Getting Started with METIS 3.0 Visual Planning Library

For Windows NT® and Windows® 95/98 Users

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Introduction

The METIS Visual Planning Library (VPL) is a collection of templates and domains for modeling business and technology environments and the relationships that exist throughout these environments. The Visual Planning Library is used to create models for business and technical planning.

This document provides information on using METIS 3.0 and the new templates, domains, and features of the Visual Planning Library. The contents of the VPL are described, including new features available in this release, how to migrate a model based on the METIS VPL 2.x, and other tips for using the VPL.

Other VPL Resources

Detailed information on the Visual Planning Library is available in the following:

- VPL 3.0 Help File

  Access the help file from the VPL 3.0 program group in your Start menu under Programs, METIS 3.0.

  From a model based on a template, access the help file by right–clicking the Online Document object in the lower–right corner of the template and selecting Open Document.

- Tooltips

  Tooltips are available by hovering your mouse over an object or object type in either the modeling space or the left pane trees.

- What's This? Help

  Access this help by clicking the What's This? button on the toolbar or in a dialog box and then clicking where you want more information.

Installing METIS VPL

The setup program installs all elements of the Visual Planning Library. The Typical install option sets up only VPL Basic, which is sufficient for most models. Other options are installed using the Custom install option.

Install METIS 3.0 before installing the Visual Planning Library. Be sure to install METIS 3.0 in a different directory than METIS 2.x.

Notes:

- You do not need to uninstall METIS 2.x and VPL 2.x to install METIS 3.0 and VPL 3.0. You should keep METIS 2.x and VPL 2.x installed until you have migrated all your models.
- For information on using the Web install option, see "Publishing a VPL-based Model on the Web."

Complete the following steps to install the Visual Planning Library:

1. Run VPL30_Setup.exe.
2. Click Next on the Welcome screen.
3. Read the License Agreement and click Next if you accept the terms of the agreement.
4. Choose Typical or Custom from the Setup Options screen. Typical installs only the VPL Basic. Custom allows you to choose whether to install ADML, Issues, UML, VPL Basic, or VPL Extended.
    - **Note:** Install VPL Extended only if you are migrating a 2.x model that uses "extended" objects. If you are not sure whether your model uses "extended" objects, do not install VPL Extended now.

5. Select the METIS 3.0 directory. The default directory is the directory where METIS 3.0 is installed. This is the directory you should use.
6. The installation program will check that you have enough space on your computer for the VPL to be set up.
7. Choose the Start Program folder where you want the VPL shortcuts to be created. The default is METIS 3.0\VPL 3.0. Click Next to continue.
8. Click Next on the Ready screen to install the VPL.

Migrating a Model to Use VPL 3.0

Because of enhancements made to the VPL in release 3.0, you may need to edit your model to successfully migrate it to VPL 3.0. The specific changes you need to make depend on what domains your model uses and whether or not you want to use the new default symbols.

To migrate a model to use the new Visual Planning Library, you need to:

1. Make a backup copy of your model.
2. Edit your METIS 2.x model as necessary for migration to VPL 3.0 and to prepare for conversion to METIS 3.0 format.

   Note: Make all edits to your model before converting wherever possible. METIS 3.0 will attempt to "clean" your model and may delete references before you have a chance to fix them in the 3.0 version.
3. Convert your model to METIS 3.0 format and install missing files.
4. Edit your converted METIS 3.0 model as necessary to complete migration to VPL 3.0.

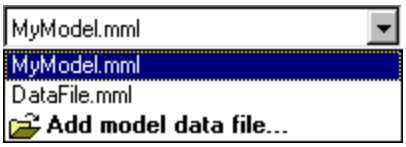
The following sections provide detailed instructions for migrating your model. Recommendations are given for which edits to make before converting and which to make after converting.

Backing Up Your Model

Important! Make a backup copy of your model before converting and editing it. Edits are made manually using a text editor, which increases the chances of introducing errors in your model. Also, when converting your model, METIS 3.0 automatically "cleans" your model (for example, by deleting references to unavailable files) and may inadvertently delete needed information. You may need to revert to your METIS 2.x model.

1. Make a copy of your model file and any associated data files.

   Note: To determine what data files are associated with your model, open your model in METIS 2.x and display the files listed in the Model Data Files drop down list box in the METIS toolbar.



2. Make a copy of any custom symbol files and other custom METIS (.mml) files used by your model. Use the same directory structure. For example, if custom symbol files are located in a directory called "symbols" under your model directory, replicate this same directory structure for your converted model.

Note: You do not need to copy any GEM or VPL metamodel files from the METIS 2.x program directory (typically C:\Program Files\METIS2.2). The METIS 3.0 version of these files are installed when you install METIS 3.0 and VPL 3.0. If you have any custom metamodel files in the METIS 2.x program directory, see the Getting Started with METIS 3 document for instructions on migrating these to METIS 3.0 format.

Deleting the Business Activity Container

The Business Activity Container in the Business Activity Domain is no longer available. If your model uses this container, you must relocate objects into another container and delete the Business Activity Container. Otherwise, you will get a No Host status for the business_activity_container.mml file in the Load State window when you open your model in METIS 3.0.

Notes:

- To determine if your model uses this container, open your model in METIS 2.x. Display the Object tree. If the Business Activity Container object type is listed, your model uses this container.
- You must perform this procedure **before** opening the model in METIS 3.0. Otherwise METIS will mark this file as No Host in the Load State window and delete the reference to this file when you save the model.

1. Open your model in METIS 2.x.
2. Create a new container from the Modeling domain.
3. Relocate the Business Activity objects and any other objects from the old Business Activity Container to the new container. To relocate the objects, select them, then click your mouse on any of the selected objects until a blue rectangle appears. Relocate the objects to the new container.
4. Delete the old Business Activity Container. Make sure the Delete Confirm dialog indicates only one object and one view are being deleted.

Using the Visual Channel Consulting BIO Domain

If your Visual Channel Consulting (VCC) model refers to the **BIO Domain**, you must edit it to refer to the **VCC BIO Domain**. Otherwise, you will get a No Host status in the Load State window for the bio_domain.mml file when you open your model in METIS 3.0.

Notes:

- To determine whether your VCC model uses the **BIO Domain**, open the model in METIS 2.x and look for **BIO Domain** in the Domain tree.
- You must perform this procedure **before** opening the model in METIS 3.0. Otherwise METIS will mark this file as No Host in the Load State window and delete the reference to this file when you save the model.

1. Open your .mml model file in WordPad or another text editor.
2. In the model code, find every occurrence of:

   <http://mml.ncr.com/mml/domains/**bio/bio_domain**.mml#1>
3. Replace with:

   <http://mml.ncr.com/mml/domains/**vcc/vcc_bio_domain**.mml#1>
4. Save your model file as a text file.

If your model includes Categories as well as Channels, you can load the VBD BIO Domain to gain access to the Category object type. See "Loading a Domain" for complete instructions.

Using the VPL 3.0 Default Symbols

VPL 3.0 contains a new set of default symbols providing a 3-D look to containers and objects. Any object in your model that uses the default symbol will automatically be updated to use the new symbol when you open your model in METIS 3.0. Containers and objects with applied symbols do not automatically use the new symbols.

Note: Using the new default symbols may require extensive adjustment to objects and text so that they display at an appropriate size for readability. Once you see the new symbols, you may choose to use the old symbols again by following the procedure under "Using the VPL 2.x Symbols."

Using the New Container Symbol

The container symbol does not default automatically to the new container symbol. To use the new container symbol, you must modify the model file, then revert the symbol to use the default as described in the following steps.

