

ICC Process Handbook

<Customer>

2015-01-30

This document is a template for the entire Process Handbook which should be customized to fit as the resulting Artefact for the Organization & Roles, Request Process and Realization Process Workshops.

First action should be to run a find/replace <Customer> for the actual Custome’s name. The entire document needs to be fit to your needs but specific places that always need to be addressed are marked with yellow pen.

*This blue italic guide should be removed prior to sending document to <Customer>.*

# Introduction

## Purpose

The purpose of this handbook is to describe what is needed to provide an effective information and integration delivery at <Customer>. It describes the following elements of this capability:

* Services, Responsibilities, Mandate and Delimitations
* Organization and Roles
* Tools and Artifacts
* Processes

Usually, the capability describe above will be realized in the form of an Integration (or Information) Competence Center, ICC. Throughout this document, ICC is used to designate the manifestation of this capability. Not all customers will necessarily use this name or even set up an organization like an ICC.

## Revisions

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Description** | **Author** |
| 0.1 | 2015-02-23 | First Draft | Kristina Lid |
| 0.2 | 2015-04-29 | Review | Martin Rydman |
| 0.3 | 2015-12-04 | Main purpose of this revision: To move Services, Responsibilities, Mandate, and Delimitations from Integration Strategy to this document.  Other revisions also made | Martin Rydman |

## Referenced Documents

|  |  |  |
| --- | --- | --- |
| **Nr** | **Document name** | **Issued by** |
| Ref 1 | Reference Architecture |  |

## Abbreviations

|  |  |
| --- | --- |
| **Abbreviation** | **Description** |
| ICC | Information Competence Center |
| LOB | Line of Business |
| EA | Enterprise Architecture |
| ISMM | Integration/Information Solution Maintenance Management |
| IPMM | Integration/Information Platform Maintenance Management |

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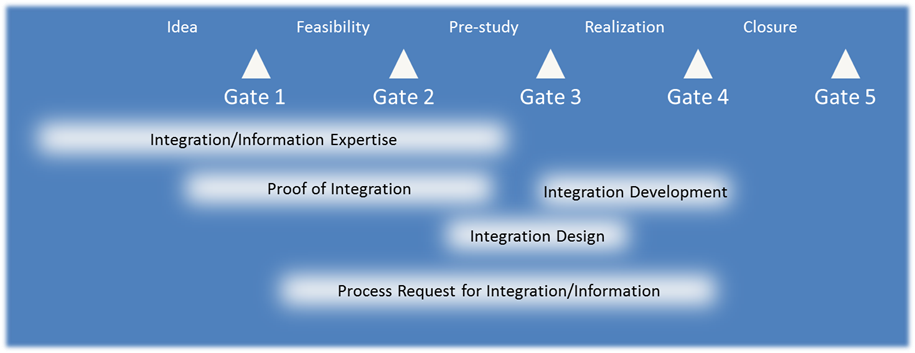
# Services, Responsibilities, Mandate and Delimitations

## Services

The ICC will provide a number of services to <Customer>. Below the role of **Client** is used for any party that requests an IT Solution **requiring Information exchange between applications within <Customer> or between <Customer> and external parties**. This kind of IT-solution will be referred to as an **Integration**.

### Services related to client project tollgates

<Customer> uses the project model shown below. The ICC will provide a number of services clearly linked to different phases of this model to add value to the client project from an integration perspective in the different phases



#### Integration/Information Expertise

Clients can (and should) contact the ICC in the early phases to get strategic advice on integration issues. The ICC shall maintain expertise in

* Information architecture and modelling
* Process modelling
* Integration solution architecture and design

#### Process Request for Integration/Information

The ICC is the single point of contact for alla requests for IT-solutions involving Integration/Information.

#### Proof of Integration

To support Clients that are unable to supply complete and accurate requirements, the ICC provides Proof of Integration solutions. These solutions are not subject to the policies and checkpoints that are mandatory for an integration solution designed for production.

#### Integration Design

The ICC is responsible for the design of all integration solutions at <Customer>.

#### Integration Development

The ICC is responisble for the development of all integration solutions at <Customer>

### Other Services

#### Information Architecture and Information Model Maintenance

The ICC provides expertise in methods and tooling for Information Architecture and Information Models, as well as maintains the tooling.

#### Master of Master Data

The ICC maintains and provides the information about what systems(s) provide what Master Data.

#### Information Service Catalogue

The ICC maintains the tools and management of an enterprise-wide Service Catalogue of all Information Services. In this context, an Information Service is an IT-artifact providing information retrieval/manipulation functionality over standardized protocols using standardized message formats in accordance with Ref. 1.

#### ICC SLA Compliance Reports and KPI’s

The ICC provides statistics and reports that visualize how the ICC delivers its services in relation to defined SLAs (if applicable).

#### Training

The ICC offers training in information/integration issues and the ICC’s services to <Customer>.

#### Procurement support

When projects and programs consider procuring IT-solutions from external vendors, the ICC can (and should) be consulted to provide evaluation, support and guidance formulating requirements in the integration area.

## Responsibilities

The ICC is responsible for:

* Delivering the services described in section 2.1. For certain services, SLA’s are defined, and in these cases the ICC is responsible for meeting these.
* Defining, developing and maintaining the Reference Architecture for Integration
* Meeting relevant Quality Attributes for integration solutions

## Delimitations

Listed below are a number of limitations of the ICC’s responsibility:

* The parts of an integration concerning how Sending and Receiving Systems according to Point of Delivery definition
* Information quality – responsibility only for what is defined in the contract

## Mandates

The ICC has the mandate to:

* Make decisions about what data sources to be used (in dialogue with Domain Architects, Application Owners, etc.).
* Approve/reject technical solutions in accordance with Ref 1.
* Approve/reject Information Requests.
* Formulate requirements to suppliers of systems regarding systems integration capabilities

Clear escalation path should be defined for all decision points.

