

Agility Through Business Rules Management

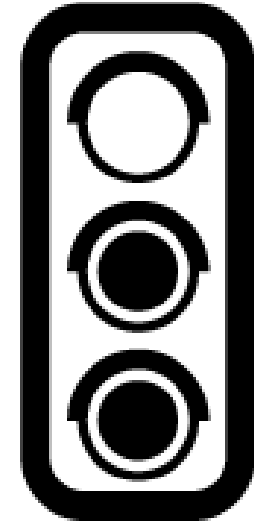
Progress Corticon

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PROGRESS
EXCHANGE 2014

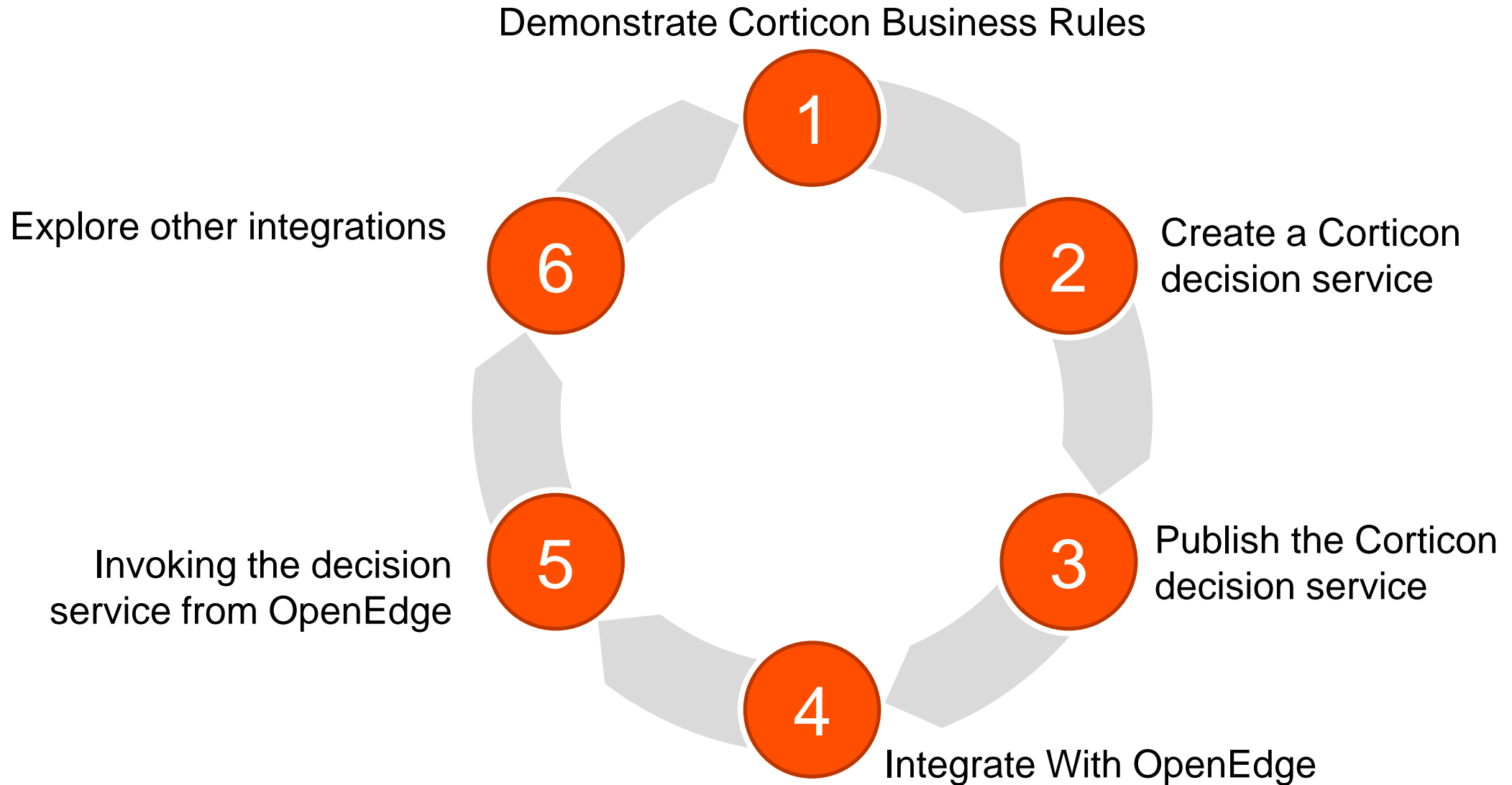
Today's Goals

- Understand Corticon Business Rules
- Build an Example Decision Service
- Integrate With an OpenEdge Application
- Discuss Corticon & OpenEdge Integration Features
- Learn About Additional Discovery Resources



Business
Rules

Progress Corticon – OpenEdge Business Rules Management **Workshop**



A close-up photograph of a coin-operated binocular viewer. The viewer has a silver, textured metal body. At the top, there are two eyepieces and a red circular button with the text "TURN TO CLEAR VISION". Below the eyepieces is a coin slot with a "25¢" coin inside. A small plaque on the left side of the viewer reads: "U.S. Manufactured and Distributed by THE TOWER OPTICAL COMPANY, INC. P.O. Box 251 South Norwalk, CT 06855". A larger instruction plaque at the bottom right reads: "TO OPERATE LONG RANGE BINOCULARS 1. DROP COIN IN SLOT. 2. PULL HANDLE DOWN ALL THE WAY-LET GO 3. TO CLEAR VISION - TURN RED KNOB." The background is a blurred view of a lighthouse on a rocky shore under a cloudy sky.

Understanding Corticon Business Rules

Corticon enables organizations to make better, faster decisions by automating business rules

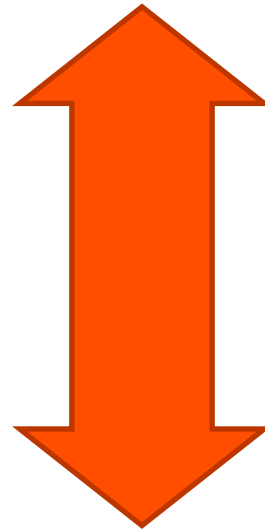
Should Credit be Extended?



Do not provide credit to delinquent accounts

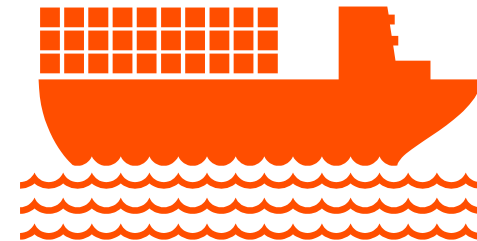
Senior officer approval required for loan amounts greater than \$100,000

DECISIONS



RULES

How to Plan a Shipment?



Hazardous materials must be shipped in double hull tankers

Class 7 super tankers require a minimum berthing distance of 300 ft

What Is Corticon Business Rules Management?

Software to help make the **Right Decision at the
Right Time with **Business Agility****

	Should we pay this claim?
	What offer should we make, now?
	What resource should we allocate?

The Problem: Automating Business Rules

Traditional approach is programming-based

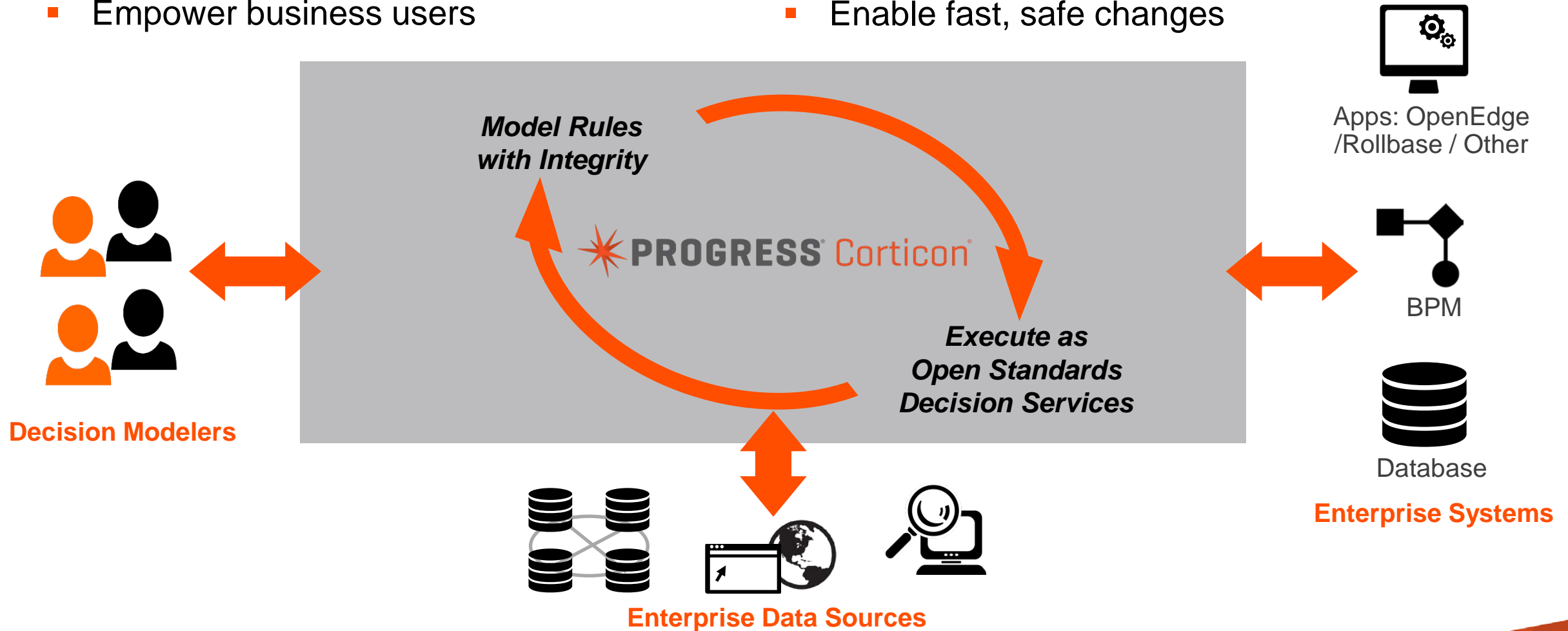
- Simple rules difficult to automate, sophisticated ones impossible
- Single change can impact hundreds of rules/processes



There is a better way...

The Solution: Progress Corticon Business Rules Management System

- Separate decision logic from code
- Empower business users
- Ensure performance & scalability
- Enable fast, safe changes



Corticon Differentiation

Model-driven
Development

Automate rules
without coding

Ease of use

Guaranteed Rules
Integrity

Ensure safe changes

Reliable

DeTI (Design Time
Inferencing) Engine

Market-best performance
and scalability

No bottlenecks

Model-Driven Rules Development

- **Out-of-the-box ready for use by**
 - Business Analysts
 - IT Professionals
- **Patented Excel-like modeling tool**
 - No programming
 - Business friendly
 - **Natural text**
- **One-click deployment**

The screenshot shows the Progress Model-Driven Rules Development tool interface. It includes a 'Rule Vocabulary' pane on the left with a tree view of business objects like 'Patient', 'a1_diagnosis_test', 'age', etc. The main workspace displays a rule named '*diabetes_rule_Diabetes_Treatment_Plan.ers' with a table of conditions and actions. An orange callout points to the conditions table, stating 'Rules are constructed with drag-and-drop ease'. Another orange callout points to the vocabulary tree, stating 'Vocabulary consists of your business objects/terms'. A third orange callout points to the 'Rule Statements' pane at the bottom, which provides natural language documentation for the rules, stating 'Rule Statements provide rule documentation and traceability'. A fourth orange callout points to the 'Rule Operators' pane on the left, which shows a library of operators like 'and', 'or', '=>', etc., stating 'Comprehensive, extensible library of operators (akin to Excel functions)'.

