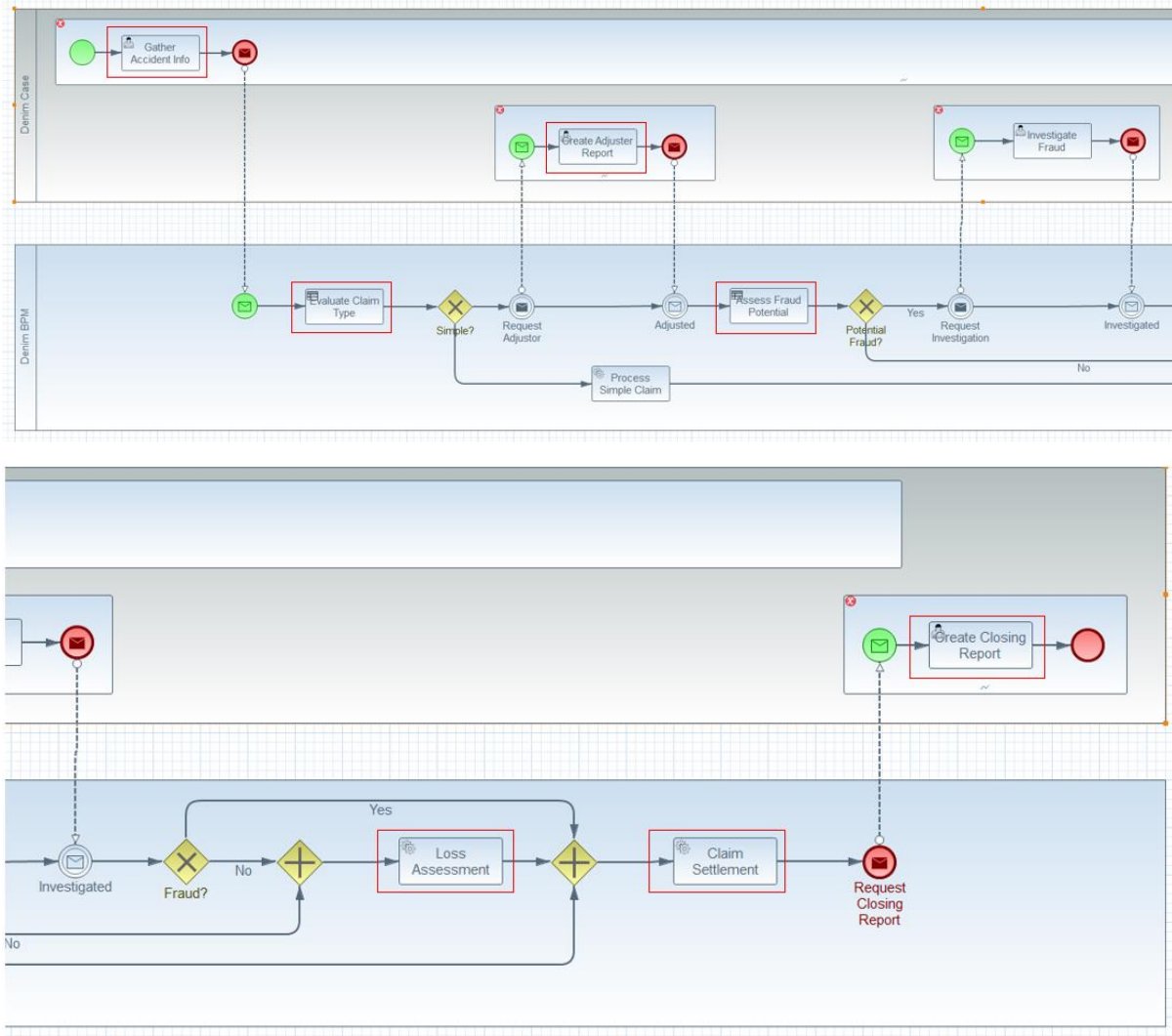


Scenario Summary

The goal is to define and implement an MVP path through the workflow as a first scenario, which can then be iterated and built out to further scenarios. Here is the workflow depicted as a BPMN Collaboration involving BAW Case and BPM aspects with the path through it for MVP highlighted :-



The scenario high level steps are :-

1. Email or phone call received from Customer to report a claim (a car accident damage but no personal injuries or other property damage) and it quotes either the Policy Number or sufficient customer details (e.g. First and last name) to be able to search and find the policy. Customer Intake Services identify the relevant Policy and create a New Claim against it (which is an Activity that can be launched from an existing Auto Policy Case).
2. Case instance starts based on the Policy data extracted from the existing Auto Policy, Claim Intake Services role gets a work item to Gather Accident Information, the end result of which they update the Case with the necessary FNOL data properties.
3. On completion of Gather Accident Information this is when the long-running BPM process is initiated, the first step of which is to handover to a Decision Task to assess the claim type (simple or complex) – for MVP path the accident information will be such that this decision results in a complex claim type.

4. BPM process then hands control to a Case Activity to Create Adjuster Report which the Claim Adjuster then does. As part of this task the Adjuster will also request and upload a Police Report of the accident (a discretionary activity in Case terminology). The adjusters report will include pictures of the damage to the vehicles and will reference the Police Report where some parts of the vehicle were in prior poor condition (this is important for later settlement where only partial reimbursement of the repair costs is agreed).
5. Case returns control to the long-running BPM process where it calls the ODM decision to Assess Potential Fraud – for MVP the data will be such that no potential fraud is the result.
6. BPM process then passes to the Claim Analyst to Estimate Damage. This logical single activity is in fact a collaboration between the Claim Analyst and business partner Repair shops – the analyst selects from the list of preferred suppliers for each vehicle in the region and solicits estimates from them (at least 2 per vehicle), the repairers then provide their estimates online, and finally the analyst reviews the estimates and selects one for each vehicle. This then triggers a recalculation of the total damage estimate (which is needed by the following ODM service).
7. After estimating damage a further ODM step checks for whether the Claim has escalation conditions that would require a Claims Manager to review the estimate. For the MVP the data inputs to ODM will be such that this results in no escalation being needed.
8. BPM process then passes to the Claim Adjuster for them to Create Settlement Offer and in this they use data gathered from the preferred estimates along with police report and adjuster report data to provide a cash settlement offer that is not the full repair amount.
9. BPM process then completes and hands control to a Case Activity for the Claim Adjuster to Create Closing Report (which completes the Case instance).

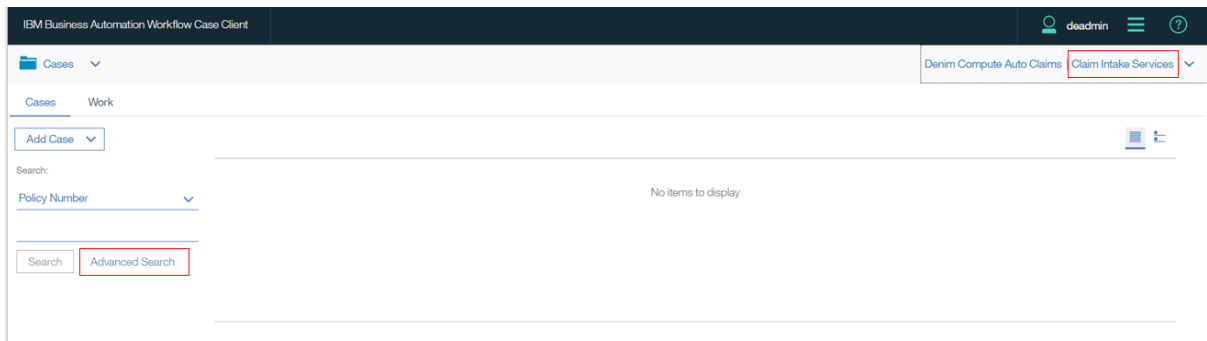
Note that there are many more steps in a realistic Auto Insurance Claims processing scenario, our goal here is to provide sufficient illustrative steps to demonstrate the main components of IBM Cloud Pak for Automation and not to attempt to replicate a true-to-life Auto Insurance Claim. Therefore here are some considerations to keep in mind :-

- In our scenario we do not deal with identifying fault and counter-claiming against the other party insurance carrier, the premise is that we accept liability and the workflow is to establish the amount to settle (provided it is not a fraudulent claim)
- Our scenario will only focus on simple vehicle damage and not any personal injuries as that would require many more steps to perform medical investigations to verify personal injury claims
- Similarly no property damage is considered in the scenario
- In a real-life scenario the arrangements for physical repair of the vehicle(s), once agreed would be performed as part of the claim processing, also, if appropriate, arrangements for the insured to hire a temporary replacement vehicle would be made

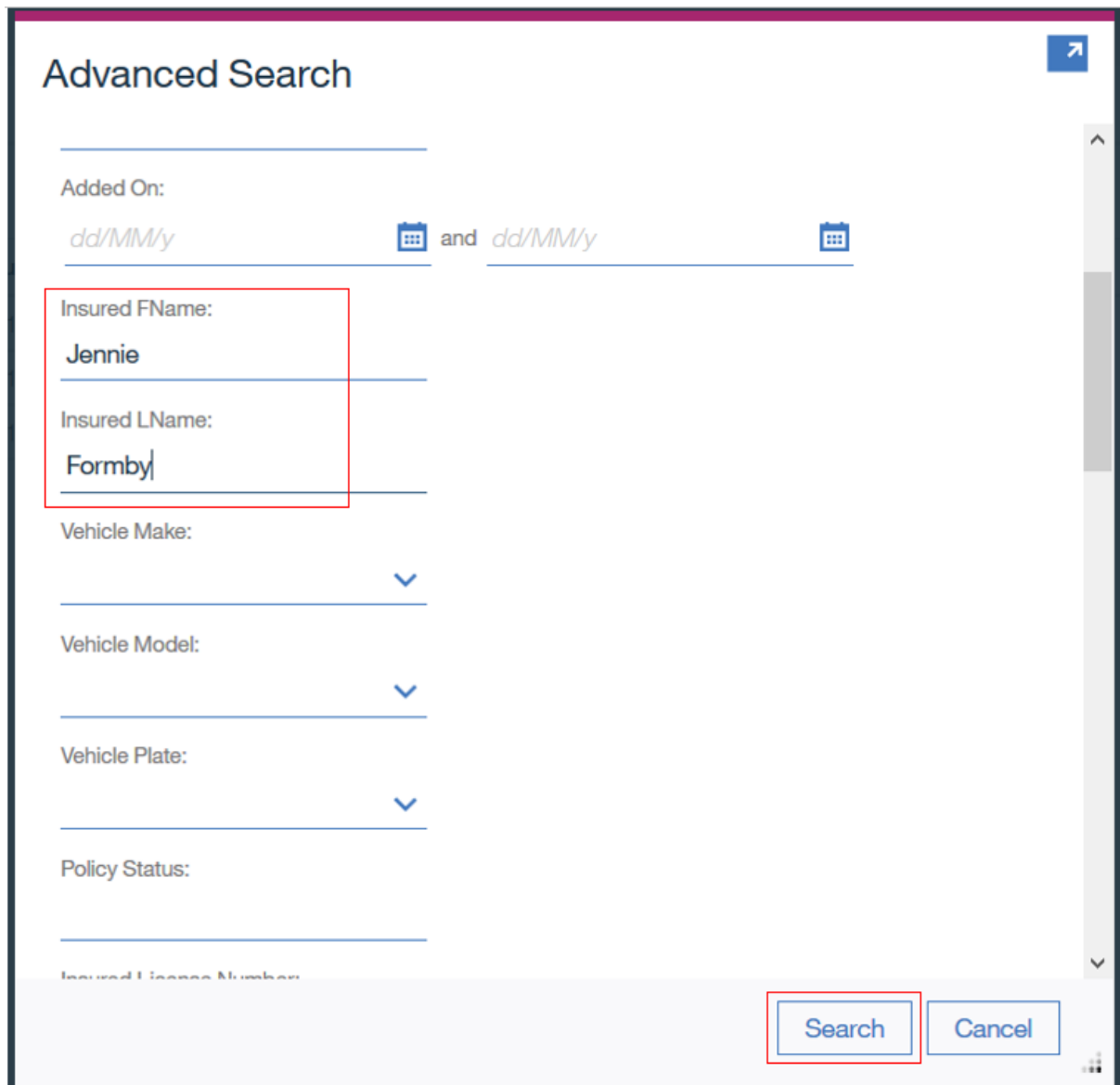
Scenario Walkthrough

(BAW solution version used: v0.6.1)

We start in the role of Claim Intake Services – they have received a phone call or email from the policy holder to report they have been in an accident and wish to make a claim. The caller does not have their policy number to hand, the case worker will instead use their details to search :-



The customer last name and first name are provided to search on :-



The search finds the policy numbered "POL0001" :-

Cases

Cases Work

Add Case

Search:

Policy Number

Title	Insured FName	Insured LName	Case Type	Policy Status	Insured License Number
POL0001	Jennie	Formby	Auto Insurance Policy	Active	LIC-010101

Search Advanced Search

Clicking on this Policy allows for inspecting the policy data including confirming that it is valid for the claim the policy holder wants to now make, the case worker can start a new claim with Add Activity button :-

Cases

Cases Work Auto Policy Case Details

POL0001 Modified: 11/07/2019 14:19 | Auto Insurance Policy

Comments Add Activity Split Case

Policy Documents

Policy

Policy Number	POL0001	Policy Status	Active
Policy Effective Date	01/03/2019	Policy Expiration Date	29/02/2020
Coverage	Premium	Monthly Premium	99

The only available activity type is selected (you could optionally provide a custom meaningful name) to which you click OK on :-

Add

Select a type:

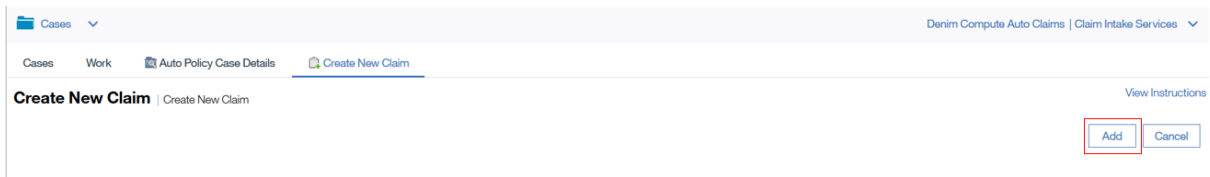
Create New Claim

Enter a name:

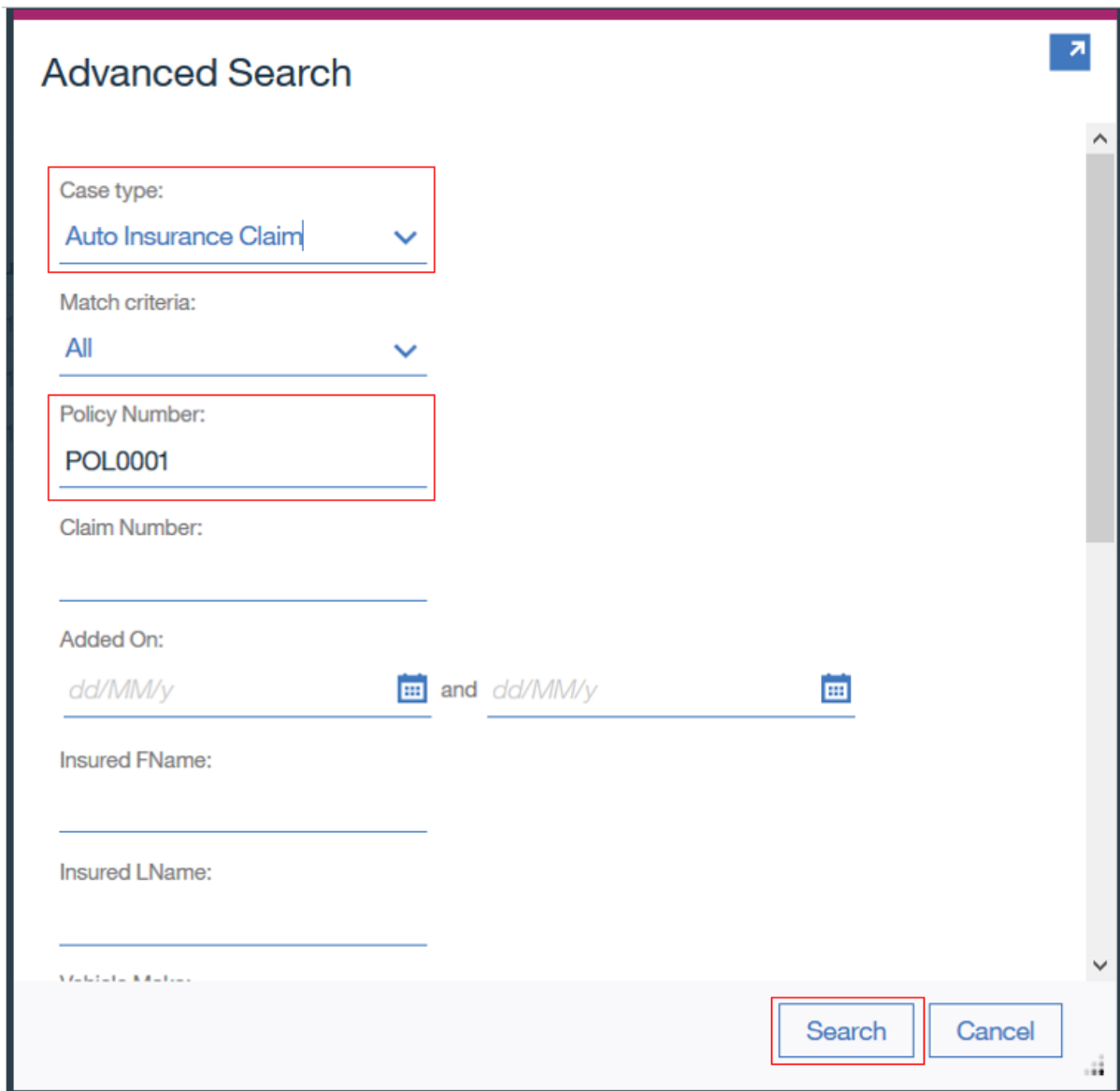
Create New Claim

OK Cancel

And then click Add :-



Back in the Cases view they can refresh the search predicate to search for Auto Insurance Claims for the POL001 Policy Number :-



