IBM Lotusphere Comes to You 2009

BPM Made Easy:

Looking Forward with Lotus Forms and the IBM® Business Process Accelerator

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Lotus. software

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Q & A

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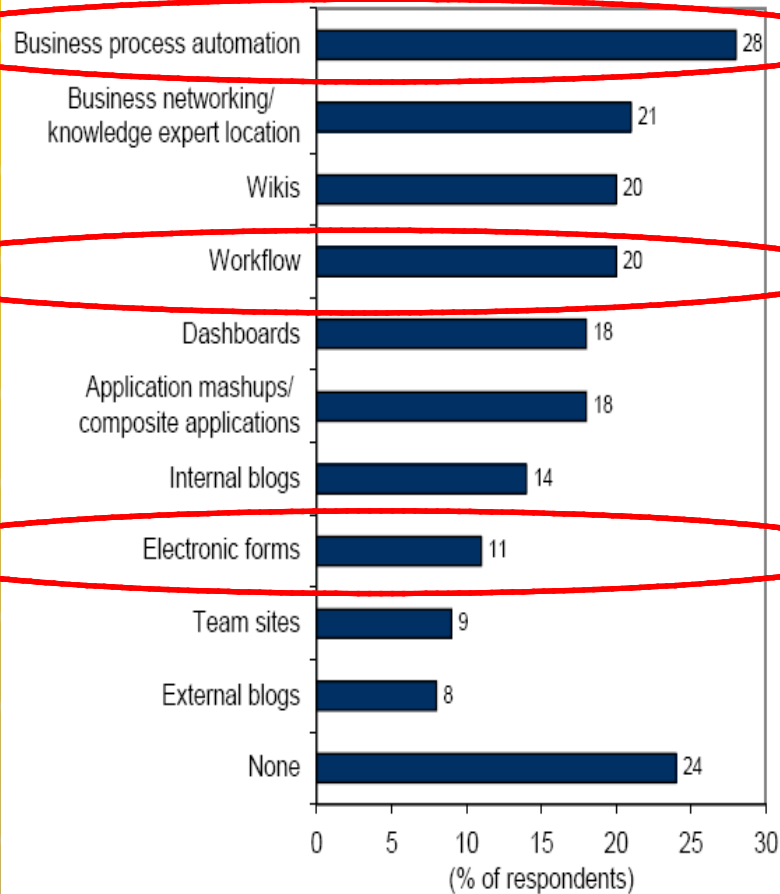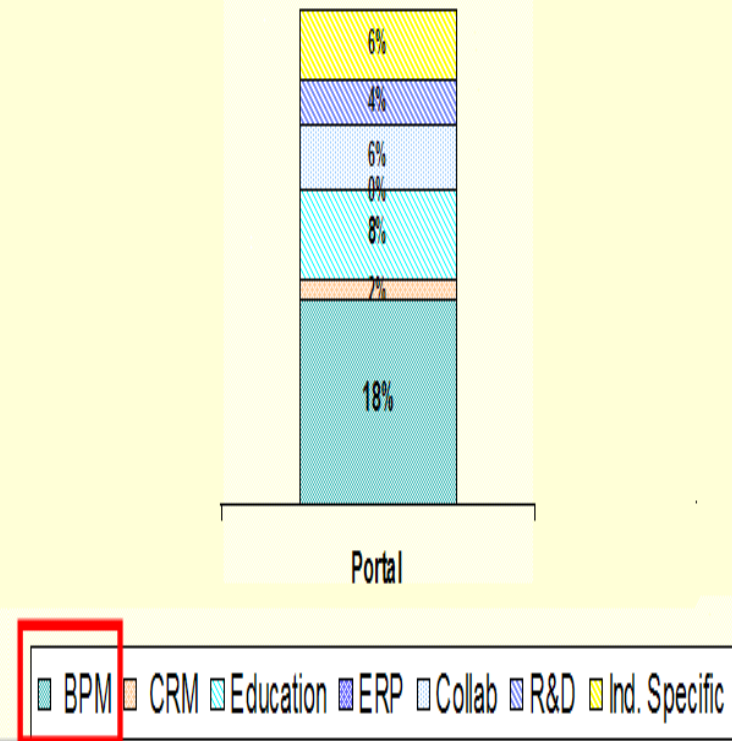
BPM is a top priority for IBM® WebSphere® Portal™ customers

Q. Which of the following features do you consider will be important to add to your portal(s) in the next 24 months?
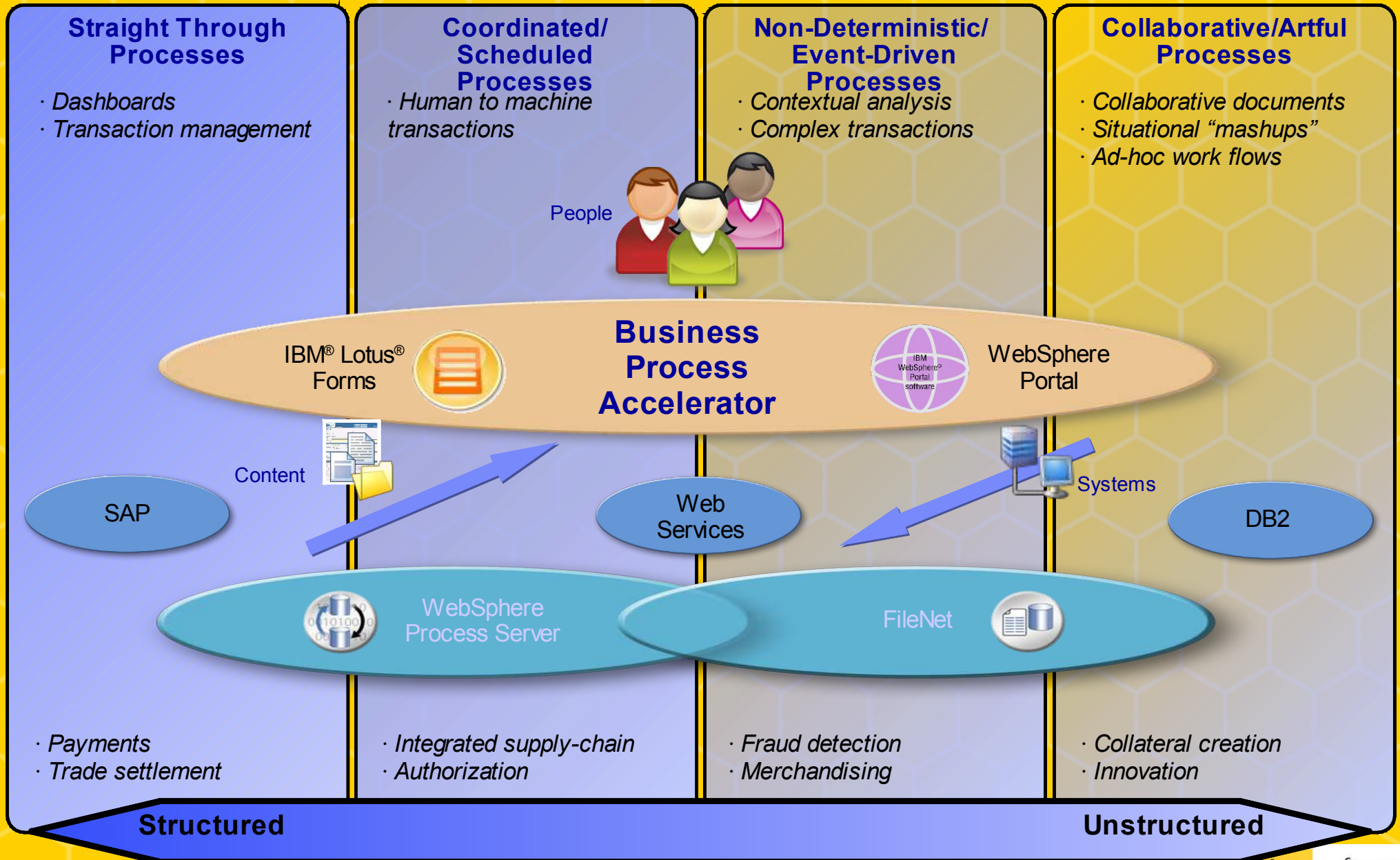
Feature	% of respondents
Business process automation	28
Business networking/ knowledge expert location	21
Wikis	20
Workflow	20
Dashboards	18
Application mashups/ composite applications	18
Internal blogs	14
Electronic forms	11
Team sites	9
External blogs	8
None	24

