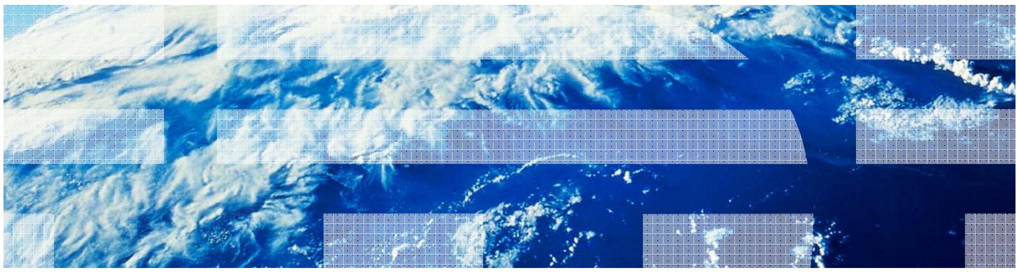
IBM Operational Decision Manager V8.0.1

Introduction to Decision Center Business Console



The Decision Center provides the web-based environment for non-technical users to manage and administrate their business rule projects.

The Business Console is one of the Decision Center web interfaces that enables the regular business users to work on the rule project development in a social collaborative environment.

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- Basic functions
- Key features
  - Quick navigation
  - Team collaboration
  - Project management
  - Rule management
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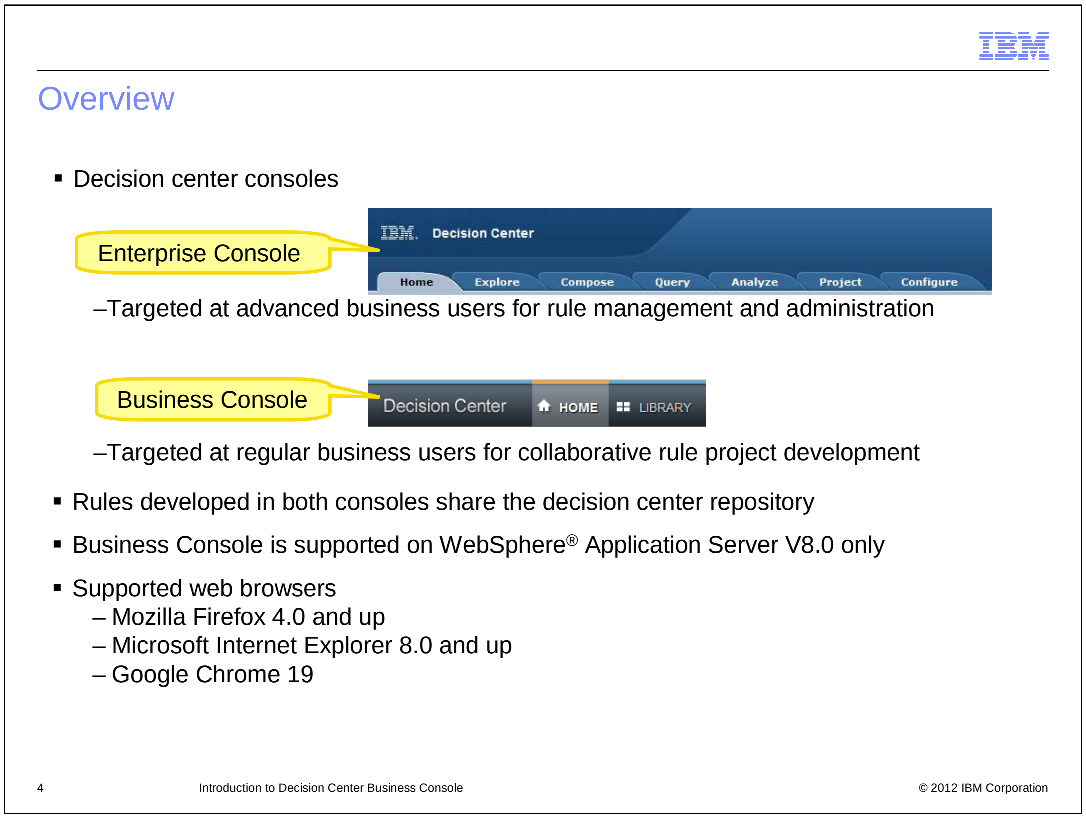
  - Search capabilities

The presentation starts with an overview of the Business Console and an introduction to its basic functions.

Then you learn about various key features on how to manage and develop rule projects.

Business Console overview and basics

This section will discuss the overview and the basics in the Business Console.



There are two web consoles in the Decision Center.

