ARIS 7.1

ARIS Business Architect
Quick Start Guide

May 2008

Contents

1   Notes on using the Quick Start Guide

This Quick Start Guide introduces you to the basic functions of ARIS Business Architect.

The individual work processes can be divided into the following four phases:

Preparation, modeling, evaluation and management with ARIS Business Architect.
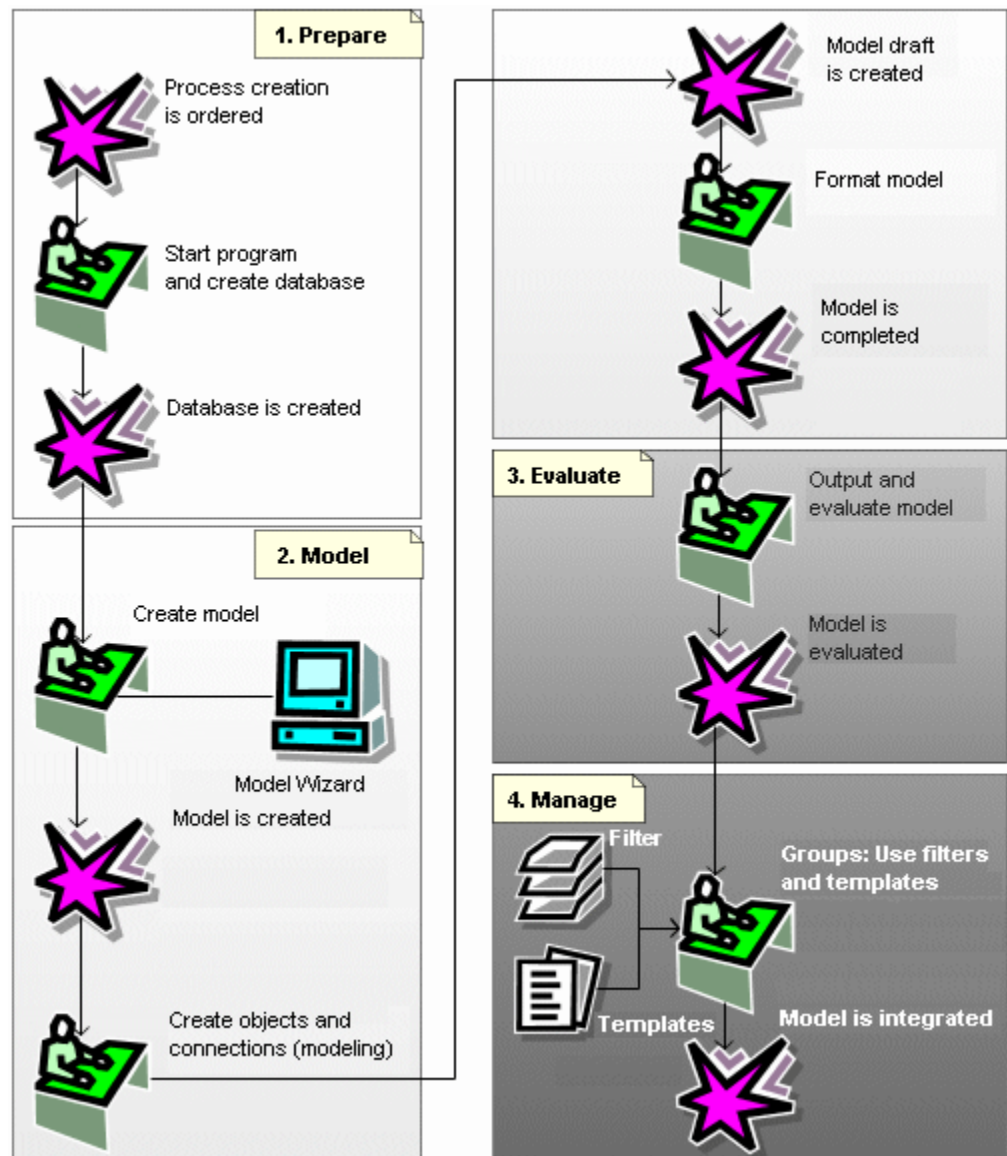
In a simple example, you will create a model of the **Office process** type and use a report to evaluate the content of the model. Next, you will create a model of the **EPC** (event-driven process chain) type from the

office process. Finally, you will customize the appearance of your model using a template.

The Quick Start Guide leads you through the individual ARIS Business Architect functions step by step. Please adhere to the sequence of the chapters.

1.1 Required knowledge

ARIS Business Architect uses a large number of Microsoft Windows properties and standards. To understand the program, the manuals and the online help, a basic knowledge of Windows is required.

1.2 Screen graphics

The screen graphics in this manual can differ from those of your program interface because the functions provided depend on the products that are enabled.
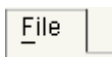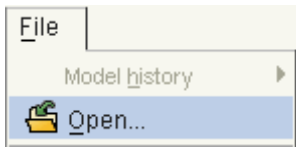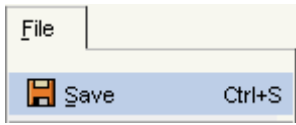
1.3 Writing conventions and formatting features

In the Quick Start Guide, menu items, file names, etc. are indicated by the following writing conventions and formatting features:

Writing conventions/Formatting features	Example
Menu items, shortcut keys, dialog boxes, file names, keyboard entries, etc. are written in **bold**.	Enter **system** as the user name and **manager** as the password. Click on **Help** to open the menu items for the help files as well as the menu items for further information areas.
Sequences of menus and menu items are listed in order, separated by slashes.	Click on **View/Options**.
User-defined entries are highlighted in **bold** and enclosed in angle brackets.	Enter the path **<Directory>\ARIS Platform**.

1.4	Select menus and buttons

In addition to using the mouse, you can select menu items in ARIS Business Architect as follows:

Menu item	Description
File	To open a menu using the keyboard, hold down the **Alt key** and press the letter underlined in the menu. In this example, you press **Alt** + **F**.
File Model history ▸ Open...	To execute a menu item using the keyboard, press the letter underlined in the menu item. In this example, you press the **O** key.
File Save Ctrl+S	You can also run many commands in ARIS Business Architect using shortcut keys. The menu must not be open while doing so. The shortcut keys available are displayed to the right of the menu item. If available, the icon that represents a menu item in a toolbar is shown left of the menu item.
(Save icon)	The buttons on the various toolbars enable quick access to frequently used menu items. The example shows the **Save** button, which corresponds to the **Save** menu item in the **File** menu.

1.5	Using the online help

For questions about working with ARIS Business Architect, refer to the online help.

To open the help, click on **Help/Help topics**. You can access individual help topics via the Contents, Index and Find tabs.

If you need help on one of the dialog boxes or windows that are currently open, click on the **Help** button in the dialog box. All setting options are explained within the dialog box.

2   Preparation

This chapter provides information about how to **launch** ARIS Business Architect and the **preparations** you need to make before you can begin to create models.

2.1   Launching ARIS Business Architect

It is assumed that you have installed ARIS Business Architect in the directory and program group suggested by the installation program. You must also have installed the standard local database system so that you can access the **LOCAL** server. If the **LOCAL** server is not installed, use the relevant server whenever LOCAL is referred to here.
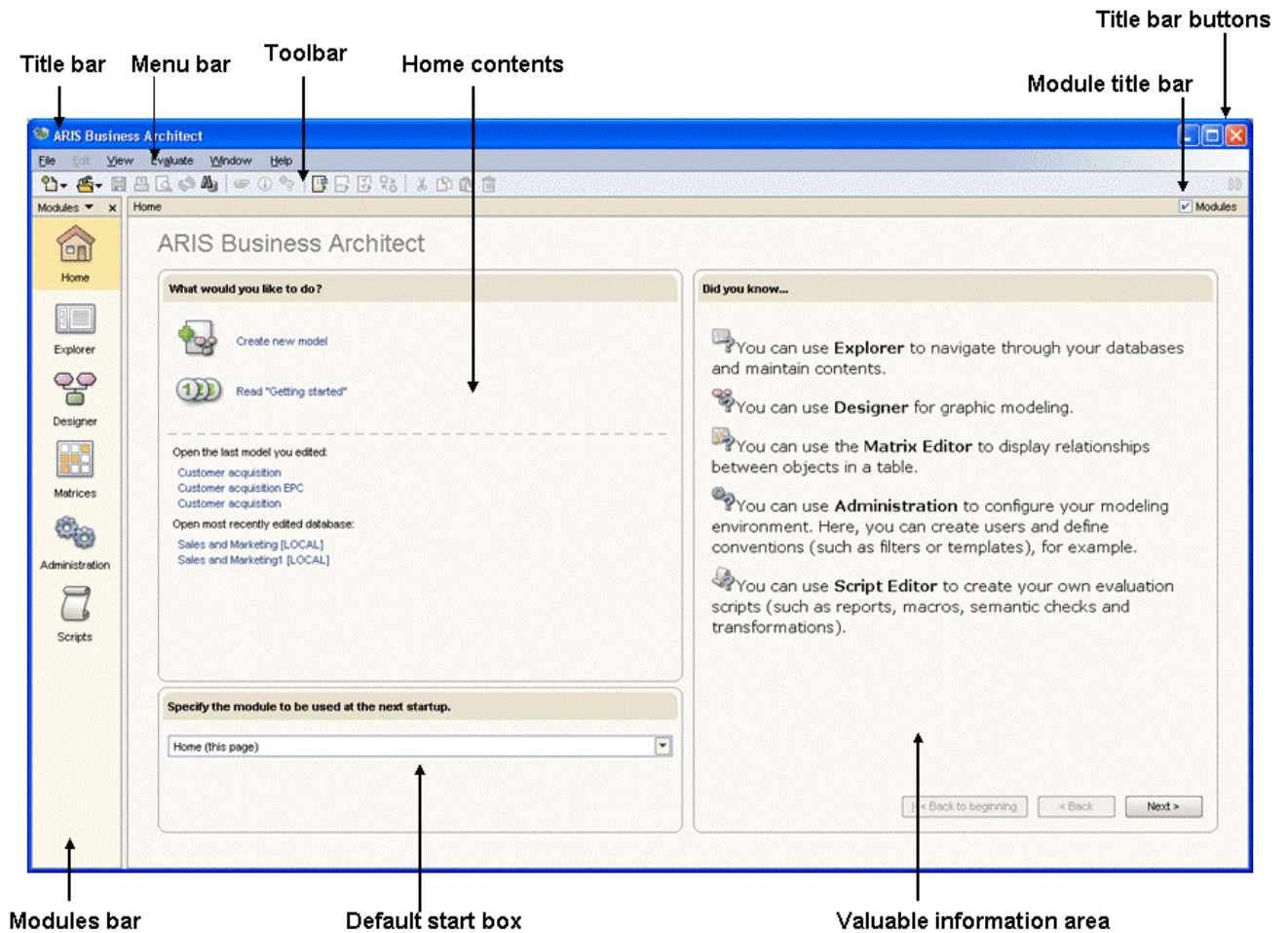
Settings

Configure ARIS Business Architect as specified in the Basic settings (Page 51) chapter (see Appendix).

Procedure

1. Click on **Start/Programs/ARIS Business Performance Edition/ARIS Design Platform/ARIS Business Architect 7.1**. When you start ARIS Business Architect, the start page is displayed automatically.

You can now use ARIS Business Architect:

Title bar

Shows the name of the program.

Menu bar

Contains the available menus.

Toolbar

Contains buttons providing quick access to frequently used functions.

"Home" content

Provides quick access to information about the program, default start box and the databases and models you have already used.

Module title bar

Shows the name of the open module and allows you to show or hide window panes.

Title bar button

Provides buttons for minimizing, maximizing and closing the program.

Module bar

Contains buttons for switching between modules. Modules contain all of the functions required for specific processes. For example, you will find all of the functions required for modeling in the **Designer** module.

Default start box

Allows you to define which module of ARIS Business Architect is to open automatically when you start the program.

Valuable information area

Provides information about the functions in ARIS Business Architect and how to use them. You can use the buttons provided to scroll through the information.

2. In the **Specify the module to be used at the next startup** box, select **Designer**.

2.2   Setting a default filter

Working through the Quick Start Guide is optimized if you change the preset method filter as follows:

Procedure

1. Click on **View/Options**. The **Options** dialog box opens.

2. Click on **Log in** on the **Selection** tab.

3. Click on the Browse button (⬚) next to the **Filter** box. The **Select filter** dialog box opens.

4. Click on the **Server** box and select the **LOCAL** server as the storage location for your database. The method filters available on the server are listed.

5. Select **Easy Filter**.
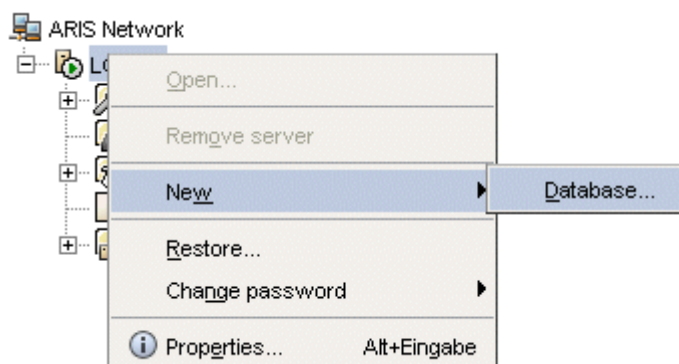
6. Click on **OK** to exit the dialog box.

Your setting is now accepted as the default setting. If you enable (Page 51) the **Use defaults** check box and double-click later on the name of a database, the database is opened directly based on your selected method filter.

2.3   Creating a database

In the following, you will create a database to save the data that you will generate while working through the Quick Start Guide.

Procedure

1. In the **Modules** bar, click on **Administration**.

2. In the tree view, click on the plus sign in front of the **LOCAL** server to connect to the server and display the hierarchical structure of the ARIS Network.

