

# QualiWare Lifecycle Manager

Starter course

# Agenda

- Introduction: agenda, course objectives, presentation
- Overview – About QualiWare
- Set-up and navigation
- How to draw diagrams
- How to describe diagrams and symbols
- How to link across diagrams
- External documents
- How to describe the organization
- Change management
- How to describe the strategy
- Risk Management
- Problems, Change requests, Complaints and Nonconformities
- Audits
- Analytics



# Breaks and Lunch

- 10:00 Break
- 12:00 Lunch
- 14:30 Coffee/Cake Break
- 17:00 End of day



# Presentation

- Who am I?
- What do I work with?
- My expectations of the course are...



# Course objectives

- To learn the basic functionality in the tool QualiWare Lifecycle Manager:
  - Draw and edit diagrams
  - Describe models and model objects
  - Reuse and create links between models and model objects
  - Work with text descriptions and matrices
- To learn how to use the tool for:
  - Process modeling
  - Workflows
  - Organization diagrams
  - Goal models
- To obtain knowledge about:
  - Version handling





**qualiware**<sup>®</sup>  
Enabling positive change

# Overview – About QualiWare

## About QualiWare

- Founded in Denmark 1991
- Global consulting services and enterprise modeling software provider
- Offices in Denmark, Brazil, Norway, Sweden, Ukraine, South Africa and US with 120 employees
- Distributors in France, Spain, UK and South Korea



# How can we help?



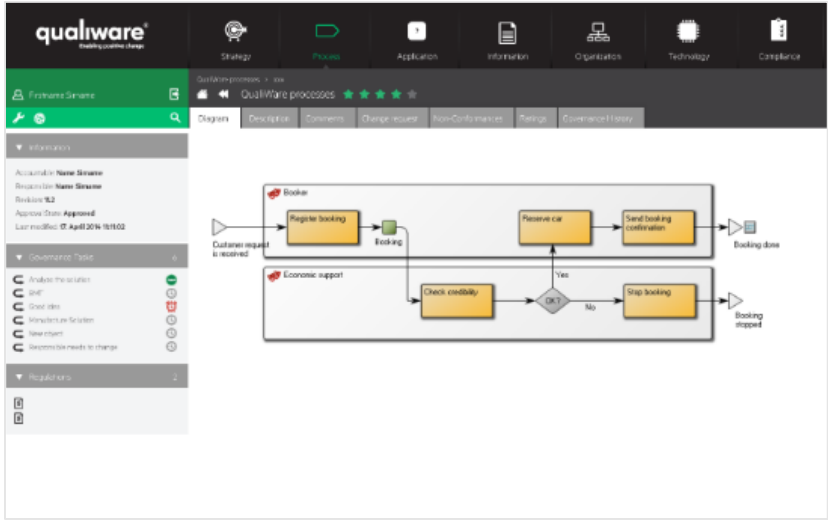
	STRATEGY	PROCESS	APPLICATION	INFORMATION	ORGANIZATION	TECHNOLOGY
CONCEPTUAL	Strategy 	Business Process Model 	Application Architecture 	Semantic Model 	Stakeholder Model 	Strategic Technology Model 
LOGICAL	Policies 	Business Process Design 	System Design 	Logical Data Model 	Organization Model 	Business Technology 
OPERATIONAL	Business Rules 	Work Flow 	Component Model 	Physical Data Model 	Human Resource Model 	Physical Technology 



**Coherency**

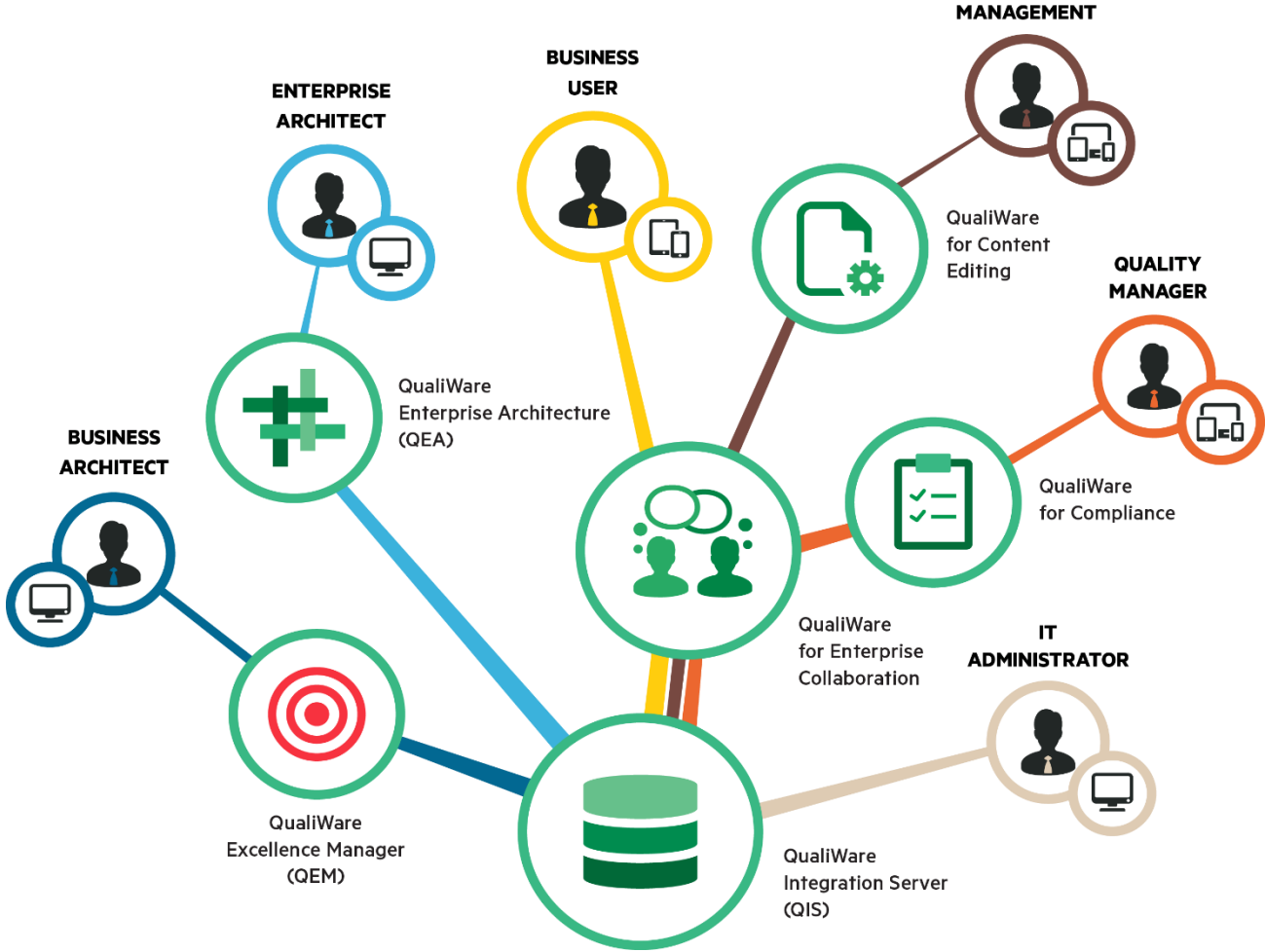


**Consistency ↔ Consensus**

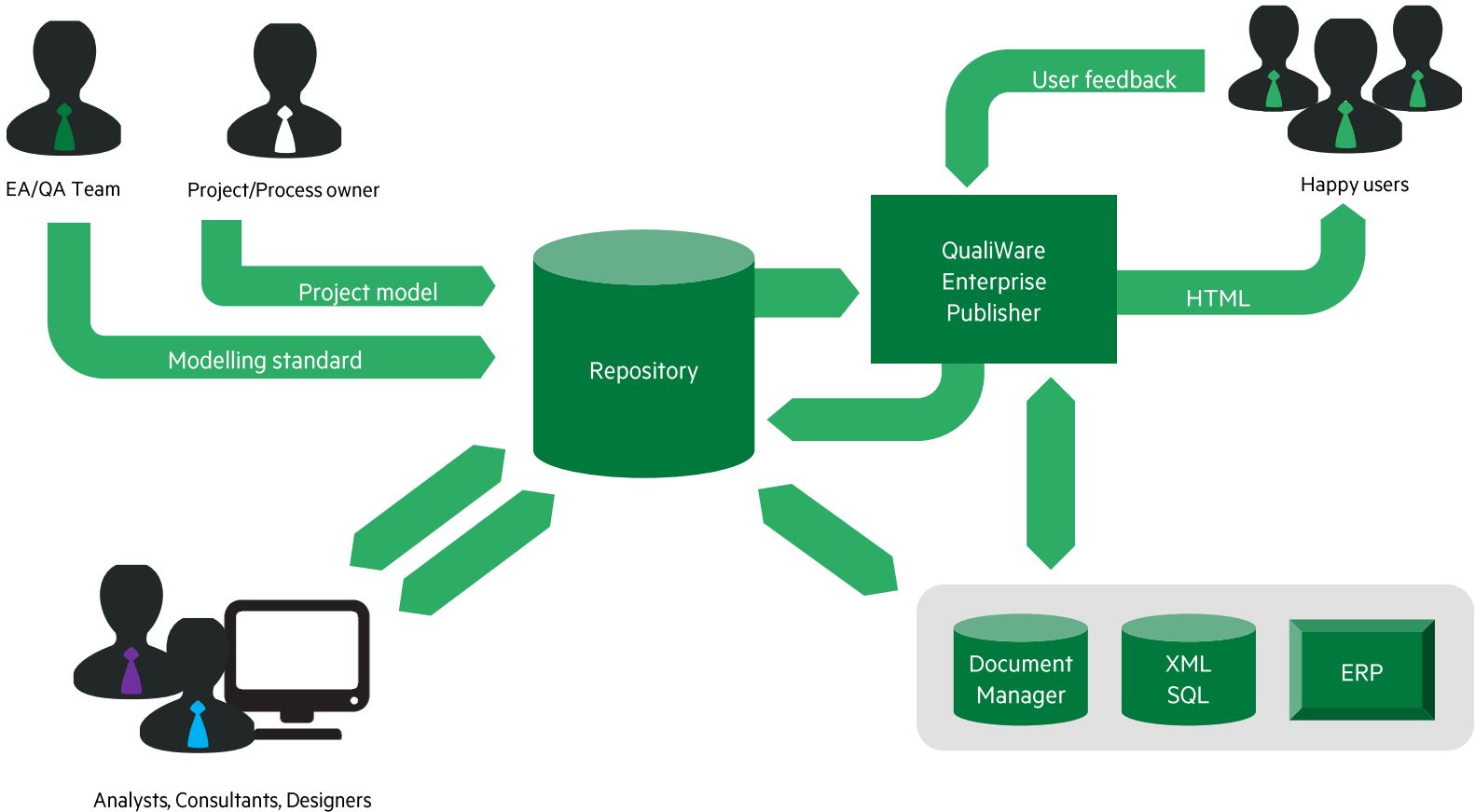




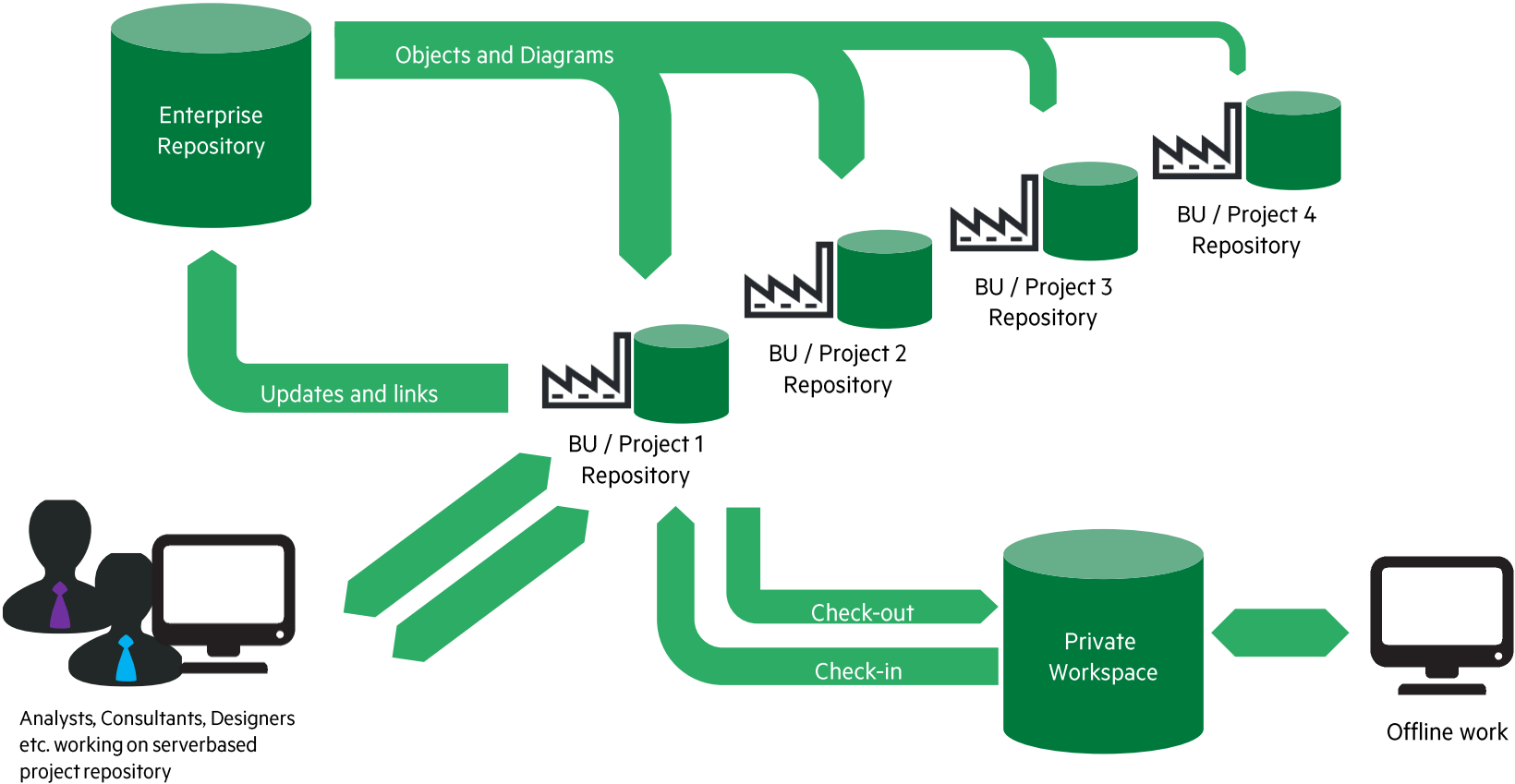
# Product structure



# Typical scenario



# Corporate repository architecture

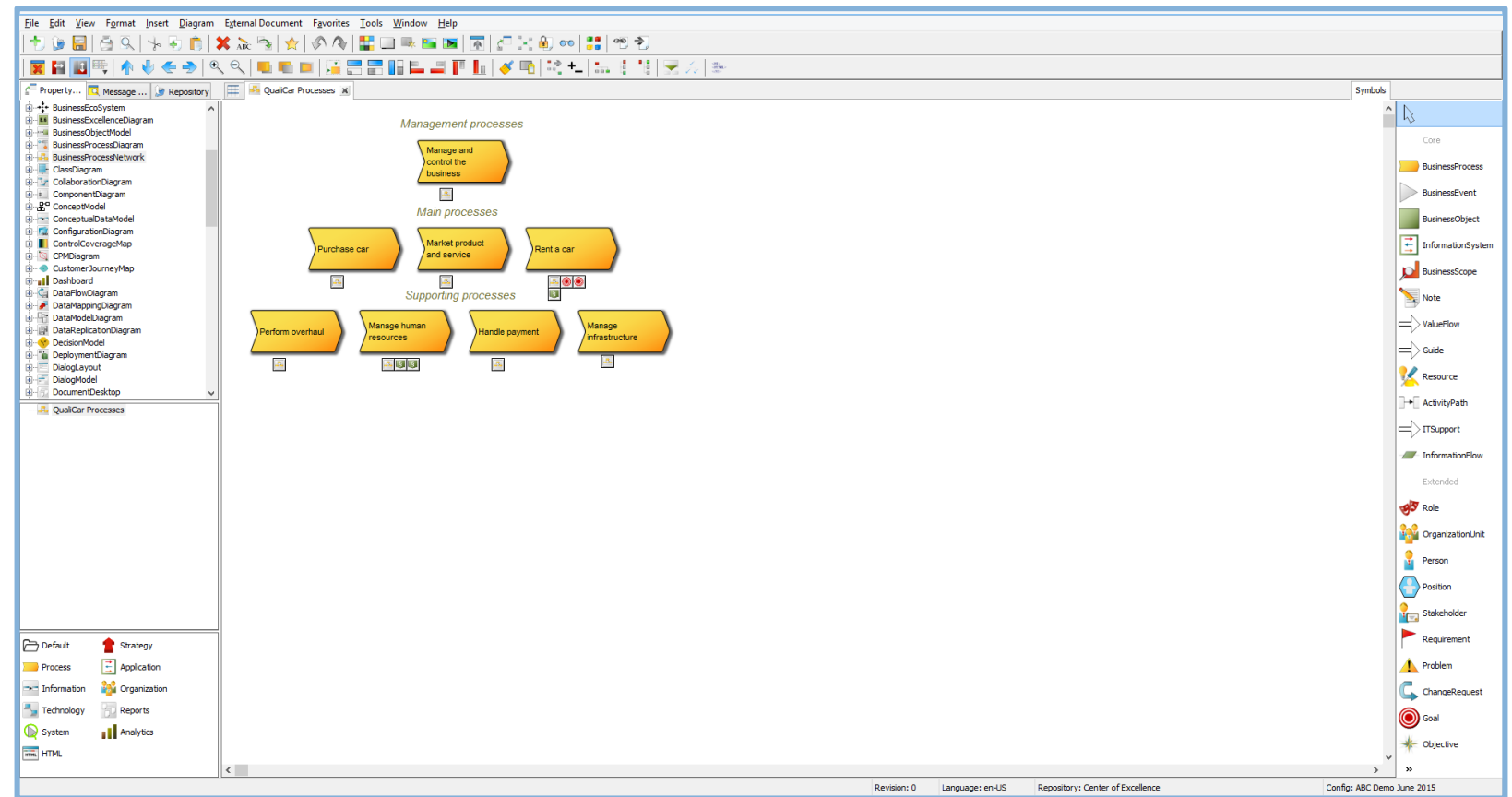


# QLM user interface

- The users (modelers, process owners, system architects etc.) describe the business with a set of diagram templates e.g. process models, workflows, organization and strategy models



QualiWare Lifecycle Manager

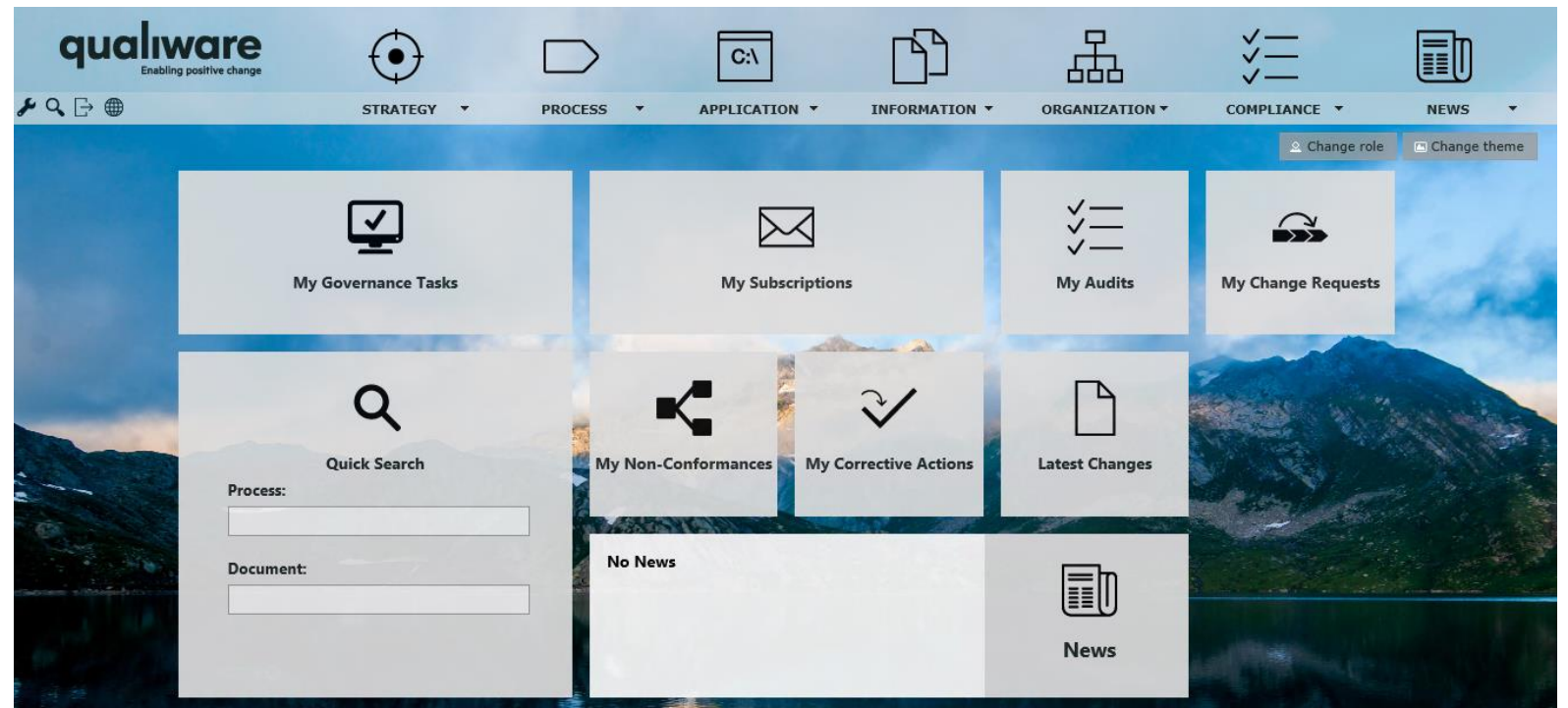


# Web interface










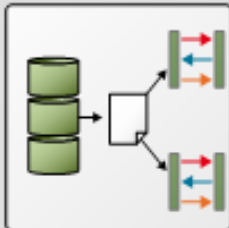
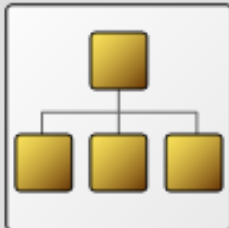


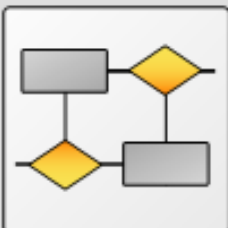


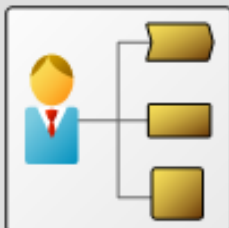
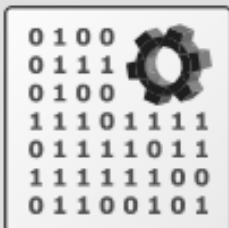
- The models are published on the intranet and made available for the employees in the organization
- The web pages can be designed according to the preferred style guide



Web browser



# Enterprise Architecture Framework

	Strategy	Process	Application	Information	Organization	Technology
Conceptual	 <p>Strategy</p>	 <p>Business Process Model</p>	 <p>Application Architecture</p>	 <p>Semantic Model</p>	 <p>Stakeholder Model</p>	 <p>Strategic Technology Model</p>
Logical	 <p>Policies</p>	 <p>Business Process Design</p>	 <p>System Design</p>	 <p>Logical Data Model</p>	 <p>Organization Model</p>	 <p>Business Technology</p>
Operational	 <p>Business Rules</p>	 <p>Work Flow</p>	 <p>Component Model</p>	 <p>Physical Data Model</p>	 <p>Human Resource Model</p>	 <p>Physical Technology</p>

# Process

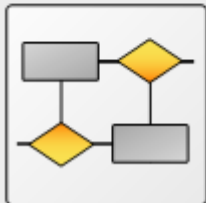
## Process



Business Process Model



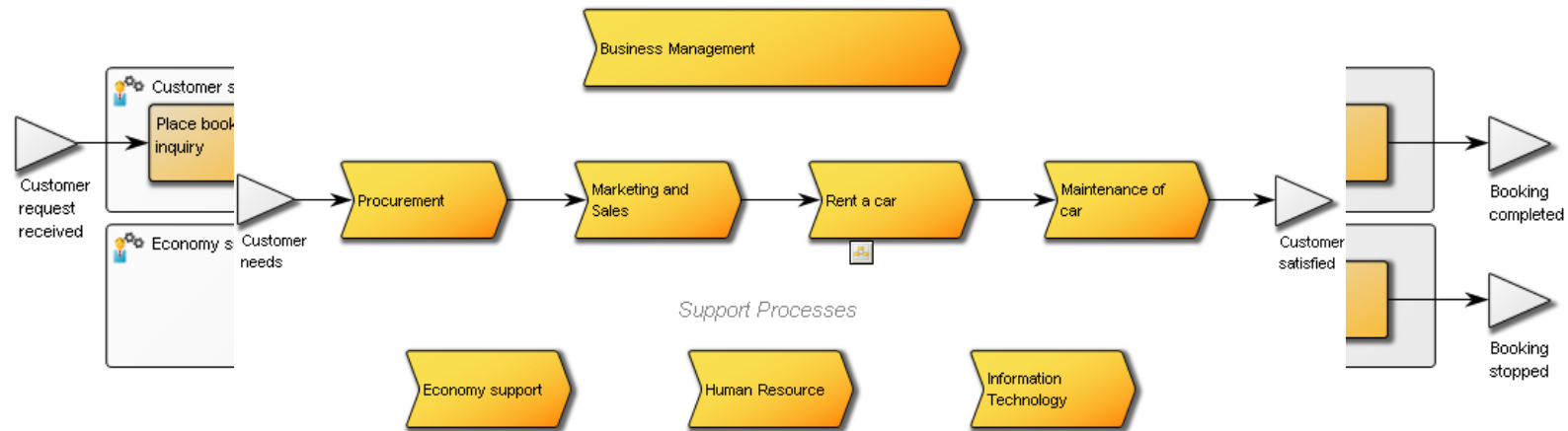
Business Process Design



Work Flow

Core processes break down to sub processes...

...and are visualized by workflow diagrams

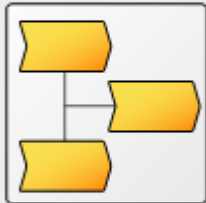


# Process

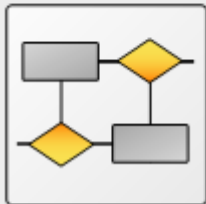
## Process



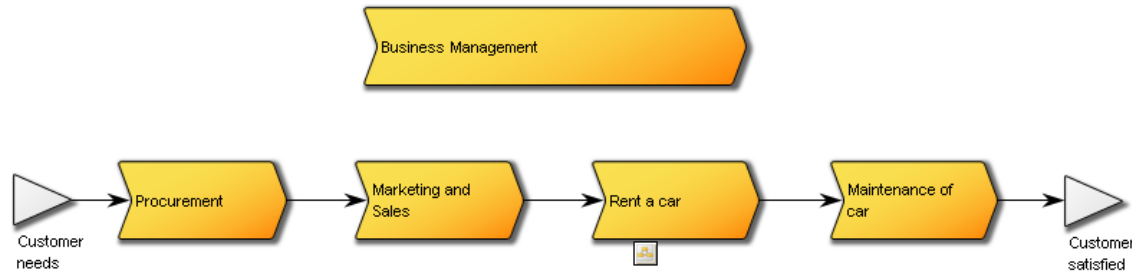
Business Process Model



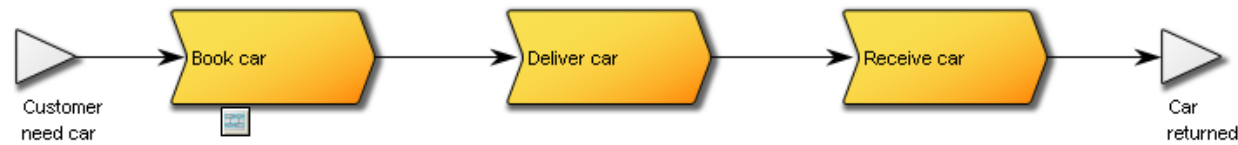
Business Process Design



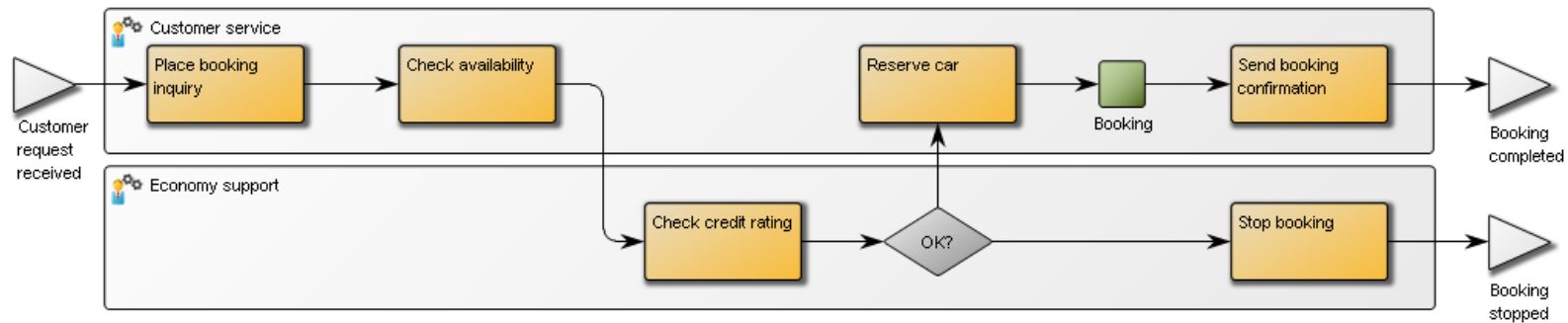
Work Flow



Support Processes



Core processes break down to sub processes...

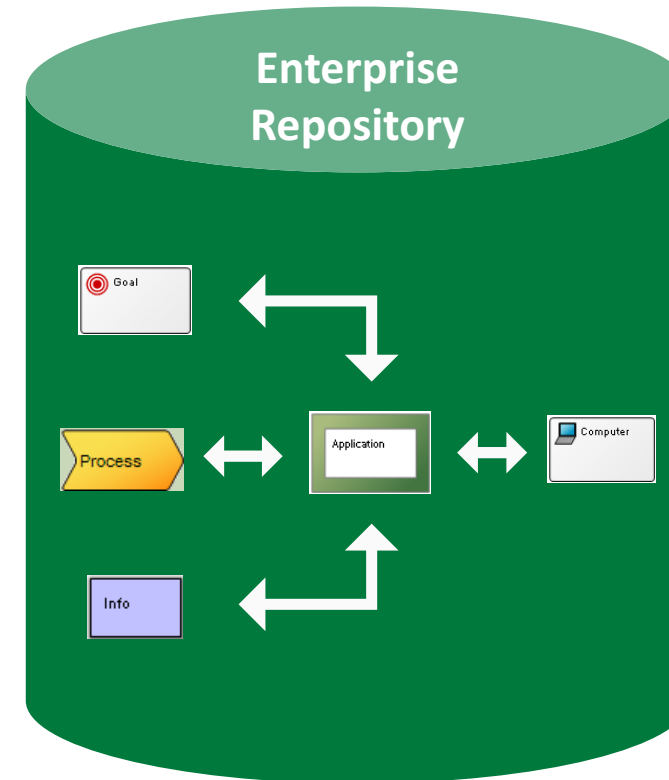


...and are visualized by workflow diagrams



# Repository

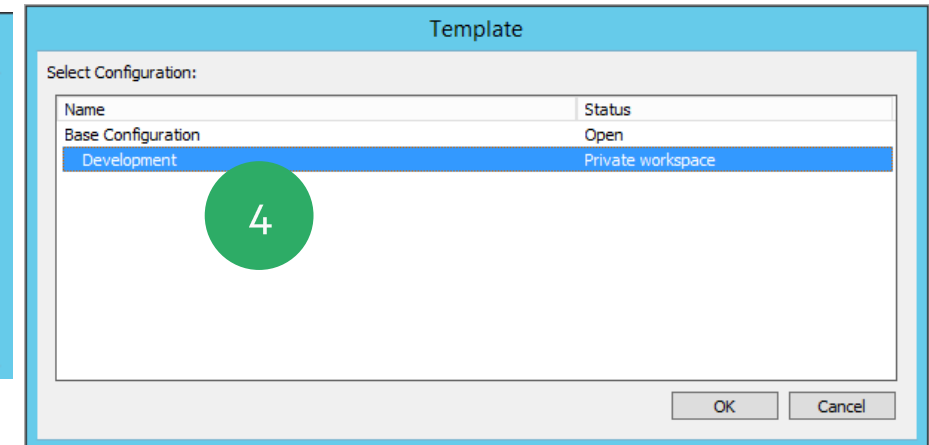
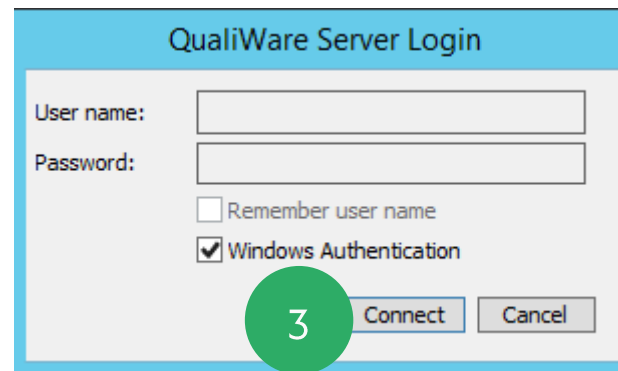
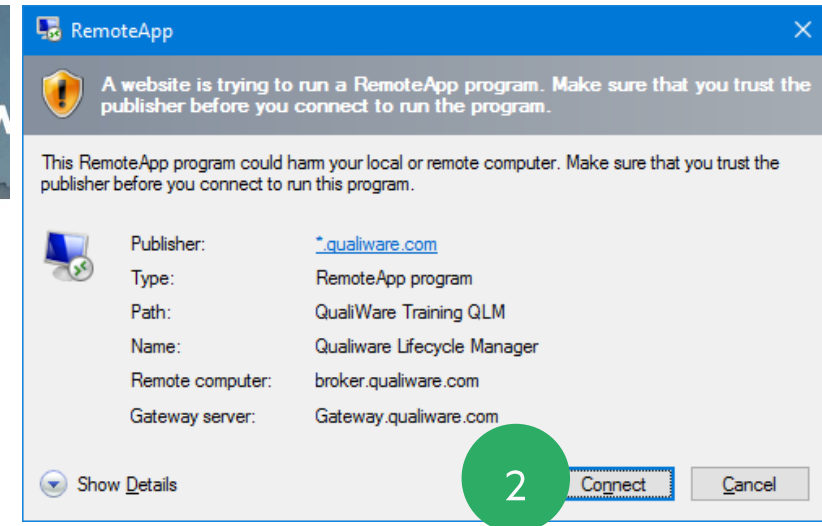
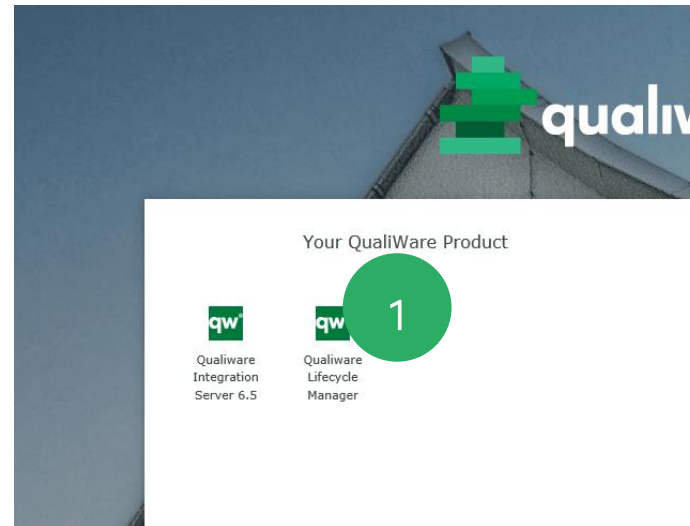
- Models and model objects are stored in the repository
- Available for all users (dependent on access rights)
- Reuse of objects
- Consistent models
- Traceability



# Set-up and navigation

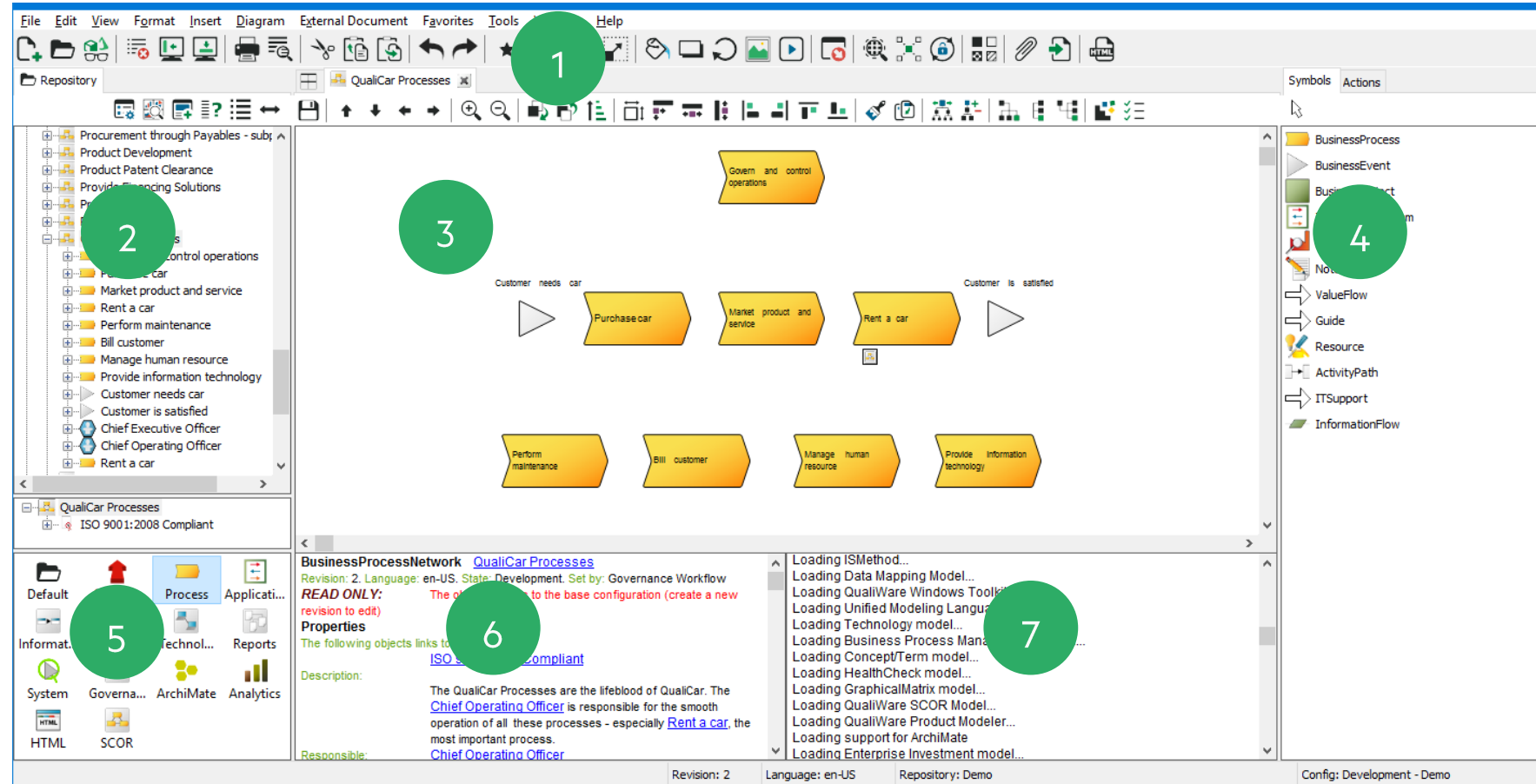
# Login

- 1 Select QualiWare Lifecycle Manager
- 2 Click Connect
- 3 Ensure that Windows Auth. is checked and click Connect
- 4 Select Development and click OK



# Workspace

- 1 Menus and toolbars
- 2 Repository Explorer
- 3 Diagram canvas
- 4 Symbol panel
- 5 Repository views
- 6 Property window
- 7 Message/list window



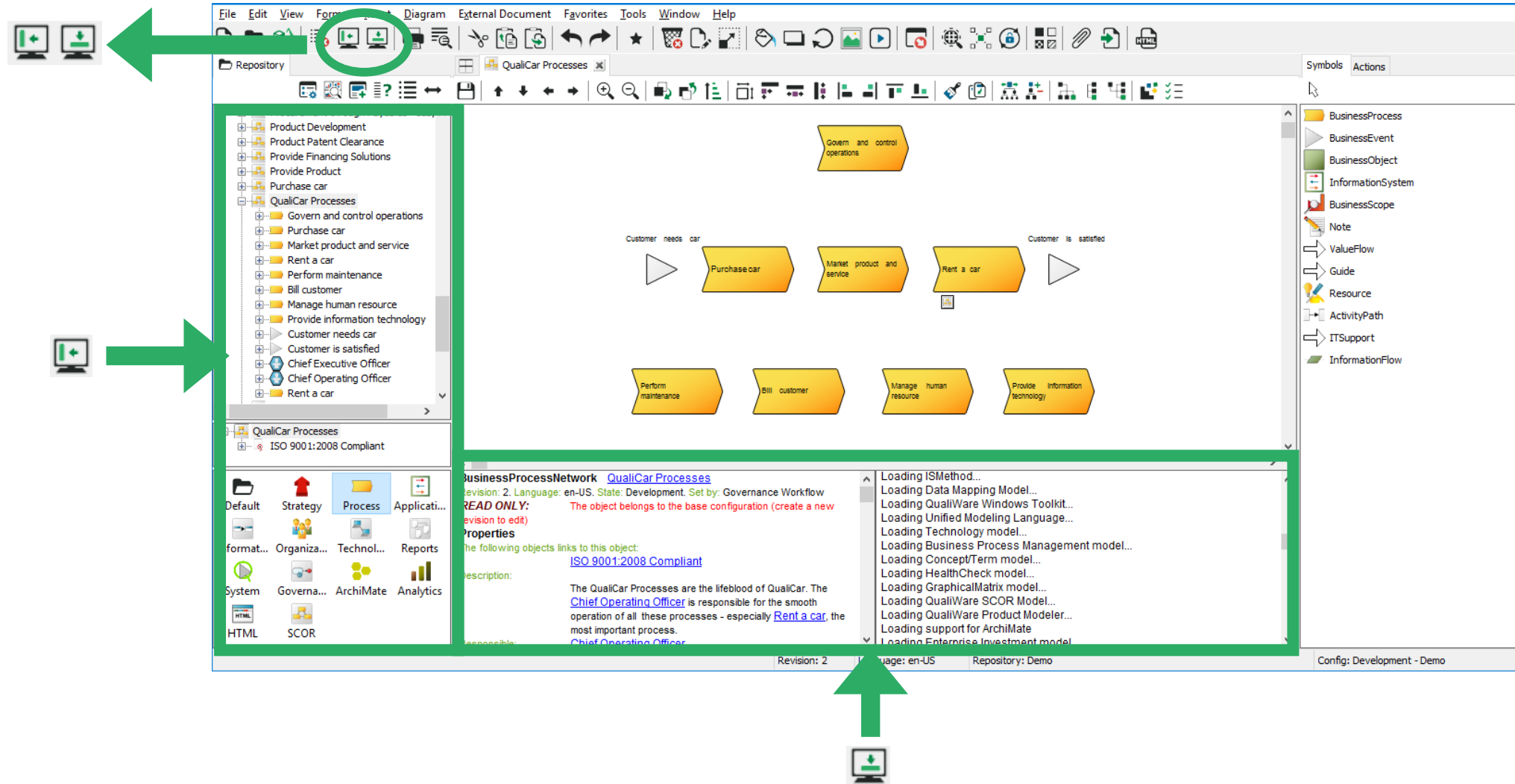
The screenshot displays the QualiWare workspace interface. At the top, a menu bar includes File, Edit, View, Format, Insert, Diagram, External Document, Favorites, Tools, and Help. Below the menu is a toolbar with various icons for file operations and diagram editing. The main workspace is divided into several panels:

- Repository Explorer (2):** A tree view on the left showing a hierarchy of processes, including 'Procurement through Payables - sub...', 'Product Development', 'Product Patent Clearance', 'Provide Financing Solutions', 'Control operations', 'Perform maintenance', 'Bill customer', 'Manage human resource', 'Provide information technology', 'Customer needs car', 'Customer is satisfied', 'Chief Executive Officer', 'Chief Operating Officer', and 'Rent a car'.
- Diagram Canvas (3):** The central area showing a process flow diagram. It includes a start event 'Customer needs car', followed by activities 'Purchase car', 'Market product and service', and 'Rent a car', leading to an end event 'Customer is satisfied'. Below this, there are four additional activity boxes: 'Perform maintenance', 'Bill customer', 'Manage human resource', and 'Provide information technology'.
- Symbol Panel (4):** A panel on the right containing a list of symbols and actions, such as BusinessProcess, BusinessEvent, BusinessStart, ValueFlow, Guide, Resource, ActivityPath, ITSupport, and InformationFlow.
- Repository Views (5):** A panel at the bottom left showing various views like Default, Process, Application, Information, Technology, Reports, System, Governance, ArchiMate, Analytics, HTML, and SCOR.
- Property Window (6):** A panel at the bottom center displaying properties for the selected process. It shows 'BusinessProcessNetwork QualiCar Processes', 'Revision: 2', 'Language: en-US', 'State: Development', and 'Set by: Governance Workflow'. It also includes a 'Properties' section with a description: 'The QualiCar Processes are the lifeblood of QualiCar. The Chief Operating Officer is responsible for the smooth operation of all these processes - especially Rent a car, the most important process.' and 'Responsible: Chief Operating Officer'.
- Message/List Window (7):** A panel at the bottom right showing a list of loaded models, including 'Loading ISMethod...', 'Loading Data Mapping Model...', 'Loading QualiWare Windows Tool...', 'Loading Unified Modeling Language...', 'Loading Technology model...', 'Loading Business Process Management...', 'Loading Concept/Term model...', 'Loading HealthCheck model...', 'Loading GraphicalMatrix model...', 'Loading QualiWare SCOR Model...', 'Loading QualiWare Product Modeler...', 'Loading support for ArchiMate', and 'Loading Enterprise Investment model...'.

At the bottom of the workspace, there is a status bar showing 'Revision: 2', 'Language: en-US', 'Repository: Demo', and 'Config: Development - Demo'.

# Workspace

Show/hide windows to set up your preferred desktop



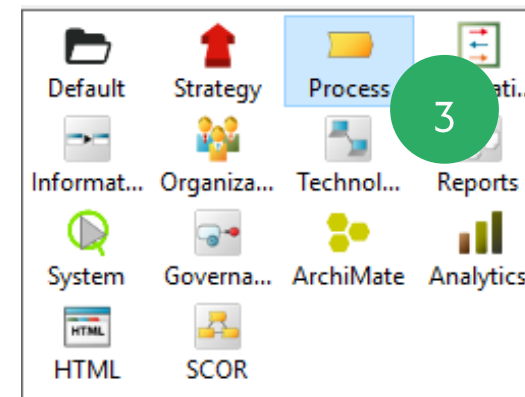
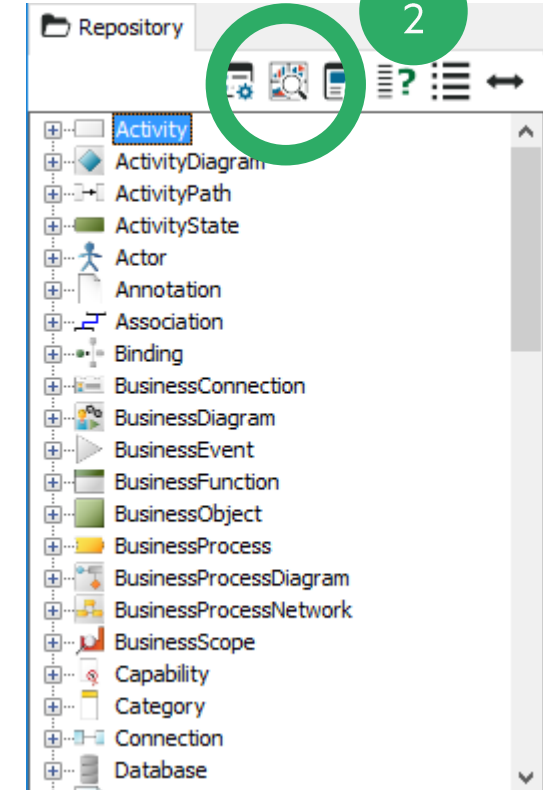
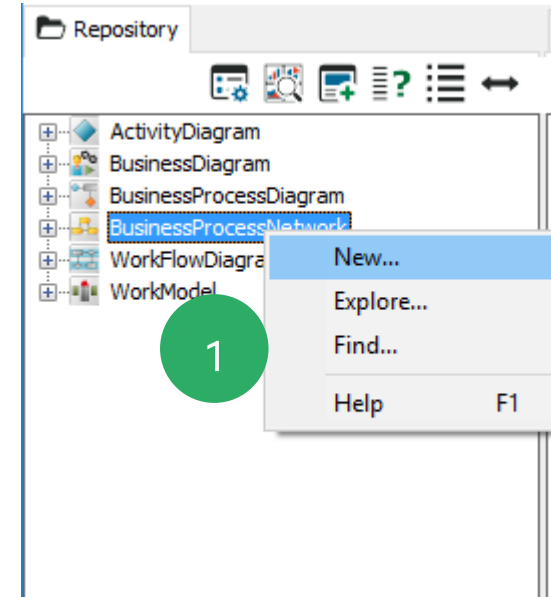
The screenshot displays the QualiWare workspace interface. A green circle highlights the 'Window' menu icon in the top toolbar. A green arrow points from this icon to a separate icon of two computer monitors on the left side of the image. Another green arrow points from a single computer monitor icon at the bottom center to the 'Properties' window at the bottom of the interface. The main workspace area shows a process diagram with yellow chevron-shaped activity nodes. The left sidebar contains a tree view of the 'QualiCar Processes' repository. The right sidebar lists various symbols and actions. The bottom status bar shows 'Revision: 2', 'Language: en-US', 'Repository: Demo', and 'Config: Development - Demo'.

# Create Repository Objects

1 Right-click in the repository explorer to create new objects

2 Show all templates

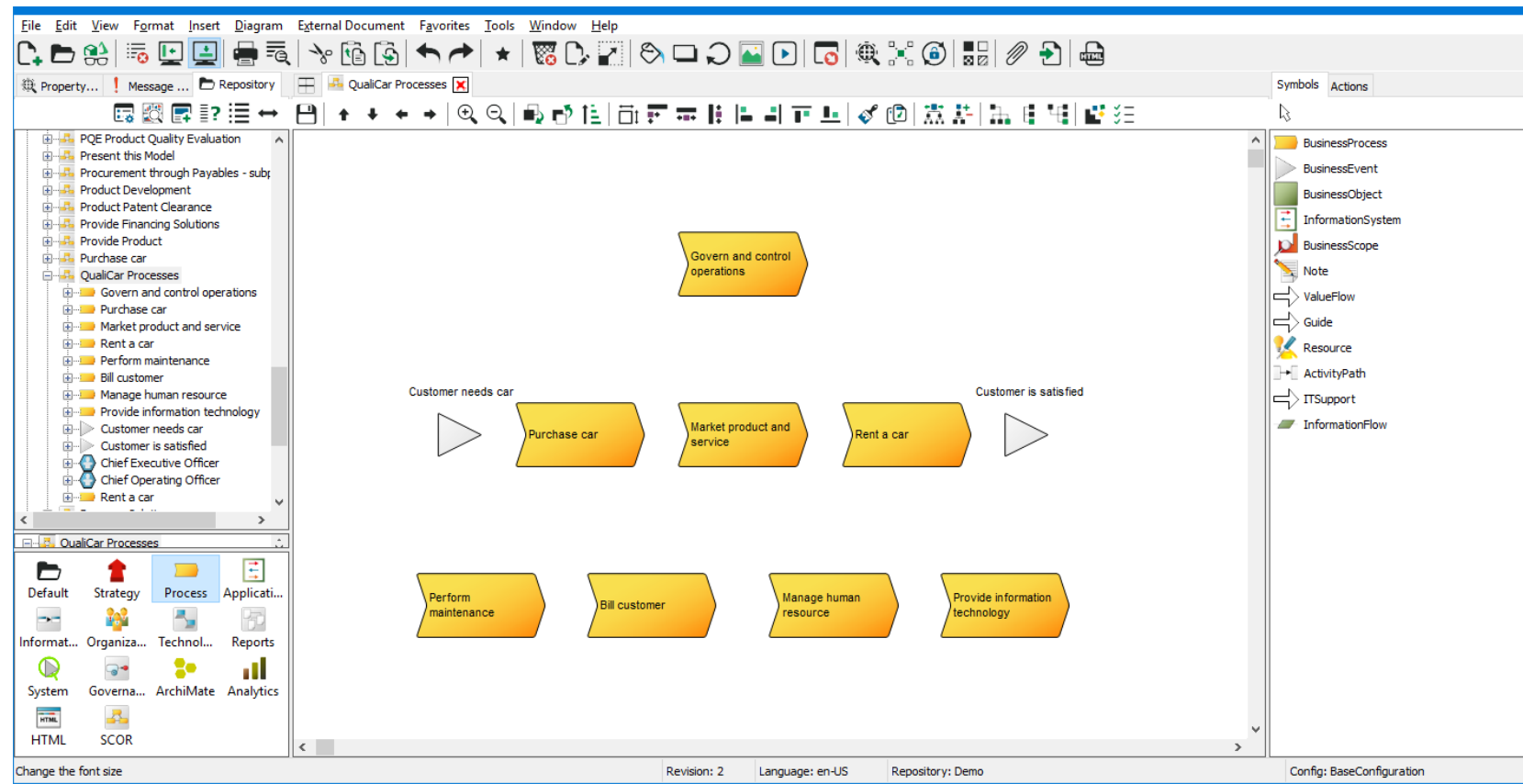
3 Use Repository Views



# Demo – Set-up and navigation

# Lesson 1: Set-up and navigation

- Purpose: Understand how to set-up your workspace and navigate the repository explorer.

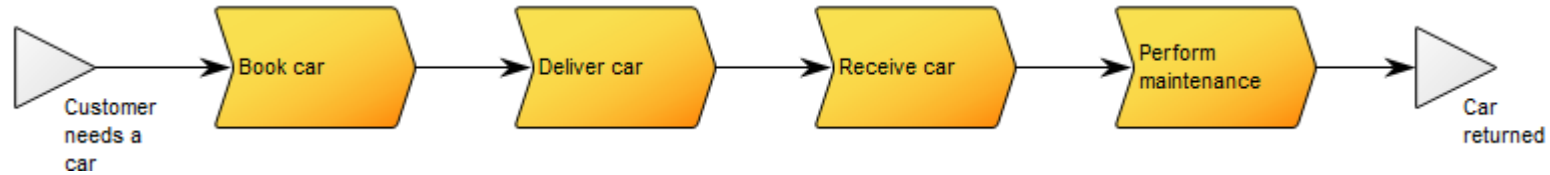




# How to draw a diagram

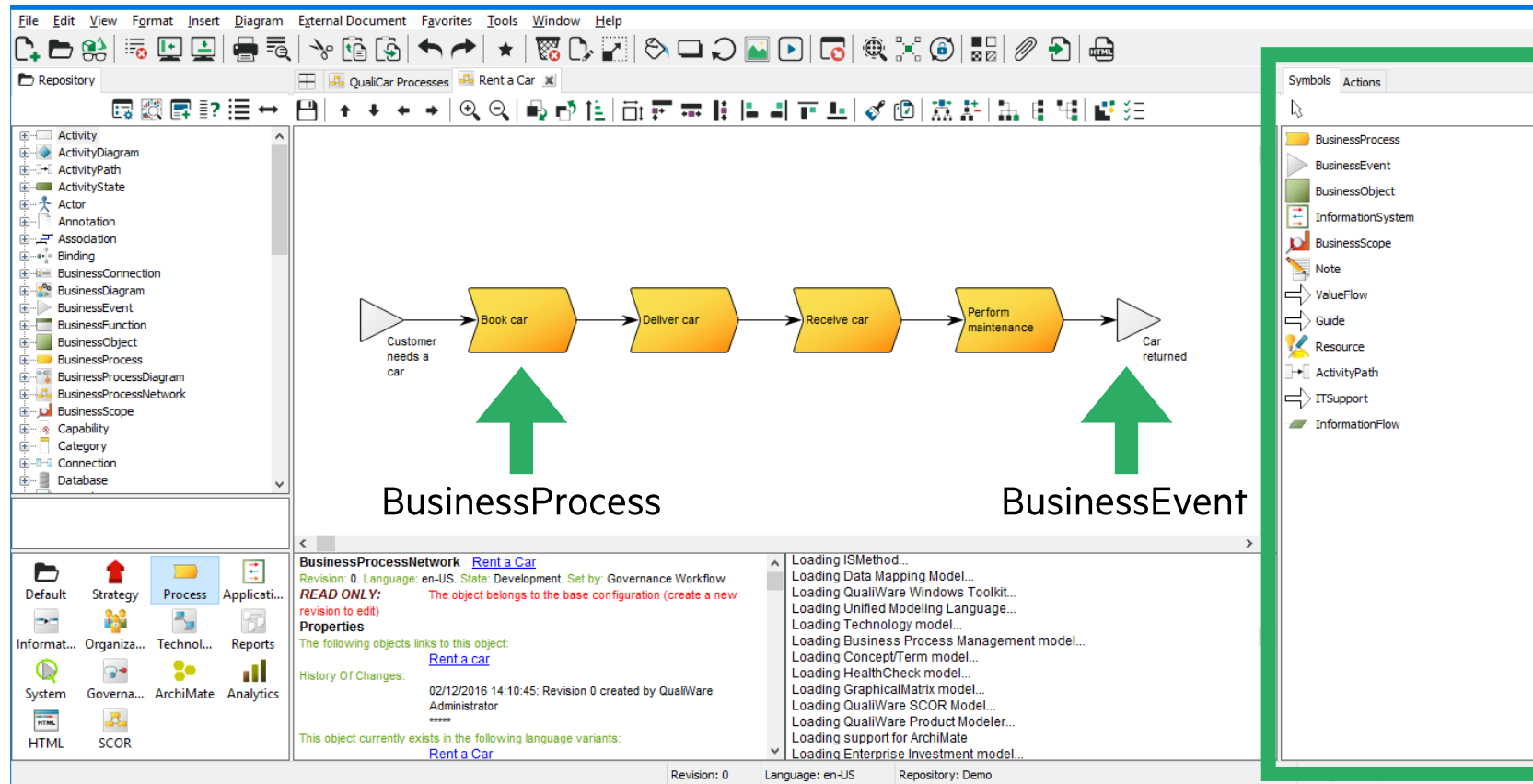
# Process modeling

Process modeling focuses on events, processes and their sequence.



# Process modeling

The diagram template BusinessProcessNetwork is used for describing processes



Available symbols

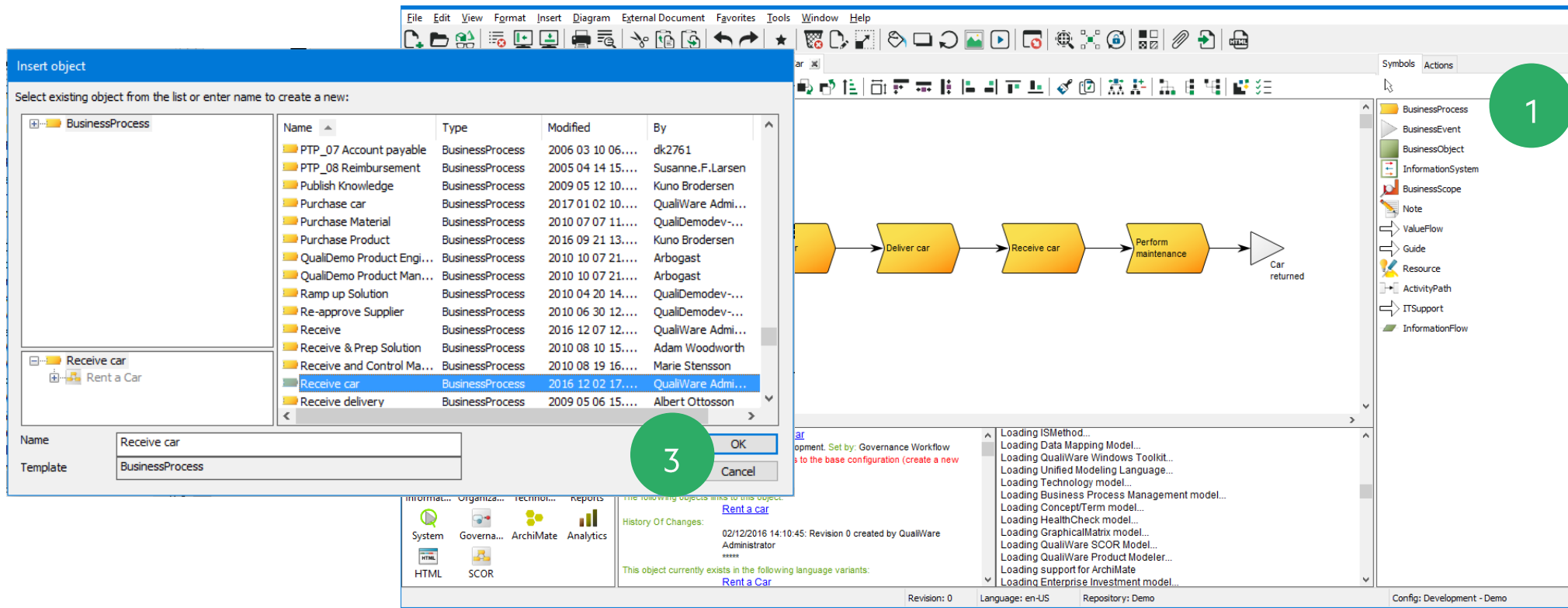


BusinessProcess

BusinessEvent

# Re-using symbols

- 1 Select the symbol **BusinessProcess** and place it on the diagram
- 2 Enter a name to create a new object or
- 3 Ctrl+L (or right click) to select and reuse an existing process

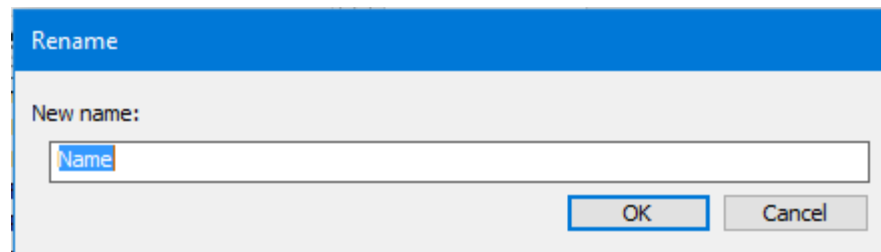
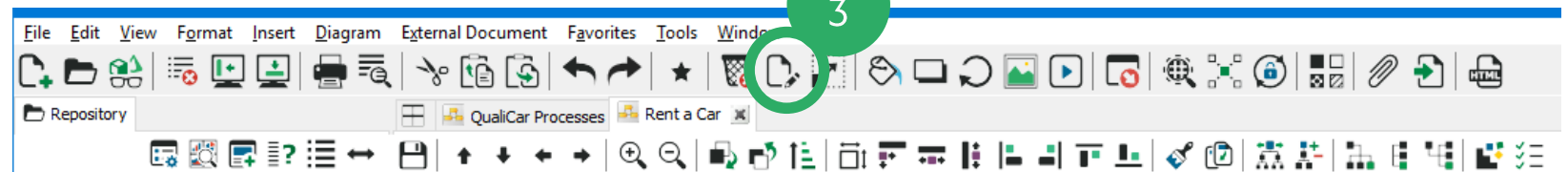
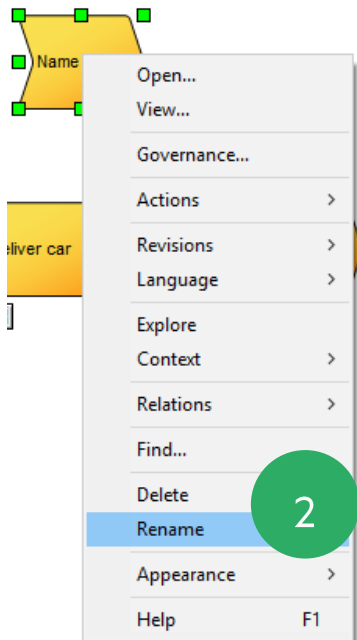
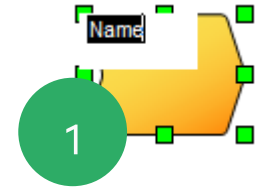


The screenshot displays the QualiWare software interface. An 'Insert object' dialog box is open, showing a list of existing BusinessProcess objects. The 'Receive car' object is selected. The diagram shows a flowchart with steps: Deliver car, Receive car, Perform maintenance, and Car returned. The 'BusinessProcess' symbol is highlighted in the Symbols panel on the right.

