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QUICK START GUIDE

ARIS CONNECT DESIGNER

VERSION 10.0 - SERVICE RELEASE 16

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This document applies to ARIS Version 10.0 and to all subsequent releases.

Specifications contained herein are subject to change and these changes will be reported in subsequent release notes or new editions.

Contents

1 Before you start

The ARIS Connect Designer quick start introduces you to the basic functions of ARIS Connect Designer. Using simple examples, you learn about important workflows for creating models, as well as for evaluating model content.

After specifying the required settings, you will first create a model of the **EPC** type and then evaluate it with a report.

Your work with ARIS Connect Designer can be divided into the following phases:

The Quick Start Guide guides you step by step through the required workflow.

If you have questions about working with ARIS Connect Designer, activate the **ARIS Advanced** tab, click your user name, then **Help**, and visit the **Model** area of the online help.

The screenshots in this manual may differ from your program interface because your system may be customized and/or various features may be provided in ARIS Connect depending on your license.

2 Prerequisites

The following points are assumed.

- You have an **ARIS Connect Designer** license and the necessary privileges in the system.
- You have **Read**, **Write**, and **Delete** database privileges for the database group in which you want to create the sample model.
- You have the access data for ARIS Connect, that is, user name, password, and a link to the start page of ARIS Connect. This link should have been provided to you by your system administrator.

If in doubt, please contact your system administrator.

3 Start ARIS Connect

This description assumes that the prerequisites for working with ARIS Connect (page 2) are fulfilled.

Procedure

1. Click the link to ARIS Connect or enter it in the address bar of your browser. The ARIS Connect start page opens.
2. Enter your user name and your password.
3. Click **Log in**.

ARIS Connect opens.

4 Create model and specify settings

On the following pages, you will learn how to create your first model and make modeling settings.

4.1 Create a model

To create the **Customer acquisition** EPC, proceed as follows.

Procedure

1. Click ⠿ **Application launcher >** ▤ **Models & Objects**.

2. Click [Create model] **Create model**. The **Create model** dialog opens.

3. Enter the model name **Customer acquisition**.

4. Press **Tab** on the keyboard. The cursor jumps to the **Model type** box.

5. Enter **ep**. The list shows all model types that have **ep** in their name.

6. Click **EPC**.

7. Click 📁 **Group**. The **Select target group** dialog opens.

8. Navigate to the group in which you want to save the model and click **OK**. The **Select target group** dialog is closed.

9. Click **OK**.

The **Create model** dialog closes and the newly created model is opened in a new tab. The functionality of ARIS Connect Designer is available.

4.2   Hide grid

Generally, you do not need the grid if you use Guided Modeling and Smart Modeling.

Guided Modeling provides lines and arrows that inform you about the orientation and distance of the items from adjacent items when you place or move objects and connections.

Smart Modeling provides automatic modeling features, such as creating a space for new objects, placing objects, and reconnecting connections.

Therefore, switch off the grid.

Procedure

1.   Activate the **Model** tab bar.
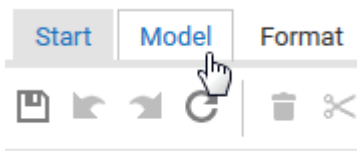
2.   Click ▦ **Modeling area >** ✔ **Use grid**. The ☐ check box is disabled.

The grid is hidden.

4.3   Set up default distance

With Smart Modeling, objects are automatically placed in the specified default distance. Also, Guided Modeling displays the default distance with a specific cursor (↔) when you move objects. Smart Modeling and Guided Modeling are enabled by default.

Procedure

1. In the activated **Model** tab bar, click **Layout**. The layout options are provided.

2. Enter the value **20** for **Horizontal item spacing** and retain **10** for **Vertical item spacing**.

3. Click **OK**.

When you create a model with Smart Modeling, the objects are placed at the set distance.
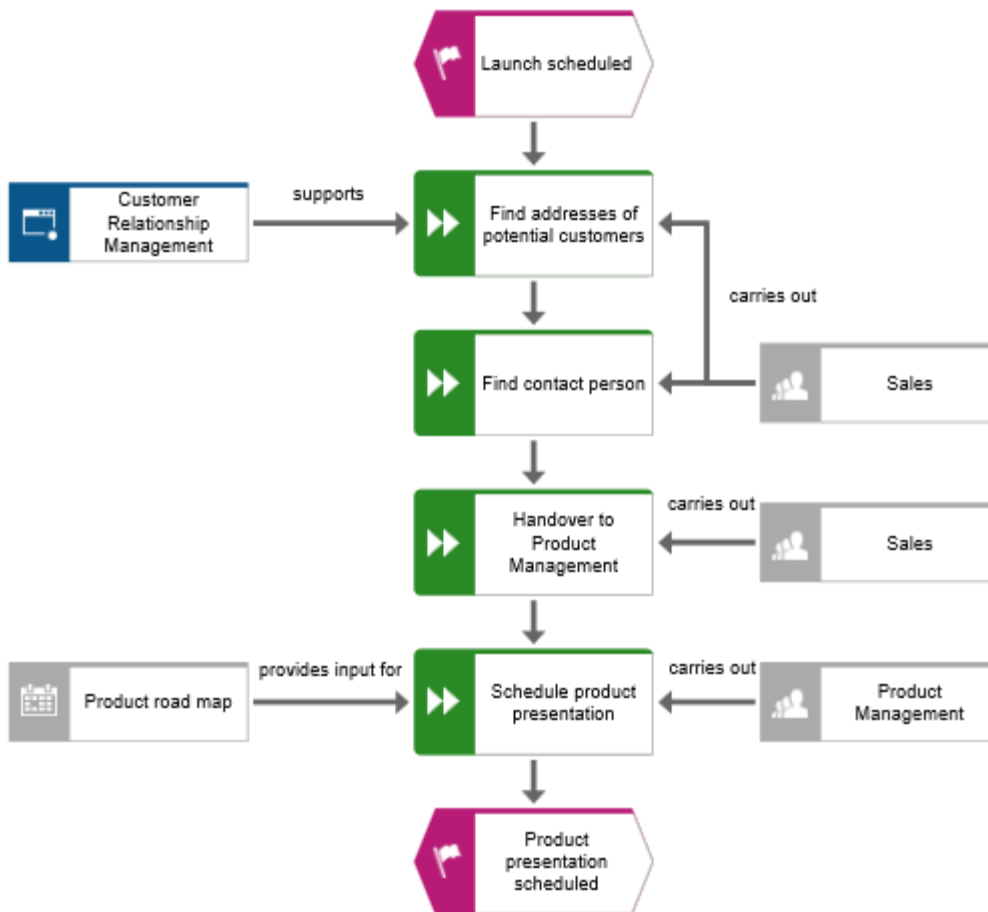
4.4   Model