To modify the model **before** conversion to release 3.0 (recommended), complete the following steps:

1. Open your .mml model file in WordPad or another text editor.
2. Find each of the modelview sections. There will be a section corresponding to each modelview in your model. One way to do this is to find every occurrence of "modelview" followed by an ID number in parentheses.
3. In each modelview section, add the following line (with no carriage returns) immediately before the "domains" entry:

   ```
   (viewstyle
   <http://mml.ncr.com/mml/metamodels/veap/vpl_viewstyles.mml#1>)
   ```

   If a similar line already exists in your model (for example, a line that refers to METIS1x_viewstyles.mml), you should replace it with the new code.

4. Save your model file as a text file.

To modify the model **after** conversion to release 3.0, complete the following steps.

> **Important!** Do not complete these steps until you have made all necessary edits to your METIS 2.x model.

1. Open your .kmv model file in WordPad or another text editor.
2. Find each of the modelview sections. There will be a section corresponding to each modelview in your model. One way to do this is to find every occurrence of "modelview" followed by an ID number in quotation marks.
3. In each modelview section, add the following line (with no carriage returns):

   ```
   <viewstyle-link xlink:role="viewstyle"
   xlink:href="http://xml.ncr.com/xml/metamodels/veap/vpl_viewstyles.kmd#oid1
   "/>
   ```

   If a similar line already exists in your model (for example, a line that refers to METIS1x_viewstyles.mml), you should replace it with the new code.
4. Save your model file as a text file.

Reverting to use the New Default Symbols

To display containers and objects with applied symbols using the new default symbols, complete the following steps.

> **Important!** Do not complete these steps until you have made all necessary edits to your METIS 2.x model.

1. Open your model in METIS 3.0.
2. Right-click on a container, choose Symbol, then Revert Symbol.

Note: You can select multiple objects, then right–click on any of them to choose Symbol, then Revert Symbol. All selected objects will revert to their default symbols.

Using the VPL 2.x Symbols

If you prefer to retain the look and layout of the 2.x model, you must modify your model file to use the 2.x symbols.

To modify the model **before** conversion to release 3.0 (recommended), complete the following steps:

1. Open your .mml model file in WordPad or another text editor.
2. Find each of the modelview sections. There will be a section corresponding to each modelview in your model. One way to do this is to find every occurrence of "modelview" followed by an ID number in parentheses.
3. Immediately before the domains entry in each modelview section, add the following line (with no carriage returns):

   (viewstyle
   <http://mml.ncr.com/mml/metamodels/veap/2x_viewstyles.mml#1>)

   If a similar line already exists in your model (for example, a line that refers to METIS1x_viewstyles.mml), you should replace it with the new code.
4. Save your model file as a text file.

To modify the model **after** conversion to release 3.0, complete the following steps.

> **Important!** Do not complete these steps until you have made all necessary edits to your METIS 2.x model.

1. Open your .kmv model file in WordPad or another text editor.
2. Find each of the modelview sections. There will be a section corresponding to each modelview in your model. One way to do this is to find every occurrence of "modelview" followed by an ID number in quotation marks.
3. In each modelview section, add the following line of code (with no carriage returns) between the "model–link" and "child–link" entries:

   ```
   <viewstyle-link xlink:role="viewstyle"
   xlink:href="http://xml.ncr.com/xml/metamodels/veap/2x_viewstyles.kmd#oid1
   "/>
   ```

   If a similar line already exists in your model (for example, a line that refers to METIS1x_viewstyles.mml), you should replace it with the new code.

5. The new code will look similar to the following:

   ```
   <modelview id="oid1" title="xxxxxx" primary-flag="true" zoom-level="0.865413" x="-
   1172.25" y="-1212.61" seq="79" text-scale="1">

   <model-link xlink:role="model" xlink:href="#oid27003"/>

   <viewstyle-link xlink:role="viewstyle"
   xlink:href="http://xml.ncr.com/xml/metamodels/veap/2x_viewstyles.kmd#oid1
   "/>

   <child-link xlink:role="objectview" xlink:href="#oid108"/>

   </modelview>
   ```

4. Save your model file as a text file.
5. When you open your model file in METIS, you may need to use Revert Symbol to display the correct symbols. To do this, right–click the object(s), choose Symbol, then Revert Symbol.

Converting Your Model to METIS 3.0 Format

When you open a METIS 2.x model in METIS 3.0, METIS automatically converts the model to xml format. METIS notes any files it cannot find, such as custom symbol files, data files, or metamodel files (for example, VPL Extended files). You can then install any missing files so that the model loads cleanly.

Complete the following steps to convert your model and to identify and install missing files.

1. Start METIS 3.0 and choose **Existing File** from the startup dialog.
2. In the Files of Type drop-down list box, select **Version 2.2 files (*.mml)**.
3. Enter your model file name and click **Open**. METIS converts the model to the xml format and displays the Save All dialog.

   Note: The Save All dialog may indicate that "some files that were loaded in **mml format** were readonly". This message should go away once you have installed any missing files.
4. Click Save. METIS saves the model using the .kmv extension and any data files using the .kmd extension.
5. If the Load State window displays, note any files marked as **Not Available** or **No Host**. (You can copy and paste the contents of the window to a text editor and print for reference.)
6. Install or correct references to missing files (those marked as **Not Available** or **No Host**) as described in the following guidelines.

   - If one of the missing files is

     http://mml.ncr.com/mml/domains/bio/bio_domain.mml

review the previous section "Using the Visual Channel Consulting BIO Domain" and make the necessary edits to the METIS 2.x (.mml) version of your model.

- Note which missing files include the directory "veap_el" in their pathname; for example:

  http://mml.ncr.com/mml/domains/veap_e1/all_extended.mml

  If there are more than one veap_e1 files missing, install VPL Extended as described in "Installing the METIS VPL 3.0." If the only missing veap_e1 file is all_extended.mml, you do not need to install VPL Extended. METIS automatically deletes the reference to this file when you save the model.

- Check all model views in your model for any red cross-hatched objects or red relationship lines. These indicate missing data. Determine what file is missing and install it.

- Note any other missing files and install or copy them to your model directory. Use the same relative directory structure for your model files as that used for the METIS 2.x version of your model.

7. Close METIS.

8. After you have installed missing files and edited your model as necessary, delete all .kmv and .kmd files created when you converted your model.

9. Repeat the previous steps until there are no more missing files or you have determined that you do not need any of the remaining missing files (for example all_extended.mml).

10. To eliminate references to any remaining Not Available or No Host files, open the METIS 2.x (.mml) version of your model in METIS 3.0 once again and save it. Close METIS, then open the .kmv version of your model in METIS. You should not see a Load State window.

Review the preceding and following sections to determine if you need to edit your converted model to complete migration.

Fixing Person Objects

A bug in the Person object type in VPL 2.x resulted in the Person symbol not being used as default when a Person object was created. Instead, a white rectangle with a black border was used to display a Person. This bug is fixed in VPL 3.0 so that any new Person object you create will use the correct symbol.

To correct previous models that contained Person objects, perform the following steps.

Important! Do not complete these steps until you have made all necessary edits to your METIS 2.x model.

1. Open the model in METIS 3.0.
2. Locate and select all Person objects that do not use the VPL 3.0 default symbol. To do this, right-click on one of the Person objects, choose Select from Criteria, then All Persons. All Person objects in the current model view are selected.

VPL 3.0 default Person symbol

3. Right-click on the selection, choose Symbol, then Revert Symbol.

Note: If you open and save your model in METIS 3.0, exit METIS, then open the model again, METIS will automatically fix any Person objects previously displayed with a white rectangle.

Loading a Domain

Each template automatically loads certain domains. If the template does not load a domain that is needed for your model, you can load it manually by using the following procedure.

1. Open your model in METIS 3.0.
2. Find the domain you want to load in the **File** tree. The path for each VPL domain is given in the corresponding domain topic in the VPL Help file; for example:

   Path: <METISdir>\xml\http\xml.ncr.com\xml\domains\veap

   where <METISdir> is the directory where METIS was loaded.
3. Double–click on the domain to load it.
4. Click the **Loaded** tab (you may have to move the vertical bar to the right to see the **Loaded** tab).
5. In the **Loaded** tree, find the domain you just loaded.
6. Click the plus sign (+) to the left of the domain name to see the contents.
7. Find the domain name in the contents of the loaded domain and drag it to the modeling space.
8. Return to the **Domain** tree and use the contents of the newly loaded domain.