Applications supported by funding for Portal

- 6% — Ind. Specific
- 4% — R&D
- 6% — Collab
- 0% — ERP
- 8% — Education
- 2% — CRM
- 18% — BPM

Portal

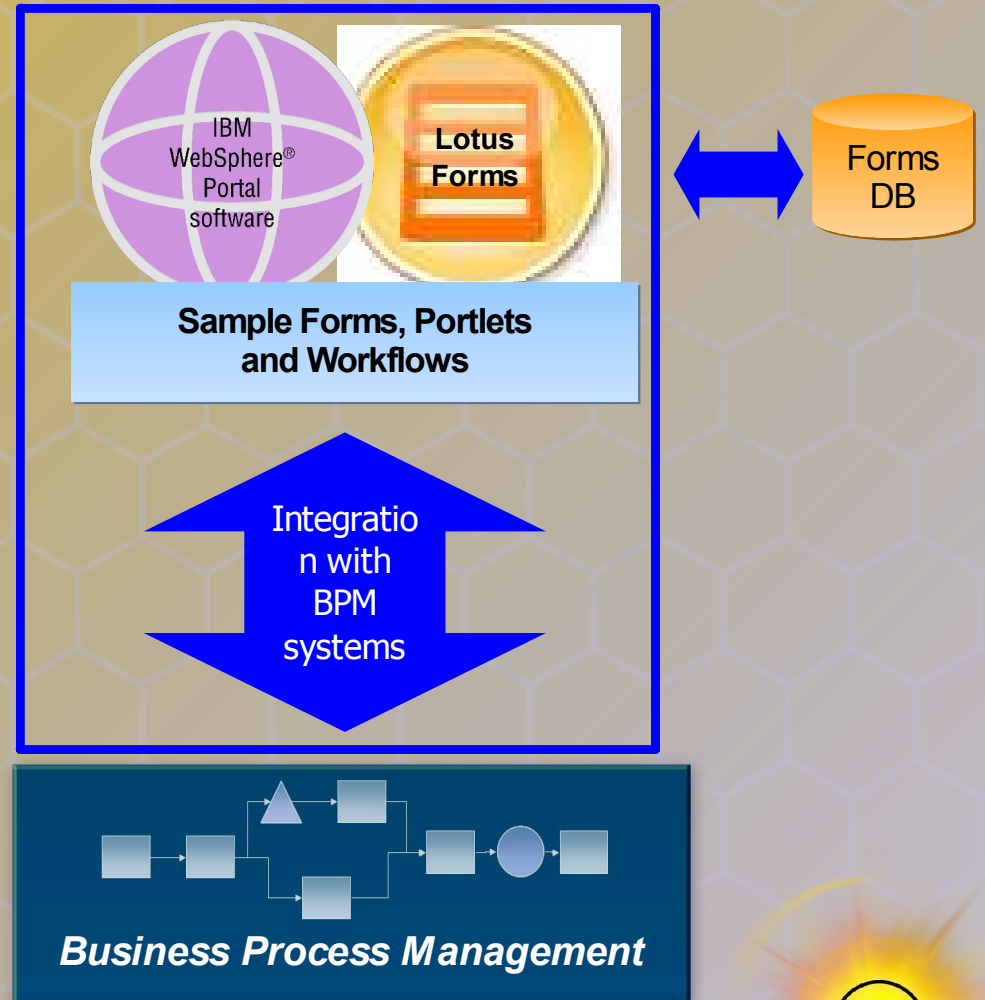BPM   CRM   Education   ERP   Collab   R&D   Ind. Specific

Source: WPLC MPA 1H 2007

"Roughly 20% of WebSphere Portal opportunity is BPM based.
83% of Portal customers use some type of Forms in Portal apps " - IDC

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The IBM® Websphere® Portal™ Business Process Accelerator provides a dynamic, integrated user interface for BPM

Straight Through Processes
- Dashboards
- Transaction management

Coordinated/ Scheduled Processes
- Human to machine transactions

Non-Deterministic/ Event-Driven Processes
- Contextual analysis
- Complex transactions

Collaborative/Artful Processes
- Collaborative documents
- Situational "mashups"
- Ad-hoc work flows

People

Business Process Accelerator

IBM® Lotus® Forms

WebSphere Portal

IBM WebSphere Portal software

Content

Systems

SAP

Web Services

DB2

WebSphere Process Server

FileNet

- Payments
- Trade settlement

- Integrated supply-chain
- Authorization

- Fraud detection
- Merchandising

- Collateral creation
- Innovation

Structured

Unstructured

WebSphere Business Process Accelerator

- **Empowers business users to take action in processes**
  - *User-friendly form interface to business processes in context of content and data to enhance decision-making*

- **Accelerates processes automation efforts**
  - *Starter set of sample forms, portlets and business processes*

- **Rapidly integrates with existing infrastructure, applications and data**
  - *New integrations for Lotus Forms 3.0.1:*
    - *WebSphere Process Server*
    - *WebSphere Integration Developer*
    - *WebSphere Business Modeler*
    - *FileNet Business Process Manager*

IBM WebSphere® Portal software

Lotus Forms

Forms DB

Sample Forms, Portlets and Workflows

Integration with BPM systems

Business Process Management

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WebSphere Portal Accelerators

"I need my teams to work together more effectively and efficiently, while easily accessing relevant corporate applications"

"I need to increase the value of my website by delivering real-time, personalized data based on user attributes"

"I need to deliver low touch or no touch processing of transactions – to customers, partners, or employees."
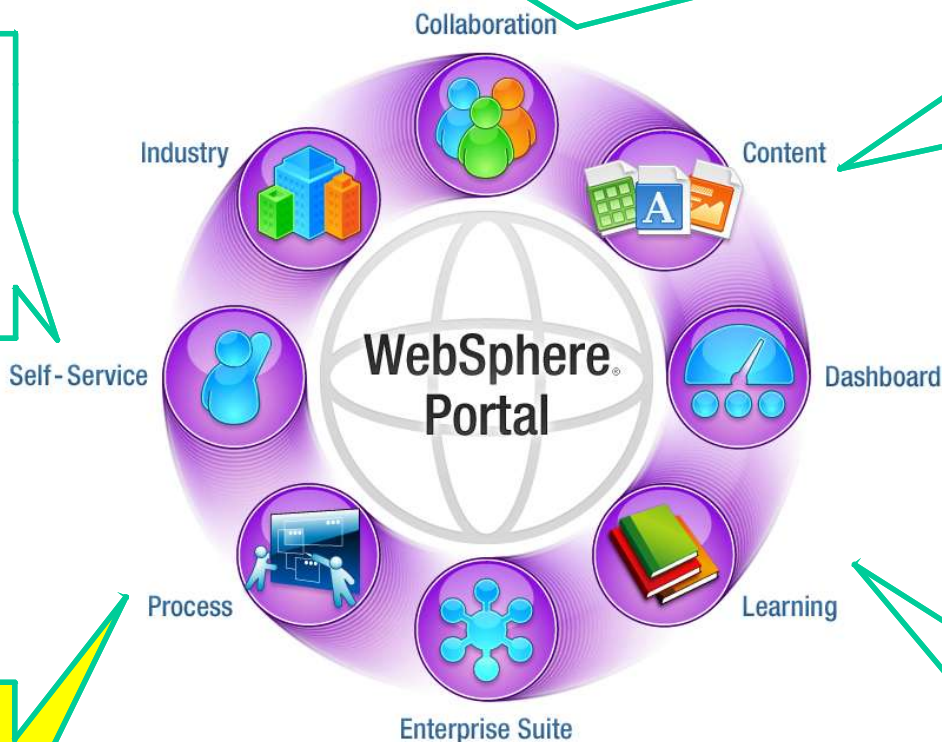
"I need to track my organization's goals and performance against them to more effectively drive results"

Collaboration

Industry

Content

Self-Service

WebSphere® Portal

Dashboard

Process

Learning

Enterprise Suite

"I need to deliver business processes to users in context with the information, applications, and data that they need to make decisions.

