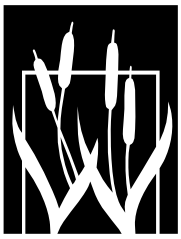

Whitemarsh
Information Systems Corporation

Whitemarsh Metabase Business Information Systems Users Guide

March 2011

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1 Introduction

The purpose of the database application, Business Information Systems (BIS), is to provide a simple database to catalog the set of business information systems located within an enterprise according to defined characteristics.

Presumed Knowledge

This user guide, and all the other metabase user guides presume that the reader has read and is completely familiar with the following documents: Metabase Common Processes, and Metabase Bill of Materials and Single File Recursion (BOM/SFR Guide). These two documents serve as metabase teaching guides for processes that commonly occur throughout the metabase system.

F7 invokes automatic spell checking on all text fields like names and descriptions.

Metabase Example

The metabase example, Movies, is a complete example of a business which is available from the Whitemarsh website. The Movies Rental Corporation was modeled after the largest movies rental corporation in the United States. As such, the example has national, regional, and retail outlets. There are two data models, one for an original data capture, store based system, and another which is a data warehouse for rented movies.

2 Software Installation

Metabase installation is explained in the Metabase Administrators Guide.

3 Database Design

The tables associated with this application are:

- Application type
- Business Event Cycle
- Business Event Cycle Structure
- Business Event Cycle Structure Type
- Business Information System
- Business Information System and View
- Business Information System Database Object Information System Assignment
- Calendar Cycle
- Calendar Cycle Structure
- Calendar Cycle Structure Type

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- Data Architecture Class
- DBMS environment
- Environment type
- Predominant User Class
- Level
- Status
- Programming Language
- Construction Method
- Application Type
- Resource Life Cycle Node Business Information System Assignment

Figure 1 presents the overall database schematic. Shaded entities are read-only and are involved in the application for data selection and report purposes.

- An Application Type is a classification of the application such as distribution, finance, human resources and the like.

- A Business Event Cycle is a cycle during which business events occur such as financial reports, holidays, business planning and the like. A business event cycle may be simple or complex. If complex then the business event cycle actually consists of other business event cycles as represented in the business event cycle structure.

- A Business Event Cycle Structure is a collection of business event cycles, for example, a Summer cycle may also consist of a End of School cycle, Back to School Cycle, Vacation Cycle, and a Holiday Cycle.

- A Business Event Cycle Structure Type classifies a collection of Business Event Structure instances.

- A Business Information System is a computer based information system that is being managed through the metabase. It is know by its characteristics, its operation cycles (business event and calendar), subordinate business information systems, employed databases, views, and associated resource life cycle nodes.

- A Business Information System and View is an association between a view and a business information system. This then enables knowledge of the DBMS columns and DBMS tables that are accessed by the business information system.

- A Business Information System Database Object Information System Assignment records the database object information systems that are invoked by the business information system.

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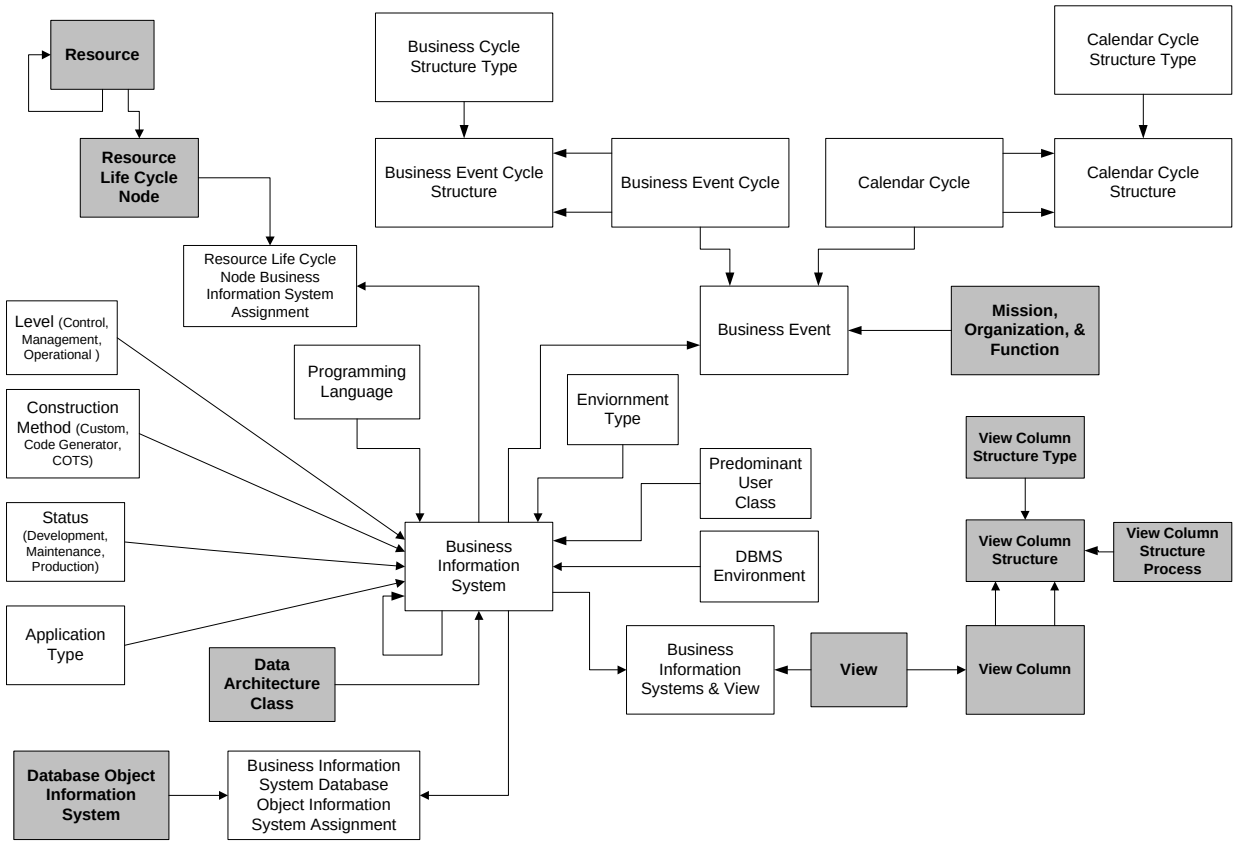

Figure 1. Business Information System meta model.

- A Calendar Cycle is a set of recurring calendar based dates that are of interest to the enterprise. For example, quarterly, bi-weekly, monthly, daily, and the like. Calender cycles are linked to Business Events so that the timing of business event triggering can be know.

- A Calendar Cycle Structure is a collection of calendar cycles, for example, a Financial Report cycle may consist of a Second Week of the Month, the Last Friday of the month, and the first day of the quarter.

- A Calendar Cycle Structure Type is a classification of a set of Calendar Cycle Structures.

- The Data Architecture Class is a classification of a style of database design supported by the application. The most common data architecture classes are original data capture, transaction data staging area, reference data, wholesale data warehouses and retail data warehouses (also called data marts).

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- The DBMS environment meta entity is intended to carry information that would indicate that the business information system is serviced by one or more than one DBMS such as Oracle or Sybase.

- The Environment type meta entity is intended to distinguish whether the business information system is executing on a desktop, server, or mainframe.

- The Predominant User Class meta entity is intended to distinguish among the types of users of the business information system. Examples are executive, middle management, and line managers

- The Programming Language meta entity distinguished the development language of the business information system such as Cobol, Fortran, etc.

- The Construction Method meta entity type of the application includes custom, COTS, and the like.

- The Level meta entity type of the application is its fundamental orientation such as operational, executive and control.

- The Production Status meta entity type of the application indicates whether the application is in development, test, or production.

- The Resource Life Cycle Node Business Information System Assignment meta entity represents the association of the business information system with one or more resource life cycle nodes.

4 Reference Data

The following are the data value sets that should be considered for use when create instances for the Business Information System table. These values are the ones present in the demo tables of the business information system software.

Table	Value set
Application Level	Executive, Operational, Control
Application type. The broadest category of application.	HR Distribution Finance Inventory Manufacturing Sales and marketing

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Table	Value set
Construction Method	Custom, COTS, Code Generator
Data Architecture Class	Original Data Capture (enter time cards, HR record information, etc.). A PowerBuilder application for order entry at a sales office in Sioux City, Iowa. Transaction Data Staging Area (no-index flat records that have made-consistent semantics because the source data came from diverse package applications. E.g., HR data from all the regions' HR packages, some mainframe, some PC, some server. Subject Area Database (the old one-database for all reasons concept. Embraces longitudinal data from multiple TDSA databases. Updating allowed for summary and analysis fields. E.g., nation-wide sales and marketing supported by analysis model and trends updates and projection model updates. Wholesale Warehouse (no-update, synchronized granularity and time databases that support generalized report intensive usages. E.g., nation-wide sales and marketing Retail Warehouse/data Mart (subsets of one or more wholesale warehouses that are restricted in end-user use. E.g., field sales database of all data related to salesman's customers. Reference data: data that contains restricted value sets and is used for the basis of foreign keys, breaks, etc. Restricted versions of finance codes, HR data, products, etc are commonly employed reference data databases.
DBMS	Oracle, Sybase, DB2, etc.
DBMS environment. That is, whether there is more than one brand of DBMS (e.g., Oracle and Sybase) that are servicing the particular database application.	Single brand Multi-brand
Environment type	Desktop Server Mainframe

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Table	Value set
Predominant User Class	Executive, middle management, line management, etc.
Production Status	Development, Test, and Production
Programming Language	Cobol, Fortran, C, C++

The value sets for all these tables can be changed as needed or appropriate. The value sets need to be set to those most appropriate to the classification of business applications.

5 Operation

Once the application is installed, it is ready to use. Just invoke the business information function from the metabase program. The application is a traditional windows application. Metabase reports are accomplished through any ODBC class report writer such as Crystal Reports.

5.1 Log In Process

Figure 2 shows the log-in screen that appears immediately after the application is started. Entered is your user name and your password. These are created by the Metabase Administrator through the metabase administration module. Please contact your metabase administrator to set up your user name and password. Once a user name and password is established, all the user's information can be changed by the user through a restricted use version of the administrator software. Once the send button is pressed the specific metabase database instances that can be accessed by the user is presented. The metabase is such that users are allowed to use specific metabase instances and specific metabase modules.

In this particular example, the user, once they sent their user name and password are shown the metabase database that they can access, that is, Movies. Highlight the choice and

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press the Select button. Once that is done then the metabase name, Movies, is shown as the data set that is being accessed.

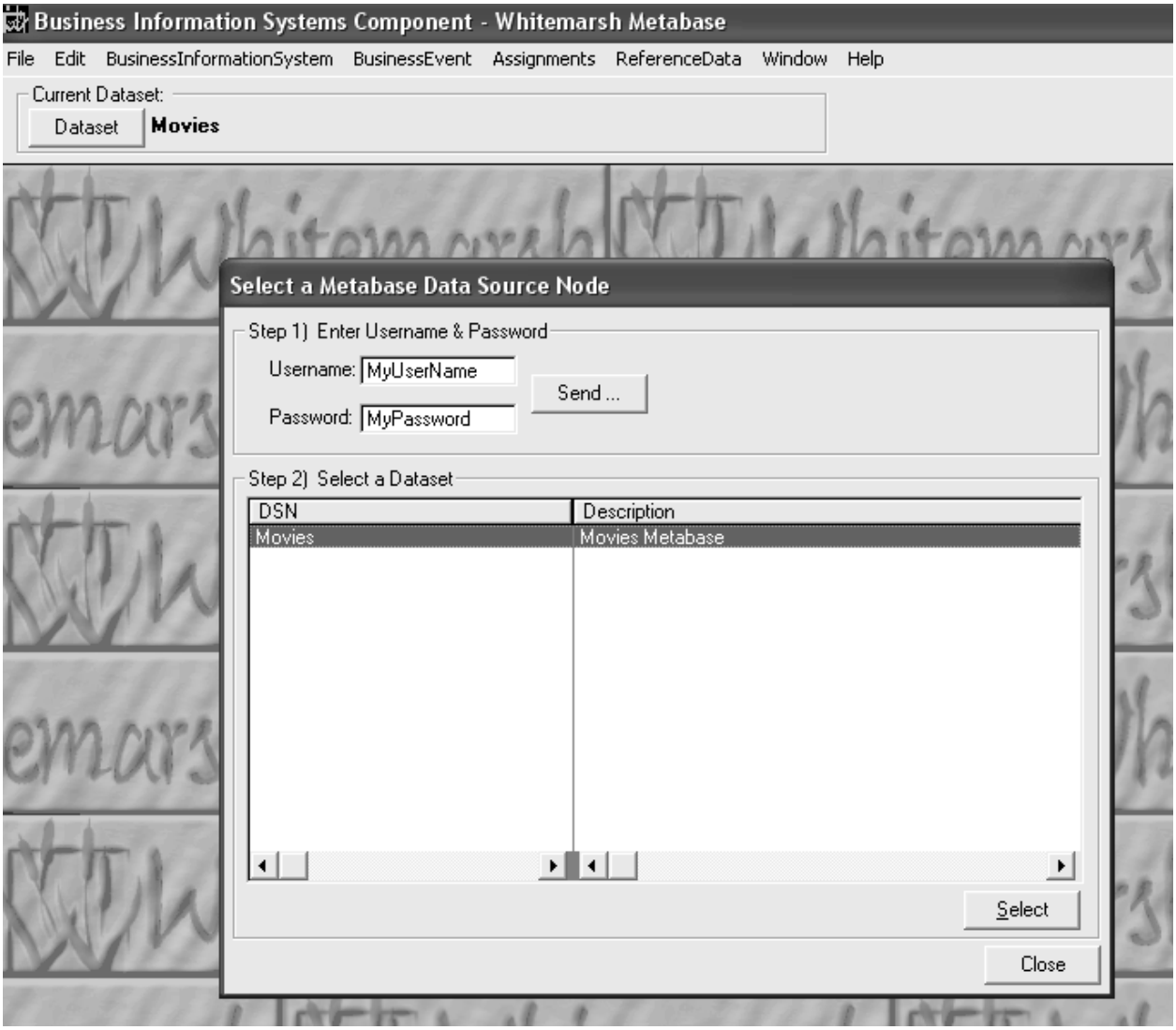

Figure 2. Log-in Screen.

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6 Process Model

The BIS process model consists of two classes of processes:

- Reference Data
- Business Information Systems

The actual menu structure is:

-- Business Information System
    -- Business Information Systems

-- Business Event
    -- Business Event Creation
    -- Business Event Update

-- Business Event Cycles
    -- Business Event Cycles
    -- Business Event Cycle Structures
    -- Business Event Cycle Structure Types

-- Calendar Cycles
    -- Calendar Cycles
    -- Calendar Cycle Structures
    -- Calendar Cycle Structure Types

-- Assignments
    -- Assign Business Information Systems to Database Object Information Systems
    -- Assign Business Information System to Views, and set BIS View Role
    -- Business Events To Business Event Cycle Assignment
    -- Business Events To Calendar Cycle Assignment

-- Reference Data
    -- Application Types
    -- BIS Levels
    -- BIS View Roles
    -- Construction Method
    -- DBMS Environment Types
    -- Environment Types
    -- Predominant User Classes
    -- Programming Language

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Figure 3 shows an example of navigating the menu structure.

