



Documentation Framework

IT-Documentation including business structures

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AUTHOR	Docusnap Consulting
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1. Introduction

This document describes the procedure for creating an independent framework for different IT documentation in the Docusnap documentation suite.

1.1 Where does a framework support?

With a framework, you can create your own documentation structure in Docusnap, i.e. your own set of rules according to which documentation can be created. You are no longer forced to adhere to fixed specifications of the manufacturer, in terms of sequence or structure. How can this support you in your work?

Depending on what exactly you want to depict (an OBASHI model, an IT procedure, a process-IT dependency, etc.), you can create this documentation directly in the Docusnap software with the help of a framework. You do not need to use additional visualization software for your documentation. You need a certain flexibility for this and that is exactly what a framework offers you. Docusnap provides a kind of construction kit for flexible documentation design. Why is this important?

It is important because you can now use master data once it has been created or inventoried consistently for all documentation. You no longer need to store data twice in different systems. Use the same master data in all your documentation. This reduces the error rate due to incorrect data entry and ensures the necessary Data actuality.

1.2 Concepts of frameworks

Before the next chapter presents an example of an IT-Documentation created using a framework, a few terms are first clarified.

Framework

At the highest level, a framework forms a self-contained unit for documentation. Within the framework, all required views, levels, elements, structural elements, groups, and properties are linked together.

Views

Views provide the possibility to create different views of the same data within a framework. Views can be used to create multiple representations to connect the same data from different perspectives. Depending on whether data is to be displayed according to functional or technical aspects, for example.

Levels

Layers provide a visually coherent representation of elements. Within a framework, a layer, once created, can be used in different views with all its assigned elements.

Structural elements

With structural elements, additional sublevels can be created in each level. These sublevels are mainly used to improve the structure of elements.

Elements

Elements are always assigned to a specific level. In principle, elements are always linked to objects from the Docusnap inventory tree via the editor.

Groups

Groups can be used to combine several elements into optical or logical units. This also serves to improve visualization and, in certain scenarios, the technical correctness of the display.

Properties

If required, various properties can be stored for elements to describe them further or to document characteristics. Properties can be freely defined, e.g. "downtime" for a server. They are always defined for one level and are thus assigned to all elements assigned to it.

1.3 Example of documentation

In this section, a framework is explained using an example. The aim of this example documentation is to establish a relationship between the business processes of a company and its IT landscape. The aim is to analyze which hardware and software is required for which activities in the business processes.

With the help of this framework, "the two worlds" are connected in the company. The connections and dependencies between business and IT are documented. Thus, the IT department receives a specification for the availability of its IT systems, for example, via the availability requirement for business processes. Precisely because these direct connections are analyzed and visualized.

With the help of this documentation, the following questions should be able to be analyzed:

- Which business processes are affected when which IT systems fail?
- Why should you invest in certain IT systems? Which business processes are affected? Where is it worth investing?
- Which processes could be adapted to save IT systems? Which hardware could possibly be switched off? Which software maintenance could be cancelled?
- Which systems represent a bottleneck in the IT infrastructure? Which systems should therefore be made particularly available so that business processes are not affected or are affected as little as possible in the event of failures?

The following figure shows an example of such an IT-Documentation, from the organizational unit at the top down to the individual hardware that must ultimately be available so that the employees can complete their tasks.

