

Take your next step into the future of case management with IBM Business Automation Workflow

Continue your case journey
by adding value for the future
with IBM Business
Automation Workflow.

Today's operational challenges require a re-imagining of the way you work.



01

Customer demand is volatile

...requiring the ability to quickly scale up or down

- 20X spikes in unemployment claims
- 19X spike in mortgage forbearance requests



02

Industries are being disrupted

...requiring rapid creation of new products and services

- New apps to discount or restructure debt and payments
- New types of loans to help employees and businesses



03

Remote employees are struggling to get work done

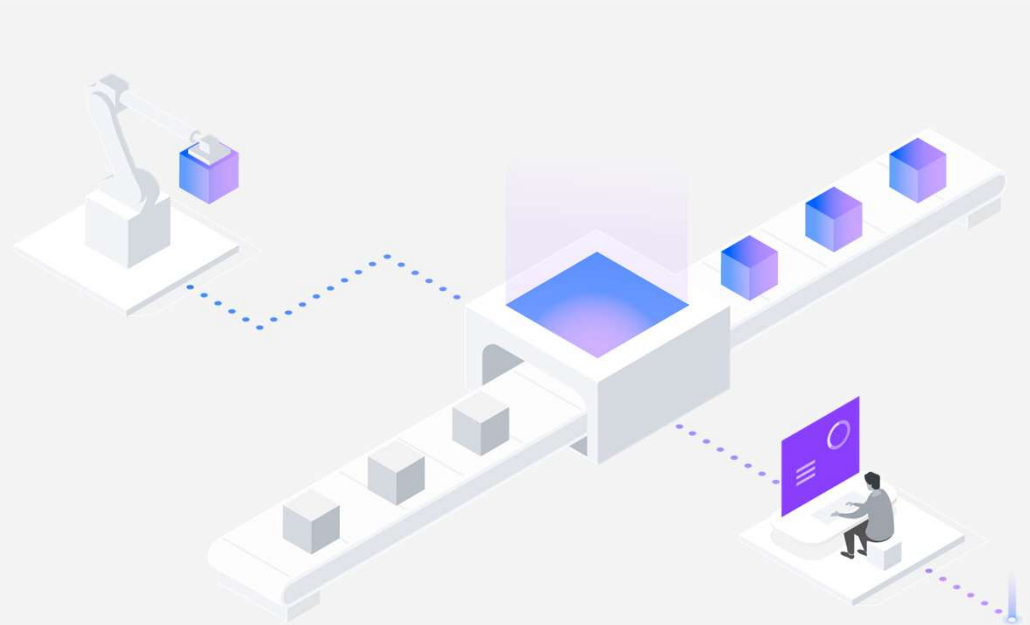
...requiring new capabilities to remain productive

- Face-to-face review/approval must now be electronic
- Paper documents must be digitized for remote access

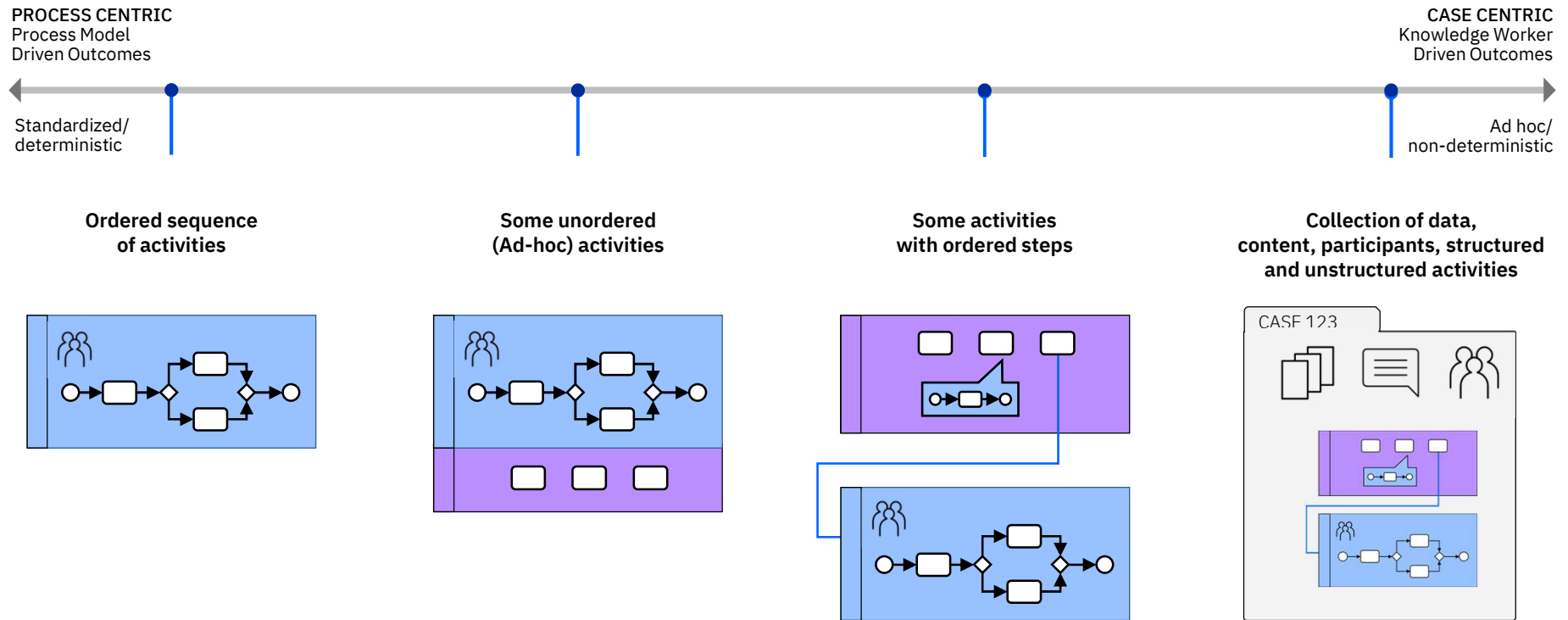
We combined our market-leading offerings so that you can derive positive business outcomes from both unpredictable and knowledge-driven situations without having to choose.

With your future in mind, we upgraded IBM Case Manager to create **IBM Business Automation Workflow**.

Built on the same engine as ICM, BAW includes *all the case features you know and love*, complemented by an additional suite of market-leading process capabilities available without migration or code change.

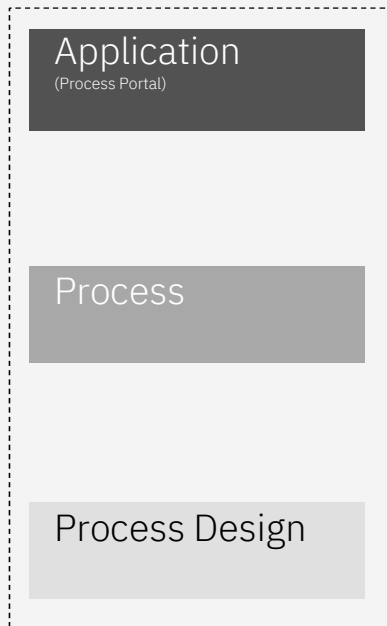


IBM BAW opens the door to innovation with a spectrum of digital work patterns while still maintaining its ICM core.



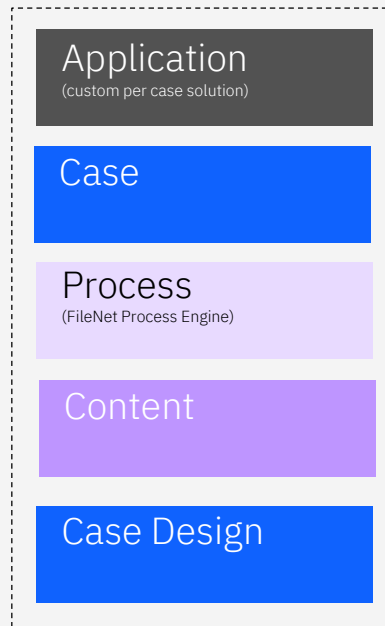
We combined the elements of ICM and BPM to enable...

Business Process Management



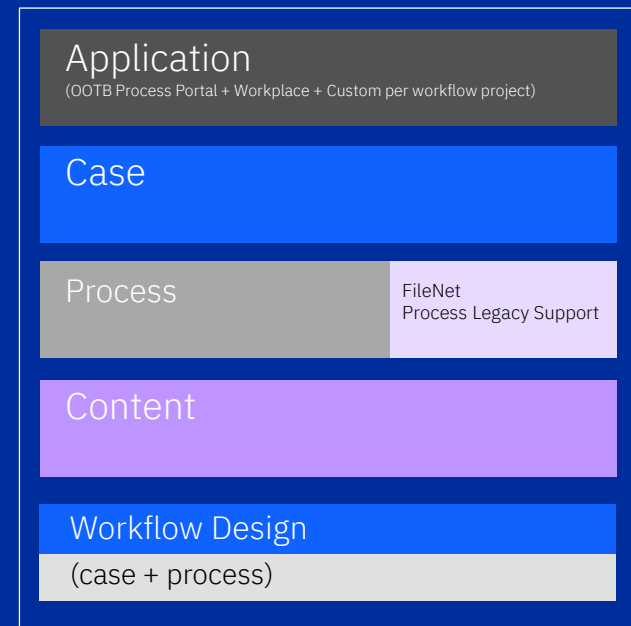
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IBM Case Manager



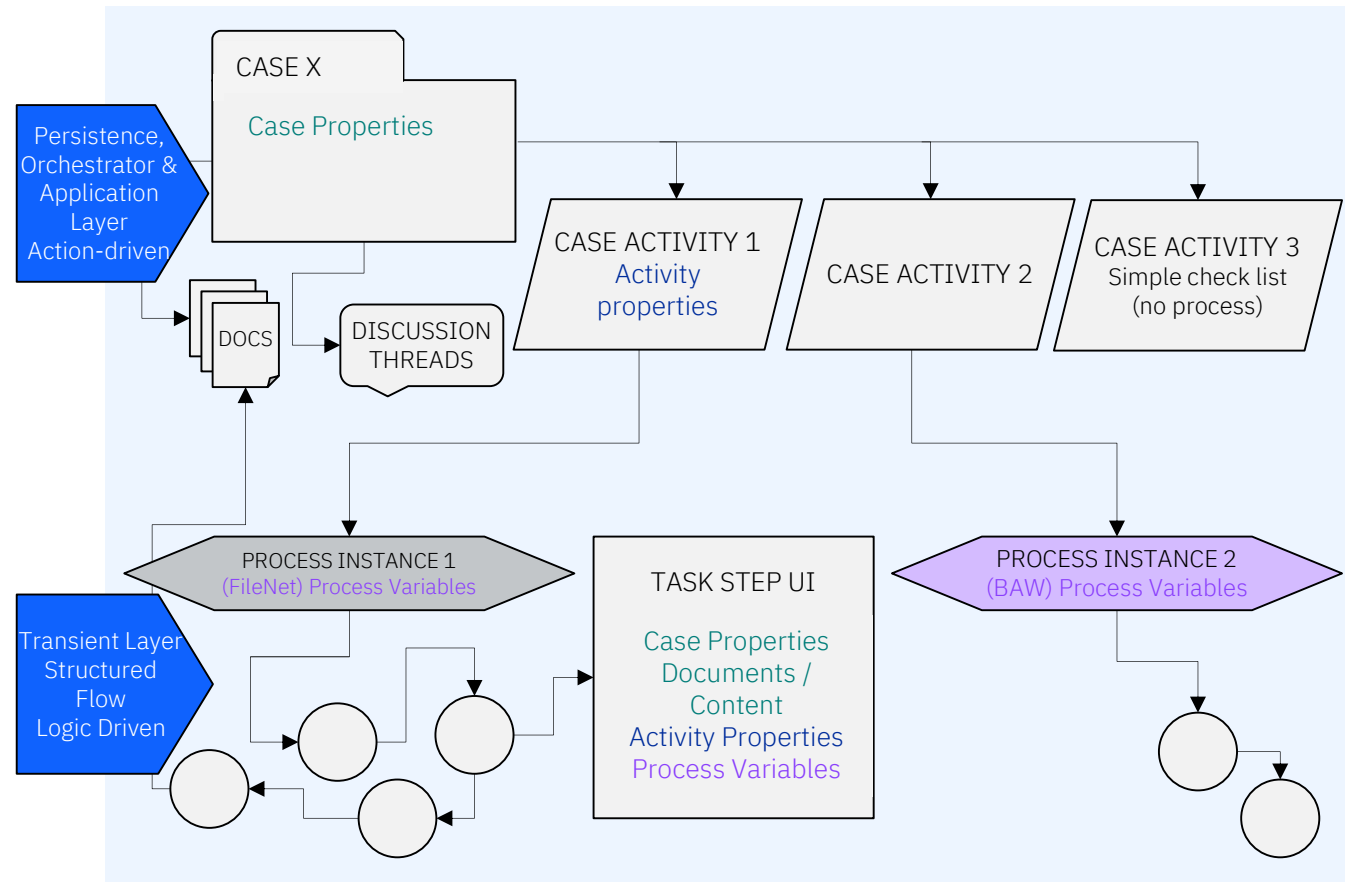
your full case potential with IBM Business Automation Workflow.

IBM Business Automation Workflow



IBM BAW supports the existing case management capabilities while introducing several key enhancements and opportunities for infusing additional process management features and functionalities.

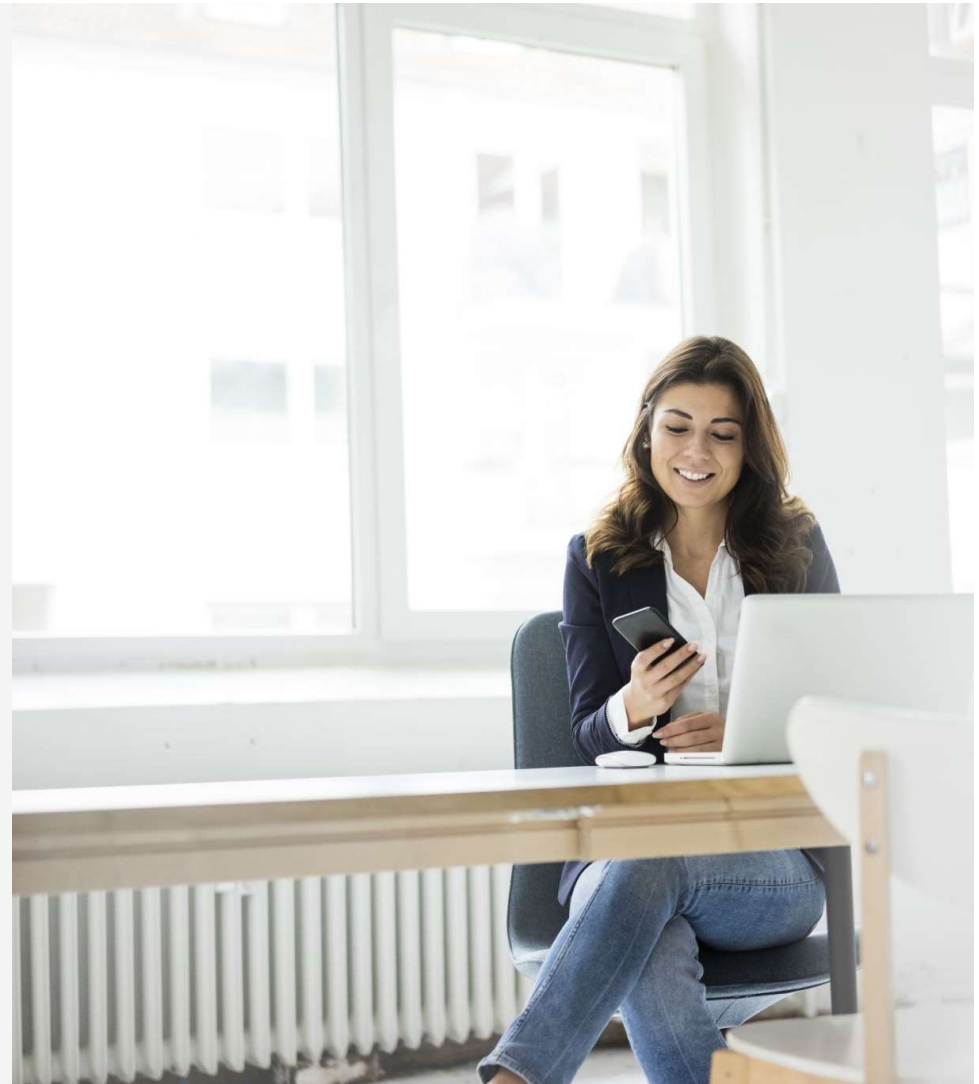
The updated architecture uses structured persistence and orchestration to ensure cases execute processes at the right time.