In the following sections, you place objects in your model and edit object attributes.

Please note: If you create the model in a database that contains objects when you enter object names, you will get name suggestions if a name begins with the letters you entered. Ignore these suggestions.

Your model will look like this after completion:

4.4.1 Create the basic control flow model

In this section, you create the basic control flow model, which includes the required work steps in the correct sequence.

Procedure

1. Click the ▣ **Event** symbol in the **Symbols** bar and hold down the mouse button. An event shows that a certain state has occurred.

2. Drag the mouse pointer to the position you want to place the object in the modeling area.
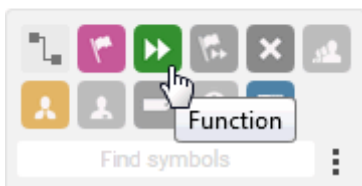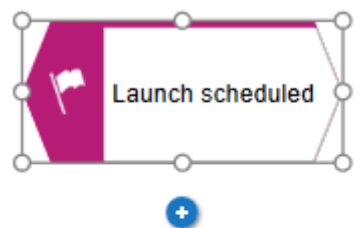

3. Release the mouse button. The object is placed, and its name is selected for overwriting.

4. Enter a name for the event by overtyping the selection with **Launch scheduled** and press **Enter**.
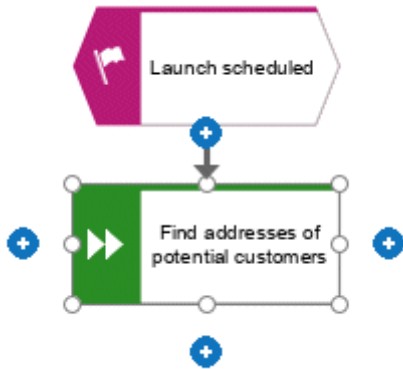

5. Click ⊕ **Insert at the bottom** under the **Launch scheduled** event.

6. Click ▶▶ **Function**. The function is placed in the default distance to the event and the name is selected for overwriting.

7. Since a function indicates that an activity must be performed, type **Find addresses of potential customers** and press **Enter**.

8. Create the following objects one below the other in the same way:

   a. ▶▶ Function: Find contact person

   b. ▶▶ Function: Schedule product presentation

   c. ⚑ Event: Product presentation scheduled

The basic control flow model, which includes the required work steps in the correct sequence, is completed.
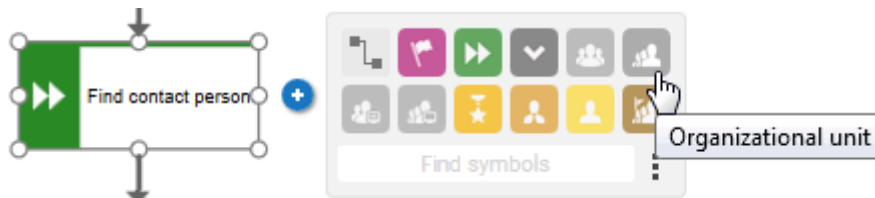
4.4.2 Assign work steps to organizational units

