



IBM ECM UK UserGroup 2008

Connecting the ECM Community

IBM BPM 4.5 Update & Strategy

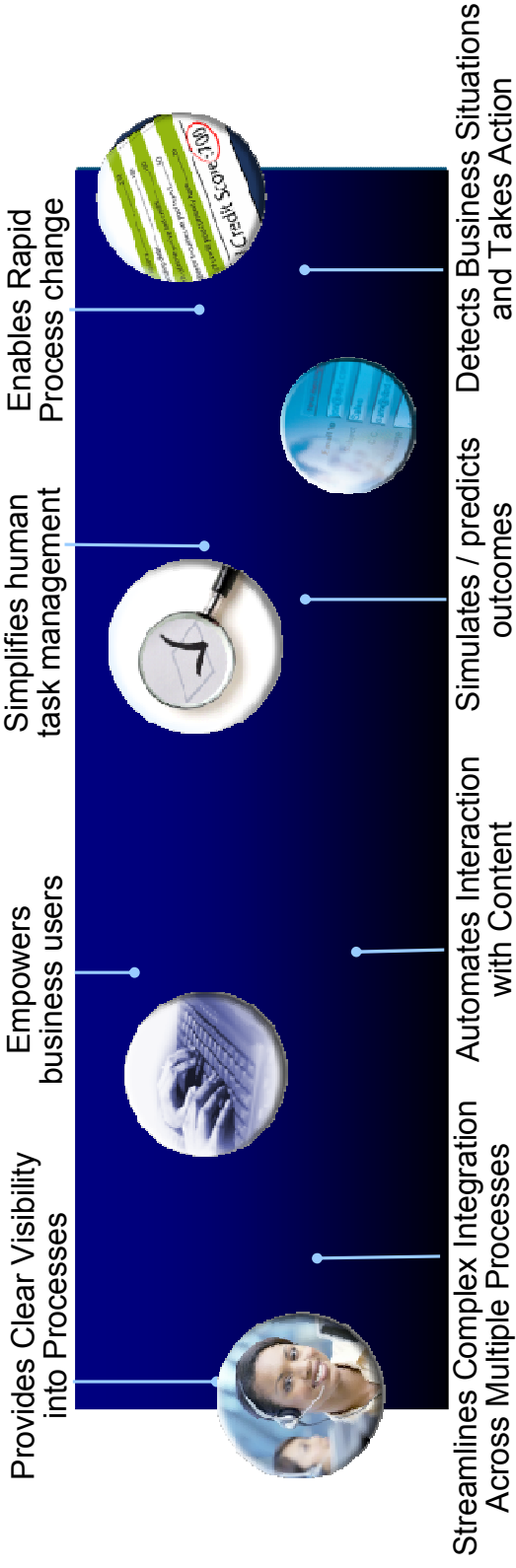


Outline

- Intro to BPM
- Challenges – IT & Business
- Intro to Mashups
- What is new in BPM 4.5
 - BPM for the Business
 - Other features

BPM allows businesses to change and innovate through their business processes

BPM solves common business challenges . . .



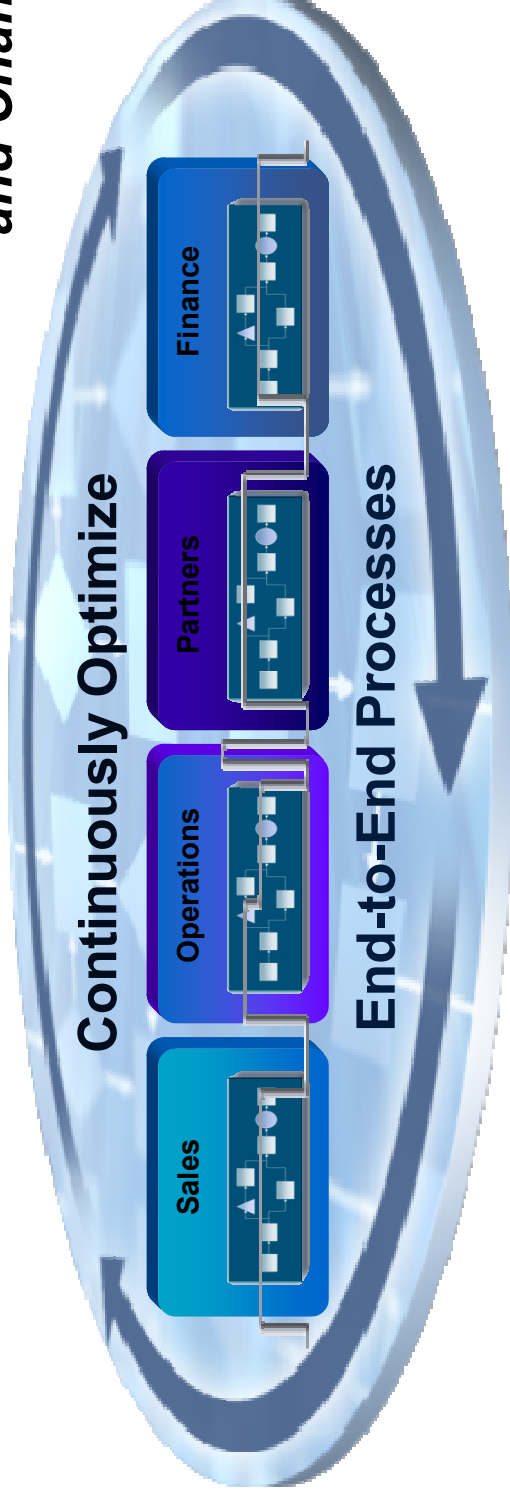
BPM includes



IBM BPM Empowers You To Embrace Change and Continuously Optimize Your Business

*Model and
Simulate*

*Rapidly Deploy
and Change*

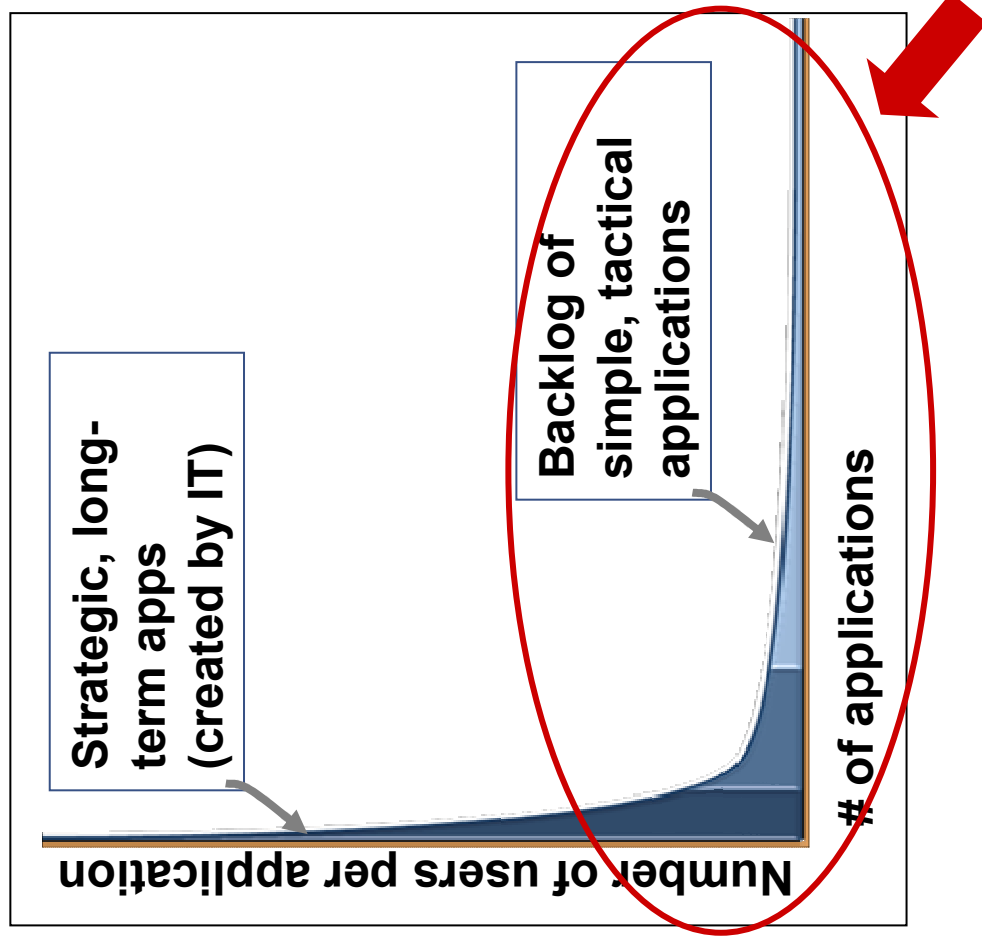


Monitor, Predict and Act

Outline

- **Intro to BPM**
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- **Intro to Mashups**
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Unmet Needs



Business Challenges

- Lack of agility – IT can't respond fast enough to business requirements
- Spreadsheet “apps” hard to manage, share, keep current
- Silo-ed, outdated, inaccurate, information

IT Challenges

- IT is backlogged with too many business requests
- Costly to build, maintain, and integrate apps
- Underground or “shadow” IT
 - Security violations
 - Loss of information

This is where most decisions get made and where most users spend their days

Business Expectations of IT Are Changing

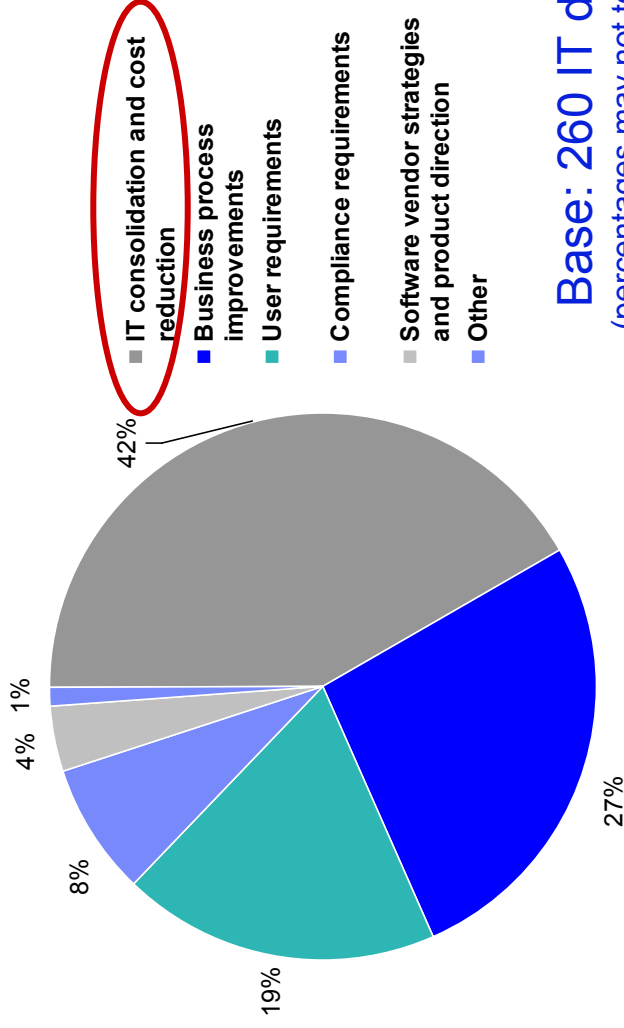
- **Allow rapid prototyping**
- **Supports improved communication and requirements sharing**
- **Involve LOB in the solution**
- **Provide Self-service capabilities**
 - Minimize “shadow IT”
 - “Do it yourself” IT will be expected by ‘millennial’ generation weaned on Facebook
- **Have IT become more relevant to the business**
- **Get information into motion regardless of which silo it happens to sit in**