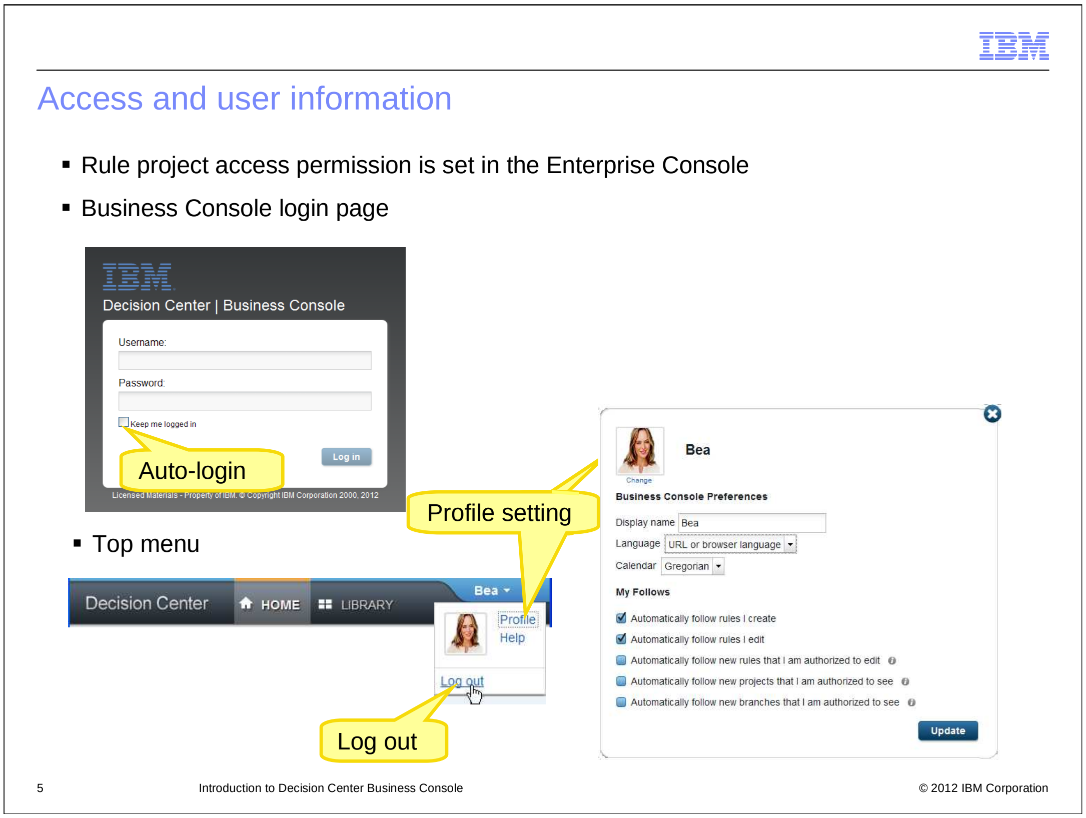
The Enterprise Console, which is the heritage console in Decision Center, is targeted at advanced business users for rule management and administration. The business analyst or administrator can author and review the rules, manage rule releases, validate the rules by performing testing and simulation, and deploy business rules to the production system. In addition, the administrator can configure and maintain the Decision Center repository, including the access control.

The Business Console, introduced in version 8.0, is targeted at the regular business users to collaboratively develop the rule projects. By focusing on the rule development with social theme, the new business-friendly interfaces make the rule development more productive.

All decision rules are stored and shared in the decision center repository, regardless of the web tools used to access them.

Note that the Decision Center can be installed and configured on a WebSphere Application Server profile, or on other supported application servers. However, the Decision Center Business Console is supported on WebSphere Application Server V8.0 only.

The business users can use their favorite web browsers to work on the Business Console. The supported browsers are Mozilla Firefox version 4.0 and up, Microsoft Internet Explorer 8.0 and up, and Google Chrome 19.



The administrator uses the Enterprise Console to grant other business users the access permissions at the rule project level or even the project elements level. The available projects are visible to the business user on the Business Console Library page.

On the Business Console login page, if you check the option “Keep me logged in”, you are automatically logged in as the same user the next time you access the Business Console.

After login, you can see that the top menu of the Business Console is organized into a Home tab , a Library tab, and a user name banner. The Home page is displayed when you login. You can click the Library tab to list all the projects that are available to you.

When you click the user name banner, a popup menu is displayed. You can choose the Profile link to set personal preferences and automatic activities following. You can also access the online help and logout of the Business Console.

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Accessibility

- Supports for disabilities:
  - Physical disability
  - Low vision
  - Blindness
- Full accessibility support
  - Keyboard navigation
  - Text alternatives for non-text content
  - Error identification, prevention, and suggestion
  - Sufficient contrast between text and background colors
  - Understandable content without blinking or flashing content
  - Navigable by a screen reader

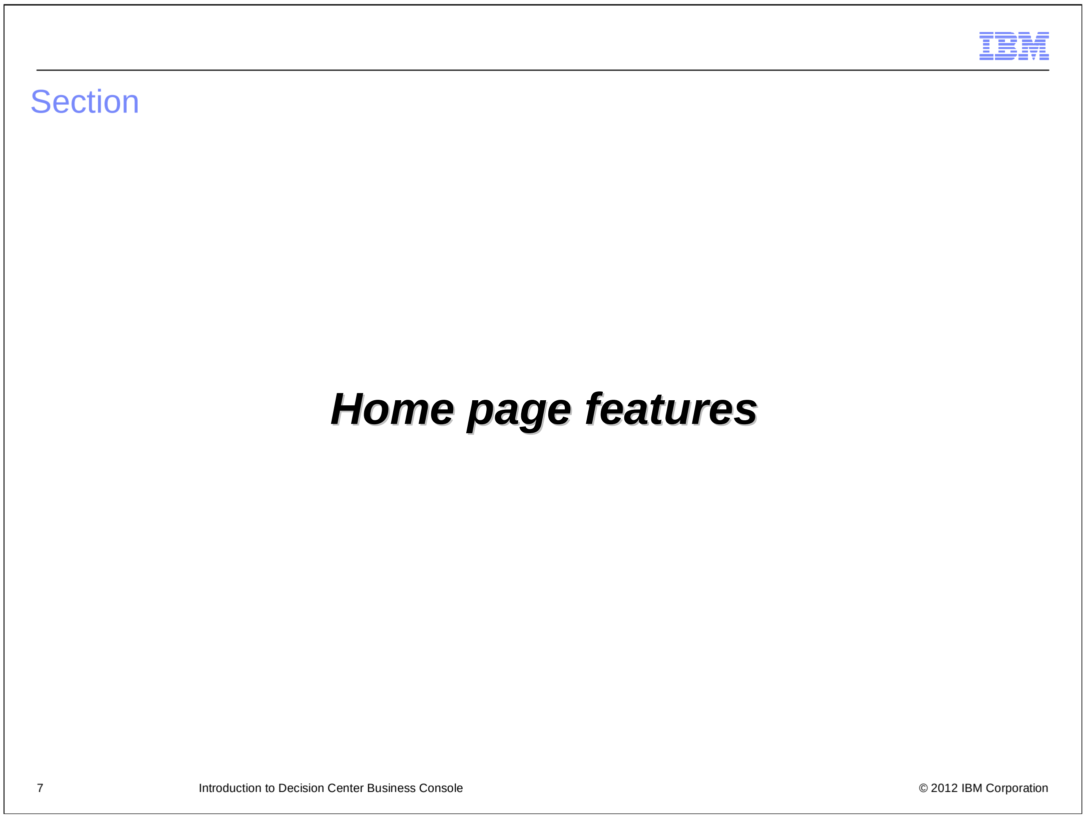
The Business Console is fully accessible to support disabilities like physical disability, low vision, and blindness.

