

Business Entities:

An Artifact-Centric Approach for Business Process Management

Terry Heath - Senior Software Engineer IBM T.J. Watson Research Center December 1st-16th 2009 Università di Roma "La Sapienza"

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Overview of Lectures

Lecture #1

- Artifact-Centric Approach
- Comparison of Business Process Management Approaches
- Brief introduction to Siena
- Siena Demo

Lecture #2

- Review Siena Meta model
- Review Siena Hotel Example (Deep Dive)
- Install Siena

Lecture #3

- External Service Integration (REST and WSDL)
- More Siena Examples (Patrizia and Alessio)
- How to use Siena
- Possible Homework Assignment

Lecture #4

- Review homework
- Artifact Design Patterns
- Open issues for Siena system
- Future Artifact Designs

Lecture #1

- Artifact-Centric Approach
 - Introduction to Business Entities
- Comparison of Business Process Management Approaches
 - Process-Centric approach using Hotel Scenario
 - Artifact-Centric approach using Hotel Scenario

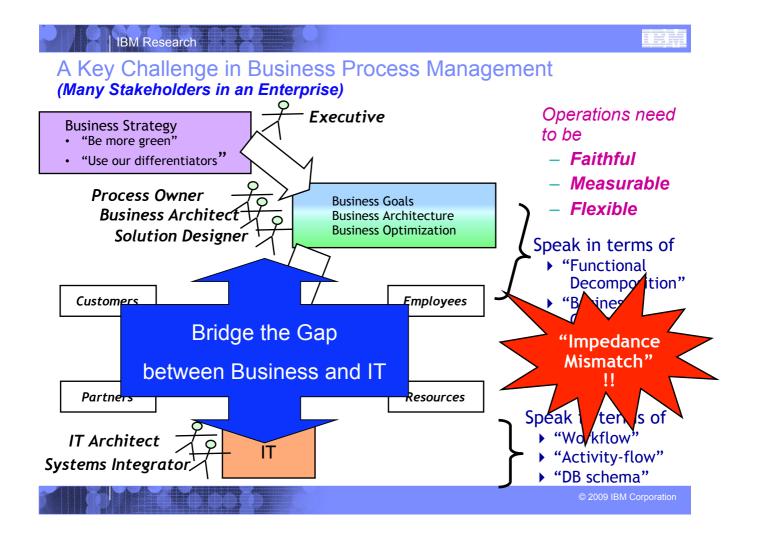
Brief introduction to Siena

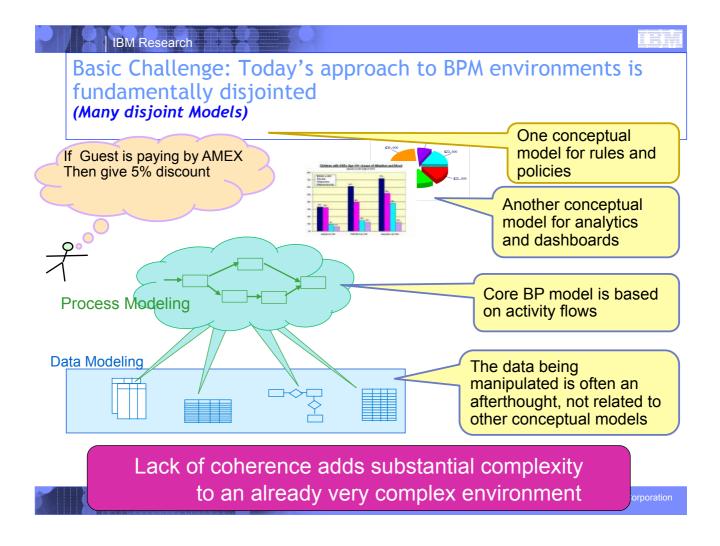
- Overview
- Architecture

Siena Demo

- Review Hotel example







"Business Entities": data + process combined to form a new, "holistic" foundation for BPM

Business Entities are Unifying Business Constructs

- Provides a skeleton that cuts across the Business
 - e.g., Guest Stay
 - From CheckIn to CheckOut
 - Blending of Data, Rules, Process, Measurements in the context of a Guest Stay

Includes specification of both

- The *information model*, to hold relevant data about an artifact as it moves through the workflow, and
- The **possible lifecycles** it might follow
- *Insight:* Gives business managers a unified, end-to-end view of their business operations
- **Communication:** Numerous stakeholders have a common basis for understanding
- Actionable: Natural mapping to organization & IT levels

Brief comparison of BPM approaches

Process-Centric Approach Artifact-Centric Approach Business Data is Business Data is -The **PRIMARY** focus -NOT the primary focus -Business data is merely an after thought Process Steps are the main Process steps occur in context concern -The "Business Entity" needs which humans to do something to it. -What do humans do in the business -The "Business Entity" needs to -What systems need to be integrated integrate with what certain systems.

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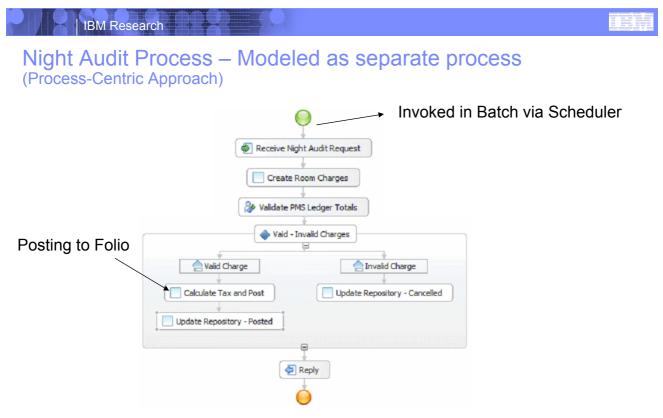
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Review of Hotel Scenario for comparison

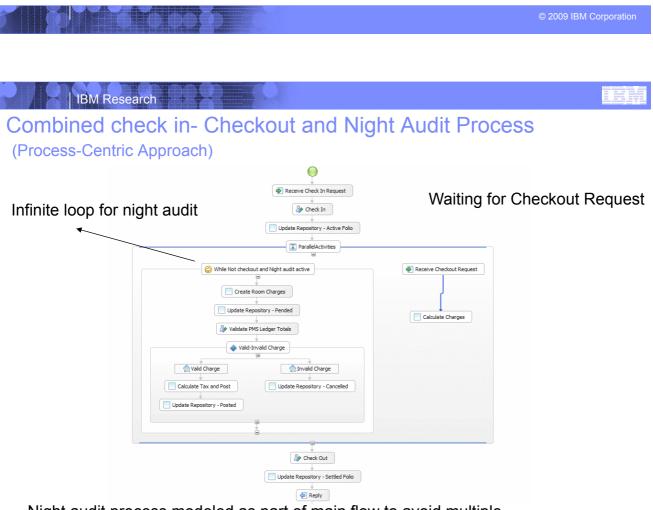
- Posting charges to the guest folio during a hotel stay
- Base scenario
 - -Guest checks in
 - -Room charges are posted by the Night Audit process
 - -Guest dines in the hotel restaurant
 - -Guest checks out
- Scenario evolution 1 Handling of "lost" charges
 - -Guest has breakfast after checking out
- Scenario evolution 2 Handling of charges by "drop-ins"
 A non-guest dines at the hotel restaurant

Process-Centric approach for Hotel scenario

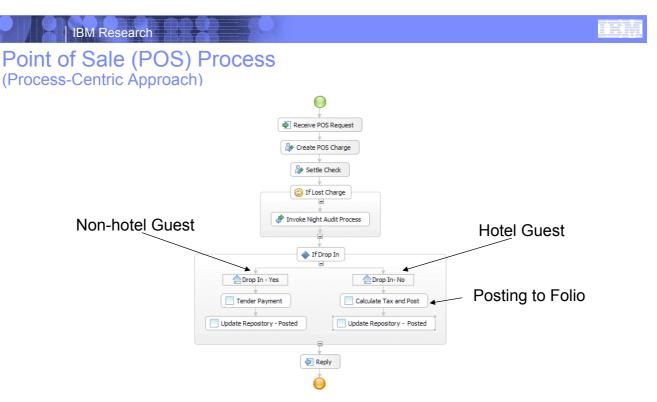
© 2009 IBM Corporation IBM Research **Check in- Checkout Process** (Process-Centric Approach) 🔶 Receive Check In Request 🎥 Check In Waiting for Checkout Request Update Repository - Active Folio Receive Checkout Request Long Running Flow: 🎥 Check Out Remains active until Guest • checks out Update Repository - Settled Folio The Guest Stay information is • lost in the process instance data 🥭 Reply



- · Multiple instances of the process created for each day for each guest
- No direct link between check in process and night audit process.



Night audit process modeled as part of main flow to avoid multiple process instances being created.



POS modeled as separate process as this can be instantiated independently any number of times.