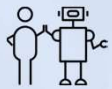
IBM Business Automation
Workflow is the next step in
case management.

IBM Business Automation Workflow introduces synergies across the platform through a [simple upgrade](#).

- Existing case solutions [remain as-is, no need to rewrite applications or migrate code](#) from the latest Case Foundation/Manager
- [Single Workflow offering](#) easily enabling Cases complete with BPM processes
- Improved [integration](#) with other Digital Business Automation Platform capabilities
- Offering is also packaged as part of [IBM Cloud Pak for Business Automation](#)



Unlock a new suite of innovative features for revolutionizing your automation capabilities.



Eliminate non-value work

Empower your business by orchestrating Robot Tasks to reduce costs and improve efficiency



Boost productivity

Enable users with low code to easily build custom User Interfaces (using coaches) and integrations via external services and automation services



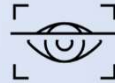
Increase throughput

Get work done faster with AI-infused capabilities like intelligent task prioritization and decision recommendation



Accelerate operational intelligence

Gain actionable insights with AI-powered dashboards for enhanced understanding, predictability, and agility



Improve work management

Access a 360° view of workflow instances, activities, and content for managing and completing work across the organization



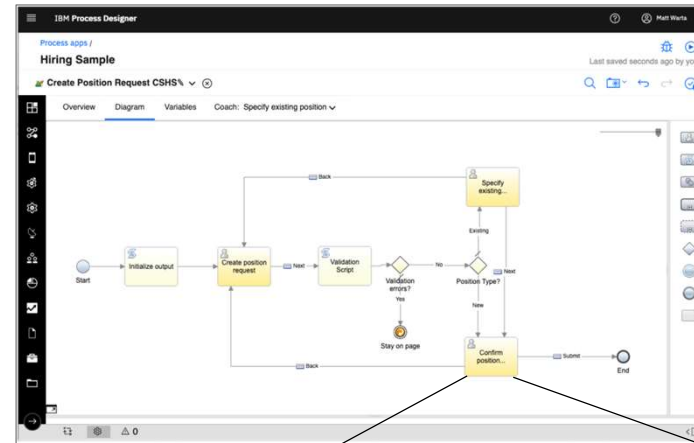
Reduce operating costs

Achieve faster and more flexible solution deployments enabled by OpenShift Container Platform to significantly reduce operating costs

Experience **client-side human services**, the latest in low-code human services

Client-side human service enables you to build, test, and run interactive tasks, dashboards, or user interfaces.

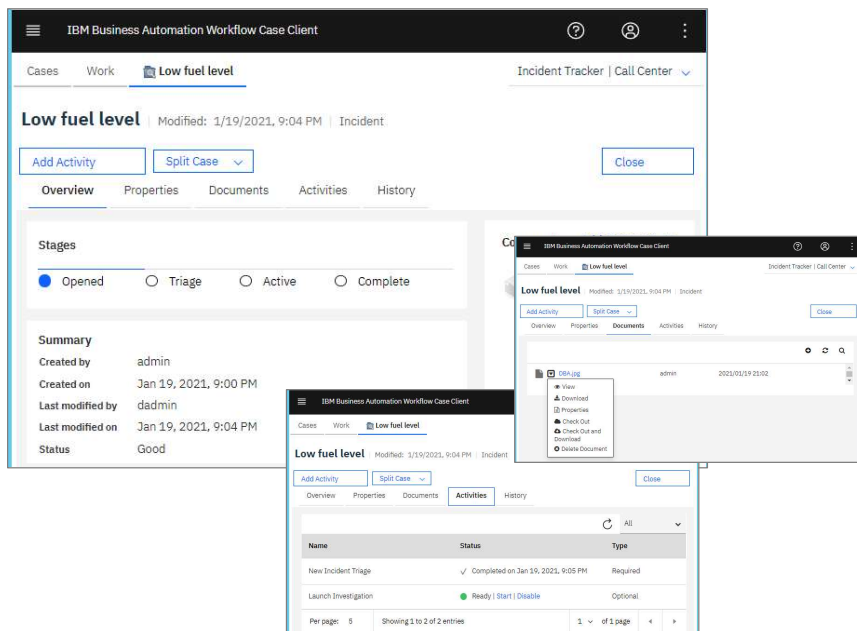
- Model multi-page flows with **no code**
- Design UIs with a **drag and drop** WYSIWYG editor
- **Build once** and use on multiple form factors like phone, tablet, or desktop
- Create and edit Client-side human services (CSHS) **directly in the case and process designer**
- **Test and run** CSHS directly in the web browser



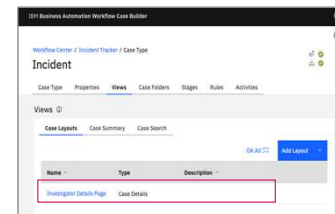
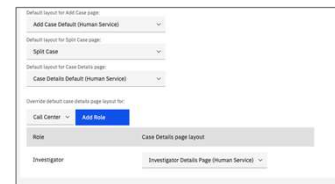
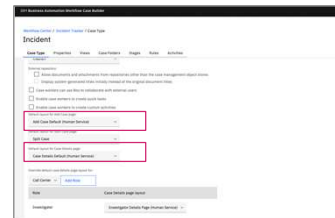
The screenshot shows a web browser view of the 'Confirm Position Request' form. The form is divided into two main sections: 'Request data' and 'Position data'. The 'Request data' section includes fields for 'Requestion number: (req.local.requestion.reqNum)', 'Hiring manager', 'Employment type', 'Department', and 'Number of employees'. The 'Position data' section includes fields for 'Position type', 'Location', 'Starting date', and 'Job title'. Below these sections is a 'Qualifications' section. On the right side of the browser view, there is a 'Drag a component to your page' panel with a search bar and a list of available components including Button, Check box, Check box group, Date/time picker, Decimal, Input group, Integer, Masked text, Multi select, Password, Plain text, Pop-up menu, Radio button, Radio button group, Rich text, and Service data table.

Access new case page layouts and toolkits and deploy new case pages using client-side human services

Example



Case pages built using client-side human services



- Default pages for both Add and Details able to be assigned to a case type
- Reuses them UI framework for the processes allowing reuse of stills and components
- Custom Case Details pages can be assigned to a specific role(s) to restrict impact visibility and controls
- Custom Add and Case Details pages can be created and edited and used in place of the default pages
- Clicking the name of the custom CSHS page will open it in the CSHS editor

One place to manage it all with the power of Workplace

Single View

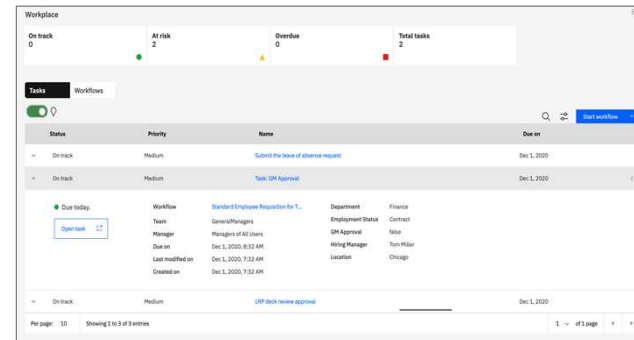
Access and manage all of your tasks, activities and instances across both process and cases in a single, consolidated view.

Maintain Legacy User Interfaces

Workplace supports instances using the legacy Case UI framework which can be managed along those using the CSHS toolkit.

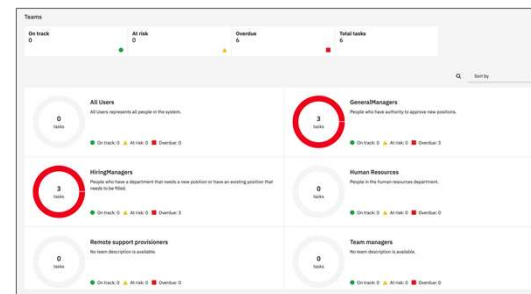
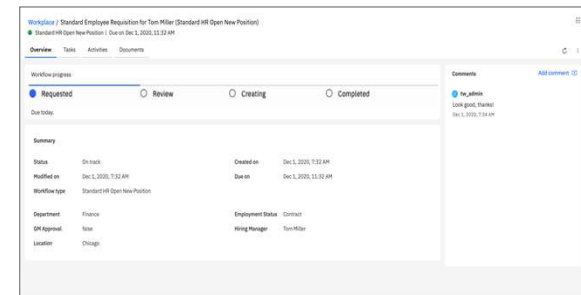
Federate Automatically

- Work lists and dashboards are federated automatically to support your work
- Exclusively runs on containers but can also federate the BAW server deployed on traditional VMs



One place to initiate, search, prioritize and complete work.

360 view of a workflow instances: stages, activities, data, documents, comments, history.



Work management across teams and individuals.

Employ Intelligent Work Management to track and enhance performance across your workplace

AI Infused Workplace:

Manage Work Performance

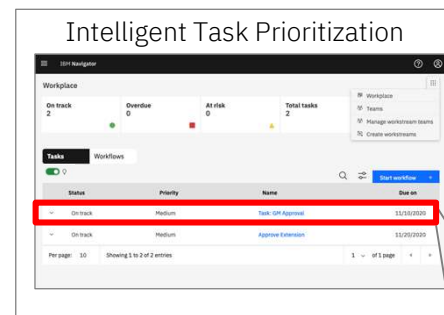
Intelligent Task Prioritization to improve team throughput with an Extensible Self Training ML server.

Decision Support – Tech Preview

Decision Recommendations to increase quality and consistency of task completion with an exposed API.

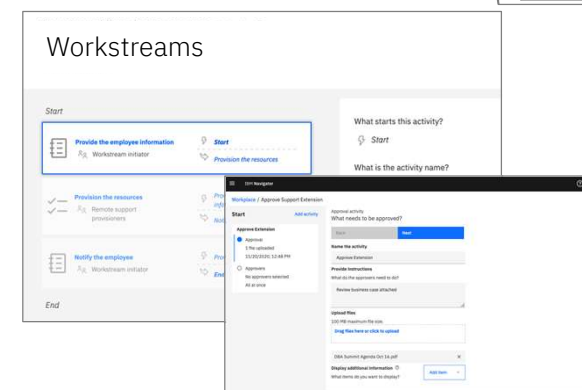
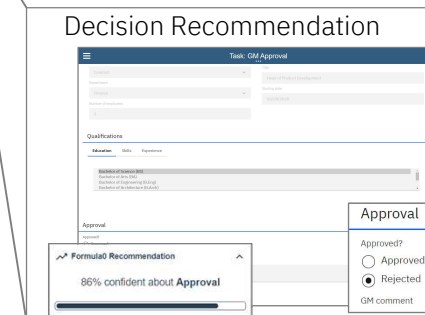
Situational Workflow Configuration

Configuration of productivity workflows at time of need within minutes.



What should I work on based on organizational goals?

How should I complete the task?



How do I initiate and complete situational workflows?

Empower end-users to own their automation journey with Workstream Services

Automate simple processes, quickly

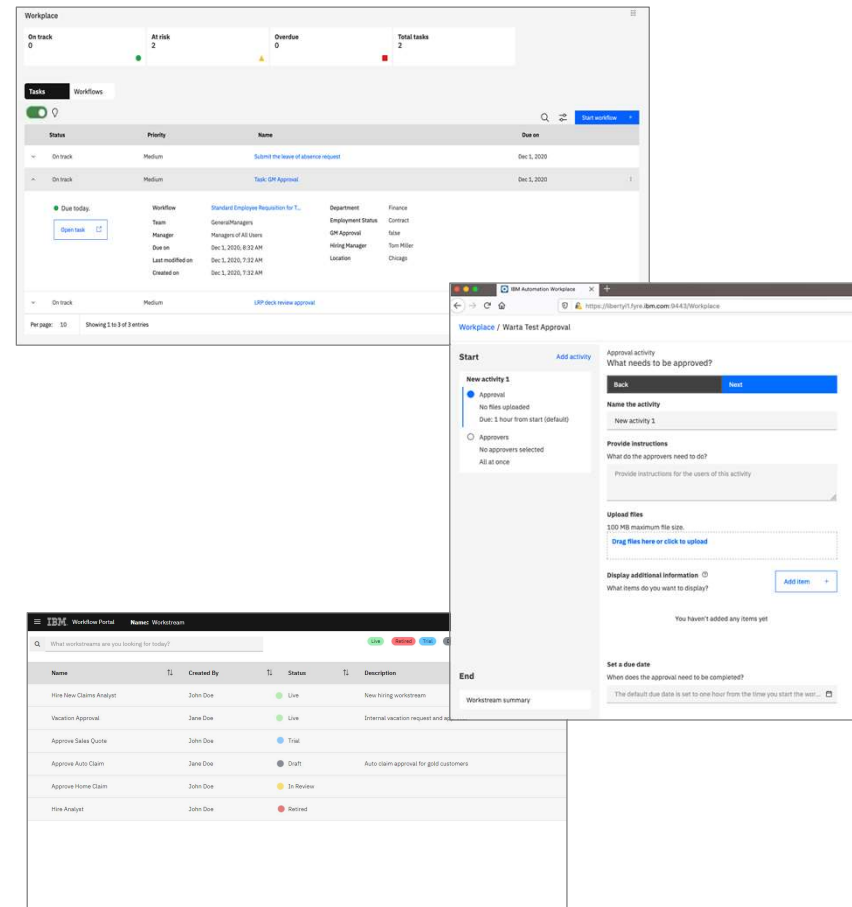
- Users of any skill level can configure a simple automation in minutes, no wait or compiling required
- The UI is automatically constructed from the data and documents configured within the activity, with the option to customize the layout

