Accelerating MBSE Impacts Across the Enterprise: Model-Based S*Patterns

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Abstract. Model-Based Systems Engineering (MBSE) methods can directly address "organizational silos" problems. This paper reports on work by the INCOSE/OMG MBSE Initiative Patterns Challenge Team. This group focuses on Pattern-Based Systems Engineering (PBSE) using model-based system patterns based on the S*Metamodel, reported in multiple IS2015 papers.

Distinctive are (1) the configurable, model-based nature of the patterns (not all historical patterns work has been model-based), (2) the technical scope of the models, encompassing requirements, design, failure mode, verification, and other aspects, (3) the system scope of the models, encompassing whole systems, configurable product lines, and platforms, not just libraries of components, (4) the diverse and integrating cross-enterprise domains of the patterns, encompassing products, innovation processes, manufacturing, packaging/distribution, and other domains, and (5) the ability to enable a variety of COTS modeling languages and tools, PLM, and other enterprise information systems to integrate support of management and application of S*Patterns across enterprises.

Introduction

Business Challenges and Opportunities

Enterprise-level economic and competitive pressures, along with human nature, can drive managers within product manufacturing or other complex enterprises into increasingly defensive postures and responses. These may locally defend their departmental functions, but globally sub-optimize the performance of the enterprise—risking the viability of the organization and the well-being of all within it. Major departments (Research, Development, Engineering, Marketing, Finance, Accounting, Production, etc.) are struggling to maintain performance, cost, quality, and schedule standards set by others, with shrinking budgets for capital, R&D, and overhead budgets. Information Technology is simultaneously a cost center, a key enabler, and a major gating factor for organizational performance. Human resources departments may find they are only able to manage compliance and crises, but not be responsive to requests for proactive resource planning and development.

Competitive pressures of markets for products and services, as well as investor market forces, are driving the need to shorten innovation cycle time from concept to production, accompanied by demand to deliver products with increased feature sets at reduced purchase and operational costs. Cars are expected to be safer, reduce driver load, be more comfortable, and contain sophisticated electronics, all at reduced fuel consumption and maintenance cost. Cell phones are expected to have greater storage and display capacity, digital connectivity, and voice quality with significantly extended battery life. Consumable goods must concurrently be effective and meet increasingly complicated set of safety and environmental regulation.

These challenges are not limited to the introductory cycle of innovations, but can also be found throughout the subsequent life cycles of the new or innovated systems. Also common across all of these examples are a backdrop of growing complexity and the constant drumbeat of cheaper, cheaper, and cheaper.

Companies, managers, and industries that deal with these pressures well not only survive but thrive. Part of the art and science of this success is concerned with addressing "enterprise level" coordination that must occur across different functional areas to achieve an emergent result for customers, shareholders, and other stakeholders. While teamwork and culture are essential ingredients of that success, the fundamental nature of cross-organizational interactions is itself a growing systems challenge that cannot be entirely overcome with culture and good will, as expectations, complexity, and speed continue to increase.

A variety of tools and methods have been brought to this party, and their success is observed and studied as best practices are codified and spread virally crossing industry and functional boundaries. Enterprise information systems, first invented to solve complex scheduling problems in manufacturing (e.g., MRP, ERP, etc.), are now being extended and used to manage financial and human resources. Lean and Six Sigma Tools have been adapted to every functional silo. Collaborative information technology and social media access have outstripped their ability for governance. With that said, in our respective client practices we find that the spreadsheet is frequently still considered (based on behavior we observe, across citizen service, defense, aerospace, automotive, health care, advanced manufacturing, energy, telecom) as the most useful information systems and legacy data management tool, while simultaneously symbolic of our clients' biggest challenges.

Project Management, Capability Maturity, and Risk Management in the late 1980s were thought by some to be so burdensome that defense systems engineers conversant in these techniques were relatively unemployable in the commercial sector. Today PMI, CMMI, and Risk Management are common valued skill sets for project managers in home construction, hospitality, education, and consumer products. Systems engineering methods and tools formerly reserved for society's most ambitious undertaking are finding their way into use to serve multi-domain issues across Products, Manufacturing Processes, Supply Chain and Distribution Systems. While credit for some of this evolution ought to be given to the improved maturity and accessibility of those methods and tools, it is fair to say that it is also being driven by growing complexity in these formerly "simpler" domains—whether the methods and tools are fully ready yet or not.