3. Right-click on **LOCAL** and select **New/Database**.

4. The **Create database** dialog box opens. Enter **Sales and Marketing** as the database name.
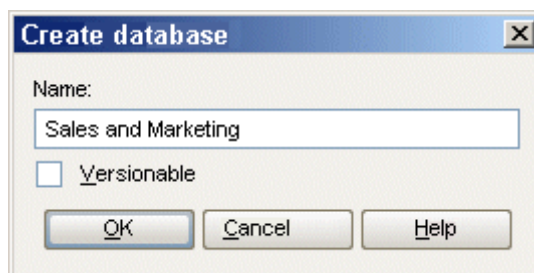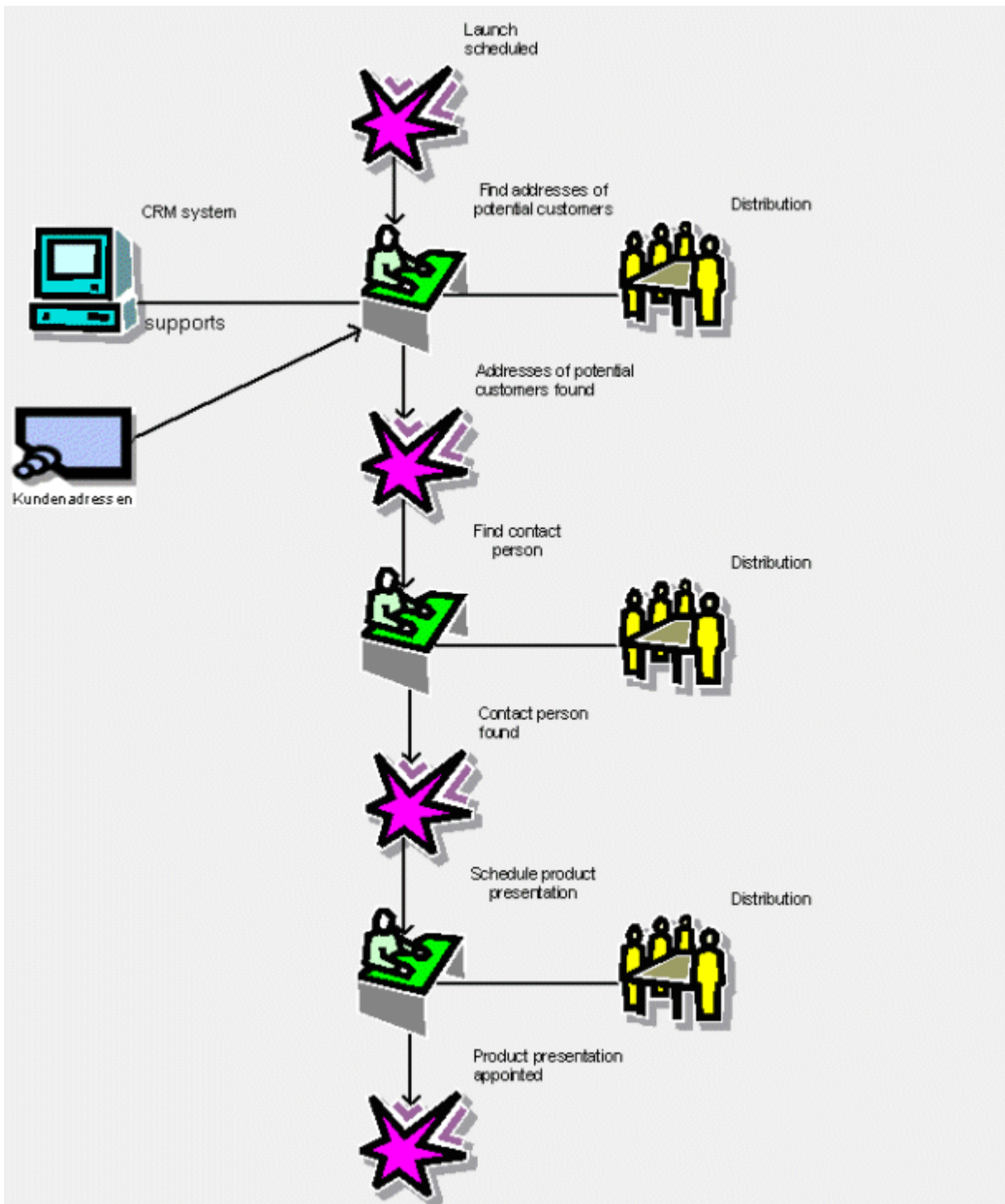

5. Click on **OK**. The **Sales and Marketing** database is now available on the server and is visible in the tree view.

3   Modeling with ARIS Business Architect

The following pages explain how you can easily display content using a model of the **Office process** type.

Your **Customer acquisition** office process will appear as follows when finished:
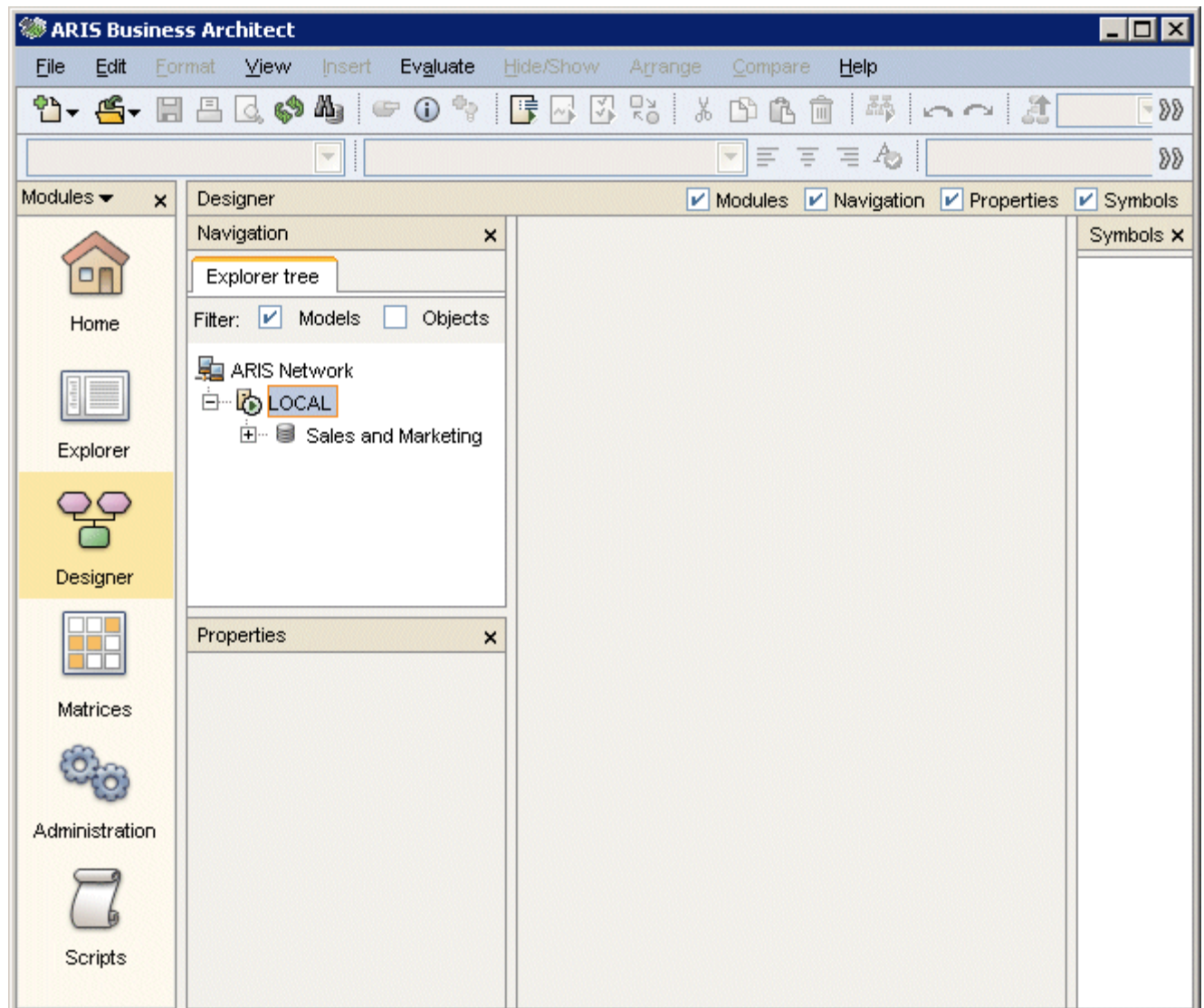
4   Creating a model

To create the **Customer acquisition** office process, proceed as follows.
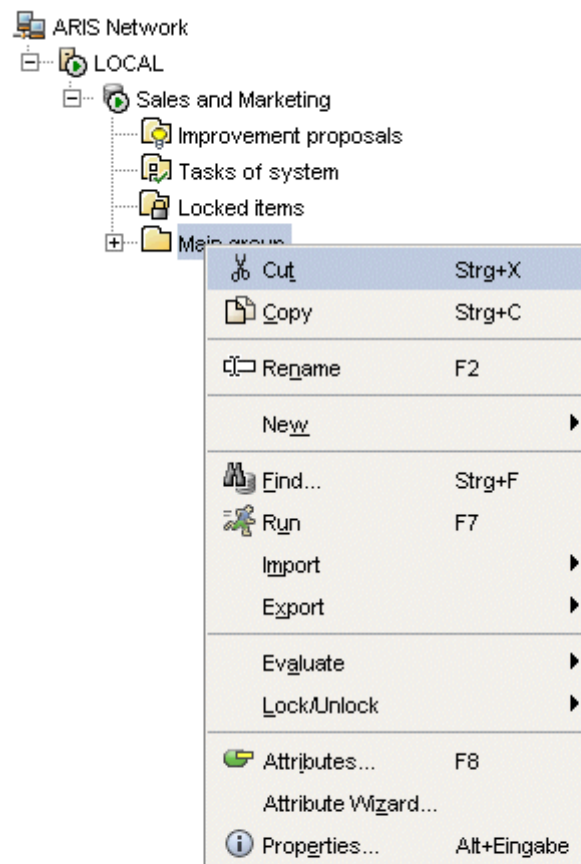
Procedure

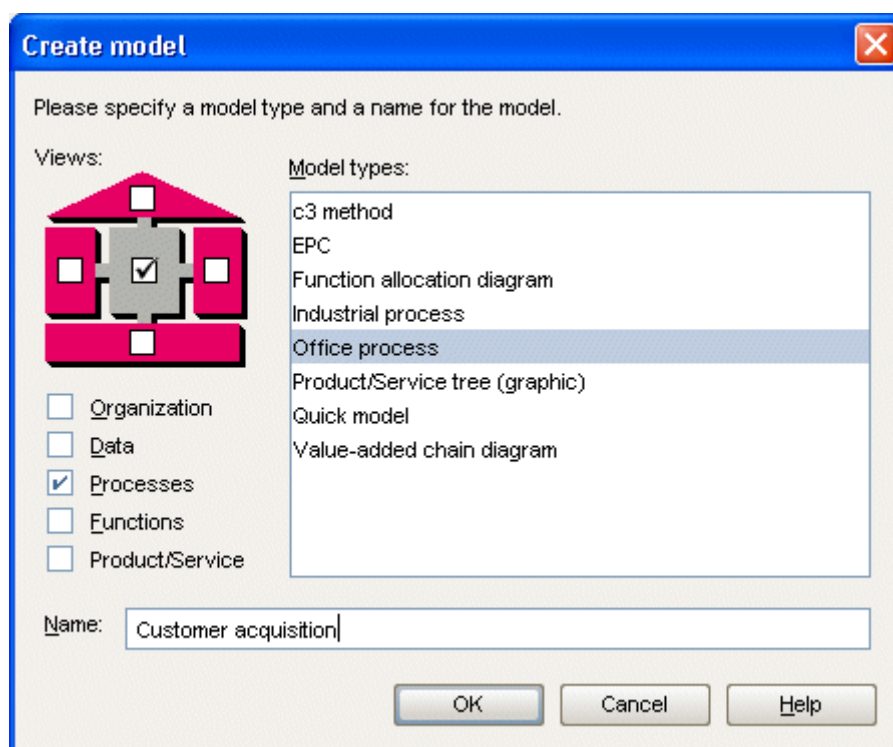1. Click on **Designer** in the **Modules** bar. You can now use the **Designer** module:

2. Click on the plus sign in front of the **Sales and Marketing** database. In the list, you will find the **Main group** folder, where you can store the new model.

3. Right-click on the main group and select **New/Model**.

The Model Wizard opens. The **Processes** view of the ARIS House is selected by default.

The models are assigned to different sections of the ARIS House. The views correspond to the descriptive views **Organization**, **Data**, **Processes**, **Functions** and **Products/Services**. If you click on a section in the ARIS House, the check box for this view is enabled. The list then shows all model types that are assigned to the selected descriptive views and are allowed by the selected method filter (Page 6). To disable a descriptive view, click on the section again.

Please refer to the **ARIS Method** manual for a detailed description of the ARIS architecture and an explanation of the descriptive views and levels.

4. Click on **Office process** in the **Model types** box.

5. Enter the name **Customer acquisition** in the **Name** box.

6. Click on **OK**. The **Customer acquisition** model is generated and automatically opens in the **Designer** module.

7. Before you continue, please configure the **Designer** module for this quick start exercise: Hide all panes except Modules and Symbols by disabling the irrelevant check boxes in the module title bar.

You can show the panes again at any time for navigation or for editing object properties.

The model window, various toolbars and various buttons are now available for creating your model.
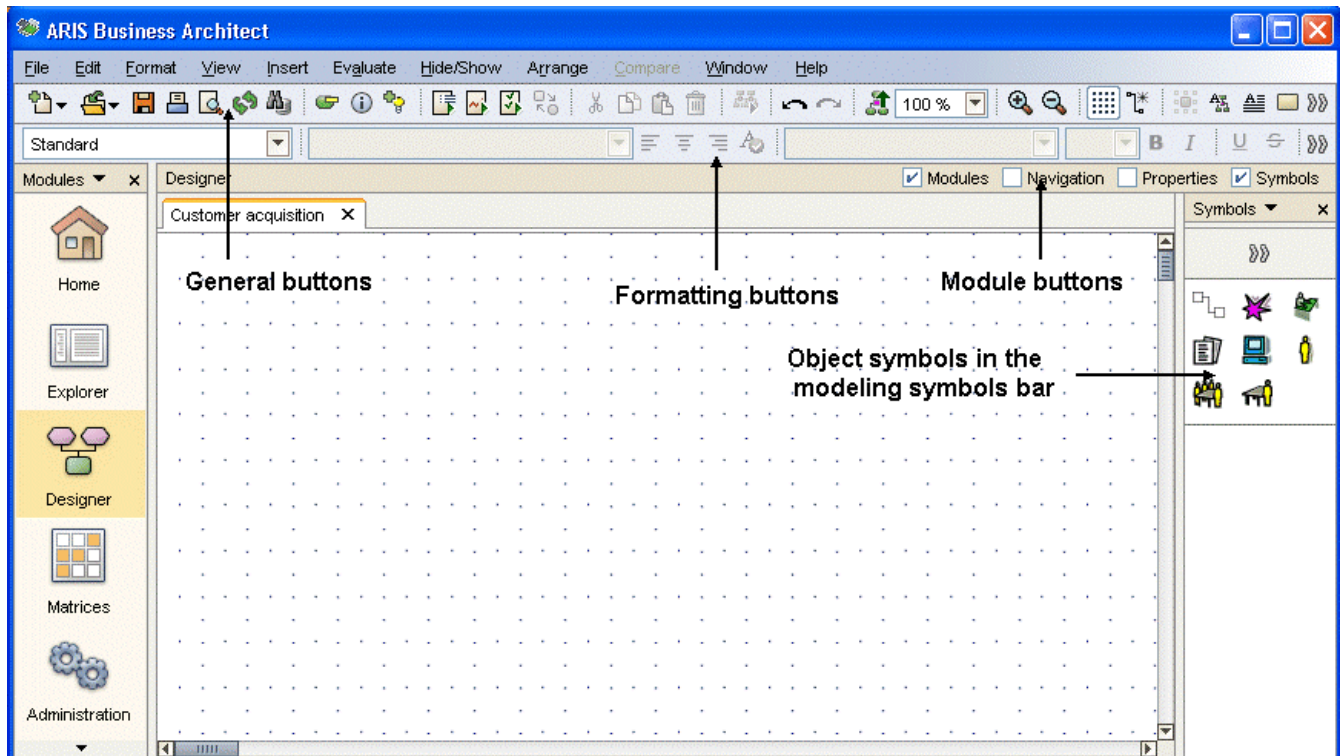
Tip

If you place the mouse pointer over a toolbar button and leave it there for a moment, information on this button is displayed below the pointer.
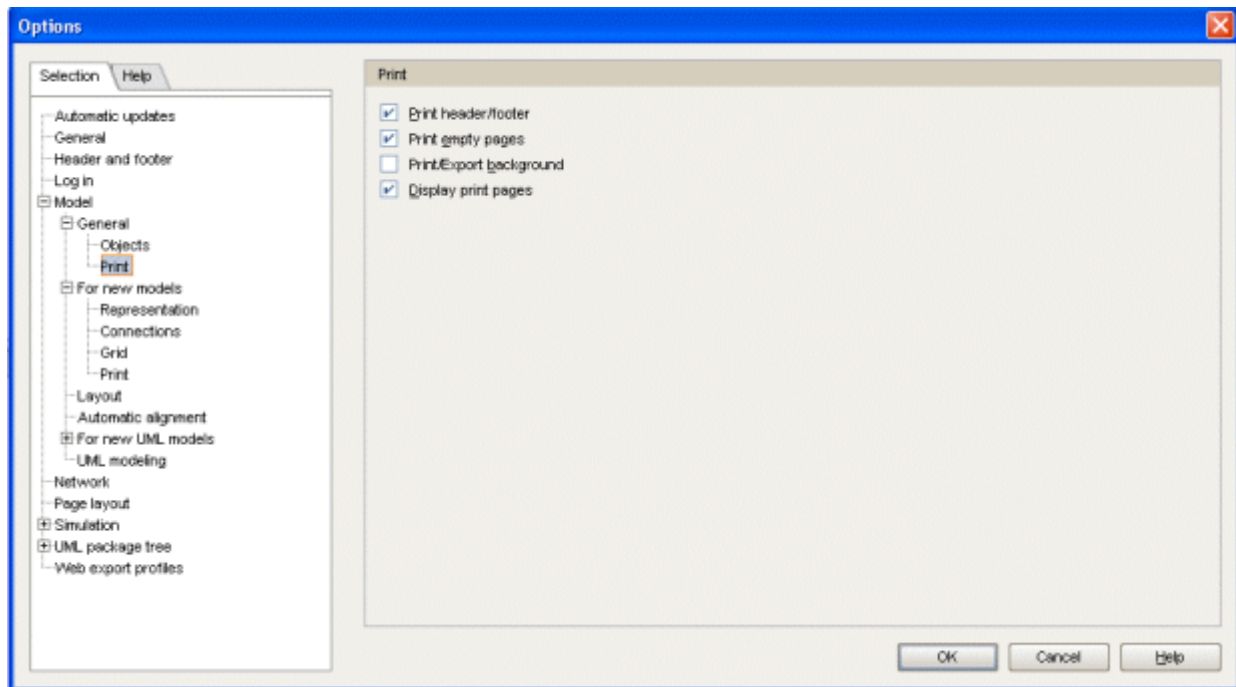
4.1   Displaying print pages in the model window

To predefine which parts of your model are to be placed on which print page, you can delimit the print pages displayed in the model window using red dashed lines.

