Elevating Portals to Achieve Highly-Evolved Business Process Management

As practitioners of Human Capital Management, we strive to optimize the potential of our greatest assets: our people. The human brain is an incredibly complex organ, capable of quick, agile decision making, intuition, and sensitivity to nuance. As providers – or consumers – of automation, we try to utilize tools to improve our ability to apply our unique skills. Online portals, for example, are evolving from simple collections of Web sites, into actionable process-oriented tools, and ultimately intelligent assistants. This allows humans to focus on value-added activities. The reason: as the portal takes a more active role in automating end-to-end business processes, the user is freed from administrative tasks.

Business Process Management

For many decades the focus of business automation has been on huge, monolithic software systems. ERP software suites promised to automate "all" aspects of the enterprise. This turned out to *not* be the case. Key to the business model of many ERP vendors is to motivate customers to license modules to automate additional functions of the enterprise, with the promise that modules from the same vendor would work well together. This made companies dependent on ERP vendors to provide the functionality they needed. In addition, ERP software is considered by many to be difficult to navigate, and often requires special training and expertise.

A business process is a naturally-occurring phenomenon. Most business processes evolve from the immediate needs at hand, rather than as a result of careful planning or analysis. Software packages can be helpful tools, but rarely do they encompass end-to-end business processes (although recognizing this trend, ERP vendors are beginning to position themselves as the hub of business process activity). Thus, the procedures surrounding an enterprise software system are very structured, while the tasks surrounding the "human" portions of the business process remain in the realm of tacit knowledge.

Enter Business Process Management (BPM), which is an attempt to manage the entire end-to-end business process, encompassing the automated as well as the human components. The idea is not new; it has been around since the 1920's[1]. However fairly recent advances have made BPM more attainable.

One such advance is the Service Oriented Architecture (SOA), which is finally becoming robust and widespread. SOA is a method of defining software as small autonomous services, rather than monolithic integrated systems. Thus functional components can be accessed as they are needed, and can be mixed and matched between different systems. The task of being able to access disassociated systems is called Enterprise Application Integration (EAI). This too, is not a new concept. What is (relatively) new is the emergence of the Web, which has enabled applications to work together via universally accepted communications protocols.

By using EAI tools, analysts can pick and choose automated processes that perform a function within an end-to-end business process, and not have to worry about the details of integrating the processes. However, this doesn't account for the parts of processes that are accomplished by humans. The "Management" part of BPM is a function of how to control the "hand-offs" of information between parts of the business process, whether the function is served by humans or automated services. These hand-offs are controlled by Automated Workflow software. Workflow is prevalent in the HR world to accommodate Employee or Manager Self-Service transactions which require approval. Typically, if an Employee or Manager initiates a Self-Service transaction that requires approval, it is routed to the initiator's supervisor, and, once approved, becomes part of the employee's record. Some types of transactions require multiple levels of approval. In a very basic

sense, these transactions constitute BPM, since the automated system captures and stores the transaction, and routes it to humans who make a business decision to approve it – or not. The automated routing of the approval(s) can save days or weeks compared with traditional paper flow methods of acquiring approval.

In the early days of Web-based Self-Service transactions, managers were dubious of the promise of the role automate workflow played in increased productivity and cost savings. HR Generalists were seen as transaction processors and gatekeepers of the company's personnel information. Self-Service was a way of empowering the Employees and Managers, by giving them ownership of their information, and control over the initiation of transactions against it. Yet Automated Workflow allows controls to remain in place to prevent non-authorized transactions from being processed. The time savings achieved serves the workforce well since transactions are processed faster. And it serves the company well by freeing up HR Generalists from clerical tasks, allowing them to focus on the more strategic tasks of recruiting, retaining, aligning, and developing the workforce. Therefore, Employee and Manager Self-Service has been a transformation agent into the promised land of "Strategic HR." Since those early days, it has become apparent that that there is tremendous cost savings by automating workflow transactions! A recent survey from Gartner Research found that business process improvement topped IT's list of business priorities and near-term expectations of IT[2].

Now that the rules of the game have been established, the challenge becomes how to automate more business processes more effectively. BPM has the following benefits:
- Less lag time between steps in a process
- Formalizing implicit business practices
- Enables process improvement and optimization
- Auditabilty and regulatory compliance
- Promotes better communication between layers of an organization
- Empowers ownership of parts of a business process
- Allows workers to focus on strategic value-added activities rather than clerical tasks

As Business Process Management applications become enterprise-wide, an Organization Modeling solution is essential to enable BPM initiatives to realize their full potential. For example, if a transaction is to be routed to Human Resources for approval (substitute "Finance", etc., depending on the requirements of the business process), a large organization will have different HR people responsible for groups of employees, rather than individual HR people responsible for the whole company. Unless this relationship is captured and maintained, the business process is broken. This is discussed in detail in the January issue of IHRIM Wire[3].

