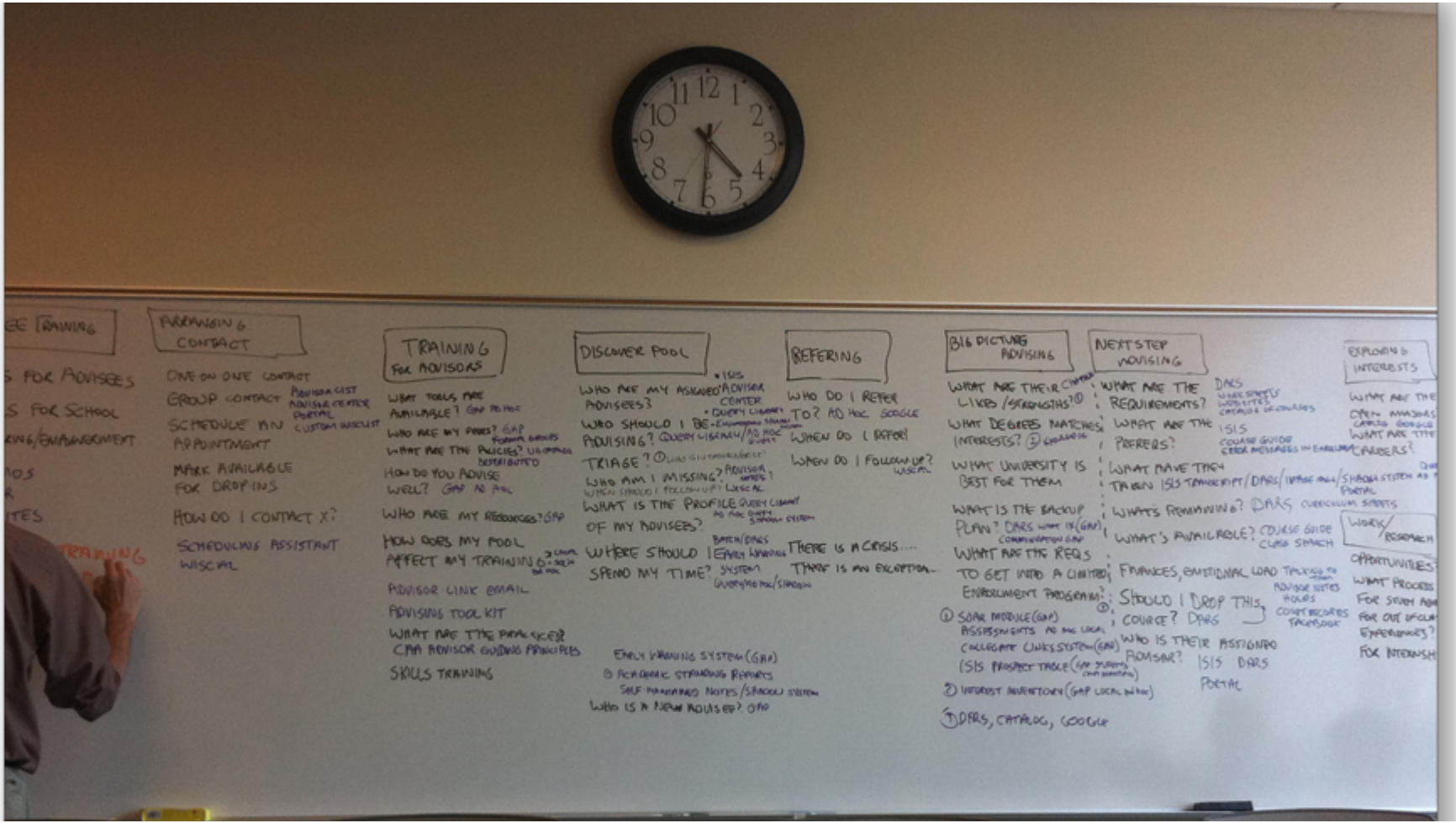
EA for SMB

Jim Phelps
Director of Enterprise Architecture & Strategy

Undergraduate Advising @Madison



EE TRAINING

S FOR ADVISEES

S FOR SCHOOL

RING/ENGAGEMENT

TES

TRAINING

PREMAJOR CONTACT

ONE ON ONE CONTACT

GROUP CONTACT

SCHEDULE MIN APPOINTMENT

MARK AVAILABLE FOR DROP INS

HOW DO I CONTACT X?

SCHEDULING ASSISTANT WISCAL

TRAINING FOR ADVISORS

WHAT TOOLS ARE AVAILABLE?

WHO ARE MY PEERS?

WHAT ARE THE POLICIES?

HOW DO YOU ADVISE WELL?

WHO ARE MY RESOURCES?

HOW DOES MY POOL AFFECT MY TRAINING?

ADVISOR LINK EMAIL

ADVISING TOOL KIT

WHAT ARE THE PRACTICES? CAA ADVISOR GUIDING PRINCIPLES

SKILLS TRAINING

DISCOVER POOL

WHO ARE MY ASSIGNED ADVISEES?

WHO SHOULD I BE ADVISING?

TRIAGE?

WHO AM I MISSING?

WHAT IS THE PROFILE OF MY ADVISEES?

WHERE SHOULD I SPEND MY TIME?

EARLY WARNING SYSTEM (GAP)

ACADEMIC STANDING REPORTS

SELF MAINTAINED NOTES/SPREADSHEET SYSTEM

WHO IS A NEW ADVISEE? GAP

REFERING

WHO DO I REFER TO?

WHEN DO I REFER?

WHEN DO I FOLLOW UP?

THERE IS A CRISIS....

THERE IS AN EXCEPTION...

BIG PICTURE ADVISING

WHAT ARE THEIR LIKES/STRENGTHS?

WHAT DEGREES MATCHES INTERESTS?