... and see the newly created claim case type has started (the generated number comes from the policy number) :-

Cases

Cases Work

Add Case

Search: Policy Number

Title	Policy Number	Added On	Case Type
POL0001-001030	POL0001	12/07/2019 07:31	Auto Insurance Claim

Search Advanced Search

The Claim Intake Services role now gets a work item to perform the activity Gather Accident Information which is the first necessary step in the workflow :-

Cases

Cases Work

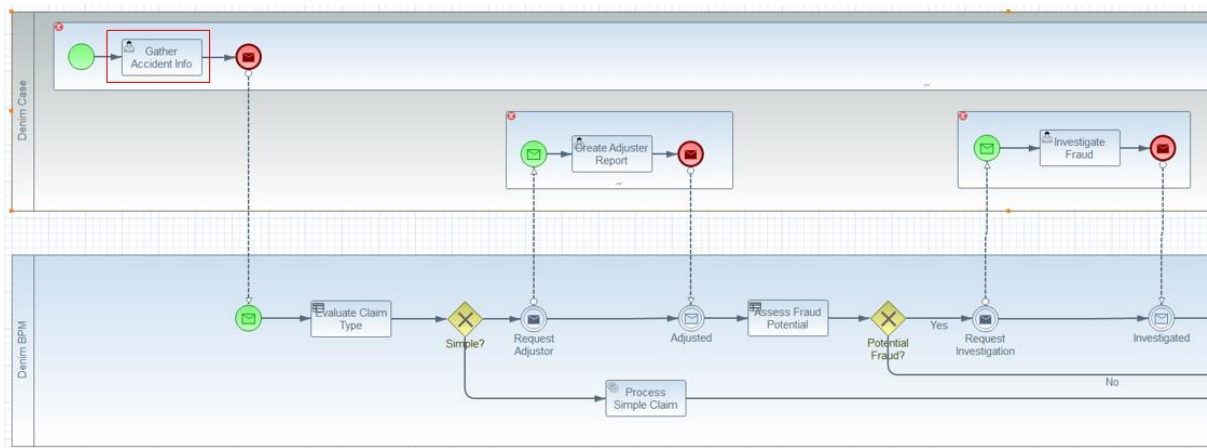
Manage Roles Add Case

Claim Intake Services (2) My Work

Filter: No filters applied Reset

Step Name	Claim Number	Policy Number	Insured LName	Subject	Time Created
Gather Accident Information	POL0001-001030	POL0001	Formby	Gather Accident Information	12/07/2019 07:31

To put this in context this is where we are in the overall workflow :-



A police accident report may optionally be provided for the Case. To do this the Case admin can select the Auto Claim case instance and Add Activity :-

Cases Cases Work **Auto Claim Case Details**

POL0001-001030 | Modified: 12/07/2019 07:31 | Auto Insurance Claim

Comments **Add Activity** Split Case

Claim Documents

▼ Claim

Claim Number POL0001-001030 Clair

They choose from the available activities – in this case just the File Police Accident Report option :-

Add

Select a type:

File Police Accident Report

Enter a name:

File Police Accident Report

OK Cancel

Again click Add on the resulting activity :-

Cases Cases Work Auto Claim Case Details **File Police Report Add Activity** Denim Compute Auto Claims | Claim Intake Services

File Police Accident Report | File Police Accident Report View Instructions

Add Cancel

The Claim Intake Services representative now has an additional work item to file the police report :-

Cases ▼

Cases Work

Manage Roles Add Case ▼

Claim Intake Services (3) My Work

Filter: No filters applied [Reset](#)

Step Name	Claim Number	Policy Number	Insured LName	Subject	Time Created
File Police Report	POL0001-001030	POL0001	Formby	File Police Accident Report	12/07/2019 08:11
Gather Accident Information	POL0001-001030	POL0001	Formby	Gather Accident Information	12/07/2019 07:31

When they open this work item they choose the appropriate Case folder (Police Accident Report) and click File Police Report :-

Cases ▼

Cases Work [File Police Report Work Details File Police Report](#)

File Police Report | File Police Accident Report

Comments

📁 POL0001-001030

Documents Activities History

Add ▼ Actions ▼ **File Police Report**

[Home](#) > **Police Accident Report**

Name ⌵

They browse and select the document to upload, choose the appropriate document class (Police Accident Report) and the case correlating information is prepopulated :-

General

* Save in: Police Accident Report

What do you want to save? Local document

* File name: vehicle-accident-police-report-example.pdf

Major version ?

Properties

* Class: Police Accident Report

Document Title: ? vehicle-accident-police-report-example.pdf

Police Report Number: ?

Claim Number: ? POL0001-001030

Policy Number: ? POL0001

They then provide a police report number and add the document :-

Properties

* Class: Police Accident Report

Document Title: ? vehicle-accident-police-report-example.pdf

Police Report Number: ? REP-12345

Claim Number: ? POL0001-001030

Policy Number: ? POL0001

You then see the added document in the folder :-

Cases ▼

Cases Work 📎 File Police Report Work Details File Police Report

File Police Report | File Police Accident Report


Comments

📁 POL0001-001030

Documents Activities History

Add ▼ Actions ▼ File Police Report

Home > Police Accident Report

Name	Modified By	Modified On
 vehicle-accident-police-report-example.pdf	deadmin	12/07/2019 08:28

The case worker also fills in some example data regarding the police findings :-

Cases ▼

Cases Work 📎 File Police Report Work Details File Police Report *

Properties:

▼ Claim

Claim Number	POL0001-001030	Policy Number	POL0001
--------------	----------------	---------------	---------

▼ Accident

Police Report Number	REP-12345
Prevailing Speed Limit	40
Vehicle Speed	45
Other Vehicle Speed	38

▼ Insured Vehicle

Vehicle Condition

Tyres - legal but thread depth low on nearside front, braking system - adequate, front headlamp defective, hood showing excessive signs of wear

▼ Driver

Drivers Police Assessment

Driver passed breath specimen test, cell phone records suggest they were using device at or around time of impact, driver was exceeding designated speed limit but within tolerances

▼ Other Vehicle

Other Vehicle Condition

Tyres - legal with adequate thread depth, braking system - adequate, vehicle overall condition good with no defects detected

▼ Other Vehicle Driver

Other Vehicle Driver Police Assessment

Driver passed breath specimen test, was within designated speed limit

... and then clicks Complete :-

The screenshot shows a web application interface for 'File Police Report'. At the top, there are navigation tabs for 'Cases' and 'Work'. The main header reads 'File Police Report | File Police Accident Report'. On the right side, there are three buttons: 'Complete', 'Save', and 'Close'. The 'Complete' button is highlighted with a red rectangular box. Below the buttons, there are sections for 'Comments' (with a text input field containing 'POL0001-001030'), 'Documents', 'Activities', and 'History'. At the bottom, there are 'Add' and 'Actions' dropdown menus, and a 'File Police Report' button.

The case worker then opens their original work item (Gather Accident Information) and are presented with a UI showing relevant data fields either already gathered from the policy or to be input here as part of this activity :-

The screenshot shows a web application interface for 'Gather Accident Information'. At the top, there are navigation tabs for 'Cases' and 'Work'. The main header reads 'Gather Accident Information | Gather Accident Information'. Below the header, there are 'Comments' and 'Documents' tabs. The 'Claim' tab is selected, showing a list of claim details. The details are organized into two columns:

Claim Number	POL0001-001030	Policy Number	POL0001
Date Reported	12/07/2019	Policy Expiration Date	29/02/2020
Policy Effective Date	01/03/2019	Date Of Last Claim	12/07/2019
* Coverage	Premium	Policy Status	Active

The case worker completes accident data they have obtained (here is an example – note of particular importance is the “On Private Property” setting to ensure the ODM Decision qualifies this as a complex Claim scenario”):-

Cases Work [Gather Accident Information](#) [Gather Accident Information *](#)

Claim Documents

Describe Loss Location
Junction of A46 and R66 intersection

Description Loss/Damage
Collision

* Date-Time of Loss	01/07/2019	02:00	<input checked="" type="checkbox"/> Police or Fire Dept Contacted
Loss Street	Las Vegas Blvd		
Loss City	Las Vegas		
Loss State	NV		
Loss ZIP	89101		
<input checked="" type="checkbox"/> On Private Property			
Weather Condition	Heavy Rain		

And some more (note there are selection lists of items that drive the level of interactivity later in this scenario so it is important to choose certain vehicles – for example the Auto Policy insured vehicle is already set to this one) :-

Insured Vehicle

* Vehicle Make	Mercedes	* Vehicle Plate	GIL1057
* Vehicle Model	E-Class	* Vehicle State	NV
Vehicle Year	2017	* Vehicle ZIP	89101
* Purpose of Use	Driving for Employer	* Vehicle VIN	VIN111-222-333
Vehicle Context	Moving	Vehicle Damage Estimate	1234

And for other vehicle we choose this set of data :-

Other Vehicle

Other Vehicle Make	Cadillac	Other Vehicle Policy Number	SF-99999
Other Vehicle Model	Escalade	Other Vehicle Context	Moving
Other Vehicle Year	2016	Other Vehicle Insurance	State Farm
Other Vehicle Plate	X865PHX	Damage Estimate	4321
Other Vehicle State	CO		
Other Vehicle VIN	VIN444-555-666		
Other Vehicle ZIP	80911		

(Note of the above the context-sensitive items that drive later behaviour are Make, Model, Plate, VIN and ZIP). Note any other data is not relevant to the MVP scenario so it does not matter what values, if any, are provided for those sections. It is a good idea to Save the work after providing all these inputs :-

Comments

Close Save Validate and Complete

Claim Documents

Claim

Claim Number	POL0001-001030	Policy Number	POL0001
Date Reported	31/07/2019	Policy Expiration Date	29/02/2020
Policy Effective Date	01/03/2019	Date Of Last Claim	31/12/2018
Coverage	Premium	Policy Status	Active

The case worker can also inspect and upload any relevant case documents, in this situation the case worker wants to file a picture of the crash scene they have received in the relevant case folder :-

Cases

Cases Work Gather Accident Information Gather Accident Information

Gather Accident Information | Gather Accident Information

Comments

Claim Documents

POL0001-001030

Documents Activities History

Add Add Document Set Property Actions

Home

Name	Modified By	Modified On
Adjuster Report	deadmin	12/07/2019 07:31
Damages Evidence	deadmin	12/07/2019 07:31
Police Accident Report	deadmin	12/07/2019 07:31
Repair Estimates and Invoices	deadmin	12/07/2019 07:31

The user then selects the Add Document Set Property custom menu option :-

Cases Work Gather Accident Information Gather Accident Information

Gather Accident Information | Gather Accident Information

Comments

Claim Documents

POL0001-001030

Documents Activities History

Add Add Document Set Property Actions

Home > Damages Evidence

Name

The dialogue launches and they can select from the available document classes (in this case Claim Supporting Document), there are document metadata properties defined for the class and in this one the Claim Number and Policy Number are pre-populated from the case instance :-

General

* Save in: Damages Evidence

What do you want to save? Local document

* File name: Browse... No files selected.
 Major version ⓘ

Properties

* Class: Claim Supporting Document

Document Title: ⓘ

Claim Number: ⓘ POL0001-001030

Policy Number: ⓘ POL0001

Browse and select the relevant file and then Add :-

General

* Save in: Damages Evidence

What do you want to save? Local document

* File name: Browse... auto-accident-scene.jpg
 Major version ⓘ

Properties

* Class: Claim Supporting Document

Document Title: ⓘ auto-accident-scene.jpg

Claim Number: ⓘ POL0001-001030

Policy Number: ⓘ POL0001

Add Document

The values that you enter for the document properties can be used to find the document later.

Add

Cancel

After adding the crash scene picture you see it in the folder :-

Gather Accident Information | Gather Accident Information

Comments


Claim Documents

POL0001-001030

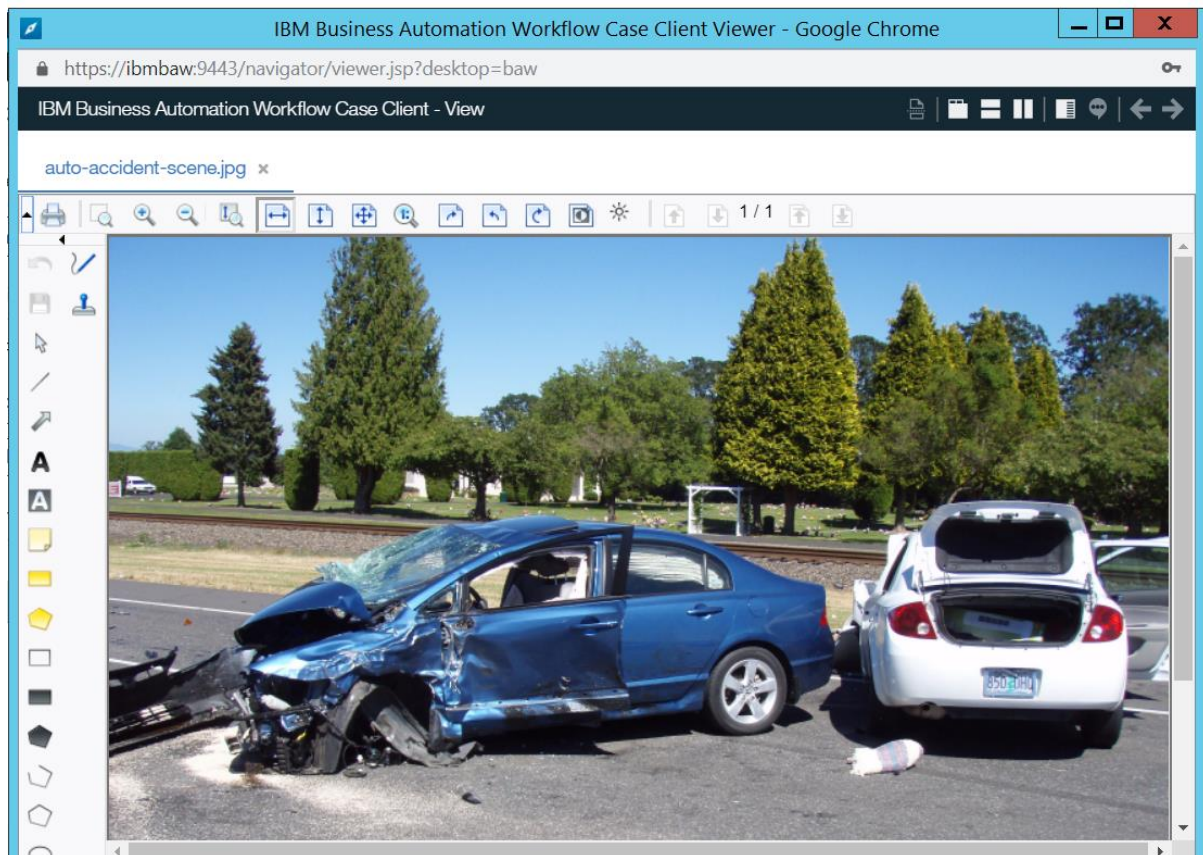
Documents Activities History

Add Add Document Set Property Actions

Home > Damages Evidence

Name	Modified By	Modified On
 auto-accident-scene.jpg	deadmin	12/07/2019 10:23

And clicking on it launches the Daeja One viewer to display it :-



We are also going to upload a number of vehicle damage documents which will be used later on inside the Estimate Damages BPM activity (so that we can see Coach technology interacting with content). This time we choose the Vehicle Damage class and we set the vehicle registration plate (which later we use to correlate on against the various vehicles involved in the claim) :-

