

## Financial Analysis

The *Financial Analysis* pattern creates a Document Artifact that can be used to detail the aspects of the Financial Analysis. The Artifact element is used as a surrogate for a financial file or web resource located outside the Enterprise Architect repository. The external file can simply be dragged onto the diagram and a link will be created. Alternatively a Document Artifact can be used that stores a word processor file inside the repository..

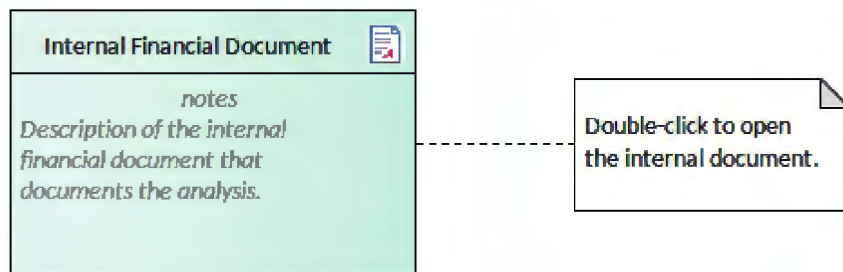


Figure 1. Shows a Requirements diagram with an Internal Document that is stored within the Repository and can be edited and viewed by double-clicking the element.



Figure 2. Shows a Requirements diagram with an External Document that is stored outside the Repository and can be edited and viewed by double-clicking the element. This can be web Resource, Spreadsheet, PDF or any other type of document.

## Discussion

The purpose of the pattern is to allow a Business Analyst, Business Architect or other stakeholder to create and view documents or files that store financial information related to the initiative or solution. It documents the predicted financial viability, stability, and articulates the benefit realization of an investment option. It includes a both the total cost of the change as well as the total costs and benefits that arise from using and supporting the solution.

It is typically used early on in an initiative to make a solution recommendation for an investment in a specific change initiative by comparing a number of different solution or solution approaches, based on analysis, which can include:

- Initial cost and the time frame in which those costs are incurred,
- Expected financial benefits and the time frame in which they will be incurred,
- Ongoing costs of using the solution and supporting the solution,
- Risks associated with the change initiative, and
- Ongoing risks to business value of using that solution.

## Reference

The following help topics will assist you learn about how to work with this pattern.

[Financial Analysis](#)

[Linked Documents](#)

[Artifact](#)

[Business Analysis Body of Knowledge \(BABOK\)](#)

[Traceability Tools](#)

[Documentation](#)

The following are some of the tools that will be helpful when working with this pattern.

[Linked Documents](#)

Linked Documents provide a way of incorporating extensive and highly formatted documentation for an element. While an element's notes are a useful place to provide brief and visible information about an element, a Linked Document can be used to create extensive documentation for an element including all the features you available in a typical word processing tool such as: Paragraph Formatting, Header and Footers, Table Images, Tables of contents and much more. For more details see the [Linked Documents](#) help topic.

#### Artifact

An Artifact can be used as a placeholder for a Financial Analysis file or web address such as a spreadsheet or document that resides external to the repository. The Artifact element can be hyper-linked to the external document allowing it to be launched from within Enterprise Architect. This provides a convenient way to reference the document inside the model for example by linking other elements such as Requirements to the document. For more details see the [Artifact](#) help topic.

#### Document Window

The Document Window is a powerful tool for generating, reading and editing narrative style information for an element. There are two tabs: the Dynamic Document Tab and the Linked Document Tab. The Dynamic Document tab generates documentation automatically from element information and the Linked Document tab can be used for reading and editing an element's linked document. For more details see the [Document Window](#) help topic.

#### Document Generator

The Document Generator is a powerful facility in Enterprise Architect that allows a Database Engineer or other stakeholder to create high quality corporate or technical documentation directly from the model, suitable for internal or external audiences. For more details see the [Documentation](#) help topic.

#### Element Discussions

The Element Discussion facility is a fully featured collaboration tool allowing modelers and model viewers and reviewers to communicate with each other directly inside the repository. Modelers using the full client or occasional viewers using WebEA can both post and reply to discussions and communicate and engage in chat. For more details see the [Element Discussions](#) help topic.

#### Specification View

The Specification View can be used as a way of working with any element type in a spreadsheet or word process view. It is particularly useful when there are a large number of elements as is typically the case when describing a system of any appreciable size. For more details see the [Specification View](#) help topic.

#### Relationship Matrix

The Relationship Matrix provides a spreadsheet like view of two groups of elements and the relationships that exist between them. It can be used as a powerful analysis mechanism to visually indicate how elements are related to each other and to discover which elements are missing relationships. For more details see the [Relationship Matrix](#) help topic.

#### Traceability Window

The Traceability Window automatically displays the relationships that exist between Use Cases and other model elements including up-process and down-process elements. The traceability tree view can be conveniently expanded to see deeper relationships and elements displayed in the window can be located in all diagrams in which they appear. For more details see the [Traceability Window](#) help topic.