In this section, you assign the work steps (functions) to the organizational units that are to execute the functions.
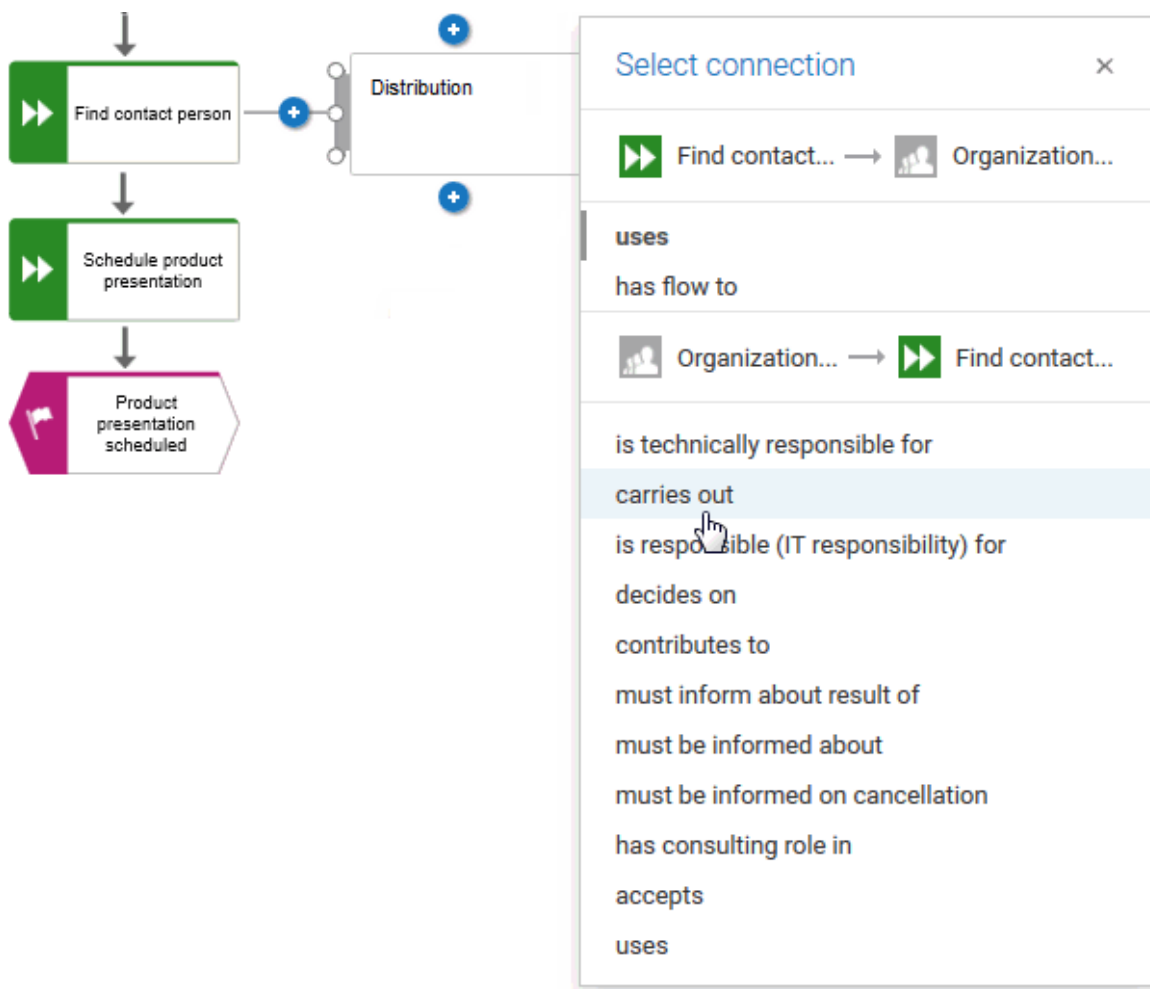
Procedure

1. Click the **Find contact person** function and then ⊕ **Insert to the right**.
2. Click **Organizational unit**.

There are various connections available to connect the work step (function) and the organizational unit.

3. Enter the name **Distribution** and click **carries out**.
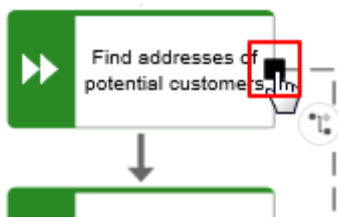
The organizational unit is placed.

Not only the **Find contact person** work step, but also the **Find addresses of potential customers** work step is performed by the **Distribution** organizational unit. Therefore, connect **Distribution** with **Find addresses of potential customers**.

4. Click the **Distribution** organizational unit and then click ⊕ **Insert to the left** and hold down the mouse button.

5. Move the mouse pointer to the border of the **Find addresses of potential customers** function. While you move the mouse pointer, the Guided modeling line helps you to connect the connection centrally to the side of the object.
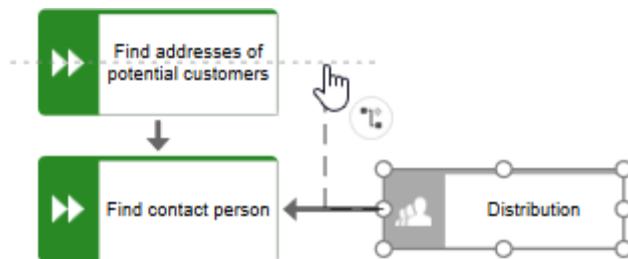
6. Release the mouse button when the connection anchor point is displayed.

The connection selection is displayed.

7. Click **carries out**.

8. Now assign the function **Schedule product presentation** in the same way to the organizational unit **Product Management** as you assigned **Find contact person** to **Distribution**. The connection **carries out** is already selected, so click in the modeling area to finish. Your model now looks as shown.
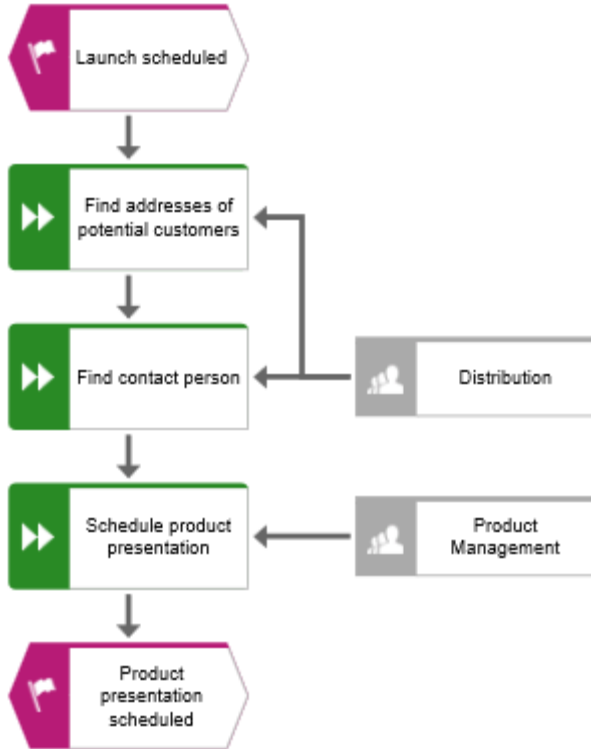
You have assigned the work steps to organizational units.