The keyboard navigation enables the business user to navigate through all the pages, sections, and icons easily.

For the non-text content, such as images and icons, the alternative texts are provided to help sighted users to understand the same meaning. It also helps the screen reader to interpret the image.

The errors are presented in an accessible manner. They can be easily identified and preventable. The messages are intuitive and efficient.

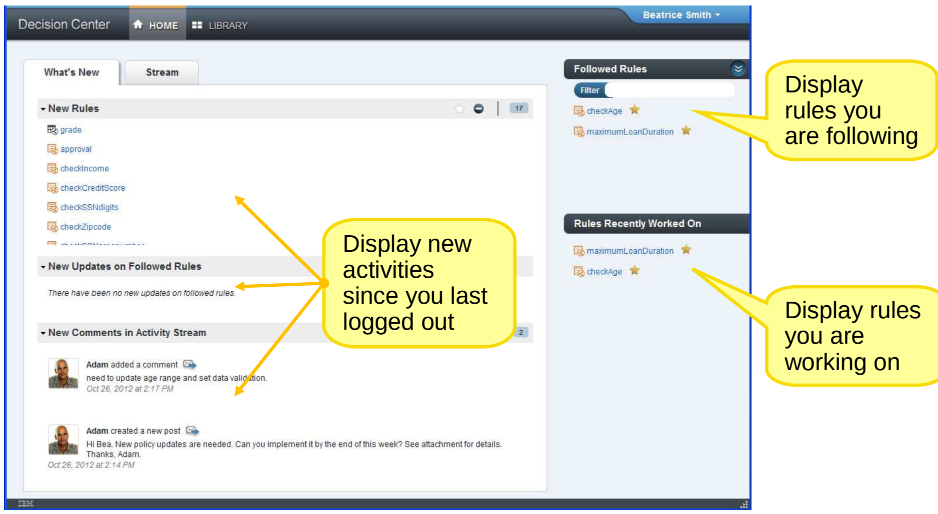
Other features include sufficient contrast between text and background colors to help low vision and color blindness people read without difficulties. There is no blinking or flashing content and all the pages can be navigable by a screen reader.



The first thing you will see after login is the Home page.

What's New page

- Gives you quick access to the key interest areas you normally work on

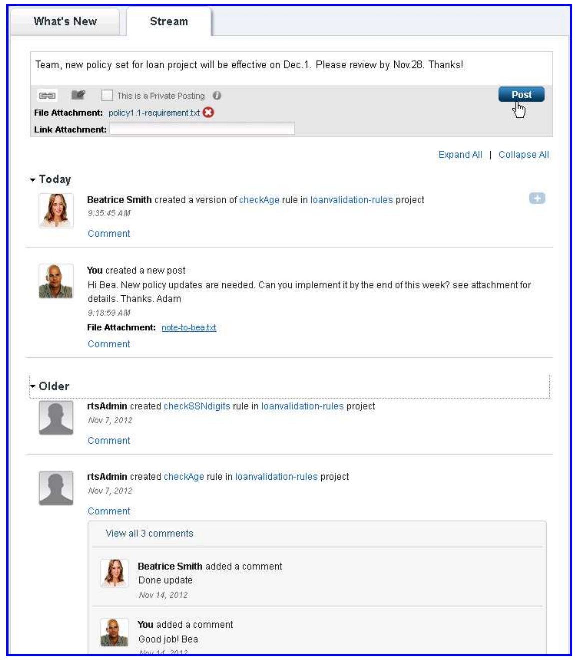


The Home page is designed to give you quick access to the key interest areas that you normally work on. It displays, from most recent to oldest, items of interest in the What's New and Stream pages. On the right panel, there are additional Followed Rules and Rules Recently Worked On sections.

The What's New page contains three sections. They display all new activities since you last logged out. The New Rules and New Updates sections list all new and updated rules in the projects you are following or you have visited. In the New Comments in Activity Stream section, you can see most recent public posts and comments from your team.

Stream page

- Shows the activities that took place on project items that you are following
  - Activities include: creation, update, deletion, and post
- Enables the collaboration on assets of interest and change notifications
- Engages in a conversation with your colleagues through comments



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The Business Console provides a social stream feature that you use to follow activities and interact with others.

The Stream page displays all the activities that took place on projects, branches, and any items that you are following, in the reverse chronological order. The activities include the items that were created, updated, or deleted, and the posts.

The information on the Stream page enables the team collaboration on your interested assets and change notifications. The comments are threaded so you can engage in the conversations with your colleagues easily.

