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SDA Reuse Best Practices

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5 Aug 04

Agenda

- Software Development Asset (SDA) concepts
- SDAs within a Service-Oriented Architecture
  - Internal
  - External (B2B)
- SDA reuse best practices
- SDA management/governance case study
- Logidex introduction

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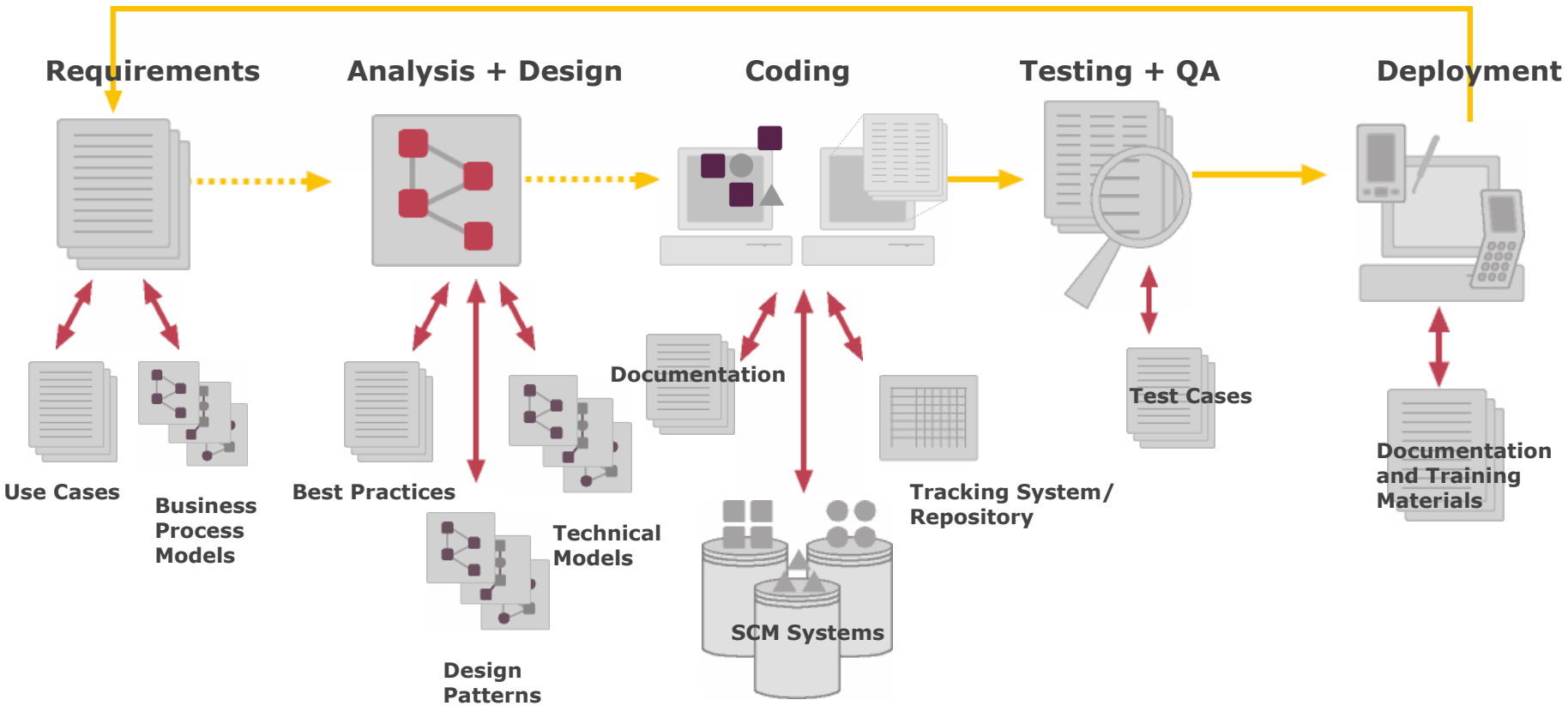
SDA Concepts

What is an SDA?

- An SDA is "something of value to an IT organization," including:
  - **Knowledge** assets
    - Architectures
    - Best practices and processes
    - Design patterns
    - …
  - **Executable** assets
    - Web services
    - Data views
    - Components
    - Applications
    - …
- SDAs are composed of ***metadata***, such as:
  - **Artifacts:** work products, such as code, schemas, models, executable modules, …
  - **Classifiers:** searchable and reportable values such as keywords, development effort, owner, language, …
  - **Relationships to other assets:** dependencies, prerequisites, other asset versions, …

SDA Development Lifecycle



Managing SDAs in Context

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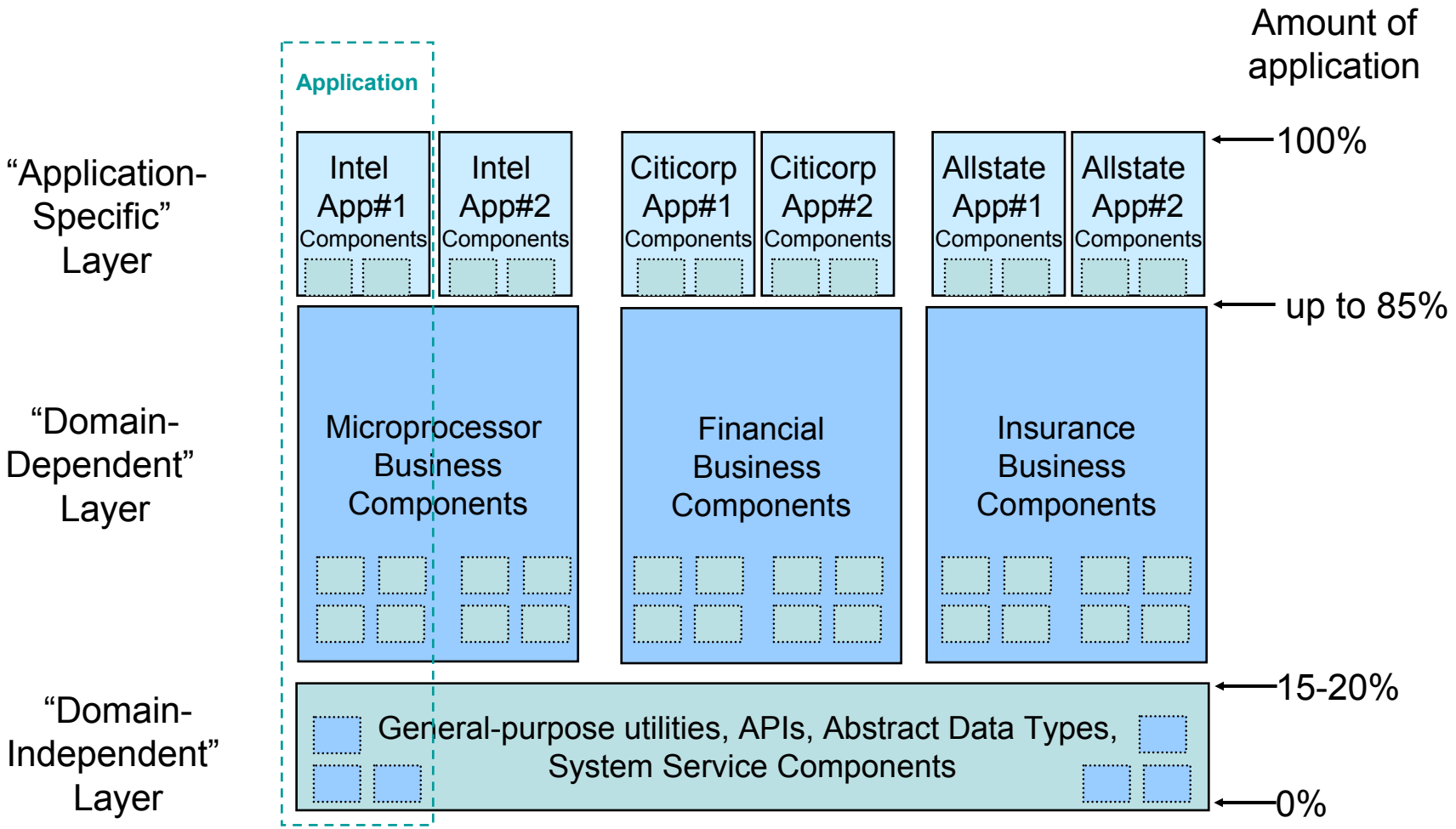
- SDAs live in multiple contexts:
  - Application Context
  - Technical Context
  - Business Context
  - Deployment Context
- The first three contexts are directly relevant to the software development lifecycle
- Linking deployment context to development contexts is becoming increasingly important
  - Web services management
  - Maintenance/deployment lifecycles

Three Classes of SDAs



SDAs Within a Service-Oriented Architecture

SOA Concepts

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- What is service-oriented architecture?
  - Definition and delivery of core application functions through a series of coarse-grained services meant to be assembled through a message-oriented infrastructure
  - **Strongly conducive to SDA reuse**
- Not all Web services fit into an SOA
  - e.g., fine-grained RPC-type services
- Not all SOAs use Web services technology
  - e.g., guaranteed messaging using message-oriented middleware (MOM) technology
- Services may be implemented using a variety of techniques
  - COM/.NET/J2EE components, integration server adapters, …

Making Sense of Services within an SOA

To be effective, services within an SOA must be:

- Derived from ***business requirements***
  - Typically expressed as business processes
- Sufficiently ***coarse-grained*** to:
  - Enable workflow-oriented assembly
  - Maximize work-to-overhead ratio
- Be placed into ***business*** and ***technical context***
  - Managed definition to avoid redundancy
  - Managed implementation to ensure best practices are being followed

SDAs within an SOA

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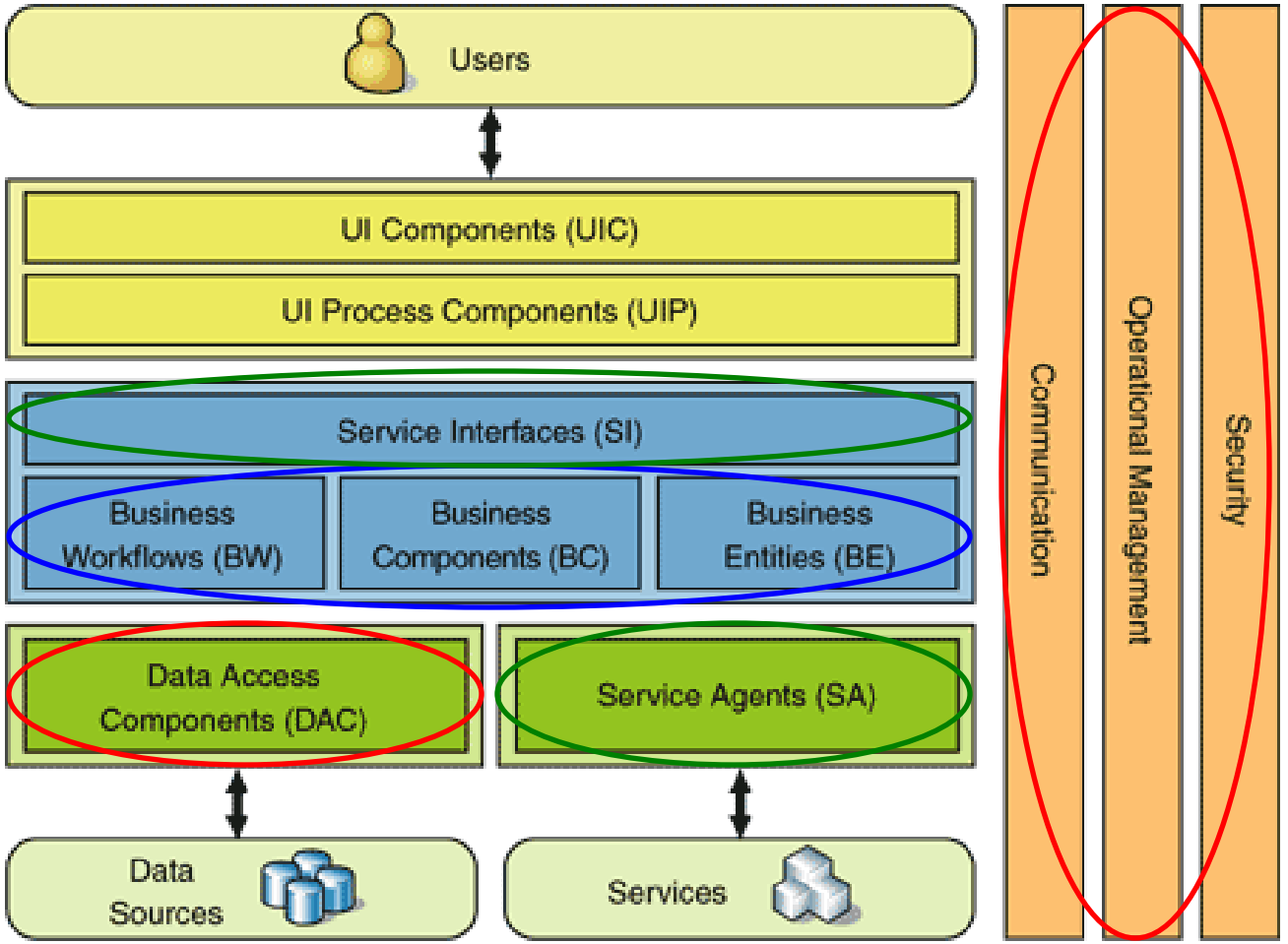
SDAs are key building blocks within an SOA

- Services themselves are SDAs
  - Meant to be published and consumed
  - Need to be managed over their typically multi-versioned lifecycle
- … and services consume other SDAs
  - Other services
  - Components (both business and technical)
  - Legacy APIs
  - Knowledge assets (e.g., Enterprise Solution Patterns, such as Service Interface and Service Gateway)
  - …

