IBM WebSphere BPM User Group Meeting

IBM BPM 7.5 & IBM Decision Server

Richard Davies – IBM BRMS Technical Sales

Maxime Cenatiempo – IBM BPM Technical Sales
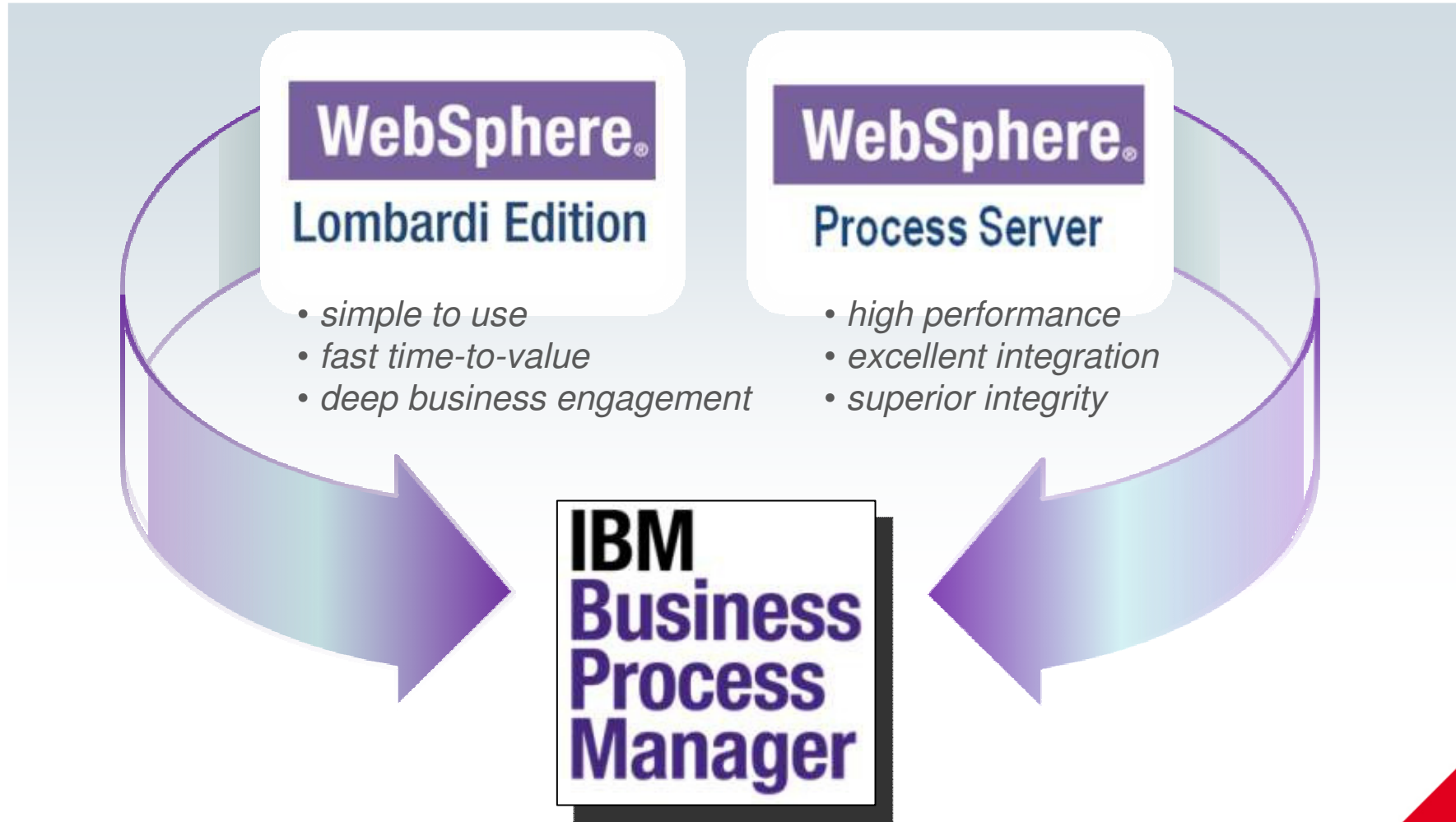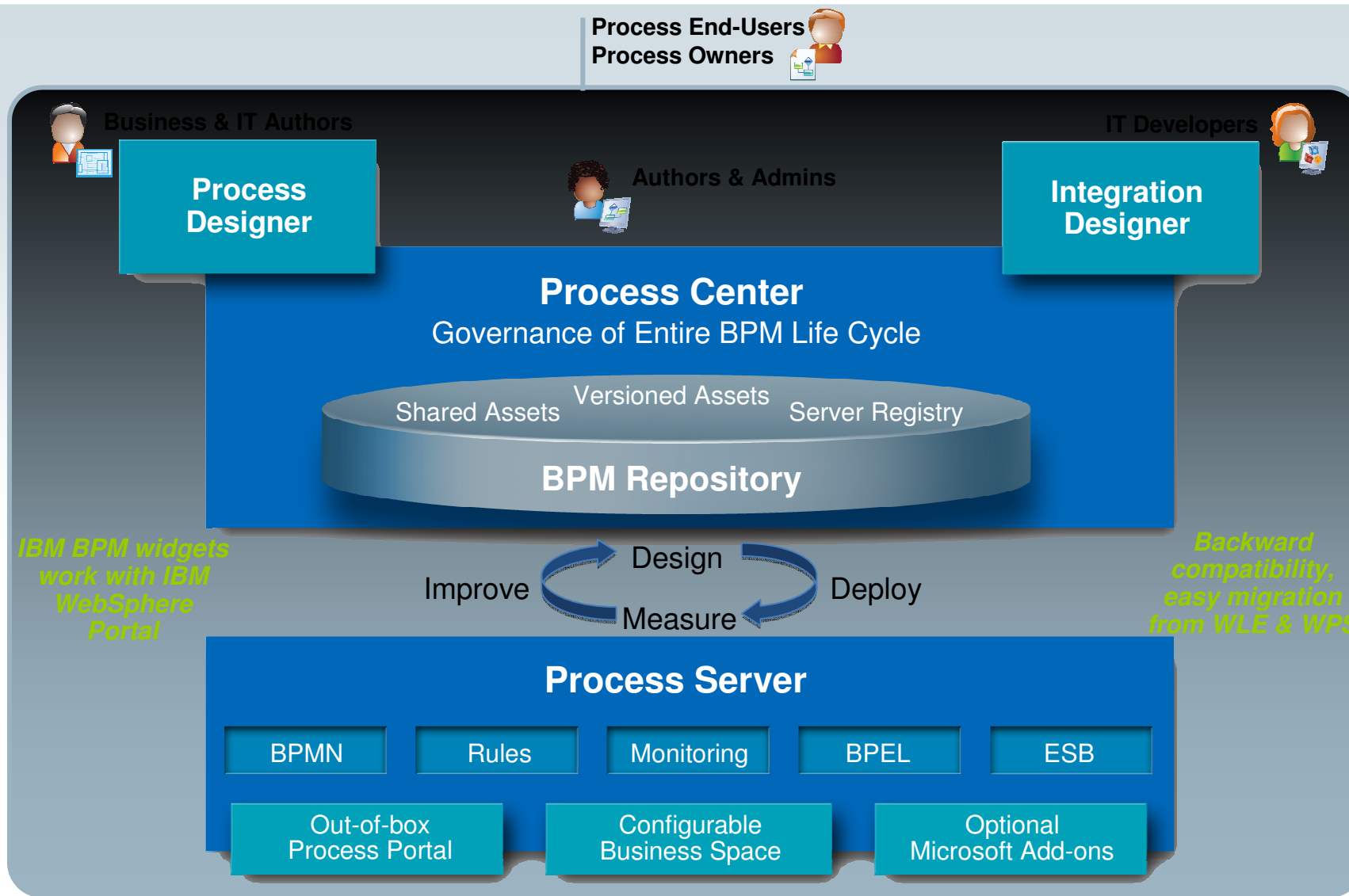
13/05/2011

