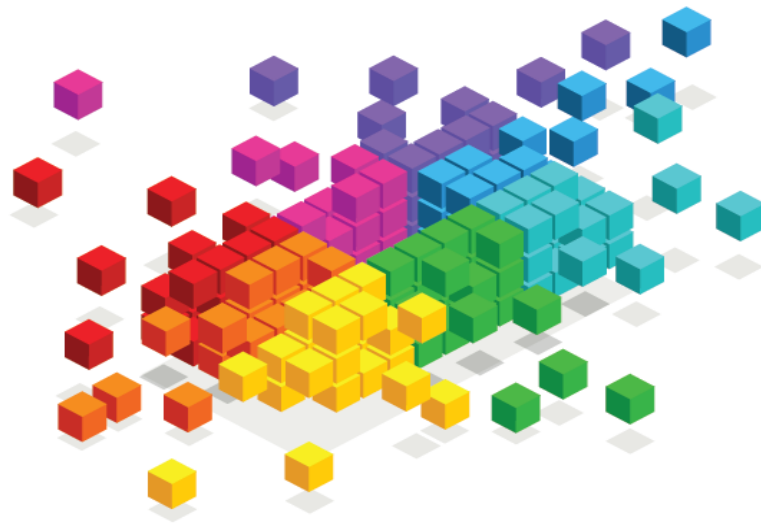


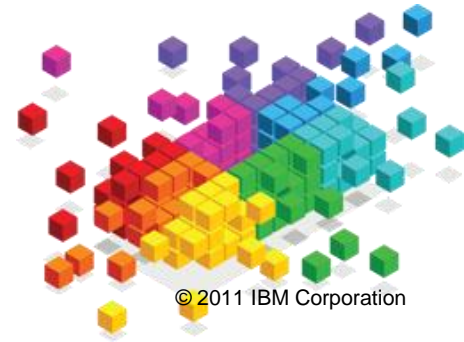
# IBM Case Manager: Product Update

Putting Content to Work  
ECM UserNet 2011



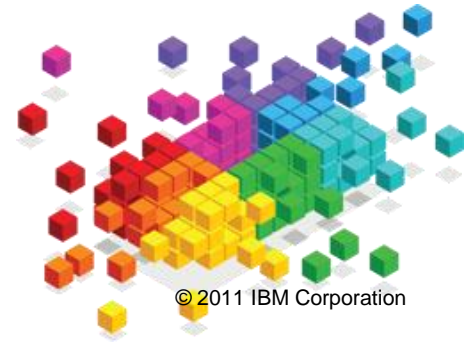
## Disclaimer

*Information regarding potential future products is intended to outline our general product direction and it should not be relied on in making a purchasing decision. The information mentioned regarding potential future products is not a commitment, promise, or legal obligation to deliver any material, code or functionality. Information about potential future products may not be incorporated into any contract. The development, release, and timing of any future features or functionality described for our products remains at our sole discretion.*



# Agenda

- What is Advanced Case Management?
- What Comprises a Leading Case Management Product?
- IBM Case Manager Overview and Capabilities
- IBM Case Manager Components
- Benefits and examples
- Q&A



# What is ?

## Dynamic Case Management

FORRESTER

“A **semi-structured** but also **collaborative, dynamic, human, and information-intensive** process that is driven by **outside events** and requires incremental and progressive **responses from the business** domain handling the case. “



# A Case Example

## Case management in motion



### Request from Divorced Bank Customer

#### **Client Request**

- Change of address
- Close joint bank account
- Set up two college trust funds for his children
- Transfer pension funds

#### **Bank**

- Deal with the customer request as efficiently and effectively as possible
- Needs to take into account regulations (i.e., the pension rights might be subject to final court jurisdiction)



Instead of triggering a separate work item for each aspect

### **A Dynamic Case Management approach**

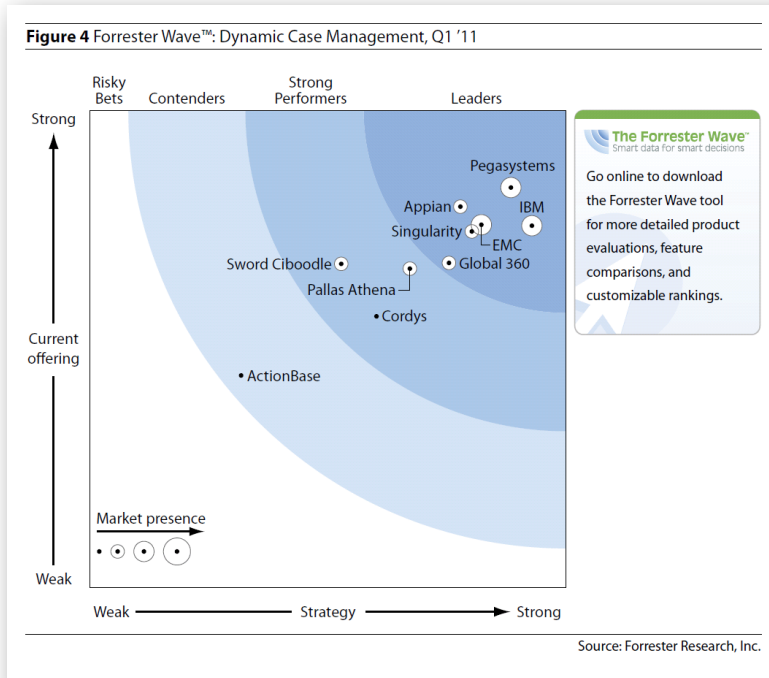
Add processes to the single view of the case, handling each relatively simple request with a dynamically bound process definition.

