HOPEX Business Architecture

User Guide

HOPEX V2R1

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INTRODUCTION

HOPEX Business Architecture is based on tools offered by the **HOPEX** platform to support business transformation on the basis of the analysis of business capabilities and the enterprise model.

Business Architecture helps managers define the operating architecture of their enterprise to remain in compliance with its business model and to adapt to changes in the enterprise and in its economic and regulatory environment. **HOPEX Business Architecture** is thus a key tool for enterprise transformation.

The method offered by **HOPEX Business Architecture** is used to take into account the enterprise strategy: from driver analysis to the definition of objectives and action resources. **HOPEX Business Architecture** also constitutes an analysis solution for enterprise business capabilities to ensure the services it plans to provide.

Last but not least, **HOPEX Business Architecture** is combined with other **HOPEX** solutions dedicated to the enterprise architecture used to define organizational, application or infrastructure building blocks.

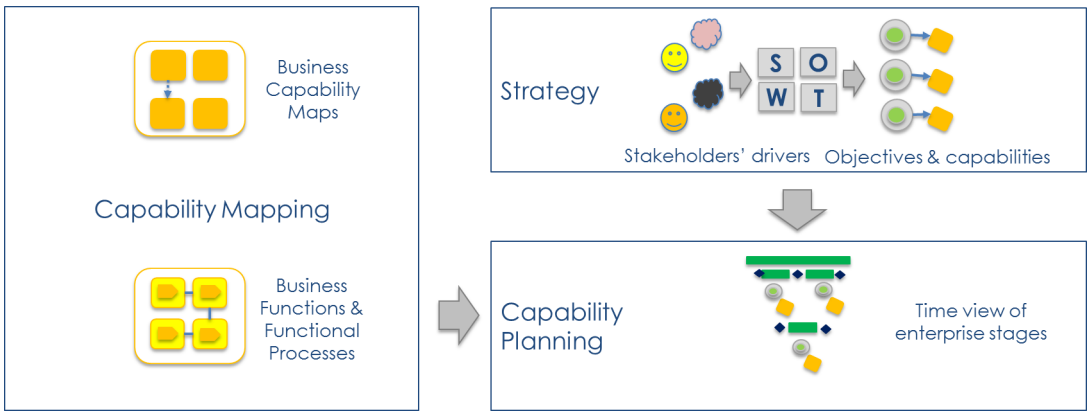
PRESENTATION OF HOPEX BUSINESS ARCHITECTURE

Combined with the products of **HOPEX** suite, **HOPEX Business Architecture** supports a methodology and the tools used to describe and plan your business transformation.

The scope covered by HOPEX Business Architecture

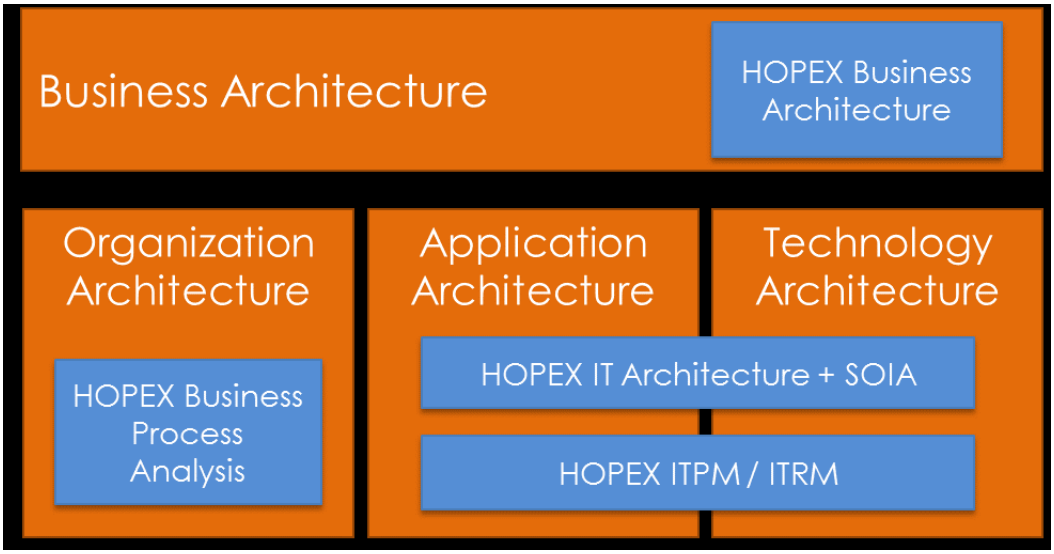
Stages proposed as standard follow a top-down approach, beginning with a review of the business capabilities of the enterprise and its strategy, and ending with a precise definition of enterprise transformation stages.

At each of these phases, standard reports are proposed to simplify analysis of the subject and assist in decision-making.



Positioning of the HOPEX Business Architecture solution

HOPEX Business Architecture can be used with other products in the **HOPEX** suite.



HOPEX Business Process Analysis

The **HOPEX Business Process Analysis** solution provides **HOPEX Business Architecture** with:

- The description of organizations that implement the business functions and/or the business function capabilities identified in **HOPEX Business Architecture**;
- The description of organizational processes that implements the value streams identified in **HOPEX Business Architecture**.

HOPEX IT Architecture

The **HOPEX IT Strategy** option of the **HOPEX IT Architecture** solution is based on **HOPEX Business Architecture** to describe that business capabilities, functionalities or business functions are implemented by resource architectures or application systems and applications.

HOPEX IT Portfolio Management

The **HOPEX IT Portfolio Management** solution provides **HOPEX Business Architecture** with the possibility to define whether the business capabilities are implemented by the applications. Both solutions share the mapping functionality for business capabilities.

HOPEX Risk Mapper

The **HOPEX Risk Mapper** solution provides **HOPEX Business Architecture** with the possibility to associate risks with business functions and value streams.

HOPEX Business ArchitectureProfiles

In **HOPEX Business Architecture**, there are two default profiles with which rights and accesses are associated. These profiles are:

- **Business Architect**;
- **Strategic Planning Functional Administrator**.

Business Architect

The business architect is the business user profile of the **HOPEX Business Architecture** solution.

The business architect is responsible for creation and structuring data relating to Business Architecture.

If your license allows, and so that the users connected to this profile can integrate their work, the business architect can also access the objects and main functionalities of the **HOPEX Business Process Analysis**, **HOPEX IT Architecture**, **HOPEX IT Portfolio Management** and **HOPEX Risk Mapper** solutions via the **HOPEX Business Architecture** desktop.

☛ *For more details on the business architect desktop, see "Presenting the business function architecture desktop", page 20.*

Strategic Planning Functional Administrator

The functional administrator has extended rights on all managed objects. The functional administrator is also in charge of the work organization of business architects.

- The functional administrator manages the creation of users and their assignment to profiles;
- The functional administrator creates enterprises and identifies the **HOPEX** repository objects that are part of the scope;
- The functional administrator allocates users to one of the enterprises by defining the **Working Environments** that constitute the entry points of the **HOPEX Business Architecture** desktop;
- The functional administrator creates, for example, the "Existing (As-Is)" and "Target (To-Be)" enterprise transformation stages that are used to start the enterprise transformation roadmap;
- This specifies the participants in the enterprise as well as the role of each;
- The functional administrator defines the EA organizations (governance bodies) to which the various participants can be affiliated, used to allow the identification of the stakeholders of the business transformation program.

☛ *For more details on the functional administrator desktop, see "Presenting the Strategic Planning functional administrator desktop", page 21.*

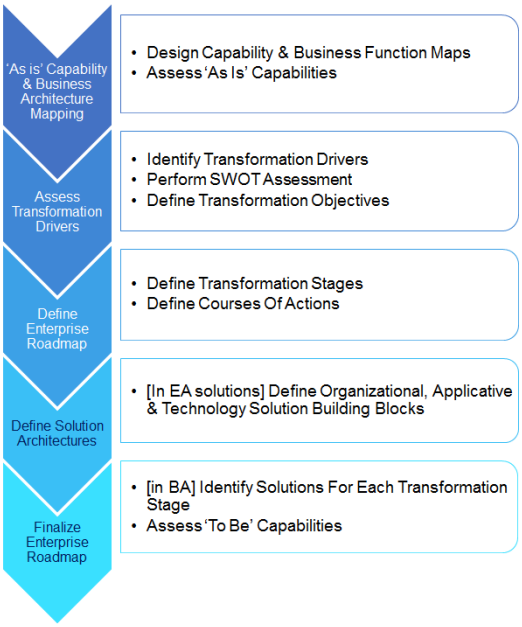
Business Roles of HOPEX Business Architecture

In **HOPEX Business Architecture**, there are, by default, business roles that can be assigned to certain users. These roles are:

- **Driver owner**, used to identify the owner of an identified driver,
- **Concerned Stakeholder**, used to associate a person or a governance body to different objects identified in the solution (e.g.: driver, business capability, business function, etc.).

THE HOPEX BUSINESS ARCHITECTURE METHOD

The method described in this guide is represented in the schema below.



Description of business capabilities and the existing architecture: this first step consists, on the one hand, in defining what the enterprise can deliver (business capabilities), and on the other hand, in defining how it can be structured to deliver this (business functional area). For a business capability, you can identify the KPI dimensions of interest for the capability which are used to assess business value and performance (e.g.: for a delivery capability, we are interested in the "delivery time" expressed in minutes).

☛ *For more details on business capabilities, see "Building capability maps and business function architectures", page 7.*

Assessing the transformation drivers: this second step is based on gathering and assessing (SWOT) drivers. The enterprise goals are then deduced from this step.

☛ *For more details on transformation drivers, see "Identifying enterprise goals", page 13.*

this third step is based on the description of the operational systems of the enterprise, performed during the first step as well on the transformation driver analysis, to schedule the changes foreseen to reach the enterprise goals and thus define the courses of action (strategies and tactics) to be implemented with a view to achieving the defined goals and specify the *exhibited business capabilities* for each enterprise stage.

For a given *exhibited business capability*, in a given stage, you can define the key performance indicator (KPI) that is used to define the expected service level requirement, when implementing the capability for the enterprise transformation stage in question (e.g.: for a for a "product delivery" business capability, we expect, for the 'delivery time' KPI dimension, a "delivery time < 30 minutes"

in a first enterprise transformation stage, then a "delivery time < 20 minutes" in a later enterprise stage).

> ☛ *For more details on the road map, see "Defining the transformation roadmap", page 17.*

Defining the solution architectures: this fourth step can be performed by using **HOPEX Business Architecture** and the Enterprise Architecture solutions jointly; it is used to identify and describe the existing and target solution building blocks and to identify which business capabilities (or business functions) they contribute to implement.

The additional solutions of the **HOPEX** platform are used to describe in more detail your target organizational models (organizational, application and technological solution building blocks).

> ☛ *For more details on solution architectures, see "Describing implementation of an enterprise stage", page 84.*

Finalizing the driver roadmap: this last step aims to finalize the transformation roadmap, in association with each solution environment required to achieve the enterprise goals.

> ☛ *The order of these steps is given by way of information. To define a finalized transformation roadmap, several iterations of this cycle should be performed.*

```
This presentation is based on the example of a pizza making and delivery
company that has decided to reorganize itself to ensure pizza delivery
and improve product quality.
```

Building capability maps and business function architectures

The goal of this step, on a strategic level, is to check the suitability between the *business capabilities* of the enterprise, the *business functions* delivering this capabilities as well as the required functionalities or business skills.

This consists of the following tasks:

- "Describing the existing architecture of business capabilities", page 7,
- "Describing business functional area elements", page 10,
- "Describing business capability implementation by the business functions", page 12.

Describing the existing architecture of business capabilities

Building the business capability map

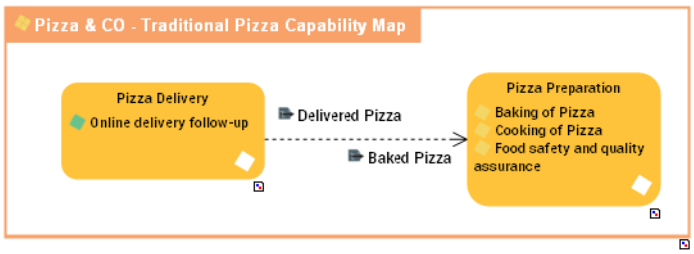
A business capability map describes what the enterprise is capable of producing for its internal needs or for meeting the needs of its clients.

> 🕮 *A business capability map is a set of business capabilities with their dependencies that, together, define a framework for an enterprise stage.*

> 🕮 *.A business capability is a set of features that can be made available by a system (an enterprise or an automated system).*

The capability map thus presents the business capabilities of the highest level for one of the stages of the enterprise.

In this example, the business capability to deliver pizzas is based on the business capability to cook them.



☛ *For more details on business capacity map diagrams, see "Creating a business capability map diagram", page 31.*

Defining the performance indicators for business capabilities

The main business capabilities are assessed with respect to different criteria represented or dimensions (KPI dimension).

For example, the competitiveness of a delivery capability is measured according to a 'delivery time at target cost'.

These dimensions give rise, for a given enterprise stage, to key performance indicators or KPIs.

For example, a delivery capability can have a target of 'delivery time in less than 25 minutes for a cost price less than 10% of the sales price' within the framework of a given enterprise stage.

📖 *A composite KPI defines the grouping of elementary KPIs that should be examined together in order to appreciate the performance of an item with KPI. E.g.: a delivery must take place in less than 20 minutes and cost less than 5 euros.*

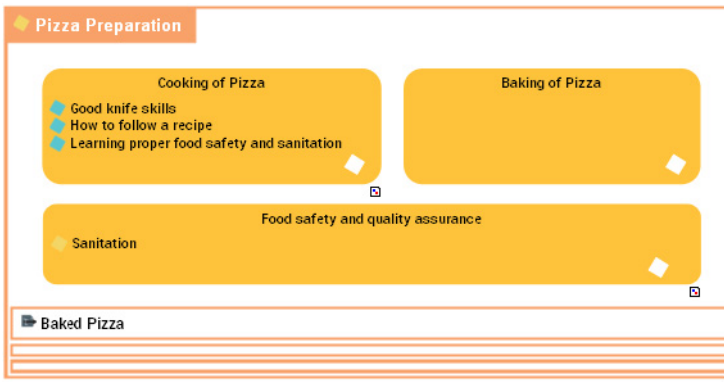
☛ *For more details on KPIs, see "Using KPIs", page 59.*

Describing the business capability breakdown

Business capabilities are then described more precisely to identify:

- a more detailed granularity capability breakdown;
- the expected effects of the capability;
- the business skills or functionalities required for each of them;
- the dependencies between capabilities (expected effect of one dependent from the result of the other).

For example, the business capability that consists of preparing pizzas is broken down into a number of business capabilities: "cook the pizzas", "Use the oven".



HOPEX Business Architecture provides a report available detailing the breakdown of capabilities.

☛ *For more details on breakdown maps, see "Breakdown map of business capabilities", page 96.*

Defining the business skills and functionalities associated with business capabilities

To be able to then check that each business capability is correctly implemented by suitable solution building block, you must define the required business skills and functionalities.

For example, the "Cook pizzas" business capability requires skills to "Make pizza dough".

📖 *A functionality is a capability expected from an equipment item (hardware or software) to ensure the operation of a business function or an organization. If it is a software functionality, it can be provided by an application.*

☛ *For more details on skills and the business capability functionalities, see "Defining the business skills and functionalities associated with business capabilities", page 36.*

Describing business functional area elements

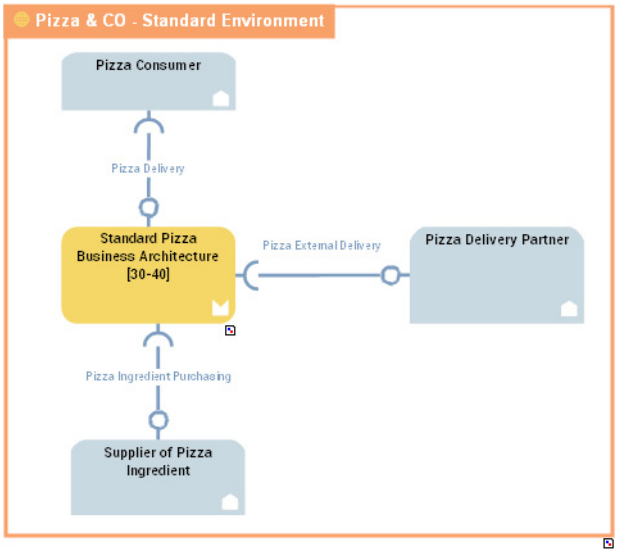
Describing a business architecture environment

A business architecture environment represents the relationships of a business functional area with its partners.

In this example, the business function architecture environment of the pizza-making company is made up of the historical business function architecture and its interactions with external partners: clients and suppliers. You can see in the diagram that delivery is outsourced to a third party deliver partner.

An application technical architecture describes one of the configurations possible for application deployment. It describes how the different technical areas of the application are connected to each other and the technologies and the communication protocols that they use. An application can have a number of possible technical architectures (E.g.: autonomous installation, horizontal or vertical deployment, etc.)

A business partner designates a third-party who is in relation with the enterprise within the framework of a given business architecture environment. Examples: private sector client, regulatory organization, supplier.



Communications between the objects are represented by interactions.

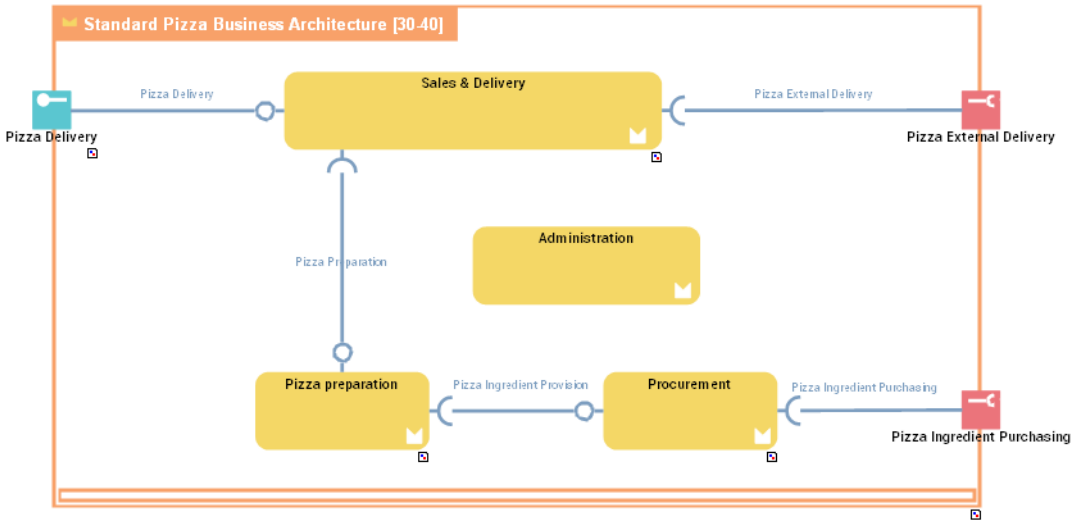
An interaction represents a contract established in a specific context between autonomous entities that are internal or external to an enterprise. These entities can be enterprise org-units, applications, activities or processes, as well as external org-units. The content of this contract is described by an exchange contract.

Describing a business functional area

An application technical architecture describes one of the configurations possible for application deployment. It describes how the different technical areas of the application are connected to each other and the technologies and the communication protocols that

they use. An application can have a number of possible technical architectures (E.g.: autonomous installation, horizontal or vertical deployment, etc.)

In this example, the "Pizza making" history functional area is based on the business functional areas for selling, delivering and preparing pizzas.



Defining the business skills and functionalities associated with business functions

To be able to subsequently check that each business capability is implemented by a suitable business function, you must define the required business skills and functionalities, for each business function.

📖 *A functionality is a capability expected from an equipment item (hardware or software) to ensure the operation of a business function or an organization. If it is a software functionality, it can be provided by an application.*

☛ *For more details on skills and the business capability functionalities, see "Defining the business skills and functionalities associated with business capabilities", page 36.*

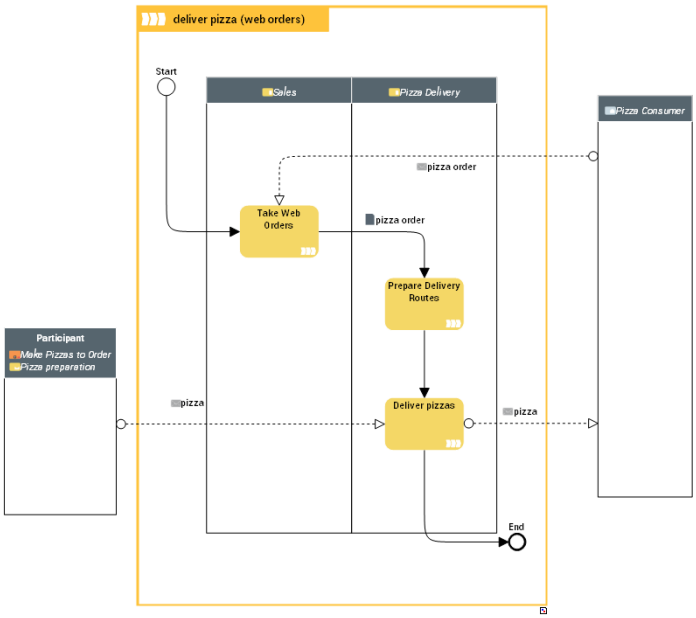
Describing value streams

A given business functional area runs one or more processes to provide the services expected within the framework of their interactions with other business functions or business partners.

A *value stream* is represented by a sequencing of *value creation steps* managed by the business functions of the architecture.

📖 *A value stream is an end-to-end collection of Value Stages that creates an outcome for a customer, who may be the ultimate customer or an internal end-user of the value stream.*

📖 *A value stage is a distinct, identifiable phase or step within a value stream that has a unique entrance criteria, exit criteria, and identifiable participating business function or business functional area.*



☛ *For more details on value streams, see "Describing value streams", page 54.*

Describing business capability implementation by the business functions

This involves connecting the *business capability*, which corresponds to what we know how to do or what we want to do and which represents the *goal* to be achieved, to a way of achieving what is represented by a *business function* or a *business functional area* at a conceptual level, that is, upstream of organizational and technical choices.

