



# Modernization of Mainframe Applications with Business Rules and Events

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### SHARE Tethnology - Centrellins - Results

# Agenda

- Concepts of Operational Decision Management (ODM)
- ODM Capabilities on z/OS
  - Decision authoring and Decision execution options
  - Decision management and lifecycle
- Rule discovery in existing applications



## **Operational Decisions in Organizations**





#### **Challenges for a Change Request**

- Changes are costly, resource & timeintensive
  - Hidden in code
  - Most changes have to be programmed – costly
- Lack of consistency
  - No central management
  - No reuse of decision logic
- Gap between business analysts & IT administrators
  - Knowledge fades over time
- Lack of audit ability
- No easy way to test/simulate changes



### Operational Decision Management Approach





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# **IBM's Path to Operational Decision Management**



Decision Management is an approach, combining software and expertise, to automate, improve and govern operational decisions across the enterprise

### 2009

#### **ILOG BRMS**

- Full featured rule management capabilities from IT to business teams
- Recognized performance and scalability

#### WebSphere Business Events

- Events accessible to business teams
- From event definition to correlation

### 2010

#### WebSphere ILOG BRMS 7.1

• What-if-analysis

#### WebSphere Decision Server 7.1

- First step to have rules and events working together
- 2 separate mgmt environments

#### **Support Packs**

- Import PMML as Decision tree and Runtime integration with SPSS C&DS
- WebSphere Business Monitor integration

### 2011

# IBM Operational Decision Management

- Combined business rules and events management
- Consistent design tooling
- Centralized decision repository with single mgmt environment
- Extended governance capabilities
- Additional deployment options for z/OS



## **Operational Decision Management = ILOG + WBE**



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### **Business Rules**

Primarily implements a decision model – given a snapshot view of data, determines best course of action at a specific point in a process or application

Main purpose is to automate a decision based on a combination of factors (business policies, regs, best practices)

If the Passenger is a gold frequent traveler and flight distance is more than 4000 miles and the flight destination is in Europe or Asia Then Add 10,000 points to the fidelity card of the Passenger

### **Business Events**

Primarily implements a time-based pattern detection model – correlating events as data is in motion

Main purpose is to determine what of interest is transpiring and coordinate one or more responses by other systems or generate alerts to people

If more than 2 customer withdrawals in an ATM are done in the same day and the 2 ATMs are from 2 foreign countries Then Investigate possible fraud Reduce cash redraw max amount to 100\$

*Gartner* characterizes Rules and Complex Event systems as complementary notions. The combination being required to implement intelligent decision management programs.



## **ODM – Precise, Automated Decisions**



Horizontal: best/appropriate price, cross-sell/ up-sell recommendations, loyalty promotions, exception identification, risk/fraud assessment, straight-through processing approvals











| Insurance  | Banking  | Healthcare  | Government   | Energy/Utility  |
|--|--|---|--|---|
| <ul> <li>Claim         <ul> <li>Validation</li> <li>STP approval</li> <li>Exception routing</li> </ul> </li> </ul>   | <ul> <li>Loan         <ul> <li>Eligibility</li> <li>Risk</li> <li>Pricing</li> </ul> </li> </ul>   | <ul> <li>Patient Care</li> <li>Drug interaction<br/>risk warnings</li> <li>Follow-up alerts</li> </ul>  | <ul> <li>Benefits         <ul> <li>Eligibility</li> <li>Calculations</li> </ul> </li> </ul>  | <ul> <li>Land/Permits</li> <li>Conveyance<br/>processing</li> <li>Contract<br/>compliance</li> </ul>  |
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# **Modernising your Applications**



- Operational Decision Management enables organizations in every industry to make their business rules and business decisions clear, consistent and expressed in business language to be able to change when the business needs.
- Transformation or modernization of z/OS applications
- Ability to react to change (timely reaction to market and competitive changes)
- Overcome IT and Business mis-alignment keep up and service business requests
- Eliminate resource drain on application maintenance – reuse of business decisions across applications and platforms





# **Operational Decision Management Capabilities – Rules**



# **IBM ODM: Components**





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# **Data Model - Verbalization**





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### **Rule and Event Designer**



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- Eclipse-based Development Environment
  - Rule Designer Perspective
  - Event Designer Perspective

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# Starting from a COBOL Copybook