### The result

- Legal review associated with the pension request...uncovers a jointly held mortgage.
- *The customer – and his information, associated needs/tasks - represents the “case”*
- *Tasks and processes are driven by the needs of the case and are not pre-determined*
- *Existing processes can be linked/called when if necessary.*
- *The tasks, their outcome, notes, discussions, and information must be maintained – and searchable and auditable – through and beyond the outcome of the case.*

# Results from the Forrester Case Management Wave

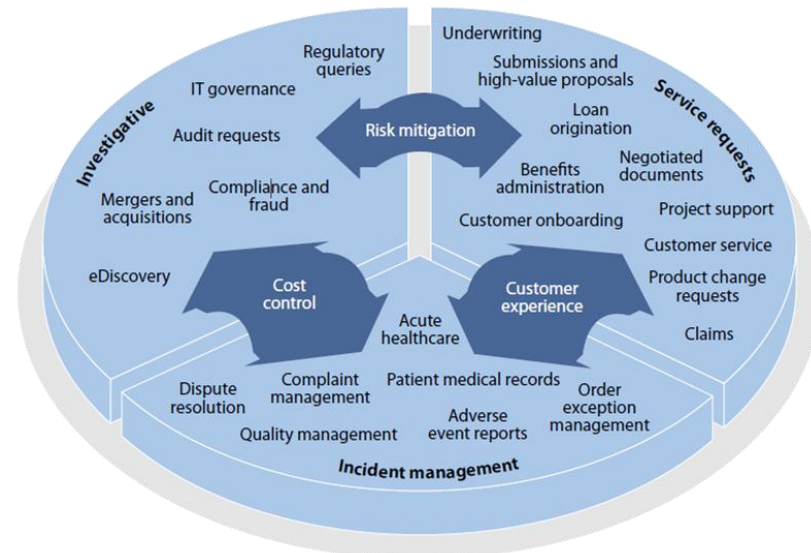
## IBM Case Manager Declared Unique in the Market



“IBM will drive **leadership** in analytics in the dynamic case management market.”

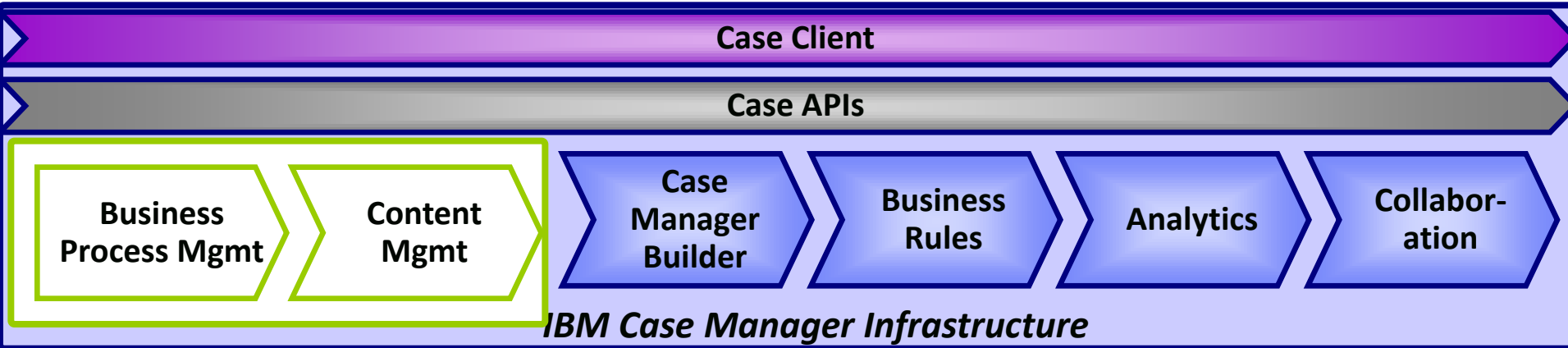
“IBM can claim the **strongest scores** across the three DCM use case categories — investigative, service request, and incident management — reflecting the strength and comprehensiveness of its **overall portfolio**, which combines BPM, ECM, and analytics.”

