

The background of the page is a light cream color. On the right side, there is a large, abstract graphic consisting of numerous thin, parallel teal lines that curve and flow downwards, creating a sense of motion and depth. The lines are more densely packed in some areas and more spread out in others, creating a wavy, organic shape.

**software** AG

# IT Planning Basic

Alfabet Reference Manual

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Documentation Version Alfabet 10.15.0

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## Conventions used in the documentation

Convention	Meaning
<b>Bold</b>	Used for all elements displayed in the Alfabet interface including, for example, menu items, tabs, buttons, dialog boxes, page view names, and commands.  Example: Click <b>Finish</b> when setup is completed.
<i>Italics</i>	Used for emphasis, titles of chapters and manuals.  this  Example: see the <i>Administration</i> reference manual.
Initial Capitals	Used for attribute or property values.  Example: The object state <code>Active</code> describes...
All Capitals	Keyboard keys  Example: CTRL+SHIFT
File > Open	Used for menu actions that are to be performed by the user.  Example: To exit an application, select File > Exit
< >	Variable user input  Example: Create a new user and enter <User Name>. (Replace < > with variable data.)
	This is a note providing additional information.
	This is a note providing procedural information.
	This is a note providing an example.
	This is a note providing warning information.

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## Chapter 1: Introduction to IT Planning Basic

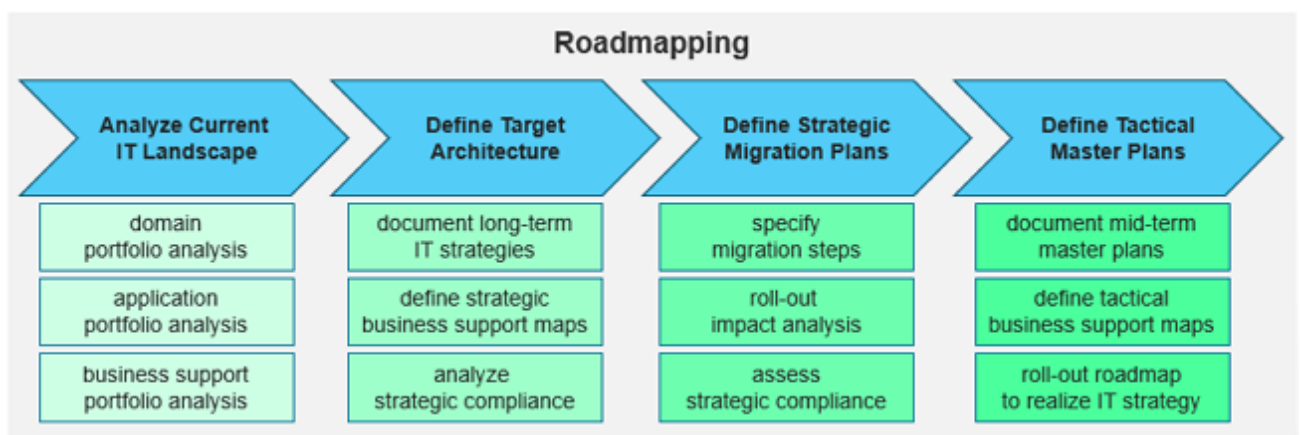
The IT Planning Basic sales package allows you to collaborate with business to transform the business model and operating model. This sales package enables you to manage the lifecycle of the IT infrastructure, thus providing relevant information about the end-of-life of the enterprise's applications and components necessary for planning the target architecture.

By means of the Business Model Definition capability, you can capture the various dimensions of the business model of the enterprise including its market products, sales channels, customer segments, markets and brands in order to understand how these operational aspects are supported by the IT. Furthermore, the IT Planning Basic sales package allows you to understand the enterprise's current operational support and conceptualize and prepare for the enterprise's medium-term and long-term IT. For an organization with a high level of maturity, the enterprise's policies and long-term strategies can be articulated to serve as the keystone in translating business strategy to strategic and tactical IT planning and moving the as-is IT landscape to a long-term target landscape.

A first step to qualify the value of IT with minor effort is to understand an application's operational business supports. A simple assignment of applications to the supported business processes reveals first high-level information about redundancies and gaps in the IT infrastructure. Later, simple impact analysis can be executed in order to ultimately plan a strategic migration from the as-is architecture to the long-term target architecture.

The Business IT Synchronization capability allows you to document your company's long-term strategic business support in the context of an IT strategy. With a clearly articulated IT strategy in place, strategic migration plans can be defined to migrate the business support and medium-term master plans can be specified to capture the roll-out of tactical business supports.

With the Target Architecture Definition capability, you can specify a master plan to roadmap the medium-term tactical business supports. Alfabet's patented master planning functionality is a keystone in translating the business strategy into IT tactics. Well-defined IT strategies show the use of applications in support of business operation and provide IT organization with a clear overview of the relevant aspects of the IT landscape in order to understand how strategic decisions will and should impact the IT's tactics and direction over time. IT strategy planners can explore tactical options for rolling-out applications, ensure that flexibility in the IT architecture is accommodated, and confirm that IT planning are in alignment with the business' strategic vision.



The IT Planning Basic sales package is used by IT and business strategists, planners and project managers as well as general leadership functions across business and IT to:

- manage the lifecycle of the architecture elements in the IT infrastructure
- understand the IT support for various aspects of the business model
- capture the enterprise's policies in order to articulate the guidelines for business
- define the company's IT strategies in terms of business support for the long-term target architecture
- design medium-term architectural scenarios via master plans and create architectural roadmaps
- create blueprints to standardize IT solutions across the enterprise
- plan and manage migrations in accordance with the IT strategies and master plans they are associated with

By implementing a disciplined planning strategy, you can support the enterprise in its goals towards standardization and simplification. Reusing the same applications for the same business process results in fewer applications, less complexity and risk, and reduced costs and maintenance efforts.

The following information is available:

- [Introduction to IT Planning Basic](#)
- [Lifecycle Management](#)
- [Business Model Definition](#)
- [Business IT Synchronization](#)
- [Target Architecture Design](#)
- [Appendix: Working with Business Support Maps](#)

## Chapter 2: Lifecycle Management

Lifecycle management is an integral part of roadmapping and necessary to establish plans to transition the operational model to a target architecture. Lifecycle management includes the process of identifying and managing conflicts in the lifecycles of objects in the IT architecture such as applications and components. Understanding the lifecycle of applications and other architecture elements in the IT infrastructure allows the enterprise to identify, for example, when new applications and components need to be introduced to support the enterprise's business processes in alignment with its strategies and vision. For a complete overview of the object classes that support lifecycle definition, see the chapter *Overview of Configurable Features for Object Classes* in the reference manual *Configuring Alfabet with Alfabet Expand - Appendix*.

Documenting and maintaining the lifecycles of ICT objects, applications, and business supports in the as-is landscape is necessary in order to design relevant architectural scenarios to design the master plans that serve as the medium-term roadmap to realize the enterprise's long-term IT strategies. A disciplined lifecycle management program ensures that migration plans can be defined and rolled-out to support master planning efforts.

A lifecycle describes the succession of stages that an architecture element goes through. Many objects (for example, applications, components, standard platforms, business supports) in Alfabet have a lifecycle, although a lifecycle does not have to be defined for all objects. A lifecycle is comprised of lifecycle phases that describe the object's status of activity or production over time. Each lifecycle phase is aligned with its preceding and succeeding lifecycle phase.

The lifecycle definition also includes the definition of the object's active period. The active period of an object is considered the period that the object is in production. Therefore, the active period of an object corresponds to the object's start and end dates. The active period may be configured to be aligned with one or more specified lifecycle phases that represent the period when the object is in production. Typically, the object state of the object will be specified as Active in the period between the start and end date.

The lifecycle definitions of dependent objects should be aligned with the lifecycle of the object that they have been defined for. For example, the lifecycles of any local components, information flows, and business supports should be aligned with the lifecycle of the application that they are assigned to. In the case of components, the lifecycles of any local components, information flows, and technical services should be aligned with the component's lifecycle.

Furthermore, the lifecycle definition for an application may include the specification of predecessor and successor versions and the lifecycle definition of components may have successor versions. Successor versions will be assigned per default to the same ICT object as the original application/component, but this can be modified, as needed.

The following information is available:

- [Methodology: Application Lifecycle Management](#)
- [Prerequisite: Configuring Lifecycles](#)
- [Managing IT Lifecycles in the Application Architecture](#)



Please note a context-sensitive Help is available for each view available in the context of lifecycle management. You should refer to the Help if you require an explanation about the functionalities and information available in a specific view.

## Methodology: Application Lifecycle Management

Application lifecycle management includes the process of identifying and managing conflicts in the lifecycles of an application and its application versions and variants in order to ensure the availability and reliability of applications in the enterprise. Each application must have an object state defined as well as a start and end date. The object state specifies the operational status of the application in the enterprise.

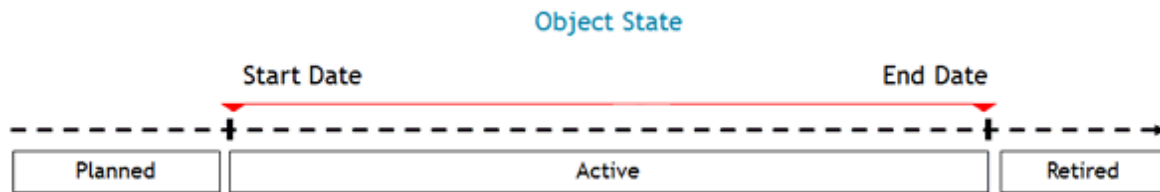


FIGURE: Application object state

The lifecycle definition includes the specification of the object's active period, which corresponds to the object's start and end dates. When the object is first created, the object state will be set to **Active** in alignment with the object's start and end dates. Even if the object state is later changed, the active period of the lifecycle will correspond to the start and end dates of the object.

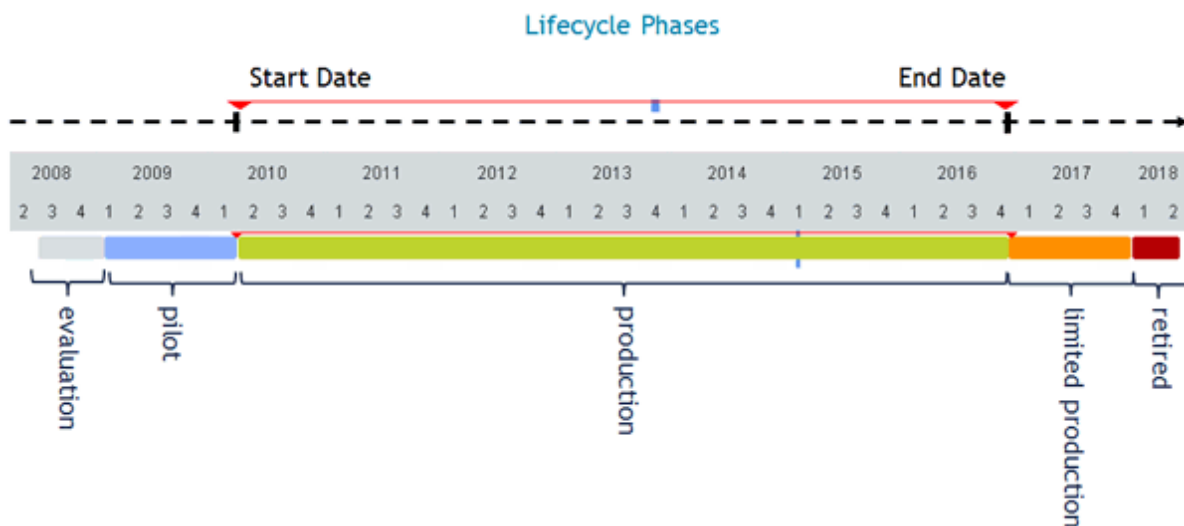


FIGURE: Application lifecycle

The application lifecycle describes the succession of stages that the application goes through. The lifecycle is comprised of lifecycle phases that describe the application's status of activity or production. In the figure above, an application lifecycle consists of the lifecycle phases Pilot, Production, Limited Production, and Retired, and the lifecycle phase Production represents the active period of the application. The definition of a start and end date is mandatory when an application is created, but the lifecycle phases must be explicitly defined for each application.

An aspect of application lifecycle management is versioning applications and managing the application versions. Versioning applications describes the transition of one version of an application to the next from the enterprise architecture point of view. Every application that you define is actually an application version with its own defined lifecycle. An application may have predecessor and successor versions, thus providing information about the migration plans for the application as well as the evolution of a specific type of business support or business service.



When an application is versioned, the new application version will become the successor version when the base application reaches its end date. The new application version's start date will be automatically defined to begin one day after the base application's end date and the new application version's end date will be defined to begin 5 years after its start date. These dates may be edited as needed.

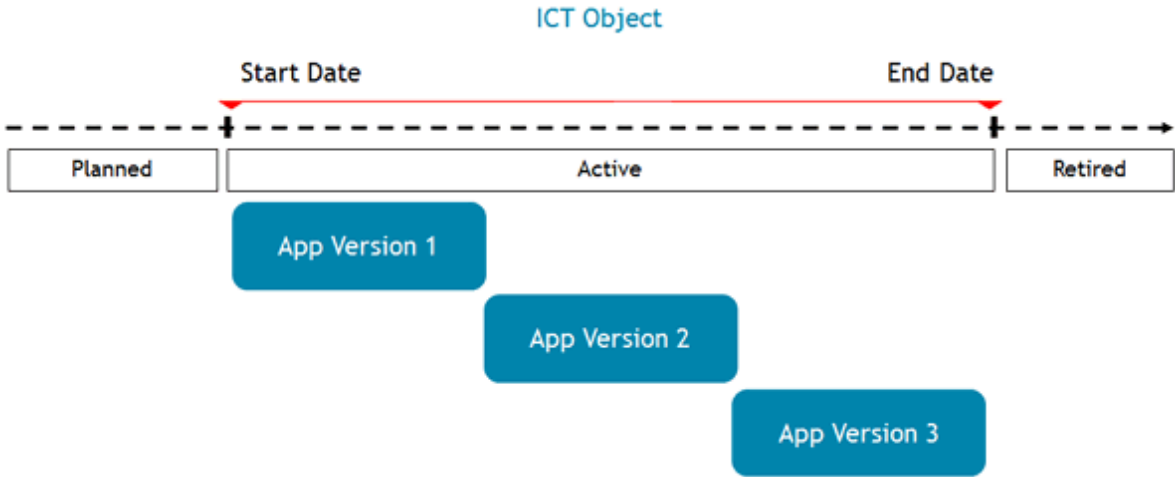
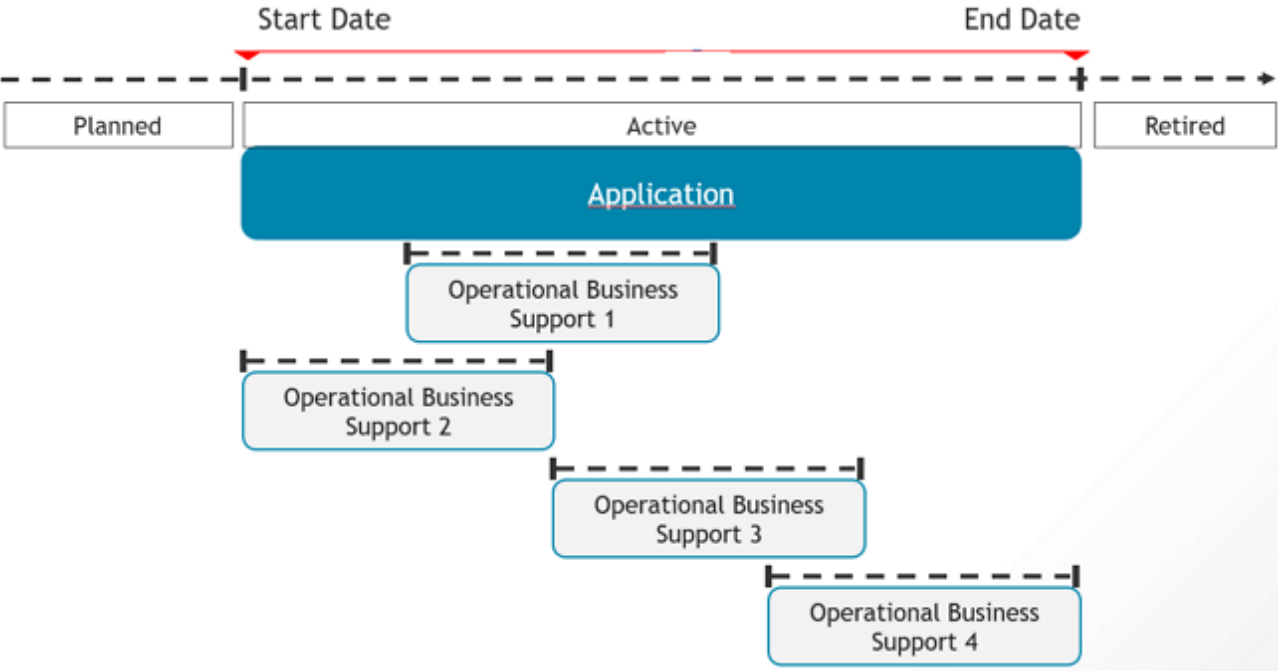


FIGURE: Versioned applications assigned to ICT object

The application version will be assigned automatically to the same ICT object that owns the application that it is versioned from. Applications are typically assigned to an ICT object in order to manage application budgets and plan the IT architecture. An ICT object (ICT = Information and Communication Technology) is an abstract object that represents applications regardless of their versioning and is a means to plan and control costs related to the application and its infrastructure. The use of ICT objects is advantageous in that the planner must not initially commit him/herself to a certain version of the application. By means of the ICT object, portfolio managers can understand the operating costs of the application. Later, at the stage of detailed strategic planning of the target architecture, the ICT object can be used to plan business supports. In the stages of master planning where an IT roadmap is being established, the ICT object can be replaced by a specific concrete application version.



