

Frequently Asked Technical Questions BizFlow[®] Platform for Business Process Management and Collaborative Workflow

Q: How is BizFlow different from Visio or other graphical modeling tools?

A: Applications such as Visio provide tools for graphically illustrating tasks and the flow of work. These models are essentially static drawings. BizFlow models are fully configured, actionable processes implemented by the BizFlow engine. The model accurately reflects the runtime process because it is the runtime process. BizFlow's graphical modeling environment enables a business user to configure activity and transition details such as actor, action, business rules, deadlines, and other information.

Q: What components are packaged with BizFlow?

A: BizFlow contains:

- Scalable, reliable business process management engine deployable on both Microsoft and Unix platforms
- Process Designer, a graphical process modeling environment that includes configurable adapters to business systems
- Customizable, portal-ready Web interface providing access to all BizFlow functionality, such as work initiation and process participation, ad-hoc reporting, workflow monitoring, system administration, and more
- Forms Designer to easily create intelligent electronic forms

A typical BizFlow installation also requires a data repository (Oracle, SQL Server, or DB2) and a web server supporting Java Server Pages and servlets (Tomcat, Weblogic, or WebSphere).

Q: Does BizFlow provide a graphical process modeling environment that can be used by business analysts and managers, reducing dependency on my IT staff and improving communication?

A: Yes. BizFlow's graphical modeling environment provides a point-and-click interface for designing processes. Activity icons and transition arrows are dropped onto a palette; users configure activity properties such as actor, business and transition rules, applications and documents relevant to the activity, routing information, and more through property editors. BizFlow further simplifies process modeling by supporting the ability to import MS Project files and Visio basic shapes, generating BizFlow process models from existing files within seconds. BizFlow supports existing electronic files and applications and provides an easy-to-use forms designer to create intelligent forms supporting pre-population of data from a database, calculations, electronic signatures, and more. Typically, the IT staff configures system integration points for automatic activities within the process. BizFlow simplifies this effort by providing adapter activities with rapid configuration through property editors.

Q: Is BizFlow standards-based?

A: Yes. Supporting Java, web, database, directory, messaging, and other types of standards, BizFlow provides a solid platform for integrating legacy, mainframe, and enterprise systems, as well as newer J2EE and .Net applications. Providing three APIs — C++, Java, and SOAP — BizFlow is extensible for today's technologies and future investments.

Q: How can BizFlow add value to my Web Services development efforts?

A: As a Web Services-ready platform, enterprises can use BizFlow to request, broker, and deliver Web Services, using web-based tools and portal-ready solutions for employees, partners, and customers. As a Web Services consumer, BizFlow can request Web Services in the context of business processes (e.g. invoke a flight schedule service within a Travel Request process). As a Web Services broker, BizFlow may coordinate the interaction of several Web Services (e.g. in addition to obtaining flight schedule information, BizFlow may also invoke Web Services of several hotels to attain rate information and then route the Travel Request appropriately based on BizFlow business rules). BizFlow processes themselves can be invoked as Web Services, extending the benefits of collaboration and interoperability to include end-to-end service fulfillment. For example, the complete Travel Request process may be made available to users by publishing it as a Web Service.

Q: Does BizFlow provide integration with business applications such as e-mail, relational databases, and messaging products?

A: Yes. BizFlow provides agents or adapters for messaging systems such as IBM MQ Series and MS MQ, EAI transformation technology such as BizTalk, relational databases such as Oracle, SQL Server, or DB2, e-mail applications such as Outlook, and document management systems such as Hummingbird, Documentum, and SharePoint. BizFlow readily supports custom-built or vendor-provided native adapters for mainframe, legacy, and enterprise applications through the BizFlow Agent activity. BizFlow's event response adapter enables automatic initiation and completion of processes based on external events, such as a transferred file, database event, or HTTP request.

Q: How does BizFlow support the integration of people into automated processes?