# Functional Areas

The figure below shows the functions that the ICC shall have control over in order to execute the ICC Processes and provide the services described in the Integration Strategy. It also shows the related stakeholders that the ICC needs to interact with. These are shown as a dashed outline in the picture.

The ICC Process governs:

* How demands for Information from **Business** enters the ICC and are managed and designed by **ICC Management**
* How demands for Information are optionally routed to one or more **Master Data Providers** when changes in <Customer> Information Architecture are required
* How Information/Integration solutions are manufactured in the **Delivery** function
* How Information/Integration solutions are verified, deployed and supported by **Operations**

## Business

The ICC exists for the benefit of the Business that provides business value to <Customer>. In this context, the Business represents all aspects of <Customer> which need IT-solutions that require exchange of information between applications within <Customer> or between <Customer> and external parties. The ICC is the Business’s Single Point of Contact regarding all such needs.

## Governance

The Governance function will have strategic responsibility for the ICC.

### Strategic solution compliance

**Responsible:** Lead Architect **Accountable**: ICC Manager

Maintain and uphold the Integration Strategy, Reference Architecture and all dependent artifacts.

#### Activities

* Review, provide guidance on and approve all integration requests
* Keep track of and manage technical debt
* Revise and evolve artifacts as new demands are placed on the required capabilities

### Strategic process compliance

**Responsible and** **Accountable**: ICC Manager

Continuous improvement of the ICC processes by fact based management.

#### Activities

**Measure Work in Progress** ensures that needed reports are available and analyzed to support continuous improvement of the processes and intellectual capital. Typical KPI’s are: Time from start to end, Time in analysis and design phase, Time in delivery phase, Time in “hold” status, Quality issues after deploy, Number of scope changes, Number of review rejections etc.

**Perform Continuous Improvements** is typically ensuring that there is time allocated on all levels to be able to perform retrospectives and to update processes and intellectual capital with found improvements. Although this should be made during the entire process by all ICC resources, the main players in both performing and spreading the culture are the ICC Manager, Demand Manager and ICC Lead Architect.

## ICC Management

The ICC management function will have the operational responsibility for the ICC. The operational responsibilities are divided into three parts: Demand Management, Competence Management and Communication.

### Demand Management

**Responsible:** Demand Manager, **Accountable**: ICC Manager

Demand Management is about ensuring that <Customer> demand is managed in an efficient and qualitative fashion. The aim is to ensure that customers receive the outcome of their requests within expected time, with expected quality and price – all the while ensuring optimal resource utilization.

To be able to achieve good demand management the Demand Manager needs to have an ICC Process Workflow tool with the capability to give the total status of a specific ICC Request item as well as all ongoing requests. Typically an ICC Request should give the status of the specific request as well as being the entry point to reach all information around the specific request of both technical and project management type. This ensures that anybody can get the actual status of a request, a request can easily be restarted after a hold without losing any information or time and also reports can be retrieved from the entire Process workflow tool. To retain visibility it is important that all ICC members keep their ICC request updated always.

#### Activities

**Monitor prospects** typically includes probing business to get early heads up for activities in the future and proactively planning to meet future needs.

**Manage ICC Requests** deals with keeping the ICC plan and prioritization up to date when receiving new and changed demands into the ICC. Depending on the categorization of the ICC Request it should be entered to different backlog queues e.g. for Analysis or alternatively directly for Delivery.

**Capacity and Demand Management** is typically ensuring that work in progress and available work force are in balance. To be able to achieve good capacity and demand management each ICC team member must ensure to update their part of progress and status – the ICC Request should always show at what status it resides and available work trackers should be kept up to date. The Demand Manager should be able to get the current status from relevant lists and reports.

**Monitor and Drive work in Progress** ensures that work is progressing according to plan and supports in solving any concerns or showstoppers. The Demand Manager needs to have reoccurring status meetings with Integration Project Leads to get current status and be able to give ample support when needed. The different Integration Project Leads need to escalate to the Demand Manager whenever there exists showstoppers or other concerns in their deliveries.

### Competence Management

**Responsible**: ICC Lead Architect**, Accountable:** ICC Manager

Competence management is about building the ICC team and ensuring that all members of the ICC team speak with the same tongue and work efficiently according to the same processes. All ICC members should be committed to the ICC ways of working and have the same ICC tool-box which is used it in the same way. This is achieved by ensuring that a structured and lean on-boarding routine is in place, that processes, structural capital and intellectual capital is available, complete, correct and followed.

To ensure continuous improvement information should not only be easily accessible it should also be easy to update to ensure that the ICC environment is a living environment.

Knowledge sharing should be consciously controlled and continuously ongoing. For example recent changes and news should be shared in competence meetings, giving extra sessions on parts where problems have been found and extra learning is needed. Ensure that there is an openness and joint ICC responsibility to achieve knowledge sharing.

### Communication

**Responsible and Accountable**: ICC Manager

The communication part of ICC management is spreading the ICC gospel to the rest of <Customer> so that <Customer> management, the business, the application teams, project managers, etc. sees ICC as the natural integration partner and the integration specialist that removes integration complexity from the projects and applications.

A vital part is to give visibility on how to get support from ICC: how to place a request and what is needed to be provided to ICC to achieve a good delivery to the business.

An additional part of ICC communication is to ensure that ICC response time is quick and correct on all levels to avoid any perceived or real showstoppers or delays.

## Delivery

**Responsible** and **Accountable**: Integration Delivery Service (IDS) Manager

Delivery is the ICC function that builds a solution (based on an integration solution design) which is deployed to the Integration Platform (if approved by Operations).

## Operations

**Responsible** and **Accountable**: Service Delivery Manager

Operations is the ICC function which takes care of the run-time environment, i.e. Integration Solution Maintenance and Management (ISMM) and Integration Platform Maintenance and Management (IPMM).[[1]](#footnote-1)

## Master Data Provider(s)

A Master Data Provider is the team which manages Master Data for a specific business domain (such as R&D or Sales). Master Data teams will typically be working close to the ICC with information and Master Data Management (MDM) solutions.

