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Discovering the Value of IBM Content-Centric Business Process Management

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Welcome to the Technical Exploration Center

- Welcome
- Access restrictions
- Restrooms
- Emergency Exits
- Smoking Policy
- Breakfast/Lunch/Snacks – location and times
- Special meal requirements?

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Discovering the Value of IBM Content-Centric Business Process Management
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Agenda

- **Introduction**
  - Introduction to PoT and class introductions
  - Instructor-led hands-on tour
  - BPM Overview
- **Process Modeling**
  - Overview of process modeling and options
- **Process Definition**
  - Process Designer: steps, submaps, routing, work assignment, etc
  - Lab - Process Designer
  - LUNCH
  - Component Integration Options
  - Lab - Component Integration
  - Process Tracking and Notification
  - Lab - Process Tracking and Notification

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Agenda continued

- **Process Optimization**
  - Process Analyzer and Process Simulator
  - Lab - Process Analyzer
- **Performance Management**
  - Business Activity Monitor
- **Discussion - Next Steps**
- **Summary**

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Class Introductions

- Please introduce yourself
- Name and organization
- Current content technologies/tools in use
- BPM and Content areas of interest

What do you want out of this session?

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Objectives

- Hands-on tour
- Define our use of “Business Process Management (BPM)”
- Identify and use the components involved in a Content-Centric BPM solution
- Visualize the value of such a solution to your organization
- Plan your next steps

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Instructor-Led Hands-on Tour of Focus Corp

Become familiar with your lab image

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New Account Opening Business Context

Focus Corporation needs to:

- Accelerate processes by streamlining & automating
- Link to Line-of-Business systems and leverage your investment
- Enable people to make better decisions, faster
- Analyze and improve to gain every competitive edge
- Deliver superior customer service to drive profitability

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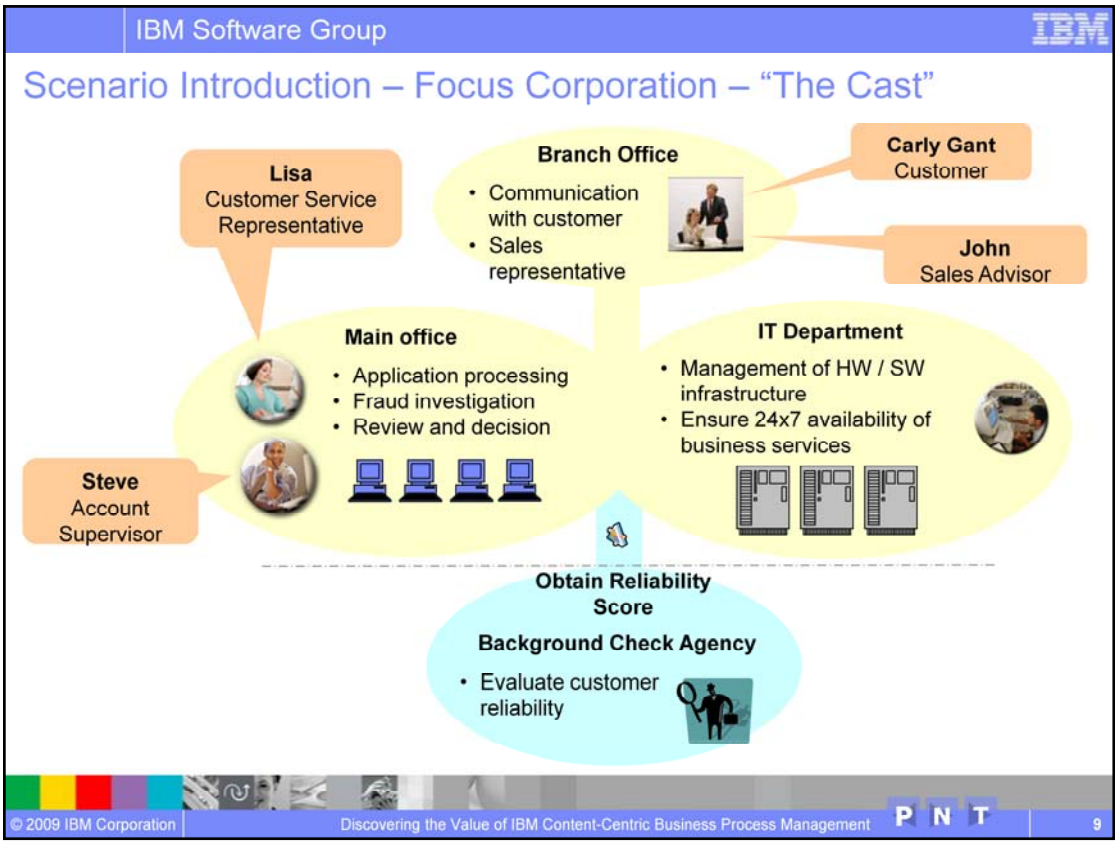


Additional Information:

Focus Corporation offers a range of financial products and services through its large network of branch offices. We will be using the new account origination scenario as the basis for our business process labs today.

We will role play a number of characters:

•Carly Gant is a new customer wishing to open an account

•John is a Financial Sales Advisor working in a branch office of Focus Corporation

•Lisa is a Customer Sales Representative responsible for reviewing the required documentation

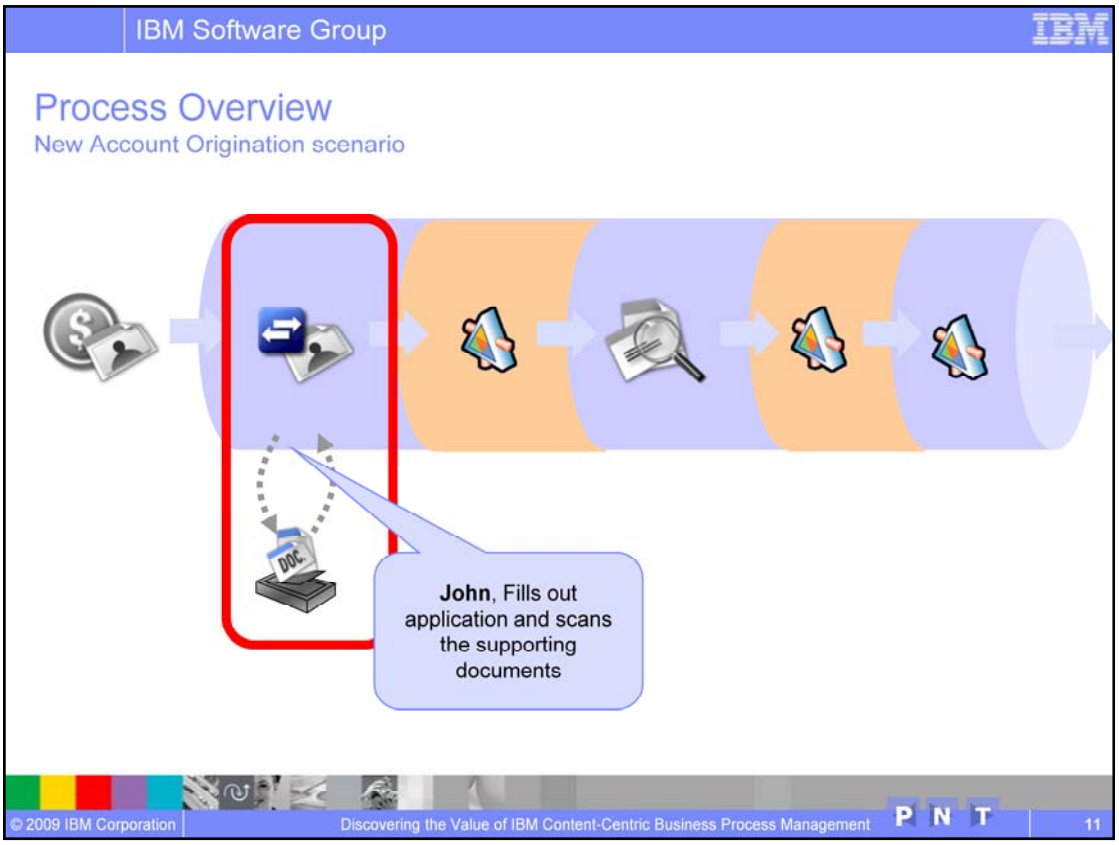
•Steve is the Account Supervisor responsible for the final decision in exception conditions

The IT Department ensures that the infrastructure and services are managed to ensure systems availability

The process also requires connection to third party services organizations, such as the Background Check Agency who provide rating services for risk assessment. The connectivity is orchestrated by the process accessing the business and technical services available as part of Focus Corporation's service orientated architecture.

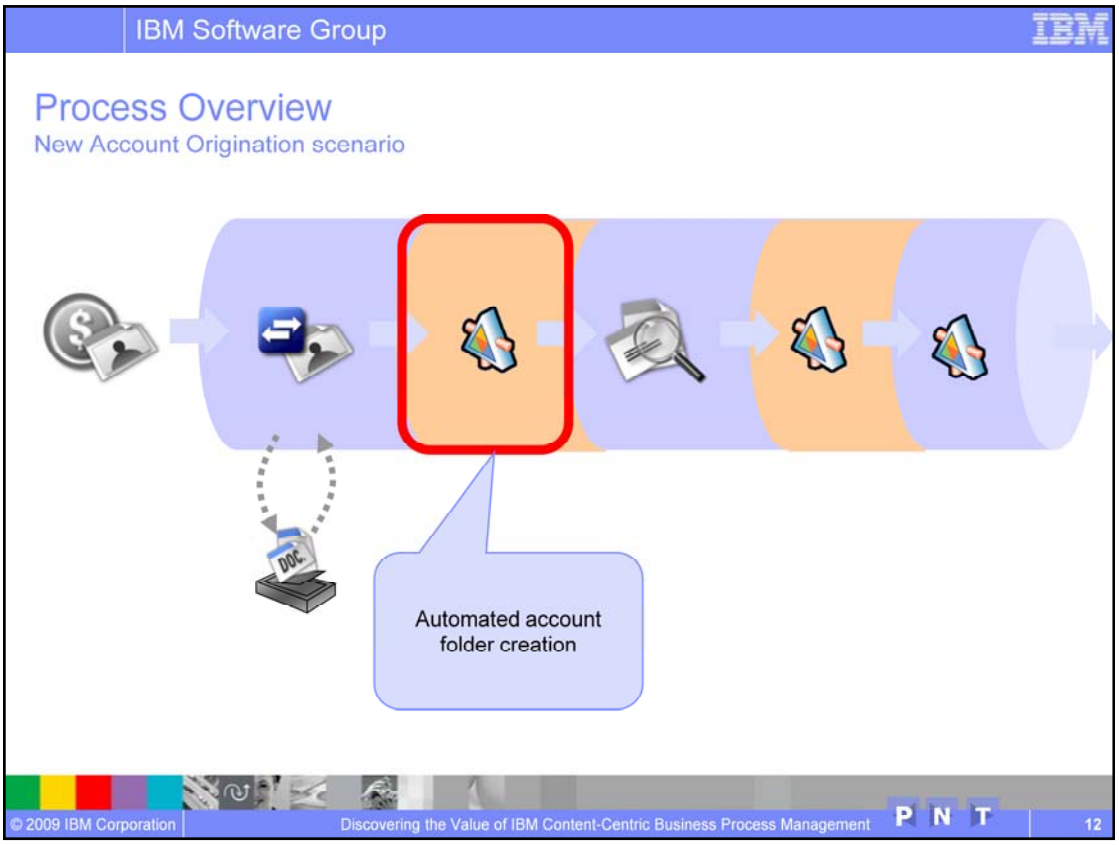
Additional Information:

An existing Focus Corporation customer, Carly Gant, enters a branch office to establish a new investment account.



Additional Information:

To assist Carly, the sales advisor, John, accesses his Focus Financials Workplace. The sales advisor works with Carly to complete and submit a new account application. Based on information supplied on the form, different processing will occur. Applicants that are not a resident of the U.S. are required to supply additional documentation (e.g., passport, W-8BEN). Also, initial contribution amounts of $10,000 or more require a fraud review. The form will reflect that Carly is a non-resident and has an initial contribution amount exceeding $10,000. The completed form will automatically be saved in the object store and the New Account Opening workflow will be launched. Since Carly is a non-resident, the new account application will wait on the process until both a passport and Certificate of Foreign Status (W-8BEN) form are received. Fortunately, Carly has her passport with her and completes the W-8BEN while she is in the office. John scans these items to the file system. Using an entry template, the newly scanned documents are saved in the object store.



Additional Information:

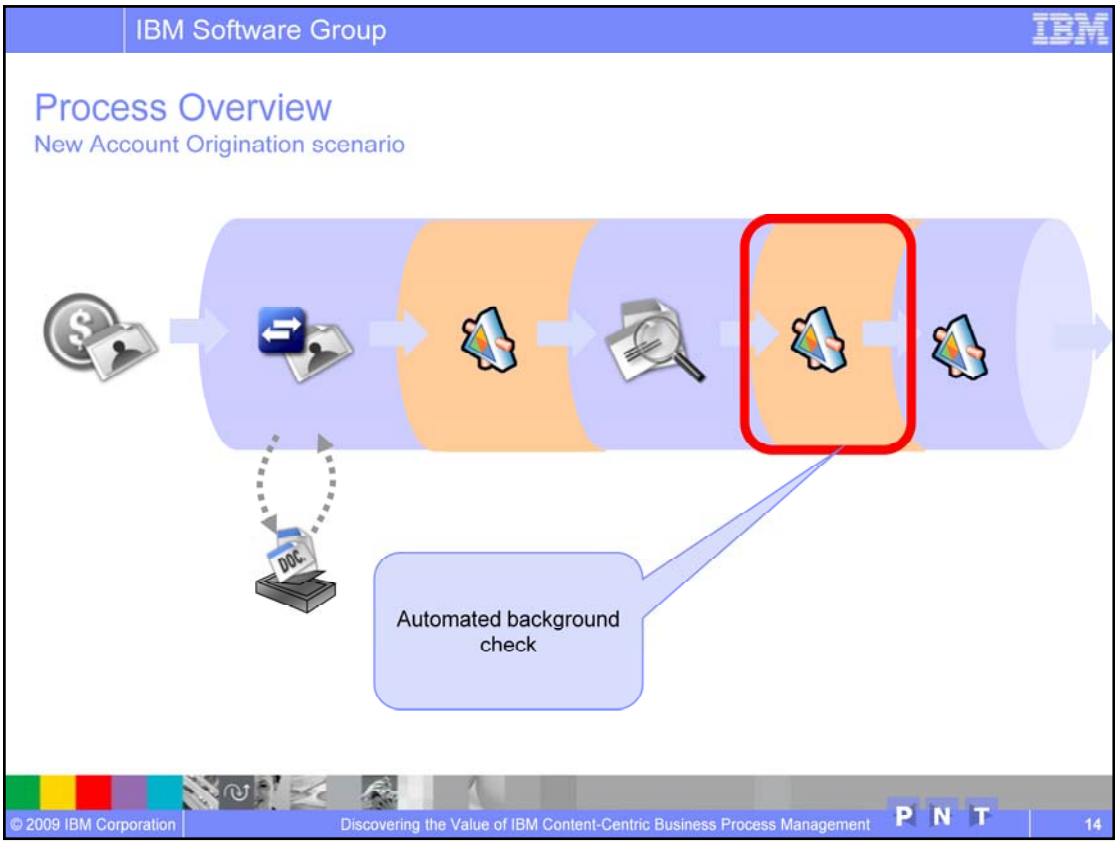
When the new account application was submitted, the New Account Opening workflow was launched, a folder was created and named with the unique account number, and the new account application was filed in the folder. Likewise, the supporting documents also became active content and were automatically filed in the account folder.

The folder and contents can be observed from the Accounts portlet.

Additional Information:

Non-resident investment account applications and supporting documentation will be reviewed by the Customer Service Representative, Lisa. She will work with the customer to resolve any issues.

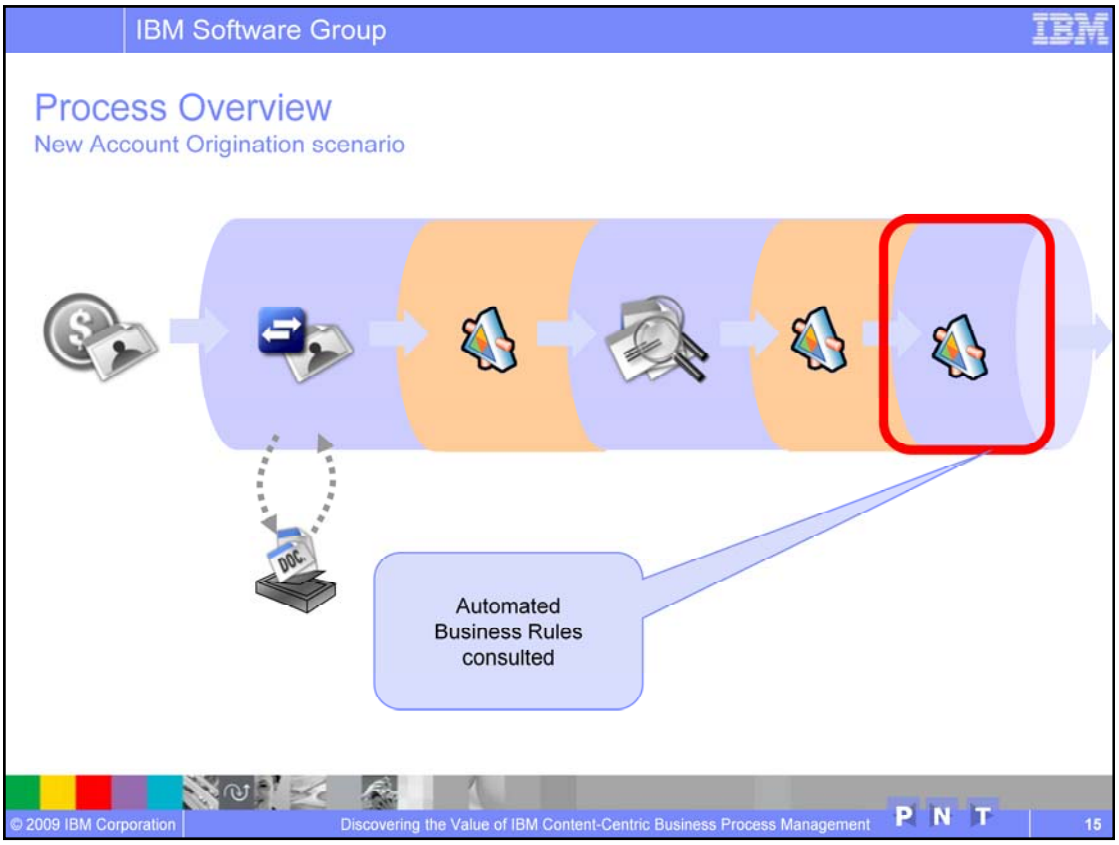
After viewing the documents, Lisa will complete the work item, indicating that processing should proceed.



Additional Information:

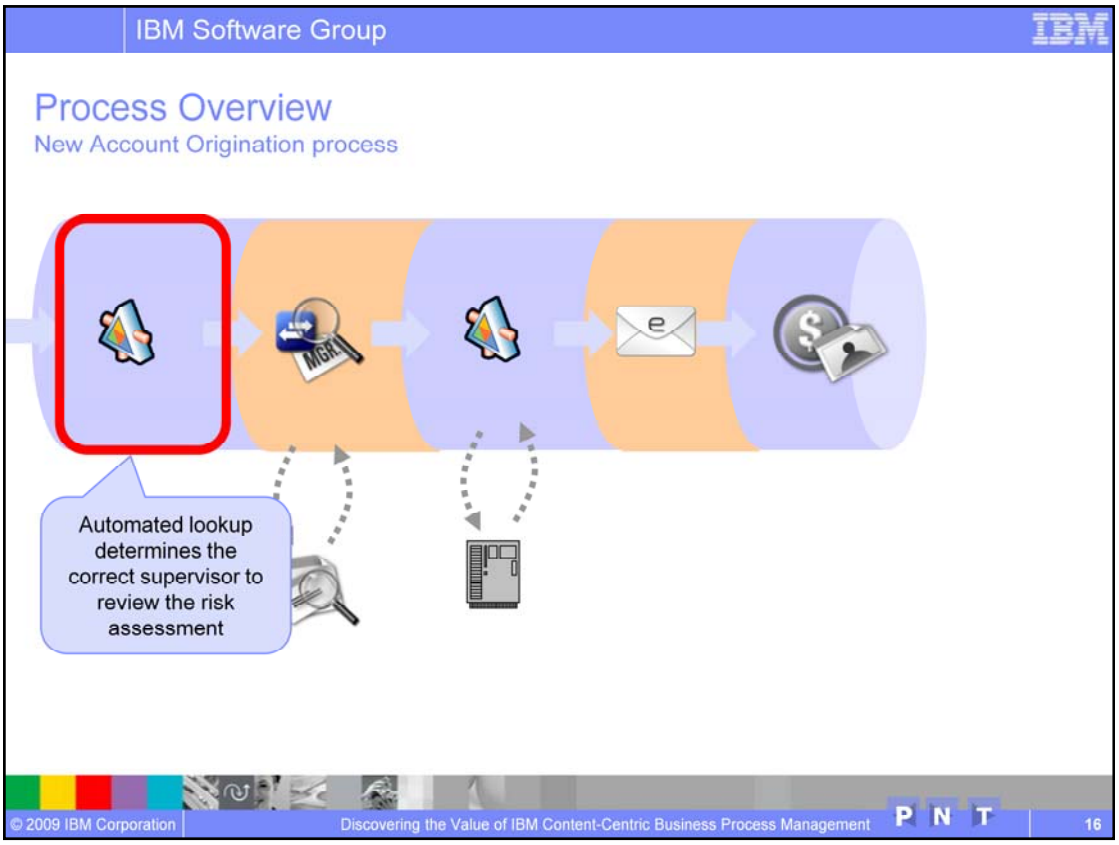
The next step of the workflow is a background check on the customer. This is accomplished using a published web service that is provided by an outside vendor to aid in the processing of the application and to meet regulatory standards.

NOTE: for later labs, the background step will start out as a manual step. Process analysis indicates this is very time-consuming so you will make the changes to automate the step to use the web service in the later lab.



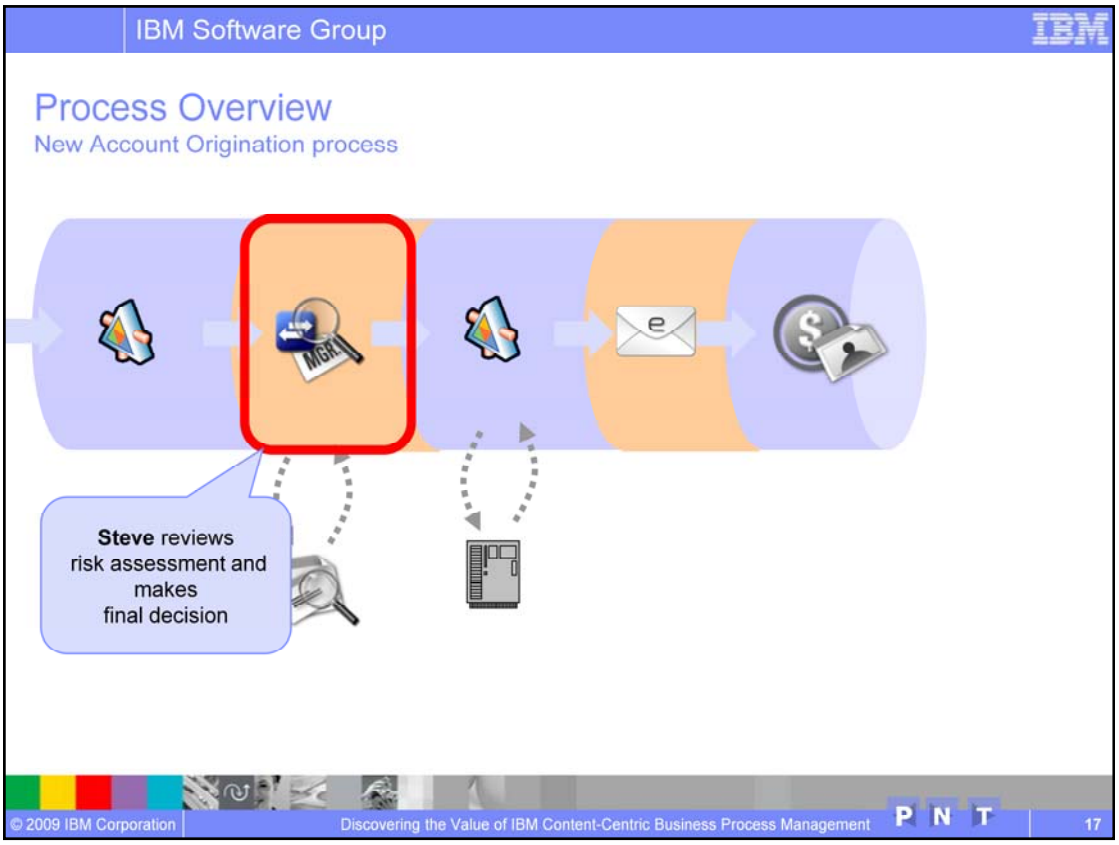
Additional Information:

After the customer background check, business rules will be evaluated to determine whether a fraud review is required. This is accomplished through integration with an external rules engine.



Additional Information:

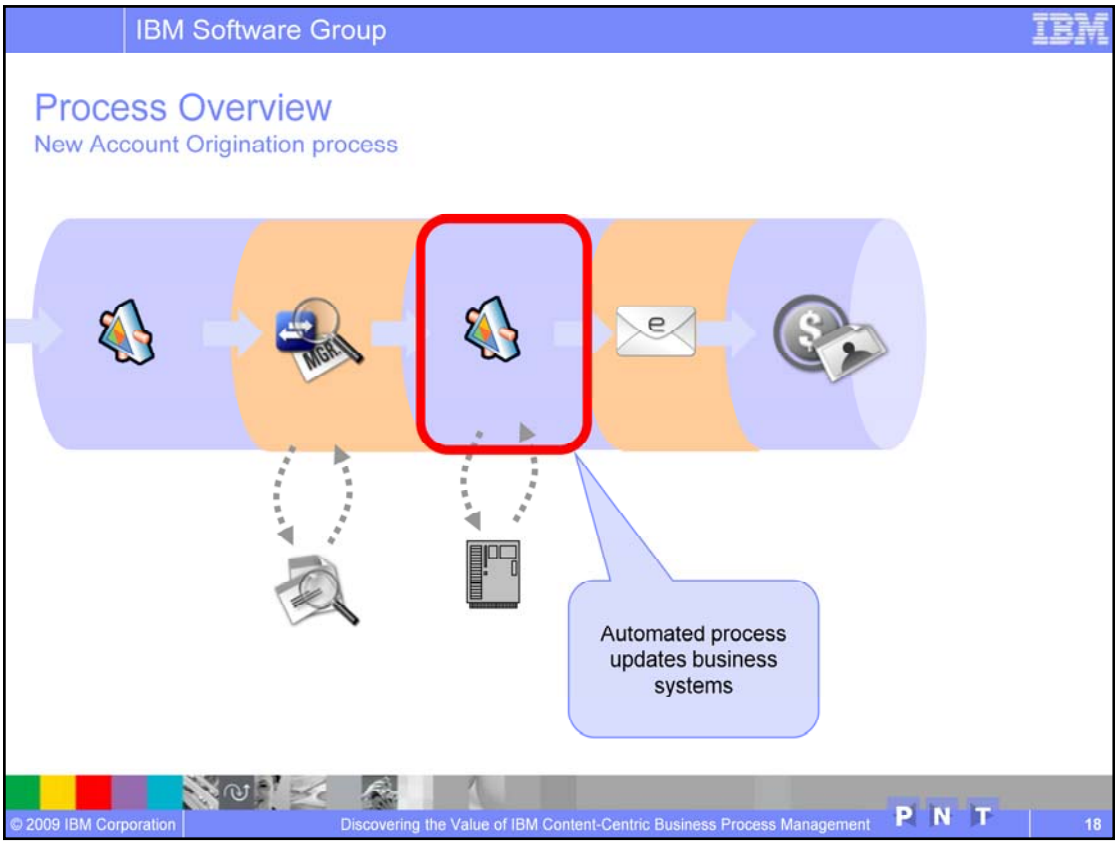
One of the business rules is to have a supervisor review applications with an initial contribution exceeding $10,000. Since the initial contribution amount is over $10,000, the system will determine which supervisor should perform the review.



Additional Information:

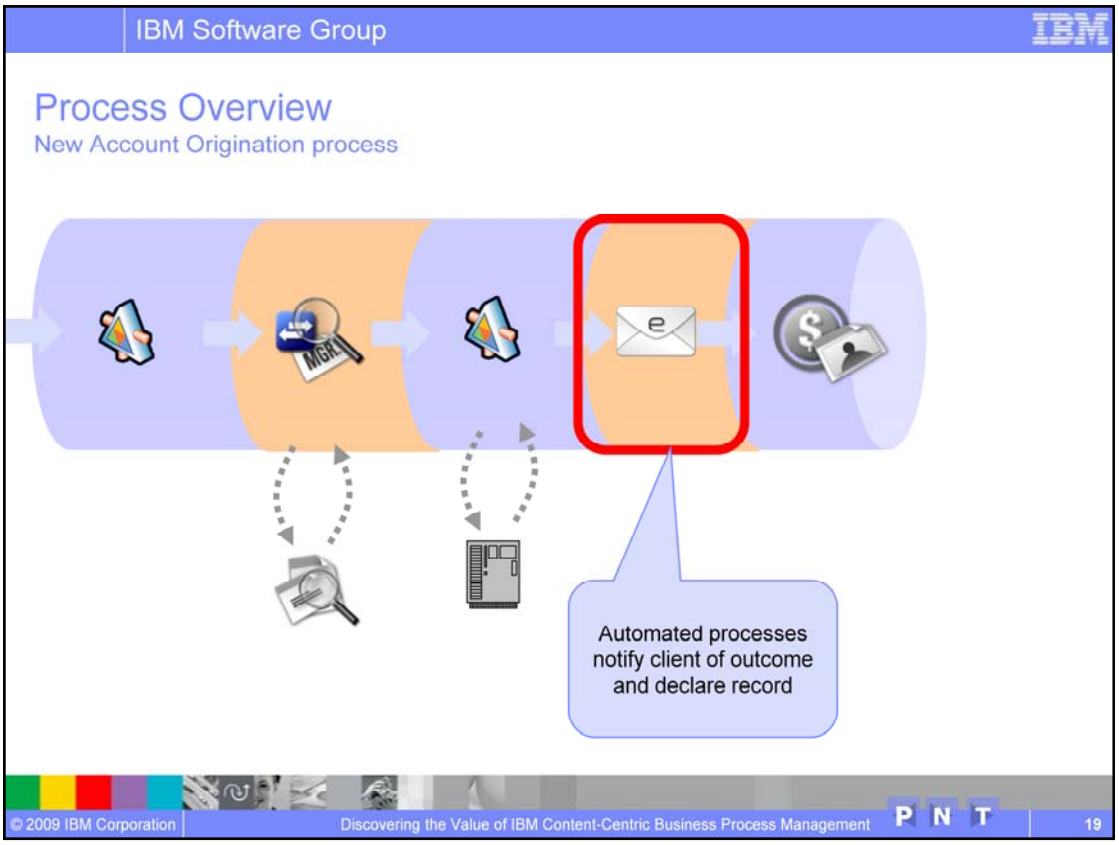
Steve, a supervisor, has the ability to reassign the work to another user for their opinion, accept the work and have processing continue, or to decline the work. If the work item is declined, it will be sent to the Fraud Department.

Steve will complete the work item indicating that the particular account can be processed.



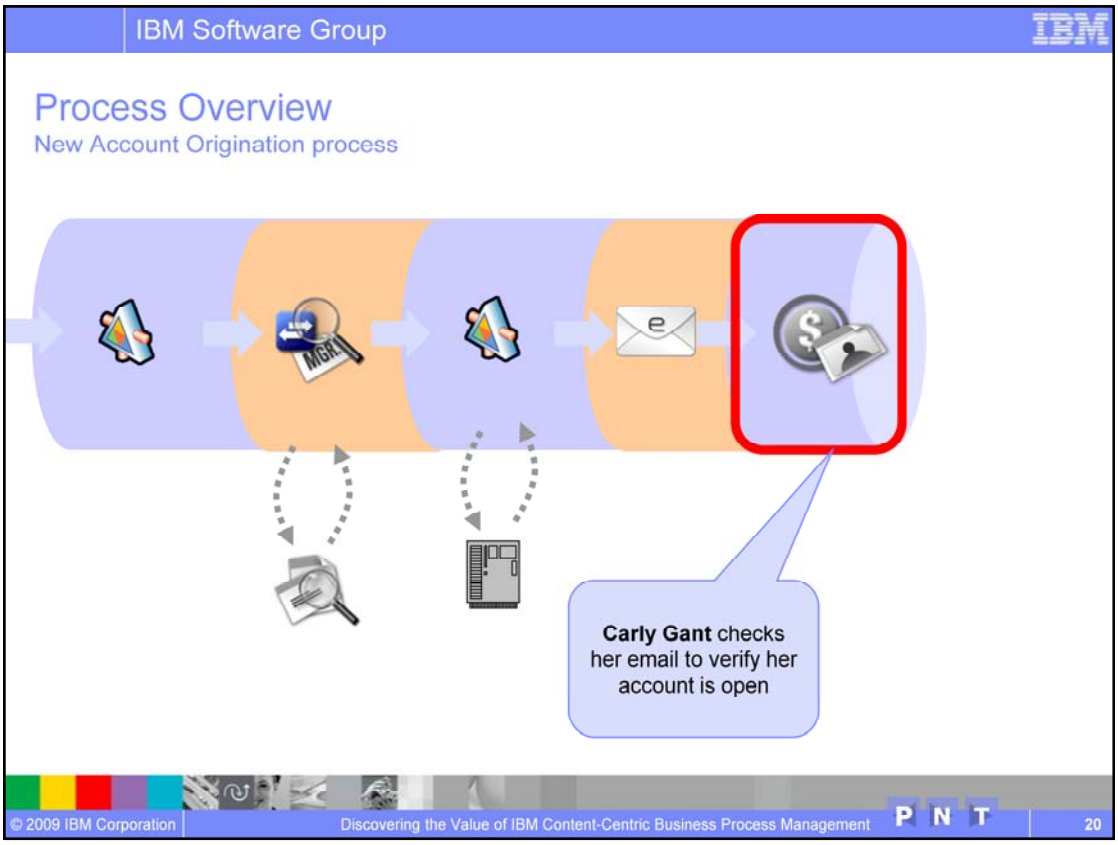
Additional Information:

The process will update a existing line-of-business database with the new account information.



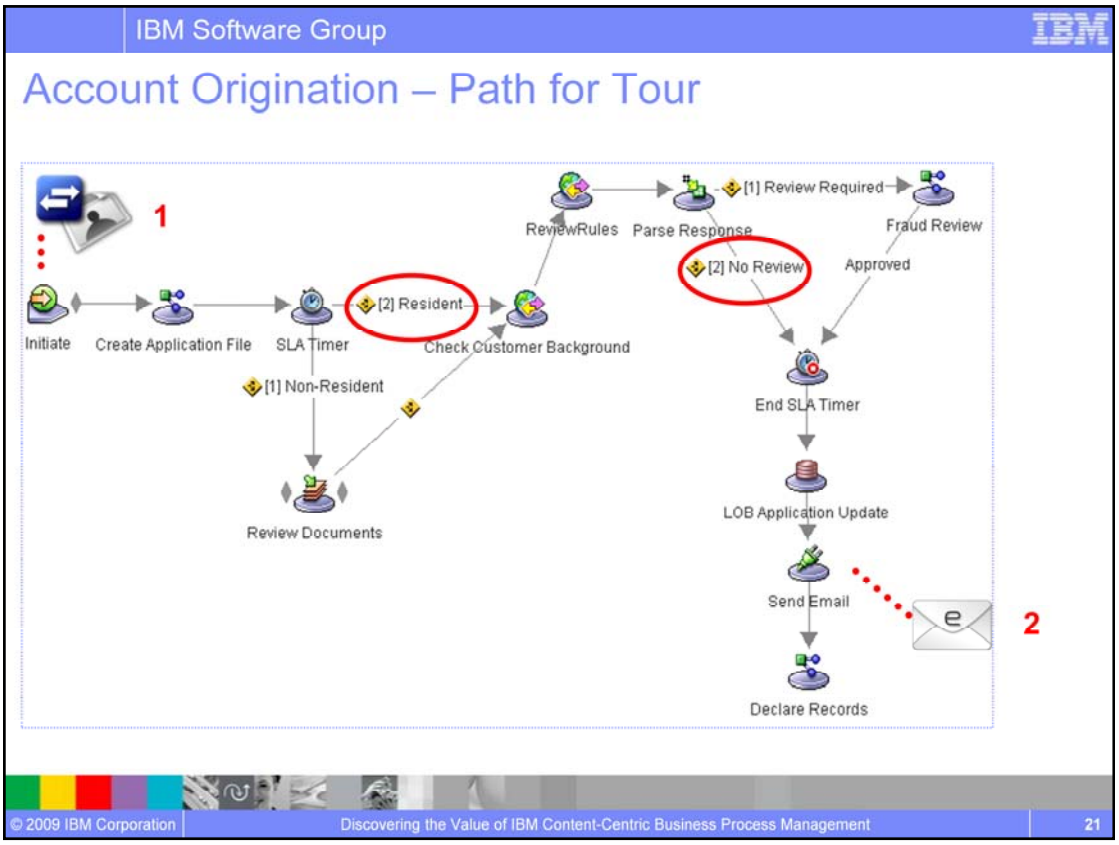
Additional Information:

Additional steps will automatically send an email notification to Carly with information about her new account, and place the documents under records management control.



Additional Information:

Last, Carly will open her email to confirm her new account has been established.



Additional Information:

For the hands-on tour, the information provided will have Carly be a resident with less than $10,000. This will cause this instance of the business process to have maximum automation with minimum costly human interaction – straight-through processing. John will fill out the form (1), and the only other human interaction is Carly viewing her email (2).