	1	2	3	4	5
a	Patient.risk	'high'	'low'	-	-
b	Patient.recommendation	'treat immediately'	'observe'	-	-
c	Patient.a1_diagnosis_test	-	-	T	-
d	Patient.blood_pressure	-	-	> 130	-
e	Patient.cholesterol_level	-	-	> 5	-

	1	2	3	4	5
A	Patient.treatment_plan	'low dosage thizide diuretics'	'low dosage beta blockers'	'immediate hospitalisation'	-

Alias	Text
Patient	A low dosage of thizide diuretics is required for a patient who is high risk and who needs to be treated immediately.
Patient	A low dosage of beta blockers is required for a patient who is low risk and who needs to be reevaluated over the next two weeks.
Patient	Patient needs to be hospitalised immediately if diagnosis test A1 is positive, blood pressure is over 130 and cholesterol level exceeds 5.

Proven with the most sophisticated business problems

Full Transparency of Rules – No Technical Language

***MedicalHistory.ers**

Conditions	0	1	2	3	4	5
a Applicant Cholesterol Level	-	<= 240	<= 250	<= 280	<= 280	<= 280
b Total Cholesterol to HDL (high density lipoprotein) Cholesterol Ratio	-	0 .. 5.0	0 .. 6.5	0 .. 7.5	0 .. 7.5	0 .. 7.5
c Applicant does hazardous activities	-	F	-	-	-	-
d Applicant has 1 parent with heart disease or cancer.	-	F	F	-	-	-
e Applicant has 2 parents with heart disease or cancer.	-	F	F	F	F	F
f Applicant has siblings with heart disease or cancer.	-	F	-	-	-	-
g Has Applicant been driving under influence in the past 24 months?	-	F	F	F	F	F
h Has Applicant been driving under influence in the past 60 months?	-	F	F	-	-	-
i How many violations of the law as a driver of a vehicle while in motion were committed by the Applicant in the past 3 years?	-	< 3	< 3	< 3	< 3	< 3
j Does Applicant have any physical or mental impairments?	-	F	-	-	-	-
k		T				
l		T				
m		F				
n		F				
o		F				
p		F				
q		< 140				
r		-				

Progress | Corticon

Report Date: 30 September 2013 13:27:30 CEST

Work Document Entity:
Version Label:
Major Version: 1
Minor Version: 0
Effective Date:
Expiration Date:
Total Number of Rules: 6
Comments:

Flow of Activities:

Step	Parent	Activity	Type	Path
1		Check Medical Patient History	Rulesheet	C:/Users/verlee/Progress/CorticonWork_3.3/SEI/CcServerSandbox/DoNotDelete/DecisionServices/U0138

Rulesheet: Check Medical Patient History

Processing Mode: Optimized Sequential

Invalid:
Disabled:
Rules:

Rule Number: A0

Actions	Value
The age of the Applicant is calculated based on the difference between his/her birthday and today's date.	X

Rule Number: 1

Conditions	Value
Applicant Cholesterol Level	<= 240
Total Cholesterol to HDL (high density lipoprotein) Cholesterol Ratio	0 .. 5.0
Applicant does hazardous activities	No
Applicant has 1 parent with heart disease or cancer.	No
Applicant has 2 parents with heart disease or cancer.	No
Applicant has siblings with heart disease or cancer.	No
Has Applicant been driving under influence in the past 24 months?	No
Has Applicant been driving under influence in the past 60 months?	No
How many violations of the law as a driver of a vehicle while in motion were committed by the Applicant in the past 3 years?	< 3
Does Applicant have any physical or mental impairments?	Yes
Applicant was resident in the US in the past 2 years?	Yes
Applicant was resident in the US in the past 3 years?	Yes
Did Applicant abuse any substances in the past 10 years?	No
Did Applicant abuse any substances in the past 7 years?	No
Did Applicant use tobacco in the past 12 months?	No
Did Applicant use tobacco in the past 36 months?	No
Spontaneous bacterial peritonitis ratio	< 140

Actions

Value
The risk classification assessed based on medical history is
Preferred Plus

Overrides

Id	Post	Alias	Rule Statement's
1	Info	Applicant	Applicant qualifies for Preferred Plus risk class based on medical history.

Overrides

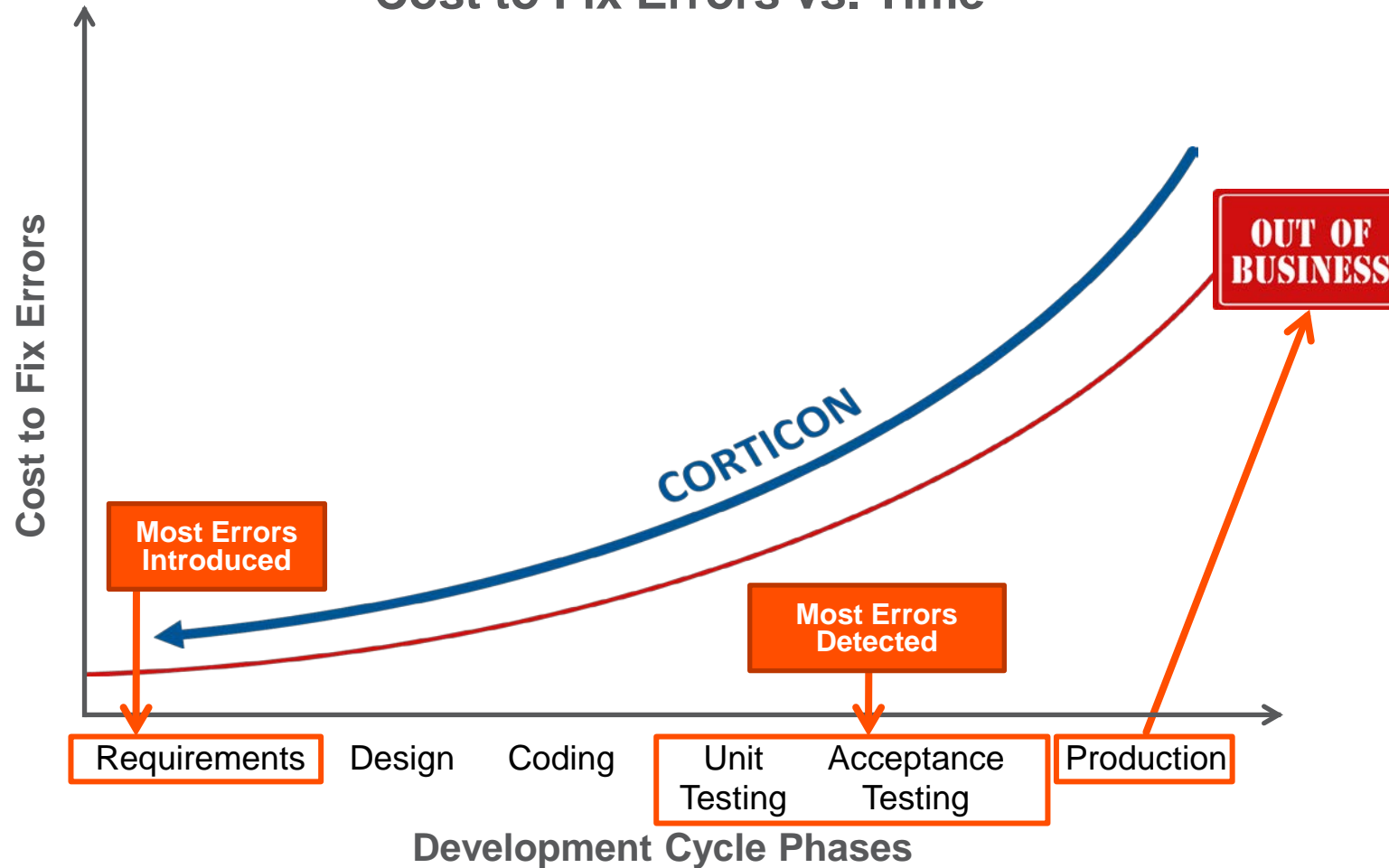
Value
{2, 3, 4, 5}

Clearly documented rule conditions and actions in normal human readable text helps understand the rules (think: non-technical users) and provides full transparency (also available in HTML rule reports)

Guaranteed Rules Integrity

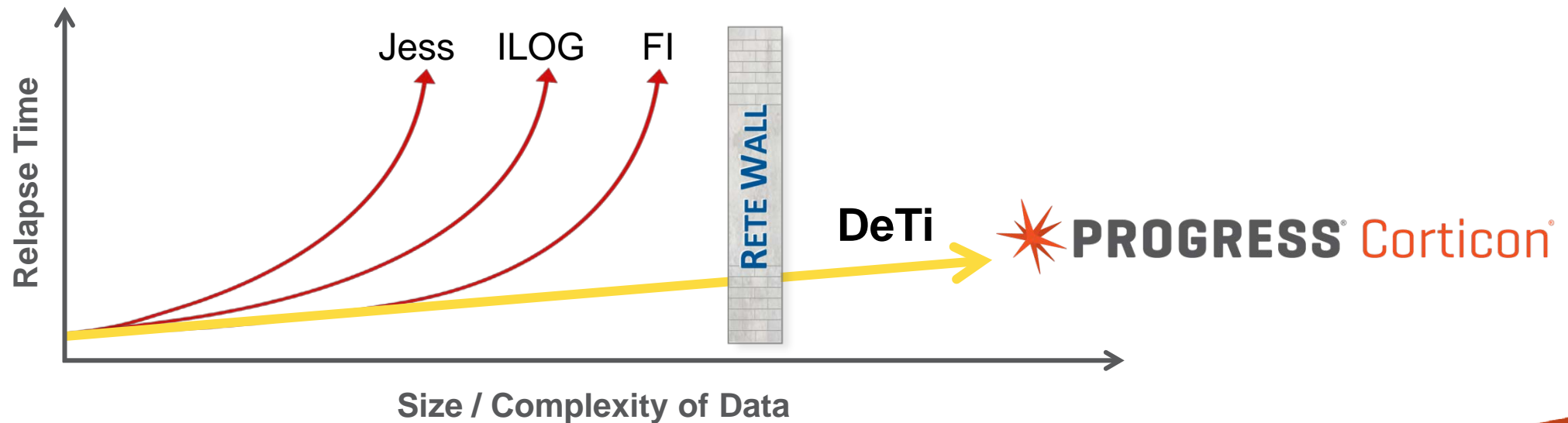
The right decisions at the right time – *guaranteed*

Cost to Fix Errors vs. Time



Performance & Scalability

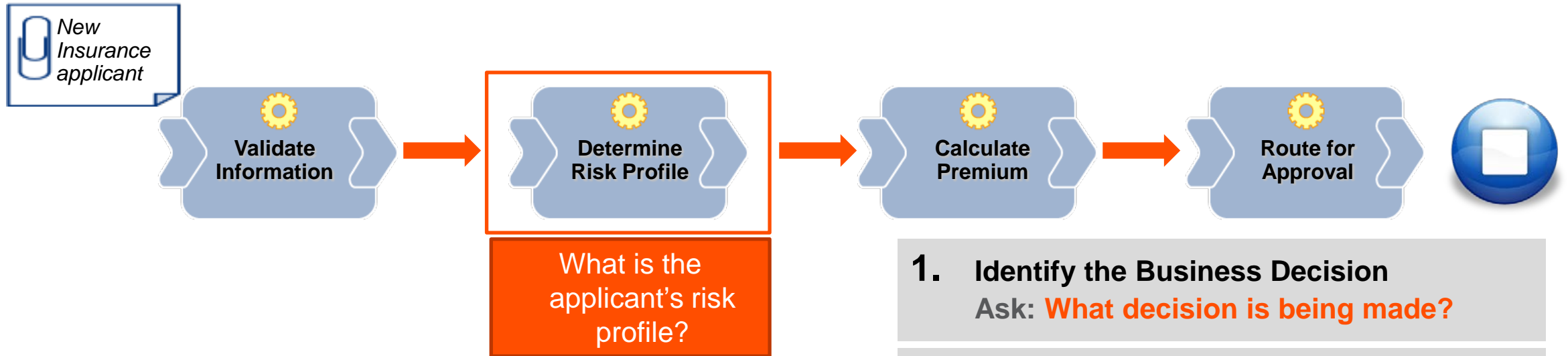
- Traditional pattern matching algorithm is Rete
 - Scales well with increasing number of rules
 - Degrades exponentially with increasing complexity of data – the “Rete Wall”
- Corticon’s patented DeTi (Design Time) algorithm
 - Scales linearly with number of rules and complexity of data



A photograph of three business professionals in an office setting. A man in a dark suit and blue tie is leaning over a laptop on the left. A woman in a grey blazer and white shirt is in the foreground, looking at the laptop and holding a pen. A man with grey hair in a dark suit and patterned tie is in the background, also looking at the laptop. An orange semi-transparent banner is at the bottom.