Summary (Process-Centric Approach)

- Discrete/Disjoint Processes
- Data is an after thought
- Guest stay information lost in long running process instances
- Lots of additional coding needed to integrate to Databases and Services

Entity-Centric approach of Hotel Scenario

Identify key Business Entities

-Guest Stay

- States: Started, CheckedIn, RoomAssigned, CheckedOut
- Information: Stay_ID, CheckInDate, CheckOutDate Guest Name, Guest Profile, Guest Type,, Room Rate, Room Preferences, Room Number Assigned, Folio Info

–Guest Folio

- States: Started, Active, Settled
- Information: Folio_ID, Guest Name, Room Number Assigned

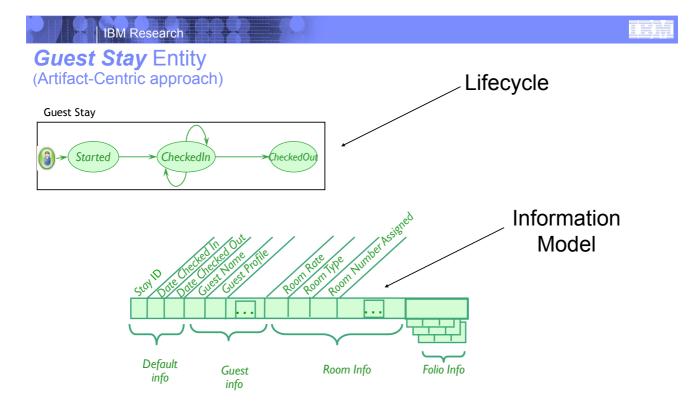
-Charge

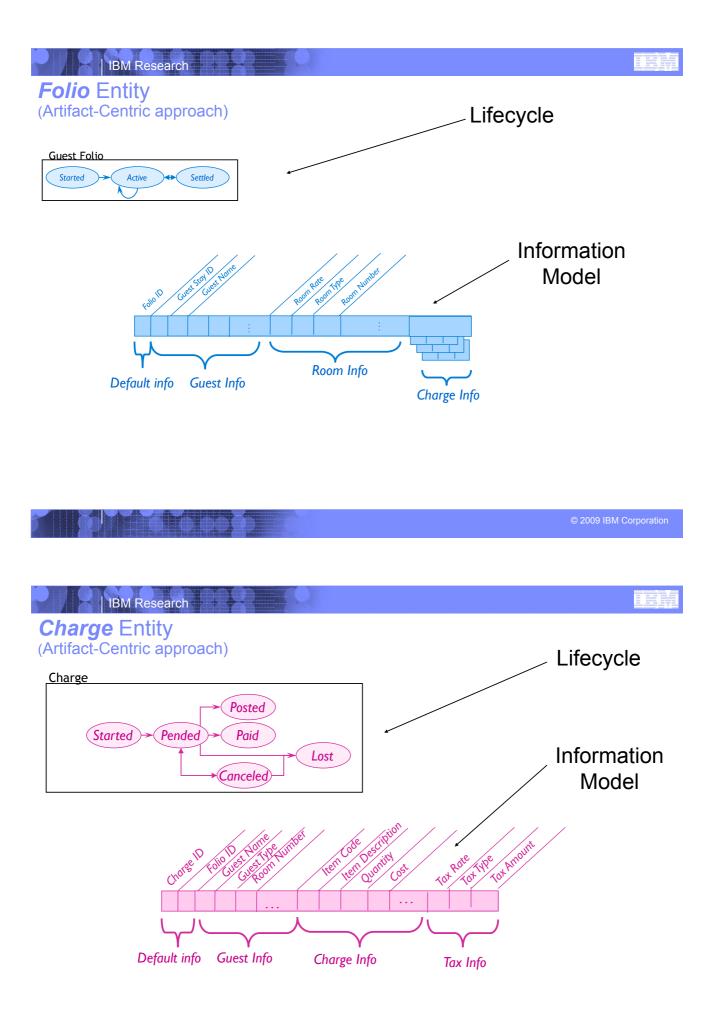
- States: Start, Pended, Paid, Posted, Lost, Cancelled
- Information: Charge_ID, Date Incurred, Charge Type, Room Number, Payment Type, ItemInfo(code,desc, qty, cost), TaxInfo(Tax Rate, Desc, TaxTotal)

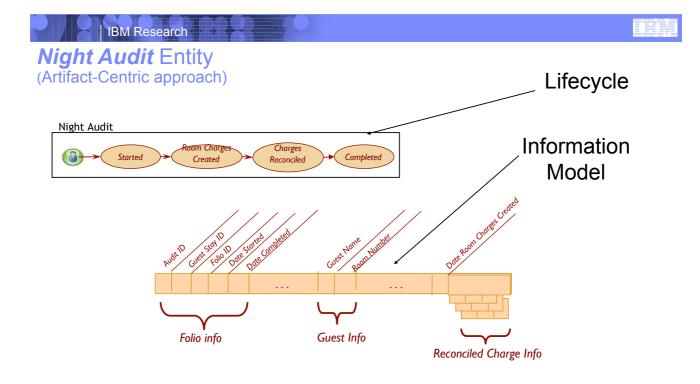
-Night Audit

- States: Started, InProgress, Completed
- Information: Audit_ID, Stay_ID, Folio_ID, GuestName, Room Number, DataAuditStarted, DateAuditCompleted. reconciledCharges(1..n)



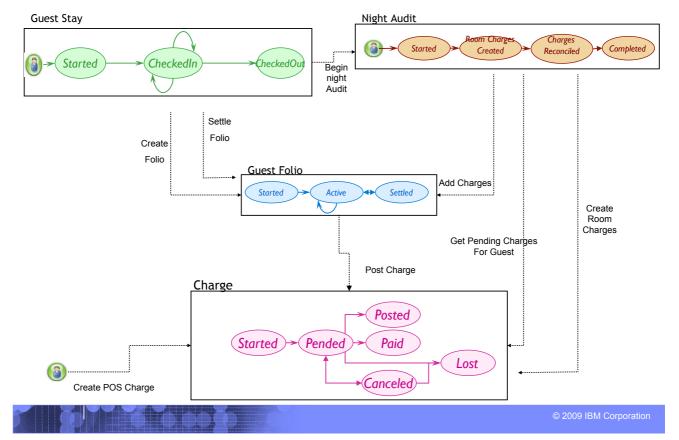








Business Entity Lifecycles and Business Entity Interactions



Some comparison points

Process-Centric Approach

- -Process flows act as controllers
- -Data is an after thought
- -Some Operational data hidden in long running process data
- Humans Work on "blocked" tasks in long running flows
- Performance of long running flows not desirable

Artifact-Centric Approach

- -Entities act as controllers
- Data is Core
 - Business Entities accessible in DB
- All Operation Data store in Business Entities
 - Queryable, Trackable, Measurable
- Humans work on Business Entities that are ready
- -Performance of Entities (info, lifecycle, micro flows) considered acceptable

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Business-Entities provide improved communication among stakeholders in the business

• "Along" the artifact:

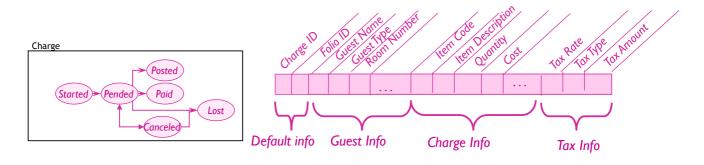
- People at "PENDED" can discuss meaningfully with people at "POSTED"
- Can discuss attribute values produced, needed by different tasks

"Across variations":

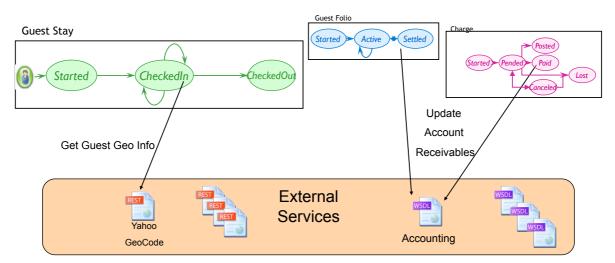
Different regions can communicate using shared abstract model
 (Variation of Rules in lifecycles and Process Steps)

"Up/down management chain"

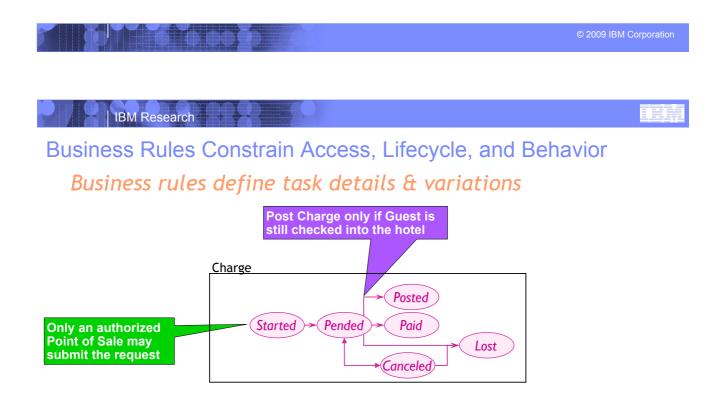
Artifact approach lends itself to more abstract / more detailed specifications



Business Entities give context for Service Invocations External Service Integration (REST and WSDL)



Large Collection of Externals Services Contextualized by Business Entities



- Rules define how lifecycles can be traversed
- Rules can also define how flows, and data can be manipulated



Introduction to Siena (Light-weight Artifact-Centric Modeling and Execution tool)

Empower SME's to easily Innovate new processes

- -Tools and Runtime often too heavy and hard to understand
- -Innovators currently dependent on IT teams

Radical Simplification of Tools and Runtime

-Siena Core Meta Model

· Describes semantics for all modeling constructs of Business Entities

-Model Management Engine

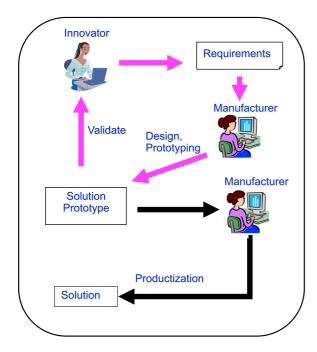
· Web UI Modeling tool for producing Business Entity models

-Model Execution Engine

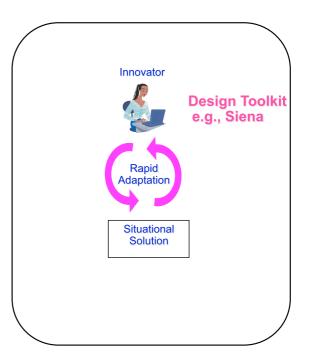
- Default Execution UI for deploying and executing Business-Entity models
- Directly executes Business Entity models
- No coding necessary, No code generation
- Small footprint can be easily hosted anywhere including laptop

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Innovator's toolkit for Business Process Modeling (Democratization of Innovation – Eric Von Hippel)



