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## Introduction to Macroscopic

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*The masculine form is used in this guide for the sake of convenience.*



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## Preface

This guide is an introduction to Macroscopic, an integrated methodology to help maximize the value of your transformation initiatives and implementation of new capabilities through information technology.

This guide answers basic questions you may have about Macroscopic, such as: What is Macroscopic, how to use it, how to obtain training or technical support, and how to adapt it.

Since the information contained in this guide is very general, when appropriate, references are made to more detailed documentation.

### *Target Audience*

You are an experienced practitioner, who will soon play an active role in a project using Macroscopic, but you are unfamiliar or only slightly familiar with Macroscopic? Then this guide is intended for you and should be read first.



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## 1. What Is Macroscopic?

Macroscopic is an integrated methodology to help maximize the value of your transformation initiatives and implementation of new capabilities through information technology.

It provides an integrated and fully customizable Business Transformation Framework of processes and best practices to help organizations:

- Ensure that Business and IT are aligned;
- Deliver maximum business value from investments in IT-enabled change initiatives;
- Improve the effectiveness of the IT function.

### **What kinds of change can Macroscopic address?**

Macroscopic processes can be used to address most kinds of IT-enabled organizational changes. They include:

- Changing the strategic direction of the organization
- Changing the structure and processes of the organization to better deliver business value
- Delivering change to the business by implementing information system solutions
- Applying changes to meet evolving business needs by maintaining implemented information systems

Macroscopic processes can also be used to address the management and governance aspects of the related change initiatives. These aspects include:

- Organizing change initiatives into comprehensive and manageable programs that ensure the realization of the expected benefits
- Providing the necessary disciplines for the effective structure and execution of change initiative projects

The Macroscopic processes are designed to be easily adapted to suit the needs of virtually any given change an organization may want to achieve.

### **Other than processes, what is included in Macroscopic?**

Macroscopic processes are supported by techniques, tools, examples, and learning components. Macroscopic also allows organizations or projects to add their own customized support material to help practitioners apply the Macroscopic processes in their particular context.

## 1.1 How is the Macroscopic Knowledge Organized?

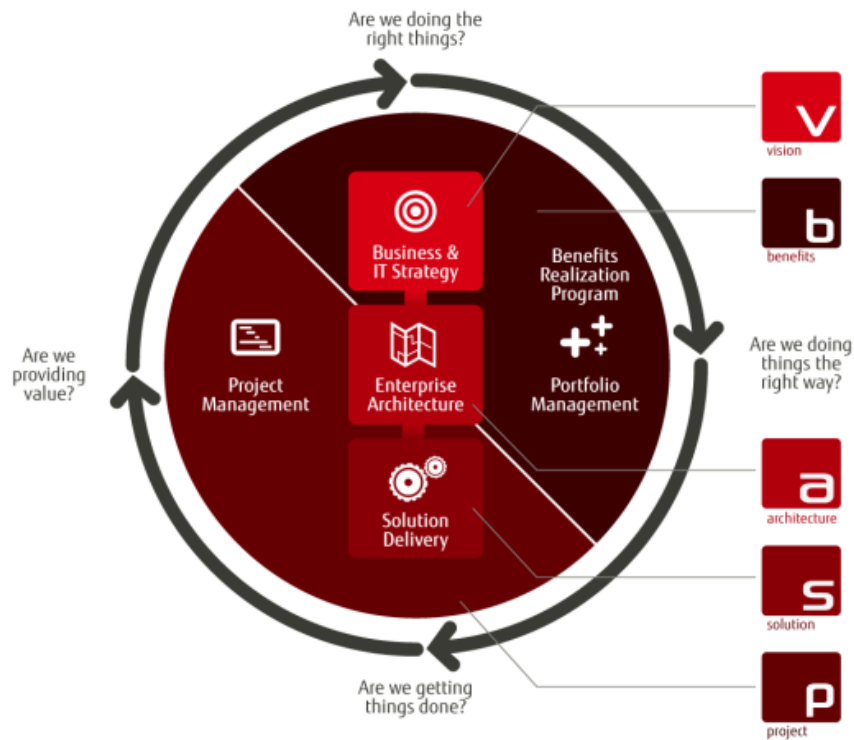
Technology-related projects often involve complex business transformation that requires management to think beyond standalone projects and rather focus on business change programs and how business value is materialized over time. Organizations must ask themselves four key questions related to their business transformation initiatives:

- Are we doing the **right things**?
- Are we doing things the **right way**?
- Are we **getting things done**?
- Are the things we are doing **providing value to the business**?

