

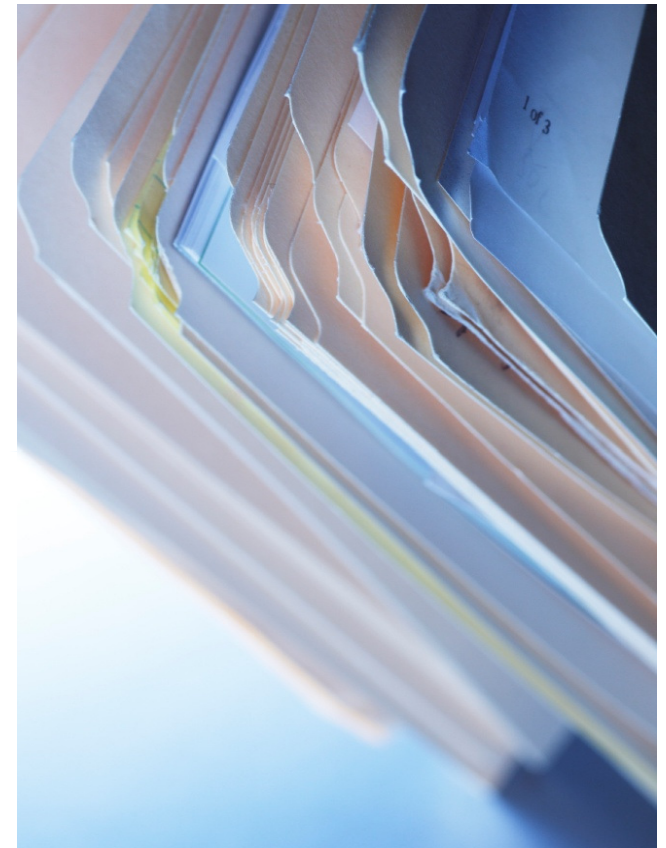
Meeting the Needs of Your Business with IBM Case Manager

Powerful Tools for Business and IT Organizations



New market demands require new approaches

- Increased costs and risks from unpredictable processes
- Higher customer service level expectations
- Greater demands for productivity amid complex decisions
- Limited ability to respond to market dynamic
- Departing and diminished workforces



Challenges for IT

- Deliver on an ever growing Line of Business solution backlog
- Simplify internal architectures
- Reduce the number of tools and the unique skills required
- Adhere to corporate legal and risk policies

Case Management - Increasing importance of case style of work

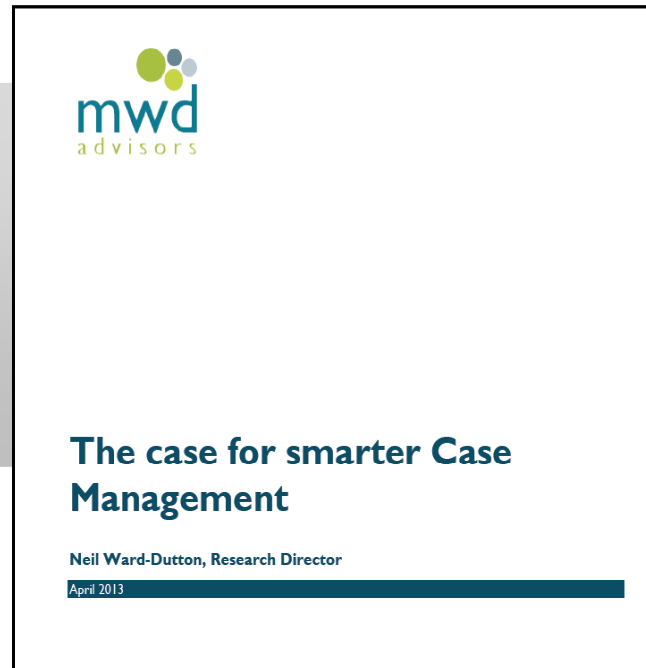


*“Casework is **complex and not routine**. Each case is a unique situation that involves complex interactions between **content, people, business and regulatory policies** to achieve an **optimal outcome**. Casework involves information, judgment, experience and policies, and strives to balance multiple and often contradictory perspectives about rights, entitlements, settlements, risks and money to reach an optimal (not perfect) outcome for all involved parties. Casework is often closely **audited** for adherence to corporate policies and government regulations, typically performed by **information workers** and experts, and is often **collaborative**...”*

Case-style work

A case management approach to supporting and managing work fits for situations where:

- Goals are understood, but the specific tasks, order and stakeholders are not completely defined
- Access to information is key
- Knowledge – some tacit, most documented - and business data - needs to be captured, analyzed, acted on, organized and stored

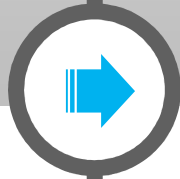


Marketplace view

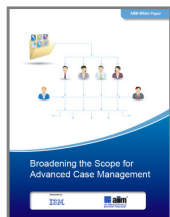
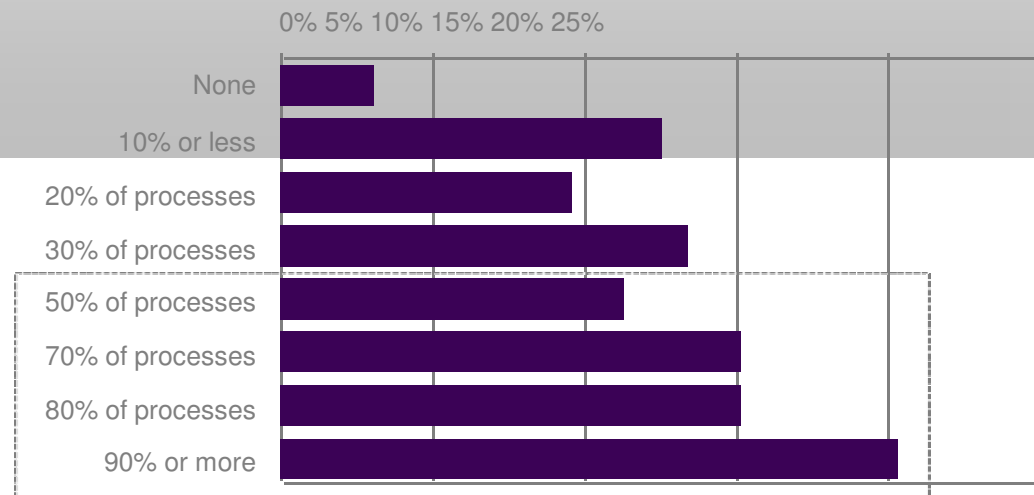
More than
60%



of respondents indicate that 50 percent or more of their processes involve casework



What proportion of your main line-of-business (LOB) processes would you say involve a case file, claim file, proposal, bid, incident report, service ticket, etc.?

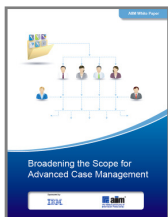
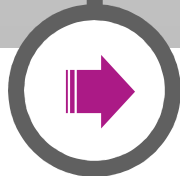


SOURCE: AIIM, *Broadening the Scope for Advanced Case Management*, Doug Miles, 2013, <http://public.dhe.ibm.com/software/data/sw-library/ecm-programs/IBM-AdvancedCaseManagement-2013-Final.pdf>. © AIIM 2013 www.aiim.org © IBM 2013 www.ibm.com

Marketplace view

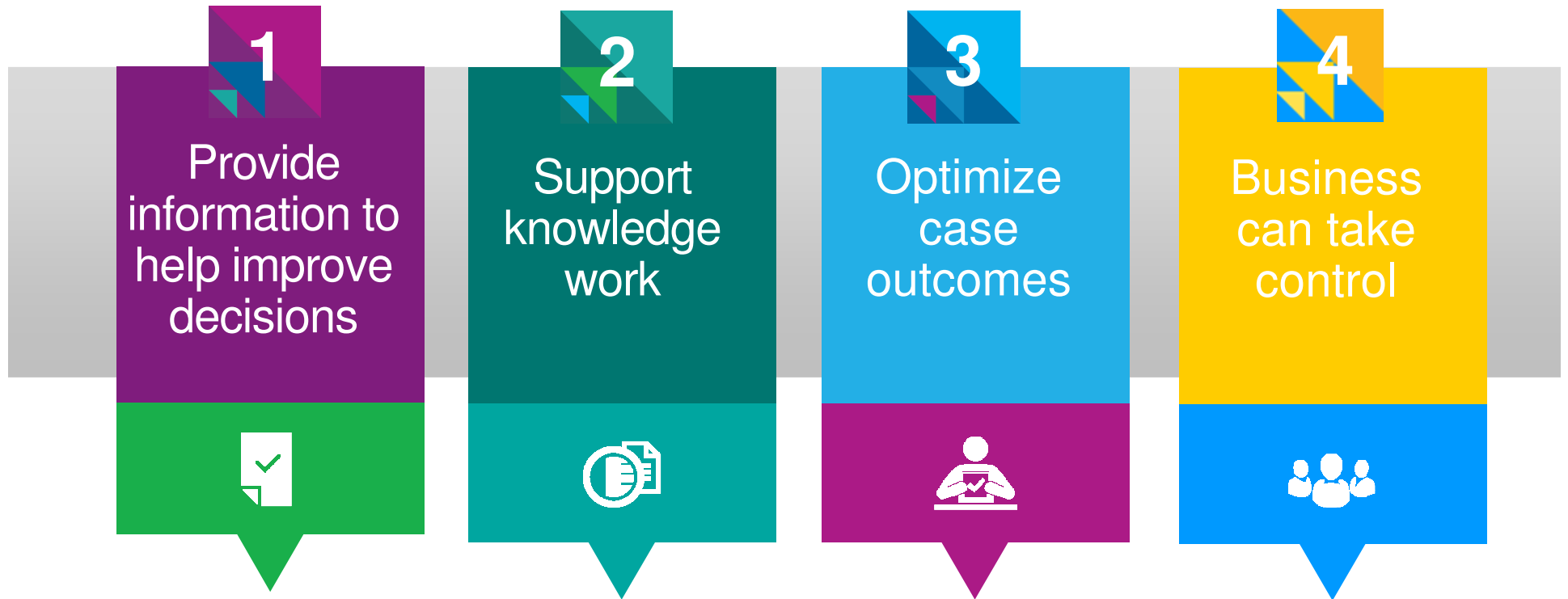
How would you categorize your most prevalent or important case application(s)?

But they do not necessarily call it **case management**



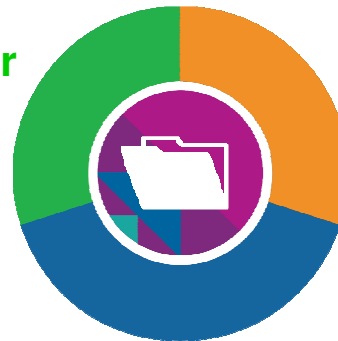
SOURCE: AIIM, *Broadening the Scope for Advanced Case Management*, Doug Miles, 2013, <http://public.dhe.ibm.com/software/data/sw-library/ecm-programs/IBM-AdvancedCaseManagement-2013-Final.pdf>. © AIIM 2013 www.aiim.org/© IBM 2013 www.ibm.com

Capabilities required to address case style workloads



Discover

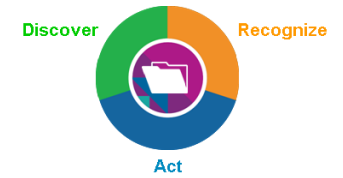
Recognize



Act

IBM Case Manager

Bringing it all together in one powerful platform



BA / Designer & IT

This screenshot shows the 'BA / Designer & IT' interface. It features a sidebar with navigation options: Case Type, Properties, Case Views, Case Folders, Rules, and Tasks. The main area displays a 'Required tasks' section with 'Review Dispute Item' and 'Close Case'. Below that is an 'Optional tasks' section with various actions like 'Add Document', 'Arbitration', 'Evaluate for Fraud', 'Generate Close Letter', 'Generate Credit Letter', 'Generate Fraud Letter', 'Generate Provisional...', 'Generate Status Letter', 'Process Chargeback', and 'Process Representation'. Each task card includes a description and a 'Set: vName' field.

Case / Task Worker

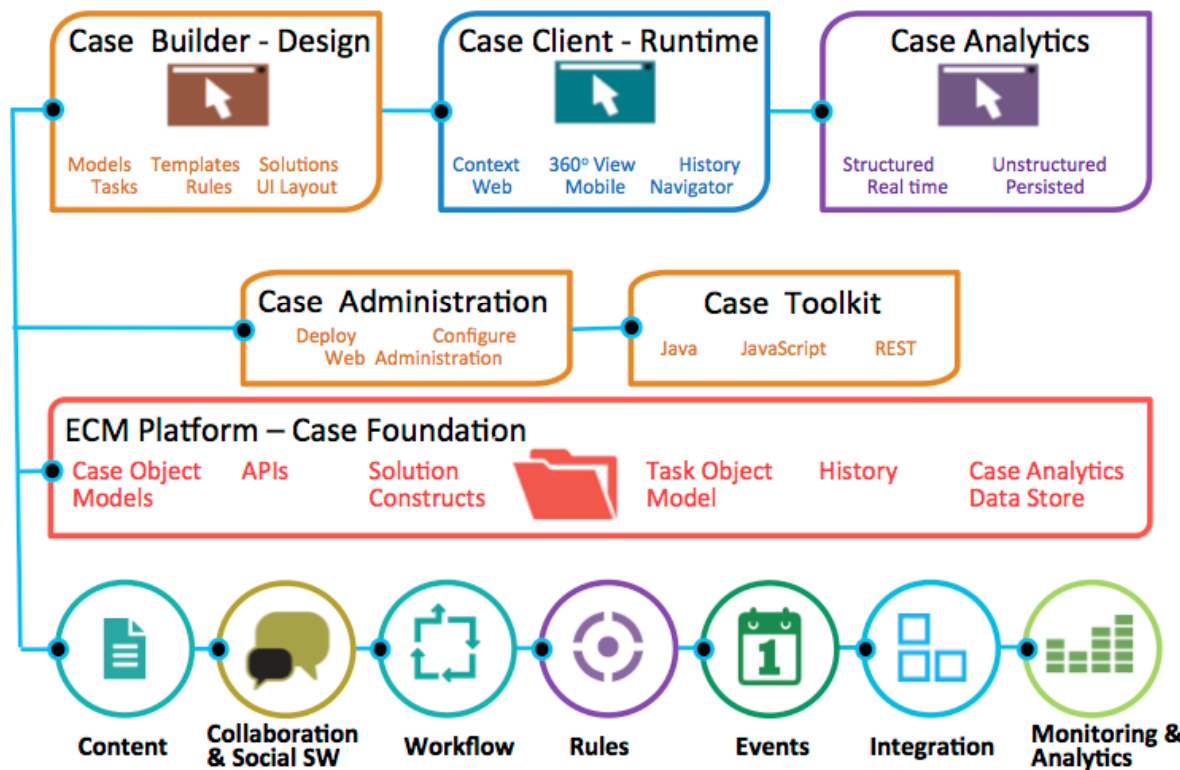
This screenshot shows the 'Case / Task Worker' interface for a specific case, 'Smith.Bob-230813'. It includes a 'Customer Information' section with fields for Account ID, Contact Phone Number, Customer Name, and Customer Status. A 'Transaction Details' section shows 'Dispute Details' with fields for Dispute Type, Disputed Amount, and Dispute Description. A timeline at the bottom shows the case's history from 23 Aug 2013 to 29 Aug 2013.

