

# Enterprise Architect Tutorial

## Tools and Techniques for BABOK® Guide v3

Version 1.0



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Author:

Sparx Systems



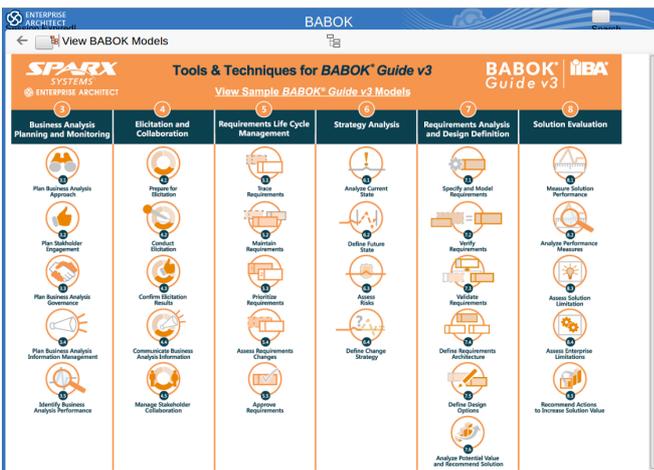
# Tools & Techniques for BABOK® Guide v3

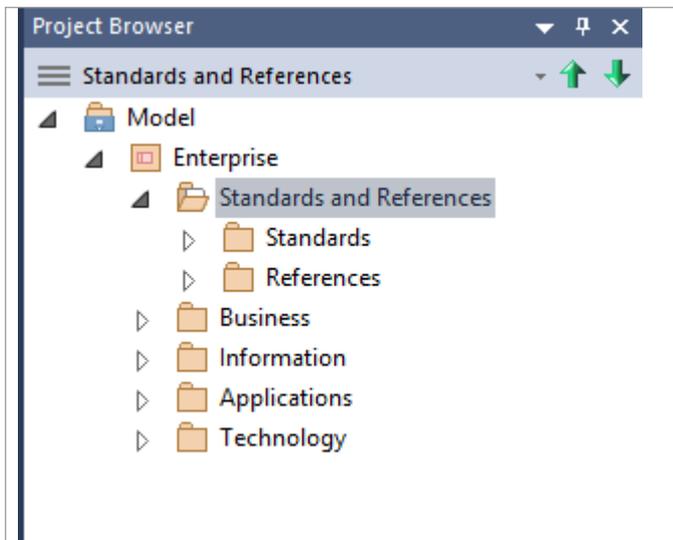
The *Tools & Techniques for BABOK® Guide v3* is a guide to the Business Analysis Body of Knowledge, published by the global body, the International Institute of Business Analysts™ (IIBA®). This body of knowledge has been incorporated into Enterprise Architect as an online resource, that you can use as an agile collaboration solution for business analysis. Using Enterprise Architect, you can keep a repository of documents, requirements and diagrams, as a comprehensive, tightly coupled tool for use in your business analysis.

Tools and Techniques for *BABOK Guide v3* was developed as a result of a strategic relationship between Sparx Systems and the International Institute of Business Analysis (IIBA). Tools and Techniques for *BABOK Guide v3* provides a convenient reference model that allows you to access example models and quick learn how to apply the best practice guidelines, as outlined in the body of knowledge.

The Tools and Techniques for *BABOK Guide v3* is an Enterprise Architect model, that is available to the world via mobile and web enabled devices via the Pro Cloud Server. This toolset will prepare Business Analysts to meet any challenge with instant access to a substantial and respected body of knowledge from the IIBA, in a convenient and familiar web-based format.

**Objective:** How to create a basic BABOK model using the *Tools & Techniques for BABOK® Guide v3* and Enterprise Architect's BABOK features.

View	Process
	<p><b>Accessing Tools &amp; Techniques for <i>BABOK Guide v3</i></b></p> <p>When starting with BABOK based modeling, an initial step is to reference the <i>BABOK Guide v3</i> and decide on the what aspects of Enterprise Architect you are wanting to use.</p> <p>View tutorial: <a href="#">Getting Started: A guide for the Business Analyst</a></p>
	<p><b>Create a Model using a Template</b></p> <p>Having viewed some examples that can be used in this process, you can now start to create your own model using the Model Wizard. This will create a simple model ready for you to add your own details.</p> <p>View tutorial: <a href="#">Create a Model using a Template</a></p>

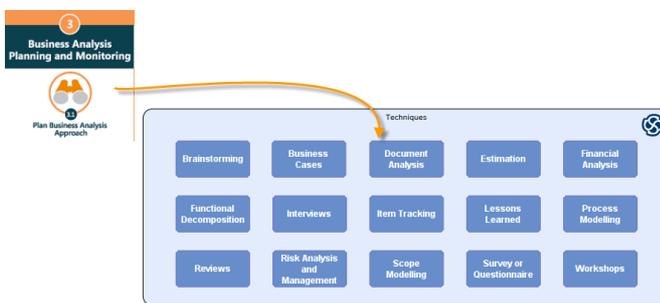


### Adding a Worked Example

Having created a general model outlay, you can now create starter models to cover specific BABOK Techniques.

This section covers adding a simple model template covering one BABOK Technique ready for you to add your own details.

View tutorial: [Adding a Worked Example](#)

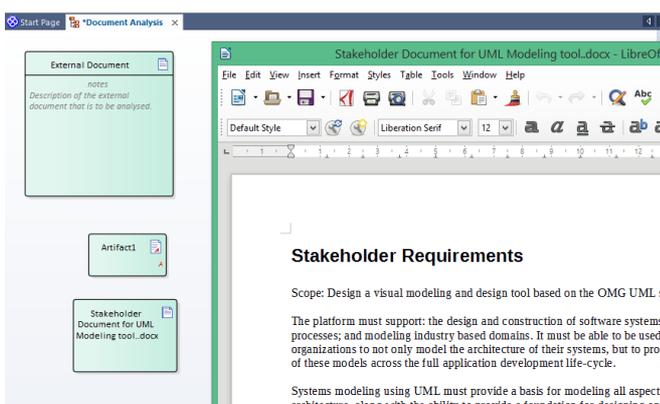


### Using Documents

When working with documents in Enterprise Architect you have numerous options, of which, we will cover the two most preferred options:

- Using internal Document Artifacts (uses Enterprise Architect's Editor)
- Using OLE accessible internally stored document (uses external editor like Word)

View tutorial: [Using Documents](#)

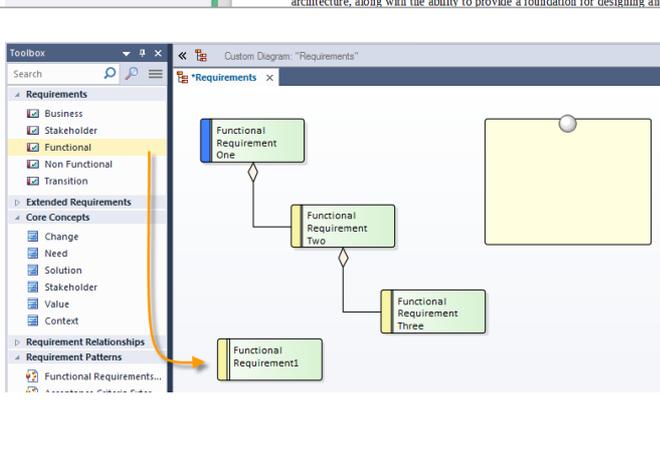


### Creating Your Own Diagrams

Enterprise Architect's *MDG Technology for BABOK Guide v3* includes a number of BABOK specific diagram types. These include some pre-defined **Patterns** for you to use as 'Stencils' when building your model.