Macroscopic offers an integrated set of processes that help organizations answer these questions related to introducing change into their business and supporting information technologies to improve their business performance.

Macroscopic knowledge is organized into five distinct process domains, each with specific goal achievement methods.

The following diagram illustrates the domains: it presents their main concern and shows that they are interrelated, which helps keep a global view of the organization when undertaking change.



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**The five domains in Macroscopic**



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## **Macroscopic Domains**

### **Vision**

The Vision domain provides a structured approach to help you confirm or formalize business and IT strategy, strategic management and governance.

From a governance perspective, Vision represents a fundamental input in the Macroscopic family. Vision helps an organization answer the basic question “Are we doing the right things?”

It provides the Confirmation of Direction process to define organizational change and its direction.

### **Benefits**

The Benefits domain provides a structured approach to help the organization formulate and manage programs in order to obtain maximum business value from its investments in business improvement initiatives.

Benefits provides support for the identification, structuring, evaluation, selection, and ongoing management of the necessary and valuable “benefits realization programs” that deliver the benefits expected from the organization’s investments.

It focuses on the delivery of relevant business value and pays particular attention to the people and organizational impacts of the business change being initiated by the program(s). It also addresses the key disciplines of benefits identification, and the dynamics of benefits realization, tracking, and recovery.

It helps an organization answer the basic question “Are the things we are doing providing value to the business?”

It provides two processes: Portfolio Management and Program Management. While Program Management takes care of everything directly related to the programs (from definition to implementation), Portfolio Management governs the enterprise’s portfolio of programs based on their comparative value and makes all the investment decisions.

### **Architecture**

The Architecture domain provide a structured approach to Enterprise Architecture: delivering the capabilities required to support the organization's strategy.

It does so by identifying recommended changes to organizational capabilities (such as business processes, products and services, technology infrastructure, management controls and resources) and by configuring the changes into business solutions that enable the organization to deliver and implement these changes.

It helps an organization answer the basic question “Are we doing things the right way?”

Architecture provides the Definition of Capabilities base process to structure the change and enable the organization to deliver and implement it.

### **Solution**

The Solution provides an integrated approach to help you efficiently envision, design, assemble, deliver, operate, and evolve information system solutions of all kinds throughout their lifecycle.

It covers the delivery, operation and maintenance of information systems and addresses aspects related to work processes, technology and people, as well as software.

It offers a number of processes that can be further adapted or combined to adequately support a given project.

### **Project**

The Project domain provides a structured approach to help you efficiently manage projects of all kinds.

Its processes and procedures are based on the principles and framework proposed in the Guide to the Project Management Body of Knowledge (PMBOK<sup>®</sup>) published by the Project Management Institute (PMI).

The method also supports most of the activities specified by Level 2 and 3 Key Process Areas of the Software Engineering Institute (SEI) Capability Maturity Model Integrated (CMMI<sup>®</sup>) related to project management, and helps organizations to improve their maturity level.

## Macroscopic Processes

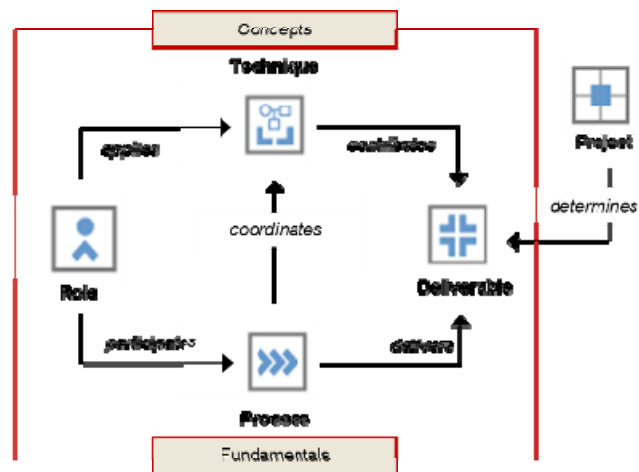
The Macroscopic processes provide a structured approach to change. Each of them addresses specific types of change and support services related to these changes, as described in the table below.