Sample Technical Context: .NET



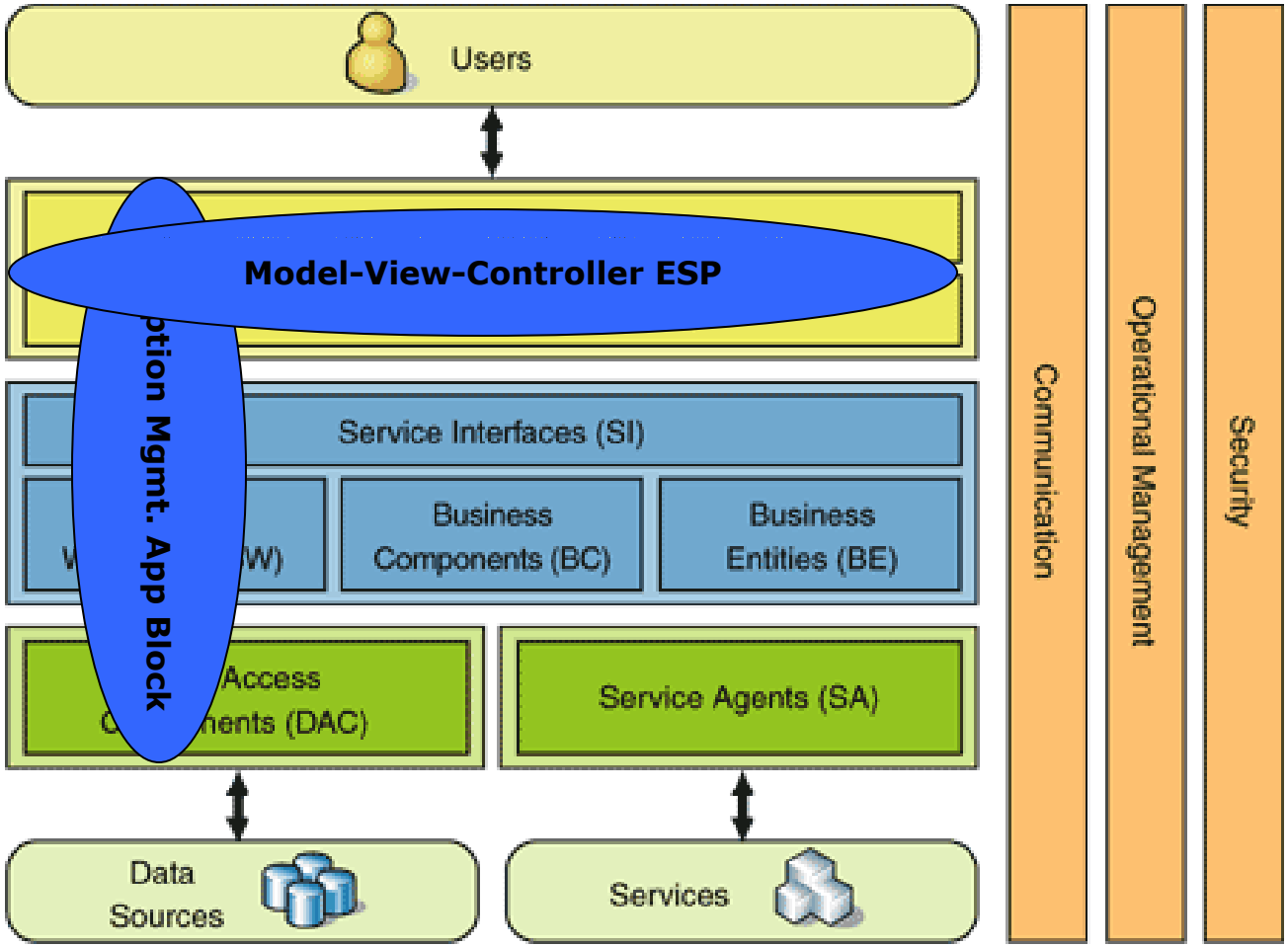
Business Services

Business Components

Technical Components

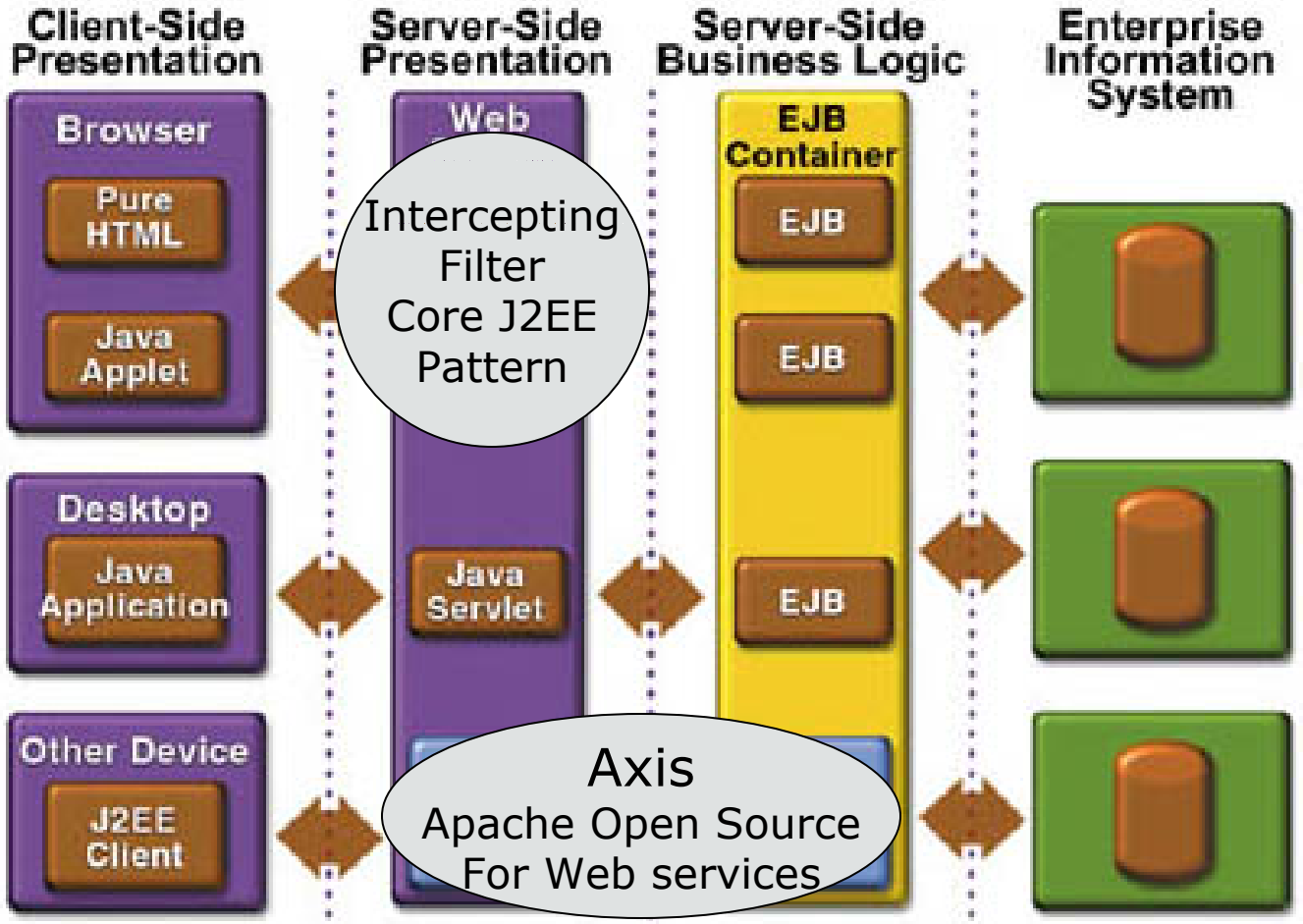
* http://msdn.microsoft.com/architecture/patterns/

.NET SDA Examples



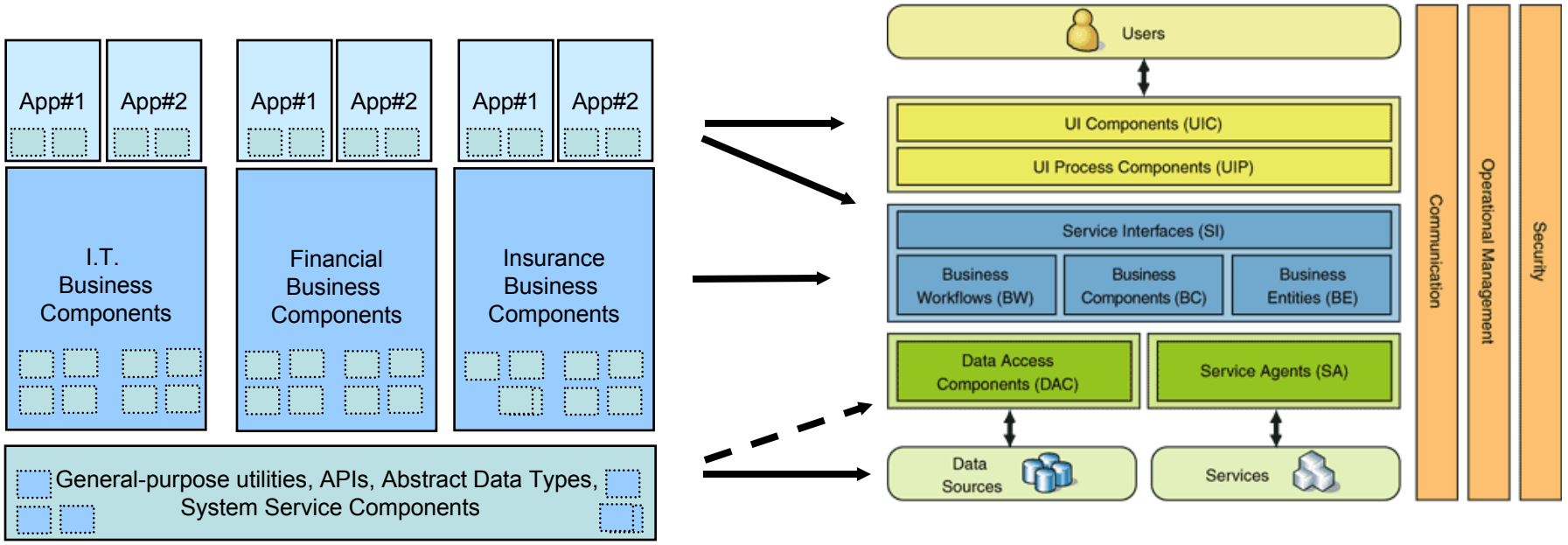
* http://msdn.microsoft.com/architecture/patterns/

Sample Technical Context: J2EE

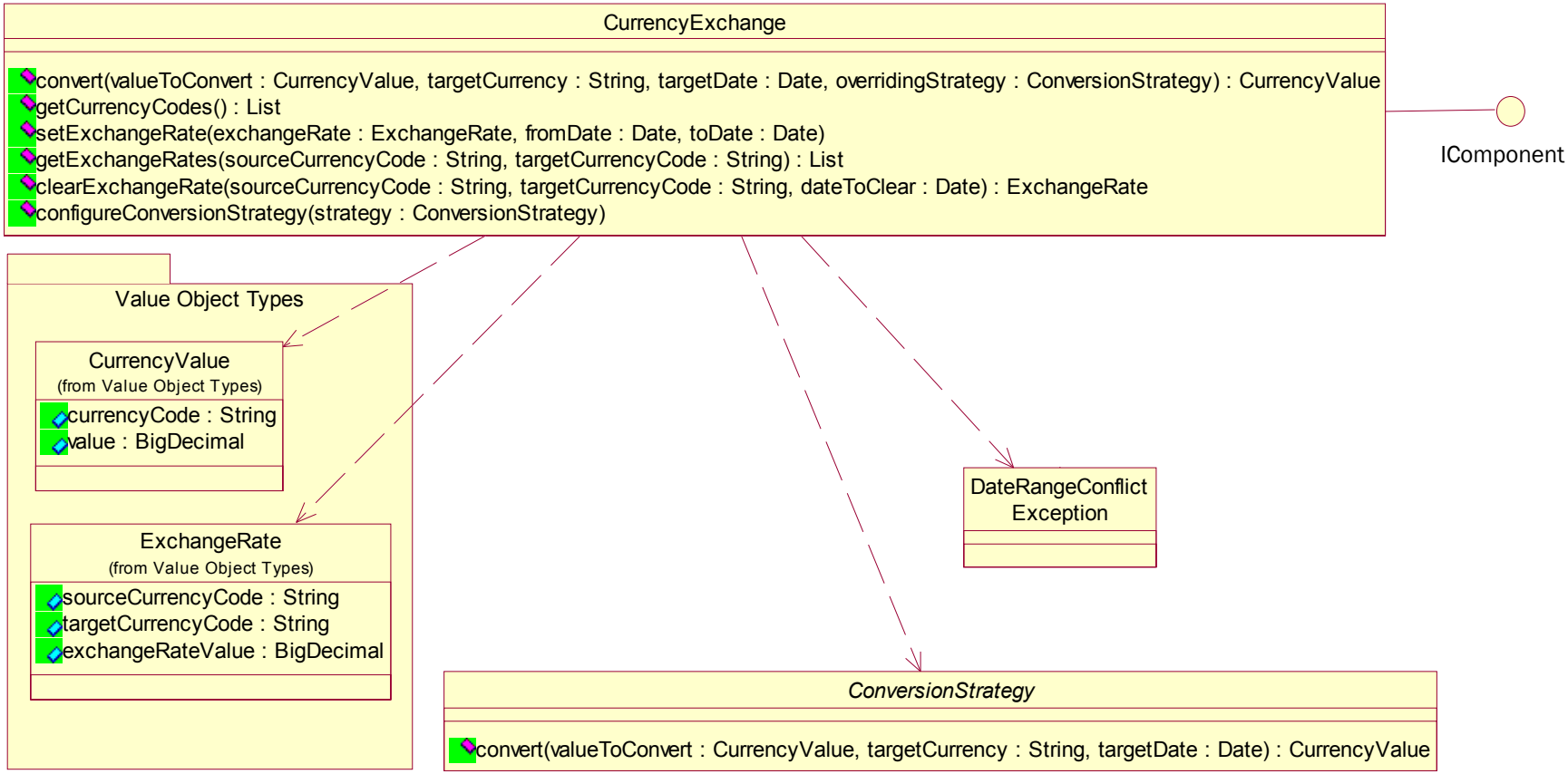


* http://java.sun.com

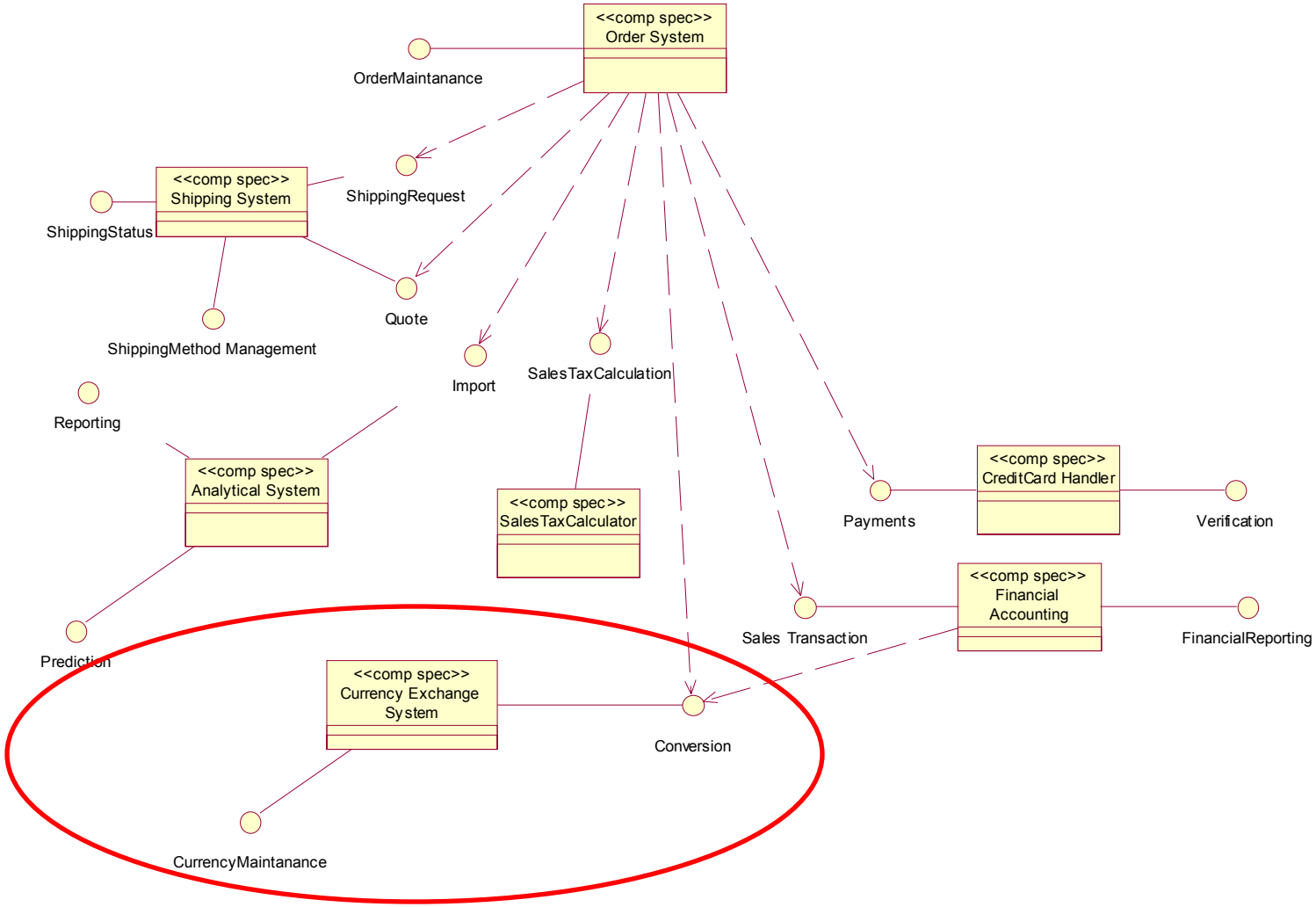
Mapping SDA Classes to the .NET Technical Context