This guide is for creating a BABOK requirements diagram and using a Pattern as a starter stencil for your requirement model.

View tutorial: [Creating Your Own Diagrams](#)





## Getting Started: A guide for the Business Analyst

Enterprise Architect is a powerful productivity tool that can help each and every Business Analyst to become more efficient and productive in their day to day role. This tutorial will demonstrate how to access and utilize the Tools and Techniques for *BABOK Guide v3*, teaching you how to implement best practice BA guidelines using suggested techniques, links to on-line help instructions and showcasing practical examples built in Enterprise Architect.

### Accessing Tools and Techniques for *BABOK Guide v3*

#### Prerequisites:

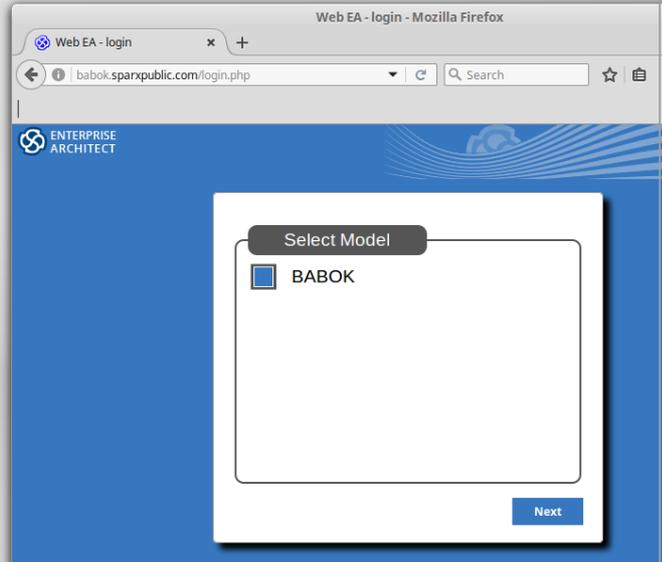
Need to have:

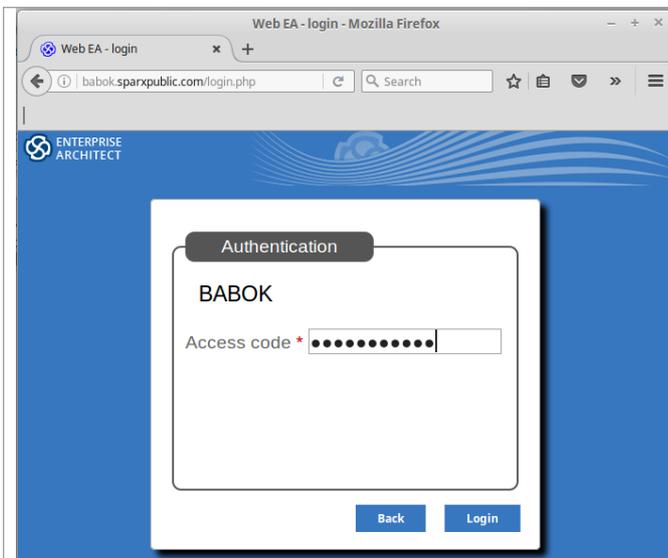
- 1) Installed the **MDG Technology for *BABOK Guide v3*** (not required if viewing the reference model only)
- 2) Web access to the ***BABOK Guide v3***
- 3) Web access to download the BABOK structure.

When starting with BABOK based modeling, an initial step is to reference the ***BABOK Guide v3*** and decide on the what aspects of Enterprise Architect you are wanting to use.

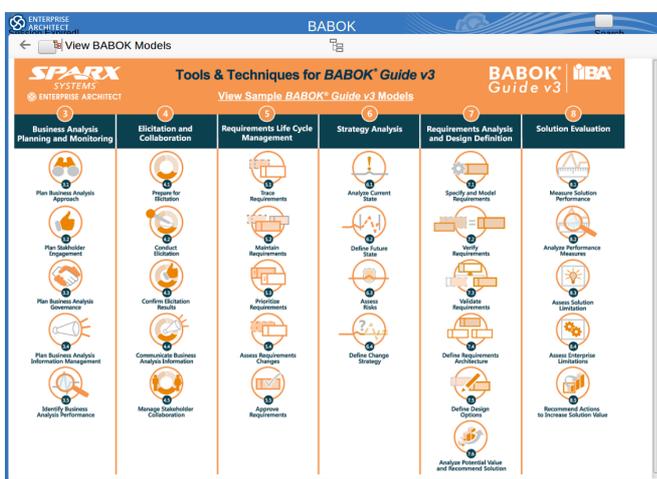
You can then run the Model Wizards to load these into your Enterprise Architect model ready to start you model-based analysis process.

### Open the Tools & Techniques for *BABOK Guide v3* on the Cloud

View	Process
	<p>In a web browser, go to the following URL:  <b><a href="http://babok.sparxpublic.com/login.php">http://babok.sparxpublic.com/login.php</a></b>            Select the BABOK model option.</p>
	<p>When prompted for an Access code, enter:  <b>babok.model</b></p>

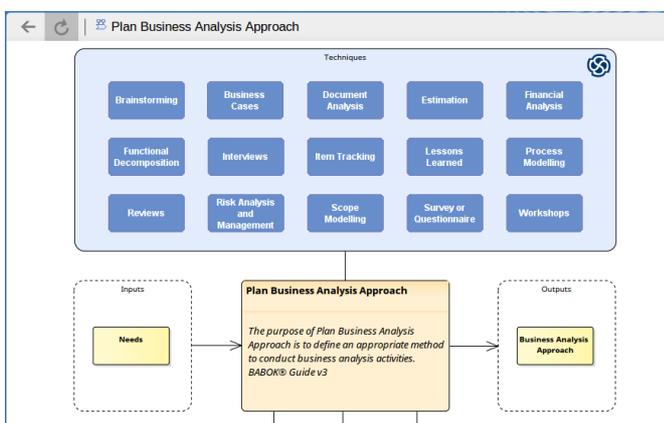


This will open the Tools & Techniques for *BABOK Guide v3*:



Those of you familiar with the BABOK Guide v3 will recognize the knowledge areas. Each column corresponds to a Knowledge Area in the BABOK Guide; while each cell corresponds to a different Task. **The Tools & Techniques for BABOK Guide v3** provides an initial outlay of the BABOK tools covering sections 3 to 8 from the guide. You can run through these options and decide on which a process you want to model.

