

High Productivity Solutions to Help Business Teams Manage Processes and Rules



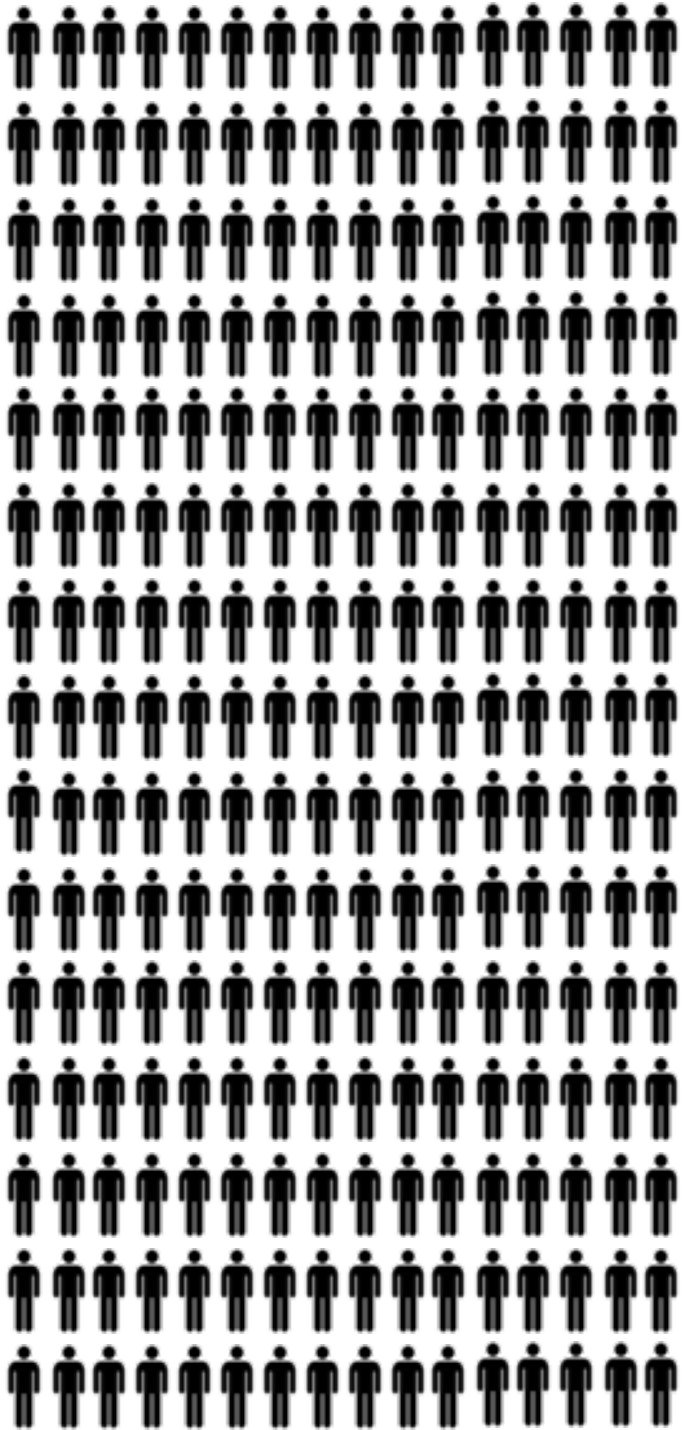
Phil Gilbert
Vice President, IBM Software Group
Business Process & Decision Management

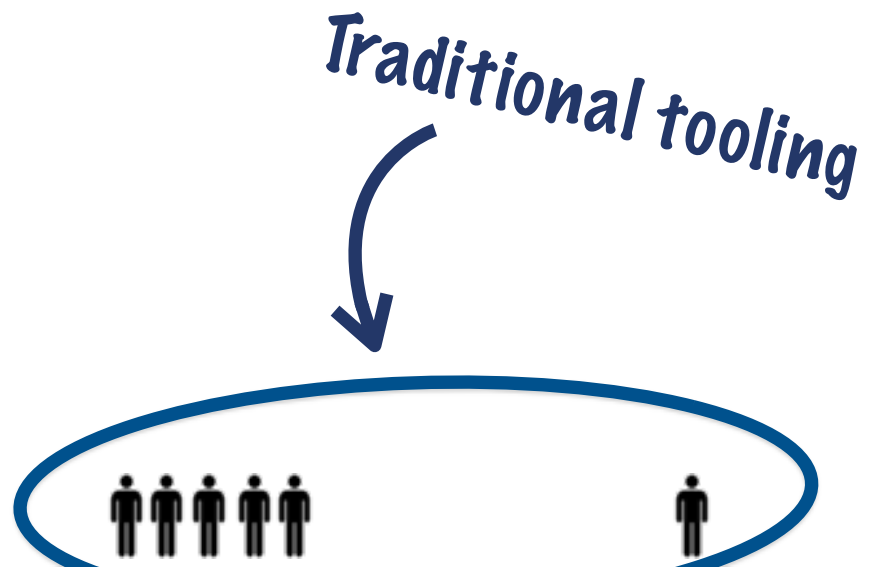
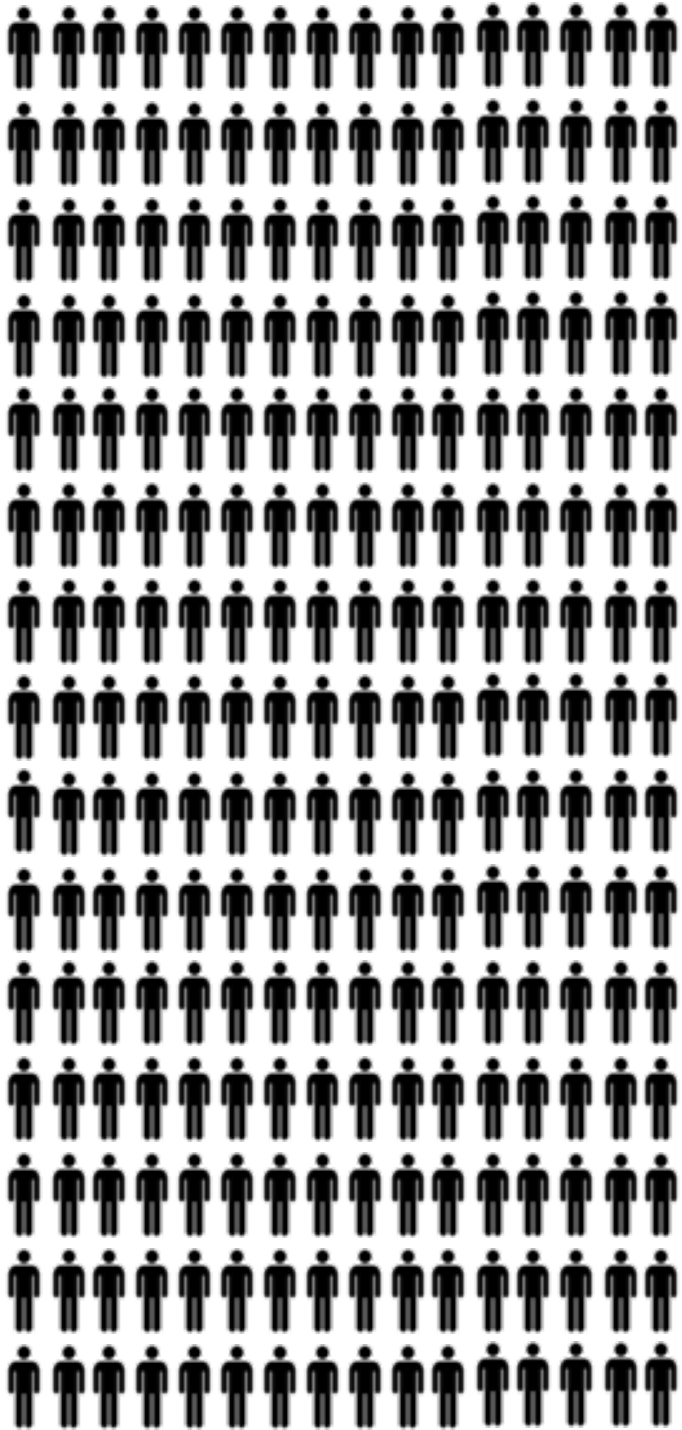
5 April, 2011



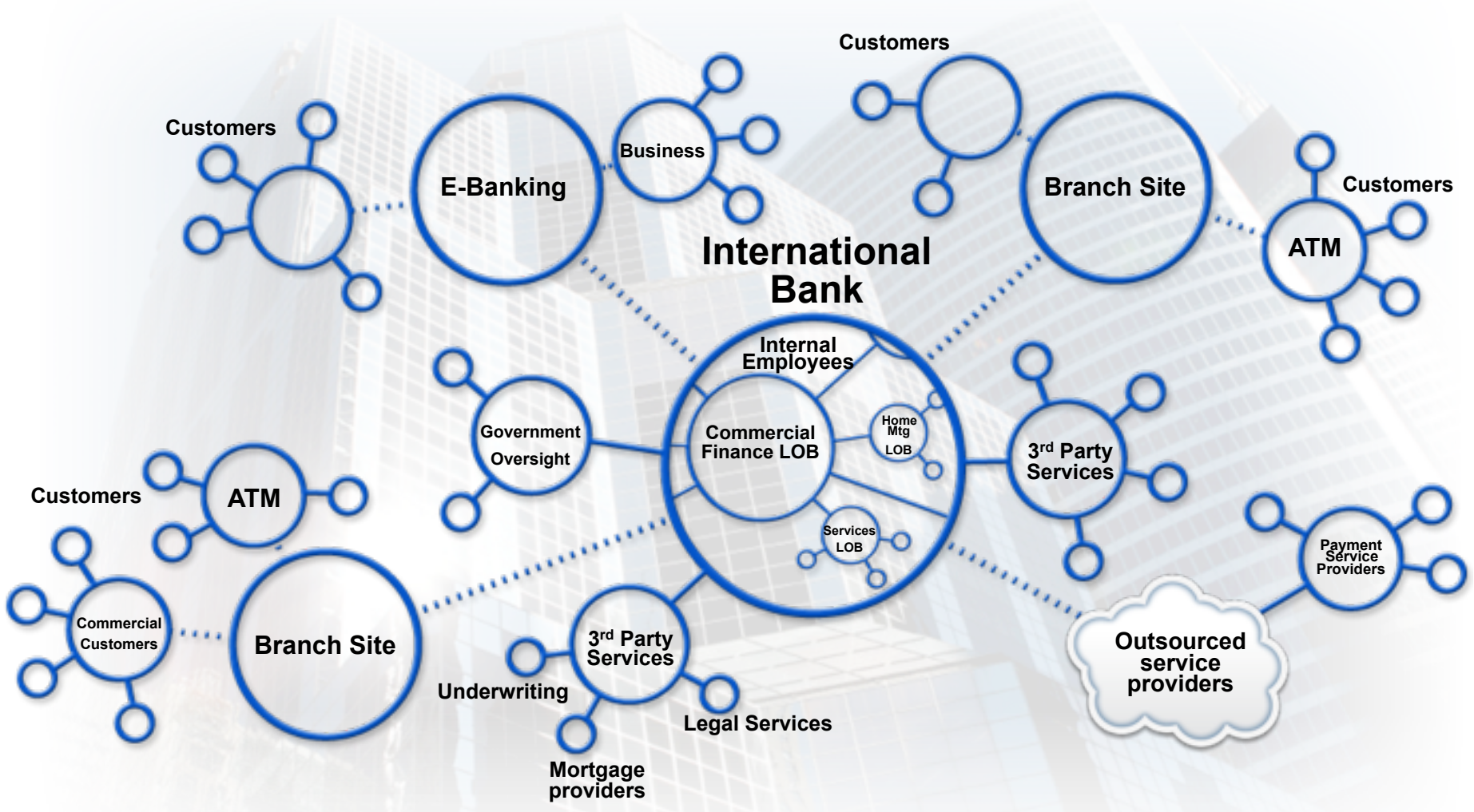
**IBM System z Software
Premier Executive Briefing Event**

