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Processes, Cases, Projects, and Plans: Avoiding Common Automation Pitfalls

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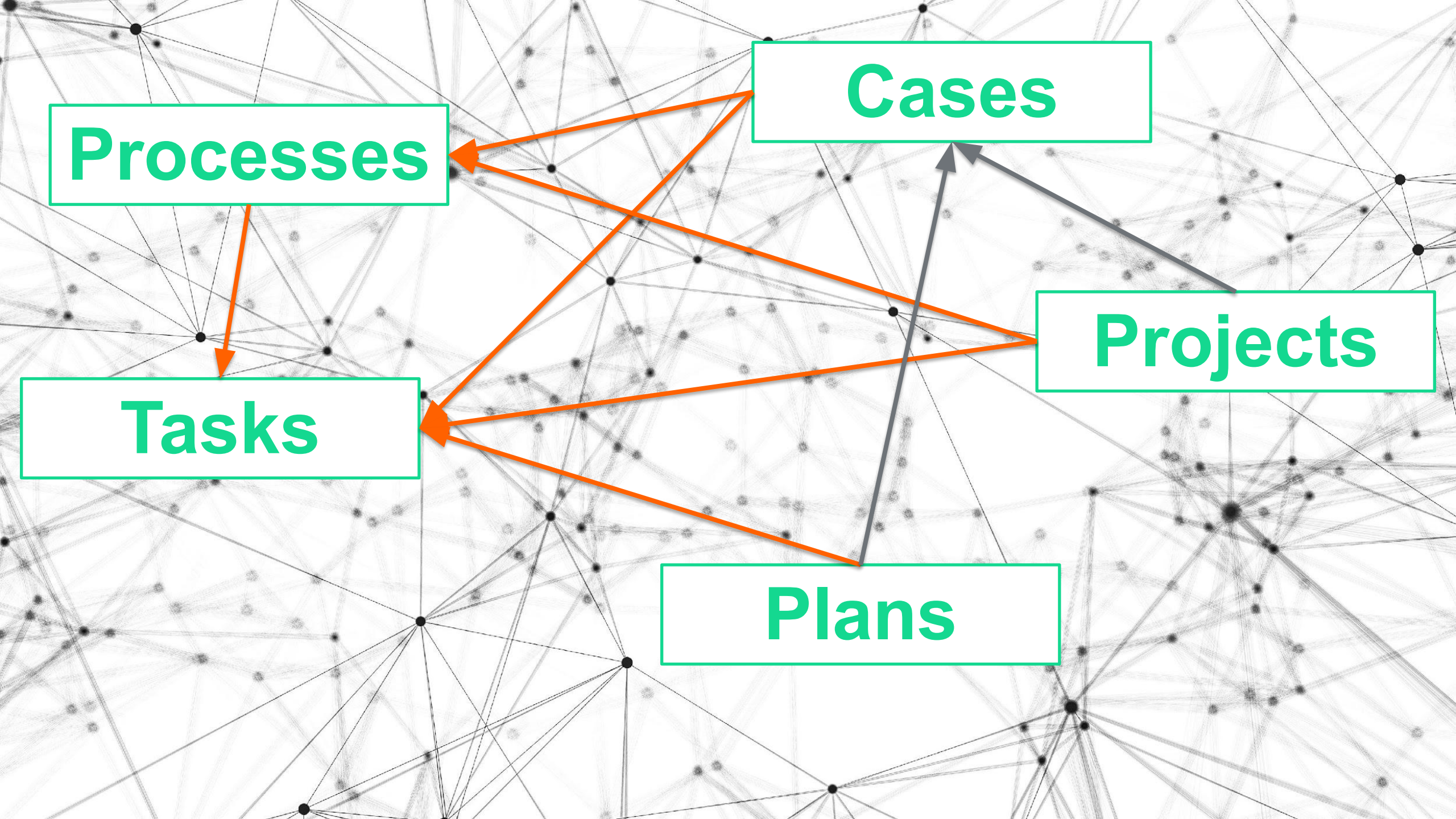
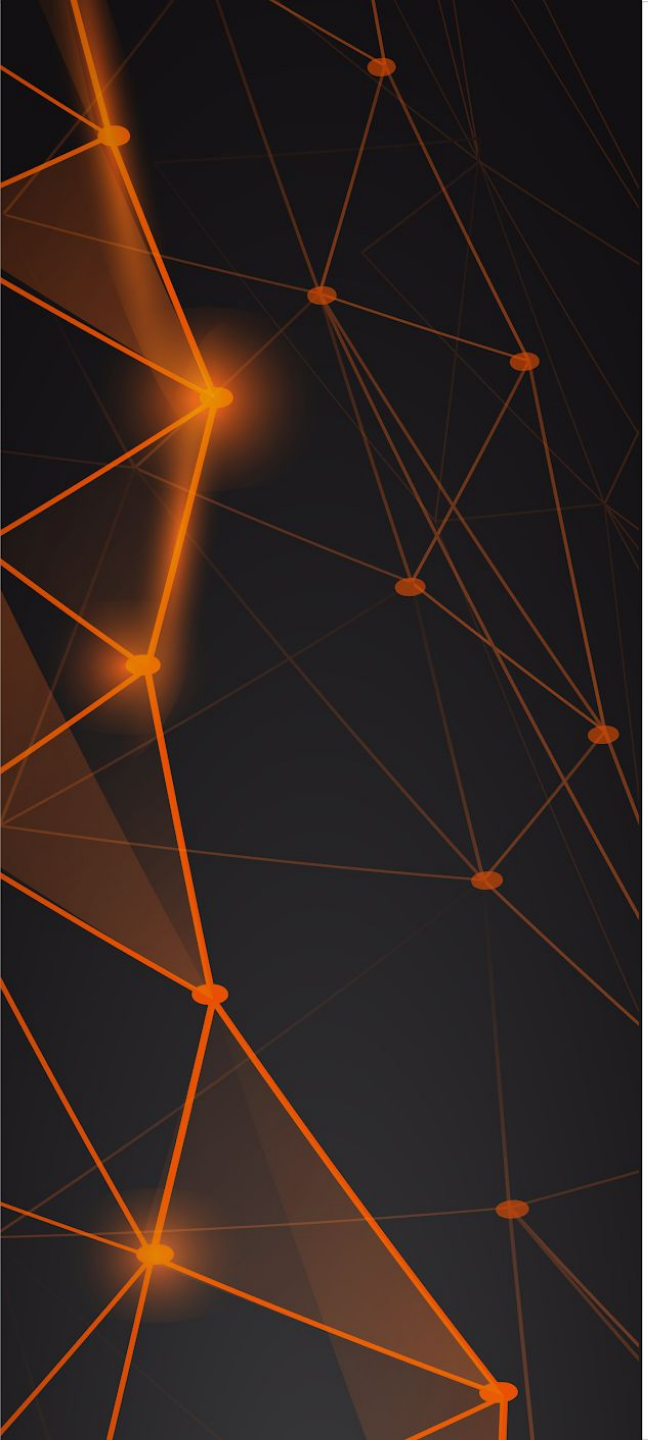
The elephant in the living room