An Example SDA: CurrencyExchange Component



Our SDA's Business Context: e-Commerce

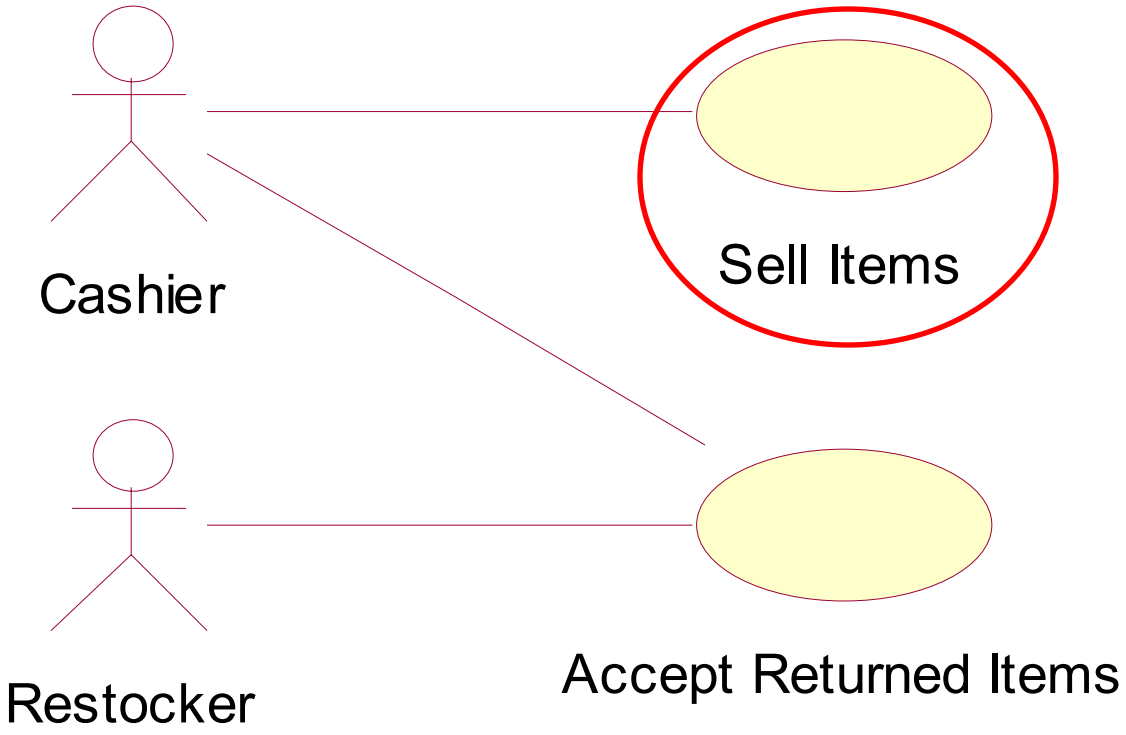


Business Context Elements

- Primary UML construct is class diagram laying out coarse-grained reference components/services
- Other UML constructs to consider:
  - Use Cases
    - Establish initial requirements for business function
      - Actors
      - Preconditions
      - Functional scenario / use case steps
  - Activity Diagrams
    - Describe detailed process or subprocess flow underlying a use case
    - Specific activities can be mapped to functional capabilities to be implemented as Web services

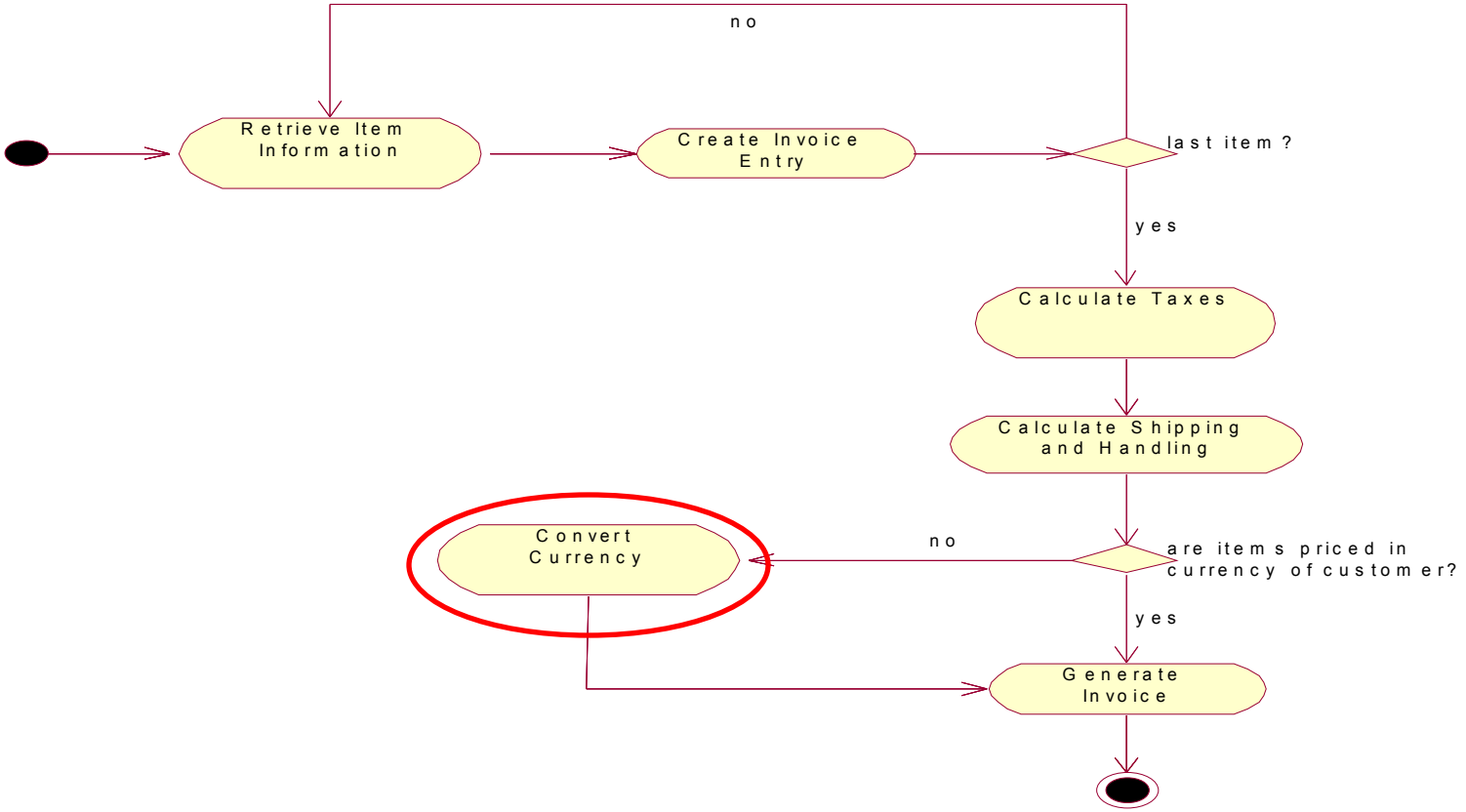
Expanding Our Business Context

- Sample Use Case Diagram



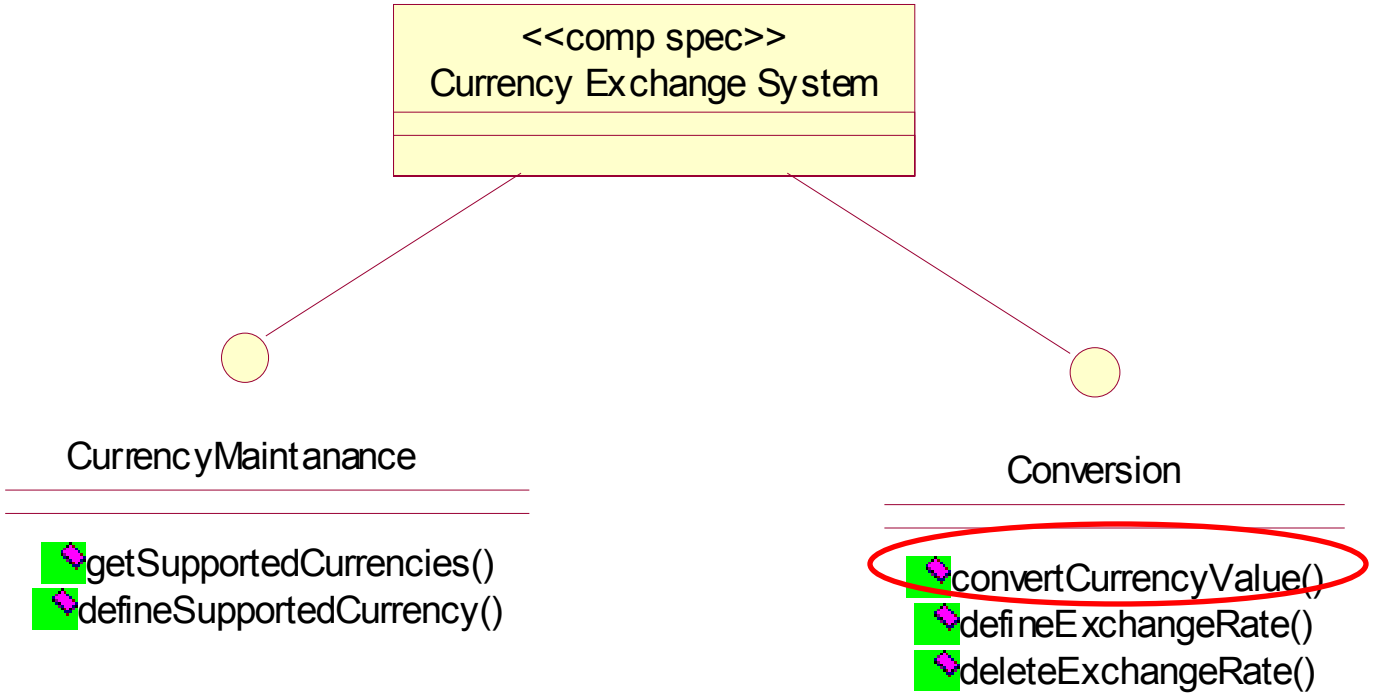
Expanding Our Business Context...

- Drilling into Sell Items Activity Diagram...



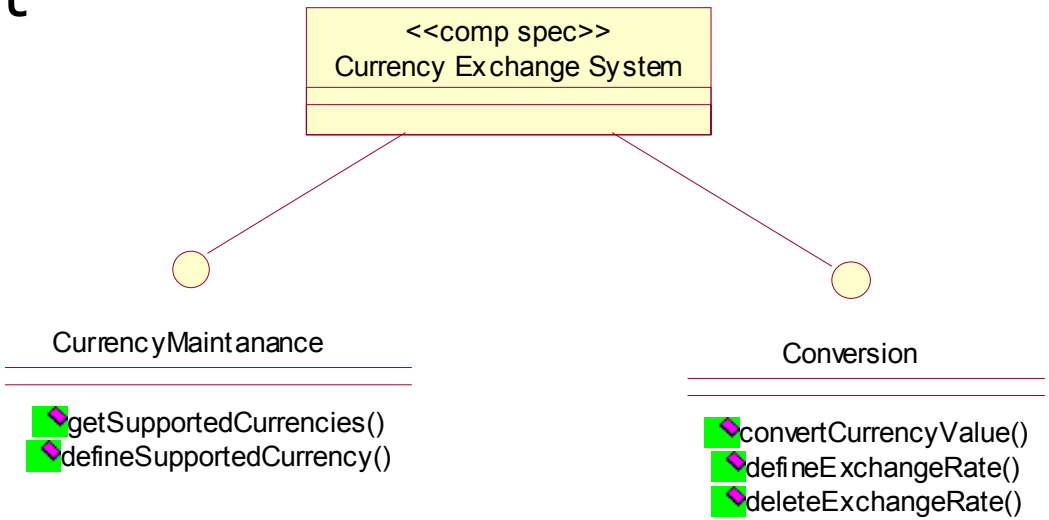
Expanding Our Business Context...

- Associating Convert Currency Activity with Component…



Putting our SDA into Business Context

- Returning to our component model…
  - Map our reference component to our example asset



Reference Component operation	Component method
getSupportedCurrencies	getCurrencyCodes
defineSupportedCurrency	no direct equivalent
convertCurrencyValue	convert
defineExchangeRate	setExchangeRate
deleteExchangeRate	clearExchangeRate

A Business Process Example: RosettaNet

- What is RosettaNet?
  - "RosettaNet is a consortium of major Information Technology, Electronic Components, Semiconductor Manufacturing and Telecommunications companies working to create and implement industry-wide, open e-business process standards. These standards form a common e-business language, aligning processes between supply chain partners on a global basis."

From RosettaNet's home page at www.rosettanet.org

Why Is RosettaNet Interesting?

