

# Drinking our own champagne

Using TOGAF™ to architect  
The Open Group's systems

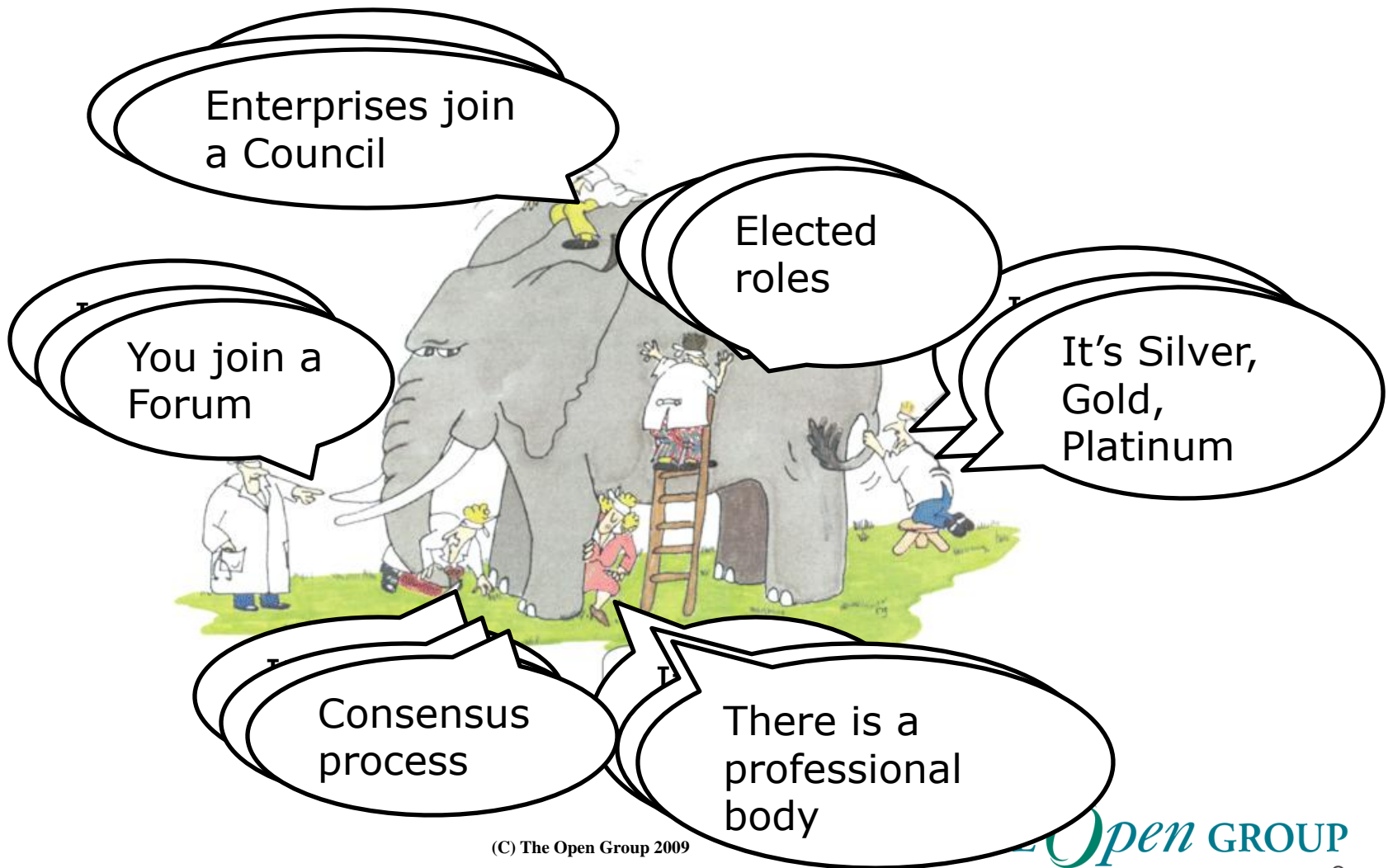
THE *Open* GROUP

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Enterprises join  
a Council

You join a  
Forum

Elected  
roles

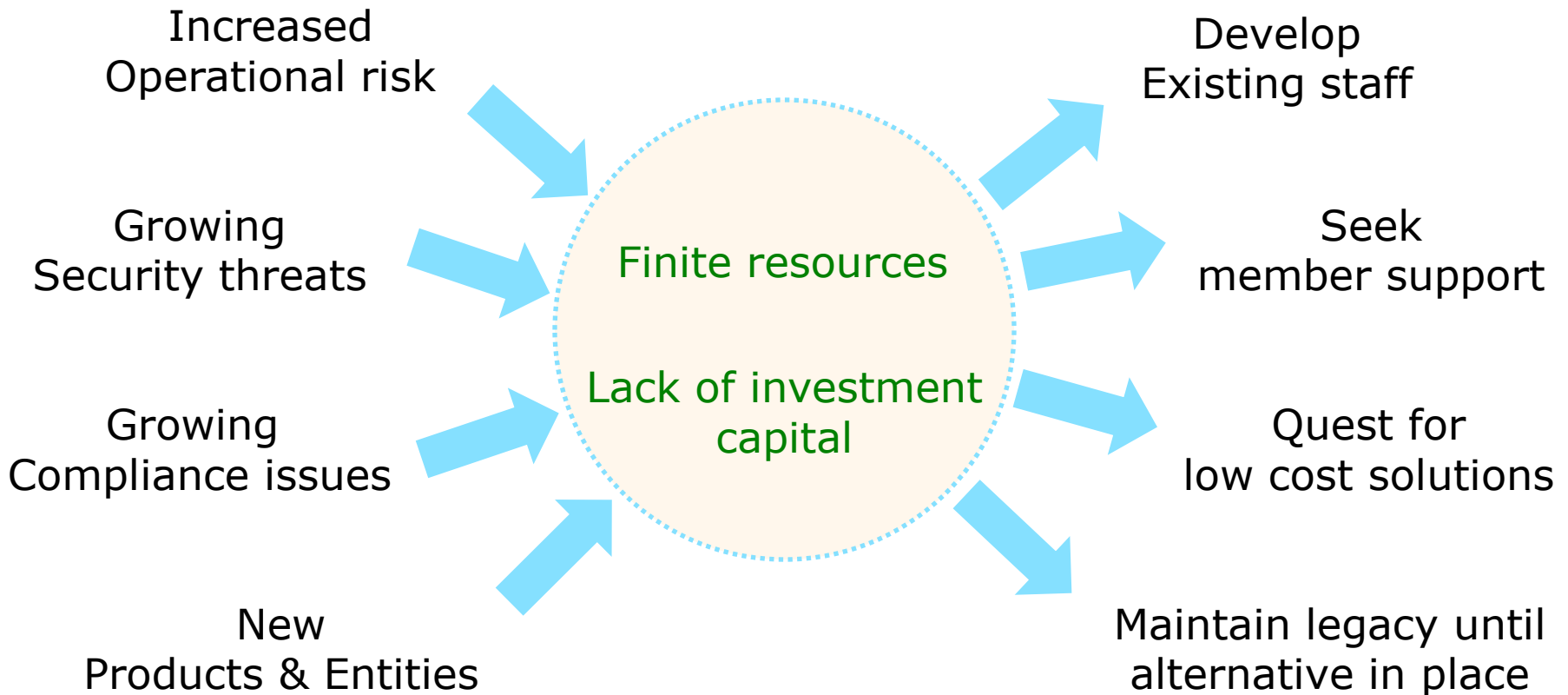
It's Silver,  
Gold,  
Platinum

Consensus  
process

There is a  
professional  
body

# The Open Group in a Boundaryless world

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# Achievements .... so far

What	Benefits	Status
Replaced obsolete finance system	Reduced risk Reduced effort Improved readiness for SOX compliance Enhanced capability	Enhanced capability being rolled out
Outsourced credit card handling	PCI Compliance Reduced security vulnerability	Complete
Off-sited servers	Reduced operational and security risk	Partial
CRM	Ability to deliver individual membership New event registration system	AOGEA live Membership live Event registration in beta
CMS	Ability to federate web site content updates	Undergoing pilot