Name	Type	Modified	By
PTP_07 Account payable	BusinessProcess	2006 03 10 06...	dk2761
PTP_08 Reimbursement	BusinessProcess	2005 04 14 15...	Susanne.F.Larsen
Publish Knowledge	BusinessProcess	2009 05 12 10...	Kuno Brodersen
Purchase car	BusinessProcess	2017 01 02 10...	QualiWare Admi...
Purchase Material	BusinessProcess	2010 07 07 11...	QualiDemov-...
Purchase Product	BusinessProcess	2016 09 21 13...	Kuno Brodersen
QualiDemo Product Engi...	BusinessProcess	2010 10 07 21...	Arbogast
QualiDemo Product Man...	BusinessProcess	2010 10 07 21...	Arbogast
Ramp up Solution	BusinessProcess	2010 04 20 14...	QualiDemov-...
Re-approve Supplier	BusinessProcess	2010 06 30 12...	QualiDemov-...
Receive	BusinessProcess	2016 12 07 12...	QualiWare Admi...
Receive & Prep Solution	BusinessProcess	2010 08 10 15...	Adam Woodworth
Receive and Control Ma...	BusinessProcess	2010 08 19 16...	Marie Stensson
Receive car	BusinessProcess	2016 12 02 17...	QualiWare Admi...
Receive delivery	BusinessProcess	2009 05 06 15...	Albert Ottosson

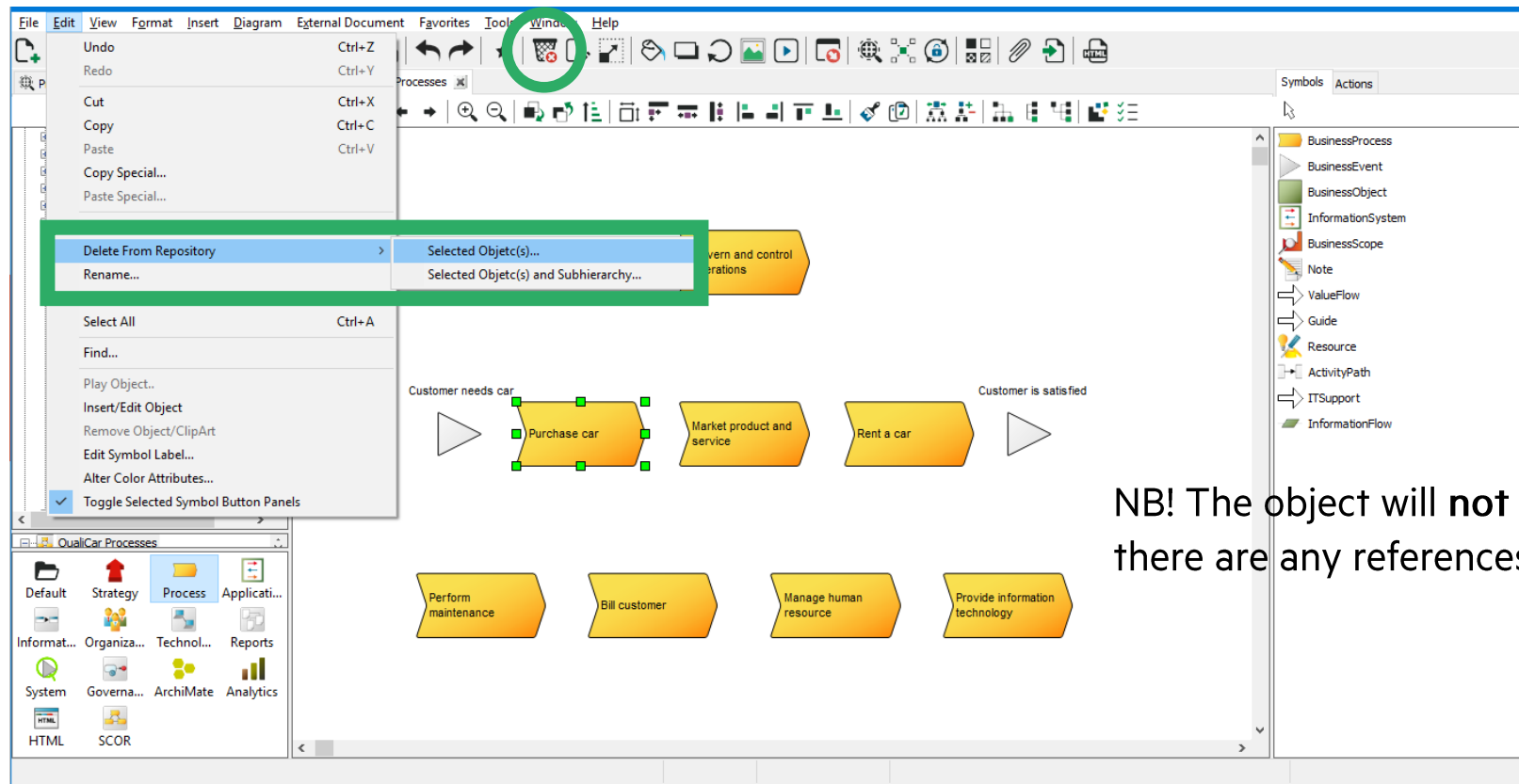
# Renaming symbols

- 1 Select the symbol, press **Alt-key** and click on the name to open the advanced label editor
- 2 Select the symbol, right-click and click **Rename** from the menu
- 3 Select the symbol, press the **Rename** button in the tool bar or press F2



# Deleting objects

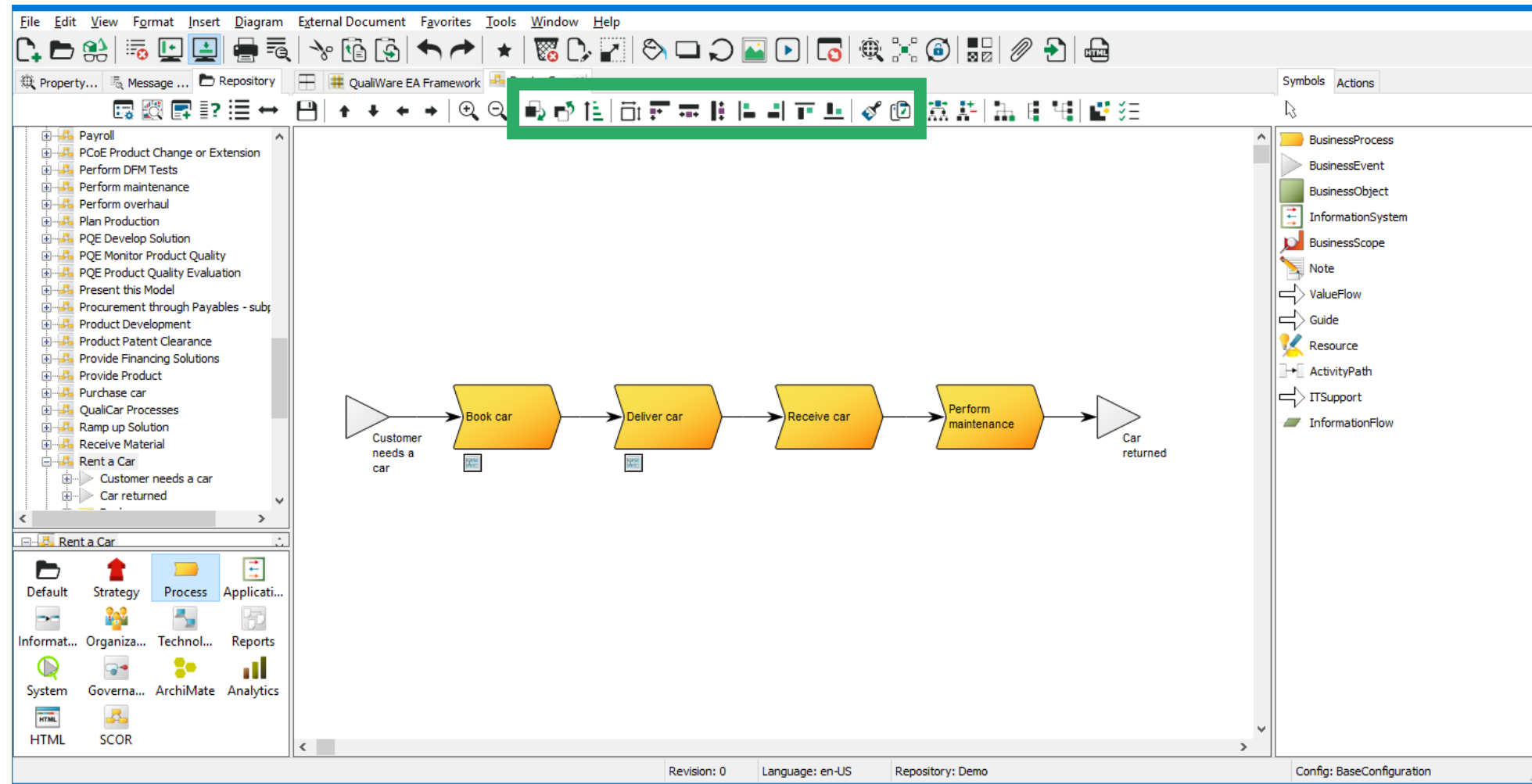
- Select the symbol, select **Delete** to remove the object from the diagram
- Select the symbol, select **Delete From Repository** to remove the object from the diagram and the database



NB! The object will not be removed if there are any references to it

# Editing

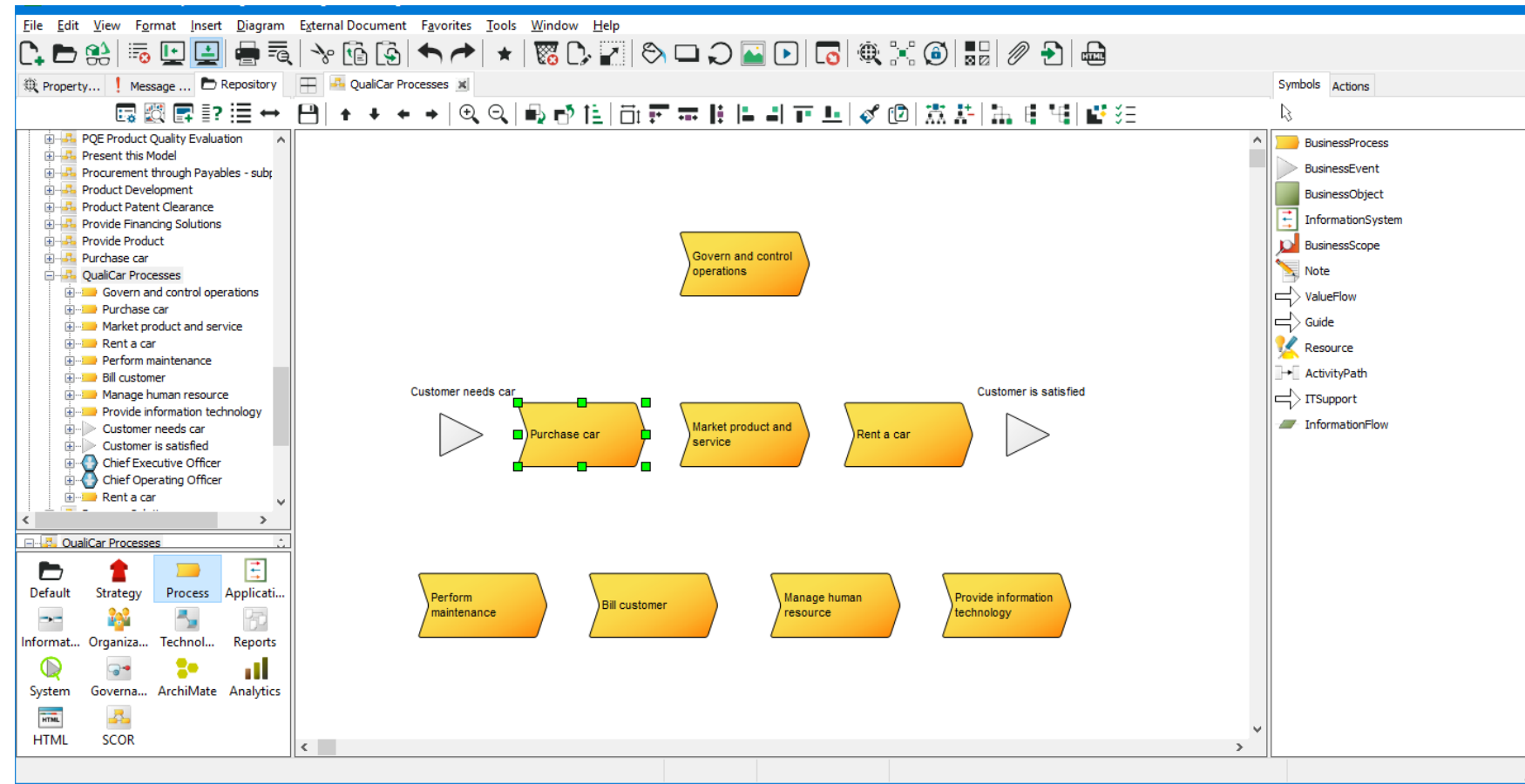
- The toolbar contains buttons for editing functionality



The screenshot displays the QualiWare EA Framework software interface. The main window shows a process diagram with the following steps: Customer needs a car (Start), Book car, Deliver car, Receive car, Perform maintenance, and Car returned (End). A green box highlights a toolbar containing various editing icons, including arrows, a magnifying glass, and a refresh symbol. The interface includes a menu bar (File, Edit, View, Format, Insert, Diagram, External Document, Favorites, Tools, Window, Help), a toolbar, a left-hand tree view listing various business processes, a right-hand palette with symbols and actions, and a bottom status bar showing Revision: 0, Language: en-US, Repository: Demo, and Config: BaseConfiguration.

# Symbol size

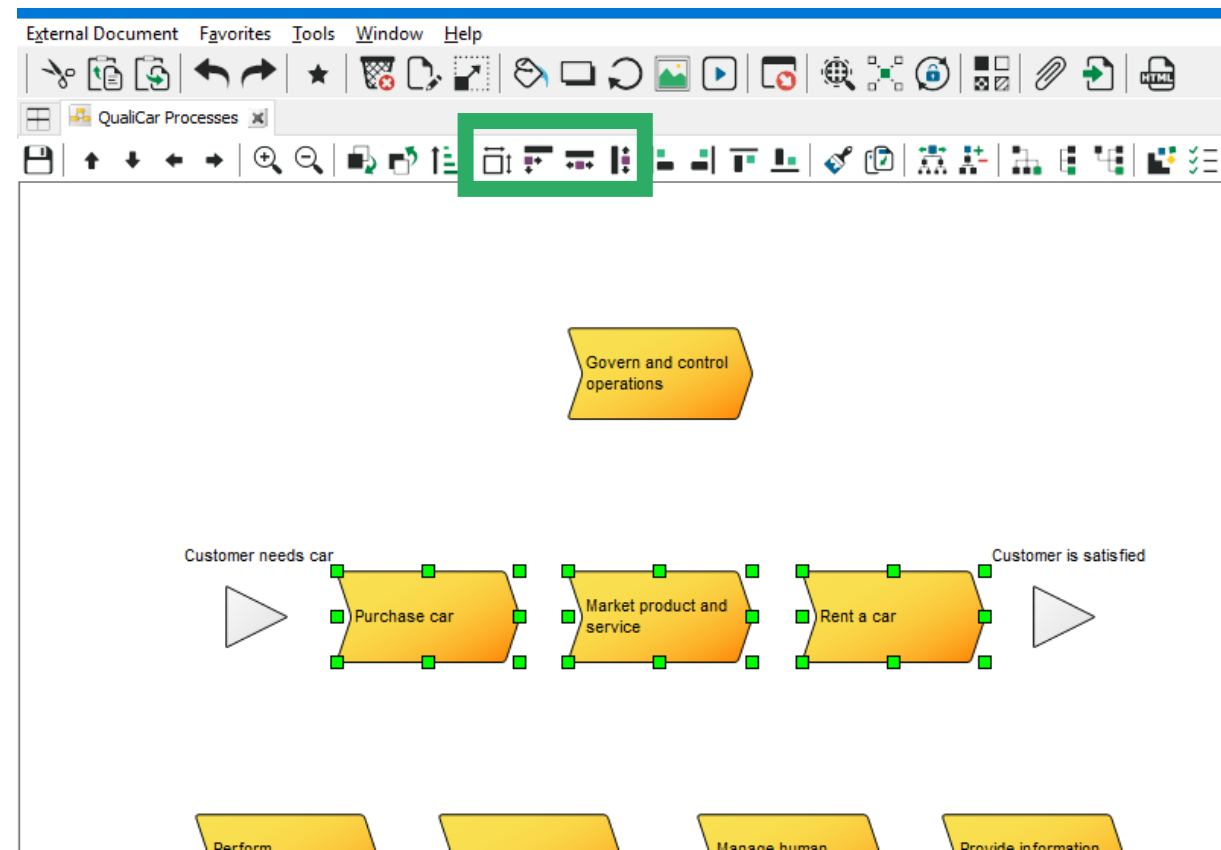
- You can change the size of any symbol.
- Select the object, get hold of a node and drag to desired size.





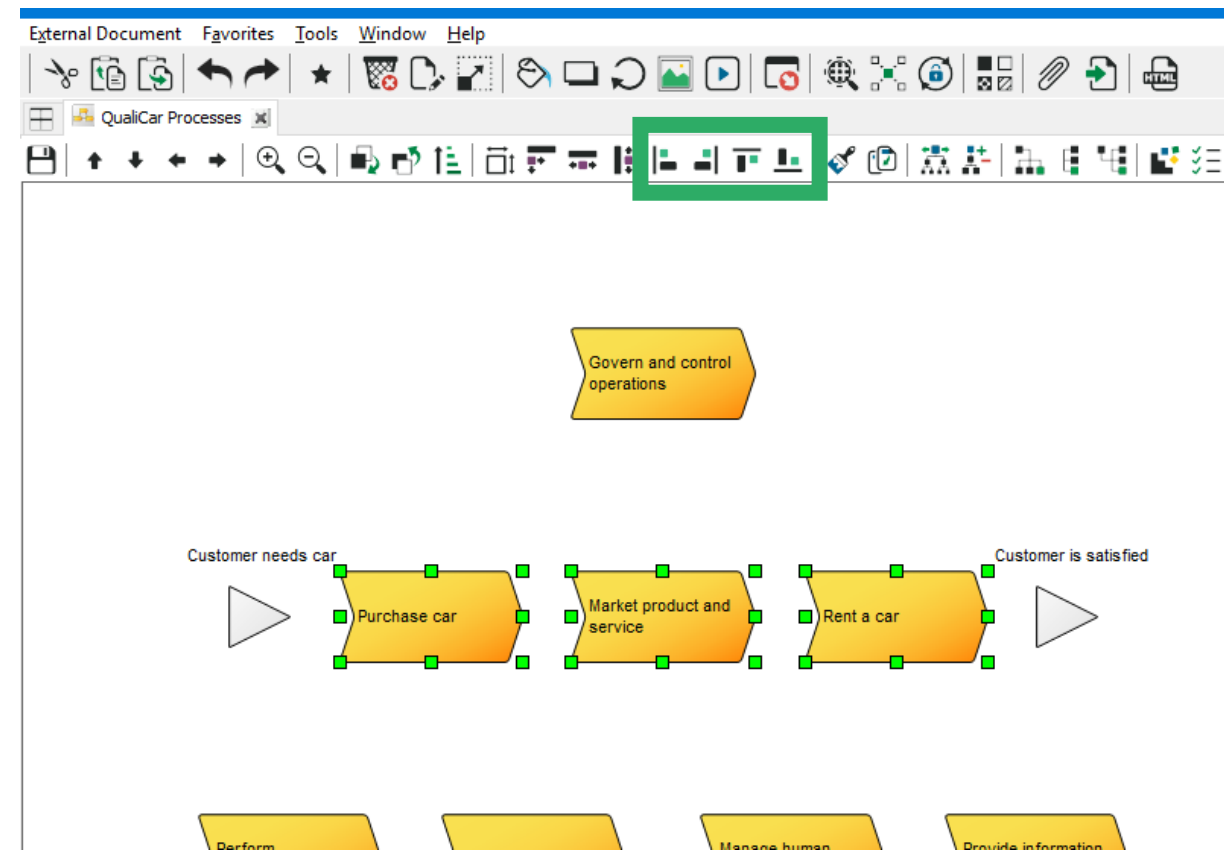
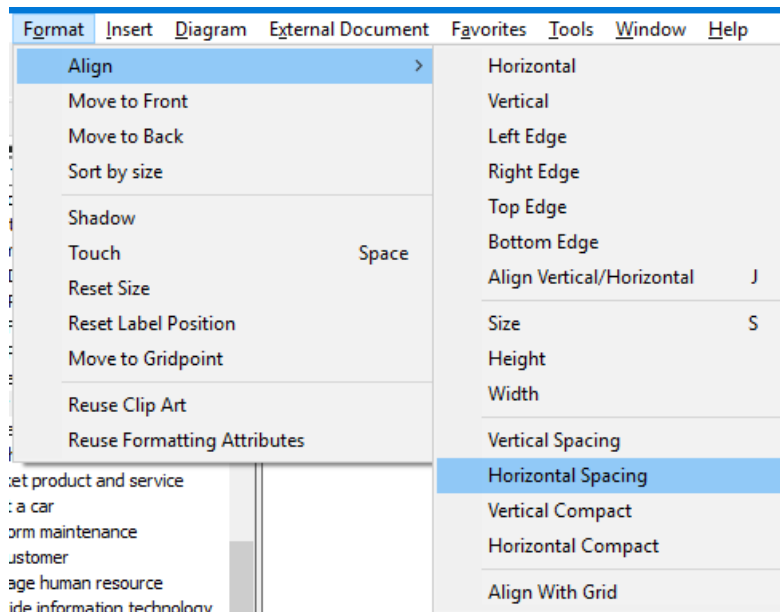
# Sizing

- Use the buttons in the toolbar to align symbols
  - Resize to original size
  - Align size (with first selected object)
  - Align width (with first selected object)
  - Align height (with first selected object)



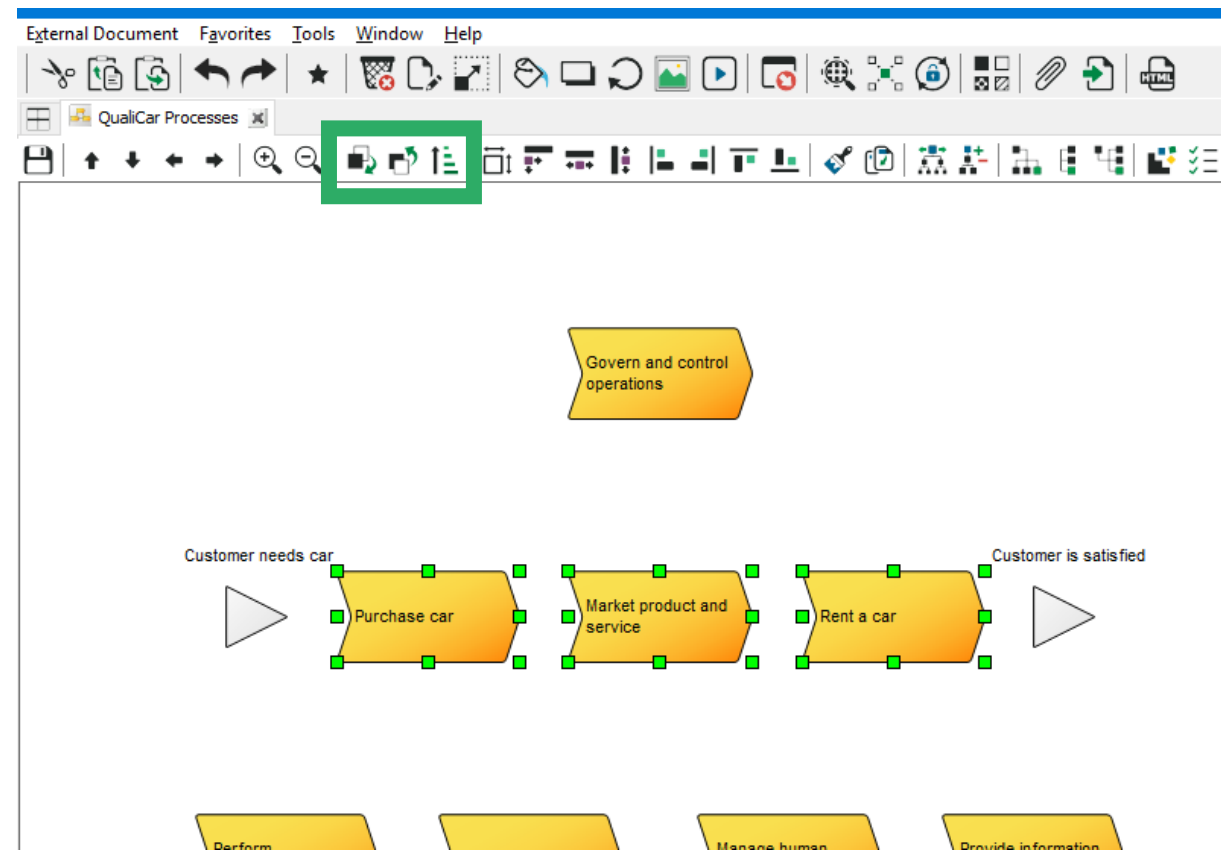
# Alignment

- Use the buttons in the toolbar to align symbols
  - Align left edge
  - Align right edge
  - Align top edge
  - Align bottom edge



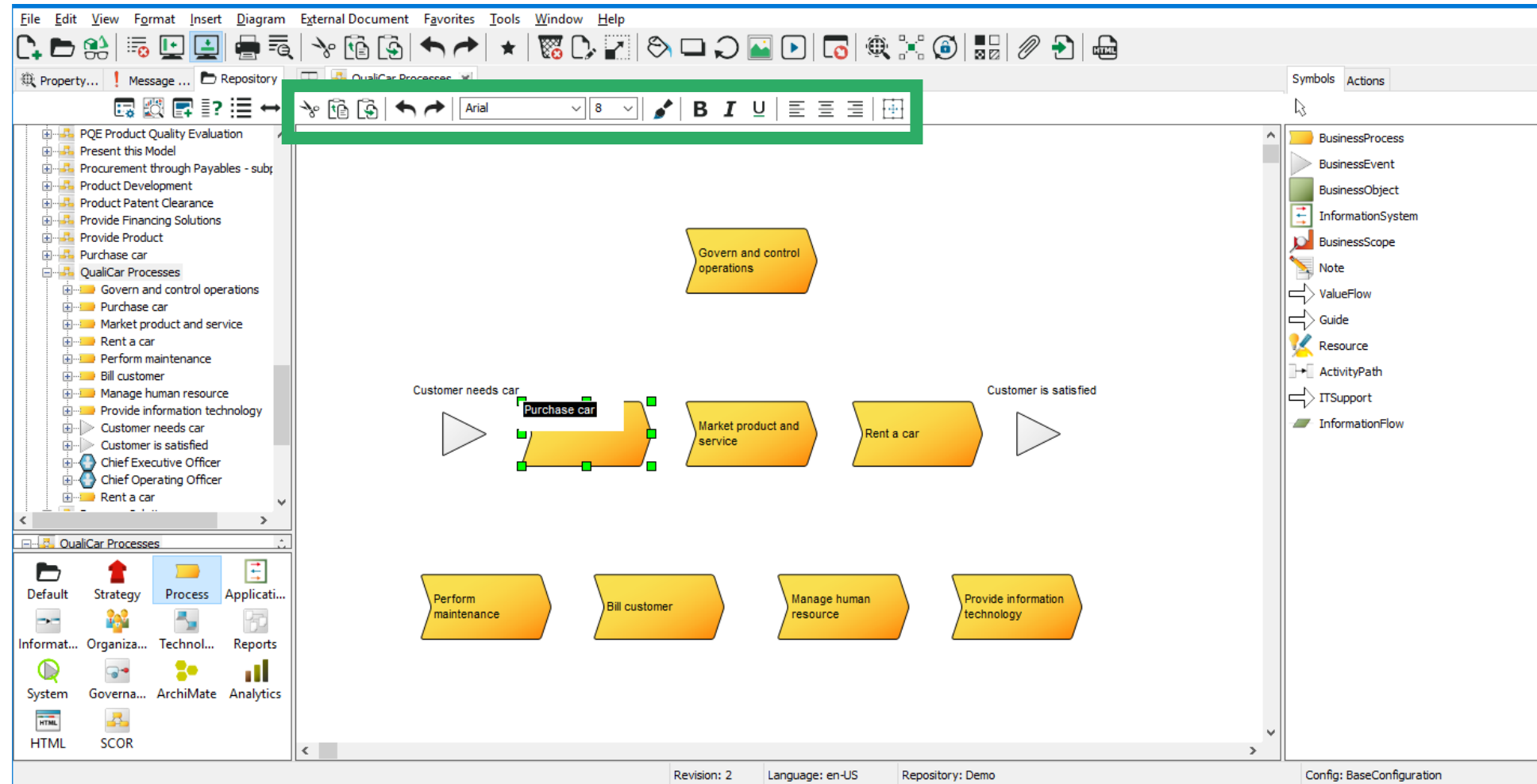
# Arrangement

- Use the buttons in the toolbar to move symbols to front or back



# Symbol label

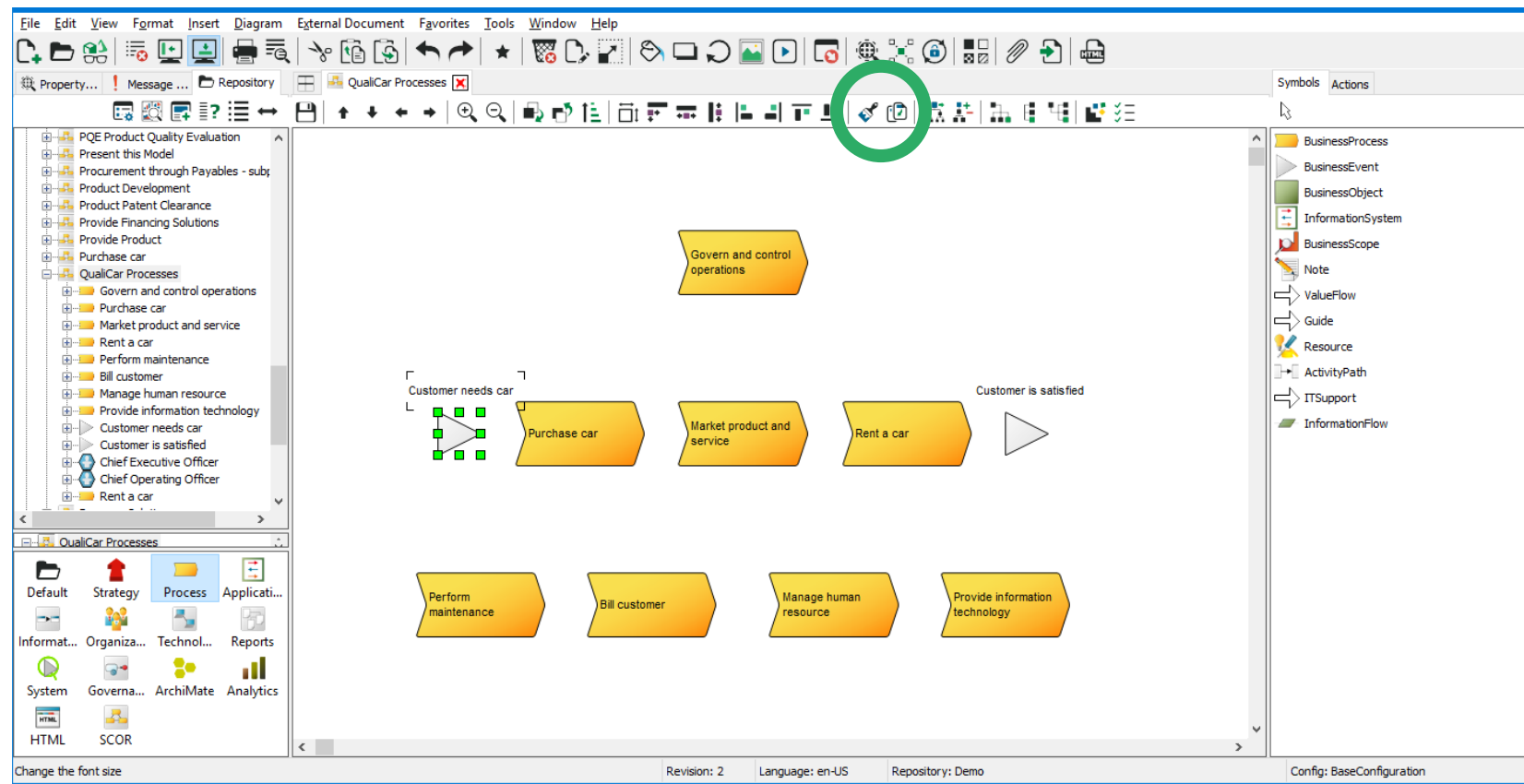
- Change the text format on a symbol



The screenshot displays the Qualiware software interface. The main workspace shows a process diagram with several yellow chevron-shaped symbols. One symbol, labeled "Purchase car", is selected and has a text format toolbar overlaid on it. This toolbar, highlighted with a green border, includes options for font face (Arial), font size (8), and text formatting (bold, italic, underline, bulleted list, numbered list, indent, and alignment). The diagram also includes other symbols like "Govern and control operations", "Market product and service", "Rent a car", "Perform maintenance", "Bill customer", "Manage human resource", and "Provide information technology". The interface includes a menu bar, a toolbar, a left-hand tree view, and a right-hand symbols palette.

# Move symbol label

- Use the **ALT** key when moving a label.
- Select the object, hold the **ALT** key down, click on the text and move the label to the preferred position.

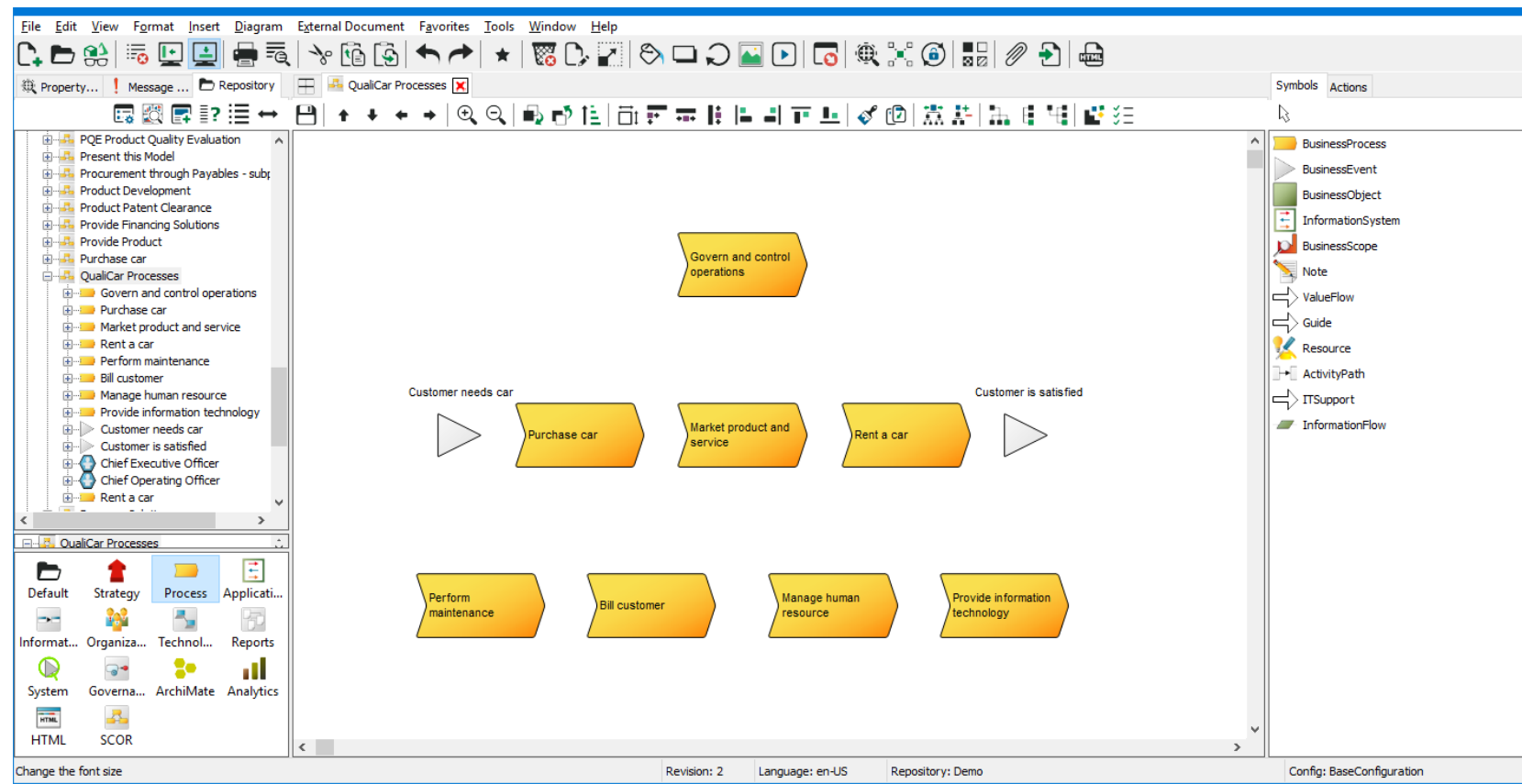




# Demo – Draw a diagram

# Lesson 2: Draw a diagram

- **Purpose:** To learn how to draw a diagram with different symbols and get to know the most common editing commands. During the exercise you will also learn how to rename an object, delete an object and reuse an object.





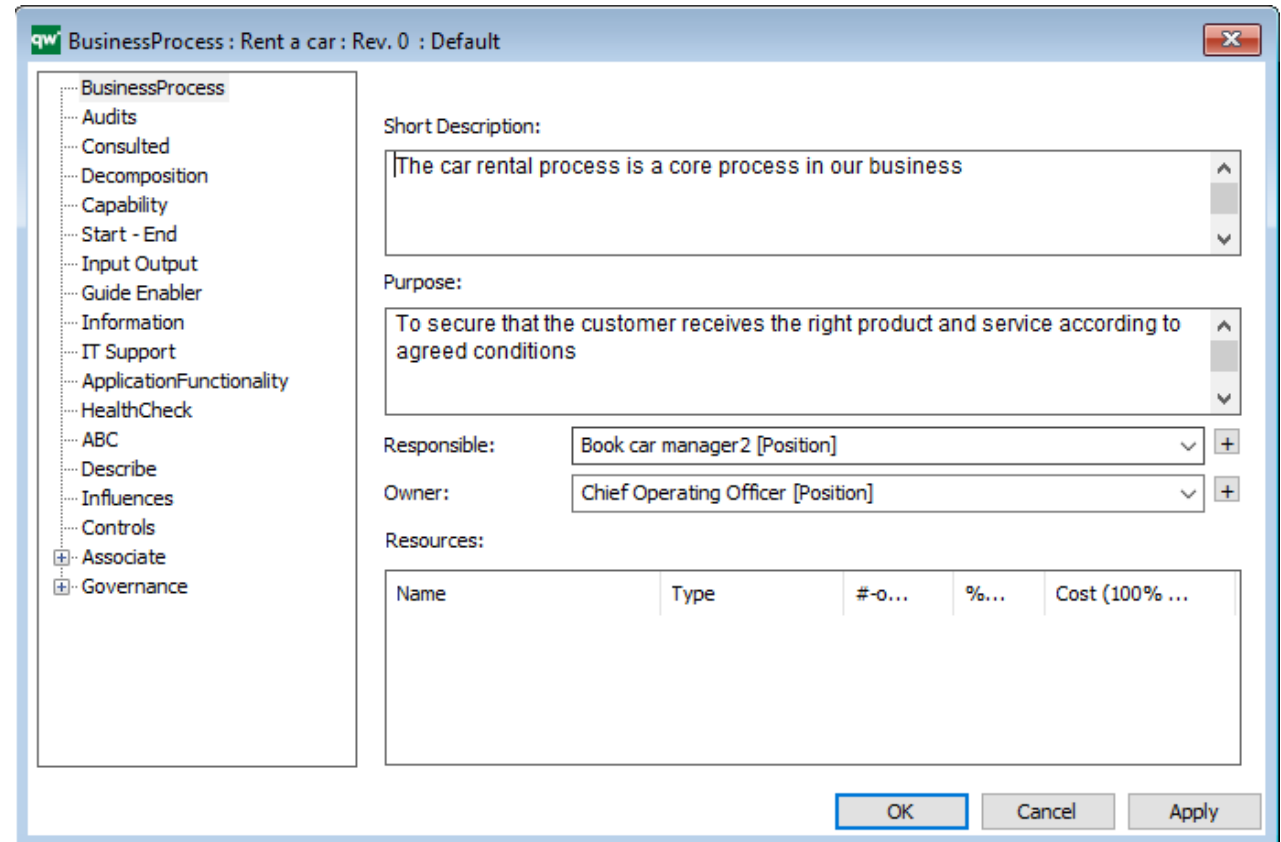
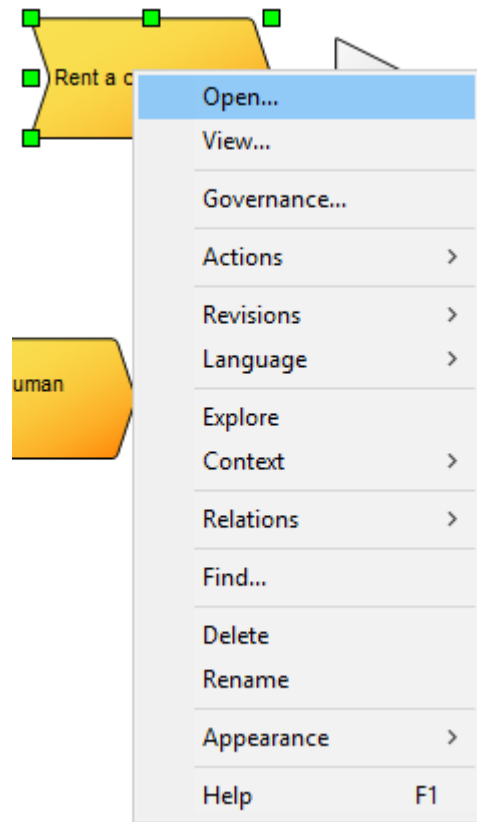
**qualiware**<sup>®</sup>  
Enabling positive change

**Describe a process**

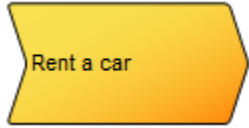


# Describe a process

- To open the dialog for the component:
  - Select the symbol, right-click and click **Open...**
  - Select the symbol and press shortcut key **B**



# Describe a process



## Properties for BusinessProcess

BusinessProcess : Rent a car : Rev. 0 : Default

BusinessProcess

- Audits
- Consulted
- Decomposition
- Capability
- Start - End
- Input Output
- Guide Enabler
- Information
- IT Support
- ApplicationFunctionality
- HealthCheck
- ABC
- Describe
- Influences
- Controls
- Associate
- Governance

Short Description:  
The car rental process is a core process in our business

Purpose:  
To secure that the customer receives the right product and service according to agreed conditions

Responsible: Rent a car Manager [Position]

Owner: Chief Operating Officer [Position]

Resources:

Name	Type	#-o...	%...	Cost (100% ...
------	------	--------	------	----------------

OK Cancel Apply



Short description  
Text field



Purpose Text field

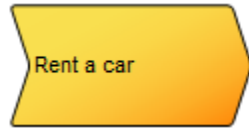


Responsible  
Link to a person, role, org.unit, position

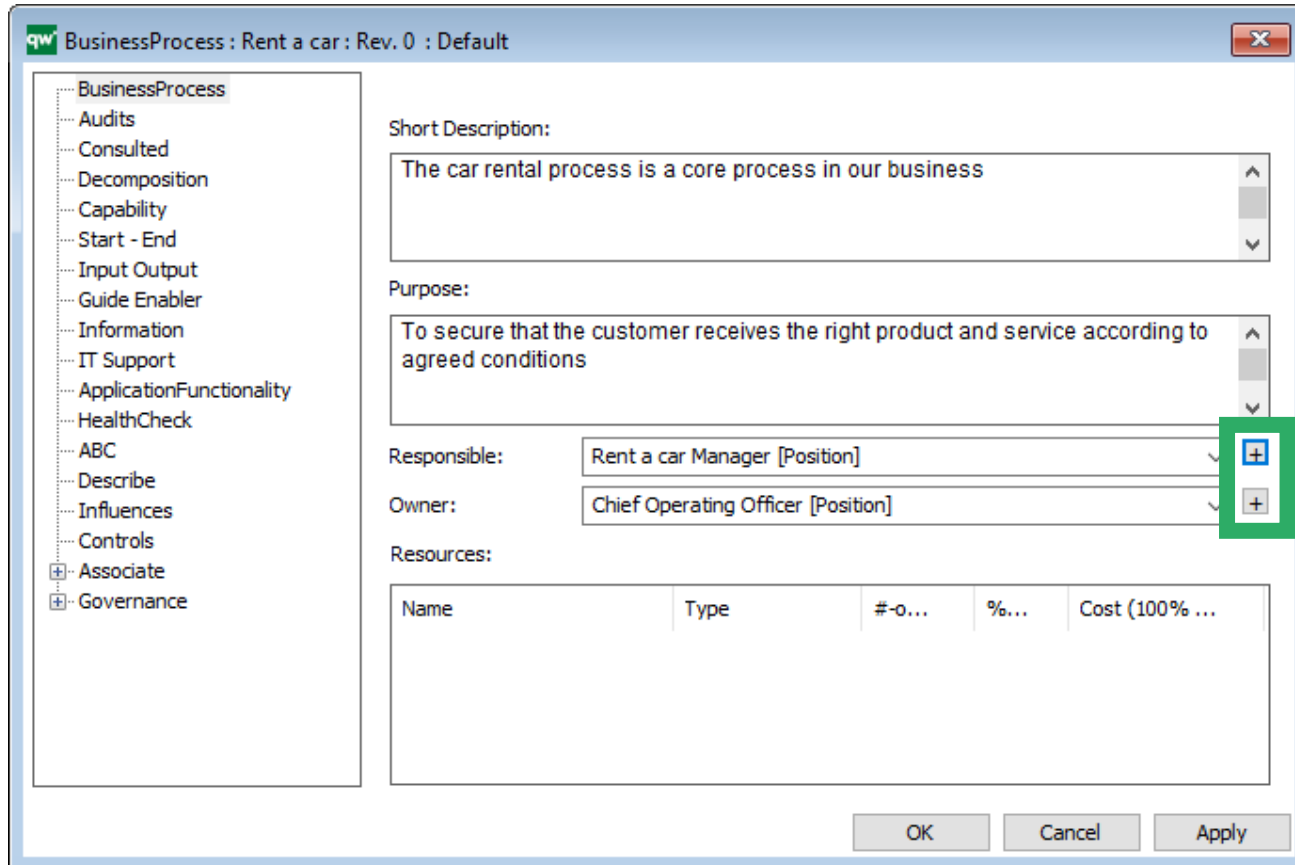


Resources  
Link to a person, role, org.unit,  
position, resource, business object

# Select responsible for a process



## Properties for BusinessProcess




BusinessProcess : Rent a car : Rev. 0 : Default


BusinessProcess

- Audits
- Consulted
- Decomposition
- Capability
- Start - End
- Input Output
- Guide Enabler
- Information
- IT Support
- ApplicationFunctionality
- HealthCheck
- ABC
- Describe
- Influences
- Controls
- Associate
- Governance

Short Description:  
The car rental process is a core process in our business

Purpose:  
To secure that the customer receives the right product and service according to agreed conditions

Responsible: Rent a car Manager [Position] 

Owner: Chief Operating Officer [Position] 

Resources:

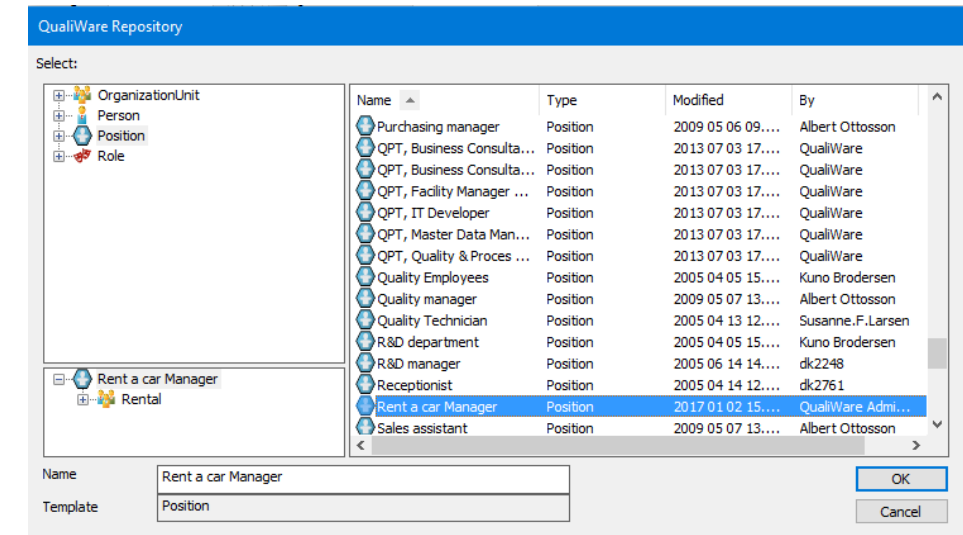
Name	Type	#-o...	%...	Cost (100% ...
------	------	--------	------	----------------

OK Cancel Apply

Press the + button to create a link to an object

Select a template

Select existing object or create a new



QualiWare Repository

Select:

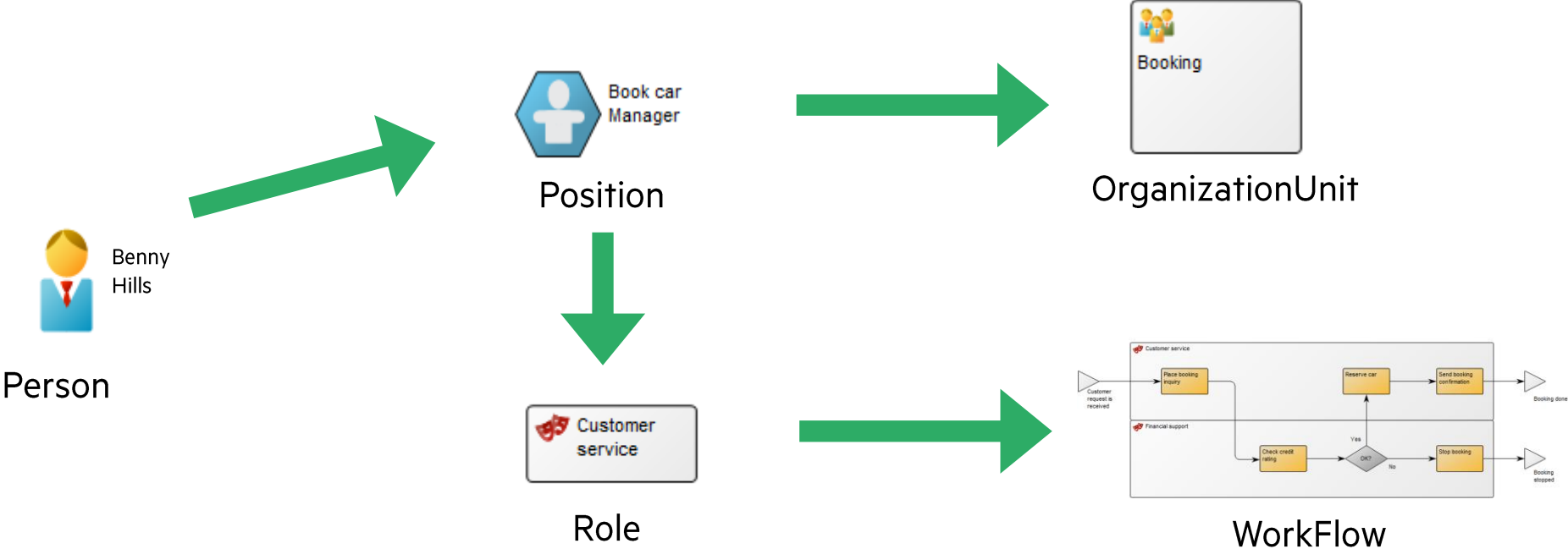
Name	Type	Modified	By
OrganizationUnit			
Person			
Position			
Role			
Purchasing manager	Position	2009 05 06 09....	Albert Ottosson
QPT, Business Consulta...	Position	2013 07 03 17....	QualiWare
QPT, Business Consulta...	Position	2013 07 03 17....	QualiWare
QPT, Facility Manager ...	Position	2013 07 03 17....	QualiWare
QPT, IT Developer	Position	2013 07 03 17....	QualiWare
QPT, Master Data Man...	Position	2013 07 03 17....	QualiWare
QPT, Quality & Proces ...	Position	2013 07 03 17....	QualiWare
Quality Employees	Position	2005 04 05 15....	Kuno Brodersen
Quality manager	Position	2009 05 07 13....	Albert Ottosson
Quality Technician	Position	2005 04 13 12....	Susanne.F.Larsen
R&D department	Position	2005 04 05 15....	Kuno Brodersen
R&D manager	Position	2005 06 14 14....	dk2248
Receptionist	Position	2005 04 14 12....	dk2761
Rent a car Manager	Position	2017 01 02 15....	QualiWare Admi...
Sales assistant	Position	2009 05 07 13....	Albert Ottosson

Name: Rent a car Manager

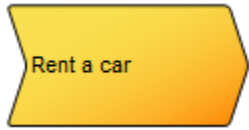
Template: Position

OK Cancel

# Relations organization - process



# Define resources for a process



Right click in the listview field, select  
**Insert**

Select template

Select existing object or create a new one

## Properties for BusinessProcess

QualiWare Repository

Select:

- BusinessRule
- Policy
- Principle:ArchiMate
- Regulation
- Requirement
- Requirement:ArchiMate

Name	Type	Modified	By
New Regulation	Regulation	2017 01 04 15...	QualiWare Admi...
Warranty act	Regulation	2016 12 29 13...	QualiWare Admi...
Auto rental legislation a...	Regulation	2016 12 29 13...	QualiWare Admi...
Contract law	Regulation	2016 12 29 13...	QualiWare Admi...
ISO 9001:2008	Regulation	2016 09 26 14...	QualiWare Admi...
Security standard	Regulation	2015 05 01 11...	Kuno Brodersen
ISO 11616:2012 - 8 Co...	Regulation	2015 04 30 22...	Kuno Brodersen
ISO 11616:2012 - 7 Rel...	Regulation	2015 04 30 22...	Kuno Brodersen
ISO 11616:2012 - 6.2...	Regulation	2015 04 30 22...	Kuno Brodersen
ISO 11616:2012 - 6.2...	Regulation	2015 04 30 22...	Kuno Brodersen
ISO 11616:2012 - 6.2...	Regulation	2015 04 30 22...	Kuno Brodersen
ISO 11616:2012 - 6.2...	Regulation	2015 04 30 22...	Kuno Brodersen
ISO 11616:2012 - 6.2...	Regulation	2015 04 30 22...	Kuno Brodersen
ISO 11616:2012 - 6.2...	Regulation	2015 04 30 22...	Kuno Brodersen
ISO 11616:2012 - 6.2 P...	Regulation	2015 04 30 22...	Kuno Brodersen

Name:

Template:

OK Cancel

BusinessProcess : Rent a car : Rev. 0 : Default

- Consulted
- Decomposition
- Capability
- Start - End
- Input Output
- Guide Enabler
- Information
- IT Support
- ApplicationFunctionality
- HealthCheck
- ABC
- Describe
- Influences
- Controls
- Associate
  - RelationContext
  - Strategy
  - Target
  - Performance
  - Compliance
  - Documents
  - InherentRisk
  - Other
- Governance

Compliance with:

Name	Type	W...	Pct Co...	Comment
Contract law	Regulation			
Auto rental legislation and regulation	Regulation			
Warranty act	Regulation			

Insert...  
New

OK Cancel Apply

# Relations between objects

## BusinessProcess – tab 'BusinessProcess'

**To access (open) a reference:**

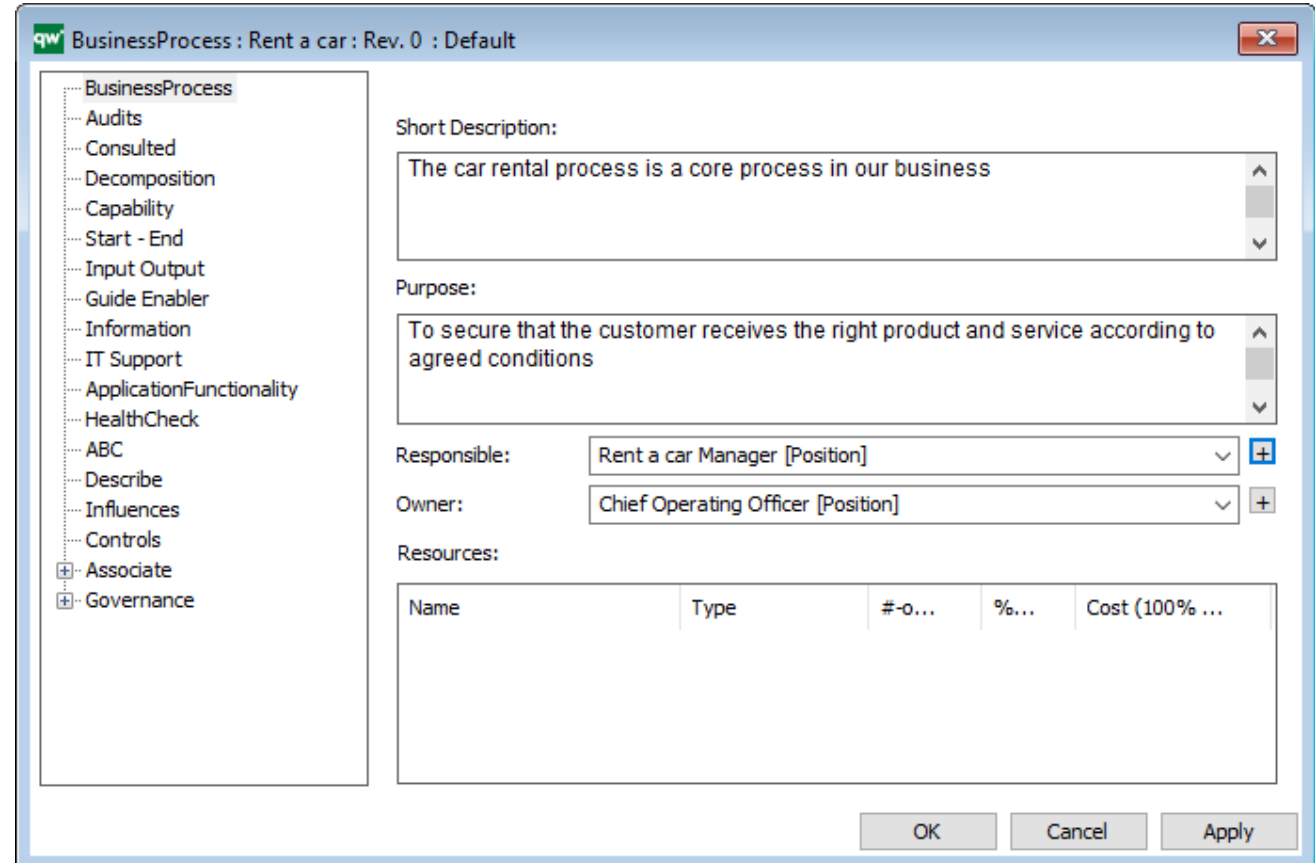
- Double-click (listviews)
- Press + button (single-links)

**To delete the link to an object:**

- Select and press DELETE (listviews)

**Change the sequence of objects in a listview:**

- Select and drag to the desired position



BusinessProcess : Rent a car : Rev. 0 : Default

BusinessProcess

Audits

Consulted

Decomposition

Capability

Start - End

Input Output

Guide Enabler

Information

IT Support

ApplicationFunctionality

HealthCheck

ABC

Describe

Influences

Controls

Associate

Governance

Short Description:

The car rental process is a core process in our business

Purpose:

To secure that the customer receives the right product and service according to agreed conditions

Responsible: Rent a car Manager [Position]

Owner: Chief Operating Officer [Position]

Resources:

Name	Type	#-o...	%...	Cost (100% ...
------	------	--------	------	----------------

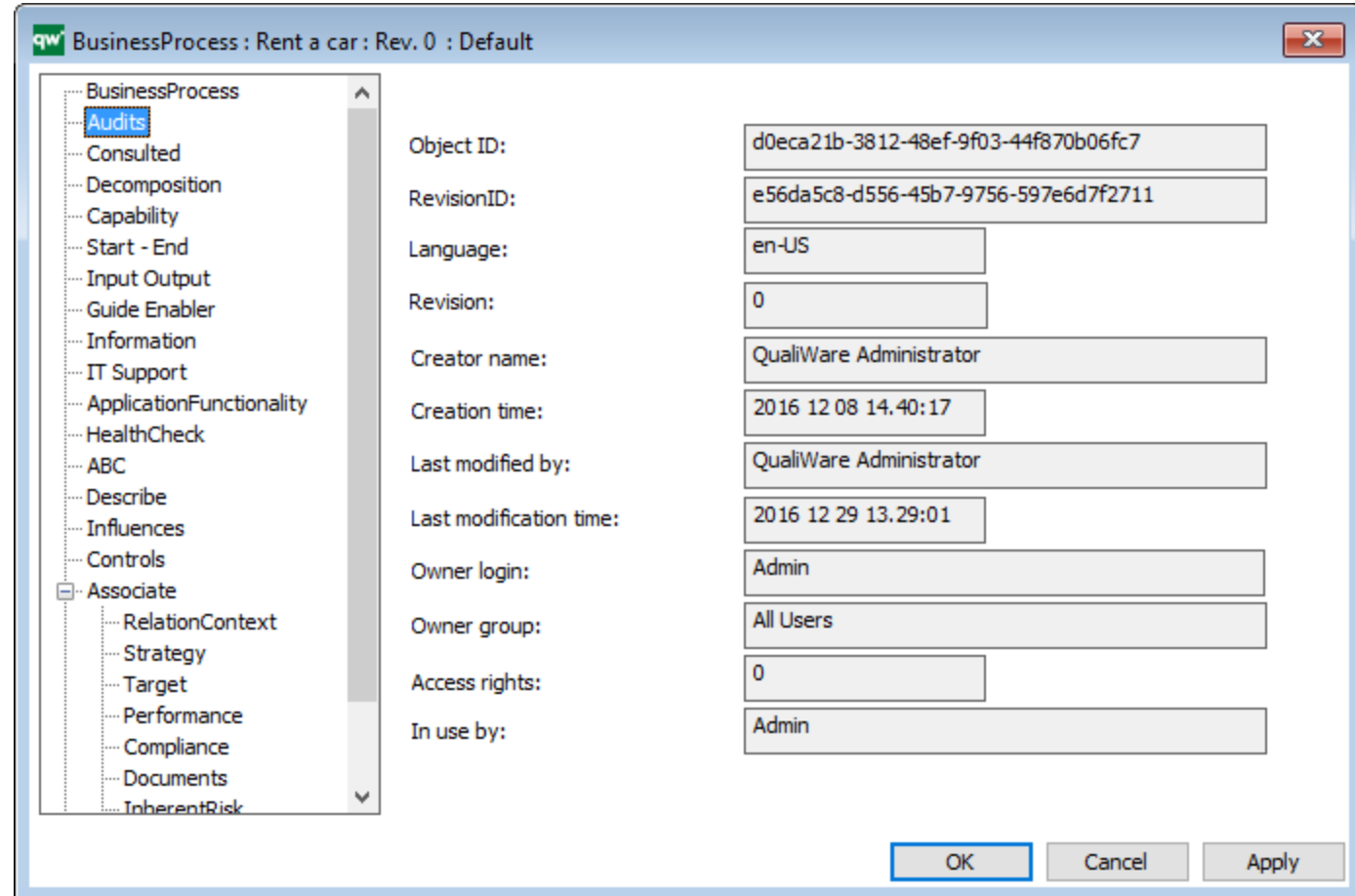
OK Cancel Apply

# Audit information

## BusinessProcess – tab 'Audits'

### Audit information about;

- Object ID
- Creator name and time
- Changed by and when
- Access rights
- Who uses the object now

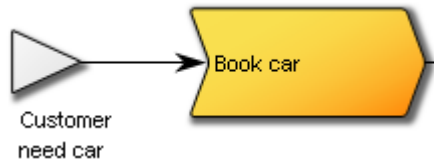


The screenshot shows a software window titled "BusinessProcess : Rent a car : Rev. 0 : Default". On the left is a tree view with "Audits" selected. On the right is a form with the following fields:

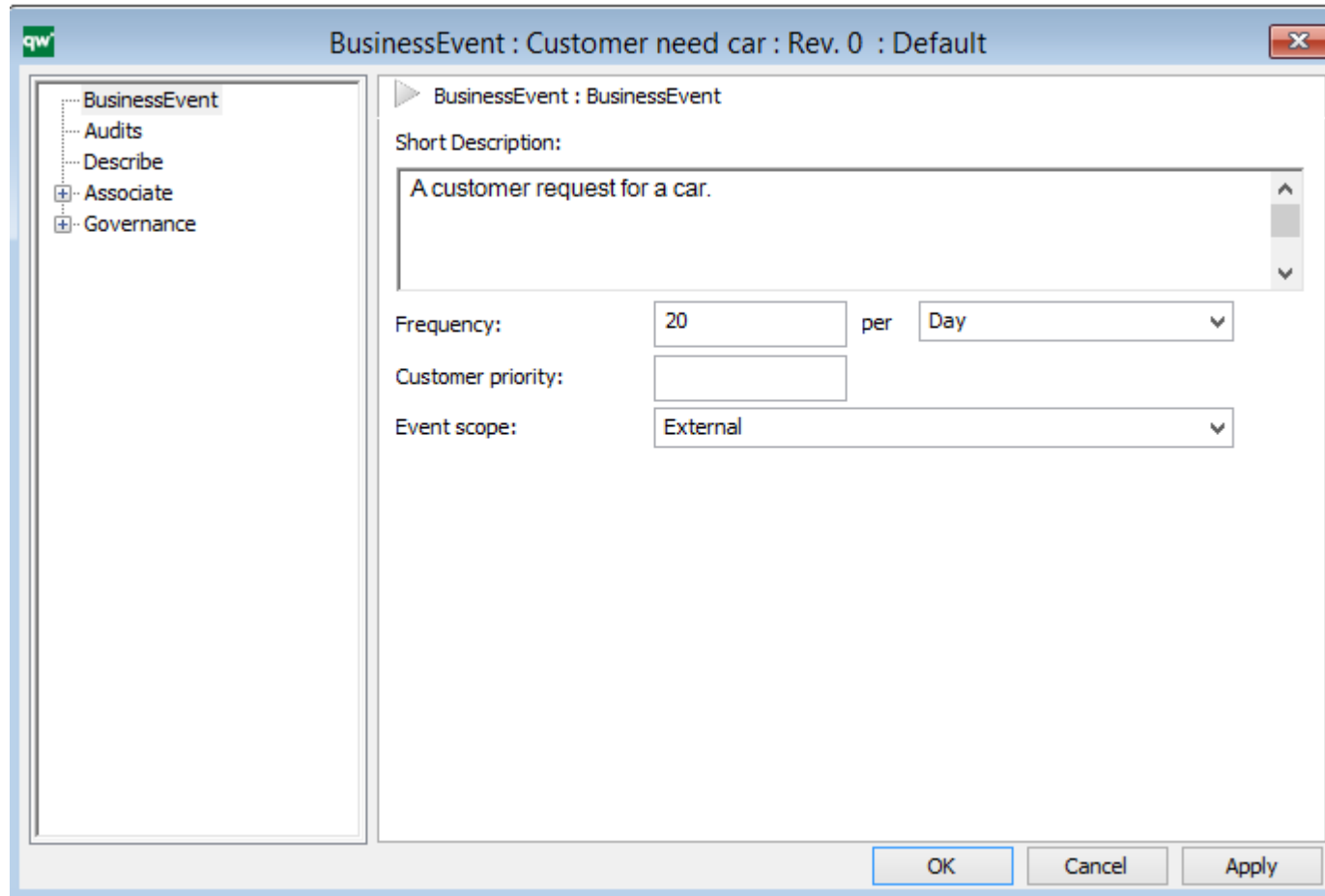
Object ID:	d0eca21b-3812-48ef-9f03-44f870b06fc7
RevisionID:	e56da5c8-d556-45b7-9756-597e6d7f2711
Language:	en-US
Revision:	0
Creator name:	QualiWare Administrator
Creation time:	2016 12 08 14.40:17
Last modified by:	QualiWare Administrator
Last modification time:	2016 12 29 13.29:01
Owner login:	Admin
Owner group:	All Users
Access rights:	0
In use by:	Admin

At the bottom right are buttons for "OK", "Cancel", and "Apply".

