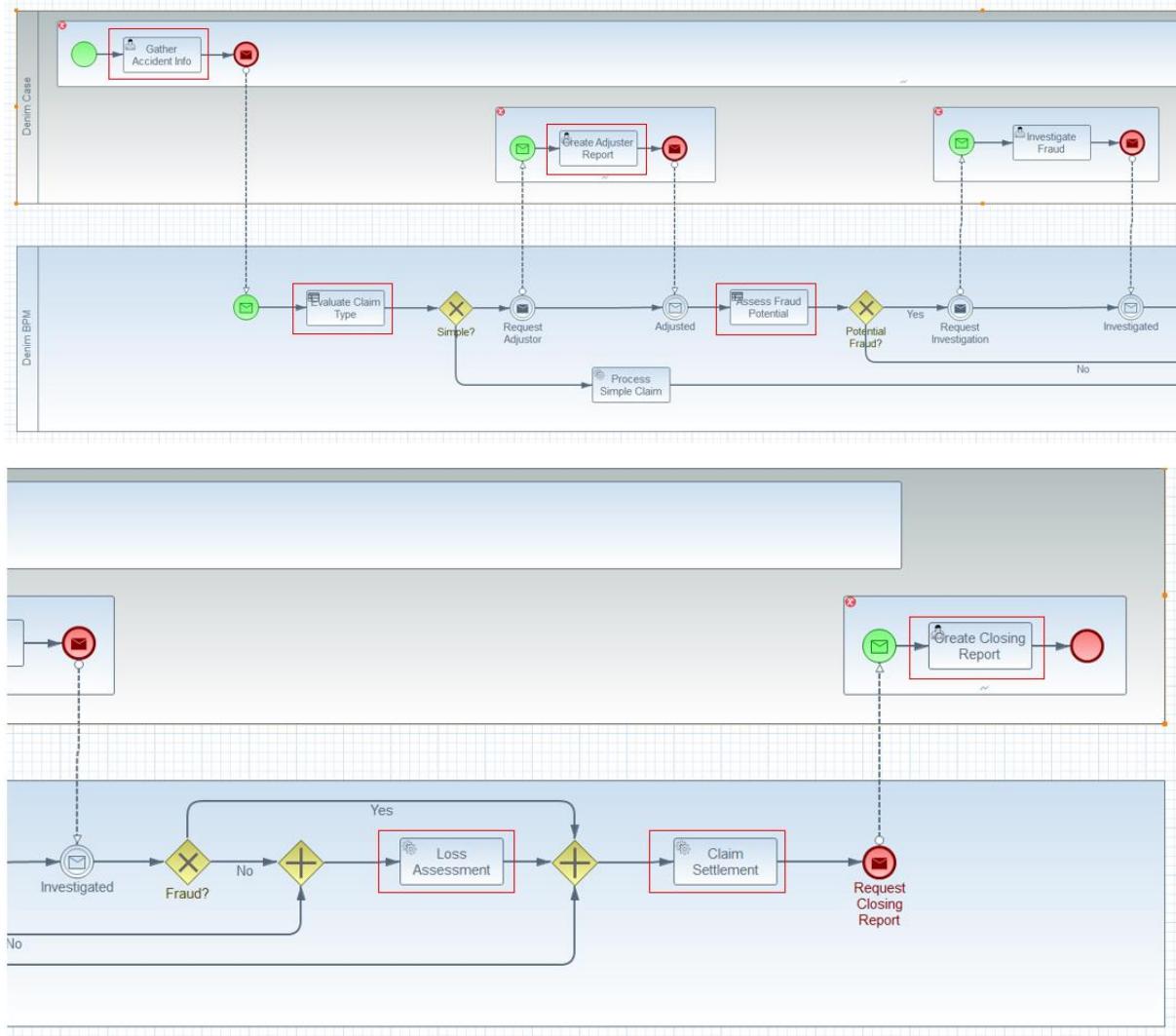


Scenario Summary

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 :-

IBM Business Automation Workflow Case Client

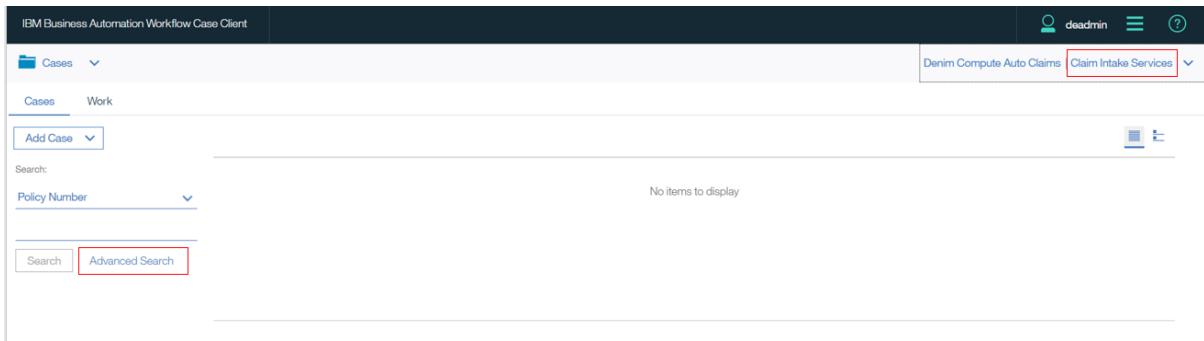
deadmin

Cases Work Add Case

Search: Policy Number

No items to display

Search Advanced Search



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

Advanced Search

Added On:

dd/MM/y and dd/MM/y

Insured FName:
Jennie

Insured LName:
Formby

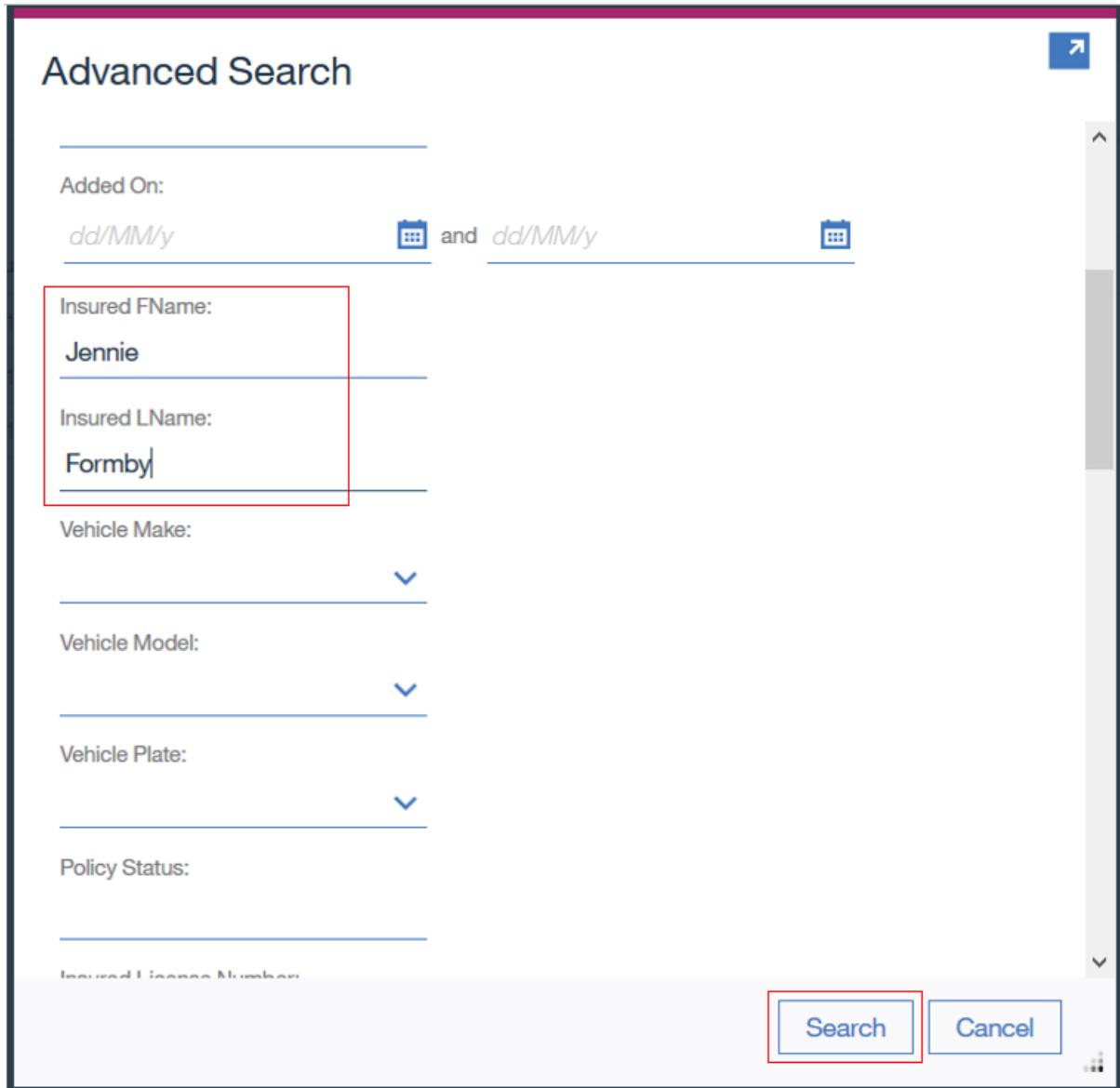
Vehicle Make:

Vehicle Model:

Vehicle Plate:

Policy Status:

Search Cancel



The search finds the policy number "POL0001" :-

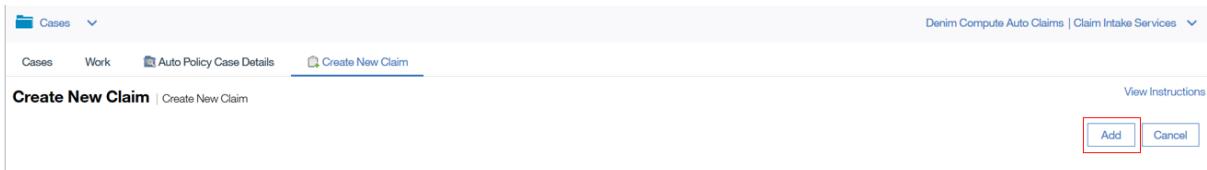
Title	Insured FName	Insured LName	Case Type	Policy Status	Insured License Number
POL0001	Jennie	Formby	Auto Insurance Policy	Active	LIC-010101

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 :-

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 :-

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 :-

A screenshot of an 'Advanced Search' dialog box. It has several input fields and dropdowns:

- 'Case type:' dropdown set to 'Auto Insurance Claim' (highlighted with a red box).
- 'Match criteria:' dropdown set to 'All'.
- 'Policy Number:' input field containing 'POL0001' (highlighted with a red box).
- 'Claim Number:' input field (empty).
- 'Added On:' date range input fields with calendar icons (highlighted with a red box).
- 'Insured FName:' input field (empty).
- 'Insured LName:' input field (empty).
- 'Search' and 'Cancel' buttons at the bottom, with 'Search' highlighted with a red box.