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- Prasad Rampalli, Intel's IT Architect:
  - "We have championed the whole B2B commerce space with a lingua franca based on the RosettaNet standard. It is based on an XML messaging format and has a sufficient level of encryption to enable secure B2B conversations with the multitudes of trading partners that we've got."

    From Dec 15, 2002 ZDNet interview

    http://techupdate.zdnet.com/techupdate/stories/main/0,14179,2901716,00.html

Emerging Business Process Standards

- Significant industry movement away from EDI towards standardized, XML-based business process and messaging definitions
  - Web services is accelerating this trend
- Other examples of business process standards:
  - ACORD: insurance
  - IFX: financial services
  - ebXML: electronic business/trading

Emerging Business Process Standards

- Advantages:
  - Can learn from industry best practices and experience
    - XML-based message sets
    - Standard data dictionaries
    - Reference business processes
  - Packaged applications are adopting standards as they move towards Web service-oriented APIs

Besides, your business partners are probably already doing something here and will take you with them – whether you like it or not!

- Intel: "…13 percent of all our machine-to-machine, B2B transactions today are happening through the (RosettaNet) standard – roughly 30,000 transactions a month."

Back to RosettaNet...

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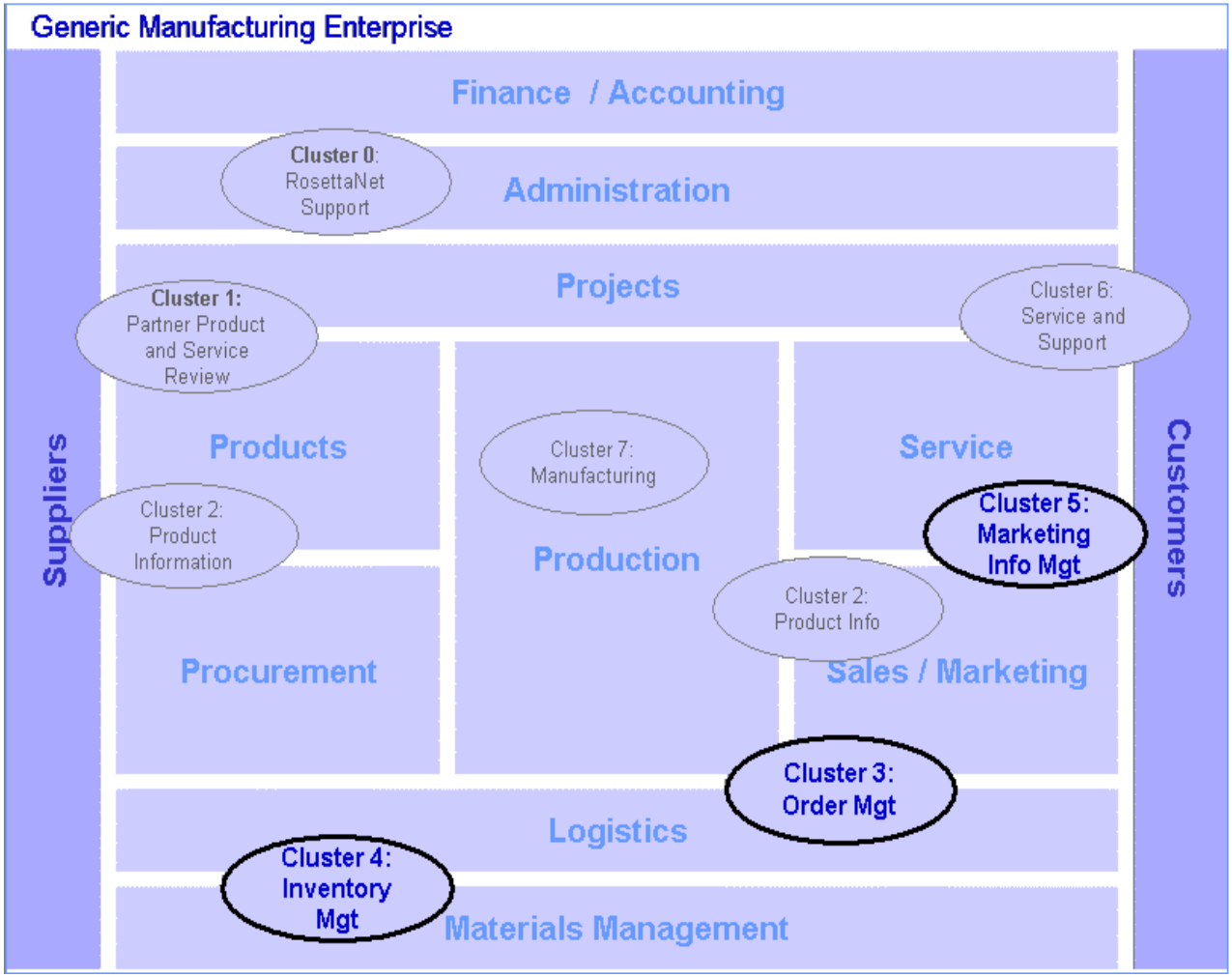
- Composed of Clusters, Segments, and Partner Interface Processes (PIPs)

- Example:
  - Cluster 3: Order Management
    - Segment 3C: Returns and Finance
      - PIP 3C3: Notify of Invoice

Drilling Into Our Example...



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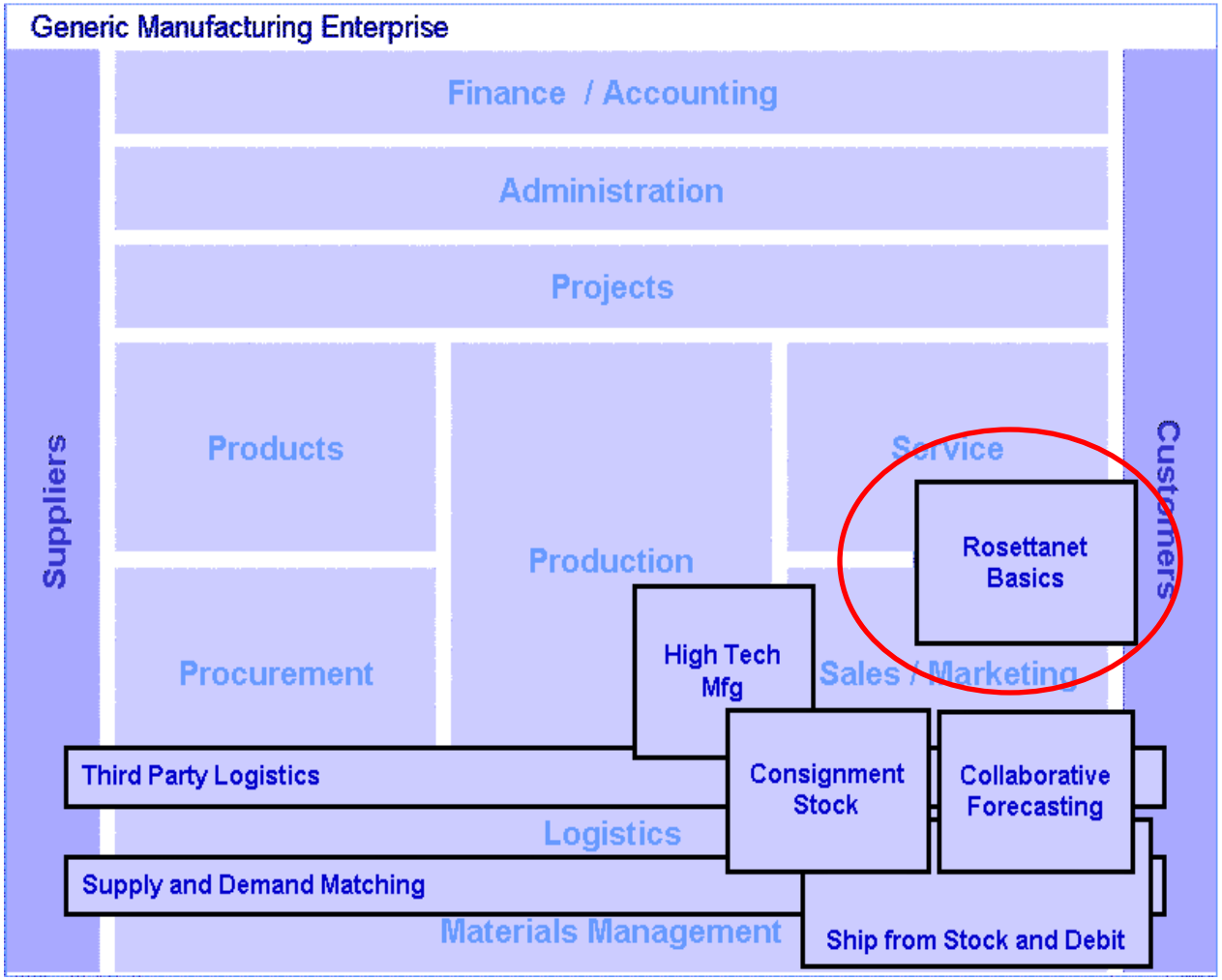

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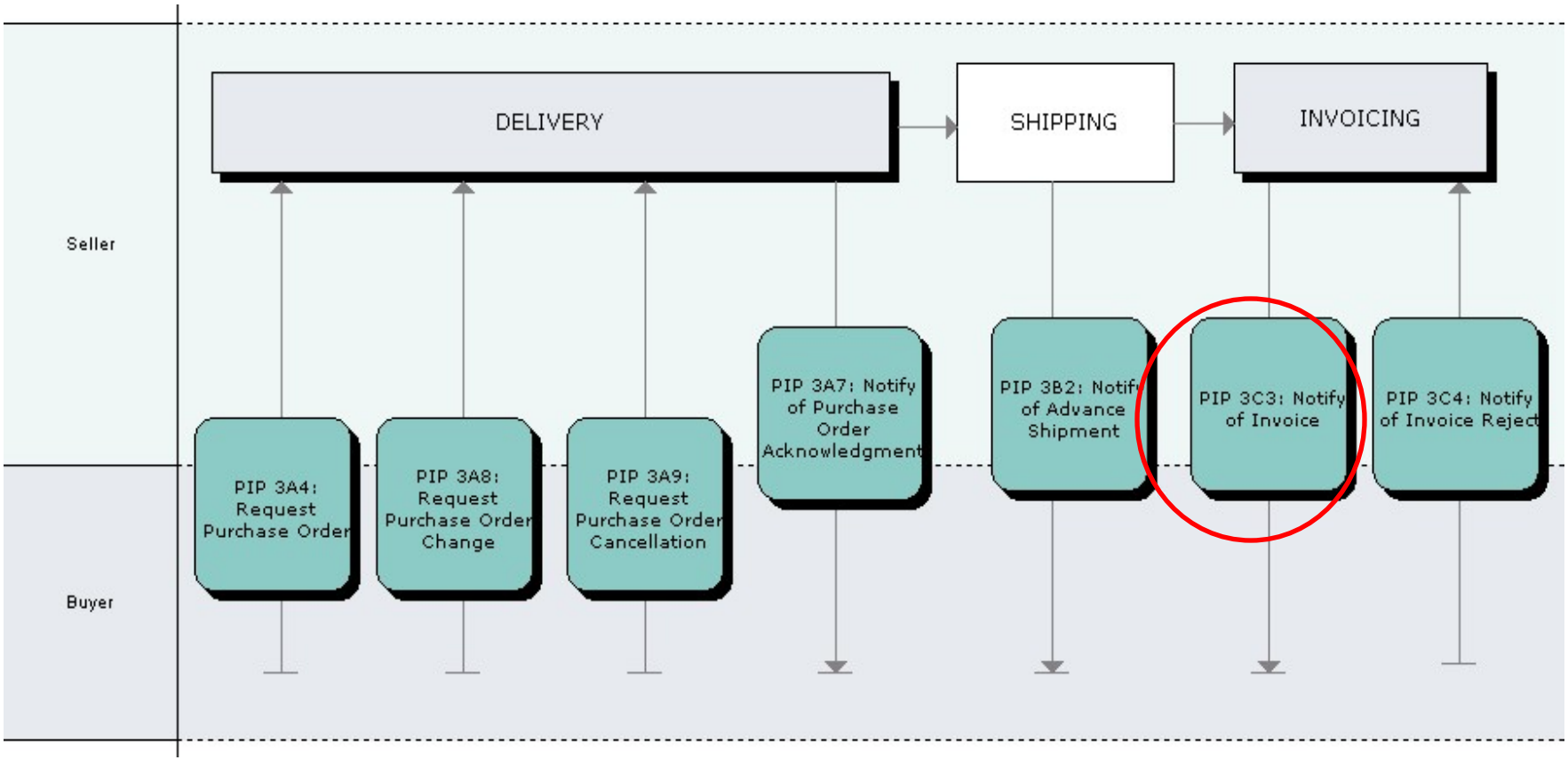
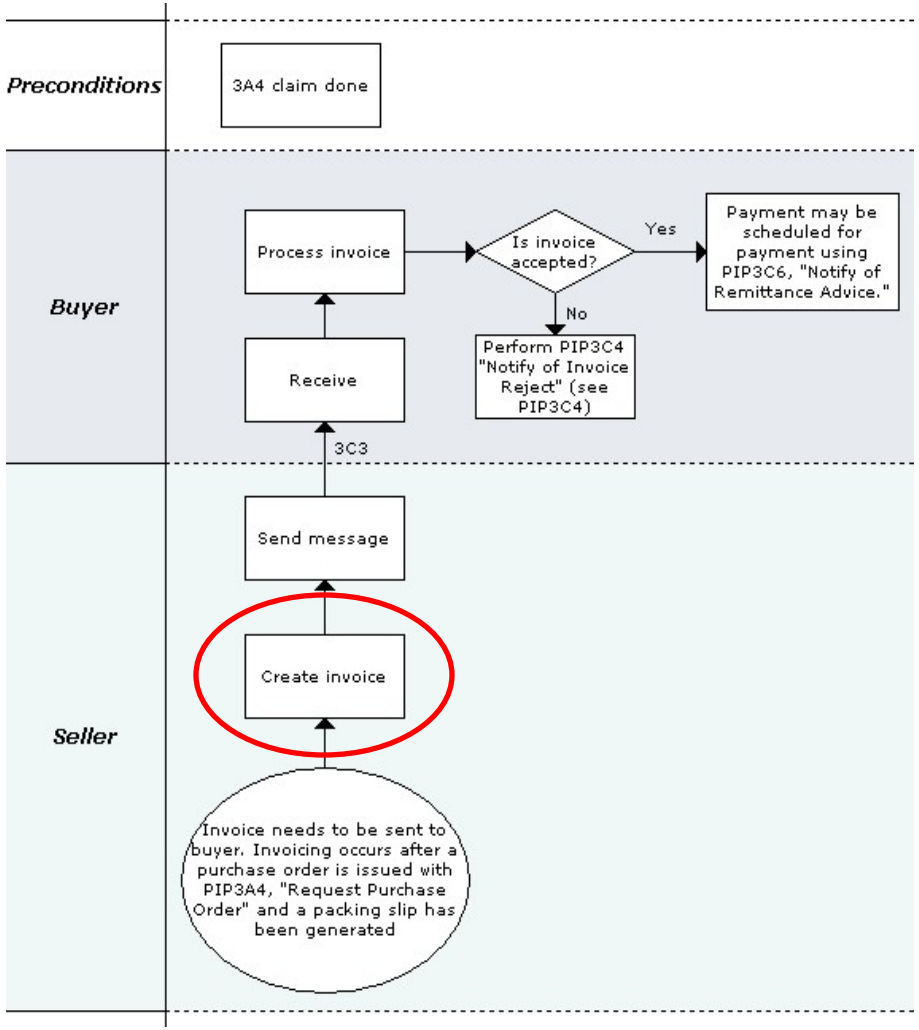
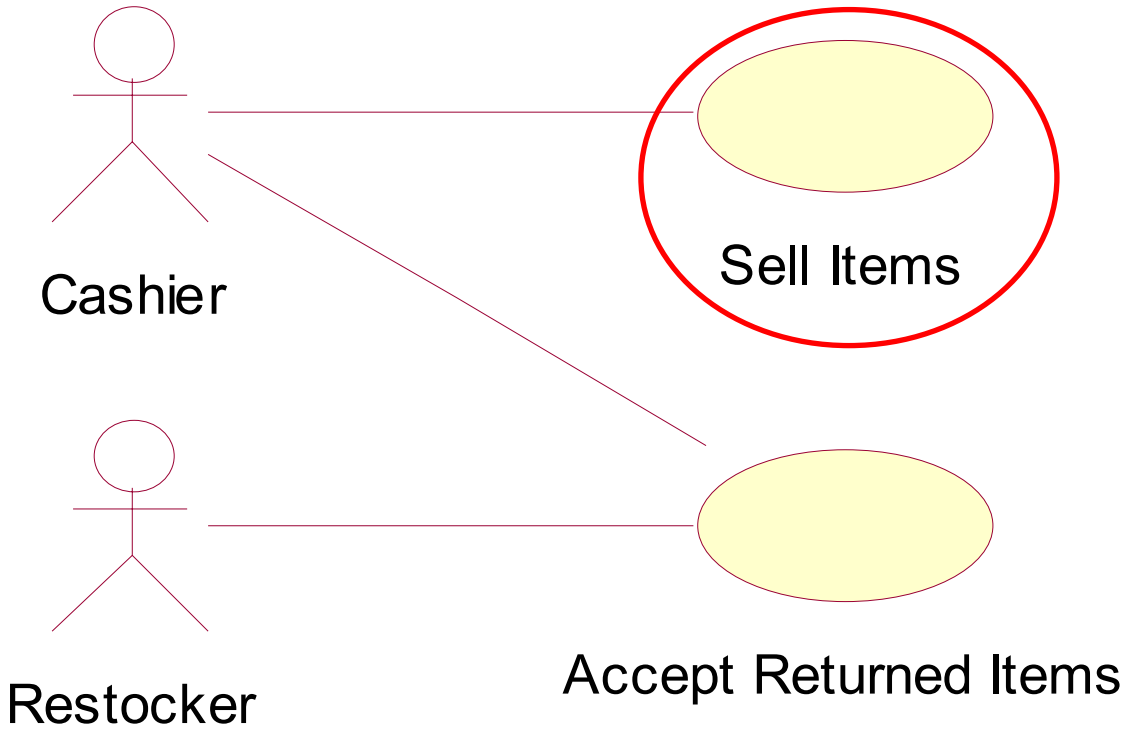


