**Rational** ® software

# Achieving consistency between business process models and operational guides.

*How Rational and WebSphere software enable enterprise documentation in SOA environments*

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**Achieving consistency between business
process models and operational guides.**
Page 2

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### Contents

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**Introduction**

"Forget the low-hanging fruit. We're tripping over watermelons."–Anonymous

As the rate of adoption of service-oriented architecture (SOA) continues to rise, more IT organizations are experiencing the benefits of improved business alignment and increased agility. This success stems from a better understanding of the business itself and the relationship between business processes and software services.

This white paper explores a side benefit of SOA that many organizations may not have considered because the supporting capabilities have not been available until recently. Specifically, a new integration between IBM WebSphere® Business Modeler and IBM Rational® Method Composer software can help technical writers more easily keep enterprise operations manuals in sync with changes that are made to business processes, resulting in more accurate and timely documentation that benefits the entire enterprise.

**Highlights**

*The integration between WebSphere Business Modeler and Rational Method Composer can help improve the productivity and job satisfaction of technical writers as well as help streamline training processes while reducing inaccurate guidance.*

In addition to helping to improve the productivity and job satisfaction of technical writers, the integration between the WebSphere Business Modeler and Rational Method Composer tools can benefit your organization in other ways. How? Consider the following questions:

- How long does it take to train your employees to follow a business process?
- How often do employees make mistakes as a result of inaccurate guidance? What is the business impact of those mistakes?
- How often are transactions delayed due to incomplete guidance? How much time is wasted searching for answers? What is the business impact of those delays?
- How easy is it for employees to drill down by role to see the details of the various activities to which they have been assigned?
- How easy is it for employees to drill down on a product to see how to build it and how it will be checked for quality? Can they review examples to use as a basis for their work?

This white paper explores the repercussions of outdated documentation on employee morale, enterprise efficiency and productivity. It also demonstrates how integrated IBM tools can make process documentation more accurate and timely, while improving technical writer and business analyst productivity.

**The pitfalls of outdated process documentation**

Inaccurate or incomplete operations manuals can generate more problems than benefits. Operations manuals are intended to speed up training and provide a baseline for expected operating procedures; however, when employees discover inaccuracies or omissions, they may begin to distrust the guidance and start to look elsewhere for information. Occasionally they may unknowingly follow outdated guidance and end up in violation of recent policy changes, sometimes requiring significant remediation efforts. Unless properly managed, these situations can result in low morale and high attrition rates.

*For operations manuals to be effective, they must be up-to-date, accurate and complete.*

Forgoing operations manuals altogether is not a good option. New hires need guidance, and to avoid chaos, the enterprise needs a baseline of expectations. That's why most organizations consider operations guides to be a necessary evil. But the more they can improve the accuracy and streamline the maintenance of guides, the better.

*Accurate operations manuals are a key tool for setting a baseline of expectations for processes across the enterprise.*

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**Highlights**

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*The integration between IBM solutions enables technical writers to easily view business process models in easily navigable formats.*

