



WHITE PAPER

Business Process Automation

A Gateway to Better Business Management

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INTRODUCTION

Today's economy requires that businesses take a practical approach to managing productivity and costs. The mandate is to optimize efficient processes throughout the organization. In the ongoing search to improve productivity, many companies are looking at Business Process Management (BPM) as a means to increase productivity and extend system functionality without requiring rewrites of corporate policies and procedures.

THE BPM/BPA ADVANTAGES

BPM details how a business operates by analyzing the roles of personnel, areas of business and processes. Business Process Automation (BPA) goes one step further by automating various aspects of those roles, areas and processes to ensure consistent and repeatable performance.

An important side benefit of BPA comes from capturing and preserving the business function knowledge of key individuals. This repository of business knowledge rewards organizations with increased productivity, a better understanding of the company's structure and formalized procedures that stay with the company even if process-founding workers leave.

BPM helps an organization focus on acquiring, storing and utilizing knowledge for such things as problem solving, dynamic learning, strategic planning and decision-making. As well, it protects intellectual assets from decay, adding to an organization's overall intelligence and providing increased flexibility.

Using BPM to automate activities also helps to monitor the progress or bottlenecks of a company. Once implemented, automated business processes can assist in the training of new employees, or provide a standardization of processes internally for use with the organization's customers and/or suppliers. To begin developing business process workflows, an organization needs to analyze how it works and what its people know and identify areas for improvement. Many organizations discover these areas as a process of continuous analysis, but as a general rule BPA has the greatest economic impact in situations where:

- Processes are currently managed via paper forms that are physically moved around the organization
- Multiple employees or teams of employees are collaborating on a single document or unit of work
- Approval steps are numerous and business critical

Once the organization identifies an ideal area to be automated, the next step is implementation.

ABOUT THE PROJECT

As with any project, selecting the right team members to create a BPA solution is crucial to its success. Along with the IT personnel needed to design, develop and deploy an automated process, a workflow solution team should include one or two information workers (also known as Subject Matter Experts), a business analyst, business manager and technical writer.

As the process requirements are defined, the IT professional will consider whether to build a custom solution or purchase an existing BPM solution. The benefit of a custom solution is its flexibility and customization attributes. The downside is that the IT team will be responsible for the maintenance of the custom solution and code base. Internal development will also require significant resource commitments of time, equipment and expertise.

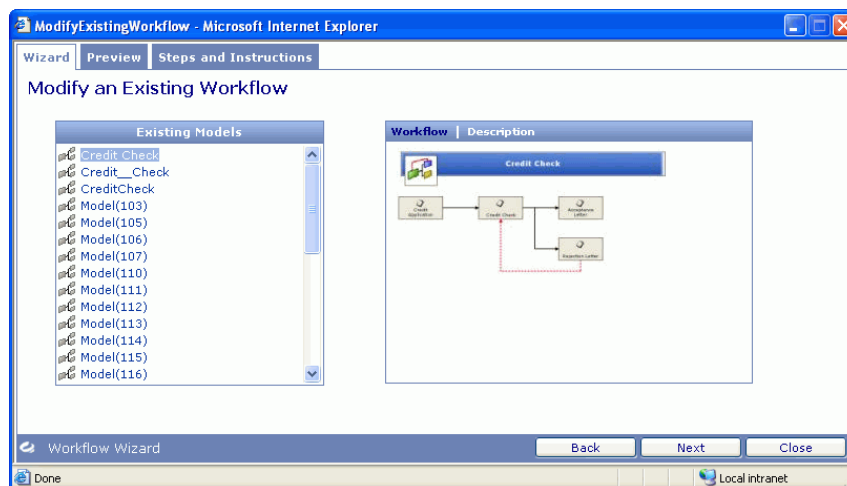
If the choice is to purchase a BPM solution, it is important that the organization is clear about the cost and anticipated return on its investment. In addition, the team, including (potentially) the BPM vendor, needs to agree on projected deployment dates. In either case, the quicker a workflow solution is made available, the sooner an organization will realize increased productivity, efficiency and cost savings.

With time and budget concerns in mind, companies will often opt to purchase BPM engines as they typically shorten development and deployment cycles. Many tools associated with a BPM engine's functions capture, model, implement and manage the components and activities of a business through the use of graphical process design, database access, document assembly, email integration and other features such as integration with other systems and devices. There are some important points to consider when purchasing a BPM tool:

- Integration with other systems
- Security
- Service support
- Flexibility
- Scalability

A good BPM solution should provide wizards or an exposed Application Program Interface (API) for integration in order to easily integrate with existing applications used in an office. Wizards can even be used to enable information workers and non-technical staff to build and deploy rudimentary workflows. Software engineers and designers can then expand upon the capabilities provided by the wizard built workflow.

