Itana Face2Face 2015

EDUCAUSE Annual Conference

Preconference Seminar 06F

Meeting Room 134-135, 8AM to 4PM

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Facilitators

Jim Phelps

University of Washington

Chair, Itana

Director, Workday HR/P Implementation Project

Director of Enterprise Architecture & Strategy

Chris Eagle

University of Michigan

Vice Chair & CG Leader, Itana

Enterprise Architect

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Agenda - Morning

Time	Section
8:00-9:00 AM	Intro and Warm Up
9:00 - 9:15	Kick off Table Discussion
9:15 - 9:30	Interactive Case Study - Strategy On A Page
BREAK	
10:00-11:00	Panel Discussion
11:00 - 11:30	Table discussions - Take-Aways (W3)
11:30 am-12:30 pm	Lunch

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Agenda - Afternoon

Time	Section
11:30 AM	Lunch
12:30-12:45	Gather - Take-Aways from the morning +, Δ, !, ?
12:45 - 2:00	Shift and share case studies, report out
Break	
2:30 - 3:15	1, 2, 4 All on Min Specs
3:15 - 3:45	Curriculum Planning and Assessment
3:45-4:00 pm	Wrap-Up +, Δ, !, ?

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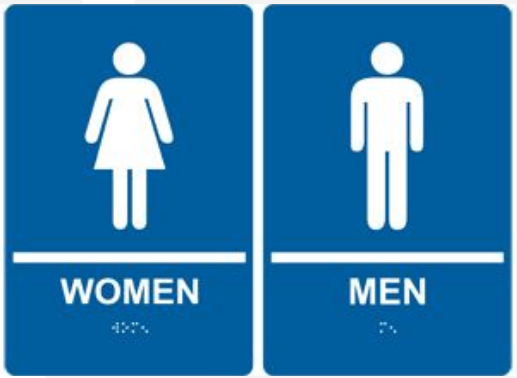

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Two Themes for today

Signature Ready Enterprise Architecture	**Facilitation**

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+	What went well? What did enjoy?
Δ	What would you like to have done differently? What would you change?
!	What big ideas hit you? What will you take back?
?	What questions do you still have? What would you like to find an answer for?

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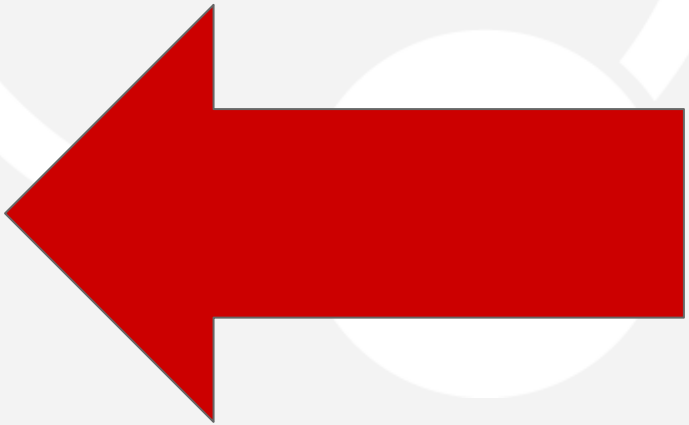
Count Off - 1, 2, 3, 4

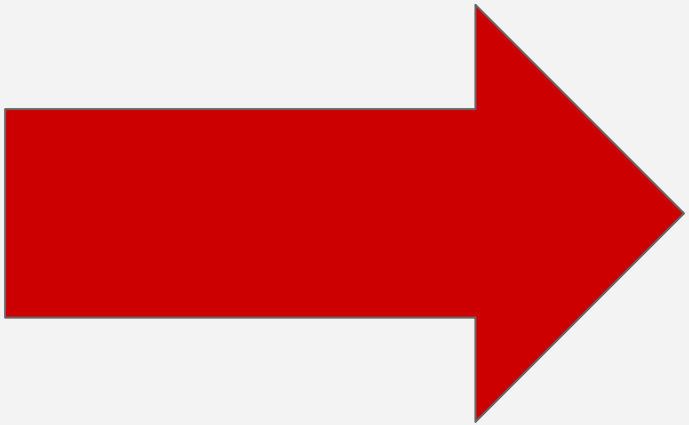
1 & 2

line up together



3 & 4

line up together



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"W3"	Liberating Structures http://www.liberatingstructures.com/
What?	What happened? What did you learn?
So What?	Why was it important?
Now What?	What are you going to do with what you learned/happened?

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Lt. Col. Iceal “Gene” Hambleton

Futility Closet Podcast: Episode 66 - 18 Holes in Vietnam

Wikipedia Article: Rescue of Bat 21 Bravo

LA Times Obituary: 'Gene' Hambleton, 85; His Rescue Depicted in 'Bat-21' Books, Film

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Table Discussion

Topic:

What does signature ready Architecture mean to you?

(What)

Why is it important? How is it different than past EA activities?