▼ General

* Save in: Damages Evidence

What do you want to save? Local document

* File name: Browse... vehicle-damage-GIL1057.jpg

Major version ⓘ

▼ Properties

* Class: Vehicle Damage

Document Title: ⓘ vehicle-damage-GIL1057.jpg

Document Type: ⓘ Image

Vehicle Plate: ⓘ GIL1057

We also add a sample stock MP4 video and associate it with the same vehicle plate :-

▼ General

* Save in: Damages Evidence

What do you want to save? Local document

* File name: Browse... SampleVideo1.mp4

Major version ⓘ

▼ Properties

* Class: Vehicle Damage

Document Title: ⓘ SampleVideo1.mp4

Document Type: ⓘ Video

Vehicle Plate: ⓘ GIL1057

We also add another image for a different plate (we make sure we match it to the plate chosen for the other vehicle involved in the claim) :-

▼ General

* Save in: Damages Evidence

What do you want to save? Local document

* File name: **Browse...** vehicle-damage-X865PHX.jpg

Major version ⓘ

▼ Properties

* Class: Vehicle Damage

Document Title: ⓘ vehicle-damage-X865PHX.jpg

Document Type: ⓘ Image

Vehicle Plate: ⓘ X865PHX

After this we have these documents uploaded :-




Claim Documents

POL0001-001030

Documents Activities History

Add Add Document Set Property Actions

Home > Damages Evidence

Name	Modified By	Modified On
 SampleVideo1.mp4	deadadmin	12/07/2019 10:31
 auto-accident-scene.jpg	deadadmin	12/07/2019 10:23
 vehicle-damage-GIL1057.jpg	deadadmin	12/07/2019 10:30

Before completing we want to demonstrate a sample custom validation added to this case activity. To do that we deliberately set a Date Reported time in the future and then click Validate and Complete :-

Gather Accident Information | Gather Accident Information View Instructions

Comments Close Save **Validate and Complete**

Claim Documents

▼ Claim

Claim Number	POL0001-001030	Policy Number	POL0001
Date Reported	29/09/2069	Policy Expiration Date	29/02/2020
Policy Effective Date	01/03/2019	Date Of Last Claim	31/12/2018
* Coverage	Premium	Policy Status	Active

We get a popup warning and the Complete does not transition from this page :-

er Accident Information | Gather Accident Information View In

ments Close Save Validate and Co

Documents

aim

Invalid Accident Report Date
 OK

Claim Number	POL0001-001030	Policy Number	POL0001
Date Reported	29/09/2069	Policy Expiration Date	29/02/2020
Policy Effective Date	01/03/2019	Date Of Last Claim	31/12/2018
* Coverage	Premium	Policy Status	Active

We correct the date (ensuring it is not a future date) and retry and this time Complete finishes as expected :-

▼ Claim

Claim Number	POL0001-001030
Date Reported	12/07/2019
Policy Effective Date	01/03/2019
* Coverage	Premium

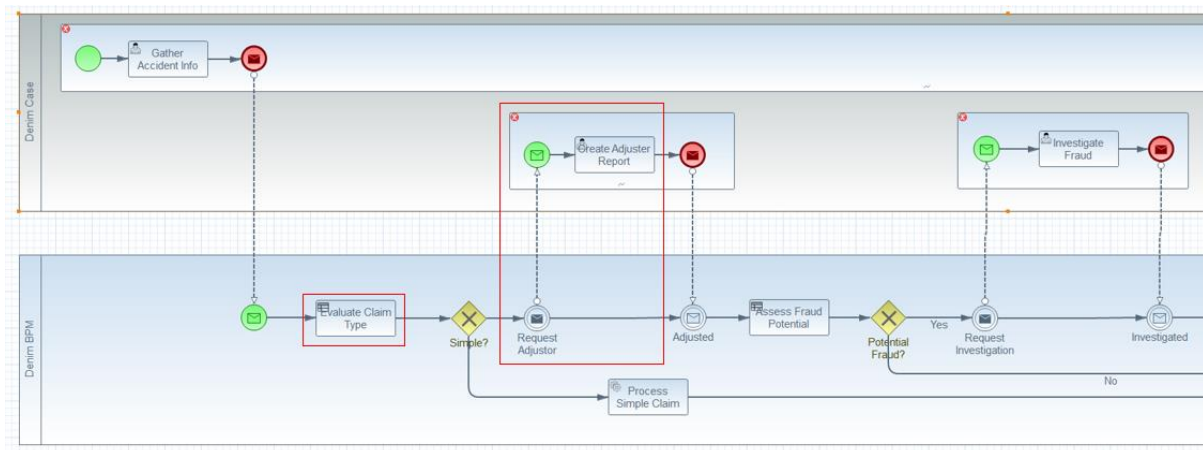
Behind the scenes there is communication going on now from Case – BPM in order to pass control and BPM has to gather the properties and build up more complex data structures that are needed by next steps in the workflow that are performed in ODM. Logging uses correlation data (the Claim Number and Policy Number) as in IBM Cloud Pak for Automation there will be a need to configure Elasticsearch and Kibana and view a thread of execution across all the component pillars :-

```

[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - dataMappings[0].attributeName: vehicleModel
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - dataMappings[0].caseProperty: UESTI_VehicleModel
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - dataMappings[0].casePropValue: RS
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - dataMappings[0].attributeName: vehicleYear
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - dataMappings[0].caseProperty: UESTI_VehicleYear
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - dataMappings[0].casePropValue: 2017
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - Read Case Properties - EXIT
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - Set BO Attributes from Case Properties - ENTRY
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - businessObject[number]: P1204
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - businessObject[effectiveTo]: Tue Jan 01 05:00:00 EST 2019
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - businessObject[expiration]: Tue Dec 31 05:00:00 EST 2019
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - businessObject[dateOfLastClaim]: Sun Feb 03 05:00:00 EST 2019
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - businessObject[branch/branch]: SO
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - businessObject[salesChannel]: CallCenter
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - businessObject[coverage]: Extended
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - businessObject[vehicleMake]: Audi
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - businessObject[vehicleModel]: RS
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - businessObject[vehicleYear]: 2017
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - Set BO Attributes from Case Properties - EXIT
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - Map SO Input - EXIT
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - Map SO Input - ENTRY
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - Create Case Property to Attribute Mappings from CSV List - ENTRY
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - Create Case Property to Attribute Mappings from CSV List - EXIT
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - Read Case Properties - ENTRY
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - property[0]: DENI_InsuredName
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - property[1]: DENI_InsuredName
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - property[2]: DENI_InsuredLocation
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - property[3]: DENI_InsuredEmp/InsuredStatus
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - property[4]: DENI_InsuredMaritalStatus
[6/12/19 5:47:32:910 EST] 00000849 LoggerScripta 1 >>> [Case ID:[80014848-0000-CFF3-BF14-E2C68FF8F645]] [Claim Number:P1204-001010] [Policy Number:P1204] - property[5]: DENI_InsuredMonthlyIncome

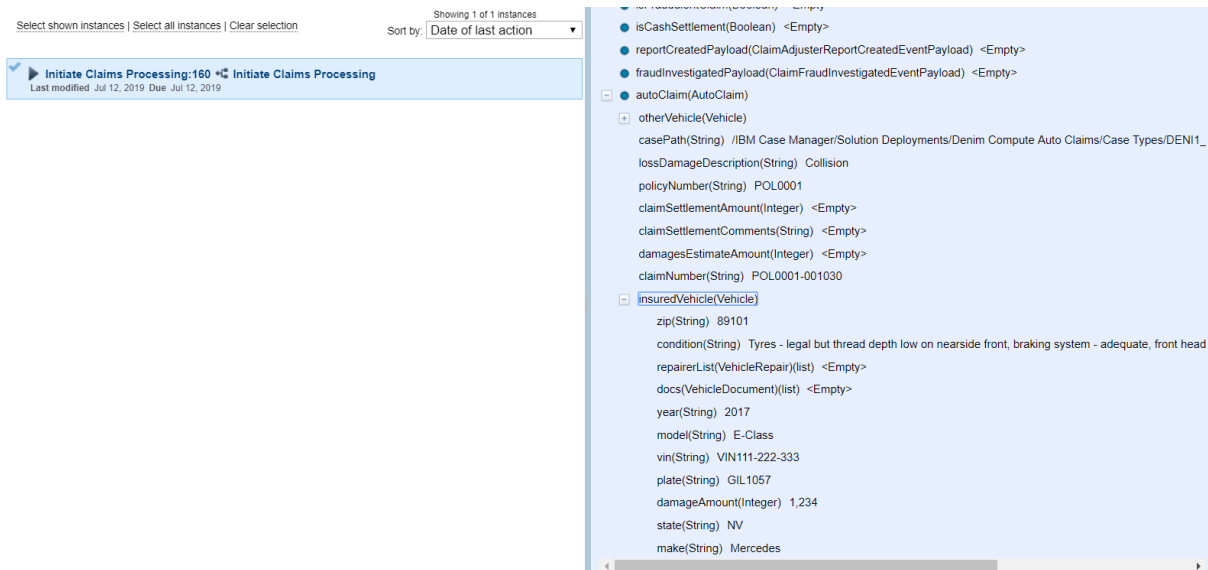
```

This is where we are now in the workflow (and the path the ODM result will take) :-

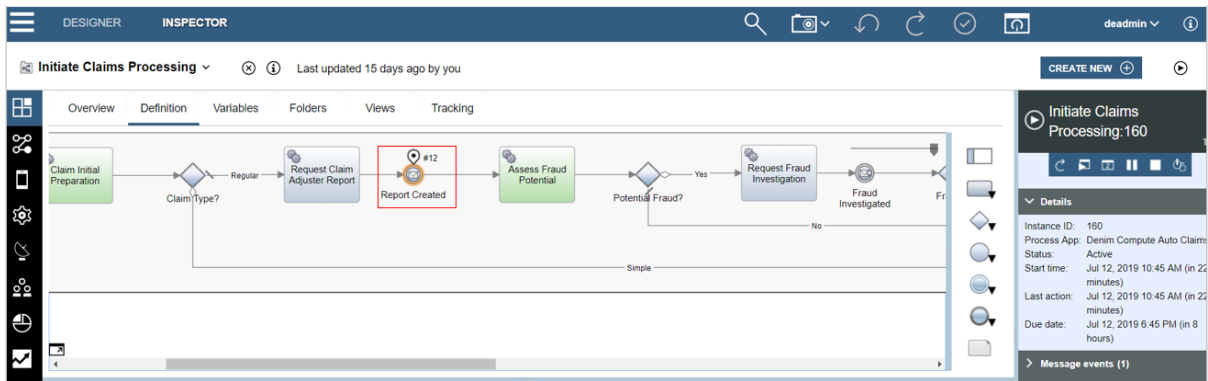


We can also inspect the long-running BPM process and especially confirm that critical data properties have been accessed from Case using the JS API and populated into ODM service interfaces – here we see the Process Inspector letting us see the instance that is running :-

And we can drill into the variables data to see the data set from data already provided (combination of Policy data passed on claim start plus the data entered in File Police Report and Gather Accident Information) :-



And we can see visually where we are inside this particular long-running process that is an implementation of a Case Activity (we are paused awaiting an inbound message event from the Case when the next activity is completed) :-



The BPM process integrates to an ODM Decision and the provided data in the case ensures that we follow the complex case type path and sets the necessary Case property in order to hand control back to a Case Activity this time for the Claim Adjuster role :-

IBM Business Automation Workflow Case Client deadmin

Cases Denim Compute Auto Claims Claim Adjuster

Cases Work

Manage Roles Add Case

Claim Adjuster (1) My Work

Filter: No filters applied Reset

Step Name	Claim Number	Policy Number	Insured LName	Subject	Time Created
Create Adjuster Report	POL0001-001030	POL0001	Formby	Create Adjuster Report	12/07/2019 10:45

The case worker can review data of interest to them from that provided already in the Case :-

Cases Work [Auto Claim Work Details V2 Create Adjuster Report](#)

Create Adjuster Report | Create Adjuster Report

Comments Complete

Claim Documents

▼ Claim

Claim Number	POL0001-001030	Policy Number	POL0001
Date Reported	12/07/2019	Policy Expiration Date	29/02/2020
Policy Effective Date	01/03/2019	Date Of Last Claim	31/12/2018
* Coverage	Premium	Policy Status	Active

▼ Insured

Insured FName	Jennie	Insured LName	Formby
Insured License Number	LIC-010101	Insured Phone	123-456-789

In order to move the workflow on we just Complete here to represent the finish of the Activity and control passing back to the long-running BPM process (normally the adjuster would file some report document detailing their findings in the Documents section) :-

Cases Work [Auto Claim Work Details V2 Create Adjuster Report](#)

