

Best Practices in Graphical EA Modelling

THE *Open* GROUP
Making standards work®

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How we got here...

“iServer offers total flexibility in diagramming practices and standards”

“That’s nice. What diagram standards should we adopt then?”



Agenda

- ① Introductions
- ② General Principles
- ③ Diagramming Patterns
- ④ Diagramming Anti-patterns
- ⑤ Conclusions

General Principles



Know your audience

WHO will be looking at the diagrams?

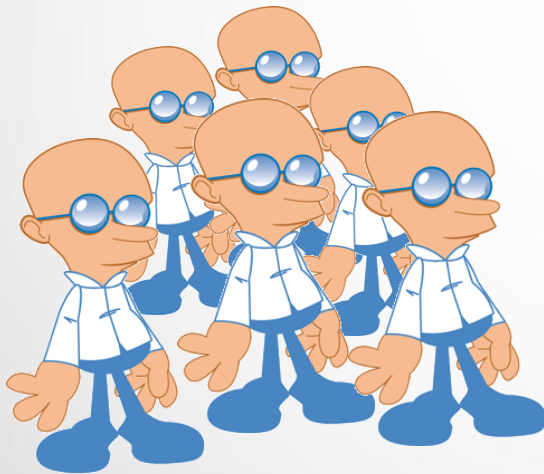
WHY will they be looking at it?

WHAT does the diagram show?

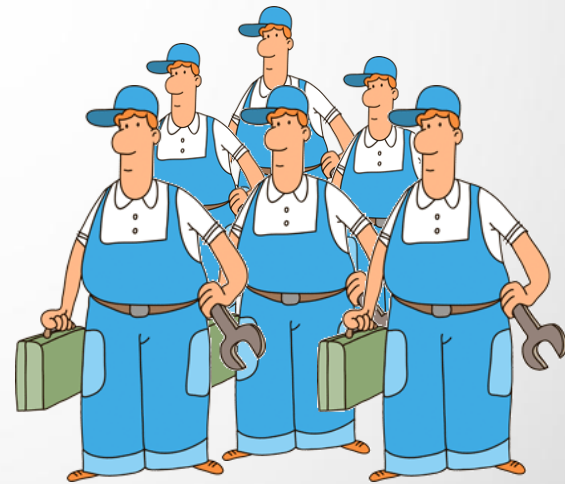
WHERE will they be looking at it?

HOW will they understand it?

WHEN – under what circumstances will it be used?



V.

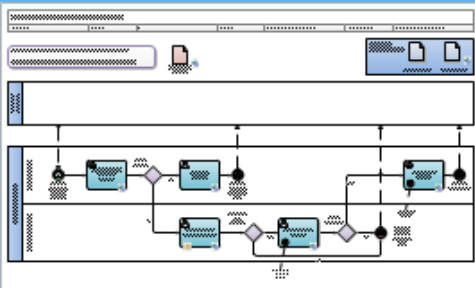


One diagram = One Message

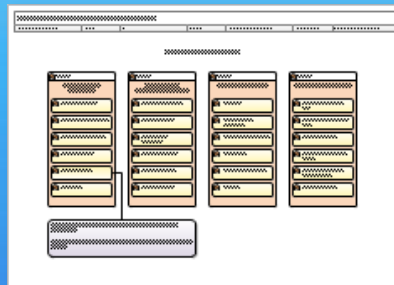
Diagram that try to say too much become confusing
Every diagram should have an elevator statement

What is the message of this diagram?

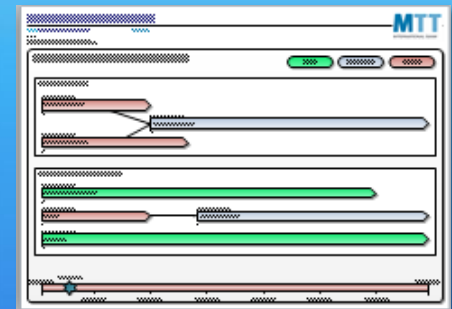
“This is how we validate suppliers”



“This is the functional decomposition for the HR dept”