Enable your employees, safely

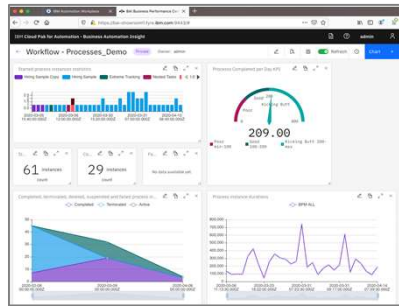
- IT-governed processes provide guardrails that prevent compliance missteps
- The editor will always produce a runnable workstream, even if the activity is not fully configured

Deploy the way you need

- Available as part of IBM Cloud Pak for Automation and now as a SaaS, hosted on the IBM Cloud
- Microservices architecture that utilizes Docker and Kubernetes to support autoscaling, continuous availability, and continuous upgrade

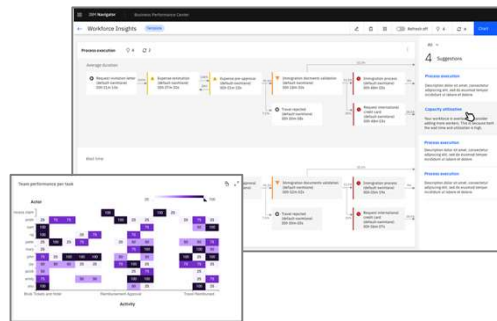


Use Operational Intelligence for Business Users powered by BAI to extend beyond reporting business outcomes to controlling them



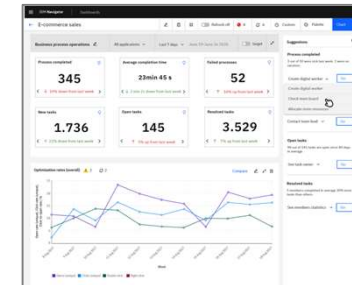
No-Code Business Dashboards

- Process, Case, Decision, & Content Monitoring
- KPIs, Charts, and Reports
- Tables and Heatmaps



Workforce Management

- Team Throughput
- Team Capacity
- Utilization Rate
- Cycle time and by Worker efficiency



Goal Based Business Scorecards

- Suggestions
- Predictions
- Alerts

What's Happening Now?	What do I Need to know?	What do you Suggest?	What Should I do?	What Can I Expect to happen?	What do I need to know to avoid Jeopardy
Visibility / Monitoring	Alerts and Notifications	Recommendation / Suggestions	Automation / Action	Prediction	Situational Awareness / Prevention

Drive new levels of innovation with AI/ML Enablement

Natural Language Assistant Tech Preview


Natural Language query capability to explore your performance data at time of need.

Pre-curated Data Lake

Enable data scientists for AI/ML projects by infusing pre-curated set of operational data in a data lake.

Security & Data Protection

Anonymization, Pseudonymization, and Data Removal polices.



Welcome to the Verdi DBA Blue Demo 2

Get started by typing sentences to query your data lake. E.g.

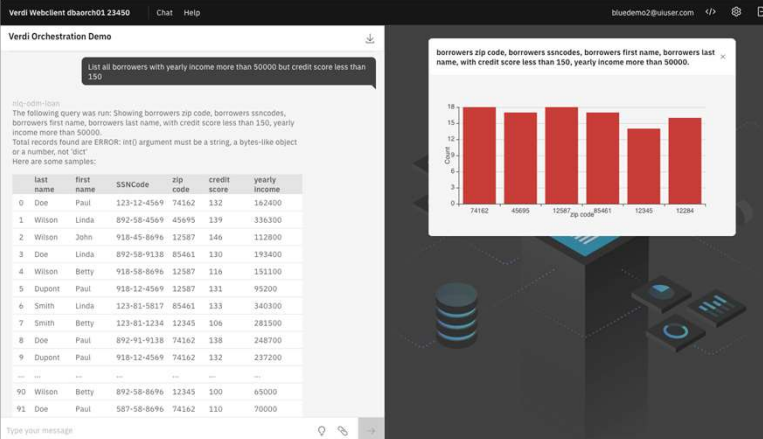
- List all borrowers with yearly income more than 50000 but credit score less than 150
- What is the total amount for borrowers with credit score more than 500

Then, visualize your data or export it using sentences like:

- Plot the data in a bar graph by zip code
- Graph the data in a donut chart
- Create a histogram
- Export this data to a CSV file

Or you can ask for more examples using:

- Show me some examples



Verdi Webclient dbaorch01 23450 Chat Help blueidemo2@uluser.com

Verdi Orchestration Demo

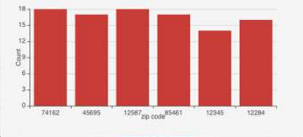
List all borrowers with yearly income more than 50000 but credit score less than 150

SQL: select * from borrowers where yearly_income > 50000 and credit_score < 150

The following query was run: Showing borrowers zip code, borrowers ssn codes, borrowers first name, borrowers last name, with credit score less than 150, yearly income more than 50000. Total records found are ERROR: (int) argument must be a string, a bytes-like object or a number, not 'list'

	last name	first name	SSNCode	zip code	credit score	yearly income
0	Doe	Paul	123-12-4569	74162	132	162400
1	Wilson	Linda	892-58-4569	45695	139	336300
2	Wilson	John	918-45-8696	12587	146	112800
3	Doe	Linda	892-58-9138	85461	130	193400
4	Wilson	Betty	918-58-8696	12587	116	151100
5	Dupont	Paul	918-12-4569	12587	131	95200
6	Smith	Linda	123-81-5817	85461	133	340300
7	Smith	Betty	123-81-1234	12345	106	281500
8	Doe	Paul	892-91-9138	74162	138	248700
9	Dupont	Paul	918-12-4569	74162	132	237200
...
90	Wilson	Betty	892-58-8696	12345	100	65000
91	Doe	Paul	587-58-8696	74162	110	70000

borrowers zip code, borrowers ssn codes, borrowers first name, borrowers last name, with credit score less than 150, yearly income more than 50000.

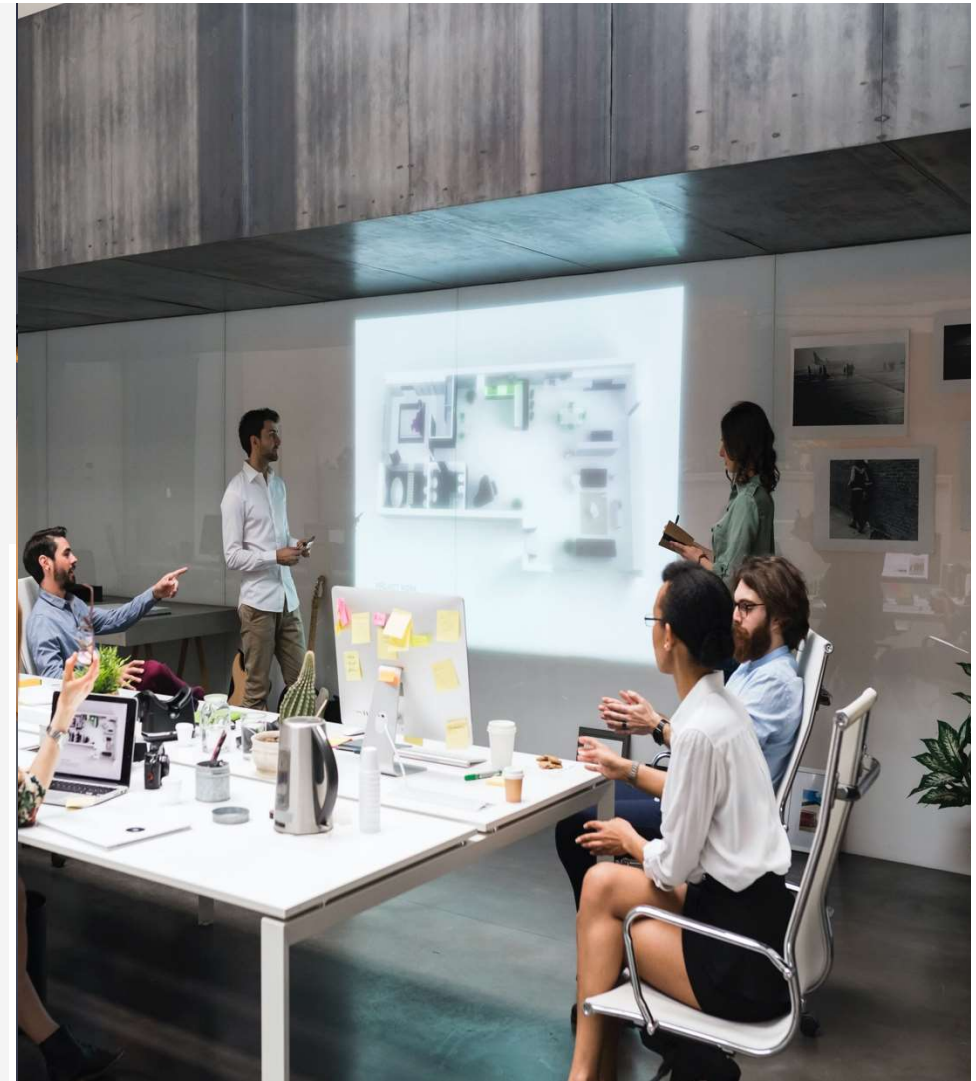


zip code	Count
74162	1
45695	1
12587	2
85461	1
12345	1
12344	1

Achieve new levels of efficiency and optimization with integration to our **market-leading BPM process engine**

Suite of new capabilities accessible to you:

- Playback feature in Process Center for immediately running a model at any time
- Process versioning and instance migration
- Robust set of UI tools and coaches with the SPARK/BPM UI toolkit for creating flexible UI's
- Enhanced integration tools for REST/WS
- Event Support (start trigger, intermediate (correlation to instance) content, timer, error, end, terminate, custom)
- Team permissions
- Team/task management
- Dynamic/custom assignment based on value(s)/ types (metadata)
- Dynamic Sub-process invocation (Parent Child Relationship)
- Process admin server

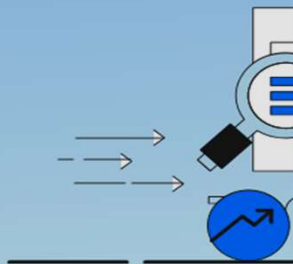


Explore the possibilities with
the combined power of case
and process management.



Welcome, Dave

Create and manage your projects and solutions from one convenient location.



Start building



Case solutions

Enable content-based activities and unify information, processes, and roles around a persisted case object model.

[View all](#) →

[Create](#) +



Process apps

Automate the services as well as the human-driven and system-driven activities involved in your business processes.

[View all](#) →

[Create](#) +

Explore the new, unified **Workflow Center** for workflow project development

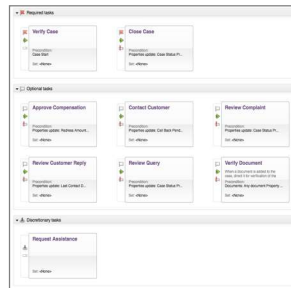
- Connect the capabilities of multiple market-leading offerings
- Access the latest assets and enhancements from every release for continued innovation
- Simplify your complex automation tasks to reduce cost and time to execute across all your workflows

Author

Develop and deploy unified case and process solutions.

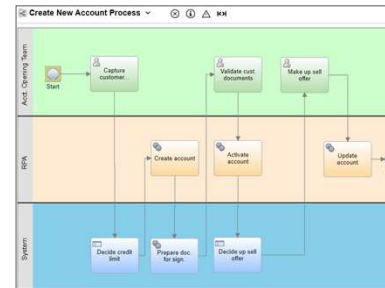
Case Builder (Low Code)

Add mandatory or optional activities including business processes and supply relevant context for case workers.



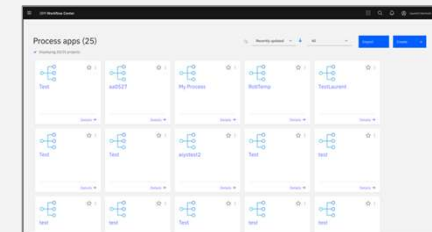
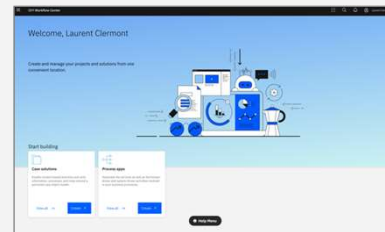
Process Designer (Low Code)

Model, implement, and inspect business processes to define employee activities and service tasks following BPMN standards.



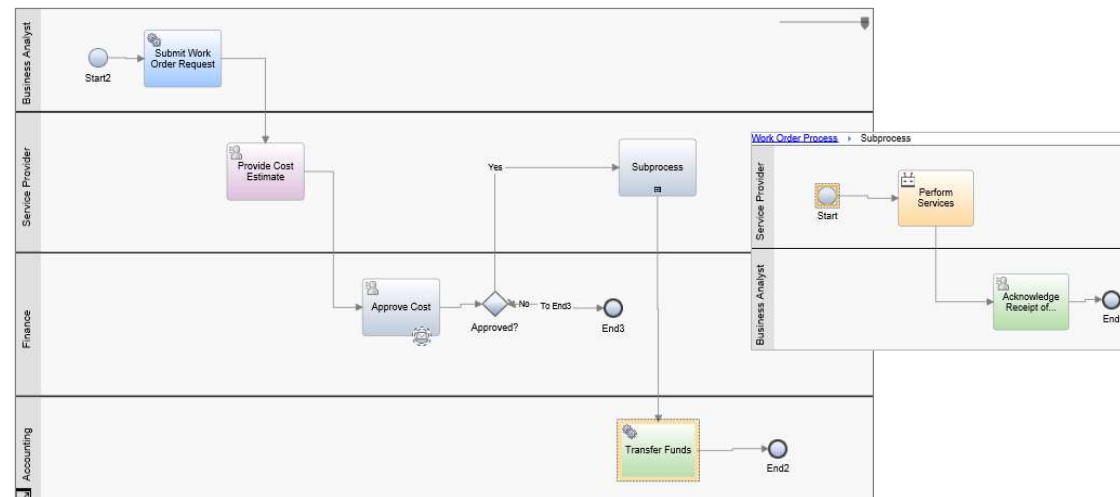
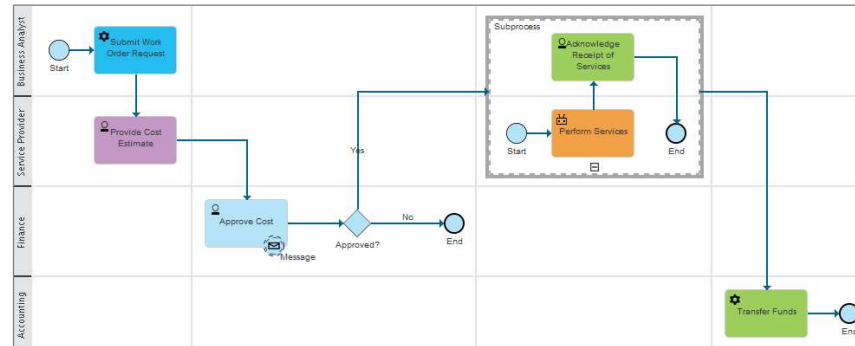
Workflow Center

All process and case artifacts can be found in a unified project environment.