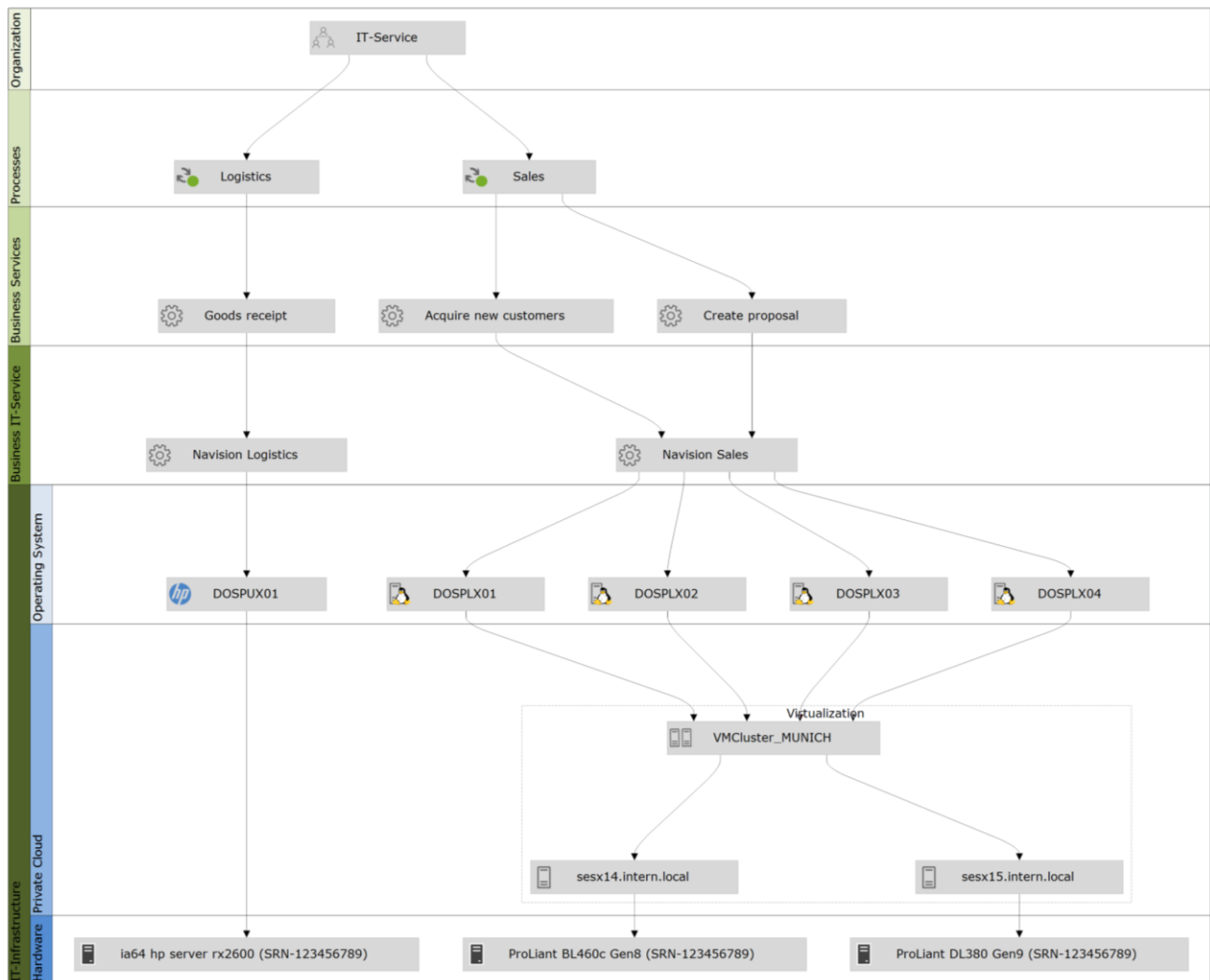


Fig. 1 - Example Framework

The *IT Service* department is located at the upper level **Organization**. This department is involved in the two **Processes** *Logistics* and *Sales*, where they carry out certain process steps.

The **Business Services** *Goods receipt*, *acquire new customers* and *Create proposal* are required for these two processes. These are Business Services that the department performs within the two processes, which have an impact on the business activities of the company and require support from IT systems.

The support provided by the IT systems mentioned above is mapped by the **Business IT-Service** *Navision Logistics* and *Navision Sales*.

The **Business IT-Service** *Navision Logistics* on the **System** *SHUX0001* is required for the **Business Service** *Goods receipt*. This system is installed directly on the **Hardware** *ia64 hp server rx2600*.

For the other two **Business Services** (*Create proposal*, *acquire new customer*), the **Business IT-Service** *Navision Sales* is used.

Navision Sales is hosted on the **Systems** *DOSPLX01*, *DOSPLX02*, *DOSPLX03* and *DOSPLX04*.

These four **Systems** are provided by the *VMWare Cluster Munich*.

This example could also be supplemented by the documentation of the network sockets and patch fields. If necessary, it could be documented which processes are affected if a circuit in the electrical distribution system fails, since it is possible to see which IT systems are connected there and which processes in turn depend on these IT systems. You see with the documentation using the framework, completely new possibilities are offered in the detailing and scope of your IT documentation.

1.4 How was the framework for the example created?

Using the previous example, let us look at how the framework in Figure 1 was created.

Framework

In the first step a new framework was created.

Views

After creating the framework, a new view was created. Views are used to model the relationships required for documentation without affecting other views. Since the functional dependency was documented here, this could be called a function view, for example.

Levels

Using layers, the elements created in the next step are grouped logically and functionally. They represent a graphical grouping of elements of the same category. Five levels have been created here to enable the dependencies between the processes and the IT landscape to be depicted in granular form.

Level 1 - Organization

In this level, the organizational unit involved in the processes of the subsequent level was documented. An organizational unit can always be a department, a team, or a complete business area.

Level 2 - Processes

This level lists the processes for which the documentation is created. Here, all processes of an organizational unit can be viewed for which support by IT systems is required. As digitalization continues, this will become the majority of processes, because hardly any business process can do without the support of certain IT systems today.

Level 3 - Business Services

Services are a functional bundling of activities in the processes. Here it is a matter of which services the considered organizational unit provides in the respective process.

When defining services, the question can always be asked: Which activities does the considered organizational unit perform? For example, a sales department often has the task of writing quotations, sending them and also following up on them by telephone or in writing. These can be individual services or services that this organizational unit performs for the company.

Level 4 - Business IT service

The Business IT Service is the application or service that supports the previously listed Business Service IT side. In other words, the business service uses the business IT service to perform its tasks.

Level 5 - IT Infrastructure

The IT infrastructure level is divided into operating systems, private cloud and hardware. This subdivision (by structural elements) was chosen on the one hand for reasons of better representation, and on the other hand to be able to display the functional dependencies correctly. The server operating systems and the associated

hardware or virtualization environment are divided here. This allows the interrelationships of the IT systems to be represented in a granular and functionally correct manner. Thus, it does not matter whether an operating system is installed directly on a hardware, virtualized in its own virtualization environment or available as a cloud solution. Every possibility should be represented in the framework. It is important that the operating system is mentally separated from the hardware.

Elements

Several elements were created in each level. Here, an organizational unit, two processes, three services and several servers and operating systems were created. After adding them to the framework, they were linked together accordingly.

In principle, elements come from the inventory area. They can be created there either manually or using the inventory function of Docusnap. Elements of type Organization, Process and Service can also be created directly using the editor and do not have to be created in the inventory area.

Group

To represent the virtualization environment, a group named Virtualization was created here and the three hosts and the cluster of this group were added.

It can be useful to combine individual elements within a level or structure element to form a group. An example of a grouping for virtualization would be the combination of several hosts into a cluster. This is technically correct because virtual machines can be added to either a cluster or a defined host. When added to a cluster, it is irrelevant on which hardware the machine is currently running, therefore it is also possible to link to a cluster.

Structural elements

As described above for the IT infrastructure level, three structural elements have been created: Operating Systems, Private Cloud and Hardware.

Depending on the complexity of the documentation, it may make sense to create further subdivisions in the respective levels for the sake of clarity. The structure elements can be used for this purpose.

2. Creation of documentation using frameworks

2.1 Creating a new framework

The first step in the creation of the documentation consists of creating a new framework.

You can create the new framework in the **Documentation - IT Documentation** area. From the action menu, choose either **New - Framework** or open the **editor** and create the framework there. Further editing of the framework takes place in the editor.

