OSLC in the context of Strategic Planning for IT

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Overview

- About Corso

- What is Strategic Planning for IT?

- What is OSLC and Jazz?

- Benefits

- SPP Overview

- Examples

About Corso

- Corso decades of EA and Strategic Planning experience

  - Company founded to execute IBM vision with background as IBM EA and Cloud product management team

  - Founders are co-authors of original BPMN specification

  - IBM Partner

  - Creators of ArchiMate solution for IBM Rational System Architect

    - Accredited as 'Ready for Rational'

  - Product focused

  - Unique provision of IBM Products as SaaS offering

Locations
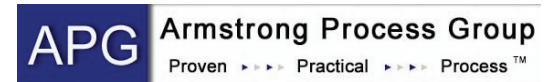

- Corso Location
- Partner/Distributor

- Headquarters in United Kingdom

- New York office serving Americas

- Distributors and partner network for rest of the world

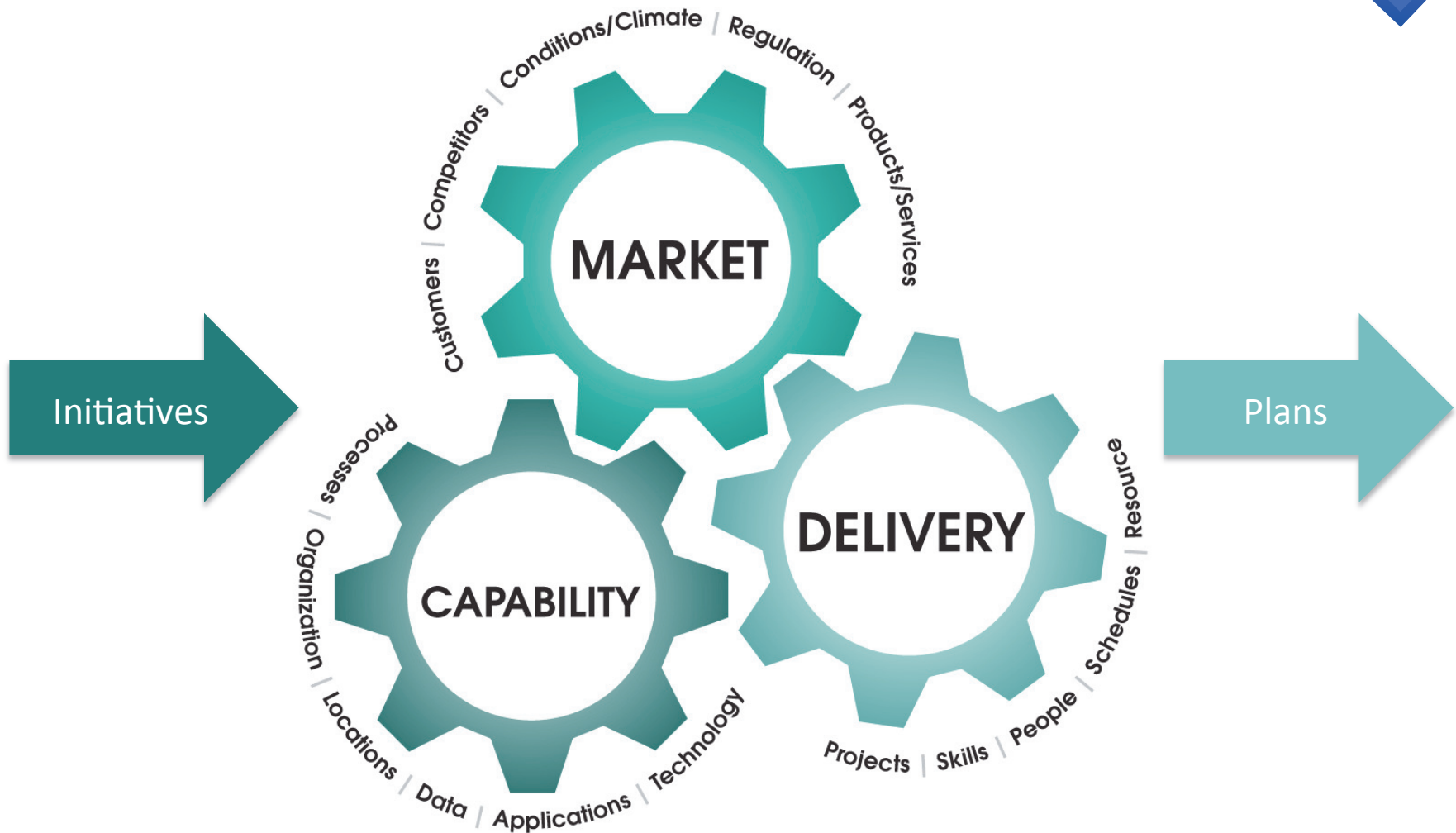- Customer support available globally

Customers and Partners

Strategic Planning for IT

- Strategic Planning for IT allows organizations to
    - Capture ideas and initiatives from all stakeholders
    - Bind EA, demand management and solution delivery together
    - Adapt IT to respond efficiently to market needs
    - Ensure all investments have a sound business case
    - Assess the impact of change on the organization
    - Communicate and plan project portfolio
    - Provide stakeholders with the correct type of information at the right time for informed decision making

Entry Points for Strategic Planning

Strategic Planning Platform

Initiatives

Plans

MARKET

Customers | Competitors | Conditions/Climate | Regulation | Products/Services

CAPABILITY

Processes | Organization | Locations | Data | Applications | Technology

DELIVERY

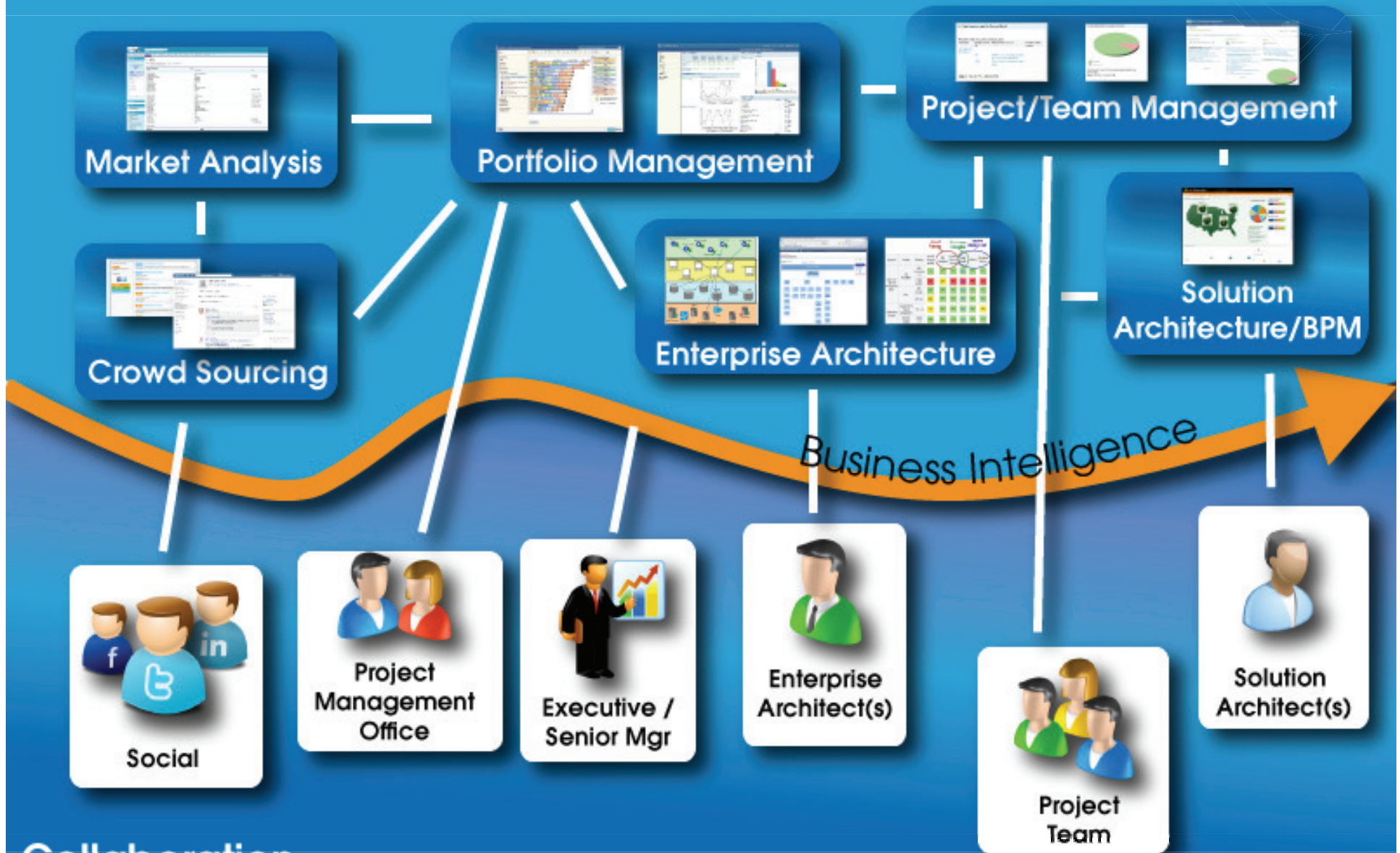Projects | Skills | People | Schedules | Resource