WHAT UNIVERSITY IS BEST FOR THEM

WHAT IS THE BACKUP PLAN?

WHAT ARE THE REQS TO GET INTO A LIMITED ENROLLMENT PROGRAM?

① SOAR MODULE (GAP) ASSESSMENTS AT MC LOCAL

COLLEGIATE LINK SYSTEM (GAP)

ISIS PROSPECT TRACK (GAP)

② INTEREST INVENTORY (GAP LOCAL MAC)

③ DARS, CATALOG, GOOGLE

NEXT STEP ADVISING

WHAT ARE THE REQUIREMENTS?

WHAT ARE THE PREREQS?

WHAT HAVE THEY TAKEN

WHAT'S REMAINING?

WHAT'S AVAILABLE?

FINANCES, EMOTIONAL LOAD

SHOULD I DROP THIS COURSE?

WHO IS THEIR ASSIGNED ADVISOR?

ISIS DARS PORTAL

EXPLORING INTERESTS

WHAT ARE THE

CAREERS?

WORK/RESEARCH

OPPORTUNITIES

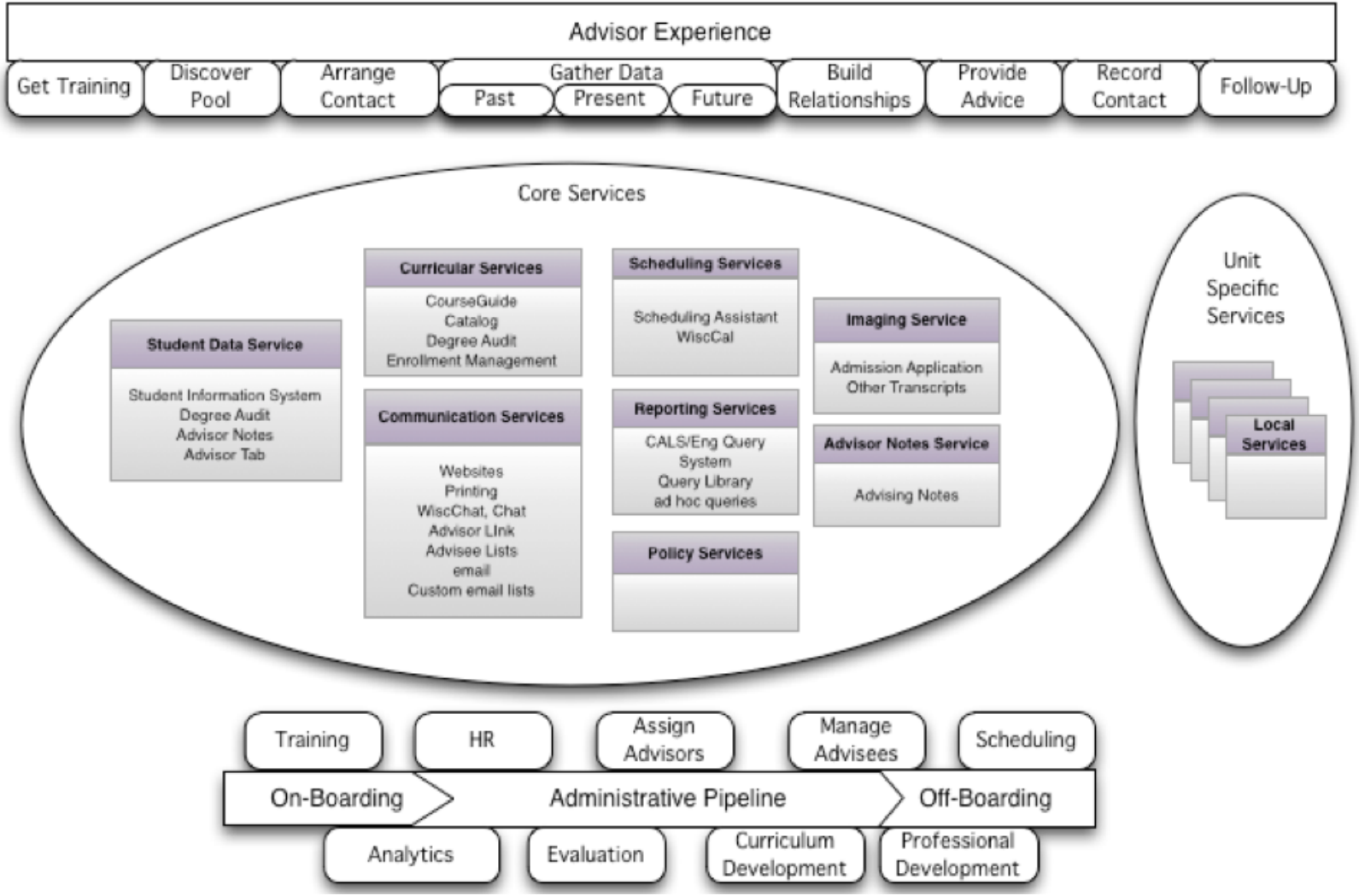
WHAT PROCESS

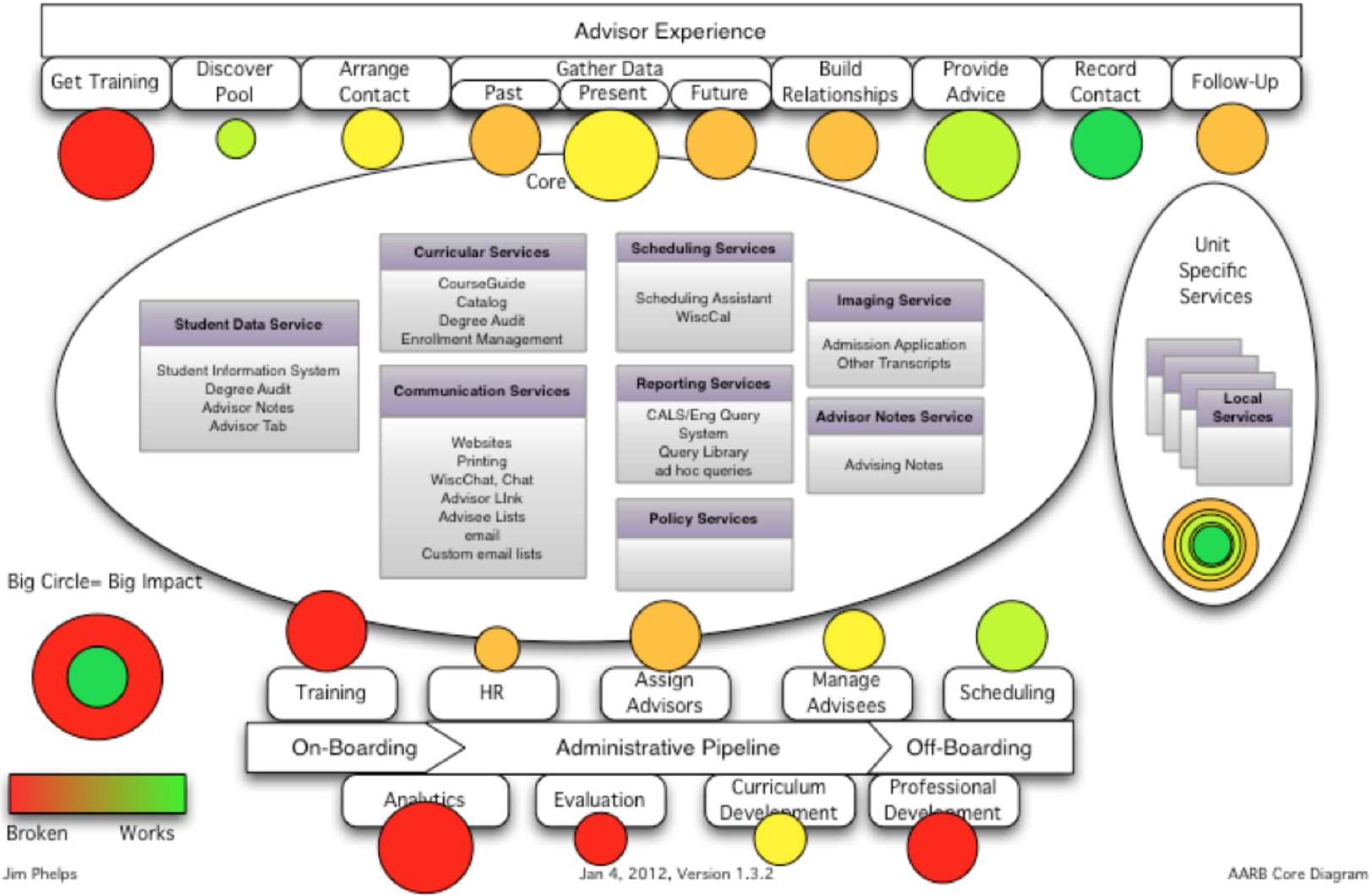
FOR STUDY ABR

FOR OUT OF CLA

EXPERIENCES?