"I need a flexible IT platform where I can pick and choose those key accelerators needed for delivering my portal intranet, extranet, or internet site."

I need a cost effective way to deliver personalized, online training "just in time" within the context of my employees' ongoing activities

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WebSphere Portal

Portals

Partners

One Platform

Many Different Business Needs

Customer Experience

Company Intranets

Employee and Manager Self Service

Performance Dashboards

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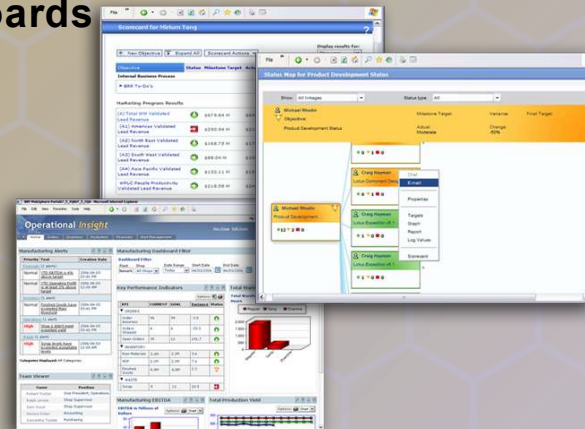
IBM WebSphere Portal:

- Flexibility to easily customize interfaces
- Rapidly Respond to Change
- Easy-To-Use Composite Applications
- Role based delivery of Applications
- Security Rich Mashups
- Portlet Palette & Enhanced Portlets
- Templates and Samples
- Highly Response Web 2.0 UIs - "desktop like"

Increase Productivity and Operational Efficiency

- IBM® Web Content Management
- Enhanced Configuration Management

"Forrester research has suggested that 80 percent of new application development is going to be in composite applications, rather than more traditional apps."

August 24, 2006 - Intranet Journal: IBM's New Portal Server Embraces 'Composite Applications', By: Tom Dunlap

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Openness Enables Flexibility

Standards-Based Integration

Clients

Web

Mobile Devices

Expeditor

REST

Services

Portlets

Web Content Mgmt

Web Services

REST Services

Google Gadgets

Feeds

Remote Portlets

HTML/PHP

Connections

Documents

composite applications

role-based

process-driven

in context

IBM WebSphere Portal

Multiple LDAPs

Multiple DBs

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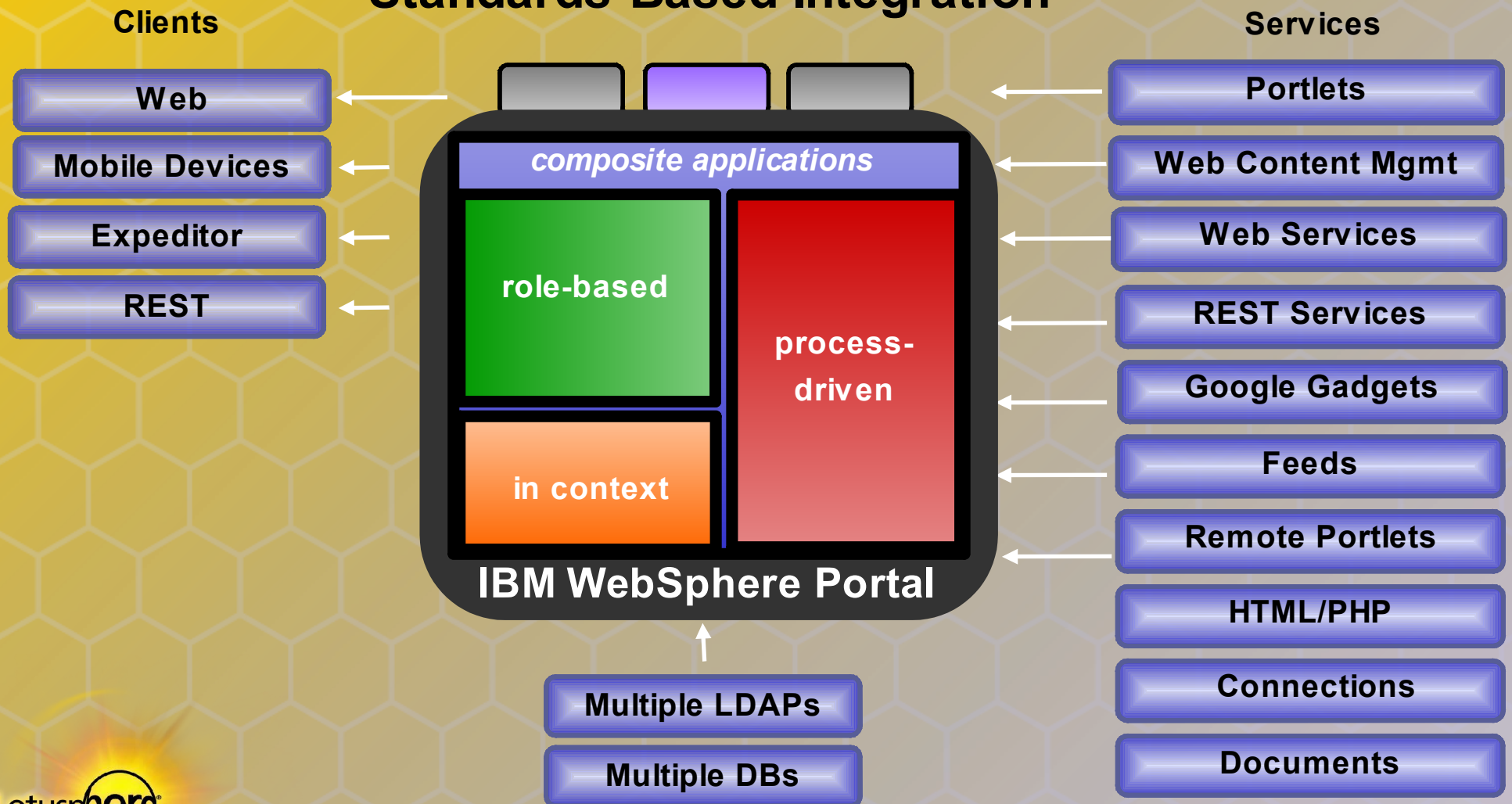
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A quick introduction to Lotus Forms.