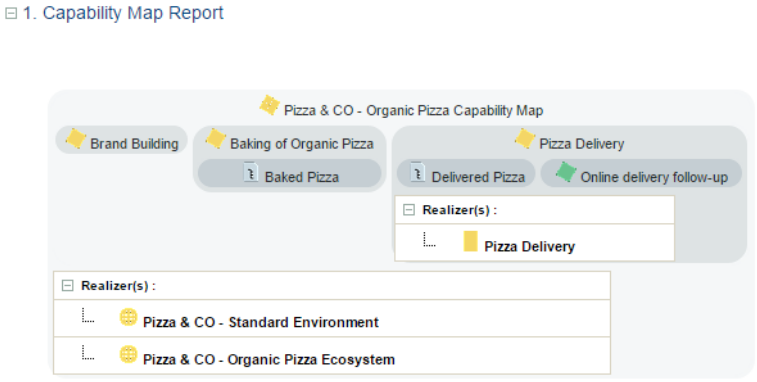
> 🕮 *An application technical architecture describes one of the configurations possible for application deployment. It describes how the different technical areas of the application are connected to each other and the technologies and the communication protocols that they use. An application can have a number of possible technical architectures (E.g.: autonomous installation, horizontal or vertical deployment, etc.)*

This business functional area will itself carry the value processes whose steps will require its business function components.

Construction of the *business capability map* on the one hand and the *business architecture environment* on the other hand is used to check that the business capabilities are implemented by the business functions.

> ☛ *For more details on the businesses associated with business capabilities, see "Describing component implementation", page 57.*

HOPEX Business Architecture provides a report that presents the result of the implementation of business capabilities by business functions.



Example of business architecture breakdown report

☛ *For more details on the breakdown of business capabilities, see "Breakdown map of business capabilities", page 96.*

Identifying enterprise goals

After having described the current state and analyzing the suitability between the business capabilities of the enterprise and its business functions, this step consists in drawing up the list of needs for change (or driver) identified at the various levels by the stakeholders (or interested parties), and assessing them in order to establish the list of enterprise goals.

🕮 *A transformation objective is the expression of a realistic target, measurable and with a time limit, which the enterprise pursues to reach the goals it has set.*

☛ *For more details on strategic elements, see "Defining the transformation strategic elements", page 72.*

Identifying drivers

Stakeholders identify drivers.

🕮 *A stakeholder is an internal or external person or person group with a defined role in the enterprise.*

There are various types of drivers:

🕮 *A business driver is an expectation expressed by a client, a partner or provider with respect to the enterprise.*

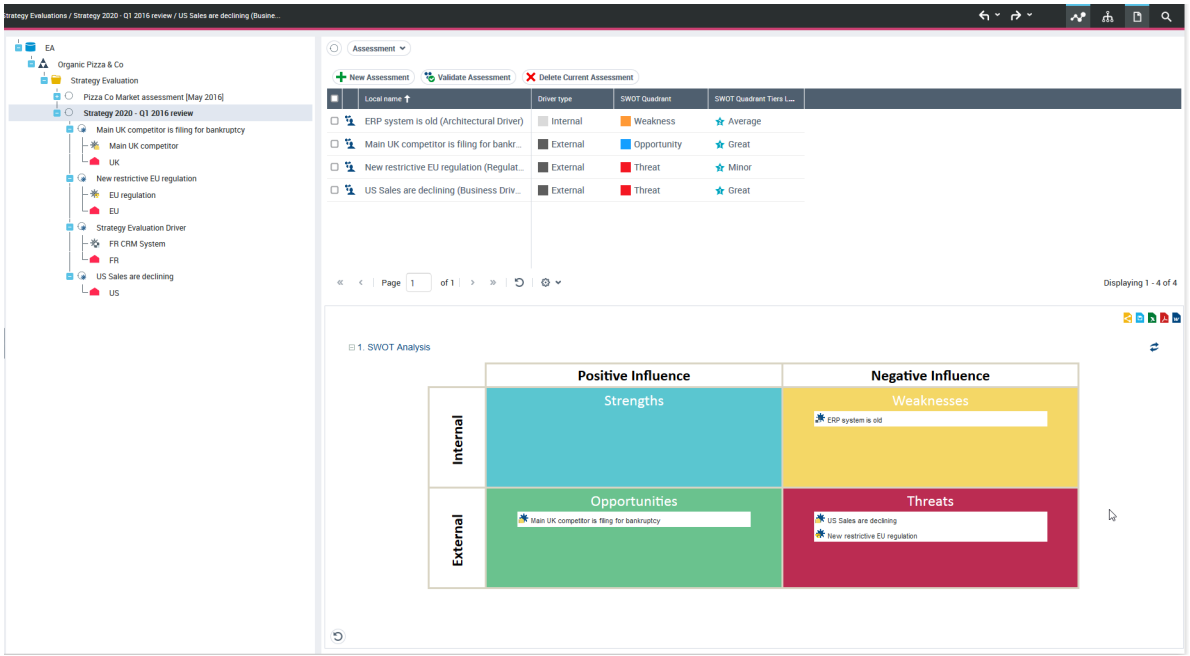
🕮 *A regulatory driver is guided by a change in the regulation framework to which it makes reference.*

🕮 *An architectural driver is guided by a specific characteristic or an internal architectural building block. This characteristic can represent a strength or a weakness*

☛ *For more details on transformation drivers, see "Handling transformation drivers", page 66.*

Assessing the relative importance of drivers

The **SWOT** assessment (Strengths, Weaknesses, Opportunities, Threats or Forces) of drivers is possible within the framework of a strategy assessment.



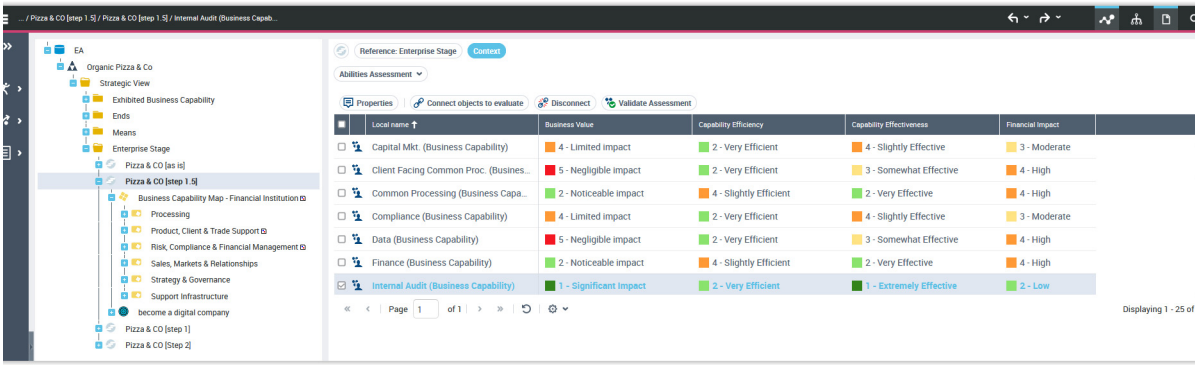
☛ *For more details on strategy assessment elements, see "Using strategy assessments", page 68.*

Defining the target architecture

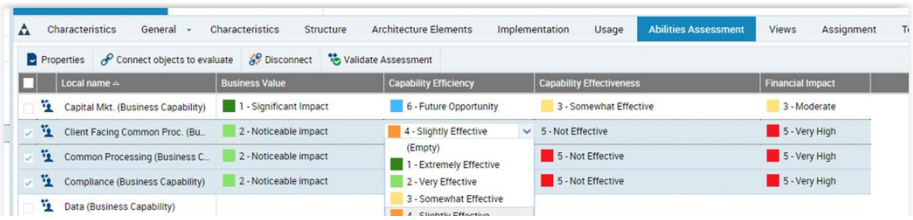
Assessing a business capabilities map

📖 *A business capability map is a set of business capabilities with their dependencies that, together, define a framework for an enterprise stage.*

From an enterprise stage or enterprise, it is possible to assess the business capabilities of the business capability map connected to the current stage.



☛ *For more details on assessing capability maps, see "Using business capability maps", page 78.*



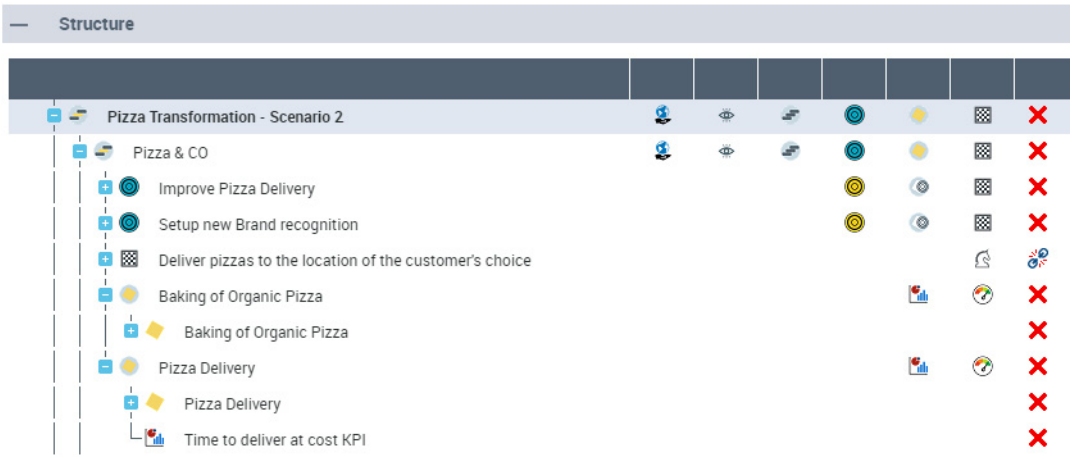
Identifying transformation strategic elements

This step consists of identifying the strategic elements that meets the transformation drivers.

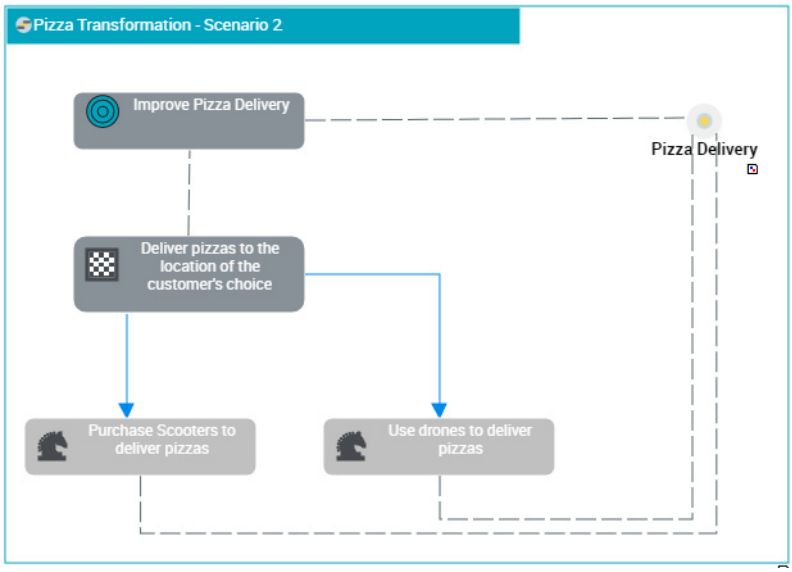
Strategic elements are classified in the following categories:

- Ends, see: "Identifying the transformation ends", page 73,
- Means, see: "Defining Means", page 74.
- the exhibited business capabilities, see: "Managing exhibited business capabilities", page 80.

The strategic elements can be presented and managed with a tree.



An enterprise stage strategy diagram is used to describe the links between the strategic elements (missions, goals, strategies, tactics and exhibited business capabilities).



☛ *For more information on this diagram, see "Building an enterprise stage strategy diagram", page 92.*

Defining the transformation roadmap

This step consists of planning the means (strategies and tactics) to implement to reach the transformation goals identified during the previous step for a given enterprise stage.

> 🕮 *An enterprise is a purposeful undertaking, an effort conducted by one or more organizations, aiming at delivering goods and services, in accordance with the enterprise mission in its changing environment. In the course of its development, the enterprise must adapt to its environment and establish the transformation objectives and goals to be achieved as well as the strategic action plans used to achieve these objectives. The development and achievement of the different adaptation and transformation stages can lead to a modification of the organization's boundaries. This requires the implementation of an integrated team, under the responsibility of a governing body, to involve the stakeholders in the transformation.*
>
> 🕮 *An IT transformation stage is an enterprise transformation stage aimed at aligning the enterprise IT system with the functionalities expected by the operations.*
>
> 🕮 *A business transformation stage is a kind of enterprise transformation stage aiming at the alignment of the enterprise operating model to its strategy and corresponding exhibited business capabilities.*

Defining the enterprise and its events

> 🕮 *An event represents a fact or an action occurring in the system, such as updating client information. It is managed by a broker. An application indicates that it can produce the event by declaring that it publishes it. If an application is interested in an event, it declares that it subscribes to the event.*
>
> 🕮 *An enterprise stage is a past, current or future stage of an enterprise.*

An enterprise is itself an enterprise stage; it is therefore possible in **HOPEX Business Architecture** to define business capabilities and enterprise models for courses of action directly at the level of the root enterprise, and refine the iterative roadmap drill down into the subsequent stage levels.

A basic *enterprise* is made up of the following elements:

- a start enterprise event;

  > ☛ *The start event can be positioned arbitrarily at the beginning of the current year, for example.*

- an end enterprise event;

  > ☛ *The end event can be positioned with an analysis time frame (e.g.: year n+ 5, year n+10)*

- a current ('As-Is') enterprise stage that holds the currently deployed business capabilities map, the business architecture environment and the solution building blocks;

  > ☛ *The end event of this stage is the intermediate event that defines the 'pivot' transformation benchmark beyond which you are in the 'target' stage*

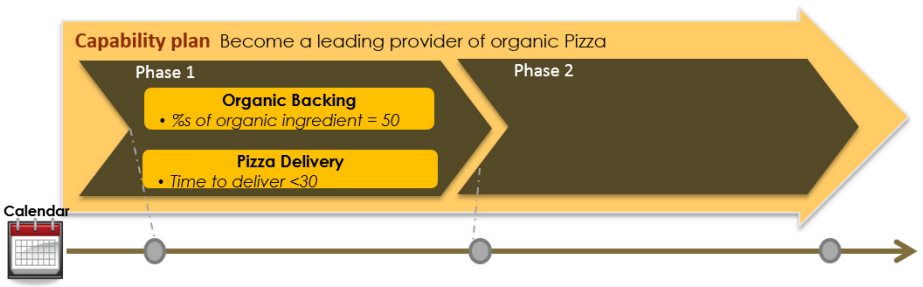
- a target ('To-Be') enterprise stage that holds the target business capability map, the business architecture environment and the target solution building blocks.

  > ☛ *The start date is the end pivot event of the previous ('As-Is') stage.*
  >
  > ☛ *For more details on enterprise stages, see "Defining enterprise stages", page 87*

Defining enterprise stages

An *enterprise stage* is defined by a number of components.

- A business capability map, which contains the capabilities valid for the current enterprise stage;
- A business function architecture environment, which contains the elements that define the enterprise model (operating model) for the current stage.
  - the definition of the ecosystem of the enterprise (interactions with partners),
  - the business function architectures,
  - the business functions.
- The solution building block environments that depend on product licenses used, for example:
  - with **HOPEX IT Architecture**, the environment for Logical Application Systems, the environment for Application Systems, the environment for Resource Architectures, etc.

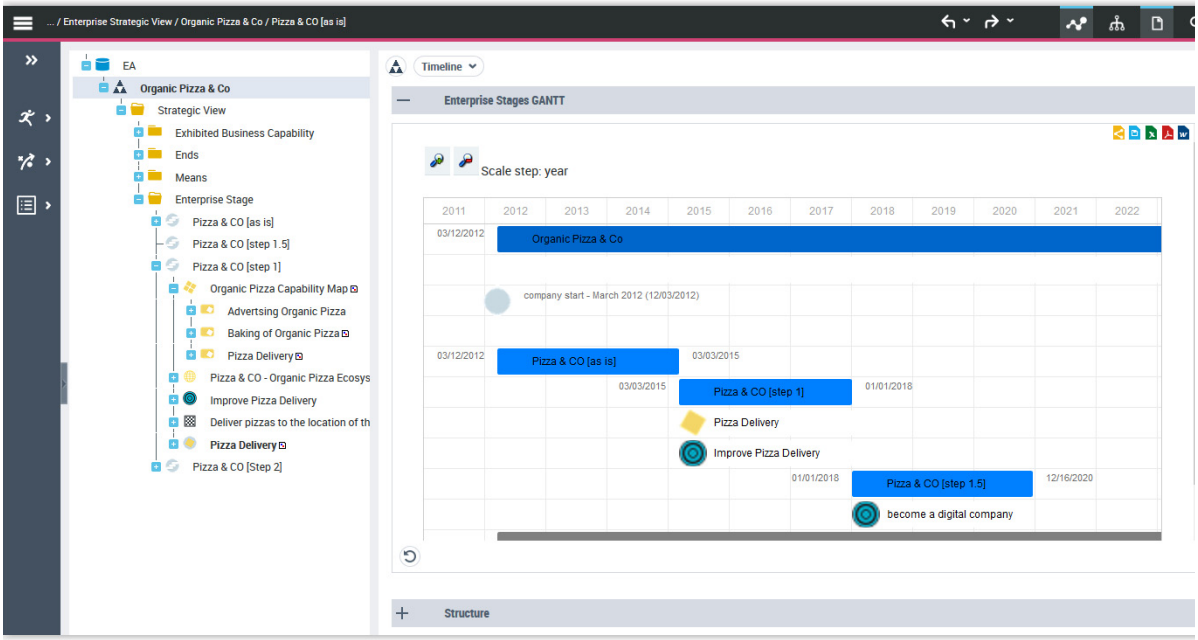


Defining the transformation roadmap

From an enterprise or an enterprise stage, you can define enterprise sub-stages. Each enterprise sub-stage is positioned in the main enterprise according to the main enterprise events, in order to define the transformation roadmap for the enterprise underway.

☛ *For more details on transformation plans, see "Drawing up the roadmap", page 83.*

The transformation roadmap is presented in the form of a Gantt chart.



☛ *For more details on Gantt diagrams, see "Using Gantt Charts", page 91.*

HOPEX Business Architecture Desktop Presentation

☛ ***HOPEX Business Architecture*** *is mainly intended for web users. Desktops described in this guide are accessible only to Web desktop users.*

Connecting to the solution

To connect to **HOPEX Business Architecture**, see HOPEX Common Features, "HOPEX Web Front-End Desktop".

The HOPEX Business Architecture desktop

The menus and commands available in **HOPEX Business Architecture** depend on the product licenses that you have and on the profile with which you are connected.

☛ *For more details on using the Web platform for HOPEX solutions, see the* ***HOPEX Common Features*** *guide.*

Presentation of space common to all profiles

All users have access to the **HOPEX Business Architecture** desktop and access to the following panes:

- **Home** and **List of Tasks** that are common to all **HOPEX** solution users.
- **Ideation** and **Transformation** used to manage project portfolios and access specific reports if your license allows**.**

  ☛ *For more information on project portfolio management, see the "Managing projects" section in the* ***HOPEX Common Features*** *guide.*
- **Reports**: accesses all reports, improving understanding of terms and their use.

Presenting the business function architecture desktop

In addition to the panes offered in standard mode to all **HOPEX Business Architecture** desktop users, the business architect has access to the following panes:

The Vision pane

The **Vision** pane provides access to the following menus.

- **Motivation**, to describe the change drivers and assess them within the framework of strategic assessments;
- **Strategic planning**
  - The 'Enterprise Strategic View' tree to display the enterprise stages and the goals and courses of action,
  - The 'Enterprise Architecture View' tree to display the enterprise stages and the business capabilities maps, the business function architecture environments and the connected solution environments building blocks.
- **Inventories**, to access the main objects.

The Business Architecture pane

The **Business Architecture** pane provides access to the following menus:

- 'Business Architecture Environment by Stage', to display the Environments treeview and their breakdown into components, by stage;
- 'Inventory' of main ***Business Architecture*** objects.

The Organization Architecture pane

The **Organizational Architecture** pane provides access to the inventory of the main objects of the organization.

The Application Architecture pane

The **Application Architecture** pane provides access to the following menus:

- Application system environment by enterprise stage, to display the Application environments and their breakdown by stage;
- Inventory of ***application*** objects

The Technical Architecture pane

The **Technical Architecture** pane provides access to the following menus.

- Resource Architecture Environment by enterprise stage, to display the tree of the Resource Architecture Environment and their breakdown by stage;
- Inventory of main ***technical*** objects.

Presenting the Strategic Planning functional administrator desktop

The strategic planning functional administrator has the same panes as the business architect.

In addition, the functional administrator has access to the **Environment** pane that provides access to the following menus:

- **Enterprises**, to build enterprises, allocate users to working environments and declare regulation frameworks.
- **Reports**, which provide access to the **Container dependencies analysis report** to manage the dependencies between the objects used by the enterprises and their owning libraries.

> ☛ *Objects can be defined by the functional administrator as imported by enterprises or assigned to a different owner to correct the errors.*

BEFORE STARTING WITH HOPEX BUSINESS ARCHITECTURE

Defining a Work Context

☛ *For more details on managing your work context, see the "Enterprises and Libraries" chapter in the **HOPEX Common Features** guide.*

A *library* and an *enterprise* are used to represent a unique work context.

In the context of the **HOPEX Business Architecture** solution, a *library* can hold all the elements of your project: processes and org-units, for example.

📖 *Libraries are collections of objects used to split repository content into several independent parts. They allow creation of virtual partitions of the repository. In particular, two objects owned by different libraries can have the same name.*

An *Enterprise* is used to represent a work context.

📖 *An enterprise is a purposeful undertaking, an effort conducted by one or more organizations, aiming at delivering goods and services, in accordance with the enterprise mission in its changing environment. In the course of its development, the enterprise must adapt to its environment and establish the transformation objectives and goals to be achieved as well as the strategic action plans used to achieve these objectives. The development and achievement of the different adaptation and transformation stages can lead to a modification of the organization's boundaries. This requires the implementation of an integrated team, under the responsibility of a governing body, to involve the stakeholders in the transformation.*

Accessing the list of libraries with HOPEX Business Architecture

To access the list of libraries from the **Environment** navigation pane:

- Select **Enterprises > Container Tree View**.
  The container tree appears.