**A better way to document processes**

The new integration between WebSphere Business Modeler and Rational Method Composer software, released with Rational Method Composer, Version 7.2 software, provides tools that can help technical writers keep operations manuals current. Using a standards-based model designed specifically for capturing and organizing process documentation, Rational Method Composer can present the details of WebSphere Business Modeler business process models from a variety of perspectives in an easily navigable Web interface, as well as in more traditional document formats, such as Microsoft® Word or Adobe® PDF documents. Moreover, you can tailor the process information to include as much detail as necessary—including examples, concept guidance, checklists and roadmaps—to make it easily digestible by the employees who will consume it.
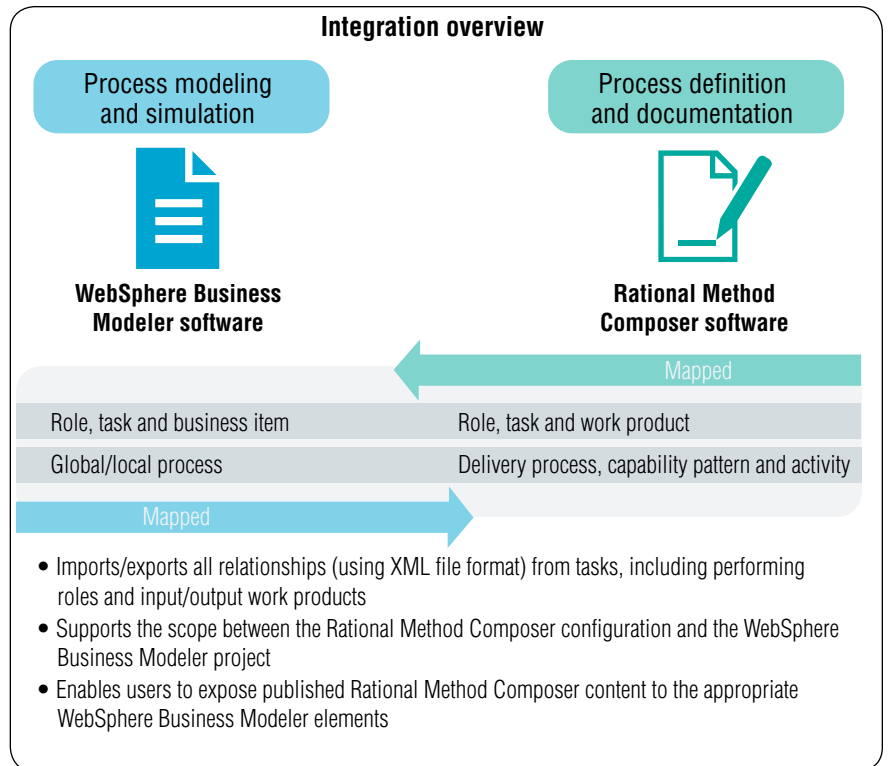
**Integration overview**

Process modeling and simulation

Process definition and documentation

**WebSphere Business Modeler software**

**Rational Method Composer software**

Mapped

| Role, task and business item | Role, task and work product |
| Global/local process | Delivery process, capability pattern and activity |

Mapped

- Imports/exports all relationships (using XML file format) from tasks, including performing roles and input/output work products
- Supports the scope between the Rational Method Composer configuration and the WebSphere Business Modeler project
- Enables users to expose published Rational Method Composer content to the appropriate WebSphere Business Modeler elements

*Figure 1: Overview of the integration*

*Technical writers can rely on a centralized repository to collaborate on process models and operational guides and receive automated alerts when processes change.*

IBM Rational Asset Manager software can also help in keeping operations manuals up to date by providing a centralized repository that you can use to collaborate on process models and operational guides. By subscribing to a business process in Rational Asset Manager, technical writers can be notified of changes so they know to update the corresponding operations manual. They can package and manage the operations manual as part of the business process asset, since it's really just a different perspective of the same business process. And they can use discussion forums to read, post or reply to questions concerning the business process so that the writers and other subscribers stay current.

**What if our business processes aren't modeled yet—that is, we have no watermelons?**

In the context of the introductory quote, watermelons are already-modeled business processes.

*Modeling business processes helps support greater understanding of processes enterprisewide while simplifying the training manual update process.*

We assume that most readers of this white paper have modeled their business processes using WebSphere Business Modeler software. If that's not the case, now is a good time to consider using the WebSphere Business Modeler tool to capture your business processes. If you need some background on why this is a good idea, refer to www.ibm.com/soa. In a nutshell, modeling your business processes will help you:

• Support an improved understanding of your business.
• Identify and validate improvement opportunities (by comparing simulation results between as-is and to-be process models).
• Communicate more easily with software development teams responsible for building the software that automates your business processes by relying on a standard, easy-to-use format.

*Technical writers can subscribe specific processes and be notified of changes.*

**Getting started**

To illustrate how to create operations manuals from business process models, we will use a fictional company, JK Enterprises, which recently deployed a new account-opening process as part of an SOA transformation effort. The company's existing operations manual for account opening is now out of date and needs to be refreshed. Rather than trying to highlight all the changes directly on the corporate intranet site, JK Enterprises decides to use Rational Method Composer to generate the new version of the manual and assigns the task to Teresa, a technical writer.