Import processes from modeling tools

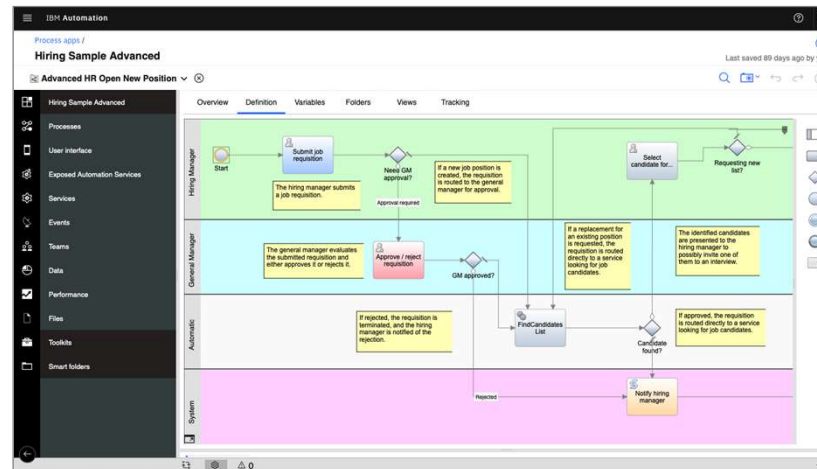
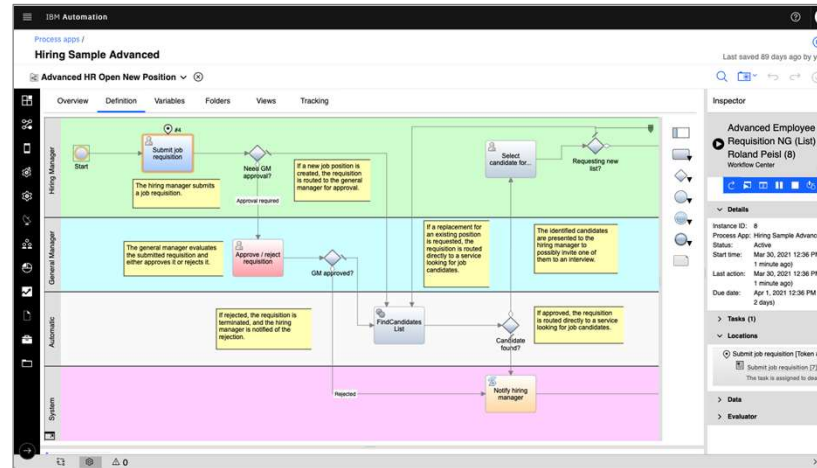
- Intuitively **model and document** processes collaboratively in Blueworks Live
- **Import** models in designer environment and **execute** immediately
- Build UIs and integration based on the **business blueprint**



IBM Business Automation Workflow: Web Process Designer

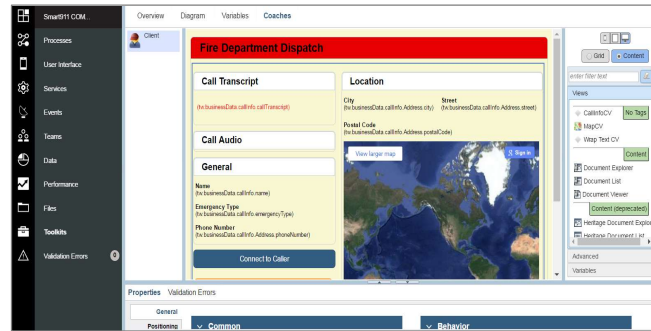
Create/update/ test processes

- Graphical design environment
- Supports open standards: BPMN
- Define and manage teams
- Play back process changes immediately
- Versioning and Lifecycle management



Configure process tasks

- No-code/Low-code implementation with graphical designer and point and click UI creation
- Open Standards (WSDL, JSON) and pre-built services to leverage data from existing systems
- Rule editors to codify and execute repeatable business decisions
- Orchestrate RPA bots to automate manual, repetitive tasks



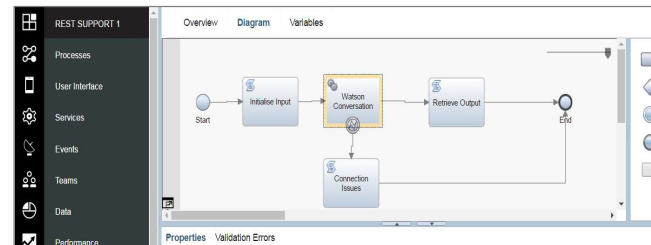
End user business interface design

	Spending	Status	Discount
1	100	silver	5%
2		silver	10%
3		silver	15%
4	100	gold	10%
5	200	gold	15%
6	300	gold	20%
7	100	diamond	15%
8	200	diamond	20%
9	300	diamond	25%
10			
11			

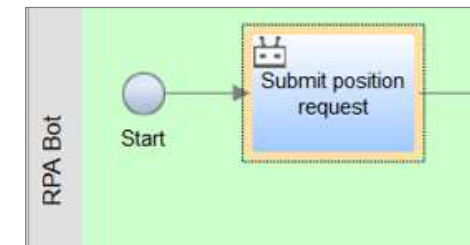
Errors
Line 1 overlaps with line(s) 2, 3, 4, 5 (4 more)

```
//status is "diamond" set discount to discount + 5|
```

Decision table and rule editor



Integration services Gateway to Microservices and SOA



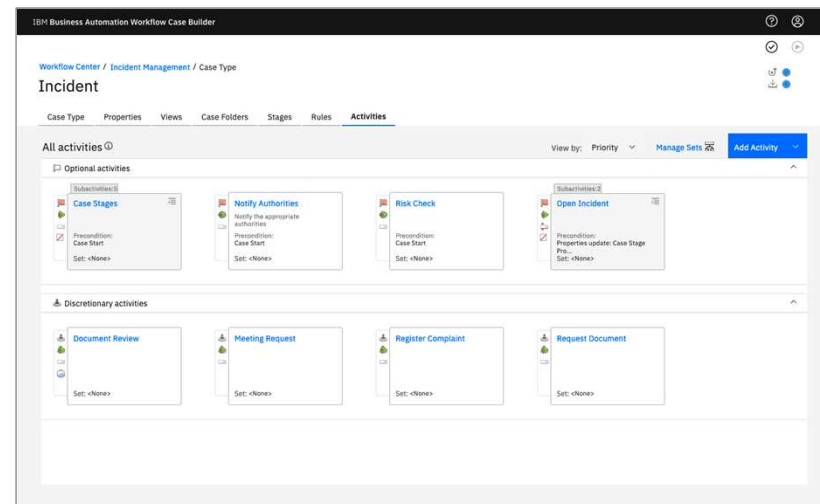
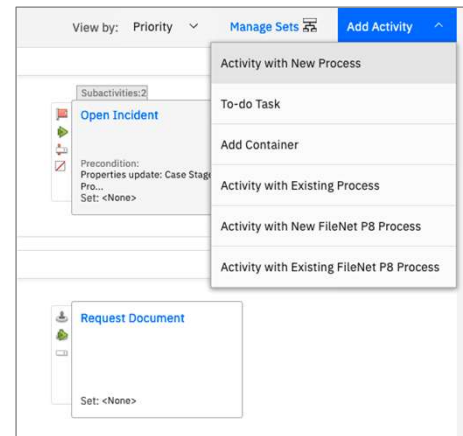
Tasks implemented as RPA bots

Use case management for knowledge-driven work

Define logic to **guide the knowledge workers** with activities that can be defined to

- Start automatically, manually by the user, or based on a pre-condition (e.g. document arrival, stage start, or property change).
- Be required, optional, repeatable, and inclusive or exclusive
- Be structured processes (integrated build experience)

The case builder **streamlines the build experience** for IT: design, deploy and test



Manage and store documents

Document Management provided by the ECM engine:

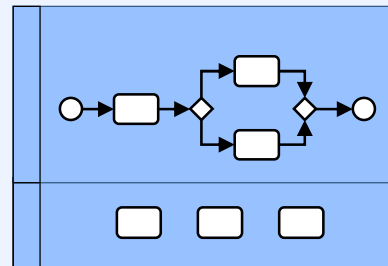
- Temporary document store for process instances
- Access to permanent document store used with Cases

Built-in connectivity via CMIS:

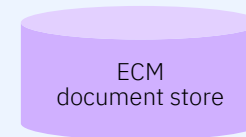
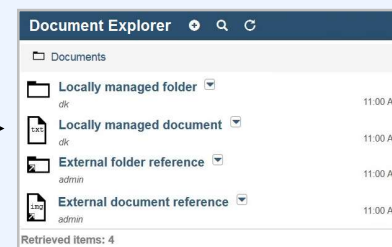
- For external document store integration

IBM Business Automation Workflow (BAW)

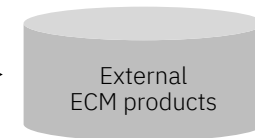
Processes



Single view of process documents



- Documents tied to Process lifetime
- References to SOR documents stored in ECM that can also be used in Cases

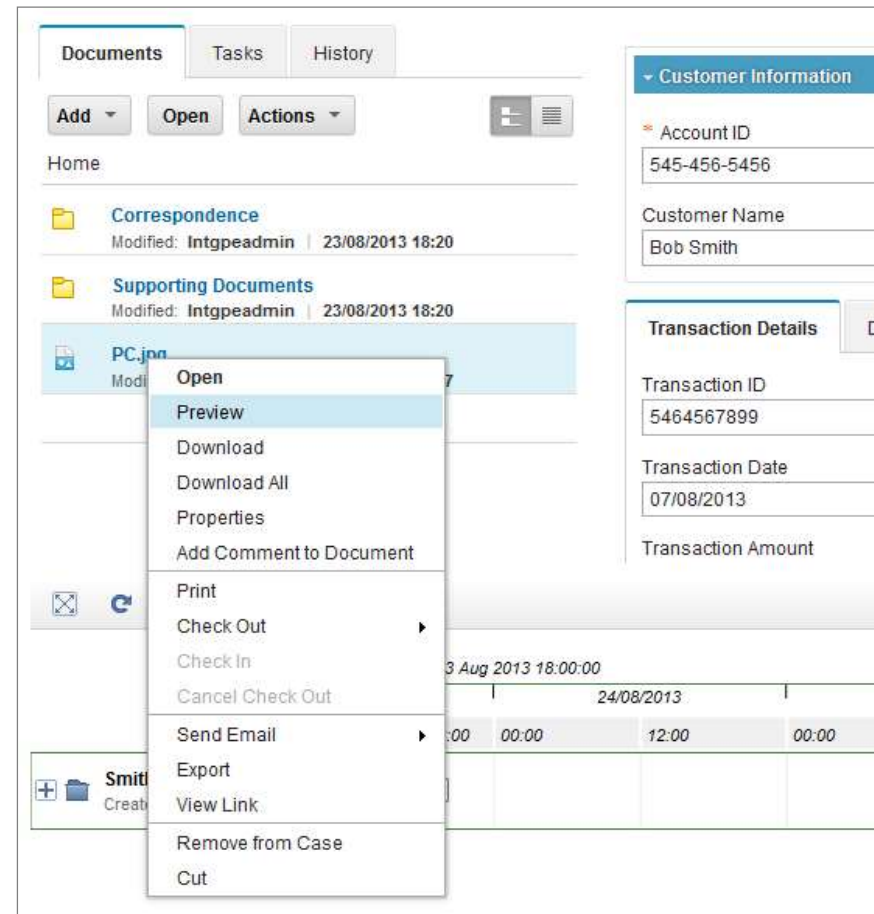


- All CMIS-compliant content stores

Use integrated content management

ECM content repository is available across the organization.

- Every case has its own folder for **storing** its documents
- Integrated **document viewer** with markup capabilities
- Full document management functionality document **versioning** and **metadata** properties
- **Centralized** content repository for all case artifacts: persistence
- Supports Content Navigator plug-ins to **extend** the standard capabilities



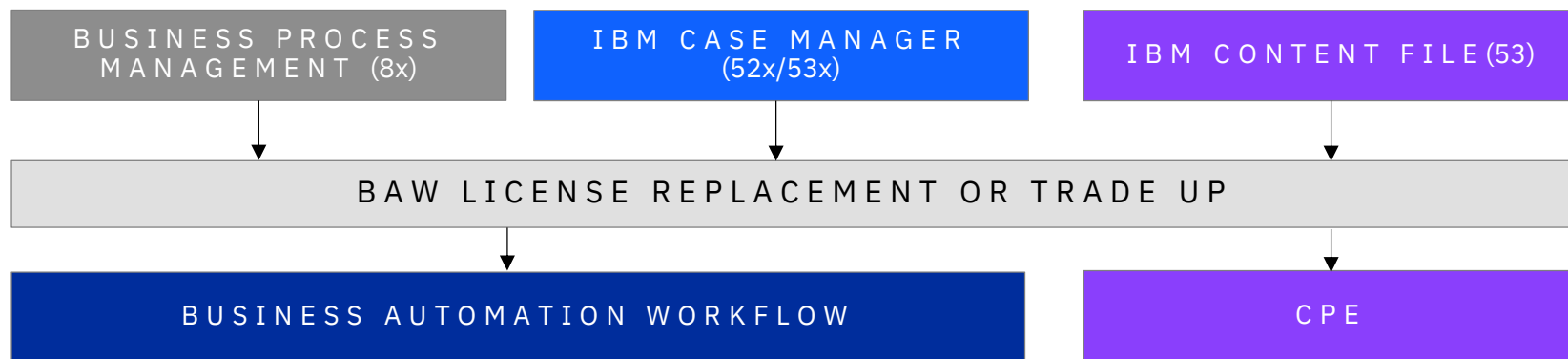
“The upgrade from IBM Case Manager to IBM Business Automation Workflow impressed us with its ease, despite our client’s numerous applications, customizations, and integrations, we were able to support their development upgrade [without rewriting any code](#) – delivering a powerful next step in the modernization of their applications.”

Jana Kruger, Senior Vice President, Intellective



Take the next step with IBM
Business Automation
Workflow.