Agenda

- IBM BPM Introduction

- What's new in IBM BPM for WPS Customers

- What's new in IBM BPM for Lombardi Customers

- Demonstration – IBM BPM 7.5

- BRMS & BEP Introduction

- IBM Decision Server

- Demonstration - ILOG & IBM BPM

- Q&A

IBM Business Process Management in 2011

WebSphere®
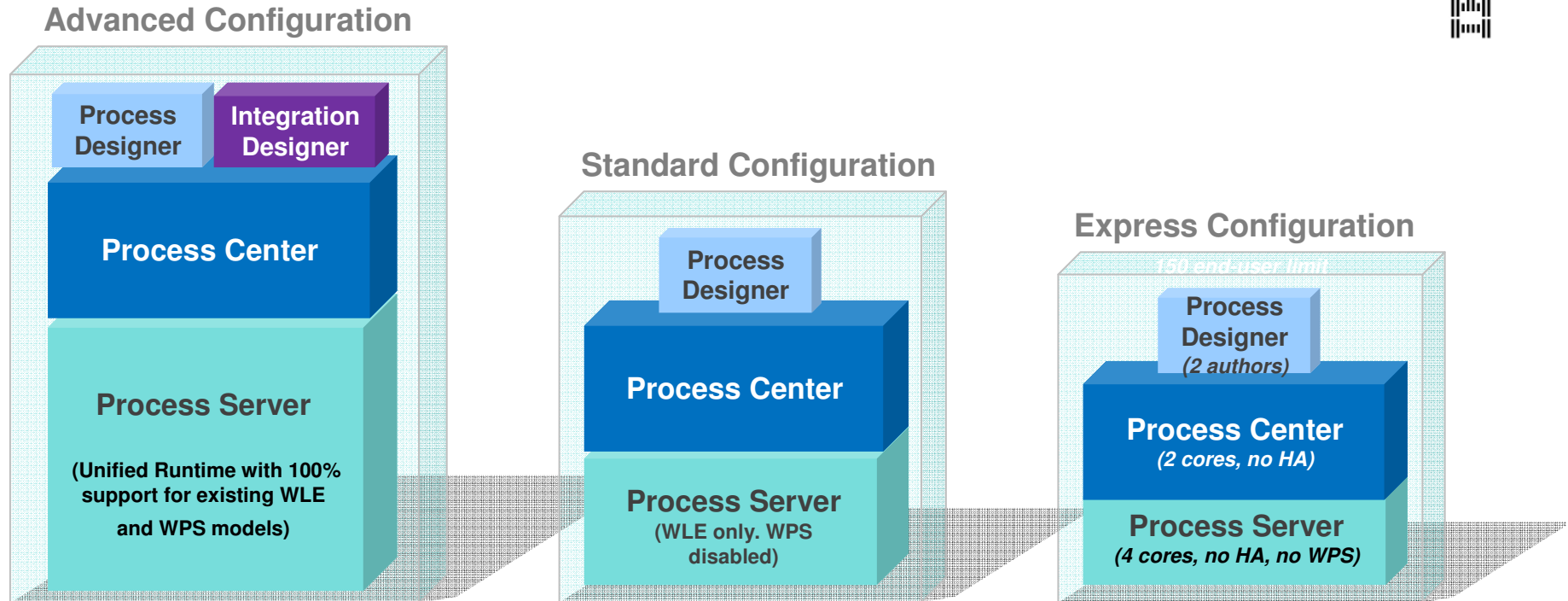**Lombardi Edition**

- *simple to use*
- *fast time-to-value*
- *deep business engagement*

WebSphere®
Process Server

- *high performance*
- *excellent integration*
- *superior integrity*

IBM
Business
Process
Manager

IBM Business Process Manager 7.5

Process End-Users
Process Owners

Business & IT Authors

IT Developers

Process Designer

Authors & Admins

Integration Designer

Process Center
Governance of Entire BPM Life Cycle

Shared Assets   Versioned Assets   Server Registry

BPM Repository

IBM BPM widgets work with IBM WebSphere Portal

Design
Improve   Deploy
Measure

Backward compatibility, easy migration from WLE & WPS

Process Server

| BPMN | Rules | Monitoring | BPEL | ESB |

| Out-of-box Process Portal | Configurable Business Space | Optional Microsoft Add-ons |

IBM BPM Configurations

*Different configurations match typical entry points or stages in a company's BPM program*

Advanced Configuration

Process Designer	Integration Designer

Process Center

Process Server

(Unified Runtime with 100% support for existing WLE and WPS models)

Standard Configuration

Process Designer

Process Center

Process Server
(WLE only. WPS disabled)

Express Configuration

150 end-user limit

Process Designer
(2 authors)

Process Center
(2 cores, no HA)

Process Server
(4 cores, no HA, no WPS)

Complete set of advanced BPM capabilities

- Includes standard BPM capabilities,
- Extended support for high-volume process automation, with high quality-of-service
- Built-in SOA components for extensive enterprise-wide service integration, orchestration

Configured for typical BPM projects, programs

- For multi-project improvement programs, with high business involvement
- Focus on improved workflow, productivity
- Basic system integration support
- Rapid time-to-value

Configured for first BPM projects

- For small numbers of users – single server, no clustering
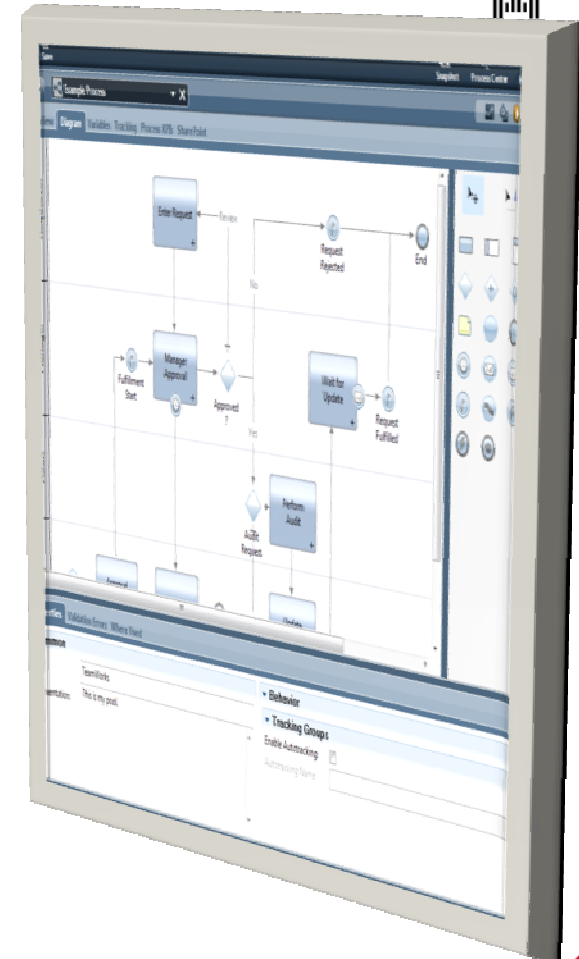- Low entry price
- Easy to install, easy to use
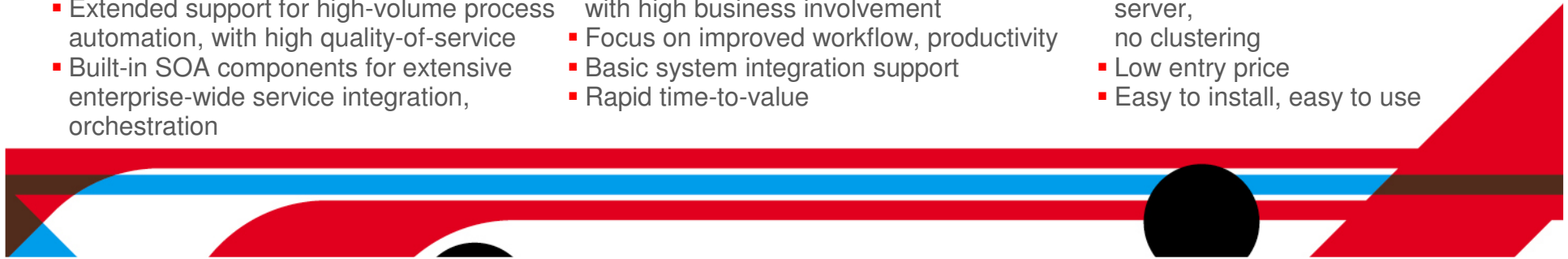
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What's new in IBM BPM 7.5 for WPS Customers ?
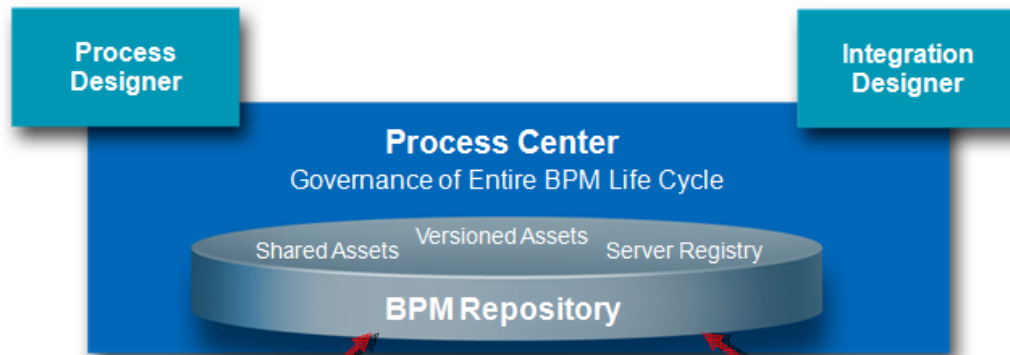## *Better Business & IT Collaboration*

- Validate implementation faster
- Visualise version to version changes
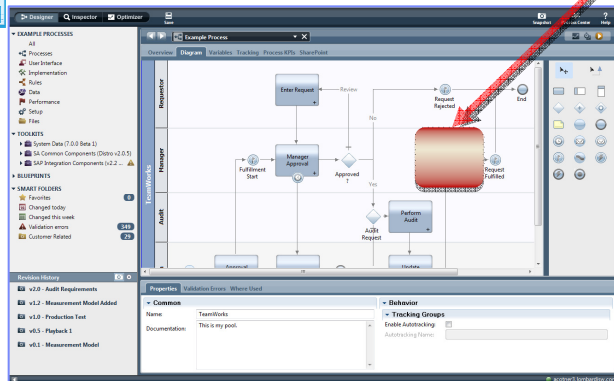- IT impact more visible to the business

What's new in IBM BPM 7.5 for WPS Customers ?
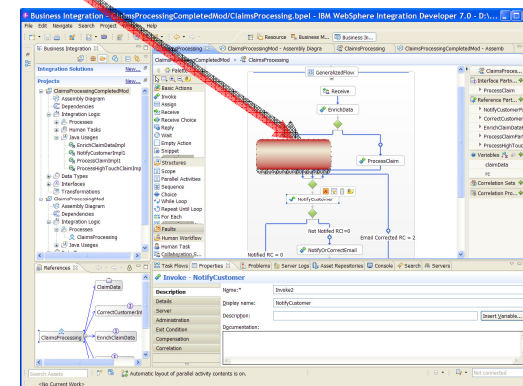## *Development Collaboration with Process Center*

