ARIS DESIGNER

QUICK START GUIDE

VERSION 10.0 - SERVICE RELEASE 18

MAY 2022

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.

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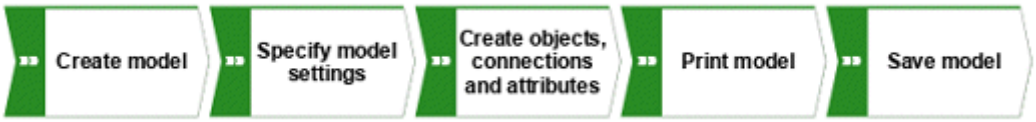
1 Before you start

This Quick Start Guide introduces you to the basic functions of ARIS 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 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 Designer, you can use the online help:

- If you need help on an open dialog, click the **Help** button of the dialog.
- If you require additional information, click **ARIS > Help** in the menu bar.
- If you need method help you can press the **Ctrl + F1** keys at many points in the program; the Method help opens. If, for example, you have opened a model of the **EPC** type and press **Ctrl + F1**, the **EPC** type will be explained. If you have selected an object while pressing the **Ctrl + F1** keys, the Method help for this object is opened instead.

The screen graphics in this manual may differ from your program interface, because different functions may be provided in ARIS Designer depending on your license.

2 Prerequisites

The following points are assumed.

- You were created as a user with an **ARIS Designer** license and with 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 Designer, that is, user name, password, and a link to the start page of ARIS Designer. This link should have been provided to you by your system administrator.

If in doubt, please contact your system administrator.

3 Start ARIS Designer

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

Procedure

1. Enter the link for the download client in the address bar of your browser. This link should have been provided to you by your system administrator.
2. Select **ARIS Architect/Designer** and click **Start**. A JAR archive is displayed, which can be directly opened or saved, depending on the browser you are using. If you have saved the JAR archive, you can start ARIS Designer directly by double-clicking this file in the future.
3. When the **Connection** wizard is opened, click **Finish**. The **Run ARIS** dialog opens.
4. Log in with the user ID provided to you.

ARIS Designer opens.

