

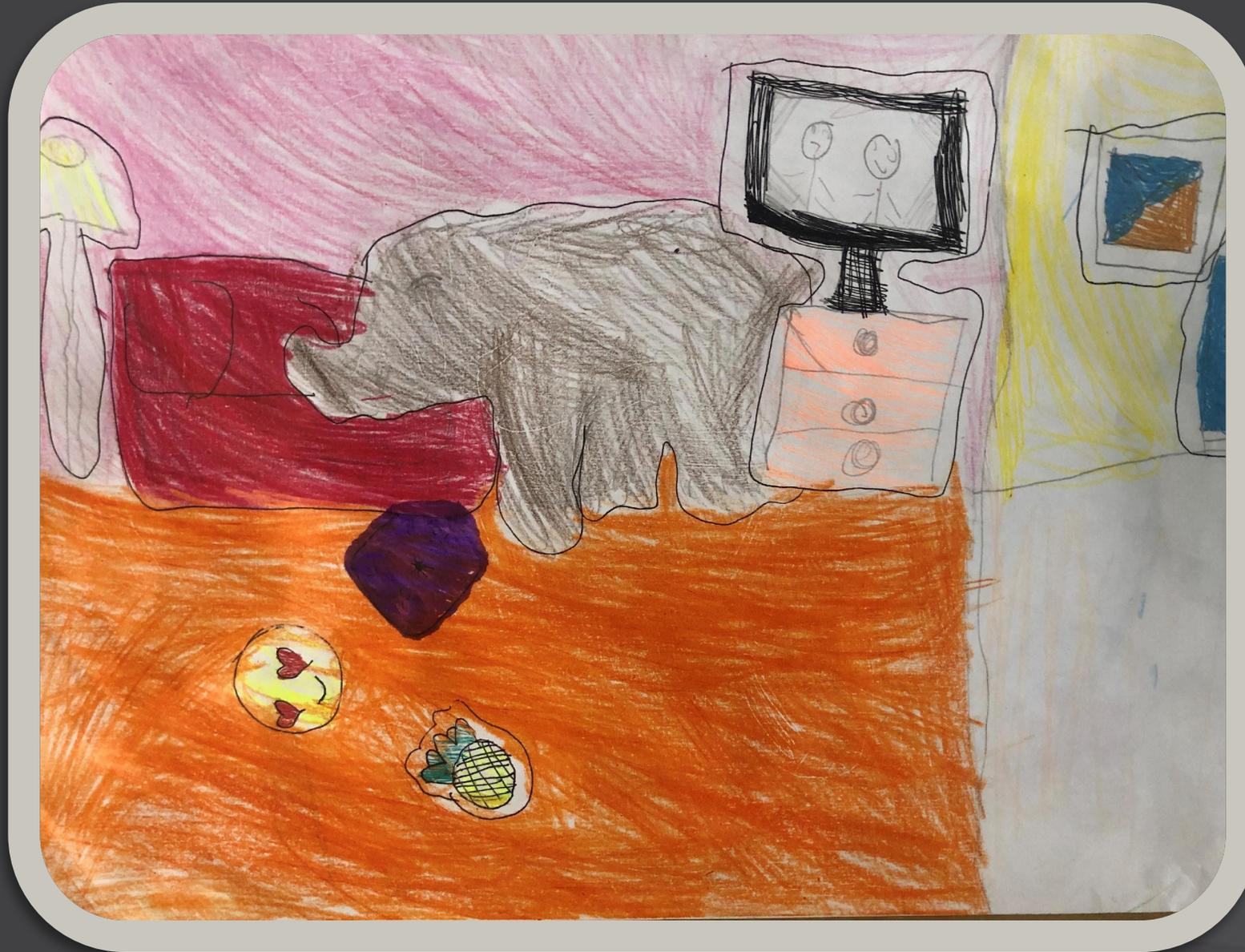
**CAMUNDA  
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LIVE**