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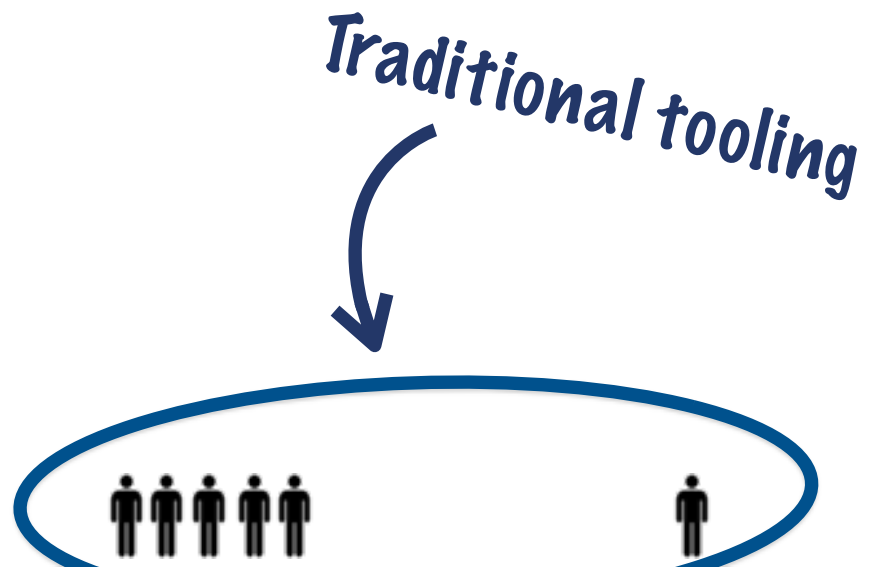
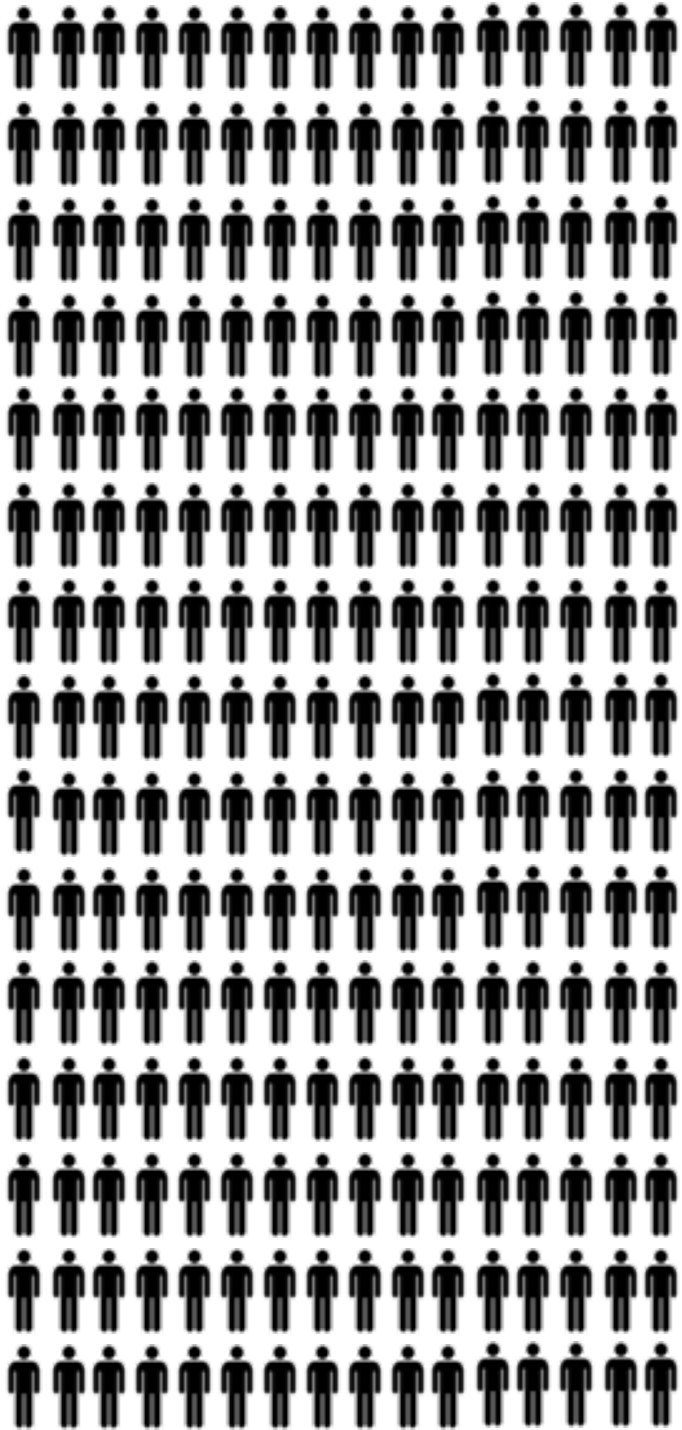
The Modern Enterprise is a Network of Complex Interactions...

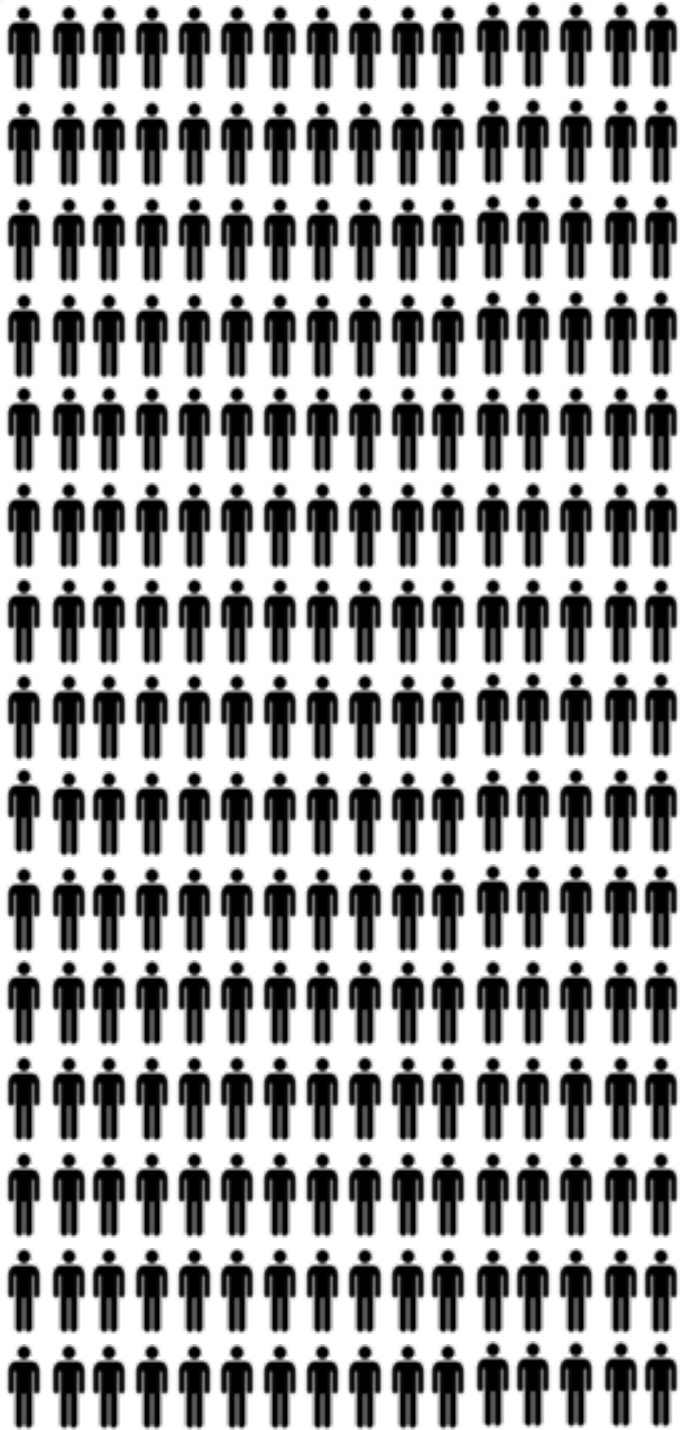


Organizations Strive to Optimize Processes Across Broad Business Networks

... Powered By Mainframe Assets

- **70% of corporate data**
 - **75% of the business logic that corporations run on today**
 - **30 billion transactions/day ⁽³⁾ valued at over \$1 trillion/week ⁽³⁾**
 - **213M messages per day on z/OS in the banking industry alone**
 - **\$5 Trillion of core System z applications with estimated replacement costs of \$20 Trillion ⁽³⁾**

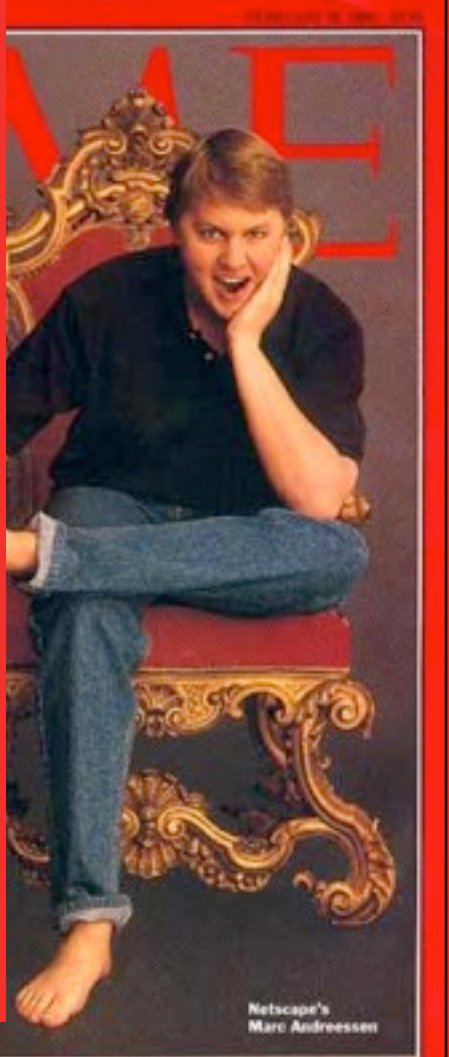




BPM: Reaching a new user



...IS A
...PROBLEM,
...A
...CAL ONE





LIBRARY

- Music
- Movies
- TV Shows
- Podcasts 2
- Books
- Apps 3
- Ringtones
- Radio

STORE

- iTunes Store
- Purchased

DEVICES

- Breakfast Apple TV
- Library Apple TV

SHARED

- Phil Gilbert's Air Library

GENIUS

- Genius

PLAYLISTS

- iTunes DJ
- 160GB iPod
 - Dylan
 - Desert Island

IM (MAIN)

- All
- Processes
- User Interface
- Implementation
- Rules
- Data
- Performance
- Setup
- Assets

BLUEPRINTS

TOOLKITS

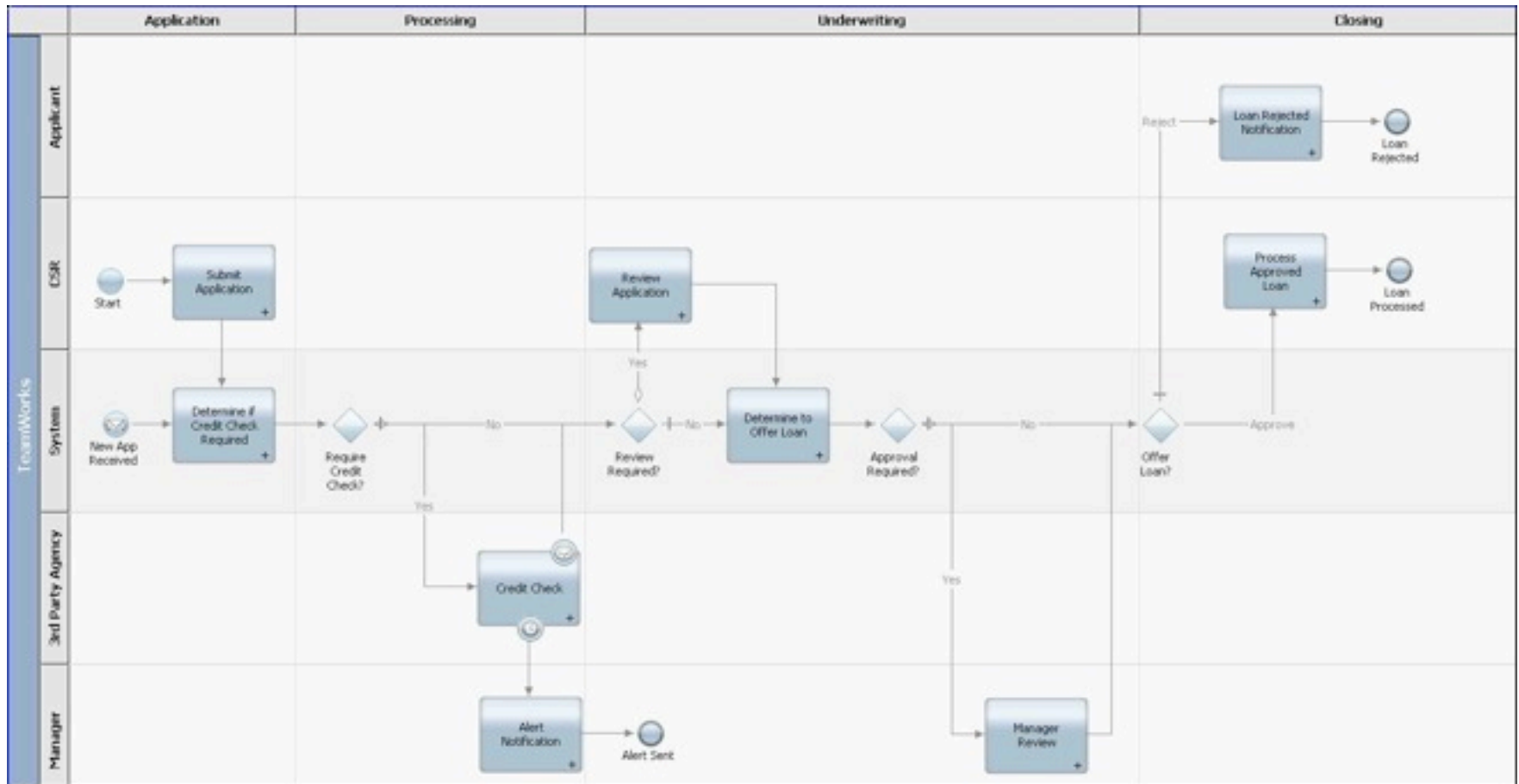
- CRM Integration (v3)
- Common Subprocesses (v1)
- System Data (7.0.0 Beta1)
- Document Management (v1) ⚠