4 Create model and specify settings

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

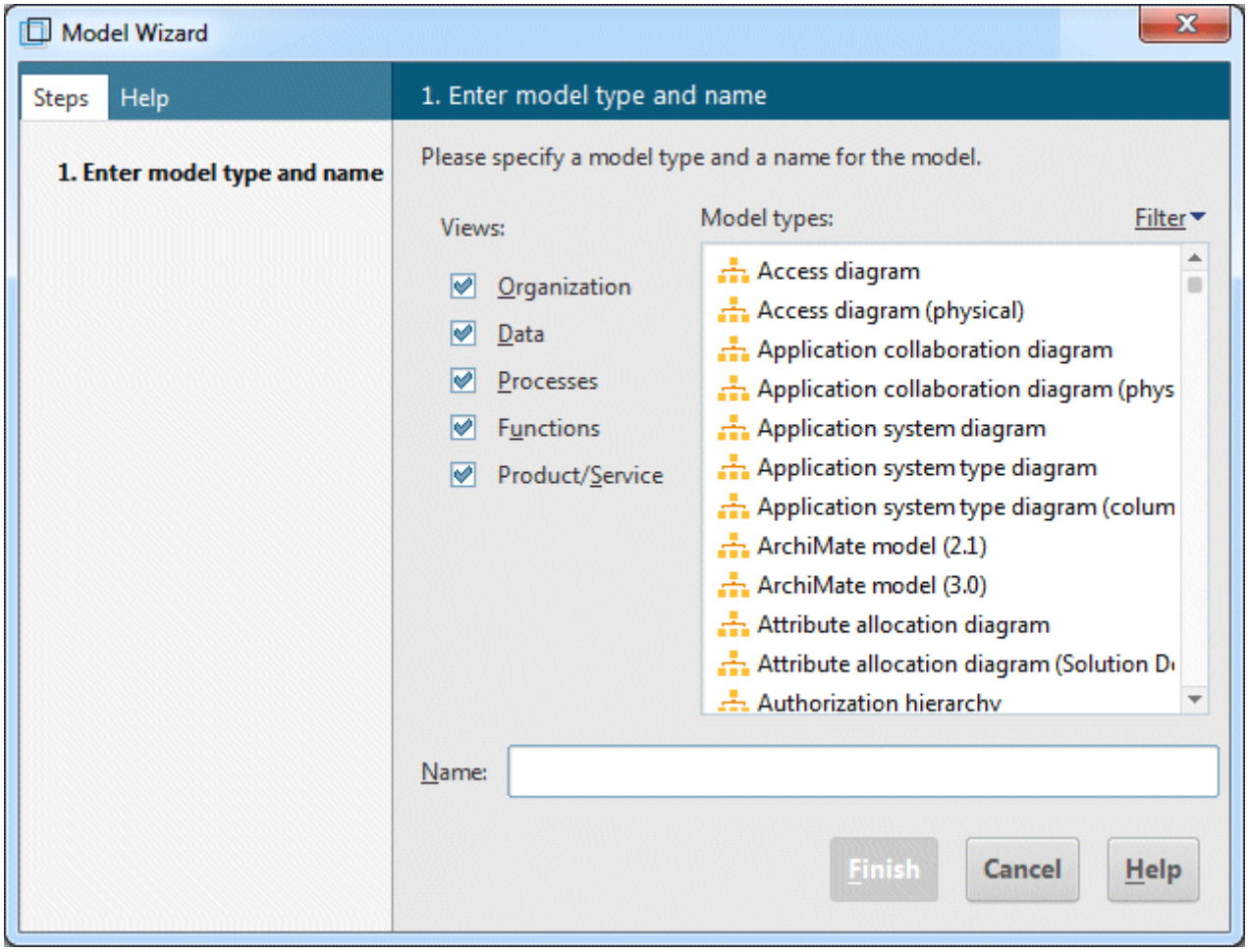
4.1 Create a model

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

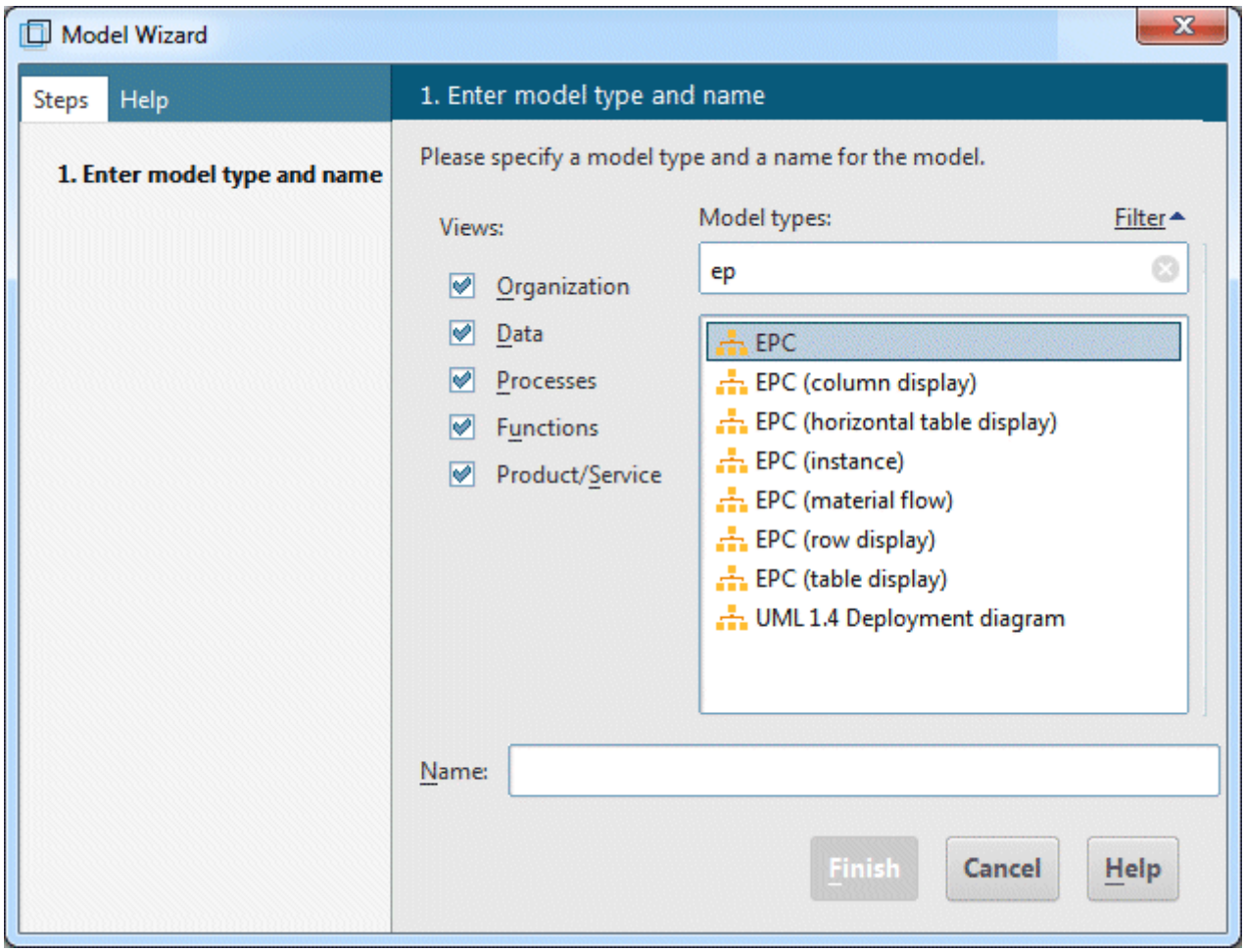
Procedure

1. Close the **New tab** tab by clicking on ✕ **Close**. The **Explorer** tab is activated.
2. Click the ▶ arrow in front of of the database. The **Login** Wizard opens.
3. Retain the **Entire method** filter and click **Finish**.
4. Click the ▶ arrow of the database in which you want to create the new model.
5. Right-click **Main group** and click **New >** **Model**.

   The **Model Wizard** opens.



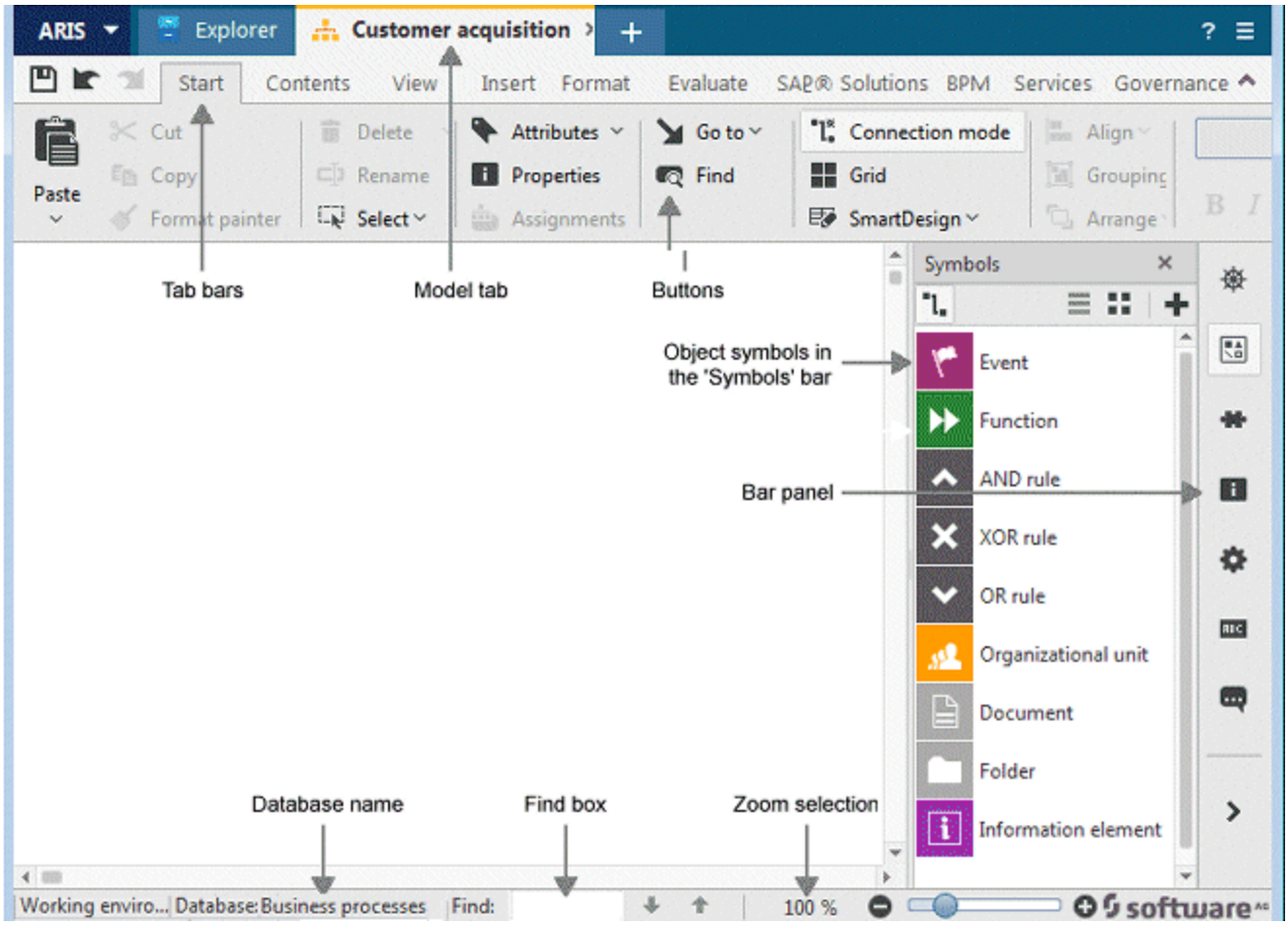
6. Enter **ep** in the **Model types** field to reduce the number of model types displayed.



7. Click **EPC** in the **Model types** field.
8. Enter the name **Customer acquisition** in the **Name** box.

9. Click **Finish**. The **Customer acquisition** model is generated and automatically opens in a new tab.

The modeling area, various toolbars and various buttons are now available for creating your model.



4.2 Hide grid

Normally, you do not need the grid if you use Guided Modeling and Smart Modeling. Therefore, switch off the grid.

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.

Procedure

Click **Grid**.

The grid is hidden.

4.3 Set up default distance

With Smart Modeling, objects are automatically placed in the specified default distance. In addition, 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. Click **ARIS > Options**.
2. On the **Selection** tab, click **Model > Layout**.
3. For **Minimum object spacing**, enter **20** for **Horizontally** and retain **10** for **Vertically**.
4. Click **OK**. The **Options** dialog is closed.