Create Adjuster Report | Create Adjuster Report

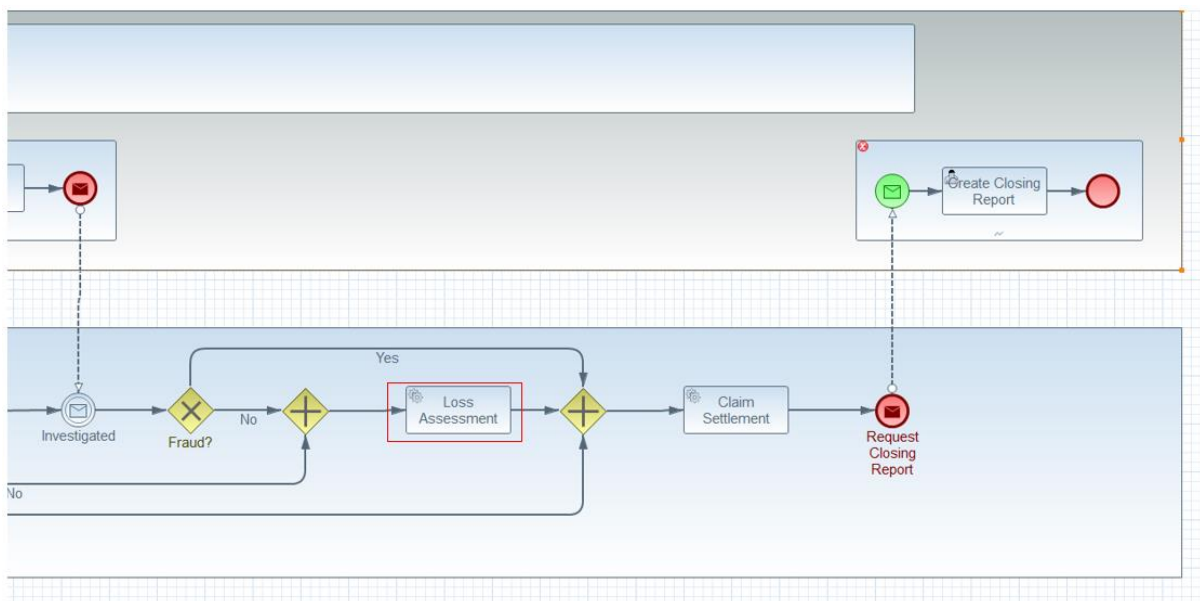
Comments View Instructions

Comments Complete Save Close

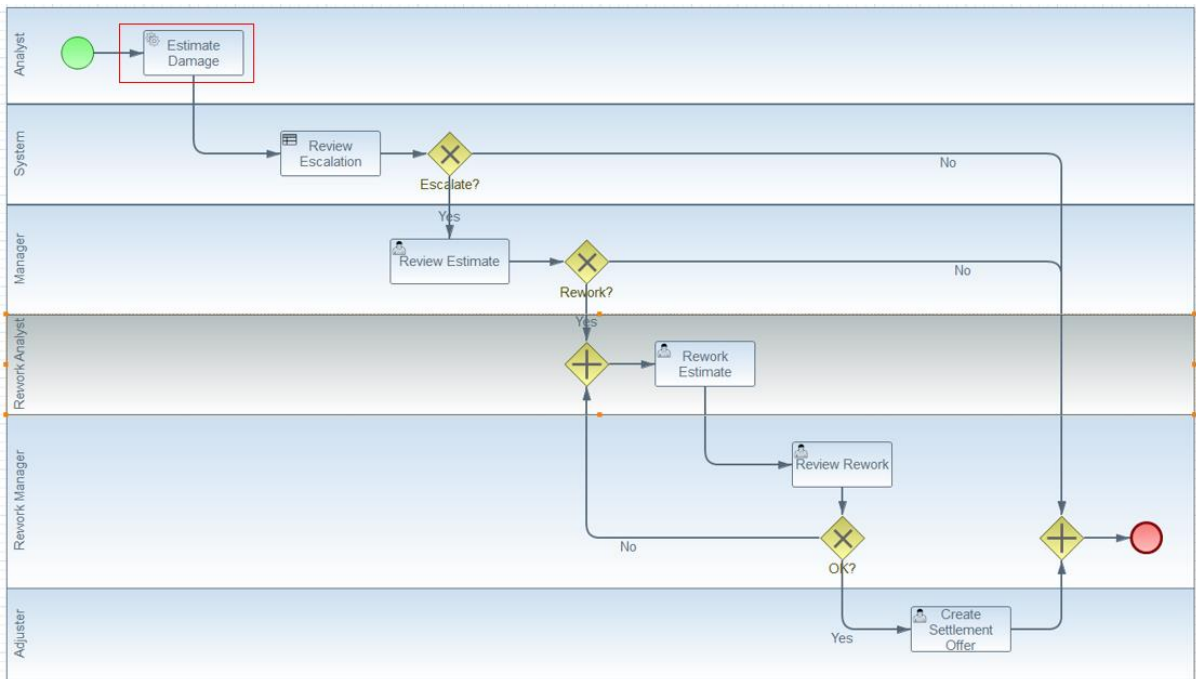
Claim Documents

▼ Claim

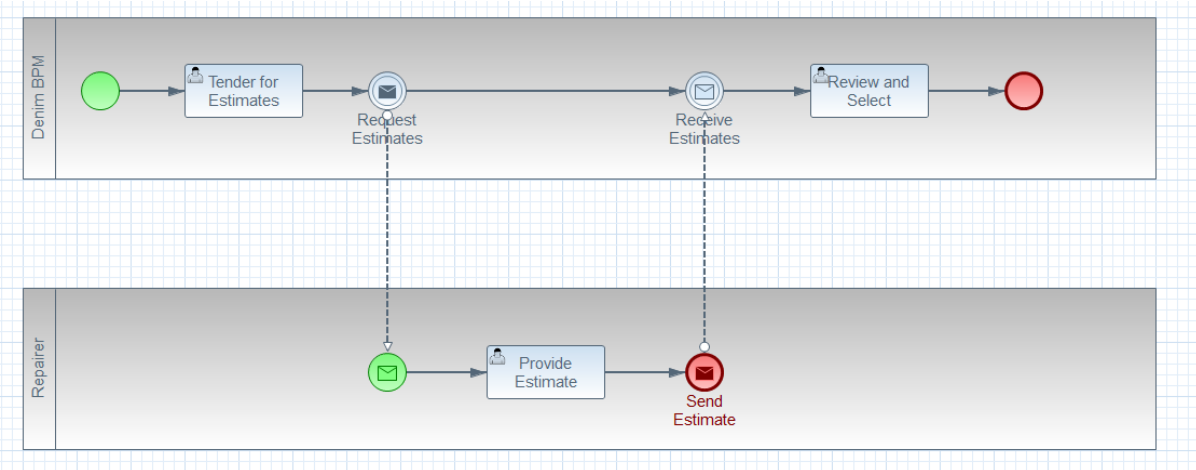
The BPM part of the workflow now calls another ODM service to assess if any Fraud (in our MVP scenario the result is that none is detected) and eventually moves on to the Loss Assessment section in the workflow :-



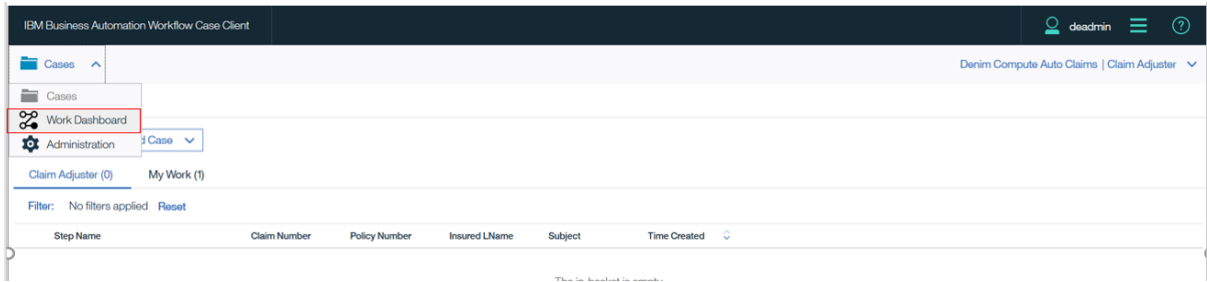
This is in turn a sub-process with the first step to Estimate Damage :-



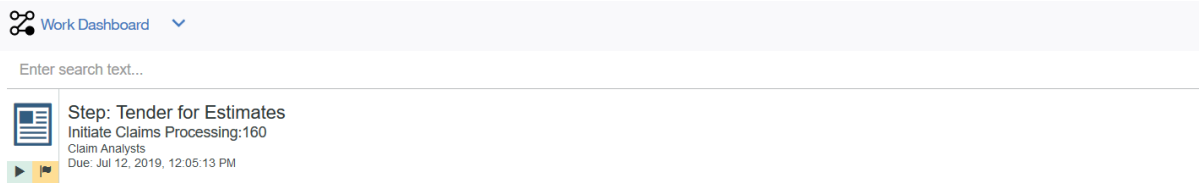
In order to Estimate Damage the logic requires a collaboration between the Claims Analyst and business partner repair shops. What happens is that the Claims Analyst identifies candidate repairers per vehicle involved and solicits estimates from them, they then each provide an estimate, and finally the Claims Analyst reviews and selects from the estimates which then builds up the total damage estimate (which the adjuster will later take as input to the settlement offer). This is represented in simplified form by this BPMN Collaboration :-



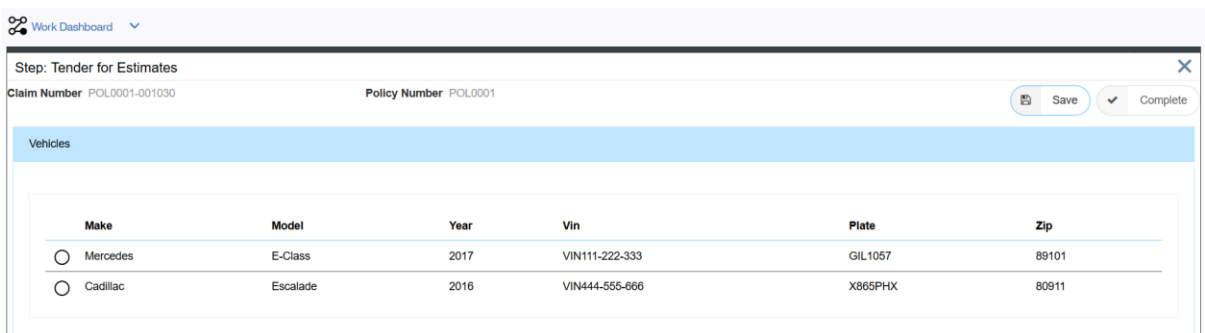
For the next set of activities we can either switch context to the Work Dashboard plugin (normally we would also log in as different user but for expediency of demo we have a power user that is a member of all roles in the scenario) or login directly to the Process Portal. Here is the Work Dashboard link :-



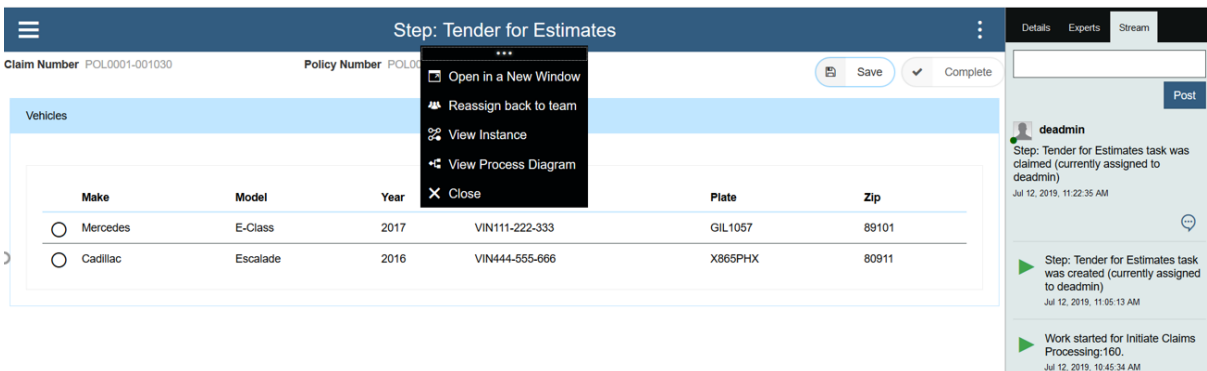
You then see the awaiting work item :-



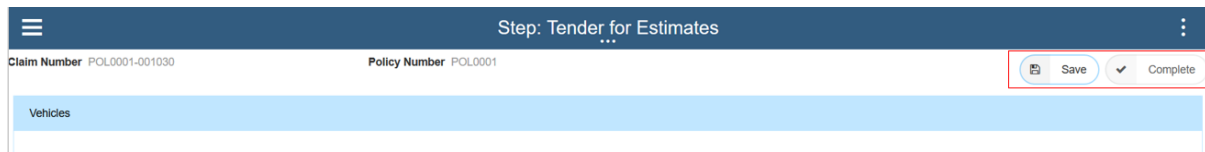
The work item details show claim summary info and the list of vehicles that have damages to be estimated :-



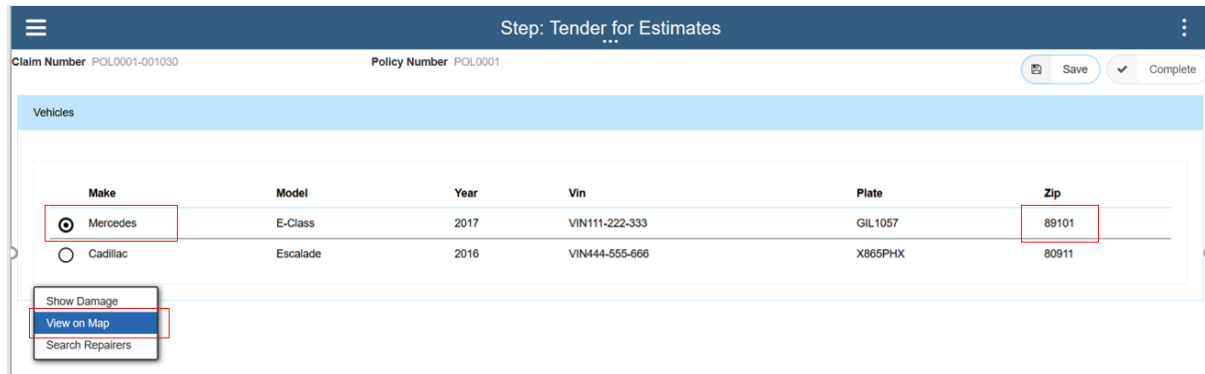
The Work Dashboard has a subset of Process Portal functionality. If we view the same work item in Process Portal we also have a set of generic actions available (such as viewing the instance) as well as collaboration features :-



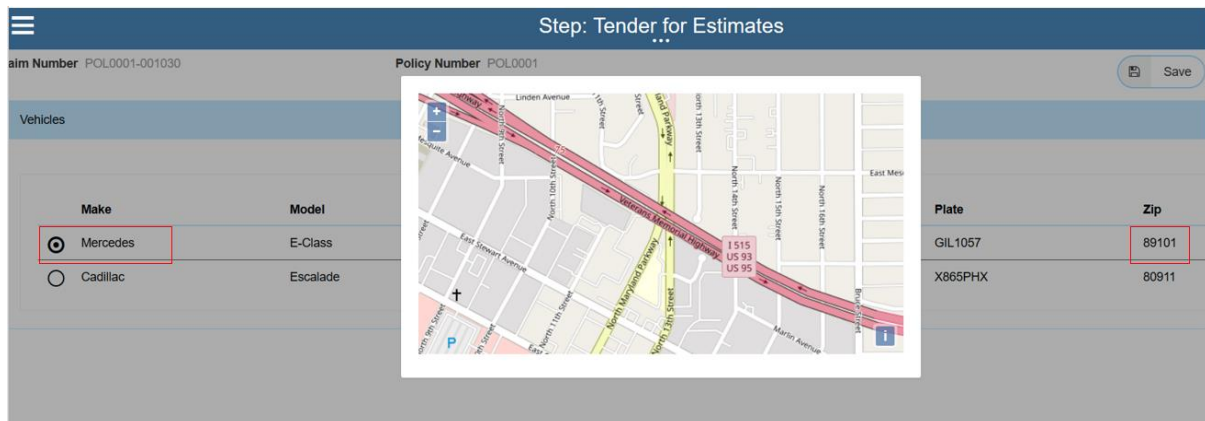
Back to this specific work item, Save is available at any time to save partial work, while Complete however has had validation built-in – here it is disabled as the necessary selection of repairers for each vehicle has not been done yet :-



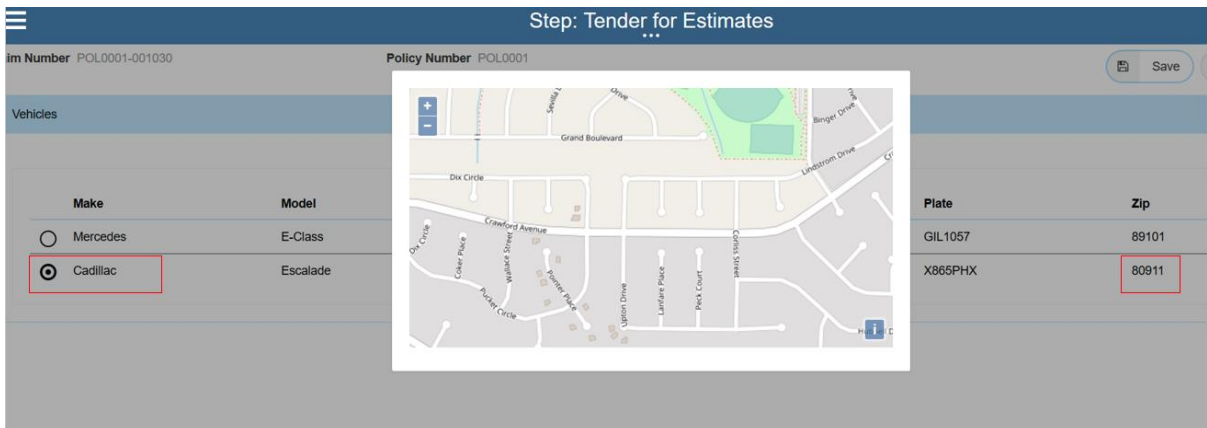
When the user selects a Vehicle from the list they get a popup menu of options :-