Manufacturer-centered innovation



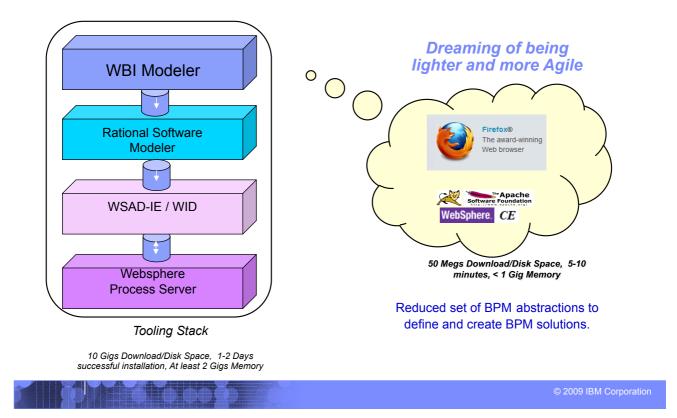
Innovator-centered innovation

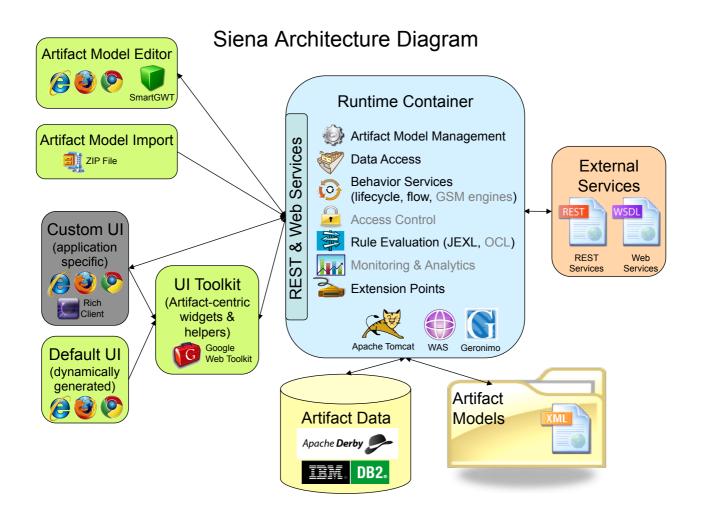
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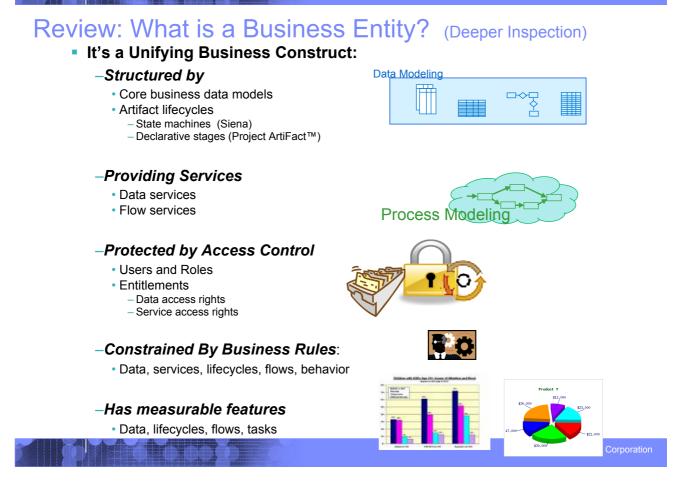
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Radical Simplification of Tools and Runtime

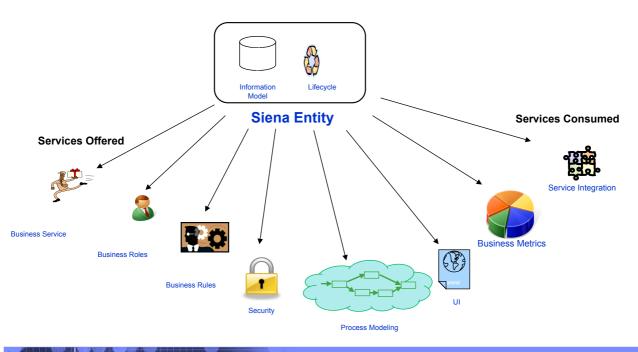
(Supporting Business Process Management Applications using Entity Centric Modeling)







Siena Entity (The Core of Siena)



- Review Hotel Design
- Run Hotel Design



Demo Wrap Up Questions and Answers

Lecture #2

Summary of Lecture #1

Review Siena Hotel Example (Deep Dive)

- -Review the Siena Modeling Tool
- Review the Model Execution Engine
- Install Siena

 Hello World (Follow Instructor)
- **Possible Homework Assignment** Due on Lecture #4 (Review)

-Homework Lab: (No External Services)

- **Procurement** (*Purchases with multiple items*)
- Insurance (Claims with payments or fraud detection)
- Banking (accounts with deposits and withdrawals)

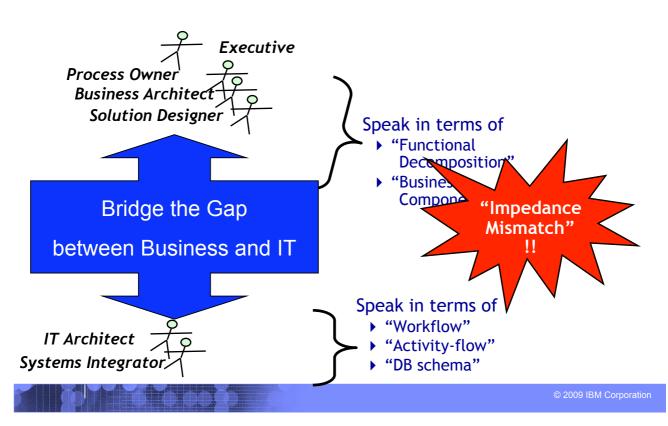
-Final Project

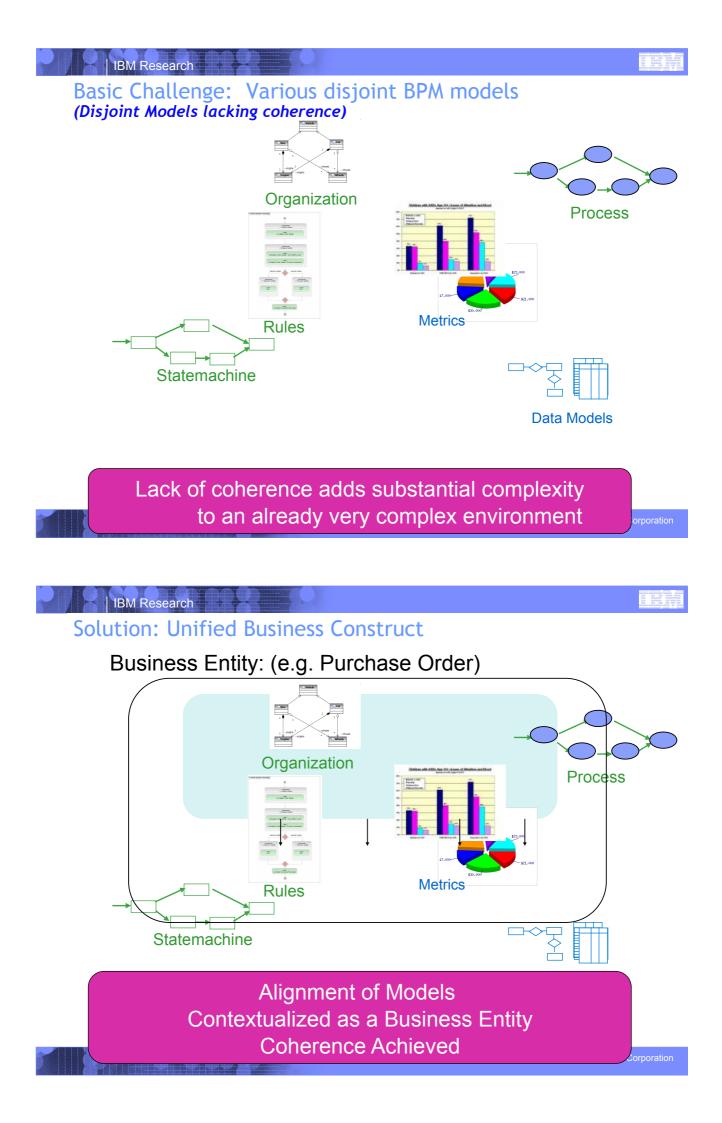
- Use some external services
 - -Internet or Custom Servlets

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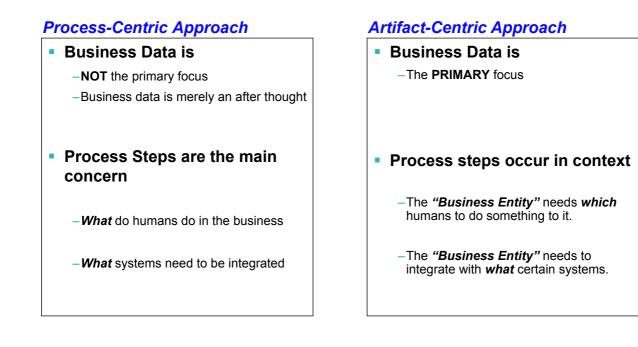
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Review: A Key Challenge in Business Process Management (Many Stakeholders in an Enterprise)

