



Deep dive on case management

RedHat JBoss BPM Suite

Maciej Swiderski
Principal Software Engineer

Kris Verlaenen
Senior Principal Software Engineer

03-05-2017

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

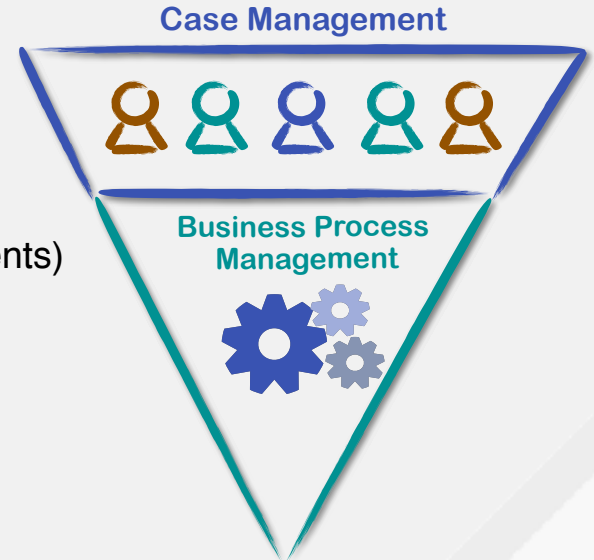
- Case data is the most important piece of information in case handling
- Business context and decision making is in control of the case workers