Creating a library with HOPEX Business Architecture

To create a library from the **Environment** navigation pane:

1. Click **Enterprises > Container Tree View** in the navigation menu.
   The container tree is displayed.
2. Right-click the **Library** folder and select **New > Library**.
   A **Library** creation dialog box opens.
3. Specify the the name of the library.
4. If appropriate, enter the name of the **Owner**.
5. Click **OK**.
   The library appears in the tree.

Accessing the list of enterprises with HOPEX Business Architecture

To access the list of enterprises from the **Environment** navigation pane:

- Select **Enterprises > Enterprises**.
  The list of enterprises is displayed.

Creating an enterprise with HOPEX Business Architecture

To create an enterprise from the **Environment** navigation pane:

1. Select **Enterprises > Enterprises** in the navigation menu.
   The list of enterprises is displayed.
2. Click the **New** button.
   An enterprise creation dialog box opens.
3. Specify the name of the enterprise.
4. Click the **IT Transformation** or **Business Transformation** or **Other** check box.
5. Also specify the types of **Sub Containers**.
6. Click **Next**.
7. Enter the name of the **Work Environment** that you want to create and specify its **Strategic Planning**.
8. Click **OK**.
   The tree for the steps of a **Strategic Planning** type is created automatically.
9. Click **OK**.

> ☛ *For more details on the working environments, see the "Manging an enterprise" chapter from the **HOPEX Common Features** guide.*

Choosing a Working Environment with HOPEX Business Architecture

> ☛ *To change your working environment, see chapter "Choosing a Working Environment" in the **HOPEX Common Features** guide.*

About This Guide

This guide explains how to make best use of **HOPEX Business Architecture** to ensure efficient management of your Business Architecture projects.

Guide Structure

The **HOPEX Business Architecture** guide comprises the following chapters:

- "Business capability maps and business architecture environments", page 29; explains how **HOPEX Business Architecture** helps you in analyzing the business capabilities of your enterprise to check their suitability with your business functions and your skills.
- "Identifying strategic transformation objectives", page 65; describes how the list of drivers specified to assess them in order to refine the list of transformation strategic goals of the enterprise.
- "Drawing up the roadmap", page 83; explains how to identify and plan the transformation stages necessary to acquire the business capabilities used to reach the enterprise goals.
- "HOPEX Business Architecture Reports", page 95, describes reports provided by **HOPEX Business Architecture** to assist users at each architecture evolution project step.

Additional Resources

This guide is supplemented by:

- the **HOPEX Common Features** guide describes the Web interface and tools specific to **HOPEX** solutions.

  ☛ *It can be useful to consult this guide for a general presentation of the interface.*
- The **HOPEX Business Process Analysis** guide, which describes the functionalities proposed to manage processes;
- The **HOPEX IT Architecture** guide, which describes the functionalities proposed IT systems;
- The **HOPEX IT Portfolio Management** guide, which describes functions proposed to manage all your applications.
- The **HOPEX Assessment** guide, which describes functions proposed by **HOPEX** to use and customize assessment questionnaires.
- the **HOPEX Power Supervisor** administration guide.

Conventions used in the guide

☛ *Remarque sur les points qui précèdent.*

📖 *Définition des termes employés.*

☺ *Astuce qui peut faciliter la vie de l'utilisateur.*

Compatibilité avec les versions précédentes.

Ce qu'il faut éviter de faire.

Remarque très importante à prendre en compte pour ne pas commettre d'erreurs durant une manipulation.

Les commandes sont présentées ainsi : **Fichier > Ouvrir**.

Les noms de produits et de modules techniques sont présentés ainsi : **HOPEX**.

BUSINESS CAPABILITY MAPS AND BUSINESS ARCHITECTURE ENVIRONMENTS

To manage your business transformation initiatives, **HOPEX Business Architecture** offers a methodological framework established from international standards (BIZBOK and other architectural frameworks of NAF/DoDAF and TOGAF type), as well as our experience in this area.

The first step in this method consists of analyzing the business capabilities of your enterprise and checking their suitability with your business functions and skills. This work leads to a better understanding of the current state of your organization ('As-Is').

The work described in this chapter is used to establish the analysis reports.

- ✓ "Breakdown map of business capabilities", page 96.
- ✓ "Business Architecture Breakdown Reports", page 97.
- ✓ "Exploded diagram report", page 98.

The following points are covered in this chapter:

- ✓ "Describing the business capability map", page 30
- ✓ "Describing a business architecture environment", page 37
- ✓ "Describing component implementation", page 56

DESCRIBING THE BUSINESS CAPABILITY MAP

A business capability defines an expected skill.

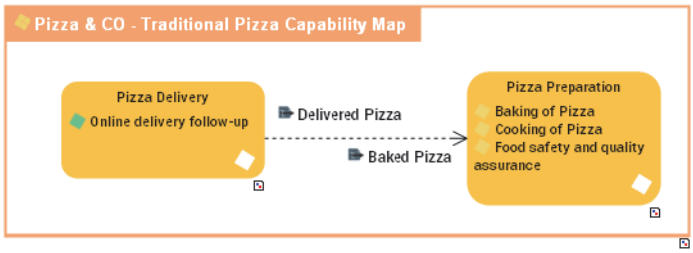
> 🕮 *.A business capability is a set of features that can be made available by a system (an enterprise or an automated system).*

For example, to respond to a customer satisfaction objective, the organization must be able to provide services conforming to contractual commitments.

A capability map describes what the enterprise is capable of producing for its internal needs or for meeting the needs of its clients. It is thus based on the main business capabilities of its activity at a given moment.

> 🕮 *A business capability map is a set of business capabilities with their dependencies that, together, define a framework for an enterprise stage.*

For example, the standard capability to provide pizzas is based on the "Preparation of pizzas" and "Delivery of pizzas" business capabilities.



Building the business capability map

A business capability map is used to represent the main business capabilities that interact with an enterprise.

Creating a business capability map

To create a *business capability map*:

1. From the **Vision** navigation pane, select **Inventories**.
2. Click on **Business Capability Map**.
   The list of business capability maps appears in the edit area.
3. Click **New**.
   The new business capability map appears in the list. By default it is owned by the current enterprise.

The properties of a business capability map

The **Characteristics** properties page of the business capability map provides access to:

- its **Owner**, by default on creation of the business capability map, the current enterprise.
- its **Name**,
- the text of its **Description**.

With **HOPEX Business Architecture**, a business capability map is described by the following pages:

- the **Structure** page is used to specify on the one hand the list of business capability components that constitute the business capability map described, and on the other hand, the dependencies between these components,

  ☛ *For more details on business capacity structure, see "Using the capability compositions", page 31 and "Defining business capability dependencies", page 32.*

- The **Implementation** page provides access to the list of business functional areas or solution building blocks that implement the capability map.

  ☛ *For more details on implementation of business capabilities, see "Creating a business capability map realization", page 56.*

- The **Usage** page provides access to the enterprise stages that use the capability map.

  📖 *An exhibited business capability is measurable objectively within the framework of an enterprise stage, on a defined geopolitical scope (site), and focused on a given market segment (business partner).*

  ☛ *For more details on the definition of business capabilities, see "Defining enterprise stages", page 87.*

Creating a business capability map diagram

To create a business capability map diagram:

1. Right-click the business capability map that interests you and select **New > Business Capability Map Diagram**.
   The diagram opens in the edit area. The frame of the business capability map described appears in the diagram.
   You can construct this diagram in tabular input mode.

   ☛

   ☛ *Tabular input is available with the **HOPEX Web Front-End** module. For more information on using tabular input, see the "Entering a diagram in tabular mode" chapter in the **HOPEX Common Features** guide.*

Using the capability compositions

The components represented in a business capability map diagram are **Capability Compositions**. Each capability composition is associated with a business capability.

📖 *A **Business capability component** is the involvement of a business capability in the context of a business capability map (one and only one) linked to an enterprise.*

To add a capability composition to a business capability map diagram:

1. In the diagram insert toolbar, click **Capability Composition**.
2. Click in the frame of the business capability map.
   The creation window for a capability composition opens.
3. Click on the arrow associated with the **Name** field and select the business capability that interests you.

4. Click **OK**.
   The capability composition appears in the diagram.

   ☛ *If the business capability is associated with functionalities, they also appear. For more details on the capabilities and functionalities associated with business capabilities, see "Defining the business skills and functionalities associated with business capabilities", page 35.*

Defining business capability dependencies

A dependency link between one capability composition and another is used to specify the elements on which this dependency is based.

For example, for "Delivery of pizzas" use "Prepare the pizzas". Note that the expected result (business effect) of "Delivery of pizzas" is a "Pizza delivered" and the expected result (business effect) of "Preparation of pizzas" is a "Cooked pizza"

Dependent Business Effect and **Desired Business Effect** are the business capability results.

☛ *For more details on the results of business capabilities, see "Describing the outcomes", page 55.*

☛ *A single capability composition can have more than one dependency within a single diagram.*

To create dependency links between two capability compositions:

1. In the insert toolbar, click **Business Capability Dependency**.
2. Click the user component, and keeping the left mouse button pressed, move the cursor to the assembly used.
3. Release the mouse button.
   The capability composition appears in the diagram.

To enter the results concerned by a dependency between two business capability components:

1. Open the **Characteristics** properties dialog box.

2. Enter the user component result in the **Dependent Business Effect** field.

   For example, "Pizza delivered".

3. Enter the user assembly result in the **Desired Business Effect** field.

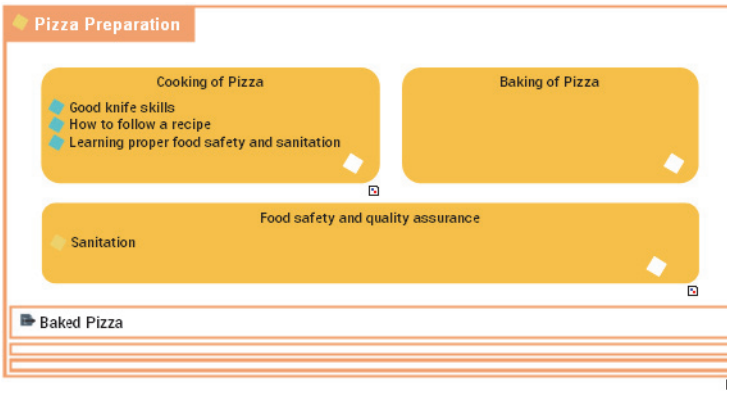
   For example, "Pizza cooked".

Describing a business capability

A business capability can be based on business sub-capabilities. The capabilities expected by the business capabilities described are the capabilities associated with each business sub-capability.

The business capability that consists of preparing pizzas is broken down into a number of business capabilities: "Cook pizzas", for example.

With **HOPEX Business Architecture,** the capability structure diagram describes the composition of a business capability.



☛ *For more details on the breakdown map of business capabilities, see* *"Breakdown map of business capabilities", page 96*.

Creating a business capability

You can create a new business capability in a number of ways:

- From the business capability map diagram,
- From the properties page of a business capability map,
- From the navigation pane.

To create a *business capability* from the **Vision** navigation pane:

1. Select **Inventories > Business Capabilities**.
   The list of business capabilities appears in the edit area.

2. Click **New**.
   The new business capability appears in the list. By default it is owned by the current enterprise.

The properties of a business capability

The **Characteristics** property page of the business capability map provides access to:

- its **Owner**, by default on creation of the business capability, the current enterprise.
- its **Name**,
- the text of its **Description**.
- the **Desired Capability Effect** is an **Outcome**.

  ```
  For example, the desired capability effect of "Delivery of
  pizzas" is a "Delivered pizza"
  ```

  ☛ *For more details on results, see "Describing the outcomes", page 55.*

  ☛ *For more details on the use of results, see "Defining business capability dependencies", page 32.*

With **HOPEX Business Architecture** a business capability is described by the following pages:

- the **Structure** page specifies a part of the list of components that constitute the business capability described, as well as the dependencies between these components,

  ☛ *For more details on the structures of a business capability, see "Defining the structure of a business capability", page 35.*

- The **Implementation** page provides access to the list of business functions (or solution building blocks) that implement the capability.

  ☛ *For more details on implementation of business capabilities, see "Creating a business capability realization", page 56.*

- In the **Usage** page, the **Capability Component** section provides access to the capacity maps that use the described capability.

  ☛ *For more details on the components of a business capability, see "Using the capability compositions", page 31.*

- In the **Usage** page, the **Capability Exhibition** section provides access to the enterprise stages for which the capability described becomes an exposed capability.

  📖 *An exhibited business capability is measurable objectively within the framework of an enterprise stage, on a defined geopolitical scope (site), and focused on a given market segment (business partner).*

  ☛ *For more details on enterprise stages, see "Defining enterprise stages", page 87*

- the **Expected Capabilities** property page is used to specify a list of business skills and functionalities that are expected from the business capability.

  ☛ *For more details on the skills and functionalities associated with a business capability, see "Defining the business skills and functionalities associated with business capabilities", page 35.*

Creating a business capability structure diagram

To create a business capability structure diagram:

- Right-click the business capability that interests you and click **New > Capability Structure Diagram**.
  The diagram opens in the edit area. The frame of the business capability described appears in the diagram.
  You can construct this diagram in tabular input mode.

  ☛

  ☛ *Tabular input is available with the **HOPEX Web Front-End** module. For more information on using tabular input, see the "Entering a diagram in tabular mode" in the **HOPEX Common Features** guide.*

Defining the structure of a business capability

The components represented in a business capability structure diagram are **Capability Composition**. Each capability composition is associated with a business capability.

> 🕮 *A **Business capability component** is the involvement of a business capability in the context of a business capability map (one and only one) linked to an enterprise.*
>
> ☛ *For more details on how to use business components in a diagram, see "Using the capability compositions", page 31.*

A dependency link between one capability composition and another is used to specify the elements on which this dependency is based, that is, the effect of one required by the effect of the other.

> ☛ *For more details on creating dependency links between two capability compositions, see "Using the capability compositions", page 31:*

The capability compositions and their dependencies appear in the **Structure** property page of the business capability described.

Defining the business skills and functionalities associated with business capabilities

> 🕮 *A functionality is a capability expected from an equipment item (hardware or software) to ensure the operation of a business function or an organization. If it is a software functionality, it can be provided by an application.*
>
> 🕮 *A value stream is an end-to-end collection of Value Stages that creates an outcome for a customer, who may be the ultimate customer or an internal end-user of the value stream.*

Each business capability is associated with functionalities that it is able to provide and that it needs to ensure its functionalities.

To associate a *skill* with a business capability:

1. Open the **Expected Capabilities** properties window of the business capability.
2. In the **Expected Business Skill** section, click **New**.
   An **Expected Business Skill** creation dialog box opens.
3. Click, for example, the **Creating a New Business Skill** check box.
4. Specify the name of the skill.

5. Click **OK**.
   The expected business skill appears in the list of skills associated with the business capability.

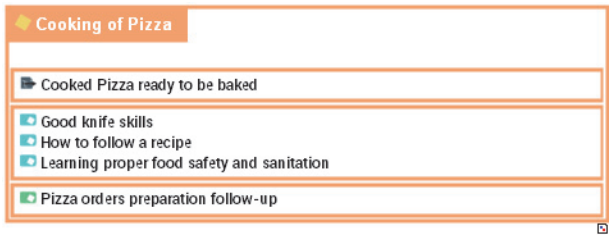
   ☛ *For more information on enterprise skills, see "Describing Business Skills", page 48.*

To associate a *functionality* with a business capability:

1. Open the property pages of the business capability concerned and select the **Expected Capabilities** page.
2. In the **Expected Functionality** section, click **New**.
   The **Expected Functionality** creation dialog box opens.
3. Click, for example, the **Creating a New Functionality** check box.
4. Specify the name of the functionality.
5. Click **OK**.
   The expected functionality appears in the list of functionalities associated with the business capability.

   ☛ *For more information on enterprise functionalities, see "Describing functionalities", page 51.*

The use of skills, functionalities and the expected effects appear in the diagrams, at the bottom of the frame of the capability described.



A report is available to check the suitability between the business capability map and the operational environment, for more details, see "Describing component implementation", page 56.

DESCRIBING A BUSINESS ARCHITECTURE ENVIRONMENT

One of the most important phases in describing a business architecture environment is defining and understanding of the enterprise functional architecture.

The functional architecture enables the organization to understand, independently of its physical structure, which capabilities and skills it includes, those it needs, and how these contribute to its processes.

The description of the functional architecture also enables identification of areas of the organization where skills and processes are duplicated and where synergies exist. These areas are not necessarily visible from the organizational structure.

The following points are covered here:

Managing a business architecture environment

> 🕮 *A business architecture environment represents the relationships of a business functional area with its partners.*

A business architecture environment diagram describes the interactions between the main internal components of the environment described and the external components. It thus describes:

- the internal and external business functional areas,

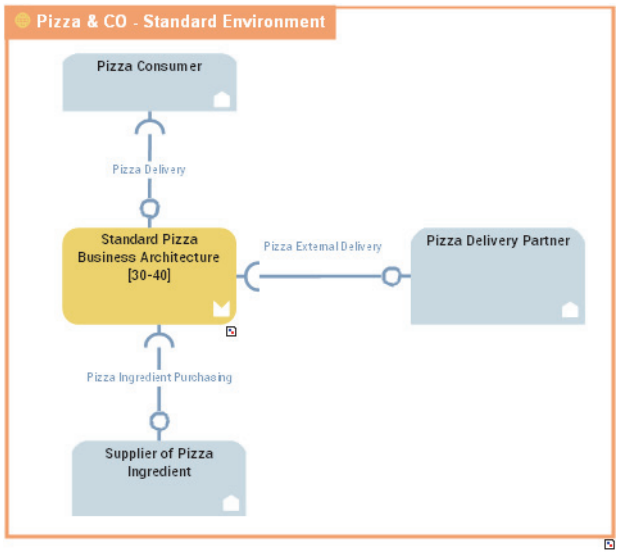
  > 🕮 *A business functional area is a grouping of business functions and their associated value streams on the conjunction of two main criteria: their need in accomplishing one or more business capabilities and the common skills and functionalities required to accomplish these business capabilities.*

- the business partners,

  > 🕮 *A business partner designates a third-party who is in relation with the enterprise within the framework of a given business architecture environment. Examples: private sector client, regulatory organization, supplier.*

In this example, the business architecture environment of the pizza-making company is made up of the historical business functional area and its interactions with external

partners: clients and suppliers. You can see in the diagram that delivery is outsourced.



Communications between the objects are represented by interactions that represent requests and service provision.

> *An interaction represents a contract established in a specific context between autonomous entities that are internal or external to an enterprise. These entities can be enterprise org-units, applications, activities or processes, as well as external org-units. The content of this contract is described by an exchange contract.*
>
> ☛ *For more details on interactions between components, see "Managing Interactions", page 44.*

Creating a business architecture environment

To create a *business architecture environment*:

1. In the **Business Architecture** navigation pane, select **Inventories > Business Architecture Environments**.
   The list of business architecture environments appears in the edit area.
2. Click **New**.
   The new business architecture environment appears in the list. By default it is owned by the current enterprise.

The properties of a business architecture environment

The **Characteristics** properties page of the business architecture environment provides access to:

- its **Owner**, by default on creation of the business architecture environment, the current enterprise.

  ☛ *For more details on containers, see "Concept and Term", page 10.*

- its **Name**,
- the text of its **Description**.
- its **Owned Realization**.

  ☛ *For more details on the realization of business capabilities, see "Creating a business capability realization", page 56.*

With **HOPEX Business Architecture**, a business architecture environment is described by the following property pages:

- the **Structure** page which provides access to the list of components of the business architecture environment.

  ☛ *For more details on the components of the business architecture environment, see "Creating a business architecture environment diagram", page 39.*

- the **Implementation** page, which provides access to the list of resource architecture, application system and logical application system environments that implement the business architecture environment.
- the **Usage** page, which identifies the different user enterprise stages of the business architecture environment.

  ☛ *For more details on the stages of an environment, see "Defining enterprise stages", page 87.*

- the **Performed Process** page, which provides access to the value chains executed in the business functional area context.

  ☛ *For more details on value chains, see "Describing value streams", page 53.*

- the **Assignment** page, which specifies the managers of the business architecture environment.

Creating a business architecture environment diagram

To create a business architecture environment diagram:

1. Right-click the business function architecture environment and click **New > Business Function Architecture Environment Diagram**.
   The diagram opens in the edit area.
   You can construct this diagram in tabular input mode.

   ☛

   ☛ *Tabular input is available with the **HOPEX Web Front-End** module. For more information on using tabular input, see the "Entering a diagram in tabular mode" in the **HOPEX Common Features** guide.*

Creating an internal or external business functional architecture area

To define that a functional area is used in the context of a business architecture environment, you can:

1. Create a *Business functional area Use* component that is part of the architecture environment described or an *External Business functional area Use* type component if it is a business functional area that belongs to another environment.
2. Associate the business functional area implemented with the *Business functional area use* created.

   In our example, the pizza making history business function is an internal environment element.

   ☛ *For more details on business partners, see* *"Describing a business functional area", page 41*.

To create a **Business functional area use**:

1. In the insert toolbar for the business architecture environment diagram, click **Business Function Architecture Use**.
2. Click in the business architecture environment frame described.
3. Select the business functional area that interests you and/or create a new one.

   Create, for example, the "Pizza making" business functional area.
4. Click **OK**.
   The business functional area appears in the diagram.

   ☛ *Proceed in the same way to create an* ***External Partner Business Functional Area Use****:*

Creating a business partner component

To describe a business architecture environment that uses participants internal or external to the environment described, you must:

1. Create a *Business partner component*.
2. Associate the person (or the person group) to the *Business partner component* created.

   In the example of the business architecture environment of the pizza making company, the business partners used are the clients and the service provider who ensures the pizza delivery.

   ☛ *For more details on business partners, see* *"Describing Business Partners", page 46*.

To create a **Business partner component**:

1. In the insert toolbar for the business architecture environment diagram, click **Business Partner Component** and click in the frame of the diagram.
   A creation window prompts you to choose the existing **Business Partner** or create a new one.

   Create for example the "Clients" business partner.
2. Click **OK**.
   The business partner use appears in the diagram.

Describing a business functional area

A business functional area is a grouping of business functions and their associated value streams on the conjunction of two main criteria: their need in accomplishing one or more business capabilities and the common skills and functionalities required to accomplish these business capabilities.

Accessing the business functional area list

To access the business functional area list from the **Business Architecture** navigation pane:

1. Select **Inventories > Business Functional Areas** in the navigation menu.
   The list of business functional areas appears.

