

# White Paper

## Models Are More than Just ‘Wall Hangings’ The importance of treating and using Models as more than static ‘Objects’

WP0032 | May 2012

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David and Roderick are passionate about helping organizations understand and document their own business processes, using frameworks such as APQC's Process Classification Framework and standards such as BPMN as well as applying simple approaches to improve and simplify these business processes.

**As we explained in a previous white paper *Definition Documents and Naming Standards: Key to an effective Business Information Repository*, enterprise architecture and business process analysis repositories have become key sources of organizational knowledge and consequently important sources of information to support decision making within organizations.**

However, making the best decisions for an organization requires the availability of best quality information. To ensure you have this information, you must be confident that it is not only built and maintained within the repository, but is also being actively used within the organization.

Why? If the information is not being actively used, it is highly likely that the models and information contained within the repository do not reflect how processes, data, application and technology are actually being applied within the organization.

Consequently, a big risk to any modeling initiative is that it ends up being seen as nothing more than a ‘wall hanging’ or ‘shelf-ware’.

What do we mean by ‘wall hangings’ or ‘shelf-ware’? Essentially we mean that the models become seen by people within the organization as nothing more than pretty snap-shots, which are useful only to put on the wall for show or to stick on the bookshelf for use as a reference to show someone, but not actively used on a day-to-day or even minute by minute basis.

For example, process modeling can very easily become ‘shelf-ware’ or ‘wall-ware’ when the effort and investment spent on modeling is not

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used. If the process models are not used the knowledge gained from modeling is lost.

Historically, organizations could blame technology for not being able to share processes and supporting information but this is no longer the case. These days many tools support collaboration and if the sharing of process information is not happening then it's most likely down to an organizational change issue.

The major benefit of tools such as Orbus Software's iServer is that it provides a collaborative mechanism that allows multi-dimensional views across an organization. Consequently, this means that the process can truly become the link between people, process and technology.

The importance of actively using the models and information contained within your repository applies to all domains (i.e. Business, Data, Application and Technology), but it is particularly relevant for models that can be used by people within the organization and can benefit from their active participation, e.g. the process sub-domain.

## **Business Models**

### **Overview**

Every well-run organization, regardless of size, has a mission, a vision and a strategy. In a small operation this may reside in someone's head, never-the-less, it is important that these are aligned to processes and to organizational structure and are supported by technology.

Knowing how much information to document is important. Too little and you limit its value, too much and it will just be ignored. Well-documented processes are central to good management of an organization.

As an example, the strategy sets out what it is you want to do, the plan sets out how you want to do it, your processes link together what you do, who does it and the tools required to carry the process out.

For this to work it is important that an organization captures the supporting information against Processes, that is:

- Application;
- Information; and
- Technology.

As with all documentation, knowing how much to capture and what to capture is all important. Processes that are maintained and remain relevant play an important role in facilitating an understanding of the business and in communicating what the business does. The process is there to provide sufficient information to allow the work to be performed, to form the basis of training individuals on what they need to do and to enable communication within and across teams about a process.

Processes provide support to management because they allow them to monitor, manage and measure work. In addition, processes that are actively used mean improvements to the business can be undertaken with confidence, whether it is changes to tools, people or activities.

## **Knowing where to start**

Processes are often described based on the state they are in, normally these are:

- Current;
- Improved As Is; or
- Future or Target state.

As already stated, one of the most difficult calls of judgement to make is knowing where to start and how much information to document. When deciding where to start documenting and how much information to document, you must ask yourself:

*“What is the business problem that needs to be solved by documenting the process?”*

A common language Regardless of the type of process to be modeled it is important that a common language is used to ensure that the information contained in a process is understood. Without a common language to describe a process, organizations find themselves documenting the same process multiple times to cater for different audiences with the end result not only being a waste of effort and money but also with the risk that there is no single source of truth for the process.

Today one of the most widely used standards is BPMN 2.0 and many tools such as iServer provide templates and even diagram validation of BPMN to get an organization underway.