# How we do architecture

Preliminary

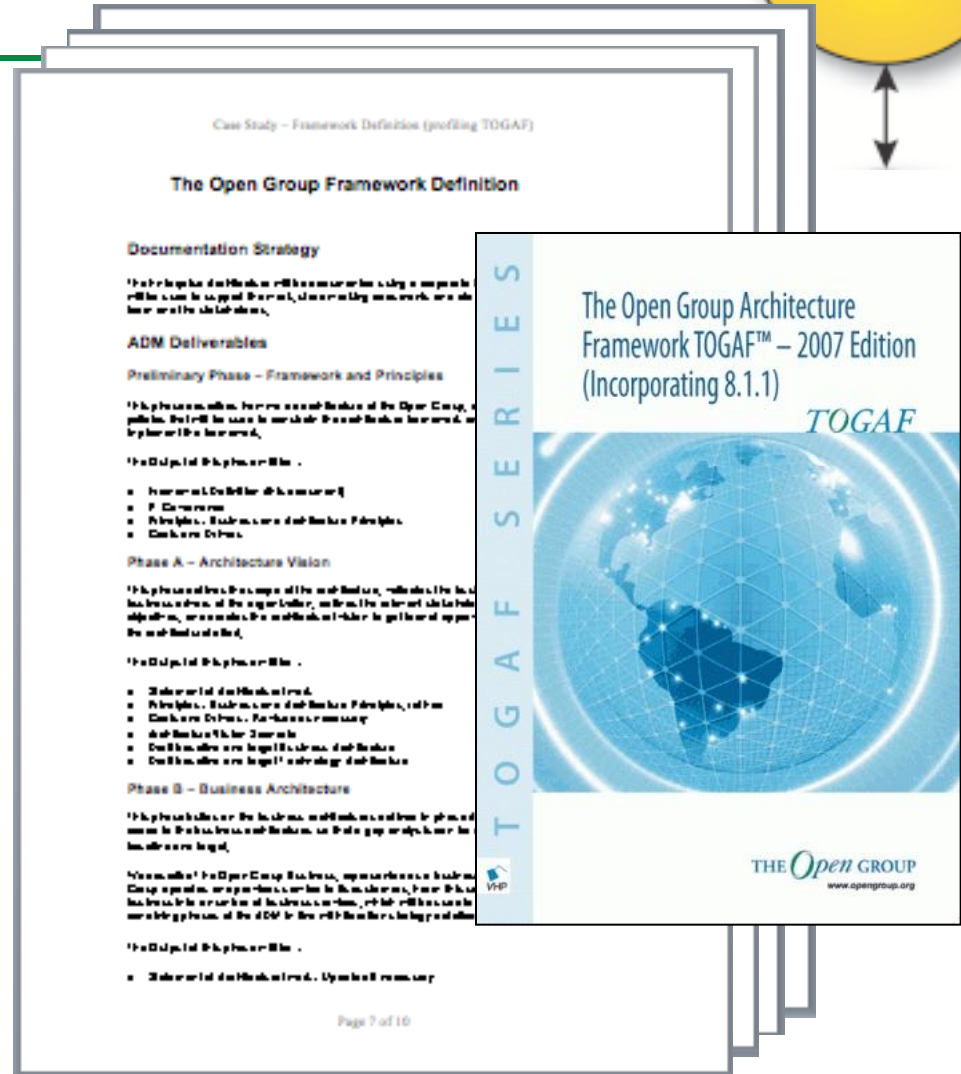
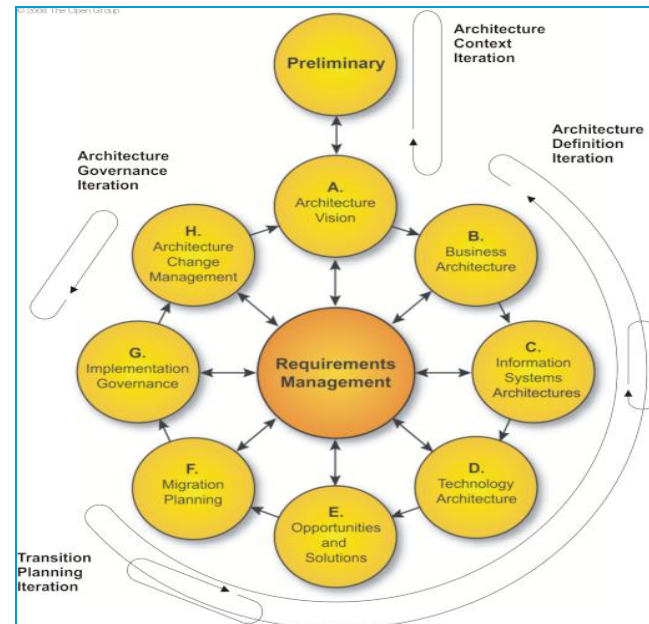
- Documentation strategy
  - Corporate intranet
  - “Plato” site
- Guidance from members
  - Chris Greenslade
    - TOGAF
  - Chris Armstrong
    - UML, BPMN

The screenshot shows the TOGAF Home page with the following content:

- THE Open GROUP** logo with the tagline "Making standards work®".
- Page title: "The Open Group Enterprise Architecture TOGAF Home".
- Text: "You are here: TOGAF Home".
- Scope**: "The Open Group's architectural process will follow TOGAF 9 with use being made of the 'Ross, Weil, Robertson' Operating Model concept to partition the enterprise architecture into a number of architectural 'segments' and phase the migration of those 'segments' towards the end vision target architecture. This site is used to present the various phases of the ADM for the Open Groups overall enterprise architecture framework. That is the complete overarching enterprise architecture into which the succession of these operating model segments will be integrated."
- The Operating Model**: A diagram showing a central "Requirements Management" circle surrounded by "A Architecture Vision", "B Business Architecture", "C Information Systems Architectures", "D Technology Architecture", and "E Opportunities and Solutions". Above this is "F Enterprise Planning", "G Implementation Governance", and "H Architecture Change Management". At the top is "Prelim Framework and Problems".
- The ADM**: A list of phases: Preliminary Phase, Phase A, Phase B, Phase C, Phase D, Phase E, Phase F, Phase G, Phase H, and Requirements Management.
- Completeness Indicator**: A table with five rows showing different completion levels: Work in progress, Draft, Peer Reviewed by Architecture Team, Reviewed by Stakeholders, and General bullet - progress is not applicable.
- Other Quick Links**: A list of links including Change Control Chart, Summary of Pain Points, Bug Tracking Area for Requirements Capture, Actor Definition Document, and Glossary.
- Tools and Notation**: Links for BPMN Specification Version 1.0 and Business Process Visual Architect - User Guide.

# How we do architecture

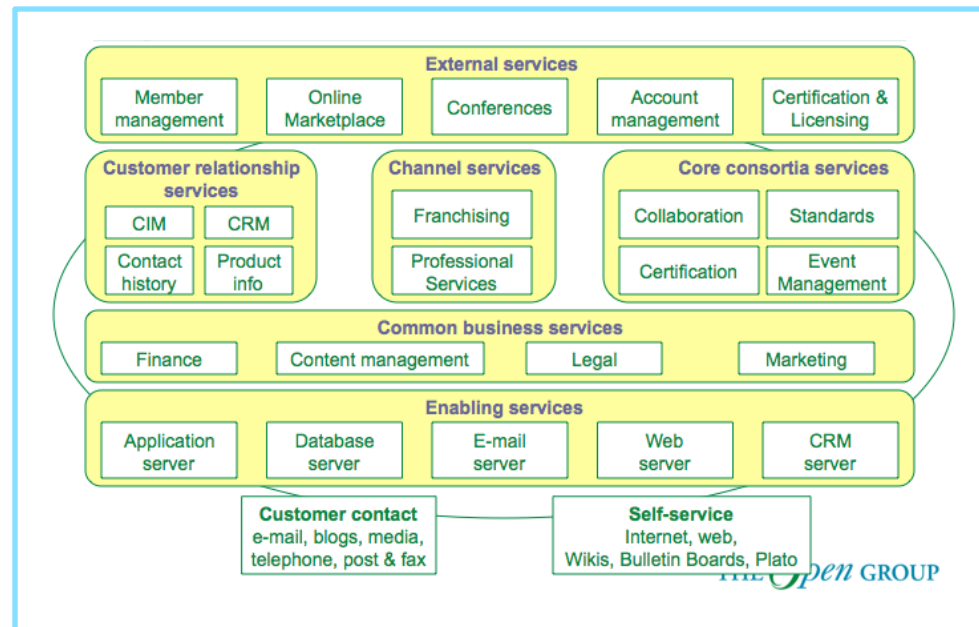
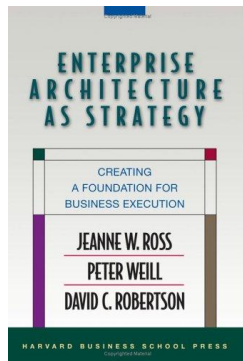
- Framework and Principles
  - Framework Definition
  - IT Governance



# Operating model



- ❑ Highlights the operational services and the phase of migration in which they would be addressed
- ❑ Facilitates federation / parallel activity in a governed manner
- ❑ Avoid the centralized activity bringing everything else to a halt



# Principles



- Based on TOGAF model
  - Title
  - Statement
  - Rationale
  - Implications
- Developed by Internal Architecture Board
  - Business continuity
  - Custodianship
  - Citizenship
  - Anyplace, anytime
  - Self-serve (gas pump)
  - One source
  - De-customization
  - Preference for standards
  - Painless user experience

The grid contains 9 principle cards, each with a title, a statement, a rationale, and implications. The cards are numbered 22 to 30.