Drilling Into Our Example...



...Bringing Us Back To Our Original Use Case



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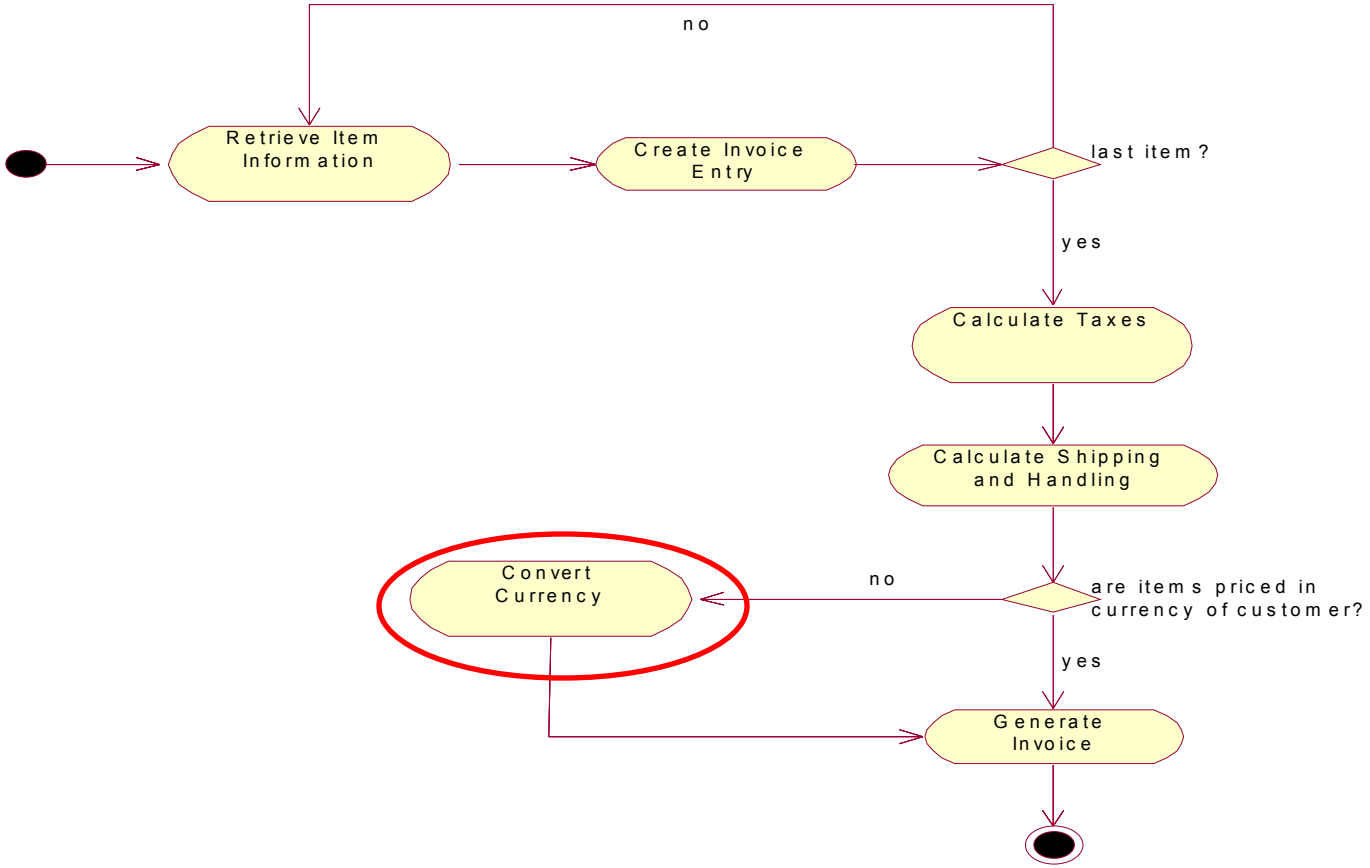
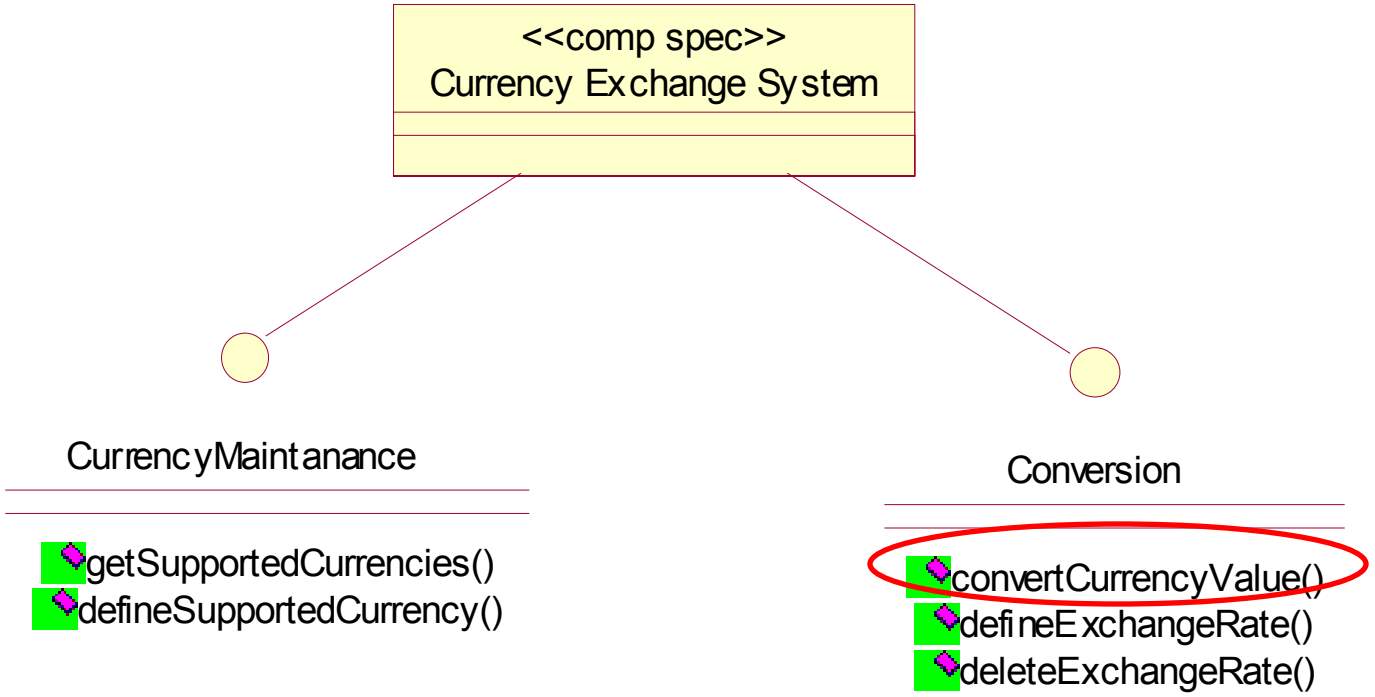
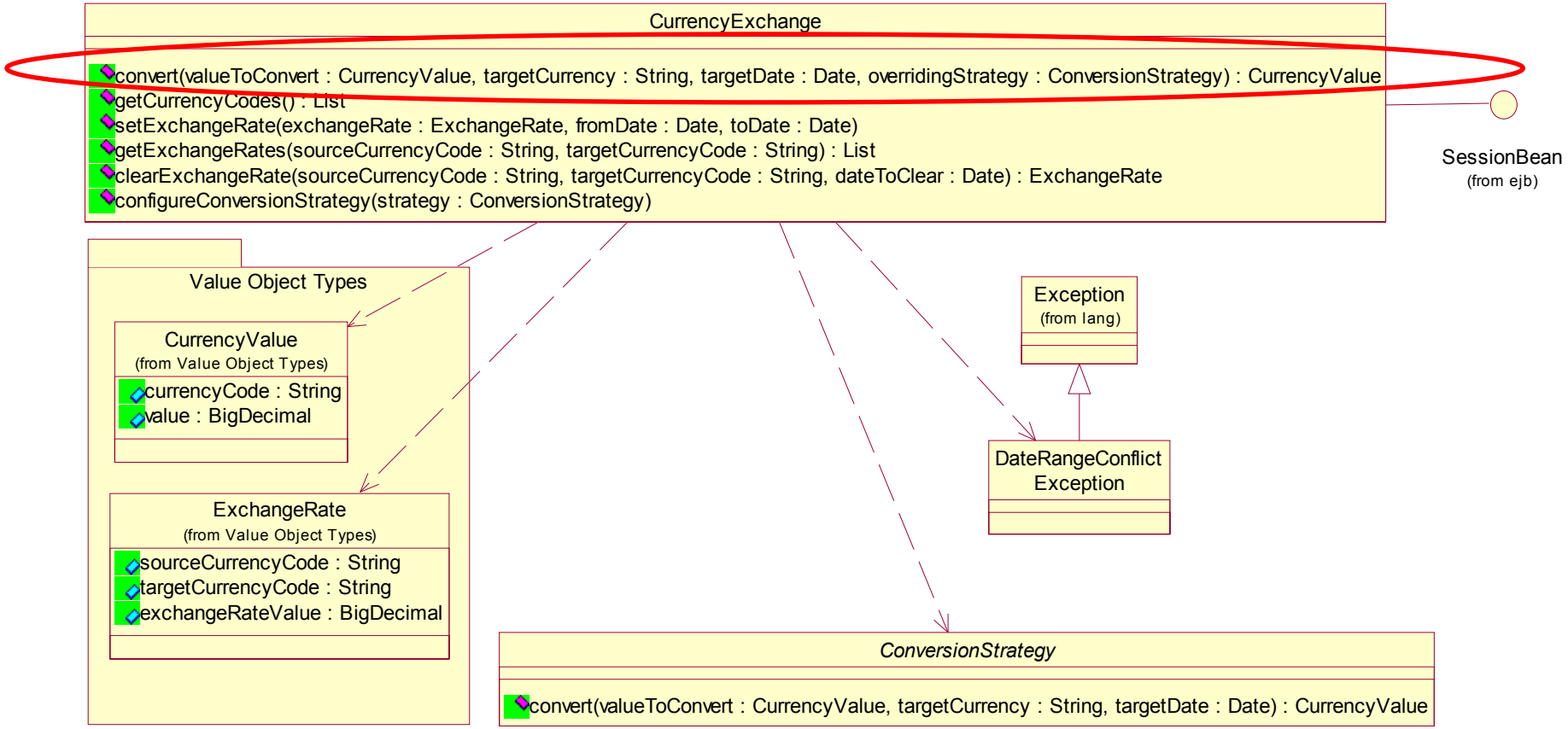


...And Our Original Component Model



...And Finally To Our Original Component!



So What?