The properties of a business functional area

The **Characteristics** properties page of a functional area provides access to:

- its **Name**,
- its **Owner**, by default on creation of the business functional area, the current enterprise.
- the text of its **Description**.
- its **Owned Realization**.

> *For more details on creating a business capability, see "Creating a business capability realization", page 56.*

With **HOPEX Business Architecture**, a business functional area is described in the following pages:

- the **Structure** page, which provides access to the list of components of the business functional area.

  > *For more information on the components of a business functional area, see "Describing a business functional area", page 42.*

- The **Usage** page, that provides access to the environments in which the business function architecture is used.

  > *For more details on business function architecture environments, see "Creating a business architecture environment diagram", page 39.*

- the **Assignment** page, which is used to specify the managers of the business functional area.
- the **Performed Process** page, which provides access to the value streams executed in the context of the business functional area.

  > *For more details on value streams, see "Describing value streams", page 53.*

- the **Service Points and Service Requests** page, which specifies the services expected or delivered by a business function.

  > *For more information on these service points and request points, see "Managing service points and request points", page 43.*

Describing a business functional area

A business functional area diagram describes the interactions between the main internal components of the architecture described. It thus describes:

- the *uses of the business functional area*,

  A business functional area is a grouping of business functions and their associated value streams on the conjunction of two main criteria: their need in accomplishing one or more business capabilities and the common skills and functionalities required to accomplish these business capabilities.

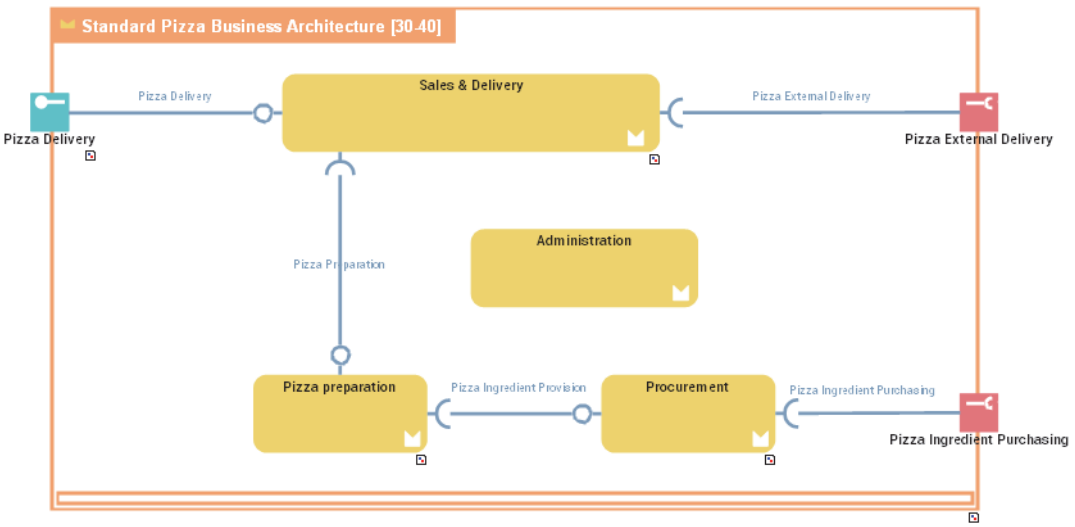
  For example, the "Pizza making" business functional area is based on business functional areas such as "Sales and delivery" or "Pizza preparation".

  ☛ *For more information on the use of a business functional area, see* *"Creating an internal or external business functional architecture area", page 40*.

- the *business components*.

  A business function is a conceptual unit of the division of responsibilities in an enterprise. It is used to structure the management of information processing, energy, and equipment produced or used. Business functions define the skills and the functionalities necessary to the enterprise to fulfill its mission.

  ☛ *For more details on business functions, see* *"Describing business functions", page 45*.



With **HOPEX Business Architecture**, communications are based on:

- access points: *service points* and *request points*.

  A service point is a point of exchange by which an agent offers a service to potential customers.

  A request point is a point of exchange by which an agent requests a service from potential suppliers.

  ☛ *For more details on interactions between components, see* *"Managing service points and request points", page 43*.

- *interactions*

  An interaction represents a contract established in a specific context between autonomous entities that are internal or external to an enterprise. These entities can be enterprise org-units, applications, activities or processes, as well as external org-units. The content of this contract is described by an exchange contract.

  ☛ *For more details on interactions between components, see* *"Managing Interactions", page 44*.

Managing service points and request points

A business business functional area is created to ensure one or more services. These services are represented by *service points*. The service is requested according to precise terms defined by an *exchange contract* assigned to the service point.

A service point is a point of exchange by which an agent offers a service to potential customers.

An exchange contract is a model of a contract between organizational entities. This contract is described by exchanges between an initiator role and one or several contributor roles.

A *request point* is used to represent the use of an external service.

A request point is a point of exchange by which an agent requests a service from potential suppliers.

The service is requested according to precise terms defined by an *exchange contract* assigned to the request point.

Components that issue a request are linked to the request point by an interaction.

```
In the example, the request point that represents the
"External delivery of pizzas" is linked to the "Sales and
deliveries" business functional area by an interaction.
```

Creating a service point or a request point

The process for creating a *service point* or *request point* is identical.

To create a service point:

1. In the diagram insert toolbar, click **Service Point**.
2. Position the object at the edge of the architecture frame.
   A creation dialog box opens.
3. Click the arrow to the right of the **Exchange Contract** field to define the exchange contract enabling activation of this service point, and select, for example, **Connect Exchange Contract**.
   A query window opens.
4. Select the exchange contract associated with this service point.

5. Click **Next**.
   A dialog box opens proposing a list of exchange contract roles that can be associated with the service point.

   ☛ *This second dialog box is not proposed if there is only one candidate role that can be associated with the service point.*
6. Select the role that interests you and click **OK**.
   The service point appears in the diagram.

To change the service point name:

1. Click the name of the service point and press key F2.
2. Enter the new name used when specifying interaction points.

Managing Interactions

An *Interaction* represents the exchange of information between architecture components.

📖 *An interaction represents a contract established in a specific context between autonomous entities that are internal or external to an enterprise. These entities can be enterprise org-units, applications, activities or processes, as well as external org-units. The content of this contract is described by an exchange contract.*

Content of an interaction is described by an *exchange contract*.

📖 *An exchange contract is a model of a contract between organizational entities. This contract is described by exchanges between an initiator role and one or several contributor roles.*

Creating an Interaction

To create an interaction:

1. In the diagram insert toolbar, click **Interaction**.
2. Draw a link between the two communication entities.
3. In the add interaction dialog box, specify the exchange contract you wish to use.

   ☛ *You can also create a new exchange contract, see "Creating an Exchange Contract from an Interaction", page 44.*
4. Click **OK**.

Creating an Exchange Contract from an Interaction

You can create an exchange contract:

- from a library,
- from an interaction in a diagram.

To create an exchange contract, in a diagram, from an interaction:

1. In the diagram insert toolbar, click **Interaction**.
2. Draw a link between the two communication entities.
3. In the add interaction dialog box, click the arrow at the right of the **Exchange Contract** box and select **New**.
   The **Creation of Exchange Contract** dialog box opens.
4. Enter the name of the exchange contract in the **Name** box.
5. Click **OK**.
   The interaction and exchange contract are created.

Describing business functions

A business function is a conceptual unit of the division of responsibilities in an enterprise. It is used to structure the management of information processing, energy, and equipment produced or used. Business functions define the skills and the functionalities necessary to the enterprise to fulfill its mission.

Accessing the list of business functions

To access the list of business functions from the **Business Architecture** navigation pane:

- Click **Inventories > Business Function** in the navigation menu.
  The list of business functions appears in the edit window.

Business properties

The **Characteristics** properties page of a business function provides access to:

- its **Owner**, by default on creation of the business function, the current enterprise.
- its **Name**,
- the text of its **Description**.
- its **Owned Realization**.

> *For more details on creating a business capability, see "Creating a business capability realization", page 56.*

With **HOPEX Business Architecture**, a business function is described by the following pages:

- the **Required Abilities** page is used to specify a list of skills and functionalities required by the business.

  > *For more details, see "Describing Business Skills", page 48 and "Describing functionalities", page 51.*

- the **Implementation** page provides access to the list of components that implement the business function.

  > *For more details on realizations, see "Describing component implementation", page 56.*

- the **Usage** page that identifies the business functional areas that use the business function.

  > *For more details on business partners, see "Describing a business functional area", page 42.*

- the **Assignment** page, which specifies the managers of the business function.

  > *For more details on assignments, see "Connecting a person to a person group", page 46.*

- the **Performed Process** page, which provides access to the value streams executed.

  > *For more details on value streams, see "Describing value streams", page 53.*

Describing Business Partners

A business partner designates a third-party who is in relation with the enterprise within the framework of a given business architecture environment. Examples: private sector client, regulatory organization, supplier.

Accessing the business partners list

To access the list of business partners from the **Business Architecture** navigation pane:

- Select **Inventories > Business Partners** in the navigation menu.
  The list of business partners appears in the edit area.

The properties of a business partner

The **Characteristics** properties page of the business partner provides access to:

- its **Owner**, by default on creation of the business partner, the current enterprise.
- its **Name**,
- the text of its **Description**.

With **HOPEX Business Architecture**, a business partner is described by the following pages:

- the **Usage** page that is used to draw up the list of business architecture environments in which the business partner is used.

  ☛ *For more details on business architecture environments, see "Managing a business architecture environment", page 37.*

- the **Assignment** page is used to specify the persons and the person groups associated with the business partner.

  ☛ *For more details on assignments, see "Connecting a person to a person group", page 46.*

Connecting a person to a person group

Persons (for example: Mr. Dupont or the ISD) or person groups (for example, governance organizations: Architectural Firm or Executive Committee) can be attached to various constituent elements of the business architecture, including businesses or business partners.

A person (System) represents a person in the enterprise. This person can be assigned a login and a role (or a profile depending on the connection mode). The login provides access to the HOPEX Application. The role (or the profile) defines the access to product functions and repositories. A system person, if assigned a login, has a specific desktop in each database, and can connect to this desktop from any workstation in a given environment.

Describing the business partner groups

Accessing the business partner group list

To access the business partner group list from the **Business Architecture** navigation pane:

- Select **Inventories > Partner Groups** in the navigation menu.
  The list of business partner groups appears in the edit area.

The properties of a business partner group

The **Characteristics** properties page of a business partner group provides access to:

- its **Owner**, by default on creation of the business partner, the current enterprise.
- its **Name**,
- the text of its **Description**.
- the list of business partners belongs to the group.

Describing the business skill map

A business skill map is a set of business skill with their dependencies that, together, define a framework for an enterprise stage.

Accessing the list of business skill maps

To access the list of business skill maps from the **Business Architecture** navigation pane:

- Click **Inventories > Business Skill Map** in the navigation menu.
  The list of business skill maps appears in the edit area.

The properties of a business skill map

The **Characteristics** properties page of the business skill map provides access to:

- its **Owner**, by default during creation of the business skill map, the current enterprise.
- its **Name**,
- the text of its **Description**.

With **HOPEX Business Architecture**, a business skill map is described by the following pages:

- the **Structure** page that specifies the list of business skill components owned and the dependencies between them.

For more information on the components of business skills, see "Creating a business skill component in a diagram", page 48and

"Defining the business skill dependencies", page 48.

- the **Usage** page which identifies the different enterprise stages that use the business skill map.
- the **Assignment** page which is used to specify the managers of the business skill map.

Creating a skill map diagram

To create a skill map diagram:

- Right-click the business skill map that interests you and select **New > Skill Map**.
  The diagram opens in the edit area. The frame of the business skill map described appears in the diagram.

Creating a business skill component in a diagram

The components represented in a business skill map are **Business skills**.

> 🕮 *A value stream is an end-to-end collection of Value Stages that creates an outcome for a customer, who may be the ultimate customer or an internal end-user of the value stream.*

To add a sub-skill to the business skill map diagram:

1. In the diagram insert toolbar, click **Business skill component**.
2. Click in the frame of the business skill map.
   The business skill component creation window opens.
3. Select the business skill that interests you.
4. Click **OK**.
   The business skill component appears in the diagram.

Defining the business skill dependencies

You can create a dependency link between two business skills to specify that one business skill is required for the other in the context of a skill map.

To create dependency links between two business skills:

1. In the insert toolbar, click **Business Skill Dependency**.
2. Click the main business skill, and keeping the left mouse button pressed, move the cursor to the business skill required.
3. Release the mouse button.
   The link appears in the diagram.

Describing Business Skills

> 🕮 *A value stream is an end-to-end collection of Value Stages that creates an outcome for a customer, who may be the ultimate customer or an internal end-user of the value stream.*

To be able to subsequently check that each business capability is implemented by a suitable business skill, you must define the required business skills and functionalities, for each business function.

To access the business skill list from the **Business Architecture** navigation pane:

1. Select **Inventories > Business Skills** in the navigation menu.
   The list of business skill maps appears in the edit area.

The **Characteristics** property page of the business skill provides access to:

- its **Owner**, by default during creation of the business skill map, the current enterprise.
- its **Name**,
- the text of its **Description**.

With **HOPEX Business Architecture** a business skill is described by the following pages:

- the **Structure** page specifies a list of business skill held and the dependencies between them.

  ☛ *For more details on business skill diagrams, see "Creating a Skill Diagram", page 49.*

- the **Implementation** page provides access to the list of components that implement the business skill.

  ☛ *For more details on realizations, see "Describing component implementation", page 56.*

- the **Usage** page, **Skill Component** section, provides access to the business skills that use the described business skill.

  ☛ *For more details on skills used, see "Creating a business skill component in a diagram", page 48.*

- the **Usage** page, **Business Capability** section, provides access to the business capabilities that require the described business skill.

  ☛ *For more details on the skills associated with business capabilities, see "Defining the business skills and functionalities associated with business capabilities", page 35.*

- the **Usage** page, **Business Function** section, provides access to the business functions that require the described business skill.

  ☛ *For more details on business functions, see "Business properties", page 45.*

Creating a Skill Diagram

To create a skill diagram:

1. Right-click the business skill that interests you and click **New > Skill diagram**.
   The diagram opens in the edit area. The frame of the business skill described appears in the diagram.

To create a business skill component in a diagram, see "Creating a business skill component in a diagram", page 48.

To define the dependencies of business skills, see "Defining the business skill dependencies", page 48

Describing the functionality map

A functionality map is a set of functionalities with their dependencies that, jointly, define the scope of a hardware or software architecture.

Accessing the list of functionality maps

To access the list of functionality maps from the **Business Architecture** navigation pane:

- Click **Inventories > Functionality Maps** in the navigation menu.
  The list of functionality maps appears in the edit area.

The properties of a functionality map

The **Characteristics** properties page of a functionality map provides access to:

- its **Owner**, by default on creation of the business function, the current enterprise.
- its **Name**,
- the text of its **Description**.

With **HOPEX Business Architecture**, a functionality is described in the following pages:

- the **Structure** page, which is used to specify a list of functional components owned and the dependencies between them.

  For more information on the functionality components, see "Creating a functionality component in a functionality map diagram", page 50 and "Defining Functionality dependencies", page 51.
- The **Usage** page, which is used to identify the IT transformation stages that use this functionality map.
- the **Assignment** page, which is used to specify the managers of the functionality map.

Creating a functionality map

To create a functionality map diagram:

- Right-click the functionality map that interests you and select **New > Functionality Map Diagram**.
  The diagram opens in the edit area. The frame of the functionality map described appears in the diagram.

Creating a functionality component in a functionality map diagram

The components represented in a functionality map are **Functionality components**.

A functionality is a capability expected from an equipment item (hardware or software) to ensure the operation of a business function or an organization. If it is a software functionality, it can be provided by an application.

To add a functionality component in the functionality map diagram:

1. In the diagram insert toolbar, click **Functionality Component**.
2. Click the functionality map frame.
   The functionality component creation window opens.
3. Click, for example, **Reusing an Existing Functionality**.
4. Click **Display Scope** to access the list of functionalities linked to the enterprise.
5. Select the functionality that interests you.
6. Click **OK**.
   The functionality component appears in the diagram.

Defining Functionality dependencies

A dependency link between one functionality and another is used to specify the elements on which this dependency is based.

```
For example, for a "Pizza delivery" functionality, there
must first be a "Prepare pizzas" functionality. Note that
the effect of the "Deliver pizzas" functionality is a "Pizza
delivered" functionality and the effect of the "Prepare the
pizzas" functionality is a "Cooked pizza"
```

To create dependency links between two functionalities in a functionality map diagram:

1. In the insert toolbar, click **Functionality Dependency**.
2. Click the functionality component, and keeping the left mouse button pressed, move the cursor to the functionality component used.
3. Release the mouse button.
   The creation window for the functionality dependency opens.
4. Enter the user component result of the user functionality in the **Dependent Application Effect** field.

   ```
   For example, "Pizza delivered".
   ```
5. Enter the content result of the functionality used in the **Necessary Application Effect** field.

   ```
   For example, "Pizza cooked".
   ```
6. Click **OK**.
   The link appears in the diagram.

> ☛ *A single sub-functionality can have more than one dependency within a single diagram.*

Describing functionalities

> 🕮 *A functionality is a capability expected from an equipment item (hardware or software) to ensure the operation of a business function or an organization. If it is a software functionality, it can be provided by an application.*

To access the list of functionalities from the **Business Architecture** navigation pane:

- Click **Inventories > Functionalities** in the navigation menu.
  The list of functionalities appears in the edit area.

To create a new functionality:

1. In the **Business Architecture** navigation pane, select **Inventories > Functionalities**.
2. Click **New**.
   A **Functionalities** creation dialog box opens.
3. Enter the name.
4. Click **OK**.
   The functionality created appears in the list of functionalities.

The **Characteristics** property page of the functionality provides access to:

- its **Owner**, by default during creation of the functionality, the current enterprise.
- its **Name**,
- the text of its **Description**.
- the **Desired Application Effects**:

  ☛ *For more information on the effects of expected functionalities, see "Defining Functionality dependencies", page 51.*

With **HOPEX Business Architecture** a functionality is described by the following pages:

- the **Structure** page is used to specify a list of functionalities owned and the dependencies between them.

  ☛ *For more information on the structure of functionalities, see "Creating a Functionality Diagram", page 53.*
- the **Implementation** page provides access to the list of architecture elements that implement the functionality.
- In the **Usage** page, the **Capability Component** section provides access to the functionality maps that use the described functionality.

  ☛ *For more details on the relationship between functionalities, see "Creating a functionality component in a functionality map diagram", page 50.*
- In the **Usage** page, the **Business Capability** section provides access to the business capabilities that require the described functionality.

  ☛ *For more details on the functionalities associated with business capabilities, see "Defining the business skills and functionalities associated with business capabilities", page 35.*
- In the **Usage** page, the **Business Function** section provides access to the business functions that require the described functionality.

  ☛ *For more details on businesses, see "Business properties", page 45.*
- In the **Usage** page, the **Capability Exhibition** section provides access to the exposed business capabilities that require the described functionality.

  🕮 *An exhibited business capability is measurable objectively within the framework of an enterprise stage, on a defined geopolitical scope (site), and focused on a given market segment (business partner).*

Creating a Functionality Diagram

To create a functionality diagram:

- Right-click the functionality that interests you and click **New > Functionality diagram**.
  The diagram opens in the edit area. The frame of the functionality described appears in the diagram.

To create a functionality in a diagram, see "Creating a functionality component in a functionality map diagram", page 50.

To define the dependencies of sub-functionalities, see "Defining Functionality dependencies", page 51

Describing value streams

A value stream is an end-to-end collection of Value Stages that creates an outcome for a customer, who may be the ultimate customer or an internal end-user of the value stream.

For more details on the use of value streams, see the HOPEX Business Process Analysis guide, chapter "Value streams", page 73.

Accessing the list of value streams

To access the list of value streams from the **Business Architecture** navigation pane:

- Click **Inventories > Value Streams** in the navigation menu.
  The list of value streams appears in the edit area.

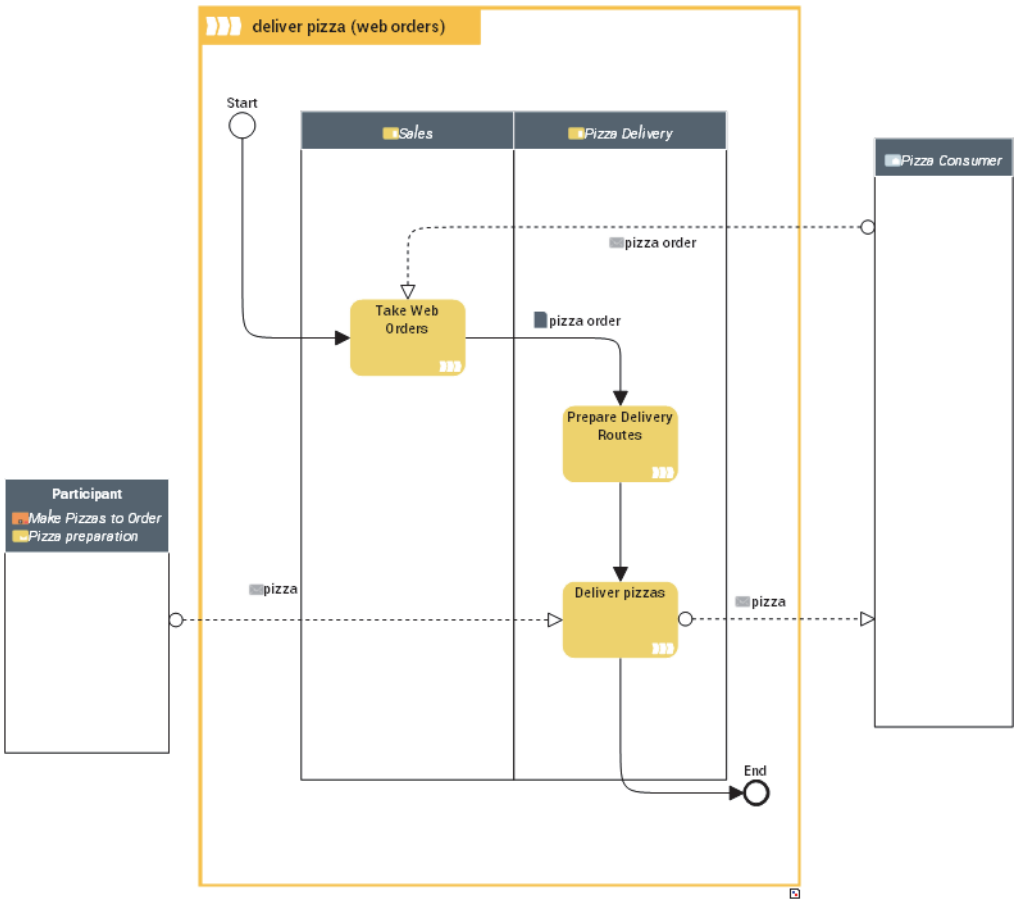
Creating a value stream diagram

To create a value stream diagram

- Right-click the value chains that interest you and click **New > Value Stream Diagram**.
  The diagram opens in the edit area. The frame of the value stream described appears in the diagram.
  You can construct this diagram in tabular input mode.

