

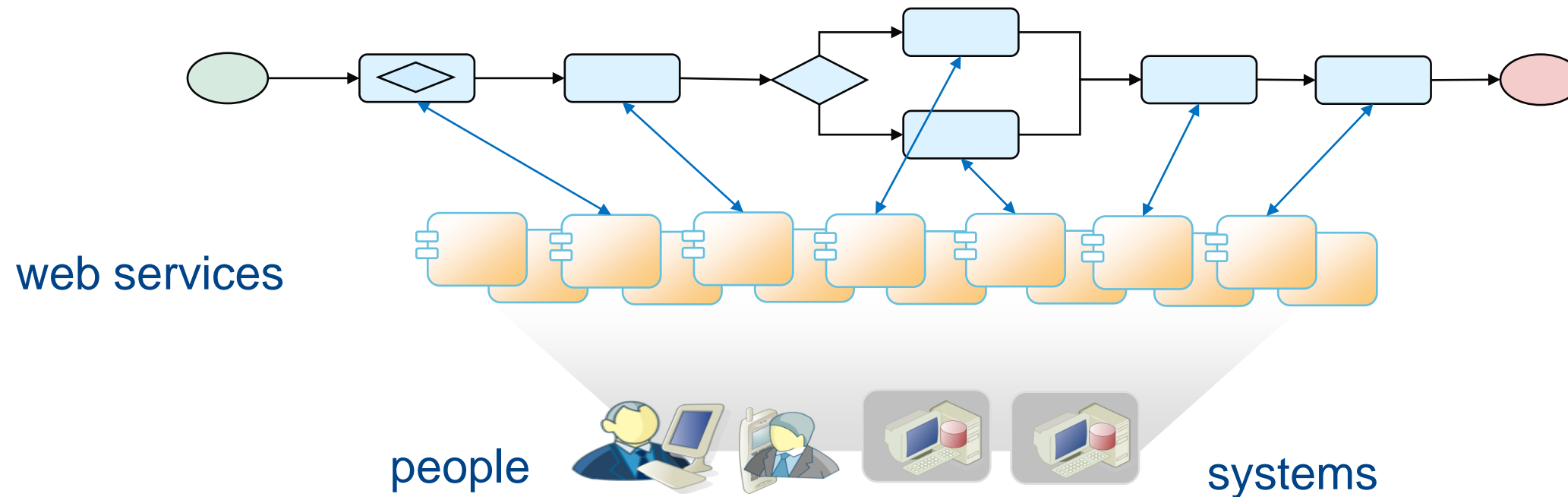
Workflow

Cordys BOP 4.1 Fundamentals

CORDYS

- ◆ Work Flow Management
- ◆ Work Flow Implementation
 - ◆ Human Interaction - Info
 - ◆ Human Interaction - Tasks
- ◆ Implementing Work Flow with Cordys
 - ◆ Task Distribution
 - ◆ Task Execution (Inbox)
 - ◆ Page Flow
 - ◆ Business Calendars

◆ Executable Business Process Models



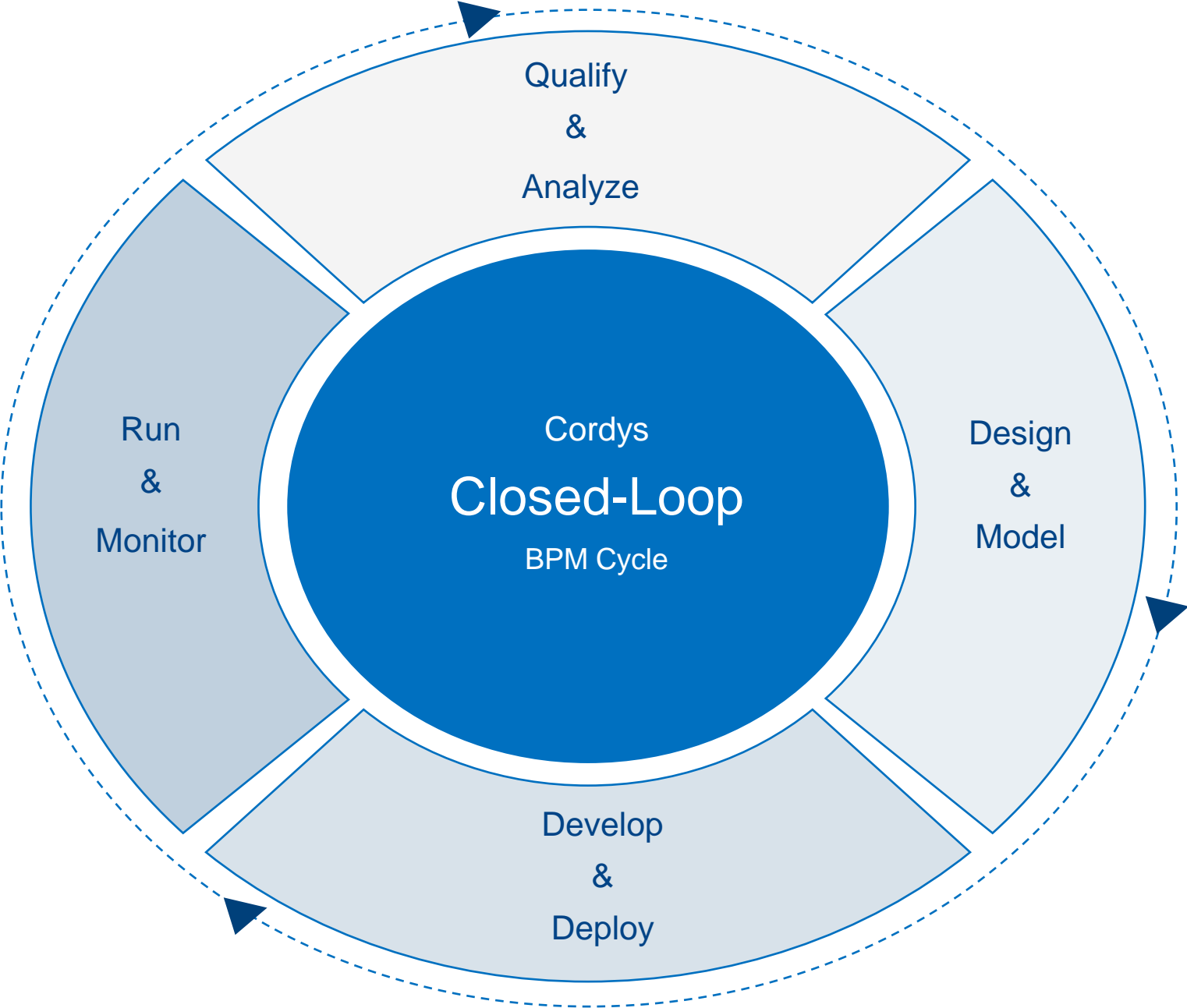
- ◆ Interaction of systems and people according to defined processes
- ◆ Usually Business Processes do have human interaction (>80%)