To begin, Teresa searches through the various process models stored in Rational Asset Manager (see figure 2) for the latest version of the account-opening process. When she finds the right process, she subscribes to it and uses the notification functionality of Rational Asset Manager to contact Bill, the business analyst responsible for the model. She asks Bill for a version of the account-opening process that she can use as a basis for her operations guide.

*Exporting process models to Rational Asset Manager is easy, thanks to the integration between the WebSphere and Rational products.*
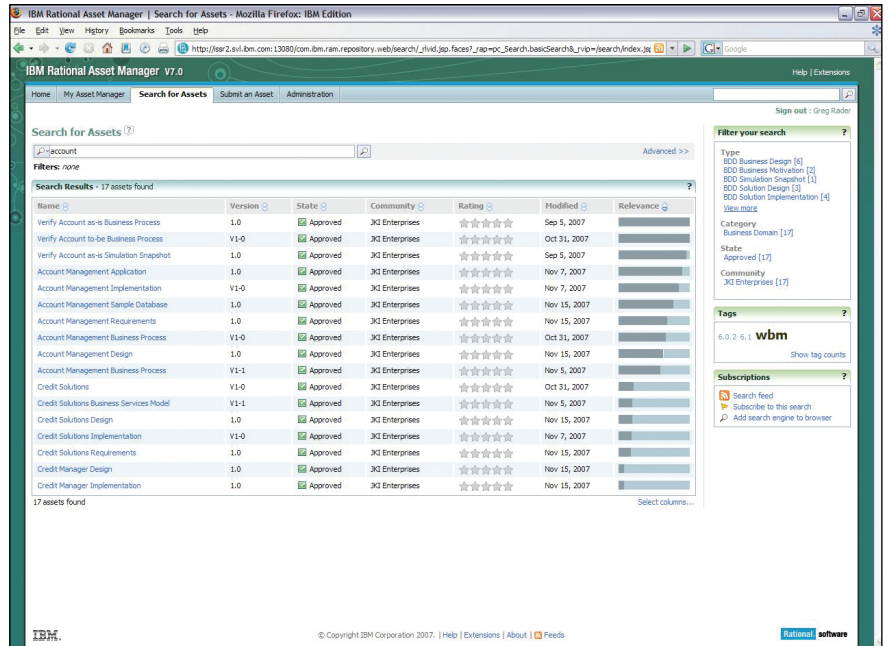


*Figure 2: Searching for the account-opening process in Rational Asset Manager*

Bill opens the project in WebSphere Business Modeler, exports the model as requested and adds it as part of the asset in Rational Asset Manager, as seen in figure 3.
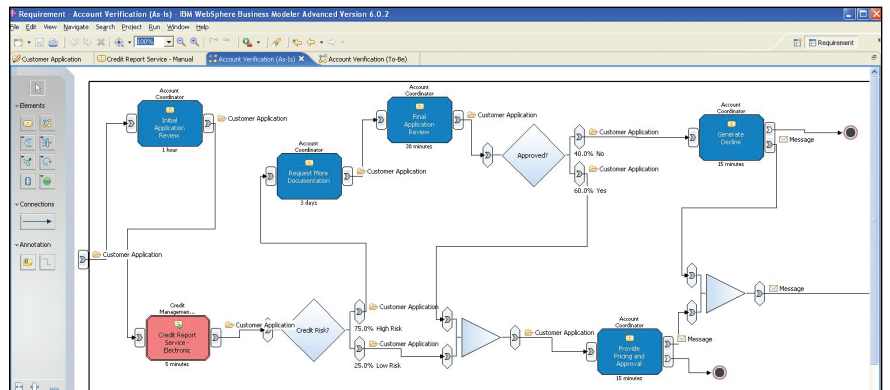


*Figure 3: Exporting the model into Rational Asset Manager*

*Rational Method Composer enables users to review all of the relevant elements from a process model.*

Since she has subscribed to the asset, Teresa is automatically notified by Rational Asset Manager as soon as the new file is added. She downloads the model and imports it into Rational Method Composer by selecting the WebSphere Business Modeler project option of the Rational Method Composer import wizard.