... 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 Work

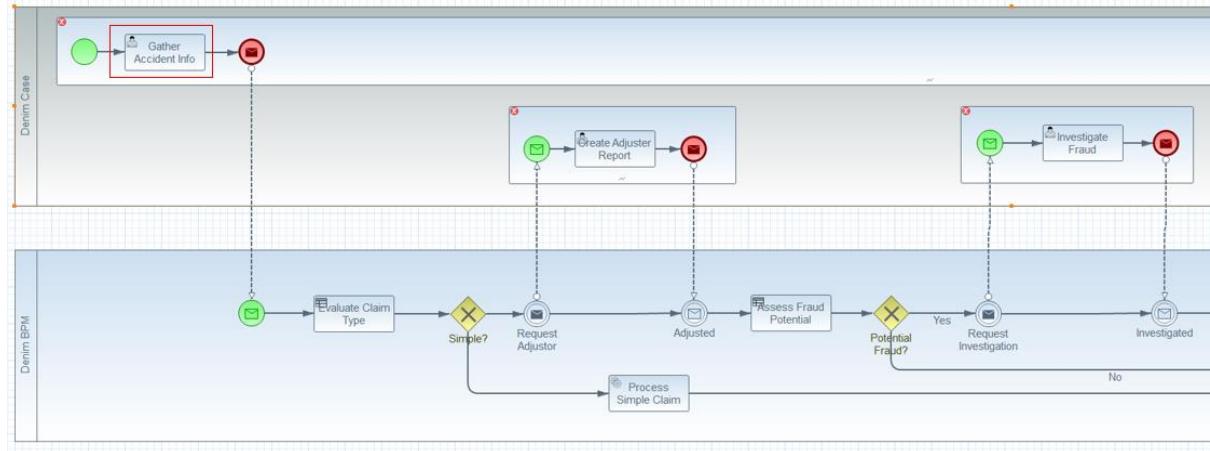
Manage Roles Add Case ▾

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 :-

The screenshot shows the 'Auto Claim Case Details' page for case 'POL0001-001030'. The 'Add Activity' button is highlighted with a red box. Other visible buttons include 'Comments', 'Split Case', 'Claim', and 'Documents'.

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

The screenshot shows the 'Add' dialog box. It displays the text 'Select a type:' followed by a dropdown menu containing 'File Police Accident Report'. Below it, the text 'Enter a name:' is followed by an input field containing 'File Police Accident Report'. At the bottom are 'OK' and 'Cancel' buttons.

Again click Add on the resulting activity :-

The screenshot shows the 'File Police Report Add Activity' page. The 'Add' button is highlighted with a red box. Other visible buttons include 'Cancel' and 'View Instructions'.

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

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 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: Browse... 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

Add

You then see the added document in the folder :-

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 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 the 'File Police Report' section of the application. At the top, there are tabs for 'Cases' and 'Work', and a sub-tab 'File Police Report Work Details'. Below these are sections for 'Comments' (with a note 'POL0001-001030') and 'Documents' (with tabs for 'Activities' and 'History'). At the bottom right, there are buttons for 'Complete', 'Save', and 'Close', with 'Complete' being highlighted by a red box.

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 the 'Gather Accident Information' screen. At the top, there are tabs for 'Cases' and 'Work', and a sub-tab 'Gather Accident Information'. Below these are sections for 'Comments' and 'Claim' (which is selected). The 'Claim' section contains several data entry fields: 'Claim Number' (POL0001-001030), 'Date Reported' (12/07/2019), 'Policy Effective Date' (01/03/2019), 'Coverage' (Premium), 'Policy Number' (POL0001), 'Policy Expiration Date' (29/02/2020), 'Date Of Last Claim' (12/07/2019), and '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 :-

Gather Accident Information | Gather Accident Information

Comments

Claim Documents

View Instructions

Close Save Validate and Complete

Claim

Policy 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 Work 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

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 [i](#)

Properties

* Class: **Claim Supporting Document**

Document Title: [i](#)

Claim Number: i	POL0001-001030
Policy Number: i	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 [i](#)

Properties

* Class: **Claim Supporting Document**

Document Title: [i](#) auto-accident-scene.jpg

Claim Number: [i](#) POL0001-001030

Policy Number: [i](#) 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

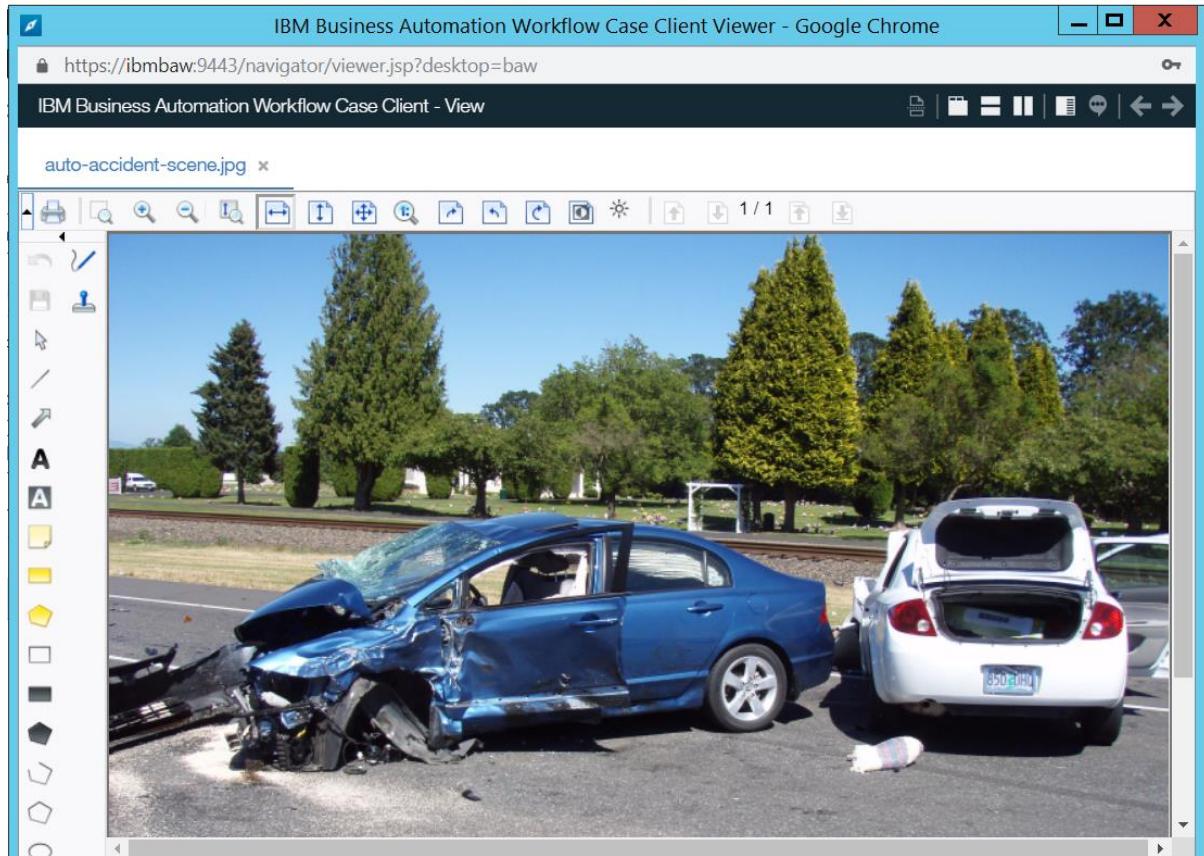
Documents Activities History

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 [i](#)

▼ Properties

* Class: Vehicle Damage

Document Title: [i](#) vehicle-damage-GIL1057.jpg

Document Type: [i](#) Image

Vehicle Plate: [i](#) 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 [i](#)

▼ Properties

* Class: Vehicle Damage

Document Title: [i](#) SampleVideo1.mp4

Document Type: [i](#) Video

Vehicle Plate: [i](#) 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 [i](#)

▼ Properties

* Class: Vehicle Damage

Document Title: [i](#) vehicle-damage-X865PHX.jpg

Document Type: [i](#) Image

Vehicle Plate: [i](#) X865PHX

After this we have these documents uploaded :-

Claim Documents

POL0001-001030

Documents Activities History

Add [v](#) Add Document Set Property Actions [v](#)

Home > Damages Evidence

Name	Modified By	Modified On
SampleVideo1.mp4	deadmin	12/07/2019 10:31
auto-accident-scene.jpg	deadmin	12/07/2019 10:23
vehicle-damage-GIL1057.jpg	deadmin	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](#)

[Claim](#) [Documents](#)

[Close](#) [Save](#) [Validate and Complete](#)

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 :-

Gather Accident Information | Gather Accident Information

[Comments](#)

[Documents](#)

[Claim](#)

[Close](#) [Save](#) [Validate and Complete](#)

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

Invalid Accident Report Date

[OK](#)

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

[Comments](#)

[Documents](#)

[Claim](#)

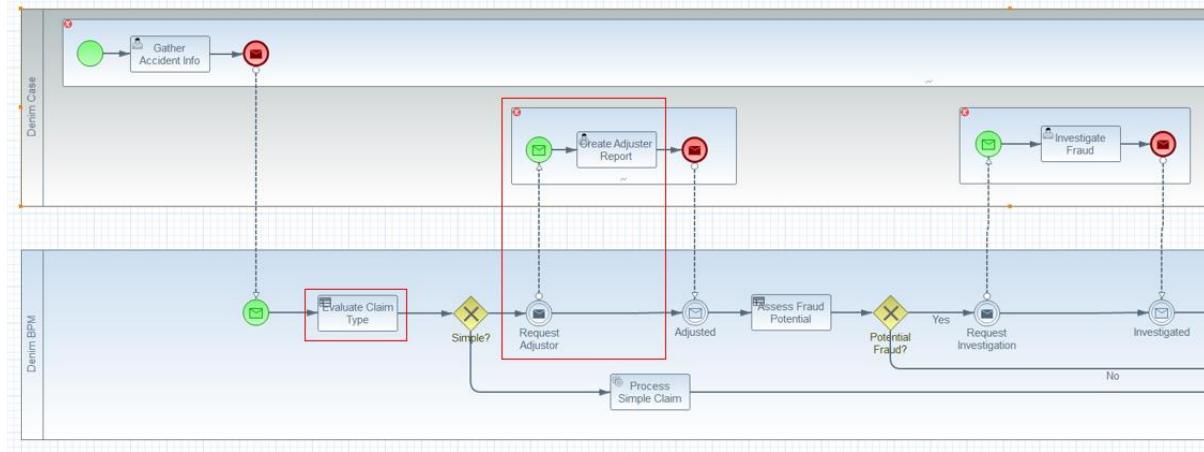
[Close](#) [Save](#) [Validate and Complete](#)

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 :-

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 :-

The screenshot shows the Camunda BPM Designer application. On the left, there's a sidebar with icons for search, filter, and process instances. The main area has a search bar at the top. Below it, a table lists a single process instance:

Initiate Claims Processing:160	
Initiate Claims Processing	
Last modified	Jul 12, 2019 Due Jul 12, 2019

On the right, a detailed view for the selected instance is shown. It includes sections for Details, Message events (1), Locations, and Data. The Data section lists various variables with their values:

- activityName(String) <Empty>
- claimCaseId(String) 20E1E4B6-0000-CFF2-9522-8879E9E30C3B
- claimNumber(String) P0L0001-001030
- policyNumber(String) P0L0001
- isSimpleClaim(Boolean) False
- isPotentialFraud(Boolean) <Empty>
- isFraudulentClaim(Boolean) <Empty>
- isCashSettlement(Boolean) <Empty>
- reportCreatedPayload(ClaimAdjusterReportCreatedEventPayload) <Empty>
- fraudInvestigatedPayload(ClaimFraudInvestigatedEventPayload) <Empty>
- autoClaim(AutoClaim)