- ◆ Human interaction
- ◆ Several users/roles involved
- ◆ Tasks are dependent on each other
- ◆ Task Flow is defined with BPM
- ◆ Several systems involved

- ◆ Task
 - ◆ Tasks are distributed via Task Queues
 - ◆ Data entry or approval required
 - ◆ Related information is presented
 - ◆ Work instruction

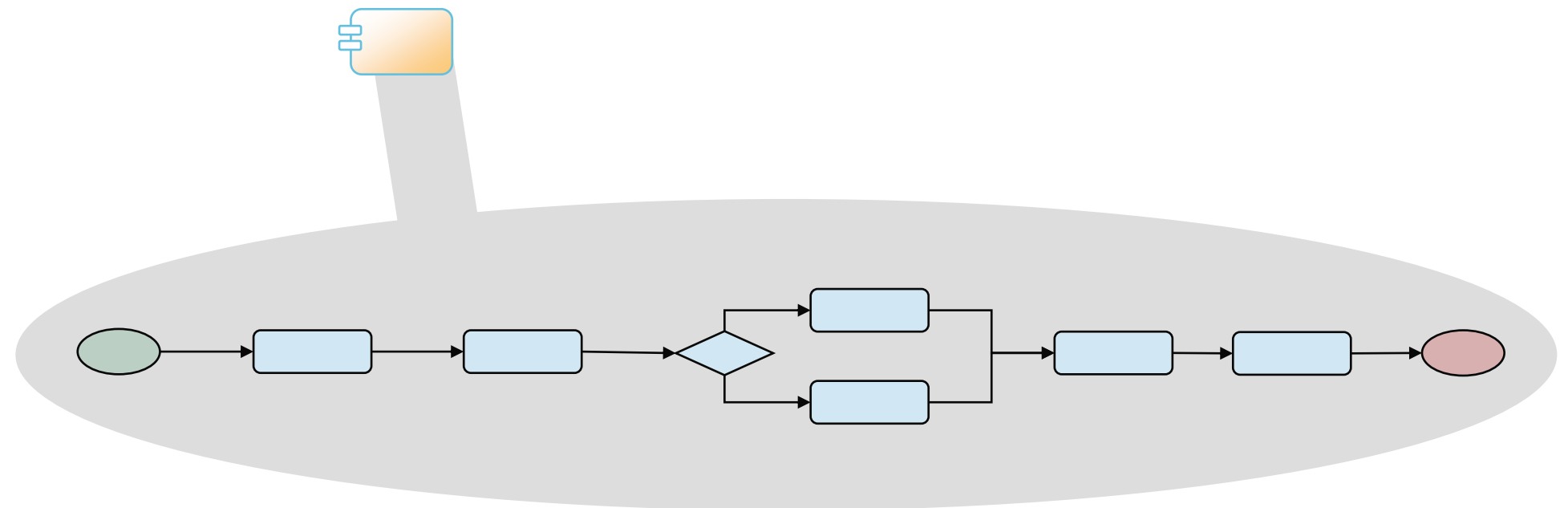
- ◆ Who, what, when
- ◆ Control
 - ◆ Status overview
- ◆ Legislation
 - ◆ Audit
- ◆ Optimize
 - ◆ Lead time
 - ◆ Quality (consistency)

