Setup and Maintenance Factors of Adaptive Case Management Systems

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Content

• Motivation
• Approach: Adaptive Case Management
• ACM concepts
• ACM setup and maintenance factors
• Contribution – performer process creation
• Discussion
BPM - prescriptive

ACM – goal oriented
Motivation

• The effort of analyzing a process and all potential variants for unstructured processes and knowledge work.

• Monitoring and improving the implemented processes

• BPM focus is automation high-volume, low-value processes

• ACM is focused on low-volume, but high value work

• Our approach is organized around defining goals and rules.
SPECTRUM OF WORK PROCESSES

repetitive exploitation    emergent innovation

ERP    BPM    ADAPTIVE

AUTOMATION
PROCESS

KNOWLEDGE
PEOPLE

cost - reliability    innovation - outcome

low value, high volume    high value, low volume

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Approach: ACM

• Preliminary setup creates backend data and content interfaces, user authorizations, and sample library.

• Allows users to add and modify work tasks at runtime to handle unpredictable events while working towards goals.

• Allow BPM-like flow-diagrams, where required for specific mandatory process fragments or for orchestration.

• Enable performers to set new process goals, add tasks, add rules, add performers and save result as new template.
Process versus Evolution

ACM Setup Library

EMPOWERMENT

Skills Experience

Business Architects

Process Analysts

IT Operations

Process Owners

Governance

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ACM Concepts and Structure

- Goals
- Library
- Customer Database
- Entities
- Content
- Tasks
- Cases
- Contract Proposal
- Policy
- Authorization
- User Interaction
ACM Ontology

Source: Papyrus Inbound/Outbound Concept 2001
ACM: Goal-Oriented Cases

- Case goals
  - web interaction
    - Running Process
      - ProcessTemplate: Workflow Process
  - partner contact
    - Workflow Process
      - ProcessTemplate: Workflow Process
  - call center
    - Goal ad2
      - ProcessTemplate: false
- Optional alternatives
  - Service rating
    - service rating
      - MultiProcessDependent: true
  - Customer in shop
    - MultiProcessDependent: true
- Activity & People skill
  - customer buys
    - MultiProcessDependent: true
  - service rating
    - MultiProcessDependent: true
- Embedded rules
  - MultiProcessDependent: true
WORK FLOW VERSUS ADAPTIVE PROCESS

improvement cycle

Requirements

Complex requirements gathering.

Planning

Process flowcharts, exceptions, events

Implement

interfaces, GUI, rules and content coding

Review

Complex changes have to be reviewed/tested.

USERS CREATE ACTIVITIES INTERACTIVELY FROM ELEMENTS IN A TEMPLATE.

Actors

user defined

innovation

User create templates and can also change the process on the fly.

Templates
ADAPTIVE PROCESS INNOVATION
PROJECT MANAGEMENT, VERSIONING, DEPLOYMENT, ENACTMENT, INNOVATION

REPOSITORY
METADATA
ACTIVITIES
CONTENT
RULES
GUI

ACTIONS
content
goals
entities
rules

Architecture

User-Trained Agent

Process Owner

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ACM and Innovation
13
receive application

print & send policy to customer

create policy, update app, archive copy

handle financials

sign off & customer signature

review & approve risk

ACCESS CRM

DISTRIBUTE

ACCESS APPL

CONTRACTS

CONTENT STATE
**ACM Setup and Maintenance**

**Maintenance**

Business GUI

ACM Administrator

ACM Consultant

**Domain Setup**

Admin GUI

**Goals**

Ad-hoc Elements

UTA learn

Domain Templates

Data Objects

Repository

ACMbase system

**Installation**

**ACM Administrator**

create

**ACM Consultant**

create

create

create

extend

reuse

driven by

Knowledge Worker

create
Scenario

Service Contract Management (SCM)

Contract Manager

Contract Proposal

Customer Database

Consultant

Contract Manager

Customer Database

Service

Policy

Support team

Customer

Authorization

Contract

Receive a Service Request

Compose a Contract

Define Services

Negotiate with Customers

Approve a Contract

Execute Services

Audit a Contact

Report a Contract

Renew a Contract

Audit a Contact

Report a Contract

Renew a Contract

Contract Maintenance
Discussion

• Question 1: The authors demonstrate setup and maintenance factors using ACM. What are the experienced benefits and differences?

• Question 2: Differences to various ACM solutions and classical BPM implementations?