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HANDYSOFT: BIZFLOW XML-ENHANCED PROCESS MANAGEMENT AND WORKFLOW

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Abstract

As systems become increasingly more integrated and heterogeneous, the need for a robust workflow approach is becoming steadily more apparent. The new class of 'enterprise workflow solutions' or more increasingly known as Business Process Management (BPM) solutions have coalesced around an set of functionality and performance requirements that meet the needs of an extended enterprise that includes an organization's partners, customers, and suppliers. HandySoft aims to simplify and enable complex intersystem workflow and business process automation through its BizFlow product, which provides a comprehensive set of XML-enabled collaborative tools driven by a powerful process management engine.

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HandySoft

URL: www.handysoft.com	Headquarters: Vienna, VA
Founded: 1991	Funding: Privately-held

Business Process Management and Workflow (2001)

Workflow is increasingly becoming more important and critical to business systems and applications. However, what exactly is workflow? Many organizations, and especially the Workflow Management Coalition (WfMC), define workflow as a system that automates the flow of documents, information, and tasks from one person to another conforming to pre-defined procedures and rules. While initially being implemented as separate tool that implemented the above needs through messaging, current workflow systems serve a more robust and mission critical role in coordinating internal and B2B collaborative processes. As systems become increasingly more integrated and heterogeneous, the need for a robust workflow approach is becoming steadily more apparent.

The new class of 'enterprise workflow solutions' or more increasingly known as Business Process Management (BPM) solutions have coalesced around an set of functionality and performance requirements that meet the needs of an extended enterprise that includes an organization's partners, customers, and suppliers. Some of those functionality and performance requirements include eliminating repetitive processes, reducing the level of IT support required for defining, modeling, deploying and supporting enterprise workflow, compliance with enterprise business rules, global accessibility, interoperability, and adherence to quality standards.

There are numerous products in existence for managing workflow within and external to a company. However, a glance at the major enterprise applications such as SAP, Siebel, and JD Edwards, would reveal that they have poor process management and flow control for workflow-type activities. Some of these software packages claim to contain workflow functionality when in fact they just support sequential routing of documents or processes from one location to another. They do not provide for exceptions, nor can they handle more than one type of data, such as word processing documents, spreadsheets, and image data.

As such, a more robust approach is needed that takes advantage of XML's ability to be interoperable, scalable, globally distributable, and low cost. The end result is a business process and workflow solution that automates different processes for the benefit of an organization's employees, customers, and partners.

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BizFlow

HandySoft aims to simplify and enable complex intersystem workflow and business process automation through its BizFlow product, which provides a comprehensive set of XML and web-enabled collaborative tools driven by a powerful process management engine. BizFlow supports different types of routing, role assignments and groups, multiple deadline settings, exception handling, work-in-progress tracking, different levels of security, and a SOAP broker component to accomplish its tasks. Its approach of using a standard XML and SOAP-based platform for workflow management helps companies of all types and sizes, including companies practicing Six Sigma or ISO 9000 compliancy, to integrate with existing EAI or document management applications.

The BizFlow product is offered in three different editions: BizFlow Pro, BizFlow Pro Plus, and BizFlow Enterprise, each of which offer different levels of process automation and management. BizFlow Pro includes the BizFlow administrator, main process engine, process designer, form designer, application packaged solutions, single-sign-on, and audit and reporting capabilities. BizFlow Pro Plus adds to this Microsoft Project collaboration and PKI integration. On top of this, BizFlow Enterprise offers a configurable user interface, a portal-ready web client, a productivity reporting tool, prepackaged adapters, and Web Service integration in the form of XML and XSL support with BizFlow's own SOAP Broker.

Since many workflow processes are of a secure and confidential nature, it is imperative that enterprise-class BPM tools contain a strong sense of security. BizFlow not only supports 128-bit SSL encryption for all its wire-level communications, but it supports a highly configurable system for setting permissions for viewing and working with workflow folders, stores data on a central server, double password protection, 128-bit encryption of applications and attachments, multiple PKI signatures on one form or page, provides graphical visualizations and indications of security levels, and complies with all FIPS 140-1 PKI requirements.

The BizFlow Process Designer and Form Designer provide a visual interface for simplified process and application development. The product's form designer converts any form or document to an electronic 'smart form' format that can be linked to one or more relational databases through ODBC or ADO. In this manner, the system can produce link to and interface with other applications and legacy systems. The form designer also provides features to add business rules to forms using VBScript. Processes can be linked to another process or sub-process that may be outside the primary workflow domain. As a workflow is being developed it can be tested for accuracy and completeness in order to isolate any missing components before full simulation. Processes that need to be tested can be saved to the production server in a 'test' file, and then transitioned to a 'production' file for release.

BizFlow allows full visibility into running and completed processes through its Audit Trail Monitor, with both graphical and tabular views. This includes drill-down into comments, Digital Signatures, forms, EDMS documents, and other content. BizFlow also allows delegation of administrative capabilities, such as organizational, role, and group management. Additionally, BizFlow's Portal Ready interface can be configured to present to different groups or departments within or external to the enterprise. Easy to use wizards manage all of these features and access is filtered through access rights that provide very powerful and flexible security.

BizFlow Administrator is a web-based client that includes the functionality of BizFlow client, plus additional collaborative administrative tools. It provides a central graphical interface for managing processes, applications, multiple servers (if clustering is used), security, license files, integration to PKI & EDMS systems, and other system administration.