FOR INTERNSH


Advisor Experience
Get Training
Discover Pool
Arrange Contact
Gather Data
Past
Present
Future
Build Relationships
Provide Advice
Record Contact
Follow-Up
Core Services
Student Data Service
Student Information System
Degree Audit
Advisor Notes
Advisor Tab
Curricular Services
CourseGuide
Catalog
Degree Audit
Enrollment Management
Communication Services
Websites
Printing
WiscChat, Chat
Advisor LInk
Advisee Lists
email
Custom email lists
Scheduling Services
Scheduling Assistant
WiscCal
Reporting Services
CALS/Eng Query System
Query Library
ad hoc queries
Policy Services
Imaging Service
Admission Application
Other Transcripts
Advisor Notes Service
Advising Notes
Unit Specific Services
Local Services
Training
HR
Assign Advisors
Manage Advisees
Scheduling
On-Boarding
Administrative Pipeline
Off-Boarding
Analytics
Evaluation
Curriculum Development
Professional Development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Curricular Services
CourseGuide
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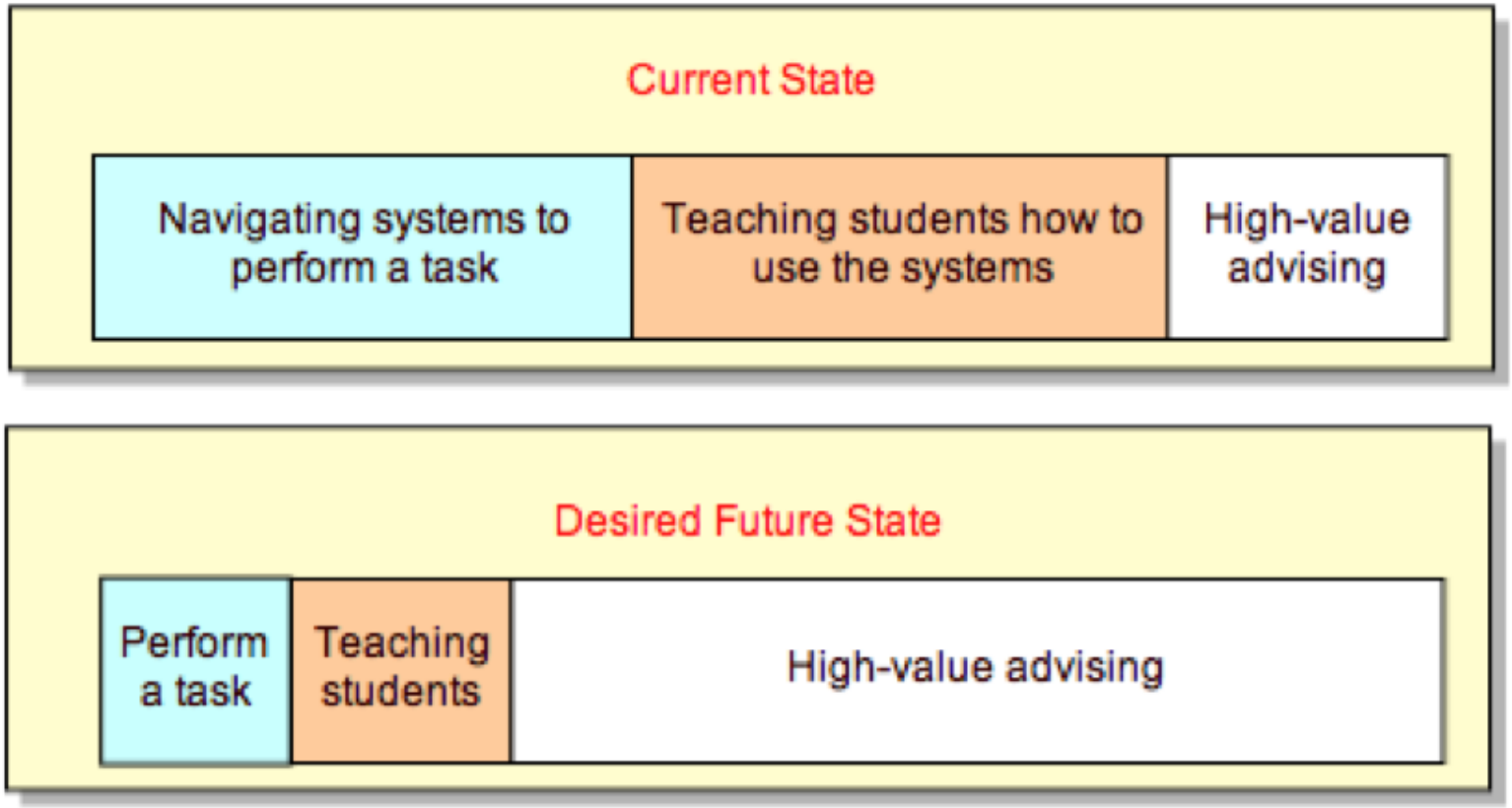
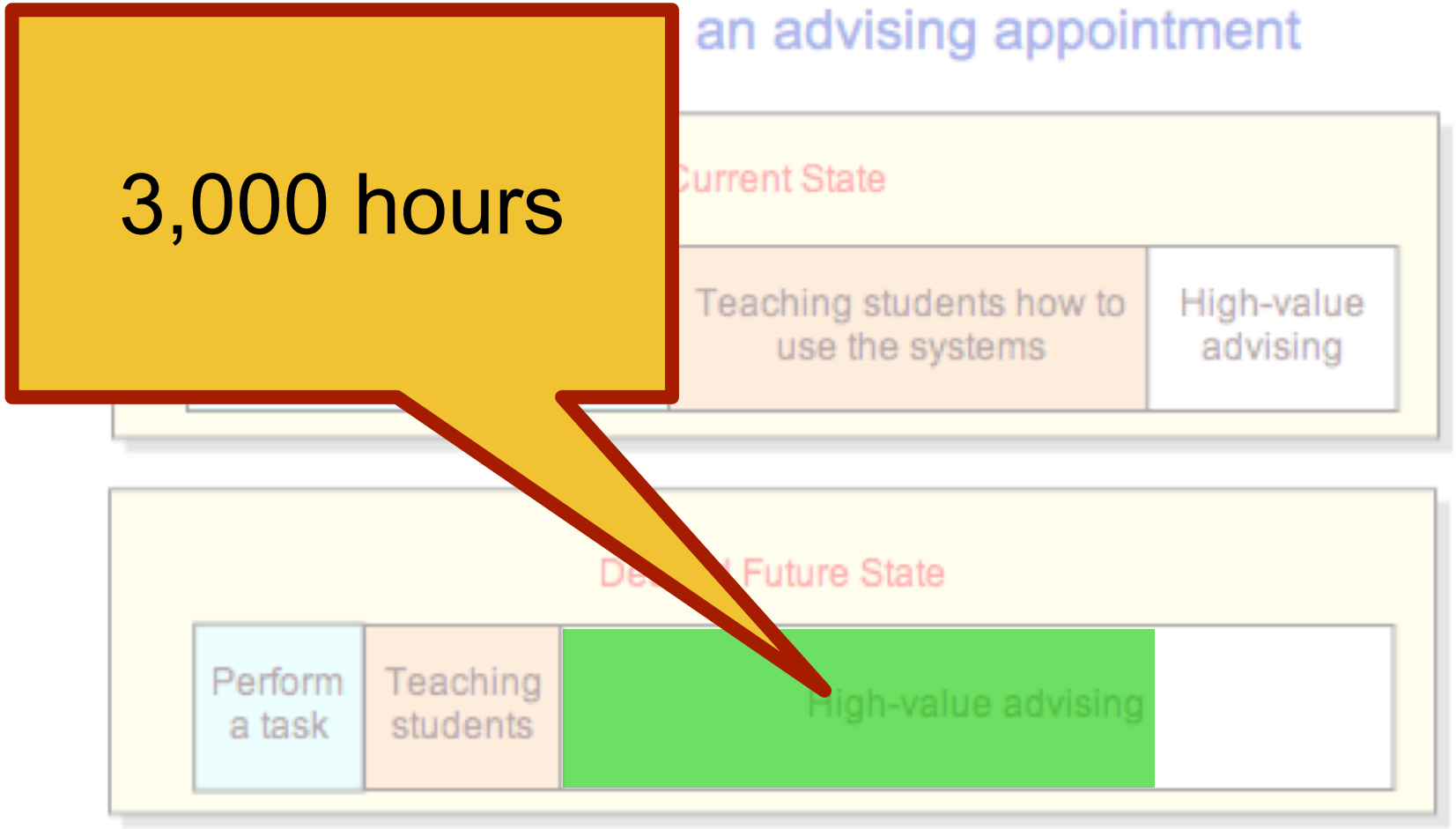
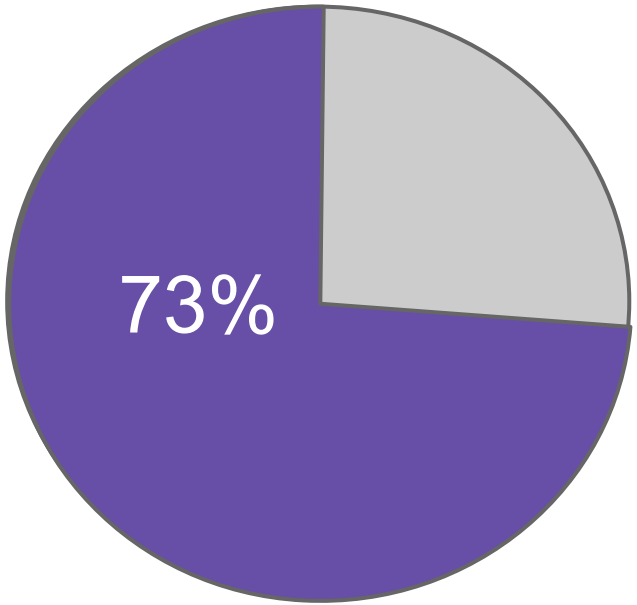
Enrollment Management
Communication Services
Websites
Printing
WiscChat, Chat
Advisor LInk
Advisee Lists
email
Custom email lists
Scheduling Services
Scheduling Assistant
WiscCal
Reporting Services
CALS/Eng Query System
Query Library
ad hoc queries
Policy Services
Imaging Service
Admission Application
Other Transcripts
Advisor Notes Service
Advising Notes
Unit Specific Services
Local Services
Big Circle= Big Impact
Broken
Works
Training
HR
Assign Advisors
Manage Advisees
Scheduling
On-Boarding
Administrative Pipeline
Off-Boarding
Analytics
Evaluation
Curriculum Development
Professional Development
Jim Phelps
Jan 4, 2012, Version 1.3.2
AARB Core Diagram

