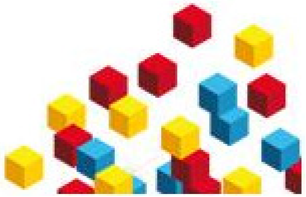
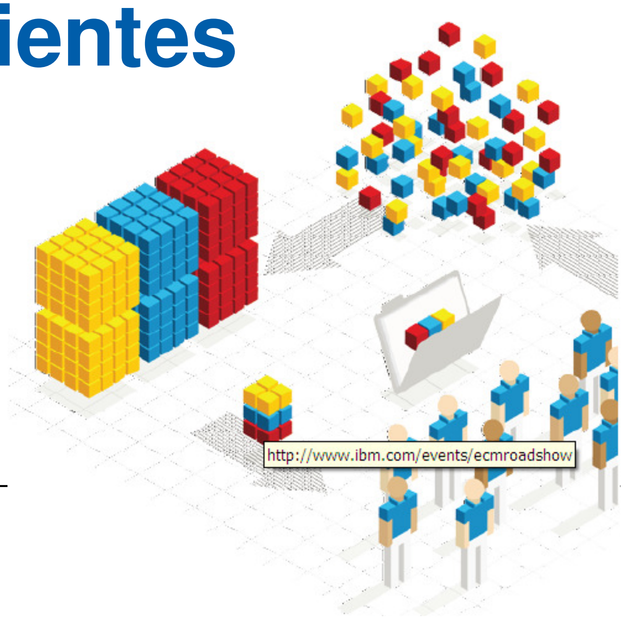


Roadshow ECM 2010

Novedades en la suite ECM de IBM Gestión Avanzada de Expedientes

Francisco J. Izquierdo
Client Technical Professional

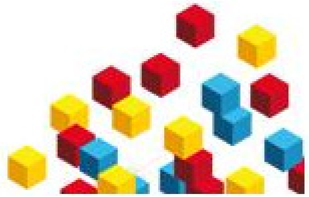

http://www.ibm.com/events/ecmroadshow

Gestione y maximice sus contenidos para evitar el caos. Hágase con el control.

