

OpenText™ AppWorks for Dynamic Case Management

A simpler way to manage complex interactions between people, content, transactions, and workflows

The next wave of productivity gains will come from empowering digital workers to handle scenarios with dynamic and unpredictable interactions between people, processes, and content. The dynamic case management framework in OpenText AppWorks gives organizations a faster, simpler way to bring consistency and efficiency to these types of processes.

- Improve user productivity, process consistency, and case outcomes by **orchestrating interactions and workflows across multiple systems of record**
- Connect to relevant systems and content repositories to **provide context to each case**
- **Model cases the way subject matter experts naturally think about them**, especially since they often do not follow a single, predictable path
- Take advantage of a **low-code application framework** to go live significantly faster and iterate more frequently
- Seamlessly automate the routine parts of your processes with a single solution for case management and traditional BPM

Going digital – it's not just about routine business processes

Cases, which involve complex interactions between content, people, transactions, and business or regulatory policies, offer the next big opportunities to improve productivity and deliver amazing customer and employee experiences. Case-like processes often fall into the following categories:

- Incident management, for example, responding to a complaint or processing an insurance claim
- Service requests, for example, customer onboarding
- Process-through decision, for example, underwriting a loan

BENEFITS

- *Improve case outcomes and time to resolution: Connect caseworkers with the information, knowledge, and people they need to resolve cases*
- *Drive productivity gains: Reduce the effort needed to create, track, and manage cases*
- *Meet service level agreements with ease and predictability*
- *Increase customer and user satisfaction: Maintain flexibility to adapt processes to individual circumstances*

At the same time, competitive pressures and regulatory requirements are driving the need for efficiency and consistency in unstructured knowledge work.

Caseworkers need both context and flexibility

The less structured the process, the more the specific case's information determines the next best step. In most organizations, that information resides in multiple enterprise systems and content repositories.

In order to effectively support their caseworkers, organizations must:

- Bring all of the relevant information for each case together in one user experience
- Orchestrate interactions and workflows between the underlying systems behind the scenes, while maintaining integrity of the systems of record
- Allow workers to modify case progression and initiate ad hoc tasks based on the tasks at hand, unlike the structured processes in traditional business process management (BPM)

Moving beyond content management: decisions dictate the process

Cases typically tap into a core set of documents and other enterprise content. However case management differs from content management in that the case **lifecycle revolves around the process or set of decisions**, not around the document itself. Since a case may include different documents at different stages, it is critical that the case management solution seamlessly integrate with the appropriate content management capabilities—as well as bringing in structured data from enterprise systems.

High-code applications put the burden on developers

Traditionally, most dynamic case management applications have been created with custom development or high-code business process management solutions. However, developers may not have enough domain knowledge to translate process maps created by subject matter experts in the business. Likewise, business users may not adequately articulate their requirements to developers.

Either way, dynamic case management requirements can get “lost in translation” if business users and developers use different toolsets for their work. Traditionally, about half of the rework on a typical project can be attributed to missing or misunderstood requirements.¹

Domain-specific solutions sacrifice flexibility

Many critical business processes, particularly those that differentiate, are unique to you. While domain-specific applications work for standardized processes like regulatory compliance, they do so by limiting flexibility and applicability to different business needs. Not every case management application can meet its adoption goals under those constraints.

Orchestrate interactions and workflows across multiple systems of record

The case folder—which operates just like a physical folder—gives caseworkers quick access to all of the relevant information no matter where it resides. OpenText AppWorks orchestrates all of the information flows between systems of record, maintaining



information integrity and adding metadata to track progress as the case moves from stage to stage. Case metadata might include case ID, status information, or audit trails.

With OpenText AppWorks, the document or structured data stays in its system of record, while OpenText AppWorks manages the task work related to that document or data. Cases can also take advantage of OpenText AppWorks's process-driven master data management (MDM) capabilities for access to synchronized data from disparate sources across applications, departments, and geographies.

Gain more value from content management systems

OpenText AppWorks integrates with OpenText™ Content Suite Platform, enabling seamless processes for capturing information as part of a case, managing that information, and formatting it appropriately for outgoing communications. For example, automated content capture might initiate the case and its closure might trigger the system to format outbound communications to a customer. Content and actions sit side by side in one user experience, just how people actually work.

Give power to the people who know the process

OpenText AppWorks employs a low-code application development approach that supports “information-driven design.” Business owners who are experts on the process can think about information first, followed by how the process needs to flow.

With OpenText AppWorks, business owners can build the process models while developers focus on integration. They can even configure integrations via drag-and-drop once developers build the appropriate web services API calls. The OpenText process engine can trigger micro-transactions, from displaying information for an account name to ordering a credit check, via its REST and web services APIs.

¹ <http://www.techrepublic.com/article/the-requirements-translation-challenge-can-you-meet-it/>

Enabling the next generation of digital workers involves:

- Dynamic and unpredictable interactions
- Ad-hoc scenarios
- Guidance, not control
- Knowledge, not process, driving case resolution
- Access to multiple systems of record, both database-based systems and unstructured content repositories

Go live quicker and iterate faster

Entity modeling offers an application development platform that:

- Speeds the time to market for new applications
- Simplifies effort required to modify and update processes
- Allows for experimentation.
- Contains fewer points of failure
- Offers simpler change control for new releases.

Because entity modeling makes it much easier to add functionality over time, you don't have to anticipate every possible requirement in your first implementation.

Seamlessly automate routine processes

With dynamic case management, more structured processes often precede a case or follow its closure. Since OpenText AppWorks supports both traditional BPM and dynamic case management, you can optimize your entire process, not just the case management component.

Case metrics and statistics

OpenText AppWorks also offers process intelligence, so that business owners can effectively monitor processes and manage exceptions.

Dynamic case management solution details:

OpenText AppWorks offers:

- An **information-centric paradigm** for modeling cases
- Low-code application environment, with a framework for providing common elements such as lists, dashboards, navigation, or forms along with a compositional approach to specify functionality
- A **Connectivity layer** that gives subject matter experts drag-and-drop access to information in database-based systems and content repositories that serve as “systems of record”
- **Integration with OpenText Content Suite** – seamlessly capture information as part of a case, manage that information, and format it appropriately for outgoing communications
- **Runtime evolution:** Enable business users to augment the case with tasks, checklists and SLAs ad hoc as they are handling it, enabling an individual case to evolve beyond the original structure specified for its case type.
- **Data-driven decision support:** Use rules to help caseworkers come up with next best action. The system guides them on what action makes the most sense based on an analysis of historic events within similar cases.
- **Case statistics and metrics** for out-of-the-box process monitoring, reporting on process health, tracking case throughput and statuses, and managing open issues
- Support for **web services**
- **Governance and versioning:** Tie projects to source control systems, control deployments, and report on what has changed
- Built around the **Case Management Model and Notation (CMMN)** standard