In the **in** field, select the attributes that should be searched. The search capability searches all searchable properties listed in the **in** filter by default. However, you can narrow the search criteria by specifying one or more attributes. For example, you could select Name in the drop-down list to base a search on a name or part of a name defined for your objects. Click the arrow symbol to open the drop-down list. Set a checkmark next to one or more attributes or click the **Select**

**All**  button to select all attributes. You can remove a checkmark by clicking it click the **Clear**


**All**  button to remove the checkmark from all attributes. Click the **Accept Selection** button  to confirm your selection or click the **Revert Selection**  button to close without making the selection.

2) In the **Search Pattern** field, enter additional search criteria to be searched in the properties selected in the **in** field. Please note the following guidelines:

- If you enter the full name of an object, it must be spelled correctly
- If you do not know the full name of an object, you may use the \* symbol as a wildcard character. For example, to find all applications beginning with the letters ABC, enter ABC\*, enter \*ABC to find applications ending with ABC, or A\*BC to find applications containing the letters ABC.

 Depending on the configuration of the standard search functionalities, the wildcard \* symbol may be automatically implemented. In this case, you do not need to enter the wildcard in the **Search Pattern** field. A message will be displayed in the header panel of the **Simple** tab if the wildcard is automatically implemented and thus not required. The configuration of the automatic implementation of the wildcard is configured in the configuration tool Alfabet Expand. For more information, see the section *Configuring the Wildcard for Standard and Custom Search Functionalities* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- Use the operator **AND** to search for an object containing both of two terms. For example, entering ABC **AND** OptiRetail returns all objects with both terms ABC and OptiRetail.
- Use the operator **BETWEEN** <date> <date> or **BETWEEN** <number> <number> to search for custom attributes with values in a specific range. Be sure to use the date conventions for the culture implemented for your solution.

 You can only search for dates, integers, and real numbers that have been defined for custom attributes. It is not possible to search the standard attributes Start Date and End Date.

- Use the operators <, <=, >, >=, = to specify values for integers and real numbers for custom attributes.







 The format for search criteria using operators is:

"<operator>\_<value>"

where \_ is a whitespace. The whitespace is mandatory.



- The characters % and \_ should be escaped because some databases regard these characters as wildcards. The % and \_ can be escaped by used square brackets [ ].
- A validation of the search pattern you specify will be performed. The search pattern will not be applied to any of the selected search attributes if the search pattern does not match the type of the search attribute. (For example, if you select a custom property for which an integer must be entered as a value but you enter text in the **Search Pattern** field, the custom property will automatically be dropped from the list of search attributes).

3) Click the **Search** button to execute the search based on your settings. Please keep the following in mind:

- Click and hold on any object in the results list to open a preview about the object. Click anywhere outside of the preview window to close it.
  - The number of results found by the search will be displayed in the header of the results table. Up to 300 objects may be found in the search. Each page in the results will display 100 results.
  - To navigate forward to the next page of results, click the **Next Page**  button.
  - To navigate forward to the last page of results, click the **Last Page**  button.
  - To navigate back to the previous page of results, click the **Previous Page**  button.
  - To navigate open to the first page of results, click the **First Page**  button.
  - Depending on the context in which you have opened the object selector, it may be possible to select multiple objects in the object selector. If this is the case, use CTRL + click to simultaneously select multiple objects in a page. Multiple objects can only be selected on one page at a time in the object selector. If you click the **Next Page** , **Last Page** , etc. buttons, your selection will be lost.
- 4) Select the relevant object and click the **OK** button.

### Using the Browse Search

The **Browse** functionality allows you to browse through an object hierarchy to find the object you are looking for. For example, you could search for a specific domain by searching through the hierarchical structure of domains defined for your enterprise. Not all object classes listed in the **Search For** field can be meaningfully searched in the **Browse** functionality. The browse functionality requires that you search for an object by means of an explorer structure. Therefore, the object must be structured in an object hierarchy in order to be found via the browse. All available hierarchies will be displayed in the explorer.

- 1) Select the object class that you want to search for in the **Search For** field and click the **Browse** tab. If only one object class can be selected, the class will already be displayed in the **Search For** field and the filter cannot be defined. If object class stereotypes have been configured for your enterprise, the stereotypes will be displayed in the **Search For** field. However, if you select an object class stereotype for which no object has been defined on the root level of the object class stereotype hierarchy, then no results will be displayed in the **Browse** tab. For example, the object class Domain has the object class stereotypes 1) Area, 2) Sub-Area, and 3) Domain. If you select Sub-Area in the **Search For** field and no objects for the stereotype Area have been defined, a browse hierarchy cannot be displayed and thus no results will be displayed.
- 2) Browse through the hierarchy to locate the object you want. Click  to expand the explorer and click  to collapse it.
- 3) Click and hold on any object in the explorer to open a preview about the object. Click anywhere outside of the preview window to close it.
- 4) Select an object and click the **OK** button.



## Using the My Objects Search

The **My Objects** tab allows you to view and select objects in relevant object classes that have been saved to the clipboard. The clipboard functionality is available in views where it is useful to copy data. It allows you to save objects to a clipboard and then easily access them later in the **My Objects** tab. If you have not copied any objects to the clipboard, the **My Objects** tab will be empty.

Any data saved to the clipboard will remain in the clipboard for the current user session. The clipboard contents are cleared when the Alfabet session is ended. For more information about how to use the clipboard functionality, see the section [Using the Clipboard Capability](#).

To select objects in the **My Objects** tab:

- 1) In the selector, click the **My Objects** tab.
- 2) Click and hold on any object in the explorer to open a preview about the object. Click anywhere outside of the preview window to close it.
- 3) Select an object and click the **OK** button.

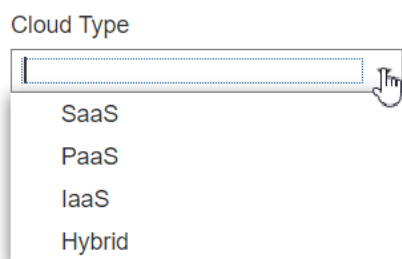
## Defining Checkbox Fields



Checkboxes serve as a means to capture a `True/False` value. Setting a checkmark in the checkbox indicates the value `True`. If a checkbox is selected, you can clear the setting and set the value `False` by clicking the checkbox and removing the checkmark.

## Defining Combo Box Fields

Many fields in Alfabet are defined by means of a drop-down list. The drop-down list may be blank the first time you encounter it. Click the arrow to open the drop-down list. You can select any of the options available. If the first line in the list is blank, you can select the blank line if no value should be defined.




## Defining Checked List Box Fields

A checked list box field allows a user to select multiple values by setting a checkmark next to each relevant value. The field will automatically display a vertical scroll bar if the list of available values (determined by the enumeration defined) is too long for the standard box.

If the editor is rendered in a stacked layout, an auto-complete function will be available in **Authorized User Group** editor fields and may be available if the checked list box field has a significant number of entries. You can either select the object in the drop-down list or enter text in the field. A list of potential matches will be displayed in a list and updated with each additional letter typed in the field. The object must be explicitly selected in the drop-down list for the data to be entered in the field. The editor field will increase in size to display all selected objects in the field.

### Defining Calendar Fields

Date filters usually display a **Calendar**  symbol. You can either enter a date in the field or click the **Calendar** symbol to open a drop-down calendar. The date format required to correctly define editor and date fields in editors and filters will be included in the tooltips of those fields.

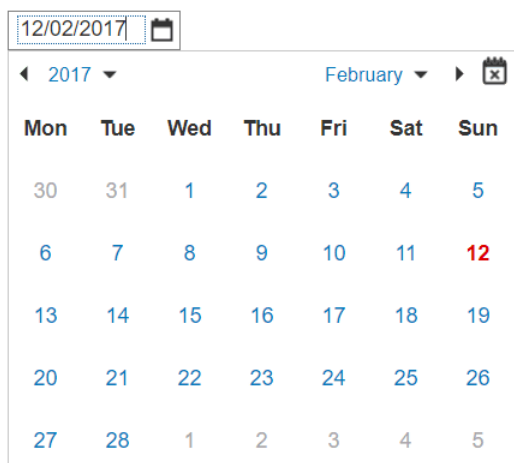


Please note that the dates in editor fields are always displayed as a numeric value, regardless of the configured date format. For example, the date format 22 August 2006 displayed in the object profile will be displayed as 22/08/2006 in the editor field.





The formatting of dates (for example MM/DD/YYYY vs. DD.MM.YYYY) and numbers is determined by the culture used to render the interface. Please note that the culture configuration supersedes the regional settings of the client machine. For more information about specifying cultures, see the section *Specifying the Cultures Relevant to Your Enterprise* in the chapter *Localization and Multi-Language Support for the Alfabet Interface* in the reference manual *Configuring Alfabet with Alfabet Expand*.

Start Date\*



When you open the calendar, you will see the current date highlighted in red. You can do the following:

- Click a date to select it. The date will be automatically displayed in the date field.
- Click  to move forward one month.
- Click  to move back a month.
- Click the arrow next to the name of the month to open a drop-down list with all of the months. Select a month from the list.

- Click the arrow next to the year to open a drop-down list with years. Select a year from the list.

## Working with Wizards

The screenshot displays the 'Device Wizard (Wizard.DVC\_Wizard)' interface for a device named 'DVC-12 IBM System 3550 1'. The wizard is divided into five numbered steps:

- Step 1 of 5: Basic Data**: 'Please enter the basic data of the device.' Fields include ID (DVC-12), Short Name, Release Status (Approved), ICT Object, Location (\* Server Room A), Physical Dev (checked), and Description.
- Step 2 of 5: Responsibilities**: 'Please enter at least one Architect. Click to access help for this wizard step.' Includes a 'Person' selection dropdown with roles like Architect and Operator.
- Step 3 of 5: View Lifecycle**: 'Please enter the device lifecycle. Select each lifecycle phase that should be displayed. The time bars below visualize.' Includes an 'Evaluation' chart with phases: Pilot, Production, Limited Production, Retired - Shut Down, and Active Period.
- Step 4 of 5: Information Flows**: 'Please add the information flows of the device. Click to access help for this wizard step.' Includes a 'New' button and a list of flows (e.g., Router 1, Sun Server - Fire Wall, Windows 2000 Server, IAS Server IBM 2.7).
- Step 5 of 5: Attachments**: 'Please add some attachments describing the device in further detail. Click to access help for this wizard step.' Includes a table of attachments:
 

Name	Change Date
1 CC_Corporate_FI-CO.pdf	04/04/2010
2 Requirements Spec.doc	03/09/2013

FIGURE: Example of the steps in a wizard designed to capture data about devices

A wizard is an assistant that consists of a configured set of wizard steps that may include standard editors, custom editors, standard views, and configured reports. The wizard will typically guide a user through a linear multi-step process to capture data for an object that the user has access permissions to.

Standard data capture wizards are available for commodity classes in which a large number of objects are typically documented. An unlimited number of custom wizards may be configured for an object class in order to allow different users working in different contexts to capture the object data that they are responsible for. However, only one wizard may be available for an object class per user profile.

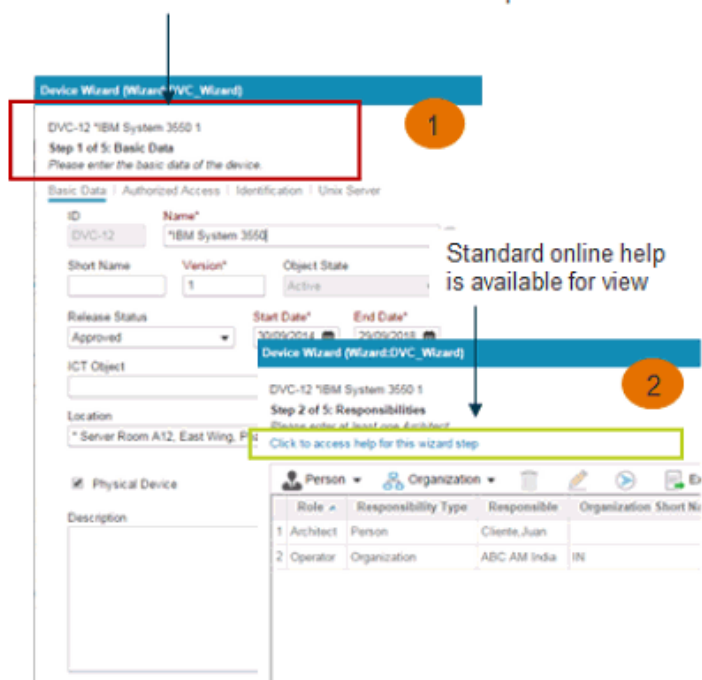
Keep the following in mind when working with a wizard.

- If a wizard has been configured for the selected object class and is accessible to the user profile that the user is logged in with, the custom wizard will open when the user clicks the **Edit** button in the object profile. Depending on the configuration of your Alfabet solution, you might work with a wizard when editing objects in one object class, but might see an editor when working with objects in a different object class.

- The wizard process cannot be executed for a selected object if the object has a non-editable release status. For more information about the role of release statuses regarding access permissions, see the chapter [Understanding Access Permissions in Alfabet](#).

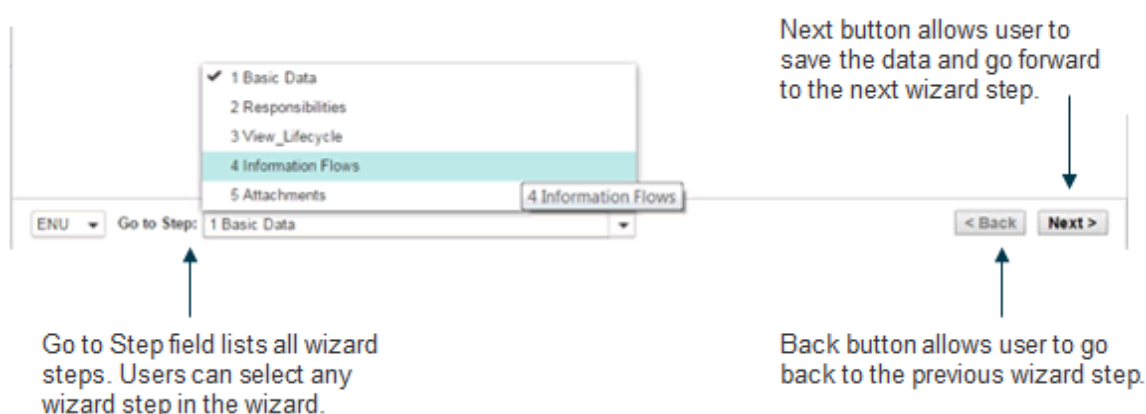
Header displays:

- Object class and object data
- Current wizard step vs. total number of steps
- Basic instructions for current wizard step



- In the white pane at the top of the wizard, you will see the caption for the current wizard step and text with basic instructions describing what you must do in the current wizard step, and, if relevant, information about the existing object you are defining.
- An editor is typically embedded in the wizard. The guidelines provided in the section [Working with Editors](#) also applies to editors embedded in wizards.
- Mandatory fields in an editor must be completed in order to save the data and proceed to the next wizard step. If a wizard cannot advance to the next wizard step because mandatory properties have not been defined, an error message will list the mandatory properties that must be defined in order for the wizard to proceed to the next step.
- Texts displayed in read-only text boxes and memo fields in editors and wizards can be copied and pasted to other text boxes and memo fields in the Alfabet user interface.
- Icons may be displayed next to some fields to indicate that the data may be translated to a secondary language supported by your enterprise. For more information about translating object data, see the section [Multi-Language Support in Editors and Wizards](#).
- Click the F1 key to open the online help for the editor displayed in the wizard. Click the blue help link to open the context-sensitive help for the standard page views embedded in a wizard. A Help link may also be available for configured reports if your solution designer has defined custom Help for the report.

- If the size of the wizard is decreased, the captions of the toolbar buttons will be dropped if the size of the wizard window is too small to display them. If the screen is sized even smaller, the toolbar button icons will be dropped starting with the button furthest to the right.
- Wizards can be resized to fit the full screen via a double-click action in the header of the wizard, making it easier to work with large wizards with multiple tabs. A double-click in the header of the maximized wizard will return it to the default size and position. Please note that quality widgets will not be viewable if a wizard is maximized to fit the full screen.
- Quality widgets may be configured for wizards or individual wizard steps to provide information to the user such as the completeness of the underlying data of an object and may even provide a link to a view that allows incomplete data to be updated. The quality widget may either be a configured widget report, Gantt chart report or a configured business chart report that provides additional information to the user such as the completeness of the underlying data of the object associated with the object cockpit or configured report. When the user opens the wizard/wizard step, the quality widget will be attached to the right-hand edge of the wizard and will stay attached to the wizard if it is resized or repositioned. If the configured report opening as quality widget provides navigation, the navigation target will open in a new tab in the browser. The user could thus update data in this view and reload the original view to display the updated data. The quality widget will remain open until the user clicks outside of the pop-up window or clicks the close button.



Captions on the wizard buttons in your Alfabet solution are configurable and may differ from the standard captions described in this documentation.

Each wizard step typically constitutes one screen with preconfigured buttons that control the wizard process. The following information explains the general behavior that is triggered by the buttons as well as additional information that will help you understand possible consequences if post-conditions are configured for a wizard step. The **Next** button and **Exit** button are preconfigured by Software AG and will be displayed per default. The **Back** button and **Go to Step** button are optional and must be configured to be displayed in the wizard.

A wizard step may have pre-conditions or post-conditions defined in order to validate whether data has been entered for a wizard step. Thus, depending on the configuration, it may be mandatory or desired that specific data is completed for a wizard step. Please note that any post-conditions that have been configured for that wizard step will be executed AFTER the data has been saved in the wizard step. This is of particular relevance for post-conditions defined for editors. The first database transaction will attempt to save the data that has been defined in the wizard step. However, this may fail if mandatory or uniqueness conditions are violated. Such errors must first be resolved before the system can check the post-conditions. A

customized error message will be displayed providing the user with information about the data that is required.

Please note the following issues regarding the behavior of the wizard:

- **Mandatory Fields:** Mandatory fields in an editor must be completed in order to save the data and proceed to the next wizard step. If a wizard cannot advance to the next wizard step because mandatory properties have not been defined, an error message will list the mandatory properties that must be defined in order for the wizard to proceed to the next step.
- **NextButton:** The **Next** button allows the user to save the data entered during the wizard step and proceed to the next wizard step. If the automated translation is supported for the object class, the automated data translation capability will be triggered when the **Next** button is clicked. Please note the following:
  - If a pre-condition is defined for the last wizard step and the pre-condition is not fulfilled, then the wizard will close when the user clicks the **Next** button in the wizard step before the last wizard step.
  - If the post-condition specifies that the data is required (mandatory), a customized error message will be displayed when the user clicks the **Next** button. The user will not be able to advance to the next wizard step until the required data is provided. If the post-condition specifies that the data is desired (optional), a customized information message will be displayed if the data is missing. However, the user will not be prevented from advancing to the next wizard step.
  - If multiple post-conditions have been configured for a wizard step, only one error message at a time will be displayed when the user attempts to save the data by clicking the **Next** button. Once the user corrects the first violation and attempts to advance to the next wizard step, a customized error message for the next violation will be displayed. This process will continue until all violations have been corrected. The user will only be able to advance to the next wizard step when no violations have been found via the data entry prompts.
- **ExitButton:** The **Exit** button allows the user to save the data entered during the wizard step and close the wizard. The next time the user opens the wizard for the selected object, the wizard will automatically open to the wizard step that the user most recently exited. Likewise, if the user session is terminated while the wizard is open, the wizard will open to the wizard step that was last open when the session was terminated. Please note the following:
  - If a user clicks the **Exit** button during the creation of a new object on a first wizard step, the new object will be deleted!
  - The caption displayed on the **Exit** button is configurable and therefore, a different caption (such as **Save** ) may be displayed on the button.
- **BackButton:** A **Back** button may be displayed that allows the user to return to the preceding wizard step. By clicking the **Back** button, the user saves the data entered during the wizard step and returns to the preceding wizard step. The **Back** button will be greyed out and inactive on the first step of a wizard.
- **Go to StepButton:** A **Go to Step** drop-down box may be displayed that will allow users to select another wizard step in the workflow. This enables the user to leave the linear sequence of steps and return to a subsequent or preceding wizard step in the wizard process. The **Go to Step** field is only available when an existing object is being edited. It is not available when a new object is being created. If the wizard is configured to include the **Go to Step** field, users will be able to traverse to any subsequent or preceding wizard step. If post-conditions are configured for the wizard step that

the user is leaving, the post-conditions will be executed and, if necessary, required data must be entered in order to leave the current wizard step. Please be aware, however, that post-conditions for any intermediary steps between the wizard step the user is leaving and the wizard step the user is going to will not be checked. For example, if a user goes from Wizard Step 2 to Wizard Step 4, the post-conditions for Wizard Step 2 will be checked and must be fulfilled, but post-conditions for Wizard Step 3 will not be triggered and must not be fulfilled in order to go to Wizard Step 4.

- **Close Button:** The wizard can be closed by clicking the **X** button in the upper right corner of the wizard. All data that has been saved via the **Next** button will be saved to the Alfabet database.



## Multi-Language Support in Editors and Wizards

Depending on the configuration of your Alfabet solution, object data such as names, descriptions, and other relevant custom properties may be captured in the enterprise's primary language, any of its secondary languages, or in a statutory language that is mandated for relevant object classes. If the enterprise supports multiple languages, the data captured for protected and custom properties of the type `String` and `Text` may be translated to the other languages implemented in your Alfabet solution. When the user interface is rendered in a one of the languages for which translations are available, the translated names of objects will be displayed in explorers, object profiles, page views, previews, etc. Objects with names defined in a secondary language will be ordered accordingly in explorer trees and page views.



If data translation is supported for the class **Business Process**, a user could capture the **Name** and **Description** of their business processes in the primary language. The same user or other users with access to the business processes could then either manually provide a translation for the names and descriptions of the business processes in the editor/wizard or, if the automated translation capability is configured, the data can be translated via a translation service to the languages supported by the enterprise.

Your solution designer will configure on a per-class basis whether the translation of object data is possible and which properties may be manually translated or translated via the automated translation capability. To understand which languages are supported by your enterprise, click the **< Alfabet User Name > Language** menu in the main toolbar. The following scenarios to capture and translate object data are supported:

- Data can be captured in the primary language only. If only one culture is defined for the enterprise, then the **Manual Translation**  and **Automated Translation**  icons will be disabled in the editor/wizard.
- Data can be captured in the primary language and may be translated either manually and/or automatically to one or more secondary languages. It is possible to configure on a per-class basis the object classes where only manual translation is possible, where only automated translation is possible, or where an automated translation is provided if no manual translation has been entered.
  - The manual translation can be captured by changing the language selector in the editor/wizard and entering the translation in the relevant field.
  - The automated translation will be triggered when the **OK** button in the editor or **Next** button in the wizard is clicked.






In some cases, a new object will inherit the translated name, description, etc. of its parent object. This is the case, for example, for information flows, local components, or business services. If translations are available for the name of the parent object, the new information flow, local component, or business service will inherit the translated name of

its parent object. For example, a business service will inherit the translated name of the business function it is based on and an information flow will inherit the name of its source and target applications.

- Data can be captured in a secondary language. The Alfabet user interface must be rendered in the secondary language to capture data in that language. In this case, it is recommended that the automated translation capability is configured in order to provide a translation of the name for the object in the primary language. For more information about capturing data in a secondary language, see the section [Capturing Data in a Secondary Language](#).
- Data can be captured in a statutory language, which can be the primary language or a secondary language. The Alfabet user interface should be rendered in the statutory language to capture data in that language. If the statutory language is a secondary language, it is recommended that the automated translation capability is configured in order to provide a translation of the name for the object in the primary language. For more information about capturing data in a statutory language, see the section [Capturing Data in a Statutory Language](#).
- Data can be captured via XLSX files based on data capture templates configured in the **Extended Data Capture Templates** functionality. In this case, data can also be captured in a primary, secondary, or statutory language. For more information about configuring and using data capture templates to import object data, see the chapter *Capturing Data with Data Capture Templates* in the reference manual *User and Solution Administration*.

An icon will be displayed next to each field in the editor/wizard that may be translated. You may see any of the following icons next to the fields that support data translation:

- **Manual Translation**  : This field may be manually translated.
- **Automated Translation**  : This field may be manually translated or translated via the automated translation capability.
- **Disable Automated Translation**  : This indicates that the automated translation capability has been disabled because an automated translation is not desired for this particular field for the selected object. For example, in the case of the object class **Location**, whereas it may be meaningful for a city name to be translated (for example, Berlin would be translated to Berlino in Italian, Berlim in Portuguese, and Berlina in Polish), it may make no sense for the names of small towns to be translated because no actual translation of the town's name exists.



Your solution designer will configure whether the translation of data is supported for a class, which of the properties of the class may be translated, and whether only manual translation or both manual and automated translation is allowed. For more information about configuring permissibility for object data translation as well as the general requirements to implement the manual and automated translation capability, see the section *Configuring the Translation of Object Data* in the chapter *Localization and Multi-Language Support for the Alfabet Interface* of the reference manual *Configuring Alfabet with Alfabet Expand*.

The following prerequisites must be fulfilled for strings to be successfully fetched for automated translations:

- The enterprise must have a valid licence to one of the following translation services:
  - Google Translate®
  - AWS Translate®



- DeepL® Translator
- Microsoft® Azure® Translate Text
- The XML object **AlfaTranslationServicesConfig** must be configured and the connection to the translation service must be activated. For more information about the configuration of the XML object **AlfaTranslationServicesConfig**, see the section *Configuring Interoperability with a Translation Service* in the reference manual *API Integration with Third-Party Components*.
- The pre-conditions for activating the Rest API must be fulfilled. For more information, see the reference manual *Alfabet RESTful API*.
- One user in the enterprise must be specified to execute self-reflective events and must start the Alfabet Server. For more information, see the chapter *Setting a User as a Self-Reflective User to Execute Events* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- The Alfabet Server must be running and able to connect to the Internet.

The following information is available:

- [Translating Object Data Manually](#)
- [Translating Object Data via the Automated Translation Capability](#)
- [Capturing Data in a Secondary Language](#)
- [Capturing Data in a Statutory Language](#)

### Translating Object Data Manually





Depending on the configuration of your Alfabet solution, data can be captured in the primary language or a secondary language and may be manually translated to the other languages supported by the enterprise. To display any existing translations of text fields in the editor/wizard or to provide a manual translation for a field in the editor/wizard, you must explicitly change the language selector in the lower left corner of the editor to the relevant language.



Your solution designer will configure whether the translation of object data is supported for a class, which of the properties of the class may be translated, and whether only manual translation, only automated translation, or both manual and automated translation is allowed. For more information about configuring permissibility for object data translation as well as the general requirements to implement the manual and automated translation capability, see the section *Configuring the Translation of Object Data* in the chapter *Localization and Multi-Language Support for the Alfabet Interface* of the reference manual *Configuring Alfabet with Alfabet Expand*.

For more information about capturing object data in a secondary language, see the section [Capturing Data in a Secondary Language](#).

A manual translation may be defined for object data in editor/wizard fields displaying any of the following icons:

- **Manual Translation** : This indicates that a manual translation may be specified for a language selected in the language selector at the bottom of the editor/wizard. If no translation is manually provided for a language, the following will occur:
- **Automated Translation** : This indicates that the field may be translated via the automated translation capability but it is possible to provide a manual translation instead. If a manual translation is entered in a field with the **Automated Translation**  icon, the manual translation will have precedence and the field will not be translated via the automated translation capability. If no manual translation is provided, the value in the field will be translated via the automated translation capability when the **OK** button in the editor/the **Next** button in the wizard is clicked. The configured translation service will fetch the translation strings for all relevant languages.
- **Disable Automated Translation** : This indicates that the automated translation capability has been disabled for the field because an automated translation is not desired for this particular field for the selected object. Nevertheless, a manual translation could be entered if this was necessary for some reason.



For more information about configuring permissibility for object data translation as well as the general requirements to implement the manual translation capability, see the section *Configuring the Translation of Object Data* in the chapter *Localization and Multi-Language Support for the Alfabet Interface* of the reference manual *Configuring Alfabet with Alfabet Expand*.

To manually define a translation string:

- 1) Ensure that the Alfabet user interface is rendered in the language that you want to capture the original data for. Typically this is the enterprise's primary language. If you are capturing the original data in a secondary language, please also refer to the section [Capturing Data in a Secondary Language](#).
- 2) In the relevant view, click the option available to create the new object.
- 3) In the editor/wizard, enter a value in a relevant editor field the language selected for the user interface.
- 4) Change the language selector at the bottom of the editor to the language of the translation.
- 5) Enter the translated value in the relevant editor field supporting data translation. Please note the following:
  - If the original string is changed in the editor/wizard, the existing strings that have been manually translated will not be changed or deleted.
  - If no manual translation is provided for a selected language, the field in the editor/wizard will remain empty.
  - If the value in the field is defined for the primary language, then the primary language string will be displayed for the value when the user interface is rendered in a language with no translated string.
  - If the value in the field is defined for a secondary language and no value is defined for the primary language, then the secondary language string will be displayed for the value when the user interface is rendered in the primary language or another language with no translated string. Please note that this is not recommended as it will cause inconsistencies in the language displayed in the user interface. All objects should have an appropriate value in the primary language.

- 6) Click the **OK** button in the editor or the **Next** button in the wizard to save the translation.

### Translating Object Data via the Automated Translation Capability

Depending on the configuration of your Alfabet solution, data can be captured in the primary language or a secondary language and may be translated via the automated translation capability to the other languages supported by the enterprise.



Your solution designer will configure whether the translation of data is supported for a class, which of the properties of the class may be translated, and whether only manual translation, only automated translation, or both manual and automated translation is allowed. For more information about configuring permissibility for object data translation as well as the general requirements to implement the manual and automated translation capability, see the section *Configuring the Translation of Object Data* in the chapter *Localization and Multi-Language Support for the Alfabet Interface* of the reference manual *Configuring Alfabet with Alfabet Expand*.

Please note the following prerequisites must be fulfilled for strings to be successfully fetched for automated translations:




- The enterprise must have a valid licence to one of the following translation services:
  - Google Translate®
  - AWS Translate®
  - DeepL® Translator
  - Microsoft® Azure® Translate Text
- The XML object **AlfaTranslationServicesConfig** must be configured and the connection to the translation service must be activated. For more information about the configuration of the XML object **AlfaTranslationServicesConfig**, see the section *Configuring Interoperability with a Translation Service* in the reference manual *API Integration with Third-Party Components*.
- The pre-conditions for activating the Rest API must be fulfilled. For more information, see the reference manual *Alfabet RESTful API*.
- One user in the enterprise must be specified to execute self-reflective events and must start the Alfabet Server. For more information, see the chapter *Setting a User as a Self-Reflective User to Execute Events* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- The Alfabet Server must be running and able to connect to the Internet.

For more information about capturing object data in a secondary language, see the section [Capturing Data in a Secondary Language](#).



You can disable the automated translation capability if an automated translation should not be triggered for a particular field in the editor/wizard. For example, in the case of the object class **Location**, whereas it may be meaningful for a city name to be translated (for example, Berlin would be translated to Berlino in Italian, Berlim in Portuguese, and Berlina in Polish), it may make no sense for the names of small towns to be translated because no actual translation of the town's name exists.

To disable the automated translation capability, click the **Automated Translation**  button.

The icon will change to the **Disable Automated Translation**  icon. You can click the **Disable Automated Translation**  button to return the **Automated Translation**  button. If a field with an existing automated translation string is disabled for automated translation, the translated string will be deleted from the Alfabet database.





Please note that if a user logs in and creates an object in the language of the Alfabet user interface and shortly thereafter another user logs in to the user interface with a different language and edits the same object by changing the automatically translated string, a pop-up will open asking the user whether the changed string shall be translated to all supported languages. This allows the user to differentiate between a major change to the content of the string which would warrant the need for the string to be retranslated vs. a minor change whereby the user is making a slight correction to the translation of the string.

To execute the automated translation capability to fetch translation strings:

- 1) Ensure that the Alfabet user interface is rendered in the language that you want to capture the original data for. Typically this is the enterprise's primary language. If you are capturing the original data in a secondary language, please also refer to the section [Capturing Data in a Secondary Language](#).
- 2) In the relevant view, click the option available to create the new object.



If an object is created as a copy of an object, then the automated translation will be copied to the new object. For example, if an application variant is created based on an application or if a local component is created for an application, the translation of the application's description would be copied to the respective application variant or local component. The translation string can be changed as needed.

- 3) In the editor/wizard, enter a value in the language selected for the user interface in a field with the **Automated Translation**  icon. If a manual translation is entered in a field with the **Automated Translation**  icon, the manual translation will have precedence and the field will not be translated via the automated translation capability.
- 4) Click the **OK** button in the editor/the **Next** button in the wizard. The configured translation service will fetch the translation strings for all relevant languages. Please note the following:
  - The translated string will not be immediately displayed. A few minutes may be needed to fetch the translations.
  - If an object is created as a copy of an object, then the automated translation will be copied to the new object. For example, if an application variant is created based on an application or if a local component is created for an application, the translation of the application's description will be copied to the respective application variant or local component. The translation string can be changed as needed.
  - If the original string is used for multiple object data, the same translation string will be used for all occurrences of the original string in the Alfabet database.
  - If the original string is changed in the editor/wizard after translation strings have been fetched, the automated translation will be triggered again when the **OK** button in the editor/the **Next** button in the wizard is clicked and new translation strings will be fetched from the translation service.

- If an existing translation string has already been translated manually or via the automated translation capability, it will not be retranslated if the automated translation capability is triggered for other fields in the editor/wizard.
- If an existing translation string has been translated via the automatic translation capability, it may be manually revised in the editor/wizard or in the *Automated Data Translation Functionality*. If the original string is used for multiple object data, then only the explicit translation string that is being revised will be changed in the Alfabet database. Other instances of the translation string will remain unchanged and will not be impacted by the revised translation string. In this way, you can revise the translation string for a specific context.
- A user with an administrative profile may review the translation strings fetched via the automated translation capability and modify them as needed in the *Automated Data Translation Functionality*. For more information, see the chapter *Managing Automated Translation Strings* in the reference manual *User and Solution Administration*.



- If no translated string is returned, please consider the following: The following prerequisites must be fulfilled for strings to be successfully fetched for automated translations:
  - The enterprise must have a valid license to one of the supported translation services.
  - The connection to the translation service must be active in the XML object **AlfaTranslationServicesConfig**. For more information about configuring the XML object **AlfaTranslationServicesConfig**, see the chapter *Configuring Interoperability with a Translation Service* in the reference manual *API Integration with Third-Party Components*.
  - The Alfabet Server must be running and able to connect to the Internet.
  - The pre-conditions for activating the Rest API must be fulfilled. For more information, see the reference manual *Alfabet RESTful API*.
- A user with an administrative profile may review whether the event has been successfully triggered in the *Events Administration Functionality*. If the event is not displayed or has an `Error` status, then the prerequisites should be reviewed. For more information about events administration, see the chapter *Managing Events* in the reference manual *User and Solution Administration*.
- A user with an administrative profile may view the status of the ADIF import scheme (`Get Automated Instance Translations from Service Provider` or `Get Automated Translations for an Instance from Service Provider`) that are executed for the automated translations in the *ADIF Jobs Administration Functionality*. For more information about events administration, see the chapter *Executing and Controlling ADIF Jobs* in the reference manual *User and Solution Administration*.

If automated translations have not been fetched due to Internet connection outages, a solution designer can trigger the ADIF import scheme `Get_Instance_Automated_Translations_For_Empty_Texts` or similar ADIF jobs to retrieve the automated data translations that have been missed as a result of the Internet connection outages. For more information about the predefined ADIF schemes for the automated translation capability, see the section *Predefined ADIF Schemes* in the reference manual *Alfabet Data Integration Framework*.

## Capturing Data in a Secondary Language

The possibility to capture data in a secondary language provides end users with the means to capture and maintain IT portfolio information in their preferred language and ensures high data quality in multi-language organizations. The method to capture data in a secondary language is similar to that described in the section [Translating Object Data via the Automated Translation Capability...](#)



In order to capture language in a secondary language, you must ensure that the checkbox for the **Capture Translations in Language of User Interface** field in their **User Settings** editor is selected. For more information, see the section [Defining Your User Settings in Alfabet](#). For more information about the other configuration requirements to capture data in a secondary language, see the section *Allowing Data To Be Captured in a Non-Primary Language* in the reference manual *Configuring Alfabet with Alfabet Expand*.

Please note that it is highly recommended that the automated translation capability is configured in order to provide an adequate translation of the name for the object in the primary language. For more information about configuring permissibility for object data translation as well as the general requirements to implement the manual and automated translation capability, see the section *Configuring the Translation of Object Data* in the chapter *Localization and Multi-Language Support for the Alfabet Interface* of the reference manual *Configuring Alfabet with Alfabet Expand*.

A user with an administrative profile may review the translation strings fetched via the automated translation capability and modify them as needed in the *Automated Data Translation Functionality*. For more information, see the chapter *Managing Automated Translation Strings* in the reference manual *User and Solution Administration*.

To capture data in a secondary language:

- 1) Ensure that the Alfabet user interface is rendered in the secondary language that you want to capture the original data for.
- 2) In the relevant view, click the option available to create the new object.



The secondary language should be the same as the language of the Alfabet user interface.

- 3) In the editor/wizard, enter a value in a relevant editor field in the language selected for the user interface.



Every new object that is created requires a value in the **Name** attribute for the primary language. If the data is originally captured in a secondary language, then the **Name** attribute must be specified in the primary language either via a manual translation or via the translation capability.

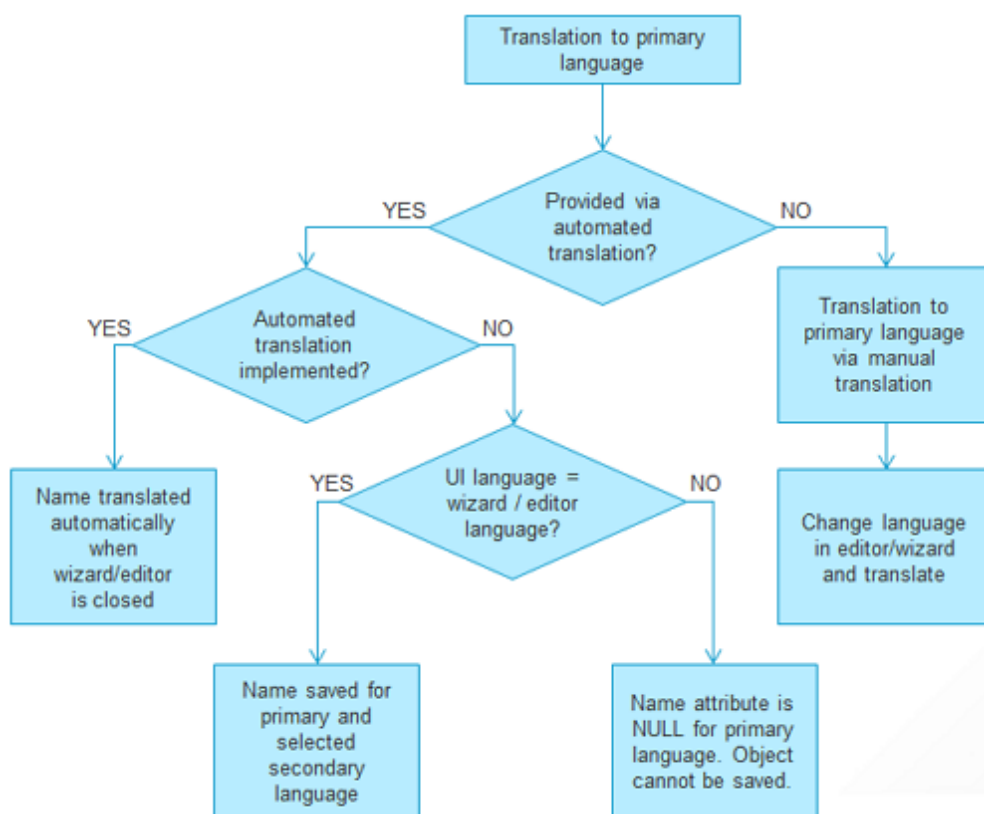


FIGURE: Translation to primary language

Please note the following:

- If the translation to the primary language is provided via the automated translation capability:
  - If the automated translation capability is implemented, the name will be automatically translated to the primary language when the editor/wizard is closed.
  - If the automated translation capability is **not** implemented, please consider the following:
    - If the language of the user interface is the same as the language selected in the editor/wizard, the value entered in the **Name** field will be saved for both the selected secondary language as well as the primary language. The language can be manually translated to the primary language in the editor after the new object has been saved.
    - If the language of the user interface is not the same as the language selected in the editor/wizard, the object cannot be saved because the **Name** attribute is NULL for the primary language. In this case, you must change the language of the user interface to the language that you want to capture the data in.
    - If a translated string is changed, the automated translation will be triggered again for all languages. The original string captured in the

secondary or statutory language will not be changed via the automated translation.

- If the translation to the primary language shall be defined via a manual translation:
    - Enter the value in the editor field, change the language selector at the bottom of the editor to the primary language, and enter the translated value in the relevant editor. Click the **OK** button in the editor/the **Next** button in the wizard to save the definitions.
    - If no manual translation is defined for the primary language, the original string defined in the secondary language will be displayed for the **Name** when the user interface is rendered in the primary language. This may be revised at any time in the editor/wizard.
    - If no manual translation is defined for any of the other secondary languages, the value displayed for the **Name** when the user interface is rendered in the primary language will also be displayed when the user interface is rendered in the secondary language.
- 4) Click the **OK** button in the editor or the **Next** button in the wizard to save the data. The automated translation capability will be triggered.

### Capturing Data in a Statutory Language

A statutory language capability is available in order to address regulatory requirements that mandate that objects are captured in a specific language. For example, if an enterprise has English as its primary language, but an organization in the enterprise is located in Germany and is required to capture data in German, then users can capture the data in the statutory language of German.

When a user creates an object based on a relevant object class/object class stereotype, a statutory language selector will open in which the statutory language can be selected. All languages supported by the enterprise will be available for selection. In the object editor that opens, the user can capture all attributes that support data translation in the statutory language. The automated translation capability will then translate the data to the primary language as well as other relevant secondary languages.



In order to capture language in a statutory language, you must ensure that the checkbox for the **Capture Translations in Language of User Interface** field in their **User Settings** editor is selected. For more information, see the section [Defining Your User Settings in Alfabet](#). For more information about the other configuration requirements to capture data in a statutory language, see the section *Specifying a Statutory Language for the Enterprise* in the reference manual *Configuring Alfabet with Alfabet Expand*.

Please note that it is highly recommended that the automated translation capability is configured in order to provide an adequate translation of the name for the object in the primary language. For more information about configuring permissibility for object data translation as well as the general requirements to implement the manual and automated translation capability, see the section *Configuring the Translation of Object Data* in the chapter *Localization and Multi-Language Support for the Alfabet Interface* of the reference manual *Configuring Alfabet with Alfabet Expand*.

A user with an administrative profile may review the translation strings fetched via the automated translation capability and modify them as needed in the *Automated Data Translation*



*Functionality.* For more information, see the chapter *Managing Automated Translation Strings* in the reference manual *User and Solution Administration*.

A user with an administrative profile may review the values defined for the **Name** attribute of the objects with a statutory language definition and change them as needed in the *Statutory Language Review for Data Translations* functionality. Furthermore, the administrative user can change the statutory language or remove the statutory language definition if needed. For more information, see the chapter *Managing the Translations for the Enterprise's Statutory Language* in the reference manual *User and Solution Administration*.



Please note the following:

- All languages configured for your Alfabet solution will be available in the statutory language selector.
- There is no enforcement mechanism that requires users to capture data in a statutory language.
- The Alfabet user interface must be rendered in the statutory language that the user wants to capture the original data for.
- The value defined for the selected statutory language will never be replaced by an automated translation string.

Please note that if the user interface is rendered in a language that is different than the selected statutory language, a warning will be displayed in the editor. If the user nevertheless proceeds to capture data in the non-statutory user interface, an automated translation string will not be fetched for the statutory language and the value for the statutory language will be empty.

To capture data in a statutory language:

- 1) Ensure that the Alfabet user interface is rendered in the statutory language that you want to capture the original data for.
- 2) In the relevant view, click the option available to create the new object.
- 3) In the language selector that opens, select the statutory language.



The statutory language should be the same as the language of the Alfabet user interface.

- 4) In the editor/wizard, ensure that the statutory language is selected in the language selector at the bottom of the editor/wizard.
- 5) Enter a value in a relevant editor field the language selected for the user interface.



Every new object that is created requires a value in the **Name** attribute for the primary language. If the data is originally captured in a secondary language, then the **Name** attribute must be specified in the primary language either via a manual translation or via the translation capability.

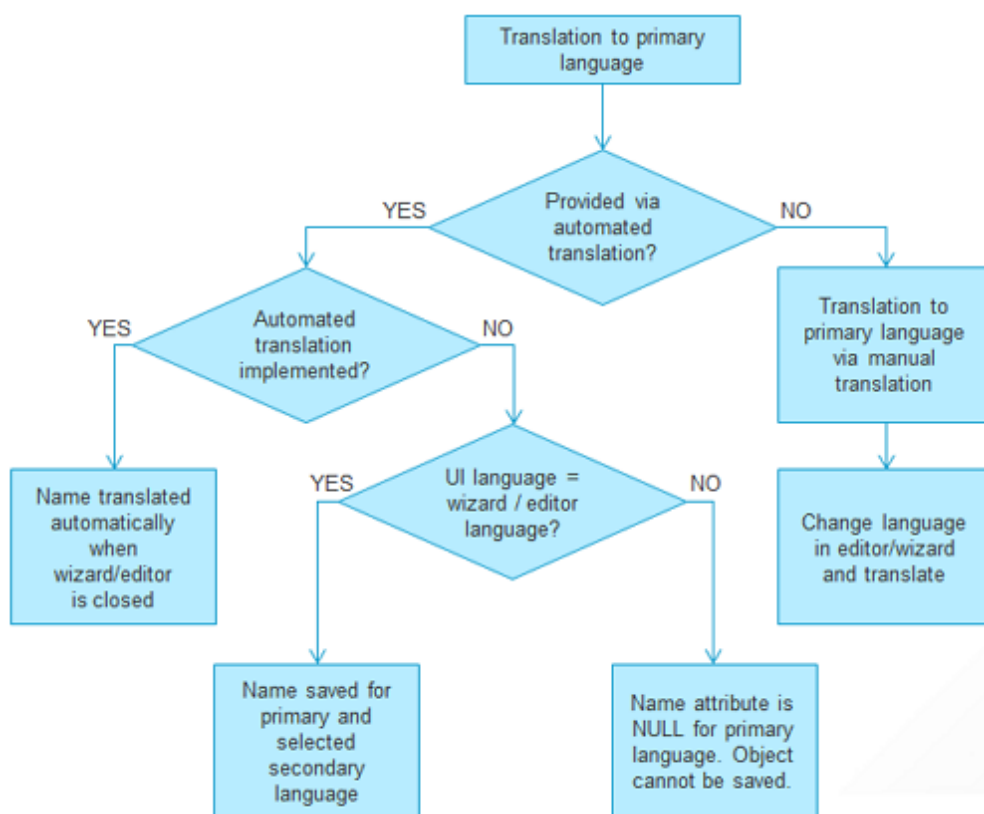


FIGURE: Translation to primary language

Please note the following:


- If the translation to the primary language is provided via the automated translation capability:
  - If the automated translation capability is implemented, the name will be automatically translated to the primary language when the editor/wizard is closed.
  - If the automated translation capability is **not** implemented, please consider the following:
    - If the language of the user interface is the same as the language selected in the editor/wizard, the value entered in the **Name** field will be saved for both the selected secondary language as well as the primary language. The language can be manually translated to the primary language in the editor after the new object has been saved.
    - If the language of the user interface is not the same as the language selected in the editor/wizard, the object cannot be saved because the **Name** attribute is NULL for the primary language. In this case, you must change the language of the user interface to the language that you want to capture the data in.
    - If a translated string is changed, the automated translation will be triggered again for all languages. The original string captured in the

secondary or statutory language will not be changed via the automated translation.



- If the translation to the primary language shall be defined via a manual translation:
    - Enter the value in the editor field, change the language selector at the bottom of the editor to the primary language, and enter the translated value in the relevant editor. Click the **OK** button in the editor/the **Next** button in the wizard to save the definitions.
    - If no manual translation is defined for the primary language, the original string defined in the secondary language will be displayed for the **Name** when the user interface is rendered in the primary language. This may be revised at any time in the editor/wizard.
    - If no manual translation is defined for any of the other secondary languages, the value displayed for the **Name** when the user interface is rendered in the primary language will also be displayed when the user interface is rendered in the secondary language.
- 6) Click the **OK** button in the editor or the **Next** button in the wizard to save the data. The automated translation capability will be triggered.

## Entering Data in Object Profiles and Object Cockpits

Depending on your solution configuration, you may be able to edit data directly in fields capturing scalar and reference attributes in object profiles and object cockpits. If inline editing is supported, you can edit scalar attributes for an existing object directly in the **Attributes** section of an object profile or in an object cockpit

without needing to open the object's editor or wizard. When you point to the attribute, the **Edit**  icon will be displayed next to the attribute to indicate the object can be edited inline.

To edit inline, click in the field and depending on the type of field, define text, select a value in a drop-down list, or specify a date. The size of a text field will expand accordingly for fields with longer texts. In the case of text fields that have long texts in them, the size of the field will expand to comfortably edit inline. Upon

completion, you can then click the **Save**  button to save the definition to the Alfabet database or click the **Cancel**  button to remove the definition.



Please note the following regarding the inline editing functionality:

- Only scalar and reference properties that are editable in the editor/wizard available in the object profile or object cockpit can be edited via inline editing.
- All unique constraints defined for the class as well as any post-conditions configured for the wizard associated with the object profile/object cockpit will be applied to the data entered.



Please note that data is saved to the Alfabet database prior to the post-condition being validated. Therefore, data entered via inline editing will be saved

even if the post-condition is not fulfilled. This is because the data must be available in the Alfabet database in order to be evaluated for the post-condition. If the data entered does not fulfill the post-condition, the configured warning message will be displayed explaining that the input must be corrected in order to fulfill the post-condition.

- Inline editing may be limited or prevented if the syntax of the post-condition is not correct. In this case, an error will be displayed if the user tries to open the wizard.




Permissibility of inline editing can be specified by your solution designer on the level of an object view, class setting, or GUI scheme. For more information, see the section *Configuring Inline Editing of Attributes in the Object View* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Creating Objects in Alfabet

The view to use to create an object will depend on the object class that you are working with. For example:

- To create an object at the root level of the object hierarchy, click the root icon at the top of the explorer tree and either click **New > Create New <Object>** in the view to the right or, if several views are displayed, open the relevant view and click **New > Create New <Object>**.
- To create a subordinate object of another object in the explorer tree structure, click the parent object in the explorer tree and then open the relevant page view in the object profile. Click **New > Create New <Object>** in the toolbar in that page view.
- Some views such as **Capture Applications**, **Capture Components**, etc. are not accessible via an explorer tree. In these cases, a **New** button may be available to create a new object.


In the process of creating an object, you typically define its basic properties such as the name, start date, description, authorized user, etc. that describe the object. If the object is based on an object class stereotypes, the **Stereotype** attribute must be defined for the object.

The user who creates the object is automatically designated the authorized user. An authorized user has Read/Write access permission to the object. After an object is created, the authorized user may be changed at any time. Every object can have at most one authorized user and multiple authorized user groups. However, it is also possible that no authorized user is defined for an object. The authorized user or user group can be reassigned in the **Authorized Access** tab in the respective object's editor. To access the editor, click the **Edit**  button in the toolbar of the object's profile. A user can see all objects that he/she has authorized access to in the **Authorized User Objects** page view in the **Personal Info** functionality in the **Home**. If permission rules are defined for the enterprise, it is possible that the authorized user may only edit the object during the user session in which the object was created. Once the session ends, the authorized user will no longer be able to edit the object. For more information about the configuration of access permissions, see the section *Configuring Access Permissions for Alfabet* in the reference manual *Configuring Alfabet with Alfabet Expand*.

After an object has been created and its basic properties have been defined in the editor or wizard, the data can be modified at any time by a user with access permissions to the object. This can be done in the page views that are available in the object profile. Please note that if filters are defined in a page view and the edited object no longer fulfills the filter criteria, it will no longer be visible in the table. You will need to adjust your filter settings to see the object.



Most changes that you make to an object that you have selected in an explorer will be automatically updated. However, if you make a change to the parent object of a currently selected object,

then you must click the **Refresh Explorer**  button to update the explorer. For example, if you select an application and assign it to a new application group or if you select an organization and define it as a sub-organization of another organization, then you must update the explorer to reflect the new position of the application or organization in the explorer.

## Detaching and Deleting Objects

When you detach an object from its parent object, you are simply removing it from the object that it has a relationship to. The relationship between the two objects is deleted, but both objects remain in the database. For example, if you detach an application from an application group, the application is no longer assigned to the application group and the application and application group are still in the Alfabet database.

When you delete an object, you irrevocably delete the object from the Alfabet database. The message that is displayed when an object is deleted will warn the user that related objects will also be deleted when applicable. For example:



- If you delete an application, it will be irrevocably deleted from the Alfabet database.
- If the deleted application has application variants, the application variants will become application versions. In this case, the value `True` will be removed from the **Is Variant** attribute.
- If any of the following dependent objects or data is defined for the deleted application, these will also be deleted: Enterprise Release Item, Business Service, Business Data Usage, Information Flow, Local Component, Stack, Migration Rule, Operational Business Support, Tactical Business Support, Solution Business Support, Solution Information Flow, Application Diagram, Platform Diagram, Assignment, Attachment, Deputy, Evaluation, Lifecycle, Role.

Depending on the object that is being deleted, there may be consequences to objects that are subordinate to a deleted object.



- If you delete an ICT object category, it will be irrevocably deleted from the Alfabet database.
- If you delete an ICT object category that has ICT objects assigned to it, those ICT objects will remain in the database but will no longer be assigned to an ICT object category. To view all ICT objects that are not assigned to a category and reassign them to another category, see the *Unassigned ICT Objects Page View*.
- Only an ICT object category with no subordinate ICT categories can be deleted. Therefore, you may need to first delete all sub-categories from the selected ICT object category or reassign them to another ICT object category. To reassign an ICT object category to another ICT object category, see the *Sub-Categories Page View* of the category that is to be the new ascendant (parent) ICT object category.
- If any of the following dependent objects or data is defined for the deleted object, these will also be deleted: Assignment, Attachment, Deputy, Role.


Please note the following information about the **Delete** action:

- You cannot delete an object that has the release status **Draft**. If you erroneously create an object and want to delete it, you must first change the release status.
- The deletion of objects in Alfabet is not recommended. Rather, it is recommended that you set the release status of an object to retired. An error may occur if a user attempts to create a relationship to an object that is concurrently being deleted.




**There is no Undo function in Alfabet!** There is no Undo action if an object is falsely deleted nor will archive information be automatically generated for a deleted object. You should only delete an object if you are certain that it should be deleted from the Alfabet database. If archive information is desired, the object must be explicitly archived by your solution administrator who is responsible for the archiving capability. For more information about the archiving capability, see the chapter *Deleting and Archiving Alfabet Objects* in the reference manual *User and Solution Administration*

To delete an object:

- 1) In the relevant view, click the object you want to delete.
- 2) In the toolbar, click the **Delete**  button.
- 3) Confirm the warning by clicking **Yes**, or click **No** to exit without deleting the selected object(s).

To detach an object:

- 1) In the relevant view, click the object you want to detach.
- 2) In the toolbar, click the **Detach**  button.
- 3) Confirm the warning by clicking **Yes**, or click **No** to exit without saving your changes.


## Analyzing Your Data in Page Views and Reports


Alfabet provides a wide variety of views to present and analyze data. Many reports display data in standard dataset tables with columns. However, a number of other types of visualizations of data are also available. These include:

- landscape diagrams
- matrix reports
- portfolio charts
- pie charts
- Gantt charts
- bar charts
- treemap report
- layered diagrams
- cluster maps

In most views and reports, you can double-click an object in order to navigate to its object profile. Please note that the double-click action is reserved only for navigation. If you double-click an object and nothing happens, then navigation is not possible for the object.

Business graphics will be rendered to maximize the screen space available. When relevant, Alfabet business graphics provide a legend that will help you to understand the information displayed in the graphic. The functionalities available in the legend will depend on the type of business graphic that you are currently working with. Finally, graphics can be exported, linked to Microsoft® Office documents, and printed at full printer resolution with reliable color.

 If the page view or configured report displays portfolios, Gantt charts, branching diagrams, sun-ray diagrams, circular roadmaps, etc., you can specify whether or not the graphics shall be built dynamically when the view is opened. This is done via the **Enable User Interface to Poll Web Server** attribute in the **User Settings** editor. For more information, see the section [Defining Your User Settings in Alfabet](#).

 Depending on the configuration of your Alfabet solution, many of the reports that you see may be configured reports that have been created by your solution designer in order to provide a customized data analysis that is not available in the standard Alfabet product. Reports may be configured to display data in tables, matrices, portfolios, or Gantt charts. Other graphic visualizations may also be displayed in configured reports including, for example, treemap reports, layered diagrams or grid reports. Configured reports may be available in the object profiles or object cockpits that you have access permissions to as well as in the [Executing Your Configured Reports](#). If your solution designer has provided a context-sensitive help page for the configured report, you will be able to open this via the Help button in the Alfabet interface.

The following information is available:

- [Defining Filter Settings](#)
  - [Defining Text Fields](#)
  - [Defining Object Selector Fields](#)
  - [Defining Checkbox Fields](#)
  - [Defining Combo-Box Fields](#)
  - [Defining Filters with Two Fields](#)
  - [Defining Calendar Fields](#)
  - [Defining Multiple Selection Combo Box Fields](#)
- [Working with Data in Tabular Datasets](#)
- [Working with Diagrams](#)
  - [Designing a Diagram](#)
  - [Interpreting a Diagram](#)
- [Working with Portfolio Reports](#)
- [Working with Lifecycle Reports and Time Schedules](#)
- [Working with Configured Business Support Matrix Reports](#)

- [Understanding the Different Types of Customized Business Support Matrices](#)
- [Defining the Standard Filters in the Configured Business Support Matrix](#)
- [Creating New Business Supports By Means of the Configured Business Support Matrix](#)
- [Working with Layered Diagram Reports](#)
- [Working with Tree Reports](#)
- [Working with Cluster Map Reports](#)
- [Working with Affinity and Diagram Matrix Reports](#)
- [Working with Radar, Bar, Line and Pie Charts](#)
- [Working with Treemap Reports](#)
- [Executing Your Configured Reports](#)
  - [Adding a Configured Report to the View](#)
  - [Opening a Configured Report](#)
  - [Opening a Configured Report Executed Offline](#)

## Defining Filter Settings


Standard page views as well as configured reports may allow you to capture, maintain, and analyze the data for the objects you are responsible for. Page views and configured reports may display a table with data or a graphic visualization such as a diagram, portfolio, bar chart, matrix view, etc. Many page views in Alfabet have a filter panel above the toolbar that typically allow you to limit the data displayed in the view so that you can focus on a specific set of objects in the IT. In configured reports, filters may also be displayed on the left or right of the content area.

The screenshot shows a filter panel for 'Demand Management'. It contains several input fields and dropdown menus:
 

- Name / ID:** A text input field with a search icon.
- Affected Element:** A text input field with a search icon.
- Select a Role Type and ...:** A dropdown menu with '- Select -' and a search icon.
- Status:** A dropdown menu with '- Select -'.
- Requesting Organization:** A text input field with a search icon.
- Select a Date Type and Date:** A dropdown menu with '- Select -' and a calendar icon.
- Classification:** A dropdown menu with '- Select -'.

 An **Update** button is positioned at the bottom right of the filter panel. Below the filter panel is a toolbar with icons for **New**, **Delete**, **Edit**, **Action**, **View**, **Add to Clipboard**, and **Configure**.

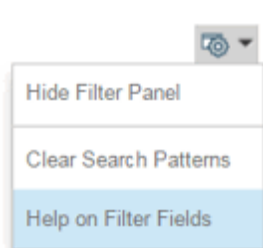
FIGURE: Defining filters in a page view




You can define any combination of filter settings. Each filter field provides cursory information about how to define the data. To access a help window providing more detailed information about the fields to be defined, click the **Options**  button on the right edge of the filter panel and select **Help on Filter Fields**. After you define the relevant fields, click the **Update** button.

If the data is hierarchically structured (for example, a hierarchy of projects and sub-projects), all objects below the object matching the filter criteria will also be hidden in the view. If no filters are defined, then all



data relevant to the selected object will be displayed. Once you have defined your filter settings, Alfabet will remember your settings in the view you are working in. When you return to the view during the session that you are logged on, you will not need to redefine the settings. The following options are available for the filter panel:



- To hide the filter area in order to increase the space to display data, click the **Options**  button and select **Hide Filter Panel**.
- To clear all filter settings, click the **Options**  button and select **Clear Search Patterns**.
- To access a help window providing information about the fields that can be filled out in the filter area, click the **Options**  button and select **Help on Filter Fields**.

In some configured reports you may see filters structured into basic filter options and advanced filter options. If you open a view with basic and advanced filters, only the basic filter fields will be displayed. You can click the Advanced link to expand and collapse the advanced filters:

Date for calculation:\*

[Advanced >>](#)

You may see any of the following types of filters fields in Alfabet:

- [Defining Text Fields](#)
- [Defining Object Selector Fields](#)
- [Defining Checkbox Fields](#)
- [Defining Combo-Box Fields](#)
- [Defining Filters with Two Fields](#)
- [Defining Calendar Fields](#)
- [Defining Multiple Selection Combo Box Fields](#)

### Defining Text Fields

Edit fields are fields in which you can enter a string. Typically, these are filter fields in which you can enter the name of an object. If you don't know the complete name of an object, you may be able to enter the first letters and append a wildcard (\*) to it to find objects whose names match the letters. For example, you can enter CR\* to find objects such as CRM Analysis, Credit Card Check, etc.




Additionally an auto-complete capability is available for filters based on edit fields in standard page views and enabled configured reports. You can enter text in the field and the auto-complete functionality will search for a matching string that has been previously used to search in the current view. A list of potential matches will be displayed in a list and updated with each additional letter typed in the field. The object must be explicitly selected in the drop-down list for the data to be entered in the field. Depending on your solution configuration, the search may return only strings you have entered or strings that all users have used to search in the field.



The implementation of the auto-fill capability must be configured by your solution designer. For more information, see the sections *Configuring the Wildcard for Standard and Custom Search Functionalities* and *Configuring Edit Fields* in the reference manual *Configuring Alfabet with Alfabet Expand*.

### Defining Object Selector Fields

Many of the tasks in Alfabet require you to select an existing object from an object selector. The

**Search**  symbol is displayed next to the fields that provide an object selector to find the object. An auto-fill function is available for filter fields displaying a **Search**  symbol. You can either search for an object in the object selector by clicking the **Search**  symbol or you can begin to enter the name of an object. The auto-fill function displays potential matches in a drop-down menu. Once the first three letters of a search string have been entered in the search field, the auto-fill function will invoke a search and start displaying a list of the matching objects. The list of matching objects will be updated with each additional letter typed in to the search field. The matching option must be explicitly selected in the drop-down menu for the data to be entered in the field.

### Defining Checkbox Fields

Checkboxes serve as a means to capture a `True/False` value. Setting a checkmark in the checkbox indicates the value `True`. If a checkbox is selected, you can clear the setting and set the value `False` by clicking the checkbox and removing the checkmark.

### Defining Combo-Box Fields


Many fields in Alfabet are defined by means of a combo box with a drop-down list. The drop-down list may be blank the first time you encounter it. Click the arrow to open the drop-down list. You can select any of the options available. If the first line in the list is blank, you can select the blank line if no value should be defined.


You can either select the object in the drop-down list or enter text in the field. A list of potential matches will be displayed in a list and updated with each additional letter typed in the field. The object must be explicitly selected in the drop-down list for the data to be entered in the field.


## Defining Filters with Two Fields

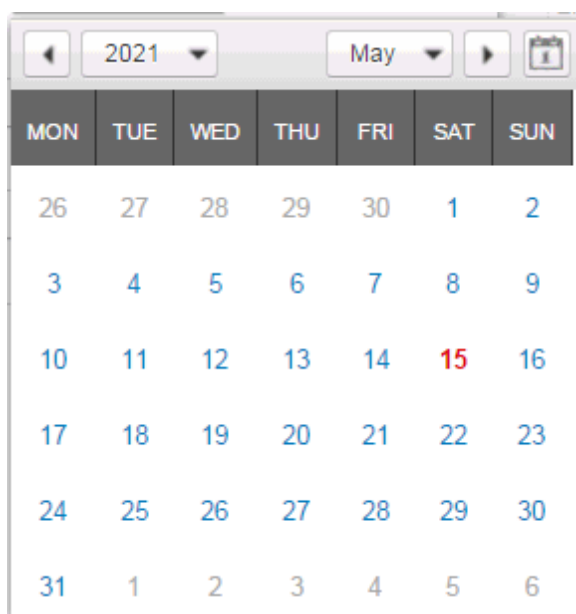
Some filters are made up of two fields. In the first you select an option and in the adjacent field you define the value you are searching for. The example above shows a date selector, but you may encounter other selector fields, such as an object selector or other search mechanism.