Business Author requires a back-end integration for an Expense Reporting process that he is building
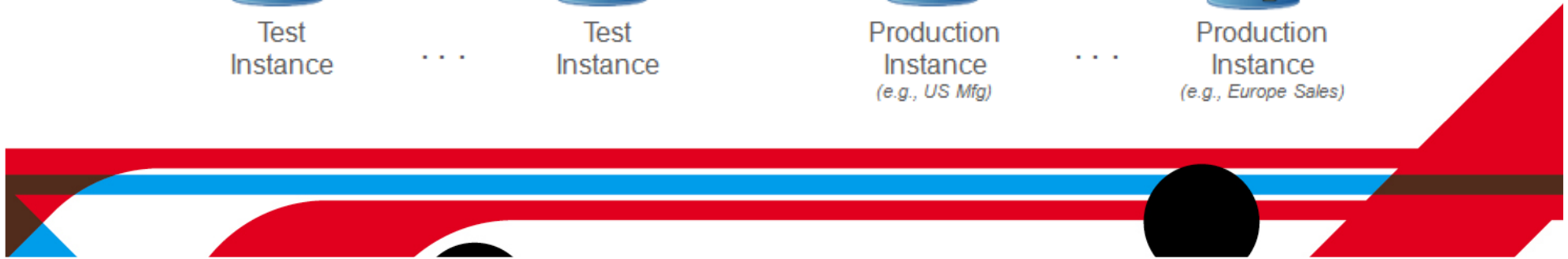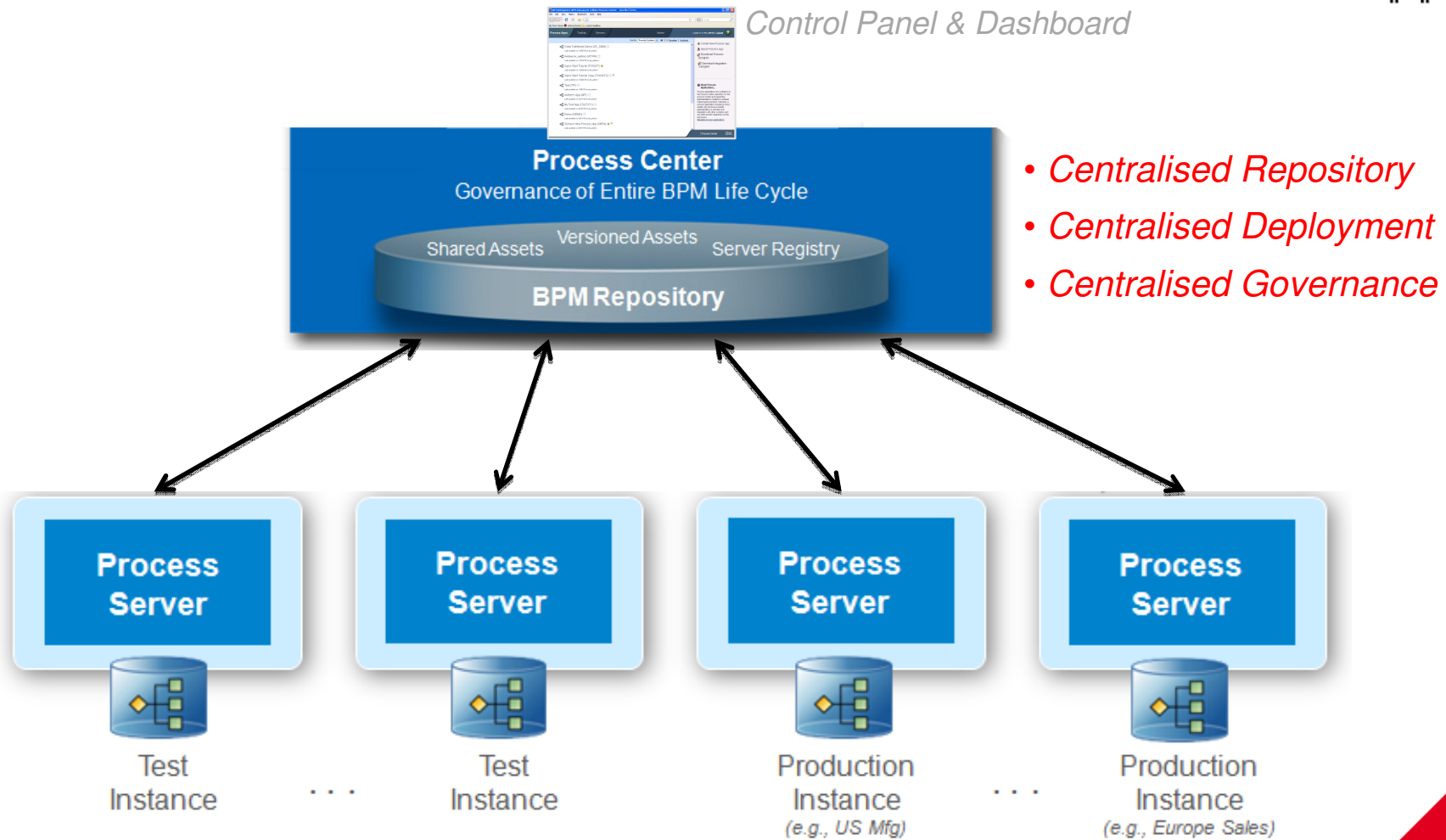
Integration Developer is building a straight-through Credit Check process that has a business exception path requiring human interaction
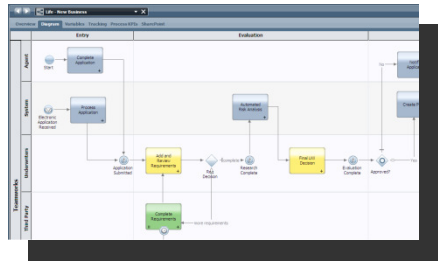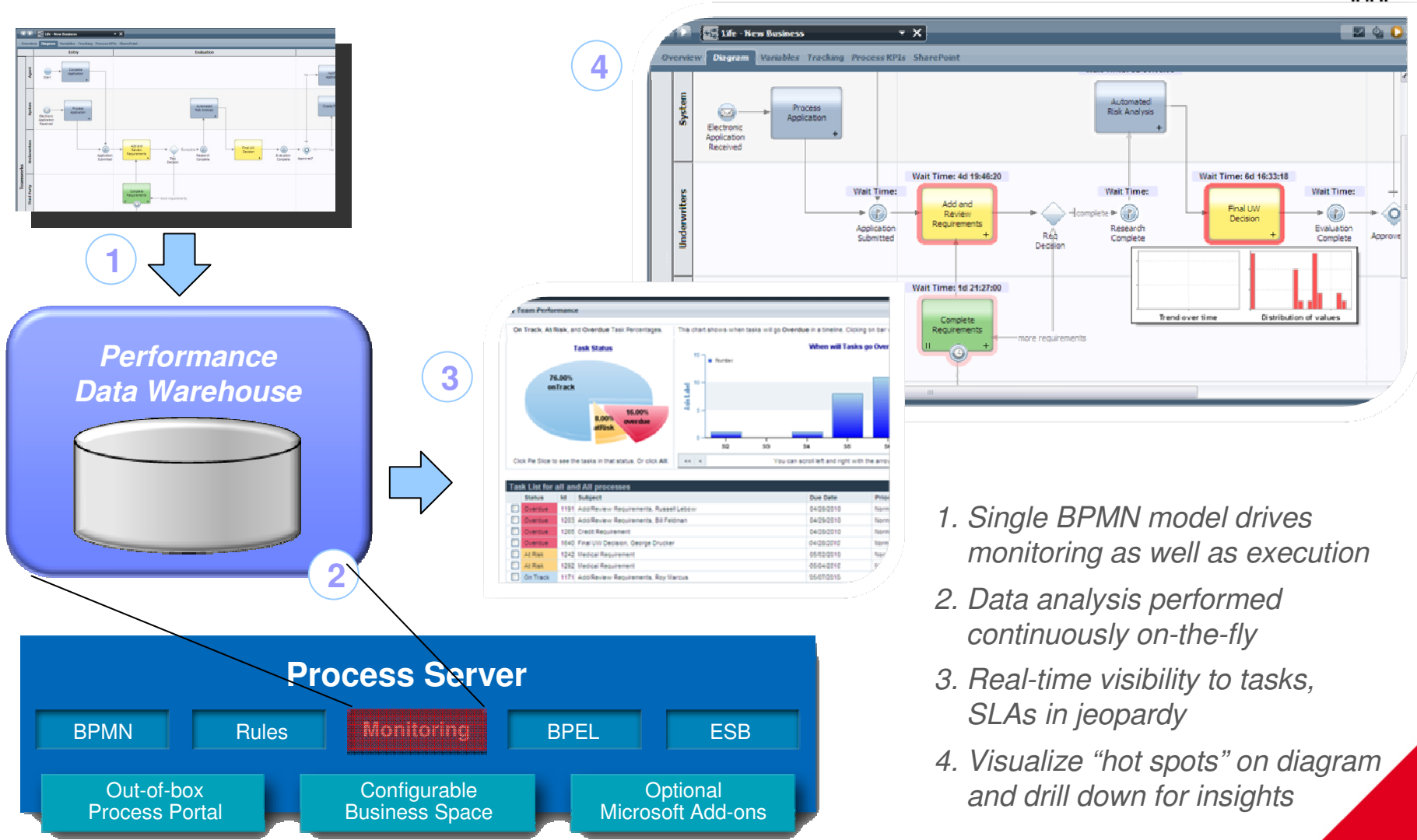
What's new in IBM BPM 7.5 for WPS Customers ?
Centralised Process Governance

Control Panel & Dashboard

Process Center
Governance of Entire BPM Life Cycle

Shared Assets   Versioned Assets   Server Registry

BPM Repository

- *Centralised Repository*
- *Centralised Deployment*
- *Centralised Governance*

Process Server

Process Server

Process Server

Process Server

Test Instance

. . .