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Application/Technology Deployment

Harvesting/Socialization ⋯▶ Prioritization ⋯▶ Impact Analysis ⋯▶ Delivery

Market Analysis

Portfolio Management

Project/Team Management

Crowd Sourcing

Enterprise Architecture

Solution Architecture/BPM

Business Intelligence

Social

Project Management Office

Executive / Senior Mgr

Enterprise Architect(s)

Project Team

Solution Architect(s)

Collaboration

What is OSLC and Jazz

- OSLC (Open Services for Lifecycle Collaboration)
  - *A standards based initiative aimed at simplifying collaboration across the software delivery lifecycle*

- IBM® Rational® Jazz® is a new technology platform for collaborative software delivery
  - For global and distributed teams
    - Jazz is designed to transform how people work together to build software, making software delivery more collaborative, productive, and transparent
  - Extensible framework that dynamically integrates and synchronizes people, processes, and assets

What is Jazz?

www.jazz.net

Jazz is a **vision** for integrating work across the software lifecycle, and a **technology platform** designed to enable that vision

Innovation

major investment by IBM to create a scalable, extensible team collaboration platform

Evolution

Many Rational products will evolve to support the Jazz technology platform over time, bringing a host of next-generation capabilities to the Rational Software Delivery Platform.

jazz

Community

Jazz.net – an online venue for open commercial development of the Jazz platform and Jazz-based products.

Vision

Our vision for the future of software delivery -- supporting diverse types of teams and a workforce that is increasingly organizationally and globally distributed, fluid and dynamic.

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Jazz: The Simple Premise

Observation

The Internet and the web works quite well despite many types of information and a loose, distributed structure

- Standards define references (URLs), protocols, and how to represent standard information types such as pictures and movies
- Extensible via plug-ins such as PDF viewers

What if tool vendors defined standard ways to reference objects, standard protocols for accessing those objects, and standard ways to represent those objects in an extensible manner?

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Open Services for Lifecycle Collaboration
An initiative aimed at simplifying collaboration across the software delivery lifecycle

An open invitation to collaborate on a common integration architecture for software delivery

© Markus Angermeier@aperto.de

Open Services for Lifecycle Collaboration

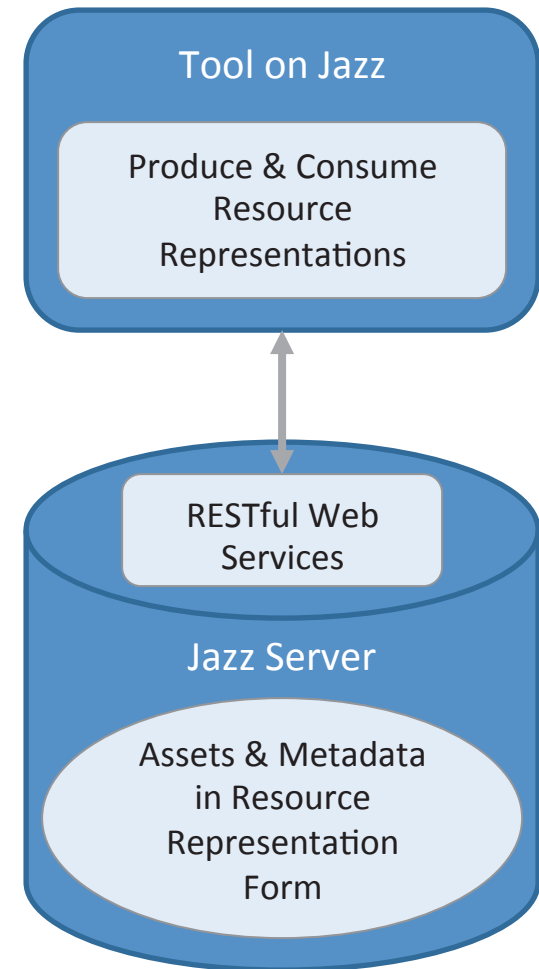Barriers to sharing resources and assets across the software lifecycle

- Multiple vendors, open source projects, and in-house tools
- Private vocabularies, formats and stores