Processes
Cases
Projects
Tasks
Plans

- There is always a case behind a process
- A case may be a generic one, a project or a plan
- Tasks may be organized as processes, or they may be standalone tasks executed in the context of a case



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Processes and Cases

Order-to-cash

Case oriented Work

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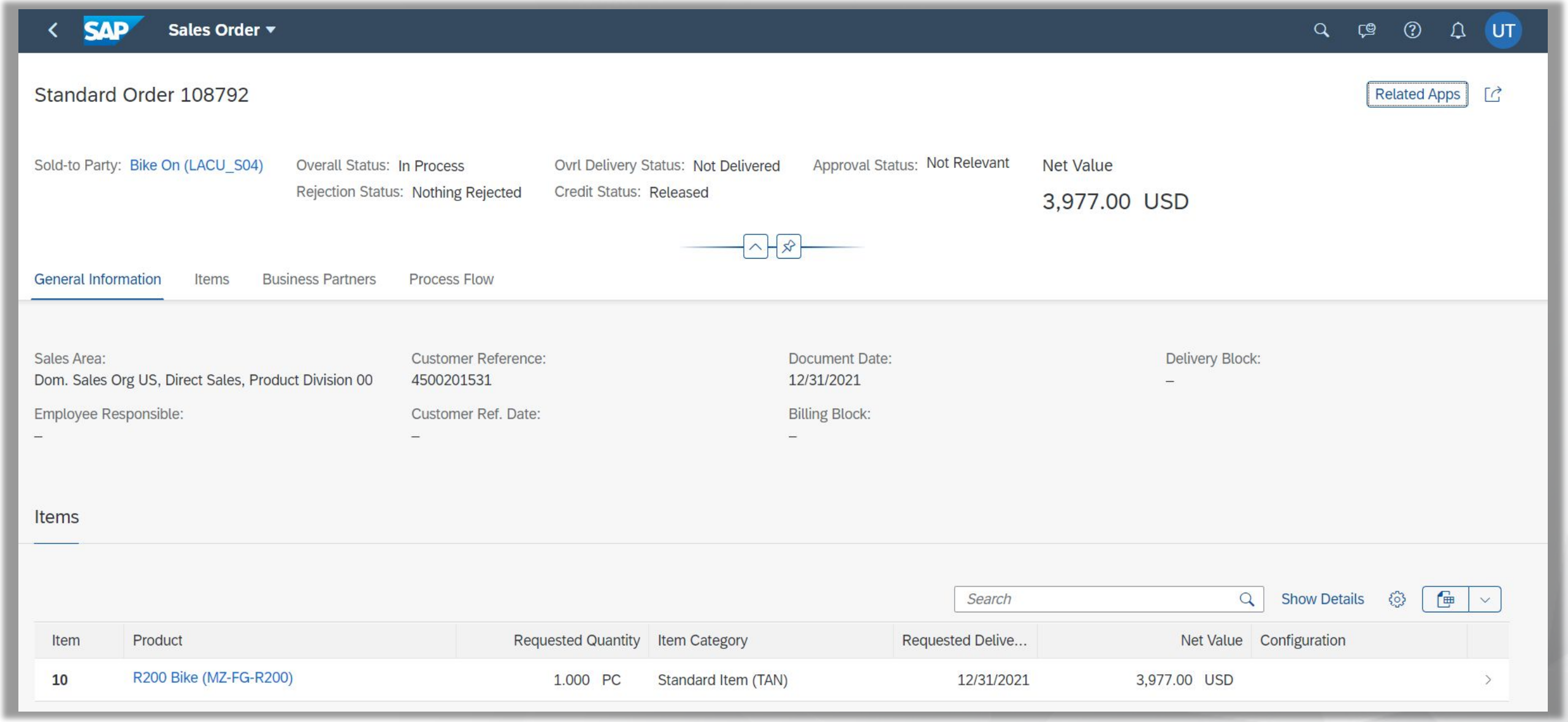