Cost Drivers

IT cost pressures will continue to drive innovation

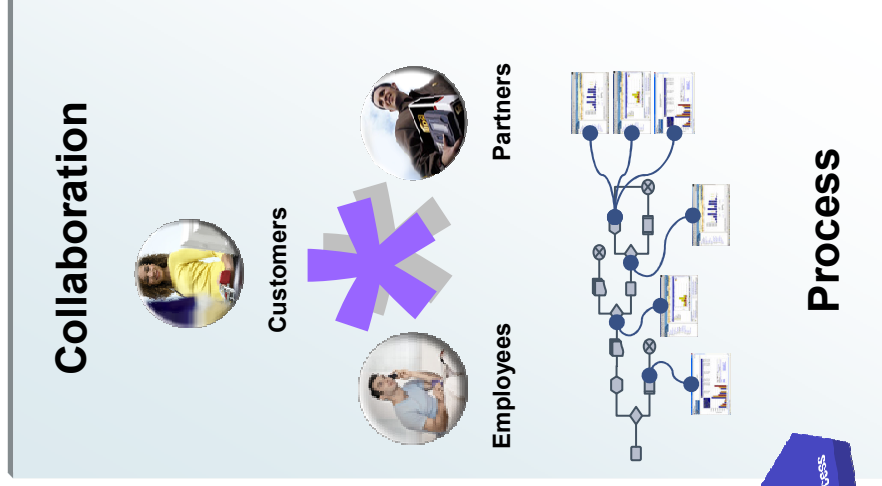
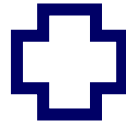
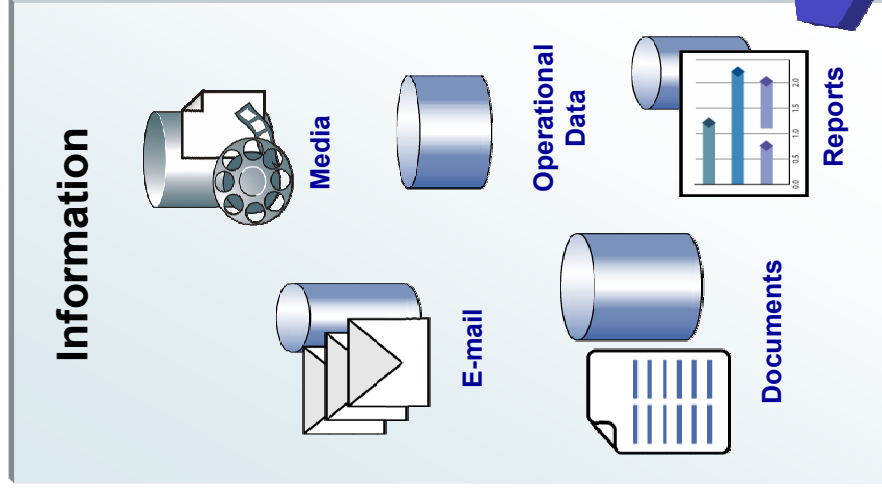
“What do you think will be the *one most important* driver behind this trend [of convergence of content management, collaboration, portal, and office productivity]?”



Base: 260 IT decision-makers
 (percentages may not total 100 due to rounding)

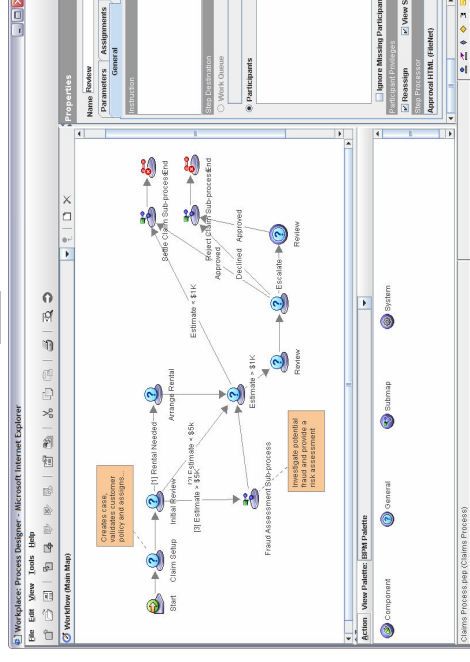
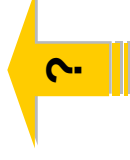
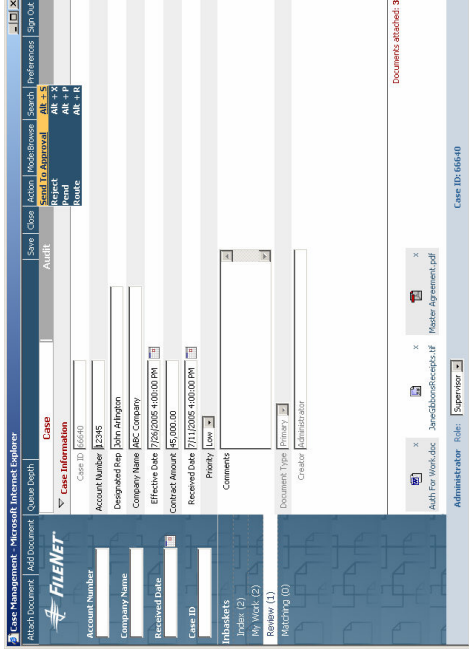
Source: February 2007 US And UK Information Workplace Online Survey Forrester Research 2008

Innovation!



Challenge with Content- & Human-centric BPM

- **A process model is not an application**
- **Building custom user interfaces can be costly**
- **Desired objectives**
 - Reduce development cost
 - Accelerate speed of deployment
 - Achieve repeatability to minimize Total Cost of Ownership
 - Improve quality by minimizing custom code
 - Balance configuration with extensibility



Your Questions

- **How can I shorten time to build applications & reduce TCO?**
 - *Leverage BPM, Web2.0, SOA (asset reuse)*
- **How can I increase and support collaboration to drive innovation?**
 - *Enable business participation & collaboration with IT*



Process-Information Challenge

- How can I provide applications that deliver Information On Demand to decision makers of a process?

**Not in the
right place.
Delete?**

**Information
Silos**

**Volume
& Variety**

**Business
Velocity**

47% of users
**don't have
confidence**
in their information

59% of managers
**miss
information**
they should have used

42% of managers
**use wrong
information**
at least once a week

Our answer....



Agile ECM in P8 ‘Sonata’

- Realize time to value by accelerating the delivery of ECM & BPM solutions

Why: offering objective

Enable better collaboration between business & IT users to deliver solutions

Decrease cost & effort of developing ECM and BPM solutions

Minimize steps and tools required to create and update solutions

What: offering feature

Provide “Document and Diagram Mode” for business analysts

Leverage Web 2.0 Mashups & widgets for faster application layout

Consolidate tools & add configuration features in Process Designer

Provide end-to-end ECM and BPM solutions across application development stages for multiple roles



Business User



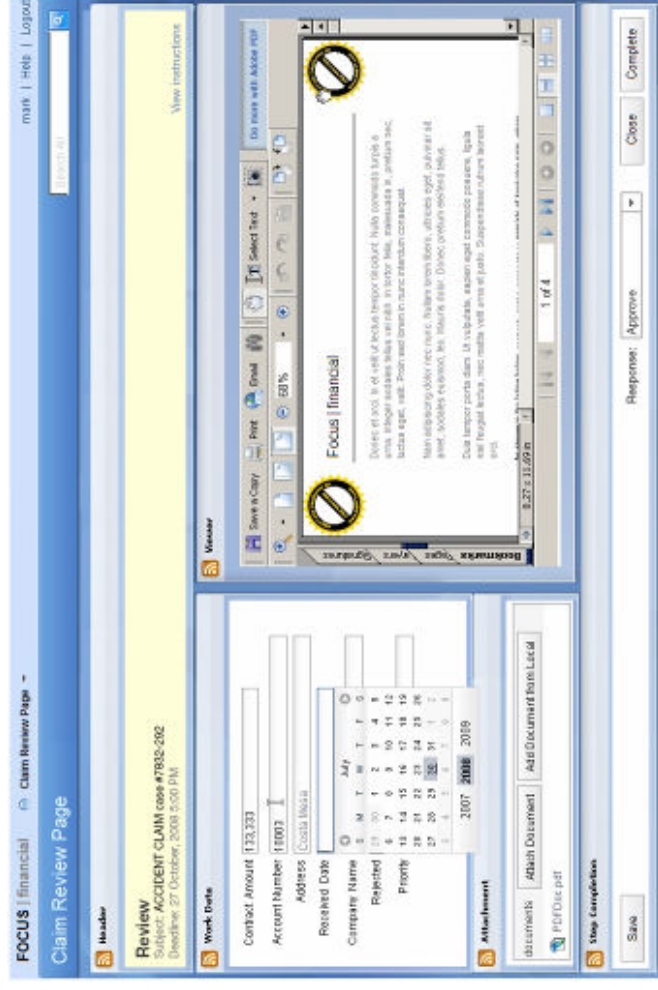
Business Analyst



IT Developer

Agile ECM: BPM for the Business

- Leverages easy to use IBM Mashup to combine IBM ECM & 3rd party widgets into dynamic, context-sensitive, information-on-demand UI
- IBM ECM Widgets come pre-wired; just drag, drop and go
- 3rd party widgets can be easily wired in using an intuitive point & click interface
- **Role-based in-baskets** provide users with personalized views into work & content
- IBM FileNet eForms as an embedded step processor



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What is a Mashup?

