



YaSM[®] Process Map

User Manual for the YaSM[®] Process
Map (BIC Version)

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Installation

This document provides instructions for the use of the YaSM®¹ Process Map for BIC Process Design®² by GBTEC Software AG; for further help on BIC and the BIC Platform®, please consult the BIC user manual.

Contents of the delivery archive

The YaSM Process Map is provided as a ZIP archive, containing all product components:

- Folder “BIC_Export”: YaSM Process Map as a BIC export archive (.ZIP file, personalized for the licensee)
- Folder “Checklists”: Checklists / document templates in Microsoft Word™³ format, specifying the YaSM data objects in detail
- Folder “RACI”: RACI matrix in Excel format
- Folder “Accompanying_Documents”: User manual, Excel table of process inputs and outputs, PDF quick references such as the YaSM glossary, and process metrics
- Folder “ISO_20000_Documents”: Introduction to the YaSM - ISO 20000 Bridge and table of ISO 20000 requirements in Excel format (only available if your product license includes the “YaSM - ISO 20000 Bridge”).

¹ YaSM® is a registered trademark of IT Process Maps GbR.

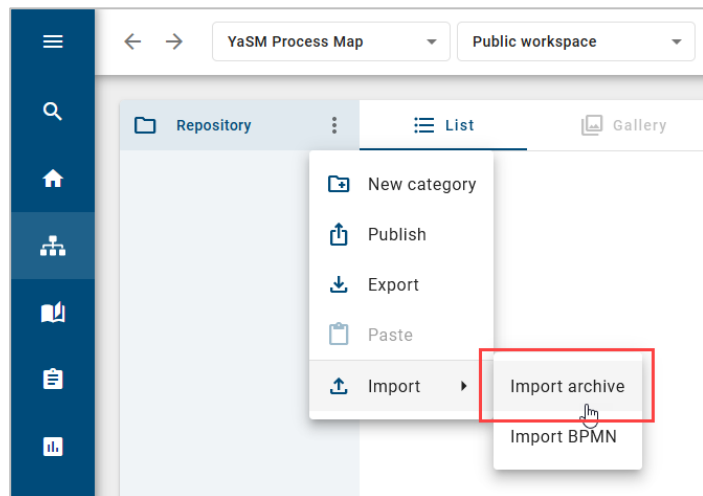
² BIC Process Design® and BIC Platform® are registered trademarks of GBTEC Software AG.

³ Microsoft®, Word™ and Excel® are registered trademarks of Microsoft Corp.

Importing the YaSM Process Map into BIC

To import the YaSM Process Map, first unzip your delivery archive. Then launch BIC Process Design and:

- Go to “Administration / Repositories” and create a new, empty repository with a name of your choice.
- Switch to “Diagrams” in the main menu and select your new repository from the drop-down list at the top.
- In the context menu of the repository, click on “Import archive”.
- In the file selection dialog box that appears, select the ZIP file from the BIC_Export folder of your delivery archive.



The import completes with a success message.

Please note: The import may take 15 minutes or more. The success message, signaling the successful completion of the import, typically appears after approx. 5 minutes, but after the initial import BIC starts to build up the catalog with all relationships. You may not see all items in the catalog until this background process has completed, and the catalog view may flicker.

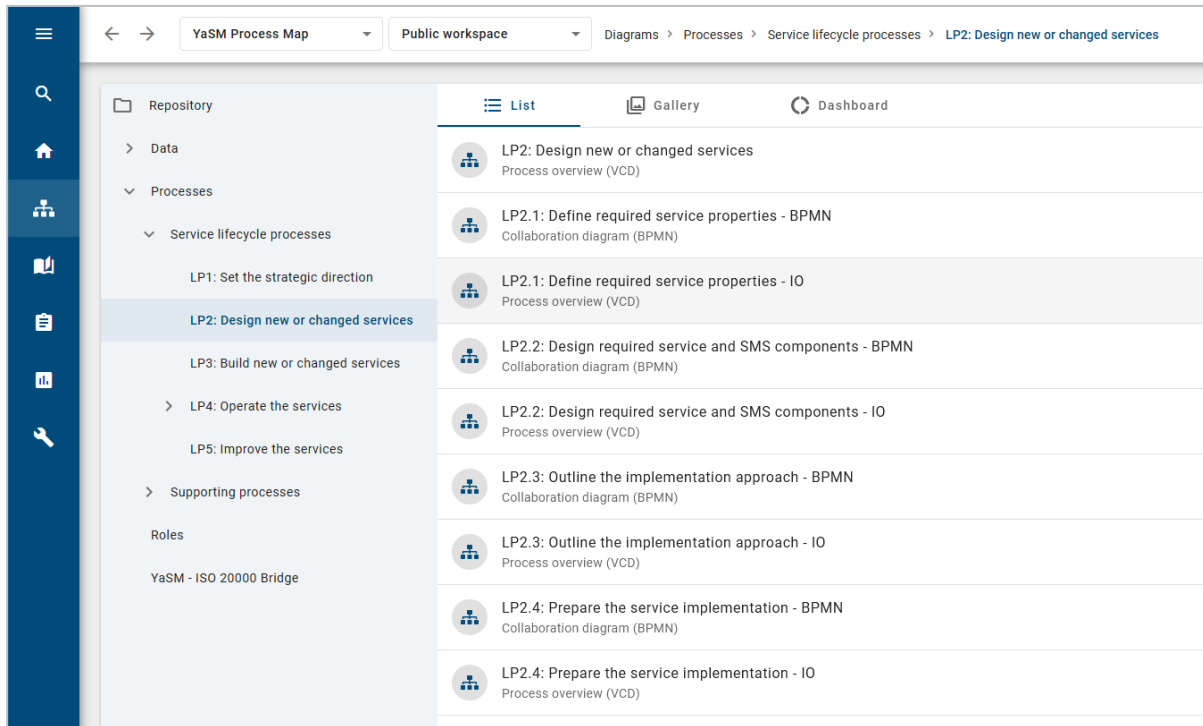
Category tree and diagrams

Once the import has completed, the categories (folders) of the YaSM® Process Map will appear in the BIC category tree, as illustrated below.