Demo – Build an Example Decision Service

Demonstration



1. Identify the Business Decision

Ask: **What decision is being made?**

2. Identify the Business Rules

Ask: **How do you make the decision?**

3. Model the Business Rules

Use: **Corticon Studio**

SAMPLE RULES

- Applicants who skydive have a High Risk rating
- Applicants under 35 have a Low Risk rating

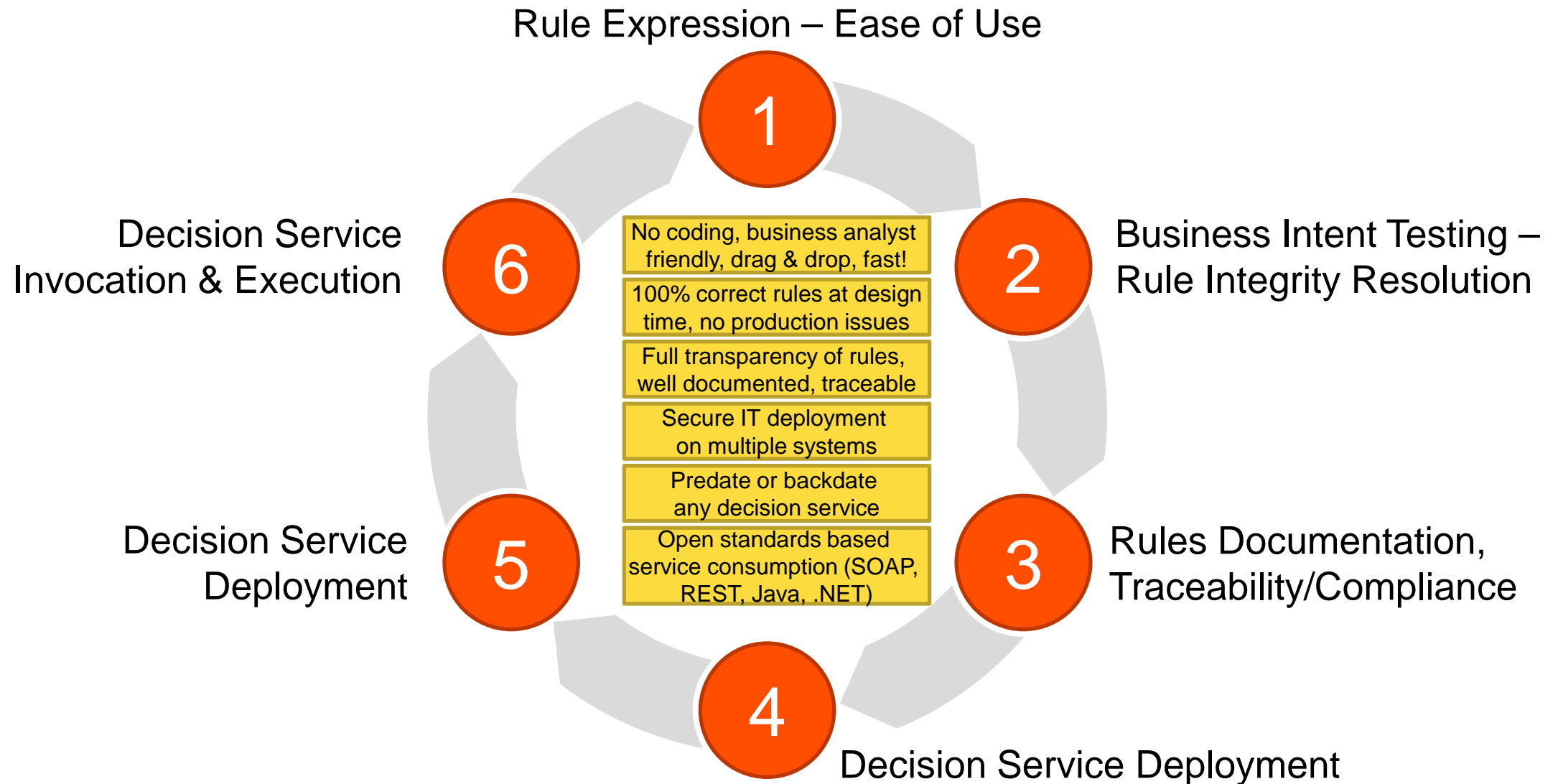


OpenEdge ABL Coding: 35 Lines of Code for 4 Business Rules!

```
DEFINE INPUT PARAMETER isSkyDiver AS LOGICAL NO-UNDO.  
DEFINE INPUT PARAMETER applicantAge AS INTEGER NO-UNDO.  
DEFINE INPUT PARAMETER parmCurrency AS CHARACTER NO-UNDO.  
DEFINE INPUT PARAMETER parmAge AS INTEGER NO-UNDO.  
DEFINE INPUT PARAMETER parmIncome AS INTEGER NO-UNDO.  
DEFINE OUTPUT PARAMETER ruleStatement AS CHARACTER NO-UNDO.  
  
DEFINE VARIABLE riskRating AS CHARACTER NO-UNDO.  
DEFINE VARIABLE totalPremium AS DECIMAL NO-UNDO.  
  
IF isSkyDiver THEN  
DO:  
ruleStatement = "Warning" + CHR(1) + "Applicants who skydive have a high risk rating regardless age."  
riskRating = "High".  
totalPremium = 150.  
ruleStatement = ruleStatement + CHR(3) + "Info" + CHR(1) + "Applicants who are " + riskRating + " risk pay a premium of " + parmCurrency + STRING(totalPremium) + ".".  
RETURN.  
END.  
ELSE  
DO:  
IF applicantAge < parmAge THEN  
DO:  
ruleStatement = "Info" + CHR(1) + "Applicants less than " + STRING(parmAge) + " years of age have a low risk rating."  
riskRating = "Low".  
totalPremium = 50.  
ruleStatement = ruleStatement + CHR(3) + "Info" + CHR(1) + "Applicants who are " + riskRating + " risk pay a premium of " + parmCurrency + STRING(totalPremium) + ".".  
RETURN.  
END.  
ELSE  
DO:  
ruleStatement = "Info" + CHR(1) + "Applicants who are " + STRING(parmAge) + " year or older and don't skydive are medium risk."  
riskRating = "Medium".  
totalPremium = 100.  
ruleStatement = ruleStatement + CHR(3) + "Info" + CHR(1) + "Applicants who are " + riskRating + " risk pay a premium of " + parmCurrency +  
STRING(totalPremium) + ".".  
RETURN.  
END.  
END.
```



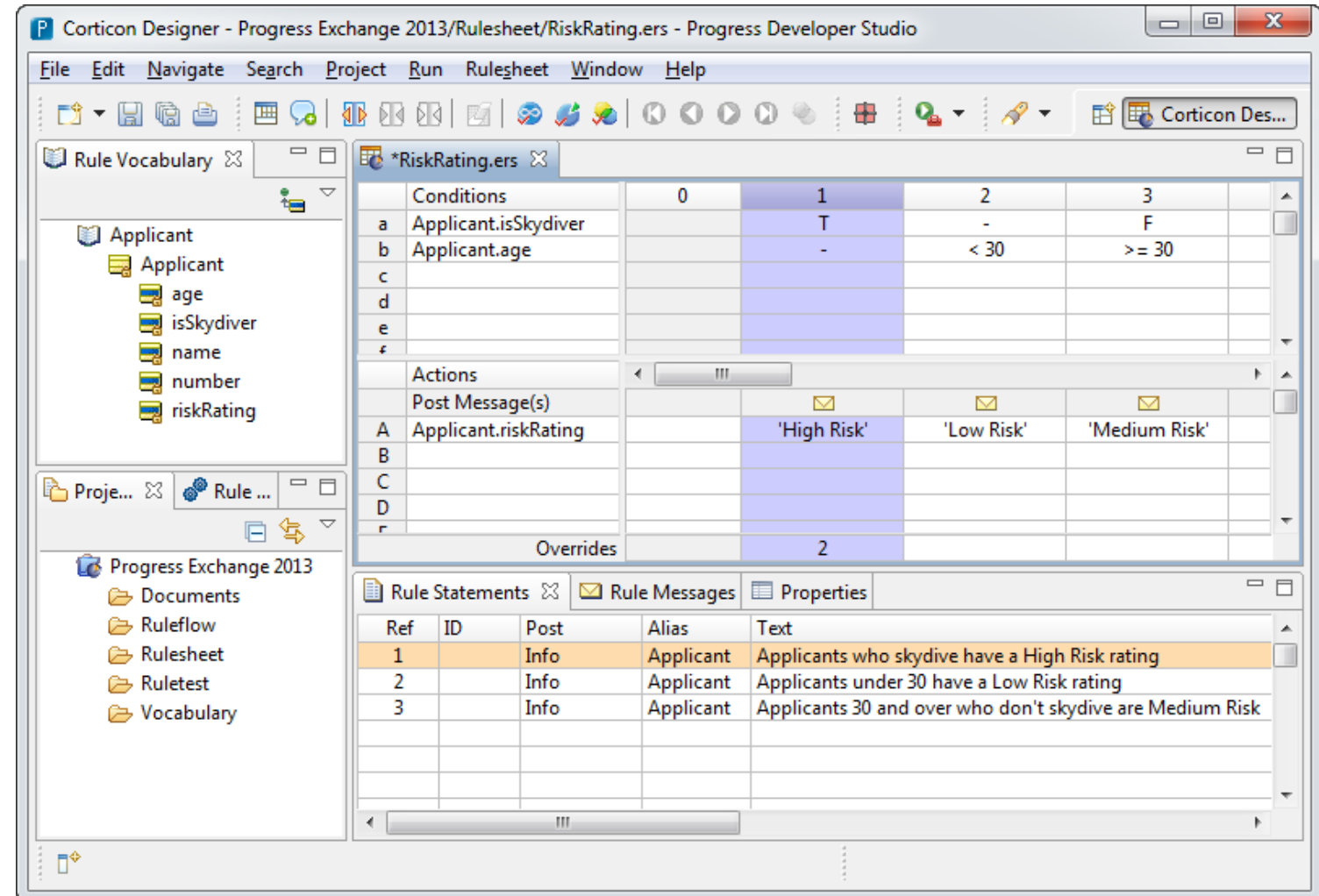
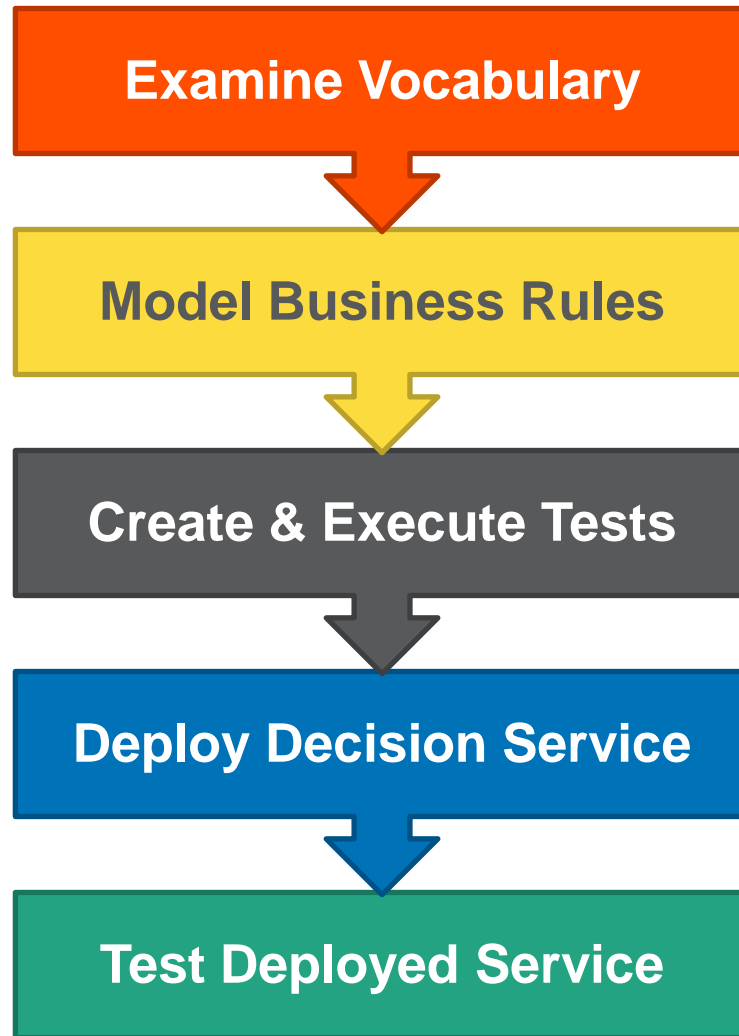
Corticon Decision Development Scenario



