NAVIGATING THE COMPLEX TRANSITION

Migrating Business Workflows from Camunda 7 to Camunda 8 in Financial Services

BNY

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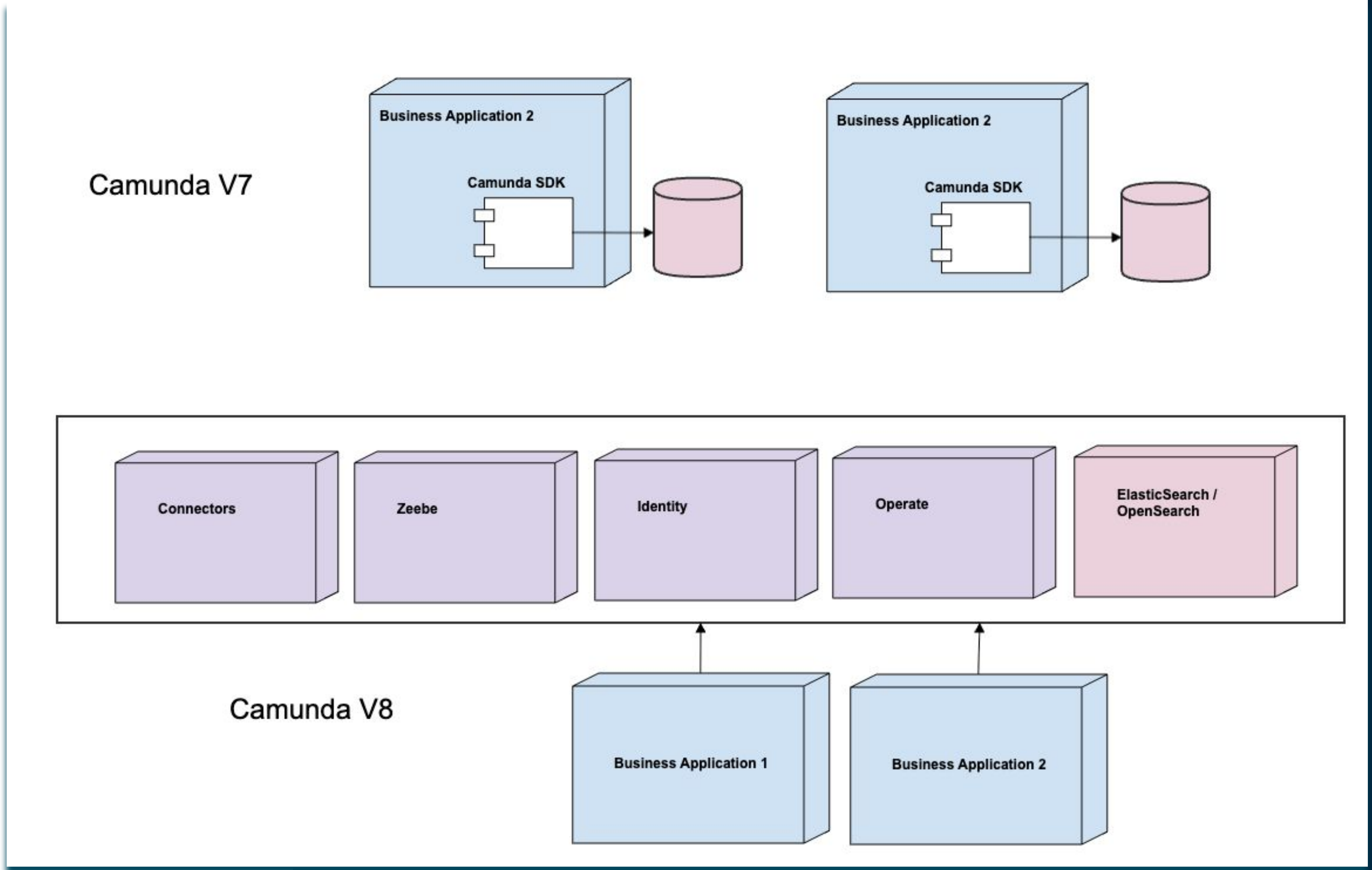
- 25 years of experience developing software for the financial industry.
- Worked for number of Wall Street investment banks and fintech companies before joining BNY in 2015.
- Proponent of technical excellence, continuous learning, creative thinking (patent on electronic signature matching “USSN: 16/182,789”) and anything that leads to elimination of "waste“.
- Promoted to “Distinguished Engineer” in 2021 as recognition for his contributions to technology at BNY.

Camunda Deployment Models



Context

- Some systems running on Camunda 8 in prod
- 80+ applications running on Camunda 7
- Multiple workflow engines and task management systems
- Migration to centralized workflow service (Camunda 8)

Note: Camunda 7 community EOL: Oct 2025,   Enterprise: 2030

Challenges in Financial Services Sector

- Long-running processes
- Stringent audit requirements
- Recoverability
- Data traceability
- Ensuring seamless transition
- Leveraging full potential of Camunda 8

Long-Running Processes

- Financial services involve complex, extended processes
- Require robust management and monitoring
- Recoverability SaaS vs OnPrem
- Replaying back events
- No storage – event driven architecture

Audit Requirements

- Financial industry is heavily regulated
- Necessitates stringent audit requirements
- Kafka as a distributed data store
- Using ElasticSearch/OpenSearch

Recoverability

- High availability / Fault tolerance with Zeebe cluster
- Versioning
- Blue/Green deployments
- File based snapshot recovery vs event replay
- Engine vs Workers (separating processing from business logic)

Data Traceability

- Ensures accurate tracking of transactions
- Provides an append-only log
- Records all process events
- Distributed architecture

User Tasks

- Business Processes often involve user tasks requiring human intervention
- Manages and executes user tasks (REST API)
- Combining data with Forms.
- Tasklist, Forms and other Customizations

Summary

- Increase in complexity of Camunda 8 architecture needed to support ever changing data processing requirements.
- Separating Camunda engine (Zeebe) from processing code allows for supporting flexible deployment and processing models.
- Changing APIs and transition into service-based architecture adding additional challenges to migration process.
- Simplification journey – removing services (example KeyCloak), consolidation of APIs, client SDKs making platform more usable
- Trying to adopt existing code to the the architecture (Camunda 7 Adaptor) is time consuming. Consider code refactoring.
- AI is rapidly changing business workflow eco-system. Deterministic workflows vs agentic executions will drive changes in the business processes.

Resources

Blog post Feb 2025 on Update Strategy:

https://camunda.com/blog/2025/02/migrating-solutions-camunda-7-camunda-8-strategy-update/

Migration Journey:

https://docs.camunda.io/docs/guides/migrating-from-camunda-7/migration-journey

Migration Technical Details:

https://docs.camunda.io/docs/guides/migrating-from-camunda-7/technical-details/

Q&A

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