- 22 Business Continuity:** Statement: Business continuity is a top priority for the organization. Rationale: Business continuity is a top priority for the organization. Implications: Business continuity is a top priority for the organization.
- 23 Custodianship:** Statement: The organization is responsible for the security and integrity of its information. Rationale: The organization is responsible for the security and integrity of its information. Implications: The organization is responsible for the security and integrity of its information.
- 24 Citizenship:** Statement: The organization is a citizen of the community it serves. Rationale: The organization is a citizen of the community it serves. Implications: The organization is a citizen of the community it serves.
- 25 Anyplace, anytime:** Statement: The organization is available to its customers anytime, anywhere. Rationale: The organization is available to its customers anytime, anywhere. Implications: The organization is available to its customers anytime, anywhere.
- 26 Self-serve (gas pump):** Statement: The organization provides self-serve services to its customers. Rationale: The organization provides self-serve services to its customers. Implications: The organization provides self-serve services to its customers.
- 27 One source:** Statement: The organization is the single source of truth for its customers. Rationale: The organization is the single source of truth for its customers. Implications: The organization is the single source of truth for its customers.
- 28 De-customization:** Statement: The organization provides standardized services to its customers. Rationale: The organization provides standardized services to its customers. Implications: The organization provides standardized services to its customers.
- 29 Preference for standards:** Statement: The organization prefers to use standards in its services. Rationale: The organization prefers to use standards in its services. Implications: The organization prefers to use standards in its services.
- 30 Painless user experience:** Statement: The organization provides a painless user experience to its customers. Rationale: The organization provides a painless user experience to its customers. Implications: The organization provides a painless user experience to its customers.



# Phase A - Vision

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Inputs	Outputs
Outputs from Preliminary Phase	Refined
Business priorities	Scope for this iteration
Business Constraints	Constraints
High level business scenario	Refined business scenario
Legacy architecture assets	Baseline & Target Architectures

# Business Goals and Drivers

## The Open Group Strategy

### 1 Executive Summary

The Open Group is organized along two lines of activity:

- The Open Group Consortium, delivering value to its members
- The Open Group Collaboration Services, delivering value to other consortia

The Open Group strategy, for practice described in the Harv Earth Plans by V Kasturi Rang mission of The Open Group to

The Boundaryless Information first step and is broad and far-need. Its significance can only sense intended by Peter Druck to be made. The next step is th Group in realizing that vision. critical success factor for mark The Open Group. Working wi critical to achieving the delive processes in the industry, and to customer confidence and m

The third step is the strategy p four critical components: client development and delivery, fur development, and organization

The final step is the programs Conservancy may address the invasive species, and so forth, Boundaryless Information Flo

## Business drivers

- Develop capability
  - Certification of individuals - new
  - Accreditation of corporate entities - new
  - Franchising The Open Group
  - Professional association - n
- Replace obsolete systems
  - Finance system – no longer
  - Membership database – thr
- Reduce operational and secu
  - Aging infrastructure
  - Dependence on individual k
  - Increased external threats
- Compliance
  - Credit card handling
- Staff development
  - TOGAF knowledge and com

- Business drivers and principles are critical
  - Constraints can get out of hand
  - You need experience to be SMART

## SMART objectives

- By end of --/--/---- we will have enabled a self-service system for customer order processing and fulfillment of any price-listed product
- On the road to this we will:
  - Before the -- conference we will have made a temporary, workable fix to the way we handle credit card information.
  - By end of -- we will have a view of the Enterprise Architecture so that we can make investment decisions by priority.
  - By mid --/-- we will have committed to a new Finance System as a part of executing on that Enterprise Architecture
  - By the -- conference we will have an alternative (perhaps temporary) conference registration system in place
  - By end of --/--we will implement a new ERP system and a new CRM system

- Pilot everything

# Statement of architecture work

## Phase 1 Objectives

The aims of the Phase 1 are:

- To continue the development of the CRM system
- To deploy a CRM system
- To deploy a CRM system

## Phase 1 Priorities

1. ✓ Secure create
2. ✓ Roll out Cr
3. ✓ Roll out m
4. - Migrate AC
5. - Develop ar
6. ✓ Migrate th
7. ✓ Deliver nev
8. ✓ Complete
9. - Go live with

KEY: - ✓ Job done

Objectives & Priorities

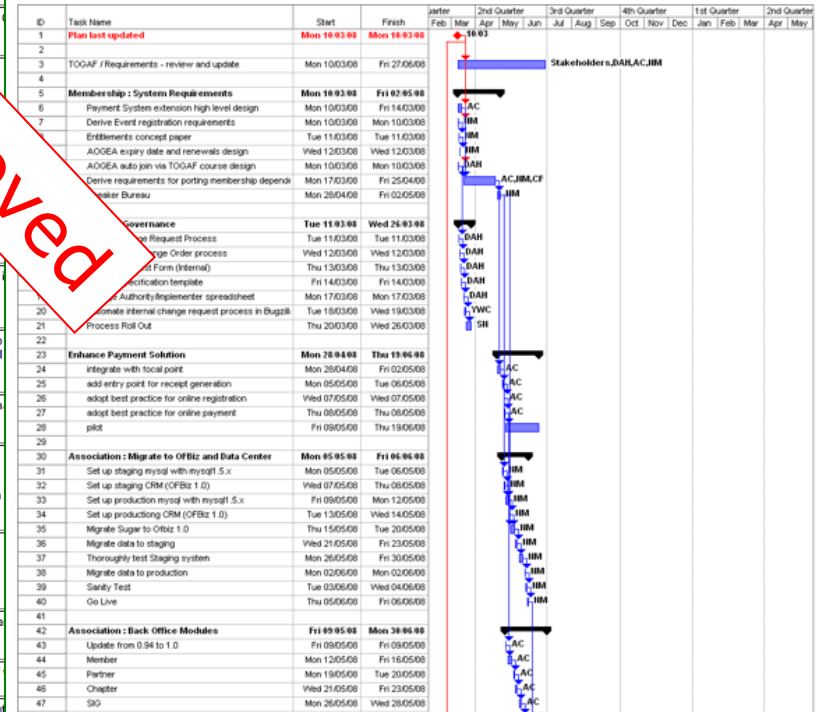
Major milestones

GANTT

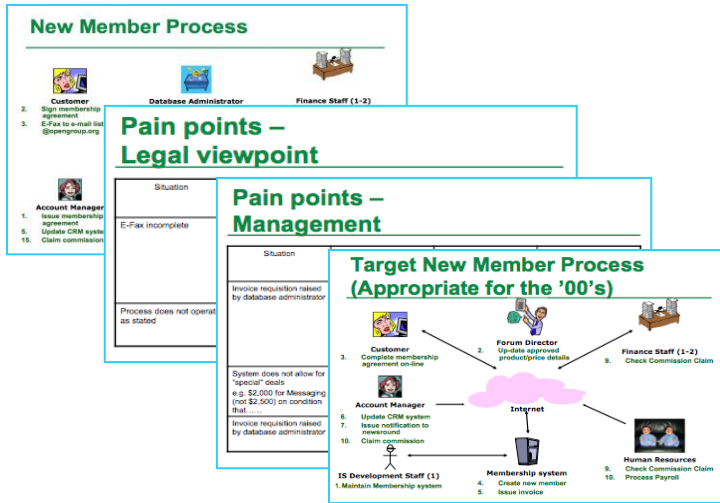
Major Milestone	Description	Target/Actual Date
Project Start	Membership project kick off meeting.	1st - 4th Oct 2007
Payment Solution Deployed	Cybersource payment solution deployed for pilot evaluation in the conference system.	12th Nov 2007
AOCEA Auto Join "sweep" deployed	System to auto join all individuals who are either ITAC or TOGAF certified who have not yet registered with the Association (4139 opt out emails dispatched)	10th Dec 2008
"Membership" Phase - TOGAF Complete	Update and Review by stakeholders of: <ul style="list-style-type: none"> <li>• Phase B - Principles</li> <li>• Phase B - Business Architecture</li> <li>• Phase B - Business Gap Analysis</li> <li>• Phase C - Membership Service</li> <li>• Access Control</li> <li>• Bulletin Board</li> </ul>	13th Feb 2008