(So,What)

Technique:

1, 2, 4, All

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Strategy On A Page

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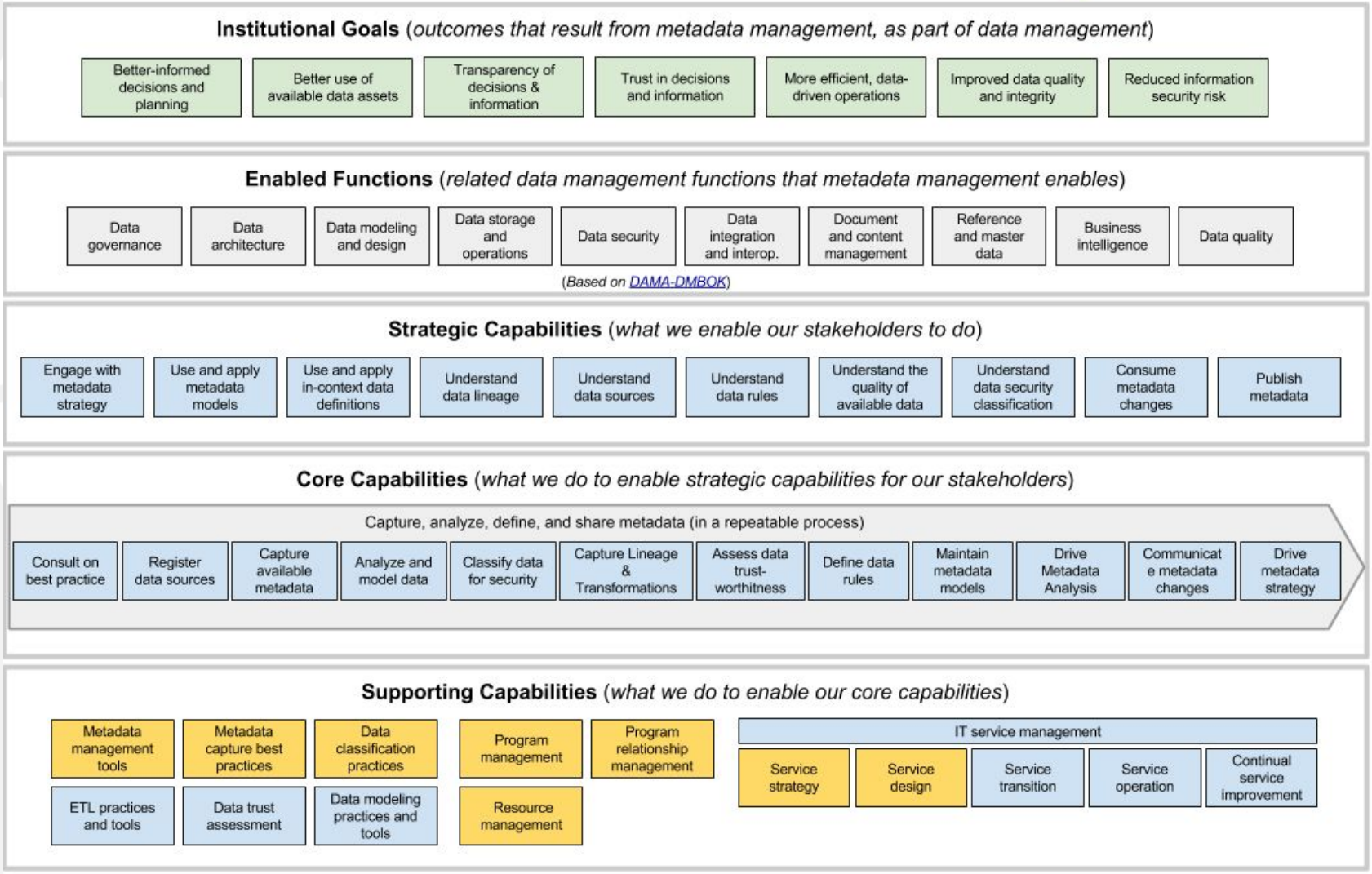
Institutional Goals (outcomes that result from metadata management, as part of data management)
Better-informed decisions and planning
Better use of available data assets
Transparency of decisions & information
Trust in decisions and information
More efficient, data-driven operations
Improved data quality and integrity
Reduced information security risk
Enabled Functions (related data management functions that metadata management enables)
Data governance
Data architecture
Data modeling and design
Data storage and operations
Data security
Data integration and interop.
Document and content management
Reference and master data
Business intelligence
Data quality
(Based on DAMA-DMBOK)
Strategic Capabilities (what we enable our stakeholders to do)
Engage with metadata strategy
Use and apply metadata models
Use and apply in-context data definitions
Understand data lineage
Understand data sources
Understand data rules
Understand the quality of available data
Understand data security classification
Consume metadata changes
Publish metadata
Core Capabilities (what we do to enable strategic capabilities for our stakeholders)
Capture, analyze, define, and share metadata (in a repeatable process)
Consult on best practice
Register data sources
Capture available metadata
Analyze and model data
Classify data for security
Capture Lineage & Transformations
Assess data trust-worthitness
Define data rules
Maintain metadata models
Drive Metadata Analysis
Communicat e metadata changes
Drive metadata strategy
Supporting Capabilities (what we do to enable our core capabilities)
Metadata management tools
Metadata capture best practices
Data classification practices
Program management
Program relationship management
ETL practices and tools
Data trust assessment
Data modeling practices and tools
Resource management
IT service management
Service strategy
Service design
Service transition
Service operation
Continual service improvement

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Institutional Goals (*outcomes that result from metadata management, as part of data management*)

- Better-informed decisions and planning
- Better use of available data assets
- Transparency of decisions & information
- Trust in decisions and information
- More efficient, data-driven operations
- Improved data quality and integrity
- Reduced information security risk

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Enabled Functions (*related data management functions that metadata management enables*)