A light-weight Web application created by combining information or capabilities from more than one existing source to deliver new functions & insights

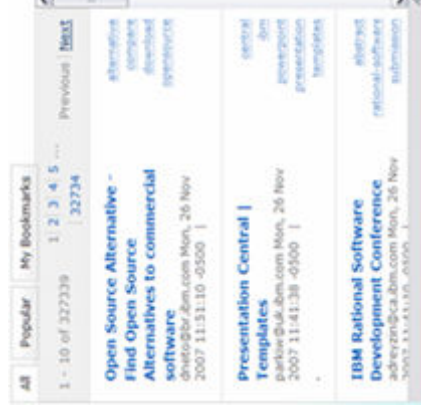
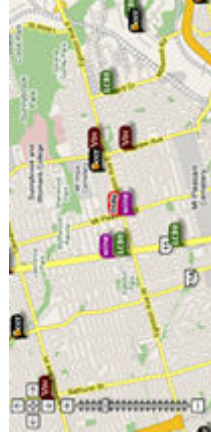
- Rapid creation (days not months) with little technical skills
- Reuses existing capabilities, but delivers new functions + insights
- Often mixes internal and external sources



An Enterprise Mashup Platform allows business users and IT to create, deploy, modify, and share web apps by assembling information & capabilities from multiple sources without coding.

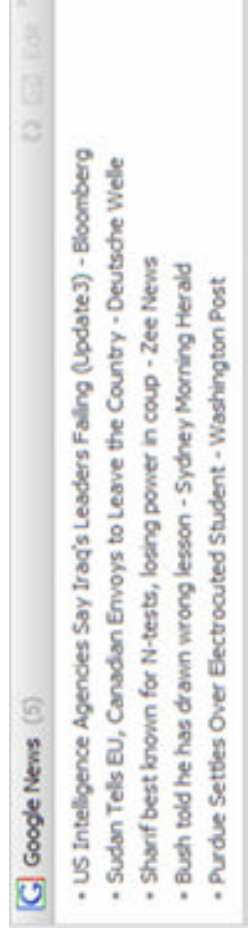
What is a Widget?

- A small application or piece of dynamic content that can be easily placed into a Web page
- May be written in any language including HTML
- “Mashable” widgets pass events, so that they can be wired together to communicate
- May be called gadgets, blocks, flakes



What is a Feed?

- A web feed is a data format used for providing users with frequently updated content
- Users can subscribe to RSS or ATOM to read or subscribe to via the feed readers in browsers
- Emerging as a common way for organizations to expose existing enterprise data to be consumable
- Can be created from enterprise, departmental, personal sources like Excel, databases, or the Web



Rapid Response – Large Aerospace Company

Select a location

Enter airport search criteria:

City: Los Angeles
 State: CA
 Radius (in miles): 50
 Min. Runway Length: 9000

Show all airports

Search

View functioning airports

Open Airports

Airport Name	ICAO	Runway
LOS ALAMITOS AAF	KSLT	1
LOS ANGELES INTL	KLAX	1
ONTARIO INTL	VOYT	

View details for runway to assess fit with aircraft needs

Runway Details

Length	Width	Surface type
10285	150	CON

Visually assess nearest airport for proximity



Airport Details

Airport Name	Location	ICAO	Latitude	Longitude	Elevation
LOS ANGELES INTL	06	KLAX	33.942536	-118.408075	126

NOTAM Messages

Source_id	Account_id	Area_description	Notam_id	Part
K	KL	KKL, CLEVELAND, OH, US, (224245N, 326383W) [CLE]	5/999	1/1 Thu
K	KL	KKL, CLEVELAND, OH, US, (409104N, 831007W) [CLE]	3/877	1/1 Thu

Ad Hoc Research - Adjust Inventory to Grow Sales

The screenshot displays a web-based dashboard for 'My Mashup'. The main content area features a product catalog for 'DISONS' with images of mobile phones and a navigation tree including 'Catalog', 'Electronics', 'Digital Cameras', 'Accessories', 'Phones', 'N55-P', 'N61-P', 'N76-P', and 'Accessories'. On the right, two 'Bar Chart' widgets show monthly data for 'Total' sales and 'Total' inventory. The top chart shows high sales in summer months (July, August, September), while the bottom chart shows low inventory levels during the same period. Three callout boxes provide analysis: one notes that summer sales are very low, another notes that inventory is very low at that time, and a third notes that research data on models, customer reviews, and phone models carried in store in summer should be used to adjust inventory.

Research data on models, look at customer reviews to see if need to change which phone models carried in store in summer

Observe that summer sales numbers are very low

Observe that inventory is very low at that time

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FileNet BPM 4.5 (Sonata) – Other Features

- **Integration with IBM Content Manager (CM8)**
 - Activate CM8 content
 - CM8 Content operations exposed to BPM

P8 BPM

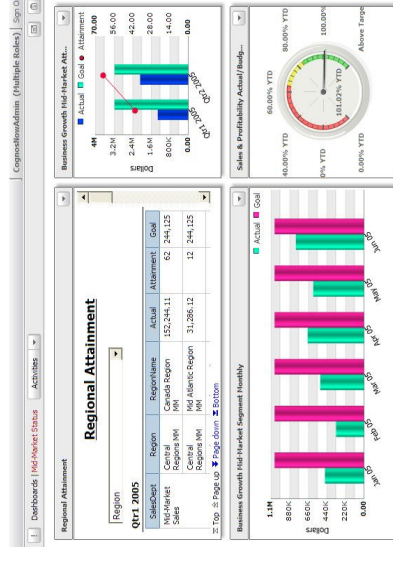
P8 CM

CMv8

• Upgrade to a new version of Cognos Now BAM

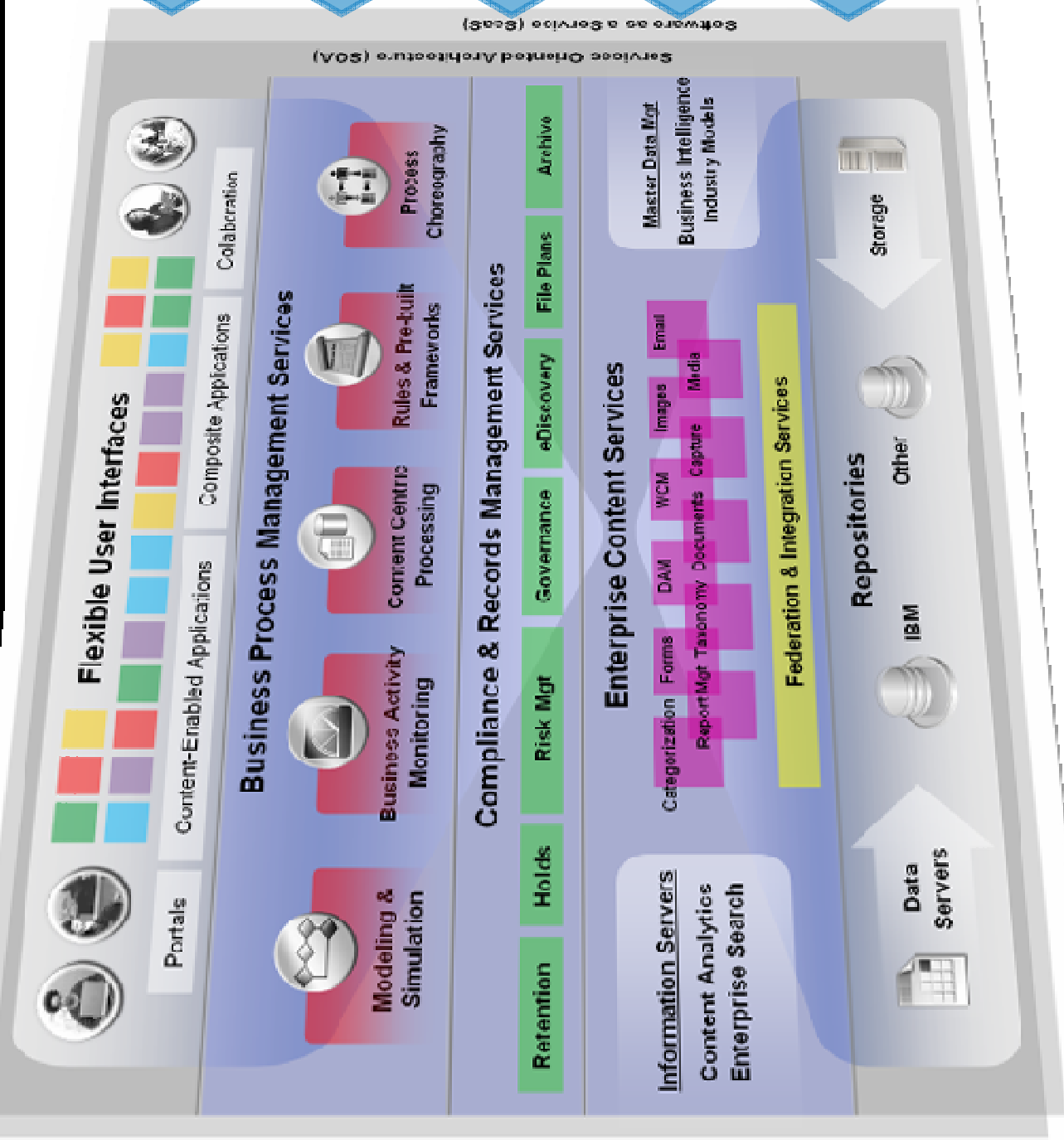
• Improved consumability

- Simplified installation
- Enhanced upgrades
- Simplified deployment of BPM objects between P8 environments



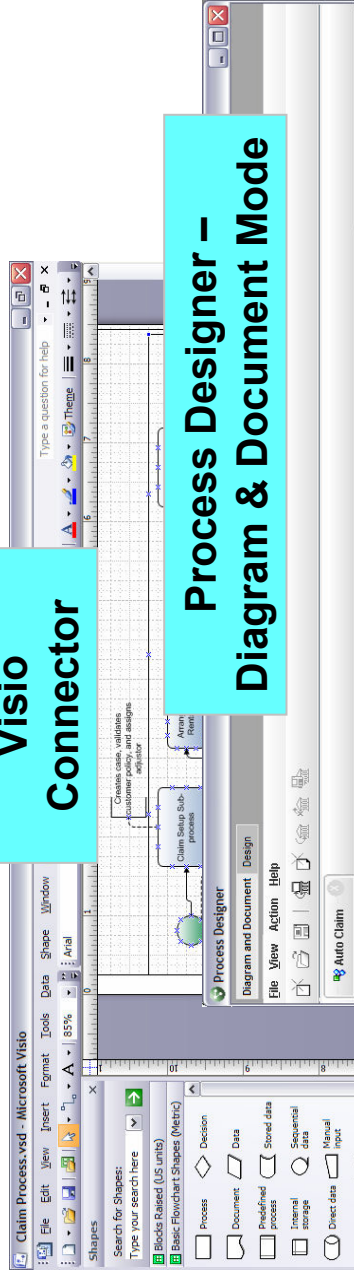
- **Bundle of IBM DB2 & WebSphere App Server (WAS) with FileNet CM & BPM for free**