This paper exemplifies the shift of emphasis from phenotype to genotype, from atoms to bits, from making things to printing things, from bricks and mortar to intellectual property, and from expertise of the individual to shared knowledge across the team. The competitive game is moving to the Model Based Economy. What better toolkit could we ask for than MBSE? How can we harness its promise across the Enterprise? Where is additional progress needed?

Background on MBSE/PBSE and the S*Metamodel

The Patterns Challenge Team of the INCOSE/OMG MBSE Initiative (Patterns Team 2013-14) was formed in 2013 to pursue the practical use and awareness of system patterns of a particular type, called S*Patterns, which are described as follows:

1. <u>S*Models</u> are MBSE models that are based on the <u>S*Metamodel</u>. (The Metamodel provides an underlying framework that defines the semantic meaning of models conforming to it.) The S*Metamodel's explicit semantics include some key system concepts that are long-established in science and engineering, but not always found to be so explicit in contemporary models (Schindel, 2005, 2011, 2013). Figure 1 is a summary extract of some of the most important aspects of the underlying S*Metamodel.

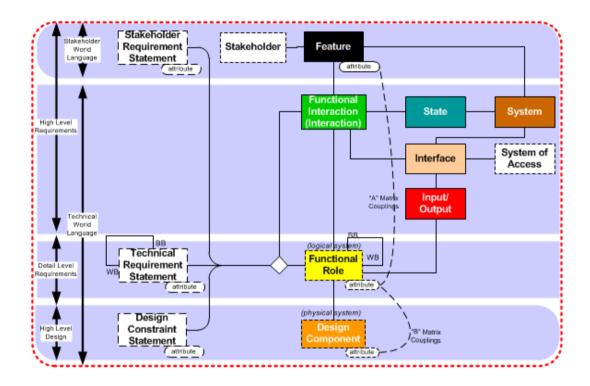


Figure 1: Key Elements from the S*Metamodel

- 2. **S*Patterns** are configurable, re-usable S*Models. (Not all historical system pattern work was based on the use of models, but S*Patterns are.) An S*Pattern may be thought of as a model of a family of systems, a platform, or a product line, or as an architectural framework. As shown in Figure 2, once an S*Pattern has been created for a given enterprise, product line, or other domain, it may be used during a delivery project to rapidly create a high-grade S*Model, typically an order of magnitude faster than by creating a new model, and configured for the specific needs at hand (Schindel, 2005a, 2011c, 2012, 2014, Schindel and Peterson, 2013, Schindel and Smith, 2002, Bradley, Hughes, Schindel, 2010, Cloutier, 2008, Alexander, 1977, Gamma et al, 1995, ISO 42010, 2011).
- 3. S*Models and S*Patterns are independent of any specific <u>modeling language</u>, and are typically expressed using any of a variety of the popular standard or third-party contemporary modeling languages, once a mapping is provided. (For example, in this paper some of the S*Models are expressed in SysML language.) This has the impact of strengthening the semantics of existing modeling languages in areas necessary to support key historical practices of engineering and science (Schindel, 2005, 2014a, 2014b, Schindel 2010).