Lotus Forms

Improves Organizational Efficiency
- A forms-based human interface for business process automation and SOA
- Deploys without the expense of client software
- Captures complete and accurate data at the source

Improves Customer Service
- Simplifies forms for users, saving time and effort

Increases Corporate Agility
- Helps develop new applications quickly and easily
- Facilitates business-to-business commerce using standard data formats
- Eases regulatory compliance by creating auditable transaction records

Lotus Forms

Lotus Forms Turbo

Lotus Forms Webform Server

Lotus Forms Viewer

Lotus Forms API

Lotus Forms Services Platform

Lotus Forms Designer
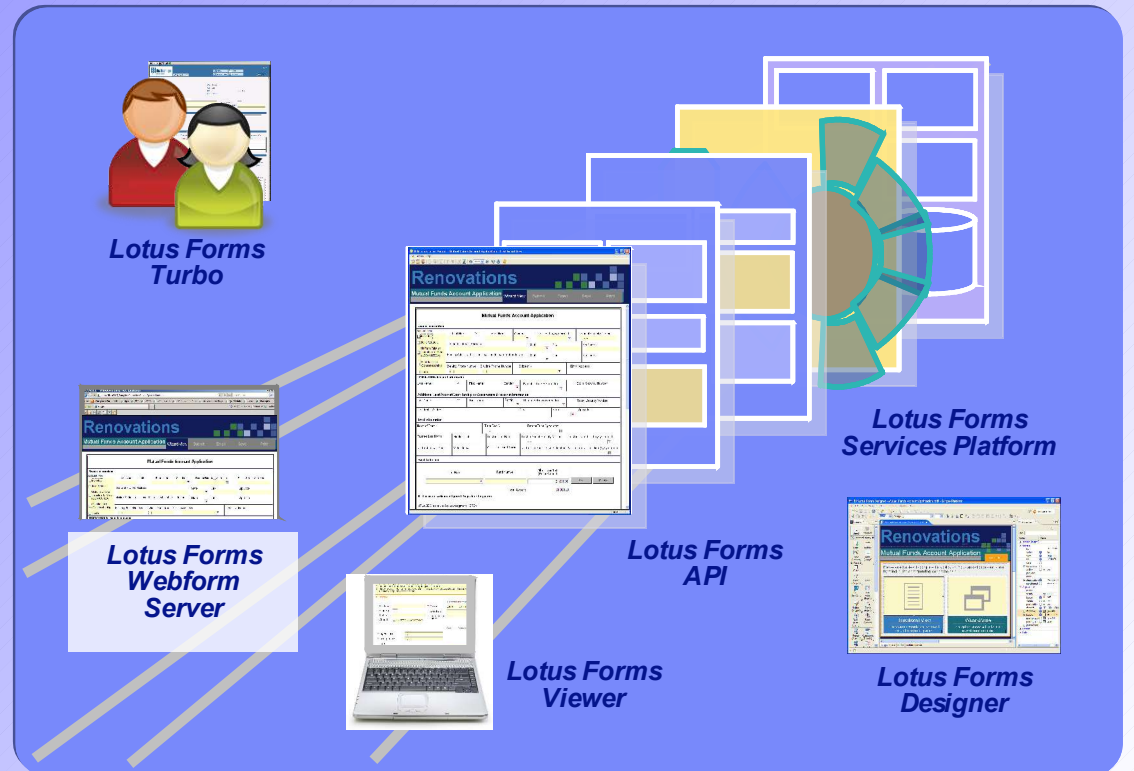
Lotus Forms is a complete solution for both business and it to extend, streamline and automate business processes.

"More than 80% of the processes in public and private businesses depend on forms." -IDC

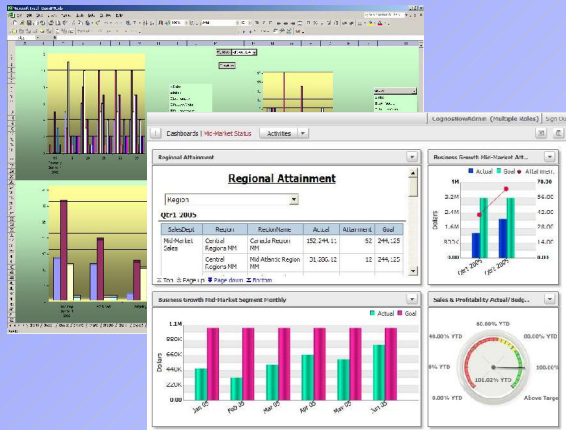Lotus software

IBM® FileNet® BPM:

Manage

Process Analyzer
· OLAP-based process analytics & reporting

Business Activity Monitor
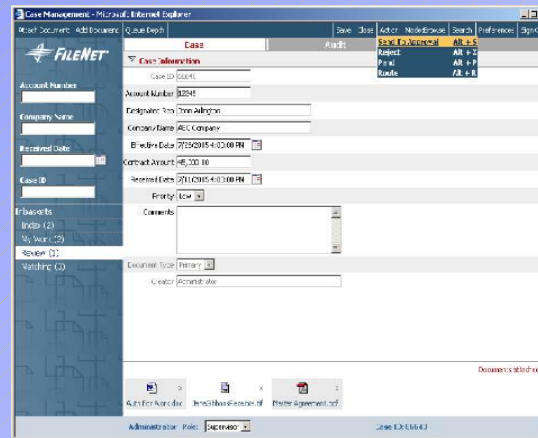· Real-time monitoring performance management

BPM Admin

Execute

Process/Content Engines
· Integrated process & content repository enabling active content

BPF
· The "Face on BPM applications"
· Leverages P8 process and content

Build

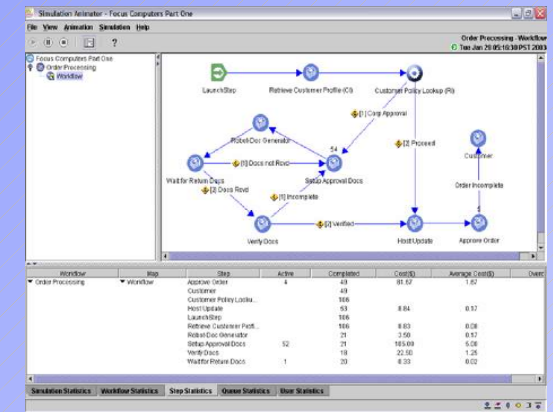### Process Simulator
· Identify bottlenecks

Process Designer
· Process design in XPDL

Process Modeler
· Process design using Visio

BPF
· Configure instead of code

"FileNet's BPMS is Unbeatable at the Intersection of Content and Processes"
- Forrester Tech Note, Feb. '06

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IBM WebSphere BPM:

IBM® WebSphere® Business Modeler (Business Analyst)

· Model Business Processes
· Simulate/Optimize Business Processes

· No programming experience required
· Focus on performance & process
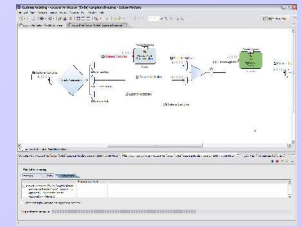
IBM® WebSphere® Integration Developer (Integration Developer)

· Assemble Business Process (BPEL)
· Generate WSDL

· Some basic programming experience (loops, conditions, string manipulation)
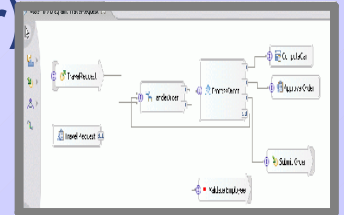
IBM® WebSphere® Process Server (Runtime Environment)

· Executes standards-based (BPEL) business processes
· Process flows, human tasks, state machines, and ESB capabilities
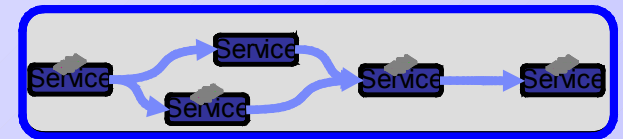
IBM® WebSphere® Business Monitor (Process Monitoring)

· Monitor metrics, business situations, events and activities in real-time
· User customizable dashboards ensure targeted, relevant information
· Business event notification - Alert subscriptions and personalization

"IBM is a leading company in BPM with its breadth of technology, including WebSphere Business Modeler (WBM), WebSphere Process Server, FileNet BPM and WebSphere Business Monitor. – Gartner Group

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Why are our customers doing BPM?