After the import completes, Teresa reviews the content in Rational Method Composer and sees that it contains all the relevant elements from the WebSphere Business Modeler process model, including business items (as work products), tasks (as tasks), resources (as roles) and process flows (as delivery processes). Using the browse perspective, which is shown in figure 4, she notes that she's able to navigate from a role to all relevant activities and work products, or from a work product to all relevant roles and
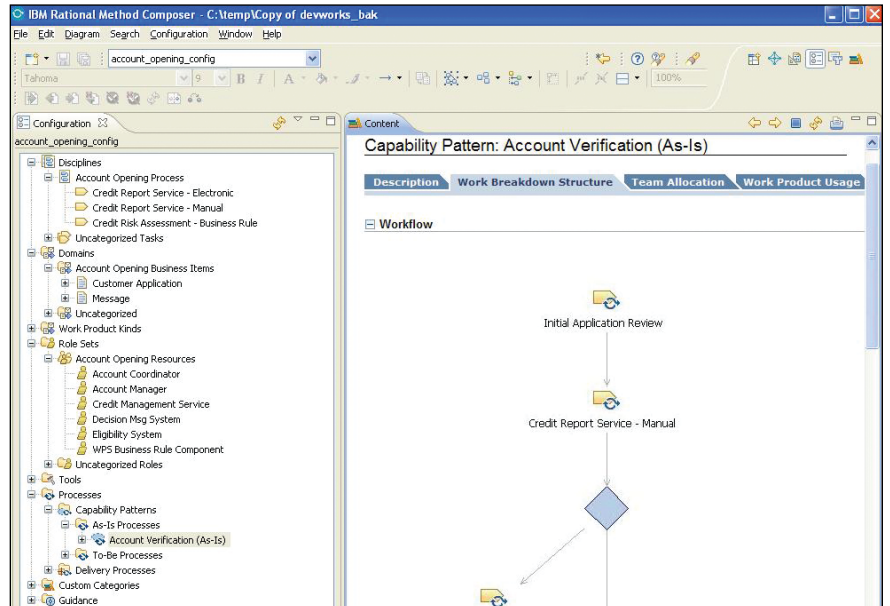


*Figure 4: Browsing a process in Rational Method Composer*

*The time and effort it takes to update existing manuals can be significantly reduced with the help of WebSphere Business Modeler and Rational Method Composer.*

activities. She also reviews the process flow diagrams and discovers that she can drill into the elements to explore the various dimensions of the process directly from the diagrams. This is exactly the kind of navigation that JK Enterprises employees need from their operations guides in order for them to be effective.

With the framework of the process successfully imported from WebSphere Business Modeler to Rational Method Composer, Teresa begins migrating the contents of the existing operations manual on the company intranet into Rational Method Composer. Most of the existing guidance is documented at the activity level, so that's where she starts. She copies the text from the Web site and pastes it into the description field of the relevant activity, comparing it to the documentation that was imported from WebSphere Business Modeler and making revisions as needed.

After specifying all the activities, Teresa turns her attention to specifying the roles and work products involved in the process. Again, she starts with the documentation that was imported from the WebSphere Business Modeler process model descriptions and makes revisions as needed.

*Technical writers can include sample forms as well as best practice documents to increase users' understanding of processes.*

Keeping the end user of the manual in mind, Teresa decides to include some sample account applications in various states to show new account coordinators how to properly complete applications. In figure 5, you can see how she creates new guidance elements for each example and attaches them to the activities where users may need to reference them.
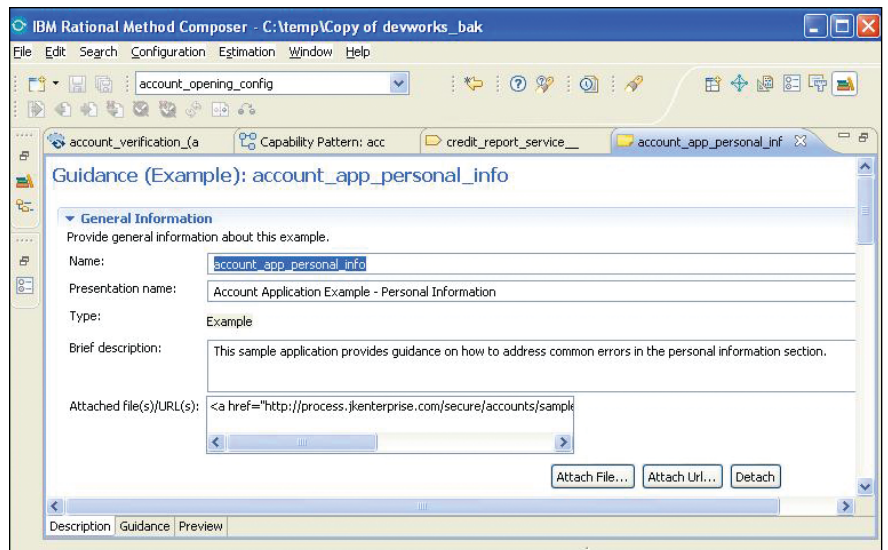


