Deep dive on case management

RedHat JBoss BPM Suite

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Agenda:

Case Management
what it is and how it differs

Capabilities
what can it do

Case Apps
what’s the best way to bring business value
Case Management: Overview
Case Management

What it is?

Case Management puts special focus on the actual data being handled throughout the case and less on the sequence of steps that are taken.

- Case data is the most important piece of information in case handling.
- Business context and decision making is in control of the case workers.
Case Management

How it differs from BPM?

Case management is an extension of BPM

• it comes with all capabilities BPM has,
• no need to select BPM or Case Management
• moves focus
  • from pure workflow (sequence of steps)
  • into data driven (data, business rules and process fragments)
• brings dynamic behaviour into the picture
Case Management

What about CMMN?

RedHat JBoss BPM Suite currently does not use CMMN neither for modelling nor execution, because

- majority of constructs can already be expressed with BPMN2
- CMMN is yet another notation that business users would have to learn, BPMN2 is quite popular and well understood
- does not force BPM vs Case management decision as you can use both and take advantage of already existing knowledge

* support for CMMN might be added later on based on the standard adoption and demand
Case Management: Capabilities
Capabilities

Case definition and process definition

**Case definition** is the main entry point for the business use case, e.g. insurance claim, hardware order, etc.

It defines:

- activities
- stages
- milestones

**Process definition** is the supporting construct in the case that can be invoked either as defined in case definition or dynamically to bring in additional processing.
Capabilities

Case File ...

... is like a “bucket” for all data
- any kind of data can be stored
- supports business rule evaluation on top of that data

- supports pluggable persistence strategies
- is available from within a case instance and can be accessed externally
Capabilities
Case roles

Case roles provide additional layer of abstraction for user participation in the case handling

- drives authorisation for the case instance
- can be used for user activities assignment
- can be changed at any point in time as long as case instance is active
Capabilities
Dynamic activities and processes

Dynamic activities and processes can be added to a case instance at any point in time. They do not have to be present in case definition

- Dynamic tasks
- User activities
- Service activities
- Dynamic processes
- Any process from case project
Capabilities

Stages

**Stage** represents number of activities that are meant to serve certain business purpose.

- defines completion condition
- allows to have process fragments and standalone activities
- can start some activities upon activation of the stage
- reacts to changes in case file data
Capabilities

Milestones

Milestone represents achievement within the case instance. Flags certain progress and thus can be very valuable for KPI tracking:

- defines condition to be met to be considered as achieved
- reacts to case file data
- can be triggered as many times as needed
Capabilities

Comments

Comments bring collaboration into the case instance. Case workers can easily communicate with each other to exchange information:

- are bound to the case instance
- are part of case file and thus can be used to react on them
- basic text based comments with complete operations set - (CRUD like)

Order is placed…

Will be delivered in 2 weeks

where is my order??..
Case Management: Case Apps
Case Apps

What’s that?

Case App is a tailored made application placed in the business context

- Avoid generic approach to case management
- Provide domain aspect to the environment that end users will find themselves much easier
- Allow easy scalability of individual components
- Large scale deployments with federated UI capabilities
Case Apps
Is composed of...

Case App takes into consideration
- Data being exchanged throughout the case
- Actors involved in the case
- Stages in a case to allow partitioning of the work required and eliminates redoing work
- Progress tracking based on business conditions - milestones
Case Apps

Architecture

Case App can be build up from following components

- Domain model
- Business assets (processes, rules)
- Tailor made UI that provides business context
- Cloud ready runtime environment
Case Apps
Architecture… different flavours

Case App architecture can differ depending on the scale and type of deployment

- Combined UI and execution - executable jar approach
- Distributed execution and UI
- Federated UI - single “Look & Feel” integrated with multiple case apps backed
- Traditional deployment model - packaged as ear/war
Case Management: Demo
Demo

Order IT hardware - case application

Complete example of a Case App

- UI and execution in single runtime environment
- Cloud ready - run with WildFly Swarm
- Tailor made for end users - using business vocabulary to simplify usage
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