Please Note

IBM’s statements regarding its plans, directions, and intent are subject to change or withdrawal without notice at IBM’s sole discretion.

Information regarding potential future products is intended to outline our general product direction and it should not be relied on in making a purchasing decision.

The information mentioned regarding potential future products is not a commitment, promise, or legal obligation to deliver any material, code or functionality. Information about potential future products may not be incorporated into any contract. The development, release, and timing of any future features or functionality described for our products remains at our sole discretion.

Performance is based on measurements and projections using standard IBM benchmarks in a controlled environment. The actual throughput or performance that any user will experience will vary depending upon many factors, including considerations such as the amount of multiprogramming in the user’s job stream, the I/O configuration, the storage configuration, and the workload processed. Therefore, no assurance can be given that an individual user will achieve results similar to those stated here.
Basic Case Management in IBM BPM 8.5.5

Introduction

- Basic Case and Content Management in IBM BPM
- Smarter Process capabilities
- Knowledge Worker responsibilities
- Two types of business scenarios
- Full spectrum of Process types
- Expanded Work Patterns in IBM BPM

Case Management Concepts

Knowledge Worker Interface

Case Author Interface

Process Author Interface

Demo

Summary
History – Content and Case Management in BPM

- **WID 7.0** – IBM Case Manager Integration with BPEL
  - BPEL Processes as Case Activity implementations

- **BPM 7.5.1** – IBM Case Manager Integration with BPMN
  - BPM Processes as Case Activity implementations
  - Query/Create/Read/Update Cases in BPM Integration Services
  - Common inbox (removed in BPM 8.5)

- **BPM 8.0** – Working with Documents and Folders
  - BPM process applications invoke operations on documents and folders
  - Based on the Content Management Interoperability Services (CMIS) standard

- **BPM 8.0.1** – Consuming Content Events
  - BPM process applications consume events from documents and folders
  - FileNet event handler provided
  - Open to any ECM product via published BPM API

- **BPM 8.5** – Consistent Document Management
  - BPM internal store – same CMIS-based access as external ECM systems
  - Automatic document migration and compatibility with previous BPM versions

- **BPM 8.5.5** – Basic Case Management in BPM
  - Build integrated IBM BPM and Case Management solutions
  - Utilizing embedded Content Management technology
Key IBM Capabilities for Smarter Process
IBM’s Smarter Process initiative, a combination of product and marketing improvements introduced in 2013 by IBM helped push IBM as a leader in Gartner Magic Quadrant for Intelligent Business Process Management Suites (iBPMS).

How do you handle the pace, change, uncertainty and complexity in your business?

Smarter Process is IBM’s approach for reinventing business operations to enable greater customer-centricity.

- To make end-to-end processes more customer-centric in the age of mobile, social, cloud and big data
- While continuing to drive efficiency and optimization into day-to-day operations

Source: Gartner (March 2014)
Business Scenarios Involving Knowledge Workers

- **Credit card processors** make updates to credit authorization and settlement policies based on business conditions and regulations.
- **Loan officers** make updates to new loan processes based on regulatory changes.
- **Insurance underwriters** update insurance coverage rules based on changing risk conditions.
- **Customs officers** make updates to import fees based on new tariff schedules.

**Knowledge workers:**
Flexible processes with the right level of rigor enable experts to act on new information.
Announcing - Basic Case Management Feature for IBM BPM

IBM continues to mature its Smarter Process portfolio which includes IBM Business Process Manager, IBM Case Manager, and IBM Operational Decision Manager.

IBM BPM Advanced 8.5.5 extends the IBM BPM platform with basic case capabilities derived from IBM’s IBM Case Manager offering. The basic case management feature is enabled through a separate license. IBM BPM Advanced continues to support process-oriented work patterns: including straight-through processing, and user-oriented workflow that require basic case management.

IBM BPM Advanced 8.5.5 allows customers to leverage their existing IBM BPM investments and skills and simplify the implementation and management of process-oriented solutions that require basic case management capabilities.

IBM BPM Advanced v8.5.5 includes an embedded content repository that is restricted to support the basic case management documents & folders. The restricted use content repository can be extended to support unlimited content management use cases with IBM ECM.