- Business processes matter to an IT organization!
  - After all, you are "in business" to support the business (and not the other way around…)
- Defining the right business processes is hard work
  - Most organizations do not have a clear view of how they do business
  - Using standards-based processes (in part or in whole) can help to rationalize the business
  - Don't try to "boil the ocean" – pick and choose the most important/dynamic areas of business to focus on
- Linking business processes to existing and new technology is also hard work
  - Web services (and service-oriented architectures) can help
  - Tools can help

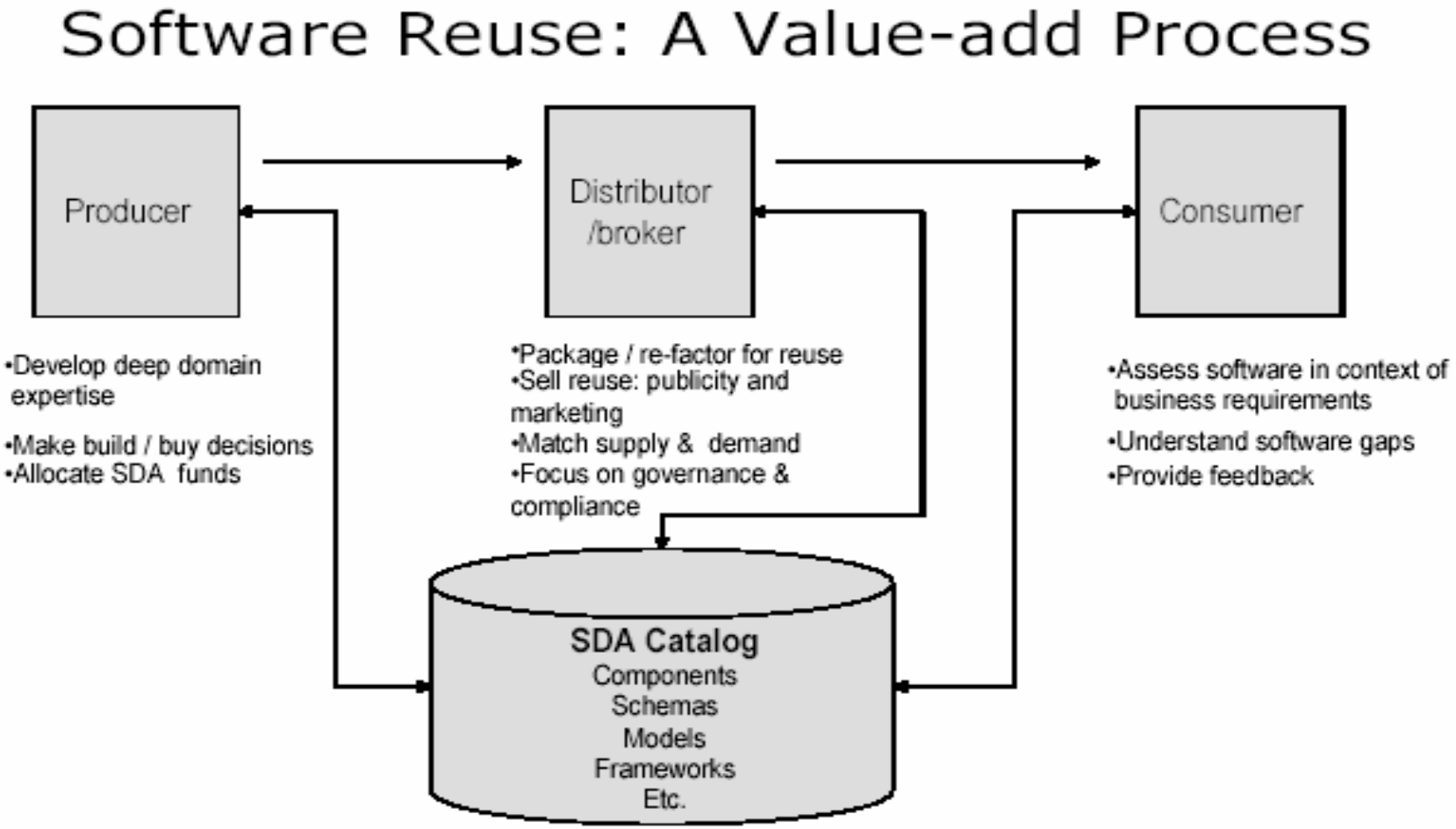
Which leads us to our best practices and case study…

SDA Reuse Best Practices

SDA Reuse Best Practices

- SDA reuse is supported by production/distribution/consumption roles
  - **Production:** Identification and preparation of existing and newly-defined candidate reusable SDAs
  - **Distribution:** Publication of those SDAs into SDA library
  - **Consumption:** Use of SDA library to discover appropriate reusable SDAs on a per-project basis
- SDA reuse effectiveness is assessed by management governance and ROI review

SDA Reuse Lifecycle



Tools Enablement of SDA Reuse

- Traditionally reuse has occurred via **word-of-mouth**
  - Effective for very small groups but doesn't scale
- Various **tool-based attempts** have been made in the past, including:
  - Spreadsheet "registries"
  - Full CASE tooling
  - Version control repositories
  - Ad-hoc collaboration databases
- New **SDA metadata repository** space has emerged in past 2-3 years
  - Gartner March 2004 report and Magic Quadrant on Metadata Repositories
  - These **tools**, plus **rationalization** of development space into **.NET** and **J2EE** component and service architectures and dramatically **improved IDE tooling** (e.g., VS, WSAD, Eclipse) enable for the first time effective SDA reuse practices and governance

SDA Production

- Best practice recommendation: virtual/matrixed SDA architectural review team
  - **Team members:**
    - ***Team leader*** dedicated to SDA reuse program
    - ***Matrixed team members*** drawn from project teams
      - Lead designer/developer skills required
      - 10%-20% job responsibility
  - **Team objectives/responsibilities:**
    - ***Identify*** candidate reusable SDAs – "active discovery"
    - ***Review*** proposed reusable SDAs – asset hardening
      - Adherence to architecture
      - Necessary functionality implemented and supported
      - Mandatory artifacts provided
    - ***Publish*** approved SDAs into SDA library for consumption
    - ***Recommend*** future resource allocation for key reusable SDAs
      - Expanded funding for key SDAs
      - Transfer of key SDAs to common SDA support group

SDA Distribution

- Best practice recommendation:
  SDA library (e.g., Logidex) to distribute assets
  - Asset metadata ***assembly*** and ***validation***
    - Standardized metadata definition
    - Per-asset-type metadata validation and enforcement
  - Asset publication
    - Newly defined SDAs
    - Updated SDAs
    - New versions of existing SDAs

SDA Consumption Modes

- Best practice recommendation: ***named user consumption***
  - Project-scoped interactions/tracking
  - SDA acquisition
    - Project Manager and Asset Publisher approval
  - Project and asset-specific collaboration
    - Discussion forums
    - Persistent searches
    - Asset notifications
- Access alternative: ***anonymous consumption***
  - Suitable for lightweight/casual users
  - Read-only interaction with library
  - Restricted tracking and collaboration activities

SDA Reuse Management Example: Charles Schwab

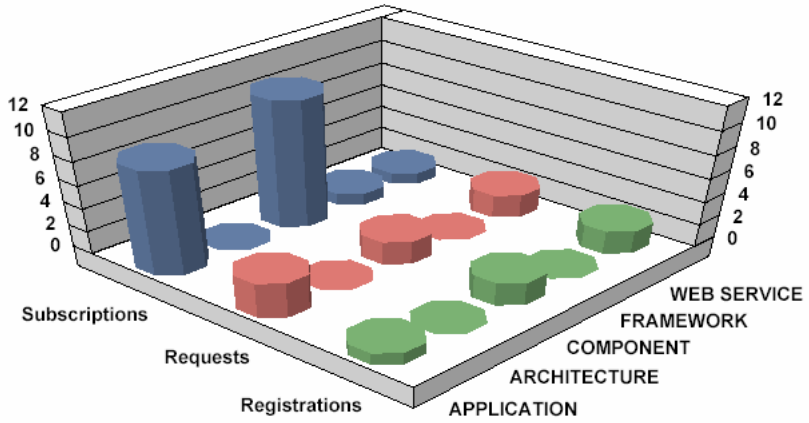
- SDA ROI reporting examples:
  - "Big Picture" rollup
  - Project-specific SDA reuse ROI

For each type of Asset, this report shows a count of reuse transactions. Reuse transactions include Project Asset Requests, Project Asset Registrations and Asset Subscriptions. This report displays a graph with totals of subscriptions, requests and acquisitions for each Asset Type. It includes the detailed information of each reuse transaction following the graph.

Printed Date: 6/3/2003

Includes Asset Requests from the first Asset Request to 5/22/2003

Enterprise-Wide: Activity by Asset Type



Assets Requested for Acquisition for a Project by Project Users. Report is sorted by Asset and gives information on each request. In addition, it shows a count of asset requests, the potential reuse savings if pending asset requests are approved and the name of the requesting party and the status of

Printed Date: 4/29/2003

Includes Asset Requests dated from 11/ 1/2002 to 4/29/2003

GainWithholdingEngine 1.0

The Gain Withholding Engine is an application for the tax administration of annuity contracts.

PROJECT	REQUESTING USER	REQUEST STATUS	
apayne	Payne Ann	Pending Project Mgr Approval	
	Request Date>>> 1/10/03	Potential Reuse Savings>>>	34,642
Settlement	Johnson Bruce	Pending Project Mgr Approval	
	Request Date>>> 1/4/03	Potential Reuse Savings>>>	34,642
Online Brokerage	Payne Ann	Asset Publisher Rejected	
	Request Date>>> 1/4/03	Potential Reuse Savings>>>	0
Total Requests for this Asset >>>	3	Total Potential Reuse Savings for this Asset >>>	**$69,284**

SDA Reuse ROI Example

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Logidex Return On Investment (ROI)

ABC Company	Year 1	Year 2	Year 3
Environmental Data			
Total Research and Development Cost (est.)	$3,750,000	$7,725,000	$11,935,125
Total Number of Developers	25	50	75
Loaded Developer Cost	$3,750,000	$7,725,000	$11,935,125
Logidex Investment			
Cost of Logidex and the implementation	$ 70,000	$ 35,800	$ 40,300
Estimated ROI			
Savings from reusing components	$1,035,750	$3,362,400	$6,902,784
Additional savings from using Logidex to help write reusable assets	$11,250	$69,525	$107,416
Additional savings from using Logidex to find and understand assets	$144,000	$444,960	$916,618
Total Cost Savings	**$ 1,191,000**	**$ 3,876,885**	**$ 7,926,818**
Incremental Logidex Payback Time (in months)	**6.30**	**5.90**	**5.04**

The LogicLibrary Reuse Calculator is based on the reuse metric terms, return-on-investment (ROI) model, and "ReuCalc" calculator developed by **Dr. Jeffrey S. Poulin**. Details of this work appear in Dr. Poulin's book, **Measuring Software Reuse: Principles, Practices, and Economic Models**, published by Addison-Wesley (ISBN 0-201-63413-9) in 1997.

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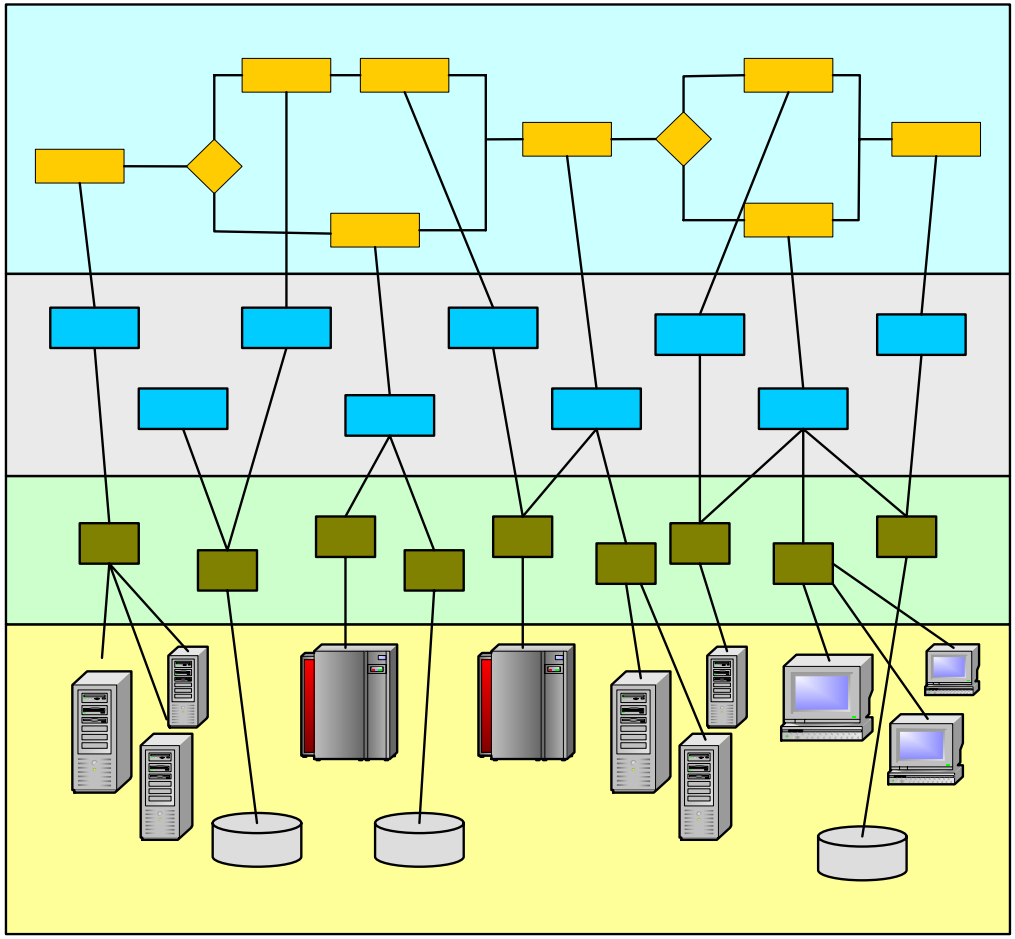
SDA Management/Governance Case Study

Services Lifecycle Case Study: CNA Insurance

- CNA Insurance
  - Global Insurance organization
  - 12 billion in revenue
  - 15,000 employees total, 1,600 in IT workforce
- CNA's Service-oriented Architecture Initiative
  - Led by Dmitry Tyomkin and Boris Lublinsky, Enterprise Architects, CNA's Solutions and Architecture Group
  - Objectives:
    - Build bridges between different systems and applications
    - Leverage existing IT assets
    - Create ability to respond quickly and efficiently to changes in the business environment

