

WHAT TO EXPECT AFTER THE CONVERSION FROM IGX TO IGXW

Instructions, Best Practices, and Considerations for migrating from the iGrafx Desktop to Platform based web diagramming.

The following document has been created to help you migrate smoothly from the iGrafx Desktop modelling tools (i.e. Flowcharter, Process, Process for Six Sigma) to the web-based modeling of the iGrafx Platform. In this paper we will discuss the Instructions for how to convert, best practices for how and when to convert, as well as internal governance and procedures that may need to be updated to support your new environment.

Things to Consider

The current focus of the migration efforts from the desktop based igx files to the platform-based web diagramming should be Process, BPMN, and Basic diagram types. Please note that IGX documents are not modified during or as a result of the conversion, and will appear in the platform as a web diagram as they were in their original igx state.

The following are a few things to review within your documents as you develop your migration strategy.

IGX FILES WITH MULTIPLE DIAGRAMS – Be advised that if an igx document contains two or more diagrams, iGrafx will store the newly-created web diagrams (for that igx document) in a repository folder that will have the same name as the igx document. That folder will initially reside in the same repository location as the original igx document. This implies that these repository items that need to be governed accordingly.

FILES WITH LINKS –

Will be Converted:

- a. Subprocess - For those igx documents that have parent-child (i.e., hierarchical) relationships via activity shapes of type “Subprocess” or “Call Activity”, these linkages are kept on the resulting web diagrams.
- b. Hyperlinks – Links to external iGx references (i.e. web locations) will be kept on the resulting web diagrams.

Will need to be updated:

- a. Hyperlinks that exist in an igx-based diagram that lead to another igx file or igx-based diagram will need to be updated after the conversion to ensure those hyperlinks point to the newly created web diagrams.

Examples where you may have such hyperlinks include, but are not limited to:

- Shape names (labels) that also serve as hyperlinks which enable users to navigate to other igx-based diagrams
 - Links or Hyperlinks that serve as “Back” buttons or “Help” buttons which ultimately lead to an igx-based diagram.
 - Hyperlinks in Dashboards, Dynamic Links, Landing Pages, and/or Reports that lead to igx documents or igx-based diagrams.
 - Links or Hyperlinks on End Events that point to Start Events in a ‘subsequent’ igx-based diagram in a sequence (and vice-versa).
 - “Documented By” relationships in any repository item that lead to igx documents or igx-based diagrams that have been converted to web diagrams.
- b. All “incoming” links that are maintained on external iGrafx systems or other intranet locations that lead the individuals to igx documents or igx-based diagrams (within the iGrafx Platform) must be updated to reflect the newly created web diagrams.

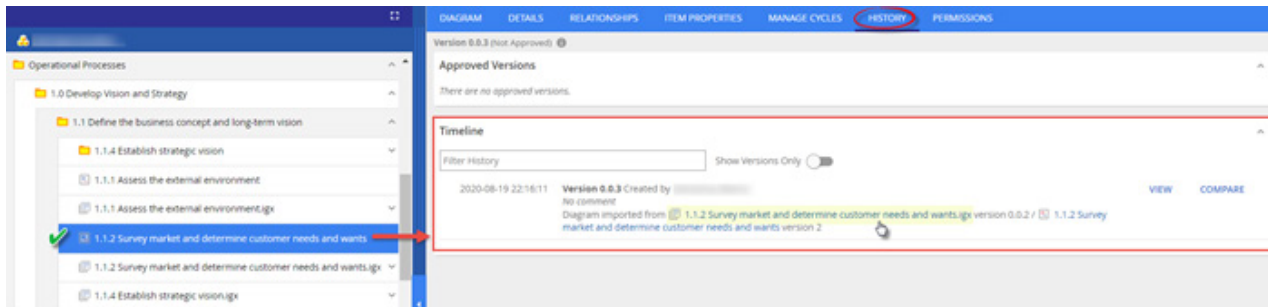
CYCLE MANAGEMENT – If you currently utilize the cycle management capabilities of the iGrafx Platform for your igx files, any approvals will not carry over to the newly created web diagrams. These are new files in the repository and will need to go through their own approval cycle.

- This applies to endorsed and acknowledged igx documents also.
- For this exercise, you may want to leverage the feature in iGrafx that lets you submit multiple web diagrams at once for approval / endorsement. This feature is available via the “Expanded” mode of the repository tree.

DIAGRAM COMPARE – This feature will provide version comparisons between diagrams of the same format. In other words, you will not be able to simultaneously compare a version of a web diagram with a version of an igx diagram.