If you select a category in the category tree, the adjacent list view will show all diagrams contained in the category.

In the example below, the list view displays all diagrams for the YaSM process LP2: Design new or changed services:

- One process overview diagram
- Several BPMN and input / output diagrams for all sub-processes

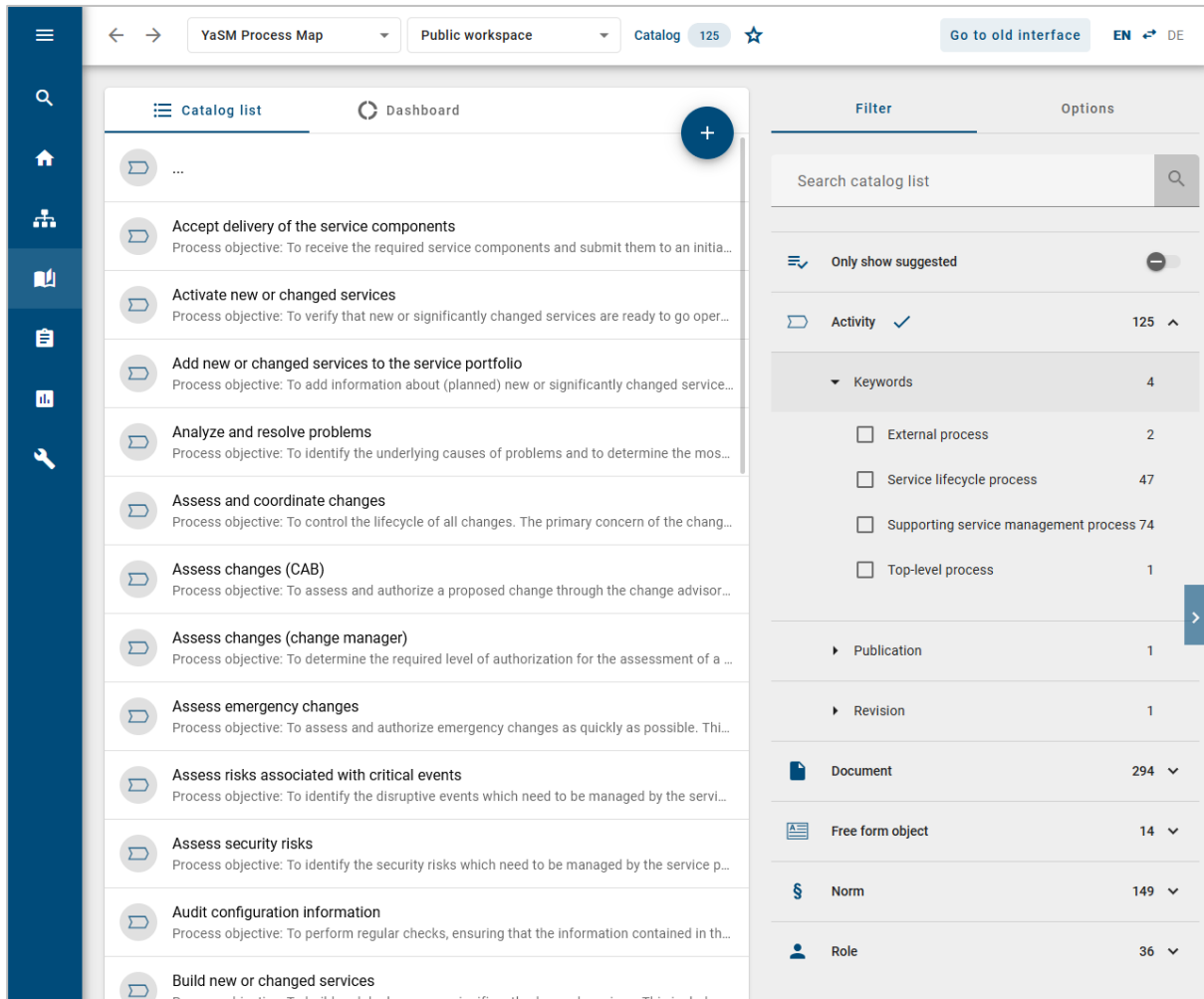


In the root of your repository, you will find the “Front page” model. This is the main entry point from where all other diagrams and content of the YaSM Process Map can be reached via links.

Catalog and catalog items

The YaSM Process Map includes catalog items (re-usable objects like activities / processes, documents, roles and norms).

These catalog items are created during the import process, and you can find them in the catalog view (see figure below).