# Baseline Framework

**Baseline**

Integration

Repository



Demand

Requirements

Analysis & Design



Concept

Model

Retrospective

Knowledge Base



Naming

Conventions

Build & Unit Test



Developers

Handbook

Populate   
objects

Analyze   
existing   
solutions

Check lessons learned



Patterns



Automation

Update intellectual capital



Integration Strategy



Guidelines

System and UA Test



QA Review

Checklist

Update intellectual capital

Operation

Templates



Delivery

Specification

Package



Reference/Information  
Architecture



Delivery

Specification

Checklist

Integration

Package

Integration

Package

The Baseline framework according to the above picture needs to be customized to fit <Customer> requirements. The basic parts specified above need to be put in place as living material. The most important for all parts of the ICC work is that the framework, processes and intellectual capital etc. must be:

* Easily accessible and available
* Owned and committed to, by all
* Constantly monitored and improved
* Adhered to, by all

# Information Architecture Overview

In order to address the MDM challenges, a layered Information Architecture is used to clarify the different levels of metadata that need to be managed, where the different artifacts produced reside, and which roles work on the different levels. All roles are described in detail in section 5 List of Roles.



## Business Layer

In this layer, the primary artifact is the Business Dictionary. The Business Dictionary is a list of Entities and their Attributes, and the purpose is to reach a <Customer>-wide common understanding of what certain phenomena mean. A commonly agreed-upon terminology helps you avoid two wide-spread problems in heterogeneous, silo organizations that drive cost and risk in most integration projects:

* The same phenomenon is called different things (is it an Item or an Article or a Product?)
* The same term is applied to different phenomena (when you say <Customer> you mean a prospect, but I interpret it as a party we’ve already billed)

A Business Dictionary is centrally published and maintained by the ICC, but the responsibility for its structure and definition lies with the Entity Owner.

In the Business Layer, the actual data that is contained within the structures laid out by the Information Architect is maintained by Data Owners (as part of their day-to-day work with the applications containing the data).

## Information Layer

In this layer, the Entity Author and Domain Architect maintain the metadata structures that constitute the core of the Information Architecture. The Entities and their relationships with each other are maintained in UML diagrams (or similar) in a central repository managed by the ICC. Terms are published to the Business Dictionary in the Business Layer and OAGIS schemas (or similar) are published to the Service Layer.

## Service Layer

In the Service layer, runtime artefacts are produced by Entity Authors and Solution Architects based on the UML model maintained in the Information Layer. The artefacts are:

* A Canonical Data Model (preferably expressed as standardized XML schemas)
* Entity Services (expressed as Service endpoints compliant with Information Services requirements and policies in the Reference Architecture for Integration)

## Integration Layer

In this layer Solution Architects and Integration Developers create the service implementations that realize the Service endpoints in accordance with the Reference Architecture for Integration.

## Data Layer

In this layer Master Data Providers (as defined in the Reference Architecture for Integration) provide master data of a predefined quality. The exact way this is implemented is the responsibility of the Domain Architect, and the way data quality is measured is the responsibility of the Data Steward.

# ICC Artefacts

The ICC maintains a set of artefacts to support the ICC Processes. These are described briefly below. They are grouped into different types as described in the table below. The main tools required are also described below.

## Definition

|  |  |
| --- | --- |
| Type | Description |
| Template | The basis for an information set (e.g. in a Word/Excel document, an online form filled out in some kind of application or a defined zip file structure) that is maintained for each instance of the ICC Process |
| Metadata | Centrally managed and maintained sets of data about Entities, Services, Integration Solutions etc. |
| Reference | Policies, guidelines and the like that set out patterns, rules etc. to govern how certain tasks and decisions should be carried out |
| Tool | A set of IT-resources to automate tasks that would otherwise be carried out manually |

## Artifacts

|  |  |  |
| --- | --- | --- |
| Artefact | Type | Description |
| Integration Strategy | Reference | A document describing the Vision, Goals, Services, Responsibilities, Mandates and Tools governing how Information/Integration solutions are to be built and maintained at <Customer>. |
| ICC Request Process | Reference | The Request process is described further in chapter 7 in this document |
| ICC Delivery Process | Reference | The Delivery process is described further in chapter 7 in this document |
| ICC Process Workflow | Tool | The ICC Processes need to be automated in a workflow engine, to ensure process execution compliance and allow for follow-up. |
| Reference Architecture for Integration | Reference | A complete map of all the technical capabilities that the ICC is responsible for, what technologies are to be used to provide these capabilities, and what patterns, policies and guidelines apply when building Information/ Integration solutions. Divided in Functional, Conceptual and Implementation Views, the latter. |
| Information Architecture | Reference | A complete map of <Customer>’s Information Entities |
| ICC Request | Template | An ICC Process flow item. The primary placeholder for the demand. The ICC Request will exist in different flavors depending on type of demand (new, change, maintenance, emergency). Will link to relevant information such as the Information Request. Can result in one or many information/integration flows.  An ICC request can also about other needs, such as strategic and architectural support resources. |
| Information Request | Template | The template which ensures that the business requirement and technical information about the integration/information demand is documented in a structured way to allow easy and consistent governance.  The Information request contains:   * The Business objectives * Business process which is impacted * Information requirements * Information entities with classification * Master data information * Information and System owner approval * A high-level solution * Nonfunctional requirements |
| Patterns Catalog | Reference | A set of pre-defined integration patterns and how to realize them within the boundaries of the Reference Architecture |
| MDM Policy | Reference | The MDM policy is comprised of   * The |
| Concept Model | Reference | Defines the main building blocks of an Integration solution and is the foundation of:   * The Naming Conventions * The Documentation Repository data model * The Event Metadata Specification |
| Naming Conventions | Reference | Comprehensive guidelines describing how all the components of an integration solution shall be named, from objects in the Documentation Repository, via source code and scripts, right down to the infrastructure level, such as queues in a MOM (Message Oriented Middleware) |
| Implementation Drawing | Template | A drawing (Landscape) used to document implementation details. Templates should exist for all major technologies defined in the Reference Architecture for Integration. |
| Estimate Model | Tool | An Excel model that captures all aspects of the Integration Development and Integration Release & Deploy processes, including admin/innovation surcharges. Example iCat and RET. |
| Delivery Specification Checklist | Template | A checklist ensuring that the delivery package in complete before turning over to delivery in realization process |
| Delivery Specification Package | Template | A technology specific structure stipulating all required information to build an integration solution. |
| QA Review Checklist | Template | A checklist used at the handover from Delivery to Operations. Ensures that all solutions to be deployed comply with a set of minimum requirements. |
| Integration Package | Template | A technology-specific structure stipulating all the required artefacts of an Integration solution, and how and where they are stored. An integration package is deployed to different environments |
| Emergency Integration Package | Template | A subset of an Integration Package, minimized to ensure rapid processing |
| Emergency Change Backlog | Template | A template that contains the backlog resulting from Emergency Changes. |
| Documentation Repository | Metadata | Web application (Baseline Integration Portal) that contains all metadata about Services and Integration Solutions |
| Integration Specification | Template | Specification with the detailed design for the integration |
| Technical Debt | Template | Technical debt document contains information about what technical debt an integration has introduced. The technical debt document is typically linked to the ICC request and the ICC Process flow tool enables to retrieve all ICC Requests with technical debt. |
| Business Dictionary | Metadata | A dictionary listing Business Entities and their attributes, aimed at LOB, primarily Entity Owners and Domain Architects |
| Entity Structure | Metadata | A UML-model comprising <Customer> Information Architecture (i.e. all Entities and Attributes under Master Data Governance) |
| Event Metadata Specification | Reference | A specification describing how Integration solutions shall log information about the files, messages etc. that are being processed |
| Build & Deploy | Tool | Tools to automate the building and deployment of Integration Packages |
| Test | Tool | Tools to automate unit- and regression testing of Integration Solutions |

