

BaanDEM Tool 5.2
Enterprise Management

Difference Study

P3068A US



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About this document

Intended audience

This document is intended for people who want to get an overview of the differences between BaanDEM Tool 5.2 and BaanDEM Tool 5.1.

No detailed knowledge of the Baan software is needed to read this document. However, understanding the contents is easier if you are familiar with:

- The overall structure of packages, modules, and sessions within the Baan software
- The BaanDEM Tool 5.1 functionality

How to use this document

This difference study on the DEM is to help the Baan user to learn what is new in BaanDEM Tool 5.2 in comparison with the BaanDEM Tool 5.1.

Read Chapter 1, New concepts in DEM, if you want to have an overview of the new concepts used in DEM.

Read Chapter 2, Summary of changes to DEM, for a listing and brief explanation of the changed modules of DEM compared with Baan DEM Tool 5.1.

Read Chapter 3, New functionality in DEM, to learn more on the new and changed functionality in DEM.

Read Chapter 4, Procedures related to DEM, for information on the procedures related to DEM. In Chapter 4 you find the sequence in which you must carry out the sessions.

1. New concepts in the BaanDEM Tool

This chapter provides an overview on the new concepts in DEM.

1.1 Introduction

Within the BaanDEM Tool 5.2, there are two new concepts. One of them is the new organization model, which has changed considerably from the previous version. The other new concept is the modeling of components, which could be components other than Baan. There are several enhancements in functionality in the rest of the DEM Tool, but these will be explained in chapters 2 and 3.

1.2 The organization model

The organization model contains a representation of the employees and their roles in an enterprise. The organization model as a concept is not new, but the functionality has changed considerably. It no longer has the graphical interface representing departments and staff as in the previous versions. It has been replaced by an organization model, where employees, roles, Baan user DEM settings, employee groups and employee group types are defined. Within this concept, the organization modeling gives the customer the opportunity to model the enterprise from an organizational perspective.

In DEM 5.1, roles, employees, and the link between them was defined on business model level and not in repository. In the new organization model they are defined in repository.

The new functionality of the organization model improves the authorization of processes and activities for the dynamic menu browser. It allows the possibility to distinguish between distribution and authorization of processes and activities for workflow. It also allows extended scheduling possibilities within workflow.

1.3 Component modeling

The modeling of components other than the Baan component, is part of the Common Component Architecture (CCA) strategy. The objectives of this strategy are to facilitate decoupling of packages in BaanERP, and to facilitate integrations between packages in the Baan Web. Modeling of other components is not completely evolved, but the software of the DEM Tool 5.2 now has the structure to be able to handle it.

Within DEM, component modeling will enable the modeling of different components, which includes the different versions of Baan components and partner products. It will also enable the starting of activities from different Baan versions and partner components out of both the DEM Tool and workflow.

2. Summary of changes to the BaanDEM Tool

This chapter gives a summary of the changes in the modules of BaanDEM Tool 5.2 compared to BaanDEM Tool 5.1.

2.1 Changes in the organization Model

The organization model represents an enterprise, or parts of an enterprise from an organizational perspective to support the implementation, optimization and execution of Baan and partner products. In the organization model, employees, employee groups and roles can be defined. The organization model supports the settings of authorizations, distributes processes and makes it possible to schedule tasks in a workflow environment based on modeled characteristics.

The dynamic menu browser uses the definition of the organization model at run time to create an end user desktop.

Baan Workflow makes use of an export of the organization model for distribution, authorization and scheduling purposes.

2.1.1 Content of the organization model

The organization model is in the repository. It has no graphical user interface, except the model, employee and role browser. Within the organization model employees, roles, employee groups, employee group types and Baan user DEM settings need to be defined. The linking of role and employee, and linking the role to the process is now done in the repository, instead of in the business model.

The employee is version independent, the role is version dependent, and the link between role and employee is version dependent. This is to facilitate the re-use of employees, and to allow employees to have access to several project models, through the link to the role.

The employee group types and employee groups have no impact on configuring the end user interface with DEM. The use of employee groups and employee group types is for the distribution and authorization of processes and activities for workflow.

Baan user DEM settings contain some of the default settings used for the distribution of work through the dynamic menu browser.

2.2 Changes in the dynamic menu browser

The dynamic menu browser (DMB) is the end user interface, which is generated based on DEM models. It is called dynamic since it doesn't need a generation/ compilation run. Changes in processes, role assignments or other model items are directly incorporated in the menu browser, because it can read model and role information at run-time. The dynamic menu browser will contain the same functionality as was available in previous releases and is enhanced in the following main areas.

- Run time filtering of activity types. The user can decide to hide activities of a certain type, for example manual.
- It will be visible for the end user, if a process has been changed, based on a defined time interval, since the last login in.
- User defined settings are saved for the end user automatically.
- Since it is now possible to link a URL to an activity in the process, it is also possible for the end user to start an inter intranet page from the dynamic menu browser.

2.2.1 Changes in the process viewer

The process (PV) is a run-time tool which offers a graphical display of business processes to the end user. It displays the information of the dynamic menu browser graphically. The new PV has the same functionality as the PV used with the DEM Tool 5.1 (Grieg) plus a lot of new functionality.

From the dynamic menu browser (DMB) the user can start up the PV by selecting a business process in the browser and clicking the start icon. The startup of the PV is in combination with the DMB and is role and company dependent. This implies that activities, where a user does not have the appropriate role or authorization, results in different display of the activity.

The new PV is developed as a client application and has to be installed on each client. As a result graphical processing of data will now be handled on the client side, decreasing network traffic. The new PV also has the same look and feel as the EME editor.

From a Baan session, all business processes in which the session is used can be displayed in the PV.

2.2.2

Authorization by run time project model for each company

In the DEM Tool 5.2 it is possible to have more than one project model within one logistic company. This is very useful in situations where employees fulfill different roles, which are present in different project models. Project models need to be specified as run-time project models for each logistic company. An end user would normally get the default run-time project model for the start up company when starting the dynamic menu browser. If another run-time project model has been assigned in the Baan User DEM settings session, then that model would be used instead.

3. New functionality in the BaanDEM Tool

This chapter describes the new functionality of the BaanDEM Tool 5.2.

3.1 New functionality in master data

3.1.1 Versions

In versions there is a new session which revalidates licensed versions. To revalidate a licensed version, you have to define which version it is, give it a new expiry date and enter the license code. It is mainly applicable for the BBI reference models. It is done in the Revalidate Licensed Version (tgbg1247m000) session.

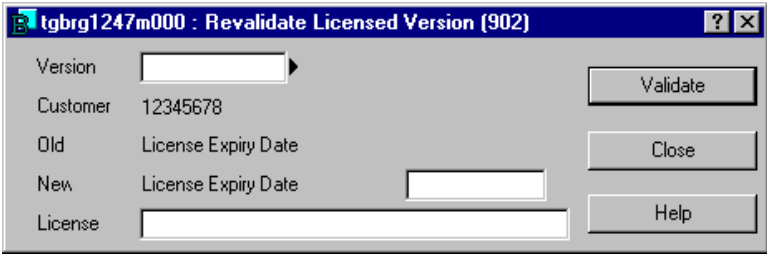


Figure 1 Revalidate licensed version

3.1.2 Component definition

Components is completely new functionality within the DEM Tool. Components will be used to enable DEM to model applications other than BaanERP. A component is an application that can operate in a stand-alone capacity. Examples of components are BaanERP Finance, BaanERP Distribution, Baan Front Office, MS Outlook, and so on. For DEM to be able to model different applications these need to be defined as components in the Component (tgbg5157m000) session.