Test Instance

Production Instance
(e.g., US Mfg)

. . .

Production Instance
(e.g., Europe Sales)

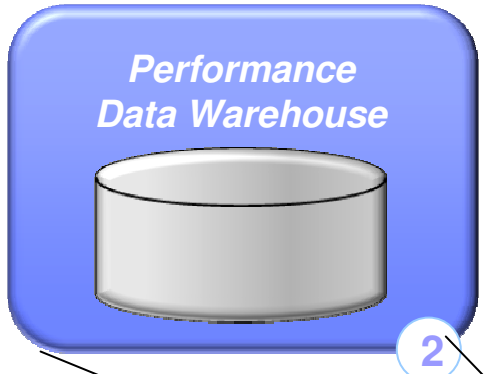# What's new in IBM BPM 7.5 for WPS Customers ?
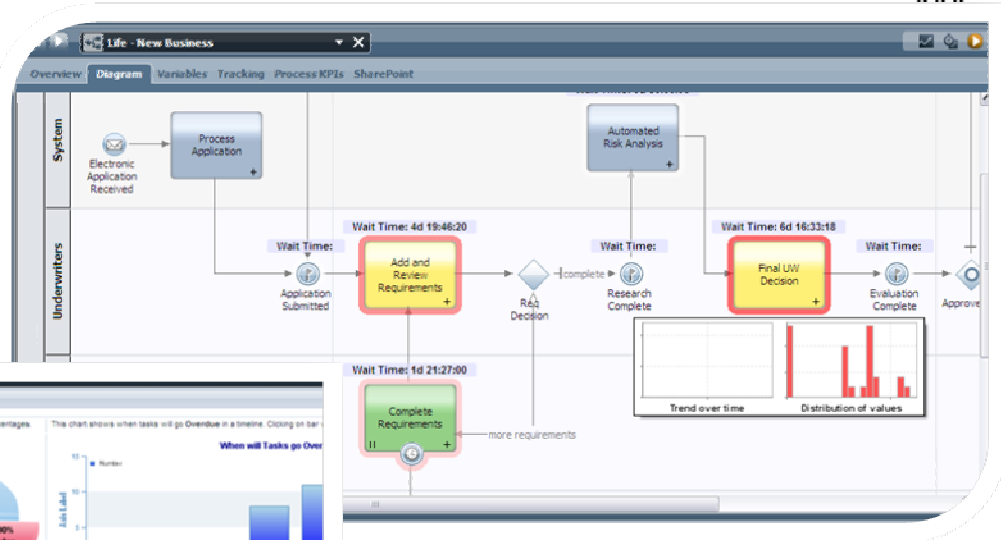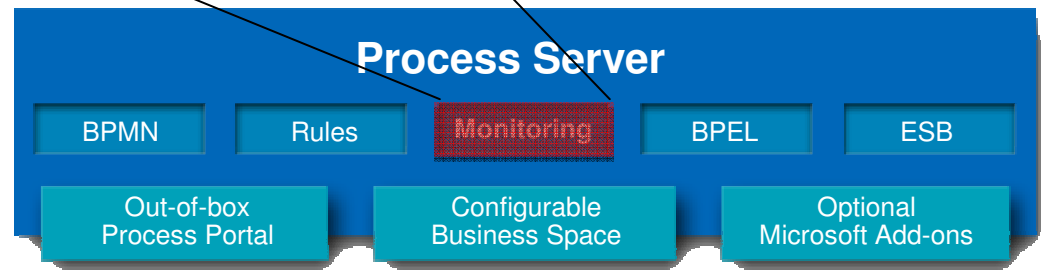## Built-in Monitoring for Visibility

1. Single BPMN model drives monitoring as well as execution

2. Data analysis performed continuously on-the-fly

3. Real-time visibility to tasks, SLAs in jeopardy

4. Visualize "hot spots" on diagram and drill down for insights

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- IBM Decision Server

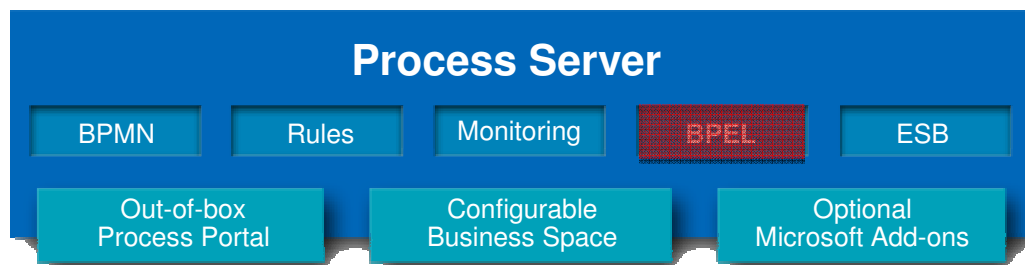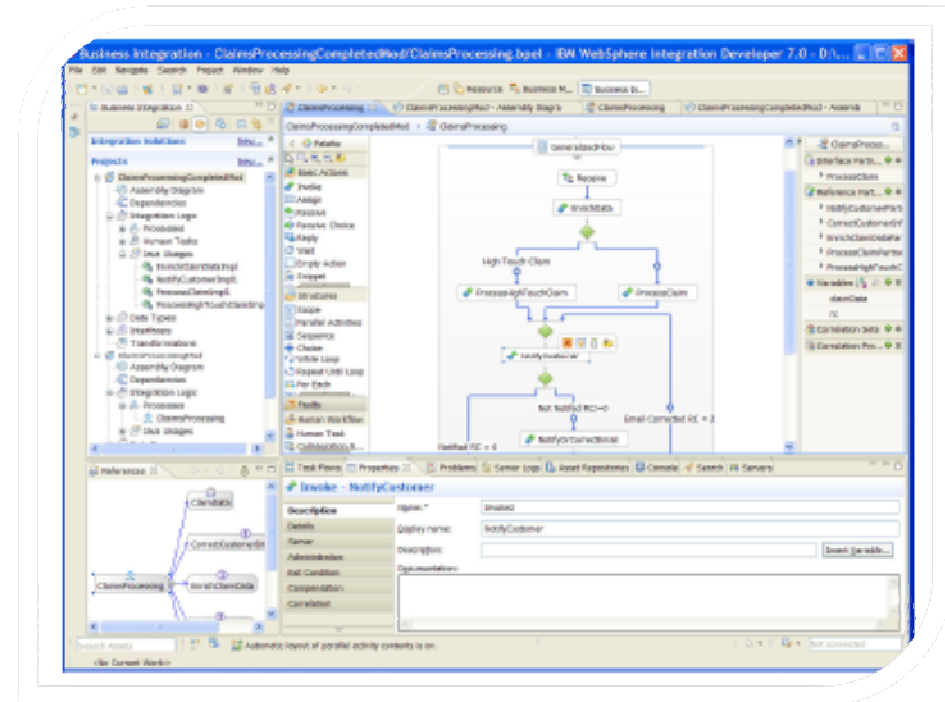- Demonstration - ILOG & IBM BPM

- Q&A

What's new in IBM BPM 7.5 for Lombardi Customers ?
Advanced Integration Service

- Access to enterprise class BPEL engine

- Provides an optimization path for existing straight through sub processes

- Able to import existing BPEL models as part of the total process orchestration

- Visual design tool for complex integrations (IBM Integration Designer)

Process Server

BPMN	Rules	Monitoring	BPEL	ESB

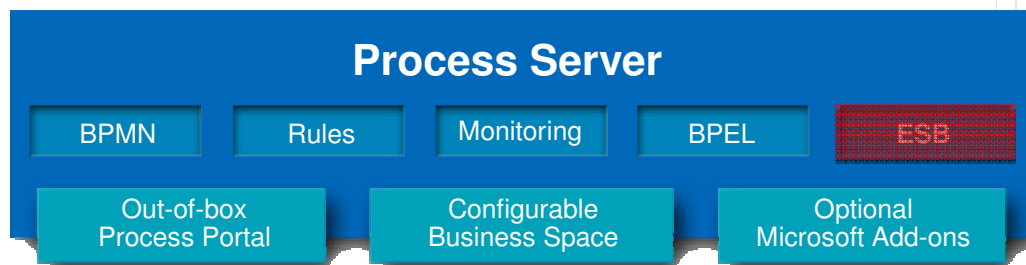| Out-of-box Process Portal	Configurable Business Space	Optional Microsoft Add-ons

What's new in IBM BPM 7.5 for Lombardi Customers ?
Integrated Enterprise Service Bus