Division of time in an advising appointment




an advising appointment
3,000 hours
Current State
Teaching students how to use the systems
High-value advising
Future State
Perform a task
Teaching students
High-value advising

Focus of EA



Aligning business and IT vision and strategies, delivering strategic business value and enabling a major **business transformation.**

- Betsy Burton, VP Distinguished Analyst, Gartner
  Best and Worst Practices in Enterprise & Application Architecture. 29 August 2013

Creating Future Viability:

Agility - *our quickness to respond*

Adaptability - *our ability to bring in new things*

Efficiency - *strategic use of limited resource*

Transparency - *connections and resourcing*

with **Appropriate Risk** *management*

Metadata Management @UW

Drivers

HR/P Intersections project

Finance Modernization

EDW, BI, Integration Platform, Planning and Budget Database Retirement and many others

Metadata Strategy

Business Outcomes

Data custodians create access policies once and they are enforced everywhere.

Data custodians can easily update and review their metadata for their core data.

Metadata management is in practice in a common way among distributed groups in a common repository.

Custodians can easily understand where their data is exposed and the security models for the data.

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

Consumers can easily discover how and where they can access and consume core enterprise data.

Consumers know how to get training and help with metadata best practices.

Consumers trust and understand the lineage and quality of data in various sources.

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	Continuous 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

Metadata Training/Communication

Uniform Security Management: Semantic DAC

Expanding DAC/SMAT to cover API access

Rationalize Metadata Repositories

Metadata Strategy

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Metadata Strategy

Highlights Gaps

Defines the services needed to fill the gaps

Guides the roadmaps to build those services

Resources:

EA Wiki Space: https://wiki.cac.washington.edu/display/EA/Enterprise+Architecture

email: phelpsj@uw.edu

ITANA: http://itana.org

ITANA wiki: https://spaces.internet2.edu/display/itana/Home

EA at UW

What are we working on.