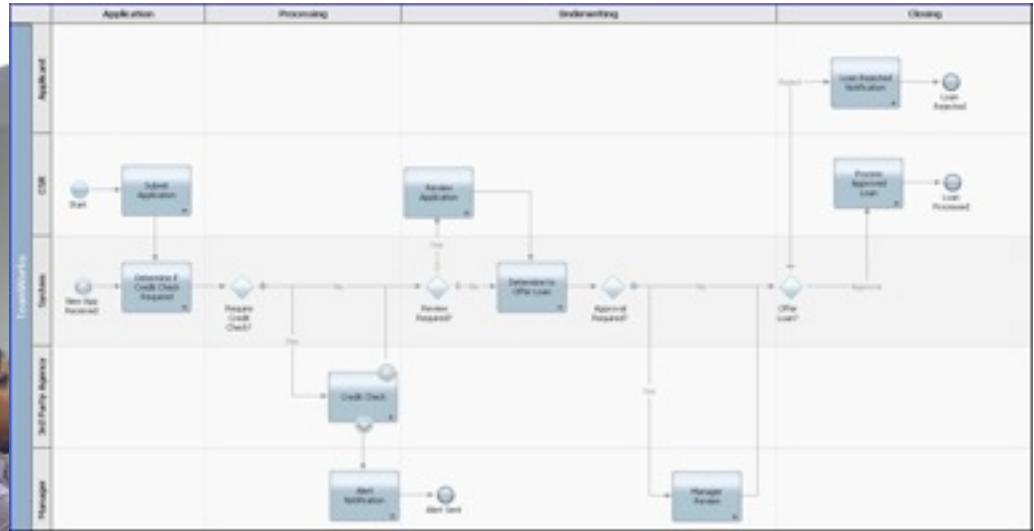
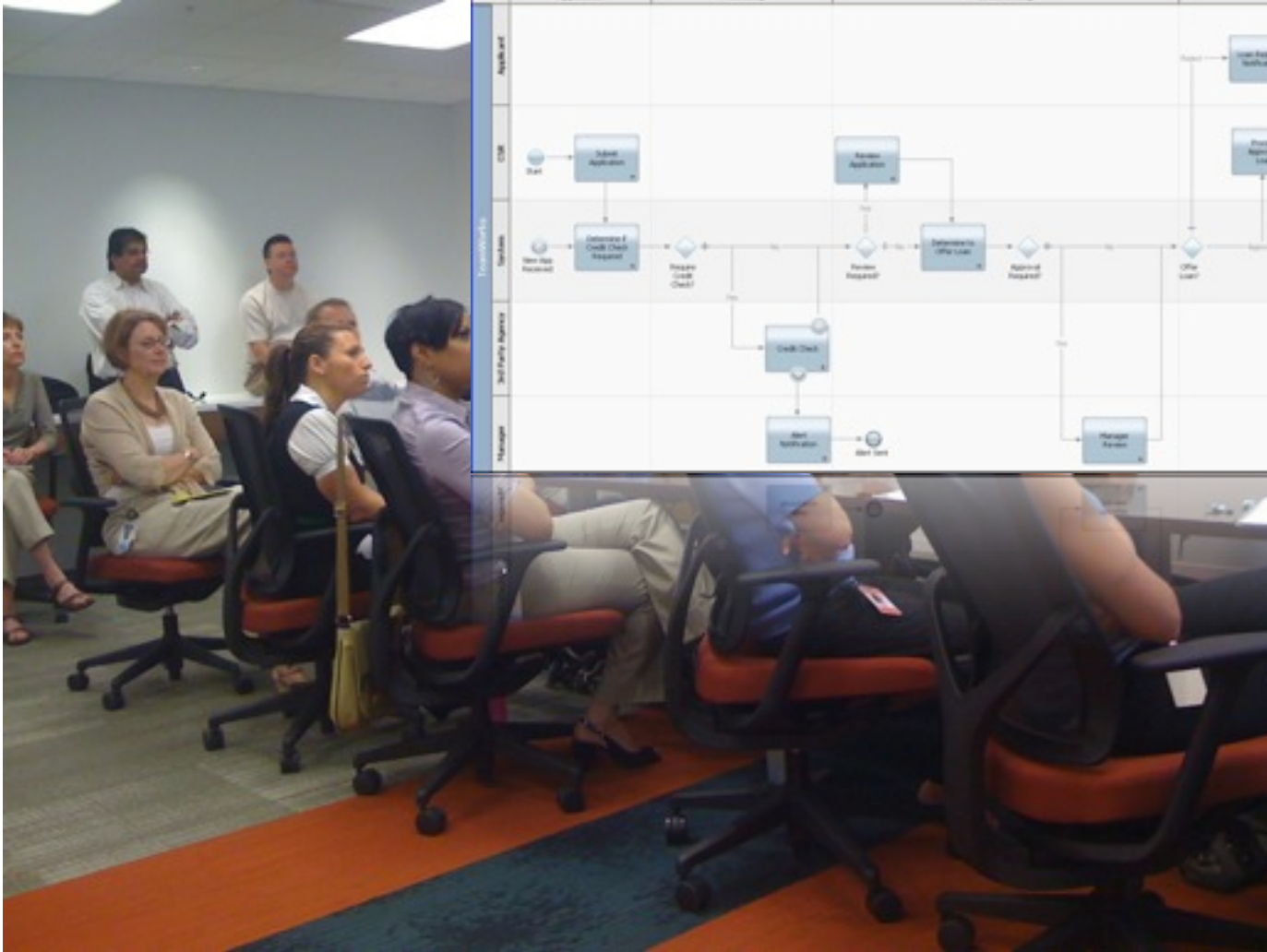
SMART FOLDERS

- ★ Favorites
- 📅 Changed today
- 📅 Changed this week
- ⚠ Validation errors
- 📁 Ready for System Test

Track #	Disc #	Kind	Genre	Rating
1 of 10	1 of 1	Apple Lossless...	Jazz	
2 of 10	1 of 1	Apple Lossless...	Jazz	
3 of 10	1 of 1	Apple Lossless...	Jazz	
4 of 10	1 of 1	Apple Lossless...	Jazz	
5 of 10	1 of 1	Apple Lossless...	Jazz	
6 of 10	1 of 1	Apple Lossless...	Jazz	
7 of 10	1 of 1	Apple Lossless...	Jazz	
8 of 10	1 of 1	Apple Lossless...	Jazz	
9 of 10	1 of 1	Apple Lossless...	Jazz	

The picture is only the beginning...





User interfaces are reviewed...

Ref. A000111 - Taxa Fixa

Nome: **Georgina Lopes Vale** Segmento Declarativo: **360 Fidelizados** Moeda: **EUR**

Regime	Finalidade	Montante	Prazo	Adiantamento	Utilização	Prestação	Tx/Index. %	Spread %	TAN %
<input type="radio"/> ACT	Aquisição	176.00,000	360 meses	-	-	701,84	2,57	-	2,57
<input type="radio"/> Geral	Aquisição	74.00,000	360 meses	5.000,00	-	424,26	5,088	0,5	5,088
<input type="radio"/> Geral	Obras	26.00,000	360 meses	-	18 meses	152,13	4,965	0,5	4,965
<input checked="" type="radio"/>	Total	276.000,000		5.000,00		1.278,23			

Prestação Mensal - Total 1.278,23

Avaliação Habitação 290.000,00

Seguro de Vida (Prémio Mensal) 2 pessoas 100%

Seguro Imóvel (Prémio Anual) 201,73

Prestação Mensal com Subida de 1% na Taxa Nominal 1280,02

Prestação Mensal com Subida de 2% na Taxa Nominal 1290,89

Estimativa de Despesas Previstas - Escritura Pública		Estimativa de Despesas Previstas - Casa Pronta	
Comissão de Avaliação	168,30€	Comissão de Avaliação	168,30€
Comissão de Abertura de Processo	250,00€	Comissão de Abertura de Processo	250,00€
Serviço de Documentação	0,00€	Serviço de Documentação	0,00€

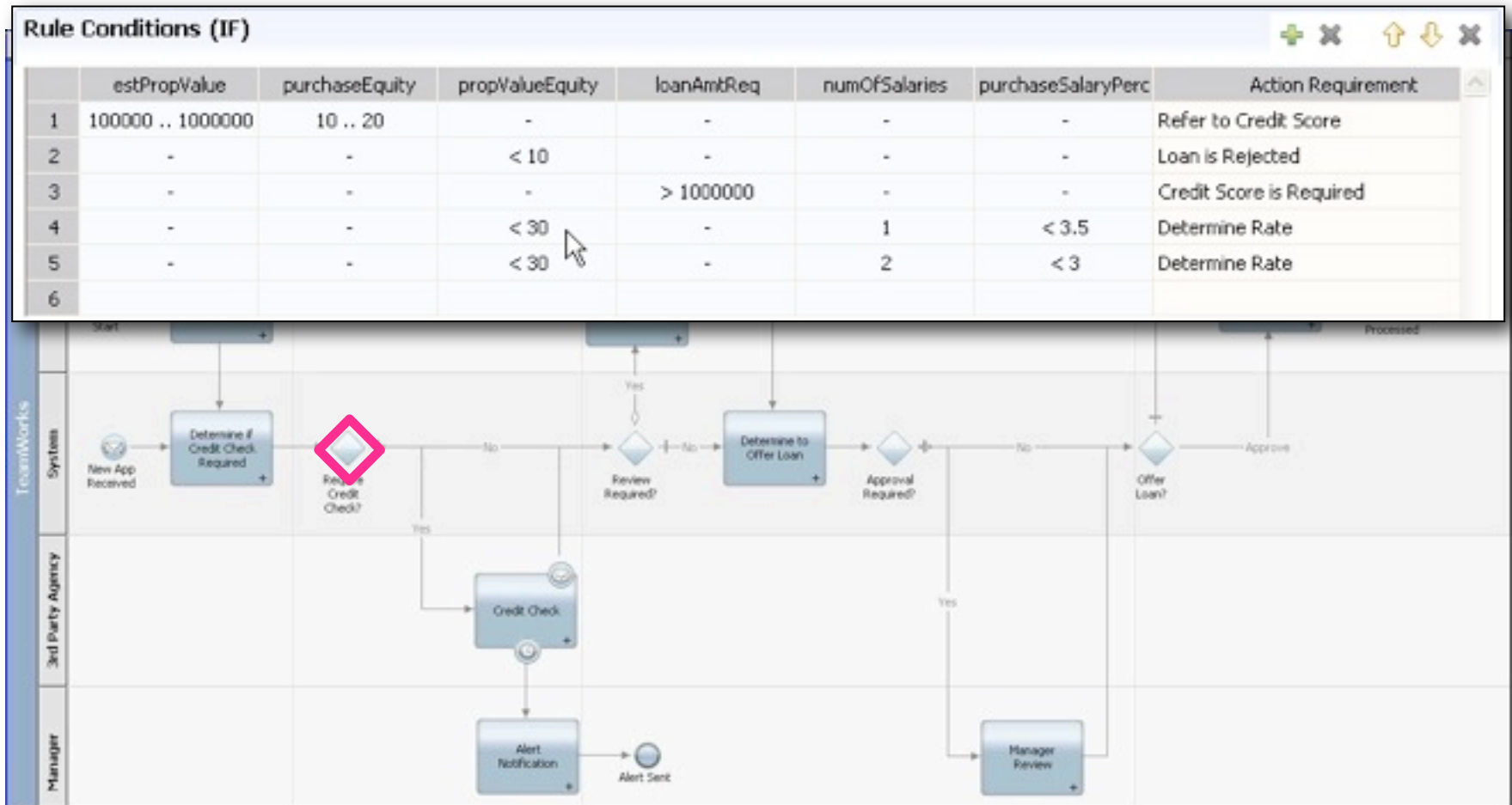
Imprimir < Anterior Seguinte > Gravar Criar Proposta Sair

1 Caracterização Cliente 2 Empréstimos 3 Bonificações 4 Simulação 5 Resultado Simulação

Validado Novo Empréstimo Bonificação 0,01% Taxa Fixa

“Right Information to the Right People at the Right Time”

Process rules are discussed and defined...