## Main Tools

Tool support facilitates the ICC work. The major need for tool support exists within three different ICC areas:

* A Process flow tool to give
  + Process visibility
  + Resource Utilization
  + Reporting functionality
  + ICC Request container
* A Knowledge and documentation framework to give
  + Structured storage
  + Easy accessibility
  + Easy to maintain and keep living
* An Integration Repository to give
  + Visibility in one tool for all integrations regardless of technology
  + Easy access and overview of all information flows with their documentation
  + Support for both run-time and design time visibility of <Customer> integration architecture

### Process workflow tool

A process workflow tool needs to achieve the following functionality:

Process visibility needs to give the overview of the entire ICC delivery. Where each demand is in the process and what resource utilization exists for the specific member as well as the capacity of the entire team. Each ICC request needs to be a container for the demand having or linking to information that specifies and gives traceability of the ICC request on all levels. Important rule of thumb is not to duplicate information in the ICC request the ICC request should instead link to the master of the specific information.

The process flow tool needs to have reporting capability to ensure that the ICC delivery can be steered and continuously improved.

Reports should be added as the service matures and the need occurs. Below is suggestion on possible KPI’s.

* Number of ICC requests in different phases (New, A&D, Delivery, Test, Hold, Closed, etc)
* Delivery Accuracy (# requests delivered in promised time at agreed cost)
* Time from start to end
* Time in analysis & design phase
* Time in delivery phase
* Time progressed in “hold” status
* Quality issues after deploy
* Number of scope changes
* Integration Board review result
* Number of QA review rejections
* etc.

Enfo recommends a Jira implementation of a Process workflow tool.

### Knowledge and documentation framework

All ICC Artifacts such as Reference Architecture, Integration Strategy, Naming Conventions, Concept Model, Policy, Patterns, Templates, Developers Handbook, Checklists, Guidelines, “how-to’s” etc. should be stored in an easy to reach structure.

The storage per type, i.e. Governance, Guidelines etc. should be unambiguous and “one-click-away”.

To ensure continuous improvement and living environment the entire ICC community should take ownership of the material and use it and adhere to it. The documentation which is not of governance type should be easy to update with the ICC culture that documentation should be continuously improved to keep the environment living and useful. For the governance documentation ICC management should ensure that the documentation is updated with suitable frequency as the service matures and evolves.

Enfo recommends that as a first step, that the knowledge framework solution is built on the existing <Customer> solution including wiki-based functionality, for example SharePoint.

### Integration Repository

Integration Repository is used to get an overview of all integrations in <Customer> irrespectively of technology. It can be used to view what Services an application consumes and provides, what information flows in the integrations and links to the documentation for the integration flows.

Enfo recommends the Baseline Integration Portal as the Integration Repository to have a tool that is fully integrated to with the ICC.

# ICC Roles, Meetings and Decision Bodies

To execute the ICC Process, a number of roles, decision bodies and meetings are required. These roles are positioned in the ICC functions in the following illustration and briefly described below. Roles in light blue are roles outside the ICC, roles in dark blue are inside the ICC. Some roles are named in plural. This means that in order to scale as the number of requests to the ICC grows, these roles may need to be duplicated. Also worth noting is that one person can fulfill more than one role. It is, however, important that the ICC manager works proactively to ensure that sufficient resources are allocated to deliver the required services with adequate speed and accuracy.

