

## iGrafx Consulting & Training Module

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## iGrafx® Service & Trainings

### Consulting from Strategy to Implementation

iGrafx combines BPM consulting and innovative software solutions under one roof. With the iGrafx platform we offer a powerful BPM tool that covers the complete BPM lifecycle from process modeling, publishing, governance and document management to monitoring and automation. With our experienced team of consultants, we are happy to support you in examining, streamlining and optimizing your business processes. In doing so, our consultants draw on unique expertise generated by a large number of projects and a deep understanding of the current challenges and needs of our customers. Together with your team, we work on the development of new processes or the improvement of existing processes that you would like to establish using our software and the latest, proven methodologies. The approach is determined by our customers themselves - whether as workshops, training or long-term accompanying project: We are there for you until you have satisfactorily implemented your vision of a success-oriented, flexible and powerful BPM.

### What does iGrafx offer?

- **Process management consulting:** Development of process models, best practices and solutions
- **Product consulting** from our experienced consultants and developers
- **Trainings** with high practical relevance - from professional up to technical process management

### iGrafx Process Management Consulting

Your success is our goal. With the highest professional and methodological competence, we accompany you from the strategy to an efficient, operative implementation. This means that iGrafx does not leave you alone after a short presentation but stays consistently by your side. For us, consulting also means know-how transfer, i.e. our consulting team supports you in introducing process management as an integral part of successful corporate management and accompanies you on this path. This is supported by our 25 years of experience, which we have consolidated and condensed in our knowledge management. On this basis, our specialists then develop process models, best practices and solutions for your requirements.

### The Core Competencies and Consulting Services for Your Successful BPM Project

Have access to this extensive knowledge and know-how. Take advantage of well-thought-out process models and best practices that have been proven in practice:

- BPM know-how transfer
- Strategic alignment of process management derived from the business strategy
- Development of company-specific BPM Governance & BPMN conventions
- Development of the company-specific process map, classic or as customer journey
- Professional workshops and interviews for process survey and process analysis
- Development of appropriate solutions to complex, business-critical processes or problems
- Intelligent development and implementation of end-to-end processes
- Efficient automation of processes
- Competent support in ISO preparations, certifications and audits
- Professional project management
- Outsourcing of process modeling

### iGrafx Product Consulting

Our experienced consultants and developers support you in achieving your goals and building an optimal BPM software solution based on iGrafx. iGrafx Product Consulting combines our world-class iGrafx products with professional technical services. This is how we create a unique added value for our customers.

### The Core Competencies of the Technical Service for Your Perfect Solution

- Creation and implementation of a Proof of Concept (PoC)

- Technical conception of your iGrafx system tailored to the requirements of your company
- Deployment and configuration of your iGrafx management system (in the public cloud, private cloud or on-premises)
- Setup of user administration and management cycles
- Automatic transfer of data from third-party systems
- Customizing-Services (on request)
- Implementation of iGrafx solutions (ISO standards, GDPR, ROPE™ solution, Audit Management)
- Performing process automation
- Technical support
- Application support (1st-3rd level support)

### **iGrafx Trainings**

Take advantage of our training courses and trainings with high practical relevance to relevant BPM and iGrafx topics. iGrafx offers you a portfolio of content and didactic high-quality trainings - from functional to technical process management, conducted by experienced trainers. Create optimal conditions for you and your employees for a fast and successful project implementation.

#### **Learning Objectives**

- Understanding and correct application of the method(s) and iGrafx
- Mastery of the relevant tools and functions, tailored to different user groups
- Applying Best Practices

## Overview Module Descriptions

### BPM Consulting

#### BPM Methodology for Management

##### Goals and Benefits

Know-how transfer regarding business process management as a management method. Acquisition of a common methodological understanding of process management, principles and all the foundations for successful BPM.

##### Target group

1. + 2. Management Level, Process Owners and Process Responsibles, Process Managers

##### Content

- ✓ What is BPM? BPM means more than just painting "processes"!
- ✓ Business Management
  - BPM is embedded in Business Management and not just an aspect
- ✓ Other management disciplines include Compliance, Risk and Performance Management
- ✓ Definition BPM - Goals and Benefits of BPM
- ✓ Strategic & Operational BPM
- ✓ BPM architecture
  - 4/5 Process Hierarchy - Structural Architecture (Process cutting)
- ✓ BPM Organization & Role-Responsibilities
- ✓ Skills/Skills-Competencies
- ✓ BPM Documentation & Process Profiles
- ✓ BPM Convention
- ✓ Process Life Cycle
- ✓ Monitor, analyze, optimize BPM
- ✓ Best Practice BPM Introduction

##### The module contains

- Preparation / Post-Processing Time
- Workshop on site / Remote

##### Requirements

- none

## Conventions Workshop

### Goals and Benefits

Together with you on site, we will develop a process method guideline. You will receive a guideline individually for your company, for process management with the essential contents for process documentation and process modeling as well as the visualization in diagrams.