Closed-Loop Business Process Management



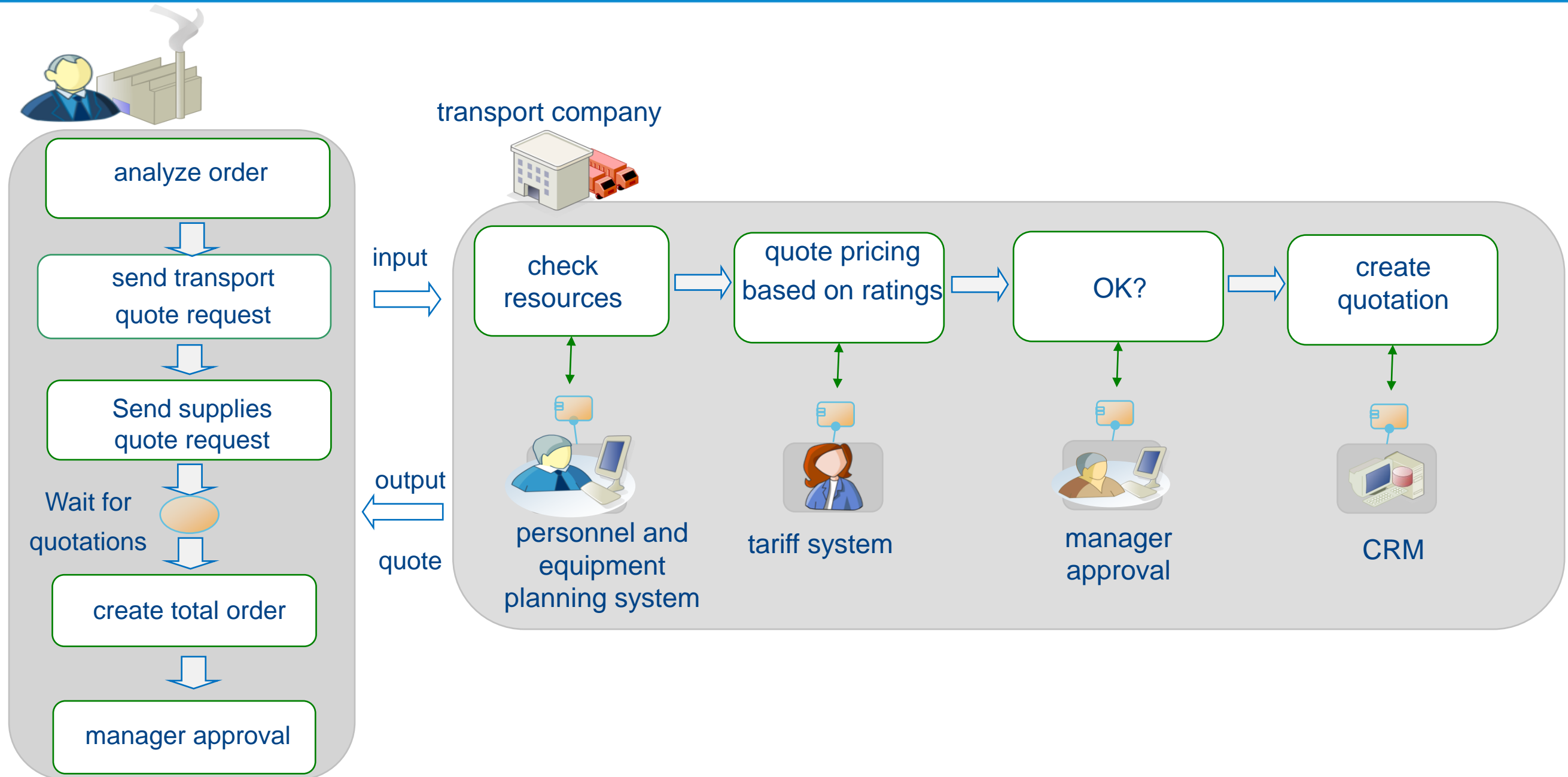
ROLES INVOLVED		
Qualify & Analyze	Design Model	 Business User
		 Business Analyst
Develop & Deploy	Run & Monitor	 Architect
		 Developer
		 Administrator
		 Business User

- ◆ BPM started as Web Service
- ◆ Service Level Agreements (SLAs)
 - ◆ Monitor from start to end
 - ◆ Optimize implementation
- ◆ Examples:
 - ◆ Member registration
 - ◆ Support services
 - ◆ Hardware installation



Value Chain Example

CORDYS



- ◆ Work Flow Management
- ◆ Work Flow Implementation
 - ◆ Human Interaction - Info
 - ◆ Human Interaction - Tasks
- ◆ Implementing Work Flow with Cordys
 - ◆ Task Distribution
 - ◆ Task Execution (Inbox)
 - ◆ Page Flow
 - ◆ Business Calendars

◆ Informative

- ◆ Receivers act on basis of information they get.
- ◆ Other activities do not depend on action of this user
- ◆ Asynchronous: Does not wait for user action

◆ Examples

- ◆ Changed Policy
- ◆ News
- ◆ New Hire
- ◆ Alerting (trouble, opportunities)

◆ Questions

- ◆ What is the contribution to the business?
- ◆ How can you improve your business performance?

