

Business Process Management Products

Part 5 of an 8 part paper on Business Process Management (BPM)

The BPM marketplace

Automation, orchestration, collaboration, workflow, document management, BPM, BPA, BAM, BPF... Anyone who can effectively describe the difference between these terms will not help one iota when you try to understand what the next person means by them.

The number of 'BPM' products is mushrooming, and consolidating at the same time. Tibco has bought Staffware, and Oracle has bought Collaxa, a BPEL engine. In the BPM space, the BPMG currently lists over 400 vendors, including document management specialists.

BPM has become the de-facto acronym, although many others exist and continue to be invented.

Two industry bodies support BPM. They are the BPMG and BPMI. BPMI is responsible for many BPM standards including Business Process Modelling Language (BPML). Some vendors use BPML in their products, but it is far from universal. Vendors BEA, IBM and Microsoft have proposed BPEL (ex BPEL4WS), a similar but more restricted notation, which is used by integration and automation products.

The so-called *pure play* vendors are under pressure from products reaching in from established operators in the related fields of document management, enterprise application integration (EAI), and from ERP leaders.

Many vendors claim to be the leader in the field, but this is confused by a number of factors, including exactly how the market is defined, and without anyone publishing the indicators by which they claim to lead.

Both Gartner (July 2004) and Forrester (March 2004) have evaluated the BPM market. Comparing both analyses leads to further confusion as the apparent 'leaders' are different in each analysis.

Forrester considers the top ten players to be FileNet, Fuego, HandySoft, Intalio, Lombardi Software, Metastorm, Pegasystems, Savvion, Staffware and Ultimus. Gartner's analysis largely concurs with this statement.

The analyses show up a number of interesting facts about the BPM market:

- The market is not really consolidating
- No-one has emerged as a dominant force in the past one or two years
- A great many challengers exist
- The leading analysts do not wholeheartedly agree about what makes a BPM leader

So what is a BPM product?

BPM offerings are part programming language, part operating environment and part person replacement. Despite the array of advanced technologies available, those that employ artificial intelligence are highly specialized niche products. The leaders have products based on workflow, rules engines and process flow.

Some automation products use Java or a bespoke language to create their process flows. Others use graphical techniques or flowcharts so that analysts can model rather than having coders code.

There are two major features to a BPM product: the design time, and the run time environments.

Design time environment

In the design time environment, a designer must be able to specify:

- Hardware and software configuration
- Workflow
- Processes
- Rules
- Data
- Points of integration
- Presentation (to user)
- Roles and activities
- MI & activity monitoring

Runtime environment

At runtime, the execution engine schedules and orchestrates workflow and processes. A mechanism for viewing the activity of the engine must be available for monitoring and support.

Workflow management allows managers to view the current and historic load on any worker, and reassign work from one worker to another.

Dependencies

A BPM solution is usually dependent on external systems for integration with back office systems and access security.

Comparing and Selecting a BPM product

To compare BPM products, you can ask what clever technologies they use, but it won't help. You might ask the origins of the product, which could be in document management, workflow or as a business rules engine, and it may help to assess its strengths and weaknesses. You might look at how the process flows are created, how they run and how they are managed. Here is a list of questions that might help:

- How is the automation configured?
- How does it integrate with the systems it is automating?
- What does the user see (if anything)?
- What is available to the manager?
- What is available to support personnel?
- Who else like us uses your product?
- How are automation products delivered?
- Can it really automate what our people do?
- Are the technologies compatible with our way of working?

There is, in addition, one consideration that must come before the automation project, which is:

- How do we realize the benefits of automation?

A \$1M automation solution can easily save \$10M per annum on paper, but how do you realize that benefit? It is rarely as simple as removing the people whose work has been replaced by machine.

The above is a simplified list of questions. If you want a more testing list, look up CSC's *The Emergence of Business Process Management*, 2002.

Tranzax

Tranzax is a comparatively new product. It's creators, Clear Technology (Clear in the Gartner research), have just completed Series B venture capital funding. Tranzax currently occupies a niche in the insurance sector where we have automated new policy processes, recoveries (subrogation) and personal injury. All of these are complex manual and computerized processes, requiring integration with a number of modern and ageing back-end systems.

Tranzax is a tool for creating a virtual workforce by replicating, in software, the roles that people normally fulfill. Any piece of work that can be defined can be replicated, freeing up the users to concentrate on the expert 'human' work and leaving the drudgery to the machines.