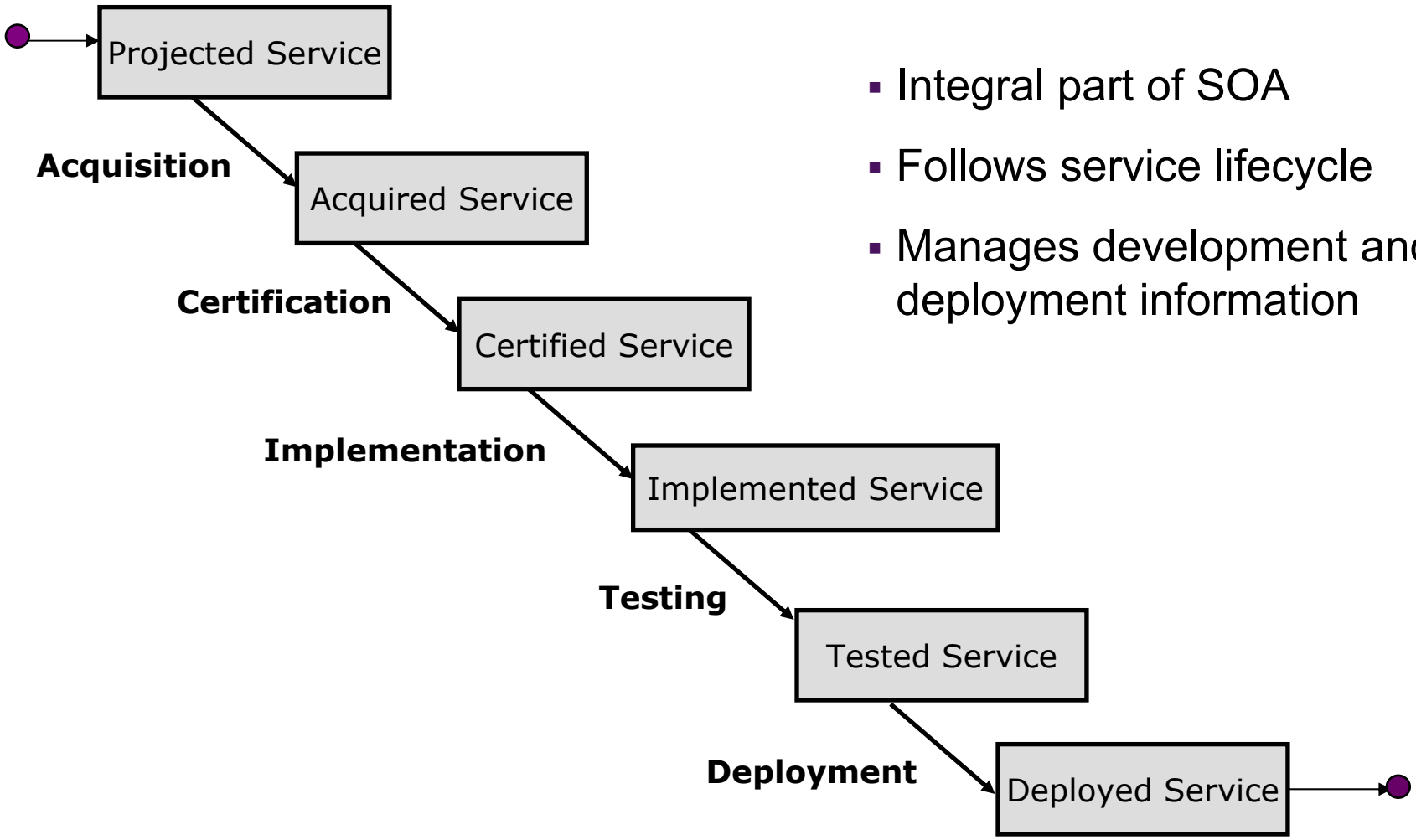
SOA in the Enterprise Architecture – CNA's View



Current SOA Components in CNA

- Consolidated Infrastructure
- Enterprise Service Bus
  - Integration Hub
  - Service Invocation and Execution Framework
  - Service Locator
- Services Implementation Framework
- Services Classification

CNA's Service Catalog: LogicLibrary Logidex



- Integral part of SOA
- Follows service lifecycle
- Manages development and deployment information

Service Composition

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- Services and Methods are managed independently
  - Services are composed of one or more Methods
  - Methods may be composed within one or more Services
    - Method will typically be composed within a single Service
  - Relationships between Services and Methods are managed with strongly-typed asset-to-asset relationships within Logidex-managed metadata
- Appropriate Methods identified as new Services are defined and projected
  - Projection process includes:
    - Selecting from predefined Methods
    - Specifying new candidate Methods
- Method-level granularity within Logidex enables:
  - More granular usage tracking
  - Flexible service composition based on domain needs

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Logidex Introduction

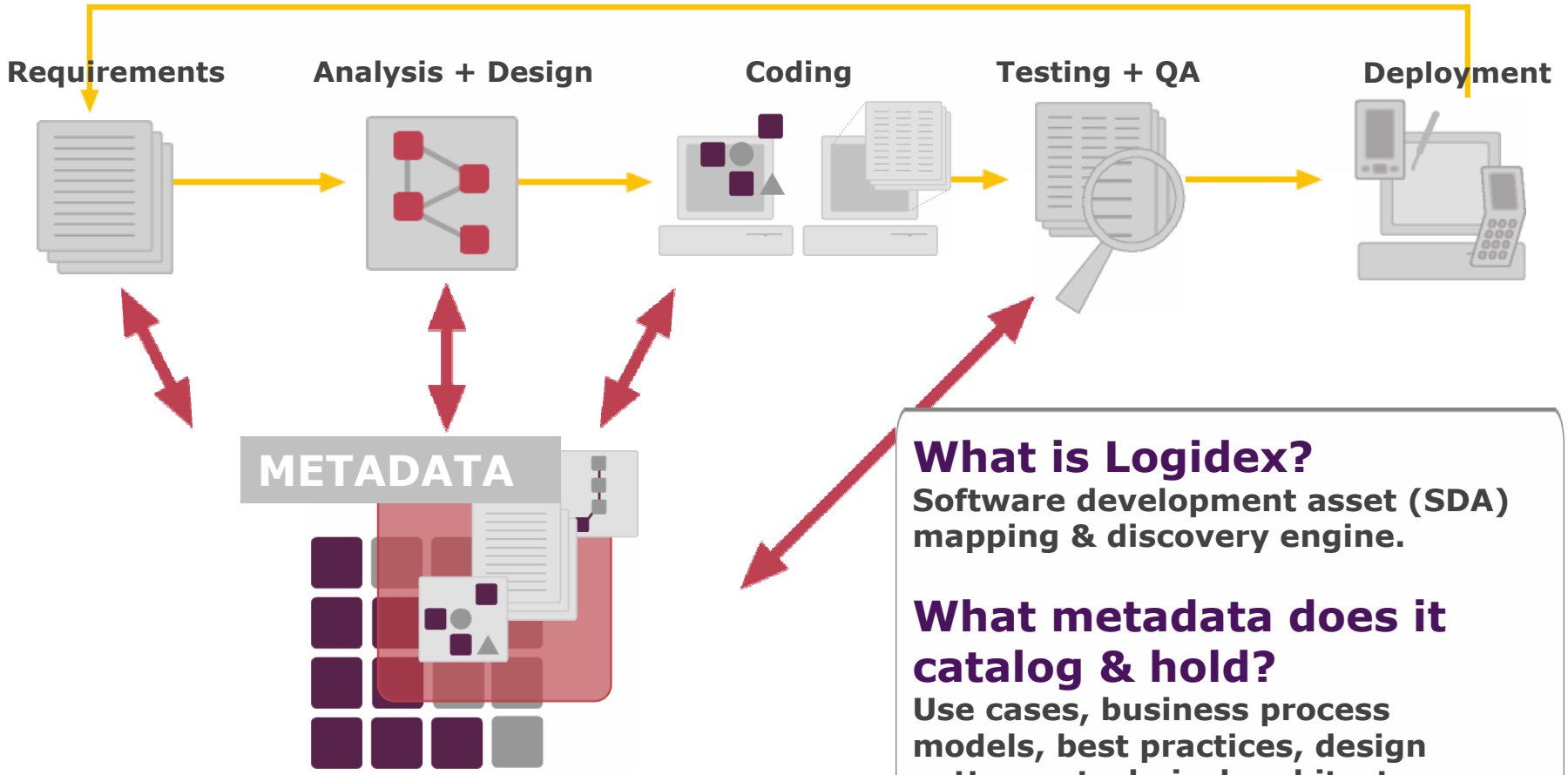
LogicLibrary Logidex

- What it is:
  - Catalog of software development asset (SDA) metadata
- Why it's different:
  - Powerful mapping, discovery and collaboration engine for identifying and using SDAs in all types of software development and integration

Clear Value Proposition:

Logidex enables faster and less costly consolidation, migration and/or integration of enterprise applications

Application Development Lifecycle: With Logidex



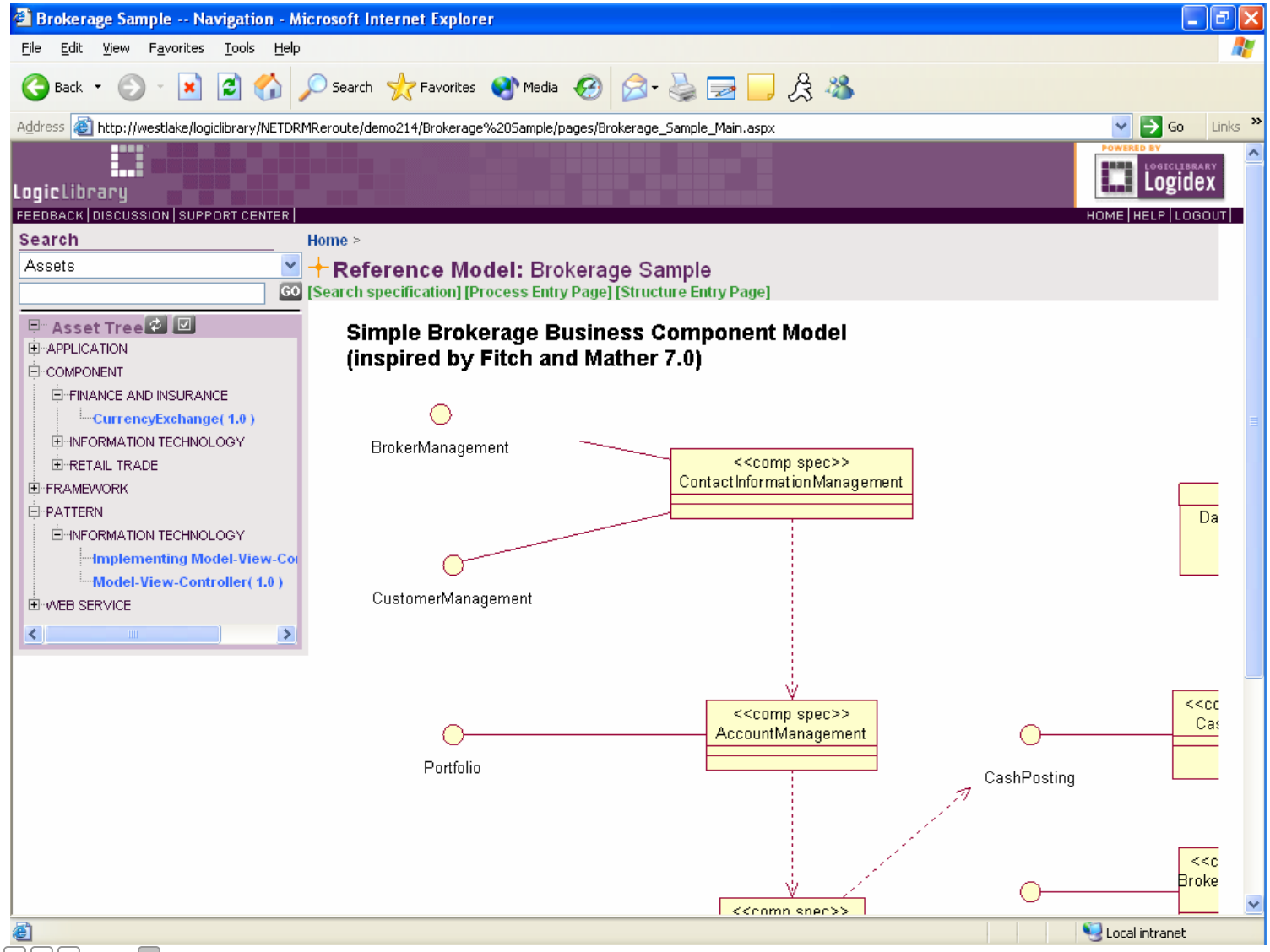
What is Logidex?

Software development asset (SDA) mapping & discovery engine.

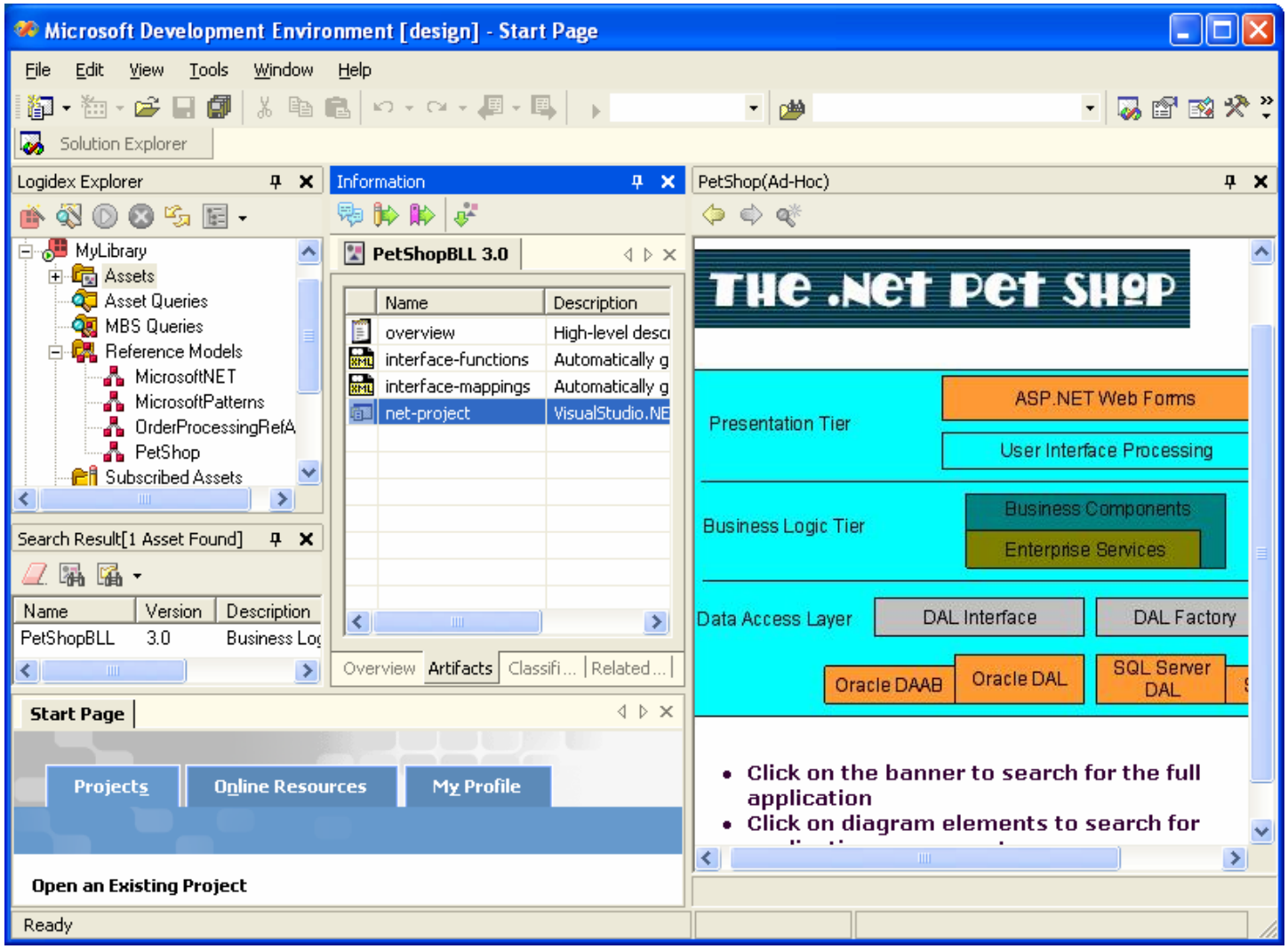
What metadata does it catalog & hold?