- Integrated solution for service mediation

- Delivers business-critical qualities of service

- Access to existing WESB connectors

- Broad support of application environments and protocols, standard XML and web services formats
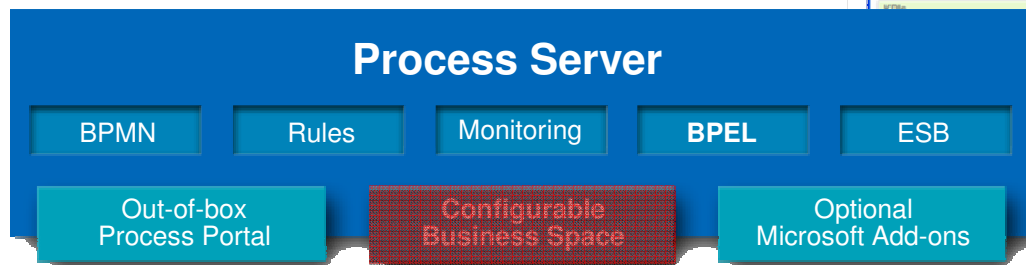
- Enables SCA/SOA standard solution architectures

Process Server

| BPMN | Rules | Monitoring | BPEL | ESB |

| Out-of-box Process Portal | Configurable Business Space | Optional Microsoft Add-ons |

What's new in IBM BPM 7.5 for Lombardi Customers ?
Business Space Portal

- Based on Lotus Mashups technology

- Widget style portal that allows for view and content customization

- Widget to widget communications for integrated feel

- Custom skins and appearance
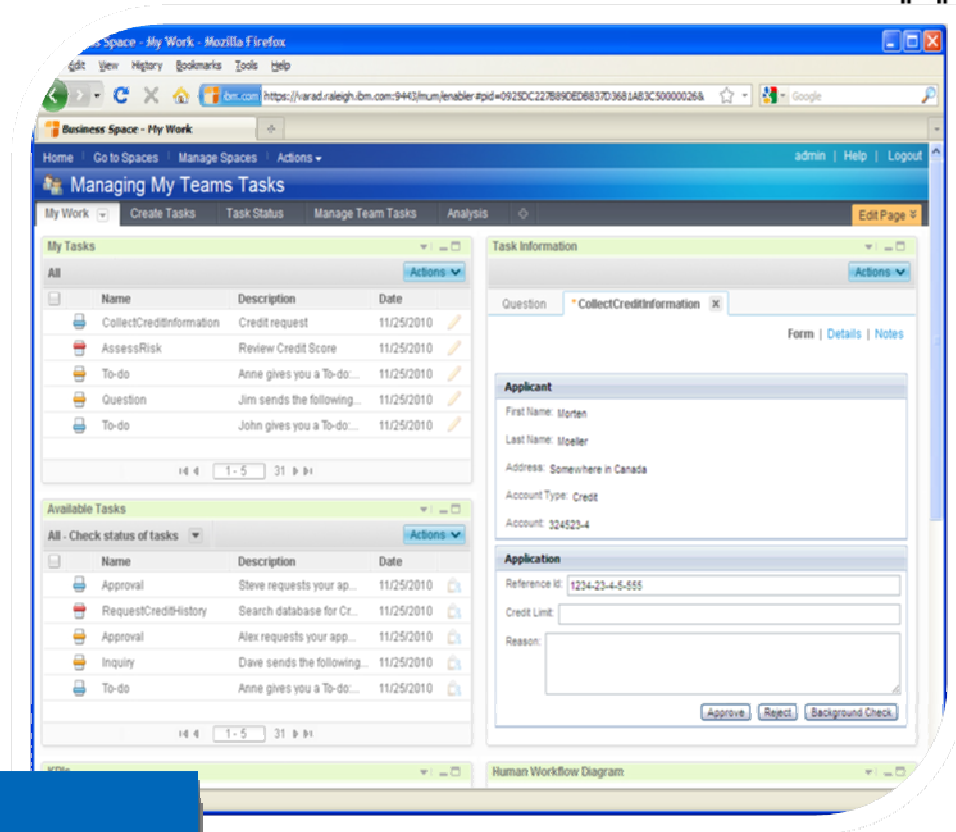
Process Server

| BPMN | Rules | Monitoring | **BPEL** | ESB |

| Out-of-box Process Portal | Configurable Business Space | Optional Microsoft Add-ons |

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IBM BPM 7.5 – Demonstration
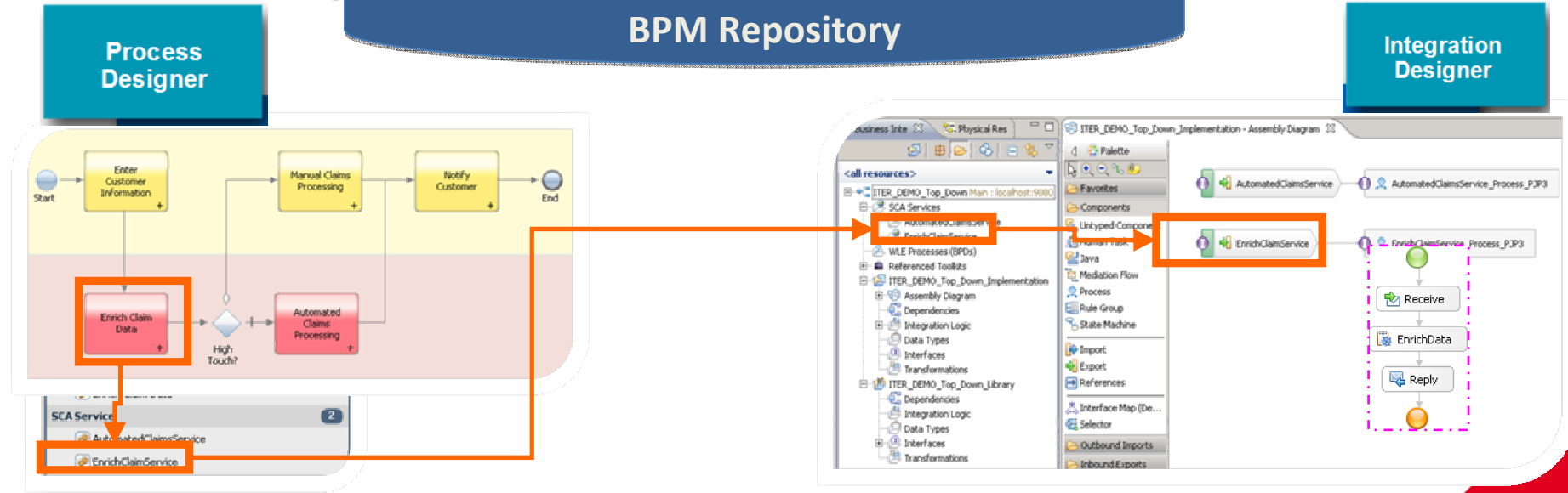## Scenario

Business Process Owner

- *Authors a Process Application*
- *Defines Service Interfaces for Implementation by Integration Developer*

Integration Developer

- *Imports the Process Application*
- *Generates Service Implementations*
- *Delivers Services to Repository*

Business Process Owner

- *Wires the Implemented Services to the Process*
- *Unit Test the Process*
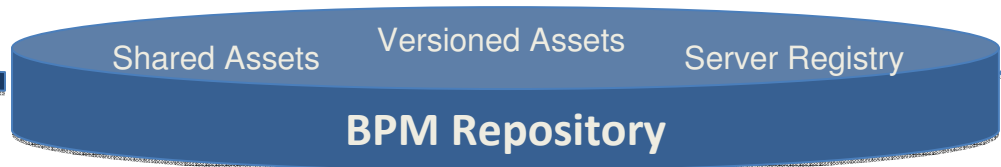
Shared Assets   Versioned Assets   Server Registry

BPM Repository

Process Designer

Integration Designer

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Business Decisions are everywhere

We need to add an eligibility check to meet the requirements of the new regulation.

Let's create a special promotion for our best customers.

Up-sell/Cross-sell offer

Commissions / Royalties

Compliance Screening

Underwriting

Tax calculation

Documentation Requirements

Billing

Fraud assessment

Accounting Disposition

Configuration

Eligibility

Pricing

Product Selection

Benefit calculation

Can we automate approvals for this type of order?

And Changing Frequently

Traditional Approach for Managing Change

- Decisions used in operations = "business rules"
  - Derived from organizational policies, procedures and internal/external regulations
- For operational systems, business rules are usually contained within application code, although they can also be in documentation or the knowledge of employees

Where Business Rules Typically Exist

Applications

Documents

People

Processes

Issues

- **Rules are hidden in code or isolated within the organization**

- **Changes are hard to track and maintain over time**

- **Rules used by systems have to be programmed and require IT resources**

- **Duplication and multiple versions of the same rules**

- **Lack of auditability, traceability**

- **Decision _changes_ cannot be easily tested, simulated & implemented**

Easy, Fast, Reliable Change with BRMS

```
if
    all of the following conditions are true :
            - the age of the driver is between 18 and 21
            - the number of accidents the driver has been involved is at least 1
            - the number of traffic tickets the driver has received is at least 1

then
    add a $ 8 surcharge to 'Auto Quote Response' , reason: "Young driver surcha
```

Where Business Rules Typically Exist

```
#ifdef __WIN__
    /*
    Before performing any socket operation (like retrieving hostname
    in init_common_variables we have to call WSAStartup
    */
    {
        WSADATA WsaData;
        if (SOCKET_ERROR == WSAStartup (0x0101, &WsaData))
        {
            /* errors are not read yet, so we use english text here */
            my_message(ER_WSAS_FAILED, "WSAStartup Failed", MYF(0));
            unireg_abort(1);
        }
    }
#endif /* __WIN__ */

    if (init_common_variables(MYSQL_CONFIG_NAME,
                    argc, argv, load_default_groups))
        unireg_abort(1);                        // Will do exit

    init_signals();
    if (!(opt_specialflag & SPECIAL_NO_PRIOR))
        my_pthread_setprio(pthread_self(),CONNECT_PRIOR);
```
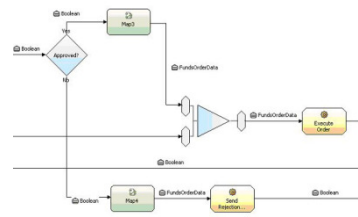
Applications