4.4.3   Insert a missing object

In this section, you use drag and drop to insert a missing object.

As you inserted the object **Product Management**, you noticed that the handover between the organizational units is not modeled. Do this now.

Procedure

1. Click the ▶▶ **Function** symbol in the **Symbols** bar and hold down the mouse button.

2. Move the mouse pointer over the connection between the functions **Find contact person** and **Schedule product presentation**. The connection is colored green.
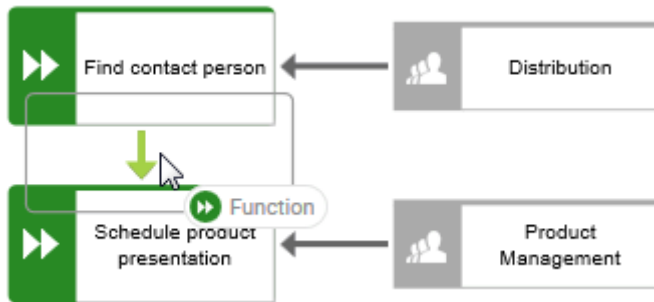
3. Release the mouse button. In one step the object is placed, the connection between the functions **Find contact person** and **Schedule product presentation** is removed, and connections from the new object to **Find contact person** and **Schedule product presentation** are created.

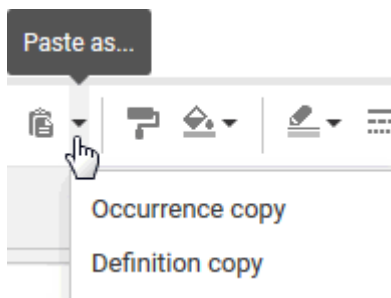4. Enter **Handover to Product Management** and press **Enter**.

The missing object is inserted.

4.4.4   Create object occurrences

Of course, the **Distribution** organizational unit is also responsible for the **Handover to Product Management** step. To structure your model clearly, create an occurrence of the **Distribution** object beside the function **Handover to Product Management**. Object occurrences are copies of object symbols that represent the same object in one or more models. Each occurrence of the **Distribution** object you have created represents the object you have already created in this model. If you change an attribute, for example, the name of an occurrence, the names of all occurrences of this object change.

Procedure

1. Select the **Distribution** object and click 📋 **Copy** in the **Model** tab bar.

2. Click the ▼ down arrow of 📋 **Paste** and then **Occurrence copy**.

A preview frame of the object is displayed in the modeling area.

3. Move the mouse pointer beside the **Handover to Product Management** object. Lines indicate the distance and orientation of the moving object from the other objects.

4. Click this position.
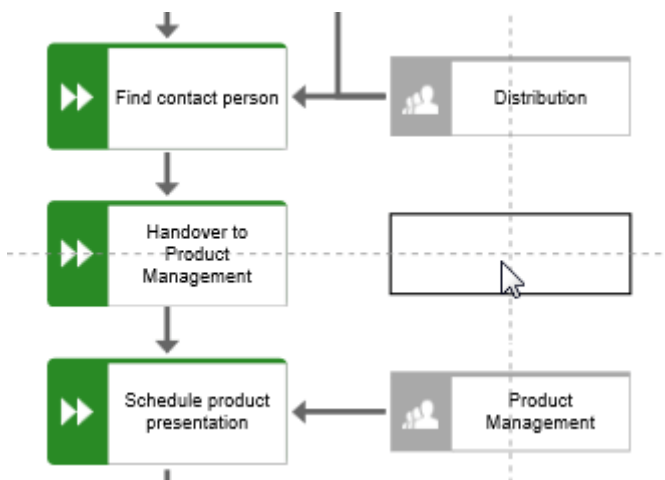
The **Distribution** occurrence copy is placed, selected, and the ⊕ **Insert** icons are displayed.

5. Click ⊕ **Insert to the left** and hold down the mouse button.

6. Move the mouse pointer to the border of the **Handover to Product Management** function and release the mouse button when the connection anchor point is displayed.
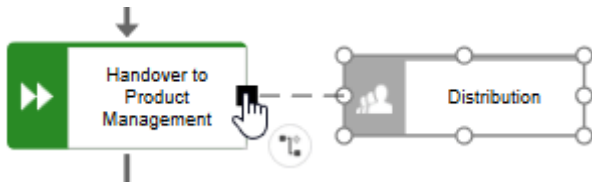
The connection selection is displayed.

7. Click **carries out**.

The occurrence copy is created and connected to the work step.
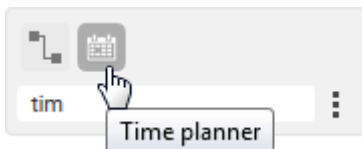
4.4.5   Assign supporting systems

In this section, you assign the systems that support the work steps.

Procedure

1. Click the **Find addresses of potential customers** function and then ⊕ **Insert to the left**.

2. Because the application system is not listed in the **Smart Modeling** toolbar, enter **app** in the **Find symbols** box. The **Application** object symbols are displayed.
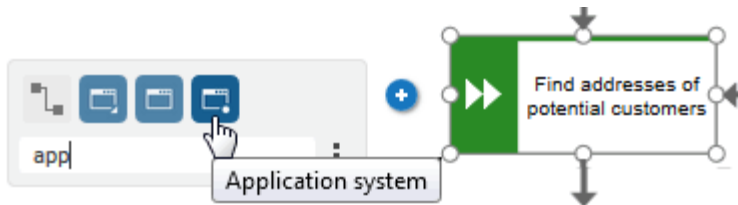
3. Click **Application system**. The application system is placed.