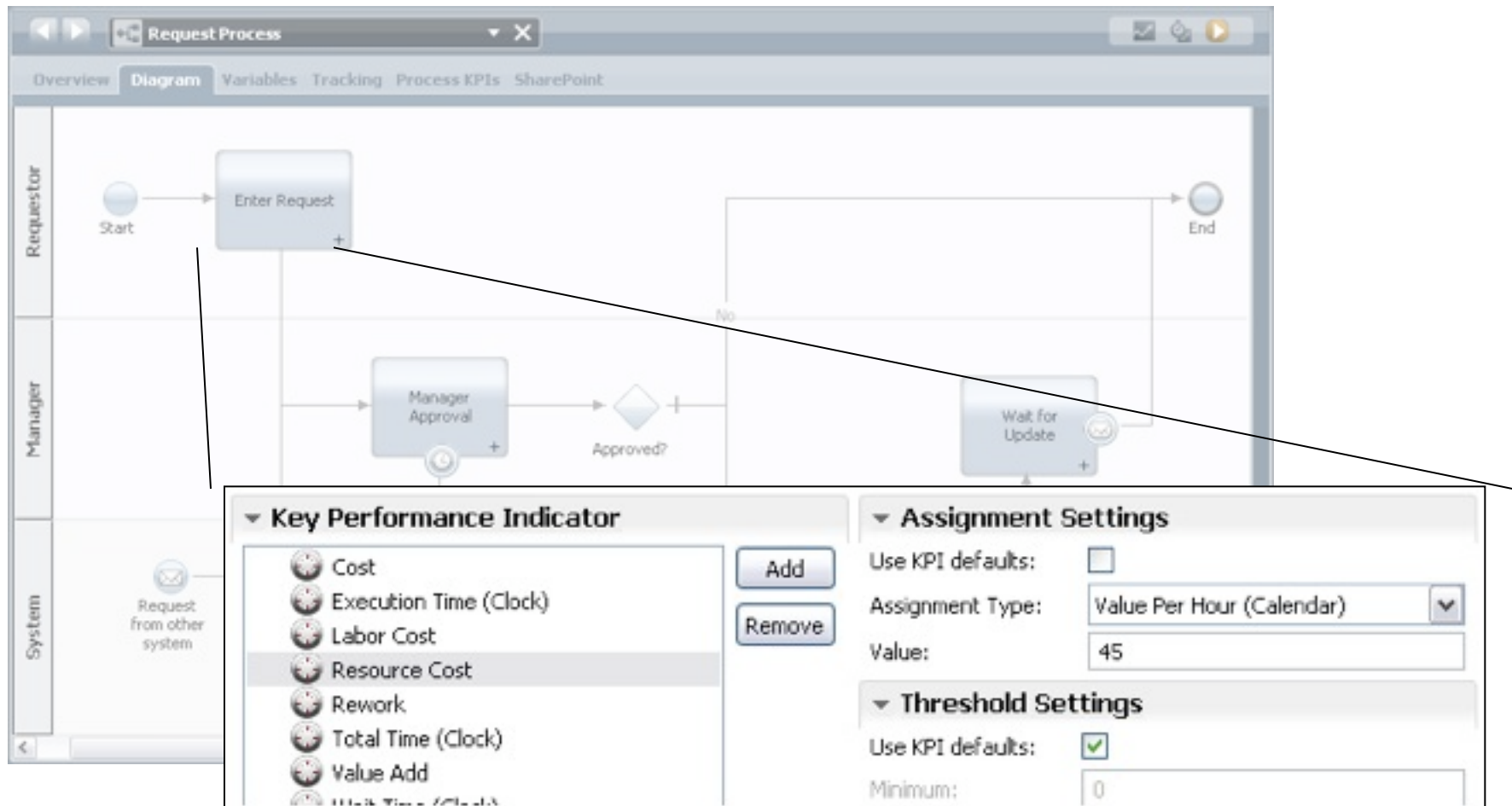
“Enforces that rules of the business are followed”

Integrating Rules from ILOG BRMS into Lombardi BPM

The screenshot displays the Lombardi BPM Designer interface. The main workspace shows a workflow diagram with a 'Start' event, a 'JRules Credit Check Rule' task, and an 'End' event. The 'JRules Credit Check Rule' task is highlighted with a red box. A red arrow points from this task to the 'Properties' panel at the bottom. In the 'Properties' panel, the 'Discovery' section is expanded, showing fields for 'Server', 'SOAP Port', 'Username', and 'Password'. The 'Rule' section is also expanded, showing 'Rule App' and 'Ruleset' fields. A red dashed arrow points from the 'JRules Decision Service' icon in the right-hand palette to the 'JRules Credit Check Rule' task. The 'JRules Decision Service' icon is also circled in red.

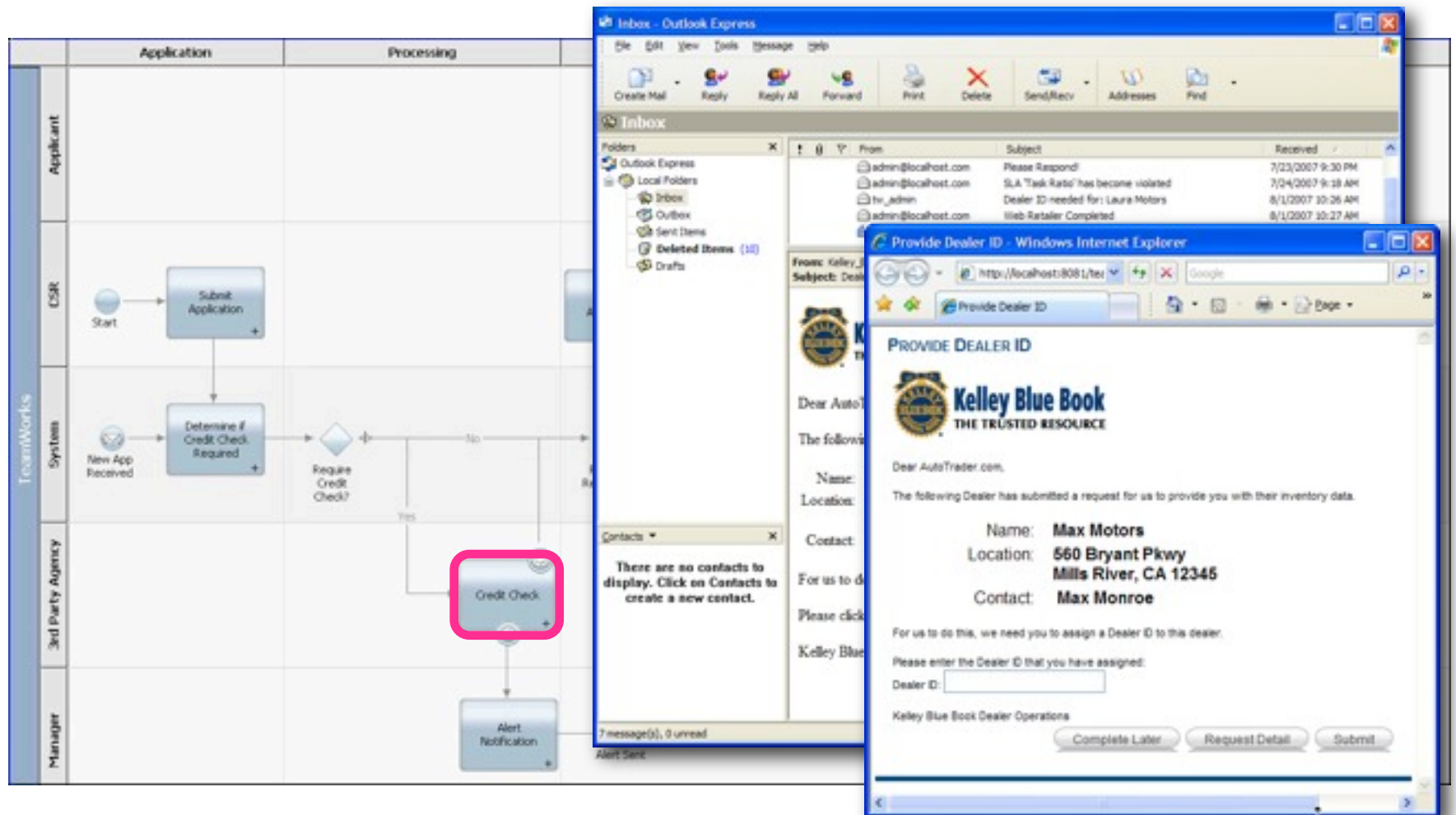
Authors are able to browse and select an existing Ruleset from an existing JRules Execution Server

KPIs and SLAs are debated and defined...



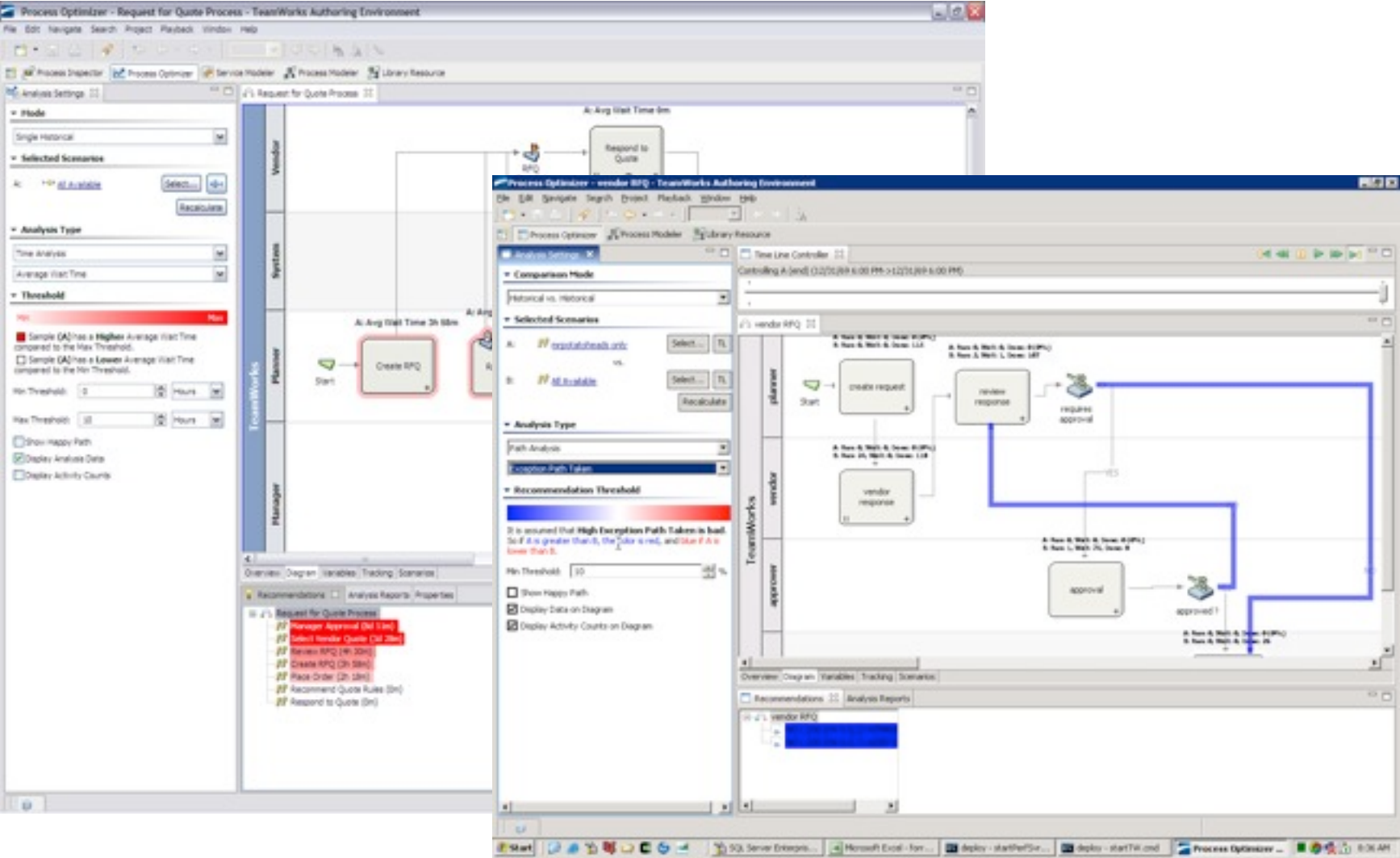
“focus on process metrics”

We can move data directly to 3rd parties...



“Incorporate 3rd parties into the process”

and review simulations and exception paths...



See how users will actually retrieve their work...