What's New?

With METIS 3.0, we have created a new Visual Planning Library with several new features and enhancements to existing features. The METIS VPL 3.0 exploits many new features of METIS 3.0.

- Updated help file

  The help file describes all of the components of the metamodel organized by Template, Domain, Object Type, and Relationship Type.

- New default symbols

  The default symbols have a completely new, 3D look with icons that better identify different object types by their appearance, not just by color variations. The new templates incorporate a different container symbol as well, giving the models a completely updated look.

- Renamed templates

  Some of the templates have been renamed to avoid confusion.

  – The GITP Template has been renamed VEAP Template

  – The VCC Template has been renamed Visual Channel Consulting Template

  – The Visual Consulting Template has been renamed Visual Planning Template

- New and updated templates

  – New Architecture Description Markup Language (ADML) template

  – New Issues template

  - New Project Portfolio Management template
  - New Unified Modeling Language™ (UML) template
  - Updated Visual Channel Consulting (VCC) template
  - The VP Template is no longer available.
  - The VP Extended Template is no longer available.

  See the "Templates" section for details of each of these templates.

- New and updated domains
  - New VPL Utilities Domain contains new, general purpose criteria and layout strategies.
  - New Architecture Description Markup Language (ADML) domain
  - New Issues domain
  - New Project Portfolio Management domain
  - Updated Business Activity Domain
  - Updated People Domain
  - Updated UML Domain
  - Updated Use Case Domain

  See the "Domains" section for details of this new domain.

- New and updated object and relationship types
- New criteria
- New layout strategies to sort based on an object type's property values

The following sections describe what's new in the VPL.

Templates

General Updates

Following is a list of general updates made to the VPL.

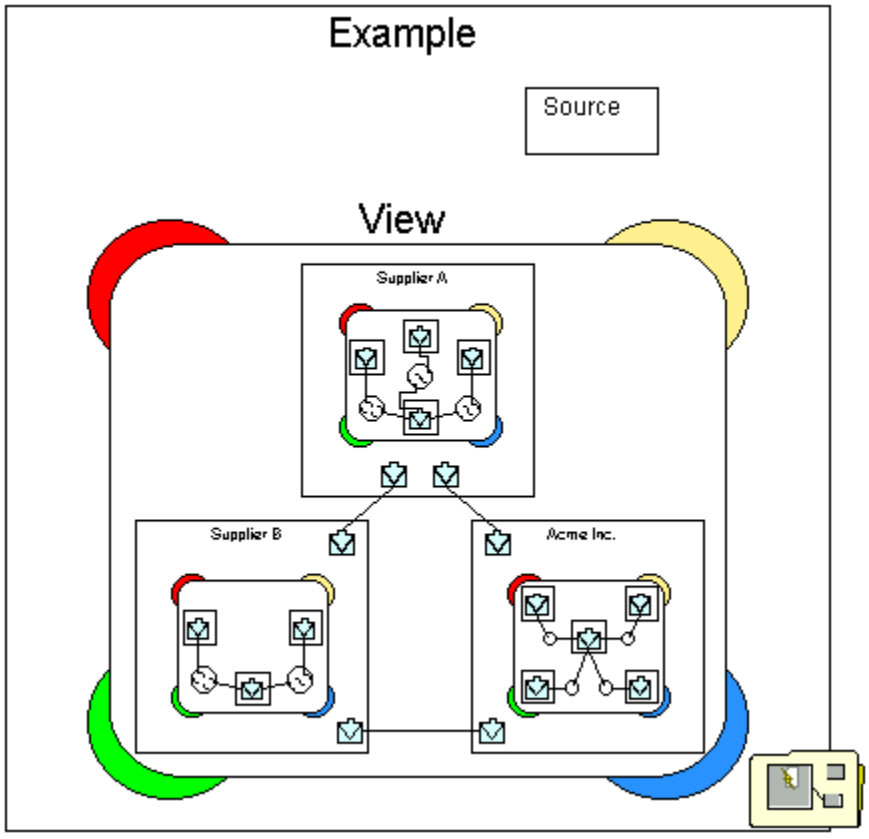
- The templates use the new symbols as the default.
- Extended domains, object types and relationship types are not installed using the Typical installation option. The Custom option must be used. See the section "Installing the METIS VPL 3.0" for more information.
- The VPL 3.0 Help File is installed into the METIS 3.0 program group in your Start, Programs menu.
- The VPL 3.0 Help File is available in new models created from the templates. Access the help file by right–clicking the Online Document object in the lower–right corner of the template and select Open Document.

ADML Template (New)

The Architecture Description Markup Language (ADML) is a simple architecture description language that can be used to express virtually any architecture model. ADML is an XML vocabulary based upon the Carnegie–Mellon ACME language. ADML was created by the Microelectronics and Computer Technology Corporation (MCC) and is now an Open Group standard.

The ADML template is provided as a starting point for creation of standard architecture models. It creates a *representation* of ADML, but not true ADML.

The following picture shows the sample model that displays when you select this template to create a new METIS model. Access Help for this template from the folder in the lower right corner of the template layout.



Domains in the ADML Template

There is only one domain in the ADML Template. It contains all of the available ADML object and relationship types.

ADML Domain

Using the ADML Template

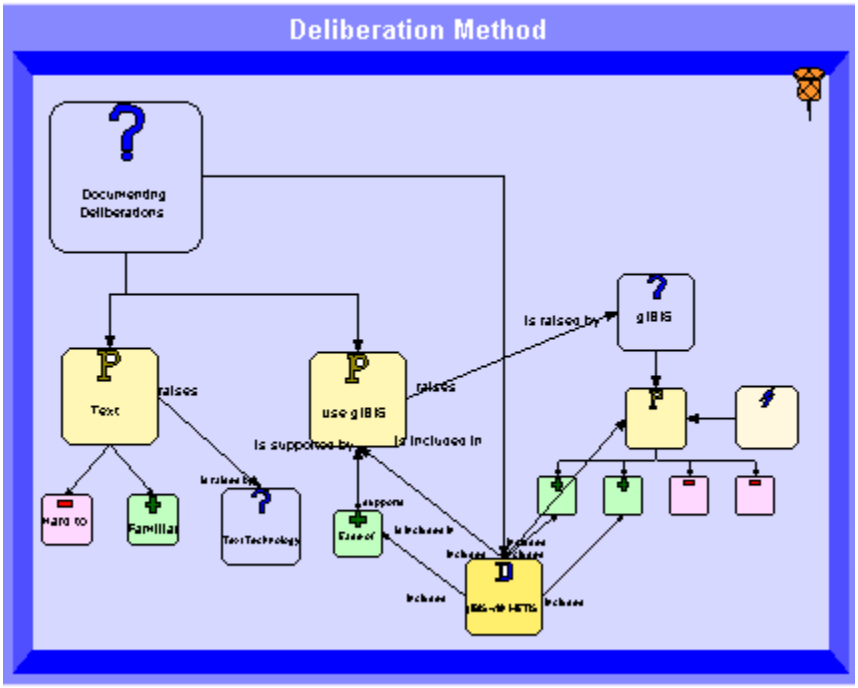
This template is a stand–alone template, with no predefined relationships to any objects outside of its own domain.

The ADML Template and corresponding domain must be installed for use. See "Installing the METIS 3.0 VPL" for more information.

Issues Template (New)

The Issues Template is a simple template to document the reasoning behind a decision. By recording the issues, positions, and eventual decisions, the thought processes may be captured, resulting in a defendable position.

