A Walk-through of IBM Case Manager
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Smarter software for a smarter planet

Enterprise Content Management

Agenda

- **Case Manager Overview**

- Key Capabilities

- Demonstration

- Benefits

Case Management is all about providing context to enable better outcomes

| A solution pattern where… | For challenges such as… | That requires unique capabilities from… |

- There are **collaborative**, ad-hoc processes
- Activities are **event-driven**
- Work is **knowledge** intensive
- **Content** is essential for decision making
- **Outcomes** are goal-oriented
- The judgment of people impact how the **goal** is achieved
- **Process** is often not predetermined

- Complex decision making
- Complaint or dispute management
- Contract management
- Lending applications
- Benefits enrolment
- Rate case management
- …that are both **horizontal** and **vertical** in nature

- Content management
- Business process management
- Collaboration tools
- Social software
- Business rules
- Analytics

Different types of 'Cases' across industries
…. Similar patterns and challenges

Invoice, contract, employee, vendor, customer, project, change request, complaint, exception, incident, audit, eDiscovery, etc.

INSURANCE

- Customer
- Policy
- Underwriting
- Claim
- Annuity

BANKING

- Loan
- Dispute
- Mortgage
- Account
- Credit card
- Personal line
- Investment

HEALTHCARE

- Patient case
- Member
- Provider

GOVERNMENT

- Benefits enrolment
- Grant
- Court case
- Citizen
- Taxpayer

ENERGY

- Rate case
- Claim
- Permit
- Land
- Property

Advanced Case Management Strategy

Advanced Case Management

Case Application Design	Case Templates		Case Tasks	Case Analytics
Case Runtime Framework	Case Infrastructure	360° View of Case	Case Context	Case Lifecycle Management

Content **Events** **Workflow** **Rules** **Collaboration** **Social Software** **Monitoring & Analytics**

people o *process* o *information*

Business benefits

- Better business and IT collaboration to define solutions

- Faster build and deploy times via better tools and solution templates

- Delivering complete case context for case workers with ability to collaborate within case teams

- Optimizing case outcomes thru business rules, cross case analytics, monitoring, and collaboration

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Case Manager Tasks

Tasks are tied to Processes
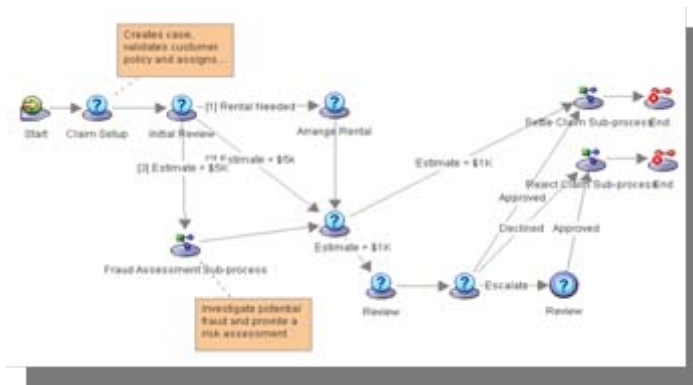
Participants can refine case tasks as they proceed

ACM uses a task-oriented approach to define the structure of a case

Cases and in-baskets reflect the tasks that need to be completed, regardless of where they came from

New tasks can be added to cases on the fly

Tasks can vary in complexity

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Full Case Context

Documents

Forms

Correspondence

Receipts

Statements

History

Case Created
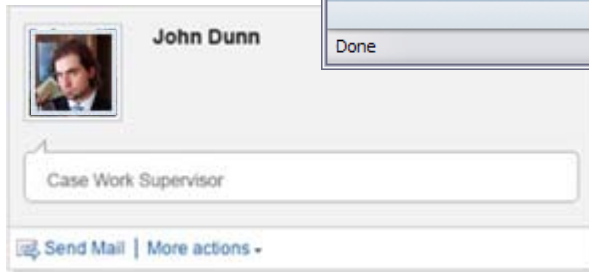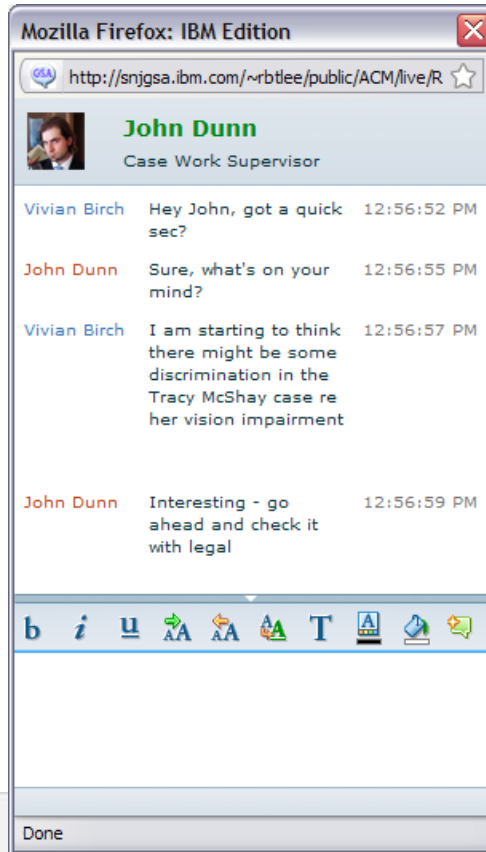
Document Added