IBM Disclaimer

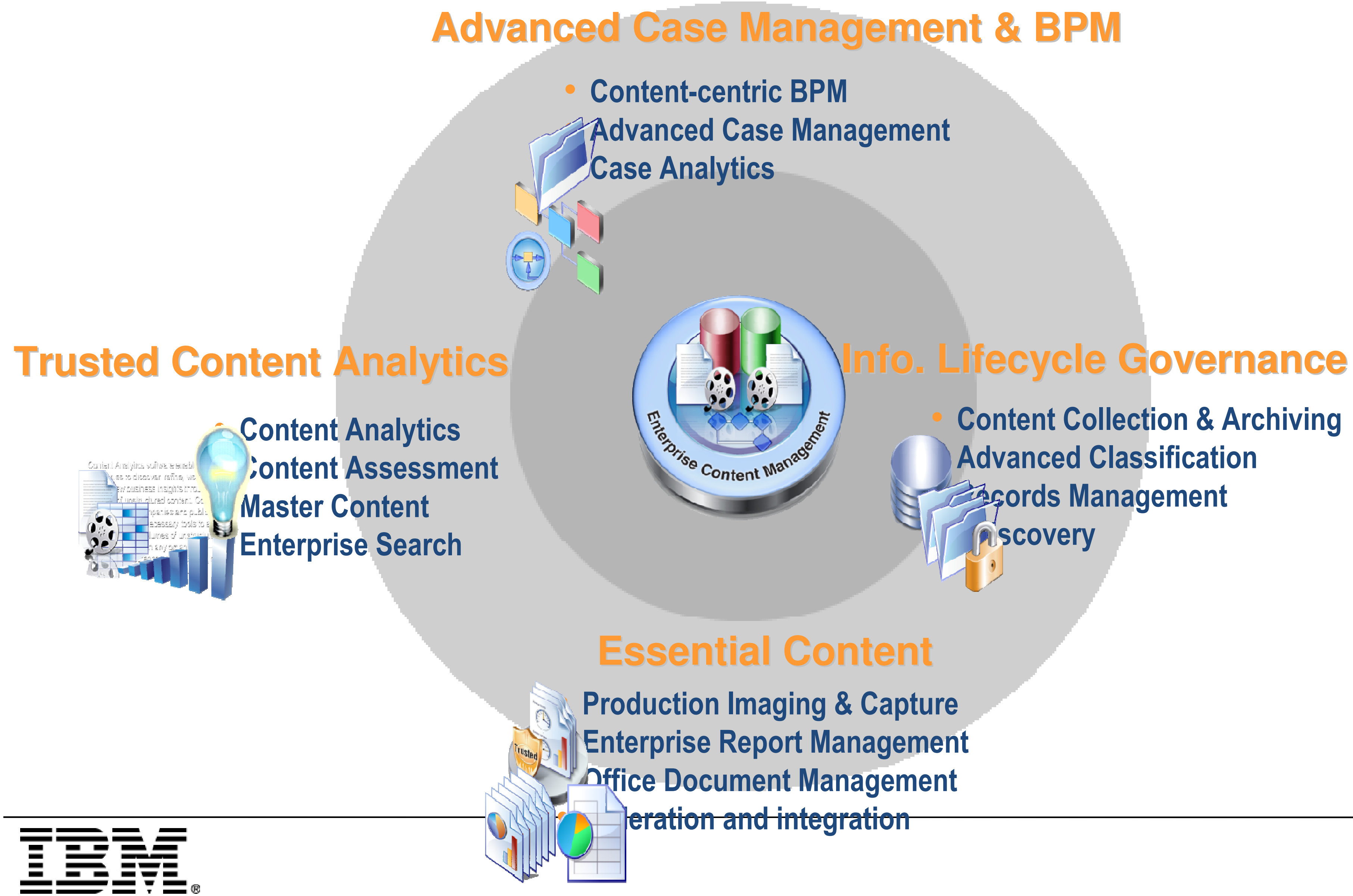
Information regarding potential future products is intended to outline our general product direction and it should not be relied on in making a purchasing decision. The information mentioned regarding potential future products is not a commitment, promise, or legal obligation to deliver any material, 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



- Portfolio de Productos de la Suite ECM
- Roadmap
- Principales Novedades
- Gestión Avanzada de Expedientes

Las 4 Áreas de Innovación de IBM en ECM



Advanced Case Management & BPM

- Content-centric BPM
- Advanced Case Management
- Case Analytics

Trusted Content Analytics

- Content Analytics
- Content Assessment
- Master Content
- Enterprise Search

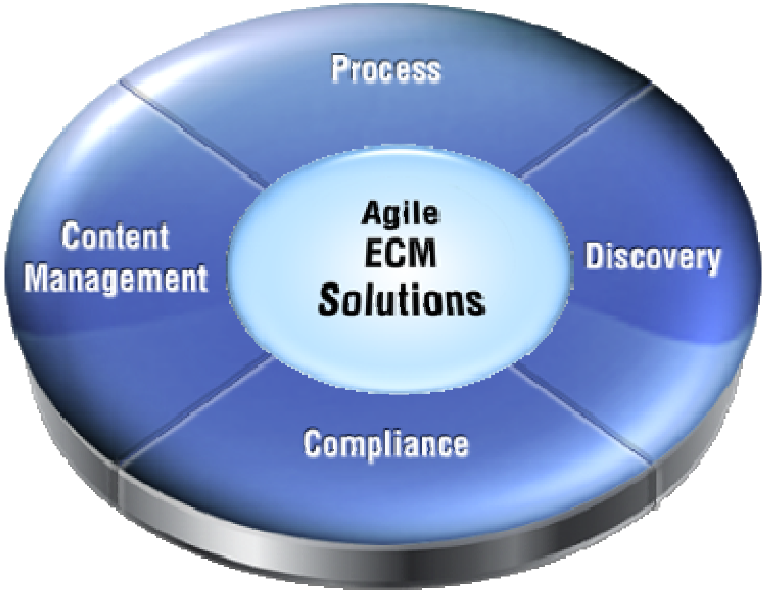
Info. Lifecycle Governance

- Content Collection & Archiving
- Advanced Classification
- ecords Management
- scovery