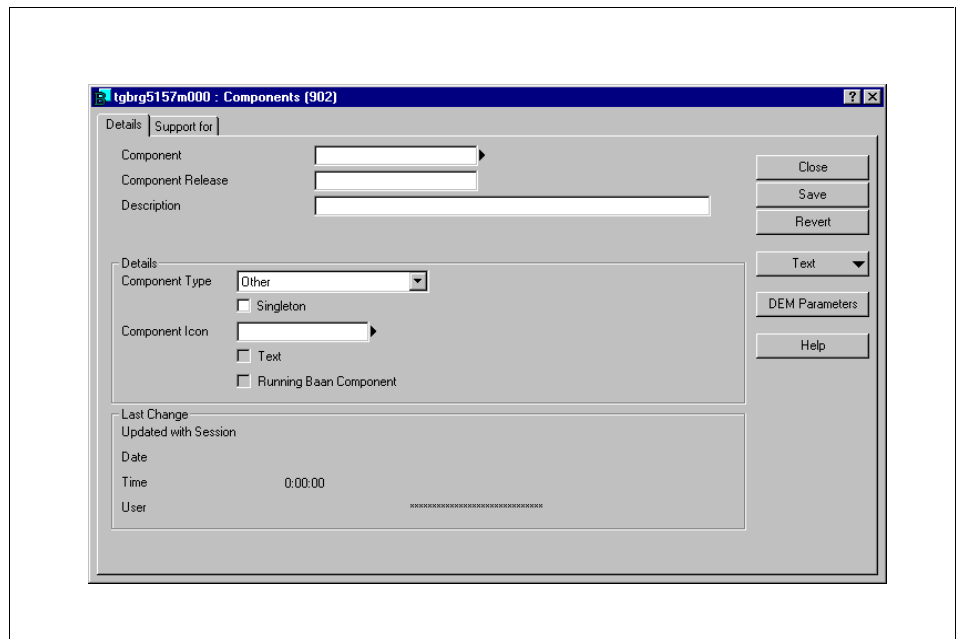


Figure 2 Components

In the DEM Tool, the sessions are now called applications. Session codes are application codes, and so on.

In the session shown in Figure 2, the component has to be inserted, an example which is BaanERP, and the component release has to be inserted, an example of which is Verdi. It is also possible to select a component icon, which will be displayed in the DMB. The Component Type field must be filled in as it makes sure whether the component type really is a Baan component or not.

In the second folder of this session, different authorizations can be selected (see Figure 3). These settings, for authorizations and start up options, define which authorizations and start up options are allowed for the applications of this Baan component. The login process is not yet used, but will be in the future when other non-Baan components are actually workflow enabled, and then it will be used if a login is required to start/ enter the component.

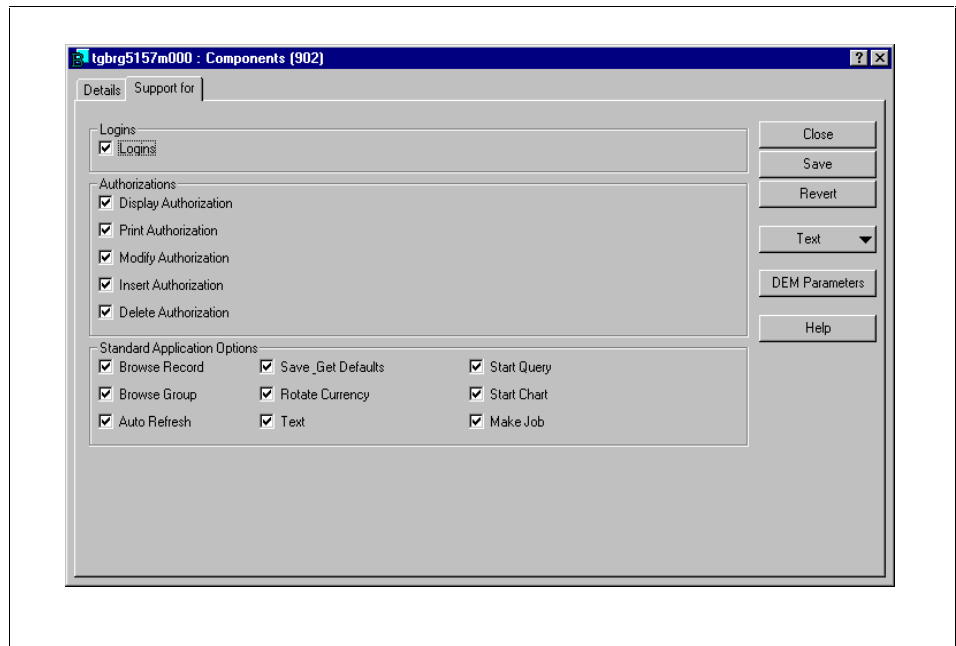


Figure 3 Components, second folder

Each component contains a number of applications. A user can use an application to carry out a certain function or task. Examples of applications are the functions offered by the sessions within the Baan application or sending an e-mail with MS Outlook. For the DEM Tool to know which applications belong to which component, an import can be done. This import is done through the Applications by Component (tgbrg5155m000) session. Where the component and component release are inserted and then through the specific menu in the toolbar, an import is done of all applications from running Baan component.

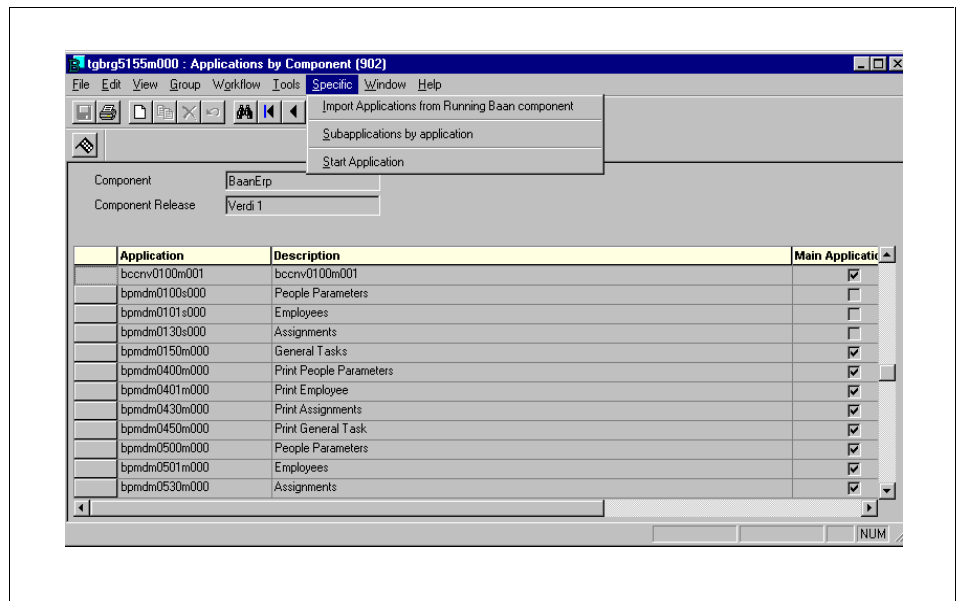


Figure 4 Applications by component

It will be possible to import all subapplications by application (subapplications were called subsessions in the BaanDEM Tool 5.1). The subapplications can be imported through the specific menu as well. This subapplication will be provided to the modeler if they want to change the authorization by subapplication (out of the EME editor).

3.1.4

Application conversion

The session conversion of applications is a conversion tool that translates the application codes between the different component releases. Sometimes a session in Baan IV exists in BaanERP but has another application code. The conversion tool translates the old application code into the new one. The conversion tool is complete, although there are more aspects not controlled by the tool, so the models still need to be reviewed manually. The aspects not controlled by the tool are such that sessions don't exist in the later version, or have become part of another session and so on, and these discrepancies need to be reviewed manually. The session in Figure 9, the Conversion of Applications (tgbrg5150m000) session, should not be modified by any end user or modeler. This is because all data in the conversion tool is originally filled in by the developers, as they have the session knowledge regarding the applications. Modifying the data might mean creating inconsistencies and faults in the conversion data.