# BusinessEvent



## Properties for BusinessEvent



BusinessEvent : Customer need car : Rev. 0 : Default

BusinessEvent : BusinessEvent

Short Description:  
A customer request for a car.

Frequency: 20 per Day

Customer priority:

Event scope: External

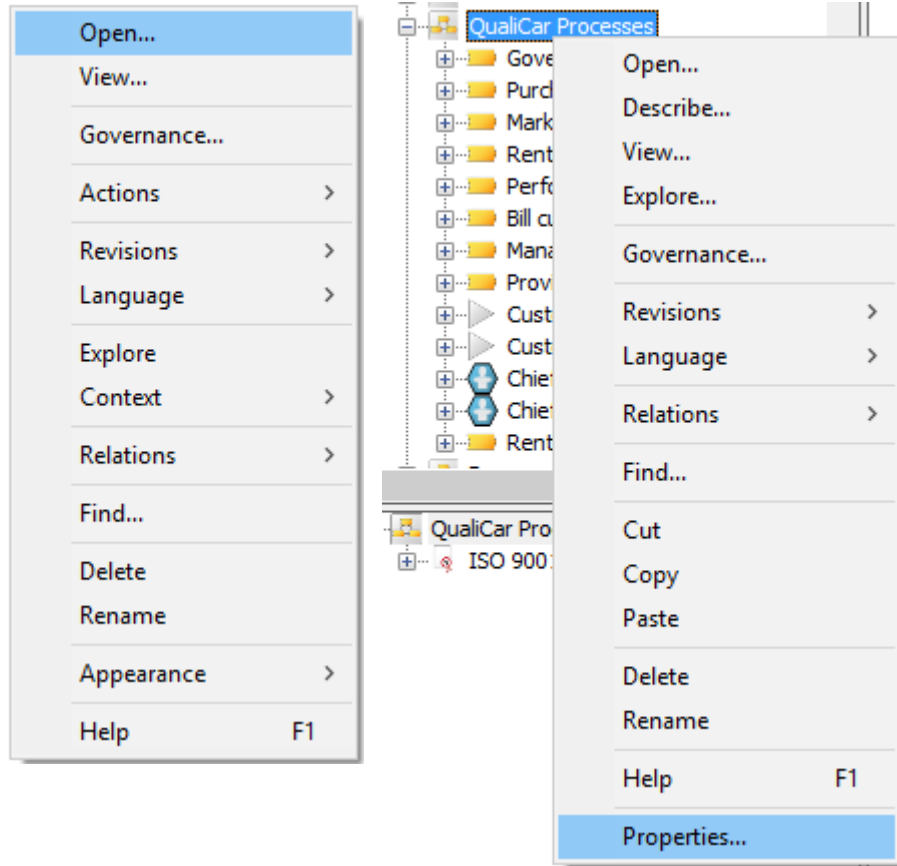
OK Cancel Apply

- ← Short description
- ← Frequency
- ← Priority
- ← Type of scope

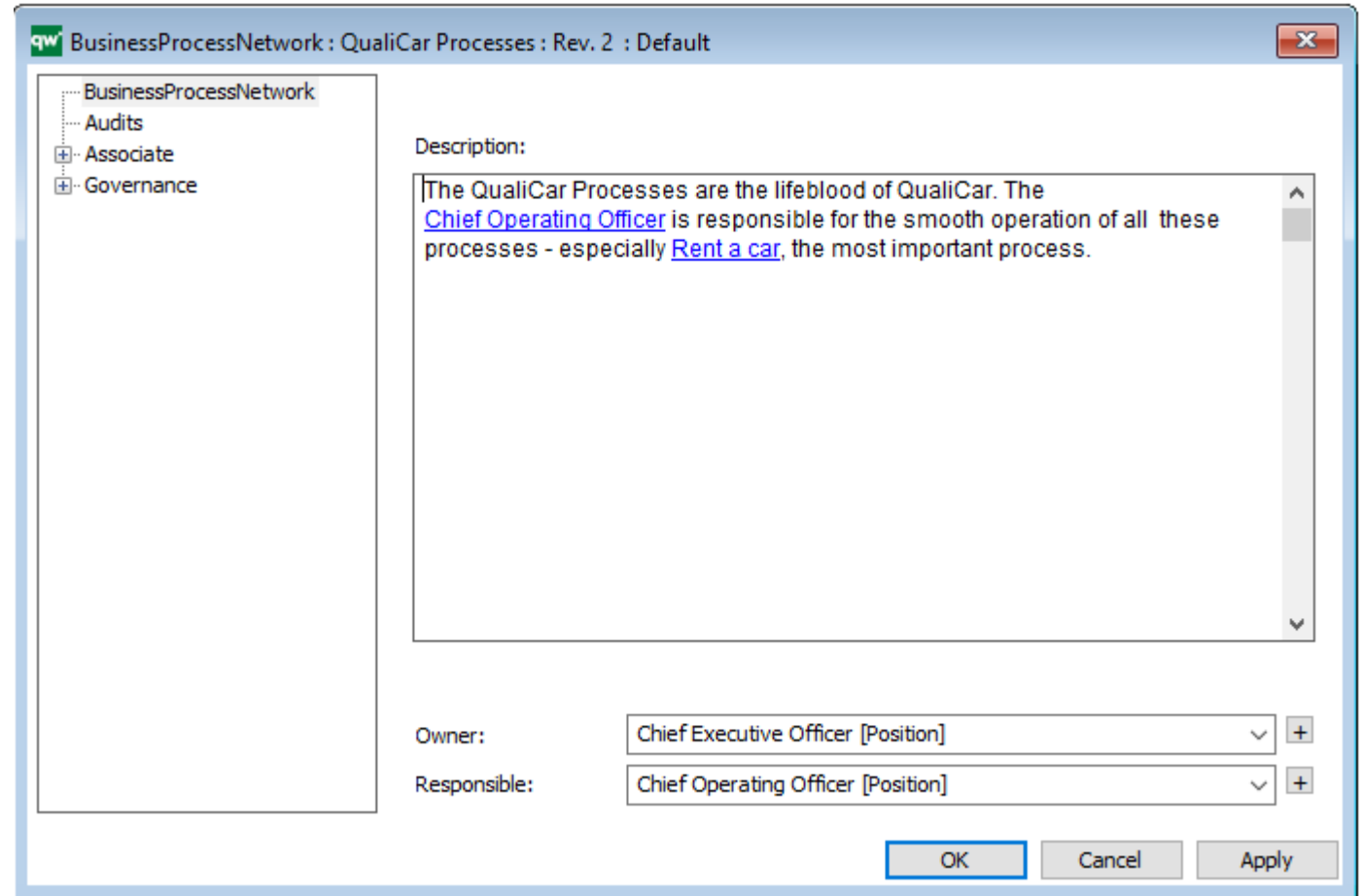


# BusinessProcessNetwork

BusinessProcessNetwork



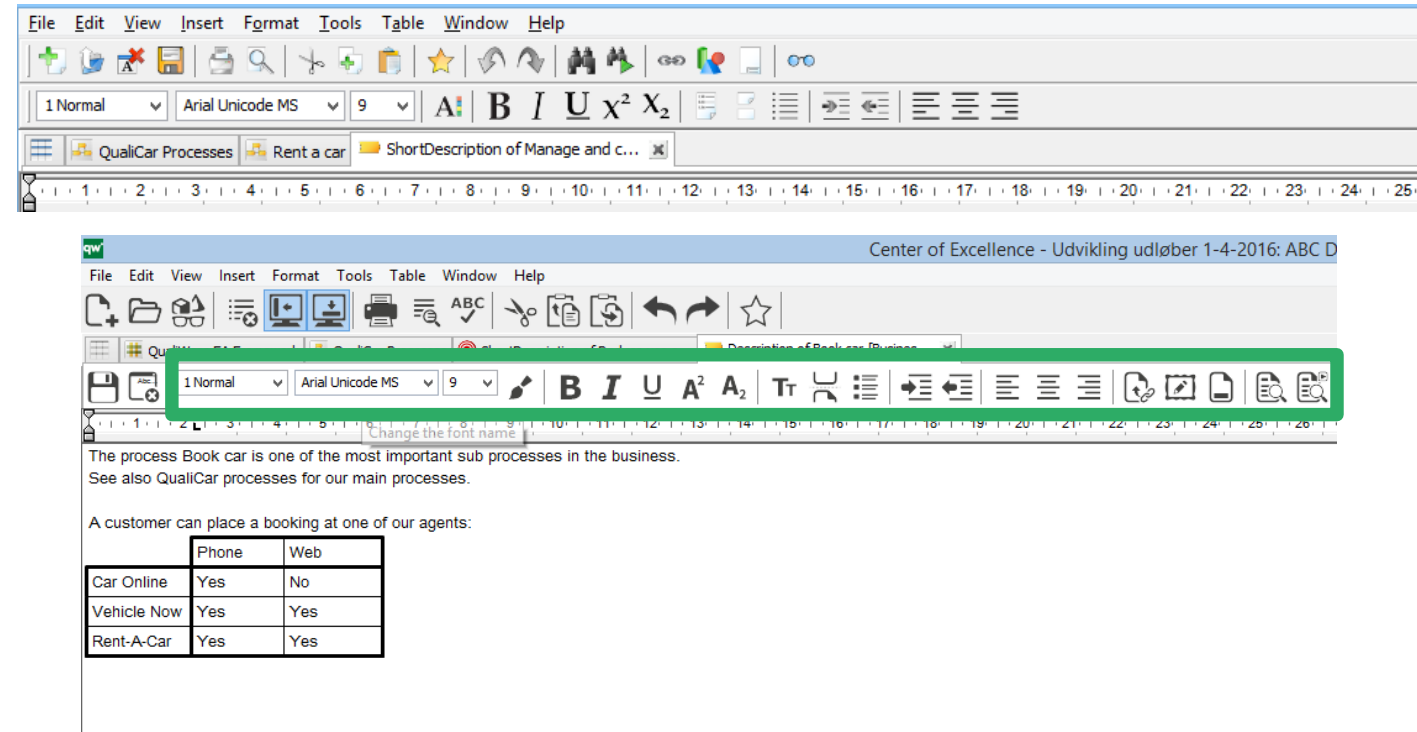
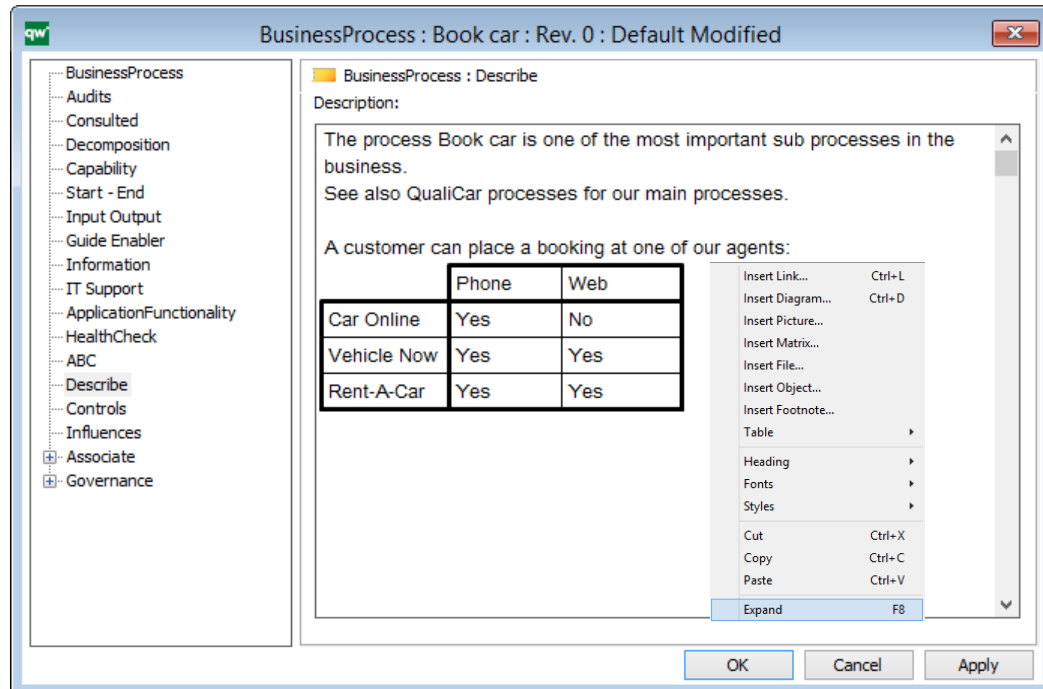
The screenshot shows the BusinessProcessNetwork interface. On the left, a context menu is open with the following items: Open..., View..., Governance..., Actions >, Revisions >, Language >, Explore, Context >, Relations >, Find..., Delete, Rename, Appearance >, and Help (F1). In the center, a tree view shows a folder named 'QualiCar Processes' expanded, containing sub-items like Governance, Purchasing, Marketing, Rent a car, Performance, Bill of Materials, Management, Provisioning, Customer, and Chief. Below the tree, another context menu is open for the 'QualiCar Processes' folder, with 'Properties...' highlighted. This menu includes: Open..., Describe..., View..., Explore..., Governance..., Revisions >, Language >, Relations >, Find..., Cut, Copy, Paste, Delete, Rename, Help (F1), and Properties... (highlighted).




The screenshot shows the 'BusinessProcessNetwork : QualiCar Processes : Rev. 2 : Default' dialog box. On the left, a tree view shows the structure: BusinessProcessNetwork, Audits, Associate, and Governance. The 'Description' field contains the text: 'The QualiCar Processes are the lifeblood of QualiCar. The [Chief Operating Officer](#) is responsible for the smooth operation of all these processes - especially [Rent a car](#), the most important process.' Below the description, the 'Owner' is set to 'Chief Executive Officer [Position]' and the 'Responsible' is set to 'Chief Operating Officer [Position]'. At the bottom, there are 'OK', 'Cancel', and 'Apply' buttons.

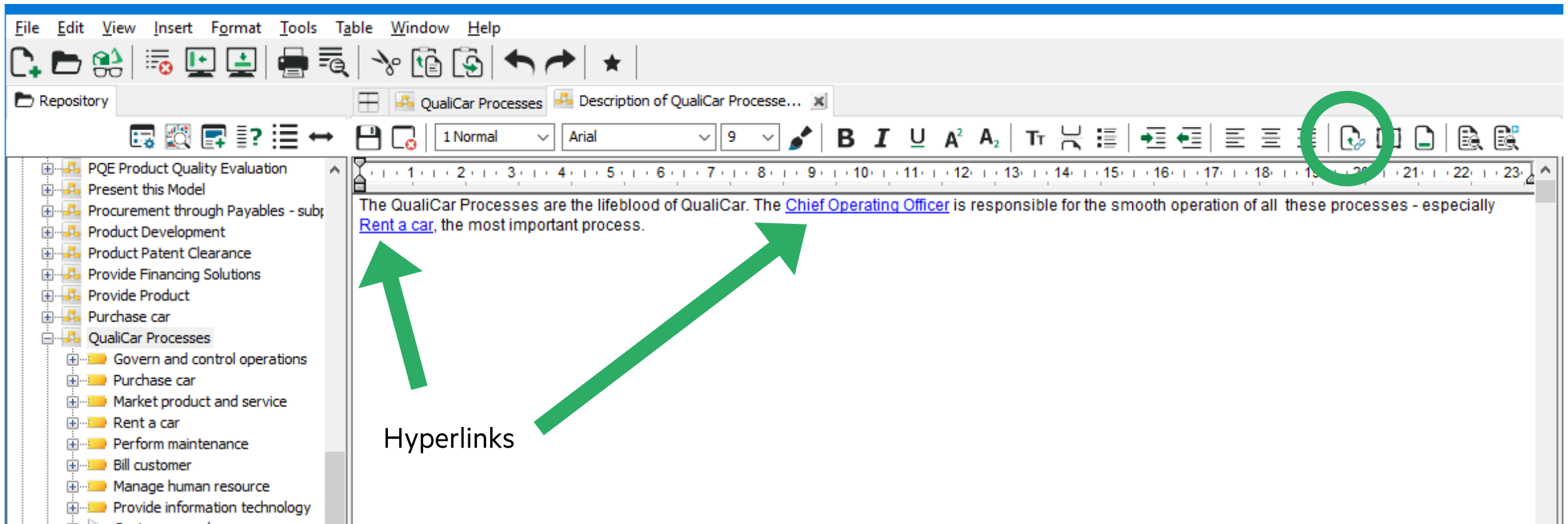
# Expanded text editor

To expand a text field: Press F8 or right click and select Expand



# Hyperlinks in text fields

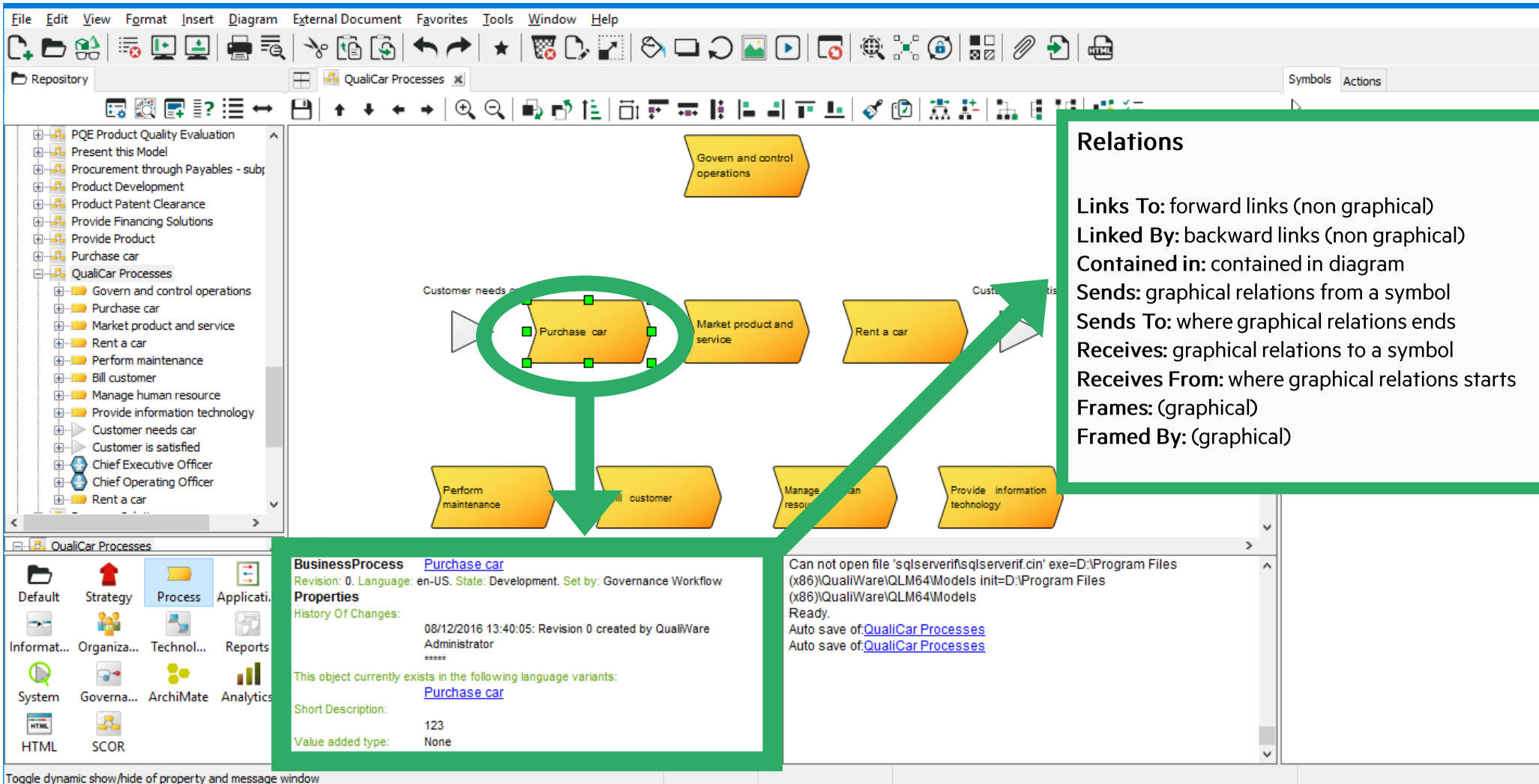
To create a hyperlink to an object;  
use the button **Insert a hyperlink**   
or press **Ctrl L**  
or right click and select **Insert link**



The screenshot shows the Qualiware software interface. The main window displays a text field with the following content: "The QualiCar Processes are the lifeblood of QualiCar. The [Chief Operating Officer](#) is responsible for the smooth operation of all these processes - especially [Rent a car](#), the most important process." The text "Chief Operating Officer" and "Rent a car" are underlined and blue, indicating they are hyperlinks. The software interface includes a menu bar (File, Edit, View, Insert, Format, Tools, Table, Window, Help), a toolbar with various icons, and a left-hand navigation pane showing a tree structure of process categories. A green circle highlights the "Insert a hyperlink" icon in the toolbar. Two green arrows point from the text "Hyperlinks" at the bottom left to the two hyperlinks in the text field.

# Property window

Click on the symbol to show the properties for the object and relations to other objects in the 'property window'



The screenshot displays the QualiWare interface. On the left is a tree view of the 'QualiCar Processes' repository. The main area shows a process diagram with several activity nodes. The 'Purchase car' node is highlighted with a green circle. A green arrow points from this node to the 'Property window' at the bottom. Another green arrow points from the 'Relations' box to the 'Purchase car' node. The 'Property window' shows details for the 'Purchase car' business process, including its revision, language, state, and history of changes. The 'Relations' box lists various relationship types such as 'Links To', 'Linked By', 'Contained in', 'Sends', 'Sends To', 'Receives', 'Receives From', 'Frames', and 'Framed By'.

**Relations**

- Links To: forward links (non graphical)
- Linked By: backward links (non graphical)
- Contained in: contained in diagram
- Sends: graphical relations from a symbol
- Sends To: where graphical relations ends
- Receives: graphical relations to a symbol
- Receives From: where graphical relations starts
- Frames: (graphical)
- Framed By: (graphical)

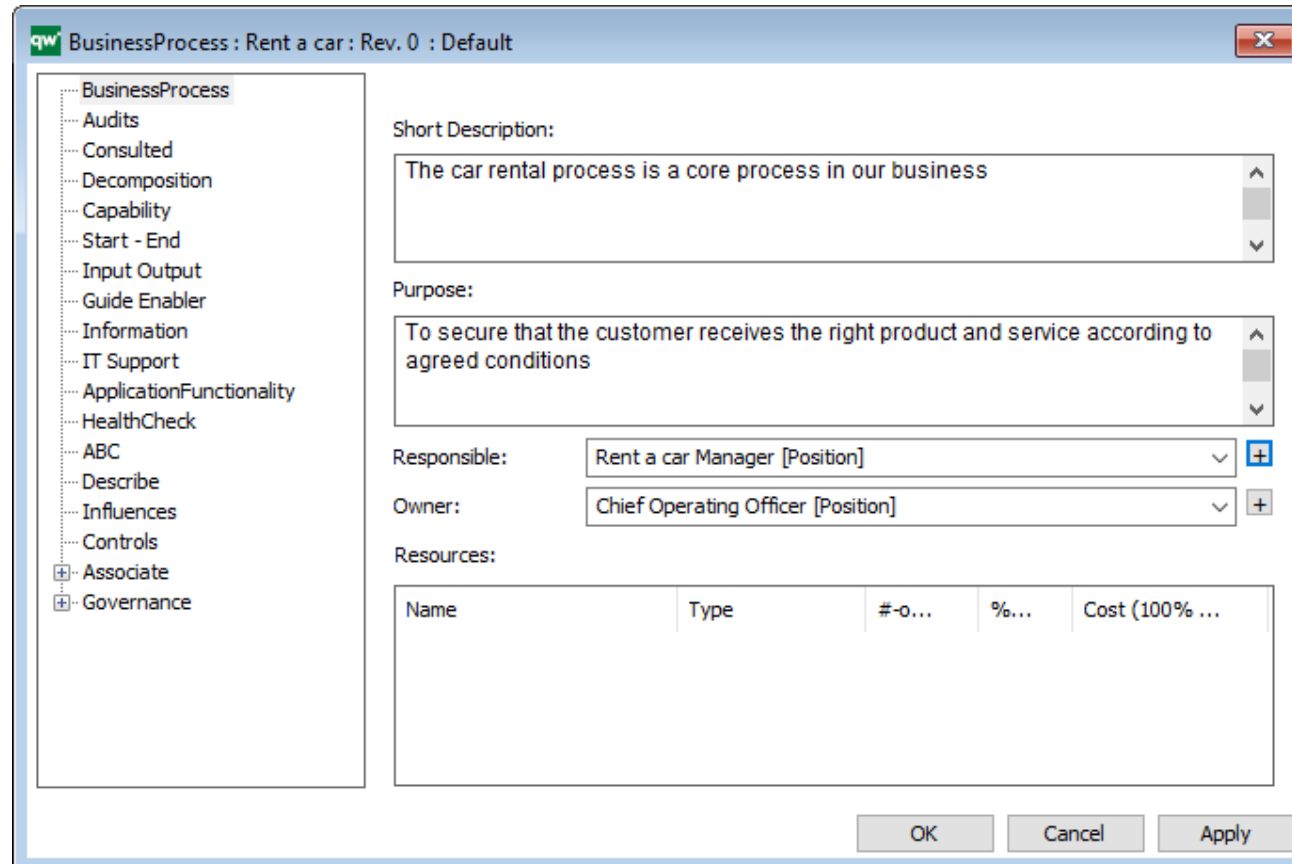
**BusinessProcess** [Purchase car](#)  
Revision: 0, Language: en-US, State: Development, Set by: Governance Workflow  
**Properties**  
History Of Changes:  
08/12/2016 13:40:05: Revision 0 created by QualiWare Administrator \*\*\*\*\*  
This object currently exists in the following language variants:  
[Purchase car](#)  
Short Description: 123  
Value added type: None



# Demo – Describe a process

# Lesson 3 – Describe symbols and diagrams

**Purpose:** Learn how to describe the properties of an object by adding text, create relations (links) to other objects.



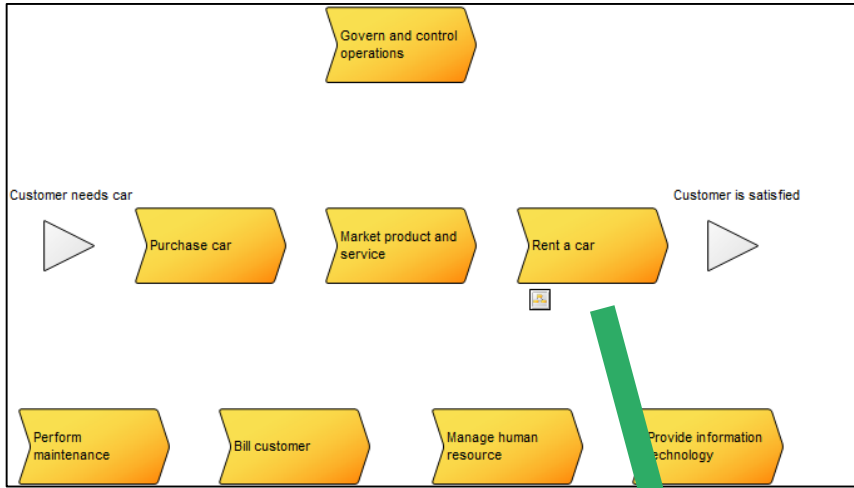
The screenshot shows a software window titled "BusinessProcess : Rent a car : Rev. 0 : Default". On the left is a tree view with categories like BusinessProcess, Audits, Consulted, Decomposition, Capability, Start - End, Input Output, Guide Enabler, Information, IT Support, ApplicationFunctionality, HealthCheck, ABC, Describe, Influences, Controls, Associate, and Governance. The main area contains several fields: "Short Description" with the text "The car rental process is a core process in our business"; "Purpose" with the text "To secure that the customer receives the right product and service according to agreed conditions"; "Responsible:" with a dropdown menu set to "Rent a car Manager [Position]"; and "Owner:" with a dropdown menu set to "Chief Operating Officer [Position]". Below these is a "Resources:" section with a table header: "Name", "Type", "#-o...", "%...", and "Cost (100% ...)". The table is currently empty. At the bottom are "OK", "Cancel", and "Apply" buttons.

Name	Type	#-o...	%...	Cost (100% ...
------	------	--------	------	----------------

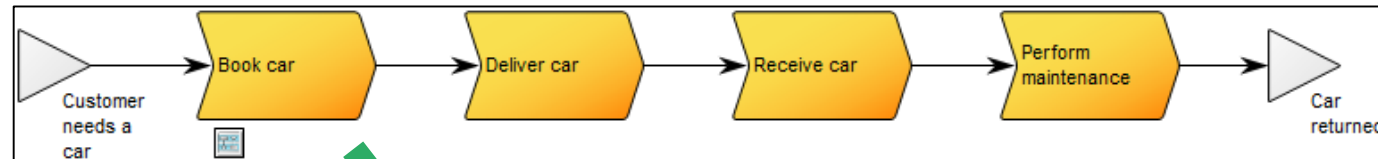
# Create Decomposition



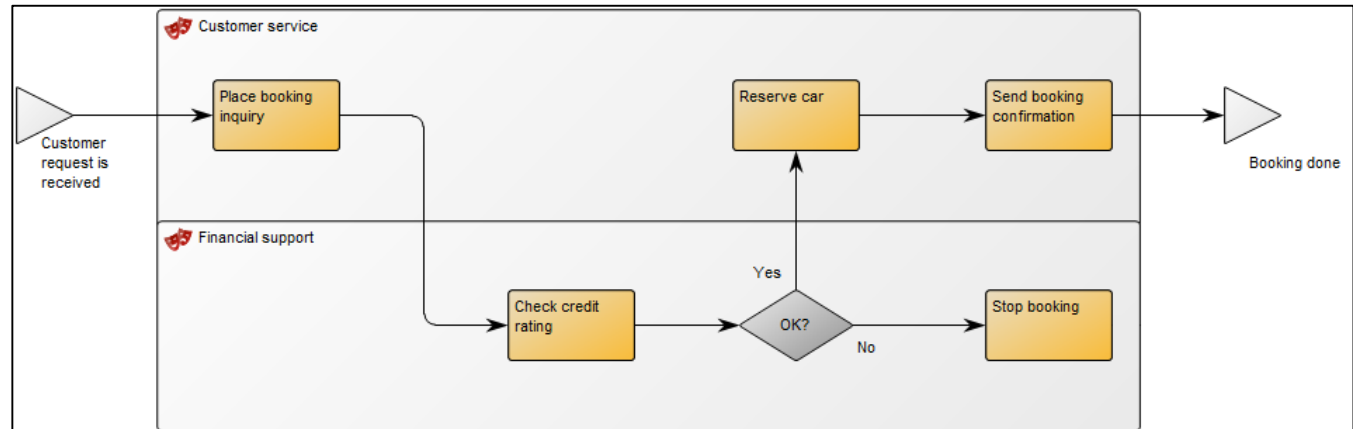
# Zoom-in processes



Main processes break down to sub processes... (Breaks down to)



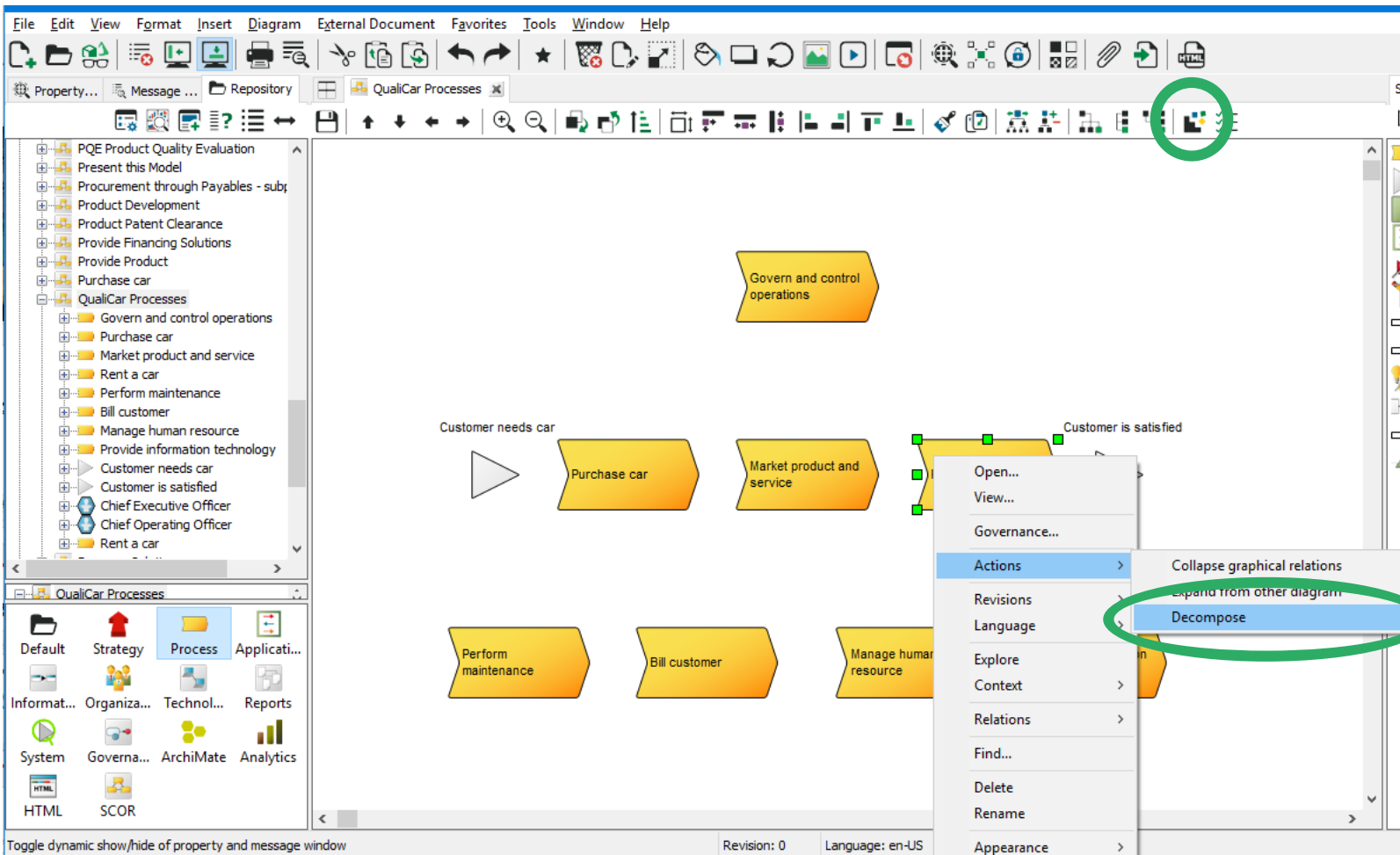
...and are visualized by workflow diagram (Visualized by work flow diagram)



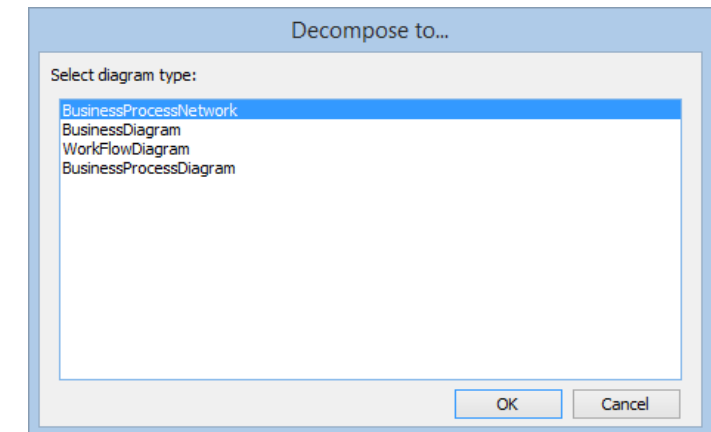


# Decompose a process

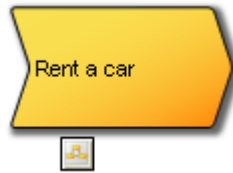
Select an object, right click and select **Actions/Decompose** or use the **Decompose** button in the tool bar to break down a process into a new diagram



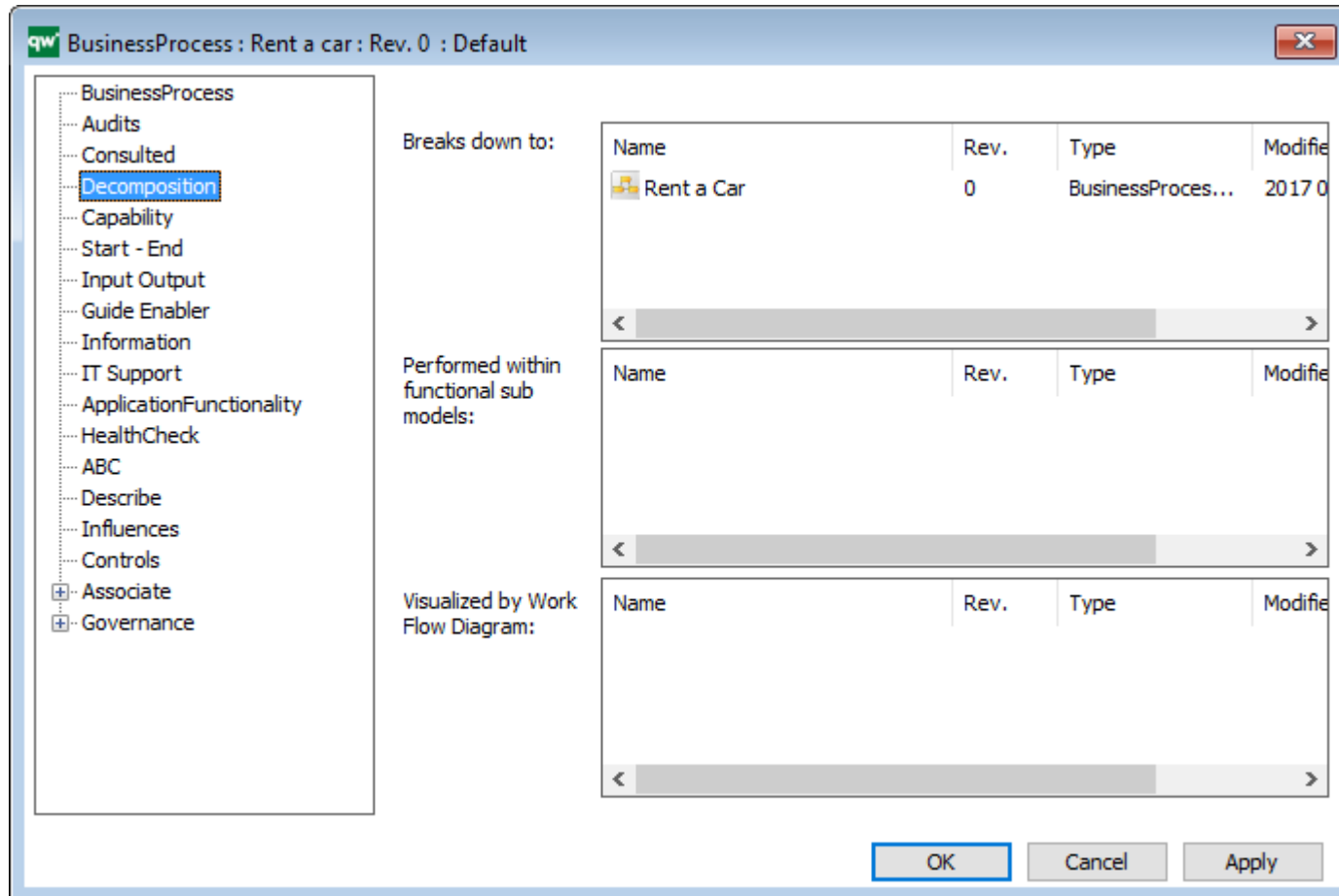
Select type of diagram for decomposing



# Drill down processes



BusinessProcess – tab 'Decomposition'




BusinessProcess : Rent a car : Rev. 0 : Default

BusinessProcess

- Audits
- Consulted
- Decomposition**
- Capability
- Start - End
- Input Output
- Guide Enabler
- Information
- IT Support
- ApplicationFunctionality
- HealthCheck
- ABC
- Describe
- Influences
- Controls
- Associate
- Governance

Breaks down to:

Name	Rev.	Type	Modifie
 Rent a Car	0	BusinessProces...	2017 0

Performed within functional sub models:

Name	Rev.	Type	Modifie
------	------	------	---------

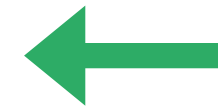
Visualized by Work Flow Diagram:

Name	Rev.	Type	Modifie
------	------	------	---------

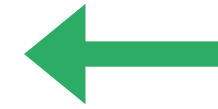
OK Cancel Apply



Breaks down to sub processes



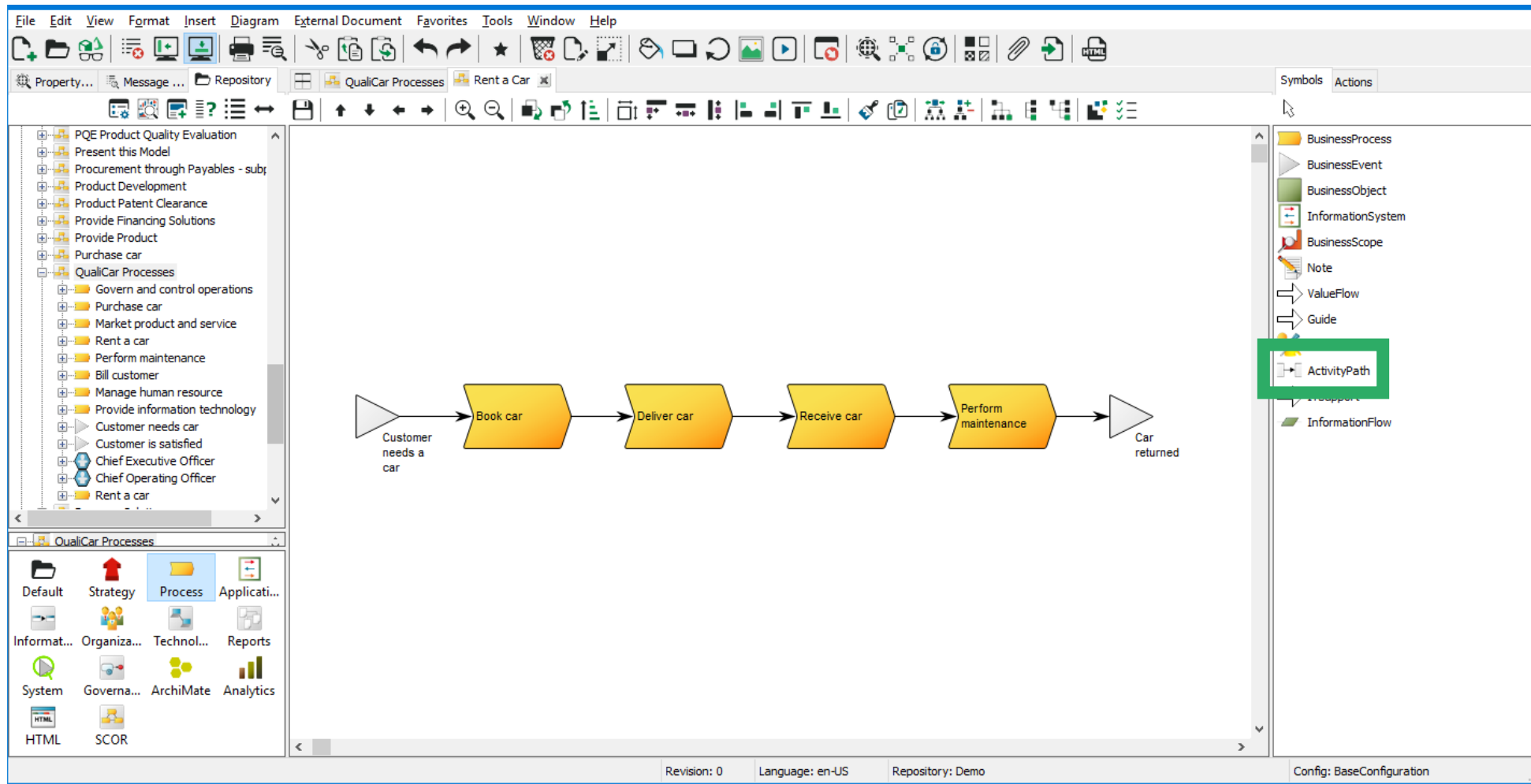
Breaks down to a functional model



Visualized by workflow

# Draw relations

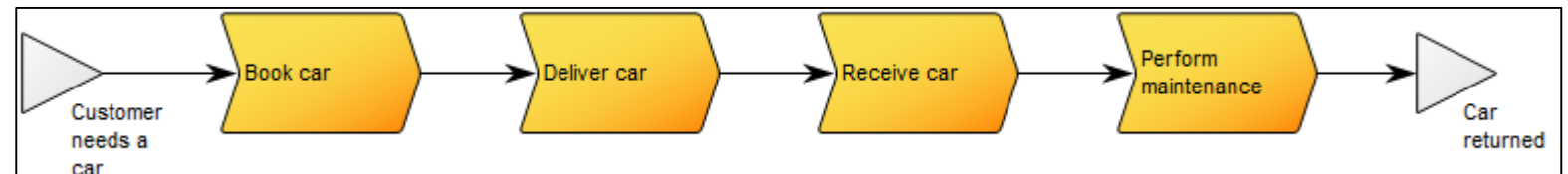
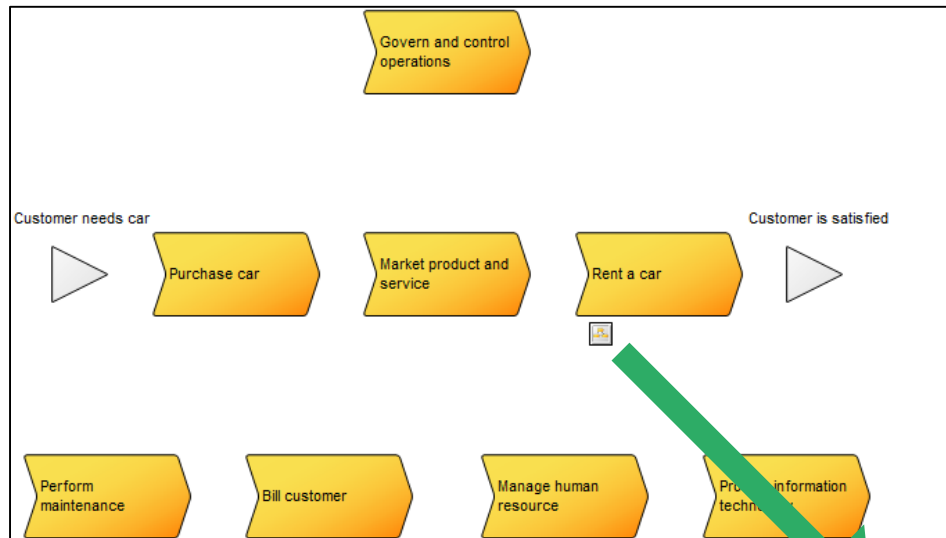
- Select a connector (ActivityPath)
- Click on the "from" symbol and then click on the "to" symbol



# Demo – Create a decomposition

# Exercise 3 – Create process hierarchy

**Purpose:** Learn how to create diagram hierarchies and relations between diagrams. We will also learn more about editing a diagram.

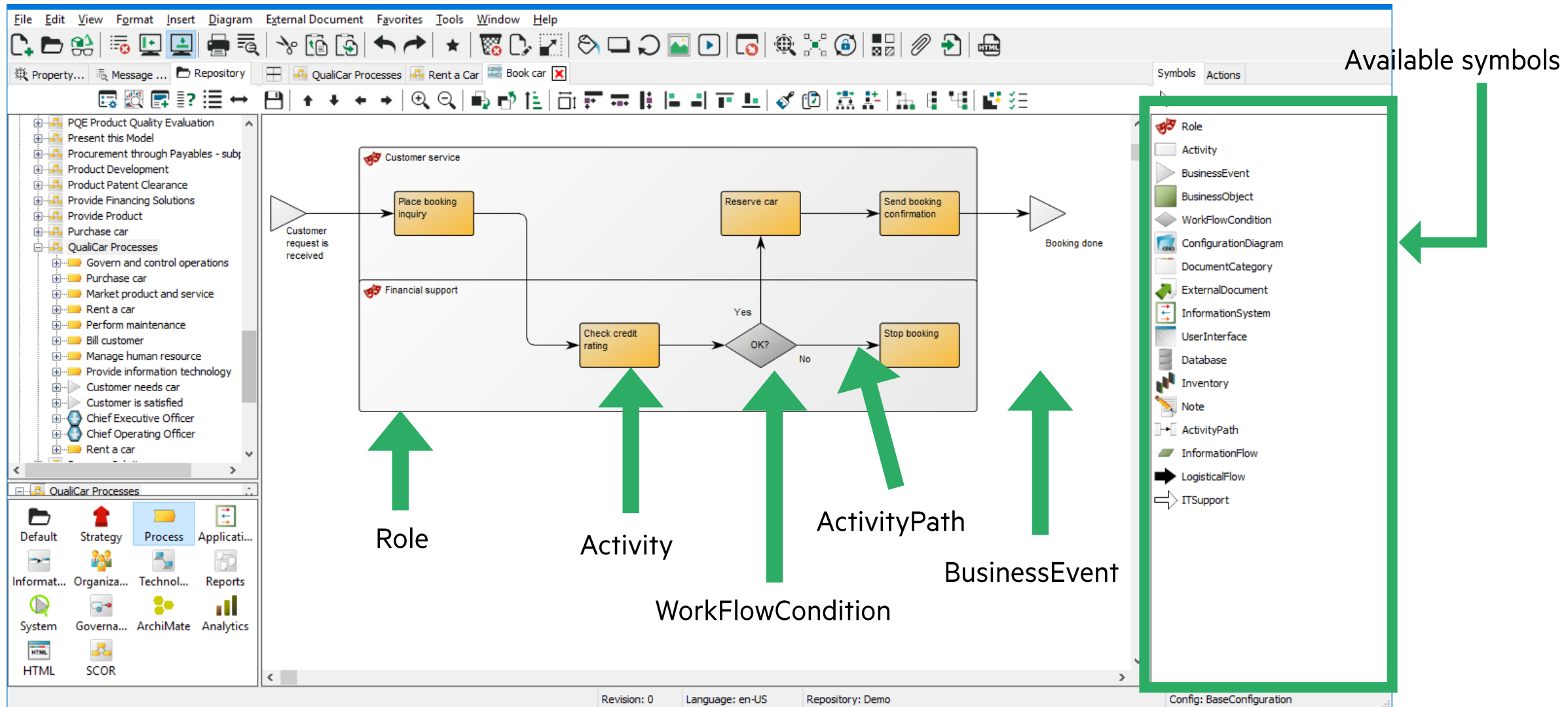




# Workflows

# Workflow

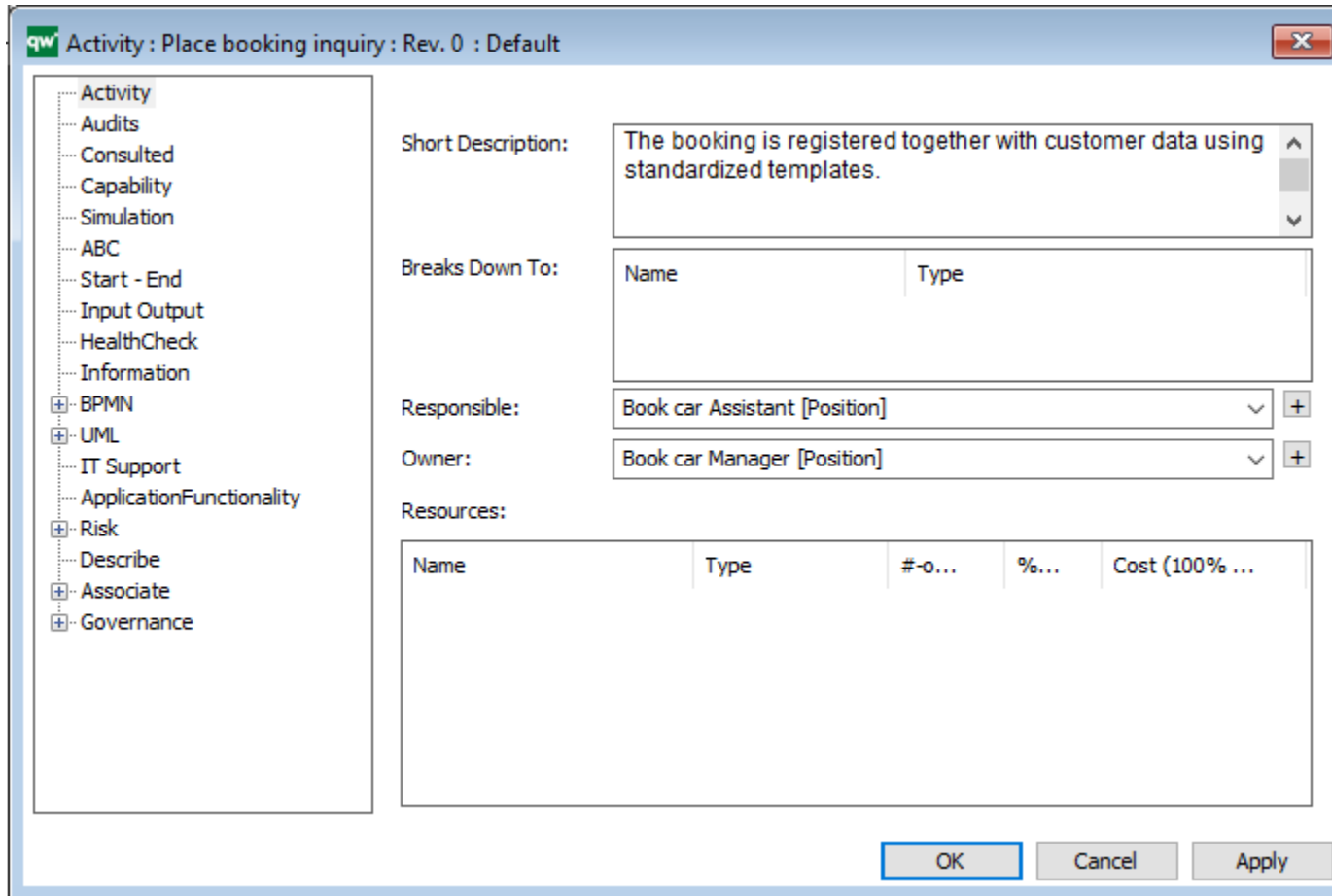
The diagram WorkFlowDiagram is used for describing activities



# Activity

Place booking inquiry

## Properties for Activity



Activity : Place booking inquiry : Rev. 0 : Default

Activity

- Audits
- Consulted
- Capability
- Simulation
- ABC
- Start - End
- Input Output
- HealthCheck
- Information
- + BPMN
- + UML
- IT Support
- ApplicationFunctionality
- + Risk
- Describe
- + Associate
- + Governance

Short Description: The booking is registered together with customer data using standardized templates.

Breaks Down To:

Name	Type
------	------

Responsible: Book car Assistant [Position] +

Owner: Book car Manager [Position] +

Resources:

Name	Type	#-0...	%...	Cost (100% ...
------	------	--------	------	----------------

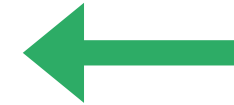
OK Cancel Apply



Short description



Breaks down to Links to WorkflowDiagram, BusinessProcessDiagram etc.



Responsible Owner



Resources Links to Person, Position etc.



# Role



## Properties for Role

Role : Customer service : Rev. 0 : Default

Role  
Audits  
Describe  
Associate  
Governance  
Minimum Comp.

Short Description:  
The Customer Service role performs interactions with the customer.

Actors:

Name	Rev.	Type	Show
Book car Assistant	0	Position	<input type="checkbox"/>
Book car Manager	0	Position	<input type="checkbox"/>

Substitute:

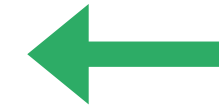
Name	Rev.	Type	Modified
------	------	------	----------

Breaks down to:

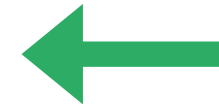
Name	Rev.	Type	Modified
------	------	------	----------

Super-role:

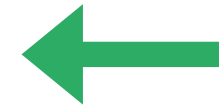
OK Cancel Apply



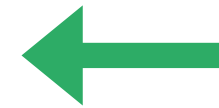
Short description



Actors  
Link to Position,  
OrganizationUnit etc.