CORPORATE EXECUTIVE BOARD®

WHAT THE BEST COMPANIES DO

ENTERPRISE ARCHITECTURE EXECUTIVE COUNCIL

Rechartering EA

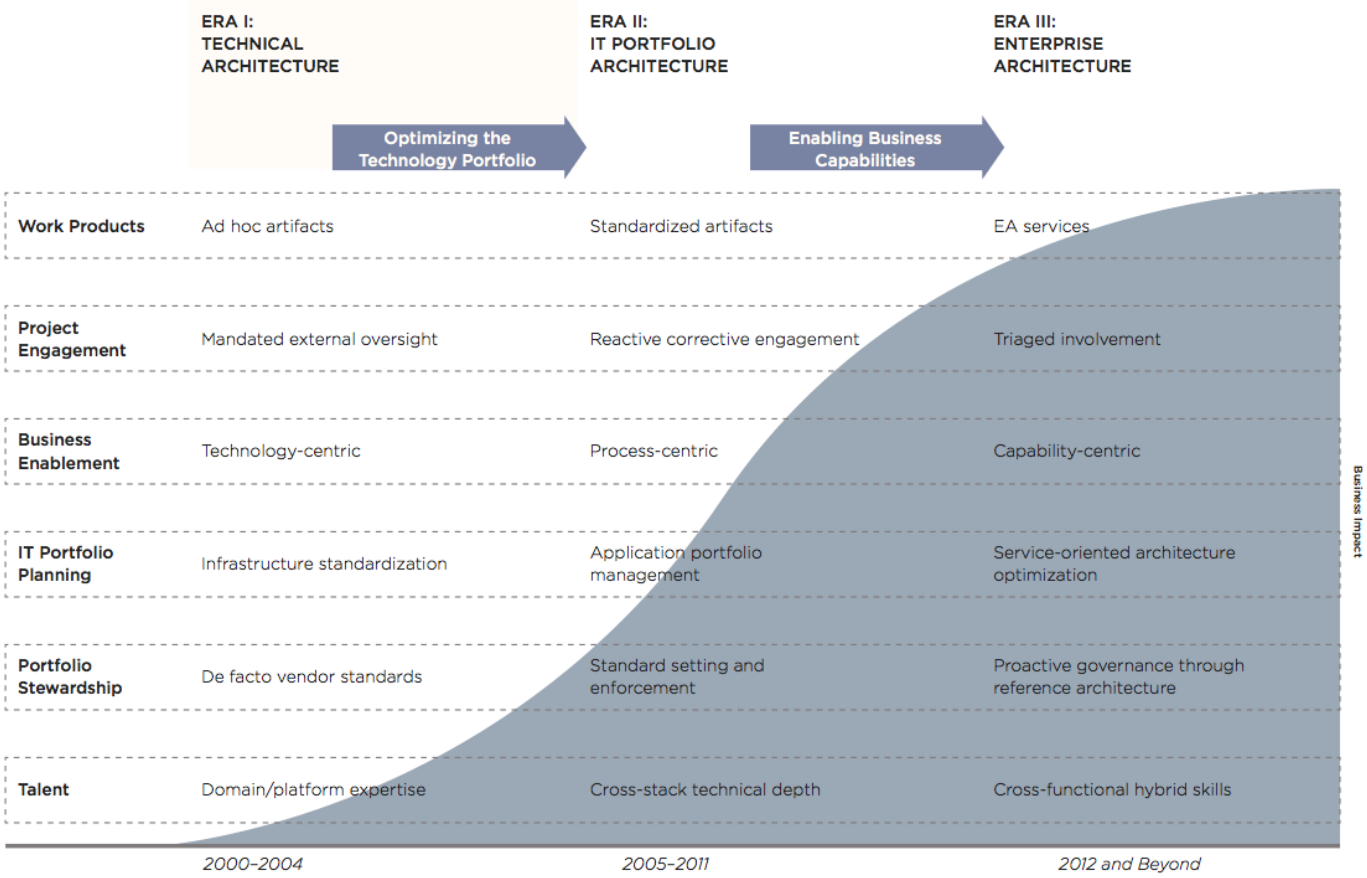
A New Operating Model for Actionable Strategy and Scalable Project Engagement

CORPORATE EXECUTIVE BOARD
WHAT THE BEST COMPANIES DO

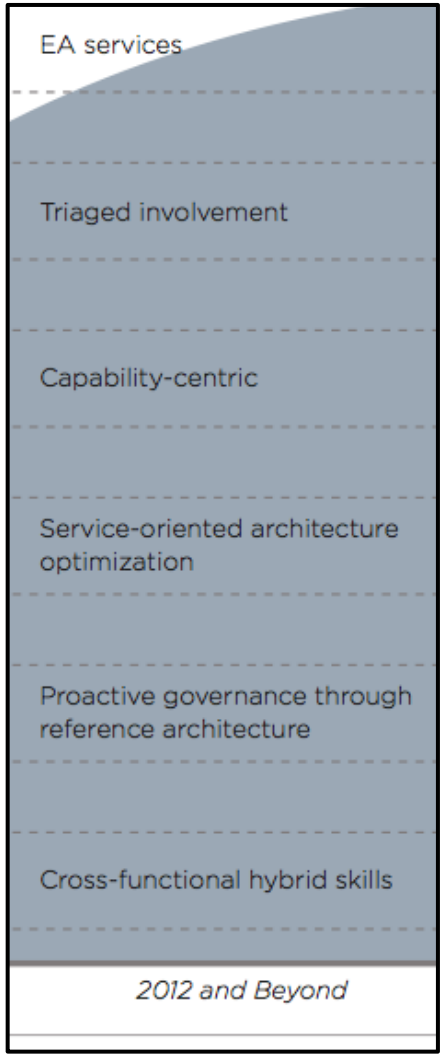
TRUE ENTERPRISE ARCHITECTURE EXTENDS BEYOND IT

To rise to the challenge of enterprise architecture's mission amid fundamental corporate IT shifts, EA groups must address six functional priorities.

- **Era I–Era II:** Enterprise architecture evolved from an infrastructure focus to a full-stack purview.
- **Era II–Era III:** EA continues to evolve, not only to optimize the technology portfolio but to drive business capability enablement.
- Practices listed in each era would be considered "mature" in their time.