*Tabular input is available with the **HOPEX Web Front-End** module. For more information on using tabular input, see the "Entering a diagram in tabular mode" in the **HOPEX Common Features** guide.*

The following diagram presents an example of a value stream:



"Purchase reception" value stream

The purchase request is recorded and must then be approved. The requester is informed of the approval or rejection of the request. If the request is validated, an analysis of the required order is carried out.

If stock is lower than a given threshold, an order is prepared and sent to the supplier for resupply.

If the product is available, or as soon as it is received from the supplier, it is made available to the requester.

In this diagram, the *businesses* or the *business functional areas* that create the value streams are linked to the participants represented in columns.

Describing the outcomes

The outcomes of a business capability, a functionality, or a skill are represented by a content.

> 🕮 *The content designates the content of a message or an event, independent of its structure. This structure is represented by an XML schema linked to the content. A content may be used by several messages, since it is not associated with a sender and a destination. There can be only one content per message or event, but the same content can be used by several messages or events.*

The contents associated with the outcomes are used to describe the content of flows exchanged in the value streams, see "Describing value streams", page 53.

The outcomes are used to define the dependencies between:

- The business capabilities in the business capability maps, see "Defining business capability dependencies", page 32.
- The sub-functionalities in the functionality maps, see "Defining Functionality dependencies", page 51.
- The sub-skills in the skill maps, see "Defining the business skill dependencies", page 48.

Accessing the list of outcomes

To access the list of outcomes:

1. Expand the **Business Architecture** navigation pane.
2. Click **Inventories > Outcome**.
   The list of outcomes appears in the edit area.

The properties of an outcome

The **Characteristics** property page of the outcome provides access to:

- its **Owner**, by default on creation of the result, the current enterprise.
- its **Name**,
- the text of its **Description**.

Connecting an outcome to a business capability

An outcome can be used by a business capability or by an exhibited business capability. It appears in the **Desired Capability Effect** section of the **Characteristics** page of the capability property pages.

```
For example, the desired capability effect of "Delivery of
pizzas" is a "Delivered pizza"
```

To connect an existing outcome to a business capability, for example:

1. Open the property pages of the business capability that interests you.
2. Select the **Characteristics** page.
3. In the **Desired Capability Effect** section, click **New**.
   The **Creating a Desired Business Effect** window opens.
4. Select **Reusing an existing content**.
5. Select the content that interests you and click **OK**.
   The content appears in the list of **Desired Capability Effects**.

DESCRIBING COMPONENT IMPLEMENTATION

Creating a business capability map realization

To create a business architecture environment with a business capability map, you must create a business capability map realization.

> 🕮 *The creation of a business map represents the organization of physical agents (Application Systems) or logical (Business Function) agents that implements the business capacities of the map.*

To specify that an existing business capability map is implemented by a business functional area:

1. Open the property pages of the **Business architecture environment** that interests you.
2. Select the **Characteristics** page.
3. In the **Owned Realization** section, click **New**.
   The creation window for a business capability map opens.
4. Select **Reusing an existing Capability Map**.
5. Select the desired capability map and click **OK**.
   The business capability map realization appears in the list with the name of the selected map.

Creating a business capability realization

A business capability can be created either by a business function or by a business functional area.

To associate a business functional area or a business function with a capability, you must create a business capability realization.

> 🕮 *The creation of a business map represents the organization of physical agents (Application Systems) or logical (Business Function) agents that implements the business capacities of the map.*

To specify that an existing business capability is implemented by a business functional area:

1. Open the properties page of the business functional area that interests you.
2. Select the **Characteristics** page.
3. In the **Owned Realization** section, click **New**.
   The creation window for a business capability realization opens.
4. Select **Reusing an existing Capability**.
5. Select the desired capability and click **OK**.
   The capability realization appears in the list with the name of the selected capability.

> ☛ *From the business function property pages, you can specify if a business capability is performed by a business function.*

Analyzing enterprise capability implementation

Reports are used to display the realization capabilities by operational elements such as business functions, and according to different perspectives: Organizational, Business/Data, Logical/Physical Application, etc.

☛ *For more details on implementation reports for enterprise capabilities, see "Breakdown map of business capabilities", page 96.*

USING KPIS

KPIs and *KPI dimensions* are used to define the performance constraints that must be complied with by the building blocks making up the enterprise, at the forefront of which are the business capabilities and the exhibited business capabilities in an enterprise stage.

The nature of a *KPI* is defined by *KPI dimensions*.

> 🕮 *A KPI dimension expresses the nature of indicators (duration, mass, cost, etc.) and defines the unit used to measure them (minutes, kilograms, euros, etc.). KPI dimensions can be elementary or composite. Elementary dimensions are described by KPI units: kg, Liter, Gallon, Hour, Minute.*

> 🕮 *A KPI (key indicator) defines how much of something that can be quantified, either as a singular value or as range of values, according to a KPI Dimension. KPI are valued KPIs. Example: Response Time < 20 seconds.*

KPI dimensions can be connected to the following objects:

- business capabilities,
- architecture building blocks (driver, business function, value stream, application system, etc.).

> A KPI dimension for the "Delivery of pizzas" business capability is "Delivery time".

KPIs can be connected to exhibited business capabilities; that is, a capability highlighted within the context of an enterprise stage.

> For example, the KPIs of the "Delivery of pizzas" exhibition of the business capability (exhibited business capability) in a given enterprise stage (existing or future) can be "Deliver a pizza in less than 20mn" or "Take the order in less than 3mn".

Finally, *KPI* or *KPI dimensions* can be grouped to define *composite KPI* and *composite KPI dimensions*.

> 🕮 *A composite KPI defines the grouping of elementary KPIs that should be examined together in order to appreciate the performance of an item with KPI. E.g.: a delivery must take place in less than 20 minutes and cost less than 5 euros.*

> 🕮 *A composite KPI dimension consolidates a set of KPI dimensions that must be considered jointly to assess the performance of a tracked element. E.g: a delivery must take place within a target timeframe AND at target cost*

Describing a KPI dimension

> 🕮 *A KPI dimension expresses the nature of indicators (duration, mass, cost, etc.) and defines the unit used to measure them (minutes, kilograms, euros, etc.). KPI dimensions can be elementary or composite. Elementary dimensions are described by KPI units: kg, Liter, Gallon, Hour, Minute.*

Accessing the list of KPI dimensions

To access the list of *KPI dimensions*:

1. Expand the **Business Architecture** navigation pane.
2. Click **Inventories > KPI dimension**.
   The list of KPI dimensions appears.

Creating a KPI dimension

Creating a *KPI dimension*:

1. From the **Vision** navigation pane, select **Inventories > KPI dimension**.
2. Click **New**.
   The new KPI dimension appears in the list.
3. Open its property pages and enter:

- its **Name**,
- the text that describes its **Unit**,
- the text of its **Description**.

The properties of a KPI dimension

The **Characteristics** property page of the KPI dimension provides access to:

- its **Name**,
- the text that describes its **Unit**,
- the text of its **Description**.

The **Usage** property page of the KPI dimension provides access to:

- the **KPI** section: provides the list of KPIs that are based on this KPI dimension.

  ☛ *For more details, see "Connecting a KPI dimension to a KPI", page 60.*

- the **Composite KPI dimension**: provides the list of composite KPI dimensions that use the KPI dimension.

  ☛ *For more details, see "Creating a composite KPI dimension", page 61.*

Describing a key performance indicator - KPI

📖 *A composite KPI defines the grouping of elementary KPIs that should be examined together in order to appreciate the performance of an item with KPI. E.g.: a delivery must take place in less than 20 minutes and cost less than 5 euros.*

Accessing the list of KPIs

To access the list of KPIs:

1. Expand the **Business Architecture** navigation pane.
2. Click **Inventories > KPI**.
   The list of KPIs appears in the edit area.

Creating a KPI

☛ *You create a KPI from the KPI dimension page of all the objects that can be connected to simple or composite performance indicators.*

To create a *KPI* from the navigation tree:

1. From the **Business Function Architecture** navigation pane, select**Inventories > KPI**.
2. Click **New**.
   The KPI creation dialog box opens.
3. Select the **KPI dimension** that you would like to use.

   ```
   For example, "Delivery time"
   ```
4. Select the **operator** that you want to use (less than, greater than or equal to).

   ```
   For example, "Less than"
   ```
5. Specify the **Value**.

   ```
   For example, "30mn"
   ```
6. Click **OK**.
   The KPI is created with a **Name** calculated from the KPI characteristics.

   ```
   In the example, the name is "Delivery time < 30mn"
   ```

Connecting a KPI dimension to a KPI

The KPI dimension is mandatory on creation of a KPI; it is used in calculating the name of the KPI: ***dimension name*** + ***logical operator*** + ***dimension unit***.
The KPI dimension is given in the KPI property pages.

To connect a KPI dimension to a KPI:

1. Open the property pages of the KPI that interests you.
2. Select the **Characteristics** page.
3. In the **Dimension** field, specify the KPI dimension that interests you.

KPI properties

The **Characteristics** property page of the KPI dimension provides access to:

- its **Name**, which is calculated automatically on creation,
- Its **dimension**, which defines its nature,
- its **unit**, which is that of the KPI dimension and which cannot be modified,
- its **operator** which positions it with respect to its value,
- its **Value**,
- the text of its **Description**.

The **Usage** property page of the KPI provides access to:

- the **Composite KPI** section: provides the list of composite KPI that use the KPI described.

  ☛ *For more details, see "Creating a composite KPI", page 62.*
- the **Exhibited Capabilities** section: provides the list of exhibited capabilities connected to the KPI described.

  ☛ *For more details, see "Connecting a KPI to an exhibited business capability", page 61.*

Connecting a KPI to an exhibited business capability

> 🕮 *An exhibited business capability is measurable objectively within the framework of an enterprise stage, on a defined geopolitical scope (site), and focused on a given market segment (business partner).*
>
> ☛ *For more details on exhibited business capabilities, see "Managing exhibited business capabilities", page 80.*

A KPI can be used by an exhibited business capability. It appears in the **KPI** page of the property pages of the exhibited business capability.

To connect an existing KPI with an exhibited business capability:

1. Open the property pages of the exhibited business capability that interests you.
2. Select the **KPI** property page.
3. In the **KPI** section, click **Connect**.
   A connection window opens.
4. Select the KPI that interests you and click **Connect**.
   The KPI appears in the list.

Using a composite KPI

> 🕮 *A composite KPI defines the grouping of elementary KPIs that should be examined together in order to appreciate the performance of an item with KPI. E.g.: a delivery must take place in less than 20 minutes and cost less than 5 euros.*

Creating a composite KPI dimension

> 🕮 *A composite KPI dimension consolidates a set of KPI dimensions that must be considered jointly to assess the performance of a tracked element. E.g: a delivery must take place within a target timeframe AND at target cost*

A *Composite KPI Dimension* uses either a KPI dimension, or a composite KPI dimension.

A KPI dimension or a composite KPI dimension can be used by several composite KPI dimensions. During creation of a composite KPI dimension, you can thus reuse a KPI dimension, or a composite KPI dimension that already exists.

Creating a *Composite KPI Dimension*:

1. From the **Business Architecture** navigation pane, select **Inventories > Composite KPI dimension**.
2. Click **New**.
   The new composite KPI dimension appears in the list.
3. Open its property pages, select the **Characteristics** page and specify its **Name**.
4. Select the **Structure** page and click the **New** button.
   The composite KPI dimension creation window opens.
5. Select the **Reusing a composite KPI dimension or a KPI dimension** check box.

   > ☛ *For more details on creating the composite KPI dimension, see "Creating a composite KPI dimension", page 61.*
6. Select, for example, the **Connect a KPI dimension** check box.

7. Click **Display scope**.
   The list of KPI dimensions appears.
8. Select the KPI dimension concerned and click **OK**.
   The new component appears in the list.
9. Click **New** and proceed the same way to connect other KPI dimension or composite KPI dimension.

Linking a composite KPI dimension to an enterprise object

To connect, for example, a composite KPI dimension to a business capability:

1. Open the property pages of the business capability that interests you.
2. Select the **composite KPI dimension** page.
3. In the **composite KPI Dimension** section, click **Connect**.
   A connection window opens.
4. Select the composite KPI dimension that interests you and click **Connect**.
   The new composite KPI dimension appears in the list.

Creating a composite KPI

> 🕮 *A composite KPI defines the grouping of elementary KPIs that should be examined together in order to appreciate the performance of an item with KPI. E.g.: a delivery must take place in less than 20 minutes and cost less than 5 euros.*

A *Composite KPI* uses either a KPI, or a composite KPI.

A KPI or a composite KPI can be used by several KPI dimensions. During creation of a composite KPI, you can thus reuse a KPI, or a composite KPI that already exists.

Creating a *Composite KPI*:

1. From the **Business Architecture** navigation pane, select **Inventories > Composite KPI**.
2. Click **New**.
   The new composite KPI appears in the list.
3. Open its property pages, select the **Characteristics** page and specify its **Name**.
4. Select the **Structure** page and click the **New** button.
   The composite KPI creation window opens.
5. Select the **Reusing a composite KPI or a KPI** check box.
6. Select, for example, the **Connect a Composite KPI**.
7. Click **Display scope**.
   The list of composite KPI appears.
8. Select the composite KPI that interests you and click **OK**.
   The new component appears in the list.
9. Click **New** and proceed the same way to connect other KPI or composite KPI.

Connecting a composite KPI to an exhibited business capability

📖 *An exhibited business capability is measurable objectively within the framework of an enterprise stage, on a defined geopolitical scope (site), and focused on a given market segment (business partner).*

☛ *For more details on exhibited business capabilities, see "Managing exhibited business capabilities", page 80.*

A composite KPI can be used by an exhibited business capability. It appears in the **KPI** page of the property pages of the exhibited business capability.

☛ *To connect an existing composite KPI with an exhibited business capability: see "Connecting a KPI to an exhibited business capability", page 61.*

IDENTIFYING STRATEGIC TRANSFORMATION OBJECTIVES

After having described the current state and analyzing the suitability between the business capabilities of the enterprise and its business functions, this step consists in drawing up the list of drivers identified by the stakeholders and assessing them to establish the list of enterprise goals.

> 🕮 *A goal tends to be longer term, and defined qualitatively rather than quantitatively. It should be narrow-focused enough that goals can be defined for it.*

The following points are covered here :

HANDLING TRANSFORMATION DRIVERS

Stakeholders identify the drivers linked to the enterprise.

> 🕮 *A stakeholder is an internal or external person or person group with a defined role in the enterprise.*

There are various types of drivers:

> 🕮 *A business driver is an expectation expressed by a client, a partner or provider with respect to the enterprise.*
>
> 🕮 *A regulatory driver is guided by a change in the regulation framework to which it makes reference.*
>
> 🕮 *An architectural driver is guided by a specific characteristic or an internal architectural building block. This characteristic can represent a strength or a weakness*

Using drivers

Accessing the list of drivers

To access the list of drivers from the **Vision** navigation pane:

❱ Click **Inventories > Drivers** in the navigation menu.
Three tabs are available to access the list of each type of driver.

> 🕮 *A business driver is an expectation expressed by a client, a partner or provider with respect to the enterprise.*
>
> 🕮 *A regulatory driver is guided by a change in the regulation framework to which it makes reference.*
>
> 🕮 *An architectural driver is guided by a specific characteristic or an internal architectural building block. This characteristic can represent a strength or a weakness*

Creating a driver

The drivers are linked to the current enterprise.

To create a driver:

1. From the **Vision** navigation pane, select **Inventories > Drivers**.
2. Select the tab that corresponds to the driver type that you wish to create and click **New**.
   The driver appears in the list of drivers linked to the enterprise.
3. You can modify the **Name** of the driver.

Driver properties

The **Characteristics** property page of the driver provides access to:

- its **Name**;
- the text of its **Description**.

With **HOPEX Business Architecture**, a driver is described in the following pages:

- the **Structure** page, **Driving Enterprise Model Element** section is used to access the architectural building blocks concerned by the driver.

  ☛ *For more details on transformation plans, see "Describing implementation of an enterprise stage", page 84.*

- the **Structure** page, **Possible Sites** section is used to access the sites concerned by the driver.

  📖 *A site is a geographical location of an enterprise. Examples: Boston subsidiary, Seattle plant, and more generally the headquarters, subsidiaries, plants, warehouses, etc.*

- the **Usage** page, **Strategy Assessment** section, provides access to the strategic assessments to which the driver is connected.

  ☛ *For more details on assessing strategies, see "Using strategy assessments", page 68.*

- the **Usage** page, **Transformation Goal** section, provides access to the goals to which the driver is connected.

  ☛ *For more details on enterprise goals, see "Identifying enterprise goals", page 73.*

- the **KPI Dimension** page is used to create KPI Dimensions for the driver.

  ☛ *For more details on KPIs, see "Using KPIs", page 59.*

- the **Assignment** page is used to specify the stakeholders connected to the driver; these links can be examined via all the "Driver x Stakeholder Matrix", page 104 report data.

USING STRATEGY ASSESSMENTS

With **HOPEX Business Architecture**, the assessment of drivers is of **SWOT** type: Strengths, Weaknesses, Opportunities, Threats. It is accessible within the context of a specific *strategy assessment* and at a given date.

The results of the risk assessment can be displayed in dedicated reports which make it easier to analyze the results.

Using strategy assessments

Creating a strategy assessment

To create a *strategy assessment*:

1. From the **Vision** navigation pane, select **Motivation > Strategy Assessment**.
   The current enterprise appears. It is connected to a **Strategy Assessment** folder.
2. Right-click the **Strategy Assessment** folder and select **New > Strategy Assessment**.
   The strategy assessment creation window opens.
3. Specify the **Name** of the strategy assessment.
4. Specify the **Begin Date** and the **End Date** of the assessment.
5. Click **OK**.
   The strategy assessment appears in the list of assessments associated with the enterprise.

The properties of a strategy assessment

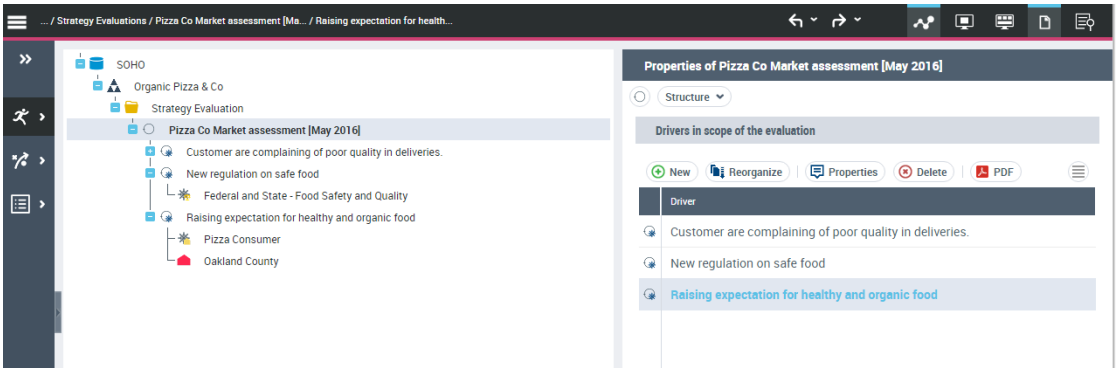
The **Characteristics** properties page of the strategy assessment provides access to:

- its **Name**;
- its **Enterprise**, the enterprise from which the assessment was created;
- the **Begin Date** and the **End Date** of the assessment.
- the text of its **Description**.

With **HOPEX Business Architecture**, a strategy assessment is described in the following pages:

- the **Structure** page is used to access all drivers linked to the strategy assessment,

  ☛ *For more details on drivers, see "Connecting a driver to a strategy assessment", page 69.*



- the **Assessment** tab is used to create assessments.

  ☛ *For more details on assessing strategies, see "Using strategy assessments", page 68.*

Connecting a driver to a strategy assessment

The drivers are linked to the current enterprise.

To link a *driver* to a *strategy assessment*

1. Open the **Structure** properties page of the strategy assessment that interests you.
   The list of drivers associated with the assessment appears.
2. Click the **New** button.
   A strategy evaluation driver creation window opens.
3. Select the **Reusing a Regulatory Driver or Business Driver or Architectural Driver** check box.
4. Select, for example, the **Connect a Regulatory Driver** check box.
5. Click **Display scope**.
6. Select the driver that interests you.
7. Click **OK**.
   The driver appears in the list of drivers linked to the strategy assessment.

Creating an assessment for a transformation strategy

You can create new assessments with the aim of globally assessing each driver connected to a strategy assessment.

To create a strategy assessment:

1. Open the **Structure** properties page of the strategy assessment that interests you.
   The list of drivers associated with the assessment appears.

2. Click the **New Assessment** button.
   The list of drivers associated with the strategy assessment appears.
3. For each driver, specify the **SWOT Quadrant** by selecting:
   - **Strength** or **Weakness** for an internal driver,
   - **Opportunity** or **Threat** for an external driver.
4. For each driver, fill in the **SWOT Quadrant Level** column by selecting **High**, **Medium**, or **Low** to specify the relative important of each driver from the same quadrant.
5. Click the **Validate Assessment** button.
   A validation window opens.
6. Specify the assessment date and click **OK**.

☛ *The SWOT dial at the bottom of the page is updated. See also:* *"Consulting the answers of a driver assessment", page 70*.

Consulting the answers of a driver assessment

The **SWOT** quadrant (Strengths, Weaknesses, Opportunities, Threats) is presented on the priorities page of the strategy assessment.