In order to describe the operational support that the application provides to the many business processes in the organization, multiple business supports can be created for the application. The start and end dates of the operational business support must be aligned with the application that is the provider of the support. In other words, the start date of a business support may not be before the start date of the providing application and the end date may not be after the end date of the application.

## Prerequisite: Configuring Lifecycles

In order to define the lifecycle of any object in Alfabet, the XML object **ObjectLifeCycleManager** must be configured for the relevant object classes by your solution designer in the configuration tool Alfabet Expand. A lifecycle definition consisting of lifecycle phases can be configured for object classes that support the lifecycle concept. For a complete overview of the object classes that support lifecycle definition, see the chapter *Overview of Configurable Features for Object Classes* in the reference manual *Configuring Alfabet with Alfabet Expand - Appendix*.



Please note that lifecycle definitions cannot be configured for individual object class stereotypes. The object class stereotype will inherit the lifecycle concept of the object class that it is based on.

The solution designer will configure the number of the lifecycle phases that make up the lifecycle definition of a specific object class as well as specify the name and default duration of each lifecycle phase. The solution designer will specify which lifecycle phases shall be mapped to the active period of an object class. When an object is created, the object state will be set to **Active** per default and the active period of the object will be the period starting with the start date and ending with the end date. For example, the solution designer may configure the active period to represent the lifecycles status Pilot, Production, and Limited Production but not the lifecycle phases Evaluation and Shut Down. When a user defines an object's lifecycle phases in the **Lifecycle** editor, the lifecycle phases specified for the active period will automatically be aligned with the object's start and end dates. The actual duration of a lifecycle phase defined for an object may be manually edited in the **Lifecycle** editor available in the *Lifecycle Page View* by a user with relevant access permissions

For more information about configuring lifecycle definitions, see the section *Configuring Lifecycle Definitions for Object Classes* in the reference manual *Configuring Alfabet with Alfabet Expand*.

## Managing IT Lifecycles in the Application Architecture

The *Lifecycle Page View* page view displays a Gantt chart showing the lifecycle of a selected application, the lifecycles of its predecessor and successor versions, as well as the lifecycle of the ICT object that owns the application. Please note the following:

- The maximum period of time displayed for lifecycles in the *Lifecycle Page View* is limited to 40 years. The time displayed will be based on 20 years before the current date and 20 years after the current date.
- When an application is initially created, the start and end dates constitute the active period of the application's lifecycle. However, the various lifecycle phases that constitute the lifecycle must be explicitly defined in the *Lifecycle Page View*. The lifecycle phases can be added to the ICT object or application lifecycle in the **Lifecycle** editor. Please note the following:

- Select the ICT object or application in the Gantt chart that you want to specify and click the **Edit Lifecycle** button to open the **Lifecycle** editor.
- Set a checkmark for each lifecycle that you want to include in the application lifecycle. You should not set a checkmark for a lifecycle phase that you want to leave out of the selected object's lifecycle definition. The duration of the lifecycle phase will be determined by the default duration configured by your solution designer.
- To change the duration of the lifecycle phase, select a lifecycle phase (colored bar) in the time bar and click the handle for the start or end date. Drag the handle to define the relevant date. If you select the **Keep Phases Duration** checkbox, the adjacent lifecycle phase will retain its current time span. If you do not select the **Keep Phases Duration** checkbox, the lifecycle phase adjacent to the phase you are editing will increase or decrease proportionally.
- Each lifecycle phase must have a minimum duration of 1 day. If the phase is less than 1 day, it should be skipped.
- If you edit an application's start date and end dates or shift the active period in the **Lifecycle** editor, the lifecycle definition of any local components, information flows, or business supports associated with the application will not be automatically changed. To align the start and end dates of a selected application's dependent objects, you must use the **Shift Start/End Dates** functionality available in the object profile of the relevant application.
- In addition to defining lifecycles of the ICT objects and applications displayed in the *Lifecycle Page View*, you can also version the applications via the **Create New Version** functionality. Please note the following regarding application versioning:
  - The new application version will automatically be based on the same object class stereotypes as the base application.
  - The start date of the application version will be automatically defined to begin one day after the base application's end date. The end date will be automatically defined to begin 5 years after the start date. These dates may be edited as needed.
  - The base application's lifecycle phases will be copied to the new application version and will not be adjusted to the new start and end dates of the application version. Therefore, they must be explicitly redefined in the *Lifecycle Page View*.
  - In addition to the base application's standard and custom attributes, the following attributes will be copied from the base application to the new application version:
 

• Business Service	• Information Flow
• Business Support	• Lifecycle
• Business Data	• Local Component
• Domain	• Platform
• ICT Object	• Indicators
- The *Standard Application Diagram Page View* designed for the base application will be copied to the new application version. The application version will replace the base application in the copied diagram and the application version will be visualized as the source or target of the copied information flows. Please note however that these information flows will not inherit the design of the base information flows. The layout, color, and decoration boxes must be newly

designed for the successor information flows. For more information about designing information flows in application diagrams, see the reference manual *Designing IT Landscape Diagrams in Alfabet*.

The *Provided Business Support Page View* allows operational business supports to be defined and managed for a selected application. The start date of the operational business support may not be before the start date and the end date may not be after the end date of the application providing the business support. If the dates of operational business supports are not within the start and end dates of the providing application, they will be highlighted red. The dates of all misaligned business supports can be adjusted via the **Action > Align to Start/End Date of Application** functionality.

## Chapter 3: Business Model Definition

The Business Model Definition capability supports the definition of the various dimensions of the enterprise's business model to gain a clear understanding of the necessary resources and IT support. This capability allows you to identify key architecture areas and resources necessary to support the operational aspects of the business model including its market products, sales channels, customer segments, markets, and brands. Documenting the relevant operational aspects of the business model enables you to analyze and compare the enterprise's product offering and exposes the business areas generating value for the company.

The following information is available:

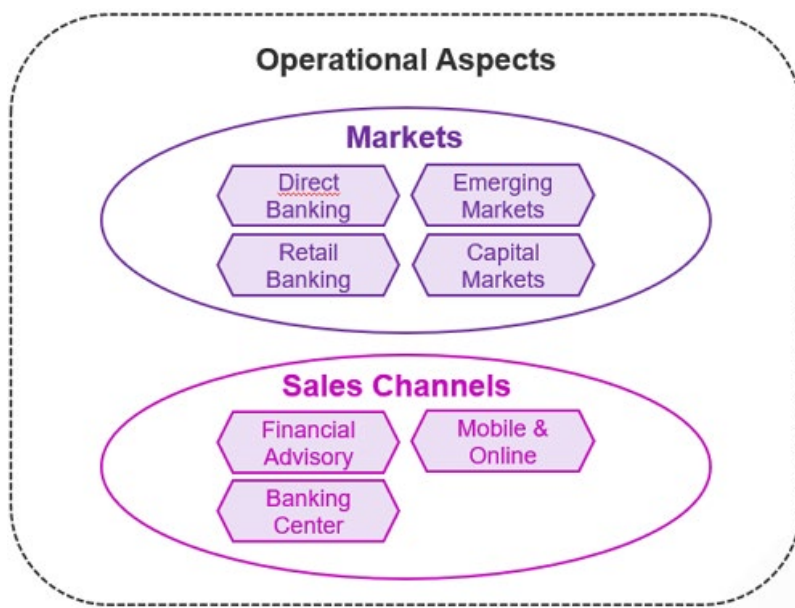
- [Methodology: Defining Operational Aspects of the Business Model](#)
- [Prerequisite: Configuring Operational Aspect Classes](#)
- [Specifying and Analyzing Operational Aspects in the Enterprise](#)



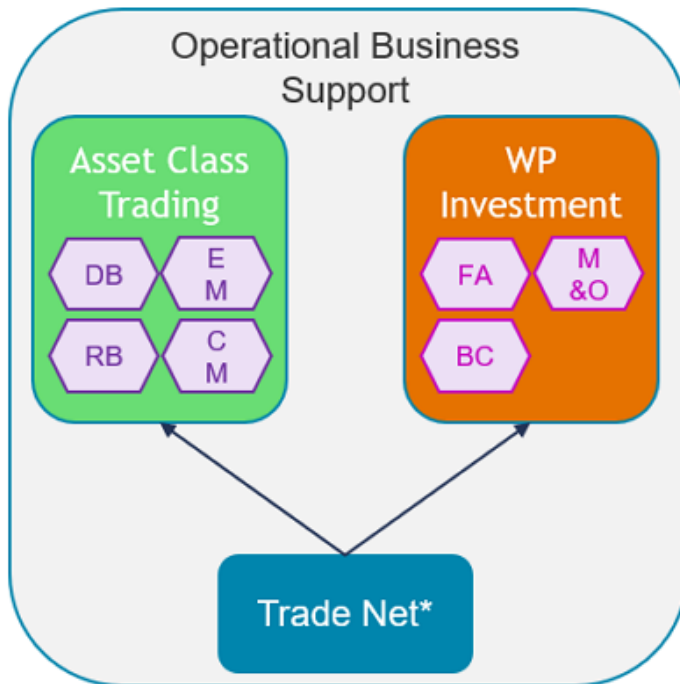
Please note a context-sensitive Help is available for each view available in the Business Model Definition capability. You should refer to the Help if you require an explanation about the functionalities and information available in a specific view.

### Methodology: Defining Operational Aspects of the Business Model

An operational aspect is a facet of the business that may be supported by the IT. In Alfabet, the classes Brand, Customer Segment, Market, and Sales Channel are standard object classes that represent typical operational aspects. However, other object classes or object class stereotypes may be configured by your solution designer as operational aspects. Multiple operational aspects can be created for each relevant object class to express the individuals facets of business that require support.



For the class Market, for example, the operational aspects Capital Markets, Retail Banking, Emerging Markets, and Direct Banking could be specified. Or for the class Sales Channel, the operational aspects Financial Advisory, Banking Center, and Mobile & Online could be defined.



In the context of planning business support in the enterprise, the IT architect or IT planner can associate the business' operational aspects with the organizations or business processes that contribute to them. In the example above, the operational aspects Capital Markets, Retail Banking, Emerging Markets, and Direct Banking are assigned to the business process Asset Class Trading and the operational aspects Financial Advisory, Banking Center, and Mobile & Online are assigned to the organization WP Investment. The operational business support provided by the application TradeNet may support any or all of the operational aspects. The specification of the operational aspects that a business support contributes to ensures an understanding of how individual operational business supports are instrumental to operational aspects of the business and sheds light on where future support via tactical business supports and strategic business supports is required in order to realize the enterprise's long-term IT strategy.



Some enterprises may specify market products on the X-dimension and domains on the Y-dimension. For the sake of simplicity, this documentation will refer to X-dimension objects as business processes and Y-dimension objects as organizations.

## Prerequisite: Configuring Operational Aspect Classes



The following information describes the configuration required to implement operational aspects in Alfabet. The conceptualization of operational aspects is dependent on the business support concept that you will implement in your enterprise. In particular, your enterprise will need to configure the object classes on the X-dimension and Y-dimension of the business support. This is explained in more detail in the section [Setting Up the X- and Y-Axes of the Business Support Map](#).

The following configuration is required in order to implement operational aspects:

- Several attributes in the XML object **ITMapDef** must be configured. The XML element `AspectClasses` must specify the object classes (`Brand`, `CustomerSegment`, `Market`, and `SalesChannel`) that can be defined as operational aspects for the object classes on the matrix axes as well as for operational business supports, tactical business supports, strategic business supports, and solution business supports. Other object classes or object class stereotypes may also be specified. Please note that the object class property `ShortName` is required in order to visualize the operational aspects in a very small attributes box in cells in business support matrices. Please note that the short name should consist of only 2 or 3 letters. For additional details about configuring operational aspect classes in the context of business support planning, see the section *Configuring Standard Business Support Matrices* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- If object class stereotypes shall be specified in the XML element `AspectClasses`, these must be configured. Please note that the object class property `ShortName` must be available for the object class stereotype. For more information about configuring object class stereotypes, see the section *Configuring Object Class Stereotypes for Object Classes* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- Depending on the object classes that may be specified as operational aspects, the following functionalities must be available to the relevant user profiles for which creating operational aspects shall be permissible:
  - *Capture Brands Functionality*
  - *Capture Customer Segments Functionality*
  - *Capture Markets Functionality*
  - *Capture Sales Channels Functionality*

## Specifying and Analyzing Operational Aspects in the Enterprise

Potential gaps or redundancy in the support of operational aspects can be understood and analyzed in the context of business support maps that depict the as-is architecture, the medium-term to-be architecture, and the long-term target architecture:

- **Create Operational Aspects:** Operational aspects must first be created before they can be made available for business support planning: Please note the **Short Name** attribute must be defined for each the brand, customer segment, etc. The short name will be displayed in a very small attributes box on the business supports in business support maps. Therefore, the short name should consist of only 2 or 3 letters. Operational aspects must be created in the following views, depending on the object classes that may be specified as operational aspects.
  - *Capture Brands Functionality*
  - *Capture Customer Segments Functionality*
  - *Capture Markets Functionality*
  - *Capture Sales Channels Functionality*
- **Assign Operational Aspects to Business Processes and Organizations:** Once the operational aspects (brands, custom segments, markets, etc.) have been created, they can be assigned to the relevant object classes that represent the X- and Y-dimensions of a business support. These are

typically business processes (X-dimension) and organizations (Y-dimension). This is done in the *Operational Aspects Page View* available in the object profile of the respective object.

- **Specify Operational Aspects for Operational Business Supports:** In the context of creating operational business supports for the as-is architecture, you can specify which operational aspects shall be supported by which business supports. When an operational business support is created, all operational aspects assigned to the business process or organization (or domain or market product) supported by the business support will be displayed in the **Aspects** tab of the **Operational Business Support** editor. A checkmark should be set for each operational aspect that the business support provides support to. The **Operational Business Support** editor is available in all views where operational business supports can be created including, for example, the *Business Support Page View* for business processes, organizations, domains, market products, and applications as well as the *Business Support Map Page View* available for a master plan map or IT strategy plan.
- **Analyze the Business Supports Contributing to an Operational Aspect:** It is also possible to understand all business supports that contribute to an operational aspect. The *Business Support Map Report (As Aspect) Page View* available in the object profile of the selected operational aspect (for example, the object profile of the brand, customer segment, etc.) displays all operational, tactical, and strategic business supports that contribute to the operational aspect as well as the supported business processes on the X-axis and the supported organizations on the Y-axis. The following analyses are useful to understand the business support:
  - To display the operational aspects on the business support, select **View Options > Show Attributes** checkbox. The attributes box is overlaid on the business supports in the matrix and displays the object state in the first row and the operational aspects in the second and third rows. This view helps you to understand how business supports with the same provider may differ in terms of the operational aspects that they support.
  - To understand whether a business support consistently contributes to a set of operational aspects across multiple business processes, select **View Options > Join Items** checkbox. Only adjacent business supports with a common set of operational aspects will be joined on the X-axis.
- **Analyze the Alignment of Operational Aspects for a Business Support Provider:** Typically an application will be the provider of business support, although it is also possible that an organization may be the business support provider. A *Business Support Map Report Page View* is available in the object profile of the business support provider and displays all business processes and organizations that the provider supports. The X-axis displays the business processes supported by the provider and the Y-axis will display the organizations supported by the provider. Additionally, any other business supports supporting any of the business processes on the X-axis or organizations on the Y-axis will be displayed. These additional business supports can be hidden from view by showing only the business supports provided by the selected base object. Similar to the *Business Support Map Report (As Aspect) Page View* described above, you can also select the **Join Items** checkbox to display whether business supports consistently contributes to a set of operational aspects across multiple business processes.
- In the context of the IT strategy planning and master planning, the analysis of operational aspects can be relevant when planning the long-term target architecture as well as the medium-term to-be architecture. This is described in more detail in the sections [Business IT Synchronization](#) and [Target Architecture Design](#) respectively. The following can be carried out:
  - **Specify Operational Aspects for Tactical and Strategic Business Supports:** Similar to the definition operational aspects for operational business supports, operational aspects can be explicitly defined for a tactical or strategic business support when it is created in the *Tactical*



*Business Support Page View* or *Strategic Business Support Page View* or in the *Business Support Map Page View* available for a master plan map or IT strategy plan. It is also possible to create a tactical business support or strategic business support based on an existing operational business support. In this case, the operational aspect definition will be copied and can be modified if needed.

- **Analyze the Alignment of Operational Aspects in an IT Strategy:** At the stage of defining the target architecture and master planning, you can define strategic business supports for a specific IT strategy as well as define the tactical business supports for the master plans that serve as the roadmap to the target architecture. Additionally, you can analyze how the tactical and strategic business supports contribute to the operational aspects relevant for business processes and organizations. The specification and analysis of a target architecture in alignment with the enterprise's IT strategy and master plans for the medium-term to-be architecture is complex and thus described in detail in the sections [Business IT Synchronization](#) and [Target Architecture Design](#).

## Chapter 4: Business IT Synchronization

Alfabet provides a Business IT Synchronization capability that supports the synchronization of the business and the IT in order to help decision-makers make better IT investment decisions and reduce transformational risks. IT structures can be aligned with business objectives and processes in order to ensure that IT transformation goes hand-in-hand with business transformation.

In order to articulate the enterprise's guidelines that should be followed to ensure that business is conducted in alignment with the strategic intentions, the enterprise's business-critical policies can be captured and the facets of the IT architecture that are impacted by the policies can be identified and reviewed in regular time intervals.

The Business IT Synchronization capability supports a bottom-up definition of IT's strategic plan, ensuring that the IT architecture is developed in alignment with the companies policies and strategic intentions. Once the operational business support that is provided by applications has been captured, the current operational support can be analyzed and the enterprise's medium-term and long-term IT can be planned in the context of the enterprise's IT strategy.