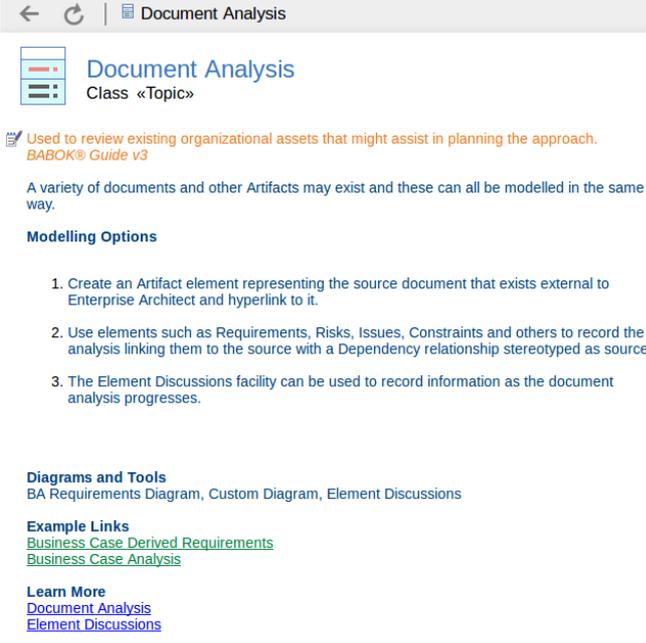
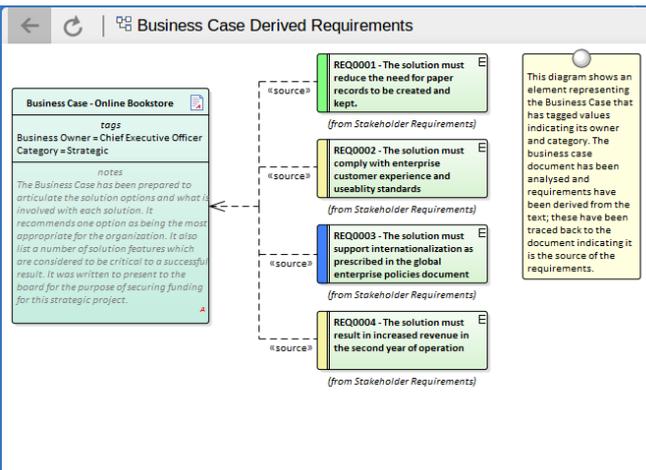
For a starter let's select the initial process:



You can review each task and decide which techniques are appropriate for your specific project. For this particular example, I have selected that Task entitled “3.1 Plan Business Analysis Approach”.

Click on the BABOK option:  
**3.1 Plan Business Analysis Approach**

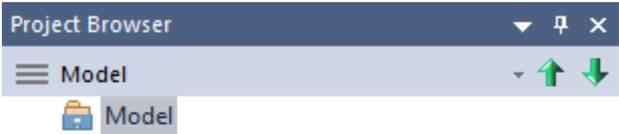
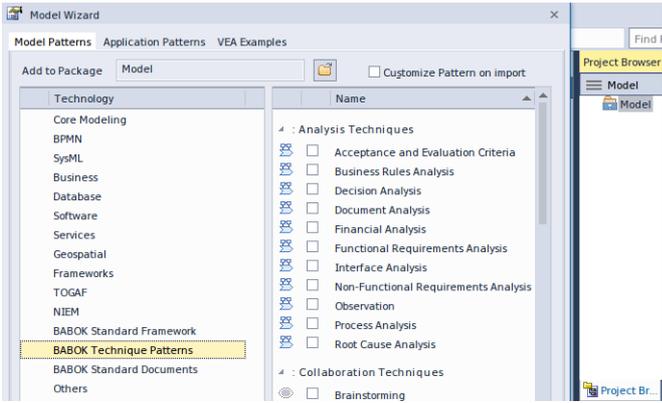
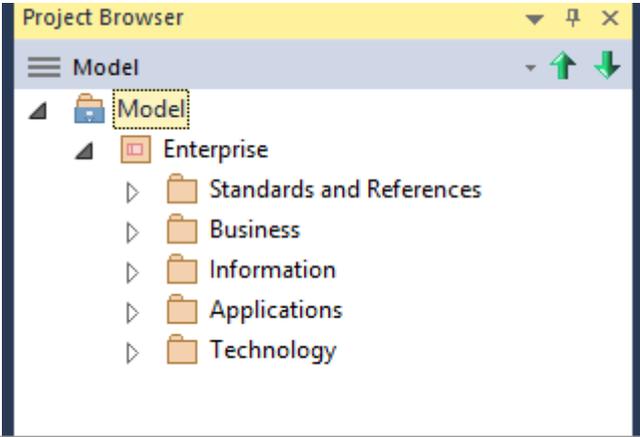
This opens the diagram covering the **Techniques, in blue**, used in the process:  
**Plan Business Analysis Approach**

