

FormKiQ

Case Management Architecture Guide

FormKiQ Case Management uses a customer-controlled AWS deployment model to manage case records, related documents, metadata, tasks, workflows, search, AI-assisted review, and governance across structured case lifecycles.

Architecture Principles

- Deployed into the customer's AWS environment for controlled ownership
- Uses AWS-native storage, metadata, search, workflow, and AI services
- Supports structured case lifecycle governance, task coordination, evidence handling, and auditability
- Configurable case schemas and workflow rules enable adaptation to different case types and service processes



Case Management Flow



1. Ingest

Cases enter FormKiQ through the web console, API, email, forms, integrations, or other intake channels.

2. Store

Case documents are stored in Amazon S3, while metadata, entities, case status, and workflow state are managed in FormKiQ's metadata layer.

3. Classify

Cases are classified by type, priority, department, program, requester, status, or other schema-driven fields, using manual, rule-based, or AI-assisted methods.

4. Extract

OCR and AI processing identify key information from submitted documents, correspondence, forms, and evidence to support case review and decision-making.

5. Govern

Lifecycle rules, assignments, access controls, audit events, retention policies, and disposition rules are applied to the case record and related entities.

6. Search

Users can search by full text, metadata, case type, requester, status, priority, assigned team, or other custom schema fields.

7. Act

Workflow actions, task assignment, notifications, escalations, reporting updates, and downstream system integrations can be triggered from case events.

Customer-Controlled Deployment and Security Model

Customer AWS Account Deployment

- Deployed into the customer's AWS environment
- Customer-owned data stores
- Repeatable deployment and updates through AWS CloudFormation

Data Residency and Isolation

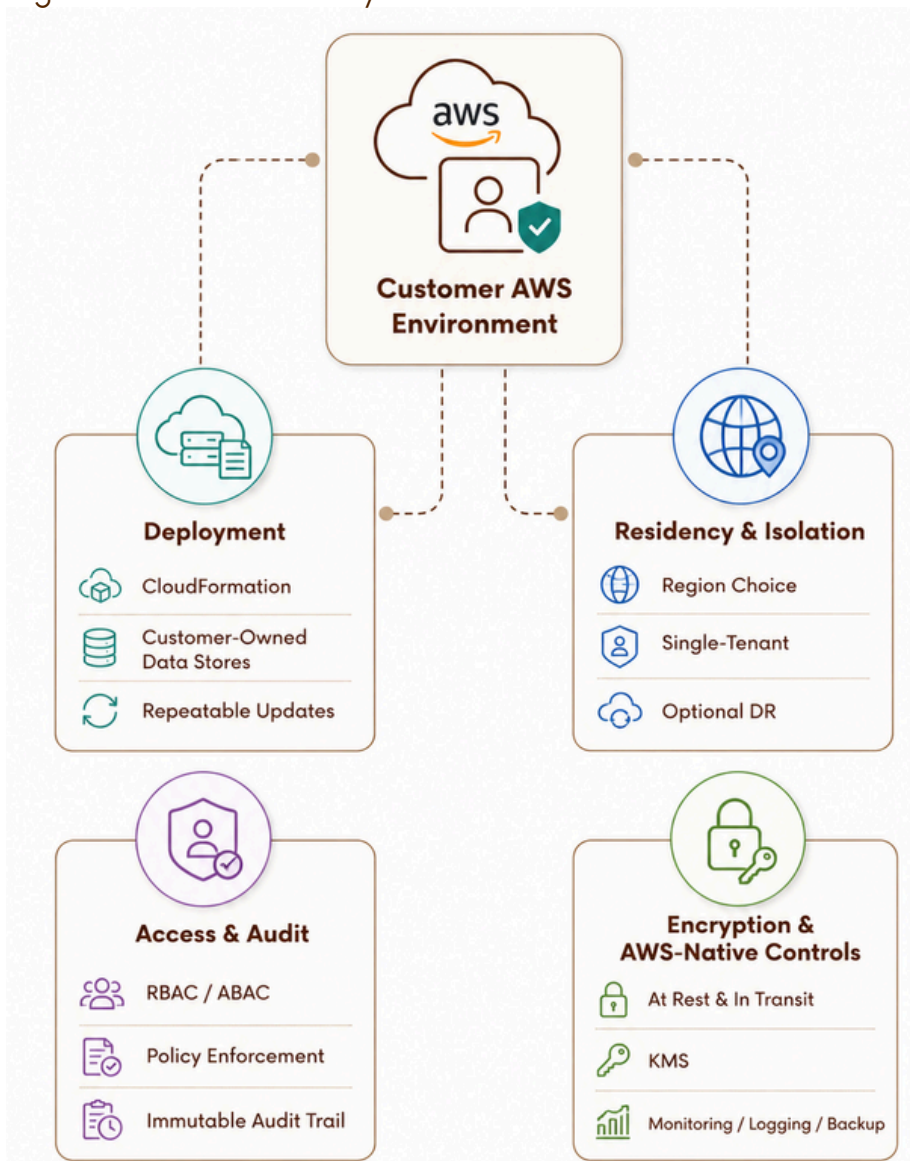
- Deployment region selected by customer requirements
- Single-tenant architecture for strong segregation
- Optional regional disaster recovery patterns

Access Control and Auditability

- Role-based and attribute-based access controls
- API-level policy enforcement
- Immutable audit trail for document, metadata, workflow, and user activity

Encryption and AWS-Native Controls

- Encryption at rest and in transit
- AWS KMS support for key management
- Compatible with AWS monitoring, logging, backup, and security services



Case Management Capabilities Enabled by the Architecture

Capability	Architecture Support
Case repository	Amazon S3, DynamoDB, FormKiQ metadata model
Case intake and document capture	Web console, API, connectors, Amazon S3, Textract
Case classification and routing	Structured metadata, entities, workflow rules, AI-assisted classification
Task assignment and review workflows	FormKiQ workflow engine, AWS application integration
Search and discovery	OpenSearch, metadata search, full-text indexing
Audit and governance	Activity history, access controls, retention policies
Integration with enterprise systems	API-first platform, event-driven processing, connectors

Next Step

Review your case intake, workflow, governance, AWS deployment, and integration requirements with the FormKiQ team.

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