Substitute e.g. IT-system



Sub roles



Super role

# WorkFlowDiagram

qw WorkFlowDiagram : Book car : Rev. 0 : Default

- WorkflowDiagram
  - Audits
  - Describe
  - Associate
  - Governance

Total cost:  Cost unit:

Total Duration:  Time unit: Day

Standard deviation:

Owner: Rent a car Manager [Position]

Responsible: Book car Manager [Position]

Name	Rev.	Type
------	------	------

Model type: As-Is

OK Cancel Apply

← Workflow information

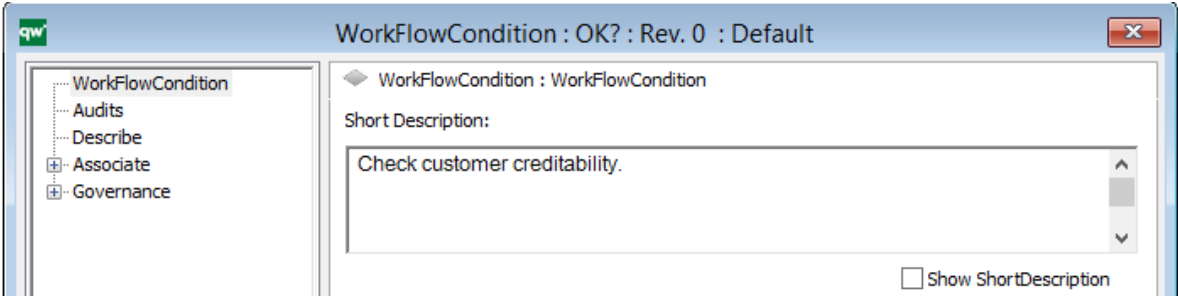
← Responsible Owner

← Technical Field

← As-is or To-be architecture

# Condition

## Properties for WorkFlowCondition



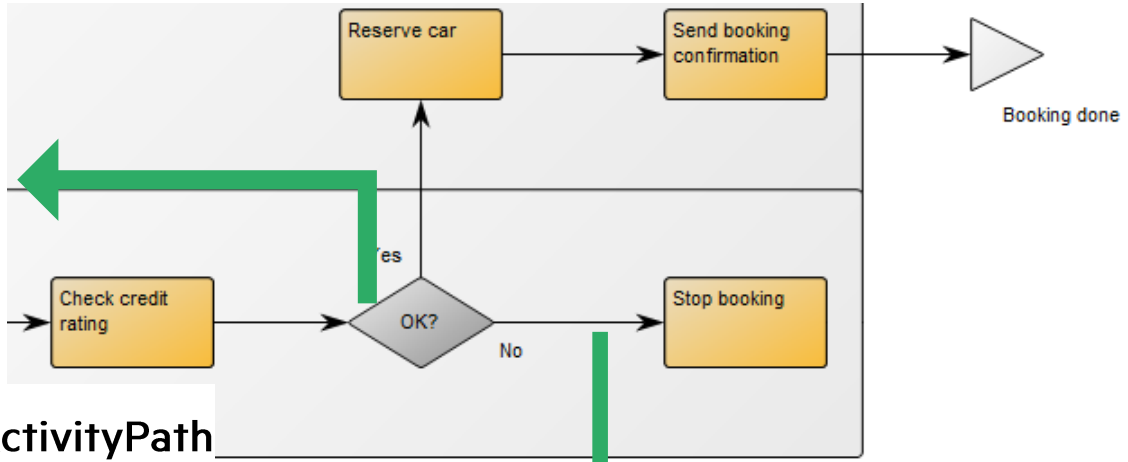
WorkFlowCondition : OK? : Rev. 0 : Default

WorkFlowCondition : WorkFlowCondition

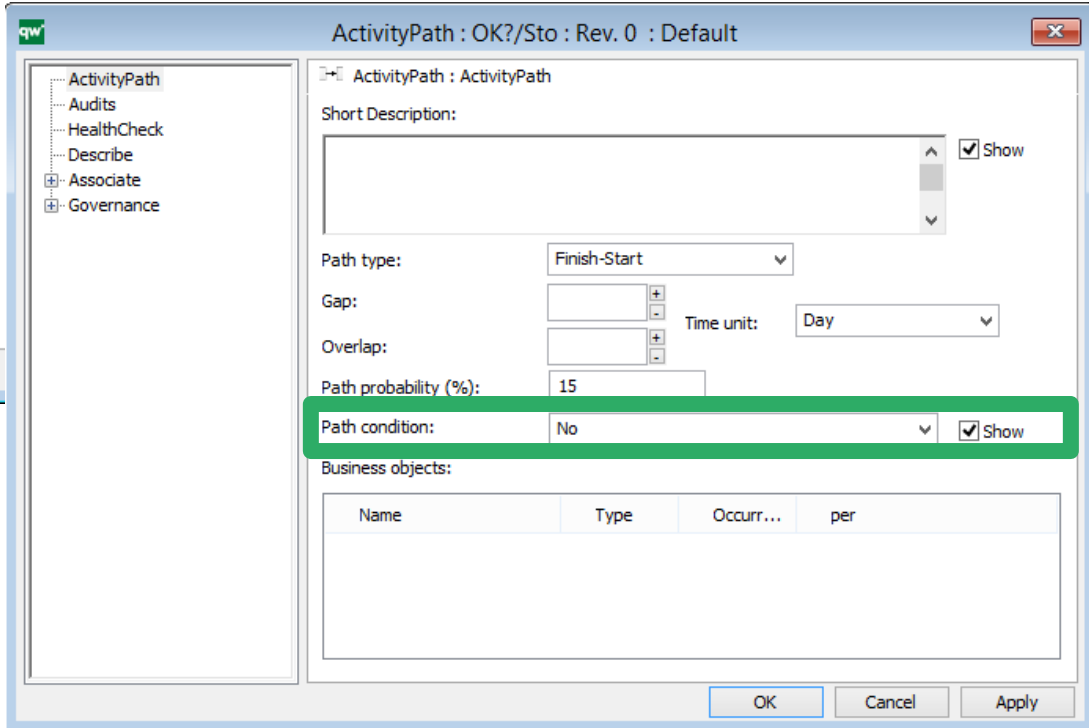
Short Description:

Check customer creditability.

Show ShortDescription



## Properties for ActivityPath



ActivityPath : OK?/Sto : Rev. 0 : Default

ActivityPath : ActivityPath

Short Description:

Show

Path type: Finish-Start

Gap:    Time unit: Day

Overlap:

Path probability (%): 15

Path condition: No  Show

Business objects:

Name	Type	Occurr...	per
------	------	-----------	-----

OK Cancel Apply

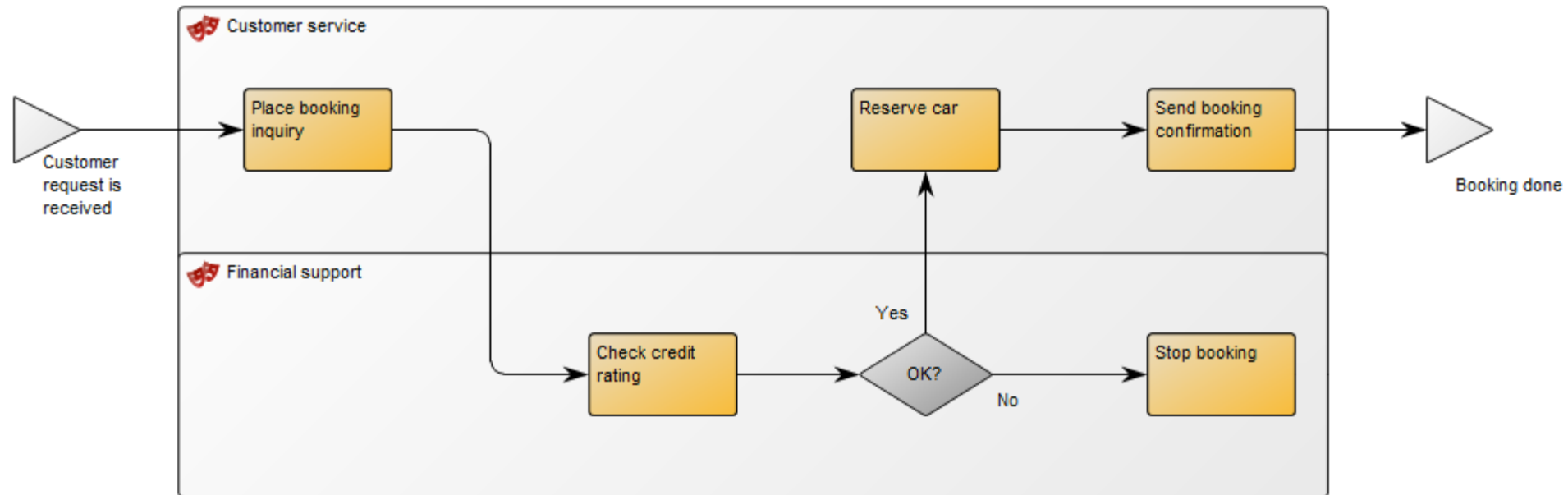




# Demo - Workflows

# Exercise 5 – Workflows

**Purpose:** To learn how to draw workflows and describe activities, responsible and resources.

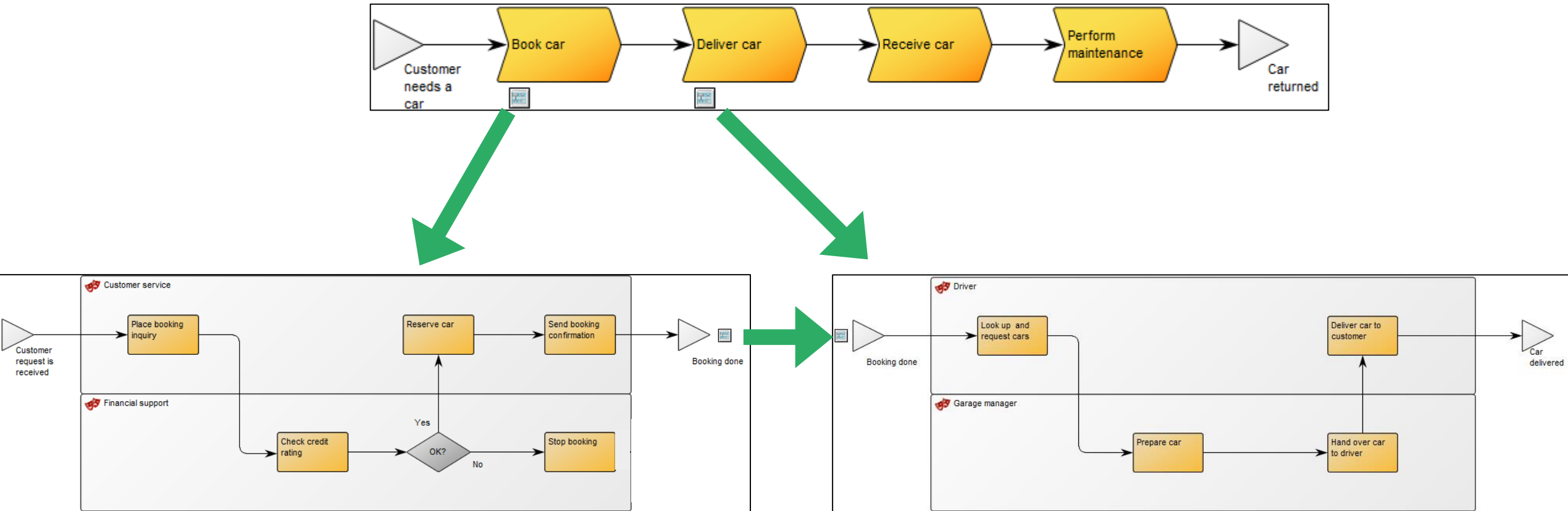




# Linking across diagrams

# Linking via BusinessEvents

- Re-use BusinessEvent





# Demo - Linking across diagrams

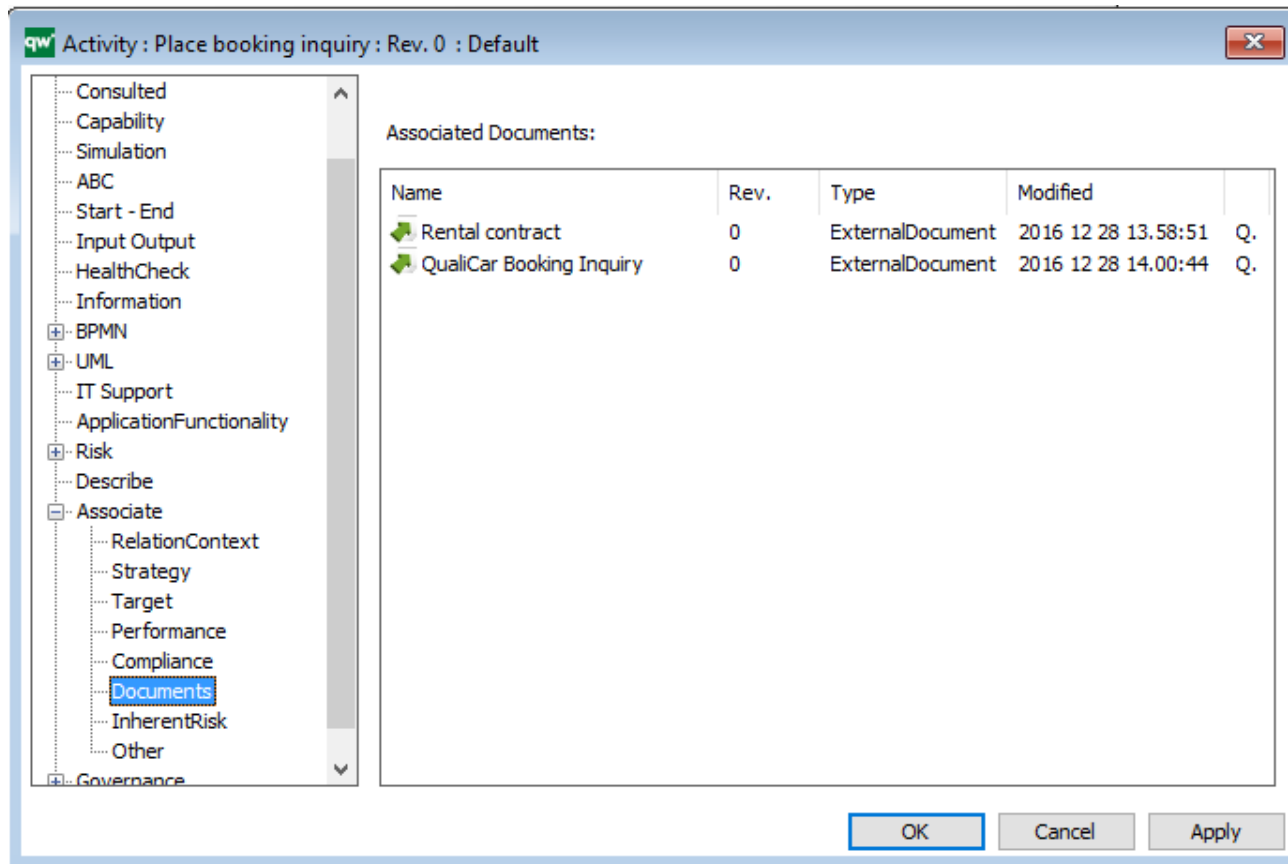




# External documents and web navigation

# References to documents

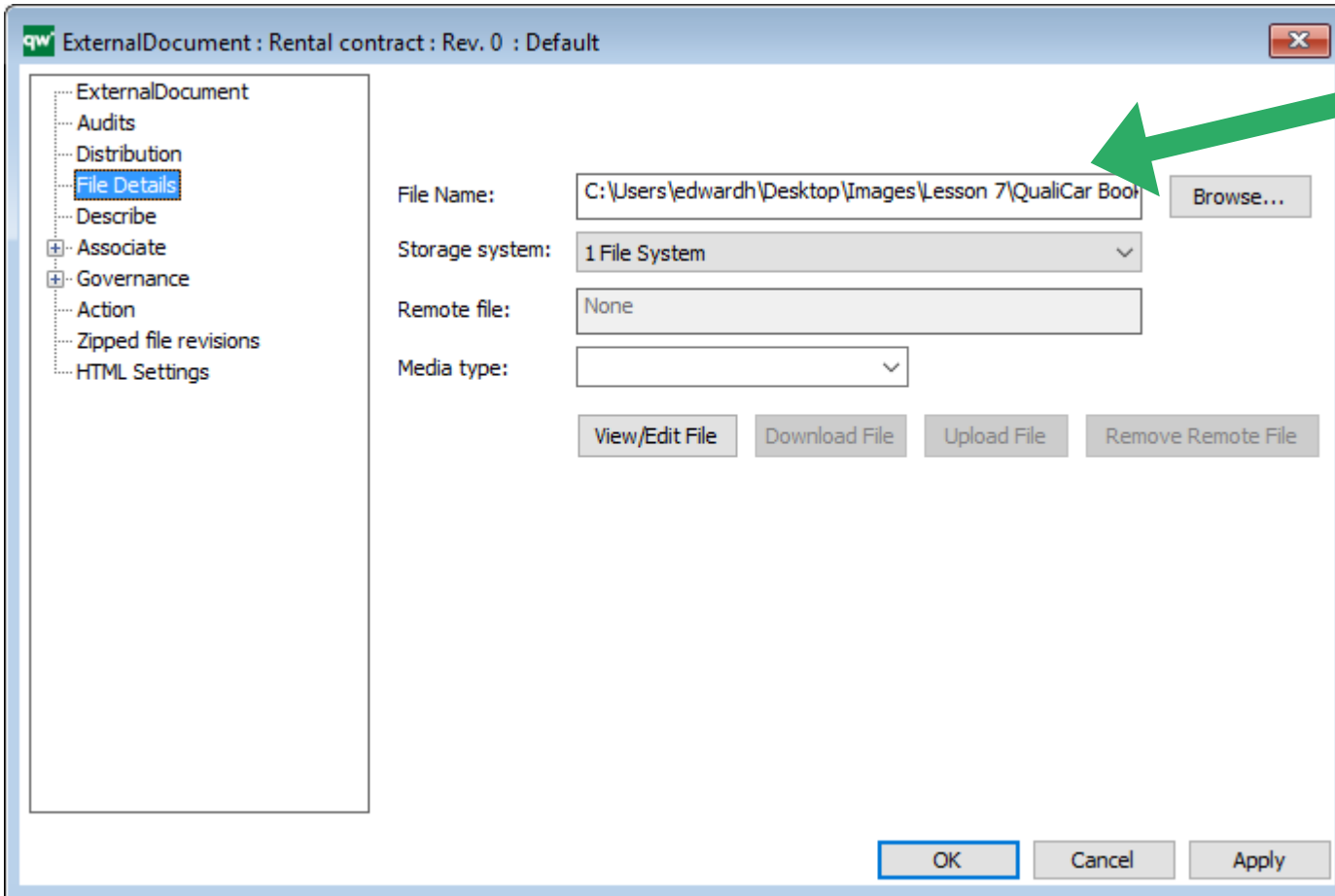
- The field **Associated with** is used to link to documents (**ExternalDocument**) which are stored outside the repository.
- **ExternalDocument** can also be visualized in the diagram.



You can link to a Word-document, Excel spread sheet, pdf-file, URL etc.

# References to documents

## Properties for ExternalDocument



ExternalDocument : Rental contract : Rev. 0 : Default

- ExternalDocument
- Audits
- Distribution
- File Details
- Describe
- Associate
- Governance
- Action
- Zipped file revisions
- HTML Settings

File Name: C:\Users\edwardh\Desktop\Images\Lesson 7\QualiCar Boo Browse...

Storage system: 1 File System

Remote file: None

Media type:

View/Edit File Download File Upload File Remove Remote File

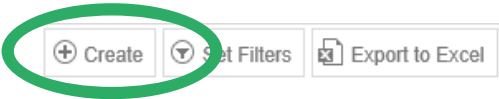
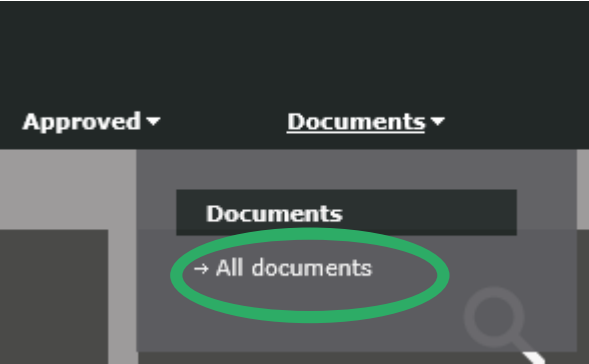
OK Cancel Apply

Path to the document

Use **Browse** button to find the document

Use **View/Edit file** button to open the document

# External documents on the web



QualiCar Rental Contract

Name: QualiCar Rental Contract

Short Description:

Paragraph St... **B** *I* U **A** [List icons] [Zoom icons]

Document number: [ ] Version: [ ]

Archive: [ ]

Document type: Controlled [v]

Revision date: [ ] [Calendar] [Refresh]

Next revision: [ ] [Calendar] [Refresh]

Responsible: [v]

Owner: [v]

Keywords: Paragraph St... **B** *I* U **A** [List icons] [Zoom icons]

FileDetails

File Name: [ ]

Storage system: 1 File System [v]

Remote file: [ ]

Media type: Document [v]

File: [QualiCar Rental Contract.pdf](#) [Trash icon] (circled in green)

OK Cancel Apply



# Demo – External documents

# Exercise 7 – External documents

**Purpose:** Understand how to create and link to external documents in QLM and on the Web.

QualiCar Rental Contract

Name: QualiCar Rental Contract

Short Description:

Paragraph St... **B** *I* U **A** [List icons] [Print icon] [Close icon]

Document number: [ ] Version: [ ]

Archive: [ ]

Document type: Controlled [v]

Revision date: [ ] [Calendar icon] [Refresh icon]

Next revision: [ ] [Calendar icon] [Refresh icon]

Responsible: [v]

Owner: [v]

Keywords: Paragraph St... **B** *I* U **A** [List icons] [Print icon] [Close icon]

FileDetails

File Name: [ ]

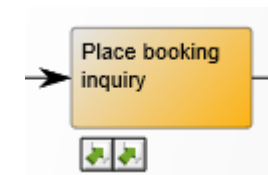
Storage system: 1 File System [v]

Remote file: [ ]

Media type: Document [v]

File: [QualiCar Rental Contract.pdf](#) [Icon]

OK Cancel Apply



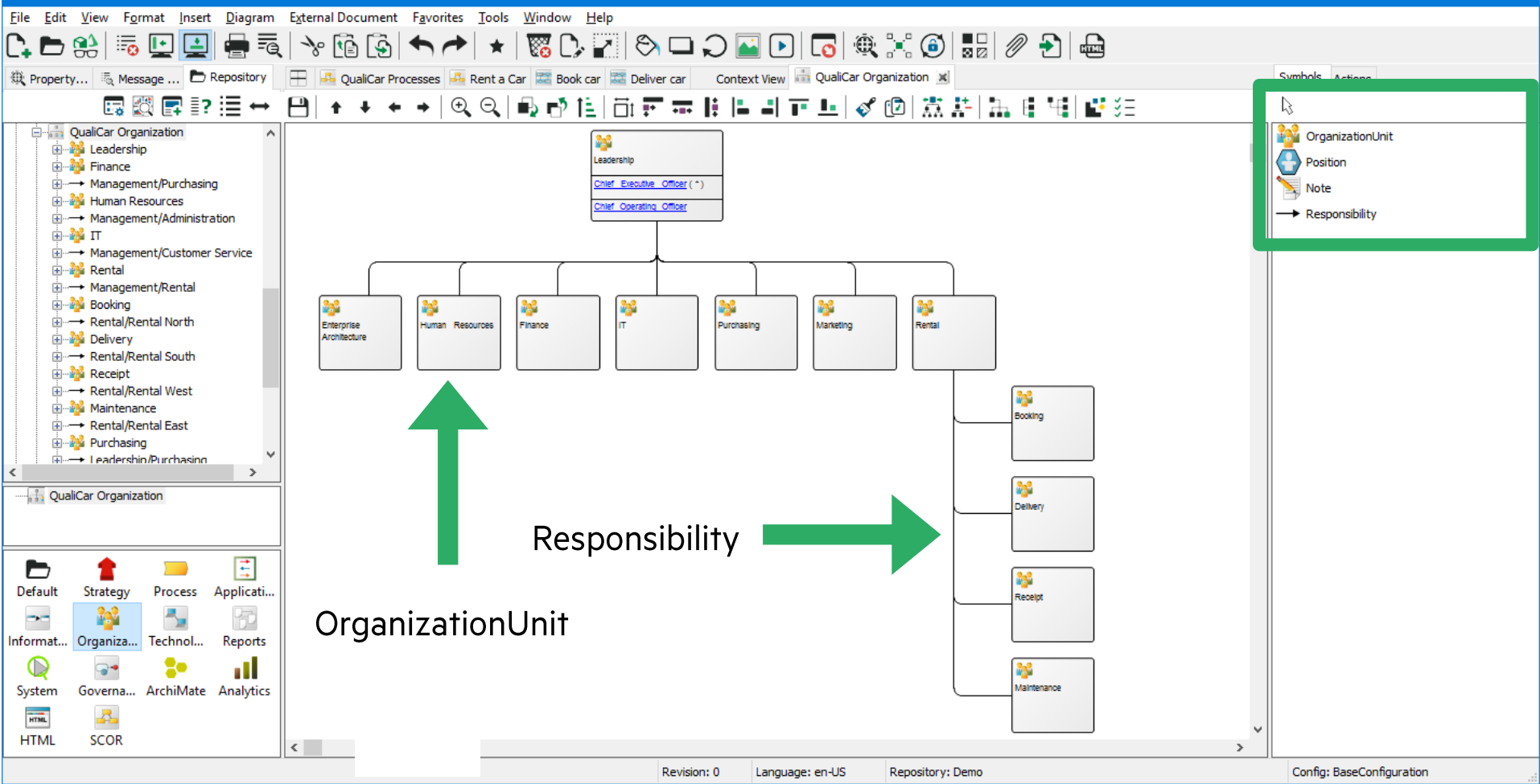


qualiware®  
Enabling positive change

# Organization

# Organization

The diagram OrganizationDiagram is used for describing organizational structures



Available symbols



# OrganizationUnit

Leadership

- [Chief Executive Officer \(\\*\)](#)
- [Chief Operating Officer](#)

## Properties for OrganizationUnit

OrganizationUnit : Leadership : Rev. 0 : Default

OrganizationUnit

- Audits
- Address
- HealthCheck
- Describe
- Associate
- Governance

Short Description:  
Administrative unit that Governs and controls QualiCar

Responsible: Chief Executive Officer [Position]

Resources:

Name	Type
Chief Operating Officer	Position

FTE:

Staff

Breaks Down To:

Name	Type
------	------

Show on diagram: Name, Responsible, Resources

OK Cancel Apply

- ← Short description
- ← Responsible
- ← Resources
- ← Breaks down to

# Position



## Properties for Position


qw Position : Chief Executive Officer : Rev. 0 : Default

Position  
Minimum Comp.  
Minimum req.  
Authority  
Describe  
+ Associate  
+ Governance  
Audits

Short Description: Head of QualiCar.

Task: Responsible for the direction in QualiCar.

Position holders:

Name	Rev.	Type	M
 Cecil Grosscastle	0	Person	2

Goals:

Name	Rev.	Type	M
------	------	------	---

OK Cancel Apply



Short description



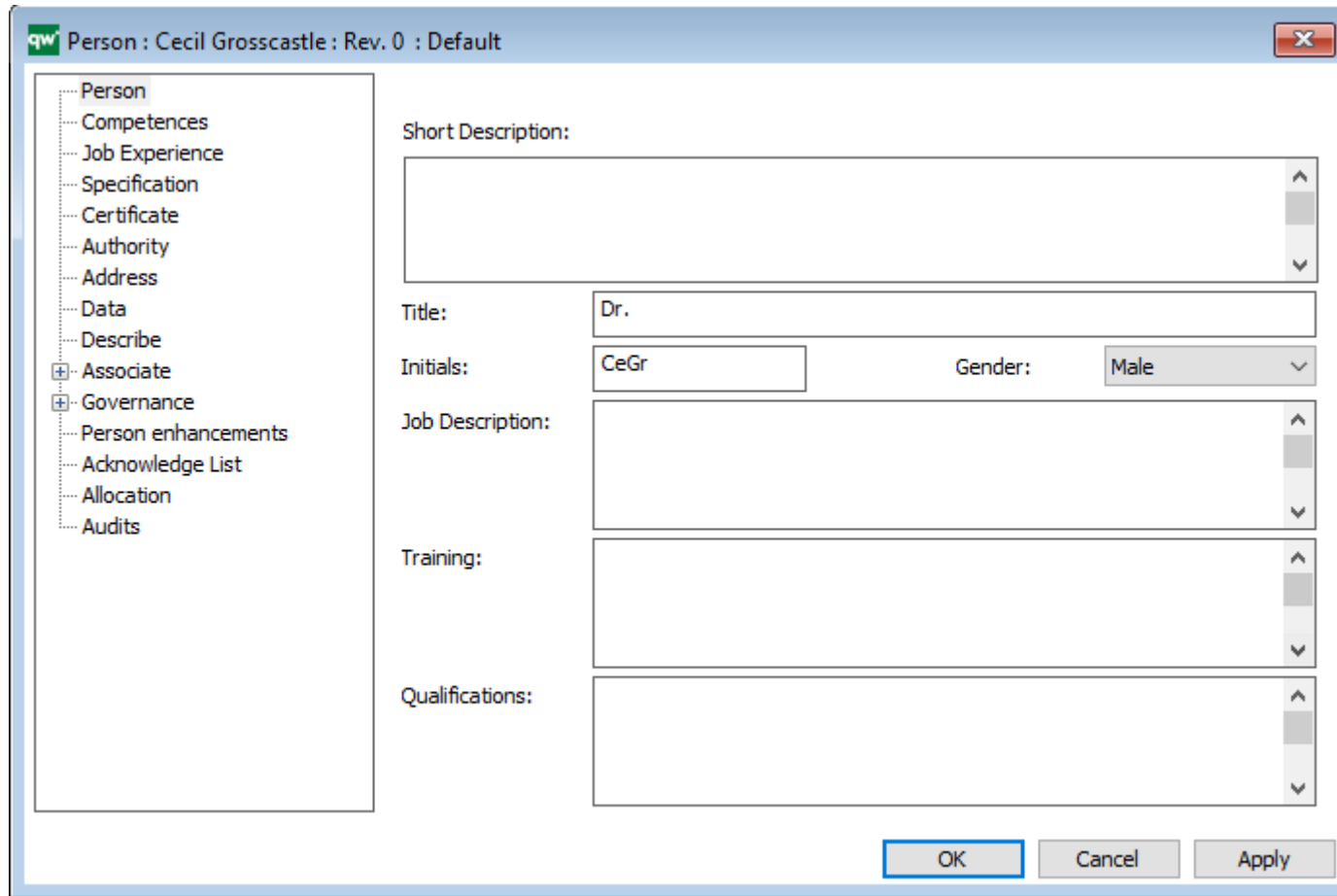
Task



Position holders  
Link to Person

# Person

## Properties for a Person



Person : Cecil Grosscastle : Rev. 0 : Default

- Person
- Competences
- Job Experience
- Specification
- Certificate
- Authority
- Address
- Data
- Describe
- Associate
- Governance
- Person enhancements
- Acknowledge List
- Allocation
- Audits

Short Description:

Title: Dr.

Initials: CeGr Gender: Male

Job Description:

Training:

Qualifications:

OK Cancel Apply



Short description



Title

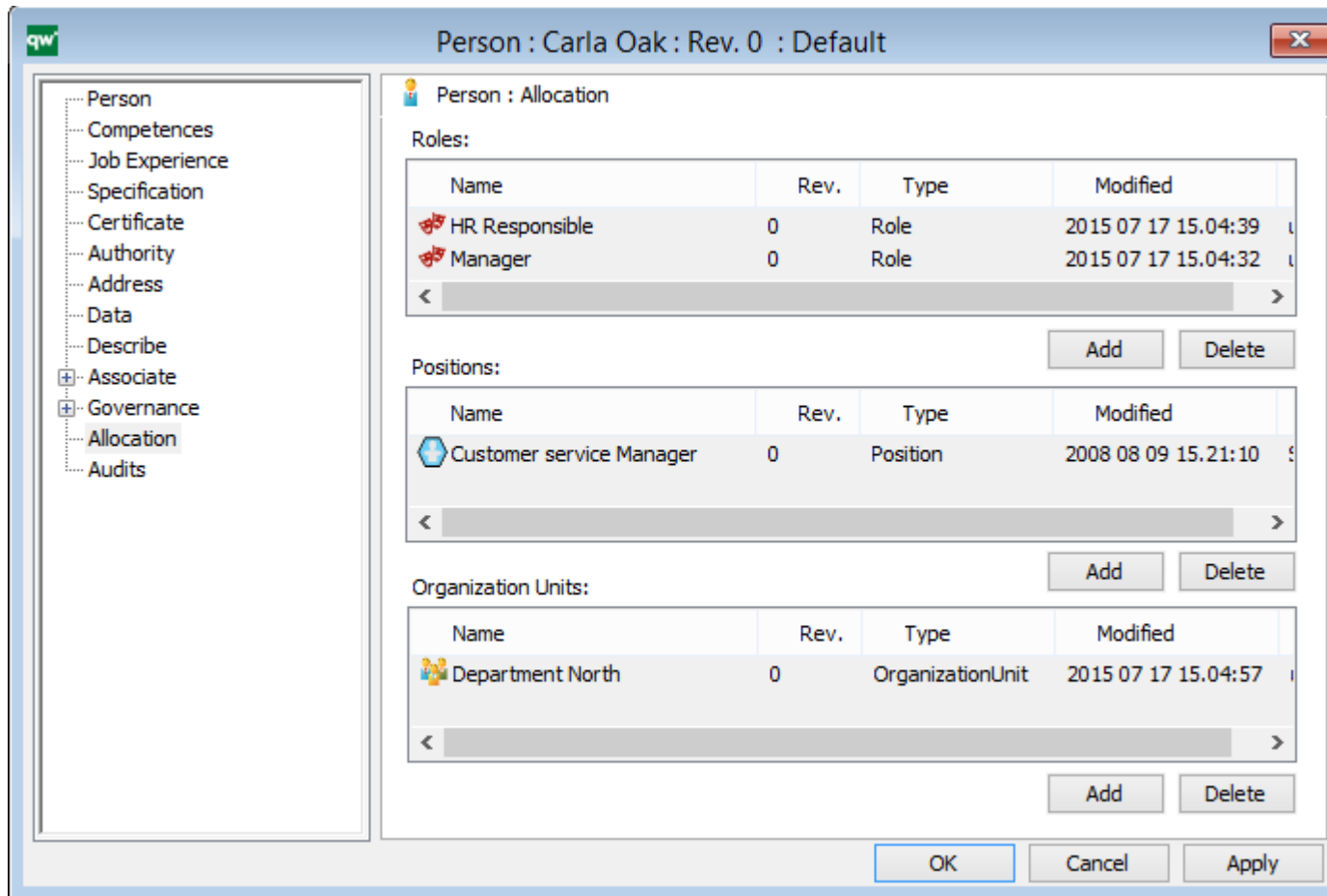
Gender

(will affect the symbol)



# Person

Roles, position and organizational belonging can be described for a person in the tab **Allocation**.



Person : Allocation

Roles:

Name	Rev.	Type	Modified
HR Responsible	0	Role	2015 07 17 15.04:39
Manager	0	Role	2015 07 17 15.04:32

Positions:

Name	Rev.	Type	Modified
Customer service Manager	0	Position	2008 08 09 15.21:10

Organization Units:

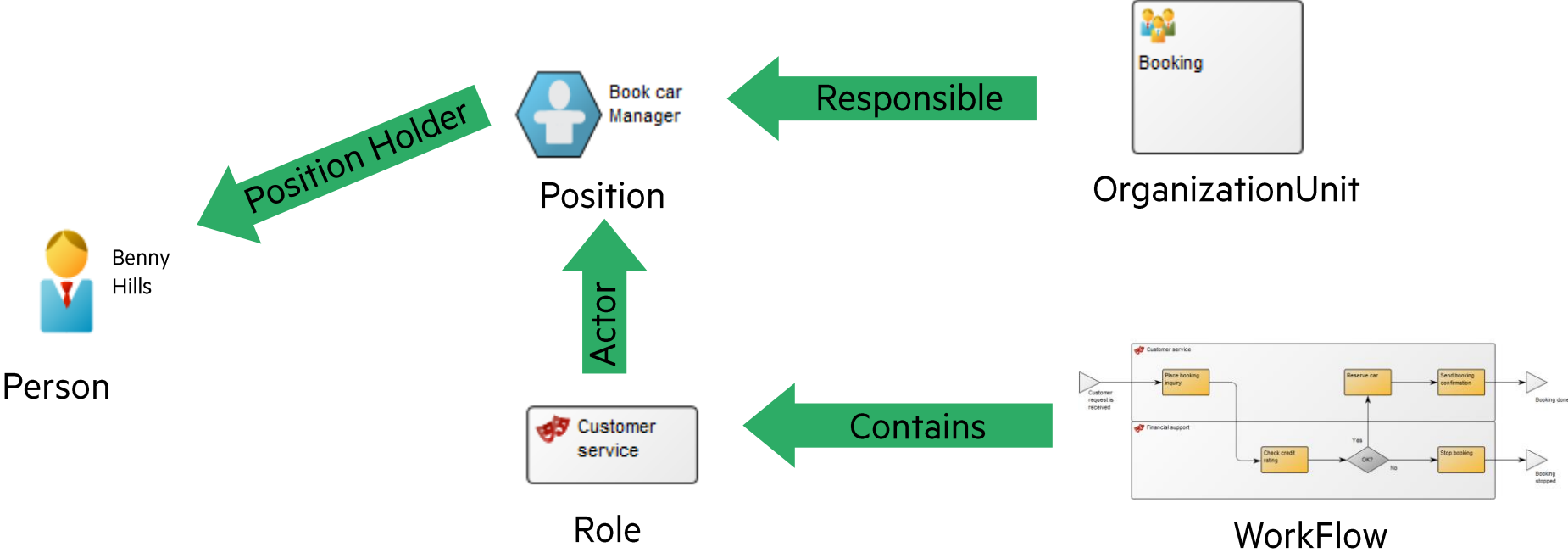
Name	Rev.	Type	Modified
Department North	0	OrganizationUnit	2015 07 17 15.04:57

OK Cancel Apply

It is not possible to insert from a grey field.

Use the buttons for Add and Delete instead..

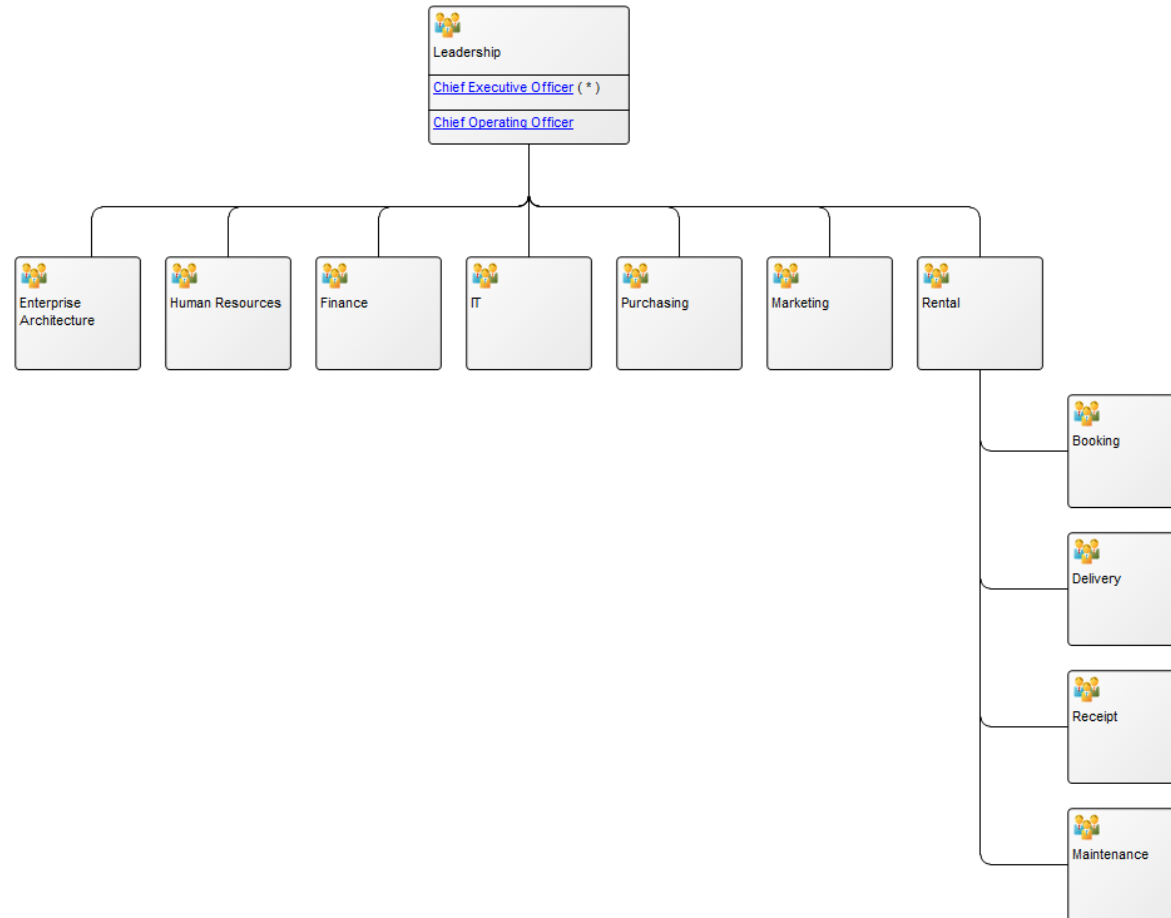
# Relations organization - process



# Demo - Organization

# Exercise 9 - Organization

**Purpose:** To learn how to draw organization diagram and describe organization units and positions. We will also learn more about editing a diagram.



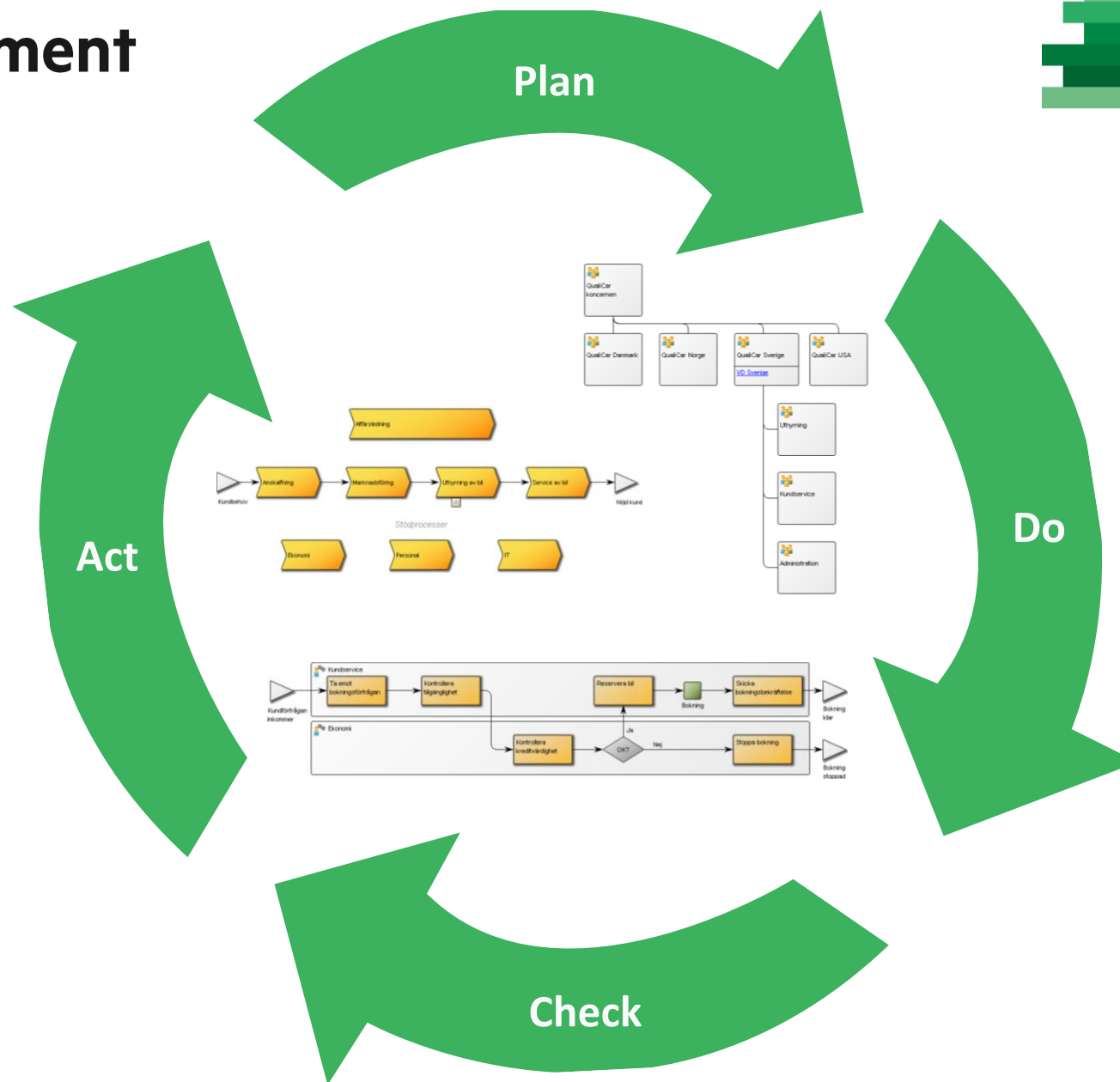


# Introduction to Change Management



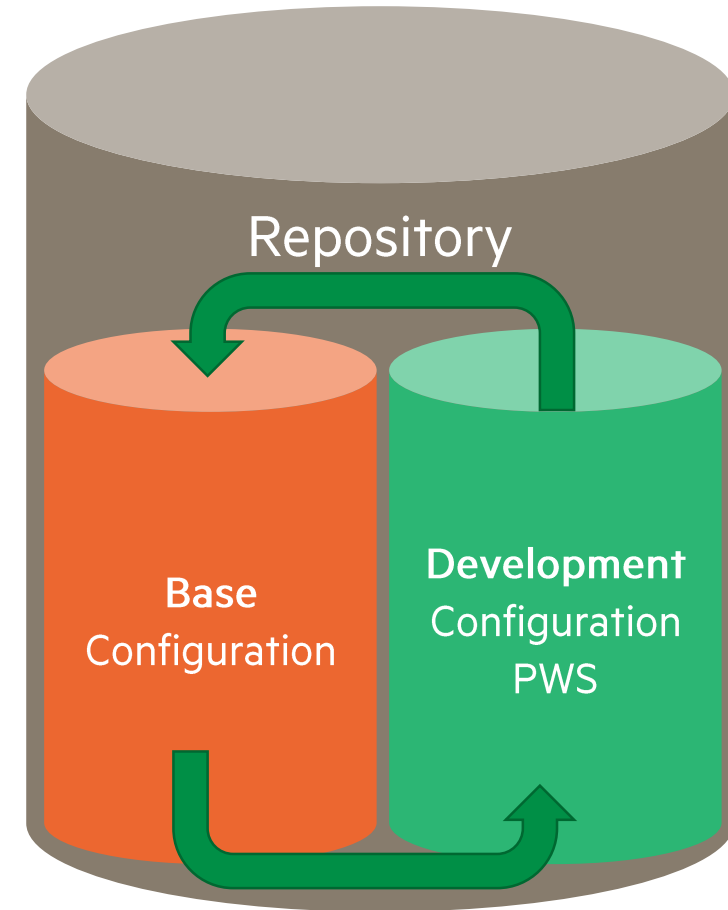
# Change Management

- Configurations
- Version (=revision)
- Governance Status



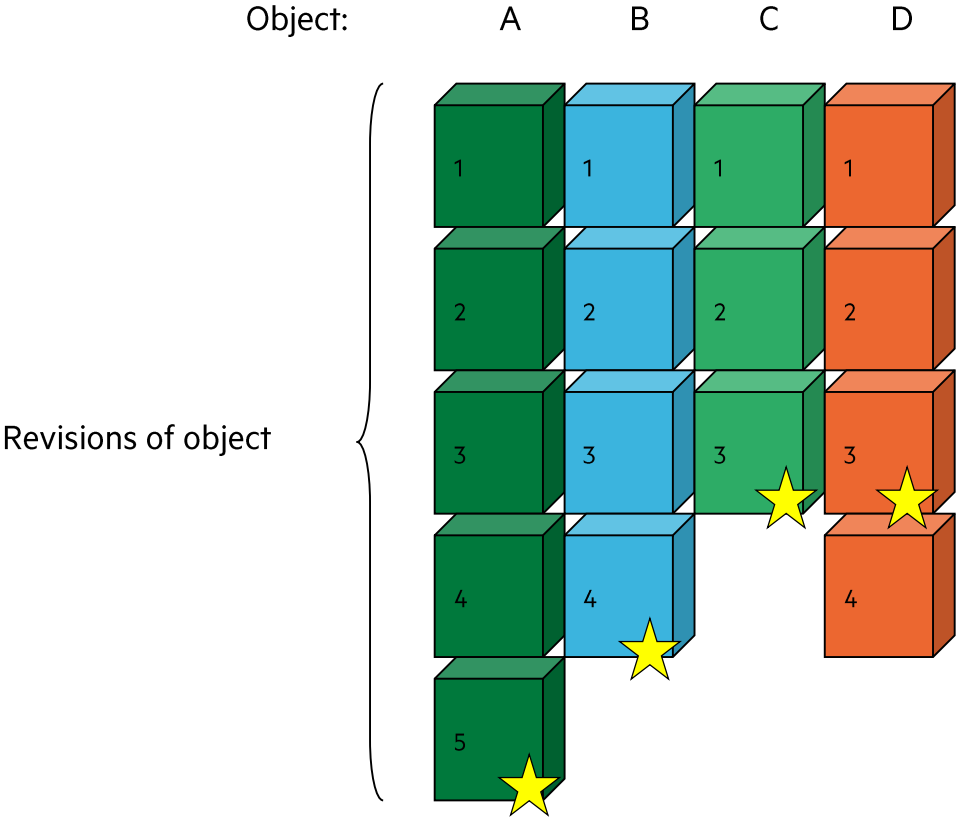
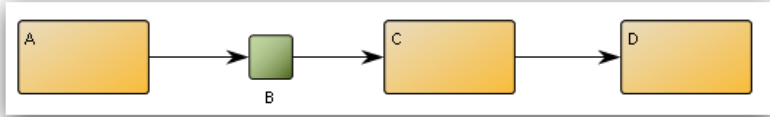
# Configurations

- Changes in the Development configuration are not visible in the Base
- All objects in the repository are available in Development
- Analyze the impact and Approve the changes
- Several users work in the Development Configuration simultaneously



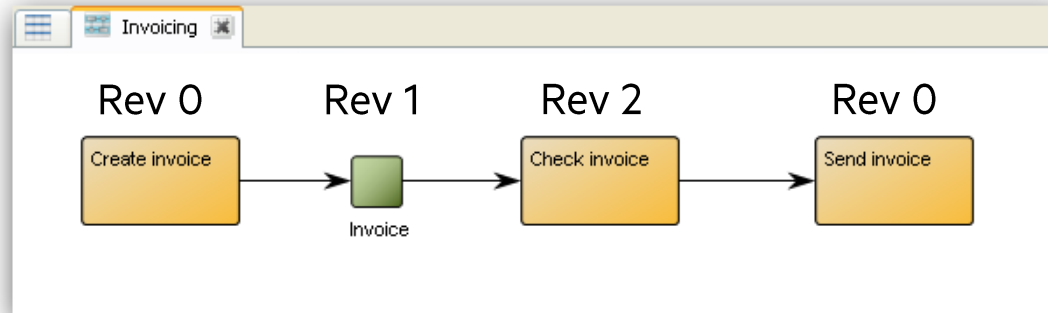
# Revisions

Create a new revision of an object when you need to keep track of changes

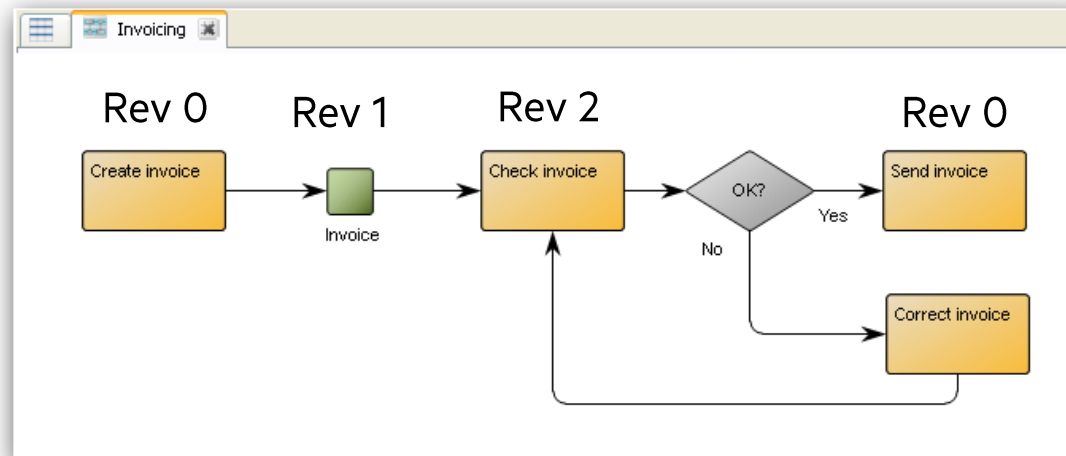


★ = Default revision

# Revisions



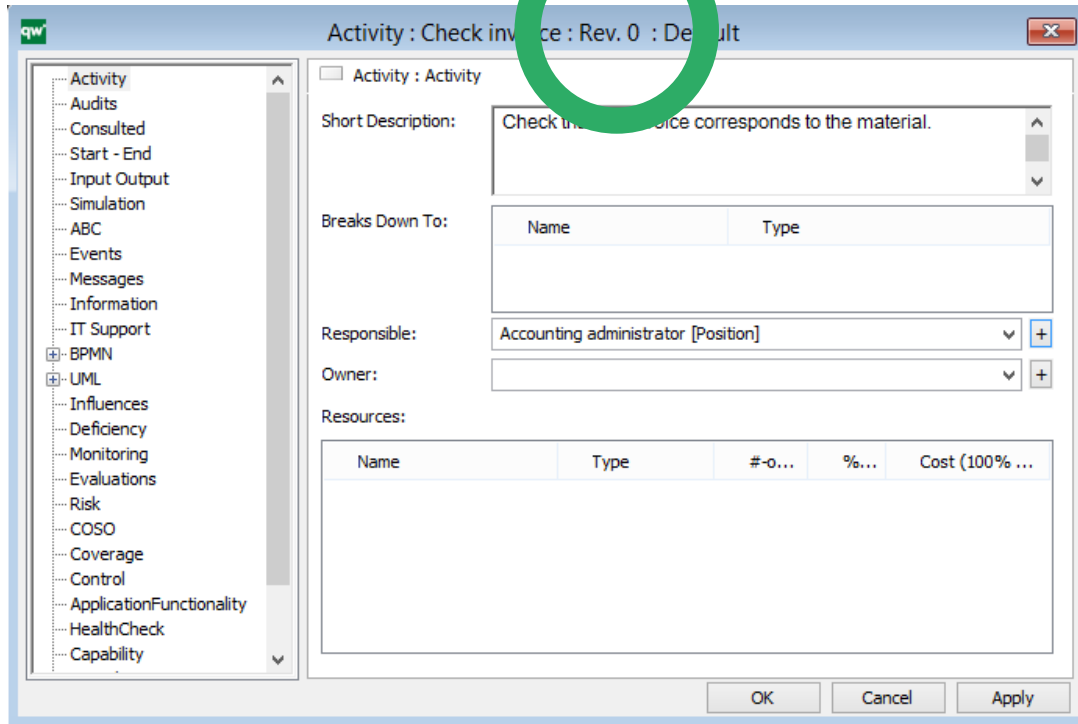
**Revision 0** for WorkFlowDiagram  
'Invoicing' can contain objects with  
different revision numbers



Create **revision 1** for  
WorkFlowDiagram 'Invoicing' when  
you want to change the drawing

# Revisions

Revision number for the object is displayed in the dialog



Activity : Check invoice : Rev. 0 : Default

Activity : Activity

Short Description: Check the invoice corresponds to the material.

Breaks Down To:

Name	Type
------	------

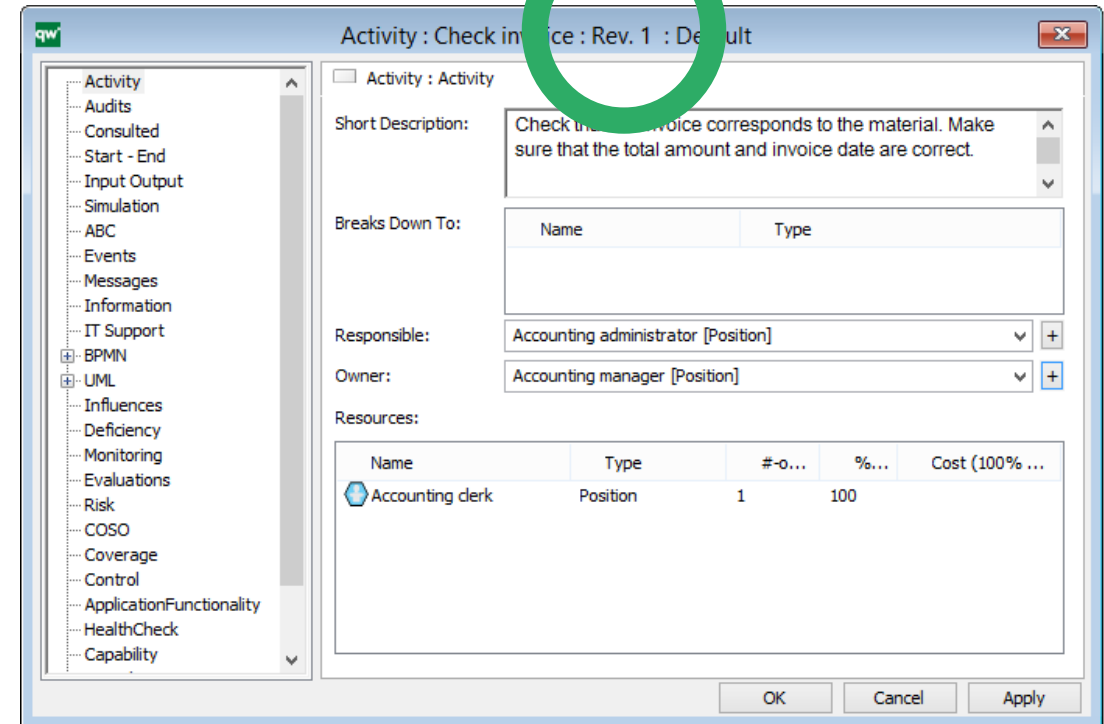
Responsible: Accounting administrator [Position]

Owner: [Empty]

Resources:

Name	Type	#-o...	%...	Cost (100% ...
------	------	--------	------	----------------

OK Cancel Apply



Activity : Check invoice : Rev. 1 : Default

Activity : Activity

Short Description: Check the invoice corresponds to the material. Make sure that the total amount and invoice date are correct.

Breaks Down To:

Name	Type
------	------

Responsible: Accounting administrator [Position]

Owner: Accounting manager [Position]

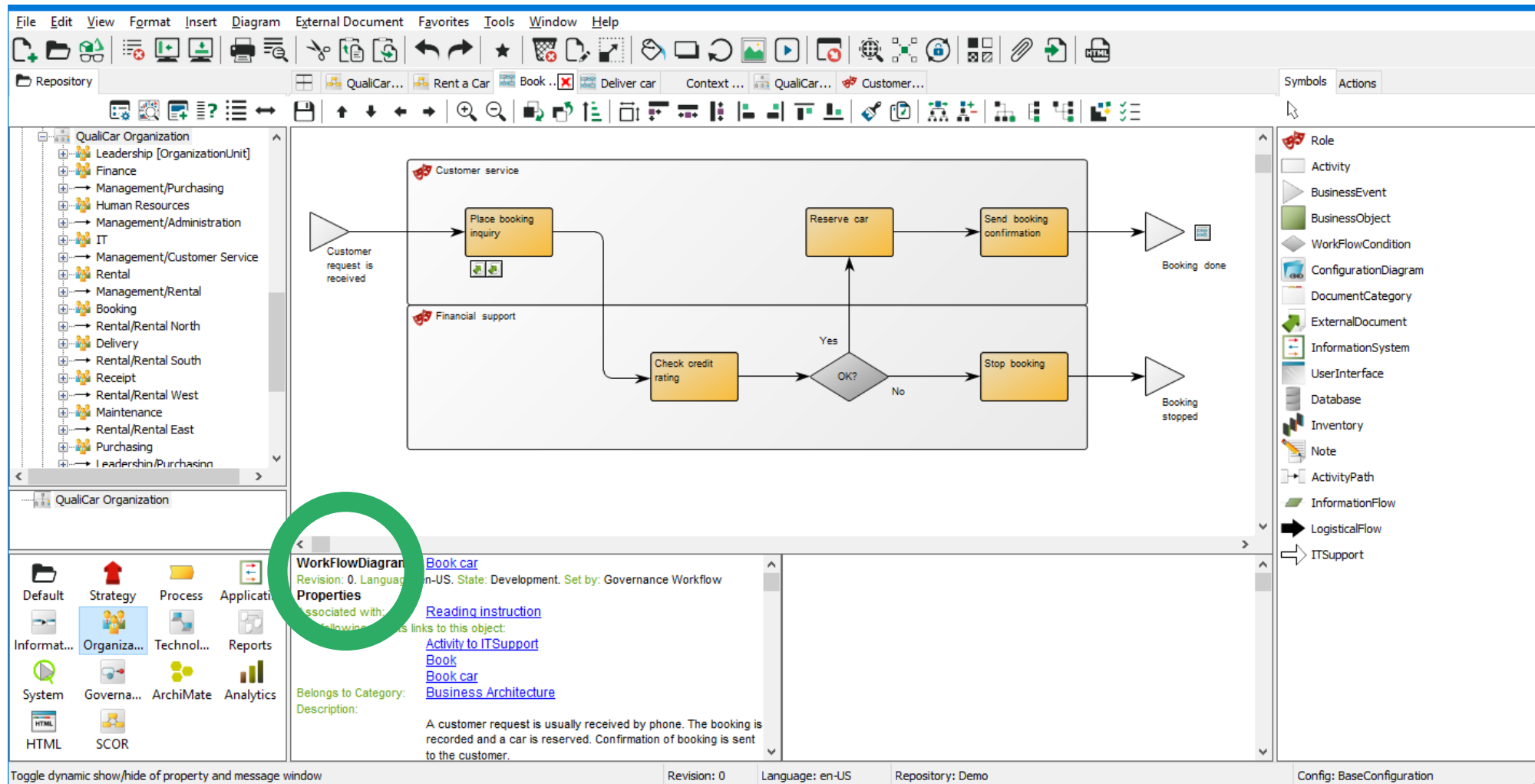
Resources:

Name	Type	#-o...	%...	Cost (100% ...
Accounting clerk	Position	1	100	

OK Cancel Apply

# Revisions

Revision number for the diagram (and the object) is displayed in the in the 'Property window'



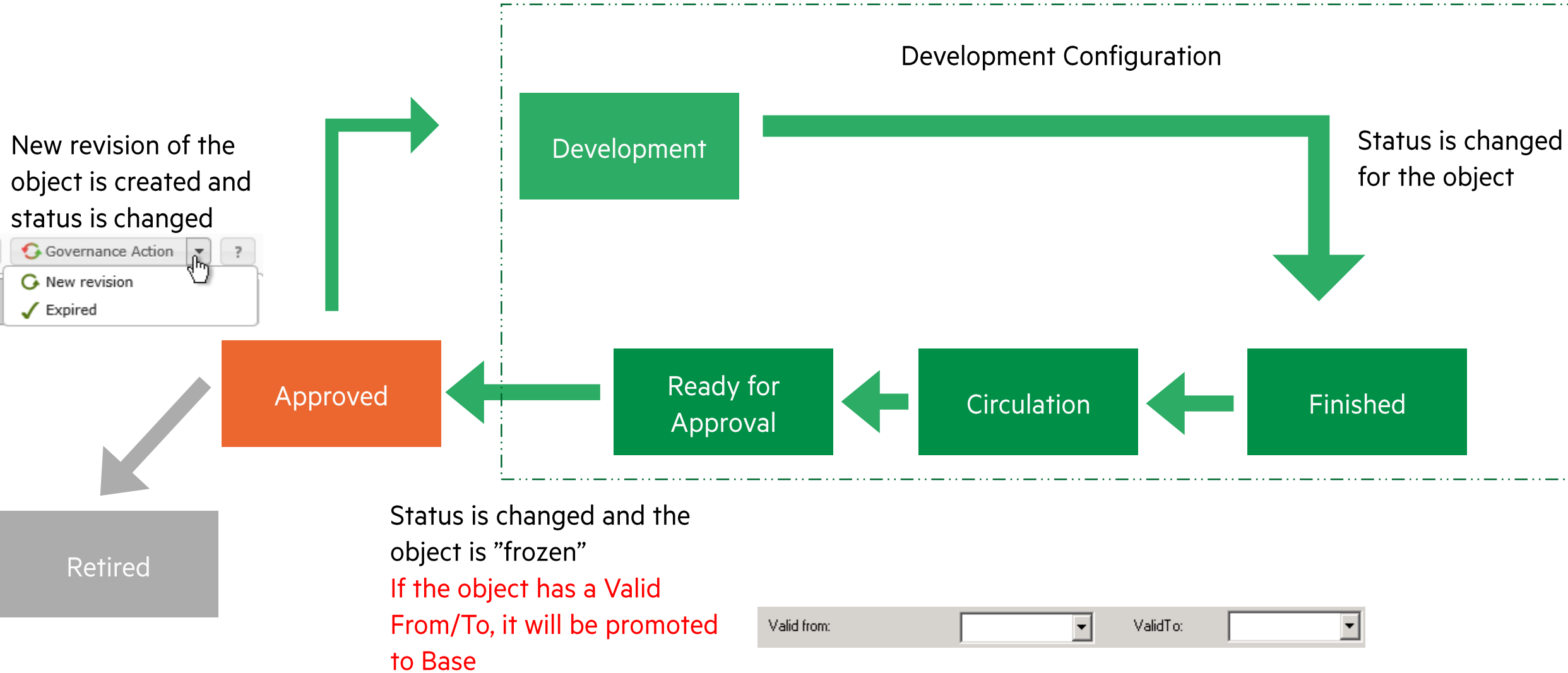
The screenshot displays the Qualiware software interface. The main workspace shows a workflow diagram for 'Book car' with two swimlanes: 'Customer service' and 'Financial support'. The 'Customer service' swimlane contains 'Place booking inquiry' and 'Reserve car'. The 'Financial support' swimlane contains 'Check credit rating', a decision diamond 'OK?', and 'Stop booking'. The flow starts with 'Customer request is received', leading to 'Place booking inquiry', then to 'Reserve car' (if OK) or 'Stop booking' (if No). 'Reserve car' leads to 'Send booking confirmation', which ends at 'Booking done'. 'Stop booking' ends at 'Booking stopped'.