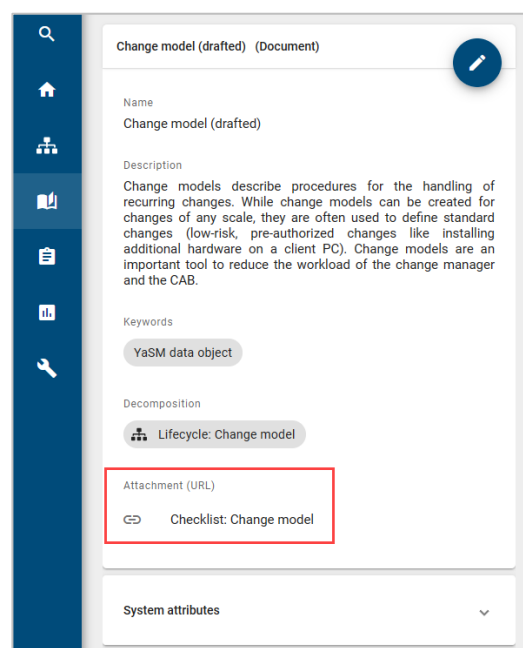


Document objects and checklists

The catalog includes items of type “Document”. These are used in various diagrams to represent process inputs and outputs.

If the document is a YaSM data object, the YaSM model provides a checklist (document template) for the object in Word format. These Word files are stored as binary objects in the BIC database, as can be seen in the “Attachment (URL)” attribute of the catalog item.

If you prefer to store these documents in a different location, such as a SharePoint document library, you can also find the original Word files of the checklists in the Checklist folder of your delivery archive. In this case you will need to adjust the URL attribute of the catalog items accordingly.

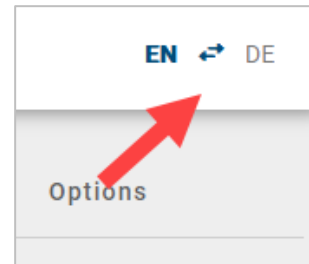


Switching between languages

The YaSM Process Map for BIC in your delivery archive contains the English and German language versions. All diagrams and catalog items are provided in these two languages, and you can easily switch between these languages.

To work with the YaSM model in your preferred content language, you can switch between languages and set the content and secondary languages at the top-right of your screen.

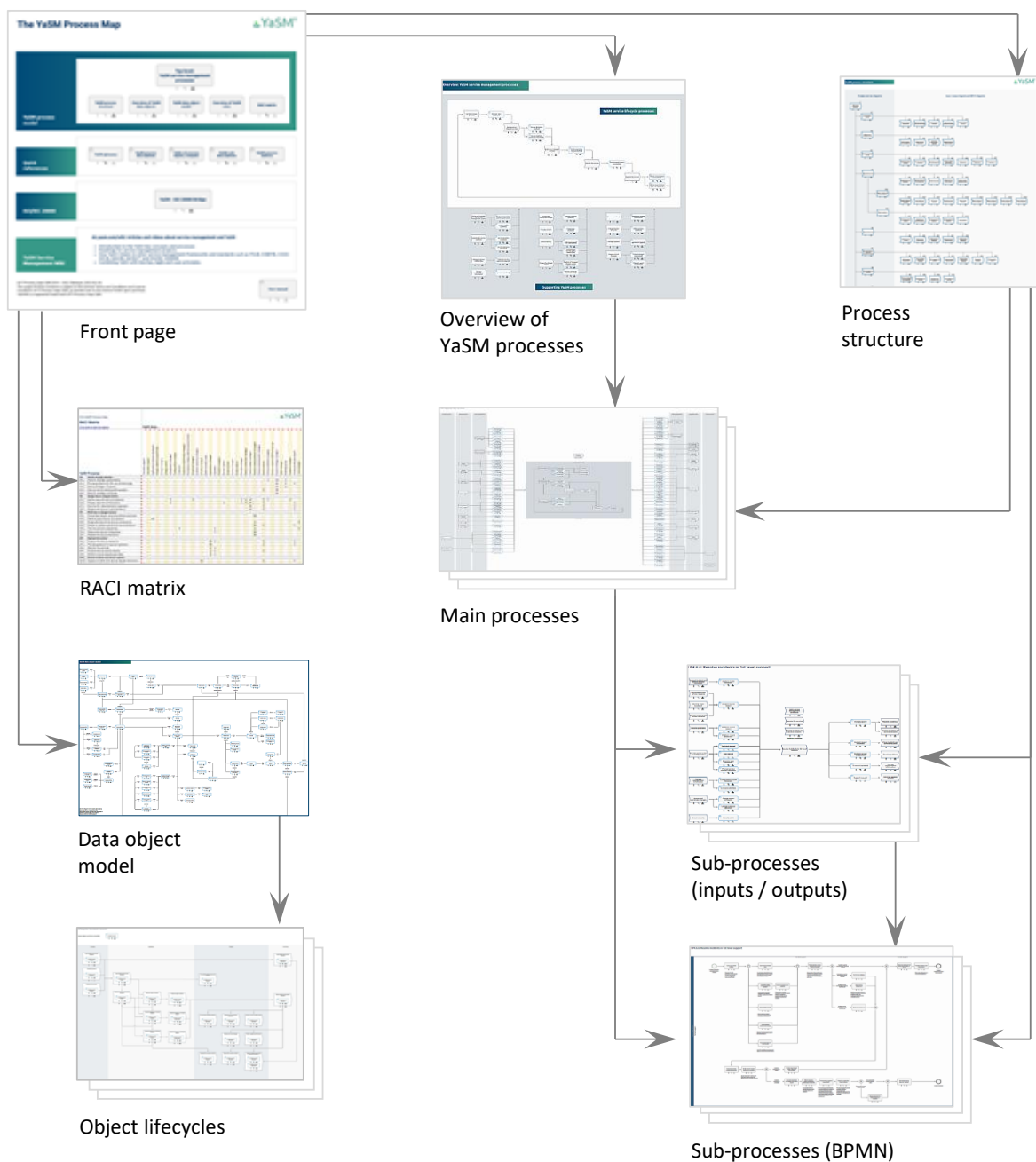
Your currently selected content language is displayed in bold. Click on the double arrow to toggle languages.