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Lab: Tour Your Focus Corp Lab Machine

Overview

Introduction	This lab will introduce you to the look and feel of the Focus Corp sample application that will be the basis of the lab exercises during the day. You will originate a new Focus Financial account.
Lab Objectives	•Start the Focus Corp Workplace •Fill out and submit a new account form •Verify the account was opened
Exercises	This lab contains the following exercise:

Exercise	Lab Page
Step-by-Step – Business Process Management	25-39

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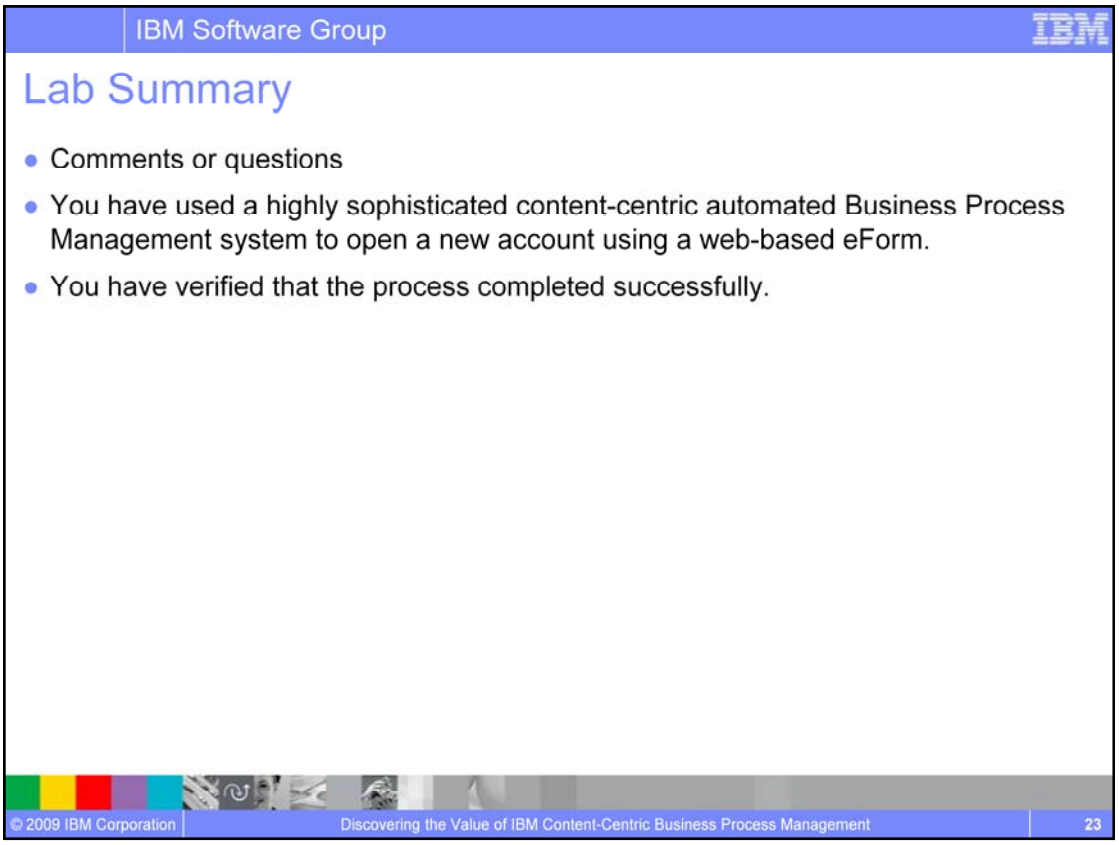
Additional Information:

The lab architecture:

- VMware image
- IBM FileNet P8 V4.0 platform on Windows 2003
- Configured for Focus Corp account origination scenario
- Corticon rules engine installed
- Argo email server installed

Take a tour of the lab guide – something to take back and use as a reference:

- New Account Origination Scenario
- Introduction to Business Process Management
  - Reference Material
  - Step-By-Step (lab) material



Additional Info:

To summarize, this demonstration highlighted the significant business value an integrated content-centric BPM platform can bring to your organization. Capabilities such as comprehensive Content Management, Electronic Forms and Business Process Management linking processes, content, people and systems can translate into significant savings in terms of total cost of ownership.

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BPM Overview

Why is Business Process Management important to you?

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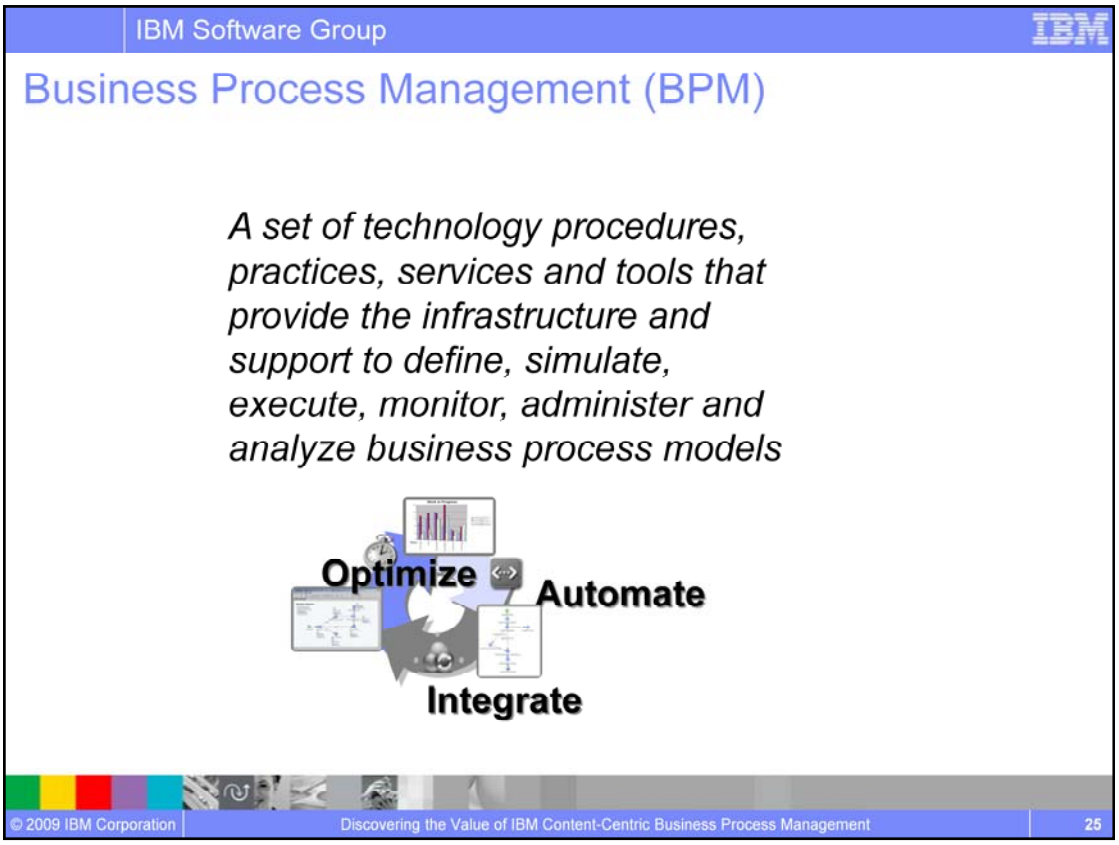
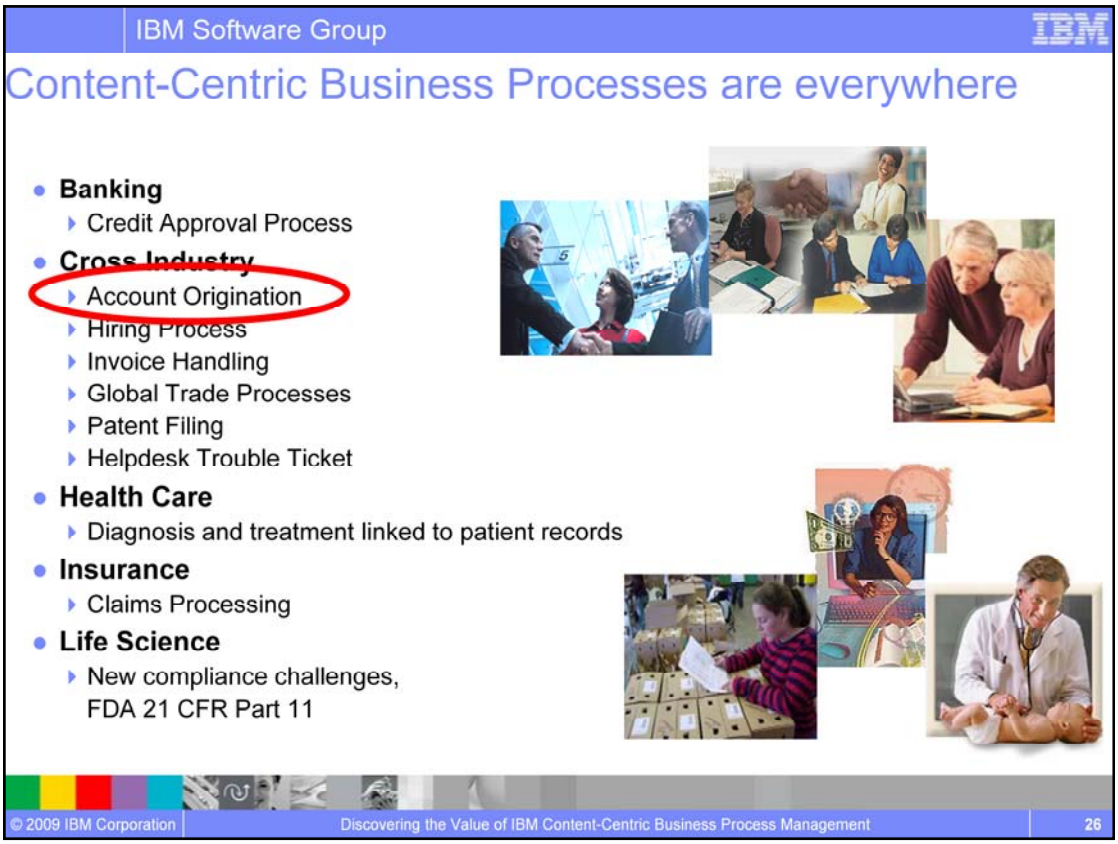


Additional Information:

What is Business Process Management? It's a discipline combining **software** capabilities and business **expertise** to **accelerate process improvement** and facilitate business innovation

IBM FileNet Business Process Manager automates and optimizes business processes by managing workflow and content between people and systems.



Additional Information:

Content-centric business processes are everywhere across all industries.

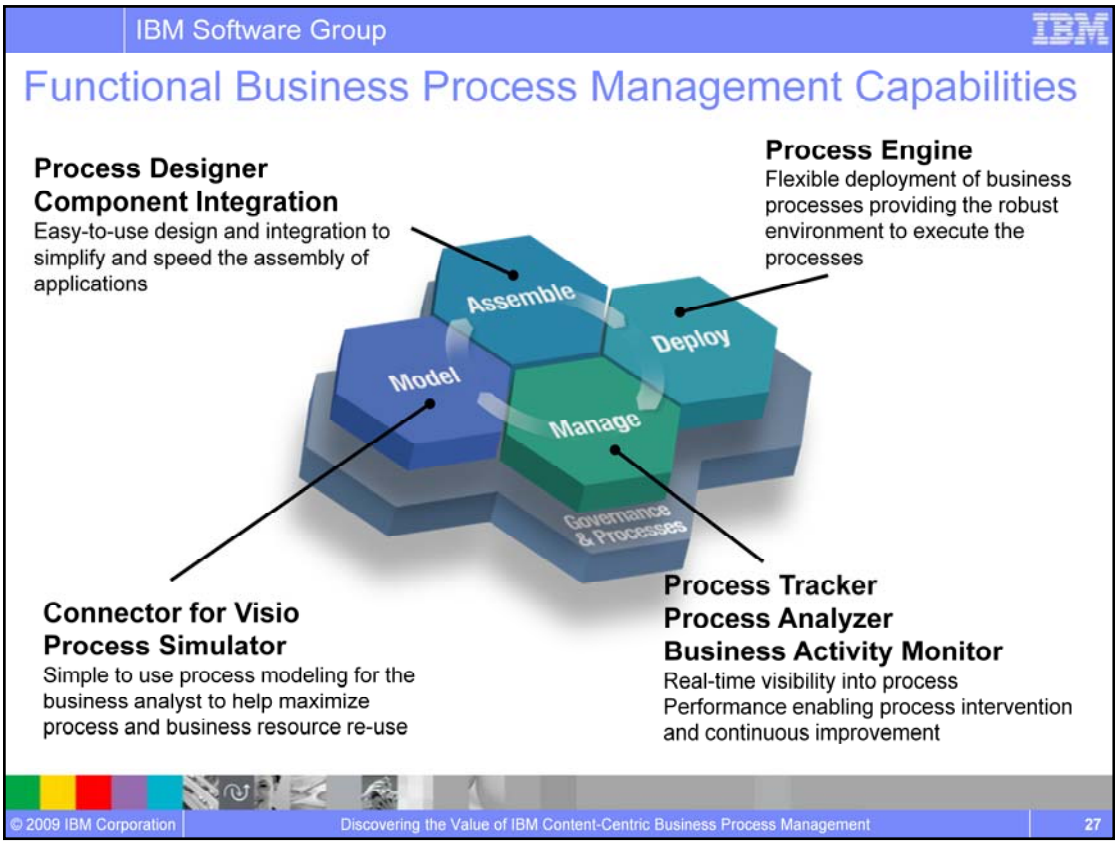
Typical examples are account opening, claims processing, and loan origination.

However, just think about how many activities you come across in your life where a form is required and some associated processing must take place in regards to that form.

FDA = Food and Drug Administration

CFR = Code of Federal Regulations

(Part 11 describes the technical and procedural requirements that must be met if a person chooses to maintain records electronically and use electronic signatures.)



Additional Information:

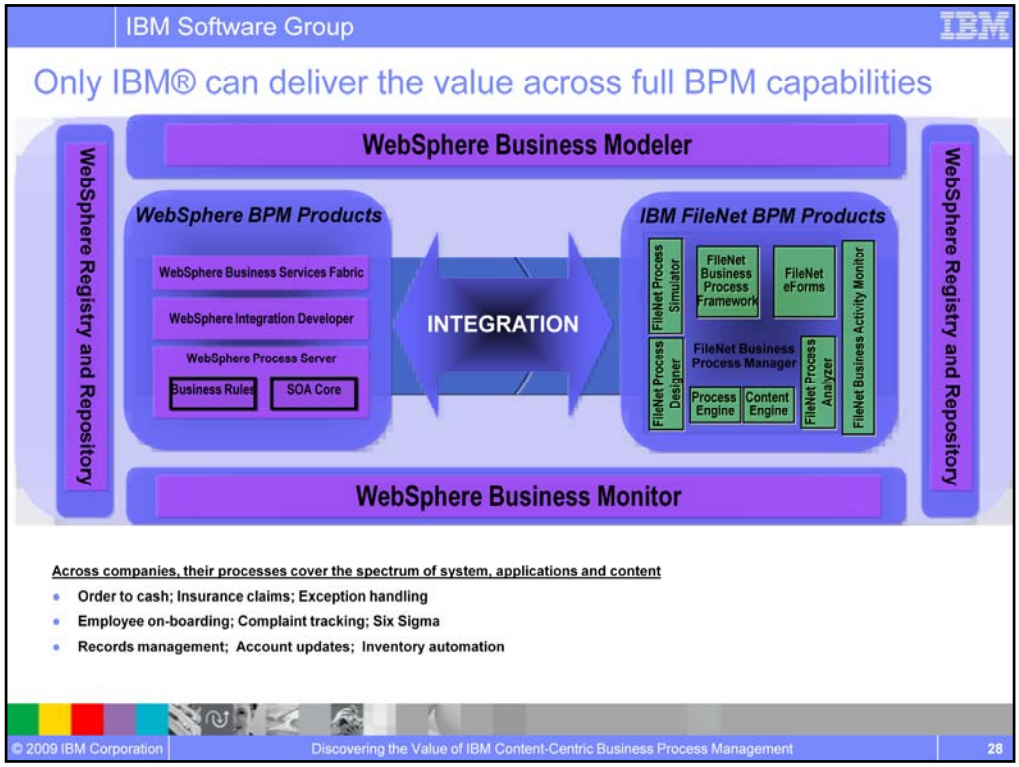
Looking at the functional capabilities that are needed to realize BPM, we have four major categories.

First is the ability to Model a process before going anywhere near implementation. This is achieved through the Modeler for Visio used by the Business Analyst and also the IBM FileNet Process Simulator

Next, we want the tools and capabilities to construct the solution through assembly of available services. This is domain of the IBM FileNet Process Designer and Component Integrator

With a solution ready to run, we need a rich run-time environment to execute the processes. This is where the IBM FileNet Process Engine comes into play.

Finally, we need to determine the qualities of the operational system to determine where we can apply improvements and determine overall business trends and analysis. This functionality is provided by the IBM FileNet Process Analyzer and Business Activity Manager. Real-time management of individual process instances is provided by the IBM FileNet Process Tracker.



Additional Information:

WebSphere

WebSphere Business Modeler (Modeling and Simulation)

WebSphere Business Monitor (Business Activity Monitoring)

WebSphere Integration Developer (Development Tool)

WebSphere Process Server with Built-in Enterprise Service Bus (Process Execution and Deployment Engine)

WebSphere Registry & Repository (Registry and Repository)

FileNet P8 BPM:

Process Engine – PE

Content Engine – CE

Process Designer

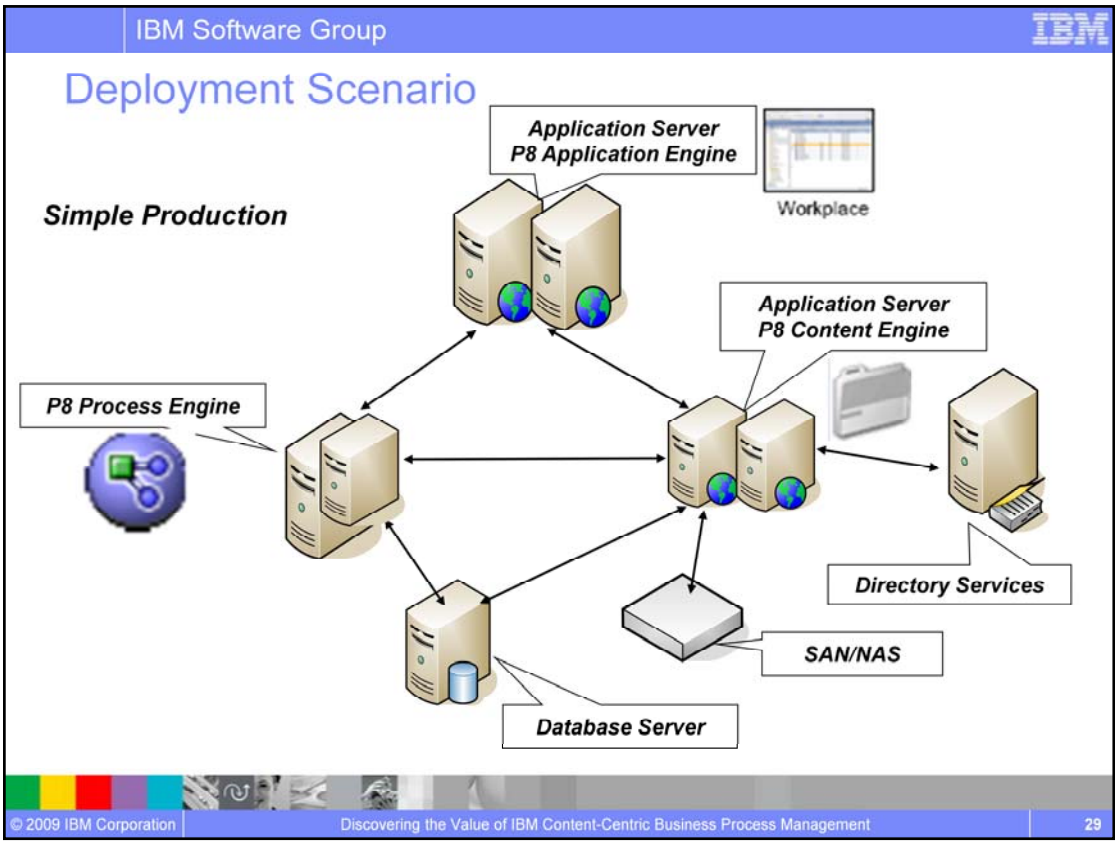
Process Simulator

Process Analyzer

BAM – Business Activity Monitor

P8 eForms

BPF – Business Process Framework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Deployment Scenario
Simple Production
Application Server
P8 Application Engine
Workplace
Application Server
P8 Content Engine
P8 Process Engine
Directory Services
SAN/NAS
Database Server
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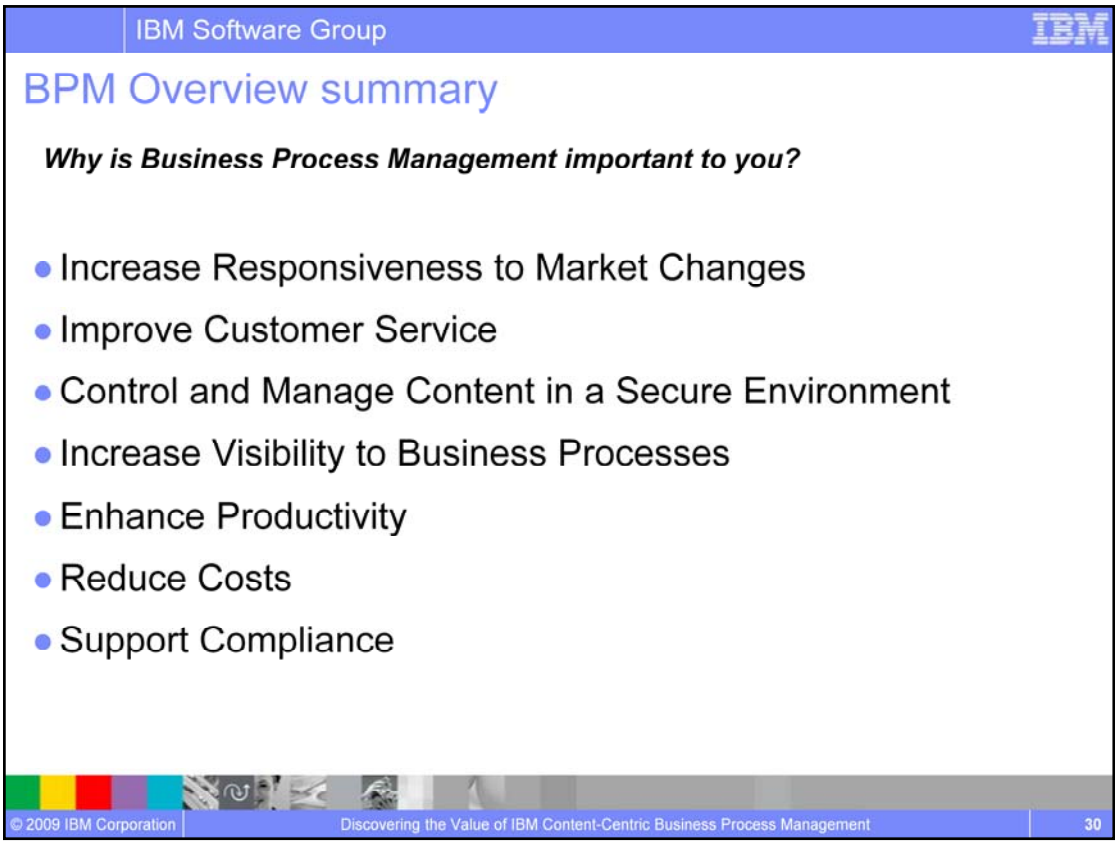


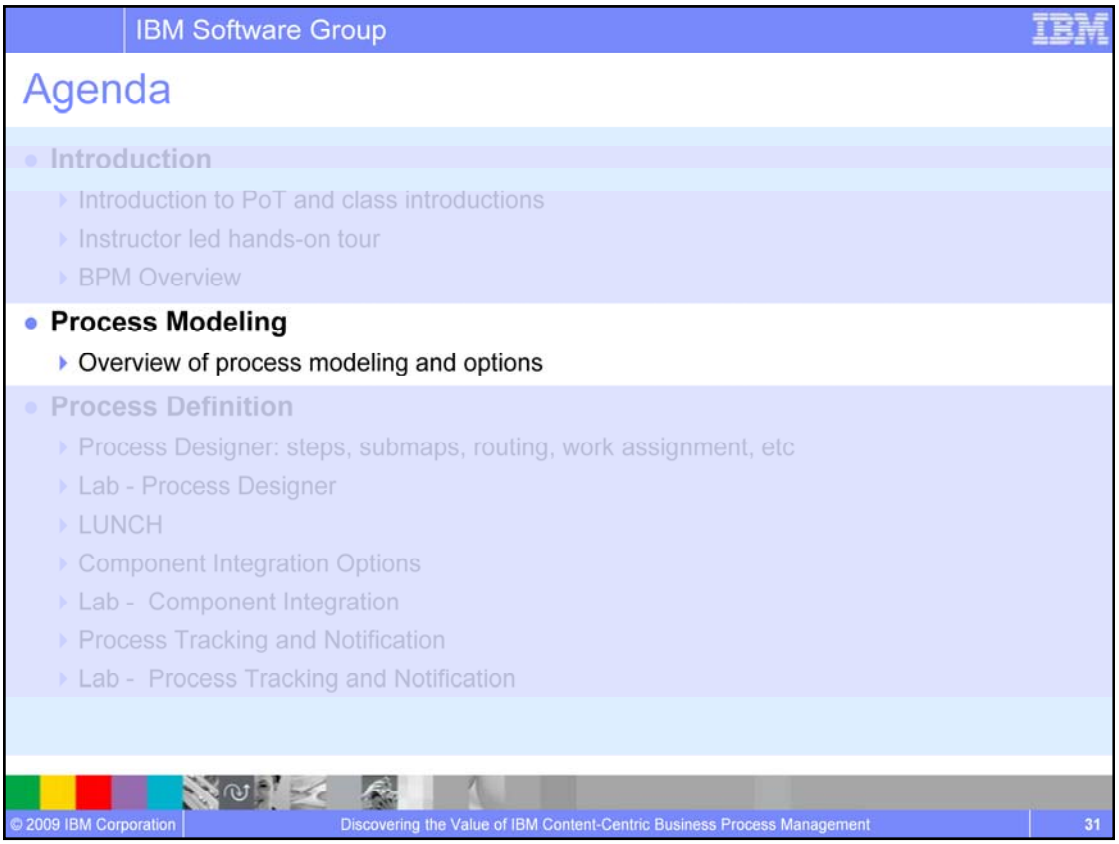
Additional Information:

IBM ECM helps companies make better decisions faster by managing content, optimizing associated business processes and enabling compliance through an integrated information infrastructure

•By enabling companies to integrate content with processes to add value and transform their business

•By streamlining and optimizing complex processes to improve the flow of work throughout the global enterprise

•By delivering an integrated, open platform that can be globally deployed and that provides interoperability with the widest selection of IT systems, thereby reducing costs and improving efficiency

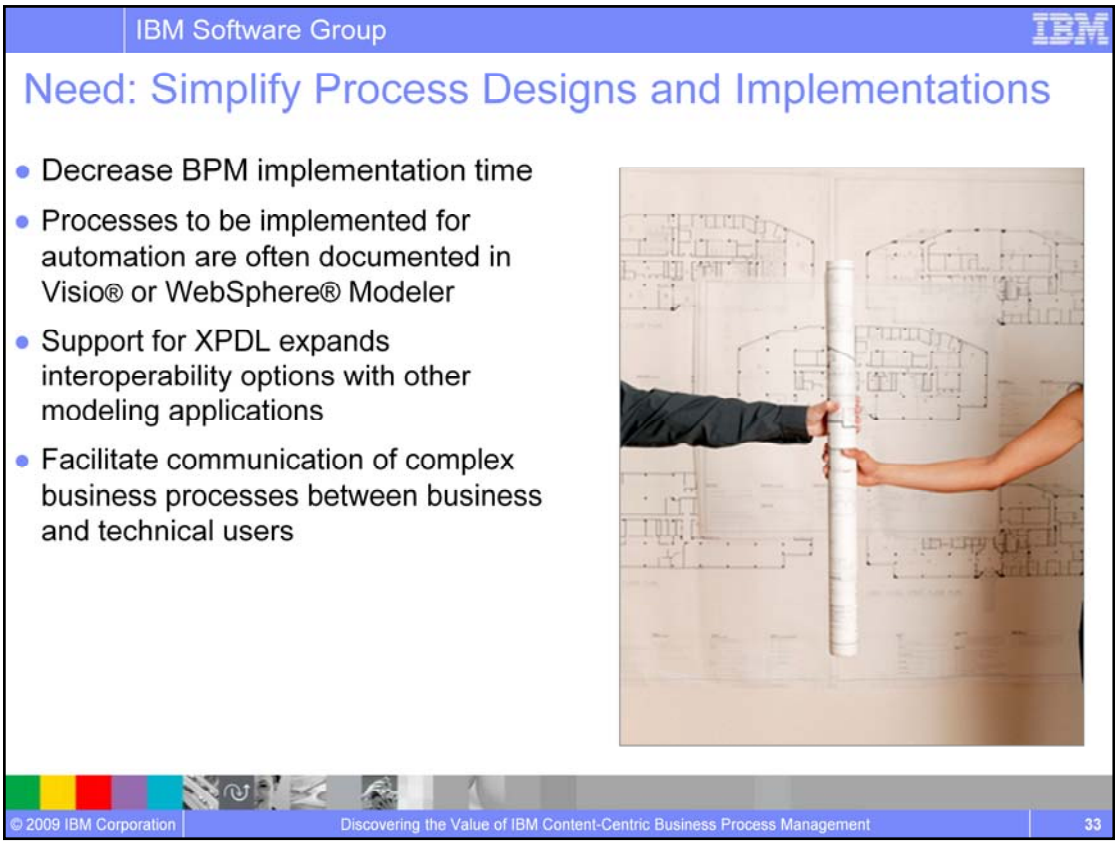


Additional Information:

Let’s begin to explore these capabilities in more detail.

Additional Information:

Diving a little deeper into the functional capabilities that are needed to realize content-centric BPM, the first major category was the ability to Model a process before going anywhere near implementation.



Additional Information:

For customers that require an integrated enterprise business process management solution who want to leverage existing investments and process modeling diagrams in Microsoft Visio to get a head start on BPM implementation. Current Problems:

-Disparate processes, formats, and systems

-Information silos between business and technology users

-Long implementation time from plan, documentation, deployment, test, to execution

XPDL:

•Provides an XML file format that can be used to interchange process models between tools.

•Workflow Management Coalition standard

•Intended as file format for BPMN

BPMN

•an easy to use notation meant to bridge the gap between technical and business users collaborating on the definition of business processes

•Object Management Group.

•Events: start, intermediate, end; timer, cancel, link, multiple

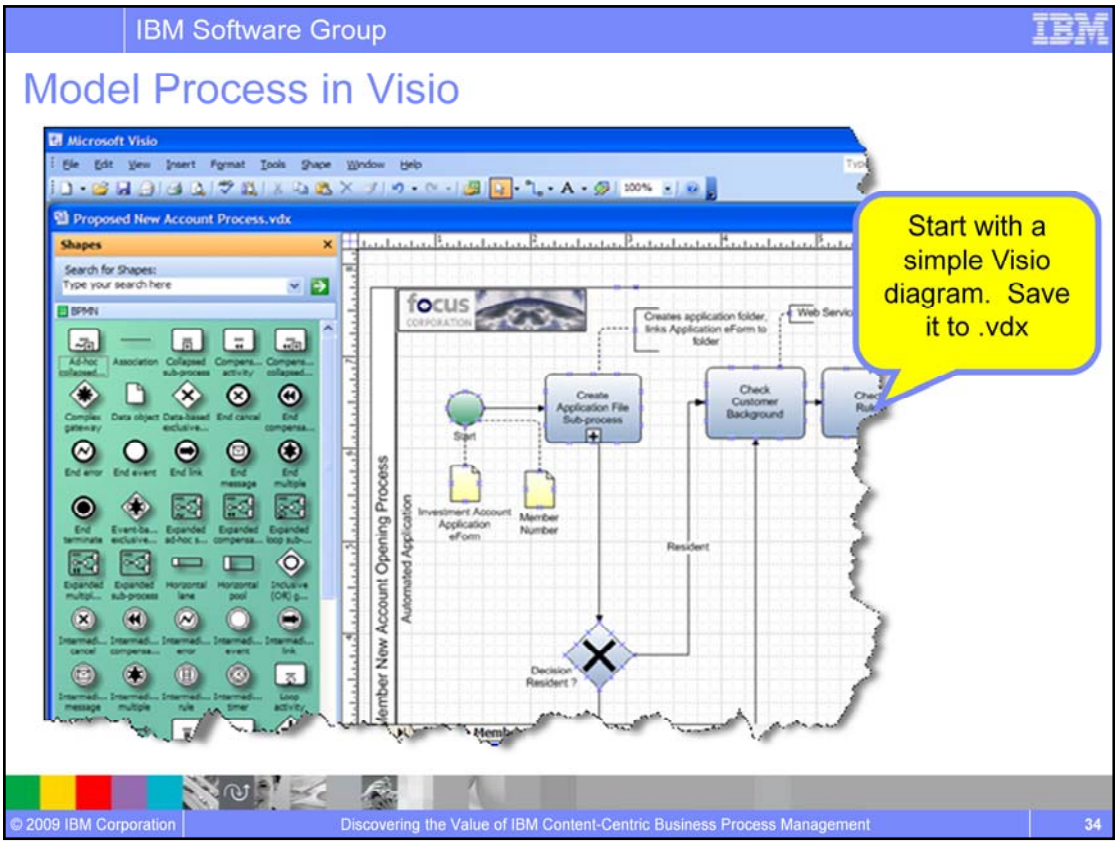
•Activities: task, compensation, sub-processes

•Gateways: event-based, inclusive (OR), parallel/join (AND), complex decisions

•Sequence Flow: order of process steps

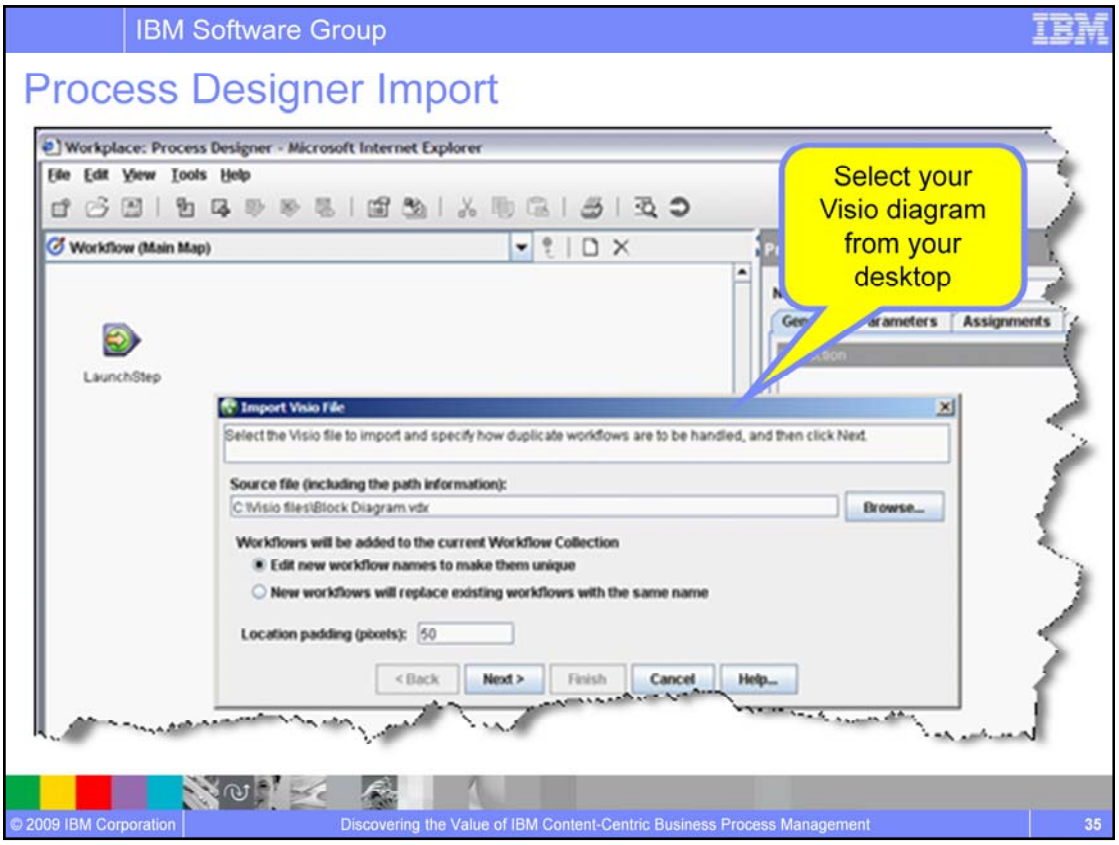
•Message flow: transmission of messages or data between sender & receiver

•Association: for relating artifacts and information with other objects



Additional Information:

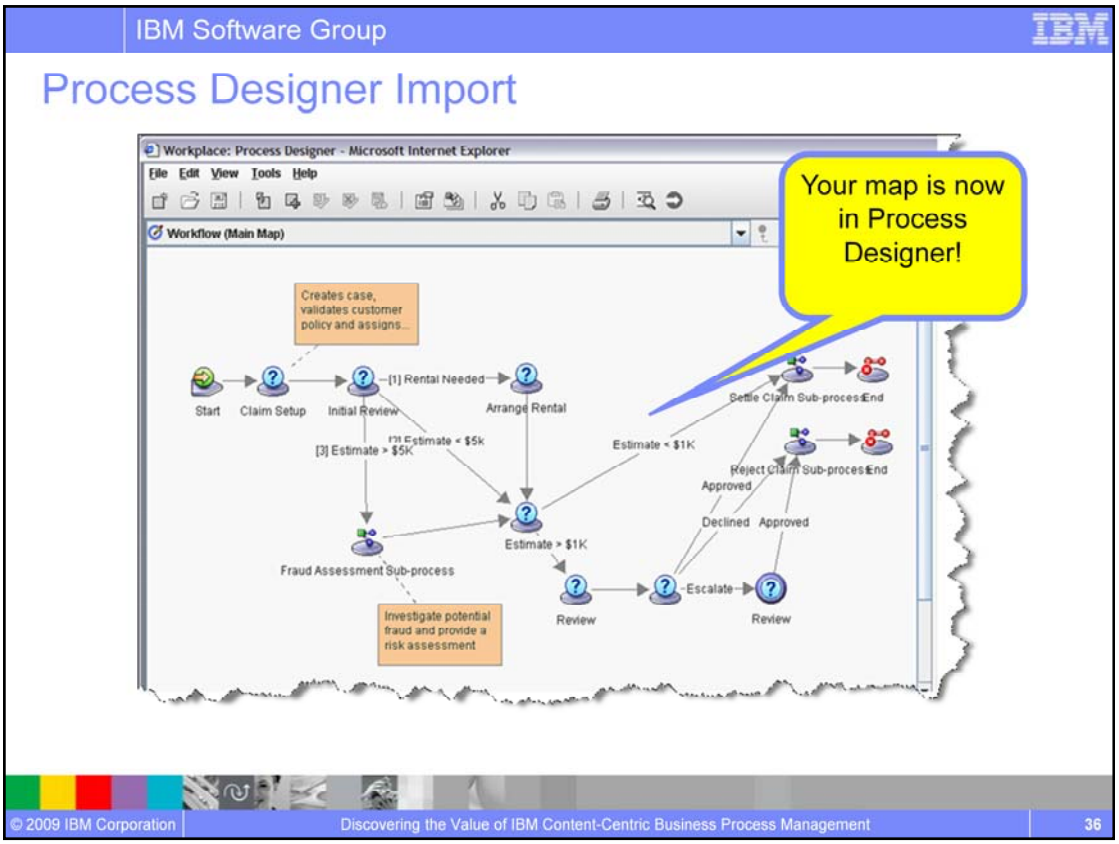
Starting with a simple Basic Flowchart diagram. This is the Focus Financial main application process defined using the **basic flowchart template and stencil.** The process needs to be saved as the **.vdx** version of the process, an **XML** version of the Visio document.



Additional Information:

Choose how workflow name conflicts will be resolved. Screenshot shown is the case of multiple workflows in the existing collection that have the same name.