Section

Library page features

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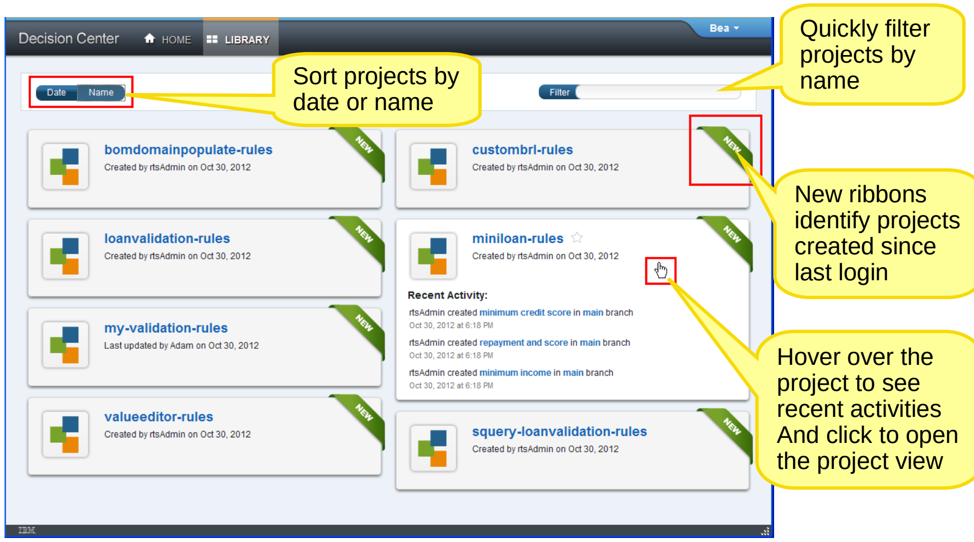
Next to the Home page tab is the Library tab. The Library page displays the projects that you are entitled and authorized to review and work with.

Project library



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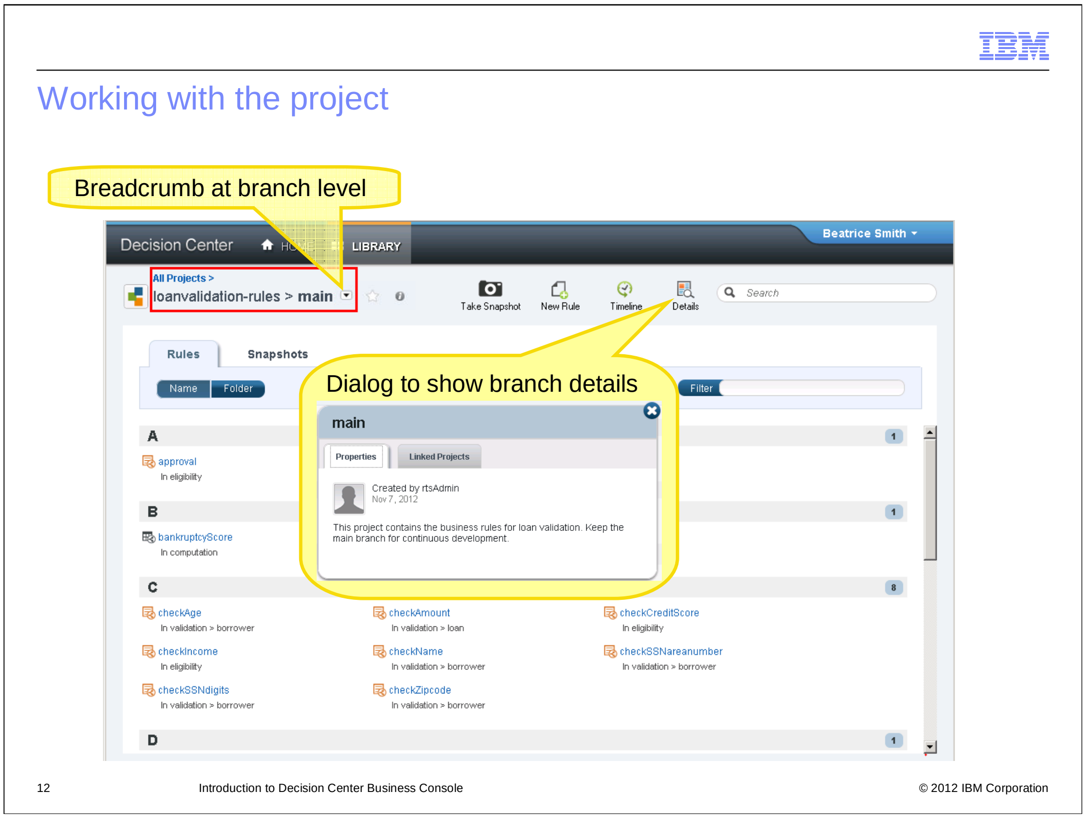
By default, the Library page displays all the projects that are available for you. To help you quickly locate the project you want to work on, especially in cases where many projects are available, you can sort the projects by date or by name. You can also enter the text in the Filter box to display only project names that contain the text.

Any new projects, that were created since your last login, are clearly marked with the "New" ribbon, allowing users to easily identify them. When you hover the mouse over a project area, it is expanded to show the recent activities. Once you decide to work on the project, click in the project area to open the project view.