- ◆ What is the contribution to the business?
 - ◆ Assurance of notification
 - ◆ Alerts inform people as fast as possible
- ◆ How can you improve the business process?
 - ◆ Measure if message is read
 - ◆ Measure if action is taken: use tasks!
 - ◆ Reuse tasks/processes

- ◆ Work Flow Management
- ◆ Work Flow Implementation
 - ◆ Human Interaction - Info
 - ◆ Human Interaction - Tasks
- ◆ Implementing Work Flow with Cordys
 - ◆ Task Distribution
 - ◆ Task Execution (Inbox)
 - ◆ Page Flow
 - ◆ Business Calendars

◆ Task

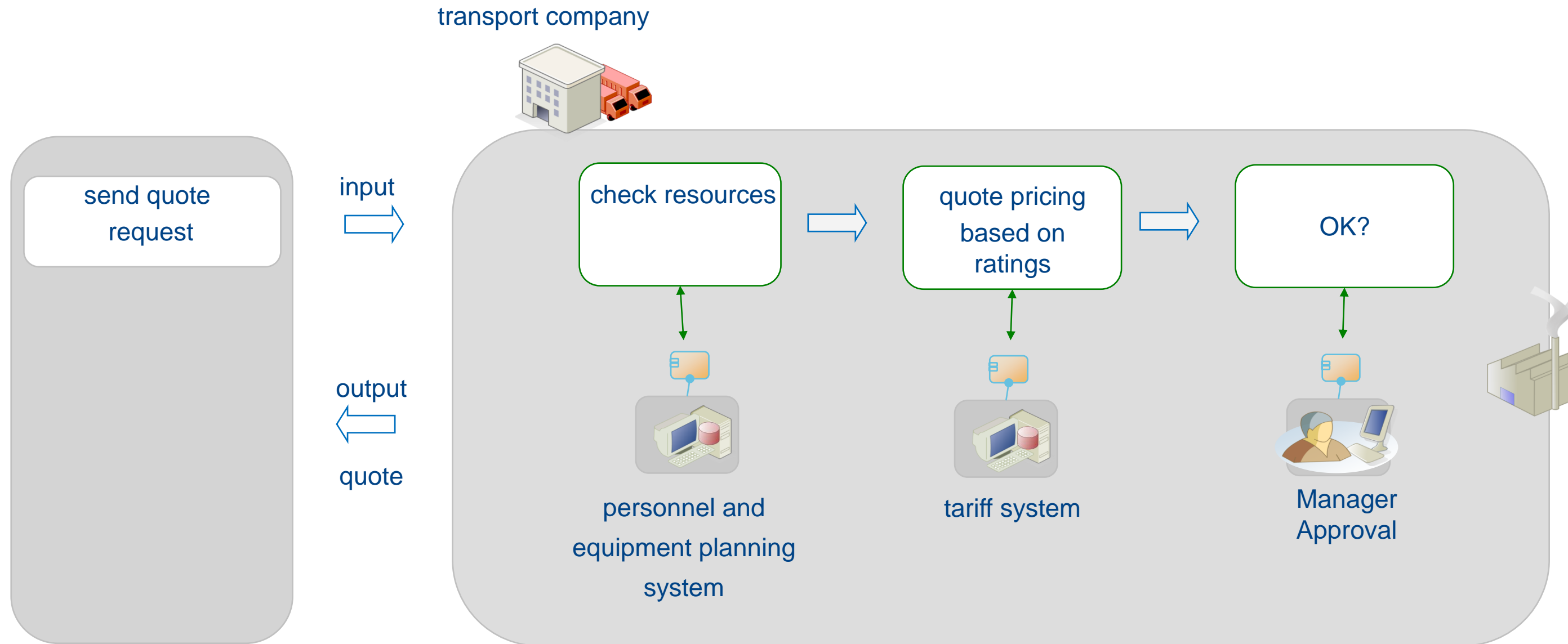
- ◆ Receivers have to act
- ◆ Synchronous: process waits for user action
- ◆ Other activities depend on the action
- ◆ Often Tasks are distributed to groups of users

◆ Examples

- ◆ Approvals
- ◆ Status Update/Timing Indication
 - ◆ Supplies have arrived
- ◆ Information Input
 - ◆ Order
 - ◆ Quotation
 - ◆ Reservation
 - ◆ Booking
- ◆ Messages Alerts: threat, opportunity etc.

Human Interaction Process Example

CORDYS



Questions:

- ◆ Is this a short lived or a long lived process?
- ◆ How is the quote requester updated with the quotation?
- ◆ What happens if the manager is ill?
- ◆ How can you improve your business performance?