▸ An architecture for sharing lifecycle resources
  - Described on Jazz.net through illustrative resource definitions, service implementations, and use cases
▸ Inspired by Internet architecture
  - Loosely coupled integration with "just enough" standardization
  - Common resource formats and services
▸ Innovation from the Jazz technology platform
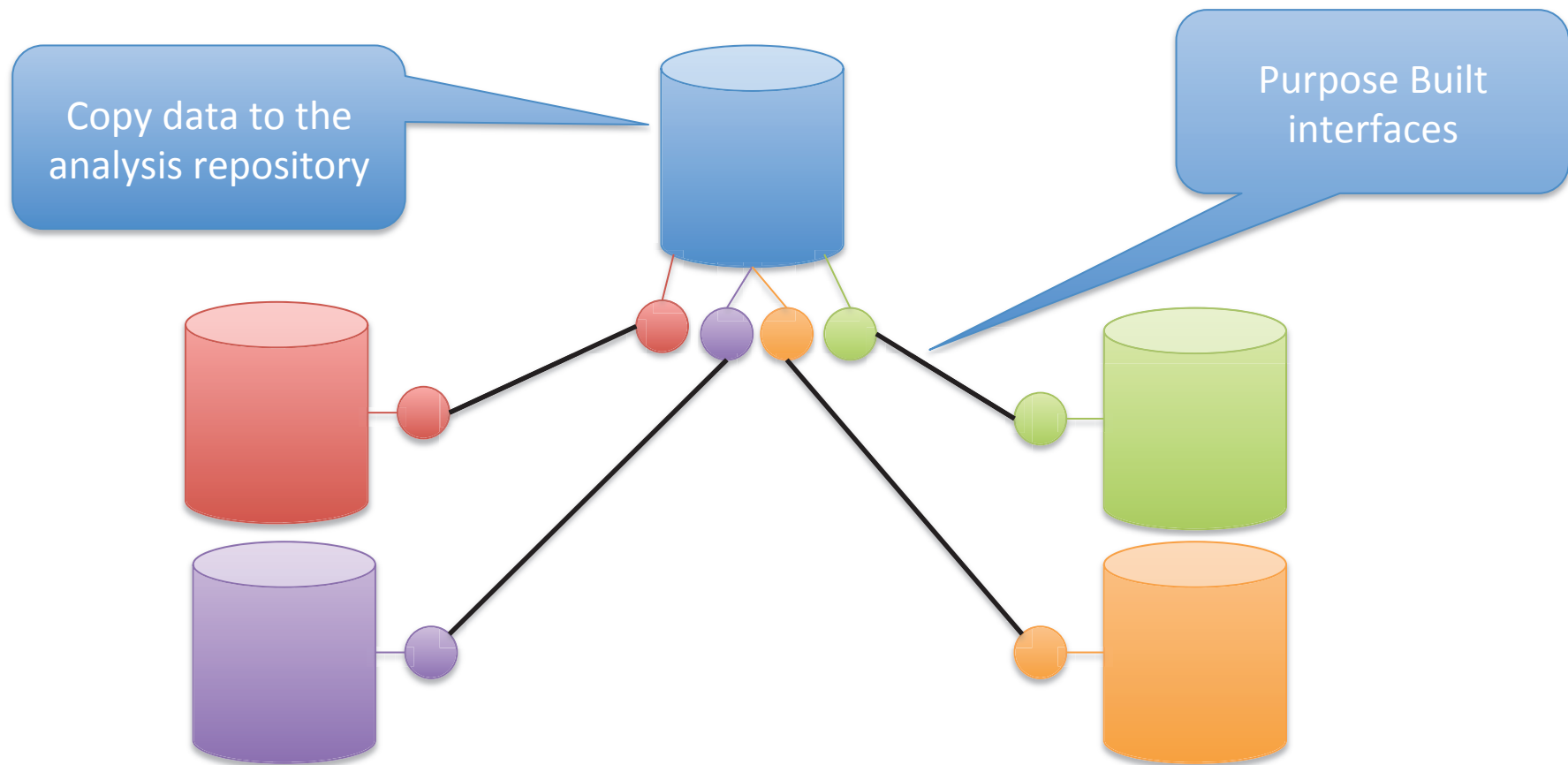
Jazz: Three Steps to Jazz Internet Architecture

1. **Simple URLs to reference *resources***
   - Whether a requirement, architecture building block, test case, or something else

2. **Shared resource formats**