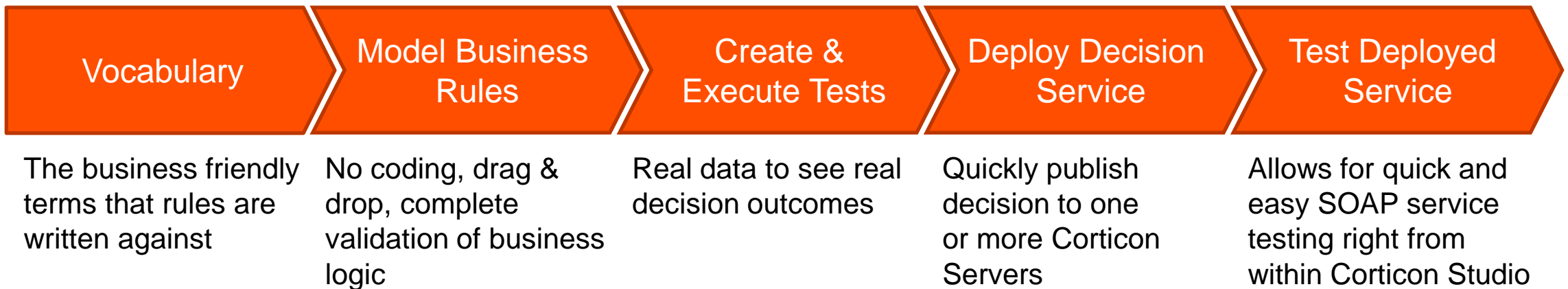
A man with glasses and a beard is shown from the chest up, looking directly at the camera. He is wearing a grey hoodie and has his hands on a keyboard. The background is a dark blue gradient with vertical streams of glowing blue binary code (0s and 1s) falling, reminiscent of the 'Matrix' effect. An orange horizontal band is overlaid across the middle of the image, containing the text 'Hands on Workshop' in white.

Hands on Workshop

Exercise 1: Model Corticon Decision Service (60 Minutes)



Review Exercise 1: Model Corticon Decision Service

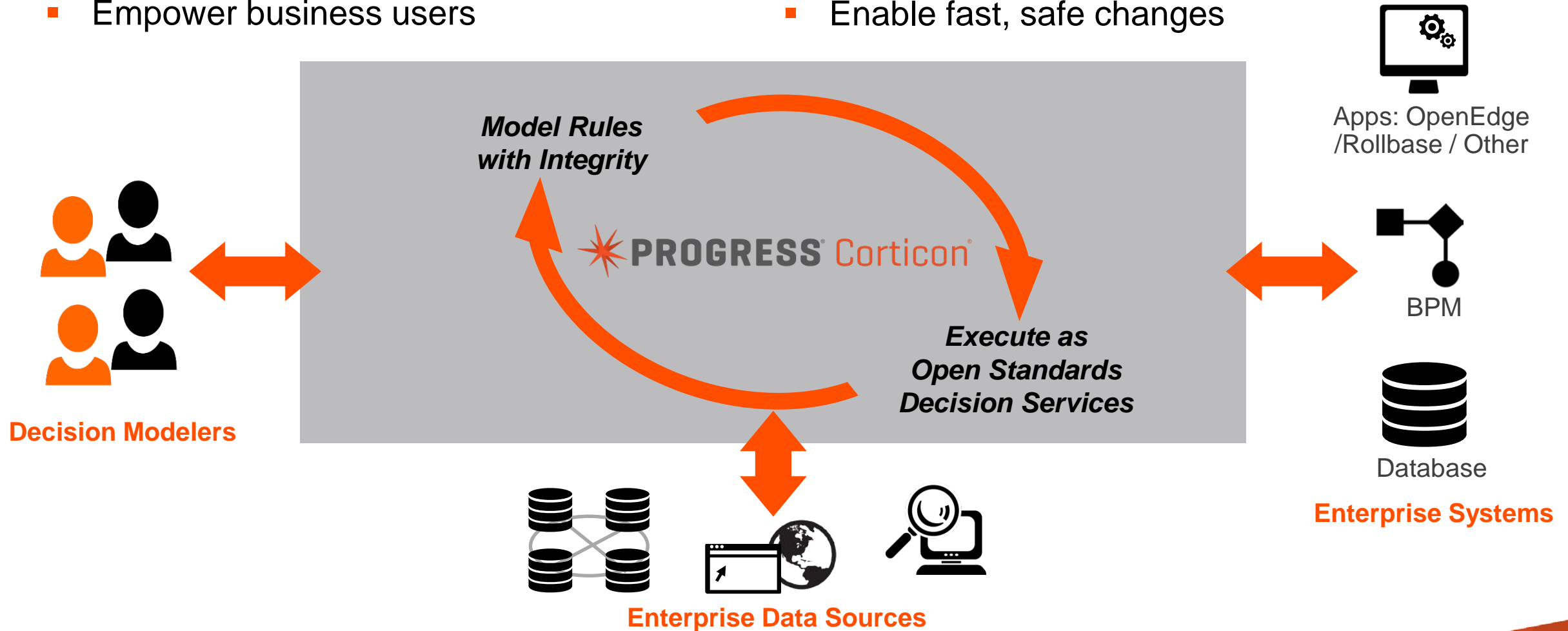


A person in a dark suit and tie is holding a tablet. Overlaid on the image are several digital elements: a globe in the center, a network of circular icons with people silhouettes connected by lines, and a group of stylized human figures in the background. The text 'Integration With OpenEdge' is centered over an orange horizontal band.

Integration With OpenEdge

The Solution: Progress Corticon Business Rules Management System

- Separate decision logic from code
- Empower business users
- Ensure performance & scalability
- Enable fast, safe changes



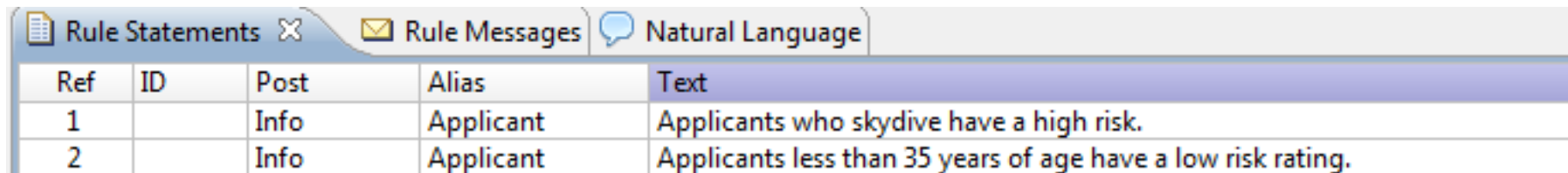
OpenEdge & Corticon Integration

1. Simple, fast ABL API

- Simple API that hides most if not all complexity
- Allows ABL application to reuse existing data structures as inputs/outputs (ProdataSets, Temp Tables)
- API hides transport (currently XML payload)

OpenEdge Contains following ABL macros:

- **BR-CONNECT:** Establish Decision Service Connection
- **BR-INVOKE:** Invoke Decision Service (Connection Params, Service Name, Version)
- **BR-GETMSG:** Call Get Rule Messages



Ref	ID	Post	Alias	Text
1		Info	Applicant	Applicants who skydive have a high risk.
2		Info	Applicant	Applicants less than 35 years of age have a low risk rating.

OpenEdge & Corticon Integration

```
METHOD PRIVATE VOID button1_Click( INPUT sender AS System.Object, INPUT e AS System.EventArgs ):
```

```
oOptions = NEW JsonObject().
oOptions.Add ('URL', 'http://localhost:8980').
oParams = NEW RulesServerConnectionParameters(oOptions).
oConnection = NEW RulesServerConnection(oParams).
```

```
cServiceName = 'RiskRatingOE'.
decisionService = NEW DecisionService(oConnection, cServiceName).
```

Establish connection
with decision service

```
EMPTY TEMP-TABLE Applicant.
CREATE Applicant.
Applicant.age = INTEGER(THIS-OBJECT:txtAge:Text).
Applicant.isSkydiver = LOGICAL(THIS-OBJECT:chkSkydiver:Checked).
```

```
decisionService:InvokeService(INPUT-OUTPUT TABLE Applicant BY-REFERENCE).
```

Call decision service

```
FIND LAST Applicant.
THIS-OBJECT:txtRiskRating:Text = Applicant.riskRating.
/* get the messages */
```

```
decisionService:GetMessages(OUTPUT table RulesMessage).
listBox1:Items:Clear().
```