Typical aspects:

- ◆ Long lived process
- ◆ Send quotation would be the last step in the process (could be done by email)

Improve Process Performance:

- ◆ Approval is made on basis of the gathered (proposed) data
- ◆ Approve small amounts without manager approval
- ◆ Use groups to handle tasks (task distribution)
- ◆ Use timeouts to signal problems (escalation management)

◆ Multi Role Approval

◆ Design approval

- ◆ Architects

- ◆ Fire department

- ◆ Government legislation

- ◆ Quotations

- ◆ Health Insurance

◆ Typical

- ◆ Involvement of documents

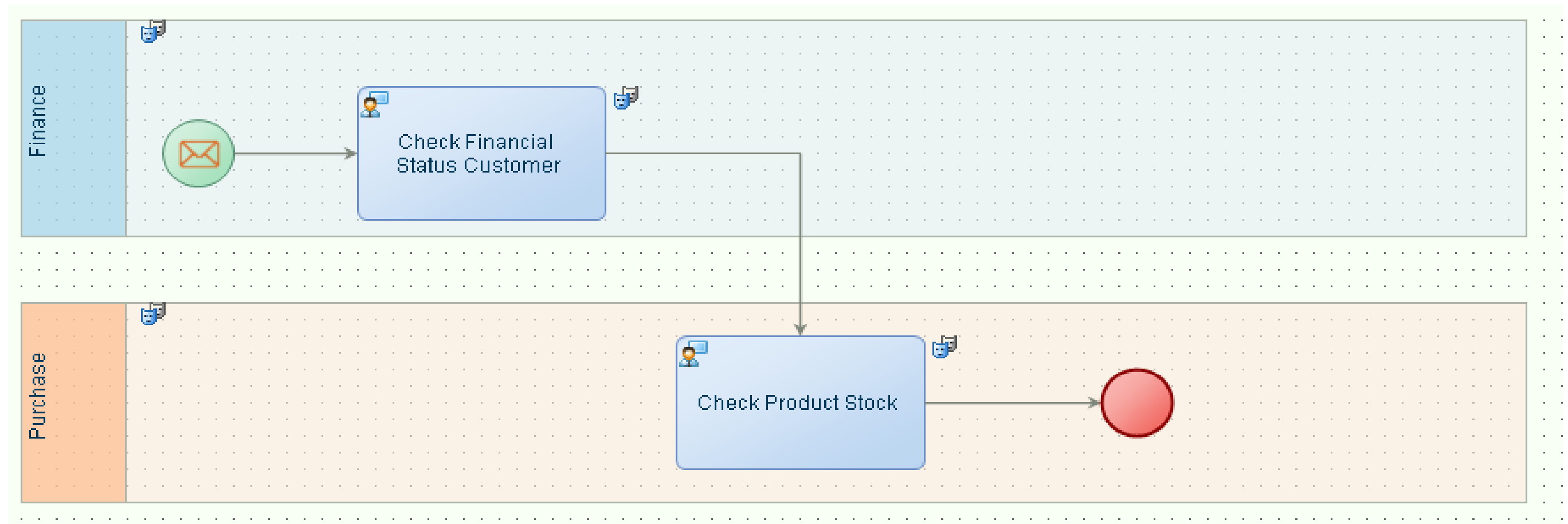