Domain	Process	Types of Change Addressed/Services Supported
Vision	Confirmation of Direction	<ul style="list-style-type: none"> <li>– Resolution of business and IT strategic issues.</li> <li>– Definition of business and IT – vision, strategic realities and targets, and course of action.</li> <li>– Integration of business and IT strategies.</li> </ul>
Benefits	Program Management	<ul style="list-style-type: none"> <li>– Enhancement of the realization of benefits associated with business and IT investments.</li> <li>– Consistent evaluation and management of the organization's investments.</li> </ul>
	Portfolio Management	<ul style="list-style-type: none"> <li>– Funding and management of the enterprise's portfolio of programs, based on business value delivered to the organization.</li> </ul>
Architecture	Definition of Capabilities	<ul style="list-style-type: none"> <li>– Design or redesign of business processes, management controls, organizational structures, business resources, products and services, and/or relationships with external agents, in order to achieve performance improvements.</li> <li>– Design and planning of the delivery of IT components in a structured manner.</li> <li>– Analysis, design, and implementation of the optimum technological infrastructure for solution delivery projects.</li> <li>– Monitoring of the evolution of the technological infrastructure in order to maximize benefits by ensuring efficiency and flexibility toward future business changes and new technology trends.</li> </ul>
Solution	Solution Lifecycle ( <i>Opportunity Evaluation</i> )	<ul style="list-style-type: none"> <li>– Determine if a proposed business improvement benefits the business and should receive closer examination.</li> <li>– Describe the business needs and provide an order of magnitude of the costs and benefits of delivering the change.</li> </ul>
	Solution Lifecycle ( <i>Base Delivery Process</i> )	<ul style="list-style-type: none"> <li>– Design and implementation of efficient and appropriate information systems in close cooperation with users, while ensuring proper transition to the new situation and knowledge transfer.</li> <li>– Selection of the right IT solutions, whether custom-built or assembled from commercial, off-the-shelf components.</li> </ul>
	Solution Lifecycle ( <i>Accelerated Delivery Process</i> )	<ul style="list-style-type: none"> <li>– Delivery of enterprise solutions under tight schedules.</li> <li>– Use of skilled, well-equipped teams in order to optimally deliver enterprise solutions.</li> </ul>
	Solution Lifecycle ( <i>Package Solution Delivery Process</i> )	<ul style="list-style-type: none"> <li>– Path useful in all projects where a package solution is preferable, and where an organization is willing to make the necessary compromises between total satisfaction of needs and the demands of cost reduction.</li> <li>– Faster implementation of a proven solution.</li> </ul>
	Solution Lifecycle ( <i>Agile Delivery Process</i> )	<ul style="list-style-type: none"> <li>– Agile approach to system development and project management emphasizes the following aspects: <ul style="list-style-type: none"> <li>– Teamwork and collaboration</li> <li>– Adaptability to changing requirements</li> <li>– Rapid and early delivery into the client's hands</li> <li>– Emphasis is put on producing software.</li> </ul> </li> </ul>
	Solution Lifecycle ( <i>System Operation</i> )	<ul style="list-style-type: none"> <li>– Monitoring of the functional and technical aspects of information systems against service level agreements (SLA) and generation of change requests when problems are detected.</li> </ul>
	Solution Lifecycle ( <i>Change Request Management</i> )	<ul style="list-style-type: none"> <li>– Handle all the change requests, urgent or not, received from various sources inside and outside the enterprise. They are validated, logged, assessed and submitted for approval.</li> </ul>

Domain	Process	Types of Change Addressed/Services Supported
	Solution Lifecycle ( <i>System Maintenance</i> )	– Design and implementation of functional and technical changes to re-align information systems with business requirements and performance criteria.
Project	Project Management	– Integration of executive business sponsor and user representative(s) into project organization to ensure delivery of a sound business solution. – Delivered solutions on time, within budget, and to specifications.

## Macroscopic Phases or Process Groups

From a structure perspective, Macroscopic can be viewed as a collection of Deliverables (Work Products), Roles, Techniques, Fundamentals and Concepts orchestrated by a defined Process.



The Macroscopic processes are made up of a number of phases or process groups that deliver particular services (e.g., evaluate the opportunity to deliver a new information system).