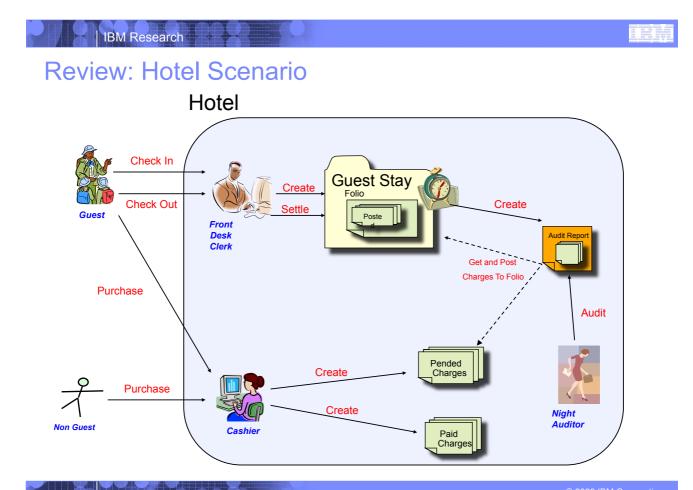




Brief comparison of BPM approaches

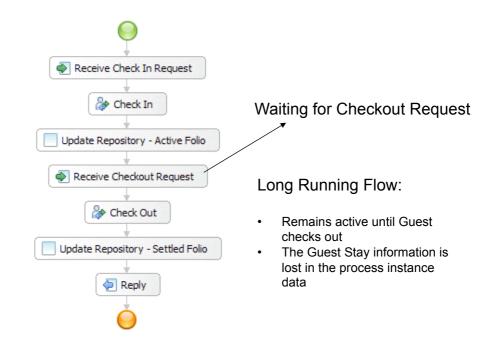


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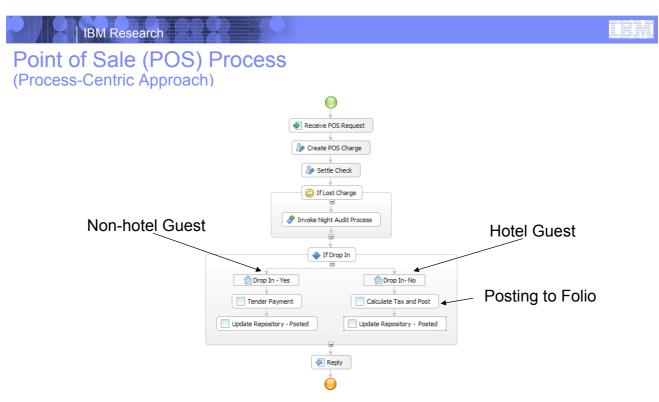


Check in- Checkout Process

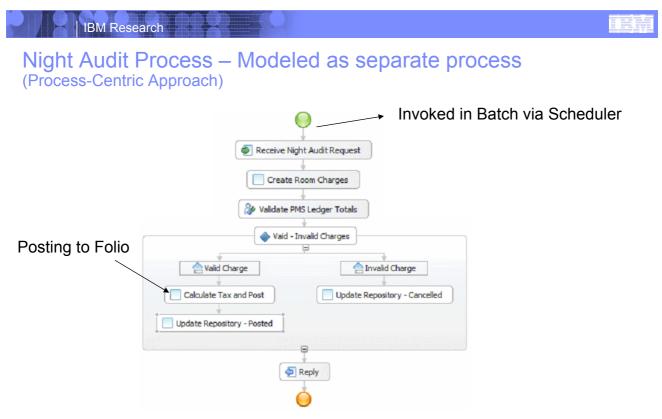
(Process-Centric Approach)



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POS modeled as separate process as this can be instantiated independently any number of times.



- Multiple instances of the process created for each day for each guest
- No direct link between check in process and night audit process.



Summary (Process-Centric Approach)

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–Guest Stay

- Information
- States

-Guest Folio

- Information
- States

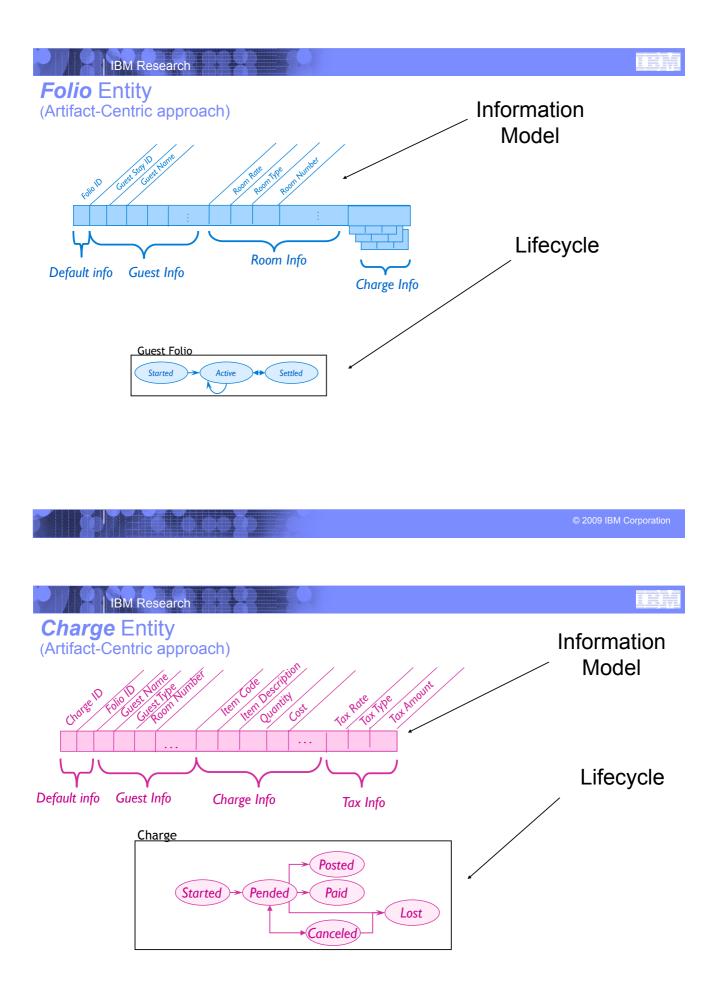
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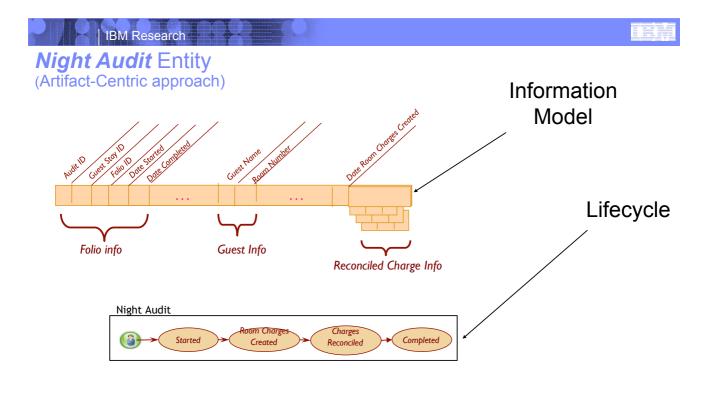
- Information
- States

-Night Audit

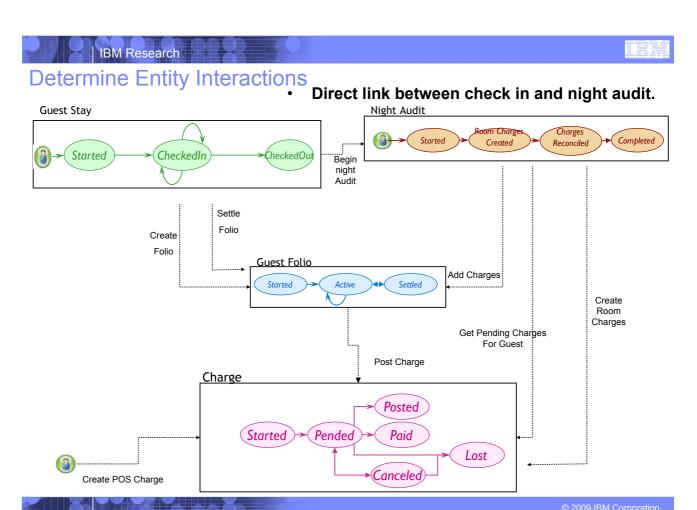
- Information
- States

© 2009 IBM Corporation **IBM Research** Guest Stay Entity (Artifact-Centric approach) Information Room Number Assen Model RoomMP Staylo .oom Default Guest Room Info Folio Info info info Lifecycle Guest Stay Started CheckedIn CheckedOut (8









Some comparison points

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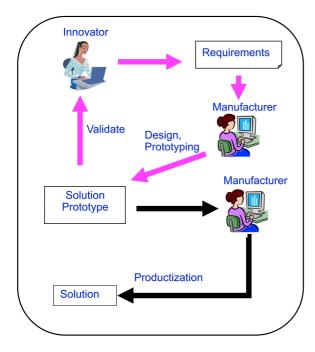
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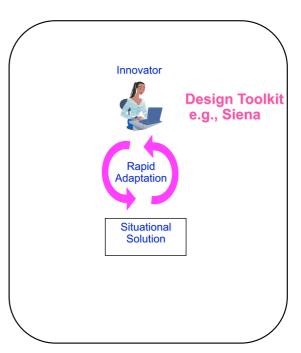
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Innovator's toolkit for Business Process Modeling (Democratization of Innovation – Eric Von Hippel)