Manager

This screenshot shows the 'Manager' dashboard with several monitoring widgets. A large gauge displays '145,080,585'. Other widgets include 'Total Billing Amount by Status' (Bar chart), 'Total Billing Amount by Account Level' (Bar chart), 'Number of Active Cases by Account Level' (Bar chart), 'Average Age of Active Cases' (Bar chart), and 'Number of Active Cases in each state' (Bar chart). A pie chart shows the distribution of cases across different account levels.

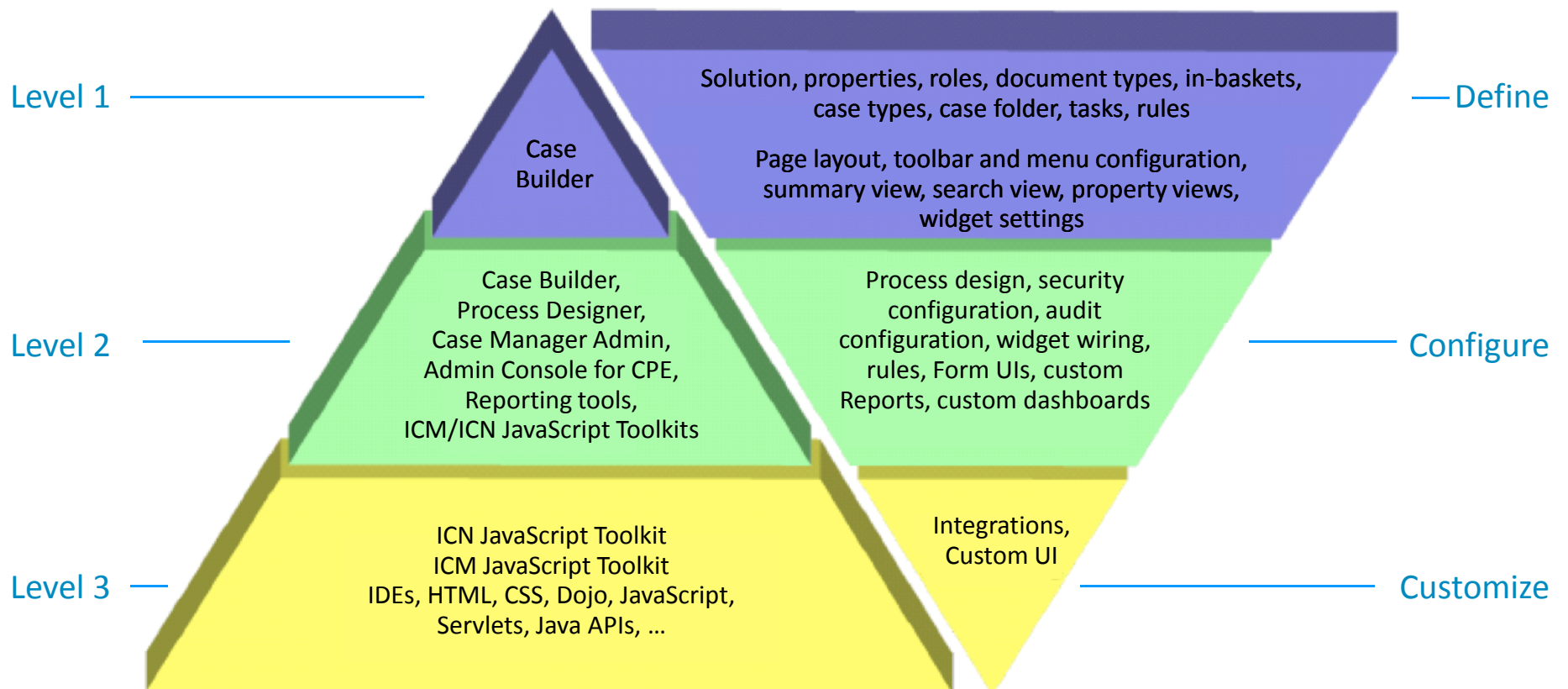
IBM Case Manager

Key Components Included



- **ECM Platform Foundation**
 - Built on top of an enterprise class active content platform
- **Case Manager Builder**
 - Case Solution builder tool oriented to needs of line of business analysts
- **Case Manager Client**
 - A run time environment for launching, processing, and interacting with cases
- **Case Manager Analytics**
 - Real time and historical case monitoring with threshold monitoring and alert generation
- **Case Manager Admin Client**
 - Web based tool for configuring the ICM environment and for moving solutions between development and production domains
- **Case Manager APIs**
 - Extend your case solutions using JavaScript, Java, and REST API toolkits

Levels of Design and Associated Effort and Skills



Case Builder: Rapid Solution Development

IBM Case Manager Builder

Manage Solutions \ Superbank Front Office

Superbank Front Office

Superbank with CCD
Solution prefix: DP109
Created by Intgpeadmin
Created on 23 August 2013

Properties

Roles

In-baskets

Document Types

Pages

Case Types

?
OK All

In-basket Name ^	In-basket Type	Associated Roles	Descri
Advisor Tasks	Role	Customer Service Representative	
Correspondence Tasks	Role	Correspondence Team	

CSR Tasks

In-basket General

In-basket Filters

Roles associated with this in-basket: Customer Service Representative

* In-basket Name: Description:

Select Property

Name	Sortable	Sort Default	Sort Order
Time Created	<input type="checkbox"/>		
Subject	<input type="checkbox"/>		
Assigned Date	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	Descending ▾
Work Item	<input type="checkbox"/>		
Customer Name	<input type="checkbox"/>		

► The deployment status was updated for the solution Superbank Front Office.

Case Builder: Case Types

IBM Case Manager Builder

Manage Solutions \ Customer Que... \ Customer Com...

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

Case Type Attributes

*Case type name:
Customer Complaint

*Case type unique identifier:
QC_ Complaint

Case type description:
Customer Complaint Management Application

Starting document type:
<None>

Enable case workers to create custom tasks

Default layout for Custom Task Details page:
Custom Task Details

Default layout for Add Case page:
Add Complaint Case

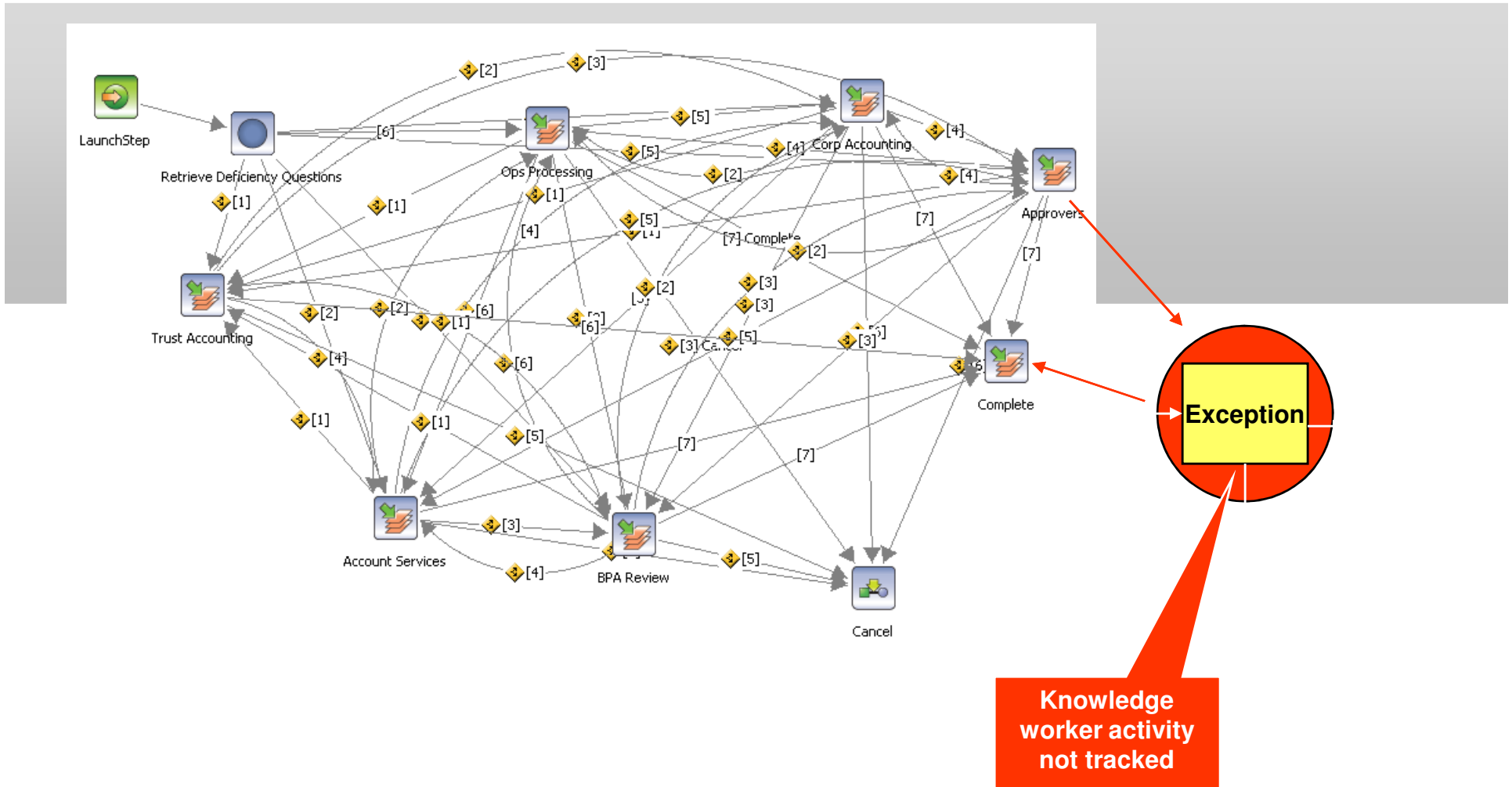
Default layout for Split Case page:
Split Case

Default layout for Case Details page:
Case Details

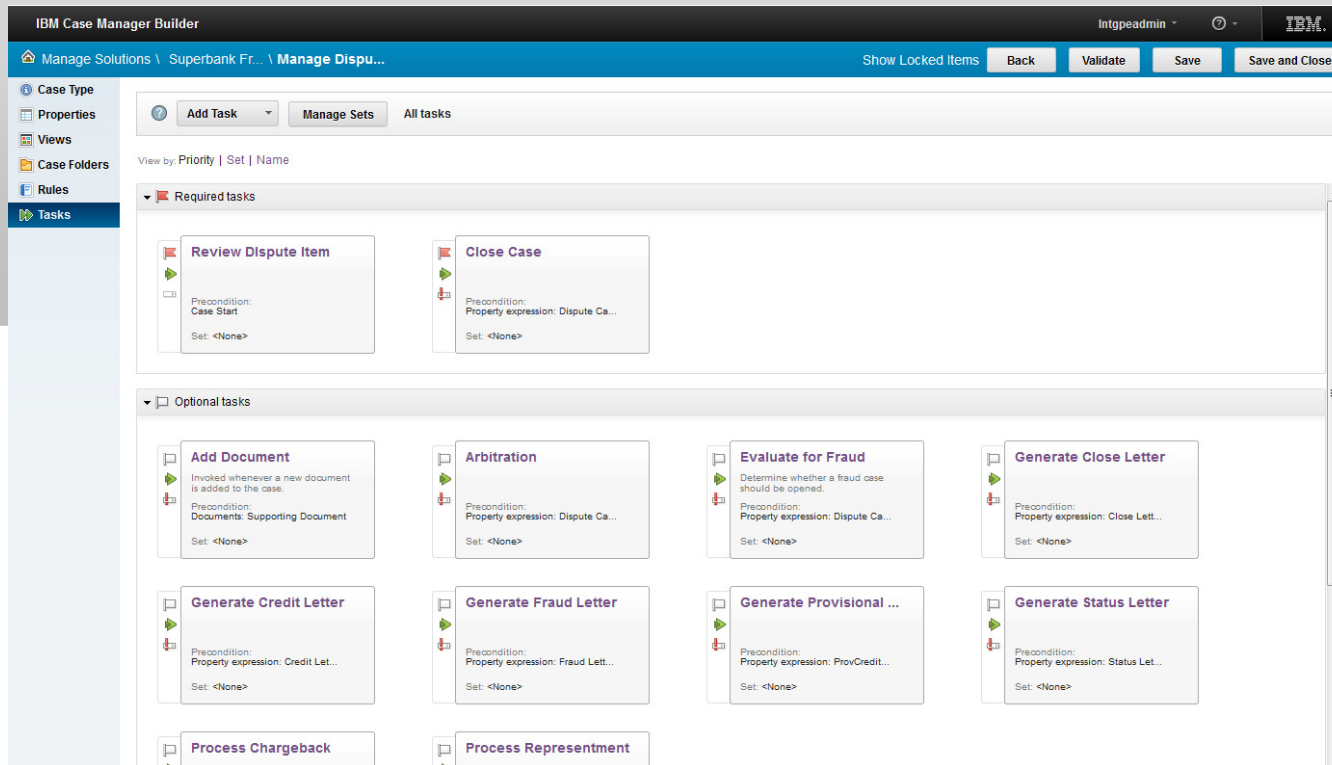
Override default case details page layout for:
Contact Center

▸ The Customer Queries and Complaints Management solution was opened.