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

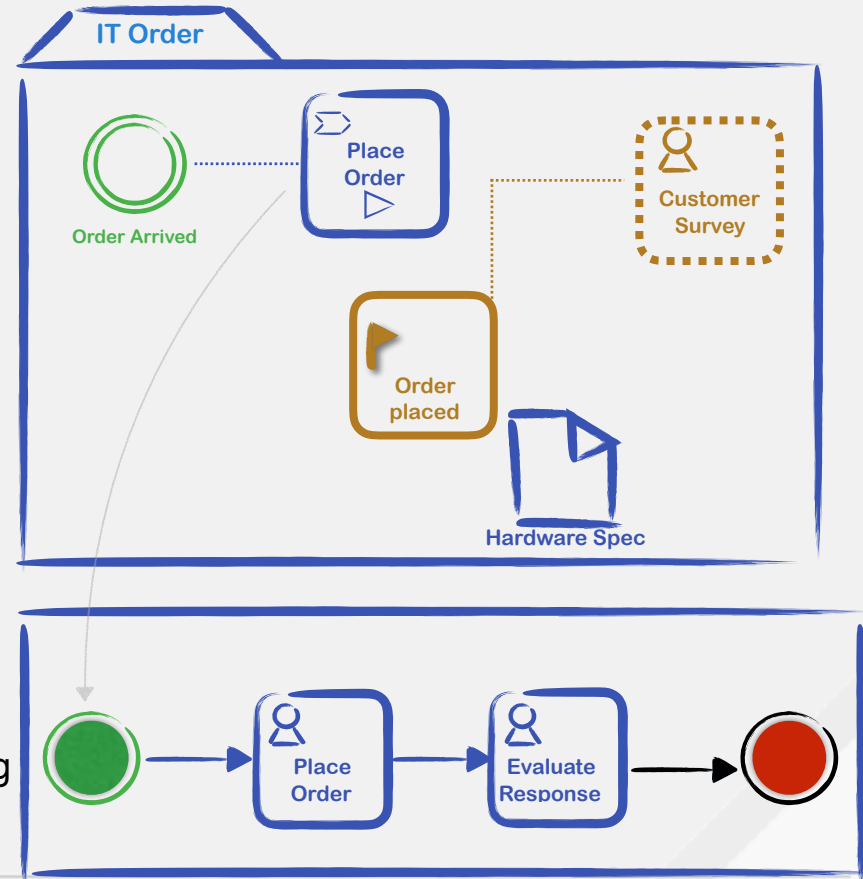
Case definition and process definition

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

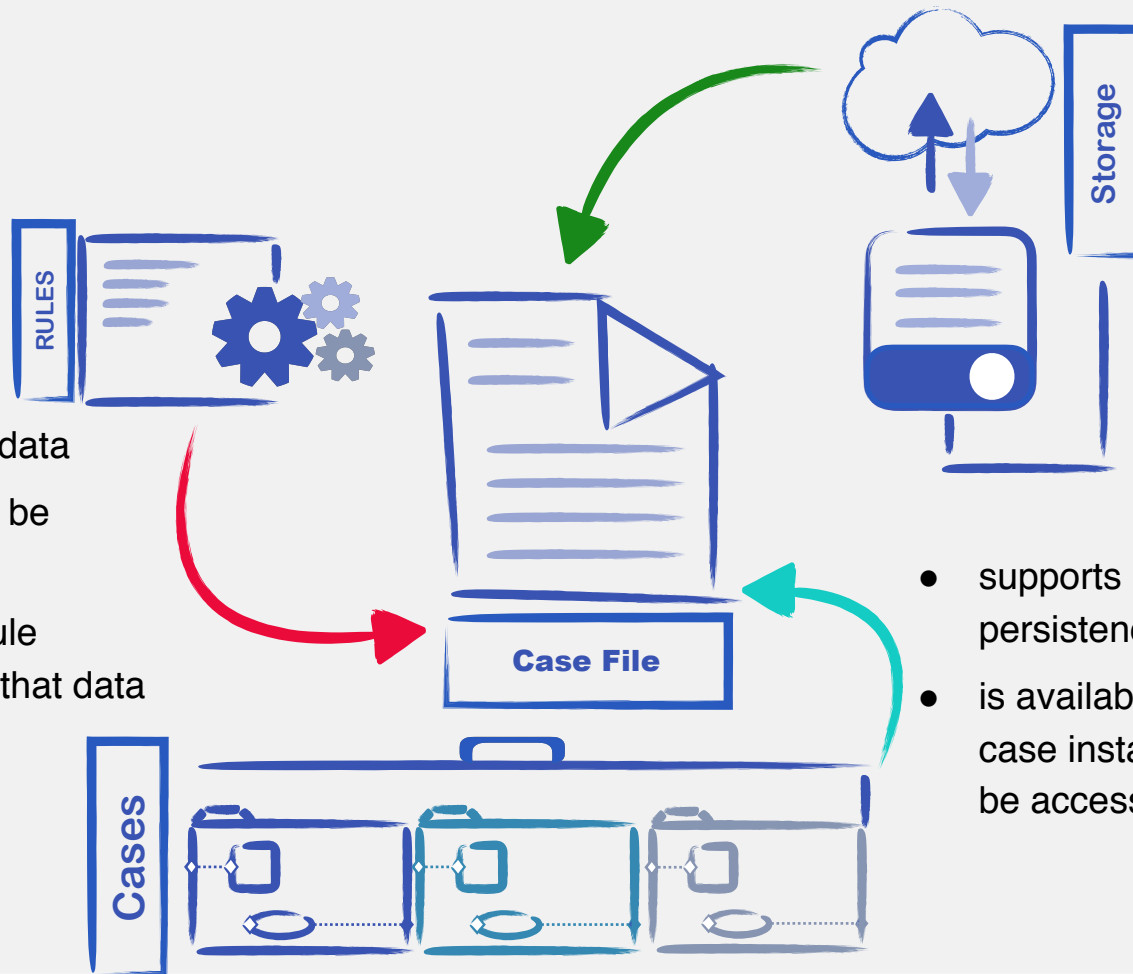