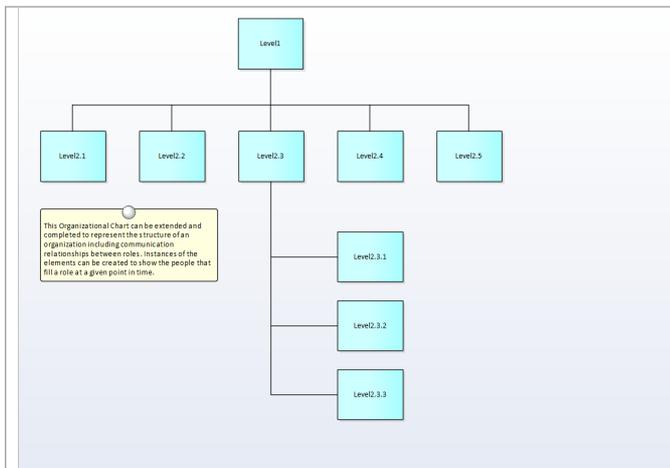
 <p>Document Analysis Class «Topic»</p> <p>Used to review existing organizational assets that might assist in planning the approach. BABOK® Guide v3</p> <p>A variety of documents and other Artifacts may exist and these can all be modelled in the same way.</p> <p><b>Modelling Options</b></p> <ol style="list-style-type: none"> <li>1. Create an Artifact element representing the source document that exists external to Enterprise Architect and hyperlink to it.</li> <li>2. Use elements such as Requirements, Risks, Issues, Constraints and others to record the analysis linking them to the source with a Dependency relationship stereotyped as source.</li> <li>3. The Element Discussions facility can be used to record information as the document analysis progresses.</li> </ol> <p><b>Diagrams and Tools</b> BA Requirements Diagram, Custom Diagram, Element Discussions</p> <p><b>Example Links</b> <a href="#">Business Case Derived Requirements</a> <a href="#">Business Case Analysis</a></p> <p><b>Learn More</b> <a href="#">Document Analysis</a> <a href="#">Element Discussions</a></p>	<p>In the <b>Technique</b> area double-click on:</p> <p><b>Document Analysis</b></p> <p>This will display the details on the <b>Document Analysis</b> technique.</p> <p>This includes two areas:</p> <ul style="list-style-type: none"> <li>• <b>Modeling Options</b></li> <li>• <b>Example Links</b></li> </ul>
<p><b>Modelling Options</b></p> <ol style="list-style-type: none"> <li>1. Create an Artifact element representing the source document that exists external to Enterprise Architect and hyperlink to it.</li> <li>2. Use elements such as Requirements, Risks, Issues, Constraints and others to record the analysis linking them to the source with a Dependency relationship stereotyped as source.</li> <li>3. The Element Discussions facility can be used to record information as the document analysis progresses.</li> </ol>	<p><b>View the Modeling Options:</b></p> <p>Under the <b>Modeling Options</b> is a general explanation of the Enterprise Architect features to use.</p> <p>In this case it is covering importing a Document and creating relevant model elements from this.</p>
 <p>Business Case - Online Bookstore</p> <p>tags Business Owner = Chief Executive Officer Category = Strategic</p> <p>notes The Business Case has been prepared to articulate the solution options and what is involved with each solution. It recommends one option as being the most appropriate for the organization. It also list a number of solution features which are considered to be critical to a successful result. It was written to present to the board for the purpose of securing funding for this strategic project.</p> <p>REQ0001 - The solution must reduce the need for paper records to be created and kept. (from Stakeholder Requirements)</p> <p>REQ0002 - The solution must comply with enterprise customer experience and usability standards. (from Stakeholder Requirements)</p> <p>REQ0003 - The solution must support internationalization as prescribed in the global enterprise policies document. (from Stakeholder Requirements)</p> <p>REQ0004 - The solution must result in increased revenue in the second year of operation. (from Stakeholder Requirements)</p> <p>This diagram shows an element representing the Business Case that has tagged values indicating its owner and category. The business case document has been analysed and requirements have been derived from the text; these have been traced back to the document indicating it is the source of the requirements.</p>	<p><b>View the Example Links:</b></p> <p>This provides links to completed examples that you can use in the Document Analysis.</p>

## Create a Model using a Template

Tools and Techniques for *BABOK Guide v3* provides hundreds of examples and best practice guidelines for Business Analysts to read and understand. Please review the website and find the techniques that you find applicable to your development project. You can create your own model using the convenient Model Wizard and the MDG Technology for BABOK. This model can be tailored and adapted to suit your individual needs, helping you to save time and get started sooner.

This tutorial will show you how to create your own model using a simple template.

View	Process
	<p>Select a package in the <b>Project Browser</b>.</p>
	<p>Open the <b>Model Wizard</b> dialog by pressing <b>Ctrl+Shift+M</b>.</p> <p>Under <b>Technology</b> select: <b>BABOK Standard Framework</b></p> <p>From the <b>Name</b> column select: <b>Enterprise</b>.</p> <p>Click on <b>OK</b>.</p>
	<p>This will start the download process and create a set of packages under the currently selected package.</p> <p>In the <b>Project Browser</b> you now have a skeletal model ready for your to use as a basic starting block for creating your own model.</p> <p>In the next steps you will view some key diagrams provided.</p>

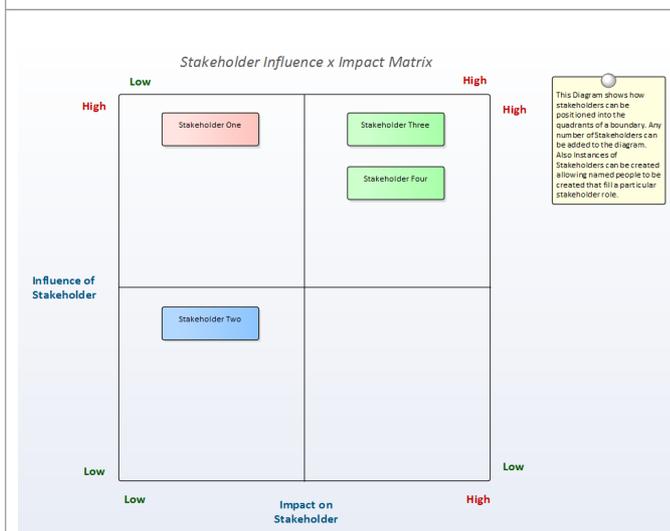


From the **Project Browser** select the diagram:

- **Model.Enterprise.Business.Organisation.Org  
anization Chart**

This provides a simpler starting point for creating a Organization Chart of the organization you are analyzing.

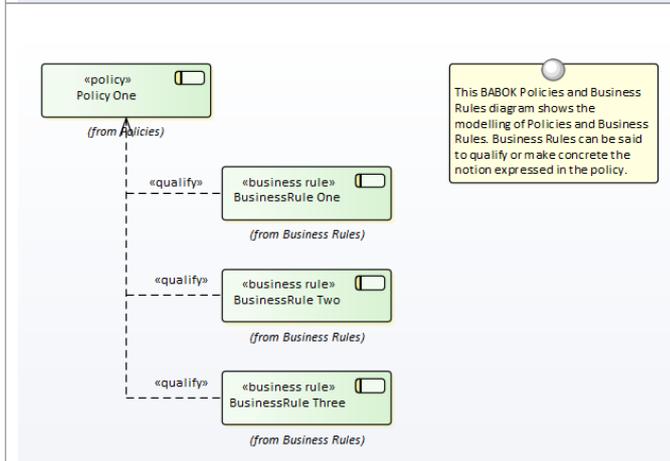
Select any element on the diagram and press **Alt + Enter** to access the properties. This will allow you to modify the element to reflect your own organizational structures. This basic template provides a simple starting point for creating your own Organization Chart. Refer to Tools and Techniques for step by step instructions on how to proceed.