“Strategically, its strong **partnership ecosystem** will help drive the horizontal platform deep into industry solutions across all DCM use case segments.”



# IBM Case Manager:

*Active content infrastructure meets rapid solution design and delivery*



*Leverage and integrate with P8 processes*

*Use dynamic tasks*

*Leverage CM content in cases and to create cases*

*ILG capabilities*

*Consolidated design*

*Reusable templates*

*Historical  
Real time  
Content analytics*

*Link rules to processes and tasks*

*See who has worked on cases*

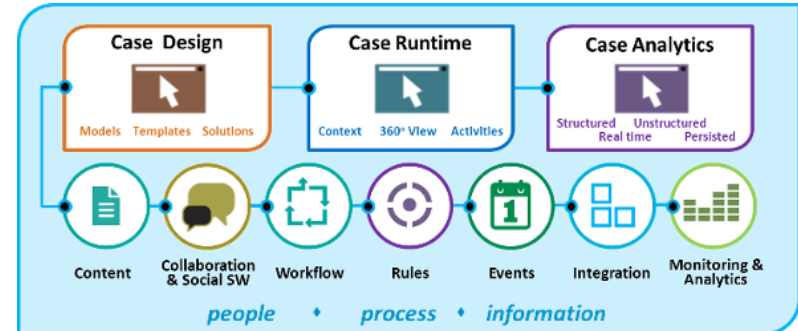
*Collaborate in context*

# Inside the IBM Case Manager Platform

A unique combination of bundled and integrated capabilities

## Case capabilities

- Case Builder
- Case Client
- Case object model
- Case, PE, and CMIS APIs



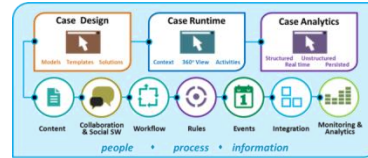
## Integrated and bundled capabilities:

- WebSphere ILOG jRules\*
- Content Analytics (Text analytics)\*
- Cognos Real Time Monitoring (Real time analytics)\*
- Lotus SameTime (embedded awareness in case runtime and web chat)\*