- Note that once an igx file is converted, you will be able to compare any subsequent versions of the web diagram with the web diagram that represents the ‘last’ version of the igx-based diagram. The history of all the versions of the igx diagrams as they existed pre-conversion, will also still exist within the original igx file.

AUDIT HISTORY – Web diagrams that are created as a result of a conversion will have a 'link' that provides traceability to the original igx document from which they were converted. This link is available via the Timeline section of the History tab of the applicable web diagram, and will enable individuals to quickly navigate to the original igx document for the version history of the diagram. See screenshot below.



REPORTS – If you are currently using the reporting capabilities of the iGrafx Platform that references or filters for igx documents will need to be modified.

- For example, if your Report Filter is set to “type=objectType.DOCUMENT” After conversion it should change to “type=objectType.Web_Diagram”.

Files that should not be converted

There are certain features that are available for igx-based diagrams that are not currently available for web-based diagrams. iGrafx continues to improve our web diagramming capabilities to be in par with our client diagramming features. Some features that are not be currently available in web diagrams include, but are not limited to:

- Simulation
- VSM
- Templates
- Tabular View
- Advanced Shape Numbering
- Cause & Effect
- Comprehensive display of “Fields” on diagram shapes
- FMEA
- Visio Diagram Importing
- Page Setup Watermarks

Documents that contain these components should continue to be maintained via igx documents.

NOTE – As previously stated, if you have igx documents that contain a mixture of diagram types (i.e. Process Maps, VSM, FMEA, etc.) we recommend moving the non-convertible components to new igx documents before converting the igx document.

Some of these features may become available in future releases as we continue to develop our web diagramming functionality and those documents may be converted at that time.

SIMULATION – If you intend on doing advanced analysis and/or process simulation, please continue to use igx-based diagrams for this purpose. Process Simulation is currently not supported via web diagrams.

- If you have a new web-based process diagrams that you want to simulate, iGrafx has a utility that lets you convert web-based diagrams to igx-based diagrams. Please consult with your iGrafx rep for more information on this topic.

Best Practices

You will need to update any existing diagramming standards (documentation) to reflect new procedures and guidelines for web-based diagramming. These may include:

HYPERLINKS – Before converting, it would be good to identify and review any “free-form” links in your igx-based diagrams may have. These that are links that allow for the navigation to locations outside of the iGrafx Platform, such as an external website or an intranet location.

- If you have such links, you should consider updating them to links that are managed via Web Address objects in iGrafx.

TEMPLATES – If you currently use the Template functionality in igx-based diagrams, you should consider creating web-based diagrams that resemble those igx-based templates. As such, you will be able to ‘copy’ these diagrams and used them as a starting point for new web diagrams.

- This may require you to define a new governance procedure for these ‘copy templates’ on the Platform.

CUSTOM SHAPES – If you currently have a custom shape library that is leveraged by igx-based diagrams, you will need to migrate those shapes to the web-based Shape Library functionality of the Platform.

- This may require you to define a new governance procedure for these libraries on the Platform.

DIAGRAMS WITH MULTIPLE FILE TYPES – If you have igx documents that contain a mixture of components (i.e. Process Maps, VSM, FMEA) we recommend moving the non-convertible components to new igx documents before converting the igx document. By doing so, once an igx document is converted, you will be able to ‘sunset’ that igx document into a legacy folder.

LEGACY FILES – After the conversion, we strongly recommend that you move* the converted igx documents to a “legacy” folder so that they do not co-exist with your new web diagrams in the same folder. This will prevent confusion and mitigate the risk of someone modifying the wrong diagram. This is illustrated in the screenshot below:

- When moving multiple igx documents, you may want to leverage the feature in iGrafx that lets you select and move multiple repository items to another location by dragging and dropping. This feature is available via the “Expanded” mode of the repository tree.



Preparing for the migration/conversion

Please note the requirements necessary for any individuals migrating iGX diagrams to web diagrams:

- Designers have been trained on iGrafx Web Diagramming capabilities.
- All files iGx documents currently exist within the iGrafx Platform.
 - Conversion of igx documents can only occur for documents that are already stored in an iGrafx repository on the Platform.
- The individual running the conversion has access to the iGrafx Platform and applicable repository where the applicable igx documents exist.
- The individual running the conversion has the appropriate iGrafx license that allows creation of web diagrams. Below are the licenses that allow creation of web diagrams:
 - VCDA Licenses: Designer, Architect
 - Legacy Licenses: Desktop Connector Plus, BPMN Web Diagrammer, Business Architect, SAP Architect
- The individual running the conversion has appropriate “Add” permission in the folder where the igx documents (to be converted) exist.