#### Scenario

- Existing COBOL containing business rules
- Data model defined in COBOL copybook
- Use ODM to modernize the business policy

#### Benefits

- Modernize business policies in ODM
- Rules can be invoked 'naturally' from existing COBOL application
- Business policy/rule lifecycle detached from application lifecycle



# Rule Authoring – COBOL Copybook XOM

- Support Enterprise COBOL 3.4, 4.1 & 4.2
- Java is created from the copybook structure
  - Java XOM & Java code to marshal between COBOL <-> Java
  - 01 level structures mapped to class in BOM
- Redefines statements supported
  - Select which redefines structure to import
- COBOL Table support
  - Mapped to Java List<type> structures
- COPY statements supported
- Level 88 supported
  - Mapped to methods in BOM









# Starting from an existing Rule Project





#### Scenario

- Existing rule projects exist that are currently in use on distributed platforms
- Concurrent execution of rules is required on System Z

#### Benefits

- Consistent decision rules wherever they are executed
- Rules can be invoked 'naturally' from existing COBOL application
- Enables central rule management across
   System Z and Distributed platforms



## **Operational Decision Management on System z**

- Decisions can be invoked from existing CICS, IMS and batch applications
- Runtime support for COBOL data types
- Flexible runtime deployment to fit any System z environment:
  - Deployed on WebSphere Application Server for z/OS
  - Deployed standalone to z/OS
  - Deployed in CICS TS 4.x JVM Server environment





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## **New COBOL Programming API**



### HBRCONN

 Connect to the rule engine using conn area

### HBRRULE

 Run the rules copying in the rule name and data

### HBRDSC

Disconnect from the rule engine

01 HBRA-CONN-AREA. PIC X(4) VALUE 'HBRC'. 10 HBRA-CONN-EYE 10 HBRA-CONN-LENTH PIC S9(8) COMP. 10 HBRA-CONN-VERSION PIC S9(8) COMP VALUE +2. 10 HBRA-CONN-RETURN-CODES. 15 HBRA-CONN-COMPLETION-CODE PIC S9(8) COMP. 15 HBRA-CONN-REASON-CODE PIC S9(8) COMP. 10 HBRA-CONN-FLAGS PIC S9(8) COMP VALUE +1. **10 HBRA-CONN-INSTANCE** PIC X(24). 10 HBRA-CONN-RULE-COUNT PIC S9(8) COMP. 10 HBRA-CONN-RULE-MAJOR-VERSION PIC S9(8) COMP. 10 HBRA-CONN-RULE-MINOR-VERSION PIC S9(8) COMP. 10 HBRA-CONN-RULEAPP-NAME PIC X(256). 10 HBRA-RESPONSE-AREA. PIC X(512). 15 HBRA-RESPONSE-MESSAGE 10 HBRA-RA-PARMETERS. 15 HBRA-RA-PARMS OCCURS 32. 20 HBRA-RA-PARAMETER-NAME PIC X(48). USAGE POINTER. 20 HBRA-RA-DATA-ADDRESS 20 HBRA-RA-DATA-LENGTH PIC 9(8) BINARY. 10 HBRA-RESERVED. 15 HBRA-RESERVED02 PIC X(12). PIC X(64). 15 HBRA-RESERVED03 PIC X(64). 15 HBRA-RESERVED04 PIC X(128). 15 HBRA-RESERVED05

15 HBRA-RESERVED06

PIC X(128).