Essential Content

- Production Imaging & Capture
- Enterprise Report Management
- Office Document Management
- eration and integration

Portfolio IBM Agile ECM


Process
Content Management
Agile ECM Solutions
Discovery
Compliance

Que facilita *la toma de decisiones:*

- Gestionando los contenidos en cualquier formato
- Optimizando los Procesos de Negocio asociados
- Incorporando capacidades de eDiscovery y cumplimiento de Normativa
- Y añadiendo inteligencia a los contenidos

Una plataforma unificada para la gestión de contenidos, procesos, eDiscovery y cumplimiento de normativas

IBM ECM

Productos Liberados En 2008/2009

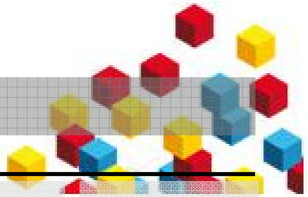
2008				2009			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
OnDemand i5 6.1	SharePoint for P8 2.2	P8 Records Mgr 4.5	P8 4.5	OnDemand z/OS 8.4.1	P8 UIs Web Parts 2.2.1	P8 UIs Workplace XT Office Intg 1.1.4	Content Collector 2.1.1
ISRA 3.4	Workplace XT 1.1.2	CommonStore SAP 8.4	CFS 4.5	IBM Records Mgr 8.5	Content Integrator 8.5.1	P8 4.5.1	P8 Records Manager 4.5.1
OmniFind 8.5 Enterprise Ed.	Capture 5.2	eDiscovery Manager 2.1	BAM 4.5			ECM Widgets 4.5.1	Content Analytics 2.1
	Process Engine 4.0.3	eDiscovery Analyzer 2.1	CM 8.4.1			CM 8.4.2	Master Content Bridge 1.0
	IBM Records Mgr 8.4	OmniFind 8.4.1 Discovery Ed.	OnDemand MP 8.4.1			DM 8.4.2	
	Email Manager 4.0.2	Content Analyzer 8.4.2	Workplace XT 1.1.3			eDiscovery Manager 2.1.1	
	Records Crawler 4.0.2		WEBi 1.0.3			eDiscovery Analyzer 2.1.1	
			ECM Widgets 4.5			Classification Module 8.7	
			Quickr for ECM 1.0			IBM Records Mgr z/OS 8.5	
			Content Integrator 8.5				
			Image Services 4.1.2				
			Content Collector 2.1				
			Classification Module 8.6				