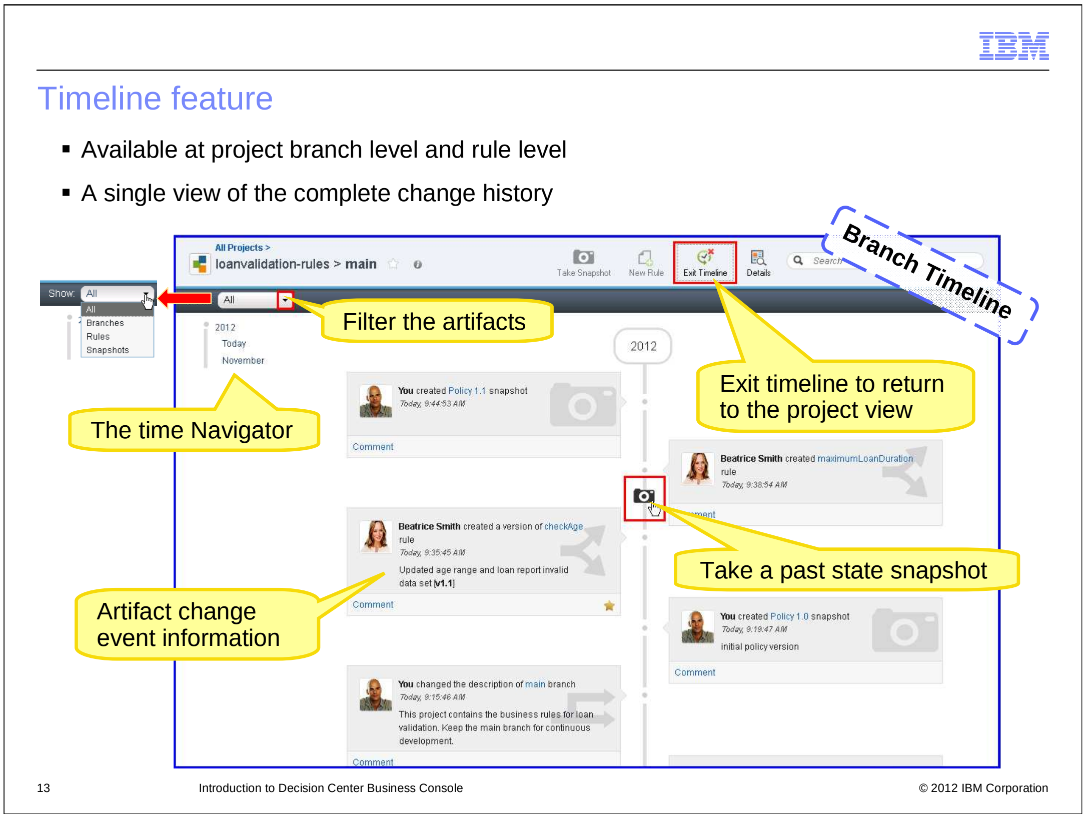


The project view is your starting point for the rule development and management.

The breadcrumb displays the project name and the current branch name. You can use the drop down arrow beside the branch name to switch to another branch to work on. You can click the star beside the drop down arrow to subscribe to all the activities in the current branch.

Using the toolbar icons, you can create a snapshot based on the latest branch state, create a rule, access the branch change history timeline, and check the branch details. In the branch details dialog, you can update the description and check if any other projects are linked to this branch.

The main content of the project view lists the rules and the snapshots of the current branch. You can use the filter box to quickly find the rule or snapshot based on the name.



The timeline allows the business users to get a single view of the complete change history for a project branch or a specific rule.

Here is a screen capture of a project branch timeline. It lists the change events for the branches, rules, and snapshots. In the view, you can see their different watermarks. The recorded events for those artifacts include create, update, delete, rename, and restore, whichever is applicable.

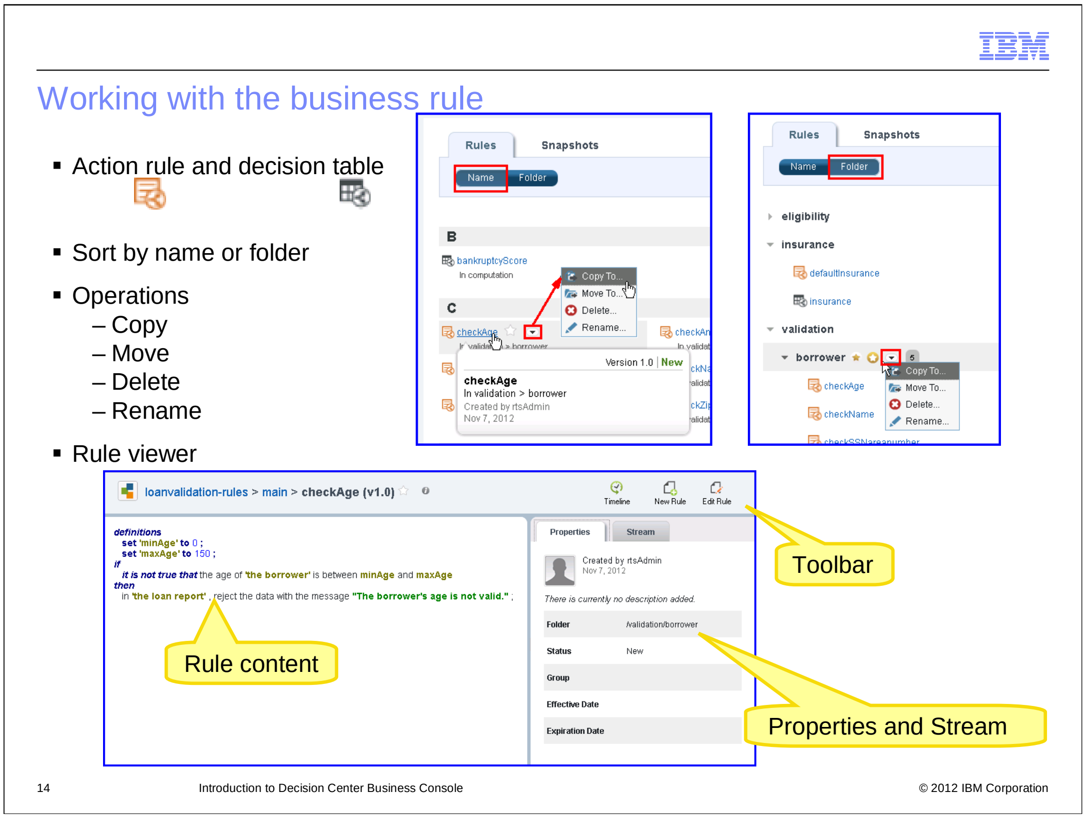
By default, the timeline shows all events from all the artifact types. The most recent events are at the top of the main content view. You can choose to show events from certain artifact types by using the dropdown menu under the project breadcrumb.