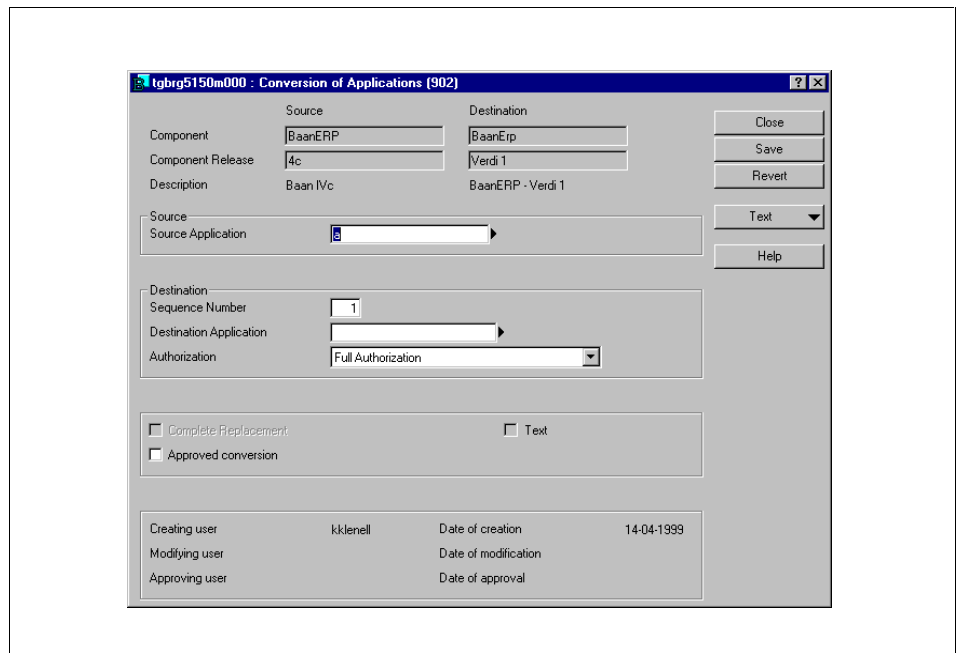


Figure 9 Conversion of applications

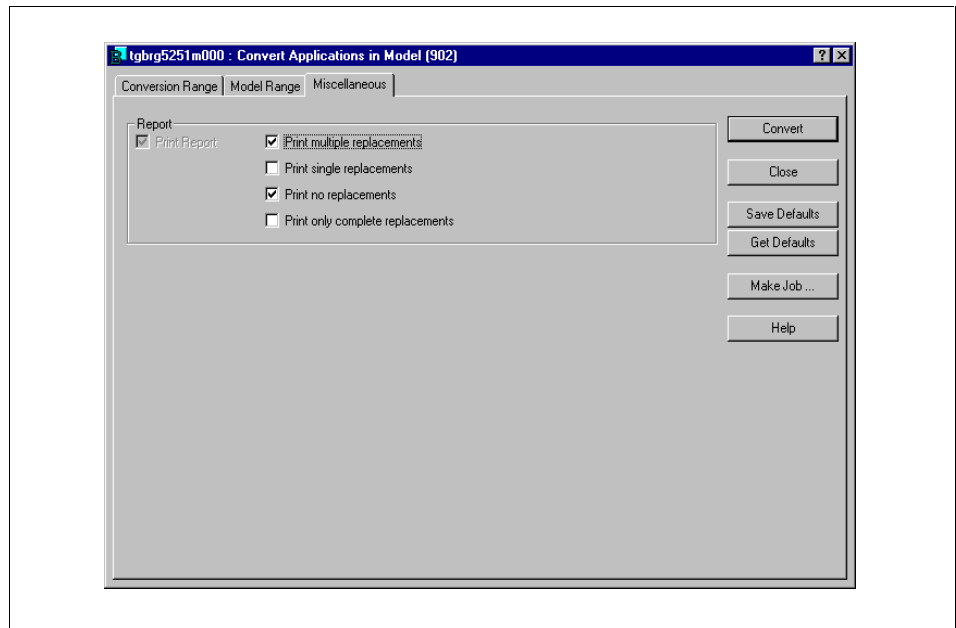


Figure 12 Convert applications in model (third folder)

3.1.5 Install client applications

The process viewer is a new client application that needs to be installed on the desktop of the end user. It is the process viewer of the dynamic menu browser. It is installed by following the install wizard, starting from the Install Process Viewer on the Client (tgbg9260m000) session.

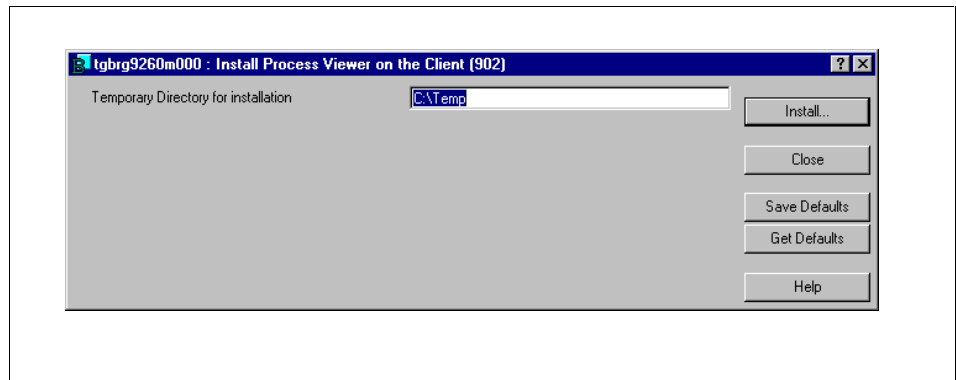


Figure 13 Install process viewer

The enhanced features of the process viewer will be discussed in section 3.6.

3.2 Model definition

3.2.1 Employees

The organization modeling has changed considerably. There is no longer a graphical interface of the organization model, as there was in previous versions. The organization model in the DEM Tool 5.2 consists of the definition of employees, roles, Baan user DEM settings, employee group types and employee groups. This means that both roles and employees are now defined in repository instead of in reference and project models.

Employees are defined in the Employees (tgbrg8135m000) session. The session contains more fields and information regarding the employee.

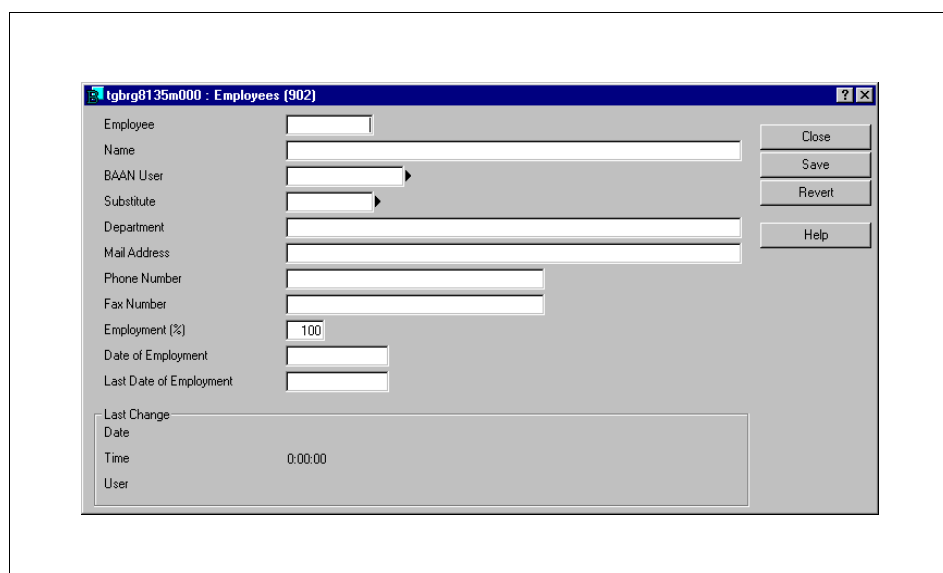
The image shows a screenshot of a BaanDEM Tool window titled "tgbrg8135m000 : Employees (902)". The window contains a form with the following fields: Employee (text), Name (text), BAAN User (dropdown), Substitute (dropdown), Department (text), Mail Address (text), Phone Number (text), Fax Number (text), Employment (%) (text, value: 100), Date of Employment (text), Last Date of Employment (text), Last Change (text), Date (text), Time (text, value: 0:00:00), and User (text). On the right side of the form, there are four buttons: Close, Save, Revert, and Help.

