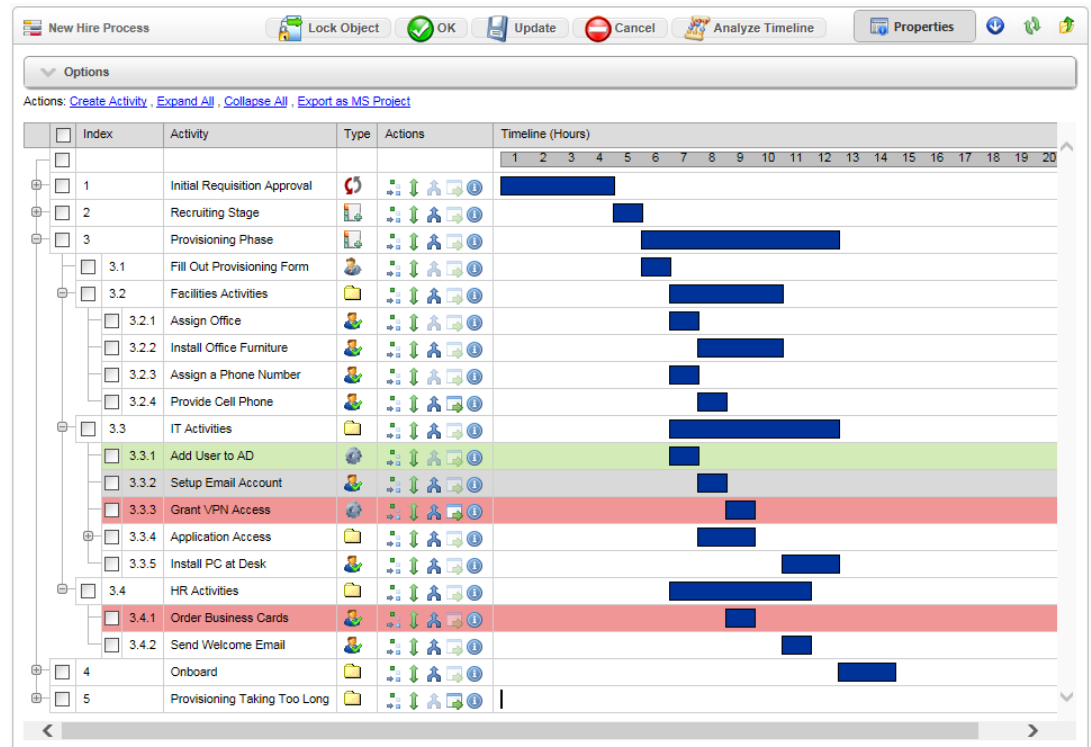# BP Logix Process Director 4.0

Recently the BPM.com team was provided with a comprehensive demonstration of the latest release, version 4.0, of *Process Director* from *BP Logix*. Previously we had the opportunity to explore *Process Director* 3.0 and also have worked independently with several BP Logix customers. Given this lens on the evolution of Process Director, *today recognized by analysts as one of the top tier market leaders*, we have a unique appreciation for both its current capabilities and differentiating features, as well as a unique appreciation of the critical milestones presented with this release.

What continues to set Process Director apart from its BPM and Case Management software competitors is the Process Timeline™ — an executable process model that presents a Gantt chart oriented notation. The Process Timeline captures time as a formal process dimension in ways not possible with other models. For example, although both BPMN and CMMN support "timer" events for setting deadlines and triggers, what they cannot do is capture – in any formal way – either elapsed time nor anticipated impact on completion time resulting from unplanned events.

About This Document:

This BPM.com First Impression examines the new capabilities presented in the latest release of *BP Logix Process Director*, a BPMS industry leader recognized by Gartner, Inc. in the "Magic Quadrant for Intelligent Business Process Management Suites 2015," with unique capabilities for both Case Management and traditional BPM patterns.

Process Director 4.0 Process Timeline

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BPM in its traditional form is concerned with time-based flows, sequence flow and control flow – knowing what to do next when the current activity has been completed and who to pass control to. Case Management is not driven by sequence but process, rules and data – driving the completion of the case based on the data captured within it (the case) and rules which apply.   Yet while time is a necessary and inevitable dimension of the case data (expressed in deadlines, dates, ages, etc.), the "critical path" concept offered by the Process Timeline is absent from nearly all case management frameworks. This absence is unfortunate, given the fundamental importance that these dimensions play to the vast majority of case management use cases.