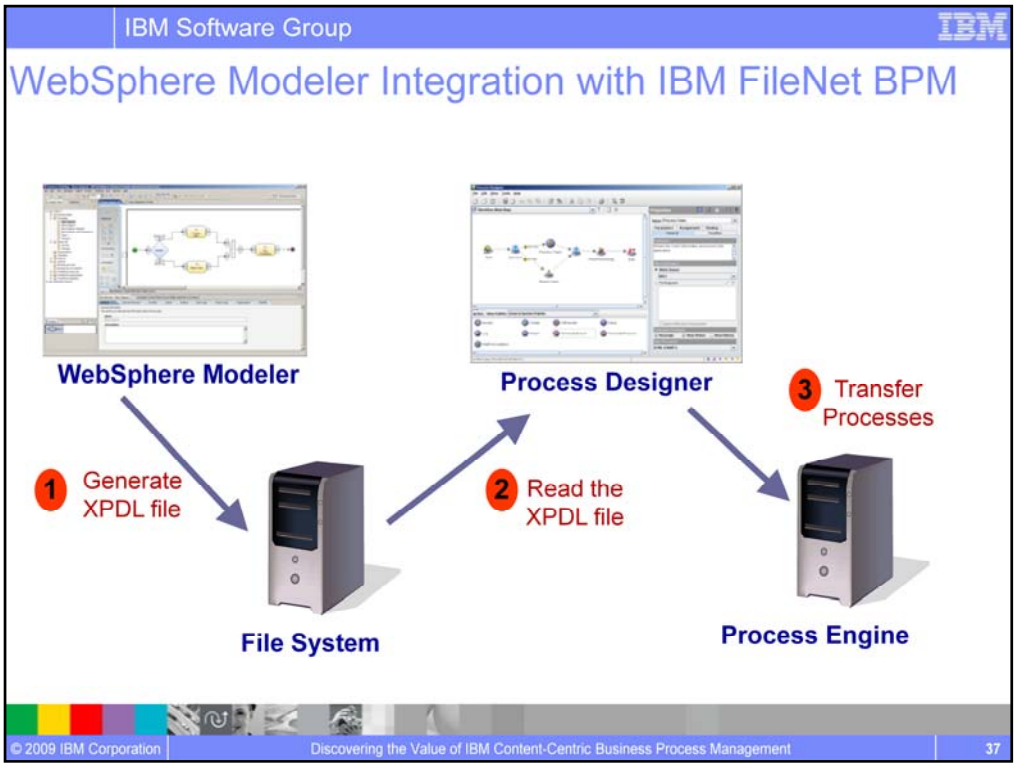
There is also a padding for the destination shapes in Process Designer in case the resulting Process Designer diagram is too cluttered by shapes being too close together.



Additional Information:

Here is the imported process.

Note that the import of annotations is supported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WebSphere Modeler Integration with IBM FileNet BPM
WebSphere Modeler
Process Designer
3 Transfer Processes
1 Generate XPDL file
2 Read the XPDL file
File System
Process Engine
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Lab: Process Modeling

Overview

Introduction	In this lab, you will be introduced to the process modeling capabilities provided by the Connector for Microsoft Visio.
Lab Objectives	• Understand how BPM offers a modeling feature integrated with the world's most pervasive business-user graphical process modeling environment – Microsoft® Visio. • To observe how the Connector for Visio gives a BPMN modeling capability to business analysts, power-users, and IT staff who want to do business process modeling within a familiar user interface in a standards-based, disconnected mode from FileNet BPM execution servers.
Exercises	This lab contains the following exercise:

Exercise	Lab Page
Step-by-Step –Connector for Microsoft Visio	42-51

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Lab Summary

- Comments or questions
- BPM offers a modeling feature integrated with the world's most pervasive business-user graphical process modeling environment – Microsoft Visio.
- The Connector for Visio gives a BPMN modeling capability to business analysts, power-users, and IT staff who want to do business process modeling within a familiar user interface in a standards-based, disconnected mode from FileNet BPM execution servers.

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Process Modeling Summary

- Provides different business process modeling options to decrease implementation time and to reduce deployment cost for BPM customers
  - Import of Visio diagrams into Process Designer
  - Import of WebSphere Modeler process definitions into Process Designer
- Provides XPDL file import into Process Designer and export from Process Designer

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Agenda

- Introduction
  - Introduction to PoT and class introductions
  - Instructor led hands-on tour
  - BPM Overview
- Process Modeling
  - Overview of process modeling and options
- **Process Definition**
  - Process Designer: steps, submaps, routing, work assignment, etc
  - Lab - Process Designer
  - LUNCH
  - Enterprise Application Integration and BPM
  - Lab - Component Integration
  - Process Tracking and Notification
  - Lab - Process Tracking and Notification

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Additional Information:

The second major category of functional capabilities that are needed to realize content-centric BPM is Process Definition - the tools and capabilities to construct the solution through assembly of available services.

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Process Definition Outline

- What is process design?
  - Overview of Process Designer, steps, submaps, routing, work assignment
  - Lab introduction
  - Post-lab summary
    - Business Value
- What is enterprise application integration?
  - Java components, JMS components, Content Engine Operations, Process Orchestration
  - Lab introduction
  - Post-lab summary
    - Business Value
- What is individual process tracking?
  - Process Tracker, Milestones Deadlines, audit log, process administrator
  - Lab introduction
  - Post-lab summary
    - Business Value

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Process Definition

What is Process Design?

- Define your business process with Process Designer

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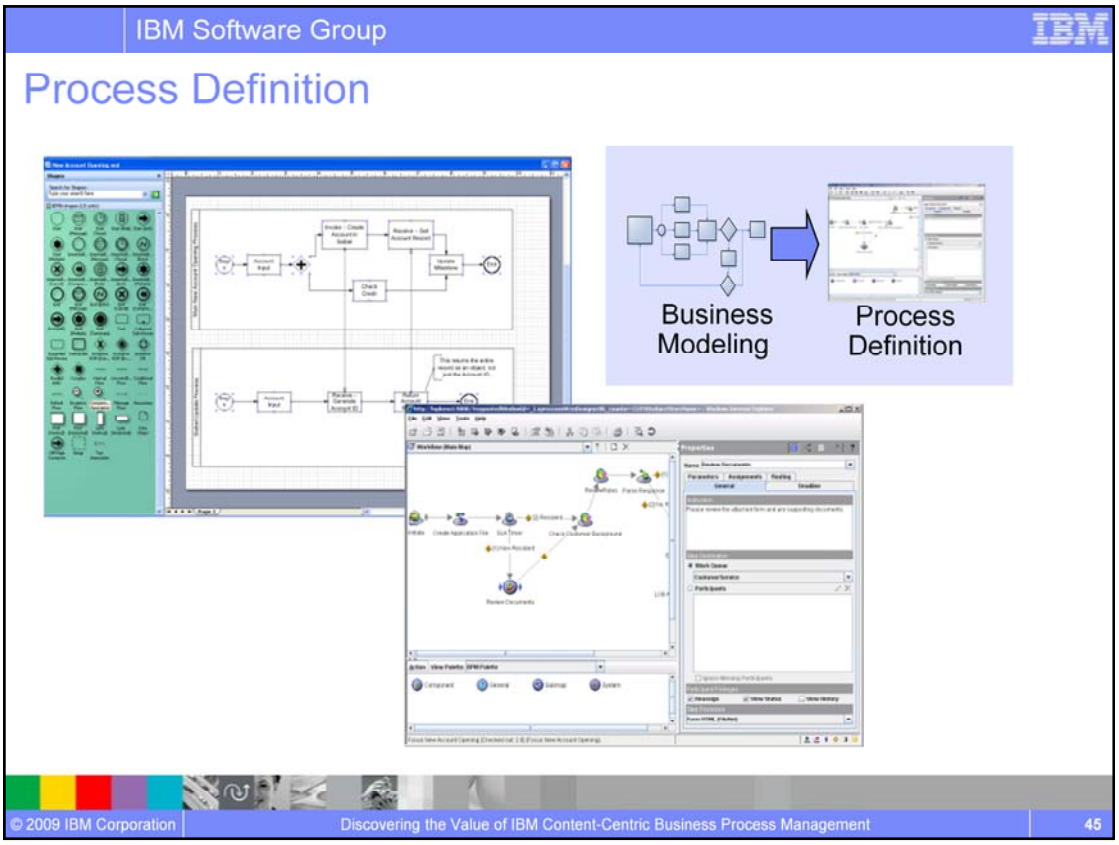
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Process Definition
Business Modeling
Process Definition
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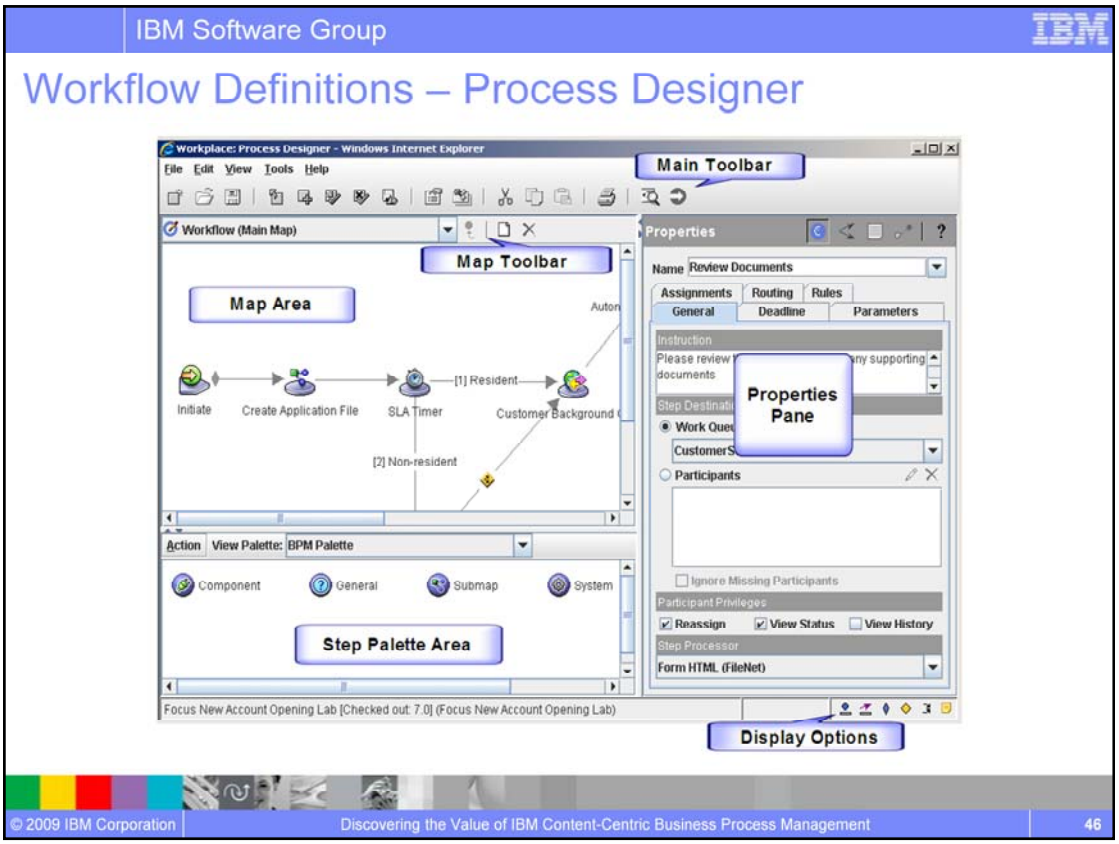
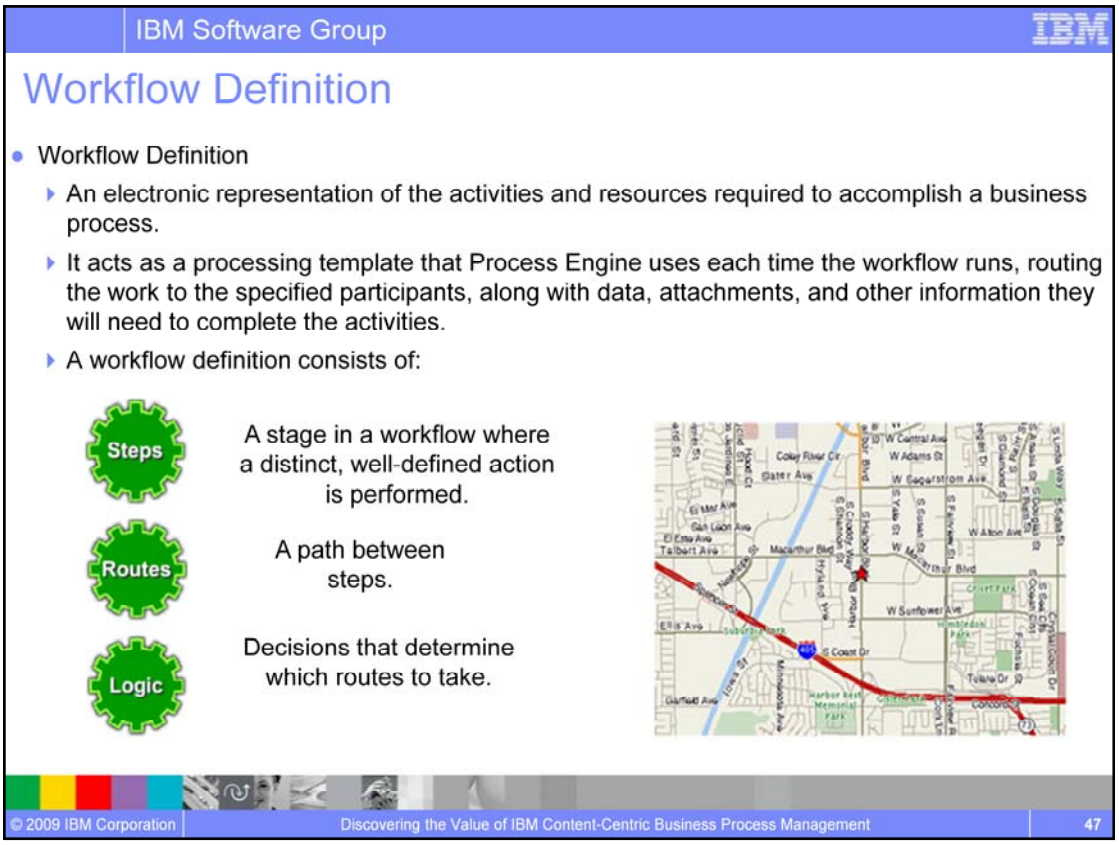


Additional Information:

Use Process Designer to create a workflow definition—a processing template that specifies the steps, resources, and routing logic needed to complete a business process.



Additional Information:

A workflow definition is an electronic representation of the activities required to accomplish a business process. It acts as a processing template for routing the work to the specified participants and automated processes, along with data, attachments, and other information that is required to complete the activities.

<u>A workflow definition consists of</u>:

•A graphical map showing the sequences of steps needed to complete the business process. The steps represent each specific activity or task in the business process.

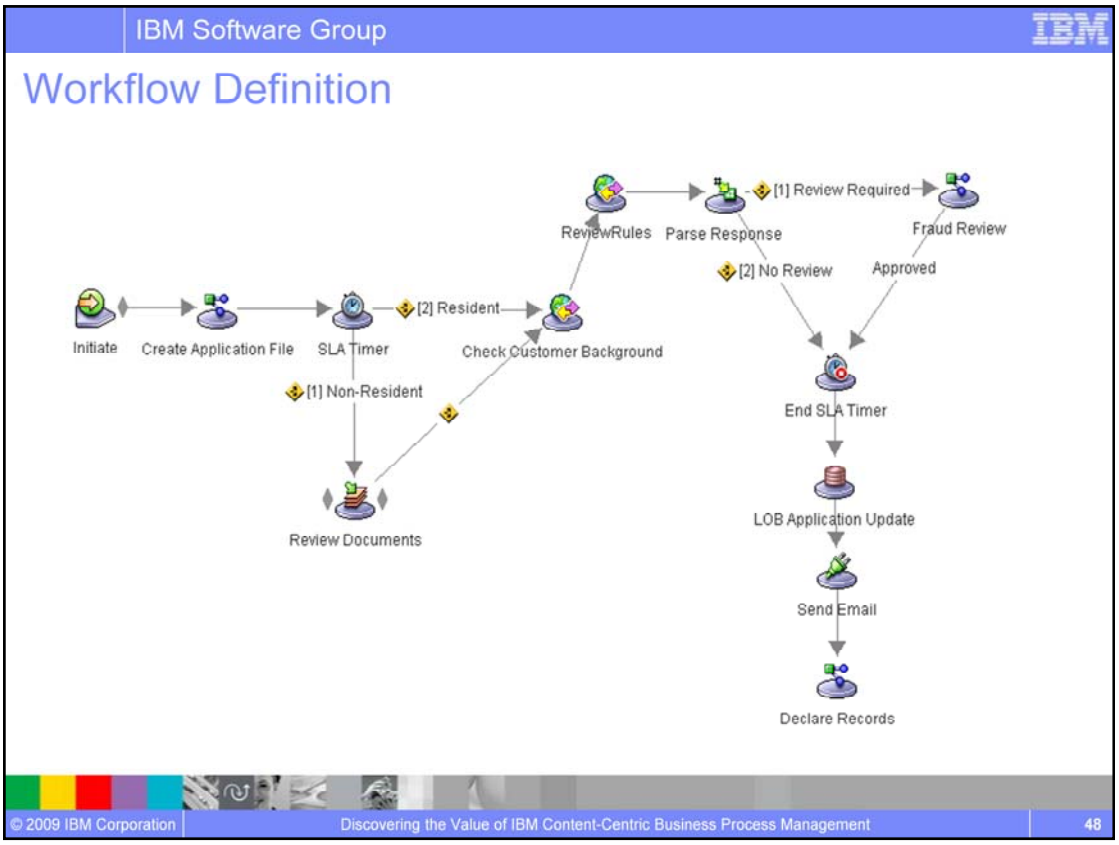
•Specification of each step, including who will process the work for the step, which step processor application the participant will use, which attachments are required, what data is necessary, what responses the participant can choose, and other options.

•Routing logic that specifies how work will advance from one step to the next.

You can think of a workflow in terms of travel. Imagine taking a trip to some place. Before you leave, you look at a roadmap. The map shows the routes you need to take, and you can use the same map as often as you like for different trips. The map has intersections, and each time you travel, you may choose a different route.

In this case, a ***workflow definition*** is the map. It is reusable and has all of the possible routes you can take shown graphically.

A ***workflow*** is the individual trip. It is an instance of using the map. Each time you get in the car and depart, you use the same map, but for each trip you can also choose which way to go. Just as in a workflow, the decision to take a route is based on the circumstances of that individual trip.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Workflow Definition
Initiate
Create Application File
SLA Timer
[2] Resident
[1] Non-Resident
Check Customer Background
ReviewRules
Parse Response
[1] Review Required
Fraud Review
[2] No Review
Approved
Review Documents
End SLA Timer
LOB Application Update
Send Email
Declare Records
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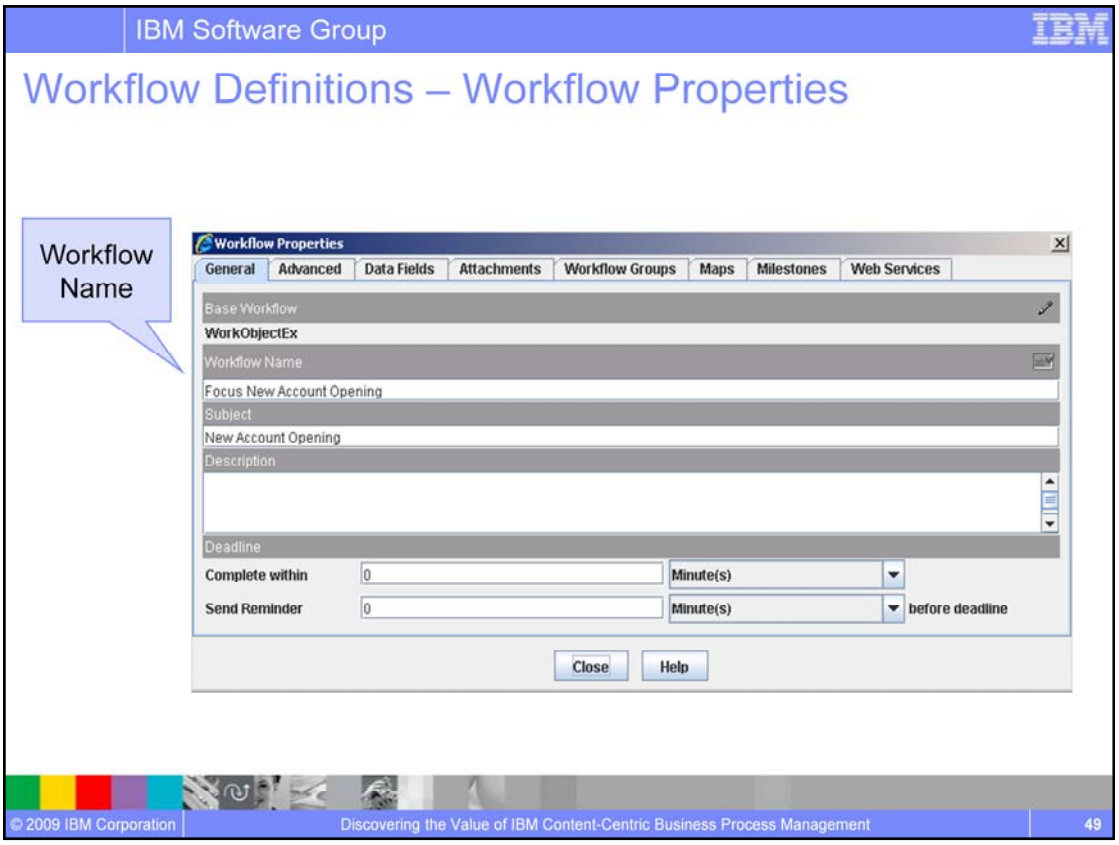

Additional Information:

In the Workflow Properties dialog box, you specify the general properties of the workflow, such as the name and subject, the data fields, attachments, workflow groups, and milestones you will use for any steps in the workflow, and any submaps.

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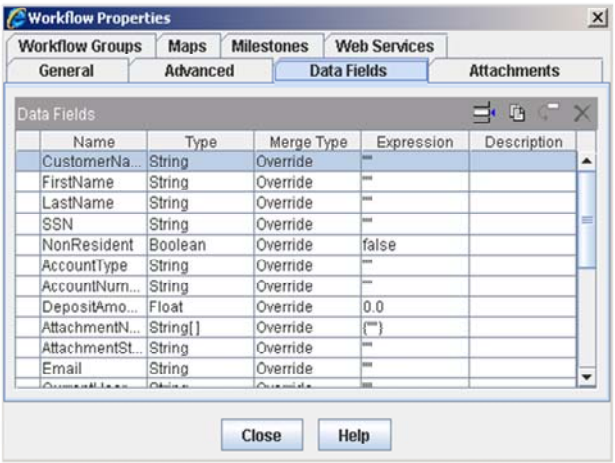
Data Fields

- Data fields are defined to hold values that will be used by a participant or automated process step, and as values for conditional decisions.
- A data field definition includes a name, data type, and an initial value.



Name	Type	Merge Type	Expression	Description
CustomerNa...	String	Override	""	
FirstName	String	Override	""	
LastName	String	Override	""	
SSN	String	Override	""	
NonResident	Boolean	Override	false	
AccountType	String	Override	""	
AccountNum...	String	Override	""	
DepositAmo...	Float	Override	0.0	
AttachmentN...	String[]	Override	{""}	
AttachmentSt...	String	Override	""	
Email	String	Override	""	

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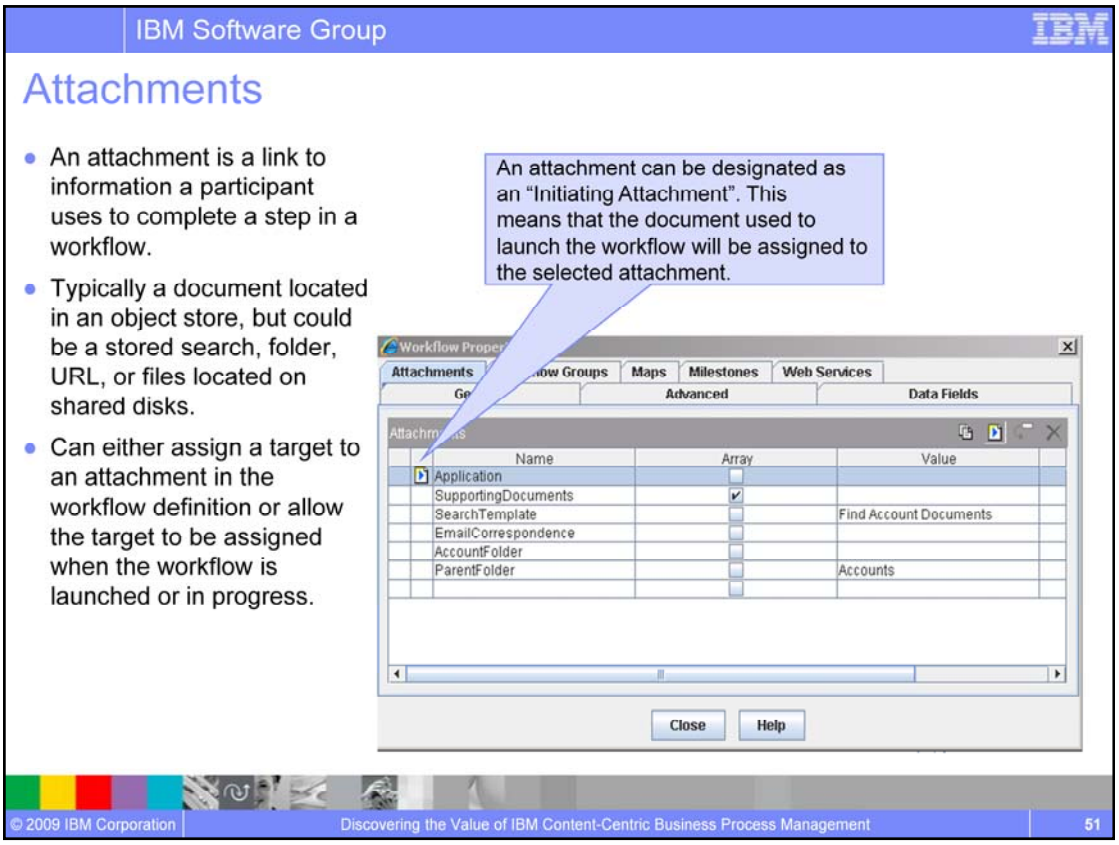
Additional Information:

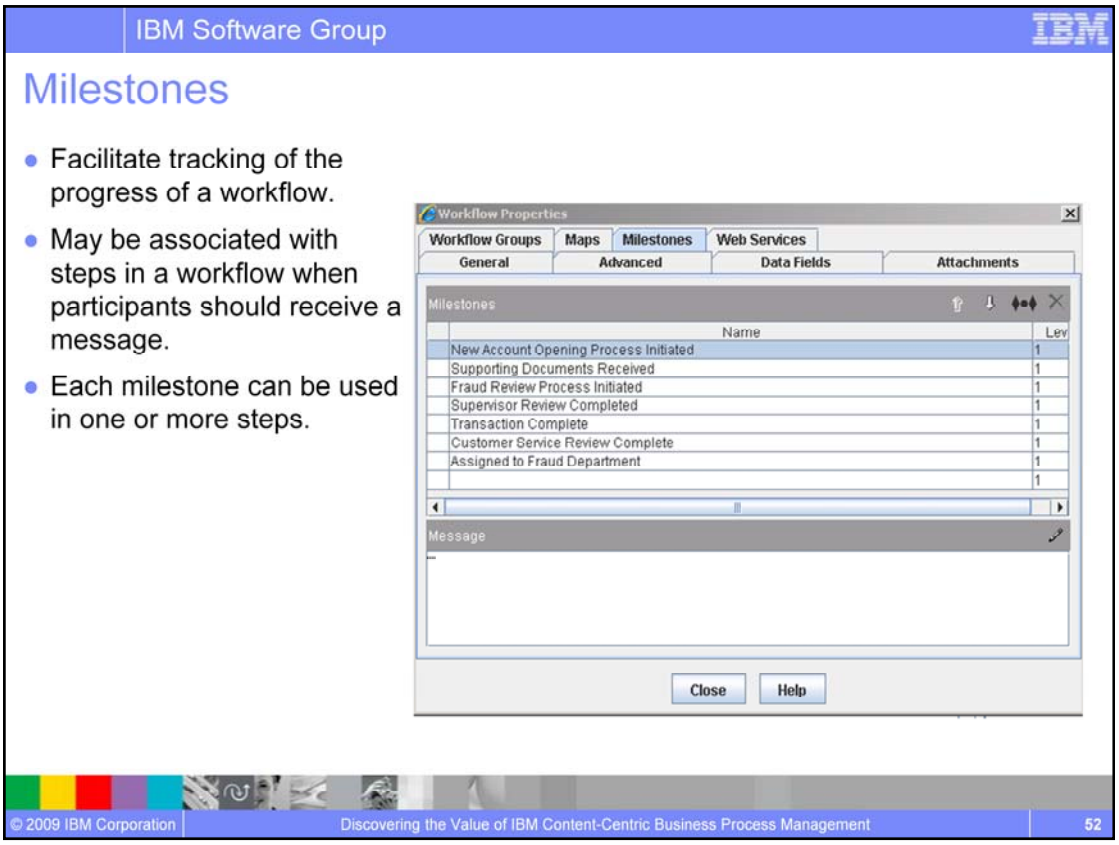
In the Workflow Properties dialog box, define all data fields that will be used in any step in the workflow. When you subsequently define each step, you indicate which data fields are parameters for that step, and what access the user will have to modify the values.

The workflow author defines data fields to hold values that will be used by a participant or automated process at a step, and as values for conditional tests or decisions. A data field definition includes a name, data type, and an initial value. The workflow author, workflow administrator, and application developer typically work together to determine what fields are needed and how they will be used.



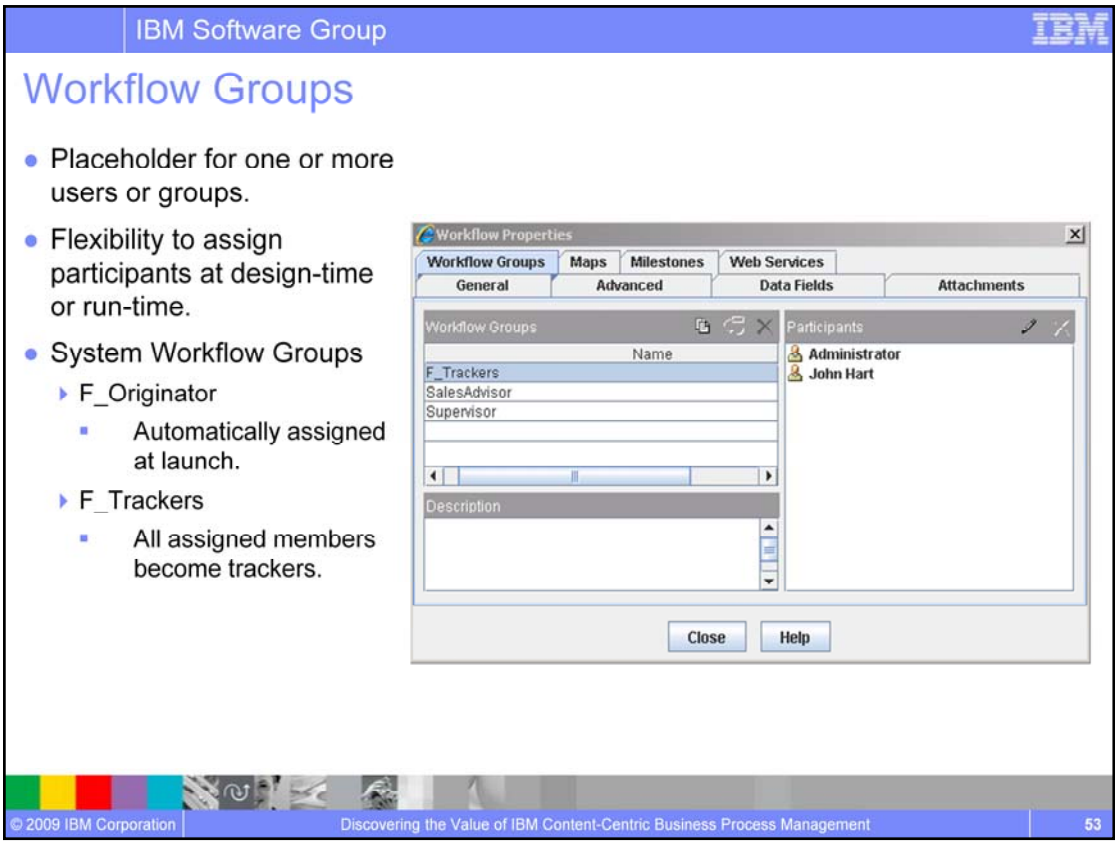
Additional Information:

An attachment links to information a participant will use to complete a step, such as a document or a URL. Define attachments as part of the workflow definition, then indicate which attachments will be used at each step.



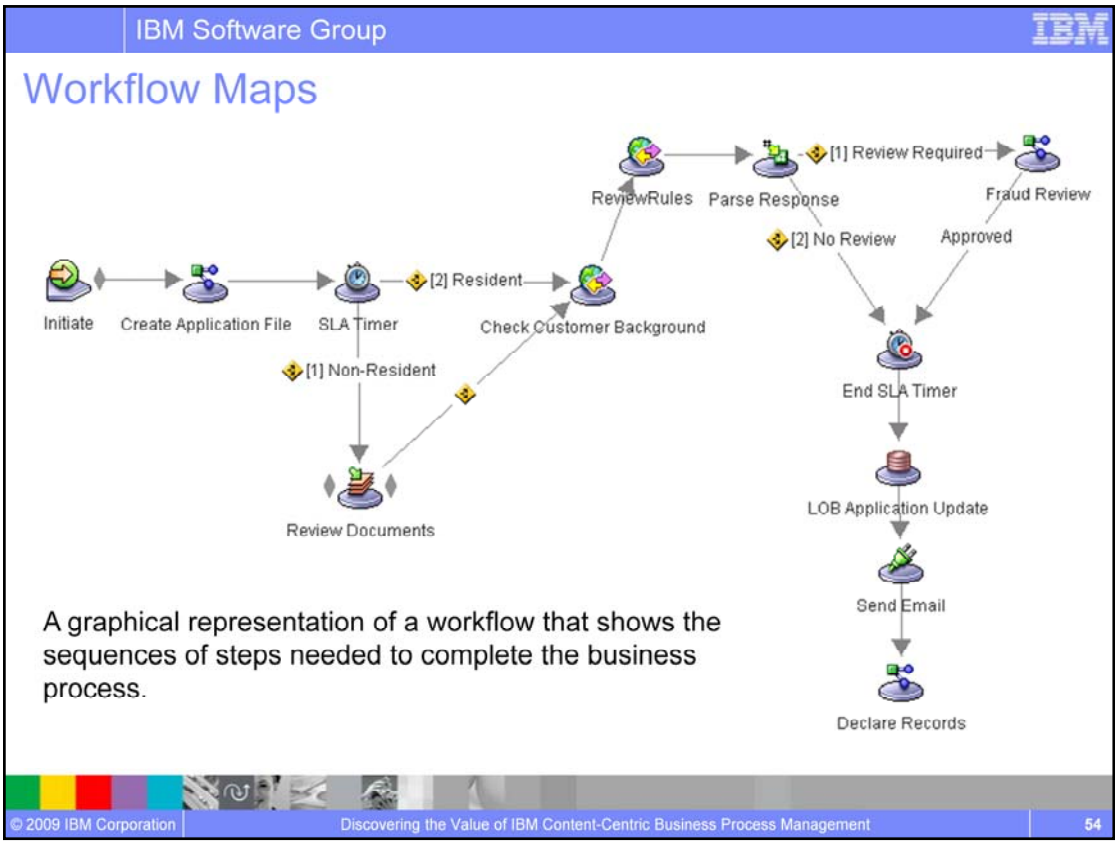
Additional Information:

To track the progress of a workflow, the workflow author can define key points (milestones) in the workflow. On the workflow map, a milestone can be placed either before or after a General step, or after the Launch step. When the running workflow reaches a milestone, an author-specified message is written to a log file and, depending on its author-specified level (1 to 99), the milestone displays for workflow participants, trackers, and the user who launched the workflow.



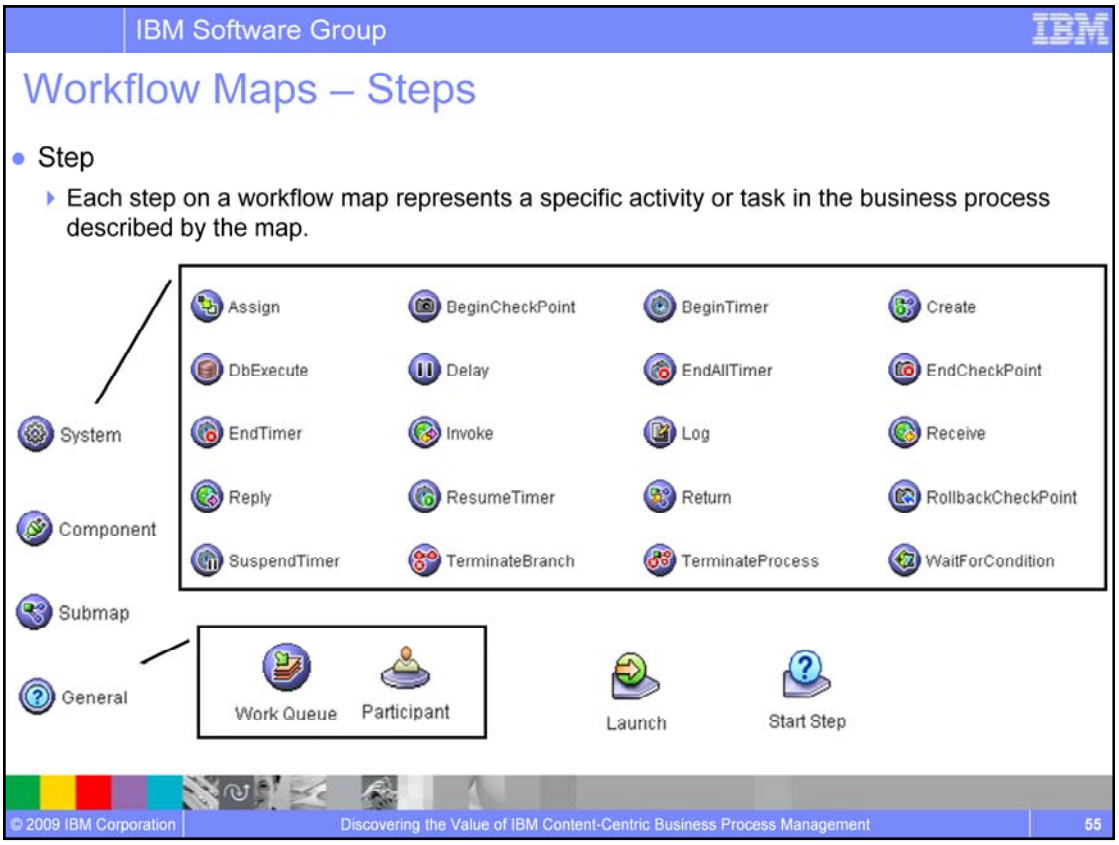
Additional Information:

For flexibility in defining a workflow, the author can either assign one or more specific participants to a workflow group, or allow the participants to be assigned later, either as part of the launch process or at a particular step when the workflow is running. This technique of including unspecified workflow groups in the workflow definition is useful when the participant for a step is likely to change each time the workflow runs. For example, in a Travel Authorization workflow with a Supervisor Approval step, the actual supervisor could be different each time the workflow runs. In the workflow definition, the workflow author creates a workflow group named Supervisor, and assigns Supervisor as the participant for the Travel Approval step. Each user who submits the travel request and launches the workflow indicates which user (his supervisor) is assigned to the workflow group named Supervisor.