Portal Worklist

When acting on a work item routed for approval, or some other value-added activity, it makes sense that the worklist items appear in a consistent place. For Self-Service users of a Portal-integrated ERP system, this is the Portal Worklist. That is where the worker expects the transaction to appear. An email inbox is not an effective place for a work item to appear, because workers are often besieged by emails, some important and some junk, and it's all too easy to just ignore a work item or lose it amid the "noise." The email inbox is useful for notifications, but not for actionable items. If a worker has to look in multiple places to find the work items on which they are expected to act, it defeats the purpose of having a portal to manage business processes. Thus the portal worklist is the place for all types of actionable items – not just HR Self-Service.

Evolution of Portals

In the early days of the Web, portals were merely a collection of disassociated websites. As portals evolved, they took on a consistent look and feel, added personalization and search capability, and implemented single

sign-on to many of the applications behind them. Thus, the portal knew the user logged in, their access rights, and their preferences. For instance, if a user signed on to the portal, it may display the Employee Self-Service transactions available to her, relevant stock quotes, and the weather in her home town. If she frequently uses the company's accounting system, a link would be provided. If she clicks on the link, she *may* not have to sign in to the accounting system separately. Still, the portal remains folder-dominated, meaning that she needs to know what she wants to work on, and how to navigate to the appropriate link. Hopefully, the portal includes an integrated worklist, which displays all of her work assignments, or transactions awaiting her approval.

Composite applications

Having links to all of the resources available via a mouse click does not mean that the portal is process-oriented, though. Using aforementioned SOA-based technologies it's possible to think about an entire end-to-end business process, which is served by a combination of automated services from different systems, and various people. Composite systems are where portals aggregate disparate "services" for a user into a cohesive business process, with a single user interface. The "services" are parts of systems that have been made available over the Web. Having composite systems sitting behind portals is only part of the picture. The time between human steps in a business process is called "white space." Reducing the white space in a business process is the main driver of return on investment. For instance, let's say a major investment bank just hired a new hotshot investment banker. In some situations, it may take up to two weeks to get fully provisioned – that is, gain access to the resources needed to do the job. Having an expensive investment banker sitting around for two weeks reading the paper is not what many companies have in mind. If that time can be reduced to two or three days, through the electronic routing of workflow approvals, there is an immediate and handsome payoff for the company.

Thus the portal is an excellent place to put composite, process-oriented applications. As portals evolve, it makes sense to arrange them by process, rather than requiring users to search for functions hidden within layers of menus. For instance, if a user indicates to the portal that she is getting married, the portal would be intelligent enough to know that the process of getting married may involve the following transactions:
- Name and address change
- Change of Health & Life Insurance coverage or dependent information
- Requesting time off
- Change in W4 tax status
- Business partnerships the company may have with travel resources, retail, etc.

Supporting content will help guide the user through the many options. The point is that users needn't be aware of the end-to-end process, nor where these transactions are placed on the portal; the portal itself knows this.

The Vision

This vision is known as "the Semantic Web[4]," where Web-based applications understand the meaning (or semantics) behind the information, rather than just the syntax, or how it is to appear. As the technologies which enable the Semantic Web penetrate, portals too will evolve to become ever more helpful to the user. With increased machine understanding, portals will have the ability to predict behavior, based on an understanding of the business process. To illustrate: on a recent business trip, I went to a restaurant for lunch, and ordered a burger and an iced tea. While waiting for my meal to arrive, I thirstily drained my iced tea. Before I could signal the waitress, she was there with the refill. When the juicy burger arrived, I saw that I would need extra napkins. Before I could ask for them, they were delivered to my table. This is an example where the waitress predicted my needs, and acted before I had the opportunity to express them. Imagine the possibilities of a portal predicting what

your next move will be, and initiating the process (but allowing you to maintain in control) before you could take any action!

Until such time, we can enhance the usability of portals by making them process-oriented, rather than system-centric. Begin by thinking of an entire end-to-end business process, rather than the systems required to achieve them. When evaluating portal products, insist on those that are process-oriented, rather than folder-dominated. Look for products that fully support standard technologies, rather than those with proprietary architectures. Pay special attention to designing the user experience when configuring the portal, and work backwards to the technical underpinnings required to achieve it. One of the major advantages of portals is that as you reach a level of maturity with the process, you can replace functionality behind the portal while keeping the user experience unchanged. So the user has a consistent experience while the functionality increases.

As automated systems become more agile and closely aligned with our business objectives, we should be poised to take advantage of them. Competitive advantage can be gained by being aware of trends and considering them in our strategic planning. We can stay ahead of the curve and achieve optimized results through intelligent and *human-oriented* uses of technology.

Footnotes:

[1] P-TRIZ in the History of Business Process-Howard Smith
http://www.bptrends.com/publicationfiles/04%2D06%2DCOL%2D%2DP%2DTRIZ%2D3%2DSmith%2Epdf

[2] IHRIM Wire, March 2007 - http://www.ihrim.org/pubonline/wire/mar2007/Gartner%20EXP%20Survey.pdfhttp://www.ihrim.org/pubonline/wire/mar2007/Gartner%20EXP%20Survey.pdf

[3] IHRIM Wire, January 2007 - http://www.ihrim.org/pubonline/wire/Jan07/orgmod.pdf

[4] For more information on the Semantic Web, please refer to the following link:
http://www.w3.org/2001/sw/

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