

**BaanDEM<sup>SE</sup>**  
**Enterprise Modeler**

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Module Procedure

UP043A US





## Document information

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## About this document

Read this document to get an overview of the Enterprise Modeler (BRG) module's functionality and to learn more about the functional procedures that are related to BRG.

You need no detailed knowledge of the BaanDEM<sup>SE</sup>, software to read this document. However, you are more likely to understand the contents if you are familiar with:

- The overall structure of packages, modules, and sessions in the BaanSeries software
- The general business procedures used in everyday business practice
- The basic concepts of enterprise resource planning

For detailed descriptions of the module's sessions, refer to the BaanDEM<sup>SE</sup> comprehensive online Help.

## To use this document

Read Chapter 1, The Enterprise Modeler (BRG) module in BaanDEM<sup>SE</sup>, if you want to know more about:

- The module's functionality
- The relationship of the module with other modules
- The functionality of the module's business objects

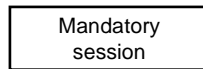
Read Chapters 2 to 6 if you want to know more about:

- The sessions in the procedures
- The results of the procedures
- The sessions that are related to the procedures

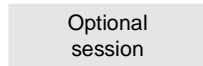
## Acronyms used in this document

AAD	Application administration
AMS	Authorization management system
BRG	Enterprise modeler
CF	Baan Configurator
CI	Baan Central Invoicing
CP	Baan Constraint Planning
DC	Baan Development Control
EC	Baan Electronic Commerce
EIS	Enterprise performance manager
ERM	Entity relationship modeling
PI	Baan Project Industries
QM	Baan Quality Management
TC	Baan Common
TD	Baan Distribution
TF	Baan Finance
TI	Baan Manufacturing
TP	Baan Project
TS	Baan Service
TT	Baan Tools
TU	Baan Utilities
WH	Baan Warehousing
WZR	Wizards

## Legend



Indicates a mandatory session



Indicates an optional session



Indicates a module



Indicates a module that is described in the module procedure

# 1. The Enterprise Modeler (BRG) module in BaanSeries

This chapter provides information on:

- The function of BRG in BaanSeries
- The modules related to BRG
- The functionality of BRG's business objects

## 1.1

### The function of BRG in BaanSeries

Unlike the application packages of BaanERP, the Enterprise Modeler (BRG) module can be used before the information system is operational. If your company is going to implement a new information system using the BaanERP applications, Baan must be used to structure the selection process, and to perform the actual implementation and optimization of the information system.

The Enterprise Modeler module functions as a decision support system in the following three ways to assist you develop a vision on:

- How to functionally structure an organization
- How to organize the business processes of the organization
- How to integrate the information system with these business processes

The BRG module can assist during the implementation of the components of the information system based on the vision, which was developed by means of the BRG module. After the information system has been implemented, the BRG module can be used to monitor the critical success factors of an organization.

During the selection phase, the BRG module can be used to function as a decision support system by visualizing the effects of decisions on the information system and its users. For example, decisions on business functions, business processes or the organization diagram may affect the number of sessions and other (manual) activities that must be implemented. In turn, this will affect the workload of the responsible employees.

During the implementation phase, the BRG module can be used to support other decisions. In addition, the BRG module can also be used to assist the actual implementation of the Baan applications by:

- Setting the Baan parameters.
- Generating the Baan users, based on the employees that are defined in the BRG module. These are the people who are going to work with the Baan packages.
- Creating the user dialogs and session authorizations for the employees.

User dialogs are screens from which the sessions can be activated. Employees need these to accomplish the tasks for which they are responsible as defined in the BRG module. In this sense, the BRG module is also used when the information system is operational, because the created user dialogs are used by the users to activate the necessary Baan sessions.

During the optimization phase, the BRG module is used to assist in:

- Making additional decisions regarding the Baan components that must be optimized
- Assist in the actual implementation of the required optimizations
- Monitor the current status of the critical success factors of the organization that is working with the newly implemented information system

The values of these critical success factors are displayed by means of performance indicators, which can be linked to different business functions or business processes.

## 1.2

### The modules related to BRG

The following relationships exist between the BRG module and other parts of BaanSeries (see figure 1):

- All Baan application packages, because the BRG module can be used to set the parameters of these packages.
- The user management functionality of the Baan Tools in which the Baan users are stored. Also the menu management functionality of the Baan Tools, in which the user dialogs are stored.
- The Enterprise Performance Manager (EIS) module in which the performance indicators are stored.
- The Workflow Management System (WMS) module, because the WMS module uses the workflow-enabled business processes of the Enterprise Modeler module.
- The Entity Relationship Modeling (ERM) module, because the data models are stored in versions that are defined in the Enterprise Modeler module.
- The Wizards (WZR) module, because you can link wizards to business functions to set the values of the BaanERP parameters.

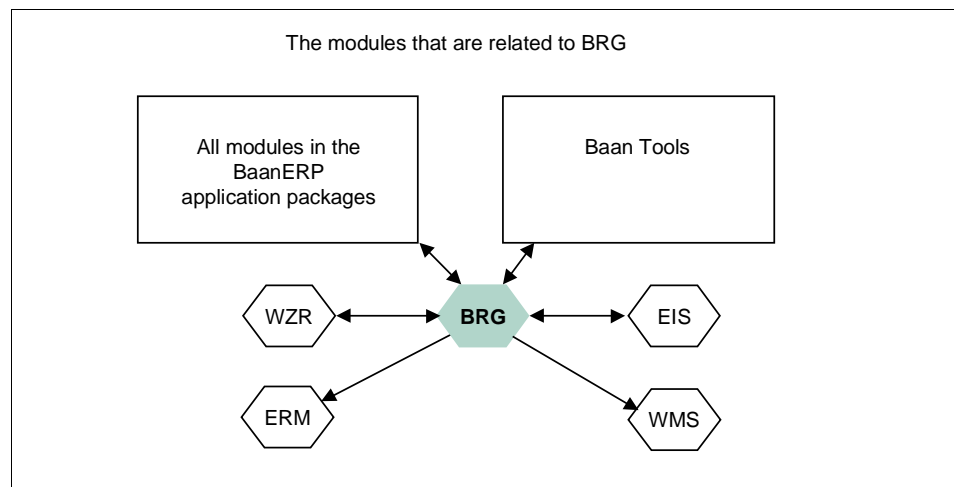


Figure 1, The modules related to the BRG module

## 1.3

### The functionality of BRG 's business objects

BRG contains the following business objects:

- Master Data (Chapter 2)
- Repository (Chapter3)
- Business Modeling (Chapter 4 and 5)
- Enterprise-structure modeling (Chapter 6)
- Data Modeling (UP045A US)

#### Master Data

Use this business object to create basic data that you need in the remaining business objects in the following way:

- First, you must indicate the Baan company in which Baan must store the enterprise modeler components. If you do not specify a company, you cannot use enterprise-structure models.
- Next, you must create versions and development statuses and define which Baan user is authorized to maintain components from that version and/or status.
- Finally, you must maintain a list of Baan application parameters that you can link to reference or project models. In those models the parameter values are made model-specific and exported back to the application packages.

#### Repository

Use this business object to create a repository (library) of the following Enterprise Modeler components which serve as a basis for reference or project models:

- Business functions
- Business processes
- Wizards
- Business control diagrams
- Utilities
- Static-conditions
- Dynamic-conditions

You can also maintain rules. Rules are expressions that are used to:

- Check the consistency of a business function model (consistency rules)
- Transform a business function model to a business process model (transformation rules)
- Assign a value to the application parameters (parameter-setting rules)
- Assign a value to static conditions (static-conditions)

## **Business Modeling**

Use this business object to maintain:

- Reference models
- Project models

A reference model represents a line of business or business typology and can be built from a library (repository) of Enterprise Modeler components.

A project model is an organization-specific model that can also be built from a library (repository) of Enterprise Modeler components, and can be based on a reference model.

## **Enterprise-structure modeling**

Use this business object to maintain enterprise-structure models. An enterprise-structure model is graphically represented by a map, on which all the participants (enterprise units) in the supply chain are graphically represented at organization/enterprise level.

After you have created one or more enterprise-structure models, you must define which model is the operational enterprise-structure model used by Applications for currencies, and transaction types between enterprise units. The operational enterprise-structure model's enterprise units are the direct link between the Baan application data, such as a warehouse or an entity on the one hand, and a business model on the other hand.

## 2. Master data

This chapter describes both the master-data procedure and the conversion procedure in the Master Data business object.

The master-data procedure contains steps that are related to version control, component-type status authorizations, and parameter maintenance.

The conversion procedure describes how you can reuse business processes, wizards, and utilities from an old (source) BaanIV environment in a new (destination) BaanSeries environment.

The procedures contain mandatory as well as some optional sessions. The remaining optional sessions are described in section 2.3.

### 2.1

### The master data procedure

The objective of this procedure is to maintain the basic data that you need before you start to create a repository of Enterprise Modeler components or a reference/project model.

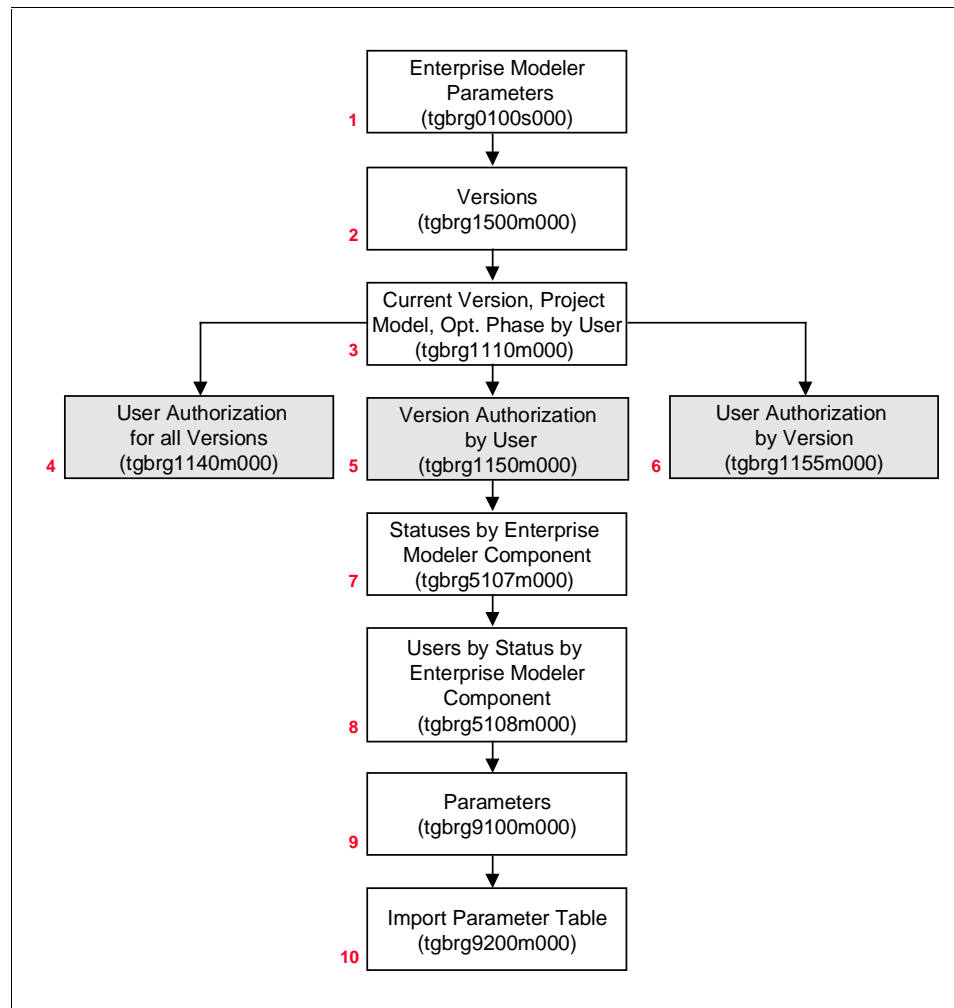


Figure 2, The master data procedure

**Step 1 Enterprise Modeler Parameters (tgbrg0100s000)**

Use this session to indicate the company in which Baan must store the enterprise-structure models or all enterprise-modeler components. If you do not specify a company, you cannot use any enterprise-structure model.

Do not select a company other than one that is linked to your current package combination.

A question appears after you have defined or changed a company. If you answer that question in the affirmative, the same storage company is automatically defined in all companies that are linked to your package combination.

**Example**

Package combination:	B50new.
Companies linked to the package combination:	100, 101, 102.
Storage company :	101

This means that the enterprise-structure models or, if desired, all enterprise modeler components are stored in company 101, no matter in which company you work.

**Step 2 Versions (tgbrg1500m000)**

Use this session to maintain versions. By means of versions you can uniquely identify enterprise-modeler components such as business functions, business processes, and reference models.