Easily upgrade to IBM Business Automation Workflow while still supporting existing workflows



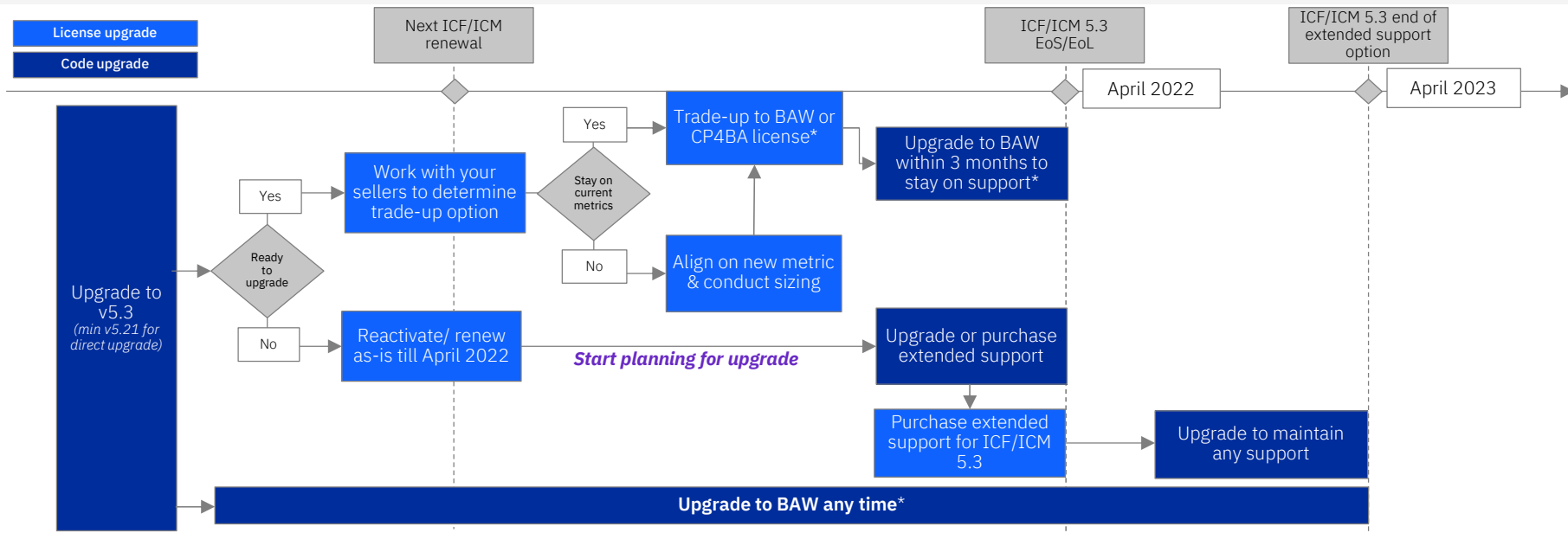
Clients can install the BAW server (which includes both BAW case and BAW process) and can continue to run their existing solutions (and data) as is on the BAW code line.

Clients can promote their existing case solutions to the BAW project format in order to take advantage of the new BAW case features including creating case activities that use BAW processes. **Existing case data does not require any migrations.**

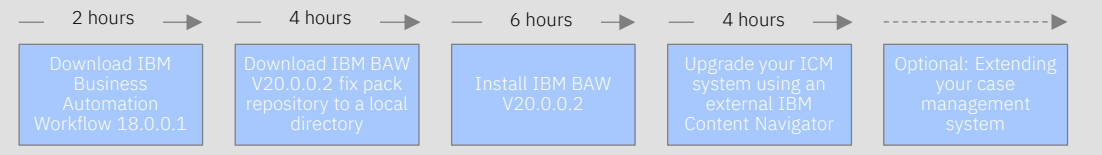
The FileNet process engine is part of the bundled CPE server. A BAW license gives you the rights to continue to use it and its associated authoring and monitoring tools with the latest bundled CPE version.

No installation of the BAW server is required until use of the BAW process capabilities is desired.

Customer journey to upgrade



Estimated upgrade time*



*Need [iFix](#) to align license tag until on BAW parts

*When dealing with "add-on parts" customers must also trade up the base license associated to it (most typically FileNet Content Manager) to BAW (or CP4BA)

*Waiver available if need more capacity for/during upgrade beyond 3 months (see IBM rep.)

*The above estimate is for a straight-forward BAW 20.0.0.2 installation and configuration, and doesn't include other components such as IHS, other load balancers, HADR, etc

Ready to upgrade?

Factors to consider



Licensing

- BAW VPC parts map to PVU and all user metrics (directly, no more UVU) so you can track/report same as before
- Analysis required for trade up on 1200+ UVUs
- Must upgrade within 3 months of trade-up to remain on full support
- Do not need to wait for license trade-up to start/perform code upgrade just need to apply iFix to update license types
- Waiver's available if need to exceed license count for/during upgrade



Install upgrade

- Custom widgets must be moved from the Navigation server to the BAW server (if it assumes it's location and the location of resources it might call, the code might require updates)
- Additional servers may be required
- New server needs WAS 8x even if you have already moved all your other servers to WAS 9x
- If you're on the latest versions (BPM 8x and beyond, ICM 5.2.1.7 and beyond) then you can complete an in-place upgrade



Solution Update / Promotion

- Promote a case solution to convert it from the 53x version to the new Workflow project
- Promotion enables you to take advantage of all the new BAW features (prior to promotion it will open in the same classic case builder view)
- Eliminate deprecated systems or reach out to your IBM rep to discuss options (Ex. E-forms)

Accelerate your upgrade by preparing the following information:

- Current version numbers
- License type
- Any custom applications
- Any deprecated capabilities still in use

Your simplified guide to upgrade



Plan

[No-cost workshop available led by IBM Services](#)

Develop an upgrade roadmap by analyzing current processes. Our automation experts will review your BPM or Case environments. Experts will also conduct an analysis of your as-is Case and BPM artifacts to build an actionable plan and schedule your upgrade.

Workshop goals:

- Assess efficiency and performance of current Case or BPM applications
- Identify additional automation synergies
- Develop an estimated budget and plan for upgrading your existing platform using QuickWin

Thank you

First Lastname

Job Title

—

firstlastname@us.ibm.com

+1-555-666-5555

ibm.com

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Appendix

Jump to...

New Features

Roadmap

Administrator

Licensing

BAI

New Features

BAW ON CONTAINERS

- Use SQL integration capabilities in your process applications running in Business Automation Workflow on containers
- Install Enterprise pattern reduces complexity allows to add other ICP4A patterns (i.e., Decisions)
- Use Oracle or PostgreSQL databases
- Migrate IBM Case Manager V5.3.3 to IBM Business Automation Workflow on containers
- Author and run workflows in IBM Cloud Pak for Automation 20.0.3
- Enable Intelligent Task Periodization (ML feature)

PROCESS

- Expose strongly typed REST automation services and enable Automation Services
- Use new case APIs to create packages, file documents, and obtain the current stage
- Run instances on a remote IBM Workflow Server
- Assign process tasks to the same user who started the process
- Automatically reconnect diagram nodes when the nodes are deleted

CASE

- Use new case page layouts built using client-side human services and case-specific views
- Leverage the new Case toolkit that provides default client-side human services and UI views for the new case pages
- Use IBM Business Automation Insights to view case dashboards that use data from FileNet® P8 processes

PORTALS

- Manage all your work in new Workplace portal available in BAW on Containers
- Team and Process Performance dashboards available in BAW on Containers

Summary of BAW 20.0.0.2 Key New Features

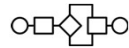
Roadmap

– Confidential NDA Required

Taking Process Automation to the Next Level

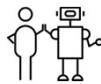
Based on **AI**, create **digital twins** of your **business processes** to:

- Maximize performance
- Increase agility, absorb change
- Reduce time-to-market for new products
- Improve Employee & Customer Experience
- Consistent & Predictable outcomes
- Eliminate non-value add costs
- Transparency and Auditability



Business Self Service

Create dynamic, AI directed, code-free workflows that enable automation of critical business processes



Hybrid Workforce Collaboration

Orchestrate work between human and digital workers within a workflow to reduce cost and improve efficiency



AI Work Management

Increase Team Throughput by optimized task prioritization using predictive analysis to score each workers tasks by skill and performance



Natural Language Interaction

Use of Natural language to allow users to interact and investigate the performance of their workflows and business outcomes



ML Decision Support

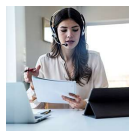
Provide decision recommendations by analyzing data from interdependent relationships and historical conclusions



Operational Intelligence

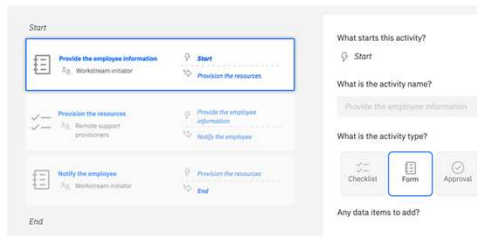
No-Code Business dashboards for KPI management, Predictions, Suggestions, and Workforce Performance, aligned to your business goals

Self Service with Multi-Persona Workflow Authoring available as part of Cloud Pak for Business Automation

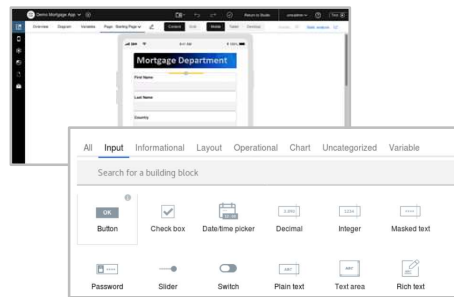


Business User

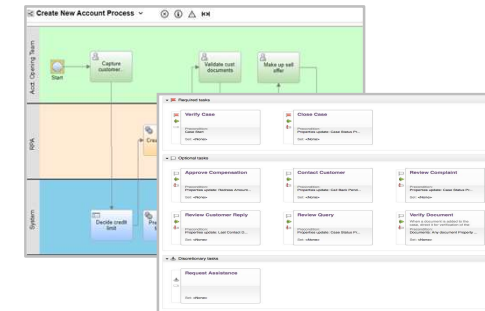
Request work from home resources (Read-only) ¹
 To make changes to the workflow definition you're viewing, click Modify to put the definition in draft mode, then make the required changes.
 Team managers



Business Expert



Workflow Developer



No-Code Situational Workflow

- Leverage prebuilt Activity types
- Arrange activities into a sequence
- Configure forms, checklists, content and assignment
- Available as part of CP4BA

No-Code / Low-Code Business Designer

- Intuitive, simple, but comprehensive business authoring experience
- Choose from a set of services & artifacts in the automation catalog
- In collaboration with IT
- Upcoming with Tech Preview in June 2021 (GA December 2021)

Enterprise Workflow Creation

- Powerful authoring of all process and case types
- Ability to create, publish, and consume reusable automation services
- Orchestrate Human and Digital Workers (RPA Bots)
- Available as part of Studio in CP4BA

Administrator

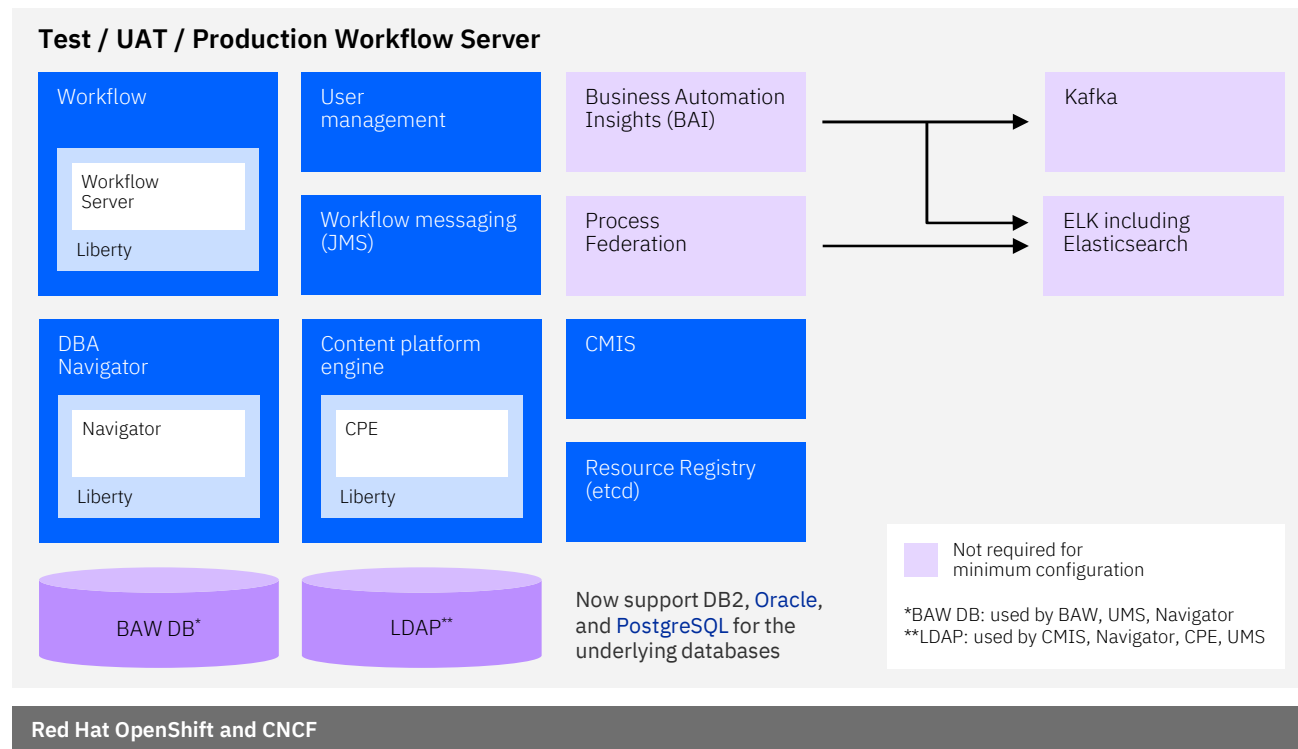
BAW on Containers – Available since BAW 20.0.0.1

All **BAW** and **Cloud Pak for Business Automation** customers with current entitlements have access to the containerized runtime

Container Federation by Default

- Task federation (PFS)
- Single UI tier (Navigator)
- Common content services (CPE)
- Global Teams (UMS)
- Aggregated monitoring/KPIs (BAI)
- Federated BPM Portal
- All application tier federated by default (BAW)

