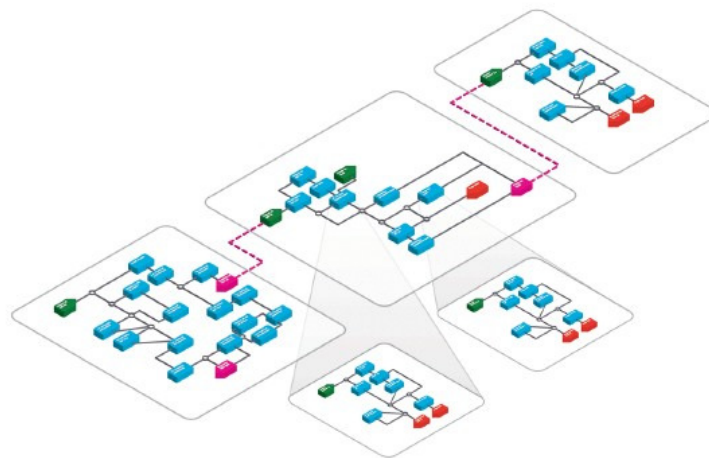


CASEWISE Corporate Modeler Training Courses



Presented by:
Solution Architecture



CONFIGURATION MANAGEMENT

Doc ID:	Sol Arch Courses Outline 002	Issue Date	2009/09/01
Author:	C.F. van Zyl	Status	
File Name:	Sol Arch Courses Outline		

Table of Contents

Description	Page Number
1. Introduction	3
2. Foundation Training	3
2.1. The Foundation Course curriculum (Summary);	3
2.2. The Foundation Course curriculum (Detailed Description);	3
3. Advanced Training	6
3.1. Automodeler	6
3.2. HTML and MS Word Publication.....	6
3.3. Meta Model Extensions.....	7
3.4. Simulation	7
4. Foundation Training - Certificate	8

Please note that we do our best to keep the training material up to date and relevant. The course outline might therefore be slightly different from the actual training material.

1. Introduction

Two basic types of course are presented by Solution Architecture; Foundation and Advanced courses. Solution Architecture is an accredited competency centre of Casewise and is the sole provider of Casewise Training in Southern Africa. Courses are attendance courses only. We do however provide certification by means of assessment, on request.

2. Foundation Training

The Foundation Course is typically a three (3) day course and can be conducted at one of our venues or the client venue. The course deals with the native functionality of Corporate Modeler and provides the ideal opportunity to try and test the toolset in an controlled environment – we typically encourage delegates to get as much as possible exposure to the functionality of the toolset to ensure a level of comfort with Corporate Modeler that will enable them to model with confidence once the course has been completed.

Training is done on client infrastructure (Laptops) which has the benefit that once the delegate has completed the course, leaves the training with a completed model on his/her machine which can always be referenced in future.

2.1. The Foundation Course curriculum (Summary);

- Modeling Principles
- Working with objects in the knowledge repository
- Diagramming techniques
- Reporting
- Good modelling practice
- Introduction to Importing and exporting data to and from MS Excel using Automodeler
- Creating a MS PowerPoint slideshow from a Model using Automodeler
- Introduction to creating HTML and MS Word publications from a model using Corporate Publisher
- Introduction to business process simulation

2.2. The Foundation Course curriculum (Detailed Description);

1. **Introduction to Corporate Modeler**
 - a. An introduction to Corporate Modeler
 - b. What Is A Model?
 - c. Complex Things made Simple
 - d. Standard objects types and associations
 - e. A view on standard objects
2. **The modelling environment – Overview of Corporate Modeler**
 - a. Repository Explorer
 - b. Hierarchy Modeler
 - c. Process Modeler
 - d. Matrix Manager
 - e. Generic Modeler

- f. Corporate publisher Output – Html & Word
- g. Automodeler – MS Excel Import and Export
- h. Different roles in modelling

3. Starting Corporate Modeler

- a. The registering of your licence
- b. Starting CM
- c. The CM Start Page
- d. Overview of programs
- e. Navigating in a model
- f. Concepts in Corporate Modeler
- g. Casewise Framework Navigation Page
- h. Navigating in a model – from diagrams
- i. Navigating from the repository explorer