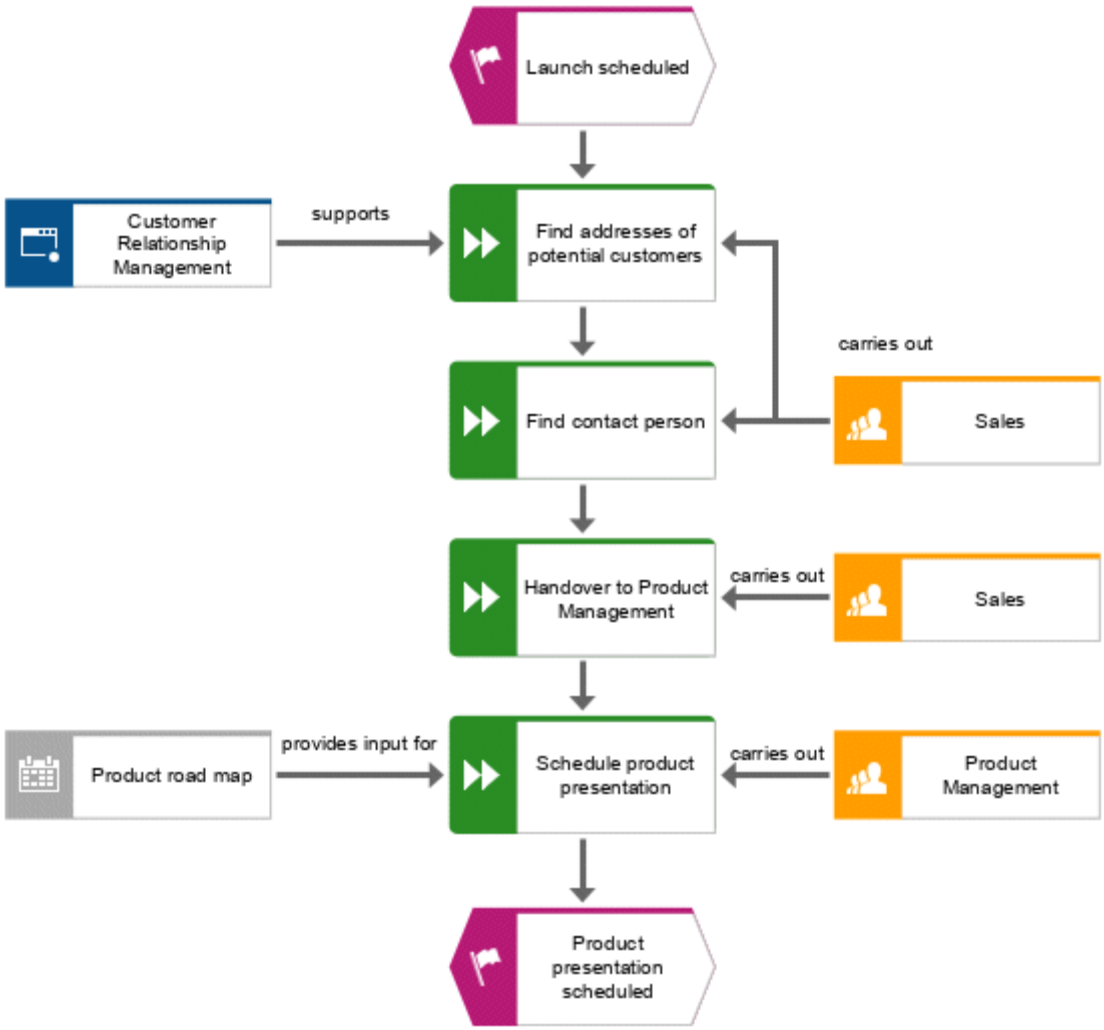
When you create a model with Smart Modeling, the objects are placed at the set distance.

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:



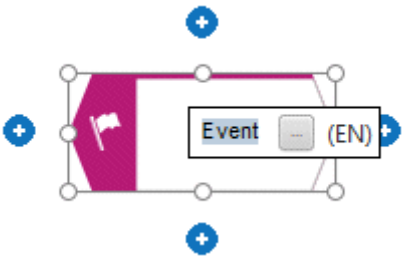
4.4.1 Create the basic control flow model

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

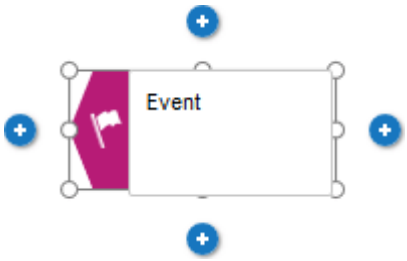
Procedure

1. Click the **Event** symbol in the **Symbols** bar.

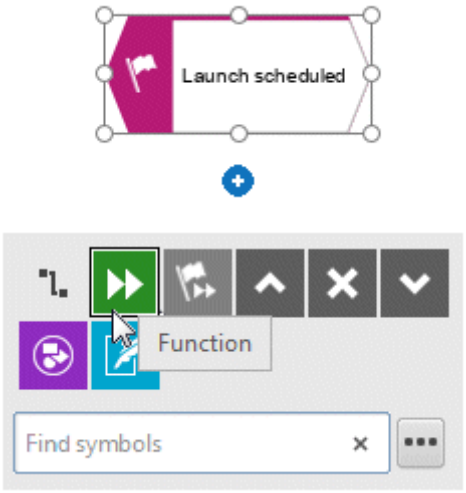
2. Move the mouse pointer to the position where you want to place the event and click again. The object is placed, and its name is selected for overwriting.



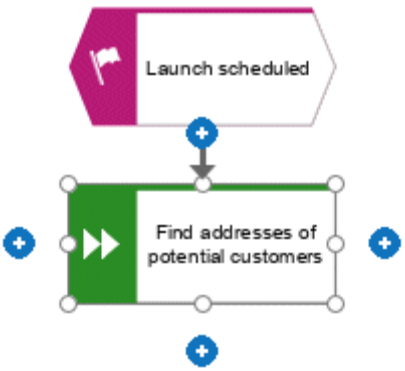
3. Enter a name for the event by overtyping the selection with **Launch scheduled** and press **Enter**.



4. Click **Insert at the bottom** under the **Launch scheduled** event.



5. Click **Function**. The function is placed in the default distance to the event and the name is selected for overwriting.
6. Since a function indicates that an activity must be performed, type **Find addresses of potential customers** and press **Enter**.



7. 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

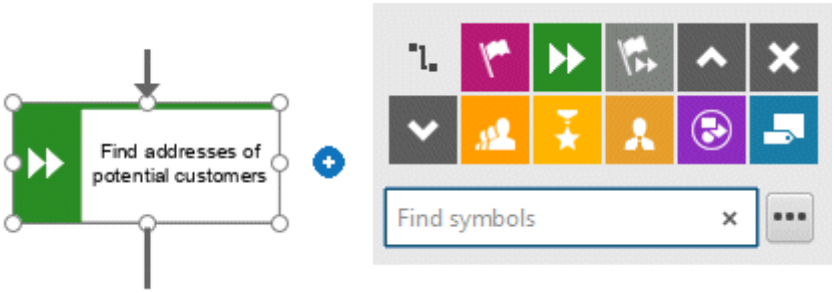
The basic control flow model, which includes the required work steps in the correct sequence, is completed.

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.