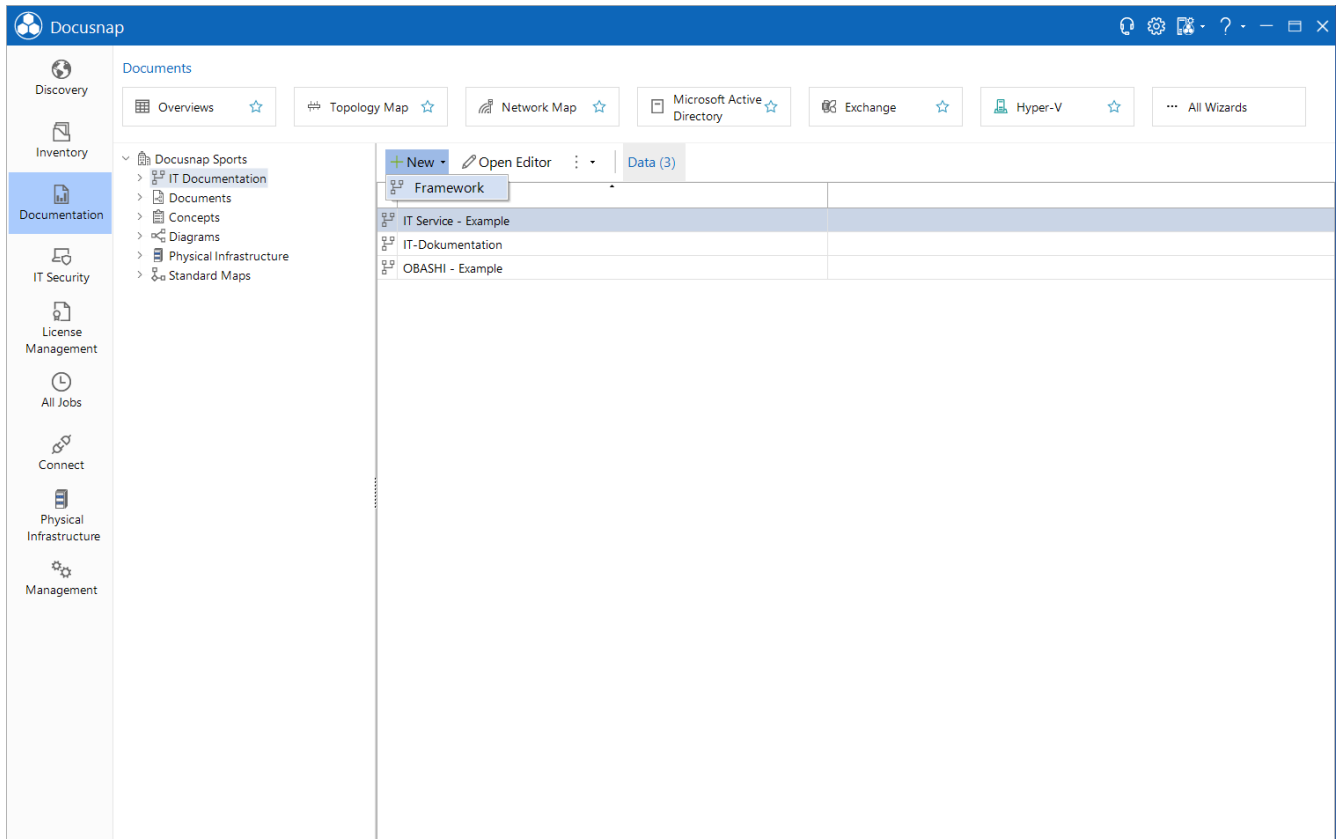


Fig. 2 - Creating a new framework

2.2 Creating views

Open the editor and add a new view to your framework using the button Add View.

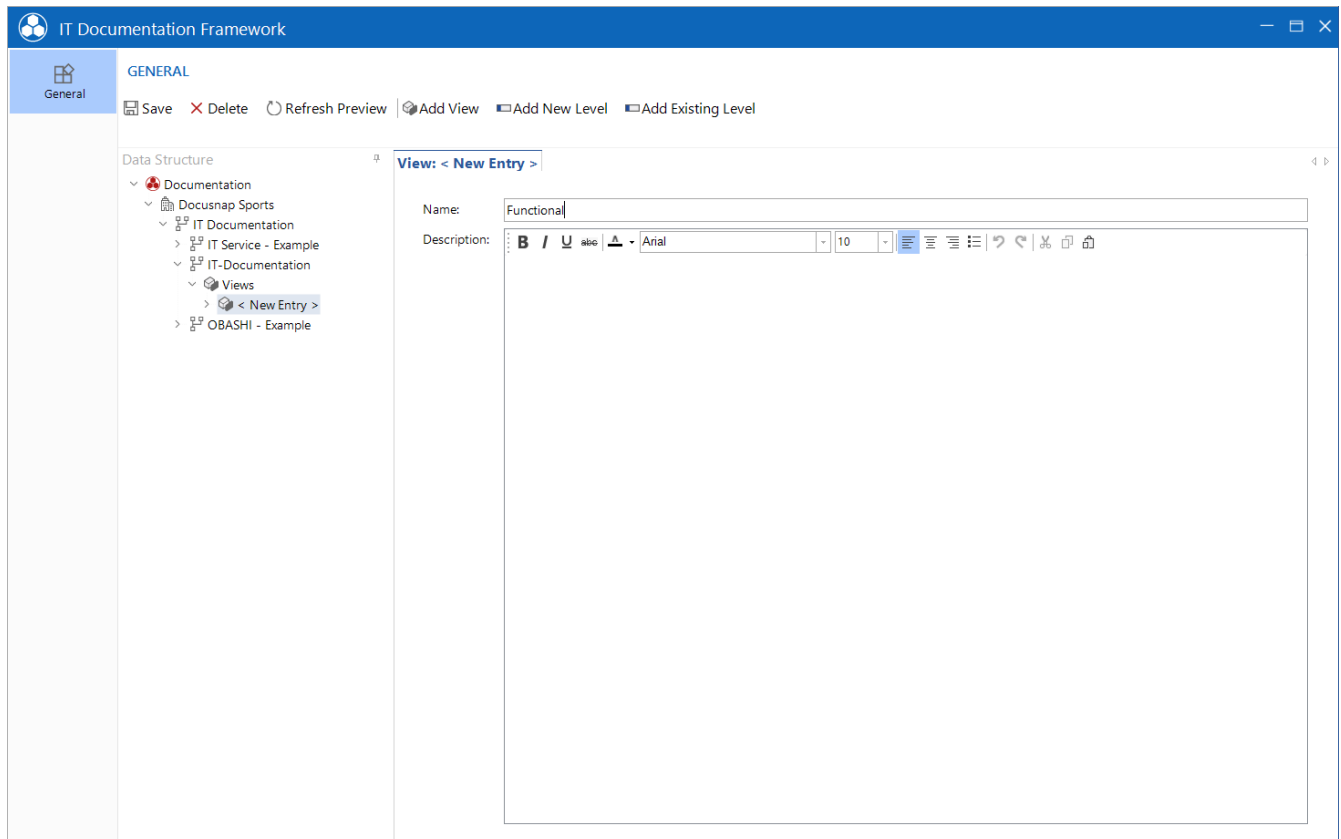


Fig. 3 - Creating a new view

After you create the new view, the Visualization window opens. This window visualizes you the progress of the framework directly. You can position it as you wish. To do this, select the title bar.