The time navigator on the left shows all of the event-matching time, including those not loaded in the main content area. Clicking a time in the navigator brings the corresponding events up to the visible area.

Each event is displayed as a separate entity along the timeline axis. The event shows the artifact name, the author's name, creation time, version number, and comments.

One special function in the project branch timeline is that you can take a snapshot at a certain point of previous time. It is called a past state snapshot. The past state snapshot can only be taken when you select to **Show All** from the artifact drop down menu. It guarantees all the displayed events are consecutive next to each other so that you don't miss any event when the snapshot is taken.

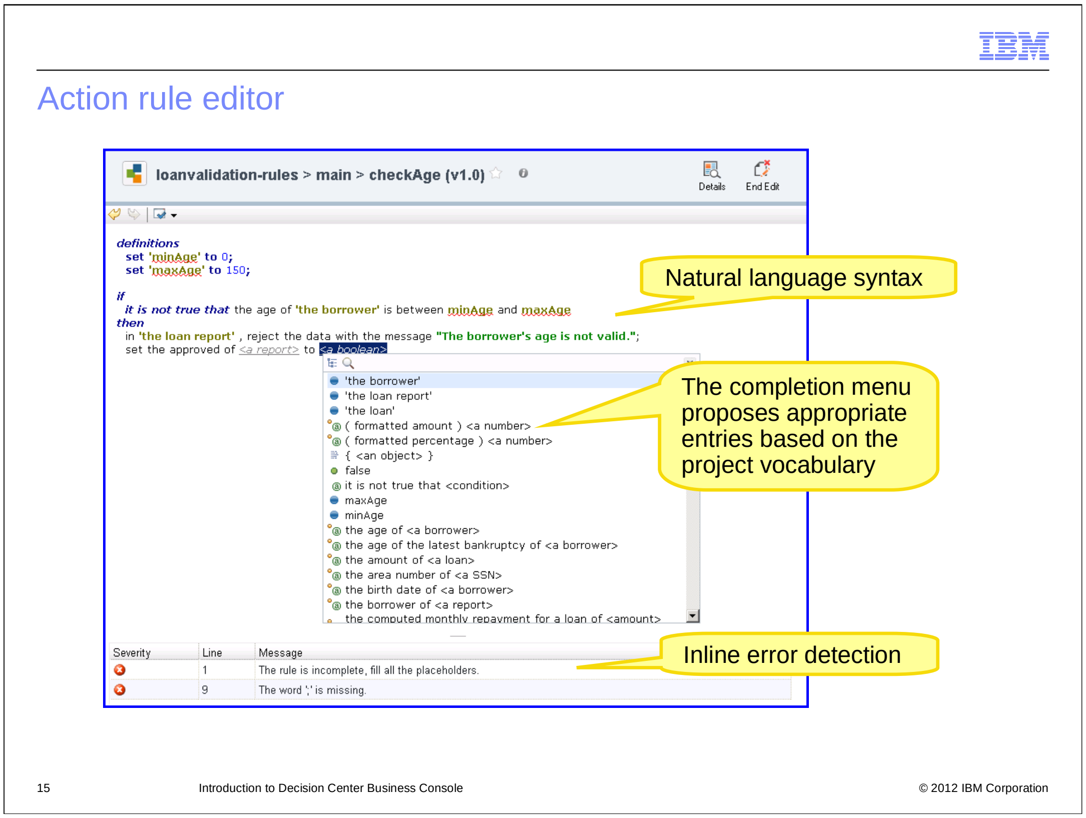
Clicking the **Exit Timeline** icon in the toolbar will take you back to the project view.



Text based action rules and decision tables are listed in the project Rules page. You can sort them by name or by folder. For both rule and folder, you can perform copy, move, delete and rename operations by using the drop down menu. You can also follow an individual rule or all the rules inside the folder by enabling the star next to the name.

To view the brief property of the rule, just hover the mouse over the rule name. Clicking the rule name opens the rule viewer page.

The rule viewer is loaded with the latest version of the rule content. The right panel shows the properties and the stream related to the rule. Using the toolbar icons, you can view the rule timeline with visual representation of the various versions, create a new text based action rule or decision table, and start editing this rule. A new version number is automatically generated once you save the changes.



When you edit a rule, other users trying to edit the same rule are advised that the rule is locked by you.

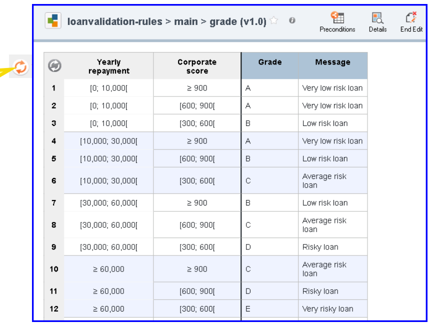
The action rule editor, as known as the Intellirule editor, lets the rule developers to capture decision logic in a natural language.

During the rule writing, they are assisted with automatic completion capabilities, thus reducing the risk of typos and mistakes. Possible next sentences are displayed depending on the context and what has already been typed. At any time during the rule authoring, the errors are detected dynamically. The error list is updated as soon as the rule developer progresses in the rule writing.