## Defining Calendar Fields

Date filters usually display a **Calendar**  symbol. You can either enter a date in the field or click the **Calendar** symbol to open a drop-down calendar.

 Please note that the dates in editor fields are always displayed as a numeric value, regardless of the configured date format. For example, the date format 22 August 2006 displayed in the object profile will be displayed as 22/08/2006 in the editor field.

 The formatting of dates (for example MM/DD/YYYY vs. DD.MM.YYYY) and numbers is determined by the culture used to render the interface. Please note that the culture configuration supersedes the regional settings of the client machine. For more information about specifying cultures, see the section *Specifying the Cultures Relevant to Your Enterprise* in the chapter *Localization and Multi-Language Support for the Alfabet Interface* in the reference manual *Configuring Alfabet with Alfabet Expand*.

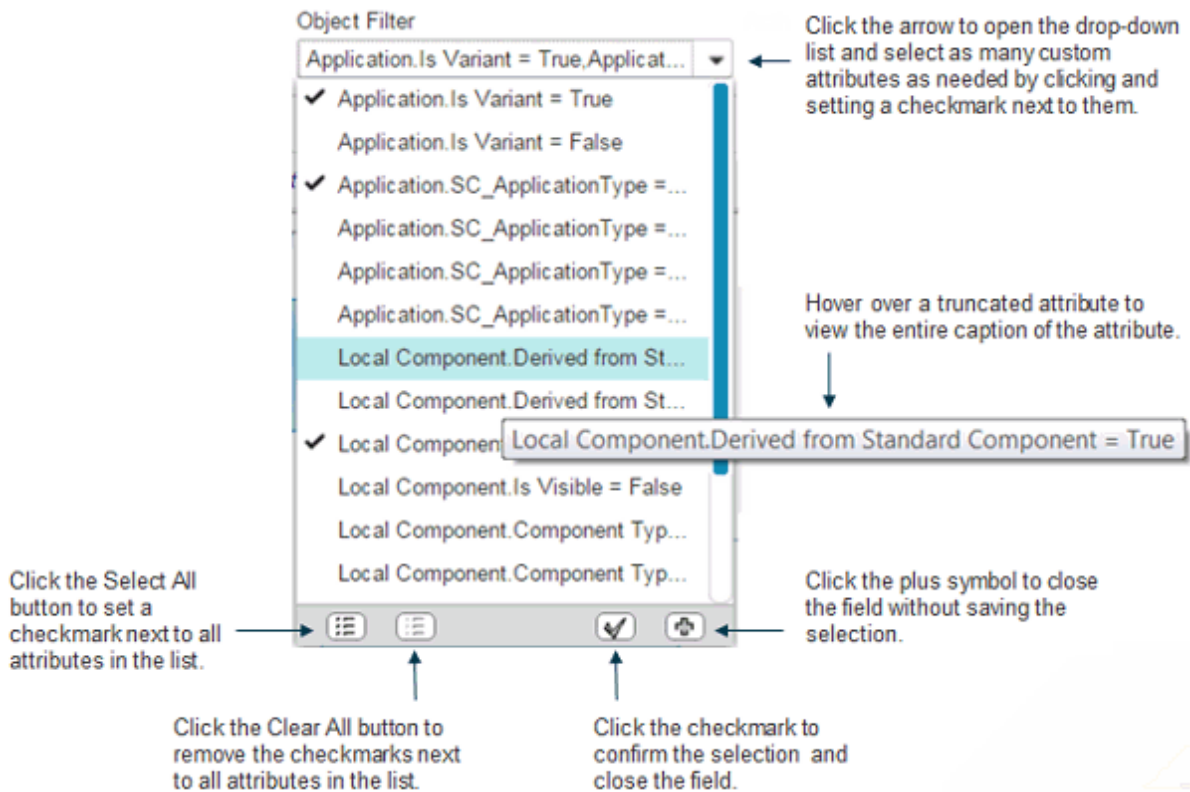


When you open the calendar, you will see the current date circled in red. You can do the following:

- Click a date to select it. The date will be automatically displayed in the date field.
- Click > to move forward one month.
- Click < to move back a month.
- Click the arrow next to the name of the month to open a drop-down list with all of the months. Select a month from the list.





- Click the arrow next to the year to open a drop-down list with years. Select a year from the list

### Defining Multiple Selection Combo Box Fields



A multiple selection combo box is often available in diagrams as well as other views and is often labelled **Object Filter**. This field displays standard or custom attributes that are configured to be searchable and that are either 1) of the type `String` and have an enumeration assigned or 2) of the type `Boolean`. Searchability of properties is configured by your solution designer in the configuration tool Alfabet Expand. For more information on configuring custom properties, see the section *Configuring Custom Properties for Protected or Public Object Classes* in the reference manual *Configuring Alfabet with Alfabet Expand*.

Custom properties are written using the convention: `<ClassName>.<CustomPropertyName> = <Custom-PropertyValue>`


- Click the arrow symbol to open the drop-down list. If the attribute text is cut off, you can point your mouse at it to display a tooltip showing the entire text.
- Set a checkmark next to one or more attributes or click the **Select All**  button to select all attributes. You can remove a checkmark by clicking the **Clear All**  button to remove the checkmark from all attributes.
- Click the **Confirm Selection** button  to confirm your selection or click the **Cancel Selection**  button to close without making the selection.

## Working with Data in Tabular Datasets


The majority of views in Alfabet use tables to display data. Users are typically able to create objects in these views but tables also allow data to be understood and analyzed. Each column in a table represents an attribute associated with the object class you are currently working with. The size of columns will be determined by the content of the cell and the overall width of the Alfabet interface. If you resize the Alfabet interface, you must refresh the browser to automatically resize the columns.



Please note that you may be able to add or hide columns to the view, reorder the columns, and freeze selected columns in the view if the **Configure** button is displayed in the toolbar. The **Configure**  button is displayed in the toolbar of views that support user-specific configuration.


The **Configure**  button is only available for relevant views if the **Allow User-Specific Configuration** attribute to be set to `True` in the server alias setting. For more information about configuring the server alias, see the section *Configuration Attributes for the Alfabet Components* in the reference manual *IT Governance, Risk and Compliance*.


You can do the following when you work with a table:

- Sort the data in the table based on the contents of a column. To do so, click the column caption. For example, click the **Name** column to sort the data alphabetically or click a **Start Date** column to sort the data chronologically according to its start date. An arrow is displayed next to the column caption indicating whether the sort is in an ascending or descending order.
- Filters are available for the columns in a dataset that allows the user to display only relevant data and hide entire rows that do not meet the filter criteria. To add a filter to a column, point to a column header in a standard view or configured report displaying simple datasets to display the filter. When the filter  is clicked, a small pop-up window opens that allows you to specify the criteria for the content in the column. You can enter a string and specify criteria such as **Starts With**, **Contains**, and **Case-Sensitive**. The option **Show and Select Matches** allows matching criteria to be displayed in a selector in the filter pop-up. Select one or more results to display in the dataset. Please note that the filtering capability is not available in grouped datasets that can be expanded and collapsed.
- Adjust the column size by pulling on the column outline. This provides a cleaner and easy-to-read view of cells with long texts. Any number of column and row headers can be frozen to better understand content in any location of a table.



Please note that you can specify the default number of characters to display in columns in datasets in order to improve the handling of data in columns in the **Max. Dataset Cell Text Length** attribute of your user settings. Any characters after the specified number will be truncated but you can point to the cell to display a tooltip with the complete text or access the full information about the object by using the preview functionality. For more information, see the section [Defining Your User Settings in Alfabet](#).



- Re-order the columns using drag-and-drop in order to adapt the table view to fit your information needs. To manually change the sequence of the columns directly in the dataset, click a column caption and drag-and-drop it onto the column it should precede. This is available for configurable standard reports as well as reports in which the **Configure**  button is displayed in the toolbar.
- Any number of column and row headers can be frozen to better understand content in any location of a table. Columns in a standard view or configured report displaying a tabular dataset can be specified to be fixed and retain their default size. For views with a high number of columns, a

scrollbar will be displayed only below the columns that are not fixed. To specify the columns that shall be frozen, click the **Configure**  button and carry out the following:






- In the **Presentation Object Configuration** editor, specify the sequence of the columns in the view by selecting an object class property and clicking the **Up** and **Down** buttons. Repeat this step until all object class properties specified as visible are in the correct sequence.
- To freeze columns so that they cannot be resized or resequenced in the view, select the number of columns that shall be frozen in the dataset in the **Number of Fixed Columns** field. The columns will be frozen starting with the first column on the left. The fixed columns cannot be manually resized or resequenced.



If the **Number of Fixed Columns** attribute is defined in the **Presentation Object Configuration** editor and a view is exported to PDF, the specification of the **Number of Fixed Columns** attribute might be ignored and the dataset will be exported as a normal table without fixed columns. Please note that the fixed column definition will only be dropped if the number of fixed columns makes paging of the table across multiple PDF pages impossible with a row header repetition logic. If this is undesired, the user is advised to select a different paper format and rerun the export.

- 25011 If the **Number of Fixed Columns** attribute is defined in the **Configure View** editor and a view is exported to PDF, the specification of the **Number of Fixed Columns** attribute might be ignored and the dataset will be exported as a normal table without fixed columns. Please note that the fixed column definition will only be dropped if the number of fixed columns makes paging of the table across multiple PDF pages impossible with a row header repetition logic. If this is undesired, the user is advised to select a different paper format and rerun the export.
- Hide columns with data that is not relevant to your information needs. To add or hide columns in the dataset, click the **Configure**  button. In the **Presentation Object Configuration** editor, set a checkmark in the **Visible** column to add a column. Clear the checkmark to hide the column. The following columns are displayed in the **Presentation Object Configuration** editor.
  - **Class:** The name of the object class. In some views, data may be displayed for more than one object class. The name is not identical to the caption usually displayed for the object class on the user interface.
  - **Visible:** The column will be displayed in the view for each property that has a checkmark.
  - **Property:** The name of the property that can be displayed in the table.
  - **Caption:** The caption of the property that is displayed in the user interface. The caption will be used as the header of the column.
- To manually resize the columns directly in the dataset, drag the column border left or right as needed. The column size is stored in the user context settings and will be displayed when the user accesses the view in the next user session.
- Freeze any number of column and row headers to better understand content in any location of a table. Columns in a standard view or configured report displaying a tabular dataset can be specified to be fixed and retain their default size. For views with a high number of columns, a scrollbar will be displayed only below the columns that are not fixed. Please consider the following:
  - In standard views: To specify columns so that they are cannot be manually resized or resequenced in the view, click the **Configure**  button and select the number of columns

that shall be frozen in the dataset in the **Number of Fixed Columns** field. The columns will be fixed starting with the first column on the left.

- In configured reports: The number of freeze header columns is defined by the solution designer during configuration of the report and cannot be changed by the user.
- Expand or collapse the content if the data is hierarchical. If the second column on the left displays numbers in boxes, then you are working in a page view with grouped datasets. The data in the table is hierarchical and has as many levels as boxed numbers displayed in the header of the first table column. There are two ways to expand the subordinate levels of the table:
  - To expand a level for all objects, click that number in the column header. For example, if the column has three levels, click the 3 to display the first, second, and third levels for all objects with subordinate levels.
  - To expand a level for a single object, click the  symbol next to the object to display its subordinate level. You may need to repeat this procedure to expand all subordinate levels below the object. Click the  symbol to collapse that level of the table.
- In page views displaying large datasets, the first 100 of those results will be displayed directly in the page. You can navigate to a next page showing the next 100 results by means of the floating toolbar in the lower right corner of the page view and navigate to the next page, previous page, first page, or last page of results. The paging is also available in views with large grouped datasets.
- To open an object's preview, click the object in the table and hold. In the pop-up, click **Show Details** to open the object profile or, if relevant, click **Operations** and select an option. The preview will display all attributes that have been defined and are configured to be displayed for the class setting. If no values are defined for the object's attributes, then per default only the name and description, and if applicable, object class stereotype will be displayed in the preview.
- To navigate to the object profile, double-click the object in the table. Please note that the double-click action is reserved only for navigation. If you double-click an object and nothing happens, then navigation is not possible for the object.
- The floating toolbar is displayed per default in the lower right-hand corner of the view. The floating toolbar contains buttons to zoom or show the legend. The **Collapse**  button allows the floating toolbar to be minimized to reduce the amount of space that it takes up. The collapsed floating toolbar can be maximized again via the **Expand**  button. The floating toolbar can also be moved by dragging-and-dropping it to a new location within the view. Click the **Print**  button. For more information about printing in Alfabet, see the section [Printing a View in Alfabet](#).

## Working with Diagrams

Diagrams can provide a variety of information about the IT landscapes they visualize. For example, diagrams can depict the applications supporting a business process, devices in a device group, platforms in the platform architecture, or the business services requested by a business process. The display of qualitative information combined with the navigation through object hierarchies allows the user to effectively and efficiently analyze problem zones that might exist in your company's architecture as well as pinpoint problems at the lowest level of granularity. Diagrams can be exported as HTML, SVG or PPT files. Exported diagrams will include any graphic images in the diagram as well as the diagram legend.

In Alfabet, some diagrams such as information flow diagrams are automatically generated. Other diagrams must be designed by a user with access permissions to the Alfabet Diagram Designer. For more information about working with the Alfabet Diagram Designer, see the reference manual Alfabet Diagram Designer.

Depending on the diagram type you are working with, Alfabet diagrams may feature any of the following:






- Filters that allow you to hide information that you don't want to see
- Computation and display of indicators defined for objects displayed in the diagram
- Navigation through the object hierarchy of the objects displayed in the diagram.
- Coloring that provides an additional layer of information to the diagrams.
- Custom icons on objects in the diagram.
- Access to the Alfabet Diagram Designer via the **Open Diagram** button. Diagrams can be designed and edited in the Alfabet Diagram Designer.

Keep the following in mind when working with diagrams:









- To open an object's preview, click the object in the diagram and hold. Click **Show Details** to open the object profile or, if relevant, click **Operations** and select an option.
- To navigate to an object's object profile, double-click the object in the diagram. Please note that the double-click action is reserved only for navigation. If you double-click an object and nothing happens, then navigation is not possible for the object.
- To navigate to the object profile of the information flow, click the source or target end of the information flow. This is especially helpful if multiple information flow are on top of one another.



If an excessively high number of objects is displayed in an automatically-generated diagram, the information flows may be stacked on top of each other in the diagram, thus hiding some information flow attributes. This is a result of the limitations of processing complex diagrams by the third-party layout engine.

- To view the diagram of an object displayed in the current diagram, click the dark blue **Navigate**  icon on the lower-right corner of the diagram object. The name of the target diagram and its base object will be displayed in the tooltip for the **Navigate**  icon. Please note that navigation to diagrams is not supported for connections. Alternatively, you can click the diagram object and click the **Drill Down to Object Diagram**  button in the toolbar. If a diagram is defined for the object, you will see that diagram. If no diagram is defined for the object, the object profile will be displayed. You can repeat this procedure to navigate further through the object hierarchy. To return to the initial diagram that you started with, click your browser's **Back** button.
- To open an object's preview, click the object in the diagram and hold. In the pop-up, click **Show Details** to open the object profile.
- In many diagrams, you will see the **Calculate Indicators**  button. This functionality allows you to automatically generate the values for indicators for which computation rules have been configured. To update computed indicators, click the **Calculate Indicators**  button. The indicators are persistent and will be visible the next time a user views this page view. Please note the following when working with computed indicators:



- Indicator values are not typically automatically updated. You may need to recalculate them periodically to display updated values.
- The definition of indicator types and evaluation types are cached in Alfabet to provide better performance. Consequently, any changes to these definitions may result in a few minutes delay before the computed indicators are available to the user community.
- To export the diagram, click the **Export**  button in the toolbar and select an export format. For more information about exporting diagrams, see the section [Exporting Data](#).
- The floating toolbar is displayed per default in the lower right-hand corner of the view. The floating toolbar contains buttons to zoom or show the legend. The **Collapse**  button allows the floating toolbar to be minimized to reduce the amount of space that it takes up. The collapsed floating toolbar can be maximized again via the **Expand**  button. The floating toolbar can also be moved by dragging-and-dropping it to a new location within the view. The following may be possible in the floating toolbar:
  - To print the diagram, click anywhere in the diagram pane to activate the floating toolbar. Click the **Print**  button. For more information about printing in Alfabet, see the section [Printing a View in Alfabet](#).
  - To view the legend, click anywhere in the diagram pane to activate the floating toolbar. Click the **Legend**  button.
  - To return the zoom factor to 100%, activate the floating toolbar. Click the **Original Size**  button.
  - To zoom in, activate the floating toolbar. Click the **Zoom In**  button and to zoom out click the **Zoom Out**  button. Zooming in is especially useful in order to read the detailed information displayed on user items when a diagram view is selected.

The following information is available:

- [Designing a Diagram](#)
- [Interpreting a Diagram](#)

## Designing a Diagram

The Alfabet Diagram Designer component is automatically installed with Alfabet and can be accessed in the Web browser. To design a diagram, users must be able to open the Alfabet Diagram Designer by means of the **Open Diagram** button available in the relevant page views in Alfabet. Access permission to the Alfabet Diagram Designer is controlled via the **Has Access to Diagram Designer** attribute available in the **User** editor. If a checkmark is set for the **Has Access to Diagram Designer** attribute in the **User** editor, the **Open Diagram** button will be displayed in all relevant diagram page views that the user has access to and the user can thus open the Alfabet Diagram Designer to design or edit the diagram. If a checkmark is not set for the **Has Access to Diagram Designer** attribute in the **User** editor, the **Open Diagram** button will be hidden in all diagram page views that the user has access to. In this case, the user can only view the diagram but not alter the design. The default value of the **Has Access to Diagram Designer** attribute is **False**.

To open the Alfabet Diagram Designer, click the **Open Diagram** button in the relevant diagram page view. Once a diagram has been designed and saved in the Alfabet Diagram Designer, all users with relevant access permissions may view the diagram in Alfabet. Click **Update** to update the diagram with the most recent changes.

Designing diagrams is a very involved process and is explained in detail in the reference manual *Designing IT Landscape Diagrams in Alfabet*.

## Interpreting a Diagram

Diagrams in Alfabet provide a wealth of information about the objects displayed in the IT landscape. The following provides general information to help you understand and interpret diagrams in Alfabet. Please refer to the context-sensitive online Help for detailed information about a specific diagram.

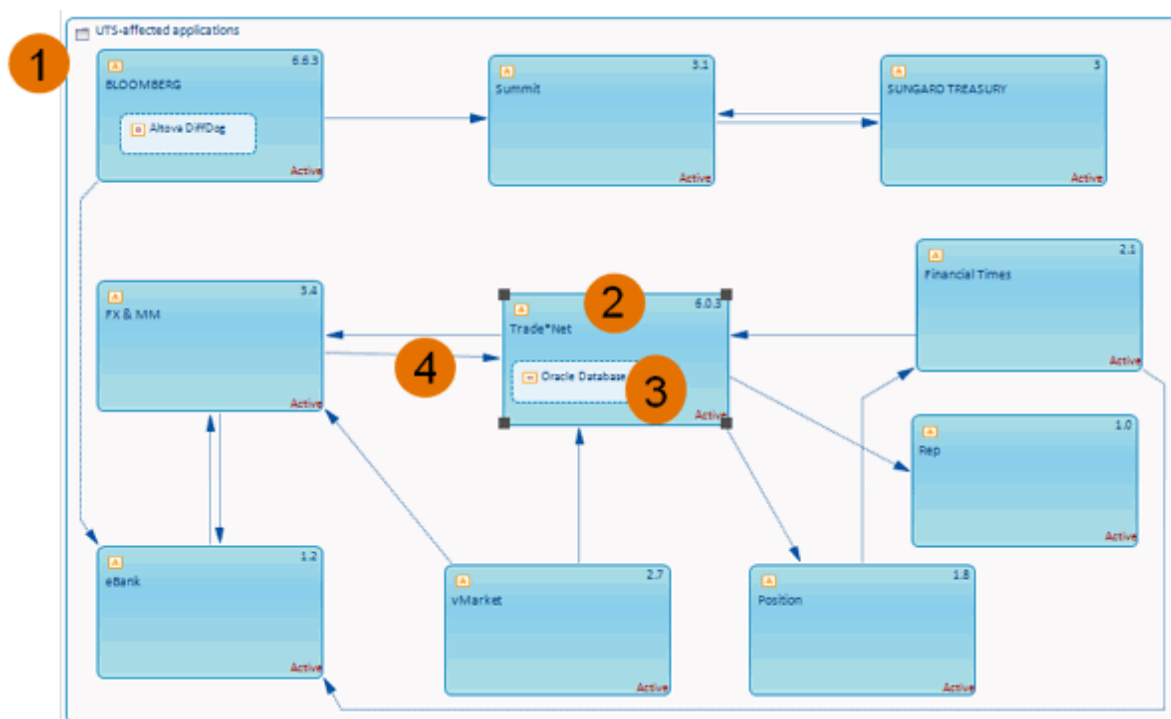


FIGURE: Diagram with application landscape

The diagram shows the application landscape for a selected application group. The following objects are displayed:

- 1) the application group UTS-affected applications
- 2) the application Trade\*Net
- 3) the local component Oracle Database
- 4) incoming and outgoing information flows

When you first open a page view displaying a diagram, you will typically see a default view. If the view is empty, then a diagram has not yet been designed for the selected object.

You can define the filters available for the diagram in order to add or remove information in the diagram. You must click **Update** to refresh the diagram with the new filter settings. The next time you open the diagram, the diagram will be displayed with your most recent settings.

The filters available will vary depending on the type of diagram that is being displayed.

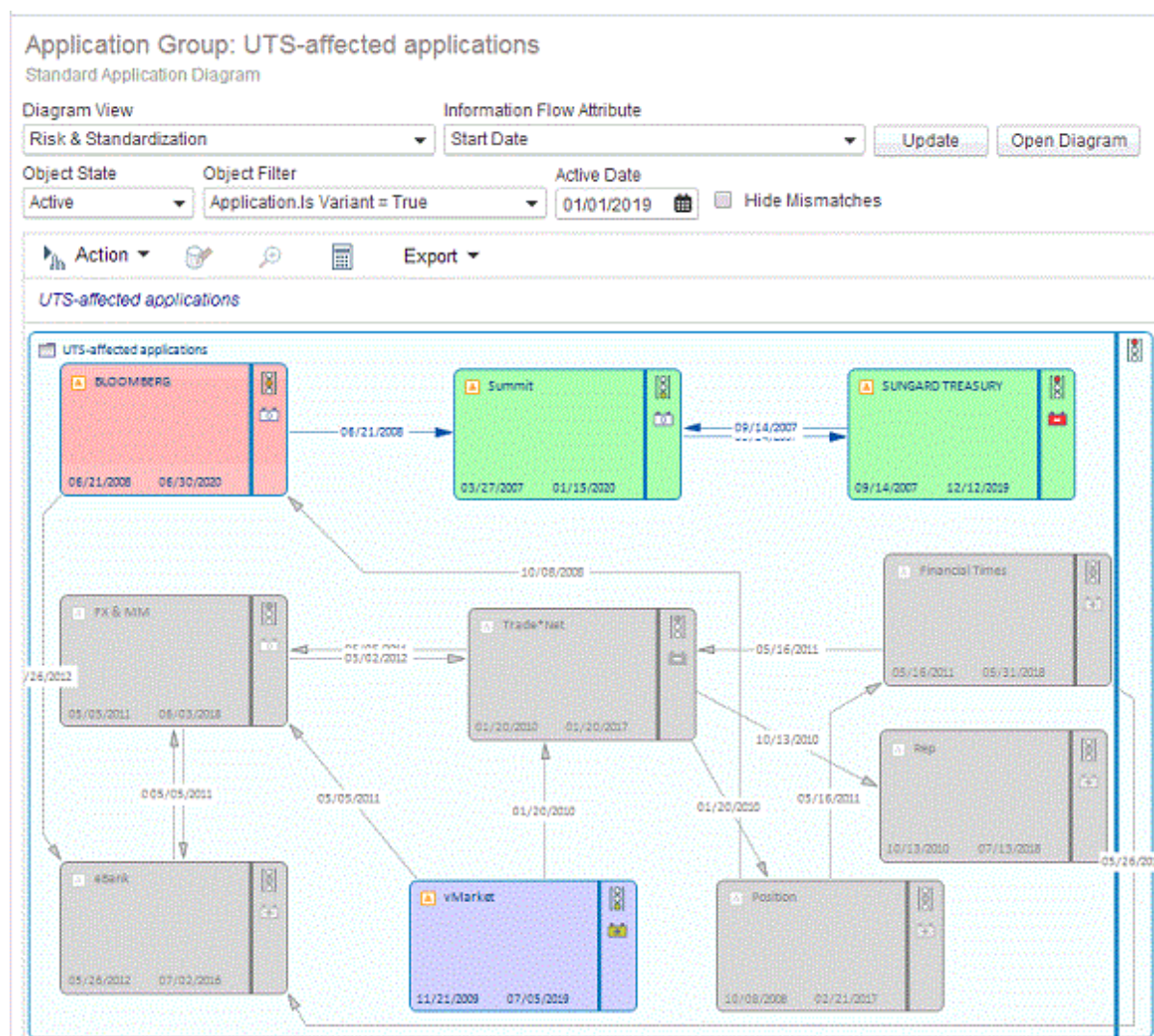


FIGURE: Diagram with filters defined

In the diagram above, only the filters **Information Flow Attribute**, **Object State**, and **Active Date** have been defined. All objects that do not match the filter criteria are greyed out. The following filters are typical for many page views displaying diagrams:

- **Diagram View:** Specify a configured diagram view that superimposes qualitative information - such as indicators - on the objects in the diagram. In this example, color rules have been configured for the diagram view and as a result, objects fulfilling the color rule are colored. For more information about the configuration of diagram views, see the section *Configuring Diagram Views for Diagrams* in the reference manual *Configuring Evaluation and Reference Data in Alfabet*.
- **Information Flow Attribute:** Specify an information flow attribute to display on the information flows. The attributes that are available in this field are configured by your solution designer. For more information about configuring the attributes available in this field, see the section *Configuring the Visualization of Connection Items and Subordinate Object in Diagrams* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- **Object State:** Specify the object state for the objects visualized in the diagram. Any objects that do not meet the setting will be greyed out.

- Object Filter:** Select one or more attributes to determine the objects displayed in the diagram. An object will be displayed if it satisfies at least one of the checked attributes. The attributes that are available in this field are configured by your solution designer. The **Object Filter** field displays standard or custom attributes that are configured to be searchable and that are either 1) of the type `String` and have an enumeration assigned or 2) of the type `Boolean`. The selected attributes are combined with an OR property. Any objects that do not meet the setting will be greyed out. For more information about configuring custom properties, see the section *Configuring Custom Properties for Protected or Public Object Classes* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- Active Date:** Specify a date to display all objects for which the selected date is within the object's active period (as defined by its start and end date). Any objects that do not meet the setting will be greyed out.
- Hide Mismatches:** Set a checkmark to simplify the visualization by removing the greyed out objects from the diagram.

The **Diagram View** filter has been defined in the diagram displayed below.

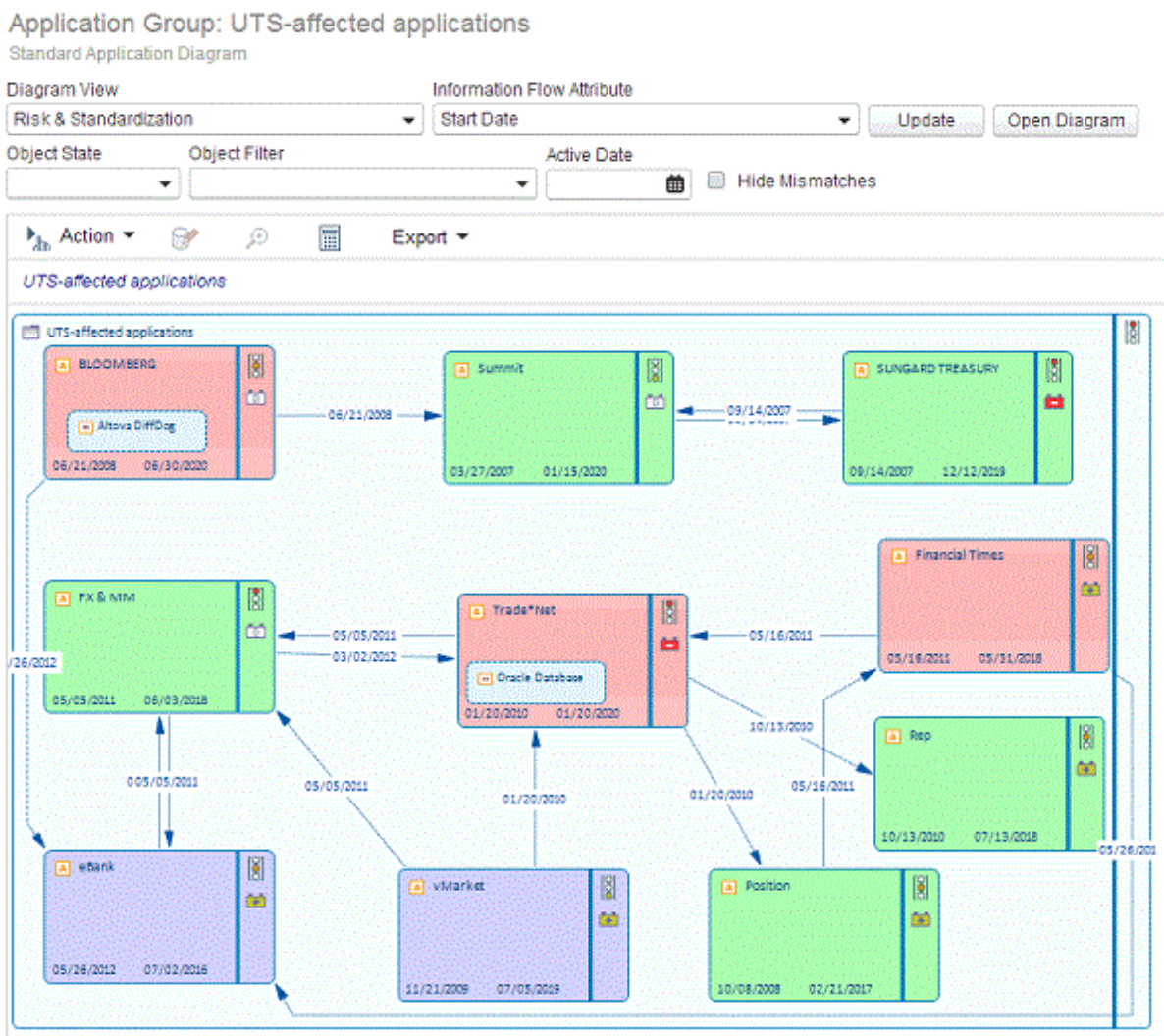


FIGURE: Diagram view

A diagram view is a configuration that is associated with a diagram. It allows users to superimpose qualitative information - such as aggregated indicators or attribute values - associated with these architectural

elements. The applications in the diagram above have two indicators displayed on the right and the start and end dates of the application displayed on the bottom of the object. A diagram view may include up to four indicators and four attributes per object class. If you do not see indicators in the diagram, then either no indicators have been configured for the object classes visualized in the diagram, no indicators have been defined for the objects displayed in the diagram, or no appropriate diagram view was selected in the **Diagram View** field.

In addition to the indicators and attributes that have been added via the diagram view definition, the objects have also been highlighted with different colors. In this case, color rules are also associated with the diagram view. Color rules constitute queries that color a objects that fulfill the query criteria. In the example, color rules have been configured to highlight different types of applications based on the definition of the **Application Type** attribute. In this case, color rules are defined to highlight 1) applications of the type Client Server, 2) applications of the type eBusiness, and 3) applications of the type Mainframe. The diagram items representing applications display a considerable amount of information about the applications.

In order to understand the information displayed on an object in the diagram, you can click the **Legend** button in the floating toolbar in the bottom right corner of the diagram.

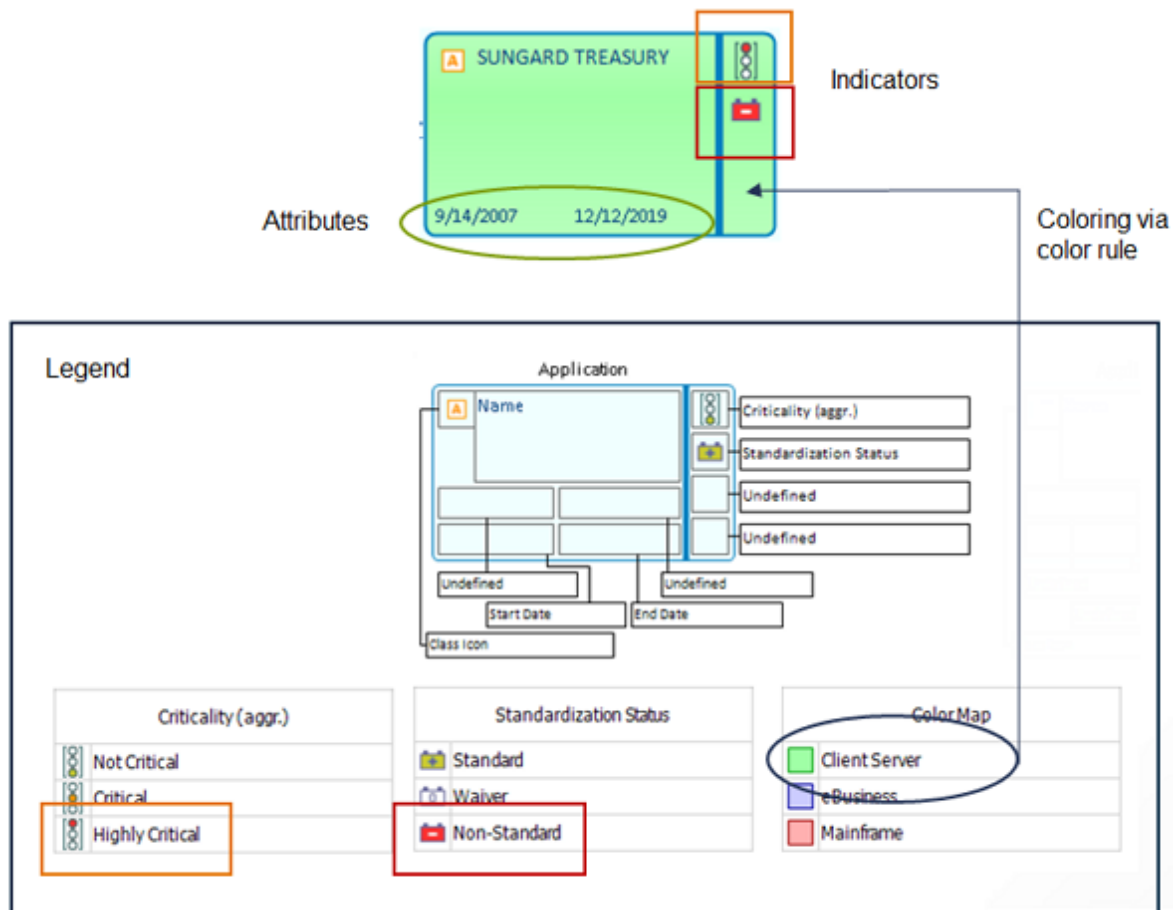


FIGURE: Object in diagram and legend with explanation

The image above demonstrates how to interpret the information on a diagram item by means of the legend. The application Sugared Treasury has a start date of 9/14/2007 and an end date of 2/12/2019. It has an aggregated indicator named Criticality which has a value of Highly Critical and an indicator Standardization Status which has the value non-Standard. The application is colored green by means of a color rule, which indicates that the application is of the type Client Server.



The following prerequisites must be fulfilled in order to work with diagram views and indicators in diagrams:

- In order to display indicators on the objects in a diagram, evaluation types and their indicator types must first be configured in the **Evaluations and Portfolios** functionality and then assigned to the respective object class in the **Class Configuration** functionality. For more information, see the chapter *Configuring Evaluations, Prioritization Schemes, and Portfolios* in the reference manual *Configuring Evaluation and Reference Data in Alfabet*.
- In order to select a diagram view and superimpose preconfigured information on the objects in the diagram, diagram views must first be configured in the **Diagram Views** functionality. For more information, see the chapter *Configuring Diagram Views for Diagrams* in the reference manual *Configuring Evaluation and Reference Data in Alfabet*.
- In order to display meaningful indicators on the objects in a diagram, indicators must be defined and updated for the evaluation types relevant to each object in the diagram. For more information about defining and updating an object's indicators, see the *Evaluation Page View* for the relevant object.

Please note the following prerequisites to display color rules in a Alfabet diagram:

- Color rules must first be specified in the **Color Rules Manager** functionality and assigned to the relevant diagram view in the **Diagram View** functionality. For more information, see the chapter *Configuring Color Rules for Map Views and Diagram Views* in the reference manual *Configuring Evaluation and Reference Data in Alfabet*.
- Once a color rule is defined, it must be activated in order for the Alfabet query to be executed. The query should be re-activated periodically in order to update the query results and include changes made to the database. The color rule may be manually activated in the **Color Rules** view or activated via a batch process. For more information about activation via a batch process, see the section *Batch Evaluation of Color Rules with RescanColorRules.exe* in the reference manual *System Administration*.

## Working with Portfolio Reports

A portfolio is a bubble chart that represents the relative performance of a set of objects that belong to the same object class in two or three independent dimensions of measurement. Typical portfolios include a group of applications that are owned by a specific organization or used by a particular process.

The portfolio consists of an X-, Y-, and if necessary, power-axis. The power-axis is the Z-dimension and is reflected via bubble size. Either an indicator type, evaluation type, or prioritization scheme can be assigned to a portfolio axis. In Alfabet, a portfolio may also be displayed as a BCG quadrant. Access to portfolios can be controlled via user profiles. A user can view any portfolio that has either no user profile defined or the same user profile as that which he/she is currently logged in with.

A number of different portfolio reports are available in Alfabet that allow you to visualize and analyze your IT landscape. The following displays an example of a typical portfolio. - a Business Service Portfolio in which all business services provided by a selected application are displayed:



FIGURE: Typical portfolio in Alfabet












The figure displays seven business services provided by the application 360T 1.1 Variant 1.1. Service Portfolio is the configured portfolio selected in the **Show Portfolio** field. The prioritization schemes Technical Alignment and Performance are defined for the selected portfolio and represent the X- and Y-axis in the report. The prioritization scheme for the Z-dimension, which is displayed via the bubble size, is Business Value (and is identified with its numeric value in the bubble's tooltip).

The report shows that the two business services Account Management and Marketing Analytics score in the very high range for both Technical Alignment and Performance, and the large bubble size indicates that it also scores very high for Business Value. The bubbles of the two business services Evaluation Trends and Manage and Analyze Customer's Data have the same value for all three dimensions, indicated by the fact that they both are the same color and are placed on top of each other.

Keep the following in mind when viewing a portfolio report:

- The portfolio chart may display up to three dimensions:
  - The X- and Y-dimensions are displayed on the X- and Y-axis, respectively. The ticks displayed on the X- and Y axes show preconfigured caption names. The default captions Low, Medium, High, and Very High are displayed if no caption names have been configured.
  - The Z-dimension is displayed by means of the bubble size. The larger the Z-dimension, the larger the bubble. Bubbles with the same X- and Y-dimensions are placed on top of each

other. The bubble with the smallest Z-dimension value will have the smallest bubble size and will be placed on top of a larger bubble which will have a larger Z-dimension value.

- When you open the portfolio report, you will see a default view based on the most recent filter settings. To change the information displayed in the portfolio, define the filter settings above the toolbar and click **Update**. If you change the filter settings, the objects may be repositioned in the portfolio and they may be assigned different colors. Available filters may vary depending on the class of the objects displayed in the portfolio.
- To display an object's name, point to the respective bubble to display the tooltip. If a Z-dimension is defined for the portfolio, the name of the prioritization scheme and numeric value will also be displayed.
- To open an object's preview, click-and-hold the object in the portfolio. In the pop-up, click **Show Details** to open the object profile.
- To navigate to an object's profile, double-click the object in the diagram. Please note that the double-click action is reserved only for navigation. If you double-click an object and nothing happens, then navigation is not possible for the object.
- The floating toolbar is displayed per default in the lower right-hand corner of the view. The floating toolbar contains buttons to zoom or show the legend. The **Collapse**  button allows the floating toolbar to be minimized to reduce the amount of space that it takes up. The collapsed floating toolbar can be maximized again via the **Expand**  button. The floating toolbar can also be moved by dragging-and-dropping it to a new location within the view. The following may be possible in the floating toolbar:
  - To print the diagram, click anywhere in the diagram pane to activate the floating toolbar. Click the **Print**  button. For more information about printing in Alfabet, see the section [Printing a View in Alfabet](#).
  - To view the legend, click anywhere in the diagram pane to activate the floating toolbar. Click the **Legend**  button.
  - To return the zoom factor to 100%, activate the floating toolbar. Click the **Original Size**  button.
  - To zoom in, activate the floating toolbar. Click the **Zoom In**  button and to zoom out click the **Zoom Out**  button. Zooming in is especially useful in order to read the detailed information displayed on user items when a diagram view is selected.
- To export the portfolio, click the **Export**  button in the toolbar and select an export format. For more information about exporting portfolios, see the section [Exporting Data](#).
- To edit the color assignment of objects in the portfolio, click the **Colors**  button in the toolbar. You can assign colors to the portfolio objects in the **Object Colors** editor. The color you assign to an object will be displayed for the object in all other business graphics for all other users in the Alfabet community. The visibility of the **Colors**  button will depend on the configuration of your Alfabet solution. For more information about the configuration of the visibility of the **Colors**  button, see the section *Allowing Users to Change the Color Assigned to Objects in Business Graphics* in reference manual *System Administration*.





The following prerequisites must be fulfilled in order to work with portfolios in Alfabet:

- Portfolios must first be configured in the **Evaluations and Portfolios** functionality. In order for an object to display meaningful values in a portfolio, the evaluation types defined for the prioritization schemes displayed in the portfolio must be assigned to the respective object class in the **Class Configuration** functionality. If an object class does not have an evaluation type assigned to it, the objects displayed in the portfolio will show the lowest possible value. For more information about the configuration of portfolios, see the chapter *Configuring Evaluations, Prioritization Schemes, and Portfolios* in the reference manual *Configuring Evaluation and Reference Data in Alfabet*.
- For each object displayed in the portfolio, indicators must be defined and updated for the evaluation types relevant to the portfolio. For more information about defining and updating an object's indicators, see the *Evaluation Page View* for the relevant object.

## Working with Lifecycle Reports and Time Schedules

In Alfabet, Gantt charts are often used to display object lifecycles and time schedules. For reasons of performance, the maximum period of time displayed for lifecycles in Gantt charts is limited to 40 years. The time displayed will be based on 20 years before the current date and 20 years after the current date.



Please note the following:

- The general placement of the current date in the Gantt chart may be configured in Alfabet Expand. For more information, see the section *Configuring Gantt Charts* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- Please note that objects displayed in a lifecycle report can not be sorted based on their version numbers. If this is required for a lifecycle report, then a configured report must be created by your solution designer. For more information, see the chapter *Configuring Reports* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Program: PRJ-31 Streamline CRM Applications

Project Time Schedule (Gantt)

Status

Described, Reviewed

Update

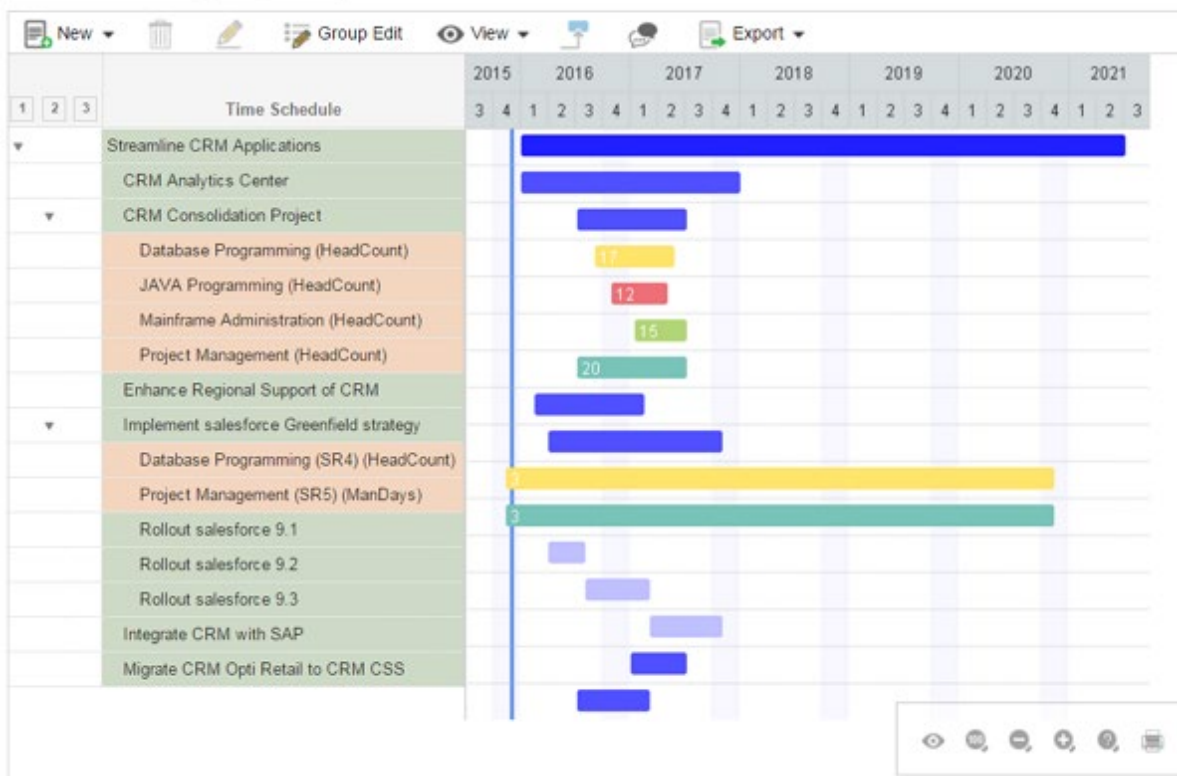












FIGURE: Time schedule for a project

The time schedule shown above displays the scheduling for various projects and sub-project as well as for the skills required for the projects. Please keep the following in mind when reviewing a time schedule:

- When you open the time schedule, you will see a default view based on the most recent filter settings. To change the information displayed in the view, define the filter settings above the toolbar and click **Update**. If you change the filter settings, the objects may be repositioned.
- The time scale used to display the data is managed through the **Zoom In**  and **Zoom Out**  buttons in the floating toolbar. The zoom functions allow you to switch between the time scales of weekly, monthly, quarterly and annually relevant for the view and thus control the granularity of information displayed.
- The time schedule typically displays various types of objects in a hierarchical table layout.
- The various time spans are displayed as colored bars.
- The blue vertical line denotes the current date.
- To open an object's preview, click-and-hold the object in the time schedule. In the pop-up, click **Show Details** to open the object profile or, if relevant, click **Operations** and select an option.
- To navigate to an object's profile, double-click the object in the time schedule. Please note that the double-click action is reserved only for navigation. If you double-click an object and nothing happens, then navigation is not possible for the object.

- The floating toolbar is displayed per default in the lower right-hand corner of the view. The floating toolbar contains buttons to zoom or show the legend. The **Collapse**  button allows the floating toolbar to be minimized to reduce the amount of space that it takes up. The collapsed floating toolbar can be maximized again via the **Expand**  button. The floating toolbar can also be moved by dragging-and-dropping it to a new location within the view. The following may be possible in the floating toolbar:
  - To print the diagram, click anywhere in the diagram pane to activate the floating toolbar. Click the **Print**  button. For more information about printing in Alfabet, see the section [Printing a View in Alfabet](#).
  - To view the legend, click anywhere in the diagram pane to activate the floating toolbar. Click the **Legend**  button.
  - To return the zoom factor to 100%, activate the floating toolbar. Click the **Original Size**  button.
  - To zoom in, activate the floating toolbar. Click the **Zoom In**  button and to zoom out click the **Zoom Out**  button. Zooming in is especially useful in order to read the detailed information displayed on user items when a diagram view is selected.
- To export the time schedule, click the **Export**  button in the toolbar and select an export format. For more information about exporting time schedules, see the section [Exporting Data](#).
- It may be that enterprise milestones have been defined to document and plan for activities that are critical to the enterprise. Each enterprise milestone will specify a target date and an symbol that represents the milestone. To display enterprise milestones in a time schedule, click **View > Show Enterprise Milestones** in the toolbar. Enterprise milestones are created in the *Enterprise Milestones Functionality*

## Working with Configured Business Support Matrix Reports

Customized business support matrices are configured reports that allow business supports for one or more organizations/market products and business processes/domains to be captured. Every configured business support matrix can be customized for the specific data entry requirements of the user.

Customized business support matrices are advantageous because they simplify the user's task of capturing business supports in a manageable small matrix displaying only the relevant processes and organizations, for example. Furthermore, the customized business support matrix allows a large number of business supports to be easily captured at once for multiple organizations/market products or business processes/domains.

The visualization of the matrix is based on a configured query that finds the relevant objects for the matrix axis. The matrix is created at run-time.

You can export the matrix to an HTML file or an Microsoft Excel file. Please note however that matrices with more than 64000 rows and more than 300 columns cannot be exported to Excel



Because multiple users could simultaneously access a configured business support matrix, it is possible that multiple business support definitions could be made at the same time. If this

occurs, the first user who saves the business support to the database will be the authorized user of the business support.

The following information is available:

- [Understanding the Different Types of Customized Business Support Matrices](#)
- [Defining the Standard Filters in the Configured Business Support Matrix](#)
- [Creating New Business Supports By Means of the Configured Business Support Matrix](#)

### Understanding the Different Types of Customized Business Support Matrices

There are generally two types of configured business support matrices that may be available in Alfabet.

- Object-centric matrices. In this case, the business support matrix allows you to define the business supports for the object that you have selected in the **Select <ObjectClass>** filter located at the top of the view. You could thus capture business supports from the perspective of an application, ICT object, business process, domain, market product, or organization.



In the **Select <ObjectClass>** filter, you should select an object that you have access permissions for. You can only view and edit the business support matrix for an object for which you have the relevant access permissions.

- General matrices. In this case, the application or ICT object providing the business support is embedded in the X- or Y-axis of the matrix.

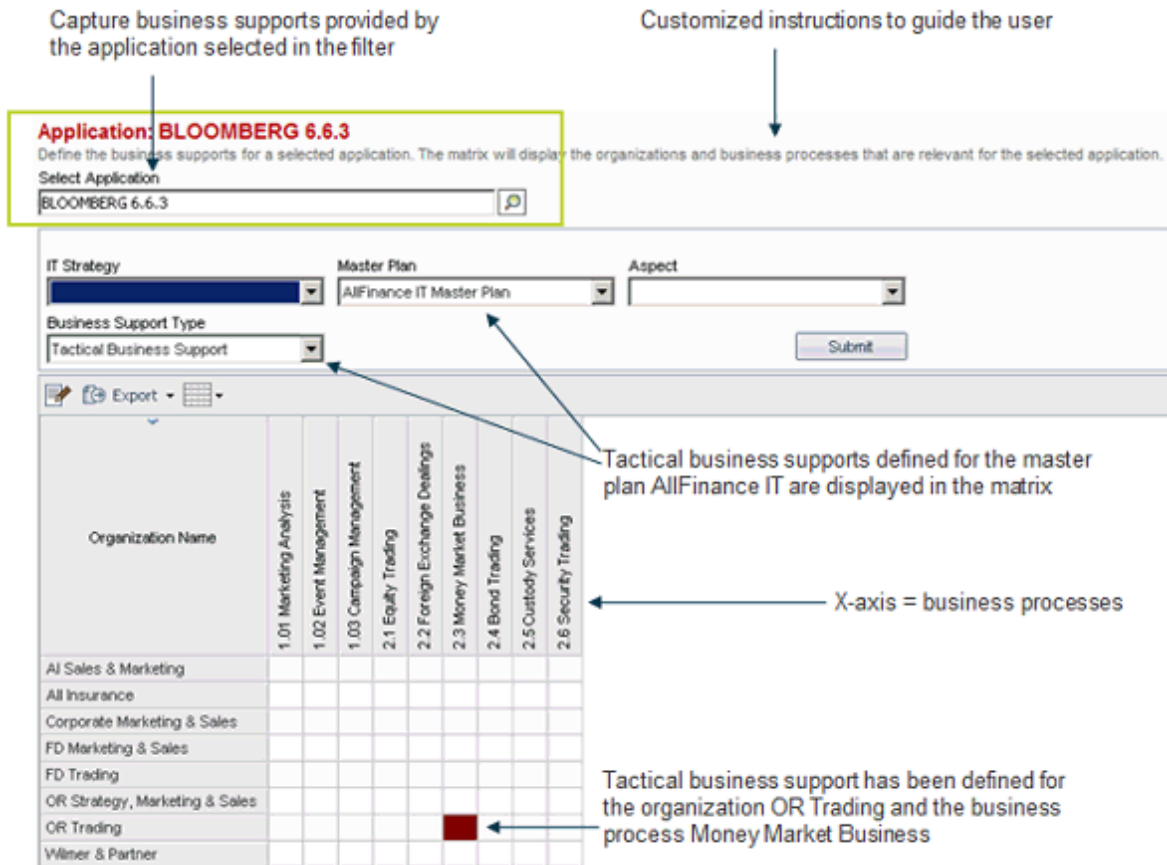


FIGURE: Object-centric matrix to capture business supports provided by a selected application



For example, an application architect may be required to define the business support for the applications that he is responsible for. Typically, his/her area of responsibility will encompass a limited number of business processes relevant to a small selection of organizations. In this case, the application architect would typically work with an object-centric matrix similar to the example below.

The figure above provides an example of a configured business support matrix that is configured for the object class Application. The business processes on the X-axis and the organizations on the Y-axis have been found by the configured query for the selected application.

If the user selects a different application in the **Select Application** field, the query associated with the matrix will typically find a different set of organizations and business processes.

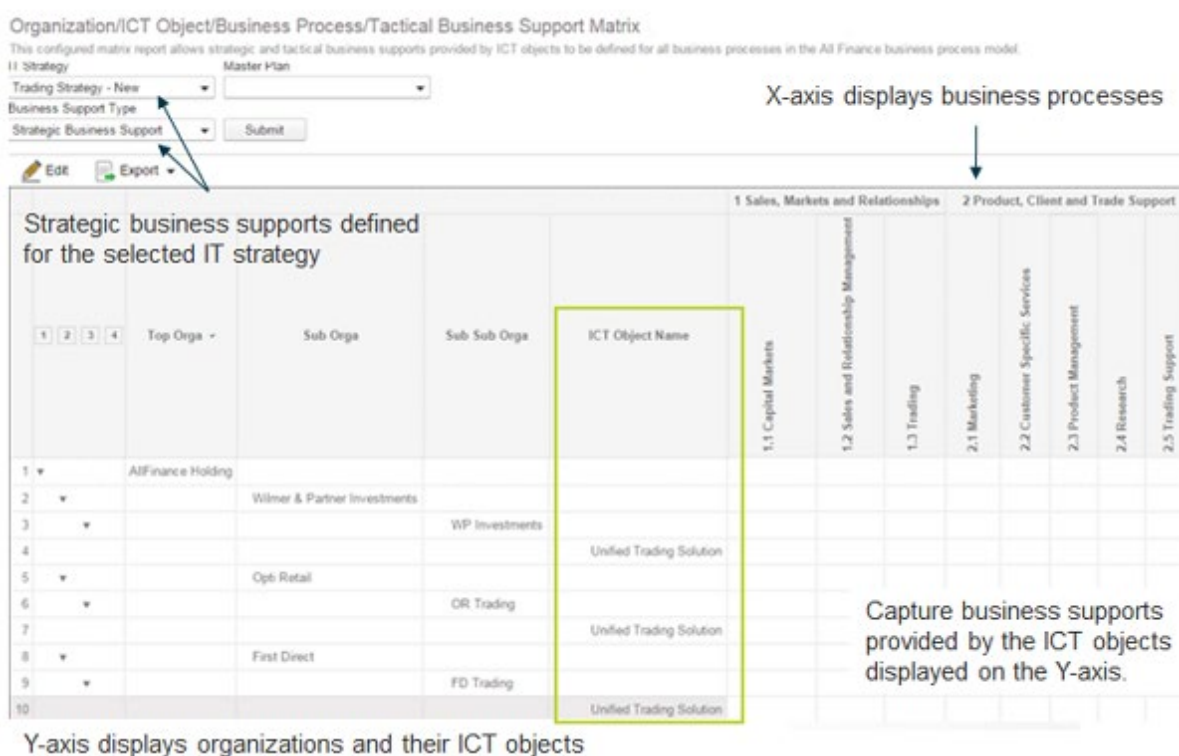


FIGURE: General matrix to capture business supports provided by ICT objects owned by a set of organizations



For example, a strategy planner may be required to define the business support for a set of organizational units. In this case, the strategy planner would typically work with general matrix that displays the relevant organizations and their ICT objects. In this case, the strategy planner might work with a matrix similar to the example below.

The figure above provides an example of a business support matrix that is configured to find the ICT objects owned by a specified set of organizations. The business processes on the X-axis and the organizations and ICT objects on the Y-axis have been found by the configured query.

### Defining the Standard Filters in the Configured Business Support Matrix

The filters allow you to specify the business supports that you see in the matrix as well as the type of business supports that you can capture.

- **Business Support Type:** Select the type of business support that you want to view or define. The business support types available will depend on the configuration of the business support matrix.



You must select a value in the **Business Support Type** field in order to create and save business supports.

- **Master Plan:** Select a master plan in order to display or define tactical business supports for that master plan. Any business supports you define for the selected master plan will be displayed in the standard business support maps associated with that master plan. For more information, see the for the relevant master plan map.

- **IT Strategy:** Select an IT strategy in order to display or define strategic business supports for that IT strategy. The business supports you define for the selected IT strategy will be displayed in the standard business support maps associated with that IT strategy. For more information, see the for the relevant IT strategy map.
- **Aspect Group:** Select an aspect group for the business support matrix. An aspect group is a collection of up to two aspects with predefined aspect values that are relevant for the analysis of business supports in a business support map. Aspect groups allow you to define more precisely how this business support provides services for the processes/products in your enterprise. When you select an aspect group, any business supports you define will be assigned the group's predefined aspect values. Values for the aspects associated with the selected aspect group are visualized on the relevant business supports in standard business support maps.



The filter fields described above are standard fields that will be automatically displayed in the customized business support matrices that are configured by your enterprise. Additional filters may be configured by your solution designer that are not described here.


### Creating New Business Supports By Means of the Configured Business Support Matrix

When you create a business support in a configured business support matrix, the business support's start and end dates will be copied from the application or ICT object providing the support.



Please note that when business supports are created via a configured business support matrix, values such as the object state, start and end dates, and relevance group will be automatically defined per default for the new business supports. If the default definition of a business support must be modified, then you must navigate to the object profile of the business support to edit its properties.

The business supports you can create are determined by the filter settings that you define. To create business supports:

- 1) In the **Business Support Type** field, specify the type of business support that you want to create. Please note the following when defining new business supports:
  - If you select **Operational Business Support**, no other filter settings are required.
  - If you select **Tactical Business Support**, you must select the relevant master plan in the **Master Plan** field for which you want to create tactical business supports for.
  - If you select **Strategic Business Support**, you must select the relevant IT strategy in the **IT Strategy** field that you want to create strategic business supports for.
- 2) In the toolbar, click the **Edit**  button. An editor opens displaying the business support matrix that you are currently working with.
- 3) Click a relevant cell in the matrix to define the business support. For each business support you create, the matrix cell will turn red.
- 4) If the business supports you create for one matrix object are relevant for another matrix object, you can copy the business supports and paste them to the relevant matrix object. For example, if you have defined business supports for a business process on the X-axis, you can copy those business supports to another business process on the X-axis. This applies equally to objects of the same object class on the Y-axis.

- To copy the business supports defined for an object in the X-axis, right-click in the cell for the relevant matrix object in the axis area (grey cells) and select **Copy Row Values**. Right-click the matrix object in the X-axis that you want to copy the business supports to and select **Paste Row Values**.
  - To copy the business supports defined for an object in the Y-axis, right-click in the cell for the relevant matrix object in the axis area (grey cells) and select **Copy Column Values**. Right-click the matrix object in the Y-axis that you want to copy the business supports to and select **Paste Column Values**.
- 5) Once you are ready to save the business supports you have created, click the **OK** button. The editor will close and the data will be saved to the database. To exit without saving your changes, click the **Cancel** button.



Because multiple users could simultaneously access a configured business support matrix, it is possible that multiple business support definitions could be made at the same time. If this occurs, the first user who saves the business support to the database will be the authorized user of the business support.

## Working with Layered Diagram Reports

A layered diagram report is a report configured by your solution designer. The report shows Alfabet objects from various object classes that are related to each other. Each object class is displayed in a separate layer and is related to the objects displayed in the layer directly above and below the current layer. Each object in the report is displayed as a colored box with an indicator icon. Each object in the report is represented by a colored box. The color and indicator symbols represent various dimensions of evaluation. Multiple colors and indicator symbols can be defined per object class in the report.

For example, the colors of an object in an object class may depend on the number of open assignments while the colors displayed for objects of another object class may represent the object's criticality for the business.



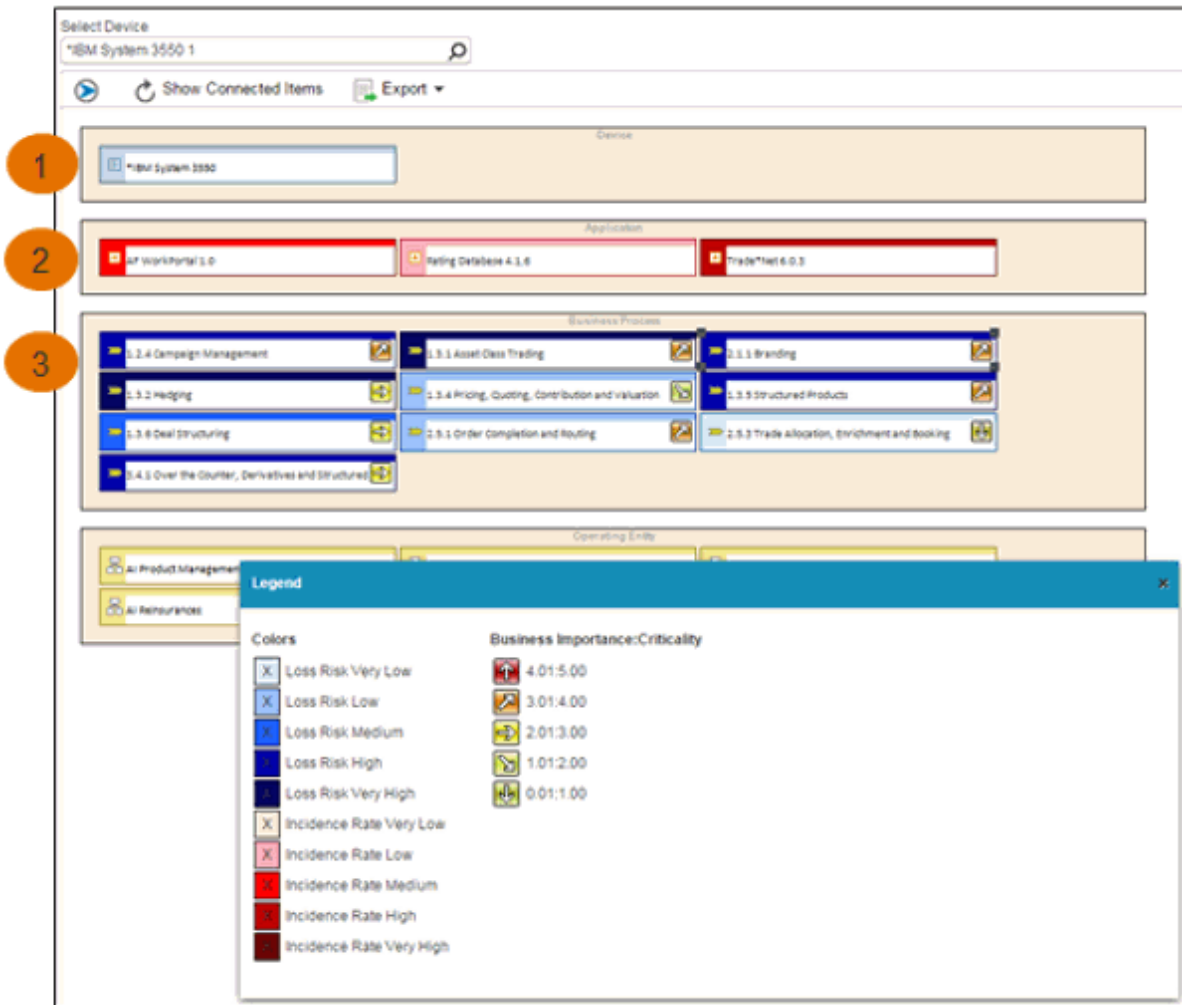


FIGURE: Example of a layered diagram report

In the diagram above:

- The first layer displays the selected device.
- The second layer displays the applications deployed on the device.
- The third layer displays the business processes supporting the application.
- The legend is open and explains the use of colors and indicators. The colors depend on different object attributes in each layer.