Procedure

1. Click on **View/Options**.

2. On the **Selection** tab, click on **Model/General/Print**.

3. Enable the **Display print pages** check box.

4. Click on **OK**.

The individual print pages are now indicated by red dashed lines in the model window. Thus, you can ensure optimal object placement for the printout while modeling.

Note

The settings specified in the **Model/General** dialog boxes, which you access using the **View/Options** menu item, apply to all models. Settings specified in the **Model/For new models** dialog boxes apply to new models only.

4.2   Creating objects and object attributes

In this section, you will place objects in your model and edit object attributes. If you place the mouse pointer over a symbol in the **Symbols** bar and leave it there for a moment, help text is displayed below the pointer.

Procedure

1. Activate connection mode in the toolbar ( ).

2. Click on the **Event** symbol in the modeling toolbar:

3. Move the mouse pointer to the modeling area and click again. The event is created and a text box opens automatically.

4. Enter a name for the event by overtyping the selection with **Launch scheduled**. To insert a line break between **Launch** and **scheduled**, press **Enter**.

   The following dialog box opens the first time you insert a line break:
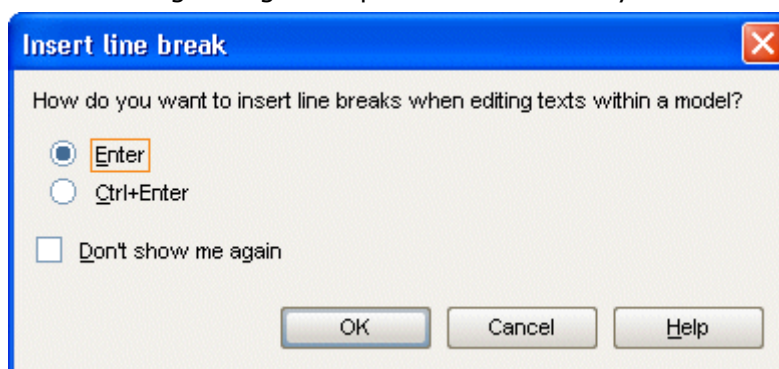
   Here you can specify that a line break is to be inserted when you press **Enter** or when you press **Ctrl + Enter**.
   Enable the **Don't show me again** check box so that this dialog box will not be displayed again and click on **OK**.

5. Depending on which of these options you have selected, press **Enter** or press **Ctrl+Enter** to confirm.
   The object remains selected and the modelling toolbar only shows the symbols that can have a connection to the event based on the method defaults.

6. Click on the **Function** symbol in the modeling toolbar:

   The connections allowed by the method are displayed. Keep the **Launch scheduled activates Function (Office)** connection activated and click below the **Launch scheduled** event in the model window. Overtype **Function (Office)** with **Find addresses of potential customers**.

7. Create the following objects while retaining the connection default:

   a. Event: Addresses of potential customers found

   b. Function: Find contact person

   c. Event: Contact person found

   d. Function: Schedule product presentation

   e. Event: Product presentation scheduled

8. Reduce the size of the model displayed in the model window. To do this, select 100% in the **Size of appearance** box of the toolbar, overtype it with 85, and press Enter.

   Alternatively, you can reduce or increase the size of appearance by pressing the **plus or minus key**. The scale is either reduced or increased by 10%.

9. Click on the **Find addresses of potential customers** function and create a **Computer** object to the left of the function:

   Name it **CRM system**. The **Computer** object represents objects of the **Application system type** type, i.e. it stands for technical systems that support the execution of business processes.

   If there is no enough space:

   a. right-click in the model background and

   b. select **Insert and remove space/Vertically**.

   c. Move the line to a position to the right of which you want to insert space.

   d. Press and hold down the mouse button.

   e. Move the mouse pointer to the right.

   f. Release the mouse button at the desired position.

The space is inserted between the two objects.

10. Create an organizational unit to the right of the **Find addresses of potential customers** function:

Name it **Sales**.

11. Right-click on the **Sales** object and select **Attributes**. Attribute Editing opens.

12. In the tree view, click on Simulation, click on the input box for the **Number of employees** input box and enter **12**.
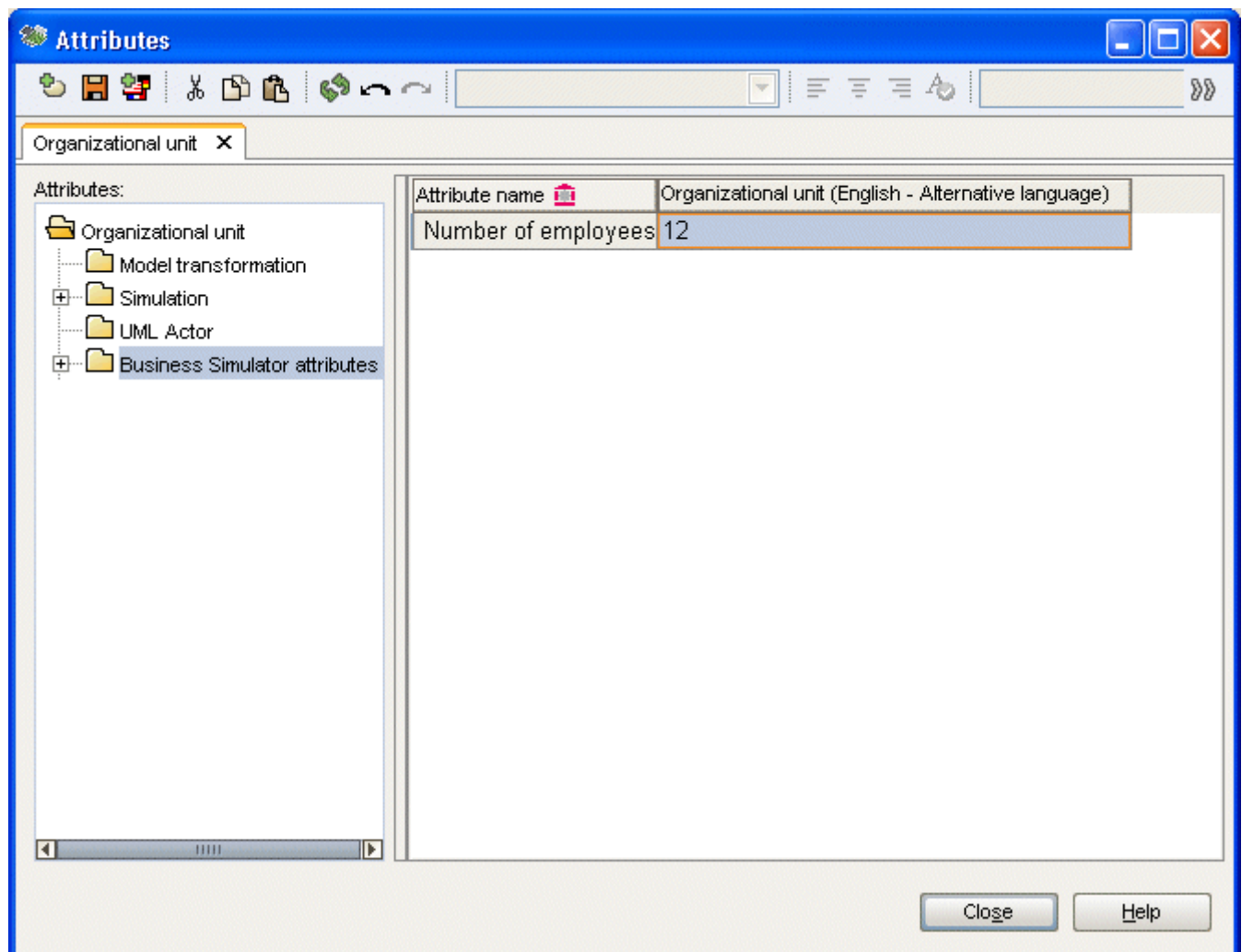
13. Click on **Save**().

14. Click on **Close**.

Tips

- To change attributes for multiple objects, select the objects, right-click in the selection and select **Attributes**. The selected objects of each object type are summarized on individual tabs.

- In order to create multiple symbols of the same object type in the model, click on a symbol in the modeling toolbar, press and hold the **Ctrl key**, and successively click on the positions where you want to place the objects. In this case, the objects are given the name of the object type. To change the name, select the required object and press the **F2** key. The name of the object is selected and you can overwrite it.

4.3   Creating object occurrences

The **Sales** organizational unit is also responsible for the **Find contact person** and **Schedule product presentation** functions. To structure your model clearly, you can create an occurrence of the **Sales** object beside each of these functions. Object occurrences are copies of object symbols that represent the same object in one or more models. Any occurrence of the **Sales** object that you create will represent the object you have already created in your model. If you change an occurrence, the changes will apply to all occurrences. This becomes apparent if you change the name of the object.

Procedure

1. Right-click on **Sales**, hold down the mouse button and move the pointer to the right of the **Find contact person** function. Release the mouse button and click on **Create occurrence copy here**. Another symbol is created in the model for the **Sales** object.

2. Create another occurrence to the right of the **Schedule product presentation** function.

The two new occurrences should then be arranged more or less as shown in the graphic.
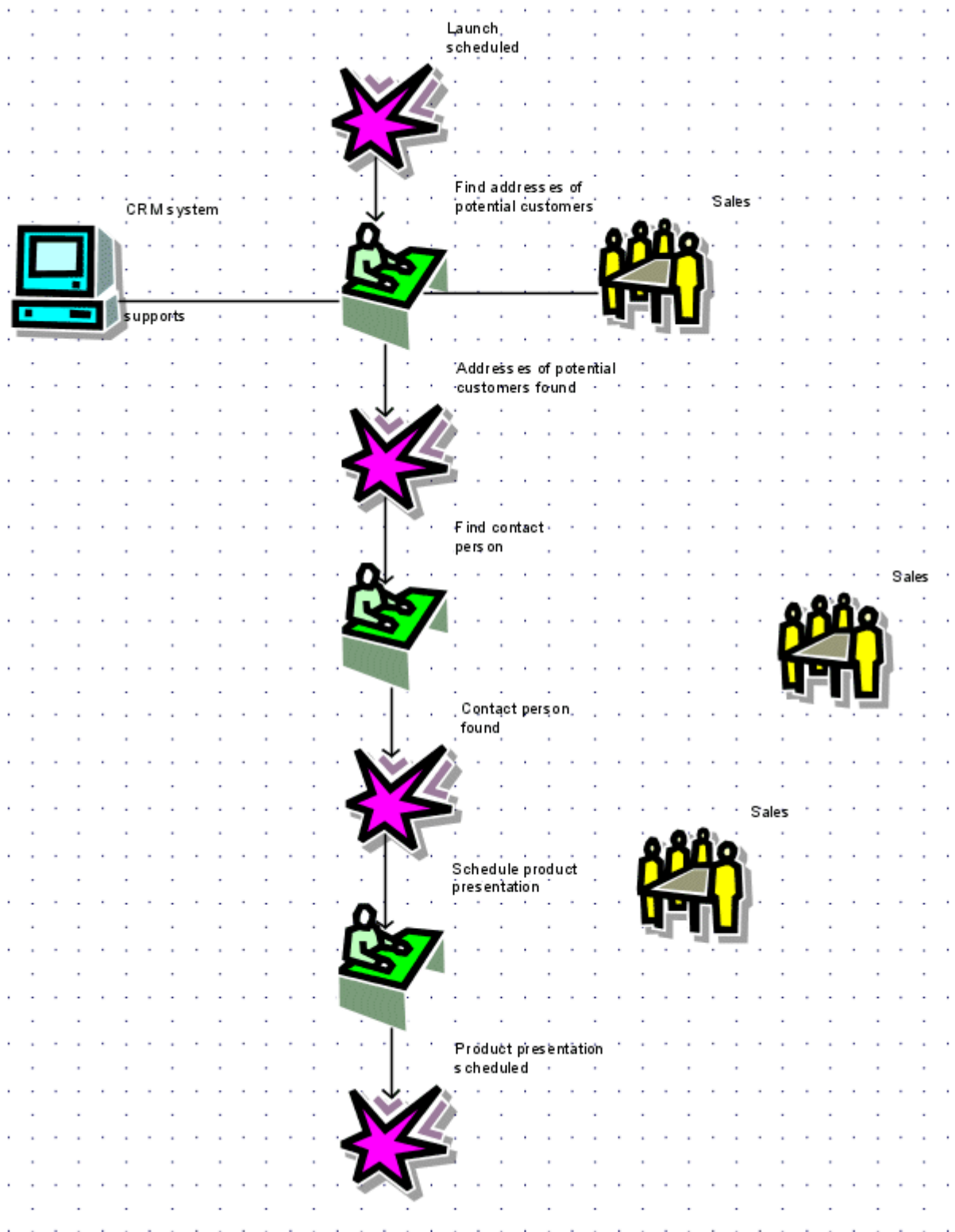
To move a symbol, click on the symbol, hold down the mouse button, drag the symbol to the preferred position, and release the mouse button.

4.4 Renaming objects

You can change object names directly in the model. If you change the name of an object, all occurrences of the object in the database are renamed accordingly.

In the following, you will change the name of the **Sales** organizational unit.

Procedure

1. Right-click on one of the three **Sales** symbols and select **Rename**.

2. Enter the name **Distribution** and press either **Ctrl + Enter** or just **Enter** to confirm, depending on which keyboard shortcut you have selected for line breaks.

The name of the organizational unit is now **Distribution** and all occurrences of the object are displayed with the new name.

4.5 Arranging and grouping objects

Now, you will arrange the symbols in the model.

Procedure

1. Position the mouse pointer to the left of/above the **CRM system** object, press and hold the left mouse button, and drag the mouse pointer to the right of/below the **Distribution** object. This completely encloses the adjacent objects **CRM system**, **Find addresses of potential customers** and **Distribution** within the displayed frame. Now release the mouse button. The objects are selected.