From the **Project Browser** select the diagram:

- **Model.Enterprise.Business.Stakeholders.Stak  
holder Matrix.Stakeholder Matrix**

This provides a grid chart defining the stakeholders of the organization you are analyzing.



From the **Project Browser** select the diagram:

- **Model.Enterprise.Business.Policies and  
Business Rules.Business Rules Analysis**

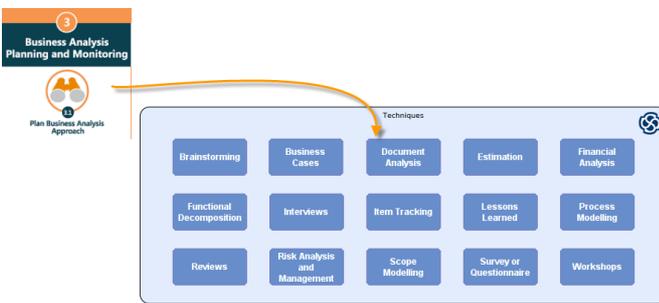
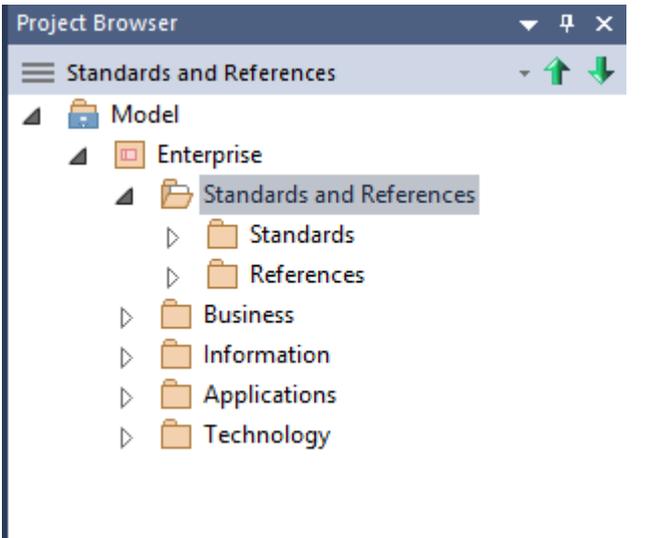
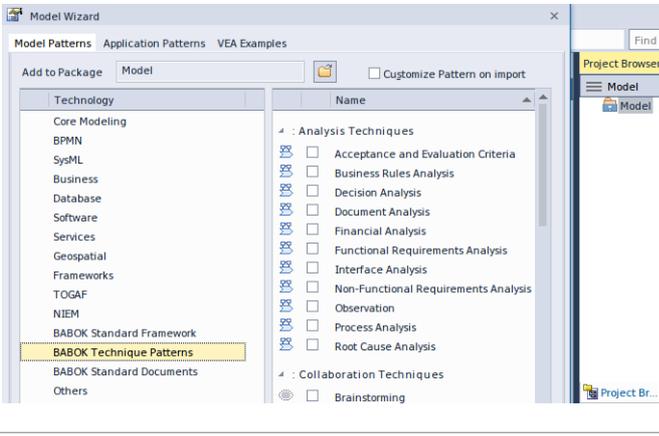
This provides a diagram laying out existing Business Rules and their relationship to Policies.

# Adding a Worked Example

Having created a general model outlay, you can now create starter models to cover specific BABOK Techniques. To do this:

- First select a BABOK Technique
- Then use Enterprise Architect's Model Wizard to generate a basic template for this Technique.

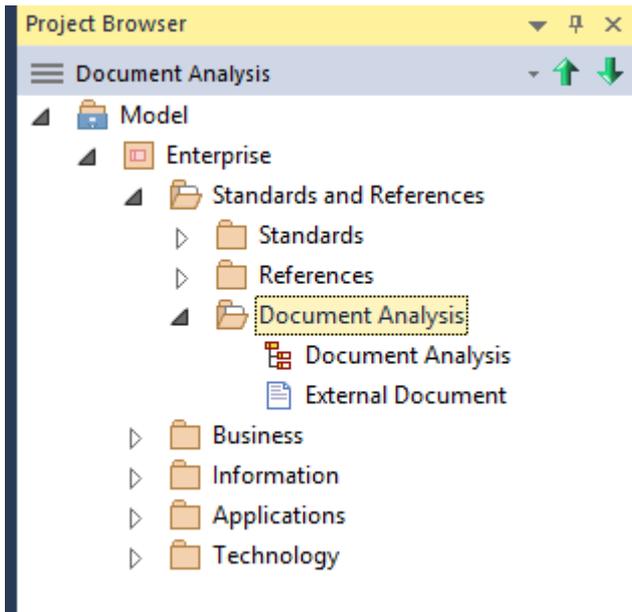
In this section you will add a simple model template covering one BABOK Technique. You will add this to the structure you created above, ready for you to add your own details.

View	Process
	<p>In this exercise you create a model covering the <b>BABOK 3.1 - Plan Business Analysis</b>. The <b>BABOK Technique</b> you want to implement is the <b>Document Analysis</b> technique.</p>
	<p>In the <b>Project Browser</b>, select the package: - <b>Model.Enterprise.Standards and References</b></p>
	<p>Open the <b>Model Wizard</b> dialog by pressing <b>Ctrl+Shift+M</b>.</p> <p>Under <b>Technology</b> select:</p> <p><b>BABOK Technique Pattern</b></p> <p>From the group <b>Analysis Techniques</b>, under the</p>

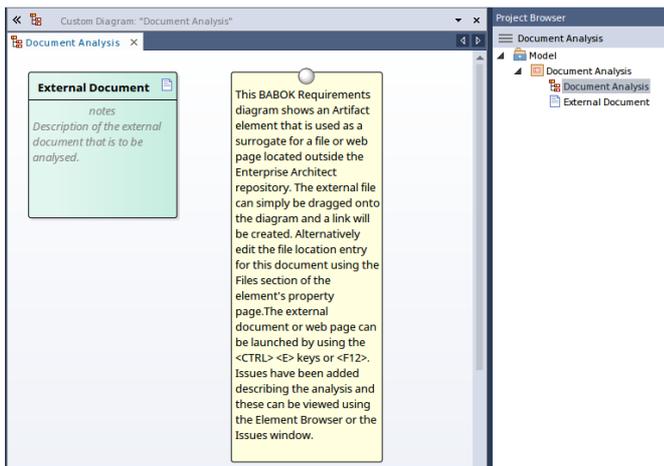
Name column, select:

**Document Analysis.**

Click on **OK**.



This will start the download process and create a package under the currently selected package.



Select the **Document Analysis** diagram from the model.

Open the diagram.

The diagram gives reference to using a document.

As there are a number of methods you can use to import or connect to a external document, we will cover several popular options below.