## Integration with WPS and invocation from Case Manager

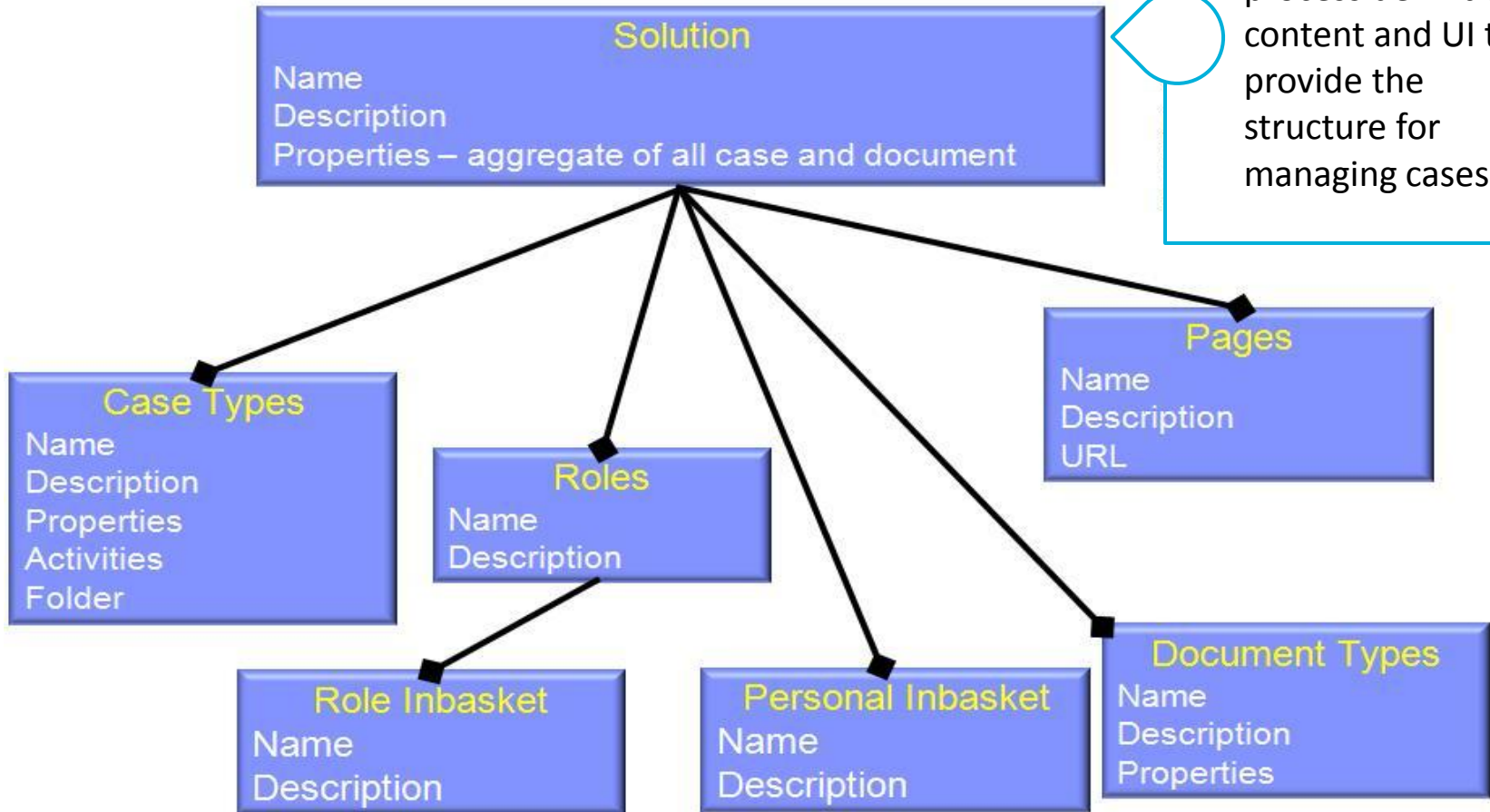


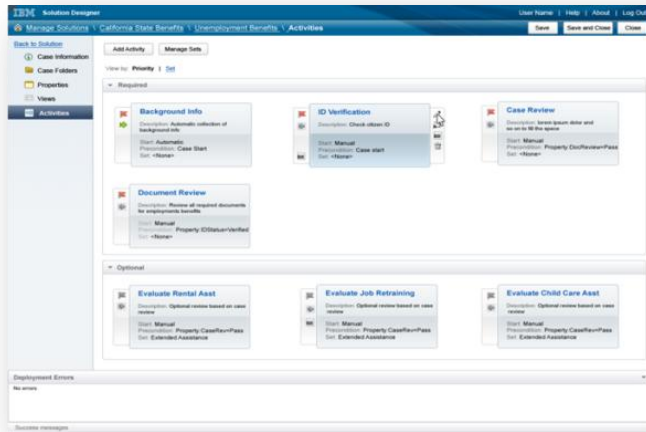
# Case Object Model



**Solution**

- a collection of process definitions, content and UI that provide the structure for managing cases



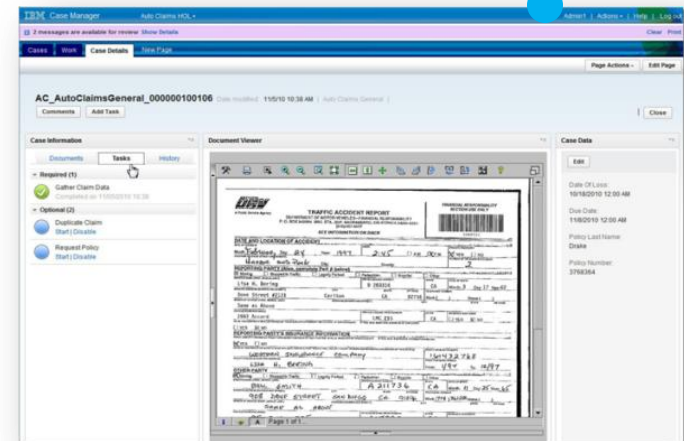
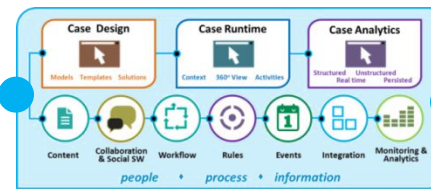


## Case Design

- Easy to use, business user oriented “Interview Mode” (wizard-driven)
- Comprehensive 360° view across case assets
- Templates shorten time to value for a fast start

## Case Runtime

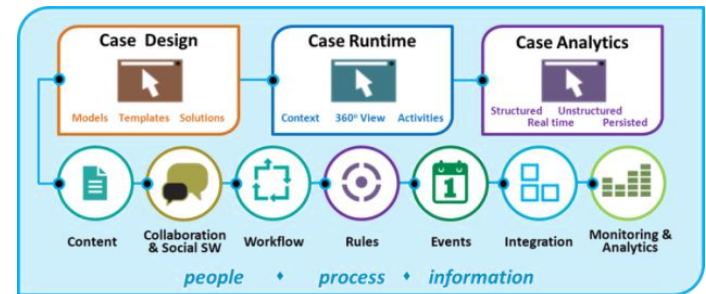
- Role-based and personalized
- Flexible and extensible
- No more disjointed jumping between application
- Bring people, process and information together to drive case progression and better outcomes