ID	Task Name	Start	Finish
1	Plan last updated	Mon 10/03/08	Mon 10/03/08
2			
3	TOGAF / Requirements - review and update	Mon 10/03/08	Fri 27/06/08
4			
5	Membership : System Requirements	Mon 10/03/08	Fri 02/05/08
6	Payment System extension high level design	Mon 10/03/08	Fri 14/03/08
7	Derive Event registration requirements	Mon 10/03/08	Mon 10/03/08
	Entitlements concept paper	Tue 11/03/08	Tue 11/03/08
	AOCEA expiry date and renewals design	Wed 12/03/08	Wed 12/03/08
	AOCEA auto join via TOGAF course design	Mon 10/03/08	Mon 10/03/08
	Derive requirements for porting membership dependencies	Mon 17/03/08	Fri 25/04/08
	Member Bureau	Mon 26/04/08	Fri 02/05/08
	At present we have a number of legacy applications, representing the CRM system. A, mainly automated, survey will be completed. <a href="#">Legacy to new CRM system</a>		
	Governance	Tue 11/03/08	Wed 26/03/08
	Order Request Process	Tue 11/03/08	Tue 11/03/08
	Order process	Wed 12/03/08	Wed 12/03/08
	Form (Internal)	Thu 13/03/08	Thu 13/03/08
	Specification template	Fri 14/03/08	Fri 14/03/08
	Authority/Implementer spreadsheet	Mon 17/03/08	Mon 17/03/08
	Generate internal change request process in Bugzilla	Tue 18/03/08	Wed 19/03/08
	Process Roll Out	Thu 20/03/08	Wed 26/03/08
22	Enhance Payment Solution	Mon 24/04/08	Thu 19/06/08
24	Integrate with local point	Mon 26/04/08	Fri 02/05/08
25	add entry point for receipt generation	Mon 05/05/08	Tue 06/05/08
26	adopt best practice for online registration	Wed 07/05/08	Wed 07/05/08
27	adopt best practice for online payment	Thu 08/05/08	Thu 08/05/08
28	plot	Fri 09/05/08	Thu 19/06/08
29			
30	Association : Migrate to OFBiz and Data Center	Mon 05/05/08	Fri 06/06/08
31	Set up staging mysql with mysql 5.x	Mon 05/05/08	Tue 06/05/08
32	Set up staging CRM (OFBiz 1.0)	Wed 07/05/08	Thu 08/05/08
33	Set up production mysql with mysql 5.x	Fri 09/05/08	Mon 12/05/08
34	Set up production CRM (OFBiz 1.0)	Tue 13/05/08	Wed 14/05/08
35	Migrate Sage to OFBiz 1.0	Thu 15/05/08	Tue 20/05/08
36	Migrate data to staging	Wed 21/05/08	Fri 23/05/08
37	Thoroughly test Staging system	Mon 26/05/08	Fri 30/05/08
38	Migrate data to production	Mon 02/06/08	Mon 02/06/08
39	Sanity Test	Tue 03/06/08	Wed 04/06/08
40	Go Live	Thu 05/06/08	Fri 06/06/08
41			
42	Association : Back Office Modules	Fri 09/05/08	Mon 28/06/08
43	Update from 0.94 to 1.0	Fri 09/05/08	Fri 09/05/08
44	Member	Mon 12/05/08	Fri 16/05/08
45	Partner	Mon 19/05/08	Tue 20/05/08
46	Chapter	Wed 21/05/08	Fri 23/05/08
47	SGO	Mon 26/05/08	Wed 28/05/08
48	Work Group	Thu 29/05/08	Mon 02/06/08

Approved



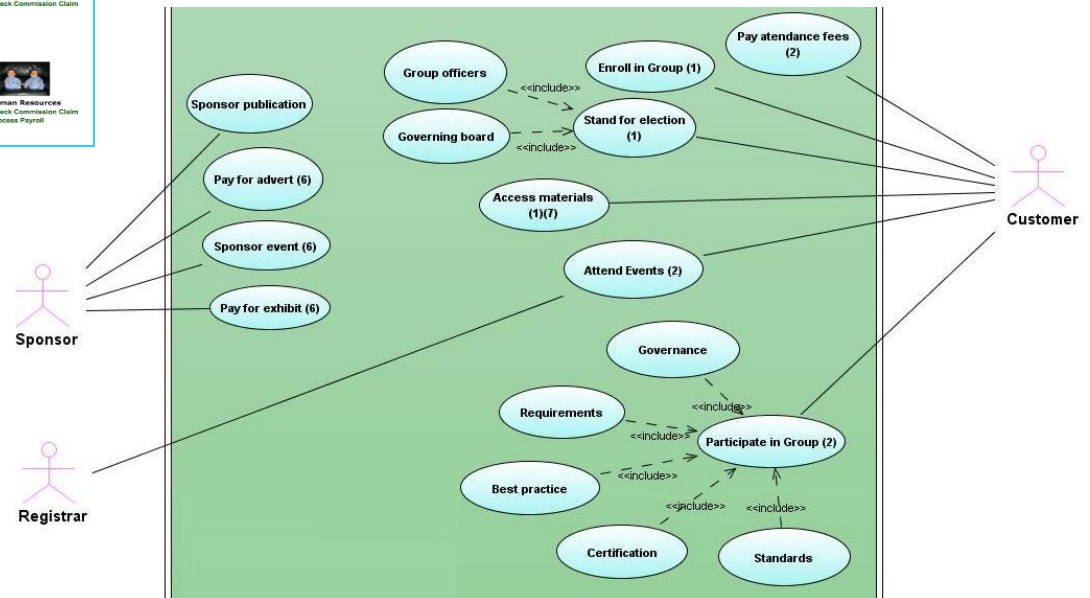
# Business Architecture



Membership  
Baseline & target

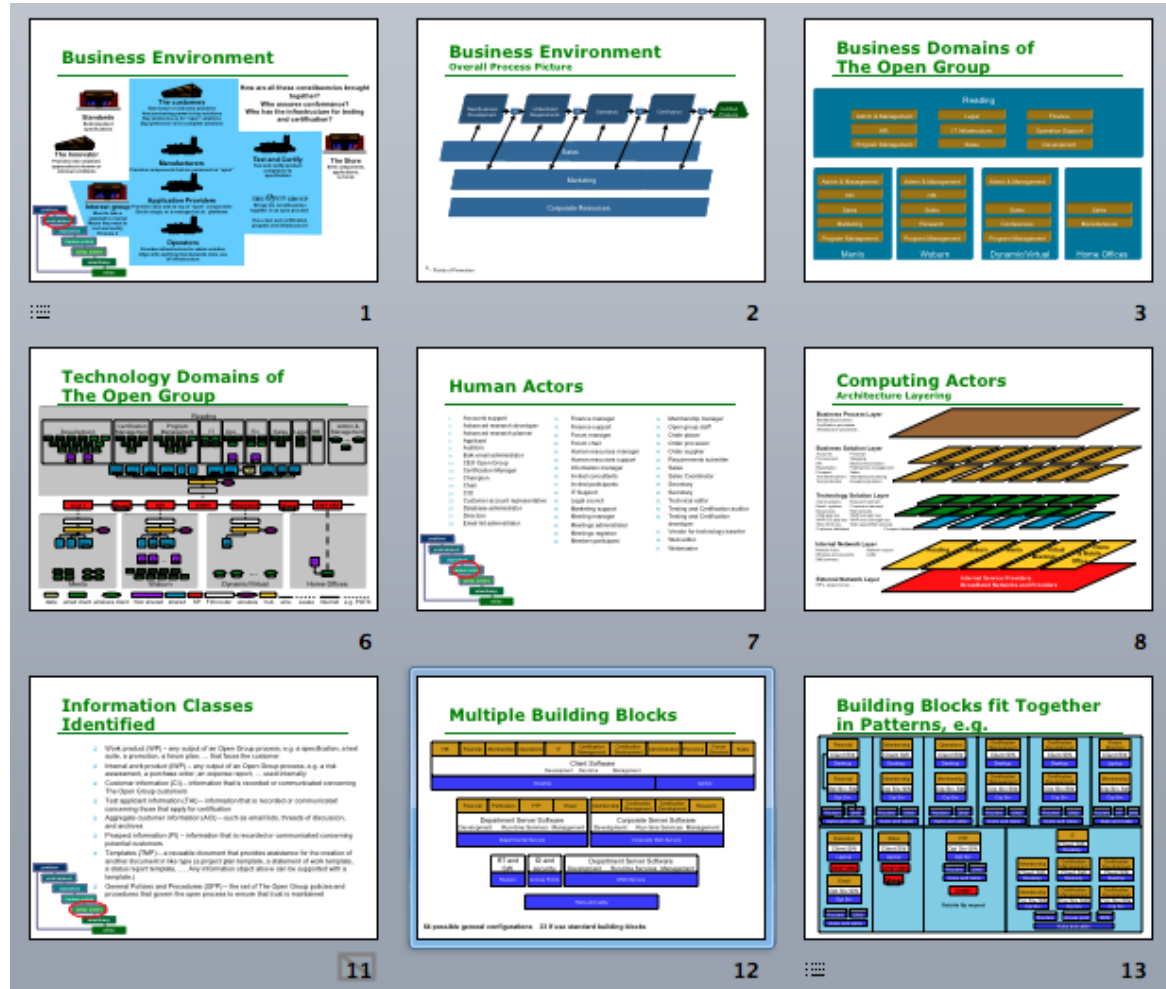
UML Use Case

Business Scenario



# Enterprise continuum - internal

- Legacy from early work
- A reference collection of enterprise architecture assets
- Continuously enriched