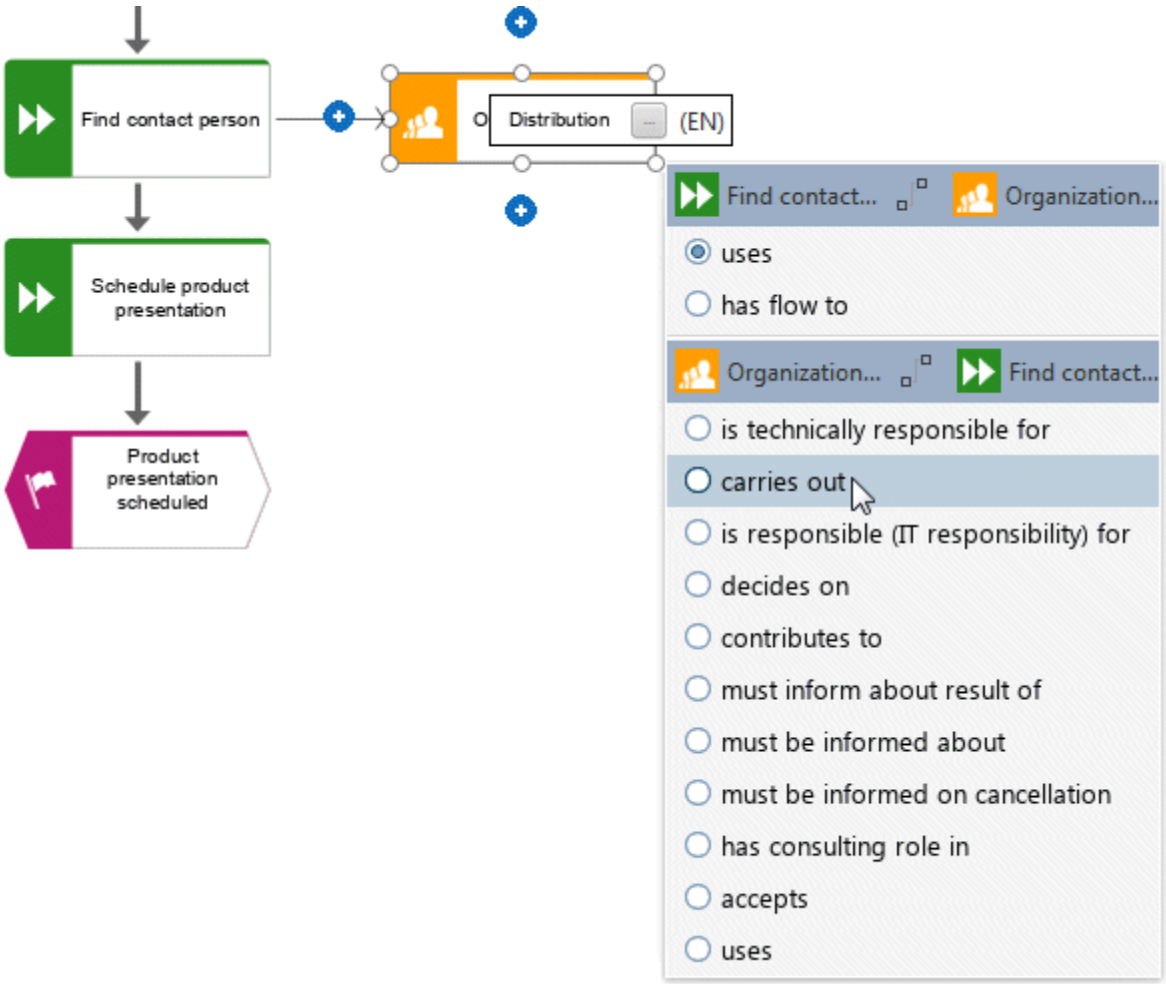
Procedure

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

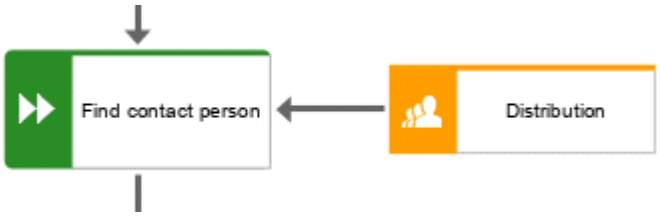


There are various connections available to connect the work step (function) and the organizational unit.

3. Enter the name **Distribution** and click **carries out**.



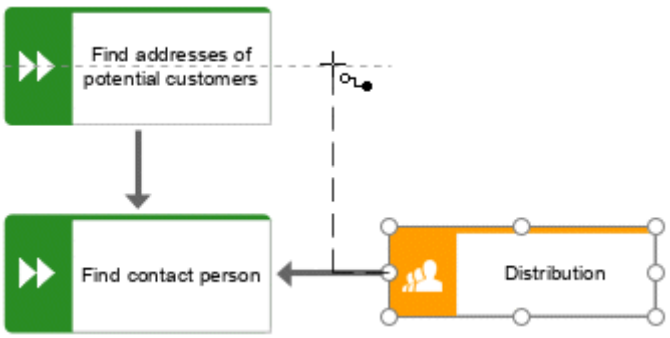
The organizational unit is placed.



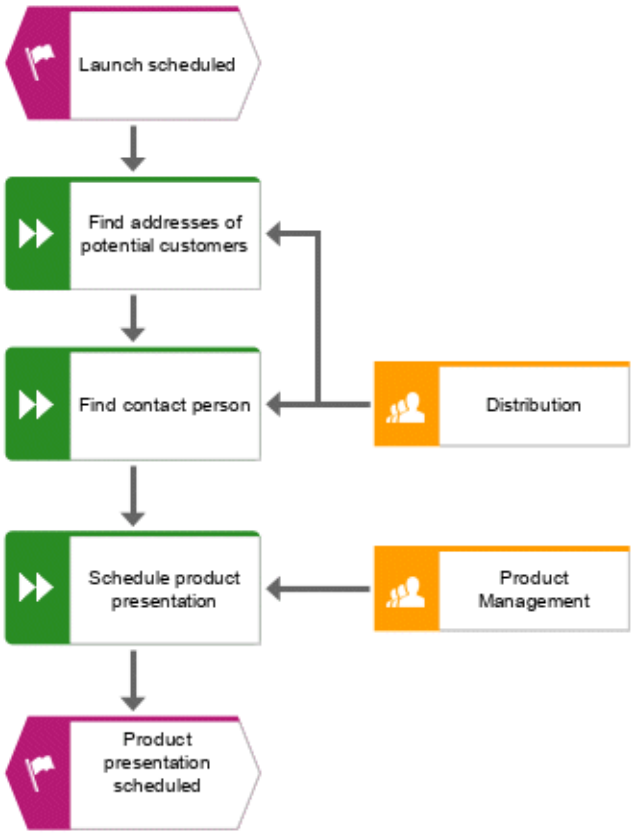
Not only the **Find contact person** work step, but also the **Find addresses of potential customers** work step is performed by the **Distribution** organizational unit. Therefore, connect **Distribution** with **Find addresses of potential customers**.

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 attach 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. Click in the modeling area to keep the connection.
9. 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.



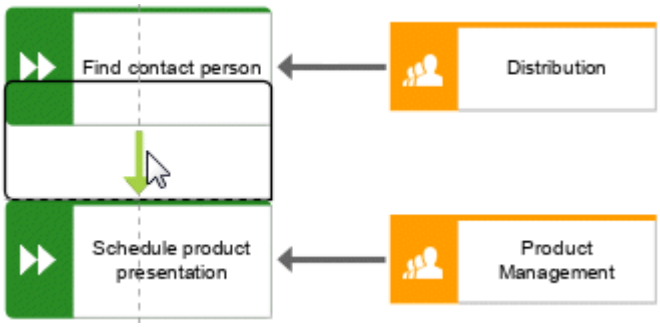
You have assigned the work steps to organizational units.

4.4.3 Insert a missing object

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.
2. Move the mouse pointer over the connection between the functions **Find contact person** and **Schedule product presentation**. The connection is colored green.



3. Click the connection. 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**.

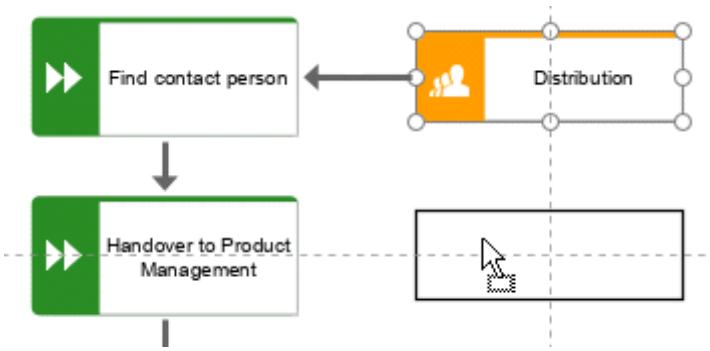
The missing object is inserted.

4.4.4 Create object occurrences

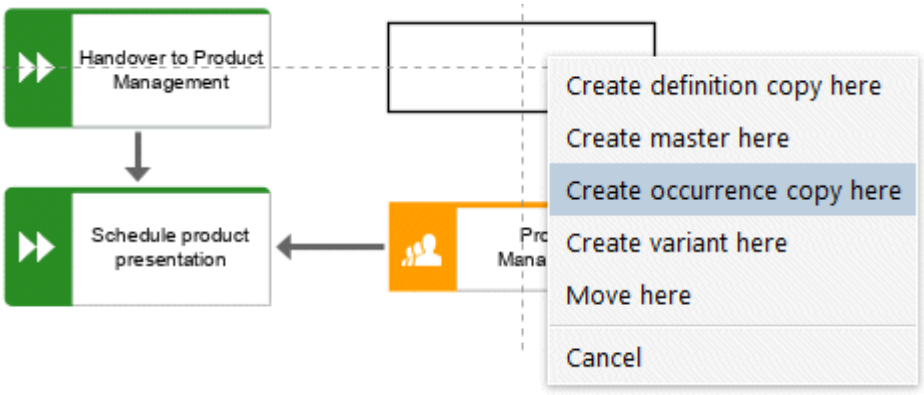
Of course, the **Distribution** organizational unit is also responsible for the **Handover to Product Management** step. To structure your model clearly, create an occurrence of the **Distribution** object beside the function **Handover to Product Management**. Object occurrences are copies of object 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. Right-click the **Distribution** object and hold down the mouse button.
2. 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. A preview frame of the object is displayed in the modeling area.