Work Products	EA services
Project Engagement	Triaged involvement
Business Enablement	Capability-centric
IT Portfolio Planning	Service-oriented architecture optimization
Portfolio Stewardship	Proactive governance through reference architecture
Talent	Cross-functional hybrid skills



CEB Recommendations

- EA Services: 3 to 5 End-to-End Services
- Self Assessment Tools
- Reference Architecture Program
- EA Engagement Triage Process


EA Program
Content / Background
WHAT
How

EAST Formation Team

Heidi Barta, Organizational Development Manager, OVP, UW-IT

Cassy Beekman, Technology Manager, Computing Infrastructure

Chuck Benson, Assistant Director, Finance & Business Services, Facilities Services

Rupert Berk, Enterprise Solution Architect, EA

Anja Canfield-Budde, Director, Enterprise Data & Analytics

Jenni Laughlin, Program Manager, CONCERT Program

Jason Myers, Associate Director, Office of Research Information Services

Piet Niederhausen, Business Architect, CONCERT Program, Steering Committee Member, ITANA

Service	Description
Future State Planning & Roadmapping	Working with domain experts to develop future state documents, reference architectures and roadmaps. Managing the repository of these artifacts.
Solution Design & Alignment	Working with teams to align their solutions to the future state and roadmaps. Helping teams design solutions that meet the architectural and business goals of the UW. Capturing the impact of the solution on various architectural artifacts (Principles, Roadmaps, Future State documents, etc.).
Concept and Business Case Development	Working with change leaders to develop their concepts and ideas and turn them into actionable business cases where appropriate. Helping change leaders to understand the business value and impact of their concepts.
Assessment and Impact Analysis	Assessing the impact of decisions and designs on both the business and technical architecture. Analyzing the impact on architectural debt.
Initiative Support & Delivery	Helping change leaders keep initiatives aligned with the architectural goals.

Reference Architecture Program

Reference Architecture Program

Wiki - EA - Reference Architecture Program

USABILITY

0: Formal, instructor-led training in excess of 4 hours required

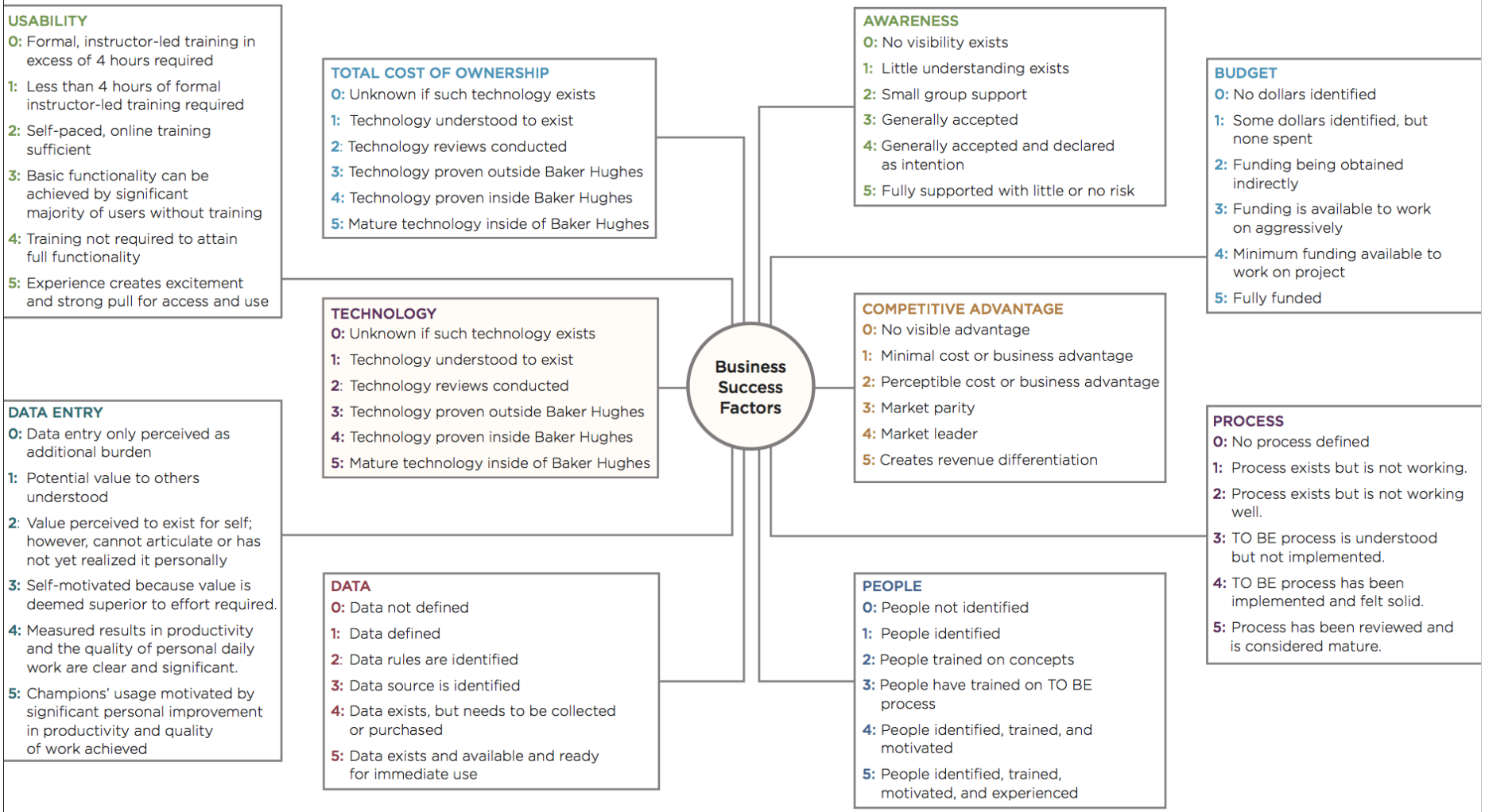
1: Less than 4 hours of formal instructor-led training required

2: Self-paced, online training sufficient

3: Basic functionality can be achieved by significant majority of users without training