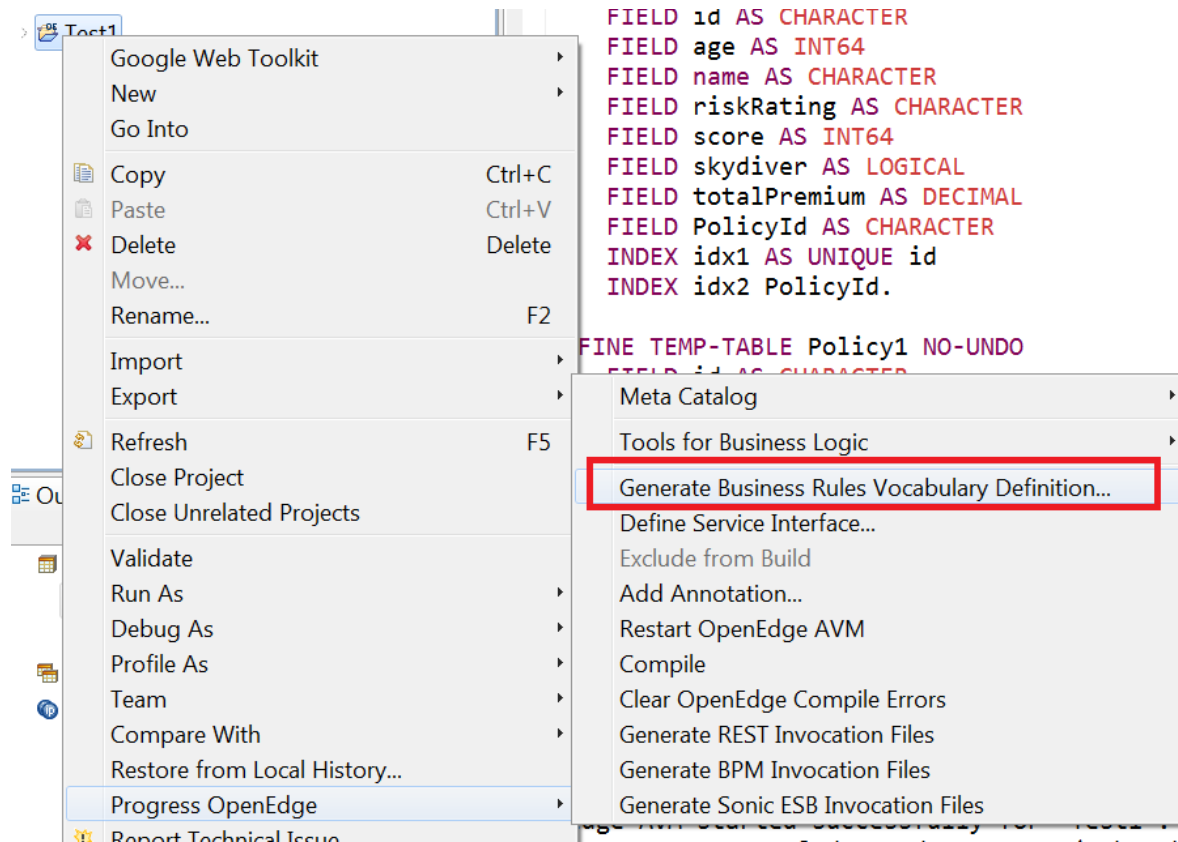
Work with the rule
execution messages

```
FOR EACH RulesMessage:
listBox1:Items:Add(RulesMessage.MessageText).
END.
```

OpenEdge & Corticon Integration

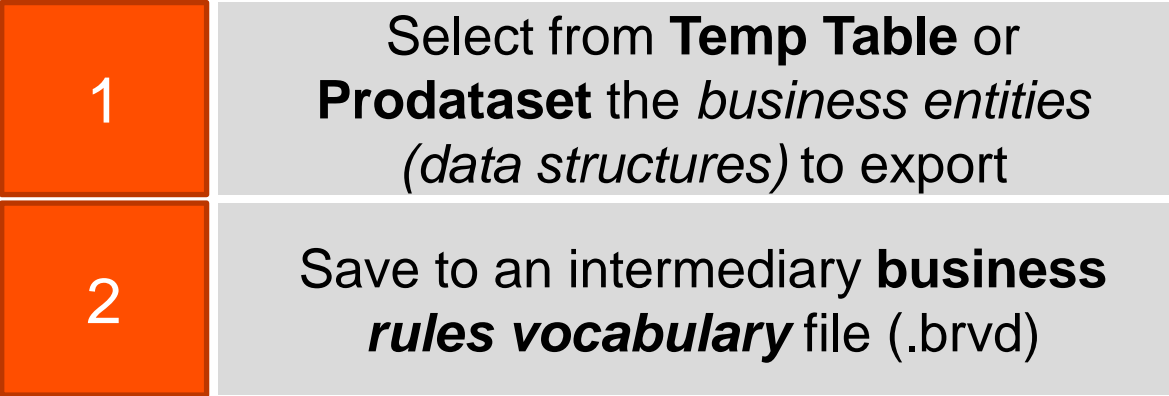
2. Integrated development experience

- Shared Definition of Vocabulary that rules operate on:
import Schema definitions, ProDataSets & Temp tables as Corticon vocabulary Entities



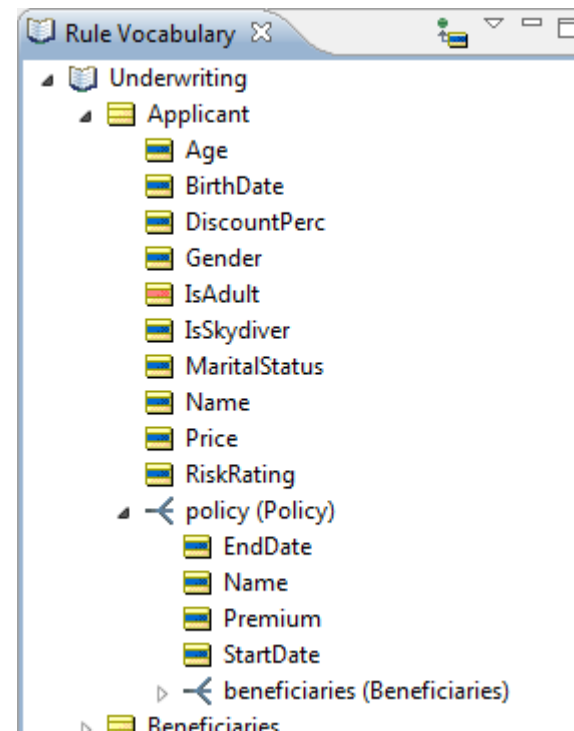
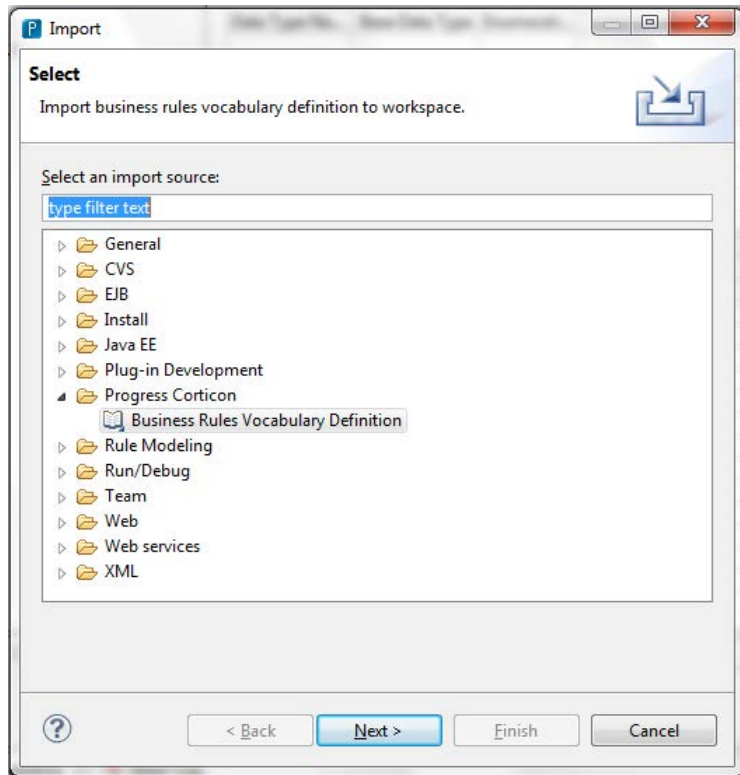
Export **Temp Table**
or **Prodataset**
to create a
Corticon vocabulary
From Progress
Developer
Studio

2. Integrated development experience (continued)



OpenEdge & Corticon Integration

2. Integrated development experience (continued)



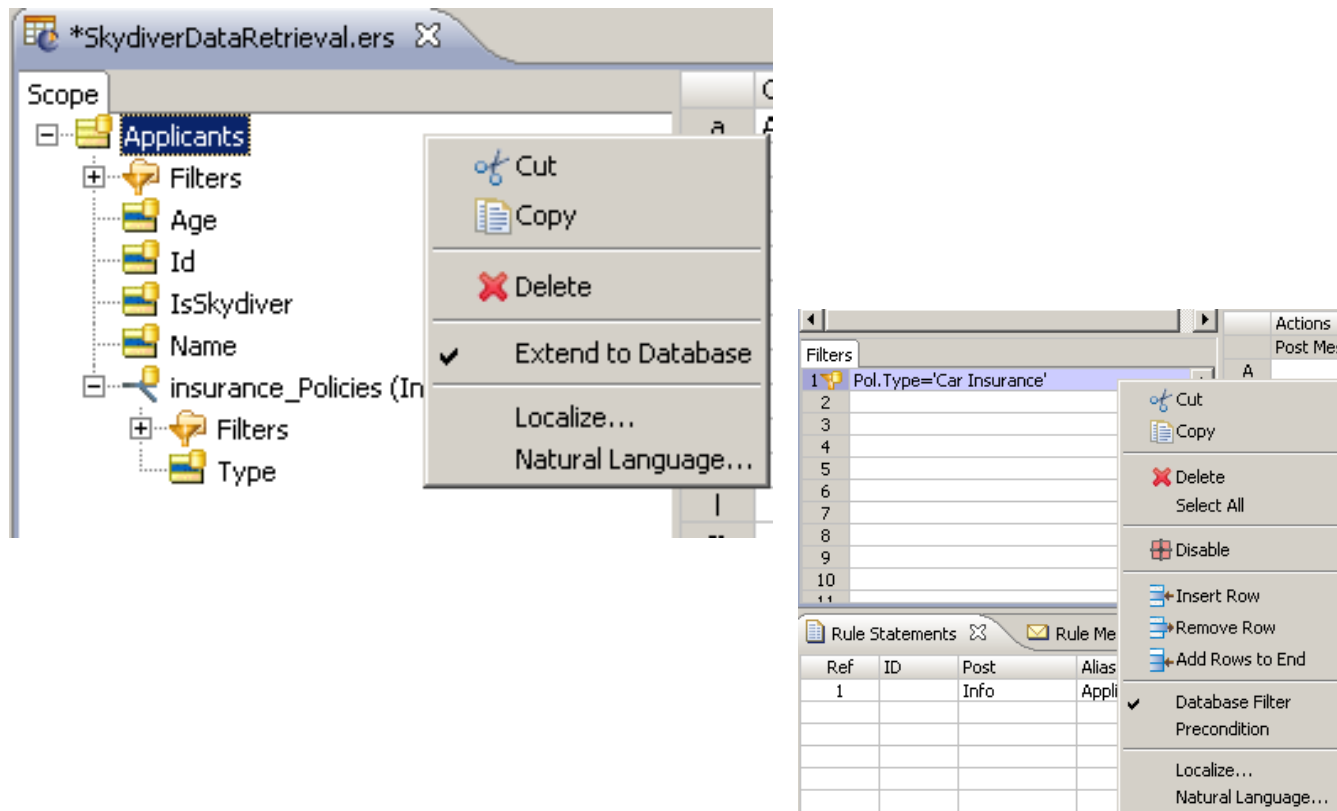
In Corticon Studio
import the .brvd file

This will create your
Corticon vocabulary

OpenEdge & Corticon Integration

3. Corticon access to OpenEdge data and services

- Corticon EDC (Enterprise Data Connectivity) for OE DB (via DataDirect JDBC drivers).
Support for OE 11.x and 10.2B



Bind your Corticon
vocabulary to your
OE database tables

Conditionally retrieve
data and optionally
persist results whilst
processing rules
without SQL coding!

A man with glasses and a beard is shown from the chest up, looking directly at the camera while typing on a keyboard. He is wearing a grey hoodie. The background is a dark blue gradient with vertical streams of glowing blue binary code (0s and 1s) falling, reminiscent of the 'Matrix' effect. An orange horizontal band across the middle of the image contains the text 'Hands on Workshop' in white. The keyboard is a standard beige computer keyboard, and a white mouse is visible on the left side of the desk.

