

# Case Management User Guide

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## Introduction

The Appian Case Management (CM) application is a framework that contains sample implementations of typical CM use cases. It is meant to accelerate your deployment with reusable components and complete pre-built solutions that can be adjusted to fit your organization's needs.

Pre-built solutions include a Order Management module, a Customer Service module and an Investigations module.

The implementation follows Appian best practices for application design and execution and is meant to be an evolving product. It has no dependencies and thus stands on its own. New releases of the CM app will include improvements, enhancements and even new functionality.

## Main Tempo Application Components

The Case Management application takes advantage of the Tempo end user interface to provide a unified, easy and intuitive interface. The following is a description of the main components contained under the Records, Reports, and Actions tabs.

### **Records**

Customers

Products

Orders

Service Requests

Investigation <Preview>

## Actions

Create New Customer

Create New Product

Create New Order

Create New Service Request

Create New Investigation

## Reports

Customers Dashboard

Products Dashboard

Orders Dashboard

Service Request Dashboard

Investigation Dashboard

## Application Use Cases

Currently, the Case Management application includes the following use cases:

- **Order Management.** An implementation of order management that includes the ability to create, edit, review and complete orders for products offered. Meant to cover the [\*Process To Decision\*](#) use case.
- **Service Request.** Satisfies customer service requests, which can be made within the context of a Customer, Order, or a general request. Meant to cover the [\*Service Request\*](#) use case.
- **Investigations.** A preview module. New investigation cases can be launched and defined in a completely Ad-Hoc fashion, capturing details, milestones, collaborators, documents and related records. This is a preview release. A subsequent version of the Case Management app, will contains significant updates. Meant to cover the [\*Investigative\*](#) style cases.

**Order Management**

**Service Request**

**Investigations <Preview>**

# Appendix 1: Case Management Use Cases

## **Process to decision**

The purpose of these cases is to make a decision, supported by a well-known set of rules or policies, which can change frequently and might even be regulated. These case types are usually more structured than others. The workflow is predictable and can be designed ahead of time into a solution.

## **Service Request**

As the name implies, these cases are focused on the successful resolution of a request for service. There is typically a contractual or otherwise implied expectation or obligation to satisfy the request within a certain timeframe. Service request cases are also well structured, and progress on a series of known actions that are well established. While the number of possible actions are large, the case worker, with the help of the system, decide what is the best course of action. Workflows can be large and complex and are critical to successful resolution of the case.

## **Investigations**

These cases tend to be very focused on data, and their workflow component is very ad-hoc. Often, data is captured as part of the initial capture of case details, which is reviewed, and investigated, often leading to more data being required. Meanwhile, associations are made between the data obtains during this case and perhaps from other investigation cases, which are also evaluated and acted upon. Case progress is very ad-hoc and based on events and milestones.