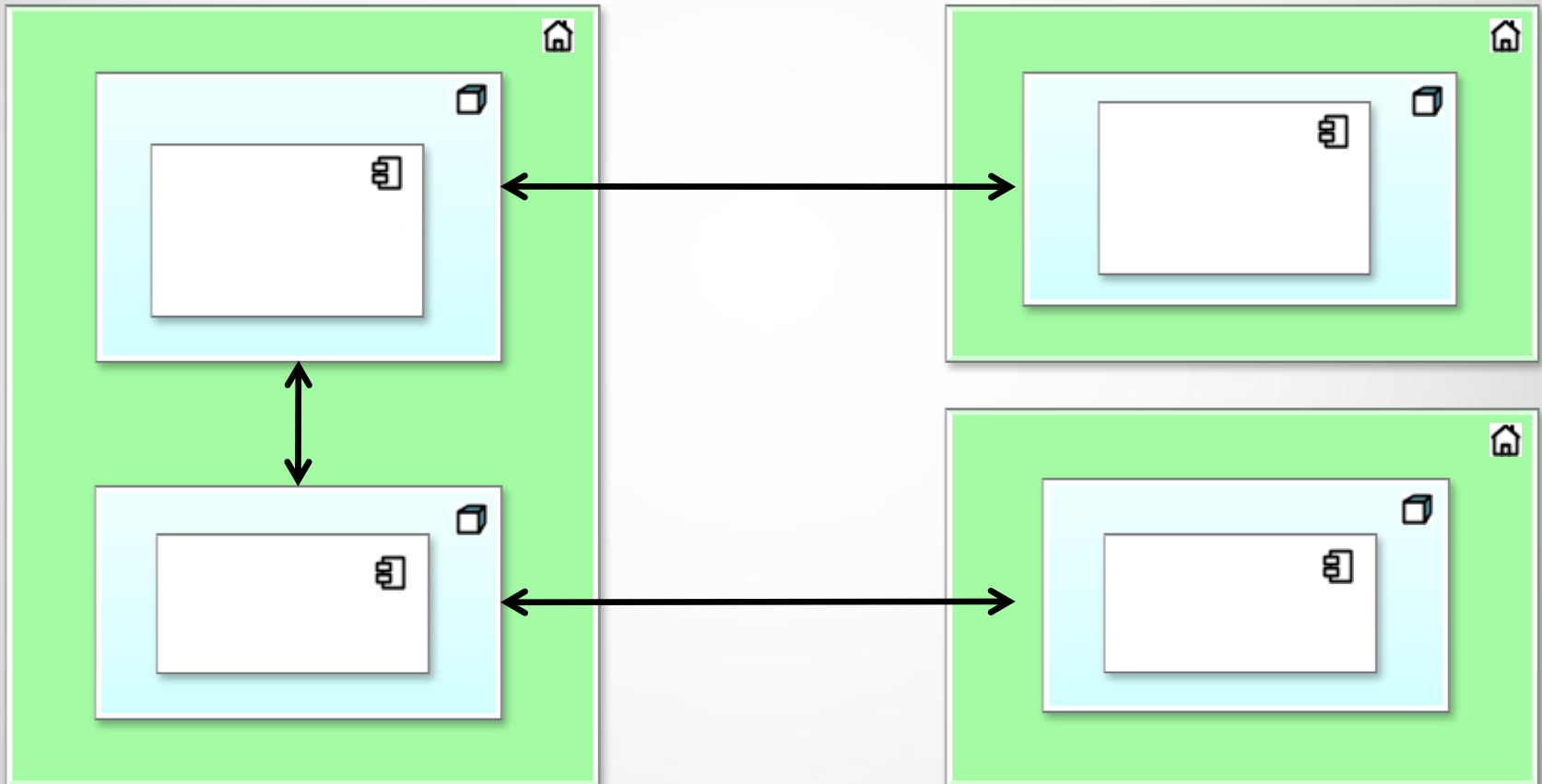


“These are the timelines for our ERP replacement program”



Use different symbols for different things

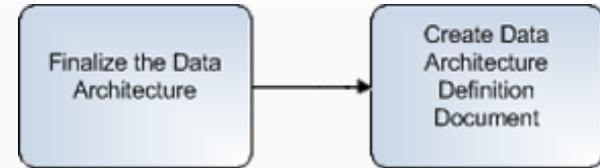
Using, e.g. a rectangle, for everything makes it unclear what is what



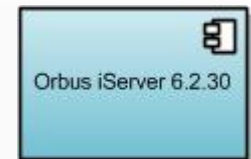
Use Consistent naming Standards

Consistency helps people correctly identify things
Leverage off any existing standards that exist

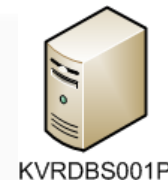
Process tasks = VERB+NOUN



Physical Applications = Vendor ProductName Version

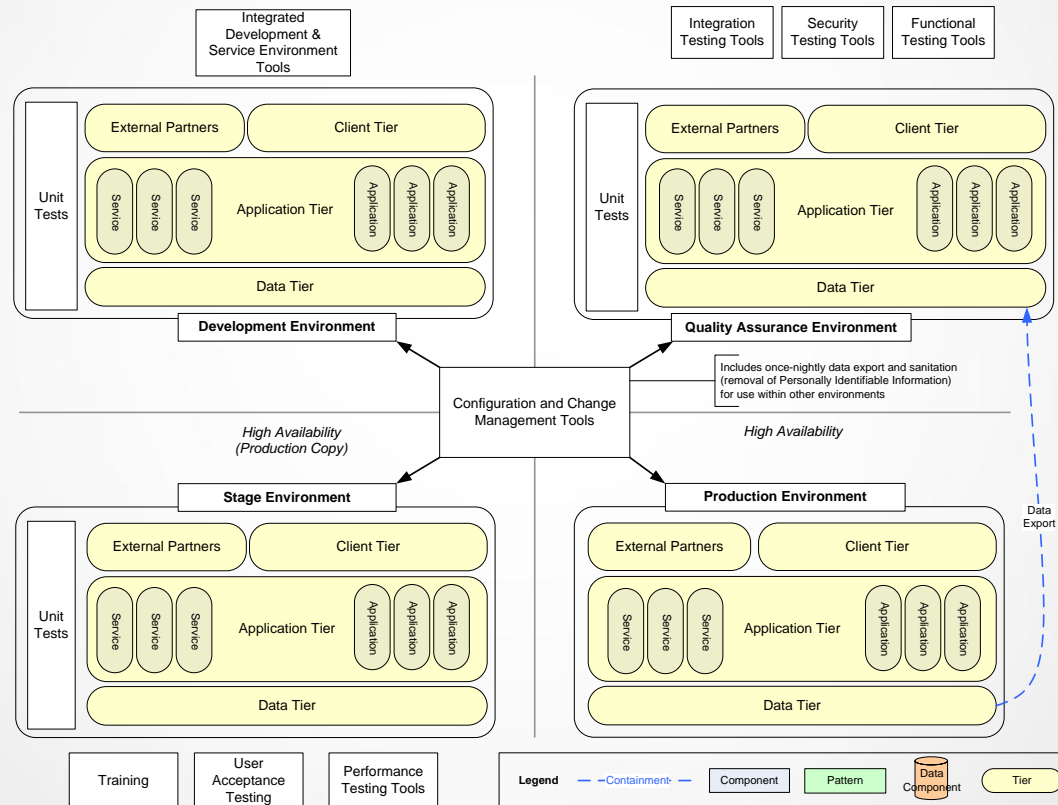


Infrastructure components = Hostname



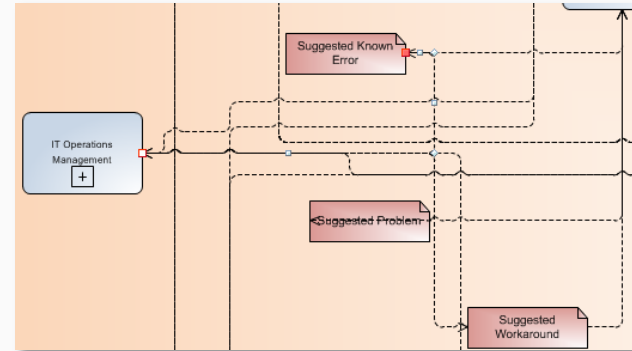
Clear Organisation

Use whitespace to separate items;
arrange things on a grid

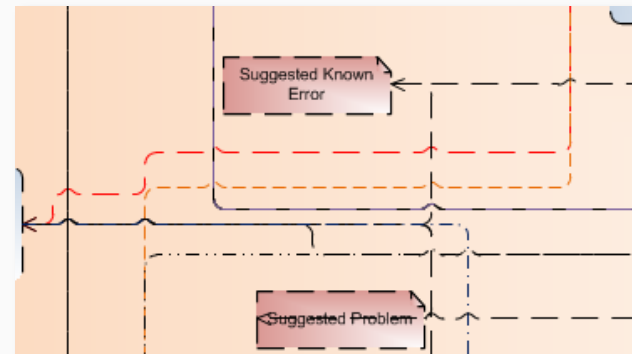


Route Connectors Carefully and Sparingly

Try hard to route connectors appropriately.