# Inside Case Manager Builder and Case Manager Client

## Builder

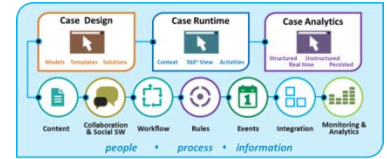
- Case Solution builder for line of business analysts
- Business Analysts design and compose case solutions
- Freedom Framework and IBM Dojo 1.4
- visual modeling capabilities from iLog Jviews Diagrammer



## Client

- Lotus Mashup iWidget based application - Business analysts design end user layouts & collaborate on and process cases
- iWidget based interface
- Based IBM Dojo 1.4
- Integrated Lotus OneUI look and feel
- Integrated IBM Sametime LiveNames API for Sametime awareness and chat

# Case Manager Builder



IBM Case Manager Builder P8Admin | Help | About | Log Out

Manage Solutions Reset Test Environment Refresh Solutions

**Creating the solution**

Select a template

From a blank template  Use the wizard to define the solution

**Auto Insurance Claims Solution** ✓

Solution for auto insurance claims

Last modified by P8Admin on September 16, 2010 🚗

**Claims management system** ⓘ

Claims management system

Last modified by P8Admin on September 13, 2010 🚗

**Credit Card Disputes** ⓘ

Solution for managing credit card disputes

Last modified by P8Admin on September 14, 2010

**Credit Card Disputes EWF** ⓘ

Solution for managing disputed credit card transactions.

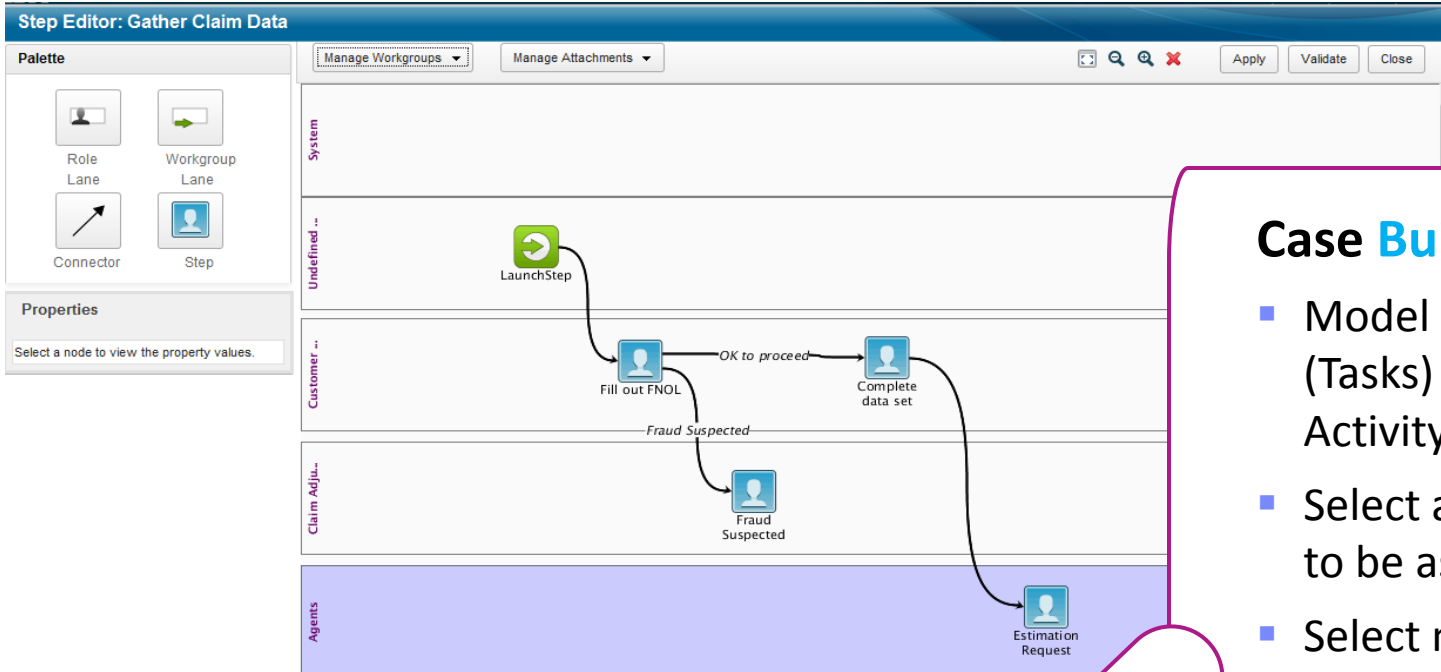
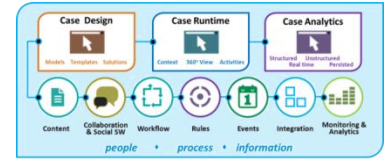
Last modified by P8Admin on September 14, 2010

**Credit Card Disputes v4** ⚠

Solution for managing disputed credit card transactions.