Data governance	Data architecture	Data modeling and design	Data storage and operations	Data security
Data integration and interop.	Document and content management	Reference and master data	Business intelligence	Data quality

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Strategic Capabilities (*what we enable our stakeholders to do*)

Engage with metadata strategy	Use and apply metadata models	Use and apply in-context data definitions	Understand data lineage	Understand data sources
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Core Capabilities (*what we do to enable strategic capabilities for our stakeholders*)

Capture, analyze, define, and share metadata (in a repeatable process)

Consult on best practice	Register data sources	Capture available metadata	Analyze and model data	Classify data for security	Capture Lineage & Transformations
Assess data trust-worthiness	Define data rules	Maintain metadata models	Drive Metadata Analysis	Communicate metadata changes	Drive metadata strategy

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Supporting Capabilities (*what we do to enable our core capabilities*)

Metadata management tools	Metadata capture best practices	Data classification practices	Program management	Program relationship management
ETL practices and tools	Data trust assessment	Data modeling practices and tools	Resource management	

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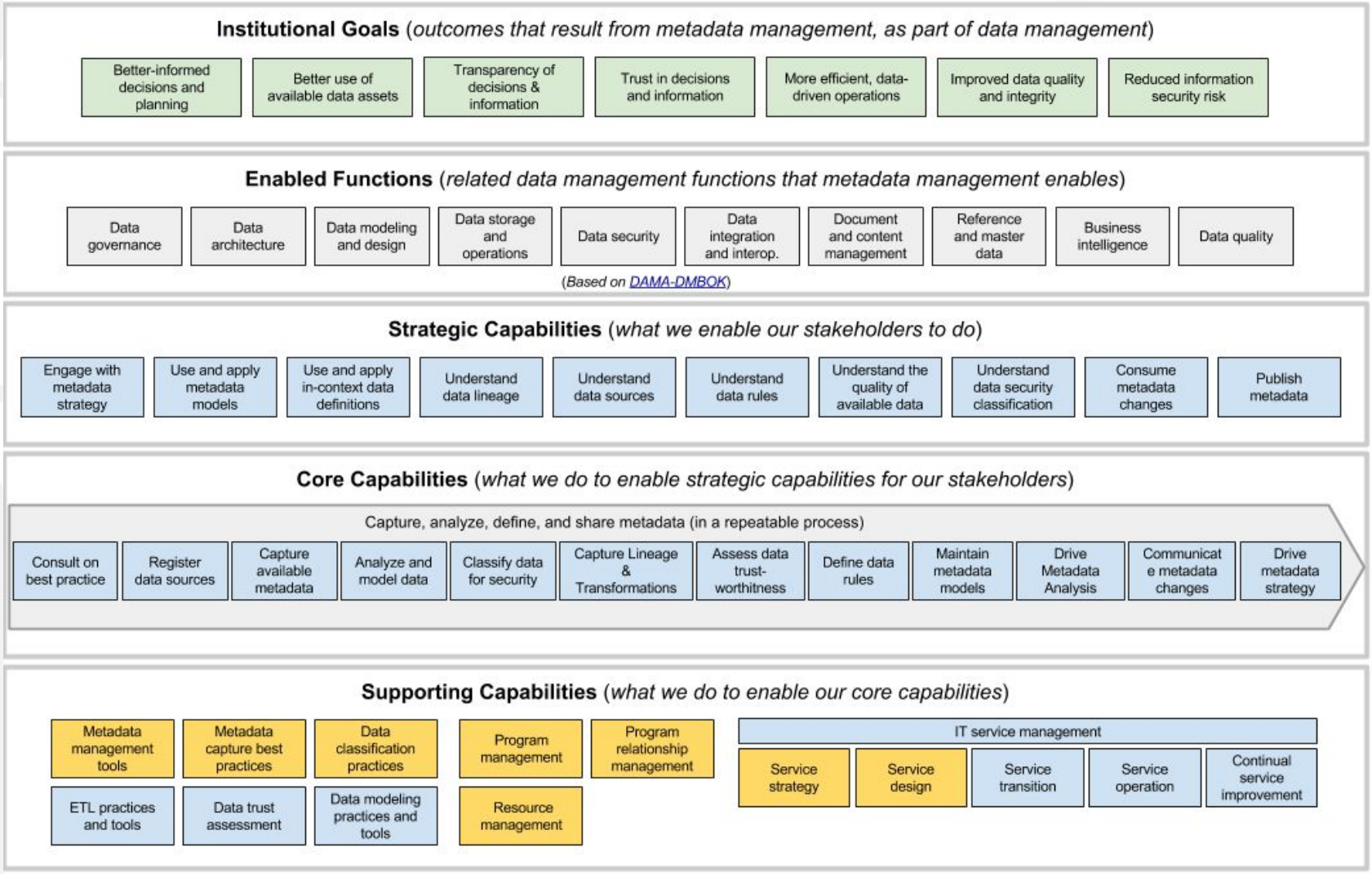
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Table Discussion - 1, 2, 4, All

Topic:

What does “signature ready” mean in context of a Capability Map if anything?

What are you getting agreement to?

Who would be agreeing?

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How do you make that agreement richer?

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Core Capabilities (*what we do to enable strategic capabilities for our stakeholders*)

Capture, analyze, define, and share metadata (in a repeatable process)

Consult on best practice	Register data sources	Capture available metadata	Analyze and model data	Classify data for security	Capture Lineage & Transformations
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Supporting Capabilities (*what we do to enable our core capabilities*)

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Business Outcomes

Data custodians

- create access policies once and they are enforced everywhere.
- can easily update and review their metadata for their core data.
- can easily understand where their data is exposed and the security models for the data.