What to document Modeling very quickly gets left on the shelf when information is captured for the sake of capturing it and the business is not clear about why it is modeling. Businesses undertake modeling for a number of reasons:

- A need to provide training on the process
- A need to address changes in policy or to manage risk
- A need to change systems
- A need to identify areas for improvement

The table below explains what is meant by ‘Current’, ‘Improved As-Is’ and ‘Future State’.

<b>Business Process Model</b>	<b>Definition</b>	<b>Suggested use</b>
Current	The activities that describe the present process.	<ul style="list-style-type: none"> <li>• To identify areas for improvement</li> <li>• To inform training requirements</li> <li>• To remove process variation</li> <li>• To set the scope for work programs</li> </ul>
Improved As Is	The activities that describe an improvement on the present state.	<ul style="list-style-type: none"> <li>• To implement process change</li> <li>• To implement organizational change</li> <li>• To measure process change</li> </ul>
Future State	The activities that describe a desired future process	<ul style="list-style-type: none"> <li>• To have a defined state for a business restructure</li> <li>• To have a defined state for a new system</li> <li>• To meet a new business opportunity</li> </ul>

The use of process repositories and process web portals today makes the capturing of supporting information much easier than it used to be. Difficulties in capturing supporting information today relates more to cultural or change issues than an inability to access information.

The other great benefit of these tools is that processes can be readily used when they are easily accessible and the more they are used the less likely they will become out-of-date shelf ware.

## Information Models

### Overview

On its own, information models are probably the least of the domains to be impacted by the collaborative aspects of keeping models relevant.

However, information used within an organization is usually largely defined by a combination of processes and applications.

Typically, data models are constructed from the information used within:

- Processes; and
- Applications.

## **Information usage**

### ***Using Information with Processes***

While documenting your organization's processes, such as using the Business Process Model and Notation (BPMN) standard (either V1.x or 2.0), it is normal to document the information that flows between processes or activities.

This can be at various levels of abstraction, depending on the level of detail being documented and the particular reasons for documenting the processes.

For example, if your organization is documenting processes to improve the use of consistent standardized processes and procedures, then it is likely you will want to show:

- The inputs to each process, in terms of what information is required and where the information is obtained, potentially showing what forms or application screens are used; and
- The outputs of each process, in terms of what information is produced and where the information is recorded, potentially showing what forms or application screens are used.

Information models can also be used to show the flow of messages and data between processes in both transient forms, such as a message in a message flow, and persistent forms, such as data stores used to hold and contain data until needed.

When various forms of information models are being defined and held within the repository and then used (and re-used) within process models, the models are only useful if they are actively maintained and used collaboratively. This is best done by providing easy access to all relevant stakeholders through a portal that displays and links to the various models, such as that capability provided in Orbus Software's iServer Portal module.

## ***Using Information with Applications***

In a similar fashion to process, information models represent the interfaces between:

- Two or more application components, representing the details of the information used in the interfaces between application components; or
- A process and an application component, representing the interface between the process and the application component.

It is important that both of these interface specifications are actively maintained and available for use by users of process models and application developers who both need to understand application interfaces.

## **Application Models**

In enterprise architecture terms, the application domain is linked across all other domains, namely:

- Business;
- Information; and
- Technology.

As we have already explained, there are a number of circumstances where linking across the domains delivers benefits which are extended through collaboration.

However, in addition to the examples previously outlined (namely, applications used in processes and the information requirements of application interfaces, between both processes and an application or between two applications) there are additional links, between:

- Application components, in terms of the interaction and grouping of application components; and
- Technology components, in terms of how technology underpins the application components.

As with all these inter-domain relationships, unless they are actively maintained and then actively used, they will become out-of-date and of little use.

# Technology Models

Technology models are often speciality areas with enterprise architecture repositories. Depending on their context, technology models can be:

- Relatively simple, for when the basic technology platforms and components on which application components are implemented; or
- Relatively complex, when detailed solution architectures are used to document the complete (and hence detailed) set of technology platforms and components on which application components are implemented.

Regardless of whether technology models are simple or complex, they will rapidly become useless if they are not actively maintained and kept up-to-date as they are likely to be regularly used despite whether these models are being used to either:

- Help support your Organization's Configuration Management Database; or
- Help your Technology Support team to monitor and maintain your Technology.