Figure 14 Employees

The fields in the session contain data regarding the employee, such as name, Baan user, department, address, phone numbers and so on. The field substitute is for workflow purposes and has no impact on the creation of dynamic menu browsers. Its functionality has to do with the scheduling of processes and activities in workflow. The Last Day of Employment field, filled in, leads to employees being unable to link roles or project models, and employees cannot start the DMB any more after that date. Employees are version independent, which means you only need to create them once and you can then use them in several versions and project models within the same logistic company. If you define the company where the employees are defined as a central modeling company, the employees will be available in the companies linked to the central company.

3.2.2 Baan user DEM settings

For the end user, some DEM settings need to be defined. This is done in the Baan User DEM Settings (tgbrg8136m000) session. For the DEM and Baan user, the default setting for the run-time project model and optimization phase can be entered, unless they are filled in automatically when the "configure Baan users by DEM employee" option is used with the values on company level. The default version, project model, and optimisation phase can be defined. By entering these defaults the system knows in which version, which project model, and which optimization phase it should start the dynamic menu browser for the end user, when they login to the system. The other default settings are for the end users desktop settings. One is for the amount of days it should be visible to the end user, from when a specific process has changed since they last logged on. The others can be set to tell whether the dynamic menu browser should start with main processes or not, or which activities should be visible in the customized menu browser. This is because it is possible to filter activities. It is also possible to define whether an end user is allowed to start the activities directly from the DMB or should be forced to use the process viewer to start activities. The session is presented in Figure 15.

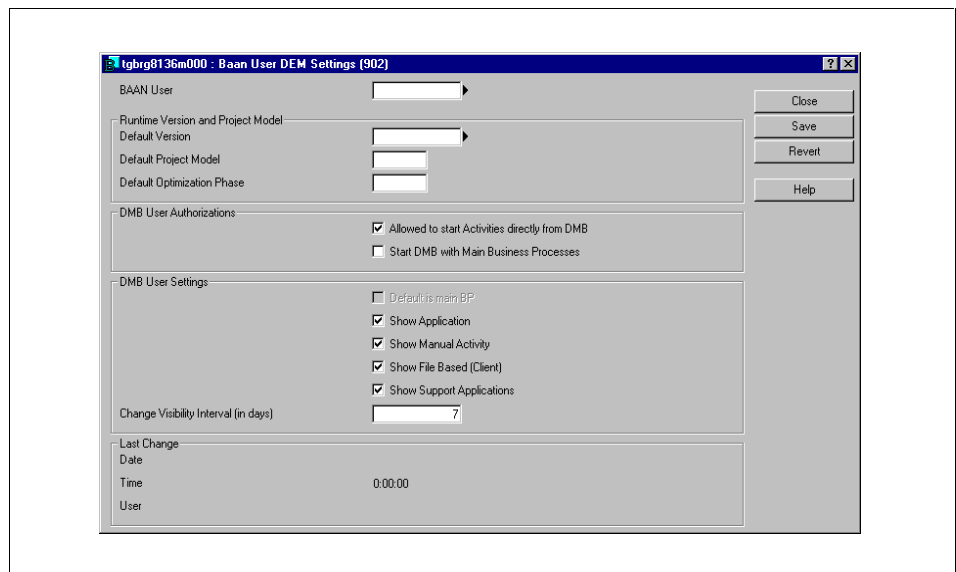


Figure 15 Baan user DEM settings

3.2.3 Employee group types and employee groups

Employee group types contain a group of employee groups, and the employee groups contain employees. Employee group types were created to be able to build a hierarchy. An employee group type is just a label that can be used to categorize employee groups, and an employee group is an organizational unit of employees. It is not mandatory to use for creating customized desktops, but for the use of workflow both employee group types and employee groups can be used.

They can be used for the distribution and extended scheduling of processes within workflow. This is because an employee can view which processes/activities are distributed to other employees in the same group.

There are no specific naming conventions for defining the different groups, but an example could be employee group type- sales, and employee groups- sales US, sales NL, and so on.

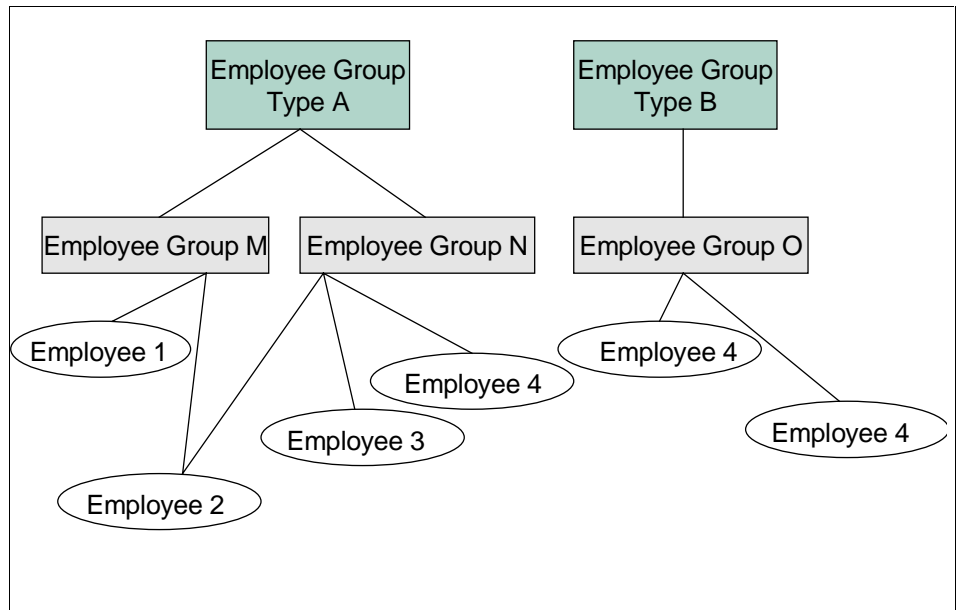


Figure 16 Employee group types

Employee groups can be defined in the Employee Group (tgbrg8155m000) session. From the field supervisor, it is possible to zoom to the employee table and select an employee as supervisor for the group. The supervisor is used for rescheduling of tasks within workflow. See Figure 17.

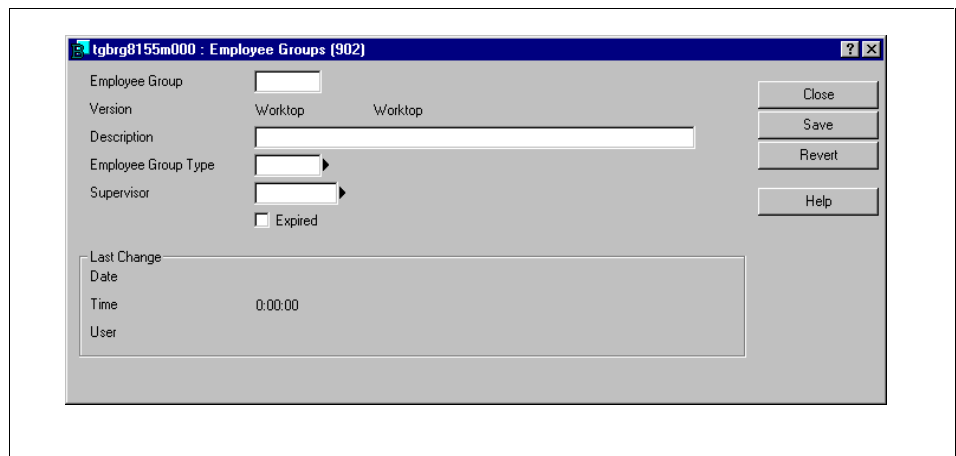


Figure 17 Employee group

3.2.4

Roles

In DEM Tool 5.1, Roles were created in the reference model or in the project model. They are now being created in the organization model in repository. Roles are created in the Roles (tgbrg8110m000) session. They are version dependent. Being created in the repository means that they can be linked to both employees and business processes already in the repository. Linking them to employees is carried out in the Employee (tgbrg8135m000) session, by the specific menu in the toolbar, link roles to employees. The link between role and employee is version dependent. This means that an employee can have different roles between different versions.