### Target group

Chief Process Officer, Process Architect

### Content

- ✓ Determining which objects are required
  - Strategy, Requirements, Process, Risks, etc.
- ✓ Specifying Naming, Hierarchy, Attributes, Relationships, Customer Relevant Customization
- ✓ Working out the Conventions for Process Diagrams Naming, BPMN 2.0 Standards, Templates
- ✓ Documentation in iGrafx repository (Cloud adds additional costs)
- ✓ Documentation of the conventions guide as well as a short manual for modeling in post-processing possible (additional days after estimation of effort)

### The module contains

- Preparation / Post-Processing Time
- Workshop on site
- Documentation in repository

### Requirements

- iGrafx Convention Repository
- Training Business and Process Modeling with iGrafx

## Develop Process Map / Process Landscape

### Goals and Benefits

Together with you on site we develop your individual process map with process levels 0-3 for your company.

### Target group

Chief Process Officer, Process Architect, Process Owner

### Content

- ✓ Creation of a company-specific Process Map
- ✓ Developing the various processes for the Process Levels 0-2
  - Process Map (Level 0), Main Processes (Level 1), Processes (Level 2)
- ✓ Document the results and create the Process Map in the BPM Tool

### The module contains

- Preparation / Post-Processing Time
- Workshop on site
- Documentation

### Requirements

- Training Business Modeling with iGrafx
- Process Modeling with iGrafx
- BPM(N) conventions are defined



## Elaborate Process Roles & iGrafx User Roles

### Goals and Benefits

Together with you on site we develop a uniform BPM Role, Responsibility & User Concept, individually for your company based on the BPM methodology and your company structure.

### Target group

Chief Process Officer, Process Architect

### Content

- ✓ Development of a Process Role Concept for your company
- ✓ Develop the iGrafx System roles (User-Access-Rights)
- ✓ Definition of all responsibilities in BPM (including RACI)
- ✓ Creation of an Organization & User Matrix for BPM and iGrafx

### The module contains

- ☒ Preparation / Post-Processing Time
- ☒ Workshop on site
- ☒ Documentation

### Requirements

- ☒ Training Business Modeling with iGrafx
- ☒ Training Process modeling with iGrafx
- ☒ BPM(N) conventions are defined

## Conduct Process Surveys

### Goals and Benefits

On site, our consulting team supports you with your AS-IS-Process Surveys or Process Audits for Process Levels 3 + 4 (Sub-processes & Activities), as well as process evaluation and TO-BE-Process creation.

### Target group

Process Manager, Process Responsibles, Responsibles for Implementation, Implementing Person

### Content

- ✓ Conducting workshops and interviews for Process Survey, Documentation of the AS-IS-Processes
- ✓ Evaluation of the AS-IS-Processes
- ✓ Representation of Optimization Potentials
- ✓ Creation of TO-BE-Processes
- ✓ Systemic Process Preparation and Documentation for the internal Process Review and Release process
- ✓ Documentation of the conducted Process Surveys and Results

### The module contains

- Preparation / Post-Processing Time
- Workshop / Interviews on site
- Documentation

### Requirements

- Process Survey Methodology is defined

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## Perform Process Documentation & Visualization

### Goals and Benefits

On site, our consulting team supports you with the documentation and visualization of your processes.

### Target group

Process Manager

### Content

- ✓ Documentation of the process contents
- ✓ Create process description
- ✓ Creation & Visualization of the processes as BPMN diagrams

### The module contains

- Preparation / Post-Processing Time
- Workshop / Interviews on site
- Documentation

### Requirements

- BPM(N) conventions are defined

## Process Automation - Develop & Implement Human Workflow

### Goals and Benefits

You will learn about the importance and potential of process automation and the path from model to executable process. Together we will analyze on site the degree of automation of the process to be implemented as well as the evaluation and recommendation which processes/work steps could be automated and to what extent. This is followed by the scoping & conception phases of the processes to be implemented as a human workflow.