The 'Property window' at the bottom is open to the 'WorkflowDiagram' properties. A green circle highlights the 'Revision: 0' field. Other visible properties include 'Language: en-US', 'State: Development', and 'Set by: Governance Workflow'. The 'Description' field contains the text: 'A customer request is usually received by phone. The booking is recorded and a car is reserved. Confirmation of booking is sent to the customer.'

At the bottom of the interface, the status bar shows: 'Revision: 0', 'Language: en-US', 'Repository: Demo', and 'Config: BaseConfiguration'.

# Status

An object has different states during its lifecycle



# Governance Workflow

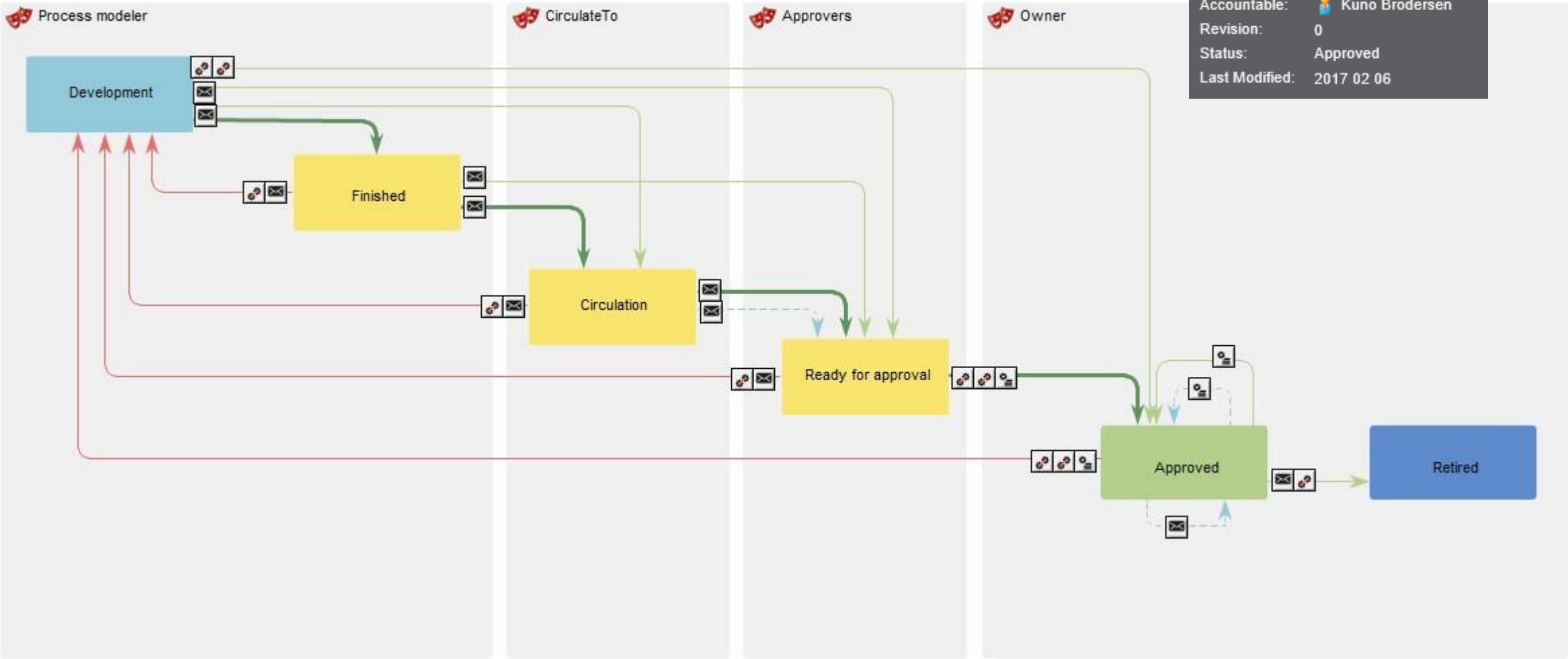


Governance Action

- Finished
- Circulate
- Ready for approval

Information

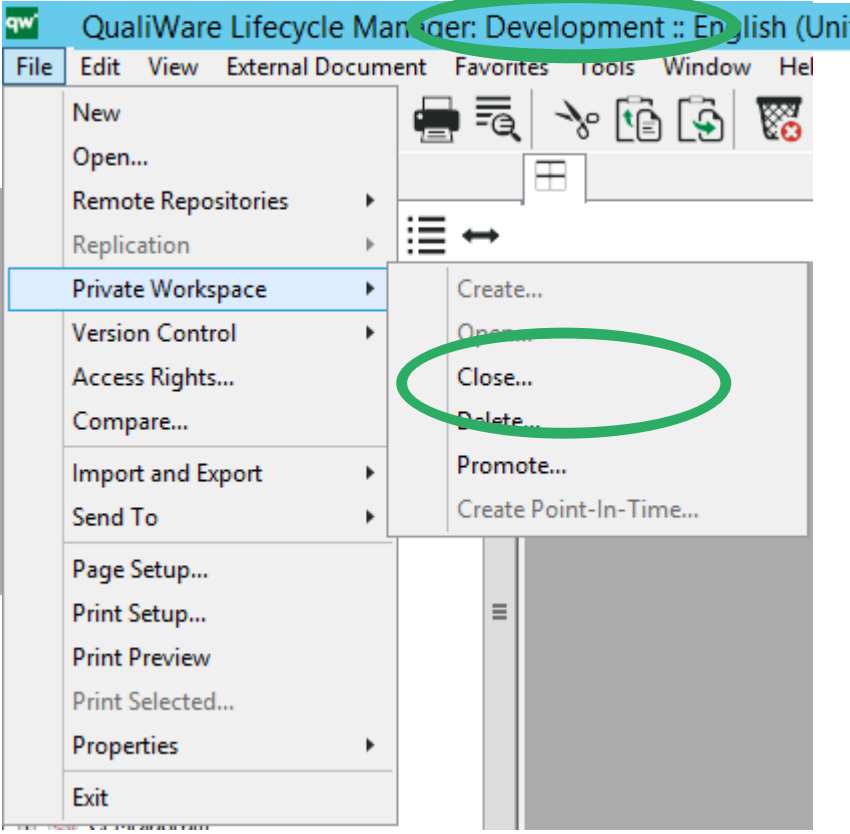
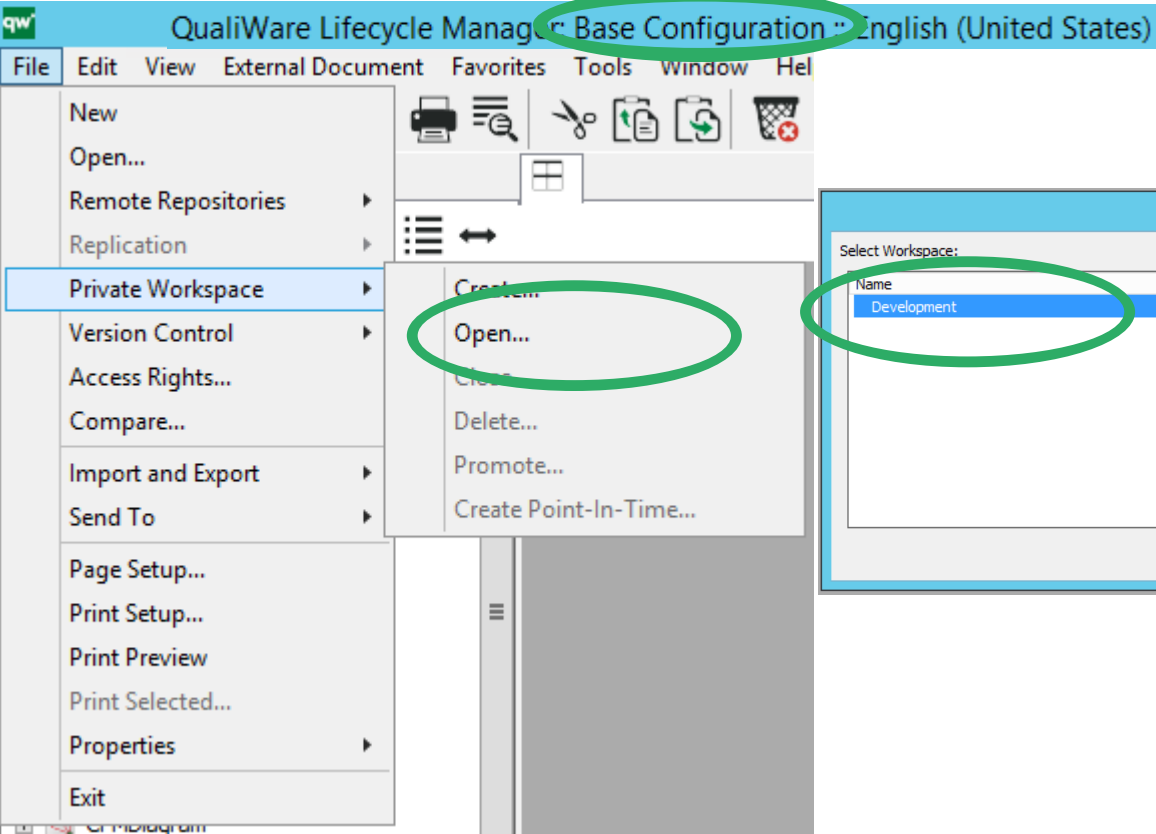
Responsible: Per Sigvardt  
Accountable: Kuno Brodersen  
Revision: 0  
Status: Approved  
Last Modified: 2017 02 06





# Switching Configurations

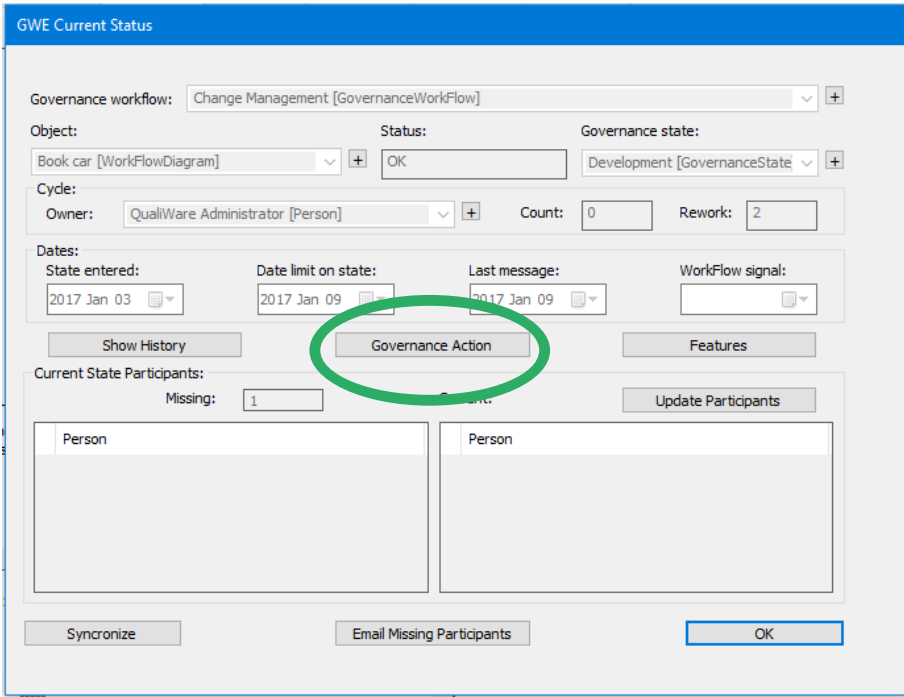
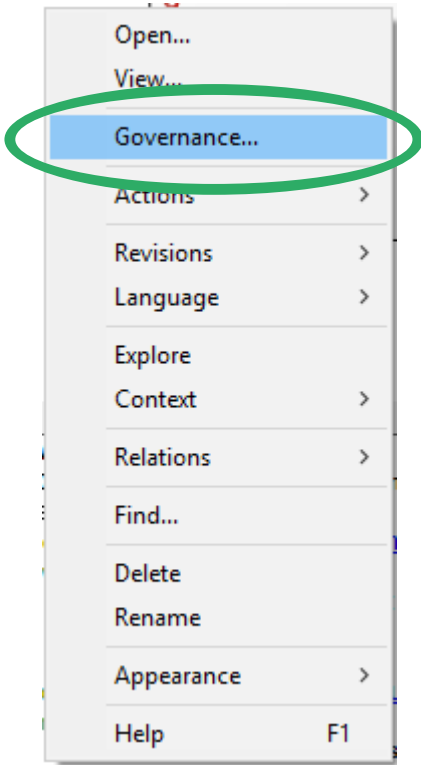
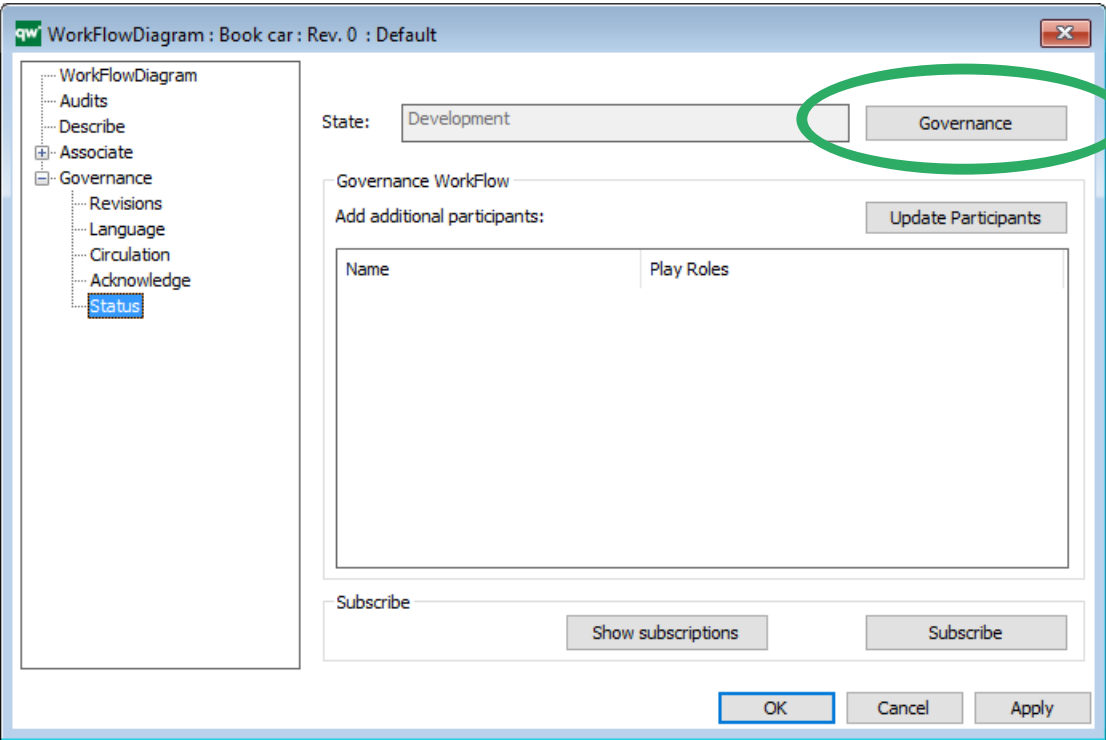
- Current location visible at the top of the window
- PrivateWorkspace Open/Close



# Governance Status/State



- Access the Governance Menu and Governance Actions



# Switching Configurations on the web

- Change Configuration to Development



### Change Configuration

---

Base

Base Configuration

Private Workspace

Development

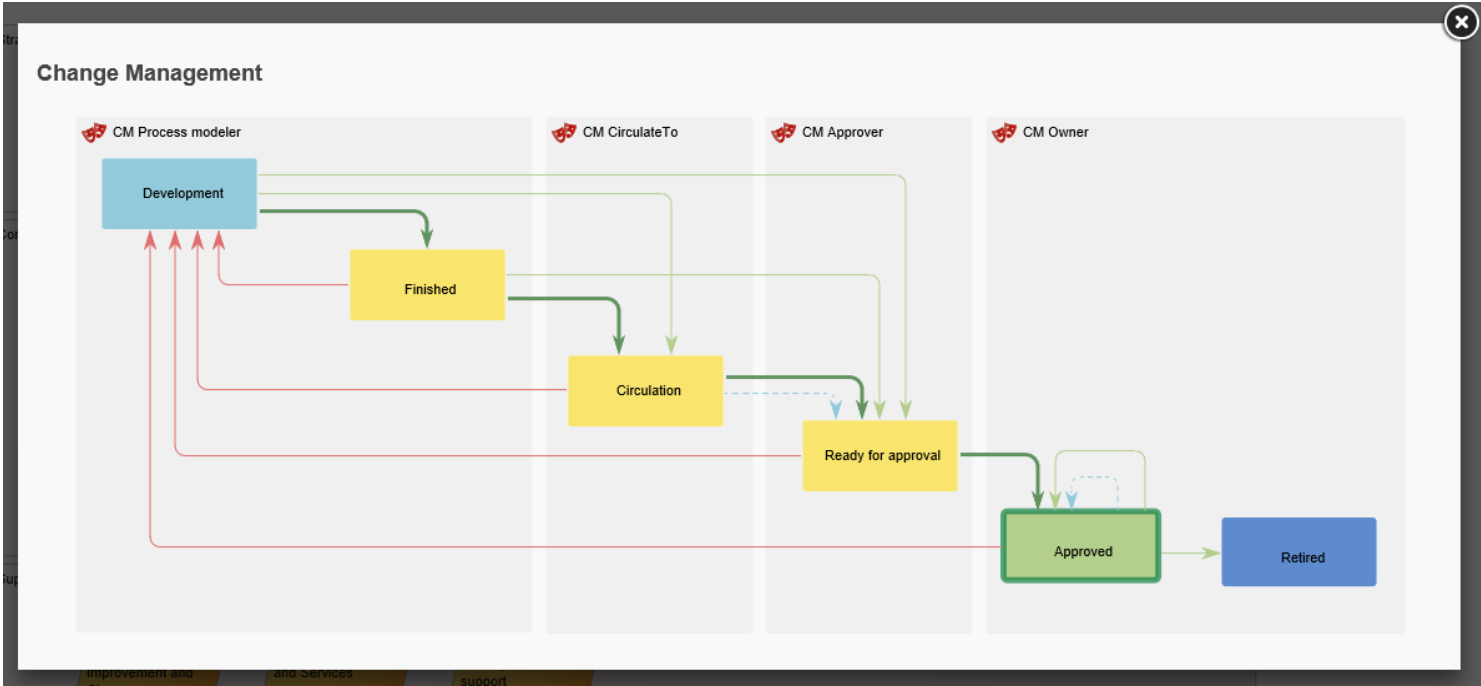
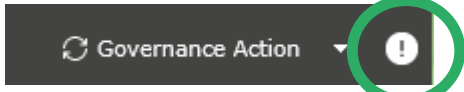
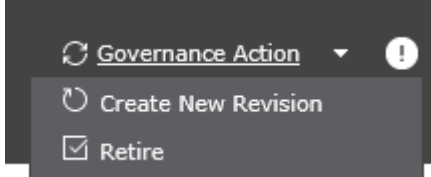
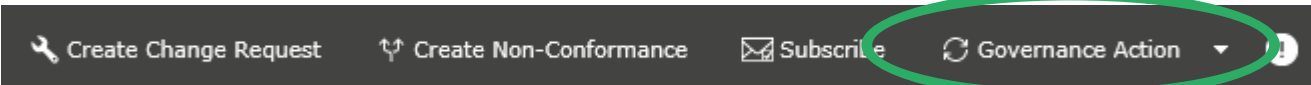
Submit Cancel



# Governance Actions on the web



- Access the Governance Actions

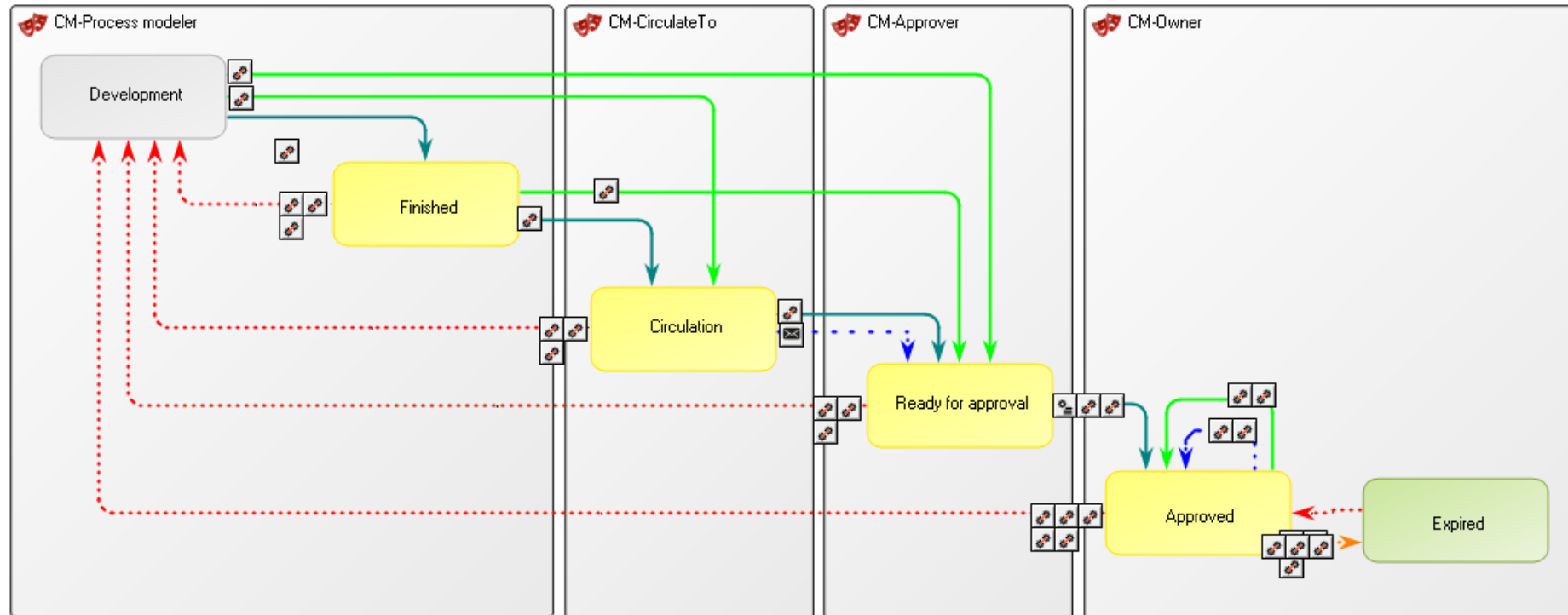




# Demo – Change management

# Exercise 13 – Change Management

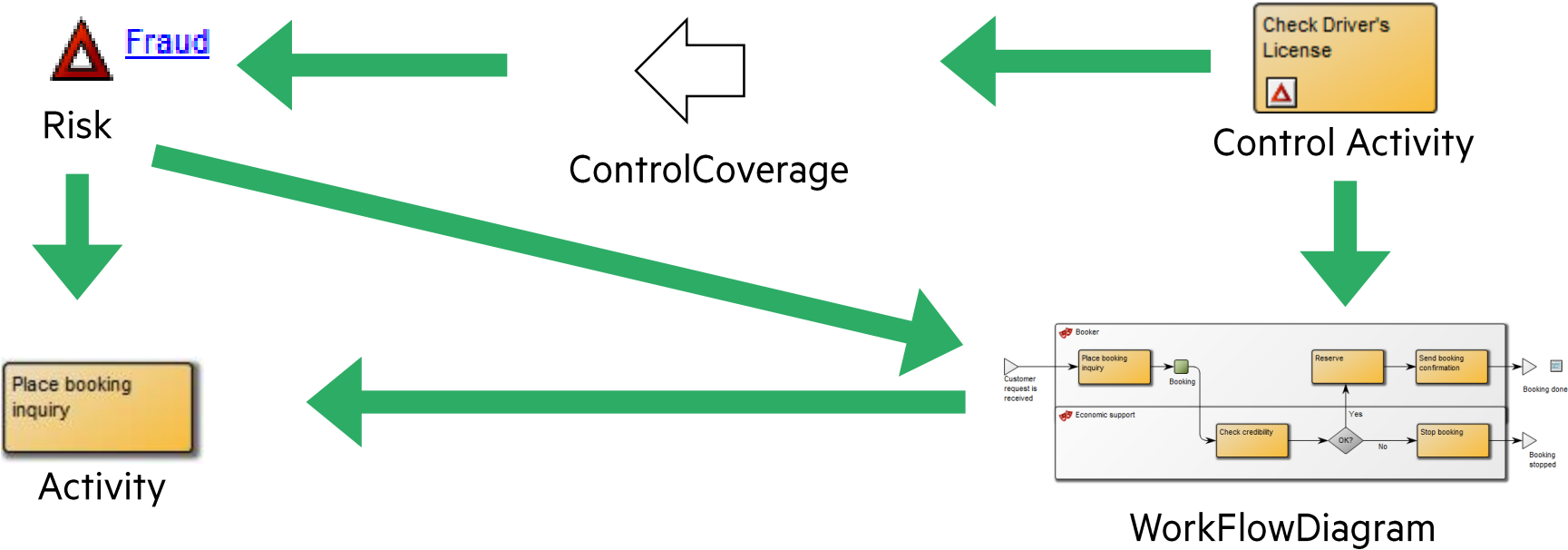
**Purpose:** Understand how to navigate between configurations and use states and revisions for change management in repository content.



# Risk Management

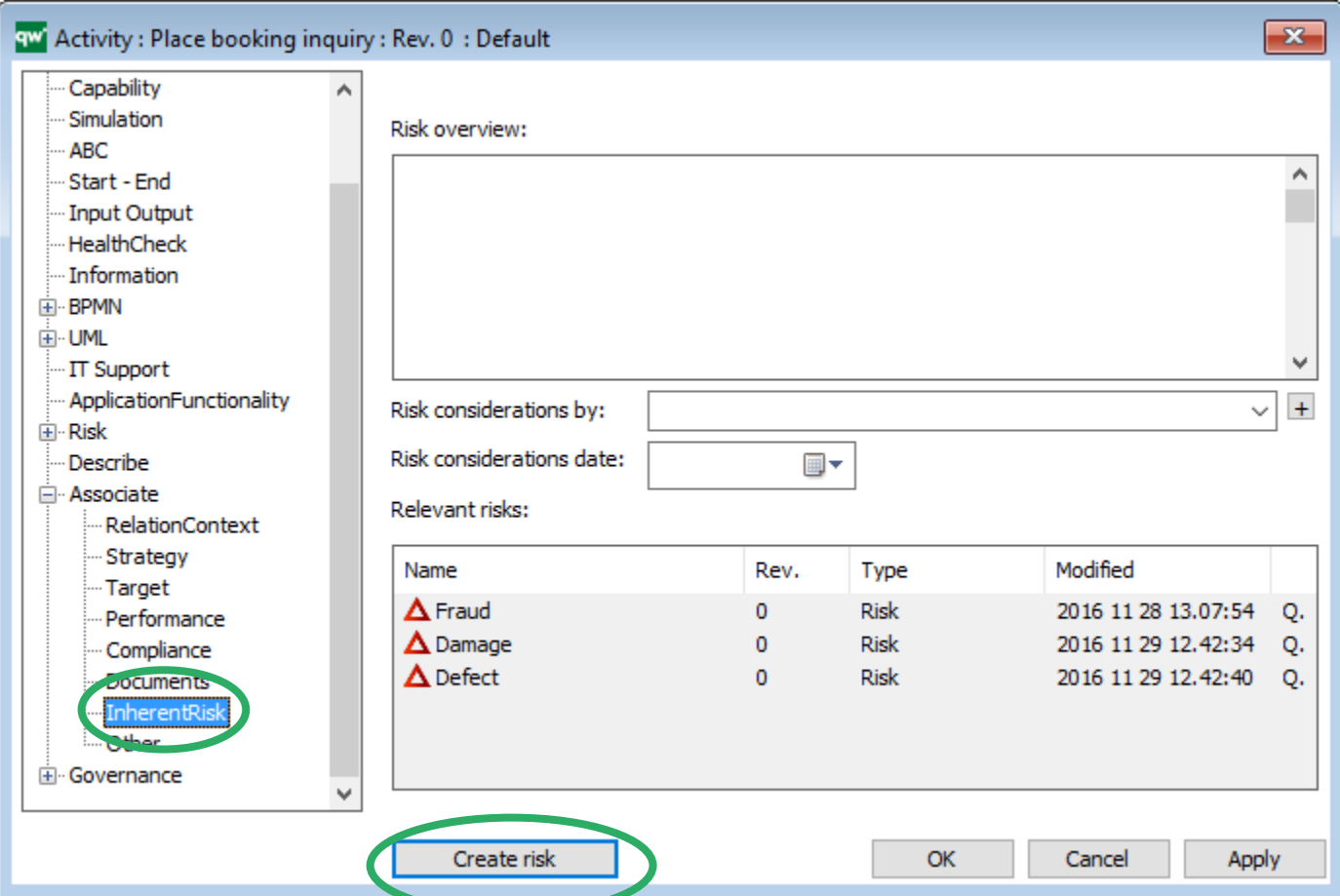


# Relations Risk - Activity





# Symbols and InherentRisk



Activity : Place booking inquiry : Rev. 0 : Default

Risk overview:

Risk considerations by:

Risk considerations date:

Relevant risks:

Name	Rev.	Type	Modified	
▲ Fraud	0	Risk	2016 11 28 13:07:54	Q.
▲ Damage	0	Risk	2016 11 29 12:42:34	Q.
▲ Defect	0	Risk	2016 11 29 12:42:40	Q.

Create risk

OK Cancel Apply



Overview text regarding the risk assessment



Risk assessor and date



Add risks via the Create risk button

# Risk Symbol



qw Risk : Fraud : Rev. 0 : Default

- Risk
- Audits
- Scoring
- Residual
- Assessments
- Concerns
- COSO Category
- Control
- Describe
- Associate
- Governance

Short description:

Cause:

Type: Business Continuity + Likelihood: High

Likelihood rationale:

Significance: Substantial

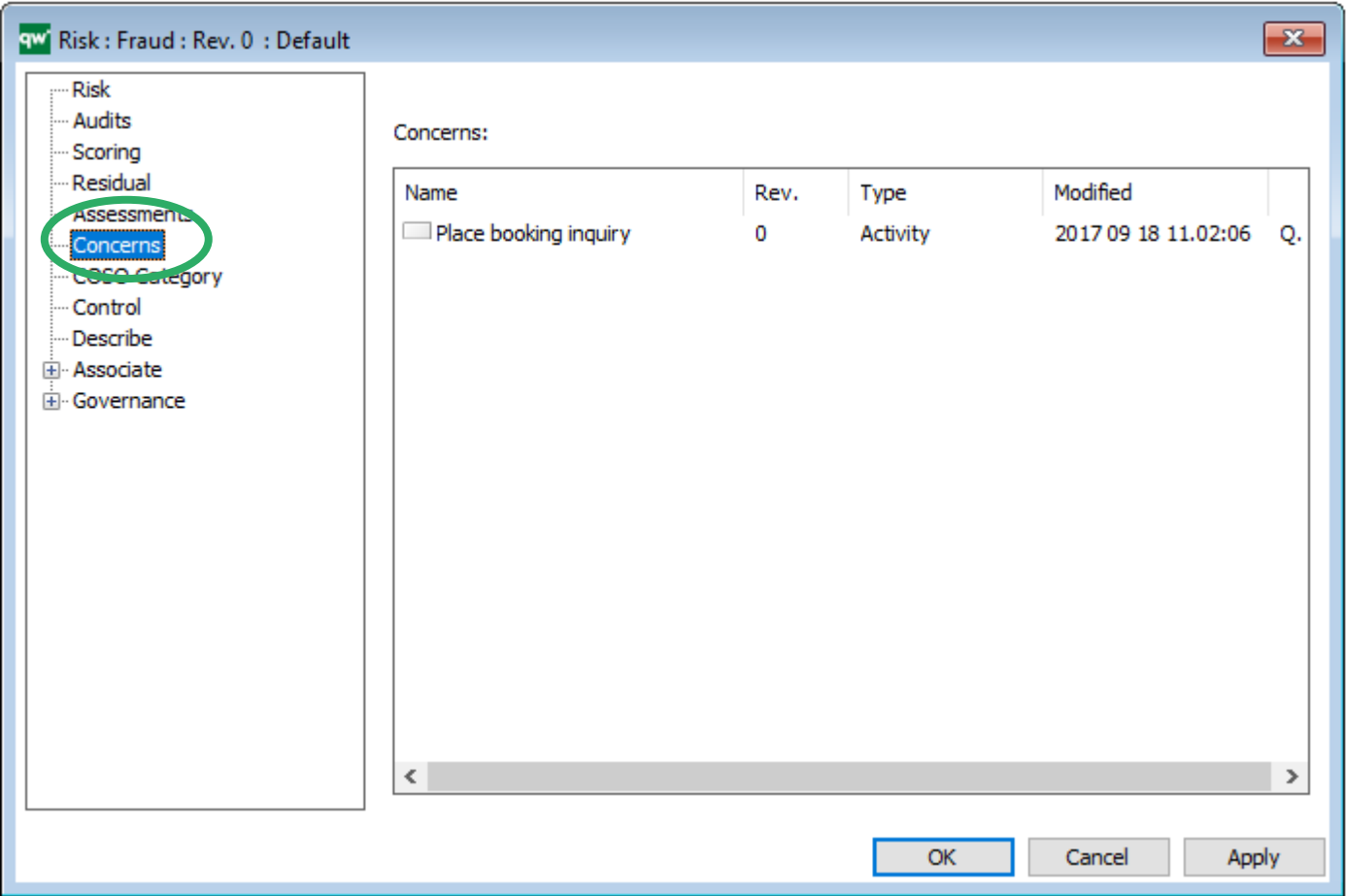
Impact:

Impact rationale:

OK Cancel Apply

- Describe the risk
- Elaborate on cause
- Specify risk type and likelihood
- Specify significance

# Risk Symbol



Risk : Fraud : Rev. 0 : Default

- ... Risk
- ... Audits
- ... Scoring
- ... Residual
- ... Assessment
- Concerns**
- ... COCO Category
- ... Control
- ... Describe
- + Associate
- + Governance

Concerns:

Name	Rev.	Type	Modified	
<input type="checkbox"/> Place booking inquiry	0	Activity	2017 09 18 11.02:06	Q.

OK Cancel Apply



These objects are affected by the risk

# Risk Scoring



qw Risk : Fraud : Rev. 0 : Default

- Risk
- Audits
- Scoring**
- Residuals
- Assessments
- Concerns
- COSO Category
- Control
- Describe
- Associate
- Governance

**Likelihood**

Automation: Remote      Likelihood score: 3

Routine: Remote       Manual

Frequency: Remote

Complexity: Remote

**Significance**

Financial impact: Negligible      Significance score: 3

Brand image: Negligible       Manual

Political influence: Negligible

Business impact: Negligible

OK      Cancel      Apply

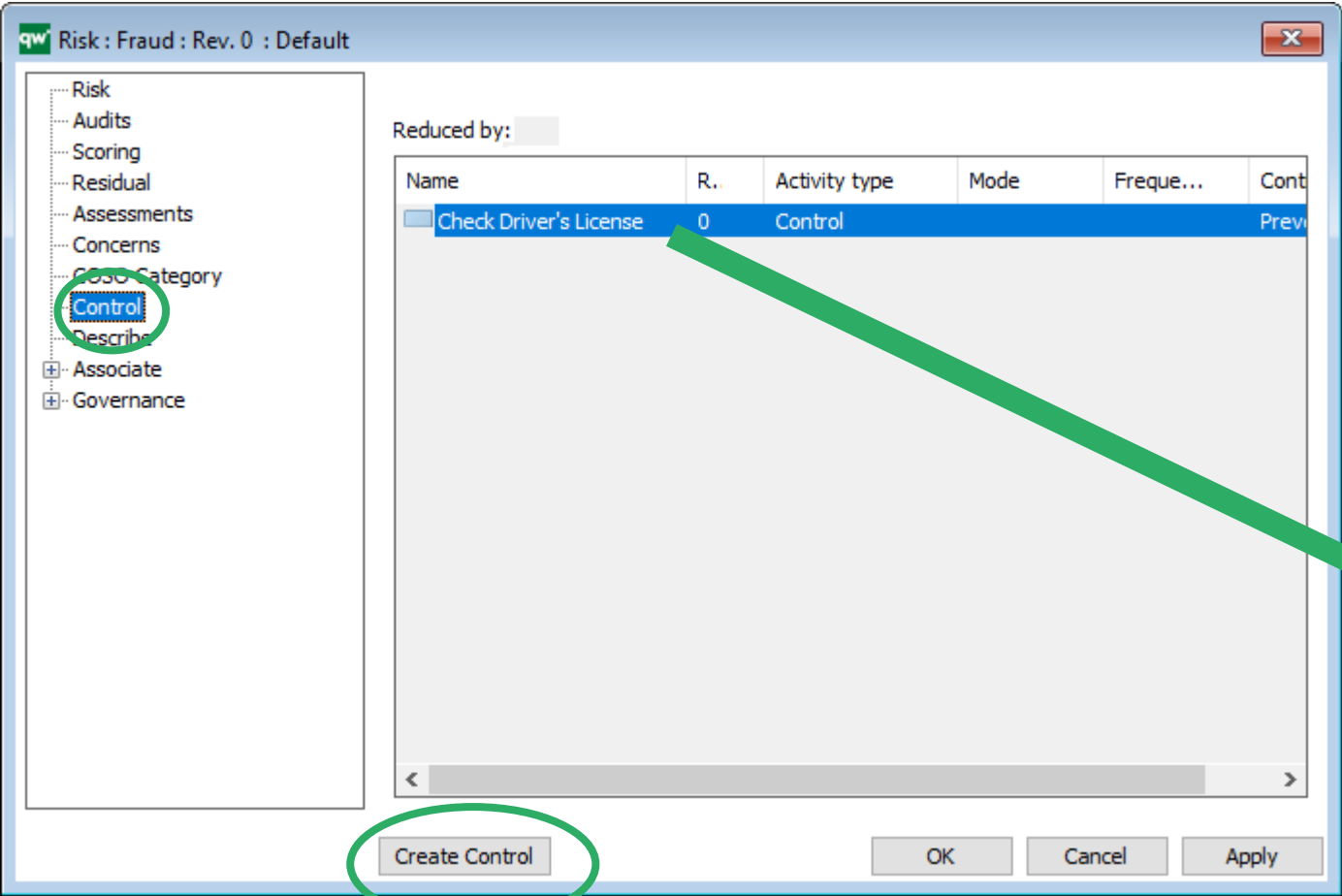


Manually set Likelihood score



Manually set Significance score

# Risk Control

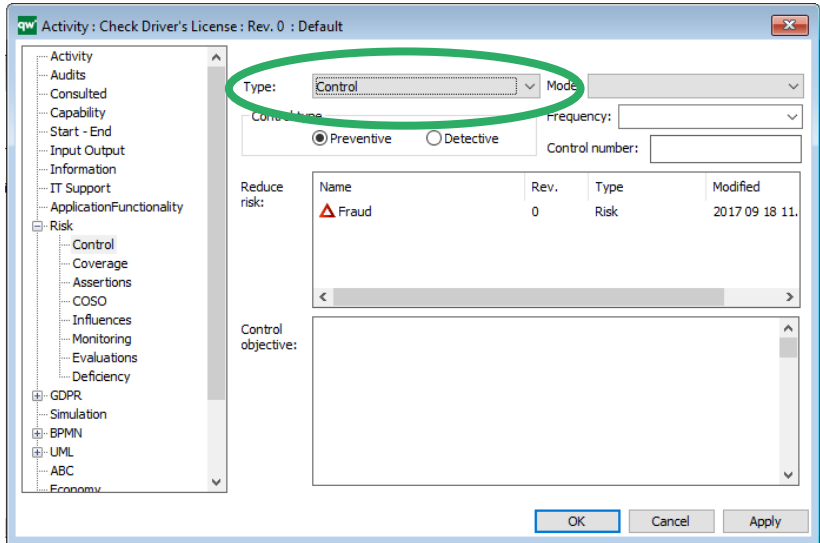


qw Risk : Fraud : Rev. 0 : Default

Reduced by:

Name	R.	Activity type	Mode	Freque...	Cont
<input type="checkbox"/> Check Driver's License	0	Control			Prev

Use the Create Control button to create control activities for your risks



qw Activity : Check Driver's License : Rev. 0 : Default

Type:  Mode:

Preventive  Detective Frequency:

Control number:

Reduce risk:

Name	Rev.	Type	Modified
▲ Fraud	0	Risk	2017 09 18 11.

Control objective:

# Control Activities



Activity : Fraud Control : Rev. 0 : Default

Control coverage:

Name	Rev.	Type	Modified	
⇒ Fraud Control - coverage for:...	0	ControlCoverage	2016 11 29 15:52:24	Q.

Create ControlCoverage for this Control

OK Cancel Apply



Use the Create ControlCoverage button to create ControlCoverage for your risks

# ControlCoverage CoverageLevel



ControlCoverage : Fraud Control - coverage for: Fraud : Rev. 0 : Default

- ControlCoverage
  - Audits
    - CoverageLevel**
    - CostLevel
    - Describe
    - Associate
    - Governance

**Likelihood coverage level (the higher, the better)**

Timeliness:	Very high	Coverage score:	1
Automation:	Very high		<input checked="" type="checkbox"/> Manual
Routine:	Very high		
Employee Risk Maturity:	Very high		

Coverage rationale:

**Significance coverage level (the higher, the better)**

Financial impact:	Very high	Coverage score:	2
Brand image:	Very high		<input checked="" type="checkbox"/> Manual
Political influence:	Very high		
Business impact:	Very high		

Coverage rationale:

OK Cancel Apply



Manually set Likelihood Coverage score



Manually set Significance Coverage score

# ControlCoverage CostLevel



ControlCoverage : Check Driver's License - coverage for: Fraud : Rev. 0 : Default

- ControlCoverage
  - Audits
  - CoverageLevel
  - CostLevel**
  - Describe
  - Associate
  - Governance

Cost of Control level (the lower, the better)

Control frequency:	Remote	Cost of Control score:	3
Operational cost:	Remote	<input checked="" type="checkbox"/> Manual	
Cost of human resource:	Remote		
Cost rationale:	<div style="border: 1px solid gray; height: 20px;"></div>		

OK Cancel Apply



Manually set Cost of Control score




# Toolbar: Risk Management and Analysis


Symbols Actions

- Application Portfolio Management
- Audit
- Change Management
- Compare Revisions Relevant for all diagram t
- Enterprise Investment
- HRM
- Risk Management - Financial and Compliance
  - External Context
  - Major Processes in Business Unit
  - Organization for Business Unit
  - Application Architecture
  - SOX SOX Project Model
  - Import Chart of Accounts
  - Repository view of Financial statements
  - Create Business Process to Significant A
  - Build Activity-generates-Risk Matrix
  - Repository view of Risks
  - Repository view of Activities, Controls a
  - Show All Controls / Show Key Controls e
  - Coverage matrix
  - Build Evaluation Set
  - Management Report
  - Create Financial Statement and Account
  - Create List of Control Matrix
  - BP Business Process - Key Characteristics
  - BN Business Process Network - Overview
  - BD Business Diagram - Overview
  - PE Personal Engagement
  - Build Risk HeatMap for process area
  - Build Control Coverage Map for HeatMa
- Risk Management - Strategic and Operational

2

 Build Risk HeatMap for process area

5

 Build Control Coverage Map for HeatMap

1

Set criteria for the HeatMap

Type: All types

Likelihood greater than or equal to: Remote

Significance greater than or equal to: Negligible

Strategic alignment with at least one of:

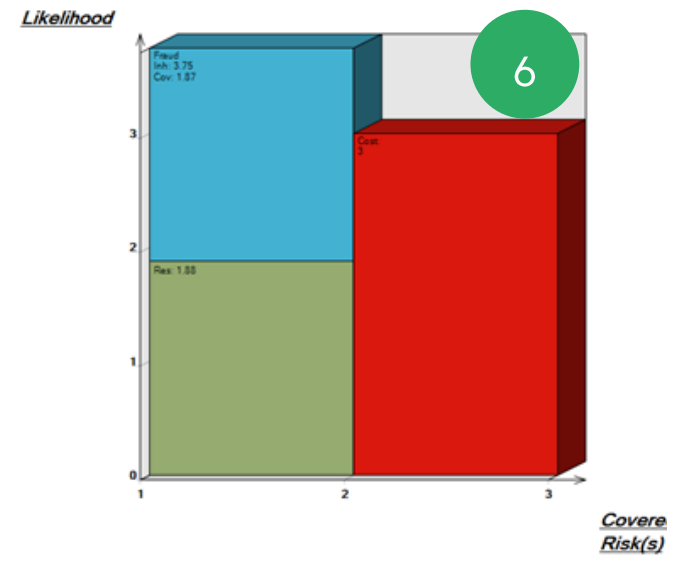
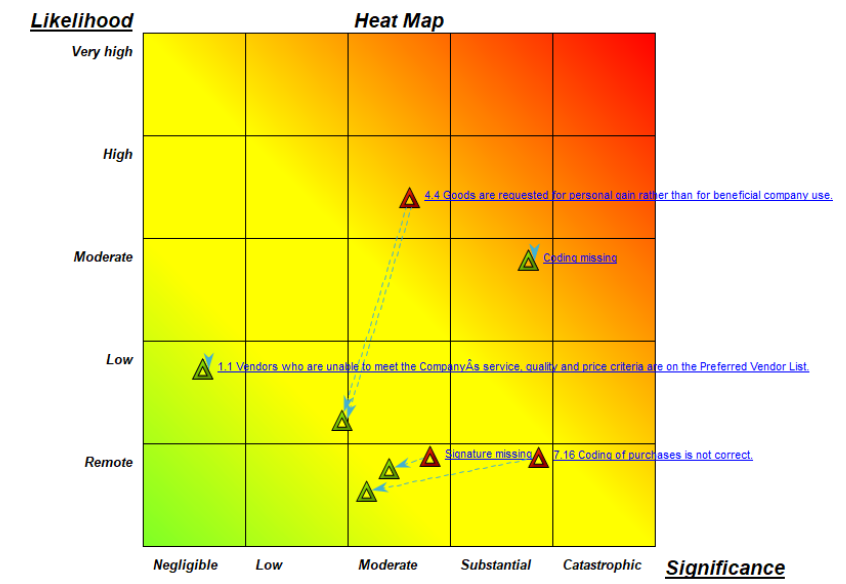
Name	Type	Modified	...

Show Inherent Risk

Show Residual Risk

OK Cancel

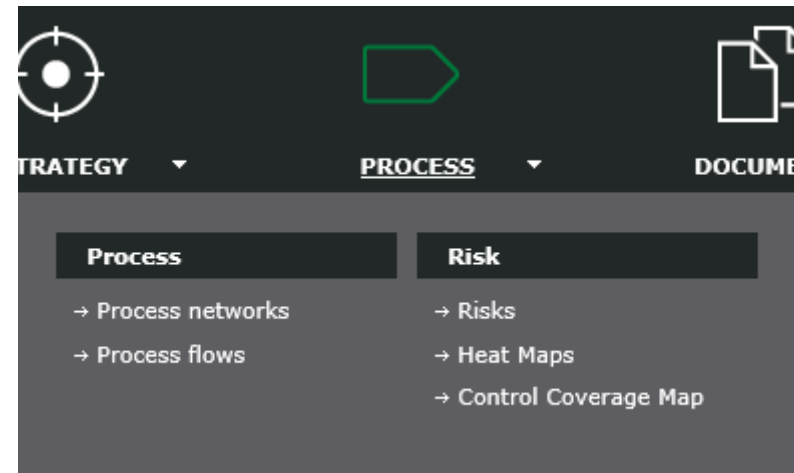
3



6

# Listing risks

- List of all Risks
- Risks per workflow



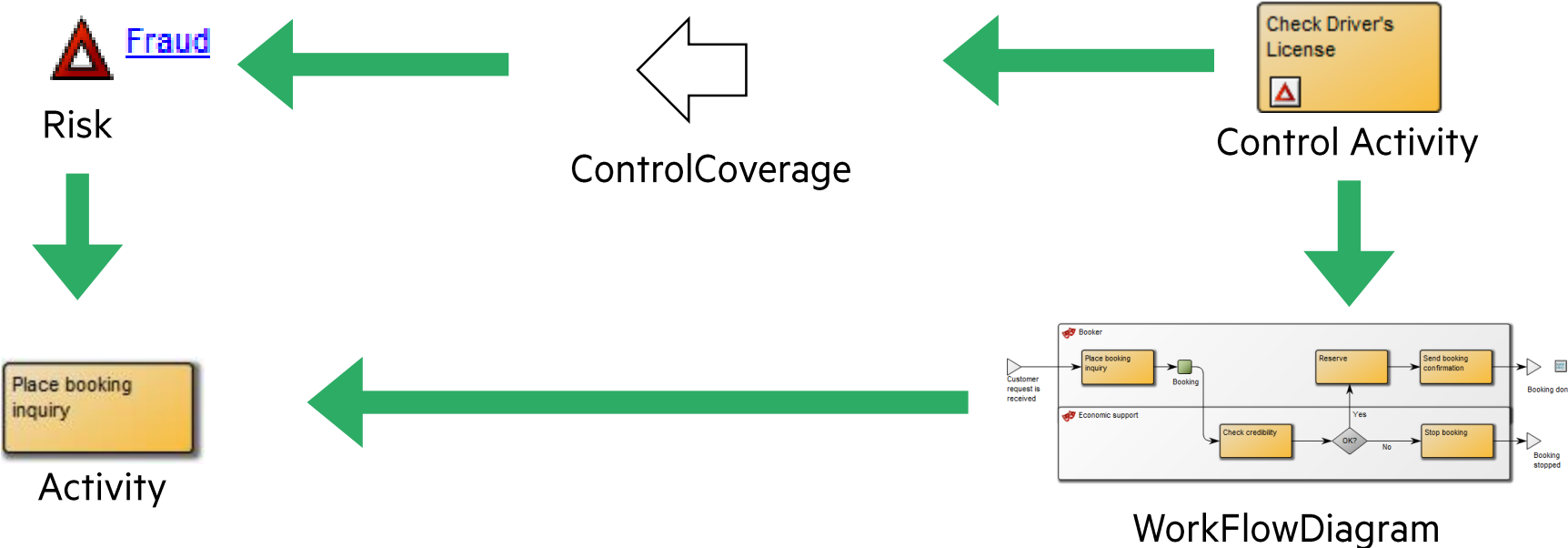
Name	Concerns	Likelihood	Significance	Type	Heat Map	Control activity	Control responsible	Residual likelihood	Residual significance
Secure right e-mail sender	Approve payment	High	Substantial	Financial	Financial Department reduced	Check mail address	Managing Director / Financial Department	Moderate	Low
Secure right payment	Make final registration and file for payment according to payment terms	High	Low	Financial	Financial Department reduced	Check amount according to order specification	Financial Department	Low	Low
Secure supplier reliability	Approve invoice according to delivery note and price	Moderate	Substantial	Financial	Financial Department reduced	Check supplier status	Budget responsible	Remote	Negligible

# Demo – Risk Management



# Exercise 10 – Risk Management

Purpose: Understand how to document and analyze risks.

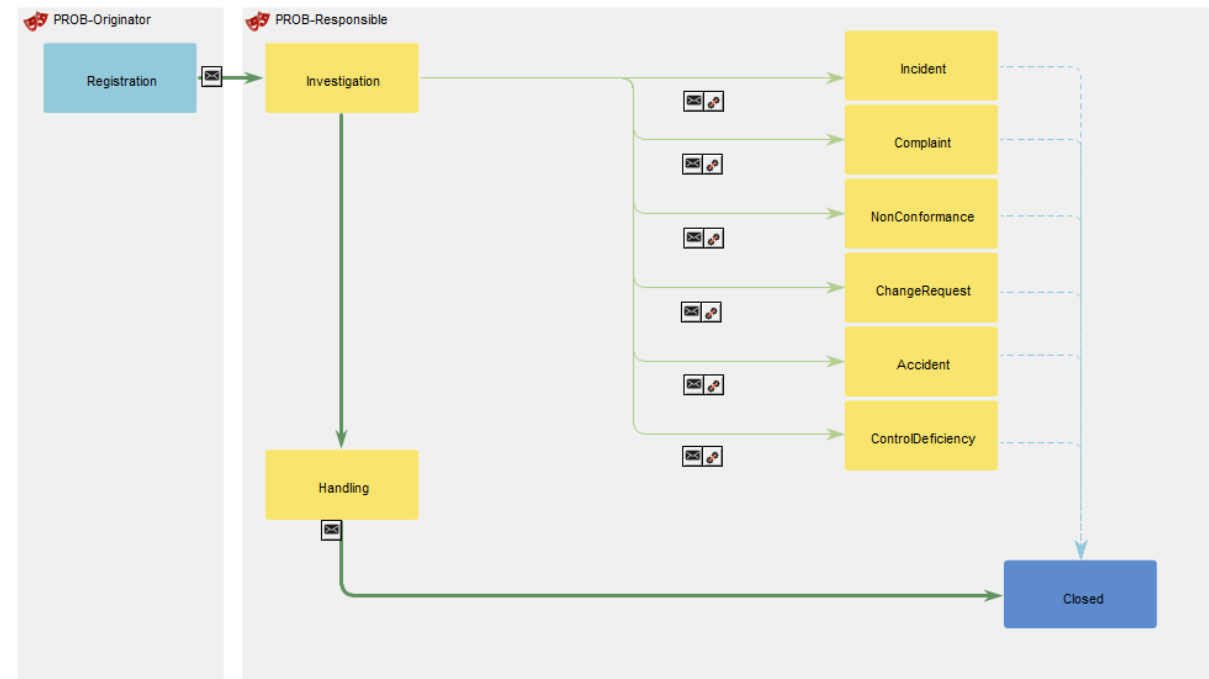
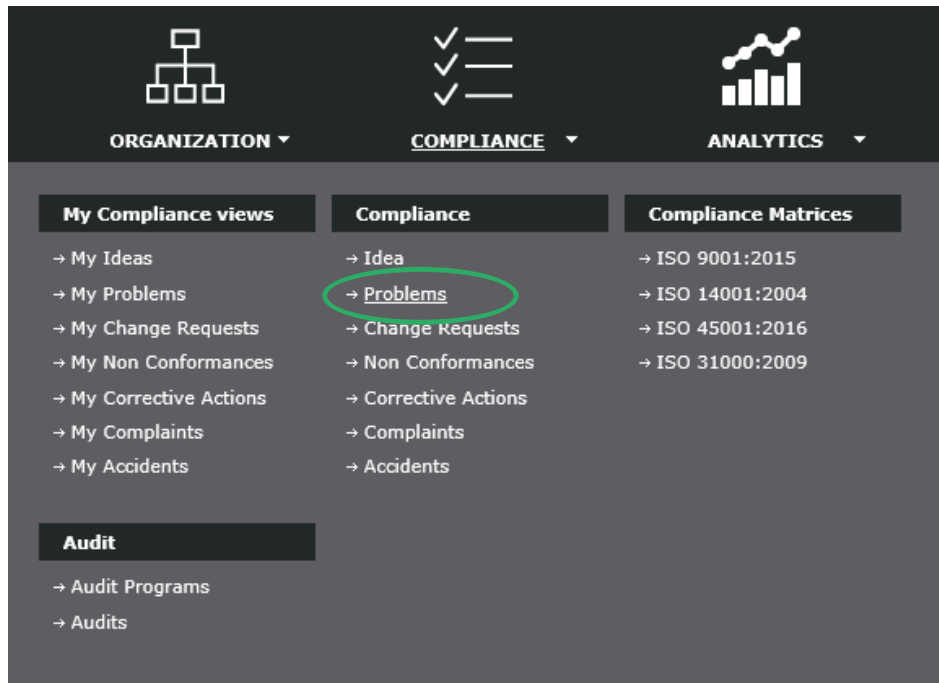


# Problem Management



# Problem Management

- “Problem” is a repository object – functions like a ticket
- Typically submitted on the web or via the app
- Transfer into Incident, Complaint, NonConformance, ChangeRequest, Accident or ControlDeficiency



# Problem - Registration



**Problem**

**Handling**

Name:

Description:

Paragraph St... **B** *I* U A

Picture:

Paragraph St... **B** *I* U A

Associated Documents:

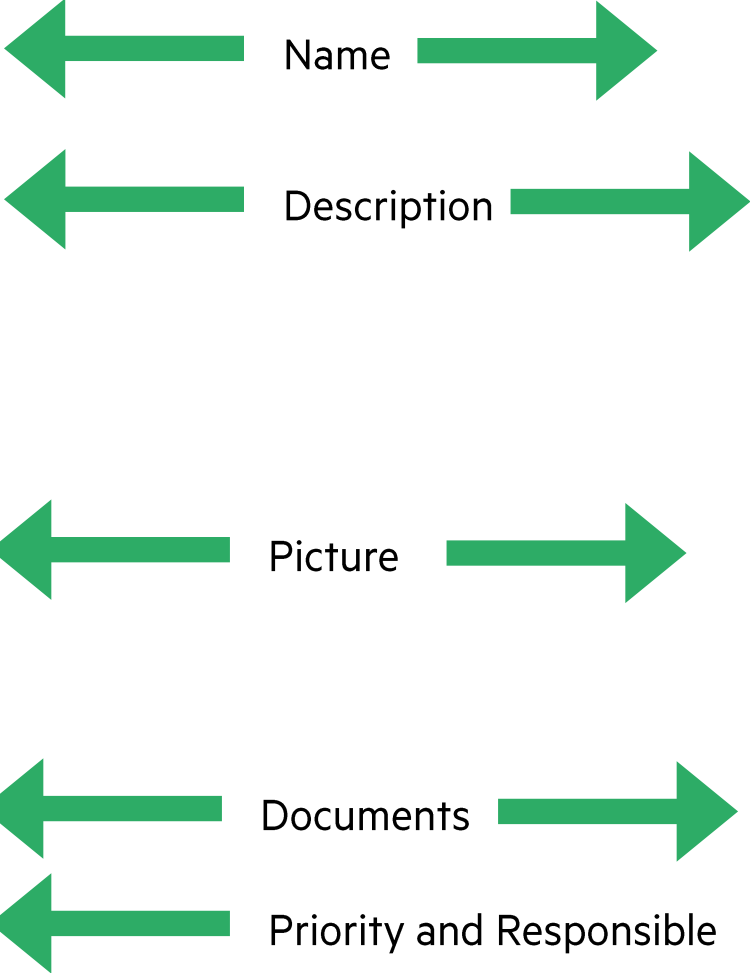
Name	Last modified	By
No records to display.		

Page: 1 of 1 Go Page size: 20 Change Item 0 to 0 of 0

Priority:

Responsible:

OK Cancel Apply



← Create Problem

**Problem** Handling Other

Name:

Description:

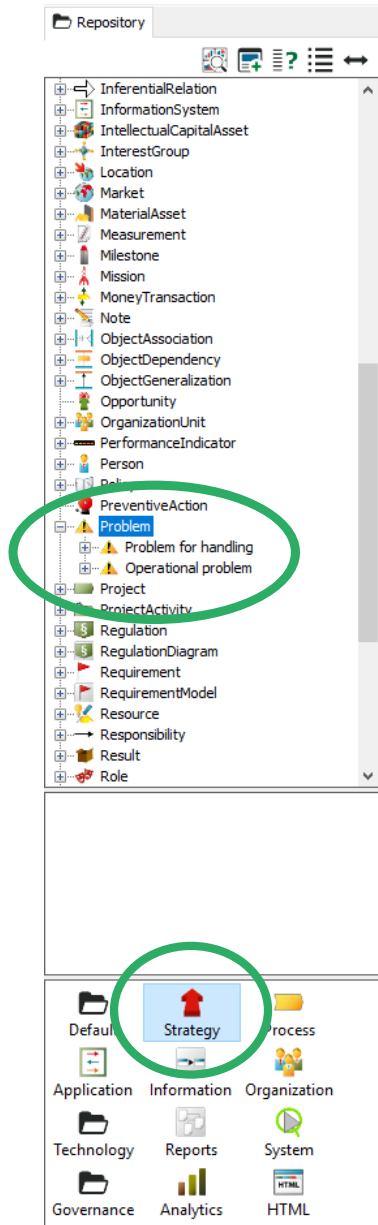
Picture:

Associated Documents:

INSERT REMOVE

OK

# Problem in QLM



Repository

- InferentialRelation
- InformationSystem
- IntellectualCapitalAsset
- InterestGroup
- Location
- Market
- MaterialAsset
- Measurement
- Milestone
- Mission
- MoneyTransaction
- Note
- ObjectAssociation
- ObjectDependency
- ObjectGeneralization
- Opportunity
- OrganizationUnit
- PerformanceIndicator
- Person
- PreventiveAction
- Problem**
  - Problem for handling
  - Operational problem
- Project
- ProjectActivity
- Regulation
- RegulationDiagram
- Requirement
- RequirementModel
- Resource
- Responsibility
- Result
- Role

Default Strategy process

Application Information Organization

Technology Reports System

Governance Analytics HTML

qw Problem : Problem for handling : Rev. 0 : Default

**Problem**

- Audits
- Recommend
- Actual
- Breaks Down To
- Describe
- Associate
- Governance

Short Description:

Priority: 4. Low

Originated By:

Name	Rev.	Type	Mo
Edward Hansen	0	Person	20

Originated Date: 2017 Feb 21

Status:

Responsible: Edward Hansen [Person]

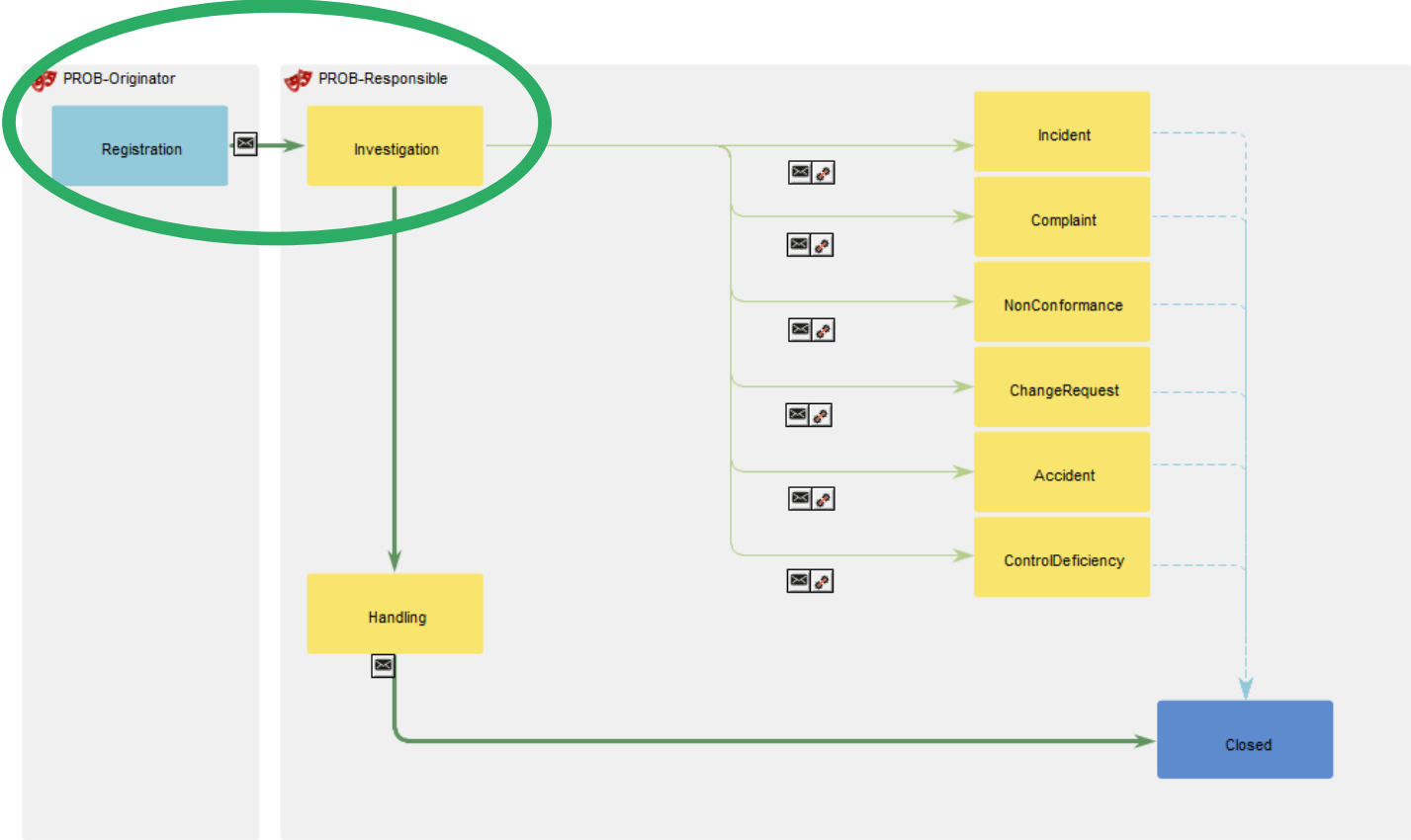
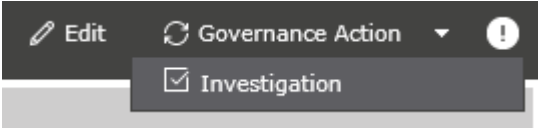
Seq. ID.: PROB-0001

OK Cancel Apply



# Problem - Investigation

- Originator or Responsible can move to Investigation



# Problem - Handling

**Problem**  
**Handling**

Recommended actions

Recommended By: [?]