Case Style Work Can Be Unpredictable

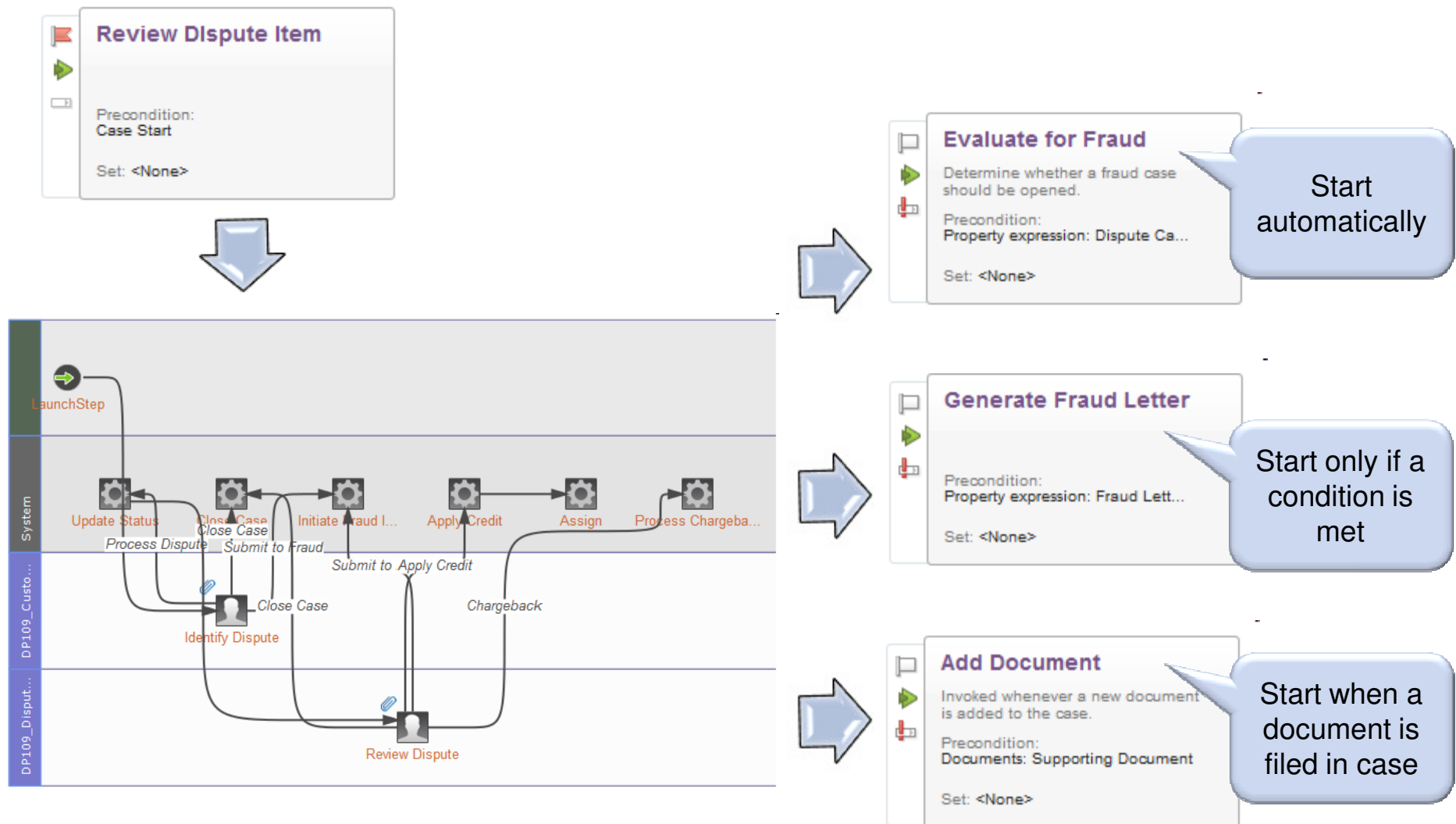


The Power of IBM Case Manager Tasks



- Repeatability
Tasks can be repeated at will
- Grouping
Inclusive and Exclusive
- Optional
User directed launching or skipping
- Ad hoc
User dealing with unknown
- Triggered by
Case worker actions
New content arrival
Updates to case data

Tasks and Dependencies



Solution Building 1, 2, 3

1

IBM Case Manager Builder
Manage Solutions | Superbank Front Office

Superbank Front Office
Superbank with CCD
Solution prefix: DP109
Created by Intgpeadmin
Created on 23 August 2013

Properties | Roles | In-baskets | Document Types | Pages | Case Types

Add Property | OK All

Name	Type	Descriptor
Account ID	String	Maps to cre
Assigned Date	DateTime	Date a work
Case Identifier	String	A specially
Case Owner	String	The user id
CaseID	String	CaseID
Close Letter Request	Boolean	Hidden prop
Contact Phone Number	String	Contact num
Credit Letter Request	Boolean	Hidden prop

Customer Name

Name: Customer Status Type: String

Define Property Values

This property can have:
 A single value
 Multiple values

Default value: Silver

The Superbank Front Office solution was opened.

2

Superbank Front Office
Superbank with CCD
Solution Prefix: DP109
Last modified by Intgpeadmin on 29/08/2013

Edit | Copy | Remove | Deploy | Com

3

IBM Case Manager
Cases | Work | Case Smith.Bob-230813

Smith.Bob-230813 | Modified: 28/08/2013 09:04 | Manage Dispute Item

Add Comment to Case | Add Task | Add Custom Task | Split Case

Documents | Tasks | History

Home

- Correspondence Modified: Intgpeadmin | 23/08/2013 18:20
- Supporting Documents Modified: Intgpeadmin | 23/08/2013 18:20
- PC.jpg Modified: Intgpeadmin | 28/08/2013 09:07

Customer Information

Account ID: 545-456-5456
Customer Name: Bob Smith

Transaction Details | Dispute Details

Dispute Type: Quality of goods
Dispute Description: Broken PC
Merchant Name: UsedStuff.com

Timeline: 23 Aug 2013 18:00:00

Smith.Bob-230813 Created on 23/08/2013 18:20

- 1 – Design
- 2 – Deploy
- 3 – Test

Case Worker User Experience - Case Search Page

The screenshot displays the IBM Case Manager interface. At the top, the header includes 'IBM Case Manager', a user profile for 'Intgpeadmin', and the IBM logo. The main navigation bar shows 'Cases' and 'Work' tabs, with 'Cases' selected. On the left, there is a sidebar with icons for home, search, and settings. The central area features a search filter for 'Case Owner' and a search button. Below the search, four case entries are listed:

- Perman.Dave-23.08.13**
Account ID: 123-123-123 | Date Case Opened: 23/08/2013 17:21 | Customer Name: Dave Perman | Dispute Case State: Closed By Customer | Finality Date: | Case Owner:
- Smith.Bob-230813** (highlighted)
Account ID: 545-456-5456 | Date Case Opened: 23/08/2013 18:20 | Customer Name: Bob Smith | Dispute Case State: Review | Finality Date: | Case Owner:
- Jones.Ed-18.08.13**
Account ID: 5453345444 | Date Case Opened: 28/08/2013 12:03 | Customer Name: Ed Jones | Dispute Case State: Open | Finality Date: | Case Owner:
- Anderson.Sue-13.08.13**
Account ID: 544545666 | Date Case Opened: 28/08/2013 12:04 | Customer Name: Sue Anderson | Dispute Case State: Open | Finality Date: | Case Owner:

On the right side, the selected case 'Smith.Bob-230813' is shown with tabs for 'Summary', 'Tasks', and 'History'. The 'Tasks' tab is active, displaying an 'Add Task' button and a list of tasks categorized into 'Required (3)' and 'Optional (9)'. The 'Required' tasks include 'Close Case' (Waiting...), 'Review Dispute Item' (Started on 23/08/2013 18:20), and 'Generate Status Letter' (Completed on 23/08/2013 18:24). The 'Optional' tasks include 'Add Document' (Waiting...), 'Arbitration' (Waiting...), 'Evaluate for Fraud' (Waiting...), 'Generate Close Letter' (Waiting...), 'Generate Credit Letter' (Waiting...), 'Generate Fraud Letter' (Waiting...), 'Generate Provisional Credit Letter' (Waiting...), and 'Process Chargeback' (Waiting...).

At the bottom of the page, a status bar reads: '28/08/2013 12:08 - The search returned 4 items.'

Case Worker User Experience – Opening a Case

- **Role-based and personalized**
End user gets exactly the information they need to progress the case
- **Flexible and extensible**
Can be configured to meet unique business requirements
- **Provides deep context for case work**
No more disjointed jumping between application
- **Brings people, process and information together to drive case progression and better outcomes**

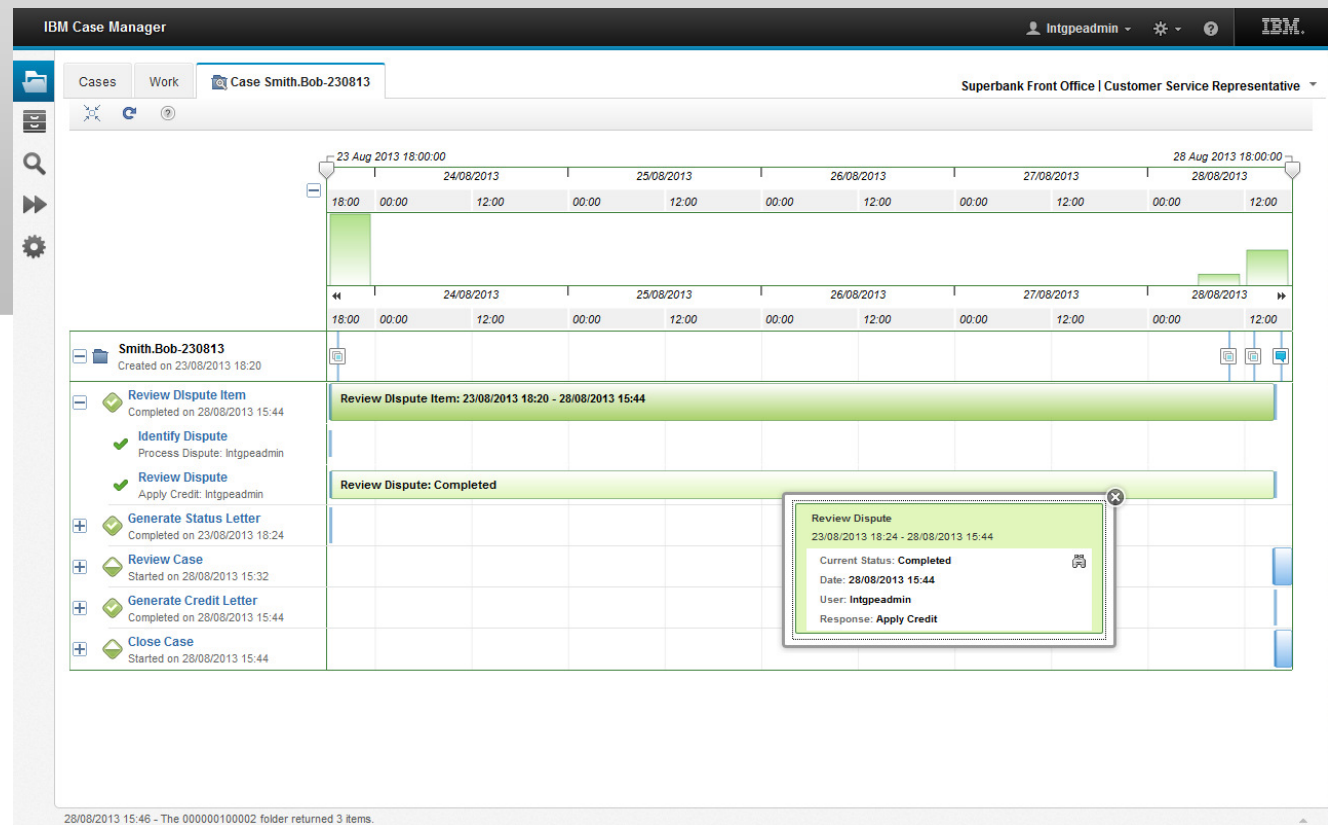
The screenshot displays the IBM Case Manager interface for a case titled "Smith.Bob-230813". The interface is organized into several sections:

- Navigation:** A sidebar on the left contains icons for home, search, and settings.
- Case Header:** Shows the case ID "Smith.Bob-230813", the last modified date "28/08/2013 09:04", and a "Manage Dispute Item" link.
- Actions:** A row of buttons includes "Add Comment to Case", "Add Task", "Add Custom Task", and "Split Case".
- Documents, Tasks, History:** A section with tabs for "Documents", "Tasks", and "History". It lists items like "Correspondence" (modified 23/08/2013 18:20), "Supporting Documents" (modified 23/08/2013 18:20), and a file "PC.jpg" (modified 28/08/2013 09:07).
- Customer Information:** A form with fields for "Account ID" (545-456-5456), "Contact Phone Number" (454 545-5434), "Customer Name" (Bob Smith), and "Customer Status" (Silver).
- Dispute Details:** A section with tabs for "Transaction Details" and "Dispute Details". It shows "Dispute Type" (Quality of goods), "Disputed Amount" (458.00), "Dispute Description" (Broken PC), and "Merchant Name" (UsedStuff.com).
- Timeline:** A horizontal timeline at the bottom shows the case was created on 23 Aug 2013 at 18:00:00.