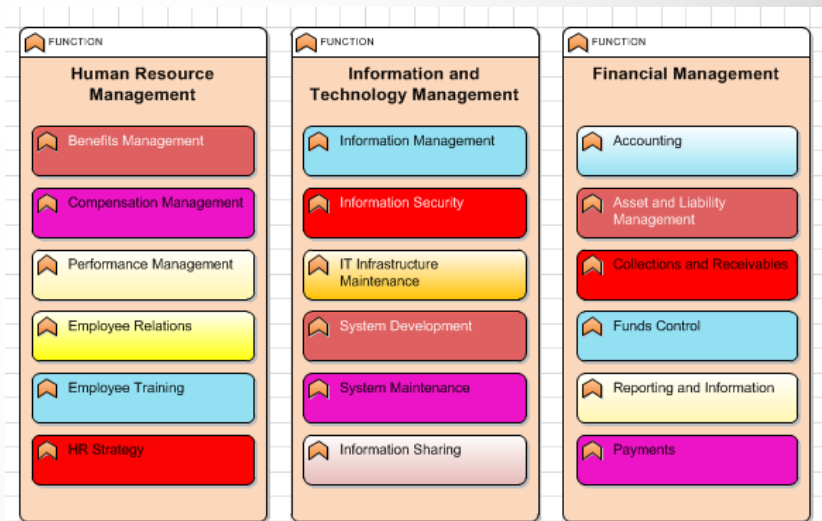
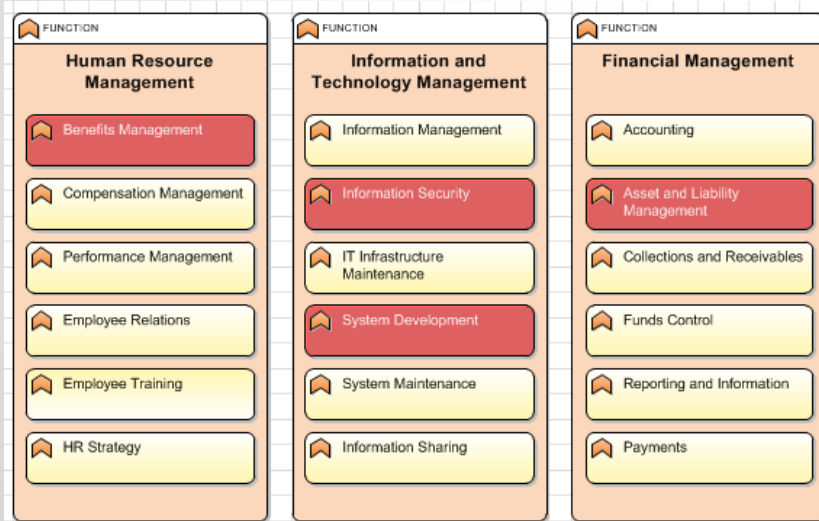


Consider colouring and/or using patterns to keep lines clear



Use colour carefully

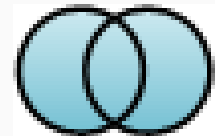
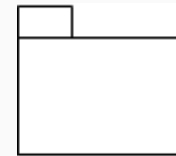
Don't use too many colours – and be aware of colour-blind issues