### Target group

Process Owners and Process Responsibles, Process Managers, Digital Transformation Managers

### Content

- ✓ Performing the scoping phase
  - Recording of all company-specific requirements
  - Analysis of the process for its degree of automation (manual, IT supported, automated)
  - Evaluation of the process with regard to its automation capabilities
  - Documentation of the results and creation of a recommendation for action for process automation
- ✓ Conceptualization phase
  - Creation of a specification of the requirements process diagram & mockups
  - Evaluation of the requirements for feasibility by iGrafx
  - Review and release of the feasible specification or change requests
- ✓ Implementation phase (after cost estimate of the conception phase)
  - Implementation of the requirements
  - Review and UAT
  - Release of the conversion

### The module contains

- Preparation / Post-Processing Time
- Workshop / Interviews on site
- Documentation
- Implementation only after cost estimate Conception phase

### Requirements

- Process architecture is ready
- BPM(N) conventions are defined
- iPA server is installed
- Training Process Modeling with iGrafx

## Perform Process Analysis & Optimization

### Goals and Benefits

On site we analyze your processes of process levels 3 + 4 and jointly develop the optimisation potential of your company. You will receive a meaningful action plan for process optimization and the realization of the optimization potential.

### Target group

Process Managers, Process Responsibles, Implementation Managers, Business Analysts

### Content

- ✓ Process analyzes of the processes of level 3 + 4
- ✓ Development of optimization potentials
- ✓ Calculation of the optimization potential
- ✓ Preparation of an action plan/recommendation for action, quick-win, short-medium-long term
- ✓ Creating the requirements for change management
- ✓ Documentation of the result & recommended action for process optimization

### The module contains

- Preparation / Post-Processing Time
- Workshop / Interviews on site
- Documentation

### Requirements

- none

## Enterprise Review

### Goals and Benefits

After about 6 weeks, we will on the basis of a new round of feedback work with you to develop a so-called improvement plan on how you can further optimize the benefits of iGrafx. For this purpose, we carry out weak point analyzes and identify possible sources of problems. Subsequently, we will assist you on site to eliminate and optimize your modeling project.

### Target group

Process Responsibles, Process Modeler, Responsible for BPM introduction

### Content

- ✓ Execution of a feedback round
- ✓ Performing a vulnerability analysis
- ✓ Creation of an optimization plan
- ✓ Support during the implementation of the optimization

### The module contains

- Preparation / Post-Processing Time
- Workshop / Interviews on site
- Documentation

### Requirements

- Ongoing installation and initial independent experiences

## Independent Review Workshop

### Goals and Benefits

We will work out the agreed contents together with you.

### Target group

Depends

### Content

Depends

## Independent Consulting

### Goals and Benefits

Together with you, we will work out the corresponding agreed topics.

### Target group

iGrafx Customers

### Content

Advice and support in the processing of your topics according to the respective agreement.

## Technical Consulting

### Create a Proof of Concept

#### Goals and Benefits

Based on your interest in our solutions and your associated questions, minimum requirements and possible exclusion criteria, we prepare a customer-specific "proof of concept" across departments. With this we want to ensure that iGrafx meets your wishes and requirements and that the necessary tasks can be accomplished with the help of our solutions. If you are interested in our solutions, the required products and services will be agreed with you and the individual modules can then be ordered.

#### Target group

Project Manager BPM Introduction, Process Owner and Process Responsibles, Process Manager

#### Content

- ✓ Creation of a customer-specific "Proof of Concept"
- ✓ Implementation of the concept in the iGrafx Platform
- ✓ Presentation of the implementation
- ✓ Practical exercises in the iGrafx Platform

#### The module contains

- Preparation / Post-Processing Time
- Workshop / Interviews on site
- Documentation

#### Requirements

- none

## iGrafx Platform Implementation

### Goals and Benefits

iGrafx supports you individually during the installation of iGrafx. In this way, any queries that may arise can be answered more quickly and the installation is able to proceed more quickly.

Technical support & implementation, follow-up / documentation.

### Target group

IT Application Manager

### Content

- ✓ Clarification of system requirements and installation instructions.
- ✓ Determination of the date of installation - If necessary we install the software together with you on site.
- ✓ After a successful installation and configuration of all necessary components, we will document the result and "hand over" a ready-to-use software to you.
- ✓ Regarding the installation, we expect you to compare the existing hardware and software components with our technical requirements in order to ensure a smooth process.
- ✓ A pROPE™ solutionr operation of the products cannot be guaranteed in case of deviations from these minimum requirements.
- ✓ Support in setting up AD, and/or Single Sign on access authorizations.
- ✓ In case of iGrafx Cloud Installation, this is provided by iGrafx

