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## First Impressions in Lean BPM: Integrify 5.2

Lean BPM is distinguished from today's consolidating group of "stack" or platform vendors in its focus on the quick deployment of process-driven applications (such as purpose-built forms and web apps) rather than broad-reaching system modernization and integration efforts. The latter typically involves project lifecycles of several months, and often 100s or even 1,000s of vertically-integrated function points. In contrast, Lean BPM can be applied to targeted areas to realize immediate benefit, without imposing the deployment overhead and integration effort involved with those environments.

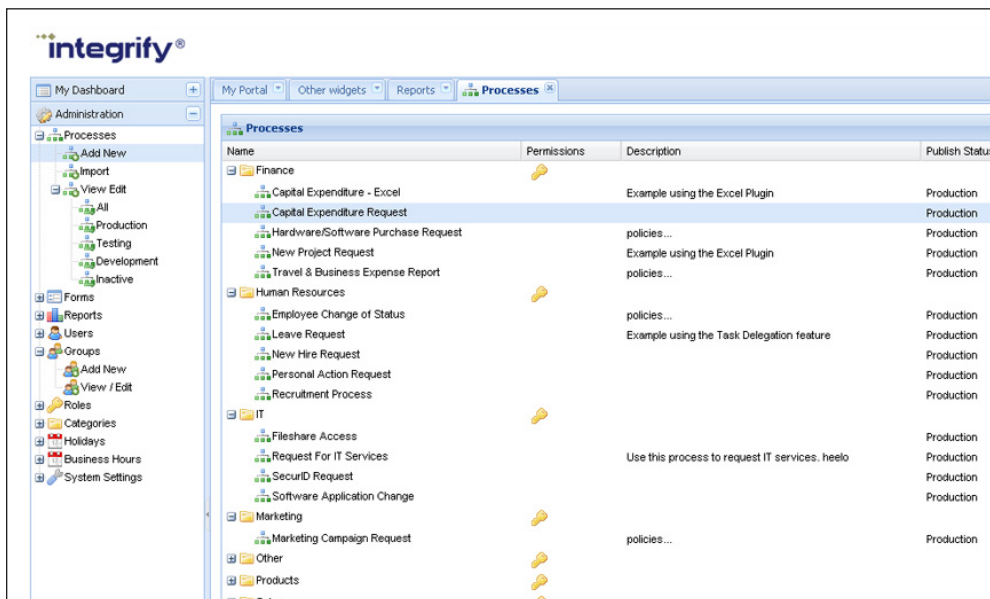
process interaction – making the process visible and accessible to business stakeholders. Typically Lean BPM leverages Web 2.0 type functionality for intuitive/business-friendly graphical reporting and lightweight integration or "mash-up" capabilities, such as using the RESTful services (rather than SOAP messaging or RMI based integration.)

A leading example of Lean BPM is Integrify (currently in version 5.2) from Integrify Software, Inc. BPM.com recently had the opportunity to evaluate Integrify and found it to be a compelling example of what distinguishes Lean BPM from "stack" oriented BPM platforms, as well as from lightweight "workflow on the web" tools which may offer basic forms routing but lack the state management, transactionality, integration framework or other extensibility required of authentic BPM (and found in Integrify.)

The Integrify platform features a 100% Web-based Administrator console and development environment with a design metaphor that will be familiar to any Web developer or admin, and that allows for fully "codeless," declarative programming (or perhaps more appropriately "composition") of all BPM functionality. This includes an integrated forms designer and UI builder, report writer, plus the requisite process modeling environment, business rule editor, and integration framework expected of any fully featured BPM solution. The platform also includes, however, a specific set of library management functionality for managing portfolios of process models and reusable resource components, such as users, roles, reports, forms, and business-related configurations including calendars, organization structure, permissions, as well as system settings.

One of the traditional challenges with BPM development is managing multiple environments for Development, Testing, Production, etc. Within its Web-based deployment and Administration