Linking the role to a business process can be done in the Business Processes (tgbrg5500m000) session. This can either be carried out using the buttons in the toolbar (see the circled buttons) or through the specific in the menu. Employee groups can also be linked to the process by one of the buttons in the toolbar or via specific. See Figure 18.

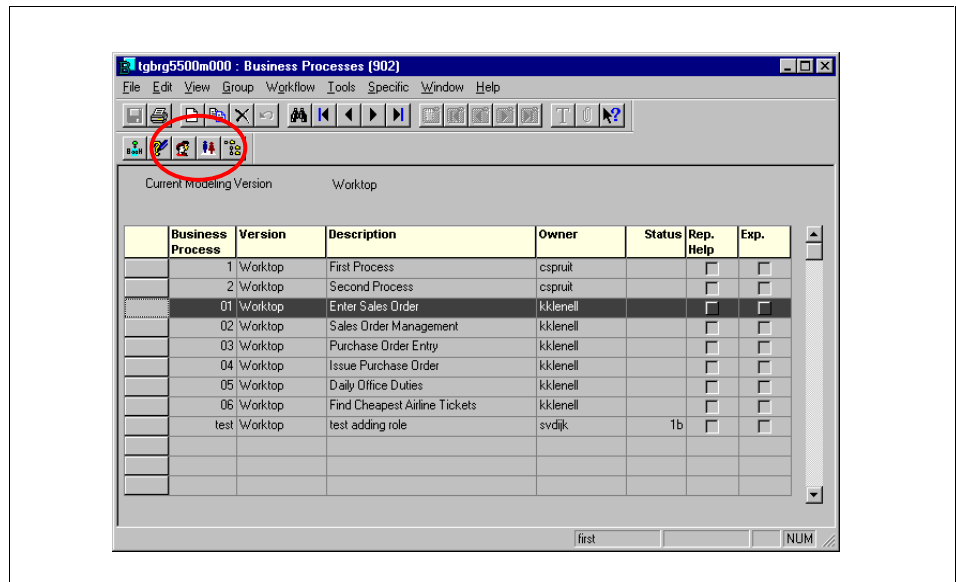


Figure 18 Business processes in repository

3.2.5

Enterprise structure models

Enterprise structure models are now created in only one session, which is the Enterprise Structure Model (tgbrg0512m000) session. It is not possible to create a reference enterprise structure model any more. The enterprise structure model that is chosen to go live will be defined as the operational enterprise structure model in the DEM Parameters (tgbrg0135s000) session.

3.2.6

Business models

It is now possible to set an attribute to define whether a business process is to be used in the dynamic menu browser or not. This makes it possible to use both workflow and dynamic menu browser in the same company. In the Business Process by Project Model (tgbrg4160s000) session, you can define whether the business process is for workflow use, DMB use, or for both, by marking the relevant checkboxes. This provides a clear distinction in the handling of the business processes (See Figure 19).

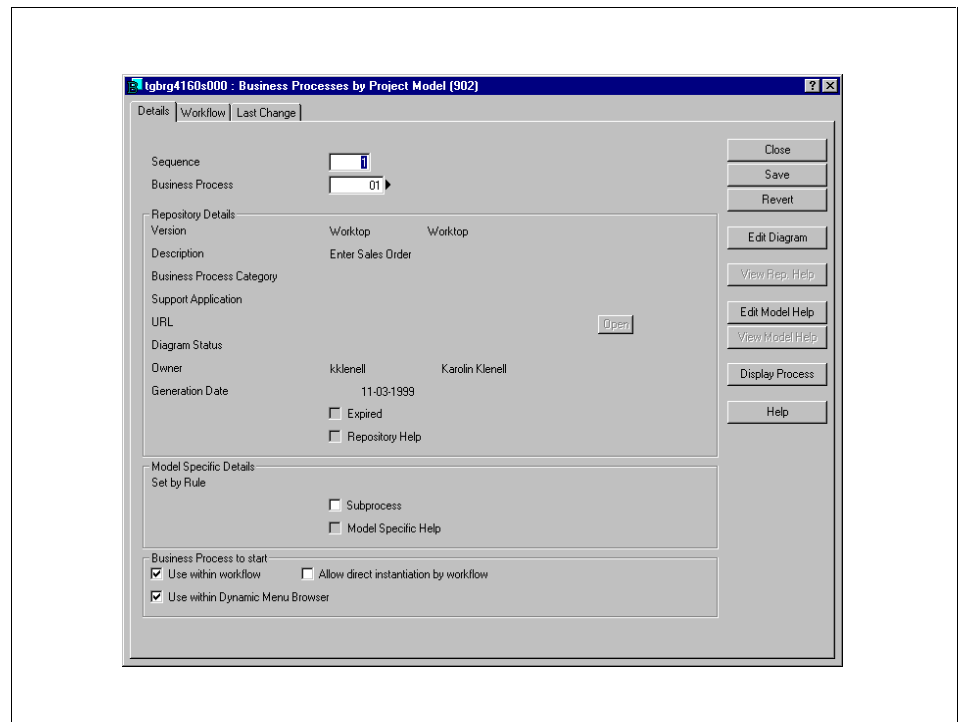


Figure 19 Business process by project model

3.3 Model item management

3.3.1 XML export to the DEM editor

For the DEM editor, the stand alone version of EME, this session has been created to export model data. The data is exported to the client machine and from there accessed by the DEM editor. The export of model data is done in the XML Export for DEM Stand-Alone (tgbrg1299m000) session. The session contains the usual choices for exporting version data, such as selecting a range of business processes, functions, business control diagrams, categories, master data and so on.

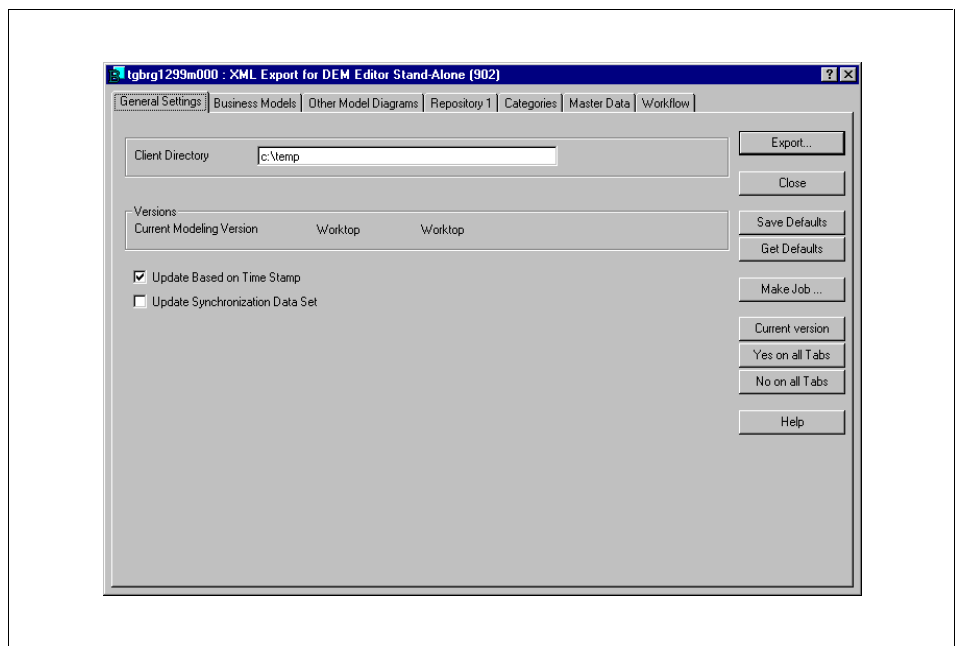


Figure 20 XML export for DEM editor stand-alone

3.4 Runtime model control

3.4.1 Component instances by component

Before a component can be defined and used as a component, at least one component instance of it must be created. Once the component is installed somewhere there is an instance of it. It has to be created at least once for each component as it contains the components executable. The component instance is created in the Component Instance by Component (tgbg5158m000) session. The important fields in this session are the ones that choose whether it is a client or server application, and the field that contains the executable. The field that selects a platform is not yet in use.