The following picture shows the sample model that displays when you select this template to create a new METIS model. Access Help for this template from the folder in the lower right corner of the template layout.



Domains in the Issues Template

There is only one domain in the Issues Template. This domain contains the objects and relationships needed to document the decision–making process.

Issues Domain

Using the Issues Template

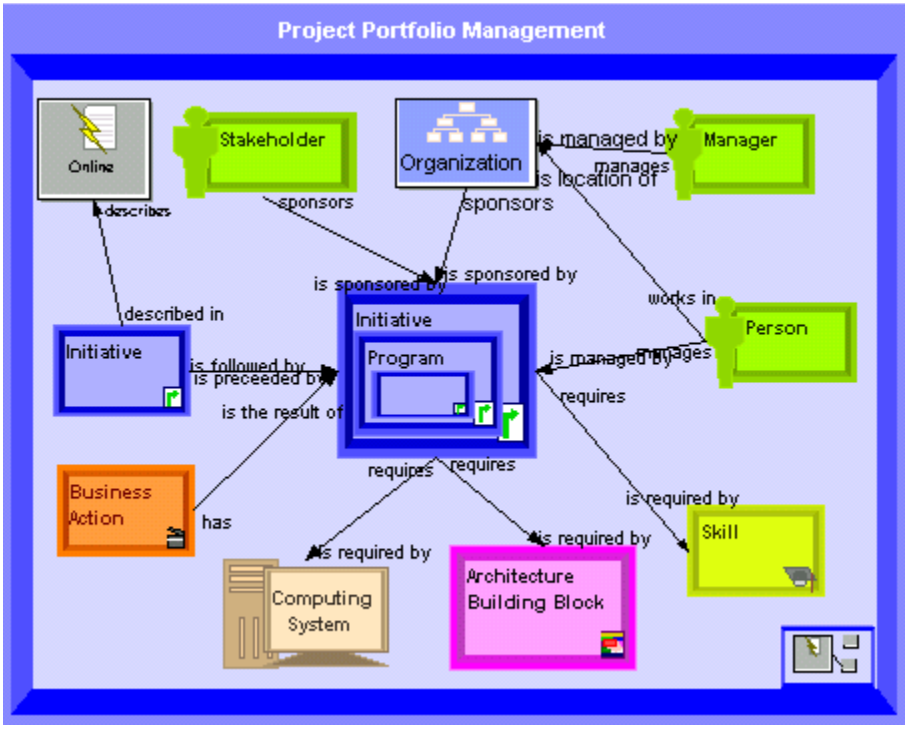
This template is a stand–alone template, with no pre–defined relationships to any objects outside of its own domain.

The Issues Template and corresponding domain must be installed for use. See "Installing the METIS 3.0 VPL" for more information.

Project Portfolio Management Template (New)

The Project Portfolio Management Template represents a stand–alone, simple format to model and evaluate initiatives that make up a company's project portfolio. By capturing information about the Initiatives, Programs, and/or Projects along with their relationships to people, skills and architecture elements, intelligent decisions and prioritization can occur.

The following picture shows the default layout of a new model created in METIS using the Project Portfolio Management Template. Access Help for this template from the folder in the lower right corner of the template layout.



Domains in the Project Portfolio Management Template

The following domains support evaluating and prioritizing projects.

People Domain

Project Portfolio Management Domain

VPL Utilities Domain

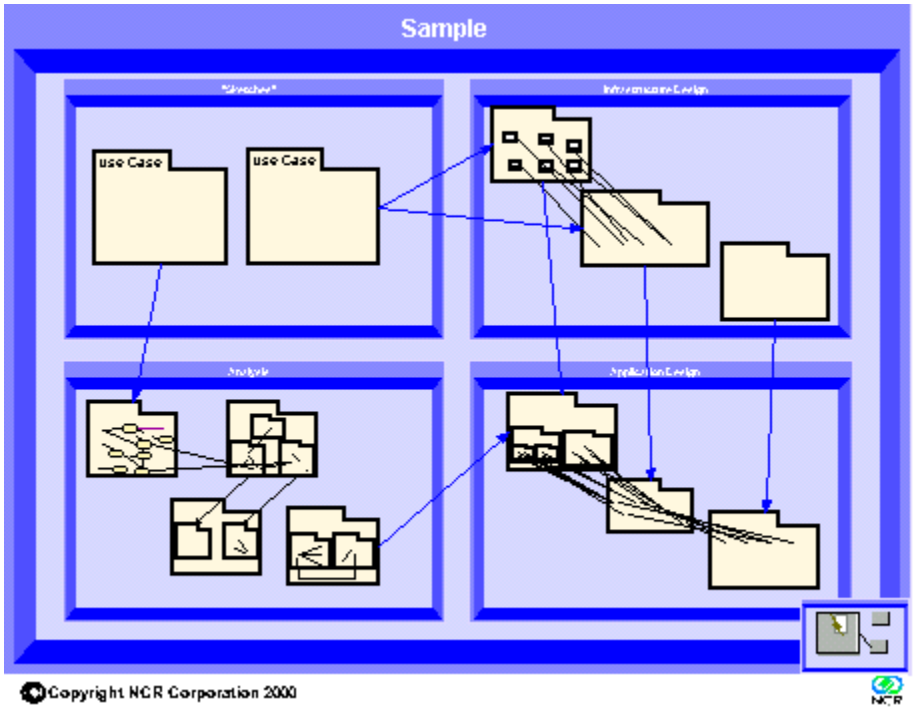
Using the Project Portfolio Management Template

The Project Portfolio Management Template is installed during the Typical installation of the VPL or by selecting VP Basic in the Custom install dialog. See "Installing the METIS 3.0 VPL" for more information.

UML™ Template

The Unified Modeling Language (UML) is designed to provide a language for documenting software system artifacts, as well as other systems. The UML has been adopted by the Object Management Group™ (OMG) as a standard for these representations. This template provides an introductory set of objects and relationships to enable the construction of a visual model using the UML concepts.

The following picture shows the default layout that displays when you select this template to create a new METIS model. Access Help for this template from the folder in the lower right corner of the template layout.



Domains in the UML Template

The following domains support UML modeling.

UML Domain

Use Case Domain

Visual Channel Consulting Template (Updated)

The Visual Channel Consulting (VCC) Template now uses the VCC BIO Domain rather than the more generic BIO Domain. The BIO Domain included both Channel and Category object types, causing duplication, while the VCC BIO Domain only includes the Channel object type.

The BIO Domain has been deleted, so models based on this template should be modified to reflect this change. See "Migrating a Model to Use the VPL 3.0" for complete instructions.

VP Template (Removed)

The VP Template is no longer available. Use one of the existing templates or create a blank model and add domains manually if desired. See the section titled "Loading a Domain" for instructions.

VP Extended Template (Removed)

The VP Extended Template is no longer available. This template loaded the VEAP_E1 (Extended) domains used by some custom models. These domains should be used only to support and migrate existing models that use these domains.

You must install the VPL Extended domains and load them manually to use them in a new model. See "Installing the METIS VPL 3.0" and "Loading a Domain" for instructions.