Figure 1: Integrify's Web-based Admin Console and Library Services

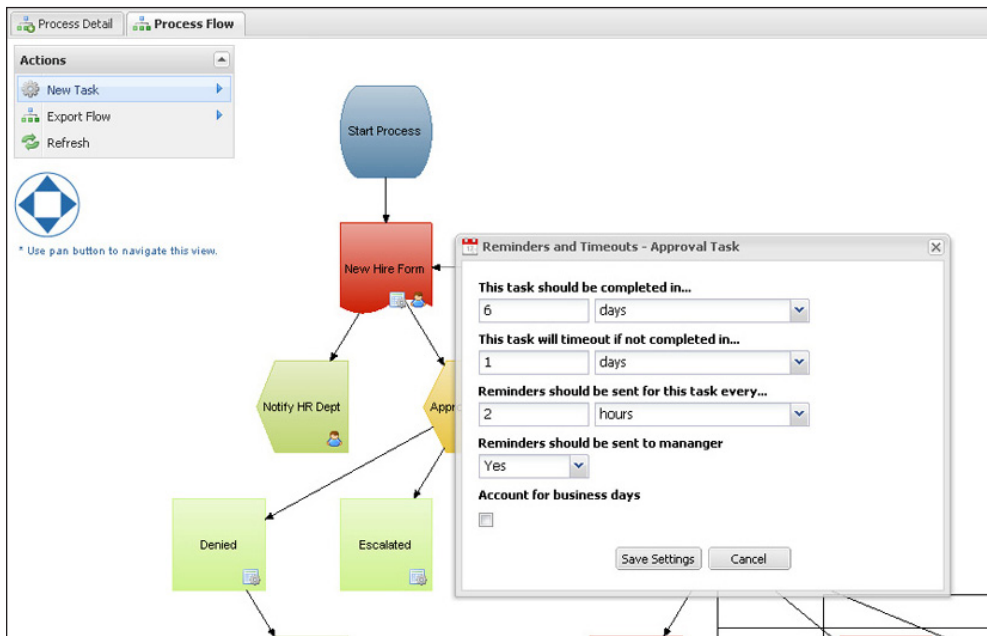


The goal of Lean BPM is to rapidly deliver process-driven functionality, ideally as successive proof-points to build on and grow capabilities horizontally, leveraging the existing environment and infrastructure. Lean BPM supports an agile orientation of transforming through use, following a Deploy-Measure-Improve-Modify model, rather than the older (yet still too common) waterfall approach of significant upfront analysis, modeling and re-engineering before any BPM functionality can be deployed. Lean BPM focuses on enabling change through

environment, Integrify provides built-in publishing controls to management migration from "Development" to "Testing" to "Production." This enables support for functional and non-functional testing, as well as selected deployment to limited sets of users prior to full production rollout. Built-in process versioning also supports iterative improvements and changes, allowing all or part of a process to be copied and "templated" for the creation a new process, or to be reused as a subprocess.

It is worth noting that the process modeling and task flow designer is based on a common flowcharting notation rather than BPMN. This is consistent with the Lean BPM principal of making process development as accessible (and productive) as possible. Although BPMN offers a standard modeling notation, which can very useful for large, distributed programming projects involving complex business analysis and requirements gathering, this complexity comes with a steep learning curve. For rapid development of process-driven applications, particularly by non-programmers, what is inevitably more useful is the simpler flowchart metaphor combined with wizard-driven configuration ability of process attributes, such as routing, rules and task definition. Figure 2 is the model that Integrify follows.

**Figure 2: Integrify's Web-based Process Modeling Environment**



Although Integrify does not provide (and thus does not require knowledge of) the notational semantics

involved with BPMN, it does support the common syntax expected of BPM modeling. This includes parallel and sequential flow logic, parent/child process hierarchy (e.g., control flow within subprocesses) as well as more complex conditions outside the realm of BPMN, such as the concept of business hours, rich email-based notification, task delegation between users (maintaining the chain of custody) and task scheduling (e.g., scheduling tasks to kick off at a specified time.)

Integrify supports a complex set of Human-Human and Human-System interactions, which can be defined as either User Activity type tasks or Scripted tasks involved Web Services calls or direct database calls. Scripted tasks can instantiate processes, complete tasks or perform any other action within Integrify. This includes support for

relatively complex business logic and form-resident functionality such as populating a PDF form with data in- process data and/or generating a new PDF document; line item calculations within forms; add conditional approval with comments when completing an Approval task; as well as to guide users with context-sensitive links to documentation supporting the current task being completed.

Integrify also provides for an adapter architecture that (similar to the Web Services innovations described above) enables in-process/bi-directional integration with external systems, called "Plugin Extensions." Plugins provide reusable, encapsulated logic (either as an automated activity or human task) for programmatic functions such as integration with external systems (including data Excel), interacting with internal systems, as well as extracting data for executing against a rules engine to determine conditional routing directions.

In addition to leveraging Web Services within an Integrify process, an externally accessible Web Services layer allows of for other systems to launch Integrify-specific functions. The published services include instantiating a process, retrieving a task list or completing a task, updating process status, or performing a task with bi-directional data exchange. Again, any data passed through the process can be exposed to the rules engine for determining calculations, such as routing direction.