When you insert a new version, the **Use Authorization Mechanism for version to authorize yourself?** question appears. If you click **Yes** you can skip steps 5 and 6 of the master data procedure.

**Step 3 Current Version, Project Model, Opt. Phase by User (tgbrg1110m000)**

Indicate the version in which you want to maintain or display data. If your current version is derived from another version, Baan also displays data of that version. However, you cannot maintain the latter data.

**Step 4 User Authorization for all Versions (tgbrg1140m000)**

Use this optional session to authorize a Baan user for all versions at the same time. If you authorize a user in this session, that same user is automatically included for all versions in the following sessions:

- Maintain Version Authorization by User (tgbrg1150m000)
- Maintain User Authorization by Version (tgbrg1155m000)

**Note**

If you do not want to authorize a Baan user for all versions, use one of the above two sessions

**Step 5 Version Authorization by User (tgbrg1150m000)**

You can use this optional session to authorize a Baan user for one or more versions. Select a user and specify the versions for which the user must be authorized.

**Step 6 User Authorization by Version (tgbrg1155m000)**

You can use this optional session to authorize a Baan user for one or more versions.

**Note**

If you do not authorize users for a version, every user is authorized for that version. However, if specific users are authorized for a version, nobody else is authorized. This mechanism applies to all version-authorization sessions.

**Step 7 Statuses by Enterprise Modeler Component (tgbrg5107m000)**

You can use this optional session to link self-defined statuses to component types such as business functions and business processes.

**Step 8 Users by Status by Enterprise Modeler Component (tgbrg5108m000)**

You can use this optional session to assign Baan users to a combination of a component type and a component status.

**Note**

If you do not specify users for a combination of a component type and a status, every user is authorized for that component type/status-combination, provided that the user has the proper version authorization.

Authorization by status is given to Baan users to prevent unauthorized users from changing enterprise-modeler components that are in the making.

**Step 9 Parameters (tgbrg9100m000)**

You can use this session to maintain a list of application parameters, which you can link to a reference model or to a project model so that you can configure the Baan software according to those models.

**Step 10 Import Parameter Table (tgbrg9200m000)**

Use this session to import a range of parameters from the Baan application database into the Parameters (tgbrg9100m000) session, so that you do not need to insert each parameter separately. This session can only be started from the Parameters (tgbrg9100m000) session.

The values of the parameters are set or changed in the Values by Parameter, Company, and Model (tgbrg9110m000) session.

## 2.2

### Conversion procedure

The objective of this procedure is to convert session codes from an old (source) environment to a new (destination) environment (see figure 3). A Baan environment can be compared with a Baan release, such as BAAN IVa, BAAN IVb, and BaanERP. Because it is time consuming to create business processes, wizards, and utilities from scratch for every new Baan environment, reuse of those components is recommended. However, session codes are sometimes changed in a new environment and therefore these codes must also be changed in the business processes, wizards, and utilities in which they occur.

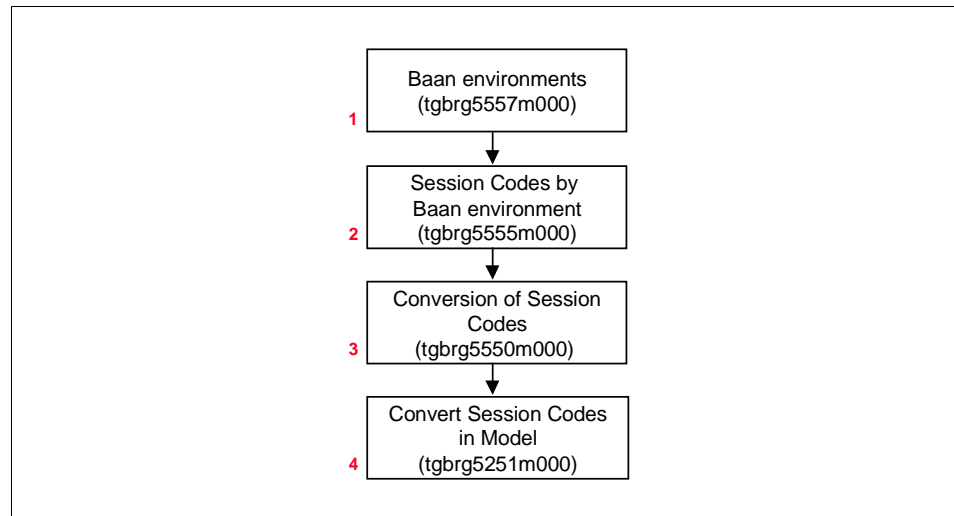


Figure 3, The conversion procedure

#### Step 1 Baan environments (tgbrg5557m000)

Use this session to maintain Baan environments for which you can maintain a list of sessions in the Session Codes by Baan Environment (tgbrg5555m000) session.

#### Step 2 Session Codes by Baan Environment (tgbrg5555m000)

Use this session to maintain a list of session codes per Baan environment.

You can make a selection from this list when you zoom from the **Session** field to the Source Baan environment in the Conversion of Session Codes details (tgbrg5150s000) session.

#### Step 3 Conversion of Session Codes (tgbrg5550m000)

Use this session to specify the session codes in the destination environment that must replace the session codes in the source environment.

You can define one or more destination session codes for one source-session code. The sequence number indicates the number of destination sessions that replace the source sessions.

**Example**

Source session	Seq. Number	Destination session code
tgbrg1234m000	1	tgbrg2222m000
tgbrg1234m000	2	tgbrg3333m000
tgbrg4444m000	1	tgbrg5555m000

**Step 4 Convert Session Codes in Model (tgbrg5251m000)**

Use this session to actually carry out the session code conversion.

The following types of session-code conversions can be distinguished:

- **Multiple conversion**  
For each source-session code you define multiple-destination session-codes. Baan replaces the source code by the destination code with the lowest sequence number.
- **Complete conversion**  
For each source-session code you define one destination session-code. Baan replaces the source code by the destination session-code.
- **No conversion**  
You have not defined a destination session-code for a source-session code. No conversion is carried out.

**2.3****Optional sessions**

This section describes the remaining optional sessions in the Master Data business object.

**Export Version Dump (tgbrg1235m000)**

Use this session to export version data to an ASCII file.

You can use the ASCII file for the following purposes:

- Copy data from one server or company to another server or company
- Translate descriptions and texts

All data in the selected version that falls within the selection range will be exported. Select the **Include previous versions** check box to export data from versions, from which the version you select, is derived.

Use the Import Version Dump (tgbrg1245m000) session to import data that is exported with the current session.

**Import Version Dump (tgbrg1245m000)**

Use this session to:

- Copy data from one system or company to another system or company
- Import translated descriptions and texts

Import files are created with the Export Version Dump (tgbrg1235m000) session.

If the source version, created with the Export Version Dump (tgbrg1235m000) session, is different from the version into which you import the data (target version), you must select the **Import Components into different Version** check box.

While the data is being imported, Baan checks whether the version that is to be imported already exists in the target system or company. If an earlier version does not already exist, the **Version of Dump does not exist; add version?** question appears.

If the import file contains data from derived-from versions, the file was exported with the **Include previous versions** check box selected in the Export Version Dump (tgbrg1235m000) session. Consequently, this structure should also exist in the system or company into which the file is to be imported.

If the data in the file is incorrect, a log file is printed with the errors and the line number in the file.

### **Copy Version Data to Other Version (tgbrg1200m000)**

Use this session to copy version data from one version to another version so that new business repositories and business models can be created from parts of repositories and models in other versions.

In addition to the selected components, the components that are related to the selected component are also copied. If, for example, you select a reference model, the business-function model that is included in that reference model is also copied. However, due to the fact that the business-function model exists mainly of links to the business functions in the repository, you have to make sure that the components that are included in the reference model are also included in the repository of the target version. If that is not the case the business-function model in the reference model is not copied.

### **Responsibility Codes (tgbrg8130m000)**

Use this session to maintain responsibility codes.

You can assign responsibility codes to roles in the following sessions:

- Roles by Business Process by Business Model (tgbrg3140s000) session
- Roles by Activity by Business Process by Business Model (tgbrg3150s000) session

If the value of the **Execute Activity** field is **Yes**, the business-process activity to which you link this responsibility code can be carried out by a user with the right role. If the value of that field is **No**, the business-process activity to which you link this responsibility code cannot be carried out.

#### **Note**

If at least one of the responsibility codes that is linked to a business-process activity has **Execute Authorization = Yes**, then that activity can be carried out.

**Example**

Responsibility	Execute activity
A	No
B	Yes
C	No

So, if you link the above responsibilities to a business-process activity, a user with the right role can execute that activity even though two of the responsibilities do not have permission to be executed. However, if no responsibility codes are linked to a role, then the **Execute Activity** field is always **Yes**. Hence, the use of responsibility codes is optional.

**Category sessions**

In the Master Data business object you can use categories to group components of the same type. The following category sessions can be distinguished:

- Enterprise Unit Categories (tgbrg0132m000)
- Enterprise-unit relationship Categories (tgbrg0445m000)
- Business-control diagramCategories (tgbrg9155m000)
- Business-control diagramFunction/Buffer/External Agent Categories (tgbrg9175m000)
- Business-control diagramTrigger Categories (tgbrg9185m000)
- Business Function Categories (tgbrg2120m000)
- Business Process Categories (tgbrg5105m000)
- Business-process activity Categories (tgbrg5525m000)
- Entity Type Categories (tgerm2150m000)
- Entity Type Relationship Categories (tgerm3150m000)
- Wizard Categories (tgwzr5100m000)

**2.4****Version control**

By means of version control you can either maintain a specific version of a business model or business model component, or extend an existing model with specific components. You can achieve the latter method by using a derived-from version. A derived-from version contains a reference to all components of the source version, plus the components that you add to it in the version that is derived from the source version.

When you modify a component in the source version, this modification also applies to the derived-from version. However, if you modify a component in the derived-from version, the modification only applies to that version.

**Note**

The Enterprise Modeler versions are not related to the Baan versions (Package VRCs).

The example below shows (current) version 01, which only consists of components of the same version.

**Example**

Example 1		Current Version	01
Business Process	Version		
DBA001	01		
DBA002	01		
DBA003	01		

The example below shows (current) version 02, which consists of source version 01 components and derived-from version 02 components. Because the current version is 02, you can only modify the version 02 components.

For example, if you want to change the description of business process DBA002, you must copy that business process to version 02.

**Example**

Example 2		Current Version	02
Business Process	Version		
DBA001	01		
DBA002	01		
DBA003	01		
DBA004	02		
DBA005	02		

Version control applies to the following components:

- Business functions
- Business processes
- Wizards
- Reference models
- Project models
- Data models
- Business control models
- Enterprise structure diagrams
- Static conditions
- Dynamic conditions
- Rules
- Utilities

## 2.5 The authorization mechanism

The authorization mechanism serves to avoid changes of enterprise modeler components by unauthorized users. The authorization mechanism consists of the following three components:

- Version authorization
- Status authorization
- Component authorization

The authorization mechanism only applies to the repository and does not apply to:

- Project models and reference models
- Components, such as business processes, which are incorporated in project models and reference models

Firstly, a user must be authorized for a version in which the component occurs.

### **Note**

If you do not specify Baan users for a specific version, all Baan users are authorized for that version.

Secondly, a user must be authorized for the status of the component before the component can be modified.

Specify for each status of a component type which users are authorized. You can either include a Baan user or a tools role that applies to him/her.

### **Note**

If you do not specify Baan users or tools roles for a combination of a component type and a status, every Baan user is automatically authorized for the component type with that status. Super users have all tools roles. So whenever a tools role is authorized for a status of a component type, all normal users with that tools role and all super users are authorized

### **Note**

If no tools role is specified for a combination of a component type and a status, a super user is not automatically authorized. In that case he/she must be explicitly defined as a Baan user for the combination of component type and status.

Lastly, a user must have authorization for the component itself. This type of authorization can apply to the following (group of) Baan user(s):

- The owner of a component
- A Baan user who has the tools role that is linked to the component
- Everybody (all Baan users)



### 3. The repository

This chapter describes the repository procedure. The repository is a library of enterprise-modeler components. You need these components as a basis for reference models or project models. You can build a project model based on reference-model components or -less common- a reference model based on project-model components. However, you still need the components from the repository to build at least one of both model types.

**Note**

For detailed information about the Enterprise Modeler Editor (EME), the editor commands, and the building blocks that you can use to build diagrams, see the U7066A US manual.

#### 3.1 The repository procedure

The objective of this procedure is to define components that you can use as the building blocks of a reference model or project model.