Figure 1: Captaris Workflow Wizard, powered by Teemplate



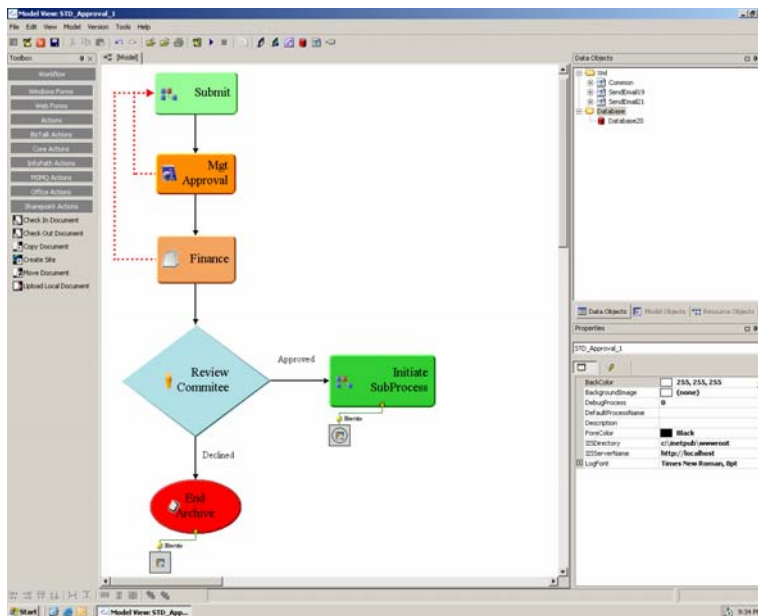
Scalability should be considered not only for the current number of users but with consideration to the number of future users that will be added as additional workflow solutions are deployed. Other factors, such as security, device support and flexibility, are dependent on the actual deployment. If the workflow solution is strictly internal, it will have different specifications and requirements than one that is Web-based. The organization may start with one automated process for a single department that initially resides within a firewall. Once completed, it could be expanded to include additional groups and then extended beyond the firewall.

ABOUT WEB SERVICES

Web services are being rapidly adopted as part of workflow solutions. As organizations move towards automated workflow across departments, they need a system to connect contrasting applications and unrelated platforms. Web services access APIs in order to allow applications to share information. For example, using Web services a developer creates a purchase order workflow that provides live information on the shipping status by incorporating a "Web service" provided by a shipping company. (The implementation may be done through a wizard-based interface). If the shipping firm provides the information via a Web service, the information can be accessed and presented automatically and dynamically in the workflow solution. The end-users become more efficient as their time is now spent on completing tasks rather than looking for information (like shipping status). Another example would be a developer using Web services who creates a workflow solution that monitors inventory levels as orders are processed. When the inventory falls below a set level, workflow is automatically triggered to send an order to a supplier. Using XML and Web services, the supplier acknowledges the request and processes the shipment without the need for further human intervention. In essence, Web services allow developers to build workflow with a common language, platform and protocol. Coupled with .NET, this gives a workflow solution the ability to:

- Manage the process itself, which in turn manages people, relationships and what they do
- Deal with various applications on disparate platforms
- Provide the end-user with dynamic data updates

Figure 2: Workflow Model within the Captaris Workflow IDE



ABOUT MICROSOFT .NET

The Microsoft .NET framework is being adopted by organizations as a means to connect systems and improve the flow of information. This framework makes it easier for companies to share and integrate existing systems and information as well as extend functionality by using XML and Web services. As organizations move forward, they will find that information sharing is fundamental to automating a process across platforms and departments or groups. As a business grows, it consistently adds to the processes and the number of systems it uses. When you consider building workflow solutions, an important point to consider is that .NET provides an ideal platform for interoperability and information sharing. With .NET, passing data from one system to the next becomes seamless and requires minimal programmatic manipulation. Just as the .NET framework provides organizations with the ability to link systems beyond a company's walls by providing users with Web and wireless-based computing, XML and Web services enable systems and devices to connect and interoperate with one another. XML is not only used as a mechanism to pass data from system to system within an organization, but also from business to business. These technologies help automate workflow by leveraging interoperability and ensuring that a user does not have to be in proximity to the central enterprise to complete tasks. Workers can be anywhere in the world, using the Internet to complete work. Certain BPM engines also support wireless devices like PDAs.

REPORTING BEST PRACTICES

Since an important element in setting up a workflow process is the selection of the correct BPM tool, organizations should further consider what that tool will provide. It is important that organizations select a tool that provides the ability to model the process as well as to integrate the technology. Workflow solutions should incorporate reporting and monitoring capabilities. Management will require at-a-glance reporting. Even better, these reports should be easily exported to other technologies, such as Microsoft Excel.

THE BENEFITS

Initially, as with any project, implementing workflow solutions is not without its growing pains; however, the benefits are numerous. Organizations point out that BPM/BPA has helped in the automation of administrative tasks as well as reducing the costs of transactions or business events. These solutions have also improved coordination of activities and information/knowledge sharing across departments and locations.

Once processes have been modeled and therefore automated, organizations have also been able to reduce the number of tasks required in a process or the number of users needed to complete a transaction. By eliminating redundancies, efficiency and productivity are increased. This means quality improvement, fewer errors, higher productivity per person, as well as a reduction in the time required to complete a process. The likelihood of "something falling through the cracks" is greatly diminished.

CONCLUSION

BPM is not just a matter of decreasing or refining the number of tasks to complete a process. It is a business transformation project. It is a way of implementing new technology and tools, reutilizing existing systems and leveraging the human factor to help evolve an organization as a more successful business.

FOR MORE INFORMATION

Captaris Business Information Delivery solutions capture, process, archive and deliver data and documents enabling customers to reduce costs and increase the performance of critical business information investments. Through its global distribution network, Captaris delivers cost-effective software products and services that help organizations manage and leverage the value of corporate information. In partnership with leading enterprise technology companies, Captaris has installed more than 90,000 systems in 95 countries in companies of all sizes, including the entire Fortune 100. For more information please contact us at www.Captaris.com or +1.520.320.7000.

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