### The module contains

- Preparation / Post-Processing Time
- Implementation
- Documentation

### Requirements

- Checklist Technical Implementation is filled out



## iGrafx Platform Upgrade

### Goals and Benefits

Installation of the current version, security patches, new functionalities

### Target group

iGrafx customers with old versions, IT Application Manager

### Content

- ✓ Saving the data and settings of the installed version
- ✓ Installing the current version
- ✓ Restoring the configuration for AD, Single Sign On and SSL

### The module contains

- Preparation / Post-Processing Time
- Execution
- Documentation

### Requirements

- none

## Migration from Process Central to the iGrafx Platform

### Goals and Benefits

A supported version, more recent security patches, latest functionality

### Target group

iGrafx customers with old versions, IT Application Manager

### Content

- ✓ Migration from Process Central to the iGrafx platform
- ✓ Support for setting up AD, and/or Single Sign on access authorizations
- ✓ Adapting the infrastructure for the new platform

### The module contains

- Preparation / Post-Processing Time
- Execution
- Documentation

### Requirements

- none

## Data Exchange Services (iGrafX Data I/O)

### Goals and Benefits

iGrafX Data I/O is an Excel add-in designed to interface between Excel and some of the reporting and object manipulation features of the iGrafX platform.

It uses the platform's REST API. This tool allows our customers to upload mass upload objects to a platform installation, for example.

### Target group

iGrafX customers with old versions, IT Application Manager

### Content

- ✓ Easy connection of Excel for reporting and upload functions
- ✓ Report and object manipulation functions (Add/Delete/Update)

### The module contains

- Preparation / Post-Processing Time
- Execution on Site
- Documentation

### Requirements

- iGrafX API

## Data Exchange Services (iGrafX Data Integration Tool)

### Goals and Benefits

We support our customers with the migration of data to the iGrafX platform. Using a powerful graphical tool (iGrafX Data Integration Tool) to create and analyze data flows.

### Target group

iGrafX customers who transform and load data from/to the iGrafX platform or from the 3rd parties.

### Content

- ✓ Simple connection of the third party systems
- ✓ Transformation and analysis of data flows
- ✓ Access to the iGrafX REST API
- ✓ Load Performance Indicator Data into the iGrafX Platform
- ✓ Automatic data reconciliation
- ✓ Use of the Windows task scheduling

### The module contains

- Preparation / Post-Processing Time
- Execution
- Documentation

### Requirements

- It was determined which data should be migrated and from which third-party systems

## iGrafx Automation Server (iPA) Installation

### Goals and Benefits

Installation of the iPA Server

### Target group

iGrafx customers who have iPA, IT Application Manager

### Content

- ✓ Deployment of the iPA server (Cloud + On-Premises)
- ✓ System requirements and installation instructions
- ✓ Creating the clients - LDAP connection

### The module contains

- ☒ Preparation / Post-Processing Time
- ☒ Execution on site/ Remote
- ☒ Documentation

### Requirements

- ☒ none

## iGrafx ROPE™ Solution™ Installation

### Goals and Benefits

Setting up an iPA server for iGrafx ROPE™ Solution™ . Configuration of the user and groups as well as the required resources. Execution of a test phase for iGrafx ROPE™ Solution™ and iGrafx connection.

### Target group

Administrator for iGrafx, Application Manager (IT)

### Content

- ✓ Clarification of the system configuration
- ✓ Determination of an Installation-Date, If necessary, we will install the iGrafx ROPE™ solution™ together with you on site.
- ✓ After successful installation and configuration of all required functionalities, we document the result and "hand over" a ready-to-use software to you.

### The module contains

- ☒ Preparation / Post-Processing Time
- ☒ Execution on site / Remote
- ☒ Documentation

### Requirements

- ☒ iGrafx iPA Server
- ☒ iGrafx PRC Modul
- ☒ iGrafx ROPE™ Solution Trainings

## iGrafx Trainings

### Platform Administration with iGrafx

#### Goals and Benefits

During the training, the administrator/application manager learns the functionalities and practical handling of the administrative areas of iGrafx.

Participants will be able to independently administer the iGrafx platform and make configuration changes to meet user requirements.

#### Target group

Platform Administrator

#### Content

- ✓ Overview iGrafx platform architecture and modules
- ✓ Server Administration
- ✓ Repository Administration and Configuration
- ✓ User and Group Administration
- ✓ Roles and rights assignment
- ✓ E-mail function management
- ✓ IT administration (e.g. log analysis, rest API, ...)
- ✓ Support, license management

#### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

#### Requirements

- iGrafx platform has been implemented

## BPMN 2.0

### Goals and Benefits

In the course of the training, the participants learn all basics of the BPMN 2.0 modeling conventions as well as the practical handling of the BPMN convention.