For content-centric workflow and full use of content management capabilities, IBM recommends IBM Case Manager. IBM Case Manager provides industry-leading case and content management capabilities to deliver solutions that identify the right information, present it in the right context, and engage people with the right information to drive business outcomes.
Example – Two Types of Business Scenarios

**Get more customers to use your credit card**

1. Define the type of consumer you think might benefit from your credit card
2. Use an application to search a database for potential candidates
3. Use an application to email the candidates
4. Review the candidates who responded to assess the effectiveness of the email and determine patterns in the list of interested consumers
5. Use an application to check the credit rating of the respondents
6. Use an application to mail the credit cards to candidates with good credit ratings

**Handle customers with credit card billing problems**

- Capture the complaint when someone called or sent an email
- Get information about the customer
- Get information about the vendor
- Collect receipts and invoices to verify the complaint
- Notify Customer Records if unusual information was found
- Notify system administrators if the billing system caused problems
- Notify Vendor Records if unusual information was found
- Resolve the dispute
IBM BPM now supports a broader spectrum of process types

- **Structured Process**: Ordered Sequence of Activities
  - ![Structured Process Diagram]

- **Some Ad Hoc**: Some Unordered (Ad-hoc) Activities
  - ![Ad Hoc Diagram]

- **Basic Case**: Some Activities with Ordered Steps
  - ![Basic Case Diagram]

- **Basic Case**: Unordered Set of Activities
  - ![Basic Case Diagram]

- **Next Step Determined By**: Knowledge Worker

- **Structured Business Objects**: Data

- **Documents and Folders (restricted use)**: Process Model
Expanded Work Patterns in IBM BPM

Mobile Users
- work with tasks and process instances

SME Authors
- define "unstructured" processes/cases
- author simple responsive UIs
- consume reusable BPDs, services, custom UIs

Business Programmers
- build processes ranging from "structured" to "unstructured"
- build integrations
- build custom/responsive UIs
- handle programming tasks

Knowledge Workers
- claim / perform tasks
- responsible for the "job" (completion of a case/process instance)
- work with instances without claiming specific tasks
- trigger "unstructured" activities based on "job" requirements and changing business conditions
- have visibility to related work ("business context")
IBM BPM Advanced and IBM Case Manager: Optimized for Complementary Types of Solutions

IBM BPM Advanced

- Full BPM, and Basic Case Capabilities
- Process Analytics
- Process Governance

IBM Case Manager

- Full Content & Case, and Basic Workflow Capabilities
- Content & Case Analytics
- Content Governance

IBM is committed to protecting every client’s investment. Both offerings are equally important, and will continue to receive product investments.

© 2014 IBM Corporation
Basic Case Management in IBM BPM 8.5.5

► Introduction
► Case Management Concepts
  • Case management concepts
  • Case activities
  • Case activity behavior
► Knowledge Worker Interface
► Case Author Interface
► Process Author Interface
► Demo
► Summary
Basic Case Management in IBM BPM – Concepts

► Case Type
  • Case definition, describing the case behavior and the case data

► Case Activities – the steps performed to complete the case
  • General attributes, describing the behavior of the case activity
  • Implementation, either a User Task, a Sub-process, or a Linked Process
  • Pre-condition, must be met to start the activity

► Case Variables
  • May be exposed as case folder properties

► Case Folders
  • Sub-folder structure created when the case is initialized

► Case Views
  • Instance details UI
  • Launch UI
Case Activity Behavior

► Activity start
  • Automatically by the process
  • Manually by the user

► Activity completion
  • Required (at least once)
  • Optional

► Repeating
  • Can only run once
  • Can be repeated

► Pre-Condition
  • Document added to Case Folder
  • Case Property changed
  • Expression referencing Case Variables

► Activity visibility
  • Visible in Process Portal
  • Hidden (background) activity
# Case Activity Behavior