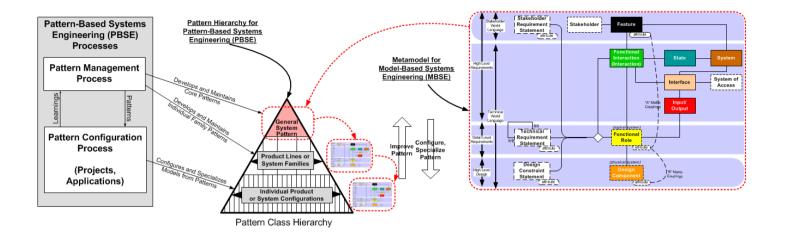


Figure 2: S*Patterns Are Configured to Generate S*Models

- 4. S*Models and S*Patterns are independent of any specific <u>software tool or information system</u>, and may be stored in and managed by a variety of popular third-party COTS modeling and engineering tools and information systems, once a mapping is provided. (For example, this paper illustrates S*Models and S*Patterns in several of the third party COTS system modeling tool, requirements database, and PLM systems that have been used in various domains.) This has the impact of increasing the value of existing COTS system modeling tools, requirements databases, and PLM systems already in use.
- 5. The processes of Systems Engineering consume and produce <u>information</u>. However, there is a long tradition of extensive descriptions of the <u>process and procedure</u> of Systems Engineering. Compared to the amount of ink and effort traditionally spent to describe SE process and procedure, the amount spent to describe information (which passes through those processes and procedures) is usually orders of magnitude less. Compare this to the amount of description of the underlying relationships of physics, chemistry, or electronics, versus the description of related engineering procedures. This imbalance was somewhat understandable in the day in which Systems Engineering information was in the form of prose, for which underlying "theory" is limited, but in the current day in which that information can be based on explicit models—the language of science and mathematics—we suggest a shift in this balance is in order. Figure 3 illustrates the model of both the SE process and the information passing through it, and the idea that the SE process should be primarily performed to drive trajectories in configuration space (Schindel, 2015).
- 6. The processes of MBSE as typically practiced today (Estafan, 2008), as well as more traditional Systems Engineering (ISO 15288, INCOSE SE Handbook, 2014) are most often presented, conceived, or practiced as if each engineering project is "starting from scratch" to "green field" conceptualize a new system of a sort never before conceived. Much procedural guidance is offered as to the discovery, study, synthesis, and analysis of stakeholders, requirements, allocations, and architectures, trade-spaces, risks and failure modes, etc., in a context that might lead one to believe the system of interest is being studied for the first time. Although nothing about this good guidance is

inappropriate in principle to engineering the next generation of established domain systems, there is a relatively low balance of guidance on the formal inclusion of what we already know with discovery of what is new. The "up stroke and down stroke" of Figure 2, deal with the relationship between managing formal model-based patterns of what is already known (similar to the physical sciences), configuration of that information to specific projects, and the interplay of the two. Recent progress with Product Line Engineering illustrates a start on progress to rebalance this situation (ISO/IEC 26550, 2013).

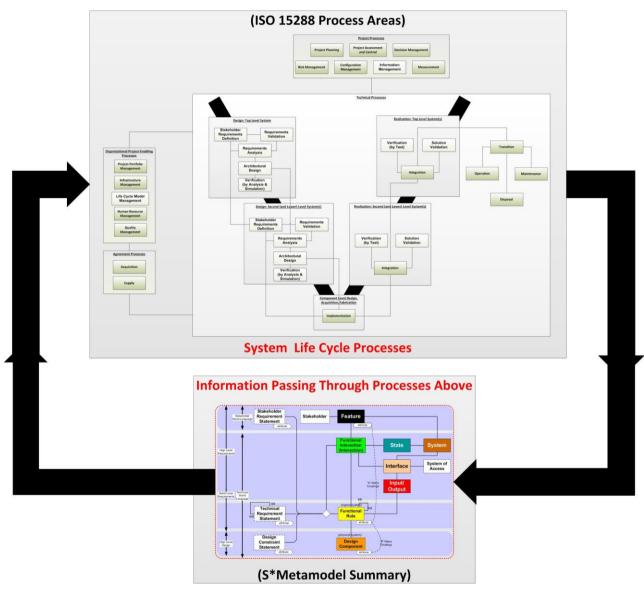


Figure 3: The MBSE Process Consumes and Generates S*Models

The Patterns Challenge Team has practiced use of S*Patterns to describe autonomous ground vehicles, automated safety critical system test, optimization of design review assignment, and (in this paper, below), cross-functional enterprise dependencies in product manufacturing businesses (Peterson et al, 2015; Cook et al, 2015; Pickard et al, 2015).

Integrating S*Patterns, at Enterprise and Lower Levels

Agricultural silos (Figure 4) are designed to minimize unwanted external interactions that are harmful to stored silage. The "silos" metaphor is an infamous description invoked to describe all-too-frequent organizational pathologies of a certain type—those in which lack of coordination, cooperation, teamwork, or alignment across parts of the organization rob the enterprise of optimum performance.