Improve operational efficiency by integrating cross functional business processes

- Increased competitiveness through reduced transaction cycle times
- Extend processes "beyond the firewall" to partners and customers

Facilitate agility, flexibility and continuous process improvement

- Processes are modeled and process execution is measured
- Rules-based processes enable continual process improvement

Reduce infrastructure TCO

- Encourage re-use of process and service components
- Leverage existing application infrastructure
- Reduce cost of integrating new systems and processes

The business landscape is global and rapidly changing. Business today must be more efficient, competitive and and agile than ever before.
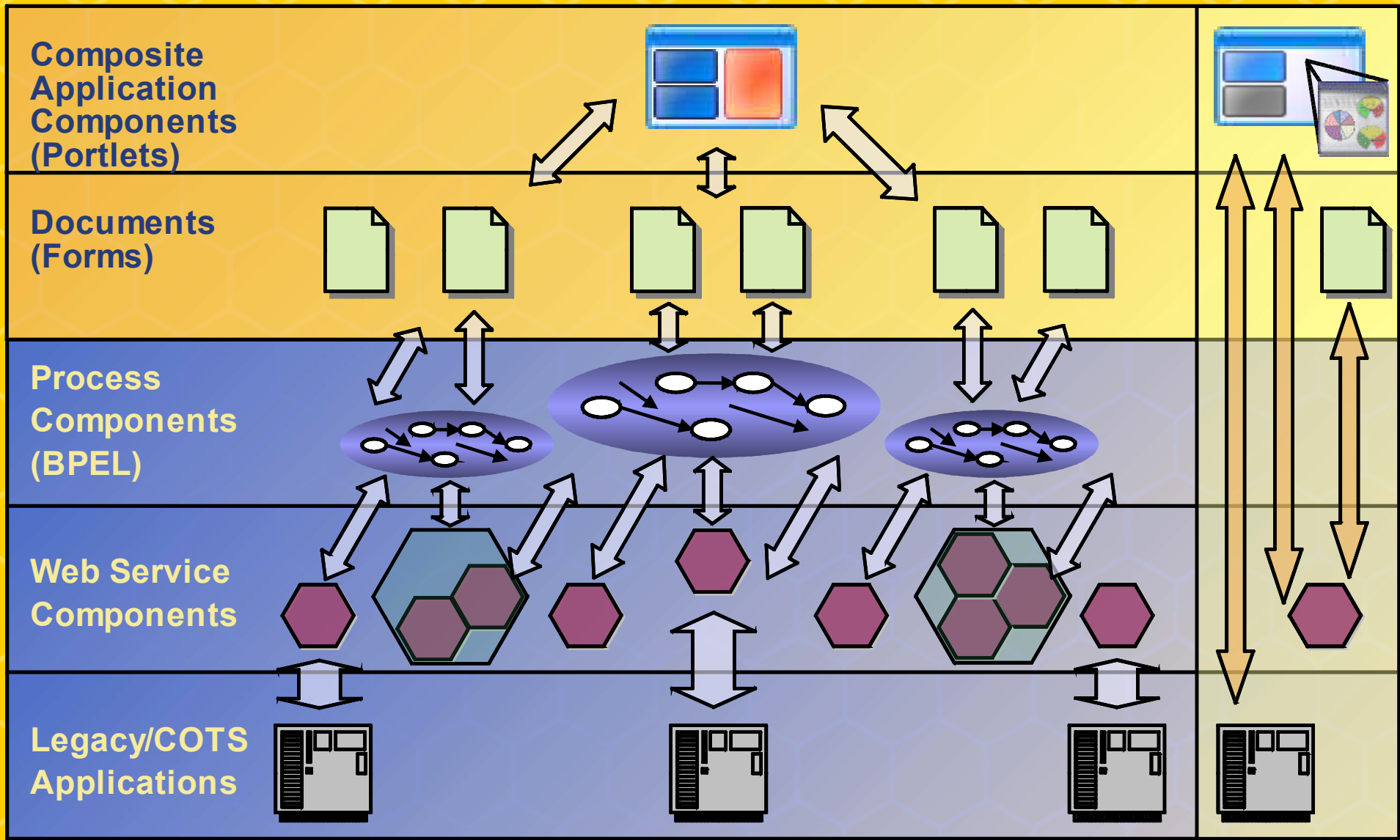
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Accelerating the value of BPM:

Improving operational efficiency by integrating cross functional business processes

- Portal integrates **both functional and process-based** application components "on the glass"
- Inter-portlet communication provides data/behavioral integration
- Presents work in context to enhance decision-making and improve efficiency

- Forms unify multiple transient data sources into single document interface
- Eases regulatory compliance by creating *transactional records across multiple transient data sources – including Web Services*
- Document-centric records can be signed with multiple overlapping signatures for high-value commerce

Both Portal and Lotus Forms make it easier to create business processes that span multiple applications and architectures.

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An architecture of reusable assets:

Composite Application Components (Portlets)

Documents (Forms)

Process Components (BPEL)
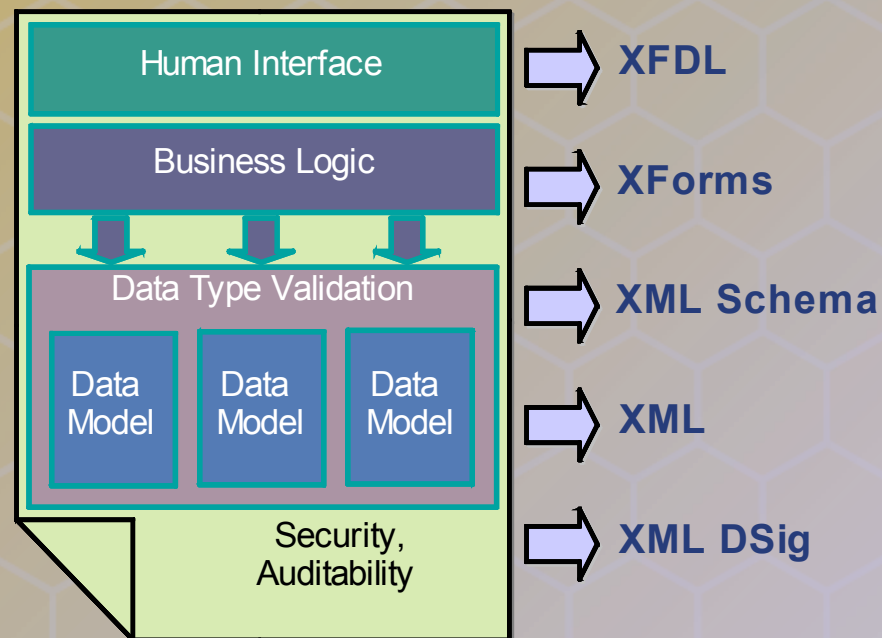
Web Service Components

Legacy/COTS Applications

By adding WebSphere Portal and Lotus Forms to a BPM deployment, the UI and application components become reusable assets – and new possibilities for systems integration emerge.