IBM ECM Product Vision

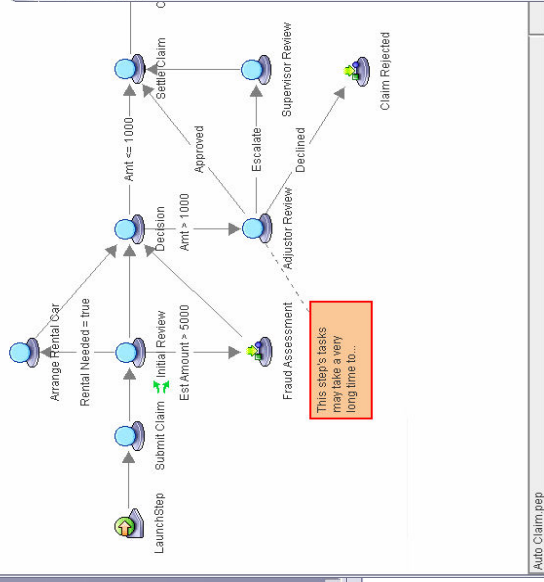


Modeling, Design & Simulation

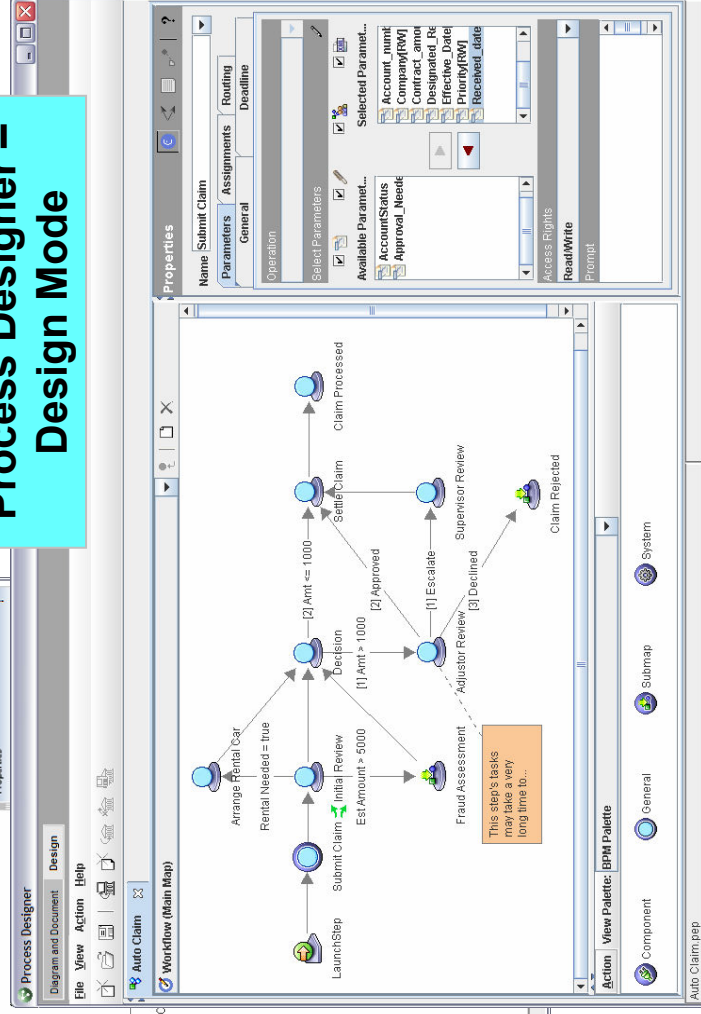
Visio Connector



Process Designer – Diagram & Document Mode

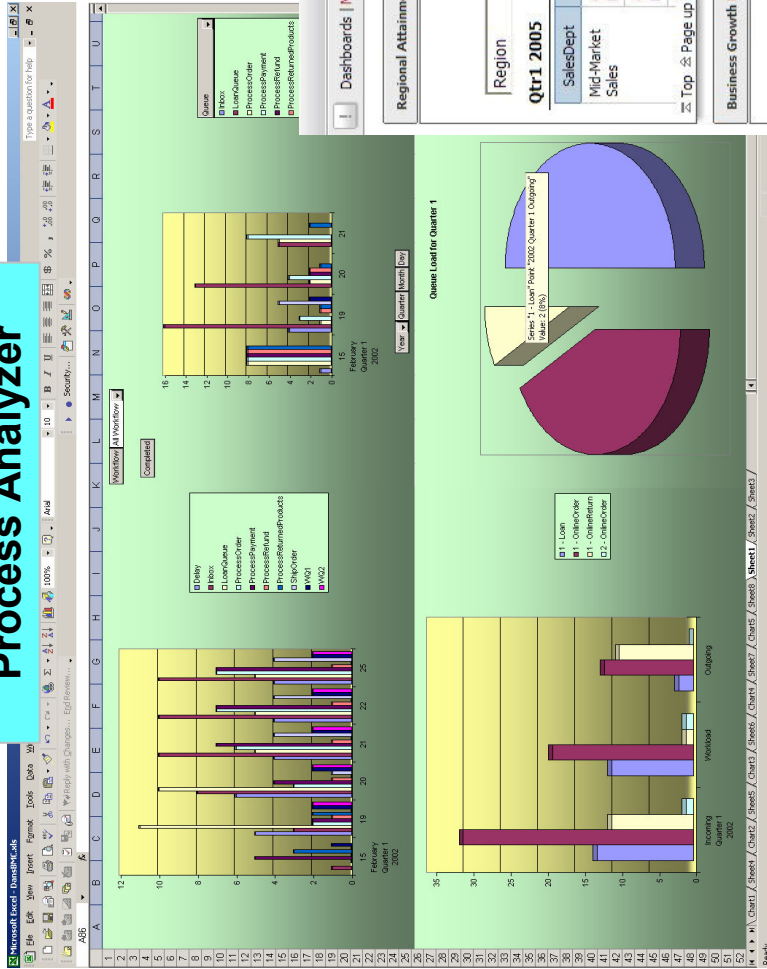


Process Designer – Design Mode



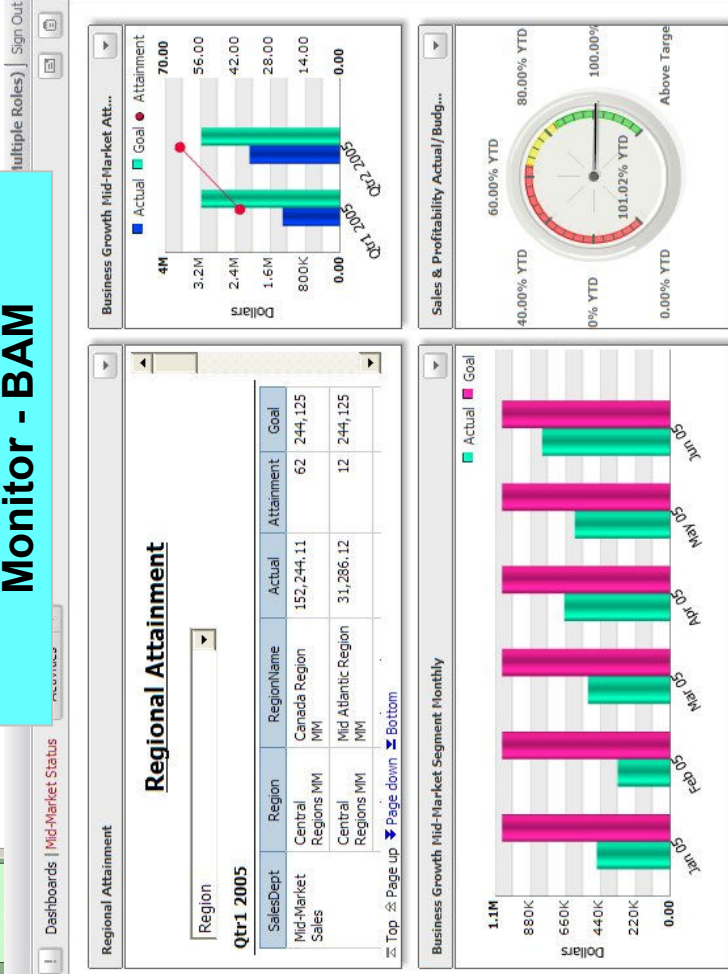
Process Analytics, Reporting & Monitoring