To highlight the objects related to a selected object, click an object in the report and click the **Show Connected Items** button in the toolbar. The objects related to the selected objects are displayed in the colors determined by the color definition. Unrelated objects are displayed in grey.

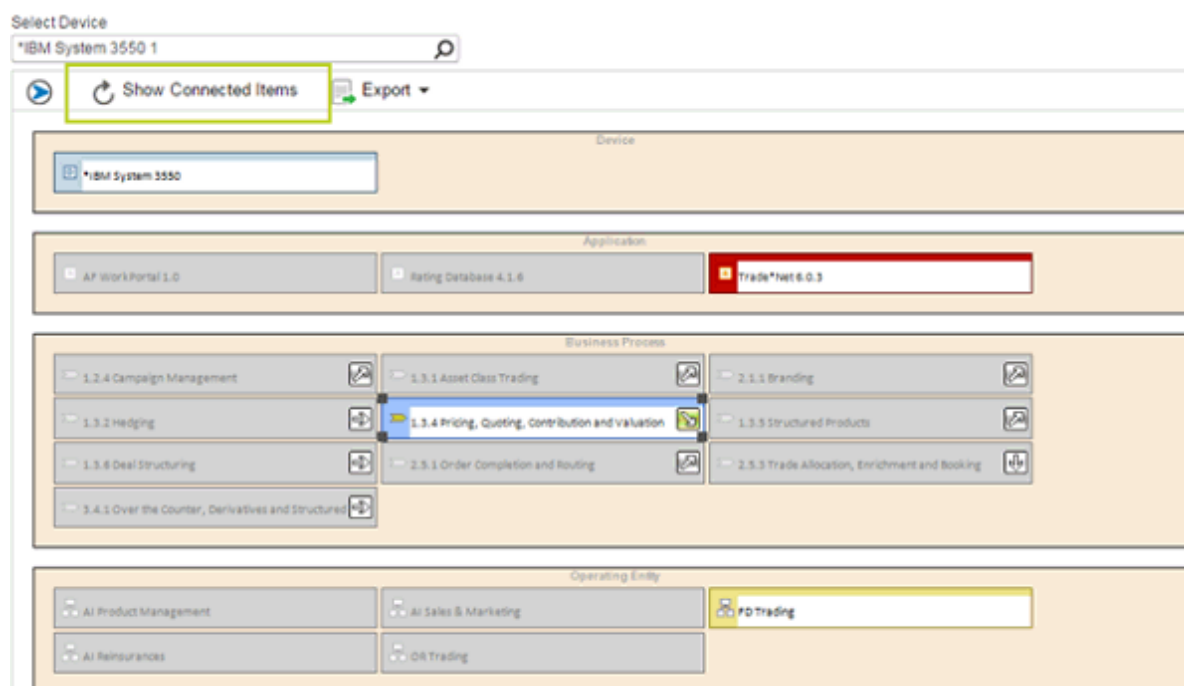


FIGURE: Layered diagram report displaying devices and related objects

Depending on the configuration of your report, you may be able to navigate to an object profile by double-clicking an object. Please note that the double-click action is reserved only for navigation. If you double-click an object and nothing happens, then navigation is not possible for the object. A legend may also be available.

## Working with Tree Reports

A tree report is a report configured by your solution designer. The report shows a bi-directional tree displaying the relations between a selected object and related Alfabet objects.

A base object or a set of base objects is displayed in the center of the tree. Related objects are displayed in as branches pointing in one or two directions. The tree may be configured to branch horizontally or vertically.

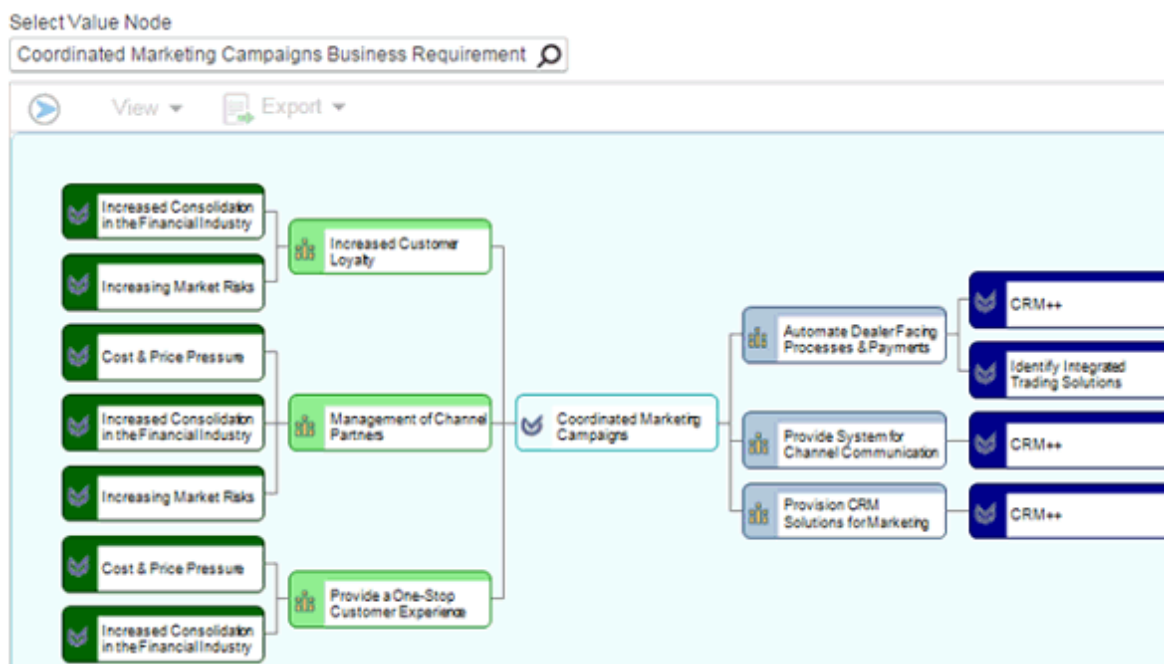


FIGURE: Tree report with two branches

Each object in the report is displayed as a colored box with an indicator icon. Each object in the report is represented by a colored box. The color and indicator symbols represent various dimensions of evaluation. Multiple colors and indicator symbols can be defined per object class in the report.

For example, the colors of an object in an object class may depend on the number of open assignments while the colors displayed for objects of another object class may represent the object's criticality for the business.

A grid report can display multiple trees reflecting relations:

- The report can display more than one object as the starting point for the tree. The trees are then displayed next to each other.
- Multiple tree reports can be displayed in one report view. Each cell in the view may be filled with an individual tree report. The content of a cell is completely independent of the content of other cells in the report. Other objects can be displayed as the tree roots and the trees can reflect other relationships. Colors and indicators may also be specified separately for each cell. This makes it possible to specify multiple aspects of the same object or to compare different relationships with one another.

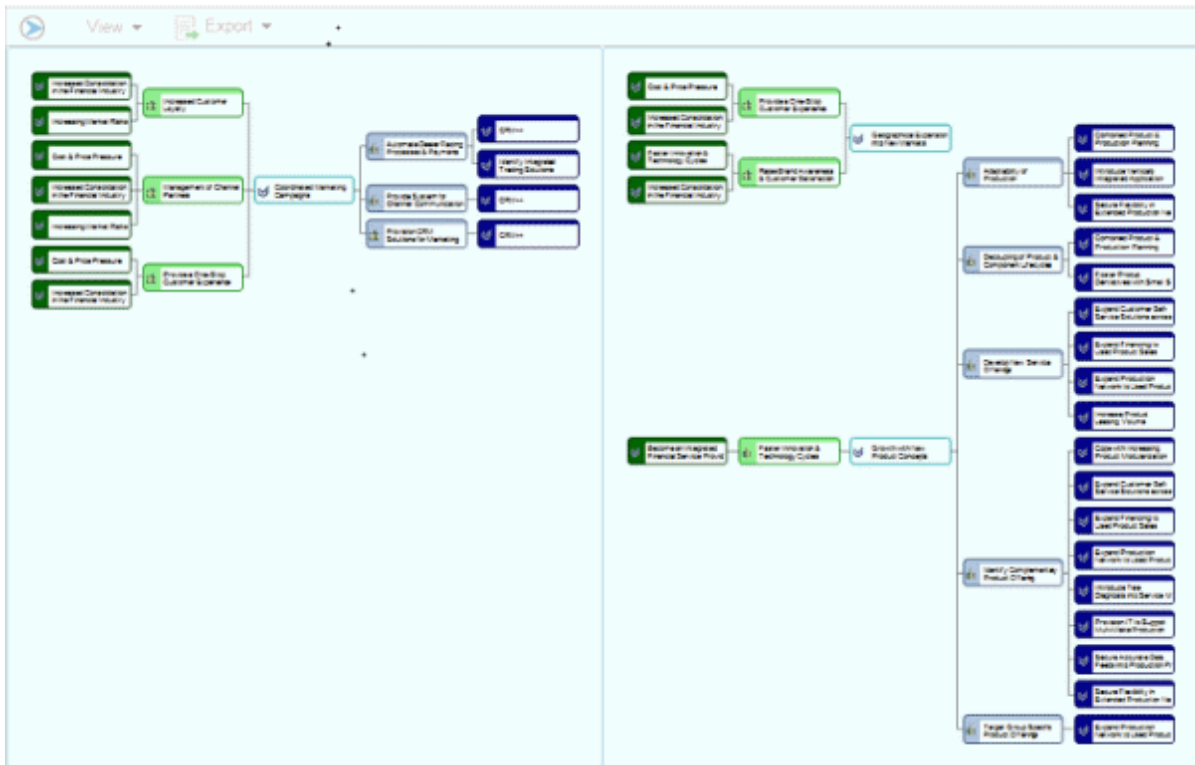


FIGURE: Grid report with two cells

In the image above, the first cell displays a relationship tree, the second cell displays relationships of three different base objects.

Depending on the configuration of your report, you may be able to navigate to an object profile by double-clicking an object. Please note that the double-click action is reserved only for navigation. If you double-click an object and nothing happens, then navigation is not possible for the object. A legend may also be available.

### Working with Cluster Map Reports

A cluster map report is a report configured by your solution designer. The report shows related Alfabet objects in multiple levels of nested boxes. The outermost boxes could be arranged vertically or horizontally. The boxes represent objects that are found by means of queries that define the object relationships. Each object in the report is represented by a colored box. The color and indicator symbols represent various dimensions of evaluation



FIGURE: Cluster map

For example, the cluster map displayed above shows sub-organizations, business processes executed by the organizations, and applications providing support for the business processes. The colors of objects in an object class may depend on the number of open assignments while the colors displayed for objects of another object class may represent the object's criticality for the business. Multiple cluster maps can be displayed in one cluster map report. Each cell in the cluster map report may be filled with another cluster map.

Depending on the configuration of your report, you may be able to navigate to an object profile by double-clicking an object. Please note that the double-click action is reserved only for navigation. If you double-click an object and nothing happens, then navigation is not possible for the object. A legend may also be available.

## Working with Affinity and Diagram Matrix Reports

Matrix reports shows object dependencies in a matrix. Columns and rows of the report represent Alfabet objects. The cells display objects that are related to both the object in the row header row and the object of the column header. Each object in the report is represented by a colored box, border color and an optional indicator icon. The color and indicator symbols represent various dimensions of evaluation

The Affinity Matrix features the following:

- Column and row headers that are fixed during scrolling. The column header is excluded from vertical scrolling and the row header is excluded from horizontal scrolling.
- All cells in the matrix are displayed with sharp edges and the color is plain fill.
- Indicators cannot be displayed for objects in the matrix.



FIGURE: Upper-left corner of an affinity matrix before scrolling

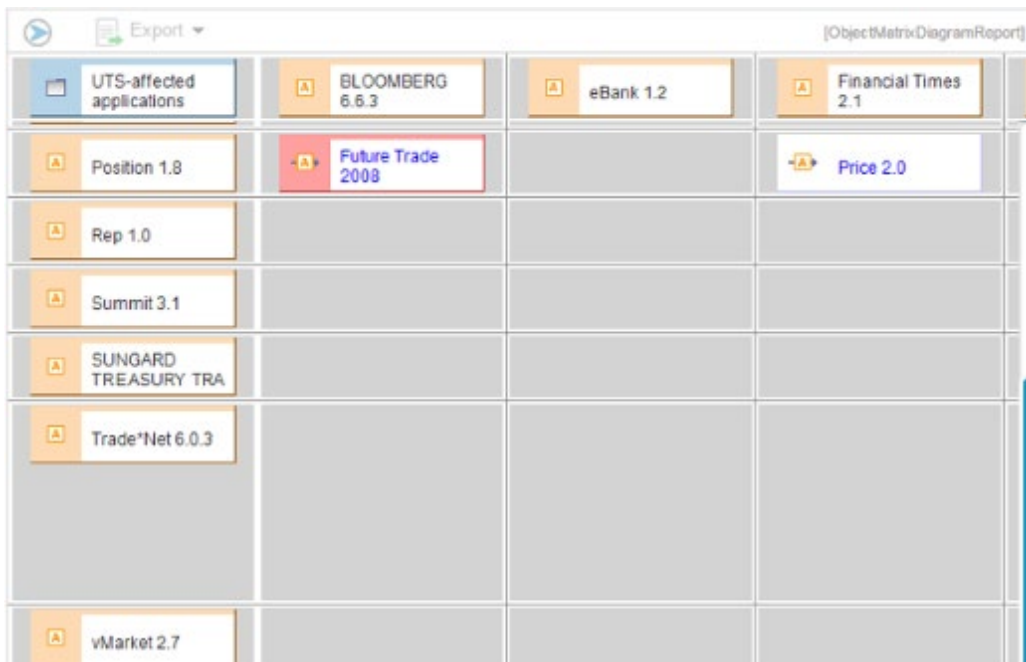


FIGURE: Upper-left corner of the affinity matrix above after vertical scrolling

The Diagram Matrix features the following:


- Column and row headers are included in scrolling and move out of sight when scrolling.
- All cells in the matrix are displayed either with rounded or sharp edges and with a color gradient.
- Indicators can be displayed for objects in the matrix.

Trading (UTS)	1.3.1 Asset Class Trading	1.3.2 Hedging
FD Trading	<p>Enable Internet-based Trading with</p> <p>Enhance Trade*Net</p> <p>Fix TradeNet security issues</p> <p>Implement Unified Trade Solution</p> <p>Migrate CRM Opti Retail to CRM CS</p> <p>Modernize Reporting Applications</p> <p>Reshape Core Trading Applications</p> <p>Upgrade GenLManager</p>	<p>Enable Internet-based Trading with</p> <p>Enhance Trade*Net</p> <p>Fix TradeNet security issues</p> <p>Implement Unified Trade Solution</p> <p>Migrate CRM Opti Retail to CRM CSS</p> <p>Modernize Reporting Applications</p> <p>Reshape Core Trading Applications</p> <p>Upgrade GenLManager</p>
OR Trading		<p>Enhance Trade*Net</p> <p>Implement Unified Trade Solution</p> <p>Reshape Core Trading Applications</p>
WP Investments	<p>Enhance Trade*Net</p> <p>Fortify SUNGARD</p>	<p>Enhance Trade*Net</p> <p>Fortify SUNGARD</p>

FIGURE: Diagram matrix with indicators displayed for some objects

## Working with Radar, Bar, Line and Pie Charts

Chart reports display the results of a query in either a radar chart, bar chart, pie chart or line chart. Only numerical values (for example, indicator values or the number of results in a report) can be displayed in chart reports. Configured radar, bar, pie, or line chart reports offer the following features:

- The color used for objects in the chart can be changed by the user if the **Colors**  button of the report is enabled or if a color selector is defined in a custom editor for the respective object class. Alternatively, the report can be configured to assign a fixed color to each graphic element in the result via a definition in the data set the report is based on.
- You can click the graphic representation of an object in the report to display a link below the image in order to navigate to the object profile or to a configured report.

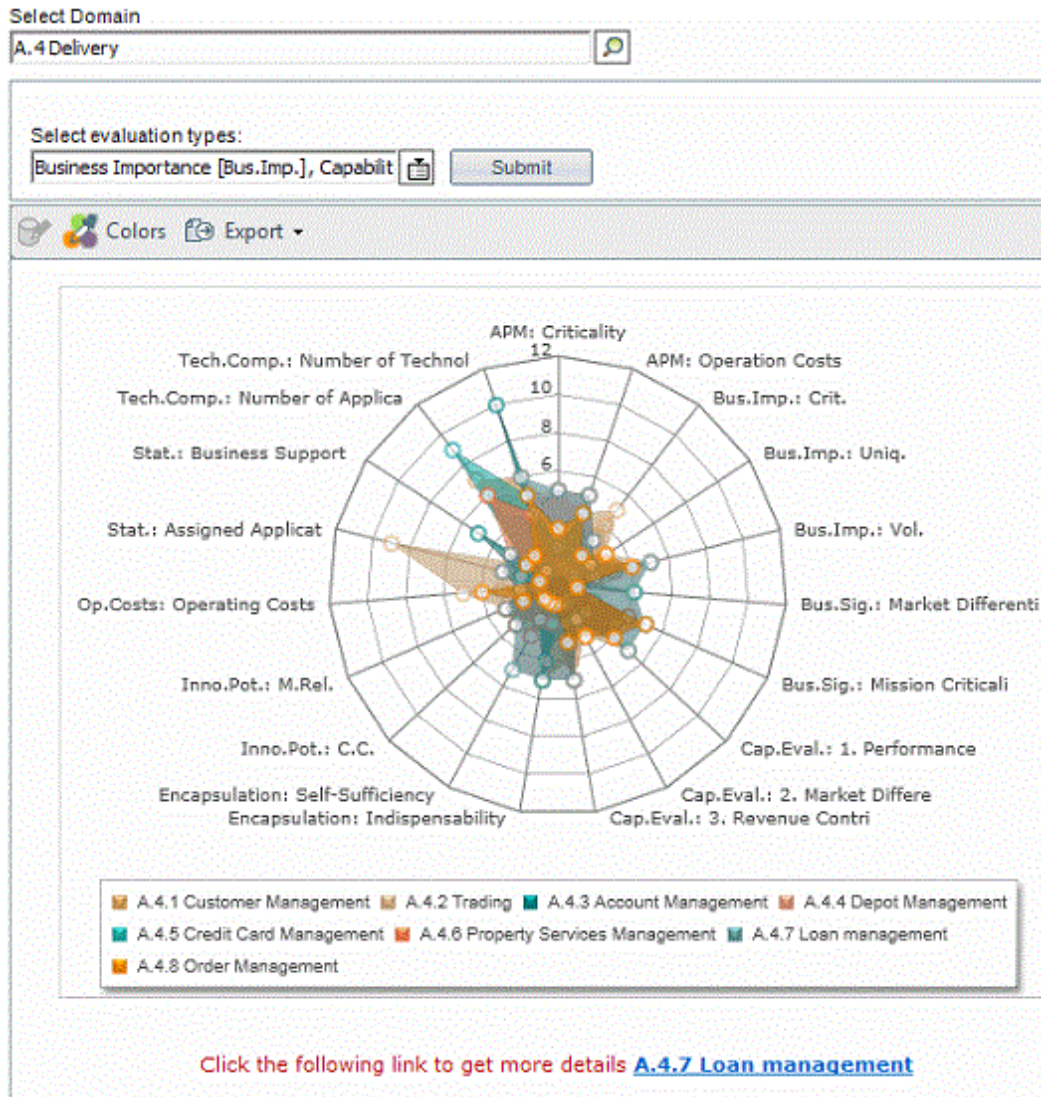


FIGURE: Radar chart displaying evaluations for sub-domains of a selected domain

In the radar chart, a link to the object is displayed when the bubble for an object on one of the axes is clicked.



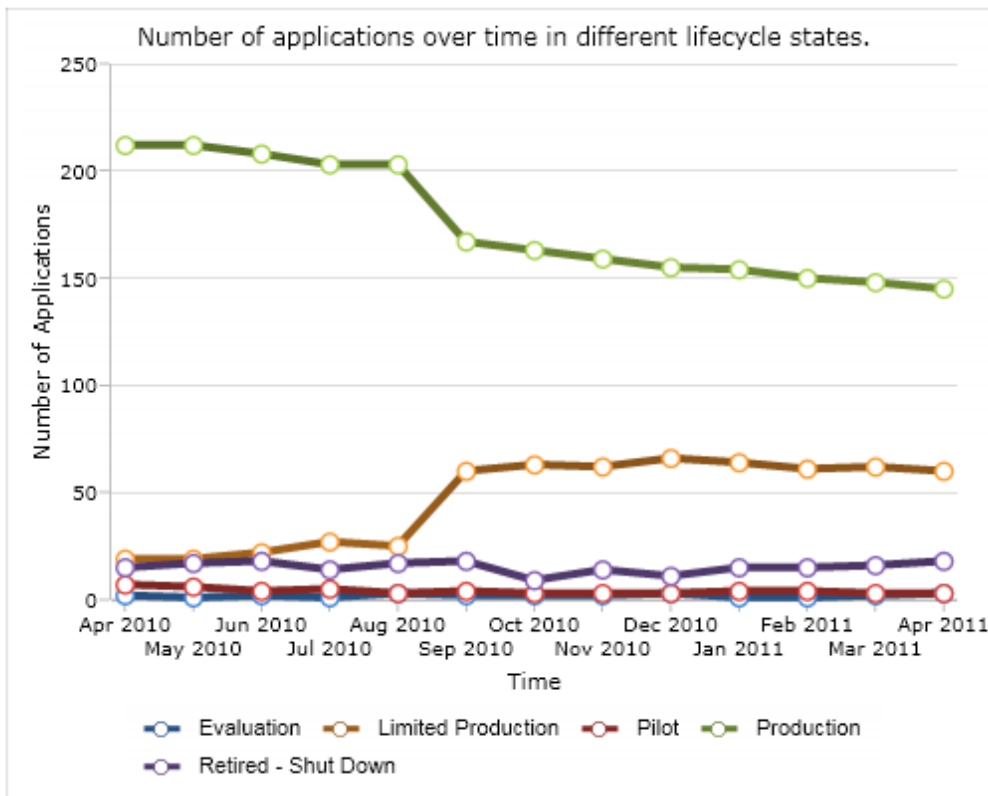


FIGURE: Line chart displaying the number of applications over time in different lifecycle states

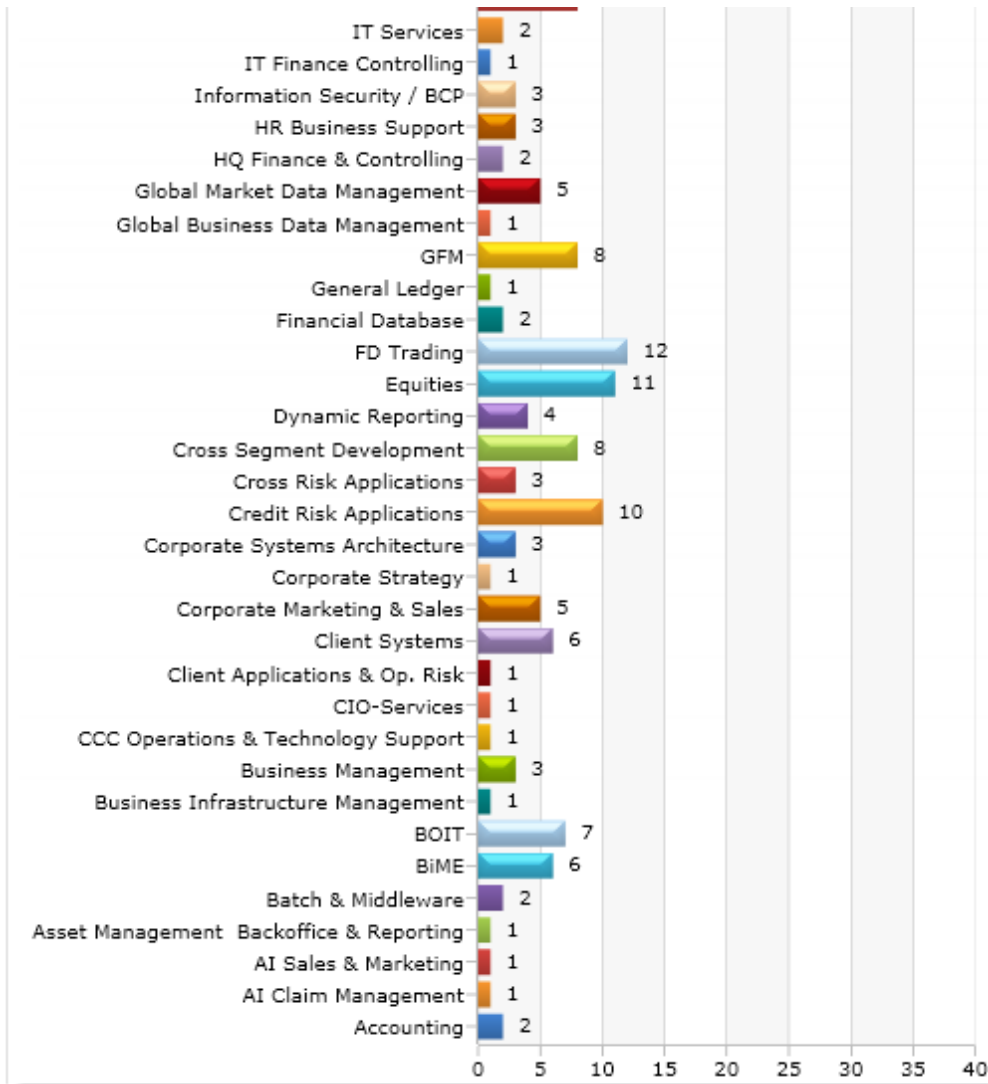


FIGURE: Bar chart in horizontal orientation displaying the number of ICT objects per organization

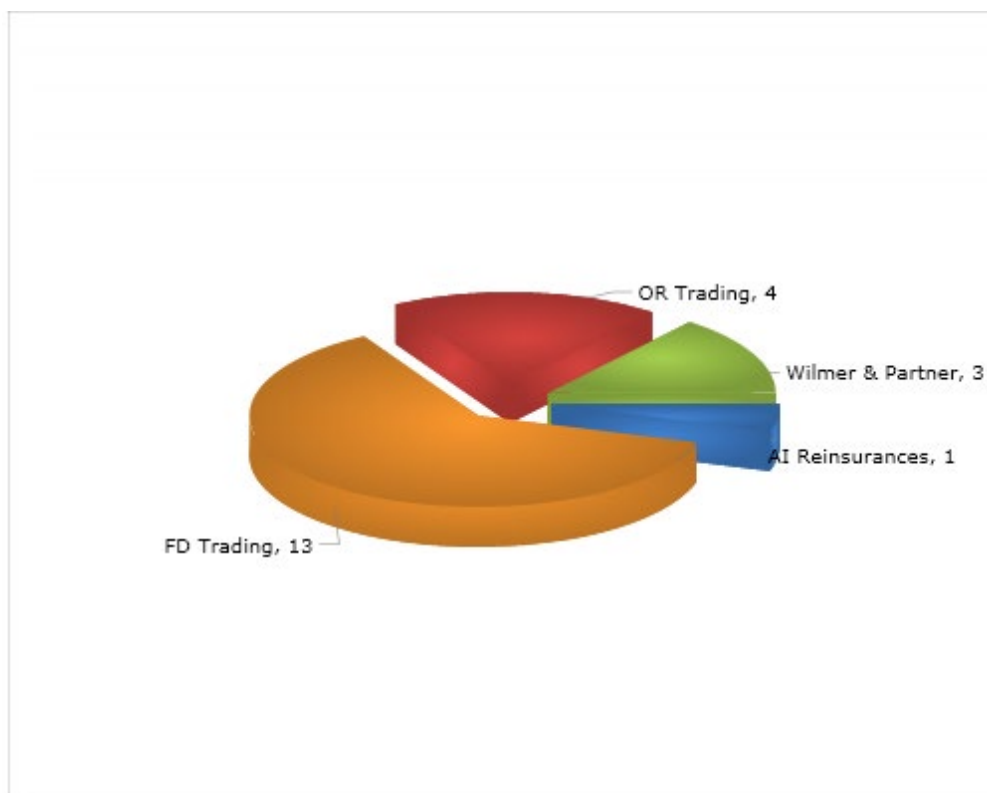


FIGURE: Pie chart displaying the number of business supports that an application provides

## Working with Treemap Reports

A treemap report is a report configured by your solution designer. The report shows Alfabet objects from the perspective of a specified object class. The report is structured in columns that represent an object class that is associated with the specified object class. For example, a report can show application groups in the column headers and the applications assigned to the respective application group as objects in the columns. Each object in the report is represented by a colored box. The color, size, and indicator symbols represent various dimensions of evaluation

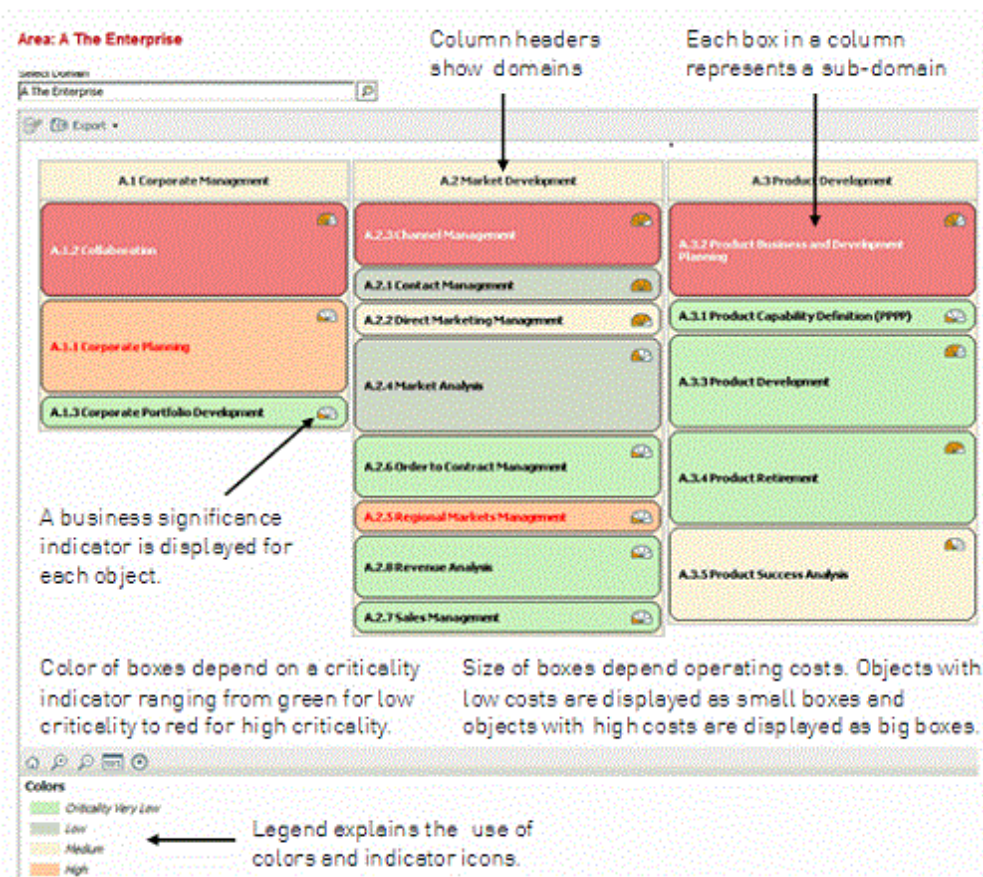


FIGURE: Example for treemap report displaying sub-domains sorted by parent domain.

In the example above, a domain with high criticality is displayed in red whereas a domain with low criticality is displayed in green. The size of the domain represents its operating costs. The lower the operating costs, the smaller the box representing the object in the report. The indicator displayed on the box highlights a third aspect that is critical to the evaluation of the domain. In this case, a risk assessment for the domain is visualized.

Depending on the configuration of your report, you may be able to navigate to an object profile by double-clicking an object. Please note that the double-click action is reserved only for navigation. If you double-click an object and nothing happens, then navigation is not possible for the object. A legend may also be available.

## Executing Your Configured Reports


The **Configured Reports** view allows you to view and execute the configured reports that you have access to. Depending on the configuration of the configured reports, the reports may be automatically available in the view or you may need to explicitly add the configured report to the view.

There are many different types of configured reports in Alfabet. For an overview of how to work with the different kinds of visualizations available in configured reports, see the section [Analyzing Your Data in Page Views and Reports](#) in the reference manual *Getting Started with Alfabet*. The following explains the values that may be displayed in the **Type** column of the view.

Report Type	Description
Query	<p>Configured report based on an Alfabet query. The output is a tabular report.</p> <p>Tabular reports display search results in a table. Depending on the configuration, search parameters can either be defined by the user or exclusively defined by the solution designer who configured the report.</p>
NativeSql	Configured report based on a native SQL query. The output is a tabular report.
Custom	Configured report displaying graphic representation of data based on Alfabet queries or native SQL queries. The Alfabet queries defining the content of the configured report are specified in a report assistant. Graphic reports include cluster maps, trees and tree maps, layered diagrams, data-capture matrices and charts.
ObjectView	Configured report displaying an object profile or object cockpit configured for objects in a selected object class.
Extern	<p>Configured report opening a URL. This type of report displays data in the Alfabet database or external data generated by third-party reporting tools. The report could display either a static website or dynamic content generated by means of a script or reporting tool that searches the Alfabet database via an SQL-based query.</p> <p>Optionally, an external report may be configured to provide ReadOnly access to views via hyperlinks. Depending on the configuration of the link syntax, access may be via a named user or an anonymous user, and the view may open with a different user profile than the one that was used for log in. For more information, see the section <i>Links to Alfabet Views from External Applications</i> in the reference manual <i>System Administration</i></p>

When you open the view, you will see a table listing all configured reports that have been configured by your report designer in the configuration tool Alfabet Expand. The configured reports are structured in sections in the table that correspond to the report folders created in Alfabet Expand. The name, structure, and number of sections will depend on your individual solution configuration. You can click a column header to sort the configured reports in alphanumeric order based on the value of the columns. When configured reports are structured in report folders, the configured reports are sorted within the folders and the folder structure is maintained.

If necessary, you can limit the objects in the table. To do so, enter search criteria in the **Search Pattern** field and click **Update**. The search pattern is used to match the name, caption or description of the configured reports or report folders. If a configured report or report folder matches the search criteria, the complete folder hierarchy of the configured report or report folder will be displayed. Objects not matching the search criteria but that are located in the same hierarchy are also displayed. If a report folder matches the search criteria, the configured reports and report folders subordinate to the report folder will also be displayed. To return to the view that displays all reports structured in report folders, you must clear the **Search Pattern** field and click **Update**.

The view displays all configured reports that you have access permissions. A configured report displayed in an orange row cannot be executed and the **Open Report**  button will not be available when the configured report is selected. Each column in the table is explained below:

- **Caption:** The caption of the configured report/report folder. The caption is displayed to the user in the **Configured Reports** view.
- **Description:** The description of the configured report/report folder provided by the creator of the configured report/report folder. The description is displayed to the user in the **Configured Reports** view.
- **Type :** Whether the configured report is based on a native SQL query (SQL), an Alfabet query (Query), graphic template (Custom), object profile/object cockpit (ObjectView), or URL (Extern).

The following information is available:

- [Adding a Configured Report to the View](#)
- [Opening a Configured Report](#)
- [Opening a Configured Report Executed Offline](#)

### Adding a Configured Report to the View

Some configured reports will not be automatically displayed when you open the **Configured Reports** view. These reports have been configured by your report designer in such a way that you must explicitly add them to the view.

To add a configured report:


- 1) In the **Configured Reports** view, click **New > Add Report** in the toolbar.
- 2) The object selector opens. Enter search criteria in the **Search Pattern** field, as needed. You can search via **Caption, Name, or Type**. Click **Search**.



Access permissions to reports are configured by your user administrator. For example, configured reports may be available or unavailable for specific users, user groups, or users logged in with a specific user profile. Therefore, you may not necessarily have the access permissions required to add a configured report that is displayed in the selector. If you try to add a configure report for that you do not have access permissions for, the report will not be added to the view and a message will be displayed.


- 3) Select the report(s) you want to add to your list of reports and click **OK** to save your changes.



You can remove a configured report from the view by clicking the **Delete**  button. The report will be removed from the table, but will remain in the Alfabet database and typically be added to the view at a later time.

## Opening a Configured Report



The content of a configured report will vary greatly depending on the configuration. Some reports are configured to show results whereas others have been configured to show results only the filter(s) have been defined. For an overview of how to work with the different kinds of visualizations available in configured reports, see the section [Analyzing Your Data in Page Views and Reports](#) in the reference manual *Getting Started with Alfabet*.

- 1) In the **Configured Reports** view, click the report that you want to open.
- 2) In the toolbar, click the **Open Report**  button.
- 3) Depending on the type of configured report you are working with, carry out one of the following steps to view the report:

- Define the filters displayed and click the button to display the results in the table.



Some reports might be configured to be executed offline. For reports executed online, you will not see the results immediately in the view but a window will open that allows you to define a name for the report result. The report result will be generated in the background and you will be informed as soon as the report results are available. For detailed information about the handling of reports executed executed, see [Opening a Configured Report Executed Offline](#) below.

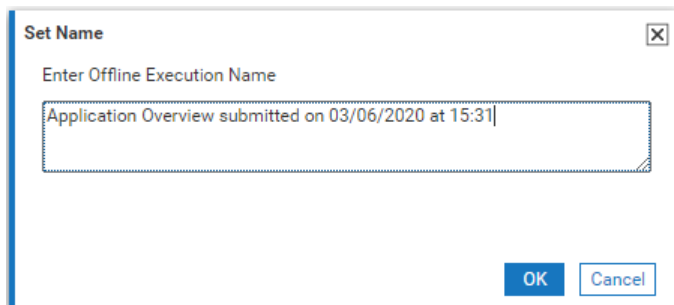
- Select an object in the table and click the **Navigate**  button to open the object profile of the object that is the base object of the configured report.
- If the **Chart Views**  button is available, you may be able to select any of the standard formats to display data:
  - Lifecycle Chart
  - Portfolio Chart
  - Business Support Map Report
  - Information Flow Diagram
  - Project Tracking Overview (for reports with the base class Project)
- If the configured report is of the report type `Extern`, you can directly view the specified URL in a web browser. Additional actions may have been configured in the external application in order to see the report results. If hyperlinks to Alfabet objects are displayed in the report, you can access the Alfabet view by clicking the hyperlink. However, your solution configuration may require that you access the Alfabet view using a different user profile than the one you are currently logged in with.

## Opening a Configured Report Executed Offline

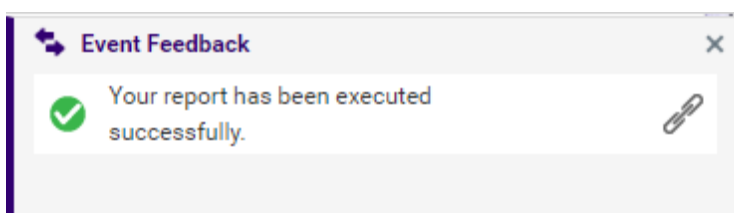
If execution of a configured tabular report with filters takes a long time, the report designer can configure the report to be executed offline. Instead of waiting for the report to load, you can then work on other views in the Alfabet user interface while the configured report is being executed in the background.



After the report that has been executed offline has been opened:

- 1) Set the filters of the configured report and click the button to execute the filter.
- 2) In the pop-up window that opens, define a name for the report result with the current filter settings:



- 3) Click **OK** to execute the report. You can now change to other views. Please note that the **Event Feedback** window informing about the availability of report results will only be displayed when the view is changed or re-loaded.
- 4) After successful execution of the configured report, you will see an **Event Feedback** window displaying a text provided by the report designer for the report with a link  symbol.




Move the cursor over the link  symbol to show a tooltip displaying the name you defined for the execution of the report. Click the link  symbol to open the report results in a new browser tab. Filters are displayed only in the report results.



If you have set a size restriction for text in table cells with the **Max. Dataset Cell Text Length** attribute in the **User Settings** editor, the text in the event feedback window may be truncated. To view the full text in a tooltip window, move the cursor over the text.

The **Event Feedback** window will open for a few seconds and then drop into the slide-in toolbar where it will be available as long as you are working with the same view. To open the report results after changing to another view:

- Click the **My Last Event Feedback** notch in the slide-in toolbar to view a list of all event feedback available in the last 24 hours including your current report results. Open the configured report via the link  symbol.
- Open the configured report and click the button (if available) to update the report results without changing the filter settings. A window will open that provides information about the availability of report results. Click **Yes** to open a link list of available report results. Click an execution result name in the link list to open the execution result in a new browser tab.



## Printing a View in Alfabet


You can print most views in Alfabet including tables, diagrams, matrices, and business graphics. Object profiles and object cockpits can be printed, but they must first be published as a DOC or PDF file. A printing capability is not available for non-analytical views such as the bookmark desktop, world map, explorers, and selectors. The printing capability leverages the printing function of the standard browser installed on the user machine.

The following information is available:

- [Printing Data in a Table](#)
- [Printing a Business Graphic, Diagram, or Matrix](#)
- [Printing an Object Profile/Object Cockpit via the Publish Capability](#)


### Printing Data in a Table

You can print the data displayed in a table using the browser print functionality.

- 1) Navigate to the view that you want to print.
- 2) Click a row in the table display the floating toolbar in the bottom right corner and click the **Print**  button.
- 3) Confirm the information message by clicking **OK**. A separate browser tab will open displaying the view to be printed.
- 4) Use your browser's printing capability to print the view.

### Printing a Business Graphic, Diagram, or Matrix

To print a business graphic, diagram, or matrix, you first need to set up the page to be printed. You must define the paper format, page orientation, scaling factor, and the page margins. Based on these specifications, the data in the view may be sliced with invisible page breaks into individual pages. The layout of the data will be based on the formatting specifications and will be displayed in a new browser window. You can then print the view using your browser's print functionality. The **Print** button will not be displayed for views with business graphics that are not printable such branching diagram reports, circular roadmap reports map charts, and gauge reports.

- 1) Click the **Print**  button in the floating toolbar to open the **Prepare Print Page** dialog. Define the page setup in order to provide specifications about the layout. If the view is large, the data will be distributed across pages. Page breaks will be created based on the page setup values. Define the following settings, as needed.
  - **Print Format:** Select the paper size that you will be printing to. You should select a print format to match the paper size you are printing to, otherwise the view may be sliced with page breaks.
  - **Orientation:** Select the orientation of the data on the page.
  - **Scaling (%):** Define the print scaling in percentage in order to resize the diagram.

- **Resolution (DPI):** Define the resolution in dots per inch.
- **Left Margin (mm):** Define the left margin in millimeter.



The unit of measurement will depend on the cultures implemented in your Alfabet solution. For more information about the configuration of cultures, see the section *Specifying the Cultures Relevant to Your Enterprise* in the chapter *Localization and Multi-Language Support for the Alfabet Interface* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- **Right Margin (mm):** Define the right margin in millimeter.
  - **Bottom Margin (mm):** Define the bottom margin in millimeter.
  - **Top Margin (mm):** Define the top margin in millimeter.
  - **Add Filter Summary:** Select the checkbox if the filter settings defined for the view should be included in the printout.
- 2) Click **OK** to apply the page setup options. A separate browser tab will open displaying the view to be printed.
  - 3) Preview the layout of the data in the browser's print functionality. If the layout of the view is not satisfactory, close the browser tab and readjust the page setup in **Prepare Print Page** editor in Alfabet. If part of the visualization is cut off, for example, you might change the orientation or scaling in the **Prepare Print Page** editor. Repeat this procedure until you are satisfied with the layout of the view.
  - 4) Print the view in the browser and close the browser tab by clicking X.

## Printing an Object Profile/Object Cockpit via the Publish Capability



The browser print functionality does not recognize multiple scroll bars in a view. Therefore, only one page will be printed if you use the browser print functionality to print an object cockpit.

Object profiles and object cockpits must first be published as a DOC or PDF file via the **Publish** capability and then printed using the browser print functionality. Please note the following regarding the publication of object cockpits:

- In the **Object Document** editor, you can select which group boxes and page views to include in the DOC or PDF file as well as the orientation of the each group box and view. During the publication process, group boxes are converted to tables, thus providing a structured visualization of the data in the DOC and PDF file.
- You can specify whether large blocks of data such as diagrams and matrices should be published on a separate page in the DOC or PDF file.
- The sequence of the object cockpit's content displayed in the DOC or PDF file is configured in the configuration tool Alfabet Expand.

For more information about using the **Publish** capability, see the section [Publishing an Object Profile/Object Cockpit as a DOC or PDF File](#). For more information about the configuration of an object cockpit, see the section *Configuring Object Cockpits for a Custom Object View* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Exporting Data

A number of standard mechanisms are available in Alfabet in order to export data from the Alfabet database. Once a file has been exported, you may download it to your local network environment via the right-click interactions available in Microsoft Internet Explorer. Please note that the file name is automatically generated but can be changed as needed.



The third-party component Essential Objects® can be used to enhance the image quality for images exported to Microsoft Word®, Microsoft PowerPoint® or PDF files as well as the export of business charts such as line, area, or pie charts. Please note that the component is not automatically used for image export and requires your system administrator to activate the `web.config` file of the Alfabet Web Application. For more information, see the section *Setting Up the Alfabet Web Application* in the reference manual *System Administration*.

The following standard capabilities exist in order to export and publish Alfabet data:

- [Publishing an Object Profile/Object Cockpit as a DOC or PDF File](#)
- [Exporting and Saving Data in a Table as XLS or XLSX](#)
- [Exporting an Object Cockpit or Page View as a DOC or PDF File](#)
- [Exporting and Saving Data as HTML](#)
- [Exporting Views with Graphics as HTML+ PNG, EMF, JPEG, or BMP, or as SVG](#)
- [Exporting Datasets, Diagrams, Matrix Reports, and Gantt Charts as PPT](#)

### Publishing an Object Profile/Object Cockpit as a DOC or PDF File

You can publish data displayed in an object profile or object cockpit to either a DOC or PDF file. In the case of an object profile, you can specify the attribute information as well as which page views should be included in the publication. In this way, you can choose to publish all of the data or only a specified set of the data displayed in the object profile or object cockpit. For object cockpits, all data displayed in the cockpit will be published. The content of the view will be automatically adjusted to the page width. In most cases, the content of the view is squeezed to fit the view, but in some exceptional cases, the content may be stretched to fit the view. Please note that the order of the content of the object cockpit is determined by the configuration of the object cockpit.

If you are publishing an object profile, a legend available for a page view will be included in the publication. This is not the case for object cockpits. If you publish an object cockpit, legends will not be included. If the legend is required, you should export the page view separately.

Please note that you can specify the layout of the information in the DOC or PDF file. Once the object profile or object cockpit has been exported, you can further process the DOC or PDF file, as needed. You must have Adobe Reader®/ Adobe Acrobat® or Microsoft Word installed on your client machine in order to view and process the respective PDF or DOC file. You can print the file using your browser's print capability.



To export an object cockpit as a single PDF page, select the **Export > Adobe PDF** option. For more information, see the section [Exporting an Object Cockpit or Page View as a DOC or PDF File](#).

This functionality is available to all users with Read permissions for an object profile if the **Publish** button is displayed. Whether the **Publish** button is displayed in an object profile or object cockpit will depend on the configuration of the user profile in your Alfabet solution. Object profiles and object cockpits must first be published as a DOC or PDF file via the **Publish** capability and then printed using the browser print functionality.



Please note the following regarding the publication capability:

- Exported Alfabet data that is processed in a DOC file cannot be reimported to Alfabet !
- Asian characters cannot be published to a PDF or DOC file via the **Publish** button.
- Please note that configured gauge reports and geo-map reports that are embedded in an object cockpit cannot be exported to the DOC or PDF file.



Please note that the configured row span and column span is ignored for a page view displaying a diagram when the object cockpit is published to a DOC or PDF file. In this case, the size of the diagram will be decreased in the publication.



To enhance image quality of business graphics included in the publication, the embedded third-party component Essential Objects® can be activated. For more information, see *Prerequisites for Using Essential Objects®* in the reference manual *Technical Requirements*.

To publish object profile or object cockpit data to a DOC or PDF file:

- 1) In the toolbar of the object profile or object cockpit, click the **Publish** button. The **Object Document** editor opens.
- 2) Define the following information, as needed:



The settings that you define in the **Object Document** editor will be persistent for the object class that you are publishing. If you log in with a different user profile or publish the object profile/object cockpit for a different object class, you will need to redefine the settings.

**Data** tab: In the **Show in Document** column, select all attributes, group boxes and page views that you want published in the report. In the **View Orientation** cell, define the orientation of the information displayed in the **Attributes** section. Please note the following:

- The sequence of the object cockpit's content displayed in the DOC or PDF file is configured in the configuration tool Alfabet Expand.
- During the publication process, group boxes will be converted to tables, thus providing a structured visualization of the data in the DOC and PDF file. Scroll down to define the orientation of the page views displayed in the object profile/object cockpit.
- Please note that you can improve the readability of large blocks of data such as diagrams and matrices by setting the **View Orientation** cell to **Landscape**, or by specifying that the view be published on a separate page in the DOC or PDF file ( **Portrait Separate Page** or **Landscape Separate Page** ).
- Use the **Select All** and **Clear All** buttons to set or clear the checkmark for all attributes and page views, if needed.

**Layout tab:**

- **Document Title:** Enter a title for the document. The title appears on the first page of the document.
- **Document Type:** Select DOC or PDF to define the publication format.
- **Default Page Orientation:** Select the page orientation for the publication. All publication pages will be accordingly formatted except for those differently defined in the **View Orientation** column in the **Data** tab.
- **Page Size:** Select the page size for the publication.

**Standard Text** section: These settings determine the text for the data in the published page views.

- **Font Type:** Select the font type for the text for the data in the selected views.
- **Font Size:** Select the font size for the text for the data in the selected views.
- **Paragraph Spacing (px):** Define the spacing in pixel between the end of the page view and the title of the following page view.

**Page View Names** section: These settings determine the text representing the title of the document and page views.

- **Font Type:** Select the font type for the text representing the title of the document and page views.
- **Font Size:** Select the font size for the text representing the title of the document and page views.

**Page View Descriptions** section: These settings determine the text representing the page view descriptions displayed in the Alfabet interface that briefly explain the content of the page view.

- **Font Type:** Select the font type for the text representing the page view descriptions.
- **Font Size:** Select the font size for the text representing the page view descriptions.
- **Include Descriptions:** Select the checkbox if the page view descriptions explaining the content of the page views should be included in the report. The page view descriptions will be displayed in the publication below the name of the page view.

**Page Footer Information** section: These settings determine the information that is displayed in the footer of the exported document.

- **Font Type:** Select the font type for the text in the document footer.
- **Font Size:** Select the font size for the text in the document footer.
- **Include Attribute Captions:** Select the checkbox if the captions for the footer attributes should be included in the document footer. Do not select the checkbox if only the values for the footer attributes should be included in the document footer.
- **Include Timestamp:** Select the checkbox if the date and time that the publication was generated should be included in the document footer.
- **Include Object Image Property:** Select the checkbox to display the configured image properties of the object for which the publication is created in the document footer.

The image properties are typically configured to display the ID, name, and version of the object.

- **Include Alias Name:** Select the checkbox if the name of the server alias used to connect to Alfabet should be included in the document footer.
  - **Include User Name:** Select the checkbox if the name of the user creating the publication should be included in the document footer.
- 3) Click **OK** to save your changes and initiate the publication of the selected data. A standard **Save As** dialog box opens
  - 4) Enter a name and location for the file and click **OK**. You can open the DOC file with Microsoft Word or the PDF file with Adobe Reader® or Adobe Acrobat®.

## Exporting and Saving Data in a Table as XLS or XLSX

You can export and save data displayed in a table in a view to an XLS or XLSX file. A flat list of data as well as data in expandable tables can be exported. The Name and ID of the object view and caption of the page view will also be exported to the XLS file.

When exporting to Microsoft Excel, the user can select the file extension XLSX and thus export a dataset with a size of up to 1M. If the user selects the default file extension XLS, a limit of 64k records will apply. You must have Microsoft Excel 2000 or later installed on your machine in order to view and process the XLS file. You must have Microsoft Excel 2007 or later installed on your machine in order to view and process the XLSX file.



- Exported Alfabet data that is processed in an XLS or XLSX file cannot be reimported to Alfabet !
- The final output that is exported will closely correspond to what you see on the screen. Therefore, if an object is selected in the table upon export, for example, the row will be highlighted grey in the exported file.
- Boolean values exported to the report will be represented by an X for `True` and an empty cell for `False`. This is consistent with the display of `True/False` values in Alfabet.
- If the content of a cell in the dataset begins with a protocol specification starting with `http`, `https`, `ftp`, etc., the syntax of the link will be validated during the export. If the syntax of the link is valid, it will be displayed as a link in the XLS file. If the syntax is not valid, the string will be published as text. Please note that a colon (for example: `ABS:Test 1`) is valid URL syntax and would thus be displayed as a link.

To export a Alfabet view to an XLS or XLSX file that you can process, as needed.

- 1) Click **Export > Include Filter Summary** if filter settings are defined and you want to include a summary of the filter settings in the export file. A checkmark will be displayed if the option is selected. The legend will be exported to a separate tab labeled `Filter Summary`. Clear the checkbox if you do not want the filter summary included in the export.



Please note the following:

- If no **Include Filter Summary** option is available for the view, filter settings will not be included in the export.
  - The option **Include Filter Summary** may be available in the **Export** menu in views and configured reports even if filter settings are not available in the view.
  - The default setting for the **Include Filter Summary** option is defined in the **User Settings** editor. For more information about defining your default user settings, see the section [Defining Your User Settings in Alfabet](#).
- 2) In the **Export** menu, select **Excel File** to export the page view to an XLS file.
  - 3) A standard **Save As** dialog box opens.
  - 4) Enter a name and location for the file, select the file extension, and click **OK**. You can open the file with Microsoft Excel.

## Exporting an Object Cockpit or Page View as a DOC or PDF File

Export to DOC or PDF is supported for datasets as well as views with images including, for example, diagrams, Gantt charts, portfolios, matrices, circular roadmaps, branching diagrams, and gallery diagrams. The visualizations will be exported in their actual size. If a graph is bigger than a single page, the graph will be automatically split across multiple pages upon export. Headers will be repeated when splitting if applicable. You must have a relevant program installed on your computer/device to open the DOC or PDF file. The caption and description of an exported page view or configured report will be included in the PDF file that the data is exported to.

If you export an object cockpit, console report, or dashboard, it will be exported to a single PDF page. Configured reports published to a PDF file will be scaled to the paper size selected by the user, thus overriding the size configured for the report.


To export the view to a PDF file that you can share with others:

- 1) If exporting a tabular dataset, ensure that all sections of the page view are expanded that you want to have visible in the PDF file.
- 2) Click **Export > Include Filter Summary** if filter settings are defined and you want to include a summary of the filter settings in the export file. A checkmark will be displayed if the option is selected. Clear the checkbox if you do not want the filter summary included in the export.



Please note the following:

- If no **Include Filter Summary** option is available for the view, filter settings will not be included in the export.
  - The option **Include Filter Summary** may be available in the **Export** menu in views and configured reports even if filter settings are not available in the view.
  - The default setting for the **Include Filter Summary** option is defined in the **User Settings** editor. For more information about defining your default user settings, see the section [Defining Your User Settings in Alfabet](#).
- 3) In the toolbar of the view, click **Export > Adobe PDF** or **Export > Microsoft Word**. In the **Export Page Setup** editor that opens, define the following:

- **Page Setup** tab:
    - **Page Size:** Select the page size for the export.
      -  The options in the **Page Size** field are configured by your solution designer in the XML object **ExportDocumentPageSizeManager**. For more information, see the section *Specifying the Page Sizes Available to Export DOC and PDF Files* in the reference manual *Configuring Alfabet with Alfabet Expand*.
    - **Page Orientation:** Select the page orientation for the export.
    - **Measurement Units:** Select which type of measurement unit will be applied to the margin definitions.
    - **Top Margin:** Specify the distance of the top margin.
    - **Bottom Margin:** Specify the distance of the bottom margin.
    - **Right Margin:** Specify the distance of the right margin.
    - **Left Margin:** Specify the distance of the left margin.
  - **Header/Footer Settings** tab: Specify the information to display in the header and footer of the exported file. You can display the caption of the currently selected object and view, timestamp of the export, the user name of the person exporting the data, and the name of the server alias that Alfabet is running on in either the header or footer.
    - **Header Text:** Select one or more pieces of information listed below that shall be included in the header of the DOC or PDF file.
    - **Footer Text:** Select one or more pieces of information listed below that shall be included in the footer of the DOC or PDF file.
    - **Font Color:** Specify the font color of the header and footer texts. The default font color is the color specified in the GUI scheme settings specified for your user profile.
    - **Font Size:** Specify the font size of the header and footer texts. The default size is 10.
- 4) Click **OK** to save the page setup.
- 5) In the dialog that opens, click the **Download** button and save the file. You can open the DOC or PDF file with a relevant program installed on your computer/device.

## Exporting and Saving Data as HTML

You can export and save data in a table in a view to an HTML file. Configured reports created by your enterprise cannot be exported to HTML.



Please note if images or icons are displayed, they must be exported to a ZIP file. For more information, see the section [Exporting Views with Graphics as HTML+ PNG, EMF, JPEG, or BMP, or as SVG](#).

To export as view to an HTML file that you can share with others:



- 1) If exporting a tabular dataset, ensure that all sections of the page view are expanded that you want to have visible in the HTML file.
- 2) In the toolbar of the view, click **Export > HTML File**. A standard **Save As** dialog box opens.
- 3) Enter a name and location for the file and click **OK**. You can open the HTML file in a standard browser.

## Exporting Views with Graphics as HTML+ PNG, EMF, JPEG, or BMP, or as SVG

In the case of business graphics, the business graphic can be saved as either a PNG, EMF, JPEG, or BMP file. The diagram will be exported as a graphic in the selected format together with an HTML file. The HTML file displays a headline giving the name of the exported diagram and the diagram image. The graphic and the HTML file will be saved to a ZIP file. To open the ZIP file, you will need an extracting tool like WinZip® on your client machine. The HTML file requires the graphic file to be located in the same directory.



Please note the following:

- Some business graphics - in particular diagrams - may be exported to an SVG file. The option **ZIP (HTML + SVG)** will be displayed in the **Export** menu if it is possible to export the business graphic to an SVG file. Please note however that bitmap elements in diagrams cannot be exported to an SVG file. Furthermore, the export of a diagram to an SVG file may display content outside of the diagram item if it was removed in the originally displayed diagram. To address this, please ensure that the diagram item size selected sufficiently displays the entire content. This is especially important if diagram views are displayed in the diagram.
- The size of the objects in business graphics differ in the user interface and in an export. This is due to the fact that two different libraries are currently required to render and to print/publish business graphics.
- The style sheet for export is configured in the configuration tool Alfabet Expand. For more information, see the sections *Configuring the Style Sheet for the Export to HTML* and *Configuring Header and Footer Text for Exported HTML Files* in the reference manual *Configuring Alfabet with Alfabet Expand*.



Depending on the specifications of the server hardware and operating system that Alfabet runs on, the size of business support maps may be limited. This is due to a limitation on bit maps that can be rendered on the server. In this case, large datasets may not export correctly.

Once a file has been exported, you may download it to your local network environment via the right-click interactions available in Microsoft Internet Explorer. If you are working with an Alfabet Web Client, the file available for downloading will be available for at least 10 minutes. If another export is executed, the file will be deleted after the 10 minute period. If no other export is initiated, the file will be deleted when your current Alfabet session ends.

To export a Alfabet view to an HTML file that you can share with others:

- 1) Click **Export > Include Filter Summary** if filter settings are defined and you want to include a summary of the filter settings in the export file. A checkmark will be displayed if the option is selected. The legend will be exported to a separate HTML file with the suffix `_Summary.html`

contained in the ZIP file. Clear the checkbox if you do not want the filter summary included in the export.



Please note the following:

- If no **Include Filter Summary** option is available for the view, filter settings will not be included in the export.
  - The option **Include Filter Summary** may be available in the **Export** menu in views and configured reports even if filter settings are not available in the view.
  - The default setting for the **Include Filter Summary** option is defined in the **User Settings** editor. For more information about defining your default user settings, see the section [Defining Your User Settings in Alfabet](#).
- 2) Click **Export > ZIP (HTML + <Graphic Format > )** to select the appropriate format to save your file. Please note that business graphics exported to the EMF format can only be displayed in Microsoft Internet Explorer. The EMF format is not standard and the display of colors may differ from other export formats.
  - 3) A standard **Save As** dialog box opens. Enter a name and location for the file and click **OK**. You can open the ZIP file by means of an extracting tool.s

## Exporting Datasets, Diagrams, Matrix Reports, and Gantt Charts as PPT

You can export datasets, diagrams, matrix reports, and Gantt charts directly to a Microsoft® PowerPoint® format. This functionality is supported for visualizations such as diagrams, business support maps, tree maps, cluster maps, grid reports, node arc reports, branch reports and lane reports. This allows you to easily integrate the data in presentations for your enterprise. You must have Microsoft PowerPoint installed on your machine in order to view and process the PPT file.

The PPT file will include the caption of the view in a title placeholder as well as the description in a sub-title placeholder. Please note that space for descriptions of views or configured reports in the sub-title placeholder is limited to one line. If the descriptions are longer, the entire text may not be visible. You can include a summary of the filter settings in the export, which will be exported to a separate slide. The legend will also be exported to a separate slide in the PPT file.

The export of data to Microsoft® PowerPoint® ensures that visualizations are exported in their actual size by scaling on the natural definition of a report. If a graph is bigger than a single slide, the graph will be automatically split across multiple slides upon export. Arrows will be added to the margins of the slides to provide help with understanding the layout of the slide content as well as during presentation navigation.

For an excessively large view such as a matrix or diagram, the view will first be split horizontally across multiple pages and then vertically. The default slicing between pages will attempt to avoid cutting through objects in the visualization. Arrows will be added to the margins of the page to indicate that a page continues either vertically or horizontally and to directly link to the subsequent page in either horizontal or vertical direction. Please note that the export of data in a dataset or matrix to a PPT file is limited to 1000 cells in order to prevent performance issues from occurring when an excessively large amount of data is exported.

Export of views with header information such as datasets, Gantt charts, and matrix map reports will repeat the header on each slide. In order to improve readability of exported business graphics



Users should specify their preferences for exporting Alfabet views to Microsoft® PowerPoint® in the **MS PowerPoint Export Format** field in the **User Settings** editor. The options **Wide-screen x 4**, **Widescreen 16:9** and **Standard 4:3** are available. The selected option corresponds to the slide size in the generated PowerPoint. For more information, see the section [Defining Your User Settings in Alfabet](#).



A **Page Split Settings** option has been added to the **Other Actions** menu in the Alfabet Diagram Designer and allows the expected page format for printing or for exporting to PPTX export to be specified. The lines where the diagram is split can be added to the output via the **View Page Split** attribute in order to make excessively large diagrams easier to understand in their printed/exported format. For more information, see the section *Specifying Settings to Export or Print the Diagram to PPT Format* in the *Designing IT Landscape Diagrams in Alfabet*.



To enhance image quality in the export and enable export for configured reports such as branching diagram reports or gallery reports, the embedded third-party component Essential Objects® can be activated. For more information, see *Prerequisites for Using Essential Objects®* in the reference manual *Technical Requirements*.



Depending on the specifications of the server hardware and operating system that Alfabet runs on, the size of business support maps may be limited. This is due to a limitation on bit maps that can be rendered on the server. In this case, large datasets may not export correctly.

- 1) Click **Export > Include Filter Summary** if filter settings are defined and you want to include a summary of the filter settings in the export file. A checkmark will be displayed if the option is selected. The legend will be exported to a separate HTML file with the suffix `_Summary.html` contained in the ZIP file. Clear the checkbox if you do not want the filter summary included in the export.



Please note the following:

- If no **Include Filter Summary** option is available for the view, filter settings will not be included in the export.
- The option **Include Filter Summary** may be available in the **Export** menu in views and configured reports even if filter settings are not available in the view.
- The default setting for the **Include Filter Summary** option is defined in the **User Settings** editor. For more information about defining your default user settings, see the section [Defining Your User Settings in Alfabet](#).

- 2) Click **Export > MS PowerPoint file (\*.ppt) as picture** to export the graphic to a PPT file. The diagram will be exported to a Microsoft PowerPoint file. The graphic will be included as an imported picture.
- 3) A standard **Save As** dialog box opens. Enter a name and location for the file and click **OK**.