Domains

General Updates

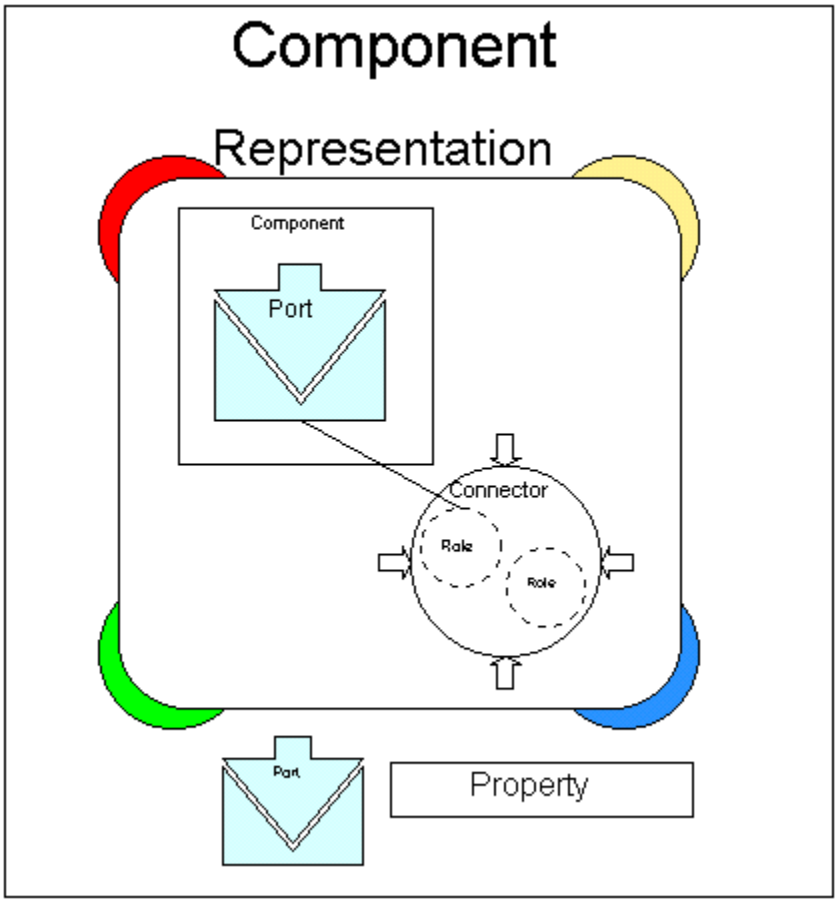
All domains have been reviewed and corrections made to descriptions and other text.

Miscellaneous objects and relationships have been added to all domains. See the VPL 3.0 help file for detailed information on the domains.

ADML Domain (New)

The ADML domain contains the basic objects and relationships necessary for modeling an architecture using the standard architecture representation. This domain is expected to evolve over time into a more robust and better-defined representation.

The following diagram shows the objects and relationships in the ADML Domain:



Object Types

Component

Connector

Port

Property

Role

Representation

Using the ADML Domain

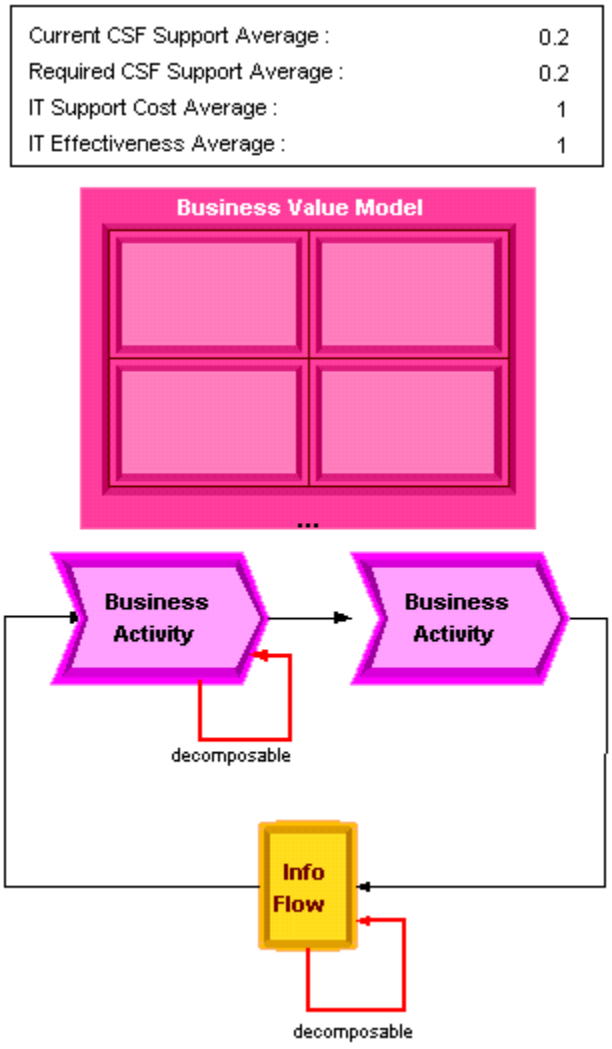
The ADML Template must be installed in order to use this domain. See "Installing the METIS 3.0 VPL" for more information.

Business Activity Domain (Updated)

This domain is used to model a prioritized list of Business Activities such as major business processes, functions, organizations, or other operational aspects of a business. Business activities are key to developing an IT architecture since computing systems, applications, and IT system users are directly involved with each business activity. Object and relationship types have been added to this domain to support the creation of a Business Value Model.

The Business Activity Container has been deleted from this domain. If your model uses this container, see "Migrating a Model to Use the VPL 3.0" for complete instructions.

The following diagram shows the objects and relationships in the Business Activity Domain:


Current CSF Support Average : 0.2
Required CSF Support Average : 0.2
IT Support Cost Average : 1
IT Effectiveness Average : 1
Business Value Model
...
Business Activity
Business Activity
decomposable
Info Flow
decomposable

Object Types

Business Activity

Info Flow

Business Activities Average

Business Value Model

Value Model Quadrant

Using the Business Activity Domain

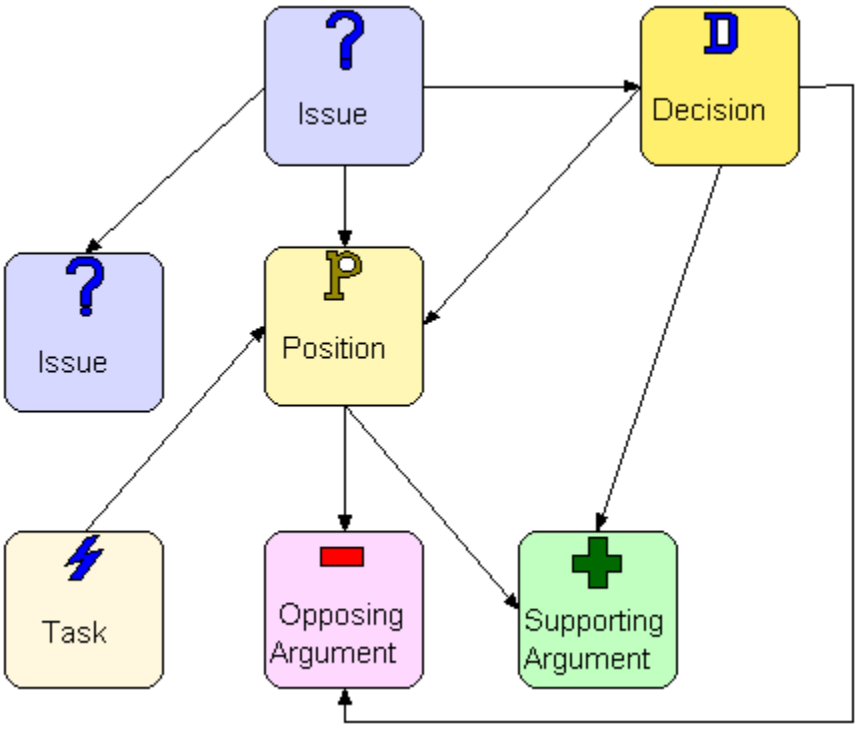
This domain is installed as part of the typical installation or by choosing VPL Basic in the custom installation options. See "Installing the METIS 3.0 VPL" for more information.

Issues Domain (New)

Description

This domain is used to capture the positions and arguments needed to reach a decision.