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Accelerating the value of BPM

Improve operational efficiency by integrating cross functional business processes

- **Forms facilitate applications that span multiple administrative domains**
- **Forms are messages that can be consumed by both humans and systems**
- **Can enforce data quality/business rules across varying qualities of system implementation**
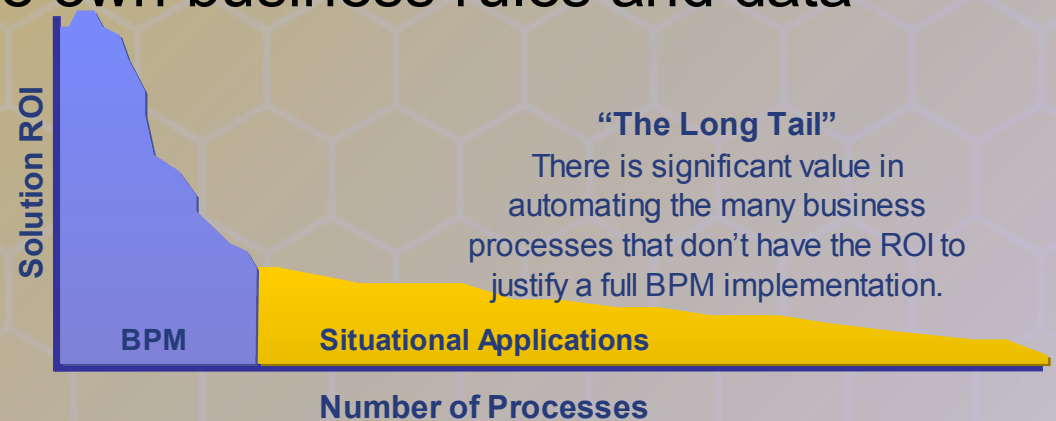- **Can present different data "views" to different services**

Human Interface	→ **XFDL**
Business Logic	→ **XForms**
Data Type Validation	→ **XML Schema**
Data Model / Data Model / Data Model	→ **XML**
Security, Auditability	→ **XML DSig**

Forms act as "intelligent message objects" which enforce own business rules and data integrity

Why BPA?

Facilitate agility, flexibility and continuous process improvement

- Lotus Forms' document-centric approach allows *easy ad-hoc routing*

- Form "objects" can be pulled and routed outside the workflow

- Processes can span both on-line and disconnected workers

- Documents enforce own business rules and data validation

- Portal allows users to *tailor their application environment* to suit personal/situational variations

Solution ROI

"The Long Tail"
There is significant value in automating the many business processes that don't have the ROI to justify a full BPM implementation.

BPM   **Situational Applications**

Number of Processes

"The ability to change is far more prized than the ability to create in the first place." Business Process Management - The Third Wave Howard Smith & Peter Fingar

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Why BPA?

Reduce infrastructure TCO

- Lotus Forms enables *rapid development of human tasks*
- Advanced, Eclipse-based design environment
- Conversion from scanned forms or office documents (PDF)
- Lotus Forms are *reusable UI assets* that can be leveraged throughout the enterprise
- Portal enables *reusable functional assets* (portlets) that can be consumed in different application contexts
- Standards-based approach ensures *ease of integration/ future proofing*
- Lotus Forms – XML, XForms, XML DSig
  - Portal – JSR 168, 286 (portlet)

Forms and Portal promote the creation of reusable, standards-based assets that shorten development cycles and reduce infrastructure costs.

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Use Case Patterns

Seven simple, broadly applicable use case patterns were identified:

1. Request for Submission – An invitation to submit a proposal on a specific opportunity:

- Request for proposal
- Request for quote
- Request for information

2. Approval – A document is routed through one or more decision makers in an approval/rejection process:

- Vacation request
- Expense report
- Purchase request
- Change request
- Request for transfer
- Request for promotion

3. Survey - Collecting structured information from a group of respondents:

- Market survey
- Employee satisfaction survey
- Census
- Site visitor survey
- Service quality audit survey
- Instructor assessment

4. Application - A set of documents are submitted and one or more selections are made from amongst them:

- Employment application
- Grant application
- Bid or proposal

5. Notification/Report/Filing - A means of delivering notification and recording information when a business event occurs or information changes:

- Court filing
- Change of address
- Notice of separation
- Performance appraisal

6. Transaction Records – A record of an agreement between parties usually involving the exchange of value:

- Receipt of payment
- Purchase Agreement
- Land title
- Employment contract
- Non-disclosure
- Record of employment

7. Feedback/Review - A process of disseminating and collaborating on information, observations or opinions:

- Policy and procedure development
- Status report
- Trip report
- Clinical study
- Technical note
- Meeting minutes

A topology for form-driven business processes:

Monitor						
· Monitor key performance indicators · Monitor work load allocation			· Instance-based monitoring (self-query)			

Manage	
· Balance work-load	· Manage process instance priority (expedite)

Select Document	Fill	Initiate	Alert	Select Task	Work	Proceed
· Select template form	· Fill template form · Populate from external data source · Data validation · Suspend/ Resume	· Initiate business process · Copy form data into process · Persist form	· User is alerted to pending task	· Select human task for work	· Display form · Copy data from process · Modify form ·Approve/ Reject ·Suspend/ Resume	· Complete human task · Copy form data into process · Persist form · Select next step

Store	
· Store form templates · Store form instances	· Index form data · Create/Update/Delete/Search

Report
· Report on data in aggregate

Implementing the BPA topology:

Monitor

WebSphere Dashboard Framework	*Process Status Portlet* **5**	*WebSphere Business Monitor*

Manage

Business Process Choreographer

Select Document	Fill	Initiate	Alert	Select Task	Work	Proceed
Form List Portlet **1** · Lists forms in repository · Property Broker Enabled	*Form View Portlet* **2** · Displays form in WPS · Property Broker Enabled *Lotus Forms Webform Server*		*Alert Portlet/ Messaging* · WebSphere Dashboard Framework asset · Based on Portlet Builder	*Task View Portlet* · Displays task list from Process Server · Based on Portlet Builder Task View	*Form View Portlet* **2** · Displays form in WPS · Property Broker Enabled *Lotus Forms Webform Server*	

Store

Forms Document Repository **3**	*Forms Repository Manager (C.R.U.D.S)* **4**

Report

Cognos BI	*WebSphere Dashboard Framework*

■ **Existing Asset**   ■ **New "Framework" Asset**

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BPM projects are a top priority for Portal customers

1. Form List Portlet
- Lists forms from a configured sub-section of the Forms Repository
- Forms are associated with a retrieval URL
- Property Broker is used to communicate form selections

2. Form View Portlet
- Displays forms using Lotus Webform Server and or Viewer
- Is passed a form URL or a Process Server Human Task
  - Manages task completion and business object synchronization

3. Form Document Repository
- Provides storage for form templates, running form instances and completed forms
- Stores forms and metadata in simple filesystem store or DB2 (PureXML)
- Accessed using a simple, high-level Java API

4. Forms Repository Manager
- Allows simple management function on the Form Document Repository
- Allows templates and forms to be added, extracted and deleted
- Simple portlet interface

5. Process Status Portlet
- Provides user to monitor status of initiated processes

The reusable components that comprise the BPA Framework will be made available to our customers to help them accelerate their own BPM projects.

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Government to Employee (G2E) Services

Budget Estimation and Allocation Workflow

Initiator submits the budget and revised estimates in the prescribed Performa.