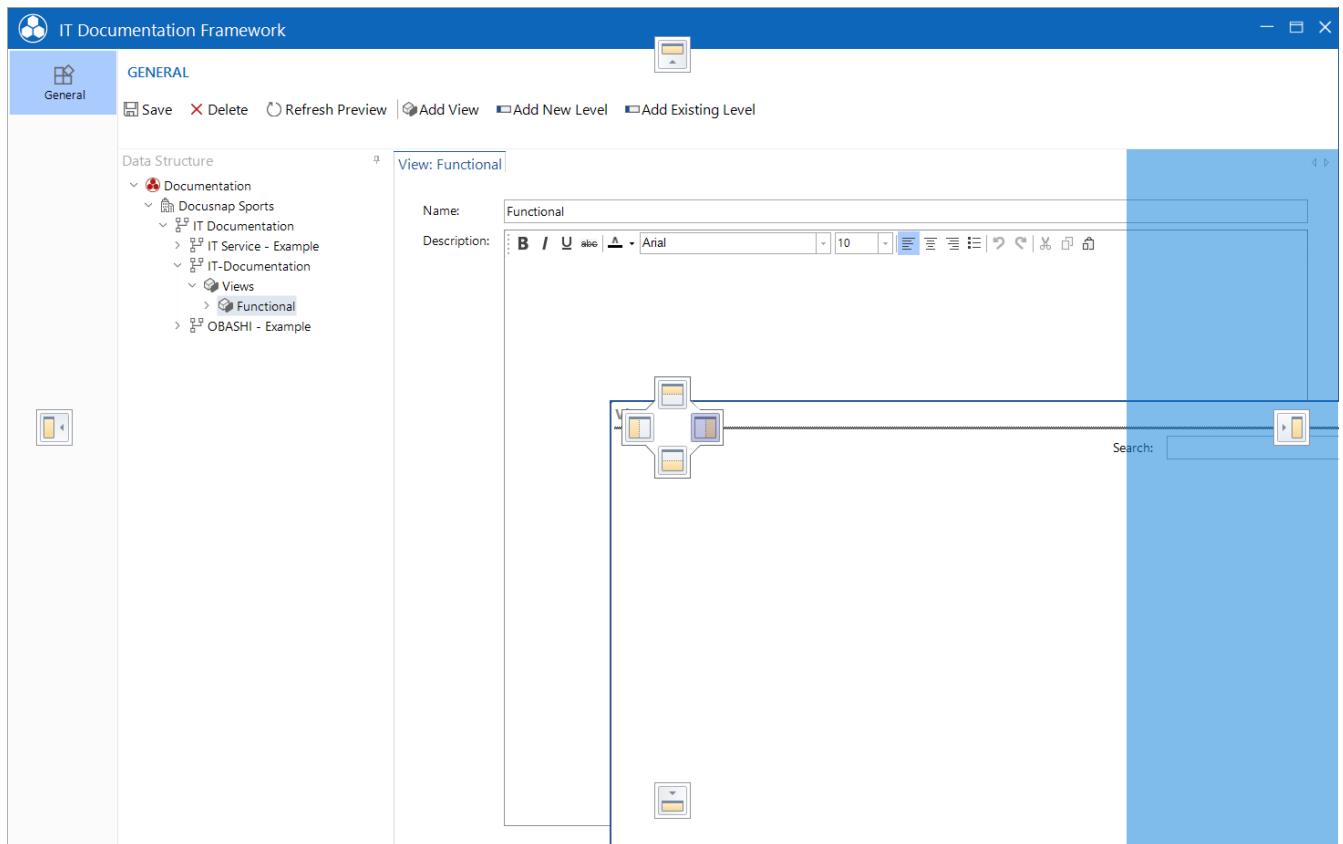


Fig. 4 - Choose the position of the visualization

2.3 Creating levels

In the Editor, click on the previously created view in the Data Explorer and click on **Add New Level** in the menu bar. Create all required levels. Note that you can only create a new level if you have selected the view.

- Organization
- Processes
- business services
- business IT service
- IT infrastructure

You can use the Sorting field to specify the order in which they are to be listed later. Start with the value 10.

Tip: For sorting, use steps of 10 instead of 1. This makes it easier to re-sort multiple levels.