Capabilities

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



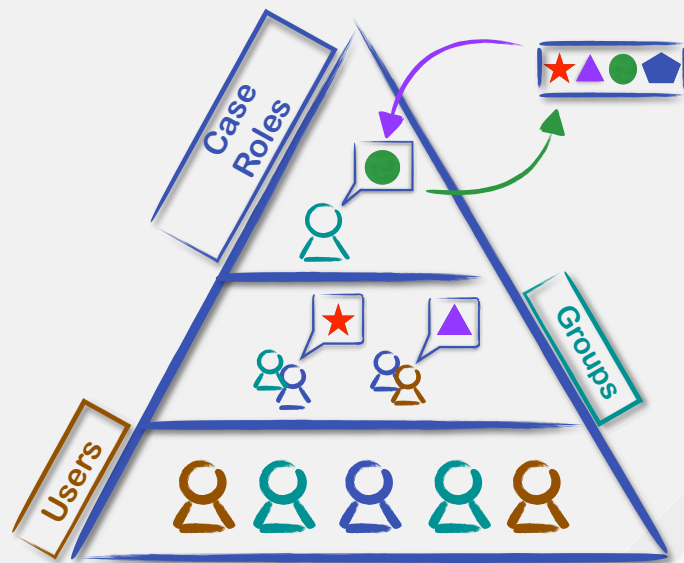
- supports pluggable persistence strategies
- is available from within a case instance and can be accessed externally