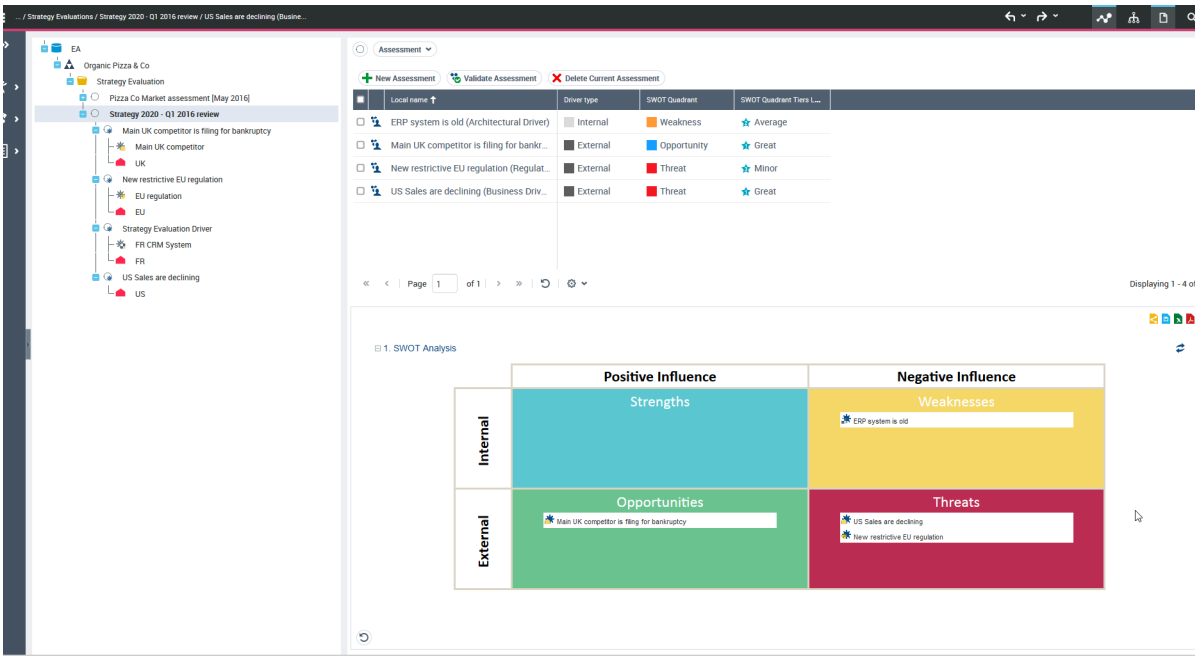
The top line of the quadrant presents the distribution of the internal drivers.

- the **Positive influence** section draws up the list of internal drivers assessed as **Strengths**.
- the **Negative influence** section draws up the list of internal drivers assessed as **Weaknesses**.

The lower line of the quadrant presents the distribution of external drivers.

- the **Positive Influence** section draws up the list of external drivers assessed as **Opportunities**.
- the **Negative Influence** section draws up the list of external drivers assessed as **Threats**.

> ☛ *For more details on establishing this report, see "Creating an assessment for a transformation strategy", page 69.*



To access the SWOT quadrants for the strategy assessments that you have created from the **Vision** navigation pane:

❱ Select **Inventories > My SWOT Analysis Reports** .

> ☛ *For more details on establishing this report, see "SWOT analysis", page 102.*

DEFINING THE TRANSFORMATION STRATEGIC ELEMENTS

This step consists of preparing the *enterprise stages* that are used to respond to the transformation drivers.

> 🕮 *An enterprise stage is a past, current or future stage of an enterprise.*

Strategic elements are classified in the following categories:

- Ends, see: "Identifying the transformation ends", page 73,
- Means, see: "Defining Means", page 74.
- the exhibited business capabilities, see: "Managing exhibited business capabilities", page 80.

Accessing to the strategic elements

Strategic elements are accessible from the **Strategy** page of the properties page of an enterprise or an enterprise phase.

However, they can also be managed in the navigation pane or via a dedicated interface.

Accessing strategic elements from the navigation pane

To access all the strategic elements of an enterprise from the navigation pane:

1. Select the **Vision** navigation pane.
2. Select **Strategic Planning > Enterprise Strategic View**.
3. Expand the enterprise folder that interests you.
4. Expand the folder **Strategic View**.

Managing the strategic elements tree

A dedicated interface enables you to manage the strategic elements of an enterprise or an enterprise stage from an edit area.

To access this interface:

1. Select the enterprise or the enterprise stage that interests you and click **OK**.
   A window opens in the edit area.
2. Expand the section relating to the Gantt diagram.
3. Expand the **Structure** section.
   A window opens in the edit area. The enterprise, the enterprise stages and enterprise sub-stages appear in the form of a tree. Buttons are available in a column to manage the strategic elements consistently.

Identifying the transformation ends

The strategy ends are defined by the *visions* and the *enterprise goals* to be reached.

The elements describing the ends are aligned with components describing the necessary means: Missions, Strategies and Tactics.

☛ *For more details on means, see "Defining Means", page 74.*

Describing the Enterprise Vision

🕮 *A data technical area represents an organizational element of an application used to access the data necessary for the operation of this application. Each application technical area is associated with one or more technologies (E.g.: Oracle 12, SQL Server 2012, etc.). A data technical area can allow access to one or more data stores.*

Creating an Enterprise Vision

To create an *enterprise vision*:

1. In the properties pages of an enterprise, select the **Strategy** page.
2. In the **Ends** section, select the **Vision** tab.
3. Click **New**.
   The **Creation of a vision** dialog box opens.
4. Specify the vision name and click the **OK** button.
   The new vision appears in the list.

Vision properties

The **Characteristics** property page of the vision provides access to:

- its **Name**,
- its **Owner**, by default the current enterprise.
- the text of its **Description**.

Identifying enterprise goals

The *enterprise goals* are determining elements in your enterprise model since they interconnect the ends of the enterprise strategy, the means and the operational elements.

🕮 *A transformation objective is the expression of a realistic target, measurable and with a time limit, which the enterprise pursues to reach the goals it has set.*

Creating enterprise goals

To create an *enterprise goal*:

1. In the properties window of an enterprise, select the **Strategy** page.
2. In the **Ends** section, select the **Enterprise Goal** tab.
3. Click **New**.
   The **Creation of an Enterprise Goal** dialog box opens.
4. Specify the goal name and click **OK**.
   The goal appears in the list.

Enterprise goal properties

The **Characteristics** page of the property pages of an enterprise goal is used to access:

- its **Owner**, by default the current enterprise.
- its **Name**,
- the text of its **Description**.
- the **Supported Visions** section, which specifies the **visions** connected to the enterprise goal.

  ☛ *For more details on drivers, see "Describing the Enterprise Vision", page 73.*
- the **Drivers Concerned** section, which specifies the **drivers** connected to the enterprise goal.

  ☛ *For more details on drivers, see "Using drivers", page 66.*

With **HOPEX Business Architecture**, an enterprise goal is described in the following pages:

- the **Structure** page, which provides access to the list of exhibited business capabilities linked to the enterprise goal.

  ☛ *For more details on exhibited business capabilities, see "Managing exhibited business capabilities", page 80.*
- The **Contribution and Refinement** page, which provides access to the list of means used.

  ☛ *For more details on strategies, see "Defining Means", page 74.*

Defining Means

To ensure that the strategies and tactics implemented in the enterprise correspond to the enterprise goals, you can use **HOPEX Business Architecture** to align the objects representing the ends of the strategy with the means to be implemented.

The means of the enterprise are divided into *strategies*, which themselves are broken down into *tactics* to be implemented.

📖 *A strategy is a component of a mission. It represents a means of action essential to achievement of ends of the enterprise, and more practically its goals. A strategy channels enterprise efforts towards these goals. A strategy is the approach considered by the enterprise as being the best suited to achieving its goals, taking account of constraints imposed by the environment and by risks.*

📖 *A tactic is a course of action that implements part of the detailing of strategy. A tactic contributes to a strategy implementation.*

To check the consistency of the transformation plan, components describing the ends are connected to components describing the means of achieving these:

- enterprise goals are connected to strategies,
- strategies are connected to tactics.

Defining Strategies

📖 *A strategy is a component of a mission. It represents a means of action essential to achievement of ends of the enterprise, and more practically its goals. A strategy channels enterprise efforts towards*

these goals. A strategy is the approach considered by the enterprise as being the best suited to achieving its goals, taking account of constraints imposed by the environment and by risks.

Creating strategies

To create a *strategy*:

1. In the properties pages of an enterprise, select the **Strategy** page.
2. In the **Means** section, select the **Strategy** tab.
3. Click **New**.
   The **Creation of a strategy** dialog box opens.
4. Specify the strategy and click the **OK** button.
   The new strategy appears in the list.

Strategy properties

The **Characteristics** property page of the strategy provides access to:

- its **Owner**, by default the current enterprise.
- its **Name**,
- the text of its **Description**.
- the list of **Missions supported**.

☛ *For more details on missions, see "Defining a Mission", page 76.*

With **HOPEX Business Architecture**, a strategy is described by the **Analysis of Ends and Means** page, which provides access to the list of tactics that participate in strategy implementation.

☛ *For more details on ends, see "Identifying the transformation ends", page 73.*

☛ *For more details on means, see "Defining Means", page 74.*

Defining Tactics

📖 *A tactic is a course of action that implements part of the detailing of strategy. A tactic contributes to a strategy implementation.*

Creating tactics

To create a *tactic*:

1. In the properties pages of an enterprise, select the **Strategy** page.
2. In the **Means** section, select the **Tactic** tab.
3. Click **New**.
   The **Creation of a tactic** dialog box opens.
4. Specify the name of the tactic.
5. Select the **Parent Strategy** that the tactic implements.
6. Click **OK**.
   The new tactic appears in the list.

Tactic properties

The **Characteristics** property page of the tactic provides access to:

- its **Owner**, by default the current enterprise.
- its **Name**,
- the text of its **Description**.
- The list of **supported strategies** that it implements.

☛ *For more details on means, see "Defining Strategies", page 74.*

With **HOPEX Business Architecture** a tactic is described by:

- the **Ends Support & Means Refinement** page, which provides access to the list of tactics that participate in the strategy implementation.

☛ *For more details on ends, see "Identifying the transformation ends", page 73.*

☛ *For more details on means, see "Defining Means", page 74.*

- the **Capabilities Required** page used to access the list of exhibited business capabilities linked to the transformation tactic.

☛ *For more details on exhibited capabilities, see "Managing exhibited business capabilities", page 80.*

Defining a Mission

🕮 *The mission describes what the business is or will be doing on a day-to-day basis. A mission makes a vision operative; that is, it indicates the ongoing activity that makes the vision a reality. A mission is planned using strategies.*

Creating an Enterprise Mission

To create an *enterprise mission*:

1. In the properties pages of an enterprise, select the **Strategy** page.
2. In the **Means** section, select the **Mission** tab.
3. Click **New**.
   The **Creation of a mission** dialog box opens.
4. Specify the name of the mission and click **OK**.
   The new mission appears in the list.

Mission properties

The **Characteristics** property page of the mission provides access to:

- its **Name**,
- its **Owner**, by default the current enterprise.
- the text of its **Description**.

With **HOPEX Business Architecture**, a mission is described by the **Analysis of Ends and Means** page used to access the list of tactics that participate in the strategy implementation.

☛ *For more details on ends, see "Identifying the transformation ends", page 73.*

DESCRIBING THE TARGET BUSINESS CAPABILITY MAP

The implementation of an *enterprise* is described by the enterprise stages that correspond to its state at a given time.

> 🕮 *An enterprise is a purposeful undertaking, an effort conducted by one or more organizations, aiming at delivering goods and services, in accordance with the enterprise mission in its changing environment. In the course of its development, the enterprise must adapt to its environment and establish the transformation objectives and goals to be achieved as well as the strategic action plans used to achieve these objectives. The development and achievement of the different adaptation and transformation stages can lead to a modification of the organization's boundaries. This requires the implementation of an integrated team, under the responsibility of a governing body, to involve the stakeholders in the transformation.*

Thus, when the functional administrator creates an enterprise, the following two *enterprise stages* are automatically created:

- The current ('As-Is') stage that concerns existing elements;
- The target 'To-Be' phase that contains the target elements determined by the review of the transformation strategic objects.

> 🕮 *An enterprise stage is a past, current or future stage of an enterprise.*

The *business capabilities* valid for the given enterprise are contained in a *business capability map*.

> 🕮 *A business capability map is a set of business capabilities with their dependencies that, together, define a framework for an enterprise stage.*

The target business capability map thus describes the architecture that meets the transformation goals of the enterprise. The target map is thus made up of the business capabilities associated with the "As-Is" phase and the business capabilities resulting from the analysis of associated goals and means.

Connecting the capability map to an enterprise stage

> ☛ *For more details on the list of business capabilities, see "Building the business capability map", page 30.*

To connect a business capability map to an enterprise stage:

1. Select the **Architecture Description** properties page of the enterprise stage that interests you.
2. In the **Capability Architecture** section, click the right arrow of the **Business Capability Map** field and select **Connect Business Capability Map**.
   A selection window opens.
3. Select the business capability that interests you and click **Connect**.
   The business capability map is connected to the enterprise stage.

Using business capability maps

The assessment of business capability maps deals with the following characteristics:

- the business value,
- capability effectiveness,
- capability efficiency,
- financial impact.

The assessment of a business capability map is accessible using the enterprise stages to which the map is connected. This assessment is therefore valid in the context of the enterprise stage and at a given date.

The results of the business capability map assessment are displayed in dedicated reports which make it easier to analyze the results.

Creating an assessment of business capability maps

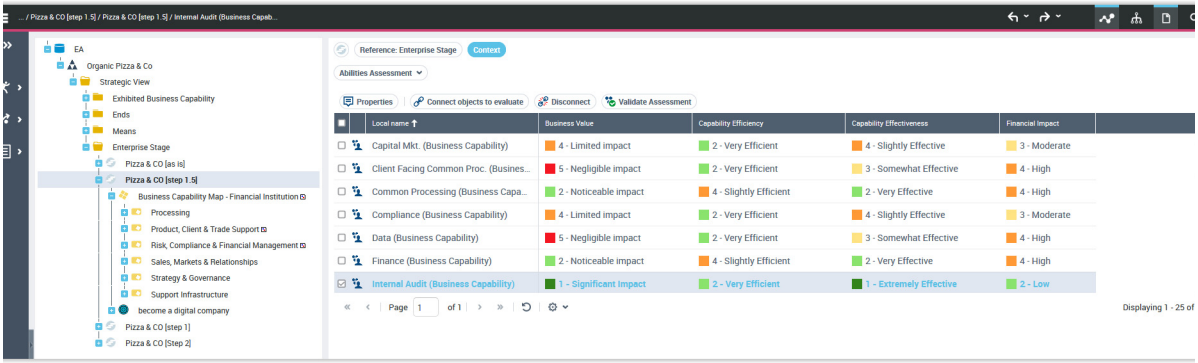
You can create new assessment with a view to assessing each business capability connected to the business capability map using an enterprise or an enterprise stage.

To create an assessment:

1. Open the **Capability Assessment** properties page for the enterprise stage that interests you.

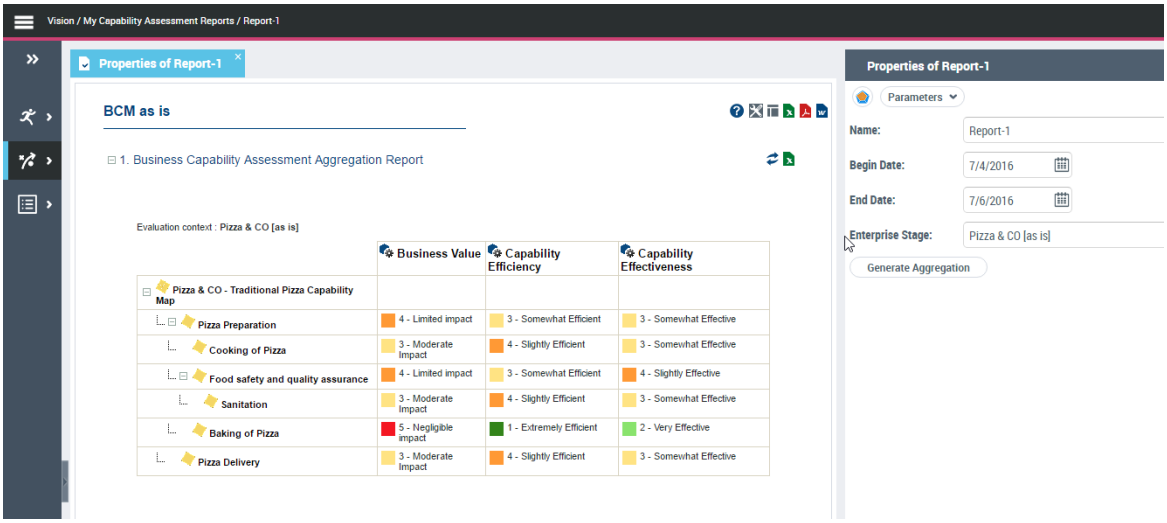
   ☛ *The enterprise stage must be linked to a business capability map; see "Connecting the capability map to an enterprise stage", page 77.*
2. Click the **New Assessment** button.
   A selection window presents the business capability map connected to the enterprise stage.
3. Select the business capability that you want to assess and click **OK**.
   The selected capabilities appear in the property page.
4. For each business capability, fill in the columns corresponding to the assessment characteristics.
   - the business value,
   - capability effectiveness,
   - capability efficiency,
   - financial impact.
5. Click the **Validate Assessment** button.
   A validation window opens.

6. Define the Evaluation date and click **OK**.



Consulting the assessment results of business capability maps

A report provides access to the assessment results of the business capabilities connected to the enterprise stage; see "Capability assessment report", page 108.



Building the target business capability map

The target business capability map is connected to the "To-Be" enterprise stage. It is created using the business capability map of the existing architecture.

To facilitate construction of a new business capability map, you can duplicate an existing capability map.

Duplicating a business capability map

To duplicate a *business capability map*:

1. Select the **Vision** navigation pane.
2. Select **Inventories > Business Capability Maps**.
   The list of business capability maps of the current enterprise appears.
3. Select the business capabilities you want to duplicate and click **Delete**.
   The new business capability map appears in the list. It contains the business capability components that are linked to the same business capabilities as the initial map.

> ☛ *You can associate business capabilities with components from the business capacity map; see "Modifying the business capability referenced in a business capability map", page 80.*

Duplicating a business capability

If, in your target capability map, you want to use an existing business capability with new characteristics, you can duplicate the existing business capability.

To duplicate a *business capability*:

1. Select the **Vision** navigation pane.
2. Select **Inventories > Business Capabilities**.
   The list of business capabilities of the current enterprise appears.
3. Select the business capability you want to duplicate and click **Duplicate**.
   The new business capability appears in the list. You can, for example, link it to new performance indicators.

> ☛ *For more details on performance indicators, see "Using KPIs", page 59.*

Modifying the business capability referenced in a business capability map

In your target capability map, you can use a duplicated business capability instead of an existing business capability. You thus preserve the dependency links between the two business capability components:

To modify a *business capability* referenced in a business capability map:

1. Select the business capability component concerned to open its **Characteristics** properties pages.
2. In the **Business Capability Used**, select **Connect Business Capability**.
3. Select the business capability that interests you and click **OK**.

Managing exhibited business capabilities

> 🕮 *An exhibited business capability is measurable objectively within the framework of an enterprise stage, on a defined geopolitical scope (site), and focused on a given market segment (business partner).*

Creating an exhibited business capability

To create an *exhibited business capability* from an enterprise or an enterprise stage:

1. Open the properties pages of the enterprise or the enterprise stage and select the **Strategy** page.
2. In the **Exhibited Business Capability** section, click **New**.
   The window for adding a business capability opens.
3. Select, for example, the **Reusing an Existing Business Capability** check box.
4. Click **Display Scope** to limit the list of business capabilities to those in the scope of the enterprise.
5. Select the business capability that interests you and click **OK**.
   The new exhibited business capability appears in the list of **Exhibited Business Capabilities** of the enterprise.

The properties of an exhibited business capability

The **Characteristics** property page of the exhibited business capability provides access to:

- its **Owner**, used to provide access to the enterprise linked to the exhibited business capability,
- its **Name**,
- **Desired Capability Effect**, provides access to the exhibited business capability outcomes.

An exhibited business capability is described by the following pages:

- the **Structure** page specifies a part of the list of business capability components that constitute the exhibited business capability, as well as the dependencies between these components,

  ☛ *For more information on the components of business capabilities, see "Using the capability compositions", page 32and "Defining business capability dependencies", page 32.*

- The **Implementation** page provides access to the list of business functional areas or solution building blocks that implement the capability map.

  ☛ *For more details on implementation of business capabilities, see "Creating a business capability map realization", page 57.*

- The **KPI** page provides access to the list of KPI and composite KPI associated with the exhibited business capability.

  ☛ *For more details on KPIs, see "Using KPIs", page 59.*

- The **Use** page provides access to the tactics to which the capability is connected as well as the expected results.

DRAWING UP THE ROADMAP

The roadmap is used to plan the business capabilities that the enterprise must acquire to reach its strategic objectives. The changes in these business capabilities over time takes place through *exhibited business capabilities*.

> 🕮 *An exhibited business capability is measurable objectively within the framework of an enterprise stage, on a defined geopolitical scope (site), and focused on a given market segment (business partner).*

Drawing up the roadmap consists of identifying the enterprise *transformation phases* that define the timeframe of the transformation goals resulting from the analysis step of the transformation drivers.

> 🕮 *An enterprise stage is a past, current or future stage of an enterprise.*

This chapter describes the procedures to be followed to:

- ✓ "Describing implementation of an enterprise stage", page 84,
- ✓ "Defining enterprise stages", page 87,
- ✓ "Representing the strategy and the roadmaps", page 91.

DESCRIBING IMPLEMENTATION OF AN ENTERPRISE STAGE

The implementation of an enterprise is described by the enterprise stages that correspond to its state at a given time.

An enterprise stage is connected to enterprise sub-stages that describe the intermediate steps necessary to reach an enterprise goal. Each enterprise sub-stage is associated with a IT, or business, transformation stage.

An enterprise goal is defined by a number of components that represent implementation of the solution. This consists of:

- the business capability map;

  A business capability map is a set of business capabilities with their dependencies that, together, define a framework for an enterprise stage.

  ☛ *For more details on how to associate a business capability with an enterprise stage, see "Connecting the capability map to an enterprise stage", page 77.*

- the business architecture environment;
- the solution building block environments.