Additional Information:

A graphical representation of a workflow that shows the sequences of steps needed to complete the business process. A step represents a specific activity; routes between the steps indicate one or more possible processing paths



Additional Information:

A step is a stage in a workflow where a distinct, well-defined kind of work is performed. Each step on a workflow map represents a specific activity or task in the business process you are defining.

In defining a workflow, you drag a step of the appropriate type from a step palette, and position the step wherever you like on a workflow map.

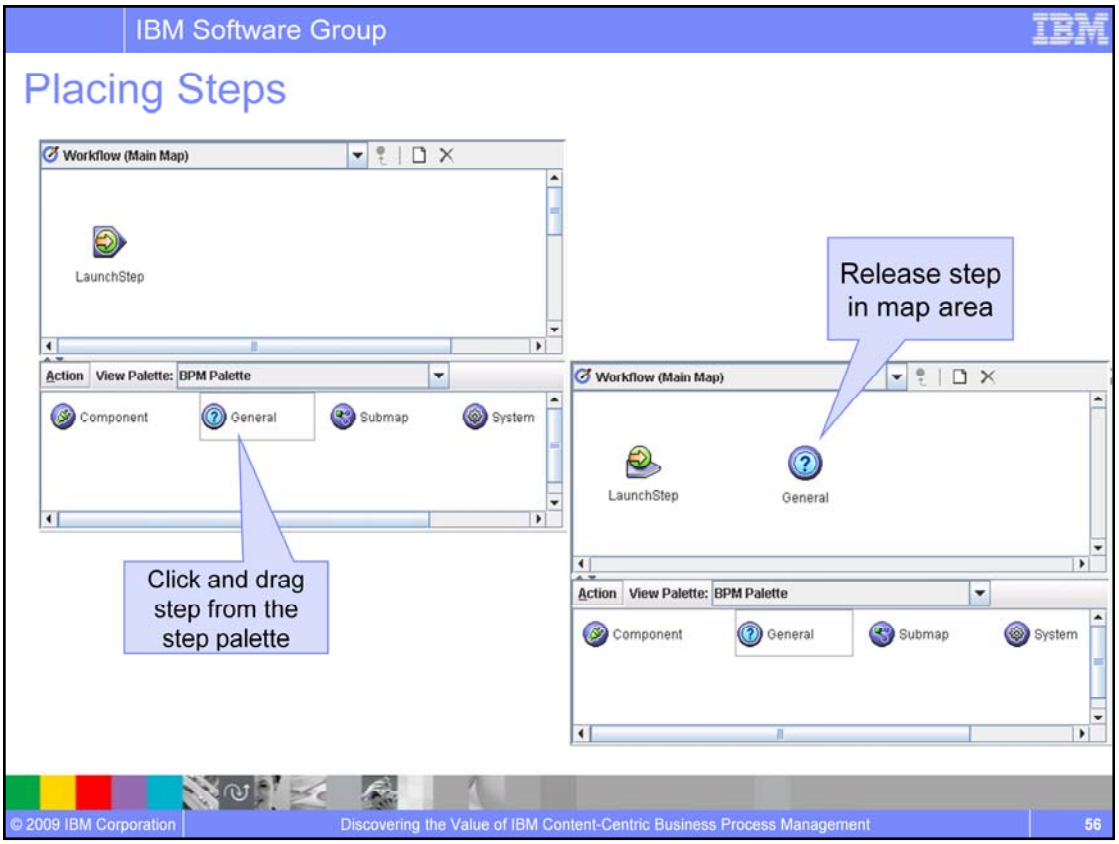
The BPM palette contains basic steps you can use for most workflows.

•General Step - for general workflow activities that will be processed by a participant or sent to a work queue for processing by one of a pool of participants or by an automated process.

•Submap Step - to call another workflow map in the current workflow definition. .

•System Step - to specify one or more built-in system functions that perform logic-control and other functionality in the workflow, such as setting time limits for specific activities in the workflow.

•Component Step - to execute operations in an external program as part of the workflow.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Placing Steps
Workflow (Main Map)
LaunchStep
Action
View Palette: BPM Palette
Component
General
Submap
System
Click and drag step from the step palette
Release step in map area
Workflow (Main Map)
LaunchStep
General
Action
View Palette: BPM Palette
Component
General
Submap
System
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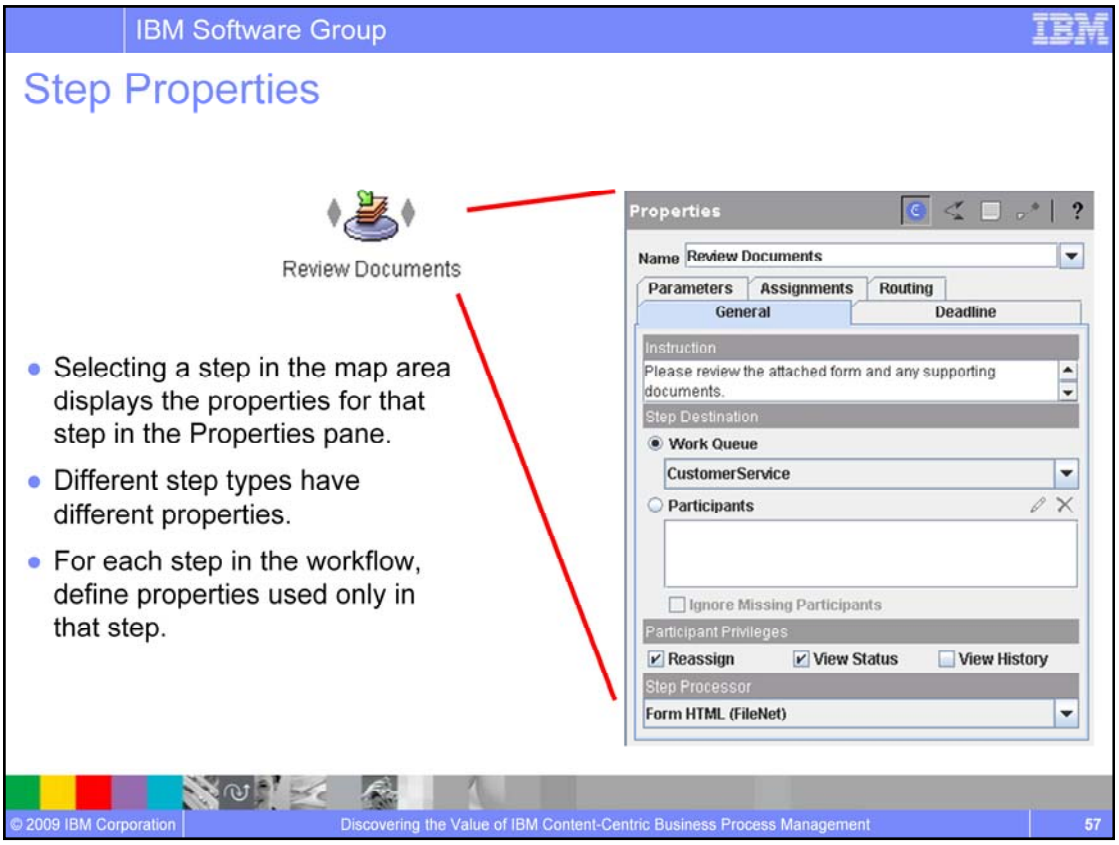


Additional Information:

For each step in the workflow, specify the properties that are appropriate for that type of step-launch step, general step, system step, submap step, or component step.

For example:

General step properties:

General: Participant instructions, step destination (work queue or participant), participant privileges, step deadline, step processor.

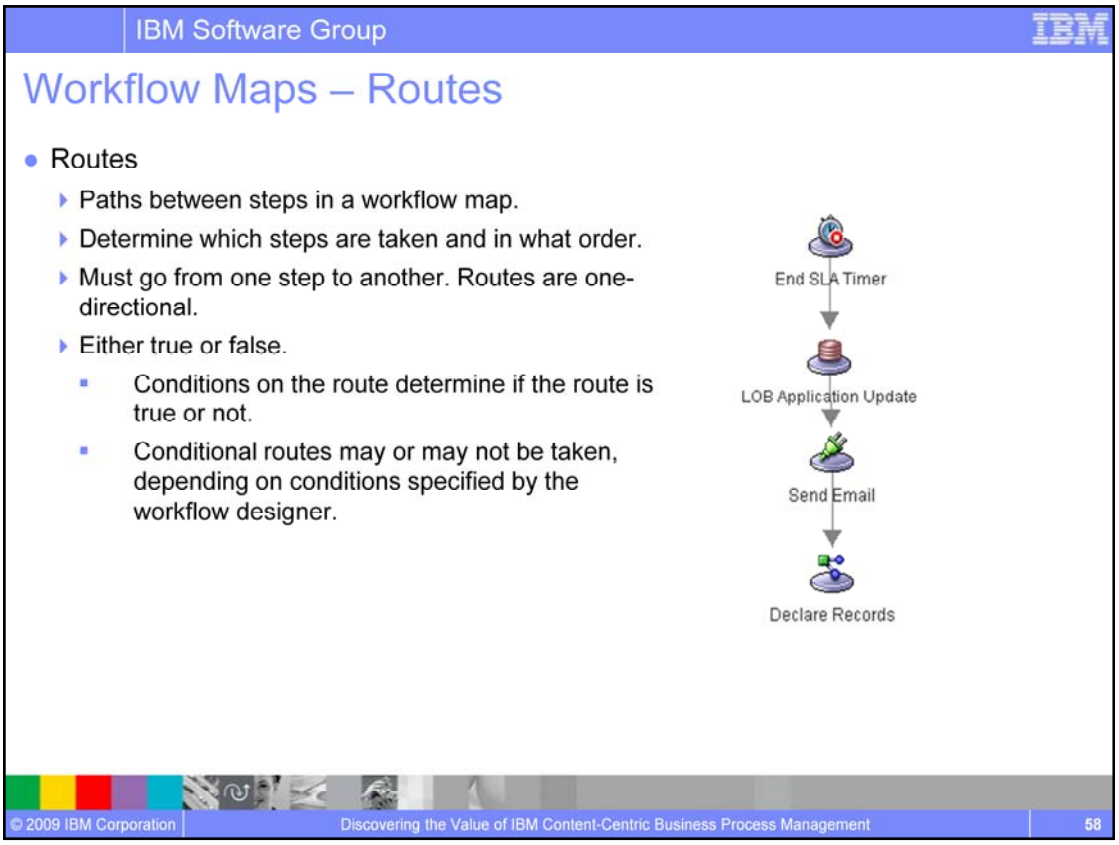
Deadline: Time limit for completing the step, an optional reminder, and a submap to be executed if the time limit expires.

Parameters: Data fields, attachments, workflow groups to use as parameters.

Assignments: Attributes, field assignments, and milestones for the current step. (Assignments and milestones are before execution or after completion.)

Routing: Responses and outgoing routing.

Rules: Rule sets to be run before execution, on save, or after completion of the step.



Additional Information:

To specify how work will progress from one step to the next, you define routes between the steps in a workflow definition. With the exception of the last step on the map, every step has one or more routes leading from it.

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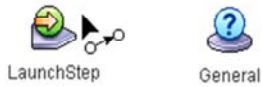
Drawing Routes



1. Point the cursor to the edge of the step until the route symbol displays on the cursor.

2. Press the left mouse button and drag onto the end step; then release the button.

3. The newly created route displays as a red arrow from the origin step to the destination step

- Routes determine how work is routed between steps.
- To create a route between two steps, you draw the route directly in the map

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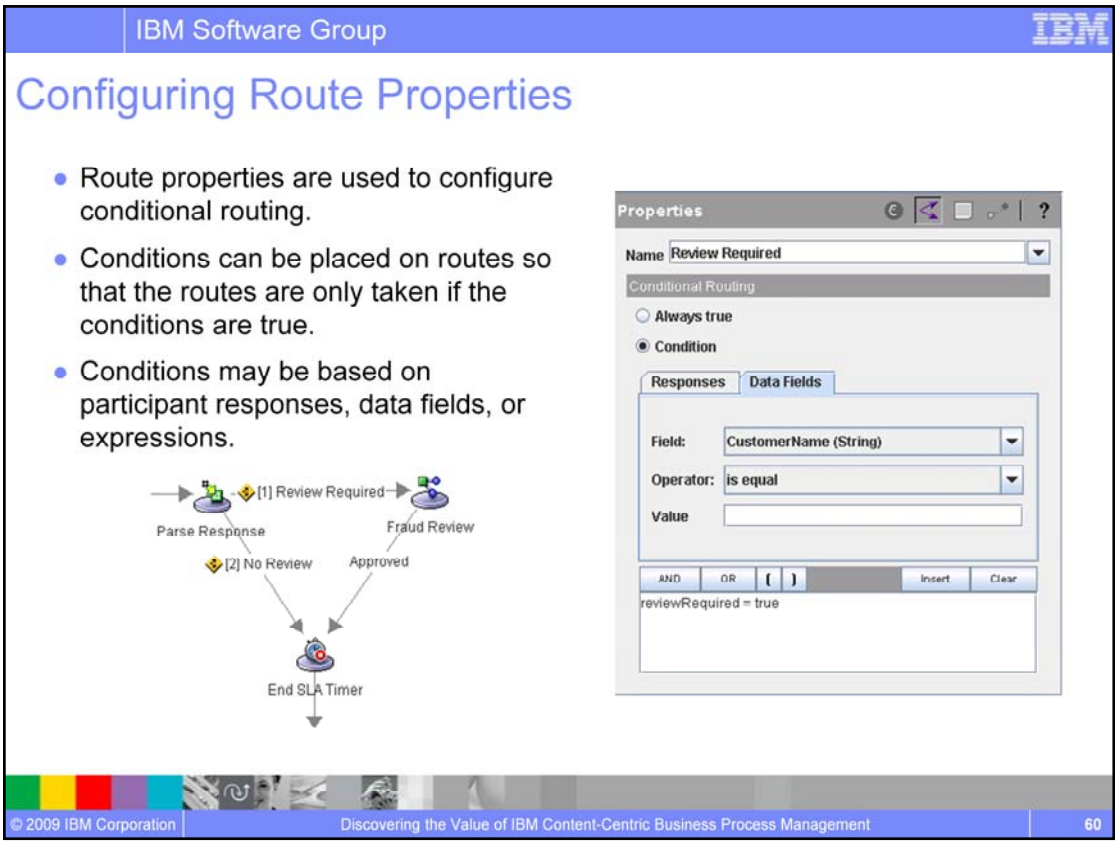
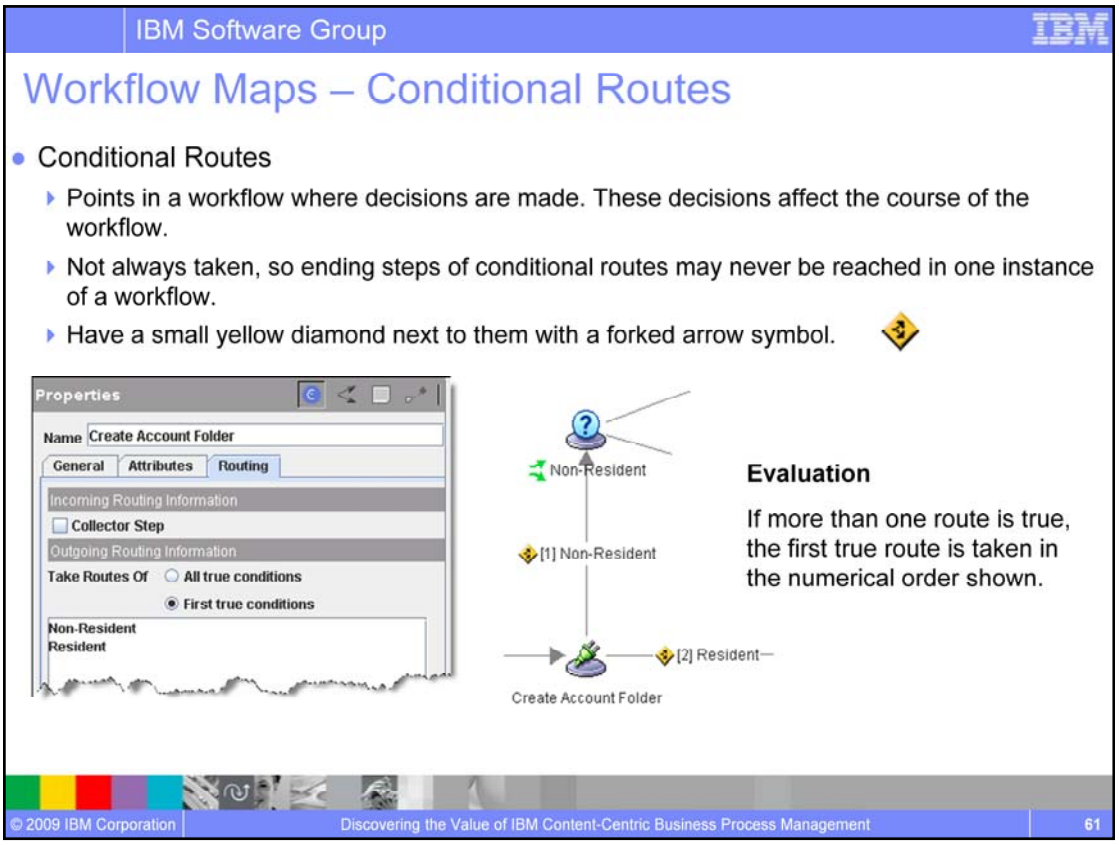


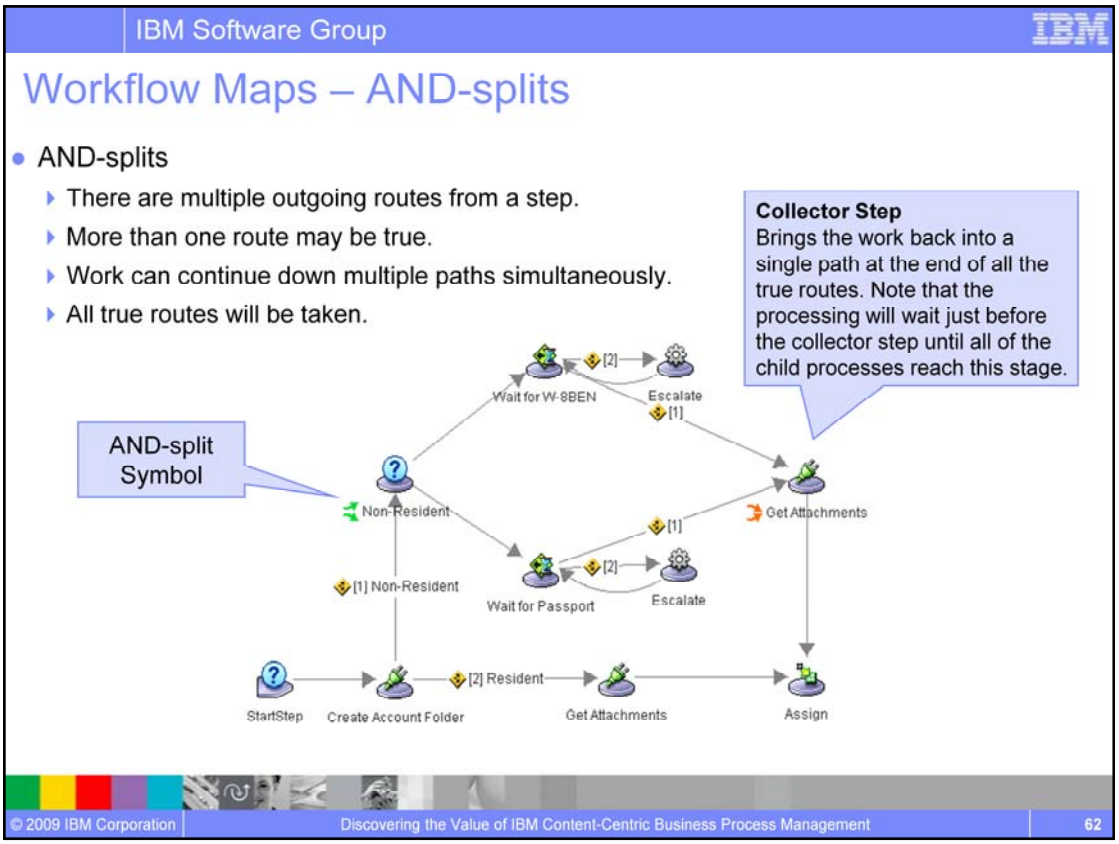
Additional Information:

For each route, you specify a name and indicate whether the route is "always true" or has conditions.



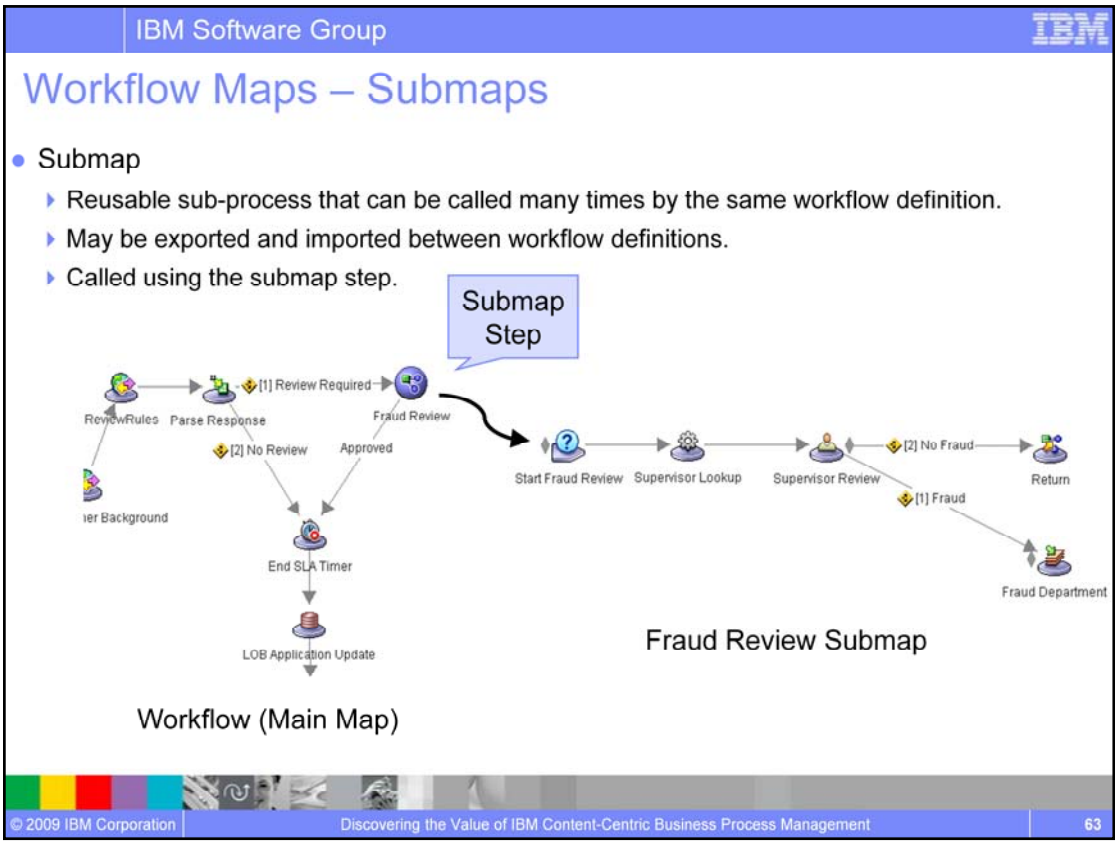
Additional Information:

Most workflows require branching at various points, either as the result of a response made by a participant, or based on the value of one or more fields in the workflow.



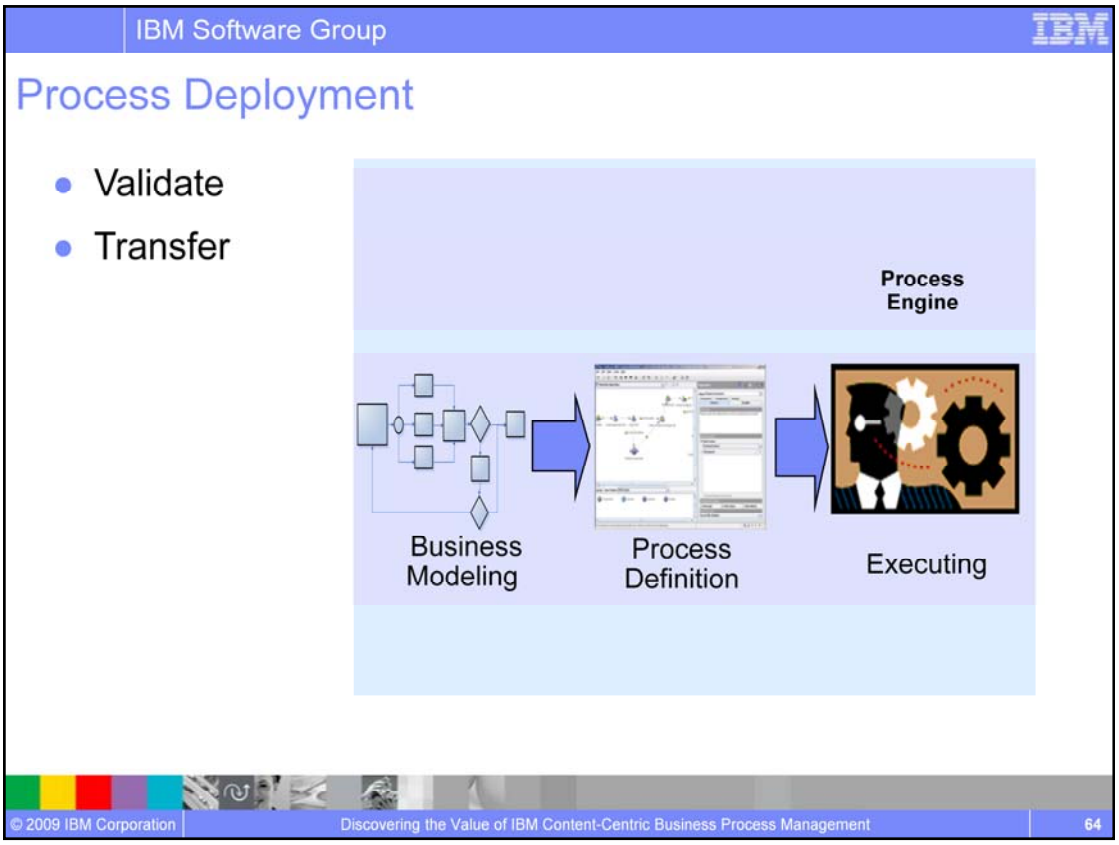
Additional Information:

For some applications, it is desirable to specify simultaneous processing (an AND-split), but it might be inconvenient to wait for all the child processes to reach the collector step in order for processing to continue.



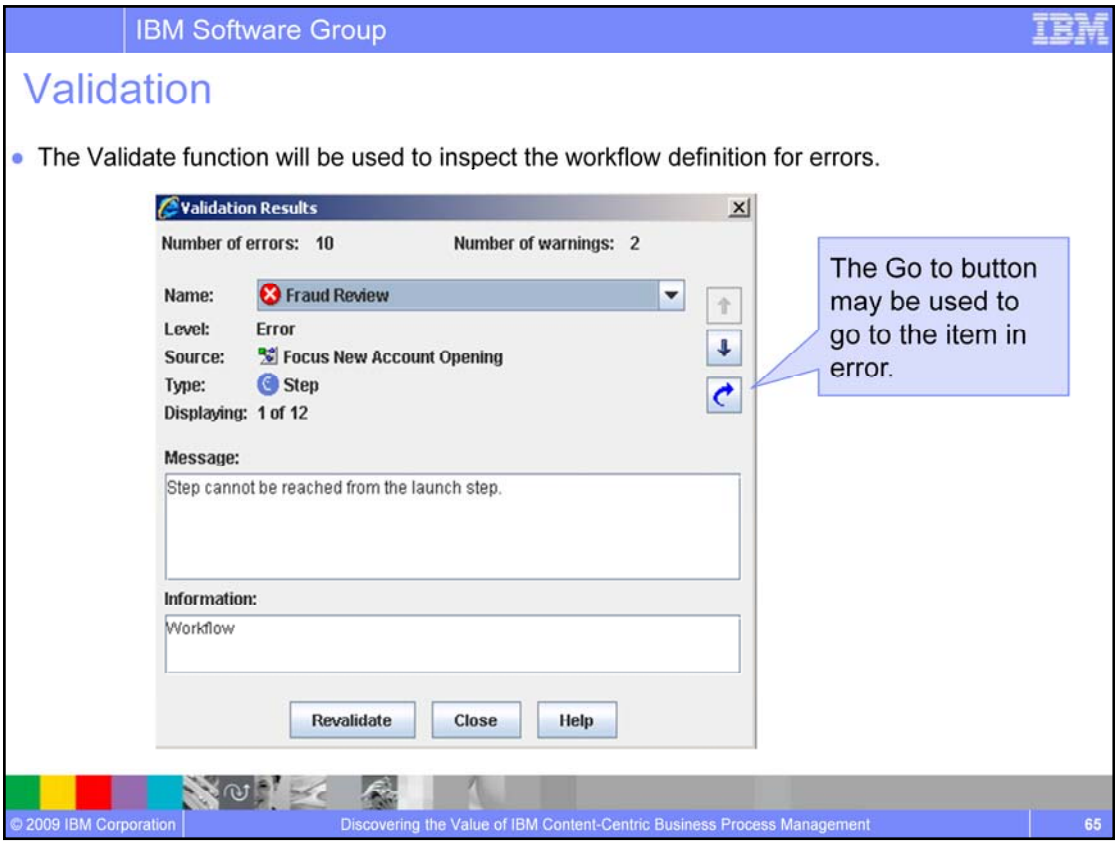
Additional Information:

A submap step represents a call to another map in the workflow definition. When the running workflow reaches a submap step, the processing continues with the steps on the called submap. When the processing of the submap is complete, control returns to the calling step for any routing conditions.



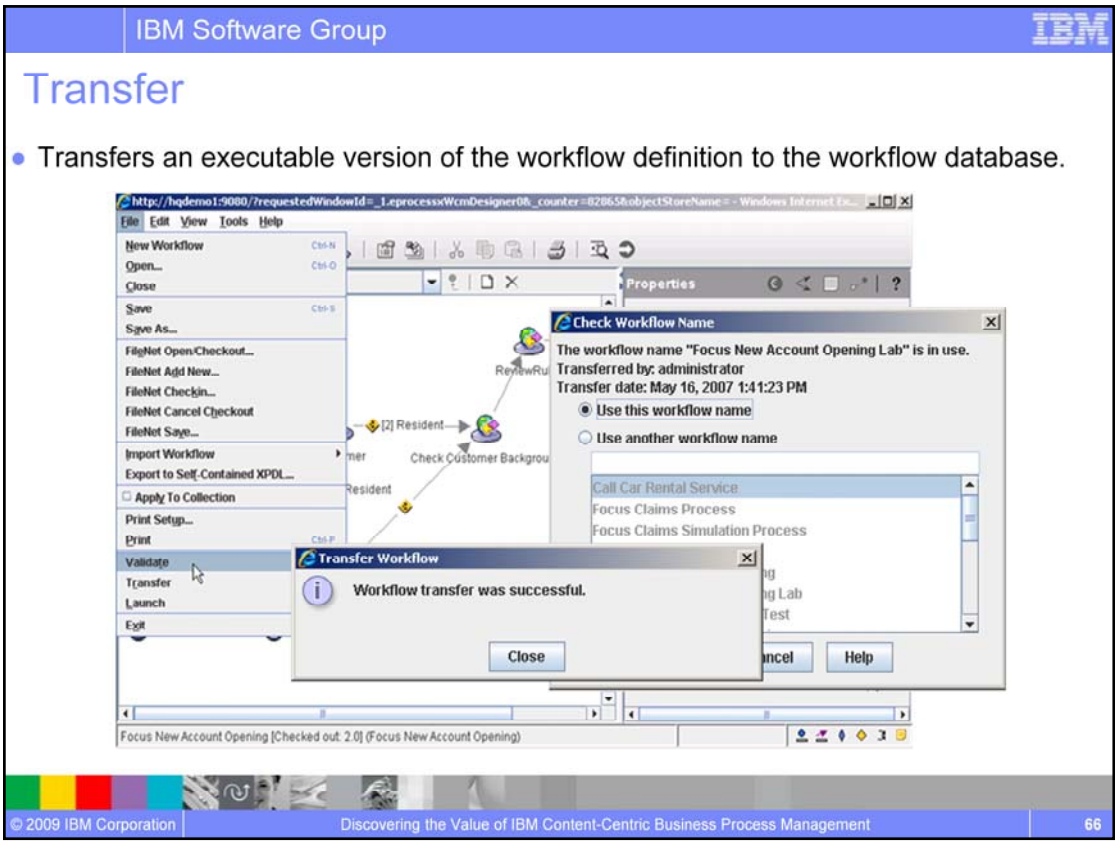
Additional Information:

Process Designer provides tools for validating and testing a workflow definition before you make it available for general use. The Validate tool checks the workflow definition for errors, such as missing workflow name, and invalid expressions and routing conditions. The Transfer tool transfers the workflow definition to the Process Engine and converts it to an executable form. The Process Engine provides the operational execution – the third major functional capability needed to realize content-centric BPM.



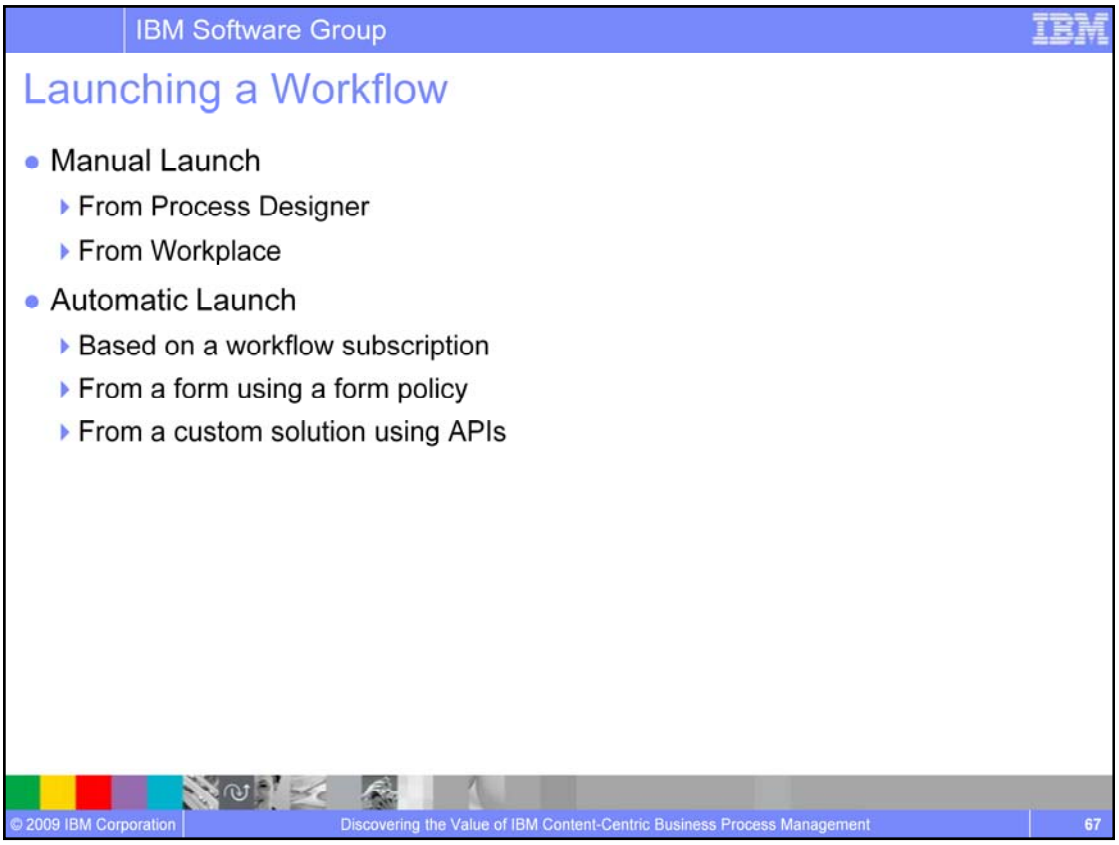
Additional Information:

To make workflows as error-free as possible, a validation process checks a workflow definition before it is transferred to the Process Engine (PE) database. Process Designer provides an integrated validation tool which both detects any errors and shows the step or route where the error occurs, making it relatively easy to correct any problems. PE also validates a workflow definition as it is transferred to the workflow database



Additional Information:

A workflow definition must be transferred to the Process Engine database in order to run. You can use the Transfer tool on the Process Designer toolbar to manually transfer the workflow definition.



Additional Information:

Workflows can be launched automatically or manually. Workflows can be launched automatically by using an entry template that includes an automatic workflow or from a subscription to a document, folder, form, or custom object. Workflows can also be automatically launched by custom programs.

Depending on the settings at your site, you may be able to manually launch a workflow from Workplace. Workflows can be launched manually by using an entry template that includes an automatic workflow or from a subscription to a document, folder, form, or custom object.

When you launch a workflow, a work item is created, and you can set any information needed for the Launch Step in the workflow. The work item is then routed to the appropriate work queue for processing.