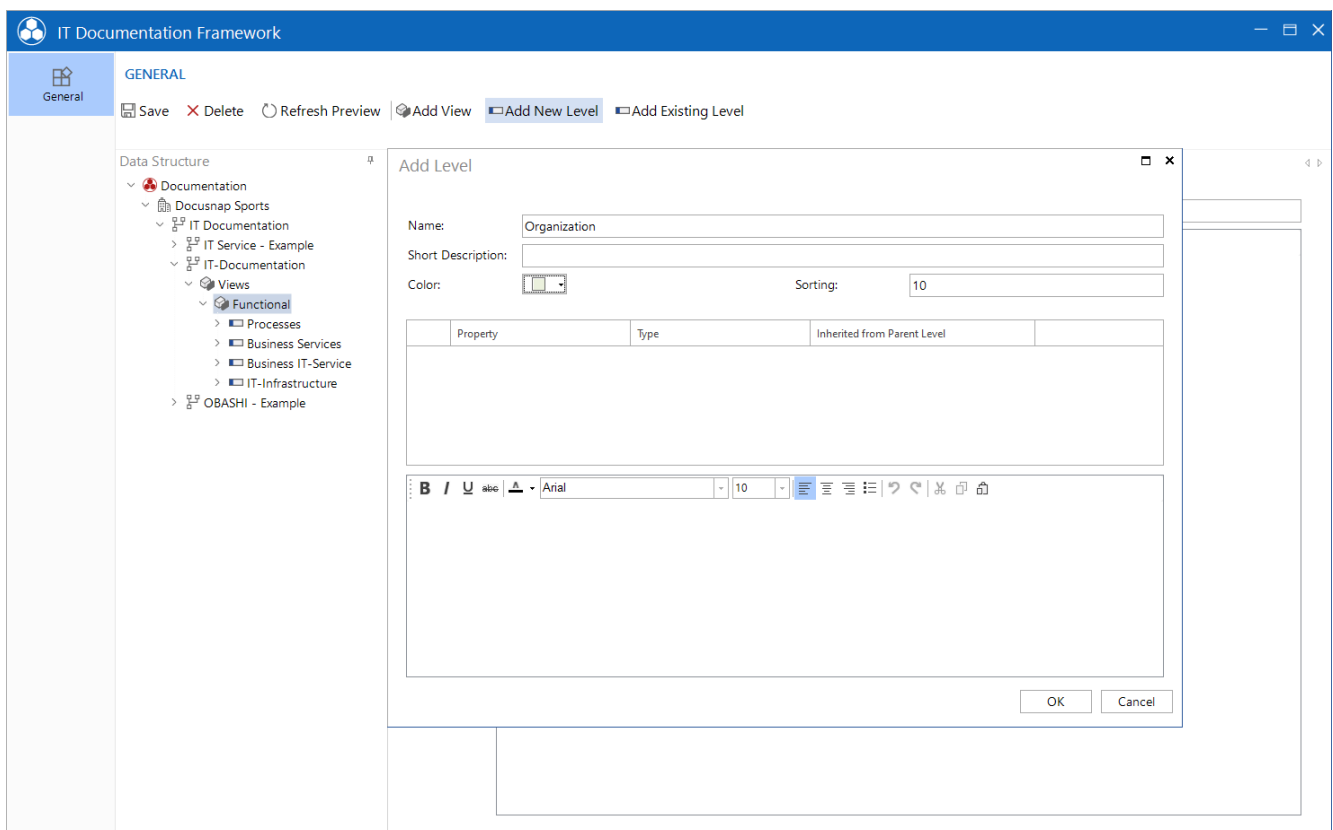


Fig. 5 - Create levels

2.3.1 Add structural elements

You can create a structural element after selecting the level in which the structural element(s) is/are to be inserted. To do this, use the button **Add Structural Element** item.

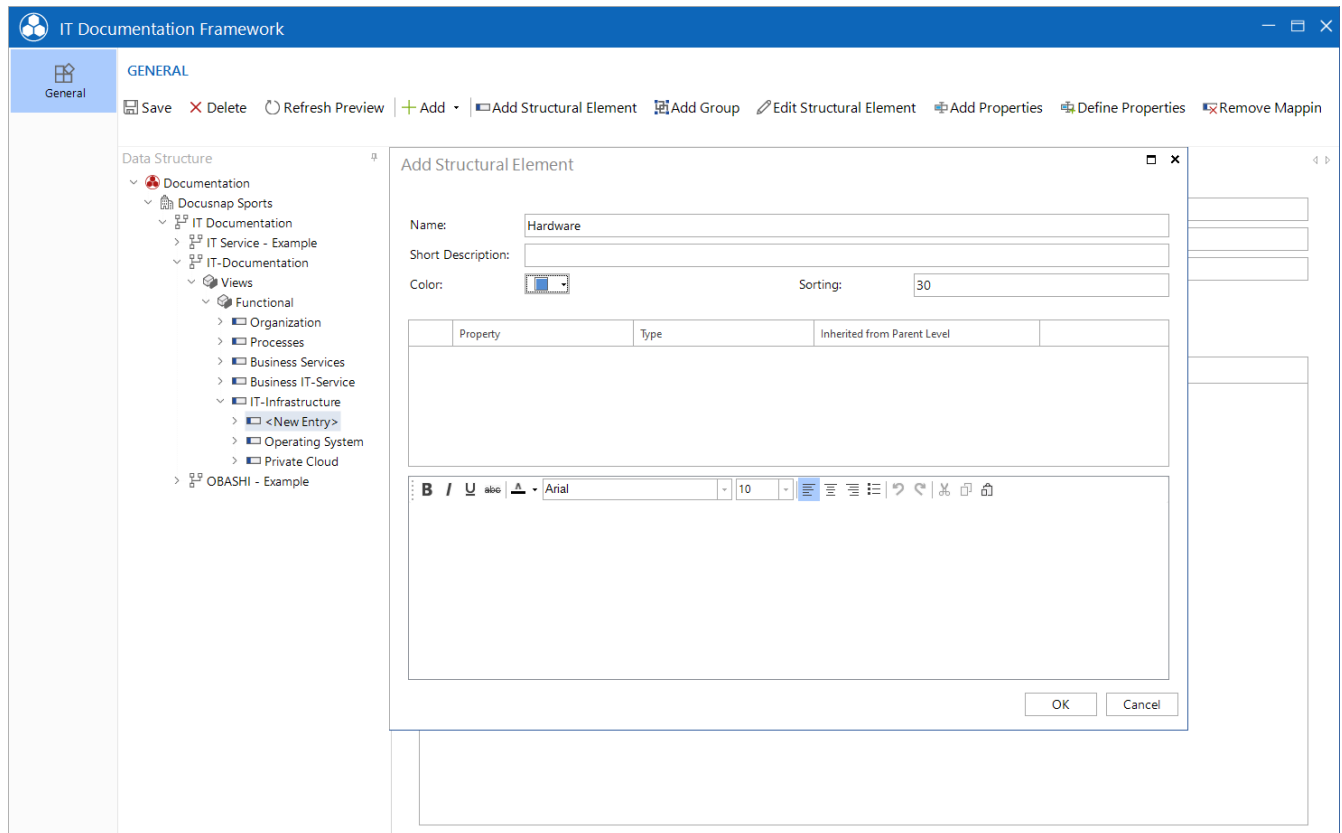


Fig. 6 - Create structural elements

2.4 Adding elements

In the next step you can add elements to the levels. Here you have the choice between the buttons **+Add** and **+Add Elements**.