These phases or process groups are composed of activities, which produce deliverables. Deliverables are tangible work products, such as user guides, models, and computer programs, which are used to provide the phase or process group's intended service. The deliverables make decisions visible and explicit and thus facilitate the accomplishment and the management of the required change.

When applicable, phase or process group activities coordinate the application of techniques and combine the information generated from using these techniques into the target deliverables.

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## 2. How Do I Use Macroscopic?

There are many ways you can use Macroscopic and these include:

- The online version, which enables you to access the Macroscopic repository content, display or download tools, download or access learning components and other support material such as templates and examples; finally, it enables you to add support material and even customize some of the Web pages.
- The local Macroscopic tools to generate customized deliverable templates or to adapt project plans.
- The paper-based supplemental documentation.

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### 2.1 Online Version

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#### How Do I Get Started?

##### Prerequisites

Macroscopic must be installed on computers equipped with Microsoft Windows XP SP2, Windows Vista, Windows 7, or Windows 2003 Server (or higher), and having a Web browser being either Microsoft Internet Explorer version 7.0 (or higher), Google Chrome version 1.0x (or higher), or Mozilla Firefox version 2.0.x (or higher).

Macroscopic can be used in a standalone or network mode, and is available in the following choice of languages: English only, French only, or bilingual (allows switching from a language to the other in every web page).

For more details on technical requirements, refer to the Macroscopic Installation Guide.

##### The Macroscopic Home Page

To access the Macroscopic home page:

- Use your Web browser with the following URL:  
`http://server ID/DMRHomeEn/html/En_Home.html`
  - For a network, “*server ID*” represents the name of the server on which Macroscopic is installed.
  - In standalone, “*server ID*” is 127.0.0.1.

The Macroscopic home page will be displayed.



This page gives you access to the main Macroscopic components. The default page contains:

- A header common to all Macroscopic pages;
- Links to additional information pertaining to Macroscopic;
- Links to the Macroscopic domains and processes, where the main information resides;
- Links to various topics on the use and administration of Macroscopic;

Note that you may customize this page for your organization's needs.

## How Do I Get Help?

The online version of Macroscopic provides hyperlinks that make it intuitive and easy to navigate and obtain the information you require. You can click on Getting Started on the left-hand side of the home page or from the Support menu on the sub-site header. Similarly, take a look at the Overview page.

If you need a little help, the Macroscopic Help feature is always there to assist you, no matter where you are on the site. You just have to click on Help on the Macroscopic header (see picture above) to display a list of topics, each of them offering hyperlinks to an explicatory content.

The Search function, which is also available via the Macroscopic header, can help you find sought after information. Guidelines for using this powerful facility are described in the Macroscopic Help, under the Performing a Search topic.

## 2.2 Paper-based Documentation

In addition to the online version, you can obtain information pertaining to Macroscopic through paper-based series of documents.

These documents are PDF, Word, Excel and PowerPoint files that can be obtained through the Macroscopic online version. You can get a list of these documents and

access them by using the Support Material Global View available from the Advanced Search.

Furthermore, a printable version of each Web page (except for Macroscope and domain home pages) can be obtained by using the Print button:



located in the upper right-hand corner.

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### 3. How Do I Start a Project with Macroscope?

During the start-up of any project, the first thing to do is to determine the characteristics of the situation requiring a change. Then, based on this information, one can make a decision on the type of change to be carried out.

For example, in a situation where an information system in use no longer fulfills the business objectives of the enterprise, one has first to determine (roughly) to what degree the system is now obsolete and what aspects can be improved or changed in order to keep pace with the business evolution. Based on these findings, one can make a decision to either enhance the system or redesign it. While examining the situation, one may also confirm that the technological infrastructure of the enterprise needs to be modernized in order to satisfy the requirements of the system's new functions.

Once a decision on the type of change to be achieved has been taken, the process or the processes, entirely or in part, that best correspond to the desired change, are selected within Macroscope. For example, let us suppose it has been decided to redesign the system and to enhance the enterprise's technological infrastructure. In this case, three processes prove useful:

- The Definition of Capabilities process for the enhancement of the technological infrastructure.
- The Base Solution Delivery process, for a start.
- The Project Management process.