   - Now that I can reference anything, what is it that I'm referencing?
   - *Resource representations* are agreed-upon ways to represent specific resource types in XML

3. **Shared resource services**
   - Standard ways to access and query resources with provisions for security such as access controls, all based on RESTful Web Services

***Representational state transfer (REST)** is a style of software architecture for distributed hypermedia systems such as the World Wide Web. (Wikipedia)*
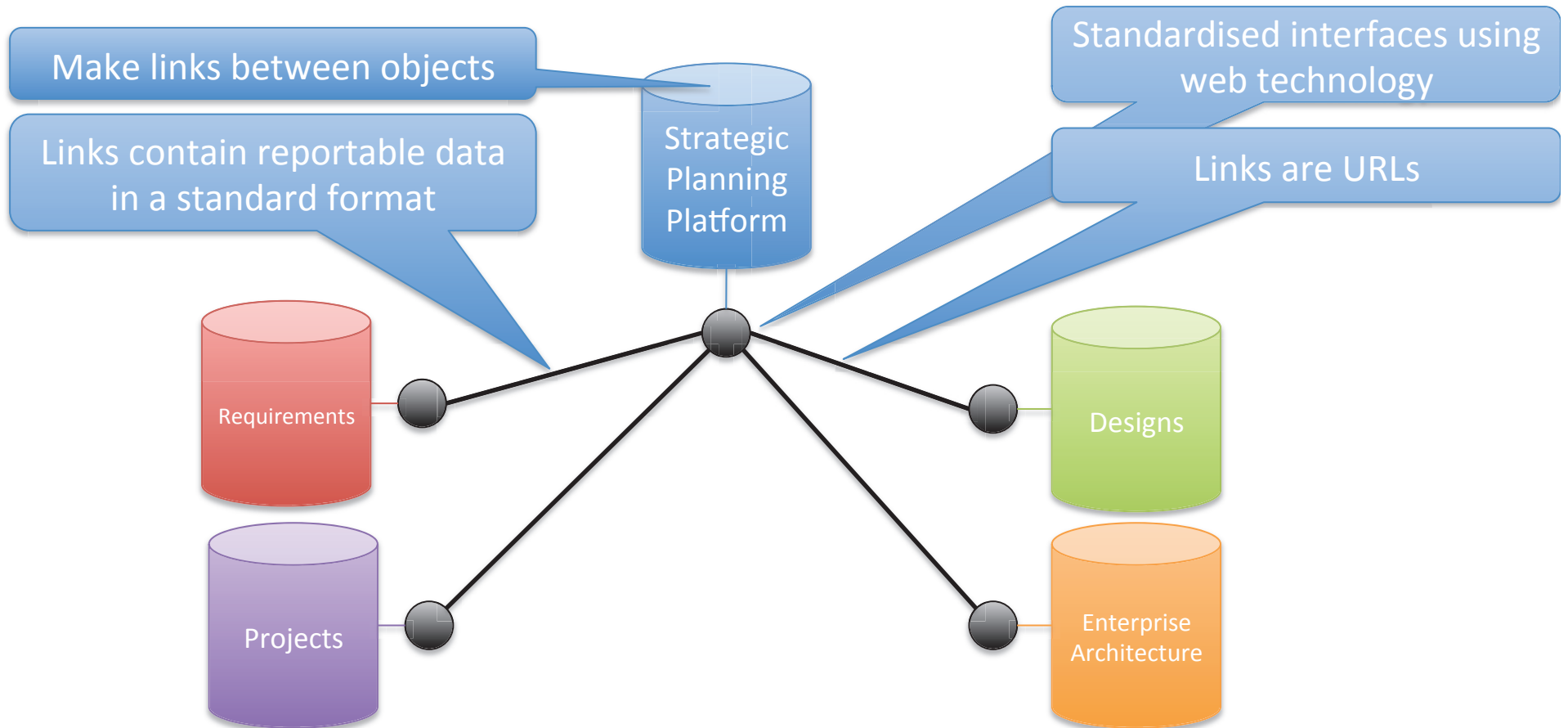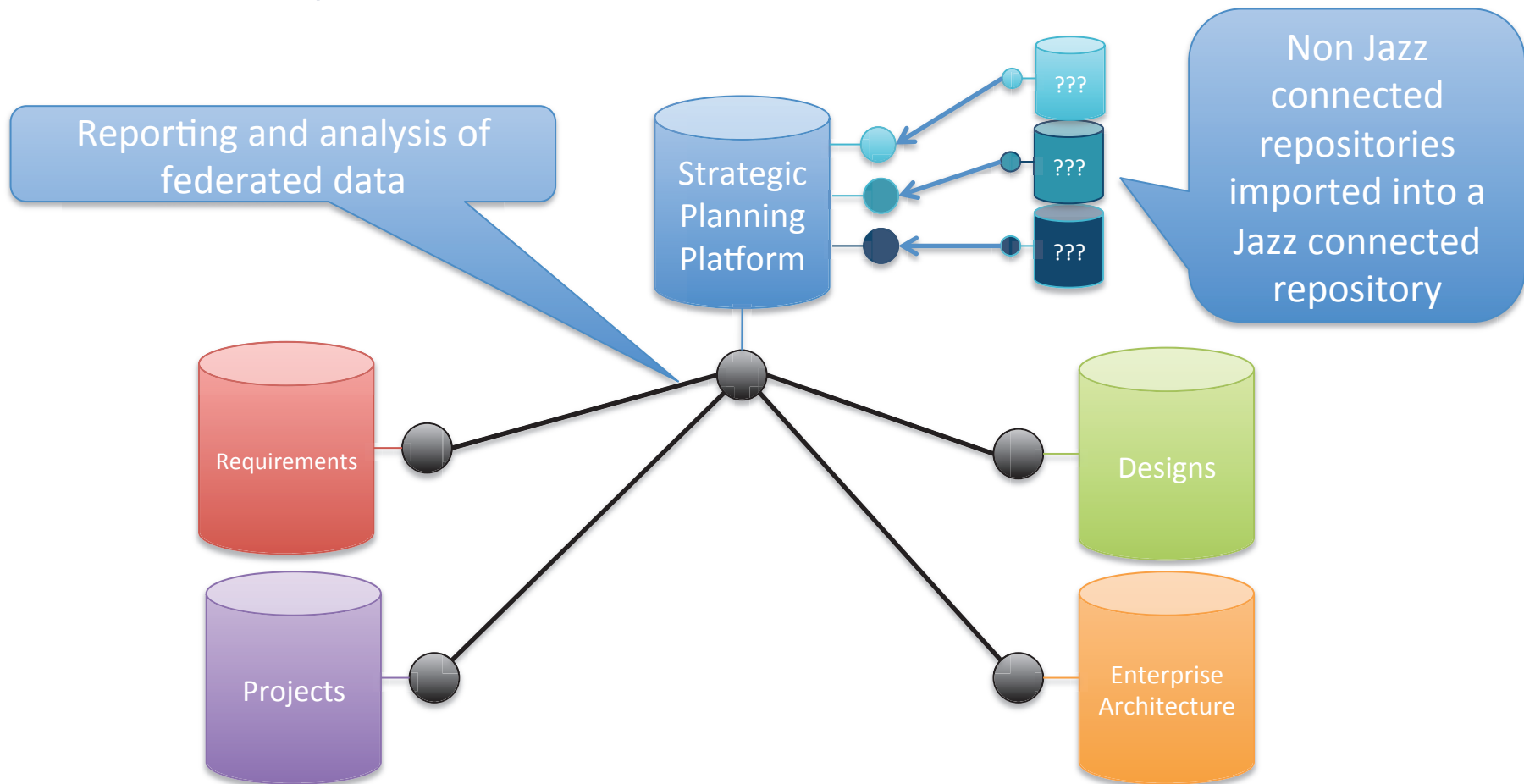
Tool on Jazz