Case oriented Work

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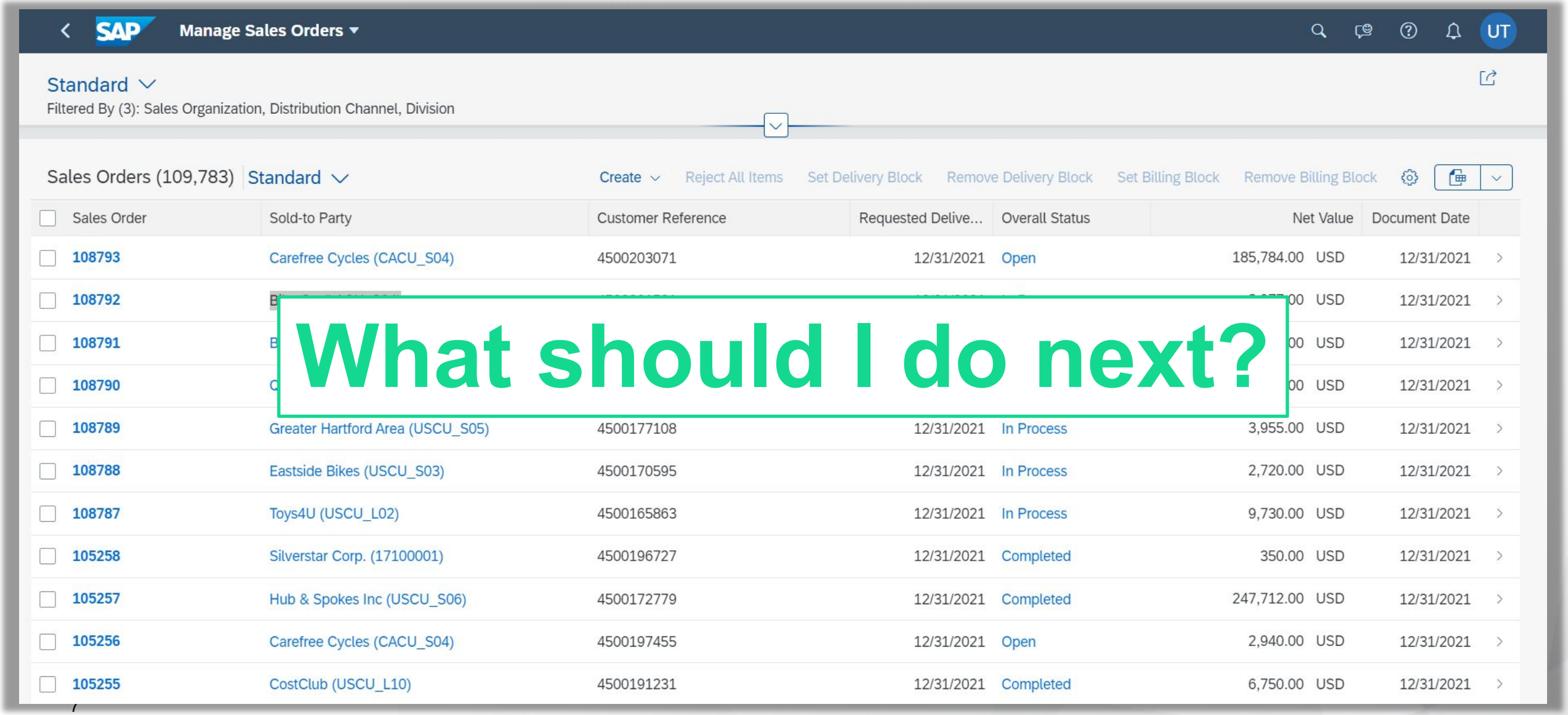
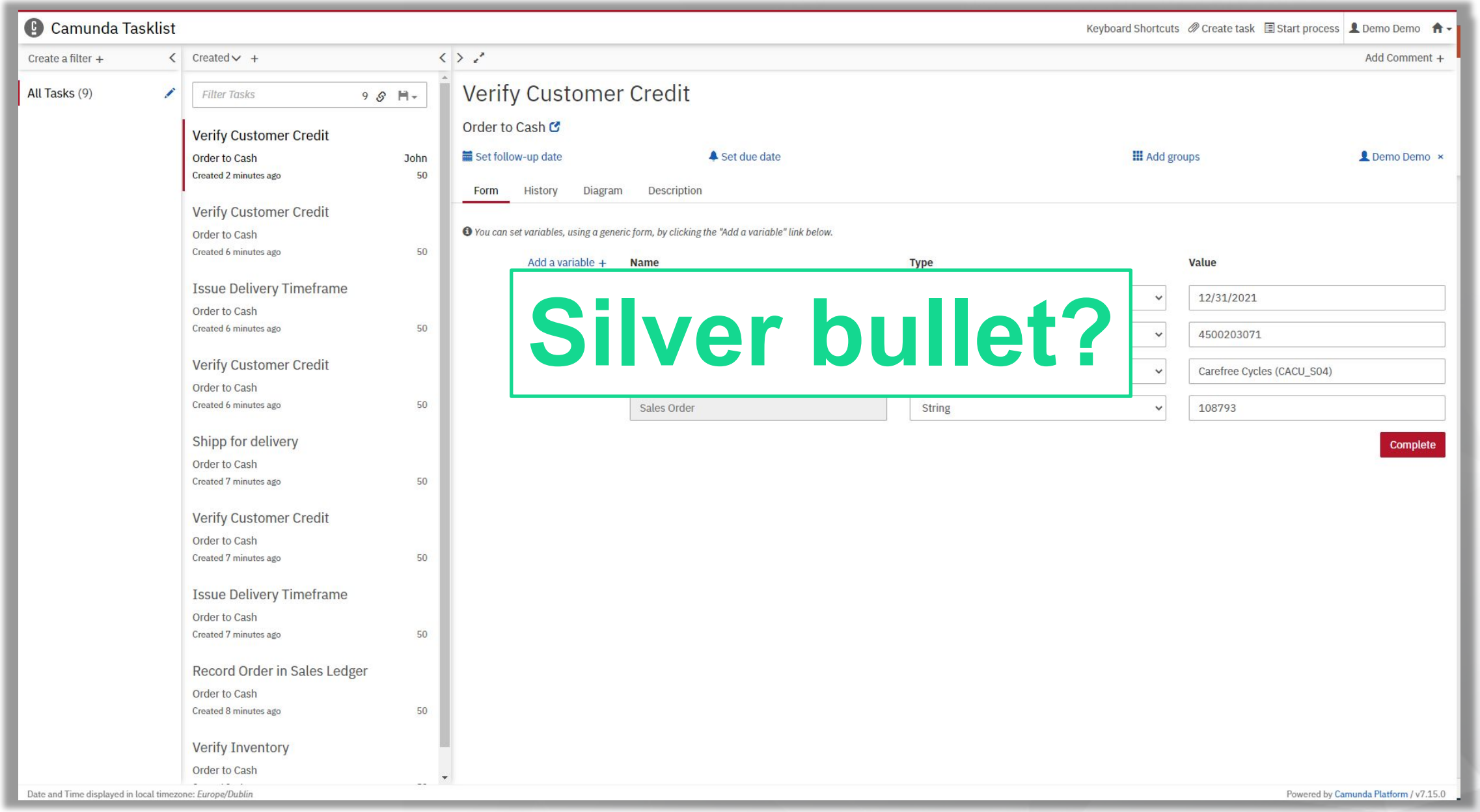


Sales Order	Sold-to Party	Customer Reference	Requested Delive...	Overall Status	Net Value	Document Date
108793	Carefree Cycles (CACU_S04)	4500203071	12/31/2021	Open	185,784.00 USD	12/31/2021
108792					USD	12/31/2021
108791					USD	12/31/2021
108790					USD	12/31/2021
108789	Greater Hartford Area (USCU_S05)	4500177108	12/31/2021	In Process	3,955.00 USD	12/31/2021
108788	Eastside Bikes (USCU_S03)	4500170595	12/31/2021	In Process	2,720.00 USD	12/31/2021
108787	Toys4U (USCU_L02)	4500165863	12/31/2021	In Process	9,730.00 USD	12/31/2021
105258	Silverstar Corp. (17100001)	4500196727	12/31/2021	Completed	350.00 USD	12/31/2021
105257	Hub & Spokes Inc (USCU_S06)	4500172779	12/31/2021	Completed	247,712.00 USD	12/31/2021
105256	Carefree Cycles (CACU_S04)	4500197455	12/31/2021	Open	2,940.00 USD	12/31/2021
105255	CostClub (USCU_L10)	4500191231	12/31/2021	Completed	6,750.00 USD	12/31/2021