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Business Outcomes

Data custodians

- create access and policies once and they are enforced everywhere.
- can easily update and review their metadata for their core data.
- can easily understand where their data is exposed and the security models for the data.

Consumers

- can easily discover how and where they can access / consume core enterprise data.
- know how to get training and help with metadata best practices.
- trust and understand the lineage and quality of data in various sources.

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Business Outcomes

Data custodians

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Consumers

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Data Quality

- Distributed groups are practicing Metadata Management in a common way in a common repository.
- Core enterprise data is consistent across various access methods and views.

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How does this make the agreement richer?

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Success Measures

Deploy a Metadata Repository for core HR/P data with 80% of definitions complete.

Training completed for 50% of key customers.

Top business customers come to the repository for their metadata needs.

Definition, analysis of the impact and roadmap for the Semantic DAC.

Clearly defined and designed Metadata data management service(s).

Assessment against a maturity model showing improvement.

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And this?

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Initiatives

Metadata Knowledge Navigator

Megatron - EIP Transform Engine

Metadata Training/Communication

Uniform Security Management: Semantic DAC

Expanding DAC/SMAT to cover API access

Rationalize Metadata Repositories

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And this?

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The Result - Metadata Strategy On a Page

Note: You can find this document on the Itana Wiki too.

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Metadata Strategy

Business Outcomes

Data custodians
- create access and policies once and they are enforced everywhere.
- can easily update and review their metadata for their core data.
- can easily understand where their data is exposed and the security models for the data.

Consumers
- can easily discover how and where they can access / consume core enterprise data.
- know how to get training and help with metadata best practices.
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Data Quality
Distributed groups are practicing Metadata Management in a common way in a common repository.

Core enterprise data is consistent across various access methods and views.

Core Capabilities

Consult on best practice	Register data sources	Analyze and model data	Capture Lineage & Transformations	Assess data trust-worthiness	Maintain metadata models
Capture available metadata	Classify data for security	Define data rules	Drive Metadata Analysis	Communicate metadata changes	Drive metadata strategy

Supporting Capabilities

Metadata management tools	Metadata capture best practices	Data classification practices	Program management	Communication and Outreach
ETL practices and tools	Data trust assessment	Data modeling practices and tools	Resource management	
Service strategy	Service design	Service transition	Service operation	Continual service improvement

Management Questions

Is Metadata Management an initiative? No. It is a program that needs to mature over time.
Is the HR/P Metadata effort the complete program? No. It is a start and first edge for a broader practice.
Will this be important for Finance and other initiatives? Yes. It is a foundational practice.

Core Focus FY16 | Focus for FY16

Success Measures

Deploy a Metadata Repository for core HR/P data with 80% of definitions complete.

Training completed for X customers.

X% of business customers come to the repository for their metadata needs.

Definition, analysis of the impact and roadmap for the Semantic DAC.

Clearly defined and designed Metadata data management service(s).

Assessment against a maturity model showing improvement.

Initiatives

Metadata Knowledge Navigator

Megatron - EIP Transform Engine

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How does this make the agreement richer?

What else would you do?

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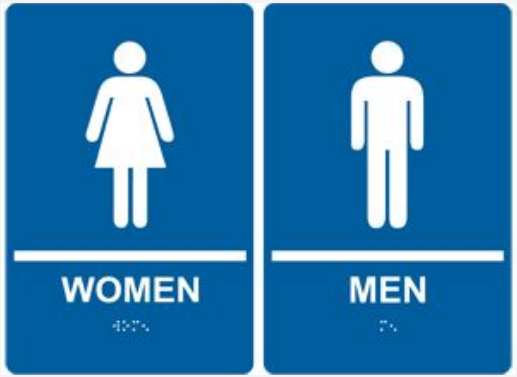

Hoosier Lobby, Second Level

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Panel

William Allison

Dir. of Architecture Platforms and Integration

UC Berkeley

Susan Kelly

CTO

Yale University

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"W3"	Liberating Structures http://www.liberatingstructures.com/
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11:30 am-12:30 pm	Lunch

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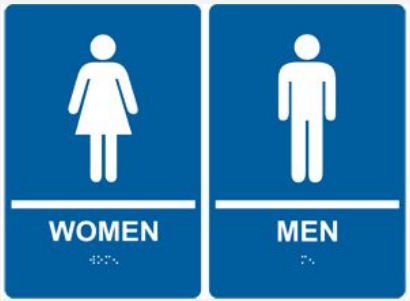
Lunch till 12:30



500 Balroom

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Agenda - Afternoon

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11:30 AM	Lunch
12:30-12:45	Improve - Yes, And...
12:45 - 2:00	Shift and share case studies, report out
Break	
2:30 - 3:15	Curriculum Planning and Assessment
3:15 - 3:45	1, 2, 4 All on Min Specs
3:45-4:00 pm	Wrap-Up +, Δ, !, ?

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Improve! Yes, and...

One thing (lesson, idea, etc) I’m taking home is...