Produce & Consume Resource Representations

RESTful Web Services

Jazz Server

Assets & Metadata in Resource Representation Form

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The Federated World

- ## In the old days…

Copy data to the analysis repository

Purpose Built interfaces

The Federated World

- ## In the new world of Jazz…

Make links between objects

Links contain reportable data in a standard format

Strategic Planning Platform

Standardised interfaces using web technology

Links are URLs

Requirements

Projects

Designs

Enterprise Architecture

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The Federated World

- Reality in the new world of Jazz…

Reporting and analysis of federated data

Strategic Planning Platform

Non Jazz connected repositories imported into a Jazz connected repository

???
???
???

Requirements

Designs

Projects
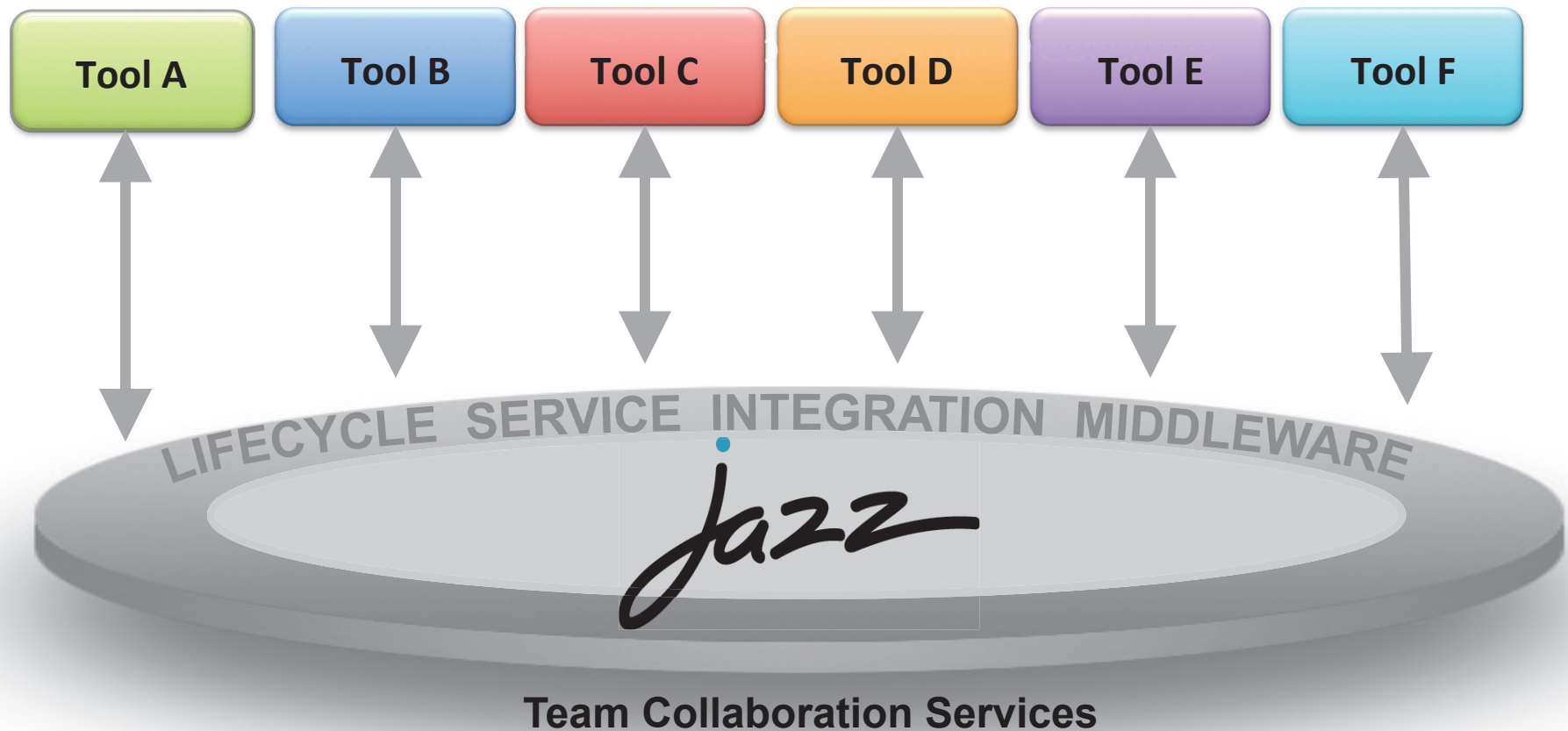
Enterprise Architecture
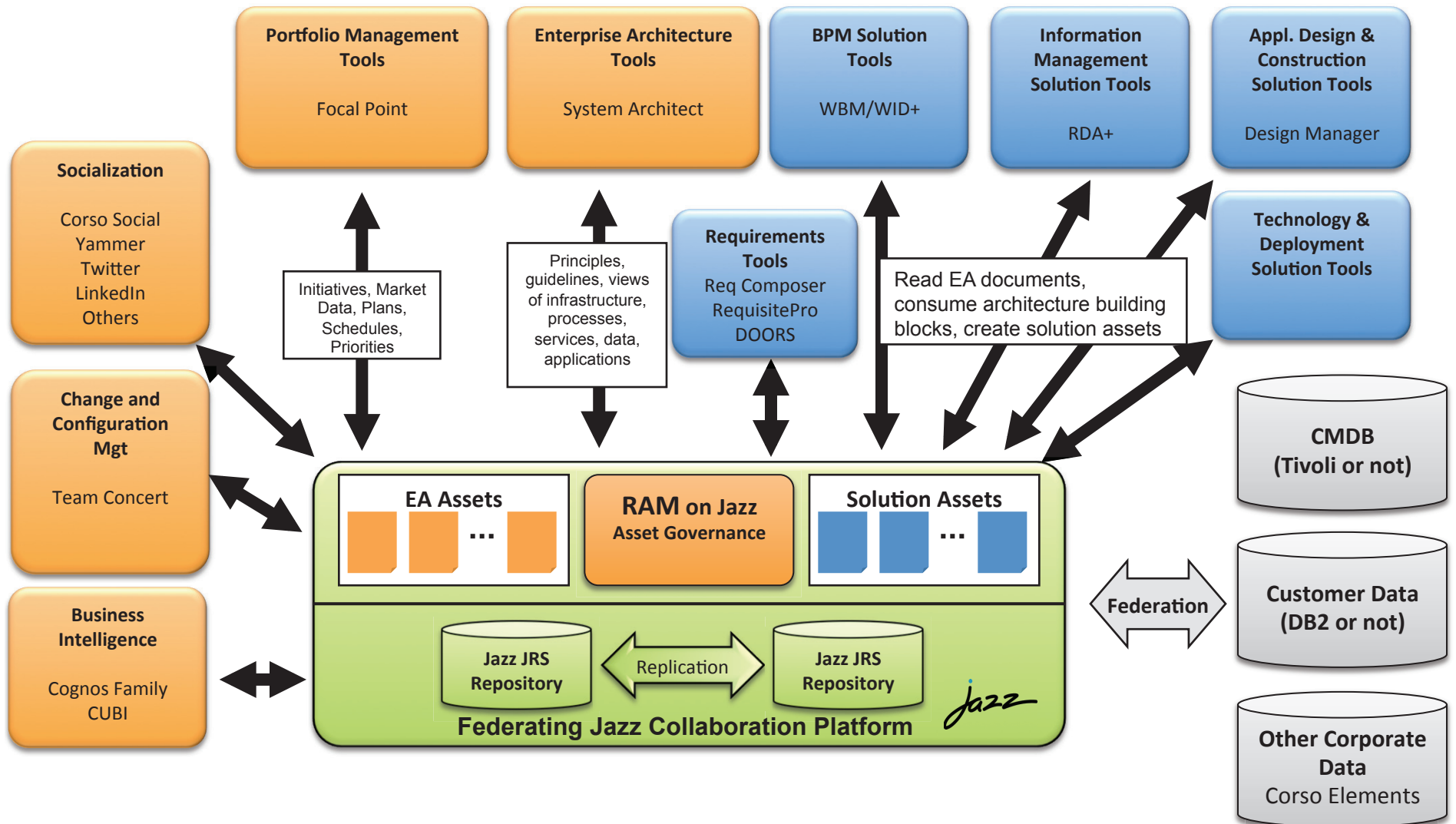
References in Jazz