Comment

Review started

Properties

Customer Name
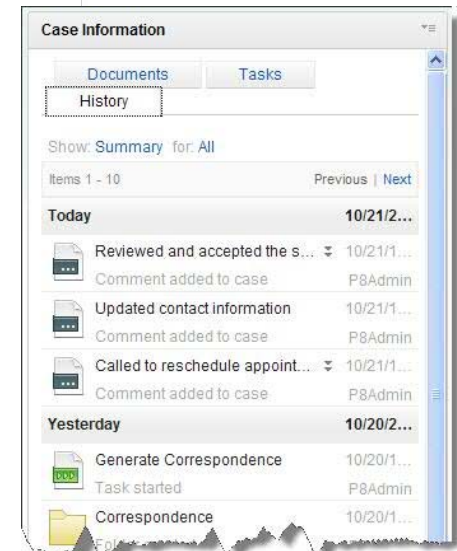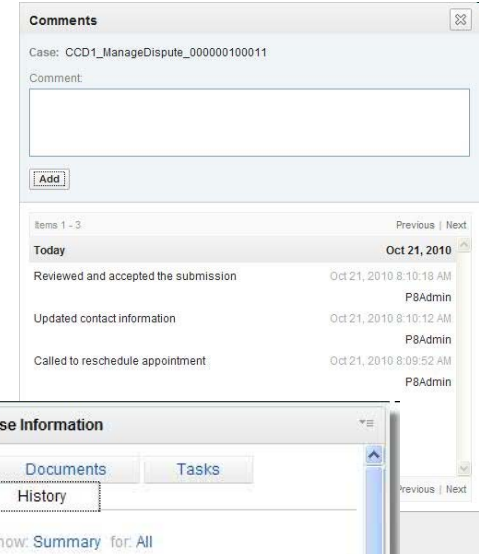
Priority

Transaction IDs

Account Number

Tasks

Initial Case Review

Email the Customer

Investigate Claim

Issue Refund

Cases are Collaborative

Case workers can locate and chat with each other directly through the Case Manager runtime

Shared comments and case history provide context

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Cases are Dynamic

Case Information

Case ID: CCDM_ManageDisputeItem_000000100501

Documents | **Tasks** | History

Add Task

▼ Required (3)

Close Case

Review Dispute Item
Started on 02/01/2011 05:24

Generate Status Letter
Completed on 02/01/2011 05:29

▼ Optional (9)

Add Document

Arbitration

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

Add Task ⊠

Activity type:

Review Case Details ▼

Activity name:

Review Case Details

OK | Cancel

Case Toolbar

Case ID Date modified: **MM/DD/YY** | [Case Type] | Case description goes here even if it's a long description. The description will truncate at the end here...

Comments | Add Task | Close

Case workers can even add new Tasks to a case

# Business Rules Make Case Manager More Dynamic

Rule definition in natural language…

```
if the manager name of the account of 'the payment plan' is "John"
and
    the number of payments of 'the payment plan' is 1
then
    set the discount of 'the payment plan' to 60;
```