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Shift And Share

Case Studies

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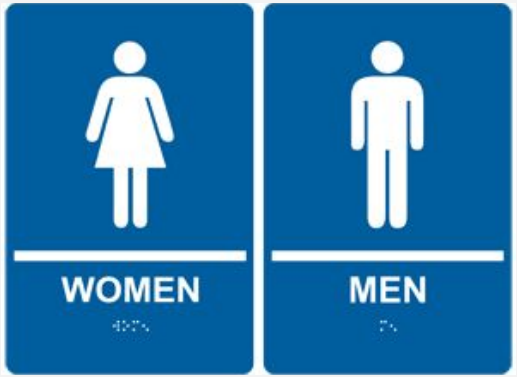

Hoosier Lobby, Second Level

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CEB Best Practice

BUSINESS-ALIGNED ARCHITECTURE OPTION ANALYSIS

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Indicator	Goal	Value	Gap to Goal	Status
1. Functionality	3.0	3.2	0.2	
2. User Experience	5.0	2.2	(2.8)	
3. Solution Infrastructure	4.0	2.9	(1.1)	
4. On-Network Experience	4.0	3.3	(0.7)	
5. Complexity	3.0	1.8	(2.0)	
6. Software and Data Integration	3.0	2.5	(0.5)	
7. Security	3.0	1.6	(1.4)	
8. Operability	3.0	1.7	(1.3)	
9. Maintainability	4.0	1.8	(2.2)	
10. Capacity Management	3.0	2.8	(0.2)	
11. Fault Tolerance	3.0	2.6	(0.4)	
12. IT Portfolio	3.0	3.0	0.0	

At or Above Goal

Within 2 Points of Goal

2+ Points from Goal

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VISUALIZE BUSINESS OUTCOME TRADE-OFFS OF ARCHITECTURE CHOICES

PROGRESSIVE

Architecture Valuation Framework

Illustrative—Sales Collaboration Solution

Source: Progressive; CEB analysis.

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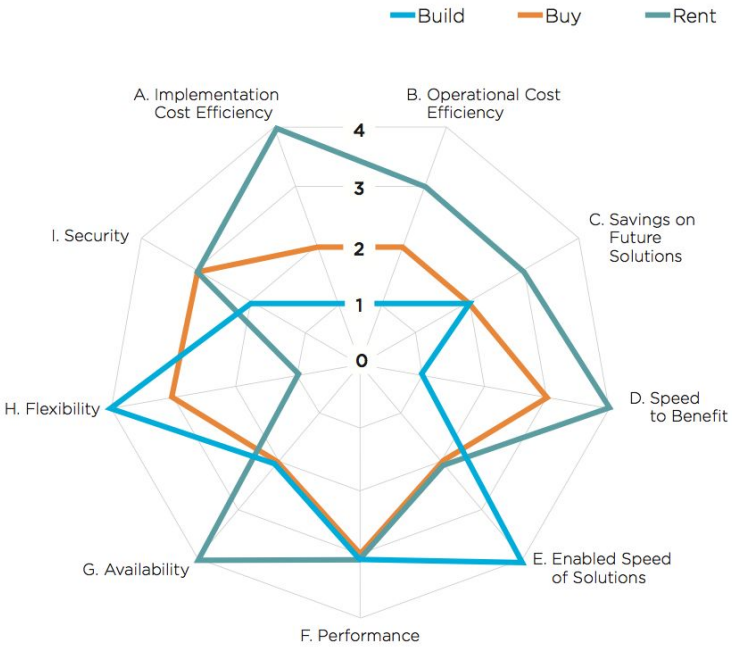
NUDGE STAKEHOLDER DECISIONS

PROGRESSIVE

Guiding Principles for Framing Architecture Choices

Illustrative Scenario

1. Offer Choices Within Guardrails
Frame options within the realm of acceptable EA and security outcomes, but make cost/speed/architecture quality trade-offs explicit.



3. Anchoring
Choose which alternatives to present to provide useful context and help shape trade-off decisions.

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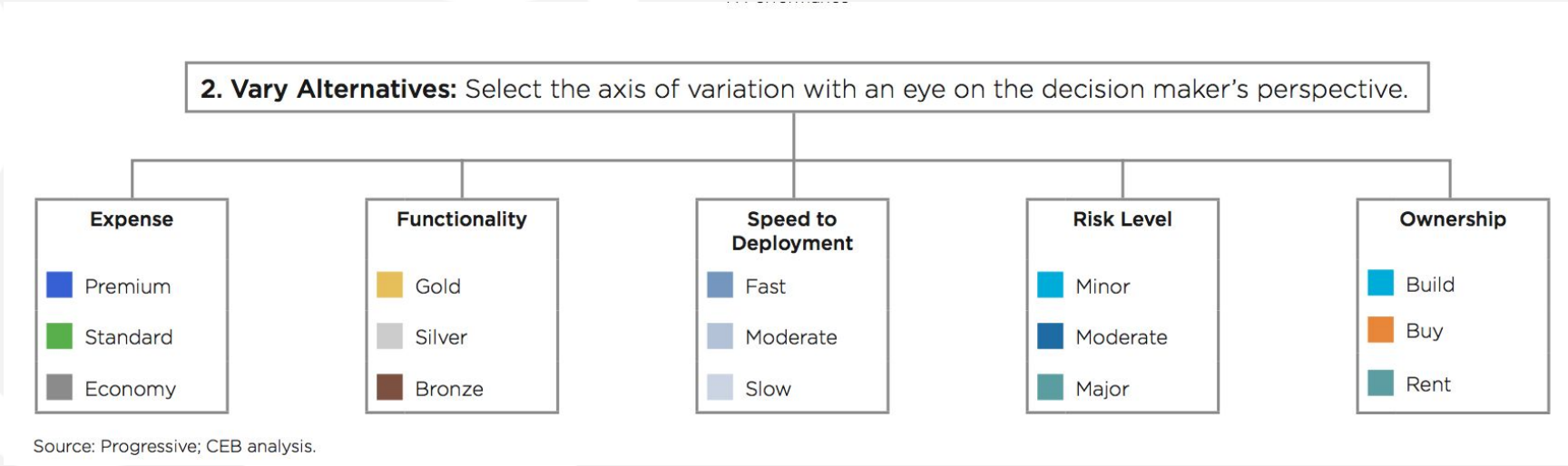

Source: Progressive; CEB analysis.