  ☛ *For more details on how to access this information from the properties page of an enterprise stage, see "Enterprise stage properties", page 88.*

Describing the business architecture environment

The business architecture environment contains the elements that define the enterprise model (operational model) for the current stage.

A business architecture environment represents the relationships of a business functional area with its partners.

☛ *For more details on the managing the business architecture environment, see "Managing a business architecture environment", page 38.*

The elements constituting the enterprise operational model are:

- the enterprise ecosystem defined by the interactions with the partners,
- the business function architectures,
- the business functions.

To describe the business architecture environment for an enterprise stage:

1. Open the **Architecture Description** properties page of the enterprise phase.
2. In the **Functional Architecture** section, click the right arrow of the **Operational Model** field.
3. Click **Connect a business architecture environment**.
   A selection window opens.

4. Select the business environment architecture that interests you and click **Connect**.
   The business architecture environment is connected to the enterprise stage.

Describing physical solutions

The possibilities to describe physical solution depend on the product licenses that you have, for example:

- with **HOPEX System Oriented IT Architecture**, you have access to the Logical Application System Environments as well as to Application System Environments.
- with **HOPEX IT Architecture**, you have access to Resource Architecture Environments, for example.

The components of the application architecture

All application architecture components are accessible with the **HOPEX IT Architecture** and **HOPEX System Oriented IT Architecture** product licenses.

To access all the application components available to you depending on the product licenses that you have:

- From the **Application architecture** navigation pane, select **Inventories**.
  The list of application architecture building block types available appears.

The components of the technical architecture

The components of the technical architecture are accessible with the **HOPEX IT Architecture** product license.

To access all the technical architecture components available to you depending on the product licenses that you have:

- From the **Technical architecture** navigation pane, select **Inventories**.
  The list of technical architecture building block types available appear.

Connect the solution building blocks to an enterprise stage

To connect technical or application architecture building blocks to an enterprise stage:

1. Open the **Architecture Description** properties page of the enterprise phase.
2. In the **Functional Architecture** section, click **Connect**.
   A selection window opens.

3. Select the environment type concerned and click **Find**.

   A business architecture environment represents the relationships of a business functional area with its partners.

   A resource architecture is the combination of physical and organizational assets configured to supply a capability.

   An application system environment allows presenting the other application systems, applications or micro-services with which this application system can interact.

   A logical application system environment presents a logical application system use context. It describes the interactions between the logical application system and its external partners, which allows it to fulfill its mission and ensure the expected functionalities.

4. Select the environment that interests you and click **Connect**.
   The environment is connected to the enterprise stage as well as to all the building blocks that it comprises.

DEFINING ENTERPRISE STAGES

With an enterprise, you can define enterprise stages that can themselves be divided into enterprise sub-stages.

Each enterprise sub-stage is positioned in the main enterprise according to the main enterprise events, in order to define the transformation roadmap for the enterprise underway.

> 🕮 *An enterprise stage is a past, current or future stage of an enterprise.*

Building an Enterprise stage

> 🕮 *An enterprise stage is a past, current or future stage of an enterprise.*

An enterprise stage is connected to a *business transformation stage* or to an *IT transformation stage*.

> 🕮 *A business transformation stage is a kind of enterprise transformation stage aiming at the alignment of the enterprise operating model to its strategy and corresponding exhibited business capabilities.*
>
> 🕮 *An IT transformation stage is an enterprise transformation stage aimed at aligning the enterprise IT system with the functionalities expected by the operations.*

The type of the transformation stage that characterizes the enterprise stage is defined during creation of the enterprise stage.

Creating an Enterprise Stage

During creation of an enterprise stage, you can reuse a transformation stage that already exists or create a new one.

To create an *enterprise stage* from the **Vision** navigation pane:

1. Select **Strategic Planning > Enterprise Strategic View**.
   The current enterprise appears. It is connected to a **Strategic view** folder.
2. Expand the folder **Strategic View**.
3. Right-click the **Enterprise stage** folder and select **New > Enterprise stage component**.
   An enterprise sub-stage creation dialog box opens.
4. Select, for example, the **Create an IT Transformation Stage**.
5. Specify the **Name** of the enterprise sub-stage and click **Add**.
   A IT transformation stage creation dialog box opens.
6. In the **Start event** section, select **Create a new event** to create the event that marks the start date of the enterprise.
7. In the **End event** section, select the **Use an existing event** check box.

8. Click the arrow to the right of the frame and select the event that interests you from the drop-down list.

   ☛ *For more details on events, see "Managing enterprise events", page 89.*

9. Select the **Period**.
10. Click **OK**.

Enterprise stage characteristics

The characteristics of an enterprise stage, an enterprise and a transformation stage are identical.

The **Characteristics** property page of an enterprise stage provides access to the following information:

- **Name**,
- **Owner**, the current enterprise for an enterprise stage or a transformation stage,
- the **Start event** of the enterprise or the stage,
- the **End event** of the enterprise or the stage,
- the **Description** text.

Enterprise stage properties

The properties of an enterprise stage, an enterprise and a transformation stage are identical.

With **HOPEX Business Architecture**, an enterprise stage is described by:

- A **Characteristics** page.

  ☛ *For more details on enterprise stages, see "Enterprise stage characteristics", page 88*

- In the **Structure** page, the **Enterprise sub-stage** section is used to describe the enterprise sub-stages that define the enterprise stage described.

  ☛ *For more details on enterprise sub-stages, see "Creating an Enterprise Stage", page 87*

- In the **Structure** page, the **Mean**, **End** and **Exhibited business capability** sections are used to access the strategic components of the transformation stage.

  ☛ *For more details on strategic elements, see "Defining the transformation strategic elements", page 72.*

- The **Implementation** page provides access to the components that define the enterprise stage.

  ☛ *For more details on implementation of a transformation plan, see "Describing implementation of an enterprise stage", page 84.*

- The **Usage** page provides access to the enterprise stages that use the transformation stage described.

  ☛ *For more details on enterprise sub-stages, see "Managing enterprise events", page 89*

- The **Gantt view** page provides access to the scheduling representation.

  ☛ *For more details on Gantt diagrams, see "Using Gantt Charts", page 91.*

- The **Capability assessment** page provides access to the assessment facilities in an enterprise stage.

  ☛ *For more details on assessing capability maps, see "Using business capability maps", page 78.*

Managing enterprise events

📖 *An event represents a fact or an action occurring in the system, such as updating client information. It is managed by a broker. An application indicates that it can produce the event by declaring that it publishes it. If an application is interested in an event, it declares that it subscribes to the event.*

Accessing the list of events

To access the list of events from the **Vision** navigation pane:

1. Click **Inventories > Enterprise events**.
   The list of events appears.

Enterprise event properties

The **Characteristics** page of the properties window of an enterprise event is used to access:

- its **Name**,
- its **Owner**, by default the current enterprise.
- The **Event date**,
- The **Event period**,
- the text of its **Description**.

With **HOPEX Business Architecture**, an enterprise event is described by the **Use** page in the following sections:

- **Enterprise stages started**,
- **Enterprise stages ended**,

☛ *For more details on enterprise stages, see "Defining enterprise stages", page 87*

Creating an enterprise event from the navigation pane

To create an *enterprise event* from the **Vision** navigation pane:

1. Click **Inventories > Enterprise events**.
   The list of events appears.
2. Click **New**.
   An enterprise event creation dialog box opens.
3. Specify the **Period** of the event,
4. Specify the **Date of the event**,
5. Click **OK**.

REPRESENTING THE STRATEGY AND THE ROADMAPS

A number of facilities are available to display and analyze the strategy and its deployment.

Using Gantt Charts

From an enterprise or an enterprise stage, you can define enterprise sub-stages. Each enterprise sub-stage is positioned in the main enterprise according to the main enterprise events, in order to define the transformation roadmap for the enterprise underway.

☛ *For more details on enterprise stages, see "Defining enterprise stages", page 87*

The transformation schedule is presented in the form of a Gantt chart; see "Gantt report", page 106.

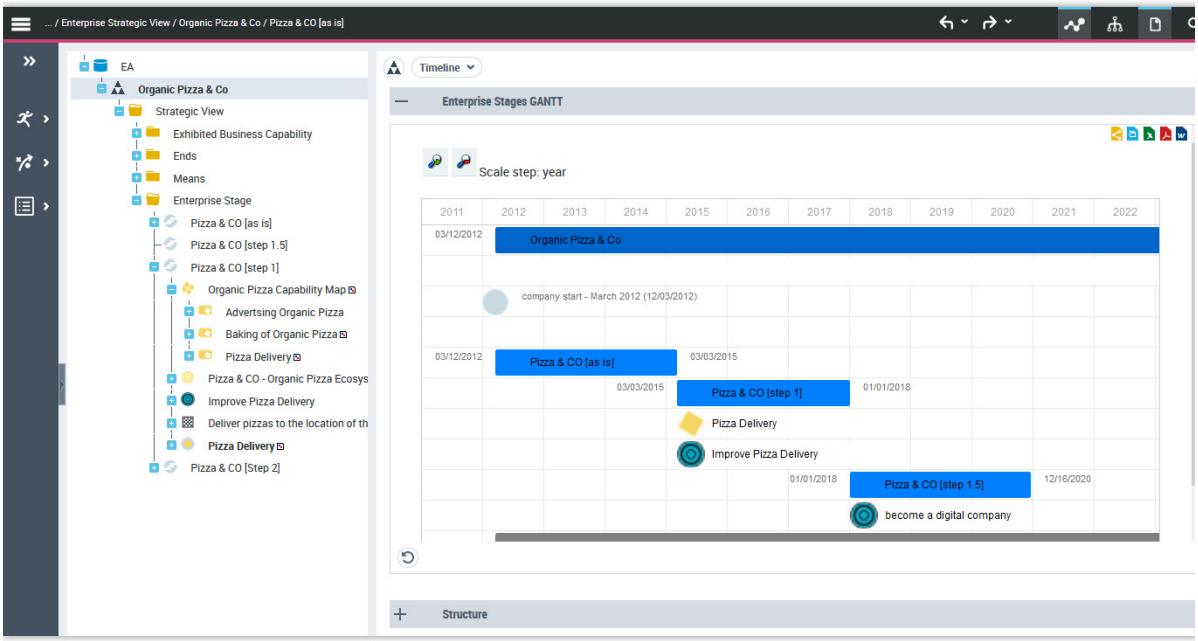


Diagram objects

The dates of the enterprise stage are represented in columns, the stage components and its sub-stage are in rows.

For each stage and sub-stage, the components represented are:

- the exhibited business capability,
- the enterprise goals.

☛ *For more details on strategic elements, see "Defining the transformation strategic elements", page 72.*

Zoom functions

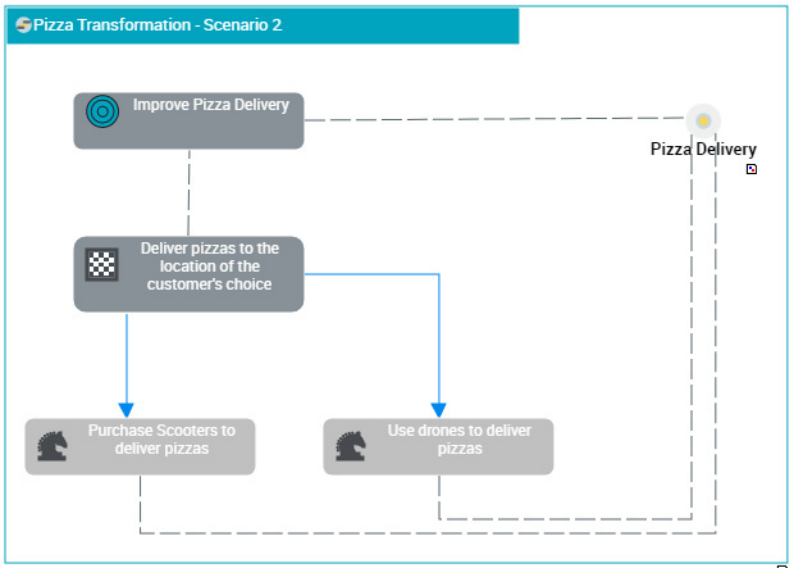
The zoom functions at the top of the chart are used to customize the graphic display.

Zoom in on calendar

Zoom out

Building an enterprise stage strategy diagram

Use the enterprise stage strategy diagram to describe the links between missions, goals, strategies, tactics and exhibited business capabilities.



☛ *For more details on the elements of this diagram, see "Defining the transformation strategic elements", page 72.*

Creating an enterprise stage strategy diagram

To create an enterprise stage strategy diagram:

1. From the **Vision** navigation pane, select **Strategic planning > Enterprise Architecture View**.
   The architecture view tree associated with the enterprise appears.
2. Expand the **Architecture View** and **Enterprise Stages** folders.
   The list of enterprise stages appears.

   ☛ *You can also access the list of enterprise stages using the **Vision > Strategic View > Enterprise Phase** navigation pane.*
3. Select the enterprise stage concerned and click **New > Enterprise Stage Strategy Diagram**.
   The diagram opens in the edit area. The frame of the enterprise stage described appears in the diagram.

Describing the strategic elements

The components represented in an enterprise stage strategy diagram are strategic elements.

☛ *For more details on strategic elements, see "Defining the transformation strategic elements", page 72.*

The strategic elements presented are ranked by category.

- The ends; see "Identifying the transformation ends", page 73,

  🕮 *A data technical area represents an organizational element of an application used to access the data necessary for the operation of this application. Each application technical area is associated with one or more technologies (E.g.: Oracle 12, SQL Server 2012, etc.). A data technical area can allow access to one or more data stores.*

  🕮 *A transformation objective is the expression of a realistic target, measurable and with a time limit, which the enterprise pursues to reach the goals it has set.*
- The means of the enterprise, which are divided into *strategies*, which themselves are broken down into *tactics* to be implemented.

  🕮 *A strategy is a component of a mission. It represents a means of action essential to achievement of ends of the enterprise, and more practically its goals. A strategy channels enterprise efforts towards these goals. A strategy is the approach considered by the enterprise as being the best suited to achieving its goals, taking account of constraints imposed by the environment and by risks.*

  🕮 *A tactic is a course of action that implements part of the detailing of strategy. A tactic contributes to a strategy implementation.*
- The exhibited capabilities; see "Managing exhibited business capabilities", page 80.

  🕮 *An exhibited business capability is measurable objectively within the framework of an enterprise stage, on a defined geopolitical scope (site), and focused on a given market segment (business partner).*

To add a strategic element in the enterprise stage strategy diagram:

1. In the diagram object toolbar, click **Strategy**, for example.
2. Click the enterprise stage frame.
   A strategy creation window opens.
3. Click on the arrow associated with the **Name** field and select the strategy that interests you.

4. Click **OK**.
   The strategy component appears in the diagram.

Defining the dependencies between the diagram strategies

A dependency link between one capability composition and another is used to specify the elements on which this dependency is based.

For example, for "Delivery of pizzas" use "Prepare the pizzas". Note that the expected result (business effect) of "Delivery of pizzas" is a "Pizza delivered" and the expected result (business effect) of "Preparation of pizzas" is a "Cooked pizza"

Dependent Business Effect and **Desired Business Effect** are the business capability results.

To create dependency links between two strategic elements:

1. In the insert toolbar, click **Business Capability Dependency**.
2. Click the user component, and keeping the left mouse button pressed, move the cursor to the assembly used.
3. Release the mouse button.
   The capability composition appears in the diagram.

To enter the results concerned by a dependency between two business capability components:

1. Open the **Characteristics** properties dialog box.
2. Enter the user component result in the **Dependent Business Effect** field.

   For example, "Pizza delivered".
3. Enter the user assembly result in the **Desired Business Effect** field.

   For example, "Pizza cooked".

   ☛ *A single capability composition can have more than one dependency within a single diagram.*

HOPEX Business Architecture Reports

HOPEX Business Architecture provides facilities for analyzing and tracking the changes implemented in the business function of your enterprise. **HOPEX** Suite uses reports to group sets of repository objects and study their interactions.

☛ *For more details on operation of reports, see the HOPEX Common Features guide, "Generating Reports".*

Report templates proposed as standard by **HOPEX Business Architecture** offer various analysis presentation possibilities.

The **HOPEX Business Architecture** functional administrator uses this report to check the consistency of the contents of a library or an enterprise plan. For more details, see "Using Libraries", page 207.

ARCHITECTURE DESCRIPTION REPORTS

This section presents the list of architecture description reports.

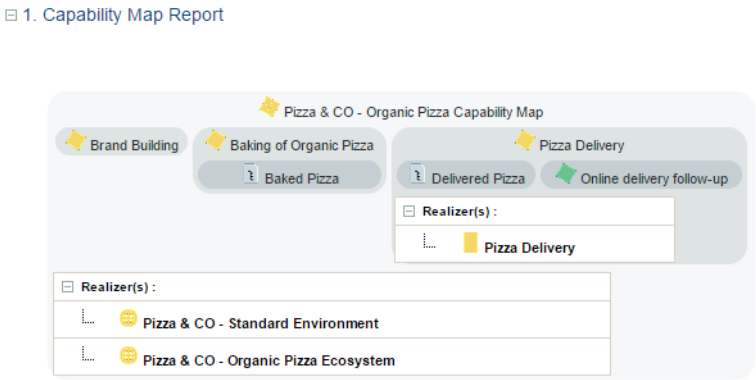
Breakdown map of business capabilities

You can use this report to display the realization coverage of business capability elements by operational elements such as business functions and according to different approaches: Organizational, Business/Data, Logical/Physical Application, etc.

☛ *For more details on how to associate a business capability with operational elements, see "Creating a business capability realization", page 57.*

Report example

The example below enables viewing of the coverage rate of the capability specified as parameters.



☛ *Example of business architecture breakdown report.*

Report parameters

This consists of defining report input data.

Parameters	Parameter type	Constraints
Root object	Capability map, Capability	One object mandatory.
Depth level	Short	Defines the breakdown level of the business capability map or the capability entered as a parameter.
Number of columns	Short	Defines the number of columns displayed by breakdown level (for eg. 2 or 3)
Color palette	HOPEX palette	Mandatory. The palette delivered by default is "BoxInBox Report Monochrome Grey"
EA Level	Multiple choice: - business function level, - organizational level, - application level, - technical level.	Define which objects of which type of architecture level are displayed for capability realizations; *For example, activation of the "applications level" displays the business capability realizations for the Application System Environment, the Application Systems or the Applications*
EA dimension	Multiple choice: - capability models, - agent models, - process model, - information models, - performance models, - results models	Define which types of objects are examined within the framework of the breakdown analysis *For example, activation of "capability models" will display the business skills or functionalities required by the capabilities that are broken down*

Business Architecture Breakdown Reports

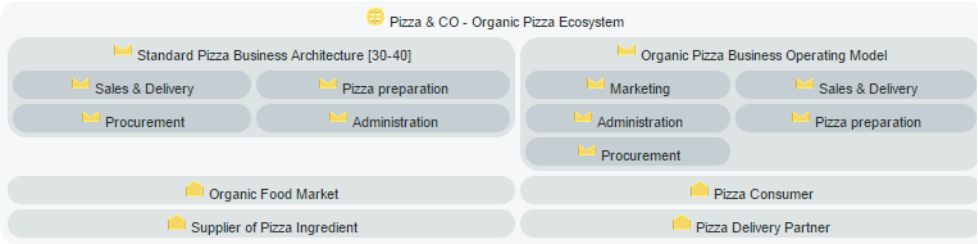
Based on the same principle as the breakdown report for business capabilities, this report presents the breakdown of a business function architecture environment with respect to its components.

☛ *For more details on how to describe a business functional area, see "Describing a business architecture environment", page 38.*

Report example

The example below shows the breakdown of the business functional area for making pizzas.

1. Business Architecture breadown



☛ *Example of breakdown report of business functional area.*

Report parameters

This consists of defining report input data.

Parameters	Parameter type	Constraints
Root object	business architecture environment	One object mandatory.
Depth level	Short	Defines the breakdown level of the business capability map or the capability entered as a parameter.
Number of columns	Short	Defines the number of columns displayed by breakdown level (for eg. 2 or 3)
Color palette	HOPEX palette	Mandatory. The palette delivered by default is "BoxInBox Report Monochrome Grey"

Exploded diagram report

For more details, see "Launching the exploded diagram report" in the diagram chapter of **HOPEX Common Features** guide.

DataSet Reports dedicated to the architecture description

☛ *A DataSet report is a data table (based on repository objects), on which instant reports can be generated.*

In addition to the report templates, the following dataset reports are also provided:

- "Capabilitiy Dependencies Matrix", page 99.
- "Matrix Business Capability x Process", page 100 :
- "Business Capabilities x Required Functionalities Matrix", page 100.
- "Business Functions x Required Functionalities Matrix", page 101.

Capabilitiy Dependencies Matrix

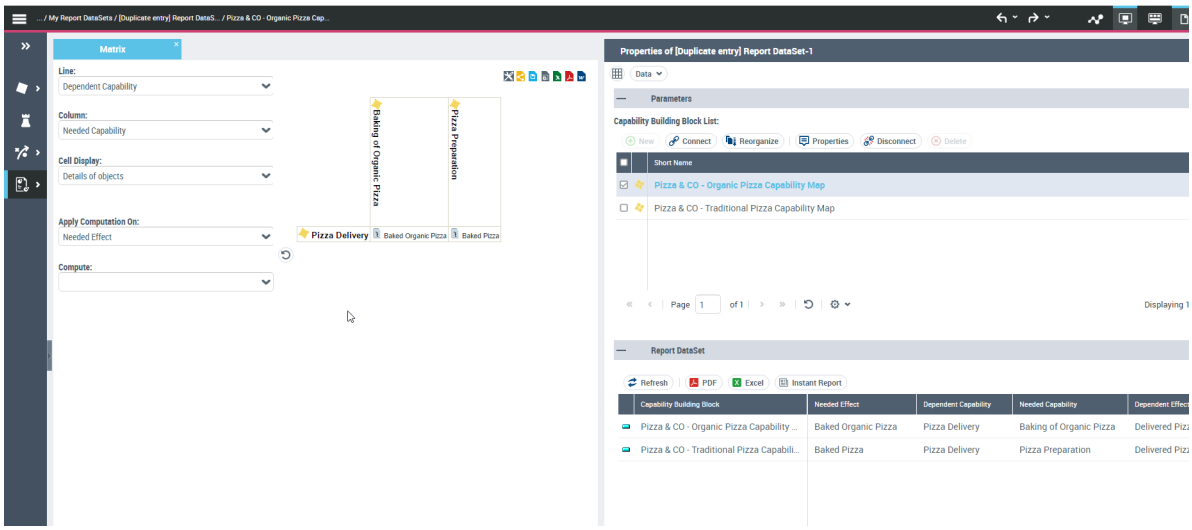
Within a business capability map or a parent capability: the capability components are dependencies.