Well-defined IT strategies allow the enterprise to describe the target architecture that is best suited to support the enterprise's underlying business strategy. The IT strategy represents a long-term target for the enterprise and provides the IT organization with a clear overview of the relevant aspects of the IT landscape in order to understand how strategic decisions will and should impact the IT's tactics and direction over time. IT strategy planners can explore tactical options for rolling-out applications, ensure that flexibility in the IT architecture is accommodated, and confirm that IT planning is in alignment with the business' strategic vision. The roadmap describing the medium-term tactical business supports can then be documented as described in the section [Target Architecture Design](#).

The following information is available regarding the Business IT Synchronization capability:

- [Documenting the Enterprise's Policies](#)
  - [Understanding Governance and Responsibility for Policies](#)
  - [Capturing the Enterprise's Policies](#)
  - [Associating Policies with the Enterprise's Strategic Intentions](#)
  - [Prerequisites: Configuration Required for Policy Definition](#)
- [Designing the Enterprise's IT Strategy](#)
  - [Methodology: Conceptualizing the IT Support for the Target Architecture](#)
  - [Methodology: Understanding Strategic Business Supports](#)
  - [Methodology: Conceptualizing Non-IT Support for the Target Architecture](#)
  - [Methodology: Using Blueprints to Plan the To-Be and Target Architectures](#)
  - [Understanding Governance and Responsibilities for IT Strategies](#)
  - [Specifying an IT Strategy for the Target Architecture](#)
  - [Planning the Strategic Business Support in a Business Support Map](#)
  - [Analyzing the Strategic Business Support and IT Strategy](#)
  - [Associating an IT Strategy with the Enterprise's Strategic Intentions](#)

- [Prerequisites: Configuration Required for Strategy Planning](#)



Please note a context-sensitive Help is available for each view available in the Business IT Synchronization capability. You should refer to the Help if you require an explanation about the functionalities and information available in a specific view.

## Documenting the Enterprise's Policies

One aspect of the Business IT Synchronization capability focuses on documenting and managing the enterprise's policies in order to articulate the guidelines of business that should be followed in order to ensure that business is conducted in alignment with the strategic intentions and that aspects of the IT architecture that are impacted by a policy can be identified and reviewed in regular time intervals.

A policy is a guideline or rule of business or conduct that must or should be followed by the enterprise and its constituents. A policy can be associated with a strategic intention or a principle. The policy will have a start and end date and can have a review date specified. Each policy can be associated with architecture elements that are impacted by the policy as well as the architecture elements that implement the policy. Policies can be structured in one or more policy groups.

The following information is available:

- [Understanding Governance and Responsibility for Policies](#)
- [Capturing the Enterprise's Policies](#)
- [Associating Policies with the Enterprise's Strategic Intentions](#)
- [Prerequisites: Configuration Required for Policy Definition](#)



Please note a context-sensitive Help is available for each view available in the Business IT Synchronization capability. You should refer to the Help if you require an explanation about the functionalities and information available in a specific view.


## Understanding Governance and Responsibility for Policies

A number of governance concepts are implemented in the **Policy Management** functionality :

- **Authorized User:** Each policy has an authorized user.
- **Policy Groups:** Policies may be structured in one or more policy groups. Each policy group has an authorized user. The authorized user of a policy group will have access permissions to all policies in the policy group.
- **Object Class Stereotypes:** Object class stereotype may be configured by your solution designer for the object classes **Policy** and **Policy Group**. Stereotyping allows for various governance approaches to be implemented.

## Capturing the Enterprise's Policies

Policies must be assigned to a policy group. Therefore, you must first create the policy group that you want to assign the policy to. You can create multiple policy groups. Each policy group may contain an unlimited number of policies. A policy may be assigned to multiple policy groups.

- 1) **Create a policy group.** Click the **Policy Explorer**  icon to access the *Root Policy Groups Page View*, where you can create all policy groups at the top level of the policy group hierarchy. Subordinate policy groups can be created in the *Policy Sub-Groups Page View* available for the parent policy group..
- 2) **Create a policy.** Click a policy group in the **Policy Explorer** to access the *Policies Page View*, where you can create all policies assigned to the policy group. Please keep the following in mind when creating a policy.
  - A new policy may be based on an Object class stereotype.
  - A policy will have a start and end date and may have an object state. The default state is Active.
  - A policy may have a review date.
  - A policy may have a principle associated with it. A principle is an overarching guideline that directs the enterprise architecture definition and decision-making across the company. An organization is responsible for the principle.
  - A policy may have a regulatory or legislative reference documented.
- 3) **Define the architecture objects that are impacted by the policy.** This information is captured in the *Affected Architecture Elements Page View* of the policy. All policies impacting an object are displayed in the *Affecting Policies Page View* for the affected object. The *Policies Without Affected Architecture Elements Page View* displays all policies that are not defined to impact an architecture element.
- 4) **Define the architecture objects that implement the policy.** This information is captured in the *Implementing Architecture Elements Page View*. The *Finding Policies That Are Not Implemented Page View* displays all policies that are not implemented via an architecture element.



Please note that an object may be impacted by the policy as well as an object that implements the policy.

- 5) **Redefine the policy**, if necessary. The *Redefining Policies Page View* allows you to redefine the selected policy by one or more other policies. When a policy is redefined, the selected policy is typically phased out and replaced by a more well-defined policy or a set of more granular policies. The object state of the selected policy can be changed, as needed, in the policy's object profile. If policy stereotypes have been configured, then only policies based on permissible policy stereotypes may be created to redefine an existing policy.

## Associating Policies with the Enterprise's Strategic Intentions

A policy may be associated with a strategic intention. This articulates that the strategic intention conforms to the enterprise's guidelines. A strategic intention in Alfabet is represented by the class **Value Node**. Value nodes are based on value node stereotype that are structured in a hierarchy. Value nodes assigned to a top-level value node stereotype represent a highly abstract strategic intention (for example, Become an

Integrated Financial Service Provider) whereas the leaf-level value nodes typically describe the action needed to realize the ascendant strategic intention. Thus, the value node stereotype at the lowest level usually represents strategic initiatives (for example, Establish New Credit & Loans Management Solution). The policy can be associated with a value node in the **Value Node** field in the **Policy** editor.



Strategic intentions (value nodes) can be captured, tracked, and evaluated in the context of the Business Strategy Validation capability, which is available in the IT Planning Complete sales package.

## Prerequisites: Configuration Required for Policy Definition

The following configuration is possible in order to work with policies:

- If necessary, configure object class stereotypes for the object classes **Policy** (`ITPolicy`) and **Policy Group** (`ITPolicyGroup`). Multiple hierarchies of policy stereotypes may be configured by your solution designer in the XML object **ITPolicyManager** available in the configuration tool Alfabet Expand. For more information about the configuration of policy stereotypes, see the section *Configuring the Policy Hierachy* in the reference manual *Configuring Alfabet with Alfabet Expand*.
- Configure solution requirements for each policy stereotype as you would for a conventional object class. You can configure one or more custom editors, custom selectors, custom wizards, custom object views, custom reports, etc. for each policy stereotype. You must ensure that the *Affecting Policies Page View* is assigned to the custom object view of the relevant object classes that might be defined as impacted by a policy.
- Ensure that the *Policy Explorer* (`ITPLCG_Explorer`) functionality is available for the relevant user profile(s).
- Notification monitors may be configured to inform responsible users when the policy review is impending. For more information about configuring notification monitors, see the section *Defining Notification Monitors* in the reference manual *User and Solution Administration*.

## Designing the Enterprise's IT Strategy

A first step to qualify the value of IT with minor effort is to understand an application's operational business supports. A simple assignment of your enterprise's applications to the supported business processes reveals first high-level information about redundancies and gaps in the IT infrastructure. Once the current IT landscape has been analyzed and the applications relevant for consolidation or sun-downing have been identified, one or more IT strategies can be articulated in order to plan the enterprise's target architecture. The goal is to design a strategic map that provides a long-term vision of the strategic business supports necessary for the enterprise's target architecture.

Later, simple impact analysis can be executed in order to ultimately plan the migration from the as-is architecture to the target architecture. With a clearly articulated IT strategy in place, medium-term master plans can be specified to capture the roll-out of tactical business supports and migration plans can be devised to migrate the business support. The specification of master plans for the intermediate to-be architecture is described in the chapter [Target Architecture Design](#).

The following information is available:

- [Methodology: Conceptualizing the IT Support for the Target Architecture](#)
- [Methodology: Understanding Strategic Business Supports](#)
- [Methodology: Conceptualizing Non-IT Support for the Target Architecture](#)
- [Methodology: Using Blueprints to Plan the To-Be and Target Architectures](#)
- [Understanding Governance and Responsibilities for IT Strategies](#)
- [Specifying an IT Strategy for the Target Architecture](#)
- [Planning the Strategic Business Support in a Business Support Map](#)
- [Analyzing the Strategic Business Support and IT Strategy](#)
- [Associating an IT Strategy with the Enterprise's Strategic Intentions](#)
- [Prerequisites: Configuration Required for Strategy Planning](#)



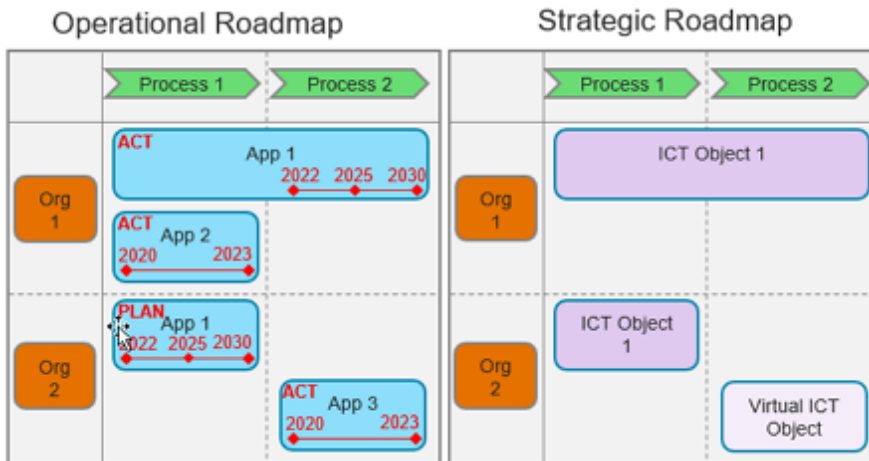
Please note a context-sensitive Help is available for each view available in the Business IT Synchronization capability. You should refer to the Help if you require an explanation about the functionalities and information available in a specific view.

## Methodology: Conceptualizing the IT Support for the Target Architecture

The target architecture represents the desired long-term status of the IT landscape without any specific timeframe or concrete references to applications. The target architecture usually resembles a strategic guideline rather than a detailed architectural plan and is captured in an IT strategy. Because the IT strategy represents a long-term target for an enterprise, it is not defined for an explicit period of time. Ultimately, the IT strategy provides direction for the master plan which represents the incremental transformation of the as-is architecture to the strategic target architecture.

The IT strategy describes the entirety of business supports that shall ideally be in use within the enterprise. Because the IT strategy is subject to regular reviews and redefinition, multiple IT strategies may exist that differ for varying long-term business scenarios. For example, an IT strategy may be defined for an assumed market growth of 40 % as well as one for a market growth of only 20%.

Planning the IT strategy allows for the analysis of the alignment of the prescribed strategic business support along the requirements of the enterprise's business processes and organizations. An IT strategy may have one or more IT strategy maps that allow strategy planning to be divided into domains of responsibility, affinity, or commonality.



The IT strategy map includes a business support map that is implemented to understand and analyze the current operational business supports and the prescribed strategic business supports. The business support map depicts the targeted state of the IT without a time frame and without the definition of specific applications as business support providers. The business support map constitutes a matrix made up of business processes on the X-axis and organizations on the Y-axis that shall be supported. The matrix cells display the strategic business supports that prescribe the future support for the business. Typically, the providers of the strategic business supports are existing or planned ICT objects or virtual ICT objects with no time-specific object state. The matrix may also display the current and approved operational business supports so that the strategic planner can understand which applications are currently in use, which might be consolidated or sundowned, and which new technologies shall be introduced.

To support strategic planning, blueprints may be drafted that provide guidelines for the strategic business support according to your enterprise's prescribed standards. Blueprints will provide information about which objects should ideally be implemented as the provider of the business support. Blueprints can be used across various IT strategies and implemented in the context of strategy planning to ensure consistency and standardization in the enterprise. The use of blueprints is described in more detail in the section [Methodology: Using Blueprints to Plan the To-Be and Target Architectures](#).

## Methodology: Understanding Strategic Business Supports

In Alfabet, a strategic business support is a planned business support defined for an unspecified timeframe in the context of the long-term target architecture. Strategic business supports typically provide support to business processes and are typically executed by organizations responsible for the business processes. In contrast to an operational business support, which has an object state and typically inherits the lifecycle of the providing application, strategic business supports are defined for an unspecified timeframe and have no object state.

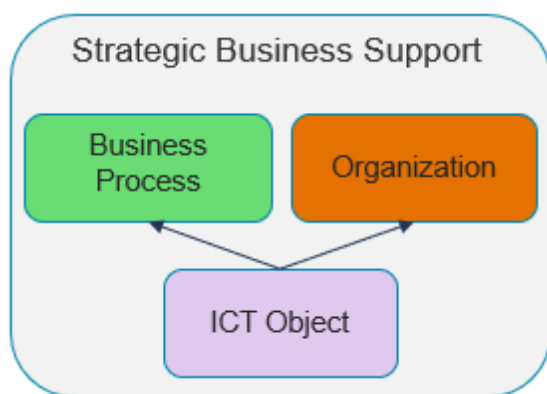


In some industry segments, it is more relevant to analyze the business support for market products than for organizations. If this is the case, market products may be configured for the Y-dimension of the business support. Furthermore, some enterprises may describe business supports to provide support to domains or business capabilities of the business rather than business processes. If this is the case, domains (business capabilities) may be configured for the X-dimension of the business support. The configuration of the X-dimension and Y-dimension of business supports will apply to operational business supports, solution business supports, strategic business supports, and tactical business supports.

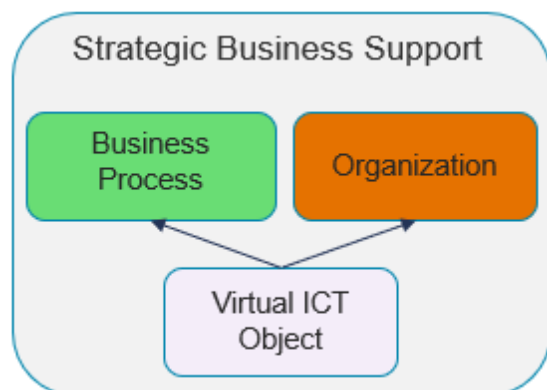
For the sake of simplicity, the documentation will describe business processes on the X-dimension and organizations on the Y-dimension of business supports and business support maps. If your enterprise uses different object classes on the X- and Y-dimensions, please substitute the appropriate object class for the X- and or Y-dimension.

Your solution designer will configure which object classes may be specified as a provider of strategic business supports. Strategic business supports may be provided by ICT objects, virtual ICT objects, solution building blocks, or organizations. It may be that more than one object class is configured to be a business support provider. Configuration requirements are described in more detail in the section [Prerequisites: Configuration Required for Strategy Planning](#).

The strategic business support typically specifies an ICT object that is planned to provide support to the enterprise to carry out its business. An ICT object is an abstract object that can represent an application regardless of its versioning.



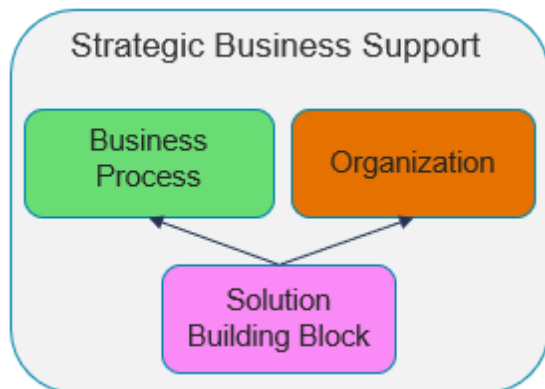
An ICT object is owned by an organization that is usually responsible for the budget of the architecture elements assigned to the ICT object. As such, ICT objects serve as a container for future applications and are key to strategy planning. The use of ICT objects is advantageous in that the planner must not initially commit him/herself to a certain version of an application. Later, at the stage of detailed master planning, the ICT object can be replaced by a specific concrete application version.,



In addition to specifying an ICT object as the provider of a business support, a virtual ICT object may be specified that represents a visionary ICT object that is not yet to be defined in the inventory but is needed ad-hoc to represent a strategic business support. Strategic business supports based on virtual ICT objects are relevant when changes are planned for the future and no decisions regarding technology have been finalized. These supports should be used very rarely. Instead, you should consider using ICT objects with a **Draft** release status so that budgets can be planned and the business architecture can be scoped.



A virtual ICT object is for planning purposes only and is not visible anywhere outside of the areas of strategy planning or master planning. The virtual ICT object can later be replaced with a real ICT object or application version.



Alternatively, if your enterprise describes its functional planning as endorsed by TOGAF, it may be that a solution building block is configured to be the provider of a strategic business support. A solution building block (SBB) supports functional planning of the target architecture. A solution building block is considered to be an abstract functional prototype of an application and thus logically sits between its governing ICT object and the specified application, component, or standard platform that will be implemented at a later date. The methodology of solution building blocks is described in more detail in the section [Methodology: Implementing Solution Building Blocks as Planning Objects](#).

Some enterprises will also opt to capture non-IT support as a form of strategic business support. Non-IT support typically consists of support via internal services, external services, shared services, etc. that are provided by organizations. For more information regarding the strategic planning of non-IT support, see the section [Methodology: Conceptualizing Non-IT Support for the Target Architecture](#).