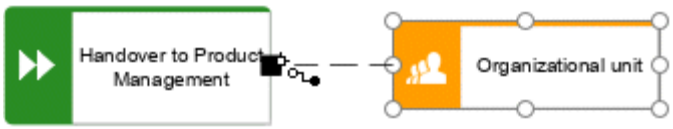


3. Release the mouse button and select **Create occurrence copy here**.



The **Distribution** occurrence copy is placed, selected, and the **Insert** icons are displayed.

4. Click **Insert to the left** and hold down the mouse button.
5. 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.
6. Click **carries out**.

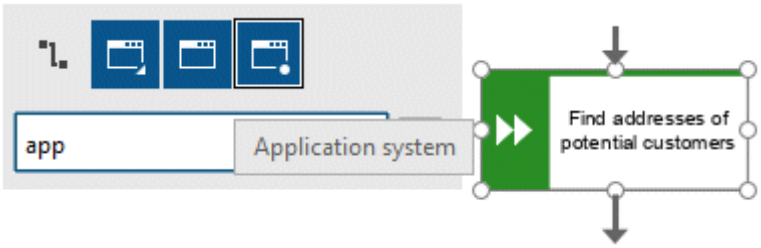
The occurrence copy is created and connected to the work step.

4.4.5 Assign supporting systems

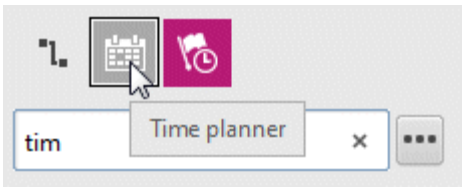
In this section, you assign the systems that support the work steps.

Procedure

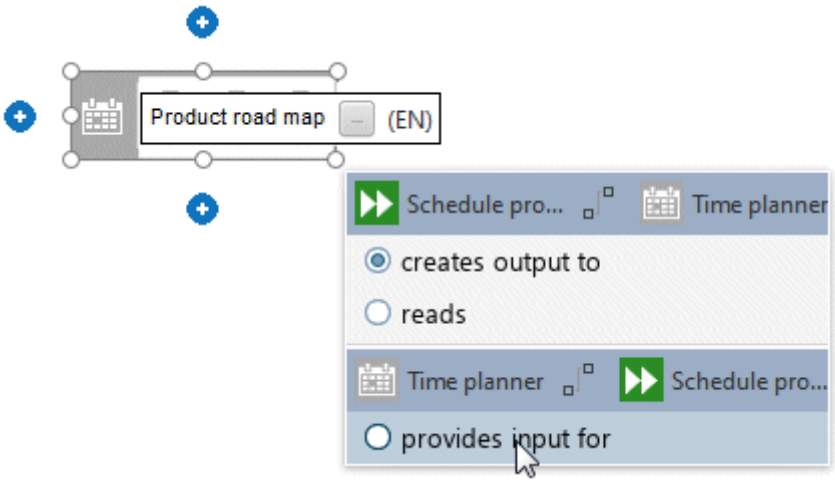
1. Click the **Find addresses of potential customers** function and then **Insert to the left**.
2. Because the application system is not listed in the **Smart Modeling** toolbar, enter **app** in the **Find symbols** box. The **Application** object symbols are displayed.



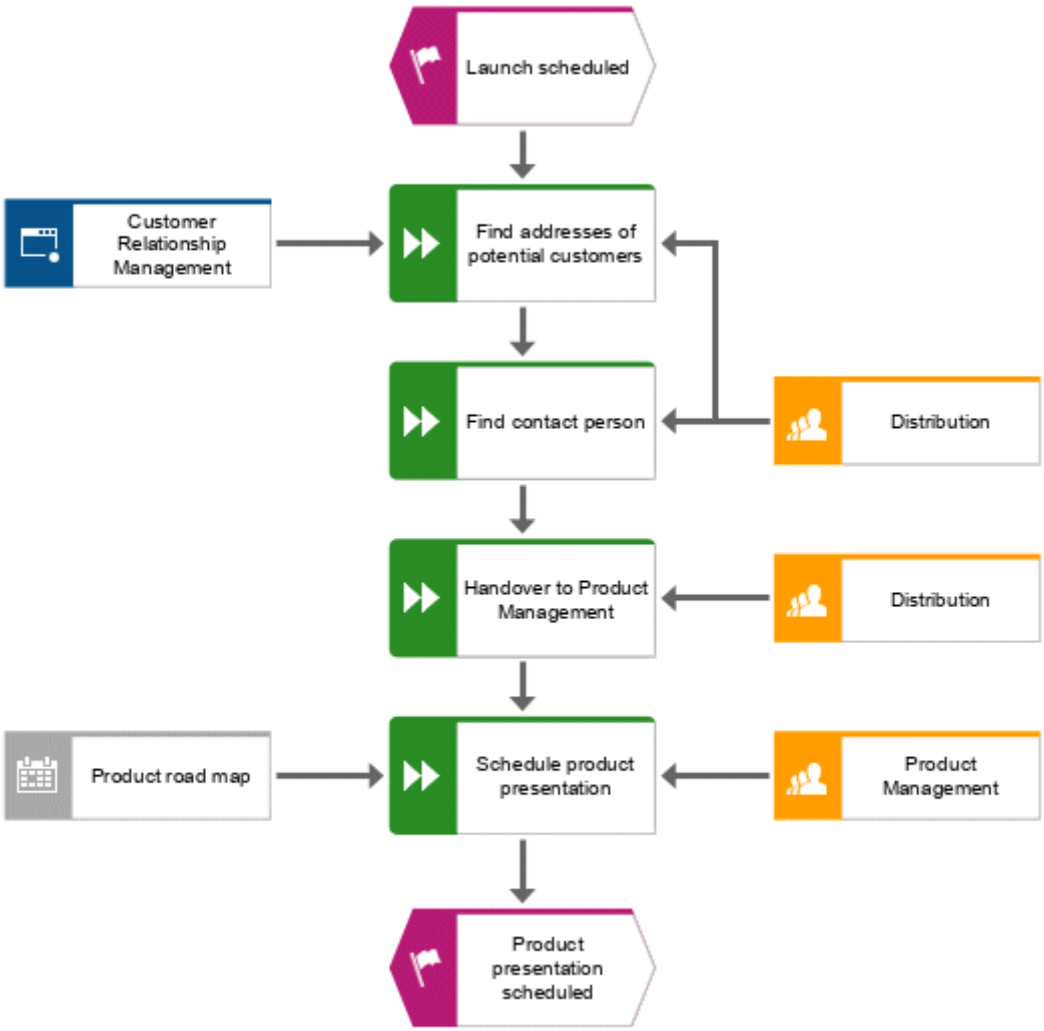
3. Click **Application system**. The application system is placed.
4. Enter the name **Customer Relationship Management**. The supporting system is placed.
5. Click the **Schedule product presentation** function and then **Insert to the left**.
6. Because the **Time planner** object is not listed in the **Smart Modeling** toolbar, enter **tim** in the **Find symbols** box. The **Time planner** object symbol is displayed.



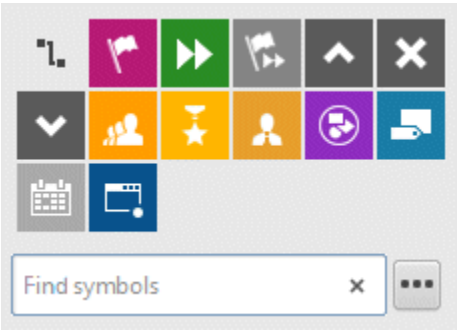
7. Click **Time planner**.
8. Enter the name **Product road map** and click the **provides input for** connection.



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**.