2. Click on **Arrange/Align/Center vertically** (⬛).

3. Click on **Arrange/Align/Center horizontally** (⬛).

4. Right-click on the selected objects and select **Group**. You can now move or edit the three grouped objects together only.

5. Right-click in the model background and select **Select/Select all**.

6. Hold down the **Ctrl** key and successively click on the two new occurrences of the **Distribution** organizational unit. The symbols are now removed from the selection.

7. Release the **Ctrl key** and click on **Arrange/Align/Center horizontally** (⬛).

8. Click on **Arrange/Align/Distribute vertically** (⬍).

9. Click in the model background to deselect all symbols.

10. Increase the distance between the **CRM system** Application system type and the **Find addresses of potential customers** function by clicking on **CRM system**. All three objects in the group are selected automatically. To move the grouped objects separately, you must first ungroup them.

11. Click on **Ungroup**.

12. Right-click in the model background and select **Select/Select all**.

13. Hold down the **Ctrl** key and click on **CRM system**. The object is removed from the selection.

14. Now you can move the selected objects to the right by increments of two gridlines. To do this, hold down the **Shift key** and press the **right arrow key** twice. The selected objects are moved in line with the grid steps.

15. Click in the model background to deselect all symbols.

16. Arrange the **Distribution** object occurrences. Right-click on one of the object occurrences and enable **Select/Select all of this type**. The symbols are selected.

17. Click on **Arrange/Align/Align right** ⬚.

18. Click in the model background to deselect all symbols.

19. Hold down the **Ctrl** key and successively click on **Find contact person** and the **Distribution** organizational unit placed to the right. The symbols are selected.

20. Click on **Arrange/Align/Align to bottom** ⬚.

21. Click in the model background to deselect all symbols.

22. Repeat steps 19 to 20 for the **Schedule product presentation** object and the **Distribution** organizational unit object on the right.

The objects of the model are now arranged as follows:
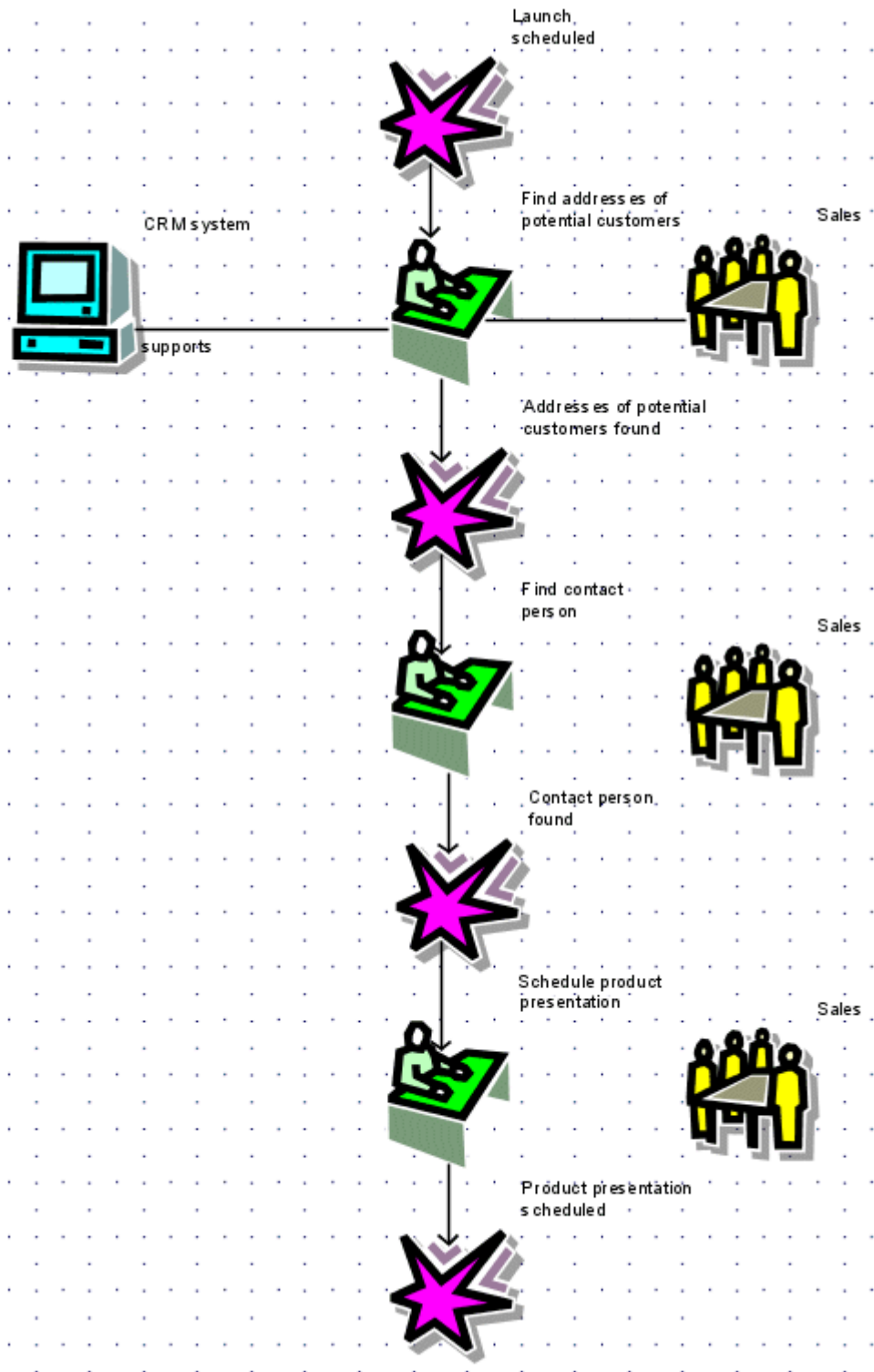
4.6	Creating connections

In the following, you will link the objects in your **Customer acquisition** model via connections.

Procedure

1. Position the mouse pointer over the left border of the center occurrence of the **Distribution** organizational unit. A connection anchor point is displayed. Click on the anchor point, and move the mouse pointer to the right border of the **Find contact partner** function. Clicking on the anchor point that appears at the function will connect the two objects.

   The shape of the mouse pointer indicates the status of the connection drawing operation.

   When you move the mouse pointer over the anchor point of an object that can be linked with a connection, a target square is displayed.

   When you click on an object anchor point and move the mouse pointer to the target object, a cross is displayed.

   This shape indicates that you are moving the mouse pointer over a target object for which the method does not allow connections.

   This may occur if you attempt to draw a connection from the **Launch scheduled** event to the **CRM system** or **Distribution** objects, for example.

2. Draw a connection from the bottom occurrence of the **Distribution** organizational unit to the **Schedule product presentation** function on the left.

4.7 Placing attributes

To ensure that connections do not cross object names, position the object names at the top right of the objects. You can also left-align the names.

Procedure

1. Right-click on an object and click on **Select/Select all of this kind**.

2. Right-click in the selection and select **Format/Edit attribute placements**.
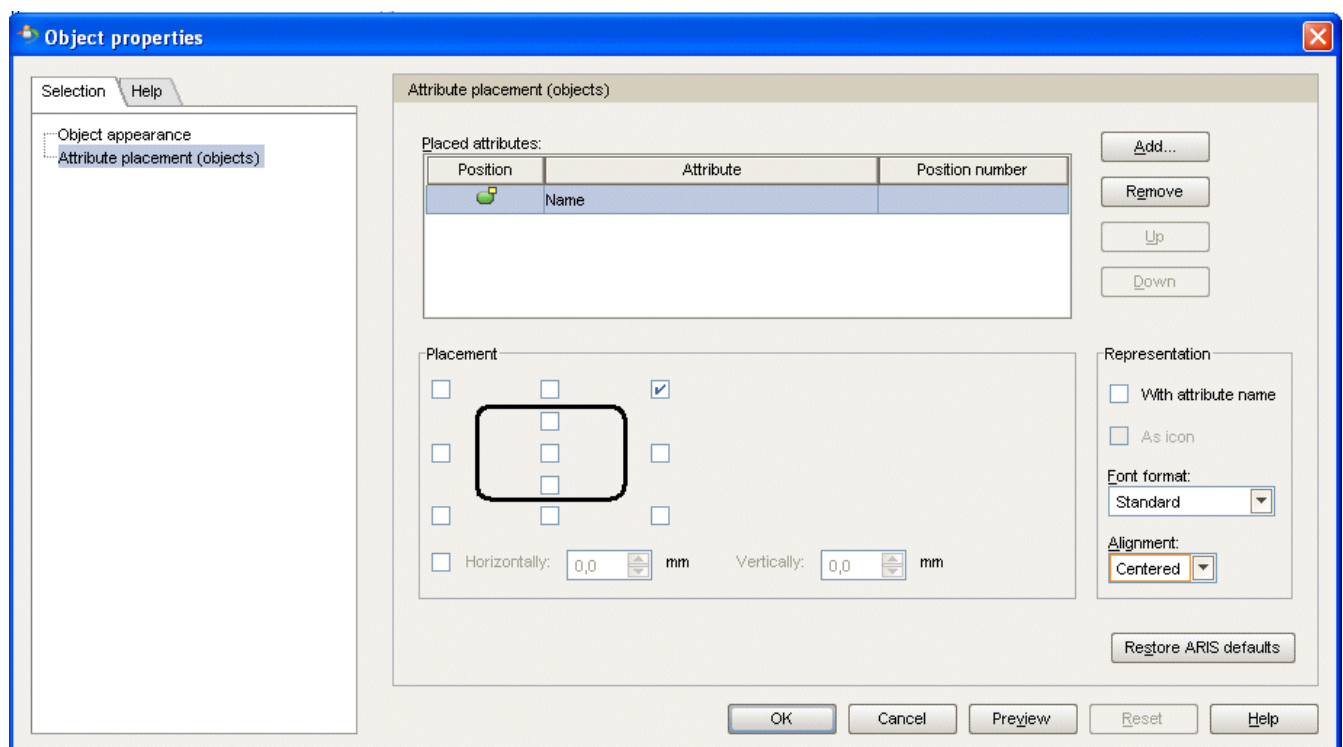
3. Click on the **Name** attribute in the **Placed attributes** box.

4. Click on the upper right check box in the **Placement** preview window.

5. Ensure that **Left** is selected in the **Alignment** box.

6. Click on **OK**.

   The names of the selected objects are now aligned to the left in the selected position.

7. Click in the model background to deselect the model elements.

8. If your model is no longer fully visible in the model window, reduce the size of the model's appearance. To do this, select the current value in the **Size of appearance** box of the toolbar and overwrite it with **80**, for example.Press the **Enter** key.

9. To move the model in the model window, right-click in the model background and select **Select/Select all**. Click anywhere in the selection, hold down the mouse button, and drag the model to the desired position in the model window.

In addition to the name, you can display other attributes of objects or attributes of connections in the model.

Display the type of connection between "CRM system" and "Find addresses of potential customers"

Procedure

1. Right-click on the connection that runs from the **CRM system** Application system type to the **Find addresses of potential customers** function and select **Format/Edit attribute placement**.

   In the preview window, the **CRM system** source object is displayed in the first position because the connection runs from there to the **Find addresses of potential customers** target object.

2. Click on **Add**.

3. Click on **Type** in the **Add attributes** dialog box.

4. Click on **OK**.

5. Since the **Type** attribute is the only placed attribute, it is already selected. Click on the bottom left check box in the **Placement** preview window.
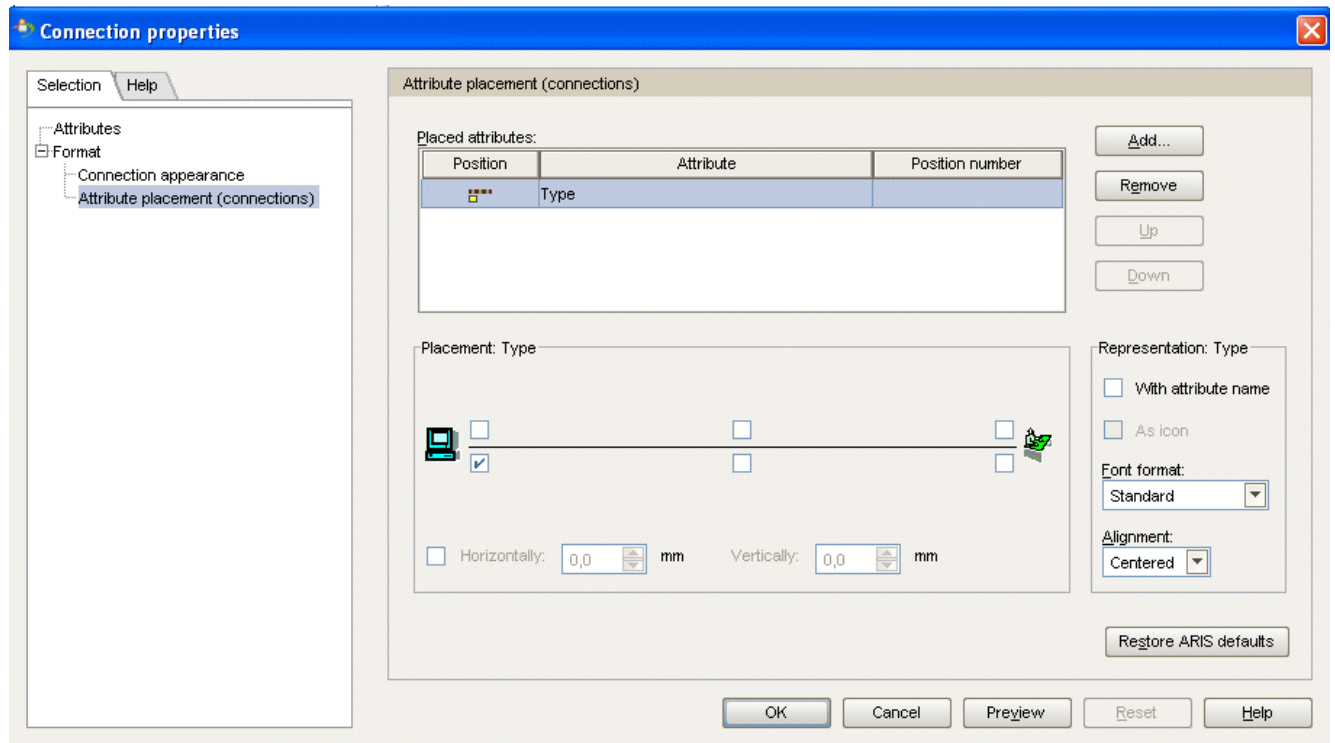
6. Click on **OK**. The dialog box closes.

7. Click in the model background to deselect all symbols.

You can now see directly in the model that the relationship between the **CRM system** Application system type and the **Find addresses of potential customers** function is of the **supports** type.