4. Enter the name **Customer Relationship Management**. The supporting system is placed.

5. Click the **Schedule product presentation** function and then ⊕ **Insert to the left**.

6. Because the **Time planner** object is not listed in the **Smart Modeling** toolbar, enter **tim** in the **Find symbols** box. The **Time planner** object symbol is displayed.
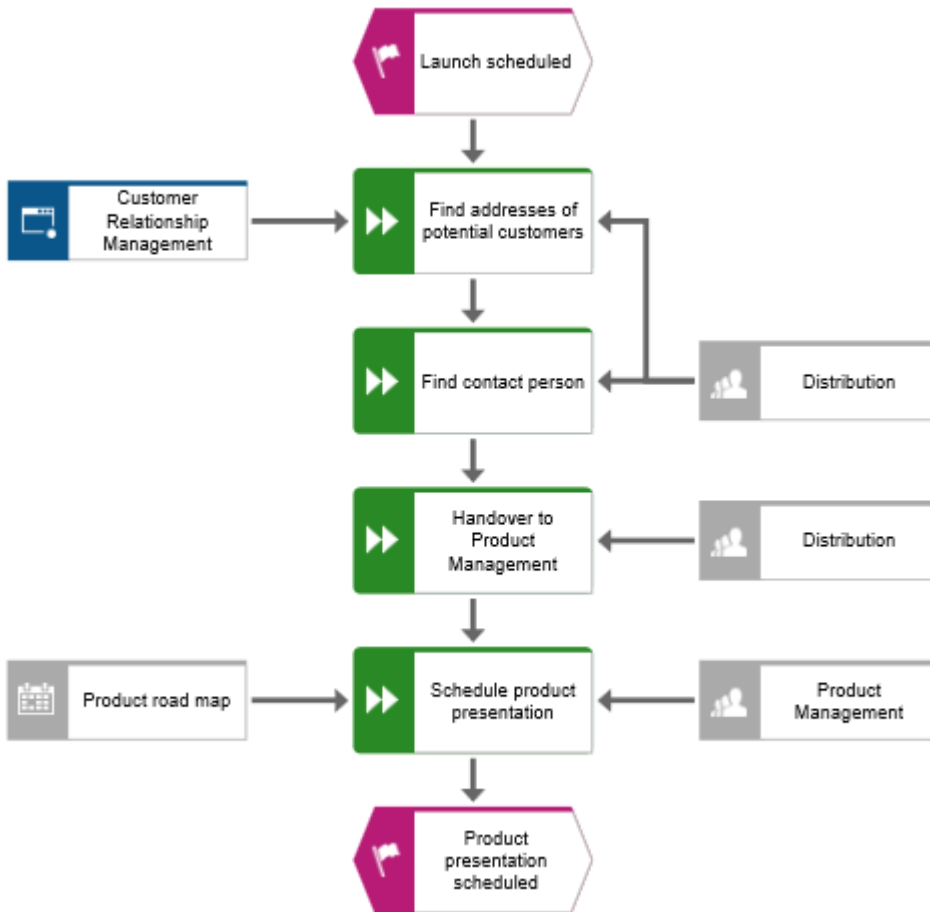

7. Click **Time planner**.

8. Enter the name **Product road map** and click the **provides input for** connection.

The supporting systems are assigned. The current model looks like this:

Object symbols that are placed using the **Find symbols** box of the **Smart Modeling** toolbar are automatically added to the **Smart Modeling** toolbar for the respective object. Therefore, the object symbols of the application system and the time planner are now available in the **Smart Modeling** toolbar for objects of type **Function**.
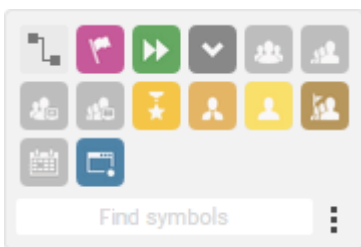
You can configure the **Smart Modeling** toolbar (page 17).

4.4.6   Configure Smart Modeling toolbar

In this section, you customize the **Smart Modeling** toolbar to your needs. In the following procedure, you can click any ⊕ **Insert** button of any function object, since you do not change the model, but only the number of object symbols that the **Smart Modeling** toolbar provides for functions.

Procedure

1.   Click a function and click any ⊕ **Insert** button.

2.   Click ⋮ **Configure > Remove symbols from toolbar**.
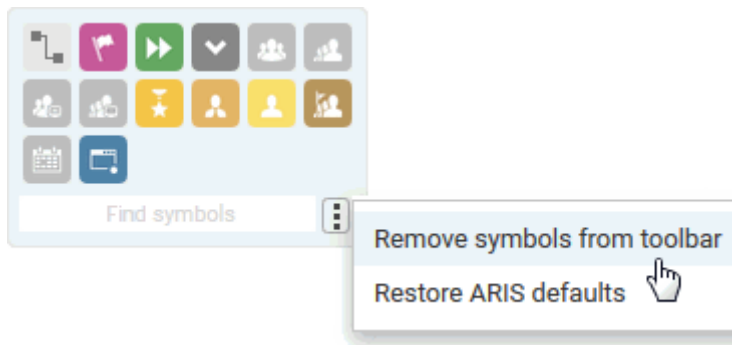
The available object symbols are marked by remove icons.