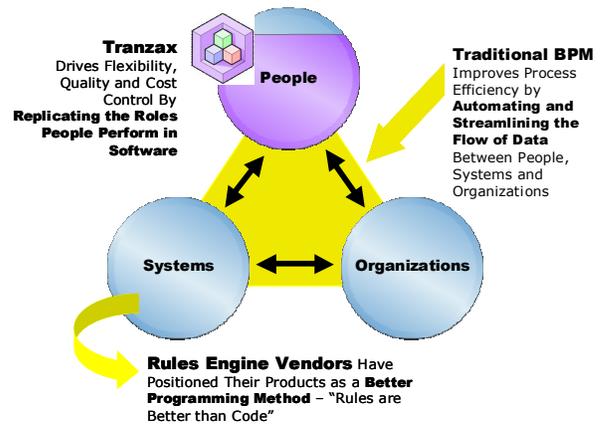


Figure 1. The Tranzax difference

Tranzax supports all of the typical BPM needs of workflow, process flow and rules based processing.

A Business Analyst will typically define the flows, leaving more technical integration and custom work to the programmers. A graphical editor allows process steps to be added and interlinked, and properties set (see figure 2).

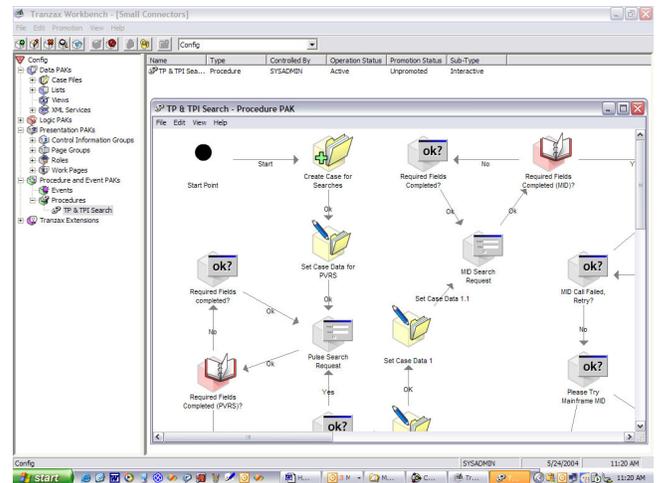


Figure 2. Tranzax workbench

Tranzax comprises five products, Tranzax Workbench (as shown above), Team Manager, Environment Manager, Administrator Console and Case Agent.

Each Tranzax solution creates an automation daemon (the execution engine or runtime component), which runs on a centralized server.

All custom work and integration work is done in Microsoft .Net, although work continues apace for the Java platform.

Tranzax Workbench

Workbench is the integrated development environment used to create a Tranzax automation solution (see figure 2).

Tranzax Team Manager

Workers are assigned to teams and worker and team properties are set.

Tranzax Environment Manager

Environment manager is used to set up the arena in which the Tranzax solution will be created and run. It specifies servers and development, test and live configurations.

Tranzax Administrator Console

Admin console allows the runtime technical support team to see what procedures are running, or queued, and what servers are assigned.

Tranzax Case Agent

Case agent is where all of the interactive work is done. It is a browser based application where the viewer is taken from page to page based on rules applied to the data entered. Case Agent has two main types of window. A work page shows a worker what work is queued to them, and what functions are available to them. A data page is a data entry or viewing page.

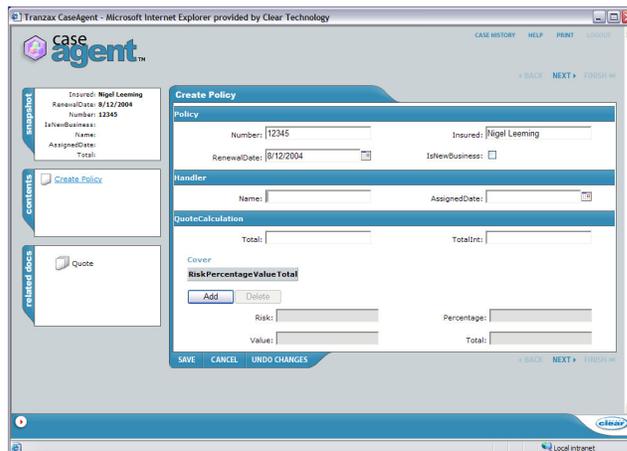


Figure 3. A typical data entry page in Tranzax

Tranzax Daemons

A Daemon is a Windows service running and coordinating the automations in a single Tranzax solution.

A typical Tranzax automation

A Tranzax solution is deployed on a set of three types of server, namely a web/application server, a process server, and a database (SQL) server. Load balancing supports more than one of each server if required.

There are two types of procedure created in the Workbench, which are interactive and automated procedures.

The web/application server serves up pages to the user and manages the process flows of interactive procedures. The process server runs the daemons, which runs the automated procedures and require no user intervention.

Both web/application and process servers share a database server.

In the insurance industry, data is held and maintained in back-office systems, and Tranzax communicates with them through an integration hub.

For more details of a Tranzax solution, see paper 7.

Other Papers in this set

- Paper 1: What is business process management?
- Paper 2: Why automate business processes?
- Paper 3: Business process management terms
- Paper 4: How people work
- Paper 5: Business process management products
- Paper 6: Automation Oriented Architecture
- Paper 7: Case studies and common pitfalls
- Paper 8: The future of BPM