## Using the Clipboard Capability

The clipboard capability is a convenient means to copy multiple objects and save them to the clipboard in order to easily define them as reference objects later in the user session. The objects will be saved to the **Clipboard** section of the dataset displayed in the **My Objects** tab in the relevant class selector. Data can be

saved to the clipboard even if the user has read-only access to a standard page view or configured report. The class selector can be opened in another view and the clipboard objects can then be selected in the **My Objects** tab and added as references to another object. The clipboard objects will remain in the **My Objects** tab of the class selector for the current user session.



For more information about the configuration of custom selectors, see *Configuring a Custom Selector for Search Functionalities*

The **Add to Clipboard** button is available in the following:

- Standard selectors and relevant custom selectors
- Standard views and relevant configured reports where the data is displayed in a tabular dataset.
- The toolbar of the following object profiles (unless the **Add to Clipboard** button has been explicitly hidden by your solution designer: **Application, Component, Demand, Device, ICT Object, Peripheral, Project, Organization, Standard Platform, Service Product, Technology, Vendor,** and **Vendor Product**.
- A standard page view or configured report that is embedded in an object cockpit. In this case, the clipboard functionality can be used in the context of the object cockpit without explicitly opening the embedded view/report.

To use the clipboard functionality:

- 1) Select the object(s) in the selector or dataset that you want to save to the clipboard. You can select several objects at once by holding down the CTRL key while selecting the objects
- 2) In the toolbar, click the **Add to Clipboard** button. If you are saving the objects in a selector, they will be immediately displayed in the **My Objects** tab.
- 3) Go to the relevant view where the objects shall be added and invoke the relevant functionality to open the selector to add the objects. Go to the **My Objects** tab in the selector, click the object(s) to add and click **OK**. The selected objects will remain in the clipboard for the current user session and can be added to other views where the selector for the relevant object class is invoked. [Using the Clipboard Capability](#) in the reference manual *Getting Started with Alfabet*.



Please note the following about the clipboard functionality:

- Data added to the clipboard will remain in the clipboard during the running sub-session. If the user opens another browser tab to open Alfabet or if the user logs out, the data will be removed from the clipboard. Changing the user profile will not empty the clipboard.
- Each time a user adds objects to the clipboard within a running session, the data will be added to the existing data in the clipboard.
- The **My Objects** tab will only display the sub-set of objects in the clipboard that may be selected via the selector. For example, if components and applications have been added to the clipboard, only applications will be displayed in an


application selector, only components will be displayed in a components selector, and none of the objects will be displayed in a device selector.

## Marking the Object as Reviewed




Some objects are associated with an inactivity monitor that monitors whether the object's data has been reviewed and is thus up-to-date.

An inactivity monitor is a type of monitor that alerts subscribed users about the absence of activity occurring to objects in a specified object class. The monitor owner must specify a set of objects that are to be monitored and a set of users that are defined as listeners to be alerted if the monitor is triggered. The monitor owner is typically the user responsible for the objects defined for the monitor. The monitor owner as well as the listeners will be informed via email notification if a specified object has not been edited or reviewed within a specified period of time. If the monitored object does not need to be changed, the monitor owner can mark the object as reviewed.

If changes are required for the object, an assignment can be defined and assigned to the relevant user. If no changes are required, the monitor owner or an authorized user can click the **Mark as Re-**

**viewed**  button to indicate that no explicit changes need to be made to the object but the object has been reviewed and is up-to-date. The monitor owner and listeners will then be informed that the selected object has been reviewed. The monitor owner and all monitor listeners will see that the object has been reviewed and the review date will be displayed in the **Reviewed** column in the **Objects** page view of the inactivity monitor in the **Monitors** functionality.



Please note the following about access permissions:

- If the user has ReadWrite permissions to the object and uses the **Mark as Reviewed**  button, then the object is specified as reviewed for **all** inactivity monitors associated with the object, regardless of who owns the inactivity monitor.
- If a user has ReadOnly access permission to the object and uses the **Mark as Reviewed**  button, the object will be specified as reviewed only for the inactivity monitor that the user owns.
- If the user has ReadOnly access permissions to the object and uses the **Mark as Reviewed**  button and no inactivity monitor has been defined for the object, a warning message will be displayed stating that the object is not monitored by an inactivity monitor.



For general information about monitors, see the section [Keeping Track of Objects via Monitors](#).




## Sending an Assignment About an Object to the Authorized User

If you notice that information is incomplete or inaccurate, you can create an assignment for the authorized user of the object via the **Notify Authorized User**  button displayed in the object profile. When you click the **Notify Authorized User**  button, the Notification Assignment editor opens in which you can create the assignment and specify a target date and provide a description about the issue at hand. You can


define whether the assignment is optional or whether it is mandatory. The assignment will be generated and displayed in the authorized user's **My Assignments** functionality.

Depending on the configuration of your Alfabet solution, an email notification may be sent to the authorized user of the object targeted by the assignment informing them that an assignment has been generated for the selected object. In this case, the name of the assignee will be displayed in the **To:** field of the email and the creator of the assignment will be displayed in the **From:** field of the email. If deputies are defined responsibility for the selected object in the *Authorized Deputies Page View*, they will also receive email notifications when an assignment is created. In this case, the names of the deputies will be displayed in the **CC:** field. Information about the configuration required to send emails for assignments is explained in *Configuring Email Notifications in the Context of Assignments* in the reference manual *Configuring Alfabet with Alfabet Expand*.



The **Notify Authorized User**  button is visible only if the selected object has an authorized user defined. Depending on your solution configuration, the **Notify Authorized User**  capability may be unavailable for the object class you are working with. In this case, the button will not be displayed in the toolbar of the object profile. For more information about the configuration of the assignment capability as well as the display of the **Notify Authorized User**  button, see the section *Configuring the Assignment Capability* in the reference manual *Configuring Alfabet with Alfabet Expand*. For an overview about how to use the assignment capability, see the section [Sending and Receiving Assignments for Alfabet Objects](#).

To notify the authorized user about the selected object:

- 1) Navigate to the object profile of the relevant object.
- 2) In the toolbar, click the **Notify Authorized User**  button. You will see the **Notification Assignment** editor.
- 3) Enter a title and target date for the assignment and, if necessary, provide a description or remarks about the issue at hand and attach any relevant documents or links. You can define whether this assignment is optional or whether it is mandatory that the authorized user acts on the assignment.
- 4) Click **OK** to send the assignment to the authorized user, or **Cancel** to exit without sending the assignment.

## Viewing the Change History of an Object

Alfabet provides an auditing functionality that documents the changes made to an object. You can view the audit trail only for objects that belong to an object class for which your solution designer has configured the auditing functionality. You must have ReadOnly and ReadWrite access permissions to the object to view the report.


The audit trail displays the changes made to an object's standard and custom attributes as well as its references to other objects. The audit trail includes the type of change made to the object, the user making the change, the time of the change, and the attribute or reference that has been changed. The auditing functionality is implemented on a class-by-class basis. The audit trail data can be exported to a Microsoft® Excel® file or HTML file.




Please note that the `LAST_UPDATE_USER` and `LASTUPDATE` properties are only updated in the Alfabet database when changes are made via the object's editor or editor embedded in a wizard. Changes made in page views are NOT updated in the `LAST_UPDATE_USER` and `LASTUPDATE` properties.



The auditing functionality is solely for the purposes of tracking the change history of objects in the Alfabet solution. A deleted object cannot be restored via the auditing functionality. If an object has been erroneously deleted, the object must be recreated and redefined in the Alfabet solution. For information about how to configure the auditing functionality, see the section *Specifying History Tracking for an Object Class* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- 1) In the toolbar of the object profile, click the **Audit Trail**  button. You will see the **Object Audit** page view.
- 2) All changes made to the objects standard and custom attributes are documented and highlighted yellow. Changes to the object's references are also shown. The following columns are displayed.
  - **AUDIT EVENT:** Displays the action that has occurred to the object. Possible values include:
    - Create Object
    - Change Object (changed property is highlighted)
    - Create Relation
    - Delete Relation



For the entries `Create Relation` or `Change Relation`, you can navigate to the referenced object if it still exists in the database. To do so, select the audit event and click the **Shows Referenced Objects**  button. The relevant object profile opens. Depending on your access permissions to the object, you may be able to edit it.

- **AUDIT TIME:** Displays the timestamp of the action.
  - **AUDIT USER:** Displays the name of the person that triggered the action.
  - **REL FROM:** Displays a unique internal ID of the source object of the relation.
  - **RELATION:** Displays the object class that is targeted by the relation change.
  - **REL TO:** Displays a unique internal ID of the target object of the relation.
  - **< ObjectClassAttributes >:** Each column displays the value of a standard or custom attribute that has been changed for the object. The changed value will be highlighted.
- 3) To close the view, click the **Back** button.

## Accessing Existing Publications About Objects

The **Report Publications** functionality allows authorized users to download APF (Alfabet Publication Framework) publications. APF publications are configured Microsoft® Word documents containing

information about objects in the Alfabet database. The view lists all publications created within the last month. The publications will expire one month after their creation and can no longer be downloaded.




The publication definitions and the interfaces to trigger the publications are configured by your solution designer in the configuration tool Alfabet Expand. Contact your solution designer regarding the execution of Alfabet publications. For more information about the configuration of Alfabet Publication Framework publications, see the chapter *Publishing Data In Microsoft® Word Format* in the reference manual *Configuring Alfabet with Alfabet Expand*.

Publications are configured to expire one month after creation. Expired publications will no longer be displayed in the list of publications in the table. Nevertheless they will still be available in the **Internal Document Selector** unless they are deleted by the system administrator via the batch utility *AlfaBatchExecutor.exe*. For information about the batch deletion of expired publications, see *Batch Processing for Monitors and Change Management with AlfaBatchExecutor.exe* in the reference manual *System Administration*.

To download a publication:

- 1) Click the **Refresh** button to update the table. You will see all available publications in the table.
- 2) Click the publication in the table and click the **Download Document** button.
- 3) Select the location where you want to save the document to and click **OK**. The downloaded document is a ZIP file containing the Microsoft® Word output file(s).



To delete a publication, select the publication and click the **Delete**  button in the toolbar. The publication is deleted from the view as well as irrevocably deleted from the **Internal Document Selector**. After a publication is deleted, it will no longer be available for download to Alfabet users.



## Chapter 5: Searching for Your Objects

There are a number of means available in Alfabet to find an object that you want to work with. The easiest way is to use the standard search functionalities described below. In addition, you can also access objects that are relevant to you in the following views and functionalities:

- If the AlfaBot is implemented to ease navigation to objects, you can enter a request in the AlfaBot to directly open a view or an editor for an object. For more information, see the section [Using the AlfaBot User Assistance](#).
- If the AlfaBot is implemented to analyze configured report content via a faceted search, you can enter a question in the AlfaBot requesting information about objects matching defined conditions, like for example objects of a specific class for which a specific indicator is set to a specific value. A faceted search view will then open listing all configured reports that provide the requested information. In addition, the search functionality will provide tabular datasets with relevant information if the data from the request provides a set of information which allows to create these datasets. The faceted search view might also be available via a menu option. The question can be entered directly in the view instead of the AlfaBot window. For more information, see the section [Using the AlfaBot User Assistance](#).
- To find any object that you are an authorized user of, go to the **Authorized User Objects** page view in the **Personal Info** functionality. For more information, see the section [Managing Your Objects and Object Responsibilities](#).
- To find an object that you are responsible for via an assignment, go to the **My Assignments** functionality. For more information, see the section [Sending and Receiving Assignments for Alfabet Objects](#).
- To find an object that you must process in the context of a workflow step, go to the **My Workflow Activities** functionality. For more information, see the section [Executing Workflows and Participating in Workflow Steps](#).
- To find a bookmarked view for an object, go to the **Bookmark Desktop** functionality. For more information, see the section [Creating, Managing, and Accessing Your Bookmarks](#).
- To work with your configured reports, see the section [Executing Your Configured Reports](#) in the chapter [Analyzing Your Data in Page Views and Reports](#).
- To work with your publications, see the section [Accessing Existing Publications About Objects](#).

The following information describes the basic search options available for Alfabet:

- [Finding Objects via the Global Search Field](#)
- [Searching for Objects via the Simple Search](#)
- [Conducting a Browse Search](#)
- [Conducting a Full-Text Search](#)
  - [Full-Text Search Options and Operators](#)
- [Searching an Enterprise Glossary via the Full-Text Search Capability](#)
  - [Defining Glossary Items for the Glossary](#)
  - [Organizing the Glossary Items in Glossary Folders](#)

## Finding Objects via the Global Search Field

If a global search field has been configured for the start page, it will be available on the right side of the standard Alfabet toolbar during the entire user session. The global search field allows you to search for objects in the Alfabet database. You can enter the name or partial name or ID of an object in the global search field. Once the first three letters of a search string have been entered in the global search field, the auto-fill function will invoke a search and start displaying a list of the first thirteen objects found by the query. The list of matching objects will be updated with each additional letter typed in to the search field.

You can select an object displayed via the auto-fill function or click the **Search** icon. A configured report displaying the results of the search will be displayed in the current browser tab. For more information about configuring a global search field, see the section *Configuring a Global Search Field for a Guide View or Guide Page* in the reference manual *Designing Guide Pages for Alfabet*.

## Searching for Objects via the Simple Search

The **Simple Search** functionality allows you to quickly and easily find an object for all object classes that have been configured as searchable for your user profile. Your enterprise may have configured search selectors for some of the classes available in the **Search For** field or for all of the available classes. Typically, a search selector will be customized for each object class and may consist of one or many tabs that allow you to define search criteria. It is highly recommended that you read the following information about the standard search functionalities in order to understand the basic operation of your customized search capability. If questions or errors should arise in your use of a custom search capability, please contact your enterprise's solution designer.

The **Simple Search** functionality contains a **Simple** tab that allows you to enter search criteria that returns a set of found objects. In addition to the **Simple** tab, a **Browse** tab lets you search for an object in an explorer structure and a **Full-Text** tab allows you to enter search terms for a preconfigured search group.

The **Simple** tab allows you to conduct a search based on criteria that you enter. For example, you can enter the first few letters of the object's name and select other standard object class properties and/or custom properties to include in the search criteria.


The search criteria you define is stored per object class or per object class stereotype. This means that the search string history relevant for the auto-fill capability will be different for the class Domain vs. the domain stereotype Business Capability. The search terms are persistent for later user sessions or if you change to a different user profile.

An **Add to Clipboard** functionality is also available for standard selectors and relevant custom selectors and provides a convenient means to copy multiple objects and save them to the clipboard in order to easily define them as reference objects later in the user session. For more information about using the clipboard functionality, see the section [Using the Clipboard Capability](#).







For performance reasons, the return set for any search is limited to 300 objects. If more than 300 objects are found, the search criteria should be refined. Otherwise, the object(s) you are looking for may not be included in the return set.



You can add additional columns to the table in order to display more standard or custom properties via the **Configure**  button available in toolbar. By clicking the arrows available at the top

of the columns, you can sort the data displayed in the columns. The **Configure** function is available to both ReadOnly and ReadWrite user profiles.

To conduct a simple search based on your specified search criteria:

- 1) Select the object class that you want to search for in the **Search For** field and click the **Simple** tab. If only one object class can be selected, the class will already be displayed in the **Search For** field and the filter cannot be defined. If object class stereotypes have been configured for your enterprise, the stereotypes will be displayed in the **Search For** field. However, if you select an object class stereotype for which no object has been defined on the root level of the object class stereotype hierarchy, then no results will be displayed in the **Browse** tab. For example, the object class Domain has the object class stereotypes 1) Area, 2) Sub-Area, and 3) Domain. If you select Sub-Area in the **Search For** field and no objects for the stereotype Area have been defined, a browse hierarchy cannot be displayed and thus no results will be displayed.
- 2) Click the **Simple** tab.
- 3) The search capability searches all searchable properties listed in the **Search Properties** filter by default. However, you can narrow the search criteria by specifying one or more standard object class properties and/or custom properties. For example, you could select Name in the drop-down list to base a search on a name or part of a name defined for your objects. Click the arrow symbol to open the drop-down list. Set a checkmark next to one or more attributes or click the **Select All**  button to select all attributes. You can remove a checkmark by clicking the **Clear All**  button to remove the checkmark from all attributes. Click the **Accept Selection** button  to confirm your selection or click the **Revert Selection**  button to close without making the selection.
- 4) In the **Search Pattern** field, enter additional search criteria to be searched in the properties selected in the **Search Properties** field. Please note the following guidelines:
  - If you enter the full name of an object, it must be spelled correctly
  - If you do not know the full name of an object, you may use the \* symbol as a wildcard character. For example, to find all applications beginning with the letters ABC, enter ABC\*, enter \*ABC to find applications ending with ABC, or A\*BC to find applications containing the letters ABC.



Depending on the configuration of the standard search functionalities, the wildcard \* symbol may be automatically implemented. In this case, you do not need to enter the wildcard in the **Search Pattern** field. A message will be displayed in the header panel of the **Simple** tab if the wildcard is automatically implemented and thus not required. The configuration of the automatic implementation of the wildcard is configured in the configuration tool Alfabet Expand. For more information, see the section *Configuring the Wildcard for Standard and Custom Search Functionalities* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- Use the operator **AND** to search for an object containing both of two terms. For example, entering ABC **AND** OptiRetail returns all objects with both terms ABC and OptiRetail.
- Use the operator **BETWEEN <date> <date>** or **BETWEEN <number> <number>** to search for custom attributes with values in a specific range. Be sure to use the date conventions for the culture implemented for your solution.



You can only search for dates, integers, and real numbers that have been defined for custom attributes. It is not possible to search the standard attributes Start Date and End Date.







- Use the operators <, <=, >, >=, = to specify values for integers and real numbers for custom attributes.



The format for search criteria using operators is:

```
"<operator>_<value>"
```



where \_ is a whitespace. The whitespace is mandatory.

- The characters % and \_ should be escaped because some databases regard these characters as wildcards. The % and \_ can be escaped by used square brackets [ ].
  - A validation of the search pattern you specify will be performed. The search pattern will not be applied to any of the selected search attributes if the search pattern does not match the type of the search attribute. (For example, if you select a custom property for which an integer must be entered as a value but you enter text in the **Search Pattern** field, the custom property will automatically be dropped from the list of search attributes).
- 5) Click the **Search** button to execute the search based on your settings. Please keep the following in mind:
- Click and hold on any object in the results list to open a preview about the object. Click anywhere outside of the preview window to close it.
  - The number of results found by the search will be displayed in the header of the results table. Up to 300 objects may be found in the search. Each page in the results will display 100 results.
  - To navigate forward to the next page of results, click the **Next Page**  button.
  - To navigate forward to the last page of results, click the **Last Page**  button.
  - To navigate back to the previous page of results, click the **Previous Page**  button.
  - To navigate open to the first page of results, click the **First Page**  button.
  - Depending on the context in which you have opened the object selector, it may be possible to select multiple objects in the object selector. If this is the case, use CTRL + click to simultaneously select multiple objects in a page. Multiple objects can only be selected on one page at a time in the object selector. If you click the **Next Page** , **Last Page** , etc. buttons, your selection will be lost.
- 6) Select the object you want to add and click the **OK** button.

## Conducting a Browse Search

The **Browse** functionality allows you to browse through an object hierarchy to find the object you are looking for. For example, you could search for a specific domain by searching through the hierarchical structure of domains defined for your enterprise. Not all object classes listed in the **Search For** field can be meaningfully searched in the **Browse** functionality. The browse functionality requires that you search for an object

by means of an explorer structure. Therefore, the object must be structured in an object hierarchy in order to be found via the browse. All available hierarchies will be displayed in the explorer.

- 1) Select the object class that you want to search for in the **Search For** field and click the **Browse** tab. If only one object class can be selected, the class will already be displayed in the **Search For** field and the filter cannot be defined. If object class stereotypes have been configured for your enterprise, the stereotypes will be displayed in the **Search For** field. However, if you select an object class stereotype for which no object has been defined on the root level of the object class stereotype hierarchy, then no results will be displayed in the **Browse** tab. For example, the object class Domain has the object class stereotypes 1) Area, 2) Sub-Area, and 3) Domain. If you select Sub-Area in the **Search For** field and no objects for the stereotype Area have been defined, a browse hierarchy cannot be displayed and thus no results will be displayed.
- 2) Browse through the hierarchy to locate the object you want. Click  to expand the explorer and click  to collapse it.
- 3) Click and hold on any object in the explorer to open a preview about the object. Click anywhere outside of the preview window to close it.
- 4) Select an object and click the **OK** button.

## Conducting a Full-Text Search

The **Full-Text Search** functionality allows you to execute a full-text search for specific terms for a search group configured by your solution designer.

Search groups provide full-text search for the following scopes:

- Globally-defined search groups provide a full-text search capability for a set of objects of defined object classes, such as applications and ICT objects or business processes and organizations. The **Full-Text Search** functionality available via the menu or a guide page or guide view provides search capabilities on basis of globally-defined search groups.
- Object-centric search groups provide a full-text search capability for a set of objects that are related to the object you are currently working with. The **Full-Text Search** page view in the object profile of an object provides search capabilities on basis of object-centric search groups. The search for glossary terms in the [Glossary](#) functionality and in domain glossaries is also provided via an object-centric search group that finds glossary items from the selected glossary only.



Search groups and the Alfabet queries that are executed for the search are configured by your solution designer in the configuration tool Alfabet Expand. For more information, see the section *Configuring the Full-Text Search Capability* in the reference manual *Configuring Alfabet with Alfabet Expand*.

In order to execute a search based on a search group, a search index must first be created. Once the search index has been created, the index should be updated regularly to reflect changes made to the inventory. The search index must then be updated in regular intervals. For globally-defined search groups, this is done centrally by an administrator. If the message in the header for **Group Info** indicates that an index has not yet been created for the selected search group, please contact your user administrator.



For more information about the methods available for creation and update of the search index for globally-defined search groups, see the section *Creating an Index for the Full-Text Search* in the reference manual *User and Solution Administration*.

For object-centric search, you can create and update the index directly on the **Full-Text Search** page view. The full-text search can be conducted in the primary language as well as in all secondary languages for which a culture has been configured by your the enterprise. If you create a search index for an object-centric search index, an index file is created for the combination of the selected search group, the object you are currently working with and the current language setting for the Alfabet user interface. If you change to another object, another search group for the same object or another interface language setting, a new search index file is required for the search. After having selected a search group, you are informed via a text in the filter field whether a search index exists and when the last update was performed. It is recommended to update the search index for object-centric full-text search prior to searching for an object via a search string.

Please note the following about the full-text search:

- For performance reasons, the return set for any search is limited to 300 objects. If more than 300 objects are found, the search criteria should be refined. Otherwise, the object(s) you are looking for may not be included in the return set.
- You can use a number of operators to focus your search. For more information, see [Full-Text Search Options and Operators](#) below.
- If you are searching for data in a secondary language, only values available in the current language are included into the search. For example if the search group provides a search in the name and description of objects of an object class and the object class is configured to provide no translation capability for the name of the objects, you cannot find objects by name in the full-text search of any secondary language. You will only find results in the translation if a translation into the language you are conducting the search for is currently provided for the description. If you are for example searching for a string in the name and description of an object, and the name of the objects is not translatable for the object class, the search will only find results in the descriptions for that a translation is provided. Nevertheless you will see the name of the object in the primary language in the search results if it is defined in the search group to be used as informational text to identify the object.



For example if the name of applications is not translatable, but displayed in the search results of the full-text search, and an application is named `TradingApp`, you will not find the application if you are searching for the string "Trading". You may find the application via a search string included into any searchable and translated property, like the description. It is then listed in the search results as `TradingApp`.

To execute a full-text search:

- 1) Define your search criteria at the top of the screen. You can narrow your search by using a combination of filters. The filters are described below:



- **Search Group:** This field allows you to select a preconfigured search group.




If you are executing a full-text search in a glossary in the **Search** module, the pre-configured search group `Glossary` will be automatically displayed.





- **Group Info:** Displays the date of the last update to the selected search group's index. If you see a message stating that an index does not exist, then an index must first be created to



perform the search. If the last update has been performed a long time ago, the index shall be updated. Click the button **Create Index** to create or update the search group's index. If the button is not available, the search group is a globally-defined search group and the search index must be created or updated by an administrator.

- **Search for:** Enter the search term for the search group. A wildcard may only be appended to the end of the search term. For more information about search options and operators, see the section [Full-Text Search Options and Operators](#).
  - **Fuzziness:** Define the level of tolerance regarding the search pattern. A number between 0-10 can be selected in the field to specify how many characters are allowed to potentially not match the search pattern. The higher the value, the more differences are tolerated.
  - **Show As Data Set:** Select if you want to see a table showing all results from the search. You can click a result in the table and hold to see a preview of the object. If you do not select the checkbox, you will see one result at a time in the page view area. You can then use the **Previous** and **Next** buttons to navigate forward or back to the relevant search result.
- 2) After you have defined your search criteria, click **Search**. You will see the search results in page view area:
- If you have not selected the **Show as Data Set** checkbox, you will see the first result found by the search. Each occurrence of the defined search criteria is highlighted. Click the **Previous**  and **Next**  buttons to navigate forward or back through the search results.
  - If you have enabled the **Show as Data Set** checkbox, you will see all search results in a table. Click a result in the table and hold to see a preview of the object. The text matching the search criteria is highlighted.
  - The results will be sorted according to the number of matches with the search criteria.

 If an index has not been created for the search group, a message will be displayed below the toolbar.

3) To navigate to the object profile of an object found by the search: and :

- If you have not selected the **Show as Data Set** checkbox, click the **Previous**  and **Next**  buttons to find the object that you want to navigate to. When the object is displayed, click the **Navigate**  button in the toolbar.
- If you have enabled the **Show as Data Set** checkbox, select an object in the table and click the **Navigate**  button in the toolbar.

 If multiple objects are selected, the **Navigate**  button will be disabled.

## Full-Text Search Options and Operators

After an index has been created, you can use a number of operators to focus your search. Please take the following into consideration when defining a search term:

- Use a backslash \: to escape special characters: + - && || ! ( ) { } [ ] ^ " ~ \* ? For example, to find the application named !TradeNet, you would enter \!TradeNet.
- The full-text search is not case-sensitive. Capitalization will not influence your results.



A search term must begin with an alphabetic character. A wildcard at the beginning of a search term is not valid (for example, \*ptiRetail).

The following search options are available for a full-text search:

Search Option	Operator	Example	Result
single term		OptiRetail	Returns all objects with OptiRetail in the queried search criteria.
phrase	" "	"OptiRetail Marketing"	Indicates a phrase. Returns all objects with OptiRetail Marketing in the queried search criteria.
multiple character wildcard search	*	OptiRetail*	Returns all objects that begin with OptiRetail. For example, results could include OptiRetail and OptiRetailing.   A wildcard may only be appended in the middle or the end of the search term. Wildcards positioned at the beginning of the search term are not valid for the full-text search.
positive terms	+	+TradeNet +OptiRetail	Indicates words that must be contained in the search results.  All search results must contain OptiRetail and TradeNet.
negative terms	-	-TradeNet OptiRetail	Indicates words that may not be contained in the search results.  All search results may contain OptiRetail and must not contain TradeNet.



## Searching an Enterprise Glossary via the Full-Text Search Capability

The **Glossary** functionality allows you to create and structure a glossary for the enterprise and define glossary items for it. Each glossary item has a name and glossary definition. Users can then execute a full-text search for terms in a glossary.




In order to implement the **Glossary** functionality, the following is required:

- A search group must be configured in the configuration tool Alfabet Expand. For more information about the configuration required, see the section *Configuring the Full-Text Search Capability* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- An index must first be created by a solution administrator in the **Full-Text Search** functionality accessible via the `Admin` user profile. Once an index is created, the index should be updated regularly to reflect changes made to the inventory. For more information, see *Creating an Index for the Full-Text Search* in the reference manual *User and Solution Administration*.
- Once the glossary has been defined and the index has been created by an administrator in your enterprise, the glossary can be searched in the **Full-Text Search** capability. For more information, see the section [Conducting a Full-Text Search](#) in the reference manual *Getting Started with Alfabet*.



The *Domain Glossary Page View* provides another glossary functionality in the context of Domain Management. A domain glossary allows users to define domain-specific terminology for objects assigned to a selected domain. The domain glossary can be created and searched **ONLY** in the *Domain Glossary Page View* in the Domain object profile.

The **Glossary Manager** explorer displays the object class `Glossary` . This explorer allows you to create and structure a glossary and define glossary items for it. You can create an unlimited number of glossaries and then structure them and fill them with glossary items. To create a glossary:

- 1) Click the **Glossary Manager** icon at the top of the explorer.
- 2) In the toolbar, click **New > Create New Glossary**. The **Glossary** editor opens.
- 3) Enter a name and, if necessary, brief description of the glossary and click **OK** to save the glossary or **Cancel** to exit without saving.

The following information is available:

- [Defining Glossary Items for the Glossary](#)
- [Organizing the Glossary Items in Glossary Folders](#)

### Defining Glossary Items for the Glossary

A glossary item allows you to define a glossary entry. Each glossary item has a name and definition that can later be searched by means of a full-text search. You can define an unlimited number of glossary items for

the glossary. Glossary items can be assigned directly to a selected glossary or to a glossary folder defined for a glossary. A glossary item may only be assigned to one glossary.

To define a glossary item for a glossary or glossary folder:

- 1) In the **Glossary Manager** explorer, click the glossary or folder that you want to assign the glossary item to.
- 2) In the glossary's or glossary folder's object profile, go to the **Structure** workspace and click **Glossary Items**.
- 3) In the toolbar, click **New > Create New Item**. The **Glossary Item** editor opens with the following fields:
  - **Name:** Enter a unique name for the glossary entry.
  - **Description:** Enter text defining or explaining the meaning or purpose of the glossary item. Users will be able to search the name and text entered in the description field by means of a full-text search.
- 4) Click **OK** to save the glossary item.

## Organizing the Glossary Items in Glossary Folders

In the **Glossary Folders** page view, you can create and edit glossary folders for a glossary or for a glossary folder of a glossary. You can create an unlimited number of folders and sub-folders to structure glossary items assigned to a glossary.

To create a glossary folder:

- 1) In the **Glossary Manager** explorer, click the glossary or glossary folder that you want to define a folder or sub-folder for.
- 2) In the glossary's or glossary folder's object profile, go to the **Structure** workspace and click **Glossary Folders**.
- 3) In the toolbar, click **New > Create New Sub-Folder**. The **Glossary Folder** dialog box opens with the following fields:
  - **Name:** Enter a unique name for the glossary folder.
  - **Description:** Enter text defining or explaining the meaning or purpose of the glossary folder.
- 4) Click **OK** to save the glossary folder.



To move a glossary folder assigned to the selected folder or glossary, click the folder in the table and select **New < Move Existing Folder Here**.

## Chapter 6: Managing Your Objects and Object Responsibilities

In Alfabet, most objects are assigned to an authorized user, user group, or organization that is held accountable for the object or specific aspects of the object.



The **Personal Info** functionality will be disabled in the Alfabet user interface for users logged in as anonymous users.

The **Personal Info** functionality provides you with an overview of the following:

- the objects that you are the authorized user of
- the objects that you have been assigned a deputy responsibility for
- the objects for which you have a role assigned
- the workflow steps that you are responsible for
- a schedule of your availability and planned absences in the enterprise
- the users who should act as a proxy in your absence and who will be responsible for your objects, assignments, and workflows when you are unavailable.



A detailed description of access permissions in Alfabet is described in the section [Understanding Access Permissions in Alfabet](#).

The following information is available about managing your objects and object responsibilities:

- [Viewing and Editing the User and Deputy Information for Your Objects](#)
- [Viewing and Reassigning Your Role Objects](#)
- [Viewing and Reassigning a Your Workflow Steps](#)
- [Defining Your Availability and Planned Absences](#)
- [Defining Proxies for Your Assignments and Workflow Steps](#)
  - [Defining a General Proxy to Manage All Workflow Steps and Assignments](#)
  - [Defining a Proxy to Manage Your Assignments](#)
  - [Defining a Proxy to Manage Your Workflow Steps](#)

### Viewing and Editing the User and Deputy Information for Your Objects

In Alfabet, most objects are assigned to a user, user group, or organization that is held accountable for an object or specific aspects of an object. In the **Authorized User Objects** page view you can view all objects that you are the authorized user for and thus have the primary responsibility for. Additionally, you can define one or more deputies to act on your behalf for any objects displayed in the table.



Please note that the `LAST_UPDATE_USER` and `LASTUPDATE` properties are only updated in the Alfabet database when changes are made via the **User** editor. Changes made in the **Authorized User Objects** page view are NOT updated in the `LAST_UPDATE_USER` and `LASTUPDATE` properties. For more information about the history tracking capability, see the section [Viewing the Change History of an Object](#).

- 1) In the **Personal Info** functionality, Click **Authorized User Objects**.
- 2) You can assign a new authorized user, authorized user group, or deputy to an individual object that you select in the table. In the **Select Class** field, select the object class whose objects you want to define and click **Update**.
  - To add a deputy to an object, select the object in the table and click **Edit > Set Deputy for Selected Object(s)**. Although multiple deputies can be assigned to an object, you can only define one deputy at a time.
  - To change the deputy for an object, select the object in the table and click **Edit > Substitute Deputy for Selected Object(s)**.
  - To remove all deputies from an object, select the object in the table and click **Edit > Remove Deputies for Selected Object(s)**.
  - To assign a new authorized user to an object, select the object in the table and click **Edit > Substitute Authorized Access for Selected Object(s)**.
  - To change the authorized user or authorized user group for an object, select the object in the table and click **Edit > Change Authorized Access for Selected Object**.
  - To assign an authorized user group to an object, select the object in the table and click **Edit > Add User Groups to Selected Object(s)**.
  - To make any of the changes above to all objects displayed in the view, select the respective option in the **Edit** menu targeting all objects.

## Viewing and Reassigning Your Role Objects

A role defines the functional relationship or responsibility that a user or organization has to an object. A role is based upon a configured role type that is configured for an object class. Roles are defined for informational purposes only and provide detail about users or organizations that may have information about or a stake in the object. The definition of a role for an object does not impact access permissions.

In the **Role Objects** page view, you can view all objects for which a selected user has a role assigned. Additionally, you can remove a role object from a selected user and reassign it to another user. A user can be assigned a functional role for an object in the *Responsibilities Page View* for the relevant object.

- 1) Navigate to the **Personal Info** functionality and click **Role Objects**.
- 2) In the **Select Class** field, select the class of objects in the drop-down list that you want to display in the table and click **Update**.
- 3) The following options are available:
  - To change the role for an object, select the object in the table and click **Edit > Substitute Responsibility for Selected Object(s)**.

- To remove all roles from an object, select the object in the table and click **Edit > Remove Responsibility for Selected Object(s)**.
- To make any of the changes above to all objects displayed in the view, select the respective option in the **Edit** menu targeting all objects.




For more detailed information about access permissions in Alfabet, see the section [Understanding Access Permissions in Alfabet](#) in the reference manual *Getting Started with Alfabet*.

## Viewing and Reassigning a Your Workflow Steps

The **User's Workflow Activities** page view displays all workflow steps that you are responsible for. You can reassign individual workflow steps to another user. The following columns are displayed in the view:

- **Workflow:** Displays the name of the workflow that the workflow step belongs to.
  - **Workflow ID:** Displays the identification number of the workflow that is being processed.
  - **Object Name:** Displays the name of the object that is being processed in the workflow step.
  - **Object ID:** Displays the identification number of the object that is being processed in the current workflow step.
  - **Active Step:** Displays the name of the workflow step that is currently being performed in the workflow.
  - **Step ID:** Displays the identification number of the workflow step that is being processed.
  - **Previous Step:** Displays the name of the workflow step that was performed prior to the current workflow step.
  - **Enter Date:** Displays the timestamp showing when the workflow advanced to the current workflow step.
  - **Remaining Days:** If a deadline has been configured, displays the number of days left before the workflow step expires.
  - **Ready:** Displays a checkmark if the current workflow step has been performed and is ready to be confirmed and completed.
  - **Locked By:** Displays the name of the user who is currently working on the workflow step.
  - **Current Step Comments:** Displays a checkmark if a comment has been made for the current workflow step. To access the comment, select the workflow step, click the **Navigate**  button and click **Active Step Activities** to view the comments in the **Message** column.
  - **Previous Step Comments:** Displays a checkmark if a comment has been made for the previous workflow step. To access the comment, select the workflow step, click the **Navigate**  button and click **Activities of Preceding Steps** to view the comments in the **Message** column.
- 1) In the **Personal Info** functionality, click **User's Workflow Activities**.
  - 2) Select the workflow step that you want to delegate.

- 3) In the **My Workflow Activities** view, click the **Delegate**  button.
- 4) In the person selector, select the person you want to reassign the responsibility of the workflow step to and click **OK**. The **Delegate Workflow Step** editor opens.
- 5) Define the following fields, as needed:
  - **Substitute All Current Workflow Step Owners:** Select if all users currently responsible for the selected workflow step should be replaced by the user(s) that the workflow step is being delegated to.
  - **Revoke Responsibility from Current User:** Select this checkbox if you want to remove yourself as a user responsible for the workflow step that is being delegated. Clear this checkbox if you to include yourself as a user responsible for the workflow step that is being delegated.
  - **Comment:** Provide an explanation about why the workflow is being delegated to another user. The explanation will be displayed in the **Message** column of the **Workflow Step Event Trace** page view.
  - **Delegates:** Click the **Add Person** button to select one or more persons to delegate the workflow step to.
- 6) Click **OK** to save your changes. The responsible user will find the workflow step in the **Workflow Activities Explorer** or **My Workflow Activities** view.

## Defining Your Availability and Planned Absences

Many tasks in Alfabet must be completed by a specified deadline. Therefore, it is recommended that you document the times that you are available as well as the times that you plan to be absent in the **User's Availability** page view.

The proxy user(s) that you define in the *User's Proxies Page View* will be responsible for the assignments or workflow steps during your absences. The proxy can then access your assignments in his/her **My Assignments** functionality and your workflow steps in his/her **My Workflow Activities** functionality. The **User's Availability** page view lists all periods of availability and absence that have already been defined for you. The following information is available:

- **Start Date:** Displays the start date of the entry.
- **End Date:** Displays the end date of the entry.
- **Absent:** Displays a checkmark if you will be absent during this period. A checkmark is not displayed if you will be available during this period.
- **Description:** Displays a comment about the entry.



It is also possible for your user administrator to document your availability and planned absences as well as define proxies for your assignments or workflow steps.

To define a period of availability or absence:

- 1) Navigate to the **Personal Info** functionality and click **User's Availability**.
- 2) In the toolbar, click **New > New Availability Entry** in the toolbar.

3) Enter information in the following fields, as needed.

**Basic Data** tab:

- **Start Date:** Enter a start date for the entry.
- **End Date:** Enter an end date for the entry.
- **Availability Type:** Select a type of availability/absence in the drop-down list.



The values available for the **Availability Type** property are preconfigured in the configuration tool Alfabet Expand. For more information, see the section *Overview of Protected Enumerations* in the reference manual *Configuring Alfabet with Alfabet Expand - Appendix*.

- **Absent:** Select the checkbox if the definition specifies a period of absence. Leave the checkbox blank if the definition specifies a period of availability.
  - **Description:** Enter a meaningful description that will clarify the entry.
- 4) Click **OK** to close the editor and save your data.

## Defining Proxies for Your Assignments and Workflow Steps

Many tasks in Alfabet must be completed by a specified deadline. Therefore, it is recommended that you specify alternate persons to take care of your responsibilities in case of a planned absence. You can define proxies to be responsible for assignments associated with objects of a specific object class as well as workflow steps generated in the context of a specific workflow template. Additionally, you can define a general proxy to be responsible for all of your workflow steps or assignments.

During the times that you are absent as specified in the *User's Availability Page View*, each proxy user you have defined will have the necessary access permissions to the assignments or workflow steps that he/she is responsible for via the proxy assignment. Your assignments will be accessible in the proxy's **My Assignments** view and your workflow steps will be accessible in the proxy's **My Workflow Activities** view.



Your planned absences and general availability must be documented in the *User's Availability Page View*.



Email notifications will continue to be sent to the original user if the email notification capability has been implemented for the relevant workflow templates. Please note that the proxy user will NOT receive email notifications. A notification monitor can be configured to notify the proxy about the workflow step. For more information, see the section *Defining Notification Monitors* in the reference manual *User and Solution Administration*.

The **User's Proxies** page view lists all proxies that have been defined to cover your responsibilities during your planned absences.

- **Category:** Displays **Assignments** if the proxy is responsible for assignments, **Workflows** if the proxy is responsible for workflow steps, or **General** if the proxy is responsible for all of assignments and workflow steps.
- **Sub-Category:** This column may display either of the following:

- Displays the object classes for which the proxy has access permissions in the case of assignments. The proxy will only be responsible for assignments targeting objects in the specified object classes.
- Displays the workflow template owning the workflow steps for which the proxy has access permissions. The proxy will only be responsible for workflow steps based on the selected workflow templates.
- **First Name:** The proxy's first name.
- **Name:** The proxy's family name.

The following is possible in the **User's Proxies** page view:

- [Defining a General Proxy to Manage All Workflow Steps and Assignments](#)
- [Defining a Proxy to Manage Your Assignments](#)
- [Defining a Proxy to Manage Your Workflow Steps](#)

## Defining a General Proxy to Manage All Workflow Steps and Assignments

You can define a general proxy who will be responsible for all workflow steps and assignments that you are responsible for. You should only assign one user as a general proxy.

To define a general proxy:

- 1) Navigate to the **Personal Info** functionality and click **User's Proxies**.
- 2) In the toolbar, click the **Add General Proxy** button in the toolbar. The **Proxy Definition** editor opens.
- 3) In the editor that opens, select the user in the **Proxy** field.
- 4) Click **OK** to close the editor and save your data.

## Defining a Proxy to Manage Your Assignments

Because assignments must be completed by a specified deadline, it is recommended that you specify alternate persons to take care of your assignments in case of a planned absence. You can define proxies to be responsible for assignments targeting objects for a specific object class. You should not assign more than one user per object class.

During the times that you are absent as specified in the **User's Availability** page view, each proxy user you have defined will have the necessary access permissions to the assignments that he/she is responsible for via the proxy definition. The assignments will be accessible in the proxy's **My Assignments** view.



Your planned absences and general availability must be documented in the *User's Availability Page View*.



Email notifications will continue to be sent to the original user. Please note that the proxy user will NOT receive email notifications. A notification monitor can be configured to notify the proxy



about the workflow step. For more information, see the section *Defining Notification Monitors* in the reference manual *User and Solution Administration*.

To define a proxy for your assignments:

- 1) Navigate to the **Personal Info** functionality and click **User's Proxies**.
- 2) In the toolbar, click the **Add Assignments Proxy** button. The **Proxy Definition** editor opens.
- 3) In the editor that opens, select a user in the **Proxy** field.
- 4) In the **Sub-Categories** field, select the object class that the assignments are based on that is relevant for the selected person. This person will only be authorized to view and access assignments that are created for objects in the selected object class(es).
- 5) Click **OK** to close the editor and save your data.

## Defining a Proxy to Manage Your Workflow Steps


Because workflow steps must be completed by a specified deadline, it is recommended that you specify alternate persons to take care of your responsibilities in case of a planned absence. The **User's Proxies** page view allows you to define proxies to be responsible for workflow steps generated in the context of a specific workflow template. In this way, you can assign the appropriate person for each workflow context. You should not assign more than one user per workflow template.

During the times that you are absent as specified in the *User's Availability Page View*, each proxy user you have defined will have the necessary access permissions to the workflow steps that he/she is responsible for via the proxy assignment. Your workflow steps will be accessible in the proxy's **My Workflow Activities** views as well as the **Associated Workflows** page view for the relevant object.



Email notifications will continue to be sent to the original user if the email notification capability has been implemented for the relevant workflow templates. Please note that the proxy user will NOT receive email notifications. A notification monitor can be configured to notify the proxy about the workflow step. For more information, see the section *Defining Notification Monitors* in the reference manual *User and Solution Administration*.

To define a proxy for your workflow steps:

- 1) Navigate to the **Personal Info** functionality and open the **User's Proxies** page view.
- 2) In the toolbar, click the **Add Workflows Proxy**  button. The **Proxy Definition** editor opens.
- 3) In the editor that opens, you will see your user name in the **Person** field. In the **Proxy** field, select the user that you want to assign the responsibility to.
- 4) You will see **Workflows** selected in the **Category** field. In the **Sub-Categories** field, select the workflow template that the workflows are based on that is relevant for the selected proxy. The proxy will only be authorized to view and access workflow steps that are generated in context of the selected workflow template(s).
- 5) Click **OK** to close the editor and save your data.

## Chapter 7: Managing Your Calendar, Tasks, and Timesheets

Alfabet allows you to create personal calendars with blockout days that represent weekends, holidays, etc. so that you can track the hours worked on tasks that have been defined to you via skill requests for objects such as projects, applications, operational business supports, tactical business supports, strategic business supports, components, standard platforms, devices, deployments, and service products.



Enterprise calendars are configured in the **Enterprise Calendars** functionality. For more information about configuring enterprise calendars for the user community, see the chapter *Configuring Enterprise Calendars for the User Community* in the reference manual *Configuring Evaluation and Reference Data in Alfabet*.

The following information is available:

- [Creating Your Personal Calendar](#)
- [Managing Your Tasks and Tracking Time](#)
- [Submitting Timesheets of Time Worked On Your Tasks](#)
- [Approving the Timesheets That You Are Responsible For](#)
- [Managing Your Submitted Timesheets](#)

### Creating Your Personal Calendar



The **My Calendars** functionality allows you to define one calendar per calendar year. You can base your calendar on an enterprise calendar that has been defined and made available by your enterprise. The enterprise calendar will typically include blockout days, which are the days that represent weekends and holidays relevant for your region. All blockout days defined for the enterprise calendar will be copied to your personal calendar. You can add additional blocked out days, as needed, or remove unnecessary ones. Regardless of the definition of blockout days, you will be able to record hours for any calendar day in the **My Tasks and Time Reporting** functionality.

To display your personal calendar created for a specific year, select the year in the **Year** field. To display all of your personal calendars regardless of the year that they were created for, select the empty row in the **Year** field.

To create a personal calendar:

- 1) In the toolbar, click **New > Create New Calendar**. The **Create Personal Calendar** editor opens.
- 2) Define the following fields, as needed:
  - **Select Year:** Select the year that you want to create a personal calendar for. A year will not be displayed if a calendar has already been created for that year.
  - **Select Enterprise Calendar:** Select the enterprise calendar that you want to use as a template for your personal calendar. Only the enterprise calendars created for the year you are defining the calendar for will be displayed. All blockout days defined for the enterprise calendar will be copied to your personal calendar. Enterprise calendars are configured in the **Enterprise Calendars** functionality. For more information about configuring enterprise calendars for the user community, see the chapter *Configuring Enterprise Calendars for the*

*User Community* in the reference manual *Configuring Evaluation and Reference Data in Alfabet*.

- 3) Click **OK** to save your changes. The new personal calendar is displayed in the table.
- 4) You can now edit the blackout days, if necessary. To do so, select the calendar in the table and click **Edit Blackout Days**. The **Calendar Content** view opens displaying your personal calendar for the selected year. The days that are highlighted in the calendar represent days that have been blocked out. Select a day and click the **Edit** button to view more information about the blocked out day.
- 5) You can define blackout days using any of the methods described below:
  - To define a specific day as a blackout day: Select a day in the calendar and click **New > Create New Blackout Day**. In the editor, revise the **Start Date** and **End Date** fields, if needed. Enter a name in the **Name** field and a description in the **Description** field and click **OK**. The blackout day is highlighted in the calendar.
  - To copy all blackout days defined from another existing enterprise calendar to the selected enterprise calendar: Click **New > Copy Blackout Days from Another Calendar**. The object selector displays all defined enterprise calendars for the same year that you are defining. Select the enterprise calendar that you want to copy to the selected calendar and click **OK**. Additional blackout days from the enterprise calendar will be copied to your personal calendar. The blackout days are highlighted in your personal calendar.
  - To blackout specific days of every week in your personal calendar: Click **New > Block Out Specific Weekdays**. In the editor, click each day that should be highlighted as a blackout day in your personal calendar. Define the **Start Date** and **End Date** fields and enter a name for the blocked out days in the **Blockout Calendar Item Name** field (for example: Weekend). The name you define will be displayed in a tooltip when the you point to the day in the calendar. Click **OK** to save your changes.
  - To edit the blackout day definition: Select the day in your personal calendar and click the **Edit**  button. You can edit the **Start Date** and **End Date** fields, change the name of the blackout calendar item in the **Name** field, or add comments about the blackout day in the **Description** field. Click **OK** to save your changes.
  - To remove the blackout day definition from a day in your personal calendar: Select the day in the calendar and click the **Delete**  button. Confirm the message by clicking **Yes**. The blackout day is no longer highlighted.
  - To remove all blackout day definitions from your personal calendar: Click **New > Clear All Blackout Days**. Confirm the message by clicking **Yes**. The blackout days are no longer highlighted.

## Managing Your Tasks and Tracking Time

The **My Tasks and Time Reporting** functionality allows you to track the hours worked on tasks that have been defined to you via skill requests for objects such as projects, applications, operational business supports, tactical business supports, strategic business supports, components, standard platforms, devices, deployments, and service products. The hours are tracked in your personal calendar that you create in the **My Calendars** functionality. Regardless of the definition of blackout days in your calendar, you can record hours worked on your tasks for any calendar day.



The hours that you track for projects will be displayed in the **Task Time Schedule** page view that can be accessed via the *Project Resource Planning Page View*. The hours that you defined for tasks in this view can be submitted for approval in a timesheet in the [My Time-Tracking Entries Functionality](#).

Define the **Start Date** field and **End Date** field in order to display all tasks assigned to you beginning between the defined start and end date or ending before the defined start and end date will be displayed and click **Update**. The following columns are displayed:

- **Task**. Displays the task defined for the skill request that needs to be worked on.
- **Start Date**: Displays the start date of the task.
- **End Date**: Displays the end date of the task.
- **Count**: Displays the number of man days or persons requested for the task.



Please note that if the **Capacity Type = Head Count** and the value in the **Count** column is greater than 1, you should contact the authorized user of the object in the **Requested For** column for clarification.

- **Capacity Type**: Displays whether the value in the **Count** column refers to **Head Count** or **Man Days**.
- **Requested For**: Displays the name of the project, application, operational business support, tactical business support, strategic business support, component, standard platform, device, deployment, or service product that is requiring the task.
- **Status**: Displays the release status of the project or the object state of the architecture object displayed in the **Requested For** column.
- **Reported Hours**: Displays the number of hours that you have worked on the task.

You can document the hours that you have worked on a task displayed in the view. To define the hours worked on the tasks:

- 1) Select the task for which you want to document the hours that you have worked on the task and click the **Time Tracking** button.
- 2) In the **Time Tracking** editor, the following is possible to define the hours worked:
  - To define individual dates: Enter the individual hours worked in the respective field in the **Hours** column and define the **Comments** field, as needed. Do this for all dates that you want to document your hours for.
  - To define multiple dates simultaneously: Enter the number of hours that you want to assign to multiple dates in the **Hours** field in the header of the editor. You can also define a comment in the **Comments** field. Pressing the CTRL key, click the relevant dates in the **Date** field that you want to copy the hour value and comment value to and click the **Copy to Selected Dates** button.



Regardless of the definition of blockout days in your calendar, you will be able to record hours for any calendar day. Please note however that you cannot modify a time-track entry that has been submitted in a timesheet and has the status **Approved**. These time-track entries will be displayed but cannot be edited.

- 3) Click the **OK** button to save the time tracking definition or click **Cancel** to exit without saving.

## Submitting Timesheets of Time Worked On Your Tasks

The **My Time-Tracking Entries** functionality allows you to review and submit timesheets documenting the hours worked on tasks that have been defined to you via skill requests for objects such as projects, applications, operational business supports, tactical business supports, strategic business supports, components, standard platforms, devices, deployments, and service products. In this view, you can modify the hours defined in the **My Tasks and Time Reporting** functionality as well as submit timesheets for approval. Each entry of hours for a task is considered a time-tracking entry.

A time-tracking entry may only be submitted once for a given day/task. Multiple time-tracking entries may be bundled in a timesheet and submitted for approval. A timesheet may contain a one or more time-tracking entries. Please note the following:

- Undefined time tracking entries may be defined at any time. An undefined time-tracking entry will have the status **Entered**.
- Only time-tracking entries that are explicitly selected to be submitted will be included in a timesheet and sent for approval. A time-tracking entry that is submitted but not yet approved will have the status **Submitted**.
- A time-tracking entry may be rejected by the responsible user. A rejected time-tracking entry will have the status **Rejected**. A rejected time-tracking entry may be redefined and resubmitted.
- A time-track entry that has been submitted in a timesheet and has the status **Approved** cannot be modified. Time-track entries with the status **Approved** will be displayed in the **Time Tracking** editor but cannot be edited.
- The timesheets will be available in the **Timesheet Approval** functionality of the person responsible to approve the hours worked for the object targeted by the task.
- All timesheets that you have submitted will be displayed in the **My Timesheets** functionality. The view provides information about the status of each timesheet.



The capability to process and approve timesheets can be adapted to the timesheet approval process required in your enterprise via additional solution configuration. To this end, custom properties and custom editors/wizards can be configured by your solution designer for the object class `Timesheet` and workflows can be specified to ensure that your enterprise's regulations are complied with and its processes for timesheet approval are correctly carried out.

You can modify the hours worked and submit the time-track entries for the tasks displayed in the view. To specify which time-track entries are displayed in the view, define the following filter settings and click **Update**:

- **Start Date:** Select the start date of the period of time-track entries that you would like to display.
- **End Date:** Select the end date of the period of time-track entries that you would like to display.
- **Statuses:** Specify one or more statuses to display in the view. For example, to display all time-track entries for the defined period that need to be processed, select the statuses **Entered** and **Rejected**.
- **Object.** Select the object whose tasks you want to process.

The view displays all relevant tasks for which hours have been defined in the **My Tasks and Time Reporting** functionality. The following columns are displayed:

- **Task:** Displays the name of the task associated with the object selected in the **Object** filter.

- **Object:** Displays the name of the object and the object class in parenthesis () for which the task has been defined.
- **Date:** Displays the date that the task was worked on.
- **Value:** Displays the number of hours that the task was worked on for the corresponding date.
- **Status:** Displays the status of the time-track entry. The status will only be set once the time-track entry has been bundled in a timesheet which has been submitted.
- **Submission Date.** Displays the date that the time-track entry was submitted for approval via a timesheet.

You can edit the hours for any non-approved time-tracking entry displayed in the view. To edit the hours worked on the tasks:

- 1) Select the task for which you want to edit the hours that you have worked on the task and click the **Time Tracking** button
- 2) In the **Time Tracking** editor, select the year that you want to define hours for in the **Year** field and select the month that you want to define hours for in the **Month** field. Only the months and years that fall within the task's start date and end date can be selected. Once you have defined the **Year** and **Month** fields, the **Date** column will be updated to include the specified time period.



Regardless of the definition of blockout days in your calendar, you will be able to record hours for any calendar day. Please note however that you cannot modify a time-track entry that has been submitted in a timesheet and has the status **Approved**. These time-track entries will be displayed but cannot be edited.

- 3) You can now do one of the following to define the hours worked:
  - To define individual dates: Enter the individual hours worked in the respective field in the **Hours** column and define the **Comments** field, as needed. Do this for all dates that you want to document your hours for.
  - To define multiple dates simultaneously: Enter the number of hours that you want to assign to multiple dates in the **Hours** field in the header of the editor. You can also define a comment in the **Comments** field. Pressing the CTRL key, click the relevant dates in the **Date** field that you want to copy the hour value and comment value to and click the **Copy to Selected Dates** button.
- 4) Click the **OK** button to save the time tracking definition or click **Cancel** to exit without saving. The **Status** column in the **Time Tracking** editor will display the value **Entered** once the time-track entry has been saved to the Alfabet database.

You can submit a timesheet containing any of the time-track entries displayed in the view with the status **Entered** or **Rejected**. To submit the time-track entries for approval:

- 1) Select one or more time-track entries with the status **Entered** or **Rejected** in the view and click **New > Submit Selected**, or click **New** and select one of the following:
  - **Submit Current Week:** Submit all days for which a time-track entry has been defined starting with the first day of the current week up to the current day.
  - **Submit Last Week:** Submit all days for which a time-track entry has been defined starting with the first day of the last week up to the last day of the last week.

- **Submit Current Month:** Submit all days for which a time-track entry has been defined starting with the first day of the current month up to the current day.
  - **Submit Last Month:** Submit all days for which a time-track entry has been defined starting with the first day of the last month up to the last day of the last month.
- 2) The status **Submitted** will be displayed for all time-track entries that were submitted. The approval of the timesheet bundling the submitted time-track entries can be tracked in the **My Timesheets** functionality.

## Approving the Timesheets That You Are Responsible For

The **Timesheet Approval** functionality allows you to approve or reject the timesheets that you are responsible.





The responsibility for timesheet approval will typically be configured by your enterprise. The capability to process and approve timesheets should be adapted to the timesheet approval process required in your enterprise via additional solution configuration. To this end, custom properties, custom editors/wizards can be configured by your solution designer for the object class `Timesheet` and workflows should be specified to ensure that your enterprise's regulations are complied with and its processes for timesheet approval are correctly carried out. For more information about the configuration of workflows, see the chapter in the reference manual *Configuring Alfabet with Alfabet Expand*.

To specify which timesheets are displayed in the view, define the following filter settings and click **Update**:

- **Start Date:** Select the start date for the period of timesheets that you would like to display.
- **End Date:** Select the end date for the period of timesheets that you would like to display.
- **Statuses:** Specify one or more statuses to display in the view. For example, to display all timesheets for the defined period that may be approved/rejected, select the status **Submitted**.

The dataset in the **Timesheet Approval** functionality is a grouped dataset with the timesheets displayed on the first level and their associated time-tracking entries displayed on the second level. The following information is displayed:

- **Name.** Displays the name of the user who has submitted the task followed by the name of the object that the task is associated with.
- **Status:** Displays the status of the timesheet. You can only approve or reject a timesheet that has the status **Submitted**.
- **Submission Date.** Displays the date that the timesheet was submitted for approval.
- **Approval Date.** Displays the date that the timesheet was approved.
- **Start Date:** Displays the start date of the timesheet. This is equivalent to the start date of the first time-track entry bundled in the timesheet.
- **End Date:** Displays the end date of the timesheet. This is equivalent to the end date of the last time-track entry bundled in the timesheet.

To approve a timesheet, select the timesheet in the view and click the **Approve**  button. To reject a timesheet, select the timesheet in the view and click the **Reject**  button.

## Managing Your Submitted Timesheets

The **My Timesheets** functionality displays all timesheets that have been submitted by the user responsible for working on the tasks. This view provides information about the status of each timesheet and allows the user to keep track of the submitted and approved timesheets. To specify which timesheets are displayed in the view, define the following filter settings and click **Update**:

- **Start Date:** Select the start date for the period of timesheets that you would like to display.
- **End Date:** Select the end date for the period of timesheets that you would like to display.
- **Statuses:** Specify one or more statuses to display in the view. For example, to display all timesheets for the defined period that have been rejected, select the status **Rejected**.

The following information is displayed:

- **Status:** Displays the status of the timesheet.
- **Submission Date.** Displays the date that the timesheet was submitted for approval.
- **Approval Date.** Displays the date that the timesheet was approved.
- **Start Date:** Displays the start date of the timesheet. This is equivalent to the start date of the first time-track entry bundled in the timesheet.
- **End Date:** Displays the end date of the timesheet. This is equivalent to the end date of the last time-track entry bundled in the timesheet.



## Chapter 8: Creating, Managing, and Accessing Your Bookmarks

Alfabet provides a bookmark capability that allows you to save links that allow you to quickly navigate to the relevant object or view that you want to work with. The bookmark can point to a page view, object profile (or object cockpit), report, or object selected in an explorer.



Please keep the following in mind when defining and accessing bookmarks:

- A bookmark created for an explorer is a reference to a position in an explorer. The explorer hierarchy is dynamically computed at runtime. If the structure of the explorer changes, the link may no longer be valid. For example, if new intermediary levels have been added to an explorer since the bookmark was created, the path saved for the bookmark will no longer be accurate and the bookmarked location may not be found.
  - Please note that some explorers and views cannot be bookmarked. For example, bookmarks cannot be created for functionalities used for administrative purposes that are available via an administrative user profile or configuration functionalities that are not associated with objects governed by access permissions. If the functionality or view may not be bookmarked, the **Create Bookmark** capability will be disabled.
  - The user profile that you are logged in with when you create the bookmark is the user profile used to initially open the bookmark. Thus, if a bookmark is shared with other users via a storyboard, for example, then those users accessing an Alfabet functionality via the dashboard will access the functionality with the user profile associated with the bookmark implemented in the storyboard. For more information about working with storyboards, see the chapter [Working with Storyboards](#).
- [Creating a Bookmark](#)
  - [Accessing Your Bookmarks](#)
  - [Managing and Structuring Your Bookmarks in Bookmark Folders](#)

### Creating a Bookmark

You can create a bookmark for an object profile, object cockpit, page view, configured report, or an object selected in an explorer. Multiple bookmarks can be created for standard views, configured reports, object profiles, and object cockpits can be saved to bookmarks, thus allowing bookmarks to be created for standard views and configured reports with different filter settings. When a bookmark is created, a new menu item such as **Bookmarks for Current Page View** or **Bookmarks for Current Report** will be added to the **Bookmark** menu. All bookmarks created for the selected view will be added to the new menu item.

Please note that some explorers and views cannot be bookmarked. For example, bookmarks cannot be created for functionalities used for administrative purposes that are available via an administrative user profile or configuration functionalities that are not associated with objects governed by access permissions. If the functionality or view may not be bookmarked, the **Create Bookmark** capability will be disabled.



Furthermore, your solution designer may configure that specific object profiles/object cockpits, page views, and configured reports may not be bookmarked. For more information, see the chapter *Configuring Object Views*.

To create a bookmark and add it to your collection of bookmarks:

- 1) Go to the location in Alfabet that you want to bookmark.
- 2) In the toolbar in the upper-right corner of the user interface, click **Bookmarks > Create Bookmark**.



If you are defining a bookmark to an explorer, you must first specify whether the bookmark you are creating should point to the object selected in the explorer or the view that is currently open in the workspace area. Please keep the following in mind:

- Select **Create Bookmark to Target View** to define a bookmark that links to the object profile (or object cockpit), page view, or configured report of the object currently selected in the explorer. When the user accesses the bookmark, the view will be displayed in the screen. Please note that if an object cockpit is defined, the bookmark link will open the object cockpit rather than the object profile. If no object cockpit is defined, the bookmark link will open the object profile.
- Select **Create Bookmark to Target Explorer** to define a bookmark that links to the selected object in the explorer. When the user accesses the bookmark, the explorer will be expanded and the selected explorer node will be highlighted. The object profile for the object selected in the explorer will be displayed in the workspace area.




A bookmark created for an explorer is a reference to a position in an explorer tree. The explorer is dynamically computed at runtime. If the structure of the tree changes, the link may no longer be valid. For example, if new intermediary levels have been added to an explorer since the bookmark was created, the path saved for the bookmark will no longer be accurate and the bookmarked location may not be found.

- 3) Define the following fields, as needed:
  - **Bookmark Name:** Enter a unique name of the bookmark. If you are creating multiple bookmarks with different filter settings for a view, the bookmark name should help the user understand the data that is displayed in the view.
  - **Bookmark Description:** Enter a meaningful description that will clarify the purpose of the bookmark. The text you define in the description field will be displayed as a tooltip for the bookmark icon in the desktop.
  - **Create in Bookmark Folder:** Select the bookmark folder where you want to store the bookmark. The bookmark will be available in its bookmark folder in the **Bookmark > Bookmarks** menu as well as in the **Bookmark Desktop** functionality. If you do not select a folder, the bookmark will be available directly on the highest level of the bookmark folder hierarchy. The bookmark can be assigned to a bookmark folder at any time. Bookmark folders are create in the **Bookmark Desktop** functionality. To create a folder structure for your bookmarks, see the section [Managing and Structuring Your Bookmarks in Bookmark Folders](#).
- 4) Click **OK** to save the bookmark. The bookmark is saved to the **Bookmark > Bookmarks** menu as well as in the **Bookmark Desktop** functionality.

## Accessing Your Bookmarks

Your bookmarks may be available in the **Bookmark > Bookmarks** menu as well as the **Bookmark Desktop** functionality. The availability of the **Bookmarks** menu is specified by your solution designer. For more information, see the section *Making the Bookmarks Menu Available to the User Community* in the reference manual *Configuring Alfabet with Alfabet Expand*.

To open access a bookmark and navigate to the targeted views:

- In the main toolbar in the Alfabet user interface, click **Bookmark > Bookmarks** and click the bookmark that you want to open. Please consider the following:
  - An arrow may be displayed next to each bookmark folder containing subordinate bookmarks and folders. The bookmarks are listed in alphabetical order.
  - Multiple bookmarks may be created for an object in an explorer or a standard view, configured report, object profile, or object cockpit. This allows you to create bookmarks with different filter settings for standard views and configured reports. When a bookmark is created, a sub-menu may display either **Bookmarks for Current Object**, **Bookmarks for Current Page View**, **Bookmarks for Current Report**, **Bookmarks for Current Object Cockpit**, or **Bookmarks for Current Object Profile**, depending on the view that is open in the user interface. All bookmarks available for the current object or view will be displayed in the sub-menu.
  - The display of the bookmark folder hierarchy as well as the sub-menus such as **Bookmarks for Current Object**, etc. in the **Bookmark** menu is configured in the GUI scheme settings available for your user profile. For more information, see the section *Configuring GUI Scheme Definitions for the Alfabet Interface* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- In the main toolbar in the Alfabet user interface, click **Bookmark > Show Bookmark Desktop**. In the **Bookmark Desktop** functionality, click the bookmark and click the **Navigate**  button.