ECM
Roadmap

🟩 Released 🟦 Projected

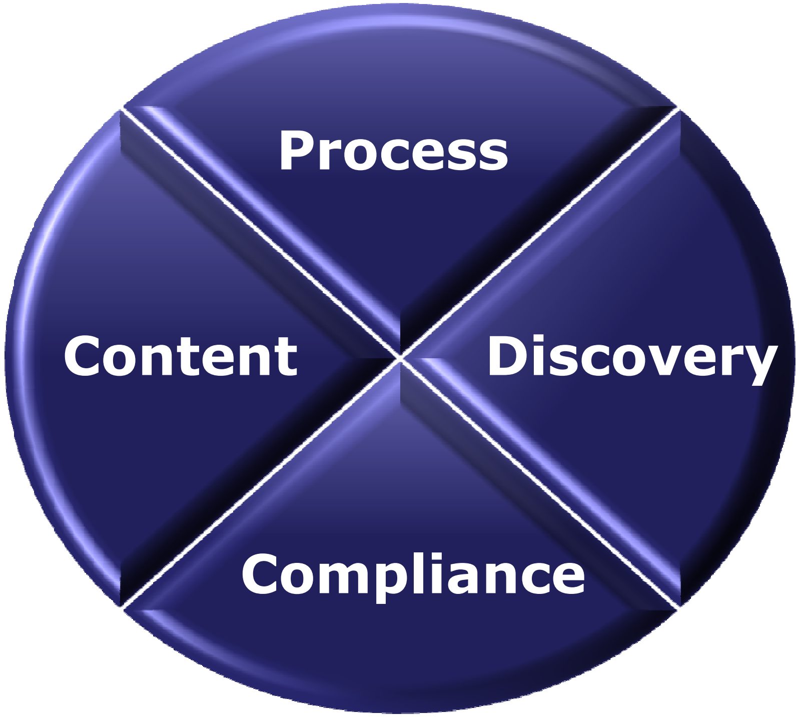
Versiones Proyectadas 2010/2011

2010				2011			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
🟩 ECM Widgets 4.5.2	🟩 OnDemand IBM i V7R1	Capture	"ACM" I	OnDemand z/OS	"ACM" II	Enterprise Records	"ACM" III
🟩 WEBi 1.0.4	OmniFind Enterprise Ed.	OnDemand MP	P8	ECM Widgets	Content Manager	Master Content Bridge	P8
🟩 Office Integ 1.1.5		Quickr for ECM	Content Collector		Image Services	System Monitor	ECM Widgets
			eDiscovery		Workplace XT	Quickr for ECM	Content Collector
			Content Analytics		WEBi		eDiscovery
			ICC for SAP		Office Integ		Content Analytics
			Document Manager		IDM		
			System Monitor		Classification Module		
					Content Integrator		

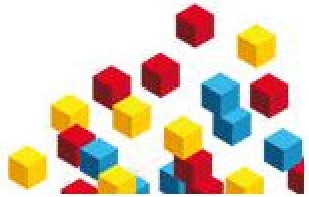


Novedades en el último año

- Más de 20 productos liberados, con mejoras importantes en las funcionalidades básicas
- Mejoras en la calidad y usabilidad de los productos ECM


Process
Content
Discovery
Compliance

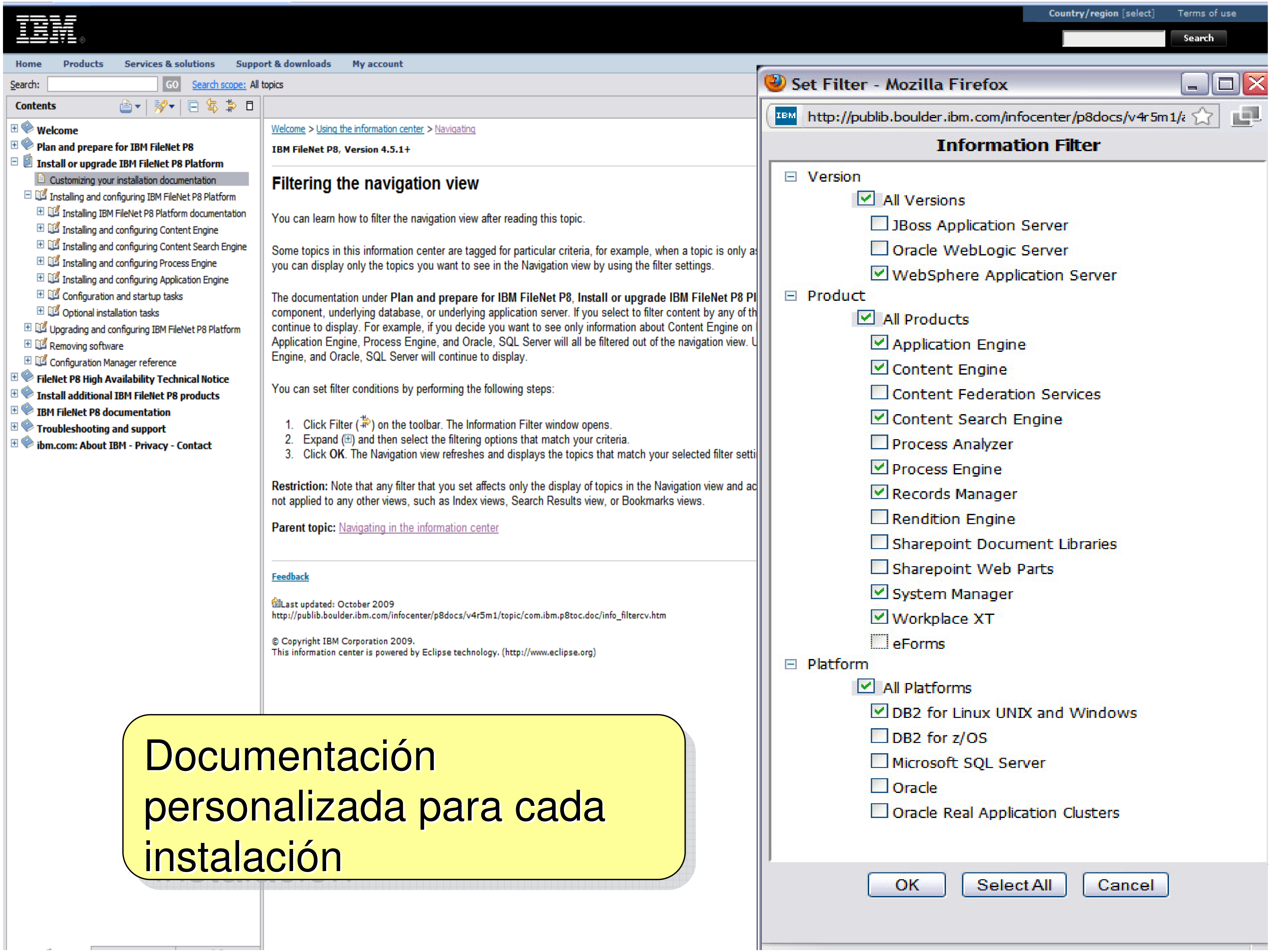
¿Ya hemos planificado el upgrade?