3.   Click the object symbols you want to remove. They are grayed and their ⊗ remove icons are highlighted.
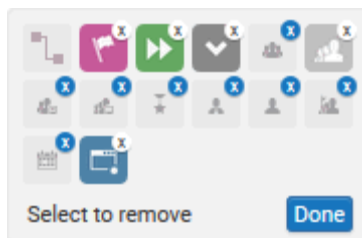
If you want to exclude an already selected object symbol from removal, click the object symbol again.

4.   Click **Done**.

The selected object symbols are removed from the **Smart Modeling** toolbar. If you click the ⊕ **Insert** button of an object of **Function** type, the following object symbols are now offered.
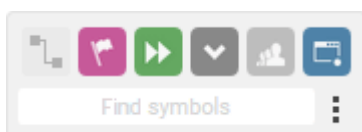
4.4.7 Rename objects

You can change object names directly in the model. If you change a name attribute, all occurrences of the object (page 13) in the database are renamed accordingly.

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

Procedure

1. Select one of the **Distribution** symbols and click the symbol name again. The name is selected and can be overwritten.

2. Enter **Sales** and click in the modeling area.

The name of the organizational unit is now **Sales** and both occurrences of the object are displayed with the new name.
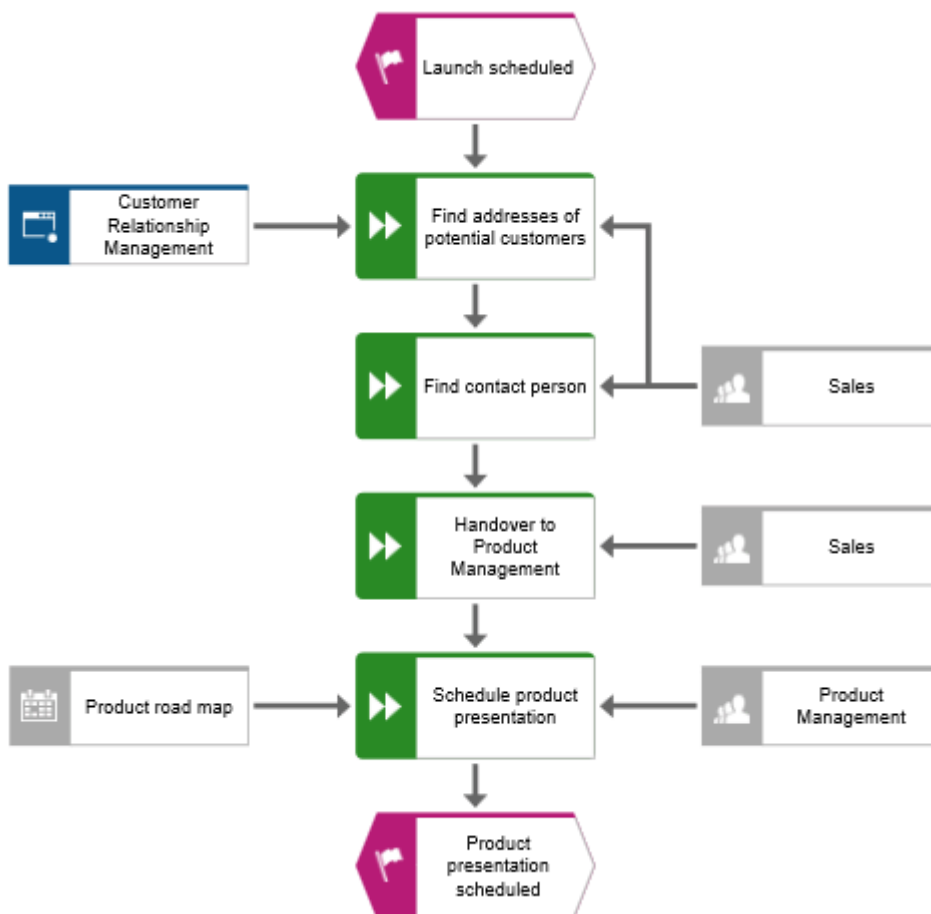
4.4.8   Place attributes

You can display the attributes of objects and connections in your model. Now, you will display connection types.

Procedure

1. Select the connection between the **Sales** and **Find addresses of potential customers**.

2. Click ⬜ **Attribute placement** in the **Start** tab bar.

3. Click **Create attribute placement**.
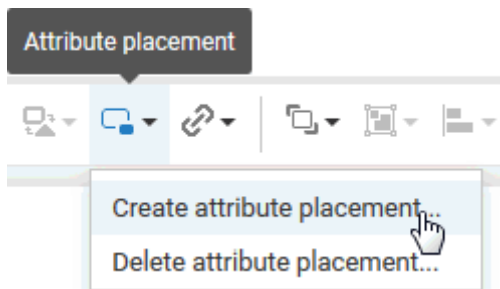
The **Select attribute** dialog opens. Enable the **Show specified attributes only** check box and enable **Type**.
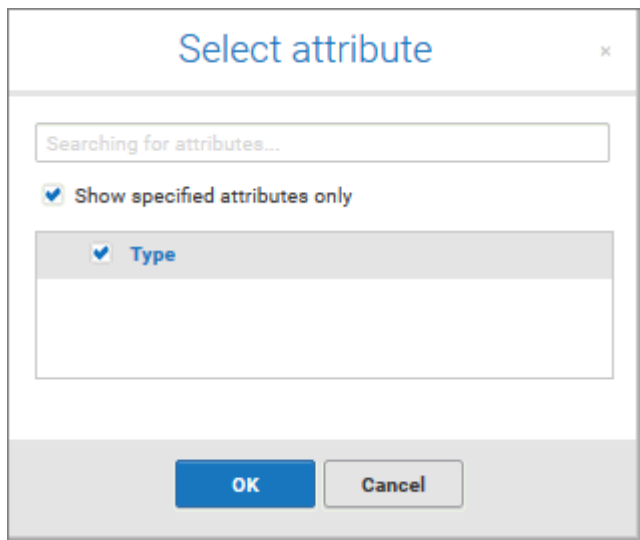
4. Click **OK**. The dialog closes and a preview frame for the attribute to be placed is displayed at the mouse pointer.