## Managing and Structuring Your Bookmarks in Bookmark Folders

The **Bookmark Desktop** allows you to organize and structure your bookmarks so that you can easily and efficiently access the objects and views that you regularly work with.

When you create the view, you can define a name and provide descriptive text that provides essential information about the bookmark. The bookmark will be saved to the **Bookmark Desktop**. You will find all of your bookmarks in the **Bookmark Desktop**, where you can organize and structure your bookmarks in folders.

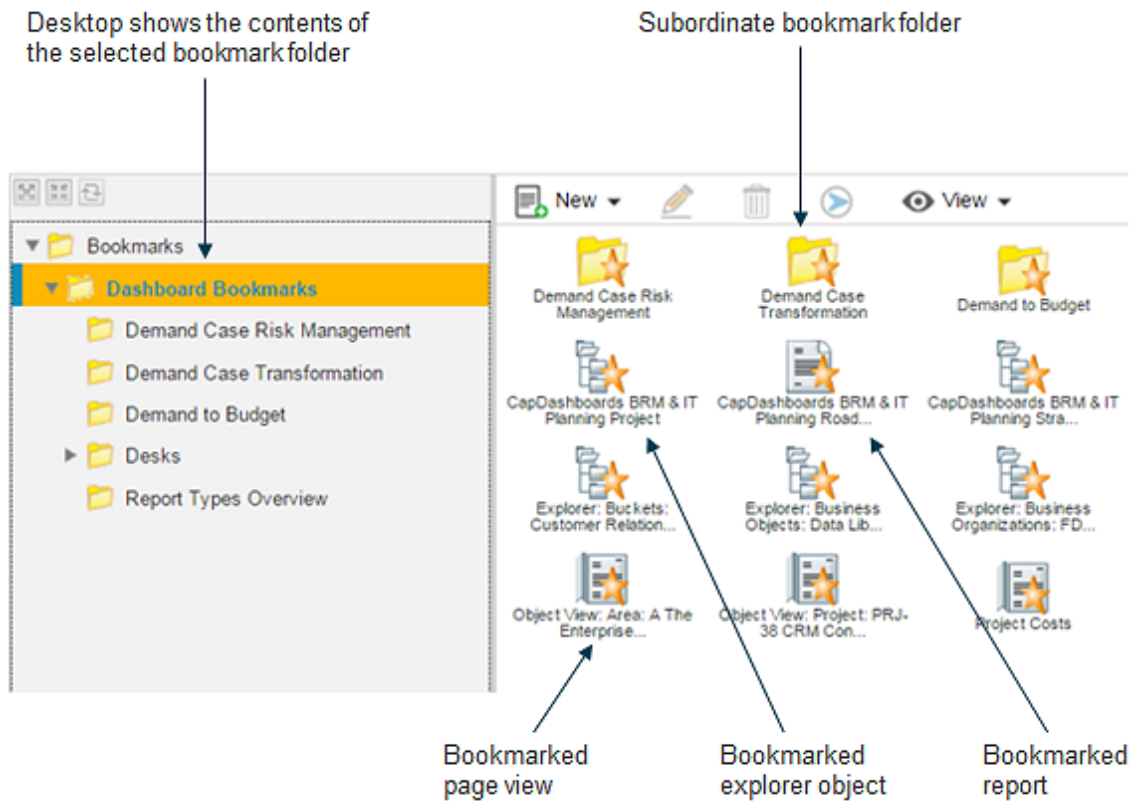
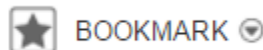


FIGURE: Bookmark icons are displayed in the Bookmark Desktop functionality



To open the **Bookmark Desktop**, click the **BOOKMARK** button and select **Show Bookmarks** in the Alfabet toolbar. The **Bookmarks** explorer displays the hierarchy of bookmark folders and sub-folders. Click the **Bookmarks** root node to display the bookmark folders at the top level of the hierarchy or click any folder in the explorer to display its contents.

To switch between a desktop view with icons of the bookmarks and a table listing the bookmarks:




- Select **View > As Icons** to display the bookmarks as icons on the desktop. Point the mouse to a bookmark to display its description in a tooltip.
- Select **View > As List** to display the bookmarks in a table structure. The following columns will be displayed in the table:
  - **Bookmark/Folder Name:** Displays the name of the bookmark or bookmark folder.
  - **Type:** Displays the technical type of view that the bookmark points to. You may see any of the following:
    - **GraphicView:** This is a bookmark that references a standard page view.
    - **Report:** This is a bookmark that references a configured report.
    - **ObjectView:** This is a bookmark that references an object profile.
    - **Explorer:** This is a bookmark that references an object within an explorer.
  - **Creation Date:** Displays the date that the bookmark was created.

- **Description:** Displays the comment defined about the bookmark.



You can define a default view for the **Bookmark Desktop** in your user settings. There you can specify whether the bookmarks and bookmark folders are displayed as icons or in a table. For more information, see the section [Defining Your User Settings in Alfabet](#).

You can create bookmark folders in which you can structure and organize your bookmarks in the **Bookmark Desktop**. The bookmark folders will be added to the **Bookmarks** explorer. When you click a bookmark folder in the explorer, you will see the bookmarks listed in the table or displayed as icons on the desktop. A bookmark may only be assigned to one folder.

- To create a bookmark folder, click **New > Create New Bookmark Folder** and enter a name and description for the bookmark. The description will be displayed as a tooltip when you mouse-over the bookmark folder icon in the desktop.
- To assign a bookmark to a bookmark folder, select the bookmark and click **Restructure > Cut** and click the folder in the explorer you want to add it to and click **Restructure > Paste**. A bookmark can only be assigned to one folder.
- To open the view targeted by the bookmark, click the bookmark and click the **Navigate**  button.
- To understand if a bookmark is implemented in a storyboard, select the bookmark and click **Show Bookmark Usage**. A message will be displayed listing the storyboards that the bookmark is assigned to.
- To edit an existing bookmark folder, select the bookmark folder and click the **Edit**  button. You will see the editor in which you can edit the object.
- To delete an existing bookmark folder, select the bookmark folder and click the **Delete**  button. The bookmark folder will be irrevocably deleted from the database. Any bookmarks assigned to the deleted bookmark folder will be returned to the top node of the **Bookmarks** explorer and can be reassigned to another bookmark folder, as needed. You can only delete one bookmark at a time. Multiple selection and deletion is not supported in the **Bookmark Desktop**.



Please keep the following in mind when defining and accessing bookmarks:

- A bookmark created for an explorer is a reference to a position in an explorer. The explorer hierarchy is dynamically computed at runtime. If the structure of the explorer changes, the link may no longer be valid. For example, if new intermediary levels have been added to an explorer since the bookmark was created, the path saved for the bookmark will no longer be accurate and the bookmarked location may not be found.
- Please note that some explorers and views cannot be bookmarked. For example, bookmarks cannot be created for functionalities used for administrative purposes that are available via an administrative user profile or configuration functionalities that are not associated with objects governed by access permissions. If the functionality or view may not be bookmarked, the **Create Bookmark** capability will be disabled.
- The user profile that you are logged in with when you create the bookmark is the user profile used to initially open the bookmark. Thus, if a bookmark is shared with other users via a storyboard, for example, then those users accessing an Alfabet functionality via the dashboard will access the functionality with the user profile associated with the bookmark.

implemented in the storyboard. For more information about working with storyboards, see the chapter [Working with Storyboards](#).

## Chapter 9: Communicating and Collaborating with Your Colleagues in Alfabet

A variety of functionalities are available in Alfabet that allow you to communicate with your colleagues about the objects in your inventory.

- Interoperability with Skype for Business Server® is available in order to support video calls and video chats between users in the Alfabet user community. If interoperability with Skype for Business Server® is configured for your enterprise and Skype is permissible for a user, a Skype icon will be displayed next to the user's name in the **Attributes** section of object profiles/object cockpits as well as previews, allowing the user to contact the authorized user of an object should questions arise.
- An express view allows you to share the most up-to-date information about your enterprise architecture with colleagues who may or may not be part of the user community, thus supporting communication among those people in your enterprise for whom the Alfabet data is most relevant. An express view is a link to a specific Alfabet view or explorer displaying data that allows individuals inside or outside of the Alfabet user community to view Alfabet information. When the express view is created, an email notification is automatically mailed to the specified recipient who receives a URL that allows him/her to access the current page view in Alfabet.
- A collaboration capability is available that supports a free-form exchange of information and ideas about objects or views in Alfabet by members of the user community. The capability supports the exchange of user-generated content as is common in social media. A collaboration topic can be created for an object in an object profile/object cockpit or a specific page view and all invited users can add a post to the collaboration topic.
- The collaboration capability can optionally be configured to integrate with Microsoft Teams. Depending on the configuration, an Alfabet user can open a predefined Microsoft Teams channel or create a new Microsoft Teams channel for an Alfabet object in the **Collaboration Panel** in the object profile of the relevant object and specify the initial set of users that may collaborate about the object. Additional users with a Microsoft Teams ID can be added to the discussion at any time with the Microsoft Teams client. Posts about the object that are made in Alfabet will be displayed in Microsoft Teams and likewise posts made in Microsoft Teams about the Alfabet object will be displayed in the **Collaboration Panel** in the object profile of the relevant object. In this way, users can reply to each other's posts from both Microsoft Teams and the Alfabet user interface.

Furthermore, the online status of an Alfabet user with Microsoft Teams ID will be displayed next to the user's name in the **Attributes** section of previews, object profiles, and object cockpits. Users can click the online status icon and open the Microsoft Teams chat. Please note that it is not possible to configure both integration with Microsoft Teams and Skype in parallel.

- A discussion functionality supports collaborative discussions about objects in the enterprise. A discussion can be initiated for a selected object by an authorized user who is responsible for the object. Any user that has been configured to be a participant in a discussion group may contribute to a discussion. All users with authorized access to the object as well as members of the managing discussion group and invited discussion groups may contribute to and track the ongoing discussion about the object. Discussion participants may add comments, define the status of the discussion, and trigger email notification for other discussion participants informing them about the contribution.

The following information is available:

- [Skyping with Your Colleagues](#)

- [Sending and Receiving Express Views](#)
- [Communicating with Your Colleagues via the Alfabet Internal Collaboration Functionality](#)
  - [Creating a Collaboration Topic](#)
  - [Accessing and Participating in the Collaboration Topics You Have Been Invited To](#)
    - [Posting a Message to a Collaboration Topic](#)
    - [Defining a Bookmark for a Collaboration Topic](#)
    - [Attaching a Document to a Collaboration Topic](#)
    - [Inviting Users to Participate in a Collaboration Topic](#)
    - [Exporting the Collaboration Topic as an HTML File](#)
- [Communicating with your Colleagues Using Integration with Microsoft Teams](#)
  - [Initiating Microsoft Teams Integration](#)
  - [Contacting a Single User via Microsoft Teams Chat](#)
  - [Discussing with Colleagues About an Object in Alfabet and Microsoft Teams](#)
    - [Accessing the Collaboration Panel in Alfabet](#)
    - [Starting a New Teams Channel for an Object in Alfabet](#)
    - [Contributing to an Existing Chat in Alfabet](#)
    - [Inviting Users to Participate in a Chat](#)
    - [Opening the Chat in Microsoft Teams from the Collaboration Panel](#)
    - [Viewing and Accessing All Microsoft Teams Chats You are Involved in](#)
    - [Adding a Link to a Document in Microsoft Teams to an Object](#)
    - [Ending a Chat](#)
  - [Managing and Scheduling Microsoft Teams Meetings in Alfabet](#)
    - [Scheduling a Microsoft Teams Meeting about an Object](#)
    - [Importing a Microsoft Teams Meeting](#)
- [Initiating, Contributing to, and Managing a Discussion About Objects](#)
  - [Understanding the Discussion Process](#)
  - [Initiating a Discussion about an Object](#)
  - [Managing and Contributing to the Discussion](#)
    - [Inviting Other Discussion Groups to Join the Discussion](#)
    - [Contributing to the Discussion](#)
    - [Editing the Object Under Discussion](#)



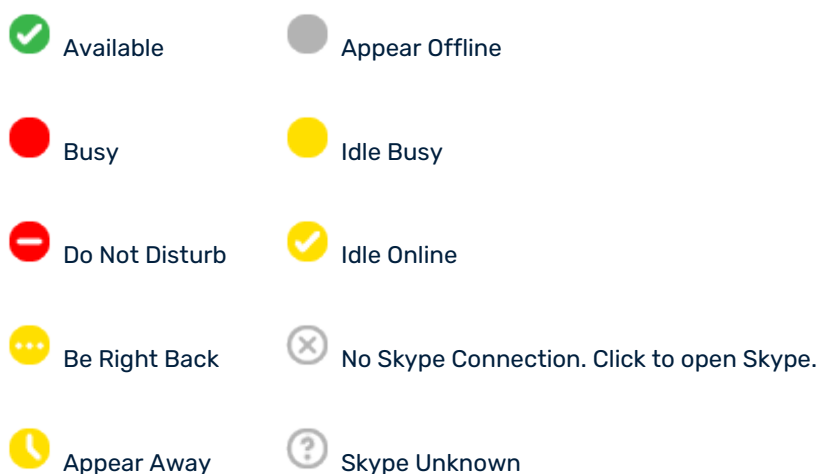
- [Closing the Discussion for a Discussion Group](#)

## Skyping with Your Colleagues

Interoperability with Skype for Business Server® is available in order to support video calls and video chats between users in the Alfabet user community, thus allowing a user to contact the authorized user of an object from within Alfabet should questions arise.

If interoperability with Skype for Business Server® is configured for your enterprise and Skype is permissible for a user, a Skype status symbol will be displayed next to the user's name in the **Attributes** section of object profiles/object cockpits as well as previews indicating their current Skype status. The user can click the Skype status icon to open the Skype screen, allowing the user to contact the authorized user of an object should questions arise.

You may see any of the following symbols:



The following is required in order to use the Skype capability in the context of the Alfabet user interface:

- Integration with Microsoft Teams must not be configured for Alfabet. Integration with Microsoft Teams supersedes integration with Skype and your Skype integration configuration will be ignored if an active Microsoft Teams integration configuration is available.
- Integration with Skype for Business Server must be configured for your enterprise. For more information, see the section *Configuring Interoperability with Skype for Business Server®* in the reference manual *API Integration with Third-Party Components*.
- The Skype ID and Skype domain must be defined for the user. This can be defined via the **Personal Info** option in the < **Alfabet User** > menu or by a user administrator in the **Users Administration** functionality. For more information about specifying your user information via the **Personal Info** option, see the section [Defining Your User Information](#). For more information, see the section *Creating a User* in the reference manual *User and Solution Administration*.
- Please note that the contact status must be selected to be displayed for the user in the Contacts List section of the Skype for Business - Options editor in the Skype for Business application. If the contact status is not enabled in the Skype for Business application, the skype presence status will not be displayed for the user in Alfabet.

## Sending and Receiving Express Views

An express view allows you to share the most up-to-date information about your enterprise architecture with colleagues who may or may not be part of the user community, thus supporting communication among those people in your enterprise for whom the Alfabet data is most relevant.

An express view is a link to a specific Alfabet view or explorer displaying data that allows individuals inside or outside of the Alfabet user community to view Alfabet information. When the express view is created, an email notification is automatically mailed to the specified recipient who receives a URL that allows him/her to access the current page view in Alfabet.

When a user clicks the hyperlink to the targeted view in the email notification, the user profile used to access Alfabet is by default the user profile that the sender of the express view was logged in with when he/she created the express view. However, your system administrator can configure the express view capability so that the recipient's user profile is used to open the express view instead of the sender's user profile. For more information about the configuration of express views, see the section *Configuring the Express View (Email) Capability* in the reference manual *System Administration*.



If an express view is created for an object that is governed by a mandate and the express view is assigned to a user who is defined by your user administrator as an anonymous user, the user will not be able to access the view in Alfabet. Users defined as anonymous users may only access objects via express views that are not governed by a mandate.

User profiles that are marked as administrative user profile will grant administrative access permissions even when opened via an express view. Mandate settings are not taken into account for views opening via an express view link with an administrative user profile. If the express view functionality is configured to use the sender's user profile to display the express view, you should avoid to send express views while working in an administrative user profile.

Express views cannot be created for some explorers and views. For example, explorer root nodes as well as all functionalities used for administrative purposes that are available via an administrative user profile as well as the **Configuration** functionalities in the Alfabet user interface that are not associated with objects governed by access permissions do not allow express views to be created. In this case, the functionality to create an express view will be disabled.

You can send an express view via your email client for any Alfabet view if the **Mail Express View** option is available in the **Bookmark** menu in the main toolbar. When the recipient of the email clicks the hyperlink in the email, Alfabet will open and the user will have ReadOnly access to the view.

To email an express view to another person:

- 1) Go to the view in Alfabet for which you want to create an express view.
- 2) In the upper-left corner of the toolbar, click **Bookmark > Mail Express View** in the main toolbar. A dialog box opens.
- 3) To send the express view, you can do either of the following:
  - Click the hyperlink available for the view or, if relevant, explorer in order to open your email program with the link automatically pasted in the email notification. Additional text can be written in the email, as needed.
  - Copy the URL and paste it in your email program.
- 4) Send the email from your email client.
- 5) Click **Close** to close the dialog box in Alfabet.

## Communicating with Your Colleagues via the Alfabet Internal Collaboration Functionality


A collaboration capability is available that supports a free-form exchange of information and ideas about objects or views in Alfabet by members of the user community. The capability supports the exchange of user-generated content as is common in social media. A collaboration topic can be created for an object in an object profile/object cockpit or a specific page view and all invited users can add a post to the collaboration topic. Any user with ReadOnly and ReadWrite access permissions to the object view or page view can start a collaboration topic.

The collaboration topic will automatically be linked to the relevant object view or page view. The user initiating the collaboration can invite other users to join the discussion, and these invited users can also invite other users to the collaboration topic. Bookmarks and attached documents can be associated with a collaboration topic and will be accessible to all users invited to the collaboration. Keyword tags can be defined for a collaboration topic in order to search for the collaboration. Users can access all collaboration topics that they have been invited to in the collaboration functionality. The collaboration topic including all posts by all users can be downloaded as an HTML file.



If the object that the collaboration topic targets is deleted, the collaboration will not be deleted. The hyperlink to the original object view or page view will open but no data will be displayed.




It is possible that the collaboration functionality is disabled in your Alfabet solution. In this case, the **Show Collaboration Panel**  button will not be displayed in the toolbar in object views and page views. You can enable the collaboration capability by selecting the checkbox for the **Collaboration** field in your user settings. For more information, see the section [Defining Your User Settings in Alfabet](#). Please note that the collaboration functionality may be disabled by your system administrator via the server alias setting for all users in the user community. For more information, see the reference manual *System Administration*.

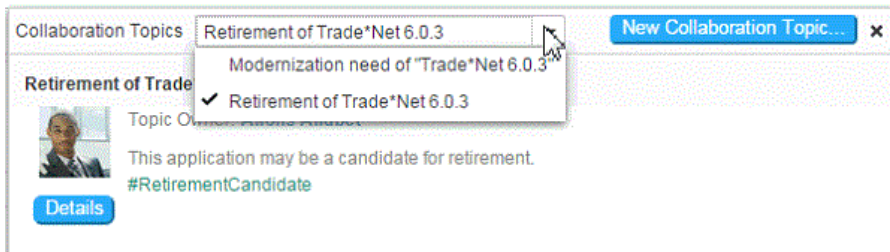
If your company configured Alfabet to integrate with Microsoft Teams, the Microsoft Teams integration will substitute the internal collaboration capability. For information about working with the collaboration capability integrated with Microsoft Teams, see [Communicating with your Colleagues Using Integration with Microsoft Teams](#).

The following information is available:

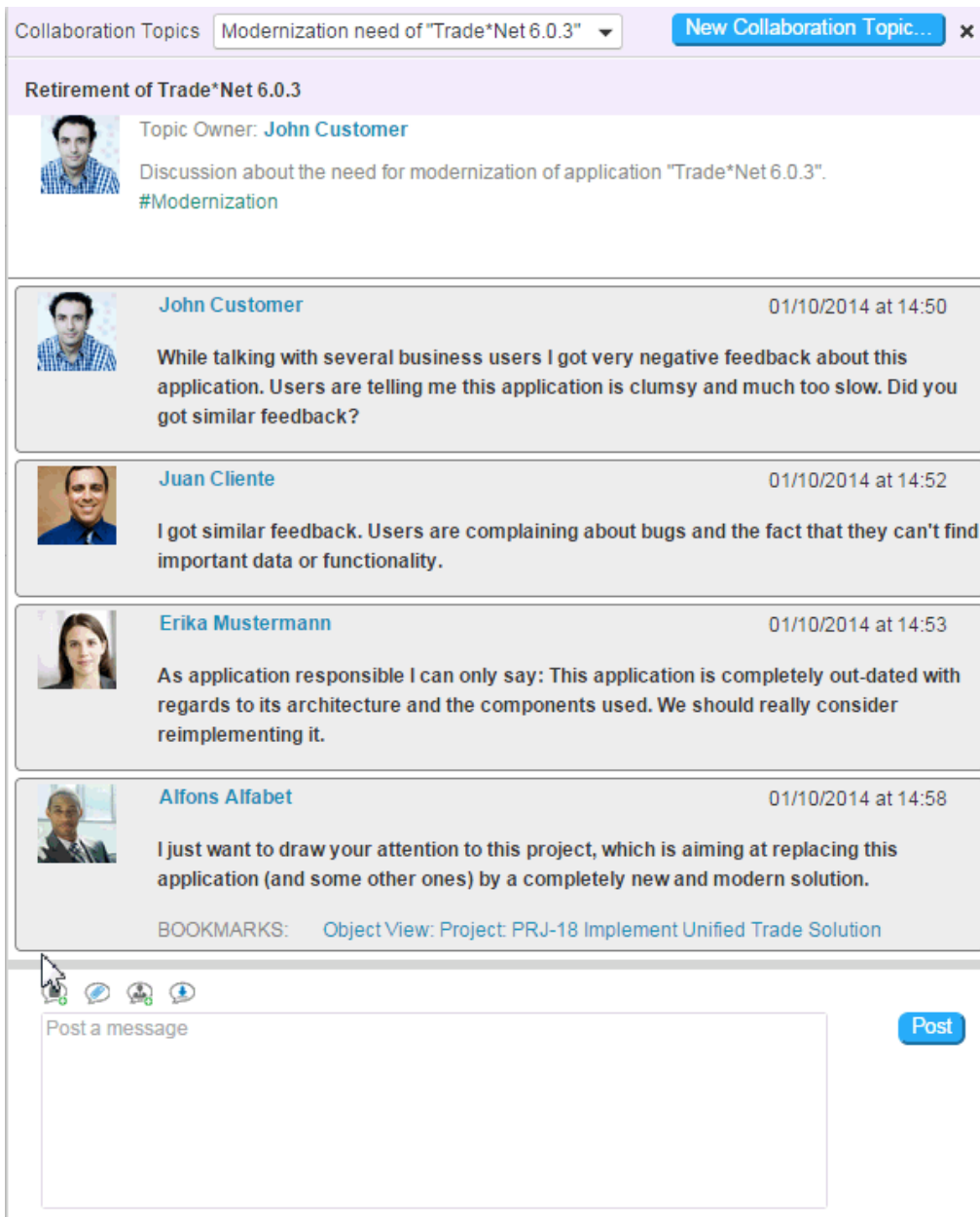
- [Creating a Collaboration Topic](#)
- [Accessing and Participating in the Collaboration Topics You Have Been Invited To](#)
  - [Posting a Message to a Collaboration Topic](#)
  - [Defining a Bookmark for a Collaboration Topic](#)
  - [Attaching a Document to a Collaboration Topic](#)
  - [Inviting Users to Participate in a Collaboration Topic](#)
  - [Exporting the Collaboration Topic as an HTML File](#)

## Creating a Collaboration Topic

A collaboration topic is created via the **Show Collaboration Panel**  button which is available in the toolbar in standard page views and objects views. The **Collaboration Panel** displays all collaboration topics for the view. If no collaboration topic exists, the panel will be empty.



All existing posts will be displayed for the selected collaboration topic.



Any user with ReadOnly and ReadWrite access permissions to an object view or page view can start a collaboration topic.



If a federated architecture is implemented in the enterprise, then mandate definitions for objects are also applied to the collaboration topics. If a user creating a new collaboration topic is currently logged in with a mandate, the collaboration topics will only be visible to users with the same mandate regardless of whether they have been invited to participate in the collaboration.

To create a new collaboration topic, click the **New Collaboration Topic** button. In the **Collaboration Topic** editor, define the following fields, as needed:

- **Title:** Enter a new name for the collaboration topic, if necessary. The default name is based on the syntax: <ViewType>:<ObjectClass>:<ObjectName>.
- **Description:** Enter a description of the collaboration topic. This will be the first post in the collaboration.
- **Tags:** Enter keywords to search for the collaboration topic. If you want to add multiple tags, enter each tag on a separate line. When you close the editor, each tag will automatically be preceded by a hashmark (#). Tags can be used to search for collaboration topics via the **Search by Tags** filter in the **Collaboration** functionality. Users must enter the correct spelling as defined in the **Tags** attribute.
- **Invited Users:** Click the **Add Users** button to invite one or more users to the collaboration topic. You can remove users by selecting the user in the pane and clicking the **Remove** button. To export a list of all invited users including their defined email addresses and telephone numbers, click the **Export** button.


Click **OK** to save the new collaboration topic. When the editor is closed, you will see the new collaboration topic in the collaboration panel. Invited users can view the topic and post a message via the **Collaboration** functionality. For more information, see the section [Posting a Message to a Collaboration Topic](#).

## Accessing and Participating in the Collaboration Topics You Have Been Invited To

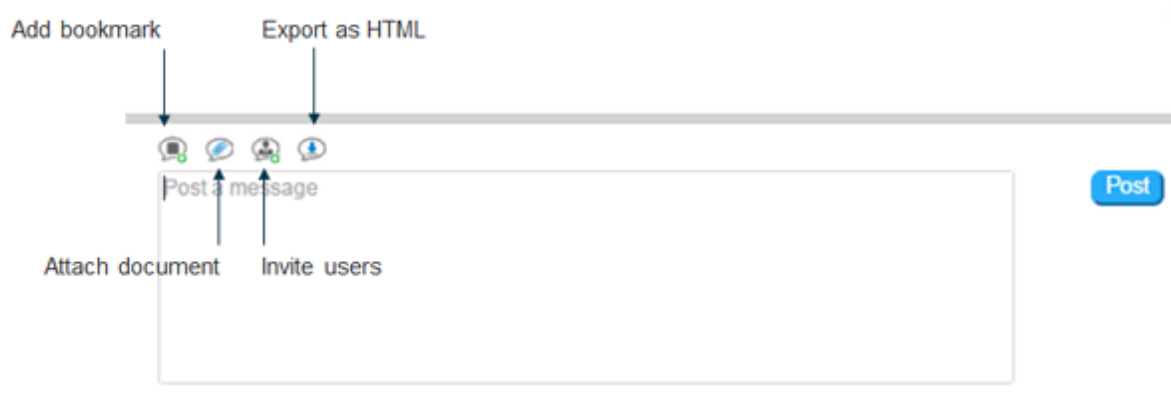
All collaboration topics that you have been invited to are displayed in the **My Collaboration Topics** functionality. Here you can view the collaboration topics and see all posts that have been made for the topic. You can post a message for a collaboration topic, define bookmarks to other views and attach documents that are relevant to the collaboration topic, and invite other users to participate in the collaboration topic. The collaboration topic including all posts by all users can be downloaded as an HTML file.

The **Collaboration Topics Explorer** displays all collaboration topics that you have started and that you have been invited to. Click the **Collaboration Topics Explorer** node and click **Collaboration > New Collaboration Topic** in the toolbar to create a new collaboration topic. For details about creating a new collaboration topic, see the section [Creating a Collaboration Topic](#).

To search existing collaboration topics based on keyword tags, click the **Collaboration Topics Explorer** node and enter a keyword in the **Search by Tag** filter and click **Search**. You must spell the keyword correctly. All collaboration topics that match the search criteria are displayed in the table.

To view all posts that have been made for a collaboration topic, click the collaboration topic  in the **Collaboration Topics Explorer**. The collaboration topic and all posts are displayed in the view on the right. If you are the topic owner of the collaboration topic, a **Details** button will be displayed in the topic entry. You can click the **Details** button to open the **Collaboration** editor and modify the name, description, and tags defined for the collaboration topic. The **Details** button will not be displayed if you are not the topic owner.

Each collaboration post displays the user who has made the contribution to the collaboration topic, the message they have posted, the date and time of their post, and possible hyperlinks for bookmarks or documents. Blue fonts are hyperlinks that you can click to access relevant information. Tags are displayed in green font. In the bottom section of the view, you can post a new message, add a bookmark or document, invite other users to the collaboration topic, and export the collaboration topic and all posts to an HTML page.



The following information is available:

- [Posting a Message to a Collaboration Topic](#)
- [Defining a Bookmark for a Collaboration Topic](#)
- [Attaching a Document to a Collaboration Topic](#)
- [Inviting Users to Participate in a Collaboration Topic](#)
- [Exporting the Collaboration Topic as an HTML File](#)

### Posting a Message to a Collaboration Topic

Any user invited to a collaboration topic can post a message for the topic. To post a message, click the collaboration topic in the **Collaboration Topics Explorer**. Click in the pane at the bottom of the screen displaying the text **Post a message**, enter your message, and click the **Post** button. The message is displayed as the most recent post to the collaboration topic.


### Defining a Bookmark for a Collaboration Topic

In order to provide additional information relevant to the collaboration topic, you can add a bookmark pointing to another view. You can either add an existing bookmark or create a new bookmark for the

collaboration topic. If you need to create a new bookmark, you can open a different browser tab, create the bookmark, and assign the bookmark to the collaboration topic in the original browser tab. The creation of bookmarks is described in detail in the section [Creating, Managing, and Accessing Your Bookmarks](#).

The bookmark will be displayed as a hyperlink in the post for the collaboration topic. Any user invited to the collaboration topic can click the hyperlink to access the bookmark. A bookmark will be displayed using the interface language that it was created with. Any user can change the language of the bookmarked view by means of the language button in the upper-right corner of the user interface.

To add a bookmark to the collaboration topic:


- 1) In the **Collaboration Topics Explorer**, click the **Add Reference**  button in the toolbar of the pane at the bottom of the screen.
- 2) In the object selector, select the bookmark in either the **Simple** tab or the **Browse** tab if the bookmark is structured in a bookmark group. Click **OK**.
- 3) The bookmark is displayed to the right of the message box. You must enter text in the **Post a message** field and click the **Post** button to add the bookmark to the collaboration topic. Click the X next to the bookmark if you want to remove it from the collaboration topic.

### Attaching a Document to a Collaboration Topic

You can attach a document stored in the **Internal Document Selector** to the collaboration topic in order to provide necessary content to the discussion. For more information about uploading a document to the document, see the section *Uploading Documents and Managing User Permissions to Document Folders in the Internal Document Selector* in the reference manual *User and Solution Administration*.

The document will be displayed as a hyperlink in the post for the collaboration topic. Any user invited to the collaboration topic can click the hyperlink to access the document.

To attach a document to the collaboration topic:


- 1) In the **Collaboration Topics Explorer**, click the **Add Document**  button in the toolbar of the pane at the bottom of the screen.
- 2) In the internal document selector, select the document and click **OK**.
- 3) The document is displayed to the right of the message box. You must enter text in the **Post a message** field and click the **Post** button to add the document to the collaboration topic. Click the X next to the document if you want to remove it from the collaboration topic.

### Inviting Users to Participate in a Collaboration Topic


As a participant in a collaboration topic, you can invite one or more users to the collaboration topic. Invited users can view the topic and post a message via the **Collaboration** functionality.



If a federated architecture is implemented in the enterprise, then mandate definitions for objects are also applied to the collaboration topics. If a user creating a new collaboration topic is currently logged in with a mandate, the collaboration topics will only be visible to users with the same mandate regardless of whether they have been invited to participate in the collaboration.

- 1) In the **Collaboration Topics Explorer**, click the **Add Users**  button in the toolbar of the pane at the bottom of the screen.
- 2) In the person selector, select the user(s) and click **OK**.
- 3) The new users are displayed to the right of the message box. You must enter text in the **Post a message** field and click the **Post** button to add the users to the collaboration topic. Click the X next to the user if you want to remove him/her from the collaboration topic.

### Exporting the Collaboration Topic as an HTML File

The collaboration topic including all posts by all users can be downloaded as an HTML file. In the **Collaboration Topics Explorer**, click the **Download Collaboration Content**  button in the toolbar of the pane at the bottom of the screen. In the dialog, click the **Download** button and save the HTML file to your computer. The HTML file can be opened in your browser.

## Communicating with your Colleagues Using Integration with Microsoft Teams

This functionality is only available if your company has configured and activated integration with Microsoft Teams®. For information about the required configuration, see *Configuring Interoperability with Microsoft Teams* in the reference manual *API Integration with Third-Party Components*.

Integration with Microsoft Teams provides the following functionality:

- The status of the user in Microsoft Teams is visible in Alfabet behind the user name in the **Attribute** section in object profiles and object cockpits. Users can click the status icon to open Microsoft Teams and chat with the colleague who's status is displayed.
- Conversations about Alfabet objects can be started via the Alfabet user interface.
- A link to files attached to a team in Microsoft Teams about an Alfabet object can be attached to that object in the **Attachments** page view.
- Microsoft Teams meetings with relevant Alfabet users can be scheduled via the Alfabet user interface.
- [Initiating Microsoft Teams Integration](#)
- [Contacting a Single User via Microsoft Teams Chat](#)
- [Discussing with Colleagues About an Object in Alfabet and Microsoft Teams](#)
  - [Accessing the Collaboration Panel in Alfabet](#)
  - [Starting a New Teams Channel for an Object in Alfabet](#)
  - [Contributing to an Existing Chat in Alfabet](#)
  - [Inviting Users to Participate in a Chat](#)
  - [Opening the Chat in Microsoft Teams from the Collaboration Panel](#)



- [Viewing and Accessing All Microsoft Teams Chats You are Involved in](#)
- [Adding a Link to a Document in Microsoft Teams to an Object](#)
- [Ending a Chat](#)
- [Managing and Scheduling Microsoft Teams Meetings in Alfabet](#)
  - [Scheduling a Microsoft Teams Meeting about an Object](#)
  - [Importing a Microsoft Teams Meeting](#)
    - [Managing Your Scheduled Microsoft Teams Meetings](#)

## Initiating Microsoft Teams Integration

Microsoft Teams integration requires login of the user to Microsoft Teams in the background. The required user login name is usually added to the user configuration by a user or system administrator. You will then be logged in automatically to Microsoft Teams on login to Alfabet. If you are not automatically logged in, you may need to manually establish the connection.

To manually establish the connection if you have never used Microsoft Teams integration before:

- 1) Click the **<Alfabet User Name>** menu and select **Personal Info**.
- 2) Make sure that your Microsoft Teams user name is specified in the field **MS Teams User Name**.
- 3) Click **OK** to close the editor.
- 4) Click the **<Alfabet User Name>** menu and select **Request MS Teams Authorization Code**. Log in to Microsoft Teams with your user name and password in the new browser tab that opens.

If the connection to Microsoft Teams fails during your Alfabet session:

- 1) Click the **<Alfabet User Name>** menu and select **Request MS Teams Authorization Code**. Log in to Microsoft Teams with your user name and password in the new browser tab that opens.



An exclamation mark will be displayed in front of the **Request MS Teams Authorization Code** option if the authorization code is no longer valid.

## Contacting a Single User via Microsoft Teams Chat

The status of a user in Microsoft Teams is displayed next to the user's name in the **Attributes** section of object profiles/object cockpits as well as previews. The symbol displaying the status in Alfabet is identical with the symbol displayed in Microsoft Teams.

Authorized User

Customer John 


The status will be regularly updated as configured. Depending on the interval to update, changes in Microsoft Teams may be displayed with a delay in Alfabet.

You can click the status icon behind a user name to open Microsoft Teams. Microsoft Teams will open with a chat window to chat with the selected user.

## Discussing with Colleagues About an Object in Alfabet and Microsoft Teams

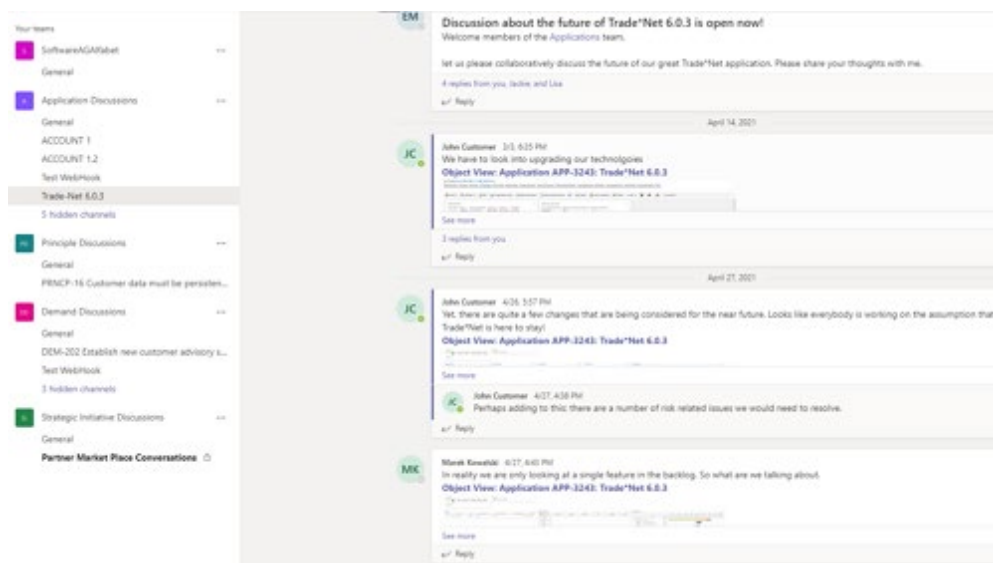
Users can start a conversation about an object in Alfabet that will then also be available in Microsoft Teams. The conversation will be synchronized between both applications:

- In Alfabet, a collaboration panel can be opened for objects of all object classes that are configured by your company to provide a collaboration capability. The collaboration panel is accessible via the

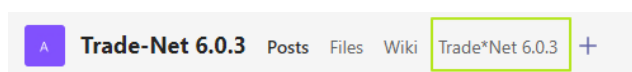
**Show Collaboration Panel** menu option of the **Microsoft Teams Interactions**  button in the toolbar of the object profile and object cockpits of an object and in page views opened for a base object. If the button is opened from a page view, the collaboration channel will open for the conversation related to the base object. The structure of messages is similar to those in teams channels in Microsoft Teams so that both a new conversation or a reply to an existing conversation can be posted.



- A conversation about an object started in Alfabet is synchronized with a defined channel in Microsoft Teams. The channel shows the same content as the collaboration panel in Alfabet.



If the integration solution with Microsoft Teams is configured to provide a back link to the object in Alfabet, a tab with the name of the object will be available in the team channel. The user can open the tab to view current information about the object in an Alfabet view.



Content added in Alfabet will be visible in Microsoft Teams and vice versa and options for opening Microsoft Teams directly from the Alfabet user interface and for opening the Alfabet user interface from Microsoft Teams are provided.

A conversation about an object in Alfabet can only be synchronized with a single team channel in Microsoft Teams, while multiple chats about different Alfabet objects can be synchronized with the same team channel in Microsoft Teams. You can combine the chat about multiple objects in one team channel. The same conversation is then displayed in the collaboration panel of all of the objects assigned to the team channel in Microsoft Teams.

The following information is available about having a conversation about an object both in Alfabet and Microsoft Teams:

- [Accessing the Collaboration Panel in Alfabet](#)
- [Starting a New Teams Channel for an Object in Alfabet](#)
- [Contributing to an Existing Chat in Alfabet](#)
- [Inviting Users to Participate in a Chat](#)
- [Opening the Chat in Microsoft Teams from the Collaboration Panel](#)
- [Viewing and Accessing All Microsoft Teams Chats You are Involved in](#)
- [Adding a Link to a Document in Microsoft Teams to an Object](#)
- [Ending a Chat](#)


## Accessing the Collaboration Panel in Alfabet

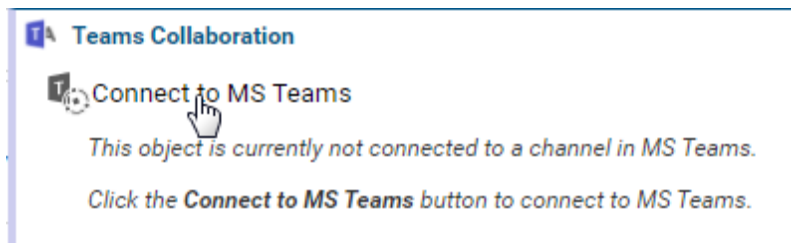
The ability to start a conversation about an object in Microsoft Teams is restricted to the subset of object classes that have been configured by your solution designer. The button for opening the collaboration panel will only be available if a conversation can be started. The button is visible in the object profile and object cockpits for the object as well as in all views that the object is the base object for. For example, in the **Applications** view of an application group the button will open the collaboration panel for the application group you are currently working with.



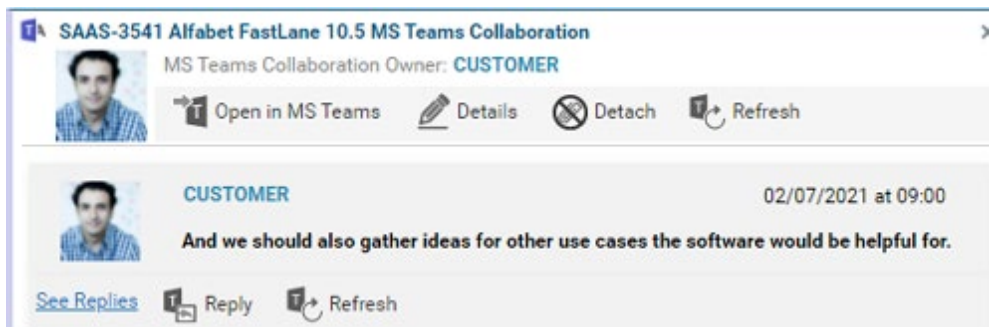
Prior to accessing the collaboration panel, make sure that you are currently logged in to Microsoft Teams.

To open the collaboration panel:

- 1) In the toolbar, select **Microsoft Teams Interactions**  > **Show Collaboration Panel**.
- 2) The collaboration panel will open with one of the following options:




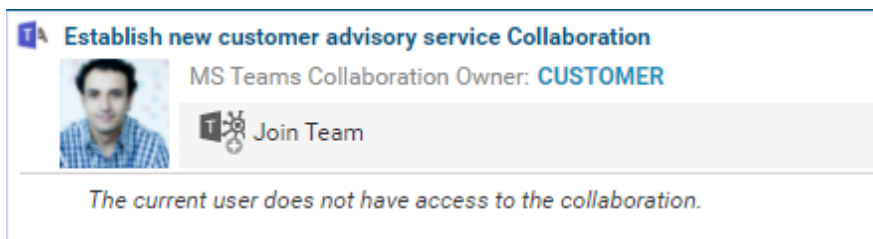
The object is not yet connected with a team channel in Microsoft Teams. In this case, you can connect the object to a teams channel to start a conversation. Follow the procedure described in the section [Starting a New Teams Channel for an Object in Alfabet](#).




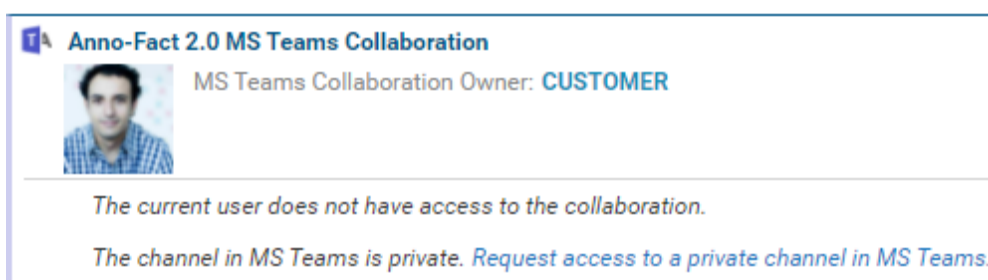
A conversation has already been started and the object is connected with a team channel in Microsoft Teams. You are a member of the team channel and can contribute to the discussion as described in the section [Contributing to an Existing Chat in Alfabet](#).



If you do not see any conversations, click the **Refresh**  button to load the team channel content from Microsoft Teams.



A conversation has already been started and the object is connected with a public team channel in a public team in Microsoft Teams. You are not a member of the team channel. Click the **Join Team**  button to join the team. You will be added as member to the team in Microsoft Teams and the conversation of the connected team channel will load into the collaboration panel. You can then contribute to the discussion as described in the section [Contributing to an Existing Chat in Alfabet](#)

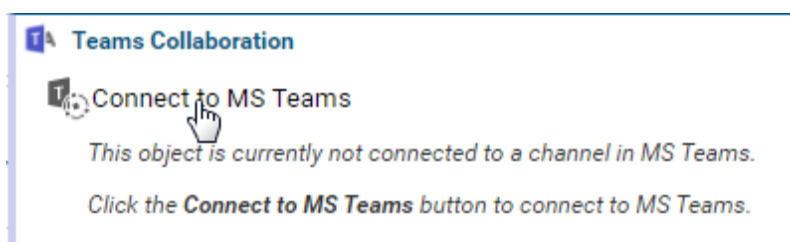


A conversation has already been started and the object is connected with a private team channel or a private team in Microsoft Teams. You are not a member of the team channel. Access can only be requested in Microsoft Teams. Click the link in the message text to access Microsoft Teams.

### Starting a New Teams Channel for an Object in Alfabet

If another colleague has already started a conversation about an object, you will see the chat in the collaboration panel and can add to it as described below in the next section. If no chat has already been started, you can start a new one:

- 1) Click **Connect to MS Teams** to create a Microsoft Teams channel for the object and start the conversation.



- 2) In the editor, define the following fields:
  - **MS Teams Connection Name:** Define the standard name for the connection to Microsoft Teams for the object. This name will also be displayed in the collaboration panel in Alfabet as heading of the conversation.
  - **MS Team:** Define which team in Microsoft Teams that the team channel for this object shall be created for. Your company can preconfigure the Microsoft Teams integration to either

allow selection of an existing Microsoft Teams team from a drop-down list only or to allow creation of new teams as well. Creation of a new team in Microsoft Teams is listed as an option in the drop-down list.

- **MS Team Display Name:** Enter the name that shall be used in Microsoft Teams for the team. If you have selected an existing team in the **MS Team** drop-down list, this field is view only.
- **MS Team Description:** Enter a description for the team that will be visible in Microsoft Teams and will help users to find the team. If you have selected an existing team in the **MS Team** drop-down list, this field will be view only.
- **MS Channel:** Select an existing team channel in the drop-down list or select the option to create a new team channel.



A conversation about an object in Alfabet can only be synchronized with a single team channel in Microsoft Teams, while multiple chats about objects can be synchronized with the same team channel in Microsoft Teams. You can combine the chat about multiple objects in one team channel. The same conversation is then displayed in the collaboration panel of all of the objects assigned to the team channel.

- **Private MS Channel:** Select the checkbox if you want the team channel in Microsoft Teams to be private, which means that only people that you actively invited will have access to the team channel in Microsoft Teams. If the checkbox is not selected, all members of the team that the team channel belongs to will have access to the channel. If you have selected an existing team channel in the **MS Channel** drop-down list, this field is view only.
- **MS Channel Display Name:** Define a name for the new team channel in Microsoft Teams. If you have selected an existing team channel in the **MS Channel** drop-down list, this field is view only.
- **MS Channel Description:** Define a description for the new team channel in Microsoft Teams that will help users to find it in Microsoft Teams. If you have selected an existing team channel in the **MS Channel** drop-down list, this field will be view only.
- **Users:** Click the **Add Users** button in the toolbar of the field and select the users that shall be explicitly invited to the conversation. Only users that have a Microsoft Teams user ID defined will be listed in the selector. The users will get a notification that they have been added to a team channel. If you have selected the **Private MS Channel** checkbox, access to the team channel in Microsoft Teams is limited to the selected users.



In Microsoft Teams, only members of the team that a team channel belongs to can access the team channel. If you add a user that is not currently member of the team that the new team channel is created in, this user will automatically be added as member to the team in Microsoft Teams.

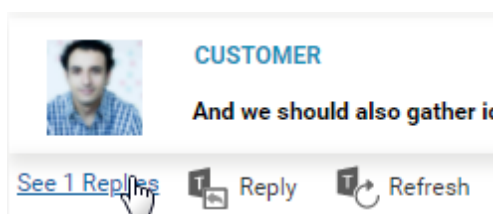
- 3) Click **OK** to create the new team channel and open the conversation in the collaboration panel. You can now start posting comments in the collaboration channel window.

### Contributing to an Existing Chat in Alfabet

If another colleague already started a conversation about this object, you will see the conversation in the collaboration panel and can contribute to it.

The conversation in the collaboration panel in Alfabet is structured identical to the conversation in the team channel in Microsoft Teams. You can start new conversations and reply to existing conversations.

Replies to a conversation are hidden by default to enhance the visibility of conversations. The number of available replies is displayed at the bottom of each conversation as a link. Clicking the link will open the replies for this conversation:






The conversation ongoing in the team channel in Microsoft Teams and the collaboration panel on the Alfabet user interface will be synchronized as follows:

- On opening the collaboration panel, the current conversation in the team channel in Microsoft Teams will be fetched and displayed in the collaboration panel.








The complete conversation in the team channel in Microsoft Teams is displayed including contributions made by Microsoft Teams users which are not Alfabet users.


- Every contribution made in the collaboration panel will be pushed to Microsoft Teams and will be immediately visible to Microsoft Teams users in the respective team channel.
- Contributions made in Microsoft Teams while the collaboration panel is still open in Alfabet are not automatically added to the collaboration panel. You must use the **Refresh**  button to update the collaboration panel. Please note that conversations and replies are refreshed separately. If you use the **Refresh**  button on the upper right of the collaboration panel, only conversations are updated. Click the **Refresh**  button button under a conversation to refresh the replies to the conversation.

Replies to conversations are by default hidden in the collaboration panel.

You can do any of the following to participate in the conversation in Alfabet:

- To start a new conversation, enter the text into the field at the bottom of the collaboration panel and click the **Send**  button.
- To start a new conversation including a snapshot of the current view, enter the text into the field at the bottom of the collaboration panel and click the **Include Current View as Snapshot**  button. The snapshot will be made available in Microsoft Teams with a link to open the view in Alfabet.
- To reply to a conversation, click the **Reply**  button under the conversation you would like to reply to. Enter a comment into the text field and click the **Send**  button.
- To send a snapshot of the current view as reply to a conversation, click the **Reply**  button under the conversation you would like to reply to. Enter a comment into the text field and click the **Include**




**Current View as Snapshot**  button. The snapshot will be made available in Microsoft Teams with a link to open the view in Alfabet.

### Inviting Users to Participate in a Chat

Additional users can be invited to an ongoing conversation about an object. This is of special relevance for the following use cases:

- In Microsoft Teams, only members of a team have access to the team channel. If you invite a user to a conversation in the collaboration panel in Alfabet and the user is not a member of the relevant Microsoft Team, the user will be automatically added as member to the team.
- If the conversation is ongoing in a private team channel, only explicitly invited users can participate in the conversation.

To add new users to an ongoing conversation in the collaboration panel:

- 1) Click the **Details**  button in the header of the collaboration panel.
- 2) In the editor, click the **Add Users** button in the **Users** field.
- 3) Select the users to be invited and click **OK**.
- 4) Click **OK** to close the editor.

### Opening the Chat in Microsoft Teams from the Collaboration Panel


You can open the team channel you are currently contributing to in the collaboration channel in Microsoft Teams:

- 1) Click the **Open in MS Teams**  button in the header of the collaboration panel.

### Viewing and Accessing All Microsoft Teams Chats You are Involved in

The **All MS Teams Collaboration Topics** functionality lists all open Microsoft Teams chats you have either started for an object or are currently invited to or participating in. The views are sorted to show the chats with posts that you did not see yet on top of the dataset.

You can select a post in the table and do one of the following:

- Click the **Navigate**  button to navigate to the object view of the object the chat is about and open the collaboration panel.
- Click the **Open in MS Teams** button to open the chat in Microsoft Teams.

The view provides the following information:

- **ID:** The ID of the object the chat is about.


- **Object:** The name of the object the chat is about. this column shows the same information about the object also displayed in explorers. For example for applications, both name and version is displayed.
- **Object Class/Stereotype :** The object class and object class stereotype of the object in the format `ObjectClassName:StereotypeName`.
- **Posts Available in Alfabet:** the number of posts that are currently visible in the collaboration panel. Please note that this is not identical to the content of the team channel in microsoft Teams. The number of posts displayed in Alfabet are limited.
- **Unread Alfabet Posts:** The number of posts in the chat you have not seen yet. Please note that these are only posts added to the chat in Alfabet. If a contribution is made in Microsoft Teams, you must refresh the chat via the collaboration channel to see whether new posts are available in Microsoft Teams.
- **Last Post:** the date and time the last post was made.
- **Last Post User:** the user who wrote the last post.

You can search for information about a chat started for a defined object using one of the following filters to search for the object:

- **Class/Stereotype Name:** Select the object class and optionally object class stereotype for which you want to see current chats from the drop-down list.
- **Object Reference :** Type part of or the complete `REFSTR` value for the object into the field. Please note that the object ID is based on the middle part of the number representing the `REFSTR` value. If you type the number which is part of the object ID into the field, you can find the object even if you do not know the `REFSTR` of the object.
- **Object:** Select the object for which you want to see the chat information from the selector. Please note that the field is only active if an object class and optionally object class stereotype has been selected in the **Class/Stereotype Name** field.

### Adding a Link to a Document in Microsoft Teams to an Object

If documents are available in the **Files** tab of the Microsoft Teams team channel connected the Alfabet object you are currently working with, you can add a link to the document to the **Attachments** page view. All users with access to the object can then select the link in the **Attachments** page view and click the **Open**

**Document Using Default Program**  button in the toolbar to open the document in Microsoft Teams. A log in to Microsoft Teams is required to access the document.

To add a link to a Microsoft Teams document:

- 1) In the toolbar, click **New > Add Web Link Based on MS Teams File Link**.
- 2) In the selector, select the file for which you would like to add a link. You can do the following to find a document in the selector:
  - To open a folder displayed in the selector, select the folder in the list and click the **Load Selected Folder** option in the menu bar of the list.
  - To go back to a superordinate folder after having opened a folder in the selector, click the **Back to Folder'<Name>** button in the menu bar of the list to go back to the parent folder or click the **Load Root Folder** button to go back to the root folder. The **Load Root Folder** button

is not available if the root folder is the parent folder of the current folder and accessible via the **Back to Folder'<Name>** button.

- To find a file or folder in the list, enter the start of the file or folder name into the field **MS Teams Drive Item Name: Starts With** field and click the **Search** button.

3) In the editor that open, define the link details:

- **Title:** Change the title of the document if necessary. The title will be displayed in the attachment list of the **Attachments** page view.
- **URL:** This field must not be changed.
- **Category:** Select one of the document category that your company defined to categorize documents.


### Ending a Chat

You can detach the conversation in the collaboration channel from the team channel in Microsoft Teams. The conversation will be deleted from the Alfabet database and the connection to the team channel will be removed. The collaboration panel will be empty after a detach action.

The team channel will still exist in Microsoft Teams. It can either be deleted from within Microsoft Teams or kept for further discussion outside of Alfabet. In addition, multiple objects in Alfabet can be connected with the same team channel in Microsoft Teams and the channel might still be used for discussion of the remaining connected objects.

After having detached the existing connection, you can establish a connection with a new or existing team channel.

To detach a conversation from the team channel in Microsoft Teams:

- 1) Click the **Detach**  button in the header of the collaboration panel.


### Managing and Scheduling Microsoft Teams Meetings in Alfabet

You can schedule new Microsoft Teams meetings about an object in Alfabet, import existing meetings from Microsoft Teams, and view, edit, accept and join meetings directly in the Alfabet user interface.

The ability to schedule meetings is also available if the object you are currently working with is not connected with a team channel in Microsoft Teams.

Microsoft Teams meetings that are scheduled in Alfabet are always referencing the object that they are scheduled for. If a **Personal Info** section is available in the object profile or object cockpit for the object, it will include the information about the number of Microsoft Teams meetings which are scheduled for the current object and the current date:

1 Open Workflow Activities

 1 Today's MS Teams Meetings

You can schedule meetings in both Microsoft Teams and in Alfabet. Alfabet. Teams meetings created in Alfabet are automatically assigned to the object they are defined for. Teams meetings in Microsoft Teams

can be imported into Alfabet for a defined objects. Teams meetings can only be imported to a single object. Teams meetings that are not about any Alfabet object are not managed in Alfabet. The Microsoft Teams meeting functionalities in Alfabet are not a copy of the calendar function in Microsoft Teams. They shall only provide a means to view and edit meetings scheduled in the context of Alfabet. You can select participants from all Alfabet users or only from the users that are assigned a role for the current object in Alfabet.


You can do any of the following to manage your Microsoft Teams meetings in Alfabet:

- [Scheduling a Microsoft Teams Meeting about an Object](#)
- [Importing a Microsoft Teams Meeting](#)
  - [Managing Your Scheduled Microsoft Teams Meetings](#)

### Scheduling a Microsoft Teams Meeting about an Object

The button interaction to schedule Microsoft Teams meeting is available for a configurable subset of object classes only. It will be available in the object profile and object cockpits for the objects of the permissible object class as well as in all views the object is the base object for.

To schedule a Microsoft Teams meeting to discuss the object you are currently working with:

- 1) In the toolbar, select **Microsoft Teams Interactions**  > **Schedule Meeting**. The **MS Teams Meeting** view opens. It lists all Microsoft Teams meetings you have currently scheduled or are invited to for the current object.
- 2) In the toolbar, click the **New Meeting** button. An editor opens.
- 3) In the editor, define the meeting details:

#### **Basic Data** tab:

- **Meeting Subject:** Enter the title of the meeting that will be displayed in calendar items.
- **Sensitivity:** this setting is currently not relevant. although a sensitivity level is available in Microsoft Teams, it is currently not actively used in Microsoft Teams. This setting will therefore be ignored as long as no Microsoft Teams functionality will use it.
- **Details:** Enter additional information about the meeting if necessary.
- **Add External Link to Object:** Select the checkbox if you want a link to the current object and view you were working with when starting to schedule the meeting to be added to the meeting invitation. If a user clicks the link in MS Teams,

**Attendees** tab: In the toolbar, click one of the following to add participants to your new scheduled meeting:

- Click **Add > Add from Person** to select participants from all Alfabet users. The selector informs about the availability of a **Microsoft Teams User ID** for the users.
- Click **Add > Add from Responsible Users** to select participants from a list of users that are assigned a role for the current object. The selector provides information about about the role the user has for the object and the availability of a **Microsoft Teams User ID** for the users.

**Availability** tab: You can do either of the following to schedule the meeting time:


- Click the **Suggest Time Slot** button to view all time slots for which the participants will be available and select a time slot. The display of time slot suggestions can be fine-tuned with the following fields:
  - **Is Organizer Optional:** Select the checkbox if you are organizing a meeting that you might not attend yourself. Time slots will then be shown even if they are not free on your own calendar.
  - **% Attendance:** If there are no time slots that are free in the calendars of all participants in the acceptable time frame for the meeting, you can set the attendance level to the minimum percentage of invited attendees that should be available. The information displayed about the time slot will inform you about the percentage of attendees available and the attendees that will not be available at that time slot.
  - **Max. Results:** Enter the maximum number of time slots to be listed.
  - **Calendar Type :** If the users in the meeting have different Microsoft Teams calendars for work and private meetings, select the type of calendar that the meeting shall be scheduled for from the drop-down list. If you select `unrestricted`, free time slots are evaluated from all calendars.
- Schedule a time via the following fields:
  - **Start Date:** Select the start date of the meeting from the calendar.
  - **Start Time:** Enter the start time of the meeting.
  - **End Date:** If you have selected the **All Day** checkbox, select the end date of the meeting.
  - **End Time:** If you have not selected the **All Day** checkbox, select the time the meeting will end.
  - **All Day:** Select the checkbox to reserve one or multiple complete days for the meeting.



Once a meeting is created, you can edit, delete, and join the meeting. The functionalities for management of Microsoft Teams meetings are the same as the functionalities in the view **My MS Teams Meetings**. for more information, see [Managing Your Scheduled Microsoft Teams Meetings](#).

### Importing a Microsoft Teams Meeting

The button interaction to schedule and import Microsoft Teams meeting is available for a configurable subset of object classes only. It will be available in the object profile and object cockpits for the objects of the permissible object class as well as in all views the object is the base object for.

- 1) In the toolbar, select **Microsoft Teams Interactions**  > **Schedule Meeting**. The **MS Teams Meeting** view opens. It lists all Microsoft Teams meetings you have currently scheduled or are invited to for the current object.
- 2) In the toolbar, click the **Import Meeting** button. An editor opens.
- 3) Optionally define the following filters to find the correct meeting to import:

- **Meeting Subject:** Enter a string to find a meeting with a meeting subject including or matching your string.
  - **Start Date / End Date:** define the time period the meeting should be in. Please note that you can only search for a time period smaller than or equal to one week. If you do not define the start and end date, all meetings in the next seven days will be displayed.
  - **Show meetings referenced by other artifacts:** Select the checkbox to also see meetings that are already imported to other objects in Alfabet. Please note that if you select a meeting that is already assigned to another Alfabet object, the meeting will be detached from the other object and moved to the current one.
- 4) Click **Search** to see all meetings matching your search.
  - 5) Select one or multiple meetings in the list and click **OK** to import the meetings.



Once a meeting is imported, you can edit, detach, delete, accept and join the meeting. The functionalities for management of Microsoft Teams meetings are the same as the functionalities in the view **My MS Teams Meetings**. for more information, see [Managing Your Scheduled Microsoft Teams Meetings](#).

### Managing Your Scheduled Microsoft Teams Meetings

In the **My MS Teams Meetings** functionality, you can accept and decline Microsoft Teams meeting invitations, cancel or edit meetings that you scheduled, and join meetings. The functionality will show all Microsoft Teams meetings that you have imported or scheduled or that were scheduled or imported by someone else to Alfabet and that you are invited to.

You can access the functionality via a link in a menu or link in the guide views configured for your user profile by your solution designer or, if implemented, via the link in a guide view that provides information about the number of Microsoft Teams meetings that are scheduled for today. the following functionalities are provided via the menu buttons for a Microsoft Teams meeting selected in the table:

- **Detach:** Click to detach the meeting from the current Alfabet object. The meeting will still exist in Microsoft Teams and can then be imported to another Alfabet object, if applicable.
- **Cancel:** Click to remove the meeting from the list and from all Microsoft Teams calendars of the participants.
- **Edit:** Click to open an editor and edit the meeting details. The fields in the editor will only be editable if you have scheduled the selected Microsoft Teams meeting.
- **Accept:** Click to accept the meeting. A new window opens. Optionally enter a comment for the organizer of the meeting and click **OK**.
- **Tentative:** Click to inform the organizer of the meeting that you might attend the meeting. A new window opens. Optionally enter a comment for the organizer of the meeting and click **OK**.
- **Decline:** Click to inform the organizer of the meeting that you will not attend the meeting. A new window opens. Optionally enter a comment for the organizer of the meeting and click **OK**.
- **Propose New Time:** Click to propose a new time for the meeting. A new window opens. enter the new time for the meeting. Optionally enter a comment for the organizer of the meeting and click **OK**. The organizer of the meeting will receive an email with your proposal.

- **Open in Outlook:** Click to open the Microsoft Outlook® calendar and see the meeting there.
- **Join:** Click to join the meeting. The meeting will open in Microsoft Teams.

the **Response Status** column in the table informs you whether you have already accepted, declined, or tentatively accepted the meeting, or whether you are the organizer of the meeting.

## Initiating, Contributing to, and Managing a Discussion About Objects

Alfabet provides a discussion functionality that supports collaborative discussions about objects in the enterprise. Any user that has been configured to be a participant in a discussion group may contribute to a discussion.

The following users can participate in a relevant discussion:

- The authorized user, member of an authorized user group, or deputy of an object. These users can initiate a discussion for objects that they are responsible for. Authorized users can contribute to, track, and close a discussion.
- The members of the discussion group that the discussion has been activated for. This discussion group is responsible for managing the discussion. The members of the managing discussion group can contribute to and track the discussion. Depending on the configuration of the discussion groups, members of the managing discussion group may have Read/Write access permissions to the object that is the focus of the discussion. The managing discussion group can invite other discussion groups to participate in the discussion and can close the discussion when it has been completed.
- The members of a discussion group that has been invited to join in the discussion. The members of the invited discussion group can contribute to and track the discussion. Depending on the configuration of the discussion groups, members of the invited discussion groups may have Read/Write access permissions to the object that is the focus of the discussion.