Process automation solutions

Task oriented Work



Matching…

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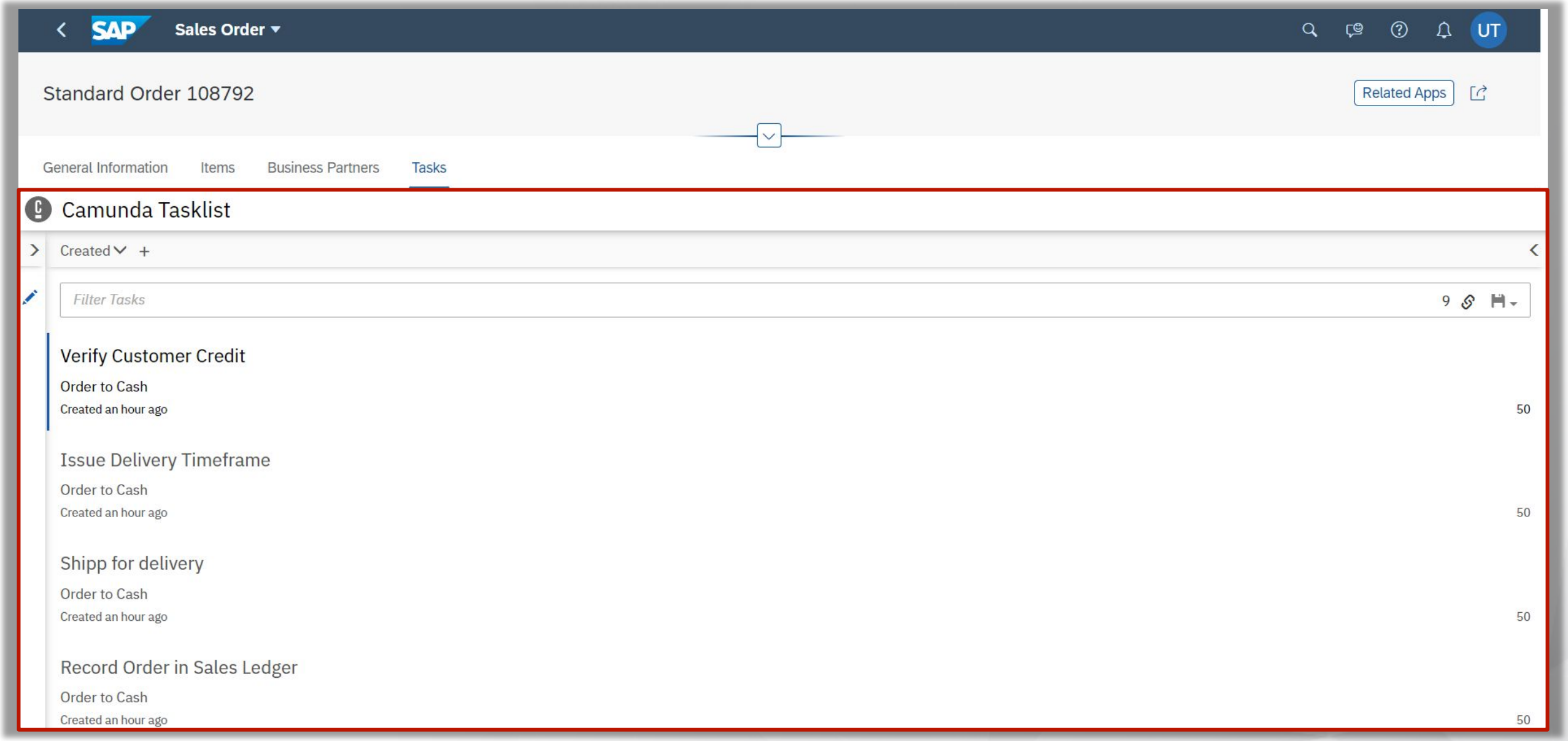

Documents in the process?

Document intensive case

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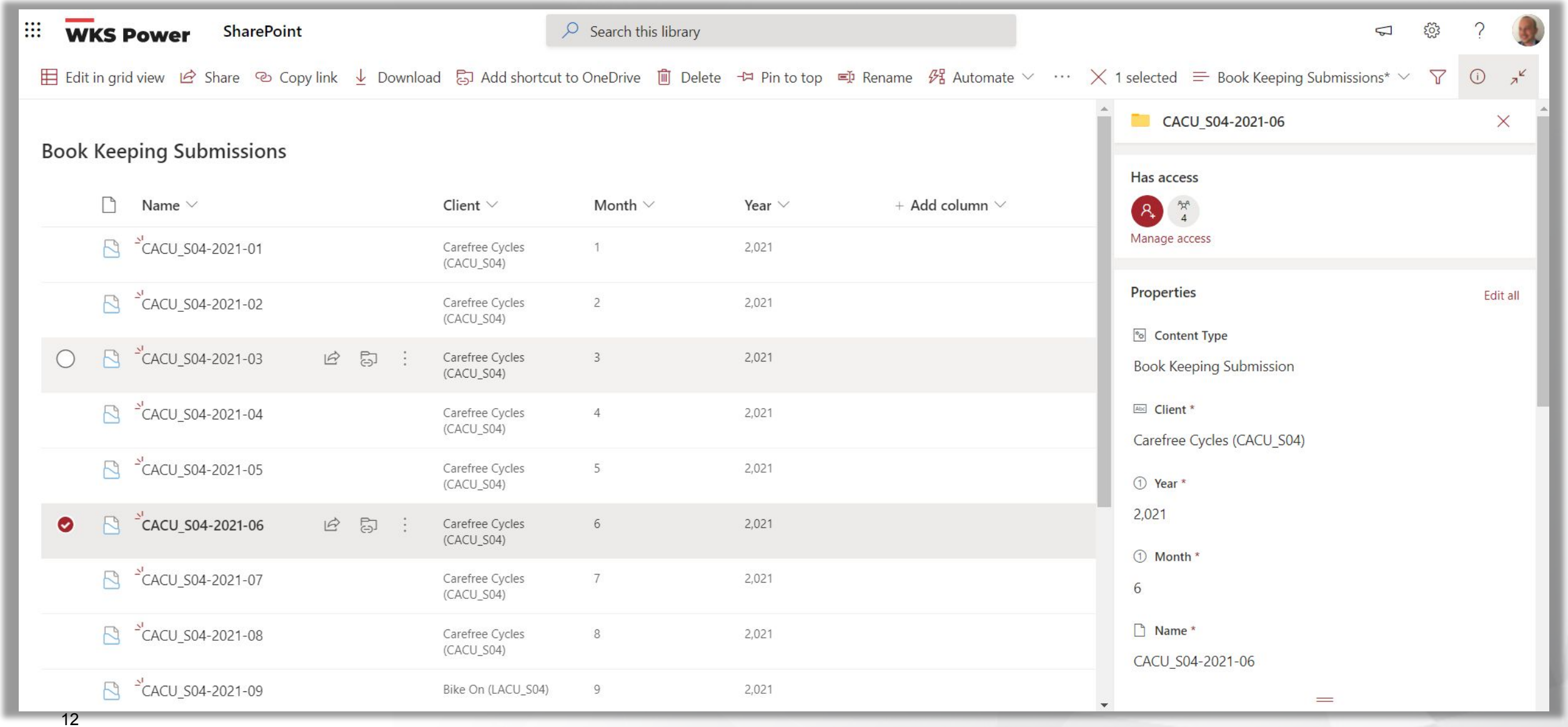