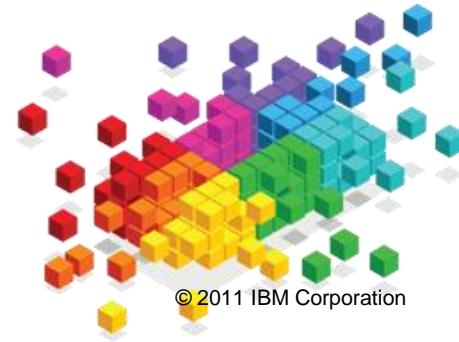
Last modified by P8Admin on September 13, 2010

# Case Builder Step Editor – Human Task Modeling

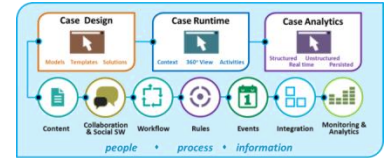


## Case Builder

- Model human processes (Tasks) supporting the Activity
- Select a role (swimlane) to be assigned
- Select mashup page



# Tasks in Case Manager



IBM Case Manager Builder

Manage Solutions \ LM1 \ Case1

- Case Type
- Properties
- Views
- Case Folders
- Tasks

Tasks contain one or more steps that you can create with the Step Editor. Steps appear as work items in the Case Man

View by: [Priority](#) | [Set](#)

▼ No set

**Dispute**

Precondition:  
Case Start

Set: <None>

▼ Mutually exclusive set: Fraud Detection

**Pay Claim**

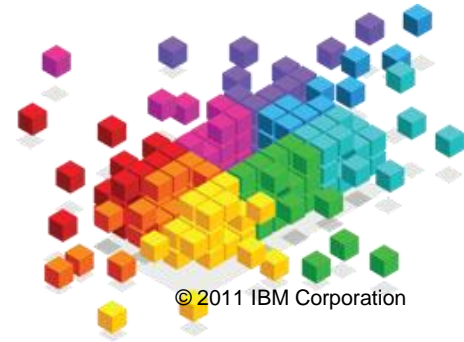
Precondition:  
Property: LMProp1 = '0'

Set: Fraud Detection

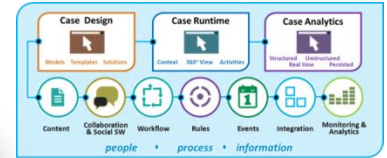
**Supervisor Review**

Precondition:  
Case Start

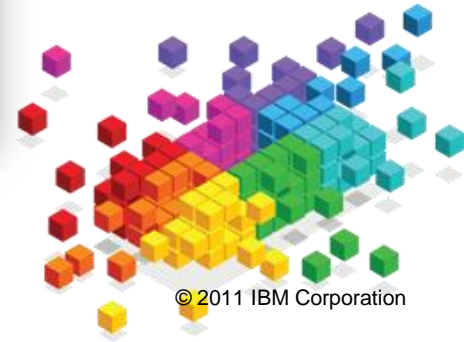
Set: Fraud Detection



# Case Manager Client



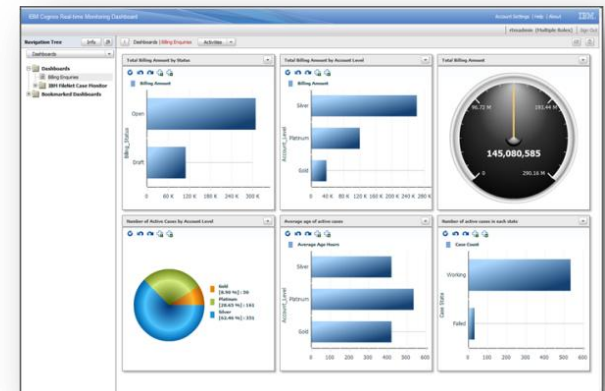
The screenshot shows the IBM Case Manager Client interface for a case titled 'AC\_AutoClaimsGeneral\_00000100106'. The interface includes a navigation bar with 'Cases', 'Work', 'Case Details', and 'New Page'. A 'Case Information' sidebar on the left shows 'Documents', 'Tasks', and 'History' tabs. Under 'Tasks', there are 'Required (1)' and 'Optional (2)' sections. The 'Required (1)' section contains a task 'Gather Claim Data' which is completed. The 'Optional (2)' section contains 'Duplicate Claim' and 'Request Policy'. The main area is a 'Document Viewer' displaying a 'TRAFFIC ACCIDENT REPORT' form. The form includes fields for 'DATE AND LOCATION OF ACCIDENT', 'REPORTING PARTY', 'INSURANCE INFORMATION', and 'OTHER PARTY'. The 'Case Data' sidebar on the right shows 'Date of Loss: 10/18/2010 12:00 AM', 'Due Date: 11/8/2010 12:00 AM', 'Policy Last Name: Drake', and 'Policy Number: 3768364'.