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

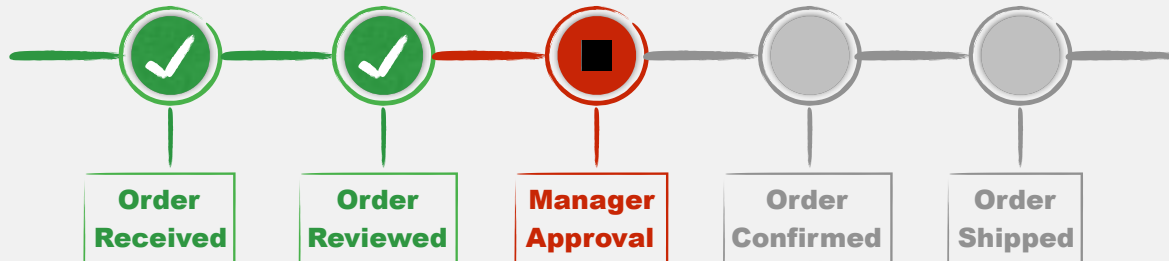


Capabilities

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

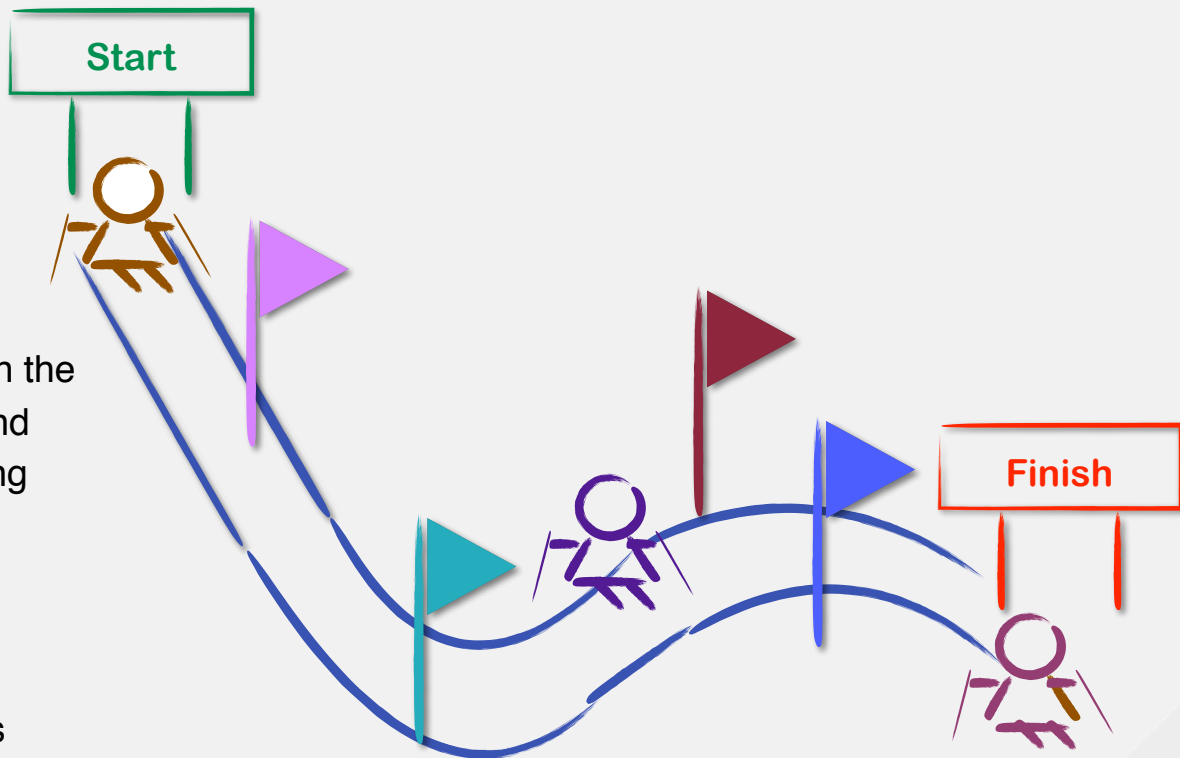


Capabilities

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

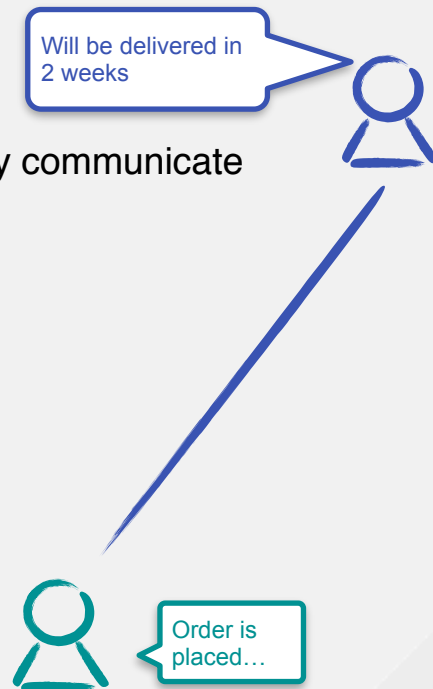
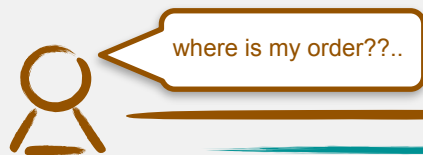


Capabilities

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)



Case Management: Case Apps

Case Apps

What's that?

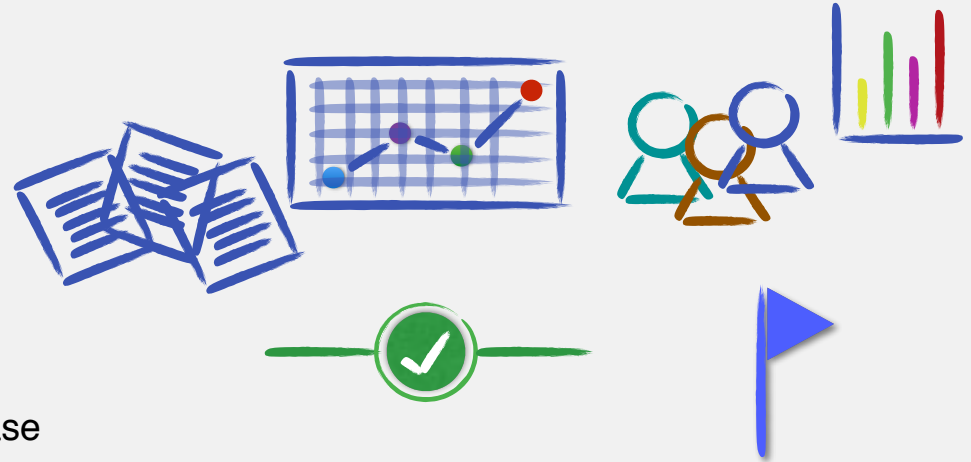
Case App is a tailored made application placed in the business context