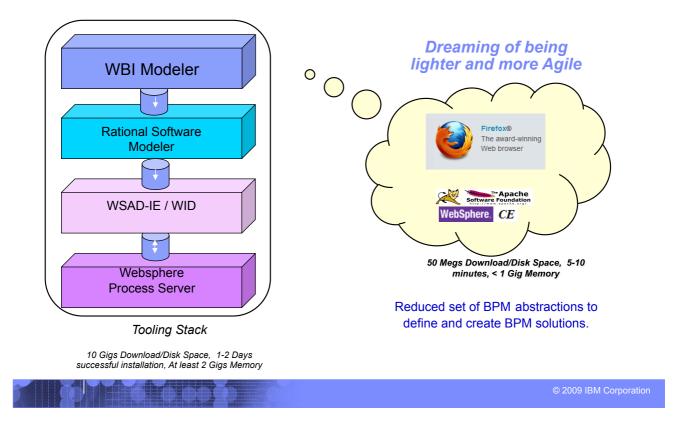


Manufacturer-centered innovation

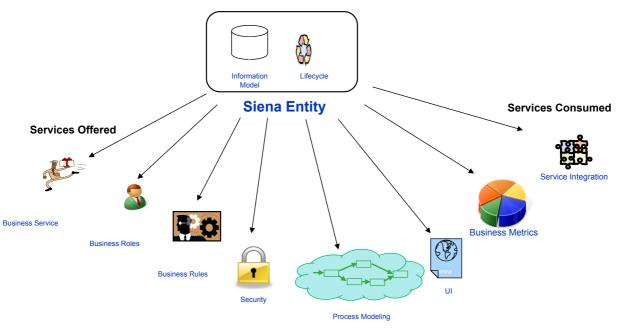


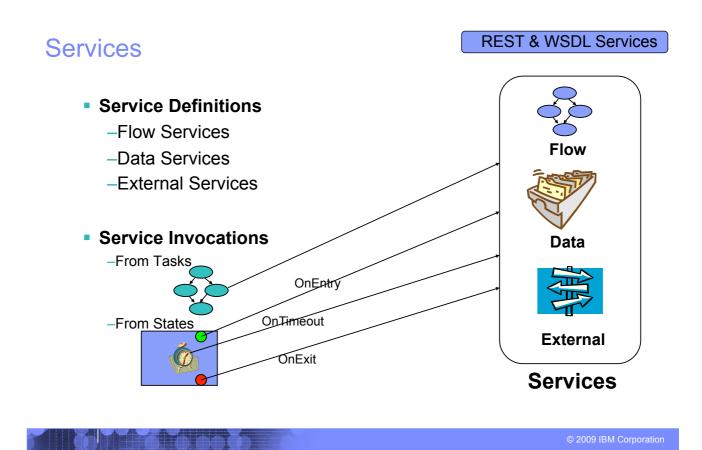
Innovator-centered innovation



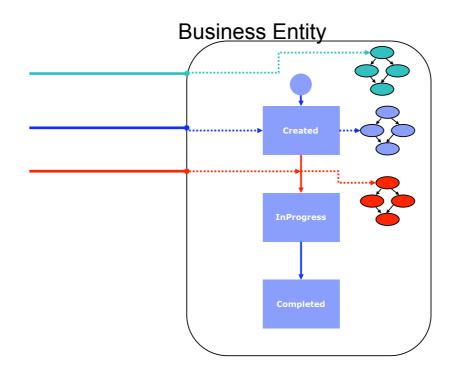




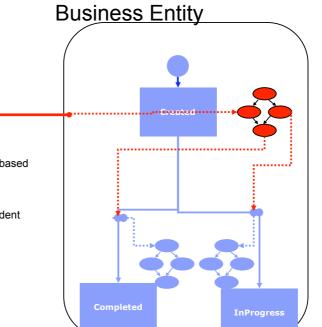




Basic Flow Patterns







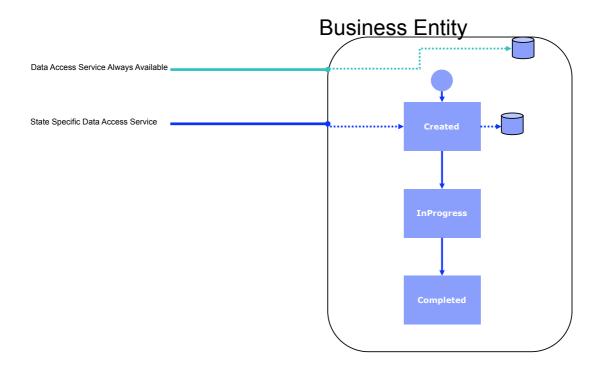
One Flow can invoke multiple transitions based on Flow outcome

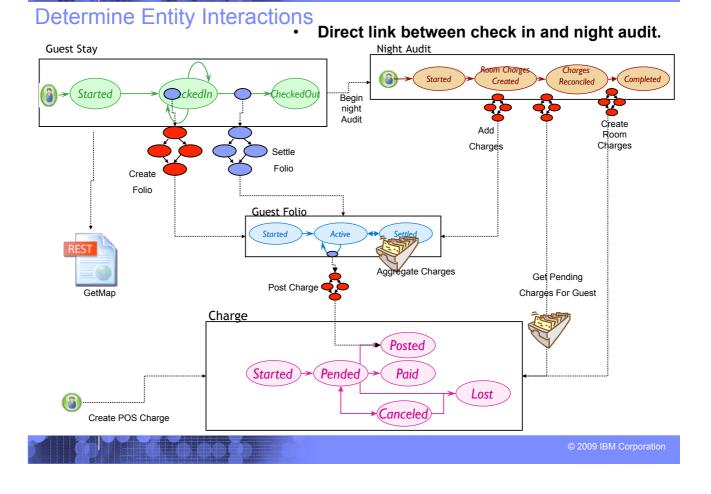
• Each Transition can in turn have Independent Transition Flows as well

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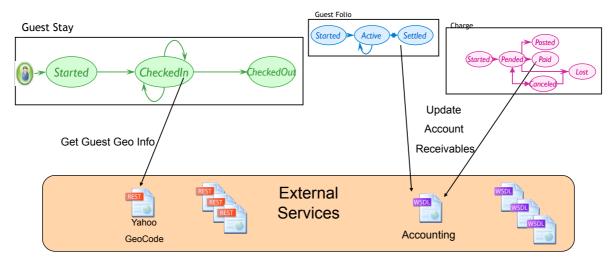
Basic Data Access Patterns





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Business Entities give context for Service Invocations External Service Integration (REST and WSDL)



Large Collection of Externals Services Contextualized by Business Entities

Time to Install Siena

Pass USB Sticks around the room and install onto your laptops

-Install/Unzip into C:\SienaWeb

Double click startup.bat
 UID: defaultAdmin pwd:

Follow Instructor on Presentation Screen

- -Hello World example with 1 artifact
 - Information Model
 - Lifecycle Model

Work in groups of two or three

-Discuss steps among each other

Possible Homework Assignment Due on Lecture #4 (Review)

-Homework Lab: (No External Services)

- **Procurement** (Purchases with multiple Line Items)
- Insurance (Claims with Payments and Fraud detection)
- Banking (Accounts with Deposits and Withdrawals)

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Lecture #3

- More Siena Examples (Patrizia and Alessio)
 - -Radio Sapienza
 - -Relay Race
 - -Color Bricks
 - -Clinical

Review Siena Meta Model

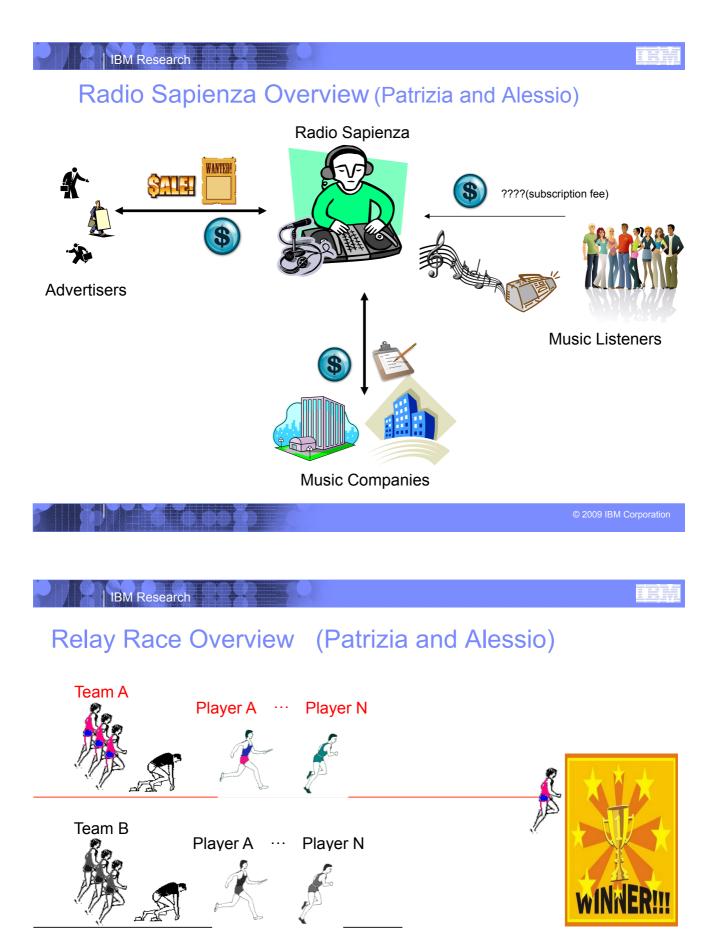
- -Review model elements
- -Review an instance of Siena.XML

Model Driven Architecture

-Explain Models an MDA.....Explain traditional Models to Code Generation

Model Driven Execution

-Explain Model Driven execution.



- All Players Run at Random Speeds
- Siena Controls Relay Race Servlets/External Services

CLINIC





- Manages information about the examinations: data of patients, description of the reports, admissions to a ward.
- Manages the ambulances: external services to find destination address and to visualize the map.

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COLOR BRICKS

Columns: 4		
Rows: 4		
Cells: 10		

- Plays a game respecting the constraints.
- The user can choose the number of cells and the dimension of the matrix.
- Purpose: Siena is able to manage a big amount of instances.



PLAYLIST
TRACK
PLAYER





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Information Model: PLAYLIST

- Name (string):
 name of the playlist.
- DurationTot (long):
 total duration of the playlist.
- PlayerID (long):
 ID of the player that is playing the playlist.
- TrackList (TypeTrack):
 list of tracks that compose the playlist.
- TrackPlayed (TypeTrack):
 - informations of the track that is actually played.