These skills enable the participants to use the BPMN methodology effectively and beneficially for your company.

### Target group

Process Designer, Process Owner

### Content

- ✓ Basics of BPMN 2.0
- ✓ Basics of the BPMN Convention & Symbols
- ✓ Pools and Lanes
- ✓ Symbol types and their meaning Activities, Branches, Events
- ✓ Line types and their meaning
- ✓ Border Line Activities
- ✓ Modeling of processes in BPMN
- ✓ Execution of exercises

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- If no BPMN 2.0 knowledge is available, this module should take place before process modeling with iGrafx

## Process Modeling with iGrafx FlowCharter

### Goals and Benefits

During the training, the participant learns how to create graphical models in iGrafx. The functionalities of iGrafx FlowCharter will be presented and implemented with practical examples. The skills taught will enable you to create different types of diagrams and enrich them with content to achieve the desired presentation efficiently.

### Target group

Process Designer, Process Analyst

### Content

- ✓ Introduction to iGrafx
- ✓ Creating a process diagram
- ✓ Creating more complex process diagrams
- ✓ Overview Data Entry, Hierarchies and Document Management
- ✓ Table view
- ✓ Input and output
- ✓ Other diagram types

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- iGrafx FlowCharter - License

## Process Modeling with iGrafx

### Goals and Benefits:

The participant learns, in practical handling, all functions of the iGrafx web interface, which are needed to generate web diagrams.

After the training the participants are able to create process flow diagrams in the iGrafx platform.

### Target group

Process Designer, Chief Process Officer, Process Architect, Process Owner, Process Analyst

### Content

- ✓ Introduction to the Origins Platform (Short excursion BPMN Convention - Which kind of Shapes are there in BPMN?)
- ✓ Practical exercises in BPMN (creating BPMN diagrams, activities, sub-processes)
- ✓ Creating a navigation page (creating links, describing relationships) Introduction to object-based modeling
- ✓ Connecting resources
- ✓ Describing processes

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- iGrafx Designer - License
- iGrafx Platform Viewer Training
- Document Management with iGrafx

## iGrafx Platform Viewer Training

### Goals and Benefits

In the course of the training, the participant learns all functionalities for a simple user. The skills taught will enable you to use the iGrafx Platform effectively and beneficially in your company. Getting to know the user interface and the functions ensures increased acceptance.

### Target group

Process Team Member, Documentation Specialist, Chief Process Officer, Process Architect, Process Designer, Process Owner, Process Team Member, Process Analyst

### Content

- ✓ Introduction to navigation (dashboards, navigation pages, navigation tree)
- ✓ Introduction to the personal profile (language settings, view mode), "My tasks"
- ✓ Introduction to the procedures (review, approve, confirm)
- ✓ Overview of: Search, Filter

### The module contains

- Preparation / Post-Processing Time
- Training on site/ Remote
- Documentation

### Requirements

- User-License



## Business Modeling with iGrafx

### Goals and Benefits

During the training the participant will learn the functionalities of business modeling with iGrafx. All aspects of business architecture are covered. The participants will be enabled to map even complex interrelationships of the business architecture independently.

### Target group

Process Architect, Chief Process Officer, Process Owner

### Content

- ✓ Introduction to Business Modeling with object libraries
- ✓ Introduction to the Meta-Model
- ✓ Creation of a business model (Strategy, Requirements, Work results)
- ✓ Linking to Process Diagrams
- ✓ Creation of business models with (KPI, Risk, Control)
- ✓ Practical exercises are carried out on the respective topics

### The module contains

- ☒ Preparation / Post-Processing Time
- ☒ Training on site / Remote
- ☒ Documentation

### Requirements

- ☒ Training Platform Viewer
- ☒ Training Document Management with iGrafx
- ☒ Training Process Modeling with iGrafx
- ☒ Architect-License

## Process Optimization with Simulation

### Goals and Benefits

During the training, the participant learns the functionalities of process optimization by simulation, as well as the practical handling of iGrafx-Process Simulation.

### Target group

Process Analyst, Process Designer

### Content

- ✓ The benefits of Process Simulation
- ✓ The Modeling Environment
- ✓ Setup of the Simulation Generators (Resources, Calendar, Attributes, Functions, Monitors)
- ✓ Creation of an example model
- ✓ Create "what-if" Scenarios
- ✓ Generation of Simulation Reports for evaluation

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- iGrafx - Process - License
- Process Modeling with iGrafx FlowCharter
- none

## Process Optimization with Six Sigma

### Goals and Benefits

During the training the participant learns the functionalities of process simulation with the Six Sigma extension. (DOE with processes). In addition, the possibilities of the interface to MINITAB® or JMP (exchange of data and functions) are taught. An introduction to the Process Analyzer provides further possibilities for process-related calculations.