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) :-

Select shown instances | Select all instances | Clear selection

Showing 1 of 1 instances

Sort by: Date of last action

Initiate Claims Processing:160 **Initiate Claims Processing**

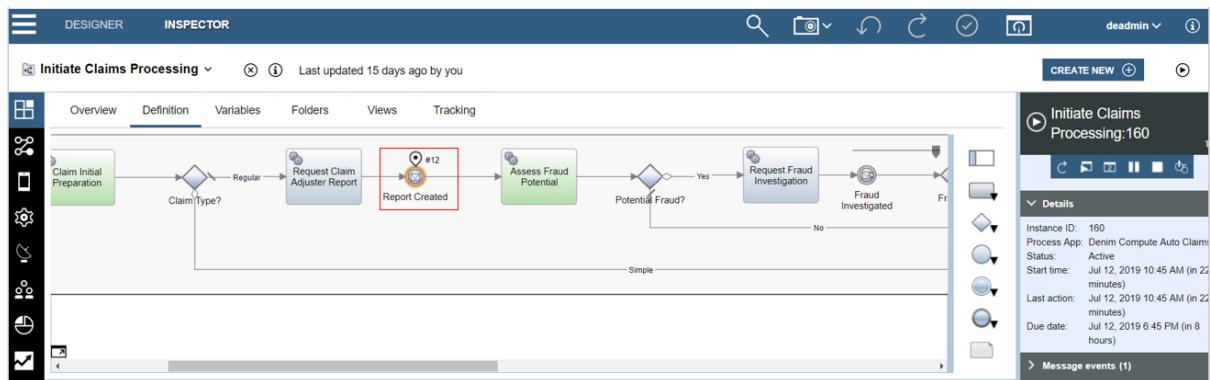
Last modified Jul 12, 2019 Due Jul 12, 2019

```

isCashSettlement(Boolean) <Empty>
reportCreatedPayload(ClaimAdjusterReportCreatedEventPayload) <Empty>
fraudInvestigatedPayload(ClaimFraudInvestigatedEventPayload) <Empty>
autoClaim(AutoClaim)
otherVehicle(Vehicle)
casePath(String) /IBM Case Manager/Solution Deployments/Denim Compute Auto Claims/Case Types/DENI1_lossDamageDescription(String) Collision
policyNumber(String) POL0001
claimSettlementAmount(Integer) <Empty>
claimSettlementComments(String) <Empty>
damagesEstimateAmount(Integer) <Empty>
claimNumber(String) POL0001-001030
insuredVehicle(Vehicle)
zip(String) 89101
condition(String) Tyres - legal but thread depth low on nearside front, braking system - adequate, front head
repairerList(VehicleRepair)(list) <Empty>
docs(VehicleDocument)(list) <Empty>
year(String) 2017
model(String) E-Class
vin(String) VIN111-222-333
plate(String) GIL1057
damageAmount(Integer) 1,234
state(String) NV
make(String) Mercedes

```

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

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 I license Number	LIC-010101	Insured Phone	123-456-789

19/07/2019 11:29 - This form has been submitted. A summary of the information you have provided will be sent to you via email.

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

View Instructions

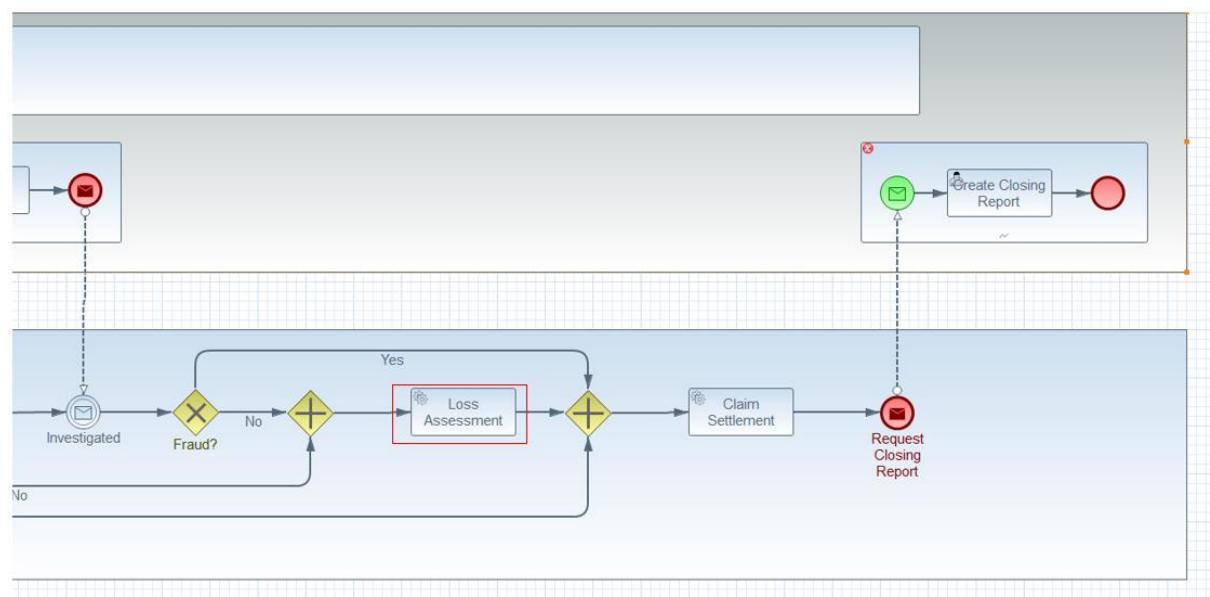
Comments Complete Save Close

Claim Documents

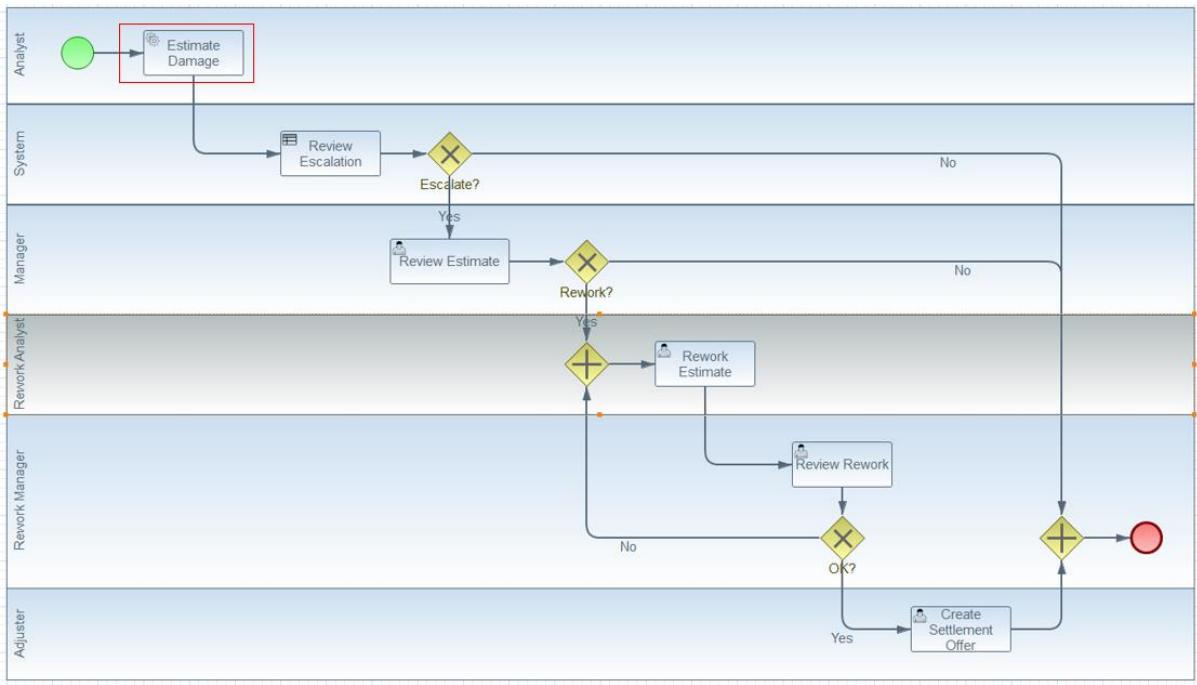
Claim

... (redacted)

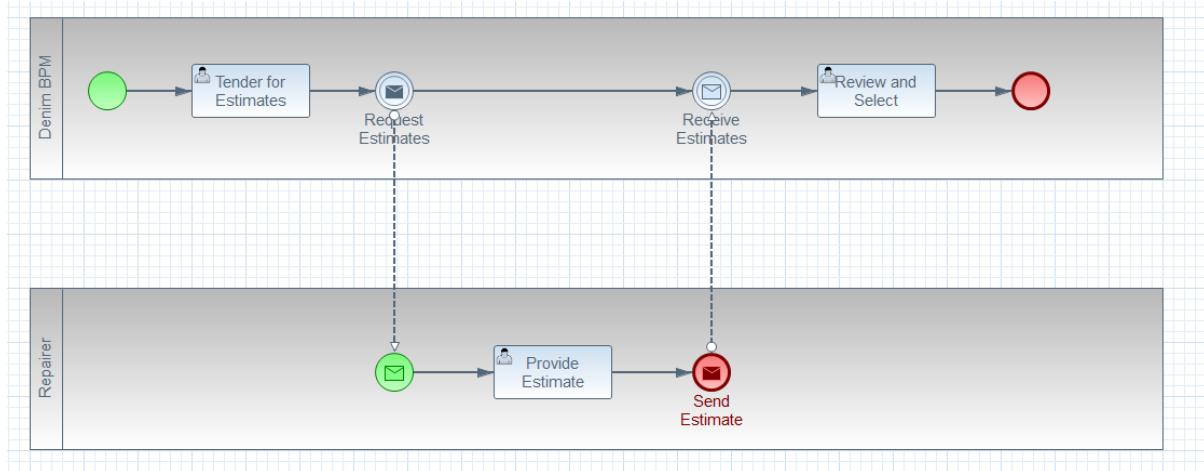
The BPM part of the workflow now calls another ODM service to assess if any Fraud (in our MVP scenario the result is that none is detected) and eventually moves on to the Loss Assessment section in the workflow :-



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 :-



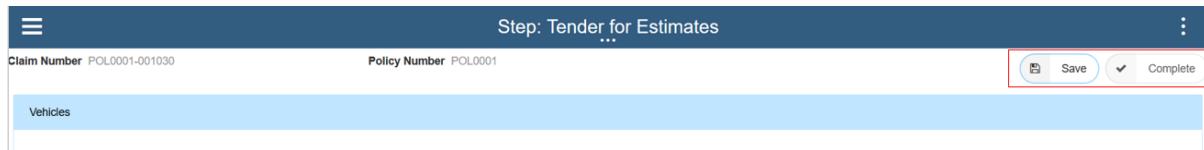
For the next set of activities we can either switch context to the Work Dashboard plugin (normally we would also log in as different user but for expediency of demo we have a power user that is a member of all roles in the scenario) or login directly to the Process Portal. Here is the Work Dashboard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