**IDS Manager**

**Entity Authors**

**Integration Developers**

**Enterprise Architect**



**Domain Architects**



**Entity Owners**



**Requirement Owners**



**Business Architects**



**ICC Manager**



**ICC Lead Architect**



**Demand Manager**



**Solution Architects**



**Integration Project Leads**



**IDS Manager**



**Service Delivery Manager**



**Infrastructure Architects**



**Support Technician**



## Description of Roles

As previously stated the ICC with its roles needs to be tailored to fit <Customer> size and ICC maturity. The recommendation is to start small and add roles and head count as the ICC grows and matures.

| Role | Resides in | Description |
| --- | --- | --- |
| ICC Manager | ICC | Has the overall responsibility to ensure that the required funds and resources to deliver the ICC services listed in the Integration Strategy are available.  Is accountable for ICC to reach the Strategic Objectives set out in the Integration Strategy.  Is accountable for the ICC deliveries and manages the ICC work.  Is accountable for maintaining the ICC Artefacts and ICC Processes. |
| ICC Lead Architect | ICC | Responsible for the architecture delivered by the ICC.  Responsible for the ICC Artifacts within the architecture domain.  Responsible for ensuring that competence sharing is consciously controlled  Responsible for that the intellectual capital is continuously maintained and shared. |
| Demand Manager | ICC | Is the Single Point of Contact between the ICC and LOB.  Receives, categorizes and monitors Requests for Information.  Coordinates the ICC’s resources to deliver the ICC services listed in the Integration Strategy |
| Solution Architects | ICC | Translates business requirements into technical requirements.  Designs the solutions delivered by the ICC according to ICC Governance |
| Integration Project Leads | ICC | The Integration Project Leads has the end-to-end responsibility for their assigned ICC request from demand to deploy.  Will coordinate the ICC’s resources and the ICC Process within the IT project for the assigned ICC Request. |
| Integration Developers | ICC | Develops integration solutions.  Performs problem management.  Supports the project during User Acceptance test. |
| Integration Delivery Service Manager | ICC | Responsible for the IDS delivery |
| Support Technicians | ICC | Deploys integration solutions in the designated environments.  Performs incident management and escalates problems.  Performs activities arising from Application Management needs in relation to software appointed by the Reference Architecture for Integration. |
| Service Delivery Manager | ICC | Accountable for the ICC Operations |
| Entity Author | ICC | Is responsible for maintaining the various metadata structures on behalf of Entity Owners. |
| Requirement Owner | LOB | Any LOB representative that requests an IT solution involving information exchange |
| Business Architect | LOB | Any LOB architect that takes responsibility for the architecture for the entire solution which the ICC solution is part of. |
| Entity Owner | LOB | Is responsible for one or more Business Entities in terms of   * Definitions and attributes * Usage |
| Enterprise Architect | Corporate IT | Connecting ICC Architecture artifacts as Reference Architecture, Integration Strategy with <Customer> artifacts.  Ensuring that the ICC ways of working is anchored and spread within <Customer>. |
| Domain Architect | Corporate IT | Domain Architect needs to ensure that the integration/information solutions within the domain follow the domain guidelines. |

## Description of Decision Bodies and Meetings

A number of meetings are needed to be in place to drive the Integration deliveries and ICC successfully. Varying over time and depending of maturity of the ICC there will be different need for formal re-occurring meetings. The frequency of the reoccurring meetings will depend on the workload and size of the ICC and must be decided case by case.

We have below noted the most important meeting bodies with purpose and description. Additionally the attendees and drivers of the different meetings will vary depending on the size of the ICC, staffing of ICC and number of requests which are simultaneously in the different process steps.

Where applicable the decision gate which the meeting mandates is written in the meeting table.

### ICC Management Team

|  |  |
| --- | --- |
| **Meeting** | **ICC Management Team** |
| **Description** | ICC Management Team pursues the strategic and tactical development of the ICC. Ensures that ICC moves towards the vision and goals of the ICC. |
| **Chairman** | ICC Manager |
| **Attendees** | ICC Lead Architect, IDS Manager, Service Delivery Manager, Demand Manager |
| **Mandate** | Governance body for the entire ICC |
| **Agenda** | * Report on relevant KPI’s * Setting of the agenda for next ICC Competence meeting * Specific agenda for each meeting depending on concerns, issues and focus areas. Suggested by attendees but managed by chairman |
| **Frequency** | Bi-weekly |

### Information/Integration Board

|  |  |
| --- | --- |
| **Meeting** | **Information/Integration Board** |
| **Description** | Information/Integration Board is a reoccurring governance meeting mainly responsible for approving the Information Requests. The Integration Project Lead is responsible for allocating a time slot on a specific Information Board. The material to be reviewed needs to be available for review four days prior to the allocated review slot.  Information board should typically be represented by Architects and Operation resources to ensure that decision can be made with all perspectives. The information board is responsible for making conscious decisions about both strategic information/integration issues and individual information/integration projects. Conscious decision means that the ICC always strives to build   * The **right** **integration** * In the **right way**   **The Right integration** means that integration solutions shall take into account strategies regarding   * Master Data * Information Models * Service Orientation * Reuse   **The right way** means that integration solutions shall comply with the Reference Architecture for Integration.  Another way of expressing the Information Board's responsibility is that it should strive to minimize the build-up of Technical debt in the Information Architecture and the Integration Platform. Technical debt is incurred when you refrain from certain work today (to save money and / or time), but by this saving postpone an equivalent (or often greater) workload / cost to a later date. Technical debt tends to suddenly reach a critical threshold, and you are then forced, often at great expense and with significant disruption to the business, to "pay back" the Technical debt.  The Information Board shall document incurred Technical Debt as part of its everyday decision making.  The approval of the Information Requests ensures that the right integrations are built in the right way.  Information Board will typically also support the ICC Manger with findings from the reviews to aid fulfilling the Strategic Objectives set out in the Integration Strategy |
| **Chairman** | ICC Lead Architect |
| **Attendees** | Integration Project Leads, Operations Infrastructure Architect, ICC Manager  Additional by invitation when needed: Entity Owners, <Customer> Architects, Domain Architects |
| **Mandate** | Approve or Reject Integration Request |
| **Agenda** | For each ICC Request to be reviewed the following should be performed:   * Comments on Integration Request * Comments on the suggested time plan * Decision   + Ok, Ok with comments, Not ok * Technical debt document if approved though not complying |
| **Frequency** | Weekly meeting |