Documents

People
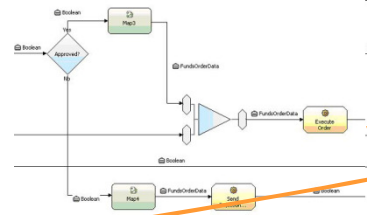
Processes

Business Rule Management System
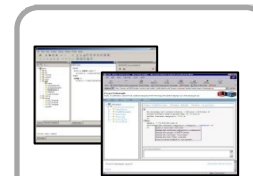
User Tools

Rules are <u>Defined, Analyzed and Maintained</u>

Rules + Metadata
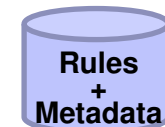
Rule Repository

Rules are <u>Stored</u> and <u>Shared</u>

Rule Server

Rules are <u>Deployed, Executed and Monitored</u>

Business Events are Everywhere

Address Change

Large Transaction

Bill paid

Logged into website

Accept offer

Account rollover

Wire transfer

Customer complaint

Close account

Late payment

Increase in activity

Added dependent

Open account

Suspicious activity

Start Application for New Account
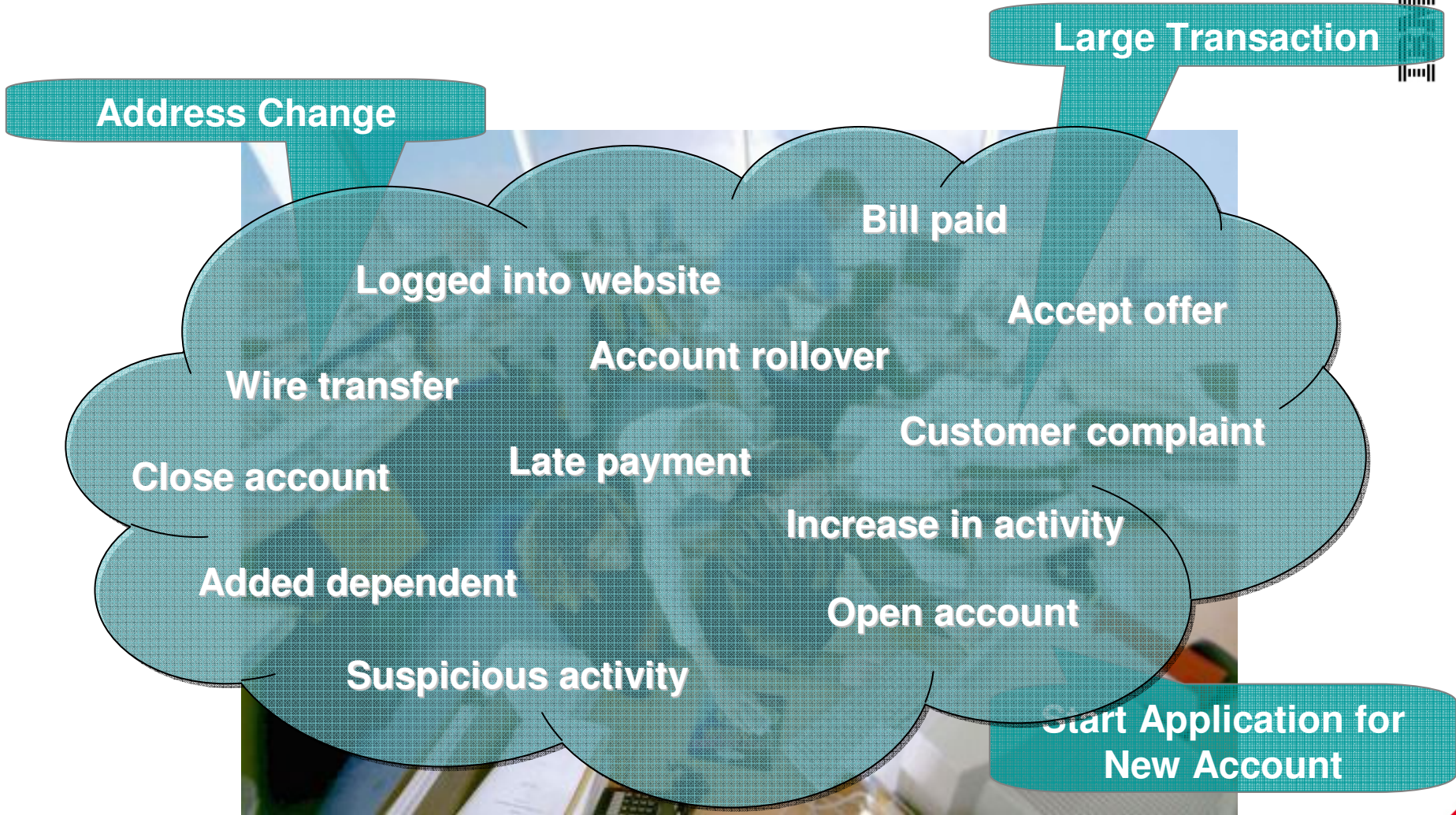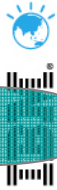
And Constantly Increasing

Situational Awareness and Response
BEP - Sense and Respond as Situations Occur

Event
Account
Withdraw

Actionable Situation
Numerous small deposits and small withdrawals within short time frame

Action: Flag account and initiate money laundering evaluation

Event
Started
Application
For New
Account

Actionable Situation
Did not complete application after 2 days and have had other activity with the bank or are an existing customer

Action: Trigger follow-up process to assist with completion of the application

Event
Account
Withdraw

Actionable Situation
High-value customer and cumulative withdraws G.T. 75% of balance within last 30 days

Action: Alert Account Manager of possible attrition

WebSphere Business Events
Correlation of business events from any source, over any time frame
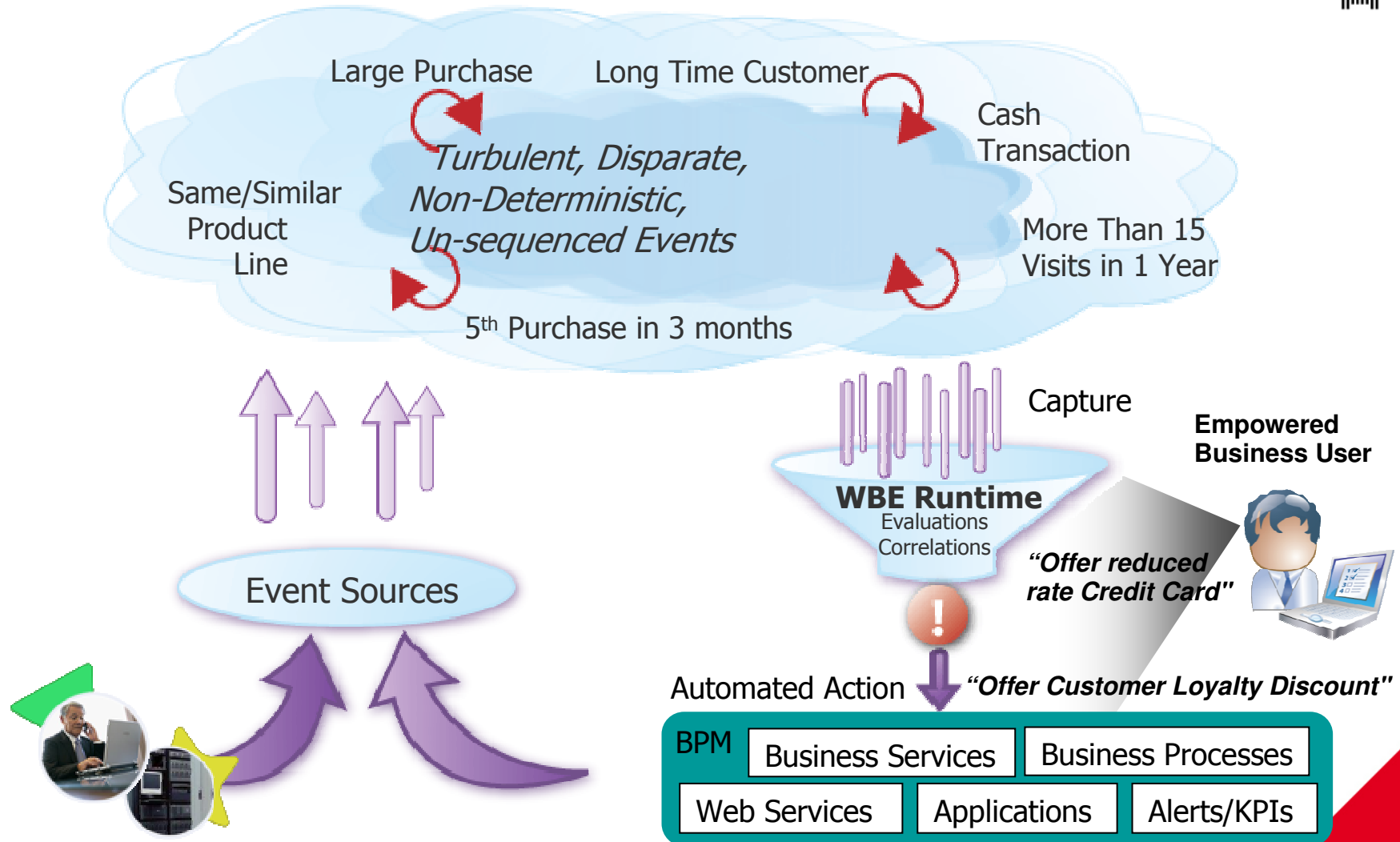
Large Purchase