Navigating the YaSM Process Map

The “Front page” diagram in the root of the BIC explorer is the main entry-point into the YaSM Process Map. From here, you can reach the various parts of the process model via links.

The key navigation paths are illustrated below:



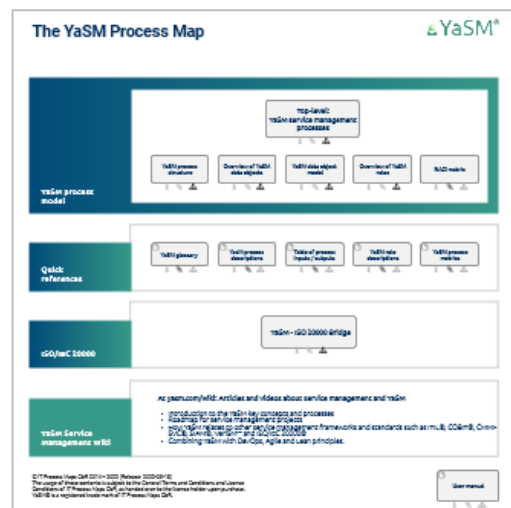
Components of the YaSM Process Map for BIC

BIC diagrams

Front page

The front page is a portal diagram with links to the various components of the YaSM Process Map. It is the main entry point into the process model.

The front page is a BIC diagram of type Process Overview (VCD).

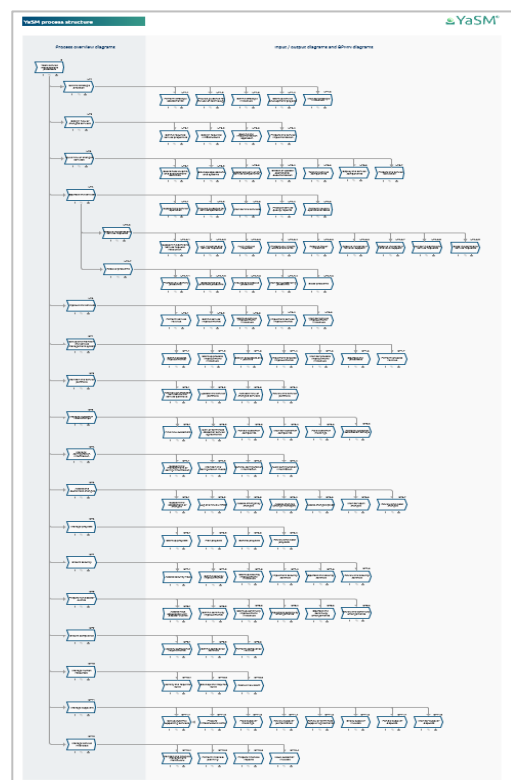


Process structure diagram

The process structure diagram provides a complete view of the YaSM process structure on a single page.

Every process symbol features a link which makes this diagram ideal for navigating directly to a specific YaSM process or sub-process.

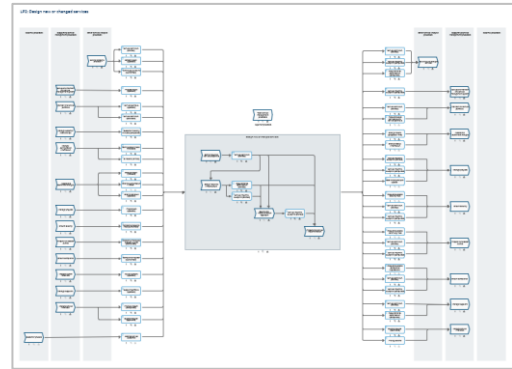
This BIC diagram is of type Process Overview (VCD).



Process overviews

Overview diagrams show for each YaSM main process how it is related to the other main processes and what sub-processes it contains.

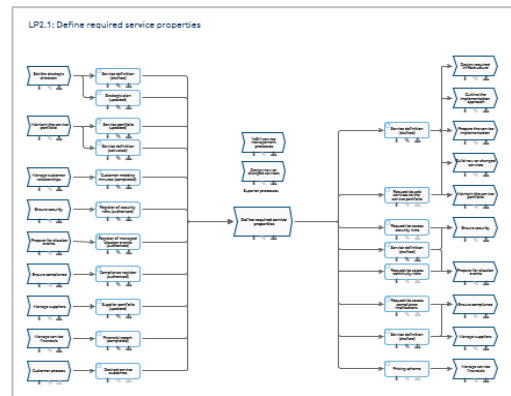
These BIC diagrams are of type Process Overview (VCD).



Process input / output diagrams

Process input / output diagrams describe the process interfaces for each YaSM sub-process.

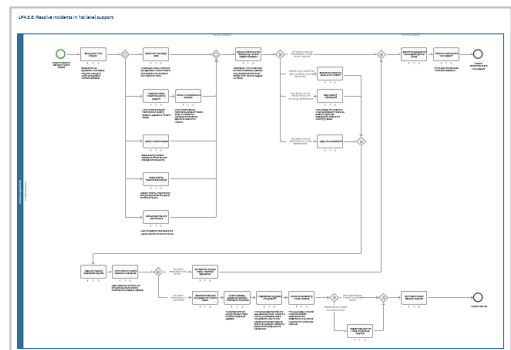
These diagrams are of type Process Overview (VCD).