### ICC Work Progress

|  |  |
| --- | --- |
| **Meeting** | **Work Progress** |
| **Description** | Meeting to ensure that the ICC deliveries are progressing according to expectations, putting high-light on potential issues or show stoppers, enabling the Demand Manager to have control over the deliveries performed.  Depending on the ICC’s methods or tools for driving the organization the meeting can be managed differently.  Suggested approach is visualize the progress through a Kanban view. |
| **Chairman** | Demand Manager |
| **Attendees** | Integration Project Leads |
| **Mandate** | Prioritization of work and resources |
| **Agenda** | * High-lighting any ICC requests not progressing according to plan and set action to get back on track |
| **Frequency** | Weekly |

### IDS meeting

|  |  |
| --- | --- |
| **Meeting** | **IDS meeting** |
| **Description** | Collaboration meeting between ICC manager and IDS manager aiming for correct delivery capacity from IDS, ensuring continuous improvement of the delivery as well as highlighting any concerns. |
| **Chairman** | ICC Manager |
| **Attendees** | IDS Manager Demand Manager |
| **Mandate** |  |
| **Agenda** | * Reporting on delivery KPI’s * Heads up on future demands * Agreement on needed actions |
| **Frequency** | Monthly |

### Operations meeting

|  |  |
| --- | --- |
| **Meeting** | **Operations meeting** |
| **Description** | Collaboration meeting between Customers Service Manager (ICC Manager) and Service Delivery Manager .  Monthly operative meeting, reporting  Quarterly strategic meeting |
| **Chairman** | ICC Manager (Service Manager) |
| **Attendees** | Monthly: Service Delivery Manager, Tech Lead on demand  Quarterly: CIO (if needed), Key Account Manager, Service Delivery Manager, Member of Management team (if needed) |
| **Mandate** |  |
| **Agenda** | Monthly:   * Reporting on op & maintenance KPI’s * Agreement on needed actions * Invoice   Quarterly   * Agreement review * Prio 1 reporting * Future strategy * Overall business direction |
| **Frequency** | Monthly, Quarterly |

### ICC Competence meeting

|  |  |
| --- | --- |
| **Meeting** | **ICC Competence meeting** |
| **Description** | Meeting for building ICC Team competence. Used to share competence, inform team regarding news within ICC and handle competence advancement within specific problem areas. |
| **Chairman** | ICC Lead Architect |
| **Attendees** | ICC Team members |
| **Mandate** |  |
| **Agenda** | * Specific agenda set on ICC Board Meeting |
| **Frequency** | Bi-weekly |

### Knowledge hand-over meeting

|  |  |
| --- | --- |
| **Meeting** | **Knowledge hand-over to delivery** |
| **Description** | The Knowledge hand-over meeting is the Integration Project Lead’s formal handover meeting with the ICC developers to hand-over requirements, solution design, time plan, estimates and expectations. Typically the Solution Architect takes a big part in the hand-over |
| **Chairman** | Integration Project Lead |
| **Attendees** | Solution Architect, Integration Developer(s) |
| **Mandate** |  |
| **Agenda** | * Walkthrough of Requirements * Walkthrough of High Level Solution * Walkthrough of time plan, estimates and expectations * Reverse knowledge transfer, i.e. in own words from receiver what expectations are understood regarding, scope timings and estimates. * Commitment and agreement of time plan, estimates and expectations |
| **Frequency** | At start-up of the solution delivery |

### Delivery Status meeting

|  |  |
| --- | --- |
| **Meeting** | **Delivery status meeting** |
| **Description** | The delivery status meeting is the meeting where Integration Project Lead monitors/drives progress of the solution delivery, enables the Integration developer to get help up for any concerns or issues. |
| **Chairman** | Integration Project Lead |
| **Attendees** | Integration Developer(s) |
| **Mandate** |  |
| **Agenda** | * Short status on ongoing activities * Action on any issues or concerns |
| **Frequency** | The need and frequency needs to be decided depending on size of the ICC Request. |

### QA Review meeting

|  |  |
| --- | --- |
| **Meeting** | **QA Review meeting** |
| **Description** | Review of solution and operation readiness. |
| **Chairman** | Integration Project Lead |
| **Attendees** | Service Delivery Manager or by him appointed |
| **Mandate** | Accept or Decline deployment |
| **Agenda** | * Review of solution and artifacts * Decision |
| **Frequency** | At request. |

# ICC Processes

## Overview



### Input / Output

|  |  |  |
| --- | --- | --- |
| **Input / Output** | **Object** | **Description** |
| **Input** | Information Demand - ICC Request | Request for information |
| **Output** | Integration Package, deployed in Production | A tested and approved integration solution deployed in the production environment |
| **Output** | Integration artifacts | Approved design, support and maintenance artifacts |
| **Output** | Revised Artefacts | As a result of the Lesson Learned sub process, any number of the ICC Artefacts or processes may be updated |

### Activities/Sub processes

| **Activity/Sub process** | **Description** | **Artefacts** |
| --- | --- | --- |
| **Classify Request**  *(Role: Delivery Manager)* | Classify incoming request into one of:   * **Standard Change**:  any request that is not qualified as one of the two other options below * **Pre-approved Change**:  a request that does not need to be approved from a business and/or technical perspective * **Emergency Change**:  a request originating from an incident that affects the production environment and that needs immediate resolution | * ICC Request * Information Request |
| **Information Request** | Information requirements are processed with respect to master data, classification, operational and technical aspects | * Information Request |
| **Analyze & Design** | All requirements are collected and the solution high level designed | * Information Request |
| **Integration Development** | The approved solutions are detailed designed, documented, developed, tested and packaged | * Integration Package |
| **Integration Release and Deploy** | Packaged solutions are deployed in different environments, and acceptance testing is performed | * Integration Package |
| **Pre-approved Change** | The solutions are designed, documented, developed, tested and packaged | * ICC Request |
| **Emergency Change** | The solutions are developed, tested and packaged, and a backlog is created to ensure documentation compliance | * ICC Request * Emergency Integration Package * Emergency Change Backlog |
| **Retrospective** | The integration project is reviewed, and the ICC Artefacts are updated if deemed necessary | * All artefacts listed in chapter 4 List of ICC Artefacts are subject to revision and change |