Decision table editors

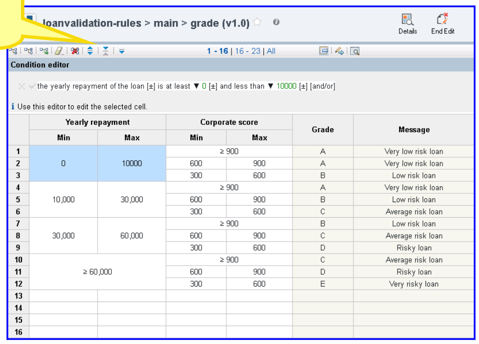
- Automatic row ordering
  - Table-like format
  - Direct edit in place
  - Define column condition using Intellirule editor
  - Single click to optimize row ordering and auto-partitioning

Optimize row order



- Manual row ordering
  - Spreadsheet-like format
  - Edit functions are available on the toolbar
  - Define column condition using Guided editor
  - also available in Enterprise Console

Manually move row



The Business Console has two decision table editors. One works with automatic row ordering to simplify editing, while the other retains the row order set by the business user. When launching the decision table the first time in the Business Console, you are asked to choose which type of editor you want to work on.

The automatic row ordering editor has table-like format. It provides pop-up menus for direct editing anywhere in a decision table. To modify the table precondition, column definition, and complex rule expression, you use Intellirule editor which provides completion menu assistance and error detection. By clicking the orange Optimize row order icon on the top left corner of the table, the decision table rows are automatically ordered and partitioned.

The manual row ordering editor is more spreadsheet-like. The editing functions are offered through the top toolbar section. The middle section is for you to set the condition column definitions or action column definitions by using the Guided editor. You manage the row ordering manually by using row move up and move down functions from the toolbar. This is the legacy editor also available in the Enterprise Console.

When you work with rules with large decision tables, using automatic row ordering makes it easier for you to group and organize. If your application runs the decision table rules based on the row order strictly, you have to use manual row ordering editor. Sometimes the application requires the table to list the rows in order of the usage frequency or maintenance. In those cases, manual editor is the better choice.

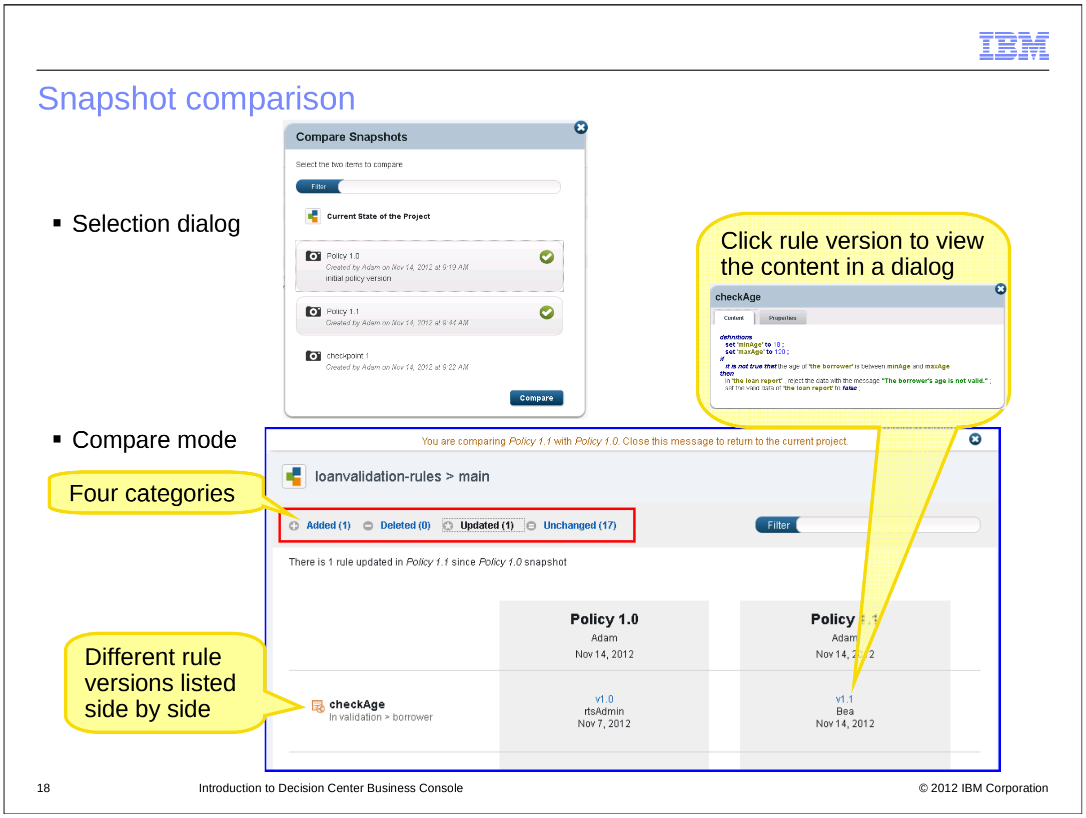
You can always switch the editor type by changing the setting in the decision table Details dialog.

Snapshot management

- Operations
  - Create
  - View
  - Rename
  - Restore
  - Delete
  - Compare
- Snapshot view
  - Read only

Business users capture the snapshots to store the rule project state at a specific moment in time. Each branch of a project can contain many snapshots.

