Demo Script:

In this demonstration, you will see how to start using IBM's Business Process Modeling Notation (BPMN) Stencil with one of the most popular desktop design tool, Microsoft Visio, to start defining and modeling business processes for continues improvement, system automation, and optimization.

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Once you have completed the quick registration process, you will be taken to the download site to obtain your free IBM BPMN stencil for Microsoft Visio. Before you proceed to download the stencil, it is recommended that you open Microsoft Visio. Once you have that application opened on your desktop, simply click on the link to download, select "Save File", and proceed to open the stencil. Be sure to note where the file is downloaded to. In this case, it's being downloaded to your desktop. Notice how the BPMN stencil is opened right within the Visio application. At this time, you may select "Save As" and save the Stencil in the "My Shapes" folder for ease of retrieval in the future.

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 Now let's get started with the process design using the IBM BPMN stencil you just downloaded and saved. Start a new file using the shortcut icon or go to "File" and select "New". For this demonstration, the page orientation will be changed to Landscape view to better accommodate the process diagram. To open your IBM BPMN stencil, just go to "My Shapes" shortcut and select "BPMN" stencil to open it.

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To design a process diagram using the BPMN standard, first create a process pool by dragging the "Horizontal Pool" shape from the stencil and dropping it onto the page. This pool is a container for the process you are designing and will encompass all the process elements and definitions within it. Next, drag and drop a "Horizontal Lane", which identifies task owners within the process pool. You should then name the process pool and lanes by double-clicking on the object.

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Now, every process has a beginning and an end, so let's start by dragging the "Start Event" shape from the stencil. Perhaps a certain document and information are required to initiate this process. In that case, select the "Data Object" shape, drag-and-drop, and then proceed to provide a name for them both. Next, link each Data Object with the start step through the "Association" line which easily snaps-into-place.

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Next, you may have a mini process that is the same and can be repeated or reused throughout various larger processes. To minimize redundant process and system design efforts, these should be set-up as a sub-process using the "Collapsed Sub-Process" shape. Now instead of using the "Association" link, a "Sequence Flow" is needed here to indicate logical, sequential workflow order. In addition, there may be a human task component that is part of the process. So select the "Task" shape, place it in the "Agent" lane to designate responsibility and action, followed by another "Sequence Flow".

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Most business processes embed decisions that need to be made by human or by a system. In this example, the decision is system-driven, "Data-based" and "Exclusive", meaning one outcome or the other. The two possible outcomes of a typical claims process is: Reject or Accept. So let's go ahead and drop those into the process pool. In addition, you may want to define and specify the data rules that determine this decision, which is base on an estimate amount: if it's more than $1,000, it gets rejected; estimates less than $1,000 gets an automatic settlement. In reality, the decision-tree is probably a lot more complex, involving exceptions, additional reviews, and investigations before an outcome is determined.

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For the sake of this quick demonstration, we will go ahead and end this process with two "End Event" shapes. Once your process diagram is complete, save it as a Visio Drawing with a "VSD" extension. If this process is for system automation, you should also do a "Save As" and select XML Drawing with a "VDX" extension.

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Lastly, let's take a look at how a Visio diagram could be imported into a Process Engine, such as IBM FileNet Business Process Manager. Here you see a complete Claims Process diagram using IBM's BPMN stencil in Microsoft Visio with additional tabs defining the sub-processes.

To import, start the Process Designer application through the IBM FileNet Workplace, go to "File" and select "Import Visio File" to launch the import wizard. Click "Browse" to find and select the "VDX" XML drawing you saved previously, and hit next. Notice how the pages in the drawing are automatically identified and selected. You may, of course, import the pages one at a time.

The next window will show you the mapping specifications – where you could choose to see "Unmapped shapes only" or to "Display all shapes" so you may review how the BPMN shapes are mapped to Process Designer Objects. Lastly, you will receive an Import Summary before you select "Finish" to complete the process. Now your Visio drawing has been imported into Process Designer so you don't have to re-design everything again in this environment. You should also run a validation check to make sure it is a functional workflow.

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For additional information on how IBM's Business Process Modeling Notation stencil and IBM FileNet Connector for Microsoft Visio can help accelerate your FileNet Business Process Management implementation, please check out these additional resources or contact your IBM Client Executive for more detail.