Your model now looks like this:
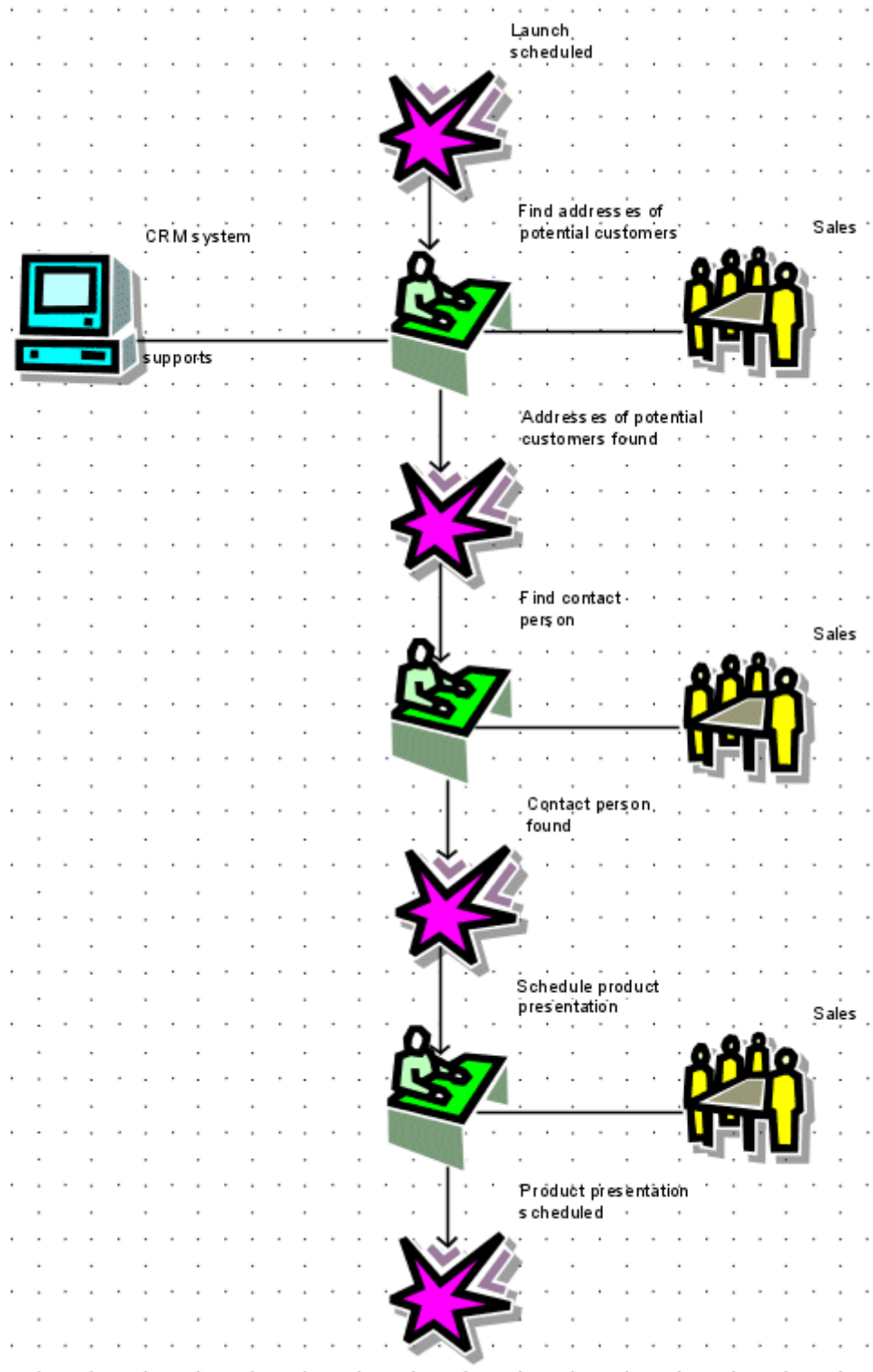
4.8 Creating links

You can link objects in ARIS Business Architect with Web sites or e-mail addresses via hyperlinks. This enables you to access Web sites or send e-mails directly from ARIS Business Architect. You can also link objects with programs like Excel, Word or PowerPoint and run these directly from ARIS Business Architect.

4.8.1 Creating a hyperlink

To link the **Distribution** object with a Web site, proceed as follows:

Procedure

1. Right-click on an occurrence of the **Distribution** organizational unit and click on **Attributes**.

2. Click on **System attributes**. The rows correspond to the attributes. The attribute names are followed by cells in which you can enter the attribute values. The name of the **Distribution (English)** organizational unit indicates the column containing all system attributes of the **Distribution** organizational unit. The name **Distribution** is followed by the language in which the language-dependent attribute values are maintained. You can change the column width by clicking on a dividing line in the column header, holding down the mouse key and moving the line.
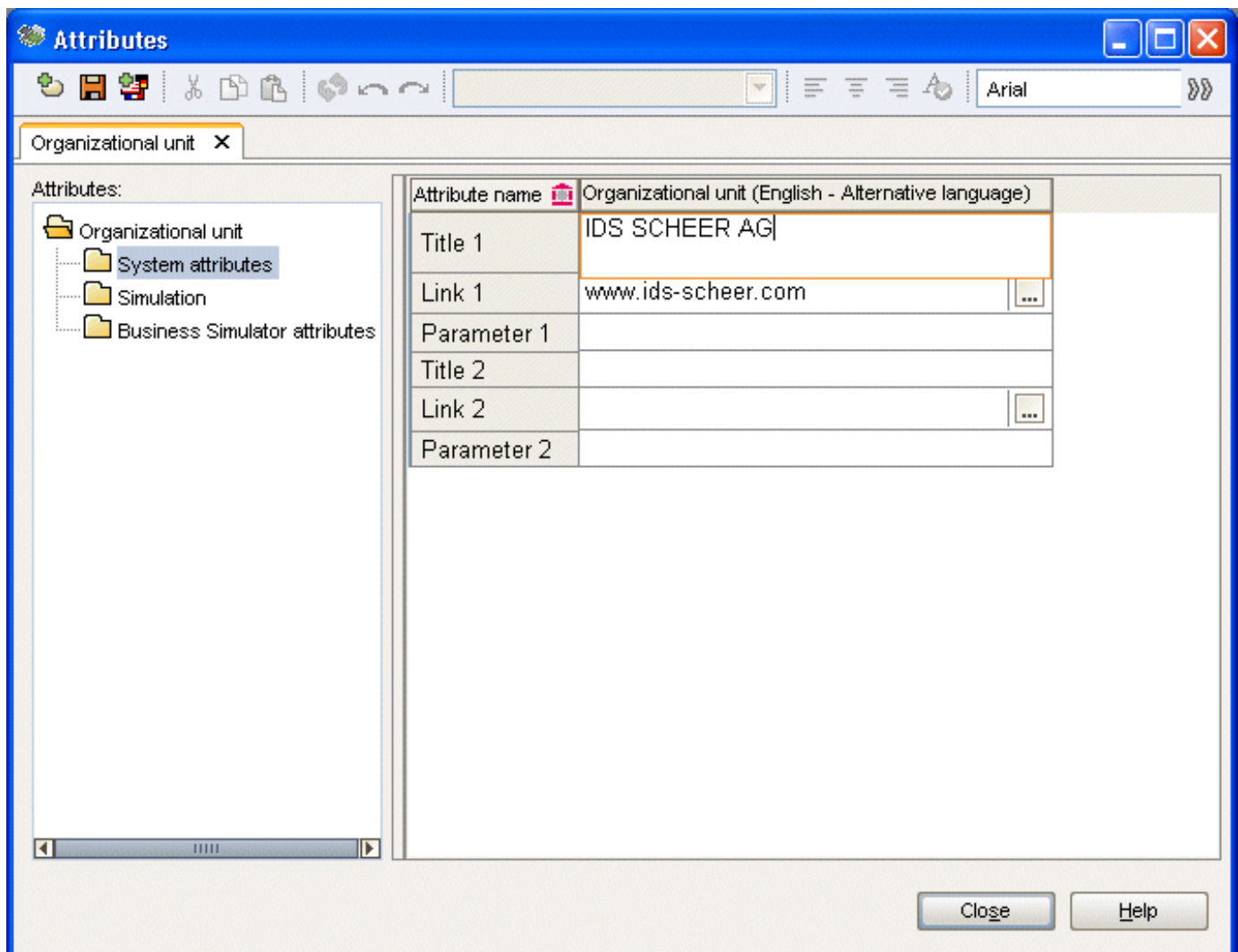
3. Click in the cell of the **Title 1** attribute and enter **IDS Scheer AG** as the name of the hyperlink.

4. Click on the cell of the **Link 1** attribute and enter the address **www.ids-scheer.com**.

5. Click on **Save** (🖫) to save the attribute modifications.

6. Click on **Close**.

7. Right-click on an occurrence of the **Distribution** organizational unit and then click on **Start**. Your Internet browser is launched and the IDS Scheer Web site opens.

8. Close your Internet browser.

Tip

You can also run the hyperlink directly from the **Attributes** window or via the **Attributes** tab under Properties. For example, right-click on the **Distribution (English)** column header in the open **Attributes** window and then click on **Run**.

4.8.2 Creating a link to another program

To link the **CRM system** object with a program (e.g. Excel), proceed as follows:

Procedure

1. Right-click on the **CRM system** object and select **Attributes**. Attribute editing is enabled and the tab for the **Application system type** object type is shown.

2. Click on the **System attributes** attribute type group.
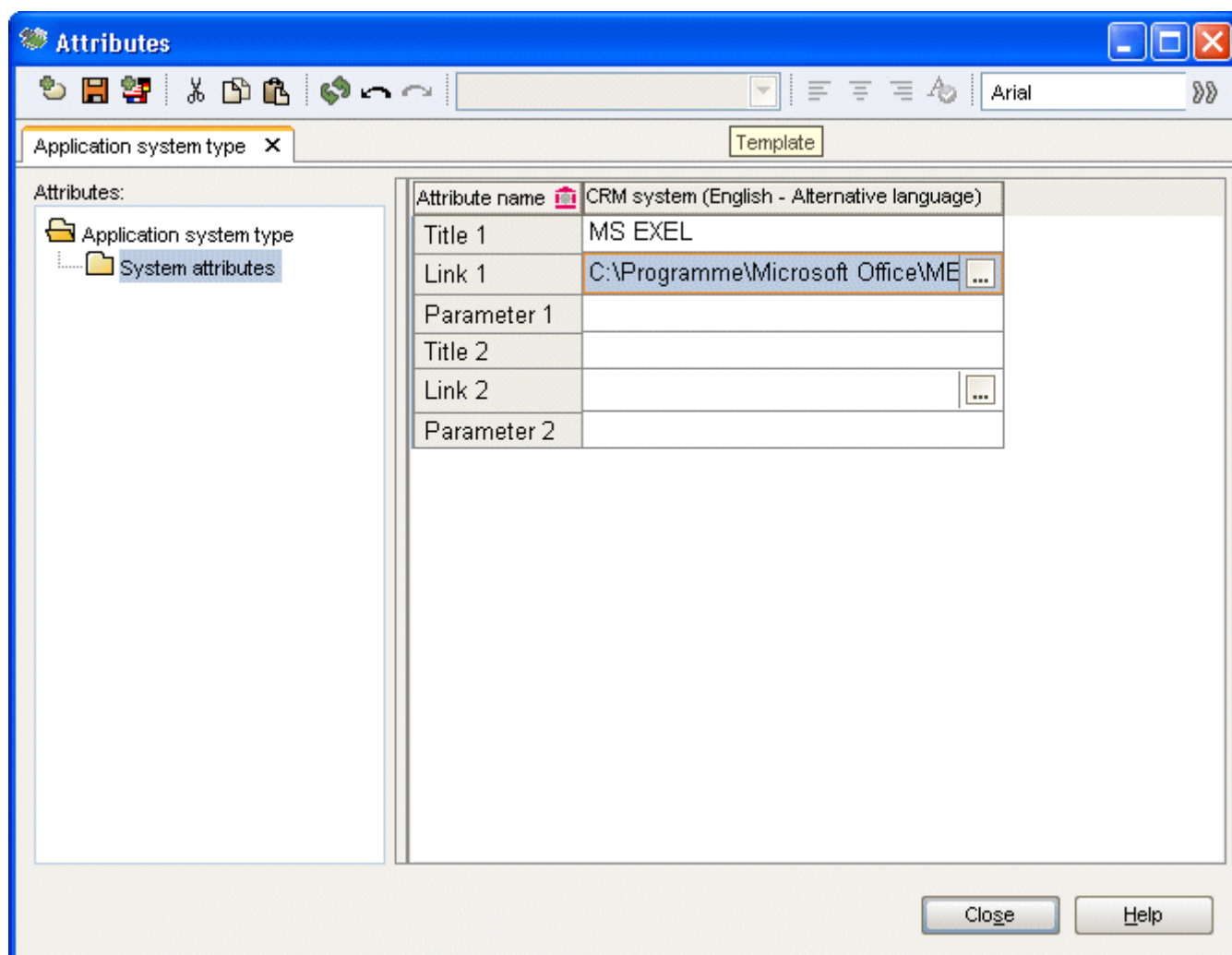
3. Click in the cell of the **Title 1** row and enter the program name (e.g., MS Excel).

4. Click on the **Link 1** cell and enter the path to the executable file of the program in the cell, for example, C:\Programme\Microsoft Office\OFFICE11\EXCEL.EXE. You can also click on the **Browse** button (⬚) and navigate to the relevant directory.

5. Click on the Save button (💾) to save the attribute changes.

6. Click on **Close**.

7. Move the mouse pointer over the **CRM system** object, right-click and select **Run**. The linked program is launched.

8. Close the program.

5   Saving a model

To save your work, click on **File/Save** (). The model is saved in the main group of the **Sales and Marketing** database.
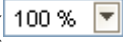
6   Printing a model

You can configure the print output of the model using the following settings.

6.1   Specifying print scale and color

You can specify the size of the model and choose whether it is to be printed in color or black and white.

Procedure

1. Click on **File/Print preview** ( ). The print preview for the model opens. Set the print scale and specify whether the model should be printed in black and white or in color.

2. To reduce the print scale, click on the **Print scale** box (100 % ▾), overwrite the selection with 80, for example, and press **Enter**. The model size is immediately reduced to 80 % of its original size. This action also changes the print page display in the model window.

3. If the model is printed with a black-and-white printer, the colors are converted to shades of gray. Click on the **Black and white** button ( ). The print preview and the print output both show the model in black and white.

   You can align the model on a print page by moving it. To do this, exit print preview by clicking on **Close**. Right-click in the model background and select **Select/Select all**. Click in the selection, hold down the mouse button, and drag the model to the desired position. Use the print page minor tick marks to monitor the position of the model.
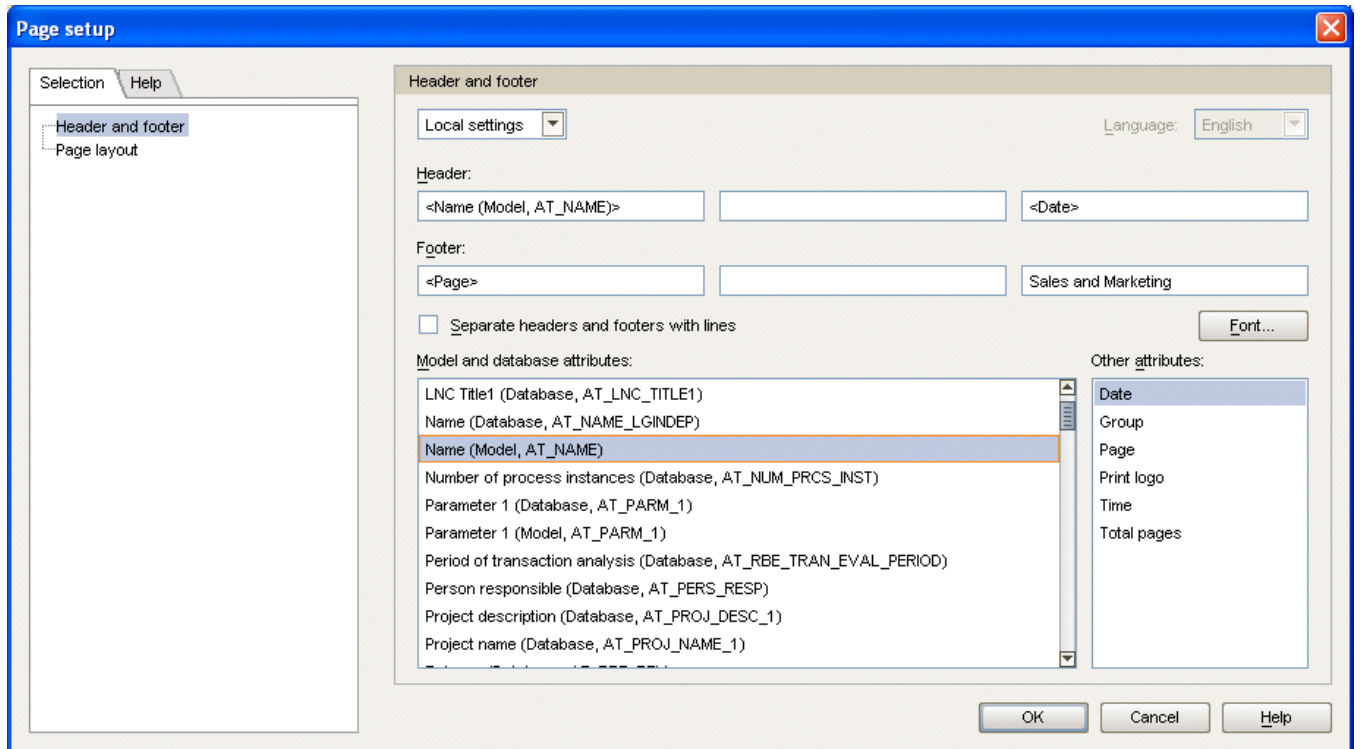
4. Click in the model background to deselect all symbols.