Long Time Customer

Cash Transaction

Same/Similar Product Line

Turbulent, Disparate, Non-Deterministic, Un-sequenced Events

More Than 15 Visits in 1 Year

5th Purchase in 3 months

Capture

Empowered Business User

WBE Runtime
Evaluations
Correlations

"Offer reduced rate Credit Card"

Event Sources

Automated Action

"Offer Customer Loyalty Discount"

BPM

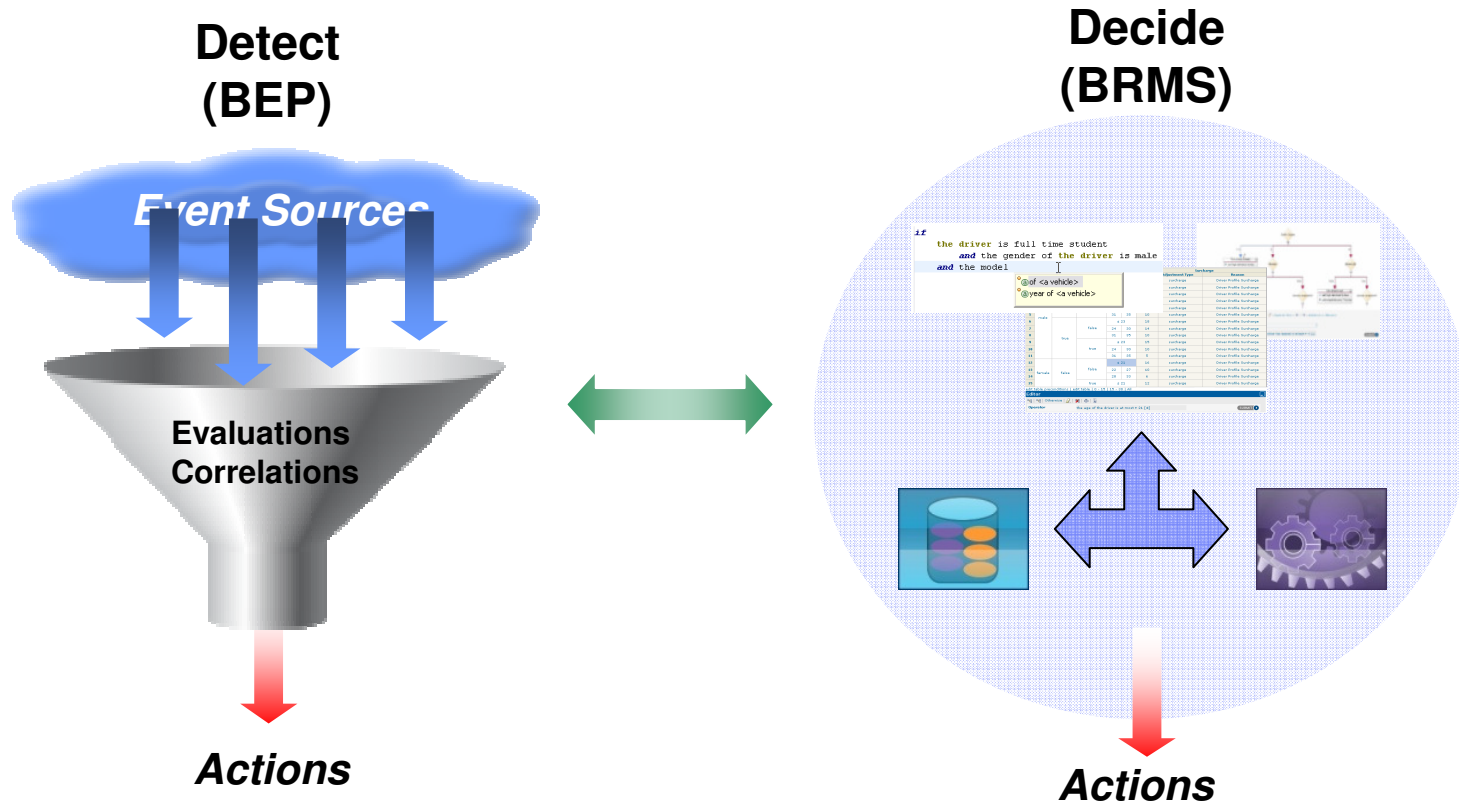| Business Services | Business Processes |
| Web Services | Applications | Alerts/KPIs |

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Announcing: WebSphere Decision Server
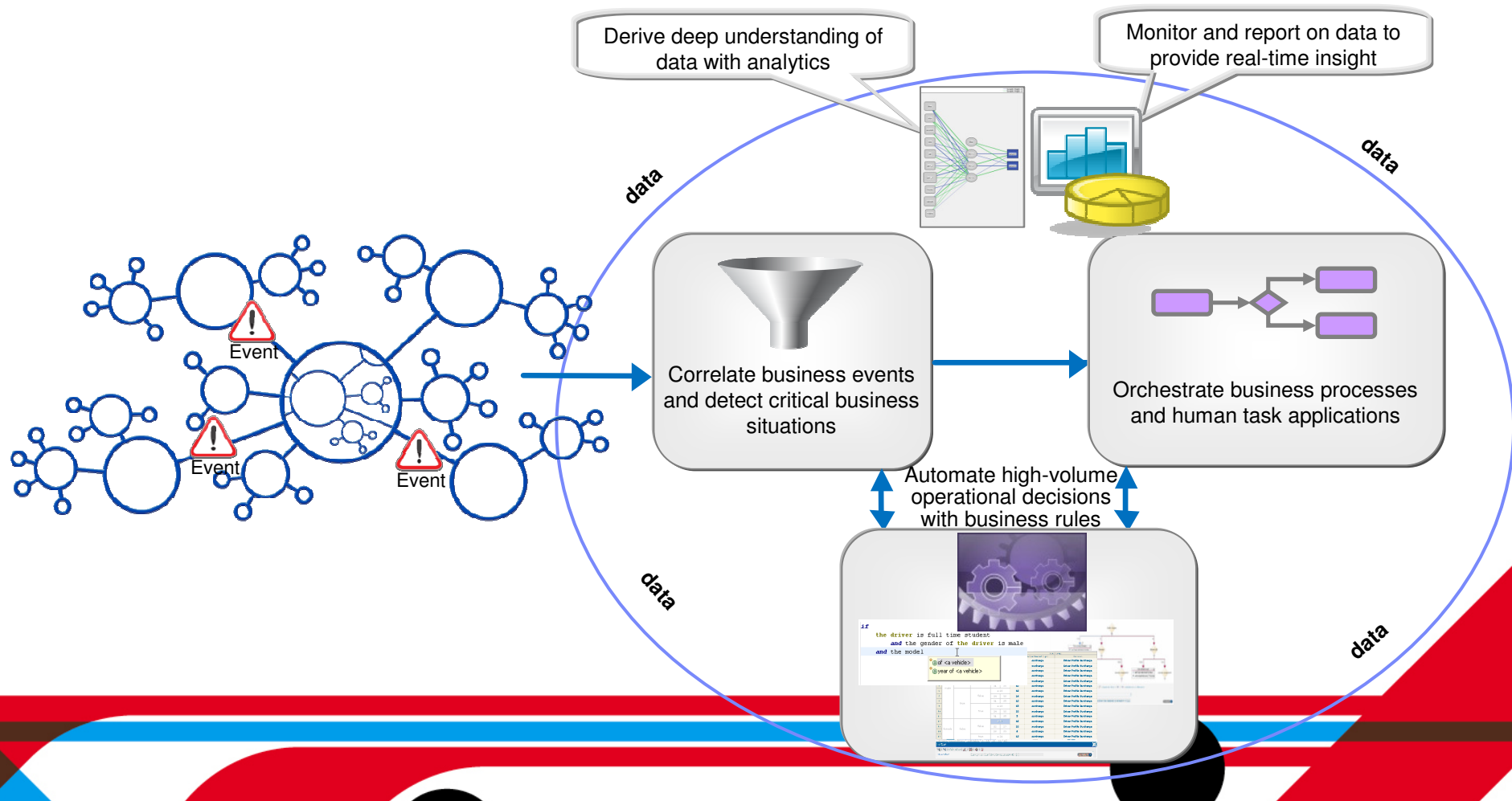## *Together : Additional Insight for Action*

**Detect
(BEP)**

**Decide
(BRMS)**

Event Sources

**Evaluations
Correlations**

```
if
    the driver is full time student
    and the gender of the driver is male
and the model
    @of <a vehicle>
    @year of <a vehicle>
```

Actions

Actions

> ▶ **BEP -** <u>Detects</u> **when events or patterns of events occur to notify people or systems to take action**