Hands on Workshop

Exercise 2: Integrate Decision With OpenEdge (40 Minutes)

Reference procedure library

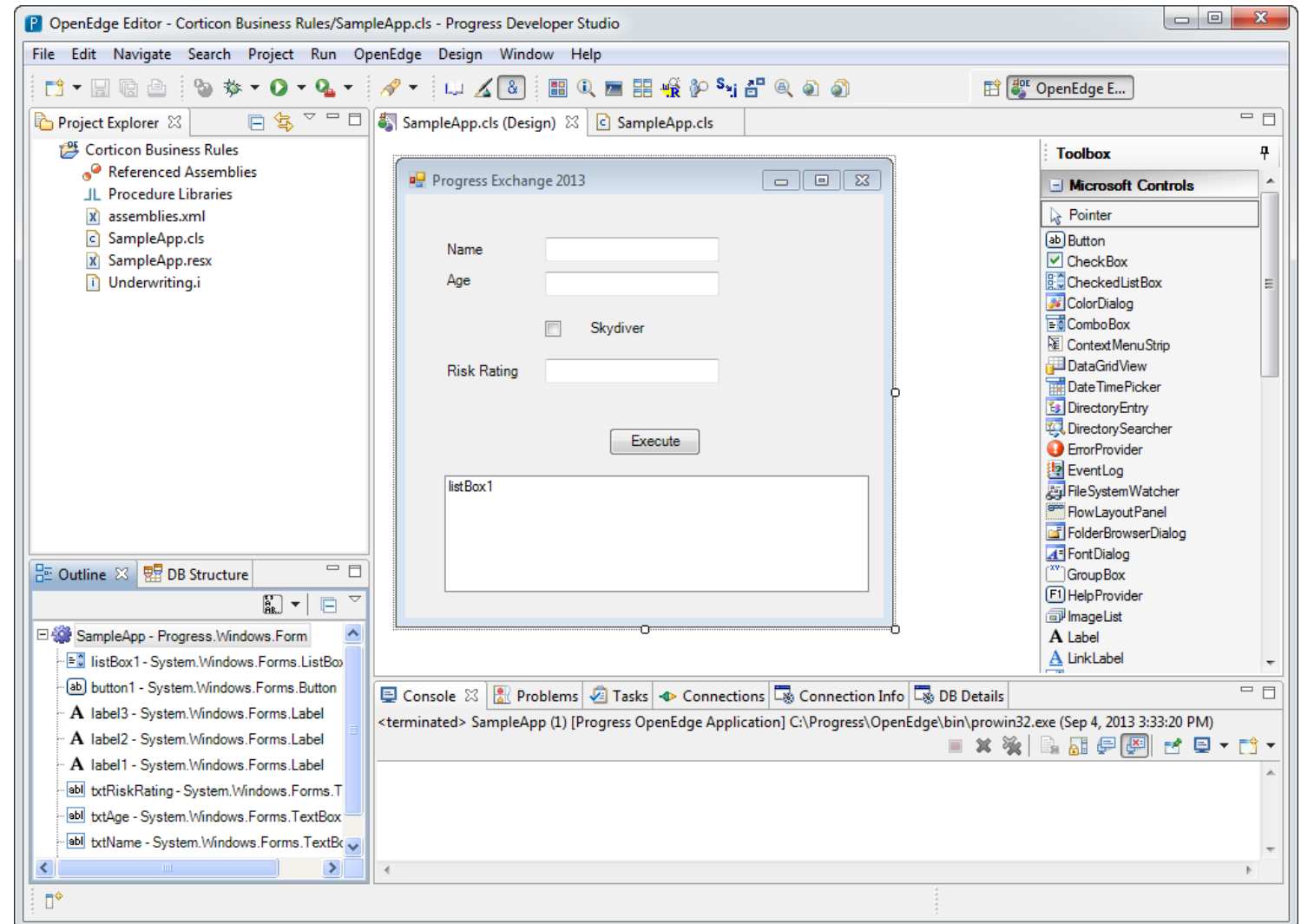
Define the connection variables

Establish the connection

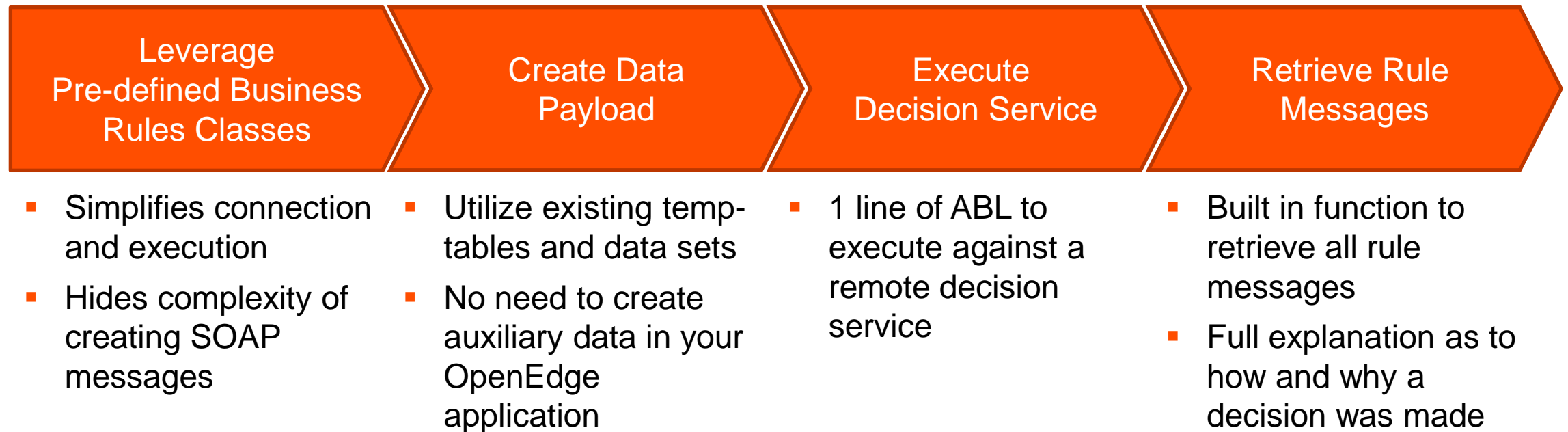
Create the data payload

Execute the decision service

Update UI with results



Review Exercise 2: Integrate Decision with OpenEdge

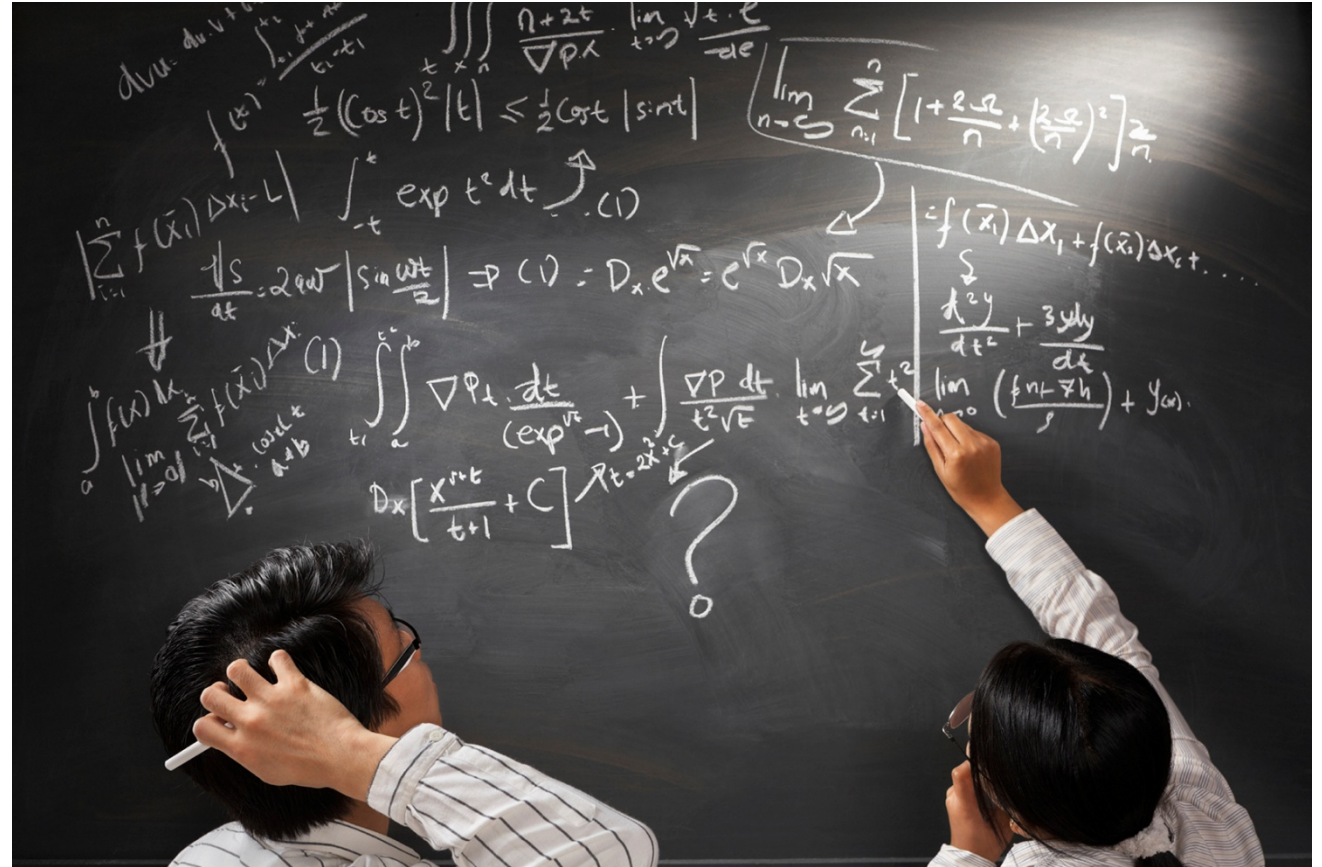


A hand is shown pointing at a glowing blue square button on a futuristic interface. The background is dark blue with glowing blue squares and white circuit lines. An orange banner is overlaid across the middle of the image.

Benefits of Using Corticon for OpenEdge

Why Use Corticon?

- Is the business logic the result of relatively **complex** decisions?
- Is the business logic **customized** by the client?
- Are **changes** frequently required to the application's business logic?
- Is **quality** / integrity of logic critical?



The more “yes” answers, the better the fit for Corticon!

A man with glasses and a beard is shown from the chest up, looking directly at the camera. He is wearing a grey hoodie and has his hands on a keyboard. The background is a dark blue gradient with vertical streaks of light blue and white, resembling a digital rain or data stream. A semi-transparent orange horizontal band is overlaid across the middle of the image, containing the text "Hands on Workshop" in white.