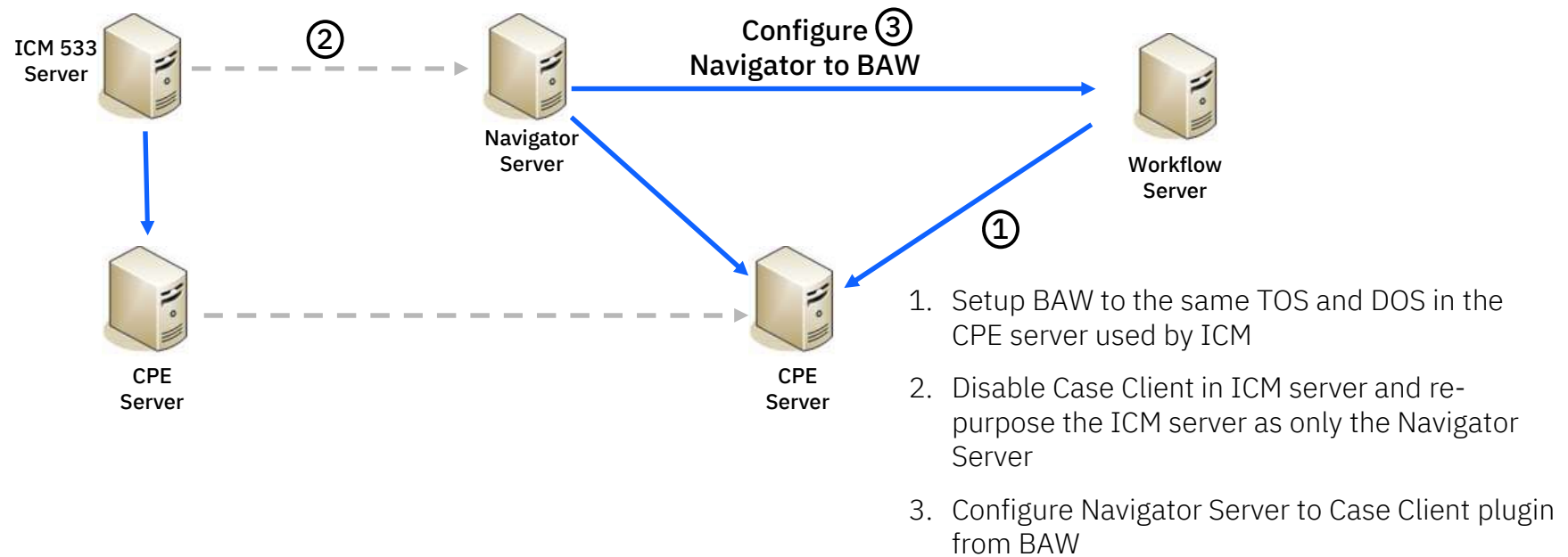
Each tier is independently scalable using auto-scaling to **optimize resources**



ICM to BAW Infrastructure: Upgrade and Augment

Case Manager (ICM) upgrade to BAW:

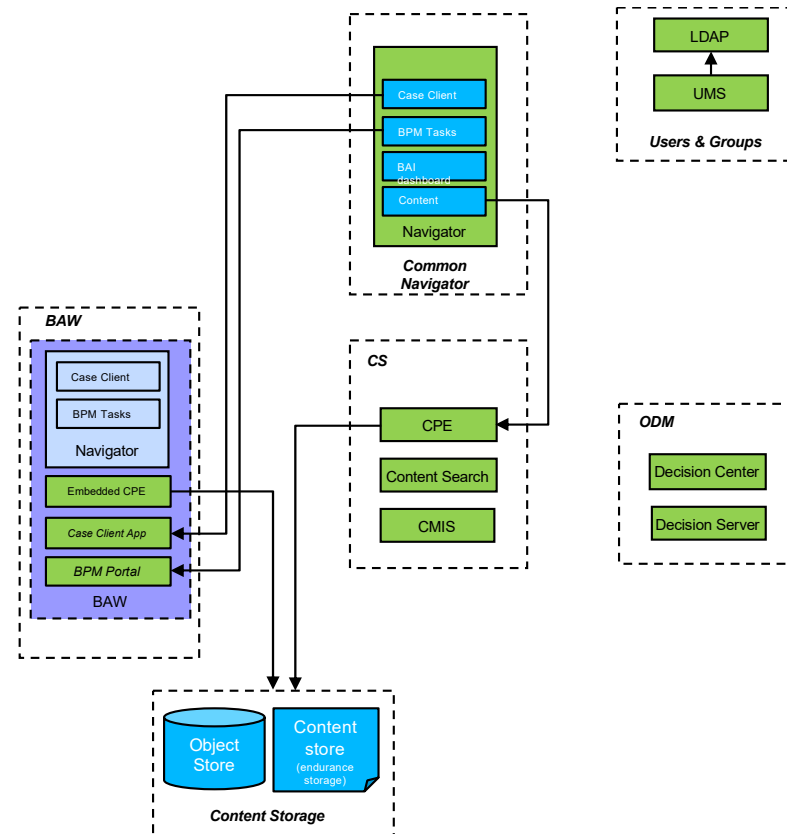
https://www.ibm.com/support/knowledgecenter/SS8JB4_20.x/com.ibm.wbpm.workflow.main.doc/topics/cld_upgrade.html



Business Automation Workflow 20.0.0.2

- Upgrade destination for IBM Case Manager 5.3.3 clients and their existing solutions

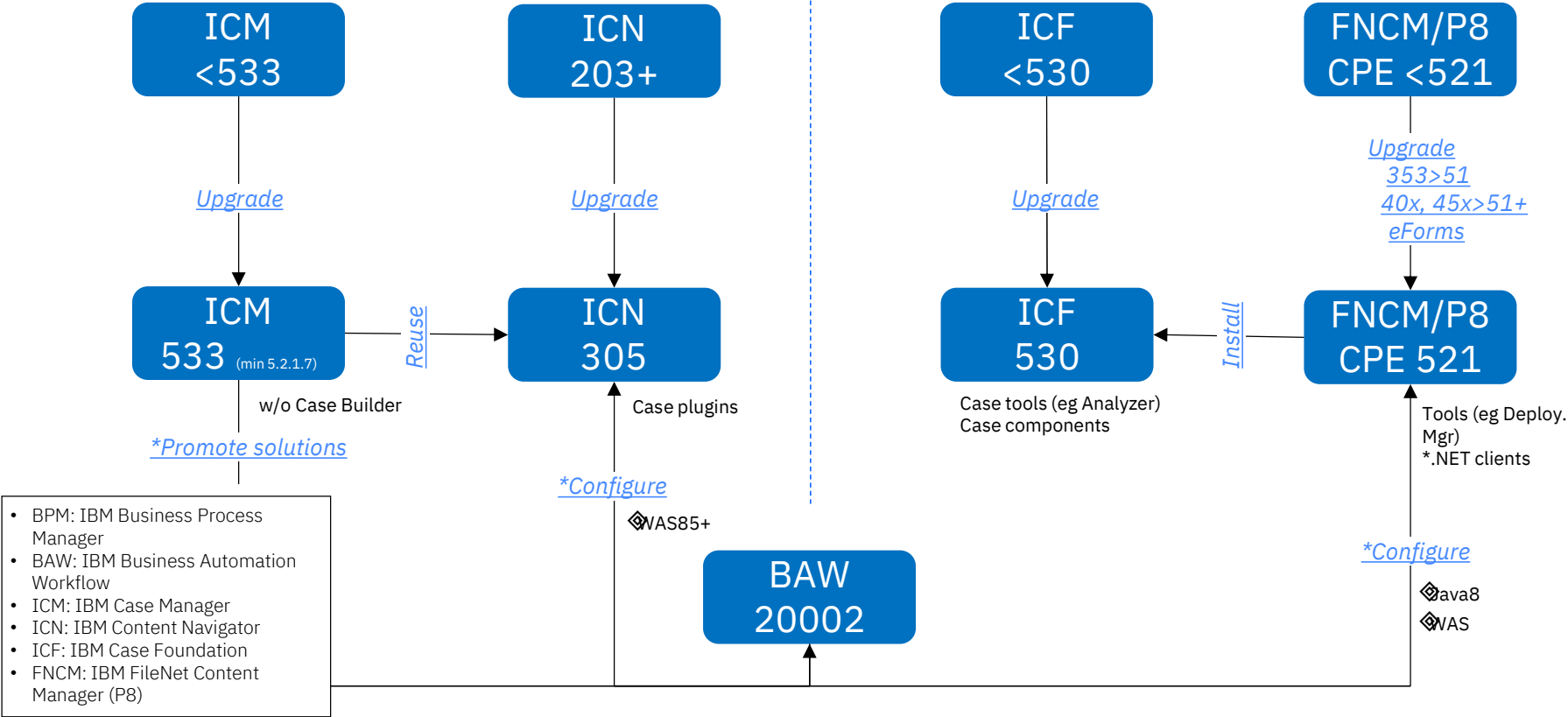
- Augment existing ICM/ICF/ECM environment
- Retains all existing Navigator configuration
- BAW components now referenced from Nav
- No change to existing case solution
- Continue working just as before
- Use new process integration when ready



Process & Case upgrades

Case (Manager)

Case (Foundation)



IT Value of Workflow Containers

Cloud Pak for Automation

- **Unified platform experience**
- **Better component reuse**
- **New capabilities:** Studio, App Builder, Workstream Services, etc.

Red Hat OpenShift

- **Application Lifecycle Services based on Operators:** Installation services, packaging, servicing and updates
- **Common diagnostic services:** Logging, monitoring, and metering

Kubernetes

- **Commodity infrastructure skills**
 - Standardized load balancing
 - More scalable: policy-based auto-scaling
 - Innate High Availability
 - Continuous Availability: no down-time for upgrades for minor updates
- Better application isolation: Faster and cheaper to create an additional application domain
- Improved application portability
- Topology Best Practice out-of-the-box (Operators)

Docker

- **Standardized provisioning** (installation) - Much faster environment creation
- **Reduced support costs** - Docker containers are provided by IBM and considered "read only" black boxes
- **Simpler updates** - Applying a cumulative fix or just an iFix is a new Docker image.
- **More flexible architectures** - A mix of different runtimes such as Jakarta (Liberty), JavaScript (Node.JS), or even C/C++ (MQ).
- **Faster delivery of product capabilities** - a benefit of microservices

WebSphere Liberty

- **Smaller package:** 800 MB for Liberty container vs. multiple GB for traditional
- **Faster start up time:** 10s of seconds vs. several minutes
- **Simpler configuration:** 100s down to dozens of configuration parameters

IBM Cloud Pak for Automation



Container Federation by Default

All tiers are for all application domains

- Task federation (PFS)
- Single UI tier (Navigator)
- Common content services (CPE)
- Teams (UMS)
- Aggregated monitoring/KPIs (BAI)
- Federated BPM Portal
- All application tier federated by default (BAW)

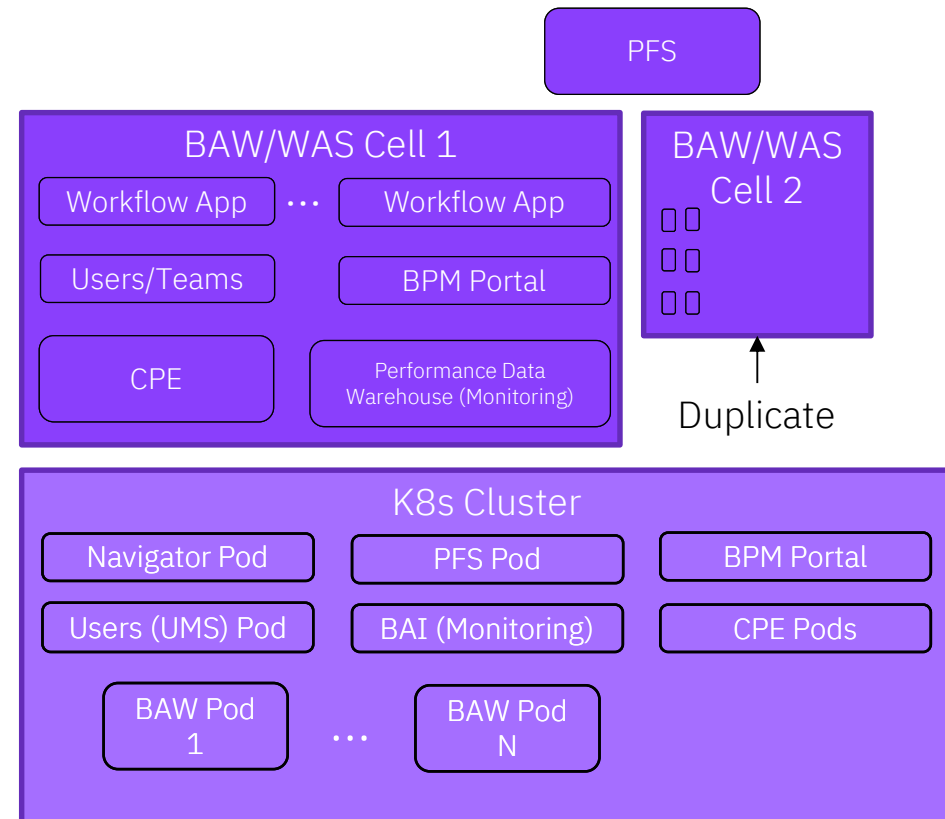
Each tier is independently scalable using auto-scaling to [optimize resources](#)

[Greatly reduces cost](#) of application isolation – only need to have another application tier (BAW)

- Avoid resource contention

[Simplify migration](#) from BAW traditional

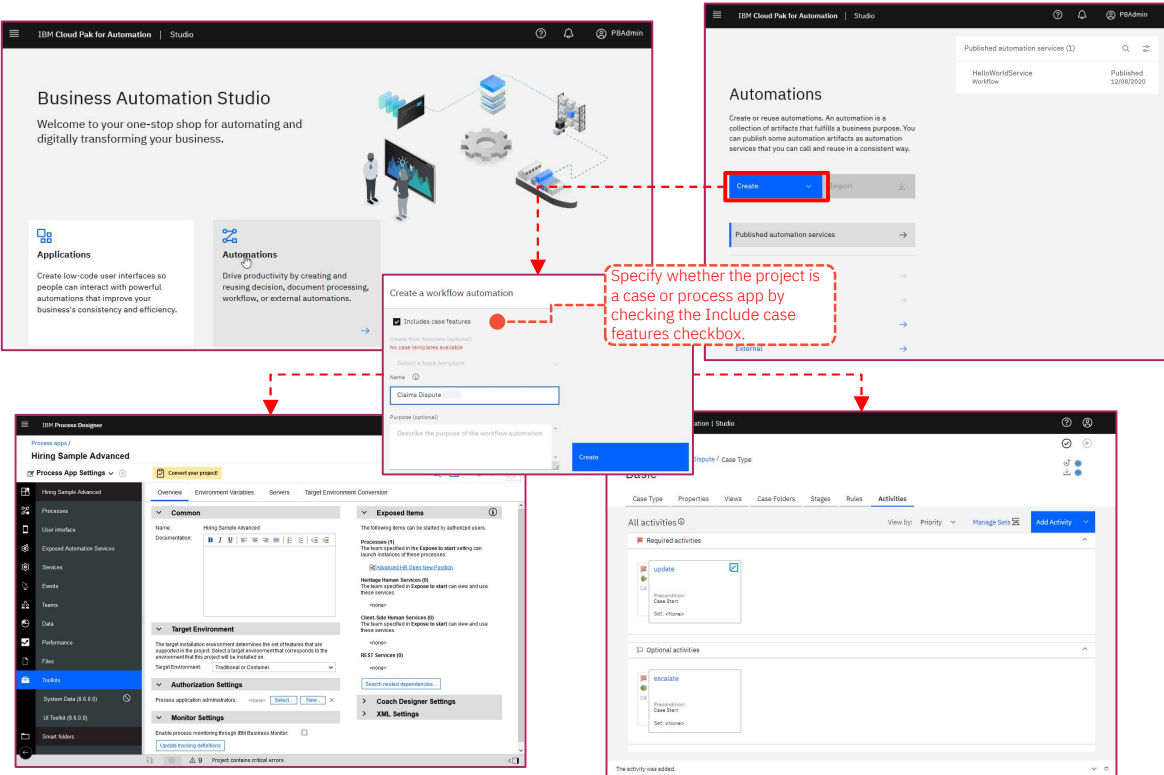
- Start new work on the container environment, finish existing work on traditional environment