As illustrated through the previously described capabilities, Integrify is built on a Service-Oriented Architecture which specifically leverages RESTful Web Services, exposing all process functionality to the Integrify REST API, as well as the Integrify JavaScript API, which combined with AJAX support

allows for rich interaction to be embedded within external applications and web pages as packaged components called “Widgets.”

Widgets can be data-driven, such as dashboard components including calculations and KPIs, or other functionality such as launching a process or accessing a task list. This also allows Integrify to integrate into Microsoft SharePoint, by displaying Integrify widgets into an existing SharePoint site, or by adding a document to a SharePoint repository.

### Company Background

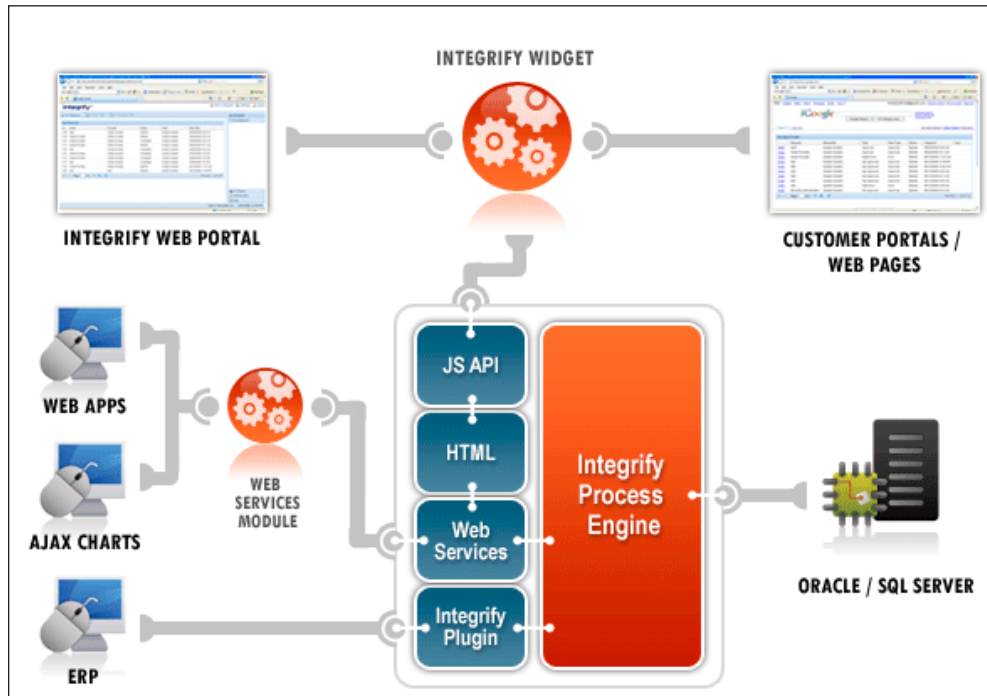
Launched in 2001, Chicago-based Integrify is among the more widely adopted BPM platforms, with an installed base of over 200 customers and 200,000 unique users. Customers include many Fortune 500© firms and well-known brands such as Morgan Stanley, BP, Staples, Deloitte and GlaxoSmithKline.

One notable recent customer is the Panda Restaurant Group, Inc. one of the largest family owned firms in the U.S., as well as the largest and fastest growing Asian restaurant company in the country.

What is particularly noteworthy about the PRG is that they have won worldwide acclaim as “rollout” leaders. Specifically, they have successfully competed and aggressively grown on their ability to optimize the process for rolling new stores, with 175 planned to be opened in 2011. This requires a both a sophisticated approach to process management, but more specifically the ability to quickly adapt work models by managing a tight feedback loop with user types not typically IT-oriented – restaurant workers and managers. As explained by said PRG’s Director of Information Systems Alan Cheung, “We chose the Integrify system because it is intuitive and very easy to use with a graphical interface that will allow us to track all the activities in our processes. In 3 to 6 months we anticipate that everyone will be following the same process, which keep us in step. By the end of the year, we’ll be able to look back and review the process and see where we can make further improvements on it.”

Integrify can be deployed either “OnPremise” running on a Windows platform with either a Oracle or SQL Server database. Alternatively, as Panda Restaurant Group is doing, it can be run “OnDemand” with all of the functionality of the OnPremise solution in a Cloud model.

Figure 3: Integrify’s System Architecture



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