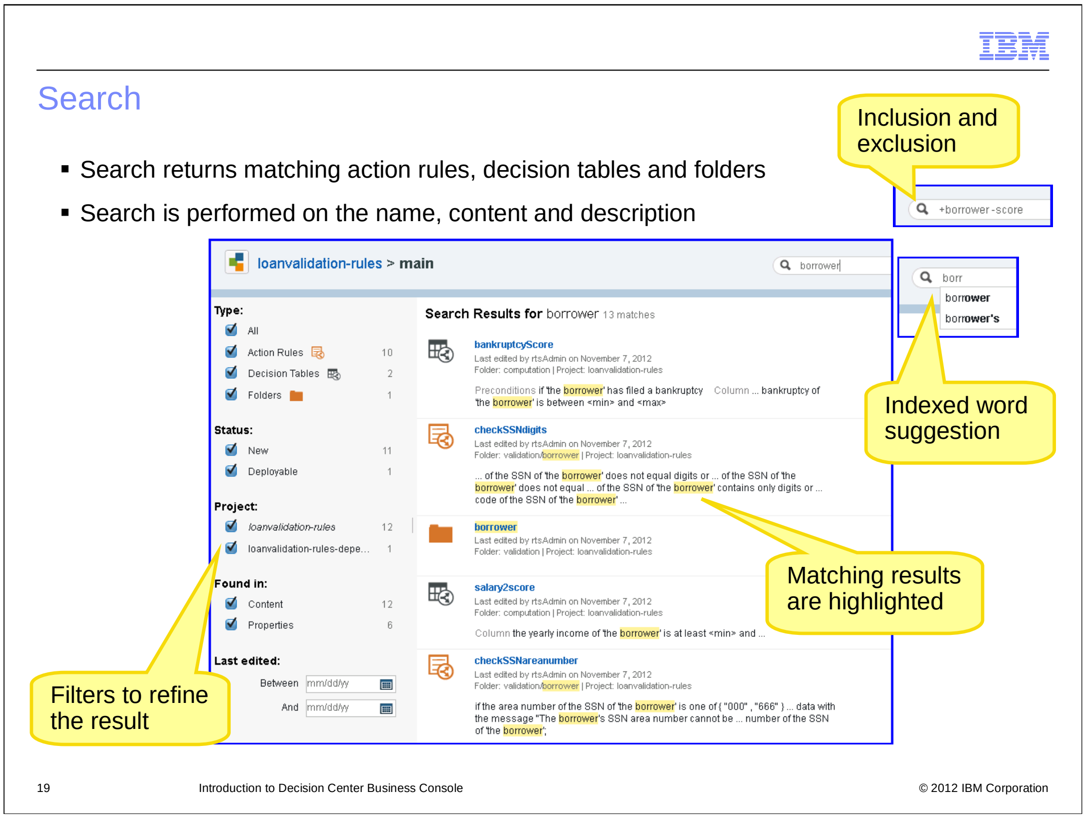
You can create snapshots, display existing ones for consultation, and compare different snapshots. You can also rename, delete, and restore a snapshot to the current state. When in the snapshot view mode, the rules are read-only. Clicking the rule opens its content and properties in a dialog.



You can select any two snapshots to compare their contents, including the past state snapshots and current state project.

In the compare mode, the rule differences are categorized into four groups: Added, Deleted, Updated, and Unchanged. When you click a category, the compare content is loaded accordingly. The rule with different versions are listed in the side-by-side columns.

When you click the rule version link, the read-only rule content and properties are shown in the dialog.



Very often, rule projects contain a large number of business rules. Users must be able to easily find a given rule very quickly.

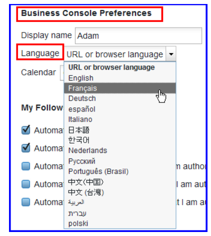
The Business Console provides powerful search capabilities to find a rule wherever the rule is stored in the project. There is no need to know how projects are organized and to which ruleset the rule belongs.

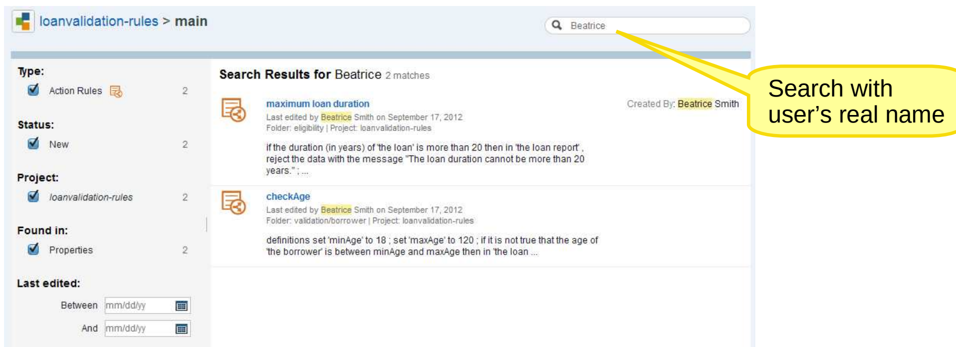
When you start typing in the search box, it provides you with indexed word suggestions as shown on the slide. You can also specify inclusion and exclusion conditions in the search box.

The search is performed based on the name, content and property of the rule or the folder. The search results display all the rule artifacts or folders with matching search terms highlighted. On the left of the search results page, you can apply a different filter to refine the results.

Additional search capabilities

- Search artifacts based on the preferred language set in the user's profile
  - Vocabulary needs to be translated
- Search artifacts across linked projects
- Search artifacts by user name





In addition, if your rule project has vocabulary translated in a specific language and you have set it as your preferred language in the profile, you can search rule artifacts based on your preferred language.

In Business Console, if multiple projects are linked, they are called linked projects. When you perform a search in one of the projects, the search results show all the matching artifacts across all the linked projects. The search also provides capability to search created or last edited rules based on the business user's login name or real name.

Summary

- Business Console: a collaborative social style web interface
- Home page:
  Quick access the interested rules and join social activities through stream
- Library page:
  – Manage rule project
  – Develop action rules and decision tables
  – Manage snapshots
  – Search capabilities

This presentation first gave you a brief overview of the Decision Center Business Console. Then it walked you through the basic functions and key features that enable the regular business users to work on rule project development collaboratively.

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