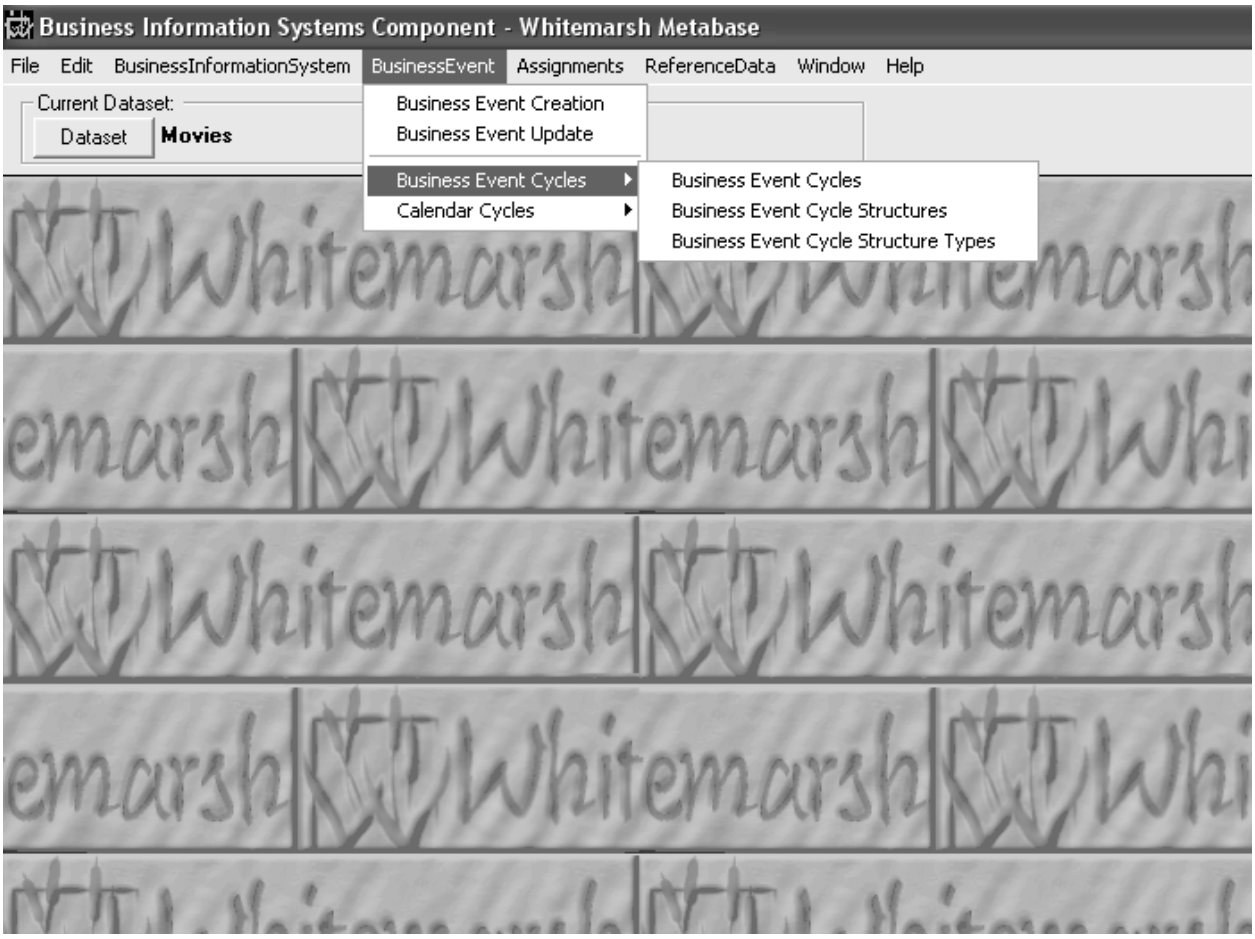

Figure 3. Menu structure fo Business Information Systems.

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6.2 Reference Data Processes

The BIS reference data processes are accessible through the menu option of the same name. The reference data items are:

- Application Type
- Construction Method
- Data Architecture Class
- DBMS
- DBMS Environment
- Environment Type
- Level
- Predominant User Class
- Programming Language
- Status

When a choice is selected the current set of reference data is listed. For example, Figure 4 shows the set of reference data choices for Business Information Systems Levels. The items of the list are shown on the left. A description for the highlighted item is shown on the right.

Adding or changing reference data consists of the following operations:

- INS key or button to insert a new reference data instance
- ENTER key or change button to modify an existing reference data instance
- DEL key or delete button to delete an existing reference data instance

If an attempt to perform a delete occurs but there are existing business information system records that are employing that instance, the delete operation is refused. Figure 5 shows the update screen for changing a Business Information Systems Level. The name and the description is able to be updated. To the left of the description entry there is a symbol, “ABC” with a check box. That enables the description to be spell checked. If you have MS/Word installed on your machine then pressing this ABC button takes you to a MS/Word spell checking routine.

This same combination of browse and then update screens apply to all the other types of reference data. The Data Architecture Class meta entity in Figure 1 is grayed. That means that the data values for this are created elsewhere. In this particular case these values are created in the Operational Data Model metabase module. That is because the meta entity, database, is created in the Operational Data Model metabase module and data architecture class is a classification scheme for databases.

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Figure 4. Business Information Systems Levels reference data.

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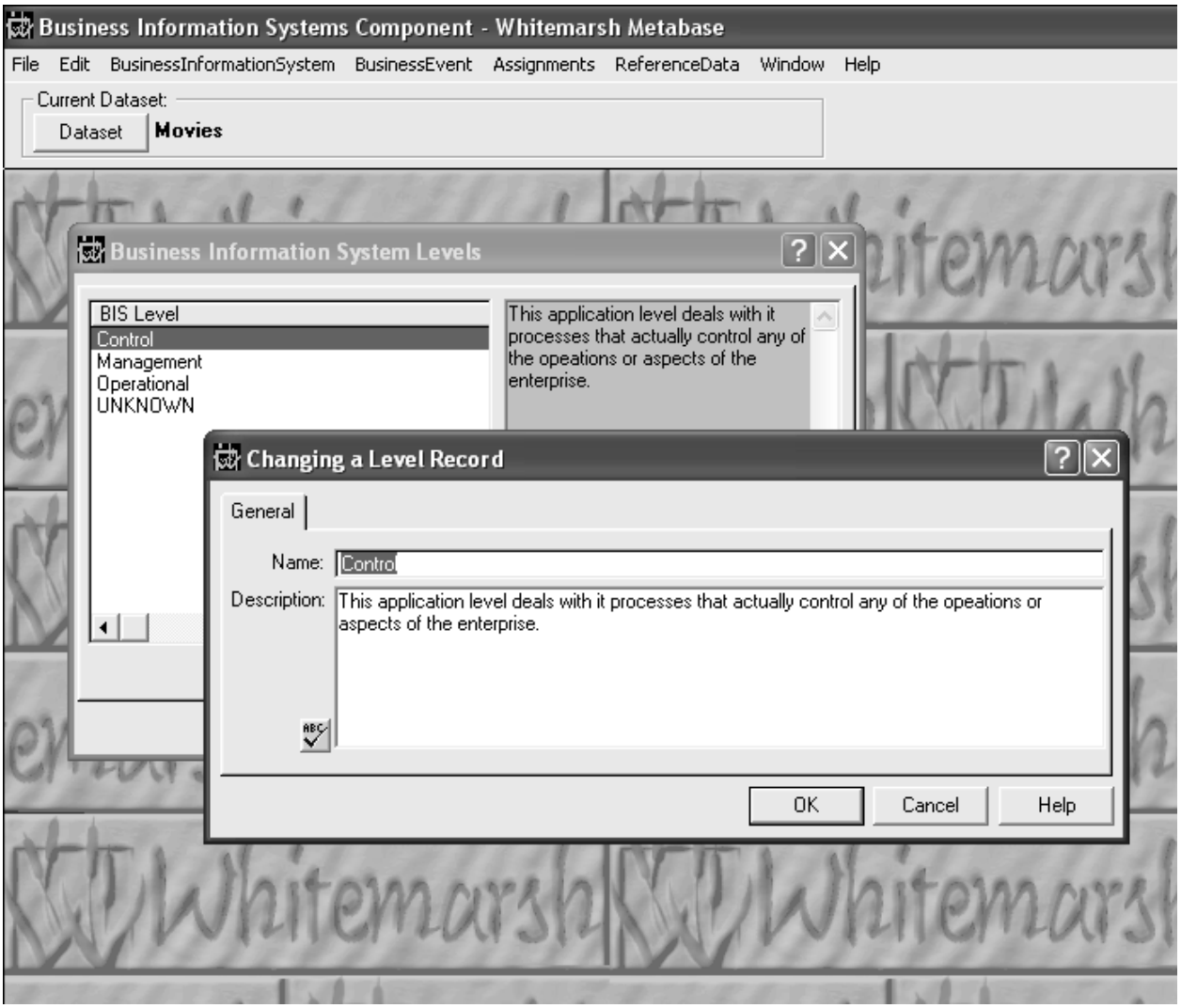

Figure 5. Update screen for Business Information System Level.

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6.2 Fact Data

Fact data within Business Information Systems consists of two main types:

- Business Information Systems
- Business Events

6.2.1 Business Information Systems

The metadata in support of business information systems includes:

- Business information systems
- Business information System database object assignments
- Business information system view assignments

6.2.1.1 Business Information System

The business information system's process consists of two main screens. The first is a browse that represents the current set of business information systems as shown in Figure 6. Since Business Information System does not exist in isolation, it is also subject to DELETE referential integrity rules. In this case, a business information system may be allocated to one or more resource life cycle nodes, database object information systems, or views. Regardless of the module that causes the attachment, the effects are felt in this module. For example, the allocation of a Business Information System to a Resource Life-cycle node is performed in the metabase resource life cycle module.

Figure 7 presents the update screen for a business information systems. This screen allows for the entry of a significant number of business information system characteristics. In this screen there are:

- Application type
- Architecture
- Business Information System Name
- Construction Method
- Data Architecture Class
- DBMS
- DBMS Environment
- Environment type
- Level
- Plans
- Predominant User Class
- Problem
- Production Status

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- Programming language
- Quantity of programs

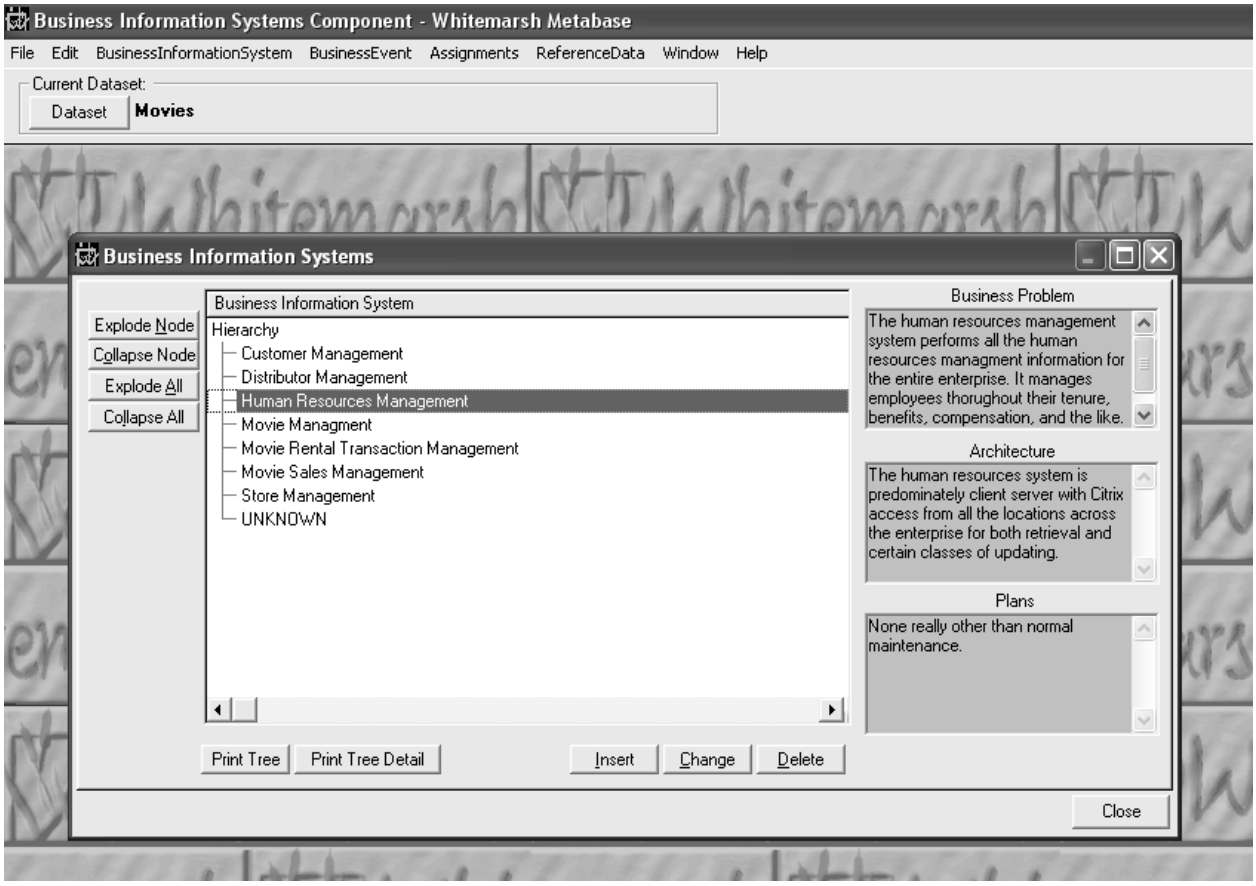

Figure 6. List of Business Information Systems.