Standards Support

Since XML is such a core part of the way workflow is defined and exchanged, HandySoft is an active member or supporter of a number of workflow and business process-related XML specifications. They are playing an active role in the Business Process Management Initiative (BPMI), and is a member of the UDDI community. The company is also a member of the WfMC (Work Flow Management Coalition), since the group has quickly become established as the primary standards body for BPM and workflow. In general, as BPMI, UDDI, and WfMC standards become developed, they will be incorporated in the BizFlow product.

Customers & Release History

Some of HandySoft's customers include Johnson and Johnson, the US Department of Transport, and the standards body NIST. Johnson & Johnson used BizFlow to assist their capital acquisition process used for buying in which they needed to collect information from multiple parties. Through implementation of BizFlow, they were able to establish and map their purchasing process from start to end while delivering a completed item back to the purchasing group.

The company charges on a per-server and per-seat basis for their product and supports Windows and Unix servers. BizFlow implementations claim rapid results and low maintenance, with usually a 1-to-1 service to product cost ratio – compared to other products that on average require higher service costs.

HandySoft is ISO 9001 and CMM certified. BizFlow is certified Entrust Ready by Entrust, a leading security and PKI vendor. BizFlow also won a 2001 Workflow in Excellence Award sponsored by WfMC and WARIA, which they will receive at the AIIM 2002 in March.

BizFlow experiences competition from a number of sources including other collaborative workflow products that are present in major enterprise software packages, from companies specializing in administrative-type workflow functions such as StaffWare, and integration vendors such as Vitria and WebMethods. They also see some competition from IBM and OpenText in certain environments.

Key Conclusions & Recommendations

- Workflow is a key part of any integration effort and serious, mission-critical solutions should seek to incorporate the set of functionality presented by HandySoft or other vendors in their category.
- Companies investigating using an XML and Web Services-enabled approach to Workflow and BPM should investigate the HandySoft solution.
- As business process management and workflow standards become more solid, HandySoft should seek to incorporate them into the BizFlow product and solution set.

Product Summary: BizFlow (2003)

Since its inception, HandySoft has focused on workflow and business process management solutions that integrate people and systems as part of automated processes. Like most other business process definition and execution tools, HandySoft BizFlow provides a visual tool for business process definition that allows users to quickly lay out the process, assign tasks and roles according to business rules, build subprocesses ('subflows') within the main workflow, and design exception-handling routines. Furthermore, the system allows developers to use

Microsoft Office to create online forms for human participants. These forms can be dynamically populated with data from existing sources and calculations, and can be authenticated via support for digital signatures. Users can also import Visio diagrams and Project files into BizFlow, turning them into dynamic process models that are ready to be deployed.

Designed processes are executed by HandySoft's workflow engine. Participants interact with running processes through a Web-based user interface created from modular blocks of information called BizCoves. Using this interface and others, workflow participants can complete tasks, route work to others when needed, and monitor the progress of a work item. Users can generate real-time reports in graphical and tabular formats that let them see at a glance the status of work, where the bottlenecks are, performance benchmarks, and other parameters, and export these reports to Excel for further analysis.

Key Differentiators

- Strong support for human and document activities
- Support for Microsoft Office as forms editor and document integration solution
- Personalized, role-based user interaction for handling workflow tasks that can be integrated into portals and other presentation-layer or user interface systems
- Ability to import Visio and PowerPoint graphs into process design tool

ZapThink Take

What makes HandySoft's solution most compelling is not just its design, deployment, and management capabilities, but the fact that HandySoft thought about the designer and the user when it put together its business process management system. In particular, the company has an excellent way of handling user interaction through forms, portals, and other human-friendly workflow activity front-ends. As HandySoft increasingly becomes Service-oriented in its approach towards business process management, its unique workflow and user characteristics will continue to differentiate it from the rest of the BPM and Workflow pack.

Profile: HandySoft	(November 2001)
Date Founded: 1991	
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Related Research

- *Web Services Technologies and Trends* Report (ZT-WEBSRV)
- *Service-Oriented Integration* Report (ZTR-WS101)
- *Vitria ZapNote* (ZTZN-0263)

About ZapThink, LLC

ZapThink is an IT market intelligence firm that provides trusted advice and critical insight into XML, Web Services, and Service Orientation. We provide our target audience of IT vendors, service providers and end-users a clear roadmap for standards-based, loosely coupled distributed computing – a vision of IT meeting the needs of the agile business.

ZapThink's role is to help companies understand these IT products and services in the context of SOAs and the vision of Service Orientation. ZapThink provides market intelligence to IT vendors who offer XML and Web Services-based products to help them understand their competitive landscape and how to communicate their value proposition to their customers within the context of Service Orientation, and lay out their product roadmaps for the coming wave of Service Orientation. ZapThink also provides implementation intelligence to IT users who are seeking guidance and clarity into how to assemble the available products and services into a coherent roadmap to Service Orientation. Finally, ZapThink provides demand intelligence to IT vendors and service providers who must understand the needs of IT users as they follow the roadmap to Service Orientation.

ZapThink's senior analysts are widely regarded as the 'go to analysts' for XML, Web Services, and SOAs by vendors, end-users, and the press. They are in great demand as speakers, and have presented at conferences and industry events around the world. They are among the most quoted industry analysts in the IT industry.

ZapThink was founded in October 2000 and is headquartered in Waltham, Massachusetts. Its customers include Global 1000 firms, public sector organizations around the world, and many emerging businesses. ZapThink Analysts have years of experience in IT as well as research and analysis. Its analysts have previously been with such firms as IDC and ChannelWave, and have sat on the working group committees for standards bodies such as RosettaNet, UDDI, CPExchange, ebXML, EIDX, and CompTIA.

Call, email, or visit the ZapThink Web site to learn more about how ZapThink can help you to better understand how XML and Web Services impact your business or organization.

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