The following diagram shows the objects and relationships in the Issues Domain:



Object Types

Decision

Issue

Opposing Argument

Issue Position

Supporting Argument

Task

Using the Issues Domain

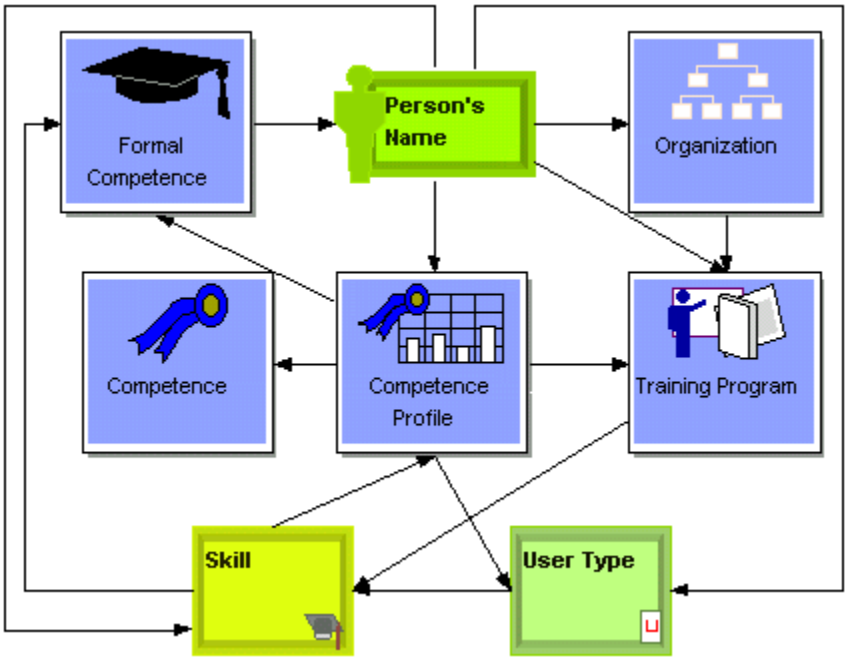
The Issues Template must be installed to use this domain. See "Installing the METIS 3.0 VPL" for more information.

People Domain (Updated)

This domain provides the means to capture details about employees of the enterprise. Competency–related objects from the GEM template have been added to provide definition of training and certification of a person.

NOTE: To fix a bug with the Person symbol in VPL 2.x, see "Migrating a Model to Use the VPL 3.0" for complete instructions.

The following diagram shows the objects and relationships in the People Domain:



Object Types

Organization

Person

Position

Skill

User Type

Competence

Competence Profile

Formal Competence

Training Program

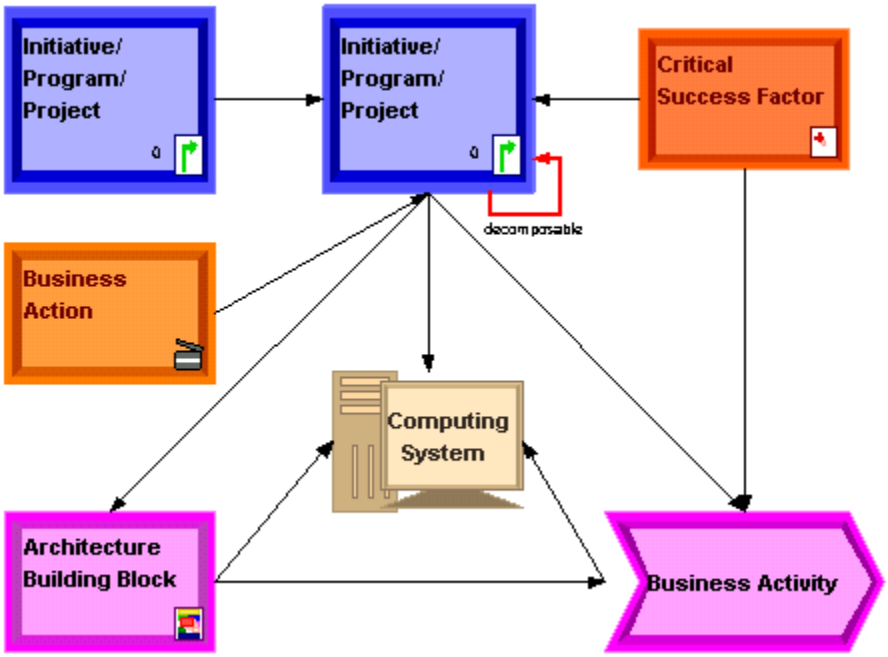
Using the People Domain

This domain is installed as part of the typical installation or by choosing VPL Basic in the custom installation options. See "Installing the METIS 3.0 VPL" for more information.

Project Portfolio Management Domain (New)

This domain contains the objects and relationships needed to provide a stand–alone environment for the prioritization of projects. An Initiative may be decomposed to represent the Programs and/or Projects it contains and any of these levels can receive a strategic value based on its relationship to either Critical Success Factors or Business Activities, or both. Other objects are included in the domain to provide relationships to business and architecture influences on the Initiative.

The following diagram shows the objects and relationships in the Project Portfolio Management Domain:



Object Types

Initiative

Business Action

Critical Success Factor

Business Activity

Architecture Building Block

Computing System

Risk

Business Requirement

Using the Project Portfolio Management Domain

The Project Portfolio Management Template must be installed in order to use this domain. See "Installing the METIS 3.0 VPL" for more information.

UML Domain (Updated)

The UML Domain provides an introductory set of objects and relationships to enable the construction of a visual model using the UML concepts. This domain is concerned with those UML objects outside of the Use Case area, which are included in their own domain.

Because of the nature of the UML Domain, no diagram is provided.

Object Types

Analysis Model

Analysis Package

Boundary Class

Collaboration Diagram

Control Class

Entity Class

Deployment Model

Design Class

Design Subsystem

Implementation Model

Module

Package

Service Package

Service Subsystem

State Machine Package

Subsystem

Use Case Model

Use Case System

Use Case Package

Workflow Process

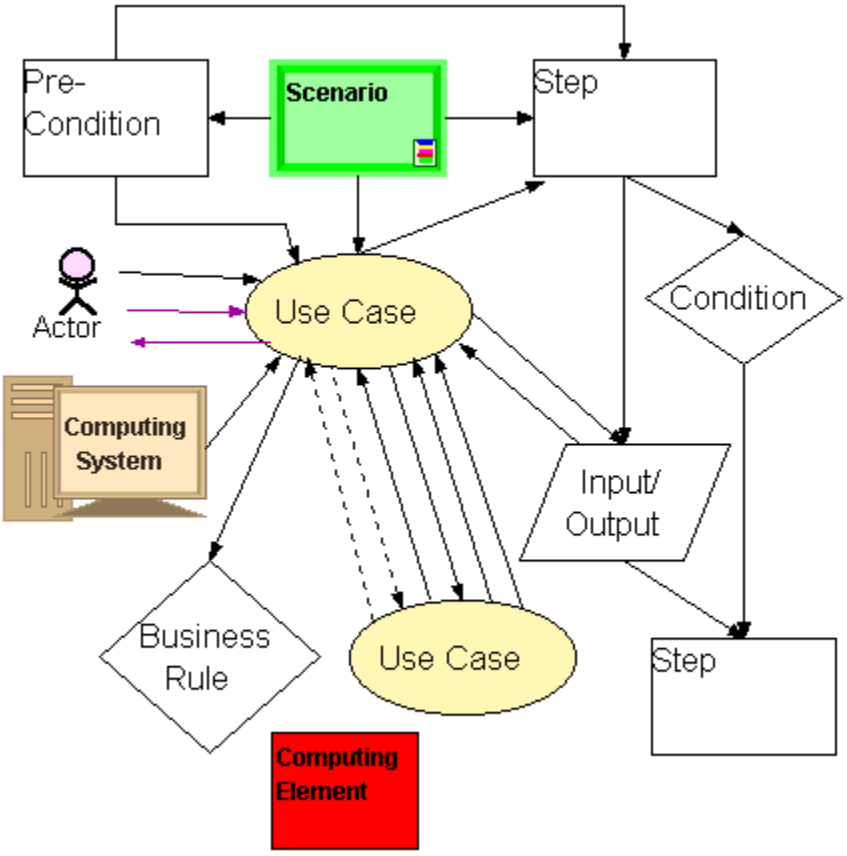
Using the UML Domain

The UML Template must be installed in order to use this domain. See "Installing the METIS 3.0 VPL" for more information.