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		Build	Buy	Rent
Cost	Implementation Cost Efficiency	1	2	4
	Operational Cost Efficiency	1	2	3
	Savings on Future Solutions	2	2	3
Business Agility	Speed to Benefit	1	3	4
	Enabled Speed of Solutions	4	2	2
Architecture Quality	Performance	3	3	3
	Availability	2	2	4
	Flexibility	4	3	1
	Security	2	3	3

Prepared by: Nolan Thomas
Last Updated: 11 July 20XX

Notes:
Architecture considered:

1. (Description of Build Scenario)
2. (Description of Buy Scenario)
3. (Description of Rent Scenario)

It is my recommendation that Rent is chosen.

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Curriculum Management

Roll your own Case Study

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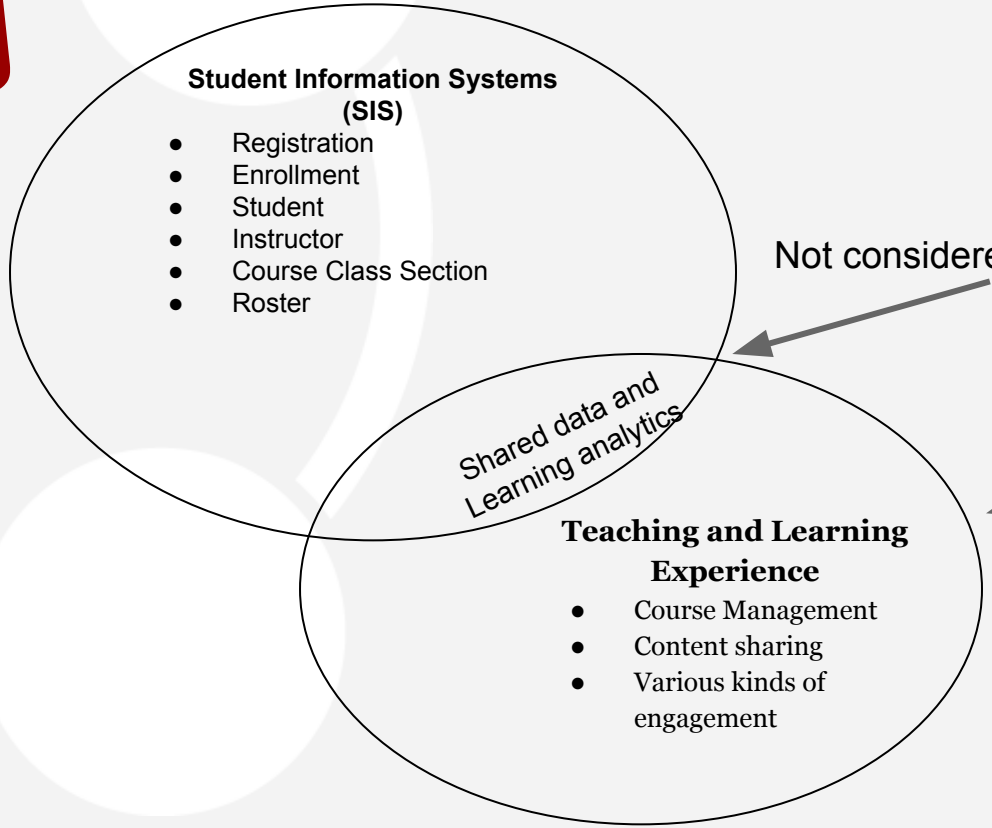
Today



Not considered “overlap”