ARCHITECTED FOR CASE MANAGEMENT

Process Director in general, and in particular the Process Timeline capability, were already oriented around case-style work. This is the case from not only a functionality standpoint, but also the core design of the product. A measure of this is reflected in the changes to the architecture of Process Director in the 4.0 release, which required BP Logix only to create one new object (the case definition itself) to provide a formalized Case Management Framework. The rest simply represents the way Process Director has always worked.

The subtlety of that fact belies its significance. There is no question there is a renaissance underway in the market for Case Management. At BPM.com, and as reported by other analysts, we see more BPM investments made to obtain case-handling capabilities than any other use case. These buyers are not simply looking for folder-handling systems, or what had been labeled "Case Management" for 20 years. They're looking for solutions that pull together process, data, and rules to respond expeditiously to business events, working toward not simply timers but time-based goals.

It is entirely fair to say that in many ways and areas of capability, market expectations have evolved in the direction where Process Director has already been. This is certainly visible with Process Timeline, which beyond the time-based dimension supports the multimodal run-time patterns required for Case Management, combining sequential flow style with both event-driven and time-driven execution, as well as checklists and ad hoc activities.

Similar to the value of the time-based dimension, the event-driven aspect is the foundation to supporting Case Management. A case is not simply a container like a document folder, but a framework for responding to events based on all the dimensions of the case, including time. An event occurs, a case file is opened, and then the end point is known. The circumstances, which define how and when the case is completed is known, but the means to reach that is not predetermined.

This same event-driven model is found within Process Timeline, where each segment and every activity is launched only when the specified set of conditions required for its execution have been met. A series of activities will occur, information will be created and added to the case, and as that information and the context around it is added to the case, that's what determines the state of the case ultimately. It is only when that goal is reached that the case is completed.

Within any case there may be any number of processes that are kicked off at a given time, happening in parallel or sequentially, yet the sequence for those activities often cannot be predetermined or hardwired into the process. Given this, how do you know where you are in the state of the case? How much longer will the case take to be completed and what compensating steps or remedial actions need to be launched at any given time? With procedural workflow, there is no way to tell. This is why the time-based analysis provided with the Process Timeline lends itself so readily to Case Management and case-driven business applications.
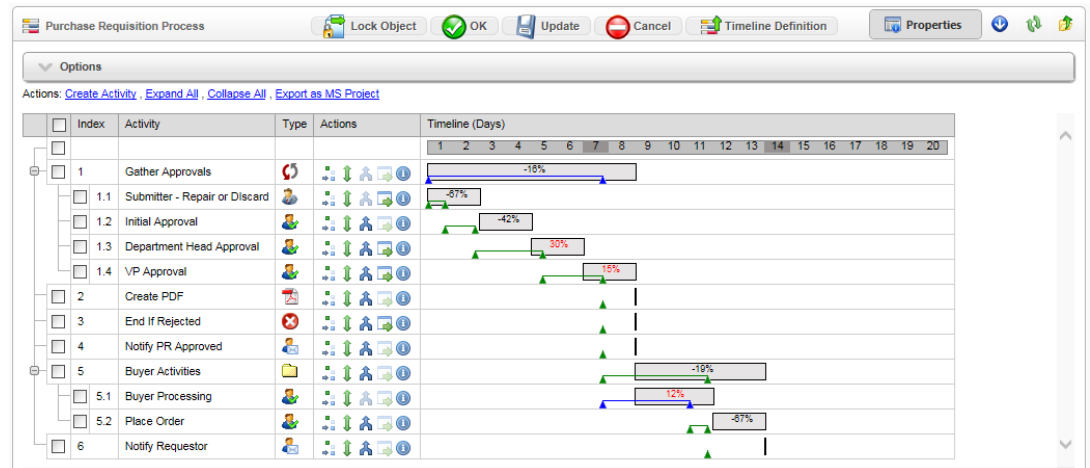
Time-based Analysis of Event Impacts Within Process Timeline

## ADDITIONAL ENHANCEMENTS TO PROCESS DIRECTOR 4.0

For not only the current release but also prior releases, the out-of-the-box benefits and capabilities offered by *Process Director* include:

- "Low Code" or arguably "No Code" development modeling favoring configuring over compiling, along with the ability to combine both traditional sequence and control flow with time-based dependencies within the definition of workflows.

- Parallel cloud and on-premise deployment options using the same codebase.

- Tight integration and leverage of Microsoft infrastructure and environments including SharePoint, as well as persona-based workspaces and rich UI creation using a browser-based form designer.

- User-centric alerts and notifications that enable actionable, closed-loop communication with process participants about status and events, including predicted impact on pending deadlines and dependencies.

- Rich graphical reporting and report-writing capabilities allowing for building executive dashboards and defining KPIs.