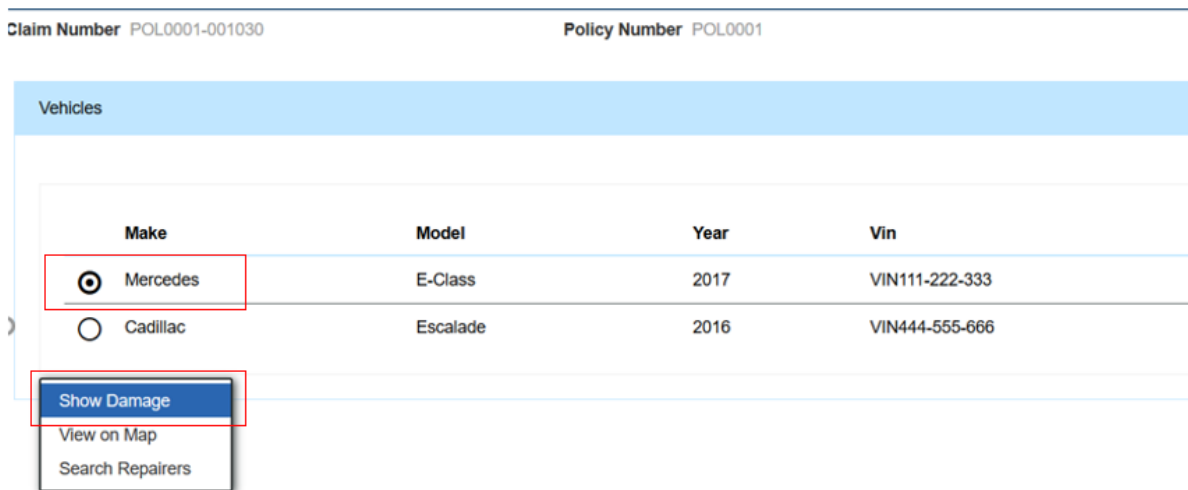
Each one of these will present a separate sub-dialog. First the view on Map – what is meant to happen here is that the ZIP of the vehicle is used to go out and find geo coordinates and then show on a map (for MVP we use a set list if mappings but this could be extended to make a REST call out to a geo finder service) :-



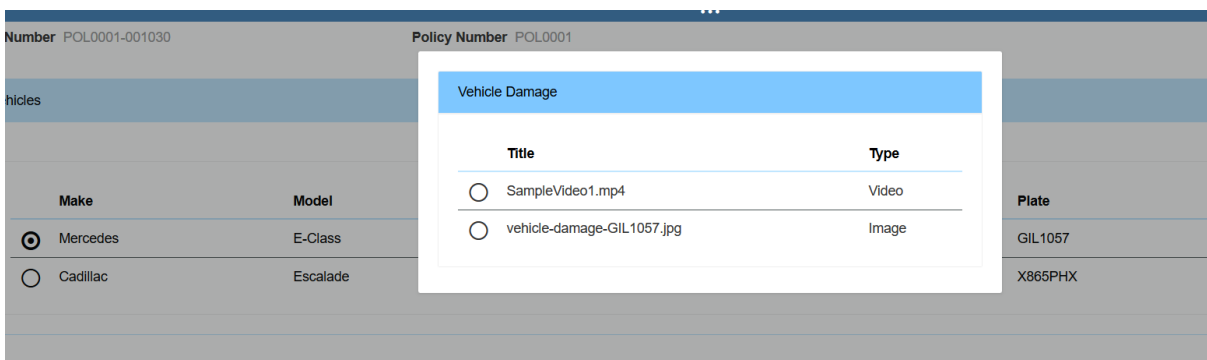
And when you select a different vehicle and again chose the Map menu option you get a different location :-



Next if we select the Show Damage menu option you get this dialog showing the list of damage documents associated with the selected vehicle (which maps back to the earlier step where the Case worker uploaded docs and specified the corresponding registration plates) :-




The ECM documents for the case are retrieved and displayed in a modal list :-



When you select from the list the document loads :-

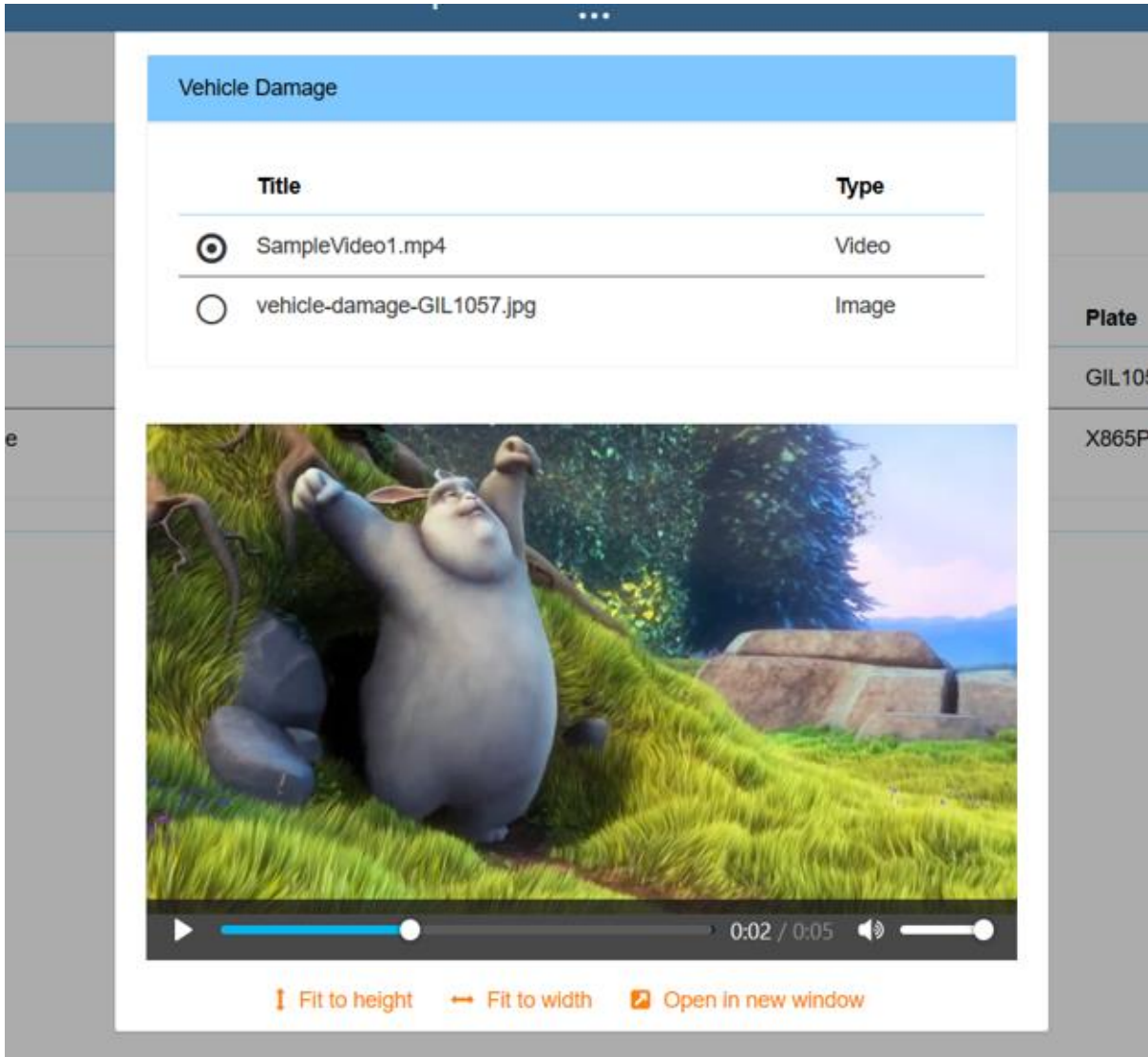
Vehicle Damage

Title	Type
<input type="radio"/> SampleVideo1.mp4	Video
<input checked="" type="radio"/> vehicle-damage-GIL1057.jpg	Image

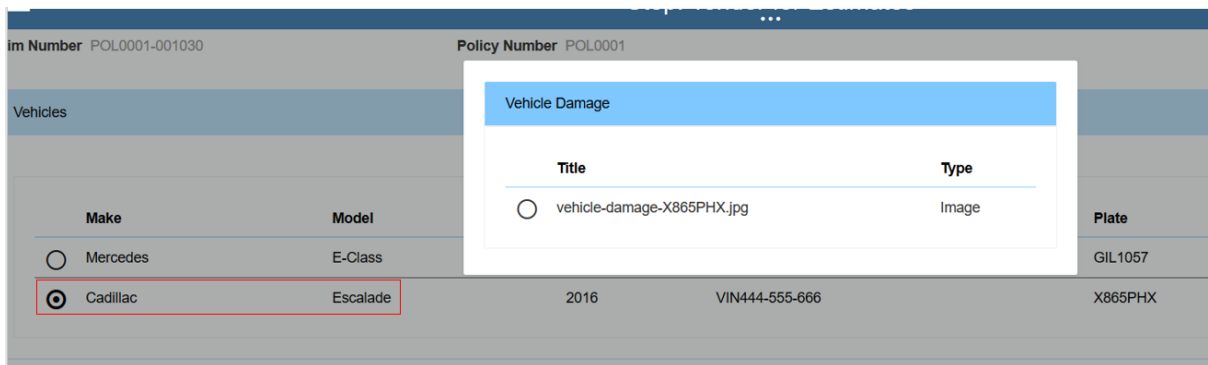


Fit to height Fit to width Open in new window

And when you choose a different document the viewer changes (in this case a sample video of a cartoon over-sized rabbit in a cave to demonstrate the control can play videos inline – I really wanted to find a suitable video here of a damaged vehicle being surveyed but could not find a free stock one) :-



If you switch to the other vehicle and again select that menu option you see a different list of documents :-



And again selecting the document renders it dynamically :-

Vehicle Damage

Title	Type
<input checked="" type="radio"/> vehicle-damage-X865PHX.jpg	Image



[↑ Fit to height](#) [↔ Fit to width](#) [🗲 Open in new window](#)

Next for each vehicle we want to choose repairers to request estimates from. So again we select the first vehicle and the menu option Search Repairers :-

Claim Number POL0001-001030

Policy Number POL0001

Vehicles

Make	Model	Year	Vin
<input checked="" type="radio"/> Mercedes	E-Class	2017	VIN111-222-333
<input type="radio"/> Cadillac	Escalade	2016	VIN444-555-666

Show Damage
View on Map
Search Repairers

... and we get a context-sensitive set of repairers in proximity to the vehicle location (note validation has been built-in to this dialogue, the buttons are not enabled until the correct selections are made) :-

The screenshot shows a dialog box titled "Available Repairers" overlaid on a vehicle selection interface. The background interface has "Mercedes" selected under "Make" and "E-Class" under "Model". The dialog box contains a table of repairers with checkboxes, an "Add Selected" button, and a "Selected Repairers" section with "Cancel" and "Confirm Selections" buttons. The "Confirm Selections" button is disabled.

Available Repairers	
<input type="checkbox"/> Name	Address
<input type="checkbox"/> Athelstan Prestige Cars	McLeod Drive, Las Vegas
<input type="checkbox"/> Flying Monk Coachworks	Hacienda Ave, Las Vegas
<input type="checkbox"/> Rose and Crown Autos	Russell Road, Las Vegas
<input type="checkbox"/> Sound Effects Garage	West Flamingo Road, Las Vegas

+ Add Selected

Selected Repairers	
Name	Address

Cancel Confirm Selections

If we were to choose the other vehicle the list of candidate repairers is different (it is based on the ZIP that we have for each vehicle) :-

The screenshot shows the same dialog box, but now "Cadillac" is selected under "Make" and "Escalade" under "Model". The table of available repairers is different, showing locations in Colorado Springs. The "Add Selected" button is now enabled. The "Confirm Selections" button remains disabled.

Available Repairers	
<input type="checkbox"/> Name	Address
<input type="checkbox"/> Alfred Bodyworks	Constitution Ave, Colorado Springs
<input type="checkbox"/> Le Tissler Fixers	East La Salle St, Colorado Springs
<input type="checkbox"/> Mary Rose AutoTech	Palmer Park Blvd, Colorado Springs

+ Add Selected

Selected Repairers	
Name	Address

Cancel Confirm Selections

Back to the insured vehicle (Mercedes), you can select one or more candidates and notice that the Add Selected becomes enabled :-

Available Repairers		
<input type="checkbox"/>	Name	Address
<input checked="" type="checkbox"/>	Athelstan Prestige Cars	McLeod Drive, Las Vegas
<input type="checkbox"/>	Flying Monk Coachworks	Hacienda Ave, Las Vegas
<input checked="" type="checkbox"/>	Rose and Crown Autos	Russell Road, Las Vegas
<input type="checkbox"/>	Sound Effects Garage	West Flamingo Road, Las Vegas

+ Add Selected

Selected Repairers	
Name	Address

× Cancel **✓** Confirm Selections

Once added if at least 2 are in the selected list then Confirm Selections also becomes enabled (plus Add Selected is disabled again until further selections are made) :-

Available Repairers

<input type="checkbox"/>	Name	Address
<input type="checkbox"/>	Athelstan Prestige Cars	McLeod Drive, Las Vegas
<input type="checkbox"/>	Flying Monk Coachworks	Hacienda Ave, Las Vegas
<input type="checkbox"/>	Rose and Crown Autos	Russell Road, Las Vegas
<input type="checkbox"/>	Sound Effects Garage	West Flamingo Road, Las Vegas

+ Add Selected

Selected Repairers

Name	Address	
Athelstan Prestige Cars	McLeod Drive, Las Vegas	✕
Rose and Crown Autos	Russell Road, Las Vegas	✕

✕ Cancel

✓ Confirm Selections

If you remove one of the selected repairers the Confirm Selections again becomes disabled :-

Available Repairers

	Name	Address
<input type="checkbox"/>	Athelstan Prestige Cars	McLeod Drive, Las Vegas
<input type="checkbox"/>	Flying Monk Coachworks	Hacienda Ave, Las Vegas
<input type="checkbox"/>	Rose and Crown Autos	Russell Road, Las Vegas
<input type="checkbox"/>	Sound Effects Garage	West Flamingo Road, Las Vegas

+ Add Selected

Selected Repairers

Name	Address	
Athelstan Prestige Cars	McLeod Drive, Las Vegas	✕

✕ Cancel
✓ Confirm Selections

If you choose to add the same item twice it will recognise this and not add it again :-

Available Repairers

<input type="checkbox"/>	Name	Address
<input checked="" type="checkbox"/>	Athelstan Prestige Cars	McLeod Drive, Las Vegas
<input checked="" type="checkbox"/>	Flying Monk Coachworks	Hacienda Ave, Las Vegas
<input type="checkbox"/>	Rose and Crown Autos	Russell Road, Las Vegas
<input type="checkbox"/>	Sound Effects Garage	West Flamingo Road, Las Vegas

+ Add Selected

Selected Repairers

Name	Address	
Athelstan Prestige Cars	McLeod Drive, Las Vegas	<input type="checkbox"/>

✕ Cancel

✓ Confirm Selections

Available Repairers

<input type="checkbox"/>	Name	Address
<input type="checkbox"/>	Athelstan Prestige Cars	McLeod Drive, Las Vegas
<input type="checkbox"/>	Flying Monk Coachworks	Hacienda Ave, Las Vegas
<input type="checkbox"/>	Rose and Crown Autos	Russell Road, Las Vegas
<input type="checkbox"/>	Sound Effects Garage	West Flamingo Road, Las Vegas

+ Add Selected

Selected Repairers

Name	Address	
Athelstan Prestige Cars	McLeod Drive, Las Vegas	✕
Flying Monk Coachworks	Hacienda Ave, Las Vegas	✕

✕ Cancel
✔ Confirm Selections

Now you can Confirm Selections and these items are saved for the chosen vehicle.