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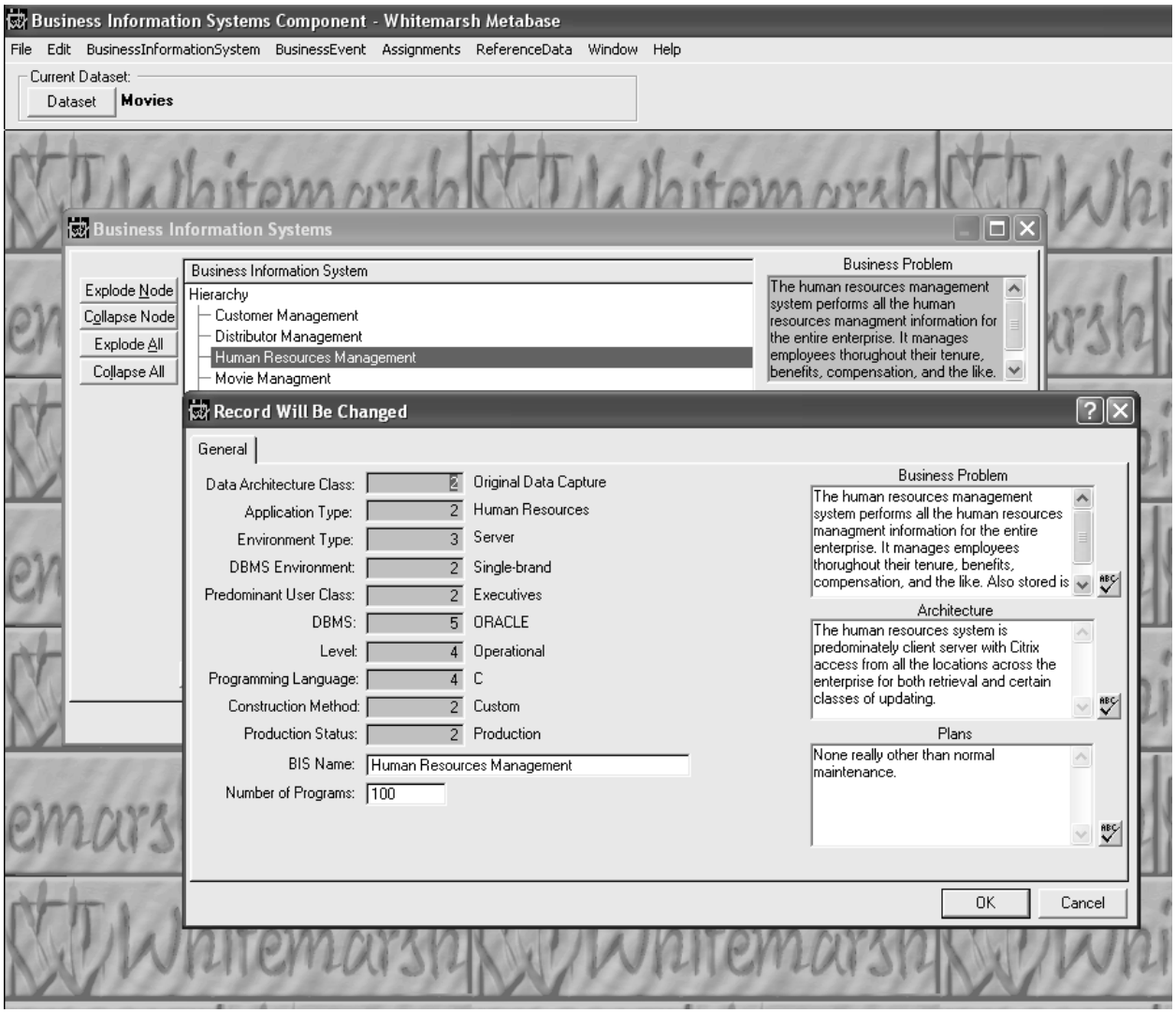

Figure 7. Updating the Human resources business information system.

The text entry fields, for example, business problem, can contain up to 255 characters and as can be seen, it word wraps. Values can be typed into business problem, architecture, and plans. Values can also be typed into BIS name, and number of programs.

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The business information system characteristics fields are not direct entry fields. They are data look-up fields. The default value for data architecture class is zero. When the field is selected, the value is immediately check for validity. Since Zero is not valid, the then current list of valid values pops up, from which a valid selection can be made. Figure 8 shows the list for data architecture class. After highlighting the correct choice, press the Select button at the lower right side of the screen. The appropriate key value then appears in the main update screen. In addition, the name of the chosen application type also appears.

Once all the values are entered in the update screen, the OK button must be pressed to then cause the correct entry of information for the business information system.

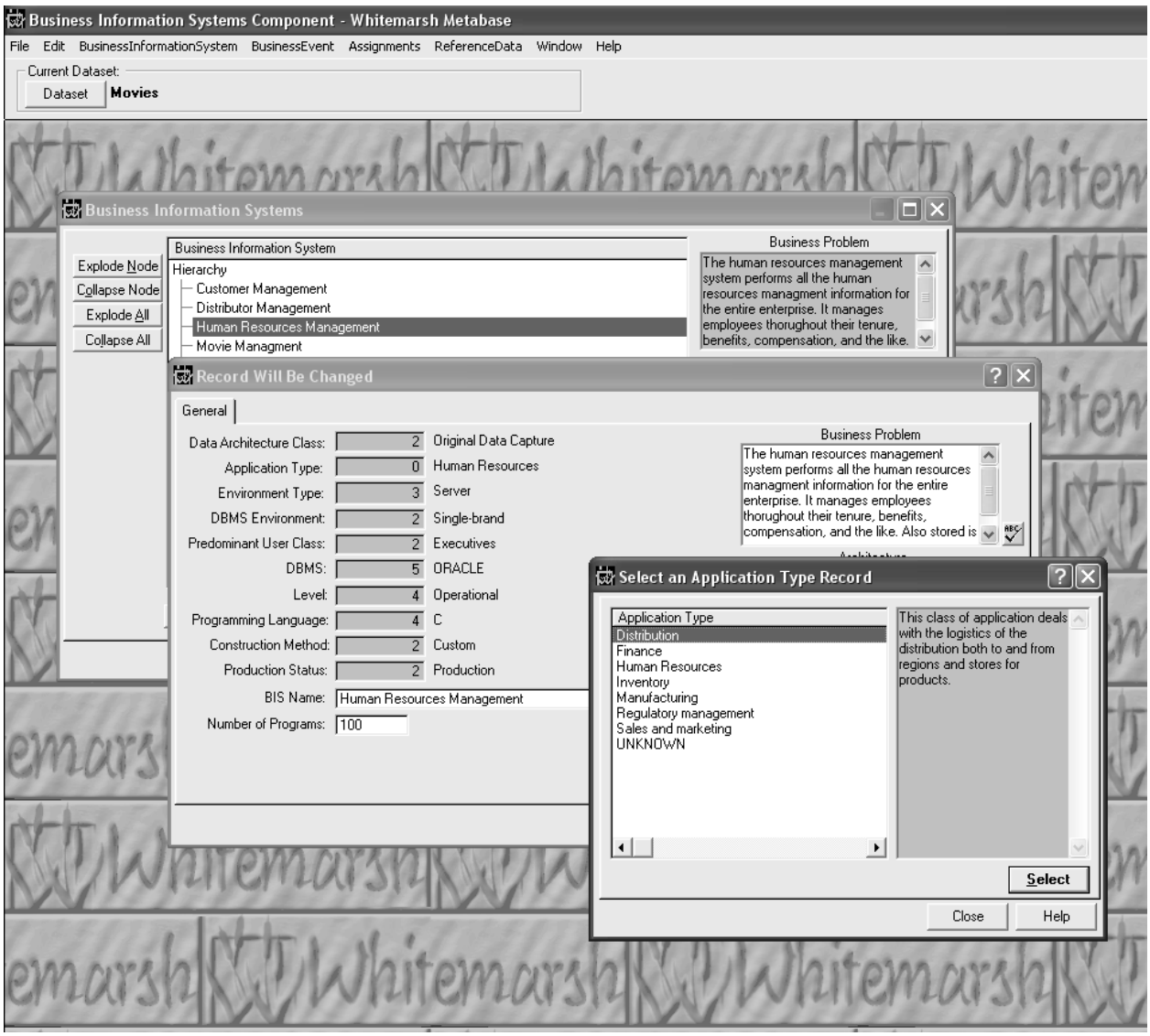

Figure 8. Selecting Data Architecture Class for the Human Resources System.

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6.2.1.2 Business Information System Database Object Assignments

Figure 10 lists the assignments between business information system and database object information systems. In this example, the assignment is between the Customer Management System (left side, tag one) that operates on data within the Movie Sales database schema, and the Movie Rental Transaction Creation database object information system of the database object, Movie Rental. The plans, problem, and architecture of the Customer Management system is shown. Additionally, the descriptions for the Movie Rental database object and the Movie Rental Transaction creation database object information system is also shown. The exact process details of either the business information system or the database object information system are outside the scope of this window. This is the association window.

The assignment is accomplished by tagging one business information system, tagging one or more database object information systems, and then pressing the build button. The result of the assignment is shown in the bottom browse.

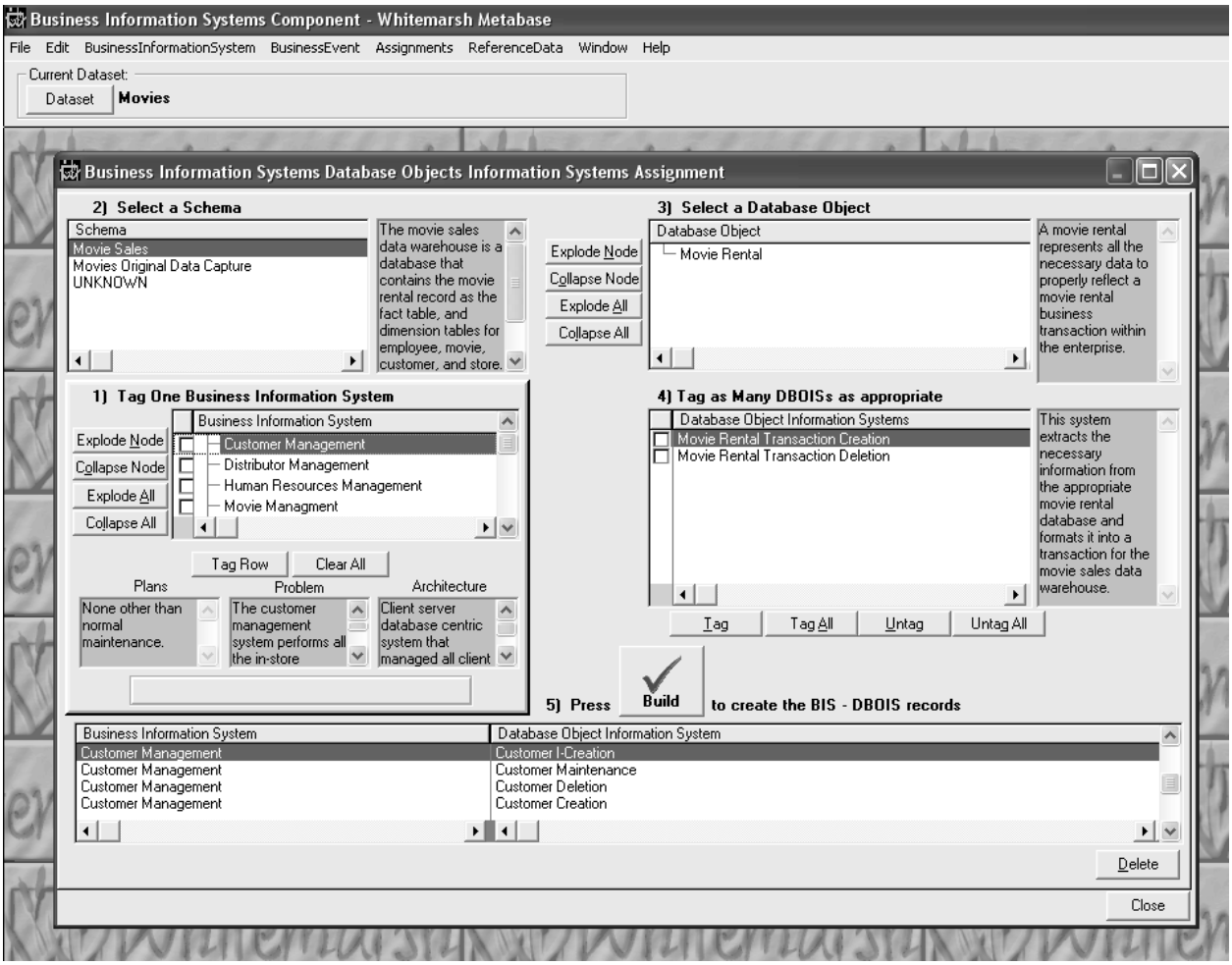

Figure 9. Business Information System to Database Object Information System Assignment.

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6.2.1.3 Business Information System View Assignment

The relationship between a business information system and the database with which it interacts is through a view. Figure10 presents the association of a the business information system and database view. In this example, the business information system, Movie Management is being associated with the view, ODC Movie view. Note that there are currently no descriptions for the views. These would be created in the View screens of the View Data Modeler module.

The assignment is accomplished by tagging one business information system, tagging one or more views, and then pressing the build button. The nature of the interaction between the view and the business information system can be changed between input and output via the Change Role button.

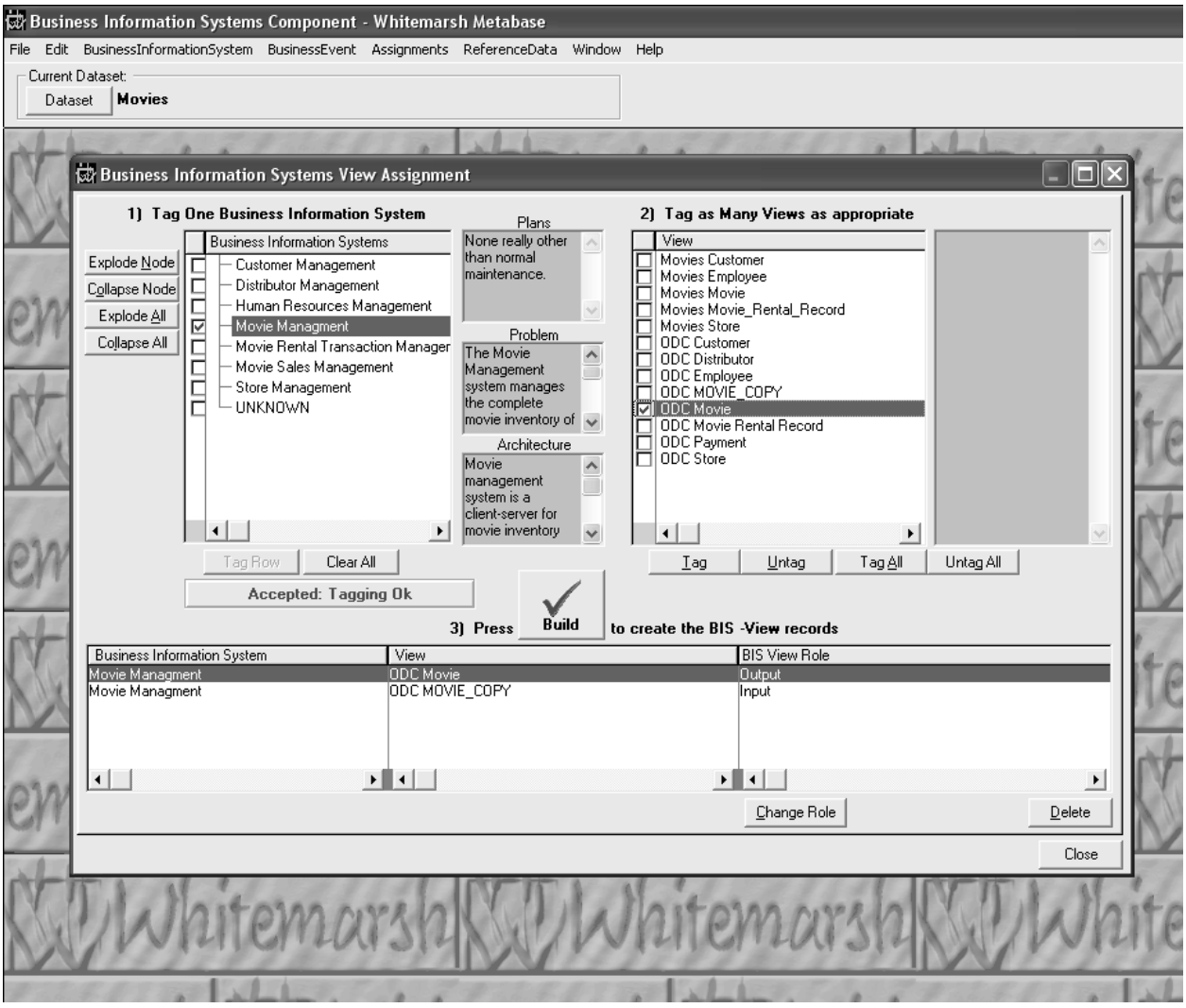

Figure 10. Business Information System View Assignment.

