

Adepta BPM for Insurance

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A new era is starting in BPM with the introduction of tools that are tuned for a particular industry sector. One of the players in this is Adeptia, a product not covered in last year's Bloor BPM report. I had a presentation and conference call the other week with Deepak Singh, President / CTO of Adeptia.

Adeptia is based in the Windy City—Chicago. They sell one product in 3 configurations:

- BPM Server.
- Integration Server.
- Transformation Server.

Table 1, from their web site, shows the differences between the 3 product configurations.

Adeptia's approach to Business Process Management can be summarised by the points under the 3 headings of Manage, Automate and Optimise:

Manage:

- Document business processes. (e.g. Helps address SOX requirements).
- Share and collaborate between Business Users and IT developers. (e.g., Business users can define rules for IT staff to implement).

Automate:

- Create individual business user workflow tasks. (e.g., Claims adjusters can be automatically notified of each claim to be processed & appropriate files to be reviewed).
- Create automated system services and activities. (e.g., New Policy or Renewals data can be processed and transformed and sent to PMS without any manual intervention).

	BPM SERVER	INTEGRATION SERVER	TRANSFORMATION SERVER
Description	Integration-Centric BPM Suite. Both Human2Human and System2System flows. Supports full Process Lifecycle.	Complete data integration solution, based on SOA model, for both EAI and B2Bi scenarios. System2System flows only.	ETL product focused on data aggregation and transformation. Ideal for BI & Data warehousing needs.
Design-time users	Business Analysts & Developers	Business Analysts & Developers	Business Analysts & Developers
Business Users	Yes	Yes, for error handling	Yes, for error handling
Process Engine / Designer	Yes	Yes	Yes
Services Repository	Yes	Yes	Yes
Human Workflow	Yes	-	-
Process Simulation	Yes	-	-
Business Rules Engine	Optional	-	-
Reports & Dashboard	Yes	-	-
Web Services	Yes	Yes	-
Data Transport	Yes	Yes	Limited
Events	Yes	Yes	Limited
Schema & Metadata	Yes	Yes	Limited
Data Mapping	Yes	Yes	Yes
Exception / Error Handling	Yes	Yes	Yes
Upgrade path	Single install, Product upgraded based on license key only		
Typical Solutions	<ul style="list-style-type: none"> » Business process improvement and optimization » Document and model business processes » Automate workflows » Manage business rules » Automate industry and business regulatory compliance 	<ul style="list-style-type: none"> » Enterprise Application Integration (EAI) » Exchange data with external partners (B2Bi) » SaaS integration » Services and adapters for SOA » Connect Portals with back-end systems 	<ul style="list-style-type: none"> » Extract, Transform and Load (ETL) » Data mapping and transformation » Data conversion and migration » Metadata dictionary » Data hubs, data marts and data warehouses

Table 1: Comparison table

- Implement execution of process flows with real-time or batch triggers. (e.g., Real time access to accounting application for presenting current information to customers).

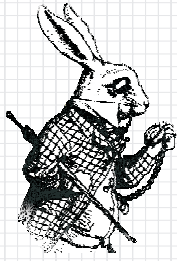
Optimise:

- Track and monitor processes in-flight. (e.g. Load balance work effort of claims adjusters).
- Analyze post-completion logs and reports to identify bottlenecks.
- Enhance and improve performance.

Users create a Process Flow by defining a business work flow. A Process Flow is a sequence of tasks or "Services"

that represent a work flow. Each Service is an executable component of code and may be a local Adeptia service or external (Web Services, (Java, .NET, CORBA etc.). Non-Java code components can be specified as a Service by utilizing an Adeptia toolkit. Complex workflows available include decision nodes, loops, forks and joins, transaction wide global parameters etc. The Process engine supports human interaction, async triggers, long-running transactions.

Adeptia includes an open-source Reporting Engine—JasperReports—to generate PDF and HTML reports. The Reporting Service generates reports as part of process flow and



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supports sharing and distributing reports automatically. There is a Web-based dashboard view which can also be used for Real-time updating of graphs and graph design. There is an in-flight Process Monitoring, which views current and prior process transactions.

The Process Simulator supports both "Activity Based Costing" and "Timing/Effort Analysis". The approach is for resource costs to be assigned and then saved for reuse.

The Process Flows are then designed and modeled and resource units are to activities, effort units to activities and probabilities to decision nodes. The number of runs is then entered before the simulation is run. Results show average case, best case and worst case costs and effort. Average, Best and Worst paths are shown for analysis. PDF reports are generated for simulation results. Scenarios can be saved for sharing and later analysis.

The Adeptia Process Engine is a State machine that is best suited to long-running transactions. There is support for clustering of multiple nodes and also a Job Queue to manage transaction spikes. The engine supports both Control Flows and Data Flows, as well as 2-phase commit, transaction roll-back and recovery.

The Adeptia Process Designer is BPMN-compliant and generates PF XML. There is a BPEL Import-Export facility. The Designer is Web-based and synchronizes with Services repository.

Adeptia provides support for wide-variety of protocols, including:

- HTTP/S
- FTP, SFTP
- Email: SMTP, POP3, IMAP
- JMS, JCA
- Databases: SQL, Oracle, DB2, MySQL etc.

On the Web Services front, Adeptia supports both WS Consumer / client and WS Publisher / provider modes.

There is support for wide-variety of data formats, including:

- Text, Flat file, CSV
- MS Excel
- XML
- EDI
- AL3, HL7 etc.
- Databases: SQL, Oracle, DB2, MySQL etc.

New schemas can be created and the Metadata repository can be used to reuse schema objects.

Adeptia Business Process Management (BPM) for Insurance solution has been developed to address the following three areas:

- Improve business processes: Automate workflows that involve lot of manual tasks. Many functions performed by business analysts such as data entry, validations and corrections can be automated so the analysts are only required to intervene for handling errors and exceptions

- Agency Carrier interface: Make it easier and more efficient for agents to work with the carrier by offering automated upload and download of policy information in real-time. This simplifies the process of working with new agents, enabling creation of new business opportunities.
- Connect back-end applications: Seamless integration and data flows between policy management systems, rating packages, claims applications and accounting leads to elimination of re-keying of data. This reduces errors, improves data quality, enables up-to-date reporting and provides a better view of the business

Like all BPM tools, Adeptia provides a code free generation environment leading to lower development costs. However the addition of its industry knowledge means that pre-built services, industry standard data formats and industry standard process flows see Adeptia claim a 50% reduction in development time. If you are in the insurance industry and looking at introducing BPM then this tool should certainly be on your list for review. The only draw back is the need for Adeptia to extend their penetration outside of the US as their channel has at present only a limited number of partners.

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