The reviewer will review and forward it to the approver

The approver approves the BE request

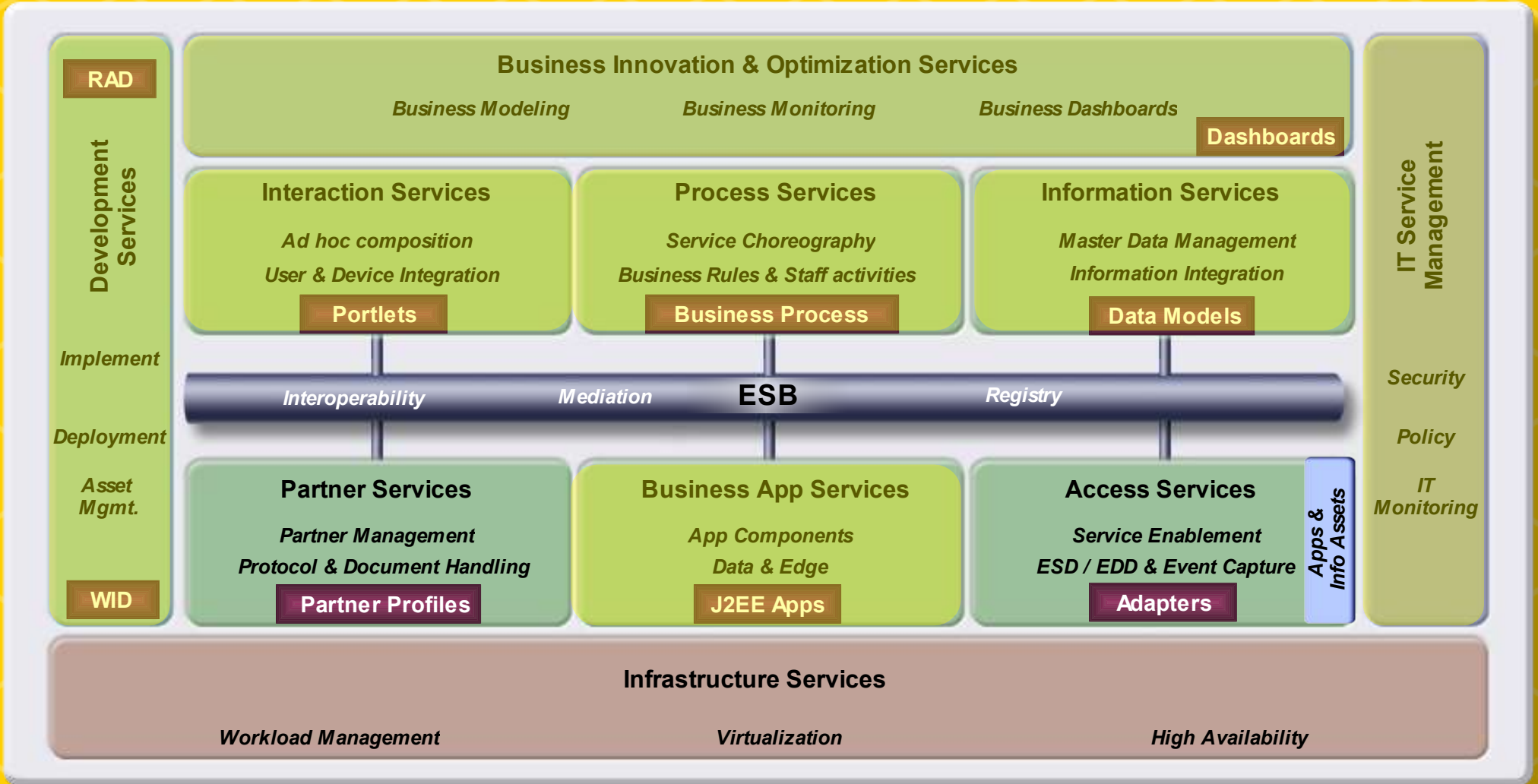Finance department clicks to automatically generates the Detailed Demands for Grants.

The Detailed Demands for Grants is forwarded for Secretary's approval.

On secretary's rejection, the Detailed Demands for Grants is reverted back to the concerned approver to take correction action and the BE request is raised again in the workflow.

On receiving the budget approval, the budget is finally allocated and utilization is tracked through dashboards

Mapping to SOA Reference Architecture

WebSphere software — Integration Developer / Portal Server / Process Server

Lotus software — Domino / Workplace Forms / Workplace Dashboards

Information Management software — DB2

Development Services
- RAD
- Implement
- Deployment
- Asset Mgmt.
- WID

Business Innovation & Optimization Services
- Business Modeling
- Business Monitoring
- Business Dashboards
- **Dashboards**

Interaction Services
- Ad hoc composition
- User & Device Integration
- **Portlets**

Process Services
- Service Choreography
- Business Rules & Staff activities
- **Business Process**

Information Services
- Master Data Management
- Information Integration
- **Data Models**

ESB
- Interoperability
- Mediation
- Registry

Partner Services
- Partner Management
- Protocol & Document Handling
- **Partner Profiles**

Business App Services
- App Components
- Data & Edge
- **J2EE Apps**

Access Services
- Service Enablement
- ESD / EDD & Event Capture
- **Adapters**

Apps & Info Assets

IT Service Management
- Security
- Policy
- IT Monitoring

Infrastructure Services
- Workload Management
- Virtualization
- High Availability

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Technology Used - Workplace Forms

➕

TECHNOLOGY ADVANTAGES
BENEFITS OF WORKPLACE FORMS
TDAWS ADVANTAGE


Workplace Forms

- Integrating seamlessly with a variety of IBM products

› Enables easy-to-use, open standards-based electronic forms (eForms) that help reduce inefficiencies inherent to paper-based forms.

› IBM Workplace Forms have been implemented for more than 200 Enterprise customers over 10 years.

› Data bindings to on-premise and database-based applications

› Rapid application development platform based on the open source Eclipse framework

› Populate e-forms through web services

› Supports signed workflows at the field, section, page or document level

› Help improve productivity and lower costs by enabling developers to share assets

› Digitally signed documents

› Supports offline sophisticated role-based workflows

› Consolidate application maintenance efforts

› Supports BPEL standard

› Store all elements of a process in one secure file

› Write less low-level code

› API works with all workflow systems

› When you decide to deploy a full complement of electronic forms

› Route documents automatically, using a routing form model with code for common functions

› Signs data and presentation of form

› Smaller file sizes than competing technologies

› Open standards makes it easier for forms to connect with the various touch points of a business process

› Accommodate with the various touch points of table, high-value, enforceable records

› Not web exclusive support

› Open standards support – Java, Eclipse, JSR standards

› Fast, Scalable, Lightweight, component interfaces

› Increase usability through guided wizard process

› Create customizable user interfaces

› Multiple schemas within a single form support complex integration into multiple backend systems

Supports Business Process Automation

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TECHNOLOGY ADVANTAGE / Business Advantage / Product Benefits