You then see the awaiting work item :-

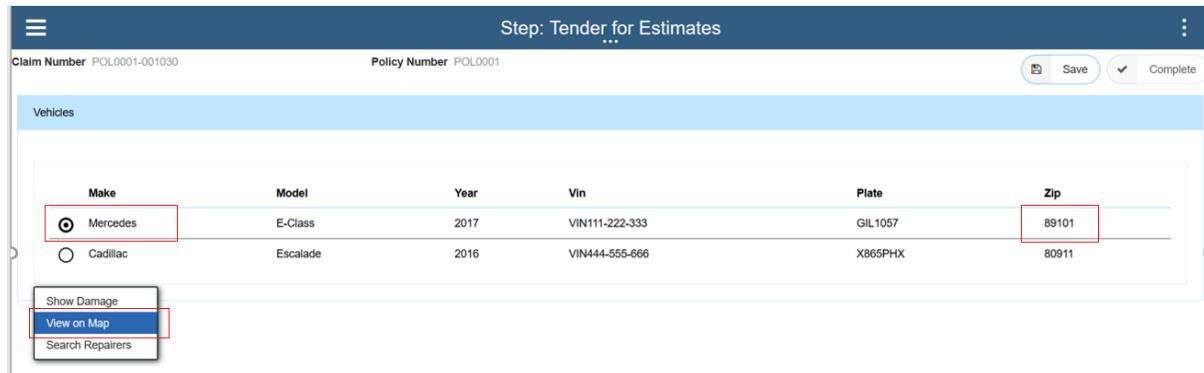
The work item details show claim summary info and the list of vehicles that have damages to be estimated :-

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 :-

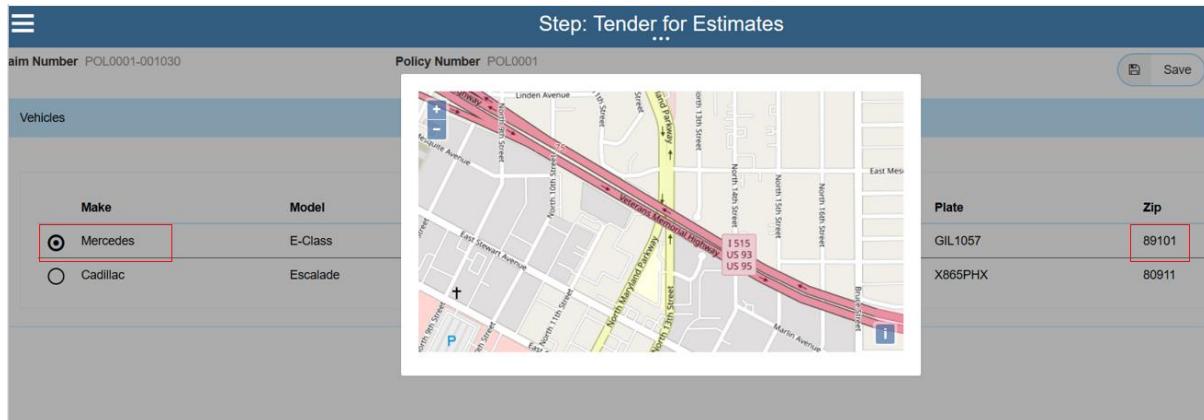
Back to this specific work item, Save is available at any time to save partial work, while Complete however has had validation built-in – here it is disabled as the necessary selection of repairers for each vehicle has not been done yet :-



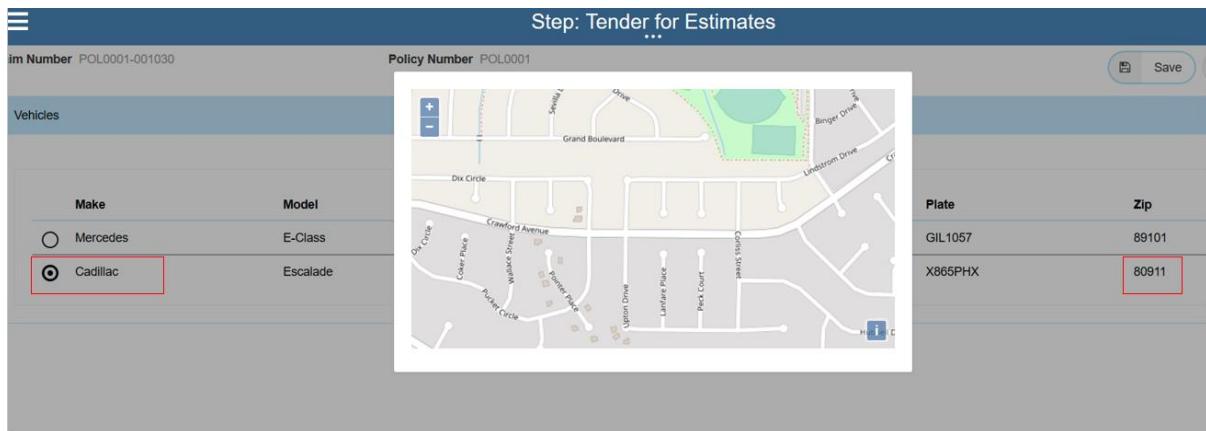
When the user selects a Vehicle from the list they get a popup menu of options :-



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 of 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) :-

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			

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

Number	POL0001-001030	Policy Number	POL0001						
Vehicles									
Make	Model								
<input checked="" type="radio"/> Mercedes	E-Class								
<input type="radio"/> Cadillac	Escalade								
<div style="border: 1px solid #ccc; padding: 10px;"> <h3>Vehicle Damage</h3> <table border="1"> <thead> <tr> <th>Title</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/> SampleVideo1.mp4</td> <td>Video</td> </tr> <tr> <td><input type="radio"/> vehicle-damage-GIL1057.jpg</td> <td>Image</td> </tr> </tbody> </table></div>				Title	Type	<input type="radio"/> SampleVideo1.mp4	Video	<input type="radio"/> vehicle-damage-GIL1057.jpg	Image
Title	Type								
<input type="radio"/> SampleVideo1.mp4	Video								
<input type="radio"/> vehicle-damage-GIL1057.jpg	Image								
<table border="1"> <thead> <tr> <th>Plate</th> </tr> </thead> <tbody> <tr> <td>GIL1057</td> </tr> <tr> <td>X865PHX</td> </tr> </tbody> </table>				Plate	GIL1057	X865PHX			
Plate									
GIL1057									
X865PHX									

When you select from the list the document loads :-

Policy Number POL0001

Vehicle Damage

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

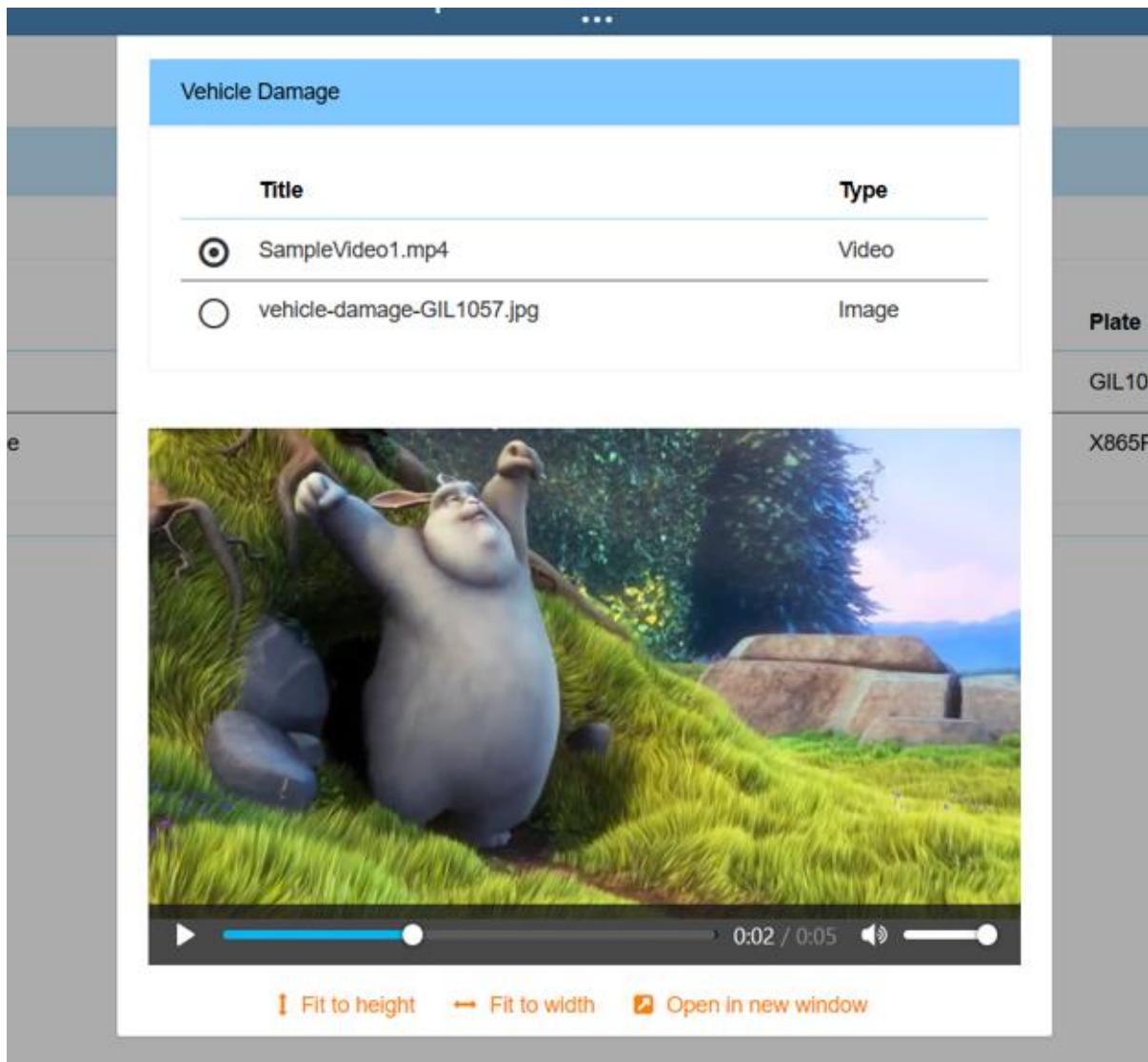


Fit to height

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 :-

Make	Model
<input type="radio"/> Mercedes	E-Class
<input checked="" type="radio"/> Cadillac	Escalade

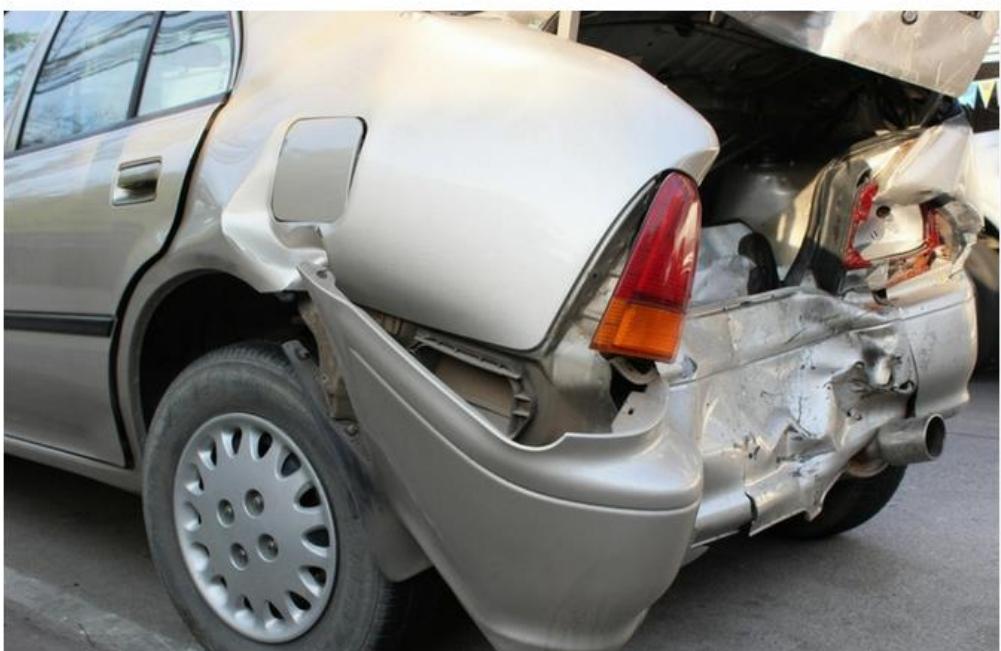
2016 VIN444-555-666 GIL1057 X865PHX

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

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 software interface for managing vehicles and repairers. At the top, it displays 'Policy Number POL0001' and 'Vehicle Number POL0001-001030'. On the left, there's a table titled 'Vehicles' with columns 'Make' and 'Model'. Two rows are shown: one for a 'Mercedes E-Class' and another for a 'Cadillac Escalade'. The 'Mercedes' row has a radio button next to 'Mercedes' which is checked. The 'Cadillac' row has a radio button next to 'Cadillac' which is unchecked. In the center, a modal dialog box is open under the heading 'Available Repairers'. It contains a table with four rows, each with a checkbox next to the repairer's name and their address. The repairers listed are: Athelstan Prestige Cars (McLeod Drive, Las Vegas), Flying Monk Coachworks (Hacienda Ave, Las Vegas), Rose and Crown Autos (Russell Road, Las Vegas), and Sound Effects Garage (West Flamingo Road, Las Vegas). Below this table is a button labeled '+ Add Selected'. At the bottom of the modal, there are two buttons: 'Cancel' and 'Confirm Selections', with 'Confirm Selections' being disabled. To the right of the modal, there's a table with columns 'Plate' and 'Zip'. It shows two entries: 'GIL1057' with '89101' and 'X865PHX' with '80911'. At the top right of the interface, there are 'Save' and 'Cancel' buttons.