## Using Documents

When working with documents in Enterprise Architect you have numerous options, of which we will cover the two most preferred options:

- Using internal Document Artifacts (uses EA's Editor)
- Using OLE accessible internally stored document (uses external editor like Word).

The benefit of the internal Document Artifact is that you can create new Elements that are hyperlinked to text of your document.

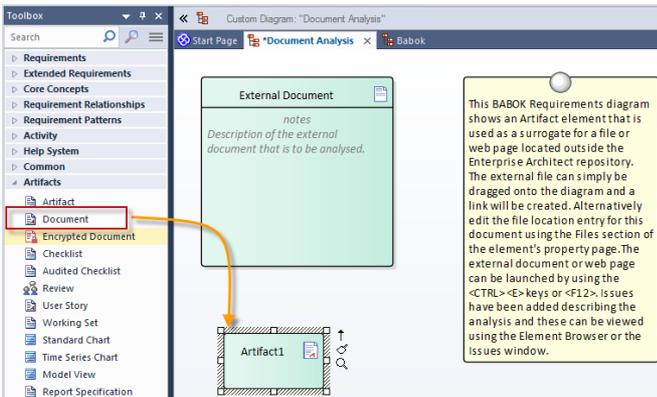
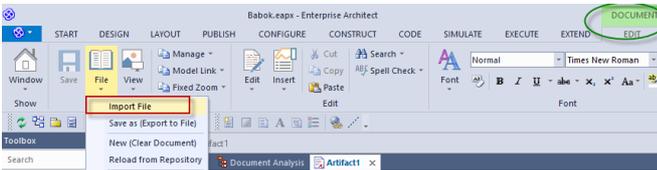
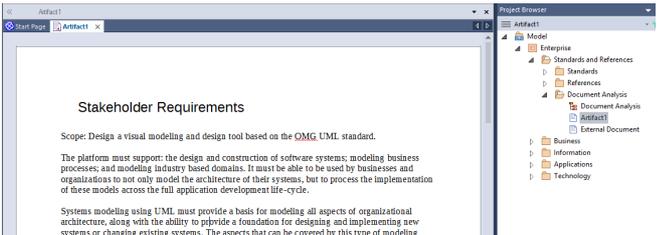
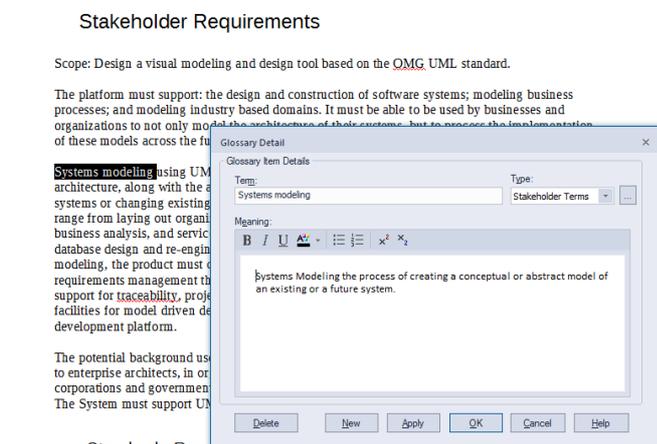
The benefits of the OLE Accessible document are:

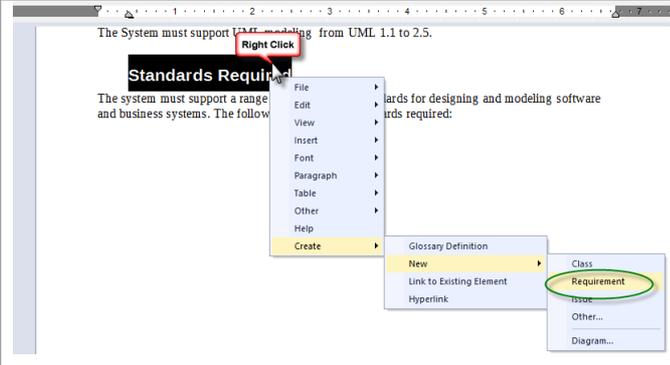
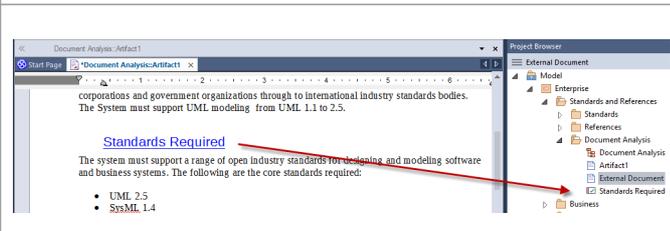
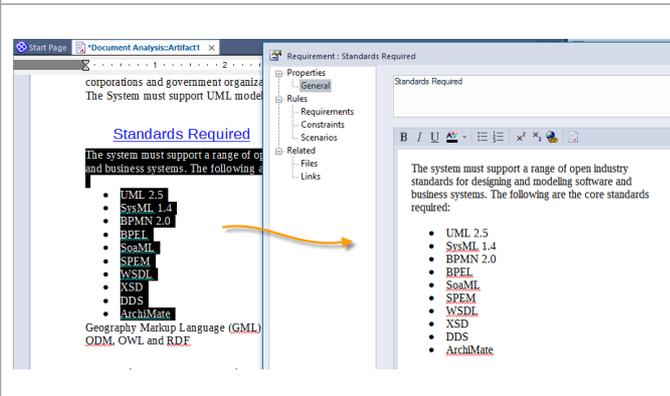
- Any file type can be used (including spreadsheets)
- For text documents you can drag text onto the diagram and automatically create Elements from this. The Document remains intact - un-altered (it can be updated in Word if preferred).

# Using Internal Documents

This covers creating an internal Document Artifact that uses the internal Editor for updating it. From this we will create new glossary entries and create new hyperlinked Elements.

The document formats that you can use are .Docx and .Rtf.