Matching…

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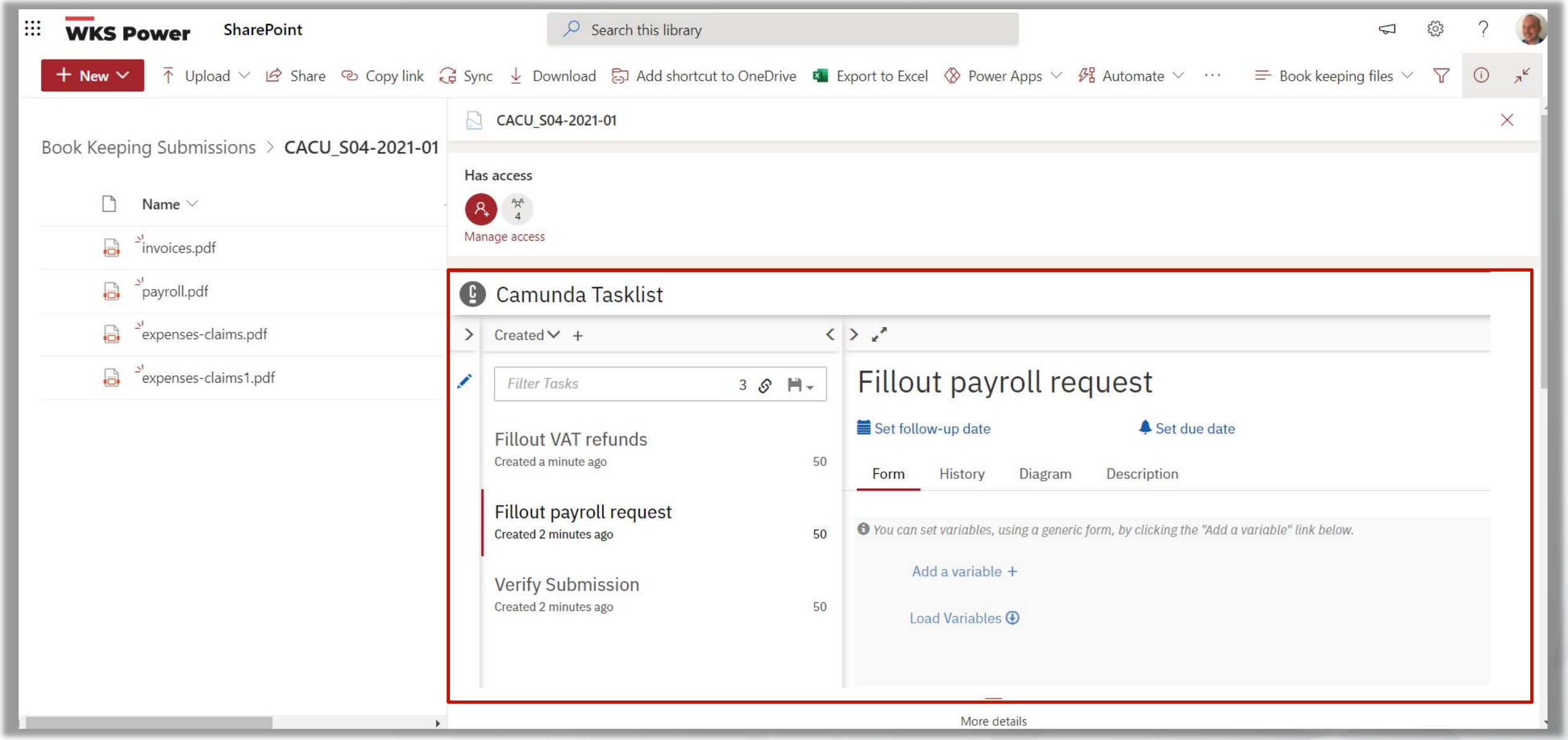