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) :-

This screenshot shows the same software interface after changing the selected vehicle. The 'Mercedes E-Class' row in the 'Vehicles' table now has its radio button unchecked, while the 'Cadillac Escalade' row has its radio button checked. The modal dialog box for 'Available Repairers' has been updated to show three repairers located in Colorado Springs: Alfred Bodyworks, Le Tissier Fixers, and Mary Rose AutoTech. The 'Add Selected' button is now enabled. The rest of the interface, including the 'Selected Repairers' section and the table on the right, remains the same as in the previous screenshot.

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

Available Repairers

	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
------	---------

x 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

	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	

x Cancel**✓ Confirm Selections**

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

 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	X
Athelstan Prestige Cars	McLeod Drive, Las Vegas	
Flying Monk Coachworks	Hacienda Ave, Las Vegas	

X 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) :-

Claim Number POL0001-001030 Policy Number POL0001

Vehicles		Available Repairers		Plate	
Make	Model	Name	Address	Plate	Plate
<input type="radio"/> Mercedes	E-Class	Alfred Bodyworks	Constitution Ave, Colorado Springs	GIL1057	
<input checked="" type="radio"/> Cadillac	Escalade	Le Tissier Fixers	East La Salle St, Colorado Springs	X865PHX	
		Mary Rose AutoTech	Palmer Park Blvd, Colorado Springs		

+ Add Selected

Selected Repairers	
Name	Address
Alfred Bodyworks	Constitution Ave, Colorado Springs
Le Tissier Fixers	East La Salle St, Colorado Springs

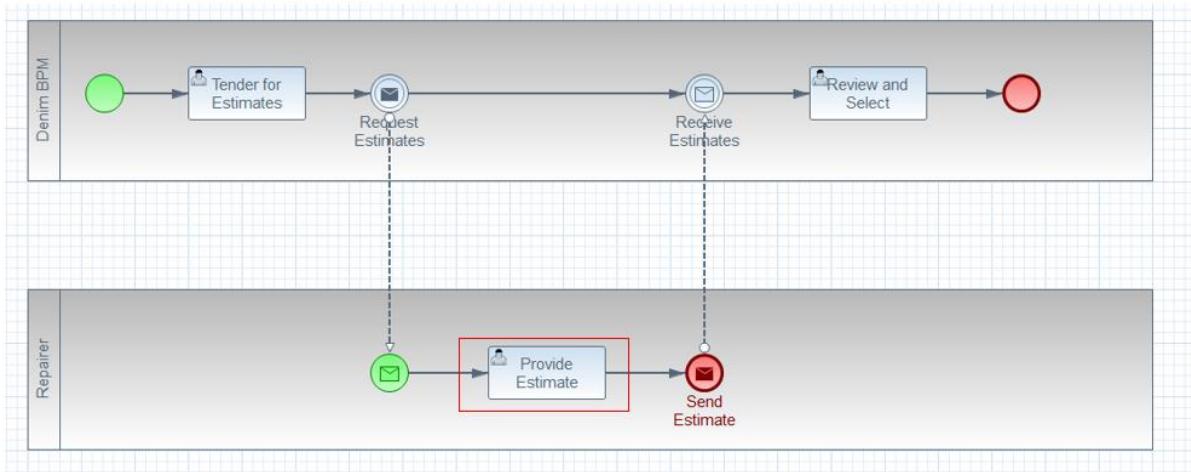
Now the Complete button becomes enabled and the user Completes the work item :-

Claim Number POL0001-001030 Policy Number POL0001

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

(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) :-

The screenshot shows the Work Coach interface. On the left, there's a sidebar with a user profile for 'deadmin', 'Edit Profile', and 'Log Out'. Below that is a navigation menu with sections like 'Dashboards', 'Work' (selected), 'Processes', 'Process Performance', 'Team Performance', 'Launch', 'Advanced HR Open New Position', 'Discover UI', and 'MyProcess'. The main area is titled 'Work ...' and contains a search bar 'Enter search text...'. A list of work items is displayed:

- 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) :-

The screenshot shows the details of the first work item: 'Athelstan Prestige Cars - Provide Estimate for Mercedes E-Class'. The top header includes the title, claim number (POL0001-001030), policy number (POL0001), and three buttons: 'Save', 'Complete', and a more options menu. The form is divided into sections:

- Vehicle for Repair:** Displays vehicle details: Make (Mercedes), Model (E-Class), Plate (GIL1057), State (NV), Zip (89101), Year (2017), and VIN (VIN111-222-333). It also has 'Check History' and 'View Damage' buttons.
- Repair Estimate:** Contains fields for Labor Cost (0.00), Tax Percentage (0), and Total Estimate (0.00). Below this is a 'Parts' section with a table header: SKU, Description, Quantity, and Unit Price. At the bottom are 'Search and Add Part' and 'View Diagram' buttons.

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		

[Check History](#) [View Damage](#)

Vehicle Damage

Title	Type
SampleVideo1.mp4	Video
vehicle-damage-GIL1057.jpg	Image



Fit to height Fit to width Open in new window

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		

[Check History](#) [View Damage](#)

Repair Estimate

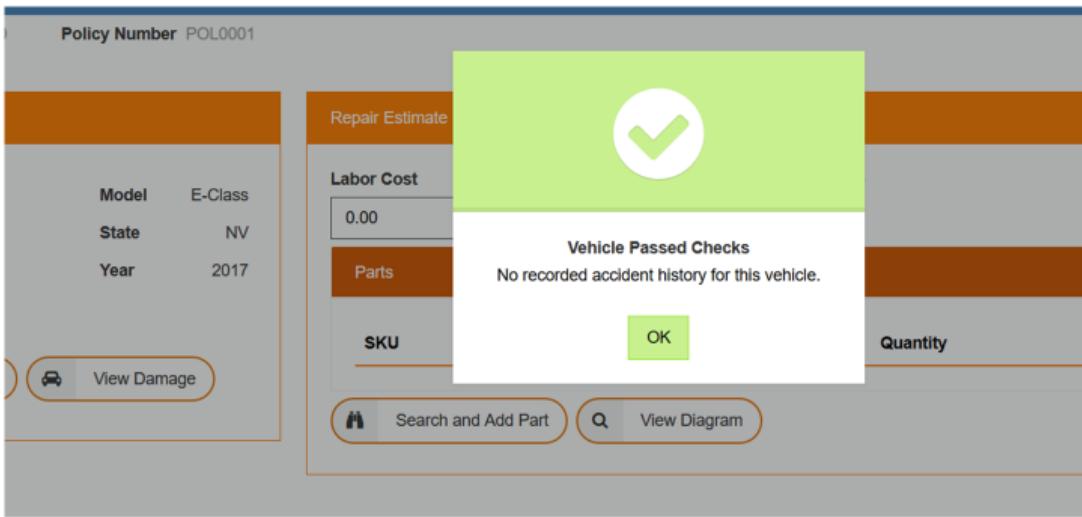
Labor Cost	Tax Percentage	Total Estimate
0.00	0	0.00

Parts

SKU	Description

[Search and Add Part](#) [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 :-

Vehicle Details	Value
Make	Cadillac
Plate	X865PHX
Zip	80911
VIN	VNBK16E01G123456
Model	Escalade
State	CO
Year	2016

Overview	
2004 (04 reg)	SUV
Automatic	95,000 miles
Petrol	6.0L
5 doors	5 seats
VIN: VNBK16E01G123456	
Tire	18.00
City MPG	26.00/31
Highway MPG	30.00/40
Anti-lock Brakes	4-Wheel ABS
Steering Type	Power, Power Rack
Front Brake Type	Disc
Rear Brake Type	Drum
Tires	185/55R15
Power Door Locks	
Vehicle Anti-Theft	

NEW JERSEY TITLE				
VIN	XXXXXXXXXXXXXX			
Title Issue Date	10/22/2014			
Odometer	14,374 M			
Please note: The odometer reading provided is as of the issuing date and does not represent the current odometer reading.				
• If you would like additional information regarding the title from this jurisdiction, please click here .				
1 previous title found				
State	VIN	Issued On	Odometer	DMV Link
NJ	XXXXXXXXXXXXXXXXXXXX	4 M	04/08/2013	click here

(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) :-



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		

[Check History](#) [View Damage](#)

Repair Estimate		
Labor Cost	Tax Percentage	Total Estimate
0.00	0	0.00
Parts		
SKU	Description	Quantity
Search and Add Part View Diagram		

Athelstan Prestige Cars - Provide Estimate for Mercedes E-Class

Policy Number POL0001

Model E-Class	State NV	Year 2017
---------------	----------	-----------

[View Damage](#)

The diagram shows a cross-section of a Mercedes-Benz E-Class car with various parts labeled: Tail Lights, Cabin Air Filter, Check Engine Light On, Wiper Blades, Power Steering Fluid, Spark Plugs, Belts, Windshield Washer Lights, Cleaning and Polishing, Fuel Filter, Exhaust System, Chassis Lubrication, Suspension, Brakes, Tire Inflation and Condition, Battery and Cables, Engine Air Filter, Hoses, Oxygen Sensor, Check Oil, Engine Oil Filter, Coolant (Antifreeze), and Automatic Transmission Fluid.

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 :-

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		

[Check History](#) [View Damage](#)

Repair Estimate		
Labor Cost	Tax Percentage	Total Estimate
0.00	0	0.00
Parts		
SKU	Description	Quantity
Search and Add Part View Diagram		

We are presented with a popup dialogue :-

The screenshot shows a user interface for adding a part. It consists of several input fields and two buttons at the bottom.

- * SKU**: An input field with an orange search icon on the left. It has a red asterisk indicating it is required.
- * Description**: An input field with an orange search icon on the left. It has a red asterisk indicating it is required.
- Unit Price**: An input field with an orange search icon on the left.
- * Quantity**: An input field with an orange search icon on the left. It has a red asterisk indicating it is required.