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6.2.2 Business Events

The full definition of business events involves:

- Business Event Assignments
- Business Events Update
- Business Event Cycles
- Calendar Cycles
- Business Event Cycle Assignment to a Business Event
- Calendar Cycle Assignment to a Business Event

6.2.2.1 Business Event Assignment

A business event within the context of the metabase and the Whitemarsh methodology is the intersection of a business function with a business information system. The assignment of the business function is additionally within the context of a highlighted mission and organization. Figure 11 presents the business event assignment window.

To assign a business information system and thus create the business event, first identify and then tag the business information system. Then isolate the mission, the organizations associated within the mission, then the function within the mission's organizations. Tag one or more of the functions. Then press the Build button. At that point, the business event records are created.

At the bottom of the assignment window is the business event update button. Once pressed, the Business Event update screen as depicted in Figure 12 is shown. The name of the business event can be changed. Initially the name is defaulted to the name of the Function. Additionally, at the bottom of the update screen are the two data entry fields, Business Even Cycle Id and Calendar Cycle Id. If Business Event Cycle Id is set zero then, when the Tab key is pressed, a Business Event Cycle Structure screen, like Figure 13, is presented. When the Business Event Structure tree is traversed to then find the appropriate Business Even Cycle within the correct context, the Select button pressed and then the Business Event Cycle is allocated to the Business Event.

The process for selecting the appropriate Calendar Cycle is the same. Figure 14 presents the Calendar structures.

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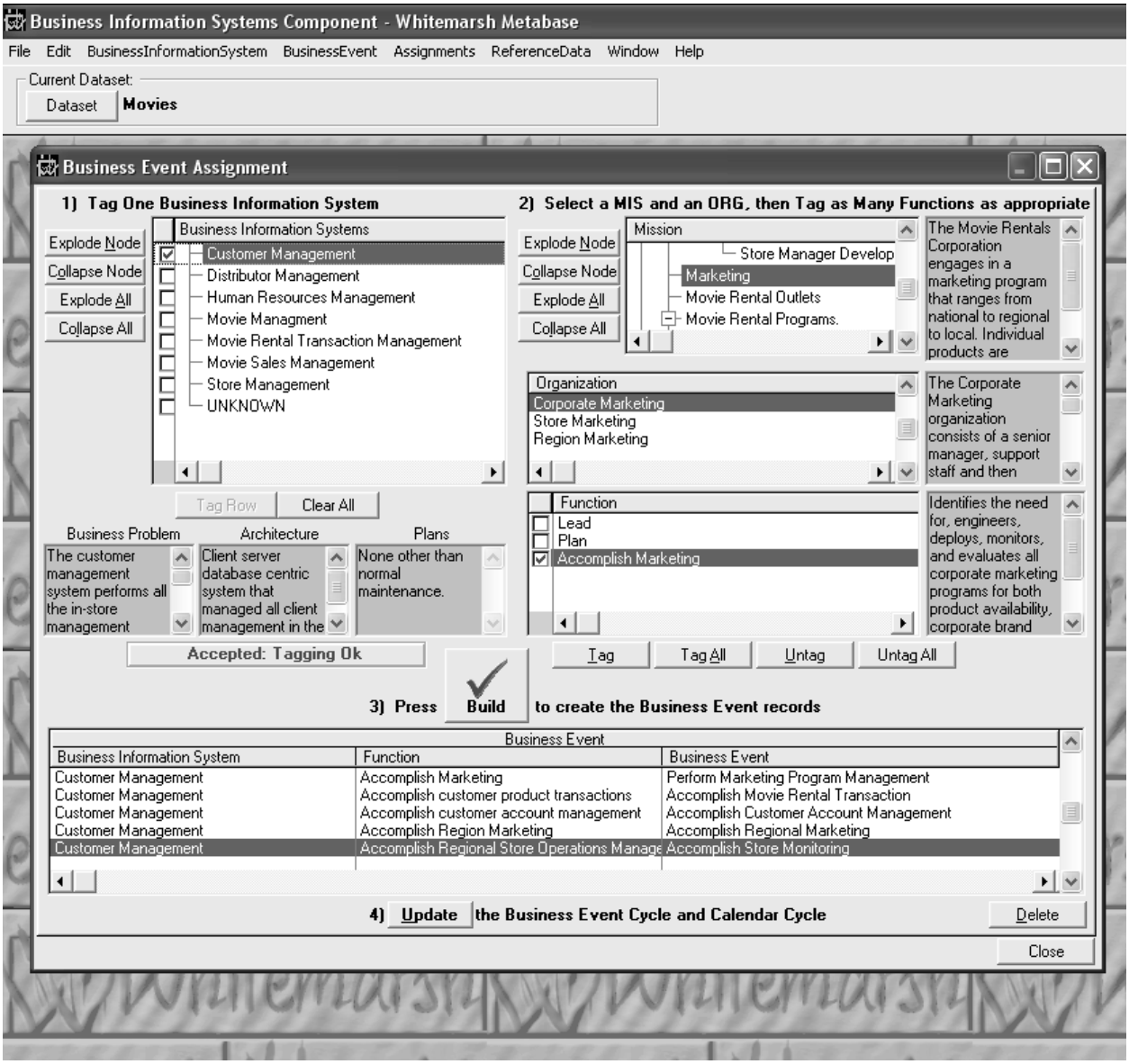

Figure 11. Business Event Creation.

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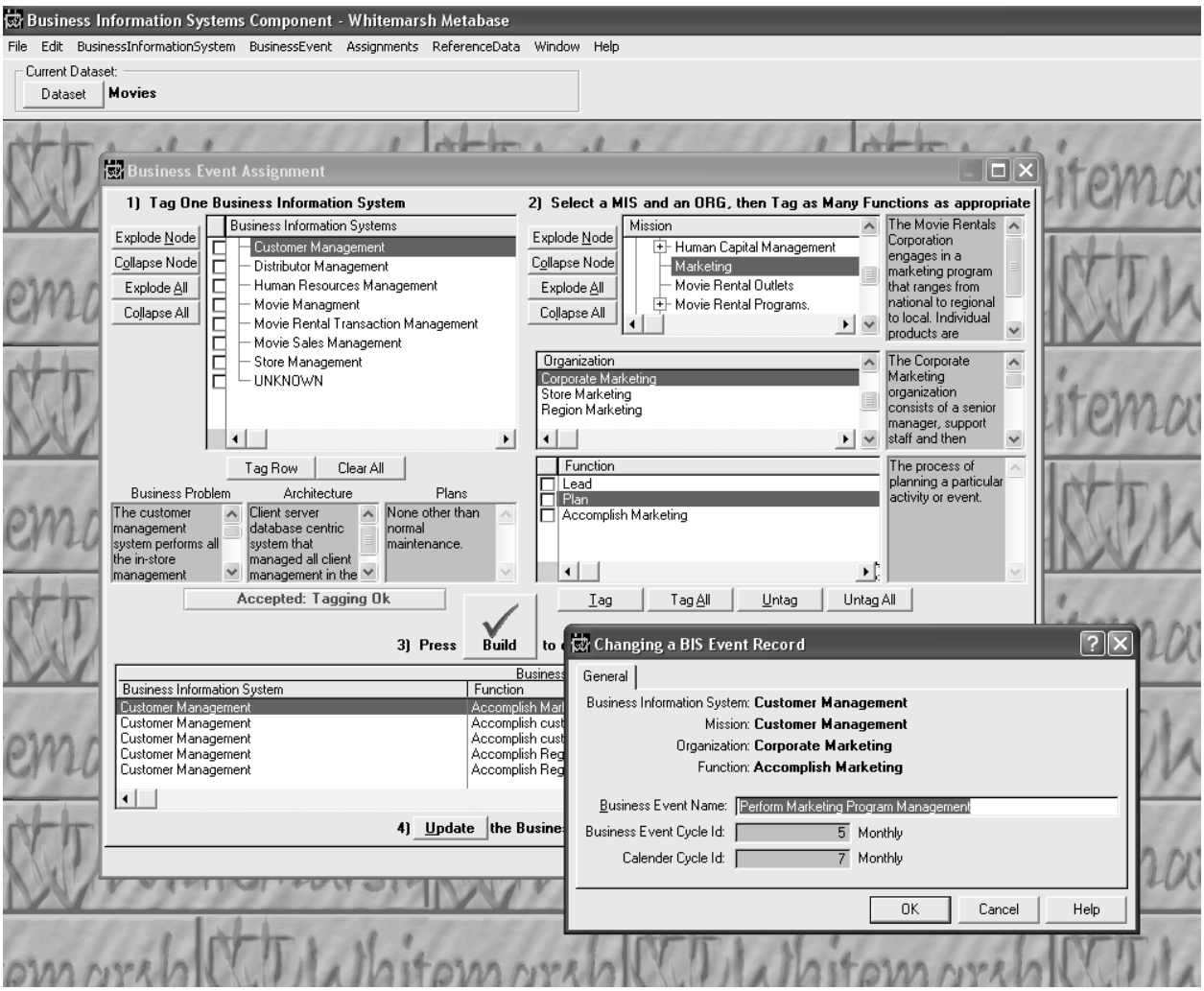

Figure 12. Business Event Update Screen.

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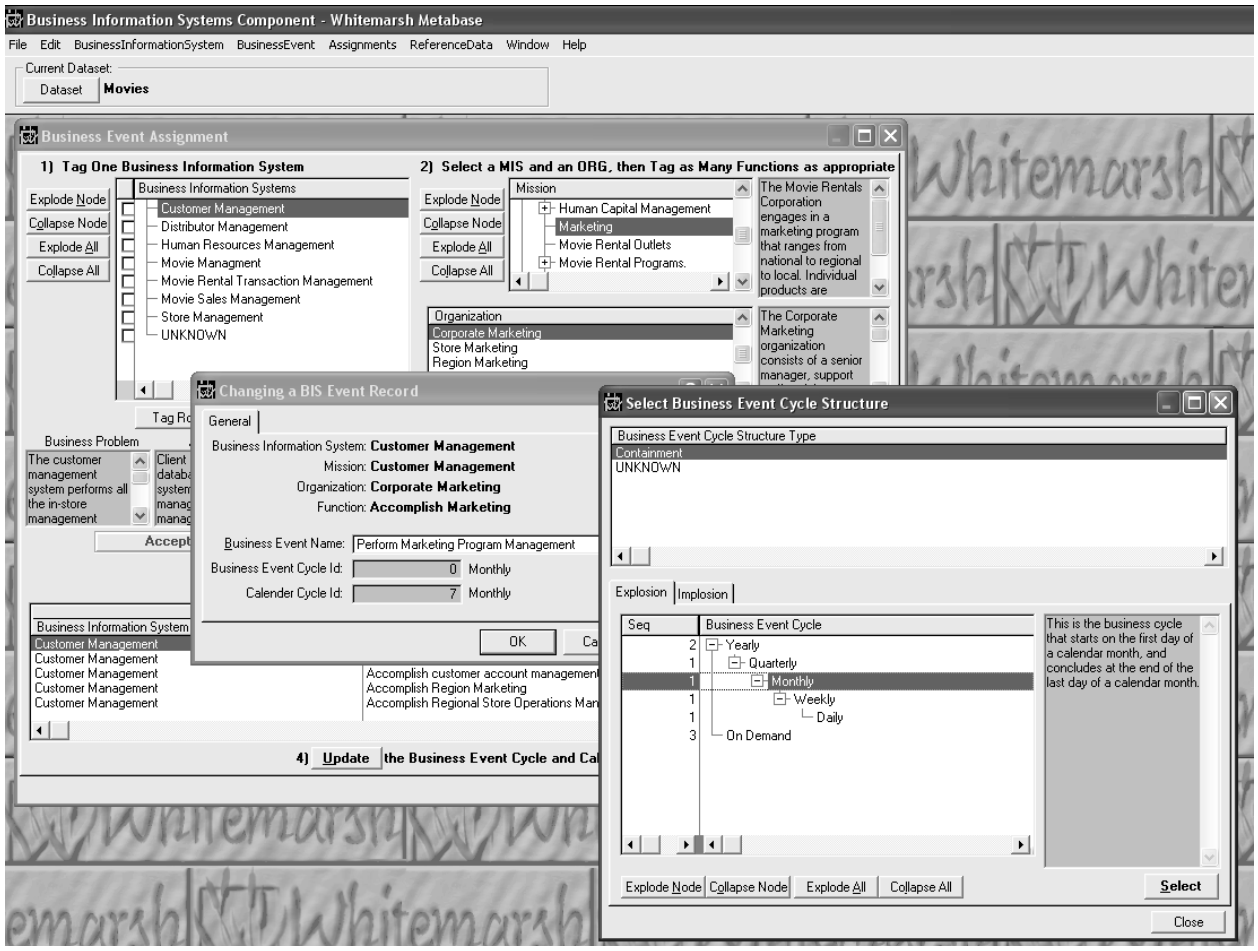

Figure 13. Selecting a Business Event Cycle for a Business Event.

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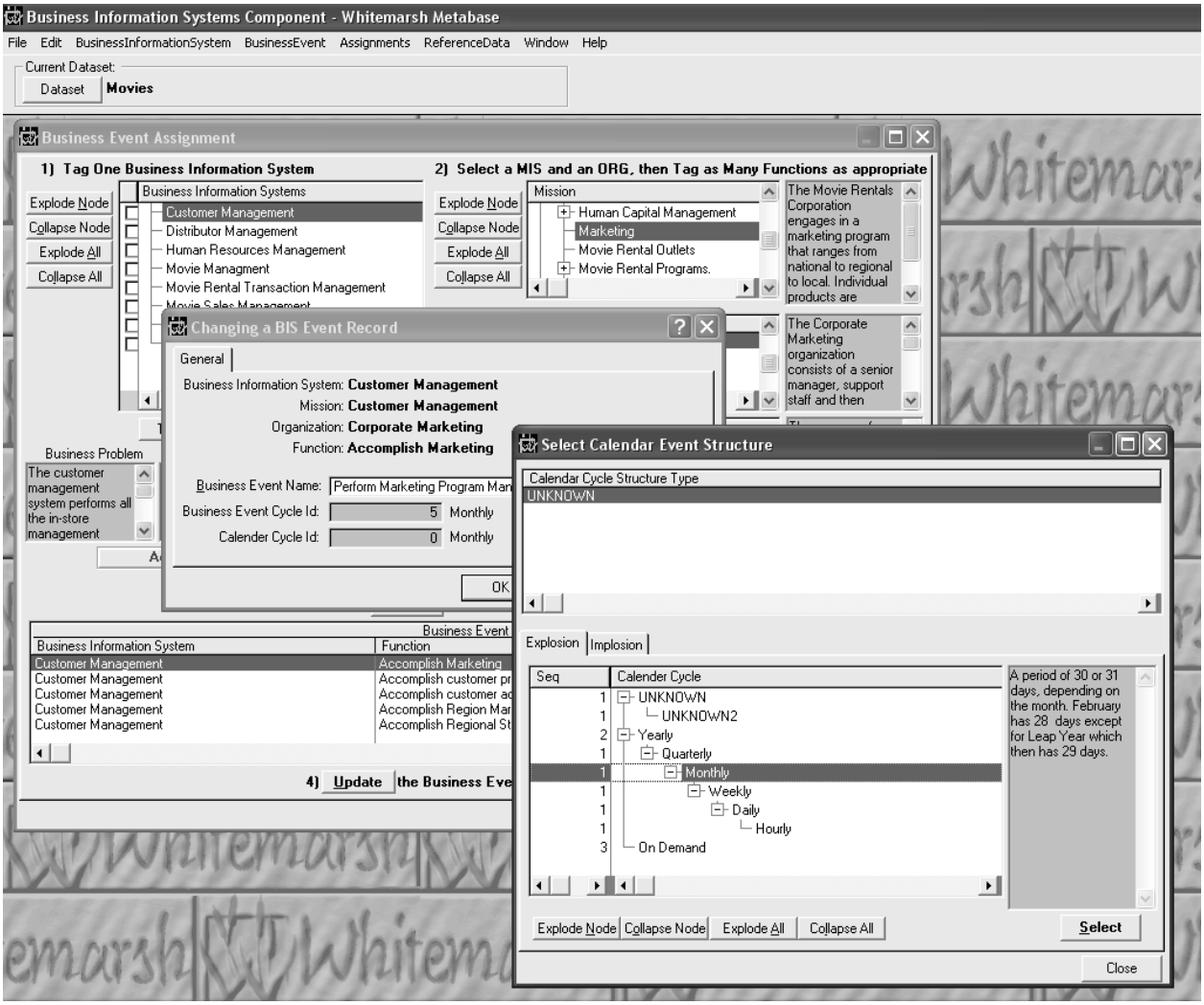

Figure 14. Selecting a Calendar Cycle for a Business Event.