6.2   Configuring the header and footer

To add more information to the print output than is contained in the model, you can place data in the header and footer.

Procedure

1. Click on **File/Page setup** (⊞).

2. Ensure that the **Header and footer** entry is selected on the **Selection** tab.

3. Change **Global settings** to **Local settings**, if necessary. To do this, click on the down arrow in the first input box and select **Local settings**. This action enables all other input boxes, thus allowing you to specify your settings.

4. Click in the left Header box.

5. Click on any entry in the **Model and database attributes** list and press the **N** key twice. **Name (Model, AT_Name)** is selected in the list.

6. Double-click on **Name (Model, AT_Name)**.

7. Click in the right field of the header and then double-click on **Date** in the **Other attributes** list.

8. Click in the left field of the footer and double-click on **Page** in the **Other attributes** list.

9. Click in the right field of the footer and enter **Sales and Marketing**.

10. Click on **OK**.

11. Click on **File/Print preview** () to check the result in the print preview.

   As a result, the model name and the current date are displayed in the header of the printout, and the page number as well as **Sales and Marketing** appear in the footer.

Tip

To make further page modifications, you can open the **Page setup** dialog box from the print preview. To do this, click on the **Page setup** () button.

6.3 Starting printing

You can print the model directly based on the settings you made or check these first in the print preview.

Procedure

1. Click on **File/Print preview** (). The model appears as it will when printed.

2. Please check the settings you specified.

3. Click on the **Print** button (). The **Print** dialog box opens.

4. Check the print settings.

5. Click on **OK**. The model is printed on the selected printer.

6. Close the print preview.

To print a model from the model window, click on   **File/Print**.

7   Evaluating model contents

Report-based evaluations enable you to output the contents of user databases and models or object descriptions as text. In the following, you will evaluate the contents of the **Customer acquisition** model.

Procedure

1. Click on **Evaluate/Start report**. The Report Wizard guides you through the relevant steps.
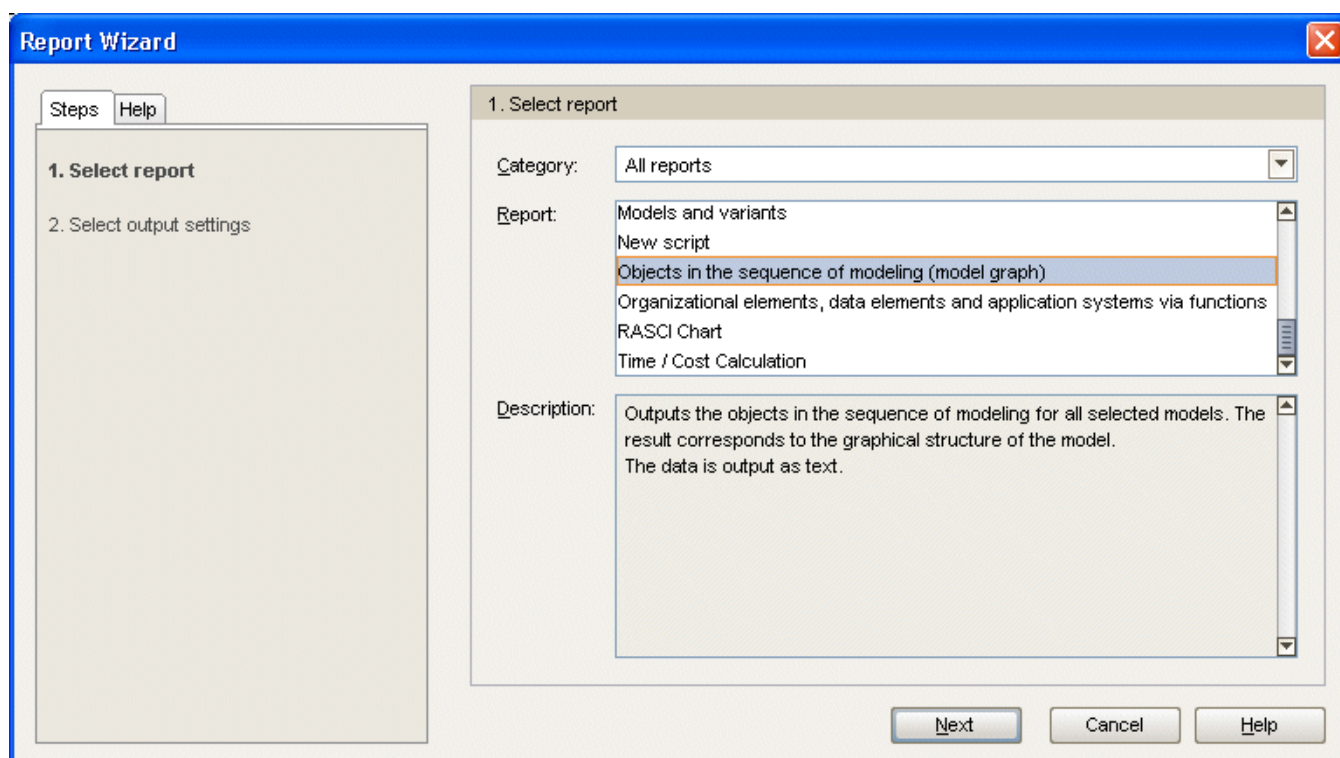
2. Select **Objects in the sequence of modeling (model graph)** in the **Report** box.

3. Click on **Next**.

4. Retain the settings for the database language and evaluation filter.

5. Select **Rich Text Format (*.RTF)** as the output format.

6. Enter a name for the report and specify where it is to be stored.

7. Enable the **Display result** check box.

8. Click on **Finish**.

9. After running the report, the **Select output options** dialog box is displayed. Click on **OK** to accept the settings.

The report is created and output in your RTF editor.

IDS SCHEER	Objects in the sequence of modeling (model graph)	ARIS Platform

Server: LOCAL
Database: Sales and Marketing
User: system

Customer acquisition EPC

Beginning of path
Launch scheduled, Event
Structurally non-relevant relationships:
Structurally relevant relationships:
activates Find addresses of potential customers

Find addresses of potential customers, Function
Structurally non-relevant relationships:
is supported by CRM system
is carried out by Sales
Structurally relevant relationships:
is activated by Launch scheduled
creates Addresses of potential customers found

10. Close the RTF editor.

8   Managing models

Various modules and functions in ARIS Business Architect enable the easy management of models. This chapter explains how to manage models with the **Explorer** module and how to use **groups** and **templates**.

8.1   Explorer

You can use the **Explorer** module to manage database content.

Procedure

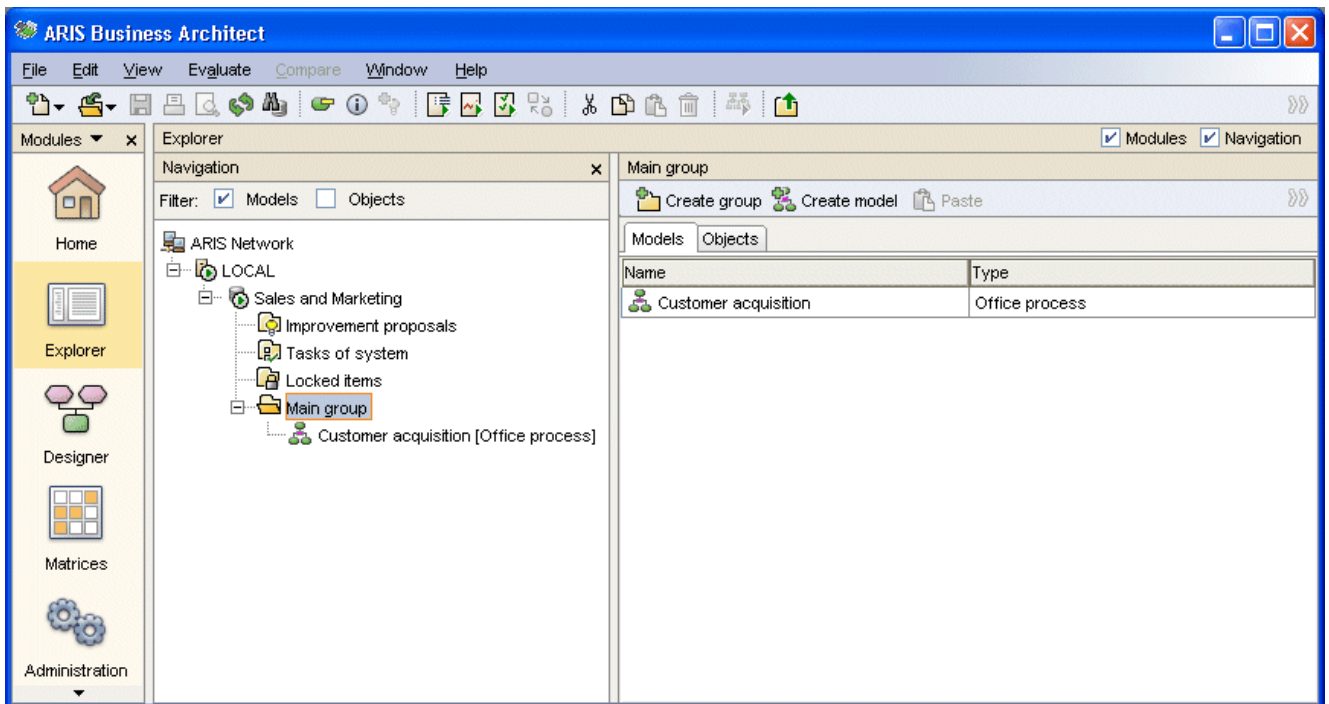1. Close the **Customer acquisition** model by clicking on the **Close** button on the tab.

    | Customer acquisition   ✕ |
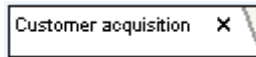
2. Click on **Explorer** in the **Modules** bar:

    If the contents of the local server are not expanded yet, click on the plus signs in front of **Local** and **Sales and Marketing** in the tree view.

3. Select the main group of the **Sales and Marketing** database.

The contents of the selected item in the tree view are displayed on tabs in the detail view. The main group of the **Sales and Marketing** database contains one model and multiple objects.

Procedure

1. Activate the **Objects** tab to display the objects.

2. Select an object and right-click in the selection.
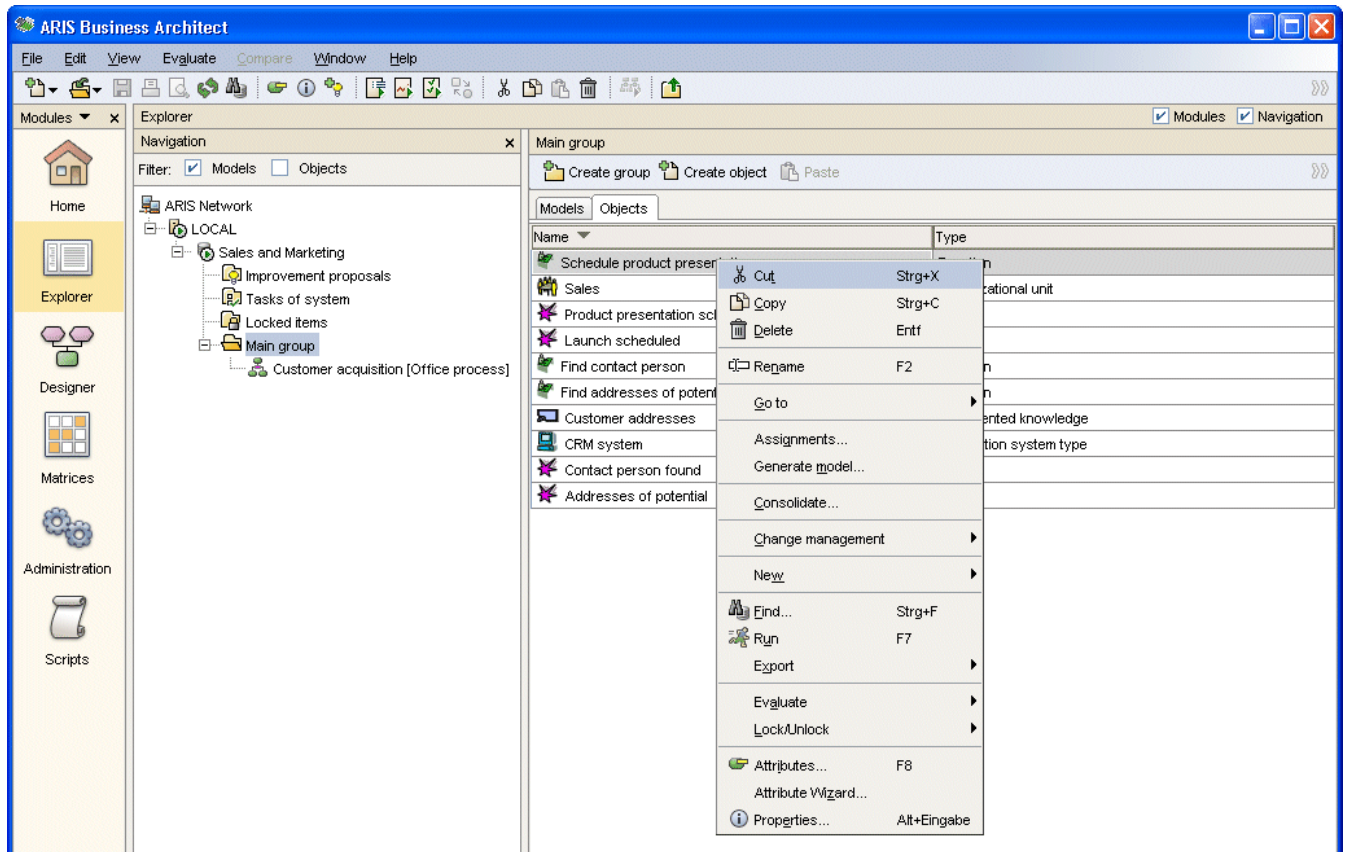
For each item, a pop-up menu is displayed that contains the main functions. The pop-up menu for objects contains the menu items shown in the above figure.

8.1.1   Renaming objects

Objects can be renamed.

Procedure

1. Right-click on the **Product presentation appointed** event.

2. Click on **Rename**.

3. Overwrite the selection with the name **Product presentation scheduled**.

4. Press Enter.

The renamed object appears in a different position on the alphabetically sorted list. The change immediately affects the graphical representation of the model. When the model is opened in the model window, the object has the new name.

8.1.2   Sorting objects

Objects can be sorted by column in ascending or descending order. When you open the detail view, the object names are sorted by default in ascending alphabetical order.