# Enterprise continuum - external

- ❑ Best practices
- ❑ Technical reference model

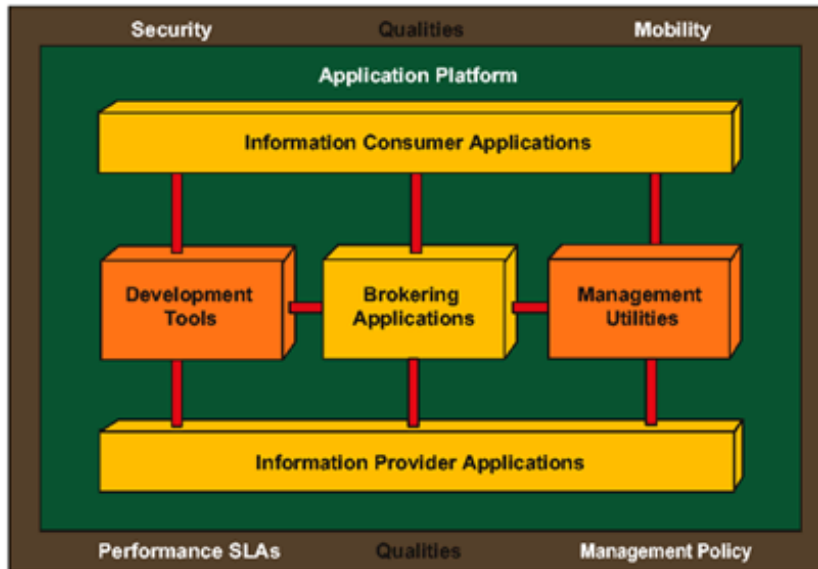


Figure: III-RM - High-Level

v. 1.0

Online Registration Best Practice

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### What will the user see?

The registration process will be broken down into a series of manageable screens to allow the user to enter their registration data.

Where the system already knows the data that should be present in a field it will automatically populate that field.

Where possible, fields will offer pick lists or guide the user to select from a list of known values rather than allow free text entry. An example is their organisation. They should be encouraged to pick their organisation name from the vast selection already available in the Open Group database.

When entry is complete the registration system will allow the user to check all the details that have entered and re-edit as necessary. Once the user is happy with all the data they confirm their details and the workflow utilizing the online registration continues.

The user will have the option to go back and forwards between screens and change data without data being lost. There will be separate buttons provided for this navigation, in addition to those provided by the browser.

The user will see breadcrumbs along the top of the screen, which tells them where they are in the steps of the registration process.

The screens will not be cluttered with help text. Although there can be a help icon which will open up help text in a separate window. Tool tips can be made available if appropriate (via the html title attribute).

Optionally each screen may have save facility. The save facility allows the user to save their data so they can return, re-edit and complete their registration later.

### Implementation Constraint

The user interface for these new registration processes will not be developed in `tp` technology. They will be developed using `J2EE` or `LAMP` technology. In some case this will mean that `tp` files and `jsp/html` files will coexist, an example being certification systems.

### Look and Feel

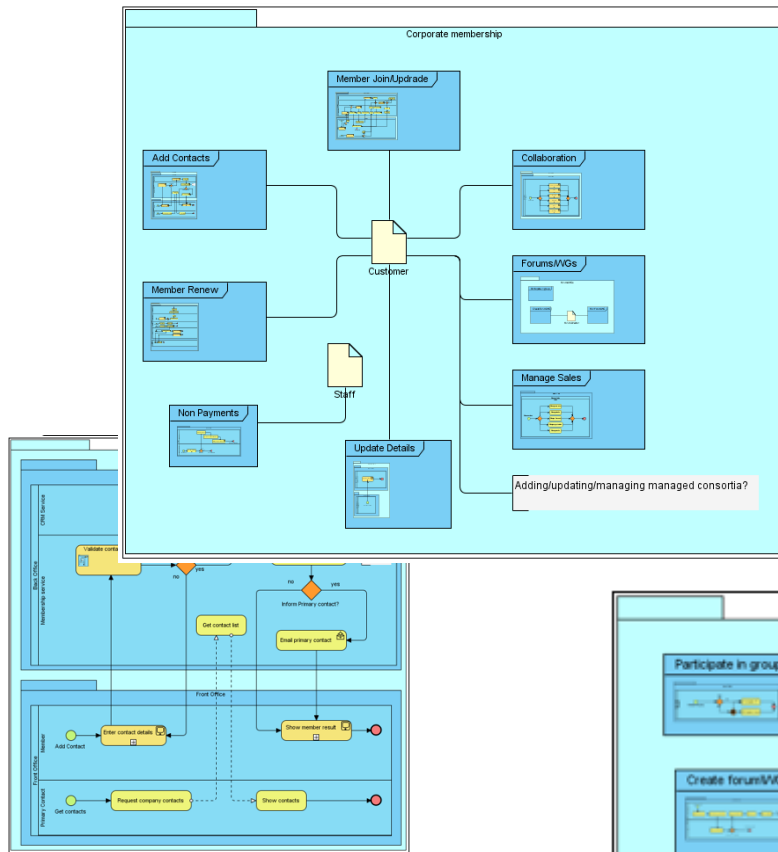
The registration process is used across the board, membership system, conference system, association system and certification systems to name a few. It is important that there is a consistent and corporate look and feel to the user interface components and controls used within the screens. The following user interface controls will therefore need a look and feel agreed with marketing and the webmasters.

- o Breadcrumbs (indicating the current step in the registration process)
- o Buttons (forwards, backwards, save, submit, re-edit and so on)
- o Icons (such as links to help)
- o Forms and other user controls (labels, text boxes, radio buttons, checkboxes, lists, spinners)
- o Dialog Boxes, Windows (such as those popped up for help)

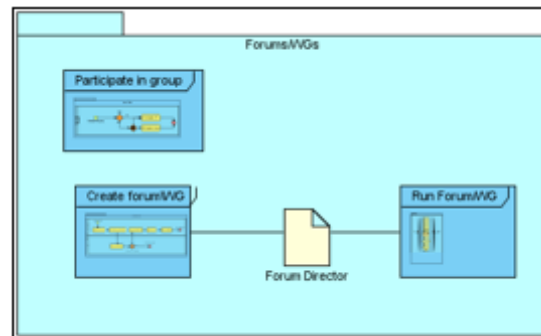
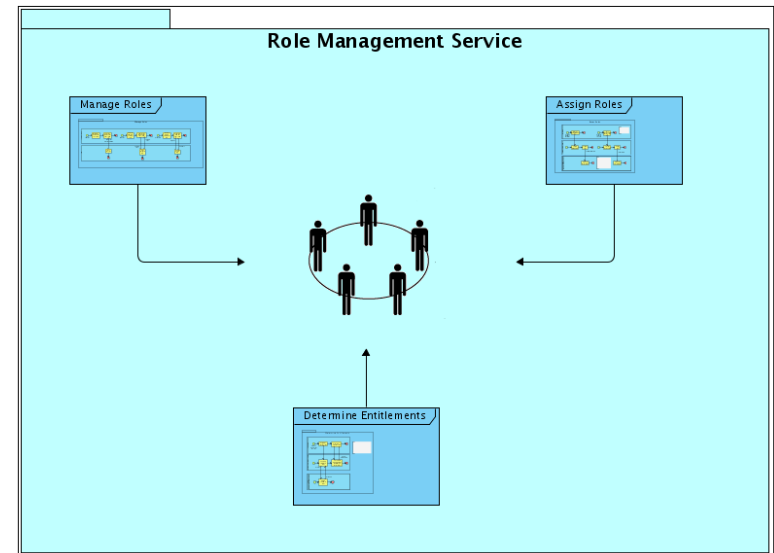
Page 2 of 2