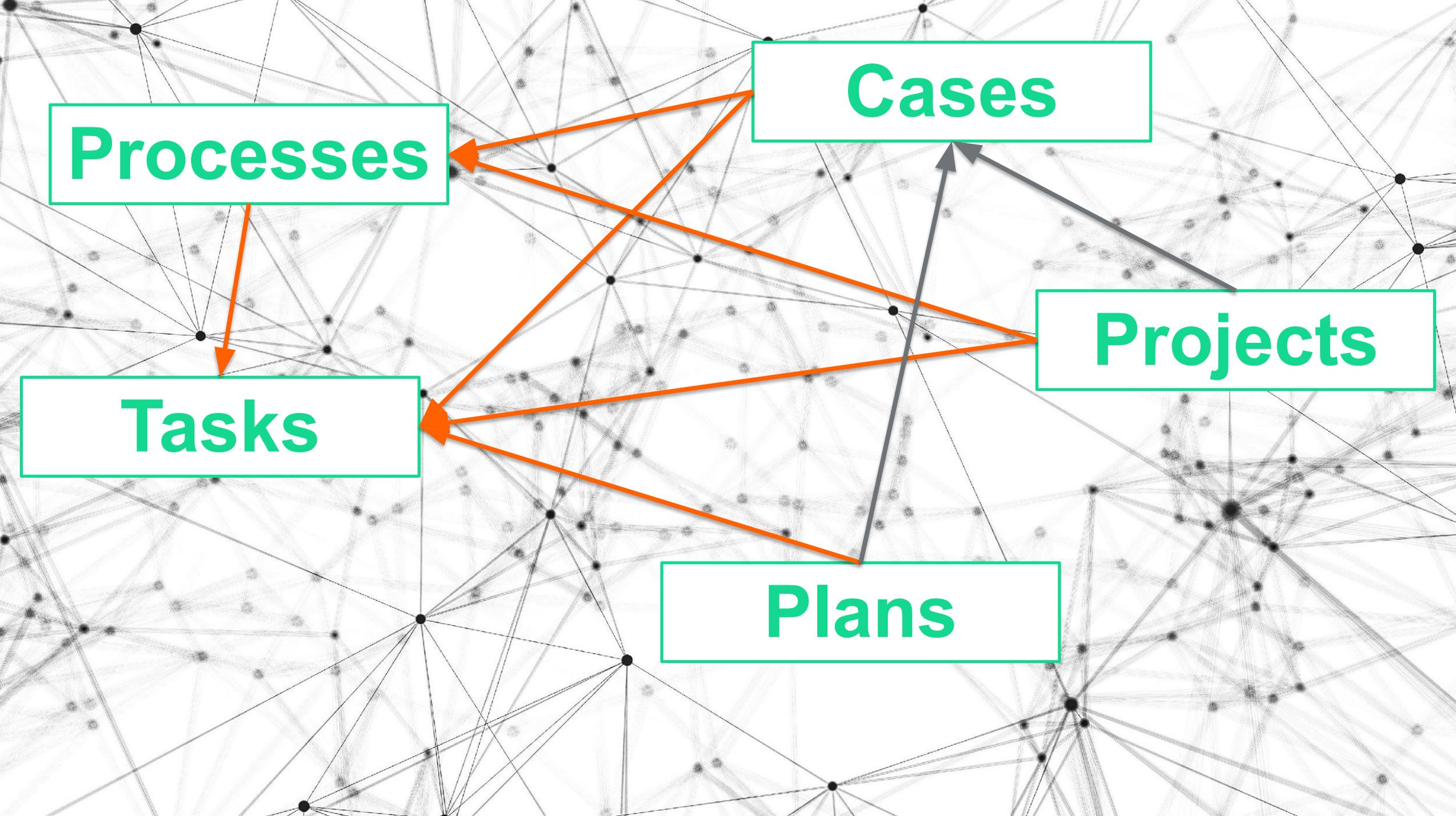
# Processes, Cases, Projects, and Plans: Avoiding Common Automation Pitfalls

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# The elephant in the living room





**Cases**

**Processes**

**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

# Processes and Cases

## Order-to-cash

# Case oriented Work

Standard Order 108792

Related Apps

Sold-to Party: [Bike On \(LACU\\_S04\)](#) Overall Status: In Process Ovr Delivery Status: Not Delivered Approval Status: Not Relevant Net Value  
Rejection Status: Nothing Rejected Credit Status: Released **3,977.00 USD**



General Information Items Business Partners Process Flow

Sales Area: Dom. Sales Org US, Direct Sales, Product Division 00	Customer Reference: 4500201531	Document Date: 12/31/2021	Delivery Block: -
Employee Responsible: -	Customer Ref. Date: -	Billing Block: -	

## Items

Search  🔍 Show Details ⚙️ ▾

Item	Product	Requested Quantity	Item Category	Requested Delive...	Net Value	Configuration
10	<a href="#">R200 Bike (MZ-FG-R200)</a>	1.000 PC	Standard Item (TAN)	12/31/2021	3,977.00 USD	>

# Case oriented Work

SAP Manage Sales Orders

Standard  
Filtered By (3): Sales Organization, Distribution Channel, Division

Sales Orders (109,783) Standard

Create Reject All Items Set Delivery Block Remove Delivery Block Set Billing Block Remove Billing Block

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

What should I do next?

# Process automation solutions

# Task oriented Work

The screenshot displays the Camunda Tasklist interface. On the left, a task list shows several tasks, including 'Verify Customer Credit' and 'Issue Delivery Timeframe'. The main area shows the details for a selected task, 'Verify Customer Credit', which is an 'Order to Cash' task. The task form includes a 'Set follow-up date' button and a 'Set due date' button. Below the buttons, there is a section for variables with a table:

Name	Type	Value
		12/31/2021
		4500203071
		Carefree Cycles (CACU_S04)
		108793

A large green box with the text 'Silver bullet?' is overlaid on the variable table. At the bottom right of the task form, there is a 'Complete' button. The footer of the interface indicates the date and time in the local timezone (Europe/Dublin) and the version of the Camunda Platform (v7.15.0).