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6.2.2.2 Business Event Update

Once the business event is created, the specific business event cycle and calendar cycle can be identified. This is accomplished by selecting a Business Event from Figure 15, and then pressing Update. Once pressed, the Business Event update screen, which is the same as the update screen contained within Figure 12 is presented. The name of the business event can be changed. Initially the name is defaulted to the name of the Function.

Additionally, at the bottom of that update screen are the two data entry fields, Business Even Cycle Id and Calendar Cycle Id. If Business Event Cycle Id is set zero then, when the Tab key is pressed, a Business Event Cycle Structure screen, like Figure 13, is presented. When the

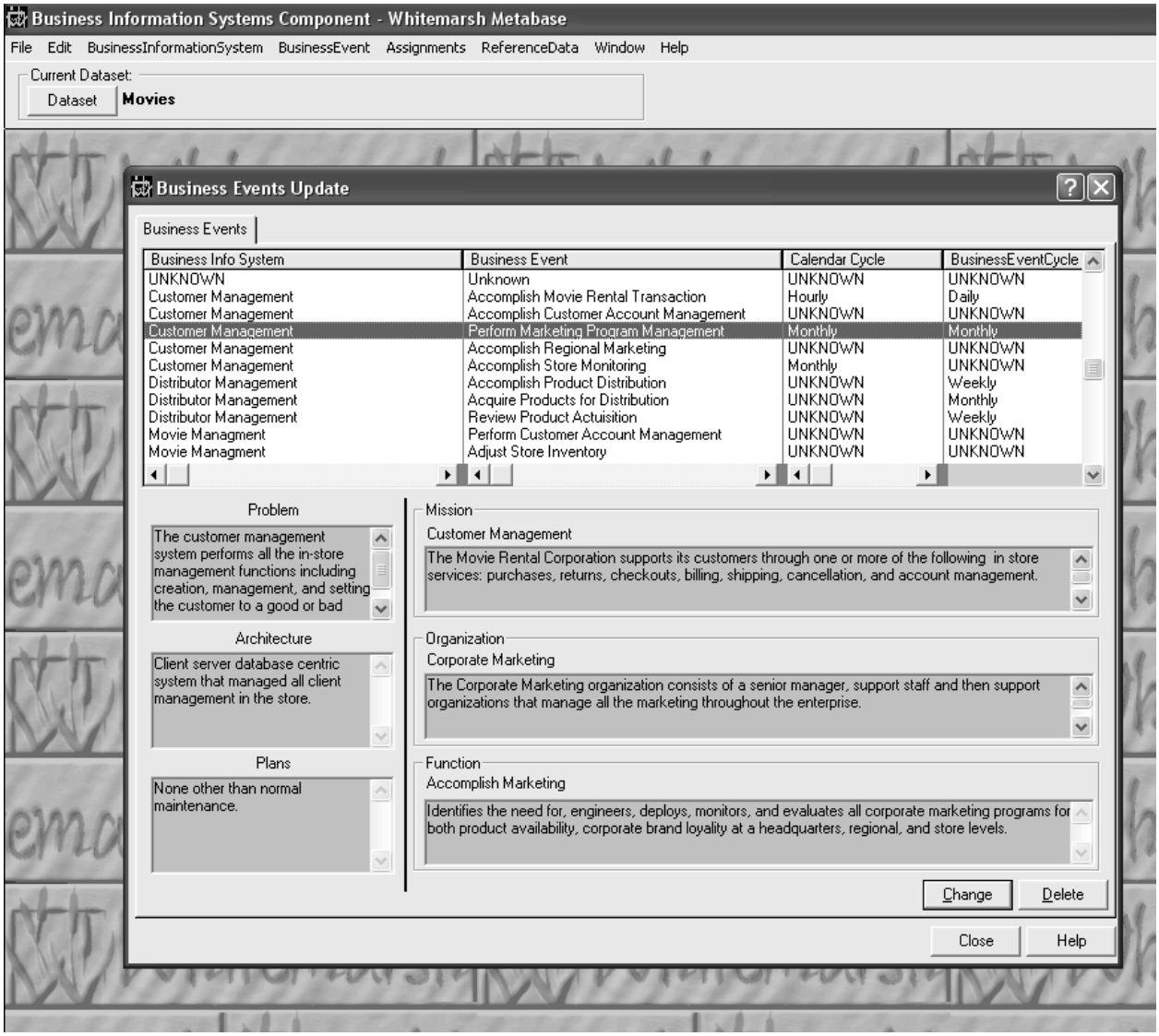

Figure 15. Business Event List for Updating.

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Business Event Structure tree is traversed to then find the appropriate Business Even Cycle and the Select button pressed then the Business Event Cycle is allocated to the Business Event.

The process for selecting the appropriate Calendar Cycle is the same. Figure 14 presents the Calendar structures.

The processes for creating Business Event Cycles and Calendar Cycles is presented in the next several sections.

6.2.2.3 Business Event Cycles

Business Event Cycles consist of:

- Business Event Cycle
- Business Event Cycle structures
- Business Event Cycle structure types

6.2.2.3.1 Business Event Cycle

Business event cycles are cycles of collections of business events. For example, the Finance Cycle, the Market Planning Cycle, the Invoice Payment Cycle, and the Hiring Cycle. It is during the accomplishment of the business event cycle that business events are performed. And, the accomplishment of the business event is execution of one or more business information systems.

Business Event Cycles, shown in Figure 16, are independently created. A review of this list shows that these business event cycles are generally of two classes: functional and temporal. Both, and for sure other kinds are acceptable. Figure 17 presents the data update form for inserting, deleting or changing a Business Event Cycle.

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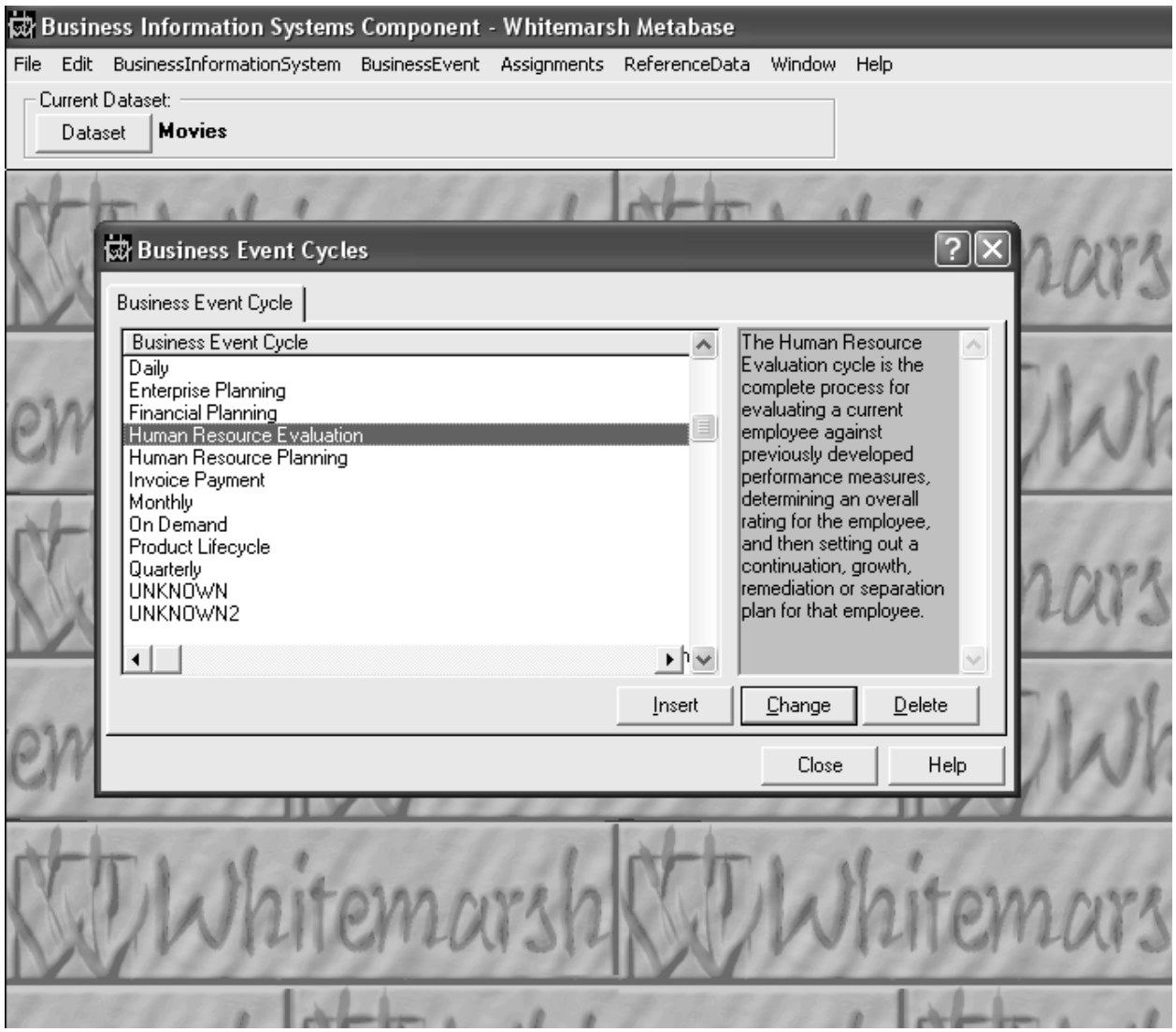

Figure 16. Business Event Cycles.

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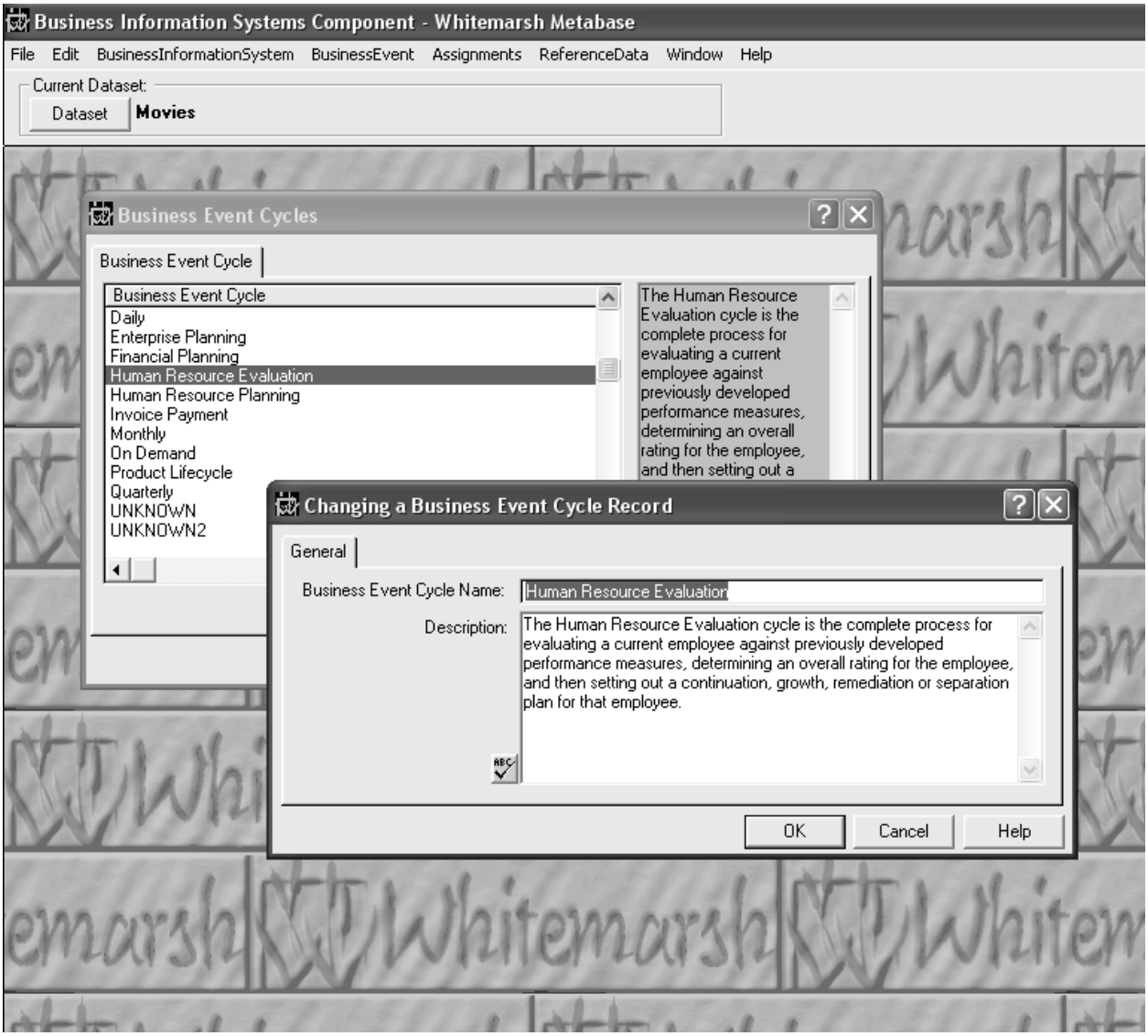

Figure 17. Business Event Cycle update.

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6.2.2.3.2 Business Event Cycle Structures

Business Event Cycles can exist singly or in hierarchies, or networks. In the last case, Business Event Cycles form a traditional bill of materials data structure.

Figure 16 presents a set of Business Event Cycles. These are not displayed within structures, that is, Quarterly within Annual. To create a structure among a collection of Business Event Cycles, select the menu item, Business Event Cycle Structure. Figure 18 presents the current set of Business Event Cycle Structures. If, after highlighting the appropriate Structure Type row, there are no appropriate structures, press the Insert button so that Figure 18 is presented. There are two tabs. Explosion and Implosion. An explosion is a collection of "active tense" relationships, Year contains Quarter contains Month, etc.

Implosion is the reverse. Month is contained in Quarter in Year. Figure 18 shows a existing set of Business Event Cycle structures. In this example, the same Business Event Cycle, Yearly, is contained in two other Business Event Cycles, itself and Financial Planning. Hence, the bill of materials.

When a new Business Event Cycle is to be inserted within an existing Business Event Cycle Structure, the name is highlighted and the Insert button is pressed, a screen like Figure 19 is presented. The specific Business Event Cycle that is desired as the contained Business Event Cycle is highlighted and then the select button is pressed. In this particular example, (as shown in Figure 19), Human Resource Evaluation was highlighted as the parent, and On-Demand was inserted as the child. The message at the bottom of the Select window indicated that the insert process is OK. At that point, press the Select button. The three cases that are automatically screened out are presented in the BOM/SFR user guide.