A: As a business process executes, there are points at which decisions are made, expertise or practical thinking are required, judgments are made based on evaluation or analysis, manual intervention is required, and work is assigned. These activities involve people...even in automated processes. Integrating people into automated processes can introduce unacceptable latencies and errors, if not handled appropriately.

BizFlow provides a number of features designed to minimize the impact of human involvement, keeping processes on schedule. Within the user interface, for example, a process participant can immediately see the priority of work assigned to them. They can also see at a glance which items are overdue or due today. When users access a work item, they are presented with the appropriate information and forms to ensure that work is accomplished quickly and with minimal errors. For example, forms can be pre-populated with information from a database, reducing redundant data entry; automatic calculations, drop-down lists, and option boxes reduce errors; buttons and context-sensitive links can provide help at the time it is needed. Deadlines help people prioritize their work, with the ability to notify, forward or escalate work nearing or exceeding a deadline. Unlike systems that can operate 24/7, people are often not available to perform work assigned to them (e.g. sick, traveling, or on vacation). BizFlow provides the ability to designate someone or group to whom work will be sent when a user is out of the office. BizFlow's user interface can be accessed via the Internet or through wireless devices such as PDAs.

Q: Does BizFlow provide localization for different languages?

A: BizFlow is localized — including user interface customization, online help and manual translation, and data storage and display — for the following languages: English, French, German, Korean, Japanese, and Chinese.

Q: Does BizFlow provide monitoring tools to view process status?

A: BizFlow’s Process Monitoring tool and Monitoring BizCoves provide real-time depictions of a process in progress. Color-coded icons in the Process Monitoring tool show at a glance the status and execution path of a workflow at any point. Drill down into the graphical representation for detailed information showing “who, what, when, and where,” including attachments, comment threads, and more. Monitoring BizCoves present time-sensitive critical process details, such as total purchase price of an order in progress, expected and actual delivery date of a completed order, inventory levels, or any other user-defined process detail. Monitoring BizCoves present information in tabular format within web clips that plug easily into the BizFlow user interface and portal applications such as PlumTree, SharePoint, or custom-created portals.

Q: Does BizFlow support document management systems?

A: BizFlow provides version, access, and change control of documents involved in a process, such as engineering drawings, contracts, service agreements, project plans, and work instructions, through support for the systems that were designed and built for enterprise document management. BizFlow provides adapters for the following document management systems: Hummingbird EDMS, Lockheed Martin’s Formtek:Orion DocDomain, Documentum EDMS, and Microsoft SharePoint EDMS. For EDMS systems not listed, an EDMS adapter development kit is available, which contains code and documentation supporting custom development. BizFlow enables users to seamlessly log into a supported EDMS system and copy or link a document as a work item attachment. The Hummingbird adapter additionally supports document metadata, search capabilities, and integration with the applications supported by Hummingbird EDMS.

Q: Our enterprise will be — or has already — deployed applications within the .Net framework. Can BizFlow run in the .Net framework? Can BizFlow integrate .Net applications into automated processes?

A: While the engine itself is not deployable within the ADO.Net framework, BizFlow does support applications built within the .Net environment through support for Web Services standards through BizFlow’s extensible C++ and SOAP Application Programming Interfaces. Using BizFlow’s Agent activity in conjunction with XML and SOAP, .Net applications can easily be integrated as actors within a process model.

Q: Our enterprise will — or has already — deployed applications within a J2EE application server. Can BizFlow be deployed within a J2EE application server container? Can BizFlow integrate applications deployed as EJBs or servlets within a J2EE application server environment into automated processes?

A: While the engine itself is not deployable within the J2EE EJB container, BizFlow does support applications built within the J2EE environment through support for Java Servlets, Web Service standards, and through BizFlow’s extensible Java and SOAP Application Programming Interfaces. Using BizFlow’s Agent activity in conjunction with Java, XML, and/or SOAP, J2EE applications can easily be integrated as actors within a process model.