For a dependency, the effects of dependent capabilities can be mentioned.

Parameter	Parameter type	Constraints
Root object	Business capability map/ Capability	Object list.

The data structure scans the following links: **Business Capability Component > Capability Dependency > Effect expected/ required > Capability component required**.

It is used for example to create a **Business confidentiality matrix/ Business capability** that specifies the expected effects.



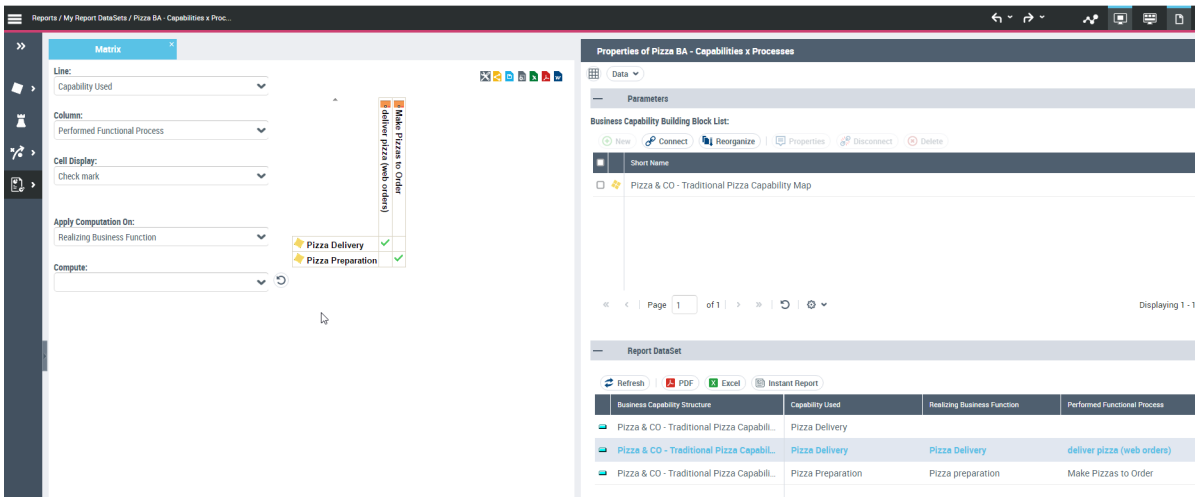
Matrix Business Capability x Process

A business capability (or a business capability map), can be implemented by a business function (or a business functional area) that executes one or more functional processes.

Parameter	Parameter type	Constraints
Root object	Business capability map/ Capability	Object list.

The data structure scans the following links: **Business Capability > Capability Realization > Business Function > Process Execution > Value Stream**.

This data structure is used for example to create a **Business capability matrix x Value Stream**.



Business Capabilities x Required Functionalities Matrix

Business capabilities can require functionalities

Parameter	Parameter type	Constraints
Root object	Business capability map/ Capability	Object list.

The data structure scans the following links: **Business capability > Functionalities required**.
This data structure is used for example to create a **Business Capabilities x Required Functionalities Matrix**.

Business Functions x Required Functionalities Matrix

Business functions can require functionalities.

Parameter	Parameter type	Constraints
Root object	Business function / Business functional area	Object list.

The data structure scans the following links: **Business function > Required functionalities**.
This data structure is used for example to create a **Business Functions x Required Functionalities Matrix**.

STRATEGIC REPORTS

This paragraph presents the list of strategic reports.

SWOT analysis

With **HOPEX Business Architecture**, the assessment of drivers is of **SWOT** type: Strengths, Weaknesses, Opportunities, Threats.

The assessment is carried out within the context of a given **strategy evaluation** and at a given date.

☛ *For more details on establishing this report, see "Using strategy assessments", page 68.*

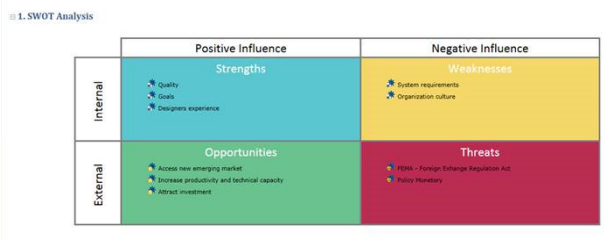
The driver assessment results are presented in this report.

The top line of the quadrant presents the distribution of the internal drivers.

- the **Positive influence** section draws up the list of internal drivers assessed as **Strengths**.
- the **Negative influence** section draws up the list of internal drivers assessed as **Weaknesses**.

The lower line of the quadrant presents the distribution of external drivers.

- the **Positive influence** section draws up the list of internal drivers assessed as **Opportunities**.
- the **Negative influence** section draws up the list of internal drivers assessed as **Threats**.



Report parameters

Parameter	Parameter type	Constraints
Begin Date	Date	Mandatory. Note: for a report embedded in the "Strategy Assessment" object page, the start date of the assessment is taken into account
End date	Date	Mandatory. Note: for a report embedded in the "Strategy Assessment" object page, the end date of the assessment is taken into account
Assessment strategy	Strategy assessment	Mandatory. Note: for a report embedded in the "Strategy Assessment" object page, the current object is taken into account

☛ *If several successive driver assessments were performed on a single assessment in the strategy, the last assessment dated for the time period defined as a parameter will be taken into account.*

Reports DataSets of strategy

☛ *A DataSet report is a data table (based on repository objects), on which instant reports can be generated.*

In addition to the report templates, dataset reports are also provided:

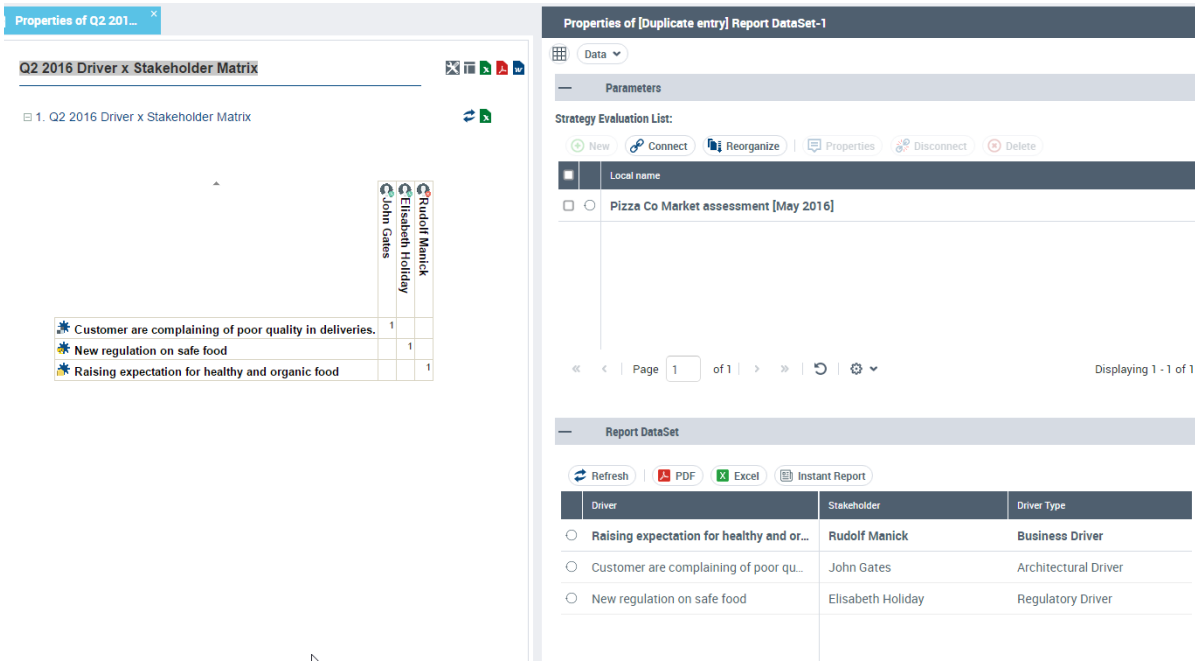
- "Driver x Stakeholder Matrix", page 104.
- "Driver x Enterprise Goal Matrix", page 105.

Driver x Stakeholder Matrix

The stakeholders - persons or governance bodies (EA Organization) – can be assigned to drivers via a role : owner or concerned stakeholder.

Parameter	Parameter type	Constraints
Root object	Strategy assessment	Object list.

The data structure scans the following links: **Strategy assignment > assessed driver > driver > assignment > assignable entity**.
This data structure is used for example to create a **Matrix Drivers x Stakeholders**.



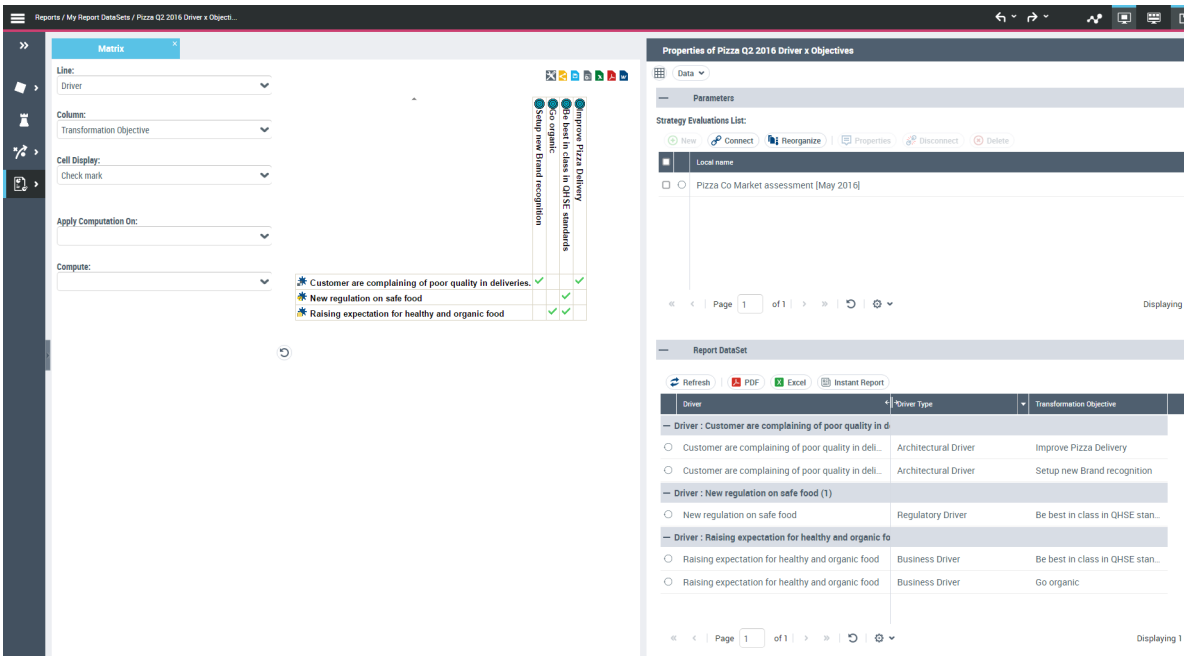
Driver x Enterprise Goal Matrix

An enterprise goal can be directly linked to the driver for which it is the origin.

Parameter	Parameter type	Constraints
Root object	Strategy assessment	Object list.

The data structure scans the following links: **Strategy assessment > assessed driver > driver > assignment > Enterprise Goal**.

This data structure is used for example to create a **Matrix Drivers x Enterprise Goal**.



THE PLANNING REPORTS

This paragraph presents the list of planning reports.

Gantt report

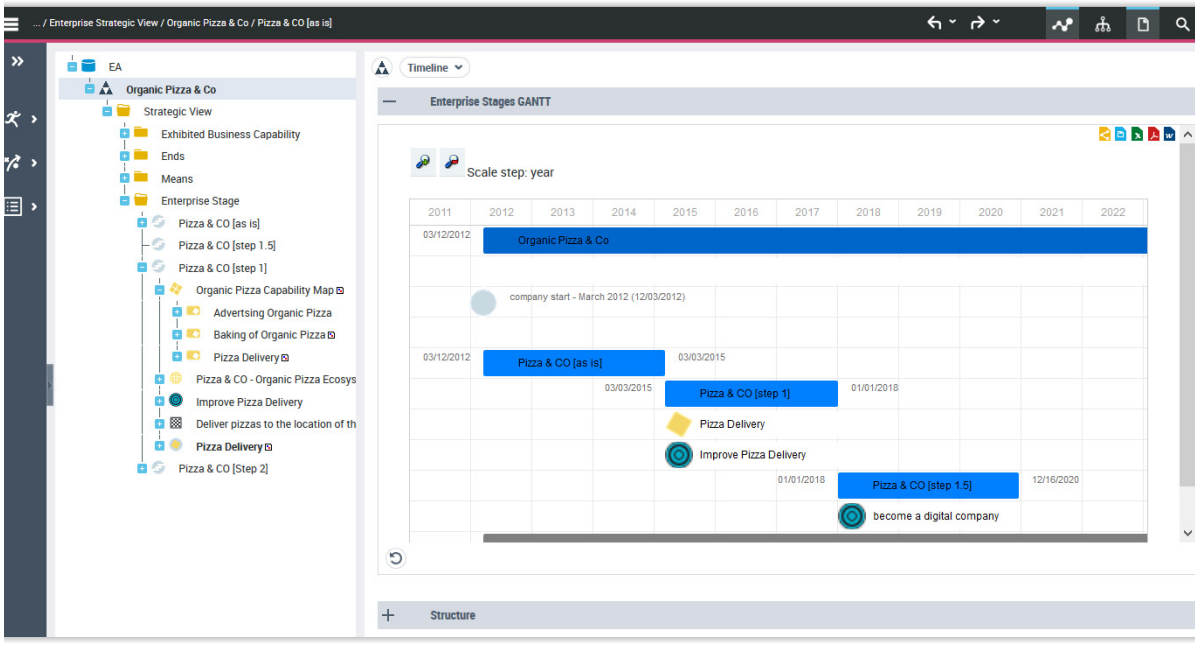
This report, which is embedded in the page of an **Enterprise** object or Enterprise transformation stage is used to display:

- the breakdown of the enterprise of the current stage into sub-stages (on a single level of breakdown);
- the Enterprise Goals and the exhibited capabilities for each sub-stage.

☛ *This report is read only; modification of the contents of the transformation stage or enterprise is possible in the tree list available in the embedded report.*

☛ *For more details on how to describe a roadmap, see "Defining enterprise stages", page 87.*

Report example



Report parameters

Parameters	Parameter type	Constraints
Enterprise stage	Enterprise or stage	One object mandatory.

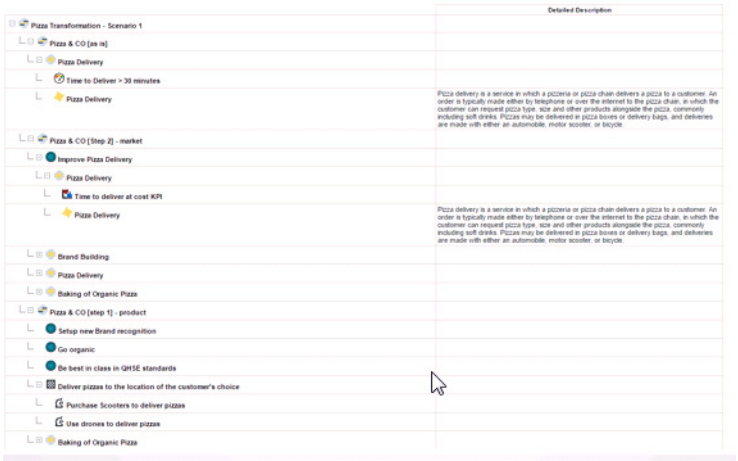
Enterprise roadmap report

This report presents the breakdown of the steps of an enterprise transformation plan;

☛ *For more details on how to describe a roadmap, see "Defining enterprise stages", page 87.*

Report example

The example below is used to display the roadmap of the transformation plan for pizza making.



☛ *Example of a roadmap*

Report parameters

This consists of defining report input data.

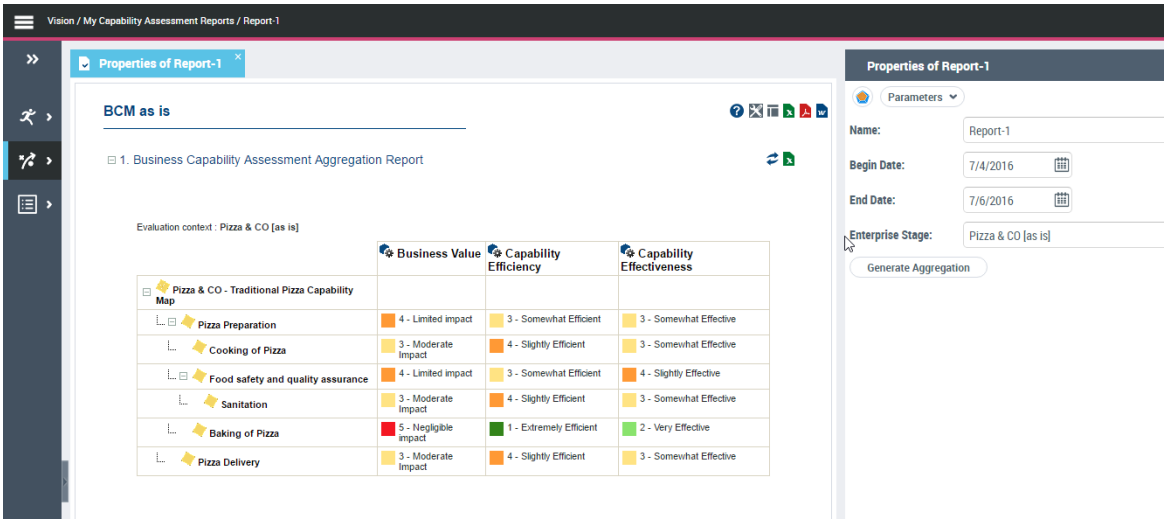
Parameters	Parameter type	Constraints
Enterprise stage	Enterprise or stage	One object mandatory.

Capability assessment report

This report presents the consolidated results of assessments performed on a business capability connected to a capability map between two dates entered as a parameter.

☛ *For more details on the business capability maps assessment, see "Using business capability maps", page 78.*

Report example



☛ *Example of a business capability assessment report.*

Report parameters

This consists of defining report input data.

Parameters	Parameter type	Constraints
Begin Date	Date	Mandatory.
End date	Date	Mandatory.
Enterprise stage	Business capability	Mandatory.

☛ *Recalculation of the aggregation of capability assessments is required prior to generation of the report; it is triggered by the **Generate aggregate** button.*

DataSet Reports on roadmap

☛ *A DataSet report is a data table (based on repository objects), on which instant reports can be generated.*

In addition to the report templates, the following dataset reports are also provided:

- "Enterprise Stage x Capability Matrix", page 109.
- "Action means", page 110.

Enterprise Stage x Capability Matrix

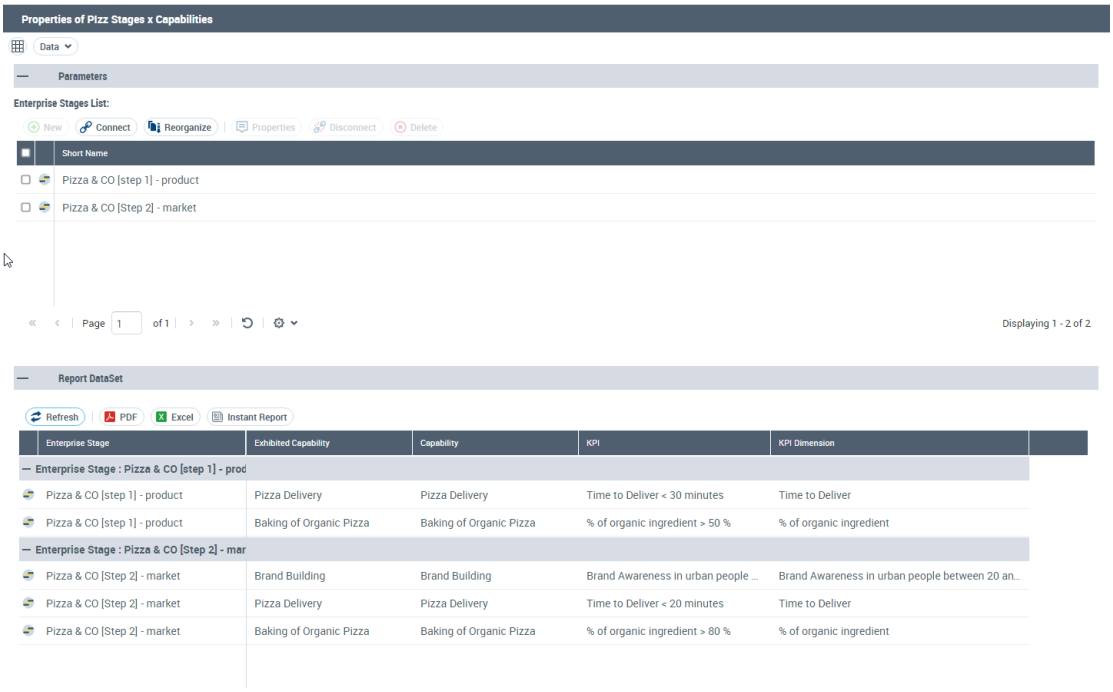
The business capabilities are connected to the enterprise stages via exhibited capabilities.

Parameters	Parameter type	Constraints
Enterprise stage	Enterprise or stage	One object mandatory.

The data structure scans the following links:

- **Enterprise stage > Exhibited capability**
- **Enterprise stage > KPI**
- **Enterprise stage > Business function capability > KPI dimension**

This data structure is used for example to create a **Enterprise stage matrix x Business capability**, by specifying the KPI with the exhibited capability in the cells.



Action means

This data structure is used to consult the content of an enterprise on objectives and means (strategies and tactics) point of view.

Parameters	Parameter type	Constraints
Enterprise stage	Enterprise or stage	One object mandatory.

The data structure scans the following links: **Enterprise stage > Enterprise Goal > Strategy > Tactic > Business capability required > Business capability**