Hands on Workshop

Exercise 3: Update Decision Service (20 Minutes)

Make change to existing Rulesheet

Re-deploy the Decision Service

Re-execute from OpenEdge app

Review Results

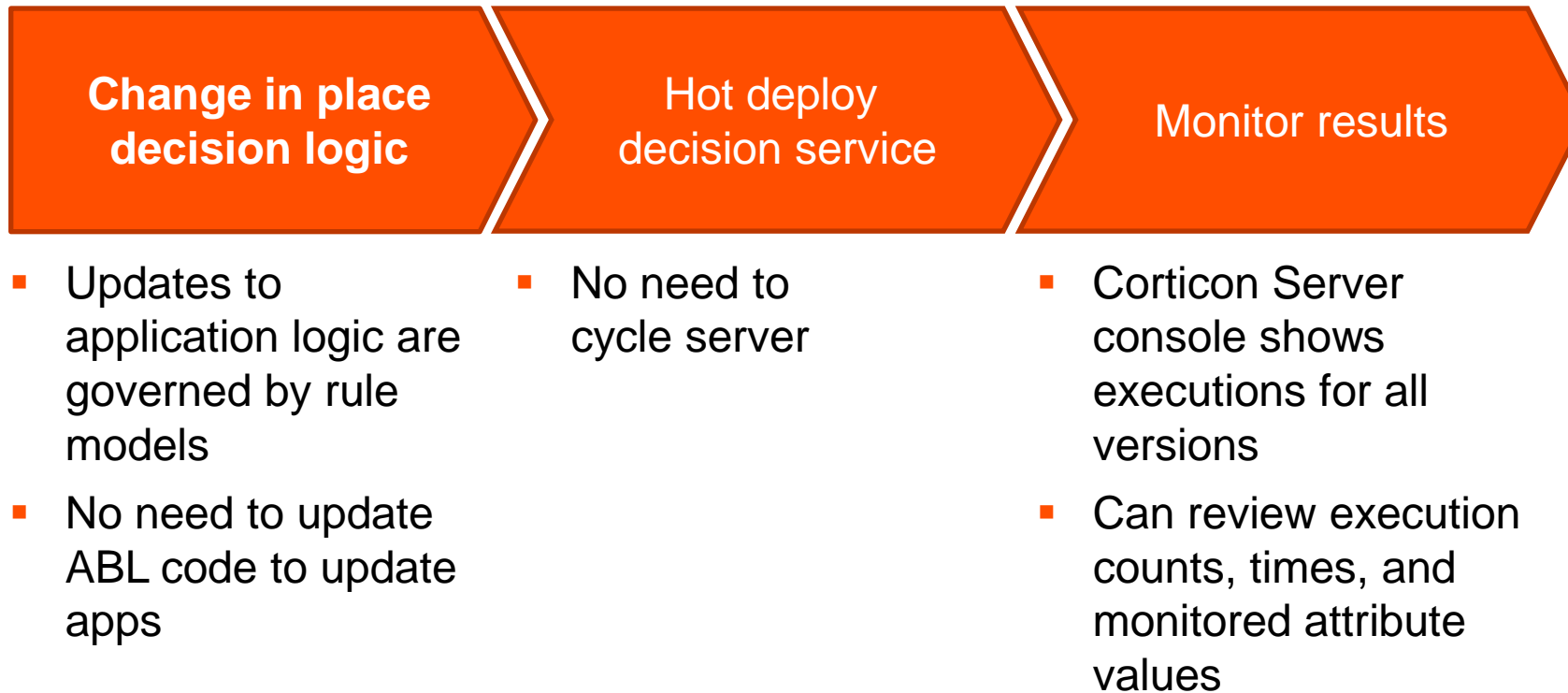
The screenshot displays the Progress Corticon Business Rules Server Console in a Firefox browser window. The console shows a table of deployed decision services. Below the table, the Progress Exchange 2013 application window is visible, featuring input fields for Name, Age, and Risk Rating, a checkbox for Skydiver, and an Execute button.

Service Name	Version	Live	Effective	Expires	Deployed from CDD	Dynamic Reload	Executions	Avg Time (ms)	Clear Stats
AllocateTrade	1.14	<input checked="" type="checkbox"/>			Yes	Yes	0	0	Clear
Candidates	1.14	<input checked="" type="checkbox"/>			Yes	Yes	0	0	Clear
ProcessOrder	1.10	<input checked="" type="checkbox"/>			Yes	No	0	0	Clear

Progress Exchange 2013

Name:
Age:
☐ Skydiver
Risk Rating:
Execute

Review Exercise 3: Update Decision Service

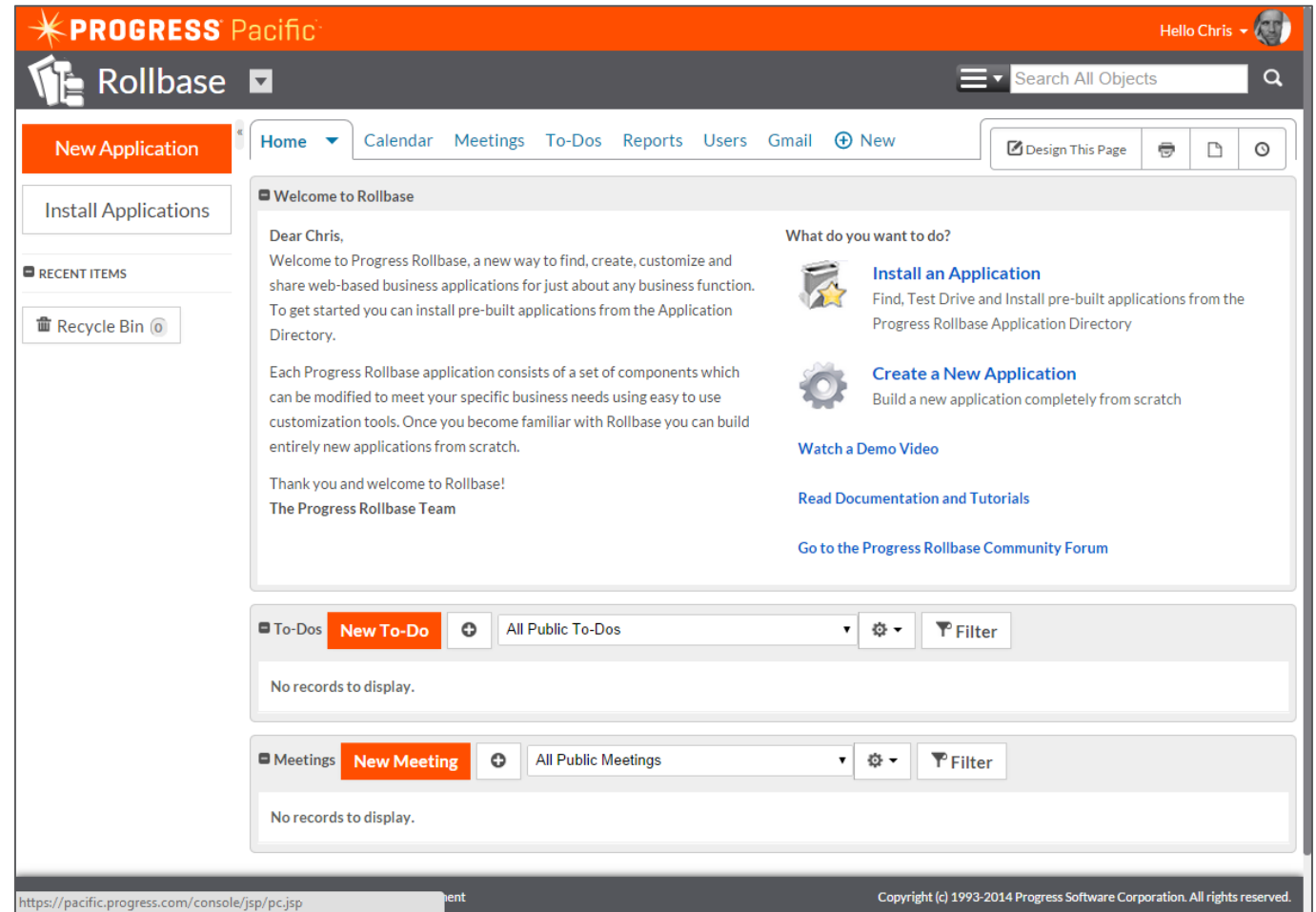


A person in a dark suit and tie is holding a tablet computer. Overlaid on the image is a digital graphic featuring a globe with a network of white lines and circular icons containing silhouettes of people. The text 'Social network' is visible within some of these icons. Two smartphones are also depicted: one on the left showing a blue screen with white silhouettes, and one on the right showing a grid of colorful app icons. A solid orange horizontal band spans the middle of the image, containing the title text in white.

Additional Corticon Applications

Progress Rollbase

- Application Platform as a Service
- Model Driven development
- Data Model
- Workflow Model
- User Interface Model
- 80% clicks / 20% code
- JavaScript language



Progress Rollbase

PROGRESS Pacific Hello Chris

Setup

New Application

Install Applications

Personal Setup Applications Setup Administration Setup

Application Setup > Objects > Vocabulary > Trigger

<< return to Repository

Vocabulary: New Trigger

Next > Cancel

Trigger Type

Select the type of action that should be performed when this trigger runs.

Type	Group	Description
<input type="radio"/> Send Email	Notification	You must create at least one Email Template before you can use this trigger.
<input type="radio"/> Create Audit Trail Record	Notification	Create a new Audit Trail Record based on a text template and attach it to current or related record.
<input type="radio"/> Validate Record Data	Data Validation	Validate record's data using expression. If expression results in error, data operation will be terminated and error message displayed.
<input type="radio"/> Unique Fields Combination	Data Validation	Validate that certain combination of fields is unique across all records.
<input type="radio"/> Update Field Value	Data Manipulation	Update the value of a Field in this Record or a Related Record using formula.
<input type="radio"/> Change Workflow Status	Data Manipulation	Change this Record's Workflow Status.
<input type="radio"/> Create New Record	Data Manipulation	You must create at least one Conversion Map before you can use this trigger.
<input type="radio"/> Attach Related Record	Data Manipulation	You must create at least one Relationship before you can use this trigger.
<input type="radio"/> Create Template Document	Data Manipulation	You must create at least one Document Template before you can use this trigger.
<input type="radio"/> Run Triggers on Related Records	Data Manipulation	You must create at least one Relationship before you can use this trigger.
<input type="radio"/> Object Script	Data Manipulation	Run a script allowing manipulating multiple fields and objects in one trigger through API calls.
<input type="radio"/> Send HTTP GET Request	Integration	You must create at least one Integration Link field before you can use this trigger.
<input type="radio"/> Send HTTP POST Request	Integration	You must create at least one Document Template with text document before you can use this trigger.
<input type="radio"/> Send SMS Message	Integration	Send SMS text message to recipient through external SMS Gateway.

Next > Cancel

https://pacific.progress.com/console/jsp/pc.jsp

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- Trigger Driven Event Model
- HTTP GET/POST
- Template driven SOAP/REST

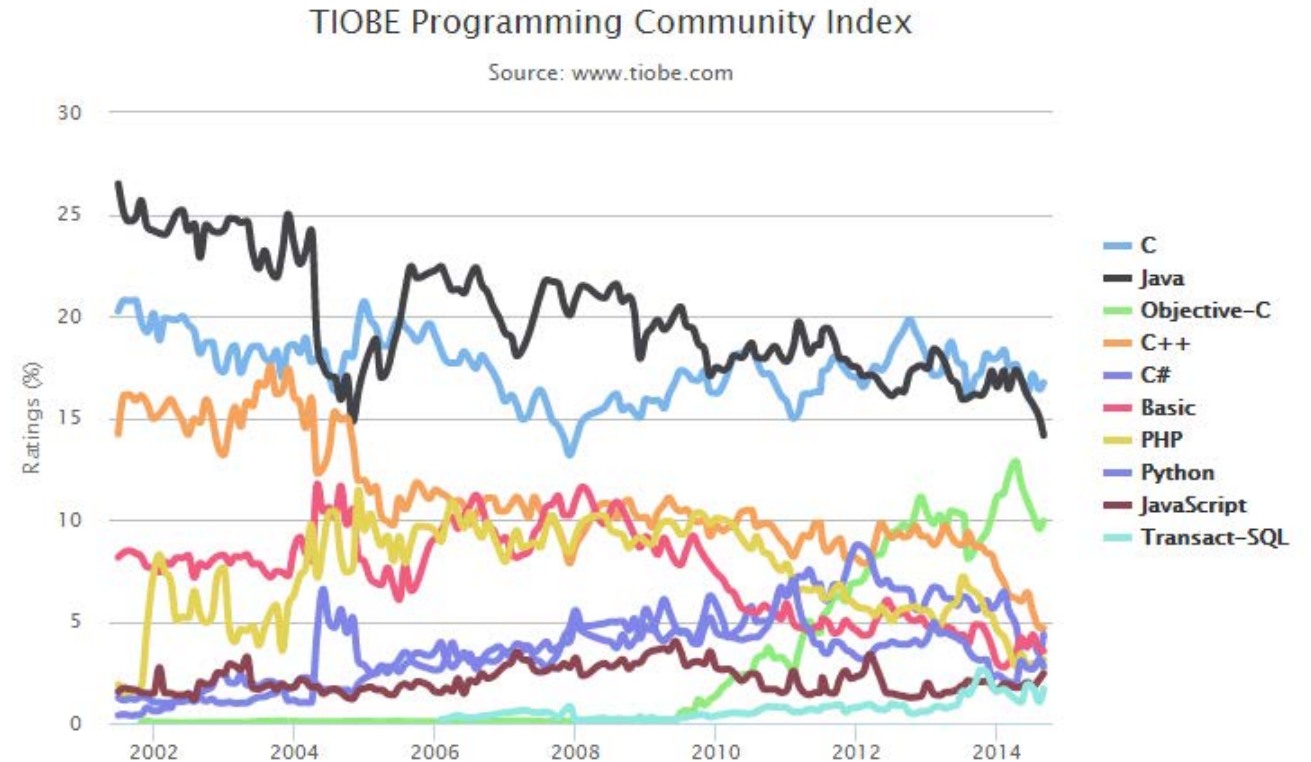
Java & .NET Applications

- Deployment to commercial app servers
 - WebSphere
 - WebLogic
 - JBoss
 - Tomcat
 - .NET Server
- Embedded in-process
 - XML
 - Native objects