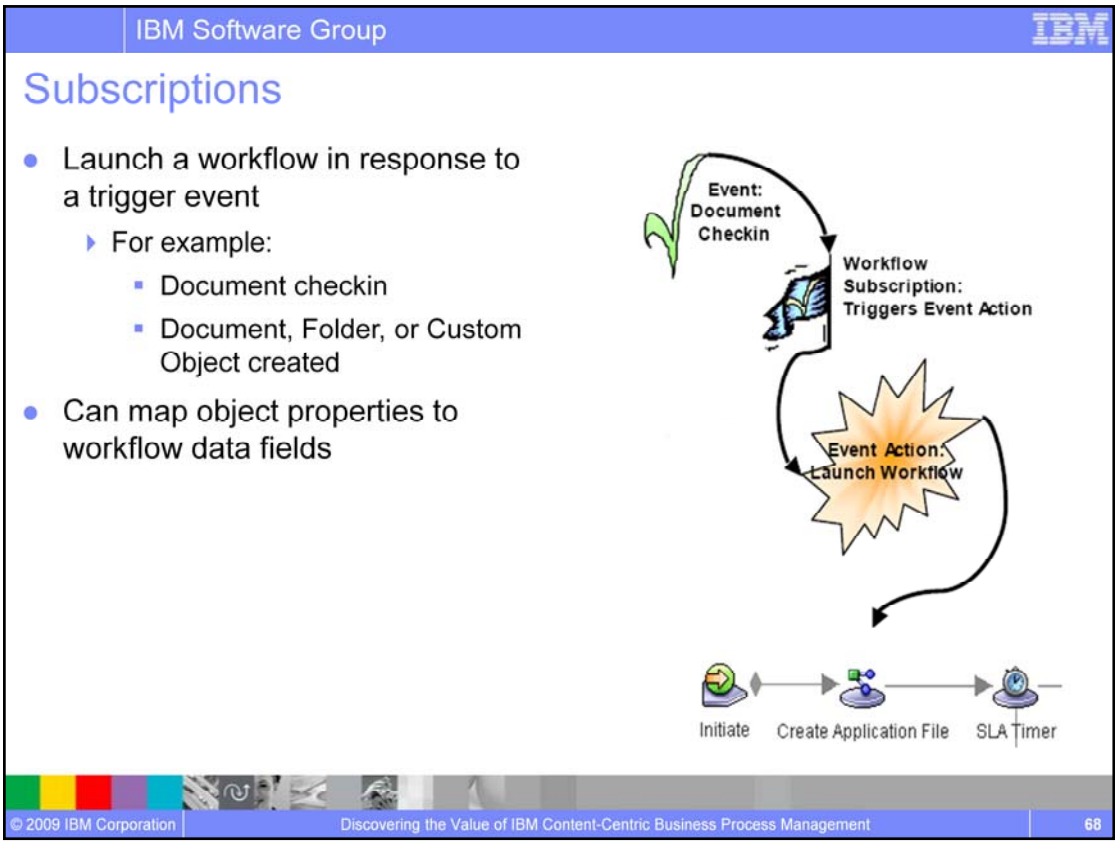
There are four ways to manually launch a workflow:

•Launch from a workflow definition

•Launch from an entry template that includes a workflow definition

•Launch from a form, document, folder, or custom object with a workflow subscription

•Launch workflow from a form

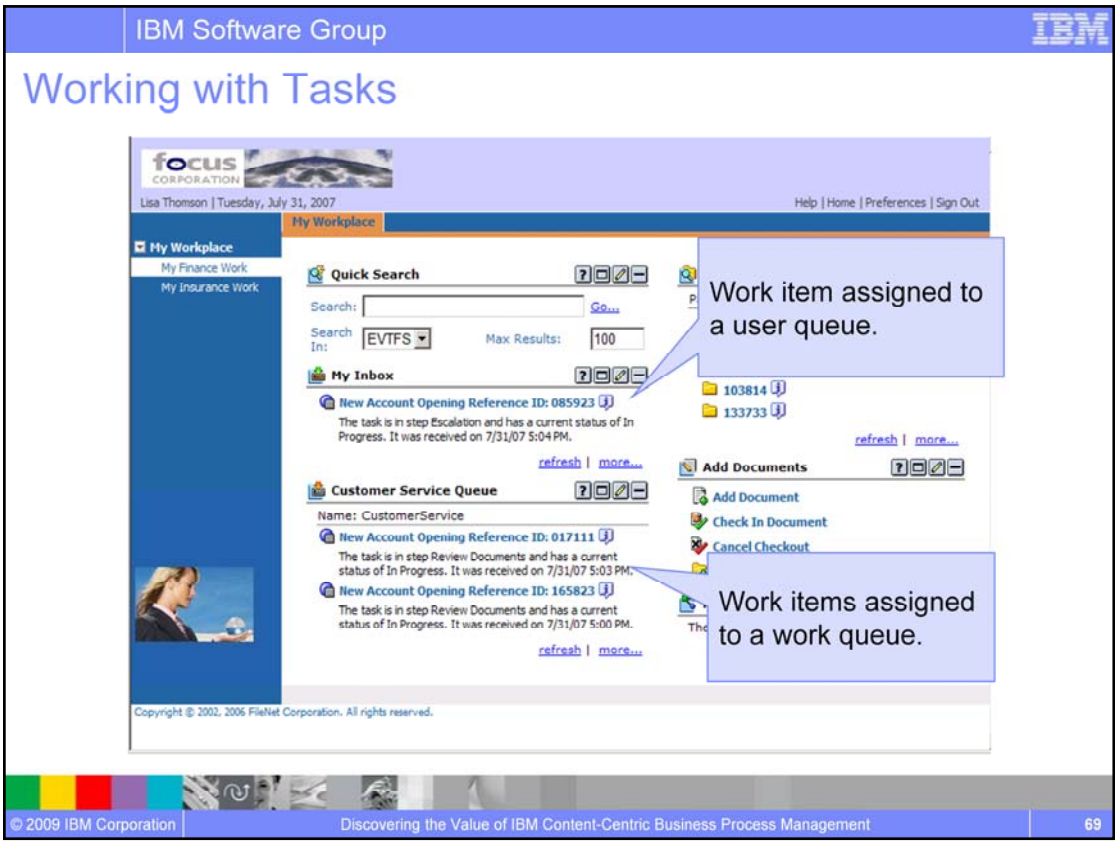


Additional Information:

Subscriptions provide the capability for content to become an “active” participant in a business process.

If you have appropriate access rights, you can define subscriptions to associate a document class, a folder class, a form class, or a custom object class with a workflow definition for manual or automatic launching. When a specified event occurs for an object in the selected class, the workflow will be automatically launched or a user will be prompted to start the workflow. For example, your department may need to launch an expense report workflow each time a user adds a new expense report document. You could create a subscription for the ExpenseReport document class that defines the trigger events and the workflow to launch. A different subscription could define a different workflow to launch when the expense report is checked in with modifications.

The subscription definition determines which events will cause the workflow to launch. For example, an approval workflow may be launched when a new document is added or when a new version of the document is checked in.



Additional Information:

When a workflow is launched, it is actually a work item that is created and routed through the workflow.

The work item contains everything that is needed, in terms of data and references to system information, for a participant to complete a step in a workflow.

As work is routed through the workflow, it is placed on queues for processing. The type of queue is based on the step type. A user queue holds work items assigned to a particular user. A work queue holds work items that are processed by one of a group of participants or by an automated process. Not all work items are processed by users. A system queue holds work items that are processed by the system without direct human interaction. A component queue holds work items that can be completed by an external entity that interacts with the workflow via the Component Integrator.

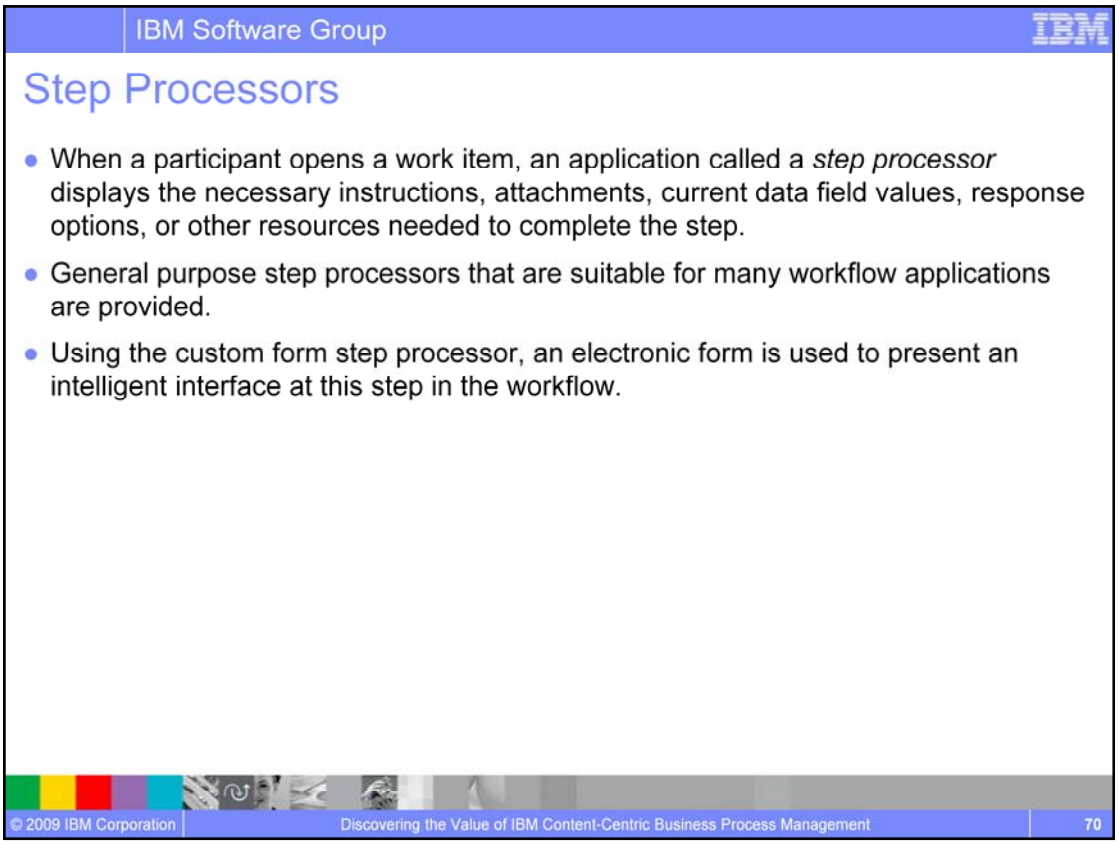
A workflow participant is any user or group who is assigned to process work in a workflow.

As we have seen, there are a number of ways participants may be assigned to a step in a process:

•Users may be explicitly assigned work

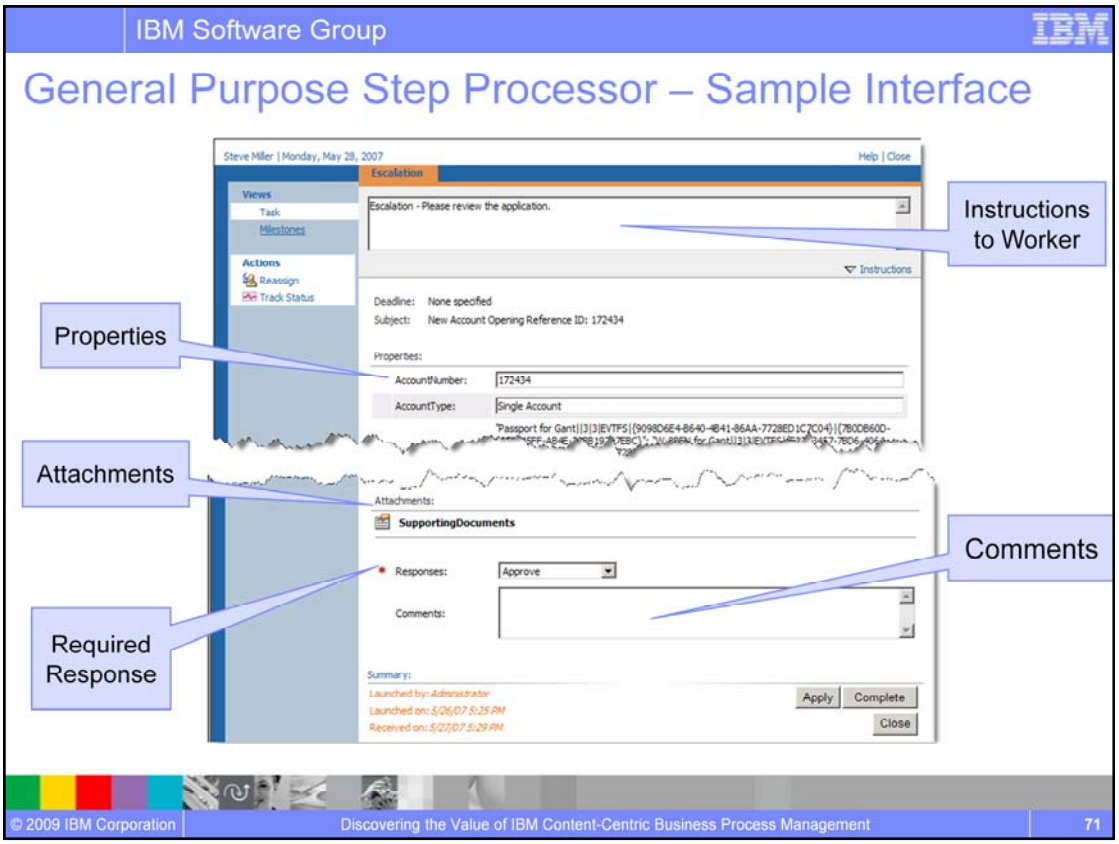
•Work items may assigned to a public work queue

•Workgroups may be used, where the participants are determined dynamically at run time.



Additional Information:

A step processor is an application that provides the information and resources for a participant to complete a step in a workflow. In a workflow definition, the author specifies which step processor to use for each step. When a participant opens a work item at runtime, the step processor displays the necessary instructions, attachments, field values, response options, and other resources the participant needs to complete the work. A step processor can also accept input from the participant.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General Purpose Step Processor – Sample Interface
Instructions to Worker
Properties
Attachments
Comments
Required Response
Escalation - Please review the application.
Deadline: None specified
Subject: New Account Opening Reference ID: 172434
Properties:
AccountNumber: 172434
AccountType: Single Account
Attachments:
SupportingDocuments
Responses: Approve
Comments:
Apply
Complete
Close
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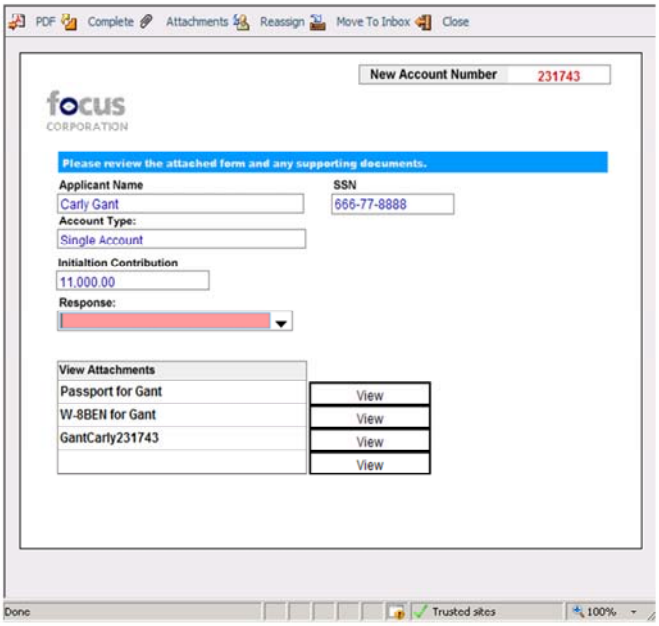
Form Step Processor – Sample Interface



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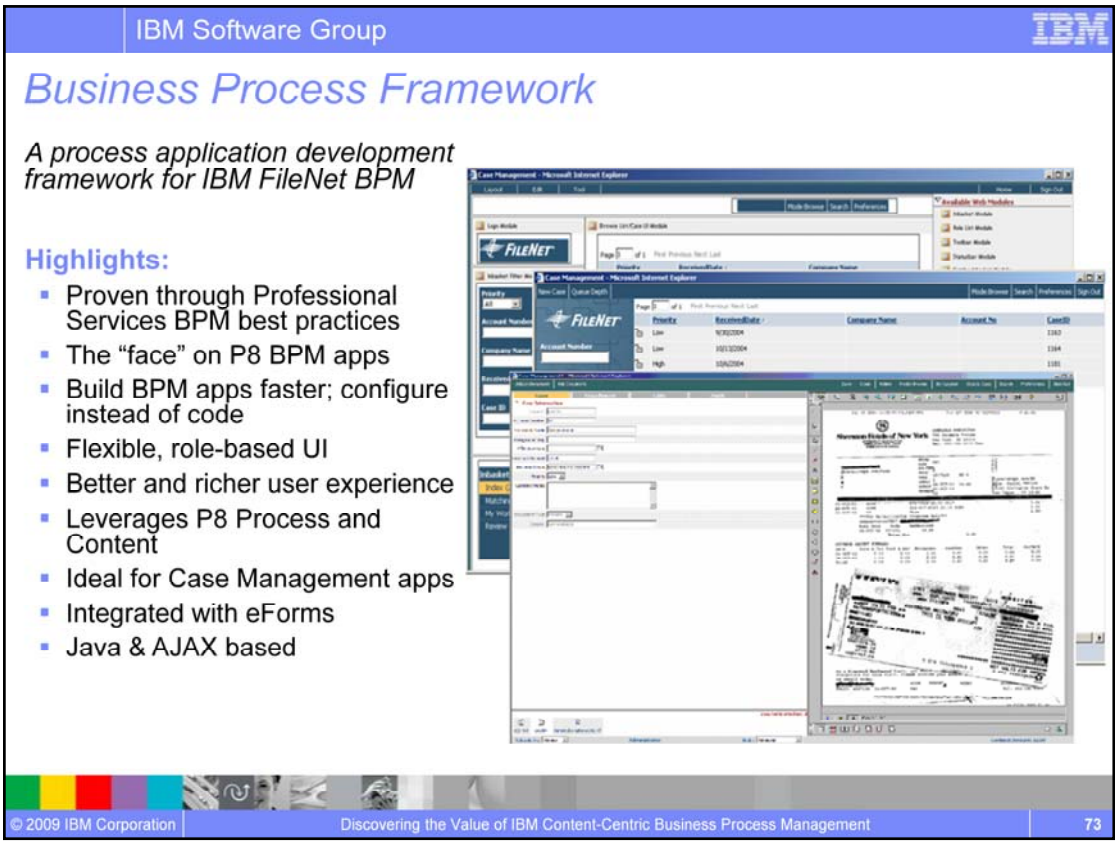
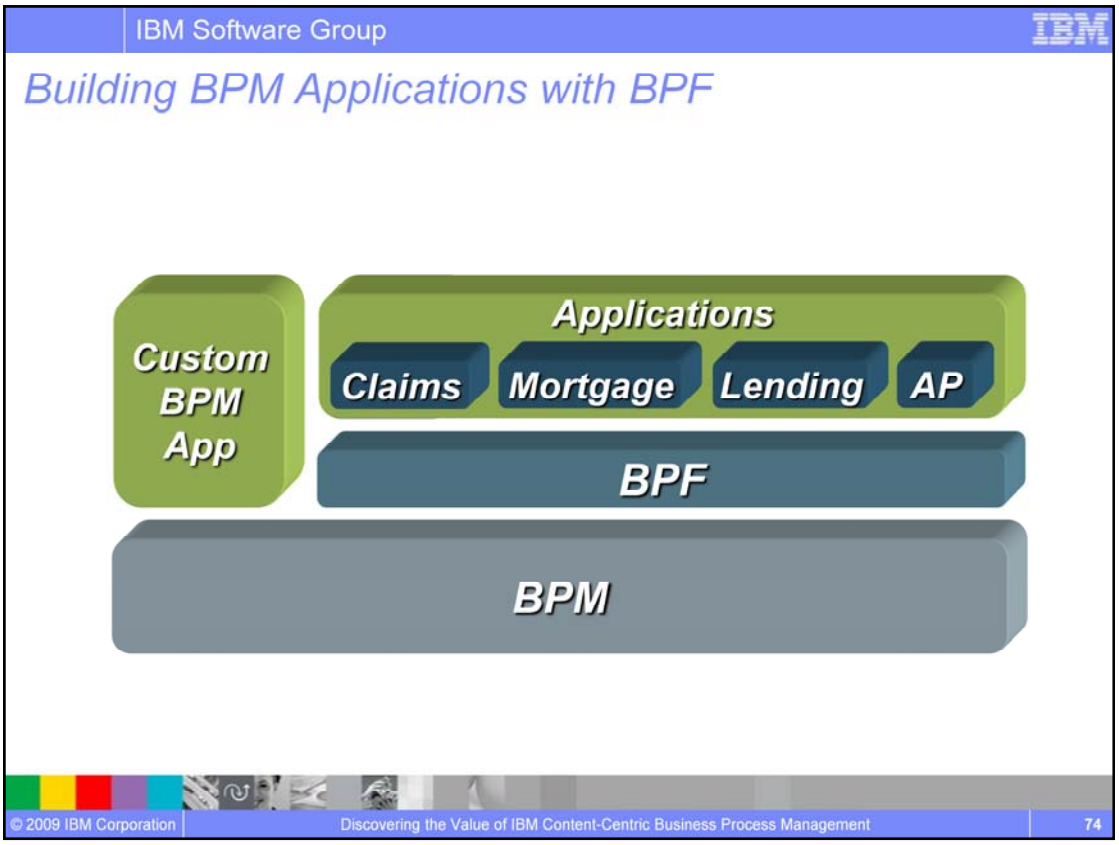


Additional Information:

As organizations realize the tremendous impact by automating and integrating business processes – IT developers desire a way to develop and deploy these applications or processes more quickly.

To allow customers faster deployment and encourage self sufficiency, FileNet developed a Business Process Framework, or BPF. This framework enables greater efficiency, primarily speeding the Development and Deployment of BPM applications.

With its consistent application development framework, BPF provides a quality, highly configurable base to dramatically reduce the amount of new, unproven code required to complete a project. Code can be made consistent and reused, therefore easing maintenance burdens. Additionally, because it already integrates content and process, many common work management features are already built into the base code. This case-based framework is able to adapt to most application requirements without significant coding. Furthermore, Configuration Tools provide a way for a properly trained developers to easily modify and tailor the application to changing business and application requirements. These items significantly reduce costs compared to an application written from scratch for a custom project.



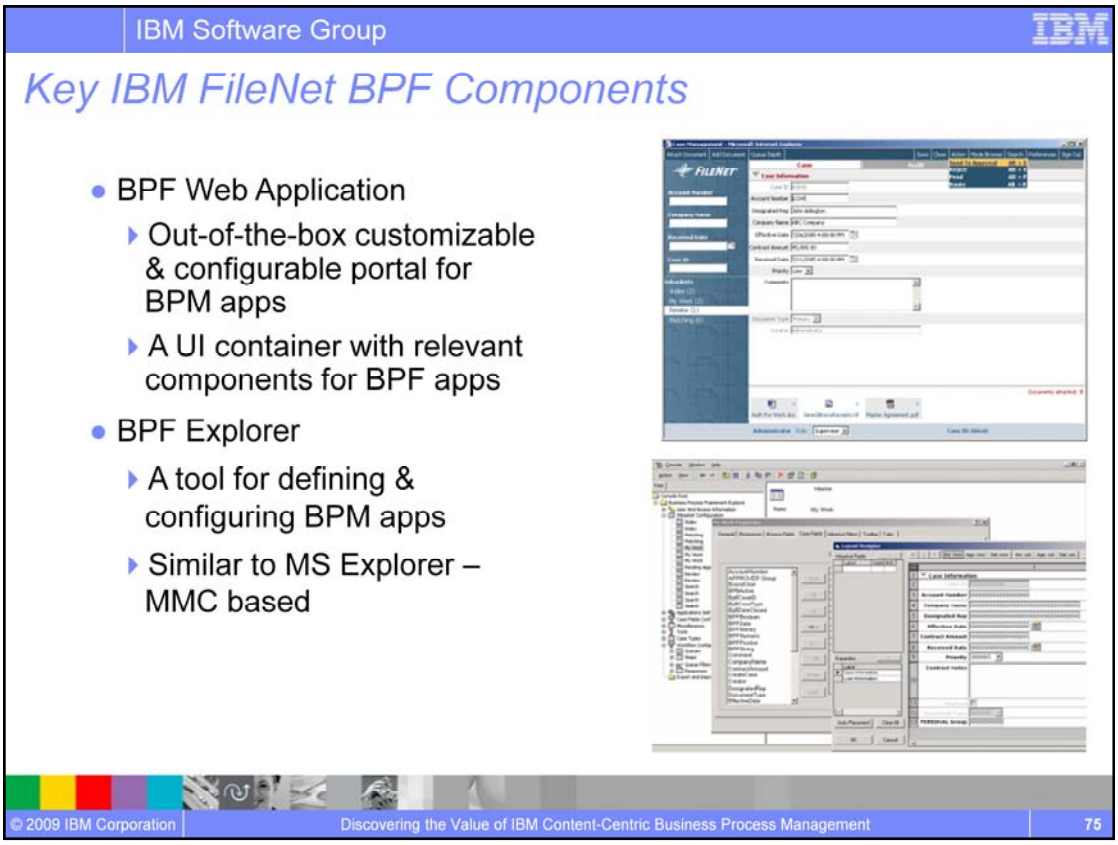
Additional Information:

1. Without BPF a custom app is built on top of BPM and can be still be resource intensive especially in terms of UI dev.

2. With BPF building BPM apps becomes easier and quicker via configuring as opposed to coding (it uses BPF out of box functionality). BPF offers out-of-the-box UI components that can be configured and customized.

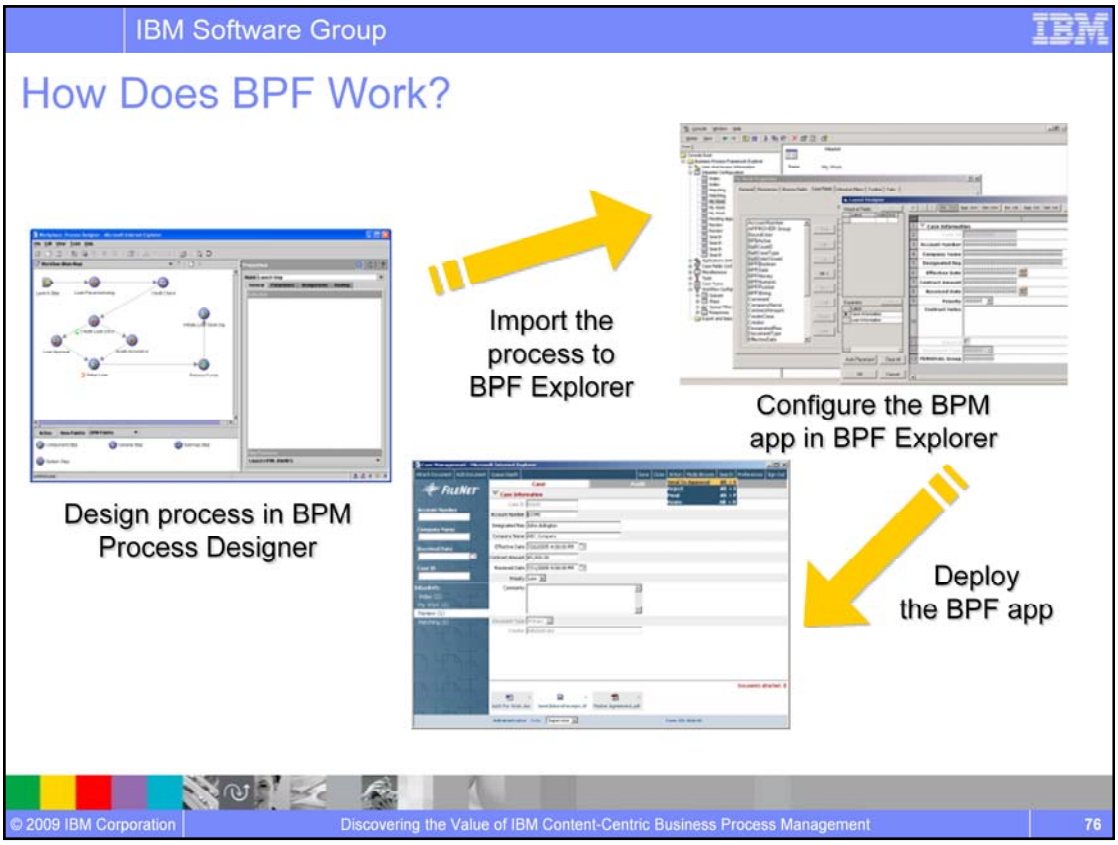
3. BPF apps and components and artifacts of such apps can become reusable “templates” for various horizontal (e.g. AP) and vertical (e.g. insurance, banking) apps.

Note that in terms of process modeling nothing changes. You still need to do your modeling/design of process in BPM Process Designer. Once you are done with that you import the process to BPF and that creates all the necessary workflow components for BPF.



Additional Information:

BPF consists of 2 key components as above. BPF Web App is the end-user perspective and is the outcome of BPF Explorer which is the developer tool.



Additional Information:

Process modeling and design is the same whether you use BPF or not. You use Process Designer as before. Once the model is complete you import it into BPF Explorer. Once it is imported to BPF Explorer you can configure and define UI elements and behavior in BPF and then deploy the process application onto the Process Engine and Application Engine.

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Lab: Define a Workflow Submap

Overview

Introduction

In this lab, you start with an existing workflow definition, define a submap that demonstrates basic features, validate the workflow definition, transfer the workflow definition to the process engine, and test the submap working with the existing workflow.

Lab Objectives

- Define the submap
- Validate and transfer the workflow definition
- Test the workflow

Exercises

This lab contains the following exercises:

Exercise	Lab Page
Step-by-Step - Implementing the Process Model	54-69
Step-by-Step - Modifying the Workflow Definition	70-118
Step-by-Step - Launching and Test the Workflow Definition	119-142

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Process Design Lab Summary

- Comments or questions
- Graphical easy-to-use tool for visually capturing processes
- Abstracts business logic and rules from implementation details

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Process Definition

Application Integration and BPM

- Use external components in your business process

An IBM Proof of Technology

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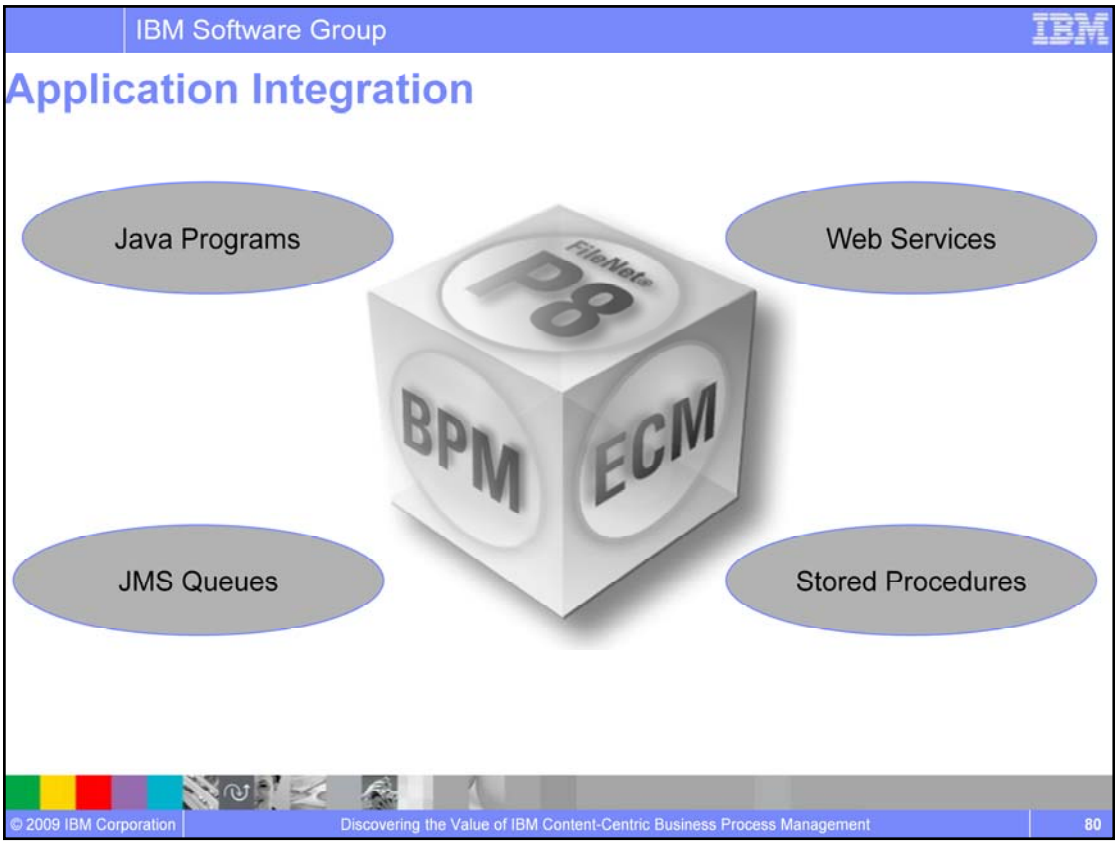
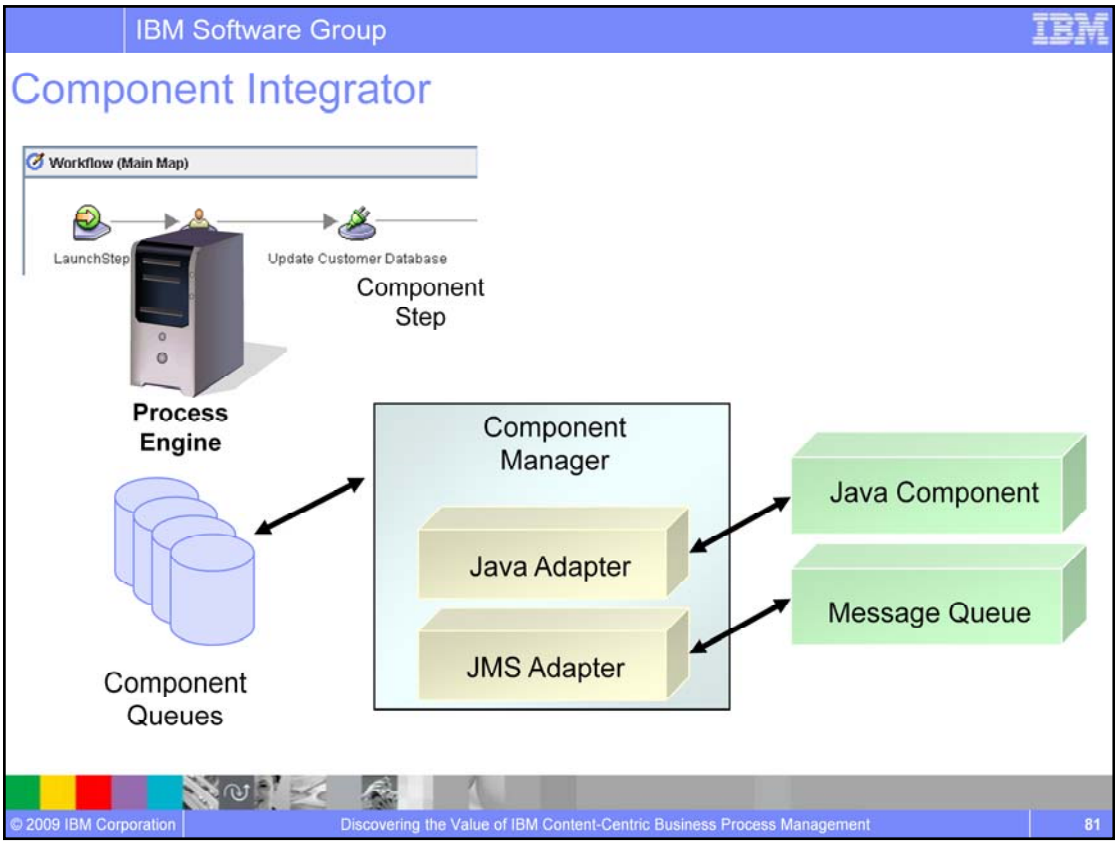


Additional Information:

FileNet provides a native service that makes it possible to interact with an external entity, such as a Java object or JMS queue, from a workflow step.

There are many different ways to integrate P8 ECM and BPM with other applications in your enterprise. Options range from basic database lookups using stored procedures to the use of Web services to integrate various information located in disparate applications.

A Web service is a program that communicates with another application over a network. Within the context of BPM, a process can consume a web service, or it can provide a service itself.



Additional Information:

BPM provides an extensible integration capability for calling any component from a workflow step. For example, from a step you can make calls to a Java class that updates information in a corporate customer database.

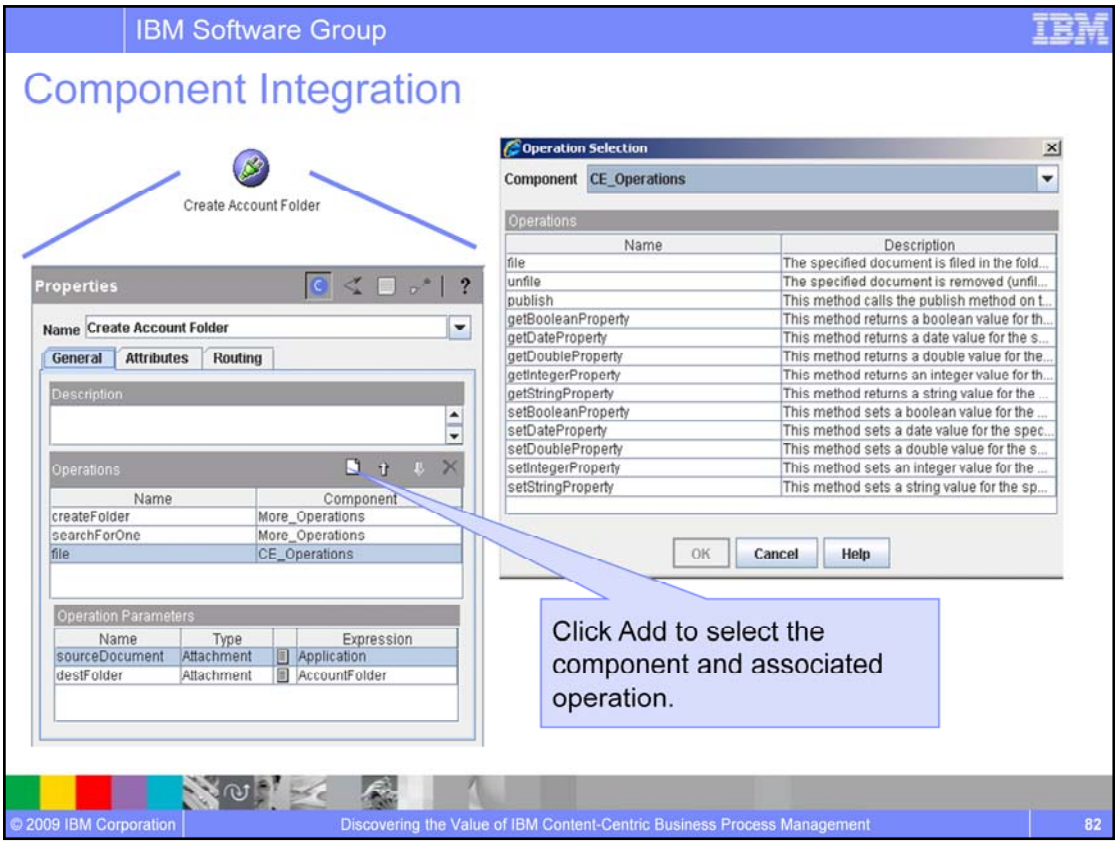
The Component Integrator provides this application integration capability for interacting with a component from a workflow step. It is a FileNet BPM service that connects the Process Engine with an external system.

The Component Integrator contains the following elements:

•Component Manager, which polls Component Queues for work items. At runtime, the Component Manager connects a work item that is requesting a component to the appropriate Service Adaptor.

•Service Adaptors (Java or JMS), which execute the interface to the component. FileNet currently provides Java and JMS (Java Message Service) service adaptors for calling Java components and interacting with message queues.

The Component Integrator gives you an easy way to implement components, such as Java classes, that are then used by less technical personnel to build workflows. For example, a step in a workflow can call a Java component that requests services from a 3rd party vendor. A workflow designer using Process Designer can invoke that Java class without programming.