Case worker user experience showing tasks, documents, history, and case data

Case History Visualizer

- Provides a quick overview of life of a case
Shows when things happened, what it was, and by whom
- Event Histogram shows when most activity occurred The taller the bar, the more things happened to the case
- Zoom in for more insight
The lower timeline zooms to show details such as tasks and work item completion



Cases are Dynamic

Documents | **Tasks** | History

Add Task

Required (2)

- Close Case
Waiting...
- Review Dispute Item
Started on 29/08/2013 15:18

Optional (11)

- Team Review
Ready | Start | Disable
- Add Document
Waiting...
- Arbitration
Waiting...
- Evaluate for Fraud
Waiting...
- Generate Fraud Letter
Waiting...
- Generate Provisional Credit Letter
Waiting...
- Generate Status Letter
Waiting...
- Process Chargeback
Waiting...
- Process Representation
Waiting...

Case workers can view and start new Tasks for a case, changing how that case is handled on-the-fly

IBM Case Manager

Cases | Work | Information

Anderson.Sue-13.08.13 | Mr

Add Comment to Case | **Add Task**

Documents | **Tasks** | History

Add | Open | Actions

Home

Add Task

Select a task type:
Request Letter

Enter a task name:
Request Letter

OK Cancel

Case workers can even add new Tasks to a case

Task Worker User Experience – In-baskets of Assigned Work

- **Role-based and personalized**
Customizable in-baskets of work for the user's role or assigned specifically to them
- **Flexible and extensible**
Can be configured to meet unique business requirements
- **Provides deep context for case work**
Direct access to the case data, documents and history

The screenshot displays the IBM Case Manager interface. At the top, it shows the user 'Intgpeadmin' and the role 'Superbank Front Office | Customer Service Representative'. The main area is divided into 'Cases', 'Work', and 'Information' tabs. Under the 'Work' tab, there are buttons for 'Manage Roles' and 'Add Case', and sub-tabs for 'CSR Tasks (2)' and 'Personal Work Items'. A table lists tasks with columns for Time Created, Subject, Assigned Date, Work Item, and Customer Name. Two tasks are shown: one for 'Sue Anderson' and one for 'Ed Jones'. To the right, a detailed view for 'Jones.Ed-18.08.13' is shown, including a 'Summary' and 'History' section. The history shows a sequence of tasks performed by 'Intgpeadmin' on '28/08/2013 12:03', such as 'Review Dispute Item', 'Close Case', 'Process Representation', 'Process Chargeback', 'Generate Status Letter', 'Generate Provisional Credit Letter', and 'Generate Fraud Letter'.

Time Created	Subject	Assigned Date	Work Item	Customer Name
28/08/2013 12:04	Review Dispute Item	28/08/2013 12:04	Identify Dispute	Sue Anderson
28/08/2013 12:03	Review Dispute Item	28/08/2013 12:03	Identify Dispute	Ed Jones

Task worker user experience showing configurable work lists and the case information associated with work item

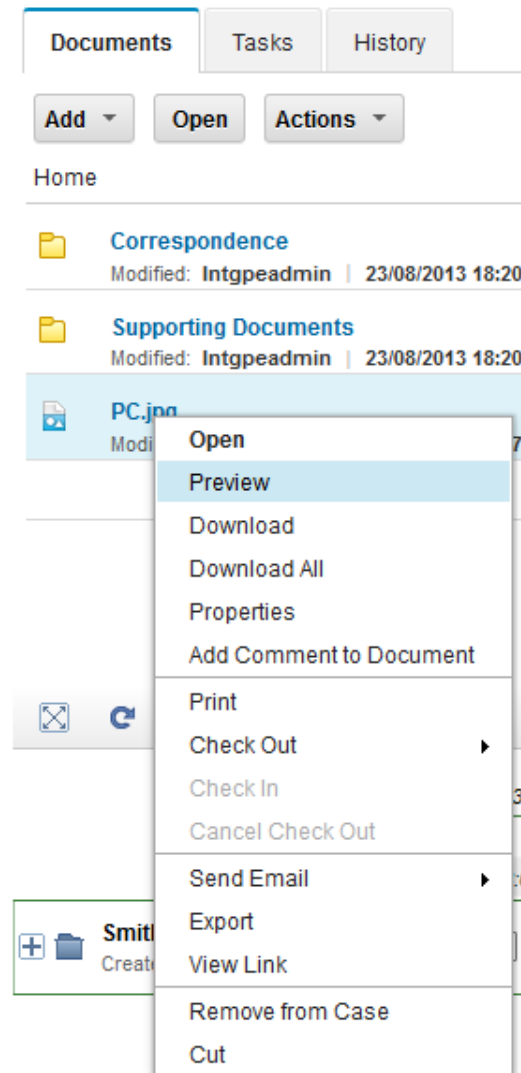
Task Worker User Experience – Work Details Page

The screenshot displays the IBM Case Manager interface for a 'Work' item titled 'Identify Dispute'. The page is divided into several sections:

- Header:** 'IBM Case Manager' on the left, user 'Intgpeadmin' and settings on the right, and 'Superbank Front Office | Customer Service Representative' on the far right.
- Navigation:** 'Cases' and 'Work' tabs, with 'Work' selected. A breadcrumb trail shows 'Gather Customer Data Identify Dispute'.
- Left Panel:** Contains a sidebar with navigation icons and a main area with sections: 'Routing' (Date Case Opened: 28/08/2013 12:03), 'Customer Information' (Account ID: 5453345444, Customer Name: Ed Jones, Contact Phone Number: 250 565-4544, Customer Status: Silver), and 'Transaction Details'.
- Main Content Area:** Titled 'Identify Dispute | Review Dispute Item'. It includes an 'Add Comment Work Item' button and a 'Process Dispute' button. Below is a document list for 'Jones.Ed-18.08.13' with tabs for 'Summary', 'Documents', 'Tasks', and 'History'. The 'Documents' tab is active, showing a list of folders: 'Correspondence' (modified 28/08/2013 12:03), 'Supporting Documents' (modified 28/08/2013 12:03), and 'PC.jpg' (modified 28/08/2013 12:15). An 'Attachments' section at the bottom shows 'Dispute Documents for Review'.
- Right Panel:** A preview window titled 'PC.jpg x' showing a photograph of a severely damaged laptop with a cracked screen and bent frame.

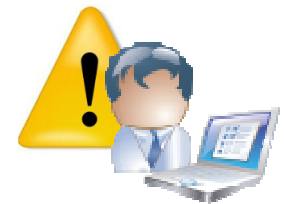
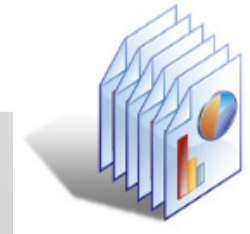
Fully Integrated Content Management

- **Every case has its own folder for storing its documents**
End user have quick access to case material
- **Integrated document viewer with markup capabilities**
View documents and case data at the same time
- **Full document management functionality**
Document versioning and metadata properties
- **Centralized content repository for all case artifacts**
Maintain control over cases and documents
- **Support for Content Navigator plug-ins**
Extend the standard capabilities



Active Content is Smarter Content

- Active content is a key capability where changes in content can cause an action within the system
- Active content allows customers to:
 - Accelerate time-to-value – significantly simplifying and shortening application delivery time
 - Achieve agility by allowing rapid changes through configuration
 - Mitigate risk by automating and logging important events for compliance or legal requirements
- Case Manager includes several built-in features that build on this capability
 - New case creation on document arrival
 - Case tasks that are started when documents are added to the case

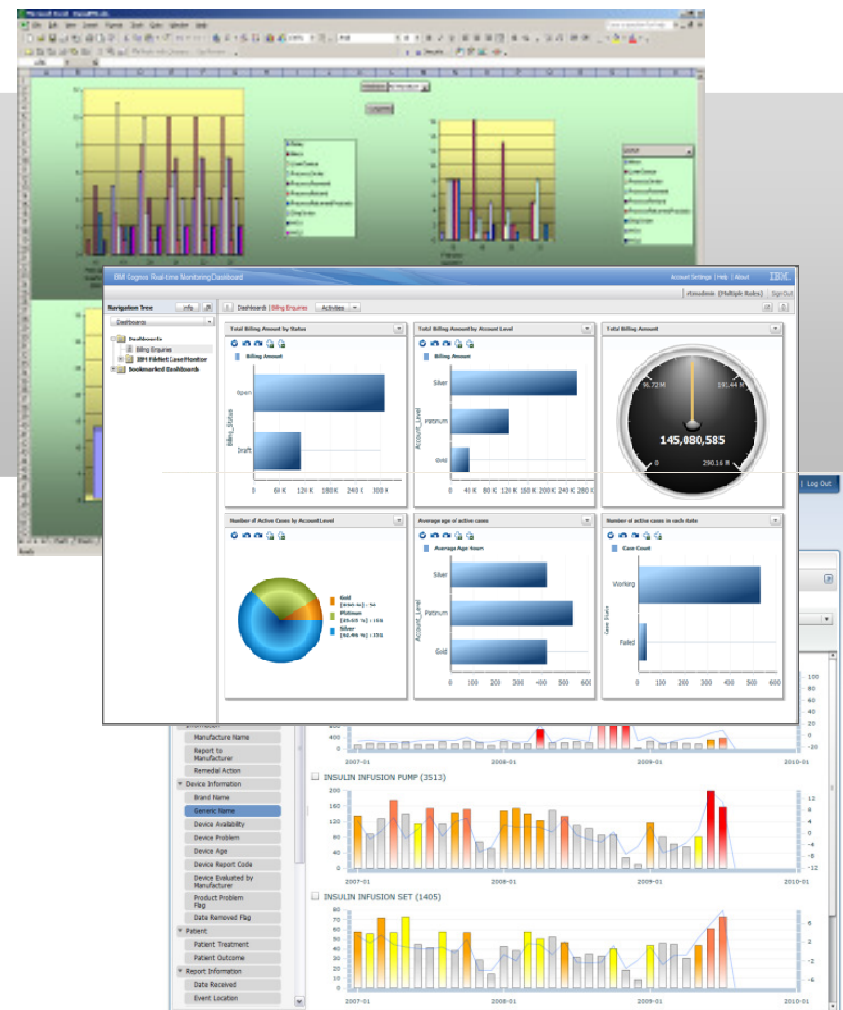


IBM Case Manager – 3 Styles of Analytics

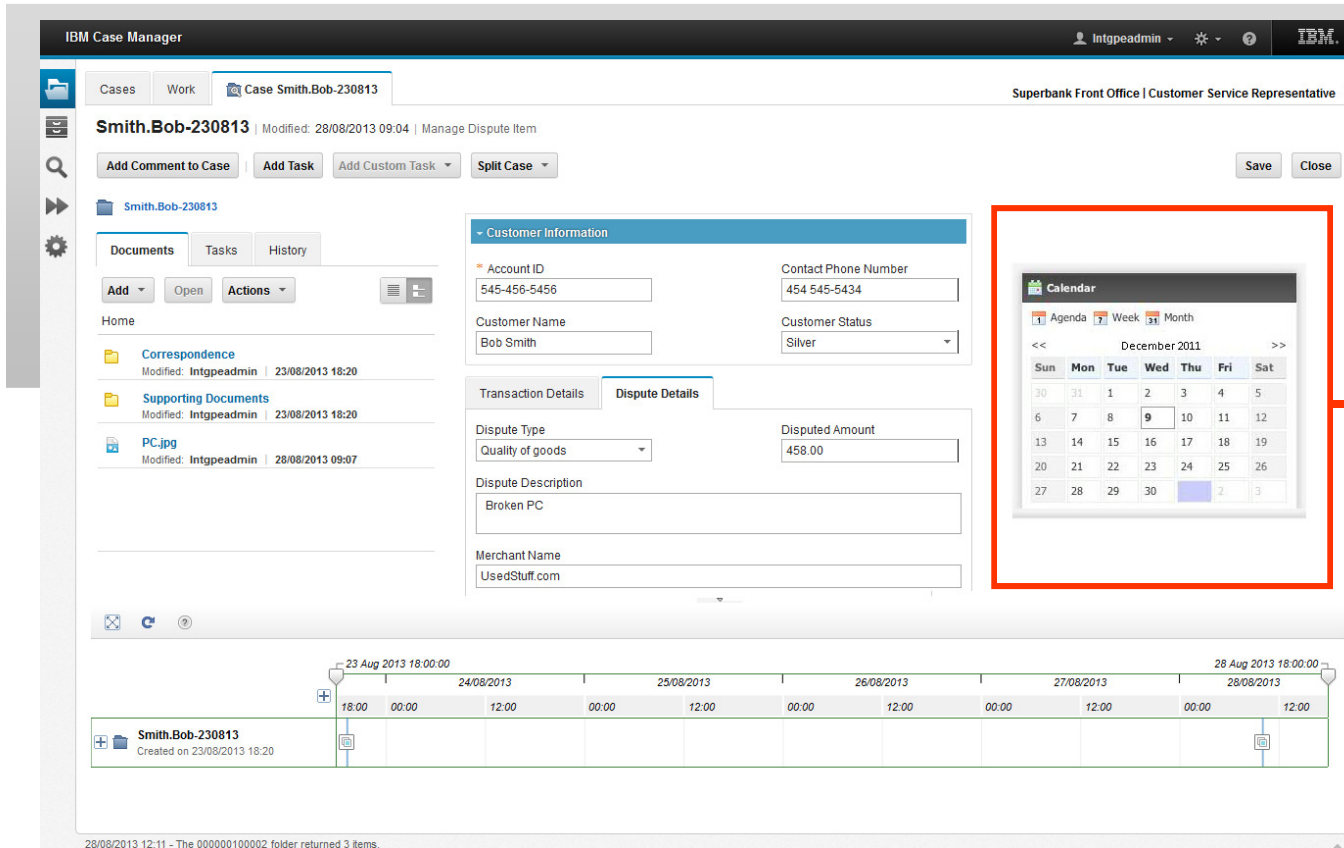
- Case Analyzer (Historical Reporting)
 - Excel and Cognos enable case and process analysis
 - Dynamic - Drill down, slice and dice, filter, etc
 - High performance, large volume analysis