*Figure 5: Adding an example as a guidance element in Rational Method Composer*

Finally, Teresa includes some concept documents to explain the various considerations and issues readers should be aware of when opening accounts, such as best practices and how to spot profiles of rejected applications.

**Achieving consistency between business
process models and operational guides.**
Page 12

***Processes can be published easily
on the company intranet and
shared with relevant employees.***

### Publishing operations manuals to an intranet

Now that Teresa has captured and documented the account-opening process
in Rational Method Composer, she publishes the process to the company
intranet and makes it available to all the account coordinators, as shown in
figure 6. In addition, she publishes the process in PDF format for training and
auditing purposes.
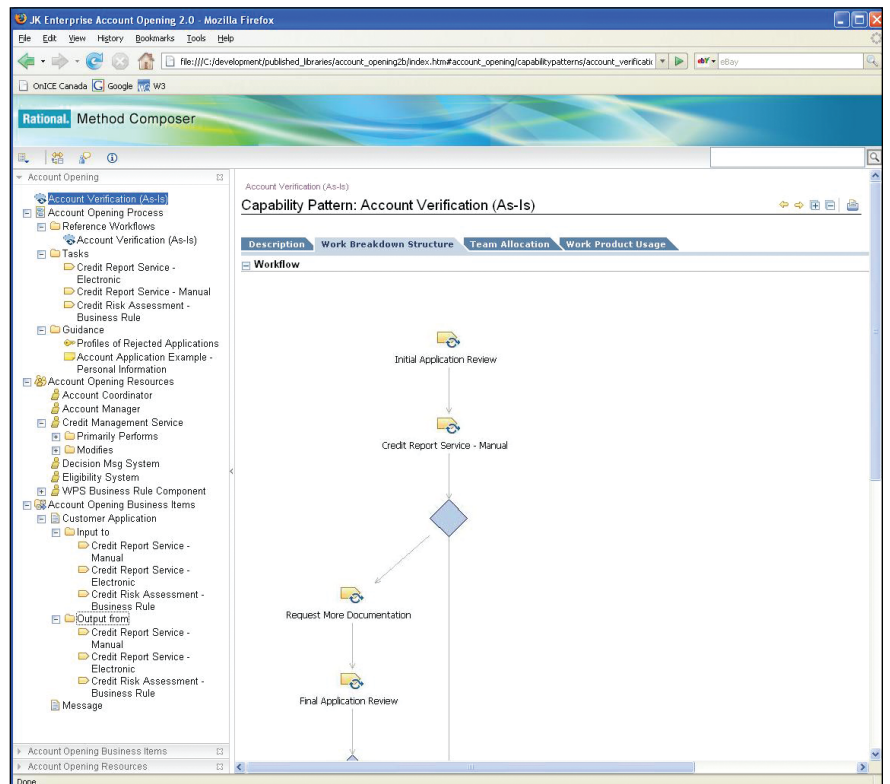


*Figure 6: Viewing the published operations manual in a Web browser*

*Operations manuals can be updated regularly based on parameters set fourth by a governance team.*

As one final step in her bookkeeping, Teresa adds the contents of her new plug-in to the business process asset in Rational Asset Manager. This way, she can manage all the artifacts related to the process of opening an account as a single asset.