At this point Complete is still not enabled as you have not assigned candidate repairers to the other vehicle :-

☰
⋮
Step: Tender for Estimates

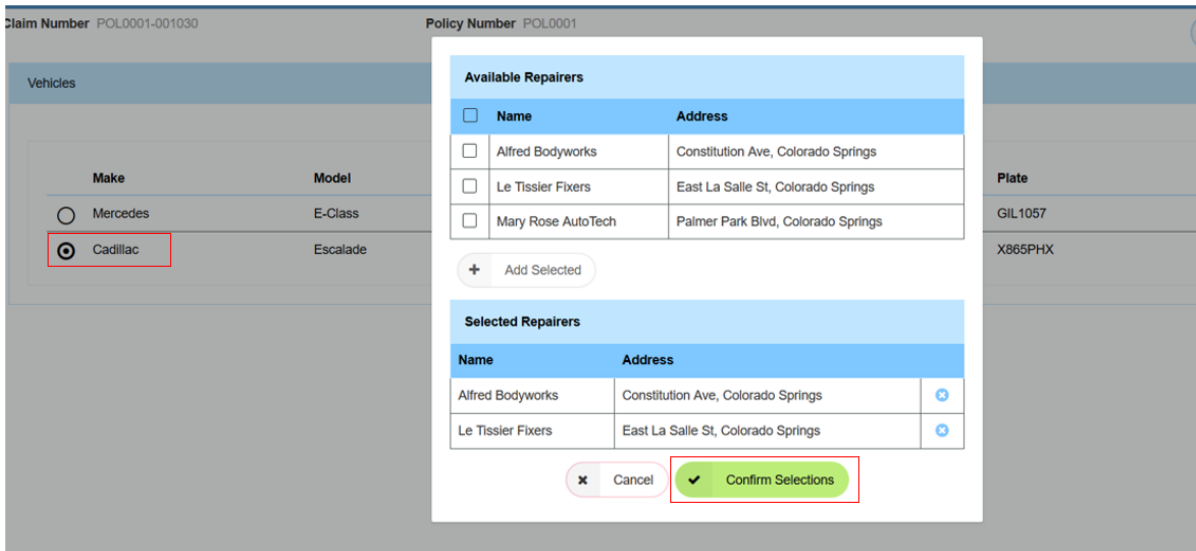
Claim Number POL0001-001030
Policy Number POL0001

📄 Save
✔ Complete

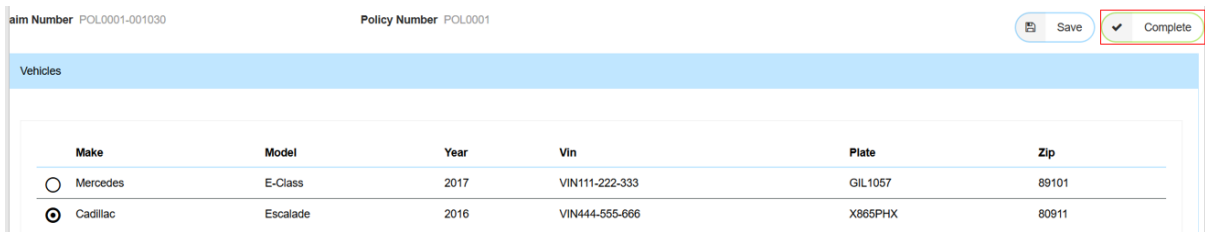
Vehicles

	Make	Model	Year	Vin	Plate	Zip
<input checked="" type="radio"/>	Mercedes	E-Class	2017	VIN111-222-333	GIL1057	89101
<input type="radio"/>	Cadillac	Escalade	2016	VIN444-555-666	X865PHX	80911

So that is done next for the other Vehicle (Cadillac) :-

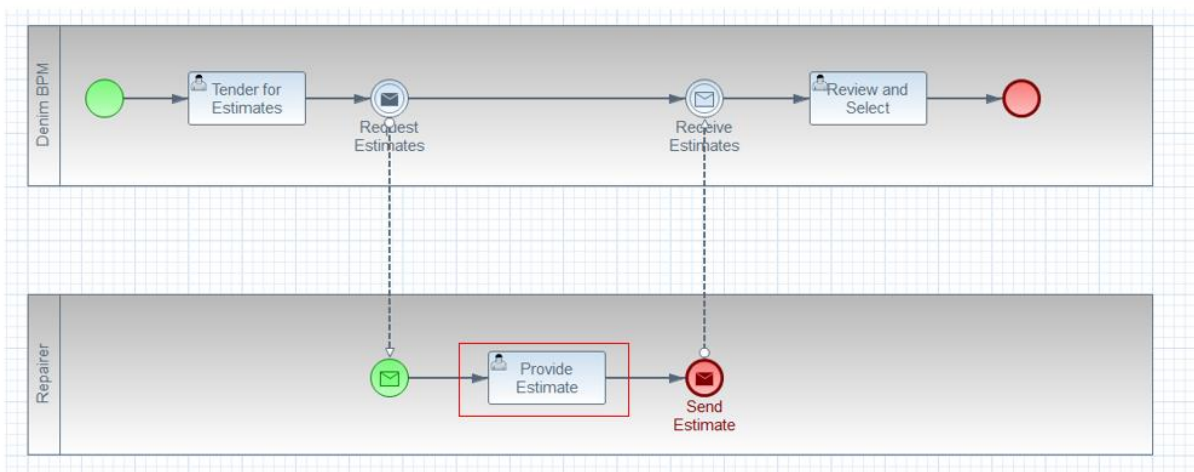


Now the Complete button becomes enabled and the user Completes the work item :-



(Note: If the user relaunches the dialogue for vehicle repairers for a specific vehicle at any point it remembers their previous selections and they can change them if needed prior to completing.)

What happens now is that these chosen repairers are each sent a request to provide an estimate for the respective vehicles, logically this part of the workflow :-



We are going to show that they are a business partner that also has access to BAW (though typically they would be using different credentials) and we will “skin” the UI pages differently to show they are an outside party. Each repairer (there were 4 chosen) would log in individually and see only their work item. For demo expedience it is easier to not have to switch users so our “power” user can see and interact with all of the items that now show up in Process Portal (note the subjects match to the selected cars / garages in the previous activity) :-

deadmin
Edit Profile Log Out

Work

Enter search text...

- Athelstan Prestige Cars - Provide Estimate for Mercedes E-Class
Provide Repair Estimates:145
Vehicle Repairer
Due: Jul 12, 2019, 1:48:35 PM
- Flying Monk Coachworks - Provide Estimate for Mercedes E-Class
Provide Repair Estimates:145
Vehicle Repairer
Due: Jul 12, 2019, 1:48:35 PM
- Alfred Bodyworks - Provide Estimate for Cadillac Escalade
Provide Repair Estimates:145
Vehicle Repairer
Due: Jul 12, 2019, 1:48:35 PM
- Le Tissier Fixers - Provide Estimate for Cadillac Escalade
Provide Repair Estimates:145
Vehicle Repairer
Due: Jul 12, 2019, 1:48:35 PM

We have to complete each of the 4 work item tasks before the process returns to the Claim Analyst. Let's walkthrough one of them first. The Coach shows the Vehicle summary along with a Repair Estimate section and various buttons (in common with the previous Coach we have validation to prevent Complete being enabled – this time the logic is that there must be at least one part specified plus the labor cost and tax should be valid values) :-

Athelstan Prestige Cars - Provide Estimate for Mercedes E-Class

Claim Number POL0001-001030 Policy Number POL0001

Save Complete

Vehicle for Repair

Make	Mercedes	Model	E-Class
Plate	GIL1057	State	NV
Zip	89101	Year	2017
VIN	VIN111-222-333		

Check History View Damage

Repair Estimate

Labor Cost	Tax Percentage	Total Estimate
0.00	0	0.00

Parts

SKU	Description	Quantity	Unit Price
Search and Add Part View Diagram			

Starting with the contextual buttons under Vehicle, the View Damage reuses functionality already seen to let the repairer see the level of damage done :-

Athelstan Prestige Cars - Provide Estimate for Mercedes E-Class

Claim Number POL0001-001030 Policy Number POL0001

Vehicle for Repair

Make	Mercedes	Model	E-Class
Plate	GIL1057	State	NV
Zip	89101	Year	2017
VIN	VIN111-222-333		

Vehicle Damage

Title	Type
<input type="radio"/> SampleVideo1.mp4	Video
<input checked="" type="radio"/> vehicle-damage-GIL1057.jpg	Image

Next Check History uses the VIN to simulate going out to some vehicle records service (normally a government department) as the repairer wants to check any previous accident history etc for the vehicle as that will effect the likely complexity of their repair work :-

Athelstan Prestige Cars - Provide Estimate for M

Claim Number POL0001-001030 Policy Number POL0001

Vehicle for Repair

Make	Mercedes	Model	E-Class
Plate	GIL1057	State	NV
Zip	89101	Year	2017
VIN	VIN111-222-333		

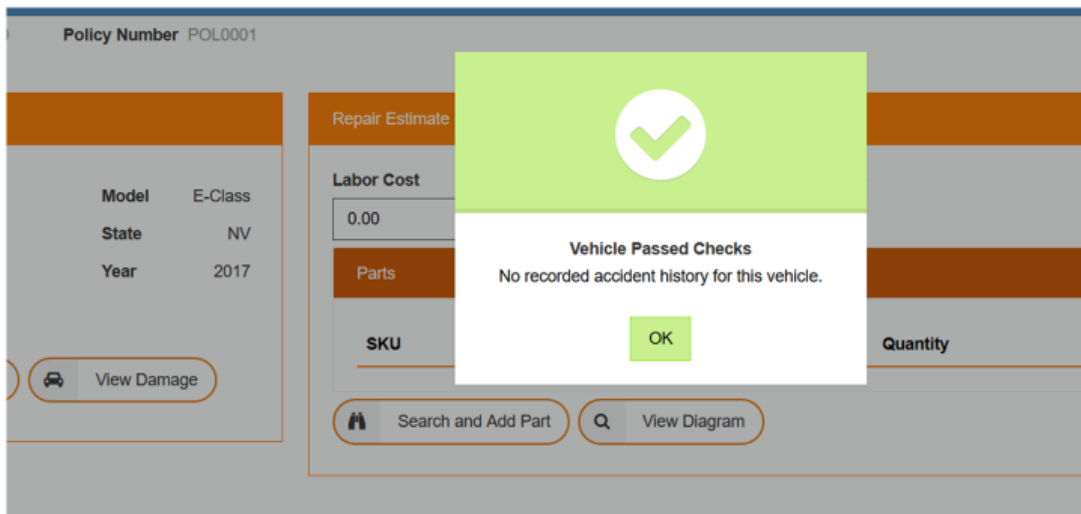
Repair Estimate

Labor Cost	Tax Percentage	Total Estimate
0.00	0	0.00

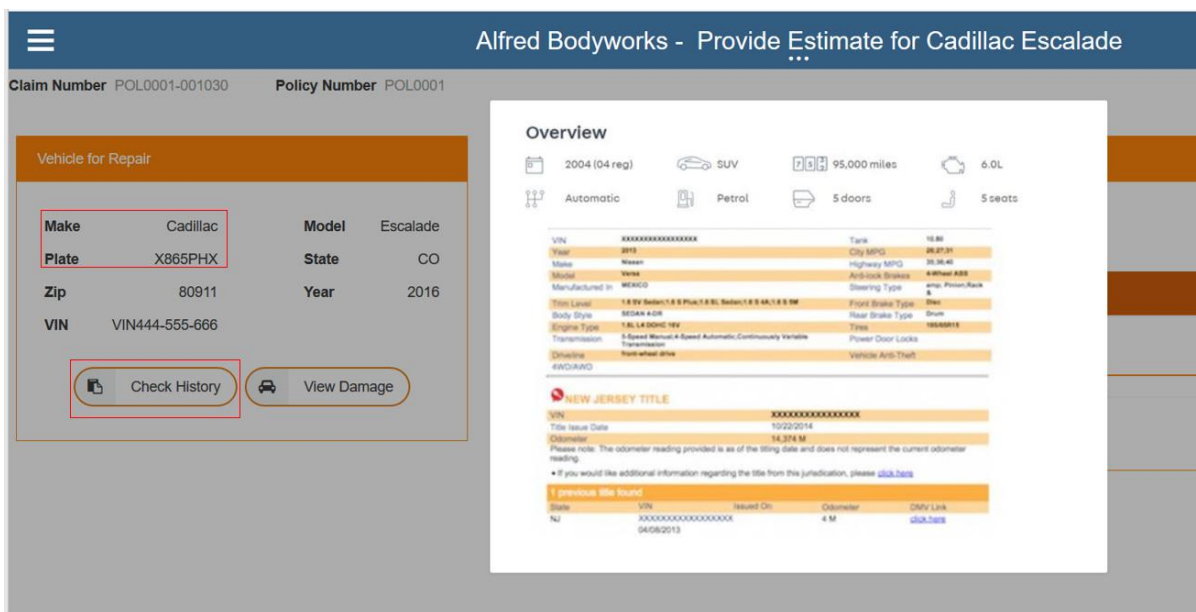
Parts

SKU	Description
<input type="button" value="Search and Add Part"/> <input type="button" value="View Diagram"/>	

This particular vehicle comes back with a clean bill of (previous) health :-



If we switch to the other work items for the other vehicle with a different VIN this time it comes back that the vehicle history has found some previous incidents of relevance :-



(Note the implementation here for demo purposes use a static image stored and matched to the Vehicle VIN).

So next moving on to the repair estimate, we can imagine that the repairer needs to familiarise themselves with the particular vehicle make, model, and variation so View Diagram might present them with a contextual parts breakdown (again for the demo implementation this is using a static image and in this scenario it is not specific to the vehicle) :-

Claim Number POL0001-001030 Policy Number POL0001

Vehicle for Repair

Make	Mercedes	Model	E-Class
Plate	GIL1057	State	NV
Zip	89101	Year	2017
VIN	VIN111-222-333		

Repair Estimate

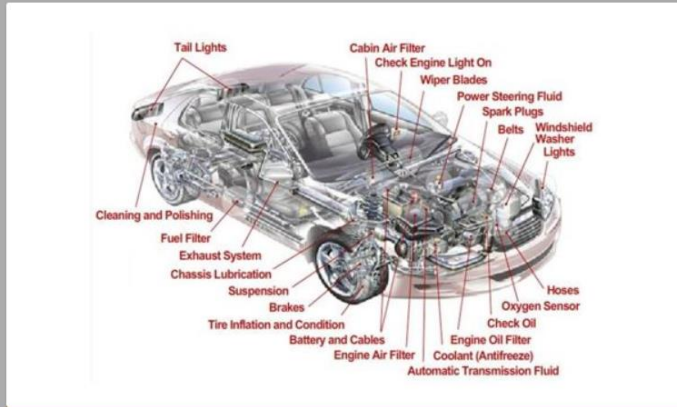
Labor Cost	Tax Percentage	Total Estimate
0.00	0	0.00

Parts

SKU	Description	Quantity
-----	-------------	----------

Policy Number POL0001

Model	E-Class
State	NV
Year	2017



Unit Price

So now on to the main data entry for this item (as we shall see the data entry is minimal as we use dynamic lookups). So staying with the Mercedes vehicle let's launch the dialogue to search for parts :-

Claim Number POL0001-001030 Policy Number POL0001

Vehicle for Repair

Make	Mercedes	Model	E-Class
Plate	GIL1057	State	NV
Zip	89101	Year	2017
VIN	VIN111-222-333		

Repair Estimate

Labor Cost	Tax Percentage	Total Estimate
0.00	0	0.00

Parts

SKU	Description	Quantity	U
-----	-------------	----------	---

We are presented with a popup dialogue :-

The screenshot shows a form with the following elements:

- * SKU**: A search input field with a magnifying glass icon.
- * Description**: A search input field with a magnifying glass icon.
- Unit Price**: A numeric input field with a currency symbol icon.
- * Quantity**: A numeric input field with a tag icon.
- Buttons**: Two buttons at the bottom: "Cancel Add" (with a red 'x' icon) and "Add Part" (with a green checkmark icon).

If the user were to attempt to Add Part without completing the fields they get validation errors :-

The screenshot shows the same form as above, but with validation errors:

- The *** SKU** field has a red border and a tooltip that says "Please select a part SKU".
- The *** Description** field has a red border and an asterisk icon.
- The *** Quantity** field has a red border and an asterisk icon.
- The **Unit Price** field is empty and has no border.
- The **Buttons** remain the same: "Cancel Add" and "Add Part".