Discussion groups are configured in the **Discussion Groups** functionality in the **Solution Admin** functionality. For more information about the configuration required for the discussion capability, see the section *Defining Discussion Groups for Collaborative Discussions* in the reference manual *User and Solution Administration*.

The following information is available:

- [Understanding the Discussion Process](#)
- [Initiating a Discussion about an Object](#)
- [Managing and Contributing to the Discussion](#)
  - [Inviting Other Discussion Groups to Join the Discussion](#)
  - [Contributing to the Discussion](#)
  - [Editing the Object Under Discussion](#)
  - [Closing the Discussion for a Discussion Group](#)

## Understanding the Discussion Process




A discussion in Alfabet will typically proceed as follows:

- A discussion is initiated in the **Discussion** page view for a selected object by an authorized user, member of an authorized user group, or deputy who is responsible for the object. The **Discussion** page view is only available in the object profile for object classes for which the discussion capability has been configured. The configuration will specify the release status that an object must have in order for a discussion to be initiated for that object as well as which discussion groups may participate in the discussion. Typically, the user initiating the discussion will make the first contribution to the discussion explaining why discussion was initiated. When initiating the discussion, the user must select a discussion group to be the managing discussion group for the discussion.
- Any member of the managing discussion group may choose to invite other discussion groups to participate in the discussion in the **My Discussions** functionality. The managing discussion group may only invite discussion groups that have been configured to be invited to the discussion. Any member of the managing discussion group can include or exclude an invited discussion group at any time. Depending on the configuration of the discussion capability, email notification may be sent to all members of the managing discussion group and invited discussion groups when a discussion is initiated about an object.
- All users with authorized access to the object as well as members of the managing discussion group and invited discussion groups may contribute to and track the ongoing discussion about the object in the **My Discussions** functionality. Discussion participants may add comments, define the status of the discussion, and trigger email notification for other discussion participants information them about the contribution. Depending on the configuration, the members of a participating discussion group may or may not be able to edit the object targeted by the discussion.
- Once it has been determined that the discussion has been completed, an authorized user of the object or a member of the managing discussion group can deactivate and close the discussion. No further contributions can be made to an inactive discussion.

## Initiating a Discussion about an Object

The **Discussion** page view is available in the object profiles of all object classes for which the discussion capability has been configured. The view allows you to initiate a discussion about a selected object that you have authorized access to as an authorized user, member of an authorized user group, or deputy. As the initiator of the discussion, you can also contribute to and track the discussion, and close the discussion when it has been completed. Members of the discussion group managing the discussion may also close the discussion.

The **Discussion** page view displays all discussion groups that may participate in a discussion for the selected object. Each column in the view is defined below:


- **Group Type / Name** : The discussion group type is displayed in bold text. Click  to view the discussion groups that may participate in a discussion about the selected object. Any discussion



groups that are greyed out cannot participate in a discussion about the object due to the object's release status.


- **Activity State:** Displays the active or inactive state of a discussion.
- **Discussion Status:** Displays the current stage of the discussion.
- **Change Date:** Displays the date of the most recent contribution to the discussion.
- **Comments:** Displays the contribution that has most recently been added to the discussion.

To initiate a discussion for the selected object:


- 1) In the **Discussion** page view, select the discussion group for which you want to initiate a discussion about the selected object. If the discussion group has an inactive status, you can view information about the discussion group in the preview section.
- 2) In the toolbar, click the **Manage Group Discussions**  button. The **Discussion Items** editor opens.
- 3) In the **Activity State** column, change the value in the **Activity State** column to **Active**. Once the **Activity State** has been defined as active, contributions can be made to the discussion and comments added.



Activity states are configured in the **Discussion Groups** functionality available via an administrative user profile. For more information about the configuration required for the discussion capability, see the section *Defining Discussion Groups for Collaborative Discussions* in the reference manual *User and Solution Administration*.

- 4) Click **OK** to close the editor.
- 5) To make a contribution to the discussion, select the active discussion group and click the **Edit**  button. The **Discussion Contribution** editor opens.
- 6) In the **Comments** field, enter your contribution to the discussion and, if necessary, modify the status of the discussion in the **Discussion Status** field. The discussion status describes the current stage of the discussion.
- 7) If you would like the members of the participating discussion group(s) to be informed via an email notification that a contribution has been made, select the **Notify Discussion Group Members** checkbox.
- 8) Click **OK** to save your contribution to the discussion or click **Cancel** if the contribution should not be saved. The members of the participating discussion group(s) will see your comment in the **My Discussions** functionality.

Once the discussion has been completed, either the authorized user or a member of the managing discussion group can make the discussion inactive for a participating discussion group. No further contributions can be made by an inactive discussion group.

To remove a discussion group from the discussion, select the discussion group for which you want to close the discussion, click the **Manage Group Discussions**  button, and change the value in the **Activity State** column to **Inactive**. The discussion has been terminated for the discussion group and is no longer displayed in the **My Discussions** functionality. If you want to completely close the discussion for all discussion groups, you must set the activity state to **Inactive** for all discussion groups participating in the discussion.

## Managing and Contributing to the Discussion

The members of discussion groups participating in the discussion can access, contribute to, and track the discussion in the **My Discussions** functionality. Additionally, the managing discussion group can invite other relevant discussion groups to participate in the discussion, manage the status of the discussion group, and close the discussion when it has been completed.

Members of all participating discussion groups may add their contribution to the discussion in the **My Discussions** functionality. A **Show Discussion History** capability allows everyone to view and understand the development of the discussion. Depending on the configuration of the discussion groups, members of the participating discussion groups may have Read/Write access rights to the object that is the focus of the discussion.



If the release status of the object changes during the discussion to a release status that is not allowed for discussion, then the discussion will be disabled for that object. Discussion groups are configured in the **Discussion Groups** functionality accessible via an administrative user profile. For more information about the configuration required for the discussion capability, see the section *Defining Discussion Groups for Collaborative Discussions* in the reference manual *User and Solution Administration*.


The following information is available:

- [Inviting Other Discussion Groups to Join the Discussion](#)
- [Contributing to the Discussion](#)
- [Editing the Object Under Discussion](#)
- [Closing the Discussion for a Discussion Group](#)

### Inviting Other Discussion Groups to Join the Discussion

Once the discussion is initiated, all discussion groups that may participate in the discussion are displayed in the **Discussion** page view in the relevant object profile and the **My Discussions** functionality. Any member of the managing discussion group may choose to invite other relevant discussion groups to participate in the discussion. Contributions can only be made by a discussion group for which the activity state has been set to **Active**. Depending on the configuration, an email notification might be sent to all members of the invited discussion group informing them that they are being asked to participate in the discussion.

The members of the invited discussion group will also be able to access the discussion in the **My Discussions** functionality. Likewise, depending on the configuration, the members of the invited discussion groups may have Read/Write permission to the objects targeted by the discussion.


- 1) In the **My Discussions** functionality, select the managing discussion group for which the discussion has initially been activated.
- 2) In the toolbar, click the **Manage Group Discussions**  button. The **Discussion Items** editor opens.
- 3) To invite other discussion groups to participate in the discussion about a specific object, change the value in the **Activity State** column to **Active**. Once the **Activity State** has been defined as active, contributions can be made to the discussion and comments added. If you set the **Activity**

**State to Inactive** for a discussion group, you will make the discussion inactive for the entire discussion group.

- 4) Click **OK** to close the editor.

### Contributing to the Discussion

The access permissions granted to members of the discussion group are independent of the accessibility granted via an authorized user, authorized user group, or deputy definition. However, access permissions specified via mandates are applied. If your enterprise implements a federated architecture, you may be prevented from viewing an object that is the target of the discussion. In this case, you should contact your user administrator.

- 1) In the **My Discussions** functionality, select your discussion group and click the **Edit**  button. The **Discussion Contribution** editor opens.
- 2) In the **Comments** field, enter your contribution to the discussion and, if necessary, modify the status of the discussion in the **Discussion Status** field. The discussion status describes the current stage of the discussion.
- 3) If you would like the members of the participating discussion group(s) to be informed via an email notification that a contribution has been made, select the **Notify Discussion Group Members** checkbox.
- 4) Click **OK** to save your contribution to the discussion or click **Cancel** if the contribution should not be saved. The members of the participating discussion group(s) will see your comment in the **My Discussions** functionality.


### Editing the Object Under Discussion

If Read/Write access permission has been configured for the discussion group, members may edit the object that is under discussion. To edit the object, select your discussion group in the **My Discussions** func-

tionality and click the **Navigate**  button.

### Closing the Discussion for a Discussion Group

Once the discussion has been completed, either the authorized user or a member of the managing discussion group can make the discussion inactive for a participating discussion group. No further contributions can be made by an inactive discussion group.

To remove a discussion group from the discussion, select the discussion group for which you want to close the discussion, click the **Manage Group Discussions**  button, and change the value in the **Activity State** column to **Inactive**. The discussion has been terminated for the discussion group and is no longer displayed in the **My Discussions** functionality. If you want to completely close the discussion for all discussion groups, you must set the activity state to **Inactive** for all discussion groups participating in the discussion.

## Chapter 10: Sending and Receiving Assignments for Alfabet Objects

Assignments allow users to collaborate with one another about objects in the enterprise architecture.

An assignment is a task that is defined for a selected object and assigned to a specific user. The assignee is expected to provide the required input for the object by a specified due date. Assignments can be defined to be optional or mandatory. Email notifications may be configured to be sent in the context of the assignment capability.



For example, the authorized user of an ICT object might send an assignment to the authorized users of the applications owned by the ICT objects, requesting them to review specific application data. The owner of the ICT object would then create an assignment for each relevant application, assign it to the relevant user, specify a target date when the assignment should be completed, and determine whether the assignment is mandatory or optional. If necessary, additional comments can be written in the assignment and relevant documents or Web links can be attached. Assignments that require input from multiple persons can further be broken into sub-assignments.

The application owners will then receive an email notification informing them that they have a new assignment. The assignment can be accessed by the assignee in the **My Assignments** functionality. The assignee can define a reminder period for the deadline so that impending assignments are highlighted and a reminder email is sent to his/her email program when the reminder period begins. Once an assignment has been completed, the assignee can set the assignment's status to completed.

The originator of the assignment can track the progress of the assignment in the **Sent Assignments** functionality. Impending assignments can be highlighted and any assignment's that are not completed by their deadline will be returned to the originator who created the assignment. Completed assignments can be closed and removed from the **Sent Assignments** view.

There are three different contexts in Alfabet in which you may encounter assignments:

- The **Assignments** page view: In this view, you can create new assignments for the selected object, spin-off sub-assignments, update or reassign existing assignments, and keep track of all assignments created for the selected object. The **Assignments** page view also features a notepad functionality that allows you to communicate about the assignment or the object targeted by the assignment.
- The **My Assignments** functionality: All assignments that have been assigned to you are displayed in the **My Assignments** functionality. You can navigate to any object associated with an assignment and thus process each assignment based on current data. Furthermore, you can set a reminder for yourself regarding the upcoming deadline of an assignment.
- The **Sent Assignments** functionality: Here you have an overview of all assignments that you are the originator of. You can navigate to the object associated with a particular assignment and track the progress of each assignment. Furthermore, you can set a reminder for yourself about the upcoming deadline of an assignment.



For more information about the configurations necessary for the assignments capability, see the section *Configuring the Assignment Capability* in the reference manual *Configuring Alfabet with Alfabet Expand*.


The following information is available about assignments:

- [Creating and Managing Assignments for Objects](#)
  - [Creating a New Assignment for an Object](#)
  - [Communicating with Other Users About the Assignment](#)
  - [Reassigning an Assignment to a Different User](#)
  - [Changing the Status of an Assignment](#)
  - [Viewing the History of the Assignment's Status Changes](#)
  - [Creating a Sub-Assignment for an Existing Assignment](#)
  - [Defining a Proxy to Manage Your Assignments](#)
- [Working With the Assignments Assigned to You](#)
  - [Defining a Reminder about the Assignment](#)
  - [Fulfilling the Task Required by the Assignment](#)
  - [Failing to Complete an Assignment on Time](#)
- [Keeping Track of Assignments That You Have Created](#)
  - [Changing the Target Date of an Assignment That You Own and Defining a Reminder](#)
  - [Viewing Closed Assignments](#)
  - [Deleting an Assignment That You Own](#)

## Creating and Managing Assignments for Objects

When you create an assignment for a selected object, you indicate what issue is at stake concerning the selected object, assign the issue to a user in the user community who is responsible for the assignment, and define a target date to indicate when the issue should be resolved.



- An assignment is always created for a specific object. You can create an assignment for an object in the **Assignments** page view in the object profile of the targeted object or by clicking the **Notify Authorized User**  button in the toolbar of the object profile of the targeted object.
- The user that you assign the assignment to will see his/her assignments in the **My Assignments** functionality. For more information, see the section [Working With the Assignments Assigned to You](#).
- You can track and maintain the assignments that you are the originator of in the **Sent Assignments** functionality. For more information, see the section [Keeping Track of Assignments That You Have Created](#).
- For more information about the configuration necessary for the assignments capability, see the section *Configuring the Assignment Capability* in the reference manual *Configuring Alfabet with Alfabet Expand*.

Depending on the configuration of your Alfabet solution, an email notification may be sent to the authorized user of the object targeted by the assignment informing them that an assignment has been generated for the selected object. In this case, the name of the assignee will be displayed in the **To:** field of the email and the creator of the assignment will be displayed in the **From:** field of the email. If deputies are defined responsibility for the selected object in the *Authorized Deputies Page View*, they will also receive email notifications when an assignment is created. In this case, the names of the deputies will be displayed in the **CC:** field. Information about the configuration required to send emails for assignments is explained in *Configuring Email Notifications in the Context of Assignments* in the reference manual *Configuring Alfabet with Alfabet Expand*.

The **Assignments** page view is available for most objects in Alfabet. To access the **Assignments** page view, navigate to the object profile of the object that you want to create the assignment for and click **Assignments** to open the view.

The view displays all assignments associated with the selected object including critical information such as the user responsible to complete the assignment, the target date when the task should be complete, and the current status of the assignment. To display closed assignments that are no longer visible in the **Assignments** page view, select the **Show Closed Assignments with Target Date After** checkbox and specify a date in the **Calendar** field to display closed assignments that have a target date after the defined date.

The columns in the table are described below:






- **ID:** The identification number of the assignment.
- **Assignment Type:** Displays whether the assignment is optional or mandatory. A mandatory assignment must be completed by the target date or it will be returned to the originator. An optional assignment will be automatically closed if not completed by the target date. Additionally, the uncompleted assignment will be automatically removed from the **My Assignments** view of the assignee and NOT returned to the originator.
- **Name:** Displays the assignment's title.
- **Target Date:** Displays the target date or deadline for the assignment.
- **Status:** Displays the current status of the active assignment. Closed assignments are automatically removed from the view.
- **Last Changed Date:** Displays the date when the assignment's status was last changed.
- **Assignee Name:** Displays the family name of the user that the assignment is assigned to.
- **Assignee First Name:** Displays the first name of the user that the assignment is assigned to.

The following information is available:

- [Creating a New Assignment for an Object](#)
- [Communicating with Other Users About the Assignment](#)
- [Reassigning an Assignment to a Different User](#)
- [Changing the Status of an Assignment](#)
- [Viewing the History of the Assignment's Status Changes](#)
- [Creating a Sub-Assignment for an Existing Assignment](#)
- [Defining a Proxy to Manage Your Assignments](#)

## Creating a New Assignment for an Object

There are several methods to create an assignment for an object in the Alfabet database: Once an assignment has been created for a selected object, the assignment will be displayed in the assignee's **My Assignments** functionality as well as the **Sent Assignments** functionality of the person who created the assignment.

- 1) Use one of the following methods to create an assignment for an object:
  - Create an assignment in the **Assignments** page view in the object profile of the targeted object to assign the assignment to a user of your choice. You can also view all other assignments that have been created for the selected object and break down an assignment into smaller sub-assignments. Open the view and click **New > Create New Assignment**.
  - Create an assignment for an object via the **Notify Authorized User**  button in the toolbar of the object profile of the targeted object to assign the assignment to the object's authorized user. Whether the **Notify Authorized User**  button is available in an object profile will depend on the configuration of your Alfabet solution. Click the **Notify Authorized User**  button. In the editor that opens, the authorized user will automatically be entered in the **Assigned To** field.
  - Copy an existing assignment for an object in the **Assignments** page view and create a new assignment that you can assign to another person. To do so, click **New > Reuse Assignment** in the toolbar. The **Title**, **Target Date**, **Type**, **Creator**, and **Object** fields will be copied to the new assignment. Any documents that have been attached to the original assignment will be included in the new assignment but can be removed, as needed. Once the new assignment has been created, you can modify it by clicking the **Edit**  button.
- 2) The **Assignment** editor opens. Enter data in the editor, as needed. Each field is defined below:
  - **ID**: Alfabet assigns a unique identification number to each object in the inventory. This number cannot be edited.
  - **Title**: Title that clarifies the purpose of this assignment.
  - **Target Date**: Enter the target date or deadline for the assignment in the format appropriate to your cultures or click the **Calendar**  icon to select a date.
  - **Status**: Define or update the completion status of the assignment.



The set of release statuses available for the class Assignment are configured by your solution designer in the configuration tool Alfabet Expand. For more information, see the section *Defining the Statuses Used for the Assignment Capability* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- **Assigned To**: Click the **Search** icon to select the user that this assignment is assigned to.
- **Type**: Define whether completion of the assignment is **Mandatory** or **Optional**. Please note the following consequences if the assignee does not complete the assignment by the specified target date.
  - **Mandatory assignments**: If the assignee fails to complete a mandatory assignment by the target date, the status of the assignment will automatically change to a re-

assigned status when the target date is reached. Consequently, the assignment will be automatically returned to the originator of the assignment and will be removed from the assignee's **My Assignments** view.

- Optional assignments: If the assignee fails fail to complete an optional assignment by the target date, the status of the assignment will automatically change to a closed status when the target date is reached. Consequently, the assignment will be automatically removed from the assignee's **My Assignments** view. Optional assignments will NOT be returned to the originator of the assignment.
  - **Object:** Displays the object that this assignment is about.
  - **Description:** Enter a meaningful description about the assignment.
  - **Remarks:** Enter any necessary remarks about the assignment.
  - **Documents:** Attach a document stored in the **Internal Document Selector** or define a URL that pertains to the assignment. For more information about attaching documents and defining URLs, see the *Attachments Page View*.
- 3) Click **OK** to save your changes or click **Cancel** to exit without saving. The assignment will be displayed in the **Assignments** page view for the selected object. The assignment will also be displayed in the **My Assignments** view of the assignee and the **Sent Assignments** view of the user who originally created the assignment.

## Communicating with Other Users About the Assignment

A **Notepad** capability is available to facilitate free-form communication about an assignment for a selected object. Users can access the **Notepad** capability in the **Assignments** page view and write text relevant to the assignment. All entries are saved with a timestamp and displayed in the **Notes History** pane in the **Assignment Notepad** editor. Any user wishing to view the notepad entries can select the assignment in the **Assignments** page view and click **Assignment > Notepad** in the toolbar to open the **Assignment Notepad** editor.

Depending on the configuration of your Alfabet solution, the user entering a notepad entry may send an email notification to the assignee and/or the person who created the assignment. Furthermore, you can export the notepad entries displayed in the **Notes History** pane to an HTML file.



Please consider the following regarding the sending of email notifications in conjunction with the **Notepad** capability.

- A user with **ReadOnly** permission to an object associated with an assignment may create and send notes via the **Notepad** capability. Please note that, in this case, if the server settings are configured to use the sender's user profile to access Alfabet via hyperlinks in emails, the recipient of the email will also have **ReadOnly** permissions when he/she accesses the relevant views via the hyperlinks in the email notification.
- If emails are to be sent in the context of the **Notepad** capability, the email capability for assignments must be activated. For more information about activating automatic email generation in the context of the assignment capability, see the section *Configuring the Assignment Capability* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- If email notifications about notepad entries are to be sent to the originator or the assignee of the assignment, the **Notify Originator** and/or **Notify Assignee** checkboxes



respectively must be selected in the **Assignment Notepad** editor. If neither the **Notify Originator** or **Notify Assignee** checkboxes are checked, no email notification will be sent. In this case, the notepad entries can only be viewed in the **Notes History** pane in the **Assignment Notepad** editor.

To create a notepad entry:

- 1) In the **Assignments** page view for a selected object, select the assignment that you want to create a note for.
- 2) In the toolbar, click **Assignment > Notepad**. The **Assignment Notepad** editor opens.
- 3) The following fields are displayed:
  - **Notes History**: Displays a history of the notepad entries defined for the assignment. The syntax contains Date, Timestamp, User Name (of the user writing the note), ID of the assignment, and the note text.
  - **Note Info**: Displays notepad information including the timestamp, name of the user who created the notes, and the ID of the assignment that the note is for.
  - **Note Text**: Enter text for the note you want to create for the assignment.
  - **Notify Originator**: Select this checkbox if you want an email sent to the originator of the assignment informing him/her that a notepad entry has been created.
  - **Notify Assignee**: Select this checkbox if you want an email sent to the assignee of the assignment informing him/her that a notepad entry has been created.
- 4) Click **OK** to save the note or **Cancel** if you do not want to save it.

## Reassigning an Assignment to a Different User

If necessary, you can reassign an assignment to another user. For example, you might want to reassign an assignment to a user who has the permission to edit an object associated with the object that the assignment is about. The status of the assignment will be changed to **Reassigned**.




Please note the following:

- You should only reassign an assignment if it no longer concerns the current assignee in any way. Once an assignment has been reassigned, it will be removed from the original assignee's **My Assignments** functionality.
- If it is necessary to delegate a part of the task assigned to you, you may create a sub-assignment based on the original assignment. For more information, see [Creating a Sub-Assignment for an Existing Assignment](#).



When you reassign an assignment, the assignment will be displayed in the new assignee's **My Assignments** functionality as well as the **Sent Assignments** functionality of the person who originally created the assignment. Depending on the configuration of your Alfabet solution, an email notification may be sent to the new assignee informing them that they have been assigned a task for the selected object.

To reassign an assignment to another user:

- 1) In the **My Assignments** functionality, **Sent Assignments** functionality, or the **Assignments** page view for a selected object, select the assignment that you want to reassign to another user.
- 2) In the toolbar, click **Edit**  button. The **Assignment** editor opens.
- 3) In the **Assigned To** field, click the **Search** icon to select the user that this assignment is assigned to. Once you change the **Assigned To** value and close the editor by clicking **OK**, the **Status** value will automatically be set to **Re-Assigned**. Any changes you make to the **Status** value before you close the editor will be ignored.
- 4) If necessary, provide additional remarks about the assignment in the **Remarks** field or relevant documents in the **Documents** field.
- 5) Click **OK** to save your changes or click **Cancel** to exit without saving. The assignment is displayed in the **Assignments** page view for the selected object. The assignment will also be displayed in the **My Assignments** view of the new assignee and the **Sent Assignments** view of the user who originally created the assignment.

## Changing the Status of an Assignment

While the assignment is being processed, the assignment's status may need to be changed in order to indicate its degree of completion so that the user who created the assignment as well as other users interested in the object can track the progress of the assignment.

You can change an assignment's status by clicking the **Edit**  button and changing the **Status** property in the **Edit**  button editor in any of the following views:

- In the **Assignments** page view.
- In the **My Assignments** functionality.
- In the **Sent Assignments** functionality.
- In the assignment's object profile.

When you change the status of an assignment, the new status will be displayed in the assignee's **My Assignments** functionality as well as the **Sent Assignments** functionality of the person who created the assignment. Depending on the configuration of your Alfabet solution, an email notification may be sent to the person who created the assignment informing them that the assignment's status has been changed.

After an assignment's status is changed to a closed status, the assignment will be automatically removed from the views associated with the assignment capability. However, the originator of the assignment can explicitly choose to display any assignments that have been closed after a specific date in the **Sent Assignments** view. For more information about how to access closed assignments, see the section [Viewing Closed Assignments](#).

To view the assignment's previous statuses, select the assignment and click the **Assignment > Audit Trail** button. The **Assignment Audit Trail** view displays the statuses of the assignment prior to the current status as well as information about the user who made the status change and the time of the change.



The release statuses available will depend on the configuration of your Alfabet solution. The set of release statuses available for the class Assignment are configured by your solution designer

in the configuration tool Alfabet Expand. For more information, see the section *Configuring the Assignment Capability* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Viewing the History of the Assignment's Status Changes

It may be that some assignments are complex and require a long period of time between status changes. Alfabet provides a history capability that allows you to view the status changes that have been made to a selected assignment prior to the assignment's current status.

The **Assignment Audit Trail** page view for an assignment can be accessed via the following views:

- In the **Assignments** page view, select the assignment and click **Assignments > Audit Trail**.
- In the **My Assignments** functionality, select the assignment and click the **Audit Trail** button.
- In the **Sent Assignments** functionality, select the assignment and click the **Audit Trail** button.
- In the assignment's object profile, click the **Assignment Audit Trail** page view.

The following information is displayed about the assignment's history and progress:

- **Caption:** The name of the assignment
- **Target Date:** The targeted deadline of the assignment.
- **Status:** The previous status of the assignment.



The assignment's current status is NOT displayed in the **Assignment Audit Trail** view. To view the assignment's current status, click the browser's Back button to return to the **My Assignments** view.

- **Change Date:** The date that the assignment was edited.
- **Change User:** The user that edited the assignment.

You can export an HTML or Microsoft® Excel® file of this report by clicking **Export > HTML** or **Export > MS Excel File** in the toolbar. For more information about export options in Alfabet, see the section [Exporting Data](#).

## Creating a Sub-Assignment for an Existing Assignment

In order to coordinate and manage more complicated data maintenance tasks, you can create sub-assignments for an existing assignment. A sub-assignment is processed and tracked the same as a regular assignment. When you create a sub-assignment for a selected object, the sub-assignment will be displayed in the assignee's **My Assignments** functionality as well as the **Sent Assignments** functionality of the person who created the assignment.

- 1) In the **Assignments** page view for a selected object, select the assignment that you want to break down into sub-assignments.
- 2) In the toolbar, click **Assignments > Sub-Assignments**. The **Sub-Assignments** page view opens.
- 3) In the toolbar, click **New > Create New Sub-Assignment**. The **Sub-Assignments** editor opens.

4) Enter the data, as needed. Each field is defined below:

- **ID:** Alfabet assigns a unique identification number to each object in the inventory. This number cannot be edited.
- **Title:** Enter a meaningful title that clarifies the purpose of this assignment.
- **Target Date:** Enter the target date or deadline for the assignment in the appropriate format or click the **Calendar** icon to select a date.
- **Status:** Define the completion status of the assignment.



The set of release statuses available for the class Assignment are configured by your solution designer in the configuration tool Alfabet Expand. For more information, see the section *Configuring Release Status Definitions for Object Classes* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- **Assigned To:** Click the **Search** icon to select the user that this assignment is assigned to.
  - **Parent Assignment:** Displays the assignment that this assignment is subordinate to.
  - **Type:** Define whether completion of the assignment is **Mandatory** or **Optional**. Please note the following consequences if the assignee does not complete the assignment by the specified target date.
    - **Mandatory assignments:** If the assignee fails to complete a mandatory assignment by the target date, the status of the assignment will automatically change to a re-assigned status when the target date is reached. Consequently, the assignment will be automatically returned to the originator of the assignment and will be removed from the assignee's **My Assignments** view.
    - **Optional assignments:** If the assignee fails fail to complete an optional assignment by the target date, the status of the assignment will automatically change to a closed status when the target date is reached. Consequently, the assignment will be automatically removed from the assignee's **My Assignments** view. Optional assignments will NOT be returned to the originator of the assignment.
  - **Object:** Select the object that this assignment is about.
  - **Description:** Enter a meaningful description about the assignment.
  - **Remarks:** Enter any necessary remarks about the assignment such as an explanation about why the sub-assignment is necessary.
  - **Documents:** Attach a document stored in the **Internal Document Selector** or define a URL that pertains to the assignment. For more information about attaching documents and defining URLs, see the *Attachments Page View*.
- 5) Click **OK** to save your changes or click **Cancel** to exit without saving. The sub-assignment is displayed in the **Assignments** page view for the selected object. The assignment will also be displayed in the **My Assignments** view of the assignee and the **Sent Assignments** view of the user who originally created the assignment. Depending on the configuration of your Alfabet solution, email notifications may be sent to the assignee informing him/her of the new assignment.

## Defining a Proxy to Manage Your Assignments

Because assignments must be completed by a specified deadline, it is recommended that you specify alternate persons to take care of your assignments in case of a planned absence. You can define proxies to be responsible for assignments targeting objects for a specific object class. You should not assign more than one user per object class.

During the times that you are absent as specified in the **User's Availability** page view, each proxy user you have defined will have the necessary access permissions to the assignments that he/she is responsible for via the proxy definition. The assignments will be accessible in the proxy's **My Assignments** view.



Your planned absences and general availability must be documented in the *User's Availability Page View*.



Email notifications will continue to be sent to the original user. Please note that the proxy user will NOT receive email notifications. A notification monitor can be configured to notify the proxy about the workflow step. For more information, see the section *Defining Notification Monitors* in the reference manual *User and Solution Administration*.

To define a proxy for your assignments:

- 1) Navigate to the **Personal Info** functionality and click **User's Proxies**.
- 2) In the toolbar, click the **Add Assignments Proxy** button. The **Proxy Definition** editor opens.
- 3) In the editor that opens, select a user in the **Proxy** field.
- 4) In the **Sub-Categories** field, select the object class that the assignments are based on that is relevant for the selected person. This person will only be authorized to view and access assignments that are created for objects in the selected object class(es).
- 5) Click **OK** to close the editor and save your data.

## Working With the Assignments Assigned to You

The **My Assignments** functionality provides you with an overview of all active assignments that have been assigned to you and that you currently responsible for completing. After an assignment's status is changed to a closed status, the assignment will automatically disappear from the **My Assignments** functionality. An optional assignment that is not completed by the target date will automatically be changed to a closed status and will be removed from the **My Assignments** functionality.

The columns in the table are described below:

- **ID:** The identification number of the assignment.
- **Assignment Type:** Displays whether the assignment is optional or mandatory. A mandatory assignment must be completed by the target date or it will be returned to the originator. An optional assignment will be automatically closed if not completed by the target date. Additionally, the uncompleted assignment will be automatically removed from the **My Assignments** view of the assignee and NOT returned to the originator.
- **Name:** Displays the assignment's title.

- **Target Date:** Displays the target date or deadline for the assignment. If you have defined a reminder for yourself about impending assignments, any assignments that have reached the defined reminder period will be highlighted. To define reminders about impending target dates, see the section [Defining a Reminder about the Assignment](#).
- **Status:** Displays the current status of the active assignment. Closed assignments are automatically removed from the view.
- **Last Changed Date:** Displays the date when the assignment's status was last changed.
- **Object ID:** Displays the identification number of the object that the assignment has been created for.
- **Object Name:** Displays the name of the object that the assignment has been created for.
- **Originator Name:** Displays the family name of the user that has assigned this assignment to you.
- **Originator First Name:** Displays the first name of the user that has assigned this assignment to you.



Please keep the following in mind:

- You cannot create new assignments here. An assignment is created for a specific object in the **Assignments** page view associated with that object. For more information, see the section [Creating and Managing Assignments for Objects](#).
- Assignments that you have created are listed in the **Sent Assignments** functionality. For more information, see the section [Keeping Track of Assignments That You Have Created](#).
- For an overview of the configuration required to work with the assignment capability, see the section *Configuring the Assignment Capability* in the reference manual *Configuring Alfabet with Alfabet Expand*.

For more information about working with assignments that have been assigned to you, see the following topics

- [Defining a Reminder about the Assignment](#)
- [Fulfilling the Task Required by the Assignment](#)
- [Failing to Complete an Assignment on Time](#)

The following procedures are also often necessary when working with assignments.

- [Communicating with Other Users About the Assignment](#)
- [Reassigning an Assignment to a Different User](#)
- [Changing the Status of an Assignment](#)
- [Creating a Sub-Assignment for an Existing Assignment](#)

## Defining a Reminder about the Assignment

You can define a reminder for yourself that lets you know when the assignments that you are responsible for are about to reach their target dates. When you define the reminder period, assignments with a target

date that fall within the defined period will be highlighted red in the **My Assignments** table. You can define a date before or after the assignments' target date.

To define a reminder for yourself about the assignment:

- 1) In the **My Assignments** functionality, click the **Configure Reminder Period** button in the toolbar. In the window that opens, define the following settings, as needed:
  - **Reminder Period (days):** Enter the number of days before the target date when an assignment in the **My Assignments** table should be highlighted. If you want assignments highlighted after a target date, enter a negative number value (for example, "-5" indicates that the reminder should be triggered five days after a target date).
  - **Send Reminder Notifications:** Select this checkbox if you want an automatically-generated email notification sent to your email account when the reminder is triggered. Automatic email notification must be configured for the assignment capability in order for reminder notifications to be sent. For more information about configurability requirements, see the section *Configuring the Assignment Capability* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- 2) Click **OK** to save your changes, or click **Cancel** to exit without saving. The assignment will be highlighted red when it reaches the reminder period you have defined.



To communicate with the assignee about an assignment that is due, see [Communicating with Other Users About the Assignment](#).

## Fulfilling the Task Required by the Assignment


To complete the task specified by the assignment, you will need to understand the task that is required of you as well as the view in which you can carry out the required task. Once the task has been completed, you must change the status of the assignment to indicate that it has been completed.



In some cases, you may not be able to complete the assignment because you need additional feedback or other users to contribute to the assignment. In this case, functionalities available in the **Assignments** page view allow you to break down the assignment into sub-assignments or communicate with other users about the assignment. For more information, see the following:

- [Creating a Sub-Assignment for an Existing Assignment](#)
- [Communicating with Other Users About the Assignment](#)

To carry out the task required by the assignment:

- 1) Select the assignment in the **My Assignments** functionality. In the preview pane below, scroll the information in order to display the description of the assignment as well as any remarks that may be useful to completing the task.
- 2) To navigate to the object profile of the object that is targeted by the assignment, select the object in the table and click the **Navigate**  button and carry out the required task.



For help finding the relevant page view, please refer to the context-sensitive Help available for the object profile you are currently working with.

- 3) Once the task has been completed, return to the **My Assignments** functionality or the **Assignments** page view for the object and change the status of the assignment to indicate that it has been completed. To change the status of the assignment, see the section [Changing the Status of an Assignment](#).

## Failing to Complete an Assignment on Time

Completing an assignment entails carrying out the task that is required and changing the status of the assignment to a completed status.



You must manually change the **Status** property of the assignment in order for it to be recognized as finished in the assignment capability. To change the status of the assignment, see the section [Changing the Status of an Assignment](#).

Please note the following consequences if you do not complete an assignment that you are responsible for:

- **Mandatory Assignments:** If you fail to complete a mandatory assignment by the target date, the status of the assignment will automatically change to a re-assigned status when the target date is reached. Consequently, the assignment will be automatically returned to the originator of the assignment and will be removed from your **My Assignments** view.
- **Optional Assignments:** If you fail to complete an optional assignment by the target date, the status of the assignment will automatically change to a closed status when the target date is reached. Consequently, the assignment will be automatically removed from your **My Assignments** view. Optional assignments will not be returned to the originator of the assignment.

It is therefore highly recommended that you define a reminder period for your assignments so that they do not leave your **My Assignments** functionality before you have completed them. All assignments that fall within the reminder period you define will be highlighted red in the My Assignments table. Additionally, you can set the reminder capability to send email notifications to your email program letting you know that a target date is impending for an assignment that you are responsible for.

For or more information about defining a reminder period, see the section [Defining a Reminder about the Assignment](#).

## Keeping Track of Assignments That You Have Created

The **Sent Assignments** functionality allows users who have created assignments to keep track of the progress of all assignments that they own.

The **Sent Assignments** functionality displays all assignments that you have created that have not yet reached a completed status. Select any assignment in the table to display a preview showing the selected assignment's description and creation/update history. To display closed assignments that are no longer visible in the **Sent Assignments** functionality, select the **Show Closed Assignments with Target Date After** checkbox and a date in the **Calendar** field to display closed assignments that have a target date



after the selected date. All assignments with a closed status that have a target date after the selected date will be included in the table.

The columns in the table are described below:

- **ID:**The identification number of the assignment.
- **Assignment Type:** Displays whether the assignment is optional or mandatory. A mandatory assignment must be completed by the target date or it will be returned to the originator. An optional assignment will be automatically closed if not completed by the target date. Additionally, the uncompleted assignment will be automatically removed from the **My Assignments** view of the assignee and NOT returned to the originator.
- **Name:** Displays the assignment's title.
- **Target Date:** Displays the target date or deadline for the assignment. If you have defined a reminder for yourself about impending assignments, any assignments that have reached the defined reminder period will be highlighted.
- **Status:** Displays the current status of the active assignment. Closed assignments are automatically removed from the view.
- **Last Changed Date:** Displays the date when the assignment's status was last changed.
- **Object ID:** Displays the identification number of the object that the assignment has been created for.
- **Object Names:** Displays the name of the object that the assignment has been created for.
- **Assignee Name:** Displays the family name of the user that the assignment is assigned to.
- **Assignee First Name:** Displays the first name of the user that the assignment is assigned to.



- New assignments cannot be created in the **Sent Assignments** functionality. An assignment can be created for a specific object in the **Assignments** page view associated with that object. For more information, see the section [Creating a New Assignment for an Object](#).
- Any assignments that have been assigned to you and that you are responsible for are listed in the **My Assignments** functionality. For more information, see [Working With the Assignments Assigned to You](#).
- For more information about the configurations necessary for the assignments capability, see the section *Configuring the Assignment Capability* in the reference manual *Configuring Alfabet with Alfabet Expand*.

For more information about working with assignments that have created, see the following information:

- [Changing the Target Date of an Assignment That You Own and Defining a Reminder](#)
- [Viewing Closed Assignments](#)
- [Deleting an Assignment That You Own](#)

The following procedures are also often necessary when working with assignments.

- [Communicating with Other Users About the Assignment](#)


- [Reassigning an Assignment to a Different User](#)
- [Changing the Status of an Assignment](#)
- [Creating a Sub-Assignment for an Existing Assignment](#)

## Changing the Target Date of an Assignment That You Own and Defining a Reminder

In some cases, it may be necessary to change the assignment's target date. Only the owner of the assignment (the person who created the assignment) may change the target date. When you change the target date of an assignment, the new target date will be displayed in the assignee's **My Assignments** functionality.

You can also define a reminder for yourself that lets you know when the assignments that you have created are about to reach their target dates. When you define the reminder period, assignments with a target date that fall within the defined period will be highlighted red in the **Sent Assignments** table. You can define a date before or after the assignments' target date.

To change the status of an assignment:

- 1) In the **Sent Assignments** functionality, select the assignment that you want to reassign to another user.
- 2) In the toolbar, click **Edit**  button. The **Assignment** editor opens.
- 3) In the **Target Date** field, enter the new target date.
- 4) If necessary, provide additional remarks about the assignment in the **Remarks** field or relevant documents in the **Documents** field.
- 5) Click **OK** to save your changes or click **Cancel** to exit without saving. The assignment target date will be updated in the **Assignments** page view for the selected object. The assignment target date will also be displayed in the **My Assignments** view of the assignee and the **Sent Assignments** view of the user who originally created the assignment.
- 6) To view the assignment's previous target date, select the assignment and click the **Assignment > Audit Trail** button. The **Assignment Audit Trail** view displays the target date of the assignment prior to the current change as well as information about the user and time of the change.

To define a reminder about an assignment's target date.

- 1) In the **Sent Assignments** functionality, click the **Configure Reminder Period** button in the toolbar. In the window that opens, define the following setting, as needed:
  - **Highlight Assignments Due in (days)**: Enter the number of days prior to the target date when an assignment in your **Sent Assignments** table should be highlighted. If you want assignments highlighted after a target date, enter a negative value (for example, "-5" indicates that the reminder should be triggered five days after a target date).
- 2) Click **OK** to save your changes, or click **Cancel** to exit without saving. The assignment will be highlighted red when it reaches the reminder period you have defined.



To communicate with the assignee about the assignment that is due, see [Communicating with Other Users About the Assignment](#).

## Viewing Closed Assignments

An assignment can be closed by either the assignee or originator once it has been completed. On optional assignment that is not completed by the target date will also be automatically closed. After an assignment's status is changed to a closed status, the assignment will be automatically removed from the views associated with the assignment capability. However, the originator of the assignment can explicitly choose to display any assignments that have been closed in the **Sent Assignments** view.


- 1) In the **Sent Assignments** functionality, select the **Show Closed Assignments with Target Date After** checkbox.
- 2) In the **Calendar** field, enter a date to show all closed assignments with a target date later than the date entered.
- 3) Click the **Update** button. All closed assignments that meet the filter criteria will be displayed

## Deleting an Assignment That You Own

The owner of the assignment (the person who created the assignment) or the authorized user of the object targeted by the assignment may delete the assignment.



You can delete an assignment regardless of its status. If you delete an object in the object class Assignment, it will be irrevocably deleted from the Alfabet database. If any of the following dependent objects or data is defined for the deleted object, these will also be deleted: Sub-Assignment; Assignment Notepad.



- 1) In the **Sent Assignments** functionality, select the assignment you want to delete.
- 2) In the toolbar, click the **Delete**  button.
- 3) Confirm the warning by clicking **Yes**, or click **No** to exit without deleting the selected object(s).

## Chapter 11: Executing Workflows and Participating in Workflow Steps

A workflow is a collaborative process made up of workflow steps that are typically carried out by one or more users. A workflow is based on a configured workflow template that determines the sequence of workflow steps that are to be performed on a specific object and its references by specified user(s). Workflow steps may have specific pre- and post-conditions that determine different paths to take in the workflow depending on whether the conditions are or are not met.

Typically, the workflow owner is the user who initiates and is responsible for maintaining the workflow. When a workflow is initiated by the workflow owner and when a workflow advances to the next workflow step, relevant users may be informed via automatically-generated emails of their impending responsibility for the workflow step. This functionality ensures that all relevant users are informed and reminded of their responsibilities in the collaborative workflow. The option to refuse, delegate, and pause workflow steps, remind users of an impending target date for a workflow step as well as redirect a workflow that has encountered an error enables workflow owners and workflow administrators to keep track, coordinate, and manage the completion of each workflow step and the workflow as a whole.

The workflow capability provided in Alfabet allows you to perform all tasks related to workflows:

- Workflows can be started based on configured workflow templates. When a workflow template is triggered, a workflow is generated for each object found by the workflow template. Depending on the configuration of the workflow template, it is possible that only one workflow is generated or perhaps hundreds of workflows. The user who triggers the workflow template is considered the owner of the workflow(s). Workflows may be started in the following ways:
  - Via the **My Workflows** functionalities. For more information about starting workflows via the **My Workflows** functionality, see the section [Starting and Maintaining Workflows in the My Workflows Functionality](#).
  - Via the **Workflow**  button in the toolbar of an object profile of an object class for which workflow templates have been configured. The **Workflow**  button in the object profile/object cockpit allows the user to start a workflow for the selected object. For more information about starting a workflow for a selected object via its object profile/object cockpit, see the section [Starting a Workflow for an Object via the Object Profile/Object Cockpit](#).
  - Via configured batch processes that are initiated by the system administrator. Some workflow templates may be configured to start automatically via a batch process. In this case, the user who initiates the batch process is the owner of the workflow and will be responsible for maintaining the workflows that he/she has initiated. The workflow administrator, however, can reassign such workflows to a different workflow owner in the **Workflow Administration** functionality. For more information about changing the workflow owner, see the section *Changing the Owner of a Workflow Template or Workflow* in the reference manual *User and Solution Administration*.
- Workflows can be tracked and managed by the workflow owner. For more information, see the section [Starting and Maintaining Workflows in the My Workflows Functionality](#).
- Workflow steps can be viewed, performed, and managed by the users that are responsible for the workflow steps. The user(s) responsible for a workflow step may edit the object targeted by the workflow step even though they may not otherwise have access permissions to the object. However, access permissions will not be granted for the object outside of the context of the workflow step.

Workflow steps are processed in either the **My Workflow Activities** functionalities or, if configured by your solution designer in the **Workflow Activities Explorer**. For more information, see the section [Performing the Workflow Steps That You Are Responsible For](#).





A **Workflow Administration** functionality is available via an administrative user profile that allows a workflow administrator to track the progress and resolve a conflict for any workflow. For example, if a workflow step's target date has expired or if no responsible user is assigned to a workflow step or found via the query specified for the workflow template, the workflow step will escalate. These errors must be dealt with and resolved by either the workflow owner or the workflow administrator. The workflow administrator may also carry out other tasks such as rechanneling the workflow to another workflow step, changing the state of a workflow template or the owner of a workflow. For more information about the functionalities available to the workflow administrator, see the chapter *Tracking and Managing Workflows* in the reference manual *User and Solution Administration*.

The following information is available for workflow owners and users responsible for workflow steps:

- [Starting a Workflow for an Object via the Object Profile/Object Cockpit](#)
- [Starting and Maintaining Workflows in the My Workflows Functionality](#)
  - [Triggering a Workflow Template and Starting Workflows in the My Workflows Functionality](#)
  - [Accessing More Information About the Workflow](#)
  - [Understand the Course of the Workflow](#)
  - [Suspending, Resuming, or Withdrawing the Workflow](#)
    - [Understanding Event Values and Resolving Workflow Errors](#)
  - [Fixing a Workflow with an Error State](#)
    - [Redirecting a Workflow Step to Another Step](#)
    - [Adding Responsible Users to a Workflow Step](#)
    - [Delegating a Workflow Step to Another User](#)
  - [Deleting a Running Workflow](#)
- [Performing the Workflow Steps That You Are Responsible For](#)
  - [Performing and Tracking Your Workflow Steps in the Workflow Activities Explorer Functionality](#)
  - [Performing and Tracking Your Workflow Steps in the My Workflow Activities Functionality](#)
    - [Accessing More Information About the Workflow Step](#)
    - [Performing and Completing a Workflow Step](#)
    - [Delegating a Workflow Step to Another Alfabet User](#)
    - [Refusing a Workflow Step](#)
    - [Releasing the Lock on a Workflow Step](#)
    - [Accessing Details about the Current Workflow Step](#)

- [Accessing Details about the Preceding Workflow Step](#)
- [Performing and Tracking Your Workflow Steps for a Selected Object in the Associated Workflows Page View](#)
- [Defining a Proxy to Manage Your Workflow Steps](#)

## Starting a Workflow for an Object via the Object Profile/Object Cockpit

If a workflow can be initiated for an existing object, a **Workflow**  button will be displayed in the toolbar of the object's object profile/object cockpit. If more than one workflow template exists that you have access permissions to for the object class, all relevant workflow templates will be displayed in the drop-down menu when the **Workflow**  button is clicked.

You can initiate a workflow for the selected object for any workflow template displayed in the drop-down menu. Once you initiate and start a workflow, you are the workflow owner for the entire duration of the workflow unless the workflow administrator changes the workflow owner. As workflow owner, you are responsible for tracking the progress of the workflow from its start to completion as well as ensuring that the current workflow step is being performed in a timely manner.



You can only start a workflow via the object profile if a workflow template has been configured that allows for workflows to start for existing objects in the relevant object class. For more information about the configuration of the workflow functionality for an object profile, see the section *Configuring the Manual Start of Workflows* in the chapter *Configuring Workflows* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Project: PRJ-18 Implement Unified Trade Solution

[Project Profile](#) [Project Solution Comparison Cockpit](#) [Project Target Architecture Cockpit](#) [Business Standard Cockpit](#) [Cost Management Cockpit](#)


The screenshot shows the 'Workflow' menu open over the object profile for 'PRJ-18'. The menu options are:


- Controlled Solution Check-In
- Design Project for selected project
- Project Approval
- Request Resources

The object profile details are as follows:

ID	PRJ-18	STEREOTYPE	Project
STATUS	New	PLANNED START DATE	01/07/2014
PLANNED END DATE	29/12/2017	PARENT	Consolidate Trading Applications
SOLUTION OF	Reshape Core Trading Applications	BUCKET	Trading
AUTHORIZED USER	Alfons Alfabet		

FIGURE: Starting a workflow for a selected object in the object profile

- To initiate a workflow for the selected object, click the **Workflow**  button in the object profile/object cockpit toolbar and select the relevant workflow template that you want the workflow to be based on. Depending on the definition of the initial workflow step, you may see any of the following:
  - An editor in which you can create and define an object. Enter the relevant data and click **OK** to close editor.
  - A wizard that will guide you through the workflow step. Enter the relevant data for each view and click **Next** to advance to the next view in the wizard. Click **Finish** when all views are done. For general information about using a wizard, see [Entering Data in Editors and Wizards](#) in the reference manual *Getting Started with Alfabet*. If you do not complete the data input in the current session and you are working in a wizard, the following will apply:
    - If the workflow was started by creating a new object:**
      - If the user has entered information in the first wizard step and clicked the **Next** button and then cancels the wizard, the first workflow step and the newly created object WILL be saved to the database.
      - If the user has entered information in the first wizard step, has NOT clicked the **Next** button and then cancels the wizard, the workflow step as well as the newly created object will NOT be saved to the database.
    - If the workflow was started with an existing object** and the wizard was cancelled during the first wizard step, the workflow step will not be saved to the database.

- A report that should be reviewed. Typically this step requires no data entry.
  - A page view that may require data entry or may require a review.
  - An object profile that may require data entry or may require a review.
  - In some cases, the first workflow step may be a system-generated action that does not require user input or user action. Typically, an informational message will be configured by your workflow designer letting you know that the workflow has been started.
- 2) Carry out the necessary data entry or data review required for the first workflow step. The data input that is required for the first workflow step may be none or minimal and you may be able to complete the first workflow step immediately. Or, the data input that is required may be more extensive and you may need to perform the first workflow step over multiple sessions. Please note the following:
- If you complete the input of required data in the current session, the workflow will automatically begin once you close the relevant editor, wizard, page view, etc. The new workflow will be displayed in the **Workflows** section of the **My Workflows** functionality and, if the workflow step is complete, will show **Running** in the **Workflow State** column. You can track and maintain the workflow in the **My Workflows** functionality. For more information, see the section [Starting and Maintaining Workflows in the My Workflows Functionality](#).
  - If you do not complete the data input required in the current session, any data you have entered in the relevant editor, page view, etc. will be saved. The new workflow will be displayed in the **Workflows** section of the **My Workflows** functionality and will show **Pending** in the **Workflow State** column. You can return to the first workflow step at any time in the **My Workflows** functionality. To view all workflows that are still in the state of initiation, select the value **Pending** in the **Workflow State** filter in the **My Workflows** functionality. To resume definition of the interrupted workflow step, select the workflow and click the **Perform**  button in the **My Workflows** functionality. The relevant view will open that allows you to continue the definition of the initial workflow step. For more information, see the section [Starting and Maintaining Workflows in the My Workflows Functionality](#).
  - Once the workflow is running, the users responsible to perform the workflow step displayed in the **Current Step** column will be able to access and process the workflow step. For more information about processing a workflow step, see the section [Performing the Workflow Steps That You Are Responsible For](#).

## Starting and Maintaining Workflows in the My Workflows Functionality

Workflows in Alfabet are based on a workflow template that is configured in the configuration tool Alfabet Expand by your company's workflow designer.

A workflow template is a customer-defined blueprint for one or more workflows. The template specifies what object class is the point-of-departure in the workflow, which user groups and/or user profiles may initiate and administrate the workflow, which workflow steps comprise the workflow as well as their sequence, any possible per- and post-conditions or update actions associated with a workflow step, and what kinds of workflow notifications should be sent to collaborating users in which contexts. The user who creates the workflow template is the workflow template owner.




A workflow template must have the attribute **Workflow State** attribute set to `Plan` to be configured and validated. Once the workflow template is completed and approved, the attribute **Workflow State** must be switched to `Active` in order to make it available to the user community. Once the workflow template is available in Alfabet, a permitted user may initiate a workflow based on the workflow template. Multiple workflows may be simultaneously initiated and running for a workflow template.

The **My Workflows** functionalities displays all workflow templates that you have access permissions to. You can trigger workflows for any of these workflow templates. A workflow will be started for every object found by the query configured for the workflow template.

Typically, the Alfabet user who triggers the workflow is the owner of the workflow. The workflow owner is responsible for maintaining the workflow and ensuring its progress towards completion. The option to refuse, delegate, withdraw, and suspend workflow steps, remind users of an impending target date for a workflow step as well as redirect a workflow that has encountered an error enables workflow owners and workflow administrators to keep track, coordinate, and manage the completion of each workflow step and the workflow as a whole.

When a workflow is initiated by the workflow owner, relevant Alfabet users are typically informed via automatically generated emails of their impending responsibility in the workflow. Whether emails are automatically sent when a workflow step is entered will depend on the configuration of the workflow.

Before you start workflows, you should familiarize yourself with the information displayed in these functionalities. The table is divided into two sections. The **Workflows** section displays all workflows that you are the workflow owner of. These are the workflows that you have initiated or been assigned ownership of by your workflow administrator. Click the  to expand a workflow in order to view its currently active workflow step. The **Start New Workflow** section of the table displays all workflow templates that you have access permissions to. You may trigger workflows for any of the workflow templates displayed.



Please note that a maximum of 100 workflows and workflow templates will be displayed in the view. If the combination of workflows and workflow templates exceeds 100, navigate to the next page of results via the floating toolbar in the lower right corner of the view.

It may be that you have access permissions to many workflow templates and an excessive amount of workflows. Filters allow you to limit the workflow templates and workflows displayed according to various criteria. For example, to view all workflows that are currently in progress, you could select the value **Running** in the **Workflow State** filter. You can define one or more of the following filters as needed:

- **Workflow Templates:** Click the arrow to select one or more active workflow templates. All workflows that have been initiated for the selected active workflow template(s) will be displayed in the table. Only active workflow templates that may be started manually will be displayed in the table. Workflow templates configured to start automatically will not be displayed.
- **Workflow:** Click the arrow to select one or more workflows to display in the table. All instances of the selected workflow(s) will be displayed in the table, including any workflows based on retired or renamed workflow templates.
- **Workflow State:** Click the arrow to select one or more workflow states. All workflows with the selected workflow state(s) will be displayed in the table.
- Click the **Update** button to apply your filter settings to the information displayed. The view displays the following columns: **Workflow:** Displays the name of the workflow. The workflow's name is automatically the same as the workflow template that the workflow is based on.
- **Workflow ID:** Displays the identification number of the workflow.

- **Current Workflow Step:** Displays the name of the workflow step that is currently being performed in the workflow. You must expand the workflow to see the workflow step.
- **Workflow Step ID:** Displays the identification number of the current workflow step.
- **Object ID:** Displays the identification number of the object that is being processed in the current workflow step.
- **Object Name:** Displays the name of the object that is being processed in the workflow step.
- **Start Date:** Displays the timestamp showing when the workflow/workflow step was started.
- **End Date:** Displays the timestamp showing when the workflow/workflow step was completed.
- **Workflow State:** Displays the current state of the workflow/workflow step. For more information about the meaning of the various values and how to resolve errors, see the section [Understanding Event Values and Resolving Workflow Errors](#).

The following information is available regarding the initiation of workflows:


- [Triggering a Workflow Template and Starting Workflows in the My Workflows Functionality](#)
- [Accessing More Information About the Workflow](#)
- [Understand the Course of the Workflow](#)
- [Suspending, Resuming, or Withdrawing the Workflow](#)
  - [Understanding Event Values and Resolving Workflow Errors](#)
- [Fixing a Workflow with an Error State](#)
  - [Redirecting a Workflow Step to Another Step](#)
  - [Adding Responsible Users to a Workflow Step](#)
  - [Delegating a Workflow Step to Another User](#)
- [Deleting a Running Workflow](#)





## Triggering a Workflow Template and Starting Workflows in the My Workflows Functionality

All workflow templates that you have access permissions for will be displayed in the **Start New Workflow** section of the table in the **My Workflows** functionalities. You can start workflows for any workflow template displayed in this section of the table.


Once you start a workflow, you are the workflow owner for the entire duration of the workflow unless the workflow administrator changes the workflow owner. As workflow owner, you are responsible for tracking the progress of the workflow from its start to completion as well as ensuring that the current workflow step is being performed in a timely manner.

- 1) In the **Start New Workflow** section of the table, click the workflow template that you want to initiate as a workflow.

- 2) In the toolbar, click the **New Workflow**  button. Depending on the definition of the initial workflow step, you may see any of the following:
- An object selector in which you can select an object to define. Select the relevant object in the object selector and in the editor that opens, enter the relevant data and click **OK** to close editor. If the base class configured for the workflow template is an object class stereotype (<ObjectClass:ObjectClassStereotype>), then you must select an object of the correct stereotype in the object selector.
  - An editor in which you can create and define an object. Enter the relevant data and click **OK** to close editor.
  - A wizard that will guide you through the workflow step. Enter the relevant data for each view and click **Next** to advance to the next view in the wizard. Click **Finish** when all views are completed. For general information about using a wizard, see [Entering Data in Editors and Wizards](#) in the reference manual *Getting Started with Alfabet*. If you do not complete the data input in the current session and you are working in a wizard, the following will apply:
    - **If the workflow was started by creating a new object:**
      - If the user has entered information in the first wizard step and clicked the **Next** button and then cancels the wizard, the first workflow step and the newly created object WILL be saved to the database.
      - If the user has entered information in the first wizard step, has NOT clicked the **Next** button and then cancels the wizard, the workflow step as well as the newly created object will NOT be saved to the database.
    - **If the workflow was started with an existing object** and the wizard was cancelled during the first wizard step, the workflow step will not be saved to the database.
  - A report that should be reviewed. Typically this step requires no data entry.
  - A page view that may require data entry or may require a review.
  - An object profile that may require data entry or may require a review.
  - In some cases, the first workflow step may be a system-generated action that does not require user input or user action. Typically, an informational message will be configured by your workflow designer letting you know that the workflow has been started.
- 3) Carry out the necessary data entry or data review required for the first workflow step. The data input that is required for the first workflow step may be none or minimal and you may be able to complete the first workflow step immediately. Or, the data input that is required may be more extensive and you may need to perform the first workflow step over multiple sessions. Please note the following:
- If you complete the required data input in the current session, the workflow will automatically begin once you close the relevant editor, wizard, page view, etc. The new workflow will be displayed in the **Workflows** section of the table and, if the workflow step is complete, will display the value **Running** in the **Workflow State** column. You can click the **Start Date** caption at the top of the column in order to sort the workflows according to the start date and quickly find them in the table. Once the workflow is running, the users responsible to perform the workflow step displayed in the **Current Workflow Step** column will be able to access and process the workflow step. For more information about processing a workflow step, see the section [Performing the Workflow Steps That You Are Responsible For](#).

- If you do not complete the required data input in the current session, any data you have entered in the relevant editor, page view, etc. will be saved. The new workflow will be displayed in the **Workflows** section of the table and will display the value **Pending** in the **Workflow State** column. You can return to the first workflow step at any time. To view all workflows that are still in the state of initiation, select the value **Pending** in the **Workflow State** filter. To resume definition of the interrupted workflow step, select the workflow in the table and click the **Perform**  button. The relevant view will open that allows you to continue the definition of the initial workflow step.
- 4) Once you have created the workflow by performing the initial workflow step, click the  symbol next to **Workflows** to expand the table and display the workflow that you just created. Once all the data has been defined, the following will be possible depending on the configuration of the workflow step:
- If you see the value **Initiation** in the **Workflow State** column, the initial workflow step has not been completed. To resume definition of the interrupted workflow step, select the workflow in the table and click the **Perform**  button. The relevant view will open that allows you to continue the definition of the initial workflow step.
  - If you see the value **Running** in the **Workflow State** column, the workflow has automatically started and you must take no further action. The workflow will advance to the next workflow step and the user(s) responsible to perform the workflow step will see the new step in the **My Workflow Activities** functionality. Once the workflow has advanced to the next workflow step, emails are typically generated and the user(s) who are responsible to carry out the subsequent workflow step will be notified.
  - If you see the value **Suspended** in the **Workflow State** column, the execution of the workflow has been paused. This can be done by either the workflow administrator or workflow owner. A paused workflow can be resumed in the **Workflow Event Trace** page view. For more information, see the section [Understand the Course of the Workflow](#).
  - If you see the value **Finished** in the **Workflow State** column, the initial workflow step has been completed. If the workflow is made up of system-generated workflow steps, it is possible that the workflow is completed without any user needing to take action.
  - If you see the value **Withdrawn** in the **Workflow State** column, the workflow has been withdrawn by either the workflow administrator or workflow owner.
  - If you see the value **Error** in the **Workflow State** column, select the workflow and click the **Navigate**  button. Open the **Workflow Event Trace** page view to view an explanation of the error. For more information, see the section [Understand the Course of the Workflow](#).



To withdraw the workflow, select the workflow and click the **Withdraw**  button in the toolbar. The workflow has been withdrawn from the user community and any current workflow steps will no longer be displayed in the **My Workflow Activities** view of the responsible users.


## Accessing More Information About the Workflow

There are a number of different means to access more information about the workflow in the **My Workflows** functionalities:

- To display the workflow template's preview, click-and-hold the workflow. The following attributes are displayed:

- **Workflow Name:** The technical name of the workflow template.
- **Workflow Caption:** The caption of the workflow template.
- **Workflow Description:** Information describing the purpose of the workflow template.


- To open the object profile of the workflow template, select the workflow template and click the

**Navigate**  button in the toolbar. The following information is displayed:

- **Caption:** The caption of the workflow template.
- **Base Class:** The base class of the workflow template. This is the object class that the workflow begins with when the initial workflow step is performed.
- **Workflow Template State:** The state of the workflow template.
- **Owner:** The name of the current workflow template owner.
- **Description:** Information describing the purpose of the workflow template.

- To display the workflow's preview, click-and-hold the workflow. The following attributes are displayed:

- **ID:** The identification number of the workflow that is being processed.
- **Workflow Name:** The technical name of the workflow.
- **Workflow Caption:** The caption of the workflow.
- **Workflow Base Class:** The base class of the workflow template. This is the object class that the workflow begins with when the initial workflow step is performed.
- **Workflow State:** The state of the workflow.
- **Automatic Start:** Displays True if the workflow was automatically started via a batch process. For more information about configuring and initiating a batch process for workflows, see the section *Batch Processes for Workflows with AlfaWorkflowCommandPrompt.exe* in the reference manual *System Administration*.


- To open the object profile of the workflow, select the workflow and click the **Navigate**  button in the toolbar. The following information is displayed:

- **ID:** The identification number of the workflow that is being processed.
- **Workflow Name:** The technical name of the workflow.
- **Workflow Caption:** The caption of the workflow.


- **Workflow Base Object Class:** The base class of the workflow template. This is the object class that the workflow begins with when the initial workflow step is performed.
- **Start Base Object:** The name of the object that the workflow was initiated for.
- **Workflow State:** The state of the workflow.
- **Owner:** The name of the current workflow owner.
- **Initiator:** The name of the user who initiated the workflow.
- **Locked By:** The name of the user who is performing the current workflow step.
- **Start:** The timestamp showing when the current workflow was started.
- **End:** The timestamp showing when the current workflow was completed.
- **Current Step:** The workflow step that is currently being processed.
- **Workflow Template:** The name of the workflow template that the workflow is based on.
- **Comment:** Information describing the purpose of the selected workflow.



The following page views are also available in the workflow object profile:

- For more information about the **Workflow Event Trace** page view, see the section *Suspending, Resuming, or Withdrawing the Workflow*.
  - For more information about the **Workflow Diagram** page view, see the section *Understand the Course of the Workflow*.
  - For more information about the **Active Workflow Steps** page view, see the section *Fixing a Workflow with an Error State*.
- To view the workflow and all of its potential workflow steps, select the workflow and click the **Show Workflow Diagram**  button to open the **Workflow Diagram** page view. Alternatively, you can click-and-hold the workflow and click **Details** to navigate to the **Workflow Diagram** page view. For more information about how to read the diagram, see the section [Understand the Course of the Workflow](#).
  - To open the workflow step's preview, click-and-hold the workflow. The following attributes are displayed:
    - **ID:** The identification number of the workflow that is being processed.
    - **Workflow Step Name:** The technical name of the workflow step.
    - **Workflow Step Caption:** The caption of the workflow step.
    - **Workflow Step State:** The state of the workflow step.
    - **Is Confirmable :** Displays `True` if the workflow step can be processed or `False` if the workflow step either needs to be performed, is paused, or is blocked by an error.
    - **Workflow Step Base Object Class:** The base class of the object that the workflow step targets.