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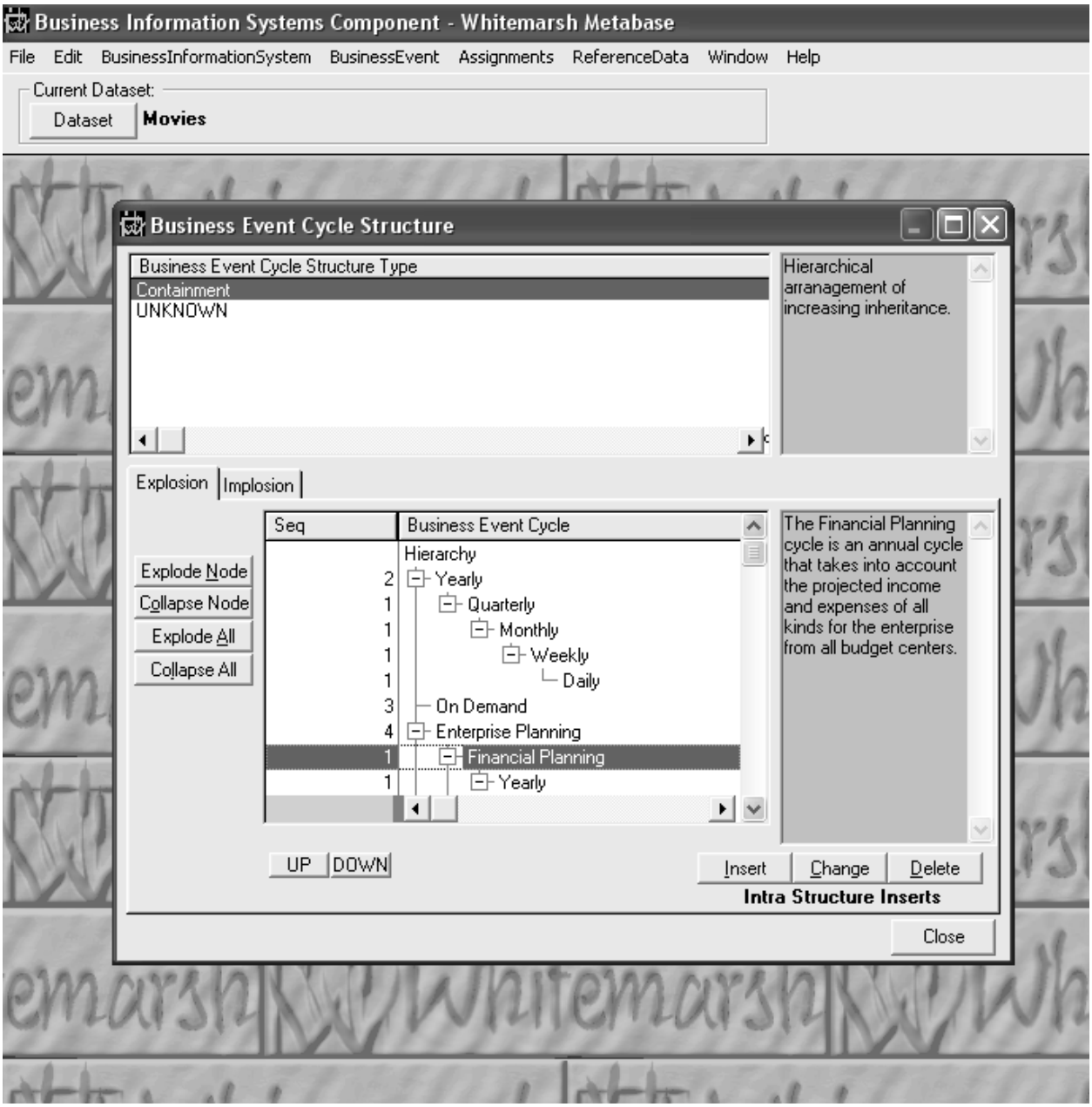

Figure 18. Business Event Cycle Structures.

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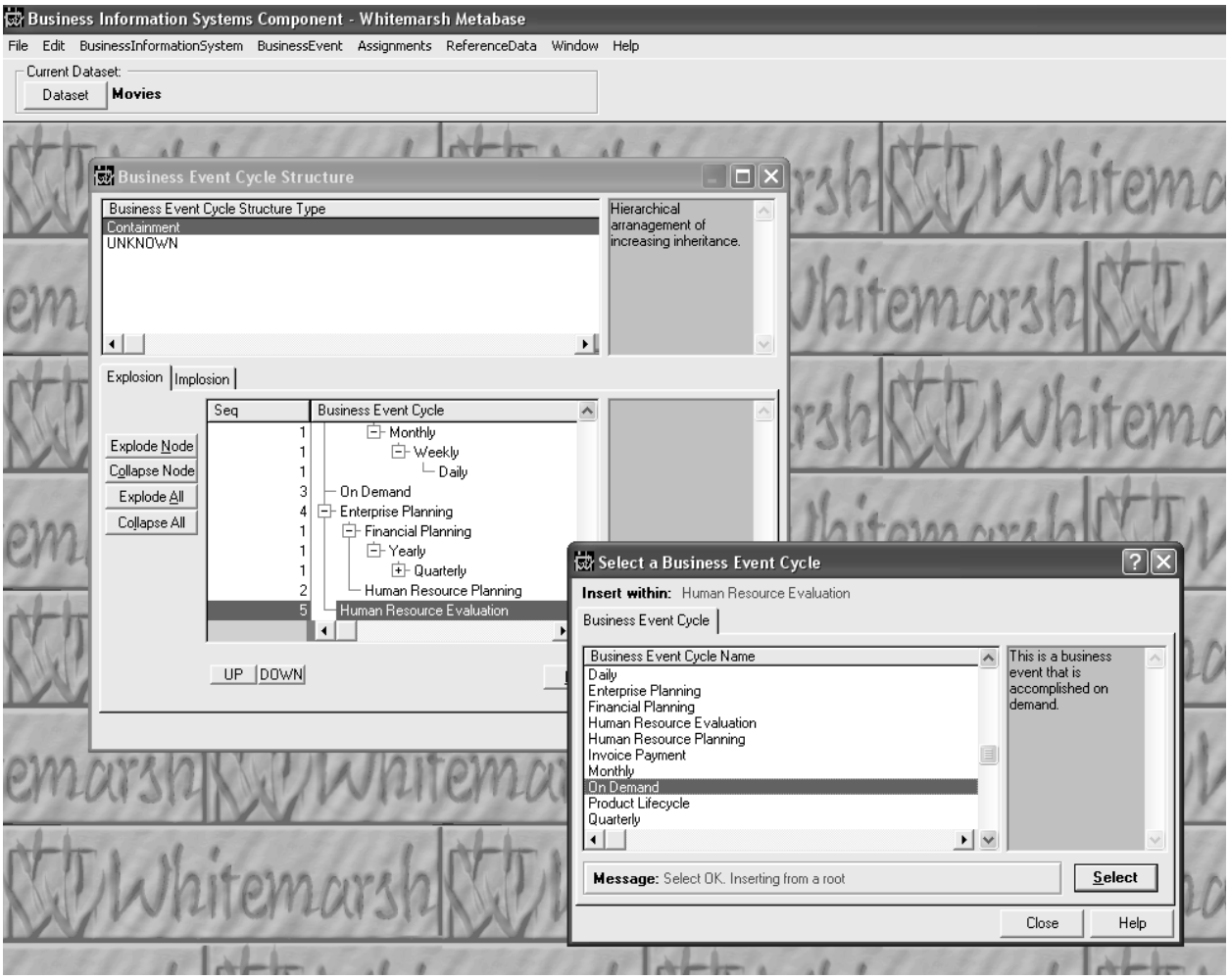

Figure 19. Inserting a Business Event Cycle into a Business Event Cycle Structure.

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6.2.2.3.3 Business Event Cycle Structure Types

The Business Event Cycle structure type is a way of distinguishing one collection of business event cycle structures from another. Figure 20 presents the current list. If two different classification hierarchies are interconnected, it may be that the intersection is distinguished from the others by means of a different Business Event Cycle structure type.

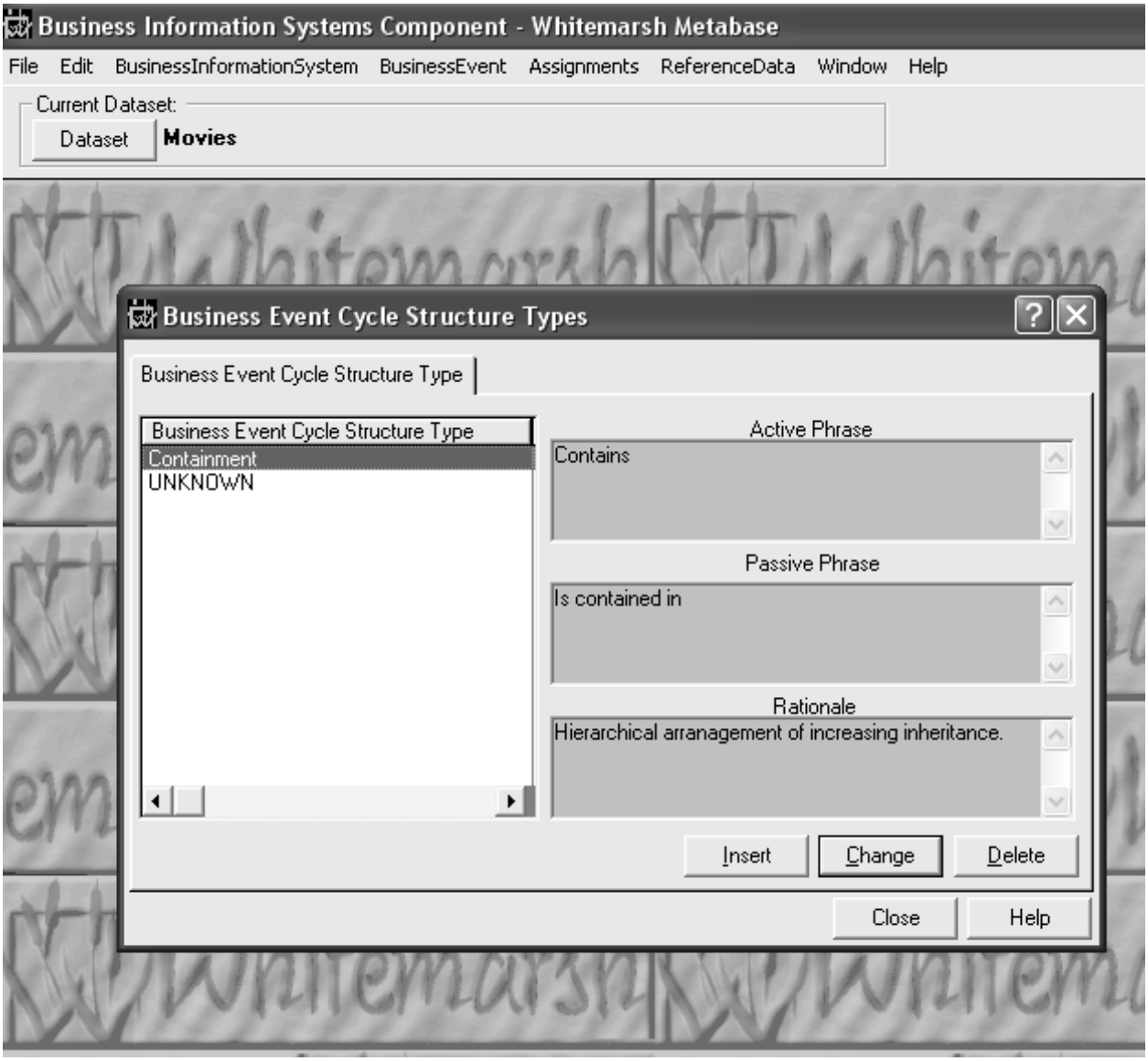

Figure 20. Business Event Structure Types.

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Figure 21 presents the Business Event Cycle structure type update form. Not only is the name and description of the Business Event Cycle structure type provided, so too is the active phrase and the passive phrase. The active phrase is employed by the Whitemarsh metabase system when a down-ward structure is presented. For example, <parent> contains <child 1>, <child 2>, ..., <child n>. The passive phrase enables the reverse phrases to be presented. That is, <child 2> is contained in <parent>.

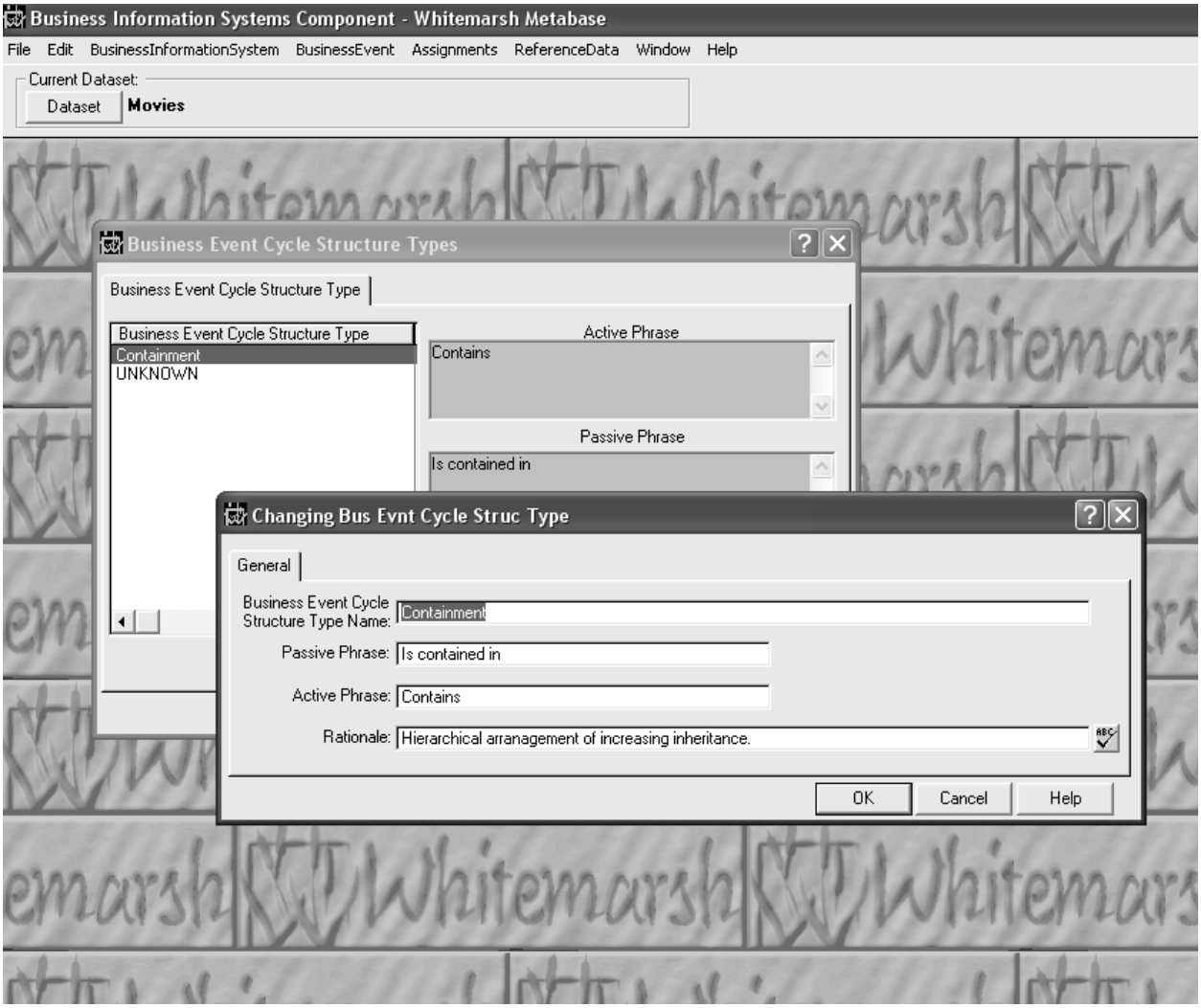

Figure 21. Updating a Business Event Cycle Type.