Additional Information:

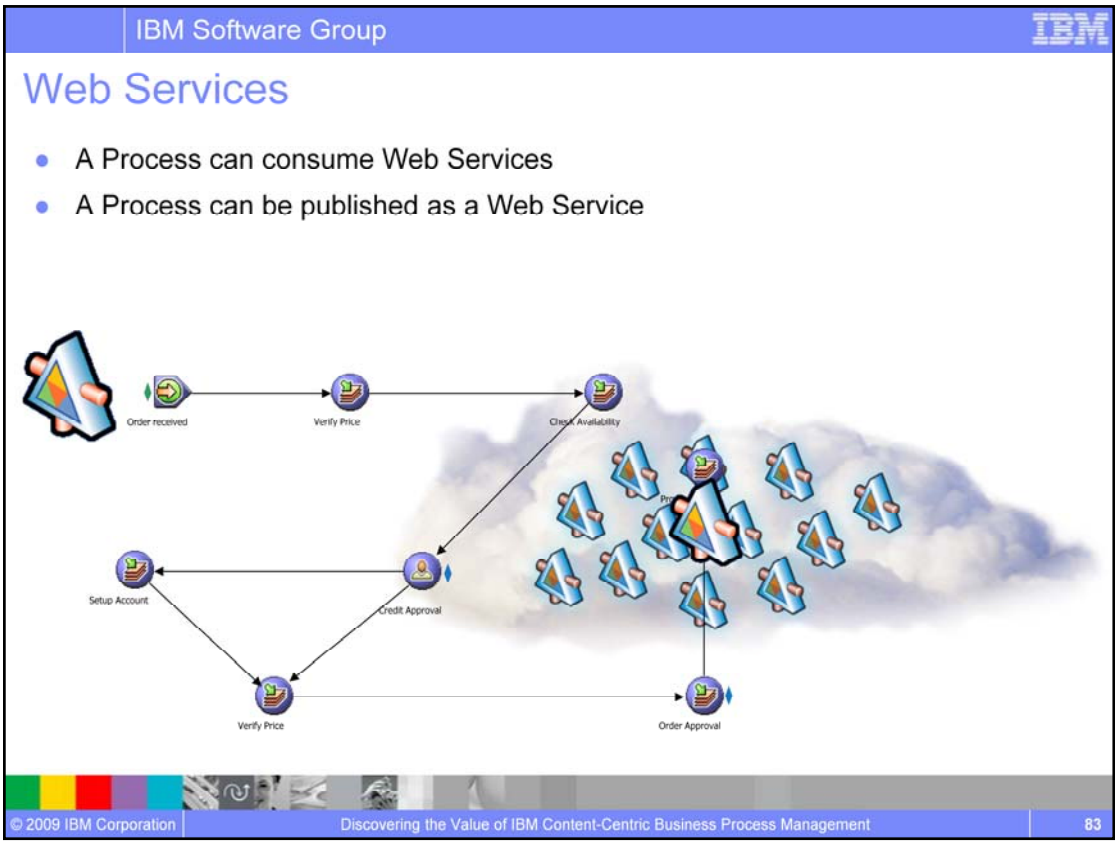
To make use of component operations, you add a component step to your workflow definition using Process Designer. A component step

represents an activity in the workflow that is assigned to one or more operations in a component.

In Process Designer in the component step Properties pane, click the Add button to display the Operation Selection dialog where you select a component, then select one or more operations for use in this step. On return to this dialog, the operations you selected are displayed. In the list of operations, select them one at a time, to display the list of parameters with their name, data type, and access. The Expression field contains a named expression for your use in specifying the value for each parameter.

You can also specify the incoming and outgoing routing properties for the component step, similar to other step types

To facilitate manipulation of documents in an object store, FileNet uses the Component Integrator infrastructure to provide Content Engine (CE) operations that can be used in a workflow in component steps.



Additional Information:

Web Services provide a function similar to components but with a different implementation.

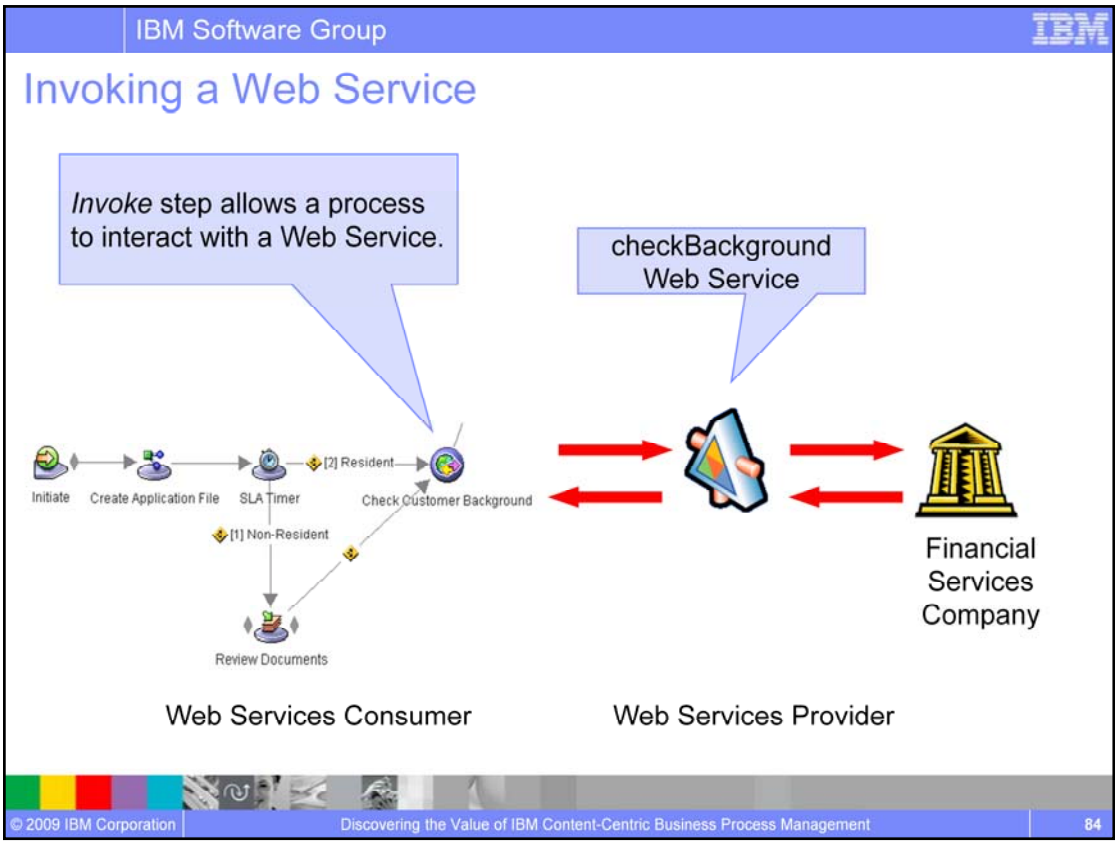
A web service is software that processes data and exchanges information with the service requester over a network, usually using a well defined protocol like SOAP (Simple Object Access Protocol).

Web services are often used to allow businesses to communicate with each other without worrying about how each implements specifics of their business applications. For example, one company (the service provider) could provide a web service that allows their customers to place orders for parts. The service provider only has to publish the interface in a publicly available forum (usually through a UDDI registry) and the internal implementation of that interface doesn't matter to the consumer. The consumer of the service (the company placing the order) can invoke this service – place the order - over the Internet.

Another common example would be an external service provider such as a credit rating company. Any application invoking the service and providing something like a Social Security Number (along, presumably, with billing information) then could receive a credit score for the SSN in question.

In Filenet P8, we can consume web services that are published in a UDDI registry, or if we know the URL for their invocation, WSDL.

We can also define a BPM process that can itself be published as a web service. The process is initiated whenever a request is made of it. It receives information, processes it as defined by the workflow, and then sends back a response to the requester.

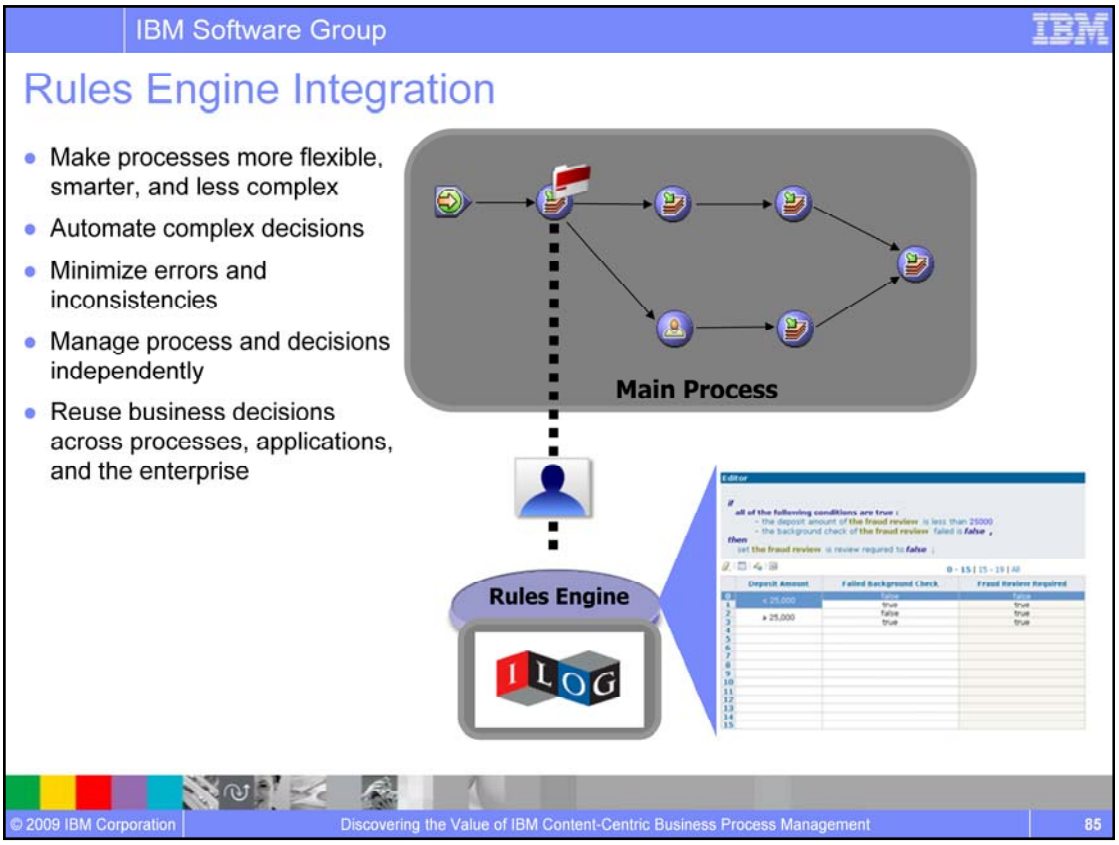


Additional Information:

The Invoke system function can be used anywhere on a process map. It is used to call an application component that has been exposed as a Web Service. This allows a workflow to interact with an external Web Service. The process designer can discover the Web Service using

UDDI when defining the workflow. The workflow designer maps incoming and outgoing (if any) fields from within Process Designer at

design time. There is no coding required to invoke a Web Service. The WSDL of the Web Service defines the form of the incoming and outgoing parameters.



Additional Information:

Integration with a business rules engine (BRE), can be an excellent resource for process optimization.

A typical business process often includes a number of decision points. These decision points generally have an effect on the process flow; for example, someone's credit rating may determine whether he or she is approved for a low-cost loan. These decisions are evaluated based on certain conditions and facts, which may be internal or external to the business process, and predefined company policies or rules. Business rules engines (BREs) allow architects to easily define, manage, and update the decision logic that directs enterprise applications from a single location without needing to write code or change the business processes calling them. BREs have been used extensively in enterprises; e.g., to implement yield management in the travel industry (what price to sell a ticket?), credit risk assessment in the loan industry (what is the interest rate for my car loan?), operations scheduling in manufacturing (what should we build today to maximize throughput and keep customers happy?), and the list goes on.

BPM technology and BREs naturally fit together: BPM enables automated and flexible business processes; BREs enable automated and flexible business policies. BREs contribute to agility by enabling reduced time to automate, easier change, and easier maintenance for business policies and rules.

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Lab: Enterprise Application Integration

Overview

Introduction

In this lab, you will review an existing component that is being used by the process. You will also replace a manual step in the process with a call to a web service. Finally you'll implement a rules engine to enforce external logic on the business process.

Lab Objectives

- Review and understand the existing component integration
- Update the process to invoke a simple web service and integrate a rules engine
- Validate and transfer the process
- Test the upgraded process

Exercises

This lab contains the following exercises:

Exercise	Lab Page
Step-by-Step - Component Integration	**143-179**
Step-by-Step - Business Rules Integration	**180-201**

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Lab Summary

- Leverage existing P8 components that provide commonly used P8 actions
- Easily exploit web services to replace manual steps, thereby decreasing process turnaround time

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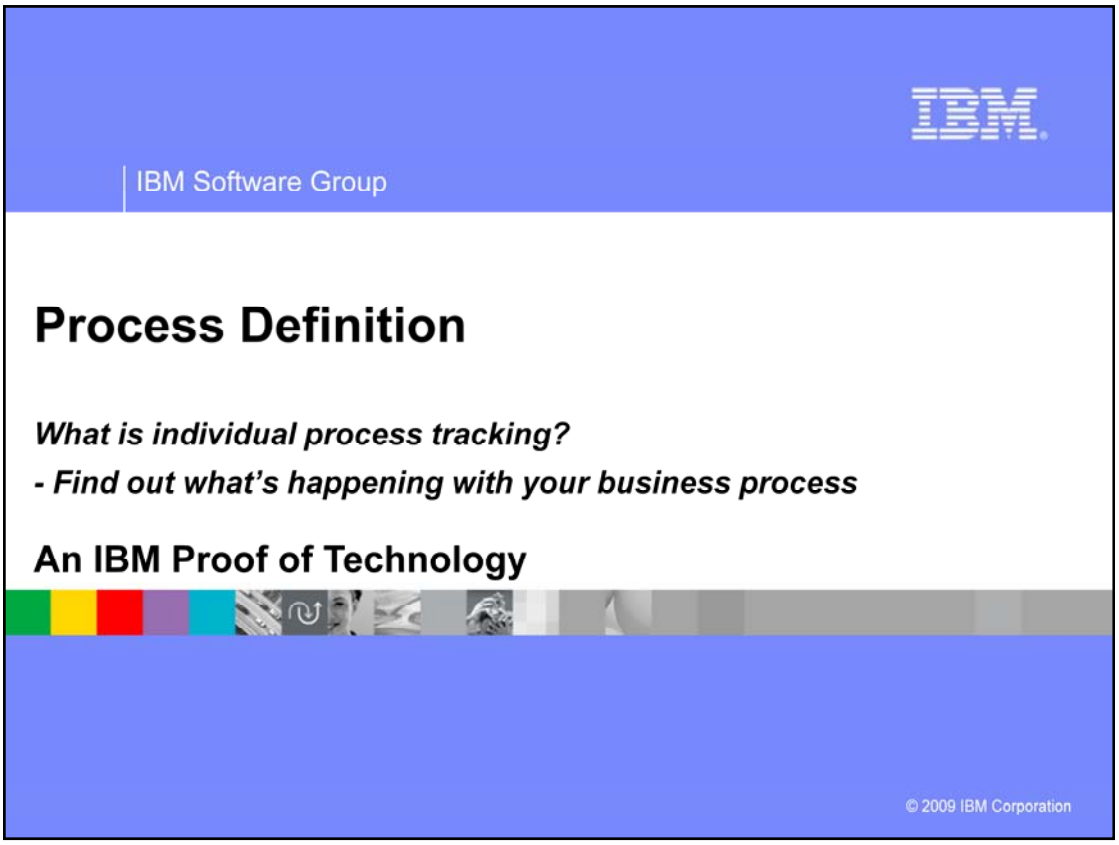

Additional Information:

The fourth major category of functional capabilities that are needed to realize content-centric BPM is Process Management - the tools and capabilities to monitor the operational system to determine where we can apply improvements and determine overall business trends and analysis. One specific functional capability in this functional area is real-time management of individual process instances. This is provided by the IBM FileNet Process Tracker.

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Process Tracking and Notification

- Timers
- Deadlines
- Milestones
- Managing Processes
  - Process Administrator
  - Process Tracker

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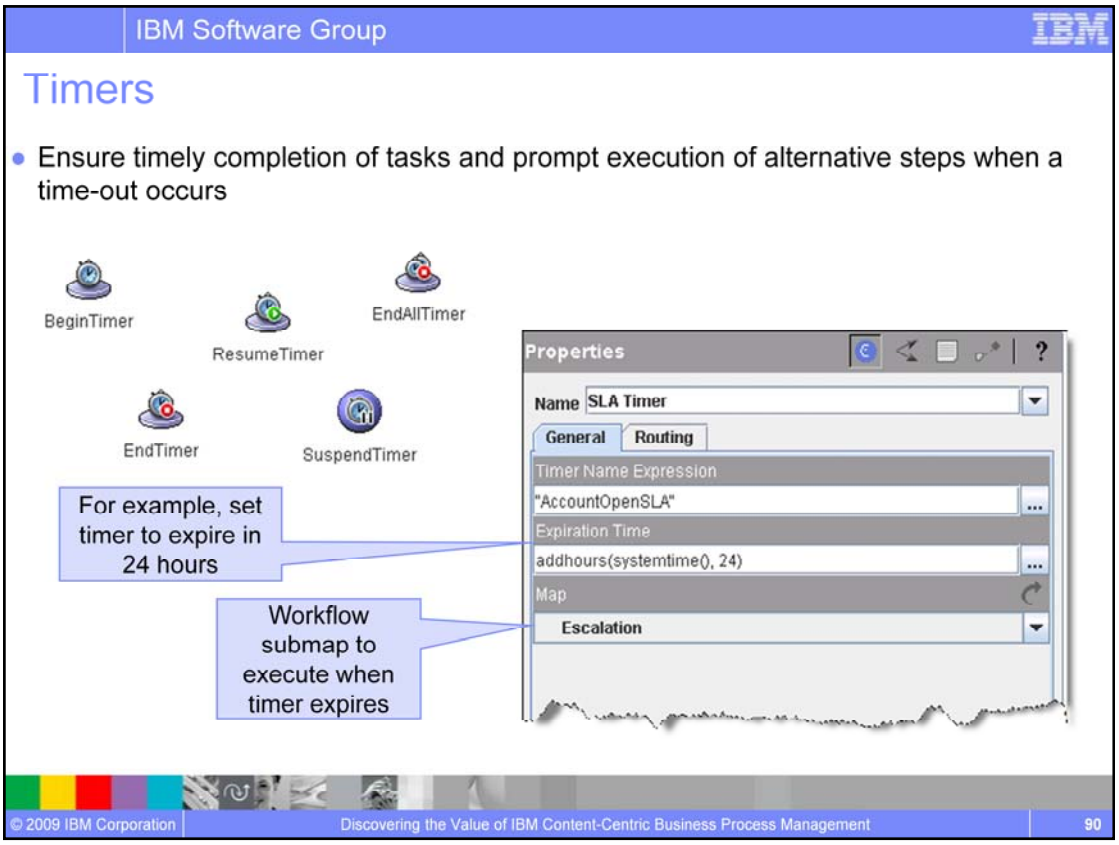
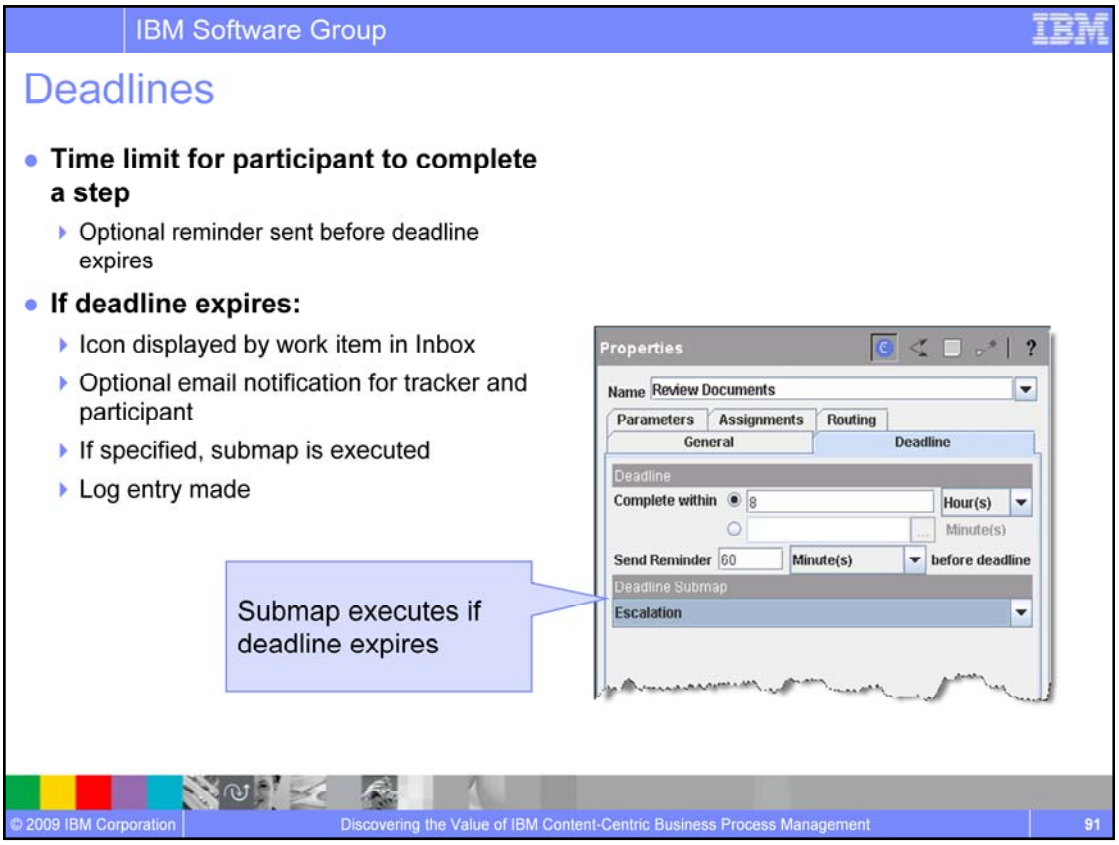


Additional Information:

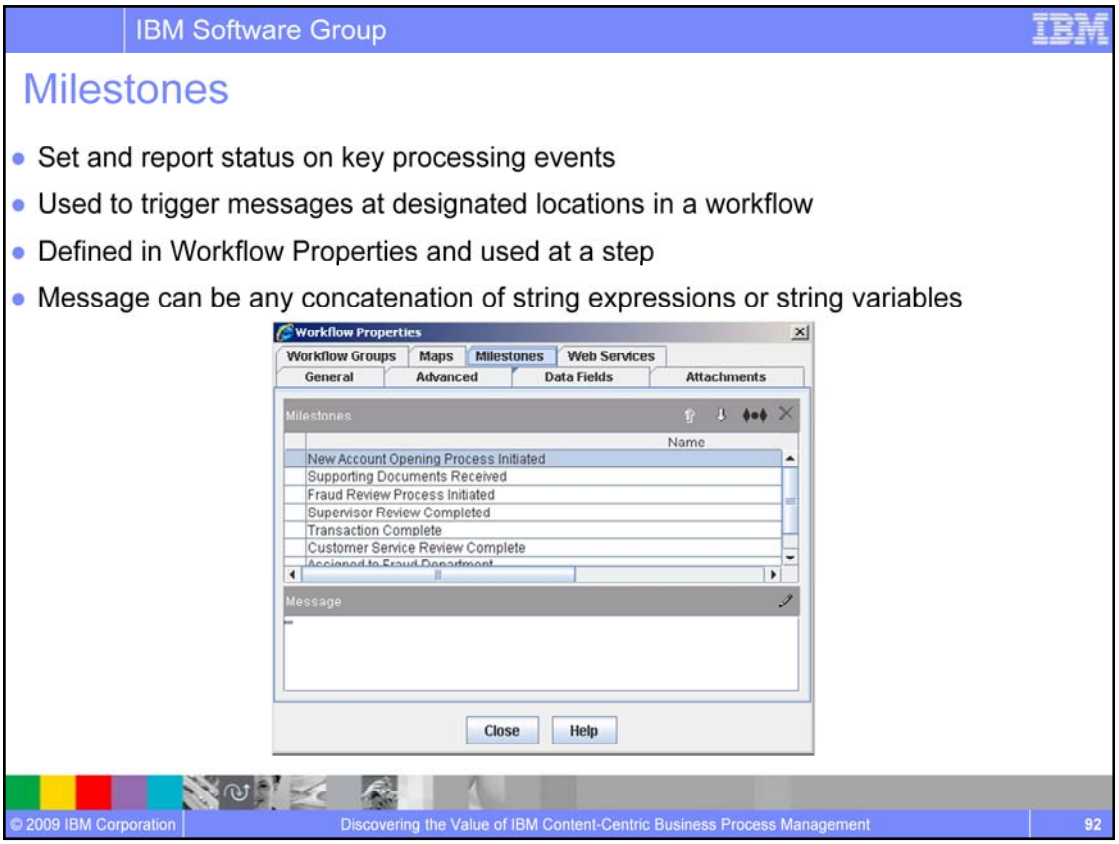
Use the BeginTimer system function to specify the beginning of a series of steps to be executed within a specified period of time. The BeginTimer system function indicates the timer name, the duration, and the name of the workflow submap to execute if the timer expires.



Additional Information:

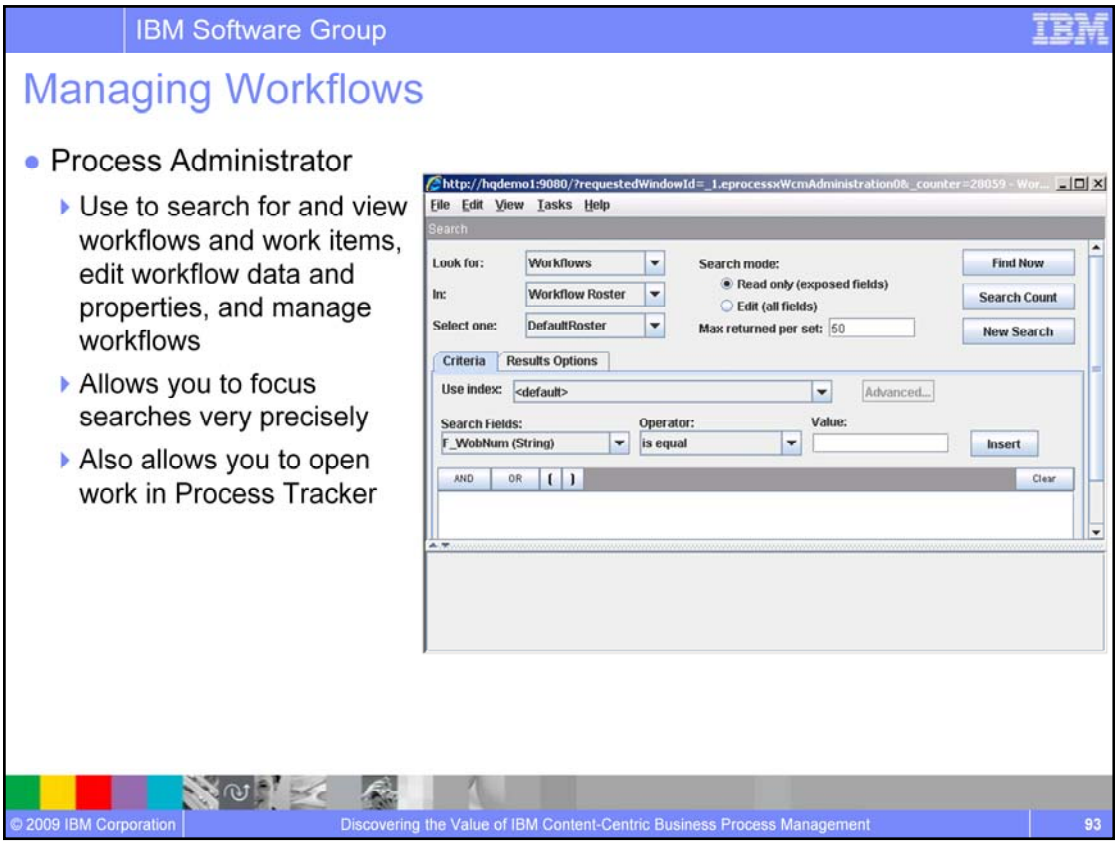
You can specify a time limit for a participant to complete a step. The deadline indicates an amount of time relative to the time that the step was routed to the participant. Optionally, you can specify that the assigned participant receive a reminder of the pending deadline; the reminder is relative to the expiration time of the deadline. You can also define a submap that will execute if the deadline expires.

If the participant does not complete the step within the specified time, an icon displays in front of the step name in the participant's inbox. If the participant selects email notification for deadlines and reminders, an email message is sent when these events occur.



Additional Information:

To track the progress of a workflow, the workflow author can define key points (milestones) in the workflow. On the workflow map, a milestone can be placed either before or after a General step, or after the Launch step. When the running workflow reaches a milestone, an author-specified message is written to a log file and, depending on its author-specified level (1 to 99), the milestone displays for workflow participants, trackers, and the user who launched the workflow.



Additional Information:

With Process Administrator, you can search for and view workflows, edit workflow data and properties, and manage workflows. Process Administrator provides a wide variety of options so you can focus your search very precisely.

After you locate one or more workflows or work items, you can use Process Administrator to make various changes to the work in progress, such as:

•Complete a step and send it on to the next step.

•Modify workflow field values.

•Assign users to or remove users from a workflow group.

•Delete an entire workflow or one or more work items.

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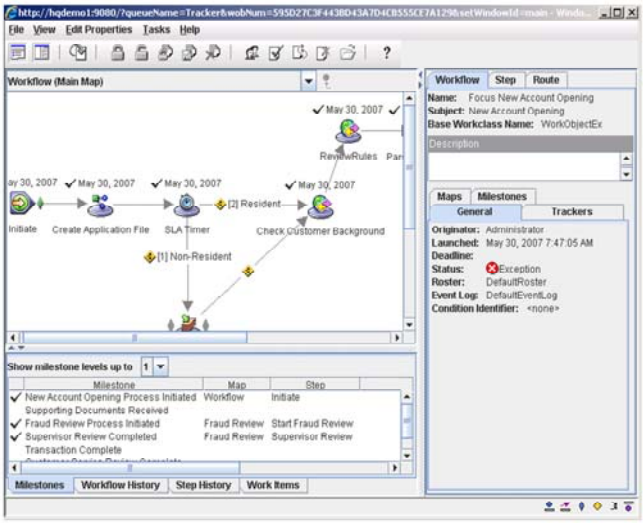
Managing Workflows

- Process Tracker
  - Monitor, manage, and modify workflows
  - Provides at-a-glance status of a workflow that is currently in progress
  - Use to identify what steps have been completed, when they were completed, and which steps are currently active
  - Tracker participant specified in the workflow definition to track a particular workflow



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Additional Information:

Process Tracker is a tool for viewing a graphical representation of a workflow that is currently in progress, including values at currently active steps and historical information retrieved from event logs. You can see which steps have been completed, when they were completed, and which steps are currently active.

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Lab: Process Tracking and Notification

Overview

Introduction	In this lab, you will observe how timers may be used to ensure Service level Agreements are met. You will also use Process Tracker, one of the available tools for managing and tracking the progress of work items.
Lab Objectives	• Understand available capabilities for ensuring work is processed in a timely manner. • Understand how to track the progress and status of work items.
Exercises	This lab contains the following exercise:

Exercise	Lab Page
Step-by-Step – Process Tracking and Notification	**202-210**

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Lab Summary

- Comments or questions
- Automatic escalation through the use of process timers
- Automatically enforces Service Level Agreements within a process
- Track progress of a workflow

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Process Definition Summary

- Process design defined
  - Process Designer introduced and exercised
- Enterprise application integration illustrated
  - Java components, JMS components, Content Engine Operations, Process Orchestration
- Individual process tracking exercised
  - Process Tracker, Milestone Deadlines, audit log, process administrator

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Agenda continued

- **Process Optimization**
  - Process Analyzer and Process Simulator
  - Lab - Process Analyzer
  - Lab - Process Simulation
- **Performance Management**
  - Business Activity Monitor
- **Discussion - Next Steps**
- **Summary**

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Additional Information:

The fourth major category of functional capabilities that are needed to realize a content-centric BPM is Process Management - the tools and capabilities to monitor the operational system to determine where we can apply improvements and determine overall business trends and analysis. We have explored the real time management of individual process instances provided by the IBM FileNet Process Tracker. Now we turn our attention to the ability to determine the qualities of the operational system so we can apply improvements and determine overall business trends and analysis. This functionality is provided by the IBM FileNet Process Analyzer and Business Activity Manager.

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Process Optimization Outline

- What is process optimization?
- Process Analyzer
- Process Simulation
- Lab introduction
- Lab summary

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Process Optimization

What is going on?

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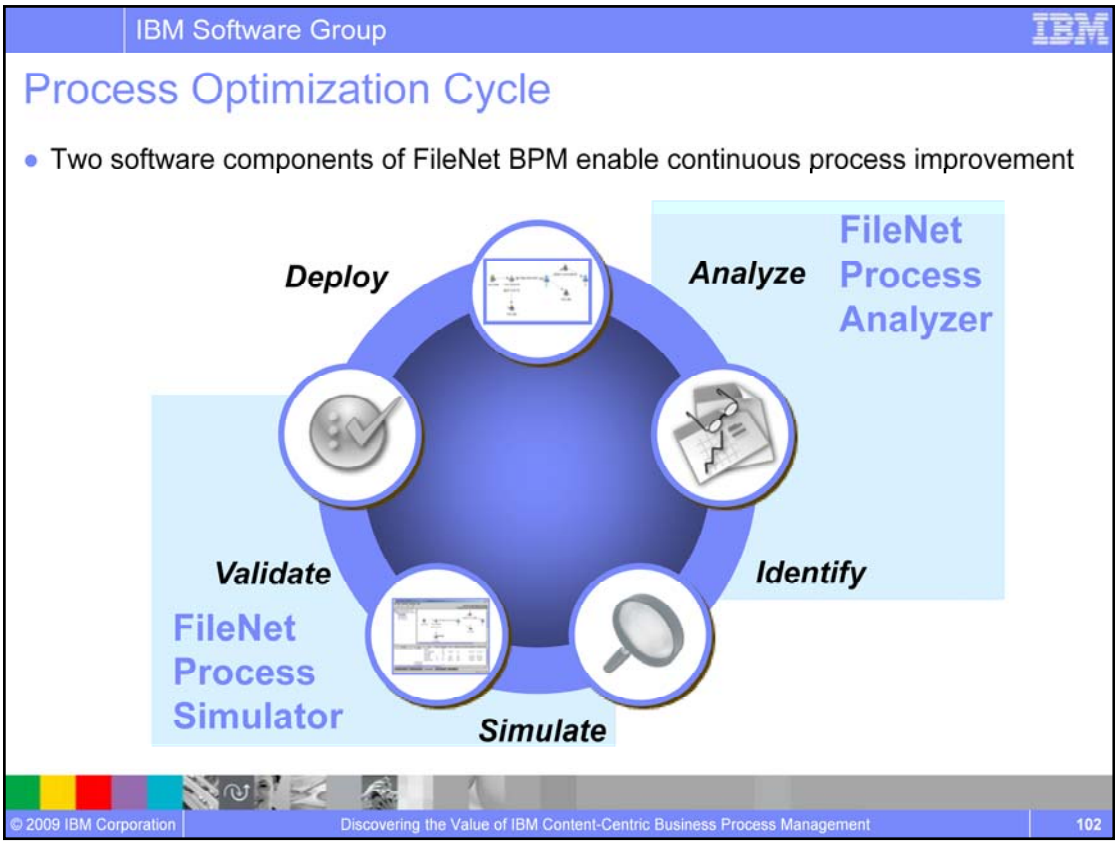

Additional Information:

As part of any Business Process Management implementation, organizations must implement a process optimization governance framework to ensure that business operations run at maximum efficiency.

•**Analyze:** Process analysis provides insight into how the process is functioning. Analysis can be performed during any part of the process lifecycle.

•**Identify:** Through analysis, one can identify process trends, monitor levels of performance, and identify ways to realign resources and other means to lower the cost of doing business.

•**Simulate:** After potential changes are identified, simulations of potential changes are run to ensure optimal resource utilization and perform “what if” analysis of various changes in assumptions.

•**Validate:** The analyst must validate the simulated processes to ensure predictable results and minimize business risk. The simulated environment is run through the FileNet Process Simulator engine to verify the assumptions are valid. Statistical results from the simulated environment can be run through FileNet Process Analyzer engine to ensure the business metrics and goals are met.

•**Deploy:** Move the validated process into production and begin the cycle anew.

Analytics and simulation capability are essential features of any BPM solution. These features enable continuous improvement of processes to boost business performance. At the same time, they reduce the risk of implementing an incorrect or marginal process.

•**Process Analyzer** is used in the ‘Analyze’ and ‘Identify’ stages of the Process Optimization Cycle

•**Process Simulator** is used in the ‘Simulate’ and ‘Validate’ stages

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Identify the OLAP Cube of Interest

To Analyze:	Use this Cube:
Workflow	
Workflow processing time in a time period	**Workflow Processing Time Cube**
Processing time or amount of work done in the system in a time period	**Work Load Cube**
Work Items	
The amount of work done in each queue in a time period	**Queue Load Cube**
Work item processing time in a time period	**Work Item Processing Time Cube**
Work In Progress	
Up-to-the-moment information about all current work items	**Work In Progress Cube**
Up-to-the-moment information about all current workflow	**Workflow in Progress Cube**
Routing	
Routing counts and percentages	**Routing Cube**

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Additional Information:

The first step in creating a custom report is to identify the PA Engine and the OLAP cube that contains the data of interest for your business requirement.