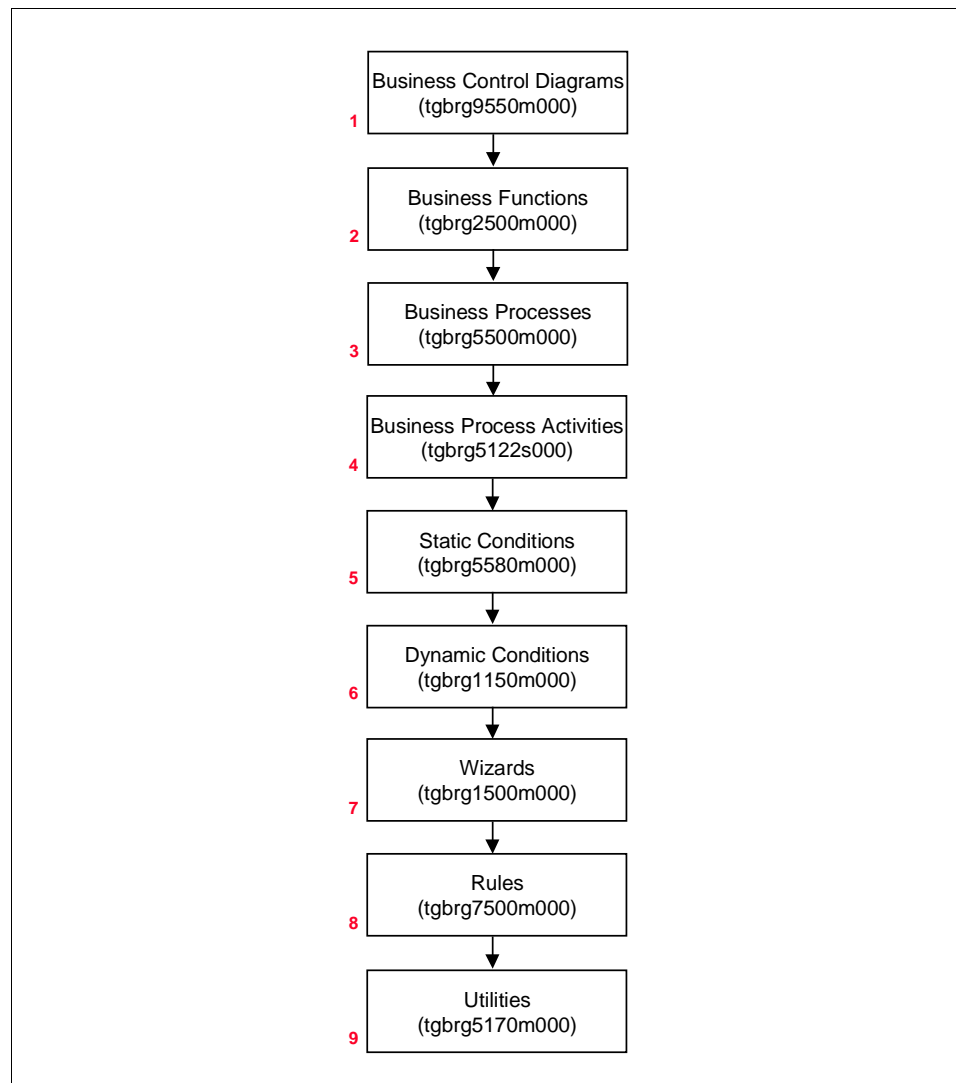


Figure 4, The repository procedure

**Step 1 Business-Control Diagrams (tgbrg9550m000)**

Use this session to maintain a library (repository) of business control diagrams. Based on the business-control diagram repository, you can create business-control models.

A business-control diagram:

- Visualizes the primary process that takes place in an enterprise unit/logistical company
- Indicates which business functions are used to control that primary process

The business functions in a business-control model can be linked to business functions in a business-function model.

An enterprise unit in the enterprise-structure model does not have a reference to a complete business-control model, but to one business-control diagram within a business-control model.

**Step 2 Business Functions (tgbrg2500m000)**

Use this session to maintain a library (repository) of business functions. You can create business function models based on the business function repository.

Business functions are implementation units of the Baan application, presented in business administration terms.

You can structure business functions in a hierarchical way by specifying a business function as a parent of another business function. The top of the structure is formed by the business function(s) to which you do not assign a parent.

**Example**

Example	
Business Function	Parent Business Function
A0	
A1	A0
A2	A0
A3	A1
A4	A1
A5	A2

**Note**

If you create business-function models you do not have to copy the business function structure from the repository. You can, for example, assign another parent to a business function in a business-function model.

**Step 3 Business Process (tgbrg5500m000)**

Use this session to maintain a library (repository) of business processes. Business processes are logistical processes that consist of activities such as Baan sessions or other business processes. Business processes are graphically represented by a chart of activities including states, arrows, and, possibly, decision moments or conditions. You can create business-process models based on the business-process repository.

#### Step 4 **Business-Process Activities (tgbrg5122s000)**

Use this session to specify the business-process activity details. You can only start this session from the DEM-Tool.

The session consists of three tabs of which tab two and tab three concern the Workflow Management System (WMS) module. For more information about workflow, see the UP046A US manual.

On tab one you can define, among other things:

- The activity type: The kind of activity an authorized Baan user can carry out.
- The session authorization: A role determines whether you are authorized to use a business process or business-process activity. If the role assigned to you authorizes you to use a certain business-process activity to which a session is linked, then the session authorization defines to what extent you can use this session. The authorization that is linked to a session is defined in the repository and can only be reduced in a project model or reference model.

The following activity types can be distinguished:

- Manual activity  
The activity is not linked to an application program.
- Business process  
The activity represents a process that is nested in another process (a nested process is a process in a process).
- Baan Session  
The activity represents a Baan session.
- Other application program  
A helper application. For more information, see the UP046A US manual.
- Control activity  
A decision moment in a process after which the process can be continued in several directions.
- Sending external trigger  
A business process that initiates another business process.

#### Step 5 **Static Conditions (tgbrg5580m000)**

Use this session to maintain static conditions. During the implementation of Baan, the static condition values are set on the basis of static-conditions. Static-conditions determine which parts of business processes are accessible for an end user. A condition is linked to an arrow that follows a control activity (decision box) in a process. The condition values activate or deactivate parts of a business process. Deactivated parts of a process are displayed in dimmed mode.

**Step 6 Dynamic Conditions (tgbrg1150m000)**

You can use this session to maintain dynamic conditions. Dynamic conditions are used by the workflow management system to dynamically check the value of a workflow attribute, and to decide which activity has to be executed. A dynamic condition is linked to a relationship, leaving a control.

Whether a dynamic condition applies is decided during the execution of a business process through workflow.

**Step 7 Wizards (tgbrg1500m000)**

Use this session to maintain wizards. Wizards are a special form of user assistance for automating tasks by means of user dialogs. You can link wizards to business functions to set the values of Baan application parameters. In contrast to parameter-setting rules (**see step 8**), wizards are used to set the values of all Baan application parameters. For more information about wizards, see the UP047A US manual.

**Step 8 Rules (tgbrg7500m000)**

Use this session to maintain rules. For the consistency rule both the IF and THEN part are specified in a text editor. For the other three types of rules only the IF part is specified in a text editor, the THEN part is entered in a subsession. There are four different types of rules:

**Consistency rule**

An expression containing a combination of business functions on the basis of which one or more other business functions must also be included in a reference or project model.

**Example****Example**

```
IF <BF,5> AND <BF,12>
THEN <BF,9>
```

**Explanation:**

If business function 5 and business function 12 are part of a reference model or a project model, business function 9 must also be part of the reference model or the project model.

**Parameter-setting rule**

An expression that determines the value of one or more parameters in a reference model or project model. The value is determined on the basis of a combination of business functions, business processes, and/or static conditions.

**Example****Example**

```
IF <BF,1> OR <BF,3>
THEN
Parameter:
tttld000.user User jjohnson
```

**Explanation:**

If business function 1 or business function 3 is part of the reference model or the project model, the value of the User parameter is jjohnson.

**Transformation rule**

An expression imposing a unilateral dependency of business processes in relation to business functions.

If specific business functions are present in a reference or project model, business processes are automatically incorporated in that reference model or project model.

**Example**

```
IF <BF,1> AND <BF,3>
```

```
THEN
```

```
DPL081 MRP Purchase Orders
```

Explanation:

If business functions 1 and 3 are part of the reference model or the project model, business process DPL081 must also be part of the reference model or the project model and can therefore be incorporated automatically.

**Static-condition**

An expression, containing a combination of business functions and/or business processes on the basis of which the value of static conditions is set in a reference or project model.

**Example**

```
IF <BF,1> OR <BF,3>
```

```
THEN
```

```
LTC LTC implemented Yes
```

Explanation:

If business function 1 or 3 is part of the reference model or project model, the value of the LTC static condition is Yes.

**note**

LTC is not a parameter. In some cases however, a similar parameter-setting rule will be created. For example: tccom000LTC = yes

**Step 9 Utilities (tgbrg5170m000)**

Use this session to maintain utilities. Utilities are collections of auxiliary sessions (for example, print and display sessions) that can be linked to a business process or activity but cannot be incorporated in the process because they are not a mandatory part of it.

## 3.2

### Optional sessions

This section describes the remaining optional sessions in the Repository business object.

#### **Performance Indicator by Business Function (tgbg2130m000)**

Use this session to link a performance indicator to a business function.

A performance indicator is a value that indicates the achievements of company units. The value varies by time unit (such as week and day) and is calculated by means of a script. If the value is a figure, it is displayed in a chart. If the value relates to a collection of data, it is stored in an ASCII file.

You can monitor and improve the performance of business functions by means of performance indicators.

#### **Subsessions by Activity (tgbg5123s000)**

Use this session to specify the authorizations for a subsession that is linked to a session activity.

Only specify the authorization for a subsession for which you do not want to apply the authorizations that are specified for the session that is linked to the activity.

#### **Sessions by Utility (tgbg5160m000)**

Use this session to maintain the sessions by utility.

On the **Specific** menu, choose **Import Sessions** to import a range of sessions. As a result, you need not insert every session separately.

#### **Import Range of Sessions (tgbg5161m000)**

Use this session to import a range of sessions into the Sessions by Utility (tgbg5160m000) session. As a result you do not have to insert every session separately in the previously mentioned session.

#### **Import Range of Utilities (tgbg5161mtmp)**

Use this session to create utilities based on data from the Sessions by Business Object (ttadv7110m000) session.

If you use this session, you do not have to create the utility yourself nor to link sessions to it in the following sessions respectively:

- The Utilities (tgbg5170m000) session
- The Sessions by Utilities (tgbg5160m000) session

A utility that is created in this way gets the same code as the business object from which it is derived.

Because utilities mostly consist of display or print sessions, you can indicate that you only want to construct the utility from these session types (session usage in business object).

**Note**

If you want to construct a utility from all sessions in a business object but one, you can remove that session from the list in the Sessions by Utility (tgbg5160m000) session. However, you must first run the current session.

Business object tgbg10000 Session:	Session usage in business object
tgbg1100s000	mandatory
tgbg1110m000	mandatory
tgbg1400m000	print
tgbg1420m000	print
tgbg1430m000	print

If you run the current session for print sessions only, Baan creates the following utility in the Utilities (tgbg5170m000) session.

Utility tgbg10000 Session by utility:
tgbg1400m000
tgbg1420m000
tgbg1430m000



## 4. Reference models

This chapter describes the procedures that can be distinguished in the Reference Modeling business object. The procedures contain mandatory sessions as well as some optional sessions. The remaining optional sessions are briefly described at the end of this chapter.

Before you can carry out the procedure steps that are described in this chapter you must first carry out the procedures that are described in the previous chapters.

It is not mandatory to maintain a reference model. You can build a project model (see the following chapter) without basing it on a reference model. However, you are recommended to base a project model on a reference model because Baan and its partners may already have built reference models for the line of business or business typology that reflects your organization. In that case you only have to make some adjustments instead of starting from scratch, thus saving you a great deal of time and money.

**Note**

For detailed information about the Enterprise Modeler Editor (EME), the editor commands, and the building blocks that you can use to build diagrams, see the U7066A US manual.

## 4.1

### The reference model main procedure

The objective of this procedure is:

- To build reference models based on components from the repository.