5. Drag the attribute to the selected connection and click the position at which you want to place it. It is displayed in the modeling area.

6. Click the object **Customer Relationship Management**, press the **Ctrl** key, and click **Product road map.** Release the **Ctrl** key and drag the selected objects to the left. This ensures that the model layout is preserved and that there is enough space between the objects **Product road map** and **Schedule product presentation** to place the **Type** attribute of the connection **provides input for**.

7. Place the attributes for the connections between all functions and the organizational units and supporting systems as you did the first time.

You have completed the model. Your model now looks like this:
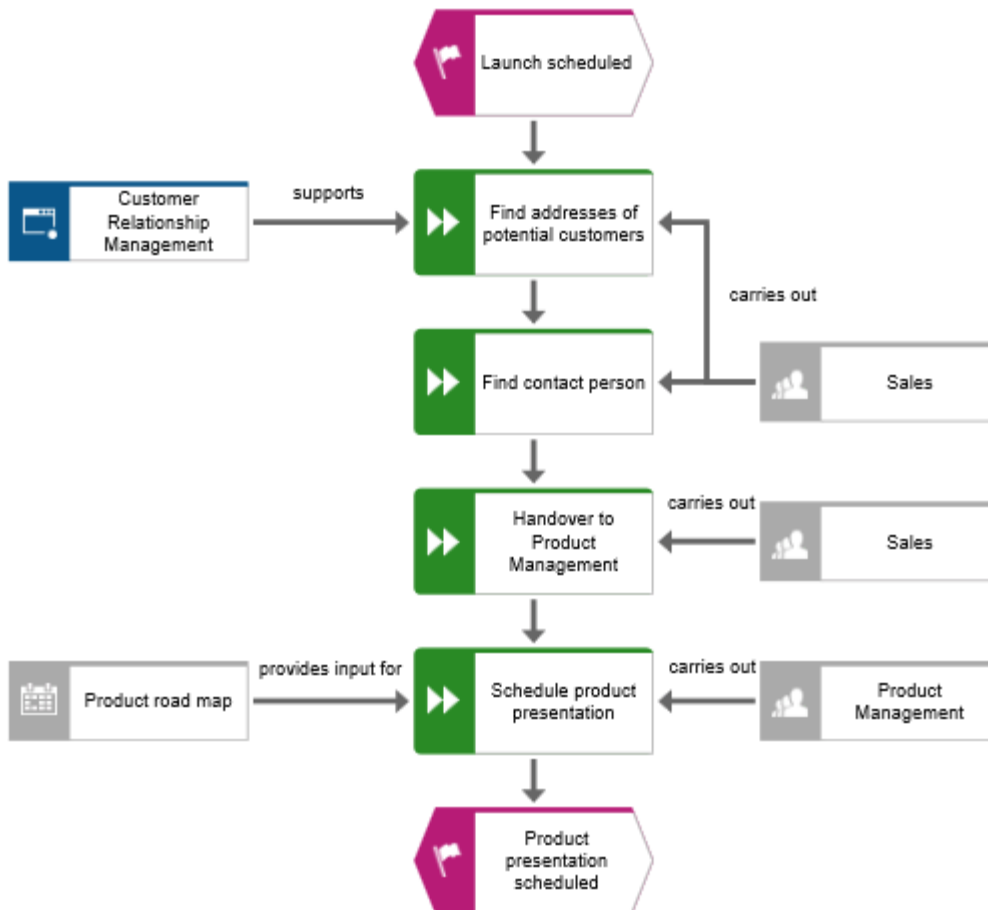
4.5 Save and close model

You have finished the model.

1. To save your work, click 💾 **Save** in the **Start** tab bar.

    The model is saved, and you are informed about the result.

    Model 'Customer acquisition' was successfully saved.   ×

2. Click ✕ **Close** on the model tab.

    ⛓ Customer acquisition   ✕
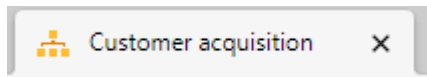
The model tab is closed.

4.6 Close the model

You have created the model. Now you can close it.

Procedure

1. Click ✕ **Close** on the model tab.

    ⛓ Customer acquisition   ✕
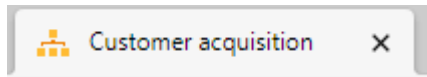
    If you have not yet saved the model, an information dialog opens. Depending on the browser, various buttons are offered to close the dialog and return to the tab for saving.

2. For example, click **Stay on Page** and save the model (page 21).

3. Click ✕ **Close** on the model tab again.

The model tab is closed.

5 Output model

You can create a PDF file of your model.

Procedure

1. After closing the model tab, activate the **ARIS Connect** tab if it is not already activated.

2. Enable the check box of the **Customer acquisition** model.
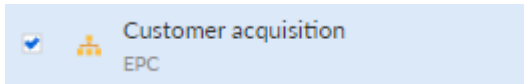
3. Click 📊 **Reports**. The **Reports** bar opens.

