

BPMS BUYER'S TOOL KIT



Sample Request for Proposal for a Business Process Management Suite

Part 1 of the complete BPMS Buyer's Tool Kit

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Sample Request for Proposal

The typical RFP for a Business Process Management Suite (BPMS) might contain a long list of checklist items that may do little to clarify the best fit for your BPM project or program.

An RFP that requires a short descriptive paragraph for each answer is a better way to go. It's a bit harder to score than a checklist, but in the end it will give you a clearer profile of the BPMS, and thus get you closer to a good fit to your needs.

Here is a list of 13 evaluation criteria and associated questions that should be on your next BPMS RFP. This doesn't cover every detail, but it can help highlight the key distinctions between available offerings.

1. Architecture and Scalability

What application servers, databases, and programming languages are supported by the product?	
What is a typical number of users in a typical installation?	
Is the solution cloud-ready?	
Are clustering, high-availability, features supported?	
Does the solution support multi-tenancy?	
What Java EE-standard or application server- specific clustering, high-availability, transaction recovery, or security features are supported?	

2. Installation and Development Environment

Describe the development environment. Is it browser-based, Eclipse-based, other?	
Are there different tools for modelers (business analysts) vs developers?	
Describe the installation of the development and production environment(s). Is it closer to a “one-click install” or a multiple DVD set?	
Will a complete development/test environment run on a laptop?	
What out-of-the-box task types or “connectors” are provided with the development environment?	
How much of the solution design requires a highly skilled developer (for example, Java programmer)?	
Describe the capabilities for generating documentation directly from the process model in the development environment. What file formats (Word, Excel, HTML, XML, etc.) are available, how is selection of the content done, and what style formatting (e.g. CSS, XSLT) is available?	
Describe your repository for management of design-time artifacts, including versioning, reuse, and governance. Is the repository for developers, business analysts, or both?	
What data types are supported by the design tool for variables? Describe the support for user-defined data types, including complex structures, e.g. Java classes, XML, etc.	

<p>Can data stored be created directly from the development environment and stored in an external database?</p>	
<p>Can the process model be configured for several different execution environments?</p>	

3. Modeling language: BPMN

<p>Which elements of the BPMN 2.0 descriptive and analytic conformance subclasses are/are not supported by the modeling tool and process engine?</p>	
<p>Describe the event-triggered behavior supported by the process engine, including waiting for an event, interrupting and non-interrupting boundary events, and event subprocesses.</p>	
<p>Can process models (with or without execution-related details) be exported in the BPMN 2.0 XML format?</p>	
<p>Can diagrams created in other tools be imported using BPMN 2.0 XML?</p>	

4. Activity / Task User Interface Design

Describe the tools provided for creating user interface forms.	
What skills are required for user interface form design?	
Can basic forms be autogenerated from activity / task data?	
Can forms be saved and reused?	
Does the form creator tool support Ajax and mouse events?	
Are there any options for rendering task forms (and performing the task) on mobile devices?	

5. Human Task Assignment and Delegation

How do roles and groups integrate with standard directory services (LDAP, Active Directory, etc.)?	
Is task assignment modeling aware of organizational structure, such as a specific performer's "Supervisor" or "Manager?"	
Can tasks be assigned specifically to the same user as a previous task? Can tasks be assigned to anyone but the same user (ie, application of the "4 eyes principle")?	
Can a user delegate a task to another user in real time?	

6. End User Interface

Describe the out-of-the-box process portal (end user experience).	
Is it self-contained or can it run inside a third party enterprise portal?	
To what extent can end users customize the composition and layout of their own user experience?	
What team collaboration features are supported?	
Can configuration be modified in in a deployed process?	
Can the end-user create ad-hoc tasks that don't exist in the process design?	

7. Integration

Describe the configuration of common integration connectors such as databases, web services, email (in and out), file/ftp, http, etc.

What configuration requires point-and-click configuration, what requires short scripts (~10 lines) and what requires custom code?

Is parameter mapping graphical or via code/script? Describe integration with message bus middleware, including third party software.

Describe the various ways a BPMS process may be invoked by an external system, e.g. Java API, REST API, SOAP message, etc.

8. Business Rules

Describe your integration capabilities. What tools can be used to connect to external servers?

How can business rules be included in your solution?

9. Business Activity Monitoring and Operational Analytics

<p>Describe the out-of-the-box and user-designed performance metrics and dashboards, including drilldown from aggregate metrics to individual instances.</p>	
<p>Describe integration of these metrics with reporting tools, including third party tools.</p>	
<p>Describe your integration capabilities. What tools can be used to connect to external servers?</p>	
<p>Describe resource, task, and event parameters supported for performance simulation. Describe the built-in metrics, reports, and charts generated by simulation. Describe integration, if any, between simulation and actual performance data from BAM or process analytics</p>	
<p>Describe how technical errors in deployed processes can be handled.</p>	

10. Openness

How easy is it to replace a BPM suite component with your own third party component, such as task user interface, portal, or BAM?	
What type of integration is required?	
How extensive is the API?	
Can the entire product be embedded inside a custom application with its own look and feel?	

11. Support and Maintenance

Describe support offerings, including options, response time, and cost.	
Describe maintenance, including system setup and performance tuning, remote diagnostics, and on-site support.	
Describe product version migration protocol.	
Take a look at how users, in particular task performers, are administered in the system. How is user administration synchronized with existing enterprise directory services?	
How detailed is the product documentation?	

12. Education and Training

Describe the different training offerings for developers, administrators, and end users.	
List available courses, location and frequency, duration, and cost.	

13. Pricing

Describe the pricing for development tools, e.g. cost per user.	
Describe the pricing, e.g. cost per CPU, cost per user, cost per concurrent user, or fixed price.	
What is the approximate software license price for a “typical” 50-seat system?	
Is monthly or annual per-user subscription pricing available?	

Also in the BPMS Buyer’s Tool Kit:

What to Ask During a BPMS Demo

What to Ask a BPMS Vendor’s Customer References

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