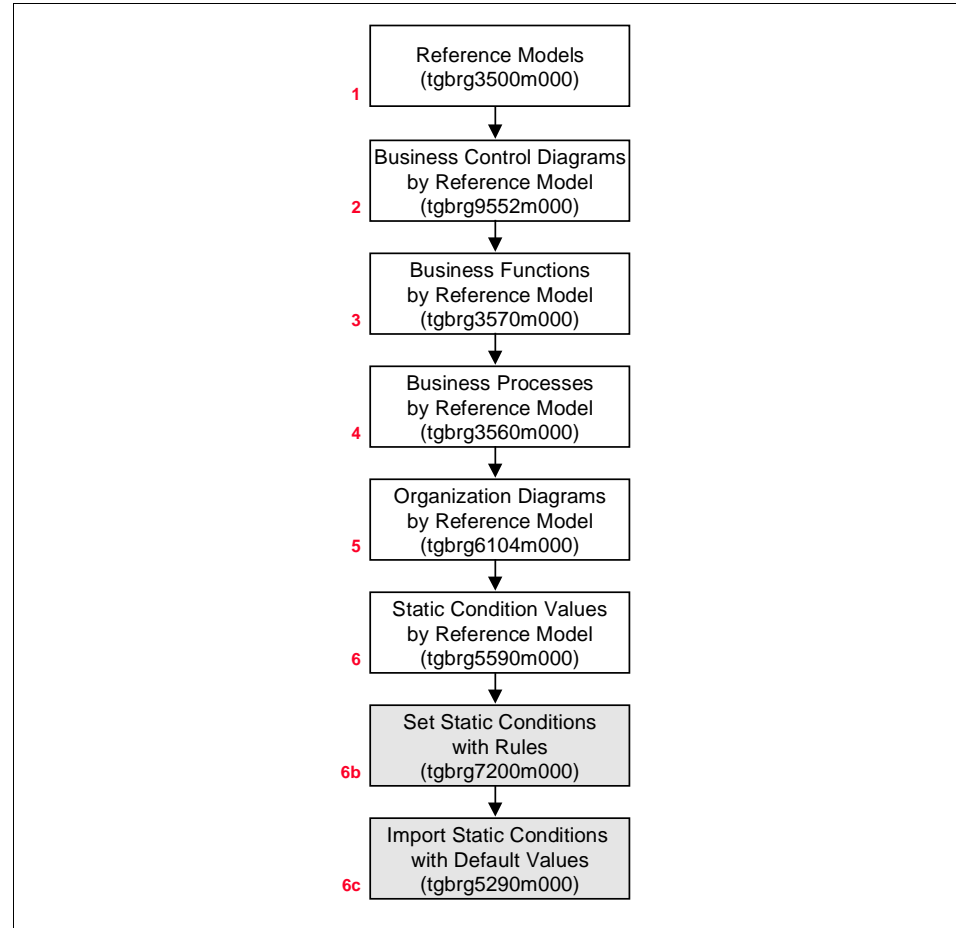


Figure 5, The reference model main procedure

#### Step 1 Reference models (tgbrg3500m000)

Use this session to maintain reference models. A reference model represents a line of business or business typology and can be built from libraries (repositories) of the following enterprise-modeler components:

- Business control diagrams
- Business function models
- Business process models
- Organization models

A reference model can serve as a basis for an organization-specific project model. On the other hand, although unusual, you can use a project model as a basis for a reference model if a project model happens to reflect the best-practice situation in a certain organization typology.

Carry out the following steps to import a project model in a reference model:

- 1 On the **Specific** menu, choose **Import Project Model** to start the Project Models (tgbrg4500m000) session.
- 2 Select the project model that you want to import and click **OK**.
- 3 Indicate which project-model components, such as business processes and static conditions, must be imported to the reference model and click **Import**.

## Step 2 Business Control Diagrams by Ref. Model (tgbrg9552m000)

Use this session to build a business control model from business control diagrams that you have initially created in the repository.

Double-click a business-control diagram to maintain the following data:

- **Sequence number**  
A number that determines the sequence in which records are displayed in an overview session or list box.
- **Business-control diagram category**  
A label used to classify a group of business control diagrams.

You can only maintain the remaining data in the Business-control diagram (tgbrg9550m000) session (repository).

### *note*

Keep in mind that changes to a business-control diagram in the repository apply to all reference and project models in which the diagram is included.

## Step 3 Business Functions by Reference Model (tgbrg3570m000)

Use this session to build a business function model from business functions that are initially created in the repository. When you insert a business function from the repository, the Options when Inserting a Business Function (tgbrg3270m000) session appears. If you select the **Also insert child business functions from the repository** check box, Baan also inserts all the business functions that are related (on lower levels) to the business function that you have selected. In this way you also copy (a part of) the business function structure from the repository to the reference model.

### *Example*

Business function	Parent business function
A0	
A1	A0
A2	A0
A3	A1
A4	A1
A5	A2

If you insert business function A0, business functions A1, A2, A3, A4, and A5 are also inserted, provided that you have indicated that you also want to insert child business functions.

Double-click a business function to maintain the following business function data:

- **External code**  
The code that indicates the position of that business function relative to other business functions.
- **Parent business function**  
The business function that is one level above the current business function.
- **Wizards**  
A special form of user assistance, which automates a task through a dialog with the user.

You can only maintain the remaining business function data in the Business Functions (tgbg2500m000) session (repository).

**note**

Keep in mind that changes to a business function in the repository apply to all reference and project models in which the business function is included.

**Step 4 Business Processes by Reference Model (tgbg3560m000)**

Use this session to build a business process model from business processes that are initially created in the repository.

Baan can select the business processes from the repository based on transformation rules. A transformation rule is an expression imposing a unilateral dependency of business processes in relation to business functions. If specific business functions are present in a reference model, business processes can automatically be incorporated in that reference model. You can maintain transformation rules in the Rules (tgbg7500m000) session.

Paths in business processes are activated or deactivated based on choices that you make during the implementation of the Baan software. You can define these choices in static-conditions, which you can maintain in the Rules (tgbg7500m000) session.

A static-condition is an expression, containing a combination of business functions and/or business processes in a reference model on the basis of which the value of static conditions is set in that reference model.

Double-click a business process to maintain the following business process data:

- **Sequence number**  
A number that determines the sequence in which records are displayed in an overview session or list box and components such as business processes are shown in the user menu (user dialog).
- **Subprocess**  
A process that is incorporated in another process (nested process), but is not shown in the user menu.

You can only maintain the remaining business process data in the Business Processes (tgbg5500m000) session (repository).

*note*

Keep in mind that changes to a business process in the repository apply to all reference and project models in which the business process is included.

### **Step 5 Organization Diagrams by Reference Models (tgbrg6104m000)**

Use this session to maintain organization diagrams. Because you cannot maintain a repository of organization diagrams, you can only create these diagrams directly in the reference model or project model.

Unlike business functions and business processes, organization diagrams are not a mandatory part of DEM<sup>SE</sup>. There is no enforced interdependency between business processes or business functions on the one hand and organization diagrams on the other hand. Nevertheless, it may be useful to define an organization diagram to visualize the organization structure and the roles and responsibilities of departments and employees.

In the project model you can link employees to the roles that you have defined for the reference-model specific organization diagram. The link between a role and an employee transforms a line-of-business oriented diagram into a company-specific (organization-specific) diagram.

### **Step 6 Static Condition Values by Reference Model (tgbrg5590m000)**

Use this session to set the value of the static conditions for the specified reference model. There are three ways to insert or set a static condition value:

- Manually (When the values of static conditions are set manually step 6b and step 6c of the main procedure are unnecessary).
- Choose **Set Static Conditions with Rules** on the **Specific** menu to start the Set Static Conditions with Rules (tgbrg7200m000) session (Reference model).
- Choose **Set Static Conditions to Default** on the **Specific** menu to start the Import Static Conditions with default values (tgbrg5290m000) session. (Concerns in particular project models).

#### **Step 6b Set Static Conditions with Rules (tgbrg7200m000)**

Use this session to apply the static-condition(s). A static-condition is an expression, containing a combination of business functions and/or business processes on the basis of which the value of static conditions is set.

#### **Step 6c Import Static Conditions with default values (tgbrg5290m000)**

Use this session to import a range of static conditions and their default values from the repository.

## 4.2

### The parameter procedure

The objective of this procedure is to set the BaanERP application parameters based on the implementation decisions that you make by means of the enterprise modeler (see figure 6). To reach the objective, you must first import the parameters and their current values in the active (current) company. Next, you must adjust the values for the reference model, version and company. You can either set the parameter values by means of parameter-setting rules or manually. Finally, the new parameter values must be exported to the BaanERP applications to bring them into conformity with the implementation decisions.

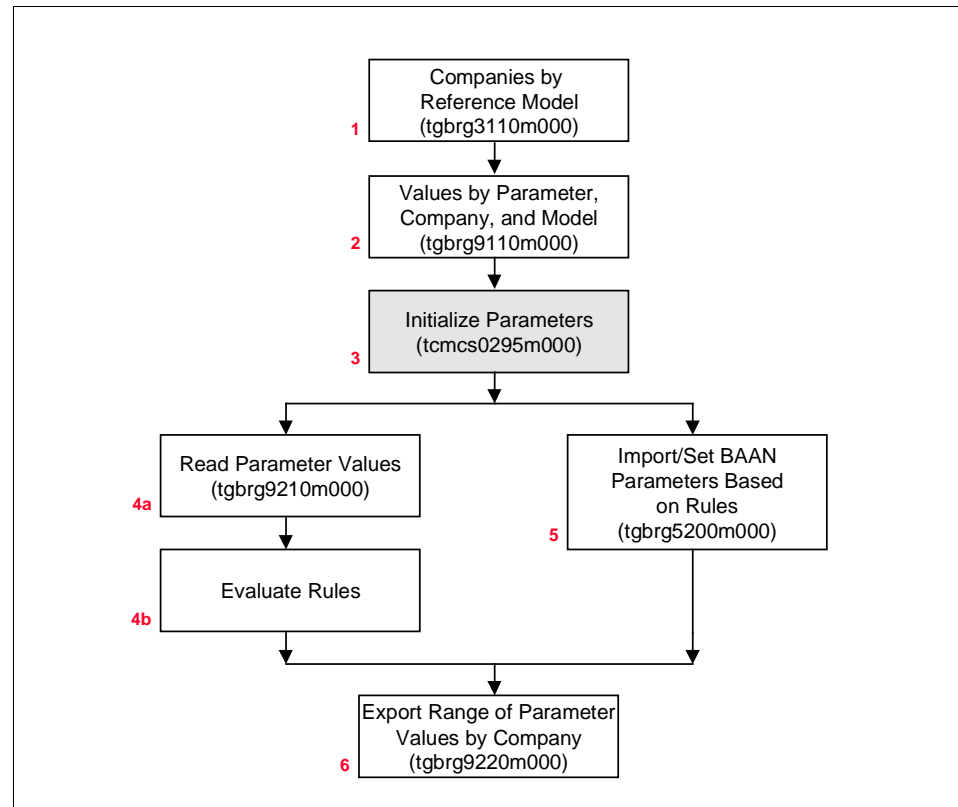


Figure 6, The parameter procedure

#### Step 1 Companies by Reference Model (tgbrg3110m000)

Use this session to link one or more companies to a reference model. A company is a separate (part of a) database containing such data as:

- Item codes and descriptions
- Order policy and order system for items
- Customer and supplier data
- Order procedures

You must define one or more companies for a reference model to be able to run the Values by Parameter, Company, and Model (tgbrg9110m000) session.

**Step 2 Values by Parameter, Company, and Model (tgbrg9110m000)**

Use this session to insert parameters one by one and to maintain their values for a combination of a company and a project model, or to view the results of step 4 and step 5 of the parameter procedure. If you do not want to insert the parameters one by one, select one of the following options on the **Specific** menu:

- **Read Parameter Values** to import a range of parameters (and their current values) from the BaanERP applications.
- **Evaluate Parameter-setting rules** to import and/or set the application parameters based on parameter-setting rules.

**Step 3 Initialize Parameters (tcmcs0295m000)**

This step is to be carried out only when a new company has been created. Before you insert parameters and their current values in the Values by Parameter, Company, and Model (tgbrg9110m000) session, you must carry out this step to make sure that the application parameters have a value at all. Baan assigns the default implementation values to the parameters. You can only set the parameter values for the active (current) company.

**Note**

It is inadvisable to initialize parameters for an operational company, as all parameters will be reset to their original default value.

**Step 4a Read Parameter values (tgbrg9210m000)**

Use this session to import a range of parameters (and their current values) from the BaanERP applications. As a result, the parameter values do not have to be set separately for each parameter in the Values by Parameter, Company, and Model (tgbrg9110m000) session. For parameters that you have inserted by means of this session, the value of the **Set by** field in the Values by Parameter, Company, and Model (tgbrg9110m000) session is set to **Database**.

**Step 4b Evaluate Rules**

Carries out the rule by evaluating the IF part and the THEN part of the rule.

- Transformation rule: Puts the business processes that are specified in the THEN part of the rule, in the business process model.
- Set static condition rules: Sets the value of the static condition per phase.
- Set parameter rules: Sets the values of the parameters according to the way in which they were specified in the THEN part of the rule.
- Consistency rule: Determines whether there are inconsistencies in the business function model.

**Step 5 Import/Set Baan parameters based on Rules (tgbrg5200m000)**

Use this session to import and/or set the application parameters based on parameter-setting rules.

If a parameter is already present in the reference model, only the parameter value is set, provided that the parameter is derived from a parameter-setting rule. (The same as step 4b).

If you select the **Test Run** check box, Baan will print the hypothetical outcome of the current session without actually importing the parameters or setting their values.