Figure 4: Silos—Good for Farms, Bad for Organizations

In the enterprise case, the systems engineer's interpretation focuses on the interactions (or lack of them) between the "functional silos" of the enterprise, along with external actors. The enterprise is a system, and a system is a collection of interacting parts. Based on those internal interactions (exchanges of information, mass flows, energy, forces), an overall enterprise behavior emerges, as "seen" by the external "actors" (for example, customers) through the external interactions with the "black box" enterprise, as in Figure 5.

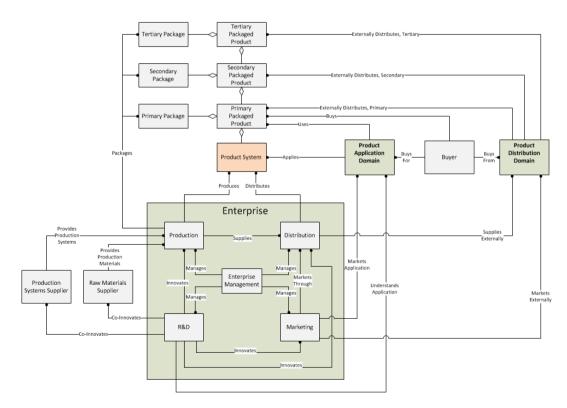


Figure 5: The Enterprise As System Embedded In Its Domain—An Example

The interactions of this perspective are a basic fact of nature about any organization, whether high-performing or not, whether healthy culture of not, and across all business and institutional models and domains. Just as we must not ignore the emergent characteristics of a designed product or a system-of-systems, likewise we ignore this aspect of organizations at our peril.

Instead of overlooking these challenges, we describe here how they can be embraced as sources of competitive advantage, built directly into the formalisms and information systems that help define the enterprise and its local and global practices. This begins by adopting an explicit model that focuses attention on the important interactions across organizational functions, using the Enterprise System Pattern.

The Enterprise System Pattern

For a given enterprise, the Enterprise System Pattern is an S*Pattern that can be configured for individual enterprise-level projects or other endeavours. This pattern is created once for the enterprise, but thereafter updated as learning occurs. The "system of interest" for this S*Pattern is the enterprise, illustrated by the Top Level System in the Vee diagram of Figure 3, and the Enterprise Domain Model of Figure 5.

Like all S*Patterns, the Enterprise Pattern includes all the S*Metamodel aspects, for which Figure 1 provides a summary. For this paper, two aspects of particular interest are:

- 1. Functional Interactions (a fundamental part of all S*Models) that span multiple subsystems of the Enterprise, or other Domains, visible in Figure 5. It is these "cross functional" interactions (or their absence) that are the source of "Silo Pathologies" of the Enterprise. The solution is to understand and manage the interaction as a whole, and this begins with its representation in a system model at the Enterprise level. An example benefit is illustrated later below.
- 2. <u>The Enterprise Management subsystem</u> is shown in the logical architecture of Figure 5. It is the "tip of the iceberg" of the Management System Pattern (aka the Embedded Intelligence (EI) Pattern). Figure 6 illustrates the hierarchy of (human and automated) Management Systems. Some of these appear again playing management and controls roles in enterprise subsystems of Figure 5, in later sections below.

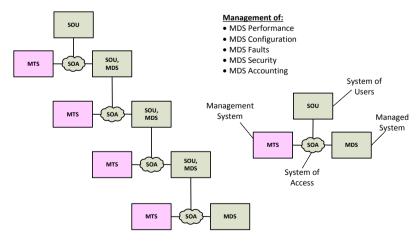


Figure 6: The EI Hierarchy of the Management System (Embedded Intelligence) Pattern

A key emphasis of this paper is the importance of explicitly modelling and managing the Enterprise level system, for successful enterprise projects. This can be very effectively performed by the PBSE approach, summarized in Figure 2:

- 1. Pattern Management Process: Creating and improving the configurable, re-usable Enterprise S*Pattern in an appropriate modelling tool. S*Patterns may be so managed in a number of popular third party modelling tools, some of which are illustrated in this paper. This part could be viewed as establishing the S*Model minimum for the content of an Enterprise architectural framework, as in (ISO 42010, 2011).
- 2. Pattern Configuration Process: For each major enterprise project or endeavour, configuring that pattern as an S*Model of that project. This does not necessarily require a full modelling tool, and such project-specific configured models can be managed in a PLM system, over the life cycle of the project (or product), as in Figure 7. S*Models may be so managed in a number of popular PLM, modelling tool, or other information systems.