WebSphere software Process Server
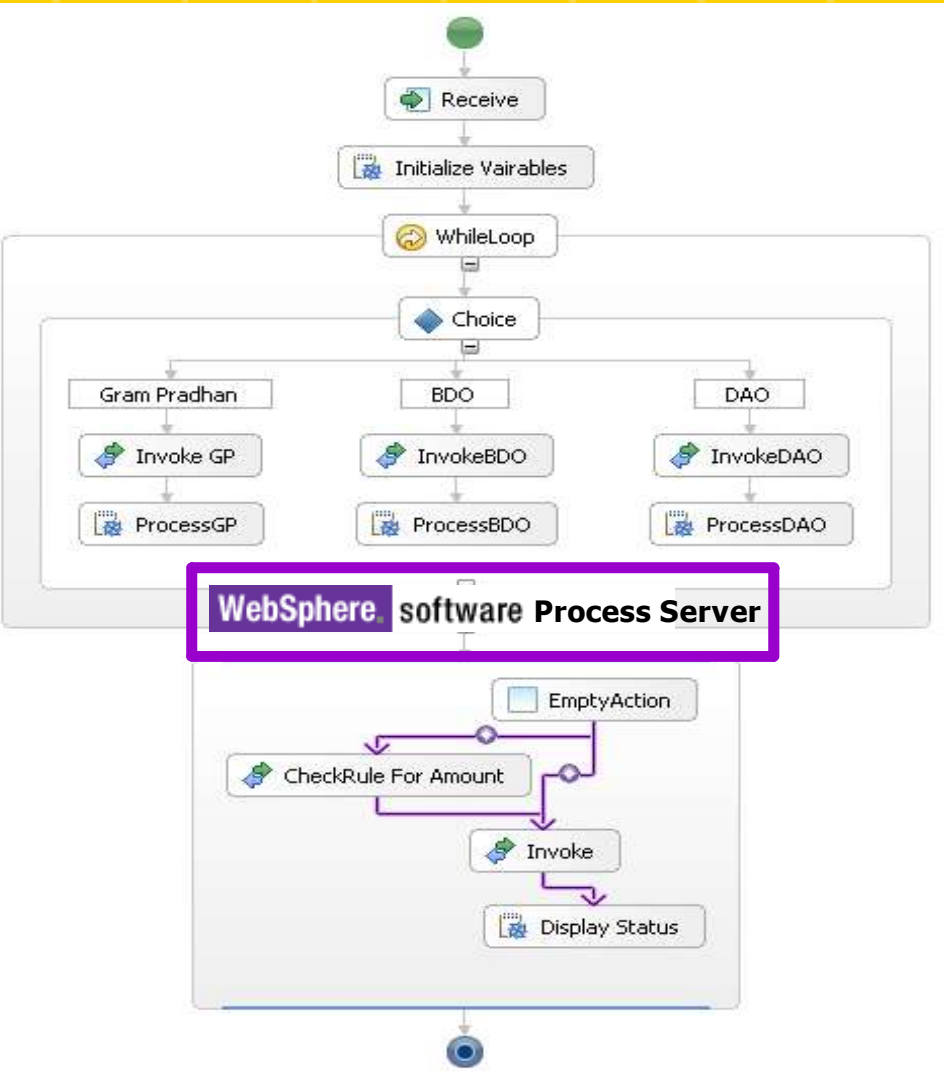
- One programming model based on service-oriented architecture (SOA)
- Allows easy-to-use comprehensive human-centric business processes
  - Easy to use and customer deployment environment business
  - Supports rich-client (RCP) and browser-based business process client for administrators
- Standards-based connectivity to leverage existing application your composite service configuration
  - Provides customizable and extensible configuration client for administrators
- Allows customized web-step design for common task recommendations
  - Supports composed web step to integrate for workflow client applications on any platform, including .NET and Java 2
- Native application support (J2EE) for easy to deploy and manage
  - Enterprise logic simple to develop, deploy and manage
- Increased responsiveness flexibility with support for human tasks and drill down administration
  - Provides graphical view to suppress step break stacks and drill down into each individual activity
- High-availability and fault-tolerant runtime
  - Provides runtime delivery of messaging improvements including JMS capabilities for preview of Tiered Scalable TP (telephony) integration
- Efficient integration ability with business event handling dynamic capabilities for historical and accumulated data
  - Easily integrate with your existing WebSphere family runtime
- Compatible with all enterprise non-IBM products, through IBM, adhering to open standards, which interconnection model them
  - Visually discover processes that produce the system, compile business needs, and the interactions among heavily event-driven business-process scenarios
- Services can be reused and combined to deploy composite applications
  - Provides reused and combined for deploy for loosely coupled business
  - Wizards quickly and simply expose IBM CICS® or IBM IMS™ programs as enterprise services
  - High-availability and fault-tolerant runtime

Technology Used – Lotus Collaboration Suite

Instant Messaging and Web Conferencing

IBM Lotus Sametime

Converse online real-time with one or several people using instant messaging.

IBM Lotus Web Conferencing

Extend the benefits of Web Conferencing across your organization

IBM Workplace Team Collaboration

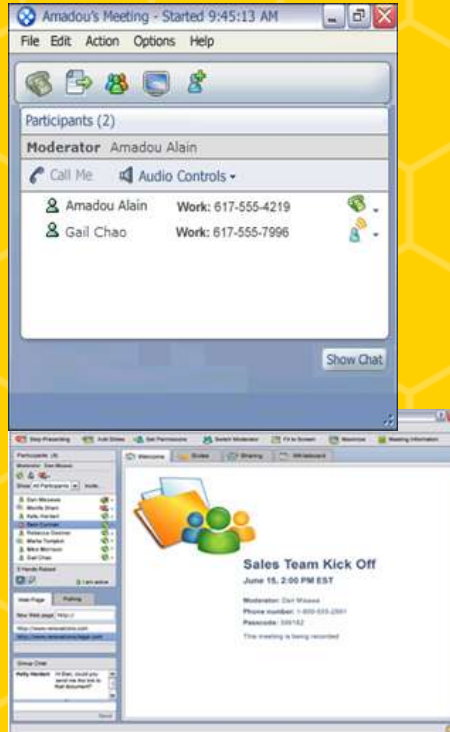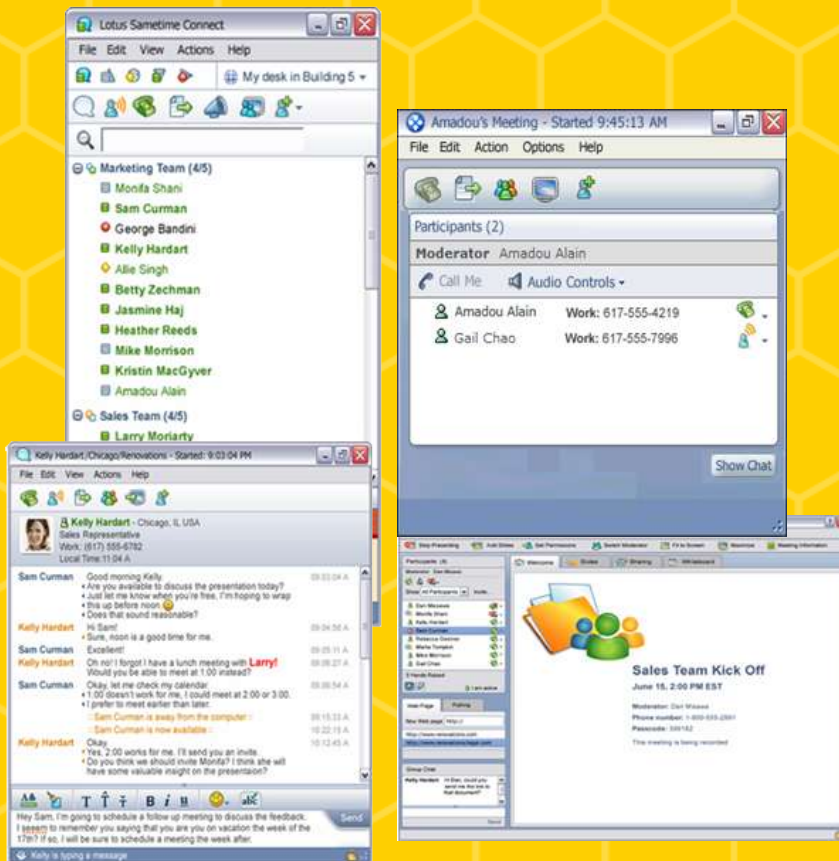customizable team spaces for the IBM Workplace environment.

E-mail, Calendaring and Collaborative Applications

IBM Lotus Domino

Provides a world-class server platform for e-mail and scheduling, business applications or both.

IBM Lotus Notes

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Conclusion

Improve operational efficiency by integrating cross functional business processes

- Both Portal and Forms enable new integration paradigms that make it easier to create business processes that span multiple applications and architectures

Facilitate innovation, flexibility and continuous process improvement

- Portal and Forms enable ad-hoc processes that span the enterprise - and beyond.

Reduce infrastructure TCO

- Using Portal and Forms, the user interface and application components become reusable, standards-based assets than can quickly be leveraged throughout the enterprise

A use-case driven framework is being produced to enable the automation of business processes using Forms, Portal and Process Server.

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Additional Information and Resources

WebSphere Portal – IBM Site

http://www-3.ibm.com/software/genservers/portal/

WebSphere Portal Business Solutions Catalog:

http://catalog.lotus.com/wps/portal/portal

Websphere Portal Developer's Zone

http://www-106.ibm.com/developerworks/websphere/zones/portal/

Product Documentation and WebSphere Portal Wiki

http://www-3.ibm.com/software/genservers/portal/library/

http://www-10.lotus.com/ldd/portalwiki.nsf

Education

http://www-3.ibm.com/software/genservers/portal/education/

WebSphere Portal 6.0 DemoNet

http://docs.dfw.ibm.com/wp6/?DDSPageRequest=/

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