Select the **Purge Existing Model** check box to remove the parameters that are present in the reference model but would not have been inserted based on the parameter-setting rules if the session were empty.

#### Step 6 **Export Range of Parameter Values by Company (tgbg9220m000)**

Use this session to update the BaanERP application parameters based on the parameter values as specified in the Values by Parameter, Company, and Model (tgbg9110m000) session.

### 4.3

#### The roles procedure

The objective of this procedure is to define which roles are authorized to carry out which business process (activities).

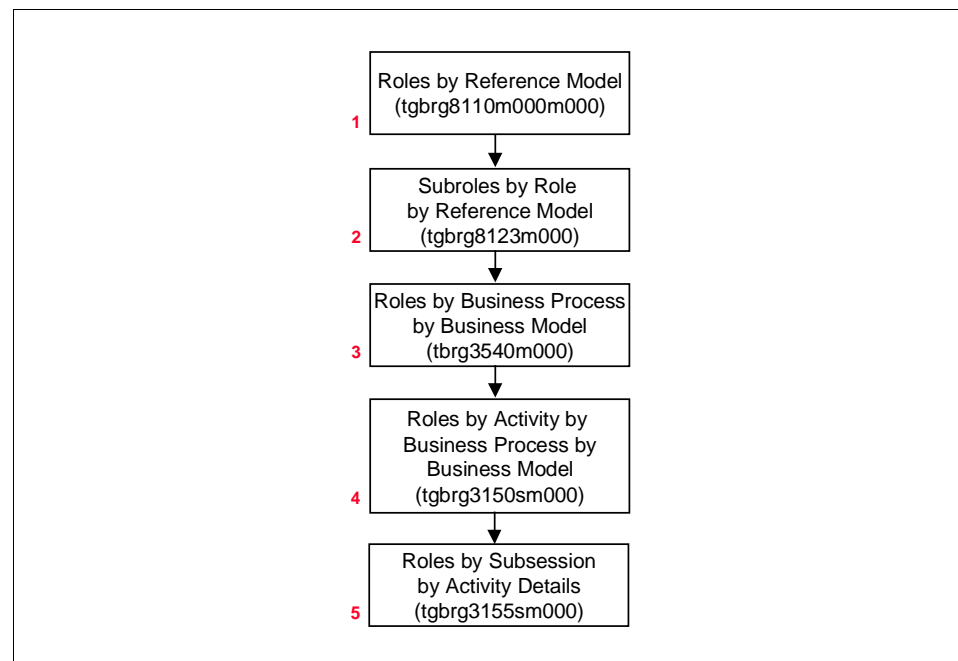


Figure 7, The roles procedure

**Step 1 Roles by Reference Model (tgbg8110m000)**

Use this session to link roles to a reference model. You must insert roles in the current session to be able to select roles in one of the following sessions:

- Subroles by Role by Reference Model (tgbg8123m000)
- Roles by Business Process by Business Model (tgbg3540m000)
- Roles by Activity by Bus. Process by Business Model (tgbg3150s000)
- Roles by Subsession by Activity Details (tgbg3155s000)

**Step 2 Subroles by Role by Reference Model (tgbg8123m000)**

Use this session to maintain the subroles of a role. A subrole is a regular role that is linked to another role on a level below the latter.

Subroles simplify the linking of roles to business processes and business process activities. A role does not have to be linked to activities if the role's subroles are linked to the activities that must be executable by the main role.

**Example**

Business Process:

```

Activity A (secretary role)
  |
Activity B (accountant role)
  |
Activity C (sales consultant role)

```

If the above roles are defined as subroles of the manager role, the manager role can execute all activities, even though that role is linked to none of the activities.

**Step 3 Roles by Business Process by Business Model (tgbg3540m000)**

Use this session to link a role to a business process. Roles that are linked to a business process are inherited by the lower levels such as activities and nested processes (a process that is incorporated as an activity in another process). If you do not want a role to apply to a particular activity or nested process, you must select the **Excluded** check box in the Roles by Activity by Business Process by Business Model (tgbg3150s000) session.

**Step 4 Roles by Act. by Bus. Process by Business Model (tgbg3150s000)**

Use this session to link a role to a business-process activity. Carry out the previous step if a role applies to all or most activities in a business process. As a result you:

- Do not have to link a role to those activities separately
- Only have to exclude the role from the activities to which it does not apply

So only use this session if you want to link a role to a limited number of activities or to exclude a role for some of the activities.

If you select the **Inherited** check box the role linked to the business process is also automatically linked to the business-process activity.

## Step 5 Roles by Subsession by Activity Details (tgbrg3155s000)

Use this session to maintain the authorizations for a combination of a role and a subsession. Subsessions are sessions that can be started from the original session that is activated from a Baan session activity-type.

The authorization that you assign cannot be larger than the authorization that you have defined in the **Session Authorization** field in the Business Process Activities (tgbrg5122s000) session (repository). For example, if you have assigned display authorization for the activity, you cannot assign modify authorization for a subsession of the activity.

## 4.4

### Using roles and authorization types

You can link roles and responsibilities to the following components:

- Reference models
- Project models
- Business processes
- Business process activities
- Organization units

You must first define roles as part of a reference model or of a project model before you can link those roles to any of the other components above. The reason for this is that the latter components are part of the former.

Assume that you link roles and responsibilities to business processes and activities. If for a certain process one role carries all the responsibilities for all activities, it is sufficient to link the role and the responsibilities to the process. Consequently, it is not necessary to define roles and/or responsibilities at the lower levels (activities) (since they are inherited). This is illustrated in the following example:

#### Example

Activities B, C, D, and E are incorporated in process A. Process A represents the highest level in the process structure. The other activities, which can also be nested processes, represent the lower levels in the process structure.

```

Level 0      A
             / \
Level 1      B  C
             |  |
Level 2      D  E
  
```

Roles:

- Manager
- Secretary

Responsibilities:

- Maintain data
- Informs manager
- Checks data

The manager is responsible for all process steps (activities) except activity E.

The secretary is only responsible for activity E of which she/he must inform the manager.

The manager checks activity E as soon as the secretary has executed the activity.

You can define the situation in the example as follows:

- 1 Select business process A in the Business Processes by Reference Model (tgbg3560m000) session.
- 2 Choose **Link Roles to Business Process** on the **Specific** menu to start the Roles by Business Process by Business Model (tgbg3540m000) session.
- 3 Choose **New** on the **File** menu to start the Roles by Business Process by Business Model (tgbg3140s000) session. Specify the type of session authorization for the activities in the business process that have sessions linked to them. Furthermore, you can specify responsibility codes. If you link one or more responsibility codes to a business process, at least one has to have **Execute Activity = Yes** to be able to use the business process
- 4 Link the manager role and the maintain data responsibility to process A. The role applies to process A and includes all lower-level activities because roles and responsibilities are inherited by the lower levels. Consequently, these roles and responsibilities do not have to be defined at the lower levels.
- 5 Close the Roles by Business Process by Business Model (tgbg3140s000) session.
- 6 Choose **Business Process Editor** on the **Specific** menu to start the Enterprise Modeler Editor (EME).
- 7 Select activity E and start the Roles by Activity by Business Process by Business Model (tgbg3150s000) session. Select the **Excluded** check box to exclude the manager role from activity E. Remove the **maintain data** responsibility and add the **checks data** responsibility. Link the secretary role to activity E. Also define the **maintain data** and **informs manager** responsibilities for that activity. (If you link one or more responsibility codes to a business-process activity, at least one has to have **Execute Activity = Yes** to be able to carry out the activity). In this session you can also specify or change the type of authorization for the session that is linked to the business-process activity.

**Note**

The type of session authorization only applies to Baan sessions. However, responsibility codes can still be used for other activity types (manual activities, business processes, application programs, sending external triggers) to grant or deny access to carry out that activity.



## 5. Project models

This chapter describes the procedures that can be distinguished in the Project Modeling business object. The procedures contain mandatory sessions as well as some optional sessions. The remaining optional sessions are briefly described at the end of this chapter.

Before you carry out the procedure steps that are described in this chapter, you must first carry out the procedures that are described in chapter 2.

Although you can build a project model from scratch, you are advised to base it on a reference model because Baan and its partners may already have built reference models for the line of business or business typology that reflects your organization. In that case, you only have to make some adjustments instead of starting from scratch.

### **Note**

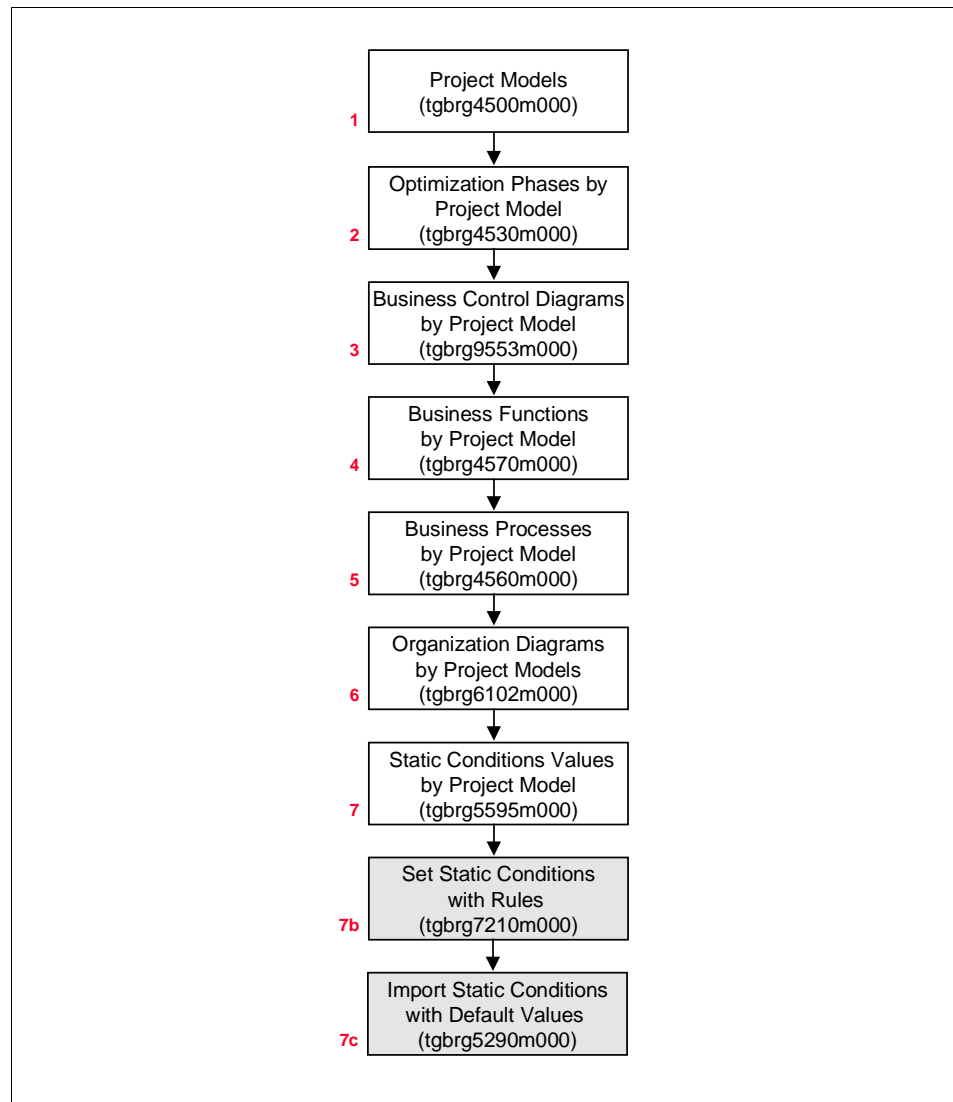
For detailed information about the DEM-Tool, the editor commands, and the building blocks that you can use to build diagrams, see the U7066A US manual.

### 5.1

## The project model main procedure

The objectives of this procedure are:

- To build project models based on reference-model components and/or directly from repository components.
- To define, by means of optimization phases, when a component such as a business function becomes active in a project model.
- To set the static-condition values for a project model. Static-conditions are parameters (always Yes or No) that determine the direction in which business processes are continued.



*Figure 8, The project model main procedure*

## Step 1 Project Models (tgbrg4500m000)

Use this session to maintain project models. A project model is a company-(organization) specific model that is either based on a reference model and/or built from libraries (repositories) of the following enterprise modeler components:

- Business control diagrams
- Business function diagrams
- Business process diagrams
- Organization models (not in repository)

You can build a project model directly from repository components or base it on a reference model and repository components. It only makes sense to base a project model on a reference model if the latter reflects the business typology of your organization.

Although unusual, you can also use a project model as a basis for a reference model if a project model happens to reflect the best-practice situation in your company.