Information Model: TRACK

- TempPlaylistID (long):
 ID of the playlist that is playing the track.
- StartTime (dateTime):
 date and time in which the track is played
- PauseTime (dateTime)
- ResumeTime (dateTime)
- RemainingDuration (long):

 remaining duration of the track after a "resume" action.
- TrackInfo (TypeTrack):
 informations of the track.



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EXTERNAL SERVICE: BrowseAmp

- WinAmp is a media player.
- It is controlled by the plugin "BrowseAmp".
- BrowseAmp offers a RESTful service
 - Allows us to control WinAmp with simply URLs
 - Play
 - Stop
 - Pause
 - Resume

RadioSapienza



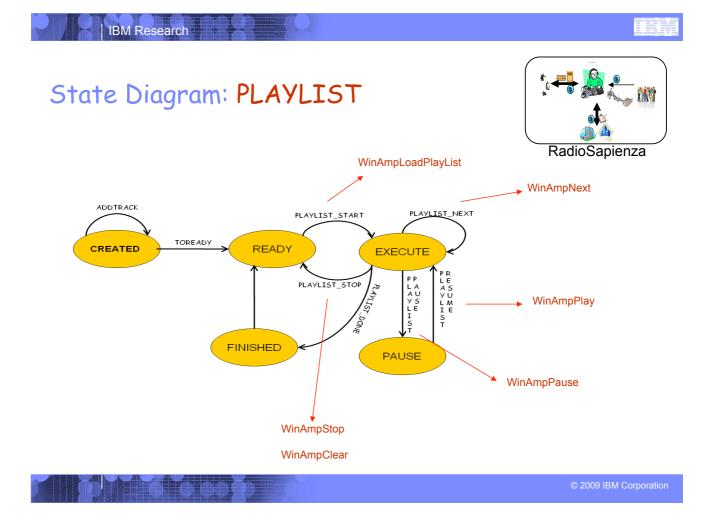


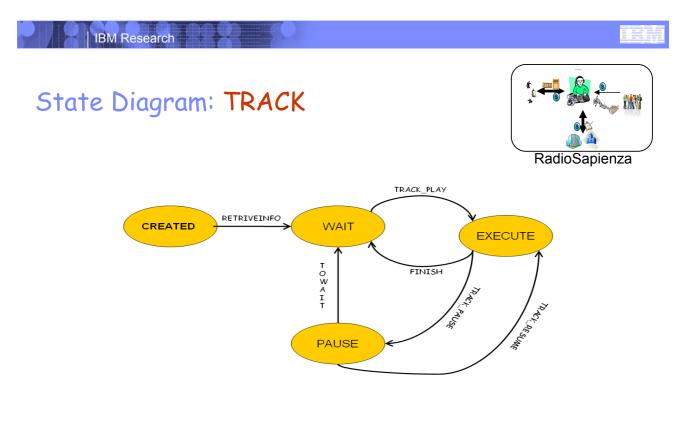
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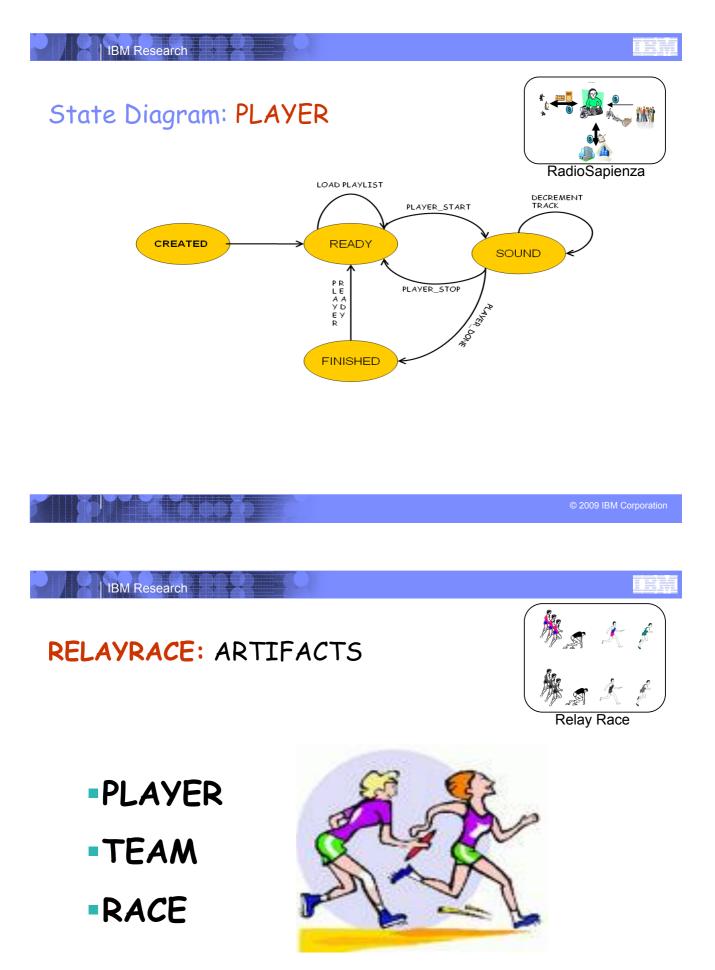


- Oddcast sends the parameters to WinAmp that it is playing on the port 8002.
- IceCast broadcasts on internet the stream of data that arrives on that port.
- The users can listen the playlist using the link: <u>http://151.100.59.92:8002/Radiosapienza.m3u</u> (address of the server in which all the applications run).









- Name (String):
 Player's name.
- Speed (Float):
 Player's velocity.
- Time (Long):
 Space / Speed (m/s).
- TeamID (Long):
 - ID of the player's team.





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Information Model: TEAM

- Name (String):
 Name of the Team.
- TotalTime (Long):
 Time spent to finish the race.
- RaceID (Long):
 ID of the race in which the team is playing.
- PlayerList (PlayerType):
 List of players of the team.





Information Model: RACE



-Name of the Race.

- **TeamList** (TeamType):
 - -List of team that takes part in the race.

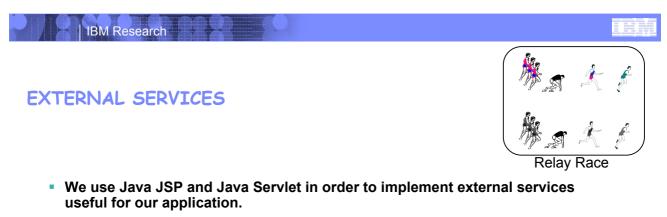
• **Results** (Results):

Arrival ranking of the teams at the end of the race.





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- Siena manages the race, controls the competition and sends to the JSP pages all the attributes required.
- The external services are:
 - RaceService:

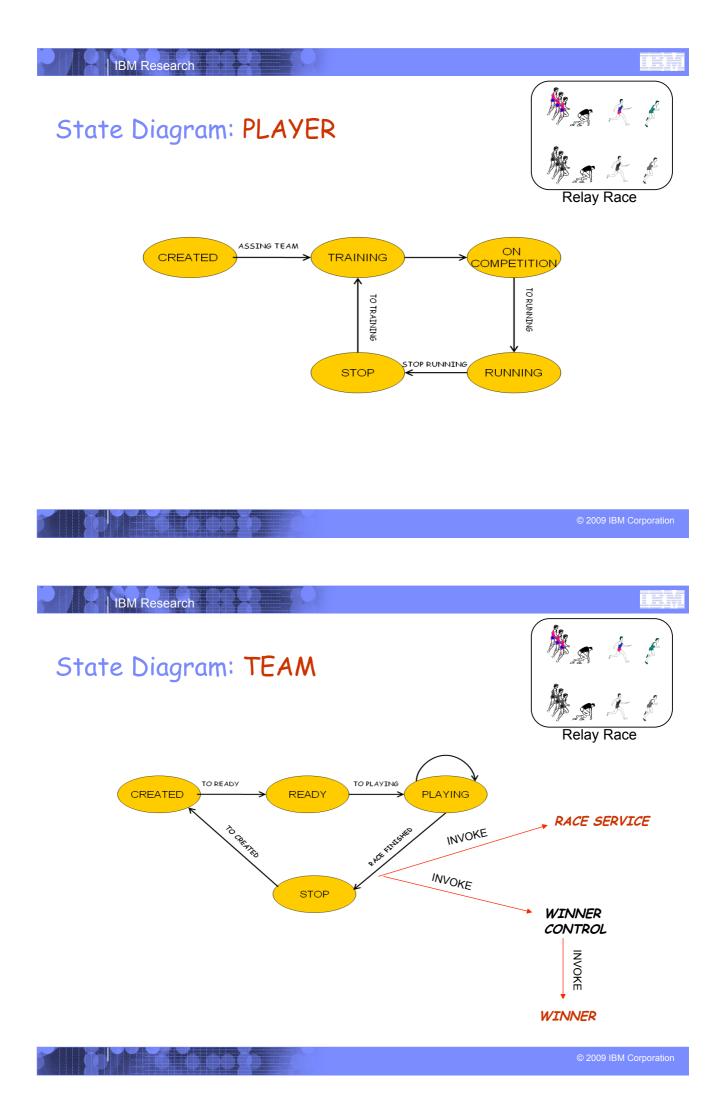
><u>http://localhost:8080/Race/Race</u> creates the Race.

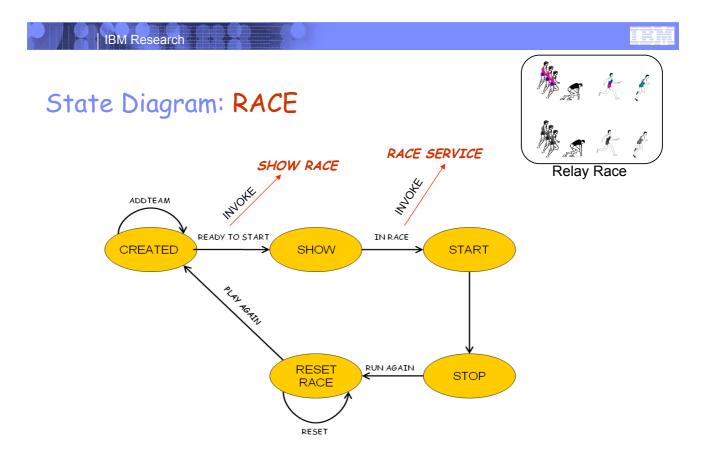
- ShowRace:

<u>http://localhost:8080/OpenURL/Open</u> opens a window that shows the race.