Use (and follow) standards



Develop Target
Business
Architecture
Description



Diagramming Patterns



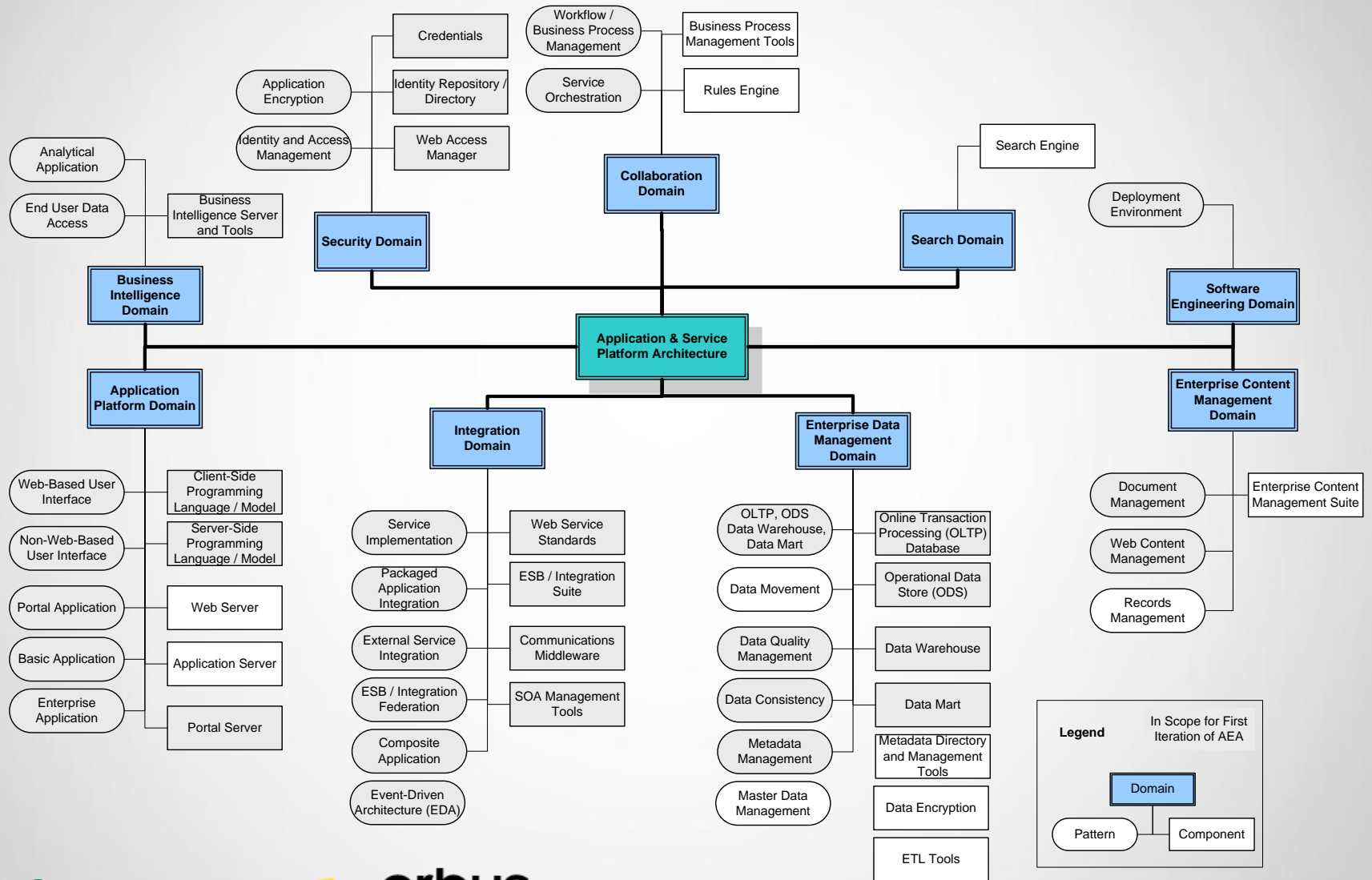
The Catalogue

Lists a set of items, grouped if appropriate

FEA.BRM.Mode Of Delivery					
BUSINESS REFERENCE MODEL	VERSION:	0	AUTHOR:	30/12/1899 00:00:00 by 0	
Mode of Delivery				2	
Knowledge Creation and Mgmt 202		Public Goods Creation and Mgmt 202		Federal Financial Assistance 202	
69	Research and Development	73	Manufacturing	80	Federal Grants (Non-State)
70	General Purpose Data and Statistics	74	Construction	81	Direct Transfers to Individuals
71	Advising and Consulting	75	Public Resources, Facility and Infrastructure Mgmt	82	Subsidies
72	Knowledge Dissemination	76	Information Infrastructure Management	83	Tax Credits
Regulatory Compliance and Enforcement 202		Direct Services For Citizens 202		Transfers to States and Local Gov'ts 202	
77	Inspections and Auditing	67	Military Operations	87	Formula Grants
78	Standard Setting / Reporting Guideline Development	68	Civilian Operations	88	Project/Competitive Grants
79	Permits and Licensing			89	Earmarked Grants
				90	State Loans
				Credit and Insurance 202	
				84	Direct Loans
				85	Loan Guarantees
				86	General Insurance

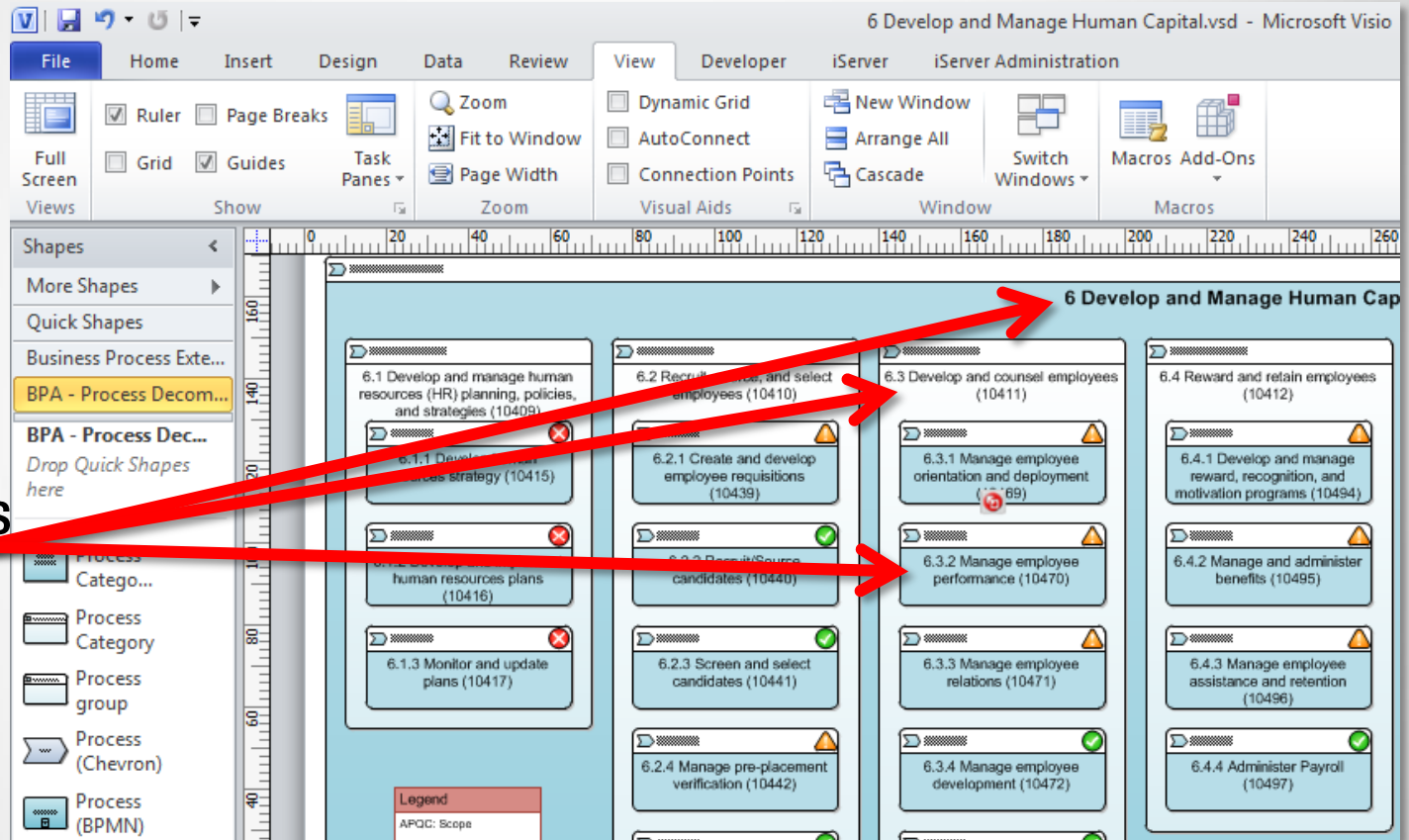
The Hierarchy (type 1)