Strategic business supports are typically created in the *Business Support Map Page View* defined for an IT strategy map that prescribes architecture scenarios relevant for the IT strategy it was created for. Strategic business supports may also be displayed in the context of a master plan map in order to provide a guideline for master planning and the creation of tactical business supports. For more information about master planning, see the chapter [Target Architecture Design](#).

### Methodology: Conceptualizing Non-IT Support for the Target Architecture

Non-IT support that supports the enterprise's business can also be specified for the target architecture. Strategic business supports as well as tactical business supports provided by organizations are relevant when changes are planned for activities conducted by service-providing organizations. Non-IT support typically consists of support provided via internal services, external services, shared services, etc.



The following information describes the requirements to non-IT support for an IT strategy, but the specification of is similar for a master plan expect that the specification occurs in the context of the *Review To-Be Architecture Functionality* and the definition is made for a master plan map (instead of an IT strategy map).



If your enterprise wants to capture non-IT support, then you must configure strategic business supports where an organization is defined as the provider. In the case of non-IT business support, a strategic business support would be modeled as follows:



Non-IT support can be captured in the context of the *Business Support Map Page View* for an IT strategy map. The methods to capture strategic business support provided by organizations is the same as for IT support provided by ICT objects. If your solution configuration allows operations to be specified as the provider of a strategic business support, then the **Create Strategic Business Support (Organization)** option will be available in the context of the *Business Support Map Page View*. For more information about creating strategic business supports, see the section [Planning the Strategic Business Support in a Business Support Map](#).



Please note that all strategic business supports captured in a business support map will also be displayed in other views such as the *Business Support Map Report Page View* available for the IT strategy map. Therefore, if you want to analyze support provided via ICT objects and support via organizations separately, it is recommended that you define two IT strategy maps for the IT strategy. In this case, one IT strategy map should be dedicated to capturing and analyzing the strategic business support provided via ICT objects and the other IT strategy map should be dedicated to capturing and analyzing the strategic business support provided via organizations. In this way, you can separately analyze the IT support and non-IT support for your enterprise.

## Methodology: Using Blueprints to Plan the To-Be and Target Architectures

A blueprint is an IT strategy or master plan that serves as a guideline for planning the business support across organizations and contributes to standardization and efficiency in the roll-out of IT support in the enterprise. In the planning process, the planner can display the blueprint in a business support map for reference purposes when defining the strategic business supports in the context of an IT strategy map as well as defining tactical business supports in the context of a master plan map. Multiple blueprints can be created for an IT strategy or master plan to address different planning scenarios.



The following information describes the requirements to define a blueprint for an IT strategy, but the specification of a blueprint is similar for a master plan expect that the specification occurs in the *Review To-Be Architecture Functionality* and the definition is made for a master plan (instead of an IT strategy).

The blueprint consists of the preferred business support map(s) to be used. In the case of a blueprint strategy, strategic business supports are specified in the *Business Support Map Page View* for an IT strategy map. The blueprint strategy can then be used to create strategic business supports in other IT strategies as well as a guideline to create tactical business supports in the context of a master plan. A blueprint can also be created showing tactical business supports in the *Business Support Map Page View* for a master plan map.

If multiple IT strategy maps have been defined for the blueprint strategy, then the blueprint definition in all IT strategy maps defined for the IT strategy will be embedded in the business support map if the blueprint strategy is selected. This allows you to copy IT strategy maps from other IT strategies and reuse or modify the blueprints for a selected IT strategy. This same concept applies to blueprints defined for master plan maps defined for a master plan.

Trading Processes	2.3.1 Asset Class Trading	2.3.2 Hedging	2.3.3 Securitization and Issuance
Trading Blueprint	Unified Trading Solution	Unified Trading Solution	Unified Trading Solution

The image above displays the blueprint specified for the IT strategy **Trading Blueprint Plan**. The proto-organization **Trading Blueprint** has been added to the Y-axis and the strategic business support **Unified Trading Solution** has been specified for the business processes **Asset Class Trading**, **Hedging**, and **Securitization and Issuance**.

### IT Strategy Map ITSM-12: Overview: Trading

Business Support Map

Blueprint

Trading Blueprint Plan

Update

New	Strategic BSP			Details	View Options	Analyze	Move/Copy
Overview: Trading	2.3.1 Asset Class Trading	2.3.2 Hedging	2.3.3 Securitization and Issuance				
Trading Blueprint	Unified Trading Solution	Unified Trading Solution	Unified Trading Solution				
FD Trading	GenLManager	Unified Trading Solution	Unified Trading Solution	GenLManager			
OR Trading							
WP Investments	Unified Trading Solution	Unified Trading Solution	Unified Trading Solution				

In the business support map for the IT strategy map **Overview: Trading** displayed above, **Trading Blueprint Plan** is selected in the **Blueprint** filter field and is now embedded in the business support map. The prescribed strategic business supports defined in the blueprint are displayed for the business processes **Asset Class Trading**, **Hedging**, and **Securitization and Issuance** in the first row in the matrix. The strategic planner can thus refer to the blueprint to plan the strategic business supports for the organizations FD Trading, OR Trading, and WP Investments. Ideally, when a business support map is defined for an IT strategy, the strategy planner will create strategic business supports that are aligned with the blueprint's business supports, but the strategy planner is free to deviate from the blueprint.

The business supports in the blueprint must be defined as you would define business supports for a conventional business support map. Information about defining a business support map is described in the sections [Planning the Strategic Business Support in a Business Support Map](#) and [Planning the Tactical Business Support in a Business Support Map](#). Please keep the following in mind when defining the blueprint:

- The IT strategy owning the blueprint must be specified as a blueprint strategy so that the blueprint may be embedded in business support maps.
- To define an IT strategy as a blueprint strategy, open the **IT Strategy** editor available for the IT strategy and set a checkmark in the **Is Blueprint** checkbox. Multiple IT strategies may be specified as blueprints, but the user will only be able to select one blueprint strategy in the *Business Support Map Page View*. Please consider the following:
  - If an IT strategy is specified as a blueprint, then the specification of the business support maps for the IT strategy maps should only provide blueprint information. General strategic planning of the target architecture should not be carried out in a blueprint strategy.
  - If multiple IT strategy maps have been defined for the blueprint strategy, then the strategic business supports of all IT strategy maps defined for the IT strategy will be displayed in the business support map if the blueprint strategy is selected.
- To define a master plan as a blueprint master plan, open the **Master Plan** editor available for the master plan and set a checkmark in the **Is Blueprint** checkbox. Multiple master plans may be specified as blueprints, but the user will only be able to select one blueprint master plan in the *Business Support Map Page View*. Please consider the following:
  - If a master plan is specified as a blueprint, then the specification of the business support maps for the master plan maps should only provide blueprint information. General master planning of the to-be architecture should not be carried out in a blueprint strategy.
  - If multiple master plan maps have been defined for the blueprint a master plan, then the tactical business supports of all master plan maps defined for the a master plan will be displayed in the business support map if the blueprint a master plan is selected.
- Only one organization should be added to the Y-axis of the blueprint's business support map. This organization is typically an abstract entity that represents a particular kind of proto-organization. In other words, only one row should be displayed on the Y-axis. If the organization assigned to a blueprint map is removed from the IT strategy map/master plan map in which the blueprint is embedded, the organization will not be removed from the blueprint. The blueprint organization and its associated business supports will continue to be displayed in business support map if the blueprint is selected in the **Blueprint** filter.
- Multiple business processes may be added to the X-axis in order to define the blueprint business supports for the respective business processes.

- Only one IT strategy map should be created per IT strategy that is specified as a blueprint strategy. However, multiple IT strategies may be specified as blueprint strategies. An existing blueprint created for an IT strategy (A) can be embedded in a blueprint created for another IT strategy (B). This allows blueprints to be reused across the enterprise. To integrate an existing blueprint in the blueprint you are currently working with, select the relevant IT strategy in the **Blueprint** filter of the *Business Support Map Page View*. When a user selects a blueprint, all blueprints embedded in the selected blueprint will be displayed. You could similarly embed multiple blueprints associated with the a master plan maps defined for a master plan.

Once a blueprint has been created, it can be embedded in a business support map in the context of an IT strategy as well as a master plan in order to provide a guideline when planning strategic and tactical business supports. The blueprint can be displayed in any *Business Support Map Page View* by selecting the relevant IT strategy in the **Blueprint** filter of the view. Please note the following:

- Business supports defined for a blueprint only provide guidance for the planning process. The business supports displayed in the business support map for a selected blueprint cannot be copied via a right-click or drag-and-drop action in order to create new business supports in the business support map. However, a mechanism to copy the blueprint business supports is available via the **Business Support Map Assistant** editor.
- If a blueprint is selected in the *Business Support Map Page View*, it will automatically be displayed in the *Business Support Map Report Page View*. The **Blueprint** filter can be changed as needed.
- The *Business Support Map Report Page View* for a master plan map allows you to select the options **View > Join Items** and **View > Y-Oriented** in order to assess the alignment of business supports defined for the blueprint organization and the organizations relevant to the master plan map..
- The *Master Plan Comparison Report Page View* for a master plan map allows you to check for alignment and standardization between two master plans and compare the tactical business supports defined in the blueprint master plan with the business supports defined in another master plan for your organization

## Understanding Governance and Responsibilities for IT Strategies

A number of governance concepts are implemented in the context of strategy planning:

- **Authorized User:** Each IT strategy has an authorized user and each IT strategy map has an authorized user. The authorized users may be different individuals.
- **Mandates:** IT strategies may be managed in a federated architecture.

## Specifying an IT Strategy for the Target Architecture

The *Plan Target Architecture Functionality* allows you to define one or more IT strategies that describe the long-term target architecture. Several target architectures may be defined that differ for varying long-term business scenarios for the enterprise. An IT strategy can be created for each alternative target architecture. For each IT strategy, you can specify multiple IT strategy maps that focus on different functional perspectives of the enterprise. The IT strategy map proposes the strategic business supports for the IT

strategy and can later be used as a guideline to define master plans and plan tactical business supports that serve as a roadmap for operational planning.

The contributors to the definition of the IT strategy include application experts who might provide functional descriptions and suggestions about the implementation of the proposed applications, business representatives who might express business needs and contribute to organizational acceptance of the strategy, and analysts and enterprise architects who might provide analyses of the current use of applications and help plan and monitor the roadmap execution. Process owners might review and approve the strategic recommendations and manage the release of the IT strategy.

The following tasks should be carried out:

- 1) **Create an IT strategy.** The IT strategy is created in the view displayed when the root node of the *IT Strategy Manager Explorer* is clicked. The IT strategy requires a name and should have an adequate description providing information about the strategy. When you create an IT strategy, you can specify whether it is a blueprint strategy to be used as a guideline for planning other IT strategies. In the planning process, strategic planners can refer to the blueprint strategy to plan strategic business supports in business support maps. The use of blueprints is explained in the section [Methodology: Using Blueprints to Plan the To-Be and Target Architectures](#).
- 2) **Create one or more IT strategy maps for the IT strategy.** An IT strategy map is the means to plan the strategic business support for a set of organizations and a set of business processes. Depending on your organization, you may create just one IT strategy map for an IT strategy or you may create multiple IT strategy maps to provide alternative scenarios for an IT strategy or to address the strategic planning needs for different organizations or business processes. An IT strategy map is created in the *IT Strategy Maps Page View* available for the IT strategy. The IT strategy map can be created from scratch or it can be created explicitly for a strategic intention (value node). If you create an IT strategy map for a strategic intention, the name of the IT strategy map will be the same as the name of the value node that it is based on. This can be changed if needed.



Strategic intentions (value nodes) can be captured, tracked, and evaluated in the context of the Business Strategy Validation capability, which is available in the IT Planning Complete sales package.

- 3) **Create IT strategy folders and structure the IT strategy maps in them,** if necessary. IT strategy maps may be grouped into folders to allow for ease in navigation and analysis. Click an IT strategy in the *IT Strategy Manager Explorer* to access the *IT Strategy Folders Page View* to create folders.
- 4) **Define the objects that are preferred as providers of the strategic business support.** An IT strategy map may feature a set of preferred architectural elements to be used when defining strategic business support in the business support map. Depending on your solution configuration, the providers of strategic business support may be ICT objects, solution building blocks, or organizations. Virtual ICT objects cannot be specified as a preferred provider. The objects that are preferred as support providers are specified in the *Preferred Objects Page View* available for the IT strategy map. The preferred objects will be available in the **Preferred ICT Objects** tab in the selector that opens when a strategic business support is created in the context of the *Business Support Map Page View*.

## Planning the Strategic Business Support in a Business Support Map

IT strategy maps allow for the analysis of the alignment of strategic business support in the IT architecture. An IT strategy map is graphically visualized in the *Business Support Map Page View*. The business support map is a matrix with an X-axis and a Y-axis. The X-axis will display the business processes that you want to plan support for and the Y-axis will display the organizations that require the support. The matrix cells consist of the strategic business supports that provide support to corresponding business processes and organizations.



In some industry segments, it is more relevant to analyze the business support for market products than for organizations. If this is the case, market products may be configured for the Y-dimension of the business support. Furthermore, some enterprises may describe business supports to provide support to domains or business capabilities of the business rather than business processes. If this is the case, domains (business capabilities) may be configured for the X-dimension of the business support. The configuration of the X-dimension and Y-dimension of business supports will apply to operational business supports, solution business supports, strategic business supports, and tactical business supports.

For the sake of simplicity, the documentation will describe business processes on the X-dimension and organizations on the Y-dimension of business supports and business support maps. If your enterprise uses different object classes on the X- and Y-dimensions, please substitute the appropriate object class for the X- and or Y-dimension.



Your solution designer will configure which object classes may be specified as a provider of strategic business supports. Strategic business supports may be provided by ICT objects, virtual ICT objects, solution building blocks, or organizations. It may be that more than one object class is configured to be a business support provider. Configuration requirements are described in more detail in the section [Prerequisites: Configuration Required for Strategy Planning](#). For an overview about strategic business supports, see the section [Methodology: Understanding Strategic Business Supports](#).

Strategic business supports may be created in the *Provided Strategic Business Support Page View* of the ICT object that shall provide the strategic business support as well as the *Strategic Business Support Page View* of a supported business process or the *Strategic Business Support Page View* of the supporting organization. Strategic business supports will typically be created in these views by the users authorized to maintain the respective ICT objects, business processes, or organizations. These datasets allow users to create strategic business supports in a simple tabular dataset.

A strategic planner will typically plan the strategic business support for the enterprise in a business support matrix that provides an overview of many business processes and organizations. Strategic business supports that have been created in the **Strategic Business Support** page views described above will automatically be displayed for the respective business process/organization in the *Business Support Map Page View* of an IT strategy map.

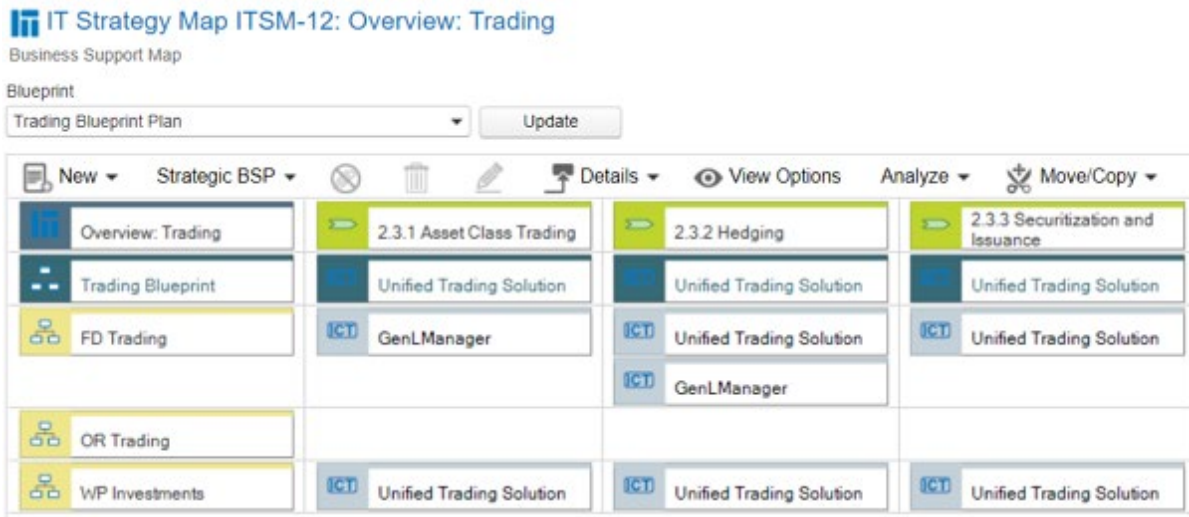


FIGURE: Strategic planning in the Business Support Map page view



Business support maps convey a wealth of information about the IT support planned in your enterprise. It is recommended that you familiarize yourself with the functionalities and view options available in business support maps before defining and analyzing your IT support. For more information about working with business support maps, see the section [Appendix: Working with Business Support Maps](#).

The following tasks are typically carried out in the *Business Support Map Page View* of an IT strategy map in order to create strategic business supports:

- Specify the business processes and organizations for which you plan to define strategic business supports on the X- and Y-axis of the business support map.** Unless your solution is configured differently, business processes will be displayed per default on the X-axis and organizations will be displayed on the Y-axis. Depending on the concept of business supports in your enterprise, domains may be implemented instead of business processes and market products may be implemented instead of organizations. Add the relevant objects to the X- and Y-axis via the **New** menu in the *Business Support Map Page View*. For more information about defining the axes of the business support map, see the section [Setting Up the X- and Y-Axes of the Business Support Map](#).
- Display a blueprint as a guideline for creating strategic business supports.** If your enterprise implements blueprint planning, select the relevant IT strategy in the **Blueprint** field. The blueprint organization will be displayed as a dark blue matrix cell and will be the first organization/market product on the Y-axis. The defined blueprint business supports will be displayed in blue in the respective matrix cells in the first row of the Y-axis. Please note that the blueprint business supports are a means of visual guidance for the planning process. The strategic business supports defined in the blueprint cannot be copied via a right-click or drag-and-drop action when creating new strategic business supports. For more information about creating blueprints, see the section [Methodology: Using Blueprints to Plan the To-Be and Target Architectures](#).
- Create new strategic business supports for the relevant business processes and organizations.** Click **Strategic BSP > Create Strategic Business Support (<Provider>)** and click in the relevant matrix cell. The business support provider you select will depend on your enterprise's methodology. If objects have been defined in the *Preferred Objects Page View*, you can select them in the **Preferred** tab in the object selector. Define the release status of the new strategic business support and provide a meaningful description about the planned strategic



business support. You can also specify the business services that the strategic business support shall provide and the operational aspects that describe the specific dimensions that will be supported via the business services.