- ◆ Several roles/perspectives

- ◆ Work Flow Management
- ◆ Work Flow Implementation
 - ◆ Human Interaction - Info
 - ◆ Human Interaction - Tasks
- ◆ Implementing Work Flow with Cordys
 - ◆ Task Distribution
 - ◆ Task Execution (Inbox)
 - ◆ Page Flow
 - ◆ Business Calendars

- ◆ User Interface (Task)
- ◆ Work List
- ◆ Swim Lane
- ◆ Role
- ◆ User
- ◆ Organizational Model
 - ◆ Organizational Unit /Teams
- ◆ Manager (Work List / Team)

Swim Lanes

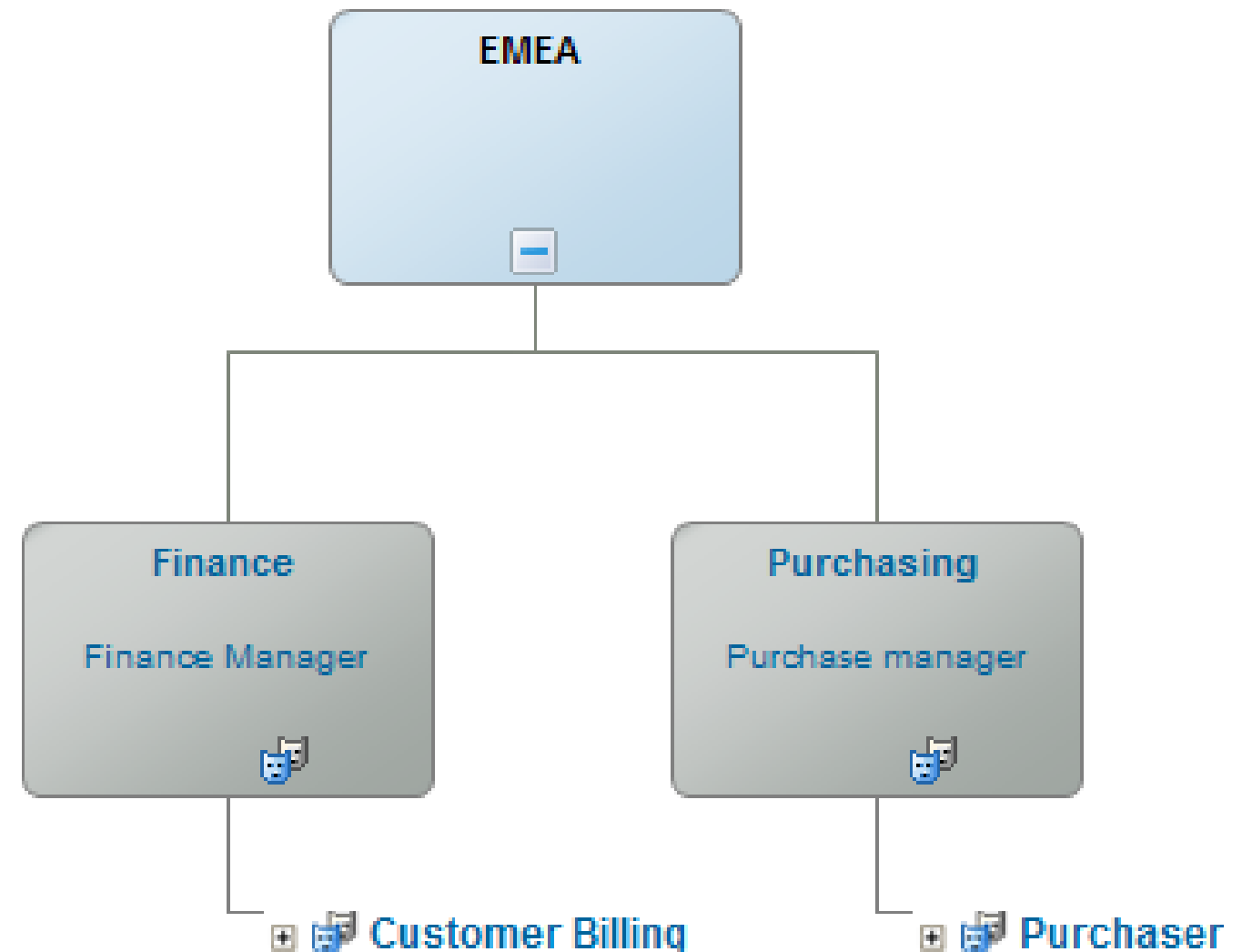
- ◆ Horizontal or Vertical
- ◆ Assignee Role or Team (Organizational Unit)