Q: Our enterprise has one or more enterprise application systems. How does BizFlow integrate such systems into automated processes?

A: BizFlow addresses the challenge of coordinating the flow of work and documents between stovepipe systems without extensive integration efforts. Using BizFlow and partner-provided adapters, connectors, and transformation tools, IT staff can quickly integrate many systems into business processes with minimal development effort. BizFlow has been integrated with

enterprise systems such as SAP, JD Edwards, and more through specialized system adapters. You may also choose to integrate your enterprise systems through messaging or EAI products. BizFlow provides adapters for IBM MQ Series, MS MQ, and BizTalk. Finally, BizFlow readily supports 3rd party and custom-built adapters for proprietary or other systems.

Q: What operating system platforms does BizFlow support?

A: BizFlow server can be deployed on Microsoft Windows NT and 2000 server platforms. BizFlow server can also be deployed on HP-UX, Solaris, and AIX operating systems. The BizFlow user interface runs on Microsoft Windows 98, NT, 2000, ME, and XP.

Q: How does BizFlow implement user management? Does BizFlow support LDAP?

A: BizFlow provides comprehensive user management and authentication services. User information is manually configured in a web-based administration environment or imported from an LDAP-compliant directory system, such as Active Directory or SunOne Directory Services. Users can be logically organized into multi-level roles, departments, and so forth through User Groups. With BizFlow 8.7, user groups are further organized into hierarchies, such as organizational units, cost approval centers, matrix project team structures, and so forth, providing multiple reporting or approval structures to suit different business situations.

If your organization already uses an LDAP-compliant directory service, BizFlow supports a partial or full import of user information into BizFlow. With BizFlow 8.7, authentication of users can be passed to the LDAP-compliant directory service, ensuring that passwords are maintained and secured in a single location.

Q: How does BizFlow implement security?

A: Business processes are the heart of your business and must be protected at all costs. BizFlow fully supports the latest, state-of-the-art security technologies. 128-bit SSL encryption protects data from unauthorized access. Support for Public Key Infrastructure, including digital signatures and certificates, means enterprises can extend collaboration beyond corporate firewalls at minimal risk. BizFlow is certified Entrust-ready. BizFlow supports single sign-on services such as Active Directory Services from Microsoft. Access to BizFlow functionality and folders is managed through a set of inheritable privileges granted at the individual, user group, and hierarchy levels. Object-level restrictions provide even more granular security controls. From a development perspective, check-in/check-out enforces configuration management policies, preventing two people from making changes to the same process model, application, user information, and so forth at the same time.

Q: What databases does BizFlow support?

A: BizFlow process-related data can be stored in SQL Server 2000, Oracle 8i, or DB2 relational databases.

Q: Does BizFlow support Web Service standards?

A: Yes. BizFlow provides a SOAP interface to the BizFlow engine, providing the ability to call BizFlow functionality securely via the web. Functionality available through the SOAP API is described through Web Services Description Language (WSDL) files. BizFlow data is XML.

Q: Does BizFlow provide an end-user user interface out-of-the-box?

A: Yes, though BizFlow also easily integrates with vendor and custom portal software. BizFlow provides an easy-to-customize Web interface that provides access to all BizFlow functionality, such as process modeling, user management, reporting, and more. Access to functionality can be configured on a user, user group, or hierarchy basis based on authority

groups. For example, departmental managers may have access to the Management area of the UI, while staff is restricted from the functionality, information, and reports within the management area. Similarly, system administrators may have access to server management-related functionality, while others will not. Through the user interface, general users can initiate processes, work on activities to which they've been assigned, run reports to which they have access, conduct sophisticated process and system information searches, and monitor processes in progress.

Q: Does BizFlow support our existing electronic and web documents or provide a tool to create new forms?