View	Process
	<p>In an <b>Document Analysis</b> diagram create a new <b>Document</b> Element.</p> <ul style="list-style-type: none"> <li>From the <b>Toolbox</b> select: <b>Artifacts   Document</b></li> <li>Drag this onto the diagram.</li> </ul>
	<p>Double-Click on the Document.</p> <p>In the <b>New Template for Linked Document</b> dialog, click on the <b>Cancel</b> button.</p> <p>Select in the Ribbon: <b>Document Edit   File   File   Import File</b></p> <p>In the <b>File</b> dialog select the document to import</p>
	<p>With access to your document in the internal document editor, you can now start to create Glossary terms and Elements from the text.</p>
	<p>To create a Model Glossary term from the document:</p> <ul style="list-style-type: none"> <li>Block select some text covering your new term</li> <li>Select <b>Create   Glossary Definition</b> from the context menu.</li> </ul> <p>In the <b>Glossary Detail</b> dialog add your description text.</p>

	<p>To create a Requirement Element using the text of the document:</p> <ul style="list-style-type: none"> <li>• Block select some text covering your new Requirement name.</li> <li>• Select <b>Create   New   Requirement</b> from the context menu.</li> </ul>
	<p>This creates an Element of that name in the Project Browser.</p> <p>The text used to create this is now a hyperlink to the new Element.</p>
	<p>Now add the definition of the Requirement by selecting the specific text to be added to the Requirement Element:</p> <ul style="list-style-type: none"> <li>• Block the text</li> <li>• Copy it (Ctrl+C)</li> <li>• Open the <b>Element Properties</b> (double-click on the Element in the <b>Project Browser</b>)</li> <li>• Paste the text to the Notes.</li> </ul>
	<p>The new Element can be placed on a diagram or it can be viewed in the Specification Manager.</p>

## More Information

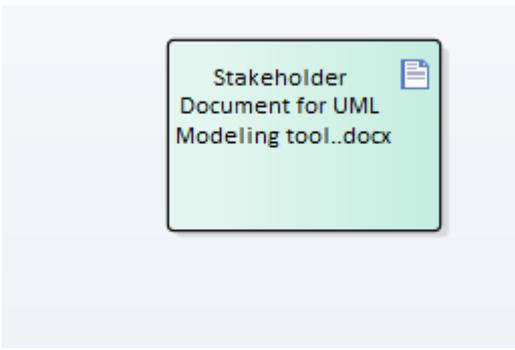
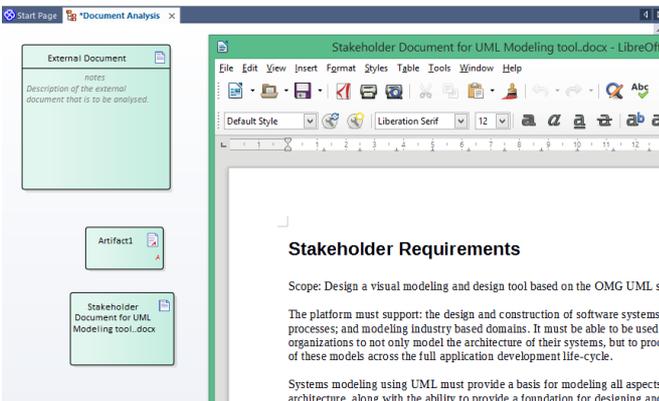
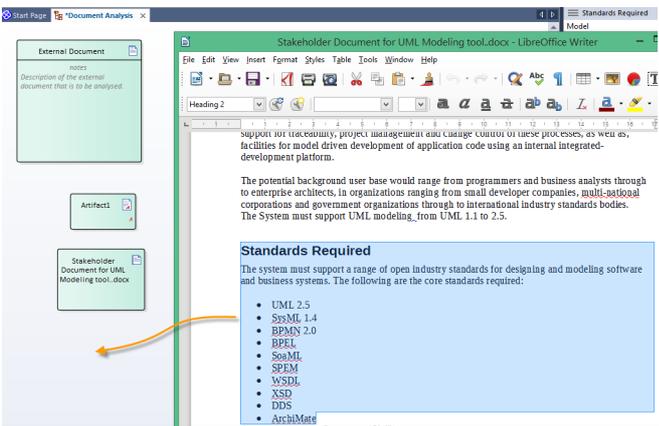
For more information see:

[Linked Documents](#)

# Using OLE Documents

The benefit of the OLE Accessible document is that you can drag text onto the diagram and automatically create Elements from this. The Document remains intact and un-altered (it can be updated in Word if preferred).

The following steps will guide you through a simple process of importing a document and creating Elements from it in the model.

View	Process
	<p>It is assumed that you have Document Analysis diagram open.</p> <ul style="list-style-type: none"> <li>• Open the File Explorer.</li> <li>• Select the file to be imported.</li> <li>• Drag this onto the diagram - from the prompt select the <b>Artifact Internal</b></li> </ul> <p>This will create a Document Artifact Element containing the Document.</p>
	<p>Double-click on the Document Artifact Element to open the external Word Processor.</p>
	<p>To create an Element from the text (for example a Requirement):</p> <ul style="list-style-type: none"> <li>• Block some text in the Word Processor</li> <li>• Drag the text to the diagram</li> </ul>
	<p>You will be Prompted to select an Element Type.</p> <ul style="list-style-type: none"> <li>• Select Requirement</li> </ul>

	Your Requirement Element is now contained in the model.
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## More Information

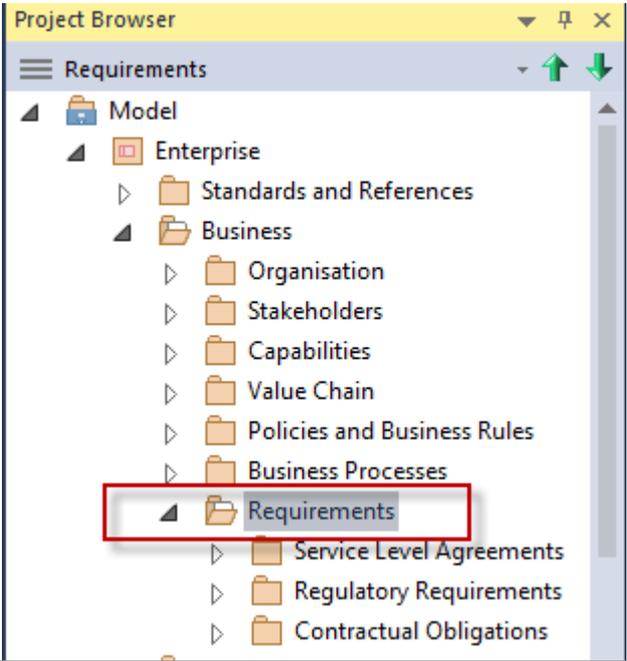
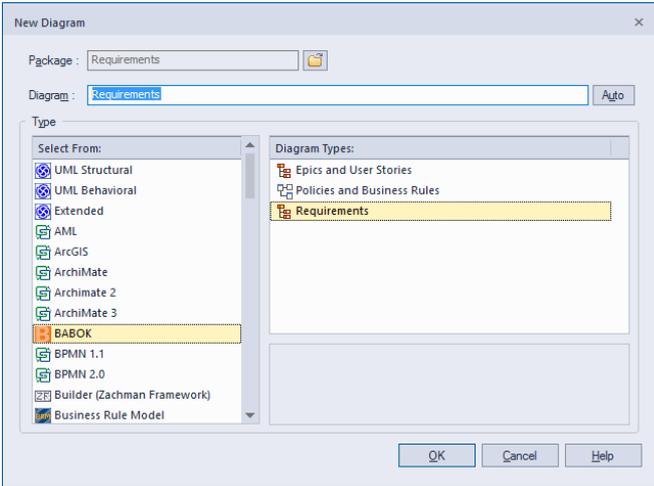
For more information see:

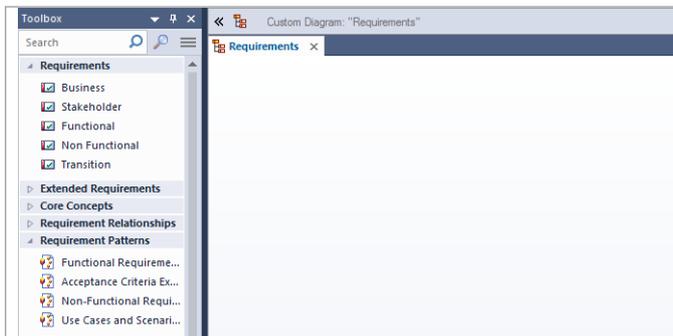
- [BABOK Help pages](#)
- [Document Artifacts](#)
- [Requirements Whitepaper](#)

# Create your own BABOK Diagram

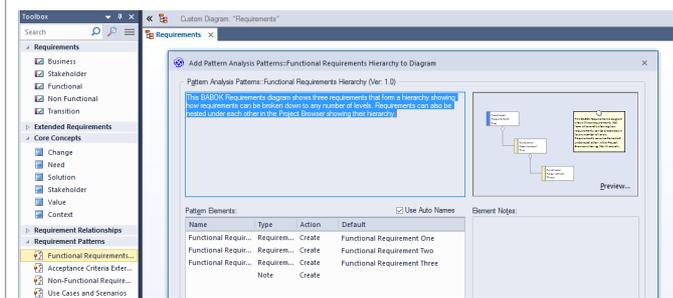
Enterprise Architect's MDG Technology from *BABOK Guide v3* includes a number of BABOK specific diagram types. These include some pre-defined **Patterns** for you to use as 'Stencils' when building your model.

The following steps will guide you through creating a BABOK requirements diagram and using a Pattern as a starter stencil for your requirement model.

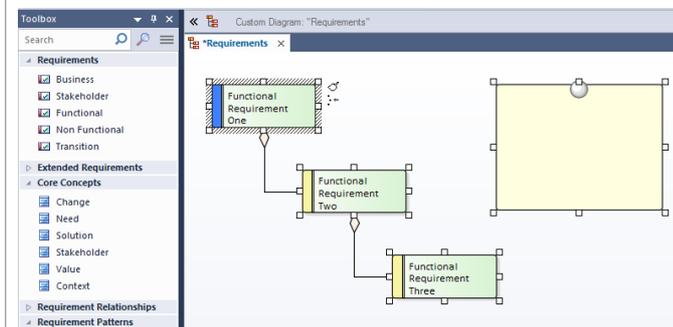
View	Process
 <p>The screenshot shows the 'Project Browser' window with a tree view. The 'Requirements' folder under the 'Enterprise' package is highlighted with a red rectangle. The tree structure includes: Model &gt; Enterprise &gt; Standards and References &gt; Business &gt; Organisation &gt; Stakeholders &gt; Capabilities &gt; Value Chain &gt; Policies and Business Rules &gt; Business Processes &gt; Requirements (highlighted) &gt; Service Level Agreements &gt; Regulatory Requirements &gt; Contractual Obligations.</p>	<ul style="list-style-type: none"> <li>• Select a <b>Package</b> in your Project Browser.</li> <li>• Select <b>Add Diagram</b> from the context menu.</li> </ul>
 <p>The screenshot shows the 'New Diagram' dialog box. The 'Package' field is set to 'Requirements' and the 'Diagram' field is set to 'Requirements'. In the 'Type' section, 'BABOK' is selected in the 'Select From' list, and 'Requirements' is selected in the 'Diagram Types' list. The 'OK' button is visible at the bottom.</p>	<ul style="list-style-type: none"> <li>• Select <b>BABOK</b> in the <b>Select From</b> column.</li> <li>• Select <b>Requirements</b> in the <b>Diagram Type</b> column.</li> <li>• Click on the <b>OK</b> button.</li> </ul>
	<p>This creates a blank diagram with the Toolbox set for Element-types ready for you to create your diagram.</p>



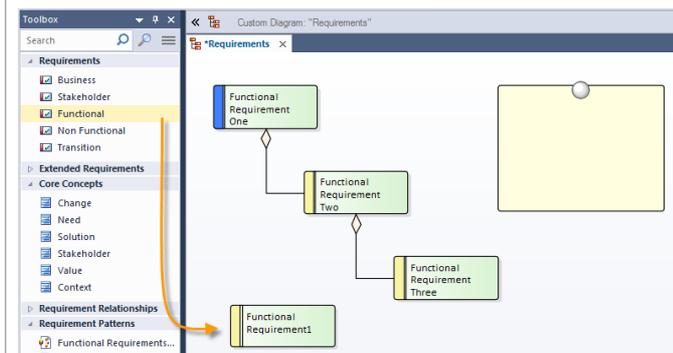
To create a simple starter example drag a Requirement Pattern onto the diagram. Click on OK.



This creates a simple starter pattern of Requirements.



You can now drag a Requirement-type on to the diagram, for example a Requirement of type Functional.



You can also work with this in the **Specification Manager**:

- From the **Design Ribbon** select **Specification View**.

Item	All Indicators	Status	Difficulty	Phase	Priority
Functional Requirement One	→	Approved	Medium	1.0	Medium
Functional Requirement Two	→	Proposed	Medium	1.0	Medium
Functional Requirement Three	→	Proposed	Medium	1.0	Medium
Functional Requirement1	→	Proposed	Medium	1.0	Medium

You can now start quickly add to each Requirement any textual details, as well quickly creating new Requirement elements.



## Additional Resources

### Product Overview:

- [Tools & Techniques for BABOK® Guide v3](#)
- [MDG Technology for BABOK Guide v3](#)
- [Pro Cloud Server](#)
- [BABOK Help Pages](#)

### Other Resources:

- [Webinar Tools & Techniques for BABOK Guide v3](#)
- [Specification Manager](#)
- [Requirements Whitepaper](#)
- [Product Brochure \(PDF\) - Enterprise Architect Tools & Techniques for BABOK Guide Sparx](#)
- [Insight Blog - Enterprise Architect Tools & Techniques for BABOK Guide v3](#)
- [Strategic Alliance Partnership International Institute of Business Analysis™ \(IIBA®\) & Sparx Systems](#)