Workflow Processing Cube = Time is measured for each workflow (Deprecated, use Work Load cube)

Work Load Cube = *Work Load is counted when workflow is launched and completes*

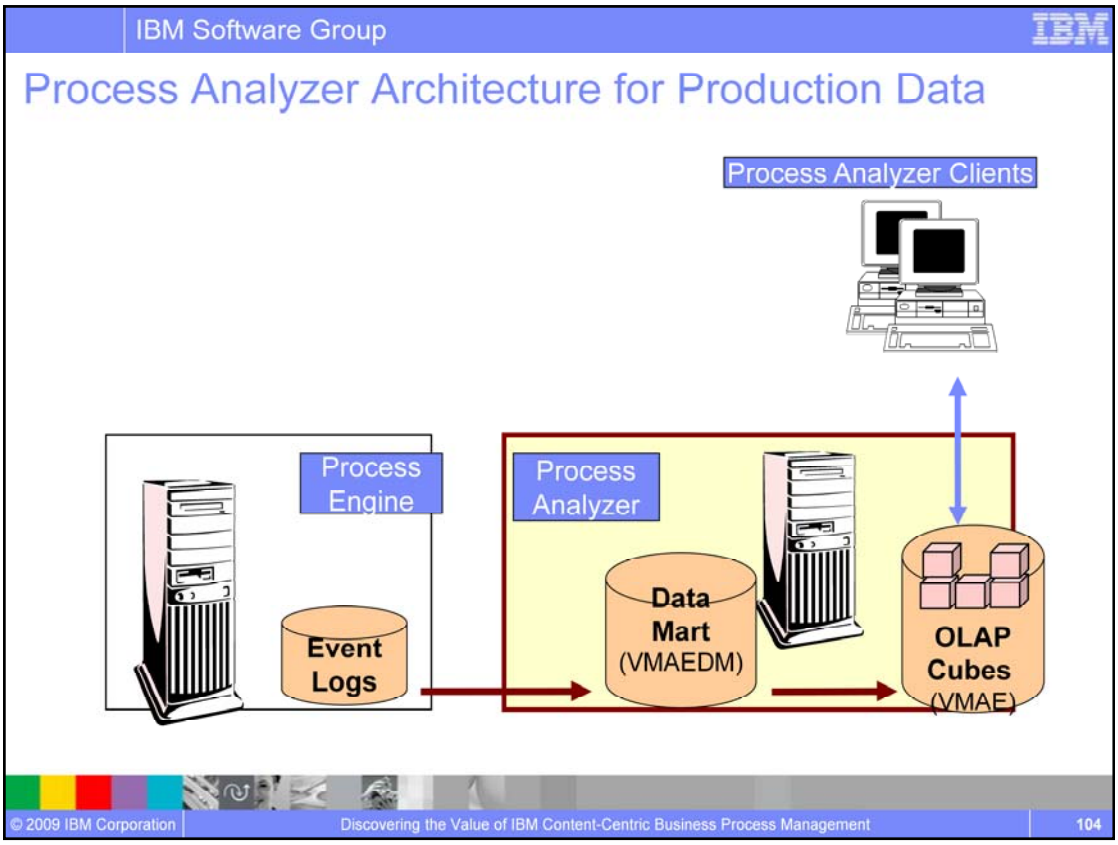
Queue Load Cube = *Queue Load is counted when work enters and leaves a step*

Work Item Processing Cube = *Time is measured for each step*

Workflow In Progress Cube = *Workflow age since launch captured and totaled for all active workflows*

Work In Progress Cube = *Work currently at each step*

Routing Cube = *Amount of route usage*



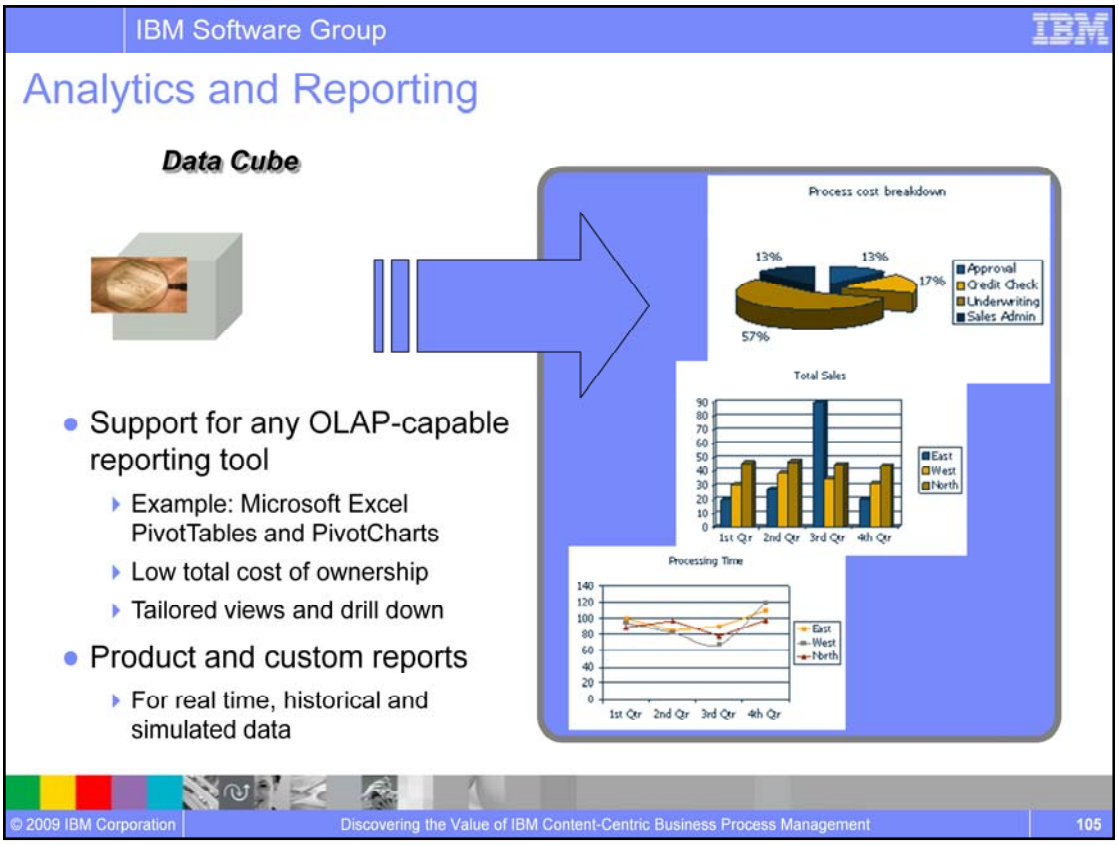
Additional Information:

Process Engine Data

Process Engine event log and system data is collected and written to an event table in the Process Analyzer Data Mart. Individual events are then analyzed, aggregated and published to fact tables in the Data Mart. The SQL database name of the Data Mart is VWAEDM. It contains an events table, fact tables and dimension tables.

Data Transformation

Aggregated data from the Data Mart is processed and OLAP cubes built. The SQL database name of the OLAP database is VMAE. Then the OLAP cubes can be queried and read by a Process Analyzer Client using an OLAP-capable reporting tool, such as Microsoft Excel.

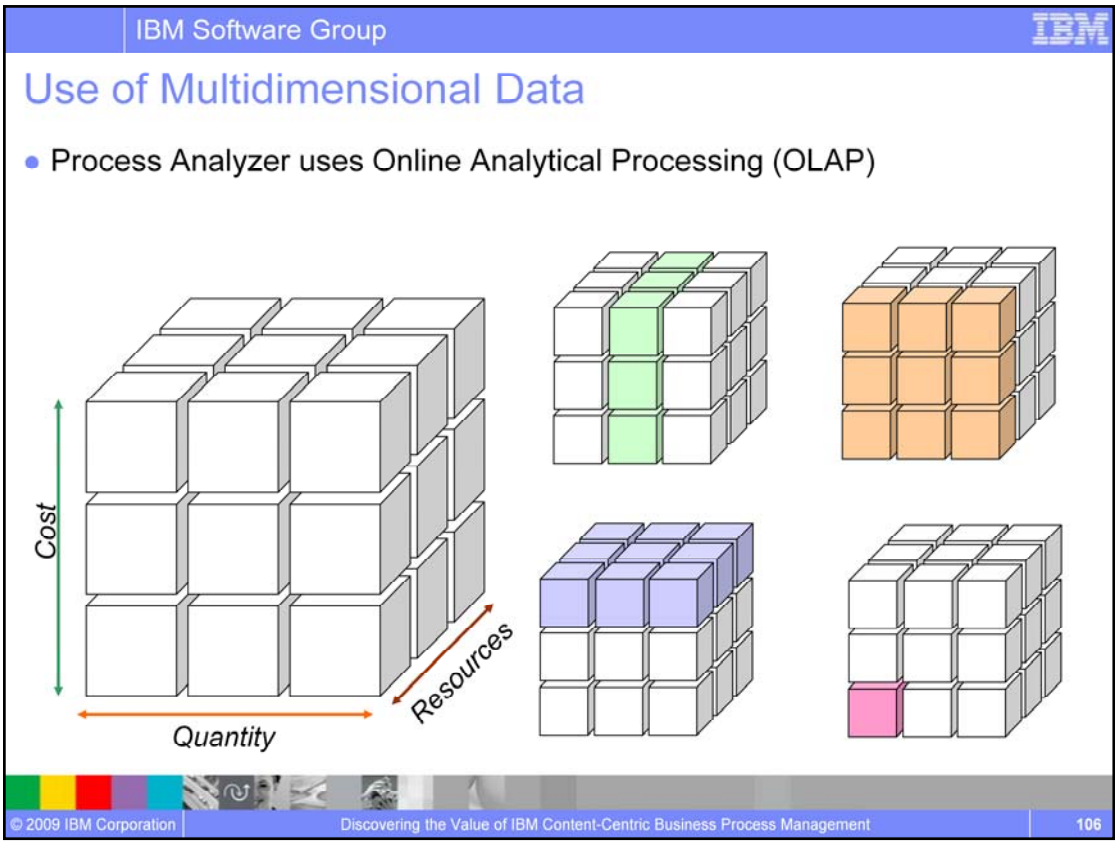


Additional Information:

The Process Analyzer's use of OLAP cubes allows users to employ any OLAP-capable 3rd Party report tool to analyze the data within them. This leverages any preexisting investment in a reporting and analysis infrastructure, allowing users to use tools and capabilities with which they are already familiar. These tools can also be used to rationalize the information contained in the Process Analyzer OLAP cubes with other data contained elsewhere in the enterprise.

User can change the granularity of the information presented by drilling down into the information contained in the reports. For example, if a chart presents quarterly workload data, it is possible to drill down to monthly data, or further down to data taken every 15 minutes.

FileNet Process Analyzer client comes with preconfigured Microsoft Excel workbooks containing charts that present commonly used metrics for evaluating workflows. These out-of-the-box (OOTB) reports can be used with real time, historical and simulated data. Reports can include data for the system, workflows, steps, queues and users.



Additional Information:

OLAP (On-Line Analytical Processing) is a technology that uses multidimensional structures to provide rapid access to data for analysis. OLAP enables analysts, managers, and executives to gain insight into data through fast, consistent, interactive access to a wide variety of possible views of information.

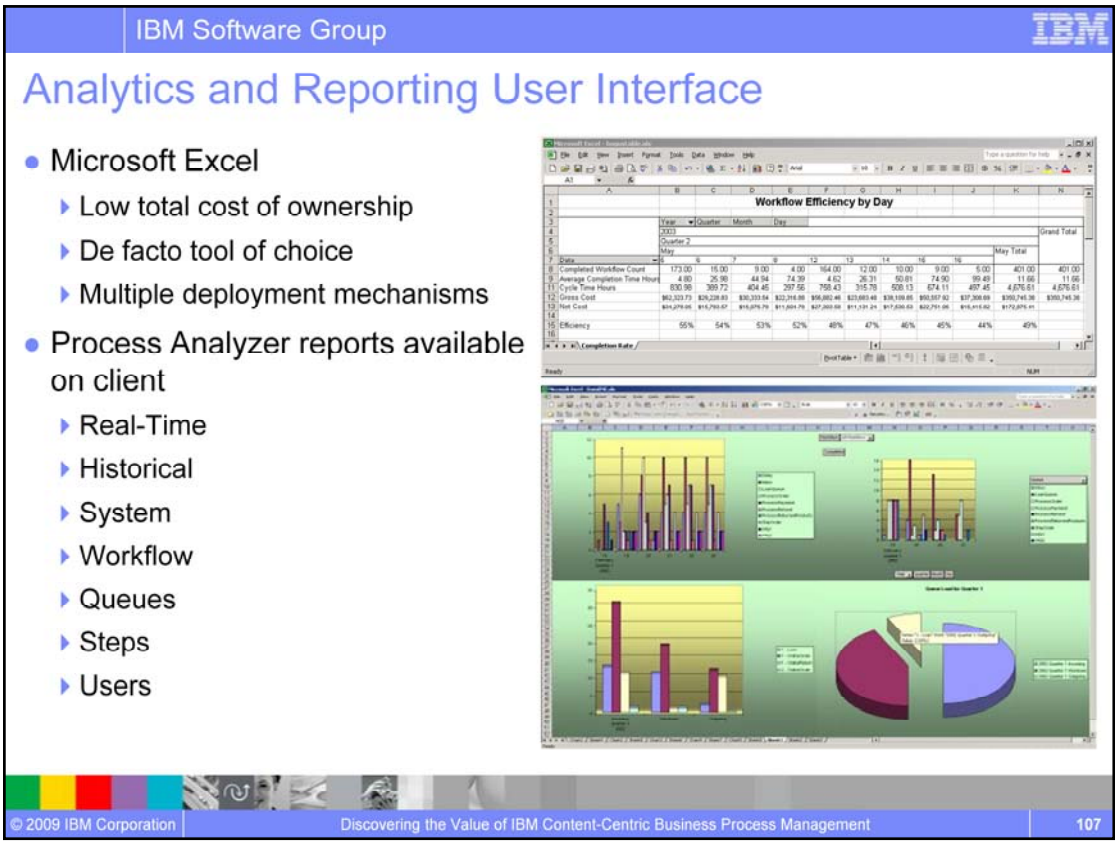
Databases configured for OLAP use a multidimensional data model, allowing for complex analytical and ad-hoc queries with a rapid execution time. OLAP takes a snapshot of a relational database and restructures it into dimensional data. The queries are run against this. The OLAP structure created from the operational data is called an OLAP cube.

The multi-dimensional nature of the OLAP cube model allows users to interrogate data in multiple ways. In a simple three-dimensional scenario a user can produce six different reports. Of course it is possible to use a cube with many more dimensions, and as a result produce many more reports, through slicing and dicing the cube. The multidimensional views represent actual business models.

For example, a manager may look at sales data by product, geography, channel, and time. A typical query submitted to an OLAP database is: "What was the total sales revenue for the eastern region in the third quarter?"

FileNet Process Analyzer Data

FileNet Process Analyzer maintains data cubes that contain views of aggregated data. These are summations of workflow behavior over time.



Additional Information:

Process Analyzer Client leverages features in Microsoft Excel.

PivotTable and PivotChart reports

Robust chart creation and manipulation

External data source connectivity

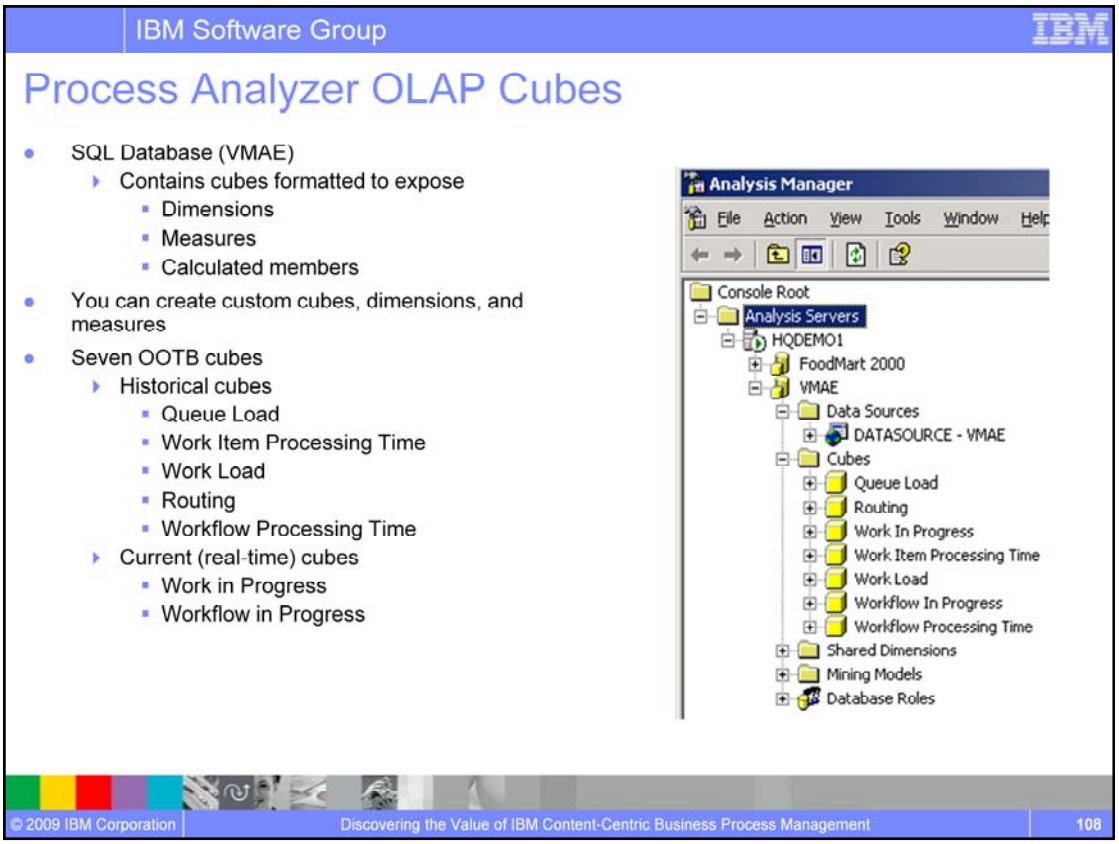
FileNet Process Analyzer client comes with pre-configured Excel Workbooks containing charts that present metrics commonly used in evaluating workflows. The categories of these reports are listed on this slide.

Analysis examples include:

A Regional Car Dealership wants to check on **Sales by District by Car Model** and then to drill down within the **District** to **SalesStaff** to see who is selling the most popular models.

A Distribution company wants to see if any trends are emerging so they construct a CUBE to help analyze **How Many** of **What Products** are going **Where** on **What Truck**.

A large Credit Card provider monitors real time data of **Work Queues** to gauge adequacy of **Human Resource** within different **Bill Processing Centers**. Also,
- Percentage approved/rejected after credit score step (routing cube)
- Number of applications processed per day by user
- Average time to complete entire credit approval process
- Average time to complete entire credit approval process by processing center.



Additional Information:

Users can add custom dimensions and measures to the cubes of the Process Analyzer, as well as create new cubes. This enables the capture of custom business data and facilitates the presentation and manipulation of performance information by business users.

One Legacy Cube Not Used

Workflow Processing Time is a cube used in earlier versions of Process Analyzer, whose functions are now combined with the Work Load cube in this release.

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Process Simulation

What if?

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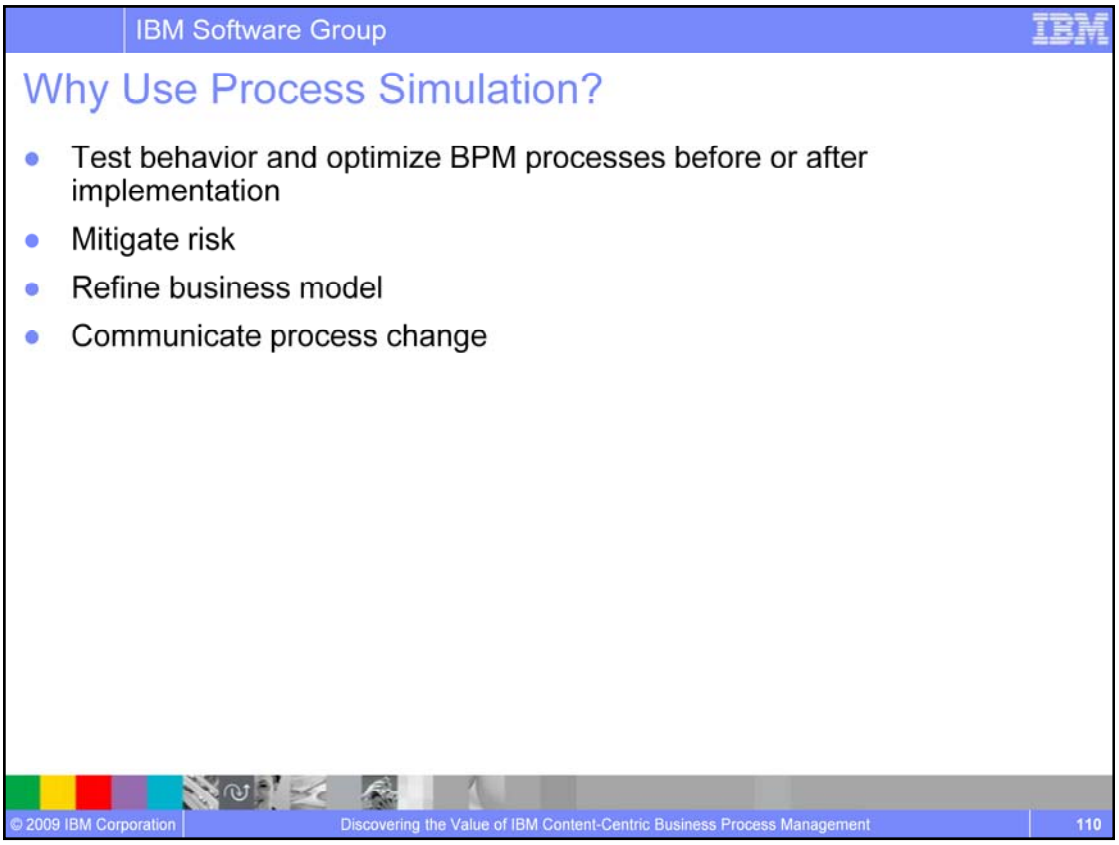
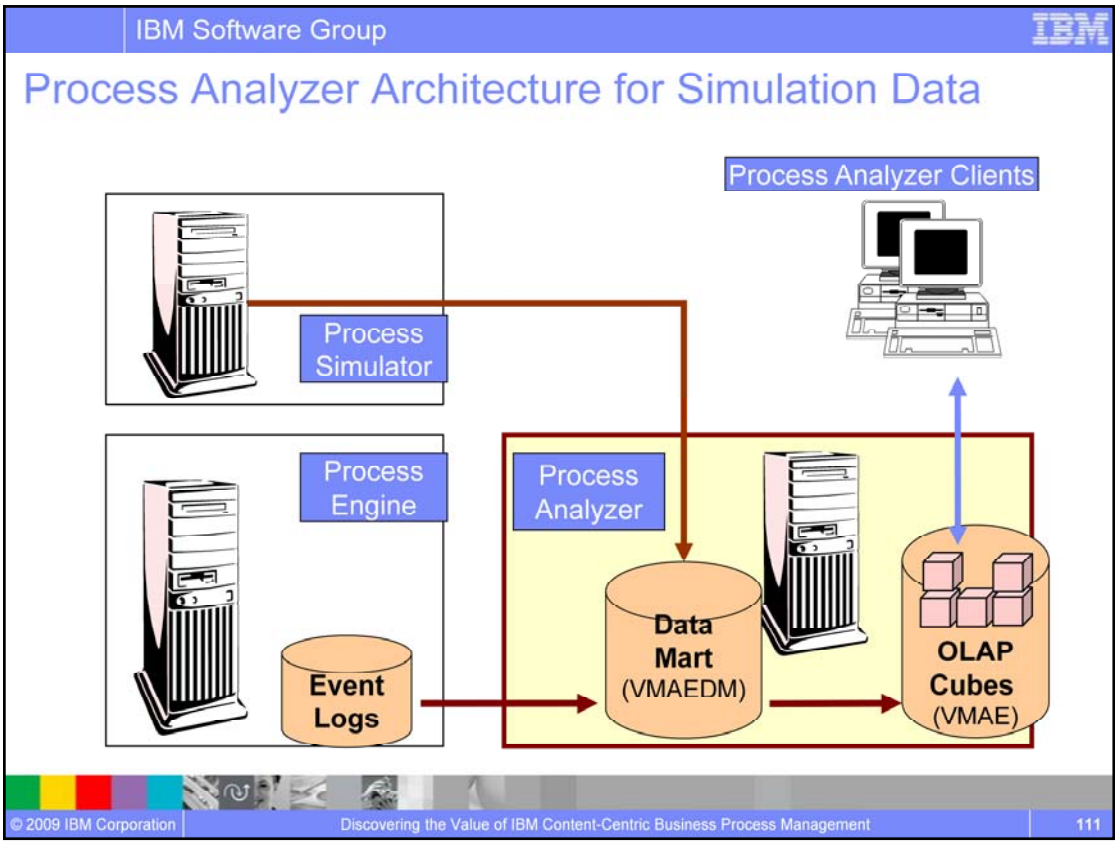


Additional Information:

Using process simulation the business process analyst can investigate process change and test multiple alternatives quickly for better decision making. Using process simulation, you can:

- Identify resource surplus and bottlenecks
- Predict overall costs and cost per procedure
- Test throughput, service response and cycle times

Results from Process Simulator can be used internally in an organization to communicate process alternatives in a graphical way.

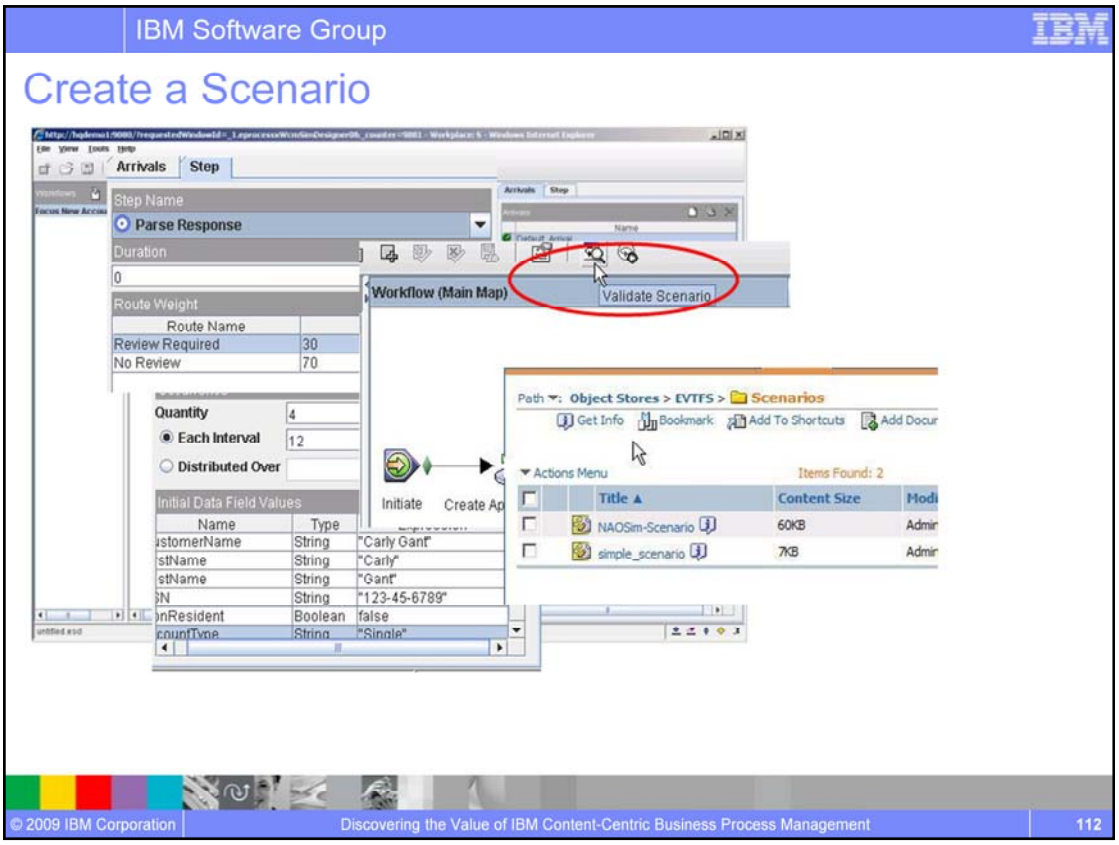


Additional Information:

The Process Analyzer receives data from both the Process Engine and Process Simulator.

Process Simulation data is pre-aggregated during the simulation run and is written directly to the Data Mart fact tables in aggregate form. Once the OLAP cubes are processed, then a PA client can run analysis reports on the simulated data.

There SHOULD BE A SEPARATE Process Analyzer (VMAEDM and VMAE) to avoid possible skewing of production data.



Additional Information:

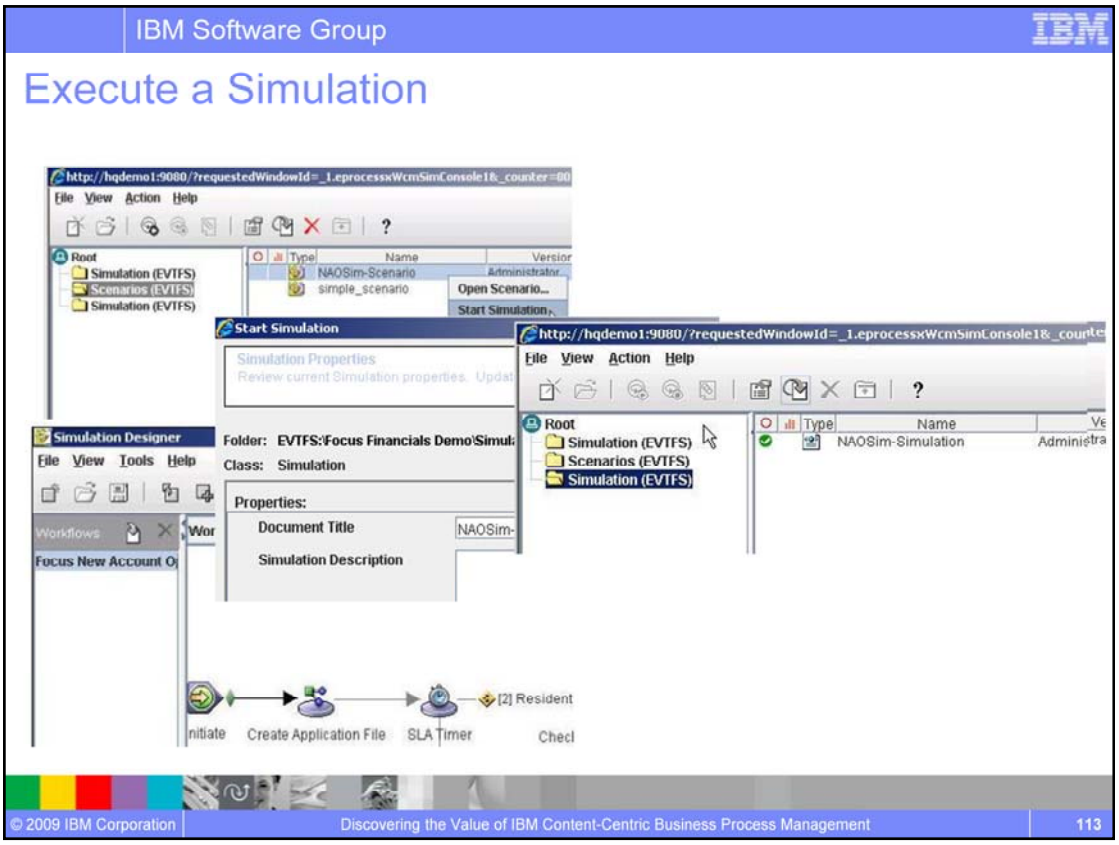
A Business Process assumes live processing where “real” data is provided during workflow processing. A simulation needs to provide static or programmatic values which “simulates” the real world. In Step 1, you create a scenario using **Process Simulation Designer**. The tasks in this step are:

•**Import** a workflow definition that has previously been created in Process Designer. You can import a workflow definition from a local drive, object store, or the Process Engine. You can import multiple workflow definitions, as well as replace workflow definitions in a scenario.

•**Define** the scenario properties, such as work arrival patterns, resources available, work shift, jobs, and simulation duration. Note that there is an option to use actual production arrival information imported from Process Analyzer.

•**Validate** the scenario against the Process Engine isolated region. There is a Validate tool in Simulation Designer to detect errors in the simulation scenario.

•**Save** the scenario to the object store or a local drive. You must save the scenario to the object store in order to run it in the next step.



Additional Information:

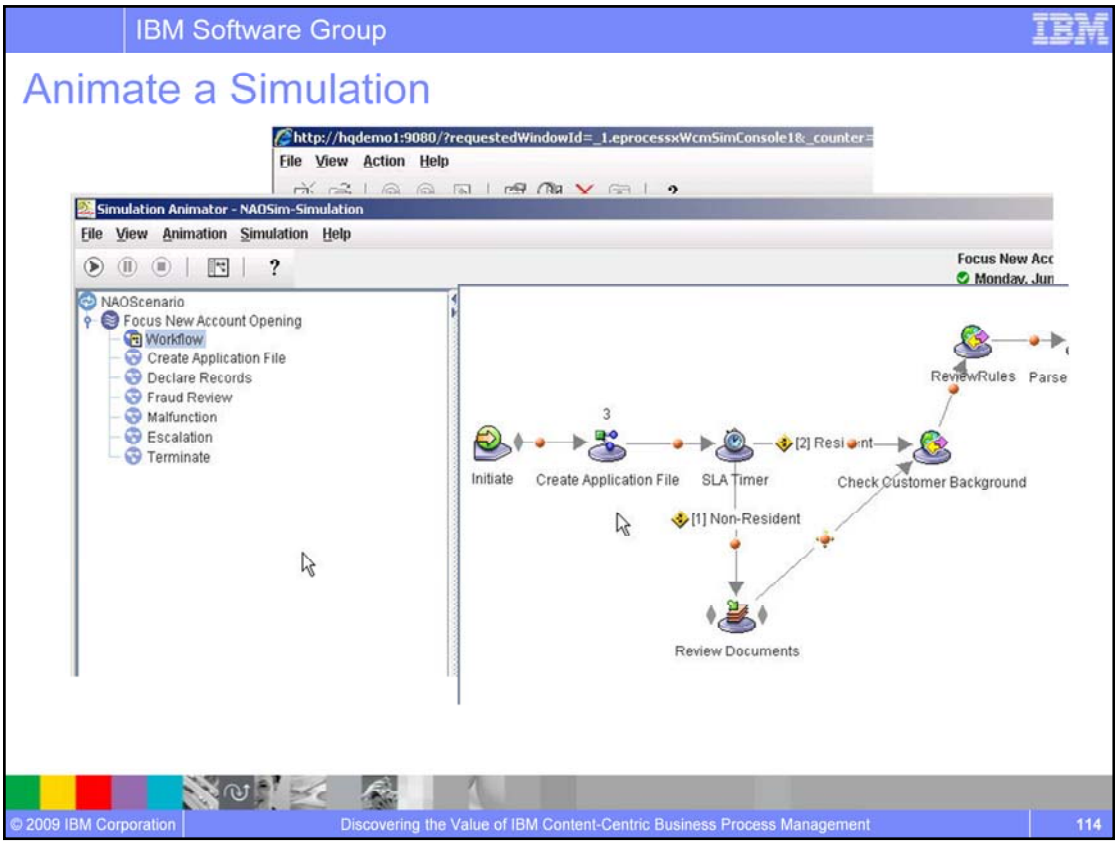
The Scenario contains the parameters for the simulation. Processing the scenario results in a saved object containing the events that will be used for analysis. The Simulation executes on the Process Simulator Engine.

In Step 2, you launch the scenario, create a simulation object and and execute it. The tasks in this step are:

•**Start** the saved simulation scenario from the client application (Simulation Designer or Simulation Console).

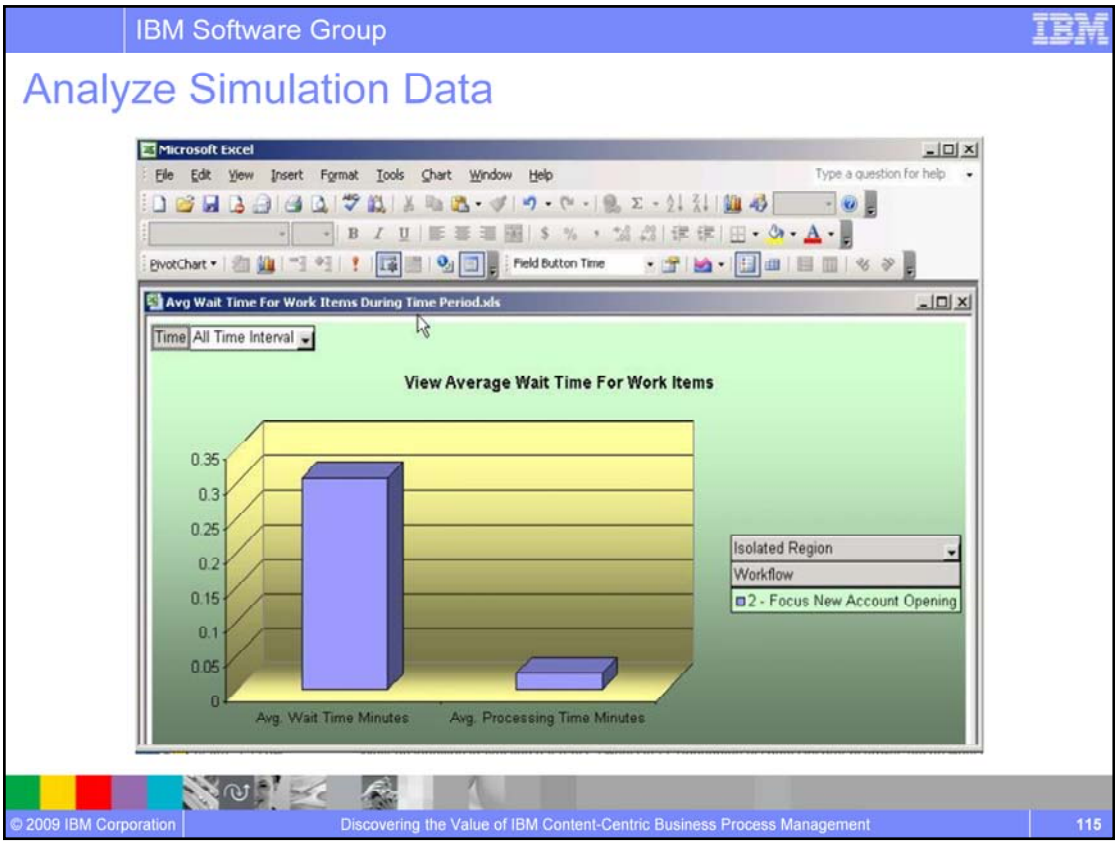
•**Store** the simulation data object in the object store. The simulation data object is created by Process Simulator and stored in the Content Engine object store. An optional feature is reading production arrival statistics from Process Analyzer.

•**Publish** the events generated by the simulation to the Process Analyzer for analysis and report generation. Publishing is optional and is not required for simulation runs. However, in order to produce analytical reports, you must publish the data. Note that the Process Analyzer engine must be running in order for publishing to occur.



Additional Information:

Viewing the animated simulation while the workflow is processing can lead to insights not readily visible in raw data. Generally, through the graphical animation, trends can be observed quicker. Such as seeing that arrivals at certain steps are not diminishing, there is a possible bottleneck.



Additional Information:

Use the Process Analyzer for Simulation Data just as you would for analyzing production data.

- Process the Cubes
- Pivot Tables are connected to the Simulation Process Analyzer

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Lab: Optimize Your Process

Overview

Introduction	Using Process Analyzer and supplied out-of-the-box Microsoft Excel spreadsheets you will to view and generate dynamic chart-based reports based on statistical information gathered from Process Engine. You will then simulate the new account opening workflow using two scenarios which have already been defined.
Lab Objectives	• To observe how Process Analyzer provides dynamic, chart-based analyses of workflow activity, based on information collected from Process Engine or Process Simulator. • To understand how Process Simulator can be used to simulate workflows by performing "what-if" scenarios, providing business analysts with important information that helps streamline business processes.
Exercises	This lab contains the following exercises:

Exercise	Lab Page
Step-by-Step – Process Analyzer	**214-225**
Step-by-Step – Process Simulator	**226-259**

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Lab Summary

- Comments or questions

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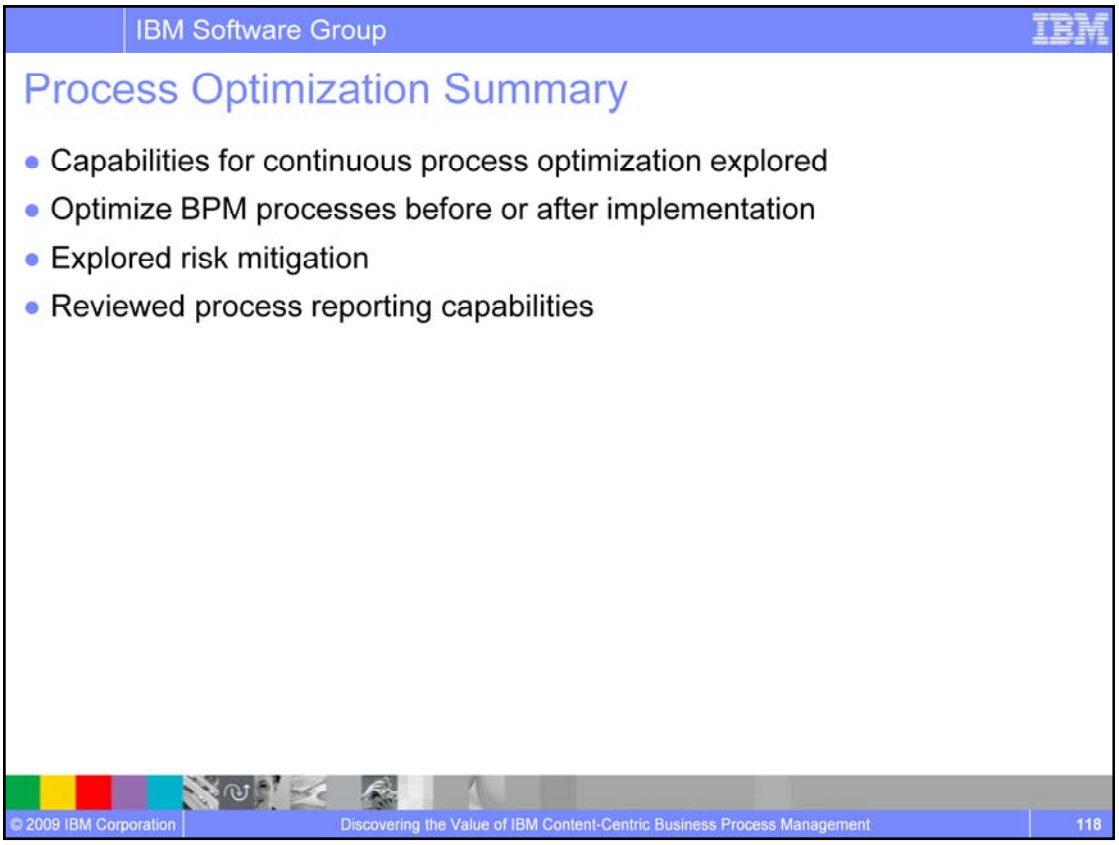

Additional Information:

FileNet Process Analyzer establishes a foundation for continuous process improvement by evaluating business performance, and analyzing productivity, efficiency and cycle time.