In the above example, finding a solution to a problem requires the use of elements from three processes. However, some projects display a single major characteristic, such as redesigning business processes, or enhancing an existing information system. Such projects may use elements from a single Macroscope process.

#### Note

For reading convenience, the following text refers to the selection of one process. However, keep in mind that in many situations more than one process will be required to successfully deliver the desired change. For example, the Project Management or the Program Management processes may be used along with one or more other processes.

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#### 3.1 Planning a Project

Once the appropriate Macroscope process has been chosen, a project statement is developed. The project statement is a key deliverable, as it guides both project execution and project control.

Depending on the context, the project statement may be more or less detailed. For example, in a project for which a senior practitioner uses the Program Management process to help higher management develop competitive business



strategies, the project statement is probably less detailed. However, for the management of a large system delivery project, the project statement is quite more detailed and the solution delivery base process of Solution is then used.

### **Where Do I Get More Information?**

MacroScope provides information on project planning and even allows you to download a project statement template. For more details, refer to the Process topic of the home page of Project.

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## **3.2 Producing the Work Breakdown Structure**

Irrespective of the size of the project plan, a work breakdown structure (WBS) should always indicate, among other essential information, which deliverables are to be produced within the project and the individual who is responsible for producing them.

An important task when producing the work breakdown structure is to examine the documentation structure associated with the chosen process and choose the deliverables to be considered.

Since no two projects are identical, the deliverables pertaining to a process may not be required for all projects. Customization of the documentation structure based on project requirements and context proves necessary. A customized list of deliverables to produce is then documented in the Documentation Structure section of the Work Breakdown Structure deliverable. The list contains essentially the following information:

- The deliverable identification and the number of instances required.
- For each deliverable:
  - The coverage: should it cover every instance of a given component or just a representative subset?
  - The level of detail: do we need an outline sufficient for estimation purposes or do we need every detail available?
  - The tool used to create, display, or publish the required information.

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### **The Project Documentation Structure**

The deliverables listed in the project documentation structure are usually classified by deliverable group and physically organized into a hierarchical structure. This physical arrangement of the deliverables constitutes the project documentation framework.

The Deliverable Assistant, a MacroScope tool, provides an effective way for organizing such a structure. The solution architect or the project manager generally performs this task.

Once the initial project documentation structure has been created, the deliverable templates are usually generated and adapted according to the project needs or organizational standards. Customizing the standard title page to include the organization name and the project information is a classic example of such an adaptation.

The resulting templates are then made available to the project team members, typically through an Enterprise Content Management toolset or simply through Windows type folder structure. This favors productivity and ensures compliance with the project standards relating to deliverables.

### **Where Do I Get More Information?**

The Deliverable Assistant tool offers contextual help. For more details, click on the Tools item of the Support menu of Macroscopic. If this item does not appear on the Macroscopic menu, contact the person responsible of the installation Macroscopic in your organization.

A printable version of the Deliverable Assistant User's Guide is also available.

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## **3.3 Building a Deliverable**

Producing a deliverable usually involves the following steps in the project context:

- 1) Most importantly, understand the context of the project, the outcome expected, the types of questions that need answers, the level of formality required, etc. Then, and only then, can you determine if the deliverable at hand is required, to what level of detail, etc.
- 2) Find out the purpose and what is expected by reading the definition of the deliverable. This information is usually already present within the deliverable template in the form of suggested content.
- 3) Determine the expected coverage and level of detail for the deliverable. The project documentation plan would usually provide this information. If not, refer to the description of the activity producing the deliverable and associated guidelines.
- 4) Gather the necessary input. This may include any other deliverables required to produce the current deliverable. The process guidelines and activity description are a rich source of contextual information. It is important to know which deliverables are developed concurrently because they might influence each other.
- 5) Produce the deliverable using one or more techniques if necessary. The deliverable definition provides links to applicable techniques.
- 6) Have the deliverable validated and, if applicable, approved, according to the procedures defined for the project.

These steps are often iterative and may overlap. As well, the content of a deliverable usually evolves as the process activities are performed.

### **Where Do I Get More Information?**

All the information about deliverables, such as how to display the deliverable definition, how to see the techniques that can be used to produce the deliverable,

how to download examples and templates, how to obtain a list of the activities that contribute to producing the deliverable, can be found in the Build a Deliverable section of the Getting Started page. As well, the powerful Search facility can be used.