# Matching...

< **SAP** Sales Order ▾

Standard Order 108792 Related Apps

General Information Items Business Partners **Tasks**

### Camunda Tasklist

> Created ▾ +

*Filter Tasks* 9

<b>Verify Customer Credit</b> Order to Cash Created an hour ago	50
<b>Issue Delivery Timeframe</b> Order to Cash Created an hour ago	50
<b>Shipp for delivery</b> Order to Cash Created an hour ago	50
<b>Record Order in Sales Ledger</b> Order to Cash Created an hour ago	50

# Documents in the process?

# Document intensive case

WKS Power SharePoint

Search this library

1 selected Book Keeping Submissions\*

### Book Keeping Submissions

Name	Client	Month	Year	+ Add column
CACU_S04-2021-01	Carefree Cycles (CACU_S04)	1	2,021	
CACU_S04-2021-02	Carefree Cycles (CACU_S04)	2	2,021	
CACU_S04-2021-03	Carefree Cycles (CACU_S04)	3	2,021	
CACU_S04-2021-04	Carefree Cycles (CACU_S04)	4	2,021	
CACU_S04-2021-05	Carefree Cycles (CACU_S04)	5	2,021	
<input checked="" type="checkbox"/> CACU_S04-2021-06	Carefree Cycles (CACU_S04)	6	2,021	
CACU_S04-2021-07	Carefree Cycles (CACU_S04)	7	2,021	
CACU_S04-2021-08	Carefree Cycles (CACU_S04)	8	2,021	
CACU_S04-2021-09	Bike On (LACU_S04)	9	2,021	

#### CACU\_S04-2021-06

Has access

Manage access

Properties [Edit all](#)

- Content Type: Book Keeping Submission
- Client \*: Carefree Cycles (CACU\_S04)
- Year \*: 2,021
- Month \*: 6
- Name \*: CACU\_S04-2021-06

# Matching...

The screenshot shows a SharePoint library interface for 'Book Keeping Submissions' with a folder named 'CACU\_S04-2021-01'. The left sidebar lists several PDF files: 'invoices.pdf', 'payroll.pdf', 'expenses-claims.pdf', and 'expenses-claims1.pdf'. The main content area displays a document viewer for 'CACU\_S04-2021-01'. A 'Camunda Tasklist' is embedded within this viewer, showing a list of tasks: 'Fillout VAT refunds', 'Fillout payroll request', and 'Verify Submission'. The 'Fillout payroll request' task is selected, and its details are shown on the right, including a 'Form' tab and options to 'Set follow-up date' and 'Set due date'. The task list includes a 'Filter Tasks' input field and a count of 3 tasks. The interface also features a top navigation bar with 'WKS Power' branding and a search bar.

WKS Power SharePoint

Search this library

+ New Upload Share Copy link Sync Download Add shortcut to OneDrive Export to Excel Power Apps Automate Book keeping files

Book Keeping Submissions > CACU\_S04-2021-01

Has access

Manage access

Camunda Tasklist

Created +

Filter Tasks 3

Fillout VAT refunds  
Created a minute ago 50

Fillout payroll request  
Created 2 minutes ago 50

Verify Submission  
Created 2 minutes ago 50

Fillout payroll request

Set follow-up date Set due date

Form History Diagram Description

You can set variables, using a generic form, by clicking the "Add a variable" link below.

Add a variable +

Load Variables

More details

# Organizing information

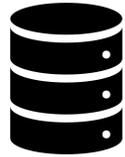
Case Information

Process Information

Task Information

# Organizing Information

Case - The "Digital Folder"



Volatile

# Special types of cases



# Process and Plans

The screenshot shows a Jira Software interface for a project named 'Intelligent Process Automation' and a specific sprint titled 'IPA Sprint 1'. The top navigation bar includes 'Jira Software', 'Your work', 'Projects', 'Filters', 'Dashboards', 'People', 'Apps', and a 'Create' button. A search bar and utility icons are on the right. The sprint overview shows '9 days remaining' and a 'Complete sprint' button. The board is organized into columns: 'TO DO 12 ISSUES', 'ON HOLD', 'IN PROGRESS 5 ISSUES', 'REVIEW 3 ISSUES', and 'DONE 4 ISSUES'. Two main categories are expanded: 'IPA-1 New admin form' (3 issues) and 'IPA-2 2 6 issues'. Issues are represented as cards with titles and IDs, such as 'Update UAT automation' (IPA-13) and 'Update UI' (IPA-12). Some cards are highlighted in light blue or light orange. A 'GROUP BY Subtask' dropdown and an 'Insights' button are visible on the right side of the board.

## 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

# Different solutions

There is no silver bullet

Case oriented solution

Task oriented solution

# Where should elephants live?



**CAMUNDA  
CON  
LIVE**

**Questions?**