BPMN flowchart diagrams

The details of each YaSM sub-process (activities, decisions and responsibilities) are described in BPMN flowchart diagrams with one or several swim lanes.

These BIC diagrams are of type Collaboration diagram (BPMN).

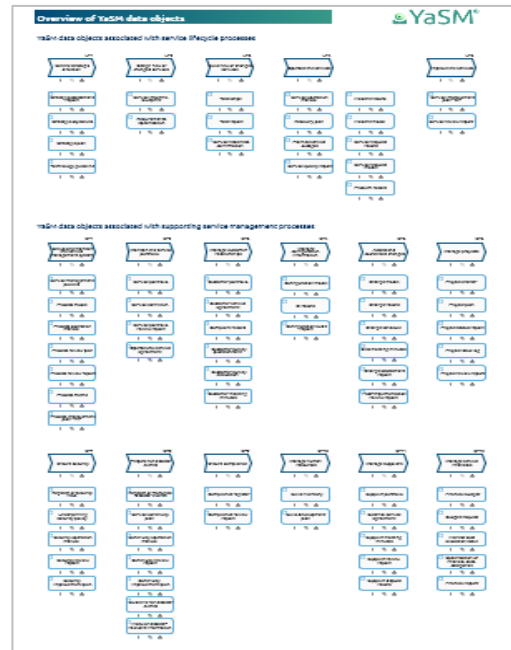


Overview of YaSM data objects

This diagram provides a list of all data objects (process inputs and outputs) used in the YaSM Process Map, sorted by the processes which are most closely associated with the objects.

Every YaSM data object has an associated checklist (document template) which describes the object in more detail, and an associated “object lifecycle” diagram.

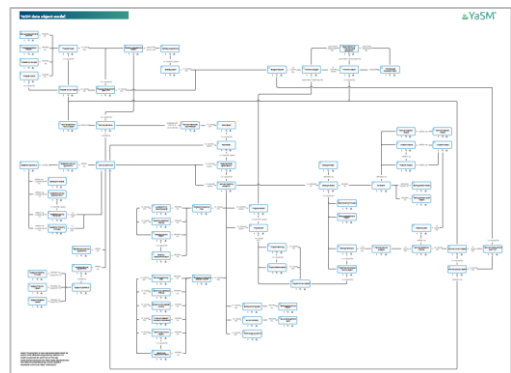
The overview of YaSM objects is a BIC diagram of type Process Overview (VCD).



YaSM data object model

The YaSM data object model provides a complete overview of the key relationships between the YaSM objects. The data model helps to understand the relevance of each YaSM data object within the YaSM framework.

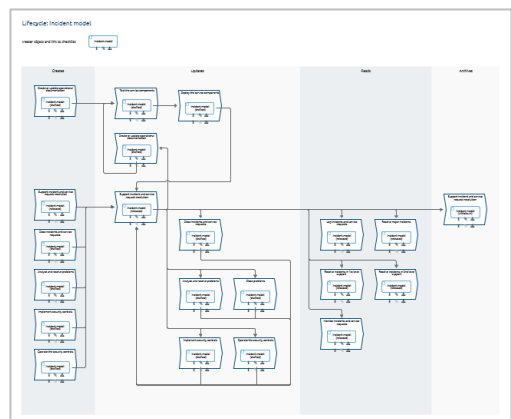
This BIC diagram is of type Structural Diagram.



Object lifecycle diagrams

Object lifecycle diagrams are available for every YaSM data object. Their aim is to show which YaSM processes create, update, read and archive particular YaSM objects, and how their status changes throughout their lifecycle.

These BIC diagrams are of type Process Overview (VCD).

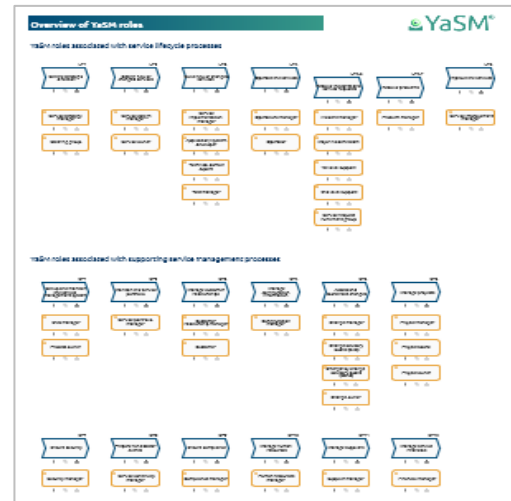


Overview of YaSM roles

This diagram provides a list of the YaSM roles and shows each role next to the process it is mostly associated with. Each role is a catalog item that can be used in other diagrams to assign responsibilities.

The overview of YaSM roles is a diagram of type Process Overview (VCD).

The YaSM Process Map also includes a RACI matrix in Excel format with all YaSM roles and their responsibilities in the YaSM processes.