Carry out the following steps to import a reference model into a project model:

- 1 On the **Specific** menu, choose **Import Reference Model** to start the Reference Models (tgbrg3500m000) session.
- 2 Select the reference model that you want to import and click **OK**.
- 3 Indicate which reference model components, such as business processes and static conditions, must be imported to the project model and click **Import**.

**Note**

Changes that you make to the reference model after you have imported it in to a project model do not affect the project model because you carried out a copy action.

**Step 2 Optimization Phases by project Model (tgbrg4530m000)**

Use this session to maintain the optimization phases by project model. An optimization phase is a phase in the business-improvement cycle in which a business function, business process, or organization diagram is implemented (active) in the organization. It does, however, not create any new business processes.

An optimization phase is delimited by a start date and an end date.

On the basis of the above data the optimization phases determine the operational transactions in a project model.

Because of the optimization phases, the enterprise modeler is called dynamic because a project model can be adapted to anticipated new business situations.

**Step 3 Business Control Diagrams by Proj. Model (tgbrg9553m000)**

Use this session to build a business control model from business-control diagrams that you have initially created in the repository.

Insert a business-control diagram from the repository and double-click it to maintain the following data:

- Sequence number  
A number that determines the sequence in which records are displayed in an overview session or list box.
- Business-control diagram-category  
A label you can give to a business-control diagram to distinguish and classify it.

You can only maintain the remaining data in the Business-Control Diagram (tgbrg9550m000) session (repository).

**note**

Keep in mind that changes to a business-control diagram in the repository apply to all reference and project models in which the diagram is included.

## Step 4 Business Functions by Project Model (tgbrg4570m000)

Use this session to:

- Build a business function model from business functions that you have initially created in the repository.
- Adjust a project business-function model that you have based on a reference business-function model by means of the **Import Reference Model** option on the **Specific** menu in the Project Models session (tgbrg4500m000).

The presence or absence of business functions during the implementation phase(s) of the BaanSeries software is used to:

- Select and configure business processes based on transformation setting rules. (See chapter 4)
- Set the BaanERP application parameters based on parameter-setting rules

When you insert a business function from the repository, the Options when Inserting a Business Function (tgbrg3270m000) session appears. If you select the **Also insert child business functions from the repository** check box, Baan also inserts all the business functions that are related (on lower levels) to the business function that you have selected. In this way you not only insert a business function but also copy (a part of) the business function structure from the repository to the project model.

### Example

Business function	Parent business function
A0	
A1	A0
A2	A0
A3	A1
A4	A1
A5	A2

If you insert business function A0, business functions A1, A2, A3, A4, and A5 are also inserted provided that you have indicated that you also want to insert child business functions.

The presence or absence of business functions during the implementation phase(s) of the BaanSeries software is used to:

- Select and configure business processes based on transformation setting rules
- Set the BaanERP application parameters based on parameter-setting rules

Double-click a business function to maintain the following business-function data:

- External code  
The code that indicates the position of that business function relative to other business functions.

- **Parent business function**  
The business function that is one level above the current business function.
- **Wizards**  
A special form of user assistance that automates a task through a dialog with the user.

You can only maintain the remaining business-function data in the Business Functions (tgbg2500m000) session (repository).

*note*

Keep in mind that changes to a business function in the repository apply to all reference and project models in which the business function is included.

### **Step 5 Business Processes by Project Model (tgbg4560m000)**

Use this session to build a business-process project-model from business processes that are initially created in the repository.

Baan can select the business processes from the repository based on transformation rules. A transformation rule is an expression that imposes a unilateral dependency of business processes in relation to business functions. If specific business functions are present in a project model, business processes can automatically be incorporated in that project model. You can maintain transformation rules in the Rules (tgbg7500m000) session.

Paths in business processes are activated or deactivated based on choices that you make during the implementation of the BaanSeries software. You can define these choices in static-conditions, which you can maintain in the Rules (tgbg7500m000) session.

A static-condition is an expression, containing a combination of business functions and/or business processes in a project model on the basis of which the value of static conditions is set in that project model.

Double-click a business process to maintain the following business process data:

- **Sequence number**  
A number that determines the sequence in which records are displayed in an overview session or in a list box and components such as business processes are shown in the user menu (user dialog).
- **Subprocess**  
A process that is incorporated in another process (nested process), but is not shown in the user menu.

You can only maintain the remaining business process data in the Business Processes (tgbg5500m000) session (repository).

*note*

Keep in mind that changes to a business process in the repository apply to all reference and project models in which the business process is included.

## Step 6 **Organization Diagrams by Project Models (tgbrg6102m000)**

Use this session to maintain organization diagrams. Because you cannot maintain a repository of organization diagrams, you can only create these diagrams directly in the reference model or project model.

Unlike business functions and business processes, organization diagrams are not a mandatory part of DEM<sup>SE</sup>. There is no enforced interdependency between business processes or business functions on the one hand and organization diagrams on the other hand. Nevertheless, it may be useful to define an organization diagram to visualize the organization structure and the roles and responsibilities of departments and employees.

You can link employees to an organization unit in the project model. Although you cannot link a role to an organization diagram (component) you can maintain the links between employees and roles in the Roles by Employee by Project Model (tgbrg8121m000) session.

The link between a role and an employee transforms a line-of-business oriented diagram into a company-specific (organization-specific) diagram.

## Step 7 **Static Condition Values by Project Model (tgbrg5595m000)**

Use this session to set the value of static conditions for the specified project model.

Static conditions are used to determine the direction in which a business process is continued. You can link a condition to an arrow following a control activity (decision box) in a process. The condition value activates or deactivates parts of a business process.

The static condition value (Yes or No) itself does not determine which part of a business process is activated or deactivated. It depends on the evaluation of the condition whether the outgoing path of a decision box is activated or deactivated. Select or clear the **Not** check box in the Condition (tgbrg5545m000) session to determine how the condition must be evaluated.

If the **Not** check box is cleared and the value of the condition is **Yes**, the condition is evaluated as true.

If the **Not** check box is cleared and the value of the condition is **No**, the condition is evaluated as false.

If the **Not** check box is selected and the value of the condition is **No**, the condition is evaluated as true.

If the **Not** check box is selected and the value of the condition is **Yes**, the condition is evaluated as false.

A condition that is evaluated as true activates (a part of) a process, which will be highlighted in the process diagram. This is done to indicate that this (part of the) process is to be carried out.

A condition that is evaluated as false deactivates (a part of) a process, which will appear dimmed in the process diagram. This is done to indicate that this (part of the) process is not to be carried out.

**Note**

The effect of highlighting and dimming is only visible in the display mode of the process editor or the user menu (user dialog).

There are three ways to insert or set a static condition:

- Manually (one by one). (When the values of static conditions are set manually step 7b and 7c are unnecessary).
- Choose **Set Static Conditions with Rules** on the **Specific** menu to start the Set Static Conditions with Rules (tgbrg7210m000) session (Project Model).
- Choose **Set Static Conditions to Default** on the **Specific** menu to start the Import Static Conditions with Default Values (tgbrg5295m000) session.

**Step 7b Set Static Conditions with Rules (Proj. Model) (tgbrg7210m000)**

Use this session to apply the static-condition(s). A static-condition is an expression, containing a combination of business functions and/or business processes on the basis of which the value of static conditions is set.

**Step 7c Import Static Conditions with Default Values (tgbrg5290m000)**

Use this session to import a range of static conditions and their default values from the repository.

**5.2****The parameter procedure**

The objective of this procedure is to set the BaanERP application parameters based on the implementation decisions that you make by means of DEM<sup>SE</sup>. To reach the objective, you must:

- First, import the parameters and their current values in the active (current) company.
- Next, you must adjust the values for the project model, version and company. You can either set the parameter values by means of parameter-setting rules or manually.
- Finally, the new parameter values must be exported to the BaanERP applications to bring them into conformity with the implementation decisions.

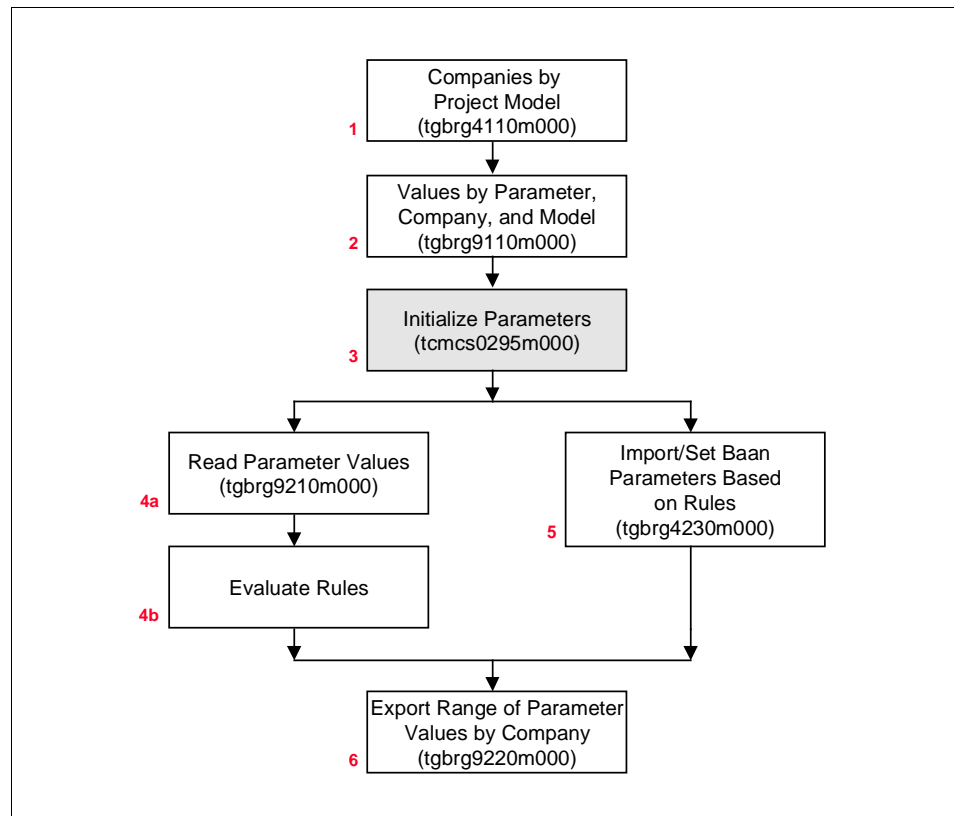


Figure 9, The parameter procedure

### Step 1 Companies by Project Model (tgbrg4110m000)

Use this session to link one or more companies to a project model. A company is a separate (part of a) database containing such data as:

- Item codes and descriptions
- Order policy and order system for items
- Customer and supplier data
- Order procedures

You must define one or more companies for a project model to be able to run the Values by Parameter, Company, and Model (tgbrg9110m000) session.

### Step 2 Values by Parameter, Company, and Model (tgbrg9110m000)

Use this session to insert parameters one by one and maintain their values for a combination of a company and a project model, or to view the results of step 4 and step 5. If you do not want to insert the parameters one by one, choose one of the following options on the **Specific** menu:

- **Read Parameter Values** to import a range of parameters (and their current values) from the BaanERP applications.
- **Evaluate Parameter-Setting rules** to import and/or set the application parameters based on parameter-setting rules.

**Step 3 Initialize Parameters (tcmcs0295m000)**

This step is to be carried out only when a new company has been created. Before you insert parameters and their current values in the Values by Parameter, Company, and Model (tgbg9110m000) session, you must carry out this step to make sure that the application parameters have a value at all. Baan assigns the default implementation value to the parameters. You can only set the parameter values for the active (current) company.

**Note**

It is inadvisable to initialize parameters for an operational company as all parameters will be reset to their original default values.

**Step 4a Read Parameter Values (tgbg9210m000)**

Use this session to import a range of parameters (and their current values) from the Baan applications. As a result, the parameter values do not have to be set for each parameter separately in the Values by Parameter, Company, and Model (tgbg9110m000) session. For parameters that you have inserted by means of this session, the value of the **Set by** field in the Values by Parameter, Company, and Model (tgbg9110m000) session is **Database**.

**Step 4b Evaluate rules**

Executes the rule by evaluating the IF part and the THEN part of the rule.

- Transformation rule: Puts the business processes that are specified in the THEN part of the rule, in the business-process model.
- Set static condition rules: Sets the value of the static condition per phase.
- Set parameter rules: Sets the values of the parameters according to the way in which they were specified in the THEN part of the rule.
- Consistency rule: Determines whether there are inconsistencies in the business-function model.

**Step 5 Import/Set Baan Parameters Based on Rules (tgbg4230m000)**

Use this session to import and/or set the application parameters based on parameter-setting rules.

If a parameter is already present in the reference model, only the parameter value is set provided that the parameter is derived from a parameter-setting rule.

If you select the **Test Run** check box, Baan prints the hypothetical outcome of the current session without actually importing the parameters or setting their values.

Select the **Purge Existing Model** check box to remove the parameters that are present in the project model but would not have been inserted based on a parameter-setting rule.