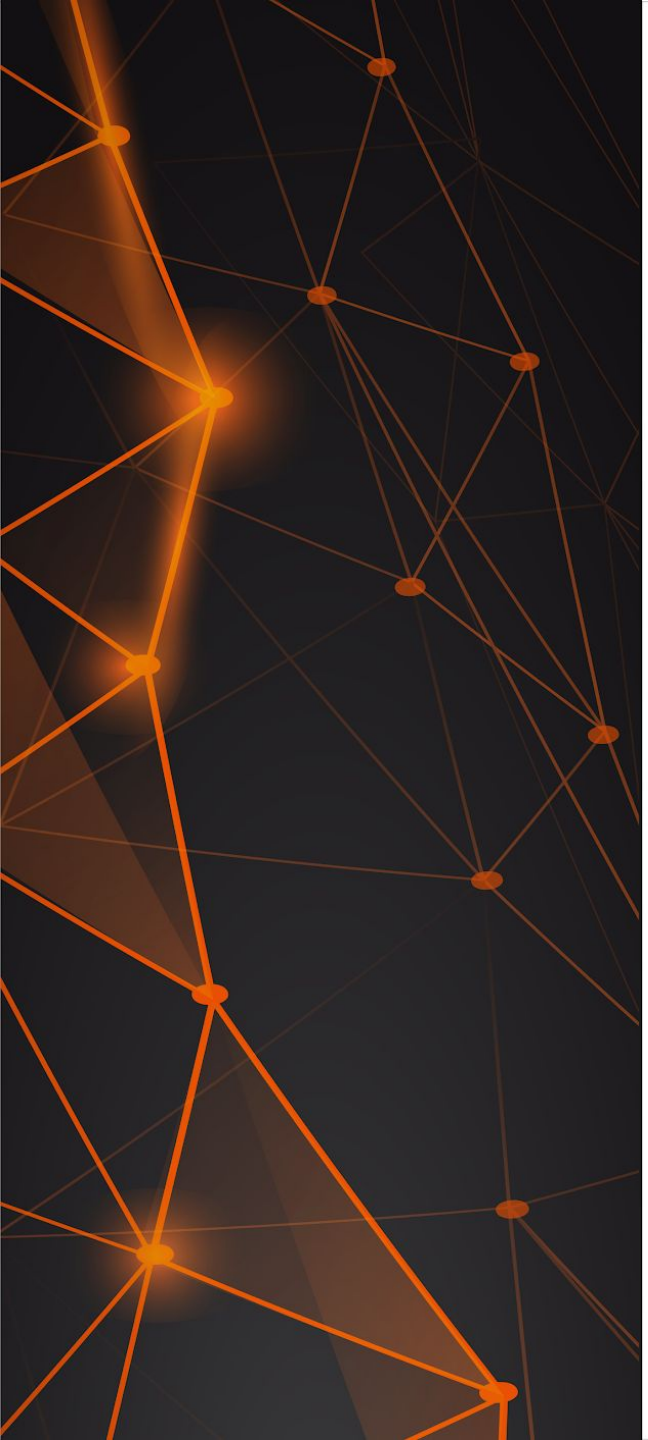

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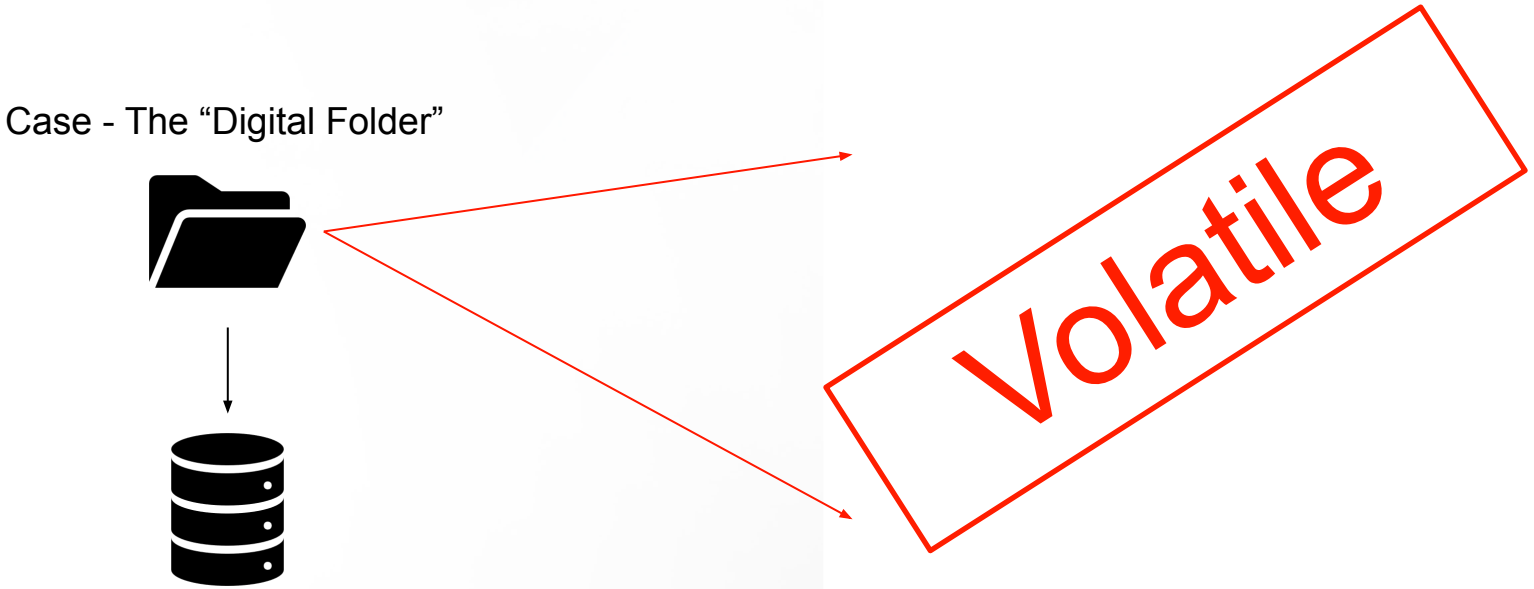
Organizing information