Shows the decomposition



The Hierarchy (type 2)

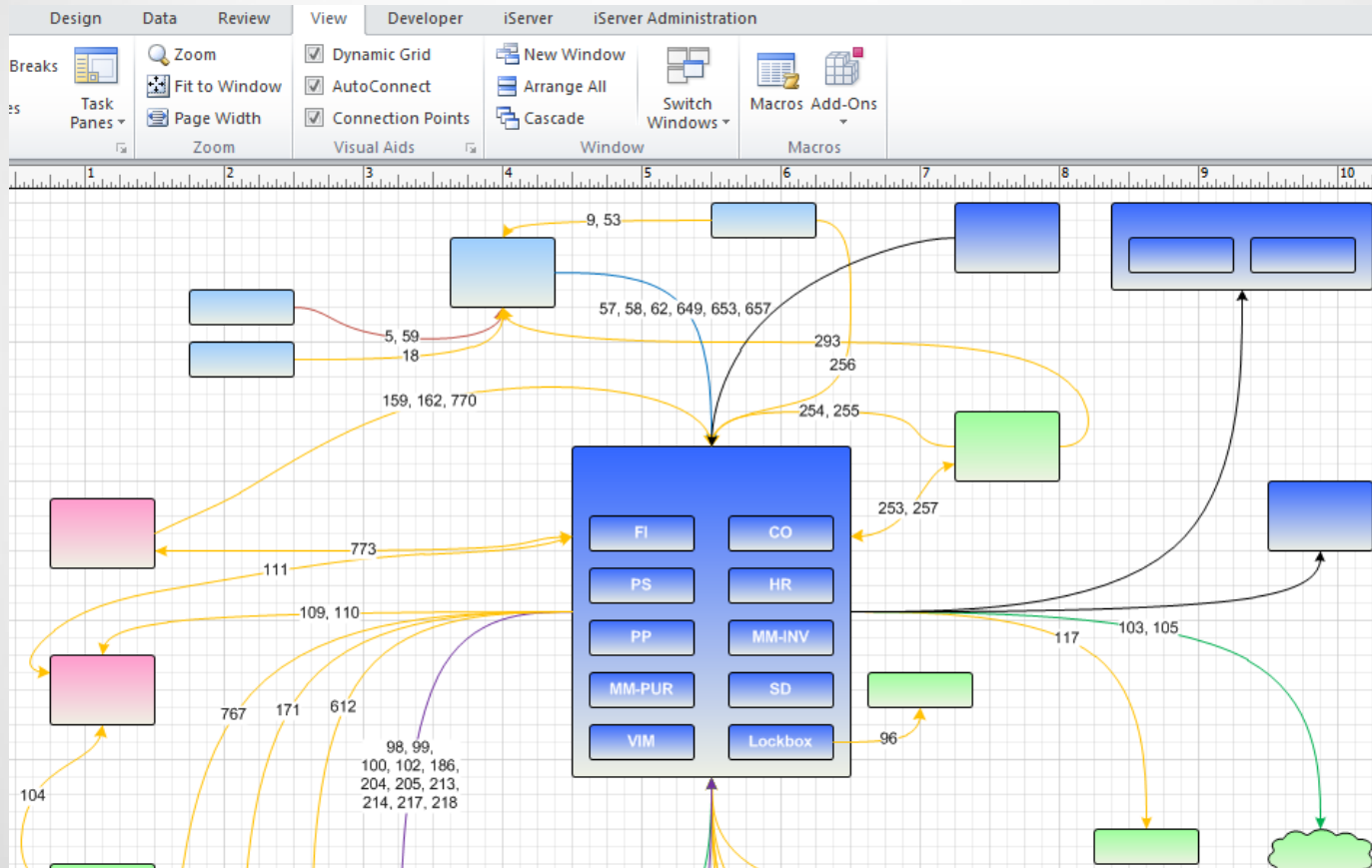
Shows the decomposition



Different levels of process

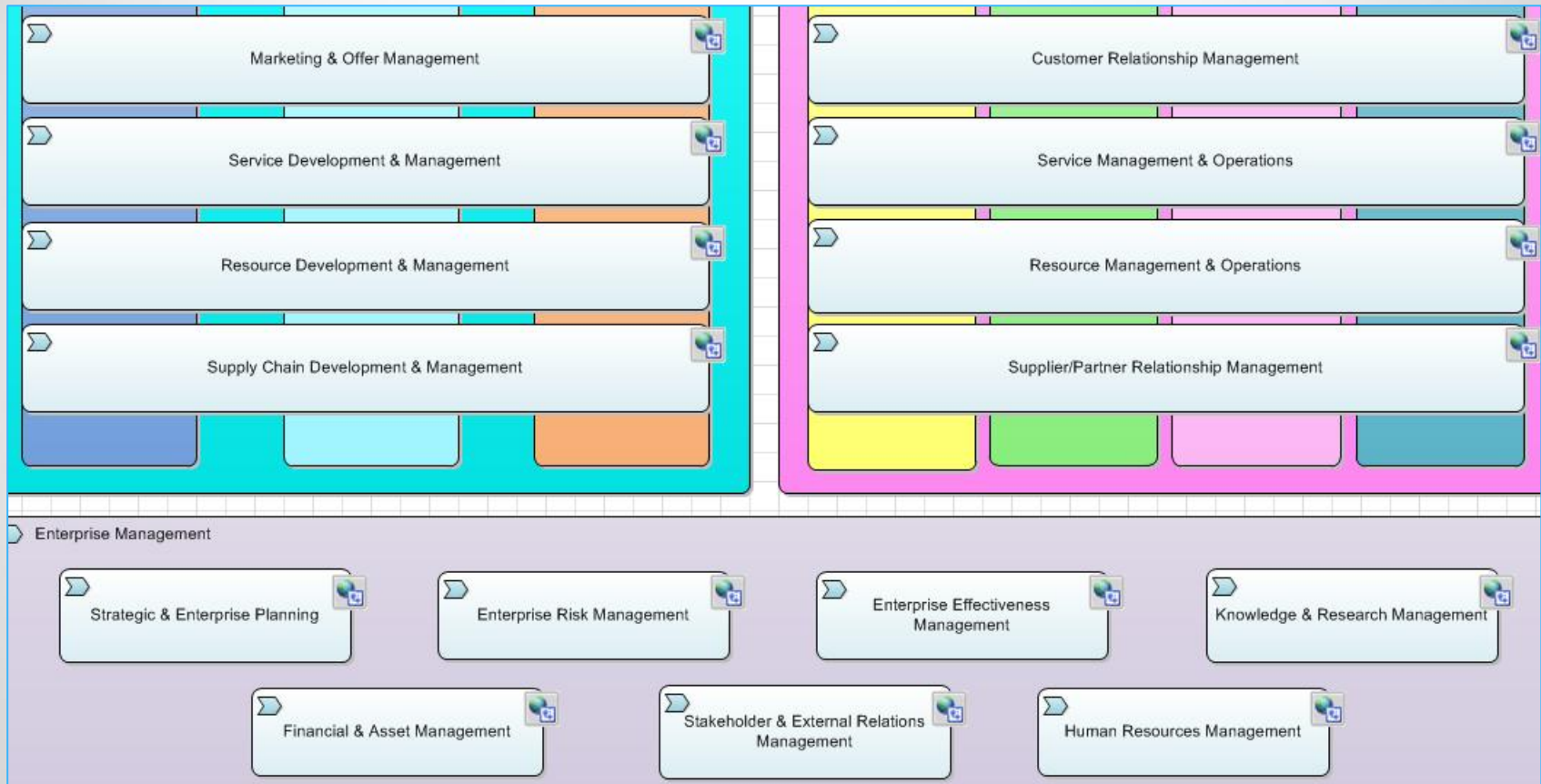
The Context Diagram