All references are URLs, both intra- and inter-model. Traditional import and export of data for tool point-to-point integrations no longer necessary, greatly simplifying traceability and impact analysis and copied/duplicate data.
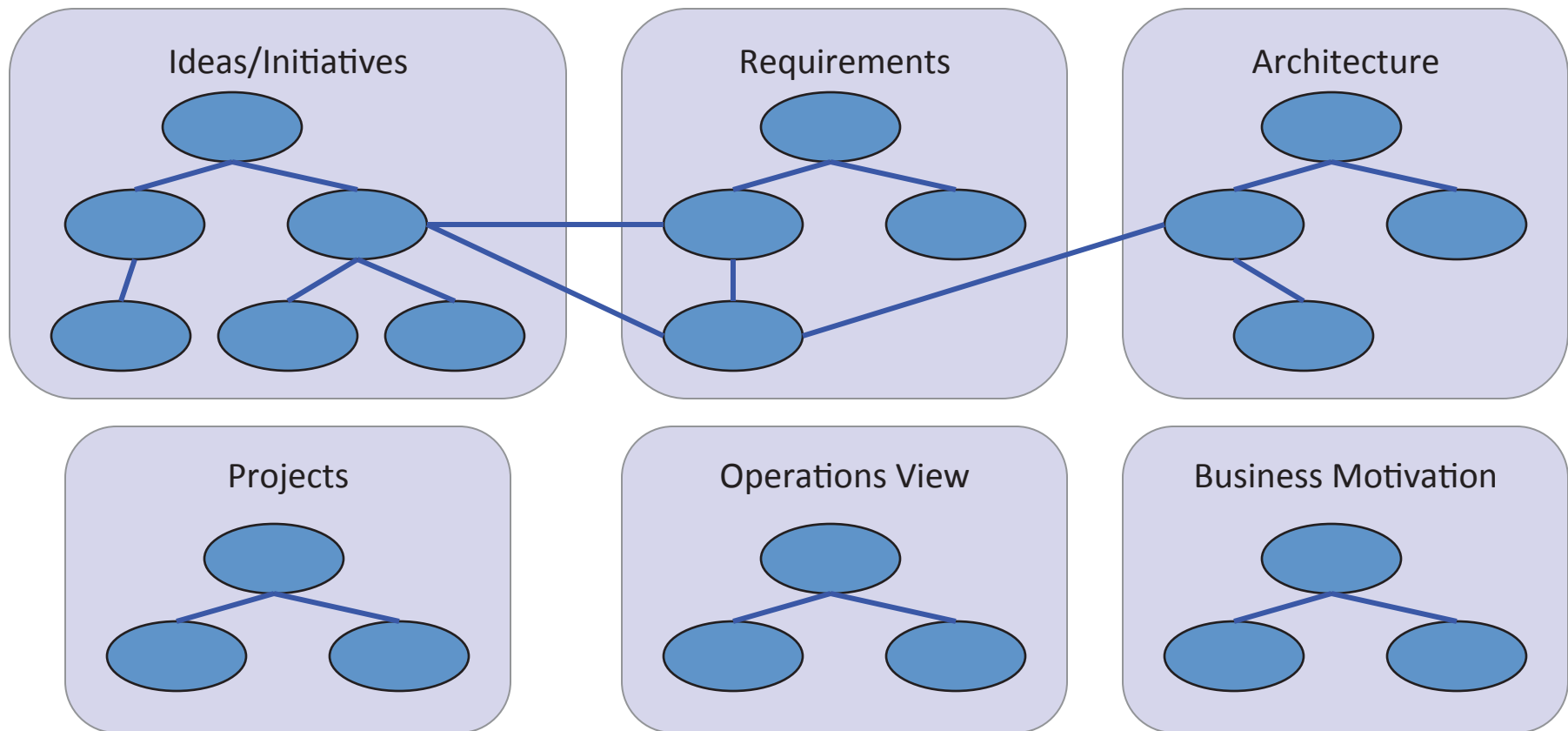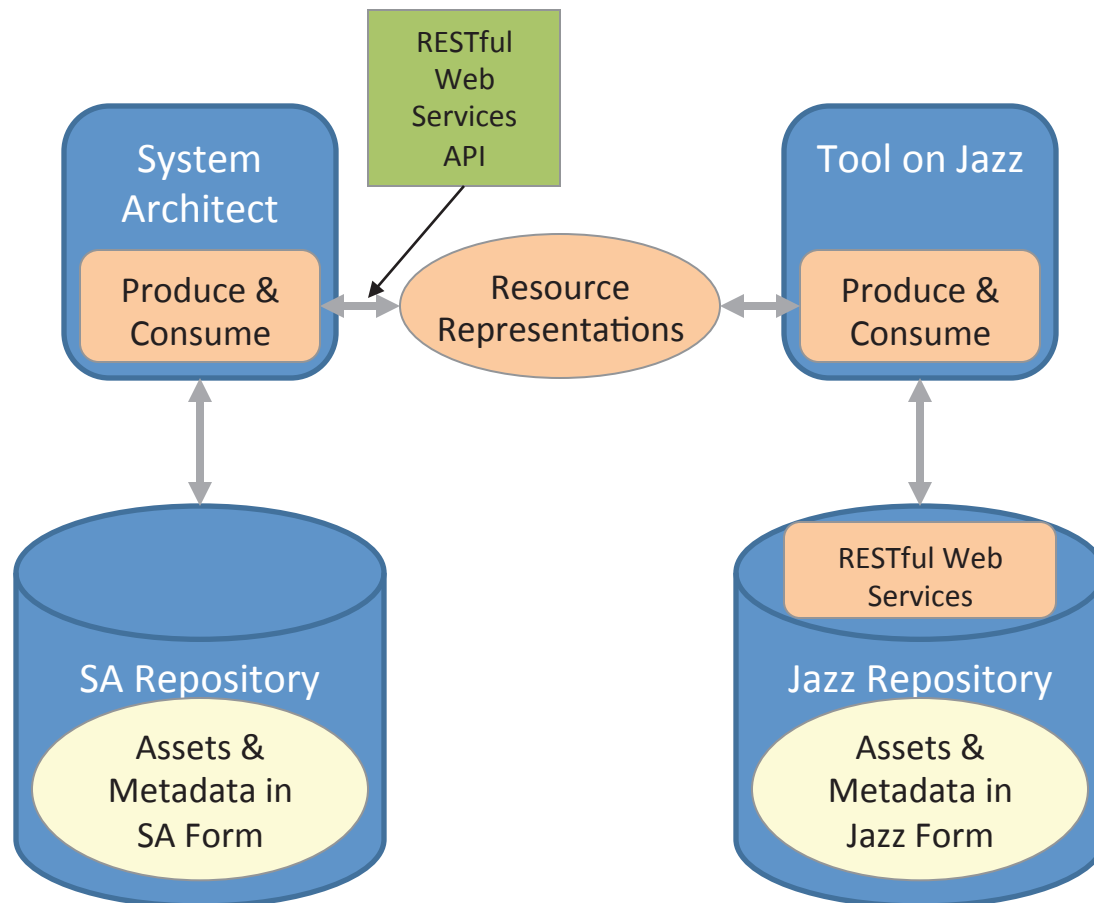
Tools collaboration based on

| Tool A | Tool B | Tool C | Tool D | Tool E | Tool F |

LIFECYCLE SERVICE INTEGRATION MIDDLEWARE

jazz

Team Collaboration Services

Strategic Planning Platform

Portfolio Management Tools

Focal Point

Enterprise Architecture Tools

System Architect

BPM Solution Tools

WBM/WID+

Information Management Solution Tools

RDA+

Appl. Design & Construction Solution Tools

Design Manager

Socialization

Corso Social
Yammer
Twitter
LinkedIn
Others

Requirements Tools
Req Composer
RequisitePro
DOORS

Technology & Deployment Solution Tools

Initiatives, Market Data, Plans, Schedules, Priorities

Principles, guidelines, views of infrastructure, processes, services, data, applications

Read EA documents, consume architecture building blocks, create solution assets

Change and Configuration Mgt

Team Concert

Business Intelligence

Cognos Family
CUBI

EA Assets

RAM on Jazz
Asset Governance

Solution Assets

CMDB (Tivoli or not)

Jazz JRS Repository

Replication

Jazz JRS Repository

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Federation

Customer Data (DB2 or not)

Federating Jazz Collaboration Platform

Other Corporate Data
Corso Elements

IBM Tools Centric View of SPP

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System Architect and Jazz: Interim Steps (an example)

- For some heritage tools, Jazz is a journey…
- SA must translate assets from its repository into resource representations
- SA presents a REST API for other tools to access
  - Other tool should be able to dereference a URL that resolves to an SA repository
  - The dereference is received by SA, which returns a resource representation for the referenced item

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How does jazz help strategic planning?

Desktop Integration → **Lifecycle Integration**

Eclipse established a desktop client integration model for individuals, Jazz establishes a similar integration model across the Corso strategic planning lifecycle

Function First → **Team First**

Jazz challenges us to think first about how people work together and then about the tool function needed by individual practitioners for specific roles

Manual → **Process Aware & Transparent**

Focuses on automating the unique dynamic of a team enhancing productivity by enabling real-time collaboration, visibility and transparency across the team, and process enactment

How does jazz help strategic planning?

- The strategic planning process requires
  - A number of roles using different products.
  - Information to be joined between products
- Jazz allows
  - User interface standards and mash up technologies to provide workbenchs for roles that are product independent.
  - Information to be joined

Collaboration with boundaries

Good user experience

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SPP – How it works

- Starts with an organization knowing what it has – often called an 'inventory' built through 'harvesting'

- Correlation of all three areas which requires a descriptive meta-model

- A standard graphical view of the architecture with a representation like ArchiMate

- Business intelligence to provide questions and answers

Upstream and Downstream Enterprise Architecture

UPSTREAM EA
Identifying viable projects to help realise the enterprise architecture

requires a good set of "**models**", capable of portraying the overall "as is" and "to be" architectural landscape

DOWNSTREAM EA
Ensuring projects can exploit the architecture's "standard components" or building blocks

requires each **part to be described and published** in an easy-to-use, easy-to-find "catalogue like" format

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Evolving to a Strategic Planning Platform

- **Harvest**

- **Intelligence**

- **Prioritise**

- **Survey**

- **Option Comparison**

- **Transition Planning**

- **Viewpoints**

SPP

- Effectively Manage new initiatives and change
- Deliver a systematic approach to manage change
- Align systems with capabilities
- Engage all stakeholders
- Co-ordinate different lifecycles and tribes
    - E.g. defines the 'what' and 'why' of solutions rather than the 'how' and 'who' of ALM
- Utilise new technology trends
    - Mobile
    - Jazz
    - Business Intelligence
    - Federated data sources
- Based upon IBM technology but allows integration with other

Strategic Planning Platform

1. Analyze current position
   - What capabilities do you have?
   - How effective are they?
   - Where can you improve?

2. Compare future strategies
   - What are the benefits?
   - What is the likelihood of success?
   - How much investment is required?