**Step 6    Export Range of Parameter Values by Company (tgbrg9220m000)**

Use this session to update the Baan application parameters based on the parameter values as specified in the Values by Parameter, Company, and Model (tgbrg9110m000) session.

## 5.3

**The roles/employees/user dialog procedure**

The objective of this procedure is to define which employees are allowed to carry out which business process (activities). The link between an employee and a business process (activity) is effectuated indirectly by means of a link between a role and a business process (activity). The last step of this procedure is to generate a User Dialog. A User Dialog is a Browser that either shows roles, business processes, or Baan sessions that apply to specific employees based on their roles.

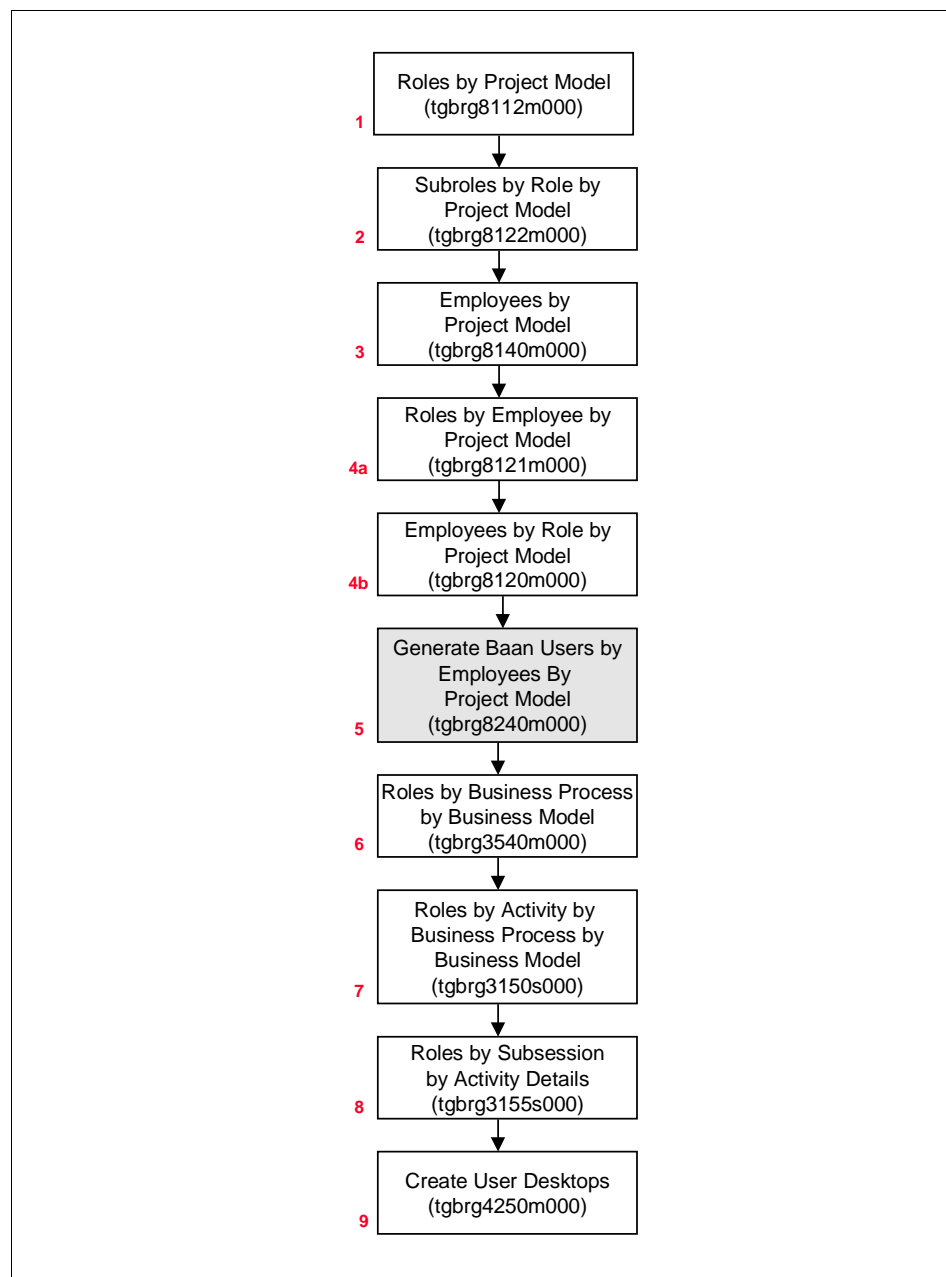


Figure 10, The roles/employees/user dialog procedure

**Step 1 Roles by Project Model (tgbrg8112m000)**

Use this session to define roles for a project model. You must insert roles in the current session to be able to select roles in one of the following sessions:

- Subroles by Role by Project Model (tgbrg8122m000)
- Employees by Role by Project Model (tgbrg8120m000)
- Roles by Business Process by Business Model (tgbrg3540m000)
- Roles by Activity by Bus. Process by Business Model (tgbrg3150s000)
- Roles by Subsession by Activity Details (tgbrg3155s000)

**Step 2 Subroles by Role by Project Model (tgbrg8122m000)**

Use this session to maintain the subroles of a role. A subrole is a regular role that is linked to another role on a level below the latter.

Subroles simplify the linking of roles to business processes and business process activities. A role does not have to be linked to activities if the role’s subroles are linked to the activities that must be carried out by the main role.

**Example**

Business process:

Activity A (secretary role)  
 |  
 Activity B (accountant role)  
 |  
 Activity C (sales consultant role)

If the above roles are defined as subroles of, for example, the manager role, the manager can execute all activities, even though that role is linked to none of the activities.

**Step 3 Employees by Project Model (tgbrg8140m000)**

Use this session to link an employee to a project model (variant of step 1) and/or to specify an employee as a Baan user.

If an employee must be able to execute a Baan session, you must link a Baan user to this employee.

A Baan user can be linked to an employee only once in a project model.

If you have defined multiple Baan users for one system logon (see the **User** field in the User Data (ttams1100s000) session, you can link employees to these different Baan users who use the same system logon to enter the system.

Employee	Baan user	System logon
hjohnson	johnson1	hjohn
hjohnson	johnson2	hjohn

Baan can generate a Baan user for an employee. The system logon identification is inserted in the current session as well as in the **User** field in the User Data (ttams1100s000) session.

**Note**

Baan only generates a Baan logon identification and not the data that is needed to be able to logon to the system.

**Step 4a Roles by Employee by Project Model (tgbrg8121m000)**

Use this session to link a role to an employee (variant of step 3).

Because you can link roles to business processes and activities, an employee is (can be) indirectly linked to a business process (activity).

The combination of this data is used to create a personal menu by means of the Generate User Dialog (tgbrg4250m000) session.

**Step 4b Employees by Role by Project Model (tgbrg8120m000)**

Use this session to link an employee to a role.

If you want to link a role to a business-process activity of the Baan session type, you must link the employee to a Baan user. Otherwise the employee cannot execute the activity. For more information, see the Employees by Project Model (tgbrg8140m000) session.

Because you can link roles to business processes and activities, an employee can be indirectly linked to a business process (activity).

The combination of this data is used to create a personal menu by means of the Generate User Dialog (tgbrg4250m000) session.

**Note**

Instead of linking a role to a project model and subsequently linking an employee to that role, you can also do it the other way round (see the following two steps).

**Step 5 Generate Baan Users by Empl. by Proj. Model (tgbrg8240m000)**

Carry out the following optional subprocedure to generate a Baan user :

- 1 Start the Employees by Project Model (tgbrg8140m000) session.
- 2 Insert a new record to start the Employees by Project Model (tgbrg8140s000) session.
- 3 In the **Employee** field, define an employee.
- 4 Leave the **Baan User** field empty.
- 5 Leave the **System Logon** field empty.
- 6 Save the data and exit the session.
- 7 Select the record you have just created and start the Generate Baan users by Employee by Project Model (tgbrg8240m000) session from within the Employees by Project Model (tgbrg8140m000) session.
- 8 Click **Generate**.

When you carry out the procedure, Baan creates a Baan user .

**Example**

When someone with system logon jsmith creates employee hjohnson, the system logon and other data is used from jsmith.

The result of the procedure will be:

Employee	Baan user	System logon
hjohnson	hjohnson	jsmith

The **User Type** field in the User Data (ttams1100s000) session is set to **Normal User**.

The Baan user will be the same as the employee you have defined. The system logon is based on the logon code of the person (user) who carried out the above procedure.

**Note**

You can also link an existing Baan user and/or an existing system logon to an employee. Start the User Data (ttams1100s000) session to find out whether a Baan user and/or a system logon already exists.

**Note**

If you link both an existing Baan user AND an existing system logon, you can omit this subprocedure. However, if you only link an existing system logon, Baan must still generate the Baan user.

**Step 6 Roles by Business Process by Business Model (tgbrg3540m000)**

Use this session to link a role to a business process. Roles that are linked to a business process are inherited by the lower levels such as activities and nested processes (a process that is incorporated as an activity in another process). If you do not want a role to apply to a particular activity or nested process, you must select the **Excluded** check box in the Roles by Activity by Business Process by Business Model (tgbrg3150s000) session.

**Step 7 Roles by Act. by Bus. Process by Business Model (tgbrg3150s000)**

Use this session to link a role to a business-process activity. Carry out the previous step if a role applies to all or most activities in a business process. As a result you:

- Do not have to link a role to those activities separately
- Only have to exclude the role from the activities to which it does not apply

So only use this session if you want to link a role to a limited number of activities or to exclude a role for some of the activities.

If you select the **Inherited** check box the role that is linked to business process is automatically also linked to the business-process activity.

**Step 8 Roles by Subsession by Activity Details (tgbrg3155s000)**

Use this session to maintain the authorizations for a combination of a role and a subsession. Subsessions are sessions that can be started from the original session that is activated from a Baan session activity type.

The authorization that you assign cannot be larger than the authorization that you have defined in the **Session Authorization** field in the Business Process Activities (tgbrg5122s000) session. For example, if you have assigned **Display** authorization for the activity, you cannot assign **Modify** authorization for a subsession of the activity.

### Step 9 **Create User Desktops (tgbrg4250m000)**

Use this session to generate a menu structure from a specific project model and optimization phase (optional).

If you select the **Entire Structure** check box, Baan generates a menu that contains all business processes, sessions, or roles that are incorporated in the project model, without respecting the roles.

If you clear the **Entire Structure** check box, Baan generates a menu that only contains processes, sessions, or roles that apply to the employee based on his/her roles.

#### **Note**

It depends on the value of the **User Interface** field whether the menu entries are processes, sessions, or roles.

The code of the menu that is generated is stored in the User Data (ttams1100s000) session which you can start from the User Data (ttaad2500m000) session. In case of a dynamic menu browser only the start up program changes, and not the menu because that is not stored.

## 5.4

### **Using roles and authorization types**

You can link roles and responsibilities to the following components:

- Reference models
- Project models
- Business processes
- Business process activities
- Business functions
- Organization units

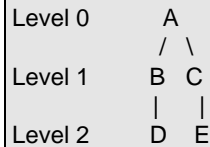
You must first link roles to a reference model or a project model before you can link those roles to any of the other components above. The reason for this is that these components are part of the reference model or project model.

Assume that you link roles and responsibilities to business processes and activities. If, for a certain process one role carries all the responsibilities for all activities, it suffices to link the role and the responsibilities to the process. Consequently, it is not necessary to define roles and/or responsibilities at the lower levels (activities) (since they are inherited).

This is illustrated in the following example:

### Example

Activities B, C, D, and E are incorporated in process A. Process A represents the highest level in the process structure. The other activities, which can also be nested processes, represent the lower levels in the process structure.



#### Roles:

- Manager
- Secretary

#### Responsibilities:

- Maintain data
- Informs manager
- Checks data

The manager is responsible for all process steps (activities) except activity E.

The secretary is only responsible for activity E of which she/he must inform the manager.

The manager checks activity E as soon as the secretary has carried out the activity.

You can define the situation in the example as follows:

- 1 Select business process A in the Business Processes by Project Model (tgbrg4560m000) session.
- 2 Select **Link Roles to Business Process** on the **Specific** menu to start the Roles by Business Process by Business Model (tgbrg3540m000) session.
- 3 Choose **New** on the **File** menu to start the Roles by Business Process by Business Model (tgbrg3140s000) session. Specify the type of session authorization for the activities in the business process that have sessions linked to them. Furthermore, you can specify responsibility codes. If you link one or more responsibility codes to a business process, at least one has to have **Execute Activity = Yes** to be able to use the business process.
- 4 Link the manager role and the maintain data responsibility to process A. The role applies to process A including all lower-level activities because roles and responsibilities are inherited by the lower levels. Consequently, these roles and responsibilities do not have to be defined at the lower levels.
- 5 Close the Roles by Business Process by Business Model (tgbrg3140s000) session.
- 6 Choose **Business Process Editor** on the **Specific** menu to start the DEM-Tool.