# Business Architecture

## Business Processes



## Business Services





# Applications Architecture

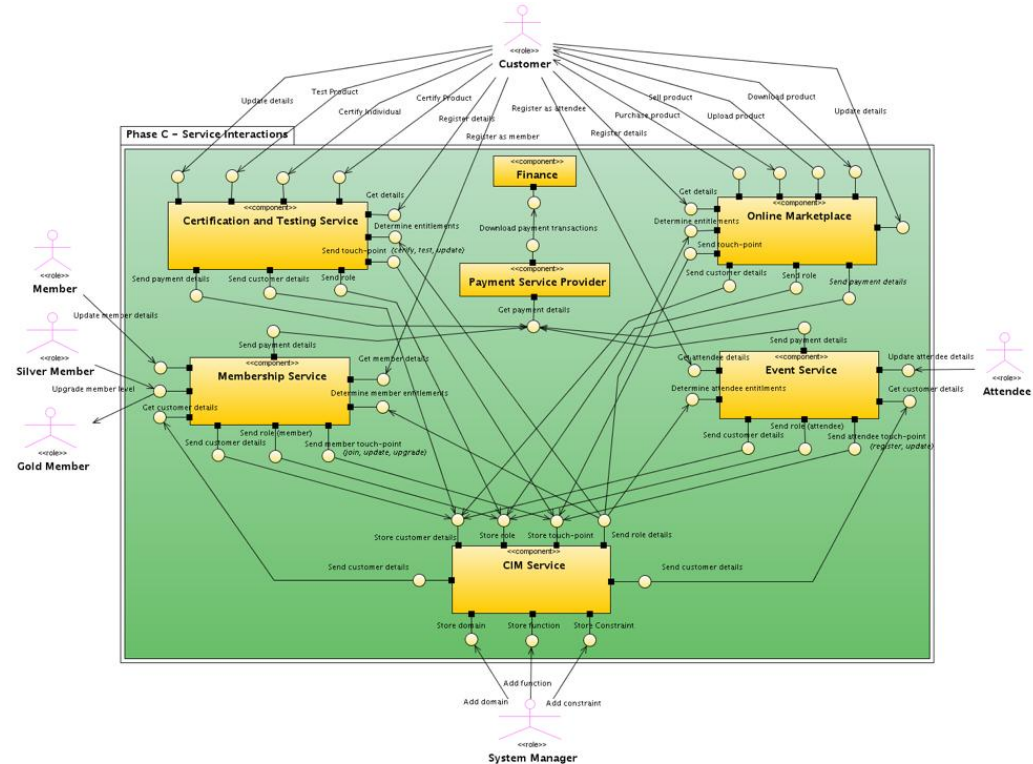
Open Group Servers	Open Group Applications	Client Applications - office
<ul style="list-style-type: none"><li>messaging</li><li>postbox/postman</li><li>srmtools</li><li>return</li><li>shades</li><li>rsdlund</li><li>average</li><li>akali</li><li>messaging</li><li>ova</li><li>vsobag</li><li>bc</li></ul>	<ul style="list-style-type: none"><li>Bug Tracking System</li><li>Calendar System</li><li>Conference Registration System</li><li>COE News System</li><li>Hotdesk diary</li><li>National Database</li><li>Openbrand and POSIX PB Systems</li><li>Regional NA/E Status</li><li>PLM</li><li>Publications database</li><li>Saphora</li><li>webchat</li><li>Wiki</li></ul>	<ul style="list-style-type: none"><li>Acrobat Acrobat</li><li>Arrows and spdf</li><li>Glomerat</li><li>MS Office - Word, Excel, PowerPoint &amp; Outlook</li><li>MS Visio</li><li>Open Office</li><li>Pant Shop Pro</li></ul>
Client Applications - e-mail client	Client Applications - web browser	Client Applications - Security
<ul style="list-style-type: none"><li>Eudora</li><li>Mutt</li><li>Mush</li><li>Thunderbird</li></ul>	<ul style="list-style-type: none"><li>Mozilla Firefox browser</li><li>Mozilla browser</li><li>MS Internet Explorer</li></ul>	<ul style="list-style-type: none"><li>Norton Anti-virus</li></ul>
Client Applications - Web production Design Software	Server Applications - Development tools	Server Applications - Publication tools
<ul style="list-style-type: none"><li>Adobe Illustrator</li><li>Adobe Photoshop</li><li>Macromedia Design Suite (Dreamweaver, Fireworks)</li><li>MS FrontPage</li><li>MSNLive</li><li>NKVU</li><li>Web Album Generator</li></ul>	<ul style="list-style-type: none"><li>gcc</li><li>C compilers</li><li>Java SDK</li><li>vim</li></ul>	<ul style="list-style-type: none"><li>ghost</li><li>Adobe InDesign</li><li>CorelDraw</li></ul>
Applications - Connectivity	Server - Database programs	Server - Web application tools
<ul style="list-style-type: none"><li>AT&amp;T Network Client</li><li>AT&amp;T Network Desk</li><li>Kyrina</li><li>MS SQL</li><li>Nety</li><li>Skype</li><li>VNC</li><li>WebOrino</li><li>WSADP</li><li>Xshut</li></ul>	<ul style="list-style-type: none"><li>MySQL</li><li>SuperCRM</li></ul>	<ul style="list-style-type: none"><li>Apache</li><li>JBoss</li><li>Tomcat</li></ul>
Applications - Misc	Server Applications - Misc	
<ul style="list-style-type: none"><li>Hoover's online</li><li>LinkECS</li><li>Palm Desktop</li><li>openoffice and groupware</li><li>PLM</li><li>Substance</li><li>Sun</li><li>Sun Java Studio Enterprise</li><li>Tehing</li><li>Visual Architect</li><li>VisualEASE</li><li>WinZip</li><li>Xserve</li></ul>	<ul style="list-style-type: none"><li>Google Calendar</li><li>SupaBz</li></ul>	

## Baseline

Open Group	Open Group	Open Group	Open Group	Open Group	Open Group	Open Group	Open Group	Open Group	Open Group	Open Group
Item	Item	Item	Item	Item	Item	Item	Item	Item	Item	Item
...	...	...	...	...	...	...	...	...	...	...

## Gap analysis

## Service interaction model





# Data Architecture

**ENTITY: OgsysMemberView I TABLE:**  
OGSYS Member Entity View  
The Open Group IT Systems Entity Definitions

Java Name	DB Name	Field Type	Java Type	SQL Type
organizationId	MEM.ORGANIZATION_ID	id-ne	String	VARCHAR(20)
memberLevel	MEM.MEMBER_LEVEL	id-ne	String	VARCHAR(20)
status	MEM.STATUS	id	String	VARCHAR(20)
councilType	MEM.COUNCIL_TYPE	id-ne	String	VARCHAR(20)

**ENTITY: OgsysOrganizationView I TABLE:**  
OGSYS Organization Entity View  
The Open Group IT Systems Entity Definitions

Java Name	DB Name	Field Type	Java Type	SQL Type
organizationId	ORG.ORGANIZATION_ID	id-ne	String	VARCHAR(20)
formalName	PG.GROUP_NAME	name	String	VARCHAR(100)

**ENTITY: OgsysCouncilType I TABLE: OGSYS\_COUNCIL\_TYPE**  
OGSYS Council Types  
The Open Group IT Systems Entity Definitions

Java Name	DB Name	Field Type	Java Type	SQL Type
councilType	COUNCIL_TYPE	id-ne	String	VARCHAR(20)

**ENTITY: OgsysIndividualForum I TABLE: OGSYS\_INDIVIDUAL\_FORUM**  
Individual Forum Relationships  
The Open Group IT Systems Entity Definitions

Java Name	DB Name	Field Type	Java Type	SQL Type
userId	USER_ID	id-long-ne	String	VARCHAR(80)
forumId	FORUM_ID	id-ne	String	VARCHAR(20)
lastUpdatedStamp	LAST_UPDATED_STAMP	date-time	java.sql.Timestamp	DATETIME
lastUpdatedTxStamp	LAST_UPDATED_TX_STAMP	date-time	java.sql.Timestamp	DATETIME

**ENTITY: OgsysIndividualOrganization I TABLE: OGSYS\_INDIVIDUAL\_ORGANIZATION**  
Individual/Organization Relationships  
The Open Group IT Systems Entity Definitions

Java Name	DB Name	Field Type	Java Type	SQL Type
userId	USER_ID	id-long-ne	String	VARCHAR(80)
organizationId				

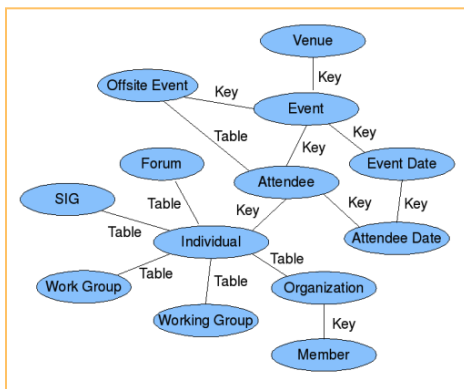
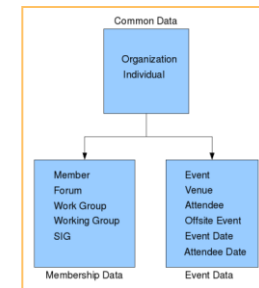
**ENTITY: OgsysMember I TABLE: OGSYS\_MEMBER**  
Members Details  
The Open Group IT Systems Entity Definitions