- Case Monitor (Real Time Dashboards)
 - Cognos RTM provides real time cases 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

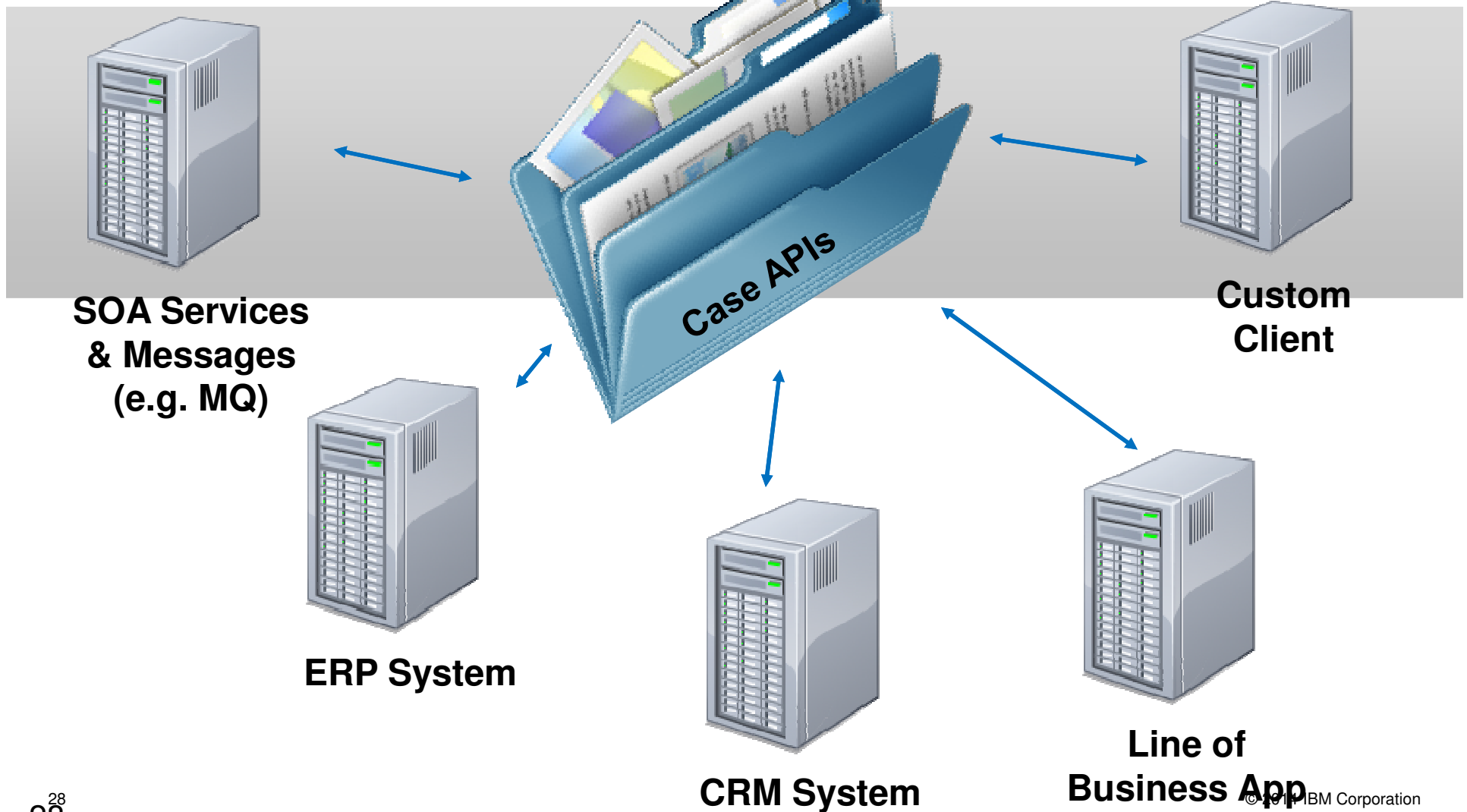


Client Customization and UI Widgets

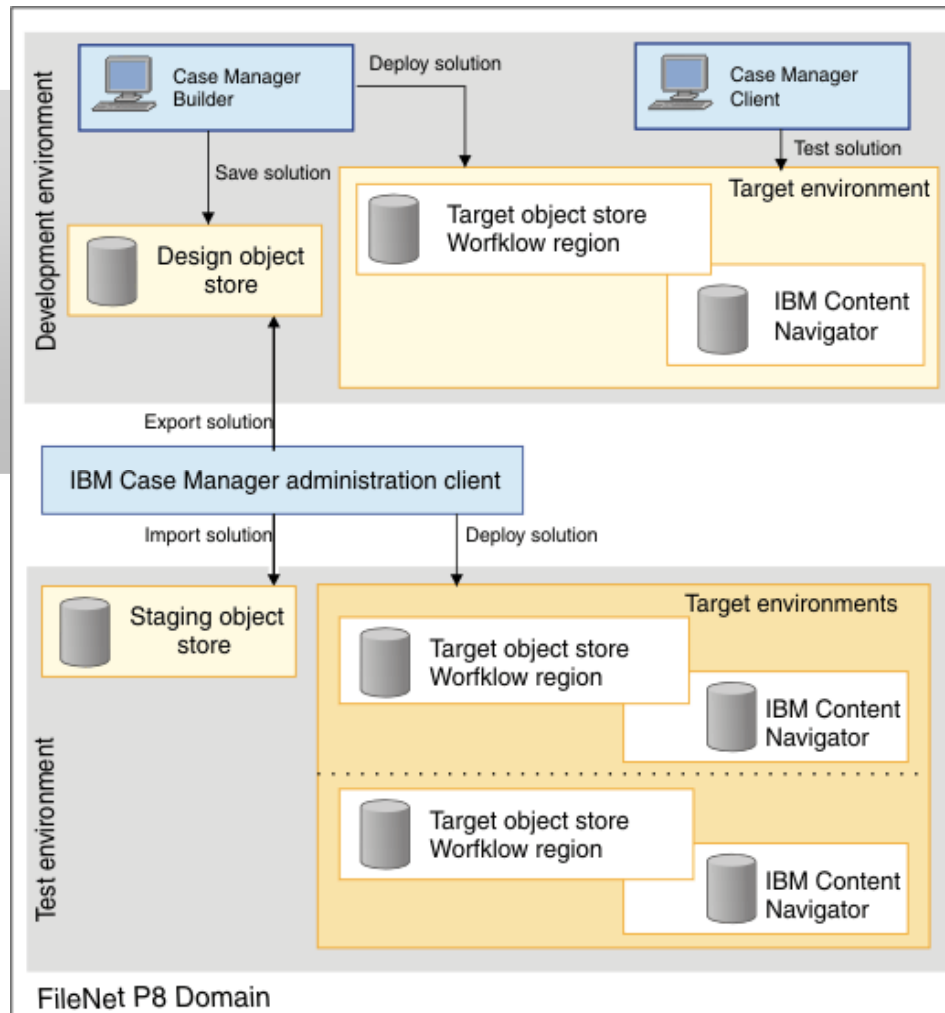


- **Customizable component based UI**
Standard page layouts can be modified using drag and drop
- **Custom page widgets can be added to solution pages**
Display other data or create custom actions to meet unique business requirements
- **Custom page widgets can be reused in other ICM solutions**
Once developed, they can be easily added to any page

Case Manager APIs (REST, WS, Java, .NET)