Not Coordinated Across the University

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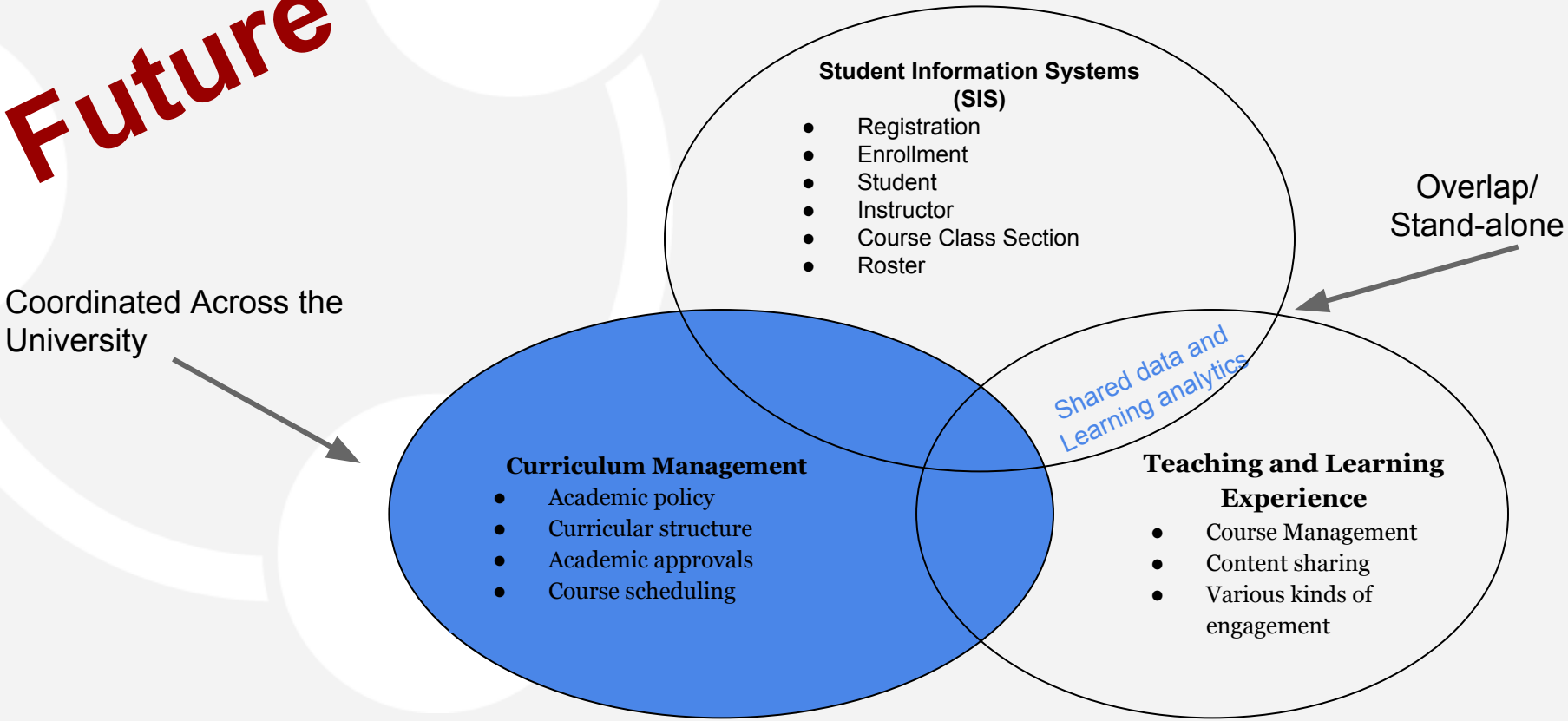
Future



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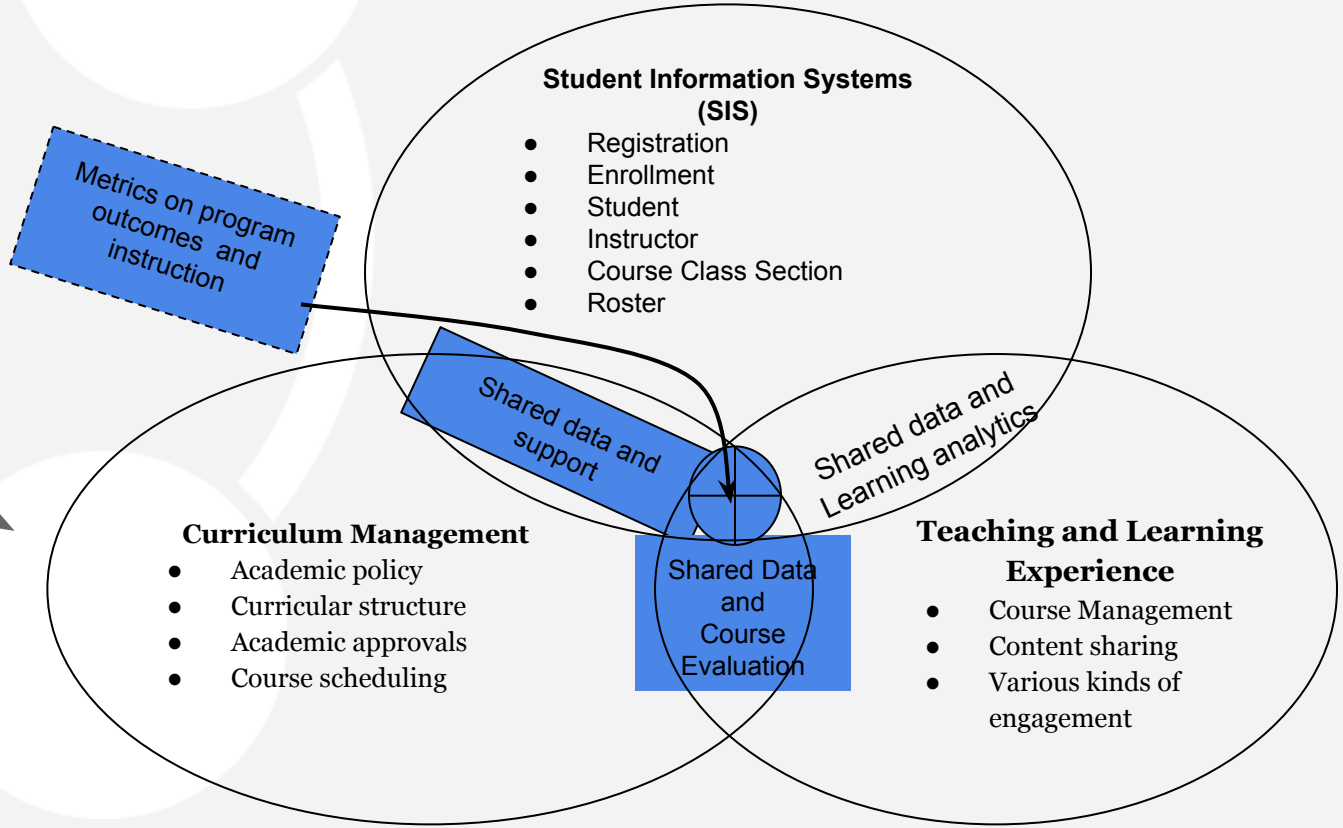
Future