Procedure

1. Click on the **Name** column title to sort objects by name.

2. Click on the **Name** column title again to reverse the sort sequence.

8.1.3   Creating groups

Every new database contains the **Main group** folder. To save the models and objects of a database in a specific structure, you can create group hierarchies.

To create subgroups, proceed as follows.

Procedure

1. In the tree view, right-click on the **Main group** and select **New/Group**.

2. Overwrite the selection of the newly created group with the group name **Organization**.

3. Press Enter.
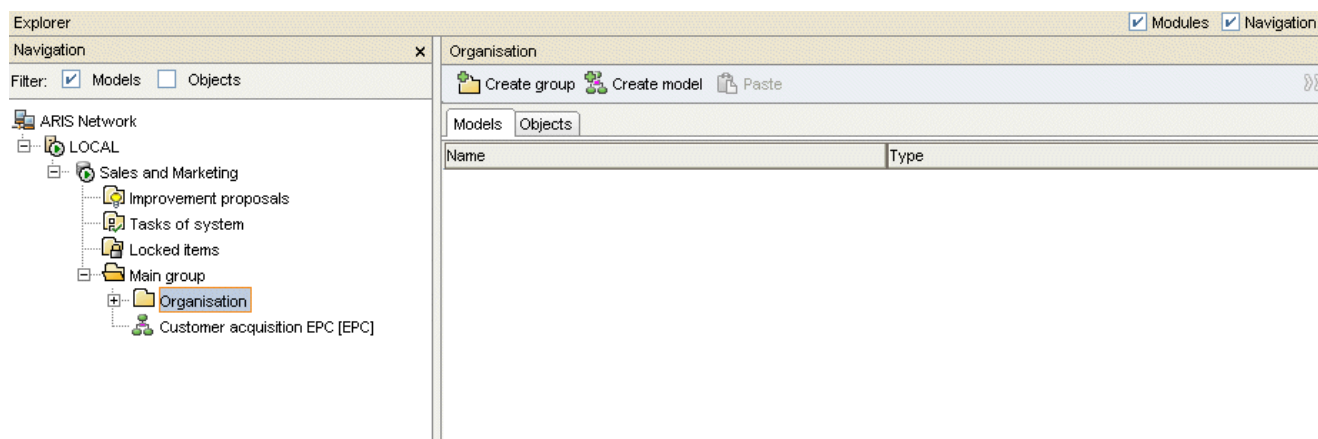
4. Repeat this procedure to create the **Processes** group.

   The **Sales and Marketing** database now has two new groups. So far, the groups do not contain any models or objects.

5. Select the main group and activate the **Models** tab.

6. Click on the **Customer acquisition** model, hold down the mouse button and drag the model to the **Processes** group. The Processes group opens and the model is stored in the group. The objects placed in the model continue to be stored in the main group.

7. To create a model in the **Organization** group, right-click on the group and select **New/Model**. The Model Wizard described in the Creating a model (Page 9) chapter opens and you can create a new model.
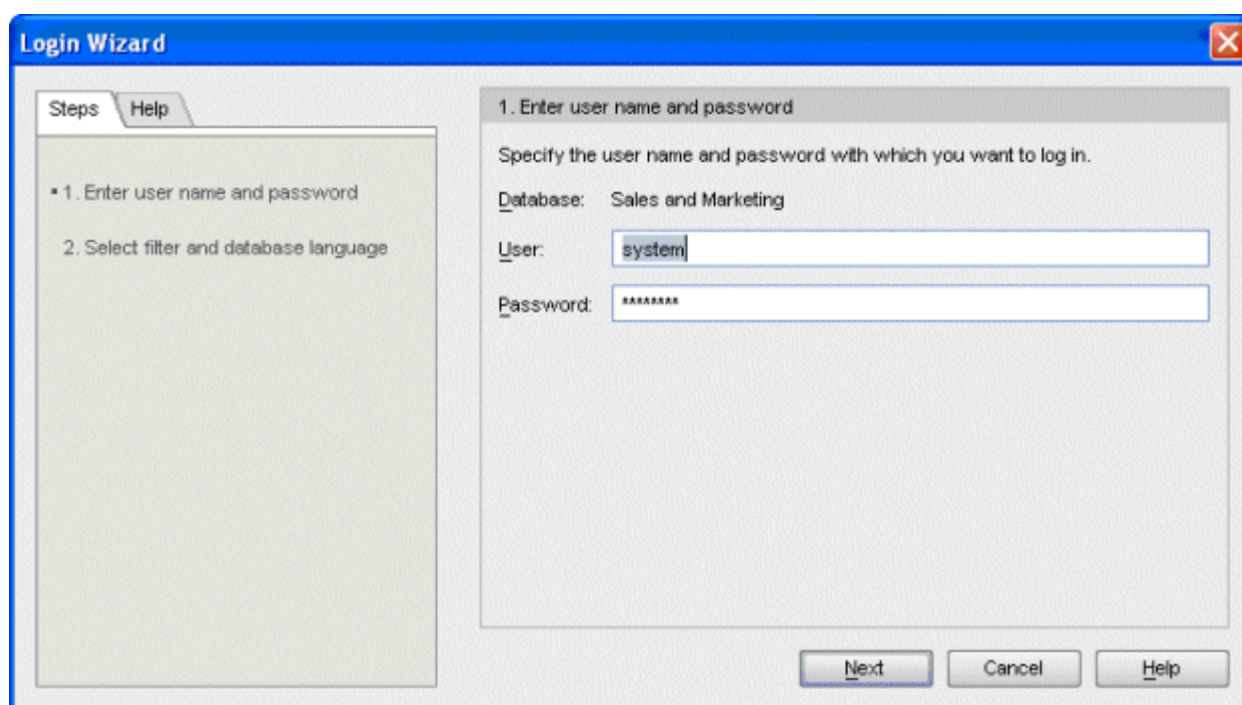
8.2   Changing method filters

You can use method filters to restrict or expand access to the model, object, attribute and connection types provided by ARIS Business Architect. If users log in to a database with a particular method filter and want to create a new model, the Model Wizard offers only the model types contained in the method filter they selected. The **Designer** module provides only those object, connection and attribute types that have previously been specified in the method filter for modeling.

Method filters help you to limit the number of available method elements to only those that you require and thus support consistent modeling.

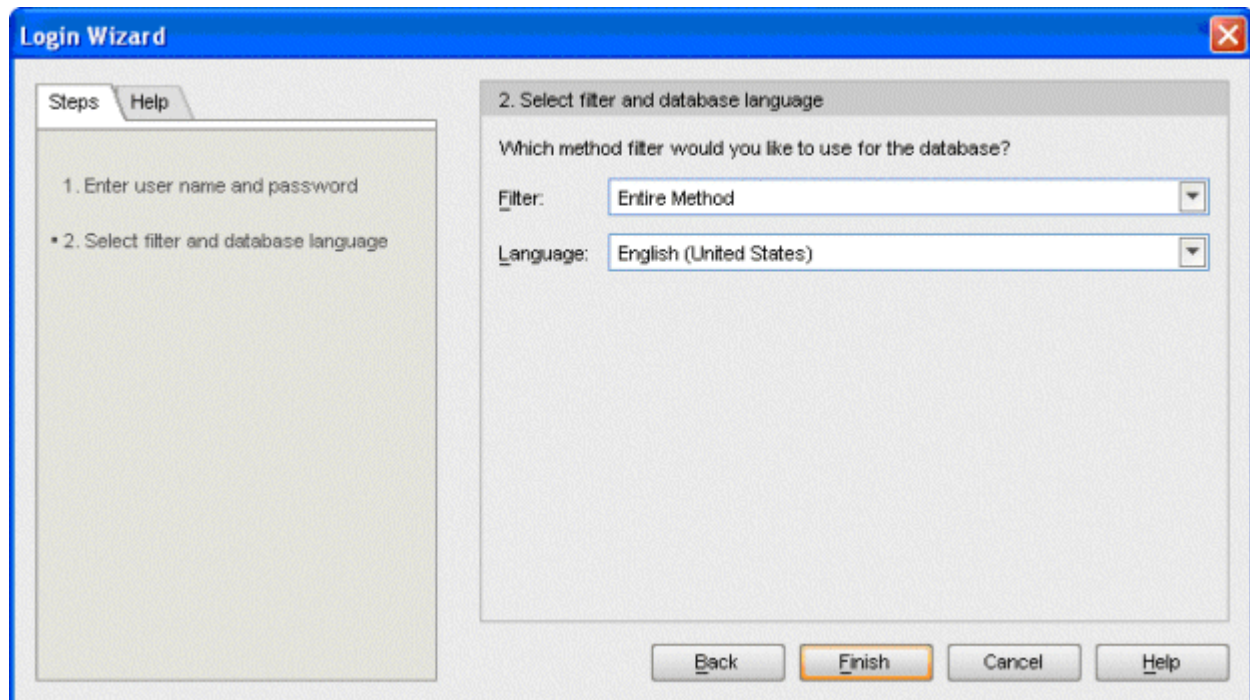You can select a different method filter for the **Sales and Marketing** database.

Procedure

1. In the Modules bar, click on **Designer**.

2. Enable the **Navigation** check box, if required.

3. In the Explorer tree, right-click on **Sales and Marketing** and select **Log out**.

4. In the Explorer tree, right-click on **Sales and Marketing** and select **Log in**.
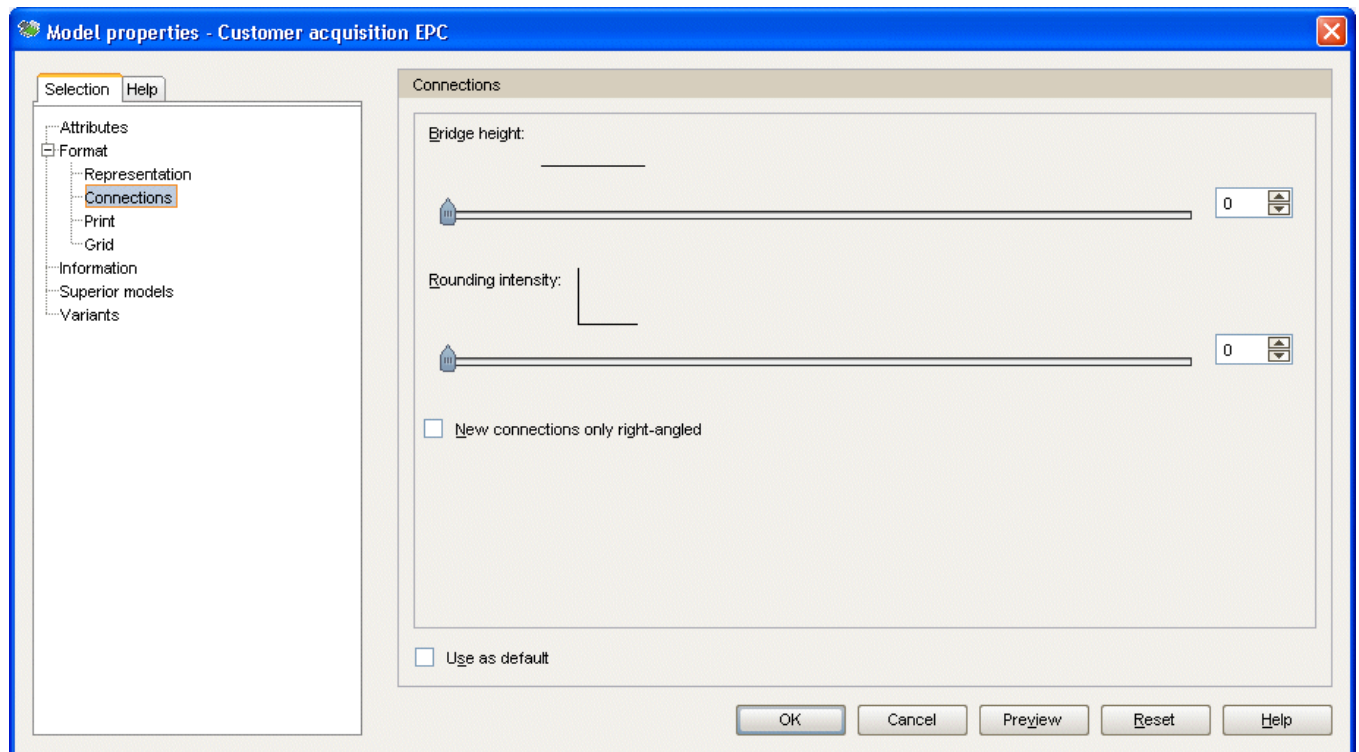

5. Click on **Next**.

6. Select the **Entire Method** method filter in the **Filter** box.

Login Wizard

Steps | Help

1. Enter user name and password

• 2. Select filter and database language

2. Select filter and database language

Which method filter would you like to use for the database?

Filter: | Entire Method

Language: | English (United States)

Back | Finish | Cancel | Help

7. Click on **Finish**.

8. Click on the plus sign in front of the **Sales and Marketing** database.

9. Click on the plus signs in front of the **Main group** and the **Processes** group.

10. Double-click on the **Customer acquisition** model. The model opens.

    As a result of changing the filter, the modeling toolbar now provides object symbols that were not available in the Easy Filter.

11. Place an object of the **Documented knowledge** type under the **CRM system** Application system type.

12. Give it the name **Customer addresses** and place this under the object (Page 23).

13. Right-click in the model background and select **Format/Connections**.

14. Disable the **New connections only right-angled** check box.

15. Click on **OK**. You can now create diagonal connections.

16. Draw a connection from the **Customer addresses** object to the **Find addresses of potential customers** function.

    To create diagonal connections in all new models, click on **View/Options**. In the tree view, click on the plus sign in front of **For new models** and select **Connections**, then disable the **New connections only right-angled** check box.

17. Turn the grid off by clicking on the **Toggle grid** button [icon].

    The grid enables you to easily place, move and align items in the model. You can set the grid width. Right-click in the model background and select **Format/Grid**. Configure the grid width.

    To change the grid settings for all new models, enable the **Use as default** check box.

The creation of the **Customer acquisition** model is now complete.