- To open the object profile of the workflow step, select the workflow step and click the

**Navigate**  button in the toolbar. The following information is displayed:

- **Workflow Step Description:** Displays the description of the workflow step.
- **ID:** Displays the identification number of the selected workflow step.
- **Name:** Displays the technical name of the selected workflow step.
- **Caption:** Displays the caption of the selected workflow step.
- **Workflow:** Displays the name of the workflow that the workflow step belongs to.
- **Previous Step:** Displays the name of the workflow step that was performed before the selected workflow step.
- **Base Object:** Displays the name of the object that the workflow started with.
- **Workflow Step State:** Displays the state of the workflow step.
- **Ready :** Displays `True` if the workflow step can be processed. Displays `False` if the workflow step is being pause or is blocked by an error.
- **Locked By:** Displays the name of the person currently performing the workflow step.
- **Automatic Closure :** Displays `True` if the workflow step will be automatically closed and advance to the next workflow step via a batch process if all post-conditions have been satisfied. The user responsible for the workflow step does not need to manually confirm the workflow step in this case. Displays `False` if the workflow step must be manually confirmed by the responsible user.
- **Due Date:** Displays the target date by which the workflow step should be completed.
- **Responsible Users:** Displays the names of the users that are responsible for performing the workflow step.
- **Completed Users.** Displays the names of the users that have performed the workflow step.



The following page views are also available in the workflow object profile:

- For more information about the **Active Step Activities** page view, see the section [Accessing Details about the Current Workflow Step](#).
- For more information about the **Activities of Preceding Steps** page view, see the section [Accessing Details about the Preceding Workflow Step](#).

Running workflows that may be running too long without being completed may be closed by the workflow administrator or workflow owner. To close one or more running workflows, select the running workflows in the **Workflow** section of the table and click **Manage > Close Running Workflows**. The workflow state will be changed to **Withdrawn** and the workflow will be removed from the dataset of running workflows. To view the closed workflow, select the option **Withdrawn** in the **Workflow State** filter and click the **Update** button.

## Understand the Course of the Workflow

The **Workflow Diagram** page view allows you to view graphic information about the selected workflow. The diagram displays all workflow steps defined for the workflow template and the possible paths the workflow may take depending on the fulfillment of configured pre-conditions or post-conditions. This view is for informational purposes only and cannot be edited.



If a workflow diagram has been configured for the associated workflow template in the configuration tool Alfabet Expand, that diagram will be displayed in this page view. If no workflow diagram has been designed, a default diagram will be automatically generated. The layout of the default diagram cannot be edited. For more information about designing workflow diagrams, see the section *Configuring and Visualizing a Workflow in a Diagram* in the reference manual *Configuring Alfabet with Alfabet Expand*.

Navigate to the object profile of the relevant workflow and open the **Workflow Diagram** page view. Please keep the following in mind when viewing the workflow diagram:

- A yellow rectangle is the active step that is currently pending. The step may be pending because it is being performed or because a sub-workflow was triggered during the workflow step. Once the sub-workflow is finished and the workflow step is completed, the rectangle will turn green.
- A green rectangle is a completed step.
- A grey rectangle is a step that has been refused or expired.
- A red rectangle is a workflow where an error has occurred.
- A white rectangle is a step that has not yet been performed or will not be performed (for example, for workflow steps on a path that the workflow does not take because a pre-condition has not been satisfied).
- A blue arrow points to the next workflow step in the configured sequence of the workflow.
- A red arrow points to the next workflow step specified in the configuration should a workflow step be refused.
- A green arrow points to the next workflow step specified in the configuration should a workflow step expire.
- Select a workflow step that has been entered (yellow, green, grey, or red rectangles), and click-and-hold to open the preview window to view basic information about the workflow step. It is not possible to open the preview for a workflow step that has not been instantiated.
- Select a workflow step that has been entered (yellow, green, grey, or red rectangles), and click the

**Navigate**



button in the toolbar to open the object profile of the workflow step.

## Suspending, Resuming, or Withdrawing the Workflow





The **Workflow Event Trace** page view allows workflow owners and workflow administrators to suspend, resume, or withdraw workflows from operation. Furthermore, it provides valuable information about the course of events that have occurred in a workflow. The view displays all events for the selected workflow. You can limit the content in the view by defining filters. In the **Event Type** field, select the type of events



that you want to display. In the **Workflow Step** field, select the workflow step(s) that you want to display. Click **Update** to apply the filter criteria to the view. The following information is displayed:


- **Event** : Displays the actions that have occurred to the workflow. Any workflow that is in the state `Error` is in immediate need of attention and must be dealt with by either the workflow owner or workflow administrator. The workflow owner and workflow administrator will typically be informed of the escalated state of the workflow step via email. For detailed description of all potential values displayed in the **Events** column as well as their meaning, see [Understanding Event Values and Resolving Workflow Errors](#).
- **Step**: Displays the workflow step number and caption.
- **Step ID**: Displays the identification number of the workflow step.
- **Initiator of Action**: Displays the name of the user triggering the event.
- **Affected Users**: Displays the users that are impacted by the event.
- **Confirmation Type**: Displays who is responsible to confirm the relevant workflow step. The following values may be displayed:
  - `AllUsers`: Indicates that all responsible users must perform/confirm the workflow step in order to complete the workflow step.
  - `SingleUser`: Indicates that only one of the responsible users must perform/confirm the workflow step in order to complete the workflow step.
  - `SingleUserOfEachUserGroup`: Indicates that one responsible user from each responsible user group must perform/confirm the workflow step in order to complete the workflow step.
- **Message**: Displays either system messages or messages entered by responsible users. If the workflow step is escalated because one or more pre-conditions for the successor step have not been met, you will see the message text configured for the pre-condition(s), which should indicate what is required to fulfill the pre-condition.
- **Time Stamp**: Displays the timestamp indicating when the event occurred.

To suspend and resume the workflow:

- To suspend the workflow, select the current workflow event and click the **Suspend**  button in the toolbar. Depending on the configuration of the workflow step, email notifications may be sent to all users responsible for the selected workflow step informing them that the workflow has been paused. The current workflow step will no longer be displayed in the **My Workflow Activities** view of the responsible users. The workflow will have the state Suspended. To continue the workflow step, you must select the **Resume**  button.
- To continue the workflow, select the current workflow event and click the **Resume**  button in the toolbar. Depending on the configuration of the workflow step, email notifications may be sent to all users responsible for the selected workflow step informing them that the workflow has been resumed. The current workflow step will be displayed in the **My Workflow Activities** view of the responsible users. The workflow step will have the state Running.
- To withdraw the workflow, select the current workflow event and click the **Withdraw**  button in the toolbar. The workflow has been withdrawn from the user community and any current workflow steps will no longer be displayed in the **My Workflow Activities** view of the responsible users.

## Understanding Event Values and Resolving Workflow Errors

The following values may appear in the **Event** column:

Event Column Value	Meaning and Possible Resolution
Error	<p>The workflow step has encountered an error during its execution. The value <code>Error</code> indicates that an error has occurred in the execution of the workflow. This could be caused by the following situations:</p> <ul style="list-style-type: none"> <li>No responsible users have been found for the current workflow step. In this case, the workflow owner can add responsible users to the workflow step. This is carried out in the <b>Active Step Activities</b> page view. For more information, see the section <a href="#">Fixing a Workflow with an Error State</a>.</li> <li>A responsible user has refused a workflow step and no next step has been configured for this situation. This error must be corrected in the configuration of the workflow template. Please contact your workflow designer.</li> <li>A workflow step has expired and no next step has been configured for this situation. This error must be corrected in the configuration of the workflow template. Please contact your workflow designer.</li> <li>Multiple workflow steps qualify as a next step based on the pre-conditions defined for the potential next steps. This error must be corrected in the configuration of the workflow template. Please contact your workflow designer.</li> <li>A workflow step cannot be performed because a required wizard is absent or a required Alfabet query cannot be executed. This error must be corrected in the configuration of the workflow template. Please contact your workflow designer.</li> </ul> <p><b>NOTE:</b> For more information, contact your workflow designer or see the chapter <i>Configuring Workflows</i> in the reference manual <i>Configuring Alfabet with Alfabet Expand</i>.</p>
Resolved_StepResponsibleNot-Found	<p>If the workflow step is in an <code>Error</code> state because no responsible users were found for the current workflow step and the workflow owner has added responsible users to the workflow step via the <b>Active Step Activities</b> page view, this event type will be displayed displaying the user who resolved the error and the users assigned responsibility for the workflow step.</p>
StepCancelled	<p>The workflow step has been cancelled. This could be the result of redirecting the workflow to another workflow step via the <b>Go To</b>  button.</p>
StepConfirmed	<p>The workflow step has been confirmed by all responsible users required to confirm the workflow step.</p>

Event Column Value	Meaning and Possible Resolution
StepDelegated	The workflow step has been delegated by a responsible user to another responsible user. Text in the <b>Comments</b> column provides an explanation about the delegation.
StepEntered	The workflow step has been started.
StepExited	The workflow step has been exited. All responsible users required to confirm have confirmed the workflow step.
StepExpired	<p>The configured amount of time to complete the workflow step has been surpassed and the workflow step is now expired. Depending on the configuration, the workflow step may be automatically redirected to another workflow step. If this is not the case, the workflow owner can redirect the workflow to another workflow step. This is carried out in the <b>Active Step Activities</b> page view. For more information, see the section <a href="#">Fixing a Workflow with an Error State</a>.</p> <p><b>NOTE:</b> For more information about configuring the amount of time to complete a workflow step, see the section <i>Defining a Deadline and Reminders for a Workflow Step</i> in the reference manual <i>Configuring Alfabet with Alfabet Expand</i>.</p> <p><b>NOTE:</b> Depending on the configuration of the workflow step, the step may automatically advance to another workflow step if expired. For more information about configuring a workflow step to follow an expired workflow step, see the section <i>Defining the Sequence of the Workflow Steps</i> in the reference manual <i>Configuring Alfabet with Alfabet Expand</i>.</p>
StepPerformed	The workflow step is being performed by a responsible user and is therefore locked and cannot be accessed.
StepRefused	<p>The workflow step has been refused by a responsible user. All other responsible users are no longer required to confirm the workflow step. Depending on the configuration, the workflow step may be redirected to another workflow step.</p> <p><b>NOTE :</b> Depending on the configuration of the workflow step, the step may automatically advance to another workflow step if refused. In this case, the <code>StepEntered</code> value will be displayed in the <b>Event</b> column and will indicate the workflow step that has been configured to follow in case of refusal. For more information about configuring the refusal of a workflow step, see the section <i>Defining the Sequence of the Workflow Steps</i> in the reference manual <i>Configuring Alfabet with Alfabet Expand</i>.</p>
WorkflowFinished	The workflow has completed the last workflow step. There are no next workflow steps.
WorkflowStarted	The workflow has started and is in process.

Event Column Value	Meaning and Possible Resolution
WorkflowSuspended	The workflow administrator or workflow owner has paused the execution of the workflow.
WorkflowResumed	The workflow administrator or workflow owner has resumed the execution of the workflow.
WorkflowTrigger	One or more sub-workflows have been triggered by the current workflow step. The superordinate workflow can proceed to the next workflow step and will not wait for the completion of the sub-workflows. The sub-workflow(s) are triggered and executed independent of the parent workflow triggering them.
WorkflowTriggeredAndWait	One or more sub-workflows have been triggered by the current workflow step. The superordinate workflow will resume activity as soon as the first of the sub-workflows has finished. The completion of the first sub-workflow will be used to determine how to proceed in the superordinate workflow.
WorkflowUpdated	<p>The workflow template has been updated in the context of a migration to a new workflow template. In the case of a running workflow, the current workflow step based on the old workflow template will be cancelled and automatically updated according to the new workflow template. The state defined for the workflow prior to the migration will be maintained. This is particularly relevant for workflows with the state <code>WorkflowSuspended</code>.</p> <p><b>NOTE:</b> For more information about the configuration of a workflow template migration, see the section <i>Creating a Migration Definition to Update Running Workflows</i> in the reference manual <i>Configuring Alfabet with Alfabet Expand</i>.</p>
WorkflowWithdrawn	The workflow step has been withdrawn and is no longer a current workflow step. Typically, the workflow will be configured so that the workflow will advance to another configured workflow step.

## Fixing a Workflow with an Error State

The **Active Workflow Steps** page view allows workflow owners and workflow administrators to delegate a workflow step to another user, add new responsible users to the workflow steps, or redirect the workflow to a different workflow step.

Any workflow that is in the state `Error` is in immediate need of attention and must be dealt with by either the workflow owner or workflow administrator. The workflow owner and workflow administrator will typically be informed of the escalated state of the workflow step via email. In this case, the workflow owner or workflow administrator should first review the error displayed in the **Event Type** column in the **Workflow Event Trace** page view to understand the type of error that has occurred.

The event type `Error` could be caused by a number of situations. Typically errors result due to problems in the configuration of the workflow template. For example, an error could occur because a responsible user has refused a workflow step and no next step has been configured for this situation, multiple workflow steps qualify as a next step based on the pre-conditions defined for the potential next steps, or a workflow step cannot be performed because a required wizard is absent or a required query cannot be executed. These are errors that typically must be resolved in the configuration of the workflow. In this case, you must contact your workflow designer so that the configuration of the workflow template is corrected.

In some cases, the event type `Error` could be caused because no responsible users have been found for the current workflow step. The event type `StepExpired` indicates that the time configured to complete the workflow step has been surpassed. In this case, the workflow owner can redirect the workflow to another workflow step. Both of these errors can be corrected as described below by the workflow owner or workflow administrator in the **Active Step Activities** page view.



For more information about working with the **Workflow Event Trace** page view and understanding the event type values, see the sections [Suspending, Resuming, or Withdrawing the Workflow](#) and [Understanding Event Values and Resolving Workflow Errors](#).


The following information is available:

- [Redirecting a Workflow Step to Another Step](#)
- [Adding Responsible Users to a Workflow Step](#)
- [Delegating a Workflow Step to Another User](#)

### Redirecting a Workflow Step to Another Step


Any workflow that displays a state with the value `Error` is in immediate need of attention. This indicates that an error has occurred in the execution of the workflow and the workflow must either be rechanneled or, depending on the cause of the error, reconfigured.

To rechannel the workflow to a different workflow step:


- 1) Navigate to the object profile of the relevant workflow and open the **Active Workflow Steps** page view.
- 2) Select the current workflow event and click the **Go To**  button in the toolbar.
- 3) An editor will open that requires you to select the new workflow step and provide an explanation about why you are redirecting the workflow step. In the **Go to Another Workflow Step** editor that opens, define the following:
  - **Select the workflow step...:** Select the workflow step that the workflow should be redirected to.
  - **Execute the post-conditions...:** Set a checkmark if post-conditions configured for the workflow step selected in the **Active Workflow Steps** page view should be checked before the new workflow step is triggered.
  - **Execute the pre-conditions...:** Set a checkmark if pre-conditions configured for the workflow step selected in the **Select the workflow step...** field should be checked.

- **Comment:** Provide an explanation about why the workflow is being redirected to the selected workflow step. The explanation will be available to the user responsible for the subsequent step in the object profile of the workflow step.
- 4) Click **OK** to save your changes. The responsible user(s) will typically be notified via email that they are responsible for the new workflow step.

### Adding Responsible Users to a Workflow Step

If the workflow is in a state of `Error` because no users have been identified as responsible for the workflow step, then you must manually assign responsible users to the workflow step in order to resolve the workflow error. The **Add Responsible Users**  button will be enabled if no responsible users have been found via the workflow step configuration. The new responsible user(s) will typically be notified via email that the workflow step has been delegated to him/her.


To add responsible users to a workflow step:

- 1) Navigate to the object profile of the relevant workflow and open the **Active Workflow Steps** page view.
- 2) Select the current workflow event and click the **Add Responsible Users**  button in the toolbar.
- 3) The person selector will open. Select the relevant users to add to the workflow step.
- 4) Click **OK** to save the definition or click **Cancel** to exit the editor without saving your changes. The selected user(s) will typically be notified via email that they have been assigned a workflow step. The event type `Resolved_StepResponsiblesNotFound` will be displayed in the **Event** column in the **Workflow Event Trace** page view.

### Delegating a Workflow Step to Another User

A workflow may need to be delegated to another responsible user. You can specify whether the responsibility of the workflow will be removed from only the selected responsible user or all users responsible for the workflow step. The delegated user will typically be notified via email that the workflow step has been delegated to him/her.

To delegate the workflow to another responsible user:

- 1) Navigate to the object profile of the relevant workflow and open the **Active Workflow Steps** page view.
- 2) Select the current workflow event and click the **Delegate**  button in the toolbar.
- 3) An editor will open that requires you to provide an explanation about why you are delegating the workflow step to the selected user. In the **Delegate Workflow Step** editor that opens, define the following:
  - **Substitute All Current Workflow Step Owners:** Select this checkbox if all users currently responsible for the selected workflow step should be replaced by the user(s) that the workflow step is being delegated to.

- **Revoke Responsibility from Current User:** Select this checkbox if you want to remove yourself as a user responsible for the workflow step that is being delegated. Clear this checkbox if you want to include yourself as a user responsible for the workflow step that is being delegated.
  - **Comment:** Provide an explanation about why the workflow is being delegated to another user. The explanation will be displayed in the **Message** column of the **Workflow Step Event Trace** page view.
  - **Delegates:** Click the **Add Person** button to select one or more persons to delegate the workflow step to.
- 4) Click **OK** to save the delegation definition or click **Cancel** to exit the editor without saving your changes. The selected user(s) will typically be notified via email that the workflow step has been delegated to him/her.


## Deleting a Running Workflow

You can delete a workflow that has been initiated or started. The workflow and its workflow steps will be irrevocably deleted from the database.



If you delete a running workflow, you also delete any workflow step that is currently being performed by a responsible user. In this case, the workflow will be removed from the **My Workflows** functionality of the user owning the workflow. Any associated workflow steps will be automatically deleted from the **My Workflow Activities** functionality of all users responsible for the workflow step.

To delete a workflow:

- 1) In the **Workflows** section of the table, click the workflow that you want to delete.
- 2) In the toolbar, click the **Delete**  button.
- 3) Confirm the warning by clicking **Yes**, or click **No** to exit without deleting the selected object(s).

## Performing the Workflow Steps That You Are Responsible For

Depending on the configuration of the workflow capability by your solution designer, either a configured **Workflow Activities Explorer** or a **My Workflow Activities** functionality will be available for you to perform and manage the workflow steps that you are responsible for. Although the methods to perform, refuse, or delegate a workflow step are generally similar in all of the functionalities, the interface in which you manage and process your workflow steps will be different.

Typically you will be sent an email notification with a hyperlink to the workflow step that you must perform. Please note that once a workflow step has been confirmed and thus completed, the workflow step can no longer be opened via the link in the email notification.

If the workflow step requires that you edit an object, you will be able to edit it in the context of the workflow step even though you may not otherwise have access permissions to the object. However, you will not have access permissions to the object outside of the context of the workflow step.

The following information is available:

- [Performing and Tracking Your Workflow Steps in the Workflow Activities Explorer Functionality](#)
- [Performing and Tracking Your Workflow Steps in the My Workflow Activities Functionality](#)
  - [Accessing More Information About the Workflow Step](#)
  - [Performing and Completing a Workflow Step](#)
  - [Delegating a Workflow Step to Another Alfabet User](#)
  - [Refusing a Workflow Step](#)
  - [Releasing the Lock on a Workflow Step](#)
  - [Accessing Details about the Current Workflow Step](#)
  - [Accessing Details about the Preceding Workflow Step](#)
- [Performing and Tracking Your Workflow Steps for a Selected Object in the Associated Workflows Page View](#)
- [Defining a Proxy to Manage Your Workflow Steps](#)

## Performing and Tracking Your Workflow Steps in the Workflow Activities Explorer Functionality

The **Workflow Activities Explorer** functionality supports users in processing workflow activities. The functionality features a user-friendly design and layout of data in Alfabet similar to established email management systems so that users can more easily and efficiently accomplish their workflow tasks. Because the view is highly configurable, users can be provided with precisely the data they need in order to process the task-at-hand with a minimum number of clicks and navigation to other views.








Please note the following:

- The number of days that finished, refused, and expired workflow activities will continue to be displayed in the **Workflow Activities Explorer** functionality is specified by your solution designer in the XML object `SolutionOptions`. For more information, see the section *Configuring the Workflow Activities Explorer (WFS\_Explorer)* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- The sort order of the workflow activities as well as the focus in the **Workflow Activities Explorer** can be defined in the **Workflow Explorer Settings** tab in the **User Settings** editor. For more information, see the section [Defining Your User Settings in Alfabet](#).

The **Workflow Activities Explorer** functionality typically includes the following elements:

- The **Start New Workflow** node that allows you to open a view to trigger a new workflow. Click the node to display the **My Workflows** view to the right of the explorer. The view displays the table section **Workflows** which displays running workflows and **Workflow Templates** which displays workflow templates that you have access permissions to. For more information about how to create new workflows, see the section [Starting and Maintaining Workflows in the My Workflows Functionality](#).



- Depending on whether you have workflow activities (workflow steps) that are open, finished, or expired, the **My Workflow Activities** explorer will display the nodes **Open Activities** and **Finished Activities**. Symbols indicate the respective completion status of each workflow activity. Completed activities are displayed in the **Finished Activities** list for 30 days. Click the + symbol to expand a list and click the - symbol to collapse a list. The following symbols may be displayed:
  - Open Activities**  (including pending workflow activities )
  - Finished Activities**
  - Cancelled Activities** 
  - Withdrawn Activities** 
  - Refused Activities**
  - Expired Activities** 
- To sort the order of the workflow activities based on various criteria, click the **My Workflow Activities** root node. In the **Workflow Activities Sort Order** field, specify whether the workflow activities should be sorted based on the caption of either the workflow or workflow activity, the name of the object targeted by the workflow activity, or by the amount of time left to complete the workflow activity, whereby the most urgent workflow activities are at the top of the explorer. Click the **Update** button to apply the sort order to the **My Workflow Activities** explorer.
- To display detailed information about the task in the reading pane, click a workflow activity in the left pane. The header of the reading pane displays the name of the workflow activity and targeted object as well as a brief task description.
- Below the header is comprehensive data about the workflow activity and target object needed to support complete the workflow activity.
  - The data may contain hyperlinks that allow you to navigate to another object view, page view, or configured report.
  - The data may display a long list of responsible users. Due to size limitations, only a set of users will be displayed in the reading pane. A link... + <number> more... will be displayed that, when clicked, opens a window showing all users responsible for the workflow step.
- The toolbar above the reading pane displays only the action buttons relevant for the selected workflow activity. Click a button in the toolbar to perform the relevant action. Please note that the captions and symbols on the buttons are configurable and thus may vary among workflow activities. Once the workflow activity is completed, it will automatically be removed from the **Open Activities** section of the explorer and placed in the **Finished Activities** section.
- The explorer search functionality supports the user in finding a specific workflow activity in the activities lists. For more information about using the explorer search functionality, see the section [Working with Explorers](#) in the chapter [Navigating the Alfabet Interface](#) in the reference manual *Getting Started with Alfabet*.
- Workflow activities that are finished, expired, cancelled, etc. will remain visible in the **Workflow Activities Explorer** functionality for 30 days after they have been completed, etc. Thereafter, they will be automatically removed from the explorer.
- In general, the operations available in the **Workflow Activities Explorer** functionality are described in the section [Performing and Tracking Your Workflow Steps in the My Workflow Activities](#)

[Functionality](#) although the buttons available and the captions on those buttons will typically differ from standard view.





For more information about the configuration of the **Workflow Activities Explorer** functionality, see the section *Configuring and Visualizing a Workflow in a Diagram* in the chapter *Configuring Workflows* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Performing and Tracking Your Workflow Steps in the My Workflow Activities Functionality


The **My Workflow Activities** functionality allows you to manage and perform all workflow steps that you are responsible for. To include the workflow steps that you are responsible for as a proxy, check the **Show Proxy Steps** checkbox and click the **Update** button.

The view shows all workflow steps that you are responsible for. A row that is highlighted grey displays a workflow step that has been performed and is ready for completion/confirmation. For more information about how to process the workflow step, see the section [Performing the Workflow Steps That You Are Responsible For](#). The **My Workflow Activities** view displays the following information:

- **Workflow:** Displays the name of the workflow that the workflow step belongs to.
- **Workflow ID:** Displays the identification number of the workflow that is being processed.
- **Object Name:** Displays the name of the object that is being processed in the workflow step.
- **Object ID:** Displays the identification number of the object that is being processed in the current workflow step.
- **Active Step:** Displays the name of the workflow step that is currently being performed in the workflow.
- **Step ID:** Displays the identification number of the workflow step that is being processed.
- **Previous Step:** Displays the name of the workflow step that was performed prior to the current workflow step.
- **Enter Date:** Displays the timestamp showing when the workflow advanced to the current workflow step.
- **Remaining Days:** If a deadline has been configured, displays the number of days left before the workflow step expires.
- **Ready:** Displays a checkmark if the current workflow step has been performed and is ready to be confirmed and completed.
- **Locked By:** Displays the name of the user who is currently working on the workflow step.
- **Current Step Comments:** Displays a checkmark if a comment has been made for the current workflow step. To access the comment, select the workflow step, click the **Navigate**  button and click **Active Step Activities** to view the comments in the **Message** column.

- **Previous Step Comments:** Displays a checkmark if a comment has been made for the previous workflow step. To access the comment, select the workflow step, click the **Navigate**  button and click **Activities of Preceding Steps** to view the comments in the **Message** column.



If you are the workflow owner: To withdraw the workflow, select the workflow and click the **Withdraw**  button in the toolbar. The workflow has been withdrawn from the user community and any current workflow steps will no longer be displayed in the **My Workflow Activities** view of the responsible users.


Workflow activities that are finished, expired, cancelled, etc. will remain visible in the My Workflow Activities views for 30 days after they have been completed, etc. Thereafter, they will be automatically removed from the view.

The following information is available:

- [Accessing More Information About the Workflow Step](#)
- [Performing and Completing a Workflow Step](#)
- [Delegating a Workflow Step to Another Alfabet User](#)
- [Refusing a Workflow Step](#)
- [Releasing the Lock on a Workflow Step](#)
- [Accessing Details about the Current Workflow Step](#)
- [Accessing Details about the Preceding Workflow Step](#)

### Accessing More Information About the Workflow Step

There are a number of different means to access more information about the workflow in the **My Workflow Activities** functionalities:

- To display the preview of the workflow step, click-and-hold the workflow step. The following attributes are displayed:
  - **ID:** The identification number of the workflow that is being processed.
  - **Workflow Step Name:** The technical name of the workflow step.
  - **Workflow Step Caption:** The caption of the workflow step.
  - **Workflow Step State:** The state of the workflow step.
  - **Is Confirmable :** Displays `True` if the workflow step can be processed or `False` if the workflow step either needs to be performed, is paused, or is blocked by an error.
  - **Workflow Step Base Object Class:** The base class of the object that the workflow step targets.
- To view the object profile of the workflow step, select the workflow step and click the **Navigate**  button and click **Navigate to Activity**. The following information is displayed:


- **Workflow Step Description:** Displays the description of the workflow step.
- **ID:** Displays the identification number of the selected workflow step.
- **Name:** Displays the technical name of the selected workflow step.
- **Caption:** Displays the caption of the selected workflow step.
- **Workflow:** Displays the name of the workflow that the workflow step belongs to.
- **Previous Step:** Displays the name of the workflow step that was performed before the selected workflow step.
- **Base Object:** Displays the name of the object that the workflow started with.
- **Workflow Step State:** Displays the state of the workflow step.
- **Ready :** Displays `True` if the workflow step can be processed. Displays `False` if the workflow step is being pause or is blocked by an error.
- **Locked By:** Displays the name of the person currently performing the workflow step.
- **Automatic Closure :** Displays `True` if the workflow step will be automatically closed and advance to the next workflow step via a batch process if all post-conditions have been satisfied. The user responsible for the workflow step does not need to manually confirm the workflow step in this case. Displays `False` if the workflow step must be manually confirmed by the responsible user.
- **Due Date:** Displays the target date by which the workflow step should be completed.
- **Responsible Users:** Displays the names of the users that are responsible for performing the workflow step.
- **Completed Users.** Displays the names of the users that have performed the workflow step.




Please keep the following in mind when accessing this view:

- If you have accessed an object profile of a completed workflow step, you will see a `ReadOnly` view. The attributes of the workflow step will be displayed but actions available via toolbar buttons will be disabled.
- If you have accessed an object profile of a pending workflow step, you may process the workflow step from the object profile. Any actions that are enabled for the selected workflow step can be executed via the toolbar buttons in the object profile.


The following page views are also available in the workflow step object profile:





- For more information about the **Active Step Activities** page view, see the section [Accessing Details about the Current Workflow Step](#).
  - For more information about the **Activities of Preceding Steps** page view, see the section [Accessing Details about the Preceding Workflow Step](#).
- To open the object profile of the object targeted by the workflow step, select the workflow step and click the **Navigate**  button and click **Navigate to Object**.




- To view the workflow step in the context of the workflow, select the workflow step and click the **Show Workflow Diagram**  button to open the **Workflow Diagram** page view. Alternatively, you can click-and-hold the workflow step and click **Details** to navigate to the **Workflow Diagram** page view. For more information about how to read the diagram, see the section [Understand the Course of the Workflow](#).

### Performing and Completing a Workflow Step

Workflow steps can be viewed, performed, and managed by the users that are responsible for the workflow steps. The user(s) responsible for a workflow step may edit the object targeted by the workflow step even though they may not otherwise have access permissions to the object. However, access permissions will not be granted for the object outside of the context of the workflow step.

- To perform a workflow step, select the workflow step in the view and click the **Perform**  button. Depending on the configuration of the workflow step, you may see any of the following:
  - An editor in which you can define an object. Enter the relevant data and click **OK** to close editor.
  - A wizard that will guide you through the workflow step. Enter the relevant data for each view and click **Next** to advance to the next view in the wizard. Click **Finish** when all views are completed. For general information about using a wizard, see [Entering Data in Editors and Wizards](#) in the reference manual *Getting Started with Alfabet*. If you do not complete the data input in the current session and you are working in a wizard, the following will apply:
    - If the user enters information in the wizard view, clicks the **Next** button and then cancels the wizard, the data defined in the previous wizard view(s) will be saved to the database.
    - If the user enters information in the first wizard view, does NOT click the **Next** button and then cancels the wizard, the data defined in the wizard view will NOT be saved to the database.
  - A report that should be reviewed. Typically this step requires no data entry.
  - A page view that may require data entry or may require a review.
  - An object profile that may require data entry or may require a review.
  - In some cases, the a workflow step may be a system-generated action that does not require user input or user action. Typically, an informational message will be configured by your workflow designer letting the workflow owner or workflow administration know that the workflow step has been executed.
- Carry out the necessary data entry or data review required for the workflow step. The data input that is required for the workflow step may be none or minimal and you may be able to complete the workflow step immediately. Or, the data input that is required may be more extensive and you may need to perform the workflow step over multiple sessions. Please note the following:
  - If the workflow step is based on an editor or wizard, the workflow may automatically advance to the next workflow step once you close the relevant editor or wizard or you may have to


complete the workflow step by clicking the **Confirm**  or **Complete**  button. The **Ready** column will have a checkmark if you must click the **Confirm**  or **Complete**  button to finish your workflow step.

- If the workflow step is based on an object profile, page view, configured report, a **Confirm**  or **Complete**  button will be available. You must click the available button to finish your workflow step.
- If you do not complete the data input required in the current session, any data you have entered in the relevant editor, page view, etc. will be saved. The workflow step will be displayed in the **My Workflow Activities** functionality and will display the value **Pending** in the **Workflow State** column. You can return to the workflow step at any time in the **My Workflow Activities** functionality. To resume definition of the interrupted workflow step, select the workflow step and click the **Perform**  button in the **My Workflow** functionality. The relevant view will open that allows you to continue the definition of the initial workflow step.
- Once you have completed your workflow step, the workflow step will be removed from your **My Workflow Activities** functionality. Depending on the configuration of the workflow step, the workflow may advance to the next workflow step. However, the workflow may also be configured so that all responsible users assigned to the workflow step must complete the step in order for the workflow to advance to the next workflow step.

### Delegating a Workflow Step to Another Alfabet User


If necessary, you can choose to delegate a workflow step to another Alfabet user. You will be required to provide an explanation about why you are delegating the workflow step to the selected user. The selected user will typically be notified via email that the workflow step has been delegated to him/her.

To reassign a workflow step to another Alfabet user:

- 1) Select the workflow step that you want to delegate.
- 2) In the **My Workflow Activities** view, click the **Delegate**  button.
- 3) In the person selector, select the person you want to reassign the responsibility of the workflow step to and click **OK**. The **Delegate Workflow Step** editor opens.
- 4) Define the following fields, as needed:
  - **Substitute All Current Workflow Step Owners:** Select if all users currently responsible for the selected workflow step should be replaced by the user(s) that the workflow step is being delegated to.
  - **Revoke Responsibility from Current User:** Select this checkbox if you want to remove yourself as a user responsible for the workflow step that is being delegated. Clear this checkbox if you to include yourself as a user responsible for the workflow step that is being delegated.

- **Comment:** Provide an explanation about why the workflow is being delegated to another user. The explanation will be displayed in the **Message** column of the **Workflow Step Event Trace** page view.
  - **Delegates:** Click the **Add Person** button to select one or more persons to delegate the workflow step to.
- 5) Click **OK** to save your changes. The responsible user will find the workflow step in the **Workflow Activities Explorer** or **My Workflow Activities** view.

### Refusing a Workflow Step

Depending on the configuration of the workflow step, it may be possible to refuse to perform the workflow step. If it is possible to refuse the workflow step, a **Refuse**  button will be active in the **My Workflow Activities** view or a comparable button will be available in the **Workflow Activities Explorer**. You will be required to provide an explanation about why you are refusing the step. Depending on the configuration of the workflow step:


- A workflow step that is refused may be automatically redirected to another workflow step. As a result, you or other Alfabet users may see a different workflow step in the **Workflow Activities** table that was triggered by the refusal. The relevant user(s) will be notified per email that they are responsible to carry out the workflow step that was triggered by the refusal.
- If a workflow step is refused and no workflow step has been configured to follow the refusal of a workflow step, the state of the workflow will automatically change to `ERROR`. In this case, the workflow owner and workflow administrator will be notified and must manually redirect the workflow to another workflow step.



Please note that the refusal of the workflow step is a means to not perform the workflow step. The refusal to perform a workflow step should not be confused with the rejection of or refusal to approve an object. The rejection of or refusal to approve an object (such as a demand or project) is managed through a release status definition via the **Status** property of the object.

Typically, the configuration of the workflow specifies the subsequent workflow step that should follow if a selected workflow step is refused. If correctly configured, this potential path that the workflow would take will be displayed in the **Workflow Diagram** view. For more information about understanding the workflow diagram, see the section *Viewing the Workflow in the Workflow Diagram*.

To refuse a workflow step:

- 1) Select the workflow step that you want to refuse.
- 2) In the **Workflow Activities** view, click the **Refuse**  button. If you are working in the **Workflow Activities Explorer**, click the relevant button configured by your workflow designer. You will see the **Refuse Workflow Step** editor.
- 3) In the field, enter a comment explaining why you are refusing the workflow step as well as any other information that is important.
- 4) Click **OK**. The workflow step is removed from the **Workflow Activities Explorer** or **Workflow Activities** view.

### Releasing the Lock on a Workflow Step

In some cases, a workflow step may be locked by another user who, for example, is absent in the enterprise but has not defined a proxy. In this case, the lock on the workflow may be removed. Once the lock is removed, the workflow step can be performed or delegated to another user.

To release the lock on a workflow step, select the workflow step in the table and click the **Release**

**Lock**  button in the toolbar.

### Accessing Details about the Current Workflow Step

The **Active Step Activities** page view displays details about the currently selected workflow step.

The following information is displayed:

- **Event:** Displays the action occurring to the workflow step. For a detailed description of all potential values displayed in the **Events** column as well as their meaning, see the section Possible Values in the Events Column for Workflows.
- **Initiator of Action:** Displays the name of the user initiating the event.
- **Affected Users:** Displays the users that are affected by the event.
- **Comment:** Displays either system messages or messages entered by responsible users. If the workflow step is escalated because one or more pre-conditions for the successor step have not been met, you will see the message text configured for the pre-condition.
- **Time Stamp:** Displays the timestamp indicating when the event occurred.

### Accessing Details about the Preceding Workflow Step

The **Activities of Preceding Steps** page view displays details about the workflow step performed prior to the currently selected workflow step.

The following information is displayed:

- **Event:** Displays the action occurring to the workflow step. For a detailed description of all potential values displayed in the **Events** column as well as their meaning, see the section Possible Values in the Events Column for Workflows.
- **Initiator of Action:** Displays the name of the user initiating the event.
- **Affected Users:** Displays the users that are affected by the event.
- **Comment:** Displays either system messages or messages entered by responsible users. If the workflow step is escalated because one or more pre-conditions for the successor step have not been met, you will see the message text configured for the pre-condition.
- **Time Stamp:** Displays the timestamp indicating when the event occurred.



## Performing and Tracking Your Workflow Steps for a Selected Object in the Associated Workflows Page View

The **Associated Workflows** page view displays all workflow steps that target the selected object. You can view the history of the workflow steps associated with the selected object. The report provides an overview of any completed workflow steps that may have impacted the selected object or are currently pending for the object as well as if you have been identified as a user who is responsible for performing the pending workflow step.

Pending workflow steps may be processed in this view. A pending workflow step will be highlighted grey. The toolbar buttons will be disabled for all workflow steps except those that are pending. The following columns are displayed:

- **Caption:** The highest level of the table hierarchy displays the name of the workflow template that the workflow is based on, the second level of the table hierarchy displays the name of the workflow, and the third level of the table hierarchy displays the associated workflow steps. Any workflow steps that are highlighted grey are pending and need to be completed.
- **ID:** Displays the identification number of the corresponding workflow or workflow step.
- **Start Date:** Displays when the workflow step was entered.
- **End Date:** Displays when the workflow step was exited.
- **Workflow State:** Displays whether the state of the workflow step (for example, running, pending, confirmed, etc.)
- **My Pending Activity:** Displays an X if you are the user responsible to complete the workflow step.
- **Current Step Comments:** Displays an X if a comment has been made for the current workflow step. To access the comment, click the workflow step and select **Navigate > Navigate to Activity**. Open the [Active Step Activities Page View](#) to view the comments in the **Message** column.
- **Previous Step Comments:** Displays an X if a comment has been made for the previous workflow step. To access the comment, click the workflow step and select **Navigate > Navigate to Activity**. Open the [Activities of Preceding Steps Page View](#) to view the comments in the **Message** column.
- **Locked By:** Displays the name of the user who is currently working on the workflow step.

You can navigate to the object profile of a completed or pending workflow step. If you navigate to the object profile of a completed workflow step, the view will display the attributes of the workflow step. This view

is ReadOnly. To do so, click the workflow step in the table and click the **Navigate**  button.

## Defining a Proxy to Manage Your Workflow Steps

Because workflow steps must be completed by a specified deadline, it is recommended that you specify alternate persons to take care of your responsibilities in case of a planned absence. The **User's Proxies** page view allows you to define proxies to be responsible for workflow steps generated in the context of a specific workflow template. In this way, you can assign the appropriate person for each workflow context. You should not assign more than one user per workflow template.


During the times that you are absent as specified in the *User's Availability Page View*, each proxy user you have defined will have the necessary access permissions to the workflow steps that he/she is responsible

for via the proxy assignment. Your workflow steps will be accessible in the proxy's **My Workflow Activities** views as well as the **Associated Workflows** page view for the relevant object.



Email notifications will continue to be sent to the original user if the email notification capability has been implemented for the relevant workflow templates. Please note that the proxy user will NOT receive email notifications. A notification monitor can be configured to notify the proxy about the workflow step. For more information, see the section *Defining Notification Monitors* in the reference manual *User and Solution Administration*.

To define a proxy for your workflow steps:

- 1) Navigate to the **Personal Info** functionality and open the **User's Proxies** page view.
- 2) In the toolbar, click the **Add Workflows Proxy**  button. The **Proxy Definition** editor opens.
- 3) In the editor that opens, you will see your user name in the **Person** field. In the **Proxy** field, select the user that you want to assign the responsibility to.
- 4) You will see **Workflows** selected in the **Category** field. In the **Sub-Categories** field, select the workflow template that the workflows are based on that is relevant for the selected proxy. The proxy will only be authorized to view and access workflows steps that are generated in context of the selected workflow template(s).
- 5) Click **OK** to close the editor and save your data.

## Chapter 12: Keeping Track of Objects via Monitors

Alfabet provides a number of different monitors that help your enterprise maintain accurate and up-to-date data. Monitoring allows you to keep track of specified objects for activity (the object has been edited), inactivity (the object has not been edited), or an approaching date (such as an end date). When a monitor is activated, all users defined as listeners to the monitor are automatically sent an email notification. The users defined will be able to access the object that the monitor is about via a hyperlink in the email notification by means of a specified user profile.

Alfabet provides a variety of monitors to alert Alfabet users about changes that have occurred to specific objects which may require further activity, reviews that did not occur as intended, or transactions that were expected to occur. The following monitor types are available in Alfabet.

Monitor Type	Purpose	Example	Details
Activity Monitor	An activity monitor alerts specified users about changes that have been made to specified objects in an object class. The monitor owner must specify a set of attributes that are to be monitored and may specify a set of users that are to be alerted if the monitor is triggered. An email will be sent to the monitor owner and all defined users when the monitor is triggered.	The monitor owner and specified users should be alerted about changes made to the start and end dates of information flows defined for a specific set of applications. In this case, you would define an activity monitor of the type <b>Application</b> with the monitored context <b>Application - Information Flows</b> . You would then define the attributes <b>Start Date</b> and <b>End Date</b> to track.	Created in the <b>Monitors</b> functionality.
Inactivity Monitor	An inactivity monitor alerts the monitor owner and specified users about the absence of activity occurring to specified objects in an object class. The monitor owner must specify a set of objects that are to be monitored and may specify a set of users that are to be alerted if the monitor is triggered. An email will be sent to the monitor owner and all defined users if a specified object is not changed or reviewed within a specified period of time.  The monitor owner can specify the monitor object as reviewed via the <b>Mark as Reviewed</b>  button in the	The monitor owner and specified users should be alerted if no changes are made to an application. Specified applications should be reviewed on a monthly basis. In this case, you would define an inactivity monitor of the type <b>Application</b> with a monthly frequency.	Created in the <b>Monitors</b> functionality.

Monitor Type	Purpose	Example	Details
	object profile of the targeted object.		
Date Monitor	A date monitor allows you to keep track of the approach of a date (start date, end date, target date, etc.) for specified objects or the date of related objects. The monitor owner must specify a set of objects that are to be monitored and may specify a set of users that are to be alerted if the monitor is triggered. An email will be sent to the monitor owner and all defined users when the monitor is triggered.	The monitor owner and specified users should be alerted about the approaching end date of the business supports provided by specific applications. In this case, you would define a date monitor of the type <b>Application</b> with the monitored context <b>Application Business Support</b> . You would then specify that the end date should be tracked.	Created in the <b>Monitors</b> functionality.
System Date Monitor	A system date monitor is a time-triggered monitor for an object class on a system-wide basis. A system date monitor allows you to keep track of the approach of a date for all objects in a specified object class and their related objects (such as an object's start date, end date, target date, etc.).  When a specified date approaches for an object in the object class, an assignment will be generated for the object's authorized user. The authorized user will also receive an email information them of their new assignment.	All users responsible for any application should be alerted about business supports that have an end date later than the applications providing the business support.	Created in the <b>System Date Monitors</b> functionality available via an administrative user profile. For more information about defining system date monitors, see the section <i>Defining System Date Monitors</i> in the reference manual <i>User and Solution Administration</i> .
Consistency Monitor	A consistency monitor supports the system-wide maintenance of objects in the Alfabet database. The consistency monitor is specified to periodically search for inconsistencies among objects. Each consistency monitor is based on an alfabet query or native SQL query that defines the object classes targeted by the query as	Users responsible for an applications should be alerted if an application's lifecycle is to change from the status Plan to the status Production. Such a monitor would ensure that users across the enterprise assess the validity of the status change, thus allowing the enterprise to maintain consistency and accuracy regarding changes	Created in the <b>Consistency Monitors</b> functionality available via an administrative user profile. For more information about defining consistency monitors, see the section <i>Defining Consistency Monitors</i> in the reference manual

Monitor Type	Purpose	Example	Details
	<p>well as the inconsistent attributes to be detected.</p> <p>If an inconsistency is found by the query, an assignment will be generated for the object's authorized user. The authorized user will also receive an email information them of their new assignment. The timely completion of the assignment triggered by a consistency monitor can be tracked by the solution administrator.</p>	to application lifecycle definitions.	<i>User and Solution Administration.</i>
Notification Monitor	<p>A notification monitor allows email notifications to be automatically triggered based on configured Alfabet queries or native SQL queries. The queries specify the objects and attributes that are targeted as well as the users who shall be notified about the objects found by the queries.</p>	Users who have a specified role for applications should be alerted about any new information flows that are created for the applications that they are associated with.	Created in the <b>Notification Monitors</b> functionality available via an administrative user profile. For more information about defining notification monitors, see the section <i>Defining Notification Monitors</i> in the reference manual <i>User and Solution Administration</i> .







Activity, inactivity, and date monitors are created in the **Monitors** functionality, which is described below. The configuration of system date monitors, consistency monitors, and notification monitors is a more involved process that is carried about by a user with an administrative user profile. For more information about configuring system date monitors, consistency monitors, and notification monitors, refer to the reference manual *User and Solution Administration*.

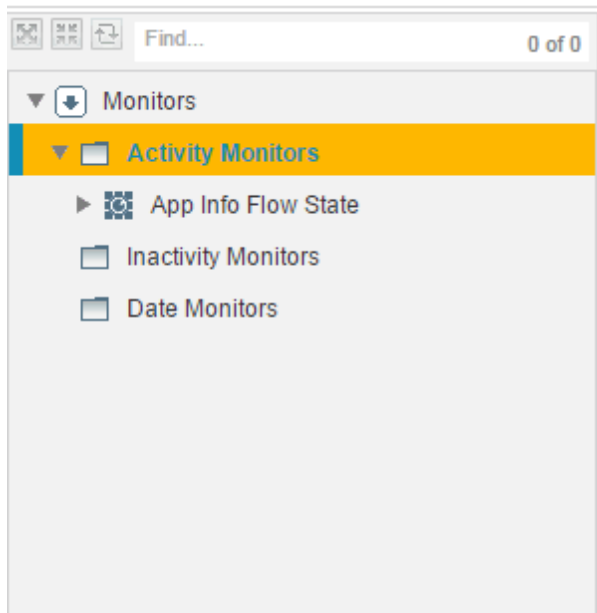





The following must be configured in order to work with monitors in Alfabet:


- In order for any monitor to be executed and email notifications to be sent to relevant users, a batch process must be configured by your system administrator. For more information about setting up a batch process, see the section *Batch Processing for Monitors and Change Management with AlfaBatchExecutor.exe* in the reference manual *System Administration*.
- All Alfabet functionalities for which the email capability is to be implemented require the setup of a connection to an SMTP server for outgoing email in the tool Alfabet Administrator. For more information, see the section *Activating the Dispatch of Email Notifications in Alfabet* in the reference manual *System Administration*.

- Text templates for email notifications may be customized for all monitors in the configuration tool Alfabet Expand. For more information, see *Configuring Monitors* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- For each monitor created, the monitor owner must define the **User Profile to Access Object in Notification** field in the monitor's editor in the relevant monitor functionality in the **Solution Admin** tab that may be accessed via an administrative user profile. This is described for each monitor type in the chapter *Configuring Monitors to Track Objects in Alfabet* in the reference manual *User and Solution Administration*.
- Access permissions must be available for the user profile so that relevant users receiving the email notification can access the relevant objects that are targeted by the hyperlink in the email notification. For more information about the configuration of access permissions, see the section *Configuring Access Permissions for Alfabet* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- All object classes that are to be monitored via activity monitors and inactivity monitors have history tracking enabled in the configuration tool Alfabet Expand and therefore, the **Audit** attribute must be set to `True` for these object classes. Please note that this is not necessary for date, system date, consistency, and notification monitors. These monitors will be implemented even if the **Audit** attribute is set to `False` for the relevant object class. For more information, see the section *Specifying History Tracking for an Object Class* in the chapter *Configuring the Class Model* in the reference manual *Configuring Alfabet with Alfabet Expand*.

The **Monitors** explorer displays the **Activity Monitors**  folder containing all existing activity monitors , the **Inactivity Monitors**  folder containing all existing inactivity monitors , and the **Date Monitors**  folder containing all existing date monitors . You can do any of the following:



- Click the  or  symbol next to the respective folder  to expand or collapse the folder and view the existing monitors.



- Click a folder  to create a new monitor or view the existing monitors in the table to the right. The columns in the table are described below.
  - **ID:** The monitor's identification number
  - **Name:** The monitor's name
  - **Start Date:** The monitor's start date
  - **End Date:** The monitor's end date
  - **Frequency:** The frequency that the monitor is executed
  - **Monitor Type:** The object class whose objects should be monitored. The availability of classes depend on whether the monitor is an activity, inactivity, or date monitor.
  - **Next Execution Date:** The next date that the monitor will be executed. If this monitor has not been executed at all it will be reset to the monitor's start date.
  - **Is Active:** An X indicates that the monitor is activated. If the cell is empty, the monitor is deactivated.

For more information about working with monitors, see:

- [Defining Activity Monitors for Specific Objects](#)
  - [Creating an Activity Monitor](#)
  - [Activating and Deactivating the Activity Monitor](#)
  - [Defining the Objects to be Tracked by an Activity Monitor](#)
  - [Specifying the Users to Be Alerted About the Activity Monitor](#)
- [Defining Inactivity Monitors for Specific Objects](#)
  - [Creating an Inactivity Monitor](#)
  - [Activating and Deactivating the Inactivity Monitor](#)
  - [Defining the Objects to be Tracked by an Inactivity Monitor](#)
  - [Specifying the Users to Be Alerted About the Inactivity Monitor](#)
- [Defining a Date Monitor for Specific Objects](#)
  - [Creating a Date Monitor](#)
  - [Activating and Deactivating the Date Monitor](#)
  - [Defining the Objects to be Tracked by a Date Monitor](#)
  - [Specifying the Users to Be Alerted About the Date Monitor](#)

## Defining Activity Monitors for Specific Objects

An activity monitor is a type of monitor that alerts subscribed users about changes that have been made to objects in a specified object class. The monitor owner must specify a set of properties that are to be monitored and a set of users that are to be alerted if the monitor is triggered. These users as well as the monitor owner will be informed via email notification if a specified attribute for any object in the class is changed. Monitoring is typically performed in regular intervals over a specific period of time.

When you click an activity monitor  in the **Activity Monitors**  folder, you will see the object profile for the selected activity monitor. The section **Attributes** displays the basic information defined for the selected activity monitor. You may see any of the following attributes for the selected activity monitor.

- **ID:** The activity monitor's identification number
- **Name:** The activity monitor's name
- **Start Date:** The activity monitor's start date
- **End Date:** The activity monitor's end date
- **Frequency:** The frequency that the activity monitor is executed
- **Monitor Type:** The object class whose objects should be monitored.
- **Next Execution Date:** The next date that the activity monitor will be executed. If this activity monitor has not been executed at all it will be reset to the monitor's start date.
- **Is Active:** An X indicates that the activity monitor is activated. If the cell is empty, the activity monitor is deactivated.
- **Message Logging:** An X indicates that emails sent in the context of the inactivity monitor will be logged in the **Email Message Log** functionality. If the cell is empty, the no emails will be logged for the inactivity monitor.



In addition to the general requirements for monitors described in the section [Keeping Track of Objects via Monitors](#), the following must be configured in order to work with activity monitors:

- Activity monitors must be enabled in the configuration tool Alfabet Expand. To enable the activity monitor for an object class, the relevant object class must be enabled for auditing and the relevant monitor template must be enabled for monitoring. For more information, see *Configuring Monitors* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- Activity monitors require the definition of monitored contexts, which allow modifications that may occur to different aspects or contexts of objects (such as lifecycles or information flows) to be monitored. The monitor contexts must be enabled for the relevant monitor template in the configuration tool Alfabet Expand. For more information, see *Configuring Monitors* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- For more information about requirements to work with monitors in general, see the section [Keeping Track of Objects via Monitors](#).




To define an activity monitor, you must first create the activity monitor and specify which monitored context and attributes are to be monitored, and then specify the objects that are to be tracked by the monitor and define the users that are to be alerted when the monitor is triggered for one of the specified objects.

The following information is available:

- [Creating an Activity Monitor](#)
- [Activating and Deactivating the Activity Monitor](#)
- [Defining the Objects to be Tracked by an Activity Monitor](#)
- [Specifying the Users to Be Alerted About the Activity Monitor](#)

## Creating an Activity Monitor

You can create an unlimited number of activity monitors. Multiple activity monitors may be defined for the same object class but may monitor different contexts and different objects.

- 1) In the **Monitors** explorer, click the **Activity Monitors**  folder.
- 2) In the Activity Monitors view on the right, click **New > Create New Monitor**. The **Activity Monitor** editor opens.
- 3) Enter information into each field, as required.

### General tab:

- **ID:** Alfabet assigns a unique identification number to each object in the inventory. This number cannot be edited.
- **Name:** Enter a unique name for the activity monitor.
- **Monitor Type:** Select the object class whose objects should be monitored.
- **Monitor Frequency:** Enter the frequency that the activity monitor should be executed. Choices include Daily, Weekly, and Monthly. Weekly monitors are executed on the same day of the week that the activity monitor is created.



For example, a monitor created on Thursday, March 27 will be executed on Thursday, April 3, Thursday, April 10, etc.

- **Start Date:** Enter the activity monitor's start date in the format appropriate to your cultures or select the start date in the calendar. The default date is today's date.
- **End Date:** Enter the activity monitor's end date in the appropriate format or select the end date in the calendar. The default date is one year after today's date.
- **User Profile to Access Object in Notification:** Select the user profile that will be used by the defined listeners to access the monitored object in Alfabet via the hyperlink in the email.



The user profiles displayed include all user profiles assigned to the current user as well as any user profiles defined for anonymous users. For more information about

the definition of user profiles for anonymous users, see *Defining a User Profile for Anonymous Users* in the reference manual *User and Solution Administration*.

#### Monitored Attributes tab:

- **Monitored Context:** Alfabet allows you to monitor modifications that may occur to different aspects or contexts of objects in an object class. Select a context to be monitored. The availability of monitored contexts is configured by your solution designer. Depending on the object class you are monitoring, there may only be one context available. For more information about the meaning of the values listed in the field, see the section *Overview of Monitored Contexts* in the reference manual *Configuring Alfabet with Alfabet Expand - Appendix*.
  - **[field listing attributes]:** Check one or more standard or custom attributes that should be monitored for the objects targeted by the activity monitor. The list of attributes will depend on the monitored context you select.
- 4) Click **OK** to save the monitor or **Cancel** if you do not want to save it



If you delete an activity monitor, it will be irrevocably deleted from the Alfabet database.

## Activating and Deactivating the Activity Monitor

You must activate the activity monitor in order for it to be triggered when the batch process is initiated. To activate an activity monitor, select the relevant activity monitor in the table and click **Monitors > Activate Monitors**. You can simultaneously select multiple monitors by using the key combination CTRL + click to simultaneously select several objects in the table. A checkmark is displayed in the **Is Active** column for all currently active activity monitors.

To deactivate an activity monitor so that it is not triggered when the batch process is initiated, select the relevant activity monitor in the table and click **Monitors > Deactivate Monitors**. The checkmark will be removed from the **Is Active** column.

## Defining the Objects to be Tracked by an Activity Monitor

The **Objects** page view allows you to define specific objects for an activity monitor. The objects that you associate with the activity monitor are the specific objects in Alfabet that are to be tracked by the activity monitor. When the criteria defined in the **Activity Monitor** editor is fulfilled, the activity monitor will be triggered and email notifications will be sent to the users specified as listeners.

To add specific objects to be targeted by the activity monitor:

- 1) Navigate to the object profile of the selected activity monitor and open the **Objects** page view.
- 2) In the toolbar, click **New > Add New Monitor Object**. The object selector opens.
- 3) The object class relevant for the specified monitor type will be selected in the **Search For** field in the object selector. Enter search parameters, as needed.
- 4) Select an object and click **OK**. The object is assigned to the selected monitor.

## Specifying the Users to Be Alerted About the Activity Monitor


The **Listeners** page allows you to define the users that are to be informed via email whenever the selected monitor is triggered. As the creator of the monitor, you are automatically added to the list of listeners. A listener will only be able to edit the object associated with the monitor if he/she has the necessary access permissions to the object targeted by the monitor.




To add the users to be alerted about the monitor:

- 1) Navigate to the object profile of the selected monitor and open the **Listeners** page view.
- 2) In the toolbar, click **New > Add New Listeners**. The object selector opens.
- 3) Enter search parameters, as needed.
- 4) Select one or more users to be alerted when the monitor is triggered and click **OK**. You will see the user's name and email address in the table. When the monitor is triggered, the users will be sent an email notification about the monitored object.

## Defining Inactivity Monitors for Specific Objects

An inactivity monitor is a type of monitor that alerts subscribed users about the absence of activity occurring to objects in a specified object class. The monitor owner must specify a set of objects that are to be monitored and a set of users that are defined as listeners to be alerted if the monitor is triggered. The monitor owner is typically the user responsible for the objects defined for the monitor. The monitor owner as well as the listeners will be informed via email notification if a specified object has not been edited or reviewed within a specified period of time. If the monitored object does not need to be changed, the monitor owner can mark the object as reviewed.

If the monitored object does not need to be changed, the object can be specified as reviewed via the **Mark as Reviewed**  button that is available in the toolbar of most standard object profiles. If an inactivity monitor has been defined for an object, this button can be clicked to indicate that no explicit changes need to be made to the object and that the object has been reviewed. Please note the following about access permissions:

- If the user has ReadWrite permissions to the object and uses the **Mark as Reviewed**  button, then the object is specified as reviewed for **all** inactivity monitors associated with the object, regardless of who owns the inactivity monitor.
- If a user has ReadOnly access permission to the object and uses the **Mark as Reviewed**  button, the object will be specified as reviewed only for the inactivity monitor that the user owns.
- If the user has ReadOnly access permissions to the object and uses the **Mark as Reviewed**  button and no inactivity monitor has been defined for the object, a warning message will be displayed stating that the object is not monitored by an inactivity monitor.

For more information about reviewing an object, see the section [Marking the Object as Reviewed](#).

When you click an inactivity monitor  in the **Inactivity Monitors**  folder, you will see the object profile for the selected inactivity monitor. The section **Attributes** displays the basic information defined for

the selected inactivity monitor. You may see any of the following attributes for the selected inactivity monitor.

- **ID:** The inactivity monitor's identification number
- **Name:** The inactivity monitor's name
- **Start Date:** The inactivity monitor's start date
- **End Date:** The inactivity monitor's end date
- **Frequency:** The frequency that the inactivity monitor is executed
- **Monitor Type:** The object class whose objects should be monitored.
- **Next Execution Date:** The next date that the inactivity monitor will be executed. If this inactivity monitor has not been executed at all it will be reset to the monitor's start date.
- **Is Active:** An X indicates that the inactivity monitor is activated. If the cell is empty, the inactivity monitor is deactivated.
- **Message Logging:** An X indicates that emails sent in the context of the inactivity monitor will be logged in the **Email Message Log** functionality. If the cell is empty, the no emails will be logged for the inactivity monitor.



In addition to the general requirements for monitors described in the section [Keeping Track of Objects via Monitors](#), the following must be configured in order to work with inactivity monitors:

- Inactivity monitors must be enabled in the configuration tool Alfabet Expand. In the case of inactivity monitors, the relevant object class must be enabled for auditing as well as the relevant monitor template must be enabled for monitoring. For more information, see *Configuring Monitors* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- For more information about requirements to work with monitors in general, see the section [Keeping Track of Objects via Monitors](#).

To define an inactivity monitor, you must first create the inactivity monitor and specify the number of days of inactivity that is allowed, and then specify the objects that are to be tracked by the monitor and define the users that are to be alerted when the monitor is triggered for one of the specified objects.

The following information is available:

- [Creating an Inactivity Monitor](#)
- [Activating and Deactivating the Inactivity Monitor](#)
- [Defining the Objects to be Tracked by an Inactivity Monitor](#)
- [Specifying the Users to Be Alerted About the Inactivity Monitor](#)

## Creating an Inactivity Monitor

You can create an unlimited number of inactivity monitors. Multiple inactivity monitors may be defined for the same object class but may monitor different contexts and different objects.

- 1) In the **Monitors** explorer, click the **Inactivity Monitors** folder.
- 2) In the toolbar, click **New > Create New Monitor**. The **Inactivity Monitor** editor opens.
- 3) Edit the fields as needed.
  - **ID:** Alfabet assigns a unique identification number to each object in the inventory. This number cannot be edited.
  - **Name:** Enter a unique name for the inactivity monitor.
  - **Monitor Type:** Select the object class whose objects should be monitored.
  - **Monitor Frequency:** Enter the frequency that the inactivity monitor should be executed. Choices include Daily, Weekly, and Monthly. Weekly monitors are executed on the same day of the week that the monitor is created.



For example, a monitor created on Thursday, March 27 will be executed on Thursday, April 3, Thursday, April 10, etc.

- **Start Date:** Enter the inactivity monitor's start date in the format appropriate to your cultures or select the start date in the calendar. The default date is today's date.
- **End Date:** Enter the inactivity monitor's end date in the appropriate format or select the end date in the calendar. The default date is one year after today's date.
- **Critical Period of Inactivity:** Enter the number of days that inactivity is allowed. An email notification will be generated when this number of days is exceeded.
- **User Profile to Access Object in Email Notification:** Select the user profile that will be used by the defined listeners to access the monitored object in Alfabet via the hyperlink in the email.



The user profiles displayed include all user profiles assigned to the current user as well as any user profiles defined for anonymous users. For more information about the definition of user profiles for anonymous users, see *Defining a User Profile for Anonymous Users* in the reference manual *User and Solution Administration*.

- 4) Click **OK** to save the monitor or **Cancel** if you do not want to save it



If you delete an inactivity monitor, it will be irrevocably deleted from the Alfabet database.

## Activating and Deactivating the Inactivity Monitor

You must activate the inactivity monitor in order for it to be triggered when the batch process is initiated. To activate an inactivity monitor, select the relevant inactivity monitor in the table and click **Monitors > Activate Monitors**. You can simultaneously select multiple monitors by using the key combination CTRL + click to simultaneously select several objects in the table. A checkmark is displayed in the **Is Active** column for all currently active inactivity monitors.

To deactivate an inactivity monitor so that it is not triggered when the batch process is initiated, select the relevant inactivity monitor in the table and click **Monitors > Deactivate Monitors**. The checkmark will be removed from the **Is Active** column.

## Defining the Objects to be Tracked by an Inactivity Monitor

The **Objects** page view allows you to define specific objects for an inactivity monitor. The objects that you associate with the inactivity monitor are the specific objects in Alfabet that are to be tracked by the monitor. When the criteria defined in the **Inactivity Monitor** editor is fulfilled, the inactivity monitor will be triggered and email notifications will be sent to the users specified as listeners.

To add specific objects to be targeted by the inactivity monitor:

- 1) Navigate to the object profile of the selected inactivity monitor and open the **Objects** page view.
- 2) In the toolbar, click **New > Add New Monitor Object**. The object selector opens.
- 3) The object class relevant for the specified monitor type will be selected in the **Search For** field in the object selector. Enter search parameters, as needed.
- 4) Select an object and click **OK**. The object is assigned to the selected monitor.

## Specifying the Users to Be Alerted About the Inactivity Monitor

The **Listeners** page allows you to define the users that are to be informed via email whenever the selected inactivity monitor is triggered. As the creator of the inactivity monitor, you are automatically added to the list of listeners. A listener will only be able to edit the object associated with the inactivity monitor if he/she has the necessary access permissions to the object targeted by the monitor.

To add the users to be alerted about the inactivity monitor:

- 1) Navigate to the object profile of the selected inactivity monitor and open the **Listeners** page view.
- 2) In the toolbar, click **New > Add New Listeners**. The object selector opens.
- 3) Enter search parameters, as needed.
- 4) Select one or more users to be alerted when the inactivity monitor is triggered and click **OK**. You will see the user's name and email address in the table. When the inactivity monitor is triggered, the users will be sent an email notification about the monitored object.



## Defining a Date Monitor for Specific Objects

A date monitor is a type of monitor that alerts subscribed users about approaching dates that have been defined for objects in a specified object class (for example, the approach of an object's start or end date). Two kinds of date monitors are available in Alfabet: object-specific date monitors and system-wide date monitors that target all objects in a specified object class.

Object-specific date monitors are defined by an individual user to keep track of the approach of a date for specified objects. The monitor owner must specify a set of properties that are to be monitored and a set of users that are to be alerted if the monitor is triggered. These users as well as the monitor owner are

informed when the target date approaches for the specified attribute and can then decide upon the appropriate action to take. Monitoring is performed in regular intervals over a specified period of time.

In addition to the conventional Alfabet date monitors, system-wide defined date monitors can be configured for an object class. When a specified date approaches, all authorized users responsible for objects in the relevant object class will be sent notifications per email asking them to review the objects that they are responsible for.