> ▶ **BRMS -** <u>Decides</u> **business outcome through execution of business rules against available data**
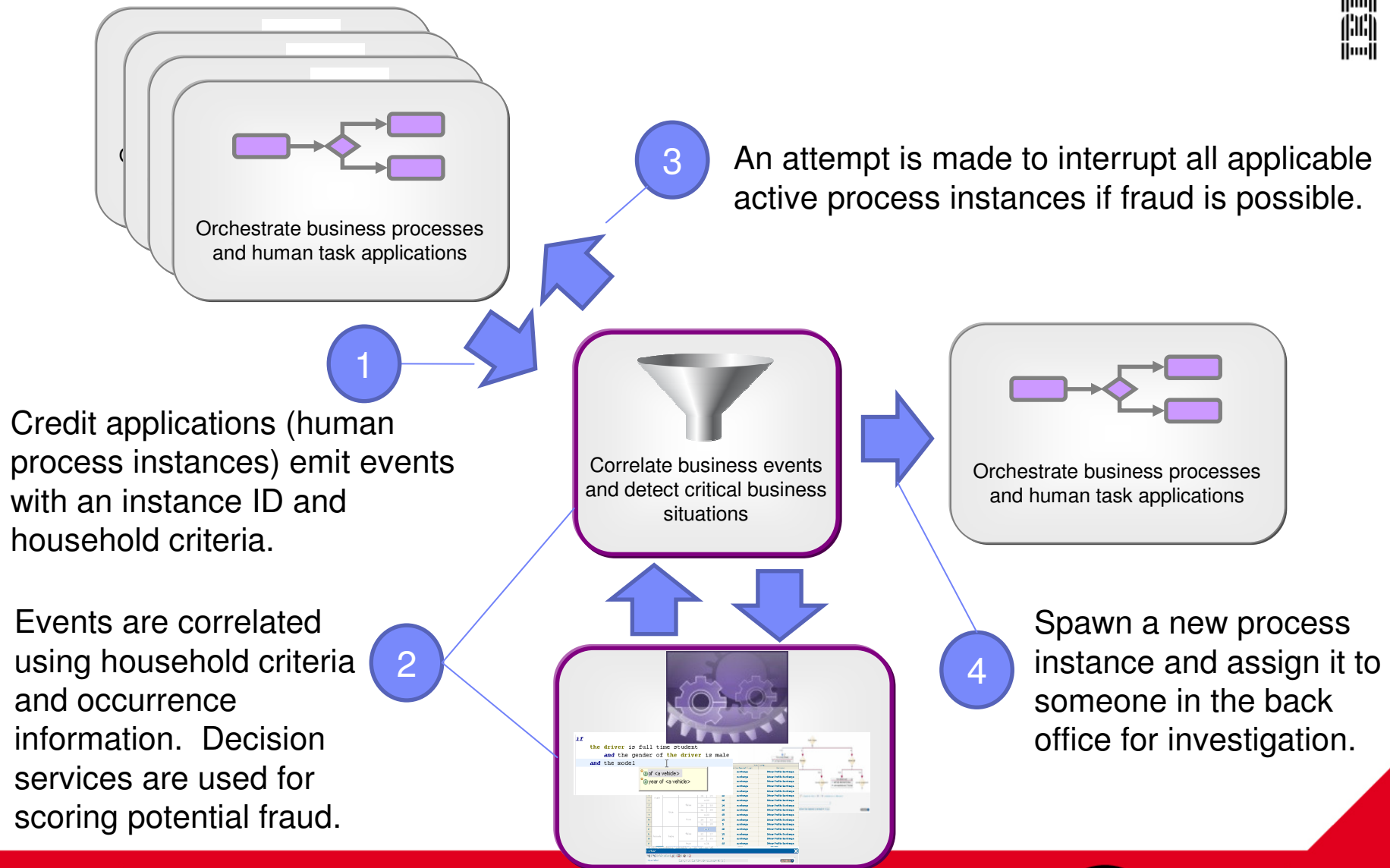
Key Technologies for Decision Agility & Effectiveness

- Business Event Processing improves situational awareness and response
- Business Rule Management improves the quality of automated decisions
- Business Process Management uses outputs within orchestrated processes
- Analytics enables continuous decision improvement

Derive deep understanding of data with analytics

Monitor and report on data to provide real-time insight

data

data

data

data

Event

Event

Event

Correlate business events and detect critical business situations

Orchestrate business processes and human task applications

Automate high-volume operational decisions with business rules

if
    the driver is full time student
        and the gender of the driver is male
    and the model

Fraud Use Case: Credit Card Applications

Orchestrate business processes and human task applications

3 An attempt is made to interrupt all applicable active process instances if fraud is possible.

1 Credit applications (human process instances) emit events with an instance ID and household criteria.

Correlate business events and detect critical business situations

Orchestrate business processes and human task applications

2 Events are correlated using household criteria and occurrence information. Decision services are used for scoring potential fraud.

```
if
    the driver is full time student
        and the gender of the driver is male
    and the model
        of <a vehicle>
        year of <a vehicle>
```

4 Spawn a new process instance and assign it to someone in the back office for investigation.

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धन्यवाद
Hindi

多謝
Traditional Chinese

ขอบคุณ
Thai

Спасибо
Russian

Gracias
Spanish

Thank You
English

شكراً
Arabic

Merci
French

Obrigado
Brazilian Portuguese

Grazie
Italian

多谢
Simplified Chinese

Danke
German

நன்றி
Tamil

ありがとうございました
Japanese

감사합니다
Korean

Backup

How are Other IBM Products Connected?
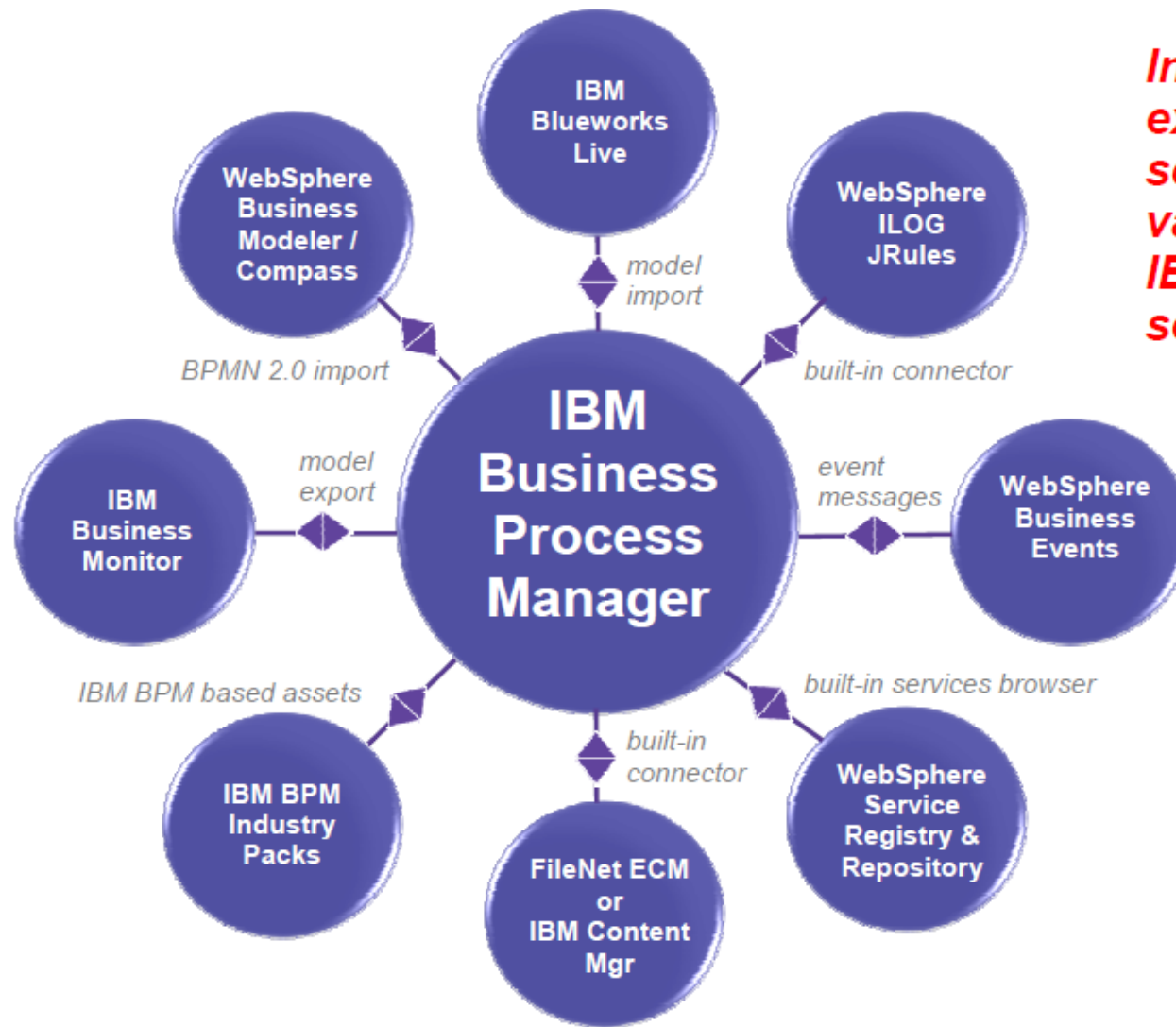
Integrations expand the scope and value of IBM BPM solutions

IBM Business Process Manager

- IBM Blueworks Live — *model import*
- WebSphere Business Modeler / Compass — *BPMN 2.0 import*
- WebSphere ILOG JRules — *built-in connector*
- IBM Business Monitor — *model export*
- WebSphere Business Events — *event messages*
- IBM BPM Industry Packs — *IBM BPM based assets*
- FileNet ECM or IBM Content Mgr — *built-in connector*
- WebSphere Service Registry & Repository — *built-in services browser*

What's new in IBM BPM 7.5 for Lombardi Customer ?
Federated Task Management

- Single view of all tasks across BPM and BPEL engines

- Federate search and filter of tasks

- Single API layer