Your model now looks like this:
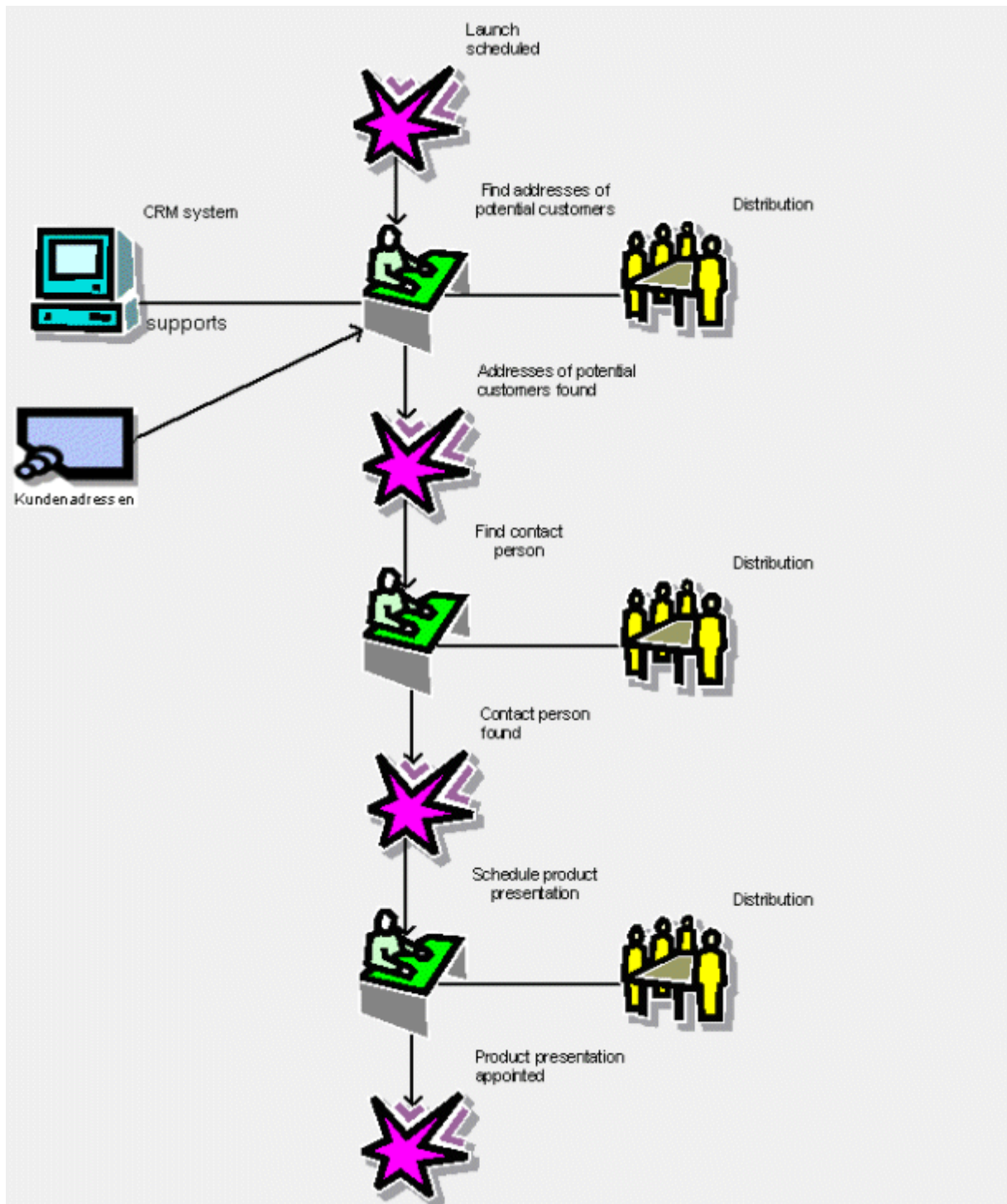
If you close the model and database and open it again with the **Easy Filter** method filter (see the beginning of this chapter), the **Customer addresses** object is displayed in a gray frame, without color and without a name.
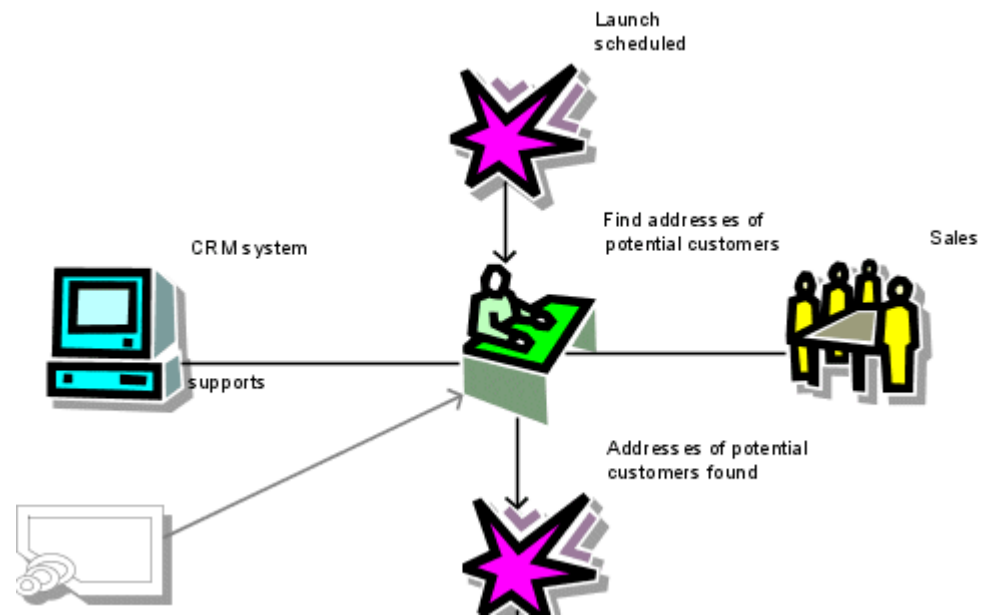
You cannot access the object or the connection that leads from this object to the **Find addresses of potential customers** function. Both are mapped in the Easy Filter merely to represent the overall layout so that you can see which objects have already been created. This information is important if various users in a project can access the same models, but do so with different privileges and method filters.

Open the **Sales and Marketing** database and the **Customer acquisition** model again with the **Entire method** method filter to restore access to all objects and connections.

| 8.3	Copying objects and converting symbols

In this example, you create a model of the **EPC** (event-controlled process chain) type from the graphical representation of your **Customer acquisition** office process.

Procedure

1. Right-click in the model background and select **Select/Select all**.

2. Click on **Edit/Copy** ().

3. Click on **File/New/Model** ().

   a. Select the **Processes** group of your database and click on **Next**.

   b. Select the **EPC** model type and enter **Customer acquisition - EPC** as the model name.

   c. Click on **Finish**.

4. Click on **Edit/Insert** ().

5. Click in the model background to paste the copied content.

6. Optimize the arrangement of the symbols in your model. Place the names of the objects in the middle of the objects. To make the names fit within the objects, select all objects (**Select/Select all of this kind**), open the properties dialog box via **Format/Representation** and enter appropriate values to increase the size of the objects. Alternatively, you can insert soft hyphens in the object names (**Ctrl + Enter**).

7. Turn the grid off by clicking on the **Toggle grid** button ⦚. Your model should look like this now:
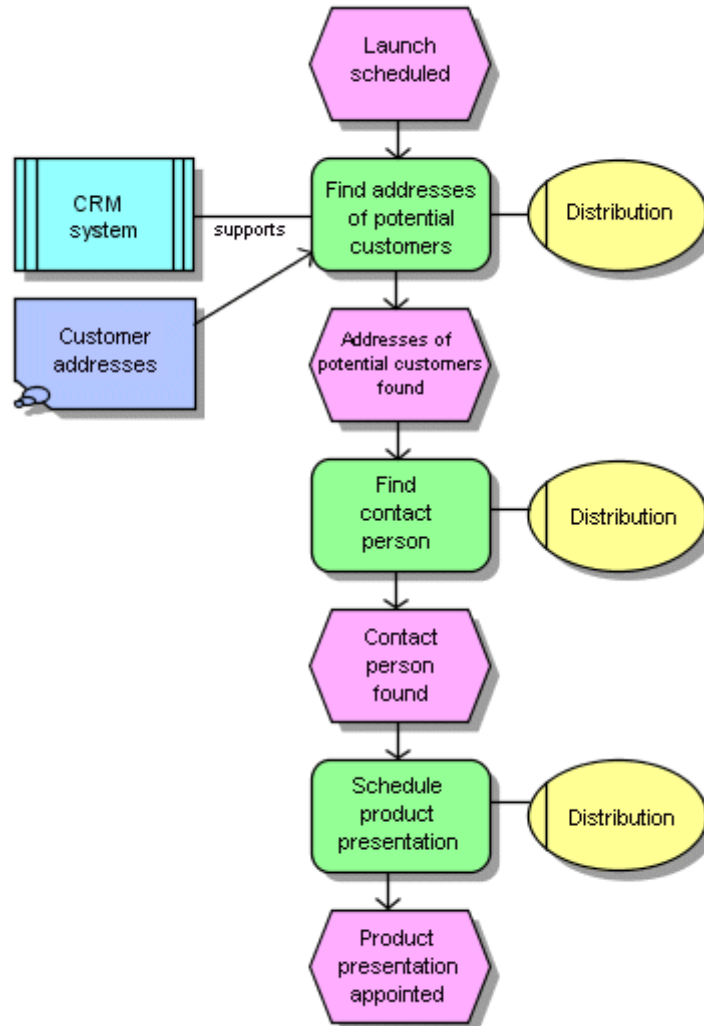
The **Customer addresses** object is incorporated only if you do not use the **Easy Filter**, but a filter that permits the object (e.g., Entire Method).

8.4 Applying a template

You can use templates that you can modify or create yourself to change the appearance of your models. For example, you can adapt the representation to your corporate design or prepare it for presentation purposes.

The **Standard** template is already assigned to your EPC. In the following, you will assign the **Presentation 130** template to the EPC. The template zooms in on the objects and brightens the colors.

Procedure

1. Right-click in the model background and then on **Format/Representation**.
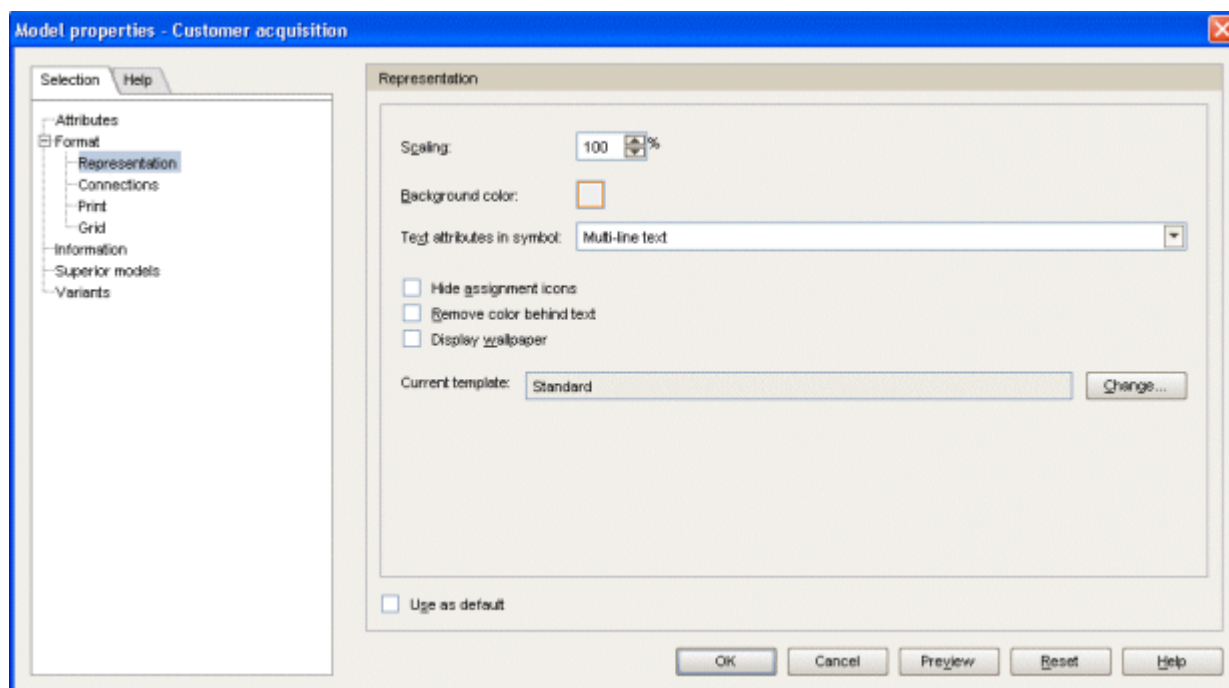
2. Click on the **Change** button next to the **Current template** box. The **Select template** dialog box opens.

3. Click on **Reset**. If you do not remove the template before assigning a new template, the templates are combined.

4. Click on **OK**.

5. When you are asked if the template is to be applied to all model elements, click on **Yes**.

6. Click on **OK**.

7. Right-click in the model background and then on
Format/Representation.

8. Click on the **Change** button next to the **Current template** box. The
Select template dialog box opens.

9. Click on **Presentation 130** in the **Select template** dialog box.

10. Click on **OK**.

11. When you are asked if the template is to be applied to all model
elements, click on **Yes**.

12. Click on **OK**.
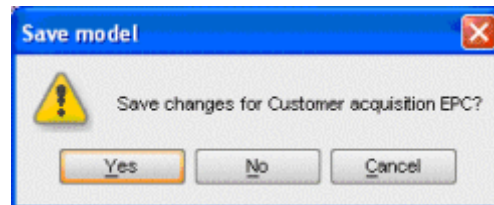
Your EPC should look like this now:
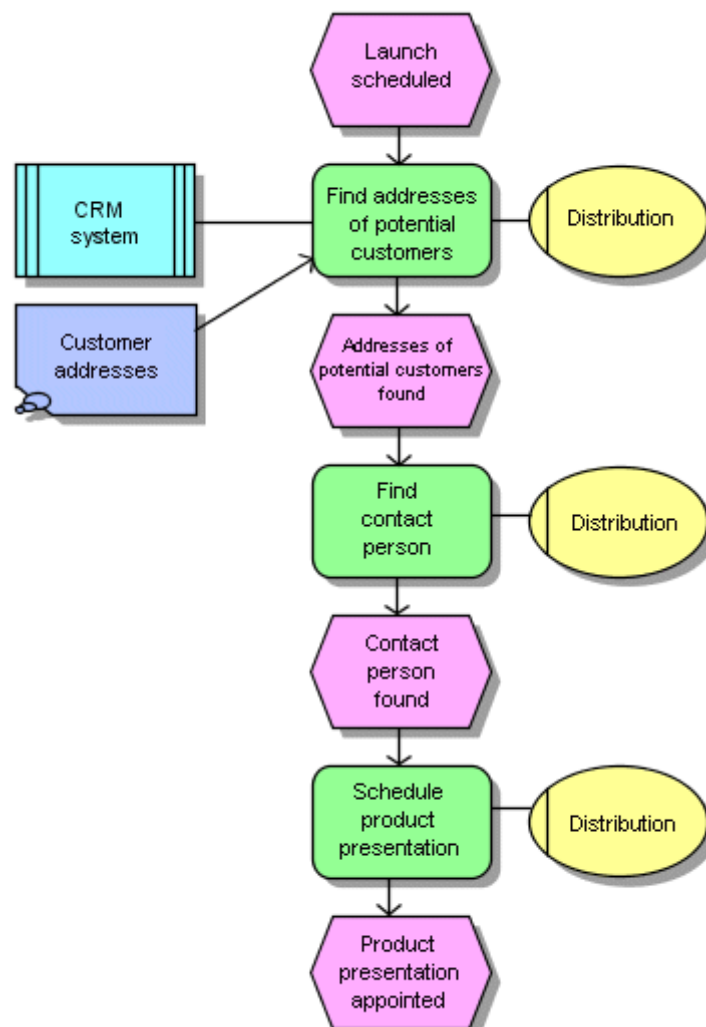
9   Exiting the program

Click on **File/Exit**.

If changes to a model have already been saved, the model closes without a save prompt.

If you make changes to a model and then close it without saving the changes, you are asked whether you want to save.

Click on **Yes** to save the changes, or on **No** to discard them.

Click on **Cancel** if you are not sure whether or not to save the changes. In this case, the program does not close and you can check the model and edit the contents of the window again if necessary.

10   Appendix-Basic settings

To utilize this Quick Start Guide to its full potential, you should be able to access a standard installation, including the default filter and user settings.

Detailed information on how to install ARIS Business Architect is provided in the Installation Guide.

If you enabled the default settings, double-clicking on a database in the **Explorer tree** will log you in as a system manager with the **Demo database** filter. To check the settings, click on **View/Options**. Click on **Log in** on the **Selection** tab. Check that the following settings have been made. If they have not already been made, make the following settings now:

- Enable the **Use defaults** check box.

- Enter the user name **system**.

- Enter the password **manager** in the **User Defaults** area. Enter this password after the initial installation. Passwords are always displayed as asterisks to ensure that no one but you is able to read them.

- You will change method filters when working through the Quick Start Guide.

- Enter **DBADMIN** as the password for the database administrator. Enter this password after the initial installation. Passwords are always displayed as asterisks to ensure that no one but you is able to read them.

Note

It is recommended that you change the passwords if various users are to be granted only restricted access to data or the range of functions and administration tasks.

If the passwords have already been changed and you do not know what they are, please contact your system administrator.