The screenshot displays the Teamworks Process Portal interface. On the left, a vertical navigation bar lists roles: Applicant, CSR, Systems, 3rd Party Agency, and Manager. The main content area is titled 'PM My Team Performance' and includes a 'Task Status' pie chart, a 'When will Tasks go Overdue' bar chart, and a 'Task List for all and All Processes' table.

Task Status Pie Chart Data:

Status	Percentage
On Track	58.18%
At Risk	22.73%
Overdue	58.09%

When will Tasks go Overdue Bar Chart Data:

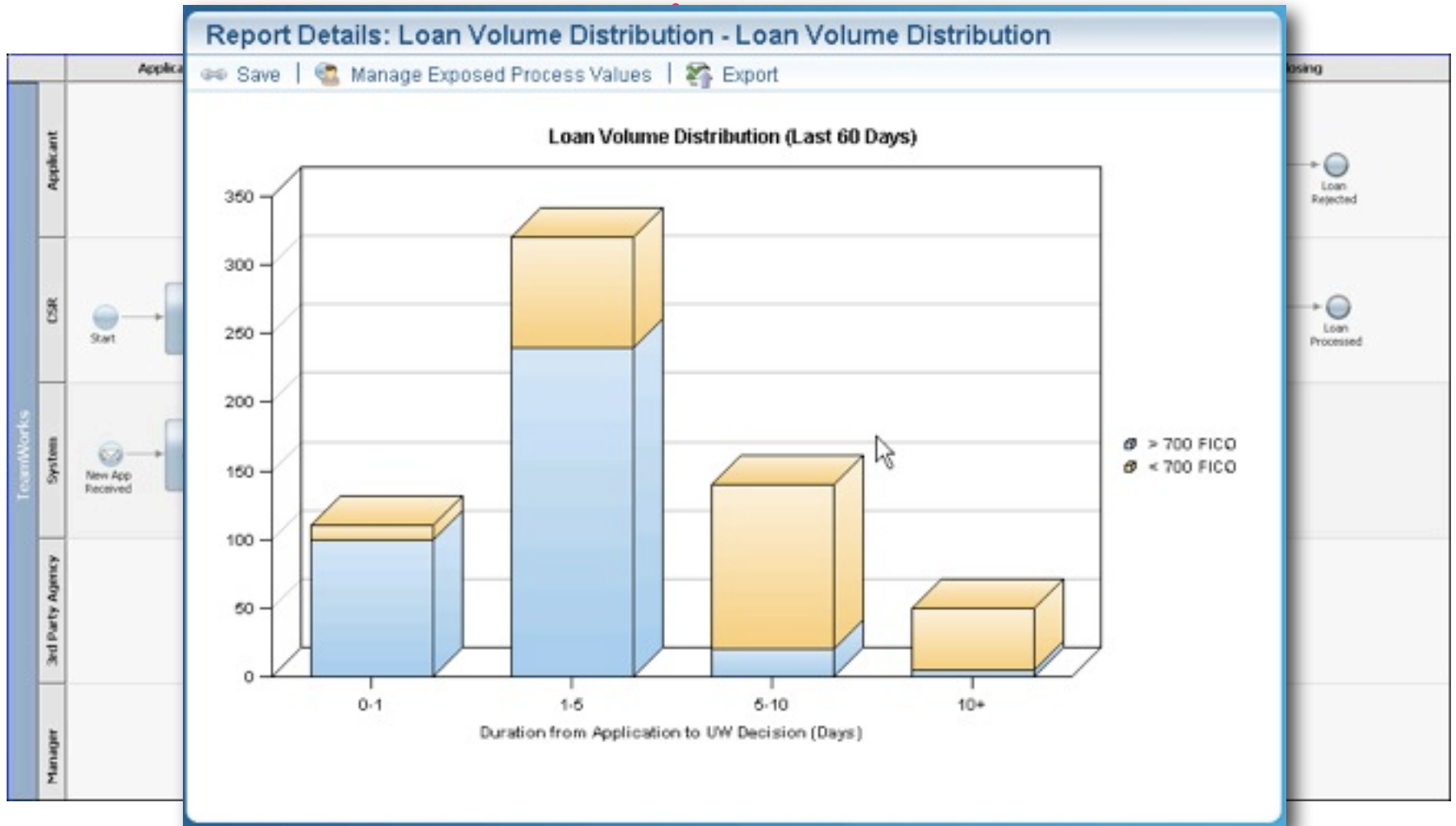
Year	Adm Label
06	2
07	2
08	3

Task List for all and All Processes Table:

Status	ID	Subject	Due Date	Priority	Current User	Team
Overdue	638	Step: Approve Request	06/02/2007	Normal		Operations Manager
Overdue	639	Step: Approve Request	06/02/2007	Normal		Operations Manager
Overdue	640	Step: Approve Request	06/01/2007	Normal		Operations Manager
Overdue	641	Step: Approve Request	06/02/2007	Normal		Operations Manager
Overdue	642	Step: Approve Request	07/04/2007	Normal		Operations Manager
Overdue	643	Step: Approve Request	07/04/2007	Normal		Operations Manager
Overdue	644	Step: Approve Request	06/04/2007	Normal		Operations Manager
Overdue	645	Step: Approve Request	06/03/2007	Normal		Operations Manager
Overdue	646	Step: Approve Request	06/03/2007	Normal		Operations Manager
Overdue	647	Step: Approve Request	06/03/2007	Normal		Operations Manager
Overdue	1078	Confirm Launch Date	06/05/2007	Normal	ServiceMgr	Service Manager
Overdue	1081	Confirm Launch Date	06/05/2007	Normal		Service Manager
Overdue	1082	Confirm Launch Date	06/05/2007	Normal		Service Manager
At Risk	1075	Confirm Launch Date	06/06/2007	Normal		Service Manager
At Risk	1077	Confirm Launch Date	06/06/2007	Normal		Service Manager
At Risk	1107	Re-Work DP	06/06/2007	Normal	SalesUser1	
At Risk	1117	Re-Work DP	06/07/2007	Normal		

“Visibility into work in progress, and take action”

And make sure useful reporting is thought about up front...



“Using process data to improve your business”



IBM/Lombardi engages the business in understanding, improving and managing processes better than any alternative on the market. Putting the right capability **in the hands of every employee is the key** to becoming a process-driven company.



— Toby Redshaw, Global CIO, American Express

The Value of BPM and BRMS For System z

Leverage

- Mission-critical applications & processes
- Performance, robustness, & scalability
- Colocation
- Cost/ performance advantage

Modernize

- Business agility
- Streamlining business applications for efficiency
- Extending business applications for new opportunities
- Leveraging investment in System z and zEnterprise

Unify

- Improved IT/LOB alignment, collaboration, governance and lifecycle management
- Seamless deployment across distributed and zEnterprise platforms
- Process, rule & event assets sharing and reuse



System z for BPM & BRMS

Process Integrity

Reliable execution of distributed business activity

Reliability

For meeting SLA's

Co-Location & High Availability

Proximity of data, processes, rules & events on zOS

Dynamic Process & Rule Management

On-the-fly process & rule changes

Scalability & Performance

To billions of transactions/ day

Dependability & Interconnectedness

Through a robust enterprise infrastructure



Profit Per Employee

The #1 ROI of BPM

40%

BPM reduces rework by up to 35%

Business Process Management is about increasing the productivity of your people.

Dramatically.

5%

How Can You Modernize & Extend Core Business Applications for New Business Opportunities ?

A leading bank modernizes account opening to grow share of customer wallet

- *Incrementally modernized| 5 disparate COBOL applications by externalizing customer cross-sell/up-sell business rules.*
- *Improved management of business decisions, increasing revenue by \$15M in approved bookings in 10 weeks*
- *10 x improvement in cross-sell generation and client offer acceptance*

- Effective cross-sell/up-sell with instant updates of rules fully managed by business users
- Improved client relationship – acquisition, retention, and wallet-share
- Changes are implemented with greater accuracy and speed



How Can You Modernize & Streamline Core Processes?

A leading Korean insurance carrier modernizes insurance underwriting processes for greater efficiency

- *Improved compensation and underwriting processes with BPM, Business Activity Monitoring (BAM), and Business Rule Management (BRMS)*
 - *A single view of the customer and of the business*
 - *System z provided co-location of data and processes*
- Capture new markets with better understanding of potential customers
 - Improves risk management and lowers cost through inductive analysis of insurance risk in underwriting and fraud analysis
 - Improves productivity since customer service employees do not have to switch between applications



Profit Per Employee

The #1 ROI of BPM

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Dramatically.

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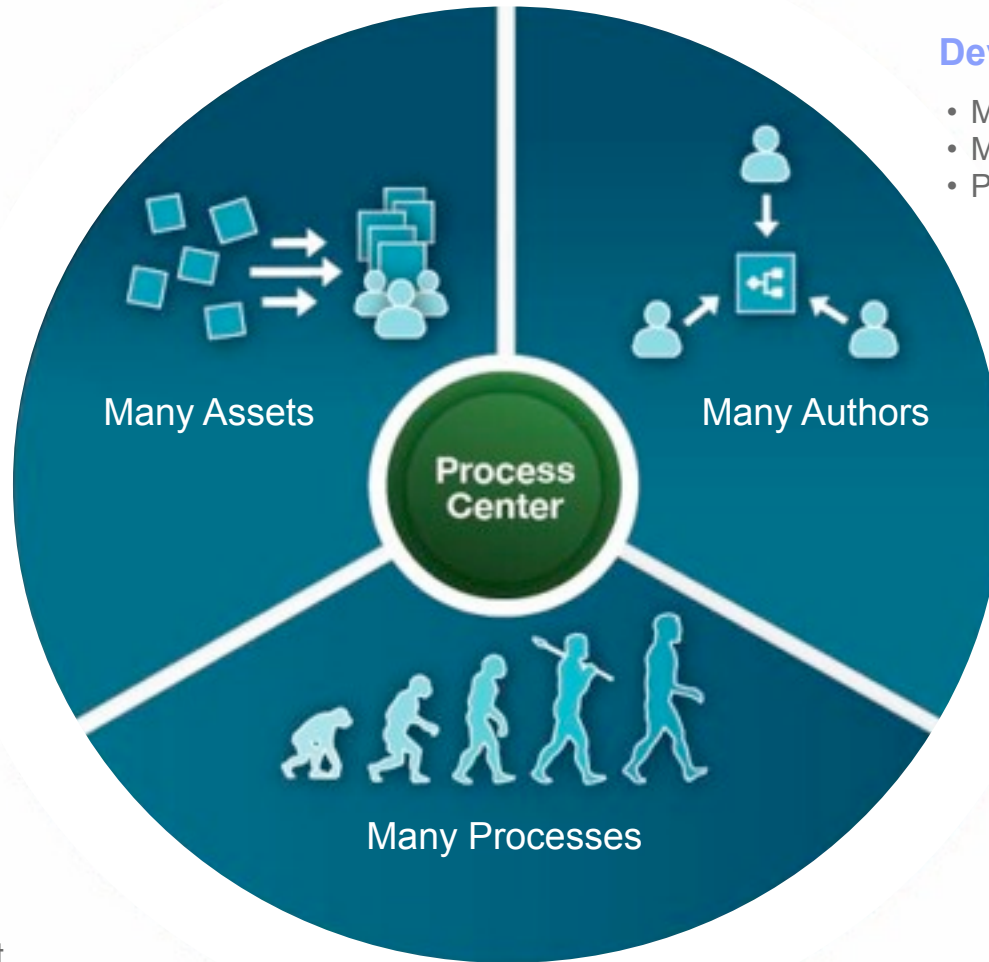
Obstacles to Scaling Up BPM Success ...