New BAW capabilities for Case & Process

Cases and process projects managed within one unified workflow Center:

- Manages all the process and case artifacts in a unified project
- Opens appropriate editor based on the project type
- Case Builder
- Web Process Developer

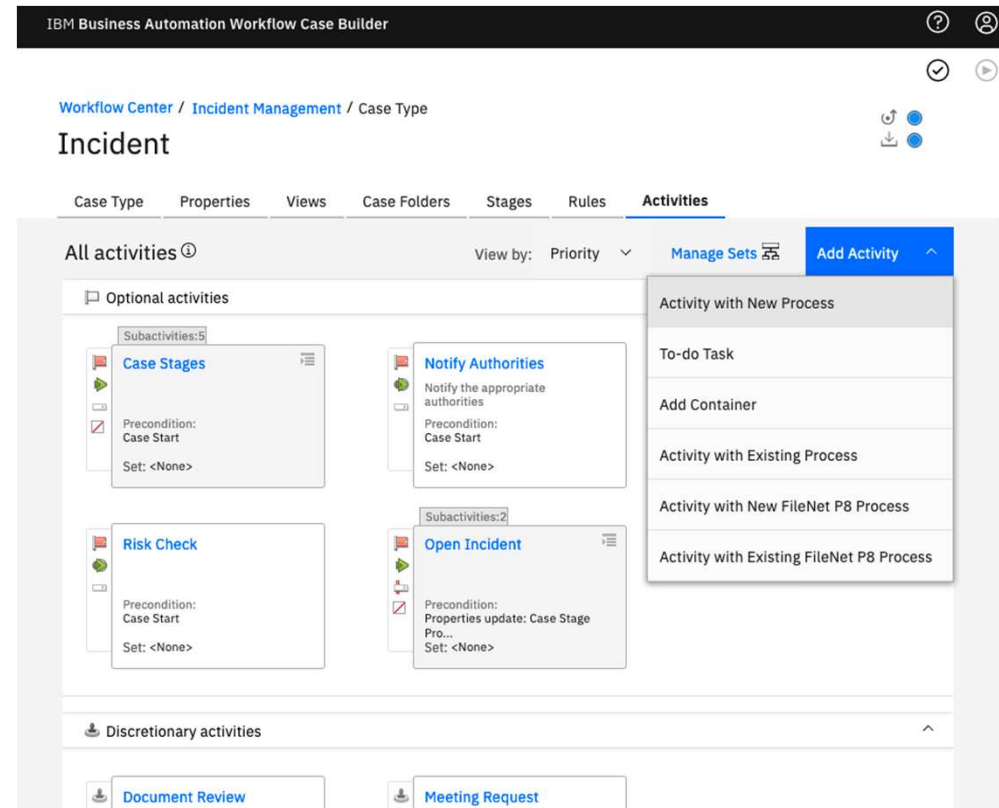


Case Activities

Case Activities are typically used to orchestrate the launch of a process that performs some set of actions in support of the case

According to the OMG's BPMN and CMMN specifications:

- An activity is a generic term for work that an organization performs. It can be atomic or compound.
- A task represents a single unit of work that is not or cannot be broken down to a further level of business process detail.



Case Activity Orchestration

Each case instance orchestrates the activities defined for them

Case activities can

- Start automatically
- Manually by the user
- Based on a pre-condition
 - Document arrival in the case
 - Case stage start
 - Case property change

For process backed activities, new menu actions to access the process instance

- and from there the current task

The screenshot displays the IBM Business Automation Workflow Case Client interface. At the top, the header reads 'IBM Business Automation Workflow Case Client'. Below this, a navigation bar shows 'Cases' with a dropdown arrow. The main content area is titled 'Case Bob Smith' and includes a 'Manage Dispute Item' link. Action buttons for 'Add Comment to Case', 'Add Activity', and 'Split Case' are visible. The 'Transaction Details' section lists: Transaction ID (23423423), Transaction Date (2019-05-27 at 12:00 AM), Transaction Amount (2,444), and Transaction Description (Camera). The 'Activities' tab is active, showing a list of activities: 'New Dispute Setup' (started 2019-06-11, 1:49 PM) and 'Review Dispute Item' (started 2019-06-11, 1:49 PM). A 'View Instance' button is overlaid on the 'New Dispute Setup' activity, with a 'View Process Inspector' button below it. The interface also shows 'Optional (10)' and an 'Add Document' button.

Natively managed activity processes

Create and define new case activities using the new process design capabilities

These activity processes are stored and managed as part of the case project.

The screenshot displays the IBM Business Automation Workflow Case Builder interface. At the top, the breadcrumb navigation shows 'Workflow Center / Incident Management / Case Type'. The main title is 'Incident'. Below this, there are tabs for 'Case Type', 'Properties', 'Views', 'Case Folders', 'Stages', 'Rules', and 'Activities', with 'Activities' being the active tab. The interface is divided into several sections:

- Optional activities:** Contains a 'Case Stages' activity with a precondition of 'Case Start' and a set of '<None>'. Below it is a 'Discretionary activities' section with a 'Document Review' activity, also with a set of '<None>'. A red arrow points from this section towards the main workflow diagram.
- Main Workflow Diagram:** A flowchart showing the process flow. It starts with a 'Start' event, followed by a 'Submit position request' activity. A decision diamond asks 'New position?'. If 'No approval needed', it proceeds to 'HR'. If 'Yes - GM approval required', it goes to a 'Review new position request' activity, followed by another decision diamond 'GM approved?'. If 'Approved', it proceeds to 'HR'. If 'Rejected', it goes to 'Find position candidates'. A 'Missed due date' event also leads to 'Find position candidates'. The diagram is color-coded by lane: 'Hiring Manager' (green), 'General Manager' (blue), and 'Human Resources' (grey).
- Properties Panel:** Located at the bottom, it shows details for the 'Common' activity. Fields include 'Name: Start', 'ID: bptd:431b0753:c3384262:3d545720:141a2f23448-760e', and 'Documentation: The Standard HR Open New Position process begins.'

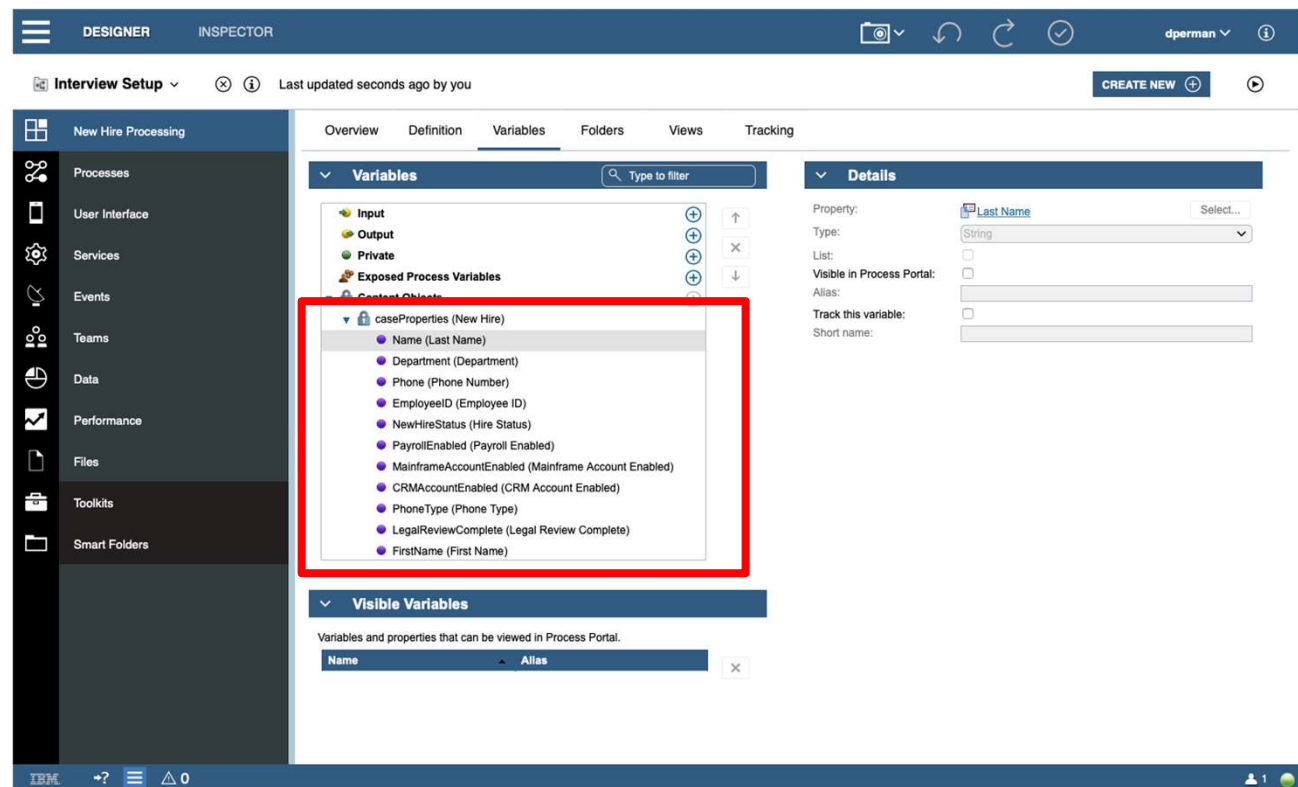
At the bottom left of the screenshot, the word 'CONFIDE' is partially visible.

Full awareness of parent cases from processes

New process variable type of “Content Object” that is synchronized with the parent case folder object

At design time, use like any other process variable

At runtime, directly read/write case property data

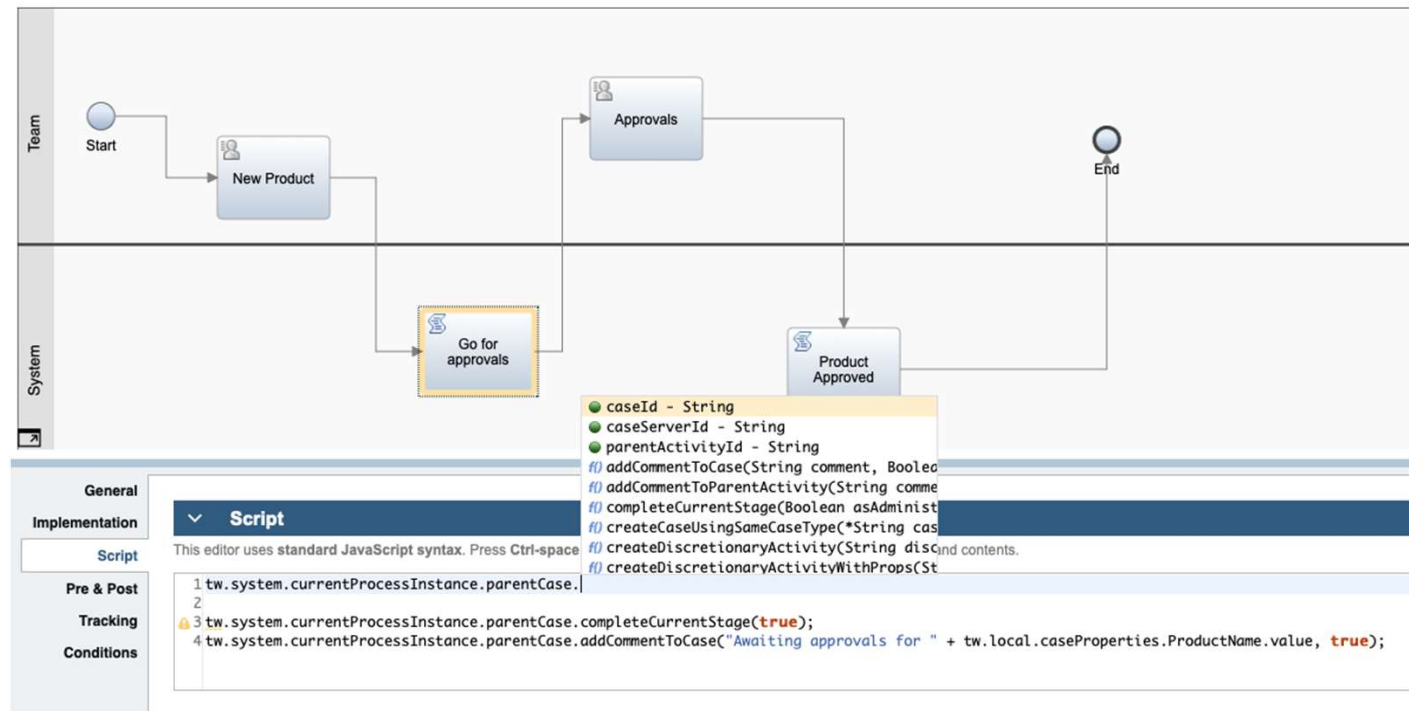


Full awareness of parent cases from processes

Processes used for case activities have access its parent case and activity IDs

New case operations available via scripting methods

Full set ECM Content operations allow processes to interact with content

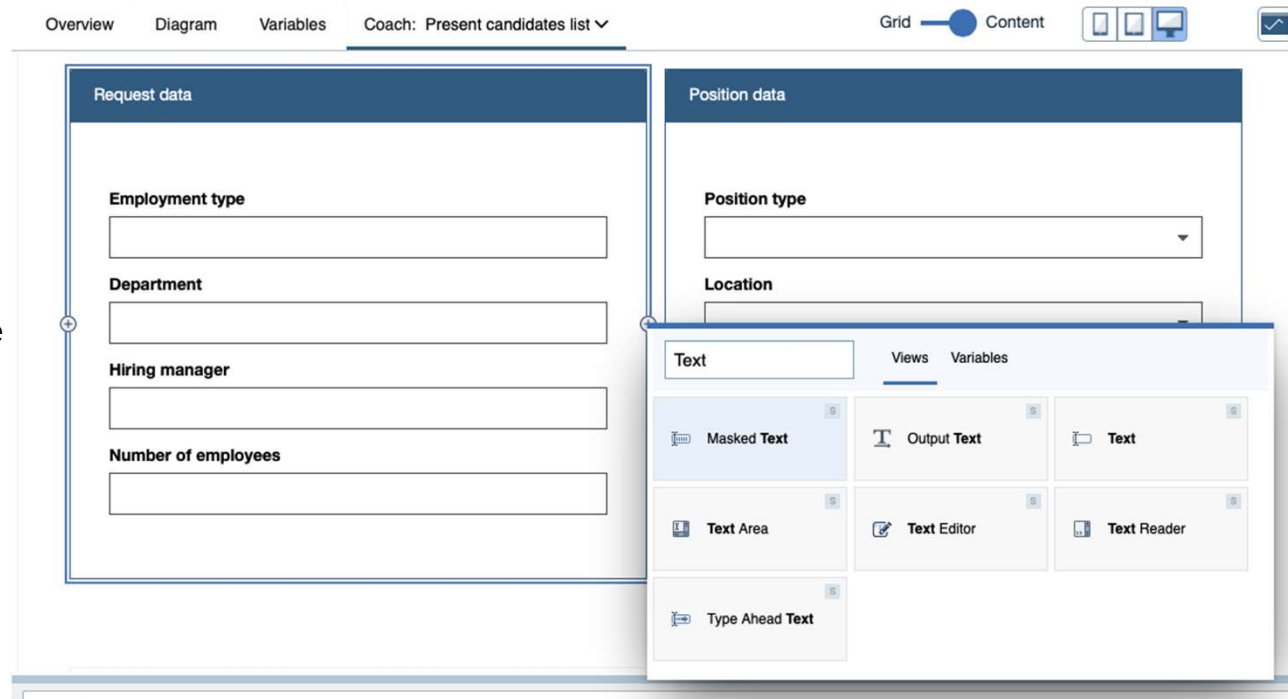


Authoring task UI with new streamlined editor

The coach and view authoring experience now benefits from a streamlined, space-efficient navigation in the client-side human service and heritage human service editors.