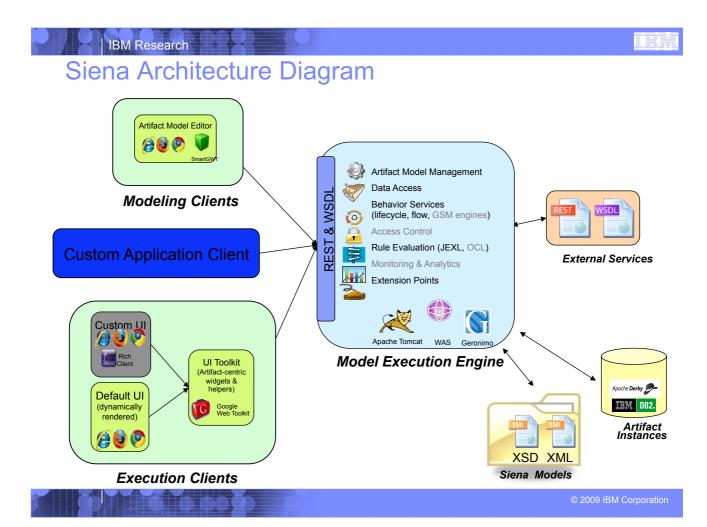
- Winner:

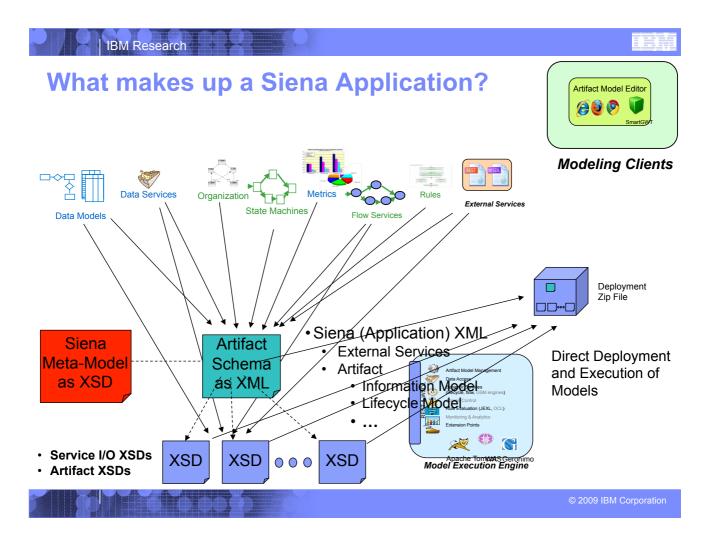
>opens a window with all the informations about the winner.

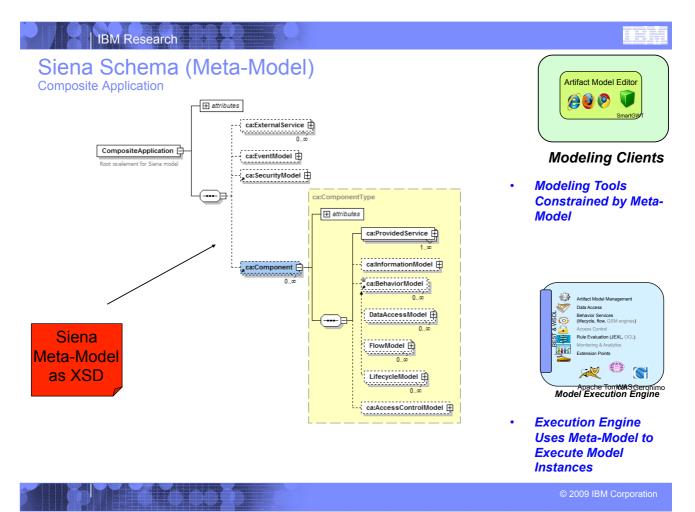










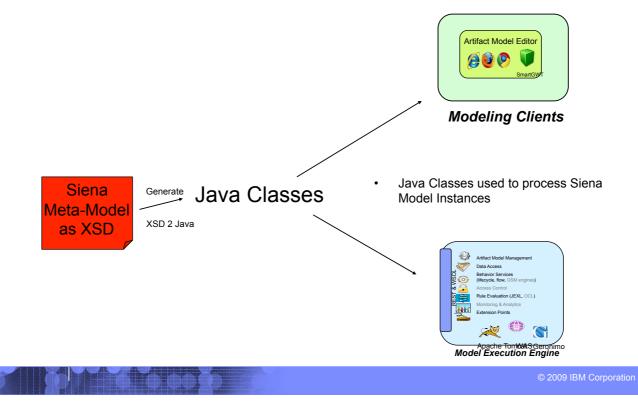


Lets now Inspect the model Using an XML Editor

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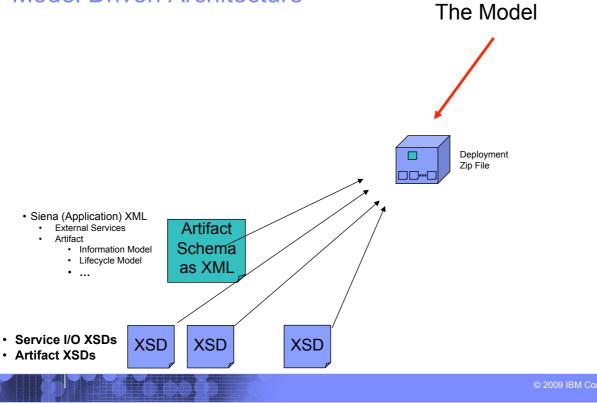
Explore the Development Environment in Eclipse

Generate Java from Siena Meta-Model



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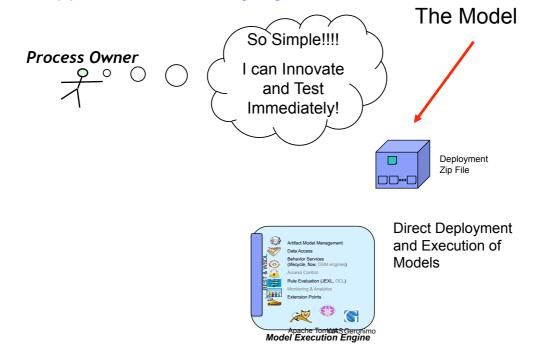
Model Driven Architecture



Traditional Approach: Generate Model Into Code The Model Now what do I **Process Owner** do with all this Ο stuff? Deployment Zip File JavaScript **WSDL** HTML **XML JSPs Servlets** ACL **EJBs** Lots and Lots of **BPEL JAVA XSD** SQL DDL

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Siena Approach: Direct Deploy and Execute Models



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Review homework

- -DEMOs
- -Questions and Answers

Siena System Internals

-Questions and Answers

Web Services

-Service Facade

- RESTful
- WSDL
- Service Invocation
 - Internal
 - Flow, Data • **External**
 - RESTful and WSDL

Future Artifact Designs

- –GSM style
 - Event Driven
 - No Wires/Transitions

Artifact Design Patterns

- -One-One
- -One-Many
- -Many-Many

Feedback

- -Course improvements
 - Content
 - More Systems?
 - More Database?
 - More Services
 - More???

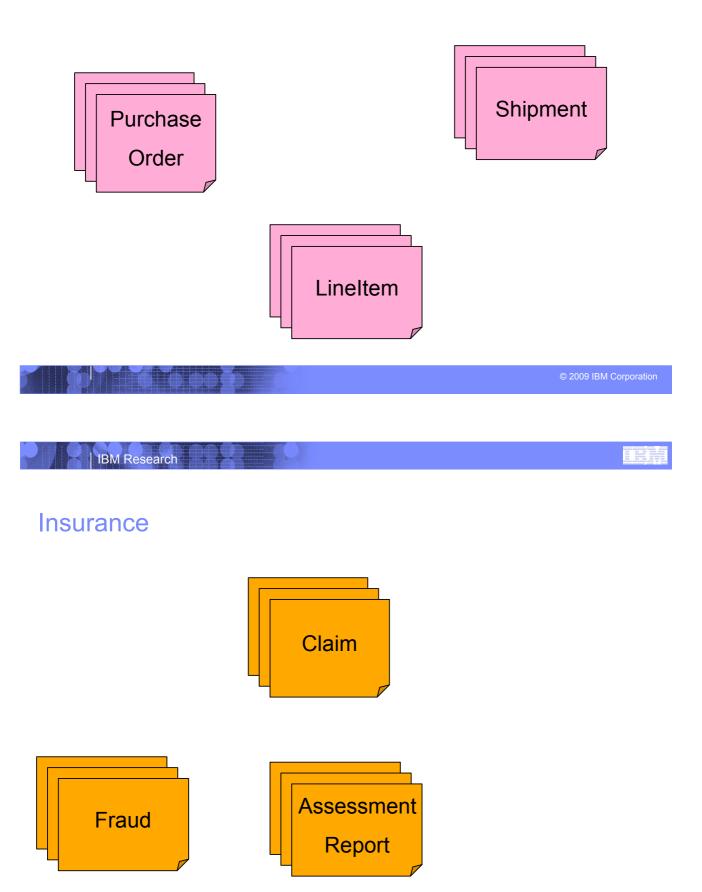
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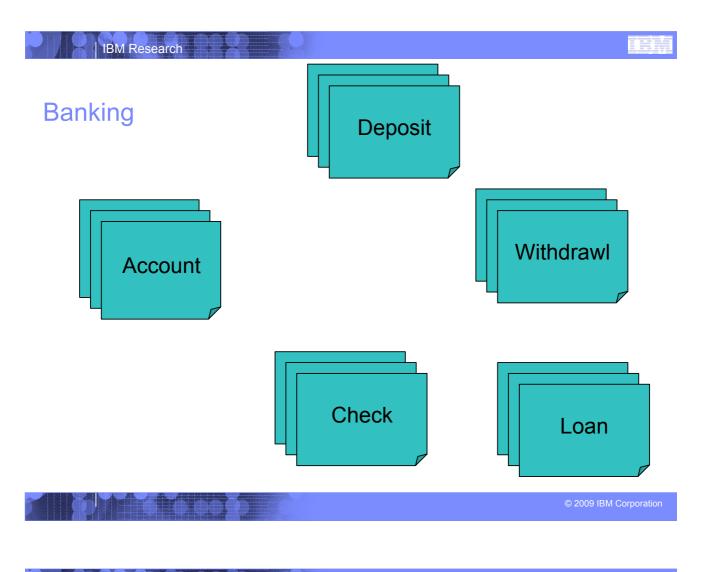
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Review Homework Problems