<table>
<thead>
<tr>
<th>Activity Start</th>
<th>Activity Completion</th>
<th>Repeating Activity</th>
<th>Activity Pre-Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manual</td>
<td>Required</td>
<td>Run once</td>
<td>All variations allowed</td>
</tr>
<tr>
<td>Manual</td>
<td>Required</td>
<td>Repeatable</td>
<td>All variations allowed</td>
</tr>
<tr>
<td>Manual</td>
<td>Optional</td>
<td>Run once</td>
<td>All variations allowed</td>
</tr>
<tr>
<td>Manual</td>
<td>Optional</td>
<td>Repeatable</td>
<td>All variations allowed</td>
</tr>
<tr>
<td>Automatic</td>
<td>Required</td>
<td>Run once</td>
<td>All variations allowed</td>
</tr>
<tr>
<td>Automatic</td>
<td>Required</td>
<td>Repeatable</td>
<td>Allowed</td>
</tr>
<tr>
<td>Automatic</td>
<td>Optional</td>
<td>Run once</td>
<td>All variations allowed</td>
</tr>
<tr>
<td>Automatic</td>
<td>Optional</td>
<td>Repeatable</td>
<td>Allowed</td>
</tr>
</tbody>
</table>
Case Activity Implementation

► User Task
  • Single user interaction

► Sub-Process
  • Embedded in Case definition

► Linked Process
  • Separately authored BPD process

© 2014 IBM Corporation

#ibmimpact
Case Activity Pre-Condition

► Document filed
  • Optionally combined with boolean expression
  • Evaluated at case start and each time a document is filed
    – Including the starting document and documents filed in the launch UI

► Variable changed
  • Specified list of variables that are monitored
  • Optionally combined with boolean expression
  • Evaluated each time a variable value changes
    – Not including variables set as part of the case initialization

► Boolean expression only
  • Evaluated at case start and each time a variable value changes
Basic Case Management in IBM BPM 8.5.5

► Introduction
► Case Management Concepts
► Knowledge Worker Interface
  • Case/Process Instance Details
  • Case/Process Instance Search
► Case Author Interface
► Process Author Interface
► Demo
► Summary
Case/Process Instance Details

- **Case/Process Status**
- **Case/Process Instance Data**
- **Case/Process Tasks**
- **Case Folder Content**
- **Case/Process Activities**
## Ad Hoc Activity Indicators

<table>
<thead>
<tr>
<th>Icon</th>
<th>Bucket Name</th>
<th>Description</th>
<th>Option Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>✅</td>
<td>Ready</td>
<td>Manual, required, not yet triggered, ready to be triggered</td>
<td>Required</td>
</tr>
<tr>
<td>✅</td>
<td>Ready-Optional</td>
<td>Manual, optional, not yet triggered, ready to be triggered, does not have to be triggered</td>
<td>Optional</td>
</tr>
<tr>
<td>⏩</td>
<td>Working</td>
<td>Anything that has been triggered but not yet completed</td>
<td>Required/Optional</td>
</tr>
<tr>
<td>✅</td>
<td>Completed</td>
<td>Anything that has completed &quot;normally&quot;</td>
<td>Required/Optional</td>
</tr>
<tr>
<td>⏩</td>
<td>Waiting</td>
<td>Required, blocked on pre-condition; if manual then go to Ready bucket, if automatic then go to Working bucket</td>
<td>Required</td>
</tr>
<tr>
<td>⏩</td>
<td>Waiting-Optional</td>
<td>Optional, blocked on pre-condition; if manual then go to Ready bucket, if automatic then go to Working bucket</td>
<td>Optional</td>
</tr>
<tr>
<td>✅</td>
<td>Failed</td>
<td>Go to Completed bucket, regardless of activity settings; if restarted then all of the above apply</td>
<td>Required/Optional</td>
</tr>
</tbody>
</table>
Case/Process Instance Search

Search Filter

Case/Process Instances
Basic Case Management in IBM BPM 8.5.5

- Introduction
- Case Management Concepts
- Knowledge Worker Interface
- **Case Author Interface**
  - Web-based authoring
  - Case editor
- Process Author Interface
- Demo
- Summary
Web-based Authoring – Cases and Related Artifacts

Case/Document Type Editor
Basic Case Editor – Overview

- Similar for Cases and Processes
- New document creates new case
- Document properties are mapped to case variables

© 2014 IBM Corporation
Basic Case Editor – Activities – General

- Required vs. optional
- Activity General Settings
- Other activity behavior
Basic Case Editor – Activities – Implementation

Activity Type and Implementation

User Task Settings
Basic Case Editor – Activities – Data Mapping

Mapping from/to Case variables
Basic Case Editor – Activities – Preconditions

Activity

Precondition

Optional

Expression

Activity Precondition

Optional Expression
Basic Case Editor – Variables

Case variables
Accessible on Case folder
Basic Case Editor – Folders

Sub-folder structure
Basic Case Editor – Views

Case launch and details UIs
Basic Case Management in IBM BPM 8.5.5

➤ Introduction
➤ Case Management Concepts
➤ Knowledge Worker Interface
➤ Case Author Interface
➤ **Process Author Interface**
  • Activity extensions
  • Ad-hoc Activity
  • Instance Owner
  • Terminate End Event
➤ Demo
➤ Summary
Ad-hoc Activity in a Process