The connection from (1) to (2) above is the S*Pattern Configuration Agent, which can be attached to a number of different third party modelling or PLM systems. Part of the Pattern Configuration Process is illustrated in Figure 12.

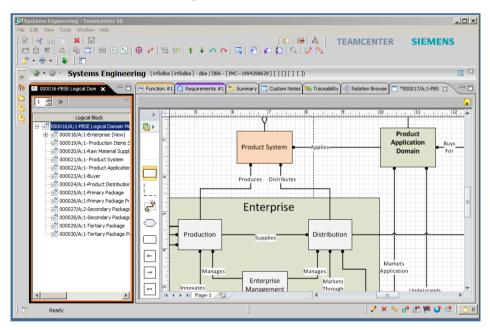


Figure 7: PLM System: A Natural Model Life Cycle Repository for an Enterprise Pattern That Has Been Configured for a Project

The Product Application Domain Pattern

The Product Application Domain Pattern, another S*Pattern, describes the enterprise's product (or platform, product line, family) in service in its intended application domain. This pattern also includes all the S*Metamodel aspects, including those summarized by Figure 1. Like the Enterprise Pattern described above, the Product Pattern is managed in some modelling environment, separately configured for each product configuration or project, and those configured S*Models are suitable to be managed in a PLM, modelling tool, or similar information system.

For some classes of products, it is most efficient for the scope of this pattern to include the product's packaging—consumer products and pharmaceuticals are typical examples. For other product types, the packaging aspects are modelled as part of the Distribution Domain. A subset of the views typical of S*Models are illustrated below for an example family of manufactured products—the Oil Filter Product Line. The views shown in this section illustrate the use of OMG SysML modelling language and tools, all of which can be readily mapped to the S*Metamodel. There are equivalents if other modelling languages and tools are used:

1. A <u>Stakeholder Feature Model</u> describes the set of configurable features available in the product line. This part of the S*Pattern marks the point at which configuration for specific products will occur. Its stakeholder attribute set establishes the trade space for the system family. See Figure 8.

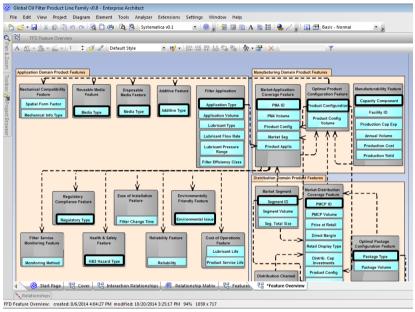


Figure 8: Stakeholder Features Overview

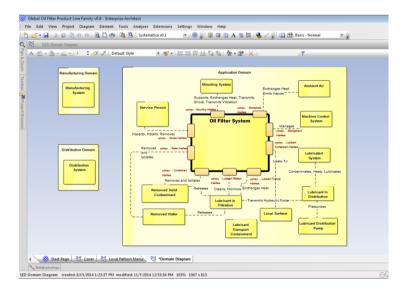


Figure 9: Domain Model

- 2. A <u>Domain Model</u> describes the external domain environment that the subject system (Packaged Product Oil Filter, in this case) will encounter and physically interact with, over its life cycle, ultimately traceable to all system functional requirements and stakeholder features. See Figure 9.
- 3. A <u>Logical Architecture Model</u> describes the partitioning of the system in the logical subsystems, short of their allocation to the physical architecture, also part of the configurable S*Pattern. See Figure 10.

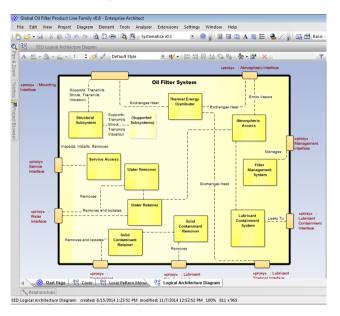


Figure 10: Logical Architecture Model

4. A <u>State Model</u> describes the temporal framework of system states, modes, or situations, including what system Interactions are expected to occur during each such state. See Figure 11.