Process Analyzer

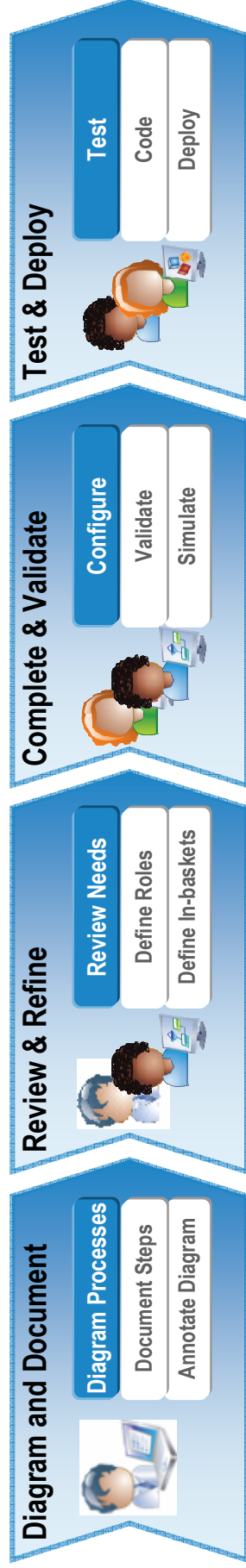


Upgrade to
Cognos Now 4.3

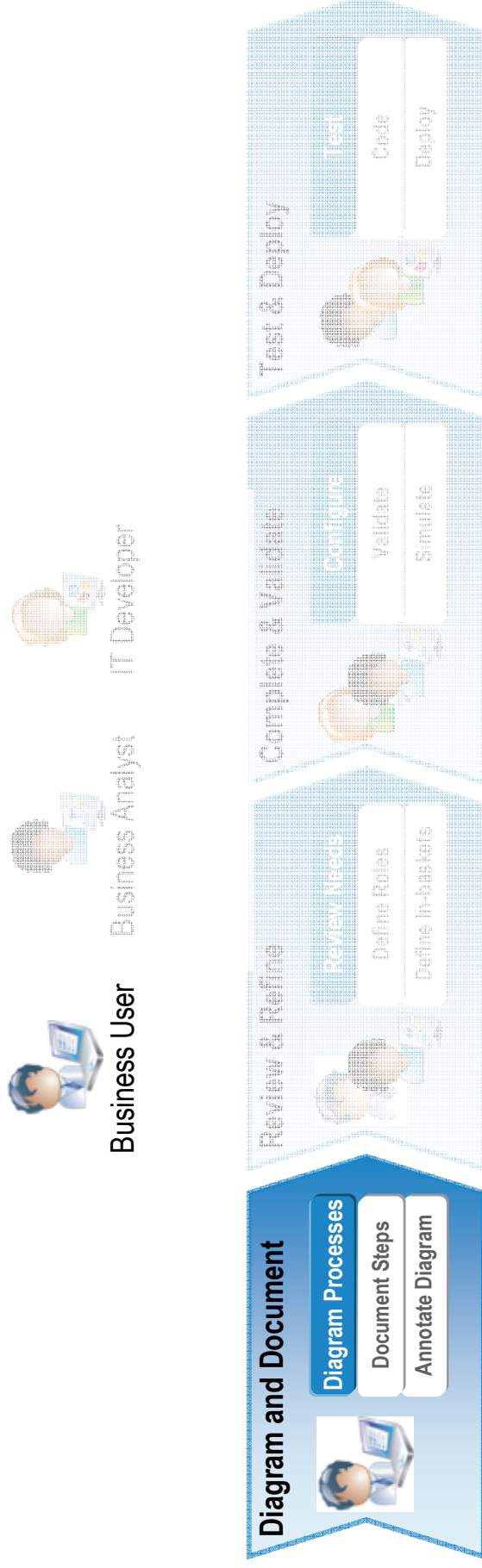
Business Activity Monitor - BAM



BPM for the Business – App Dev Stages



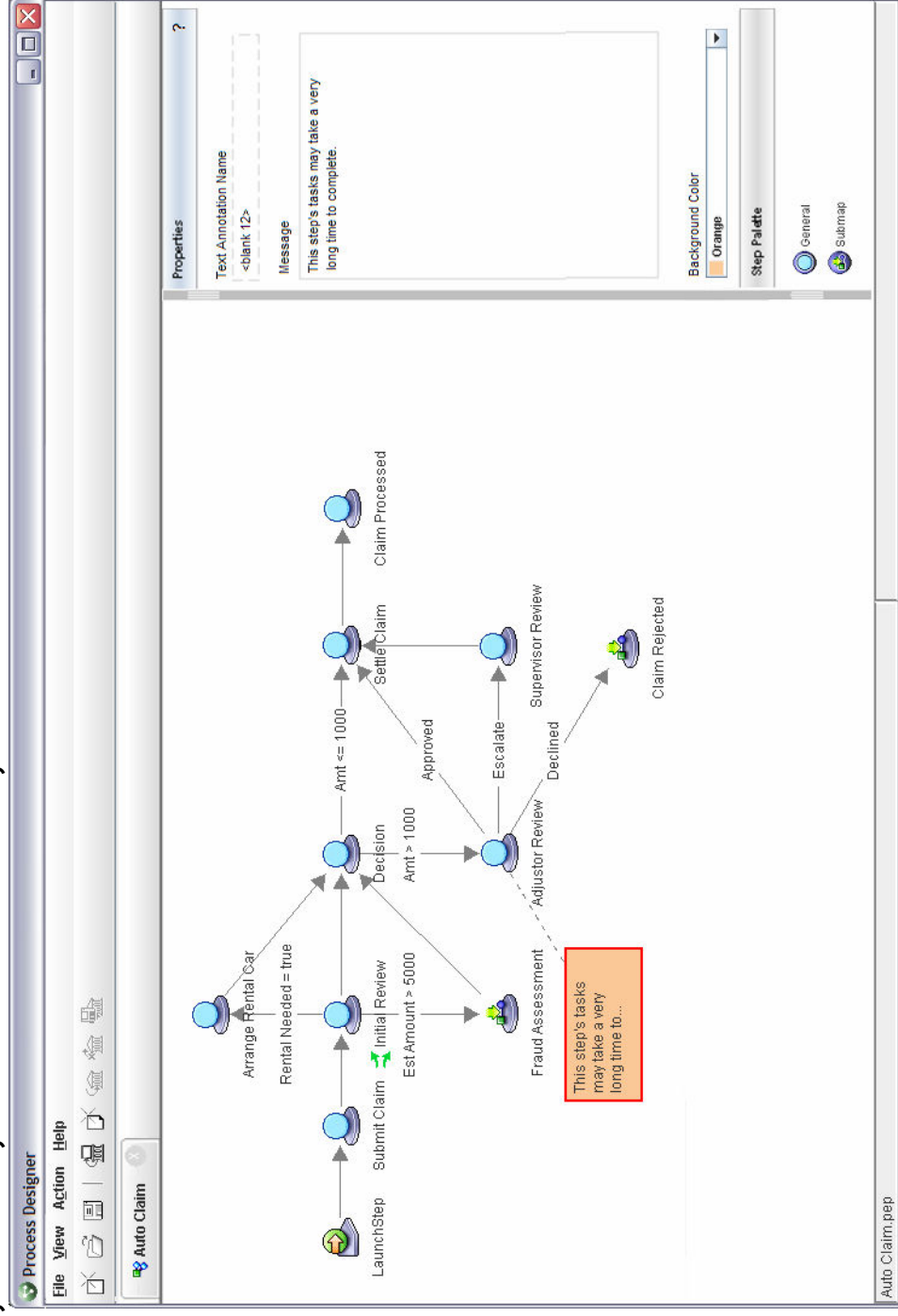
Stage 1: Diagram & Document Mode for Business User



- Enables a business user to easily draw out their processes without having to worry about the technical details behind them
- Controlled by user access rights, hides most of the more complex configuration user interface

Process Diagram & Document Mode for Business User

- Define activities, routes, and annotations, roles?



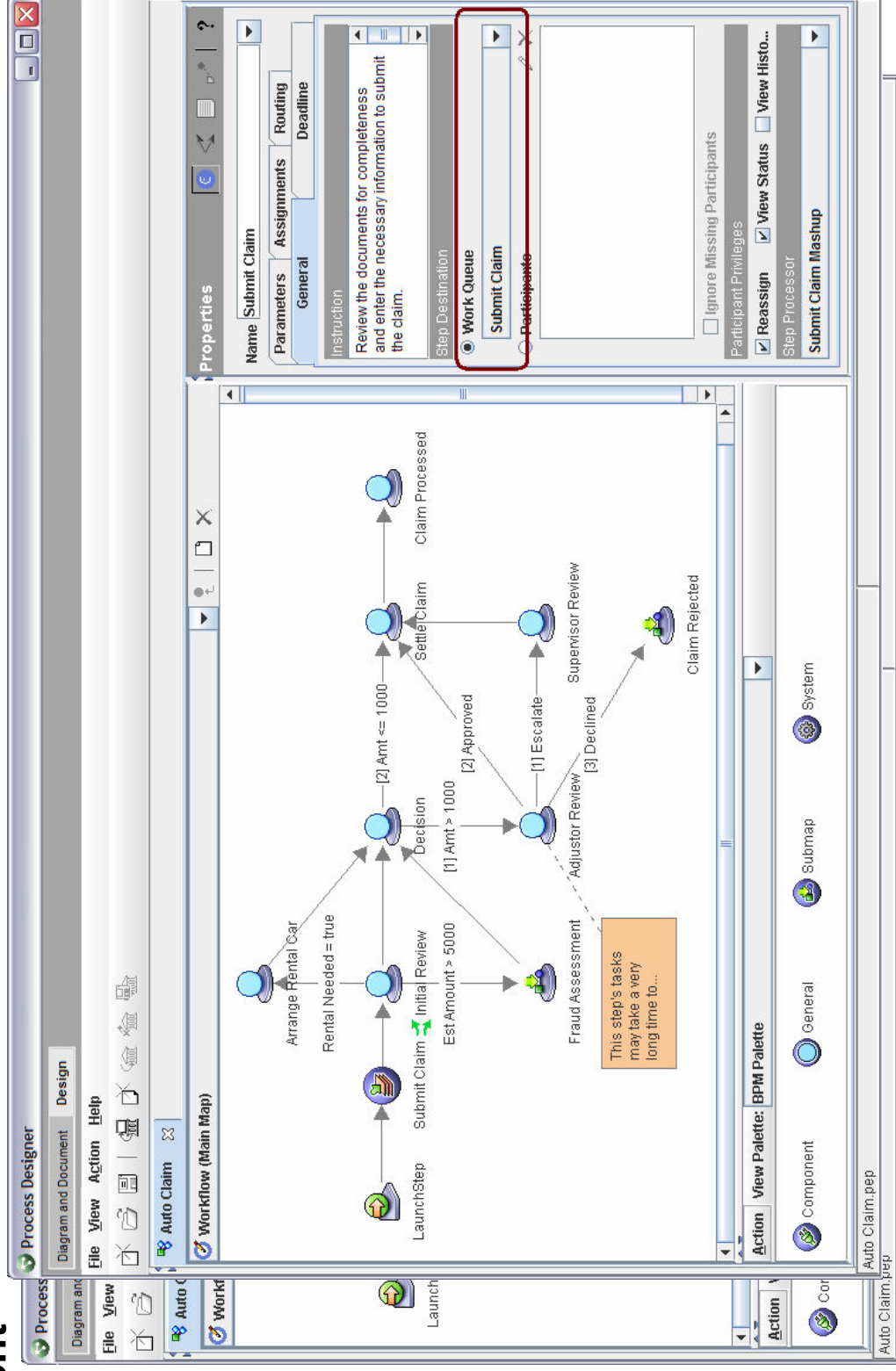
Stage 2: Process Design Review and Refine



- **Business analyst switches the diagrammed model to Design mode which exposes all the capabilities of the Process Designer**
- **Access to the Design mode is controlled by user access rights**
- **Enable an iterative approach where the same process diagram can be again opened by the business user in the Diagram mode (no export / import required)**
- **Promotes collaboration among stake holders**