- **Create new strategic business supports based on a copy of an existing strategic business support.** In the matrix, select the strategic business support to copy and click the CTRL key and drag-and-drop the business support to the relevant cell in the matrix. The object (ICT object, organization, solution building block, etc.) providing the business support, the release status, the provided business services, and the operational aspects will be copied to the new business support.
- **Replace virtual ICT objects providing strategic business supports with ICT objects.** In the matrix, select the strategic business support and click **New > Replace Virtual Object with ICT Object**. In the selector, select the relevant ICT object. Please note that if the strategic business support has been copied to other business processes or organizations in the business support map, all copied business supports based on the virtual ICT object will be automatically updated with the selected ICT object. If you replace a virtual ICT object with an ICT object that is already providing strategic business support to a business process and organization, you will have redundant strategic business supports in the same matrix cell. In this case, you will need to manually remove the redundant strategic business supports.
- **Move strategic business supports to a different business process or organization.** In the matrix, select the strategic business support to move and drag-and-drop the business support to the relevant cell in the matrix.
- **Remove strategic business supports that are not relevant for the IT strategy.** In the matrix, select the strategic business support and click the **Detach** button. The strategic business support will be removed from the business support map but will not be removed from the Alfabet database.
- **Delete strategic business supports that are not relevant for the strategic planning.** In the matrix, select the strategic business support and click the **Delete** button. The strategic business support will be removed from the business support map but will be irrevocably deleted from the Alfabet database.

## Analyzing the Strategic Business Support and IT Strategy



Business support maps convey a wealth of information about the IT support planned in your enterprise. It is recommended that you familiarize yourself with the functionalities and view options available in business support maps before defining and analyzing your IT support. For more information about working with business support maps, see the section [Appendix:Working with Business Support Maps](#).

The following views allow you to understand the planned target architecture in more detail:

- The *Business Support Map Report Page View* for an IT strategy map displays the prescribed business support for the selected IT strategy map. The following view options are available to analyze the strategic business support:
  - In order to understand where business supports are aligned across business processes/domains, you can display the business supports for which the same provider and aspects are defined as a single matrix object that is joined across the common business supports. In this way, you can assess where support is aligned vs. where new business

supports are needed in order to reduce misalignment. Click the **View Options** button in the toolbar to open the **Business Support Map Report Options** editor. In the **Details** tab, select the option **Join Items** to align the business supports with a common provider defined.

- In order to under the object states of business support providers, the business support, and the aspect values defined for the business support, click the **View Options** button in the toolbar to open the **Business Support Map Report Options** editor. In the **Details** tab, select the option **Show Attributes**. A small box with the information will be displayed on the right edge of the business supports in the matrix.
- Color rules allow you to cluster and color a specific set of objects in business support maps based on queries determined by your enterprise. For example, color rules could be configured to highlight operational costs of the ICT objects providing the business support. All objects found in the result set of the associated queries will be highlighted in the view. To display color rules, click the **View Options** button in the toolbar to open the **Business Support Map Report Options** editor. In the **Details** tab, select the option **Use Color Map**. The business supports will be highlight with color based on the configured color rules.
- The *Business Process Portfolio Page View* and *Organization Portfolio Page View* respectively display the business processes or organizations relevant for the selected IT strategy map. Configured portfolios allow you to understand the relative performance of the business processes/organizations based on two or three independent dimensions of measurement. For example, a portfolio could be configured by your enterprise to display the estimated risk to business processes or the significance of the business processes to the business.
- Various reports provide insight into the potential gaps or redundancy of strategic business supports on operational aspects such as brands, customer segments, markets, and sales channels. Operational aspects are relevant in the context of planning and analysis of strategic business supports and allow the strategic planner to understand the contribution that a business process or organization makes to the business. Understanding the contribution of individual business supports to operational aspects sheds light on where future support is required in order to realize the enterprise's IT strategy.
- The *Business Process/Domain Aspect Analysis Page View* for an IT strategy map provides an overview of the strategic business supports supporting the aspects relevant for a selected business process. The X-axis displays all aspects that are relevant for a selected business process. The matrix cells visualize the business supports contributing to the aspects, and the Y-axis displays all organizations that are supported by the business supports.
- The *Organization/Market Product Aspect Page View* for an IT strategy map provides of the strategic business supports supporting the aspects relevant for a selected organization/market product. The X-axis displays all aspects that are relevant for a selected organization. The matrix cells visualize the business supports contributing to the aspects, and the Y-axis displays all business processes that are supported by the business supports.
- The *Strategy Comparison Page View* for an IT strategy allows you to understand which strategic business supports are unique to and shared by the selected IT strategy and another IT strategy. For example, you could compare an IT strategy with a blueprint IT strategy to understand the degree of standardization that exists in the target architecture. The report compares which ICT objects support the business processes and organizations specified for the IT strategy maps defined for the IT strategies targeted by the comparison.

## Associating an IT Strategy with the Enterprise's Strategic Intentions

An IT strategy can be created explicitly for a value node in the *IT Strategy Maps Page View*. If this is the case, the value node will be displayed in the *Impacting Value Nodes Page View* available for the IT strategy. You can associate multiple strategic intentions with an IT strategy.

The *Impacting Value Nodes Page View* available for the IT strategy displays all value nodes that impact the selected IT strategy.



Strategic intentions (value nodes) can be captured, tracked, and evaluated in the context of the Business Strategy Validation capability, which is available in the IT Planning Complete sales package.

## Prerequisites: Configuration Required for Strategy Planning

The following configuration is necessary to work with IT strategies:

- The following must be configured in the XML object **ITMapDef** available in the configuration tool Alfabet Expand. For more information about all configuration possibilities for business matrices, see the section *Configuring Standard Business Support Matrices* in the reference manual *Configuring Alfabet with Alfabet Expand*.
  - Default object classes to display on the X-dimension and Y-dimension of business supports and business support matrices.
  - Default order of the axis objects.
  - Permissible object classes that may be the provider of strategic business supports.
  - Aspect groups and aspect values displayed on matrix objects.
  - Relevance values that allow users to filter information that lacks relevance for their current analysis of the IT landscape.
- Ensure that the *IT Strategy Manager Explorer* (ITS\_Explorer) is available for the relevant user profile(s).
- If solution building blocks are implemented in master planning, the solution designer must ensure that the **Target Architecture Planning** workspace (ICTO\_TargetArchitecture) is available in the custom object view of the relevant ICT object stereotype. The **Target Architecture Planning** workspace contains the views necessary to create and further define and analyze solution building blocks.

## Chapter 5: Target Architecture Design

Alfabet provides a Target Architecture Design capability that enables IT architects to develop a clearly documented proposal to deliver IT solutions and services that are aligned with the enterprise's IT landscape and business objectives. Alfabet's patented master planning functionality is a keystone in translating the business strategy into IT tactics and allows IT planners to define, analyze, and communicate plans for the further evolution of the core IT assets. The master plan is a highly condensed representation of the IT strategic plan, and is an easy-to-comprehend, single point of reference, hence an excellent medium for discussion at decision boards. The business supports managed in the master plan allow planners to define and communicate the roll-out plans through dedicated lifecycle definitions, explore tactical options, and ensure flexibility in the IT architecture.

Alfabet's master planning capabilities are used by IT and business strategists and planners as well as general leadership roles across the business and IT. Available functionalities support these roles to define current and future lifecycle plans for applications in the enterprise, analyze potential conflicts in the IT roadmaps, design various architectural scenarios, and ultimately specify the overall IT roadmap for the enterprise. By means of roadmapping the enterprise's to-be architecture, master planners will understand IT support for various aspects of the business thus enabling planning that is better aligned to the needs of individual business operational units. Validated blueprint master plans reduce the risk associated with the transition to a new to-be architecture and ensure the standardization of IT solutions across the enterprise. The Target Architecture Design capability supports your enterprise in standardizing and simplifying the enterprise architecture by reusing the same applications for the same business processes whenever possible, thereby executing the business's mission with fewer applications and a reduction in costs, maintenance efforts, and risks to the IT.

The following information is available regarding the Target Architecture Design capability:

- [Methodology: Conceptualizing a Roadmap for the To-Be Architecture](#)
- [Methodology: Understanding Tactical Business Supports](#)
- [Methodology: Implementing Solution Building Blocks as Planning Objects](#)
- [Specifying a Master Plan for the To-Be Architecture](#)
- [Planning the Tactical Business Support in a Business Support Map](#)
- [Analyzing the Master Plan](#)
- [Prerequisites: Configuration Required for Master Planning](#)

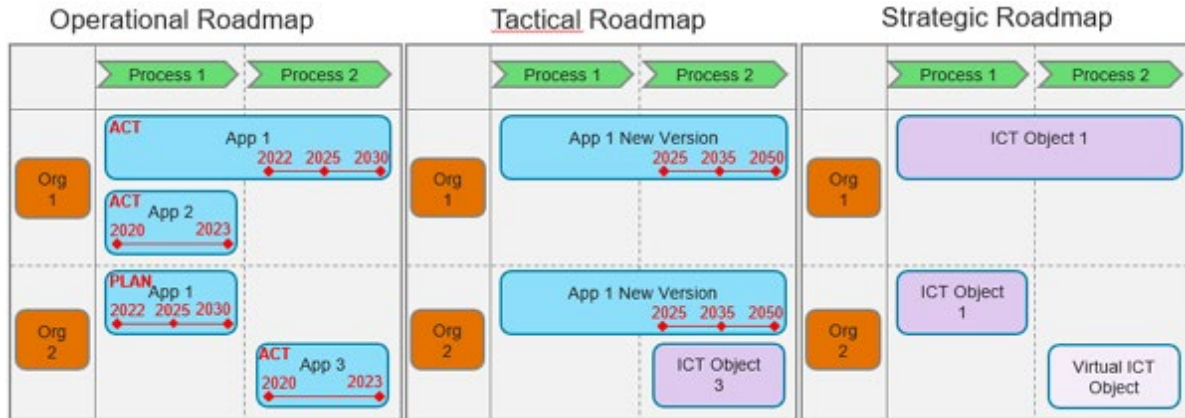


Please note a context-sensitive Help is available for each view available in the Target Architecture Design capability. You should refer to the Help if you require an explanation about the functionalities and information available in a specific view.

### Methodology: Conceptualizing a Roadmap for the To-Be Architecture

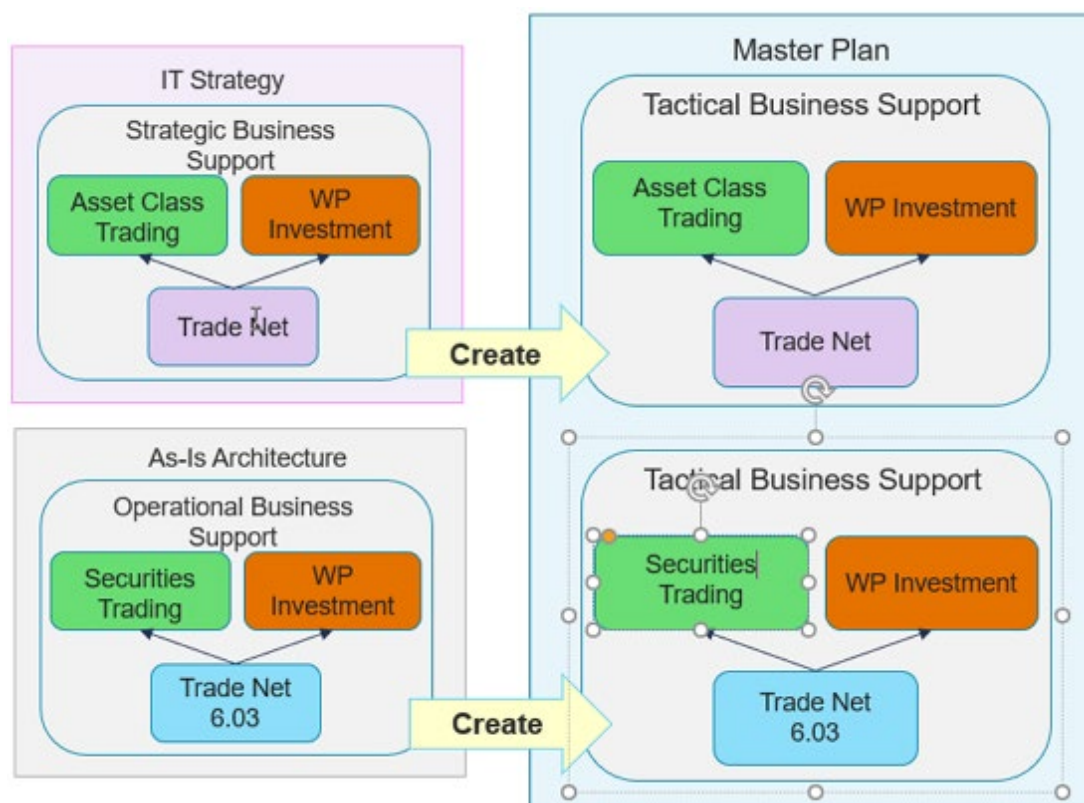
Master planning is the process of defining plans for the to-be architecture and deciding when to introduce new applications as well as when to consolidate or sundown existing applications. The to-be architecture is a medium-term plan for the enterprise's architecture and defines a clearly approved architectural guideline that is in alignment with the enterprise's IT strategy.

Master planning includes the analysis of the operational as-is architecture and a vision of the long-term target architecture in order to produce the roadmap for the IT architecture. As such, it is a mixture of bottom-up planning in terms of understanding how the as-is architecture is currently supported and may continue to be supported, and top-down planning whereby the articulated IT strategy suggests the new technologies that shall be introduced to fulfill the enterprise's vision of the IT architecture.



The planned consolidated to-be architecture is captured in one or more master plans which represent the IT roadmap - the incremental transformation of the as-is architecture to the medium-term to-be architecture and ultimately to the long-term target architecture. Ideally, an established IT strategy will provide direction for the master plan. The master plan captures the entirety of the tactical business supports that shall be planned for the enterprise's IT roadmap.

Each master plan may have one or more master plan maps, which describes the actual roll-out plan depicting how the current IT landscape will be migrated to the IT strategy. Master plan maps allow different domains of responsibility, affinity, and commonality in the IT architecture to be captured as well as alternative scenarios that may be relevant for the master plan to be drafted. The master plan map includes a business support map that is implemented to understand and analyze the current operational business support, the prescribed strategic business support, and the planned tactical business support. The business support map typically constitutes a matrix made up of the supported business processes on the X-axis and organizations on the Y-axis. The matrix cells display the tactical business supports defined to transition the support from the current as-is architecture to the strategic IT architect.



Existing operational business supports that support the displayed business processes and organizations can be included in the business support map. In this way, the tactical business supports can be created based on bottom-up planning starting with the operational as-is architecture. Operational business supports that have been retired may also be displayed. Simultaneously, prescribed strategic business supports can also be displayed to support top-down planning. The strategic business supports thus provide guidelines for the target architecture.

A matrix cell with multiple operational business supports could indicate a potential redundancy in the architecture whereas a matrix cell without any business supports could indicate a gap in the support of a business process. In this way, the master planner can understand where the same applications can be re-used for the same business processes, which applications can be consolidated or sundowned, and which new technologies shall be introduced.

Business support maps may be difficult to manage if the business support map is large and complex. In this case, one or more map views can be created for a master plan map in order to limit the business processes, organizations, and business supports displayed in the business support map. This allows the master planner to focus on specific aspects of the business support or provide map views to other authorized users that address the specific needs of that particular user involved in the master planning effort.

To support master planning, blueprints may be drafted that provide guidelines for the tactical business support based on your enterprise's standards. Blueprints provide information about which objects should ideally be implemented as the provider of the business support. Blueprints can be used across various master plans to ensure consistency and standardization in the enterprise. The concept of blueprints is described in detail in the section [Methodology: Using Blueprints to Plan the To-Be and Target Architectures](#).

Various functionalities in Alfabet support the analysis and review of tactical business support with regards to the as-is architecture, the provided business services, the time line of the roadmap, and the technical and strategic direction of the business. The master planner should review the alignment of the timeframe/lifecycles of the tactical business supports with those of the operational business supports as well as review the business services provided by the tactical and operational business supports. The

realization of the to-be architecture can be addressed by defining demands to request a change in the enterprise's IT landscape or by creating projects to initiate the action required to realize and implement the tactical roadmap and fill the gaps between the as-is and target architectures.

## Methodology: Understanding Tactical Business Supports

Tactical business supports are central to master planning. In Alfabet, a tactical business support is a prescribed business support defined for a specified timeframe in the context of the medium-term to-be architecture. Tactical business supports are typically created in the context of a master plan map in order to provide a guideline for master planning. Tactical business supports typically provide support to business processes and are typically executed by organizations responsible for the business processes.