# IBM Case Manager – Case Analytics

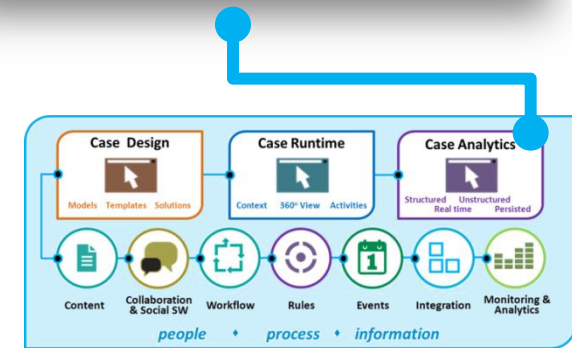
## Case Analyzer (Historical Reporting)

- Excel and Cognos enable case and process analysis
- Dynamic - Drill down, slice and dice, filter, etc
- High performance, large volume analysis



## Case Monitor (Real Time Dashboards)

- Cognos RTM 10.1 provides real time cases and process monitoring
- Threshold monitoring and alert generation



## Content Analytics

- Crawl and index case contents and metadata
- Discover patterns, trends and insights across cases
  - Example : Most common compliant in user comments in cases

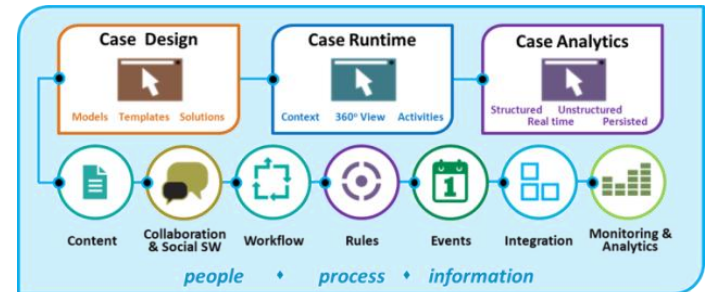


# New P8 Engine Features Supporting Case Manager

## Case Object Model

### – *New Task Object Type*

- Automatic triggering to kick off of activities (e.g., launch workflows)
- Controls progress of each task and Provides task Pre & Post conditions



## Case Builder Support

### – *PE Server updates*

- Support for templating model & Support round-trip authoring

### – *Process Definition Enhancements & Dynamic step parameter attributes*

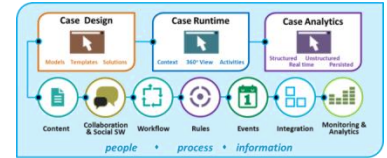
- BPM uses case properties
- Expose case properties to queues for searching, filtering, and sorting

## Case Client Support

- Allow for dynamic role membership assignment
- Support to case history Widget (Content Analytics for Case Analyzer)
- Provide user information for Sametime Integration

# Client and Partner Feedback

*A recent regional proof of technology meeting...*



1

## State Agency #1

"..I couldn't believe how easy it was to create a Case Management solution..."

2

## State Agency #2

".. We need this solution NOW, we have already spent 24 months trying to build this same solution, and still do not have in production..."

3

## City Agency

"..I will be recommending to City Council to approve the funding for this project..."

4

## Financial Services Organization

".. Our users will love this client interface..."

# Customer Case Study : Business Benefits

## Large FileNet Content Manager & BPM customer

### Need : Dynamic flexible Insurance claim processing

#### *Change a simple claim to complex claim*

Customer reports an accident that involves car damage

A simple claim is filed. Insurance company creates a reserve to pay damage

While claim is processing, customer reports bodily injury

Claim now changed from simple claim to complex claim that contains car damage and bodily injury



### Current solution:

Entirely new claim created. Productivity loss across hundreds of cases.

**IBM Case Manager solution :** Simply trigger a new task on the same claim. Dramatic productivity & tracking gains

### Case management solution capabilities

- **Dynamic work handling**  
Change how work is progressed as events dictate
- **New tasks launched and managed**  
Retain the context and auditability of the entire case
- **Leverage current FN BPM processes**  
Full participants and are called upon, as required for case progression
- **No need to duplicate information**  
Easily address new/ dynamic tasks as part of a case
- **Apply resources more efficiently**  
Facilitate complex case elements

# IBM Case Manger

## Platform Benefits

1

### Agility

Template based solutions can be easily modified and reused; dynamic tasks and business rules add flexibility to case scenarios.