3. Govern the transition
   - Work within constraints
   - Optimize roadmap
   - Delegate and track initiatives
   - Manage persistent value

Environment
- Customers
- Competitors
- Conditions/Climate
- Regulation
- Products/Services
- Requirements

Capability
- Processes
- Organization
- Locations
- Data
- Applications
- Technology

Delivery
- Projects
- Skills
- People
- Schedules
- Resource

- Harvesting
- Business intelligence
- Prioritization
- Surveying
- Option Comparison
- Transition Planning
- Viewpoi...

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SPP – Ideas to Delivery

Everyone

IT / System Centric

Ideas

Initiatives

Information

Goals

Objectives

MARKET

Customers | Competitors | Conditions/Climate | Regulation | Products/Services

Processes

CAPABILITY

DELIVERY

Resource

Organization | Locations | Data | Applications | Technology

Projects | Skills | People | Schedules

Program Evaluation Board

Prioritized Project Portfolio

Requirments (NF)

Dates

Cost

Resources

Risk

Priority

Dependencies

User

SPP

Like to Do

Should Do

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SPP - Capability

Anyone can produce a Request for Change (RFC)

RFC

Target State

Discover δ Collect & Categorize
- Ideas
- Products/Services
- Regulations
- Competitors
- Economic Landscape
- Goals
- Objectives
- Strategic Intent (Business)
- Initiatives
- Guiding Principles
- Standards
- Best Practices

Categorized RFC

Triage & Prioritize
- Define Prioritization Criteria
- Review
- Reject
- Accept
- Group
- Prioritize
- Business Value Analysis

RFC History

Attitude to Risk

Initiative

Assess Impact
- Examine Initiative
- Group Initiatives
- Assess against EA
- Produce Target States (TS)
- Produce Transition Plan for each TS
- Product Solution Alternatives (SA)
- Document SA
- Build Business Proposal (BP)

Business Proposal

Define Portfolio
- Examine BP
- Review SAs vs. Project Portfolio
- Make Informed Business Decision
- Business Value vs. Cost
  - Prioritize SAs
  - Select SA
  - Prioritize BP
  - Select BP
- Define Projects
- Prioritize Projects

Project

Harvest
- EA/SPP
- Project Portfolio
- Customers

Enterprise Arch. Team
Program Evaluation Board

Program Evaluation Board

Enterprise Arch. Team

Program Evaluation Board

Innovator Analysis – Who thought of what and its Business Value

SPP - Products

Focal Point — RFC

Rypple — RFC Goal

Yammer — RFC Ideas

Google — RFC

Salesforce — RFC Customer Data

Focal Point
- Initiatives
- RFCs

Analysis, Prioritization, Set Criteria

System Architect — Business Proposal

Solution Alternatives, Map Initiatives to Architecture, Business Proposal, Use Archimate

Focal Point — Project Schedule

RTC — Delivery

Cubi/BI

RFC Status by User
RFC Status by Category
Top 10 RFCs by Priority
Top 10 Customers by RFC
Top 10 RFCs by …..

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SPP Examples

- Change management across SPP

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Creating a Change Request

Review Change Requests

Modeler reviews task list → Review task in CCM → Review linked items in SA → Perform changes against CR → Task complete

CCM Task

SA Explorer

5: Order Process is Wrong(Defect)
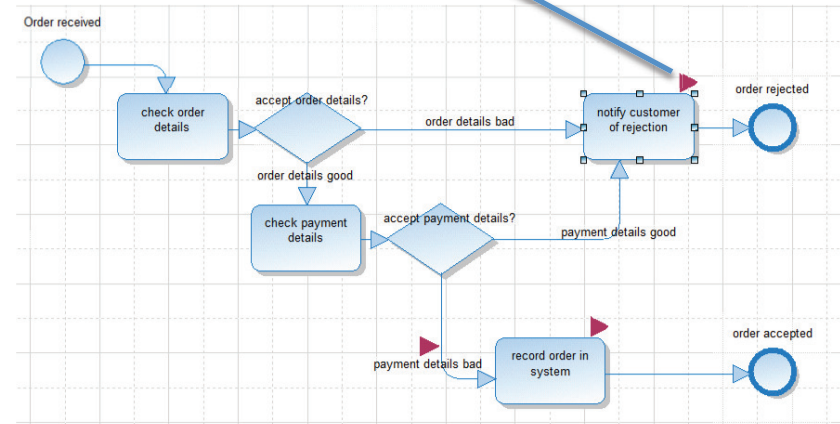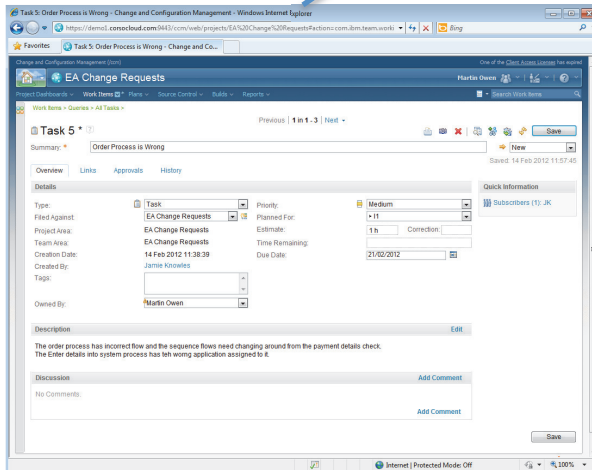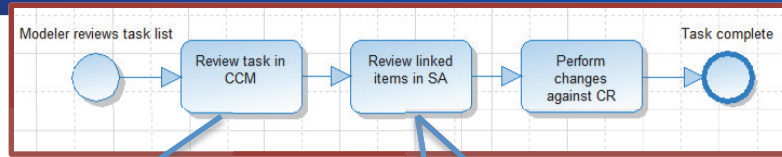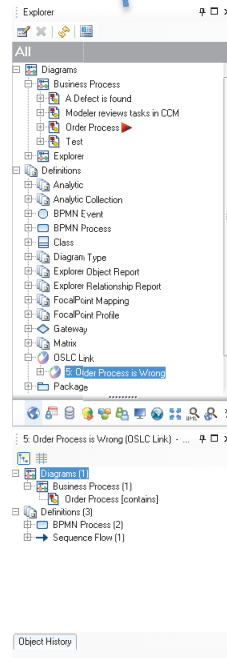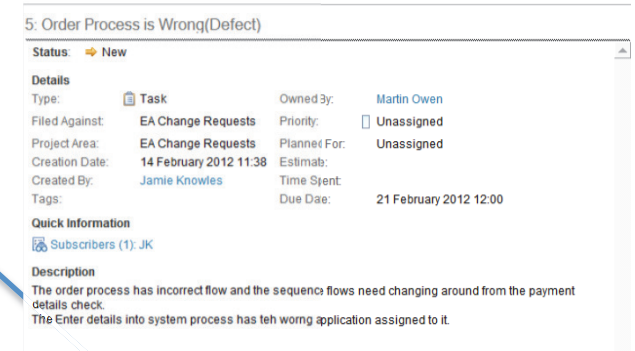
Rich Hover Over Link icon