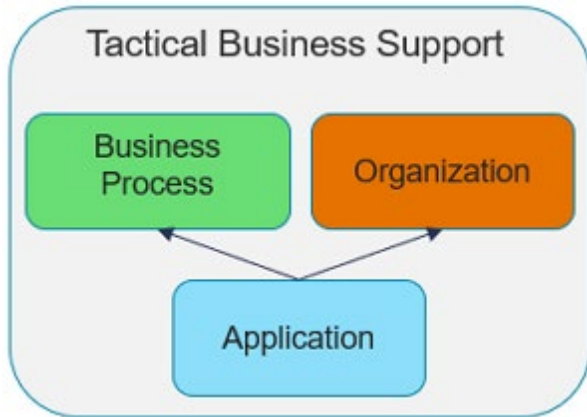


In some industry segments, it is more relevant to analyze the business support for market products than for organizations. If this is the case, market products may be configured for the Y-dimension of the business support. Furthermore, some enterprises may describe business supports to provide support to domains or business capabilities of the business rather than business processes. If this is the case, domains (business capabilities) may be configured for the X-dimension of the business support. The configuration of the X-dimension and Y-dimension of business supports will apply to operational business supports, solution business supports, strategic business supports, and tactical business supports.

For the sake of simplicity, the documentation will describe business processes on the X-dimension and organizations on the Y-dimension of business supports and business support maps. If your enterprise uses different object classes on the X- and Y-dimensions, please substitute the appropriate object class for the X- and or Y-dimension.

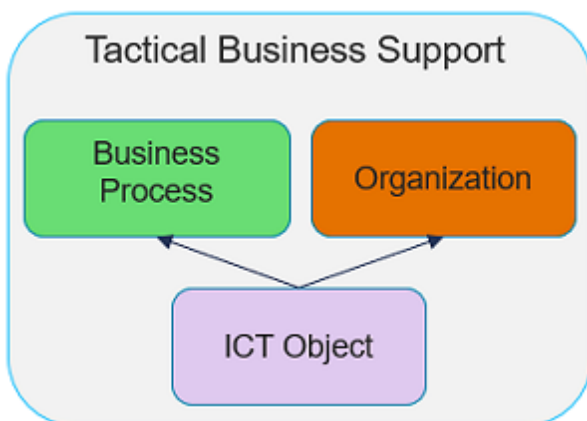
Your solution designer will configure which object classes may be specified as a provider of tactical business supports. Tactical business supports may be provided by current or planned applications, ICT objects, virtual ICT objects, solution building blocks, or organizations. Which type of object that shall be the provider of the tactical business support will depend on the master planning methodology implemented in your enterprise and the information you have available about the planned to-be architecture. It may be that more than one object class is configured to be a business support provider. For example, a convention for modeling the master plan might be to create new tactical business supports that are provided by ICT objects and make changes to existing operation business supports via tactical business supports provided by applications. Configuration requirements are described in more detail in the section [Prerequisites: Configuration Required for Master Planning](#).

Similar to operational business supports, which indicate which current or planned (approved and budgeted) applications are used in the as-is architecture, tactical business supports also have a start and end date and are thus time-related. However, tactical business supports do not have an object state and thus do not inherit the lifecycle of the application or ICT object providing the business support.



The tactical business support typically specifies an application that is planned to provide support to the enterprise to carry out its business. An application is a fully-functional integrated IT product that provides functionality to support the business to accomplish its mission. From a planning perspective, only the logical structure of applications and the business services and business supports they provide are of relevance.

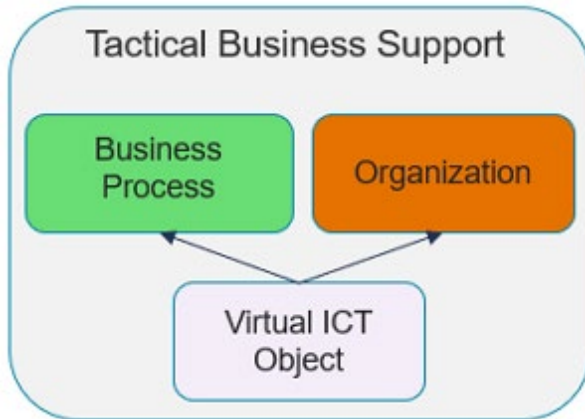
Tactical business supports based on applications are suitable when changes are planned for the near future and the application version is known. For example, when modifying the existing operational business support or phasing out an application.



An ICT object is an abstract object that can represent an application regardless of its versioning. An ICT object is owned by an organization that is usually responsible for the budget of the architecture elements assigned to the ICT object. As such, ICT objects serve as a container for future applications. The use of ICT objects is advantageous in that the planner must not initially commit him/herself to a certain version of an application. Later, at the stage of detailed master planning, the ICT object can be replaced by a specific concrete application version.

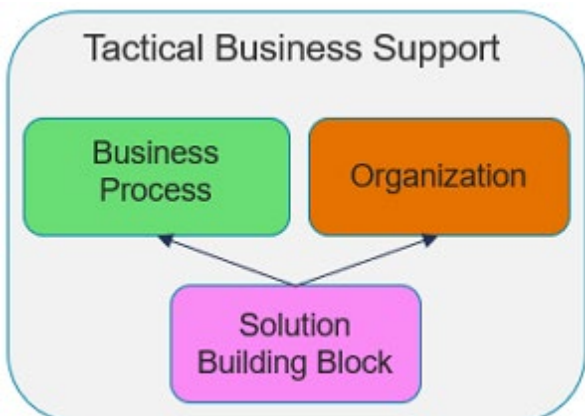
Tactical business supports based on ICT objects are relevant when changes are planned for the future (+2 years) and the application version is not yet known. For example, when completely new business supports or IT systems are to be introduced.





In addition to specifying an ICT object as the provider of a business support, a virtual ICT object may be specified that represents a visionary ICT object that is not yet to be defined in the inventory but is needed ad-hoc to represent a tactical business support. A virtual ICT object is for planning purposes only and is not visible anywhere outside of the areas of strategy planning or master planning. These supports should be used only very rarely. Instead, you should consider using ICT objects with a **Draft** release status so that budgets can be planned and the business architecture can be scoped.

Tactical business supports based on virtual ICT objects are relevant when changes are planned for the future and no decisions regarding technology have been finalized. The virtual ICT object can later be replaced with a real ICT object or application version.

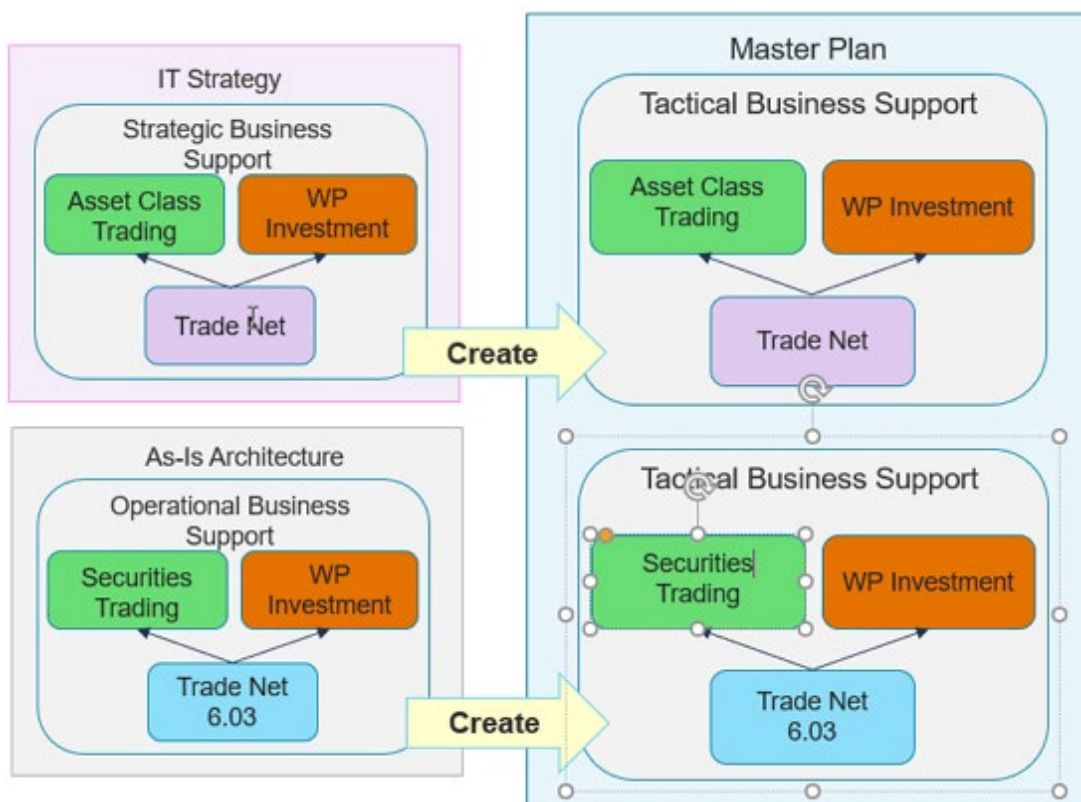


Alternatively, if your enterprise describes its functional planning as endorsed by TOGAF, it may be that a solution building block is configured to be the provider of a tactical business support. A solution building block (SBB) supports functional planning of the target architecture. A solution building block is considered to be an abstract functional prototype of an application and thus logically sits between its governing ICT object and the specified application, component, or standard platform that will be implemented at a later date. The methodology of solution building blocks is described in more detail in the section [Methodology: Implementing Solution Building Blocks as Planning Objects](#).



Some enterprises will also opt to capture non-IT support as a form of tactical business support. Tactical business supports based on organizations are relevant when changes are planned for activities conducted by service-providing organizations. Non-IT support typically consists of support via internal services, external services, shared services, etc. that are provided by organizations. The methodology to plan non-IT support via tactical business supports is similar to planning non-IT support via strategic business supports. For more information regarding the strategic planning of non-IT support, see the section [Methodology: Conceptualizing Non-IT Support for the Target Architecture](#).

Tactical business supports are typically created in the *Business Support Map Page View* defined for a master plan map that describes a particular architecture scenario relevant for the master plan it was created for.



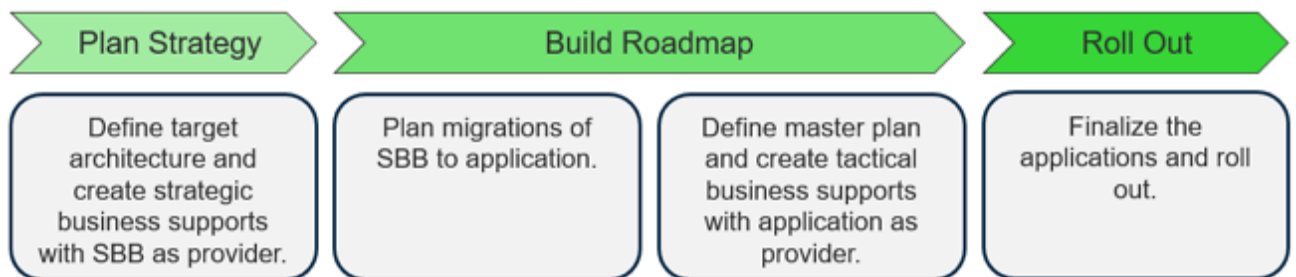
In the context of master planning, you may be able to create tactical business supports based on existing operational business supports and strategic business supports. In this way, you can plan the tactical business supports based on bottom-up planning starting with the operational as-is architecture as well as plan

the tactical business supports based on top-down planning by referring to the guidelines of the target architecture. For more information about creating tactical business supports, see the section [Planning the Tactical Business Support in a Business Support Map](#).

## Methodology: Implementing Solution Building Blocks as Planning Objects

Some enterprises adopt a TOGAF approach to IT management processes. TOGAF supports a top-down planning process whereby solution building blocks are implemented as versionless placeholders that describe the functional needs of the target landscape. These placeholders are then re-defined as applications in the course of more detailed planning. By means of solution building blocks (SBBs), the strategy planner and master planner may focus on functional planning of the long-term target architecture and the medium term to-be architecture

A solution building block is considered to be an abstract functional prototype of an application with no start and end dates and thus logically sits between its governing ICT object and the specified application, component, or standard platform that will be implemented at a later date. A solution building block may be assigned to only one ICT object, whereas an ICT object may have multiple alternative solution building blocks. The definition of the solution building block includes the business services that the solution building block targets as well as the business objects and information flows that are used by the solution building block to realize the enterprise's business functions.



In the context of master planning, a solution building block can be specified as a business support provider as well as a source or target object of a migration rule. The solution building block may be specified to provide a tactical business support or a strategic business support. If solution building blocks are implemented in strategy planning and master planning, ICT objects should only be used as governance and controlling objects. Please note that if solution building blocks are implemented as a business support provider, ICT objects should not be defined to provide business supports. In this case, only solution building blocks should be specified as providers of strategic business supports. In the case of master planning, solution building blocks should be replaced by applications as providers of operational business support.

To implement solution building blocks for strategy planning and master planning:

- **Create solution building blocks.** Solution building blocks are created in the *Solution Building Blocks Page View* in the ICT object profile. If object class stereotypes have been configured by your solution designer for the class **ICT Object**, then usually the solution building blocks shall only be defined for specified stereotypes.
- **Specify which applications, components, or standard platforms will implement the solution building blocks.** The implementation is defined in the *Solution Building Block Implementations Page View* in the ICT object profile. The object selected to be implemented must also be governed

by the selected ICT object. Only one object can be specified to implement the solution building block and an object may only implement one solution building block.

- **Define the business services provided by the solution building blocks** in the *Provided Business Services Page View* of the solution building block.
- **Define the business objects provided by the solution building blocks** in the *Business Objects Page View* of the solution building block.
- **Define the information flows exchanging the business objects provided by the solution building blocks** in the *Information Flows Page View* of the solution building block.
- **Define the components, technologies and vendor products targeted by the solution building blocks** in the *Technology Page View* of the solution building block.
- **Define the solution building block as the provider of relevant strategic business supports:** The strategic business supports can be created in the *Provided Strategic Business Support Page View* or in the *Business Support Map Page View* in the context of planning an IT strategy for the target architecture.

## Specifying a Master Plan for the To-Be Architecture

The *Review To-Be Architecture Functionality* allows you to define a master plan that describes the medium-term to-be architecture. Several to-be architectures may be defined that differ for varying medium-term business scenarios for the enterprise. A master plan can be created for each alternative target architecture. For each master plan, you can specify multiple master plan maps that focus on different functional perspectives of the enterprise. Master plan maps propose the tactical business supports for the master plan and can later be used as a roadmap for operational planning.

The contributors to the definition of the master plan include application experts who might provide functional descriptions and suggestions about the implementation of the proposed applications, business representatives who might express business needs and contribute to organizational acceptance of the master plan, and analysts and enterprise architects who might provide analyses of the current use of applications and help plan and monitor the roadmap execution. Process owners might review and approve the tactical recommendations and manage the release of the master plan.

The following tasks should be carried out:

- **Create a master plan.** The master plan is created in the view displayed when the root node of the *Review To-Be Architecture Functionality* is clicked. The master plan requires a name and should have an adequate description providing information about the strategy. When you create a master plan, you can specify whether it is a blueprint to be used as a guideline for planning other master plans. In the planning process, master planners can refer to a blueprint to plan tactical business supports in business support maps. The use of blueprints is explained in the section [Methodology: Using Blueprints to Plan the To-Be and Target Architectures](#).
- **Create one or more master plan maps for the master plan.** A master plan map is the means to plan the tactical business support for a set of organizations and a set of business processes. Depending on your organization, you may create just one master plan map for a master plan or you may create multiple master plan maps to provide alternative scenarios for a master plan. Click a master plan in the *Review To-Be Architecture Functionality* to access the *Master Plan Maps Page View*.

- **Create master plan folders and structure the master plan maps in them**, if necessary. Master plan maps may be grouped into folders to allow for ease in navigation and analysis. Click a master plan in the *Review To-Be Architecture Functionality* to access the *Master Plan Folders Page View* to create folders.
- **Define the ICT objects, applications, solution building blocks, or organizations that are preferred as providers of the tactical business support**. A master plan map may feature a set of preferred architectural elements to be used when defining tactical business support in the business support map. Depending on your solution configuration, the providers of tactical business support may be ICT objects, applications, solution building blocks, or organizations. The objects that are preferred as support providers are specified in the *Preferred Objects Page View* available for the master plan map. The preferred objects will be available in the **Preferred ICT Objects, Preferred Applications**, etc. tab that opens when a tactical business support is created in the context of the *Business Support Map Page View*.

## Planning the Tactical Business Support in a Business Support Map

Master plan maps allow for the analysis of the alignment of tactical business support in the IT architecture.

Tactical business supports may be created in the *Provided Tactical Business Support Page View* of the application or the *Provided Tactical Business Support Page View* of the ICT object that shall provide the tactical business support as well as the *Assigned Tactical Business Supports Page View* of a supported business process or the *Tactical Business Support Page View* of the supporting organization. Tactical business supports will typically be created in these views by the users authorized to maintain the respective applications, ICT objects, business processes, or organizations. These datasets allow users to create tactical business supports in a simple tabular dataset.

A master planner will typically plan the tactical business support for the enterprise in a business support matrix that provides an overview of many business processes and organizations. Tactical business supports that have been created in the **Tactical Business Support** page views described above will automatically be displayed for the respective business process/organization in the *Business Support Map Page View* of a master plan map.



Business support maps convey a wealth of information about the IT support planned in your enterprise. It is recommended that you familiarize yourself with the functionalities and view options available in business support maps before defining and analyzing your IT support. For more information about working with business support maps, see the section [Appendix:Working with Business Support Maps](#).

To capture the basic information for a master plan map in the *Business Support Map Page View*:

- **Specify the business processes and organizations for which you plan to define tactical business supports on the X- and Y-axis of the business support map**. Unless your solution is configured differently, business processes will be displayed per default on the X-axis and organizations will be displayed on the Y-axis. Depending on the concept of business supports in your enterprise, domains may be implemented instead of business processes and market products may be implemented instead of organizations. Add the relevant objects to the X- and Y-axis via the **New** menu in the *Business Support Map Page View*. For more information about defining the axes of the business support map, see the section [Setting Up the X- and Y-Axes of the Business Support Map](#).