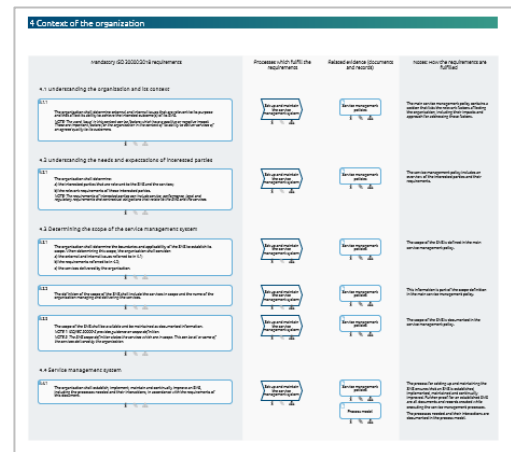


Diagrams of the YaSM® - ISO 20000 Bridge

The diagrams of the YaSM® - ISO 20000 Bridge provide a cross reference between all ISO 20000 requirements and the YaSM processes and objects.

These BIC diagrams are of type Process Overview (VCD).

Note: These diagrams are included in the YaSM BIC repository only if the customer has purchased a license for the YaSM® - ISO 20000 Bridge.



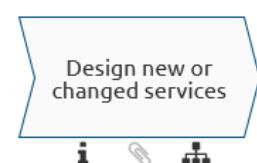
Objects and symbols used in the diagrams

BIC distinguishes between objects and symbols. For example, Activity objects represent processes and activities in the BIC diagrams. These objects can be visualized with different symbols, such as Activity, Activity (VCD) or Activity (Start) symbols.

This chapter introduces the key objects and symbols used in the various diagrams of the YaSM Process Map.

Activities

Activity objects represent processes and activities. Most diagrams that describe processes and their relationships, such as the process overviews and input/output diagrams, show processes as Activity (VCD) symbols (see figure on the right).



Processes are re-usable catalog items with several maintained attributes, such as

- the process name
- the process identifier
- a definition of the process objectives in the Description attribute
- keywords to categorize the process
- a link to a diagram with the process details in the Subprocess attribute (you can open the linked diagram with a click on the subprocess icon below the process symbol)
- a link to an input/output diagram in the Allocation model attribute.

To view the attributes, select a process symbol in a diagram and expand the sidebar at the right.

Please note: Since the process objects are catalog items, do not change their attributes in the diagrams. Instead, open the process objects in the catalog to modify their attributes.

The sidebar displays the following attributes for the process 'Resolve incidents in 1st level support':

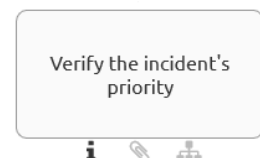
- Name:** Resolve incidents in 1st level support
- Identifier:** LP4.6.6
- Variant origin:** (empty)
- Description:** Process objective: To resolve an incident (service interruption) within the agreed time frame. The aim is the fast recovery of the service, possibly by applying a workaround. As soon as it becomes clear that 1st level support is not able to resolve the incident itself or when target times for 1st level resolution are exceeded, the incident is transferred to 2nd level support.
- Keywords:** Service lifecycle process
- Subprocess:** LP4.6.6: Resolve incidents in 1st level support - BPM...
- Variants:** (empty)
- Allocation model:** LP4.6.6: Resolve incidents in 1st level support - IO

Activities in the BPMN diagrams are shown as Activity symbols.

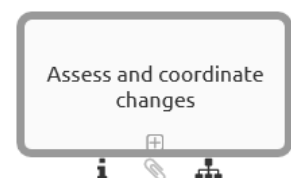
Many activities include notes below the symbol to provide further explanations. These notes are stored in the Description attribute of the activity. This attribute is then placed below the symbol.

Since activities in the BPMN diagrams typically occur only once in the YaSM processes, activities are local objects stored in the diagrams, i. e., activities are not maintained as catalog items. You can thus modify the activities directly in the diagrams.

Some BPMN diagrams contain interfaces to other processes within the flow of activities. These are shown as Activity symbols with bold borders (see figure on the right). Process interfaces are catalog items, so to change their attributes, please edit the items in the catalog.



Verify if the incident at hand is required to be treated as a major incident.



Documents

The YaSM Process Map uses Document objects and symbols to describe the information flows between the processes. We distinguish between two types of objects:

- YaSM data objects
- Other data objects

YaSM data objects

YaSM data objects represent process deliverables, i. e., documents and records created in the YaSM processes.

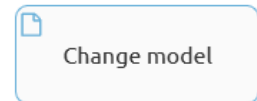
For every YaSM data object, the YaSM Process Map contains one “master object”, and one or several variants which represent specific states of the object. The states are indicated in brackets after the object name.

The purpose of using variants representing different states is easily understood when looking at the lifecycle diagram for a YaSM data object: The variants allow us to show how an object’s state changes as it is created, updated, read and archived by different YaSM processes.

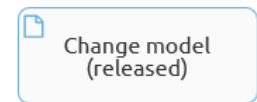
YaSM data objects are re-usable catalog items with several maintained attributes, such as

- the document name
- a brief description in the Description attribute
- keywords to categorize the document
- a link to the lifecycle diagram in the Decomposition attribute (you can open the linked diagram with a click on the decomposition icon below the document symbol)
- a link to the checklist (document template) in the Attachment (URL) attribute.

To view the attributes, select a data symbol in a diagram and expand the sidebar at the right.