•Provides comprehensive and dynamic data delivery by utilizing an advanced data structure that supports high-performance queries.

•Offers a complete range of dynamic reporting options to view and analyze data from a variety of perspectives, including drill down, filtering, rollover, and slice and dice capabilities.

•Empowers business analysts and managers to accurately track the performance of key enterprise processes, respond to changing business demands, and maximize corporate agility.

•Integrates seamlessly into FileNet BPM applications to ensure rapid, real-time reporting, extensible analysis, and the needed perspective and intelligence into process improvement to maximize ROI.

IBM FileNet Process Simulator Provides process simulation with animation and statistics using historical data or “what if” analysis around specific business scenarios, enabling organizations to identify and minimize process bottlenecks, and optimize business processes.

•Reduces the risk of implementing mission critical processes by designing the optimal processes before putting them into production.

•Leverages the tight integration of Design, Analysis and Simulation environments, to continuously tune business processes for optimal performance.

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Agenda continued

- Process Optimization
  - Process Analyzer and Process Simulator
  - Lab - Process Analyzer
- **Performance Management**
  - Business Activity Monitor
- Discussion - Next Steps
- Summary

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Performance Management

Improve Process and Performance Management

An IBM Proof of Technology

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Performance Management Outline

- Business Activity Monitor
- WebSphere Monitor

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How Do I Gain Insight to Business Performance and Respond to Critical Events As They Occur?

Typical Solution	Problems
Spreadsheets, SQL queries & local databases	Inconsistency, lack of security and poor user productivity; reports analyze only one database at a time unless data is exported and manipulated manually
ERP/CRM reporting and analysis	Reports off one system only; most companies have numerous disparate systems that require multiple access views & reports
Homegrown solutions	Starts out cheap but gets more expensive with every expansion and evolution; high maintenance costs

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Additional Information:

Business users & managers want:

•Access to and effective utilization of information across the enterprise

•To manage exponentially growing info, data & content

Over the years, numerous approaches have been used in an attempt to deliver real-time visibility into the operations of the business. These approaches had varying degrees of success.

•Spreadsheets, SQL queries & local databases: Inconsistency, lack of security and poor user productivity; reports analyze only one database at a time unless data are exported and manipulated manually

•ERP/CRM reporting and analysis: Reports off one system only; most companies have numerous disparate systems that require multiple access views & reports

•Homegrown solutions: Starts out cheap but gets more expensive with every expansion and evolution; high maintenance costs

That is, they couldn't provide:

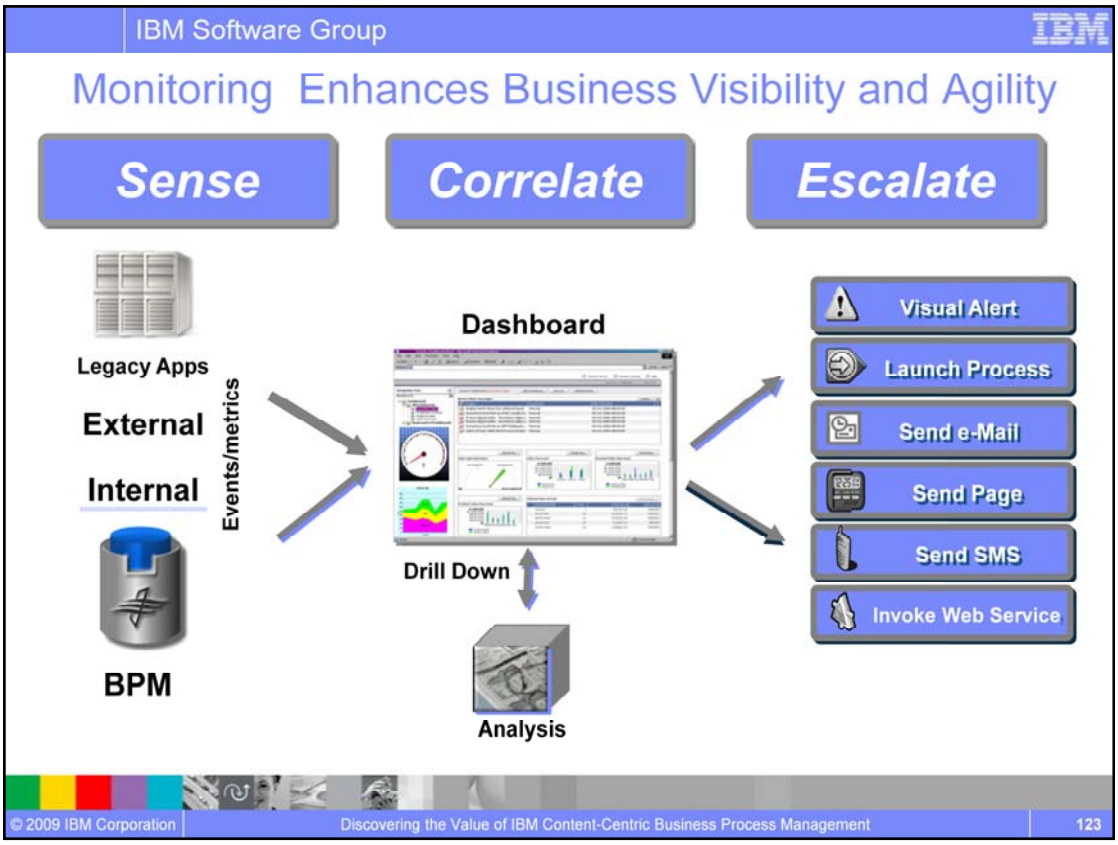
•True real-time visibility

•Sophisticated alert/action mechanism

•Metric Correlation from multiple data sources

•Business user friendly and configurable User Interfaces

•Support for complex Business Rules



Additional Information:

FileNet BAM easily integrates with **operational applications and legacy systems** from other areas in the customer's environment via standard interfaces allowing for the creation of Key Performance Indicators (KPIs) that are more meaningful and useful to the business. **BAM receives and retrieves event and context data through agents:** processes that know how to take external data and put it into a FileNet Business Activity Monitor format. **Agents may run in the application server environment, or may be external to it,** as shown in this diagram. A simplification of the architecture can be seen here.

•When we talk about performance management, what we are talking about is the ability to help an organization to:

•Sense – Correlate- Escalate. The intent here is to **take direct action and <u>Resolve</u> whatever issue or opportunity may exist.**

The Opportunity:

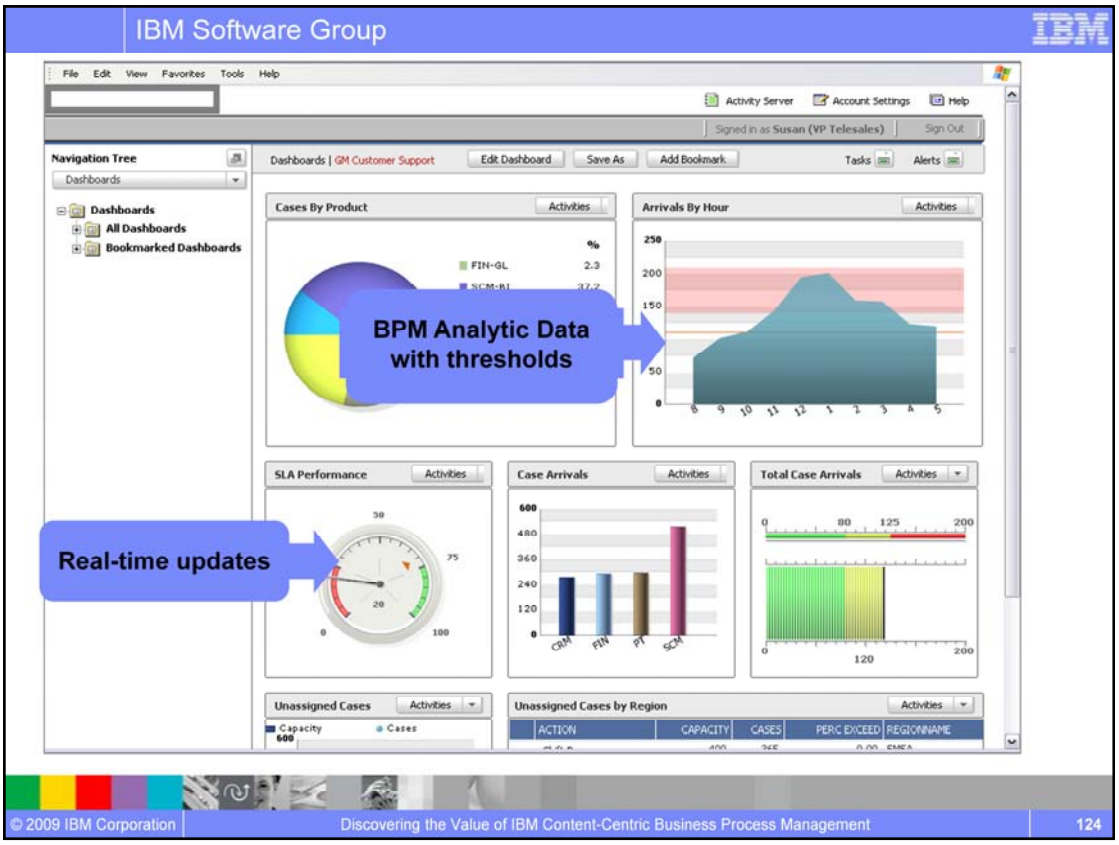
•Ability to gather metrics from External sources and view KPI dashboards in real-time (tailored to role)

•Allow other events/actions or notifications to be launched automatically **– increasing organizational agility**

•Provide true operational performance management (BPM+BAM+Analysis/Reporting +Simulation)

•Provide continuous process improvement and greater operational/organizational agility

•Make better decisions, faster



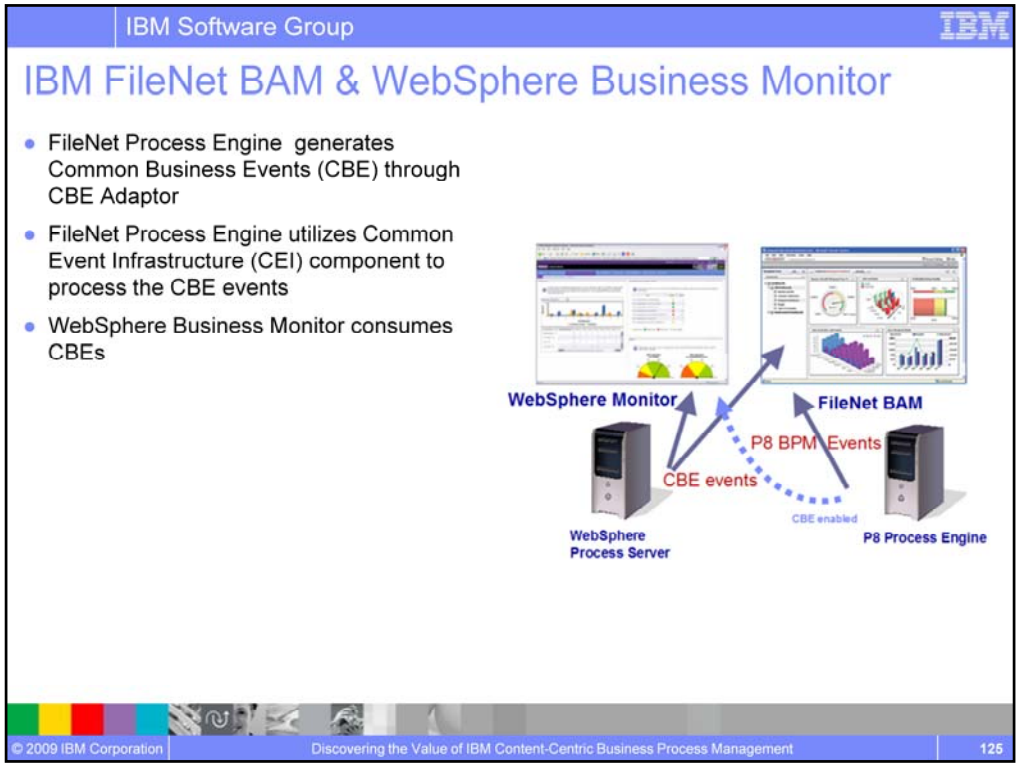
Additional Information:

The FileNet BAM includes an operational dashboard that provides continuous, up-to-date visibility into business operations and key performance indicators (KPIs). This allows users to quickly react to changing market conditions and make timely decisions. The operational dashboard can be used to acknowledge alerts or to automatically initiate actions—such as invoking a FileNet Business Process. Each user can personalize his or her dashboard with the metrics and alerts that are relevant to their job function.

The dashboard is the User Interface to the BAM product. This is a Web-based, business user friendly User Interface that users can easily select different metrics to monitor, and the graphical representation of those metrics is also user definable. Users can also create business rules to define thresholds for the KPI's they are interested in. In addition, if a threshold is violated for a user definable period of time, an automated action can be specified. This action can invoke Web Services, generate an email, and launch a FileNet Business Process to handle the exception.

KPI's are represented as graphs or tables which get updated in real time, so when a metric changes in the BPM system, the dashboard will be updated accordingly.

Each Dashboard is secured by user role. Users log into the dashboard and they will then only be shown metrics and dashboard objects that they have access to.



Additional Information:

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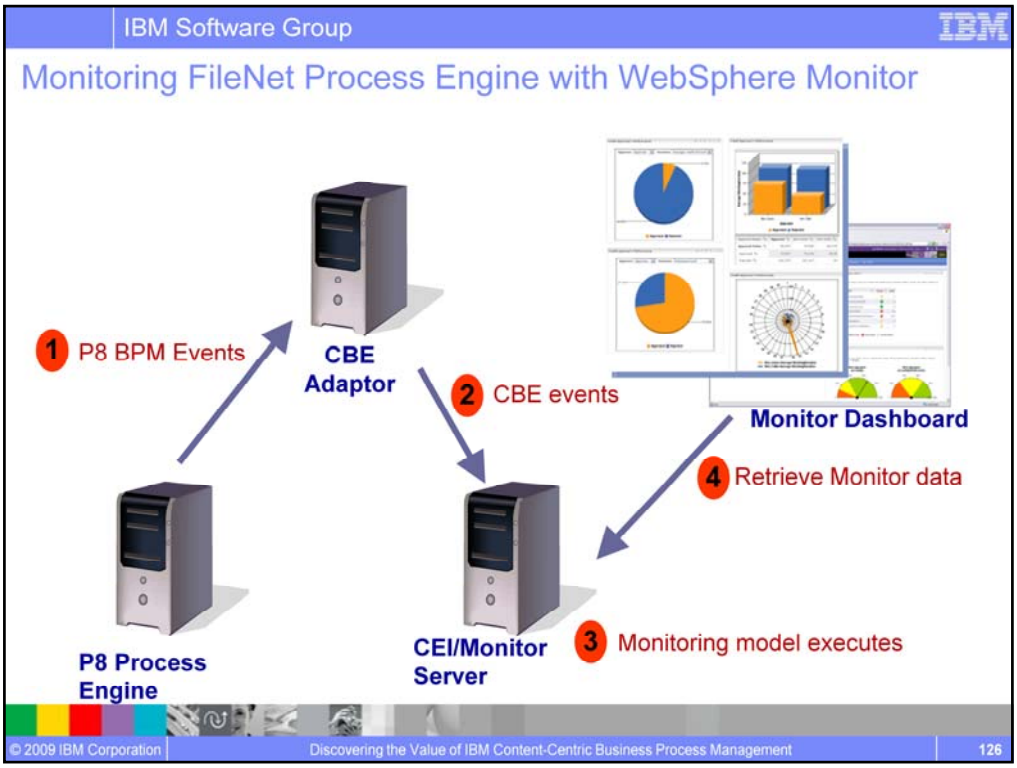
Business Process Manager 4.0.2

•Interoperability with WebSphere Business Modeler (WBM)

•Log events to Common Base Event infrastructure for consumption by WebSphere Business Monitor



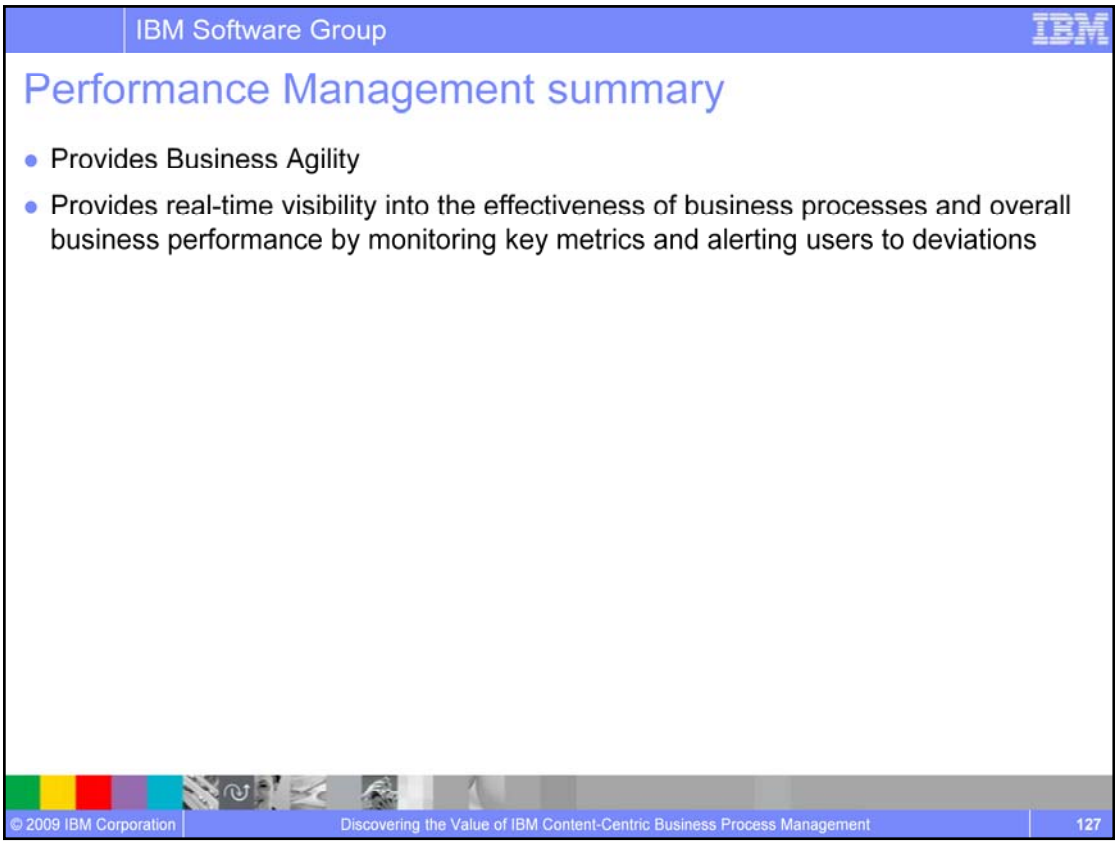
Additional Information:

CBE Adaptor:

Retrieve PE events

Transform to CBE events

Transmit CBE events to the Monitor server



Additional Information:

•Provides real-time visibility into the effectiveness of business processes and overall business performance.

•Provides customizable dashboards, workflow and analysis tools to help business managers identify issues and respond quickly and effectively to them.

•Optimizes organizational responsiveness, reduces risk and lowers total cost of ownership.

•Increases responsiveness and agility by providing real-time visibility into the effectiveness of business processes and overall business performance.

•Helps various business stakeholders identify issues and respond quickly and effectively to them through customizable dashboards, workflow and analysis tools.

•Provides visibility by collecting and correlating data from various sources, including IBM FileNet Process Engine, WebSphere Process Server, and other third party applications.

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Agenda continued

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- **Discussion - Next Steps**
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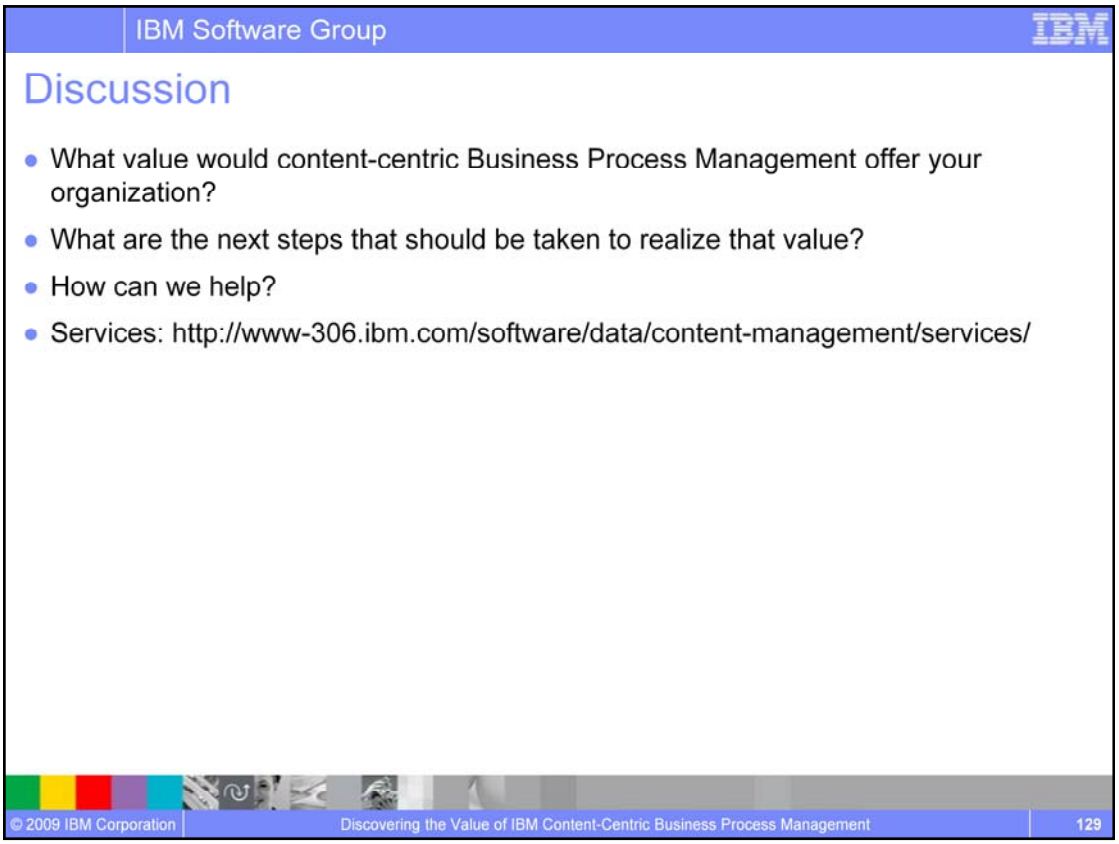
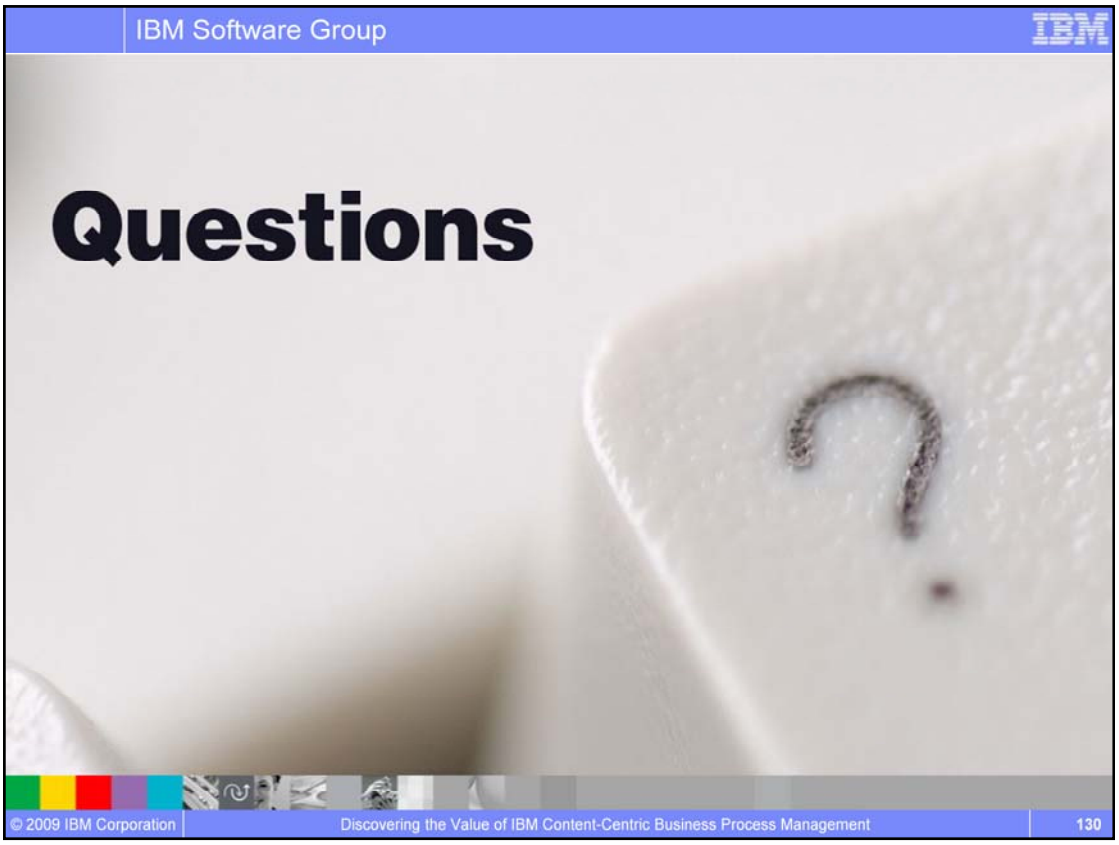


Additional Information:

Outline what can be done: formalize requirements, identify pilot, attend education, engage services for architecture, etc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Session summary

So, have you discovered the value of IBM Content-Centric Business Process Management?

An IBM Proof of Technology

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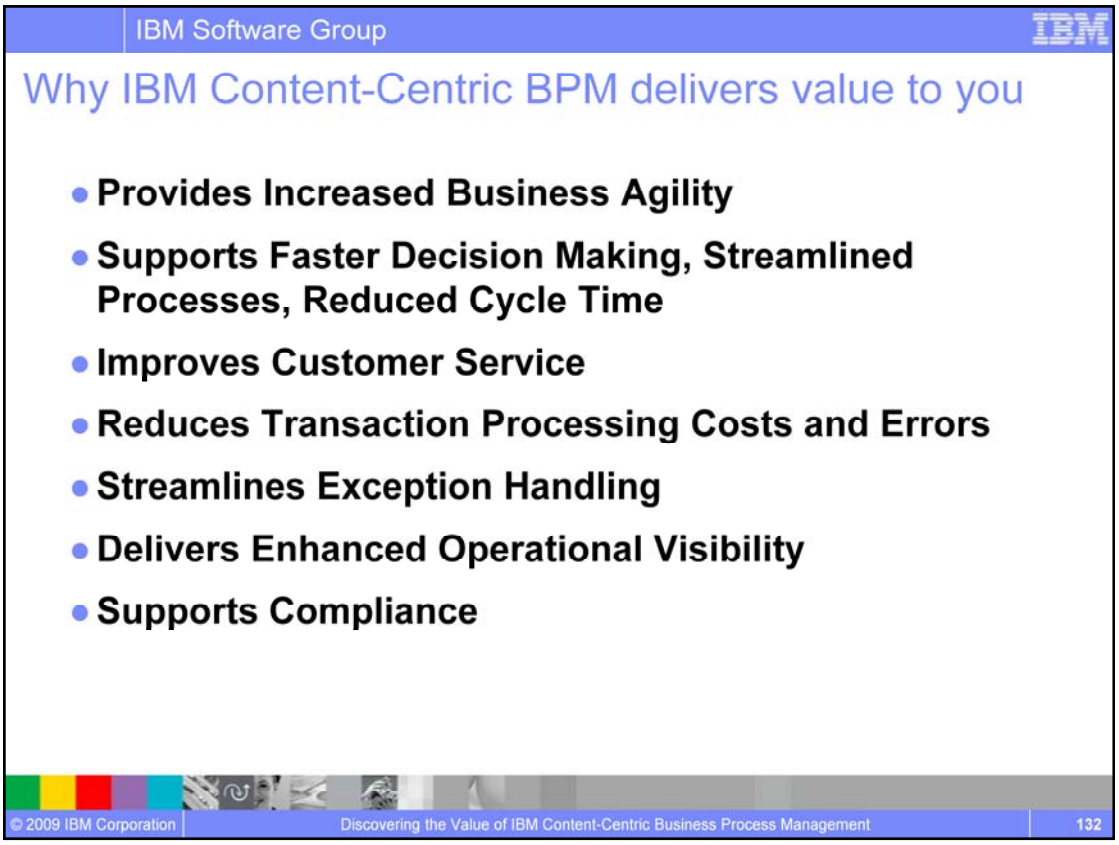

Additional Information:

Content-Centric BPM empowers greater levels of control over process performance and provides improved visibility to maximize agility and enable speedy, appropriate reactions to business events as they occur.

IBM FileNet Business Process Manager provides a competitive advantage by facilitating better productivity and cost efficiencies, mitigating risk and supporting compliance. Ultimately, this enables IBM FileNet BPM customers to drive increased business performance.

•The ability to adjust processes on-the-fly offers companies increased business agility to address opportunities as market conditions changes. However, it is not enough for an organization to merely redefine its business processes; it must optimize these processes continuously. Processes supporting millions of transactions and thousands of users can be quickly deployed or modified as needs warrant.

•Process automation reduces the need for human intervention in routine or low-risk business decisions. This eliminates both the cost and potential for errors associated with human-based workflow and allows companies to apply expert human resources when and where they add the most value to the decision-making process. Companies can then realign their resources to focus on higher revenue-generating activities

•Automating processes reduces cycle time. The faster you can process a business transaction, the more transactions you process. The more transactions you can process, the more business you can service. Faster decision-making not only shortens cycle time, it reduces handling costs – and ultimately increases profitability

•No matter how well designed a process may be, there will always be work exceptions. An organization's exceptions-handling process is a major determinant of overall service. If an exception is handled expediently, it can present an opportunity to win customer loyalty. Through disciplined exception handling, companies can further differentiate themselves from their competition

•BPM enables operational visibility, which is critical to both business agility and continuous process improvement. This enhanced operational visibility helps companies respond quickly to changing market conditions, so they can leverage windows of opportunity, minimize competitive threats, ensure regulatory compliance and make better decisions faster.

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Why we at IBM deliver the best BPM value to you

- **Deep understanding of your need and strong vision**
- **Broadest product line to enable enterprise ECM**
- **Clear leadership in Content-Centric BPM**
- **Clear market leader in ECM Compliance**
- **ECM Partner application portfolio second to none**
- **Commitment to open environments**
- **IBM global support and services**

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Session summary

- Described our use of “Content-Centric” and “Business Process Management (BPM)”
- Identified and used the components involved in an IBM Content-Centric BPM solution
- Visualized the value of such a solution to your organization
- Planned your next steps

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Reference materials

- IBM FileNet BPM overview and selected resources
  - http://www-306.ibm.com/software/data/content-management/products/process.html
- IBM FileNet BPM papers
  - http://www-306.ibm.com/software/data/content-management/library.html
- IBM FileNet BPM Training
  - http://www-304.ibm.com/jct03001c/services/learning/ites.wss/us/en?pageType=course_list&subChapter=4633&subChapterInd=S&subChapterName=FileNet+Business+Process+Manager&chapter=5037&chapterName=Enterprise+Content+Management
- IBM Enterprise Content Management Website
  - http://www-306.ibm.com/software/data/content-management/

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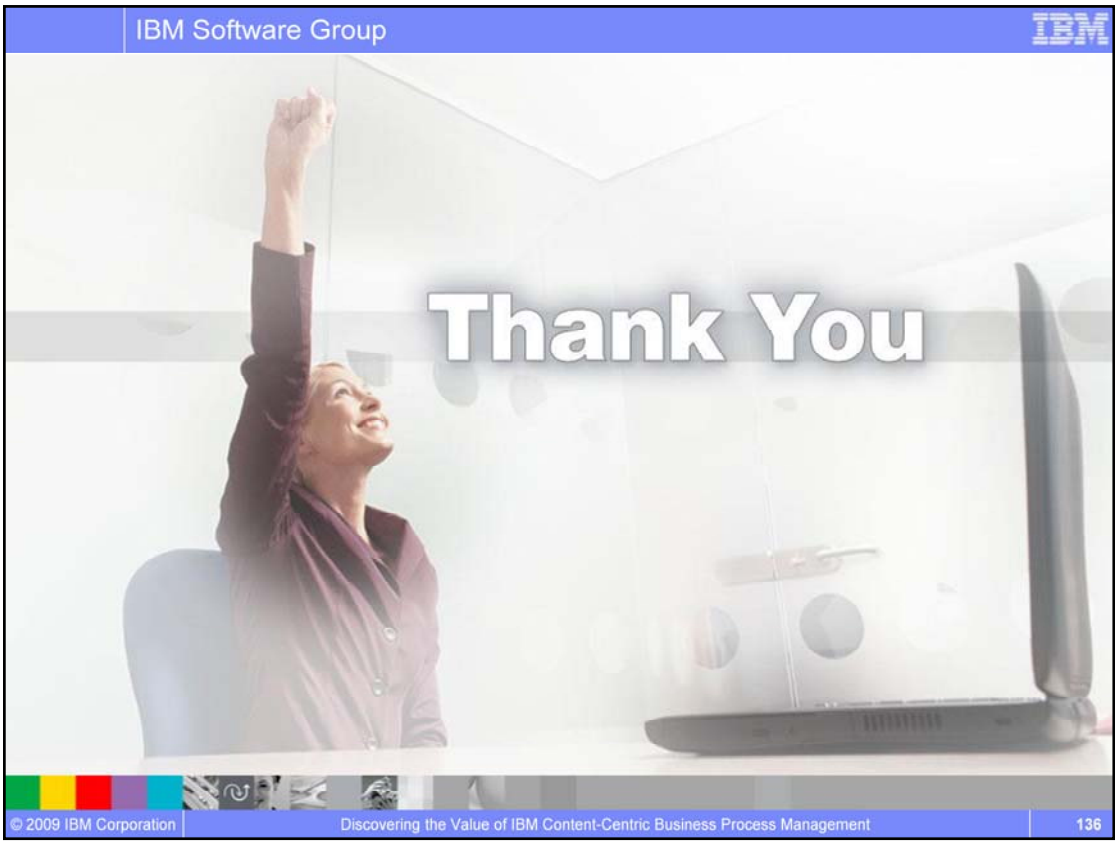
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Supporting Material

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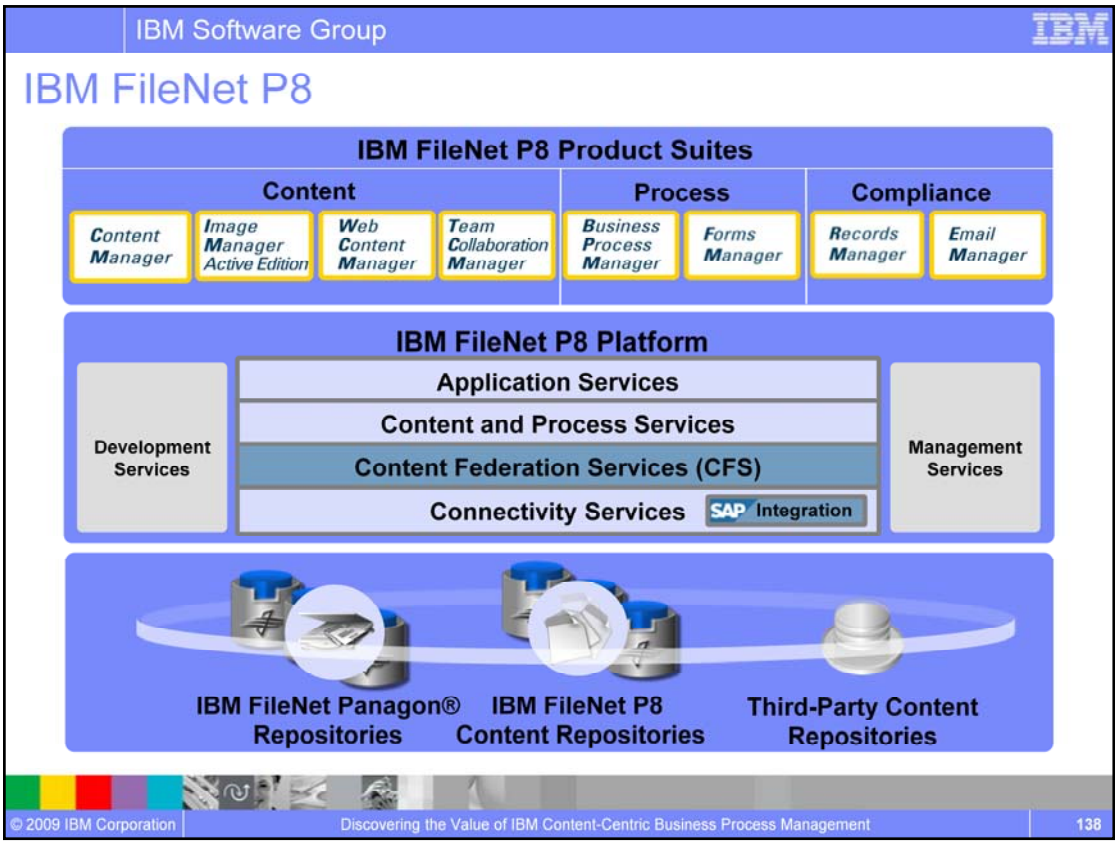
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