## Sub process – Request Process (Standard Change)



### Document Information/Integration Requirements

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Solution Architect | Integration Project Lead | Entity Author, Entity Owner | | Requirement Owner, Demand Manager |
| **Pre-requisite** | ICC Request categorized for Standard Change. Integration Project Lead and Solution Architect Assigned | | | |
| **Actions** | Information from stakeholders is gathered and documented to understand **what** to do and **why** to do it, with a clear focus on Information, Master Data and Business Process.  Ensuring approval and commitment from all involved parties (involved applications and information owners)   * Complete the Business Part of the Information Request in cooperation with the Solution Architect * Perform high-level estimates and planning | | | |
| **Output** | Information Request Business part | | | |
| **Artefacts** | Estimation model (RET) | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  |  | |  | |

### Entity Change Process

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Entity Owner | Entity Owner | Entity Author | | Integration Project Lead  Demand Manager |
| **Pre-requisite** | Entity Change required | | | |
| **Actions** | The entity change is evaluated from an information and master data perspective.  The need is managed, documented and initiated, alternatively the change request is rejected.  If the change is rejected this should be documented to be included in the Technical Debt if anyway approved. | | | |
| **Output** | Managed Entity Change | | | |
| **Artefacts** | MDM Policy | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  | Approved of Rejected entity change | | Information Owner | |

### Business Decision

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Integration Project Lead | Information Board | ICC Lead Architect, Entity Owner, Domain Architect, <Customer> Architect | | Requirement Owner, Demand Manager |
| **Pre-requisite** | Business part of the Information request filled in. Entity change is evaluated | | | |
| **Actions** | A decision is taken if the proposed integration should be developed “Are we building the right Integration?” “Are we using the right information?” “Are we taking the information from right source?” “Are involved system and information owners agreeing? “Is the Entity Change evaluation included in decision?”  If the change for any reason is not valid, and still is being approved, this should be documented in Technical Debt | | | |
| **Output** | Information Request Business part approved or rejected if applicable Technical Debt | | | |
| **Artefacts** |  | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
| **Integration Board** | Go-Go with Comments- No Go | |  | |

### Document & Design Information/Integration Solution Proposal

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Solution Architect | Integration Project Lead | ICC Lead Architect | | Requirement Owner, Demand Manager |
| **Pre-requisite** | Business part of the Information request approved | | | |
| **Actions** | Analyze, design and documentation of the high-level technical proposed solution in the Solution part of the Information Request.  The design of the solution is made in terms of the Concept Model, Reference Architecture, Best Practices and Guidelines.  Populate the Integration Repository accordingly.  Perform informal peer-review of the solution | | | |
| **Output** | Information Request Business solution part filled in. | | | |
| **Artefacts** | Reference Architecture, Best Practices, Guidelines, Naming Conventions, Patterns, Catalog | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  |  | |  | |

### Solution Decision

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Integration Project Lead | Information Board | ICC Lead Architect | | Requirement Owner, Demand Manager |
| **Pre-requisite** | Solution part of the Information request filled in | | | |
| **Actions** | The Integration Project Lead is responsible for scheduling a review slot for the Solution Part of the Information request.  An approval is made on **how** the solution should be implemented (“Are we building the Integration in the right way?”). Items like reusability, patterns, framework compliance are checked.  If approval is made though non-complying the Technical debt should be documented. | | | |
| **Output** | Information Request Business solution approved. If applicable documented Technical debt. | | | |
| **Artefacts** |  | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  | Go-Go with Comments- No Go | | Information Board | |

### Create Estimate

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Integration Project Lead | Integration Project Lead | Integration Developer, IDC Manager | | Requirement Owner, Demand Manager |
| **Pre-requisite** | Solution part of the Information request approved | | | |
| **Actions** | Get estimate for the solution delivery using the estimation model and in complex cases confer with the delivery organization.  Compile a preliminary time plan with corresponding assumptions  Ask for approval to go-ahead from Requirement Owner. | | | |
| **Output** | Estimate and preliminary time plan | | | |
| **Artefacts** | Estimation Model (iCAT) | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  |  | |  | |

### Evaluate Estimate

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Requirement Owner | Requirement Owner | Integration Project Lead | | Demand Manager |
| **Pre-requisite** | Estimates and time plan received | | | |
| **Actions** | The estimate is evaluated. The only valid objection to an estimate is related to **cost**. The ICC has the authority to decide what technical solution to provide, and a rejected estimate will therefore result in that requirement owner needs to place a revised request for information to get the demand in place.. | | | |
| **Output** | Go-ahead or No-Go for Delivery | | | |
| **Artefacts** |  | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  | Estimates approved/rejected | | Requirement Owner | |

### Create Delivery Package

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Solution Architect | Integration Project Lead | Integration Developer, Requirement Owner, Business Architect | | Requirement Owner, Demand Manager |
| **Pre-requisite** | Approved and financed ICC Request delivery | | | |
| **Actions** | Ensure all needed information in place according to delivery specification checklist. I.e. Business mapping specifications, fire wall opening, accesses, ports…… | | | |
| **Output** | Delivery Package | | | |
| **Artefacts** |  | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  |  | |  | |

## Sub process – Entity Change



### Evaluate CR

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Entity Author | Entity Owner |  | | Integration Project Lead  Demand Manager |
| **Pre-requisite** | Entity Change required | | | |
| **Actions** | Evaluate if the proposed solution is valid from information architecture and master data perspective.  The Entity Owner(s) shall consult with affected Domain Architects in the evaluation | | | |
| **Output** | Approved or Rejected Entity Change | | | |
| **Artefacts** | MDM Policy | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  | Approved of Rejected entity change | | Information Owner | |

### Perform Change in Business Dictionary

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Entity Author | Entity Owner |  | | Integration Project Lead  Demand Manager |
| **Pre-requisite** | Entity Change approved | | | |
| **Actions** | TBD | | | |
| **Output** | Updated Business Dictionary | | | |
| **Artefacts** | MDM Policy | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  |  | |  | |