Shows a central item and what connects to it
BUT don't mix levels – use multiple context diagrams



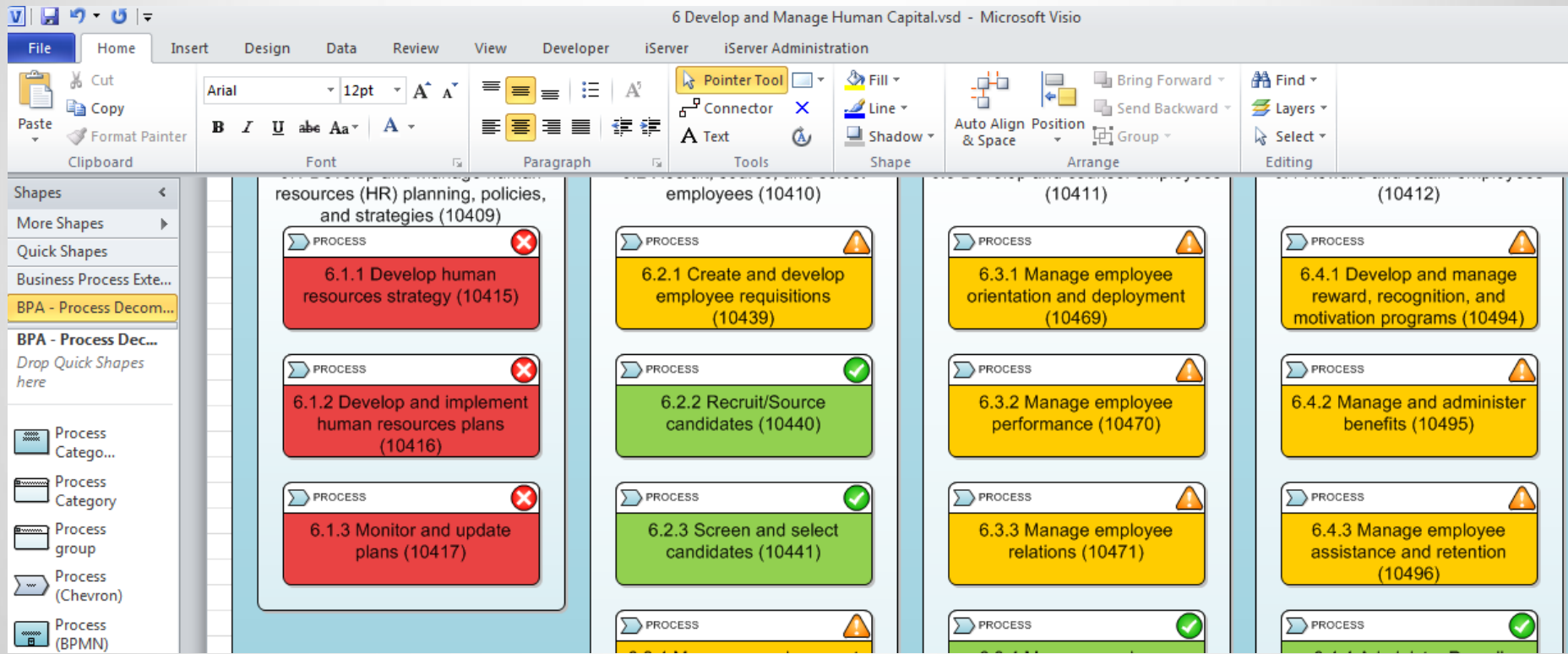
The Site Map

Acts as a jumping-off points
Used in conjunction with connectors to provide links