Organization Model

CORDYS

- ◆ Organization units (dependent, independent, assistant units, custom)
- ◆ Organization resources (roles)
 - ◆ Escalation Manager
- ◆ Organization relationships
- ◆ Sub-diagrams



Organization Unit Usages

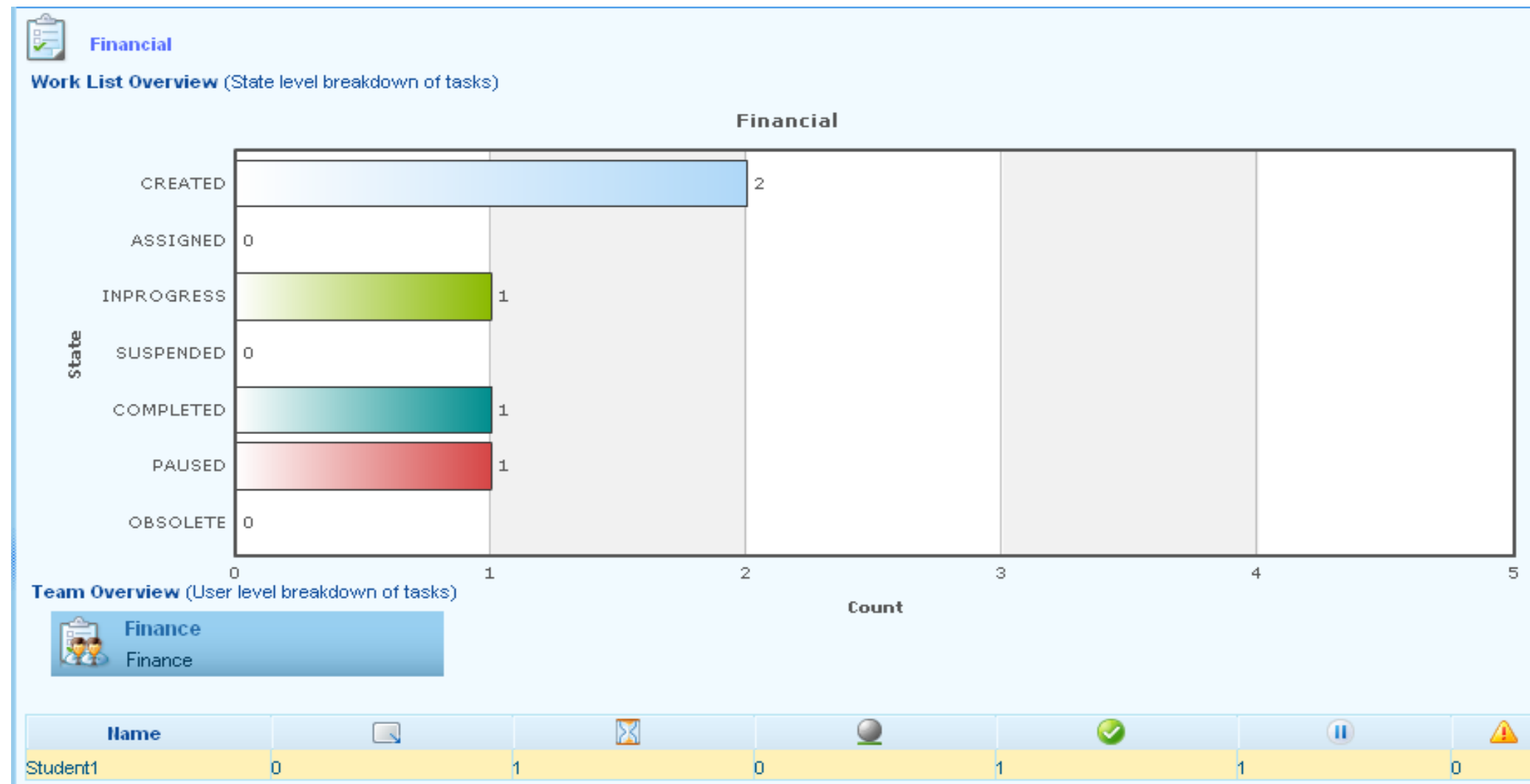
CORDYS

- ◆ BPM assignee type for activities and swimlanes
- ◆ Assign users to teams
- ◆ Inbox work list entry

The screenshot displays the CORDYS user interface with several key components:

- BPM Workflow:** A swimlane diagram on the left shows two lanes: "Finance" and "Purchasing". The "Finance" lane contains an activity box labeled "Check financial status customer" preceded by an envelope icon.
- User Manager:** A panel below the BPM diagram features a "Teams - Users" dropdown menu, a search input field, and a "Search" button. Below this is a "Teams" section listing three teams: "EMEA", "Finance", and "Purchasing", each with a small organizational chart icon.
- My Inbox:** A large panel on the right titled "My Inbox" with the subtitle "Receive and respond to Cordys tasks and notifications." It includes a "Customization" sidebar and a main area with links for "Personal Tasks", "Notifications", and "All Tasks". Below these links are tabs for "Work List(s)" and "Case(s)".
- Purchasing Panel:** A smaller panel on the far right titled "Purchasing" includes a "View" dropdown menu set to "Select..." and a row of icons for "Stat..." and "Activity".

- ◆ Decouples organizational units from task assignee
 - ◆ Dynamically add teams to a work list
- ◆ Work List Manager
 - ◆ Manage tasks
 - ◆ Overview of tasks



- ◆ Work Flow Management
- ◆ Work Flow Implementation
 - ◆ Human Interaction - Info
 - ◆ Human Interaction - Tasks
- ◆ Implementing Work Flow with Cordys
 - ◆ Task Distribution
 - ◆ Task Execution (Inbox)
 - ◆ Page Flow
 - ◆ Business Calendars

Cordys Notification Service

CORDYS

- ◆ Dispatched by Notification Service
- ◆ Notification Preferences (send to)
 - ◆ Cordys Inbox
 - ◆ E-Mail
- ◆ Message types
 - ◆ Info
 - ◆ Task

The screenshot displays the 'My Inbox' window of the Cordys Notification Service. The window title is 'My Inbox' and it contains the instruction 'Receive and respond to Cordys tasks and notifications.' The interface is divided into two main sections: a left sidebar and a main content area.

Left Sidebar:

- Customization:** Includes 'Personal Tasks', 'Notifications', and 'All Tasks'.
- Work List(s):** Includes 'Cordys Fundamentals Trainee', 'Customer Billing', 'Finance (1)', 'Finance Manager', 'Purchase manager', 'Purchaser', and 'Purchasing'.

Main Content Area:

The main content area is titled 'Finance' and features a 'View' dropdown menu set to 'Select...'. Below the menu is a toolbar with various icons for task management. The central part of the main content area displays a table of tasks.

	Stat...	Activity	Process Name	Assignee	Received Date	Start
<input type="checkbox"/>	!	Financial status check for cus	com/company1/myapplication/	Student1	24 Feb 2012 15:04	24 Feb
<input checked="" type="checkbox"/>	!	Financial status check for cus	com/company1/myapplication/	Student1	24 Feb 2012 15:04	24 Feb
<input type="checkbox"/>	!	Financial status check for	com/company1/myapplicat		24 Feb 2012 15:03	24 Feb

- ◆ Work Flow Management
- ◆ Work Flow Implementation
 - ◆ Human Interaction - Info
 - ◆ Human Interaction - Tasks
- ◆ Implementing Work Flow with Cordys
 - ◆ Task Distribution
 - ◆ Task Execution (Inbox)
 - ◆ Page Flow
 - ◆ Business Calendars