Unwired Activity (user-triggered)
Ad-hoc Activity – Implementation and Behavior

- Ad-hoc Activity implementation
  - Human Service
  - Sub-process
  - Linked process

- Ad-hoc Activity behavior
  - Automatic / Manual
  - Required / Optional
  - Repeatable
  - Hidden
  - Pre-conditions

Activity Implementation

Activity Behavior
Case/Process – Owner Team – New Capabilities

- Can trigger all ad-hoc activities defined in the BPD (irrespective of any activity-specific team settings)
- See instances for which they act as "owner" on the instances list (need to explicitly follow an instance)
Case/Process – Owner Team – Aligned Capabilities

- Visibility to the Process Performance top-level dashboard tab
- Within the Process Performance dashboard, they have visibility to the BPDs they are owners of
- Modify process instance due dates
- Make critical path changes
- Assign Tasks for the owning instance (this is an overlap with Team Manager)
- Reassign Tasks for the owning instance (this is an overlap with Team Manager)
- Reprioritize Tasks for the owning instance (this is an overlap with Team Manager)
- Change due date of Tasks for the owning instance (this is an overlap with Team Manager)
Basic Case Management in IBM BPM 8.5.5

- Introduction
- Case Management Concepts
- Knowledge Worker Interface
- Case Author Interface
- Process Author Interface
- Demo
- Summary
Basic Case Management in IBM BPM 8.5.5 – Demo

► Scenario
  • Credit Card Dispute Management

► Case
  • Manage Dispute Item
    – Implements the work required to handle a credit card dispute.
    – Initiated by the customer calling the bank and a customer representative

► Case activities
  • Manage Dispute (automatic/required)
    – The main activity where the review takes place and a decision made
  • Close Case (automatic/required)
    – Final step to contact customer and discuss resolution of the dispute
  • Contact Customer (optional/manual/repeatable)
    – Allows the case team to randomly send updates to the customer through the case progression
  • Process Chargeback (optional/manual)
    – Started by a case owner when a refund needs to be processed
Basic Case Management in IBM BPM 8.5.5

- Introduction
- Case Management Concepts
- Knowledge Worker Interface
- Case Author Interface
- Process Author Interface
- Demo
- Summary
Announcing - Basic Case Management Feature for IBM BPM

IBM continues to mature its Smarter Process portfolio which includes IBM Business Process Manager, IBM Case Manager, and IBM Operational Decision Manager.

IBM BPM Advanced 8.5.5 extends the IBM BPM platform with **basic case capabilities** derived from IBM’s IBM Case Manager offering. The basic case management feature is enabled through a separate license. IBM BPM Advanced continues to support process-oriented work patterns: including straight-through processing, and user-oriented workflow that require basic case management.

IBM BPM Advanced 8.5.5 allows customers to **leverage their existing IBM BPM investments and skills** and **simplify the implementation and management** of process-oriented solutions that require basic case management capabilities.

IBM BPM Advanced v8.5.5 includes an **embedded content repository that is restricted to support the basic case management documents & folders**. The restricted use content repository can be extended to support unlimited content management use cases with IBM ECM.

For content-centric workflow and full use of content management capabilities, IBM recommends IBM Case Manager. IBM Case Manager provides industry-leading case and content management capabilities to deliver solutions that identify the right information, present it in the right context, and engage people with the right information to drive business outcomes.
IBM BPM Advanced and IBM Case Manager:
Optimized for Complementary Types of Solutions

IBM BPM Advanced

- Full BPM, and Basic Case Capabilities
- Process Analytics
- Process Governance
- IBM BPM Platform

IBM Case Manager

- Full Content & Case, and Basic Workflow Capabilities
- Content & Case Analytics
- Content Governance
- IBM ECM Platform

IBM is committed to protecting every client’s investment. Both offerings are equally important, and will continue to receive product investments.
Questions?

Impact 2014
Be First.
#ibmimpact
Thank You

Impact 2014