### New programming API within a COBOL program



|   | JAAN  |
|---|---|
| ne 33 _ Column 12 Insert 139 changes                      | Line 81 Column 12 Insert 144 changes                        |
| -+-*A-1- <mark>B</mark> +2+3+4+5+6+7                      | +-*A-1- <mark>B</mark> +2+3+4+5+6+7                         |
| IDENTIFICATION DIVISION.                                  | * Read scenario data  |
| PROGRAM-ID. HBRMINC.                                      | MOVE ALL LOW-VALUES TO WS-IN                                |
| •••   | UNSTRING SCENARIO-DATA DELIMITED BY ','                     |
|   | INTO  |
| WORKING-STORAGE SECTION.                                  | WS-IN-data(1) WS-IN-data(2) WS-IN-data(3)                   |
|   | WS-IN-data(4) WS-IN-data(5) WS-IN-data(6)                   |
| * Parameter Data  | * Populate the borrower from scenario data                  |
| COPY MINILOAN.  | move WS-IN-data(1) to name                                  |
| * Return Code definitions                                 | Compute creditscore = Function numval(WS-IN-data(2))        |
| COPY HBRC.  | Compute yearlyIncome = Function numval(WS-IN-data(3))       |
| HBR Header structure                                      | * Populate the loan from scenario data                      |
| COPY HBRWS.   | Compute amount = Function numval(WS-IN-data(4))             |
| •••   | Compute yearlyRepayment = Function numval(WS-IN-data(5))    |
|   | Compute yearlyInterestRate = Function numval(WS-IN-data(6)) |
| PROCEDURE DIVISION.                                       |   |
|   | * Invoke the rule   |
| Connect to ZKES   | Call HBRRULE Using HBRA-COWN-AREA                           |
| Call HBRCONN USING HBRA-CONN-AREA                         |   |
|   | EXEC CICS SUSPEND END-EXEC                                  |
| IF HDKA-COMM-COMPLETION-CODE NOT EQUAL HDK-CC-OK THEN     | * Display nula responses, en ennen sada, es ennenniste      |
|   | if HRRA CONN COMPLETION CODE - HRR CC OK then               |
| END-1F  | display 'HBR CALL Successful'                               |
| Initializa call nonometans                                | display TBR CALL Sucessful                                  |
| MOVE ALL SPACES TO Reproven Loop                          | * Disconnect  |
| MOVE ALL SPACES TO BOPTOWER LOAN                          | call 'HBRDISC' using HBRA-CONN-AREA                         |
| MOVE #LE LOW-VALUES TO HDRA-RA-FARMETERS                  |   |
|   | TE HBRA_CONN_COMPLETION_CODE NOT FOUND HBR_CC_OK THEN       |
|   | nerform onFailedCall  |
| move LENGTH OF Reprover to $HBRA_RA_DATA_LENGTH(1)$       | END_TE  |
| move "borrower" to HBRA_RA_PARAMETER_NAME(1)              |   |
| set HBRA_RA_DATA_ADDRESS(1) to address of Borrower        | nerform prtDemoText   |
|   |   |
| move LENGTH OF Loan to HBRA-RA-DATA-LENGTH(2)             | EXEC CTCS RETURN END-EXEC                                   |
| multiply length of messages by 10 giving WS-mayMessagelen | GOBACK.   |
| add WS-maxMessagelen to HBRA-RA-DATA-LENGTH(2)            | obretti   |
| move "loan" to HBRA-RA-PARAMETER-NAME(2)                  |   |
| set HBRA-RA-DATA-ADDRESS(2) to address of Loan            |   |
|   |   |
| move 'E' to approved                                      |   |
|   |   |

# **Rule Invocation Options in 8.0**



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### zRule Execution Server for z/OS





# Decision Server Options Summary

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**OTTB integration with COBOL applications** 

Full support for all rule authoring constructs

**Business Event Execution Support** 

Hot deployment support for new decision versions

Integration with Decision Center business tooling

**Testing and simulation support** 

**Decision Warehousing rule auditing support** 

Easy sharing of rules with distributed deployments

Local execution support for CICS TS v4.x

**Full HA & transactional support** 

# **Deployment Options for ODM on System z**



Decisions can be invoked from existing CICS, Batch, IMS batch applications Runtime support for COBOL data types Flexible runtime deployment to fit any System z environment: Deployed on WebSphere Application Server for z/OS Deployed on CICS TS 4.x (JVM server environment) Deployed standalone to z/OS





# Decision Center: Web-based Console

- Access rule artifacts concurrently without conflict or delay
- Take control of very large rulebases with Smart Views, easy search and reporting
- Get automatic notification of rule conflicts, redundancies
- See where rules are used across projects using queries
- Hot-deploy rule changes in minutes
- Secure, integrated with enterprise security facility including single sign-on





### **Testing and Simulation**

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- Out-of-the-box ruleset testing
- Business impact simulation
- Scenario configuration and customization
- Auditing using Decision Warehouse