### Target group

Process Designer, Process Analyst

### Content

- ✓ When is process optimization with Six Sigma used?
- ✓ Learning how iGrafx interacts with MINITAB® or JMP
- ✓ Learning the quick design of experiments and scenarios (RapidDOE)
- ✓ Create records of Transaction Output Data
- ✓ Transfer of simulation results to the statistical tools (MINITAB®/JMP)
- ✓ Further analyzes such as Rolled-throughput-Yield and Critical-Path-Analysis etc.

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- iGrafx – Process for SixSigma – License
- MINITAB® or JMP
- Training Process Modeling with FlowCharter, Process Optimization with Simulation

## Reports and Dashboards with iGrafx (PRC)

### Goals and Benefits

Dashboards can be used both for target group-oriented Entry-Pages and for KPI presentation to management. Reports can clearly present complex interrelationships of the models. Both functionalities allow the greatest possible benefit to be derived from collected data.

### Target group

Process Architect, Chief Process Officer, Process Owner

### Content

- ✓ Introduction to Reports and Dashboards
- ✓ Generating Reports (Report Types, the IQL script language, Effects of Rights)
- ✓ Creating Dashboards (Simple Dashboards, Performance Dashboards, Advanced Dashboards)

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- Architect-License
- Training Business Modeling with iGrafx

## Document Management with iGrafx

### Goals and Benefits

During the training the participant learns the functionalities of document management and the practical handling in the iGrafx Platform. Audit-proof filing and auditable versioning and the handling of the procedures (e.g. review or release) are taught in a practical way.

### Target group

Chief Process Officer, Documentation Specialist, Process Architect, Process Designer, Process Owner, Process Analyst

### Content

- ✓ Basics about document management in the iGrafx Platform
- ✓ Handling of Documents in the platform (Download/Upload, Checkout/Checkin, File display in the Platform)
- ✓ Overview of the possible procedures
- ✓ Management of Access Rights
- ✓ Performing practical exercises with documents in the iGrafx Platform

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- Platform Viewer Training

## Valuestream Mapping with iGrafx FlowCharter

### Goals and Benefits

During the training the participant learns the functionality of the value stream diagram support of the iGrafx FlowCharter. The creation of diagrams, the setup of lean parameters and the automatic calculation of the required key figures, as well as the customizing of diagrams. In addition, the other support diagrams of the Lean Six Sigma Building Kit will be presented briefly. Typically, this is followed by the modeling and adaptation of a customer example.

### Target group

Process Designer, Process Analyst

### Content

- ✓ Define Value Stream Design
- ✓ Set up / create Lean-Data
- ✓ Customize Symbol Palettes / Toolbar
- ✓ Hierarchy / Rollup / Document Components
- ✓ Creating templates
- ✓ Import / Export
- ✓ Lean Six Sigma Toolbox
- ✓ Workshop (Customer Examples and F&A)

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- iGrafx FlowCharter is installed
- Training Process Modeling with FlowCharter

## Performance Management with iGrafx

### Goals and Benefits

During the training, the participant learns the functionalities of iGrafx Performance Management.

The participants will be able to create and manage performance indicators and to combine them in charts. Different ways of displaying the indicators are taught, as well as how to prepare the indicators in dashboards for the management circles in the company.

### Target group

Performance Manager, Chief Process Officer, Process Owner

### Content

- ✓ Overview of iGrafx performance features
- ✓ Create and Configure Performance Indicators (Setting options, Data Entry, Customize Graphical Chart)
- ✓ Set access rights
- ✓ Representation of several Performance Indicators in Diagrams/Charts
- ✓ Integrating PIs into Dashboards
- ✓ Overview of the possibilities for Automated Data Reconciliation
- ✓ Carrying out practical exercises

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- Training Business Modeling with iGrafx, iGrafx PRC Modul

## Process Maturity Management with iGrafx

### Goals and Benefits

In the course of the training, the participant learns the functionalities of Maturity Management and the practical use of iGrafx. iGrafx Maturity Management can help you to use iGrafx BPM effectively and profitably in your company.