Case properties, UI context, and case events can all feed decisions
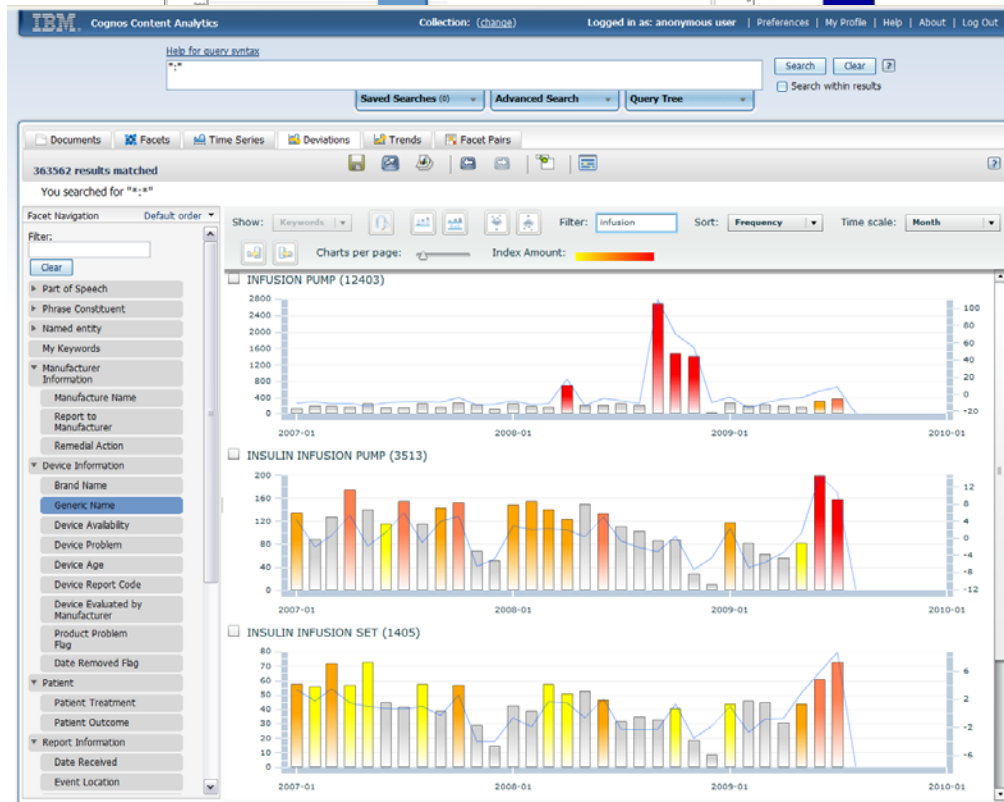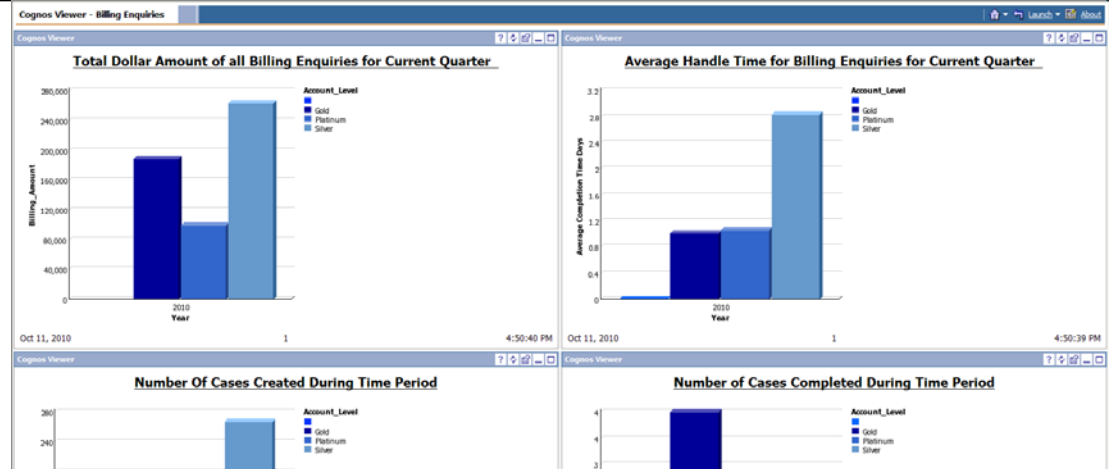
Rules can be changed at runtime, minimizing the need to re-deploy processes and solutions
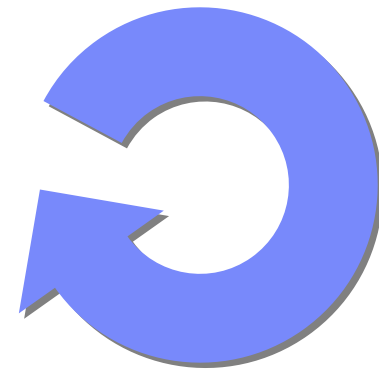
Case Analytics

Out of the box reports and content analytics enable business users to

- **review operational performance and**

- **determine the root causes of inefficiencies**

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File   Edit   View   History   Bookmarks   Tools   Help

IBM 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 ▾   Add Solution

○ From a blank template   ☐ Use the wizard to define the solution

Credit Card Disputes   ●

Solution for managing credit card disputes

Last modified by P8Admin on September 7, 2010   🔒

Edit | Open wizard | Deploy | Test | Remove

Unemployment Claims Process   ●

Unemployment claims process management system

Last modified by P8Admin on September 12, 2010

Law Enformcement   ✓

Law Enforcement management solution

Last modified by P8Admin on September 12, 2010   🔒

Credit Cards JGD v2   ✓

description

Last modified by P8Admin on September 10, 2010

▸ The solution was saved and closed.

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- **Benefits**

Business benefits

- Better business and IT collaboration to define solutions
  - New Case Builder bringing case asset definition into a single place

- Faster build and deploy times via better tools and solution templates
  - Deploy to sandbox from Case Builder
  - Packaging of a solution into a simple, repository-independent structure

- Delivering complete case context for case workers with ability to collaborate within case teams
  - Case Object Model, Out of the box runtime, Customizable widget approach

- Optimizing case outcomes thru business rules, cross case analytics, monitoring, and collaboration
  - Integration of ILOG, ICA and Cognos RTM, SameTime

Thank You!