Java Name	DB Name	Field Type	Java Type	SQL Type
organizationId	ORGANIZATION_ID	id-ne	String	VARCHAR(20)
memberLevel	MEMBER_LEVEL	id-ne	String	VARCHAR(20)
councilType	COUNCIL_TYPE	id-ne	String	VARCHAR(20)
primaryRepresentativeId	PRIMARY_REPRESENTATIVE_ID	id-long	String	VARCHAR(60)
secondaryRepresentativeId	SECONDARY_REPRESENTATIVE_ID	id-long	String	VARCHAR(60)
billingAddressId	BILLING_ADDRESS_ID	id-long	String	VARCHAR(60)
referralName	REFERRAL_NAME	short-varchar	String	VARCHAR(60)
referralOrganization	REFERRAL_ORGANIZATION	short-varchar	String	VARCHAR(60)
applied	APPLIED	date	java.sql.Date	DATE
accepted	ACCEPTED	date	java.sql.Date	DATE
expires	EXPIRES	date	java.sql.Date	DATE
status	STATUS	id	String	VARCHAR(20)
notes	NOTES	very-long	String	LONGTEXT
deleted	DELETED	indicator	String	CHAR(1)
lastUpdatedStamp	LAST_UPDATED_STAMP	date-time	java.sql.Timestamp	DATETIME
lastUpdatedTxStamp	LAST_UPDATED_TX_STAMP	date-time	java.sql.Timestamp	DATETIME
createdStamp	CREATED_STAMP	date-time	java.sql.Timestamp	DATETIME
createdTxStamp	CREATED_TX_STAMP	date-time	java.sql.Timestamp	DATETIME

Relation	Relation Type
OgsysOrganization FK Name: OGSYS_PTY_ID	one: 1) organizationId : aa
OgsysIndividual FK Name: OGSYS_PRI_REP	one: 1) primaryRepresentativeId : userId
OgsysIndividual FK Name: OGSYS_SEC_REP	one: 1) secondaryRepresentativeId : userId
OgsysIndividual FK Name: OGSYS_BILL_ADDR	one: 1) billingAddressId : userId

## Core data entities



## Entity relationships

# Technology Architecture

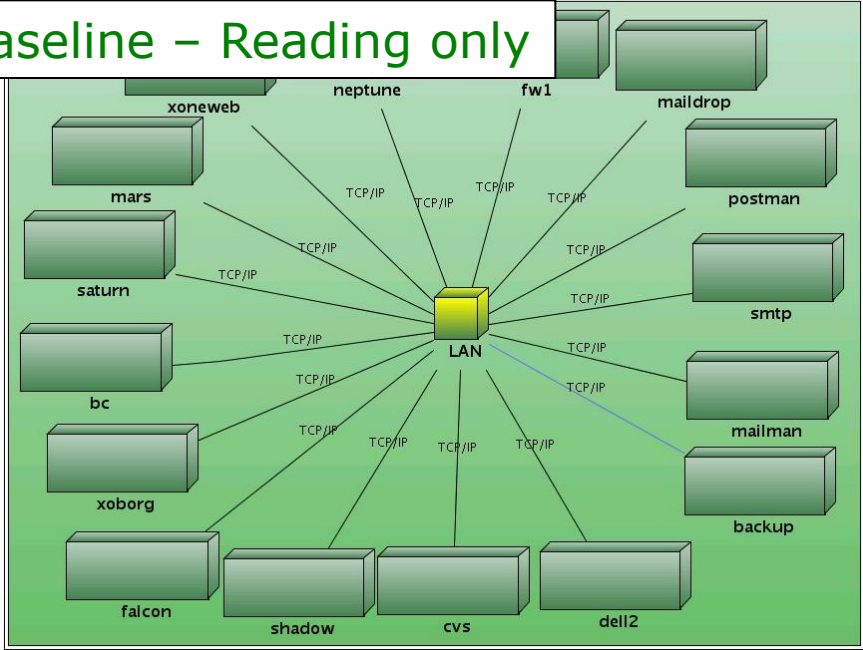
Platform	Internet	Tools
<b>Operating system:</b>	<b>Mailing infrastructure:</b>	<b>Office tools:</b>
<ul style="list-style-type: none"> <li>• UNIX (Solaris, AIX, HP-UX)</li> <li>• Linux</li> <li>• Windows</li> </ul>	<ul style="list-style-type: none"> <li>• Sendmail</li> <li>• Procmail, Smartmail, Qmail</li> <li>• Spam Assassin, MilterSender, MilterSpamC</li> <li>• NetSrvD, ArchD (Middleware)</li> </ul>	<ul style="list-style-type: none"> <li>• MS Office – Word, Excel, PowerPoint, Project</li> <li>• VISIO</li> <li>• Adobe – Acrobat Reader/ Distiller</li> <li>• E-fax</li> </ul>
<b>Databases:</b>	<b>Web Server:</b>	<b>Web Production Design software:</b>
<ul style="list-style-type: none"> <li>• MySQL, Oracle, Informix</li> </ul>	<ul style="list-style-type: none"> <li>• Apache, Appache SSL</li> </ul>	<ul style="list-style-type: none"> <li>• Dreamweaver, studio MX</li> <li>• PHP, TPL</li> <li>• Adobe Indesign</li> <li>• Adobe Photoshop CS</li> <li>• MS FrontPage</li> </ul>

Target – data center only

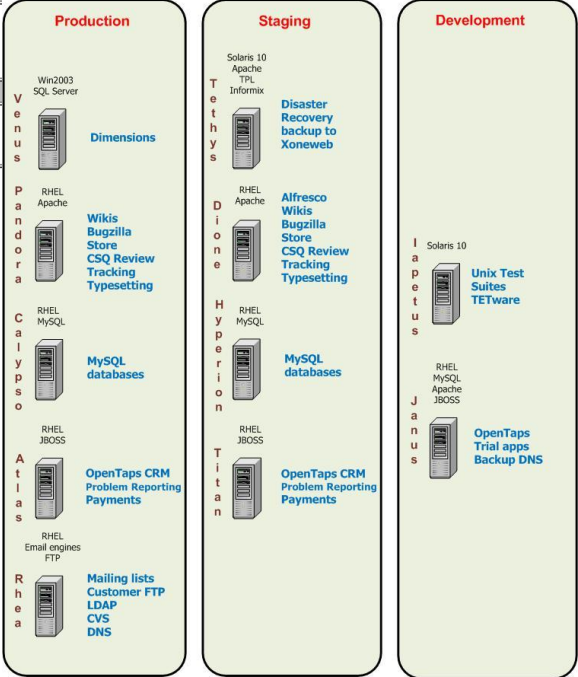
Server Environment Architecture

Reading

Baseline – Reading only



development tools:
<ul style="list-style-type: none"> <li>• Oxygen Editor Professional</li> <li>• XML Spy</li> <li>• Jitterbug (Bug tracking)</li> </ul>
isc:
<ul style="list-style-type: none"> <li>• CD Burner, Scanner</li> <li>• Alchemy Phone</li> </ul>



# Phase E: Opportunities & Solutions

- Establish evaluation criteria
  - Relevant principles
  - Business goals and drivers
  - Painpoints
  - Cost
  - Ability to deliver architecture
- Evaluate
  - Solution selection against evaluation criteria
  - Evaluation Report and recommendations
  - Governance Review (go – no go – next steps)
- Results
  - Selected LAMP based CRM solution

De-customization		Status: Draft 0.1
Statement:	Having established our requirements and found the solution of best fit, we will amend our requirements rather than require custom amendments to the solution.	
Rationale:	The Open Group is not unique in many of its business processes and industry solutions have been invented to address them. Customization incurs cost and causes problems of support as well as potentially opening up additional security risks.	
Implications	Cost, security, business continuity.	
	The implication is that we will modify the business process to fit the solution	

# Evaluation Report

## Evaluation Report

This document gives an evaluation report against the enterprise and project specific goals and objectives detailed in the ~~QESs~~ ~~Coopetec~~ Pilot Project Plan. This document also details the issues and risks with continuing to use this CRM technology in both the Association Enterprise and the Corporate Enterprise. This document concludes with recommendations and proposals for next steps.

### Enterprise Level Goals

Evaluation Criteria	Evaluation Report
Our Systems shall be simple, professional and intuitive.	<p>The system has been designed so that minimal training is required for users. The system uses standard web-based forms and controls that are familiar to the average internet user.</p> <p>The system has been designed to look professional from the user interface. Care has been taken to trap user errors and inform the user as to the cause of the problem and how to correct it.</p> <p>Interfaces have been designed to be as straightforward as possible using an uncluttered approach, with on-screen messages to help direct the user where appropriate.</p>
Reduce the amount of staff effort in using our systems	<p><del>QESs</del> allows staff to enter the system and change details from one application. There will not be the need for staff to enter the same information in two different places using two different applications for example.</p> <p>See below for one issue, that is only want a user to see the information relevant to them when they log in.</p>
Remove dependencies	<p>The pilot system has been developed from the ground up, with no dependencies on the existing technology and systems.</p> <p>We have been careful to choose standard vendor-neutral open source solutions that rely on skill-sets that are freely available on the job marketplace. The development technologies are based around LAMP and Java.</p> <p>The pilot system is not based on the Informix database, or the existing TPL programming language. The only existing dependency is that to check a member is TOGAF/ITAC</p>

## Issues

Although the system has a lot of inbuilt functionality, that functionality is not necessarily how we would ideally like it. For this reason we have had to implement some workarounds to the way that the underlying ~~QESs~~ system is created. This is not an issue with the Association as we have managed to create workarounds. However, that is not to say that we have found all issues that might be found if we rolled this out to the corporate systems. Examples of the issues that he have found so far are,

- Addresses mandate that there is a postcode filed in. This is ok, but when we import data and there is no postcode then we would have to enter some dummy data. We can pre enter something like 'Please enter your postcode' so that people know that they have to supply a postcode when they update their details

## Recommendation

There are several aspects of the ~~QESs~~ ~~Coopetec~~ CRM technology that could yield showstoppers and prevent its deployment in our corporate and association enterprise environments ~~QESs~~ are:-

### SOA

~~QESs~~ implements an Remote Method Invocation (RMI) interface which exposes all ~~QESs~~ ~~Coopetec~~. However, this does impose a requirement / constraint on the deployment of the CRM system in the enterprise environment. This restriction is that all applications accessing data in the CRM system and the CRM system itself must be located behind the same firewall.