Figure 21 Component instance by component

3.4.2 Run-time version

It is now possible to have several project models by company, allowing multiple run-time project models by logistic company. If multiple project models are used for one company, you must specify the run-time project model that is used as default by checking the main project model check box. Main project models are used by the dynamic menu browser. Only one main project model for each company can be selected.

The purpose of using a main project model is that when a Baan user switches to another company, the main project model that is specified for that company is started automatically. The Baan user DEM settings (tgbg8136m000) session is always used, which reflects the (default) main project model settings, unless specifically changed. When no default project model has been selected, in the Baan user DEM settings (tgbg8136m000) session, the dynamic menu browser will start with the main project model that has been selected for the users start-up company.

The run-time project model, combined with the run-time version and the run-time optimization phase, determines the processes in the dynamic menu browser. All project models that are used, must be defined as run-time project models, in the Runtime Version, Project Model, and Optimization Phase for each Company (tgbg0105m000) session, see Figure 22. If authorized, end users can switch between project models and companies in the DMB.

At least one run time project model must be linked to the start-up company of the Baan user. The startup company for the Baan user can be selected for every Baan user in the User Data (ttaad2500m000) session.

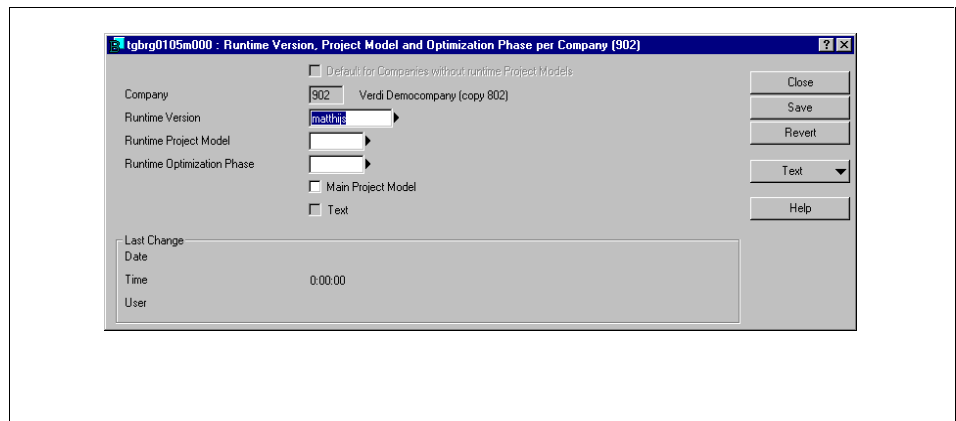


Figure 22 Runtime version, project model and optimization phase

3.5

Parameters

3.5.1

DEM parameters

The DEM parameters (tgrbrg0135s000) session is used to define the parameters for your DEM environment (see Figure 23 and Figure 24).

When the Use Employee- Project Model Link check box is selected, an employee cannot change to another run-time project model in the dynamic menu browser, unless they actually exist in that project model. If the check box is not selected, the authorization to change the run-time project model is only based on the role the employee is linked to.

The fields that are relevant to the running Baan component, must be filled in as they tell the system which active Baan component to use.

In the workflow settings in the second folder, it is possible to define whether workflow is enabled, only for modeling, or modeling and run-time. It is also possible to define the workflow server login and password.

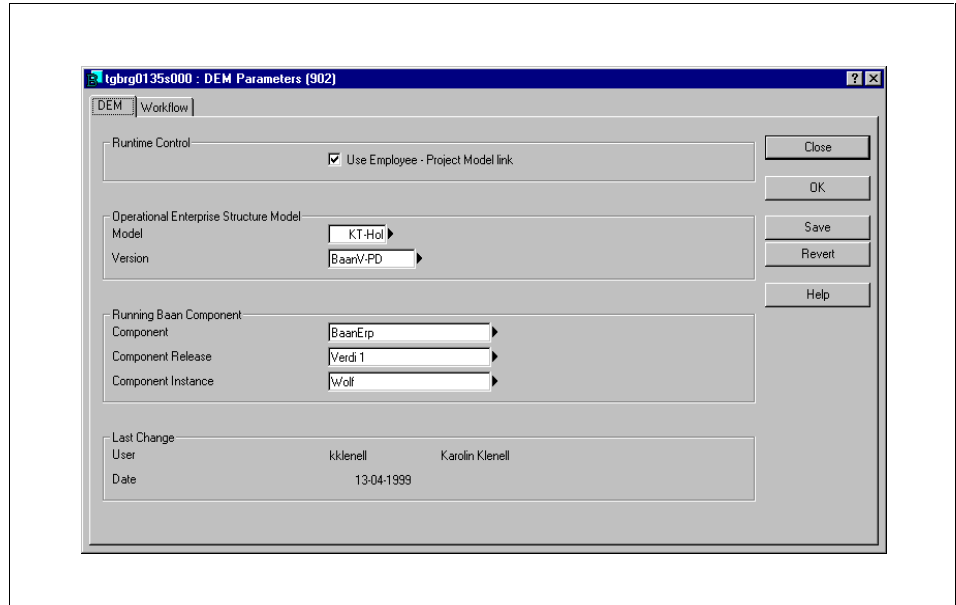


Figure 23 DEM parameters

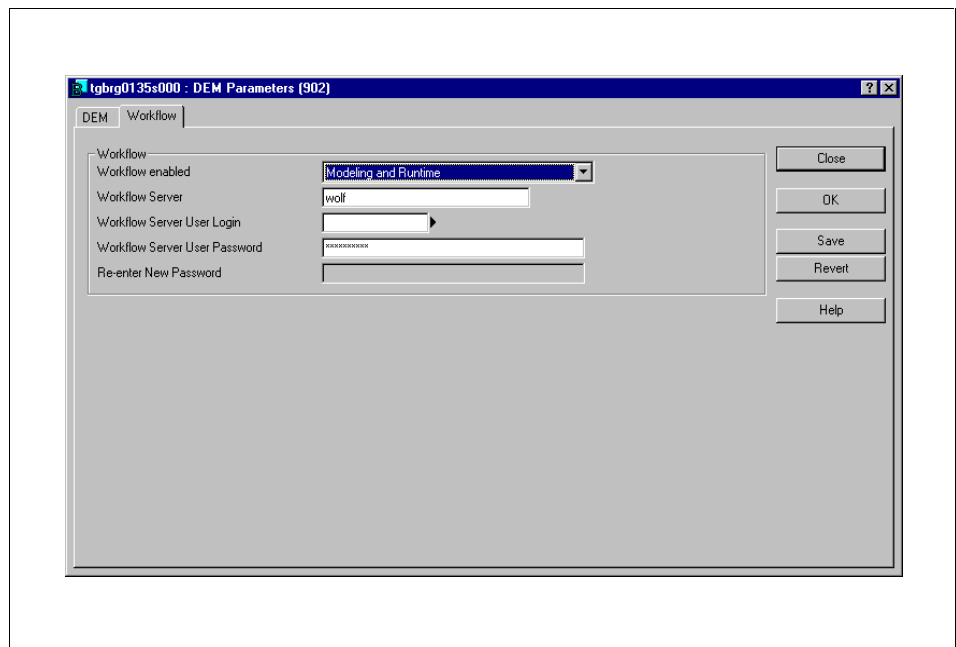


Figure 24 DEM parameters, second folder

3.6 New functionality in the dynamic menu browser

3.6.1 Starting the dynamic menu browser

For an end user, starting the DMB is done by logging in to Baan. To preview the DMB, you can start the preview of the screen in the Employees (tgbrg8135m000) session, in the specific menu in the toolbar, start screen employee.