- Integration with social media platforms such as Twitter, Facebook, LinkedIn, and similar platforms, enabling direct-to-customer process interaction, as well as event-listeners for launching processes in response to social network events.

With this latest release Process Director sees various enhancements of its capabilities. This includes expanding on its unified modeling and execution platform with the addition of *goal-driven actions* and a *data virtualization layer*, as well as enhanced dashboards and UX improvements.

Data Virtualization Layer

Process Director 4.0 introduces a rule-driven data virtualization layer and lightweight ETL capability with a function called "Business Values." These provide a straightforward method to create reusable access points for business data, but also allows for the definition of access controls.
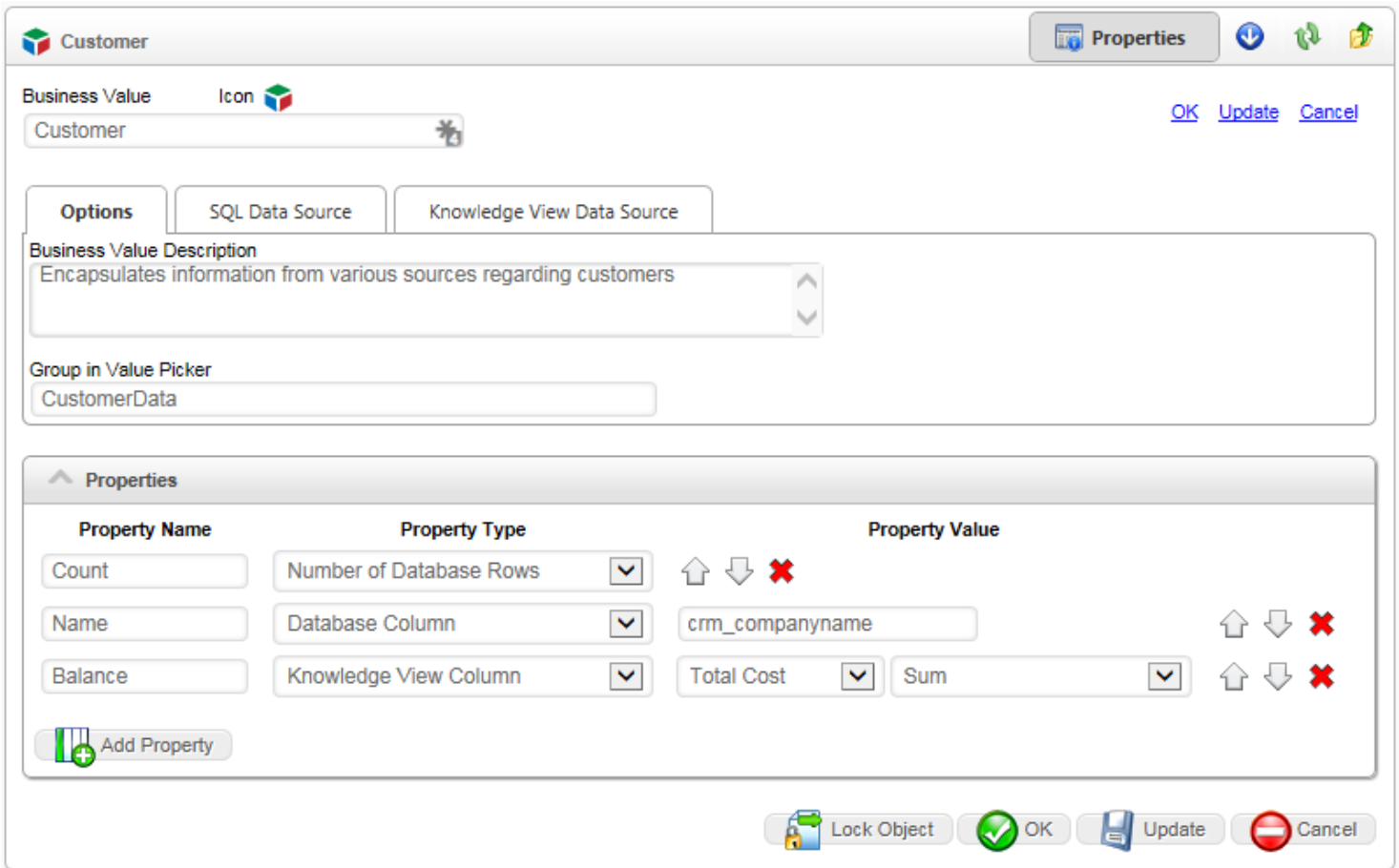
Process Director 4.0 Business Value Configuration

Goal-Driven Actions

Goal-driven actions can be defined at either global, system-wide levels or down to the activity, which drive priority, state and context, and/or trigger activities and responses. They can launch specific actions, change the behavior of in-flight processes, or be linked with event listeners that serve as the "nerve endings" of the case to receive and respond to external events (transactional events or truly external events such as activity within social media channels). A common use case for a goal-driven action would be to send notifications and/or immediately delay or cancel pending transactions if the company's risk profile exceeds a certain threshold.