4. Select the report **Export graphic as a PDF (with preview)**.
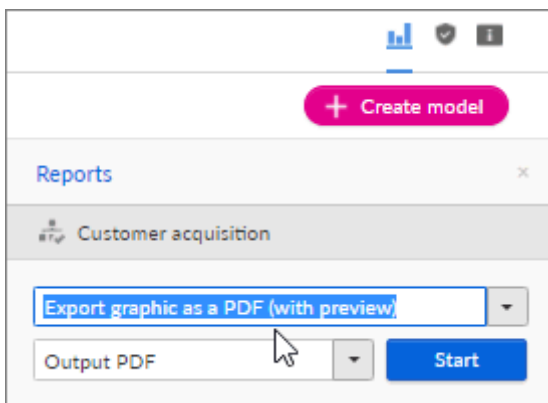
5. Click **Start**. The report is executed and the **Select output options** dialog opens.
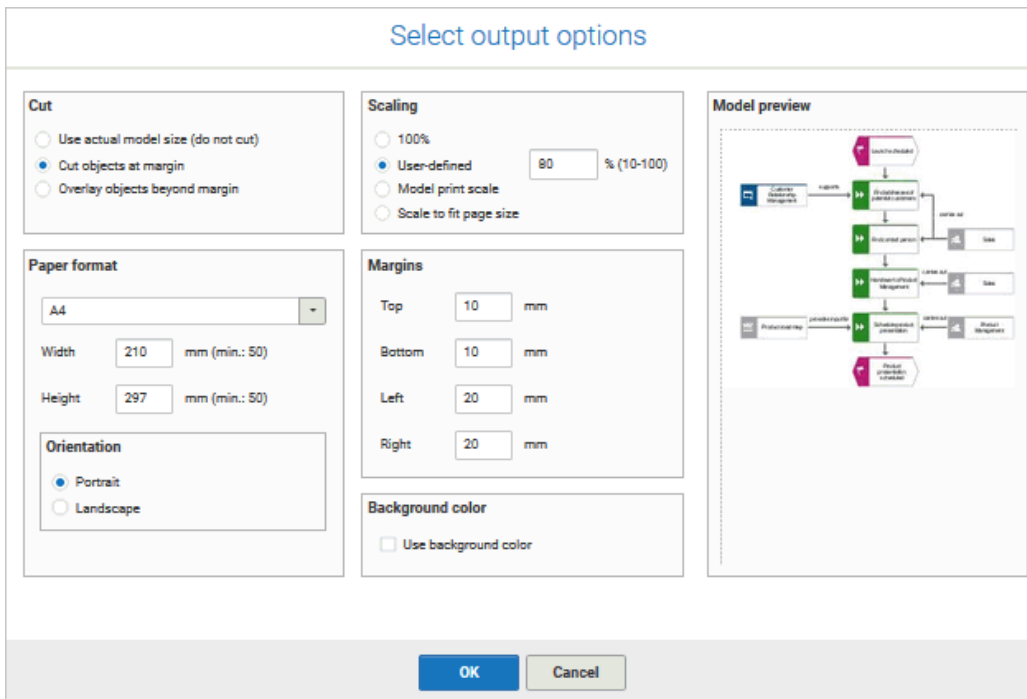
6. Set up the output. For example, you can specify that objects placed on margins should be cut or that the output model size should be 80 %.

7. Click **OK**.

8. The PDF file is created. In the **Reports** bar, the report execution is listed. The result dialog opens and you can download the PDF file.
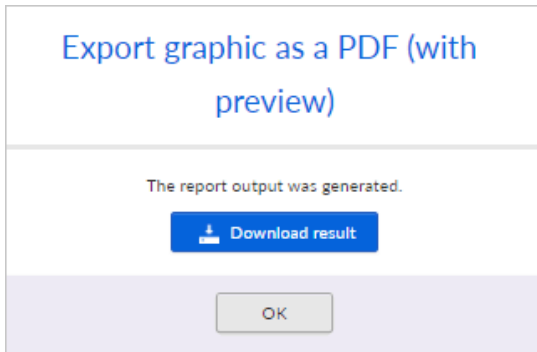
9. Click **Download result**. Depending on your browser settings, the PDF file is saved in your **Download** folder or you can select the folder in which you want to save the PDF file. The PDF file is downloaded.

10. If you do not want to download the PDF file immediately, you can close the result dialog and download the PDF file later from the **Reports** bar.
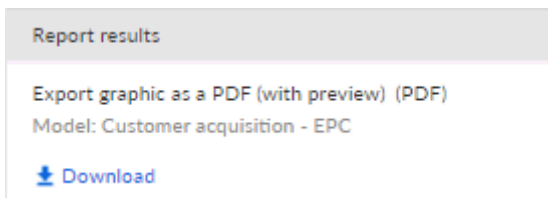
You have created a PDF file from your model.

6 Legal information

6.1 Documentation scope

The information provided describes the settings and features as they were at the time of publishing. Since documentation and software are subject to different production cycles, the description of settings and features may differ from actual settings and features. Information about discrepancies is provided in the Release Notes that accompany the product. Please read the Release Notes and take the information into account when installing, setting up, and using the product.

If you want to install technical and/or business system functions without using the consulting services provided by Software AG, you require extensive knowledge of the system to be installed, its intended purpose, the target systems, and their various dependencies. Due to the number of platforms and interdependent hardware and software configurations, we can describe only specific installations. It is not possible to document all settings and dependencies.

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- Access articles, code samples, demos, and tutorials.

- Find links to external websites that discuss open standards and web technology.

- Access product documentation, if you have **TECHcommunity** credentials. If you do not, you will need to register and specify **Documentation** as an area of interest.

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- To get information about fixes and to read early warnings, technical papers, and knowledge base articles, go to the Knowledge Center.

- Once you have an account, you can open Support Incidents online via the eService section of Empower.

- To submit feature/enhancement requests, get information about product availability, and download products, go to Products.

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