4: Training not required to attain full functionality

5: Experience creates excitement and strong pull for access and use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TOTAL COST OF OWNERSHIP
0: Unknown if such technology exists
1: Technology understood to exist
2: Technology reviews conducted
3: Technology proven outside Baker Hughes
4: Technology proven inside Baker Hughes
5: Mature technology inside of Baker Hughes
AWARENESS
0: No visibility exists
1: Little understanding exists
2: Small group support
3: Generally accepted
4: Generally accepted and declared as intention
5: Fully supported with little or no risk
BUDGET
0: No dollars identified
1: Some dollars identified, but none spent
2: Funding being obtained indirectly
3: Funding is available to work on aggressively
4: Minimum funding available to work on project
5: Fully funded
TECHNOLOGY
0: Unknown if such technology exists
1: Technology understood to exist
2: Technology reviews conducted
3: Technology proven outside Baker Hughes
4: Technology proven inside Baker Hughes
5: Mature technology inside of Baker Hughes
Business Success Factors
COMPETITIVE ADVANTAGE
0: No visible advantage
1: Minimal cost or business advantage
2: Perceptible cost or business advantage
3: Market parity
4: Market leader
5: Creates revenue differentiation
DATA ENTRY
0: Data entry only perceived as additional burden
1: Potential value to others understood
2: Value perceived to exist for self; however, cannot articulate or has not yet realized it personally
3: Self-motivated because value is deemed superior to effort required.
4: Measured results in productivity and the quality of personal daily work are clear and significant.
5: Champions' usage motivated by significant personal improvement in productivity and quality of work achieved
PROCESS
0: No process defined
1: Process exists but is not working.
2: Process exists but is not working well.
3: TO BE process is understood but not implemented.
4: TO BE process has been implemented and felt solid.
5: Process has been reviewed and is considered mature.
DATA
0: Data not defined
1: Data defined
2: Data rules are identified
3: Data source is identified
4: Data exists, but needs to be collected or purchased
5: Data exists and available and ready for immediate use
PEOPLE
0: People not identified
1: People identified
2: People trained on concepts
3: People have trained on TO BE process
4: People identified, trained, and motivated
5: People identified, trained, motivated, and experienced

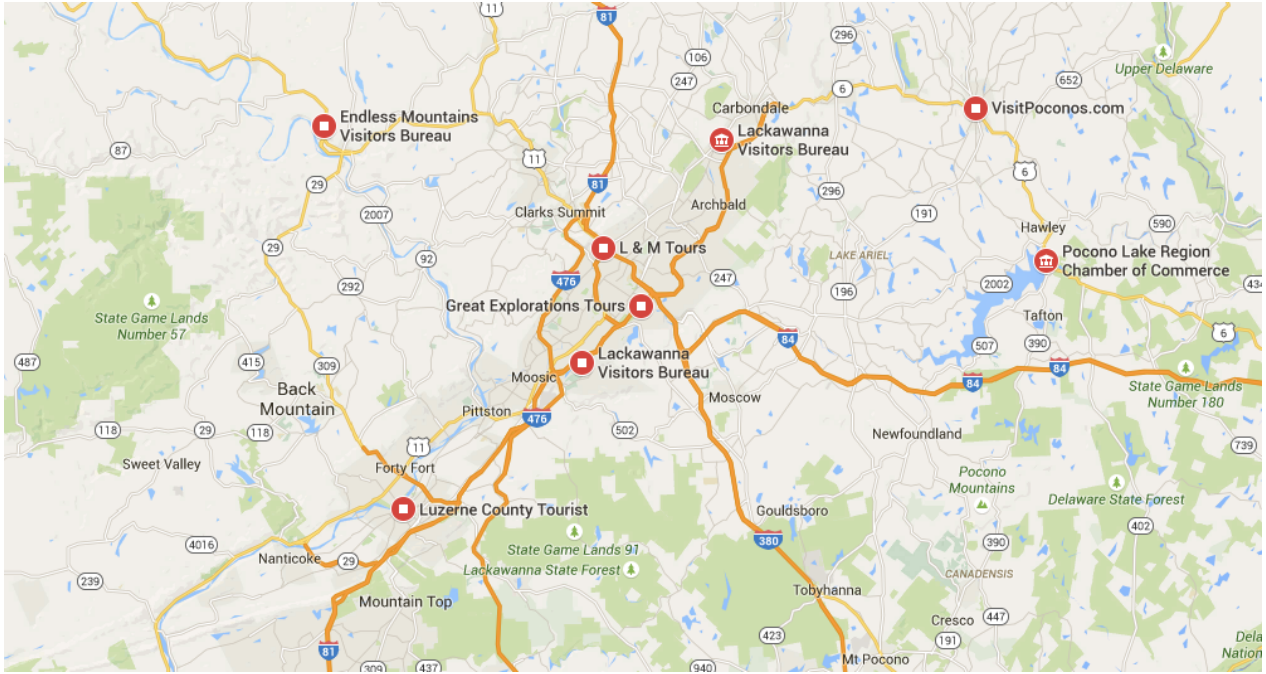
Indicator	Goal	Value	Gap to Goal	Status
1. Functionality	3.0	3.2	0.2	
2. User Experience	5.0	2.2	(2.8)	
3. Solution Infrastructure	4.0	2.9	(1.1)	
4. On-Network Experience	4.0	3.3	(0.7)	
5. Complexity	3.0	1.8	(2.0)	
6. Software and Data Integration	3.0	2.5	(0.5)	
7. Security	3.0	1.6	(1.4)	
8. Operability	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

Subject Matter Expert (SME) Map



Resources:

EA Wiki Space: https://wiki.cac.washington.edu/display/EA/Enterprise+Architecture

email: phelpsj@uw.edu

ITANA: http://itana.org

ITANA wiki: https://spaces.internet2.edu/display/itana/Home

Corporate Executive Board: http://www.executiveboard.com/

Gartner: http://www.gartner.com/technology/home.jsp

Wikipedia:

Enterprise architecture (**EA**) is "a well-defined practice for conducting enterprise analysis, design, planning, and implementation, using a holistic approach at all times, for the successful development and execution of strategy. Enterprise architecture applies architecture principles and practices to guide organizations through the business, information, process, and technology changes necessary to execute their strategies. These practices utilize the various aspects of an enterprise to identify, motivate, and achieve these changes."