

CORTICON PROFESSIONAL SERVICES OFFERINGS

PRODUCT TRAINING

- Timing:** Recommended for all participants prior to starting rule-based application development with Corticon Business Rules Management products.
- Duration:** 3-4 days per group or team of end-users
- Description** A series of 4 end-user product courses delivered by Corticon's most experienced consultants. Our trainers are actual users and implementers in addition to teachers, so they know how to solve the most complicated problem or answer the most detailed question. With their practical experience, they also know how best to use rules in real-world projects.
- *RM01 – Introduction to Corticon Studio.* This course provides the user with an overview of the business rule lifecycle and the means to model and manage rules produced by it. This course is presented through a combination of lecture and a hands-on lab covering basic aspects of Corticon Studio, giving students direct experience with the software. 1 Day.
 - *RM02 – Advanced Studio Concepts.* This course provides the user with the foundation necessary to create complex Rule Sets. The course is presented through a combination of lecture and a hands-on lab in order to improve students' familiarity and comfort with Studio. 2 Days.
 - *RD01 – Deploying Web Services.* This class provides the necessary foundation to install, deploy, integrate, invoke, and troubleshoot the Corticon Business Rules Server as a Web Services server. 1 Day.
 - *RD02 – Deploying Java Services.* This class provides the necessary foundation to install, deploy, integrate, invoke, and troubleshoot the Corticon Business Rules Server as a Java server. 1 Day.

APPLICATION DESIGN & ARCHITECTURE FOR RULES

- Timing** During the application design process, always prior to Rule Modeling and often prior to Discovery. Customer participants should receive RD Training prior to this phase.
- Duration** Corticon recommends 1-2 weeks of involvement in this phase, depending on availability of customer architects and application design stability.
- Description** Corticon Professional Services technical architects work with customer architects to determine how best to incorporate externalized decision services into the application or process. Considerations include:
- type and quantity of decision points in an application or process
 - desired application or process performance and service levels
 - ease of decision maintenance
 - requirements for decision reusability
- The outcome of this process is a Decision Service Manifest, detailing key decisions, integration points, modularity, and high-level decision service interfaces. This Manifest, combined with the rules captured during Discovery, is a primary input into the Modeling phase.

BUSINESS RULE DISCOVERY & ORGANIZATION

- Timing** Project start. Customer participants should receive RM Training prior to this phase.
- Duration** Corticon recommends 1-6 weeks of involvement in this phase, depending on project scope, availability of customer domain experts, requirements stability, etc.
- Description** Corticon Professional Services staff uses a proven, rule-centric methodology to mine and capture business rules from various corporate sources, including:
- reviewing and analyzing of business requirements and specifications, if any
 - interviewing subject matter experts
 - analyzing existing policies and procedures
 - reviewing existing applications, user interfaces, or forms
 - mining and reverse-engineering code
- Following capture, individual rules are organized into discrete decisions based on the organization suggested by the Decision Service Manifest (see below). Discovery & Organization may be initiated prior to Corticon purchase, training, or installation.

VOCABULARY DESIGN & DATA ANALYSIS

- Timing** Project start. Typically prior to Rule Modeling and concurrent with Discovery. Customer participants should receive RM Training prior to this phase.
- Duration** Corticon recommends 1-3 weeks of involvement in this phase depending on existence, availability, and complexity of enterprise data models.
- Description** Corticon Professional Services analysts examine the rules discovered to determine which elements of existing data models and schemas are required as elements of the Business Rule Vocabulary. The Vocabulary becomes the central business data dictionary used in all subsequent modeling, testing and integration activities. Inputs to the Vocabulary include
- database schemas, object models, and existing data dictionaries
 - forms or other types of structured data (EDI messages, etc)

BUSINESS RULE MODELING, ANALYSIS, AND TESTING

- Timing** Following Rule Discovery and Vocabulary Design phases. Customer participants must receive RM Training prior to this phase.
- Duration** Corticon recommends a minimum of 2 weeks of involvement in this phase, depending on availability and readiness of customer's rule modeler resources.
- Description** Corticon Professional Services begins the process of implementing in Corticon Studio the rules captured and organized during Discovery. While some customers engage Corticon PS to perform this work in its entirety, we prefer to work closely with the customer's designated rule modelers and build rules together. This approach helps new rule modelers apply the lessons of training and gain important experience while under the mentorship and guidance of our expert staff. When Corticon PS completes the engagement, the customer has the in-house capacity to build and maintain their rule-based applications and processes. Activities in this phase include:

- creating sets of business rules in Corticon Studio
- performing full logical analysis of rule sets for conflicts, gaps, redundancies, and loops
- resolving identified problems according to business intent
- creating use cases and test scenarios to validate rule set functionality
- creating rule templates to simplify future maintenance

INTEGRATING RULES IN APPLICATIONS AND PROCESSES

Timing following Business Rule Modeling. Customer participants should receive RD Training prior to this phase.

Duration Corticon recommends 1-3 weeks of involvement in this phase since the methods used are standardized and repeatable by customer's web services or Java architects.

Description Corticon Professional Services developers assist customer's IT staff in the integration of new decision services into the application or process. This phase is the practical implementation of concepts and topics covered in RD training, so our goal is to help the customer's IT staff become self-sufficient in such tasks as:

- understand and generate service contracts with the Corticon Deployment Console
- recommend best practices for invocation and integration of Decision Services
- provide expert support with APIs and supported interfaces

DEVELOPING AND SUSTAINING A RULE CULTURE

Timing Project independent, although organizations benefit most from this assistance prior to commencing new rule-based application development.

Duration Corticon recommends 2-3 weeks of involvement in this aspect, depending on organizational maturity, skill sets, alignment of leadership, and strength of mandate. Subsequent and periodic follow-up, progress, and health checks are also recommended.

Description Using business rules effectively is more than a matter of learning a new piece of software. Customers receiving the highest return on their investment in rules have also refined their organizations to improve requirements definition processes, increase business involvement in application development and maintenance, and improve communication between business and IT groups. Corticon Professional Services can help an organization embrace the cultural implications of a rule-based approach to application development through:

- prepare job descriptions, recommend skill sets, assist in selecting rule modelers
- analyze rule sources for completeness and quality
- recommend best practices for change management and control
- review requirements definition, review, and management process
- recommend organizational adjustments to support rule-based approach