Case Information

Process Information

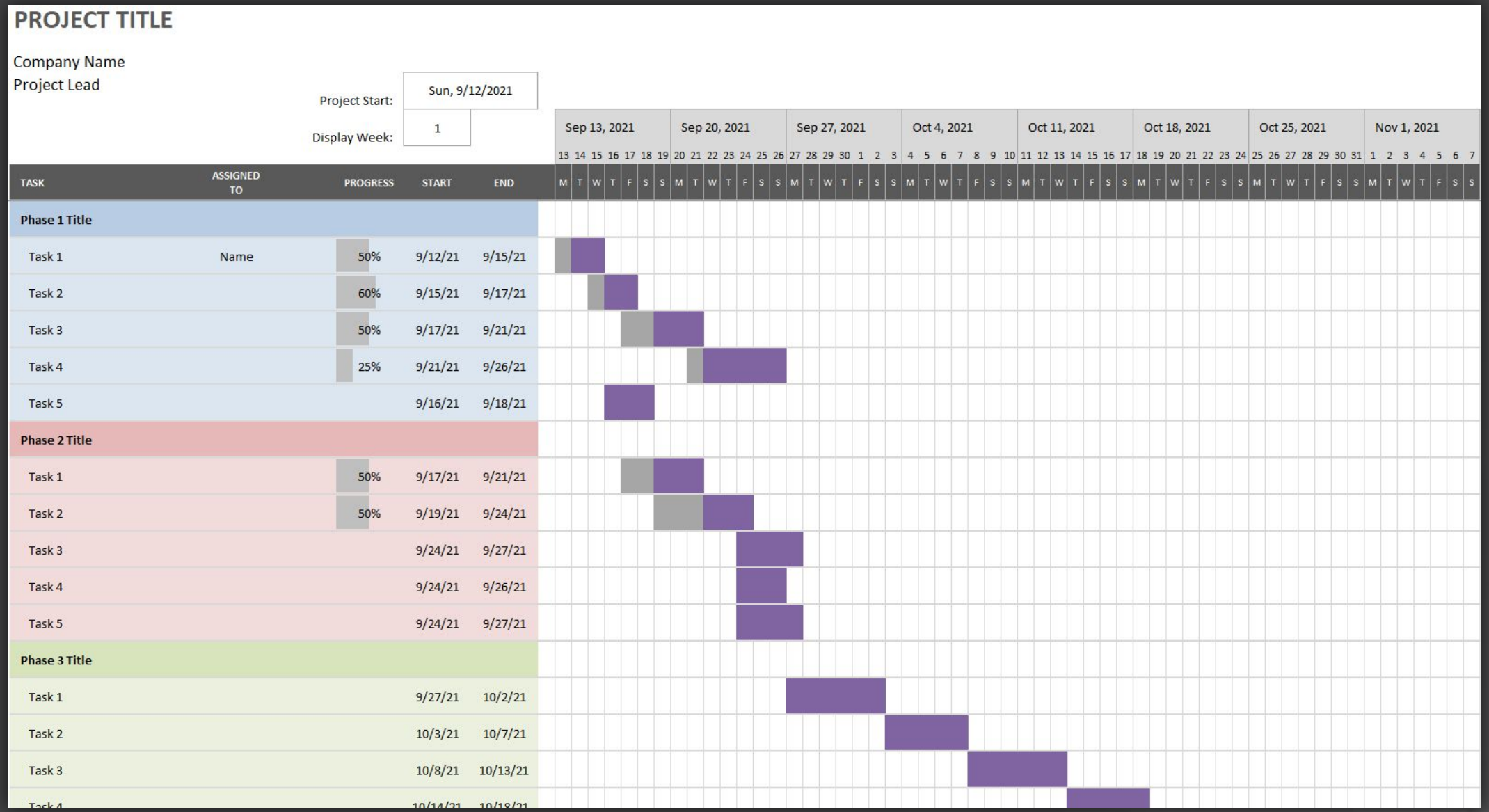
Task Information

Organizing Information



Special types of cases

Processes and Projects



PROJECT TITLE

Company Name
Project Lead

Project Start: Sun, 9/12/2021
Display Week: 1

TASK	ASSIGNED TO	PROGRESS	START	END
Phase 1 Title				
Task 1	Name	50%	9/12/21	9/15/21
Task 2		60%	9/15/21	9/17/21
Task 3		50%	9/17/21	9/21/21
Task 4		25%	9/21/21	9/26/21
Task 5			9/16/21	9/18/21
Phase 2 Title				
Task 1		50%	9/17/21	9/21/21
Task 2		50%	9/19/21	9/24/21
Task 3			9/24/21	9/27/21
Task 4			9/24/21	9/26/21
Task 5			9/24/21	9/27/21
Phase 3 Title				
Task 1			9/27/21	10/2/21
Task 2			10/3/21	10/7/21
Task 3			10/8/21	10/13/21
Task 4			10/14/21	10/18/21

Sep 13, 2021 | Sep 20, 2021 | Sep 27, 2021 | Oct 4, 2021 | Oct 11, 2021 | Oct 18, 2021 | Oct 25, 2021 | Nov 1, 2021

13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6 7

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Process and Plans

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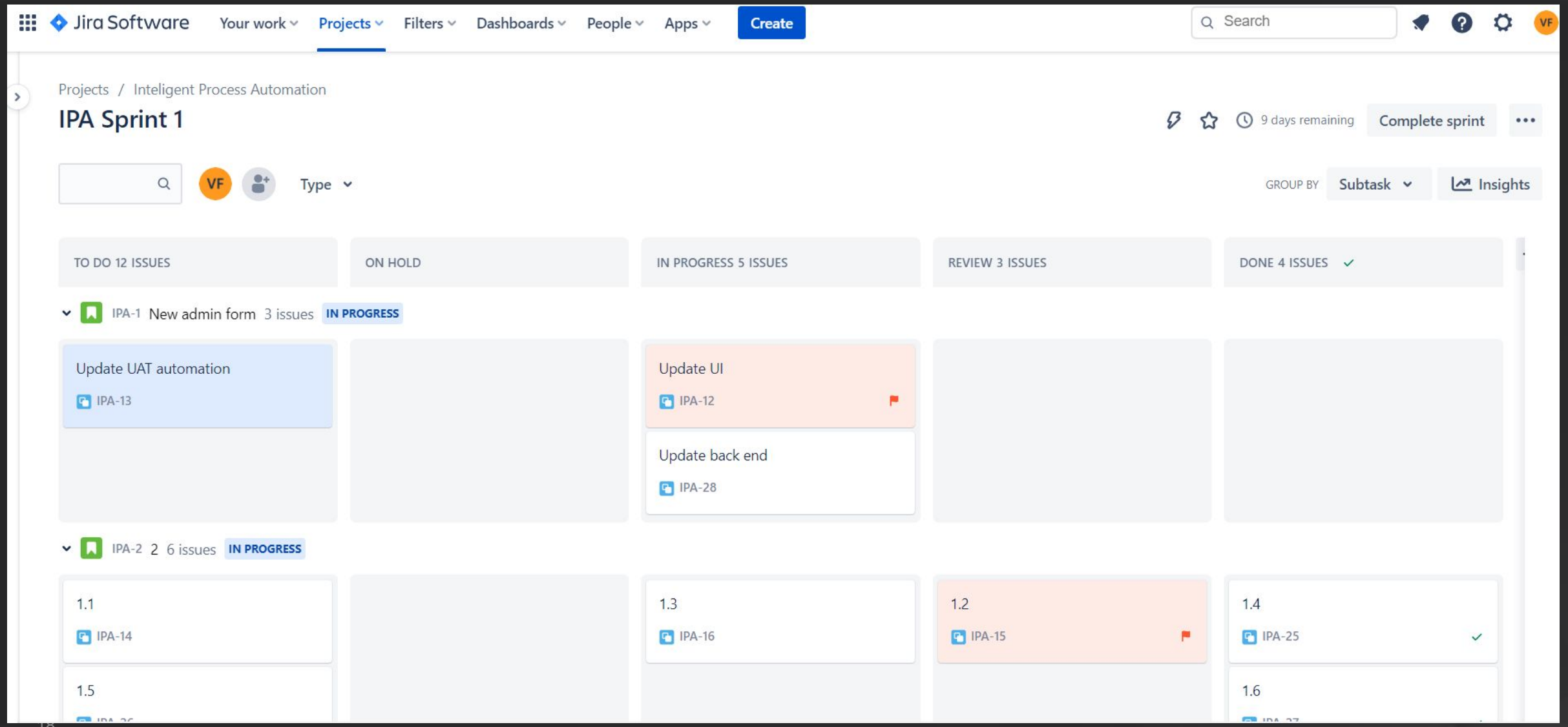