## Pulling it all together

### Overview

Using the example of process models and their interactions with other models, we will illustrate the importance of:

- Not treating Models as 'Wall Hangings' or 'Shelf-ware'; and
- Providing mechanisms to provide feedback and raise issues when they are identified.

# Example Models

## Process Models

Using iServer, business processes are developed/defined in Visio and committed to the iServer repository by the person documenting the processes, for example:

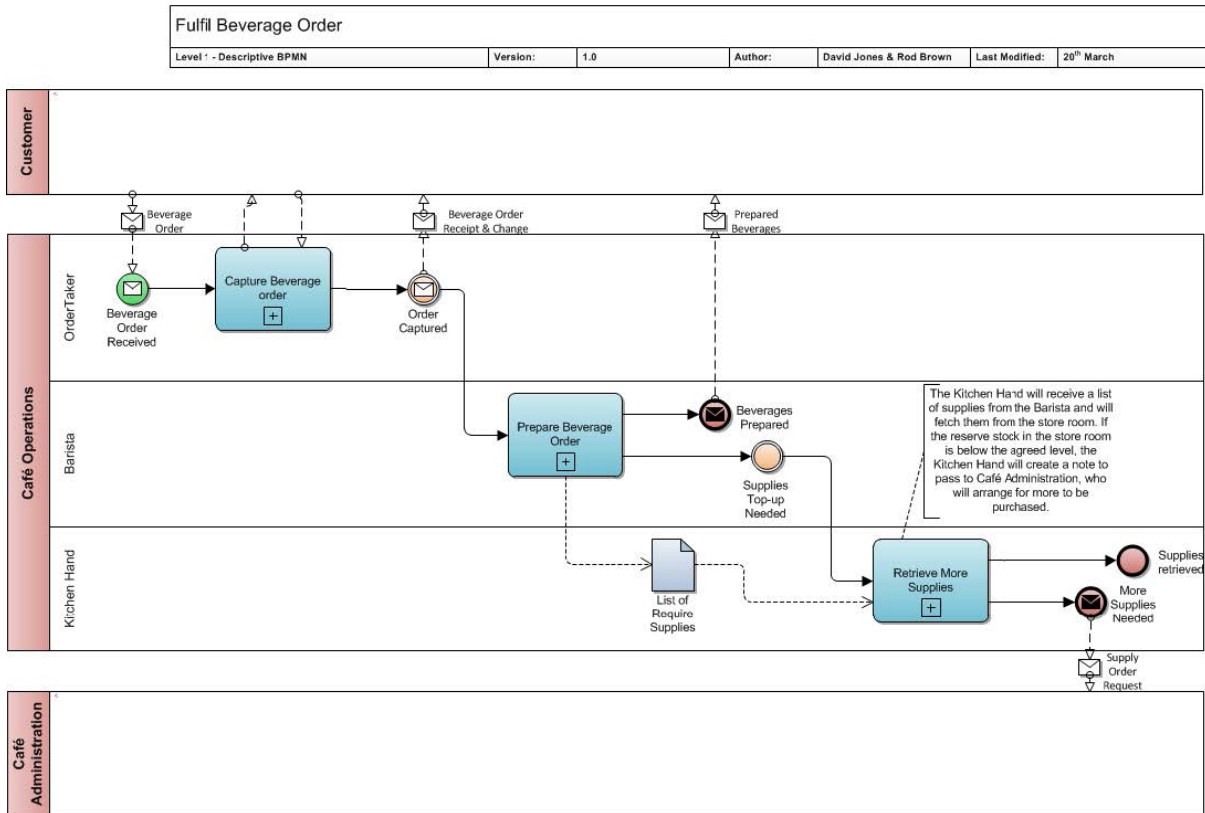


Figure 1: Example of a High-Level BPMN Process Diagram in Visio

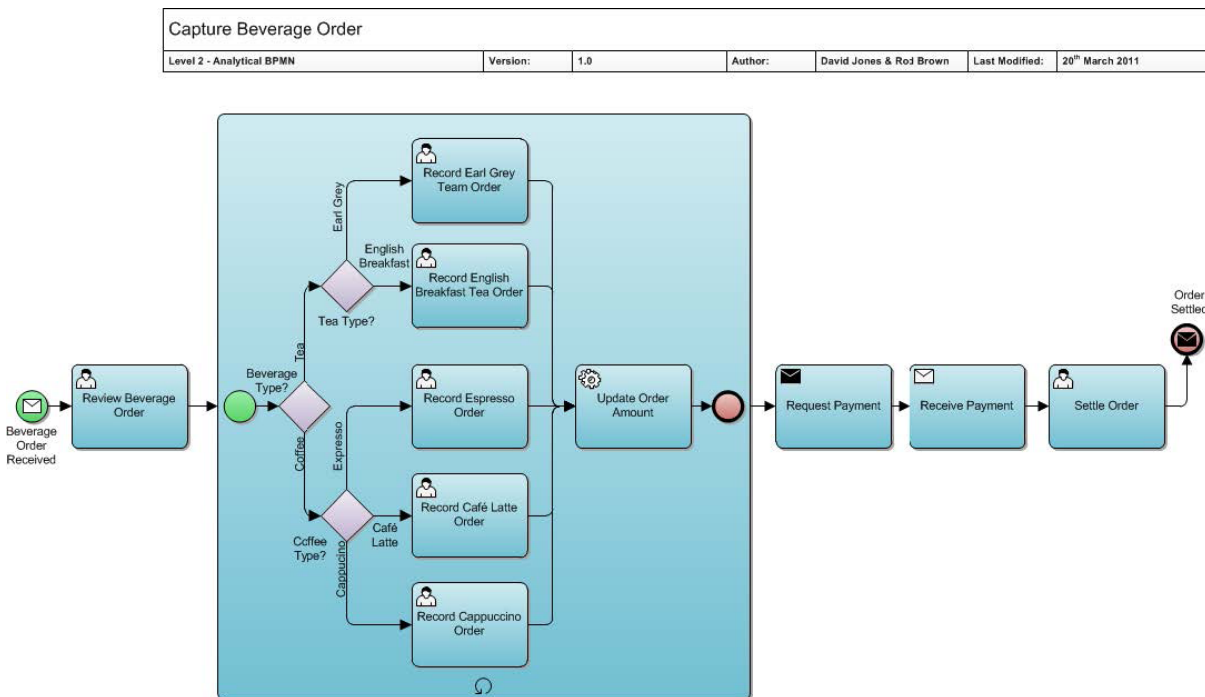


Figure 2: Example of a Lower Level BPMN Process Diagram in Visio



Other people are able to view the Processes via the iServer Portal, for example:

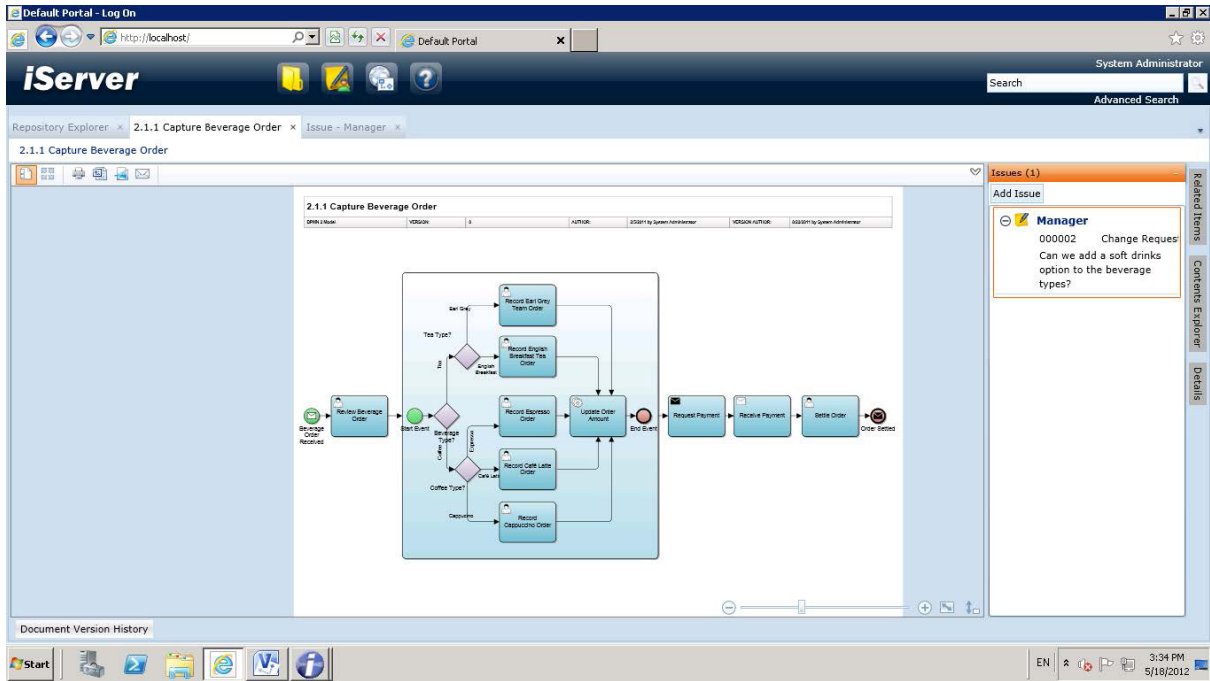


Figure 3: Lower Level BPMN Process Diagram Viewed in iServer Portal

As well as using Portal to view process diagrams, people are also able to view definitions, provide feedback and raise issues, as shown below:

Figure 4: iServer Portal 'Add Issue' facility for Lower Level BPMN Diagram

The feedback is then provided to the person who created the diagrams in iServer:

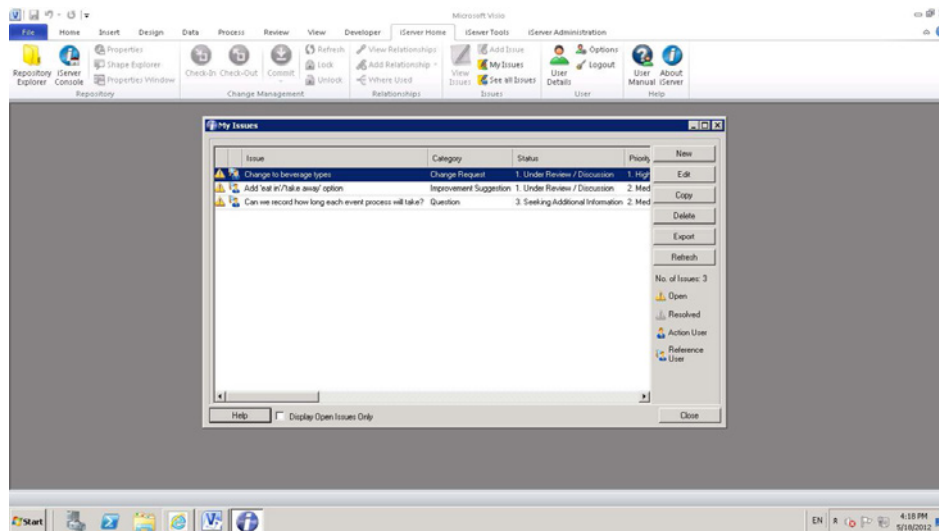


Figure 5: 'My Issues' as seen by person who created the diagrams in iServer

## In summary

As we have explained on a number of occasions in this white paper, models in any domain that are not actively maintained will rapidly become out-of-date and people will no longer trust the information contained in them.

At this point, these models will have reached the point of being treated as no more than 'Shelf-ware' or 'Wall Hangings'.

However, if the information within the models is maintained and then actively used in a collaborative manner, the models become living and breathing documents within the organization.

Although it is possible to achieve this without appropriate technology and tools, the provision of appropriate tools and technology, such as the Portal and Publishing modules of Orbus iServer, enable easy access to models within the repository.

In addition, the provision of mechanisms for people to provide feedback and raise issues when they are identified and the ability to address these items, are important functions that keep the models relevant within the organization.

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