Recommended Date: [?]

Estimated Resource Requirement: [?]

Recommended Solution: [?]

Actual actions

Executed By: [?]

Start Date: [?]

End Date: [?]

Resources spent: [?]

Corrective Action taken: [?]

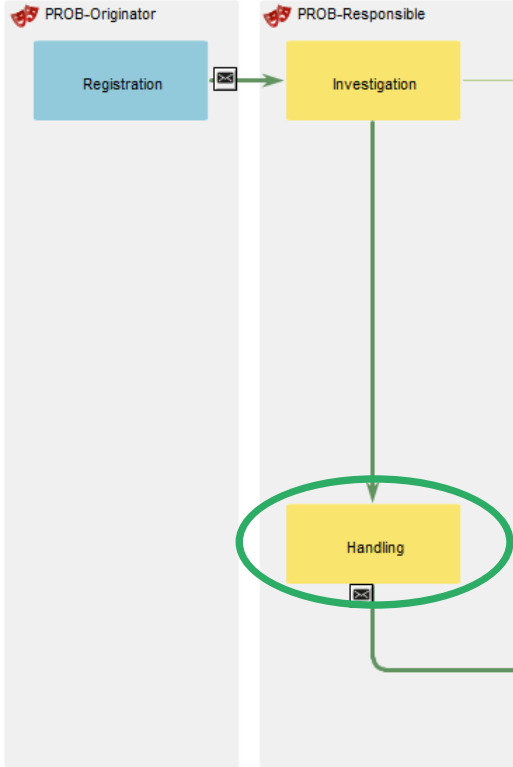
OK Cancel Apply

← Solution

← Implementation

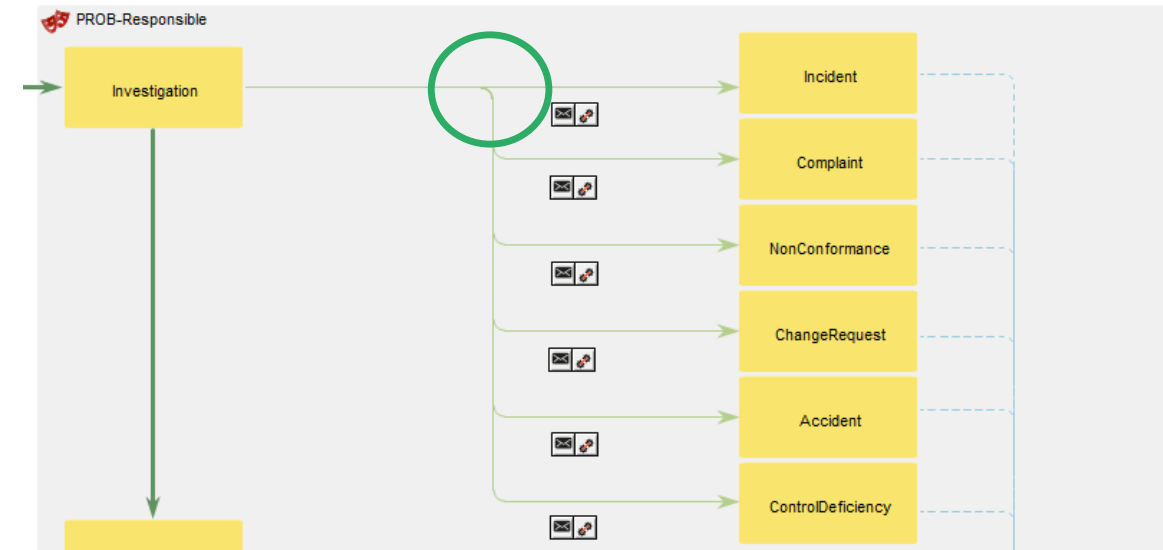
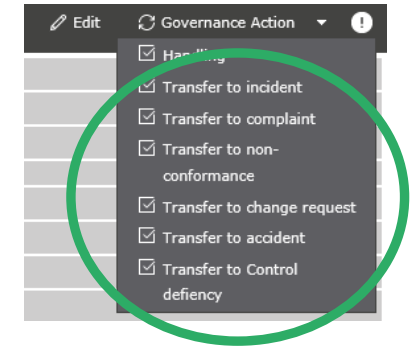
Edit Governance Action [!]

- Handling
- Transfer to incident
- Transfer to complaint
- Transfer to non-conformance
- Transfer to change request
- Transfer to accident
- Transfer to Control deficiency



# Problem - Transfer

- Responsible can transfer to:
  - Incident
  - Complaint
  - NonConformance
  - ChangeRequest
  - Accident
  - ControlDeficiency





Demo – Problem Management

# Exercise 11 – Problem Management



Purpose: Understand how to document and manage a problem.

**Problem**  
Name:

**Handling**  
Description:  
Paragraph St... **B** **I** **U** **A** **☰** **☷** **☱** **☲** **☳** **☴** **☵** **☶** **☷** **☸** **☹** **☺**

Picture:  
Paragraph St... **B** **I** **U** **A** **☰** **☷** **☱** **☲** **☳** **☴** **☵** **☶** **☷** **☸** **☹** **☺**

**Associated Documents:**  
Insert Remove Attach Edit **↑** **↓**

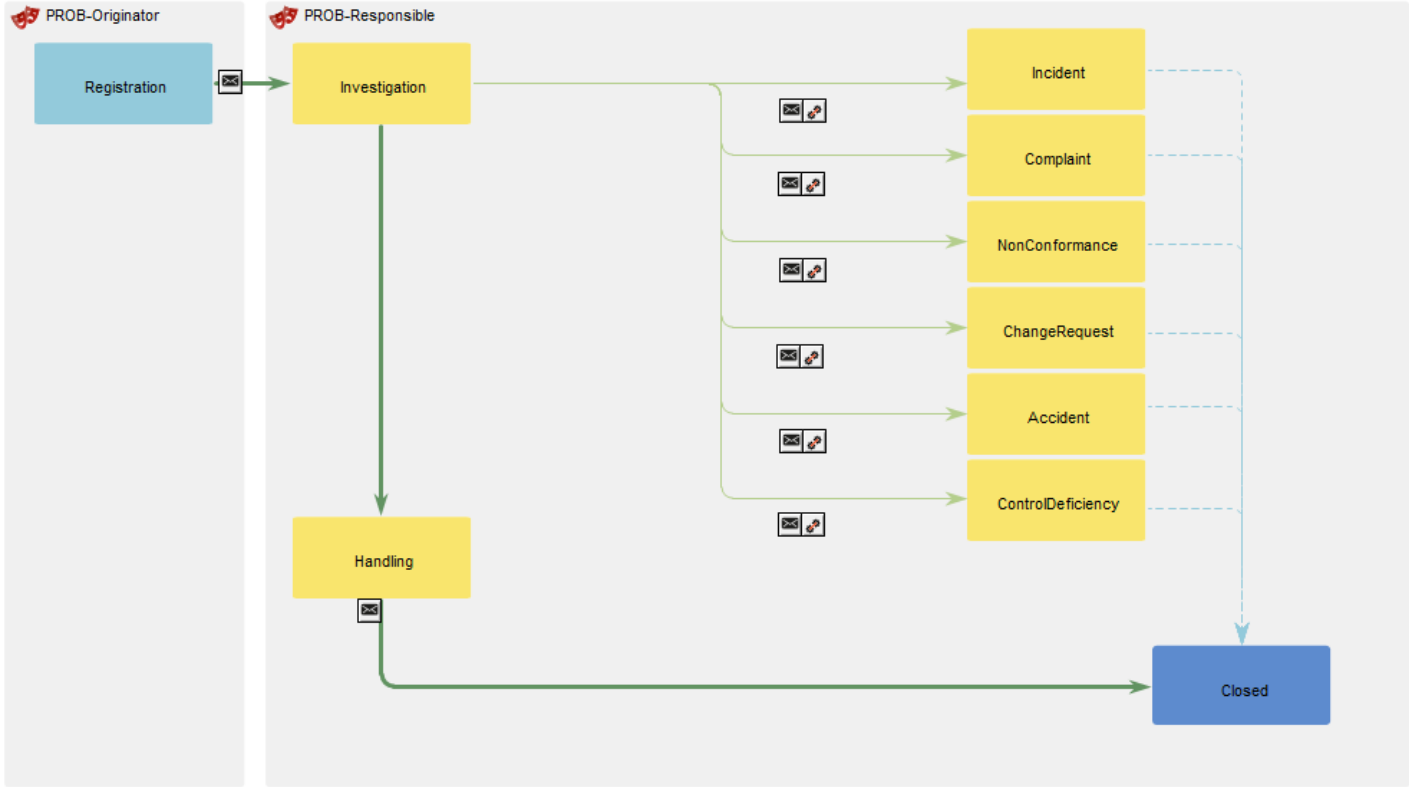
Name	Last modified	By
No records to display.		

Page: 1 of 1 Go Page size: 20 Change Item 0 to 0 of 0

Priority:

Responsible:

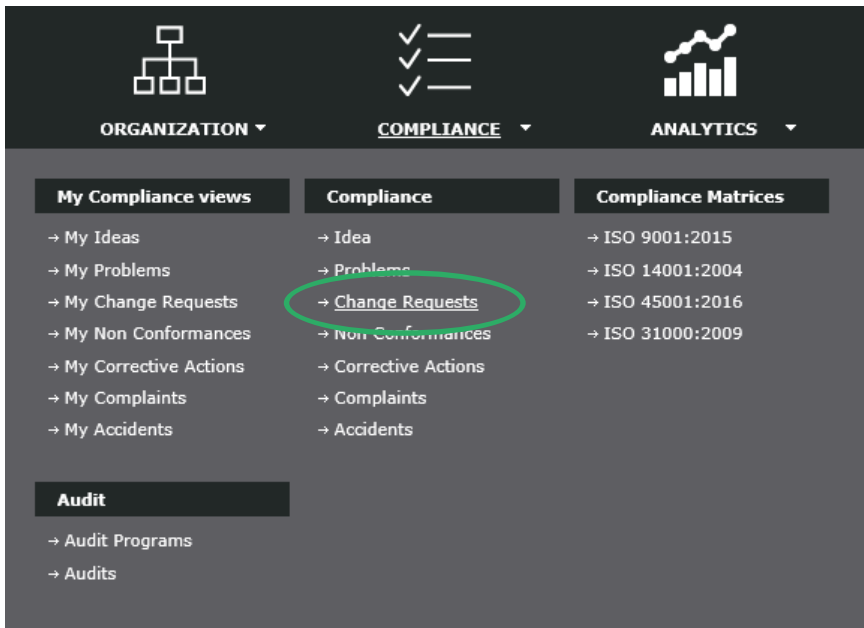
OK Cancel Apply



# Change Requests Management

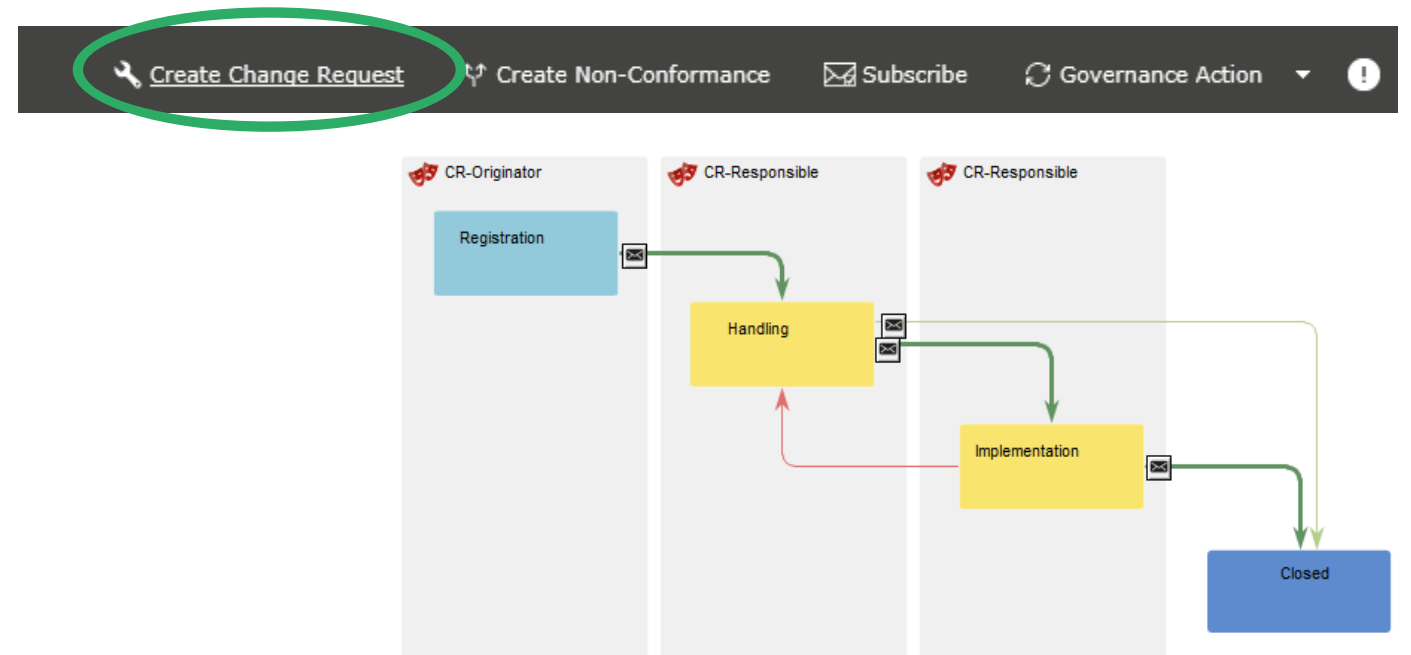
# ChangeRequest

- “ChangeRequest” is a repository object – functions like a ticket
- Typically submitted on the web or via the app
- Pertains to a diagram or other piece of documentation



The screenshot shows the Qualiware web interface navigation menu. The menu is organized into three main sections: ORGANIZATION, COMPLIANCE, and ANALYTICS. Under the COMPLIANCE section, there are three sub-sections: My Compliance views, Compliance, and Compliance Matrices. The 'Change Requests' link under the Compliance section is circled in green.

ORGANIZATION	COMPLIANCE	ANALYTICS
<b>My Compliance views</b>	<b>Compliance</b>	<b>Compliance Matrices</b>
→ My Ideas	→ Idea	→ ISO 9001:2015
→ My Problems	→ Problems	→ ISO 14001:2004
→ My Change Requests	→ <b>Change Requests</b>	→ ISO 45001:2016
→ My Non Conformances	→ Non Conformances	→ ISO 31000:2009
→ My Corrective Actions	→ Corrective Actions	
→ My Complaints	→ Complaints	
→ My Accidents	→ Accidents	
<b>Audit</b>		
→ Audit Programs		
→ Audits		



# ChangeRequest - Registration



Registration
Handling
Implementation

Name:

Priority:

\* Responsible:

Short description:

Paragraph St... **B** *I* U **A** [List icons]

Description:

Description:

Concerns:

Create Edit Insert Remove [Icons]

Name	Template
No records to display.	

Associated Documents:

Insert Remove Attach Edit [Icons]

Name	Last modified	By
No records to display.		

Page: 1 of 1 Go Page size: 20 Change Item 0 to 0 of 0

OK Cancel Apply

← Create Change Request

Registration Handling Implementation Other

Name:

Priority: 1. Critical

Responsible:

ShortDescription:

Description:

Associated Documents:

INSERT REMOVE

OK



# ChangeRequest in QLM



Repository

- Capability
- Category
- Certificate
- ChangeRequest**
- Need for external documents
- New ChangeRequest
- Templates needed
- This diagram needs changes
- Competence
- Competitive Advantage
- Connection
- Corrective Action
- Cost Driver
- Criterion
- Criterion Influence
- Critical Success Factor
- Database
- Decision Model
- Definition
- Document
- Education
- Education Plan
- External Document
- External Entity
- General Concept
- Goal
- Inferential Relation
- Information System
- Intellectual Capital Asset
- Interest Group
- Location
- Market
- Material Asset
- Measurement

Default Strategy Process

Application Information Organization

Technology Reports System

Governance Analytics HTML

ChangeRequest : This diagram needs changes : Rev. 0 : Default

**ChangeRequest**

- Audits
- Concerns
- Recommend
- Actual
- Breaks Down To
- Describe
- Associate
- Governance

Short Description:

Priority: 4. Low

Originated By:

Name	Rev.	Type
Edward Hansen	0	Person

Originated Date: 2017 Feb 21

Status: Registration

Responsible: Edward Hansen [Person]

Seq. ID.: CR-0015

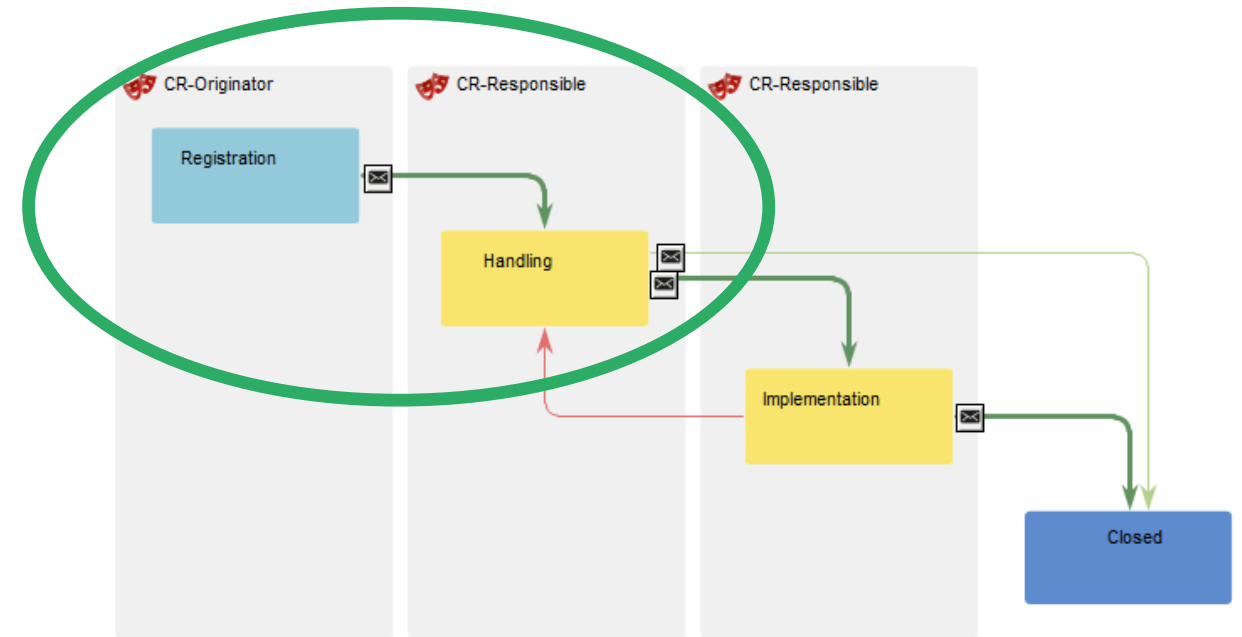
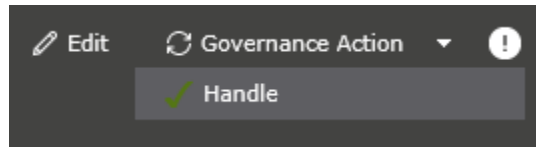
OK Cancel Apply

JTL Processes

- Duncan Savarer
- Edward Hansen
- Re-do Walk-through**
- Jan Müller
- Jacob Lund
- Henrik Winther-Jørgensen
- Fredrik Hatlestad
- Usman Ali Munawar
- Kuno Brodersen

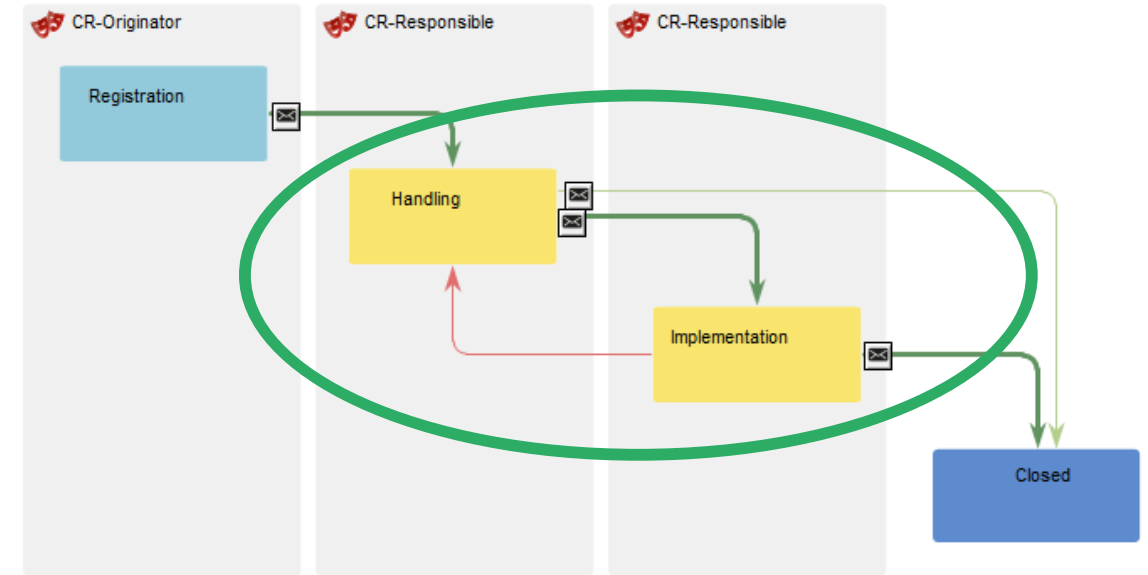
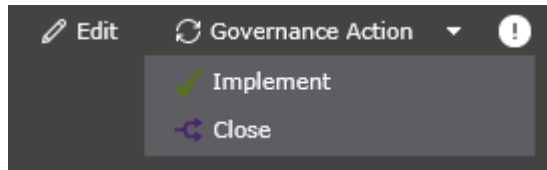
# ChangeRequest - Handling

- Originator must move the ChangeRequest to Handling



# ChangeRequest - Implementation

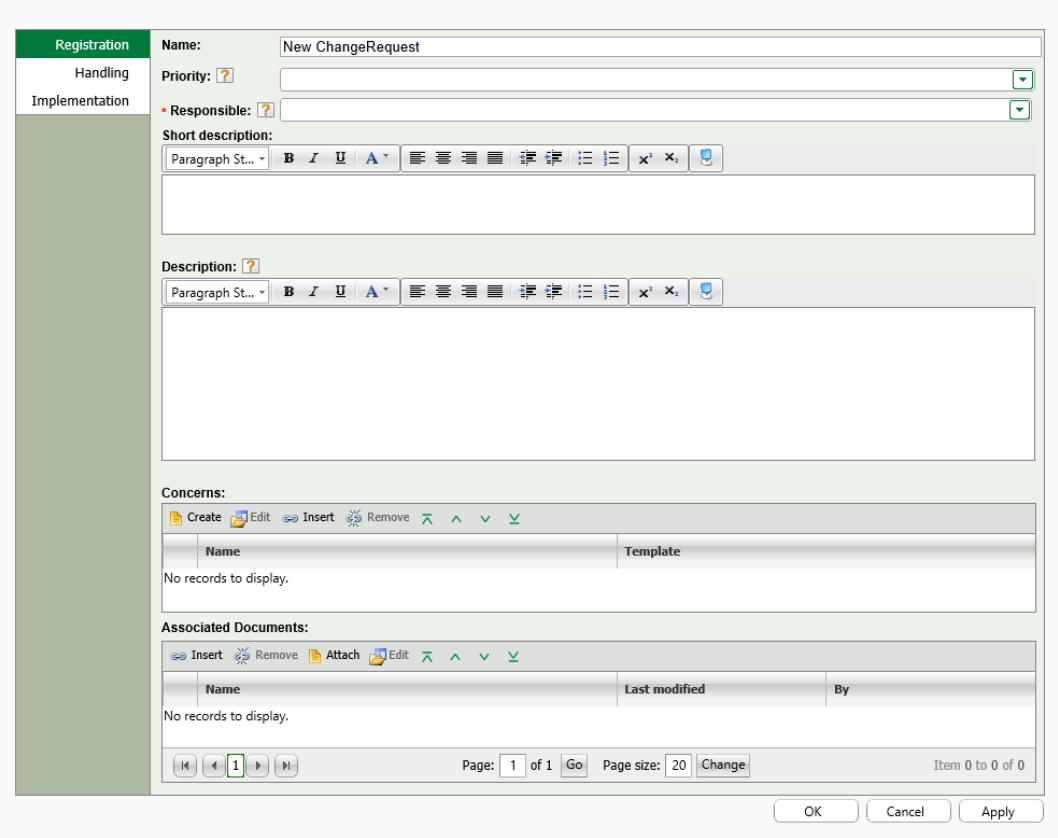
- Responsible can move to Implementation and eventually close



# Demo – Change Requests

# Exercise 13 – Change Requests and Nonconformities

**Purpose:** Understand how to document and manage change requests



Registration  
Handling  
Implementation

Name: New ChangeRequest

Priority: ?

Responsible: ?

Short description:

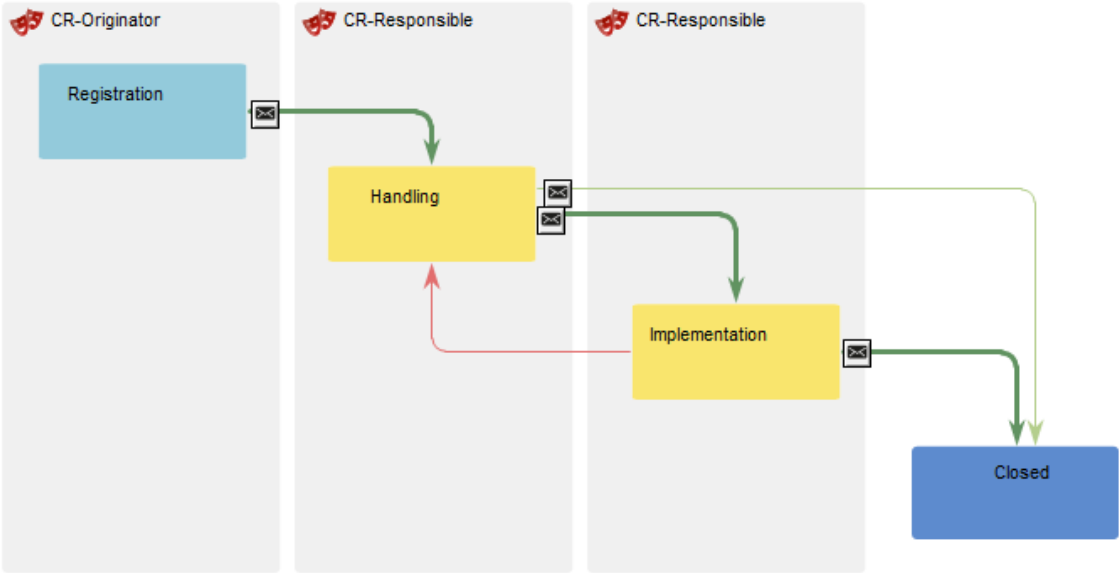
Description: ?

Concerns:

Associated Documents:

Page: 1 of 1 | Page size: 20 | Item 0 to 0 of 0

OK Cancel Apply

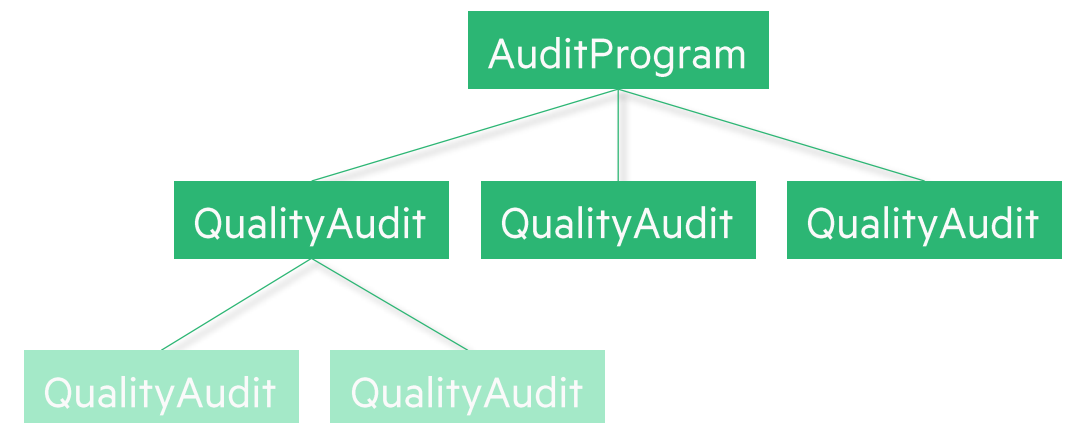
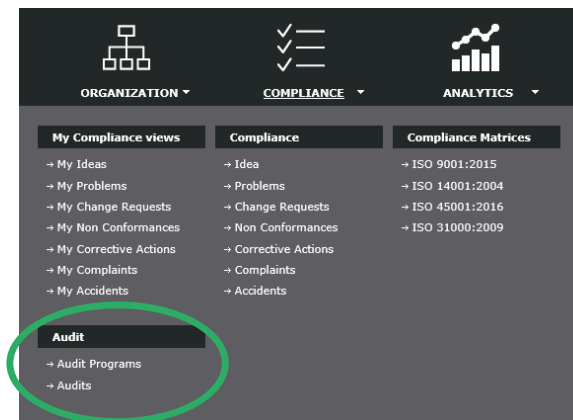




# Audit Programs and Audits

# Audit Program and Audits

- “AuditProgram” is a repository object
- An AuditProgram will contain one or more Audits
- Audits are represented by “QualityAudit” in the repository
- AuditProgram and QualityAudits should be used to track:
  - Everything audit related
  - Questions
  - Findings
  - Implementation
  - Verification



# Audit Program - Planning



**Name:**

**Short Description:**

Paragraph St... **B** *I* U **A** [List icons] [Link icon]

**Audits:**

Create Edit Insert Remove [Up] [Down]

Name	Template
No records to display.	

**Program Owner:**

**Start Date:**  [Calendar] [Clock]

**End Date:**  [Calendar] [Clock]

OK Cancel Apply

← Name

← Short Description

← Contains Audits

← Owner and dates



# Audit - Planning



**Preparation**

Subject  
Findings  
Verification  
Associated documents

Name:

Short Description:  
 **B** *I* U **A** [List icons] [Zoom icons]

Lead Auditor:  [Dropdown] [Refresh] [Help]

Auditor:  [Dropdown] [Refresh] [Help]

Name	Template
No records to display.	

Auditee:  [Dropdown] [Refresh] [Help]

Name	Template
No records to display.	

Audit Date:  [Calendar] [Clock] Audit Type:  [Dropdown]

Originator:  [Dropdown] [Refresh] [Help] Audit Category:  [Dropdown]

Breaks down to:  [Dropdown] [Refresh] [Help]

Name	Template
No records to display.	



Name



Short Description



Lead Auditor and Other Auditors



Auditee



Audit Date, Type and Category



Sub-audits

OK Cancel Apply

# Audit - Planning



Preparation

**Subject**

Findings

Verification

Associated documents

**Target Object: ?**

Create Edit Insert Remove ↑ ↓

Name	Template
No records to display.	

**Target Regulation: ?**

Create Edit Insert Remove ↑ ↓

Name	Template
No records to display.	

**Questions: ?**

Normal Font Name 16px B I U A ↻

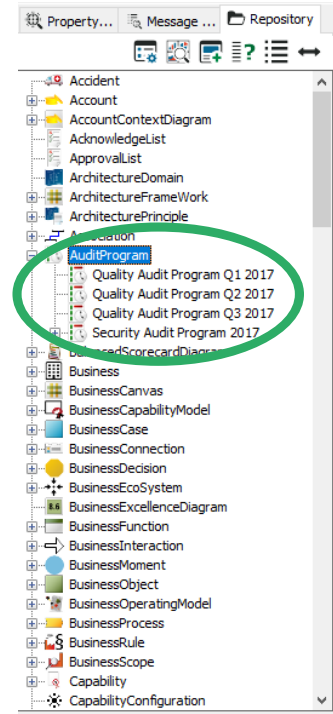
abe x² x₁

← Target BusinessProcess, WorkFlowDiagram or Activity

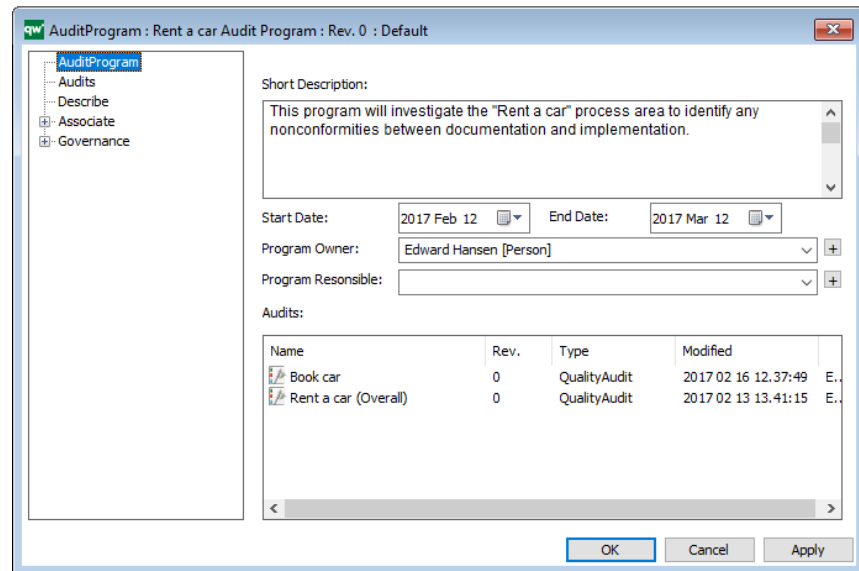
← Target Regulation

← Auditor Questions

# Audit Program and Audit in QLM



- Accident
- Account
- AccountContextDiagram
- AcknowledgeList
- ApprovalList
- ArchitectureDomain
- ArchitectureFrameWork
- ArchitecturePrinciple
- Association
- AuditProgram**
- Quality Audit Program Q1 2017
- Quality Audit Program Q2 2017
- Quality Audit Program Q3 2017
- Security Audit Program 2017
- BusinessScorecardDiagram
- Business
- BusinessCanvas
- BusinessCapabilityModel
- BusinessCase
- BusinessConnection
- BusinessDecision
- BusinessEcoSystem
- BusinessExcellenceDiagram
- BusinessFunction
- BusinessInteraction
- BusinessMoment
- BusinessObject
- BusinessOperatingModel
- BusinessProcess
- BusinessRule
- BusinessScope
- Capability
- CapabilityConfiguration



AuditProgram : Rent a car Audit Program : Rev. 0 : Default

Short Description:  
This program will investigate the "Rent a car" process area to identify any nonconformities between documentation and implementation.

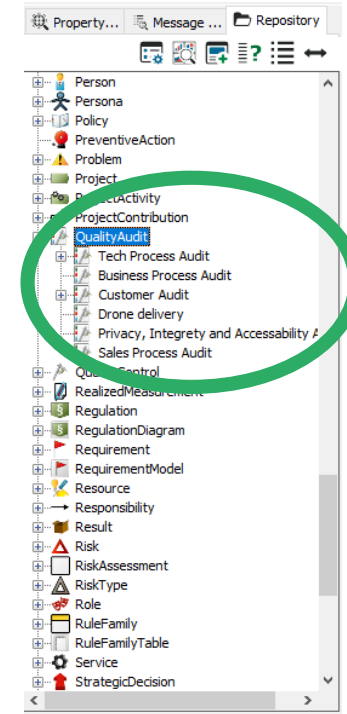
Start Date: 2017 Feb 12 End Date: 2017 Mar 12

Program Owner: Edward Hansen [Person]

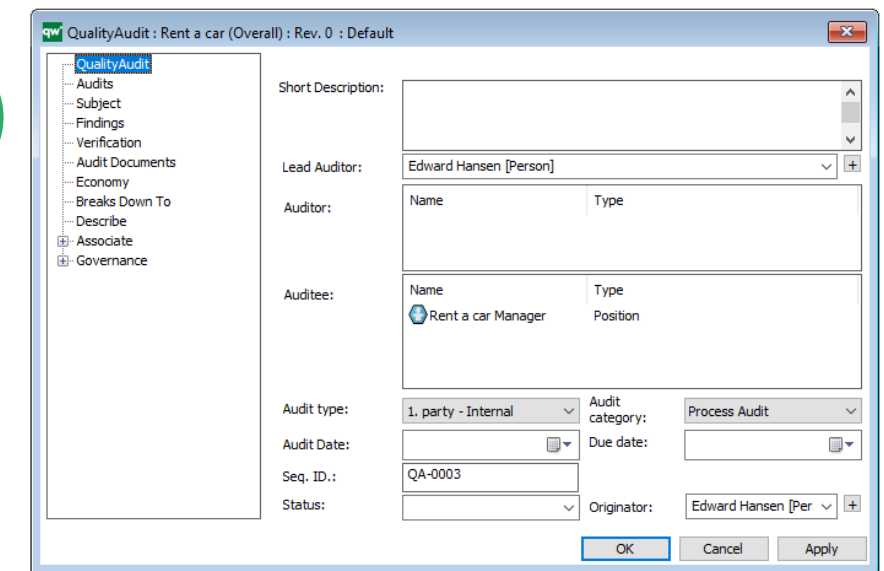
Program Responsible:

Name	Rev.	Type	Modified
Book car	0	QualityAudit	2017 02 16 12.37:49 E..
Rent a car (Overall)	0	QualityAudit	2017 02 13 13.41:15 E..

OK Cancel Apply



- Person
- Persona
- Policy
- PreventiveAction
- Problem
- Project
- ProjectActivity
- ProjectContribution
- QualityAudit**
- Tech Process Audit
- Business Process Audit
- Customer Audit
- Drone delivery
- Privacy, Integrity and Accessibility A
- Sales Process Audit
- QualityControl
- RealizedMeasurement
- Regulation
- RegulationDiagram
- Requirement
- RequirementModel
- Resource
- Responsibility
- Result
- Risk
- RiskAssessment
- RiskType
- Role
- RuleFamily
- RuleFamilyTable
- Service
- StrategicDecision



QualityAudit : Rent a car (Overall) : Rev. 0 : Default

Short Description:

Lead Auditor: Edward Hansen [Person]

Auditor:

Name	Type
Rent a car Manager	Position

Auditee:

Name	Type
Rent a car Manager	Position

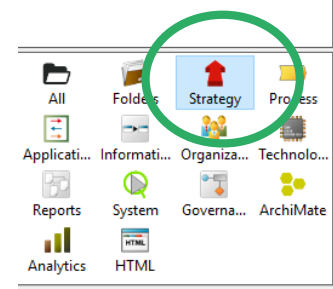
Audit type: 1. party - Internal Audit category: Process Audit

Audit Date: Due date:

Seq. ID.: QA-0003

Status: Originator: Edward Hansen [Per]

OK Cancel Apply

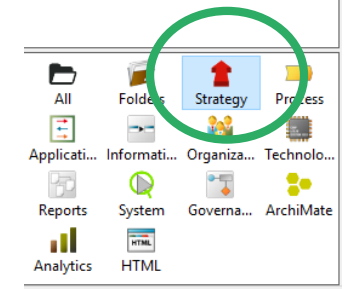


All Folders Strategy Process

Applicati... Informati... Organiza... Technolo...

Reports System Govern... ArchiMate

Analytics HTML



All Folders Strategy Process

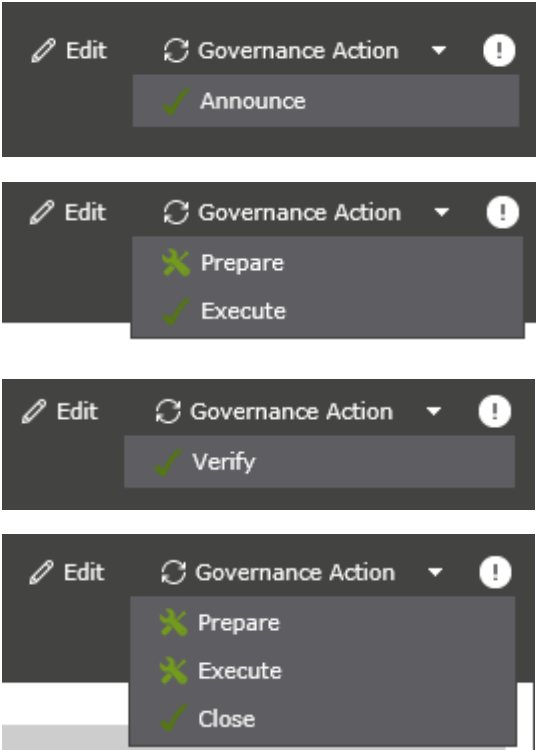
Applicati... Informati... Organiza... Technolo...

Reports System Govern... ArchiMate

Analytics HTML

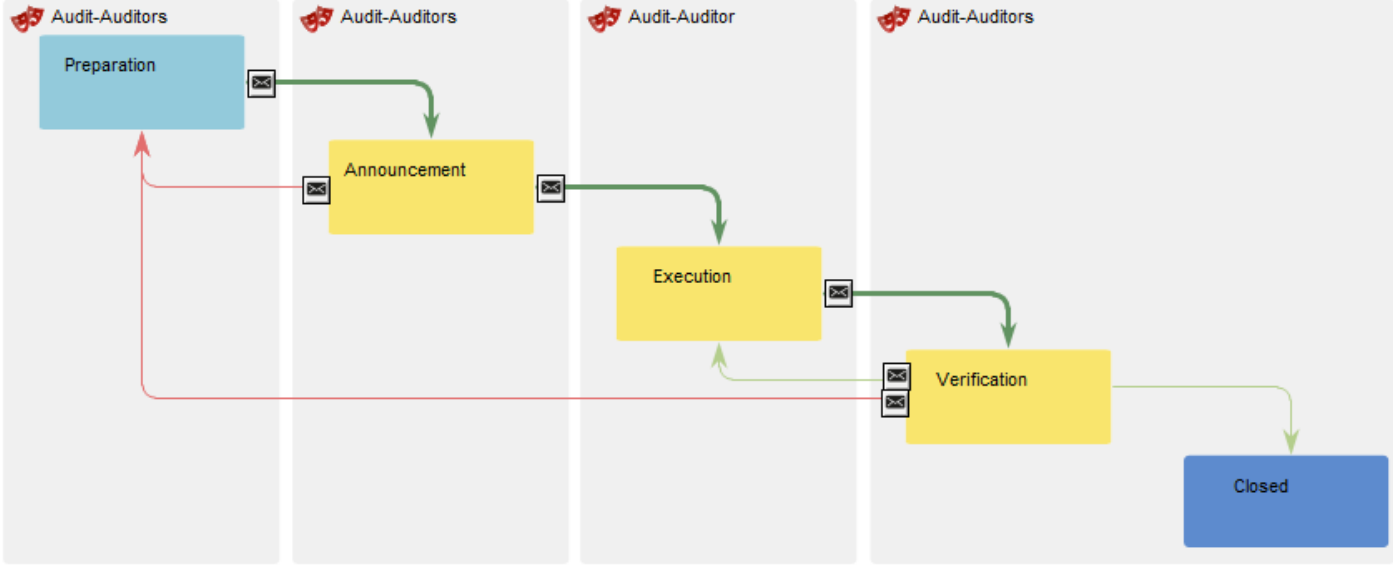
# Audit - Management

- Lead Auditor and Auditors can progress the audit



Four screenshots of a 'Governance Action' dropdown menu, each showing a different action selected:

- Announce (checked)
- Prepare (X), Execute (checked)
- Verify (checked)
- Prepare (X), Execute (X), Close (checked)





# Demo – Audit Programs and Audits

# Exercise 14 – Audit Programs and Audits



Purpose: Understand how to prepare and manage Audit Programs and Audits

**Name:** New AuditProgram

**Short Description:**

**Audits:**

Name	Template
No records to display.	

**Program Owner:**

**Start Date:**

**End Date:**

OK Cancel Apply

**Name:** New QualityAudit

**Short Description:**

**Lead Auditor:** Edvard Hansen [Person]

**Auditor:**

Name	Template
No records to display.	

**Audites:**

Name	Template
No records to display.	

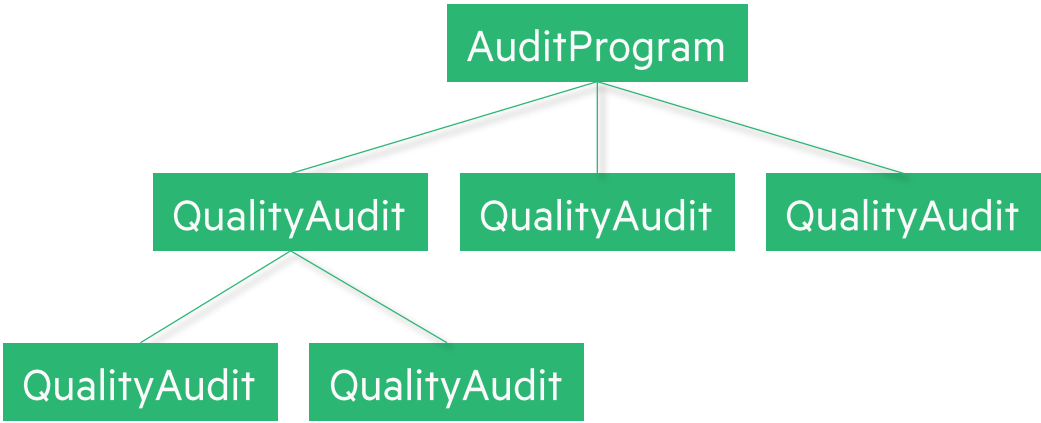
**Audit Date:**      **Audit type:** 1. party - Internal

**Originator:** Edvard Hansen [Person]      **Audit category:** Process Audit

**Breaks down to:**

Name	Template
No records to display.	

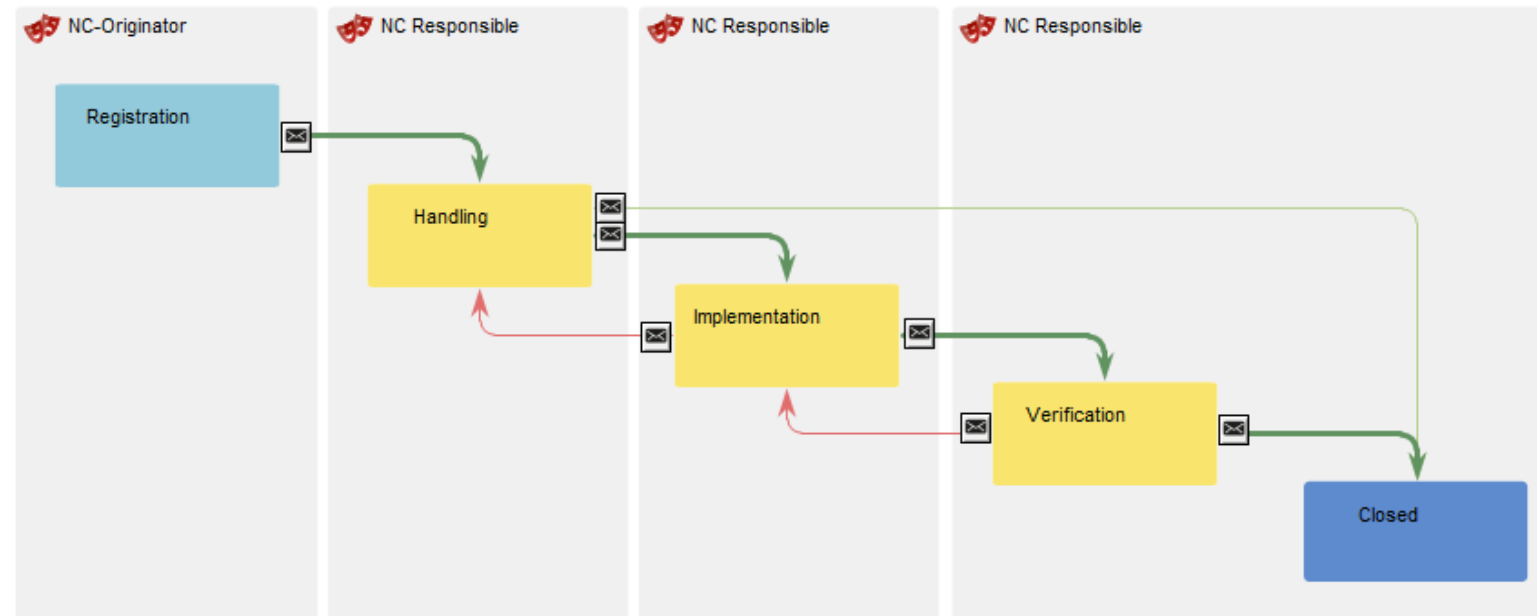
OK Cancel Apply



# Nonconformances

# Nonconformances

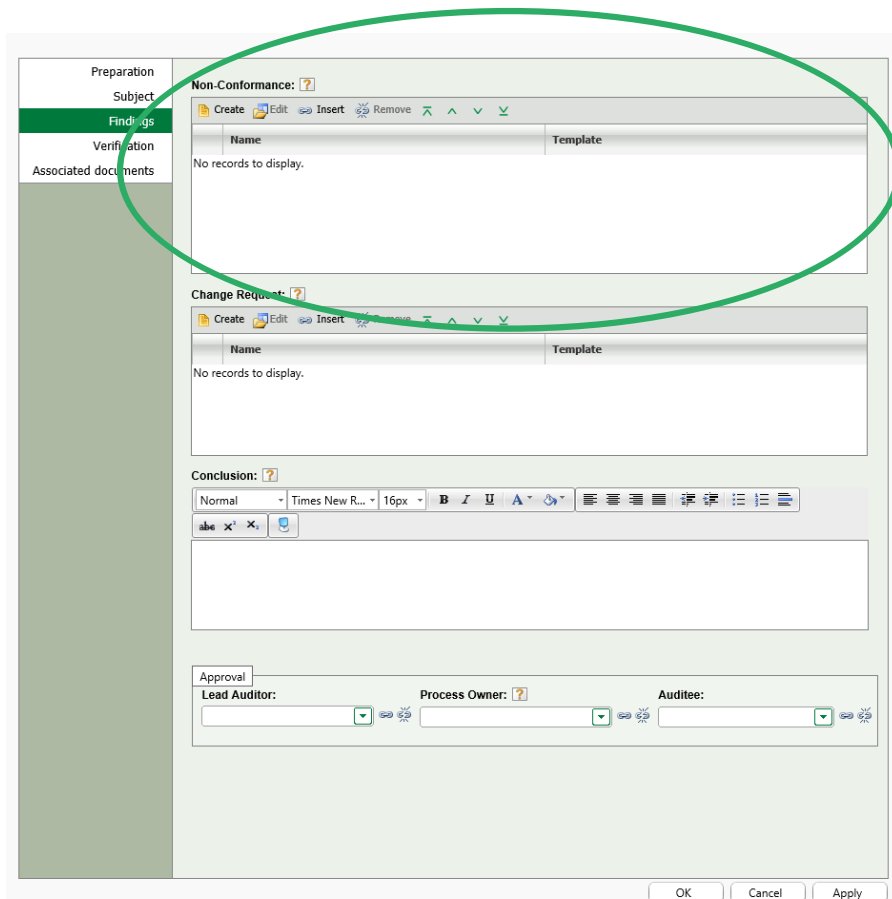
- “NonConformance” is a repository object – functions like a ticket
- Typically submitted on the web
  - Documented in Audits
  - Submitted from Diagrams





# Nonconformances

- Finding in Audit
- Created from QRV



Preparation  
Subject  
**Findings**  
Verification  
Associated documents

Non-Conformance: ?

Create Edit Insert Remove ↕ ^ v

Name	Template
No records to display.	

Change Request: ?

Create Edit Insert Remove ↕ ^ v

Name	Template
No records to display.	

Conclusion: ?

Normal Times New R... 16px B I U A ↺ ↻

Approval

Lead Auditor: Process Owner: ? Auditee:

OK Cancel Apply



ORGANIZATION ▾ COMPLIANCE ▾ ANALYTICS ▾

My Compliance views	Compliance	Compliance Matrices
→ My Ideas	→ Idea	→ ISO 9001:2015
→ My Problems	→ Problems	→ ISO 14001:2004
→ My Change Requests	→ Change Requests	→ ISO 45001:2016
→ My Non Conformances	→ <u>Non Conformances</u>	→ ISO 31000:2009
→ My Corrective Actions	→ Corrective Actions	
→ My Complaints	→ Complaints	
→ My Accidents	→ Accidents	

**Audit**

- Audit Programs
- Audits



# Nonconformance Registration



**Registration** | Name:

Handling | Priority:

Implementation | Responsible:

Verification | Observation:

Paragraph St... | **B** | *I* | U | **A** | [List Icons] | [Zoom Icons]

Explanation:

Paragraph St... | **B** | *I* | U | **A** | [List Icons] | [Zoom Icons]

**Associated documents:**

Insert | Remove | Attach | Edit | [Navigation Icons]

Name	Last modified	By
No records to display.		

Page: 1 of 1 | Go | Page size: 20 | Change | Item 0 to 0 of 0

**Against:**

Create | Edit | Insert | Remove | [Navigation Icons]

Name	Template
No records to display.	

OK | Cancel | Apply



Name, Priority and Responsible



Observation



Explanation

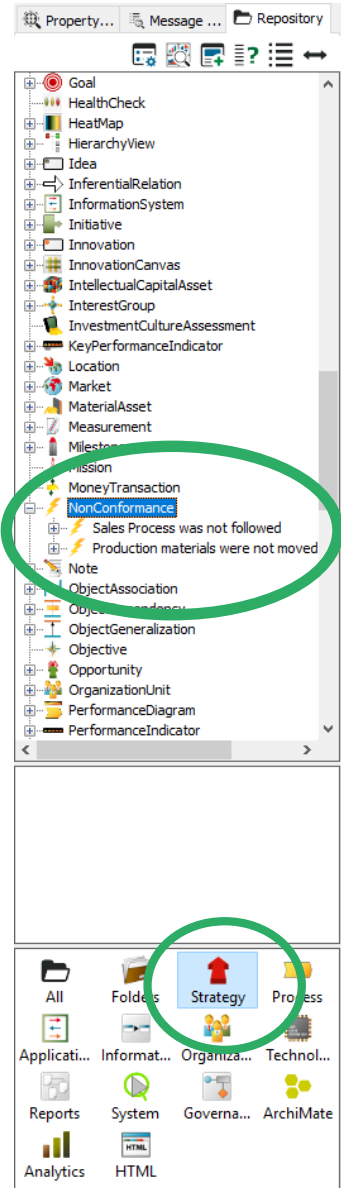


Additional documentation

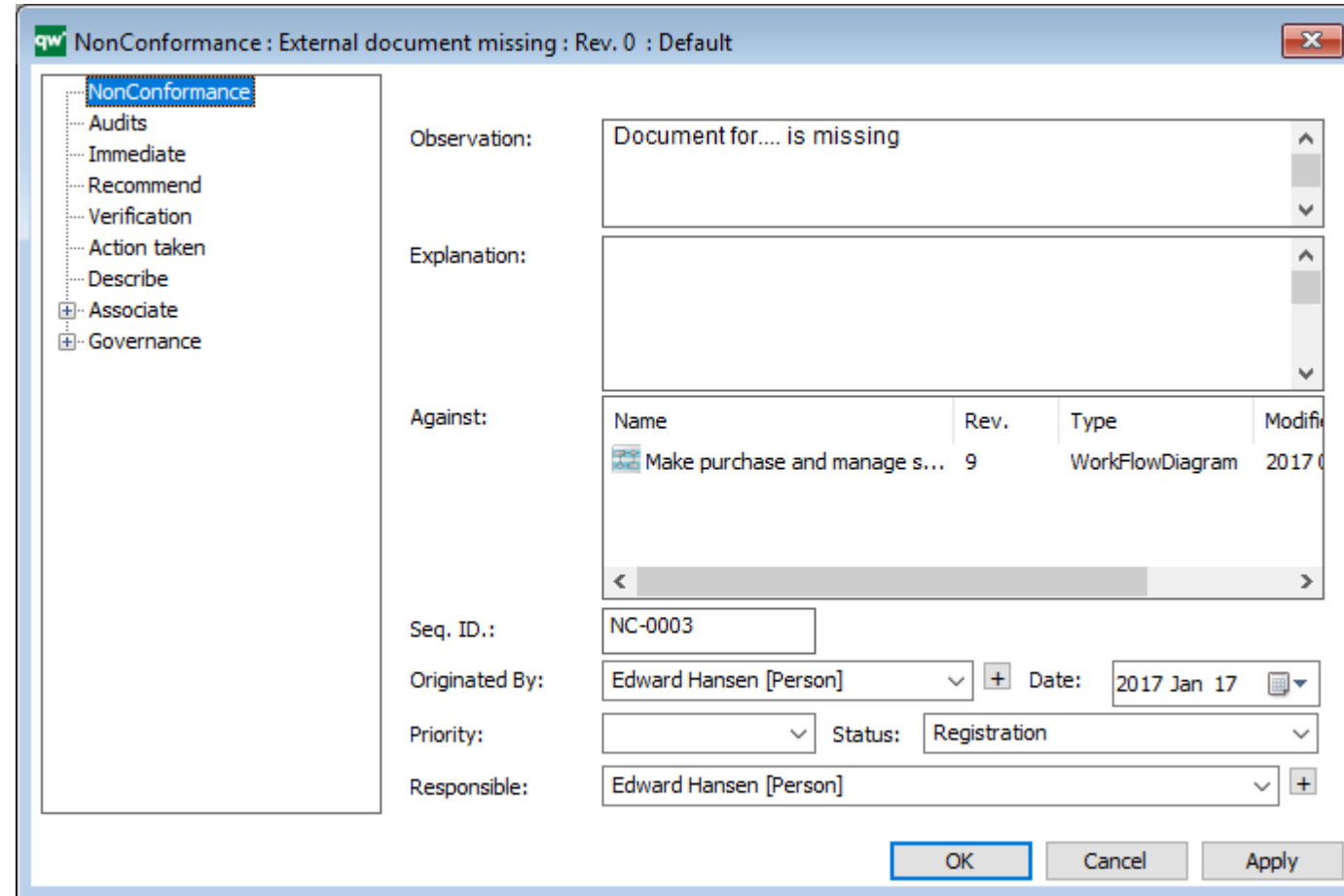


Standards/Procedures not adhered

# Nonconformances in QLM



The screenshot shows the repository tree view in QLM. The 'NonConformance' node is highlighted with a green circle. Below the tree view, the 'Strategy' icon in the bottom toolbar is also highlighted with a green circle.