- 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

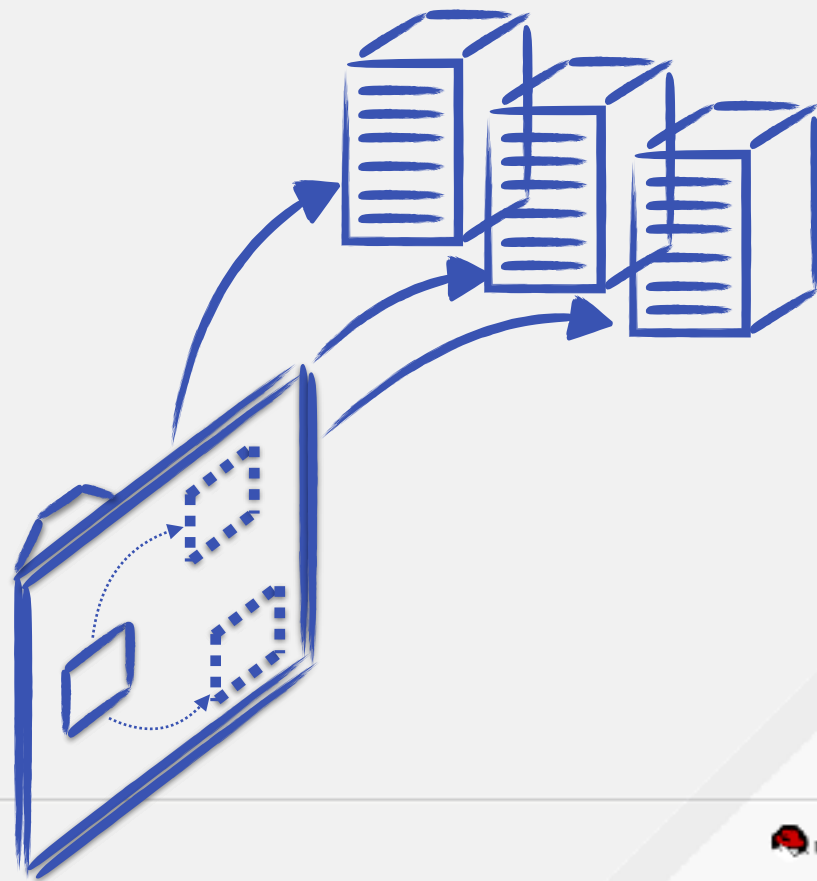
- Data being exchanged throughout the case
- Actors involved in the case
- Stages in a case to allow partitioning of the work required and eliminates redoing work
- Progress tracking based on business conditions - milestones

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

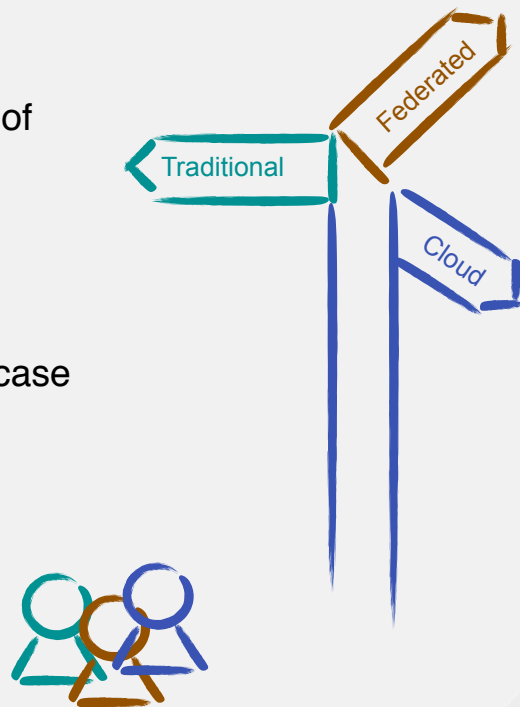


Case Apps

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





THANK YOU



plus.google.com/+RedHat



facebook.com/redhatinc



linkedin.com/company/red-hat



twitter.com/RedHatNews



youtube.com/user/RedHatVideos

The logo consists of a white speech bubble shape with a tail pointing downwards. Inside the bubble, the words "RED HAT" are in a smaller, bold, sans-serif font, and "SUMMIT" is in a larger, bold, sans-serif font, both in red.

**RED HAT
SUMMIT**

**LEARN. NETWORK.
EXPERIENCE
OPEN SOURCE.**