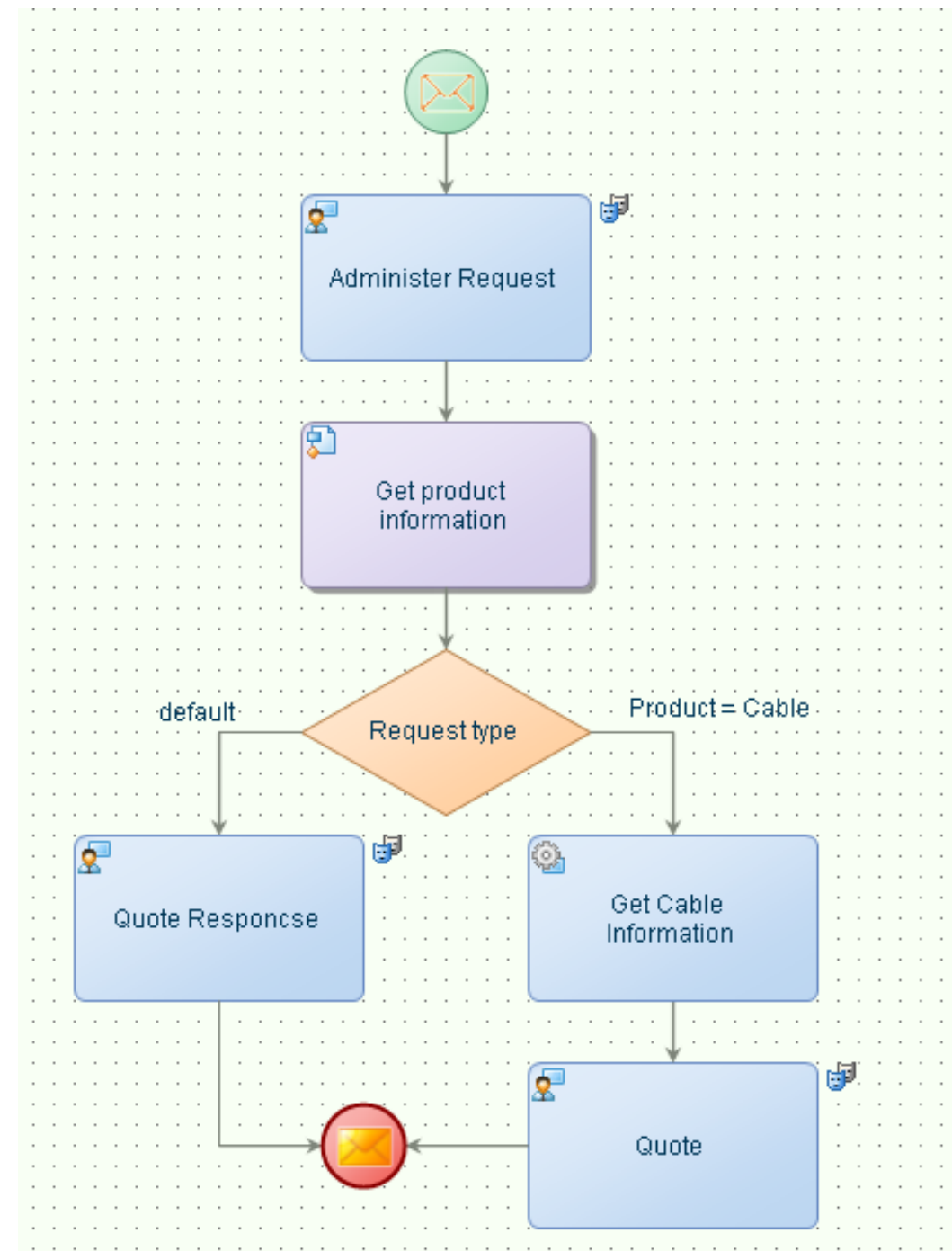
- ◆ Flow is controlled by a BPM
- ◆ Forms open in a Task Box one after another
- ◆ Possibly started from an XForm

◆ Restrictions

- ◆ No parallel activities
- ◆ No Notifications

◆ Examples

- ◆ Help Desk
- ◆ Service Desk
- ◆ Call Center



- ◆ Wizard-like behavior
- ◆ No need to go back to inbox
- ◆ Make UI Flow Visible
- ◆ Enables measurement of activity per form
- ◆ Server-side logic

=> Speed of execution

=> Usability

=> Documentation / Maintenance

=> Monitor & Analyze

=> Security

- ◆ Work Flow Management
- ◆ Work Flow Implementation
 - ◆ Human Interaction - Info
 - ◆ Human Interaction - Tasks
- ◆ Implementing Work Flow with Cordys
 - ◆ Task Distribution
 - ◆ Task Execution (Inbox)
 - ◆ Page Flow
 - ◆ Business Calendars

- ◆ Define operating hours for the business
- ◆ Define calendar exceptions (holidays, weekend workdays)
- ◆ Import exceptions via calendar files (iCal)
- ◆ Usages in BPM
 - ◆ Tasks (duration and start time)
 - ◆ Time outs
 - ◆ Delay

Business Calendars cont'd

10

Main company calendar - Business Calendar

Default Week CalendarCalendar ExceptionsTime Zone Settings

Name

Main company calendar

Description

Default company calendar

<input type="checkbox"/> Day	Start Time	End Time
<input type="checkbox"/> Monday	09:00	17:00
<input type="checkbox"/> Tuesday	09:00	17:00
<input type="checkbox"/> Wednesday	09:00	17:00
<input type="checkbox"/> Thursday	09:00	17:00
<input type="checkbox"/> Friday	09:00	17:00

10

Main company calendar exceptions - Business Calendar Exceptions

Name

Main company calendar exceptions

Description

Exceptions to the normal calendar

<input type="checkbox"/> Date		Non Working Day	Start Time	End Time	Description
<input type="checkbox"/> 10/21/2011	<div>10</div>	<input checked="" type="checkbox"/>			Banking holiday
<input type="checkbox"/> 10/22/2011	<div>10</div>	<input type="checkbox"/>	08:00	16:00	

Thank You

Questions?