At the bottom are two buttons:

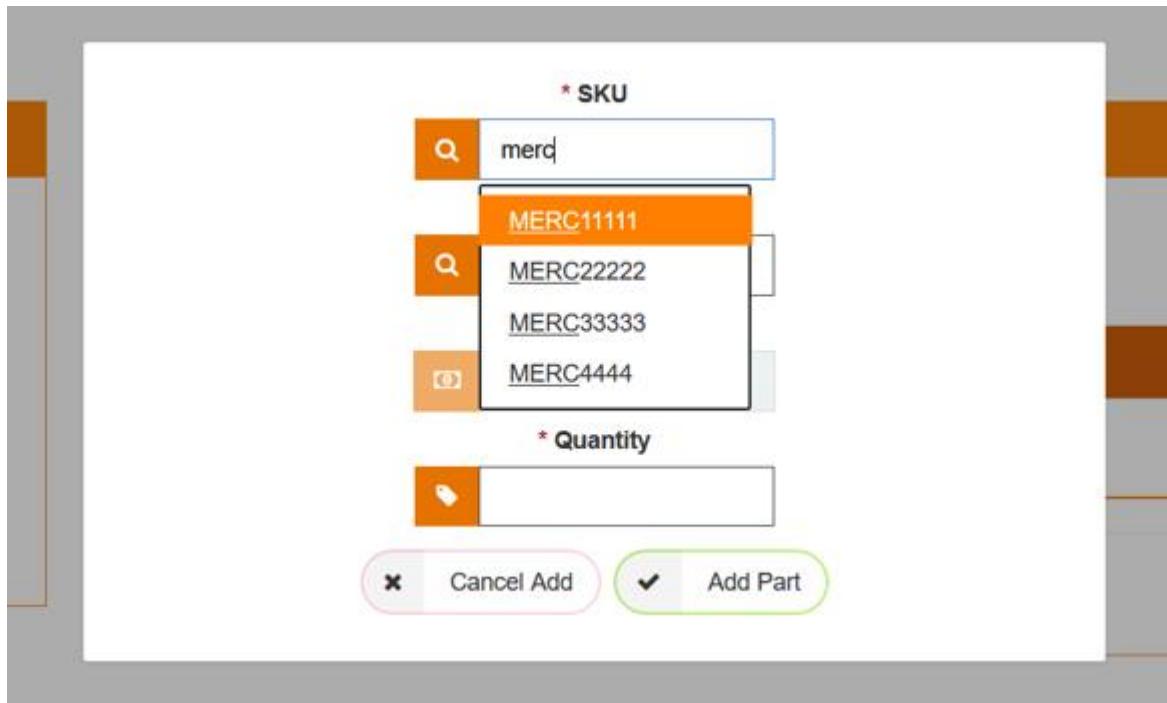
- Cancel Add**: A button with a red outline and a red 'X' icon.
- Add Part**: A button with a green outline and a green checkmark icon.

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

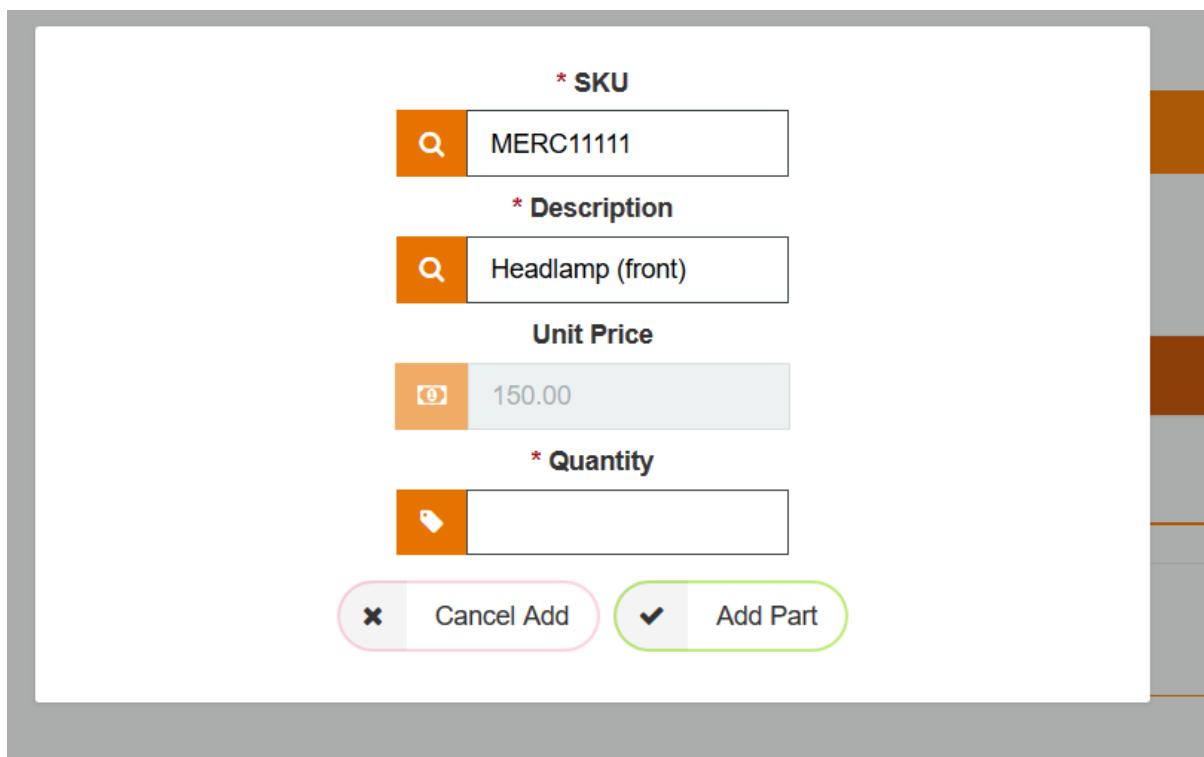
This screenshot shows the same dialog as above, but now all four input fields (SKU, Description, Unit Price, and Quantity) have validation errors. Each field has a red border and a red 'X' icon on the right side. A black speech bubble above the first field says "Please select a part SKU".

The other elements of the dialog remain the same as in the first screenshot.

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 :-



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



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

The screenshot shows a mobile application interface for adding parts. At the top, there is a search bar labeled "SKU" with a magnifying glass icon. Below it is a search bar labeled "Description" with a magnifying glass icon, containing the partial text "he|". A dropdown menu is open, showing two results: "Headlamp (front)" and "Head gasket". Below the search bars is a field labeled "Quantity" with a tag icon, currently empty. At the bottom are two buttons: "Cancel Add" (pink background) and "Add Part" (green background).

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

The screenshot shows a mobile application interface for adding parts. It includes fields for "SKU" (MERC11111), "Description" (Headlamp (front)), and "Unit Price" (150.00). A validation message "Maximum quantity is 2" appears above the "Quantity" field, which contains the value "3". The "Add Part" button at the bottom is highlighted in green.

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

Model	E-Class	Tax Percentage	Total Estimate
State	NV	0	300.00
Year	2017		

Repair Estimate

Parts

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

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

*** SKU**

*** Description**

Unit Price

*** Quantity**

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

Labor Cost	Tax Percentage	Total Estimate
250.00	15	632.50

Parts

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

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

Athelstan Prestige Cars - Provide Estimate for Mercedes E-Class

Number POL0001

Model E-Class
State NV
Year 2017
Damage

Repair Estimate

Labor Cost	Tax Percentage	Total Estimate 1948.10	
Parts			
SKU	Description	Quantity	Unit Price
MERC11111	Headlamp (front)	2	150
MERC22222	Grill assembly	1	389
MERC33333	Hood / bonnet	1	755

Save Complete

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

deadmin Edit Profile Log Out

Enter search text...

Dashboards Create Saved Search

Work

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
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

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

Le Tissier Fixers - Provide Estimate for Cadillac Escalade

Claim Number POL0001-001030 Policy Number POL0001

Vehicle for Repair

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

* SKU

CODY11111
CODY22222
CODY33333
CODY4444

* Quantity

Save Complete

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

Vehicle for Repair			
Make	Mercedes	Model	E-Class
Plate	GIL1057	State	NV
Zip	89101	Year	2017
VIN	VIN111-222-333		
<input type="button" value="Check History"/> <input type="button" value="View Damage"/>			

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"/>
MERC4444	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

Vehicle for Repair			
Make	Cadillac	Model	Escalade
Plate	X865PHX	State	CO
Zip	80911	Year	2016
VIN	VIN444-555-666		
<input type="button" value="Check History"/> <input type="button" value="View Damage"/>			

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"/>

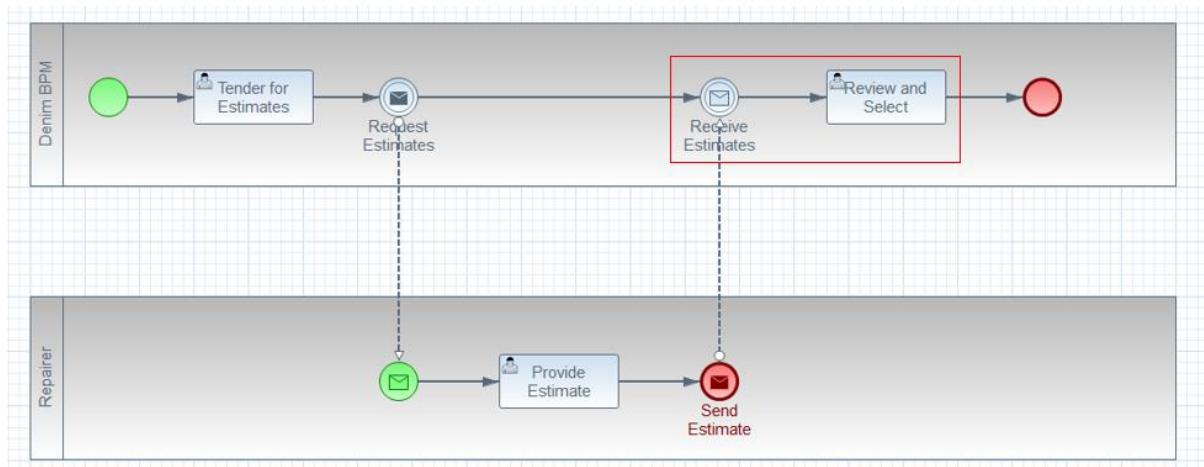
Alfred Bodyworks - Provide Estimate for Cadillac Escalade

Claim Number POL0001-001030 Policy Number POL0001

Vehicle for Repair			
Make	Cadillac	Model	Escalade
Plate	X865PHX	State	CO
Zip	80911	Year	2016
VIN	VIN444-555-666		
<input type="button" value="Check History"/> <input type="button" value="View Damage"/>			

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"/>
CADY5555	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 :-