Master object



Object variant representing a specific state of a YaSM data object

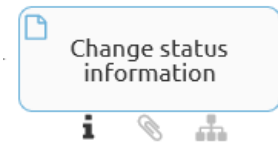
Details	Options
Name Change model (released)	
Identifier	
Variant origin	
Description Change models describe procedures for the handling of recurring changes. While change models can be created for changes of any scale, they are often used to define standard changes (low-risk, pre-authorized changes like installing additional hardware on a client PC). Change models are an important tool to reduce the workload of the change manager and the CAB.	
Keywords YaSM data object	
Decomposition Lifecycle: Change model	
Attachment (URL) Checklist: Change model	

Other data objects

Just like YaSM data objects, “other data objects” represent information flowing from one process to another. But unlike the YaSM data objects, where YaSM has strong views about their content, such objects are mostly informal data or information.

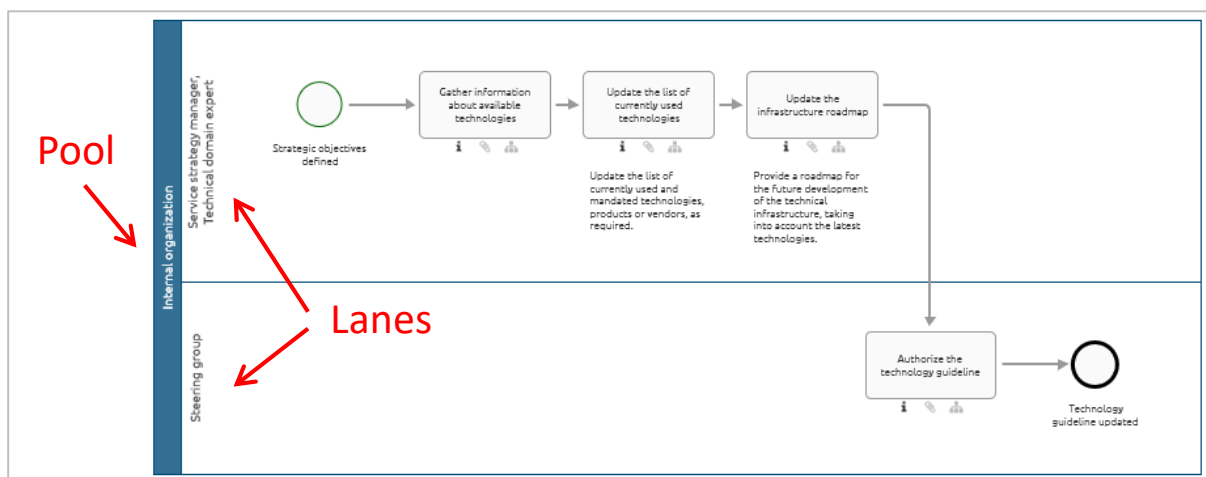
For this reason, there are no associated lifecycle diagrams or checklists.

Please note: Since documents are catalog items, do not change their attributes in the diagrams. Instead, open the document objects in the catalog to modify their attributes.



BPMN pools and lanes

Pools and (swim) lanes are used in the BPMN diagrams to describe which roles are responsible for performing the activities in a process.



Pools and lanes are BIC objects of type Role.

BPMN practitioners commonly use pools to represent organizations or units within organizations, and lanes to represent the roles that execute specific tasks.

All BPMN diagrams of the YaSM Process Map contain one pool named “Internal organization” and one or several lanes representing YaSM roles.

You are free to adapt the names of the pool and lane symbols as required. You can also add additional pools and lanes.

The RACI matrix displays responsibility relationships between the YaSM roles and the YaSM processes, using abbreviations as defined in the RACI model:

- R - Responsible: Those who do the work to complete a task. There is typically one role with a participation type of Responsible for every task in a YaSM process. It is also possible that several roles cooperate to execute a task.
- A - Accountable: Those who are ultimately accountable for the correct and thorough completion of a YaSM process, and to whom “Responsible” reports. Typically, there is exactly one process owner and therefore one Accountable relationship specified for each process.

The matrix is provided as an Excel table. It can be viewed or downloaded directly from the Front page diagram, and the original Excel file can also be found in the RACI folder of your delivery archive.

See also: Maintaining the RACI matrix on page 21.

Checklists/ document templates

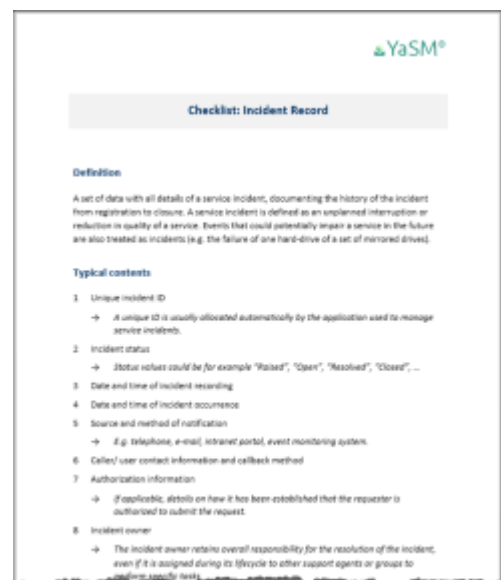
The checklists in Microsoft Word format explain the YaSM key terms in detail. Typically, a YaSM checklist exemplifies the structure of the data or information contained in a document or record.

Example: The checklist for the incident record explains what information is typically maintained for service incidents.

Checklists are available for every YaSM data object and are generic, i.e., applicable to most organizations.

Many checklists can be used as document templates. For instance, the checklist for service agreements can serve as a starting point when you need to create such agreements in your organization.

Various BIC diagrams contain checklists as attachments to Document objects. You can also find the original Word files in the Checklists folder of your delivery archive.