### Target group

Chief Process Officer, Process Architect

### Content

- ✓ Goals and strategies of process maturity as well as corporate maturity - "One way to the goal with iGrafx"
- ✓ Examples of methods - iPEMM, BPMM, CMMI, EDEN
- ✓ Objects for Process-Maturity
  - Business objects
  - Diagrams
  - External files
- ✓ Managing the maturity
  - Awareness, responsibility, culture, ownership, benefit
- ✓ Example implementation
  - Short independent exercise execution to create your own implementation
- ✓ Refinement / Tooling:
- ✓ Evaluation, Transparency, Control, Management

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- Training Business Modeling with iGrafx

## Strategy Management - BSC with iGrafx

### Goals and Benefits

During the training the participant will learn about the iGrafx functionalities Strategy and Balance Score Card, as well as the practical handling of these in iGrafx. The skills taught will enable you to effectively and profitably apply iGrafx Strategy Management in your organization.

### Target group

Strategy Manager, Chief Process Officer

### Content

- ✓ How does iGrafx support me in my Strategy Management?
- ✓ Introduction to the Navigation of iGrafx
  - Dashboard
  - Navigation Page
  - Navigation Tree - Overview of the functionalities of the iGrafx Strategy Area
- ✓ How do I create the Strategy Perspectives?
- ✓ How do I create long-term Strategy Goals?
- ✓ How do I create Operational Process Goals?
- ✓ Learning how to Map Goals and Responsibilities
- ✓ What reports or strategy matrix are available in iGrafx?
- ✓ Performing practical exercises

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- Training Business Modeling with iGrafx, iGrafx PRC Modul



## Risk Management with iGrafx

### Goals and Benefits

iGrafx's Risk Management capabilities help you to meet your compliance requirements. During the training the participant learns the functionalities of iGrafx Risk Management and the practical use of iGrafx. The skills taught will enable you to use iGrafx Risk Management effectively and beneficially in your organization.

### Target group

Risk Manager, Process Owner

### Content

- ✓ Introduction to iGrafx Navigation (Dashboard, Navigation Page, Navigation Tree),
- ✓ Overview of the iGrafx Risk Management functionalities (Risk Catalogue, Risk Instance, Risk Indicators, Risk Evaluations, Risk Matrix)
- ✓ Assign Risk Instances to objects such as processes, strategies, impact and probability
- ✓ Carrying out practical exercises

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- Training Business Modeling with iGrafx
- iGrafx PRC Modul

## Compliance Management with iGrafx

### Goals and Benefits

iGrafx's Compliance Management capabilities help you to meet your compliance requirements. During the training the participant learns the functionalities of iGrafx Compliance Management and the practical handling of iGrafx. The skills taught will enable you to use iGrafx Compliance Management effectively and beneficially in your company.

### Target group

Compliance Manager, Process Owner

### Content

- ✓ Introduction to iGrafx Navigation (Dashboard, Navigation Page, Navigation Tree),
- ✓ Overview of iGrafx Compliance Management functionalities (requirements, links to other business objects)
- ✓ Use of frameworks (e.g. ISO standards)
- ✓ Carrying out practical exercises

### The module contains

- ☒ Preparation / Post-Processing Time
- ☒ Training on site / Remote
- ☒ Documentation

### Requirements

- ☒ Training Business Modeling with iGrafx
- ☒ iGrafx PRC Modul

## SAP Modeling with iGrafx

### Goals and Benefits

In the course of the training, the participant gets to know the modeling functionalities of iGrafx SAP®.

It enables you to get the most business value from your SAP® implementation. How? By ensuring alignment with your business and minimizing time and cost of upcoming or ongoing SAP® projects.

### Target group

Process Manager, SAP Application Manager, SAP Solution Manager

### Content

- ✓ Introduction to iGrafx Navigation (Dashboards, Navigation Pages, Navigation Tree)
- ✓ Overview of the iGrafx SAP functionalities
- ✓ Bidirectional integration with SAP Solution Manager
- ✓ Creation & Editing of SAP Blueprint projects
- ✓ Harmonization of SAP processes with the Corporate Process Landscape
- ✓ Modeling of SAP-Processes SOA Modeling
- ✓ Execution of practical exercises

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- iGrafx for SAP is installed

## Compliance Management - GDPR

### Goals and Benefits

During the training, the participant learns about the requirements of GDPR as well as the implementation in iGrafx with all functionalities and the practical handling. It will be shown what you must do for GDPR compliance and how iGrafx supports you in this. The skills taught will enable you to implement GDPR effectively with iGrafx and to use it beneficially in your company. Implementation of GDPR content.

### Target group

Risk Manager

### Content

- ✓ Why GDPR?
- ✓ What challenges do I have as a company?
- ✓ What do I have to do to be compliant?
- ✓ Implementation of the GDPR Content
- ✓ Introduction to iGrafx navigation
  - Dashboard
  - Navigation Pages
  - Navigation Tree
- ✓ Overview of the possibilities of mapping GDPR in iGrafx objects
- ✓ What options do you have for analysis in iGrafx?
- ✓ How do you create Rules in iGrafx?
- ✓ How do you create a Risk Matrix or Reports in iGrafx?
- ✓ How do you create an action plan for Rule Compliance?