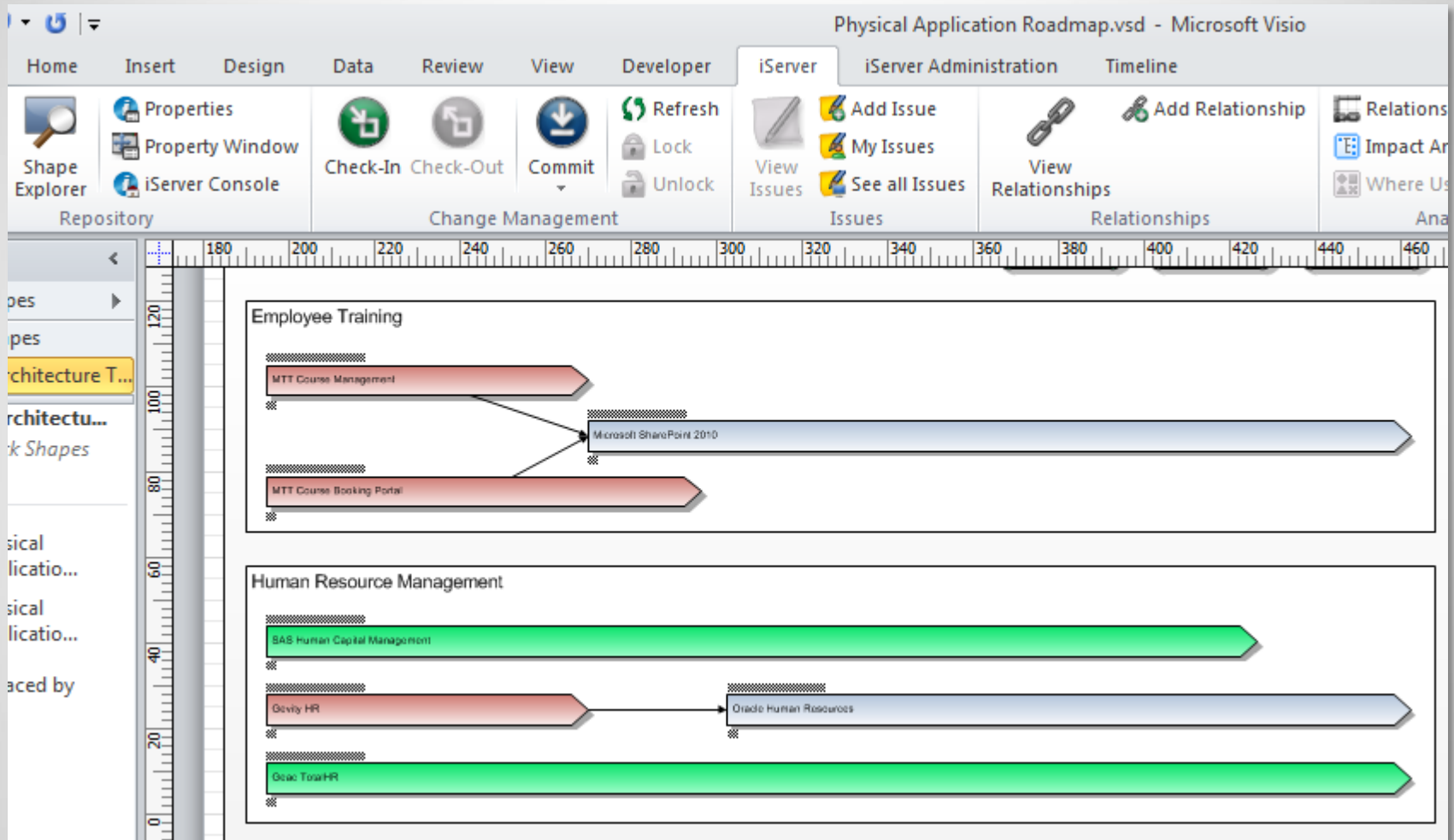
The Heatmap

Purpose: Give an at-a-glance feel for patterns of data
Be wary of colorblind considerations – preferably use icons as well