The screenshot shows the 'NonConformance : External document missing : Rev. 0 : Default' dialog box. The dialog contains the following fields and controls:

- NonConformance** (selected in the tree view)
- Audits** (expanded): Immediate, Recommend, Verification, Action taken, Describe, Associate, Governance
- Observation:** Document for.... is missing
- Explanation:** (empty text area)
- Against:** Table with columns: Name, Rev., Type, Modified

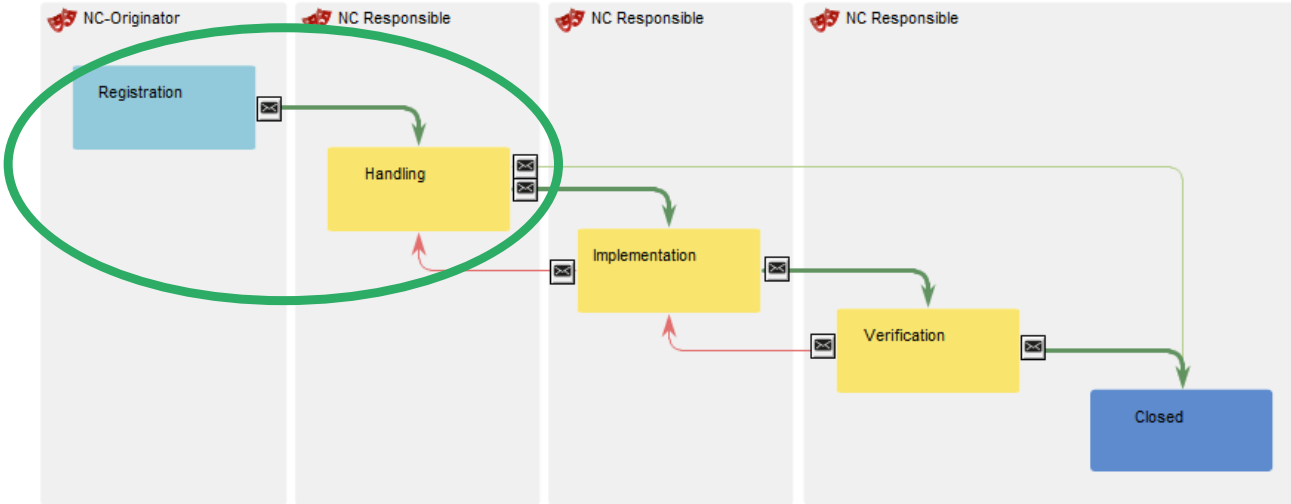
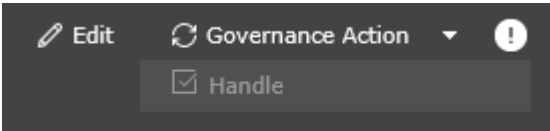
Name	Rev.	Type	Modified
Make purchase and manage s...	9	WorkFlowDiagram	2017 0

- Seq. ID.:** NC-0003
- Originated By:** Edward Hansen [Person] + Date: 2017 Jan 17
- Priority:** (dropdown) Status: Registration
- Responsible:** Edward Hansen [Person] +

Buttons: OK, Cancel, Apply

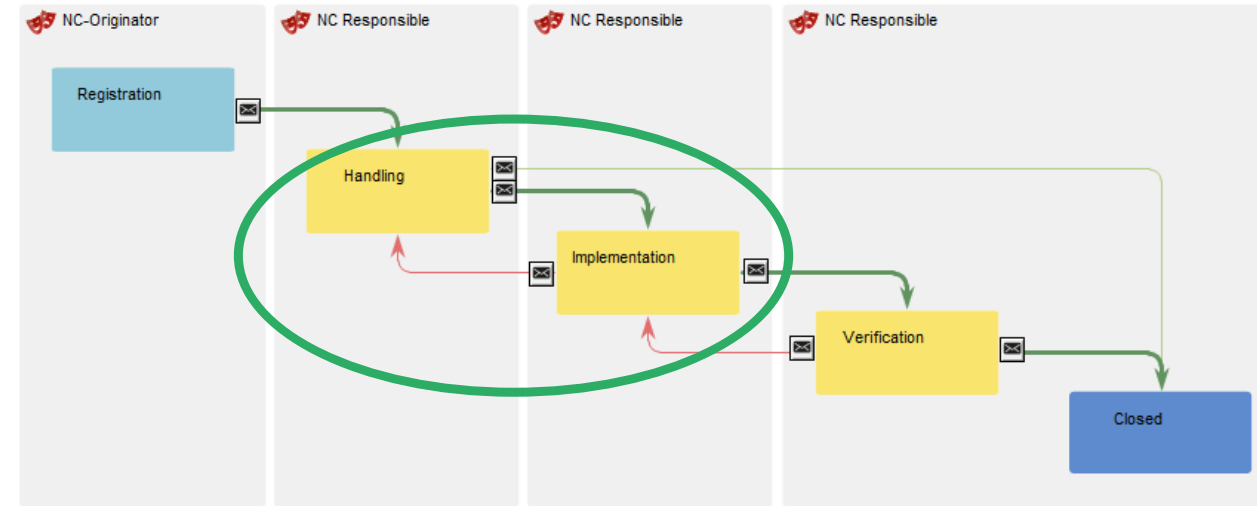
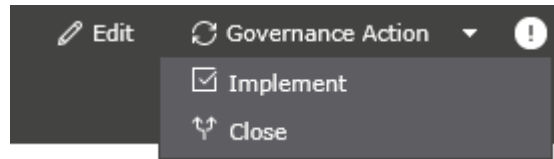
# Nonconformance - Handling

- Originator must move the nonconformance to handling



# Nonconformance – Implementation, Verification and Closure

- Responsible can move to Implementation, verification and eventually close



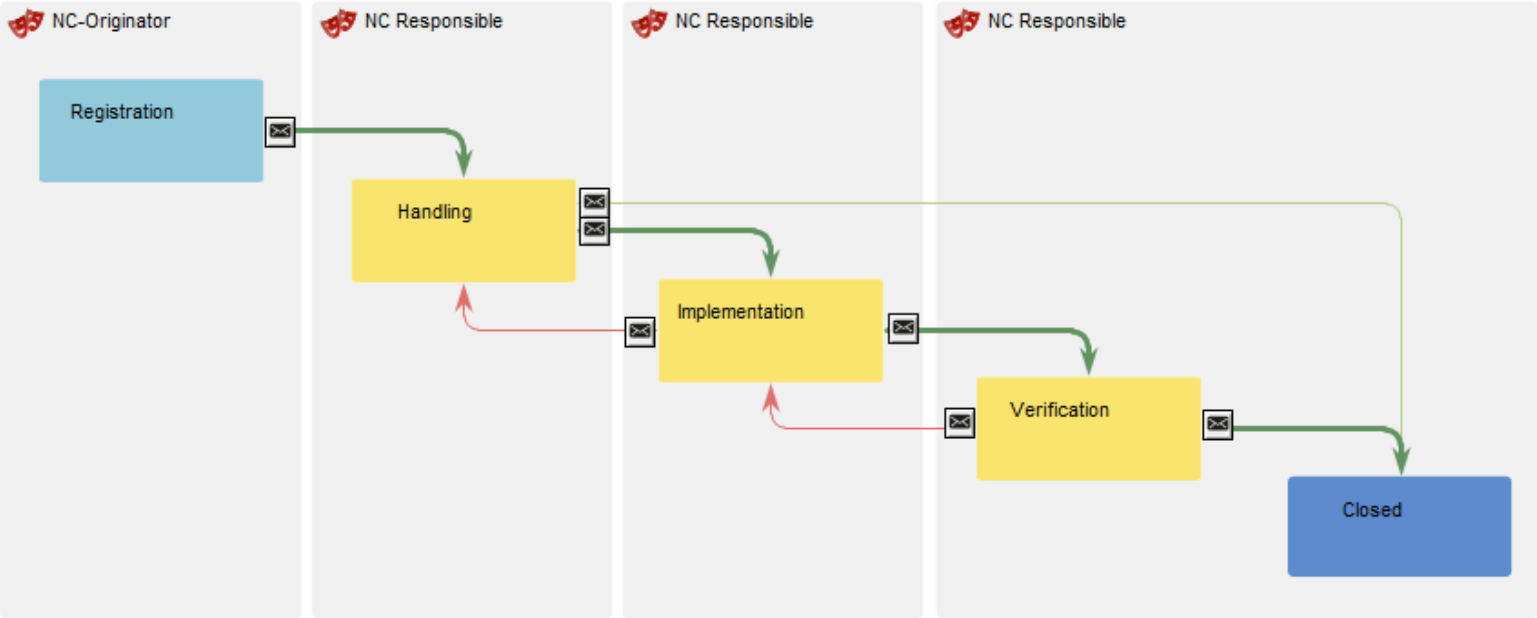
# Demo – Nonconformances

# Exercise 14 – Nonconformances



**Purpose:** Understand how to document and manage Nonconformances

The screenshot shows the 'New NonConformance' registration form. It includes fields for Name, Priority, Responsible, and Observation. Below these are rich text editors for Observation and Explanation. At the bottom, there are sections for 'Associated documents' and 'Against' with table headers for Name, Last modified, and By. The form also includes navigation buttons like OK, Cancel, and Apply.



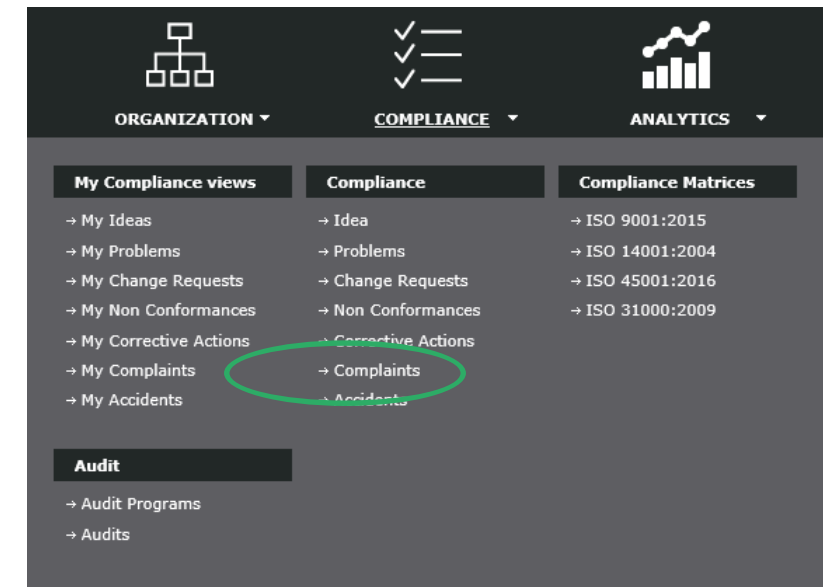
# Complaints





# Complaints on the web

- Complaint repository object – functions like ticket objects
- Typically submitted from the web
- Requires a customer (BusinessConnection) object



Name	Sequence ID	Responsible	Creation date	Short description	Status
Car was never delivered	COM-0002	Edward Hansen	2017 02 22		Handling
Car was the wrong color	COM-0001	Edward Hansen	2017 02 22		Registration

# Complaint



**Registration** | Name:

Details | Description:   
Paragraph St... **B** *I* U **A**   
[Rich text editor toolbar]

File number:  File registration date:  [Calendar] [Clock]

Received date:  [Calendar] [Clock]

Complaint type:  [Dropdown]

Priority:  [Dropdown]

Responsibility   
\* Responsible:  [Dropdown] [Reset] [Refresh]

Read access:   
[Create] [Edit] [Insert] [Remove] [Up] [Down]   
Name | Template   
No records to display.

Read/Write access:   
[Create] [Edit] [Insert] [Remove] [Up] [Down]   
Name | Template   
No records to display.

OK Cancel Apply



Name



Details



Dates, Type and Priority



Responsible



Additional read/write access

# Complaint



Registration

**Details**

Analysis

Handling

Documents

Closing

Second handling

Customer: ?

Customer contact: ?

Customer reference: ?

Product or service

Product or service category:

Related to product or service: ?

Name	Template
No records to display.	

Product or service:

Internal reference 1:

Internal reference 2:

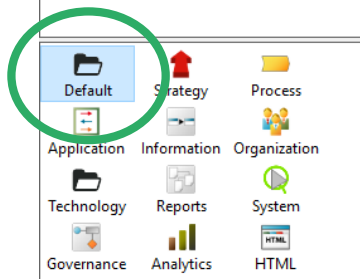
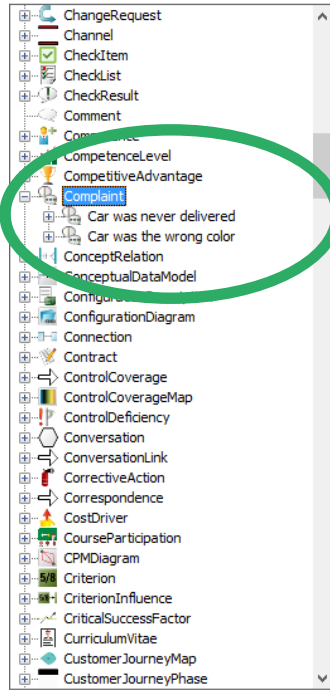
Internal reference 3:

OK Cancel Apply

← Customer information

← Product or service details

# Complaint in QLM



qw Complaint : Car was never delivered : Rev. 0 : Default

Complaint description:

Complaint description text area

File number:  File registration date:

Customer:  +

Customer contact:

Customer reference:

Received date:  Originated date: 2017 Feb 22

Originated by: Edward Hansen [Person] +

Status: Registration

Sequence ID: COM-0002

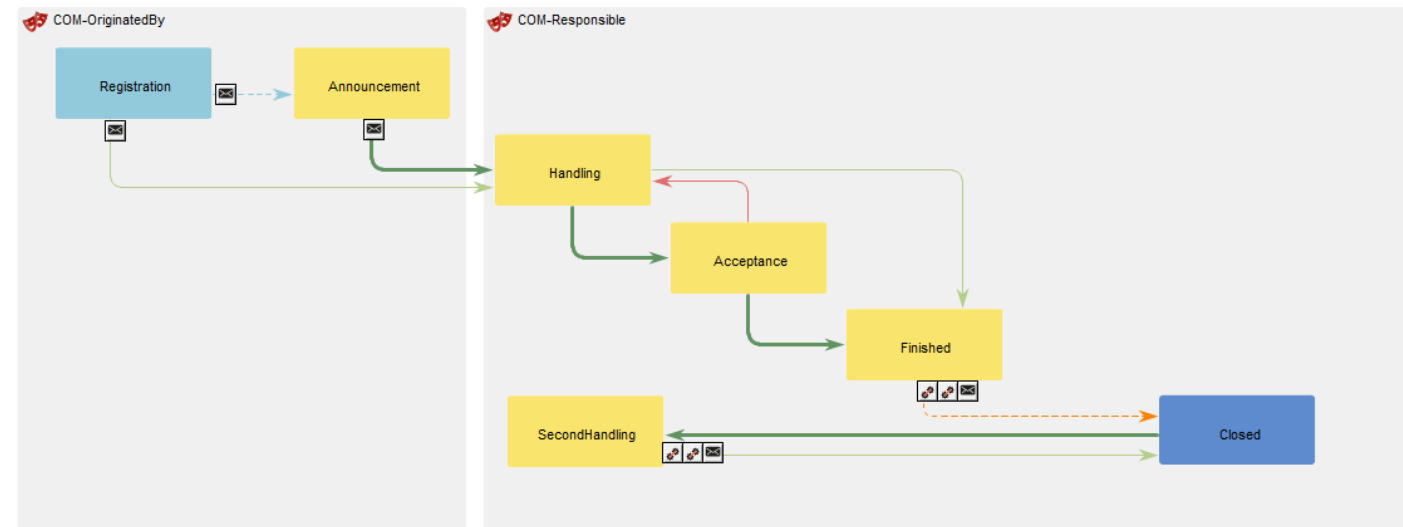
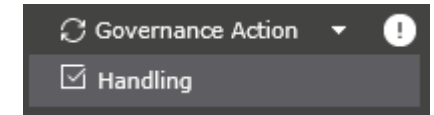
OK Cancel Apply

Complaint navigation menu:

- Complaint
- Audits
- Details
- Priority
- Responsibility
- Immediate response
- Analysis
- Handling
- Final response
- Close
- Second handling
- Describe
- Governance
- Associate

# Complaint handling

- Announcement to customer for receipt of complaint
- Handling – Responsible
- Acceptance – Customer
- Finished – After acceptance
- Closed
- SecondHandling if no acceptance from customer

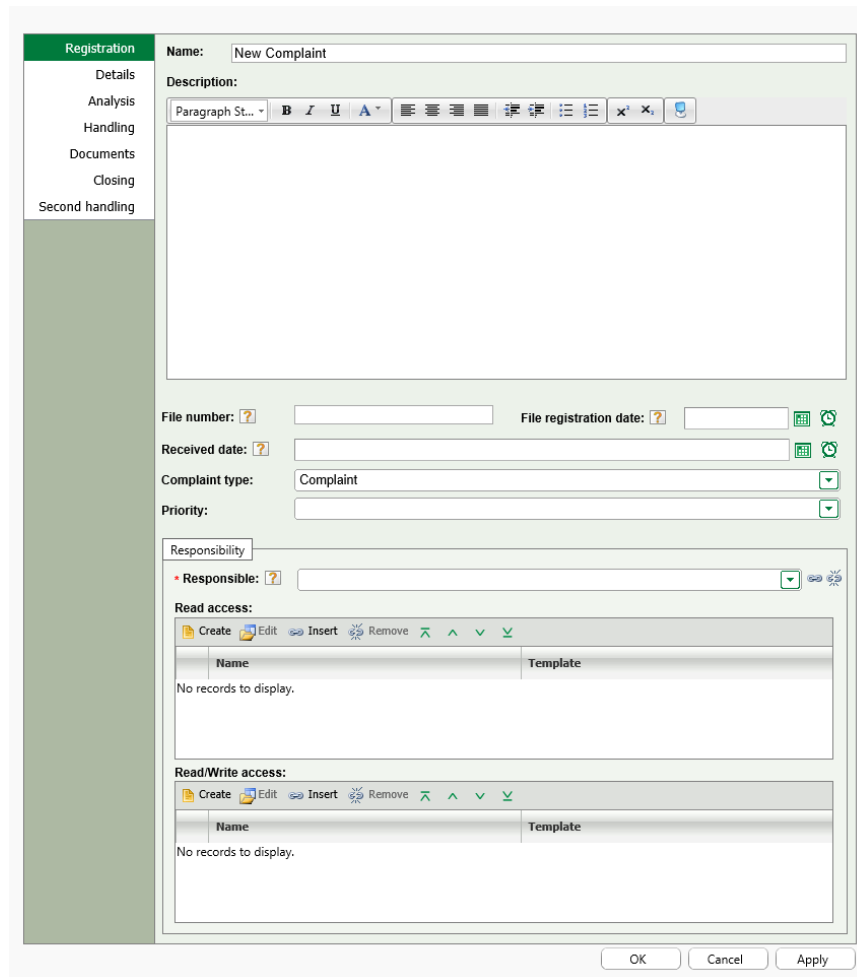




# Demo – Complaints

# Exercise 15 – Complaints

Purpose: Understand how to document and manage a complaint



Registration

Name: New Complaint

Details

Analysis

Handling

Documents

Closing

Second handling

Description:

Paragraph St... B I U A ...

File number: ? [ ] File registration date: ? [ ]

Received date: ? [ ]

Complaint type: Complaint

Priority: [ ]

Responsibility

• Responsible: ? [ ]

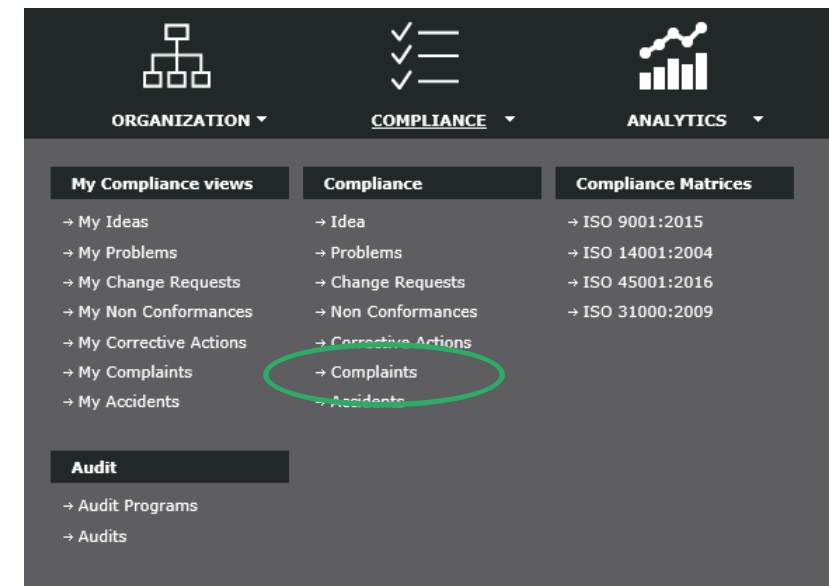
Read access:

Name	Template
No records to display.	

Read/Write access:

Name	Template
No records to display.	

OK Cancel Apply



ORGANIZATION COMPLIANCE ANALYTICS

My Compliance views Compliance Compliance Matrices

- My Ideas
- My Problems
- My Change Requests
- My Non Conformances
- My Corrective Actions
- My Complaints
- My Accidents

→ Idea

→ Problems

→ Change Requests

→ Non Conformances

→ Corrective Actions

→ Complaints

→ Accidents

ISO 9001:2015

ISO 14001:2004

ISO 45001:2016

ISO 31000:2009

Audit

- Audit Programs
- Audits

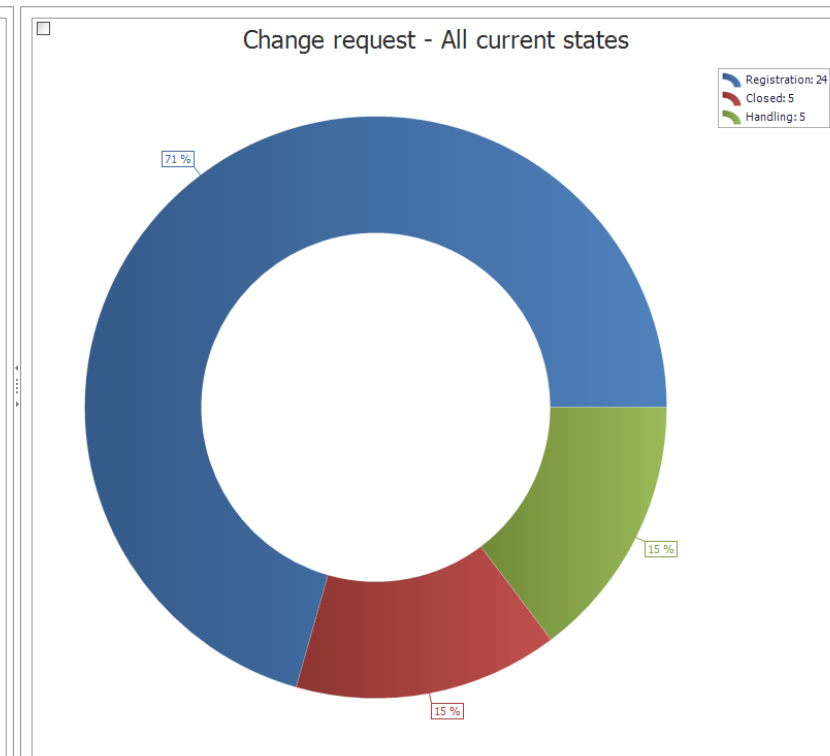
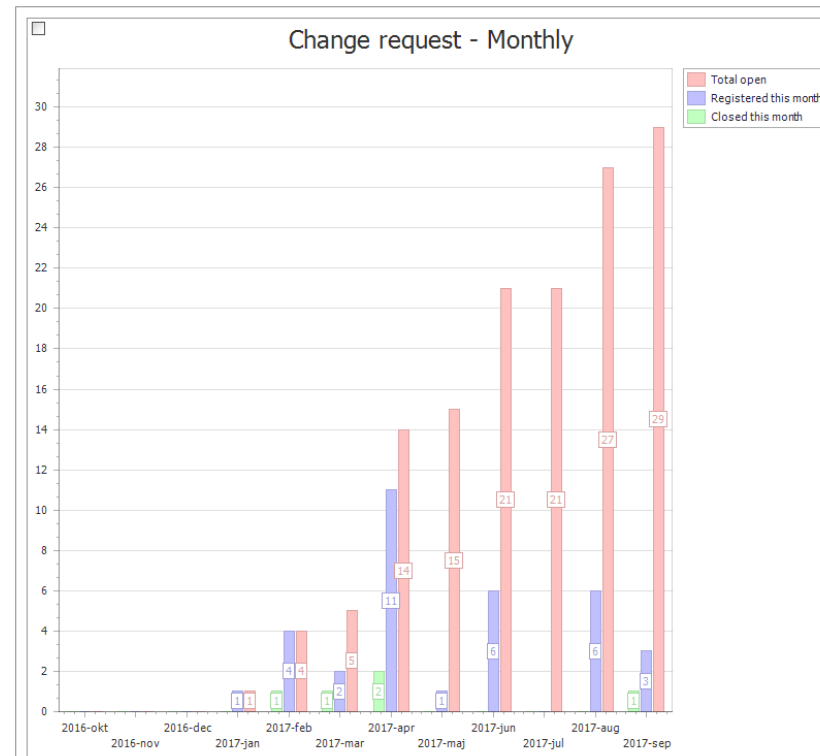
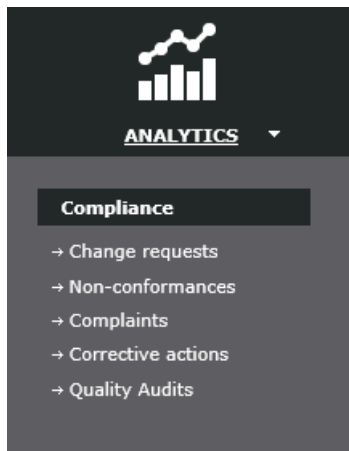


# Analytics



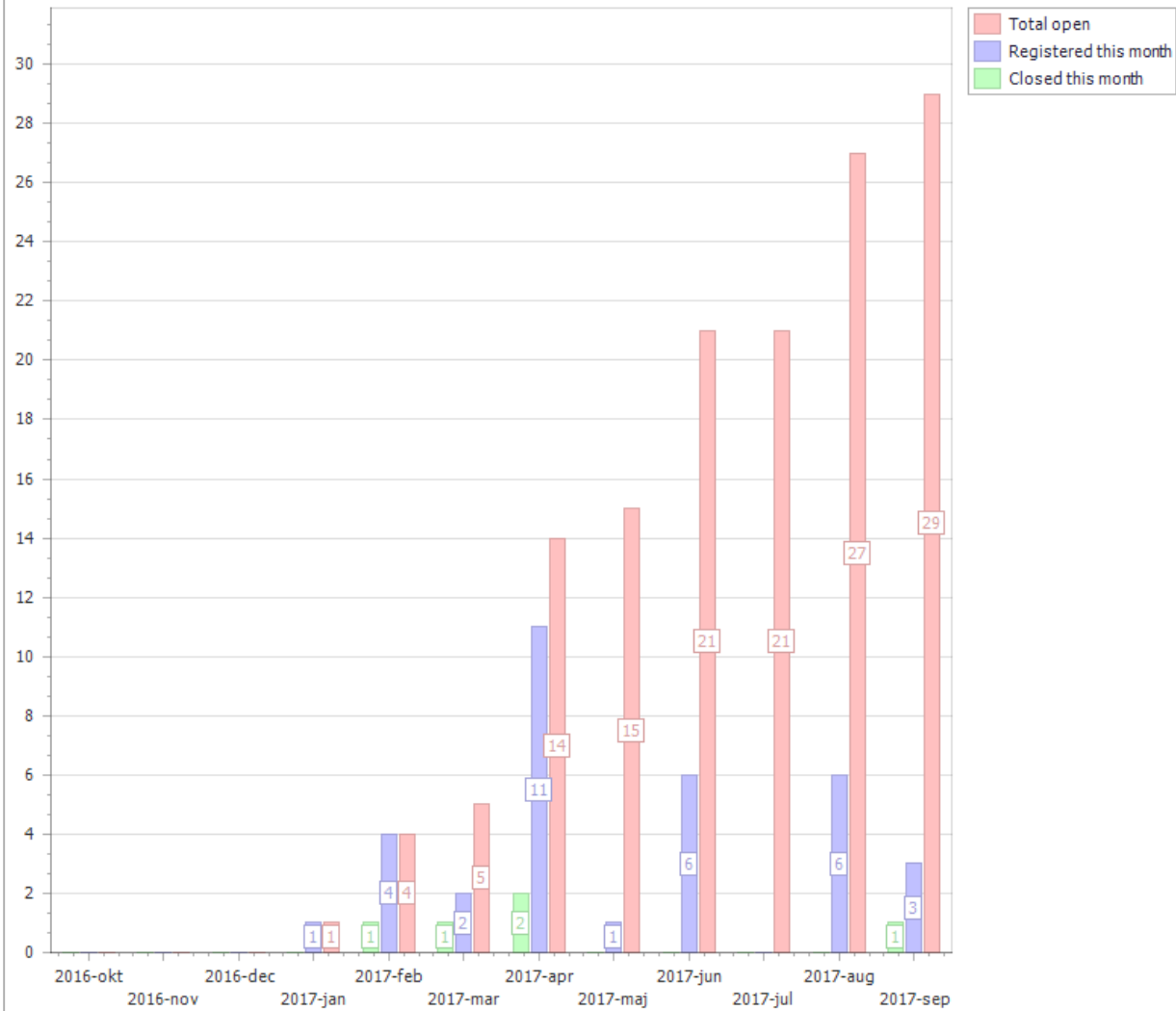
# Analytics

- Key data and statistics on quantities and states:
  - Change Requests
  - Nonconformities
  - Complaints
  - Corrective actions
  - Audits

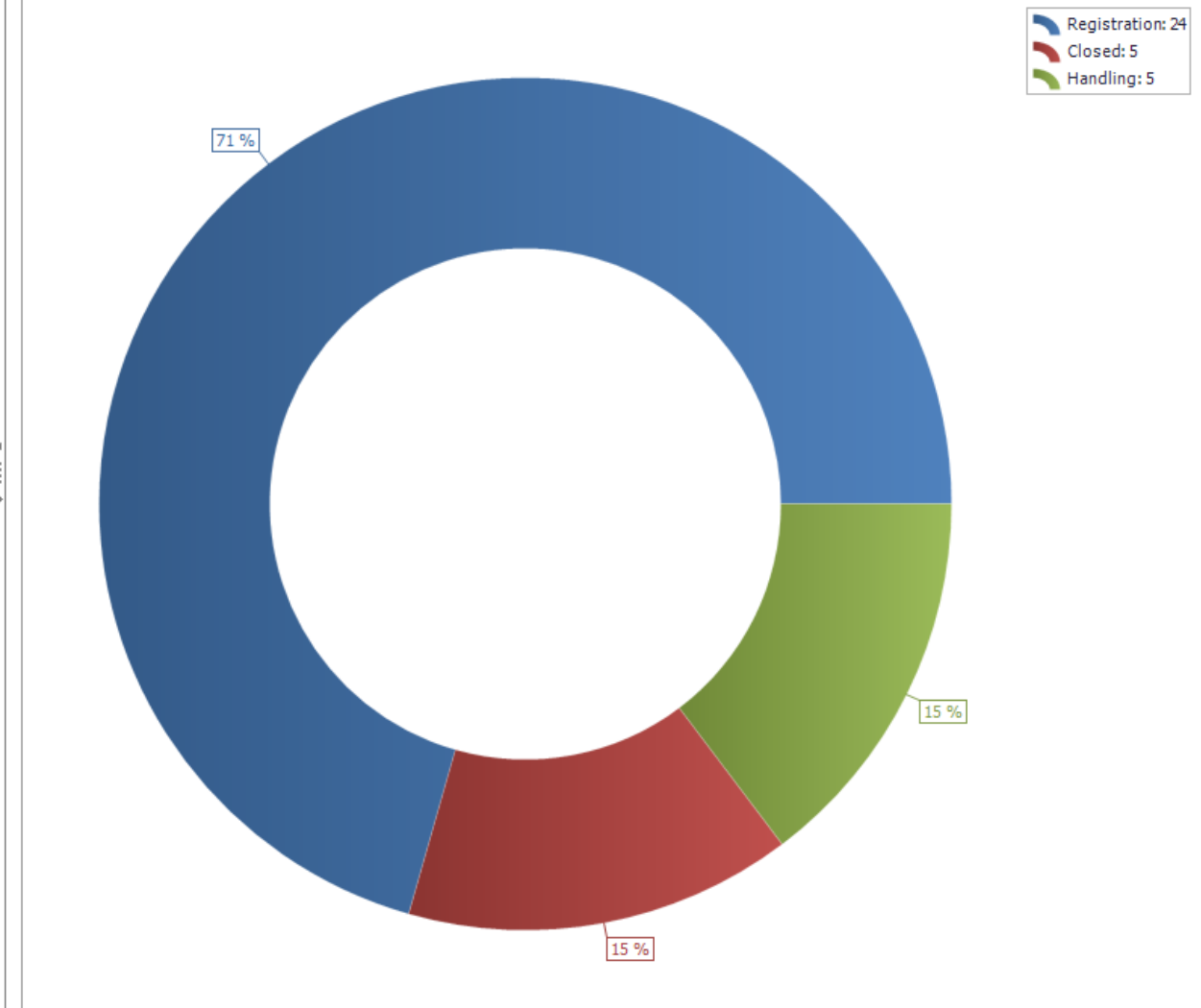


# Analytics - Change Requests

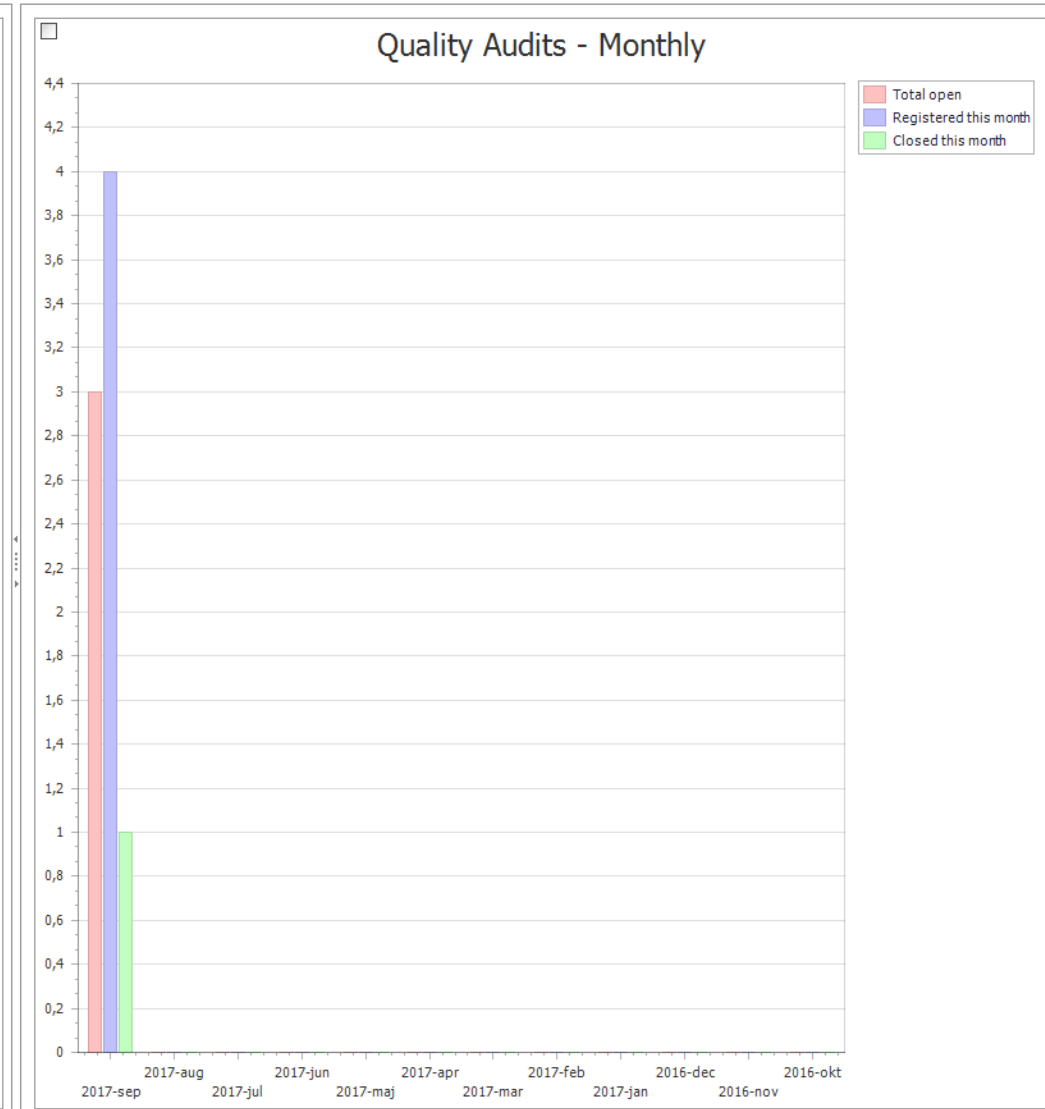
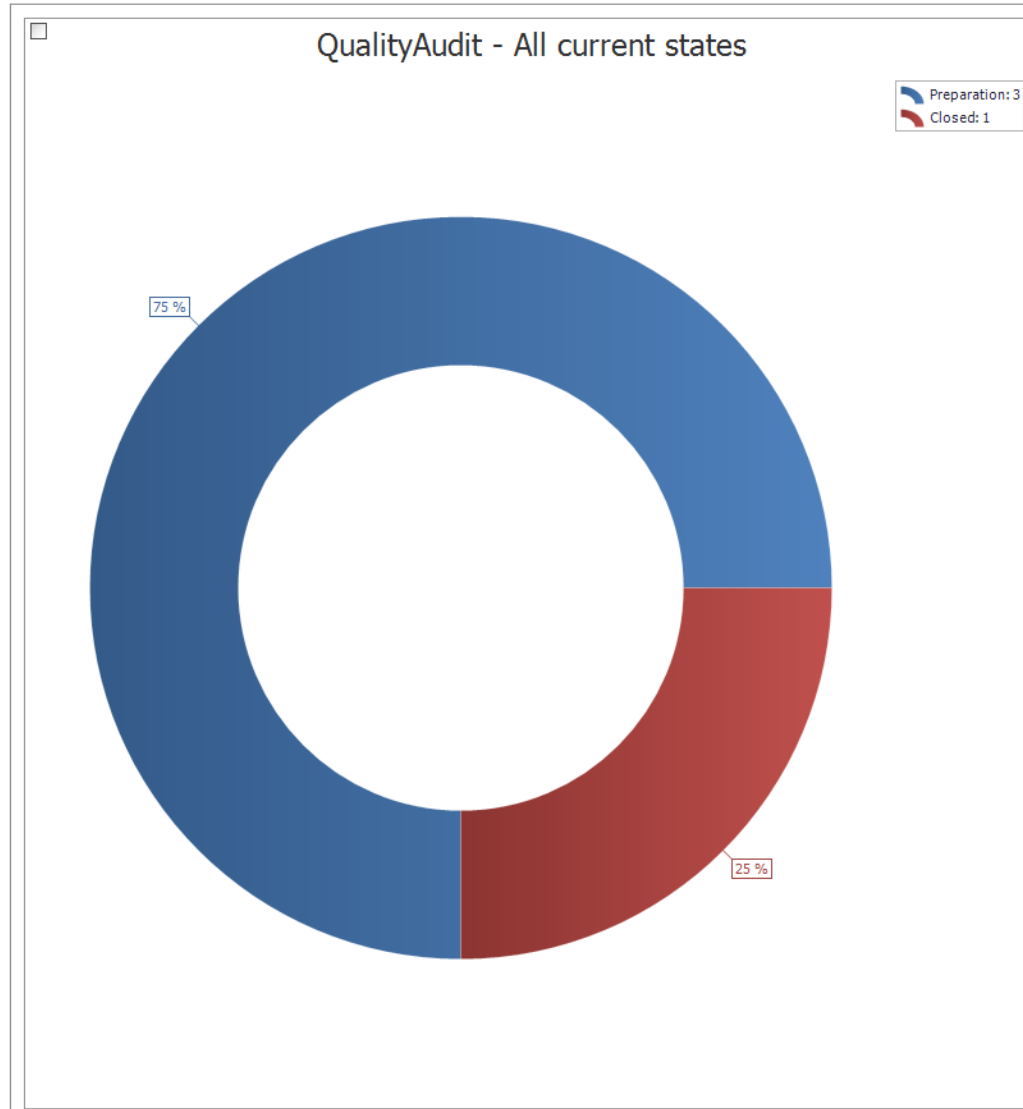
## Change request - Monthly



## Change request - All current states

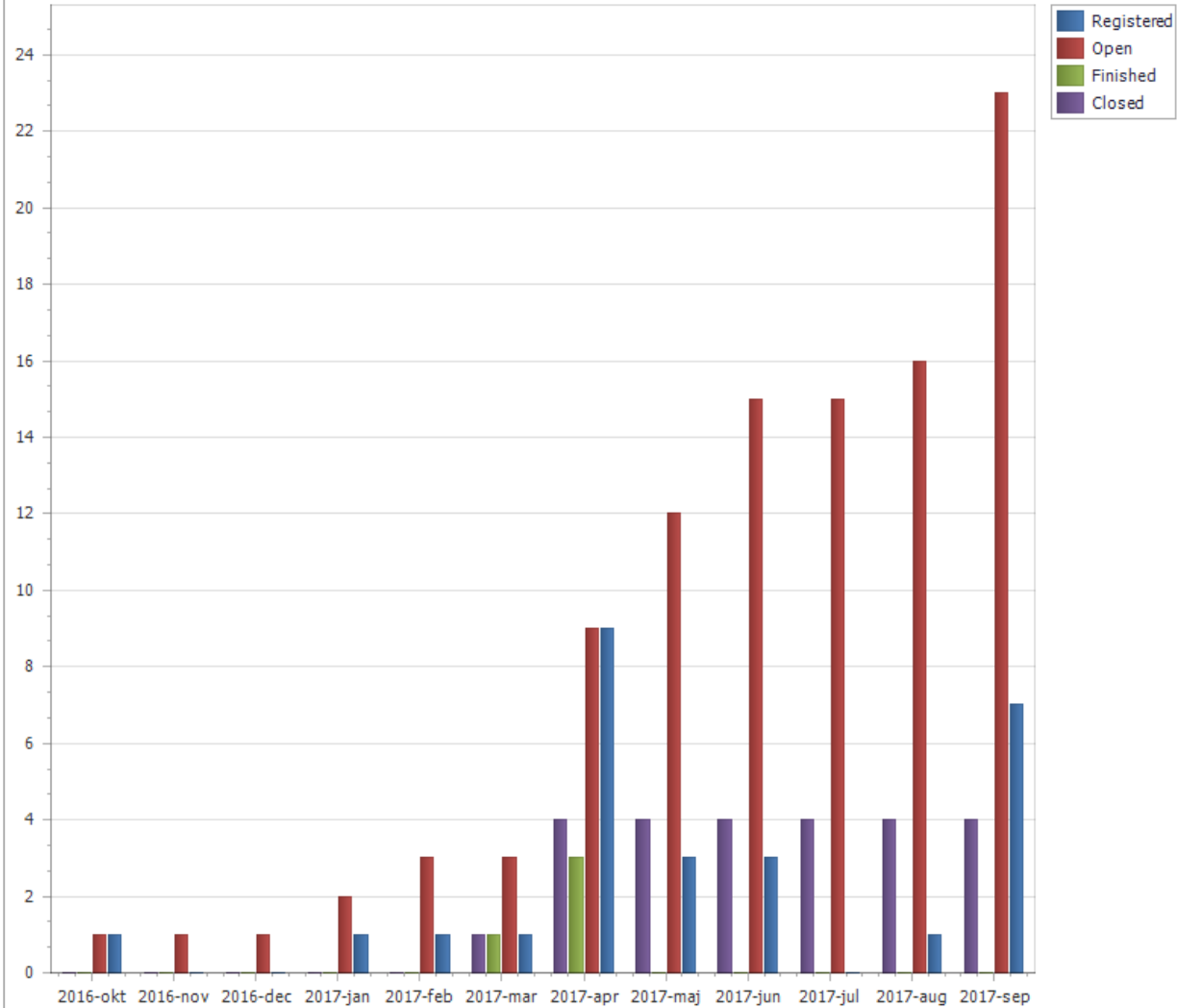


# Analytics - Audits

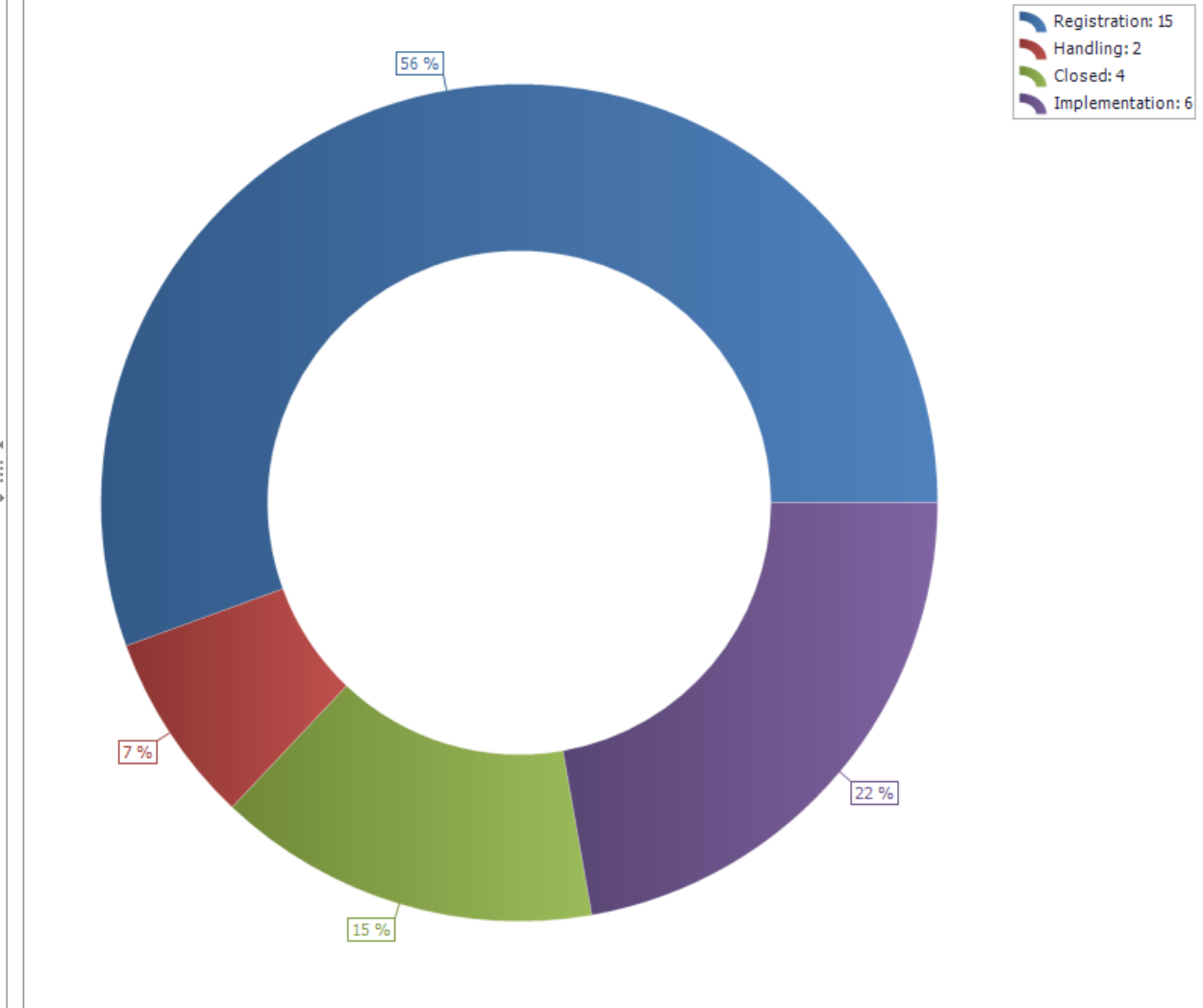


# Analytics – Non-conformances

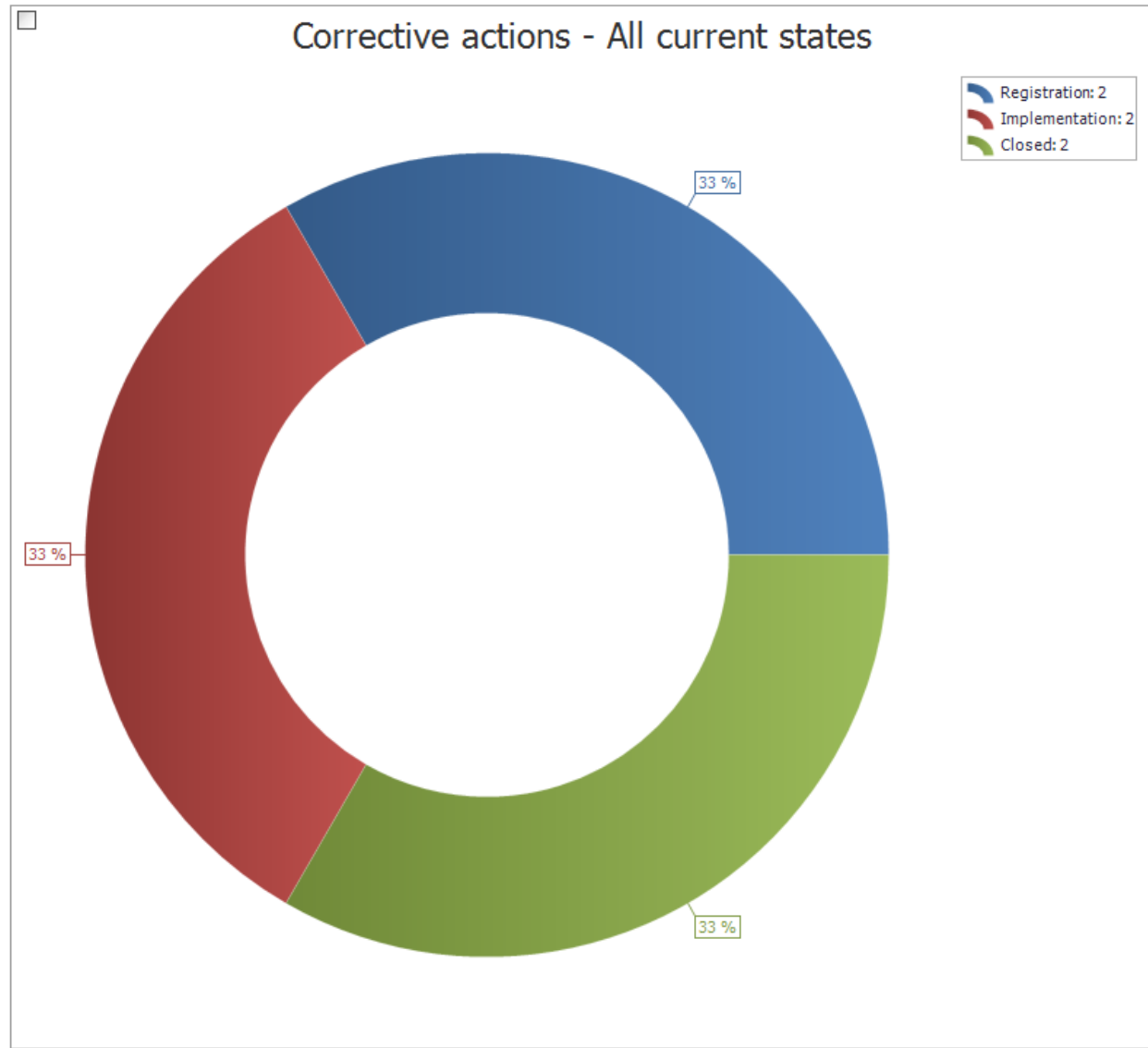
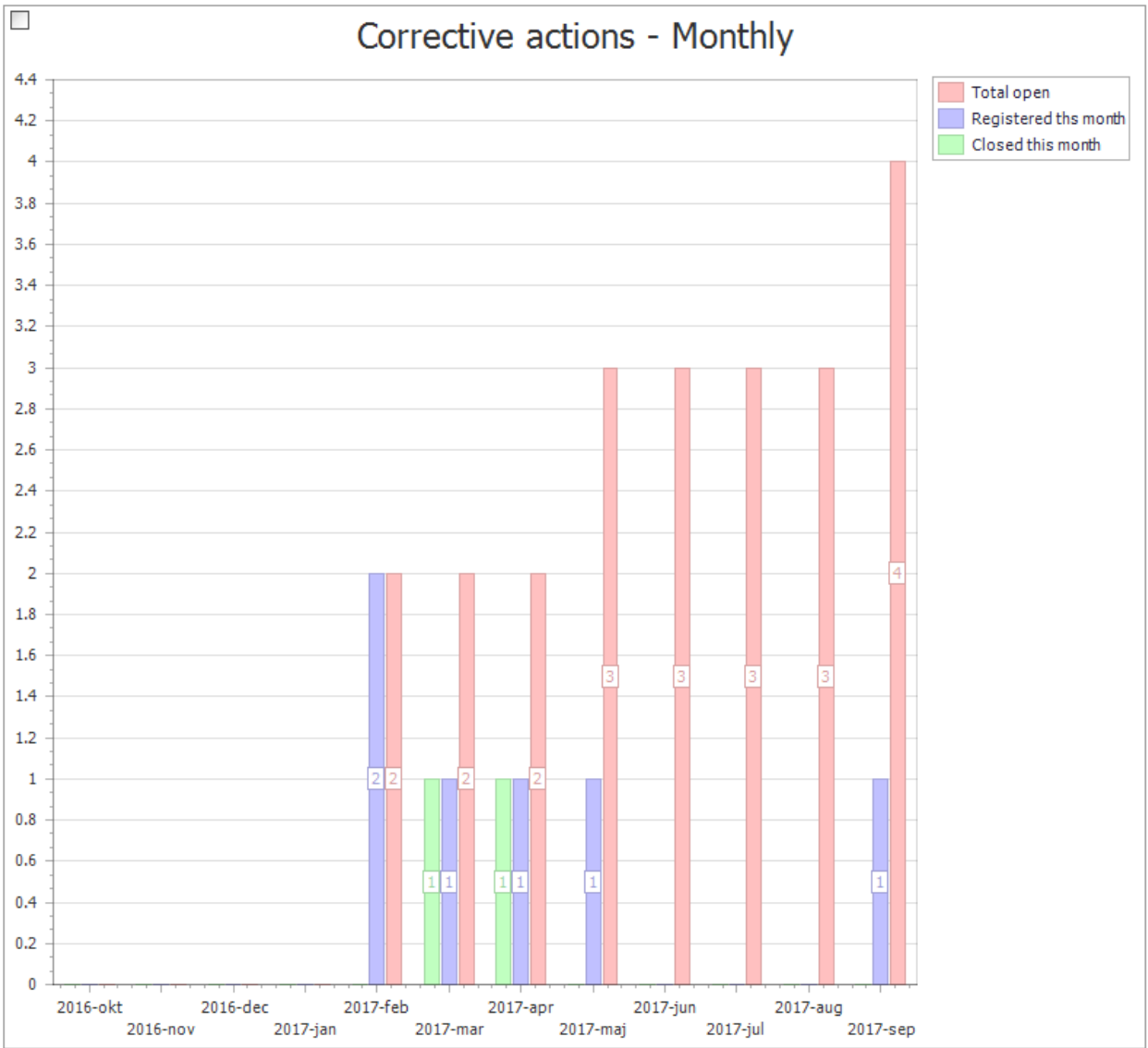
## Non-conformances - Monthly



## Non-conformances - State

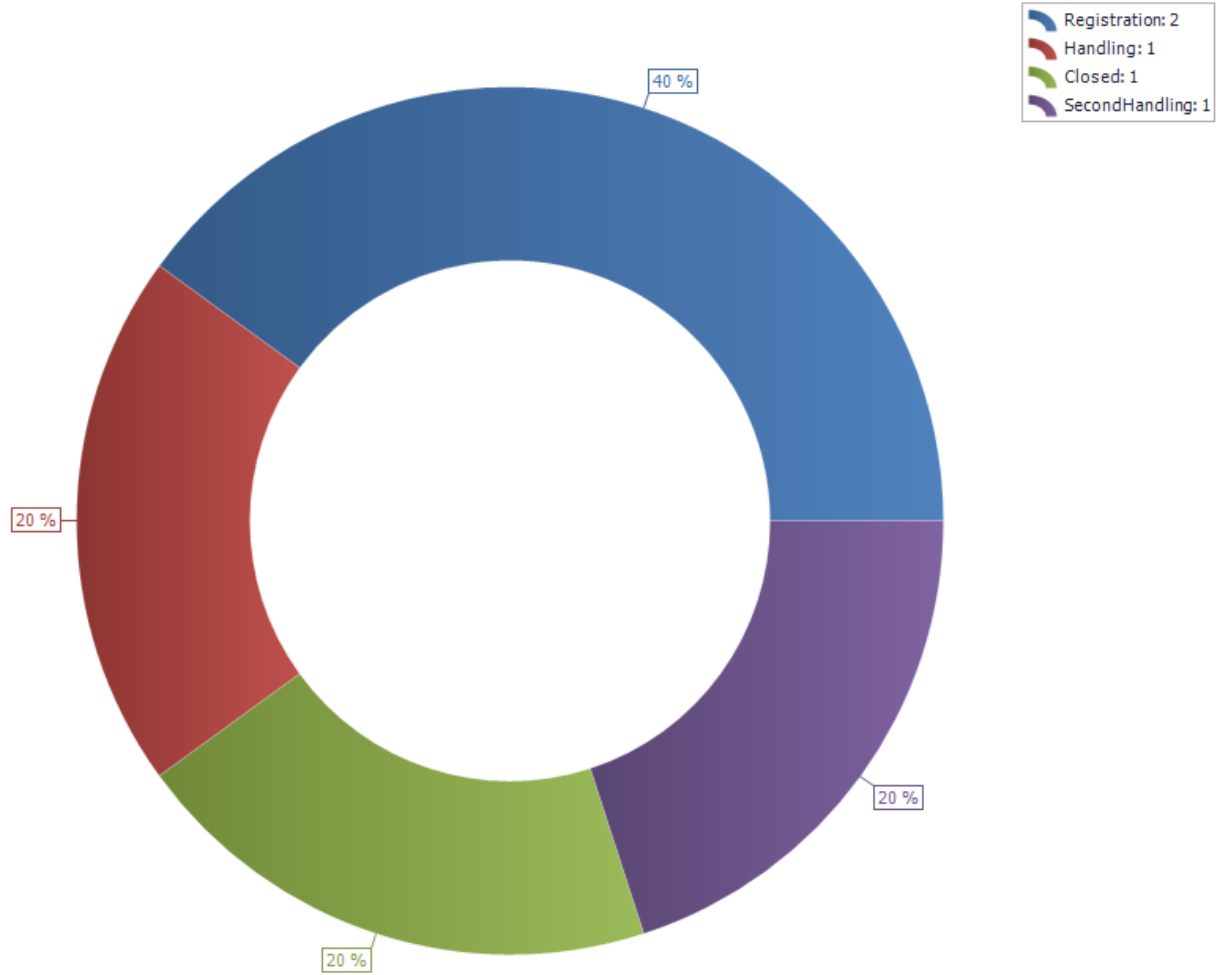


# Analytics – Corrective Actions



# Analytics - Complaints

## Complaint - All current states




## Complaint - Monthly



# Demo – Analytics

# Exercise 16 – Analytics

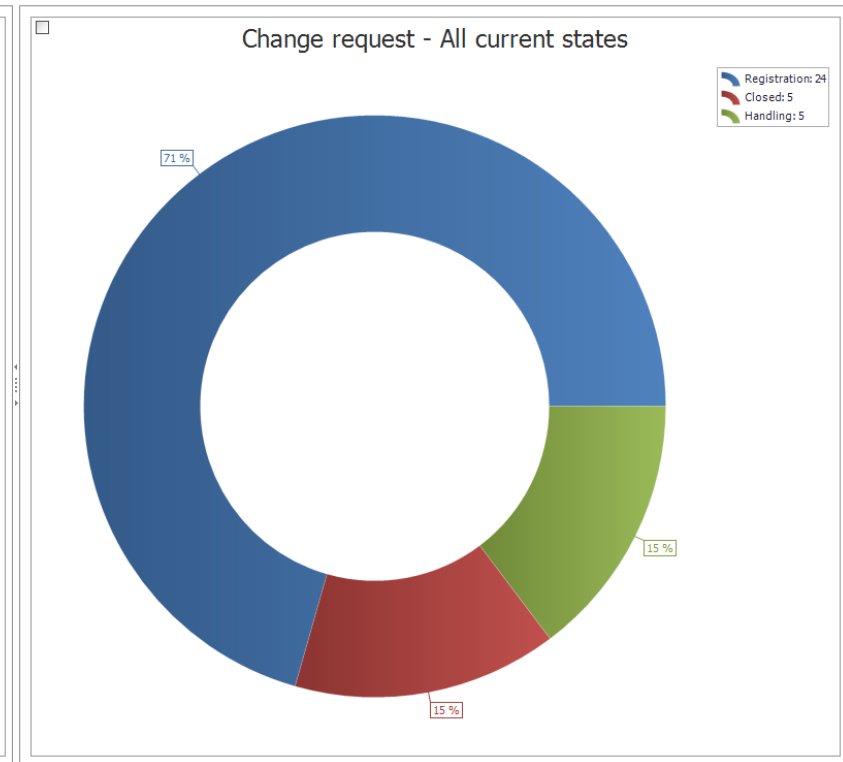
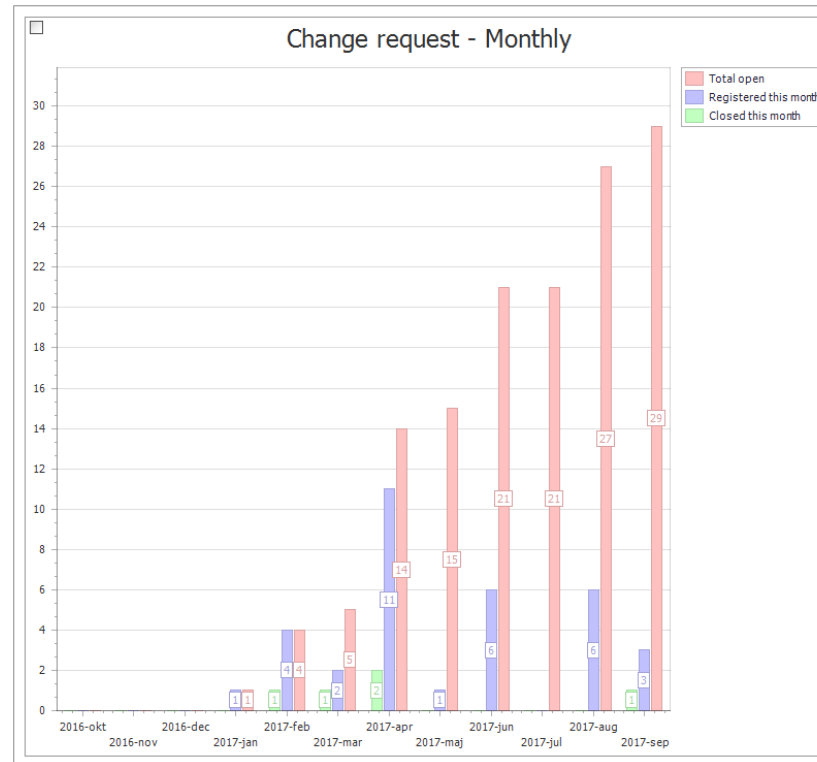
Purpose: Understand how to access and read analytics



**ANALYTICS** ▾

**Compliance**

- Change requests
- Non-conformances
- Complaints
- Corrective actions
- Quality Audits



