

TRM RulesManager™ SE

GETTING STARTED

The purpose of this document is to help you get started using RulesManager™. It is meant as a guide, but is not necessarily set in stone. These are common items that the majority of RulesManager™ consultants go through when implementing new business rules.

Identify Potential Business Rules

The first step to any new RulesManager™ installation is to identify potential business rules for the system. Identifying new business rules can come in many forms, from a user request to a system design flaw. This process can sometimes be the most difficult part of an implementation. Below are some questions that can be used to help with the process.

What does Maximo® not do that you wish it did?

This needs to be thought about in broad terms (I wish it had an application for tracking DVD Rentals) as well as narrow terms (I wish it would require this field when I do this). These will often be found during the implementation process of your Maximo® system. Maximo® itself is a great system with a very flexible architecture. The point of this question is to ask yourself: where does the standardized functionality need to bend a little for my organization?

What are some pain points of your end-users?

One thing that many organizations tend to overlook is the user population. The fact of the matter is, if the users don't like the system, they aren't going to use it. They will find a way to make their use of the system as minimal as possible. This is why addressing the pain points of the users is vital to the success of the overall system implementation.

Where are some frequent data-input errors?

Data input directly affects the reporting capabilities of the system. If incorrect data is input into the system, incorrect data will be pulled out of the system. This question is designed to force a systematic analysis of the data contained in the system to identify where and what type of validation needs to occur.

What parts of a business process can be automated?

There are some parts of business processes in an organization that just don't or shouldn't require human intervention. For instance, if a certain record type always has the same values input into several fields, why make the user fill that information out? Have it automated when they choose the record type. This can also be used to identify inefficiencies in a business process and ways to improve those inefficiencies through automation.

Are there any security-related business rules?

Think about the user base and the roles of your users, supervisors, and managers. What types of records can each not view? What fields are they restricted from viewing or even modifying? This tip is designed to get a critical analysis of specific user roles within the company. Ensure that users get the information they need, but not the information they don't need.

Are there any industry compliance concerns?

Does your organization have any industry compliance regulations to which they must adhere? If not, what about corporate policies? These could be security-related policies, data standardization, visual standardization, or auditing capabilities.

Analyze and Develop Potential Rules

Now that you have a good sense of the business rules you want to put into the system, begin to analyze and further develop each one. Several checkpoints should be passed in order to ensure that this is a viable candidate for inclusion into your system.

Ensure that the business rule makes good business sense. This means to make sure the rule going to improve something about the system. It doesn't make sense to implement a rule that will have a negative impact. This also includes making the rule meet any corporate guidelines, regulations, or compliance issues that your organization must meet.

Make certain that the rule is technically feasible and possible. There is no point in developing a rule further if it isn't possible to accomplish. As much as we'd like our system to turn on the coffee pot and make a cup of coffee for us, it isn't technically possible.

It is vital that the business rule be developed fully. Think of all possible scenarios where the rule can cause an impact. A simple rule can often turn into a complicated one when thinking about the many exceptions to the business rule. Doing this at this point will save actual development time when the rule is being written.

Finally, in order to get the full benefits out of a rule, make sure that you can calculate a measurable value the rule will add to your system. For example, "This business rule will save us three minutes per call in our call center". This is important at a later stage when you are measuring the effects of the rule on your system once implemented.

Write, Test, and Implement

Now that the full requirements of the rule have been developed, the actual development of the rule becomes very easy. Write the business rule to match the defined requirements in a development environment. Once the developer has developed the business rules, they should be moved to a testing environment to test the rules as designed. It is important to have users test the business rule as well in the test environment.

Once the business rule has been written and tested, and has passed all user and development tests, move the rule to the production environment. Once it has been moved to the production environment, it should be tested again to make sure it is working as it was designed and meets the requirements that were defined.

About Total Resource Management

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