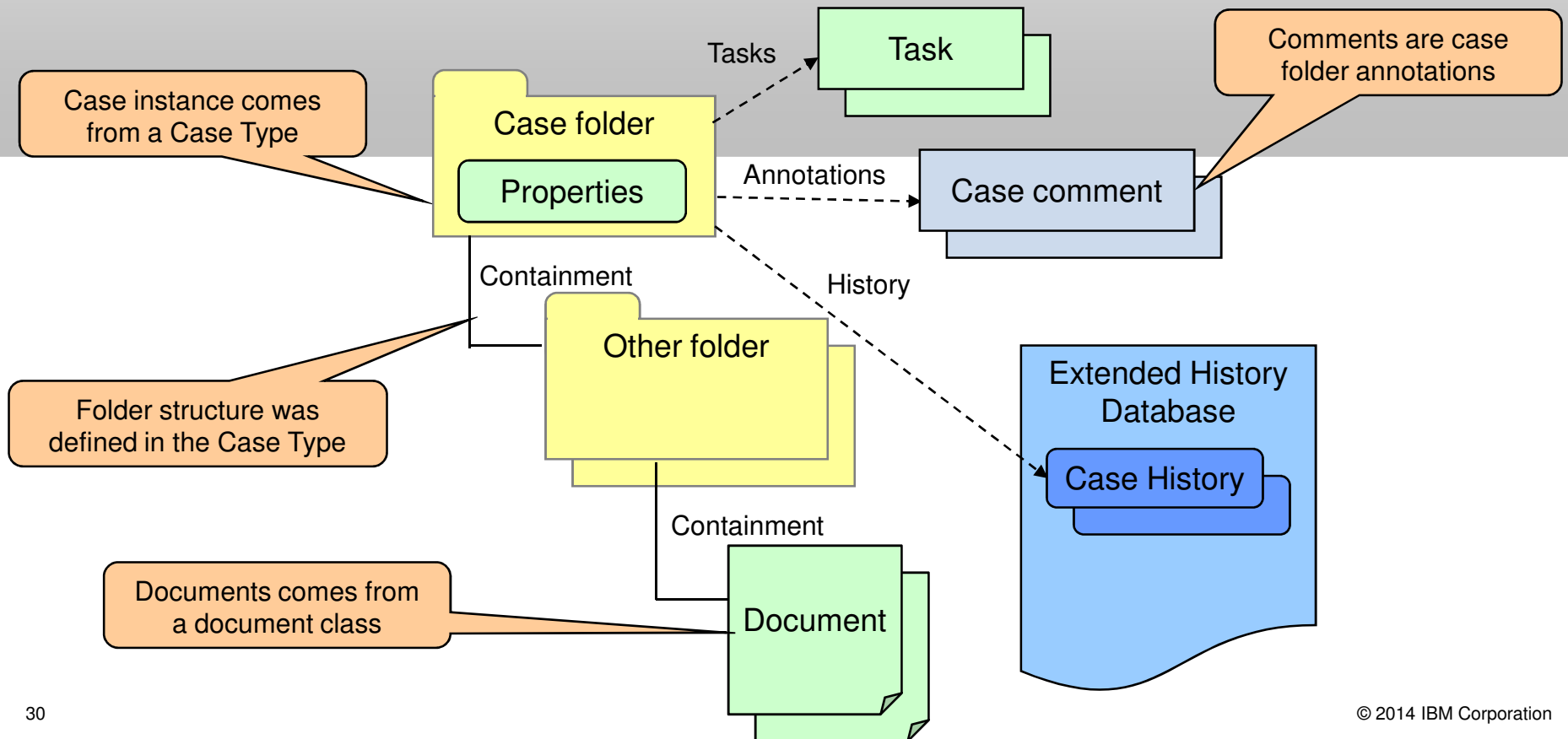


Deployment Architecture / Model

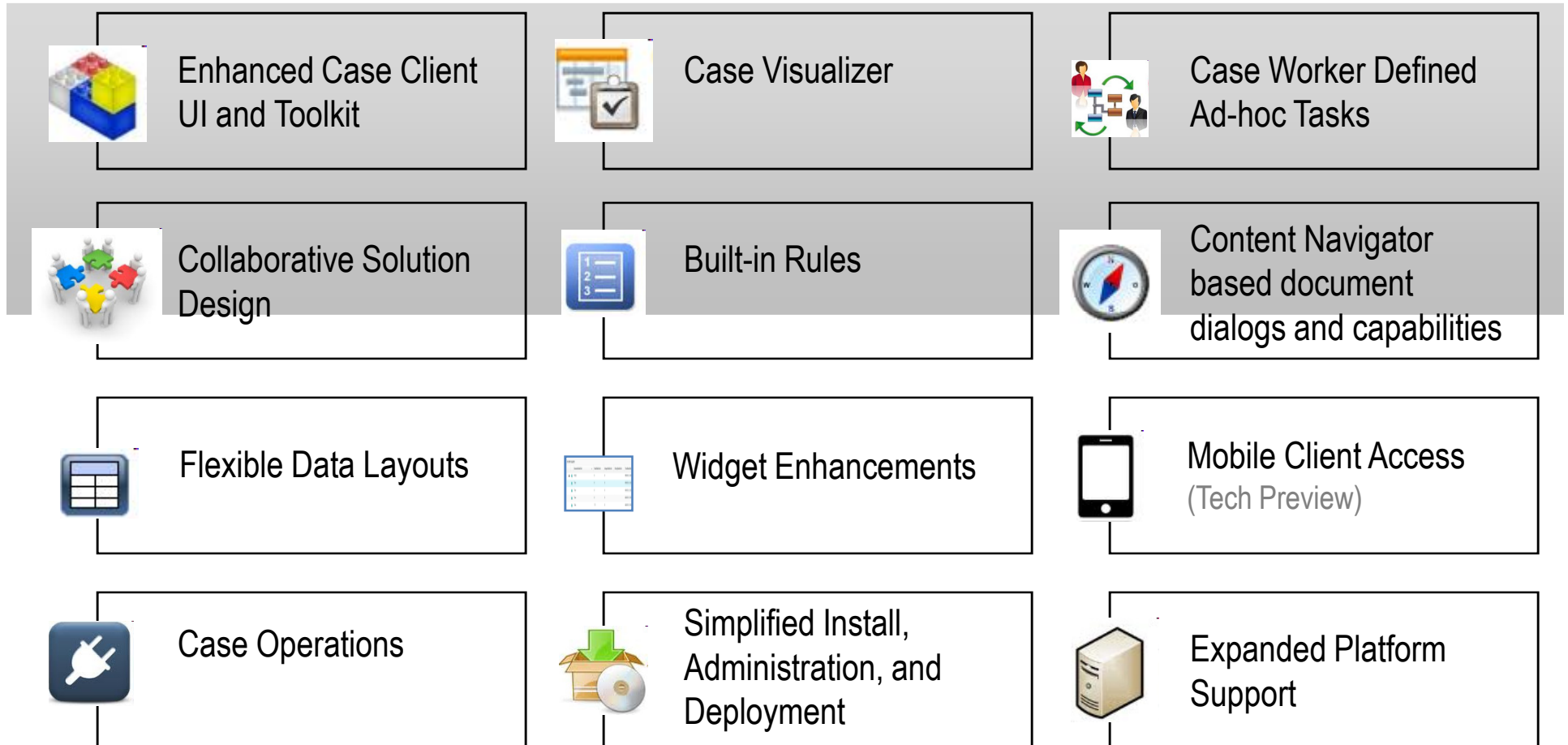


ICM Case Instance – Persistable, Auditable, Long Lived

- Cases are persisted as content in a folder structure in the underlying ECM repository
- Case data lives on long beyond any individual task or action in a case
- All content management functionality can be applied to the case and its content



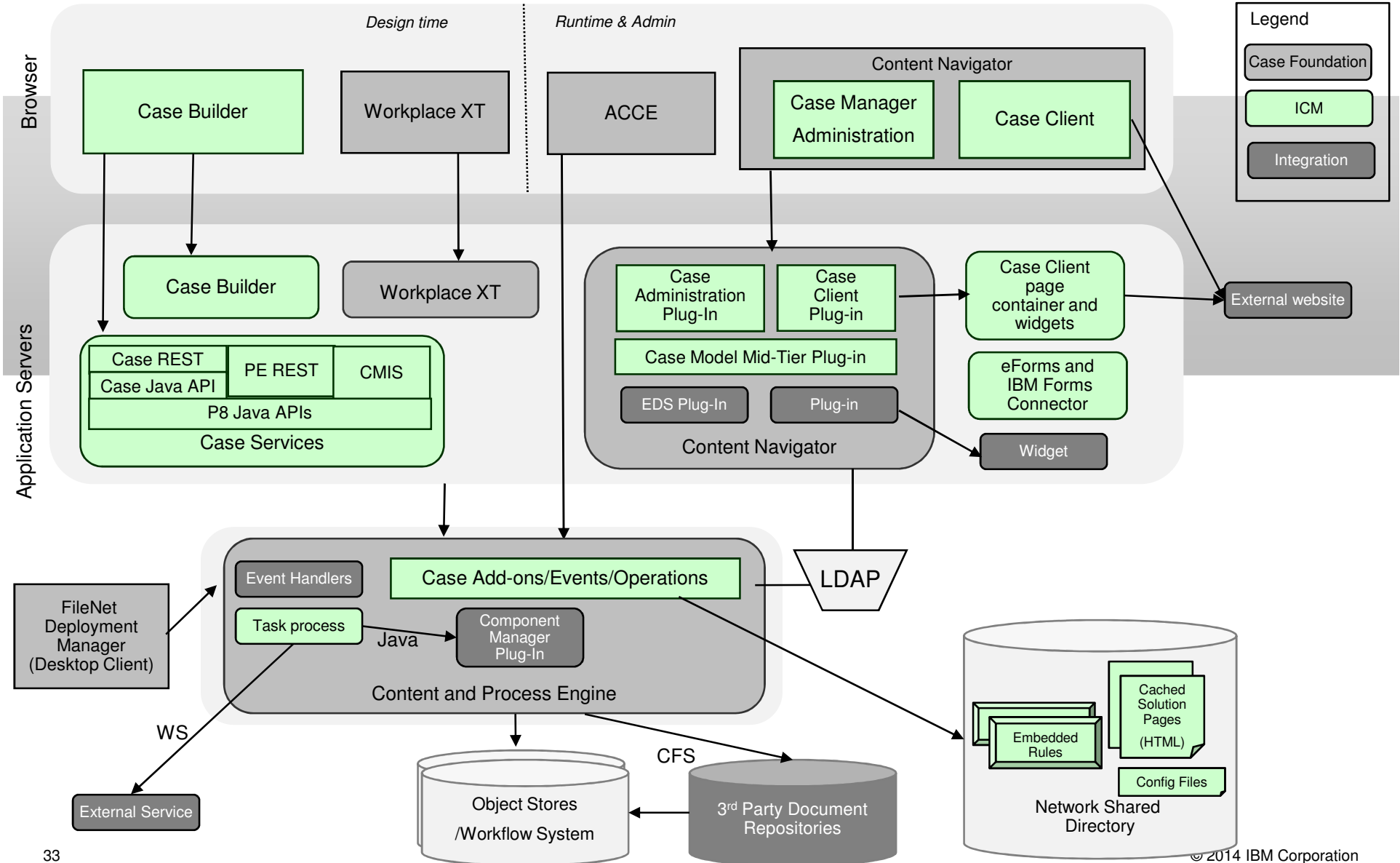
IBM Case Manager 5.2 – What's New



Built on the FileNet 5.2 Platform - New capabilities

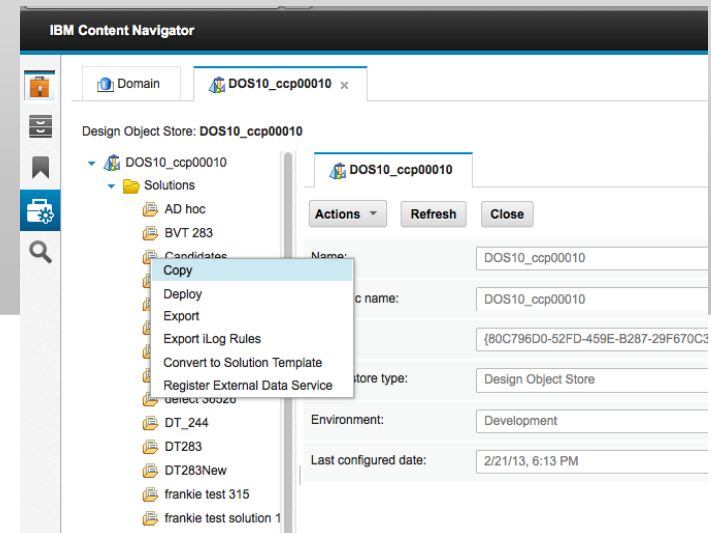
- Enterprise manageability
 - Significant reduction in effort and cost to plan, install and maintain ECM services for enterprise scale deployments and high value solutions
 - Unified Content and Process server (CPE)
 - Single installer for CPE
 - Web-based administration
- IBM FileNet Content Manager 5.2
 - Time and event based document retention
 - Bulk storage migration
 - Document compression
 - Content search optimization
 - Social content management
- IBM Case Foundation 5.2 (new name for IBM FileNet Business Process Manager)
 - Component manager runs in the CPE server
 - Case Analyzer and Case Monitor run in CPE server and support additional platforms
 - New capabilities to support IBM Case Manager 5.2

Case Manager 5.2 Architecture / Integration Points



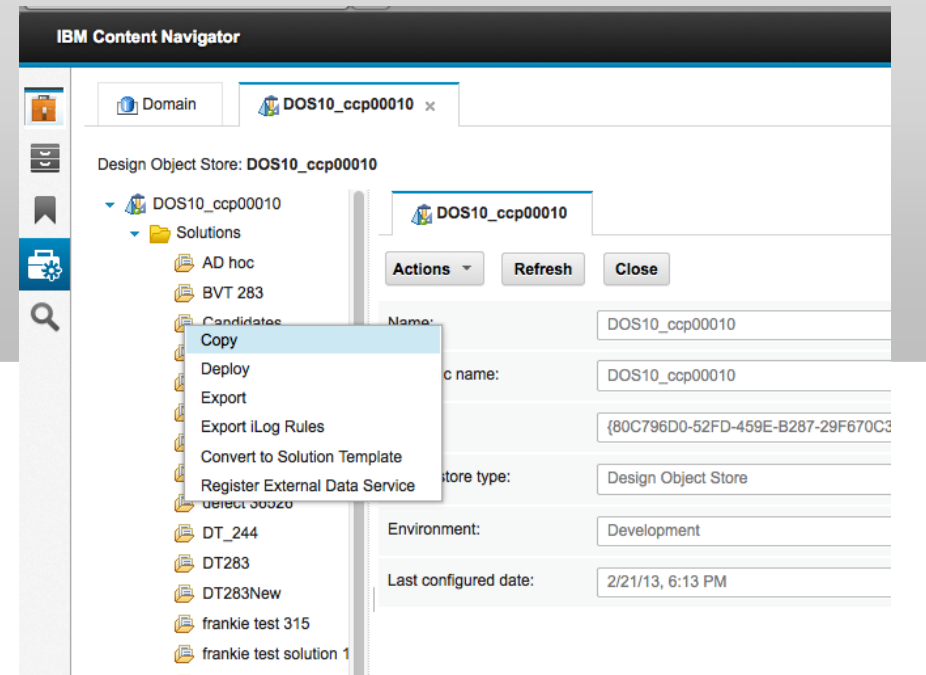
Case Manager - Simplified Install and Deployment

- Installation and configuration simplification
 - CPE platform convergence simplifies installation and HA/DR configuration
 - Removal of Business Space for the user interface components removes an installer and simplifies HA/DR configurations
- Solution deployment simplification
 - Moving solutions between dev/test/prod environments improved
 - Security configuration wizard
 - Audit history configuration wizards
 - Streamlined by removal of Business Space
 - Ability to update existing cases with changes that are made to the solution task definitions



Web-based Administration

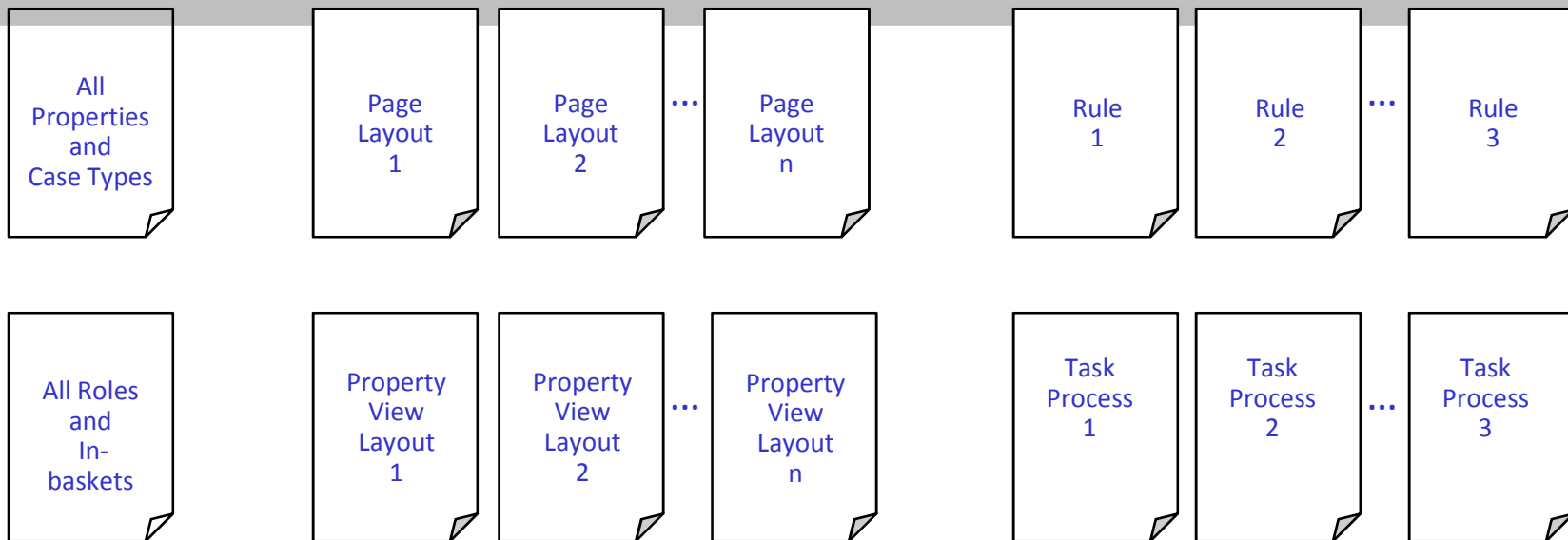
- Web-based CPE Administration to replace FileNet Enterprise Manager
- IBM Case Manager Administration client
 - Web-based
 - IBM Content Navigator plug-in
 - Features include
 - Deploy solution
 - Copy solution
 - Manage project areas
 - Promote solution to template
 - Export solution
 - Security configuration wizard
 - Audit/History configuration wizard