3.6.2 View filter options

The filter option provides the possibility for the end user to filter out activities and utilities in the list view. The user can filter out the following activities from the DMB:

- manual activities
- applications
- file-based activities
- sending triggers
- utilities

This is done by turning on/off the menu options in question, visualized by a check mark. For this a new menu has been introduced, the View menu. The specified filter settings will immediately be stored in the DMB user defaults. After each filter change, the DMB tree has to be refreshed.

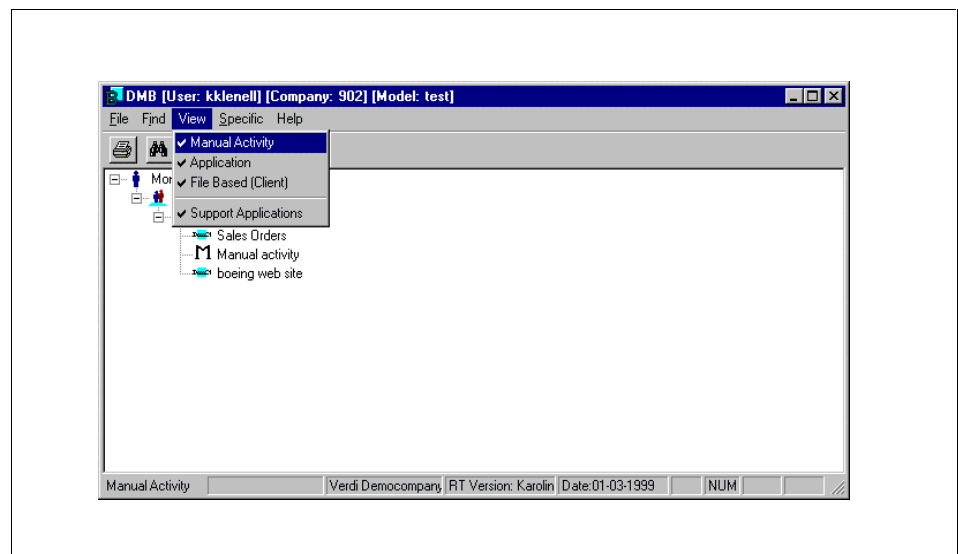


Figure 25 Filter options in the DMB

3.6.3 Change visibility interval

There is an option to highlight business processes in DMB, based on the amount of time passed since the process was last changed. This is used to tell the end user that they should expect changes within the process. The business process icon will return to the normal look if the time since the last update is longer than the interval specified by the user. The specified interval will immediately be stored in the Baan user DEM settings. If the change date of the business process is greater than the current date minus the number of interval days, the new business process will show a different icon in the DMB tree. Changes in a certain business process will only be visualized for the business process in question. They will not be extended to any parent process of this business process. Changing of the visibility time is done in the Baan User DEM Settings (tgbrg8136m000) session. See the difference in icons in Figure 26, where the icon of the process new test process is the icon telling you that the process has been changed recently, and the icon by the KK TEST process is the regular icon.

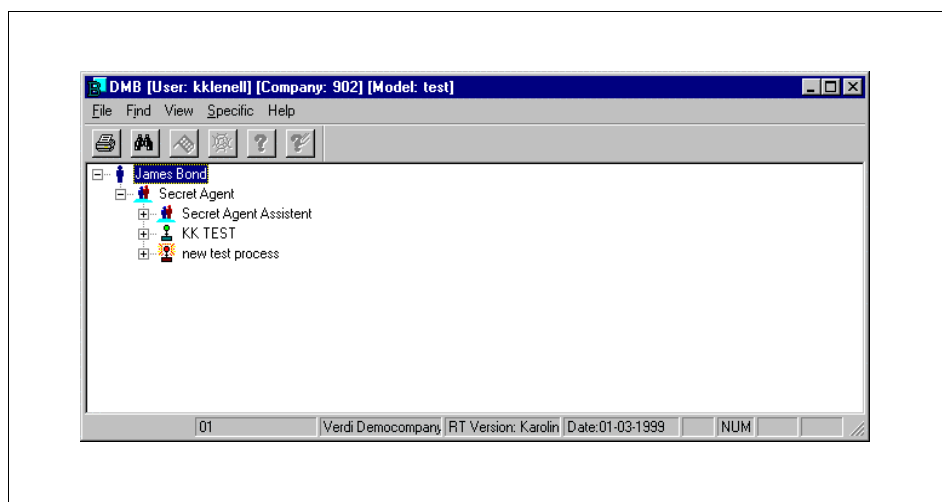


Figure 26 Visibility of changed process, by different icon

3.6.4 Storage of DMB user defaults

The DMB user settings will be stored. User settings, such as View Filter options, change visibility interval days, DMB starting with main business process or not, and number of tree levels to be opened at startup, will be saved automatically, and will still be active the next time the user starts the DMB.

3.6.5 Linking of URLs to activities

The linking of Unified Resource Locators (URLs) to activities will make it possible to open a web page, from within the DMB, based on the URL linked to the activity. That is, activating the URL causes the Internet browser software to be automatically started and go immediately to the specified address.

3.7 Process viewer

The process viewer (PV) is the run time end user interface, started from the dynamic menu browser, which displays the business processes. It shows the process flow to the user in a graphical way. The PV is a run-time tool for the end user, while the enterprise modeler editor is a modeling tool for modelers. PV is now developed as a client application. Graphical processing of data will now be handled on the client side, decreasing network traffic. PV will implement the same look and feel as the enterprise modeler editor.

3.7.1 General architecture of the PV

PV functionality is transferred from the server to the client side. A lightweight version of the EME will serve as a replacement for the current server side PV. PV ensures a common look and feel of both run-time and modeling environment.

PV has to be installed on the client, being a lightweight product it does not take up much disk space. Installation is simple. Whenever the DMB tries to start up the PV at the client, the availability of the PV is checked first and, when not available, the user will be guided through the installation. A PV version has to be installed only once. Users will be given notices of updates of the PV when a new version is available.

For installation of the PV see section 3.1.5.

4.

Procedures related to DEM

This chapter describes the new procedures related to DEM.

4.1

Global procedure

The global procedure of the new steps needed to perform in the system while working with the DEM Tool 5.2.

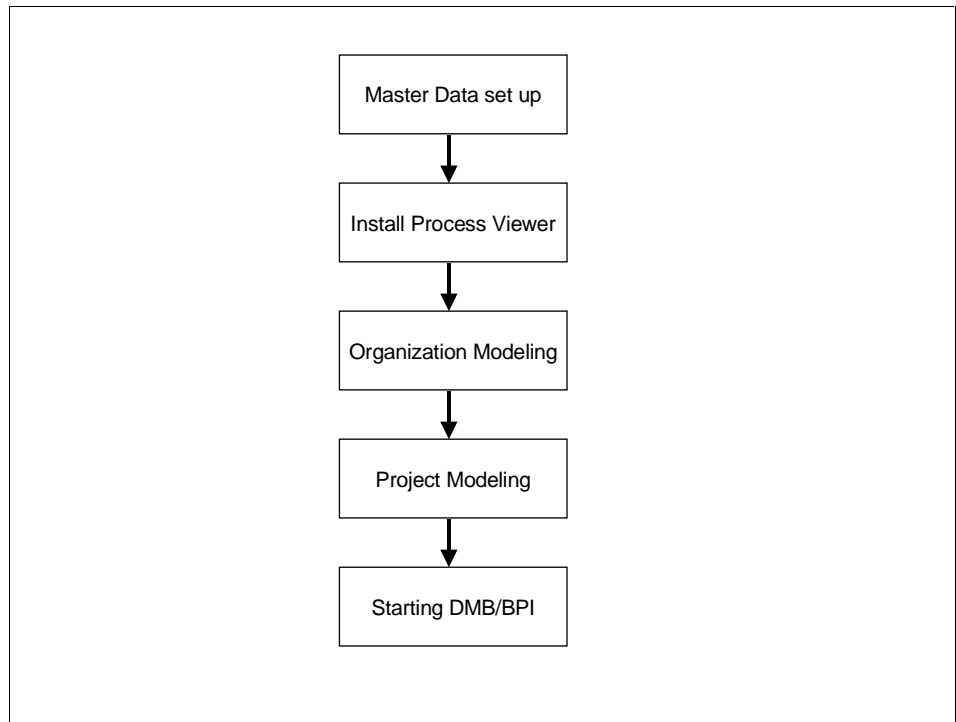


Figure 27 Global procedure

4.1.1 Master data set up

One of the first steps is to define, the component and the component release that you want to model in. At least one component instance by component must be created for the running component. DEM parameters need to be set, applications by component need to be defined, and the version and current version by user needs to be defined and set.