2

### Informed

Role based interface; 360-degree view of a case and all related information, transactions, and history; integrated analytics help drive outcomes

3

### Innovate

Derive key insights from content analytics to optimize cases; mix prescriptive and ad hoc processes with collaboration to achieve goals

4

### Leverage

Augment existing straight through processes with dynamic tasks; include existing content from any repository in case solutions

# Why IBM ?



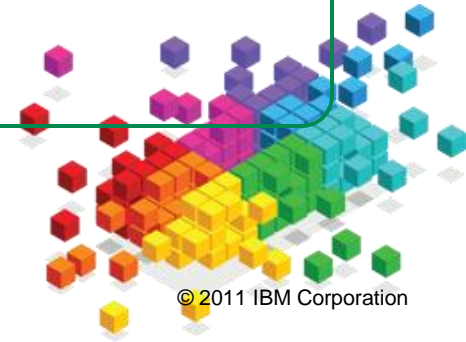
*Products, partners, solutions*

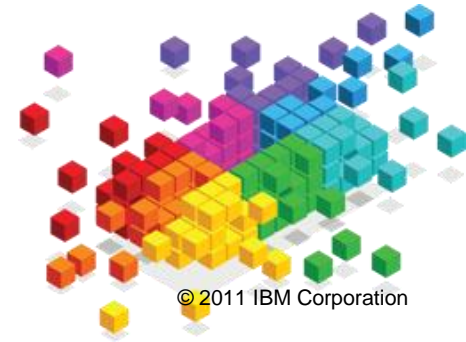
IBM's innovative platform for building case-based solutions

Value-added partners covering industry and geographic

Horizontal and vertical solutions to meet the unique requirements of our customers

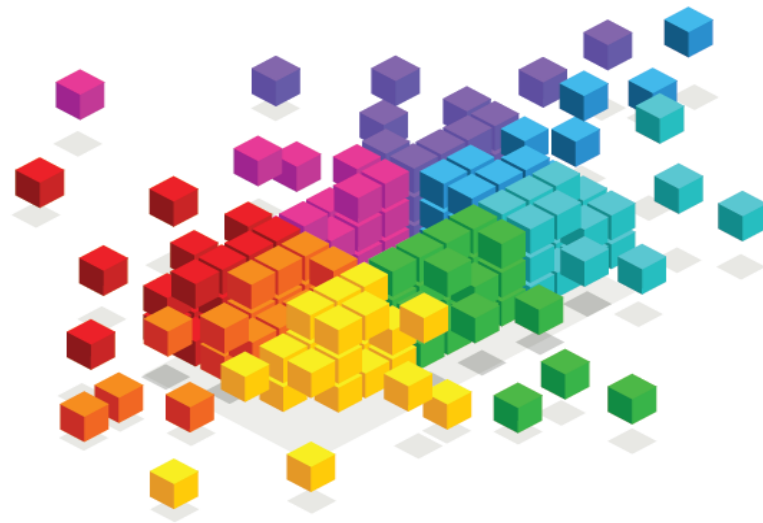
<http://www-01.ibm.com/software/data/advanced-case-management/>





# IBM Case Manager: Product Update Backup

Putting Content to Work  
ECM UserNet 2011



## Glossary

- What is a Solution?
  - A set of user interfaces, content, and process definitions that provide the structure for the management of cases.
- What is a Case?
  - A set of related activities, content, processes, and collaboration artifacts used together to manage a specific business activities.
- What is a Case Type?
  - A definition of a case
- What is a Task?
  - A list of items that need to be completed in the context of a case (i.e., a ToDo list).
- What is a Role?
  - A collection of user accounts associated with a specific business function. These are used to access a particular task or work queue step.
- What is a Document Type?
  - A document class in the P8 Content Engine.





# Capabilities and Benefits of Active Content

- Built-in, integrated relationship between the effective (“right”) version of content, the process that governs it, and the case or situation in which it is relevant.
  - No need to develop and manage integration among different applications at various levels of technical depth (UI, APIs, security, etc.)
  - Enhanced performance, both at the system level and at the user level
  - Decreased operational cost due to fewer products to implement, manage, and maintain
- Bi-directional eventing enables cases to be opened automatically simply by having identified a type of document; similarly, actions can occur automatically with content based on tasks, other content events, etc.
  - All actions are *configured*, not coded, saving significant development costs
  - The platform encourages reuse, both at the underlying process and the solution template levels, decreasing time to value and cost for new solutions
- Complex situations and cases are addressed easily with a combination of process types and actions; cases or situations can flow through prescriptive paths and/or be handled dynamically.
  - Allows collaboration or spontaneous actions to achieve outcomes *with* auditability
  - Established processes can now automatically address exceptions and ensuing cases
  - Structured data and content can be included in cases and drive actions
- **Context of actions taken, content changed, and decisions taken is kept and presented to any worker that picks up the case at any time.**
- Single vendor and single source of support across capabilities decreases TCO