Collaborative Solution Design

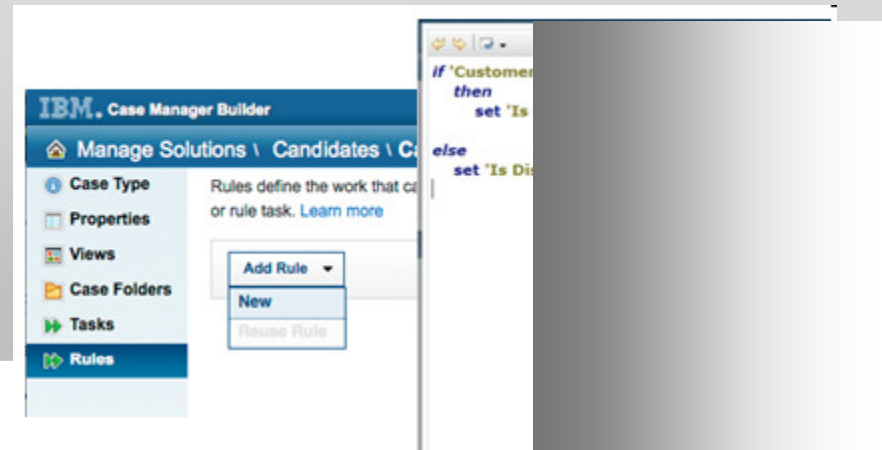
- Multi user access to the solution removes the any bottlenecks due to solutions locked by a single user
- Changes are saved as drafts until you are ready to update the shared solution

Solution artifacts that can be edited concurrently



Built-in Rules

- Ability to define rules in case builder makes it easier for the Business Analyst to author and deploy rules without the need for learning and using separate tools.
- Provides both natural language and rule table styles
- Separate installation and administration of the ILOG platform is no longer required.
- Utilizing rules within the Case Builder is simplified for authoring and utilization within tasks
- Ability to export rules to full featured IBM Operational Decision Manager (ODM)



	Grade	Amount of loan	Insurance required	Insurance rate
1	A	< 100000	false	
2	A	[100000, 300000[true	0.001
3	A	[300000, 600000[true	0.003
4	A	≥ 600000	true	0.005
5	B	< 100000	false	
6	B	[100000, 300000[true	0.0025
7	B	[300000, 600000[true	0.005
8	B	≥ 600000	true	0.0075
9	C	< 100000	true	0.0035
			true	0.006
			true	0.0085
			true	0.0145

if
 (the loan grade in 'the loan report' is not empty)
and all of the following conditions are true :
 - (the loan grade in 'the loan report' is "C")
 - (the amount of 'the loan' is less than 100000) ,
then
 set insurance required in 'the loan report' to **true** ;
 set the insurance rate in 'the loan report' to 0.0035 ;

Case Builder Integrated Page Design

The screenshot displays the 'Case Manager Builder' interface. At the top, the title bar shows 'Case Manager Builder' on the left, 'Intgpeadmin' and a refresh icon in the center, and the IBM logo on the right. Below the title bar is a blue navigation bar with 'Manage Solutions \ Candidates' on the left and 'Locked Items', 'Validate', 'Save', 'Save and Close', and 'Close' buttons on the right.

The main content area is titled 'Candidates' and includes a profile icon, the text 'Lauren's solution LM422', 'Solution prefix: LM422', 'Created by Intgpeadmin', and 'Created on 22 April 2013'. Below this is a descriptive paragraph: 'You define pages at the solution level. Add, edit, copy and delete pages. In Case Manager Client, the pages are shown for the solution. Learn more'.

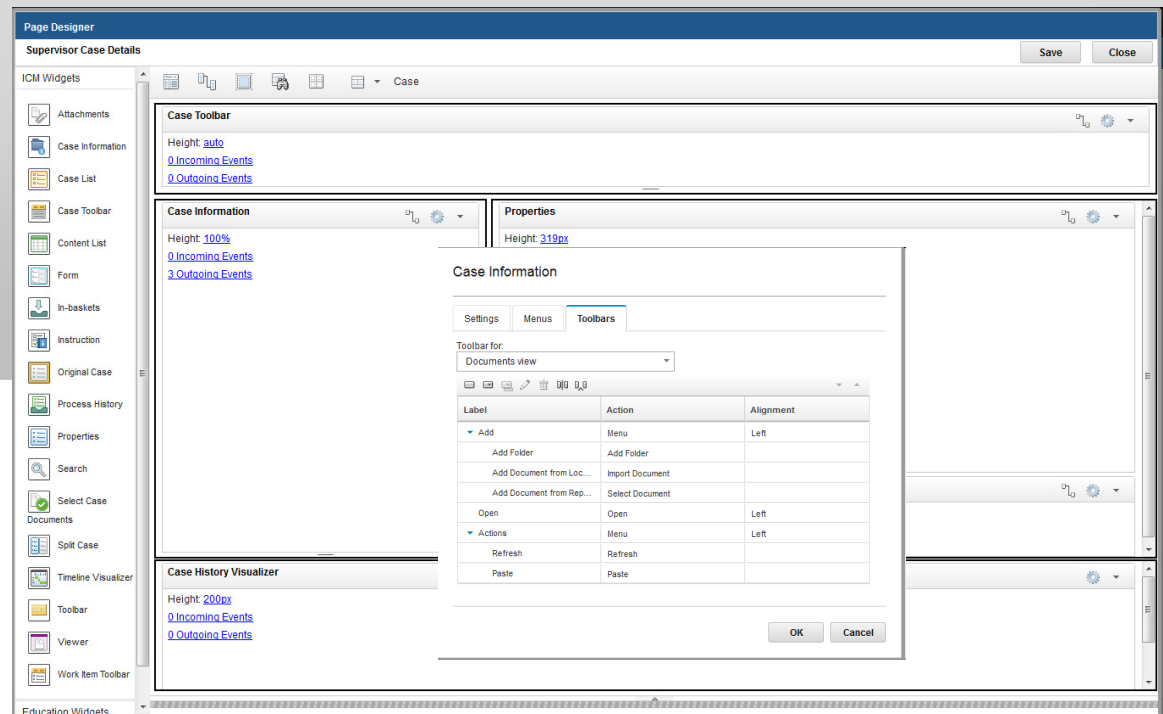
A horizontal tab bar contains 'Properties', 'Roles', 'In-baskets', 'Document Types', 'Pages' (which is selected), and 'Case Types'. Below the tabs is a control bar with an 'Add Page' dropdown and an 'OK All' button.

The main workspace shows a tree view of page categories: 'Solution Pages', 'Case Details Pages', 'Add Case Pages', 'Split Case Pages', 'Add Task Pages', 'Work Details Pages', and 'Custom Task Pages'. The 'Case Details Pages' category is expanded, showing a table with two columns: 'Page Name' and 'Description'. The table contains two entries: 'Case Details' and 'Case Details Form', both with descriptions 'View and update the properties for a ...'.

Page Name ^	Description ^
Case Details	View and update the properties for a ...
Case Details Form	View and update the properties for a ...

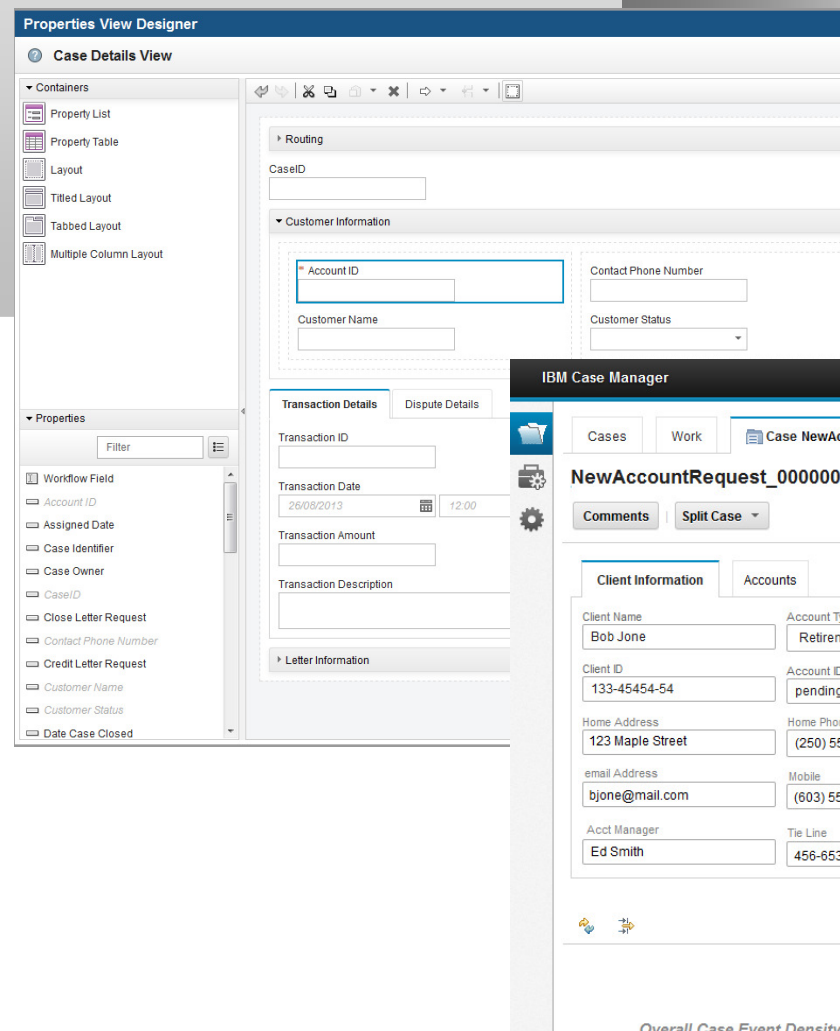
Integrated Page Designer

- Solution page design is now completely integrated into Case Builder
- Provides a palette of both ICM provided page widgets and any custom page widgets added to system
- Includes point and click settings for easy widget customization
- Widget event wiring with powerful javascript integration options allows for even more advanced customizations
- All pages are now part of the solution package and are deployed automatically



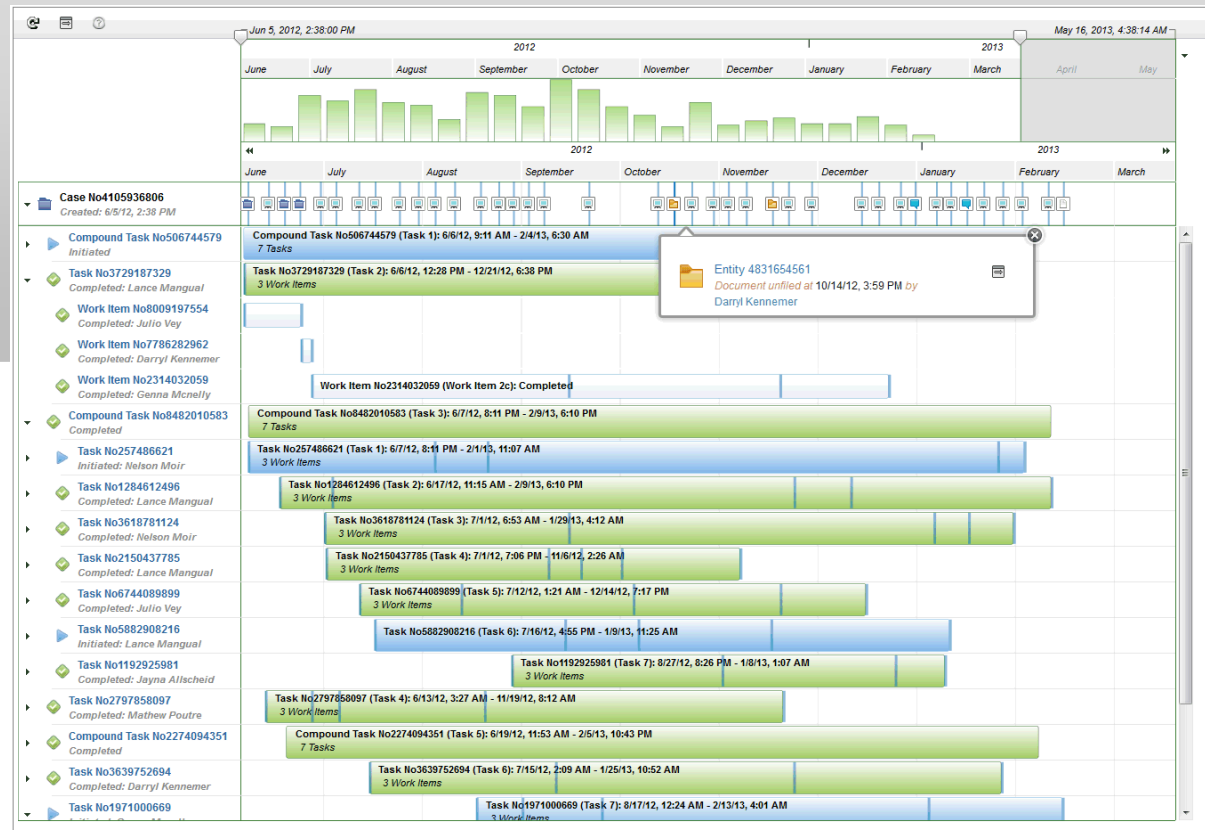
Integrated Data Layout Designer

- An integrated case data layout designer allows more efficient presentation of case data without having to use more flexible, but loosely coupled, external tools
- Multiple layouts can be created to provide different data views for case add, case details and work details
- Display and editing of multi value, repeating data such as dependant information or vehicle year, make and model
- Additional data entry and formatting options for each field type
- Continued support for use of advanced form templates