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## 4. How Do I Get Training?

Fujitsu offers wide variety of training related to Macroscope, in the form of instructor-led courses and computer-based training (CBTs) or web-based training (WBTs) courses.

### **Where Do I Get More Information?**

#### **On the Web**

All e-Learning modules are available on the Macroscope User Group Site site at: <http://macroscope.ca.fujitsu.com>.

#### **On Paper**

Consult the training catalogue for a complete description of all learning events (intended audience, prerequisites, target competencies, duration, outline and pedagogical approach and characteristics). To obtain more information or to set up a training event, contact the person responsible for training in your organization or your local Fujitsu representative.

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## 5. How Do I Get Support?

When you have questions or problems about using Macroscopic, first verify if support is provided within your organization. If so, you should address your request to the people responsible. If no support is available within your organization, as a registered user you can contact the Macroscopic Support Centre.

Be prepared to give or send the following information:

- Your name, organization name and license number
- The Macroscopic version (Macroscopic home page footer)
- The Macroscopic component name
- The operating system you are using and its version, service pack and language (e.g., Microsoft Windows 7 SP1 English)
- The exact wording of any messages that appeared on your screen
- A description of what you were doing when the problem arose

If you need support in the use of Macroscopic or if you want to make suggestions, as a registered user, submit a Support Request form from the Contacts page (accessible from the Macroscopic header) or use any of the following means of communication:

### **E-mail**

macroscopic.support@ca.fujitsu.com

### **Voice Mail**

Call: +1 (514) 877-3468

Toll free: +1 888 877-3468 (North America only)

### **Mail**

Macroscopic Support Centre  
Fujitsu  
1000 Sherbrooke Street West  
Suite 1400  
Montreal, QC H3A 3R2  
Canada

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## 6. Is it Possible to Adapt Macroscopic?

Fujitsu offers a fully customizable version of Macroscopic with an optional tool called Macroscopic® ProcessUnifier™. This tool is not included in the standard version of Macroscopic.

Even without this tool, it is possible to adapt the following components of Macroscopic. For example:

- The pre-generated deliverables: to replace the Macroscopic logo with the organization's logo and to modify the suggested content. Note that the Deliverable Assistant must be installed to do so.
- The Home page: to include company specific information (such as name and logo), to indicate project-related information, to use company standards and styles.
- The FAQs page: to include company or project related information such as environmental settings, procedures for technical interventions, descriptions of options and preferences.
- The Contacts page: to identify, within the company, the individual to contact for support (other than the Macroscopic Support Centre), and to include information on the closest Fujitsu office.

### **Important Note on Customization**

Unless you use the Macroscopic® ProcessUnifier™, if you reinstall Macroscopic, you will lose your customized information. It is strongly recommended to have a backup of your customized material before proceeding with reinstallation.

### **Where Do I Get More Information?**

Detailed instructions on how to adapt the Macroscopic components may be obtained from the Macroscopic Installation Guide. When further adaptation is needed, Macroscopic® ProcessUnifier™ is the ideal companion tool for customizing or integrating new processes into Macroscopic framework. You can also contact your internal Macroscopic support team for a list of other contacts.

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## 7. Is it Possible to Add and Manage Customized Support Material?

Macroscopic allows organizations to incorporate their own customized support material to help practitioners apply the Macroscopic processes in their particular context.

This is done through the online Support Material function, by inserting additional information in the Macroscopic Web pages. This information is displayed in the Support Material view of the page to which it is attached and is visible to anyone accessing the page.

A support material component may be a simple note, a link to a Web page, or a link to an external document. To facilitate retrieval, the support material items are usually categorized according to their field of expertise (e.g., a specific technology) and type (e.g., FAQ).

In a multi-user environment, only authorized users are allowed to create, modify, move, or delete the support material. In a standalone environment, any person who navigates on a local copy of Macroscopic can create and manage his own support material.

It is possible to distribute support material from one Macroscopic Web site to another, so that the knowledge can be shared with other users.

### **Where Do I Get More Information?**

Detailed instructions on how to create, manage, and distribute support material may be obtained in the Support Material topic of the Macroscopic Help.

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## **8. What's New in this Macroscope Release?**

To find out what is new in this Macroscope release, as compared to previous version, click [What's New?](#) on the Macroscope home page.