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### **Scenario Definition**



| 1 2 A B<br>1 Create your scenarios For more information see the <u>HELP</u>          | C D                                |                       |                   |                        |               |
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| 1 Create your scenarios For more information see the HELP                            | C D                                | E                     | F G               | Н                      | I             |
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| 2 bo   | borrower                           |                       | loan              | A second statement and | -             |
| + 5 Scenario name Description ye   | yearly income credit score         | name                  | amount approve    | d yearly interest rate | duration      |
| Scenario 2     Good credit, get rate with insurance     Cood credit; get higher rate | 110000 700                         | John Simons           | 200000 FALSE      | 0.062                  | 5 120         |
| Scenario 2     Good credit, get nigher rate     Good credit; get rate                | 125000 750                         | Jane Howe             | 500000 FALSE      | 0.057                  | 5 120         |
| 9 Scenario 4 Great credit: get lawer rate  | 100000 8001                        | Fernando Rodriguez    | 300000 FALSE      | 0.002                  | 5 120         |
| 10 Scenario 5 Good credit: Joan too high   | 90000 700                          | Jaclyn Perkins        | 500000 FALSE      | 0.077                  | 5 120         |
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| Input Data 7 Scopario 1  | TPLIE                              | 1505                  | 45                |                        |               |
|  | TRUE                               | 1000                  | 5.45<br>5.45      |                        |               |
| o Scenario Z   | TRUE                               | 1/55                  | 0.45              |                        |               |
| 9 Scenario 3   | IRUE                               | 319                   | 90.9              |                        |               |
| 10 Scenario 4  | TRUE                               | 1755                  | 5.45              |                        |               |
| 11 Scenario 5  | FALSE                              |                       | 0                 |                        |               |
| Expected 12  | F9 - (9                            | fx                    |                   |                        |               |
| Results 13   | Δ                                  | B                     |                   | C D                    | F             |
| 14 1 500   | Il in the cells for the processing | a expected results vo | ou want for mo    | re information see the | HELP          |
| 15 2   | Num                                | ber of ruleflow ta    | sks e Number o    | f rules fired          | 1. Cher her t |
| 16 3   | Scenario name                      |                       | is                |                        |               |
| A Sce  | cenario 1                          |                       | 4                 | 15                     |               |
| 5 Sce  | cenario 2                          |                       | 4                 | 16                     |               |
| 6 Sce  | cenario 3                          |                       | 4                 | 14                     |               |
| 7 Sce  | cenario 4                          |                       | 4                 | 15                     |               |
| Rulset 8 Sce   | cenario 5                          |                       | 3                 | 5                      |               |
| Tests  |                                    |                       |                   |                        |               |
| 10   |                                    |                       |                   |                        |               |
| 11   |                                    |                       |                   |                        |               |
| 12   |                                    |                       |                   |                        |               |
| 12   |                                    |                       |                   |                        |               |
| 14 4 5 3   | Scenarios / Expected               | Results Expecte       | ed Processing R   | esults / HELP / 🖣      |               |

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### **Simulation Capabilities**

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Compose Query Analyze Project

ILOG Rule Team Server - Microsoft Internet Explorer

Address Address

Rerun Simulation | Simulation | Compare with...

Simulation as of this run
My Simulation - Version: 1.0

Explore

Explore > Run > Report

Min Income to .27

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••••• in Anaheim

| • | Test | suite | comparison |  |
|---|------|-------|------------|--|
|---|------|-------|------------|--|

- Simulation suite comparison
- Champion and challenger scenario
- Allows what if analysis