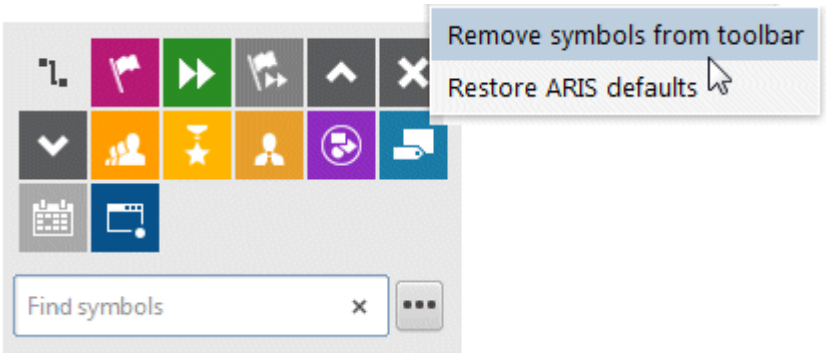
You can configure the **Smart Modeling** toolbar.

4.4.6 Configure Smart Modeling toolbar

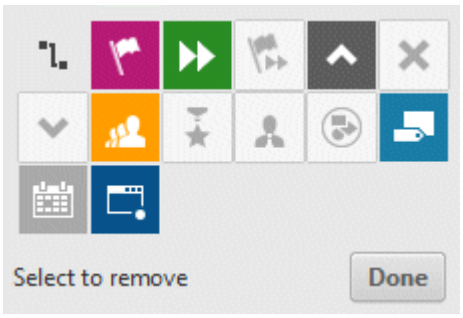
In this section, you customize the **Smart Modeling** toolbar to your needs. In the following procedure, you can click any **Insert** button of any function object, since you do not change the model but only the number of object symbols that the **Smart Modeling** toolbar provides for functions.

Procedure

1. Click a function and click any **Insert** button.
2. Click **Configure > Remove symbols from toolbar**.



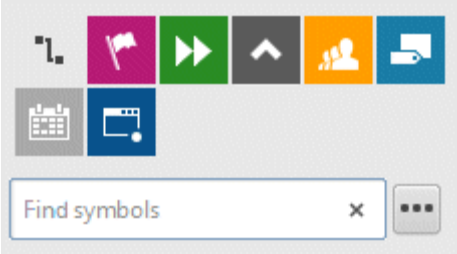
3. Click the object symbols you want to remove. They are grayed out.



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

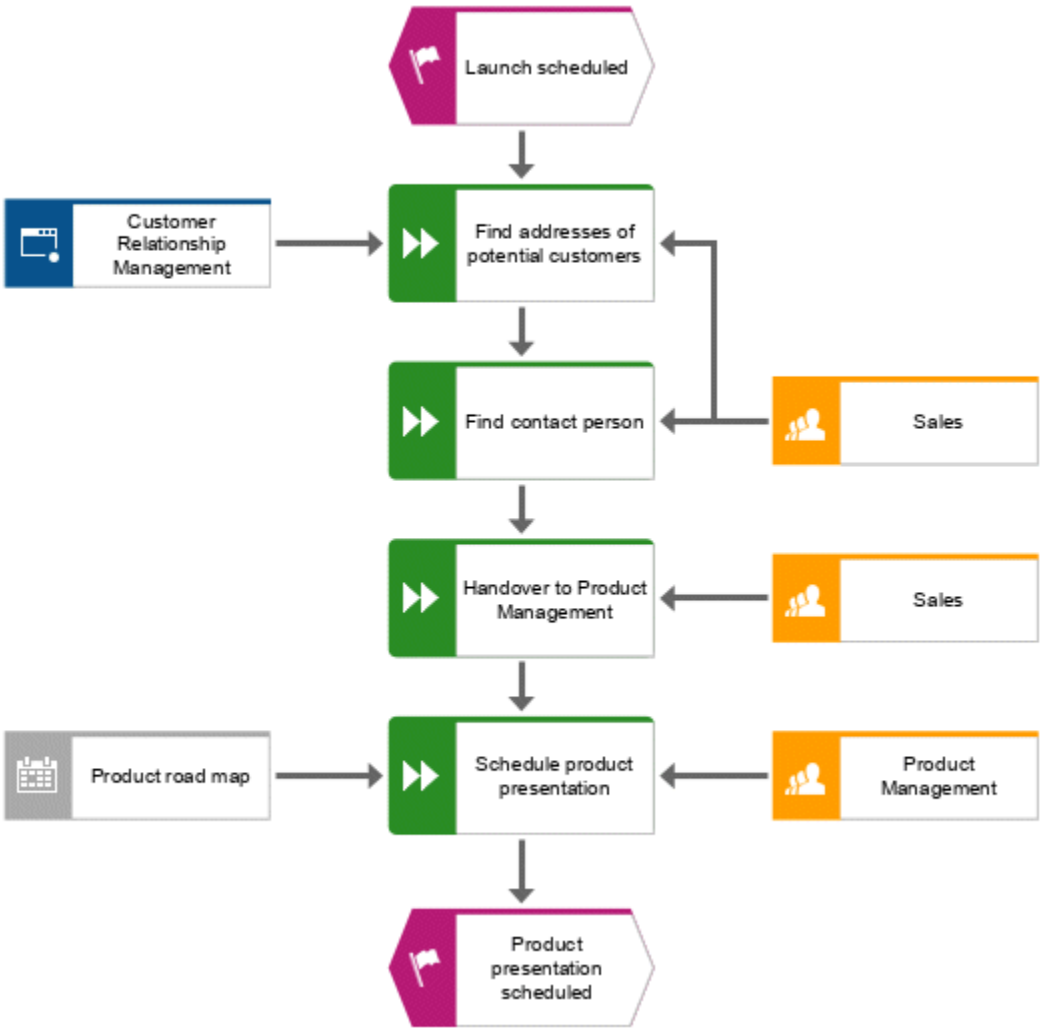
You can change object names directly in the model. If you change a name attribute, all occurrences of the object (page 17) in the database are renamed accordingly.

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.