Managing Assets & Dependencies

- 1000's of application assets
- Growing disorganization
- Poor reuse

Developer Productivity

- Multiple dev teams
- Multiple dev systems
- Parallel development



Complexity of Process Lifecycle

- 100's -1000's of projects
- Multiple versions per project
- Dozens of servers in multiple environments

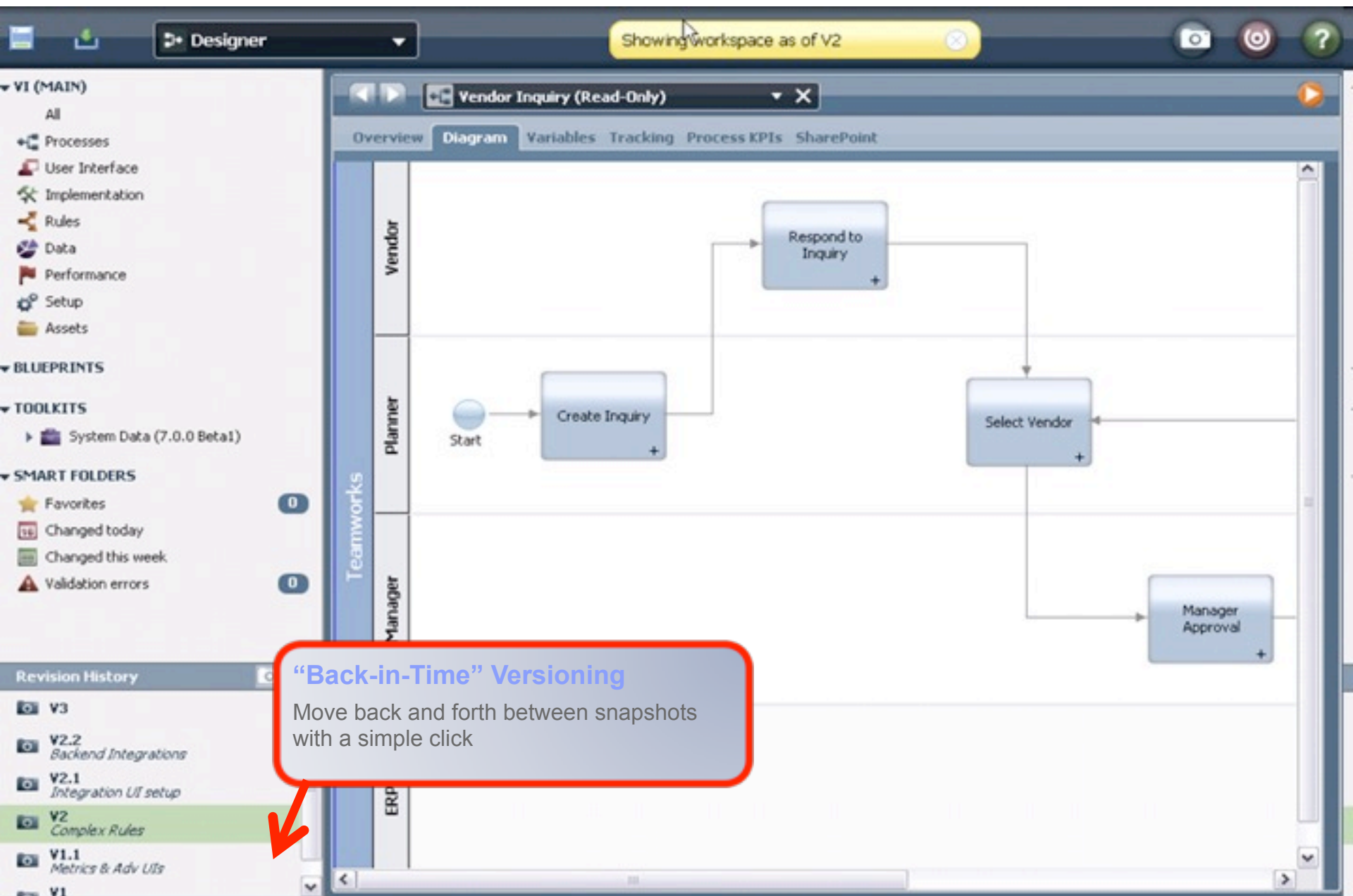
Smart Folders
Sort and organize 1000s of assets using predefined tags or user tags

Toolkits
Share related assets using Toolkits (maintain link to a specific version)

The screenshot displays the IBM Business Process Designer interface. The main window shows a process diagram for 'Vendor Inquiry' with steps: Request Sent, Respond to Inquiry, Responses Received, Recommend Vendor, and Select Vendor. A 'Create Inquiry' task is also visible. The left sidebar contains a navigation tree with categories like VI (MAIN), BLUEPRINTS, and SMART FOLDERS. A 'Revision History' panel at the bottom left shows a list of versions from V3 down to V1. A 'Currently Editing' and 'Currently Viewing' list is shown at the bottom right. Two red callout boxes with white text and blue titles are overlaid on the diagram. The first callout, titled 'Single-Click Snapshots', points to the 'Create Inquiry' task. The second callout, titled 'Concurrent Editing', points to the 'Currently Editing' list.

Single-Click Snapshots
 Create a new, named version with the simple click of a button

Concurrent Editing
 "Live" view of what assets other authors are editing right now



“Back-in-Time” Versioning
Move back and forth between snapshots with a simple click



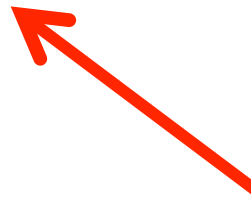


Sort By: Recently Updated | All | Favorites | Archived

- Issue Management (IM) ★
Last updated on 12/10/08 by LeslieJordan
Open in Designer
- Billing Disputes (BD) ☆
Last updated on 12/10/08 by LeslieJordan
Open in Designer
- Vendor Inquiry (VI) ★
Last updated on 12/10/08 by TimTebow
Open in Designer
- First Notice of Loss (FNL) ☆
Last updated on 12/10/08 by LeslieJordan
Open in Designer
- Modular Planning (MP) ☆
Last updated on 12/10/08 by SamBradford
Open in Designer
- Month End Close (MEC) ☆
Last updated on 12/10/08 by SamBradford
Open in Designer
- IT Change Management (ITCM) ☆
Last updated on 12/10/08 by TimTebow
Open in Designer
- Enterprise Learning (EL) ☆
Last updated on 12/10/08 by BrandonBaxter
- Process Driven BOM (PDB) ☆
Last updated on 12/10/08 by BrandonBaxter
- Advanced Sourcing (AS) ☆
Last updated on 12/10/08 by BrandonBaxter
- Employee Onboarding (EOB) ☆
Last updated on 12/10/08 by TimTebow
Open in Designer
- Process Portal (PORTAL) ☆
Last updated on 12/10/08 by tw_admin
Open in Designer

- + Create New Process App
- Import Process App

About Process Applications...
Process applications are containers in the Teamworks library for the process models and supporting implementations created in Teamworks Authoring Environment. Ordinarily, a process application includes process models, the services to handle implementation of activities and integration with other systems, and any other assets required to run the processes.



Process Applications
Separate workspaces for many different projects



Sort Snapshots By: All | Installed | Archived

V3
Created on 1/7/09 by BrandonBaxter
Currently Installed:
Test-NorthAmerica(twserver1) - 23 instances [Server Details](#) | [Uninstall](#)

V2.2
Created on 12/11/08 by BrandonBaxter
Currently Installed:
Test-NorthAmerica(twserver1) - 0 instances [Server Details](#) | [Uninstall](#)
QA-NorthAmerica(twserver2) - 11 instances [Server Details](#) | [Uninstall](#)
QA-EMEA(twemea2) - 54 instances [Server Details](#) | [Uninstall](#)
Prod-NorthAmerica(jordan) - 39 instances [Server Details](#) | [Uninstall](#)

V2.1
Created on 12/10/08 by BrandonBaxter
Currently Installed:
Test-NorthAmerica(twserver1) - 0 instances
QA-NorthAmerica(twserver2) - 8 instances
Prod-NorthAmerica(jordan) - 38 instances
Prod-EMEA(twemea3) - 42 instances

V2
Created on 12/10/08 by BrandonBaxter
Currently Installed:
QA-NorthAmerica(twserver2) - 8 instances [Server Details](#) | [Uninstall](#)
Prod-NorthAmerica(jordan) - 27 instances [Server Details](#) | [Uninstall](#)

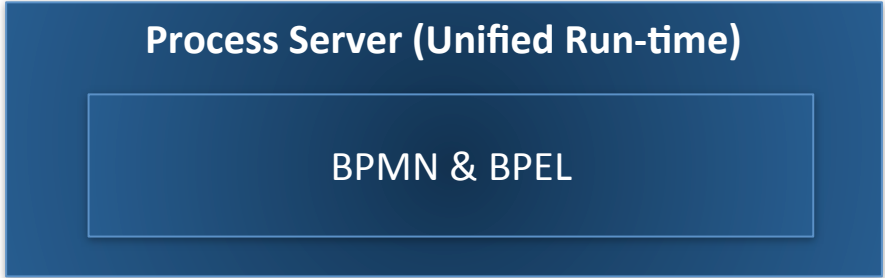
V1.1
Created on 12/10/08 by BrandonBaxter
Currently Installed:

- + Create New Snapshot
- + Open Main in Designer

About Snapshots...
A snapshot captures the state of the library items within a process application at a specific point in time. Snapshots usually represent a milestone or are used for playbacks or for installation.

Deployment Dashboard
See where instances are in-flight for each installed version of Process App

Single Process App deployed from Process Center



Both Process and Integration assets will be deployed from the Process Center in a single Installation process and package

Process made simple.

- > Capture your processes.
- > Share your thoughts.
- > Get your work done.



Overview

Features

Resources

Success stories

See How It Works

Try the full version of Blueworks Live for 30 days absolutely FREE!

[Free Trial >](#)
[Attend a Live Demo](#)
[Watch a Video Walkthrough](#)
[Download the Brochure](#)

The fastest way to take your process improvement efforts to the next level.

> Quick to start

With a simple sign-up process and over a dozen short instructional videos, you can get your first processes documented and automated in less than an hour. IBM Blueworks Live is designed with the business user in mind, allowing everyone in your organization to participate in process discovery, mapping and automation right from their web browser. Home to over 200,000 processes, Blueworks Live is an easy to use and affordable way to get your organization thinking about and acting on process improvement. Start right now by [signing up](#) for a free trial and see what Blueworks Live can do for you and your team!

> Quick to scale

PRC's Success Story

"Everyone is engaged in the process and people are participating; it's really worked out very well... Blueworks Live is as easy as it looks."
—Rachel Pace-Maron, Director of Operations, PRC

[Listen Now »](#)

Keep Everyone Current and Engaged

The screenshot displays the BlueworksLive user interface. At the top, there are navigation tabs for 'Work', 'Community', and 'Library', along with a search bar and user options like 'Cliff Vars - Admin Help Logout'. The main area is divided into several sections:

- PRIVATE ACTIVITY STREAM:** Shows a notification 'You have 2 tasks overdue.' followed by a list of activities for 'Today' and 'Yesterday'. Activities include workflow launches, task assignments, and process management actions by users like Jasmine Basral and Savitha Shivaram.
- PUBLIC BPM STREAM:** Displays a tweet from pjtcc about MS Dynamics partners (VARs) and a retweet from @workette.
- Items I'm Following:** A list of followed items such as 'Account Payable', 'Develop business strategy', 'Expense Reimbursement', and 'Manage change', each with a 'Recent Changes' link.
- Add Comment Overlay:** A modal window showing a comment by Jason Butler: 'Make sure to consult with the candidate and Manager the date will work. 2010/09/13 14:53:14 - Reply'.

Simple Enough for Novices, Rich Enough for Experts

The screenshot displays the IBM Business Process Management (BPM) interface for a hiring and onboarding process. The main window shows a process diagram with several stages: Select Candidate, Background Check, Offer, Add Candidate To HR Records, Orientation, and Begin Work. A detailed view of the 'Set Employee Status To Active' task is shown, including a participant list (HR Specialist), business owner (Human Resources), and various systems (HR Oracle System, ADP HR Portal). The process flow includes tasks like 'Input Employee Information into Database', 'Request Equipment', 'Request Workspace', 'Request Access Badge', 'Set Employee Status to Active', 'New Hire Orientation Class', 'Benefits Overview Class', 'Complete Forms', 'Watch Orientation CD', and 'Provide Orientation CD'. The interface also features a sidebar with various activities and a top navigation bar with search and user options.

Gain Insight Into Processes

The screenshot displays the BlueworksLive interface in Analysis Mode. The main window shows a process diagram for 'Hiring - Onboarding' with the following steps and tasks:

- Select Candidate:** Inform recruiter (Recruiter), Establish compensation package (Candidate), Establish start date (Candidate)
- Background Check:** Criminal record check (Candidate), Drug screen (Candidate), Review results (Hiring Manager)
- Offer:** Create offer letter (Hiring Manager), Transmit offer letter (Hiring Manager), Accept offer (Candidate), Withdraw from Process (Candidate), Accept Offer (Candidate)
- Add Candidate To HR Records:** Input employee information into database (HR Specialist), Request equipment (HR Specialist), Request workspace (Facilities Team), Request access badge (Facilities Team), Set employee status to active (HR Specialist)
- Orientation:** New hire orientation class (Candidate), Benefits overview class (Candidate), Provide orientation cd (Candidate), Watch orientation cd (Candidate), Complete forms (Candidate)
- Begin Work:** Meet manager (Hiring Manager), Obtain access badge (Hiring Manager), Obtain equipment (Hiring Manager), Go to workspace (Candidate)

On the left, a 'Participants' list shows 16 occurrences for 'Candidate' and 6 for 'Hiring Manager'. The interface includes navigation options like 'Discovery Map' and 'Process Diagram', and a bottom status bar with 'Invite New Users' and 'Currently Online: Maria Elavumkal'.