If you select the **+Add Elements** button, a new window will be opened where you can access the existing information from the inventory area (servers, software, services, processes, users, etc.).

Using the **+Add** button, you can create new objects of the types Organization, Process and Service and assign them directly.

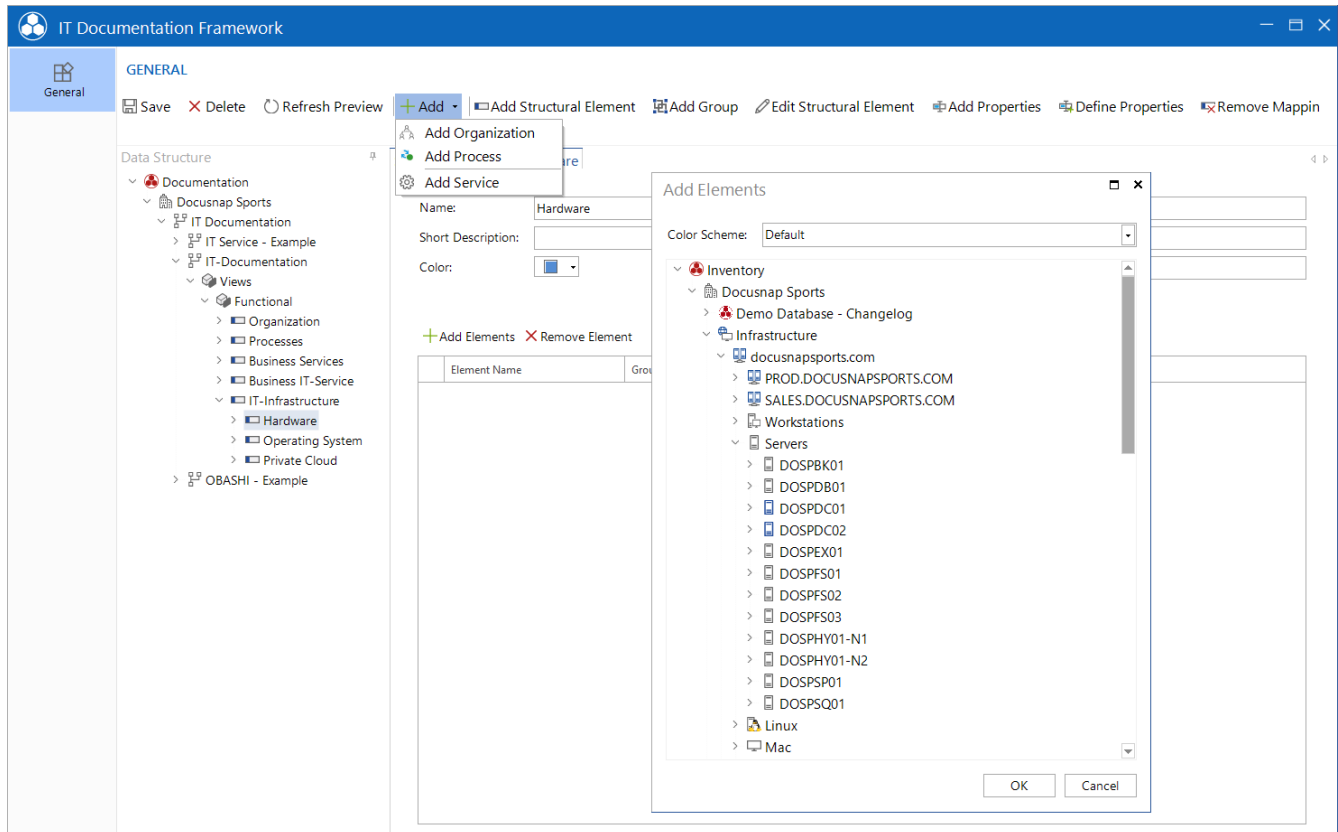


Fig. 7 - Adding elements

Create the necessary organization, processes, business services and business IT services and add them to the appropriate levels.

In the Add Items window, you can also select multiple objects and add them to the layer by holding down the control key.

2.4.1 Creating groups

Groups, which combine individual elements, can be created in levels. To do so, select the appropriate level and click the **Add Group** button – assign a name and color scheme if desired.