A: Yes. Forms provide the interface through which people read, write, and modify data in a process. BizFlow Forms Designer facilitates the creation of electronic documents, providing rapid development features such as electronic signature fields, calculation and database fields, script libraries, XML schema and process variable mapping, HTML rendering, and more. You are not limited to BizFlow Forms. BizFlow supports your existing electronic documents, such as those created in Word, Excel, or Adobe, as attachments or in their native format through an optional viewer that supports annotation, zoom, print, multi-page support, and more. BizFlow also supports web forms in HTML, JSP, and applet format.

Q: Can BizFlow support the automation and administration of our enterprise's mission-critical business processes? Can BizFlow provide a fail-safe execution environment for these processes?

A: When you trust your mission-critical business processes to a business process management platform, you expect reliability. BizFlow's scalability and performance has been proven in customer deployments and independent testing scenarios. In one realistic test situation, a single dual-processor server running the BizFlow Server, Web Server, and database handled more than 60,000 activities per hour and over 600 simultaneous users. Achieve almost unlimited scalability by adding additional processors or machines or by clustering servers.

Failover features in a clustered BizFlow server environment ensure that processes remain operational — eliminating data corruption and reducing data loss — even if one or more servers are not operational. In a global deployment with multiple clustered BizFlow environments, processes between sites can be configured to ensure integrity and automatically transfer operation to other servers, processes, or site locations in the event of a server failure. BizFlow also reliably handles network and other externally caused interruptions without data loss or corruption; processes continue to execute successfully once an environment is stabilized.

Q: What are BizCoves?

A: BizCoves provide a way to organize the user interface so that the most important information is logically organized at the top level. BizFlow supports the following types of BizCoves:

- Process initiation
- Work lists
- Report lists
- Reports
- Monitoring

Available in BizFlow 8.7 are Monitoring BizCoves, which display user-defined process instance or archive details, such as a customer order's "Expected Ship Date" and "Actual Ship Date." BizFlow 8.7 also introduces BizCove Filters, which can be applied at design or

run time to display, search, and/or view information fitting specified criteria (e.g. “View the status of orders placed this week”). BizCoves are portal-ready and can be easily embedded in portal products such as Plumtree, SharePoint, and more.

Q: *What kinds of reports does BizFlow provide? Does BizFlow support my external reporting packages?*

A: BizFlow’s reporting capabilities, coupled with its open data architecture, helps your organization:

- Capture the current cost of performing activities
- Target high cost activities
- Provide a context for establishing and monitoring performance measures
- Provide the link between activity modeling and economic analysis
- Forecast financial baselines

BizFlow supports Benchmarking, Status, Workload, Throughput Trend Analysis, and Ad-Hoc reporting capabilities, supporting diverse information needs — from executive level reporting to technical support troubleshooting. These reports categories provide point-and-click report generation wizards that produce adaptable ad-hoc, graphical, and data export capabilities through the web browser. Create custom graphical reports within BizFlow or export report and/or process metadata to Excel, RDBMS, or OLAP cubes for assimilation into advanced reporting tools, such as Crystal Reports. For each process instance, BizFlow archives a full audit trail of process data supporting historical reporting, benchmarking, trend analysis, and more.

Q: *Does BizFlow support wireless devices?*

A: Yes. BizFlow has been tested with Microsoft PC PDA 2002. BizFlow supports HTTP, data is XML and user interfaces are JSP, so cell phones and other devices that support Internet protocols can also be used to access BizFlow functionality.

Q: *Does BizFlow provide the ability to initiate processes automatically from another application?*

A: BizFlow’s Event Response Adapter supports automatic process initiation and completion of an activity or work item from a file, database, or HTTP event with no custom development required. This functionality can be used to auto-generate a process instance based on business rules regarding third party events or applications that do not require user input. BizFlow also provides extensive, documented Application Programming Interfaces for Java, C++, and SOAP through which developers can initiate processes from applications or services such as EJB, COM, or web services. This supports collaboration between systems.