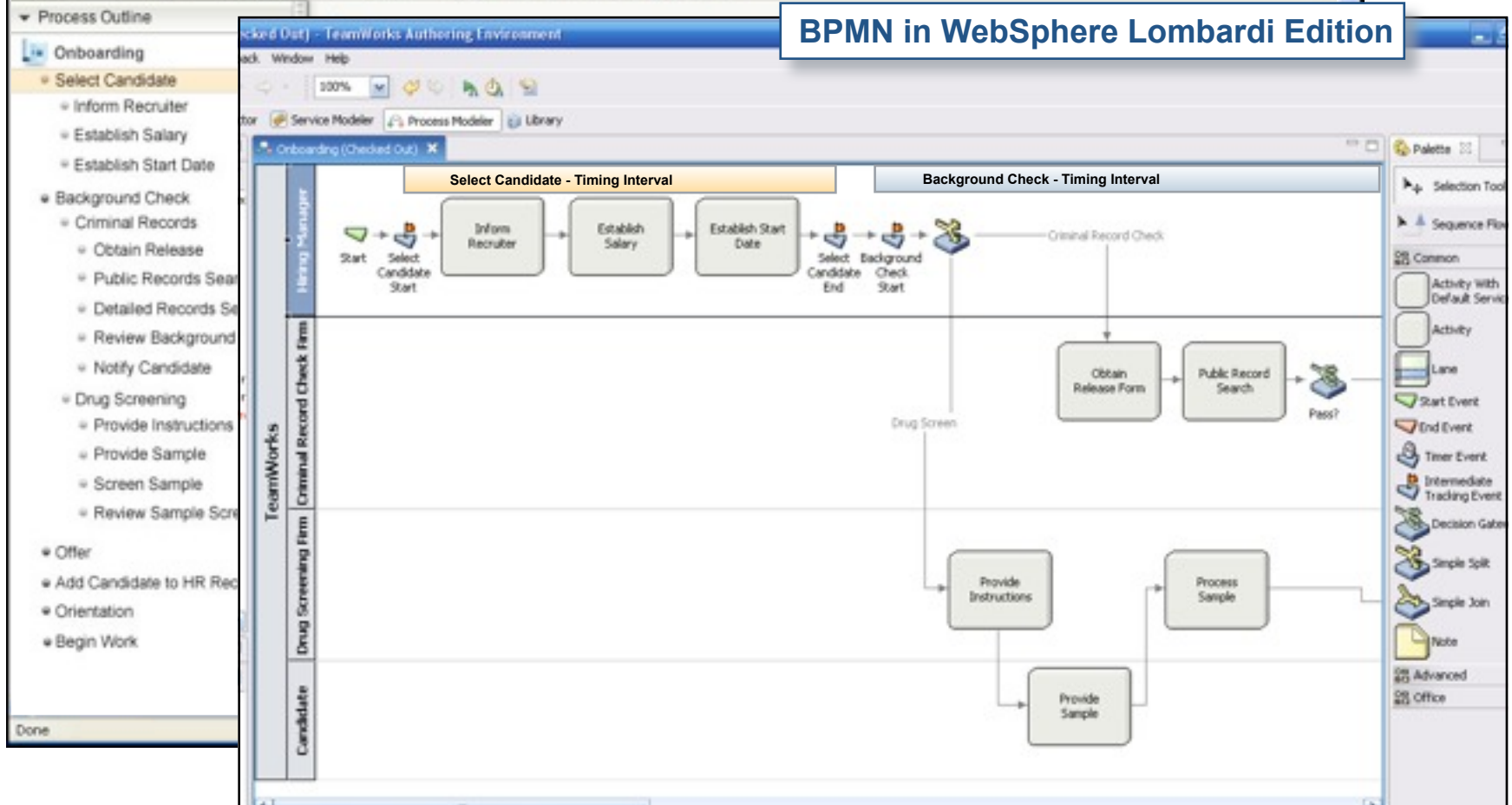
Rich Template Library

The screenshot displays the BlueworksLIVE Library interface. At the top, there is a navigation bar with 'Work', 'Community', and 'Library' tabs. The 'Library' tab is active, and a search bar is visible. Below the navigation bar, there are tabs for 'Spaces', 'Processes', 'Blogs', and 'Templates'. The main content area is titled 'Featured (10 Processes)' and shows four process templates: 'Accounting Services', 'Claims Payment', 'Develop business strategy', and 'Hiring - Onboarding'. The 'Develop business strategy' template is highlighted with a 'Preview' button and an 'Import' button. Below this, there is a 'Template Library (99 Processes)' section with a grid of process templates. A tooltip is visible over the 'Develop business strategy' template, providing details about its origin and usage permissions. The tooltip text is as follows:

Develop business strategy
1.2 Develop business strategy (10015) process from the Cross Industry Process Classification Framework provided by APOC. © APOC. © IBM. APOC and IBM grant permission for use and adaptation of the Process Classification Framework (PCF). For external use, APOC and IBM grant permission for i) for publication, distribution, and use, provided that proper copyright acknowledgement is made to APOC and IBM; and ii) to create derivative works provided the user denotes the source of the PCF. Under no circumstance shall the licensee (or anyone on its behalf) impose a royalty, fee, or any other consideration to a third party for the PCF.
Author: IBM

At the bottom of the interface, there is a footer with the IBM logo, 'Terms of Use', and an 'Invite New Users' button.

From business-only modeling... to the execution details.



“We can’t succeed unless we move process down to the desk level.”

- Deanna Wilson, Vice President, Global Process
Expeditors



Visibility

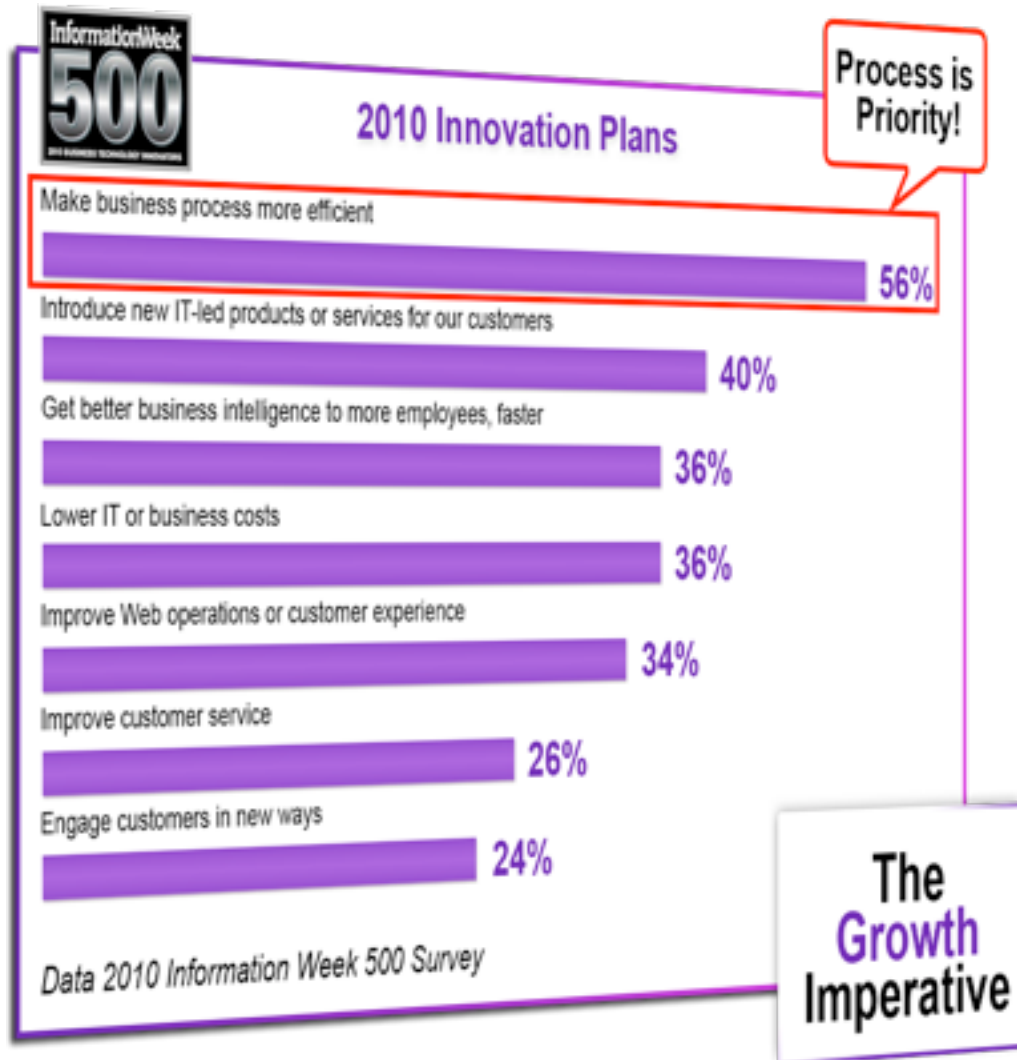


MGMT



Governance

Business Process Improvement is #1 Priority

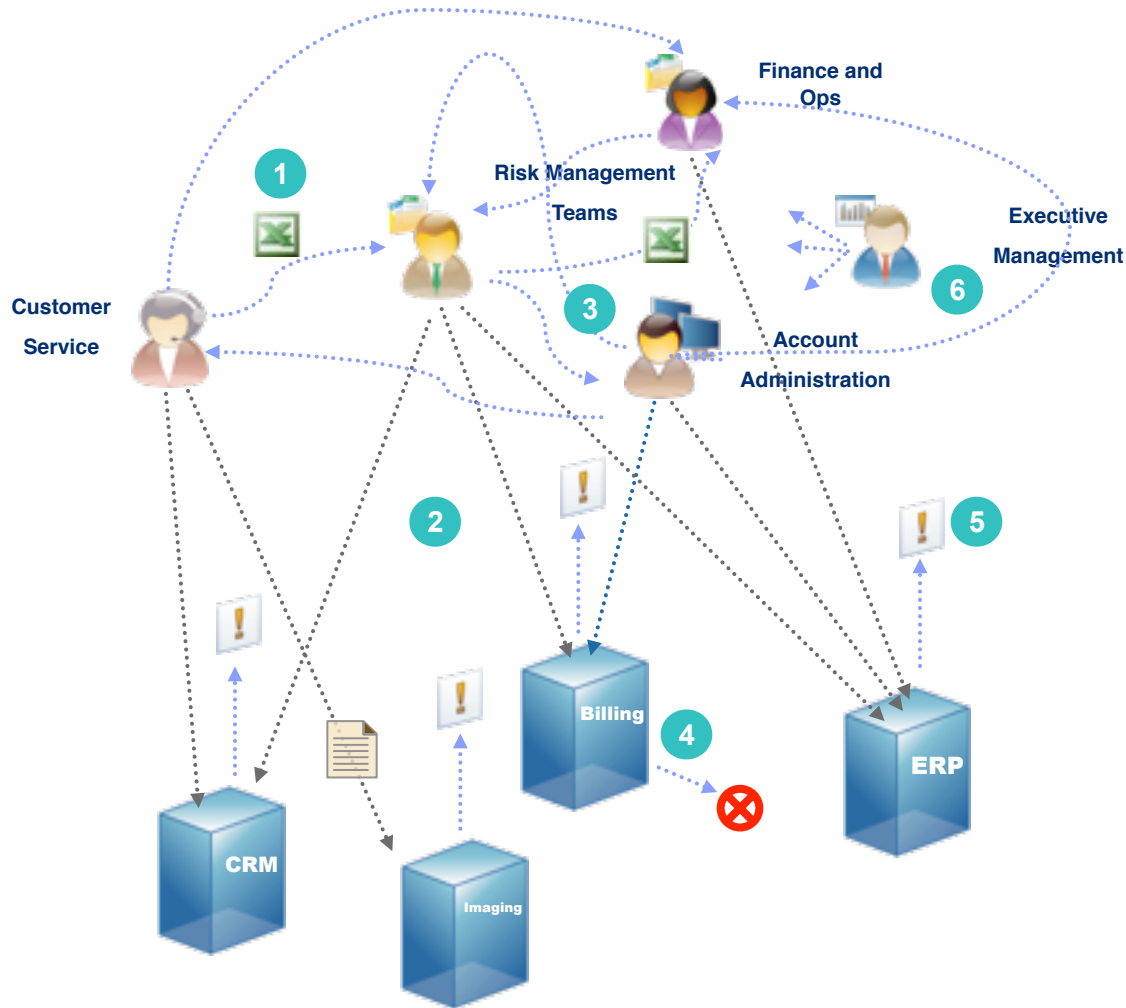


The Market is Clearly Telling Us ...