### Perform Change in Entity Structure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Entity Author | Entity Owner |  | | Integration Project Lead  Demand Manager |
| **Pre-requisite** | Business Dictionary is updated | | | |
| **Actions** | TBD | | | |
| **Output** | Updated Business Entity Structure | | | |
| **Artefacts** |  | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  |  | |  | |

### Perform Change in Entity Structure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Entity Author | Entity Owner |  | | Stakeholders,  Integration Project Lead  Demand Manager |
| **Pre-requisite** | Business Entity is updated | | | |
| **Actions** | TBD | | | |
| **Output** | Stakeholders are informed | | | |
| **Artefacts** |  | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  |  | |  | |

## Sub process – Request Process (Pre-approved Change)



### Document Integration Solution

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Integration Project Lead | Integration Project Lead | Integration Developer, ICC Lead Architect | | Requirement Owner, Demand Manager |
| **Pre-requisite** | ICC Request categorized for Pre-Approved Change. Integration Project Lead Assigned | | | |
| **Actions** | Create the delivery package with technical solution described. Since this is a pre-approved Change, it shall be based on one of the patterns in the Patterns Catalog | | | |
| **Output** | Delivery Package | | | |
| **Artefacts** | ICC Request, Patterns Catalogue | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  |  | |  | |

## Sub process – Request Process (Emergency Change)



### Develop, Test and Package

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Integration Developer | Integration Project Lead |  | | IDS Manager, Demand Manager |
| **Pre-requisite** | ICC Request categorized for Emergency Change | | | |
| **Actions** | An Emergency Change request originates from an incident that affects the production environment and that needs immediate resolution.  A problem resolution is built, unit and system tested. The tested resolution is deployed as an Emergency Deployment Package | | | |
| **Output** | Emergency Deployment Package | | | |
| **Artefacts** |  | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  |  | |  | |

### Develop, Test and Package

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Integration Developer | Integration Project Lead |  | | IDS Manager, Demand Manager |
| **Pre-requisite** | ICC Request categorized for Emergency Change | | | |
| **Actions** | The Emergency change backlog is created. The Emergence Change Backlog is a list of activities (typically related to documentation) that need to be completed before the ICC Request can be closed | | | |
| **Output** | Emergency Change Backlog | | | |
| **Artefacts** |  | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  |  | |  | |

## Sub process – Delivery



**Important note:** During the entire sub process, the **QA Review Checklist** shall be consulted. The QA Review Checklist contains all criteria that need to be fulfilled for an Integration Package to be approved in The QA Review.

### Start-up

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Integration Project Lead | IDS Manager | Solution Architect, Integration Developer | | Requirement Owner, ICC Manager |
| **Pre-requisite** | Approved and financed ICC Request, Delivery Package | | | |
| **Actions** | * Verify the Delivery Package * Verify estimates and time plan * Assign ICC Developer * Perform complete knowledge transfer to the delivery organization setting clear expectations of both content of delivery and time plan. Good practice is to use reverse knowledge transfer * Inform and agree any potential updates of estimates and time plan with ICC Manager | | | |
| **Output** | Agreed Estimates, time plan and scope. Performed knowledge transfer to Integration developer(s). | | | |
| **Artefacts** |  | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  | Agreed Scope, Estimates and time plan. | | IDS Manager, Integration Project Lead | |

### Detailed Design

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Integration Developer | Integration Project Lead | Solution Architect | | IDS Manager, Requirement Owner |
| **Pre-requisite** | Agreed Scope, Estimates and time plan | | | |
| **Actions** | Create and finalize required artifacts applying the guidelines, templates etc. needed.  Peer review the design, perform any changes the review incurs.  Verify against agreed solution, estimate, time plan and scope.  If applicable update estimates, time plans, scope. Communicate and agree any potential changes. | | | |
| **Output** | Complete, Reviewed and approved detailed design, Integration Specification | | | |
| **Artefacts** | Integration Package, Guidelines, Concept Model, Naming, Conventions, Patterns Catalog, Integration Specification, Documentation Repository | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  | Approved Peer review | | Integration Project Lead, Solution Architect or Peer Integration Developer whoever is appropriate | |

### Build, Test and Package

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Integration Developer | Integration Project Lead | Solution Architect System people from integrating systems | | IDS Manager, Requestor |
| **Pre-requisite** | Finalized and approved detailed design | | | |
| **Description** | Develop solution according to documented solution and guidelines.  Create needed artifacts. Unit, connectivity- and system- test the solution.  Prepare QA Review checklist, request QA Review and request QA deploy. | | | |
| **Output** | Performed Unit, Connectivity, System Tests. | | | |
| **Artefacts** | Test tool, QA Review checklist, Integration Package | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  | Approved QA review | | Service Delivery Manager | |

### Support user acceptance tests

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| Integration Project Lead | Integration Project Lead | Solution Architect, Integration Developer | | IDS Manager, Requirement Owner |
| **Pre-requisite** | QA deployment performed | | | |
| **Actions** | * Provide support User Acceptance test end-to-end * Provide Bug fixes | | | |
| **Output** | Performed and approved User Acceptance Tests | | | |
| **Artefacts** |  | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  | Approved UAT | | Requestor | |

### Deployment & Transition

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Responsible** | **Accountable** | **Consulted** | | **Informed** |
| ICC Developer | Solution Manager | Service Delivery Manager | | IDS Manager, Requestor, Product Manager |
| **Pre-requisite** | UAT approved | | | |
| **Actions** | * Created needed maintenance & operations artifacts * Production Review * Plan deployment * Deployment * Transition Approval | | | |
| **Output** | Deployed Solution | | | |
| **Artefacts** | Integration Package, Build & Deploy tool | | | |
| **Decision Point** | **Decision** | | **Decision Body** | |
|  | Transition Approval | | Requestor | |

1. ISMM and IPMM and support services offered by Enfo [↑](#footnote-ref-1)