Q: *How can BizFlow help with our organization’s Six Sigma initiatives?*

A: As a solution for a Six Sigma project, BizFlow can help reduce defects and cycle times, lower inventory levels, and enable higher efficiency and lower costs, ultimately leading to customer satisfaction, higher market share, and greater profits. Through the BizFlow Six Sigma Program (BSSP), HandySoft helps customers focus on zero defects, innovation, and 100 percent customer satisfaction. BizFlow’s graphical Process Designer enables enterprises to define consistent, predictable, “best practice” processes that instill customer confidence. BizFlow process variables and real-time reporting capabilities aid in the capture and measurement of customer-defined Critical to Quality (CTQ) attributes. Coupled with BizFlow’s extensive auditing and dynamic process refinement, users quickly reduce process variation and improve overall process consistency and predictability.

Q: What is new in BizFlow's 8.x series?

A: With BizFlow, HandySoft listened to usability feedback from our customers to generate a list of enhancements to existing functionality, expand platform and database support, and build in support for Visio wireless devices. We also consolidated the Process Designer, end user, and management user interfaces into a single Web-based user interface. New features and capabilities include:

- Process designer, end-user UI, and management tools have been consolidated into a **single, web-based user interface** providing access to all BizFlow functionality (based on user rights).
- **Event Response Adapter**, which enables BizFlow to initiate or complete activities based on external events such as a file transfer, database, and HTTP request or posting.
- **Ad-Hoc routing**, including configurable designer features and run-time features; provides the ability to dynamically select a recipient at run-time.
- **Wireless support** with tested integration with MS Pocket PC PDA 2002 and BizCove display optimized for the smaller screen format of PDAs
- Improved and immediate visibility into BizFlow business process details with the addition of **BizCove Monitors**, which display process information, such as order status, expected and actual ship dates, and so forth. BizCoves provide users with easily configured, web and portal-ready work environments tailored to individual user or user group needs. Other types of BizCoves include Work List, Process List, Report List, and Report BizCoves.
- **BizCove Filters** give users more granular control over the information displayed in a BizCove through criteria filters such as date ranges, process variable parameters, process initiator, and more.
- **Language localization**, supporting English, French, German, Japanese, Korean, and Chinese
- **LDAP support** to include import of nested hierarchical user information in directories such as Active Directory and SunOne Directory Server. BizFlow 8.7 provides directory server authentication to ensure that passwords remain protected and stored in a single location.
- **Hierarchies**, which make it easy to route work based on multiple reporting and approval structures suiting different business situation; hierarchies mimic the hierarchical structure of LDAP-compliant directories for easy import.
- **Visio** basic shape import into Process Designer to speed the creation of process models within BizFlow
- **Support for DB2 as an object repository, AIX operating system**, and Tomcat, WebLogic, and WebSphere Web servers

Users upgrading from prior versions of BizFlow will notice enhanced:

- **Reporting and analysis** capabilities, supporting the export of BizFlow data to Excel, Crystal Reports, and OLAP reporting tools and the ability to view external reports within BizCoves (e.g. Excel or Crystal Reports graphs and reports).
- **Forms Designer development and rendering** features, including script libraries, enhanced XML mapping to/from external systems, calculation, database, and signature fields, and the ability to render forms in HTML.
- **Search** capabilities, including the ability to search by process variable in addition to a broad variety of other search parameters for rapid, comprehensive information retrieval.

- **Integration with MS Project**, with synchronization of data between MS Project and BizFlow, expanded import of MS Project data such as task finish date, escalation and alerts, additional routing rules, and BizFlow packaged forms for reporting time and expense values to update MS Project.
- **Adapter support**, with advanced features implemented for the Hummingbird adapter to support document metadata and the integration of applications supported by Hummingbird EDMS. **EDMS Adapter Development Kit** includes code and documentation to create custom adapters to unsupported document management systems.
- **Import/Export**, providing smooth transition of process models, user information, and BizCove configurations from development to test to production server environments.