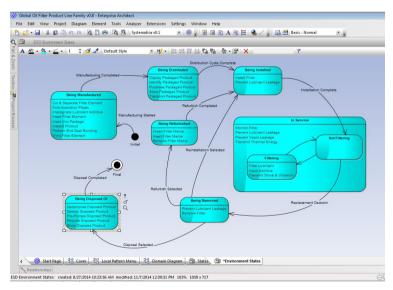


Figure 11: State Model, Including Interactions

For a project, each applicable S*Pattern (Enterprise, Product, Manufacturing System, etc.) is configured to specific S*Models applicable in that case. This may be performed on any

information system (COTS modelling tool, PLM system, etc.) that has been mapped to the S*Metamodel and set up with an S*Configuration Agent algorithm. For example, the process of configuring Oil Filter Product Pattern Features is shown in Figure 12, and the resulting configured System Requirements are shown in Figure 13.

Mandatory, Optional, or Other Configuration Rule	Populate? (Yes/No)	Feature Name	Feature Attribute Primary Key (PK) Attribute Name	Feature Attribute PK Value #1	Feature Attribute PK Value #2	Feature Attribute PK Value #3	Feature Attribute PK Value #4	Feature Attribute PK Value #5	Feature Attribute PK Value #6
One per Filter	Yes	Filter Application	Application Type	Consumer					
Application Type		Feature		Automotive	▼				
Mandatory for	Yes	Mechanical		Consumer Automotive Commercial Automotive					
Oil Filter		Compatibility Feature		Fixed Based Engine Sys					
Mandatory for	Yes	Cost of Operation		Harsh Environment High Temperature Envir	·or				
Oil Filter		Feature		Cold Environment	0				
Mandatory for	Yes	Reliability Feature							
Oil Filter									
One Per	Yes	Additive Feature	Additive Type	additive #321					
Additive Type									
Optional	No	Disposable Filter	Media Type						
		Media Feature							
Optional	No	Reusable Filter Media	Media Type						
		Feature							
Optional	No	Filter Service							
		Monitoring Feature							
One Per	Yes	Environmentally	Environmental	Solid Waste	Gaseous	Lubricant			
Environmental		Friendly Feature	Issue	Disposal	Emissions	Leakage			
Issue									
One Per	Yes	Regulatory	Regulatory Issue	Solid Waste	Gaseous	Lubricant	Hazardous	Sharp Edges	
Regulatory Issue		Compliance		Disposal	Emissions	Leakage	Materials		
One Per Health	Yes	Health & Safety	H&S Hazard Type	Hazardous	Sharp Edges				
& Safety Issue				Materials					

Figure 12: Configuring Pattern Features, to Generate Configured System Model

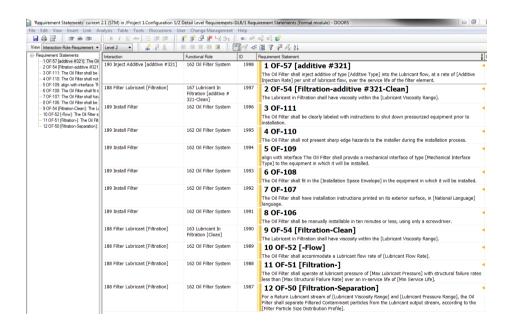


Figure 13: Resulting System Requirements, Configured for Project

The Manufacturing System Pattern

The Manufacturing System Pattern, another S*Pattern, describes the enterprise's manufacturing systems (processes, equipment, controls, people, facilities, materials). This pattern also includes all the S*Metamodel aspects, including those summarized by Figure 1, and having views similar to the preceding Product model series. Like the S*Patterns described above, the Manufacturing System Pattern is managed in some modelling environment,

separately configured for each manufacturing system configuration or project, and those configured S*Models are suitable to be managed in a PLM, modelling tool, or similar information system. For some enterprises, it is most efficient for the scope of this pattern to include the product's packaging systems—consumer packaged products and pharmaceuticals are typical examples. Some of the principles of Manufacturing and Packaging System Patterns are described in (Bradley et al, 2010, and Schindel, 2012b).