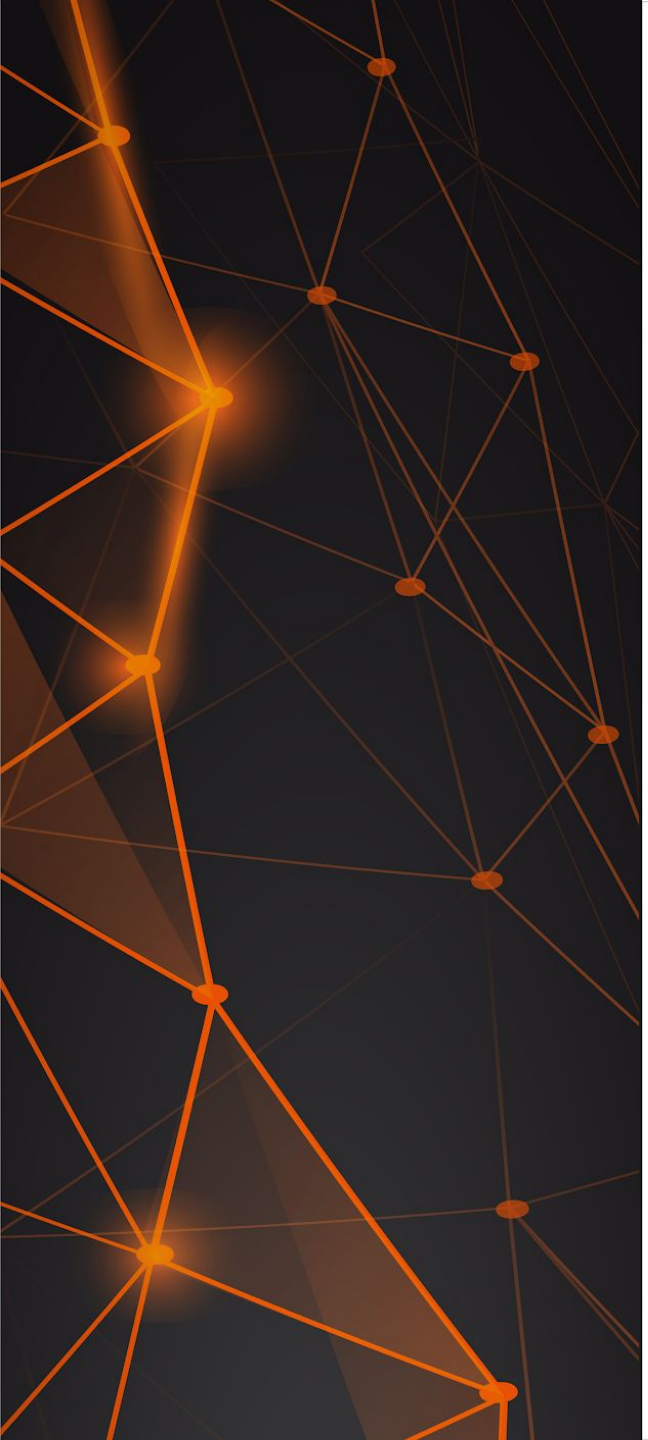

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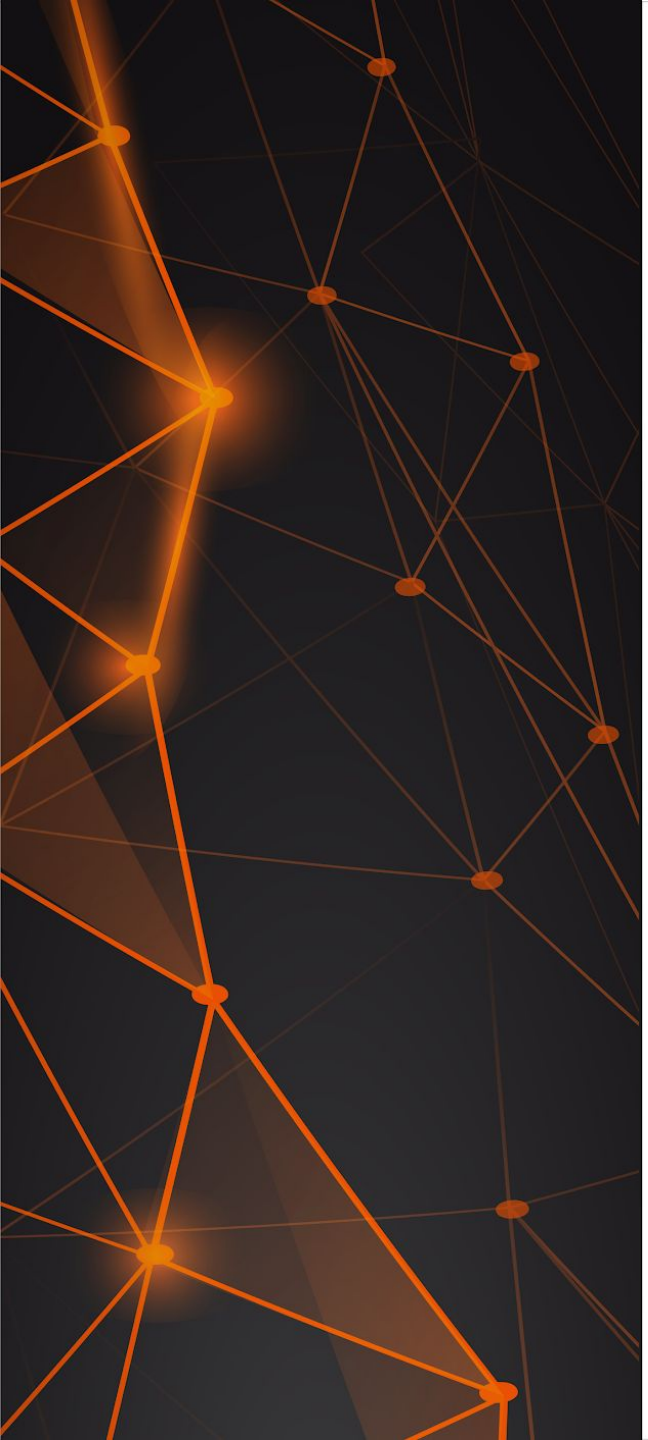
To bear in mind…

There are always cases behind processes and tasks

Find the case type: generic, project, plan? Is it document centric?

Discover and plan case/process/task information structure

Process information is volatile



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Different solutions

There is no silver bullet

Case oriented solution

Task oriented solution

Where should elephants live?

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Questions?