- Display a blueprint as a guideline for creating tactical business supports.** If your enterprise implements blueprint planning, select the relevant master plan in the **Blueprint** field. The blueprint organization will be displayed as a dark blue matrix cell and will be the first organization on the Y-axis. The defined blueprint business supports will be displayed in blue in the respective matrix cells in the first row of the Y-axis. Please note that the blueprint business supports are a means of visual guidance for the planning process. The tactical business supports defined in the blueprint cannot be copied via a right-click or drag-and-drop action when creating new tactical business supports. For more information about creating blueprints, see the section [Methodology: Using Blueprints to Plan the To-Be and Target Architectures](#).
- Define the relevant display settings.** The displays settings that you define for the *Business Support Map Page View* will be inherited by the other relevant reports available for the master plan map.

  - To ensure that you can create and display tactical business supports, click the **View Options** button and set a checkmark next to the option **Show Tactical Business Support**.
  - To include existing operational business supports in the matrix, click the **View Options** button and set a checkmark next to the option **Show Operational Business Support**. The operational business supports provide information about the as-is architecture and can be used as a basis to create tactical business supports with the same provider/business process/organization.
  - To include retired operational business supports in the matrix, click the **View Options** button and set a checkmark next to the option **Show Retired Business Support**. The retired operational business supports provide information about future gaps in the IT architecture.
  - To display the target strategic business supports in the matrix, select the relevant IT strategy in the **IT Strategy** field. The strategic business supports provide information about the prescribed target architecture and can be used as a basis to create tactical business supports with the same provider/business process/organization.
- Create new tactical business supports for the relevant business processes and organizations.** Click **Tactical BSP > Create Tactical Business Support (<Provider>)** and click in the relevant matrix cell. The business support provider you select will depend on your enterprise's methodology. If objects have been defined in the **Preferred Objects** page view, you can select them in the **Preferred <Object Class>** tab in the object selector. You should define the following for the new tactical business support:

  - The start date and end date of the tactical business support. The start and end dates of the tactical business support are independent of the start and end dates of the business support provider but they must be within start and end dates of the of the business support provider.
  - The release status of the tactical business support.
  - The business services that the tactical business support will provide. The list displays all business services provided by the business support provider.
  - The operational aspects that describe the specific dimensions that will be supported via the business services.
- Create new tactical business supports based on a copy of an existing tactical business support.** In the matrix, select the tactical business support to copy and click the CTRL key and drag-and-drop the business support to the relevant cell in the matrix. The object (ICT object, organization, solution building block, etc.) providing the business support, the release status, the provided business services, and the operational aspects will be copied to the new business support.

- **Create new tactical business supports based on a copy of an existing operational business support.** In the matrix, select the operational business support to copy and click **New > Business Support Map Assistant**. In the editor, select the relevant business process and organizations for which new tactical business support shall be created. The object (ICT object, organization, solution building block, etc.) providing the business support, the release status, the provided business services, and the operational aspects will be copied to the new tactical business support.
- **Create new tactical business supports based on a copy of an existing strategic business support.** In the matrix, select the strategic business support to copy and click **New > Business Support Map Assistant**. In the editor, select the relevant business process and organizations for which new tactical business support shall be created. The object (ICT object, organization, solution building block, etc.) providing the business support, the release status, the provided business services, and the operational aspects will be copied to the new tactical business support.
- **Replace virtual ICT objects providing tactical business supports with ICT objects or applications.** In the matrix, select the tactical business support and click **New > Replace Virtual Object with ICT Object** or **New > Replace Virtual Object with Application**. In the selector, select the relevant ICT object or application. Please note that if the tactical business support has been copied to other business processes or organizations in the business support map, all copied business supports based on the virtual ICT object will be automatically updated with the selected ICT object. If you replace a virtual ICT object with an ICT object or application that is already providing tactical business support to a business process and organization, you will have redundant tactical business supports in the same matrix cell. In this case, you will need to manually remove the redundant tactical business supports.
- **Move tactical business supports to a different business process or organization.** In the matrix, select the tactical business support to move and drag-and-drop the business support to the relevant cell in the matrix.
- **Remove tactical business supports that are not relevant for the master plan.** In the matrix, select the tactical business support and click the **Detach** button. The tactical business support will be removed from the business support map but will not be removed from the Alfabet database.
- **Delete tactical business supports that are not relevant for the master planning.** In the matrix, select the tactical business support and click the **Delete** button. The tactical business support will be removed from the business support map but will be irrevocably deleted from the Alfabet database.
- **Associate the tactical business support with a project.** You can associate a tactical business support with an existing project if, for example, the business support is impacted by the project. The object providing the business support as well as the associated organization and business process will be captured as architecture elements impacted by the project. Click **Analyze > Map Objects Report**. In the view that opens, select the tactical business support in the table and click **Action > Assign Business Support to Project** and select the project that impacts the business support.
- **Associate the tactical business support with a demand.** You can associate a tactical business support with an existing demand if, for example, the business support is impacted by the demand. The object providing the business support as well as the associated organization and business process will be captured as architecture elements impacted by the demand. Click **Analyze > Map Objects Report**. In the view that opens, select the tactical business support in the table and click **Action > Assign Business Support to Demand** and select the demand that impacts the business support. You can also create a new demand for the tactical business support by clicking **Action > Create Demand**.

## Analyzing the Master Plan



Business support maps convey a wealth of information about the IT support planned in your enterprise. It is recommended that you familiarize yourself with the functionalities and view options available in business support maps before defining and analyzing your IT support. For more information about working with business support maps, see the section [Appendix:Working with Business Support Maps](#).

The following views allow you to understand the planned to-be architecture in more detail:

- The *Business Support Map Report* for a master plan map displays the prescribed business support for the selected master plan map. You can do the following:
  - Aggregate business supports to either the ICT owning the business supports providing application or to the application version that an application variant providing the support is based on in order to check for alignment in the use of applications/ICT objects. To do so, click **View Options** and select the **Aggregate to Application** or **Aggregate to ICT Object** checkboxes
  - Analyze where business supports are aligned across business processes. You can display the business supports for which the same provider and aspects are defined as a single matrix object that is joined across the common business supports. In this way, you can assess where support is aligned vs. where new business supports are needed in order to reduce misalignment. To do so, click the **View Options** button, go to the **Details** tab, and select the **Join Items** checkbox to align the business supports with a common provider defined.
  - Understand where organizations are not supporting business processes. To do so, click the **View Options** button, go to the **Details** tab, and select the **Show Direct Relationships** checkbox.
    - If a matrix cell corresponding to a business process and organization is empty, this may be problematic if the organization has been defined to execute the business process. In this case, the executing organization does not IT support to the business process.
    - If a matrix cell is filled with business supports but the organization has not been defined as the executing organization for the business process, then the IT support is not effective.
  - Review the object states of business support providers, the business support, and the aspect values defined for the business support- To do so, click the **View Options** button, go to the **Details** tab, and select the **Show Attributes** checkbox. A small box with the information will be displayed on the right edge of the business supports in the matrix.
  - Analyze the potential gaps or redundancy of tactical business supports on operational aspects in order to focus specifically on tactical business supports that are relevant to certain operational aspects important to the enterprise. Click the **View Options** button, go to the **Aspects** tab, and set a checkmark next to each operational aspect that should be included in the business support map. All business supports not associated with the selected aspects will be hidden.
- Additional reports also provide insight into the potential gaps or redundancy of tactical business supports on operational aspects such as brands, customer segments, markets, and sales channels. Operational aspects are relevant in the context of planning and analysis of tactical business supports and allow the tactical planner to understand the contribution that a business process or organization makes to the business. Understanding the contribution of individual business



supports to operational aspects sheds light on where future support is required in order to realize the enterprise's master plan.

- The *Business Process/Domain Aspect Analysis Page View* for a master plan map provides an overview of the tactical business supports supporting the aspects relevant for a selected business process. The X-axis displays all aspects that are relevant for a selected business process. The matrix cells visualize the business supports contributing to the aspects, and the Y-axis displays all organizations that are supported by the business supports.
- The *Organization/Market Product Aspect Page View* for a master plan map provides of the tactical business supports supporting the aspects relevant for a selected organization/market product. The X-axis displays all aspects that are relevant for a selected organization. The matrix cells visualize the business supports contributing to the aspects, and the Y-axis displays all business processes that are supported by the business supports.
- *Business Process Portfolio Page View* and *Organization Portfolio Page View* respectively display the business processes or organizations relevant for the selected master plan map. Configured portfolios allow you to understand the relative performance of the business processes/organizations based on two or three independent dimensions of measurement. For example, a portfolio could be configured by your enterprise to display the estimated risk to business processes or the significance of the business processes to the business.
- Various reports allow you to review the lifecycle information for the tactical business supports:
  - The *Business Support Lifecycle Page View* for a master plan map displays the lifecycles and lifecycles phases of the tactical business supports, operational business supports, and business support providers. You can edit the lifecycle information for the tactical or operational business supports displayed in the lifecycle chart.
  - The *Business Support Lifecycle Report Page View* allows you to aggregate the tactical business supports to either the applications or ICT objects that are defined to provide the support.
  - The *Consistency Check Page View* allows you to review and edit the alignment of start and end dates between tactical business supports and their business support providers
- Various reports allow you to review and compare the tactical business support definition at a more granular level:
  - The *Business Process/Domain-Based Schedule Report Page View* allows you to understand the business supports defined for a single business process (or domain). Similarly, the *Organization/Market Product-Based Schedule Report Page View* allows you to understand the business supports defined for a single organization (or market product).
  - The *Master Plan Comparison Report Page View* allows you to understand which tactical business supports are unique to and shared by two specified business process or two specific organizations.
- Business support maps may be difficult to manage if the business support map is large and complex. In this case, one or more map views can be created for a master plan map in order to limit the business processes, organizations, and business supports displayed in the business support map. This allows the master planner to focus on specific aspects of the business support or provide map views to other authorized users that address the specific needs of that particular user involved in the master planning effort. To create and analyze a map view defined for a master plan map:

- The *Map View Page View* for a master plan man allows you to create a map view and define the business processes and organizations to include in the map view. If color rules have been configured, you can select one or more color rules to cluster and color a specific set of objects in business support maps based on queries determined by your enterprise. For example, color rules could be configured to highlight operational costs of the ICT objects providing the business support. All objects found in the result set of the associated queries will be highlighted in the view. To do so, click the **View Options** button, go to the **Details** tab, and select the **Use Color Map** checkbox. The business supports will be highlight with color based on the configured color rules.



A color rule is based on one or more Alfabet queries or native SQL queries that are configured to color a found set of objects. If the color rule functionality is activated, all activated color rules will be executed and the matrix cells colored accordingly. Color rules for map views could target applications, ICT objects, solution building blocks, providing organizations, tactical business supports, tactical business supports, and operational business supports. see the chapter *Configuring Color Rules for Map Views and Diagram Views* in the reference manual *Configuring Evaluation and Reference Data in Alfabet*.


- The *Business Support Map Page View* for a map view displays the prescribed business support for the selected map view. You can do the following:
  - Modify the scope of the map view. You can hide individual business supports by selecting the business support and clicking **Map View > Exclude Selected Object from View**. You can also change the business processes and organizations displayed in the map view via the **Edit** button.
  - Aggregate business supports to either the ICT owning the business support's providing application or to the application version that an application variant providing the support is based on in order to check for alignment in the use of applications/ICT objects. To do so, click **View Options** and select **Aggregate to Application** or **Aggregate to ICT Object**.
  - Analyze where business supports are aligned across business processes/domains. You can display the business supports for which the same provider and aspects are defined as a single matrix object that is joined across the common business supports. In this way, you can assess where support is aligned vs. where new business supports are needed in order to reduce misalignment. To do so, click the **View Options** button, go to the **Details** tab, and select the option **Join Items** to align the business supports with a common provider defined.
  - Review the object states of business support providers, the business support, and the aspect values defined for the business support- To do so, click the **View Options** button, go to the **Details** tab, and select the option **Show Attributes**. A small box with the information will be displayed on the right edge of the business supports in the matrix.
  - Cluster and color a specific set of objects in business support maps based on queries determined by your enterprise. For example, color rules could be configured to highlight operational costs of the ICT objects providing the business support. All objects found in the result set of the associated queries will be highlighted in the view. To do so, click the **View Options** button, go to the **Details** tab, and select the option **Use Color Map**. The business supports will be highlighted with color based on the configured color rules.
  - Analyze the potential gaps or redundancy of tactical business supports on operational aspects in order to focus specifically on tactical business supports that are relevant to certain operational aspects important to the enterprise. Click the **View Options** button, go

to the **Aspects** tab, and set a checkmark next to each operational aspect that should be included in the business support map. All business supports not associated with the selected aspects will be hidden.

- The *Business Support Alignment Report Page View* allows you to view and analyze the compliance of business supports. You can check for the compliance of operational business supports with tactical business supports or the compliance of tactical business supports with strategic business supports. Furthermore, you can assess whether the business supports are compliant with one another on dates that you specify.
- The *Business Process/Domain-Based Schedule Report Page View* and *Organization/Market Product-Based Schedule Report Page View* allow you to review and compare the tactical business support definition at a more granular level:
- The *Business Process/Domain Aspect Analysis Page View* and *Organization/Market Product Aspect Page View* provide overviews of the tactical business supports supporting the aspects relevant for a selected business process or organization.

## Prerequisites: Configuration Required for Master Planning

The following configuration is necessary to work with master plans:

- The following must be configured in the XML object **ITMapDef** available in the configuration tool Alfabet Expand. For more information about all configuration possibilities for business matrices, see the section *Configuring Standard Business Support Matrices* in the reference manual *Configuring Alfabet with Alfabet Expand*.
  - Default object classes to display on the axes.
  - Default order of the axis objects.
  - Permissible object classes for which business supports can be created.
  - Aspect groups and aspect values displayed on matrix objects.
  - Relevance values that allow users to filter information that lacks relevance for their current analysis of the IT landscape.
- Ensure that the *Review To-Be Architecture Functionality* (ITM\_Explorer) is available for the relevant user profile(s).
- If color rules are to be implemented in map views, the color rules must be configured. This can be done in the Color Rules page view available either via the **Master Plans**  explorer icon or in the **Configuration** capability. For more information about the configuration of color rules, see the chapter *Configuring Color Rules for Map Views and Diagram Views* in the reference manual *Configuring Evaluation and Reference Data in Alfabet*.
- If solution building blocks are implemented in master planning, the solution designer must ensure that the **Target Architecture Planning** workspace (ICTO\_TargetArchitecture) is available in the custom object view of the relevant ICT object stereotype. The **Target Architecture Planning** workspace contains the views necessary to create and further define and analyze solution building blocks.

## Appendix 1: Working with Business Support Maps

A business support map is the graphic visualization of the business support provided by specified objects in order to support the planning of the short-term, medium term, and long-term to-be architecture. The map is visualized as a matrix with an X-axis and a Y-axis. The X-axis of a standard business support map will display business processes and the Y-axis will display organizations that are supported. In some industry segments, it is more relevant to analyze the business support for market products than for organizations. If this is the case, market products may be configured for the Y-dimension of the business support. Furthermore, some enterprises may describe business supports to provide support to domains or business capabilities of the business rather than business processes. If this is the case, domains may be configured for the X-dimension of the business support.

Business support maps convey a wealth of information about the IT support planned in your enterprise. It is recommended that you familiarize yourself with the functionalities and view options available in business support maps before defining and analyzing your IT support. Whether you are planning the business support in the context of an IT strategy or master plan, the handling of business support matrices is very similar. The following describes the general handling of such matrices.

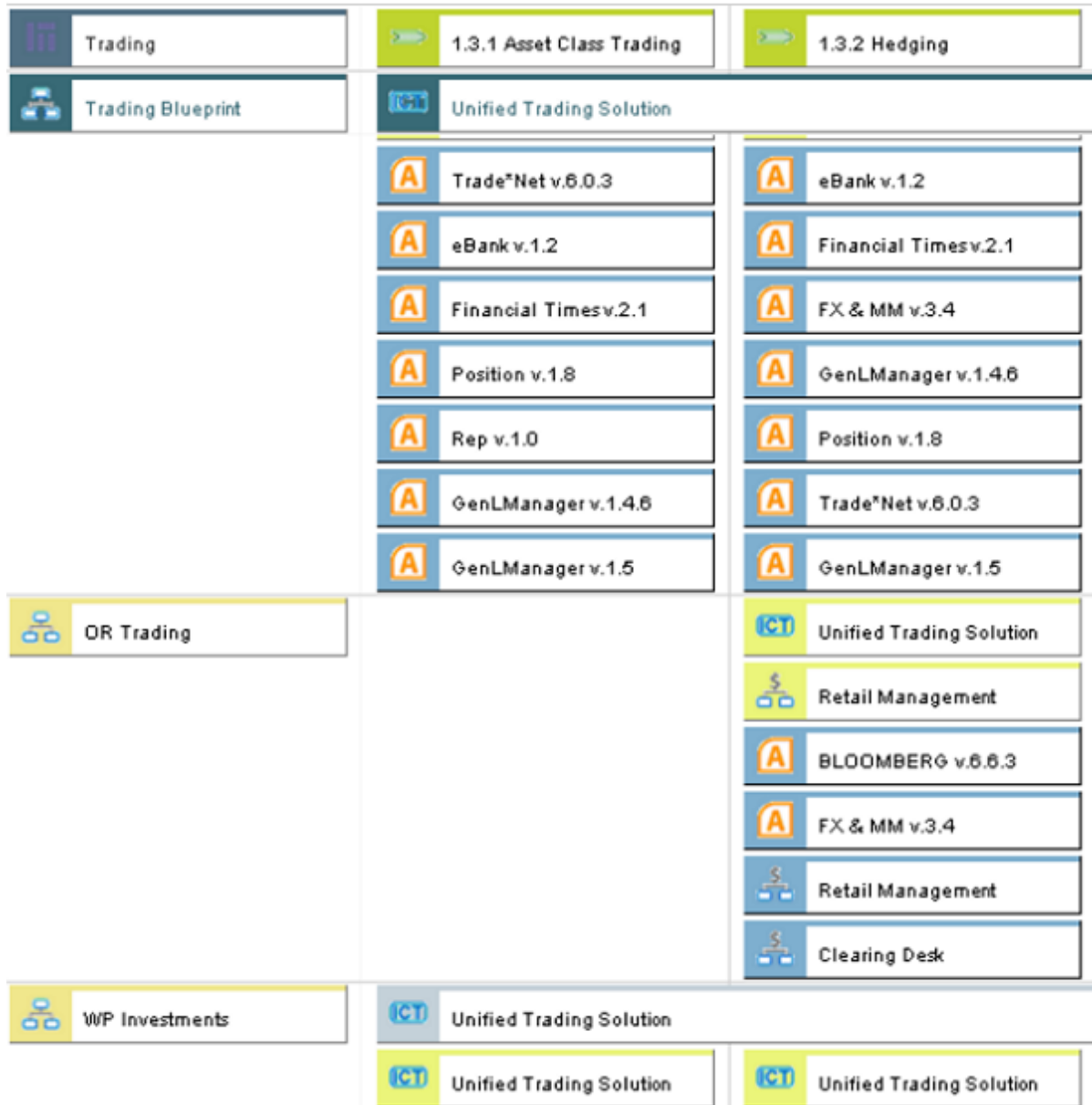


FIGURE: Business support map for a master plan map

For details about the functionalities relevant to the particular planning context, consult the context-sensitive online Help for the page view that you are working with.