- Homework reviews/demos
- PLEASE ASK QUESTIONS
- Questions and Answers
 - Procurement (Purchases with multiple items)
 - •Insurance (Claims with payments or fraud detection)
 - •Banking (accounts with deposits and withdrawals)

Procurement



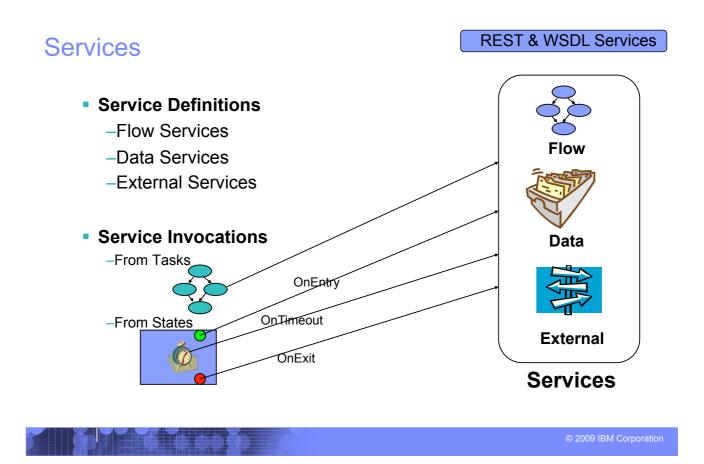


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Siena System Internals

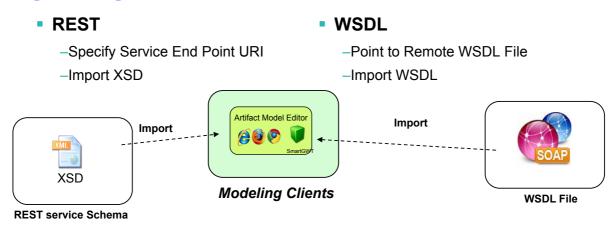
Questions and Answers

- Meta-model
- Model Instances
- Modeling UI
- Model Execution Engine
- Default Execution UI
- Custom UIs

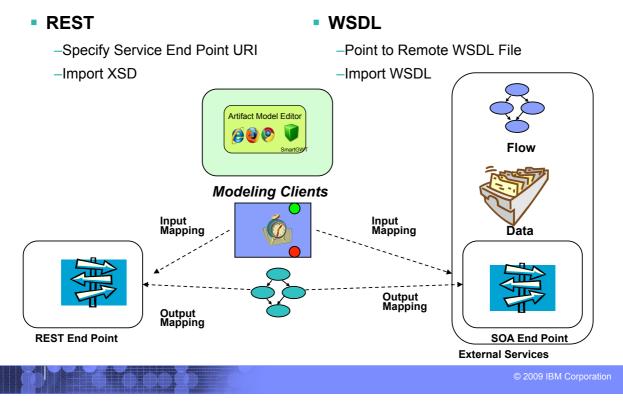


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Registering External Services



Binding and Mapping External Services



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Client Toolkit: Siena API Façade (RESTful Siena)

SienaServiceClient API

- Generic RESTful API to call Siena
- Support for XML Input, XML Output, JSON Input, JSON Output
- API:
 - SienaServiceClient sienaClient = new SienaServiceClient();
 - Restful Service Façade
 - sienaClient.invokeXml();
 - Invoke Services (flow services, data services, transition services)
 - sienaClient.retrieveListXml();
 - Retrieve Artifact Instance Lists
 - sienaClient.retrieveXml();
 - Retrieve a single Artifact Instance
 - sienaClient.saveXml();
 Save a single Artifact Instance

Inspect Code: using eclipse

```
static String appName = "ClientTest";
static String dataItemId = "MyArtifact";
static String serviceId = "MyArtifact-ANY-to-Created-OTransition";
static String inProgressServiceId = "MyArtifact-Created-to-InProgress-OTransition";
String ArtifactXML = "<MyArtifact</pre>
                        attribute1='Via Labicana' attribute2='Roma' attribute3='Terry' attribute4='Heath'>
                     </MyArtifact>";
            // Make a New Client
            SienaServiceClient client = new SienaServiceClient("http://localhost:8080/SienaWeb", "defaultAdmin", null);
            // Invoke Any to Created
            String invokeXmlOutputMessage = client.invokeXml(appName, serviceId, URLEncoder.encode(ArtifactXML);
            // Extract newly created ID from new Instance
            String id = parseIDFromXML( invokeXmlOutputMessage );
            // Invoke Created to InProgress
            String inProgInputXML = "<MyArtifact ID='" + id + "' />";
            String inProgOutputXML = client.invokeXml(appName,inProgressServiceId, URLEncoder.encode(inProgInputXML);
                                                                                               © 2009 IBM Corporation
```

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Run Example Client from Eclipse

- Jump to IDE
- RUN

Client Toolkit: Siena API Façade (*RESTful* Siena)

WSDL Siena

Solution Specific WSDL files

- Generated into deployed solution
- Use your favorite IDE to bind to WSDL files and invoke
- Generate JavaProxy Web Service Client
- Begin to Invoke WSDL Operations onto the Solution Specific Artifacts



Artifact Relationship Patterns

(One to One)

-Insurance Claim can related to 1 Fraud

(One to Many)

-Parent / Child

- Purchase Order
 _Line Items
- (Many To Many)

-Purchase Order

- Each Purchase Order can be delivered in 1 or more shipments
- -Shipment
 - Each shipment can contain Line Items from different Purchase Orders

Future Artifact-Centric work

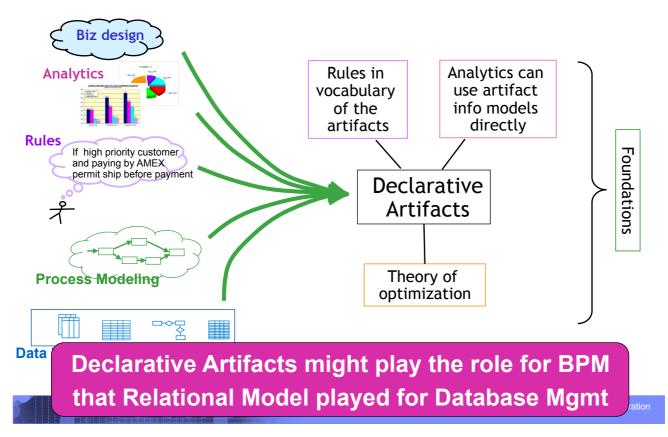
- Further Siena Web Tooling Features
- Optimize Siena Engine
- Project ArtiFact ™
 - -Declarative Approach (no wires or transitions)
 - Guards, Stages and Milestones



What is Project ArtiFact[™] GSM

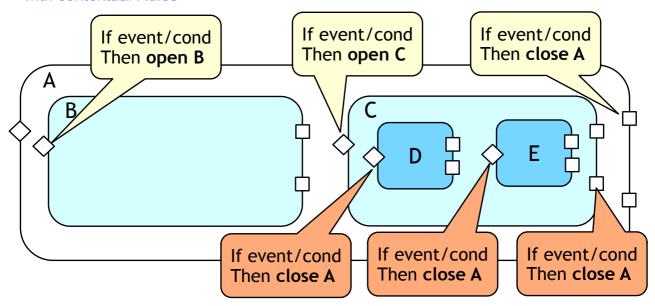
- Hierarchical Units of Work
 - –Units of Work (Stages)
 - Launch by Conditions (Guards)
 - •Completed by Expressions (*Milestones*)

Declarative Artifact-Centric as a unifying basis for future BPM



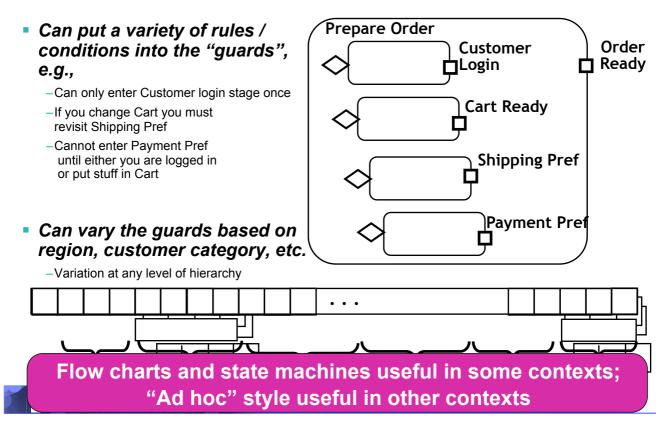
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Hierarchical Stages (Units of Work) with contextual Rules



A stage focuses on a natural, small cluster of related rules

More on the "guarded" style for lifecycle specs



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Feedback

-Please Fill out the Feedback Form

-Course improvements

- Too Slow?
- Too Fast?
- More Content?
- More Systems?
- More Database?
- More Services
- More???