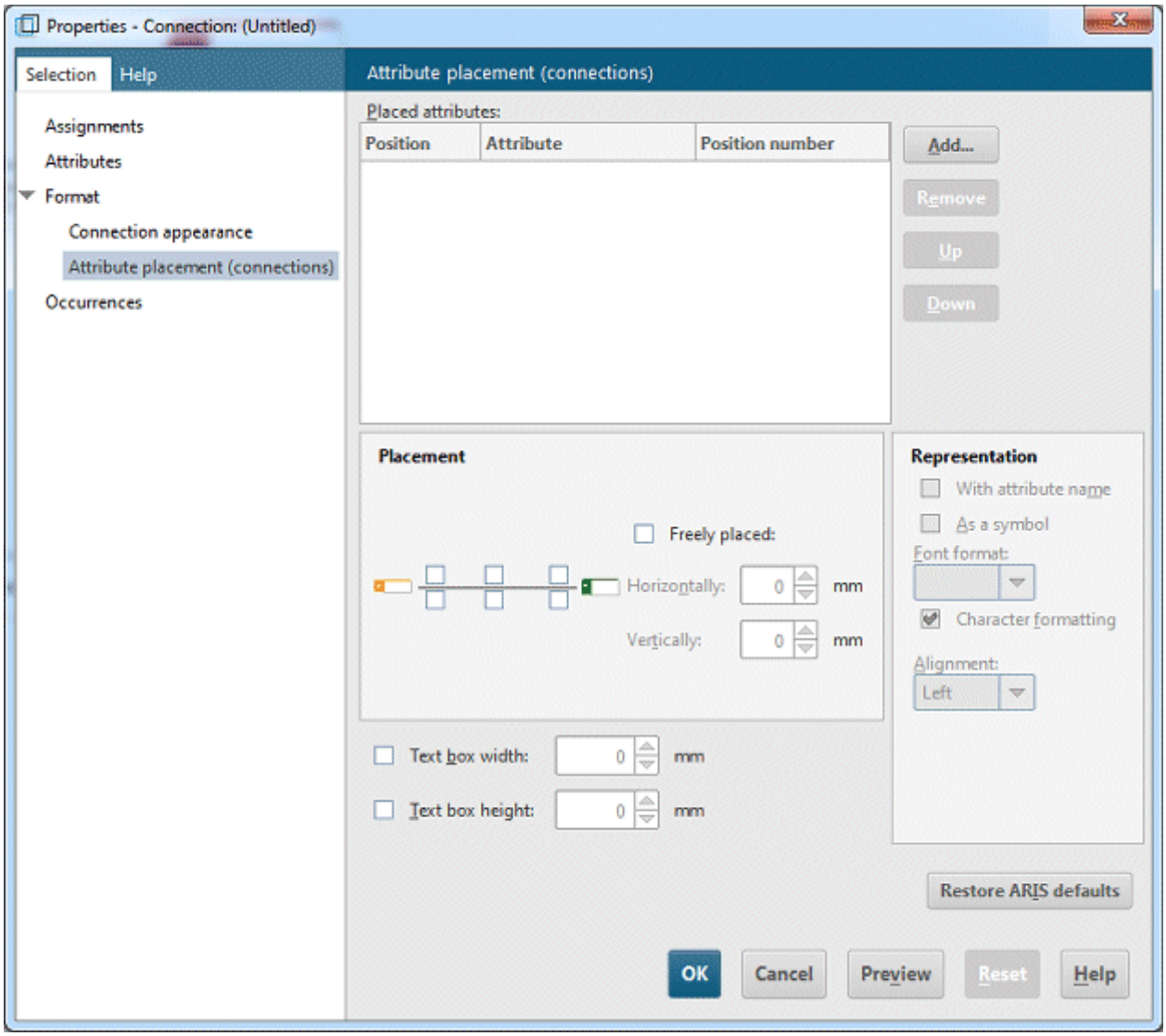


4.4.8 Place attributes

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

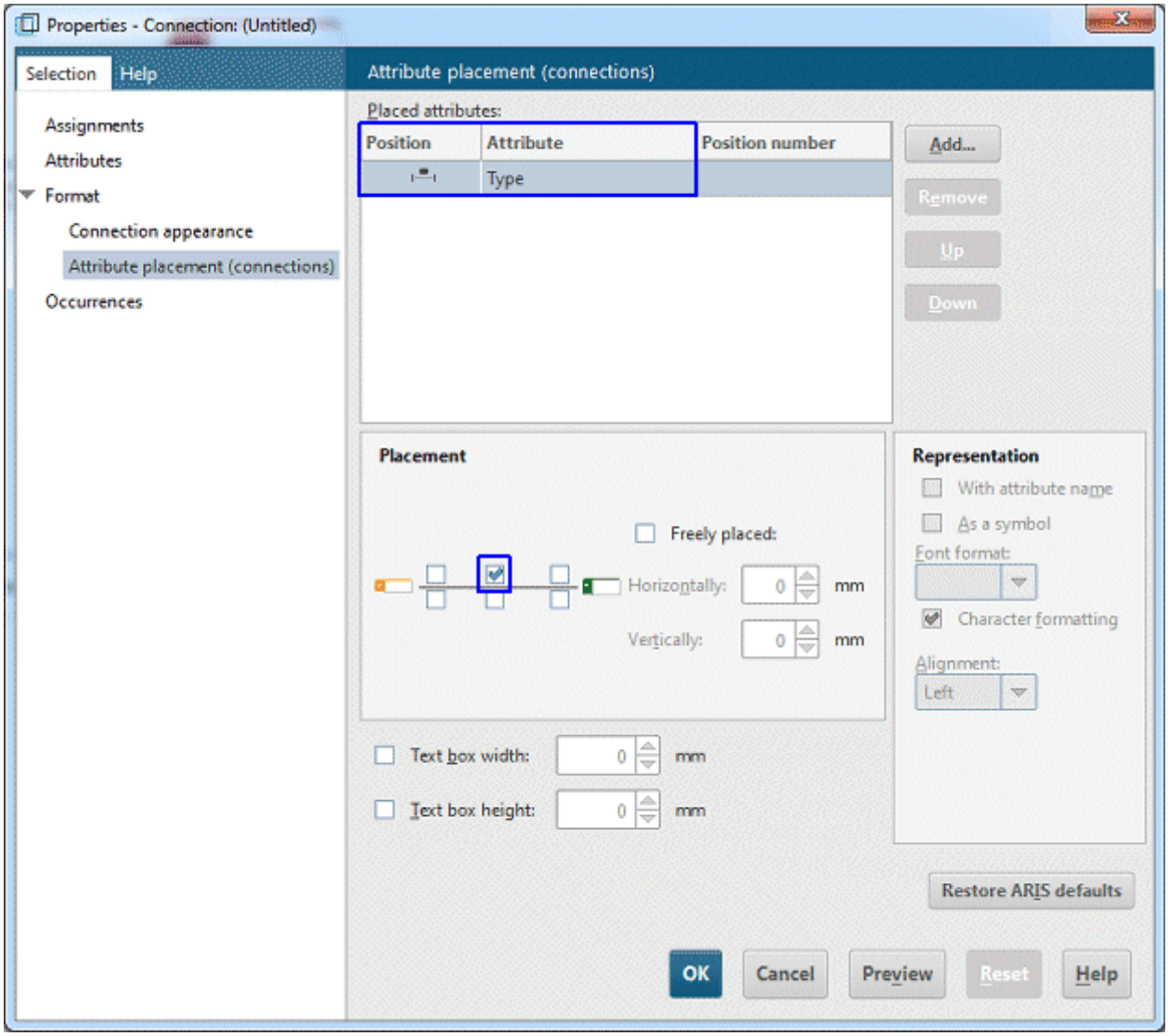
Procedure

1. Select the connection between the **Sales** and **Find addresses of potential customers**.
2. Click **Properties** in the **Start** tab bar. The **Properties** dialog opens.
3. On the **Selection** tab, click **Format > Attribute placement (connections)**.



4. Click **Add**. The **Add attributes** dialog opens.

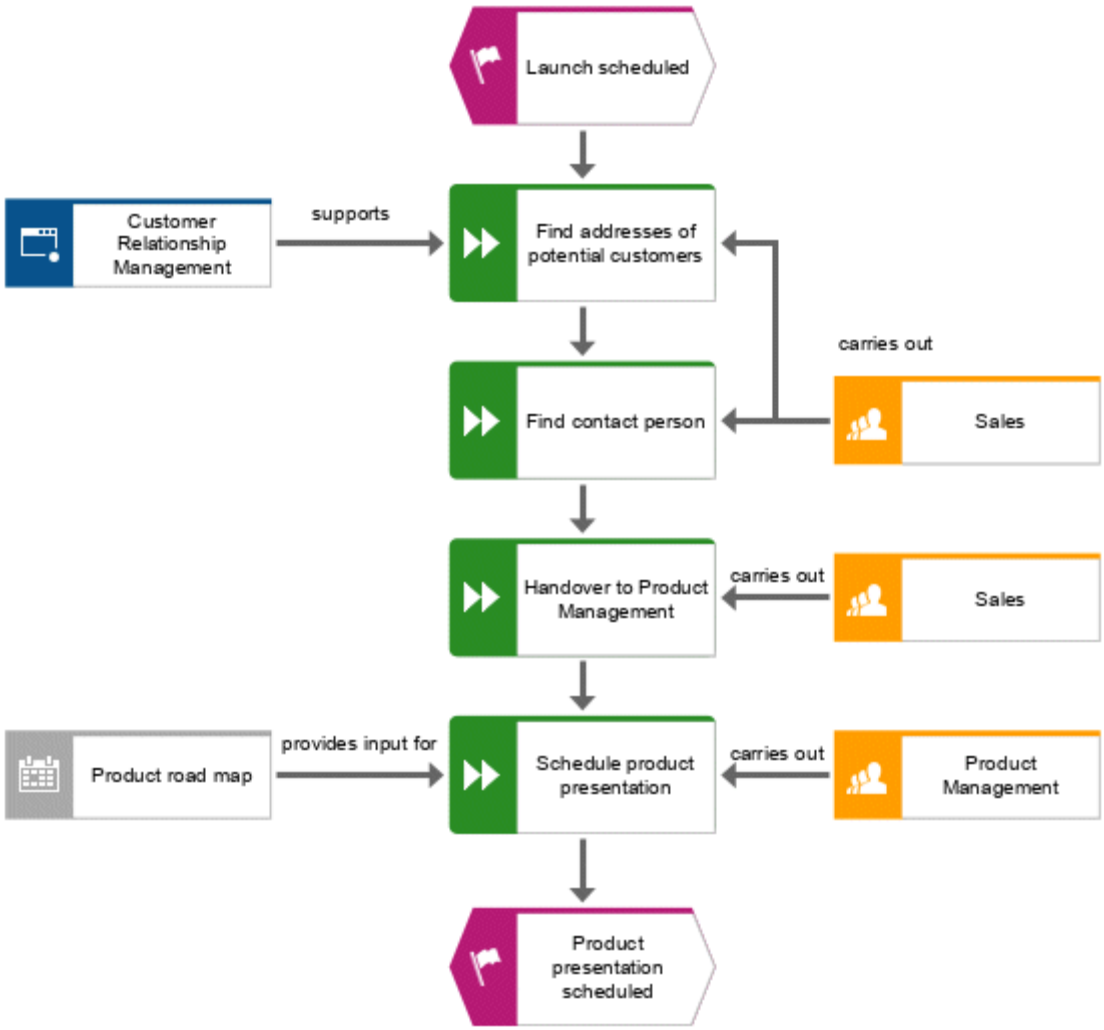
5. Enable the **Show specified attributes only** check box and double-click **Type**. The dialog closes. In the **Properties** dialog, **Type** is displayed and the default position is indicated.