The parts dialogue is contextual to the vehicle (in this case Mercedes) – so you start typing the SKU code “merc...” and it presents a picklist :-

* SKU

merc

MERC1111

MERC22222

MERC33333

MERC4444

* Quantity

Cancel Add Add Part

And when you select from the picklist it prefills in the fields based on that part's catalog entry :-

* SKU

MERC1111

* Description

Headlamp (front)

Unit Price

150.00

* Quantity

Cancel Add Add Part

The repairer can also search on description if they don't know the SKU :-

* SKU

* Description

* Quantity

Cancel Add Add Part

There is also validation on Add Part that the part's quantity matches the catalog stipulations :-

* SKU

MERC1111

* Description

Headlamp (front)

Unit Price

150.00

* Maximum quantity is 2

3

Cancel Add Add Part

After fixing issues and adding the parts list is updated and the running total calculated (but note that Complete is not yet enabled as labor cost and tax need non-zero values) :-

Athelstan Prestige Cars - Provide Estimate for Mercedes E-Class

Policy Number POL0001

Save Complete

Repair Estimate

Labor Cost	Tax Percentage	Total Estimate
0.00	0	300.00

Parts

SKU	Description	Quantity	Unit Price	
MERC11111	Headlamp (front)	2	150	Edit Delete

View Damage

Search and Add Part View Diagram

The Edit and Delete buttons on the row allow for deleting or editing the part. Here is an example of the Edit dialogue (Cancel Edit will not commit any changes while Save Changes will update the part item in the Parts list) :-

Policy Number POL0001

E-Class NV 2017

View Damage

Search and Add Part View Diagram

Edit Delete

* SKU

MERC11111

* Description

Headlamp (front)

Unit Price

150.00

* Quantity

2

Cancel Edit Save Changes

If the repairer provides a labor cost and or tax the total is again dynamically re-calculated :-

Athelstan Prestige Cars - Provide Estimate for Mercedes E-Class

Policy Number POL0001

Save Complete

Repair Estimate

Labor Cost	Tax Percentage	Total Estimate
250.00	15	632.50

Parts

SKU	Description	Quantity	Unit Price	
MERC11111	Headlamp (front)	2	150	Edit Delete

View Damage

Search and Add Part View Diagram

After adding some more same parts the finished estimate for this repairer looks like this (and Complete is enabled) :-

User Completes the work item and the Process Portal refreshes to show the 3 remaining work items :-

The other estimates are provided in a similar way, the only other difference to note is that the parts catalog matches the Cadillac vehicle :-

We action the other work items in a similar way, the below screenshots show the final settings before complete in each case :-

Flying Monk Coachworks - Provide Estimate for Mercedes E-Class

Claim Number POL0001-001030 Policy Number POL0001

Save Complete

Vehicle for Repair

Make	Mercedes	Model	E-Class
Plate	GIL1057	State	NV
Zip	89101	Year	2017
VIN	VIN111-222-333		

Repair Estimate

Labor Cost	Tax Percentage	Total Estimate
335.00	12	1006.32

Parts

SKU	Description	Quantity	Unit Price		
MERC11111	Headlamp (front)	1	150	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
MERC22222	Grill assembly	1	389	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
MERC44444	Fastening bolts	50	0.49	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

Le Tissier Fixers - Provide Estimate for Cadillac Escalade

Claim Number POL0001-001030 Policy Number POL0001

Save Complete

Vehicle for Repair

Make	Cadillac	Model	Escalade
Plate	X865PHX	State	CO
Zip	80911	Year	2016
VIN	VIN444-555-666		

Repair Estimate

Labor Cost	Tax Percentage	Total Estimate
450.00	10	1252.90

Parts

SKU	Description	Quantity	Unit Price		
CADY11111	Taillight (back)	2	150	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
CADY22222	Bumper assembly	1	389	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

Alfred Bodyworks - Provide Estimate for Cadillac Escalade

Claim Number POL0001-001030 Policy Number POL0001

Save Complete

Vehicle for Repair

Make	Cadillac	Model	Escalade
Plate	X865PHX	State	CO
Zip	80911	Year	2016
VIN	VIN444-555-666		

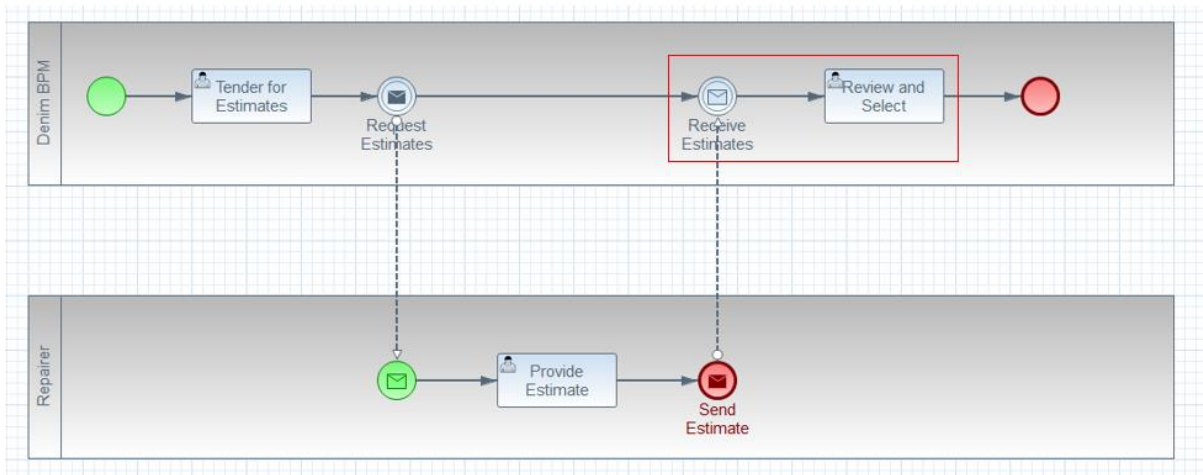
Repair Estimate

Labor Cost	Tax Percentage	Total Estimate
750.00	20	1966.80

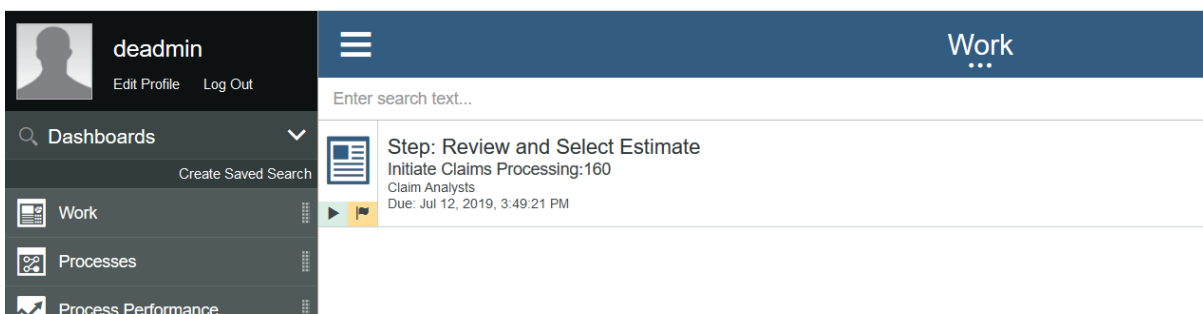
Parts

SKU	Description	Quantity	Unit Price		
CADY11111	Taillight (back)	1	150	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
CADY22222	Bumper assembly	1	389	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
CADY55555	Rear windshield	1	350	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

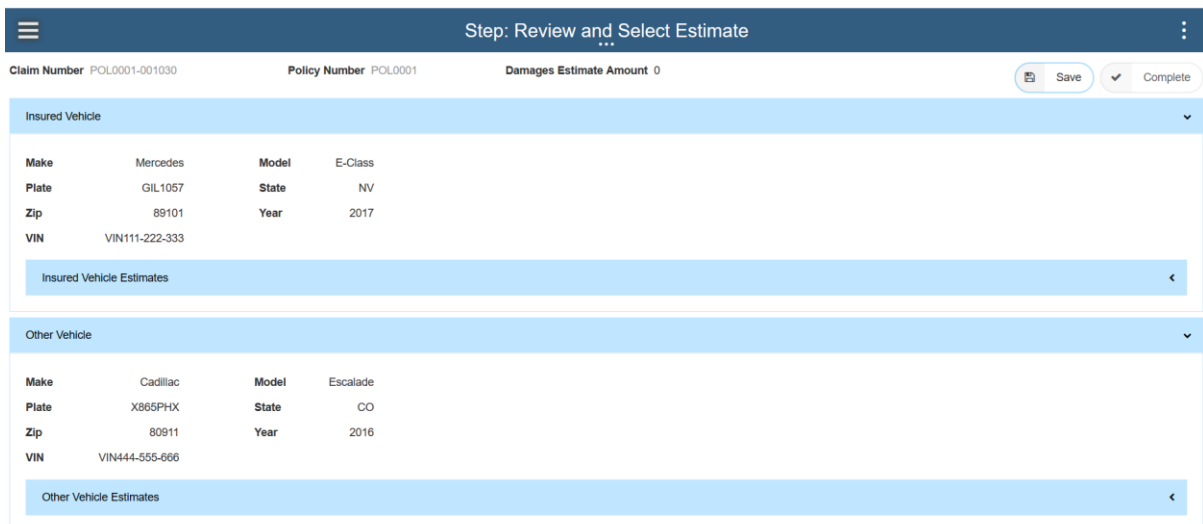
Once they are all done the process representing the gathering of business partner repair estimates hands control back as depicted here :-



A work item appears to Review and Select Estimate :-



The work item Coach shows summary data and sections for the Vehicles (Complete is disabled until a preferred estimate is selected from the repairers estimates for each vehicle) :-



The user opens up the Insured Vehicle and sees the estimates breakdown :-

Insured Vehicle Estimates							
Repairers							
Name	Total Cost	Labor Cost	Tax Percentage	Parts List			
				Sku	Description	Quantity	Unit Price
<input type="radio"/> Athelstan Prestige Cars	1948.1	250	15	MERC11111	Headlamp (front)	2	150
				MERC22222	Grill assembly	1	389
				MERC33333	Hood / bonnet	1	755
<input type="radio"/> Flying Monk Coachworks	1006.32	335	12	MERC11111	Headlamp (front)	1	150
				MERC22222	Grill assembly	1	389
				MERC44444	Fastening bolts	50	0.49

When they select one as the preferred estimate the running total of damages is calculated (but Complete is not yet enabled) :-

☰ Step: Review and Select Estimate

Claim Number POL0001-001030 Policy Number POL0001 Damages Estimate Amount 1948 Save Complete

Insured Vehicle

Make Mercedes Model E-Class
 Plate GIL1057 State NV
 Zip 89101 Year 2017
 VIN VIN111-222-333

Insured Vehicle Estimates

Repairers							
Name	Total Cost	Labor Cost	Tax Percentage	Parts List			
				Sku	Description	Quantity	Unit Price
<input checked="" type="radio"/> Athelstan Prestige Cars	1948.1	250	15	MERC11111	Headlamp (front)	2	150
				MERC22222	Grill assembly	1	389
				MERC33333	Hood / bonnet	1	755

They repeat for the other vehicle, first viewing the estimates :-

Make	Cadillac	Model	Escalade
Plate	X865PHX	State	CO
Zip	80911	Year	2016
VIN	VIN444-555-666		

Other Vehicle Estimates							
Repairers							
Name	Total Cost	Labor Cost	Tax Percentage	Parts List			
				Sku	Description	Quantity	Unit Price
<input type="radio"/> Alfred Bodyworks	1966.8	750	20	CADY11111	Taillight (back)	1	150
				CADY22222	Bumper assembly	1	389
				CADY55555	Rear windshield	1	350
<input type="radio"/> Le Tissier Fixers	1252.9	450	10	CADY11111	Taillight (back)	2	150
				CADY22222	Bumper assembly	1	389

Then selecting the preferred one :-

Step: Create Settlement Offer

Claim Number POL0001-001030 Policy Number POL0001 Damages Estimate Amount 3201

Save Complete

Insured Vehicle			Other Vehicle		
Make	Mercedes	Model	E-Class	Plate	GIL1057
Assessed Condition	Tyres - legal but thread depth low on nearside front, braking system - adequate, front headlamp defective, hood showing excessive signs of wear				
Damage Amount	1,948	Adjustment Factor	100%	Adjusted Amount	1,948

Other Vehicle					
Make	Cadillac	Model	Escalade	Plate	X865PHX
Assessed Condition	Tyres - legal with adequate thread depth, braking system - adequate, vehicle overall condition good with no defects detected				
Damage Amount	1,253	Adjustment Factor	100%	Adjusted Amount	1,253

Claim Settlement

* Policy Mandatory Excess Policy Voluntary Excess Claim Settlement Amount * Cash Settlement?

0 0 3,201

* Claim Settlement Comments

The Adjuster considers the information (in reality they would also access case documents here to review the report, polict report, etc) and in this case they decide to reduce the payout for the insured vehicle due to issues with the existing condition it was in at the time of the accident. When they change the Adjustment Factor percentage the Adjusted Amount and Claim Settlement Amount fields are automatically recalculated :-

Step: Create Settlement Offer

Claim Number POL0001-001030 Policy Number POL0001 Damages Estimate Amount 3201

Insured Vehicle			Other Vehicle		
Make	Mercedes	Model	E-Class	Plate	GIL1057
Assessed Condition	Tyres - legal but thread depth low on nearside front, braking system - adequate, front headlamp defective, hood showing excessive signs of wear				
Damage Amount	1,948	Adjustment Factor	80%	Adjusted Amount	1,558

Other Vehicle					
Make	Cadillac	Model	Escalade	Plate	X865PHX
Assessed Condition	Tyres - legal with adequate thread depth, braking system - adequate, vehicle overall condition good with no defects detected				
Damage Amount	1,253	Adjustment Factor		Adjusted Amount	

Claim Settlement

* Policy Mandatory Excess Policy Voluntary Excess Claim Settlement Amount * Cash Settlement?

0 0 2,811

* Claim Settlement Comments

Note there is also built-in validation in these fields, here is an example of what happens when you try to provide an invalid percentage :-

Insured Vehicle			Other Vehicle
Make Mercedes	Model E-Class	Plate GIL1057	Make Cadillac
Assessed Condition Tyres - legal but thread depth low on nearside front, braking system - adequate, front headlamp defective, hood showing excessive signs of wear			Assessed Condition
Damage Amount 1,948	Adjustment Factor 110%	Adjusted Amount 2,143	Damage Amount
Claim Settlement			

The Adjuster then completes the Claim Settlement section which in turn then enables the Complete button so they can click that to finish :-

Step: Create Settlement Offer

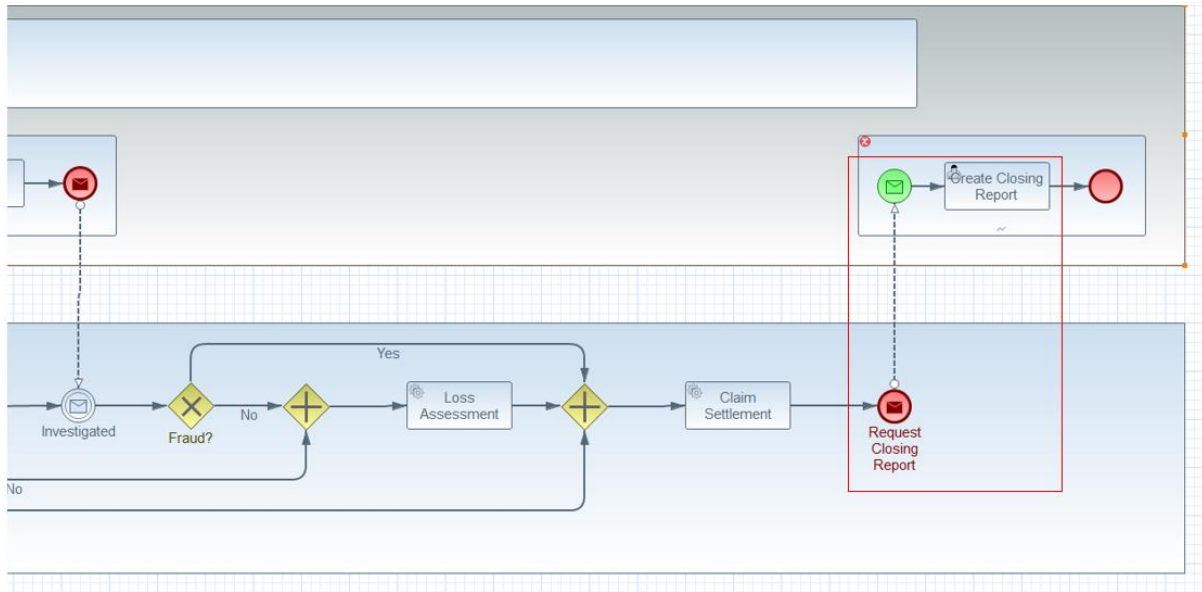
Claim Number POL0001-001030 Policy Number POL0001 Damages Estimate Amount 3201 Save Complete