Other Applications

- SOAP Web Services consumed universally (C++, PHP, COBOL, Python, Perl)
- Business Process Management (BPM)
 - Routing determination
 - Escalations
 - Dynamic task assignment
- Bulk Data Transformation
 - Model Driven Data Connectivity

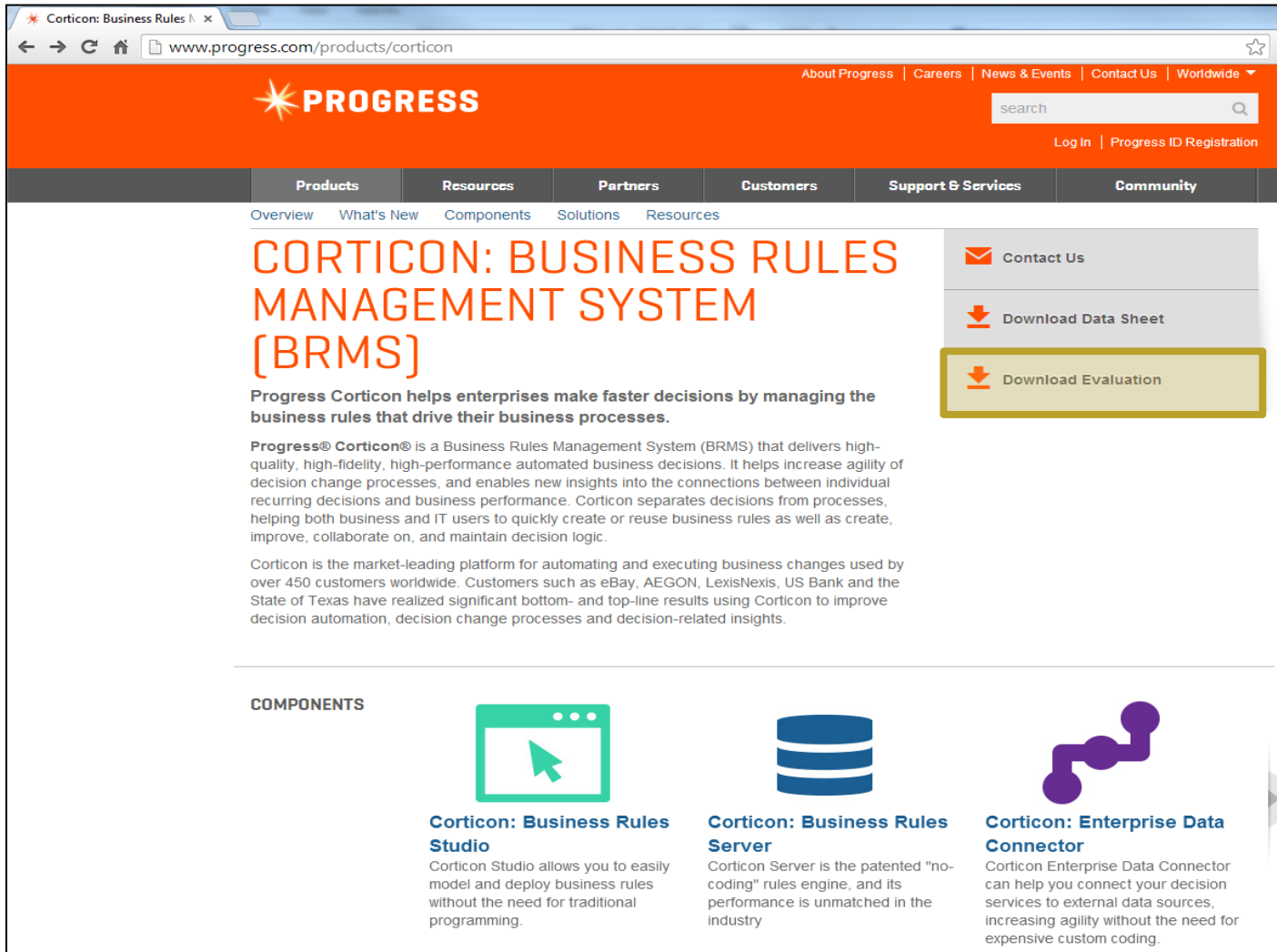




DISCOVER

Additional Resources

Evaluate Progress Corticon



The screenshot shows the Progress Corticon website. The header features the Progress logo, a search bar, and navigation links for About Progress, Careers, News & Events, Contact Us, and Worldwide. Below the header is a navigation bar with links for Products, Resources, Partners, Customers, Support & Services, and Community. The main content area is titled "CORTICON: BUSINESS RULES MANAGEMENT SYSTEM [BRMS]" and includes a brief description of the system's capabilities. To the right of the main text are three buttons: "Contact Us", "Download Data Sheet", and "Download Evaluation". Below the main text is a section titled "COMPONENTS" which lists three components: Corticon: Business Rules Studio, Corticon: Business Rules Server, and Corticon: Enterprise Data Connector, each with a brief description and an icon.

CORTICON: BUSINESS RULES MANAGEMENT SYSTEM [BRMS]

Progress Corticon helps enterprises make faster decisions by managing the business rules that drive their business processes.

Progress® Corticon® is a Business Rules Management System (BRMS) that delivers high-quality, high-fidelity, high-performance automated business decisions. It helps increase agility of decision change processes, and enables new insights into the connections between individual recurring decisions and business performance. Corticon separates decisions from processes, helping both business and IT users to quickly create or reuse business rules as well as create, improve, collaborate on, and maintain decision logic.

Corticon is the market-leading platform for automating and executing business changes used by over 450 customers worldwide. Customers such as eBay, AEGON, LexisNexis, US Bank and the State of Texas have realized significant bottom- and top-line results using Corticon to improve decision automation, decision change processes and decision-related insights.

COMPONENTS

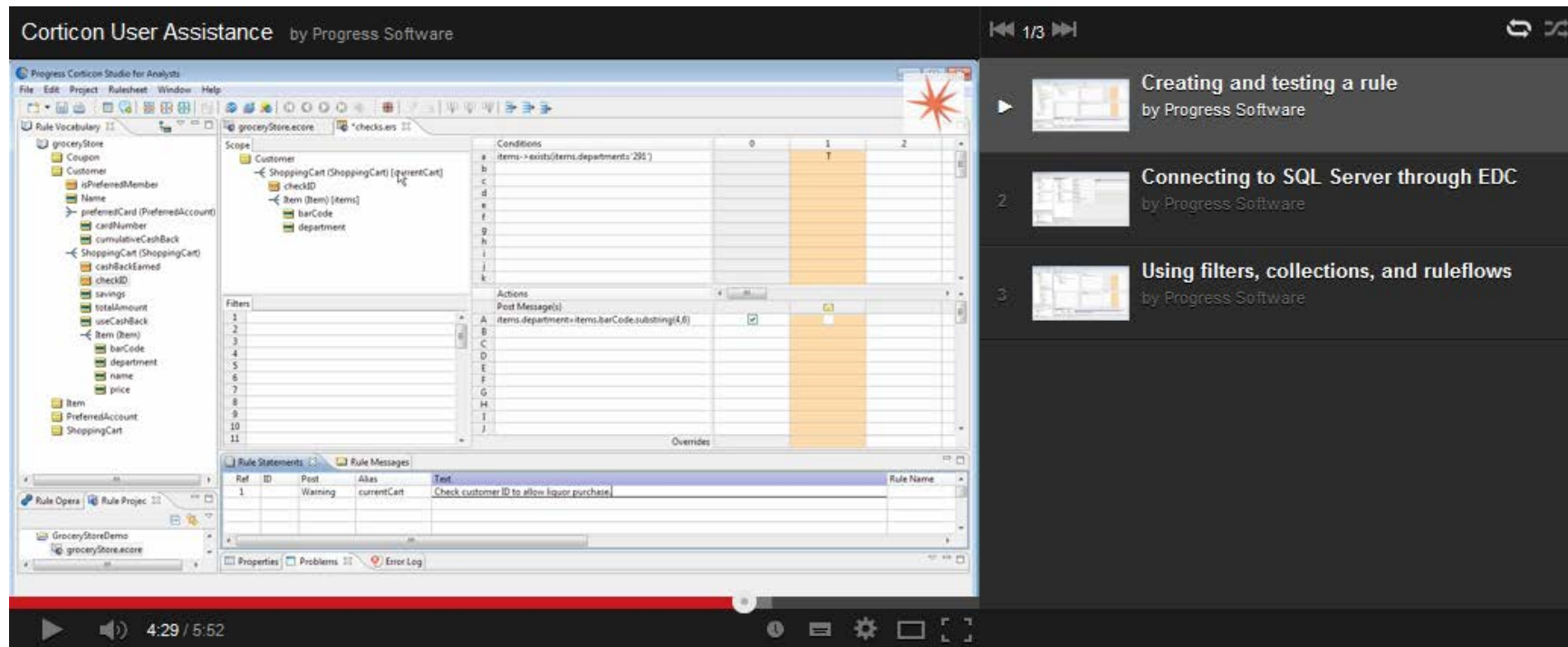
- Corticon: Business Rules Studio**
Corticon Studio allows you to easily model and deploy business rules without the need for traditional programming.
- Corticon: Business Rules Server**
Corticon Server is the patented "no-coding" rules engine, and its performance is unmatched in the industry.
- Corticon: Enterprise Data Connector**
Corticon Enterprise Data Connector can help you connect your decision services to external data sources, increasing agility without the need for expensive custom coding.

Download Corticon Studio

www.progress.com/products/corticon

Watch & Learn

Watch Corticon in Action on YouTube: <http://www.youtube.com/user/ProgressSW>



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EDUCATION COMMUNITY



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The screenshot displays the Progress Community website interface. At the top, there's a navigation bar with the Progress logo and links for Company Info, Contact Us, Worldwide, and a Try Now button. Below this is a secondary navigation bar with links for Products, Solutions, Resources, Partners, Support & Services, and Community. The main content area is titled 'Technical Users' and includes a description: 'Members of this group typically have in-depth knowledge of programming language(s) and IT responsibilities and expertise for application development and maintenance.' There are buttons for 'LEAVE GROUP' and 'CREATE NEW POST'. A sidebar on the right shows a user profile for Chris S. Hogan, member since 09/23/2013, with options to Log out, settings, and a search bar. Below the profile, there's a 'MEMBER OPTIONS' section with links for Unbookmark forum, Forum notifications are on, Start a new thread, Mark all read, RSS, and Manage subscriptions. An 'EMAIL INFORMATION' section shows 'Email this forum' and 'Subscribed: Yes'. At the bottom, there's a 'MOST VIEWED THREADS' section. The main thread list shows two threads: 'Corticon WSDL Generation in Server Console' by Chris S. Hogan (9-9-2014 11:17 AM, 3 replies) and 'Enquiry of DB2 for z/OS supported by Corticon EDC' by cammyc (8-29-2014 9:07 AM, 2 replies). A chat status bar at the bottom indicates 'Chat: 0 Online'.

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<http://community.progress.com>

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