4. Navigation Page

5. Hierarchy Modeler

6. Drill down basics

7. Process Levels

- a. Levels
- b. Process Dynamics Diagram
- c. What is a SDM Diagram?
- d. SDM Template and Example

8. Connector Sets

- a. AND/XOR Connector sets

9. Discussion on complex exercise.

10. FDM diagram.

- a. What is an FDM diagram ?
- b. Example of an FDM diagram

12. Add additional information to objects

- a. Descriptions
- b. Associations
- c. Panes
- d. Spelling and grammar
- e. Navigation object

13. Anchoring diagrams

14. Diagramming environment

- a. Gallery
- b. Issue object and contact person
- c. Grid
- d. Zoom
- e. Print frame

15. Modelling conventions

- a. Modelling conventions
- b. Diagramming convention
- c. Naming Conventions

16. Reporting

17. Matrix Manager

- a. Matrix manager overview
- b. Gap analysis
- c. Create a RACI matrix
- d. Matrix tips

18. Tools and Tips

19. Overview of Corporate Exchange

- a. Why - object ownership?
- b. More than one team working at the same time

- c. Version control & status panes
- d. User groups: Freezing of Objects
- e. Copy a model/diagram/objects

20. Export a model to XML

21. Import a XML file into a new model

22. Update navigation page

23. Overview of Bi-Directional Links

- a. Visio: Bi-Directional Link
- b. Visio Stencils for models

24. Exercise: Convert a Corporate Modeler Diagram to MS Visio

25. Overview of customising objects

- a. Creating a user defined object
- b. Creating a user defined pane
- c. Create user defined associations
- d. Create a new template

26. Create a new diagram using the custom template

- a. Capture additional information
- b. Report on the new object types

27. Create your own business model

- a. Hierarchy diagram
- b. Process Modeler

28. Discussion on model extensions

29. Overview of the Automodeler – A brief introduction to Automodeler

- a. Unload objects from a model
- b. Manipulate export data
- c. Load Objects into a model
- d. Create PowerPoint slideshow
- e. Create an Object Visualization diagram

30. Overview of Corporate Publisher – A brief introduction to Corporate Publisher

- a. Publication set
- b. Publication set panes
- c. Create/Edit publication sets
- d. Corporate publisher help and resources
- e. Publish a Word document
- f. Publish a HTML Document
- g. Publish your own model

31. Introduction to Simulation

- a. Simulation
 - 1. Validation of a Process Simulation
 - 2. Report from a Simulation
 - 3. Animation Setting
- b. Attributes of a Simulation
 - 1. Trigger Frequency - Event Object
 - 2. Delays – Connector Object
 - 3. Throughput – Process Object
 - 4. Resources – Organization Object

32. Run a simple simulation

3. Advanced Training

Advanced training is typically a 2 day course and is appropriate for those modeller's that are getting to that level of confidence where they want to start using the advanced features of Corporate Modeler. This normally becomes apparent after a couple of weeks after attending the Foundation Course.

Advanced training is not recommended if the Foundation Training has not been completed.

Advanced training deals with the following functionality of Corporate Modeler;

3.1. Automodeler

- Working with Data Exporting of Data
- Importing of Date
- Dealing with Data in Spreadsheets
- Data manipulation prior to importing
- Creating a MS PowerPoint Slideshow of Corporate Modeler Diagrams
- Generating Diagrams from a Spreadsheet
- Creating Object Visualisation Diagrams

3.2. HTML and MS Word Publication

- Understanding the dynamics of Publication sets and adjustable variables
- Setting up of Publications sets
- HTML Layout / Stylesheet design
- Word Layout / Template Design (*.dot)
- Changing parameters
- HTML Help and search facilities

3.3. Meta Model Extensions

- User Defined Objects
- User Defined Associations
- User Defined Attributes
- Diagram Template Design
- Tool Folder Design
- Icon / Style Properties Design

3.4. Simulation

- Basic Simulation principles;
- Throughput, Arrivals, Frequency, etc, principles
- Calendars, Shifts, etc
- Boolean Logic – XOR, OR, AND
- Animation of a Simulation
- Interpreting reports
- Optimising a Process using simulation

4. Foundation Training - Certificate



*Delegate
Name*

has attended the
**Casewise Foundation
Course**

and is certified as a proficient user of



Presented by;

Johan Beukes

Date: 9 May 2010

C.F. Van Zyl _____