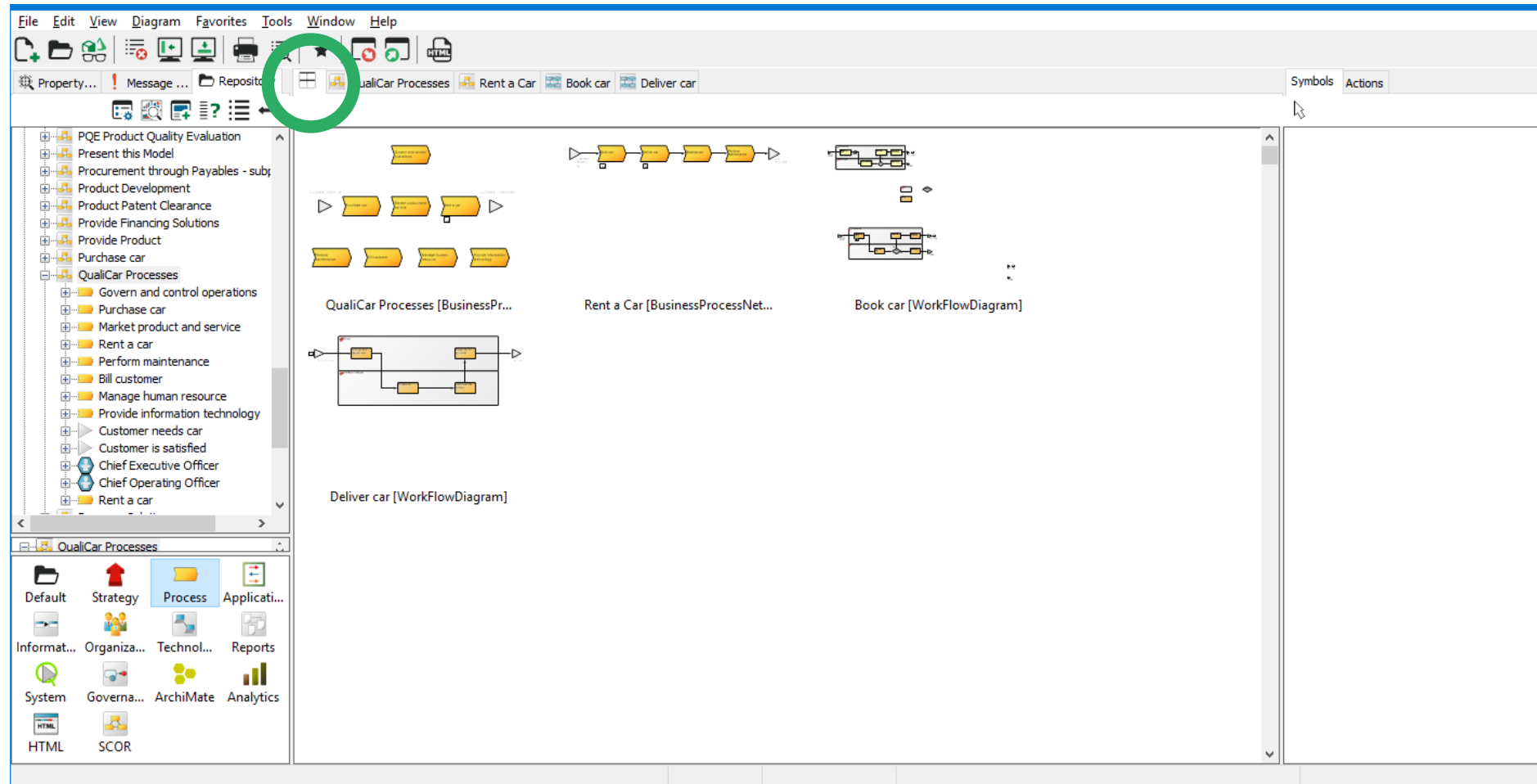




# Advanced Repository Explorer Part 1

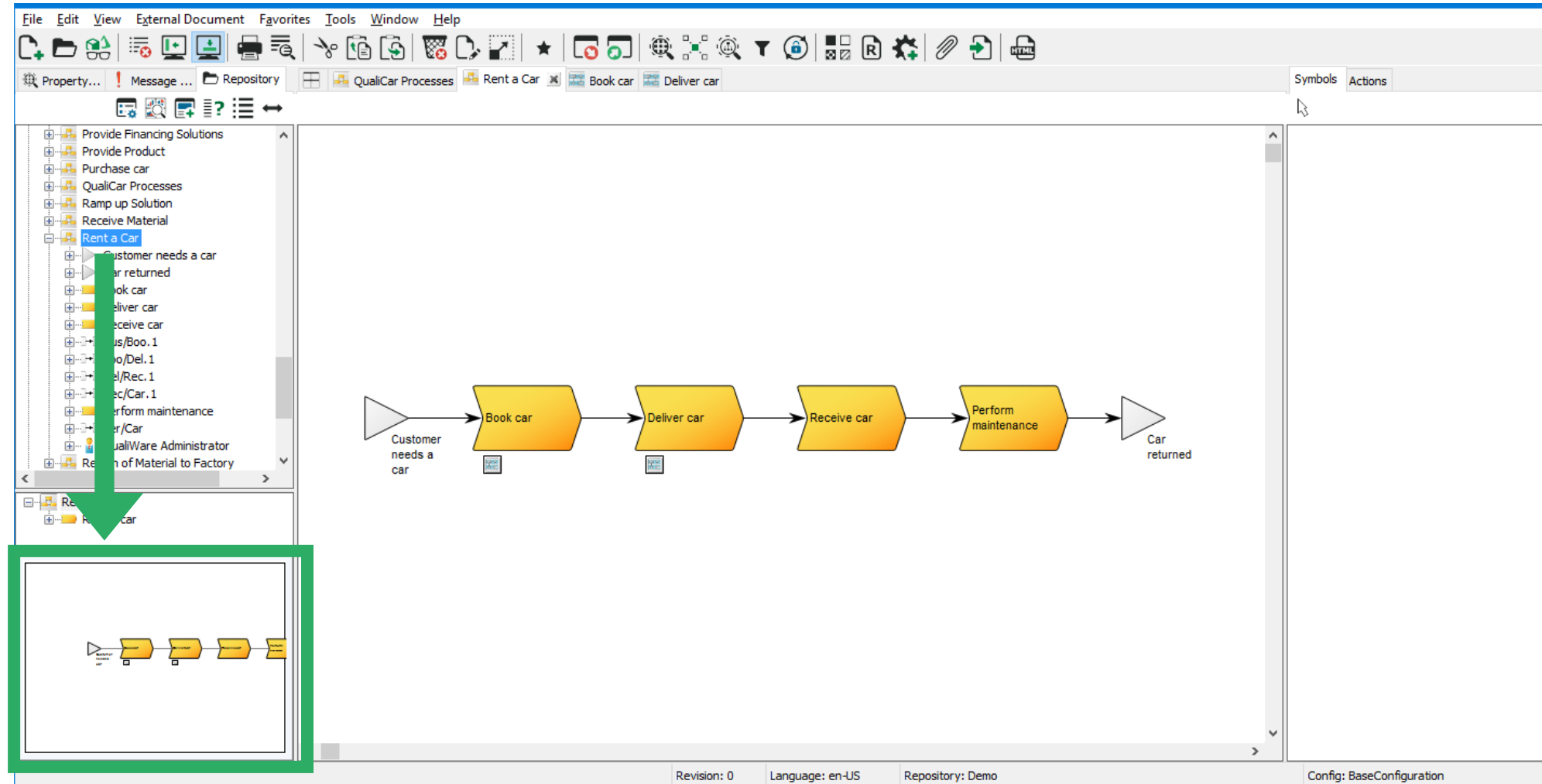
# Workspace and Tabs

- All active diagrams and objects are shown in an overview




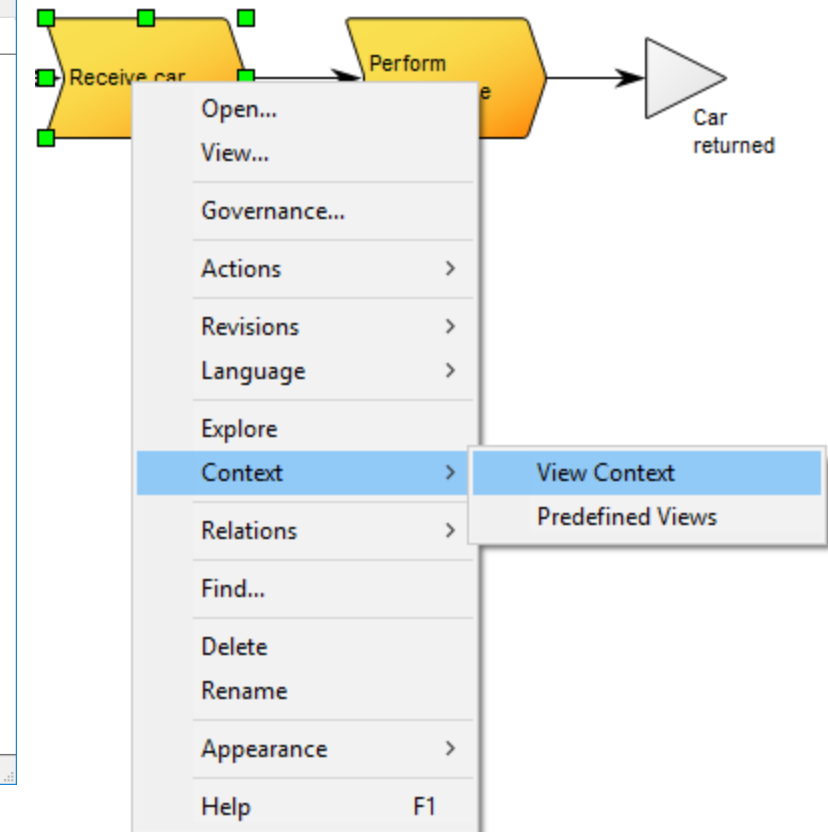
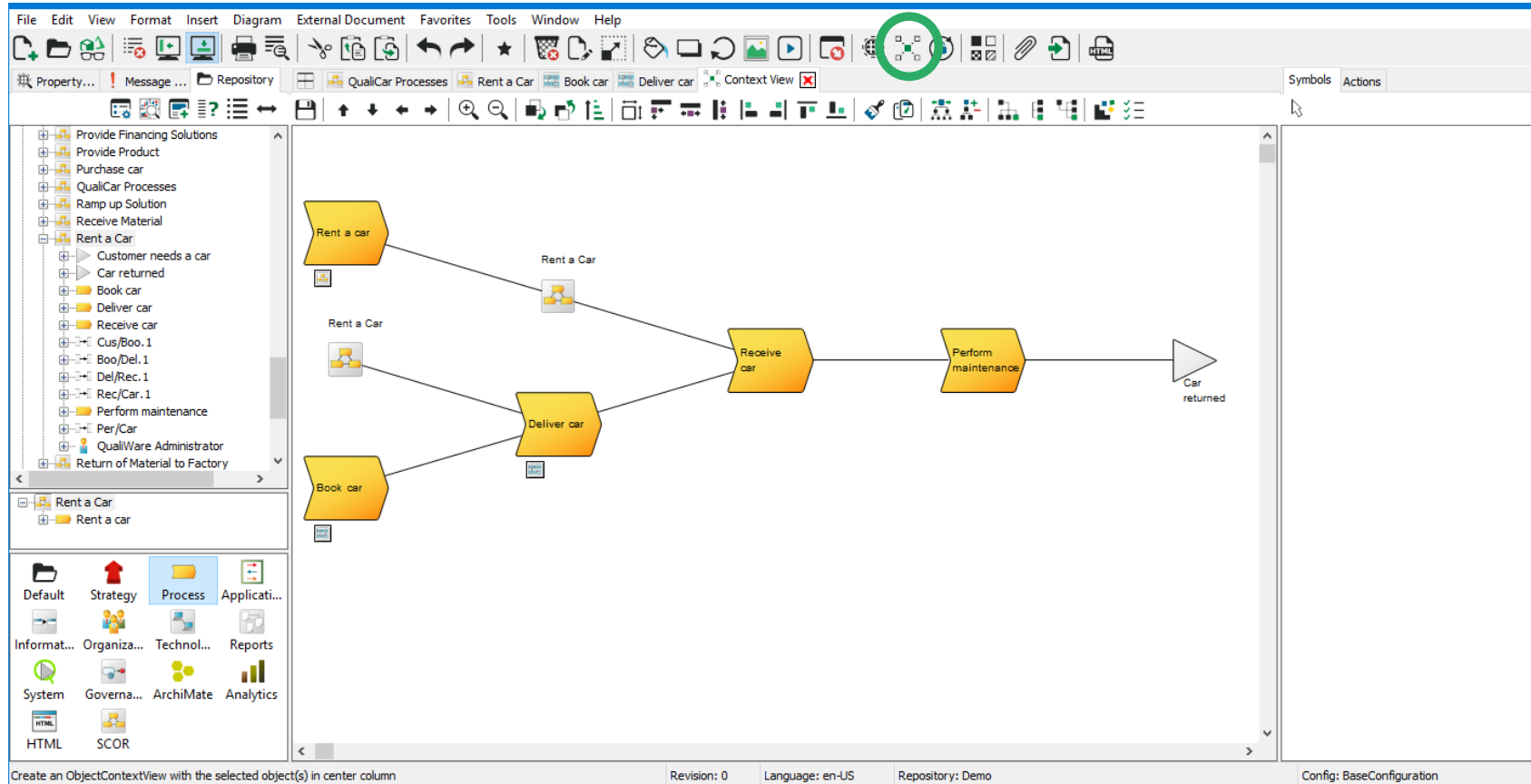
# Repository Preview

- Preview for diagrams



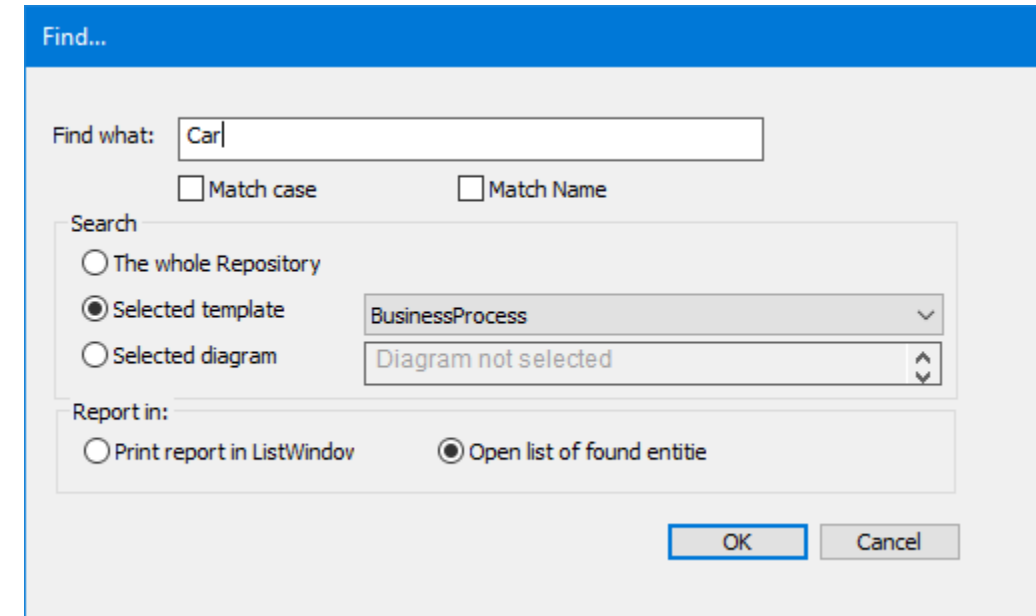
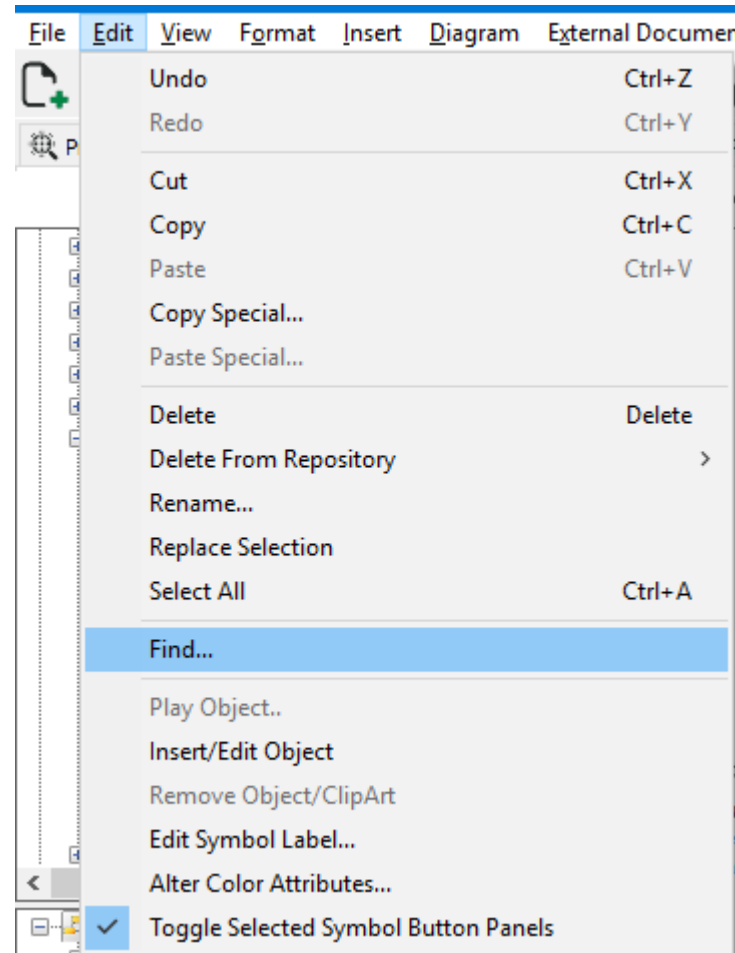
# Graphical Context Explorer

- Object context view  shows all relations from/to an object in a graphical view



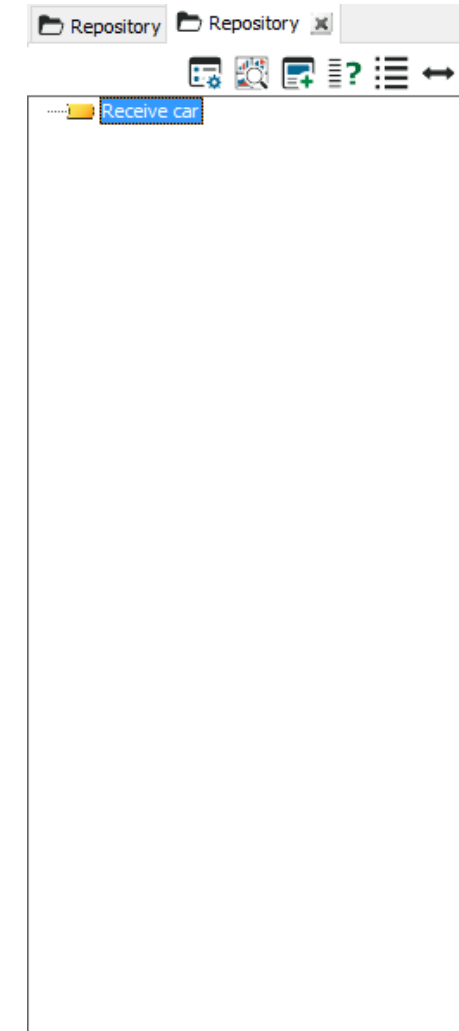
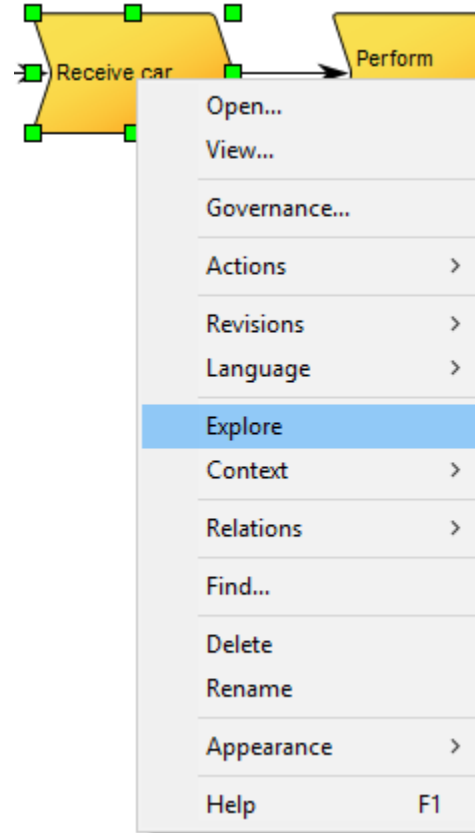
# Search the repository

- Use Edit->Find
- Select template
- Open list



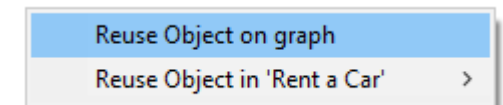
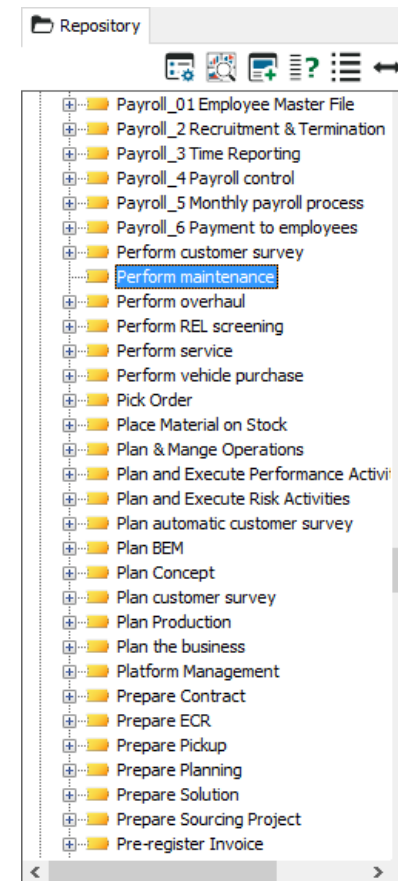
# Explore feature

- Bookmark-like feature
- Quickly re-use symbols



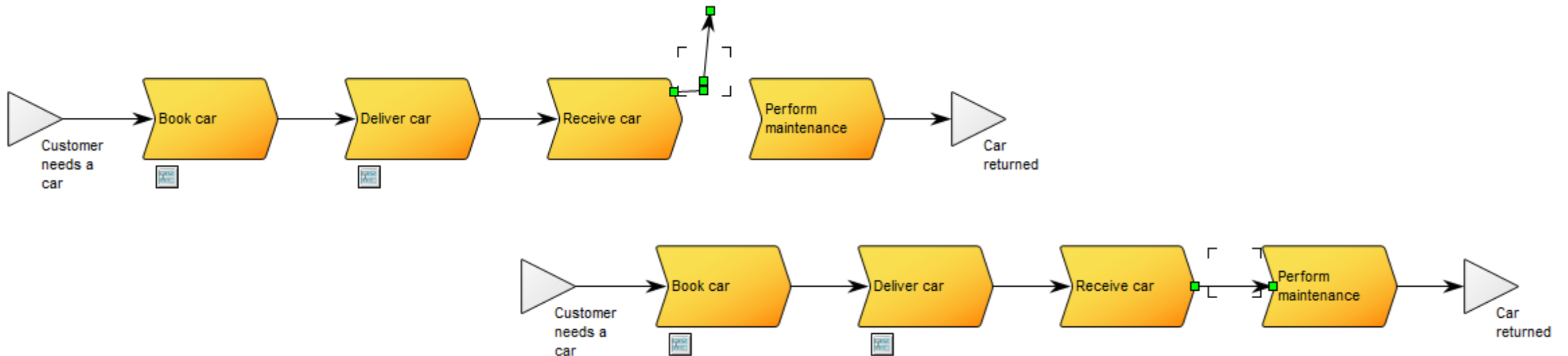
# Right-click drag feature

- Navigate to object in repository explorer
- Drag the object on to the canvas with the right mouse button
- Re-use graphically or in the properties



# Detach connectors

- Select connector
- Hold CTRL
- Drag green box away from a symbol and on to another



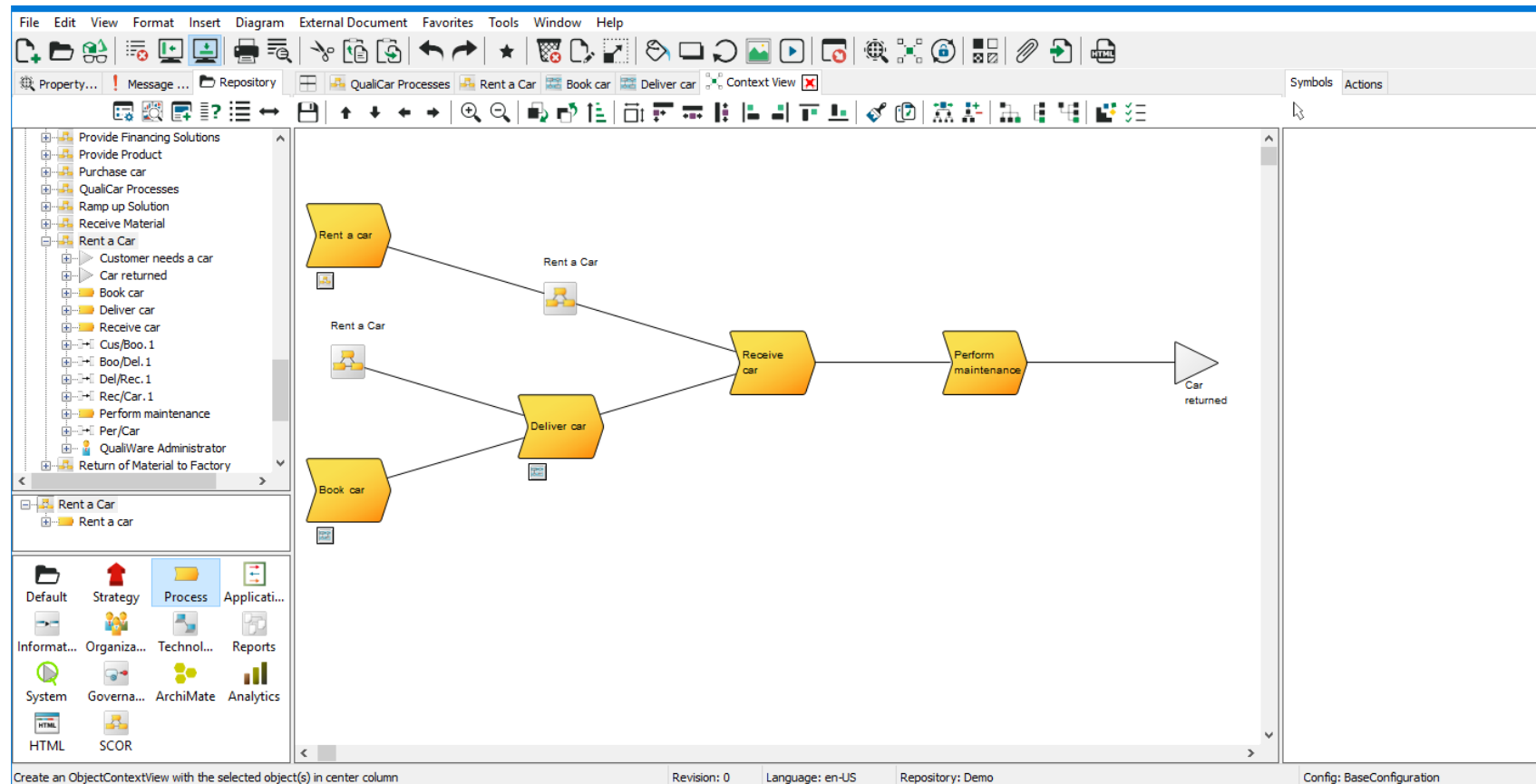




# Demo - Advanced Repository Explorer Part 1

# Lesson 8 – Advanced Repository Explorer Part 1

**Purpose:** Understand the graphical context view, search function, explore feature and right-click drag feature.



# Advanced Repository Explorer Part 2

# Repository Explorer

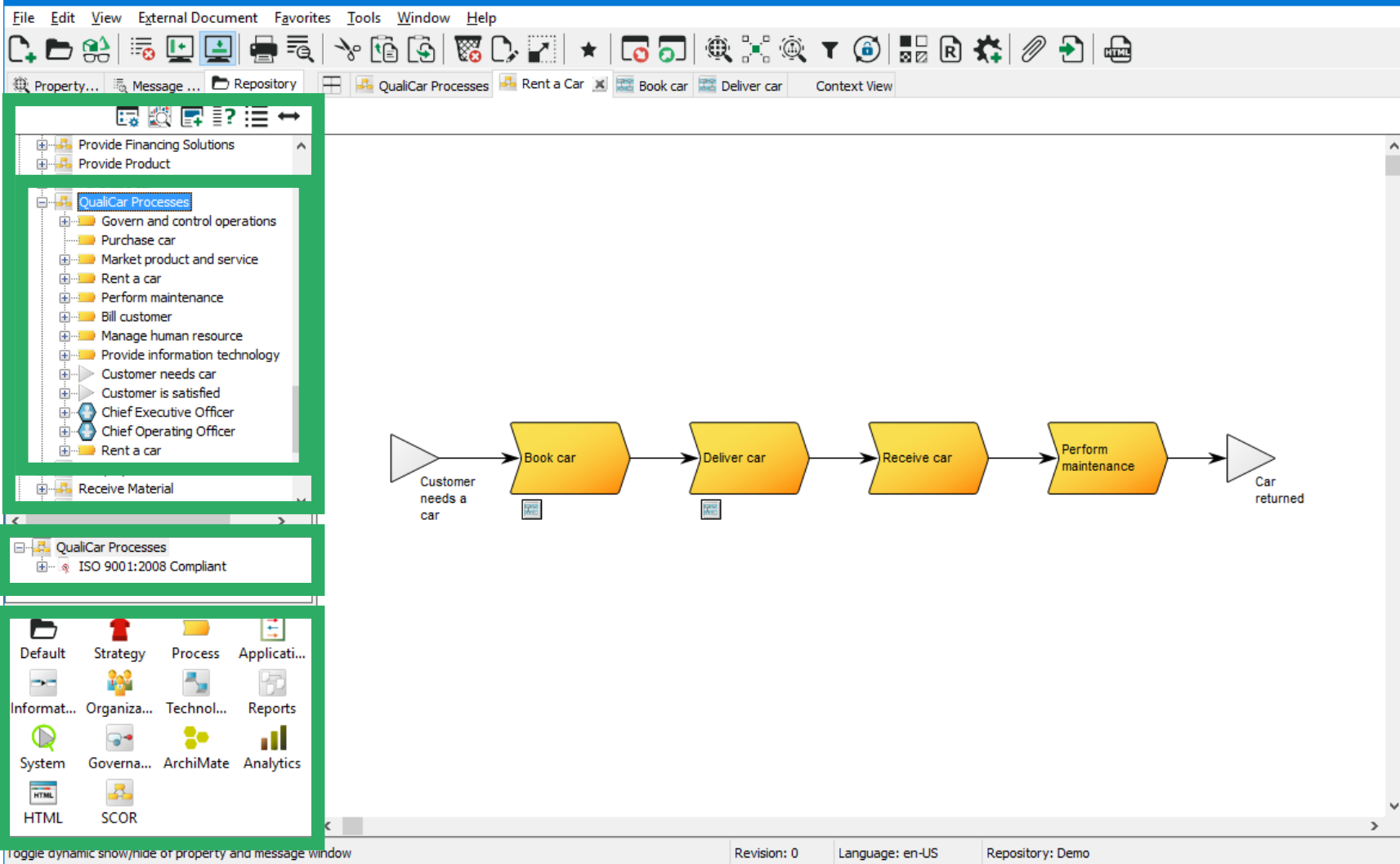
Tree view with template's and objects



Tree view with "backward relations" (Scope window)



Views define what to see in the Repository Explorer



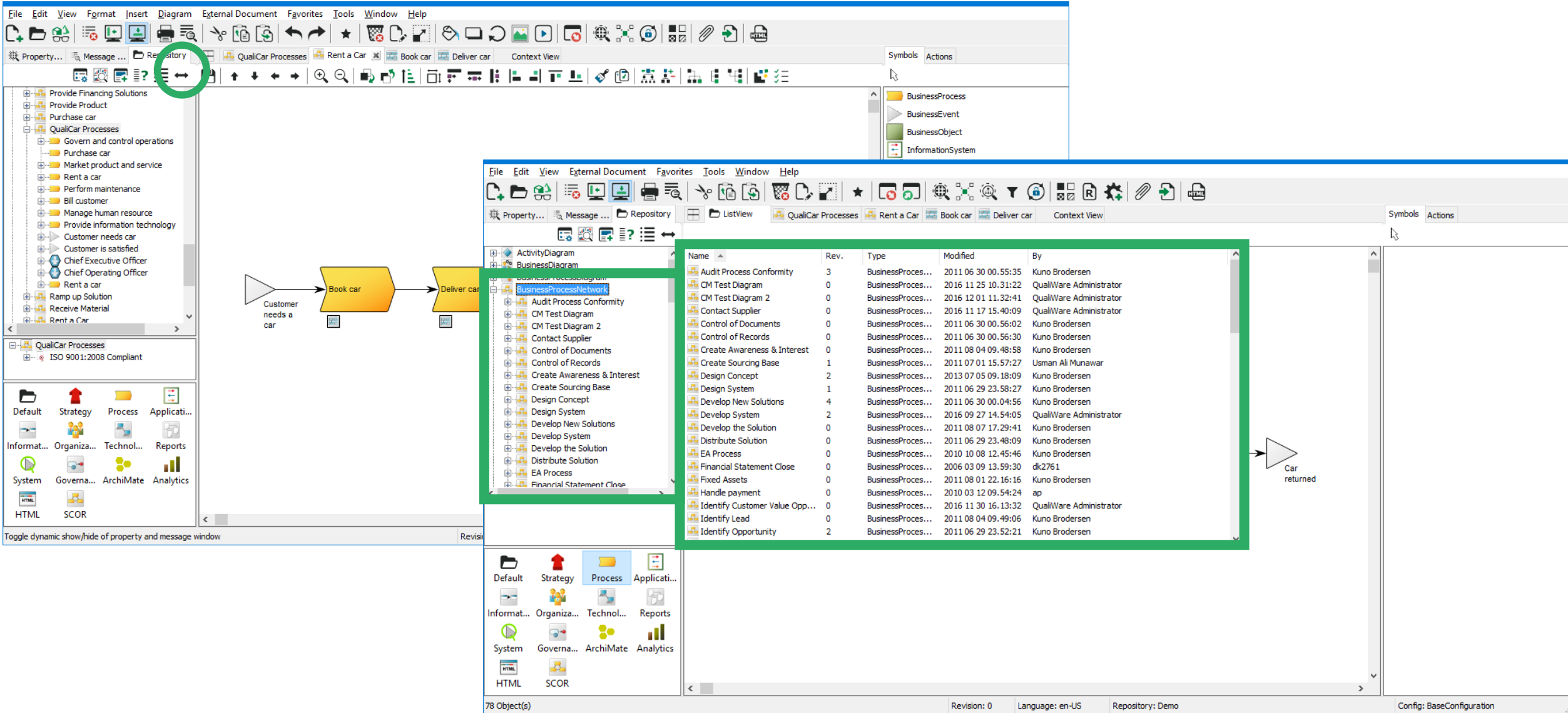
The screenshot shows the Repository Explorer application window. The menu bar includes File, Edit, View, External Document, Favorites, Tools, Window, and Help. The toolbar contains various icons for file operations and navigation. The main workspace is divided into three sections:

- Tree View (Left):** A hierarchical tree structure. The top level shows 'Provide Financing Solutions' and 'Provide Product'. Under 'Provide Product', there is a folder 'QualiCar Processes' which contains several sub-folders: 'Govern and control operations', 'Purchase car', 'Market product and service', 'Rent a car', 'Perform maintenance', 'Bill customer', 'Manage human resource', 'Provide information technology', 'Customer needs car', 'Customer is satisfied', 'Chief Executive Officer', and 'Chief Operating Officer'. Below this is 'Receive Material'.
- Scope Window (Middle):** A smaller tree view showing 'QualiCar Processes' and 'ISO 9001:2008 Compliant'.
- Views Grid (Bottom):** A grid of icons representing different views: Default, Strategy, Process, Applicati..., Informat..., Organiza..., Technol..., Reports, System, Govern..., ArchiMate, Analytics, HTML, and SCOR.

On the right side of the main workspace, there is a process flow diagram. It starts with a start node 'Customer needs a car', followed by four process steps: 'Book car', 'Deliver car', 'Receive car', and 'Perform maintenance', each in a yellow chevron shape. The flow ends at a final node 'Car returned'.

At the bottom of the window, there is a status bar with the text: 'Toggle dynamic show/hide of property and message window', 'Revision: 0', 'Language: en-US', and 'Repository: Demo'.

# List window

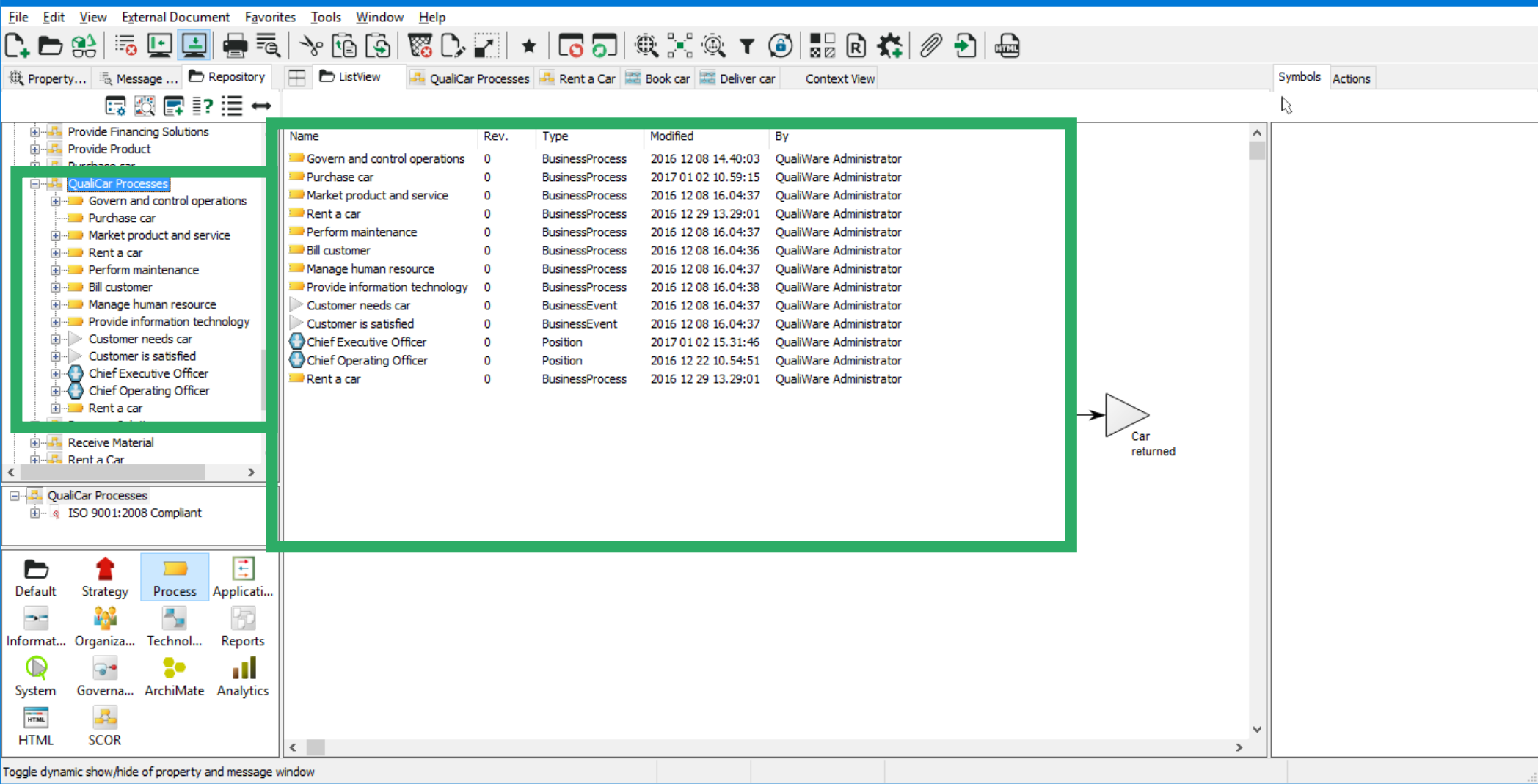


The screenshot displays the QualiWare interface. On the left, a tree view shows a project structure under 'QualiCar Processes'. The main workspace shows a process diagram with a start event 'Customer needs a car', followed by two process steps: 'Book car' and 'Deliver car'. A 'List window' is overlaid on the diagram, displaying a table of objects. The table has columns for Name, Rev., Type, Modified, and By. The 'BusinessProcessNetwork' folder is selected in the tree view, and its contents are listed in the table. A green circle highlights the 'List' icon in the top toolbar, and a green box highlights the list window. A green arrow points from the 'List window' to the 'Deliver car' process step.

Name	Rev.	Type	Modified	By
Audit Process Conformity	3	BusinessProces...	2011 06 30 00:55:35	Kuno Brodersen
CM Test Diagram	0	BusinessProces...	2016 11 25 10:31:22	QualiWare Administrator
CM Test Diagram 2	0	BusinessProces...	2016 12 01 11:32:41	QualiWare Administrator
Contact Supplier	0	BusinessProces...	2016 11 17 15:40:09	QualiWare Administrator
Control of Documents	0	BusinessProces...	2011 06 30 00:56:02	Kuno Brodersen
Control of Records	0	BusinessProces...	2011 06 30 00:56:30	Kuno Brodersen
Create Awareness & Interest	0	BusinessProces...	2011 08 04 09:48:58	Kuno Brodersen
Create Sourcing Base	1	BusinessProces...	2011 07 01 15:57:27	Usman Ali Munawar
Design Concept	2	BusinessProces...	2013 07 05 09:18:09	Kuno Brodersen
Design System	1	BusinessProces...	2011 06 29 23:58:27	Kuno Brodersen
Develop New Solutions	4	BusinessProces...	2011 06 30 00:04:56	Kuno Brodersen
Develop System	2	BusinessProces...	2016 09 27 14:54:05	QualiWare Administrator
Develop the Solution	0	BusinessProces...	2011 08 07 17:29:41	Kuno Brodersen
Distribute Solution	0	BusinessProces...	2011 06 29 23:48:09	Kuno Brodersen
EA Process	0	BusinessProces...	2010 10 08 12:45:46	Kuno Brodersen
Financial Statement Close	0	BusinessProces...	2006 03 09 13:59:30	dk:2761
Fixed Assets	0	BusinessProces...	2011 08 01 22:16:16	Kuno Brodersen
Handle payment	0	BusinessProces...	2010 03 12 09:54:24	ap
Identify Customer Value Opp...	0	BusinessProces...	2016 11 30 16:13:32	QualiWare Administrator
Identify Lead	0	BusinessProces...	2011 08 04 09:49:06	Kuno Brodersen
Identify Opportunity	2	BusinessProces...	2011 06 29 23:52:21	Kuno Brodersen

78 Object(s)      Revision: 0      Language: en-US      Repository: Demo      Config: BaseConfiguration

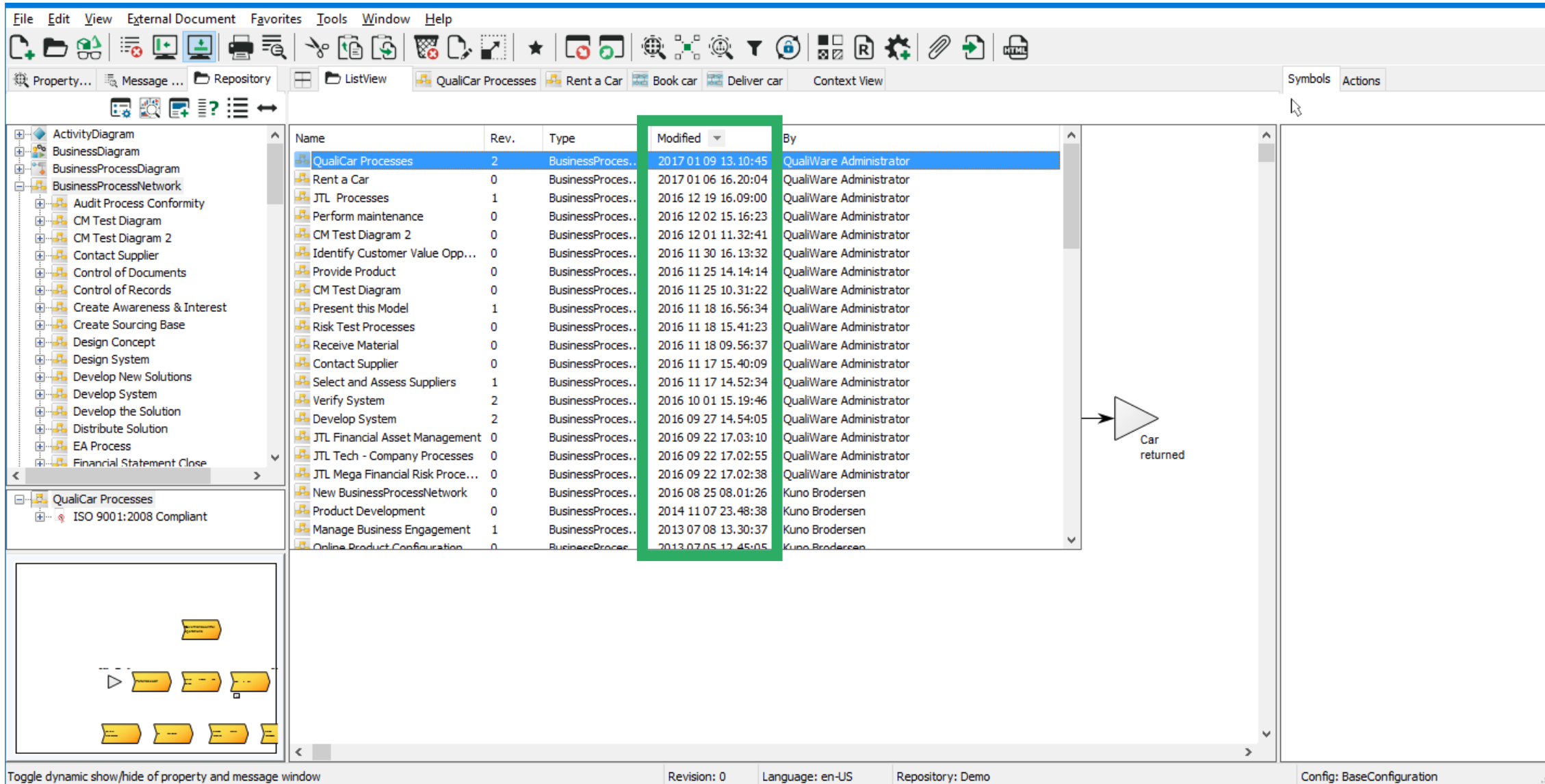
# List window



The screenshot displays the QualiWare software interface. The main window is titled "List window" and shows a table of processes. The table has columns for Name, Rev., Type, Modified, and By. The "QualiCar Processes" folder is expanded in the left-hand tree view, and its contents are listed in the table. A green box highlights the "QualiCar Processes" folder in the tree view and the corresponding table entries. A diagram element, a triangle labeled "Car returned", is shown on the right side of the interface, with an arrow pointing from the table area towards it.

Name	Rev.	Type	Modified	By
Government and control operations	0	BusinessProcess	2016 12 08 14:40:03	QualiWare Administrator
Purchase car	0	BusinessProcess	2017 01 02 10:59:15	QualiWare Administrator
Market product and service	0	BusinessProcess	2016 12 08 16:04:37	QualiWare Administrator
Rent a car	0	BusinessProcess	2016 12 29 13:29:01	QualiWare Administrator
Perform maintenance	0	BusinessProcess	2016 12 08 16:04:37	QualiWare Administrator
Bill customer	0	BusinessProcess	2016 12 08 16:04:36	QualiWare Administrator
Manage human resource	0	BusinessProcess	2016 12 08 16:04:37	QualiWare Administrator
Provide information technology	0	BusinessProcess	2016 12 08 16:04:38	QualiWare Administrator
Customer needs car	0	BusinessEvent	2016 12 08 16:04:37	QualiWare Administrator
Customer is satisfied	0	BusinessEvent	2016 12 08 16:04:37	QualiWare Administrator
Chief Executive Officer	0	Position	2017 01 02 15:31:46	QualiWare Administrator
Chief Operating Officer	0	Position	2016 12 22 10:54:51	QualiWare Administrator
Rent a car	0	BusinessProcess	2016 12 29 13:29:01	QualiWare Administrator

# List window



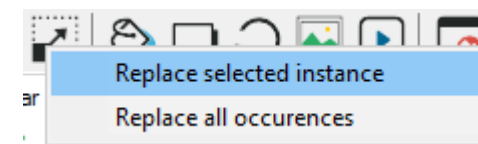
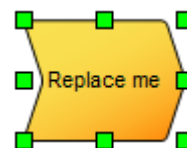
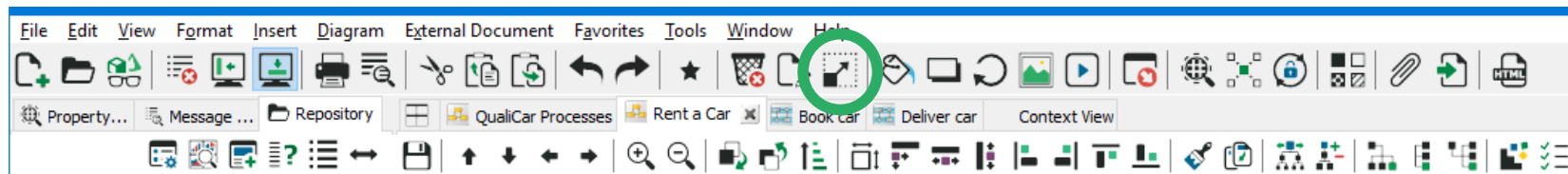
The screenshot displays the QualiWare software interface. The main window is titled 'List window' and shows a table of process items. The table has columns for Name, Rev., Type, Modified, and By. The 'Modified' column is highlighted in green. The table contains the following data:

Name	Rev.	Type	Modified	By
QualiCar Processes	2	BusinessProces...	2017 01 09 13.10:45	QualiWare Administrator
Rent a Car	0	BusinessProces...	2017 01 06 16.20:04	QualiWare Administrator
JTL Processes	1	BusinessProces...	2016 12 19 16.09:00	QualiWare Administrator
Perform maintenance	0	BusinessProces...	2016 12 02 15.16:23	QualiWare Administrator
CM Test Diagram 2	0	BusinessProces...	2016 12 01 11.32:41	QualiWare Administrator
Identify Customer Value Opp...	0	BusinessProces...	2016 11 30 16.13:32	QualiWare Administrator
Provide Product	0	BusinessProces...	2016 11 25 14.14:14	QualiWare Administrator
CM Test Diagram	0	BusinessProces...	2016 11 25 10.31:22	QualiWare Administrator
Present this Model	1	BusinessProces...	2016 11 18 16.56:34	QualiWare Administrator
Risk Test Processes	0	BusinessProces...	2016 11 18 15.41:23	QualiWare Administrator
Receive Material	0	BusinessProces...	2016 11 18 09.56:37	QualiWare Administrator
Contact Supplier	0	BusinessProces...	2016 11 17 15.40:09	QualiWare Administrator
Select and Assess Suppliers	1	BusinessProces...	2016 11 17 14.52:34	QualiWare Administrator
Verify System	2	BusinessProces...	2016 10 01 15.19:46	QualiWare Administrator
Develop System	2	BusinessProces...	2016 09 27 14.54:05	QualiWare Administrator
JTL Financial Asset Management	0	BusinessProces...	2016 09 22 17.03:10	QualiWare Administrator
JTL Tech - Company Processes	0	BusinessProces...	2016 09 22 17.02:55	QualiWare Administrator
JTL Mega Financial Risk Proce...	0	BusinessProces...	2016 09 22 17.02:38	QualiWare Administrator
New BusinessProcessNetwork	0	BusinessProces...	2016 08 25 08.01:26	Kuno Brodersen
Product Development	0	BusinessProces...	2014 11 07 23.48:38	Kuno Brodersen
Manage Business Engagement	1	BusinessProces...	2013 07 08 13.30:37	Kuno Brodersen
Online Product Configuration	0	BusinessProces...	2013 07 05 12.45:05	Kuno Brodersen

On the right side of the interface, there is a diagram showing a car icon with an arrow pointing to it, labeled 'Car returned'. The bottom status bar shows 'Revision: 0', 'Language: en-US', 'Repository: Demo', and 'Config: BaseConfiguration'.

# Replace symbol with another symbol

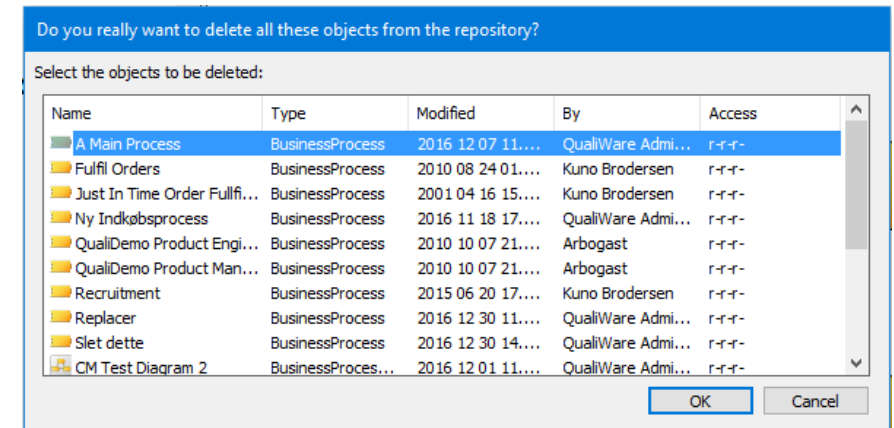
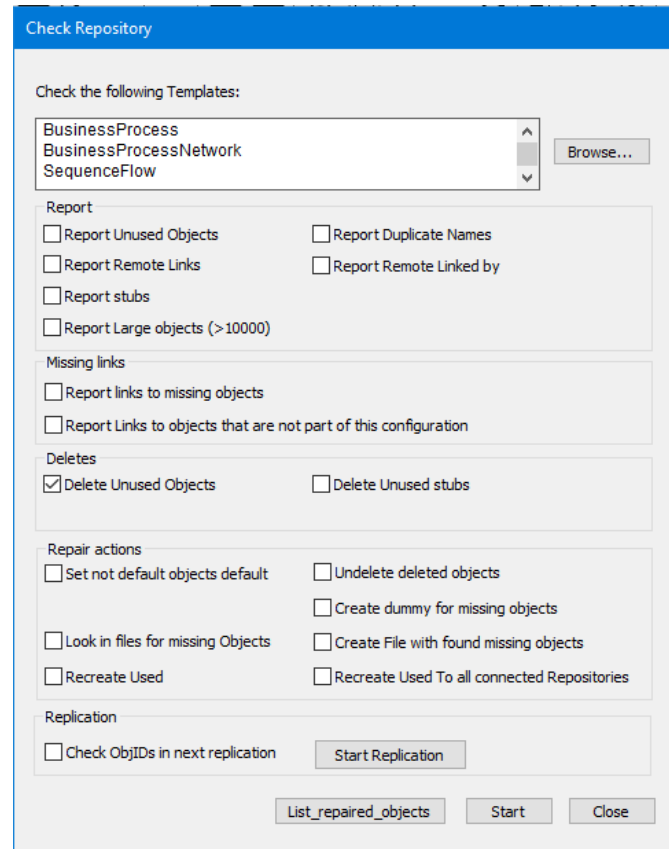
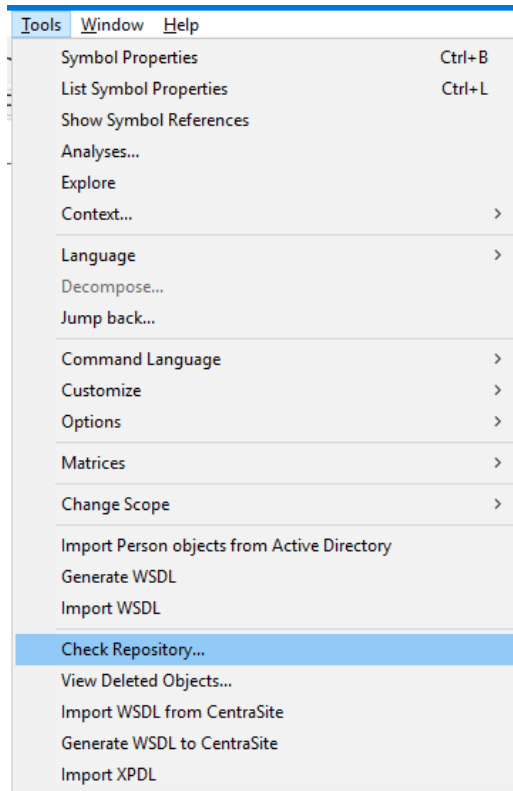
- Select object to replace either on a diagram or in the repository explorer
- Click on the “Replace selection with another object” button
- Replace either:
  - Instance
  - All occurrences





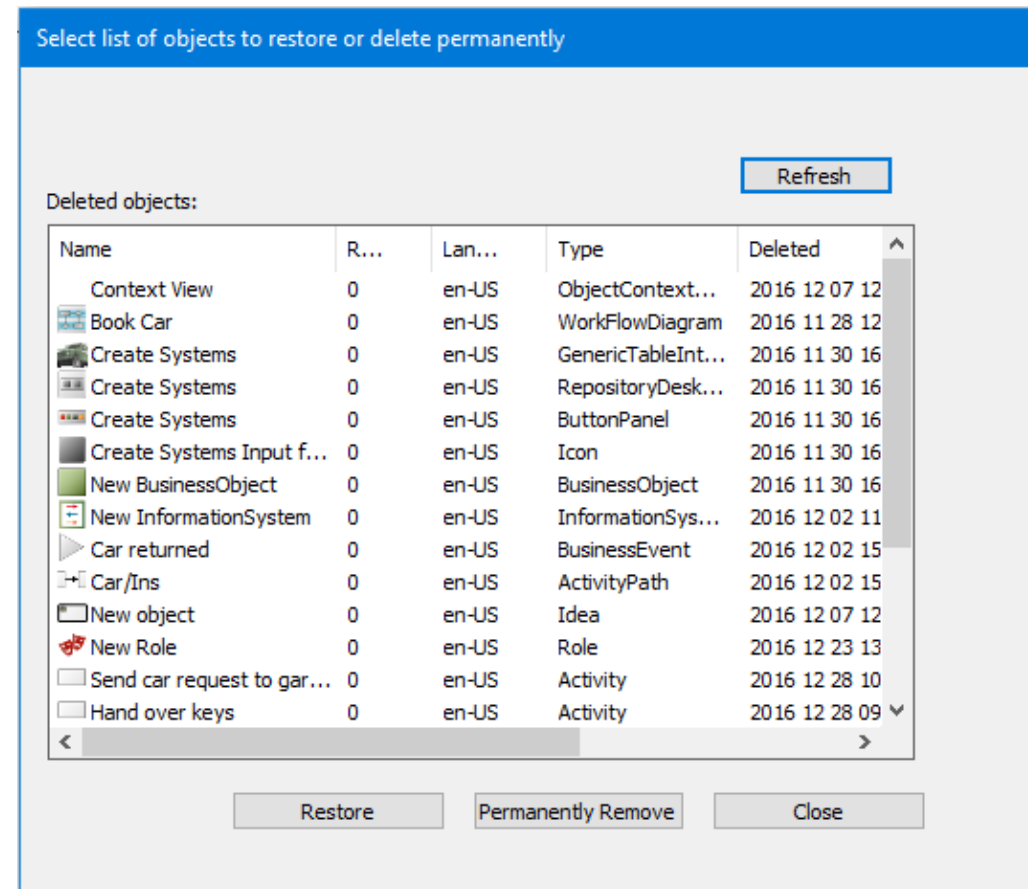
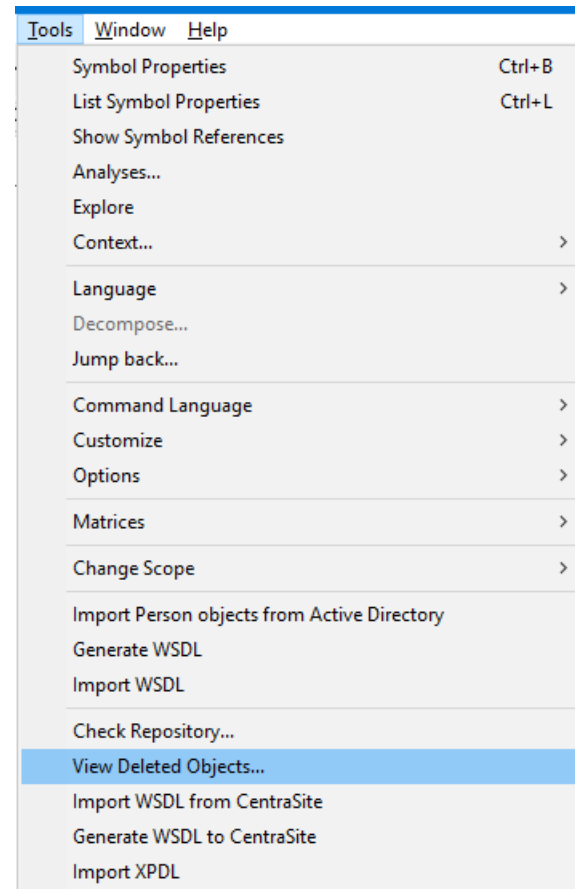
# Check repository

- Focus on the Repository Explorer
- Go to Tools->Check Repository...



# View deleted objects (recycle bin)

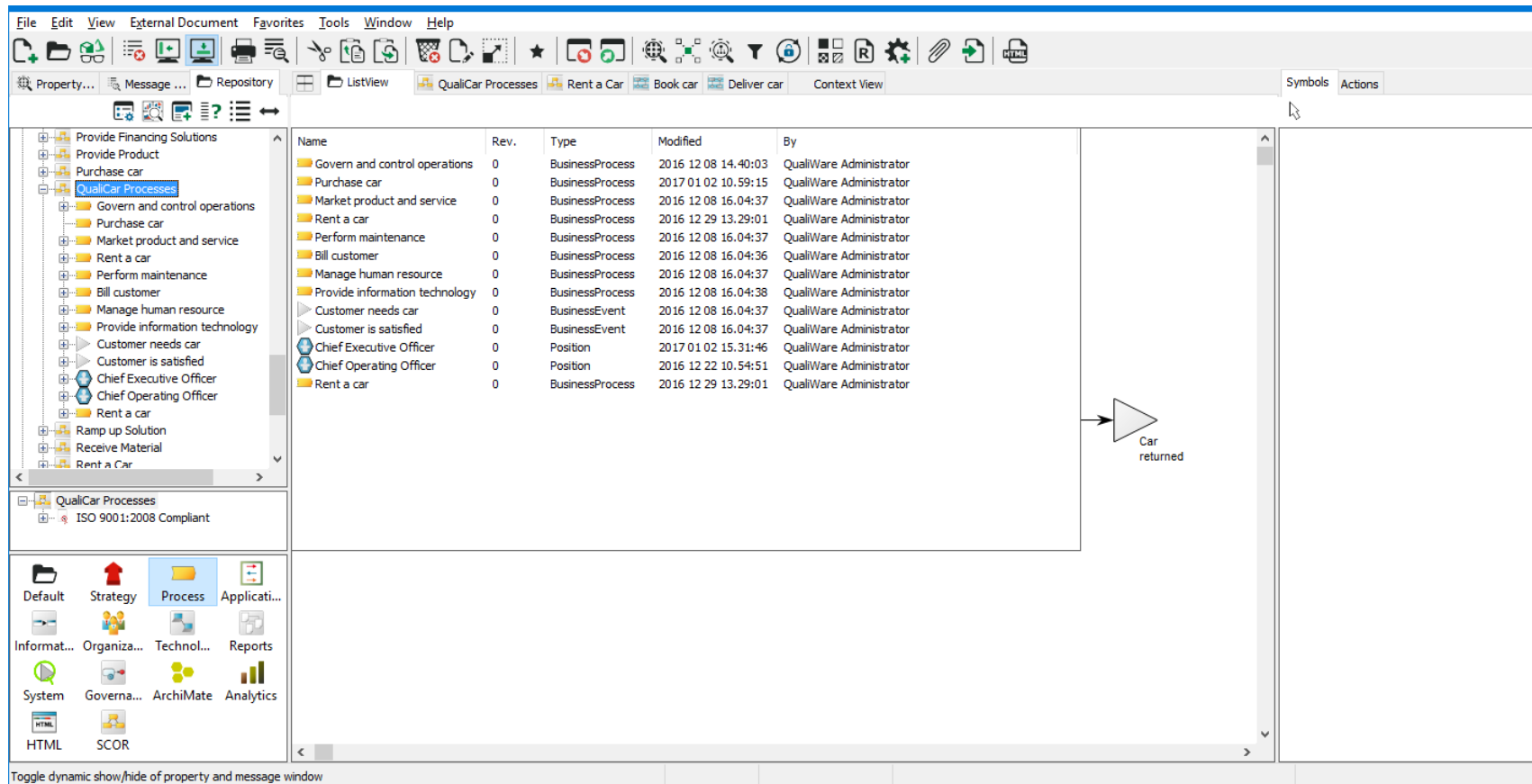
- Focus on the Repository Explorer
- Go to Tools->View Deleted Objects...



# Demo - Advanced Repository Explorer Part 2

# Lesson 9 – Advanced Repository Explorer Part 2

**Purpose:** To understand the structured storage of components (diagrams and symbols) in the repository and learn how to navigate in the stored information. In this exercise we will also learn how to create, change and delete components in a non graphical way.



The screenshot displays the QualiWare Advanced Repository Explorer interface. The left pane shows a hierarchical tree view of components under 'QualiCar Processes'. The main pane shows a table of component details. The right pane shows a diagram of a 'Car returned' symbol.

Name	Rev.	Type	Modified	By
Government and control operations	0	BusinessProcess	2016 12 08 14:40:03	QualiWare Administrator
Purchase car	0	BusinessProcess	2017 01 02 10:59:15	QualiWare Administrator
Market product and service	0	BusinessProcess	2016 12 08 16:04:37	QualiWare Administrator
Rent a car	0	BusinessProcess	2016 12 29 13:29:01	QualiWare Administrator
Perform maintenance	0	BusinessProcess	2016 12 08 16:04:37	QualiWare Administrator
Bill customer	0	BusinessProcess	2016 12 08 16:04:36	QualiWare Administrator
Manage human resource	0	BusinessProcess	2016 12 08 16:04:37	QualiWare Administrator
Provide information technology	0	BusinessProcess	2016 12 08 16:04:38	QualiWare Administrator
Customer needs car	0	BusinessEvent	2016 12 08 16:04:37	QualiWare Administrator
Customer is satisfied	0	BusinessEvent	2016 12 08 16:04:37	QualiWare Administrator
Chief Executive Officer	0	Position	2017 01 02 15:31:46	QualiWare Administrator
Chief Operating Officer	0	Position	2016 12 22 10:54:51	QualiWare Administrator
Rent a car	0	BusinessProcess	2016 12 29 13:29:01	QualiWare Administrator

# Summary

# Summary



- Overview
- Set-up and navigation
- Draw a diagram
- Describe symbols and diagrams
- Linking across diagrams
- External documents
- Organization
- Change Management
- Strategy
- Risk Management
- Problem, Change Request, Complaint, Nonconformity
- Audits
- Analytics

# Course evaluation



**qualiware**<sup>®</sup>  
Enabling positive change

# Extras and Q&A





Thank you