RULES-DRIVEN, PERSON-BASED USER ENVIRONMENT

Process Director presents a distinctive User-Centric Design (UCD) metaphor with a responsive work environment able to adapt based on individual users' roles, process state, and access device/platform. Combined with extensive reporting/dashboarding capabilities, contextual alerts/notifications and integration with third-party social media platforms, this allows *Process Director* to deliver a very rich user experience (UX) linked to business rules, roles, and individually defined preferences.

Process Director includes a lightweight portal environment so that rich web applications can be built and deployed "out of the box." Otherwise capabilities can be exposed as *SharePoint WebParts* or as web-based portlets. User authentication can done locally (i.e., as users defined within *Process Director*) but more notably can also use Active Directory or external LDAP services via standard protocols such as *SAML, ADFS (Active Directory Federation Services)*, and *OAuth*. This enables single sign-on (SSO) within protected environments (e.g., "within the firewall") as well as external social platforms, such as *Twitter* or *Facebook* as mentioned previously.

Typically, however, new processes are launched from within a form or in response to an event, such as new a 'ticket' submission, customer inquiry or a specific form submission such as a Purchase Order or Travel Request. *Process Director* offers both a complete form designer as well as an event listener within the process design palette. The event listener allows for the definition of triggers for launching a process or otherwise initiating a process-based activity, resulting essentially from any machine-based event. For example, an application receiving an email directly from a user or from a web page, a newly scanned document being added to a repository, or an application generated alert.

User interaction within the launched process can range from selecting a task from a task list, responding within a dynamic form, or otherwise responding to a direct alert. The forms designer allows for mirroring any existing environment, such as mimicking a literal paper form or otherwise following an e-form metaphor, as well as building a complete Rich Internet App (RIA) interface. In all cases, however, the presentation environment is driven by the underlying rules and context of the process.

ENVIRONMENT AND SYSTEM REQUIREMENTS

Process Director's declarative, configuration-based (i.e., "codeless") design-time environment allows all process definitions (as well as rules, goals, cases, reports, and other Process Director objects) to be built within a standard Web browser. No client software or plug-ins are required, and Process Director can be accessed by any client browser (all leading browsers/client-platforms are supported) including tablets and mobile devices. Process Director eForms are created using Microsoft Word for layout, with dynamic behaviors and logic added using the browser-based UI.

For on-premise deployment, *Process Director eForm Builder* requires just the .NET Framework 2.0 plus Microsoft Word 2003 or higher, and Process Director Server requires a standard Windows Server configuration:

- Microsoft Windows Server 2008 R2 or higher

- Microsoft SQL Server 2012 or higher, Oracle 11g or higher

- .NET Framework 4.5 (server)

CONCLUSION

Process Director is a competitive BPM offering that happens to be well-aligned with what we're now calling "Case Management"- yet also uniquely addresses the dimension of time with capabilities that are absent from its competitors.

Just as time progresses without restraint, the case evolves **with or without you** - and whether or not the case is formally managed within a case management system. Documents arrive, customers make decisions, motions are filed, and the case evolves accordingly. Although it is true that case management is driven by human decision-making that is found (or allowed) with traditional workflow, this does not remove the need for accommodating process automation in either scenario. To the contrary, one of the most fundamental requirements for effective case management is the ability to automatically adapt and respond to incoming events. Yet beyond the efficiency benefits of automation, it is, foremost about the critical keeping pace with conditions and context as they evolve over time.

Process Director allows the element of time to be captured within the case using a specific variant of BPM technology that is intrinsically sensitive to time. Process Timeline activities are event- and goal-driven, actively waiting to get started, awaiting only the satisfaction of the conditions specified for its execution. Event listeners receive and respond to external events, including predefined, transactional events, as well as truly external events such as activity within social media channels.

As the case evolves over time, the coordination of all of the associated and supporting processes and process snippets that comprise the case must similarly keep pace and reflect the changes which occur as time passes. By simultaneously supporting both timeline and critical-path awareness, Process Director is able to blend process management with project management with a flexible process architecture that supports both procedural automation and in-flight adaptation.

For more information visit: http://www.bplogix.com/

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