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6.2.2.4 Calendar Cycles

A Calendar Cycle is a scheme through which business events are set within calendars. Calendar Cycles consist of:

- Calendar Cycle
- Calendar Cycle structures
- Calendar Cycle structure types

6.2.2.4.1 Calendar Cycle

A Calendar Cycle is a mechanism through which one or more data elements is classified. Calendar Cycles, shown in Figure 22, are independently created and then assigned to one or more business events. Figure 23 presents the data update form for adding, deleting or changing a Calendar Cycle.

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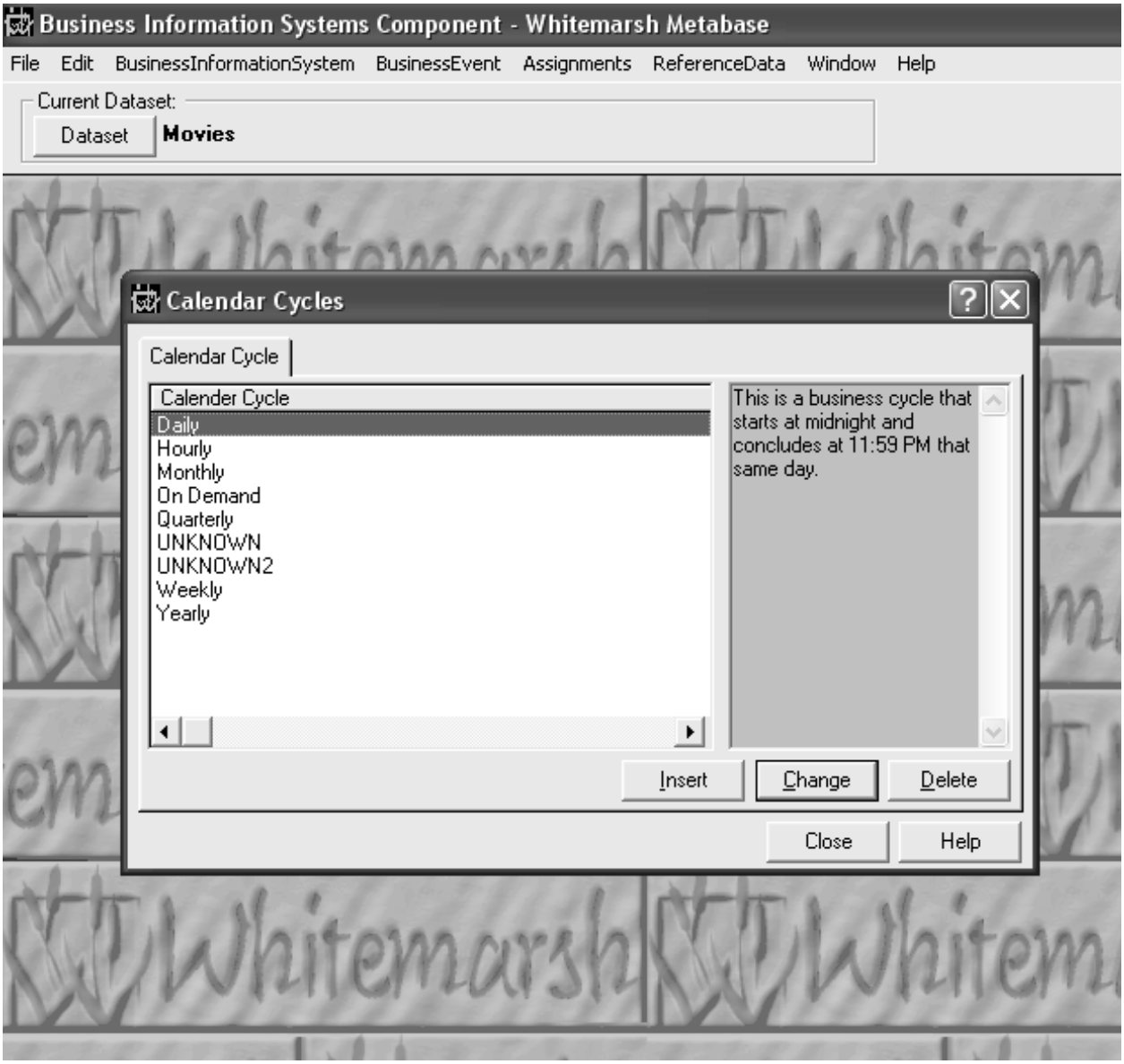

Figure 22. Calendar Cycles.

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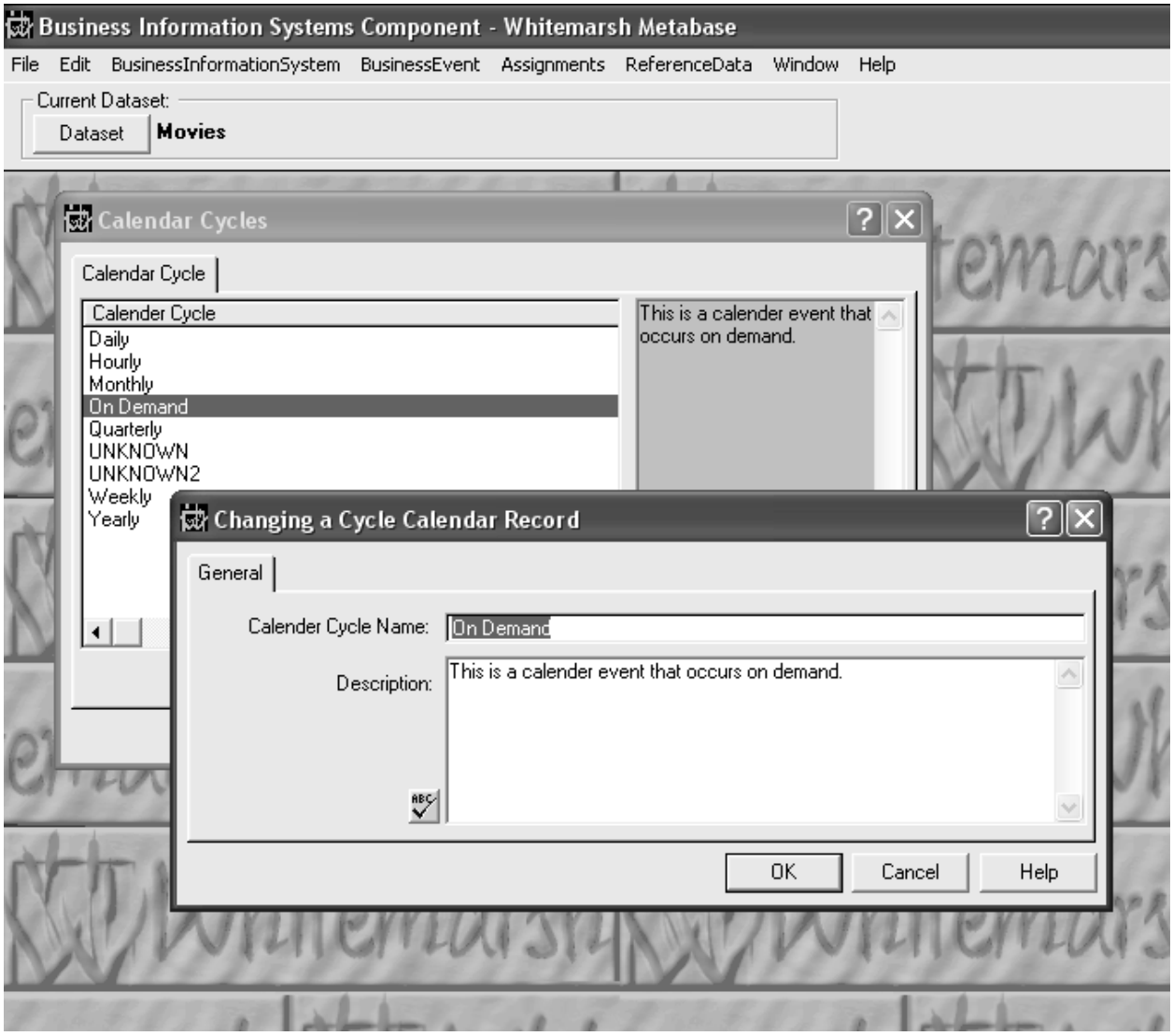

Figure 23. Calendar Cycle Update.

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6.2.2.4.2 Calendar Cycle Structures

Calendar Cycles can exist singly or in hierarchies, or networks. In the last case, Calendar Cycles form a traditional bill of materials data structure.

When a new Calendar Cycle is to be inserted within an existing Calendar Cycle Structure, the name is highlighted and the Insert button is pressed, a screen like Figure 25 is presented. The specific Calendar Cycle that is desired as the contained Calendar Cycle is highlighted and then the select button is pressed.

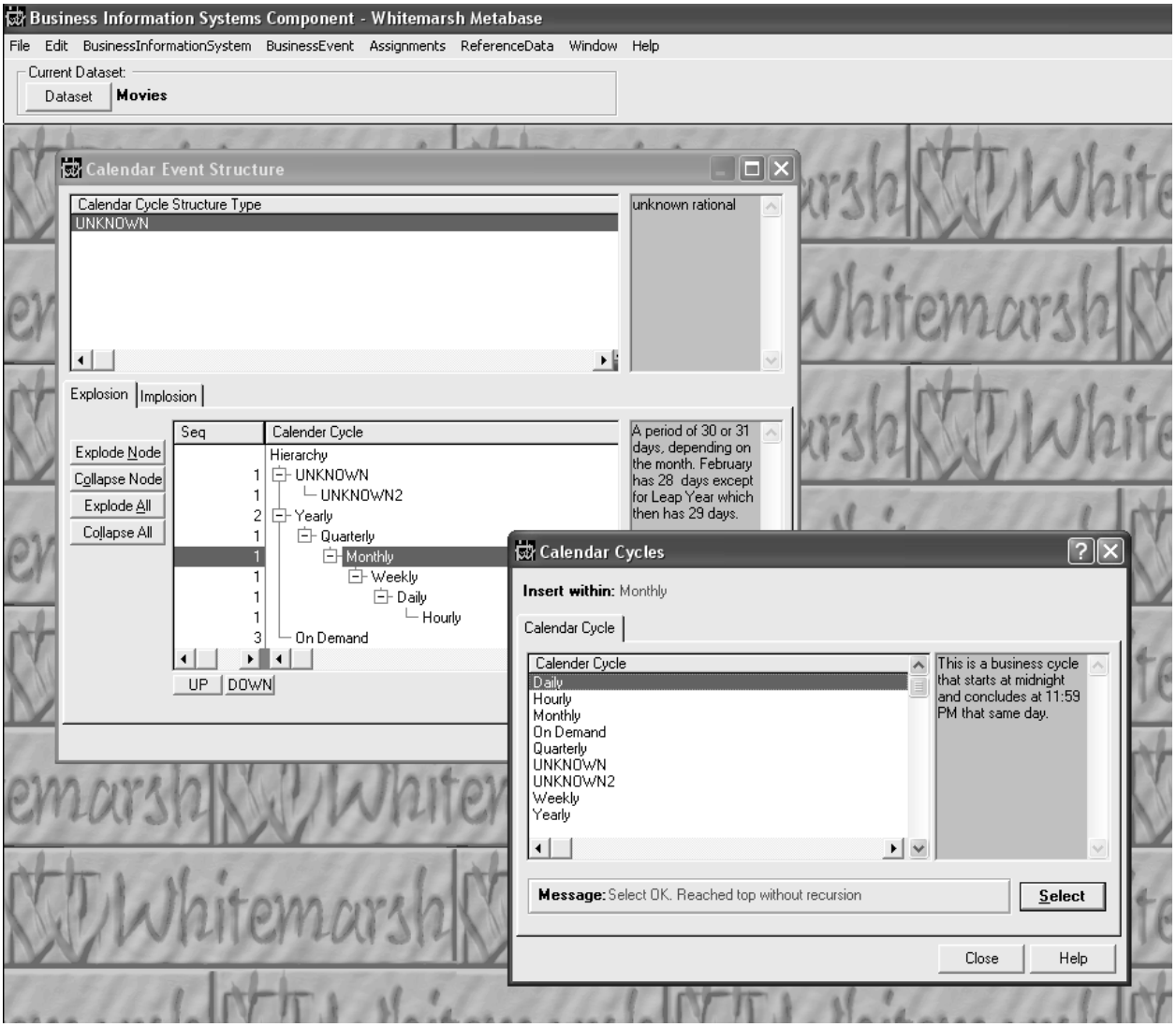

Figure 24. Inserting a Calendar Cycle into an existing Calender Cycle Structure.

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6.2.2.4.3 Calendar Cycle Structure Types

The Calendar Cycle structure type is a way of distinguishing one classification structure from another. Figure 24 presents the current list. If two different classification hierarchies are interconnected, it may be that the intersection is distinguished from the others by means of a different Calendar Cycle structure type.

Figure 25 presents the Calendar Cycle structure type update form. Not only is the name and description of the Calendar Cycle structure type provided, so too is the active phrase and the passive phrase. The active phrase is employed by the Whitemarsh metabase system when a down-ward structure is presented. For example, <parent> contains <child 1>, <child 2>, ..., <child n>. The passive phrase enables the reverse phrases to be presented. That is, <child 2> is contained in <parent>.