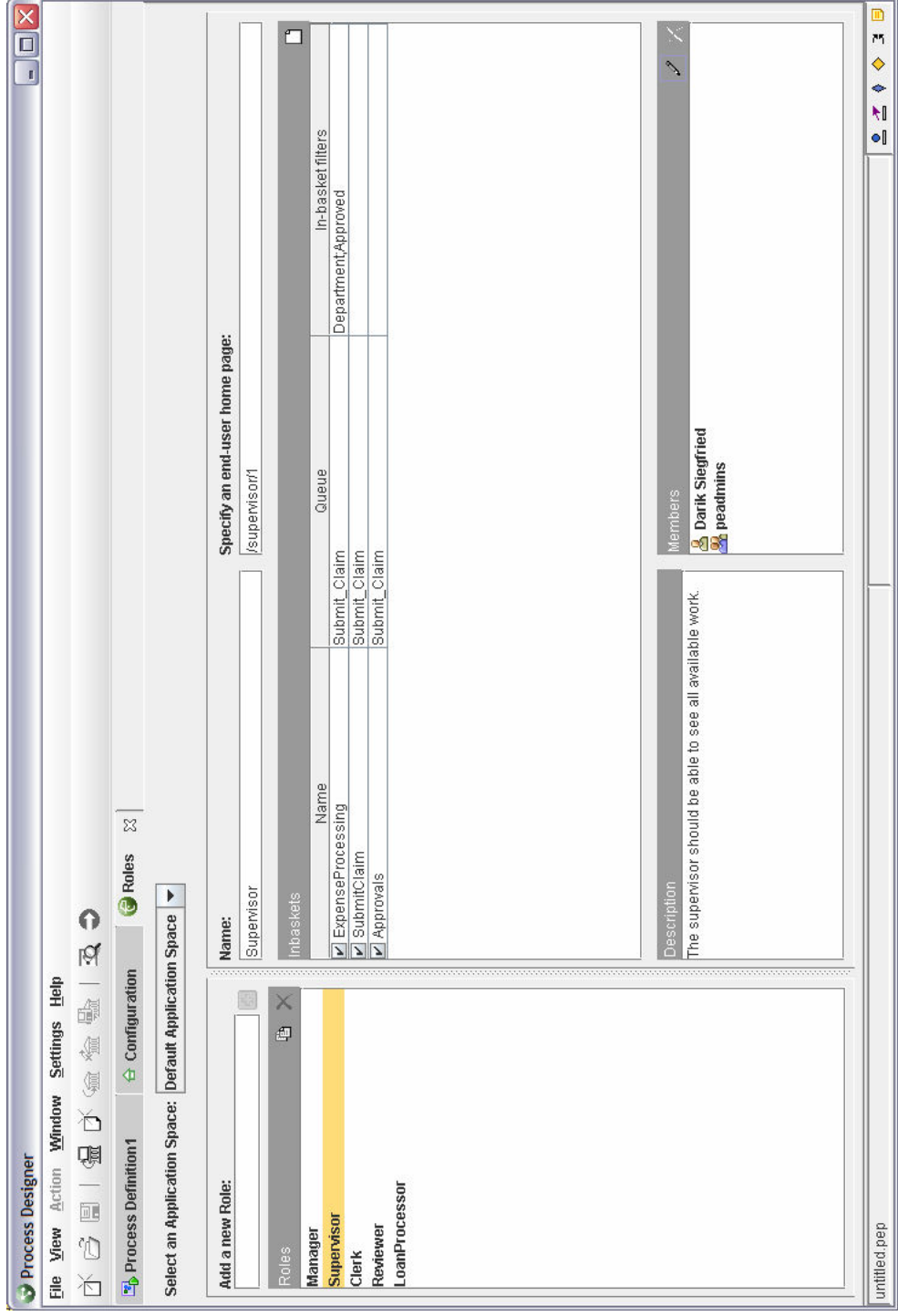
Design Mode – Review & Refine

- Add details and configuration, work queue assignment



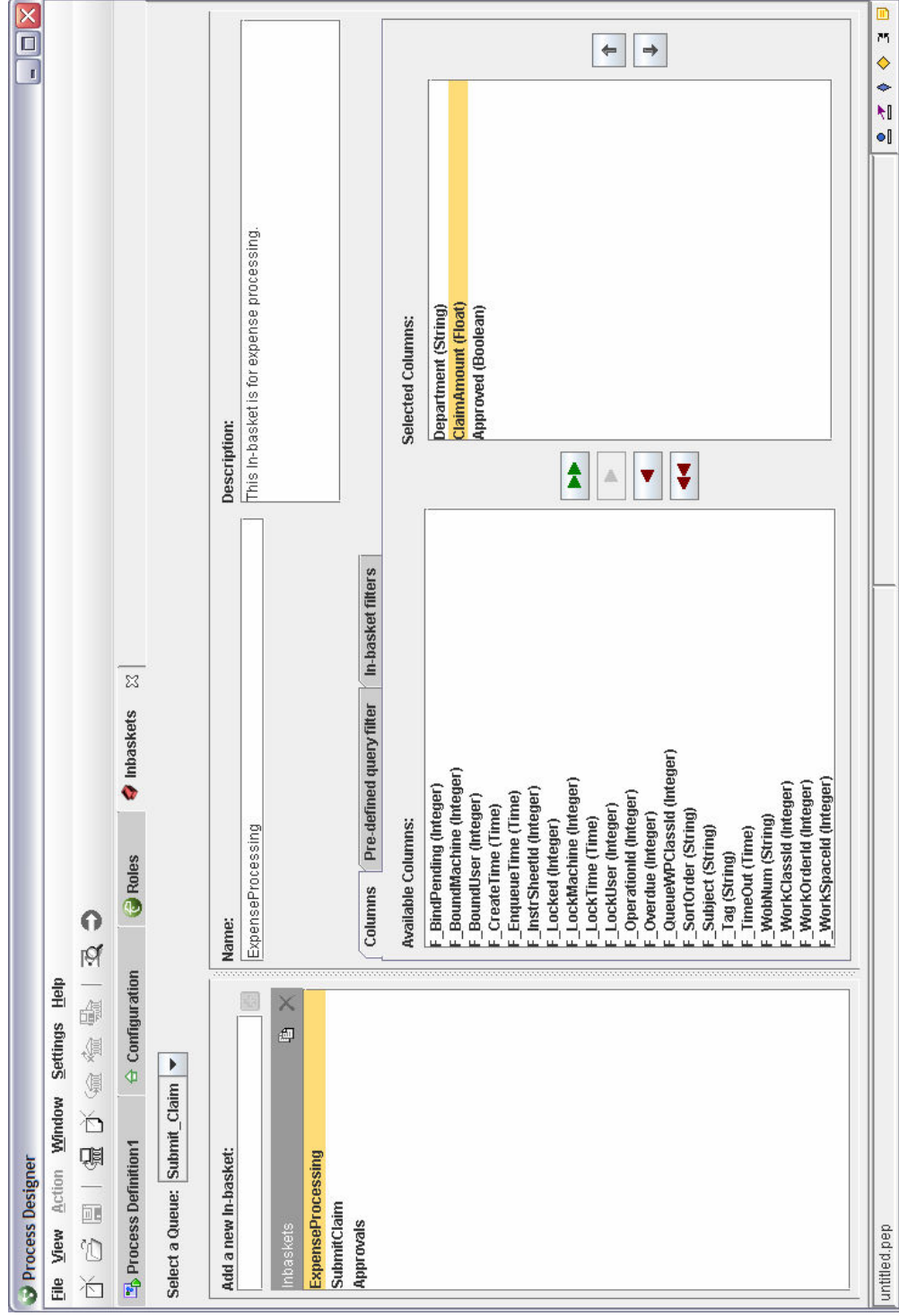
Design Mode – Define Roles

- Define roles and associate with InBaskets

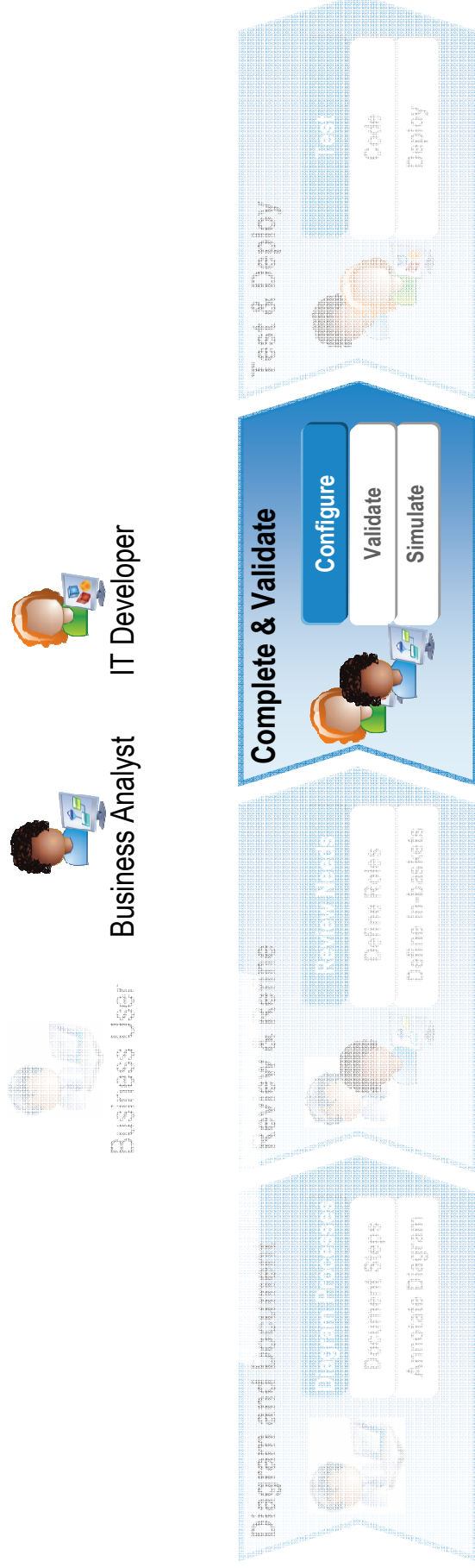


Design Mode – Define InBaskets

- Assign work item to a work queue



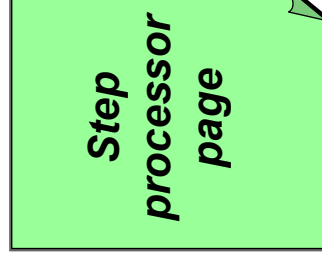
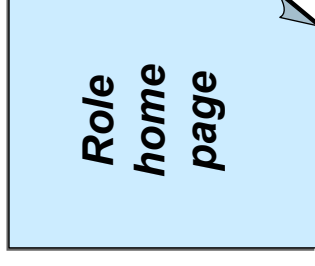
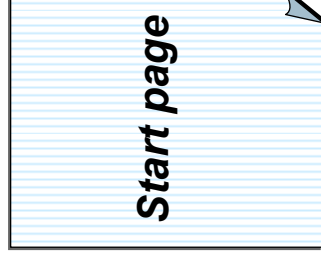
Stage 3: App Dev Stages – Complete & Validate