Use Case Domain (Updated)

This domain allows modeling of a Use Case. Object and relationship types have been added to more accurately depict the information required in a Use Case definition.

The following diagram shows the objects and relationships in the Use Case Domain:



Object Types

Actor

Condition

Input/Output

Scenario

Step

Use Case

Pre/Post Condition

Computing Element

Computing System

Business Rule

Using the Use Case Domain

This domain is installed as part of the typical installation or by choosing VPL Basic in the custom installation options. See "Installing the METIS 3.0 VPL" for more information.

VPL Utilities Domain (New)

The VPL Utilities Domain provides general purpose object types, relationship types, criteria, and layout strategies for the Visual Planning Library.

Note: This domain is an extension of the Criteria Domain and has been renamed. If you have used the Criteria Domain in migrated models, it will appear in the Domain Tree as the new VPL Utilities Domain. To load this domain, you must load the criteria_domain.kmd file. See "Loading a Domain" for more information.

Object Types

Idea/Issue/Comment

Relationship Types

Idea/Issue/Comment with reference to Any Object

Any Object is rationale for Any Object

Criteria

Show Supporting Rationale

Drop on an object or selection to show all objects that are related to the selected object(s) by an "is rationale for" relationship.

Find all origin elements

Drop on an object or selection to find all objects that are the origin of a relationship to the selected object(s). This criterion will follow a path one level back.

Selected Object ← Origin

Find origin - n

Drop one of the **Find origin - n** criteria, where n is a number between 1 and 8, on an object or selection to follow a path to find the origin objects n levels back. For example, drop the criteria **Find origin - 2** on an object to follow all connected relationships back to their origin objects, then find all origins to these objects.

Selected Object ← Origin ← Origin

Find all target elements

Drop on an object or selection to find all objects that are the target of a relationship to the selected object(s). This criterion will follow a path 1 level forward.

Selected Object → Target

Find target - n

Drop one of the **Find target - n** criteria, where n is a number between 1 and 8, on an object or selection to follow a path to find the target objects n levels forward. For example, drop the criteria **Find origin - 2** on an object to follow all connected relationships forward to their target objects, then find all targets to these objects.

Selected Object → Target → Target

Layout Strategies

Nested Matrix

Drop on a decomposed object to alphabetically sort and arrange the objects nested inside.

Sorted Container

Drop on a container to alphabetically sort and arrange the objects nested inside.

Business Activities

This criterion is included to provide automatic layout of Business Activity objects created in the tree structure by a previous version of the VPL. Objects created using the new templates will use the nested structure.

Drop on a parent of Business Activities that were created using the tree structure to align the objects vertically with complete channel mapping. This criterion will not change the arrangement of Business Activities that were created using the nested structure.

Business Goals

Drop on a container that holds Goals to sort and arrange the objects based on the value of the "weight" property.

Business Objectives

Drop on a container that holds Business Objectives to sort and arrange the objects based on the value of the "strategic value" property.

Business Strategies

Drop on a container that holds Business Strategies to sort and arrange the objects based on the value of the "strategic value" property.

Critical Success Factors

Drop on a container that holds Critical Success Factors to sort and arrange the objects based on the value of the "strategic value" property.

Using the VPL Utilities Domain

This domain is installed as part of the typical installation or by choosing VP Basic in the custom installation options. See "Installing the METIS 3.0 VPL" for more information.

Miscellaneous Updates

KPI support for Visual Balanced Scorecard

An enhanced Key Performance Indicator object has been developed to facilitate the visualization of a Balanced Scorecard approach to business planning. The new object allows the entry of an expected benefit and an actual benefit at the lowest level of decomposition.

These benefit values will be rolled up into the next level of the decomposition structure. If the actual benefit is equal to or greater than the expected benefit, the object will remain its default green color. If, however, the actual benefit is less than the expected benefit, the object will turn yellow.

Future enhancements will more completely support the development of a Visual Balanced Scorecard.

Business Activity Model

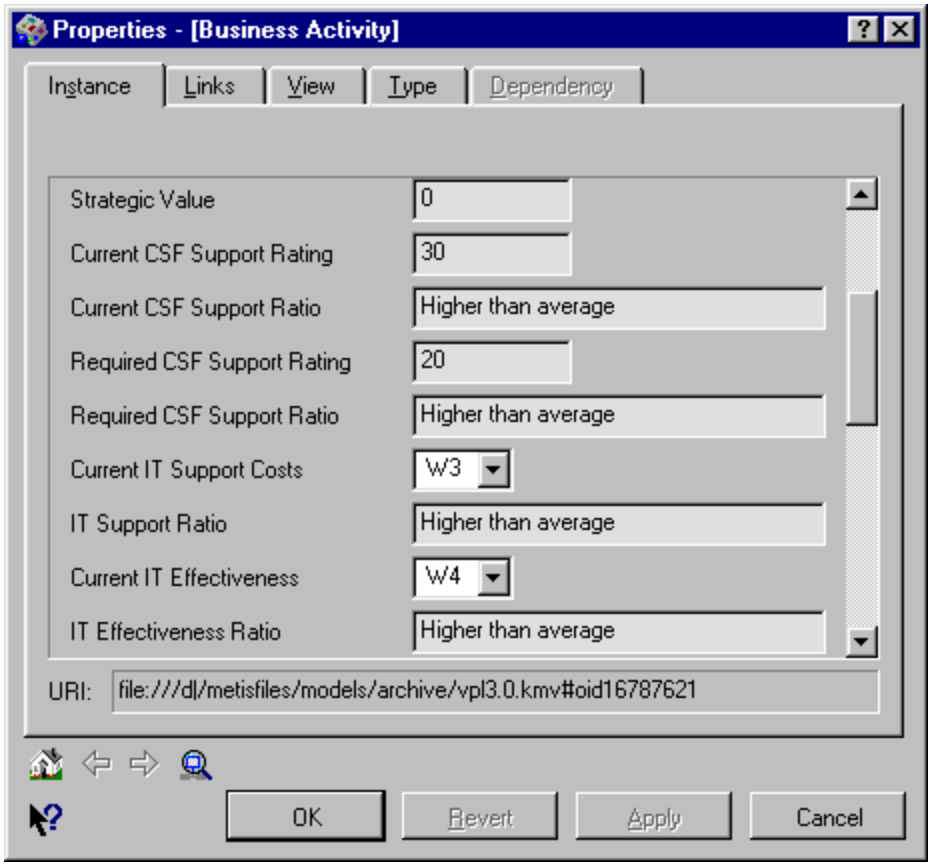
The GITP service has a Business Activity Model as part of the methodology. Until now, we were unable to support this process in the VPL. Enhancements to the Business Activity Model Domain now allow this model to be created.

In the "Critical Success Factor is supported by Business Activity" relationship, there are properties to allow you to enter the Current and Future Support Weighting Factor. These refer to the Current CSF Support Value and Future CSF Support Value in the methodology.