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- Training Business Modeling with iGrafx
- iGrafx PRC Module
- GDPR Content is imported

## Process Automation with iGrafx - iPA Collaborator

### Goals and Benefits

Here you learn how to process your tasks with the ToDo Client. Process phases and process models are explained using practical examples. The training helps the user who is a participant in running workflows and has to complete the tasks contained therein, how to handle the iPA user interface.

### Target group

Workflow Specialist

### Content

- ✓ Overview iPA
- ✓ Phases of a process
- ✓ Deployment
- ✓ iPA Clients (Roles, Groups)

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- Process Modeling with iGrafx
- BPM(N) Conventions are defined

## Process Automation with iGrafx - iPA Administrator

### Goals and Benefits

Here you will learn everything about user management and resource management. Email sending and the control of permissions (matrix rules) will be shown here and worked out together in exercises.

### Target group

Workflow Specialist

### Content

- ✓ Overview iPA
- ✓ Deployment
- ✓ iPA Clients (Roles, Groups)
- ✓ User-Management
- ✓ Resource-Management
- ✓ Email- und Timer-Konfiguration

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- Training Process Automation with iGrafx - iPA Collaborator
- Process Modeling with iGrafx
- BPM(N) Conventions are defined

## Process Automation with iGrafx - iPA Designer

### Goals and Benefits

Here the participant learns more about workflow design and section handling. Using section handling, the authorizations for the accompanying form are controlled. This allows different user groups to view or edit the fields relevant to them. You will learn how to create simple Smart Form structures and how to combine HTML and CSS.

### Target group

Workflow Specialist

### Content

- ✓ Overview iPA
- ✓ Phases of a process
- ✓ Deployment
- ✓ Process Modeling for iPA
- ✓ Automation-Parameters
- ✓ Mailnode
- ✓ Smartform (xml-sectionhandling)
- ✓ ActionHandler

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- iPA Server
- Training Process Automation with iGrafx - iPA Collaborator
- Training Process Modeling with iGrafx
- BPM(N) Conventions are defined

## Process Automation with iGrafx - iPA Developer

### Goals and Benefits

Together with the other participants practical examples will be implemented. After the training, developers will be able to build complicated Smartforms and Action Handling for their workflows. The use of JavaScript and development of new functionalities for the Smartform are part of the training.

### Target group

Workflow Specialist

### Content

- ✓ iPA Clients (Roles, Groups)
- ✓ Mailnode
- ✓ Advanced Smartform (xml-sectionhandling)
- ✓ ActionHandler
- ✓ iGrafx Rest-API und iPa Requests

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- iPA Server
- Training Process Automation with iGrafx - iPA Collaborator
- Training Process Automation with iGrafx - iPA Designer
- Training Process Modeling with iGrafx
- BPM(N) Conventions are defined



## iGrafx Data Integration Training (ETL)

### Goals and Benefits

Together with the participants of the training we will get to know a simple graphical tool to create or analyze data flows.

### Target group

iGrafx Customers

### Content

- ✓ What is Data Integration/ETL?
- ✓ Database connection(s)
- ✓ Frequent inputs
- ✓ Lookups and Joins
- ✓ Error handling
- ✓ Filter Data
- ✓ Logging/Debugging
- ✓ Create Performance Indicator
- ✓ Upload Performance Indicator via REST
- ✓ Create objects via REST API
- ✓ Let transformations/Jobs start automatically

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- Training Business Modeling with iGrafx, PRC & iGrafx API License
- PC/Laptop/Server with Java installed and admin rights

## Risk Management with iGrafx ROPE™ Solution

### Goals and Benefits

ROPE™ solution stands for Risk & Opportunity Process Excellence. This means that risks can not only be recorded but can even be directly assessed and monitored with the customized workflow. With the help of workflow-supported risk submission, the vast intelligence of the company can be used, because all employees participate in identifying risks. The risk manager can now assess the risk and integrate it into the Global Process Landscape.

### Target group

Risk Manager

### Content

- ✓ Installation of a human workflow for Risk Identification and Action Handling
- ✓ Automatic determination of Risk Values
- ✓ Possibility of linking risks to business processes
- ✓ Extensive evaluations and analysis options for identifying Optimization Potentials

### The module contains

- Preparation / Post-Processing Time
- Training on site / Remote
- Documentation

### Requirements

- License