- Accelerating process improvement and efficiency is crucial
- Business Process and Business Rules Management deliver high value to clients
- Companies continue to invest
- Agile businesses have 45% higher ROI and 10% faster revenue growth¹

Information Week: September 2010

Business Chaos Begs for Process Improvement

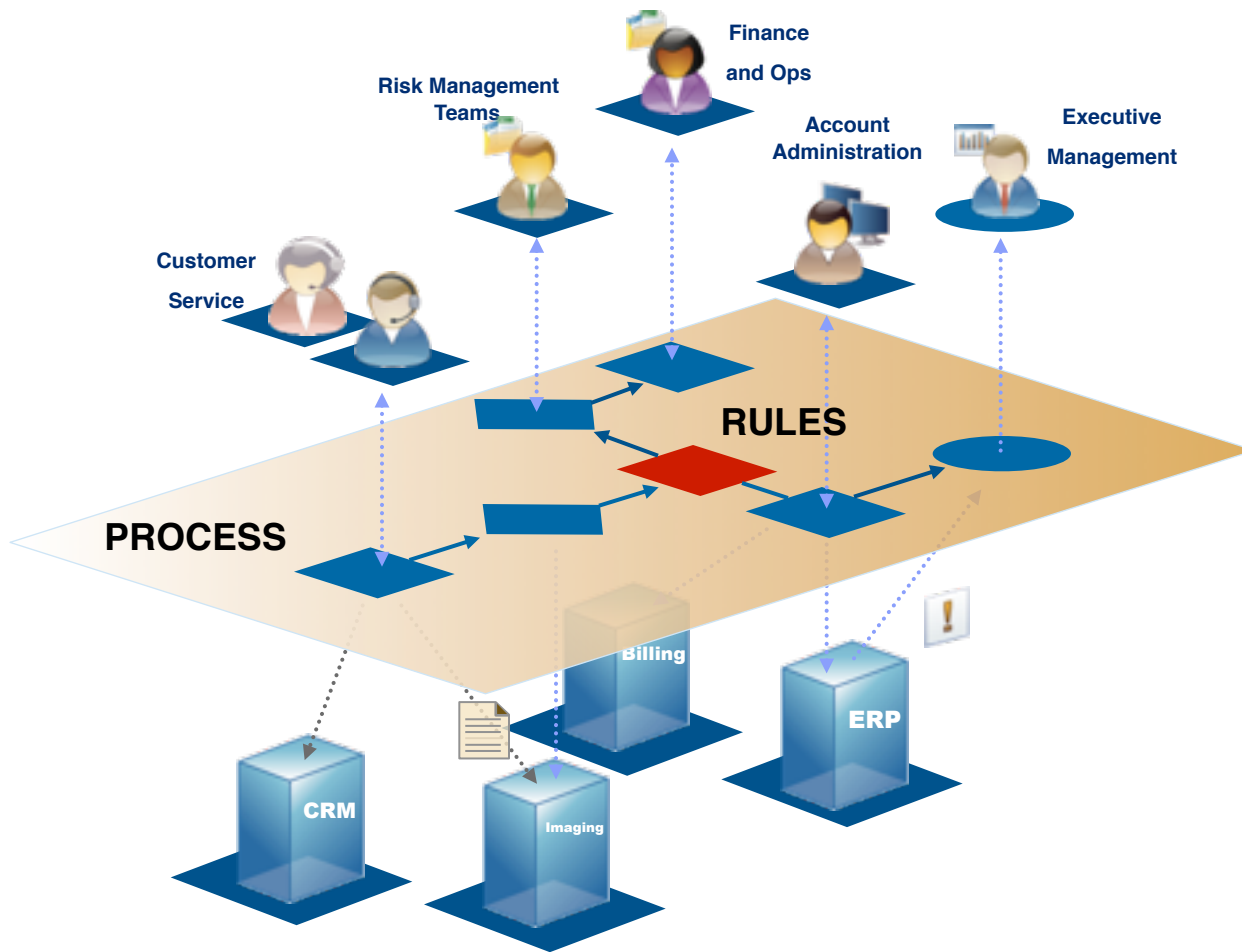


- 1 Informal Tasks and Communication (ex Paper or email)
- 2 Inefficient Working Environment Spans Systems
- 3 Inconsistent Prioritization and Decision Making
- 4 Incomplete or Inaccurate Data Flow Between Systems
- 5 Lack of Control Over System and Business Events (Exceptions)
- 6 Poor Visibility Into Process Performance

Customer Problems:

- ***Cannot Grow Efficiently***
- ***Poor Customer Satisfaction***
- ***Limited Visibility***

Business Process & Rule Management Bring Order to the Chaos

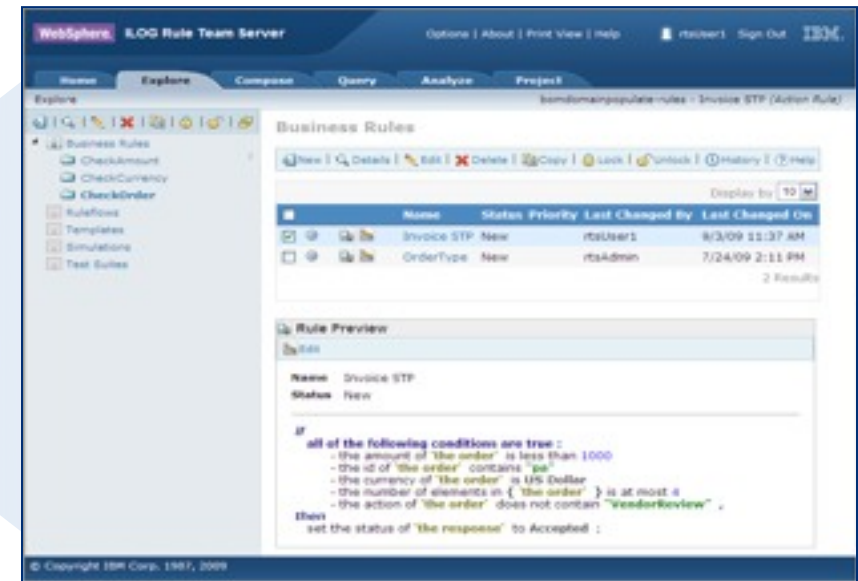
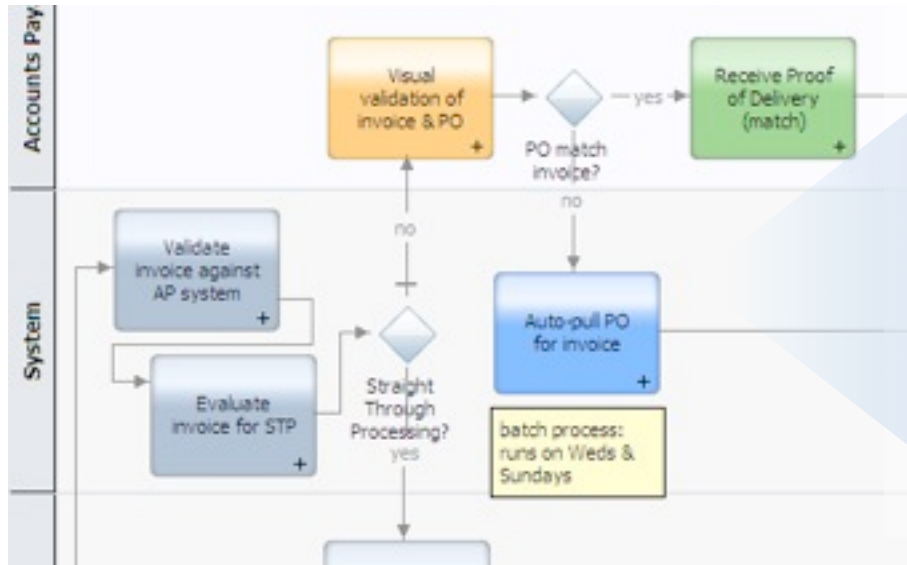


- 1 Automate workflow & decision making
- 2 Reduce errors and improve consistency
- 3 Standardize resolution across geographies
- 4 Leverage existing systems and data
- 5 Monitor for business events and initiate actions
- 6 Real-time visibility and process control

Customer Benefits:

- ***Huge Reduction in Manual Work, Errors***
- ***Faster, More Consistent Issue Resolution***
- ***Easier to Manage the Business***

Two-Pronged Approach to Business Process Improvement



Business Process Management

- Define and orchestrate the end-to-end process
- Combine automation with user interaction

Business Rules Management

- Define and execute specific decision points in processes and applications
- Automate and improve decisions

The Value of BPM and BRMS For System z

Leverage

- Mission-critical applications & processes
- Performance, robustness, & scalability
- Colocation
- Cost/ performance advantage

Modernize

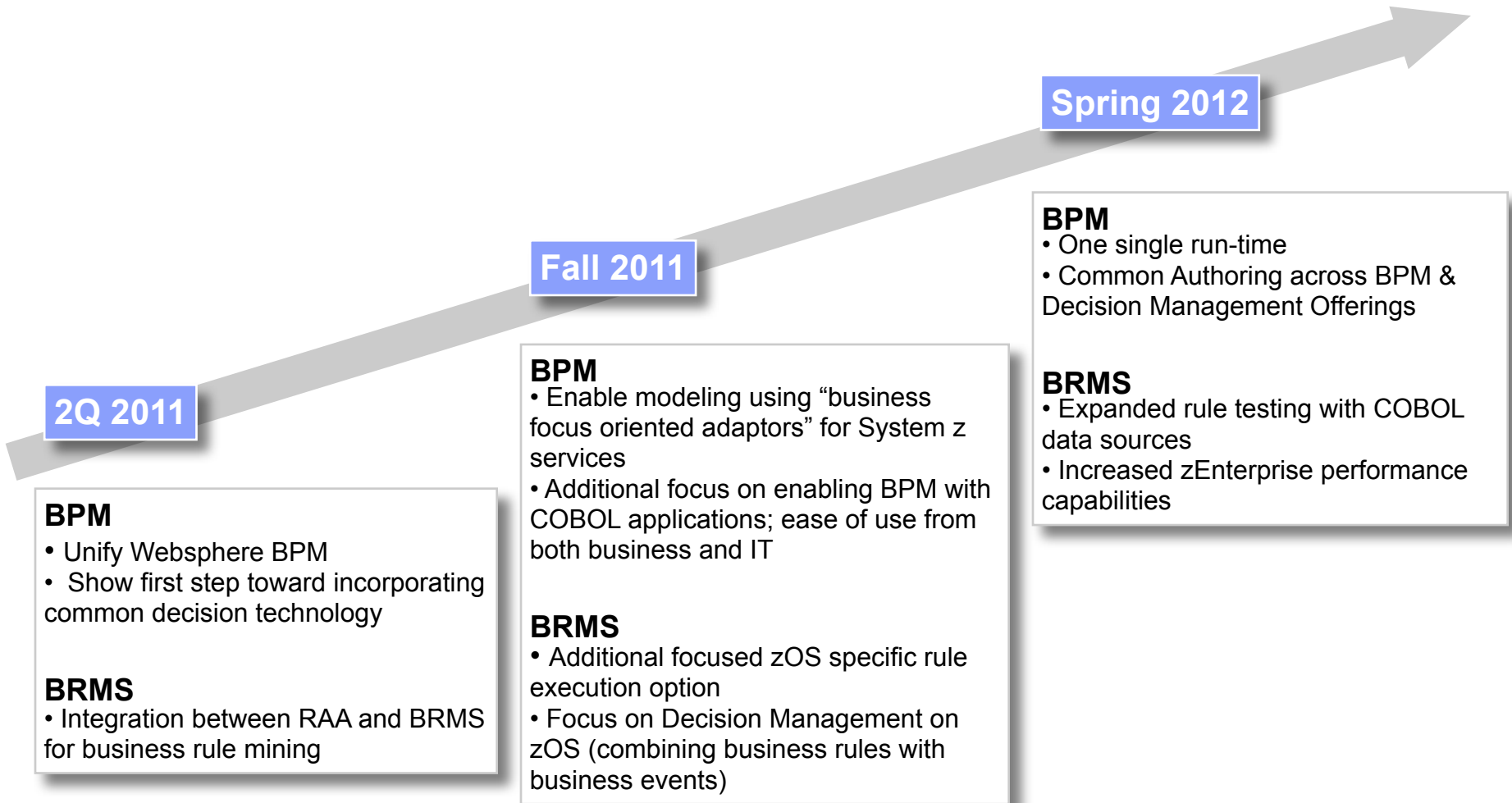
- Business agility
- Streamlining business applications for efficiency
- Extending business applications for new opportunities
- Leveraging investment in System z and zEnterprise

Unify

- Improved IT/LOB alignment, collaboration, governance and lifecycle management
- Seamless deployment across distributed and zEnterprise platforms
- Process, rule & event assets sharing and reuse



BPM and BRMS System z Roadmap



Getting Started

Harnessing BPM and BRMS Value on System z

- *Visit our web pages for our Redbooks and White Papers on Business Process Management and Business Rule Management*
- *Conduct a one-day modernization workshop*
- *Conduct a trial*

Check out these Web sites for more information, white papers, and trials:

<http://www-01.ibm.com/software/info/bpm/>

<http://www-01.ibm.com/software/websphere/products/business-rule-management/>

धन्यवाद
Hindi

多謝
Traditional Chinese

ขอบพระคุณ
Thai

Спасибо
Russian

Gracias
Spanish

Merci
French

Thank You
English

شكراً
Arabic

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

Teşekkürler
Turkish

감사합니다
Korean