Use cases, business process models, best practices, design patterns, technical architectures, applications, components (code, agents, etc.), services documentation, test cases

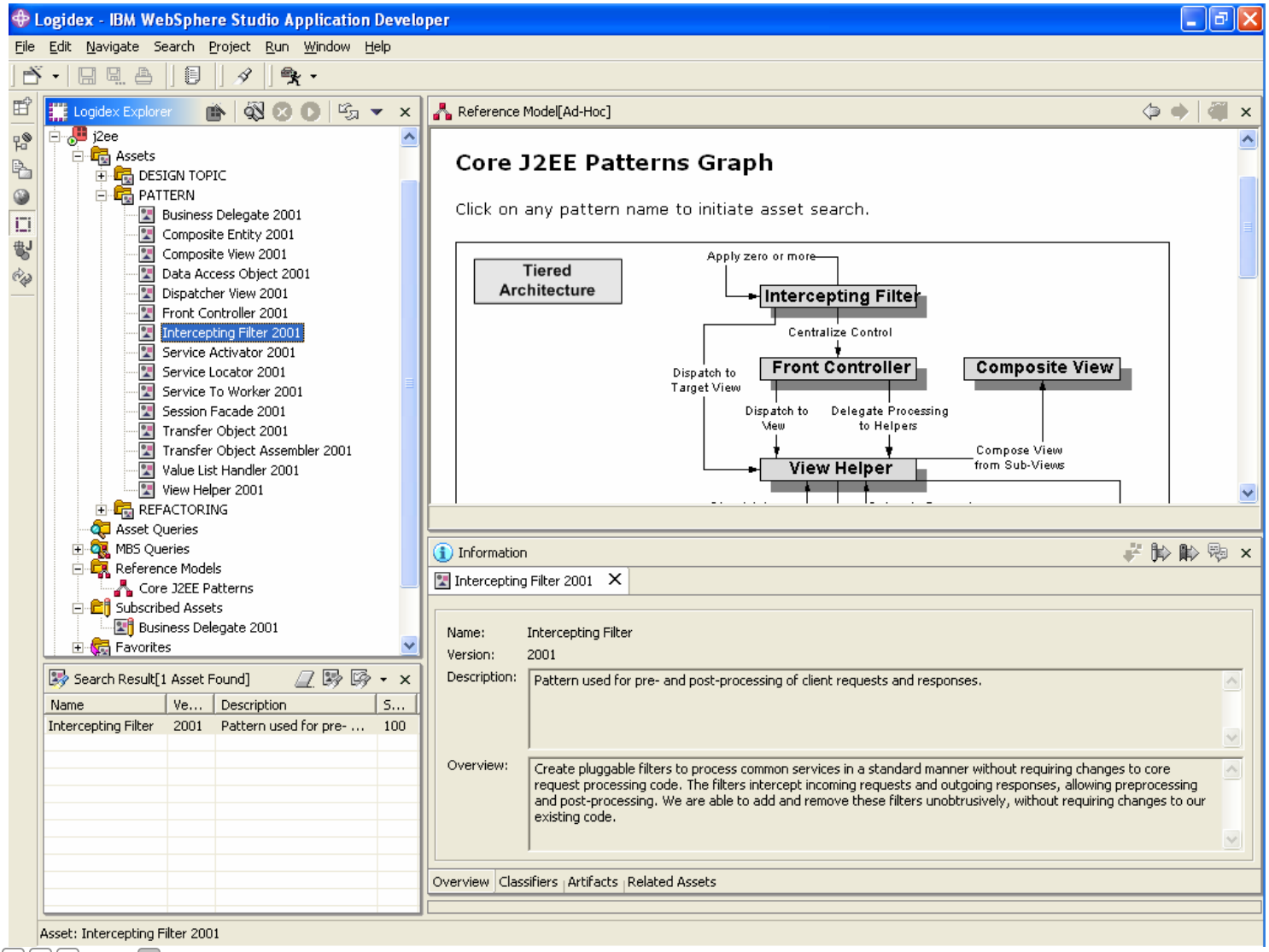
Logidex thin-client



Logidex Visual Studio .NET Add-in

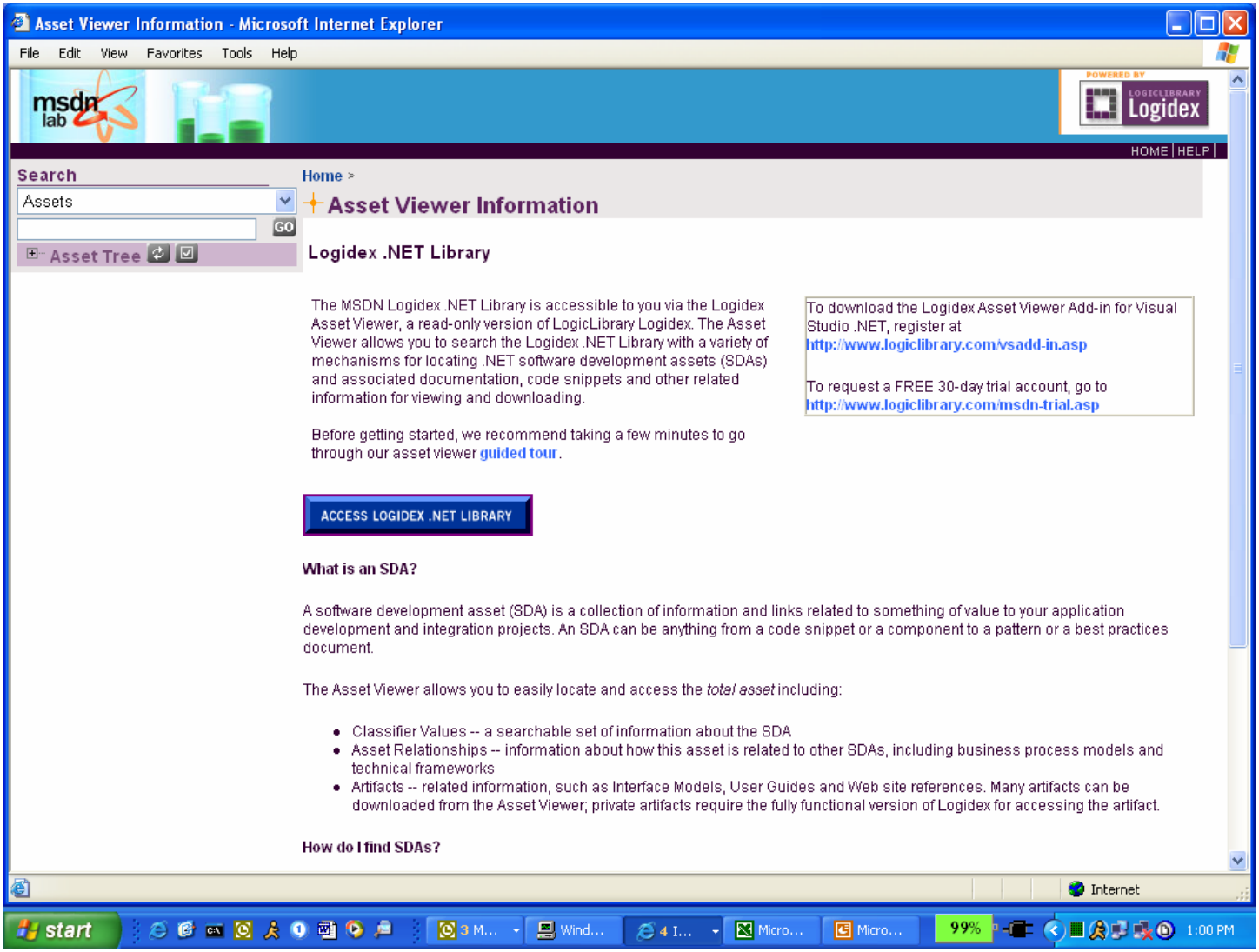


Logidex WSAD/Eclipse plug-in

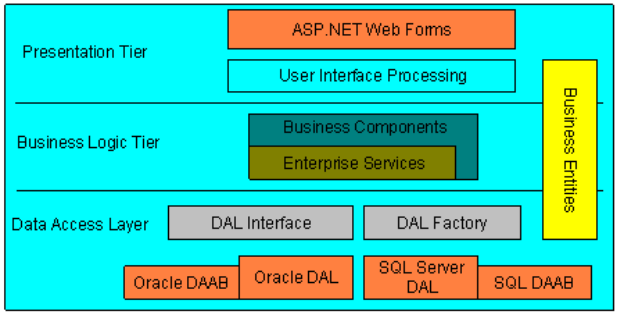


How can you try Logidex?

MSDN Logidex .NET Library

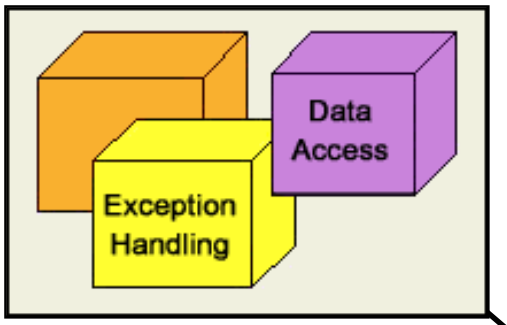


Logidex .NET Library Contents

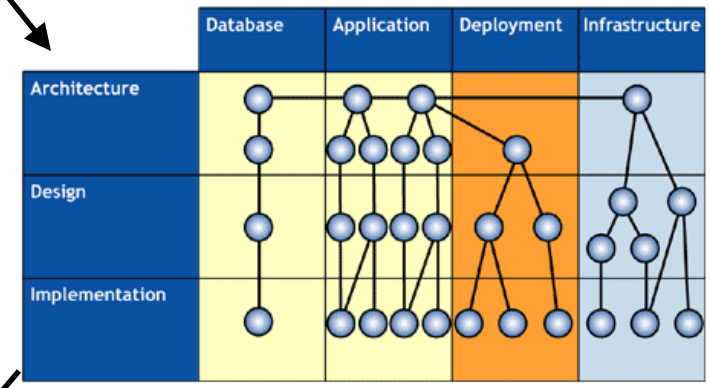


Reference Application

The .NET Pet Shop



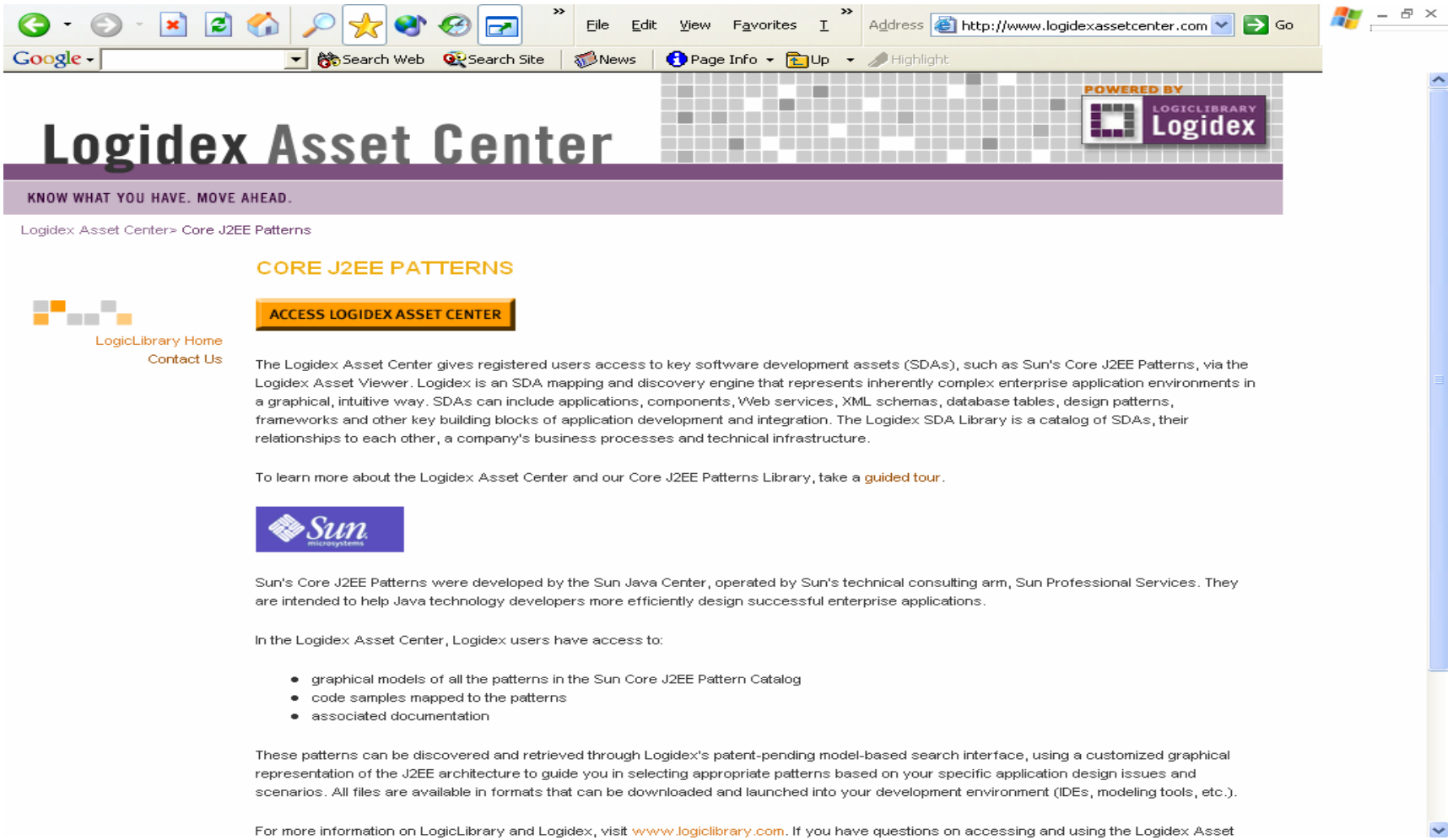
Application Blocks



Enterprise Solution Patterns

Microsoft .net Framework

Logidex Asset Center
Core J2EE Patterns, RosettaNet PIPs, and FEA Reference Models and Assets



Accessing Logidex

LogicLibrary

- MSDN Logidex .NET Library
  - Free access to thin client and Logidex add-in
    - Thin client: **http://lab.msdn.microsoft.com/logidex**
    - Add-in: **http://www.logiclibrary.com/vsadd-in.asp**
  - Trial account to put your own assets side by side with the MSDN .NET Assets in a private ASP-hosted library
    - **http://www.logiclibrary.com/msdn-trial.asp**

- Logidex Asset Center
  - http://www.logidexassetcenter.com

Thank you!