

Savvion BusinessManager™ Platform Savvion BPM Portal™

Access and control all aspects of your process applications

Overview

Savvion's BPM Portal is Savvion BusinessManager's web-based central point of access for controlling Savvion BusinessManager applications. Depending on user type and access permissions, users can:

- Display and modify tasks assigned to them.
- View what is happening in the business via customized dashboards.
- Query and report on key data by leveraging out-of-the-box reports or create custom reports with powerful report builders.
- Modify configuration parameters in run-time to suit business needs.
- Administer Savvion BusinessManager user rights and applications.

These functions and more are grouped into three key modules:



Home Module

Manage your tasks. Get help and reassign work. Find places where you can help.

The Home Module, the primary interface for Savvion BusinessManager, enables users to access Savvion BusinessManager applications, obtain real-time information to perform tasks, and launch process instances. The Home Module not only logs entries to tasks and applications, but also links useful resources including documents, external URLs and additional applications and services so that tasks are always fulfilled as strategically and timely as an organization requires.

- **Task Manager** – Users can view and manage a list of tasks assigned to them or to a group and view available work where they can help. Users can also delegate or reassign a task when necessary, and even retrieve the next available task automatically.
- **Process Concierge** – Provides run time collaboration tools which allow people to request help from their colleagues. Such assistance can include requests for comments or input on critical data. The requestor remains in charge of their primary work, so they still maintain control when requesting assistance. The details around such ad-hoc assistance are fully audited so that shadow processes can be intercepted and standardized.
- **Personal Dashboards** – Get all the information you need from one central location. Drag and drop from a library of preconfigured dashboard widgets to personalize your work experience. Hotlink to reports, work lists, process audit trails and escalation tools—all via a single intuitive interface.
- **Business Calendaring** – Configure when you are available for work and set escalation settings for the work for which you are responsible. Ensure work doesn't drop into work queues that won't be picked up in a timely fashion.
- **My Instances** – Monitor instances that you have created yourself
- **Process Status Viewer** – View status of a process at any given time in a format that makes the most sense, either report tablet or visual workflow.
- **Bulk Task Update** – Open a common form for routine or related tasks, enter information once, and complete all tasks at once to save time and reduce errors.



Home Module: Default Home Page

Management Module

Change running processes to increase effectiveness. View achievement against key performance indicators. Assess risk and make changes to reduce exposure.

Managers use the Management module to launch Savvion BusinessManager applications; start, monitor and control process instances; and create, query and analyze data in the form of reports, graphs, and spreadsheets. Core functionality in this module is provided via eight menus:

- **Overview** – Provides an overview of all active processes including status checking of an instance or application and updating of work steps and work items.
- **Personal Dashboard** – Provides a personalized view and bookmarks to frequently used management components, including report graphs, scoreboards, task summaries, alert lists, and control boards. You can clearly see the progress and status of application processes. With Savvion's easy to configure dashboards, users can monitor the business activities that are important to them.
- **Reports** – Display available reports and provide the interface to define and create reports via the Savvion BusinessManager Report Builder or JasperReports.*
- **Instance Manager** – Efficiently manage large numbers of process instances, work steps and tasks, and perform tasks in batches rather than one-by-one.
- **Infopad Manager** – Update tables called Infopads that store global data such as application parameters (e.g., a list of email addresses) or rule parameters (e.g., the critical threshold for a resource load).
- **Forensic Auditing** – Get visibility into every change which every user makes to the process and the process data. The details of process assistance are also fully audited so that “shadow processes”—those steps that take place outside the process guidelines—can be intercepted and standardized for better compliance and governance.
- **Process Alerts** – Subscribe to real-time alerts from the portal which are generated based upon process instance conditions. These alerts can report on people, data or any other information business users need—without requiring them to perform continuous process monitoring. In addition, the Savvion Rules Engine can invoke Process Alerts in reaction to triggers generated by the Event Correlation Engine.

Fully Extensible

Extending and customizing the Management Module is significantly easier with the included public API. The Management Module API provides users with full access to low-level system behaviors facilitating customization of most features.



Management Module: Dashboard View

Administration Module

Control work queues. Administer user rights. Supervise servers and running applications. Access detailed audit trails to pinpoint issues.

The Administration Module enables Savvion BusinessManager Administrators to modify configuration parameters, manage user/group access, install/uninstall Savvion BusinessManager applications and publish Savvion BusinessManager applications as Web services. Specifically, the module provides:

Comprehensive Permissions and Access Control

User specific access is provided via the Administration Module's Access Control Management (ACLManager) utility, allowing administrators to add/remove user privileges, as well as develop custom portals specific to users and/or groups.

Strong Web Security

Savvion BusinessManager relies on the Secure Socket Layer (SSL) protocol to provide secure connections for Savvion BPM Portal modules. SSL provides data encryption and message integrity. With SSL implemented on both client and server, Internet communications are transmitted in encrypted form, so that information arrives unaltered at the specified server.

Integrated Savvion BPM Server Configuration Interface

The Savvion BPM Portal Administration Module gives administrators control over the core engines of the Savvion BPM Server. This includes administrative access to APIs, which affect the Process Engine, the Web Applications Engine, and the Savvion Rules Engine. Administrators can also control the audit behavior of the server via a configuration utility for the Repository Manager.

Savvion BPM Portal Technical Matrix

A powerful web-based application, the Savvion BPM Portal is accessible via any modern computer and web browser with Network/Internet access.

Minimum Required Browser

- Internet Explorer 6+
- Firefox 1.5+

Secure Data Transfer Protocols

- SSL (Secure Socket Layer).
- RMI over IIOP over SSL (RMI/IIOP/SSL) between EJB and portal components. *Note: This is not standard in Savvion BusinessManager but provided via J2EE compliant application servers such as:*
 - WebLogic 8.1 SP5
 - Pramatic 4.1 SP4
 - WebSphere 6.0.2.5

Refer to your application server documentation for information on enabling.

* JasperReports is an open source Java reporting tool. For more information, visit: <http://jasperreports.sourceforge.net/>



5104 Old Ironsides Drive
Suite 205
Santa Clara, California 95054
Toll free: 888-544-5511
www.savvion.com