SA Explorer Diagram

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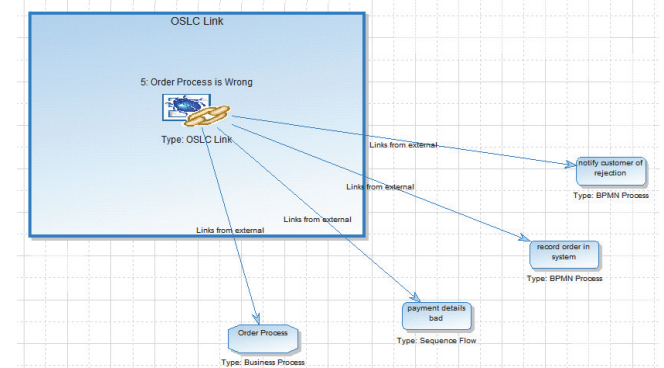
Log Changes against CR
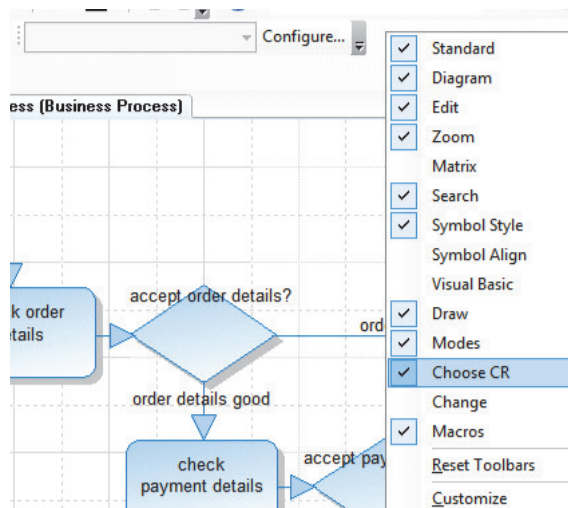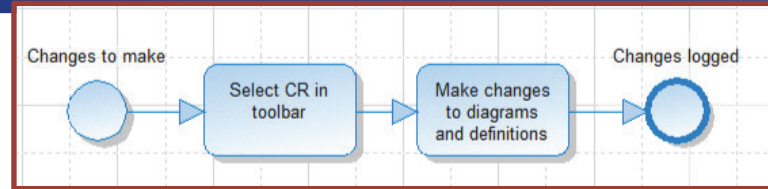
New SA Toolbar

Model updated as usual

Object history shows all changes and which CR they are made against

Link Items to SA artifacts from CCM
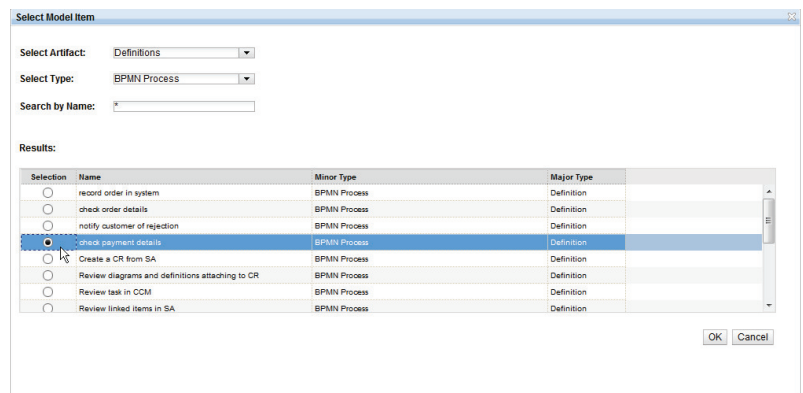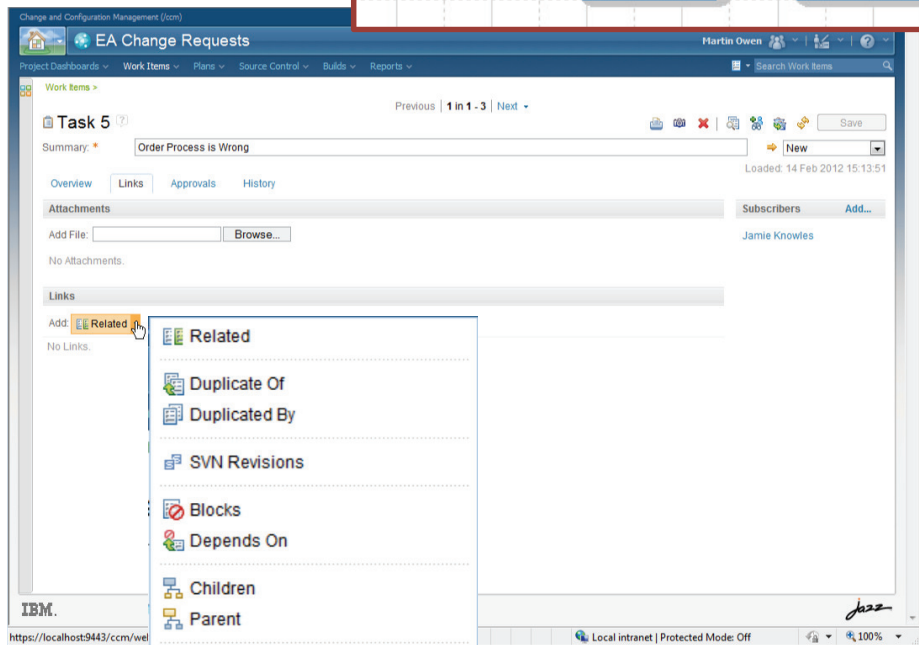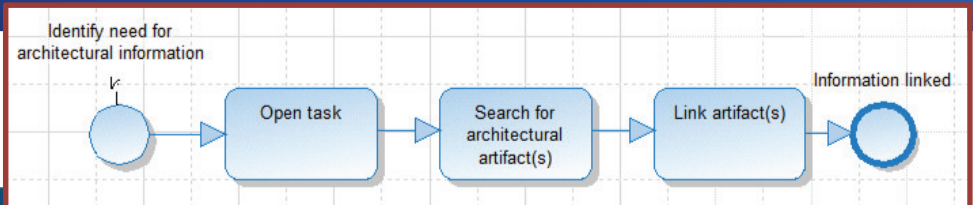
Select SA objects to link to CCM Task
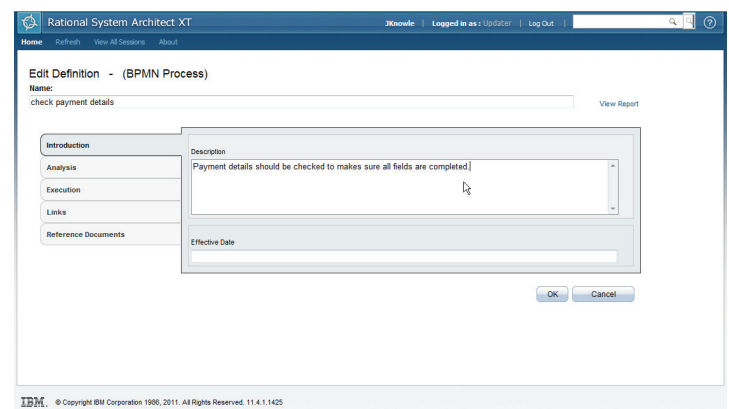
CCM tasks have a links tab

Linked objects can be opened in SA XT

Benefits for Strategic Planning

- Tools become capabilities on SPP

- Tool integrations can be configured quickly and easily including SW upgrades

- Different tools can be used in the portfolio that are already used by customers

- Supports internet paradigm and therefore suitable for cloud

- Saves cost where tools are available on a SaaS basis

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Corso Strategic Planning Platform

- Available on a rental or perpetual license basis

- On premise or public cloud

- Preconfigured framework for SPP

- Can use individual components or complete SPP framework

- For more information or to evaluate:

www.corso3.com

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