- 7 Select activity E and start the Roles by Activity by Business Process by Business Model (tgbg3150s000) session. Select the **Excluded** check box to exclude the manager role from activity E. Remove the **maintain data** responsibility and add the **checks data** responsibility. Link the secretary role to activity E. Also define the **maintain data** and **informs manager** responsibilities for that activity. (If you link one or more responsibility codes to a business-process activity, at least one has to have **Execute Activity = Yes** to be able to carry out the activity). In this session you can also specify or change the type of authorization for the session that is linked to the business-process activity.

**Note**

The type of session authorization only applies to Baan sessions. However, responsibility codes can still be used for other activity types (manual activities, business processes, application programs, sending external triggers) to grant or deny access to carry out that activity.



## 6. Enterprise-structure modeling

This chapter describes the main procedure in the Enterprise-Structure Modeling (ESM) business object. The procedure contains mandatory sessions as well as some optional sessions. The remaining optional sessions are briefly described at the end of this chapter.

### **Note**

An enterprise-structure model is graphically represented by an enterprise-structure diagram, in which the supply chain at enterprise level is modeled.

For detailed information about the DEM-Tool, the editor commands, and the building blocks that you can use to build diagrams, see the U7066A US manual.

### 6.1

## Enterprise-structure model procedure

The objective of this procedure is to define an operational enterprise-structure model, which is an enterprise-structure model from a specific version that reflects your current organization (enterprise) (see figure 11).

In the enterprise-structure diagram, the supply chain is modeled at enterprise level. All participants (enterprise units) in the supply chain are graphically represented on a map.

### **Example**

Example of participants (enterprise units):

- Customers
- Sales offices
- Distribution centers
- Assembly sites
- Manufacturing sites
- Suppliers
- Central planning/purchasing sites

Between enterprise units all kinds of relationships can exist in term of goods flows, financial flows, and information flows.

The enterprise units from this specific enterprise-structure model are the direct link between the BaanERP application data, such as a warehouse or an entity on the one hand and the model on the other hand.

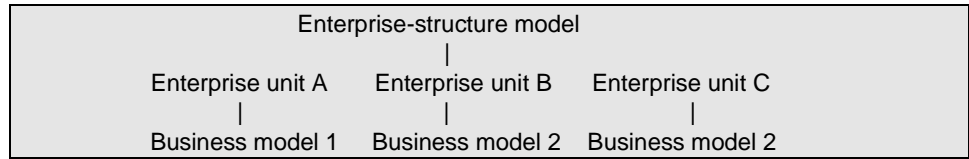
As opposed to business processes, and business-function diagrams and so on, an enterprise-structure diagram is not part of a business model (reference model or project model).

A business model, on the contrary, is linked to an enterprise unit, which is part of an enterprise-structure diagram.

The enterprise-structure model is the top level of an enterprise model.

One level below the enterprise-structure model you find business models (reference or project models). Business models can be linked to enterprise units. This implies that the enterprise unit is the indirect link between an enterprise-structure model and multiple business models.

**Example**



In the example, two different business models (1 and 2) are linked to one enterprise-structure model through three different enterprise units.

Because a business model is used to set parameters at Baan company level, only one business model must be used to represent one Baan company. Therefore enterprise unit A and B (see the example above) must be part of two different logistic companies. Obviously you can still use one business model to configure several companies.

You cannot directly create an operational enterprise-structure model. First you must create one or more enterprise-structure models, after which you can specify one of those models as the operational model. At runtime the operational enterprise-structure model is used by the applications to determine prices and currencies when goods are transferred from one enterprise unit to another.

There are two different types of enterprise-structure models:

- Reference enterprise-structure model: A generic enterprise-structure model that represents a certain branch of industry. (A reference enterprise-structure model is however not used often, as it is quite difficult to create a generic model that represents all parts of an organization).
- Enterprise-structure model: A model that is built for one specific company.

You can directly create a (specific) enterprise-structure model or base it on a (more generic) reference enterprise-structure model.

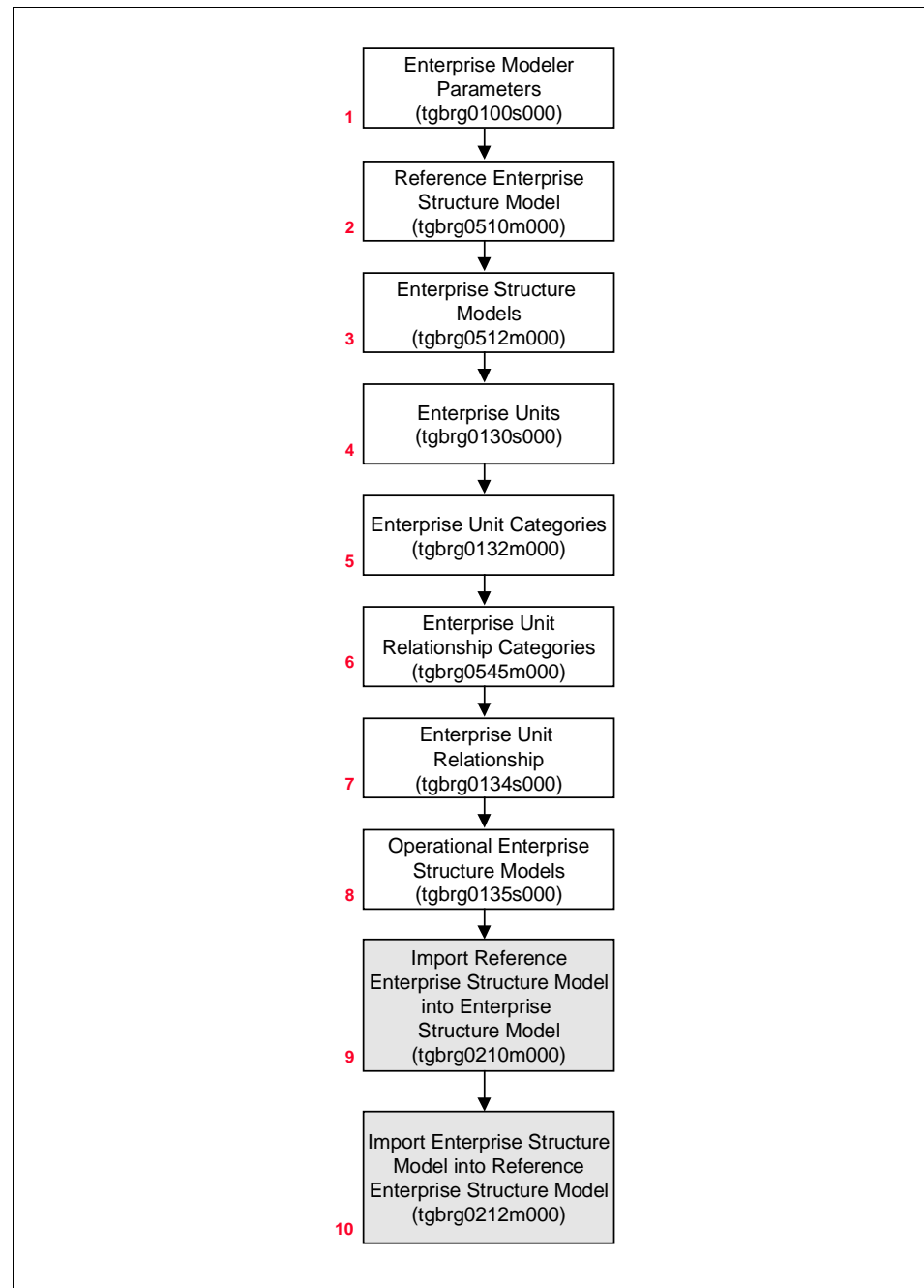


Figure 11, The enterprise-structure model procedure

### Step 1 Enterprise Modeler Parameters (tgbg0100s000)

Use this session to indicate the company in which Baan must store the enterprise-structure models. If you do not specify a company, you cannot use any enterprise-structure model.

Do not select a company other than a company that is linked to your current package combination.

After you have defined or changed a company, a question appears. If you answer that question in the affirmative, the same storage company is automatically defined in all companies that are linked to your package combination.

**Example**

Package combination:	B50new.
Companies linked to the package combination:	100, 101, 102.
Storage company :	101
This means that the enterprise-structure models are stored in company 101, no matter in which company you work.	

**Step 2 Reference Enterprise-structure model (tgbrg0510m000)**

Use this session to maintain reference enterprise-structure models, which you can use as a basis for a (specific) enterprise-structure model. Technically there is no difference between both model types.

If you want to model your own organization you can start with step 3.

**Step 3 Enterprise-structure models (tgbrg0512m000)**

Use this session to maintain enterprise-structure models. You can either create an enterprise-structure model from scratch or choose **Import Reference Enterprise Model** on the **Specific** menu to base it on a reference enterprise-structure model.

**Step 4 Enterprise Units (tgbrg0130s000)**

Use this session to maintain enterprise units. An enterprise unit is a part of an (multinational) enterprise that:

- Has its own financial responsibility towards the overall enterprise (organization).
- Is confined to one country because it is linked to one financial company.
- Consists of a set of entities (parts of the BaanERP application, such as warehouses or departments).
- Constitutes, together with other enterprise units, a logistic company.
- Can either be a site (part of your enterprise) or an external business partner (supplier or customer of a site) that does not use the Baan software.

**Note**

A site does not mean that one enterprise unit is the complete physical site. Several enterprise units of the site type can represent different financial units that are located at the same physical site.

Logistical units are not limited to borders of countries. Entities of logistical units (such as warehouses) can refer to different enterprise units, using different currencies, which they derive from the enterprise unit to which they are linked.

In the **Business Model** field you can select a business model that indirectly specifies the software that is used for the control of the business in a defined part (enterprise unit) of an enterprise (organization). Indirectly, this means that the BaanERP applications are parameterized and tuned on the basis of the business processes that are included in the business model.

In the **Business-control diagram** field you can select a business-control diagram that reflects the primary flow of the enterprise unit. The primary flow is the core business of the enterprise unit. The unit contributes to the realization of the product(s) made by the entire enterprise (organization).

Enterprise (organization):	Enterprise unit:
Car manufacturer	Engine manufacturer

You can only select a business-control diagram that is incorporated in the business model that you have selected in the **Business Model** field.

### Step 5 **Enterprise Unit Categories (tgbrg0132m000)**

Use this session to maintain enterprise unit categories. You can link an enterprise unit category to an enterprise unit to indicate whether the enterprise unit represents a site, a customer, or a client and to specify the icon that is used for the enterprise unit on the map.

#### **Note**

An enterprise unit can only be added to a model in the DEM-Tool if the enterprise unit categories have already been defined.

### Step 6 **Enterprise-unit relationship Categories (tgbrg0545m000)**

Use this session to maintain enterprise-unit relationship-categories. An enterprise-unit relationship-category is:

- An identification of the sort of flow that is going from one enterprise unit to another

Four types of order flow can be distinguished:

- Document flow
- Goods flow
- Money flow
- Order flow

#### **Note**

Currently only goods flows are supported by BaanERP.

You can link this category to an enterprise-unit relationship to specify the relationship (see step 4).

### Step 7 **Enterprise-unit relationship (tgbrg0134s000)**

Use this session to define the connection (represented by an arrow) between two enterprise units.

Indicate the date when the relationship comes into force (effective date) and the date when the relationship is expired.

Specify a relationship category to indicate the type of arrow and the sort of flow that is going from one unit to another.

**Step 8 Operational Enterprise-structure models (tgbrg0135s000)**

Use this session to indicate which enterprise-structure model from a specific version reflects your current organization (enterprise).

**Step 9 Import Reference Enterprise-structure model into Enterprise-structure model (tgbrg0210m000)**

Use this optional session if you want to base an enterprise-structure model on a reference enterprise-structure model instead of building it from scratch.

You can make a selection of enterprise units that must be imported.

**Step 10 Import Enterprise-structure model into Reference Enterprise-structure model (tgbrg0212m000)**

Use this optional session if you want to base a reference enterprise-structure model on an enterprise-structure model instead of building it from scratch. This step is less common than the previous step, because this means that you derive a (more) generic model from a (more) organization specific model.

You can make a selection of enterprise units that must be imported.

## 6.2

### Optional sessions

You can use the following optional sessions in the enterprise-structure model procedure.

- Enterprise Units (tgbrg0530m000)  
Use this session to select enterprise units. If you started this session by zooming, you can only find and select a record.
- Report sessions:
  - Print Enterprise Unit Categories (tgbrg0432m000)
  - Print Enterprise-Unit Relationship Categories (tgbrg0445m000)
  - Print Reference Enterprise-Structure Models (tgbrg0410m000)
  - Print Enterprise-Structure Models (tgbrg0412m000)