Make	Model	State	Year
Mercedes	E-Class	NV	2017

Make	Model	State	Year
Cadillac	Escalade	CO	2016

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) :-

Make	Model	State	Year
Mercedes	E-Class	NV	2017

Make	Model	State	Year
Cadillac	Escalade	CO	2016

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																
<input type="radio"/>	Athelstan Prestige Cars	1948.1	250	15	<table border="1"> <thead> <tr> <th>Sku</th><th>Description</th><th>Quantity</th><th>Unit Price</th></tr> </thead> <tbody> <tr> <td>MERC11111</td><td>Headlamp (front)</td><td>2</td><td>150</td></tr> <tr> <td>MERC22222</td><td>Grill assembly</td><td>1</td><td>389</td></tr> <tr> <td>MERC33333</td><td>Hood / bonnet</td><td>1</td><td>755</td></tr> </tbody> </table>	Sku	Description	Quantity	Unit Price	MERC11111	Headlamp (front)	2	150	MERC22222	Grill assembly	1	389	MERC33333	Hood / bonnet	1	755
Sku	Description	Quantity	Unit Price																		
MERC11111	Headlamp (front)	2	150																		
MERC22222	Grill assembly	1	389																		
MERC33333	Hood / bonnet	1	755																		
<input type="radio"/>	Flying Monk Coachworks	1006.32	335	<table border="1"> <thead> <tr> <th>Sku</th><th>Description</th><th>Quantity</th><th>Unit Price</th></tr> </thead> <tbody> <tr> <td>MERC11111</td><td>Headlamp (front)</td><td>1</td><td>150</td></tr> <tr> <td>MERC22222</td><td>Grill assembly</td><td>1</td><td>389</td></tr> <tr> <td>MERC4444</td><td>Fastening bolts</td><td>50</td><td>0.49</td></tr> </tbody> </table>	Sku	Description	Quantity	Unit Price	MERC11111	Headlamp (front)	1	150	MERC22222	Grill assembly	1	389	MERC4444	Fastening bolts	50	0.49	
Sku	Description	Quantity	Unit Price																		
MERC11111	Headlamp (front)	1	150																		
MERC22222	Grill assembly	1	389																		
MERC4444	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	<input type="button" value="Save"/>	<input checked="" type="button" value="Complete"/>																	
Insured Vehicle																					
Make Mercedes	Model E-Class																				
Plate GL1057	State NV																				
Zip 89101	Year 2017																				
VIN VIN111-222-333																					
Insured Vehicle Estimates																					
Repairers																					
	Name	Total Cost	Labor Cost	Tax Percentage	Parts List																
<input type="radio"/>	Athelstan Prestige Cars	1948.1	250	15	<table border="1"> <thead> <tr> <th>Sku</th><th>Description</th><th>Quantity</th><th>Unit Price</th></tr> </thead> <tbody> <tr> <td>MERC11111</td><td>Headlamp (front)</td><td>2</td><td>150</td></tr> <tr> <td>MERC22222</td><td>Grill assembly</td><td>1</td><td>389</td></tr> <tr> <td>MERC33333</td><td>Hood / bonnet</td><td>1</td><td>755</td></tr> </tbody> </table>	Sku	Description	Quantity	Unit Price	MERC11111	Headlamp (front)	2	150	MERC22222	Grill assembly	1	389	MERC33333	Hood / bonnet	1	755
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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 :-

Other Vehicle Estimates																					
Repairers																					
	Name	Total Cost	Labor Cost	Tax Percentage	Parts List																
<input type="radio"/>	Alfred Bodyworks	1966.8	750	20	<table border="1"> <thead> <tr> <th>Sku</th><th>Description</th><th>Quantity</th><th>Unit Price</th></tr> </thead> <tbody> <tr> <td>CADY11111</td><td>Taillight (back)</td><td>1</td><td>150</td></tr> <tr> <td>CADY22222</td><td>Bumper assembly</td><td>1</td><td>389</td></tr> <tr> <td>CADY5555</td><td>Rear windshield</td><td>1</td><td>350</td></tr> </tbody> </table>	Sku	Description	Quantity	Unit Price	CADY11111	Taillight (back)	1	150	CADY22222	Bumper assembly	1	389	CADY5555	Rear windshield	1	350
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CADY11111	Taillight (back)	1	150																		
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CADY5555	Rear windshield	1	350																		
<input type="radio"/>	Le Tissier Fixers	1252.9	450	<table border="1"> <thead> <tr> <th>Sku</th><th>Description</th><th>Quantity</th><th>Unit Price</th></tr> </thead> <tbody> <tr> <td>CADY11111</td><td>Taillight (back)</td><td>2</td><td>150</td></tr> <tr> <td>CADY22222</td><td>Bumper assembly</td><td>1</td><td>389</td></tr> </tbody> </table>	Sku	Description	Quantity	Unit Price	CADY11111	Taillight (back)	2	150	CADY22222	Bumper assembly	1	389					
Sku	Description	Quantity	Unit Price																		
CADY11111	Taillight (back)	2	150																		
CADY22222	Bumper assembly	1	389																		

Then selecting the preferred one :-

① Le Tissier Fixers	1252.9	450	10	<table border="1"> <thead> <tr> <th>Sku</th><th>Description</th><th>Quantity</th><th>Unit Price</th></tr> </thead> <tbody> <tr> <td>CADY11111</td><td>Taillight (back)</td><td>2</td><td>150</td></tr> <tr> <td>CADY22222</td><td>Bumper assembly</td><td>1</td><td>389</td></tr> </tbody> </table>	Sku	Description	Quantity	Unit Price	CADY11111	Taillight (back)	2	150	CADY22222	Bumper assembly	1	389
Sku	Description	Quantity	Unit Price													
CADY11111	Taillight (back)	2	150													
CADY22222	Bumper assembly	1	389													

.. and the total damage is set (plus Complete option is now enabled) :-

Step: Review and Select Estimate

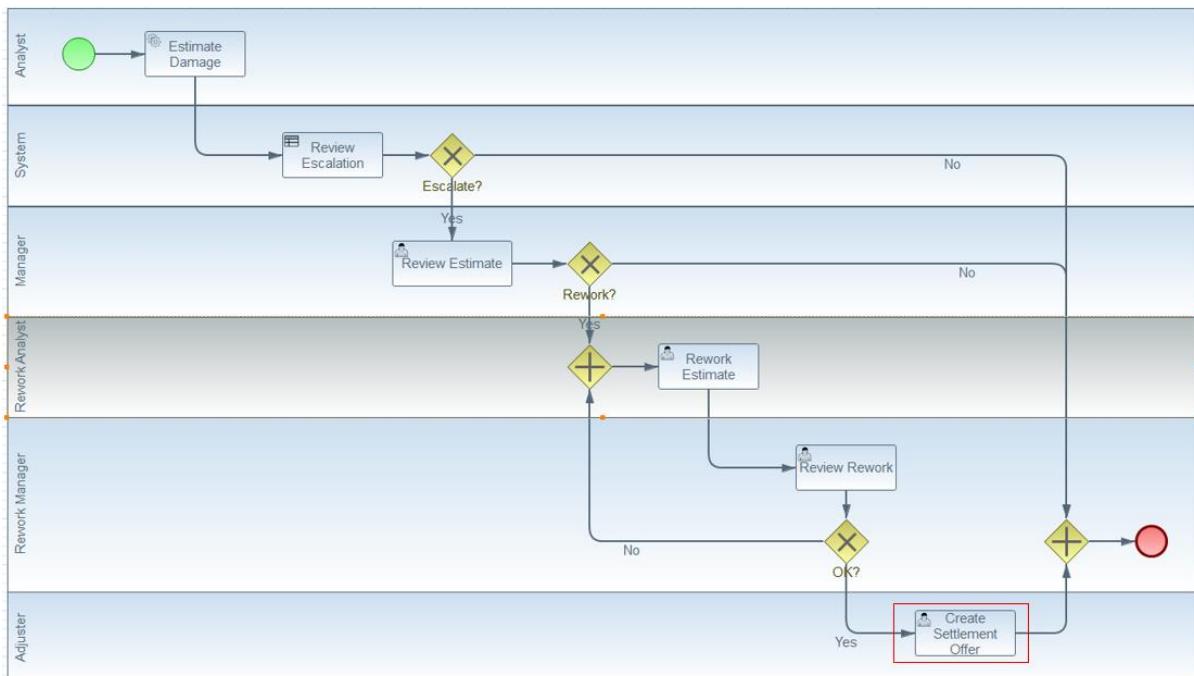
Claim Number POL0001-001030 Policy Number POL0001 Damages Estimate Amount 3201

Save Complete

Insured Vehicle

Make Mercedes Model E-Class
Plate GIL1057 State NV

They now can Complete the review with these preferred repairers set and the workflow proceeds, in MVP the ODM service does not determine than any escalation is necessary so it can proceed to settlement. We are now here in the workflow (within the Loss Assessment sub-process) :-



The Process Portal displays a new work item for Create Settlement Offer :-

dadmin Edit Profile Log Out

Enter search text...

Work

Task Subject: Step: Create Settlement Offer Instance name: Initiate Claims Processing:2726 Task status: Received

Dashboards Work Processes Process Performance

Opening the item we see that it shows the damage estimate information provided in previous activity (Complete is not enabled until required fields have non-default values) :-

Step: Create Settlement Offer

Claim Number POL0001-001030	Policy Number POL0001	Damages Estimate Amount 3201	<input type="button" value="Save"/> <input checked="" type="button" value="Complete"/>		
Insured Vehicle		Other Vehicle			
Make Mercedes	Model E-Class	Plate GIL1057	Make Cadillac	Model Escalade	Plate X865PHX
Assessed Condition			Assessed Condition		
Damage Amount 1,948	Adjustment Factor 100%	Adjusted Amount 1,948	Damage Amount 1,253	Adjustment Factor 100%	Adjusted Amount 1,253
Claim Settlement					
* Policy Mandatory Excess 0		Policy Voluntary Excess 0		Claim Settlement Amount 3,201	<input type="checkbox"/> Cash Settlement?
* Claim Settlement Comments					

The Adjuster considers the information (in reality they would also access case documents here to review the report, policy 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	Make Cadillac	Model Escalade	
Assessed Condition			Assessed Condition		
Damage Amount 1,948	Adjustment Factor 80%	Adjusted Amount 1,558	Damage Amount 1,253	Adjustment Factor []	
Claim Settlement					
* Policy Mandatory Excess 0		Policy Voluntary Excess 0		Claim Settlement Amount 2,811	<input type="checkbox"/> Cash Settlement?
* 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 :-

The screenshot shows the 'Claim Settlement' section of a claim management system. It displays two vehicle details: 'Insured Vehicle' (Mercedes E-Class, GIL1057) and 'Other Vehicle' (Cadillac Escalade, X865PHX). Under 'Assessed Condition' for the insured vehicle, there is a note about Tyres being legal but with thread depth low on nearside front, and the braking system being adequate. A tooltip indicates that the 'Adjustment Factor must be between 1 and 100 (%)'. Below this, the 'Damage Amount' is 1,948, the 'Adjustment Factor' is set to 110% (highlighted with a red border), and the 'Adjusted Amount' is 2,143.