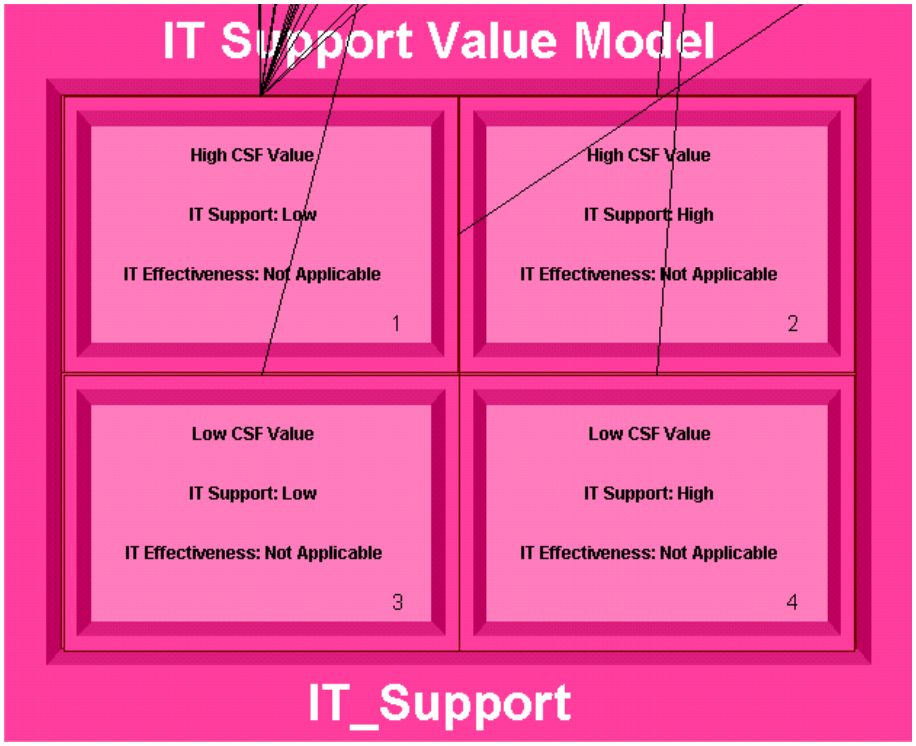
Note: You may still enter a weight to be used to calculate the Strategic Value for the Business Activity.

Within the Business Activity object, enter the Current IT Support Costs and Current IT Effectiveness.

A new object type has been developed that calculates the Averages for Current CSF Support, Future CSF Support, IT Support Cost and IT Effectiveness. Those values are used to determine the ratio for the Business Activity.



Criteria are provided to select the Business Activities that belong in each quadrant, allowing easy creation of the relationships from the Value Model Quadrant to the Business Activities.



ERwin CSV Import Rule

To import entities and their relationships, a CSV import rule is provided. The ERwin export must match the specific layout of the CSV import rule. Complete the following steps to create the ERwin export file:

1. Create an ERwin Relationship Report.
2. Choose the following in the ERwin Report Editor:

    Relationship

        Parent to Child phrase

        Child to Parent phrase

        Cardinality

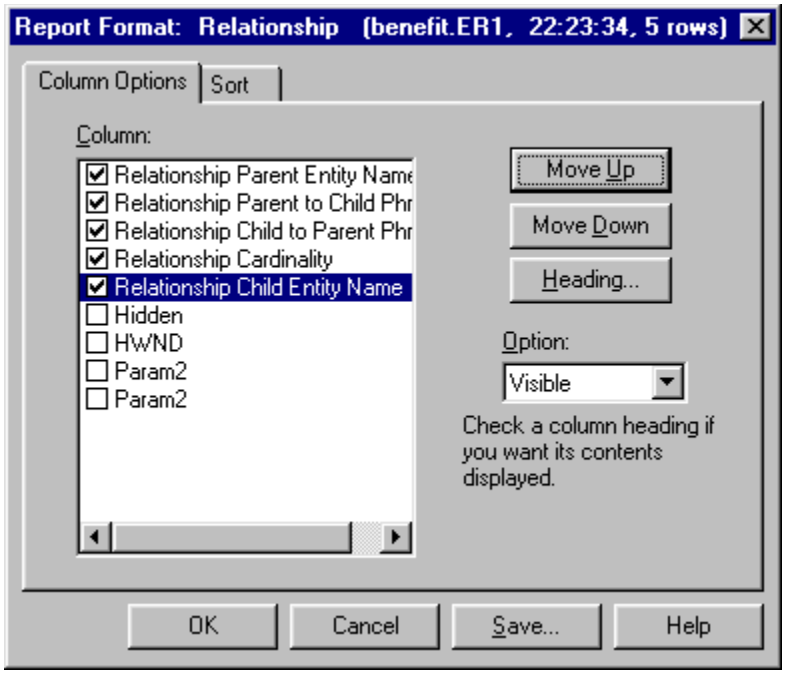
        Parent Entity

            name

        Child Entity

            name

3. Edit the Report Format as shown:



4. Save and export the result set to a CSV format file. The CSV file will have the following format:

A	B	C	D	E
Parent	Parent to Child Phrase	Child to Parent Phrase	Cardinality	Child

This format is required by the CSV Import Rule.

To execute the rule:

1. In METIS, right click on a container and choose Import CSV (or select a container and choose Import CSV from the File menu).
2. In the CSV Rule area, click Browse and navigate to your METIS 3.0 directory.

3. Open METIS3.0\xml\http\xml.ncr.com\xml\csv\csvrule_erwin.kmd
4. In the CSV Import File area, click Browse and navigate to your CSV file.
5. Click Import and the objects and relationships will be created in the selected container.

Objects

Following are miscellaneous updates made to objects:

- All objects have been reviewed and corrections made to descriptions and other text for grammatical and spelling errors.
- All appropriate object and property descriptions have been updated to suggest alternative methods of use.
- VEAP_Person has been edited to remove an error in the file that caused no symbol to be loaded. See "Migrating a Model to Use VPL 3.0" for more information.
- Date fields use the new standard METIS format.
- Information Set may now be decomposed into Info Objects.
- Info Object may now be decomposed into Attribute.
- The IT Initiative object has been renamed Initiative to support modeling of business as well as IT initiatives. The object has its strategic value calculated based on its relationship to both Business Activity and Critical Success Factor. A viewstyle has been added to allow either strategic value to be displayed on the object. New criteria have also been added to this object to find Predecessors or Successors to the Initiative and to find all Business Activities supported by the selected Initiative.

Relationships

Following are miscellaneous updates made to relationships.

- All relationships have been reviewed and corrections made to descriptions and other text for grammatical errors.
- All relationships have been updated to include a description property.
- The new relationship "Computing System connects to Computing System" has been added, with properties of network type, transport, and physical media. This relationship allows easier connection of Computing Systems to represent a network.

Criteria

Many new criteria have been added to the Visual Planning Library.

- The VPL Utilities domain contains general-purpose criteria. See "VPL Utilities Domain (New)".
- Criteria used with specific object types are described in the "Domains" section.

Symbols

Many default symbols have been changed to reflect a more 3–dimensional appearance.

The 2x style symbols are still available and may be used. If you are converting a model from METIS 2x and would like to retain the look of the

symbols in your model, you may edit your model file as described in "Migrating a Model to Use VPL 3.0".

Publishing a VPL–based Model on the Web

To publish a model that uses the Visual Planning Library, follow the instructions for "Publishing Models on the Web" in the Getting Started with METIS 3.0 guide, with the following recommendations.

For performance considerations, it is recommended that you copy all %METISHOME%\xml\http directories and their contents onto your Web server, including those under %METISHOME%\xml\http\xml.metis.no\. You can copy the files manually or use the VPL setup, as described in the following steps, to install all GEM and VPL files to your Web server.

1. Run VPL30_Setup.exe.
2. At the Setup Options screen, choose Web.
3. Specify the folder on your Web server where you want the files to be copied to.

   Note: Make a note of this location. When you run the Model Browser Wizard in METIS, enter this location when prompted for the METIS Home Location.

Be sure to copy any other metamodel files your model uses to your Web server as well.

Note: There is an error in the Getting Started with METIS 3.0 guide on the mime types to use for the Web-server configuration. The types should be:

```
application/vnd.metis-kmv kmv
application/vnd.metis-kmd kmd
```

and not

text/xml kmv
text/xml kmd

The mime type for svg-files is correct.