### Access Control

We need to see who is logging in to the system and only allow them access and views of the information they require. At the moment anyone logging in can view all the data tabs in the CRM system.

### Scalability

We need to be able to load test / stress test the systems before we deploy systems. We can't afford to expend the effort and cost of building systems only to then discover they run at unacceptable levels of performance. We need to introduce this capability into our enterprise architecting.

### Accounts Receivable

We have a requirement that the accounts receivable functionality is resident in the CRM system. There are no modules in the ~~QESs~~ suite that provide this functionality to our requirements. We need to develop this functionality so it is consistent from the user viewpoint that this functionality is CRM driven. We also need to prove the interface(s) between the CRM technology and selected Finance system technology.

It is recommended these issues are resolved (without any shadow of a doubt remaining as to their eventual use in the enterprise architecture) and hence become firm project specific goals in the next pilot project.

It may be that we invest in training during the course of the next pilot project to help evaluate these major concerns.

Approved

# Phase F: Migration Planning

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- ❑ Challenge:
  - The legacy Membership Database is host to 23+ applications and moving all of these simultaneously was considered to involve an unacceptable degree of risk
- ❑ Strategy to overcome challenge:
  - Create a synchronization mechanism between the new CRM and the legacy Membership Database
- ❑ Architectural benefit:
  - Maintains control of scope

# Phase G

- ❑ Implementation Governance
  - Ensure approvals are in place
- ❑ Architecture Compliance Review Template

Architecture Compliance Review Template

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<b>Name of Project</b>	Membership and Conference Registration System
<b>Project Owner</b>	Darren Hawley
<b>Date of submission</b>	19 Nov 2008

⊕

Criteria	Report
Ensure projects comply with organization specific development processes	This development project has complied with the Open Group's development team software engineering process.
Complies with the architecture principles	The CRM complies with all architecture principles
Meets the architecture requirements placed upon it	<p>A review meeting was convened to review and agree requirements.</p> <p>Screen shots meeting the requirements were produced and reviewed by stakeholders</p> <p>User interface prototype was produced and reviewed by stakeholders against requirements</p> <p>Additional membership and conference registration test system was produced and reviewed by stakeholders against the requirements.</p> <p>A membership and conference registration test system was deployed in the staging environment and acceptance tested by stakeholders against the requirements</p>
Supports all the architecture migration strategy	The CRM system is being deployed in the enterprise architecture as defined in the Phase 1 migration strategy

Approved

<b>Approved</b>	Steve Nunn (COO)
<b>Date of approval</b>	27 Nov 2008

# Pilot review and evaluation


Meeting Objectives

Date

Attendees

Agenda

Outcome / Actions

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Making standards work<sup>®</sup>

The Open Group Enterprise Architecture  
OFBiz Opentaps Evaluation  
Pilot Review

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You are here: [TOGAF Home](#) -> [Phase E](#) -> [OFBiz Pilot](#) -> OFBiz Pilot Review

**Meeting Objectives**

- To review the evaluation of the OFBiz Pilot Project
- To agree next steps and priorities moving forwards ...

**Date**

20th June 2007

**Attendees**

Steve Nunn (COO - IT Governance)  
Darren Hawley (EA Team)

**Agenda**

1. OFBiz Opentaps Evaluation Pilot  
Here we have re-engineered the Association System to use the OFBiz CRM system and added in the Membership Management. The evaluation, risks, issues and recommendations to be discussed.
2. Roll Out of OFBiz to live Association system
3. Next Steps - CRM / Finance System Integration (CRM Driven Accounts Receivable / Credit Control)
4. Other points for discussion
  - Payment Solution Pilot
  - Finance System Evaluation
  - CMS Selection and Pilot
  - IT Infrastructure off siting
  - Data Migration
  - Reporting Tool
5. Recap and Agreement of next steps and priorities for July/August

**Outcome**

- COO to take the recommendation and next steps from the [OFBiz Evaluation Report](#) and gain CEO approval to proceed as per the Next Steps.
- OFBiz will not be deployed on the live association system until the CRM / Finance pilot is complete. However, this decision will be reviewed if a substantial piece of new development is required, such as CPD.
- COO to assign effort to the Reporting Tool Business Case.
- The EA Team to pilot the Payment System using the Budapest Conference.
- By July 4th the EA Team are to complete the CMS selection and present a pilot plan for approval to the COO.
- The COO is to submit the business case for off-siting in the US to the CEO by 4th July.
- The EA Team to propose OFBiz training for approval to the COO by 27th June.
- The EA Team to propose a load / performance test / analysis tool with costs to the COO by 18th July.
- The EA Team to feed the RMI / Firewall requirements into the Data Migration Strategy.



# Requirements Management

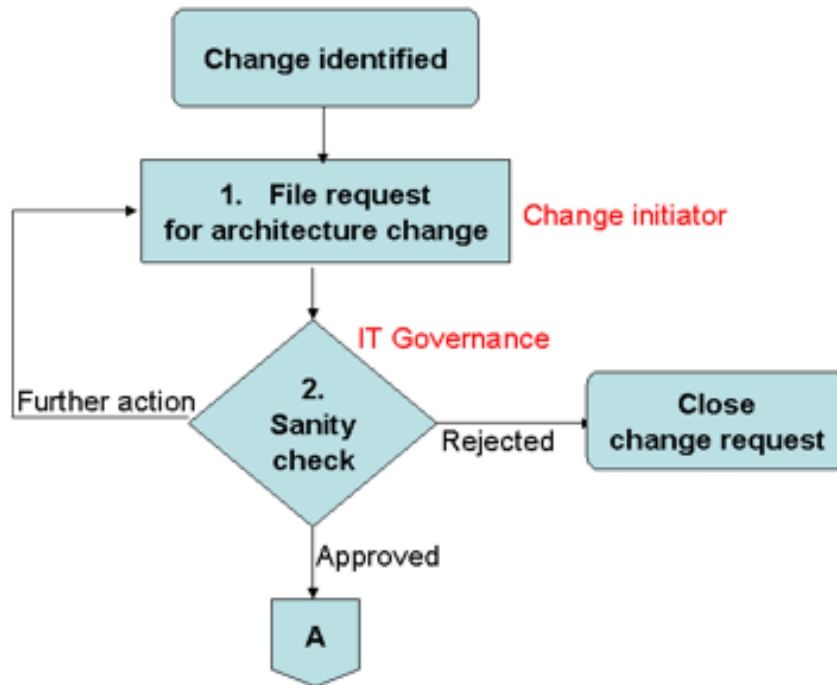




# Phase H

# Architecture Change Management

## Request for Architecture Change



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Architecture Change Request

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[As you work through this document, feel free to remove these parenthesized instructions in blue font. Overwrite where the document guides you to "Write here"]

**TITLE:** [insert one liner to describe change - remember to update File -> Properties -> Title:] Write here

**CHANGE INITIATOR:** [insert name - remember to update File -> Properties -> Subject:] Write here

**REVISION HISTORY:**

Date	Version	Comments
	0.1	Request for Architecture change completed
		Sanity Check of architecture change completed
		Request for Architecture work added
		Approval/Rejection of architecture work completed
		Request to deliver architecture work
		Approval/Rejection to make delivery of architecture work completed

# Key challenges

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- ❑ Live within existing resources
  - No budget to:
    - Hire or contract staff for the activity
    - Invest in architecture tools
- ❑ Business goal
  - Develop existing staff
    - Recognize that lack of prior experience is an acceptable trade-off
- ❑ Business reality
  - Give priority to revenue related work
    - Recognize that architecture work will often be put back
    - Insufficient resources to complete every detail of the ADM
  - Life goes on
    - The world does not stand still while we do this
    - Stakeholders have day jobs

# TOGAF Benefits

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- ❑ Forces you to think at all levels / phases
  - Avoids the leap to solution space
  - Prevents build when buy is better
  - Prevents “fixes” that have unforeseen consequences
- ❑ Encourages re-use
  - Legacy systems all had different registration processes

# Challenges to a small enterprise

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- ❑ Access to affordable expertise
- ❑ Access to affordable architecture tools
- ❑ Access to examples, sample materials etc

We could not have achieved half of what we have, without TOGAF to guide us.

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# BACK-UP

# Cube of complexity

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