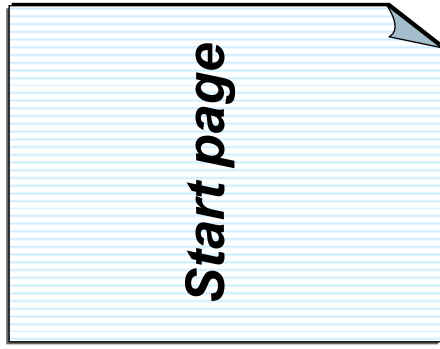
- In this stage IT (user interface developers) & business analysts build Home Pages for Roles and Step Processors using Mashups and Widgets
- ECM Widgets out of the box
- If a need be, they can also develop additional Widgets

Using IBM Mashup Center to create BPM UI

- Start page
 - Entry point for a BPM application
- Role home page
 - User interface for viewing and selecting work (in-basket) and changing roles
 - Associated with one or more roles using P8 BPM Process Designer
- Step processor page(s)
 - User interface for processing a work item
 - Associated with one or more process steps using P8 BPM Process Designer

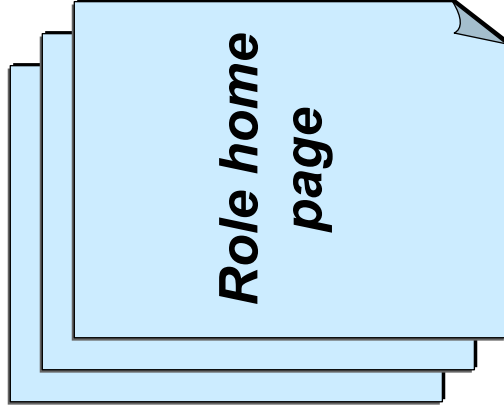
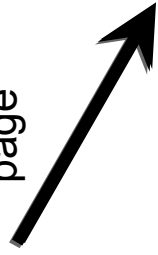


Page Navigation

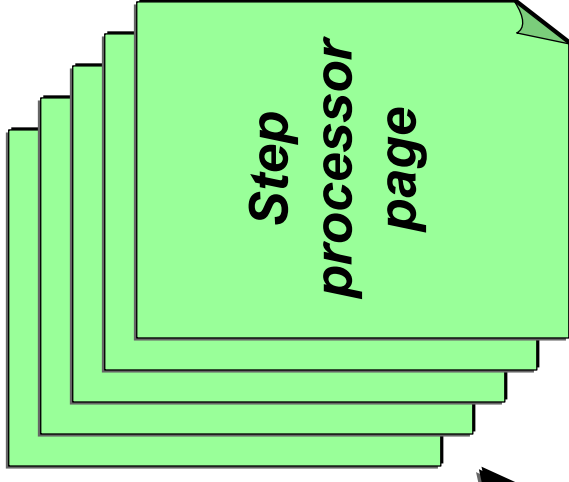


User begins at the Start page for the application

User immediately transitioned to role home page



User transitioned to another role home page when selecting a new role



User transitioned to a step processor page when opening a work-item or launching a new process

Role Home Page in Mashups

- Build a Home Page for each Role in the process

The screenshot displays the 'Clerk Role Main Page' within the IBM Business Activity Monitoring (BAM) application. The interface is divided into several sections:

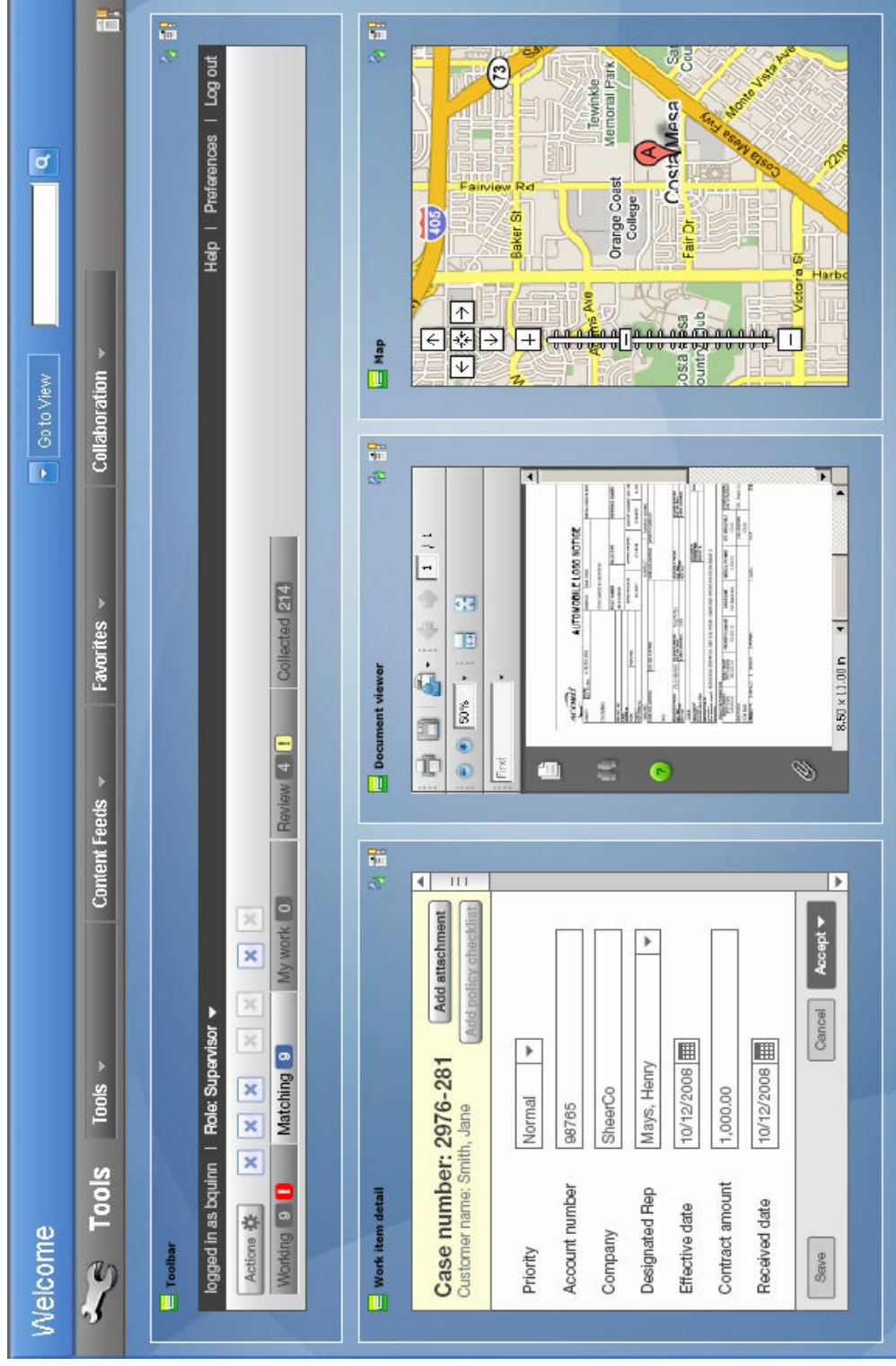
- Navigation and Search:** Includes a search bar at the top right, a 'Go to View' button, and a 'Collaboration' dropdown menu.
- Tools and Favorites:** A horizontal menu with 'Tools', 'Content Feeds', 'Favorites', and 'Collaboration' options.
- Dashboard Overview:** A 'Welcome' message and a 'Toolbar' with 'Actions', 'Working' (8), 'Matching' (8), 'My work' (0), and 'Review' (4) indicators.
- Table 1 (Left):** A table showing 'Date received' and 'Claim numbr'. The data is as follows:

Date received	Claim numbr
October 12, 2008 10:47 AM	4887450
October 12, 2008 10:32 AM	2384123
October 12, 2008 10:20 AM	2938008
October 12, 2008 10:20 AM	2976281
October 12, 2008 10:12 AM	9739021
October 12, 2008 9:59 AM	4887450
October 12, 2008 9:55 AM	2384123
October 12, 2008 9:49 AM	2938008
October 12, 2008 9:47 AM	2976281
October 12, 2008 9:39 AM	9739021
October 12, 2008 9:16 AM	4887450
October 12, 2008 8:24 AM	2384123
October 11, 2008 1:32 PM	2938008
October 11, 2008 10:19 PM	2976281
October 11, 2008 9:35 PM	9739021
- Table 2 (Right):** A table showing 'Date modified', 'Company', 'Case number', and 'Modified by'. The data is as follows:

Date modified	Company	Case number	Modified by
September 12, 2008 8:24 PM	SheerCo	4887450	cbbrickman
January 5, 2008 7:45 AM	SheerCo	2384123	jvasquez
May 29, 2008 2:15 AM	SheerCo	2938008	skuro
October 17, 2008 12:06 PM	SheerCo	2976281	hmays
November 28, 2008 4:12 PM	Amalgamated Industries	9739021	jvasquez
- Visualizations:**
 - Gauge:** A circular gauge showing a value of 87.
 - Bar Chart:** A bar chart comparing 'Total' and 'Worked' values across categories like '15-300vylr', '05-150vylr', and '00-050vylr'.
 - Line Chart:** A line chart showing 'Avg Pack...', 'Avg Load...', and 'Avg Pdbi...' over time.
 - Stacked Bar Chart:** A stacked bar chart showing 'Worked' and 'Total' for various categories.
- Footer:** A 'Work basket' section with a 'Show' dropdown and a note: 'Updated in last 10 days, all priorities, all cases, all statuses'.