A subset of the views typical of S*Models are illustrated in Figure 14 for an example family of manufacturing systems—those which produce the Oil Filter Product Line. The views shown in this section illustrate the use of another COTS engineering tool, again mapped to the S*Metamodel, so it can store the same compatible model data. There are equivalents if other engineering tools are used:

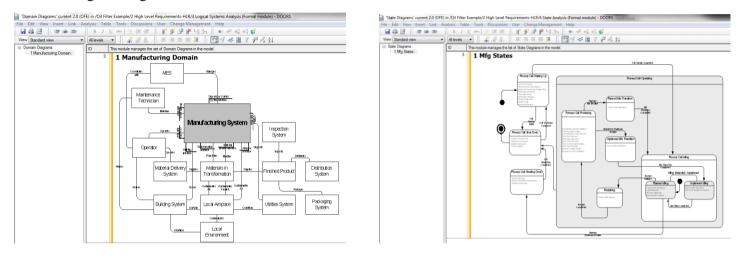


Figure 14: Manufacturing System Domain and State Model Views

The Perform End Seal Bonding interaction of the example Manufacturing System Pattern is based on the transfer function modelling principles of (Schindel, 2005) and the manufacturing transformation principles of (Schindel, 2012b). Figure 15 illustrates model views of two attribute couplings associated with this interaction and a later product life cycle interaction:

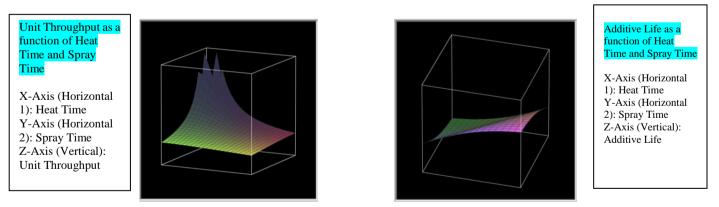


Figure 15: Manufacturing System Interaction Attribute Coupling Map Views

The System of Innovation Pattern

Referring to the R&D enterprise subsystem of Figure 5, the System of Innovation Pattern is another S*Pattern, describing the enterprise's system of innovation for creating new or modified configurations of all the other enterprise subsystems shown in Figure 5. It thus

includes product development, but also manufacturing process development and equipment engineering, distribution, and other aspects. This pattern also includes all the S*Metamodel aspects, including those summarized by Figure 1. Like the Enterprise Pattern described above, the SOI Pattern is managed in some modelling environment, separately configured for each innovation project, and those configured S*Models are suitable to be managed in a PLM, modelling tool, or similar information system.

The System of Innovation (R&D) Pattern returns us to Figure 3, which summarizes one "slice" of that pattern—the familiar Systems Engineering "Vee", including appearances of each of the processes of (ISO 15288, 2008, 2014). The System of Innovation Pattern is in fact a formal S*Model of ISO15288, so the "Vee" view is only one informal high level summary of a more explicit model. For example, Figure 16 shows more details of the SOI Pattern for the Verification Process of ISO 15288.

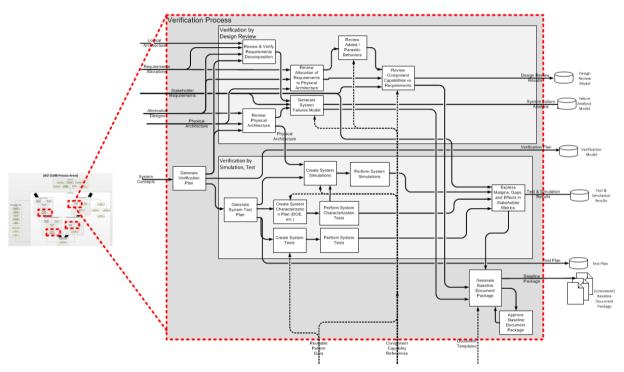


Figure 16: Example Drill-down Into System of Innovation Pattern-The Verification Process Model

A key aspect of the SOI Pattern is that it explicitly recognizes both MBSE and Pattern-Based methods. For example, Figure 16 shows the use of configurable patterns of system verification—represented as configurable pattern data entering from the bottom of Figure 16. This is further discussed in (Cook et al, 2015) and (Nolan, et al, 2015).