The Timeline

Shows relative durations

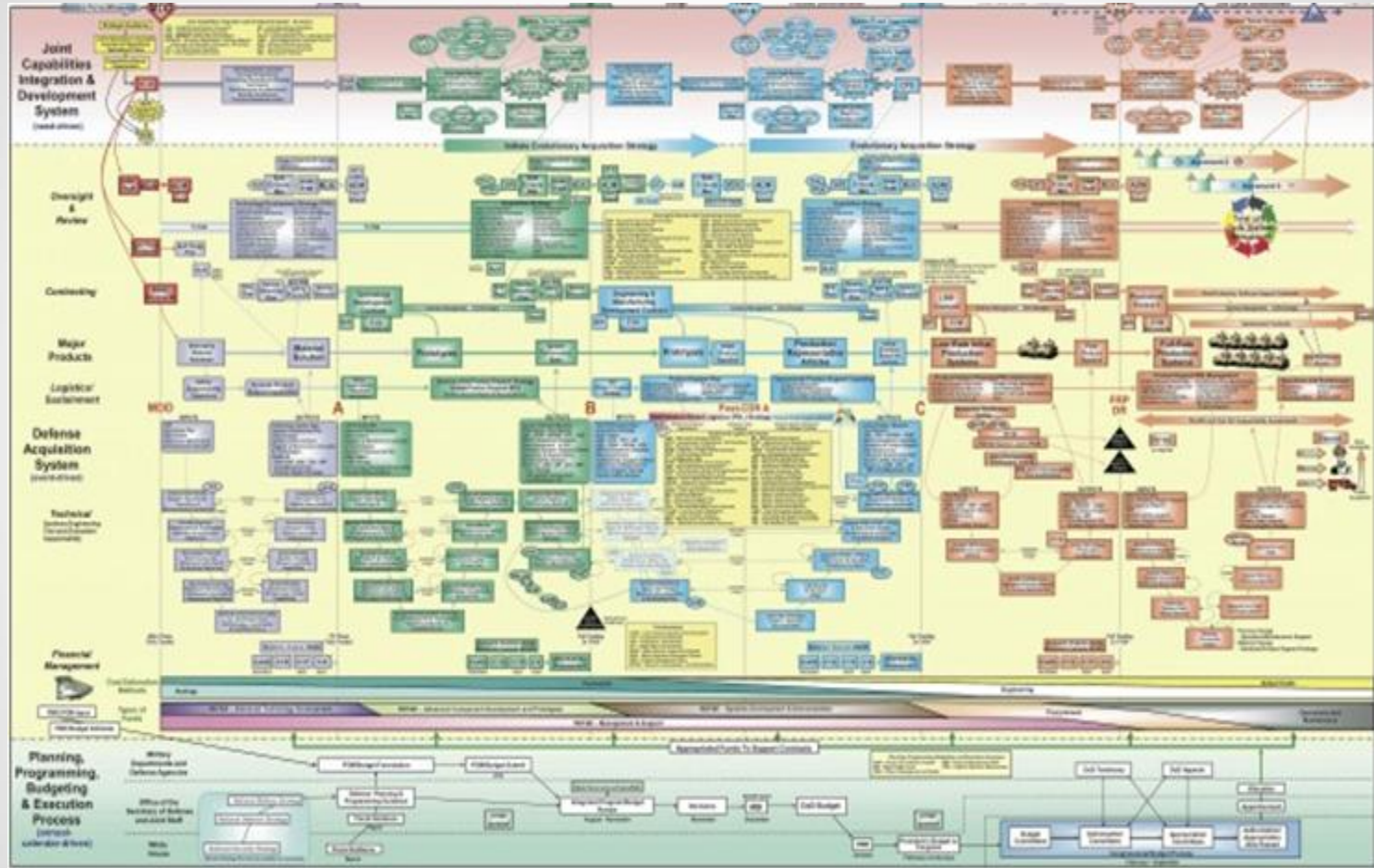


Diagramming Anti-Patterns

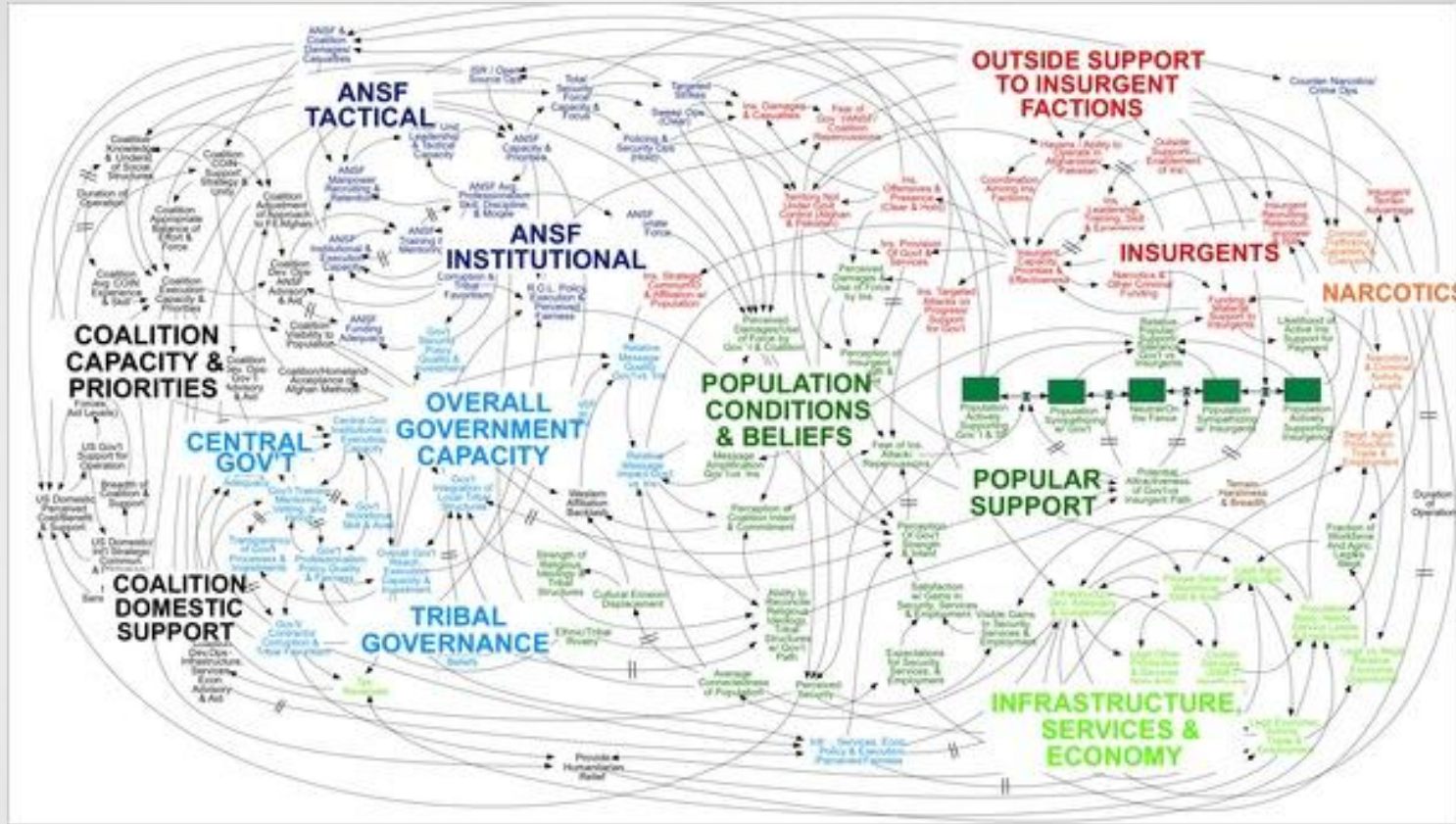


The 'So What'

Attempts to show every aspect of a situation :
leads to a cluttered diagram – where do you get started?

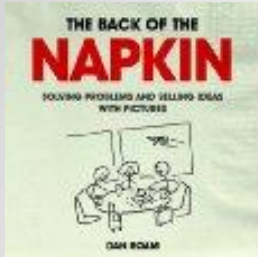


The Megadiagram

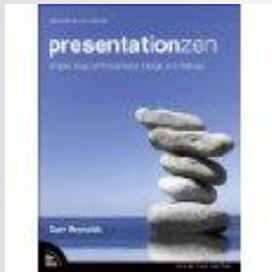


“When we understand that slide, we will have won the war”
 - General Stanley A. McChrystal

Recommended Reading



“The Back of the Napkin”
- Dan Roam



“Presentation Zen: Simple Ideas on Presentation Design and Delivery”
- Garr Reynolds

Questions and Answers



Download this Presentation and White Paper from:

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Visio stencils (TOGAF/ArchiMate/BPMN):

(<http://orbussoftware.com/downloads/>)