Build Mashup-based Step Processor

- Build Mashup pages with widgets as a step processor



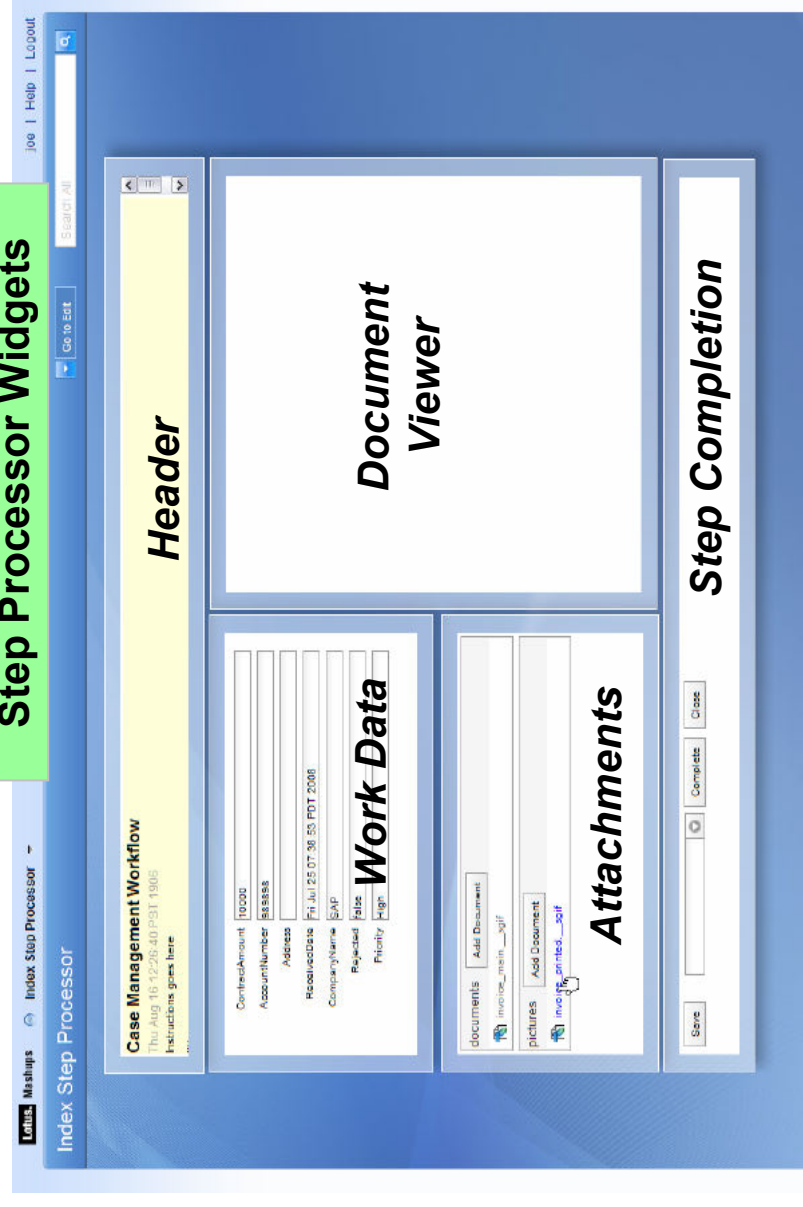
Various ECM Widgets

- Widgets are Visual Services that you can link to create pages
- Some Widgets are hidden (not visible) while others are visible
- We provide a set of pre-wired widgets as ECM Widgets
- Additional ones can easily be developed
- All widgets are based on IBM iWidgets standard

Toolbar Widgets



Step Processor Widgets



Widgets Events and Widget Configuration

Technical

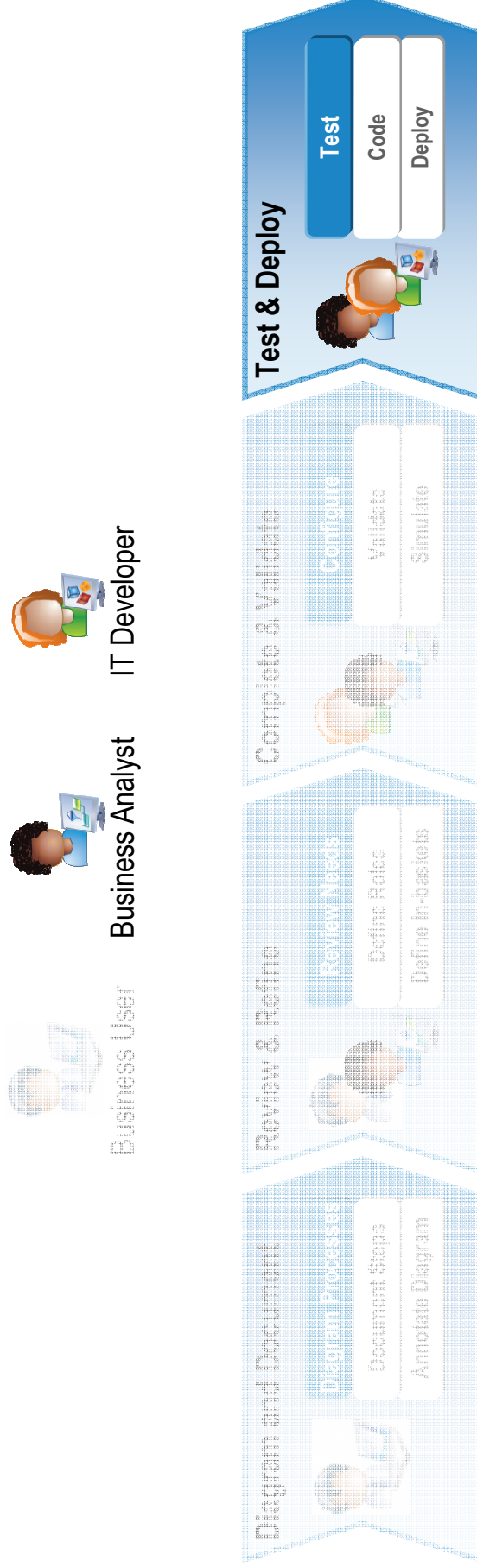
- **Widgets communicate with each other using *events***
 - When event is triggered, a ‘payload’ of data is sent by one widget and received by another widget
 - Events enable integration with 3rd party widgets
 - E.g. Selecting a work item in the in-basket displays a credit report for that user in another widget
 - Lotus Mashup provides a user interface to wire widgets together
 - Toccata widgets are automatically wired to make it easier to create role and step processor pages
- **Widget configuration *attributes* customize widget behavior**



Design Mode – Simulating the Process

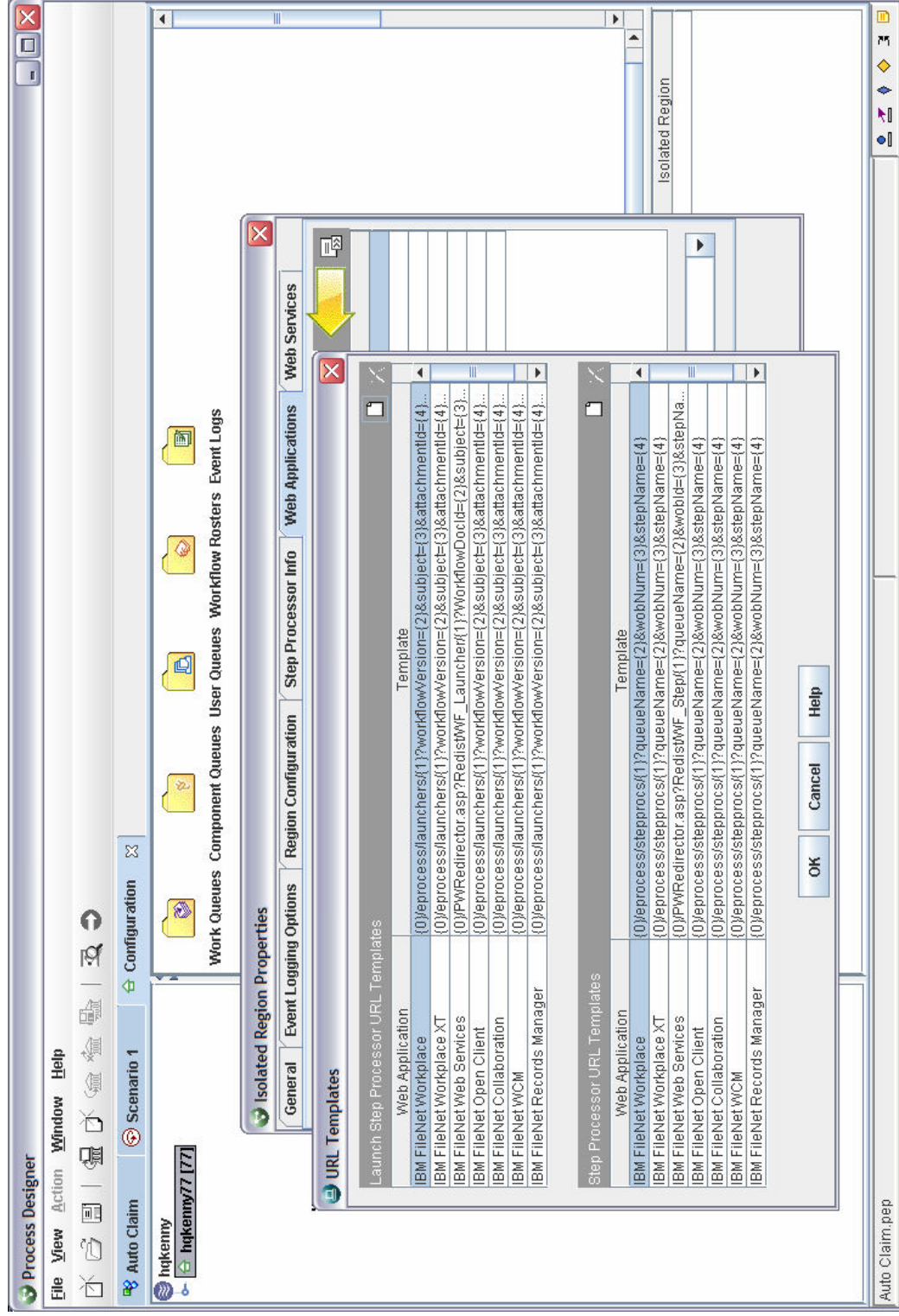
The screenshot displays the IBM Business Process Manager Design Mode interface. The main window, titled 'Process Definition1 - Workflow', shows a detailed flowchart for an 'Auto Claim' process. The workflow starts with a 'LaunchStep' leading to 'Claim Setup'. From 'Claim Setup', the process flows to 'Initial Review'. A decision point follows: 'Est Amount > 5000'. If true, it goes to 'Fraud Assessment'. If false, it goes to 'Decision'. The 'Decision' node has two paths: '[1] Amt > 10000' leading to 'Adjustor Review', and '[2] Amt <= 10000' leading to 'Settle Claim'. From 'Adjustor Review', there are three paths: '[1] Escalate' leading to 'Supervisor Review', '[2] Approved' leading to 'Settle Claim', and '[3] Declined' leading to 'Settle Claim'. From 'Supervisor Review', the path leads to 'Settle Claim'. Finally, 'Settle Claim' leads to 'Claim Processed'. A side panel on the left shows 'Scenario Properties' for 'Auto Claim' with a 'General' tab selected. Below the main canvas, there are tabs for 'Simulation' and 'End time', and a 'Duration' field. At the bottom, there are tabs for 'Simulation Statistics', 'Workflow Statistics', 'Step Statistics', and 'User Statistics'. The bottom status bar shows 'Auto Claim.pep'.

Stage 4: Test & Deploy



- In this stage IT (QA) & business analysts tests the finished process application (possibly in an staging environment) and then deploys it onto a production server, rolling it out to the intended end-users

Design Mode – Integrated Configuration Console



Application Spaces - Functionality

- **Roles are defined and managed within the context of an Application Space**
- **Application Space security settings define:**
 - Who can modify role membership for all roles in the Application Space
 - Who can modify roles in the Application Space
- **When should multiple Application Spaces be created?**
 - When separate, distinct applications are needed and user does not need to switch between roles in the different application spaces
 - To separate role management tasks

THY YOU