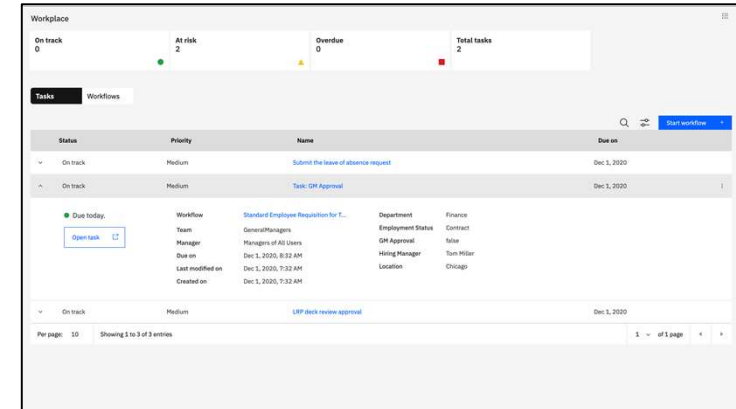
Also, a new intuitive palette experience is provided in the layout for the view, client-side human service, and heritage human service editors.

Access [a new case toolkit for dragging and dropping related widgets](#) (case info, documents, comments, activity history, etc.) in the [Coach editor](#).



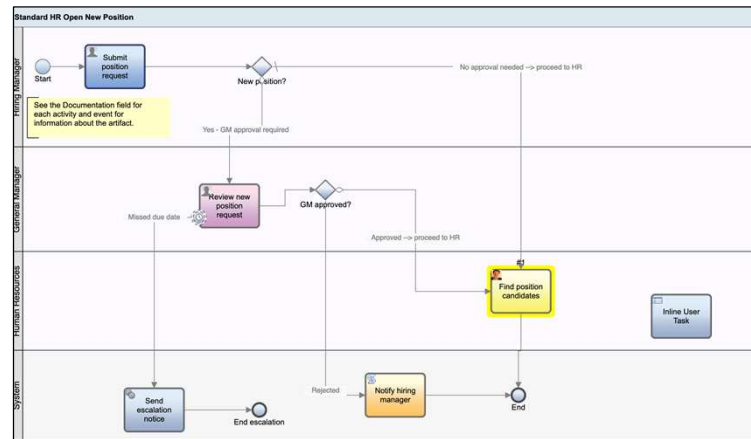
Help users manage work

- Prioritized list of tasks to know what to do next
- Ability to search/order/filter to find work items
- Email notification when a response is needed
- Automatic load balancing to optimize outcomes
- Collaborate with IT for continuous improvement
- Custom portals can be used
- Desktop and mobile ready



Help users **complete** work

- Visual summary of workflow to understand status
- All relevant data in one screen to take action
- Secured collaboration with team and experts
- Flexibility to **configure** and **initiate** ad-hoc work



Details Experts Stream

Experienced Users 4

- bingyan liang**
Similar Tasks Completed: 4
Mention
- Ramses Zarate**
Similar Tasks Completed: 2
Mention
- Bob Spory**
Similar Tasks Completed: 1
Mention
- Hugo Chia**
Similar Tasks Completed: 1
Mention

Details Experts Stream

Post

Laurent Clermont
Hello Admin , can you help?
Aug 7, 2020, 7:00:37 PM

Laurent Clermont
Task: Find job candidates task was claimed (currently assigned to Laurent Clermont)
Aug 7, 2020, 6:55:53 PM

Task: Find job candidates task was claimed (currently assigned to Laurent Clermont)
Jun 9, 2020, 12:35:50 PM

Workplace / Standard Employee Requisition for Tom Miller (Standard HR Open New Position)

Standard HR Open New Position | Due on Dec 1, 2020, 11:32 AM

Overview Tasks Activities Documents

Workflow progress

Created Dec 1, 2020, 7:32 AM Due Dec 1, 2020, 11:32 AM

Due today.

Summary

Status	On track	Created on	Dec 1, 2020, 7:32 AM
Modified on	Dec 1, 2020, 7:32 AM	Due on	Dec 1, 2020, 11:32 AM
Workflow type	Standard HR Open New Position		
Department	Finance	Employment Status	Contract
GM Approval	false	Hiring Manager	Tom Miller
Location	Chicago		

Comments Add comment

tw_admin
Look good, thanks!
Dec 1, 2020, 7:34 AM

Process tasks displayed in case in-baskets

When a process is used by a case activity, any tasks from that process that are available to the case worker will show up in their solution in-baskets.

These tasks will be seamlessly combined with any work from Case Manager's classic process engine

Visual indications for process tasks for:

- Overdue
- Priority
- Team assignment

The screenshot shows the IBM Business Automation Workflow interface. At the top, there is a dark blue header with the text 'IBM Business Automation Workflow'. Below this, there is a light blue navigation bar with a folder icon and the text 'Cases'. Underneath, there are two tabs: 'Cases' and 'Work', with 'Work' being the active tab. Below the tabs, there are two buttons: 'Manage Roles' and 'Add Case'. Further down, there are two sub-tabs: 'Human Resources (1)' and 'My Work (4)', with 'My Work (4)' being the active tab. Below the sub-tabs, there is a filter section with the text 'Filter: No filters applied' and a 'Reset' button. The main content area is a table with three columns: 'Step Name', 'Time Created', and 'Subject'. The table contains four rows of data.

Step Name	Time Created	Subject
Office Name Sign Request	11/13/2018, 11:33 AM	Office Assignment
🕒 ▶ Step: Employee ID Generated	4/18/2018, 10:38 AM	Request Employee ID: Tony Concode
🕒 ▶ Step: Employee ID Generated	8/29/2018, 10:28 AM	Request Employee ID: Heather Rose
🕒 ▶ Step: Employee ID Generated	9/11/2018, 2:44 PM	Request Employee ID: Don Masters

Process tasks displayed in case in-baskets

All of the expected actions are available for process tasks.

Some actions will display a settings dialog box.

Others, like Open and View Process Diagram will display in a new tab within the case client.

The screenshot displays the IBM Business Automation Workflow interface. At the top, there is a dark header with the text "IBM Business Automation Workflow". Below this, a navigation bar shows "Cases" with a dropdown arrow. Underneath, there are tabs for "Cases" and "Work", with "Work" being the active tab. A secondary navigation bar contains "Human Resources (1)" and "My Work (4)", with "My Work (4)" being the active tab. Below this, there is a filter section that says "Filter: No filters applied" with a "Reset" link. The main content area is a table with the following columns: "Step Name", "Time Created", and "Subject".

Step Name	Time Created	Subject
Office Name Sign Request	11/13/2018, 11:33 AM	Office Assignment
Step: Employee ID Generated	4/18/2018, 10:38 AM	Request Employee ID: Tory Concode
Step: Employee ID Generated	9/2018, 10:28 AM	Request Employee ID: Heather Rose
Step: Employee ID Generated	1/2018, 2:44 PM	Request Employee ID: Don Masters

A context menu is open over the first "Step: Employee ID Generated" row, listing the following actions: "Open Item", "Return Item", "Reassign Item", "Modify Task", "View Instance", "Modify Instance", "View Process Diagram", and "Audit History".

Process task completion

When a task belonging to an external process is opened, the coach is displayed in the usual case client page tabs.

This allows case solutions to leverage the powerful process handling capabilities included with BAW.

Task workers even have the option to easily navigate to the task's parent case if desired.

Multiple tasks and cases can be opened at the same time allowing quick comparisons or data copying.

The screenshot displays the IBM Business Automation Workflow (BAW) interface. At the top, the user is logged in as 'Intgpeadmin'. The main navigation bar shows 'Cases' and 'Work' tabs, with the current task 'Step: Employee ID Generated' selected. The task details include 'Request Employee ID: Tony Concode', 'CASE-ID', and a due date of '4/18/2018, 11:38 AM'. The 'Job requisition data' section is expanded, showing a table with two columns: 'Request data' and 'Position data'. The 'Request data' column includes fields for 'Employment type' (Contract), 'Department' (Finance), 'Hiring manager' (Tom Miller), and 'Number of employees required' (1). The 'Position data' column includes fields for 'Position type' (New), 'Location' (Chicago), 'Job title' (Head of Product Development), and 'Planned starting date' (9/8/2017). Below this, the 'Qualifications' section is visible, with tabs for 'Education', 'Skills', and 'Experience'. The 'Education' tab is selected, showing a checkbox for 'Bachelor of Architecture (B.Arch)'.

Request data	Position data
* Employment type Contract	* Position type New
* Department Finance	* Location Chicago
Hiring manager Tom Miller	Job title Head of Product Development
Number of employees required 1	* Planned starting date 9/8/2017


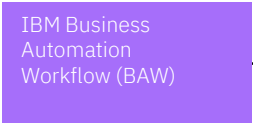
Qualifications

Education Skills Experience

Bachelor of Architecture (B.Arch)

Licensing

Customer journeys from BPM or Case – Internal Only

Starting point	Journey options	Form factor	Pricing metric options	Business drivers (6 options)	Benefits
<ol style="list-style-type: none"> 1. Business Process Manager 2. Case Manager 3. Case Foundation 4. Case add-ons with FileNet Content Manager/ Content Foundation 5. PVU or UVU, on-prem or Cloud 		IBM Cloud Pak for Automation on-prem	<ul style="list-style-type: none"> - PVU or authorized/ concurrent pricing through VPC part (Trade up) - PID: 5737-I23 	<ul style="list-style-type: none"> - Single, simple license - Use multiple DBA capabilities 	<ul style="list-style-type: none"> - Flexible license - Access to full platform capabilities
		IBM Cloud Pak for Automation on Containers	<ul style="list-style-type: none"> - VPC pricing (Trade up) - PID: 5737-I38 	<ul style="list-style-type: none"> - Single, simple license - Use multiple DBA capabilities - Containers/ Hybrid cloud strategy - AI strategy 	<ul style="list-style-type: none"> - Deploy anywhere - Flexible license - AI capabilities (BAI)
		IBM DBA on Cloud	<ul style="list-style-type: none"> - Flexpoint pricing - PID: 5737-J37 	<ul style="list-style-type: none"> - SaaS strategy - Use multiple DBA capabilities 	<ul style="list-style-type: none"> - Capex to Opex - IBM fully managed - Flexible license
		IBM BAW on-prem	<ul style="list-style-type: none"> - PVU or concurrent user pricing (Trade up) - PID: 5737-H41 	<ul style="list-style-type: none"> - Main interest is Process and/or Case - Keep current pricing and deployment models 	<ul style="list-style-type: none"> - New workflow capabilities - Existing assets remain under full support
		IBM BAW on Containers	<ul style="list-style-type: none"> - VPC licensing (Replacement) - PID: 5737-H41 	<ul style="list-style-type: none"> - Commodity skills - Reduced support costs - Simpler updates 	<ul style="list-style-type: none"> - Faster, more flexible deployment - AI capabilities
		IBM BAW on Cloud	<ul style="list-style-type: none"> - Concurrent user pricing - PID: 5737-I38 	<ul style="list-style-type: none"> - Main interest is Process / Case - SaaS strategy 	<ul style="list-style-type: none"> - CapEx to OpEx - IBM fully managed

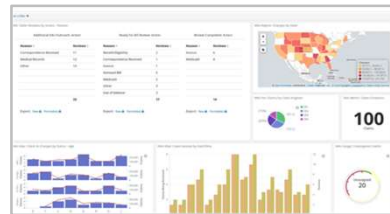
Business Automation Insights

Business Automation Insights (BAI)

Provides end-to-end visibility into your digital business operations, ensuring that activities and outputs meet an organization's goals in an effective, efficient, and repeatable manner

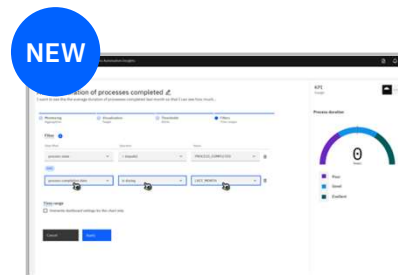
Real-time monitoring

- Workforce monitoring
- Process and case monitoring
- Decision monitoring
- Content monitoring



Business empowerment

- No code scorecard creation with KPIs, metrics, and Reports for business users
- AI assisted work prioritization for improved team performance



AI/ML enablement

- Capture end-to-end business data from DBA and third party applications
- Enable data scientists to build AI/ML solutions



Business Automation Insights (BAI)— How it works



Collect

Capture business and operational data from multiple instances of DBA components. In a manner that is **scalable, secure and non-intrusive.**



Prepare

Transform events and data to format for use for Dashboards and AI. **Correlate** cross DBA Pillar events. Handle stateful sources of events. Enable application of data **privacy.**



Visualize

Provide real-time visibility for business managers via **pre-defined or user configured dashboards.** This will provide full, real-time visibility into your operations.



Enable AI

Enables data scientists for AI/ML projects by infusing pre-curated set of operational data in a data lake. This enables making **recommendations or automatic adjustments** to workflows and decisions. This is not BAI capability. It is **enabled** by BAI.

Demo

BAI: Business Performance dashboard



Theo
HR Manager

The screenshot shows the IBM Business Automation Insights (BAI) Business Performance dashboard. The page title is "IBM Cloud Pak for Automation - Business Automation Insight" and the user is logged in as "admin". The main heading is "Dashboards (5)". There is a search bar and a "Create" button. The dashboard list contains five items:

Dashboard Name	Owner	Last Updated	Visibility
TVT_AL_copy public TVT test data Decisions Dashboard	Owner: baiAdmin	Last updated: 7/13/2020, 8:09:33 AM	Public
Decisions Dashboard Decisions Dashboard	Owner: BaiBuiltin	Last updated: 7/10/2020, 9:24:58 AM	Public
Workflow - Processes Workflow - Processes	Owner: BaiBuiltin	Last updated: 7/10/2020, 9:24:58 AM	Public
Workflow - Hiring Sample Workflow - Hiring Sample	Owner: BaiBuiltin	Last updated: 7/10/2020, 9:24:58 AM	Public
Workflow - Process Tasks Workflow - Process Tasks	Owner: BaiBuiltin	Last updated: 7/10/2020, 9:24:58 AM	Public

Demo

BAI: Creating a KPI



Theo
HR Manager