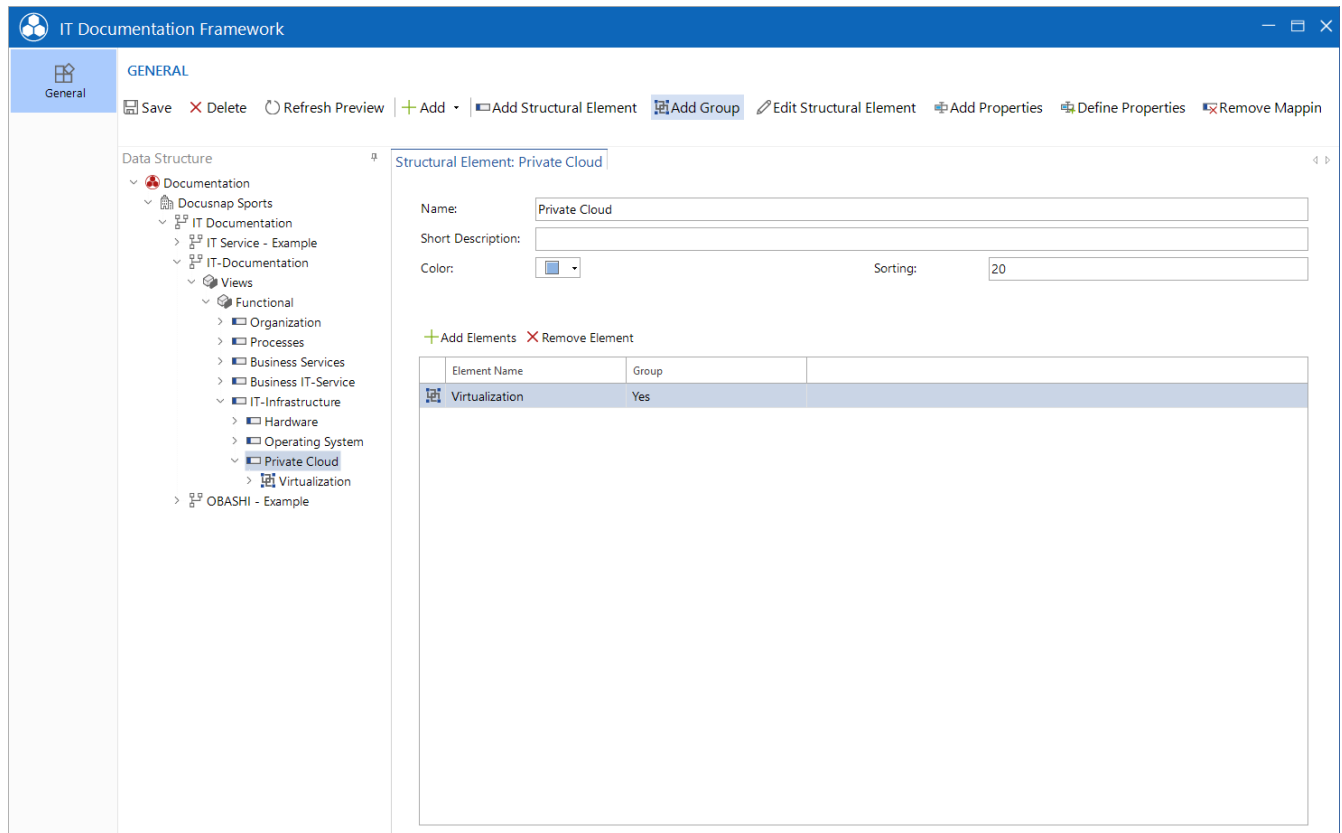
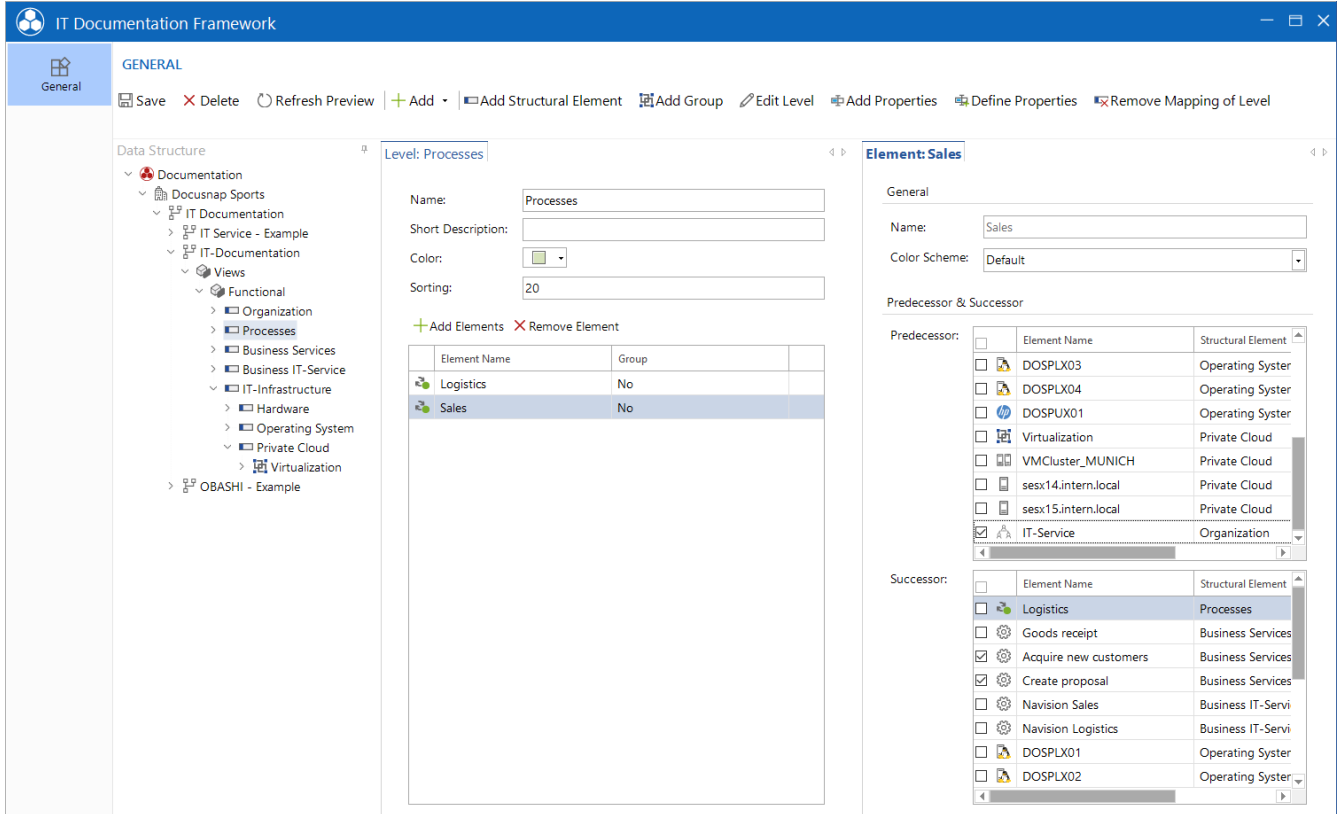


Fig. 8 - Adding groups

2.5 Linking elements

To represent dependencies, the elements still have to be linked to each other. To do this, switch to the level, select the element and choose the predecessor and/or successor. Note also that the previously created group can also be selected as predecessor or successor.



The screenshot displays the 'IT Documentation Framework' application window. The 'GENERAL' tab is active, showing a 'Data Structure' tree on the left and configuration panels for 'Level: Processes' and 'Element: Sales' on the right.