When you click a date monitor  in the **Date Monitors**  folder, you will see the object profile for the selected date monitor. The section **Attributes** displays the basic information defined for the selected date monitor. You may see any of the following attributes for the selected date monitor.

- **ID:** The date monitor's identification number
- **Name:** The date monitor's name
- **Start Date:** The date monitor's start date
- **End Date:** The date monitor's end date
- **Frequency:** The frequency that the date monitor is executed
- **Monitor Type:** The object class whose objects should be monitored.
- **Next Execution Date:** The next date that the date monitor will be executed. If this date monitor has not been executed at all it will be reset to the monitor's start date.
- **Is Active:** An X indicates that the date monitor is activated. If the cell is empty, the date monitor is deactivated.
- **Message Logging:** An X indicates that emails sent in the context of the date monitor will be logged in the **Email Message Log** functionality. If the cell is empty, the no emails will be logged for the date monitor.



In addition to the general requirements for monitors described in the section [Keeping Track of Objects via Monitors](#), the following must be configured in order to work with date monitors:

- Date monitors require the definition of monitored contexts, which allow modifications that may occur to different aspects or contexts of objects (such as lifecycles or information flows) to be monitored. The monitor contexts must be enabled for the relevant monitor template in the configuration tool Alfabet Expand. For more information, see *Configuring Monitors* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- For more information about requirements to work with monitors in general, see the section [Keeping Track of Objects via Monitors](#).
- For more information about configuring system-wide date monitors, see the section *Defining System Date Monitors* in the reference manual *User and Solution Administration*.


To define a date monitor, you must first create the date monitor and specify which monitored context and attributes are to be monitored, and then specify the objects that are to be tracked by the monitor and define the users that are to be alerted when the monitor is triggered for one of the specified objects.

The following information is available:

- [Creating a Date Monitor](#)
- [Activating and Deactivating the Date Monitor](#)
- [Defining the Objects to be Tracked by a Date Monitor](#)
- [Specifying the Users to Be Alerted About the Date Monitor](#)

## Creating a Date Monitor

You can create multiple date monitors.

- 1) In the **Monitors** explorer, click the **Date Monitors**  folder.
- 2) In the toolbar, click **New > Create New Monitor**. The **Date Monitor** editor opens.
- 3) Enter information into each field, as required.

### General tab:

- **ID:** Alfabet assigns a unique identification number to each object in the inventory. This number cannot be edited.
- **Name:** Enter a unique name for the date monitor.
- **Monitor Type:** Select the object class whose objects should be monitored.
- **Monitor Frequency:** Enter the frequency that the date monitor should be executed. Choices include Daily, Weekly, and Monthly. Weekly monitors are executed on the same day of the week that the monitor is created.



For example, a monitor created on Thursday, March 27 will be executed on Thursday, April 3, Thursday, April 10, etc.

- **Start Date:** Enter the date monitor's start date in the format appropriate to your cultures or select the start date in the calendar. The current date is the default.
- **End Date:** Enter the date monitor's end date in the appropriate format or select the end date in the calendar. One year after the current date is the default.
- **Alert Period:** Enter the number of days before (positive value) or after (negative value) the defined date attribute that an email notification should be generated.
- **User Profile to Access Object in Notification:** Select the user profile that will be used by listeners to access the object in Alfabet via the hyperlink in the monitor's notification email.



The user profiles displayed include all user profiles assigned to the current user as well as any user profiles defined for anonymous users. For more information about the definition of user profiles for anonymous users, see *Defining a User Profile for Anonymous Users* in the reference manual *User and Solution Administration*.

### Monitored Attributes tab:



- **Monitored Context:** Alfabet allows you to monitor modifications that may occur to different aspects or contexts of objects in an object class. Select a context to be monitored. The availability of monitored contexts is configured by your solution designer. Depending on the object class you are monitoring, there may only be one context available. For more information about the meaning of the values listed in the field, see the section *Overview of Monitored Contexts* in the reference manual *Configuring Alfabet with Alfabet Expand - Appendix*.
  - **[field listing attributes]:** Check one or more standard or custom attributes that should be monitored for the objects targeted by the date monitor. The list of attributes will depend on the monitored context you select.
- 4) Click **OK** to save the monitor or **Cancel** if you do not want to save it



If you delete a date monitor, it will be irrevocably deleted from the Alfabet database.

## Activating and Deactivating the Date Monitor

You must activate the date monitor in order for it to be triggered when the batch process is initiated. To activate a date monitor, select the relevant date monitor in the table and click **Monitors > Activate Monitors**. You can simultaneously select multiple monitors by using the key combination CTRL + click to simultaneously select several objects in the table. A checkmark is displayed in the **Is Active** column for all currently active date monitors.

To deactivate a date monitor so that it is not triggered when the batch process is initiated, select the relevant date monitor in the table and click **Monitors > Deactivate Monitors**. The checkmark will be removed from the **Is Active** column.

## Defining the Objects to be Tracked by a Date Monitor

The **Objects** page view allows you to define specific objects for a date monitor. The objects that you associate with the date monitor are the specific objects in Alfabet that are to be tracked by the monitor. When the criteria defined in the **Date Monitor** editor is fulfilled, the date monitor will be triggered and email notifications will be sent to the users specified as listeners.

To add specific objects to be targeted by the date monitor:

- 1) Navigate to the object profile of the selected date monitor and open the **Objects** page view.
- 2) In the toolbar, click **New > Add New Monitor Object**. The object selector opens.
- 3) The object class relevant for the specified monitor type will be selected in the **Search For** field in the object selector. Enter search parameters, as needed.
- 4) Select an object and click **OK**. The object is assigned to the selected monitor.

## Specifying the Users to Be Alerted About the Date Monitor

The **Listeners** page allows you to define the users that are to be informed via email whenever the selected date monitor is triggered. As the creator of the date monitor, you are automatically added to the list of listeners. A listener will only be able to edit the object associated with the date monitor if he/she has the necessary access permissions to the object targeted by the monitor.

To add the users to be alerted about the date monitor:

- 1) Navigate to the object profile of the selected date monitor and open the **Listeners** page view.
- 2) In the toolbar, click **New > Add New Listeners**. The object selector opens.
- 3) Enter search parameters, as needed.
- 4) Select one or more users to be alerted when the date monitor is triggered and click **OK**. You will see the user's name and email address in the table. When the date monitor is triggered, the users will be sent an email notification about the monitored object.

## Chapter 13: Creating a Splash Screen As Your Start Page

A splash screen capability is available that allows with read-only and read-write access permission to create a personal start page that consists of the views that you work with most often. This could include, for example, standard page views, configured reports, and analytic dashboards. An object profile or object cockpit cannot be added to the splash screen. The splash screen you create can be displayed instead of the start page configured by your enterprise upon login to Alfabet. If your enterprise has configured a guide

page, a drop-down menu will be added to the **Start Page**  button in the main toolbar that allows you to select either the splash screen or the guide view.

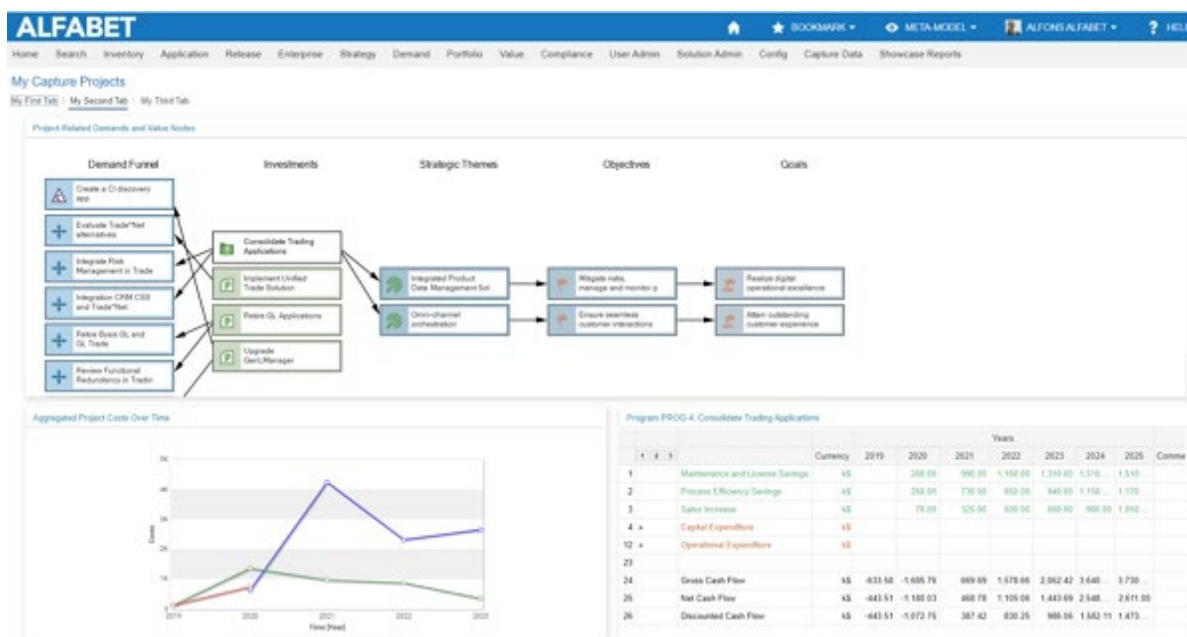
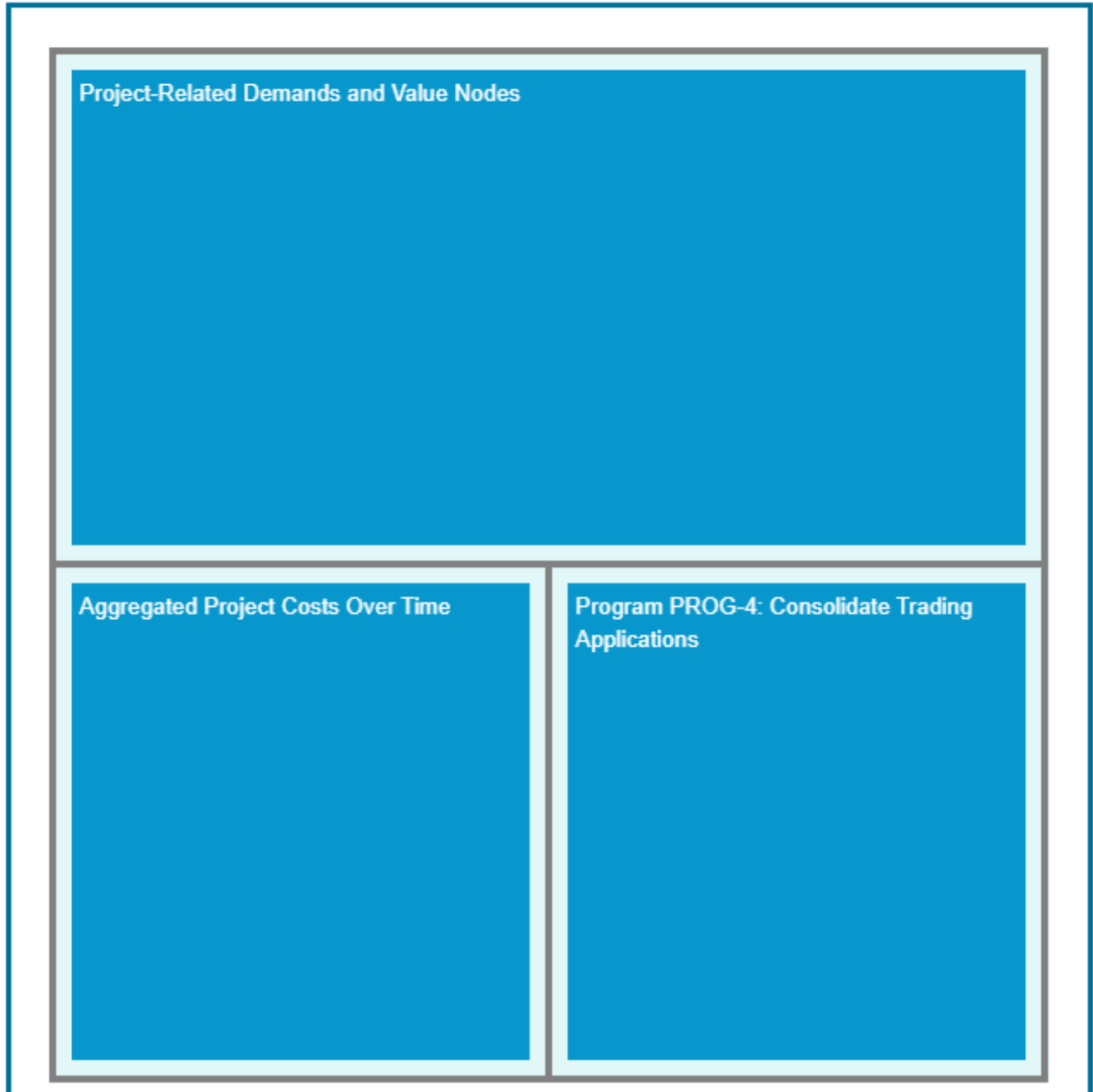


FIGURE: Example of a splash screen

A splash screen may contain multiple tabs, each containing one or more views in a table layout structure. You can specify the size and placement of the views in a tab by defining a table layout to determine how the views are placed in the layout. In this way, you can determine that some views take up more space vertically and horizontally than others. Each tab may have a different table layout.



*FIGURE: Table layout in the Splash Screen editor*

For example, in table layout with 2 columns and 4 rows, the column span of one view might be 2 and the row span 2, and two other views may be positioned below the rows with the first view and have a column span of 1 and a row span of 2.

Furthermore, you can specify the captions to display for the tabs and views.



The following must be completed in order to view the splash screen in the Alfabet user interface:

- The **Enable Splash Screen** option in the **User Settings** editor must be enabled in order to display the **Edit Splash Screen** option in the **Bookmark** menu. A splash screen cannot be created if this option is not enabled.
- The **Active** attribute available in the **Splash Screen** editor must be set to `True`.

To specify a splash screen as your personal start page

- 1) Navigate to a view that you want to add to your splash screen and in the **Bookmark** menu in the main toolbar, click **Edit Splash Screen**.



The splash screen capability is only available for views that may be bookmarked. For example, bookmarks cannot be created for specific administrative functionalities as well as custom object views, page views, and configured reports for which the solution designer has set the **Can Create Bookmark** attribute to `True`. If a view may not be bookmarked, the **Create Bookmark** option in the **Bookmark** menu in the main toolbar will be disabled.

- 2) The **Splash Screen Editor** opens. The entire splash screen is in focus, evident by the outermost blue border, and displays a default table. First, define the following general attributes for the splash screen:
  - **Caption:** Define a caption for the splash screen. The caption will be displayed as the title of the splash screen in the Alfabet user interface.
  - **Active.** Select the checkbox to activate the splash screen and make it visible in the Alfabet user interface. You should activate the splash screen immediately so that you can test the display as you are defining it. Once activated, the splash screen will be displayed as your start page and will override any other configured start page defined by your enterprise.
  - **Ignore Common Container Skin:** Per default, this attribute is set to `False` (no checkmark is set) and the skin styles such as margins, borders padding, and box shadowing specified via the **Common Container Skin** attributes in the GUI scheme are applied. Select the the skin styles such as margins, borders padding, and box shadowing are specified via the **Common Container Skin** attribute in the GUI scheme. Check the **Ignore Common Container Skin** checkbox if no skin styles configured for the user profile should be used to display the content. In this case, the content is displayed in a simple grid layout. For more information about configuring GUI schemes, see the section *Configuring GUI Scheme Definitions for the Alfabet Interface* in the reference manual *Configuring Alfabet with Alfabet Expand*
- 3) Next, you must create tabbed pages in order to add views to the splash screen. Click the **Create Tab Page** button. Two tabs will be automatically displayed. Please note that if you don't require two tabbed pages, you can delete one by clicking the outer border of the tabbed page to place the focus on it and clicking the **Delete** button.
- 4) Select the tab you want to specify in the **Pages** drop-down men and define the following:
  - **Caption:** Enter a caption if for the tabbed page. This is necessary if you plan to specify multiple tabbed pages..
  - **Table Layout:** The default table layout is set to 6x8 (rows x columns). Enter the number of rows and the number of columns for the layout of the tabbed page. When you add views to the table layout, you will be able to specify that a view stretches horizontally across more than one row and vertically across more than one column. In other words, if views of different sizes shall be displayed in the splash screen, then you should consider the amount of space in the table that the individual views require in relation to each other. In the images above, the

**Table Layout** is specified with the value 4x2. The splash screen contains three views with one view filling 2 rows and 2 columns, and 2 other views, each filling 2 rows and 1 column.

5) To add the current view to the splash screen, click the **Add Current View** button. The view will be added to the first tabbed page. You can further refine the size and position of the view in the table layout specified. You can drag-and-drop the view and move it to another cell in the table.

- **Caption:** Enter a caption for the tab, if necessary.
- **Column Span:** Specify the number of columns in the table layout that the view should span.
- **Row Span:** Specify the number of rows in the table layout that the view should span.
- **Left:** Specify the column cell in the table grid where you want to place the view. The first column = 0, the next column = 1, etc.
- **Top:** Specify the row cell in the table grid where you want to place the view. The first row = 0, the next row = 1, etc.

6) Click **OK** to save the view definition in the tabbed page of the splash screen. The **Splash Screen Editor** will close. You can check the layout of the splash screen by clicking the **Start**

**Page**  button.

7) To add another view to the tabbed page, navigate to the view in the Alfabet user interface and click **Bookmark > Edit Splash Screen**. In the **Splash Screen** editor, click the **Add Current View** button and report the procedure described above. Repeat until all views have been added to the tabbed page.

8) To add another tabbed page to the splash screen, click **Bookmark > Edit Splash Screen**. In the **Splash Screen** editor, click the **Create Tab Page** button. Specify the **Caption** and **Table Layout** attributes as explained above and add views as needed. You can create multiple tabbed pages as needed.

9) Please note the following:

- To delete a tabbed page, click the outer border of the tabbed page to place the focus on it and click the **Delete** button.
- To delete a view in a tabbed page, click the view to place the focus on it and click the **Delete** button.
- To completely remove the splash screen, click outside of the outer border of the tabbed page to place the focus on the splash screen and clear the **Active** checkbox.

## Chapter 14: Designing, Sharing, and Viewing Analytics Dashboards

Alfabet provides analytics dashboards that are designed based on the embedded third-party tool DevExpress® Dashboard. Analytics dashboards support end users to create ad-hoc information-rich data visualizations. Users can use the full-range of visualization possibilities available in the DevExpress Dashboard Designer. One or more dashboard items such as charts, scatter charts, grids, cards, gauges, pivots, range maps, treemaps, etc. can be added to the analytics dashboard and filtering options such as combo-boxes, list boxes, and tree views can be leveraged.



For example, an analytics dashboard has been designed application analysis in the enterprise. The analytics dashboard displays a list of application groups and applications to filter the data, pie charts visualizing the count of applications per release status and object state, and a portfolio chart show the applications based on their business value and adaptability.

Analytics dashboards can be shared with other users and the designer of an analytics dashboard may specify which users have authorization to edit the analytics dashboard and which users may only view it. Authorized users as well as users in authorized user groups will jointly manage and edit an analytics dashboard. Access to the analytics dashboard may also be granted to specified users, users in specified user groups, and users with a specified user profile. These users will only be able to view the analytics dashboard.

Navigation to objects displayed in the analytics dashboard is supported. To navigate to an object displayed in an analytics dashboard, click and hold the pointer on an object in the analytics dashboard to open the preview and click the **Show Details** button to open the object profile or object cockpit of the object. The analytics dashboard can also be exported to a PDF file, shared as an express view, and embedded in a guide view or splash screen.



To create an analytics dashboard, the following steps are required:

- An analytics dashboard must be created in the **Analytics Dashboards** explorer. An analytics dashboard data provider configured by your enterprise must be assigned to the analytics dashboard in order to fetch the data to be displayed.



Analytics dashboard data providers must first be configured in the **Analytics Dashboard Data Provider** view in the **Integration Solutions Configuration** functionality in order to fetch the data from the Alfabet database that will be displayed in the analytics dashboard. For more information, see the section *Specifying Analytics Dashboard Data Providers* in the reference manual *Configuring Evaluation and Reference Data in Alfabet*.

- The analytics dashboard must be designed via the Dashboard Designer provided by the third-party tool DevExpress® Dashboard.



The following link provides samples of DevExpress dashboards: <https://demos.devexpress.com/Dashboard/>. Please note that this documentation addresses only the use of Alfabet -specific functionalities. For more information about how to design the analytics dashboard in the context of the Dashboard Designer, see the following documentation available for DevExpress® Dashboard: <https://devexpress.github.io/dotnet-eud/dashboard-for-web/articles/web-dashboard-designer-mode.html>

- The analytics dashboard may be shared with other users who may view the analytics dashboard but may not edit. User access can be explicitly defined for specified users or define via a user group or user profile affiliation.



Analytics dashboards that are jointly managed may be edited by the authorized user as well as members of authorized user groups that have been defined for the diagram.

The following information is available:

- [Creating an Analytics Dashboard](#)
- [Designing the Analytics Dashboard](#)
- [Assigning Other Users Read-Only Access to the Analytics Dashboard](#)
- [Assigning User Profiles Read-Only Access to the Analytics Dashboard](#)
- [Assigning User Groups Read-Only Access to the Analytics Dashboard](#)

## Creating an Analytics Dashboard

The **Analytics Dashboards** functionality allows you to create new dashboards as well as navigate to the views in which access permissions can be defined for other users, user groups, and user profiles. The **Analytics Dashboards** explorer contains the following nodes:

- **My Analytics Dashboards:** This node contains all analytics dashboards that you are the authorized user of.
  - Expand this node to display all analytics dashboards that you have created.
  - Click this node to open the view that allows you to create new analytics dashboards and edit the analytics dashboards that you are the authorized user of.
  - Click an analytics dashboard to open the Dashboard Designer in order to design the visualization of the data in the analytics dashboard.
- **Jointly Managed Analytics Dashboards:** This node contains all analytics dashboards that you may edit based on your membership in an authorized user group that has been defined as responsible for the analytics dashboard.
  - Expand this node to display all analytics dashboards that you may edit as a member of an authorized user group.
  - Click this node to open the view that allows you to edit the analytics dashboards that you jointly manage.
  - Click an analytics dashboard to open the Dashboard Designer in order to design the visualization of the data in the analytics dashboard that you jointly manage.
- **Shared Analytics Dashboards:** This node contains all analytics dashboards that you have read-only access permissions to because the owner(s) of the analytics dashboards have explicitly provided permissions to you as a user, a member of a user group, or a user assigned a specified user profile.



- **Analytics Dashboards Shared with Me:** Expand this node to view all analytics dashboards that have been shared with you.
- **Analytics Dashboards Shared with My User Groups:** Expand this node to view all analytics dashboards that have been shared with one or more users groups that you are a member of.
- **Analytics Dashboards Shared with My User Profile:** Expand this node to view all analytics dashboards that have been shared with your user profile.

To create an analytics dashboard:

- 1) In the **Analytics Dashboards** explorer, click the **My Analytics Dashboards** node.
- 2) In the view on the right, click **New > Create an Analytics Dashboard**.
- 3) In the **Analytics Dashboard** editor, define the following:

#### Basic Data tab:

- **ID:** Displays the automatically-generated unique identification number for the analytics dashboard.
- **Name:** Enter a name for the analytics dashboard.
- **Release Status:** Select the analytics dashboard's current release status.



The set of release statuses available for an object class are configured by your solution designer in the configuration tool Alfabet Expand. For more information, see the section *Configuring Release Status Definitions for Object Classes* in the reference manual *Configuring Alfabet with Alfabet Expand*. For general information about release statuses, see the section [Understanding Release Statuses](#) in the reference manual *Getting Started with Alfabet*.

- **Description:** Project a meaningful explanation about the purpose of the analytics dashboard.
- **Analytics Dashboard Data Provider:** Select the analytics dashboard data provider that will find the data to display in the analytics dashboard.



The analytics dashboard data provider is configured in order to fetch the data from the Alfabet database that will be displayed. This is carried out in the **Analytics Dashboard Data Provider** view in the **Integration Solutions Configuration** functionality. For more information, see the section *Specifying Analytics Dashboard Data Providers* in the reference manual *Configuring Evaluation and Reference Data in Alfabet*.

- **Analytics Dashboard Data Provider Description:** Displays the description provided for the analytics dashboard data provider.

#### Authorized Access tab:



The visibility of an analytics dashboard in the **Analytics Dashboards** explorer mainly depends on the specification of the authorized user and authorized user groups in the editor of the analytics dashboard. A check for authorization data will be executed to ensure that an analytics dashboard will not be hidden from the explorer after creation because no authorized user or authorized user group has been defined in the editor or wizard. If an authorized user is not defined, you will not be able to close the editor and a message about the missing settings will be displayed.

- **Authorized User:** Click the **Search** icon to assign an authorized user to the selected analytics dashboard. The authorized user will have Read/Write access permissions for the analytics dashboard and is responsible for the maintenance of the analytics dashboard. The authorized user can access the analytics dashboard in the **My Analytics Dashboards** node in the **Analytics Dashboards** explorer.
  - **Authorized User Groups:** Select one or more checkboxes to assign Read/Write access permissions to all users in the selected user group(s). All users in the selected user groups can access the analytics dashboard in the **Jointly Managed Analytics Dashboards** node in the **Analytics Dashboards** explorer.
- 4) Click **OK** to save your changes or click **Cancel** to exit without saving.

## Designing the Analytics Dashboard

Analytics dashboards can be designed to provide ad-hoc information-rich data visualizations. The analytics dashboard object must be created in Alfabet as described in the section [Creating an Analytics Dashboard](#) and the Alfabet data to display in the analytics dashboard is fetched via the analytics dashboard data provider specified for the analytics dashboard.

The visualization of the data in the analytics dashboard is then designed in the DevExpress Dashboard Designer available via the embedded third-party tool DevExpress® Dashboard. You may design the visualization of the analytics dashboards that you have created as well as the analytics dashboards that you may edit, which are stored below the **Jointly Managed Analytics Dashboards** node. You can use the full-range of visualization possibilities available in the DevExpress Dashboard Designer. One or more dashboard items such as charts, scatter charts, grids, cards, gauges, pivots, range maps, treemaps, etc. can be added to the analytics dashboard and filtering options such as combo-boxes, list boxes, and tree views can be leveraged.





Please note that this documentation addresses only the use of Alfabet-specific functionalities. For more information about how to design the analytics dashboard in the context of the Dashboard Designer, see the following documentation available for DevExpress® Dashboard: <https://devexpress.github.io/dotnet-eud/dashboard-for-web/articles/web-dashboard-designer-mode.html> The following link provides samples of DevExpress dashboards: <https://devexpress.github.io/dotnet-eud/dashboard-for-web/articles/web-dashboard-design>



To design the analytics dashboard:

- 1) In the **Analytics Dashboards** explorer, expand either the **My Analytics Dashboards** node or the **Jointly Managed Analytics Dashboards** node.
- 2) In the **Analytics Dashboards** explorer, click the analytics dashboard that you want to design. The analytics dashboard is displayed on the right in view mode.



To edit the analytics dashboard object, click the **Edit**  button. For more information about editing the analytics dashboard, see the section [Creating an Analytics Dashboard](#).


- 3) Click the **Configure Mode**  button in the toolbar to open the **Analytics Dashboard Designer**. For each analytics dashboard, you can:

- Use the dashboard menu to define a name for the dashboard, view the data sources, specify the currency, etc. Please note that the currency definition is independent of the currency configured in the Alfabet data.
  - Use the toolbox items pane to add dashboard items such as charts, scatter charts, grids, cards, gauges, pivots, range maps, treemap.
  - Bind the data fetched by the analytics dashboard data provider to the dashboard items.
  - Specify filters for the data displayed in the analytics dashboard.
- 4) Click the **Save Configuration**  button to save the visualization of the analytics dashboard.
  - 5) Click the **View Mode**  button to view the visualization of the analytics dashboard.

## Assigning Other Users Read-Only Access to the Analytics Dashboard

If a user is assigned permissions to an analytics dashboard, the analytics dashboard will be available in the **Analytics Dashboards Shared with Me** node in the **Analytics Dashboards** explorer for the specified users. These users will be able to view but not edit the analytics dashboard.

To assign users read-only access permissions to the analytics dashboard:

- 1) In the **Analytics Dashboards** explorer, click either the **My Analytics Dashboards** node or the **Jointly Managed Analytics Dashboards** node to view the analytics dashboards that you are an authorized user of.
- 2) In the table, select the analytics dashboard that you want to provide one or more user(s) access to and click the **Navigate**  button.
- 3) Click **User Access to Analytics Dashboard** to open the view.
- 4) Click the **Add Users** button to open the person selector.
- 5) Select one or more users that you want to provide read-only access to and click **OK**.


## Assigning User Profiles Read-Only Access to the Analytics Dashboard

The **User Profile Access to Analytics Dashboard** page view allows users with edit permissions to an analytics dashboard to change the access permissions of the analytics dashboard. If a user profile is assigned permissions to an analytics dashboard, the analytics dashboard will be available in the **Analytics Dashboards Shared with My User Profiles** node in the **Analytics Dashboards** explorer for all users logged in with the user profile. Users with the user profile assigned will be able to view but not edit the analytics dashboard.

The table displays all user profiles that have read-only access to the selected analytics dashboard. The following columns are displayed:

- **User Profile:** Displays the name of the user profile.
- **Administrative:** Indicates whether the user profile is an administrative user profile and has access to standard administrative views in Alfabet as well as all configured reports specified as administrative.
- **Has Access:** Indicates whether the user profile has read-only access to the analytics dashboard.

To assign one or more user profiles read-only access permissions to the analytics dashboard:

- 1) In the **Analytics Dashboards** explorer, click either the **My Analytics Dashboards** node or the **Jointly Managed Analytics Dashboards** node to view the analytics dashboards that you are an authorized user of.
- 2) In the table, select the analytics dashboard that you want to provide one or more user(s) access to and click the **Navigate**  button.
- 3) Click **User Profile Access to Analytics Dashboard** to open the view.
- 4) To provide a user profile with access to the analytics dashboard, select the relevant user profile in the dataset and click the **Grant Access** button. A checkmark will be displayed in the **Has Access** column for each user profile that has been granted access to the analytics dashboard.
- 5) To remove access from a user profile to the analytics dashboard, select the relevant user profile in the dataset and click the **Revoke Access** button. The checkmark will be removed from the **Has Access** column for the user profile.

## Assigning User Groups Read-Only Access to the Analytics Dashboard

The **User Group Access to Analytics Dashboard** page view allows users with edit permissions to an analytics dashboard to change the access permissions of the analytics dashboard. If a user group is assigned permissions to an analytics dashboard, the analytics dashboard will be available in the **Analytics Dashboards Shared with My User Groups** node in the **Analytics Dashboards** explorer for all users that are members of the user group. Users belonging to the user group will be able to view but not edit the analytics dashboard.




User groups defined as authorized user groups in the **Authorized Access** tab in the **Analytics Dashboard** editor will have edit access permissions to the analytics dashboard. In this case, the analytics dashboard will be available in the **Jointly Managed Analytics Dashboards** node in the **Analytics Dashboards** explorer.

The table displays all user groups that have read-only access to the selected analytics dashboard. The following columns are displayed:

- **User Group:** Displays the name of the user group.
- **Has Access:** Indicates whether the user group has read-only access to the analytics dashboard.

To assign one or more user groups read-only access permissions to the analytics dashboard:

- 1) In the **Analytics Dashboards** explorer, click either the **My Analytics Dashboards** node or the **Jointly Managed Analytics Dashboards** node to view the analytics dashboards that you are an authorized user of.
- 2) In the table, select the analytics dashboard that you want to provide one or more user groups access to and click the **Navigate**  button.
- 3) Click **User Group Access to Analytics Dashboard** to open the view.
- 4) To provide a user group with access to the analytics dashboard, select the relevant user group in the dataset and click the **Grant Access** button. A checkmark will be displayed in the **Has Access** column for each user group that has been granted access to the analytics dashboard.
- 5) To remove access from a user group to the analytics dashboard, select the relevant user group in the dataset and click the **Revoke Access** button. The checkmark will be removed from the **Has Access** column for the user group.

## Chapter 15: Defining and Navigating with Your Corporate Frameworks

A framework is a means to define a semantic structure for objects managed in Alfabet, regardless of the object class that an object belongs to. In Alfabet, a framework is a hierarchically structured collection of framework groups in which a user can navigate through the levels of the framework structure.

Alfabet provides the **Corporate Framework Designer** functionality that allows you to create and design framework diagrams and reference models. Users can navigate the diagrams and access data within the context of the framework or reference model. For example, you could configure a standard framework like Zachmann or TOGAF® or a reference model that is domain specific, such as a business architecture with its business data and usage or a warehouse management system and its technical components.

A framework in this context is a placeholder to model and present your objects in a specific structure that may be different from the structure of your inventory objects in Alfabet. The framework is merely used as for purposes of visualization and presentation.

The framework diagrams can be viewed by users in the **Corporate Frameworks** functionality. They are typically viewed by a large number of users that may have no direct access to the inventory of objects in Alfabet.

The following information is available:

- [Designing Framework Diagrams and Reference Models](#)
  - [Creating a Framework Group](#)
  - [Assigning Objects to the Framework Group](#)
  - [Defining Subordinate Framework Groups](#)
    - [Adding an Existing Sub-Group](#)
    - [Removing a Sub-Group](#)
    - [Deleting a Sub-Group](#)
  - [Designing the Navigation Diagram for a Framework Group](#)
- [Working with Corporate Frameworks in Alfabet](#)

### Designing Framework Diagrams and Reference Models

The **Corporate Framework Designer** allows you to create and design framework diagrams and reference models. Users can navigate the diagrams and access data within the context of the framework or reference model. For example, you could configure a standard framework like Zachmann or TOGAF® or a reference model that is domain specific, such as a business architecture with its business data and usage or a warehouse management system and its technical components.

A framework in this context is a placeholder to model and present your objects in a specific structure that may be different from the structure of your inventory objects in Alfabet. The framework is merely used as for purposes of visualization and presentation. The framework diagrams created by a framework designer are typically viewed by a large number of users that may have no direct access to the inventory of objects in Alfabet.

A framework group is a container to structure objects from different object classes in order to view, analyze, and communicate the company's enterprise architecture.

The **Corporate Framework Designer** functionality allows you to:

- Define framework groups at the top-level of the explorer. You can create an unlimited number of subordinate framework groups for each root-level framework group.
- Assign an unlimited number of sub-groups and objects to framework groups. You may view the details of all objects that you assign to the framework diagram. However, framework objects cannot be edited in the context of the **Corporate Framework Designer** functionality.
- Define the visualization of the framework diagram. You can test the framework diagram that you create here in the **Corporate Frameworks** functionality. For more information, see [Working with Corporate Frameworks in Alfabet](#).


Users can view the framework groups in the **Corporate Frameworks** functionality.

The following information is available.

- [Creating a Framework Group](#)
- [Assigning Objects to the Framework Group](#)
- [Defining Subordinate Framework Groups](#)
  - [Adding an Existing Sub-Group](#)
  - [Removing a Sub-Group](#)
  - [Deleting a Sub-Group](#)
- [Designing the Navigation Diagram for a Framework Group](#)

## Creating a Framework Group

To create a new framework group at the top-level of the explorer structure:

- 1) In the **Corporate Framework Designer** functionality, click the **Corporate Framework Designer** icon  at the top of the explorer.
- 2) In the toolbar, click **New > Create New Framework Group**. The **Framework Group** editor opens.
- 3) Enter information into each field, as required.

### **Basic Data** tab:

- **ID:** Alfabet assigns a unique identification number to each object in the inventory. This number cannot be edited.
- **Name:** Enter a unique name for the framework group.
- **Description:** Enter a meaningful description that will clarify the purpose of the framework group.
- **Show Text:** Enter the text to be visualized on the diagram item in the framework diagram.

**Authorized Access** tab:

- **Authorized User:** Click the **Search** icon to assign an authorized user to the selected object. The authorized user will have Read/Write access permissions to the object and is authorized to maintain the object in Alfabet.
  - **Authorized User Groups:** Select the checkbox to assign Read/Write access permissions to all users in the selected user group. For more detailed information about the concept of access permissions, see the section [Understanding Access Permissions in Alfabet](#) in the reference manual *Getting Started with Alfabet*.
- 4) Click **OK** to save the framework group or **Cancel** if you do not want to save it.



If you delete an object in the object class Framework Group, it will be irrevocably deleted from the Alfabet database. If any of the following dependent objects or data is defined for the deleted object, these will also be deleted: Assignment, Attachment, Deputy, Evaluation, Role.

## Assigning Objects to the Framework Group

A framework group groups object classes that share a specific context. The **Objects** page view allows you to assign an unlimited number of objects to a framework group. You can also group objects from different classes together.

The **Objects** page view displays all objects that have been assigned to the framework group. The objects are organized according to object class. You cannot edit the details of an object in the **Objects** page view. Each column in the table is defined below:

- **Name:** Displays the object's name.
- **State:** Displays the object's state

To add existing objects to a framework group:

- 1) Go to the selected framework group's profile and click **Objects**.
- 2) In the toolbar, click **New > Add Existing Objects**.
- 3) The object selector opens. Enter search criteria, as needed, and click **Search**.
- 4) Click the object and click **OK**. The object appears in the table.

## Defining Subordinate Framework Groups

The **Subordinate Framework Groups** page view allows you to create sub-groups for a selected framework group. A framework group can have an unlimited number of sub-groups as well as an unlimited number of levels in the tree structure.

The **Subordinate Framework Groups** page view displays the subordinate groups that have been defined for the framework group selected in the **Corporate Frameworks** explorer. Each column in the table is defined below:

- **ID:** Displays the identification number of the sub-group



- **Short Name:** Displays the sub-group's short name

To create a subordinate framework group:

- 1) Go to the selected framework group's profile and click **Subordinate Framework Groups**.
- 2) In the toolbar, click **New > Create New Framework Group**. The **Framework Group** dialog box opens.
- 3) Enter the information into each field, as required.

**Basic Data** tab:

- **ID:** Alfabet assigns a unique identification number to each object in the inventory. This number cannot be edited.
- **Name:** Enter a unique name for the framework group.
- **Description:** Enter a meaningful description that will clarify the purpose of the framework group.
- **Show Text:** Enter the text to be visualized on the diagram item in the framework diagram.

**Authorized Access** tab:

- **Authorized User:** Click the **Search** icon to assign an authorized user to the selected object. The authorized user will have Read/Write access permissions to the object and is authorized to maintain the object in Alfabet.
  - **Authorized User Groups:** Select the checkbox to assign Read/Write access permissions to all users in the selected user group. For more detailed information about the concept of access permissions, see the section [Understanding Access Permissions in Alfabet](#) in the reference manual *Getting Started with Alfabet*.
- 4) Click **OK** to save the framework group or **Cancel** if you do not want to save it.


### Adding an Existing Sub-Group

To add an existing framework group as a sub-group:

- 1) In the toolbar, click **New > Add Existing Framework Group**.
- 2) The object selector opens. Enter search criteria, as needed, and click **Search**.
- 3) Click a sub-group and click **OK**. The sub-group appears in the table.


### Removing a Sub-Group

If you remove any framework group, its sub-groups will also be removed. To remove a sub-group:

- 1) In the table, click the sub-group that you want to remove.
- 2) In the toolbar, click the **Detach**  button.
- 3) Confirm the warning by clicking **Yes**, or click **No** to exit without saving your changes.

## Deleting a Sub-Group

If you delete any framework group, its sub-groups will move to the top level of the explorer hierarchy. To delete a sub-group:

- 1) In the table, click the sub-group that you want to delete.
- 2) In the toolbar, click the **Delete**  button.
- 3) Confirm the warning by clicking **Yes**, or click **No** to exit without deleting the selected object(s).

## Designing the Navigation Diagram for a Framework Group

The **Navigation Diagram** page view allows you to view and design a framework group. Before you do this, you should create all necessary sub-groups and objects that are relevant to the selected framework group. Once these objects are created, you can define the visualization of all objects in the framework group in the **Navigation Diagram** page view.



To design a diagram, you must have access to the tool Alfabet Diagram Designer. You can access the Alfabet Diagram Designer by clicking the **Open Diagram** button. If the button is not visible in the view you are working with, you do not have the relevant access permissions to design diagrams in the Alfabet Diagram Designer.



For general information about designing, interpreting, and navigating diagrams in Alfabet, see the section [Working with Diagrams](#) in the reference manual *Getting Started with Alfabet*. For detailed information about how to design a diagram in the Alfabet Diagram Designer, see the reference manual *Designing IT Landscape Diagrams in Alfabet*.

When you open a diagram, you will see the diagram with the default settings. To change the display, set the following filters and click **Update**. To save the diagram layout for the selected project, click **Save Layout**.

- **Object State:** Define the application's object state that you want to view in the diagram. All applications with the defined object state will be displayed in the diagram. The default displays all object states.
- **Information Flow Attribute:** Select one or more information flow attributes that you want to display on the information flows. The attributes available in the **Information Flow Attribute** field are configured by your solution designer in the XML object **DiagramInformationFlowDef** in the configuration tool Alfabet Expand. For more information, see the section *Configuring the Visualization of Connection Items and Subordinate Object in Diagrams* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- **Object Filter :** Select one or more standard or custom attributes in order to specify which applications and local components to display. The checked attributes are combined with an OR property so that an application or local component will be displayed if it satisfies at least one of the checked attributes. The filter displays standard and custom attributes that have an enumeration defined or are of the type Boolean (True/False). The attribute is written using the following convention: `ClassName.PropertyName`.
- **Layout :** If necessary, define the layout you want to display. The default layout type is `Condensed` whereby all information flows for the same nodes are stacked on top of each

other. The number of stacked information flows is displayed on the information flow node. Other layout choices include `Mixed Model`, `Spring`, and `Sugiyama`.



Please keep the following in mind:

- A page size selected in the **Format** field is only applied to the diagram if `Mixed Model`, `Spring`, and `Sugiyama` are selected in the **Layout** field. If `Condensed` is selected in the **Layout** field, the page size definition will have no impact.
- If `Spring` has been selected in the **Layout** field, click the **Update** button to improve the layout. Whenever the **Update** button is clicked, the algorithm will attempt to improve the node placement.
- **Diagram Item Size:** Select the size of the diagram items displayed in the diagram. Depending on the configuration, some sizes may be configured to hide the name, icon, and attributes. In this case, point to the diagram item to display a tooltip with the object's name or click-and-hold to open the preview of the object. The values available in the **Diagram Item Size** field are configured by your solution designer in the XML object **DiagramInformationFlowDef** in the configuration tool Alfabet Expand. For more information, see the section *Configuring the Sizes of Diagram Items in Automatically Generated Diagrams* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- **Format:** Define the page format to use to display the diagram.
- **Active Date:** Define a date to display all applications for which the selected date is within the application's active period (as defined by its start and end date).
- **Landscape:** Set a checkmark to display the diagram in landscape orientation. Clear the checkmark to display the diagram in portrait orientation.
- **Hide Mismatches:** Set a checkmark to remove (hide) the greyed out objects from the diagram that do not meet the selector or filter settings.

To open the **Navigation Diagram** page view:

- 1) Go to the selected framework group's profile and click **Navigation Diagram**.
- 2) If a diagram already exists, you will see it in the page view area. If no diagram yet exists for the framework group, you will see the default view.




If the page view is empty, you must first define sub-groups and objects for the selected framework group.

- 3) To access the Alfabet Diagram Designer, click the **Open Diagram** button in the header of the **Navigation Diagram** page view you are currently working in. The Alfabet Diagram Designer opens. You can design your framework diagram in the Alfabet Diagram Designer. Please refer to the chapter *Designing Framework Group Diagrams* in the reference manual *Designing IT Landscape Diagrams in Alfabet*.
- 4) After you have designed a framework group and closed the Alfabet Diagram Designer, click **Update** in order to view the most recent changes to the diagram. The filter settings you define in the header page view will be applied to your new diagram.

## Working with Corporate Frameworks in Alfabet

The **Corporate Frameworks** functionality allows you to view a framework diagram and navigate to information about objects in Alfabet. A framework diagram models and presents objects in a specific structure that may be different from the structure of the inventory objects. The diagram is used solely for the purposes of visualization, presentation, and navigation.


Open the **Corporate Frameworks** functionality explorer, select the relevant framework group  and click **Navigation Diagram**. You will see the framework diagram for the selected framework group. The first time the framework group is selected, you will see the diagram with the default settings. To change the display, select a diagram view in the **Diagram View** filter and click **Update**. A diagram view allows users to superimpose qualitative information - such as indicators - on the objects in the diagram.



Frameworks are designed in the **Corporate Framework Designer**. For more information, see the section [Designing Framework Diagrams and Reference Models](#). Diagram views must be configured in order to select and display them in this view. For more information about the configuration of diagram views, see the section *Configuring Diagram Views for Diagrams* in the reference manual *Configuring Evaluation and Reference Data in Alfabet*.

## Chapter 16: Working with Storyboards

Storyboards provide a portal-like environment that allows users to easily access data and relevant information for their tasks. For example, storyboards may be defined for various stakeholders in the enterprise such as CIOs and business managers as well as users who have concrete aspects of the IT inventory that they are responsible for. The **Storyboards** explorer allows you to access all storyboards that you are the authorized user of or that you have been defined access permissions for as a specified user, member of a user group, or user assigned a permissible user profile.

In the **Storyboards** explorer, click a storyboard  to display it in the workspace to the right. You will see the selected storyboard on the right. Each graphic element in the diagram will typically have a bookmark defined behind it that targets a view in Alfabet. However, there may also be links to other storyboards, ARIS diagrams, websites and documents. You can click a link (or a part of the graphic image representing the link) and the link target will open.

Dashboard: Desks - Finance and Risk  
Dashboard

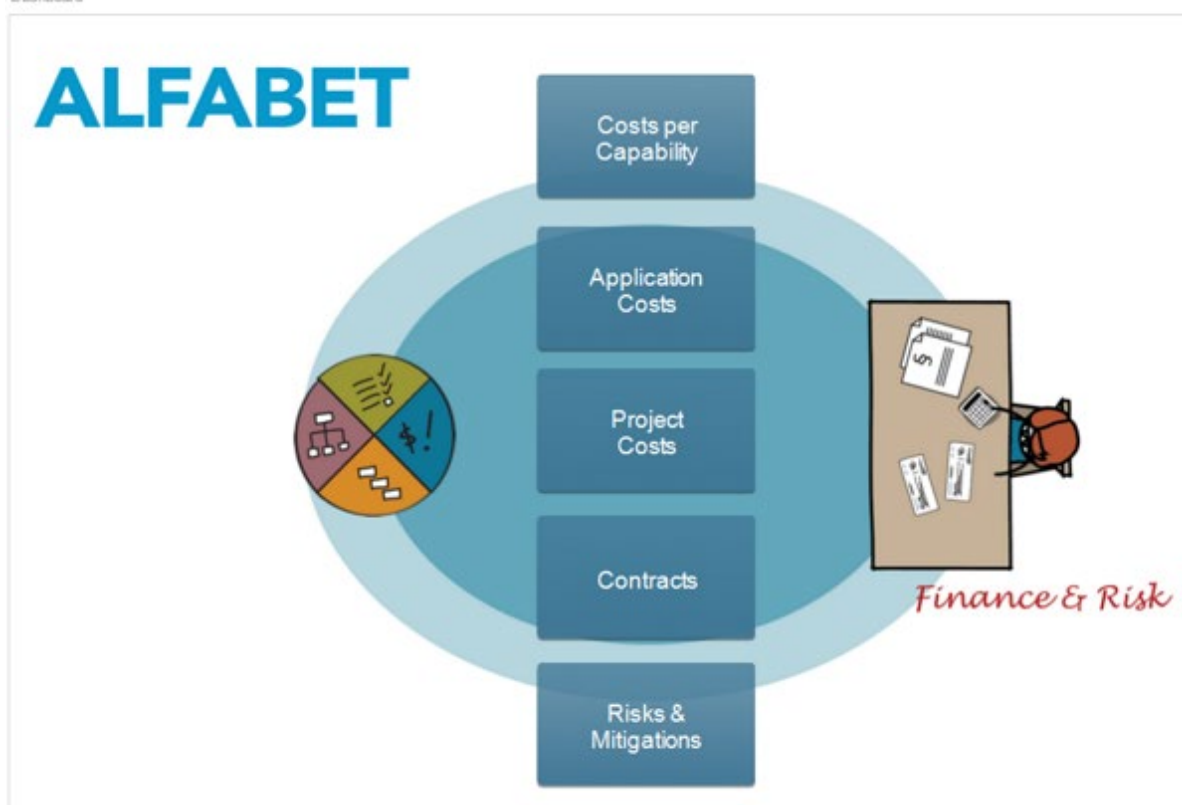


FIGURE: Storyboard diagram with 5 bookmarks

Storyboards are created in the **Storyboard Management** capability and designed in the Alfabet Diagram Designer.

The following information is available:

- [Creating and Managing Storyboards](#)
  - [Creating Bookmarks for the Storyboard](#)
  - [Creating ARIS Diagram Links for the Storyboard](#)

- [Creating a Diagram for the Storyboard](#)
- [Designing a Diagram for the Storyboard](#)
- [Defining User Access to a Storyboard](#)
- [Defining User Group Access to a Storyboard](#)
- [Defining User Profile Access to a Storyboard](#)
- [Defining the Storyboard as the Start Page for Users](#)

## Creating and Managing Storyboards

The **Storyboard Management** functionality allows you to create and design storyboards for various kinds of users from CIOs to business managers to those responsible for the IT. The storyboard is a diagram made up of a set of visual links that allow users to navigate directly to the information they need. The dashboard typically consists of bookmarks that target objects in explorers, object profiles (or object cockpits), page views, or configured reports. A dashboard may also have links to other storyboards, ARIS diagrams, web-sites or documents.

Users defined as viewers of the storyboard will be able to access it in the **Storyboards** functionality. If a storyboard has been defined for a user, the bookmark can be accessed via **Bookmarks > Show Start Storyboard**. If no dashboard is available for the user, the option will not be displayed in the **Bookmarks** drop-down menu. You can also make a storyboard available to specific users as the start page that they first see after they log in to Alfabet.

The following steps that are required in order to create a storyboard:

- Create all bookmarks, ARIS diagram links, and other storyboards that are to be available in the storyboard. A standard default setting should be defined for any existing filters in views targeted by a bookmark.
- Create a storyboard diagram containing bookmarks and other links that should be accessed by a specific set of users via the storyboard. The diagram is created in the Alfabet Diagram Designer which can be accessed via the **Storyboard Diagram** page view.
- Assign the users who may access the storyboard in the **Viewers** page view. These users will see the storyboard when they open the **Storyboards** functionality.
- Assign the user groups who may access the storyboard in the **Attached User Groups** page view. Users in these user groups will see the storyboard when they open the **Storyboards** functionality.
- Assign the user profiles who may access the storyboard in the **Attached User Profiles** page view. Users with these user profiles will see the storyboard when they open the **Storyboards** functionality.
- Assign the users who shall view the storyboard as their start page in the **Use for Start Page** page view.

The following information is available:

- [Creating Bookmarks for the Storyboard](#)
- [Creating ARIS Diagram Links for the Storyboard](#)

- [Creating a Diagram for the Storyboard](#)
- [Designing a Diagram for the Storyboard](#)

## Creating Bookmarks for the Storyboard

Before you can configure the storyboard, you must create all bookmarks that are to be available in the storyboard. A standard default setting should be defined for any existing filter settings in the view when the bookmark is defined. You can open a separate browser window to create the bookmarks and assign them directly to the dashboard diagram in the Alfabet Diagram Designer.

For information about how to create bookmarks, see the chapter [Creating, Managing, and Accessing Your Bookmarks](#).



Please keep the following in mind when defining and accessing bookmarks:

- A bookmark created for an explorer is a reference to a position in an explorer. The explorer hierarchy is dynamically computed at runtime. If the structure of the explorer changes, the link may no longer be valid. For example, if new intermediary levels have been added to an explorer since the bookmark was created, the path saved for the bookmark will no longer be accurate and the bookmarked location may not be found.
- Please note that some explorers and views cannot be bookmarked. For example, bookmarks cannot be created for functionalities used for administrative purposes that are available via an administrative user profile or configuration functionalities that are not associated with objects governed by access permissions. If the functionality or view may not be bookmarked, the **Create Bookmark** capability will be disabled.
- The user profile that you are logged in with when you create the bookmark is the user profile used to initially open the bookmark. Thus, if a bookmark is shared with other users via a storyboard, for example, then those users accessing an Alfabet functionality via the dashboard will access the functionality with the user profile associated with the bookmark implemented in the storyboard. For more information about working with storyboards, see the chapter [Working with Storyboards](#).

## Creating ARIS Diagram Links for the Storyboard

Before you can configure the storyboard, you must create all ARIS diagram links that are to be available in the storyboard. In the object selector that opens when users select the ARIS diagram link to assign to the dashboard, users can search via the **Simple** tab for any ARIS diagram link defined for any object in Alfabet, or search the business process hierarchy for ARIS diagram links defined for the relevant business processes via the **Browse** tab. Please note that other browse hierarchies may be configured in Alfabet Expand and displayed in the object selector. Links to ARIS diagrams must first be created in the *ARIS Diagrams Page View*.

## Creating a Diagram for the Storyboard

You can create multiple storyboard diagrams. The storyboard diagrams that you create can be accessed by users in the **Storyboards** functionality or as their start page, if so defined. Once you have created the diagram, you can add bookmarks to it and design the layout of the diagram in the Alfabet Diagram Designer. To create a dashboard diagram, open the **Storyboard Management** functionality and click **New > Create Storyboard Diagram** in the toolbar. In the window that opens, enter a name and, if necessary, a description and click **OK**. The new diagram name appears in the table. You can now design the diagram.



Alternatively, you can click **New > Copy Selected Diagram** in the toolbar in order to create a diagram based on an existing diagram.

## Designing a Diagram for the Storyboard

Storyboard diagrams are designed in the Alfabet Diagram Designer, which can be opened via the **Open Diagram** button in the **Storyboard Diagram** page view. The diagram designer can add links to other storyboards as well as bookmarks, Web links, and ARIS diagram links. Any links to storyboards, bookmarks, and ARIS diagrams must first be created before they can be added to the storyboard diagram.


The links can be visually designed using any of the visual design elements available in Alfabet Diagram Designer. For example, the link could be placed behind an image so that when the user clicks the image, the link will open in the **Storyboards** functionality.







To design a diagram, you must have access to the tool Alfabet Diagram Designer. You can access the Alfabet Diagram Designer by clicking the **Open Diagram** button. If the button is not visible in the view you are working with, you do not have the relevant access permissions to design diagrams in the Alfabet Diagram Designer.

The following description is a brief explanation of how to create a storyboard diagram. Detailed information is available in the chapter *Designing Storyboard Diagrams* in the reference manual *Designing IT Landscape Diagrams in Alfabet*.

To access the Alfabet Diagram Designer in order to design a storyboard diagram:

- 1) Click a storyboard in the **Storyboards Management** view, navigate to the storyboard object profile and click **Storyboard Diagram**.
- 2) In the view that opens, click the **Open Diagram** button. The Alfabet Diagram Designer opens in a new browser tab.
- 3) You can add existing bookmarks, links to ARIS diagrams or other storyboards as well as Web links and documents:
  - To add a link that navigates to another storyboard diagram, click the **Storyboard** icon  in the **Toolbox Items** pane and click a blank space in the diagram. The object selector opens. Define search parameters, as needed, and select the storyboard diagram(s) you want to add to the diagram. After you click **OK** in the object selector, a yellow rectangle is placed in the diagram.



- To add a Web link that opens a website or an externally-stored document, click the **Web Link**  icon in the **Toolbox Items** pane and click a blank space in the diagram. The URL editor opens. Define the following fields and click **OK**:
    - **Title:** Enter the text that should be displayed for the Web link. The text should help users understand why the URL is available.
    - **URL:** Enter the complete URL starting with http://, or click the **Browse** button to navigate to a directory where a document is located that you want to link to. The URL link may contain up to 511 characters.
    - **Category:** Optionally select the document category that the URL should be assigned to.
  - To add a link that opens a bookmarked object profile/object cockpit, explorer, or view, click the **Bookmark** icon  in the **Toolbox Items** pane and click a blank space in the diagram. In the object selector, define search parameters, as needed, and select the bookmark(s) you want to add to the diagram. After you click **OK** in the object selector, a white rectangle is placed in the diagram.
  - To add a link to ARIS diagrams in ARIS, click the **ARIS Diagram Link** icon  in the **Toolbox Items** pane and click a blank space in the diagram. In the object selector, define search parameters, as needed, and select the ARIS diagram link(s) you want to add to the diagram. After you click **OK** in the object selector, a white rectangle is placed in the diagram.
- 4) Repeat the previous steps, as needed, in order to add the relevant links to the storyboard diagram.
  - 5) Design the visualizations of the links with text, color, images, etc., as needed. For more information, see the section *Tips for Designing the Layout of the Diagram*.
  - 6) Click the **Save** button to save your changes.
  - 7) Return to the browser tab displaying the **Storyboard Diagram** page view and click the **Update** button to view the design. Please note that you cannot navigate via the links in this view. To navigate to the views targeted by the links, go to the **Storyboards** functionality and select the relevant storyboard  in the explorer.

## Defining User Access to a Storyboard

In the **Viewers** page view in the **Storyboard Management** functionality, you can define the users that may access a storyboard diagram. Only those users defined as viewers will be able to view and access the storyboard in the **Storyboards** functionality.

To define the users that may access a storyboard diagram:

- 1) Click a storyboard in the **Storyboards Management** view, navigate to the storyboard object profile and click **Viewers**.
- 2) In the toolbar, click **New > Add New Viewers**.
- 3) The person selector opens. Enter search criteria to find the relevant users and click **Search**.

- 4) In the selector, select the user(s) who should have access to the storyboard and click **OK**. The user is added to the list of viewers and his/her name and email address is displayed in the table.

## Defining User Group Access to a Storyboard

In the **Attached User Groups** page view in the **Storyboard Management** functionality, you can define the user groups that may access a storyboard diagram. Only users in the assigned user groups will be able to view and access the storyboard in the **Storyboards** functionality.

To define the user groups that may access a storyboard diagram:

- 1) Click a storyboard in the **Storyboards Management** view, navigate to the storyboard object profile and click **Attached User Groups**.
- 2) In the toolbar, click **New > Assign User Groups**.
- 3) The user group selector opens. Enter search criteria to find the relevant user groups and click **Search**.
- 4) In the selector, select the user group(s) who should have access to the storyboard and click **OK**.

## Defining User Profile Access to a Storyboard

In the **Attached User Profiles** page view in the **Storyboard Management** functionality, you can define the user profiles that may access a storyboard diagram. Only users in the assigned user profiles will be able to view and access the storyboard in the **Storyboards** functionality.

To define the user profiles that may access a storyboard diagram:

- 1) Click a storyboard in the **Storyboards Management** view, navigate to the storyboard object profile and click **Attached User Profiles**.
- 2) In the toolbar, click **New > Assign User Profiles**.
- 3) The user profile selector opens. Enter search criteria to find the relevant user profiles and click **Search**.
- 4) In the selector, select the user profile(s) who should have access to the storyboard and click **OK**.

## Defining the Storyboard as the Start Page for Users

In the **Use for Start Page** page view in the **Storyboard Management**, you can define the users that may access the storyboard diagram as their start page. All users defined in this view will see the storyboard diagram as their start page. If multiple storyboards are defined as the start page for a user, a view with a link to all storyboards defined as start pages for that user will be displayed after the user logs in to Alfabet and the user can click the link to the relevant dashboard.



If a storyboard has been configured as the start page for a user, the storyboard will have precedence over the guide page configuration and the user will not have access to the guide pages defined for his/her user profile.

To define the users that may access a storyboard diagram:

- 1) Click a storyboard in the **Storyboards Management** view, navigate to the storyboard object profile and click **Use for Start Page**.
- 2) In the toolbar, click **New > Add New Persons**.
- 3) The person selector opens. Enter search criteria to find the relevant users and click **Search**.
- 4) Select the user(s) who should have see the storyboard as their start page and click **OK**. The user is added to the list of users and his/her name and email address is displayed in the table.

## Appendix 1: Alfabet Configuration Tools and Functionalities

Software AG provides a number of tools to simplify the tasks of configuration. If a specific tool is not described in this documentation, the respective manual describing the tool will be referenced.

The following Alfabet tools and functionalities are described below:

Use the Configuration Tool...	In Order To...
Alfabet Administrator	<p>Configure the Alfabet components and manage the Alfabet database. Configure access rights to Alfabet and track Alfabet usage and audit history.</p> <p>The Alfabet Administrator is described in the reference manual <i>System Administration</i>.</p>
Alfabet Expand	<p>Configure the Alfabet solution. Many Alfabet functionalities as well as administrative tasks are based on a specific solution configuration defined in Alfabet Expand. For information about the configuration tool Alfabet Expand, see the reference manual <i>Configuring Alfabet with Alfabet Expand</i>. This is available as a PDF document on your installation CD.</p> <p>Alfabet Expand is currently available as either Alfabet Expand Windows or as Alfabet Expand Web. Alfabet Expand Web is available for the Alfabet Cloud Enterprise and is a web-based tool that supports most core configuration tasks. Alfabet Expand Windows is required for more complex configuration tasks including workflow configuration, ADIF, and APF.</p>
Guide Pages Designer	<p>Create customized as start pages for the user profiles in your user community. The Guide Pages Designer is available as a web-based tool. For information about the Guide Pages Designer, see the reference manual <i>Designing Guide Pages for Alfabet</i>. This is available as a PDF document on your installation CD.</p>

Use the Functionality in Alfabet...	In Order To...
<b>Administration</b> application	<p>The <b>Administration</b> application is accessible via the Alfabet interface by using the <code>Admin</code> user profile. For more information, see the reference manual <i>User and Solution Administration</i>.</p> <p>The <b>Administration</b> application contains the following modules and functionalities:</p> <ul style="list-style-type: none"> <li>User Administration</li> <li>User Profiles Administration</li> </ul>

Use the Functionality in Alfabet...	In Order To...
	<ul style="list-style-type: none"> <li>• Users Administration</li> <li>• User Groups Administration</li> <li>• Reports Administration</li> <li>• Solution Administration                             <ul style="list-style-type: none"> <li>• Monitors</li> <li>• Date Monitors</li> <li>• Consistency Monitors</li> <li>• Notification Monitors</li> <li>• Monitor Management</li> <li>• Workflow Administration</li> <li>• Internal Documents</li> <li>• Archive Manager</li> <li>• Broadcast Messages</li> <li>• Discussion Groups</li> <li>• Risk Management Templates</li> <li>• Technical Environments</li> <li>• Time Series Manager</li> <li>• Publications Manager</li> <li>• Risk Mitigation Templates by Risk Mitigation Category</li> <li>• ADIF Jobs Administration</li> <li>• Email Messages logging</li> <li>• Automated Data Translations</li> <li>• Event Administration</li> <li>• Questionnaire Indicators</li> </ul> </li> <li>• Configuration                             <ul style="list-style-type: none"> <li>• Reference Data</li> <li>• Evaluations and Portfolios</li> <li>• Class Configuration</li> <li>• Diagram Views</li> </ul> </li> </ul>

Use the Functionality in Alfabet...	In Order To...
	<ul style="list-style-type: none"> <li>• Costs Centers</li> <li>• Manage Business Documents</li> <li>• Color Rules Manager</li> <li>• Enterprise Calendars</li> <li>• Integration Solutions Configuration</li> <li>• Search <ul style="list-style-type: none"> <li>• Simple Search</li> <li>• Browse</li> <li>• Full-Text Search</li> <li>• Glossary</li> <li>• Reports</li> </ul> </li> <li>• Publication</li> <li>• Admin Desktops <ul style="list-style-type: none"> <li>• Organization Admin</li> <li>• Application Group Admin</li> <li>• Component Group Admin</li> <li>• Domain Admin</li> <li>• ICT Object Category Admin</li> </ul> </li> <li>• Data <ul style="list-style-type: none"> <li>• Capture Data</li> <li>• ADIF Jobs Administration</li> </ul> </li> </ul>
<p><b>Configuration</b> module</p>	<p>The <b>Configuration</b> module is accessible via the Alfabet interface. For more information, see the reference manual <i>Configuring Evaluation and Reference Data in Alfabet</i>.</p> <p>The <b>Configuration</b> module contains the following functionalities:</p> <ul style="list-style-type: none"> <li>• Reference Data</li> <li>• Evaluations and Portfolios</li> <li>• Class Configuration</li> <li>• Diagram Views</li> </ul>

Use the Functionality in Alfabet...	In Order To...
	<ul style="list-style-type: none"> <li>• Costs Centers</li> <li>• Manage Business Documents</li> <li>• Color Rules Manager</li> <li>• Enterprise Calendars</li> <li>• Integration Solutions Configuration</li> </ul>

The configuration tools Alfabet Expand and the Guide Pages Designer are optional components. Their availability is regulated by your enterprise's licensing agreement with Software AG. In addition to the configuration tools, a number of small executables for batch job processing are available. Their functionality is described in the reference manual *System Administration* in conjunction with the relevant tasks to be performed.

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