The System of Innovation Pattern includes roles played by human and automated agents, across the life cycle of systems. These include activities associated with diverse existing COTS automation tools, including (SysML or other) modeling tools, requirements management databases, and PLM systems from multiple suppliers. As shown in Figure 17, an S*Metamodel schema map (profile) is provided for each such system, so that they can uniformly represent project-specific configured S*Models and generalized S*Patterns. S*Configuration Process agents likewise provide a unified approach to configuring S*Models from S*Patterns.

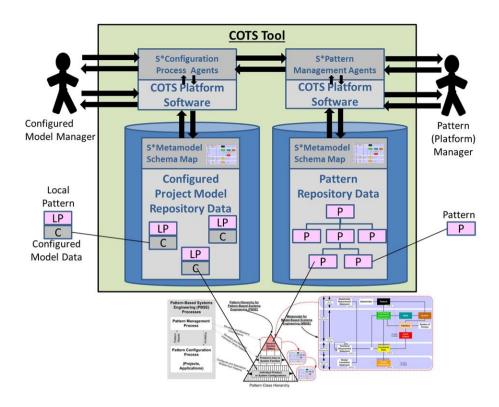


Figure 17: Existing COTS Engineering & Modeling Tools, PLM Systems Can All Support Common Underlying S*Metamodel, Innovation Processes

Many third-party COTS tools and information systems provide some means of data exchange among them, using standards-based or other types of exchange interfaces. The approach described here goes further, by providing a deeper underlying semantic compatibility between these existing systems, while still taking advantage of the available exchange interfaces. This is more than an information technology approach, as further aligns the semantics of how human users of these systems conceive of the information they manage. As illustrated in this paper, such approaches have been taken to further leveraging the power of existing COTS systems such as Siemens Teamcenter®, Dassault Systemes ENOVIA®, IBM Rational DOORS®, and SysML® tools such as Sparx Systems Enterprise Architect® and IBM Rational Rhapsody® Architect. Along with their human users, these play Management System (MTS) roles in the hierarchy of Figure 6, integrated within the Enterprise Pattern of Figure 5, for (ISO 15288) specialized work processes, views, and artifacts described by a configured System of Innovation Pattern, such as those in Figure 16.

Example: Integrating Product Development and Production

The explicit physical interactions structure of the S*Metamodel guarantees that each case of enterprise "silo" problems will be visible in the model, associated with boundary-crossing interactions and the emergent behavior that the resulting interaction demonstrates. An example is Product Application Domain interactions for an in-service Oil Filter System product (e.g., Filter Lubricant, Inject Additive) and Production Domain interactions (e.g., Perform End Seal Bonding, Impregnate Lubricant Additives). The attribute couplings of Figure 15 capture the impact of production rates, pressures, temperatures, and raw material characteristics on in-service product reliability, pressure rating, and life. An integrated framework for negotiating and optimizing these across Process Engineering and Product Design is the result.

Summary and Conclusions

MBSE in general, and model-based patterns (PBSE) in particular, not only apply across the enterprise—they can directly address enterprise-level challenges that arise out of interactions of lower-level enterprise subsystems. The expressive power of explicit models is further leveraged when they do not have to be developed "from scratch" for each project, but can be derived from patterns that themselves accumulate learning as it occurs, becoming a new form of IP, increasing the agility of the enterprise. Existing and in-service engineering model and simulation tools, databases, and PLM systems have their power increased when they are further enabled to accommodate the stronger semantics of the S*Metamodel.

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William D. (Bill) Schindel is president of ICTT System Sciences. His engineering career began in mil/aero systems with IBM Federal Systems, included faculty service at Rose-Hulman Institute of Technology, and founding of three systems enterprises. Bill co-led a 2013 project on the science of Systems of Innovation in the INCOSE System Science Working Group. He co-leads the Patterns Challenge Team of the OMG/INCOSE MBSE Initiative

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