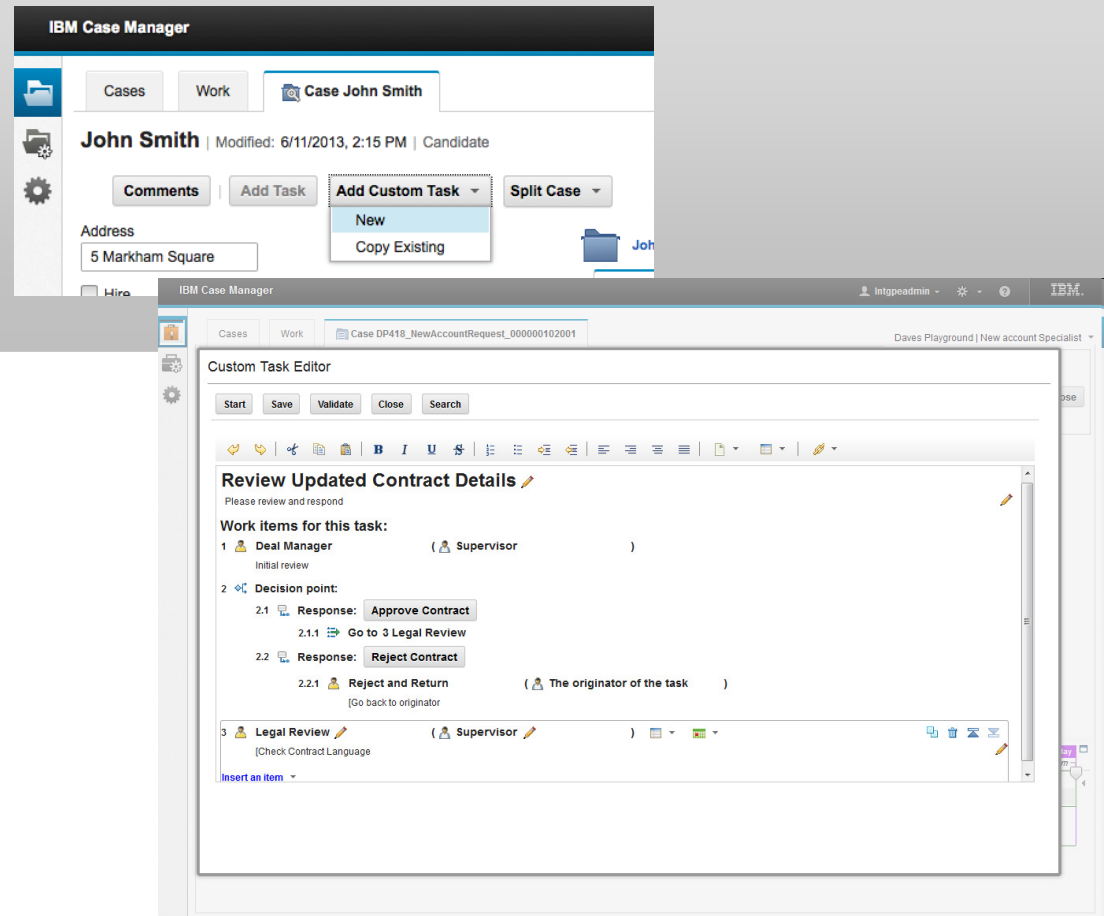
Case Visualizer and History

- Highly visual, easy to use, case timeline that gives case workers a one stop overview of what's happening in the lifecycle of a case
- Provides more visibility into state of tasks and the work items behind them
- Includes a new history snapshot feature that allows you to inspect the state of a case at any moment in time and easily discover changes that were made



Case Worker Dynamic Custom Tasks

- Authorized case worker can define a sequence of actions that need to be performed on a case
- Supports use cases where the task flow is not well understood/known ahead of time
- Intuitive outline style text-based editor, enables defining work for humans
- The user is also able to copy and modify existing custom tasks when creating new ones



Enhanced Case Client UI and Toolkit

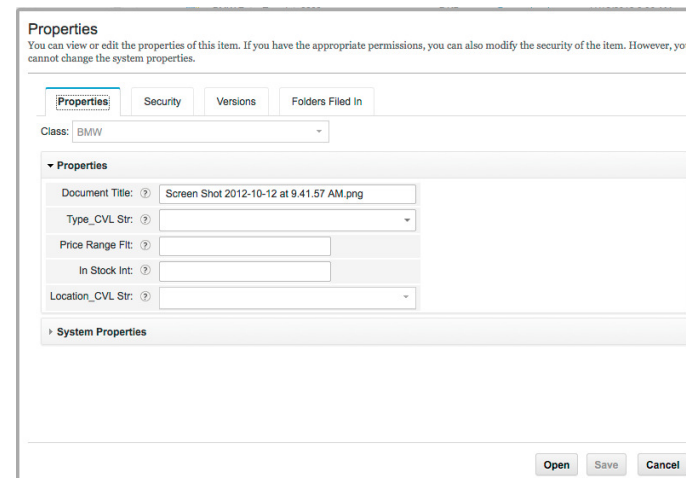
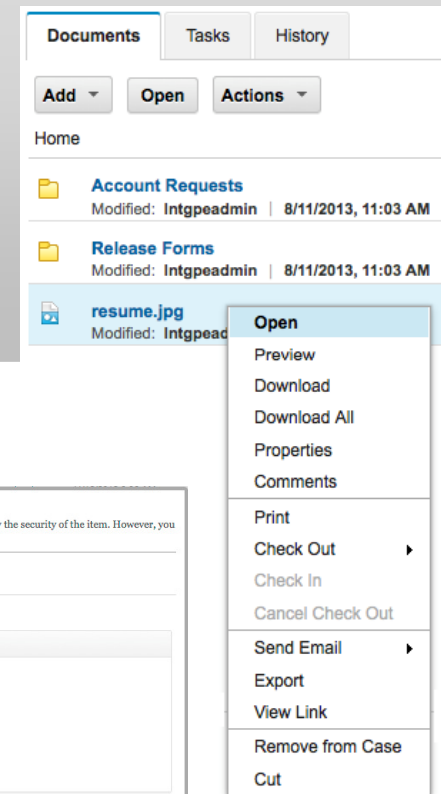
- Updated case client application
- More tightly integrated solution UI design that requires fewer tools and offers additional configuration options
- Provide multiple levels of application customization to enable rapid solution development
 - Extensible by Business Analysts using Case Builder
 - Extensible by web developers using the ICM and ICN JavaScript Toolkits
- Improved Case Client performance
- Built on the IBM Content Navigator framework, it uses an architecture and component technology that is open and familiar to our customers

The screenshot displays the IBM Case Manager interface for a specific case. The top navigation bar shows the user 'Intgpeadmin' and the case ID 'Case NewAccountRequest_000000102001'. The main content area is divided into several sections:

- Client Information:** Fields for Client Name (Bob Jone), Account Type (Retirement), Client ID (133-45454-54), Account ID (pending), Home Address (123 Maple Street), Home Phone ((250) 555-1212), email Address (bjone@mail.com), Mobile ((603) 555-1212), Acct Manager (Ed Smith), and Tie Line (456-653).
- Summary:** A timeline view showing event density from 04/22/2013 to 04/25/2013. The timeline shows a peak in activity on 04/22/2013.
- History:** A list of events including 'Case updated', 'New Account', and 'Task updated', with timestamps and user names.

Content Navigator based document dialogs and capabilities

- Leverage Content Navigator (ICN) user interface component toolkit to provide consistent, familiar document related functionality in Case Manager Client
 - Includes ICN's capability to use External Data Services (EDS) to make entry of document properties faster, easier and more accurate
- Additional information available in the a case document's properties dialog
 - Class properties
 - Versions
 - where filed
 - security
- Multi-select drag & drop from the file-system to add case documents or work item attachments



Widget Enhancements - Case List and Search

- Case List
 - Supports grid view in addition to 'magazine' view
 - Sort on any column
 - Configure Summary view to defines column shown in Case List grid
 - Configure toolbar, in addition to context menus
- Search
 - Configure if users can add additional search criteria in Advanced Search
 - Configure Search view to include system properties to show in search

Title	Added On	Name	Modified On
LM808_NewHire_000000110001	8/11/2013, 11:03 AM	George Jones	8/11/2013, 11:03 AM
LM808_NewHire_000000110002	8/11/2013, 11:04 AM	Rodrigo Guterrez	8/11/2013, 11:04 AM
LM808_NewHire_000000110003	8/11/2013, 11:09 AM	Mallory McPherson	8/11/2013, 11:09 AM

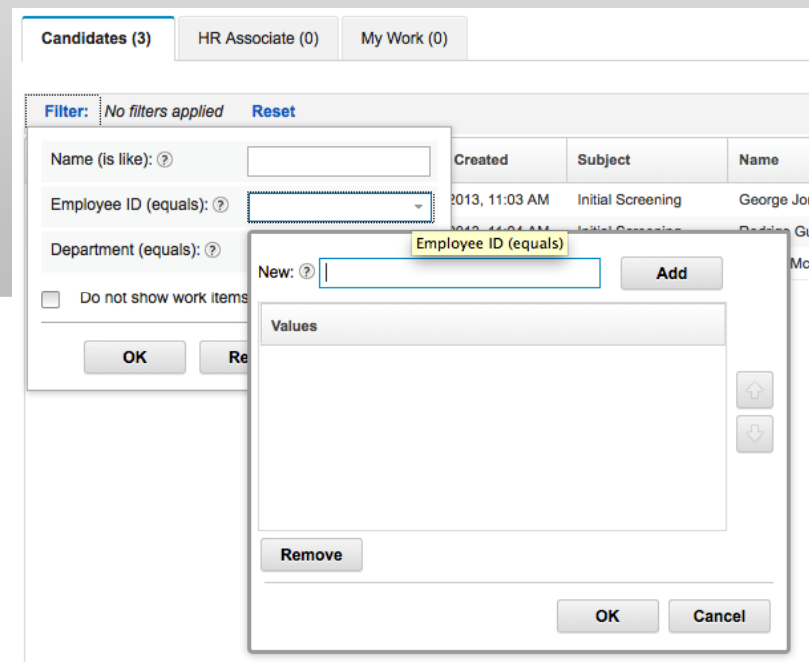
LM808_NewHire_000000110001 Name: George Jones Added On: 8/11/2013, 11:03 AM Modified On: 8/11/2013, 11:03 AM
LM808_NewHire_000000110002 Name: Rodrigo Guterrez Added On: 8/11/2013, 11:04 AM Modified On: 8/11/2013, 11:04 AM
LM808_NewHire_000000110003 Name: Mallory McPherson Added On: 8/11/2013, 11:09 AM Modified On: 8/11/2013, 11:09 AM

The screenshot shows the IBM Case Manager Builder interface. The breadcrumb path is "Manage Solutions \ New Hire Pro... \ New Hire". The left sidebar contains navigation options: Case Type, Properties, Views (selected), Case Folders, Rules, and Tasks. The main area shows the "Case Search" configuration. At the top, it says "Case Title Property: Case ID". Below are three tabs: "Case Summary", "Properties Layout", and "Case Search" (selected). The "Case Search" view is divided into two columns: "Available Properties" and "Properties in the Case Search view".

Available Properties	Properties in the Case Search view
Added by	Name
Case Identifier	Employee ID
Case State	Added On
Modified On	
Modified by	
Address	
Department	
New Hire Status	
Phone	

Widget Enhancements – In-basket

- In-basket columns that display case properties are immediately in-sync with property value changes
- Enable 'OR' conditions
 - All conditions are ANDed together, but you can provide more than one value for a particular filter
- Filter work items based on Case Type
- Option to not show work items locked by other users to streamline what task workers need to see
- Delay in-basket loading until dynamic filter applied
- Additional customizations enabled via Events
 - More flexible dynamic queries in an event, including conditions not included in the user filter



Widget Enhancements - Case Information

- Change the order that the standard panel tabs are displayed
- 'Magazine' or 'Detail' view for case documents
- Embed custom tabs by using the ICM toolkit

The screenshot shows the 'Case Information' settings dialog box. It has three tabs: 'Settings' (selected), 'Menus', and 'Toolbars'. The 'Settings' tab contains the following options:

- Text: "Select the views to display in the Case Information widget and configure the Documents view. [Learn More](#)"
- Checkbox: Display the case ID in the Case Information widget
- Section: "Available Views:"
- Section: "Set tab visibility and set tab order:"
- Table of views with checkboxes and arrows:

View	Visible	Order
Summary	<input type="checkbox"/>	
Tasks	<input checked="" type="checkbox"/>	↑
History	<input checked="" type="checkbox"/>	↓
Documents	<input checked="" type="checkbox"/>	

- Section: "Documents" (expanded)
- Text: "Select the default view:"
- Dropdown menu: Magazine View
- Checkbox: Allow user to switch between views
- Checkbox: Open documents in a separate browser window
- Checkbox: Only show the document types that are defined in the solution

Buttons: OK, Cancel

Mobile Client Built into Content Navigator App

- Enhanced iPad app that provides access to more Case Manager features
- Displays solution pages the way they were designed with mobile tweaks where appropriate
- Leverages IBM Content Navigator mobile architecture



Expanded Platform Support

- Adding new versions of Application Servers
 - WAS 7, 8.0, 8.5
 - Adding Oracle WebLogic 10, 12c
 - Includes all core components
 - Does not extend to components that do not support WebLogic
 - Sametime, IBM Forms, IBM Content Manager
- Qualifying new browser versions
 - Internet Explorer 8, 9, 10
 - FireFox ESR release +
 - Adding Chrome at later date
- Databases
 - DB2 9.7, 10.1
 - SQL 2008, 2012
 - Oracle 11g
- Requires P8 platform 5.2 (IBM Case Foundations 5.2) which brings many new capabilities to ICM

Meeting the Needs of Your Business

- ✓ **ICM brings together data and documents from multiple systems into a single framework**
- ✓ **ICM provides a flexible work environment allowing case workers to progress each case toward a goal.**
- ✓ **ICM brings all information together in context for effective decision making**
- ✓ **ICM is a platform for analytic based decision making for more informed and consistent case outcomes**
- ✓ **ICM provides a full audit record of the information and activities in a case for compliance requirements**
- ✓ **ICM enables business to work collaboratively with IT to design and deploy faster to meet market demands**



Thank You!



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