Insured Vehicle			Other Vehicle		
Make Mercedes	Model E-Class	Plate GIL1057	Make Cadillac	Model Escalade	Plate X865PHX
Assessed Condition Tyres - legal but thread depth low on nearside front, braking system - adequate, front headlamp defective, hood showing excessive signs of wear			Assessed Condition Tyres - legal with adequate thread depth, braking system - adequate, vehicle overall condition good with no defects detected		
Damage Amount 1,948	Adjustment Factor 80%	Adjusted Amount 1,558	Damage Amount 1,253	Adjustment Factor 100%	Adjusted Amount 1,253
Claim Settlement					
* Policy Mandatory Excess		Policy Voluntary Excess		* Claim Settlement Amount	
250		100		2,461	
<input checked="" type="checkbox"/> Cash Settlement?					
* Claim Settlement Comments					
Insured vehicle adjusted based on existing condition, therefore full repair costs not covered in that case					

BPM long-running process now completes and hands control back to a final Case Activity for the Claim Adjuster to Create Closing Report :-

IBM Business Automation Workflow Case Client					
Cases					
Denim Compute Auto Claims Claim Adjuster					
Cases Work					
Manage Roles Add Case					
Claim Adjuster (1) My Work					
Filter: No filters applied Reset					
Step Name	Claim Number	Policy Number	Insured LName	Subject	Time Created
Create Closing Report	POL0001-001030	POL0001	Formby	Create Closing Report	12/07/2019 16:01

We are now here in the overall workflow :-



We can see the data for the Case so far (including key data updates provided as a summary of all the previous steps in BPM) :-

Cases Work [Auto Claim Work Details V2 Create Closing Report](#)

Claim Documents

Claim

Claim Number	POL0001-001030	Claim Status	
Date Reported	12/07/2019	Policy Number	POL0001
Policy Effective Date	01/03/2019	Policy Expiration Date	29/02/2020
* Coverage	Premium	Date Of Last Claim	31/12/2018
Claim Outcome		Policy Status	Active
* Damage Amount	3,201	* Monthly Premium	99
		* Claim Settlement Amount	2,461

Claim Settlement Comments
Insured vehicle adjusted based on existing condition, therefore full repair costs not covered in that case

Also if you look at the documents you will see that a generated file has been added to the Case, this represents the complex data structures that were processed in all of the previous steps but are not stored on the Case itself due to restrictions in the data model of Case :-

Create Closing Report | Create Closing Report

Comments

Claim Documents

Documents Activities History

Add

Add Document Set Property

Actions

Home

Name	Modified By	Modified On
Adjuster Report	deadadmin	16/07/2019 12:54
Damages Evidence	deadadmin	16/07/2019 12:54
Police Accident Report	deadadmin	16/07/2019 12:54
Repair Estimates and Invoices	deadadmin	16/07/2019 12:54
autoClaim.json	deadadmin	16/07/2019 13:17

Here we show this file opened and formatted with a Sublime Text JSON plugin :-

```
1 {
2   "claimNumber": "POL0001-001000",
3   "policyNumber": "POL0001",
4   "lossDamageDescription": "Collision",
5   "damagesEstimateAmount": 3201,
6   "claimSettlementAmount": 2461,
7   "claimSettlementComments": "Insured vehicle repair adjusted to take into account adverse condition",
8   "insuredVehicle": {
9     "make": "Mercedes",
10    "model": "E-Class",
11    "year": "2017",
12    "vin": "VIN111-222-333",
13    "plate": "GIL1057",
14    "state": "NV",
15    "zip": "89101",
16    "condition": "Tyres - legal but thread depth low on nearside front, braking system - adequate, offside front headlamp defective, hood showing excessive signs of v
17    "damageAmount": 1948,
18    "repairerList": [
19      {
20        "repairerCode": "AthePres1",
21        "repairerName": "AthePres1",
22        "isSelectedRepairer": true,
23        "laborCost": 250,
24        "taxPercentage": 15,
25        "totalCost": 1948.1,
26        "partsList": [
27          {
28            "sku": "MERC11111",
29            "description": "Headlamp (front)",
30            "quantity": 2,
31            "maxQuantity": 2,
32            "quantityUnits": 1,
33            "unitPrice": 150
34          },
35          {
36            "sku": "MERC22222",
37            "description": "Grill assembly",
38            "quantity": 1,
39            "maxQuantity": 1,
40            "quantityUnits": 1,
41            "unitPrice": 389
42          },
43          {
44            "sku": "MERC33333",
```

By storing this file we now have core BPM process data stored with the Case and can be available long after the instance has completed according to whatever retention policies have been configured in ECM.

Back in the work item data entry tab, provide a Claim Outcome and then just Complete to emulate that work getting done (in reality there might be some PDF report that the Adjuster provides and uploads to the case documents) :-

Cases Work **Auto Claim Work Details V2 Create Closing Report ***

Create Closing Report | Create Closing Report View Instructions

Comments Complete Save Close

Claim Documents

▼ Claim

Claim Number	POL0001-001030	Claim Status	
Date Reported	12/07/2019	Policy Number	POL0001
Policy Effective Date	01/03/2019	Policy Expiration Date	29/02/2020
* Coverage	Premium	Date Of Last Claim	31/12/2018
Claim Outcome	Settled	Policy Status	Active
* Damage Amount	3,201	* Monthly Premium	99
		* Claim Settlement Amount	2,461

Now back in the Case Search view you get confirmation the Case instance has completed :-

Cases Cases

Cases Work

Add Case

Search: Policy Number

Title	Added On	Case Type	Policy Number	Claim Status	Insured FName	Insured LName
POL0001-001030	12/07/2019 07:31	Auto Insurance Claim	POL0001	Complete	Jennie	Formby

Search Advanced Search

And we can launch the Case Management view and examine the Case properties that were updated during the lifecycle :-

Cases Work **Auto Claim Case Details**

POL0001-001030 | Modified: 12/07/2019 16:10 | Auto Insurance Claim

Comments Add Activity Split Case

Claim Documents

▼ Claim

Claim Number	POL0001-001030	Claim Status	Complete
Date Reported	12/07/2019	Policy Number	POL0001
Policy Effective Date	01/03/2019	Policy Expiration Date	29/02/2020
Coverage	Premium	Policy Status	Active
Claim Outcome	Settled	Monthly Premium	99
Damage Amount	3,201	Claim Settlement Amount	2,461

And we can see documents :-

POL0001-001030 | Modified: 12/07/2019 16:10 | Auto Insurance Claim

Comments

Add Activity

Split Case 

Claim

Documents

Documents

Activities

History

Add 

Actions 

Home > Damages Evidence



SampleVideo1.mp4

Modified By: **deadmin** | Modified On: **12/07/2019 10:31**



auto-accident-scene.jpg

Modified By: **deadmin** | Modified On: **12/07/2019 10:23**



vehicle-damage-GIL1057.jpg

Modified By: **deadmin** | Modified On: **12/07/2019 10:30**



vehicle-damage-X865PHX.jpg

Modified By: **deadmin** | Modified On: **12/07/2019 10:31**

And we can see the Activities :-

Cases

Work

 Auto Claim Case Details

Required (4)



Create Adjuster Report

Completed on 6/27/2019, 8:04 AM



Create Closing Report

Completed on 6/27/2019, 9:41 AM



File Police Accident Report

Completed on 6/27/2019, 7:40 AM



Gather Accident Information

Completed on 6/27/2019, 7:55 AM

Optional (1)



Investigate Fraud

Waiting...

.. and History :-

Cases Work **Auto Claim Case Details**





Comments | Add Activity | Split Case

Claim Documents

Documents Activities **History**

Show: Summary for: All

Today


-  **Create Closing Report**
Activity completed
-  **Initiate Claims Processing**
Activity completed
-  **Create Closing Report**
Activity started
-  **Create Closing Report**
Activity ready

That's all for the MVP scenario walkthrough.

Appendix - Scenario Paths

The MVP scenario has a happy path that best shows off all the features and to achieve that requires choosing specific data items. First in the Auto Policy for the insured make sure there are settings for each of these :-

▼ Insured

Insured FName	Jennie	Insured LName	Formby
Insured License Number	LIC-010101	Insured DoB	05/11/1984 
Employment Status	Employed	Insured Marital Status	Divorced
Insured E-mail	jenform@gmail.com	Education	Bachelor
Insured Street	Las Vegas Blvd	Insured Phone	123-456-789
Insured State	NV	Insured City	Las Vegas
Insured Monthly Income	8,500	Insured ZIP	89101

For the insured vehicle use these settings (the highlighted items are the context-sensitive ones that are needed in the logic) :-

Vehicle

Vehicle Make	Mercedes	Vehicle Model	E-Class
Vehicle Year	2017	Vehicle Plate	GIL1057
Purpose of Use	Driving for Employer	Vehicle State	NV
Vehicle VIN	VIN111-222-333	Vehicle ZIP	89101

Now when you are in Gather Accident Information activity in the Auto Claim, ensure you set at least the below items in the Accident section (checking On Private Property is vital to trigger the correct ODM path) :-

Cases

Work Gather Accident Information Gather Accident Information *

Claim Documents

Accident

Describe Loss Location

Description Loss/Damage

Collision

* Date-Time of Loss 12/07/2019 01:00

Loss Street

Loss City

Loss State

Loss ZIP

On Private Property

Weather Condition Heavy Rain

Police or Fire Dept Contacted

In the Insured Vehicle provide additional values as shown (you can choose any values here just don't leave them blank) :-

Insured Vehicle

* Vehicle Make	Mercedes	* Vehicle Plate	GIL1057
* Vehicle Model	E-Class	* Vehicle State	NV
Vehicle Year	2017	* Vehicle ZIP	89101
* Purpose of Use	Driving for Employer	* Vehicle VIN	VIN111-222-333
Vehicle Context	Moving	Vehicle Damage Estimate	1234

Finally for the other vehicle you should complete all fields but the ones shown below are the sensitive ones and you should match the screenshot choices below exactly :-

Other Vehicle

Other Vehicle Make	Cadillac	Other Vehicle Policy Number	
Other Vehicle Model	Escalade	Other Vehicle Context	Moving
Other Vehicle Year		Other Vehicle Insurance	
Other Vehicle Plate	X865PHX	Damage Estimate	
Other Vehicle State			
Other Vehicle VIN	VIN444-555-666		
Other Vehicle ZIP	80911		

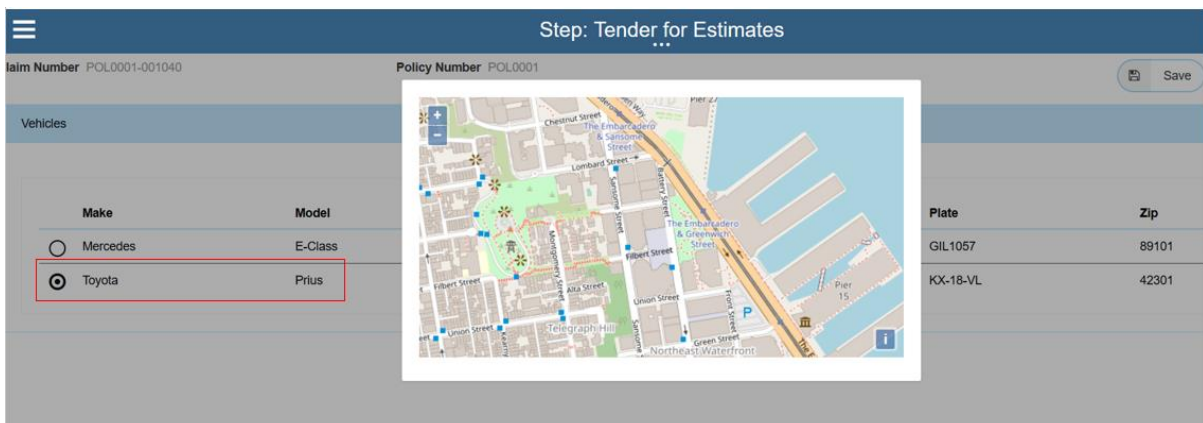
If you do not choose these Vehicle options you just get default behaviour in sections of the solution as follows ...

So let's say we choose a different vehicle choice and location for the other vehicle :-

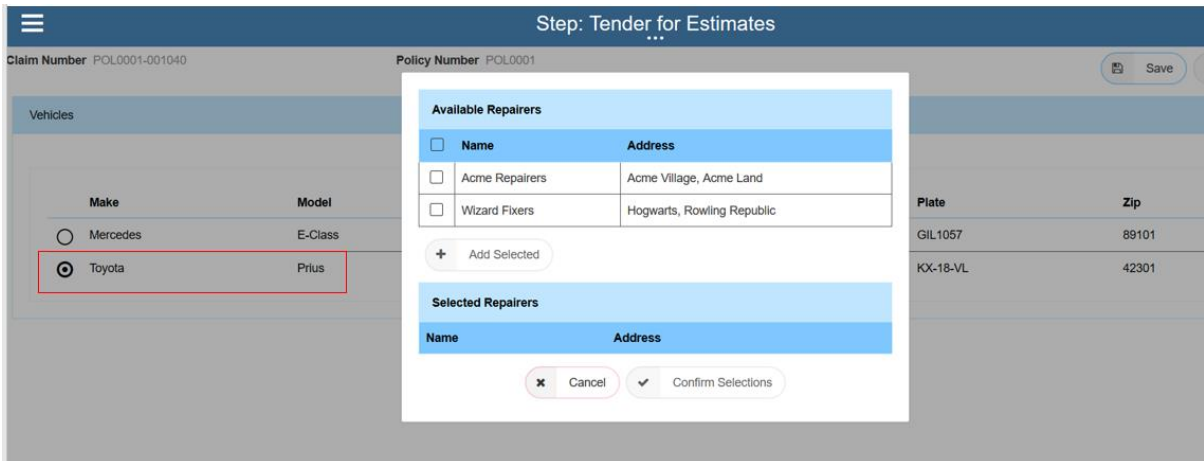
Other Vehicle

Other Vehicle Make	Toyota	Other Vehicle Policy Number	
Other Vehicle Model	Prius	Other Vehicle Context	Stopped In Traffic
Other Vehicle Year		Other Vehicle Insurance	
Other Vehicle Plate	KX-18-VL	Damage Estimate	
Other Vehicle State			
Other Vehicle VIN	VIN777-888-999		
Other Vehicle ZIP	42301		

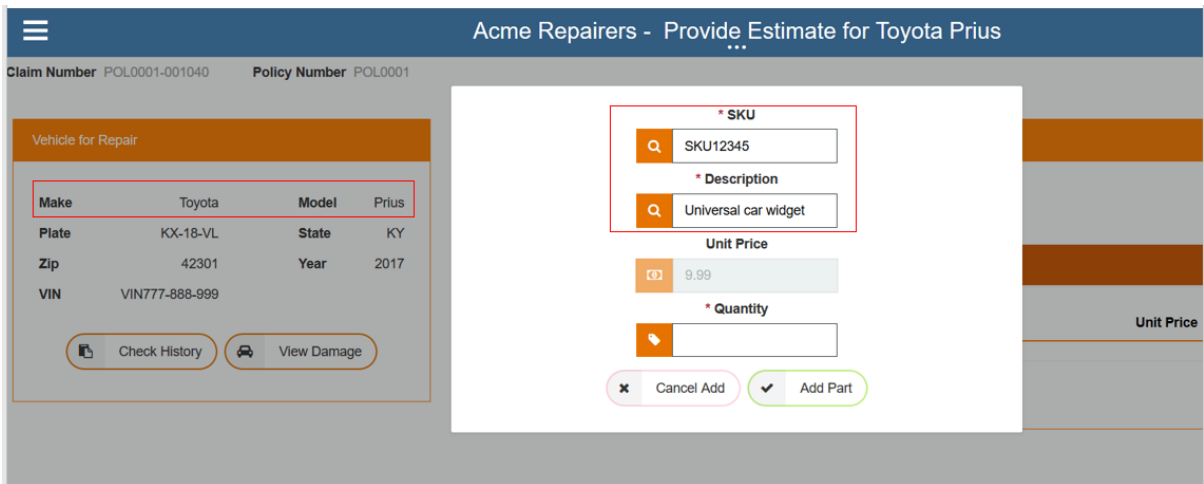
When you reach the work item to Tender for Estimates the car location map just picks up a default place (the HQ of Levi Straus given their association with denim) :-



The available repairers to choose from also defaults rather than being location-sensitive :-



Then when you go into the work item to Provide Repair Estimate the only part option you have is this one :-



So you can still navigate a successful E2E scenario you just don't get the full richness of features.