Scenarios used for this run loanvalidation-simulation.xls ILOG Rule Team Server - Microsoft Internet Explorer \_ 🗆 🗙 Run Date Jar Ele Edit View Favorites Tools Help Run By 🔇 Back 🝷 🕥 - 📓 🛃 🏠 🔎 Search 🤸 Favorites 🚱 🔗 - 🌺 🚍 📴 🏭 Rules tested Starting Ruleflow Task De Address 🕘 http://localhost:8080/teamserver/faces/explore/reportDetails.jsp WebSphere. ILOG Rule Team Server, Limited I rtsAdmin Sign Out WebSphere. ILOG Rule Team Server Server Analyze Project Evolore Compose Query Explore Compose Analyze Project bility - Last year history - all rules (Simula Summarv Explore > Run > Report > Compare with. loanvalidation-rules nex history with new candidate rule Last year history - all rules - Report Number of Scenarios 10 Simulation as of this run | 1 act year history - all rules - Version: 1.0 Simulation as of this run Last year history - all rules - Version: 1.0 Success Rate 100% Compare 'Min Income to .27' with... Scenarios used for this run Historical Data: Last Year Scenarios used for this run Historical Data: Last Year Filter nodes May 5, 2010 5:57:18 PM CEST Run Date May 20, 2010 4:24:21 PM CEST Run Date × **Key Performance Indicato** Run By rtsAdmin Run By Adam My Simulation **Rules** tested All rules as of the baseline Current Rules tested All rules as of the baseline Current Percentage of loans approved Min Income to .32 Starting Ruleflow Task Default Starting Ruleflow Task Default My Simulation - Report My Simulation - Report (2) Insdemo Server Insdem Server Production ruleset as of Jan 10 (i) http://localhost:8080/teamserver/faces/pl Ok Cancel Summarv Summarv Number of scenarios 400 Number of scenarios 400 Success Rate 100% Success Rate 100% Key Performance Indicators Key Performance Indicators Insurance KPI Insurance KPI Global eligibility results Global eligibility results Accepted 82.5% B Rejected 17.5% Accepted 77.5% Rejected 22.5% Eligibility results by states Eligibility results by states Copyright IBM Corp. 1987, 2010 100.0% 100.0% 80.0% 80.0% 60.0% 60.0% 🖉 Done 40.0% 40.0% 20.09 20.09 0.0% 0.0% CA NJ CA NJ Accepted Rejected Accepted Rejected ight IBM Corp. 1987, 2010 Side by side comparison Today Tomorrow 2 F

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# Rational Asset Analyzer Rule Discovery



# Rational Asset Analyzer and Rational Asset Analyzer for System z

Now integrates with WebSphere Operational Decision Management Announce: Oct. 26 2010 Business rule modernization

#### Available: 7 Dec 2010



#### **Delivering**...

The essentials for business rule mining of existing software assets enhancing the ability to capture, maintain and take advantage of application knowledge that can provide insight into an application's structure and its interactions with business data.

# **Business Rule Mining Capabilities**



New functionality to assist clients in their business rule mining efforts

- Allows you to identify, capture and relate business rule assets to its existing set of IT assets.
   Rational Asset Analyzer
- Introducing new asset types:
  - Business term (term)
  - Business term property (property)
  - Business rule (rule)
  - Business category (category)
  - Business process model (process model)
  - Business activity (activity)
- New dialogs, Source views and relationship detection
- Leveraging Web 2.0 technologies
- Import/Export function with WebSphere ILOG BRMS







# Business Rule Modernization: Identification ...

| * |
|---|
|   |
|   |
|   |
|   |
|   |
|   |

Properties (0)

None

#### Related data elements (13) Relationship Data element Source location Site Program type PATIENT-TOT-C:/RSSz/RAA Preg-regs/Sample Source/Sayles Sample CALCCOST User-asserted RAASAMPLEAPPLICATION App/DDS/DDS0001.TEST.COBOL/CALCCOST.cbl AMT PATIENT-TOT-C:/RSSz/RAA Preg-regs/Sample Source/Sayles Sample CALCCOST Discovered RAASAMPLEAPPLICATION AMT App/DDS/DDS0001.TEST.SRCELIB/CALCCOST PATIENT-TOT-C:/RSSz/RAA Preg-regs/Sample Source/Savles Sample DALYEDIT Discovered RAASAMPLEAPPLICATION AMT App/DDS/DDS0001.TEST.COBOL/DALYEDIT.cbl PATIENT-TOT-C:/RSSz/RAA Preg-regs/Sample Source/Sayles Sample DALYEDIT Discovered RAASAMPLEAPPLICATION AMT App/DDS/DDS0001.TEST.SRCELIB/DALYEDIT PATIENT-TOT-C:/RSSz/RAA Preg-regs/Sample Source/Sayles Sample RAASAMPLEAPPLICATION DALYUPDT Discovered AMT App/DDS/DDS0001.TEST.COBOL/DALYUPDT.cbl C:/RSSz/RAA Preg-regs/Sample Source/Sayles Sample PATIENT-TOT-MSTRUPDT Discovered RAASAMPLEAPPLICATION AMT App/DDS/DDS0001.TEST.COBOL/MSTRUPDT.cbl C:/RSSz/RAA Preg-regs/Sample Source/Sayles Sample PATIENT-TOT-PATLIST Discovered RAASAMPLEAPPLICATION App/DDS/DDS0001.TEST.COBOL/PATLIST.cbl AMT C:/RSSz/RAA Preg-regs/Sample Source/Sayles Sample PATIENT-TOT-PATSRCH Discovered RAASAMPLEAPPLICATION App/DDS/DDS0001.TEST.COBOL/PATSRCH.cbl AMT PATIENT-TOT-C:/RSSz/RAA Preg-regs/Sample Source/Sayles Sample TESTDATA Discovered RAASAMPI FAPPI ICATION 31