Quick references

“Quick references” provide overviews of the different types of objects used in the process model in printer-friendly format. These documents are included in the Front page diagram, and also as original PDF files in your delivery archive.

YaSM process descriptions

This PDF quick reference provides a list of all YaSM processes defined in the YaSM process model, complete with brief descriptions of the process objectives.

YaSM glossary

The YaSM glossary in PDF format contains definitions or short descriptions of the YaSM key terms.

Many of those terms correspond to “YaSM data objects” in the YaSM Process Map, which are used to describe the information flows between the YaSM processes. For each YaSM data object there is a checklist with more detailed information.

Process inputs/ outputs

This Excel workbook (“*process_inputs_outputs.xlsx*”) contains two tables, providing a complete list of inputs and outputs for each process. Filtering and sorting can be applied to create specific views, focusing on particular processes, inputs or outputs.

YaSM role descriptions

This PDF document contains short descriptions or definitions of all YaSM roles. Role objects are used in the YaSM Process Map to illustrate the responsibilities for whole processes or single process activities.

Process metrics

To support the selection of suitable process metrics, the YaSM Process Map contains for each process a list of widely used metrics with brief definitions in PDF format.

Working with the YaSM Process Map in BIC

You are free to modify the contents of the BIC repository provided as part of the YaSM® Process Map in any way. Diagrams and objects can be added, modified or deleted as required.

Below you will find instructions for some common tasks when customizing and using the YaSM Process Map for BIC.

Copying and moving symbols and diagrams

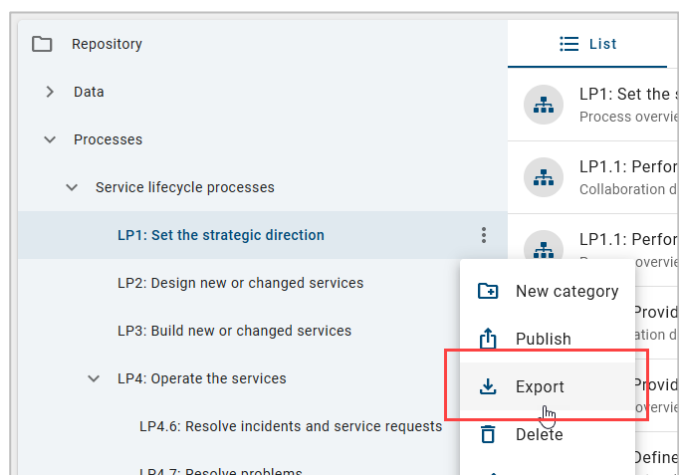
BIC allows you to copy or move symbols or a selection of symbols from one diagram to another using simple copy and paste commands.

Often, however, you may want to copy whole diagrams or categories, for example from the original repository of the YaSM Process Map to your own repositories. In this case you need to export the diagrams or categories from one repository and import the resulting ZIP archive into the other repository.

To copy a diagram or a whole category to another repository:

- Open the context menu for the diagram or category in the list of diagrams or the category tree.
- Export the diagram or category from the source repository and download the ZIP archive.
- Switch to the target repository and import the ZIP archive.

The BIC user manual provides further instructions on exporting and importing data.



Modifying and adding catalog items

The YaSM Process Map includes catalog items (re-usable objects like activities/processes, documents, roles and norms).

You can change the attributes of these items and add or delete items in the Catalog view.

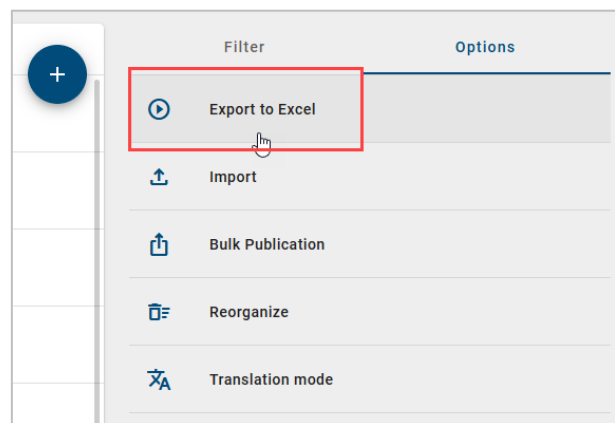
If you need to modify many items at once, for example to insert new document links, you can also download the catalog items as an Excel table.

To start the export, switch to the Catalog view and set an appropriate filter to specify which catalog items are included in the Excel table. Then click on “Export to Excel” in the Options tab.

The modified Excel table can be re-imported into the catalog. During the import, existing catalog items will be updated with the contents of the Excel table. Catalog items for which there is no information in the Excel table will remain unchanged.

Excel tables can also be useful to create whole sets of new catalog items at once.

The BIC user manual provides further details on exporting and importing catalog data.



Maintaining the RACI matrix

The matrix included in the YaSM Process Map is provided as an Excel table.

You can either maintain the RACI matrix in Excel or create similar matrices from within BIC with matrix reports. To do so, you first need to create relationships in your BIC repository between processes and roles, for example by creating a Function Allocation Diagram for each process.

The BIC user manual provides further instructions on exporting data and creating reports.

IT Process Maps GbR

Dipl.-Ing. Stefan Kempter & Dr. Andrea Kempter

Schönauer Str. 57

88131 Lindau (Bodensee)

Germany

Tel. +49 8382 2809 303

Member of itSMF

info@yasm.com

it-processmaps.com | yasm.com

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