Coordinated Across the University



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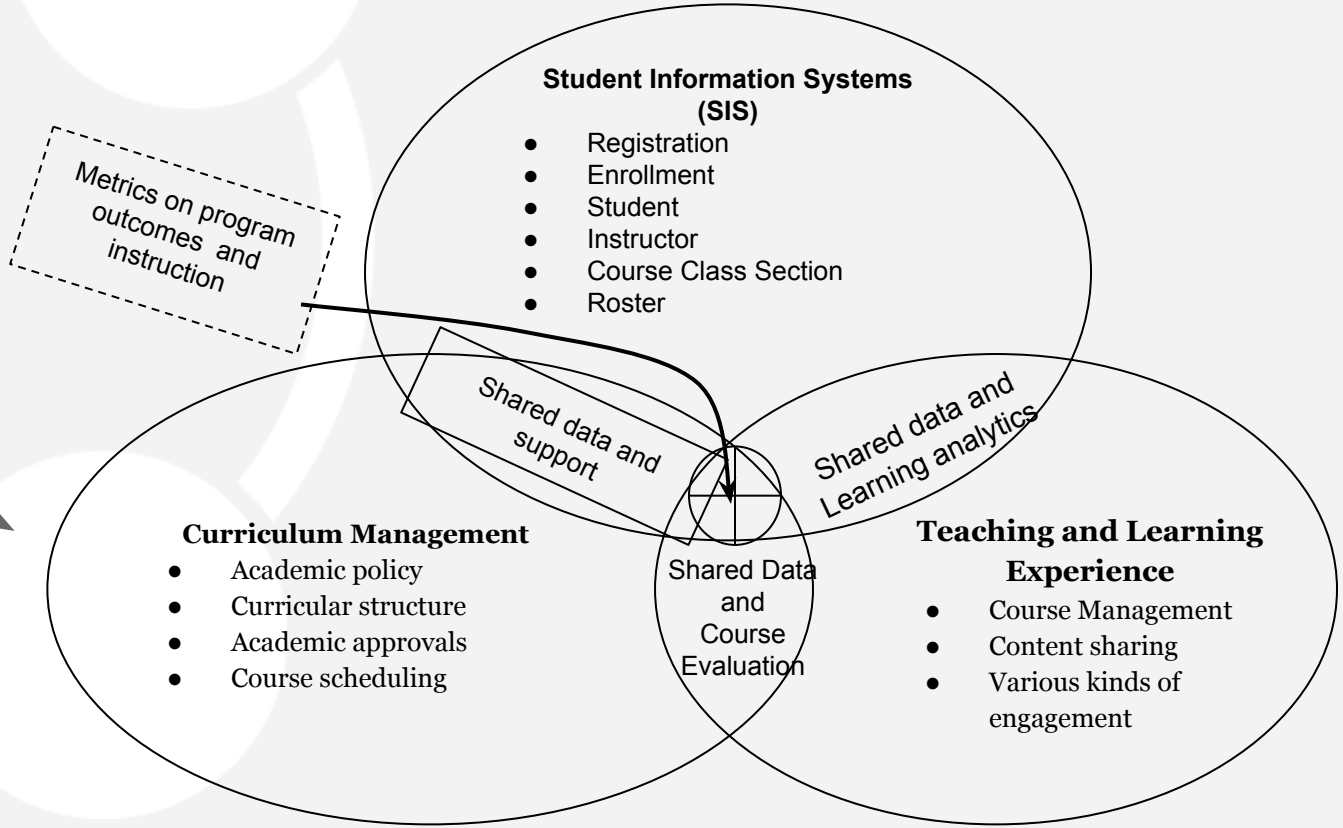

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Non-Functional Requirement

Must be flexible to major changes in environment

- Non-credit classes
- Outcome-based learning
- Shifting Transcripts
- Things we don’t know about yet

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Roll your own case study

What would you want to get agreement on?

Who would you need to get agreement from?

How would you get agreement?

- What artifacts would you create?
- How would you make them Signature Ready?

How would you facilitate this discussion?

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Table Discussion

Topic:

What does Signature Ready Architecture mean to you?

(What)

Why is it important? How is different about it vs. past EA activities? (So, What)

Technique:

1, 2, 4, All

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Table Work - Minimum Specs

1. **Brainstorm - maximum specs.** What are all the things that make something Signature Ready
2. **Reduce -** discuss and eliminate everything that **is NOT required**
3. **Capture - Minimum Specs**

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+	What went well? What did enjoy?
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Itana a peer group for Enterprise, Business and Technical Architects in higher education.

Itana is co-supported by EDUCAUSE and Internet2. To learn more about Itana, go to Itana.org.

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