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2012



# Business Rule Modernization: Identification ...

|   |                     | Relate to a Business Rule                                       |   |  |
|---|---------------------|---|---|--|
| 31. 003100  |                     |   |   |  |
| 32. 003200 IF HI  |                     | Relate the IF Statement to a busi                               | ness rule.  |  |
| 33. 003300 COMPUTE CUST-DISC-PCT = F1 + F2                      |                     |   |   |  |
| 34. 003400 ELSE   |                     | Business rule:  |   |  |
| 35. 003500 DISPLAY "NO DISCOUNT".                               |                     | Provide discount for seniors                                    | •   |  |
| 36. 003600  |                     |   |   |  |
| 37. 003700 GOBACK.  |                     |   |   |  |
| 38. 003800/   |                     | The statemnight has the following o                             | data elements with related terms and term properties:   |  |
| 39. 003900 100-FACTOR2.   |                     | Data element  | Term or term property                                   |  |
| 40. 004000  |                     | 4. C-AGE  | age   |  |
| 41. 004100 IF C-AGE > 55  |                     |   |   |  |
| 42. 004200 COMPI Relate statement to a business rule            |                     |   | Relate Cancel   |  |
| 43. 004300 ELSE Relate data element to a business ter           | rm or property      |   | Trefate Galicer   |  |
| 44. 004400 SEI Show data element details                        | Rational Ass        | et Analyzer   | boyerpl   🕐 🖄   |  |
| Add a Business Rule   | Home Explo          | re Impact analysis Da   | atabase   |  |
|   | 🖉 Context : 🖹 Explo | re rule mining assets 🛛 🖉 Busines                               | ss rule summary 😝 Business rule details                 |  |
| Name of the business rule:                                      | Business rule       | detaile   | Orlest on ordine and                                    |  |
| Provide discount for seniors                                    | business rule       | uetans  | Actions Select an action                                |  |
|   | Details             |   |   |  |
|   | Documentation:      | e discount for seniors<br>a person's age is over some threshold | , give them a discount.                                 |  |
| If a person's age is over some threshold, give them a discount. |                     |   | ,   |  |
|   | Related statement   | ts (1)  |   |  |
|   | Statement Pro       | gram Relationship type  | Source location Site                                    |  |
|   | <u>n</u> <u>ora</u> | COWE User-asserted <u>C./Dim/te</u>                             | stuate/businesskulemining/stc/b13Cowe.cbe line 41m1311e |  |
|   | H User-related asse | ats (0)   |   |  |
|   |                     | (-/   |   |  |
|   | 1                   |   |   |  |
|   | 1                   |   |   |  |
| (Add) Cancel  |                     |   |   |  |
|   | IBM.                |   | Aug 10, 2010 5:37:20 PM                                 |  |
|   |                     |   |   |  |

# ODM for System z enables smart organizations to capitalize on modernization and innovation



- Faster Time to Market: New products or changes implemented in days vs. months
  - Ability to react to changes in a fast pace competitive marketplace
- Lower cost of maintenance
  - Leading to improvement operational efficiency and total cost of ownership
- Better visibility and control
  - Leading to improvement to better corporate governance
- Ability to implement the best decisions for the best changes and for the best outcome
  - Business users can see, understand and have the appropriate tools to support the needs of the organization by maximizing their IT investment
- Ability to manage and document business decisions executed in System z applications
  - Ability to generate native COBOL from rules within the WODM Rule Designer
  - Authoring rules for COBOL in business terminology
  - Ability to share business rules with Java and other COBOL applications



# **IBM ODM for z/OS Redbook**





http://www.redbooks.ibm.com/abstracts/sg248014.html





# Thank You ! Any further questions?