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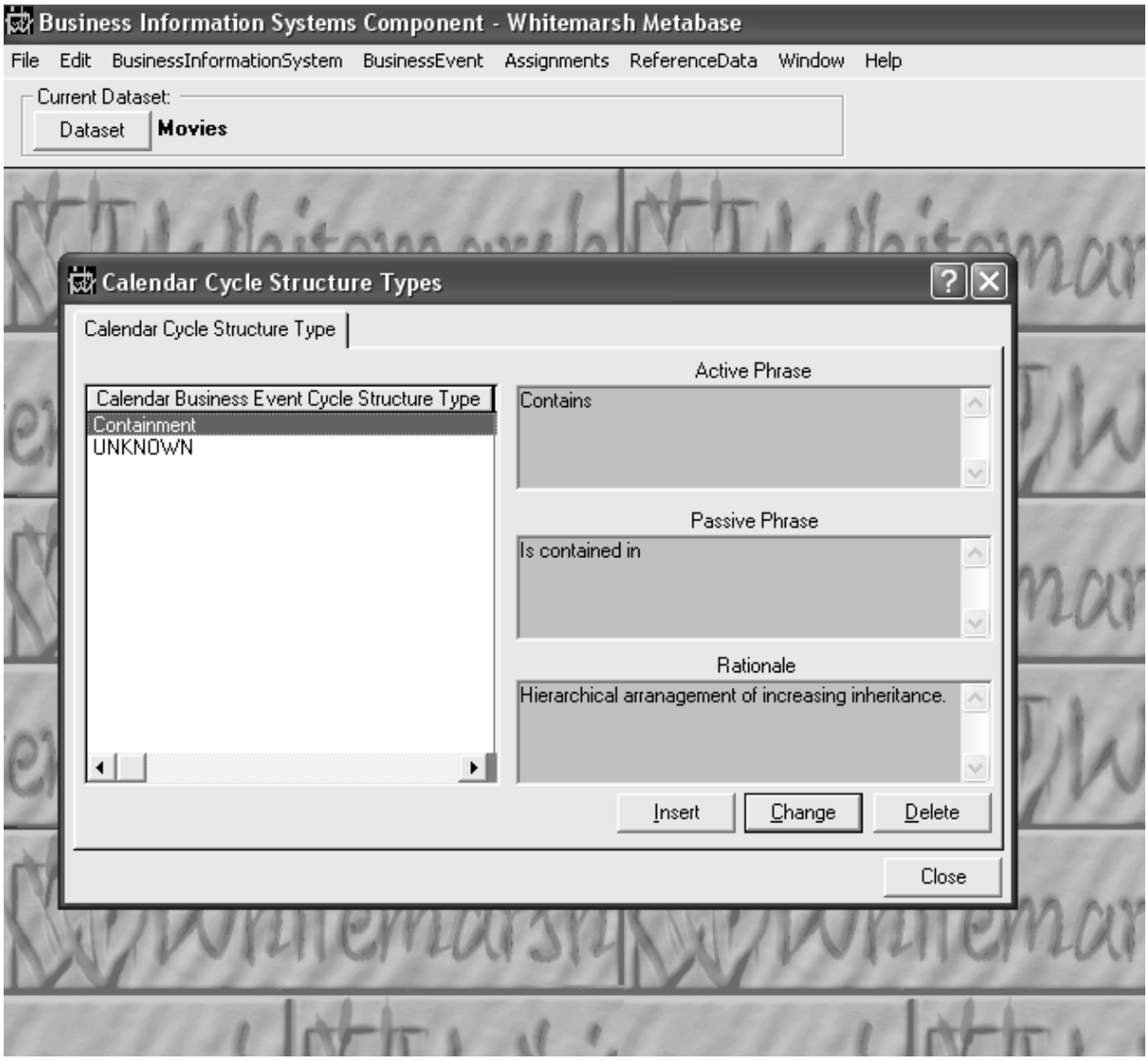

Figure 25. Calender Cycle Structure Types.

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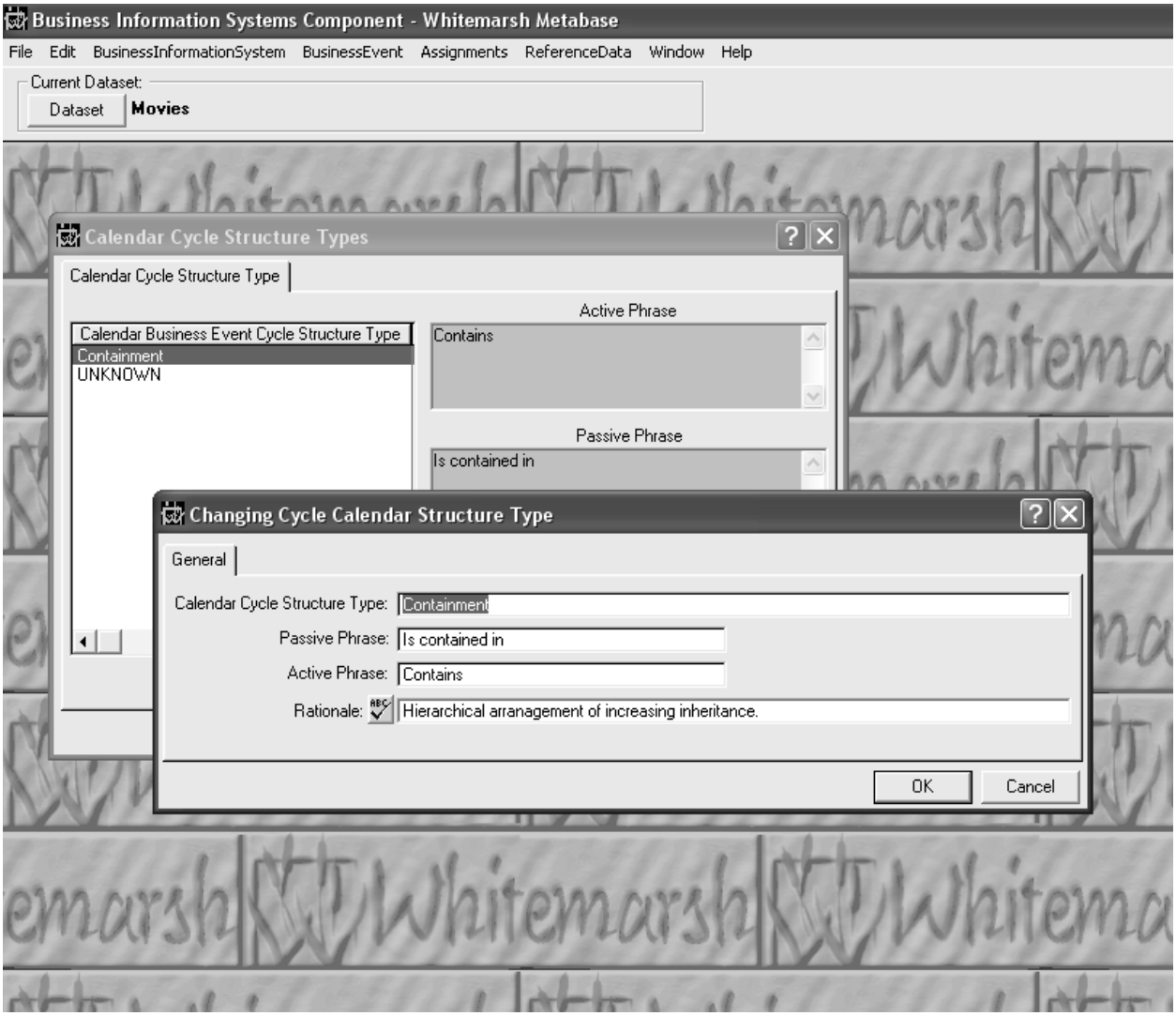

Figure 26. Calendar Cycle Structure Type update.

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6.2.2.5 Business Event Cycle Assignment to a Business Event

Business Event Cycle assignment to a business event can also be accomplished either through an assignment screen. The assignment screen is shown in Figure 27. In this particular example, the particular business event cycle, monthly, was identified and tagged. Then, the business event that is to occur monthly is identified by picking the right mission, then organization within the mission, then function within the mission-organization, and finally tagging the right business event within the mission-organization-function. Once this tagging is accomplished, the Update button is pressed. More than one business event can be tagged for updating to a tagged business event cycle.

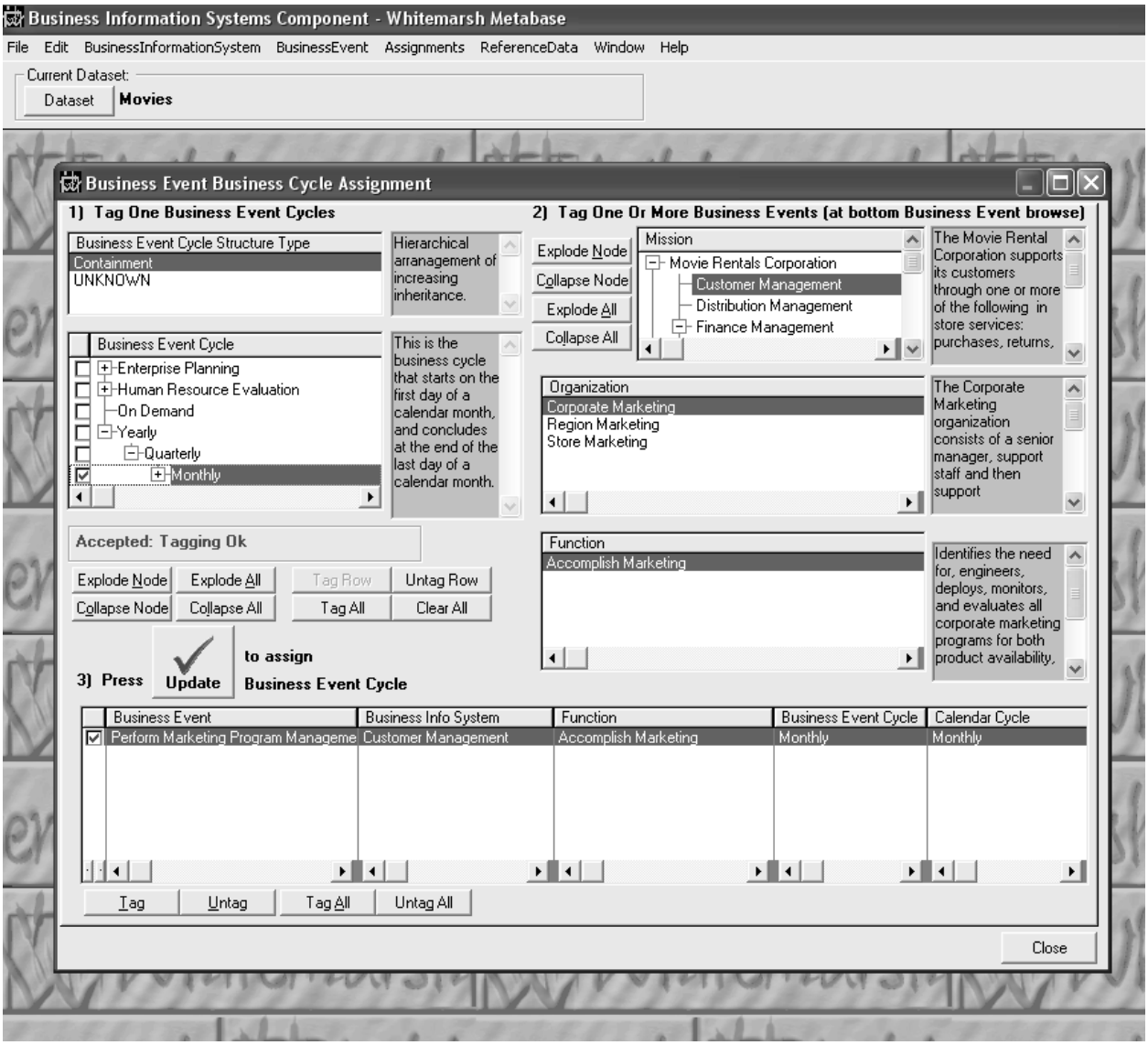

Figure 27. Business Event Cycle assignment.

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6.2.2.6 Calendar Cycle Assignment to a Business Event

Calendar Cycle assignment to a business event can also be accomplished either through an assignment screen. The assignment screen is shown in Figure 28. In this particular example, the particular calendar cycle, monthly, was identified and tagged. Then, the business event that is to occur monthly is identified by picking the right mission, then organization within the mission, then function within the mission-organization, and finally tagging the right business event within the mission-organization-function. Once this tagging is accomplished, the Update button is pressed. More than one business event can be tagged for updating to a tagged calendar cycle.

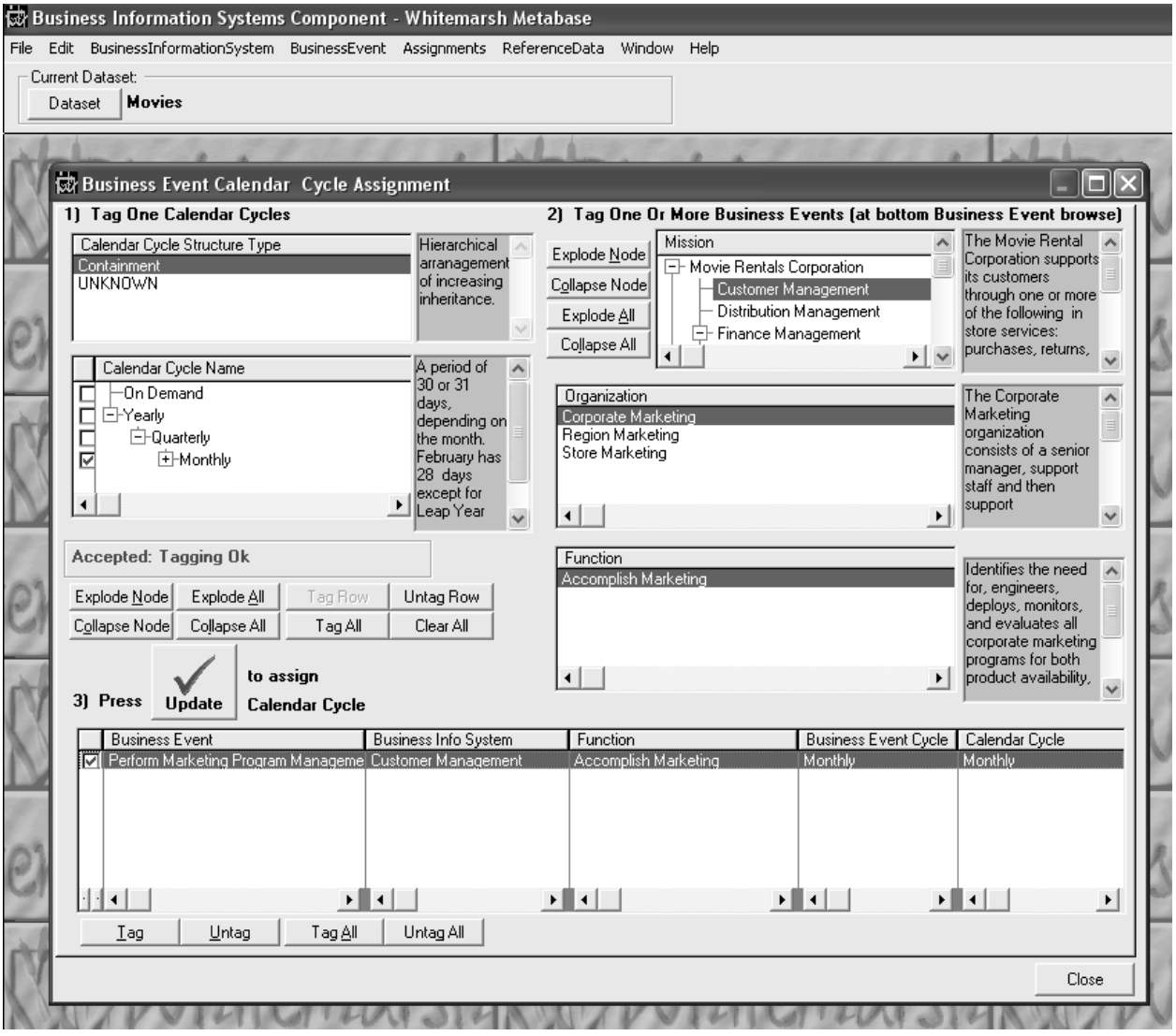

Figure 28. Calendar Cycle assignment.

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6.3 Assignment Data

The assignment of Business Information Systems to Resource Life Cycle Nodes is accomplished within the Resource Life Cycle metabase module.

6.4 Reports

Reports are accomplished through access to a particular metabase database instance through commercial report writers such as Crystal Reports. Whitemarsh provides about 100 such report templates for Crystal Report access from the Whitemarsh website.

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