**Staying in sync**
Over the next six months, Teresa receives positive feedback and is asked to move several other operations manuals to the new format. In fact, the governance team decides to require updates to every operations manual whenever a business process is changed. The team enforces the new rule by making the operations manual a mandatory artifact for every business process asset in Rational Asset Manager, as shown in figure 7.
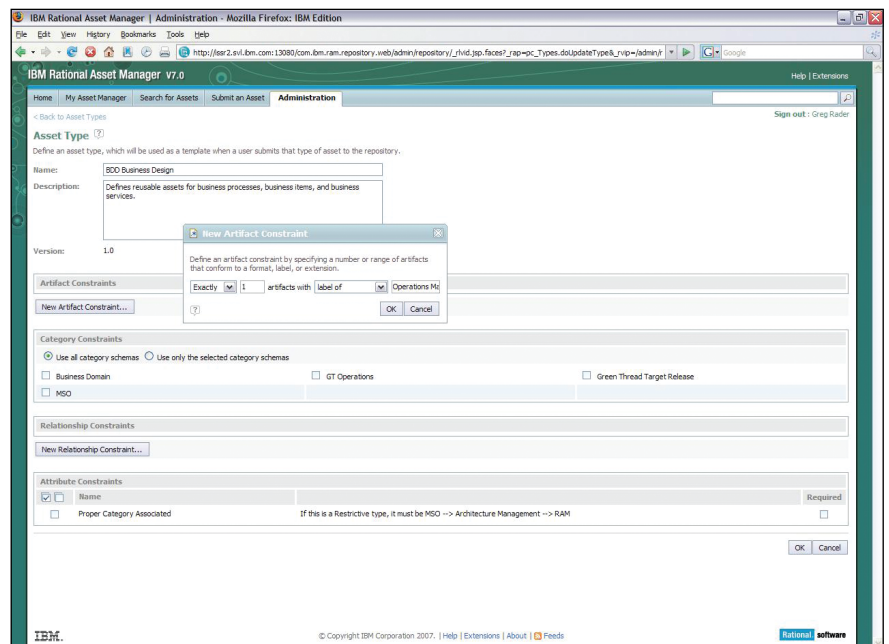


*Figure 7: Setting up an artifact constraint in Rational Asset Manager*

*The integration between WebSphere Business Modeler and Rational Method Composer simplifies coordination between technical writers and business analysts.*

During the time Teresa was updating the manual, Bill had identified several other ways to improve the account-opening process, and thanks to the agility gained by using an SOA, the software development team can implement the changes in record time. Under normal circumstances, updates to the operations manual would lag the changes in production, but because Teresa has subscribed to the account-opening process in Rational Asset Manager, she is notified of the creation of a new version as soon as it becomes available.

Once again, Teresa imports the process into Rational Method Composer and is able to merge most of the new changes with the existing content by reviewing the log file to see what has changed; then she reconciles the content as needed. Once the guidance is updated, she coordinates with Bill to ensure that the content is accurate and that the publishing of the operations manual update occurs on the same day the updated business process goes into effect.

**Highlights**

*The benefits from the integration between WebSphere Business Modeler and Rational Method composer include more efficient operation manual updates, fewer inaccuracies in manuals and improved training for new employees.*

## Conclusion

Before the integration between WebSphere Business Modeler and Rational Method Composer, Teresa struggled to keep pace with all the changes made to business processes. As a result, operations manuals were rarely up to date and seldom used due to the risk of inaccuracies. Now she can manage the changes more efficiently — and use of the manuals is widespread. Best of all, ramp-up time for new employees has improved significantly and retention is at an all-time high.

Bill is in a much better position as well. He no longer feels like a lightning rod for handling discrepancies between the deployed business processes and the operations manuals. Instead, he focuses on getting the most out of the business processes he owns and on collaborating with Teresa to communicate improvements.

Ask Teresa, and she might tell you it's her writing prowess that makes her operations manuals such a hit, but when she gives her acceptance speech at the writers guild, don't be surprised to hear her call out WebSphere Business Modeler, Rational Method Composer and Rational Asset Manager software as major contributors to her success. No doubt she's a great writer, but even great writers need great tools.

**For more information**

To learn more about IBM WebSphere Business Modeler, IBM Rational Method Composer and IBM Rational Asset Manager software, contact your IBM representative or IBM Business Partner, or visit:

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