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

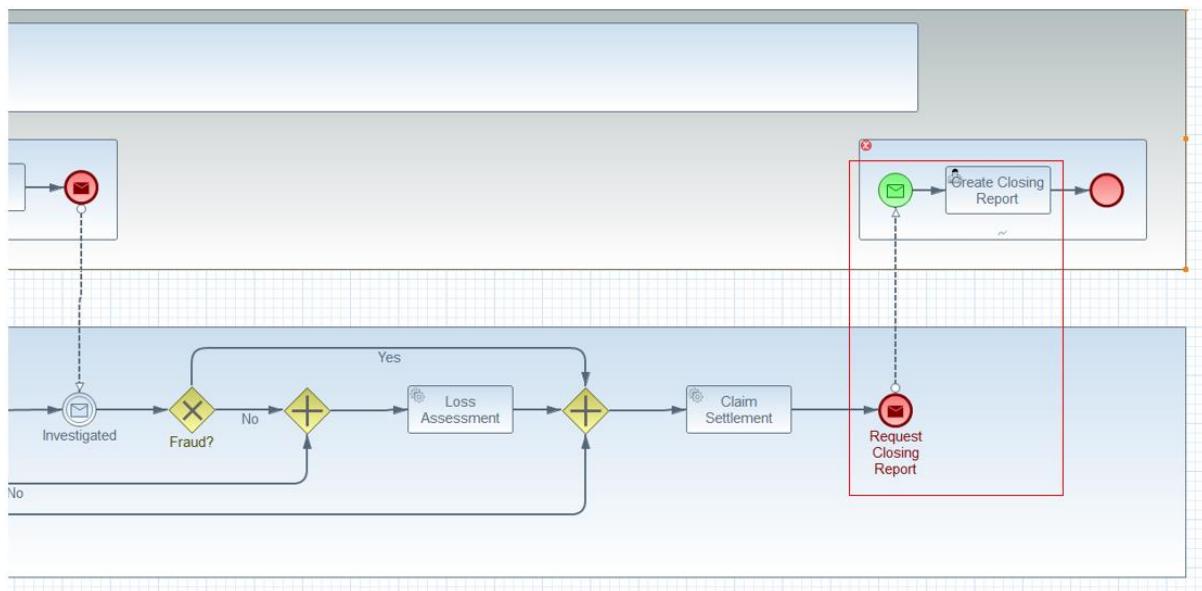
The screenshot shows the 'Step: Create Settlement Offer' screen. It includes the same vehicle details and assessment notes as the previous screenshot. In the 'Claim Settlement' section, the 'Policy Mandatory Excess' is 250, 'Policy Voluntary Excess' is 100, and 'Claim Settlement Amount' is 2,461. The 'Cash Settlement?' checkbox is checked. A note states: 'Insured vehicle adjusted based on existing condition, therefore full repair costs not covered in that case'. The 'Complete' button at the top right is highlighted with a red box.

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

The screenshot shows the 'IBM Business Automation Workflow Case Client' interface. The 'Work' tab is selected. The main area displays a table of work items:

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 <table border="1"> <tr> <td>Claim Number</td> <td>POL0001-001030</td> <td>Claim Status</td> <td></td> </tr> <tr> <td>Date Reported</td> <td>12/07/2019</td> <td>Policy Number</td> <td>POL0001</td> </tr> <tr> <td>Policy Effective Date</td> <td>01/03/2019</td> <td>Policy Expiration Date</td> <td>29/02/2020</td> </tr> <tr> <td>* Coverage</td> <td>Premium</td> <td>Date Of Last Claim</td> <td>31/12/2018</td> </tr> <tr> <td>Claim Outcome</td> <td></td> <td>Policy Status</td> <td>Active</td> </tr> <tr> <td>* Damage Amount</td> <td>3,201</td> <td>* Monthly Premium</td> <td>99</td> </tr> <tr> <td colspan="2"></td> <td>* Claim Settlement Amount</td> <td>2,461</td> </tr> <tr> <td colspan="4"> Claim Settlement Comments Insured vehicle adjusted based on existing condition, therefore full repair costs not covered in that case </td> </tr> </table>				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			
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		* 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	deadmin	16/07/2019 12:54
Damages Evidence	deadmin	16/07/2019 12:54
Police Accident Report	deadmin	16/07/2019 12:54
Repair Estimates and Invoices	deadmin	16/07/2019 12:54
autoClaim.json	deadmin	16/07/2019 13:17

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

```
autoClaim.json
[{"claimNumber": "POL0001-001080",
 "policyNumber": "POL0001",
 "lossDamageDescription": "Collision",
 "damageEstimateAmount": 3261,
 "claimSettlementAmount": 3461,
 "claimSettlementComments": "Insured vehicle repair adjusted to take into account adverse condition",
 "insuredVehicle": {
   "make": "Mercedes",
   "model": "E-Class",
   "year": "2017",
   "vin": "V1W111-222-333",
   "plate": "GL1057",
   "state": "NV",
   "zip": "89101",
   "condition": "Tyres - legal but thread depth low on nearside front, braking system - adequate, offside front headlamp defective, hood showing excessive signs of water damage",
   "damageAmount": 1948,
   "repairerList": [
     {
       "repairerCode": "AthePres1",
       "repairerName": "Athelstan Prestige Cars",
       "isSelectedRepairer": true,
       "laborCost": 250,
       "taxPercentage": 15,
       "totalCost": 1948.1,
       "partsList": [
         {
           "sku": "MERC11111",
           "description": "Headlamp (front)",
           "quantity": 2,
           "maxQuantity": 2,
           "quantityUnits": 1,
           "unitPrice": 150
         },
         {
           "sku": "MERC22222",
           "description": "Grill assembly",
           "quantity": 1,
           "maxQuantity": 1,
           "quantityUnits": 1,
           "unitPrice": 385
         },
         {
           "sku": "MERC33333",
           "description": "Front bumper bar",
           "quantity": 1,
           "maxQuantity": 1,
           "quantityUnits": 1,
           "unitPrice": 150
         }
       ]
     }
   ]
 }
```

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 

Create Closing Report | Create Closing Report

[Comments](#)

[Claim](#) [Documents](#)

[View Instructions](#)

[Complete](#) [Save](#) [Close](#)

*** 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 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 

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 :-

[Cases](#)[Work](#)

Auto Claim Case Details

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 License Number	LIC-010101
Employment Status	Employed
Insured E-mail	jenform@gmail.com
Insured Street	Las Vegas Blvd
Insured State	NV
Insured Monthly Income	8,500

Insured LName	Formby
Insured DoB	05/11/1984
Insured Marital Status	Divorced
Education	Bachelor
Insured Phone	123-456-789
Insured City	Las Vegas
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 Year	2017
Purpose of Use	Driving for Employer
Vehicle VIN	VIN111-222-333
Vehicle Model	E-Class
Vehicle Plate	GIL1057
Vehicle State	NV
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 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 Model	E-Class
Vehicle Year	2017
* Purpose of Use	Driving for Employer
Vehicle Context	Moving
* Vehicle Plate	GIL1057
* Vehicle State	NV
* Vehicle ZIP	89101
* Vehicle VIN	VIN111-222-333
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		

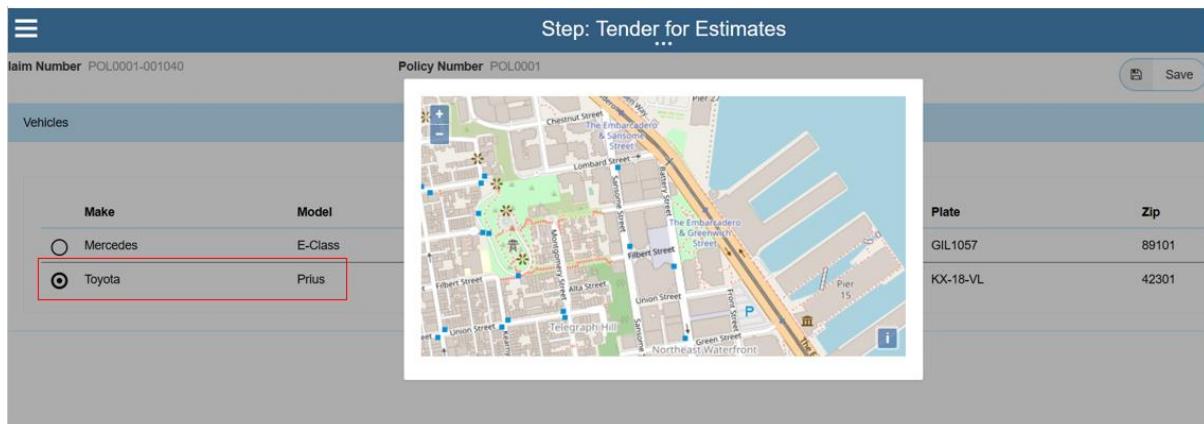
If you do not choose these Vehicle options you just get default behaviour in sections of the solution as follows ...

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

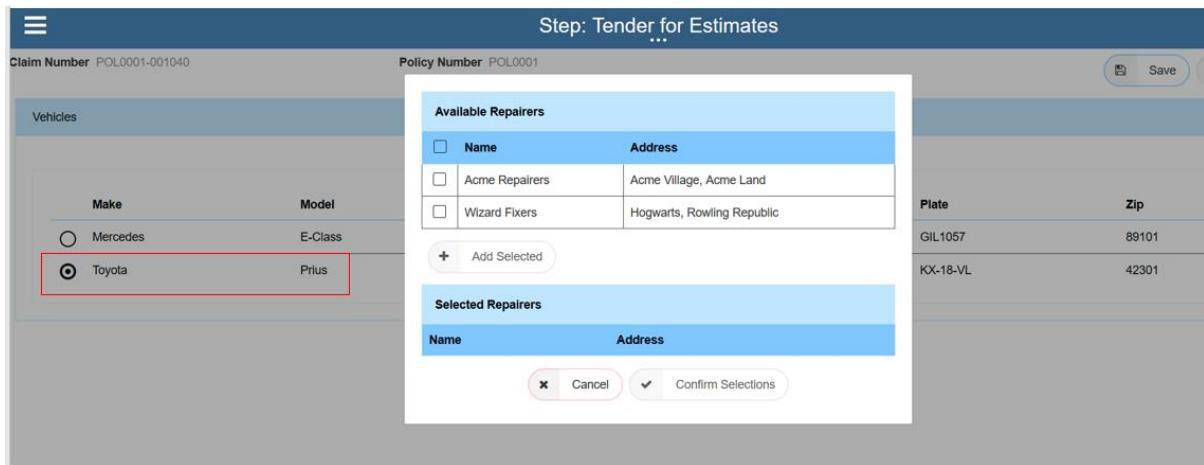
▼ Other Vehicle

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		

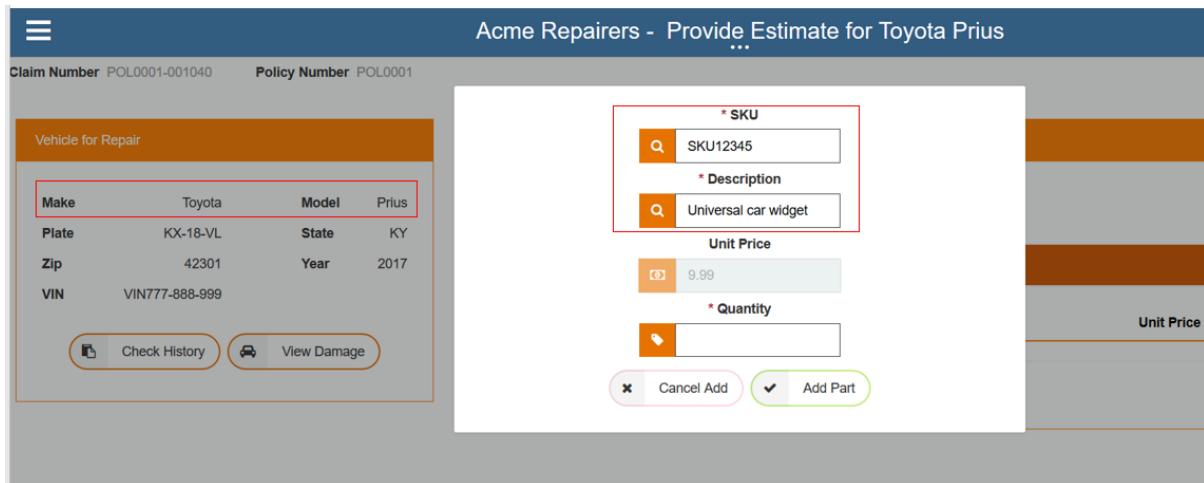
When you reach the work item to Tender for Estimates the car location map just picks up a default place (the HQ of Levi Straus given their association with denim) :-



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.