6. Click **OK**. The dialog closes and the attribute is displayed in the model.
7. To enlarge the distance to the connection, drag the attribute to the right and release the mouse button.

8. 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**.
9. 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 model

To save your work, click **Save**.

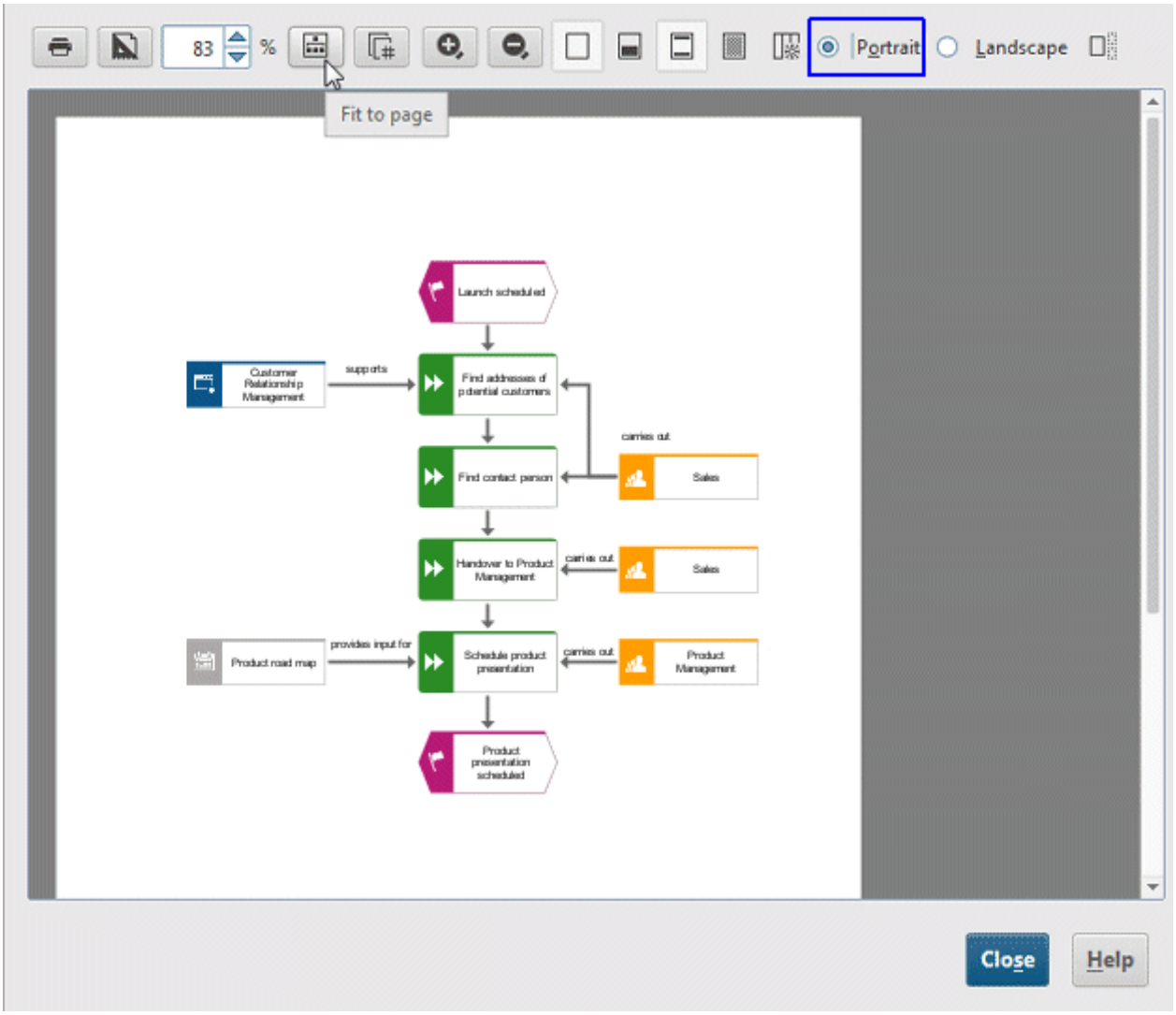
The model is saved.

5 Print model

You can print your model.

Procedure

1. Click **ARIS > Print > Print preview**. The **Print preview** dialog is opened.
2. Enable **Portrait** and **Fit to page**.



3. Click **Print**.
4. Select the printer and click **OK**.
5. Click **Close**.

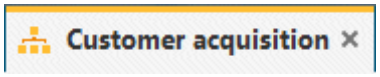
You have printed your model.

6 Close the model

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

Procedure

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

   If you have not yet saved the model, an information dialog opens.
2. Click **Yes** to save and close the model.

The model tab is closed.

7 Legal information

7.1 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.

When you combine various technologies, please observe the manufacturers' instructions, particularly announcements concerning releases on their Internet pages. We cannot guarantee proper functioning and installation of approved third-party systems and do not support them. Always follow the instructions provided in the installation manuals of the relevant manufacturers. If you experience difficulties, please contact the relevant manufacturer.

If you need help installing third-party systems, contact your local Software AG sales organization. Please note that this type of manufacturer-specific or customer-specific customization is not covered by the standard Software AG software maintenance agreement and can be performed only on special request and agreement.

7.2 Support

If you have any questions on specific installations that you cannot perform yourself, contact your local Software AG sales organization (https://www.softwareag.com/corporate/company/global/offices/default.html). To get detailed information and support, use our websites.

If you have a valid support contract, you can contact **Global Support ARIS** at: **+800 ARISHELP**. If this number is not supported by your telephone provider, please refer to our Global Support Contact Directory.

ARIS COMMUNITY

Find information, expert articles, issue resolution, videos, and communication with other ARIS users. If you do not yet have an account, register at ARIS Community**.**

PRODUCT DOCUMENTATION

You can find the product documentation on our documentation website.

In addition, you can also access the cloud product documentation. Navigate to the desired product and then, depending on your solution, go to **Developer Center**, **User Center** or **Documentation**.

PRODUCT TRAINING

You can find helpful product training material on our Learning Portal.

TECH COMMUNITY

You can collaborate with Software AG experts on our Tech Community website. From here you can, for example:

- Browse through our vast knowledge base.
- Ask questions and find answers in our discussion forums.
- Get the latest Software AG news and announcements.
- Explore our communities.
- Go to our public GitHub and Docker repositories and discover additional Software AG resources.

PRODUCT SUPPORT

Support for Software AG products is provided to licensed customers via our Empower Portal (https://empower.softwareag.com/). Many services on this portal require that you have an account. If you do not yet have one, you can request it. Once you have an account, you can, for example:

- Download products, updates and fixes.
- Add product feature requests.
- Search the Knowledge Center for technical information and tips.
- Subscribe to early warnings and critical alerts.
- Open and update support incidents.