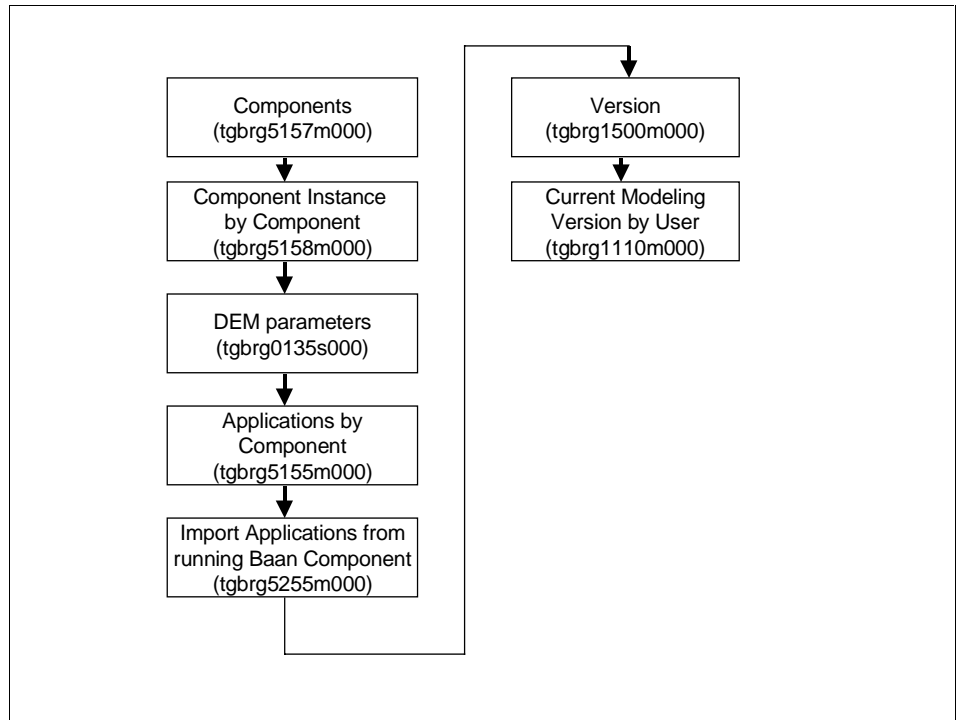


Figure 28 Master data set up

4.1.2 Install process viewer

To use the graphical display of the dynamic menu browser, the process viewer has to be installed on the client.

4.1.3 Organization modeling

The definition of employees and roles is now done in the new organization model. Baan User DEM settings need to be set for the users. The links between processes and roles is also done in the repository.

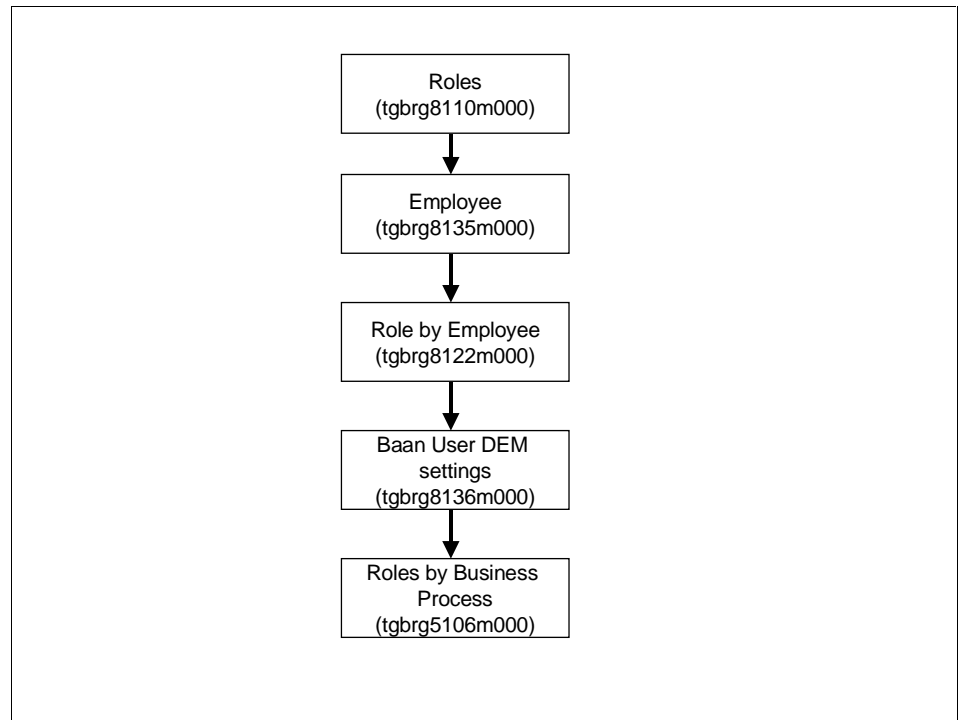


Figure 29 Organization modeling

4.1.4 Project Modeling

The steps needed to set up a project model, which provides the base of the dynamic menu browser.

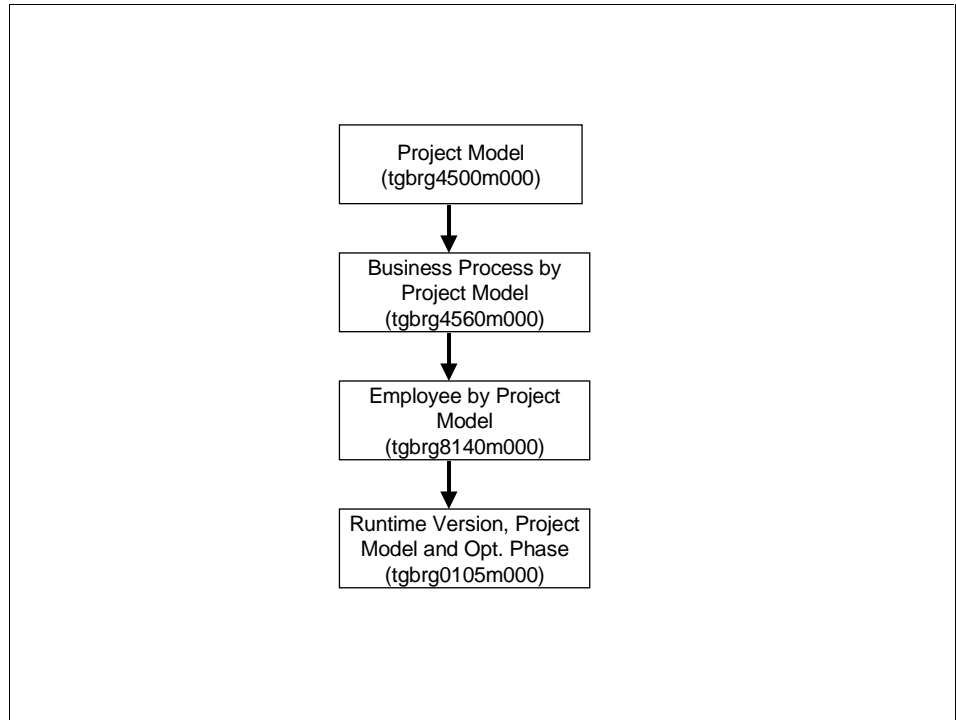


Figure 30 Project modeling

4.1.5 Start the Dynamic Menu Browser

You can start the Dynamic Menu Browser through the process viewer preview of the employee session.