Data Structure Tree:

- Documentation
 - DocuSnap Sports
 - IT Documentation
 - IT Service - Example
 - IT-Dokumentation
 - Views
 - Functional
 - Organization
 - Processes (selected)
 - Business Services
 - Business IT-Service
 - IT-Infrastructure
 - Hardware
 - Operating System
 - Private Cloud
 - Virtualization
 - OBASHI - Example

Level: Processes Configuration:

- Name: Processes
- Short Description:
- Color: [Green]
- Sorting: 20
- Buttons: + Add Elements, - Remove Element
- Table:

| Element Name | Group |
|--------------|-------|
| Logistics | No |
| Sales | No |

Element: Sales Configuration:

- General
 - Name: Sales
 - Color Scheme: Default
- Predecessor & Successor
 - Predecessor:

| | Element Name | Structural Element |
|-------------------------------------|---------------------|--------------------|
| <input type="checkbox"/> | DOSPLX03 | Operating System |
| <input type="checkbox"/> | DOSPLX04 | Operating System |
| <input type="checkbox"/> | DOSPUX01 | Operating System |
| <input type="checkbox"/> | Virtualization | Private Cloud |
| <input type="checkbox"/> | VMCluster_MUNICH | Private Cloud |
| <input type="checkbox"/> | sesx14.intern.local | Private Cloud |
| <input type="checkbox"/> | sesx15.intern.local | Private Cloud |
| <input checked="" type="checkbox"/> | IT-Service | Organization |
 - Successor:

| | Element Name | Structural Element |
|-------------------------------------|-----------------------|--------------------|
| <input type="checkbox"/> | Logistics | Processes |
| <input type="checkbox"/> | Goods receipt | Business Services |
| <input checked="" type="checkbox"/> | Acquire new customers | Business Services |
| <input checked="" type="checkbox"/> | Create proposal | Business Services |
| <input type="checkbox"/> | Navision Sales | Business IT-Servi |
| <input type="checkbox"/> | Navision Logistics | Business IT-Servi |
| <input type="checkbox"/> | DOSPLX01 | Operating System |
| <input type="checkbox"/> | DOSPLX02 | Operating System |

Fig. 9 - Linking elements - select predecessor and successor of an element

3. Export and import framework / structure

Frameworks once created can be exported and imported into other Docusnap installations. You can also use this way to create a template that contains the relevant levels etc.

The export / import takes place outside the editor, in the main Docusnap interface. Select a framework or the IT Documentation object. Using the control surface with the three points, you can now perform the export or import

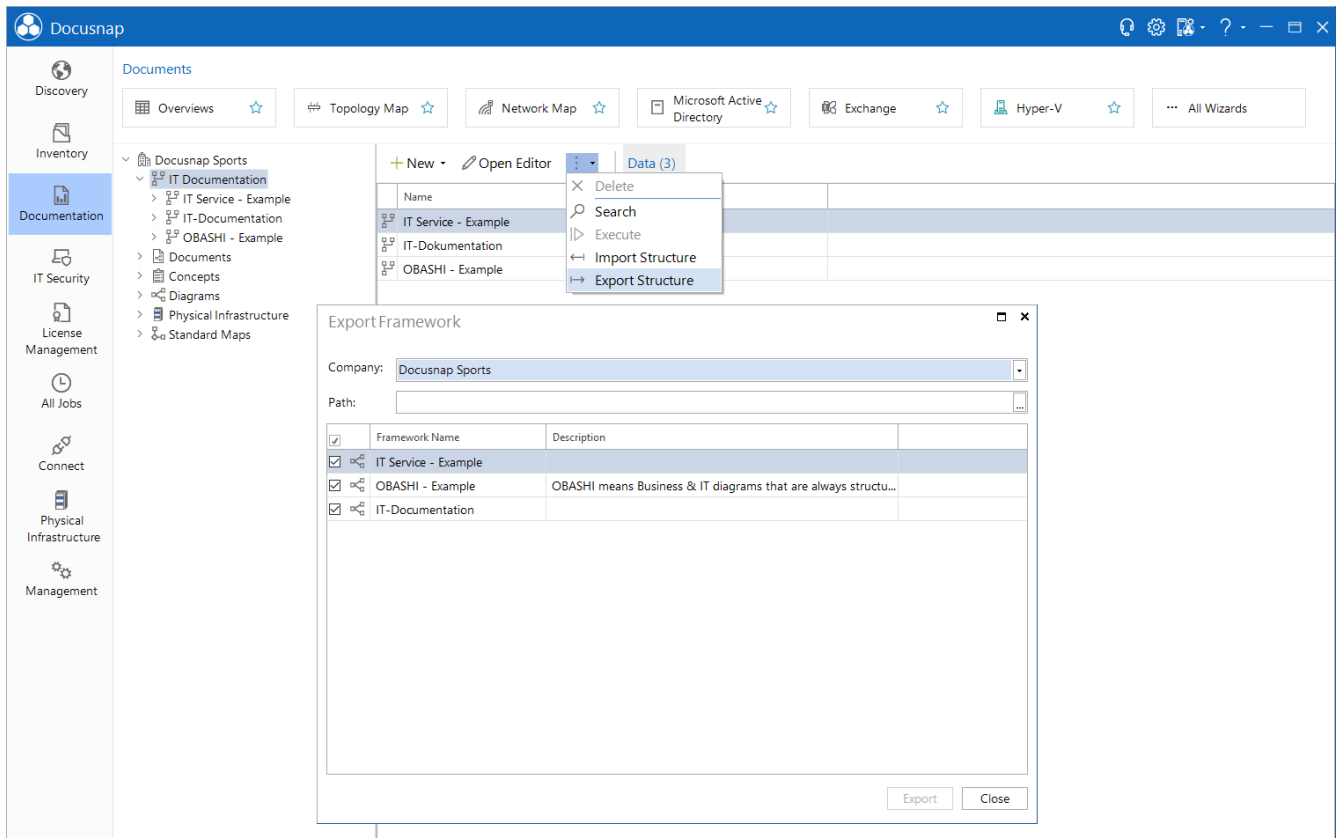


Fig. 10 - Import - Export structures

VERSION HISTORY

| Date | Description |
|------------------|--|
| October 7, 2017 | Version 1.0 – HowTo created |
| October 01, 2020 | Version 2.0 - Revision of the HowTos for Docusnap 11 |