The settings controlling the layout and behavior of business support matrices are configured by your solution designer in the XML object **ITMapDef** in the configuration tool Alfabet Expand. The solution designer may configure such aspects as the default object classes to display on the axes, the default order of the axis objects, the permissible object classes for which business supports can be created, the aspect groups and aspect values displayed on matrix objects, and relevance values that allow users to filter information that lacks relevance for their current analysis of the IT landscape. For more information about all configuration possibilities for business matrices, see the section *Configuring Standard Business Support Matrices* in the reference manual *Configuring Alfabet with Alfabet Expand*.



Depending on the specifications of the server hardware and operating system that Alfabet runs on, the size of business support maps may be limited. This is due to a limitation on bit maps that can be rendered on the server. In this case, large datasets may not export correctly.


The following information is available:

- [Quick Start Tips for the Business Support Map](#)
- [Setting Up the X- and Y-Axes of the Business Support Map](#)
- [Implementing Business Process Model Filters in Business Support Maps](#)
- [Communicating about Business Supports via the Notepad Functionality](#)
- [Highlighting Matrix Objects With Color](#)

## Quick Start Tips for the Business Support Map

The following are general tips that will make it easier for you to start working with business support maps as well as handling large business support maps:

- Unless your solution is configured differently, business processes will be displayed on the X-axis and organizations will be displayed on the Y-axis per default. In some cases, you can resort or add/remove objects on the X- and Y-axes. For more information, see the section [Setting Up the X- and Y-Axes of the Business Support Map](#).
- The axis definitions that you specify in the *Business Support Map Page View* for an IT strategy or master plan will be displayed for ALL business support matrices that you access in Alfabet and will also be displayed in the *Business Support Map Report* as well as all other relevant matrix views for the IT strategy, master plan, map view, etc.
- A blueprint is an IT strategy or master plan that provides guidelines about which business support shall be defined. The blueprint may be embedded in the business support map. To display a blueprint, select the blueprint in the **Blueprint** field. For more information about creating a blueprint, see the section [Methodology: Using Blueprints to Plan the To-Be and Target Architectures](#).
- The functionalities available in the *Business Support Map Page View* are oftentimes dependent on the **View Options** settings. For example, the visibility of and ability to create operational and tactical business supports will depend on which options are defined via the **View Options** button in the toolbar. For example, to create an operational business support in a business support map, you must ensure that **Create Operational Business Supports** is specified in the **View Options** editor.
- A business support map with many business processes and organizations can become very unwieldy. Please note that business support maps with more than 1000 business supports will result in a slight compromise in Alfabet performance. If the number of business supports to be displayed exceeds 1000, the user will be informed about the number of business supports displayed and the time required to retrieve and process this information. In order to make the business support map easier to use, a user can do any of the following:
  - Focus on a specific segment in the business support map using the zoom options in the toolbar at the bottom of the matrix.


- Focus on a specific segment in the business support map by shifting the focus of the map. To do so, select a matrix cell and:
  - Click the LEFT ARROW key on the keyboard to expose the leftmost column and shift the vertical focus of the map by one column to the left.
  - Click the RIGHT ARROW key on the keyboard to hide the leftmost column and shift the vertical focus of the map by one column to the right.
  - Click the UP ARROW key on the keyboard to expose the highest row and shift the horizontal focus of the map by one row down.
  - Click the DOWN ARROW key on the keyboard to hide the highest row and shift the horizontal focus of the map by one row up.
- Collapse and hide the filter area to increase the space available for the business support map. To do so, click the **Options**  button in the filter area and select **Hide Filter Panel**.
- Create a more condensed view that displays as little white space as possible across a row. To do so, click the **View Options** button in the toolbar to open the **Business Support Map Report Options** editor. In the **Details** tab, select the option **Condensed Layout**. The alignment of business supports will not be taken into account and the business supports will be ordered in the following sequence: strategic business supports, tactical business supports, and then operational business supports.
- Create a map view to focus on only a section of the business support map with the information relevant for a particular user or issue. A map view can be created in the *Map View Page View* for a master plan map.
- To navigate to the object profile of a business support, either select the object in the matrix and click **Details > Navigate to Business Support** or double-click the business support in the matrix.
- To navigate to the object profile of a business process, organization, or the object providing the business support, select the relevant object on the X- or Y- axes or in the matrix and click **Details > Navigate to Inventory Object**.
- Business supports can be defined in a number of ways:
  - To create a new business support, click the relevant menu ( **Operational BSP**, **Strategic BSP**, **Tactical BSP** ) in the toolbar and select the relevant object class that shall be the provider of the business support. The ability to create operational, strategic, or tactical business supports will depend on the settings defined via the **View Options** editor.
  - To move a business support, drag-and-drop the business support to the relevant cell in the matrix.
  - To copy a business support, click the CTRL key and drag-and-drop the business support to the relevant cell in the matrix.
  - To copy a business support or create new business supports based on a business support, select the business support in the matrix and click **New > Business Support Assistant**. Various options will be displayed that you can select. For example, this option allows you to create a tactical business support based on a strategic business support displayed in the matrix.
  - A **Move/Copy** menu is available in the toolbar that provides a cut, copy and paste option to create business supports in the matrix. To do so, select the business support, click **Cut** or

**Copy** in the **Move/Copy** menu, select the cell where you want to add the business support and click **Paste** in the **Move/Copy** menu. A selected business support may be pasted multiple times.

- Some business supports in the matrix may display custom icons. These have been defined in the relevant object's editor.



Depending on your solution configuration, you may see standard icons or custom icons configured for the objects displayed in the matrix cell. For more information about the configuration of custom icons for objects, see the section *Configuring Class Settings for Object Classes and Object Class Stereotypes* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- Per default, a matrix cell will first display the strategic business supports, secondly the tactical business supports, and thirdly the operational business supports. The business supports will thus be organized cell by cell and row by row, starting in the upper left top corner of the matrix. If the business supports have the same provider but differ, for example, in their operational aspects, they will NOT be displayed aligned on the horizontal axis.
- A legend is available that explains the standard coloring as well as configured color rules of business supports. Click the **Show Legend**  symbol in the toolbar at the bottom of the view in order to open a legend that explains the content of the matrix.
- Standard business support maps and business support map reports can be exported to a number of different file formats such as HTML + PNG, HTML + EMF, HTML + JPEG, HTML + BMP, SVG, PPT, and PDF. For more information about export options, see the section *Exporting Data* in the reference manual *Getting Started with Alfabet*.

## Setting Up the X- and Y-Axes of the Business Support Map

When you first access a business support map, the view may be empty and the functionalities limited. You will first need to define the business processes that are displayed on the X-axis and the organizations that are displayed on the Y-axis.



In some industry segments, it is more relevant to analyze the business support for market products than for organizations. If this is the case, market products may be configured for the Y-dimension of the business support. Furthermore, some enterprises may describe business supports to provide support to domains or business capabilities of the business rather than business processes. If this is the case, domains (business capabilities) may be configured for the X-dimension of the business support. The configuration of the X-dimension and Y-dimension of business supports will apply to operational business supports, solution business supports, strategic business supports, and tactical business supports.

For the sake of simplicity, the documentation will describe business processes on the X-dimension and organizations on the Y-dimension of business supports and business support maps. If your enterprise uses different object classes on the X- and Y-dimensions, please substitute the appropriate object class for the X- and or Y-dimension.


A default configuration will determine which object classes can be displayed on the matrix axes in the *Business Support Map Page View*. Unless your solution is configured differently, business processes are placed per default on the X-axis and organizations are on the Y-axis.



Please note that the axis definitions that you specify in the *Business Support Map Page View* for an IT strategy or master plan will be displayed for ALL business support matrices that you access in Alfabet and will also be displayed in the *Business Support Map Report* as well as all other relevant matrix views for the IT strategy, master plan, map view, etc.

If strategic business supports have already been created for business process and organizations on the X- and Y-axes, these will be automatically added to the *Business Support Map Page View*.

You can do the following to set up the X- and Y-axes of the business support map:

- **Add business processes and organizations to the X- and Y- axes.** If objects are not available on both the X- and Y-axes of the business support map, the toolbar buttons to create business supports will be disabled. There are two ways to add objects to the axes of a business support map.
  - **Add individual objects to the matrix axes.** To do so, click **New > Add Business Process** or **Add Organization**. In the object selector, select the objects you want to add to the respective axis and click the **Add** button. When all relevant objects have been selected, click **OK** to add them to the matrix axis.
  - **Add all objects assigned to the axes of another business support map.** You can add the axes objects specified in the business support map for a selected IT strategy map or master plan map. To do so, click one of the following Select either **IT Strategy Map** or **Master Plan Map** in the **Search For** field in the object selector. Select the relevant IT strategy map or master plan map and click **OK** to add the axis objects to the business support map that you are currently working with.
    - **Add X-Objects from Another Map** to add all X-axis objects from a selected IT strategy map, or
    - **Add Y-Objects from Another Map** to add all Y-axis objects (either organizations or market products) to the Y-axis of the selected map, or
    - **Add X- and Y-Objects from Another Map** to add all objects defined for both axes to the respective axis of the selected map.
- **Remove unwanted business processes and organizations from the X- and Y-axes.** Unwanted objects can be removed from the axis, as needed, by clicking the **Detach**  button. The matrix object as well as its business supports will remain in the Alfabet database.
- **Resequence the order of the business processes and organizations on the X- and Y-axes.** To do so, click **New > Axes Quick Editor**. The **X-Axis** and **Y-Axis** fields list the objects in the sequence that they are currently displayed on the axes in the matrix. To change the sequence of objects on an axis, click an object in the relevant field and click the **Up** button to move it higher in the list or click the **Down** button to move it lower in the list. Repeat for all relevant axis objects in the **X-Axis** pane and in the **Y-Axis** pane.



The sort order of the objects on the axes may be configured by your enterprise. If the sort order has not been configured by your enterprise, you will be able to re-order the objects on the axes via the **Axes Quick Editor**. If the sort order is configured, you will not be able to change the order of the axis objects. In this case, you cannot edit the sequence of axis objects but rather must work with the matrix based on your enterprise's configuration. For more information, see the section *Configuring Standard Business Support Matrices* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- **Change the object classes on the X- and Y-axes.** Although it may not be methodologically meaningful to do so, you can change the default object classes on the matrix axes at any time. Please note however that the axis definitions that you specify in the *Business Support Map Page View* will be displayed for ALL business support matrices that you access in Alfabet and will also be displayed in the *Business Support Map Report* as well as all other relevant matrix views for the master plan, map view, or IT strategy. To change the object class displayed on an axis, click the **View Options** button in the toolbar and select the relevant object class in the **X-Axis** field and **Y-Axis** field.

## Implementing Business Process Model Filters in Business Support Maps

Business process model filters may be specified in order to hide or substitute specific business processes with business process variants in the context of business support maps. If business process model filters have been defined, they will be available for selection in the **Business Process Model Filters** field in the *Business Support Map Report Page View*.


The business process model filter options displayed in the **Business Process Model Filters** field are defined in the *Business Process Model Filters Page View* available in the object profile of the relevant business process model.

## Communicating about Business Supports via the Notepad Functionality

You may create notes about a specific business support that is displayed in the business support map via a notepad functionality. The notepad capability facilitates free-form communication that is relevant for the business support map by allowing you to document additional information in the matrix cell representing a business support. For example, you could create a note that provides additional information about a business support displayed in the matrix or you could create a note in a matrix cell for which no business support is defined in order to indicate that a particular business support is needed for the corresponding business process and organization. The note is thus created directly in the matrix cell corresponding to the business process and organization that require the business support.


Notes can be created in the *Business Support Map Page View* of an IT strategy map, master plan map, and map view. Any user who has Read permissions for a business support map may create and view notes even though that user may not have ReadWrite permissions for the business support map. If the notepad capability is enabled, users can also create notes in the *Business Support Map Report*. However, the notes will only be displayed in the *Business Support Map Page View*.



The notepad capability will only be available if it is activated. To do so, click **View Options**, go to the **Details** tab, and select the **Show Notepad** checkbox and click **OK**. All existing notepad entries will be displayed in their respective matrix cells and the  button to create a note will be displayed in the toolbar. To hide the notes, clear the **Show Notepad** option and click **OK**.

An email notification may be sent to the authorized user responsible for the selected business support map informing him/her whenever a note is created for the business support map. The text displayed in the automatically-generated email notification is configured in the `ITMap-NoteCreated` text template in the configuration tool Alfabet Expand. For more information, see

the section *Configuring Text Templates for Email Notifications* in the reference manual *Configuring Alfabet with Alfabet Expand*.

- To create a notepad entry, select the relevant matrix cell and click the  button to create the note. In the editor that opens, define the following as needed and click **OK** to save the note.
  - Notepad For:** Displays the name of the map as well as the business process and organization that the selected cell corresponds to.
  - Notes History:** Displays a history of the exchange of notes. The syntax contains Date, Timestamp, User Name (name of the user writing a note), followed by the note text.
  - Note Info:** Displays notepad information including the timestamp and name of the user who created the notes.
  - Note Text:** Enter text for the note you want to create for the selected cell.
  - Notify IT Strategy/Master Plan Map Responsible:** Select this checkbox if you want an automatic email sent to the authorized user who is responsible for the business support map.

The most recent note will be displayed directly in the matrix cell.

After a note in the business support map has been reviewed and any necessary action taken, you can remove the note from the cell by selecting it and clicking **New > Clear Notepad Cell**. The note will be removed from the matrix cell.

## Highlighting Matrix Objects With Color

There are several methods to highlight matrix objects displayed in business support maps with color. You can either display the results found by configured color rules or you can assign colors to individual business supports. Assigned colors as well as the colors applied by color rules can be removed from the matrix and hidden. The following is possible:

- Specify color rules to cluster and highlight a specific set of objects in the business support map for a map view. Color rules are based on one or more queries that are configured to color a found set of objects. If the color rule functionality is activated for a map view, all activated color rules will be executed and the matrix cells will be colored accordingly. To implement color rules:
  - Color rules must first be configured in the **Color Rules** view available on the root node of the *Master Plans Explorer*. For more information about configuring color rules, see the chapter *Configuring Color Rules for Map Views and Diagram Views* in the reference manual *Configuring Evaluation and Reference Data in Alfabet*.
  - In the **Map View** editor, select a color rule group or individual color rules in the **Color Rules** tab.
  - Once a color rule is defined, it must be activated in order for the Alfabet query to be executed. The query should be re-activated periodically in order to update the query results and include changes made to the Alfabet database. The color rule may be manually activated in the **Color Rules** view or activated via a batch process. For more information about activation via a batch process, see the section *Batch Evaluation of Color Rules with RescanColorRules.exe* in the reference manual *System Administration*.

- Execute the color rules in the business support map. To do so, click **View Options**, go to the **Details** tab, and select the **Use Color Map** checkbox and click **OK**. All matrix objects associated with objects found by an Alfabet query specified for the color rule will be displayed with the specified color. The color rules will be automatically added to the legend of the views. If necessary, the color applied to individual tactical business supports or strategic business supports can be hidden.



You must ensure that the settings for the matrix are meaningfully defined to display the results of the color rules in the view. For example, if the query associated with the color rule is specified to find tactical business supports, then you must ensure that the option **Show Tactical Business Support** is selected in the **Objects** tab in the **Business Support Map Options** editor.

- A specific color can be assigned to a selected tactical business support or operational business supports displayed in in the *Business Support Map Page View* in order to highlight them in a way that is relevant to users working with the matrix. To implement a specific color definition for individual tactical business supports or operational business supports:
  - Define the color for the individual business supports in the *Business Support Map Page View* for a master plan map
    - Click **Analyze > Map Objects Report**.
    - In the **Map Objects** view, select the relevant business support(s) in the **Tactical Business Support** section or **Operational Business Support** section of the view.
    - Click **Action > Assign Color**.
    - In the **Color Editor**, enter a name for the color assignment in the **Name** field. Click the **Color** symbol, select a color in the **Color** editor and click **OK**. The color rule is applied to the selected objects in the **Map Objects** view as well as in the matrix views.
  - Execute the color definition in the business support map. To do so, click **View Options**, go to the **Details** tab, and select the **Use Color Map** checkbox and click **OK**. All business supports will be displayed with the specified color.
  - The color can be hidden by clicking **Analyze > Map Objects Report**, selecting the relevant business support and clicking **Action > Clear Color**. The color will be removed from the selected object in the **Map Objects** view as well as in the business support map.