Mejoras de usabilidad significativas

- Reducción del tiempor de instalación de más del 30% entre P8 4.5 y 4.5.1
- Una instalación típica se hace entre 1 y 2 semanas
- Upgrade directo desde versiones a partir de la 3.5.2
- Disponemos de una guía específica para cambio de plataforma de Windows a Unix:
- http://www-01.ibm.com/support/docview.wss?uid=swg21428743
- Toda la documentación de ECM está disponible en el Infocenter de ibm.com
- Generador de documentación dinámico

Reducción en el número de páginas de aprox. el 60%



- Welcome
- Plan and prepare for IBM FileNet P8
- Install or upgrade IBM FileNet P8 Platform
  - Customizing your installation documentation
  - Installing and configuring IBM FileNet P8 Platform
    - Installing IBM FileNet P8 Platform documentation
    - Installing and configuring Content Engine
    - Installing and configuring Content Search Engine
    - Installing and configuring Process Engine
    - Installing and configuring Application Engine
    - Configuration and startup tasks
    - Optional installation tasks
  - Upgrading and configuring IBM FileNet P8 Platform
  - Removing software
  - Configuration Manager reference
- FileNet P8 High Availability Technical Notice
- Install additional IBM FileNet P8 products
- IBM FileNet P8 documentation
- Troubleshooting and support
- ibm.com: About IBM - Privacy - Contact

Welcome > Using the information center > Navigating

IBM FileNet P8, Version 4.5.1+

Filtering the navigation view

You can learn how to filter the navigation view after reading this topic.

Some topics in this information center are tagged for particular criteria, for example, when a topic is only a
you can display only the topics you want to see in the Navigation view by using the filter settings.

The documentation under **Plan and prepare for IBM FileNet P8**, **Install or upgrade IBM FileNet P8 Pl**
component, underlying database, or underlying application server. If you select to filter content by any of th
continue to display. For example, if you decide you want to see only information about Content Engine on
Application Engine, Process Engine, and Oracle, SQL Server will all be filtered out of the navigation view. U
Engine, and Oracle, SQL Server will continue to display.

You can set filter conditions by performing the following steps:

1. Click Filter ( ) on the toolbar. The Information Filter window opens.
2. Expand (⊞) and then select the filtering options that match your criteria.
3. Click **OK**. The Navigation view refreshes and displays the topics that match your selected filter setti

Restriction: Note that any filter that you set affects only the display of topics in the Navigation view and ac
not applied to any other views, such as Index views, Search Results view, or Bookmarks views.

Parent topic: Navigating in the information center

Feedback

Last updated: October 2009
http://publib.boulder.ibm.com/infocenter/p8docs/v4r5m1/topic/com.ibm.p8toc.doc/info_filtercv.htm

© Copyright IBM Corporation 2009.
This information center is powered by Eclipse technology. (http://www.eclipse.org)

Set Filter - Mozilla Firefox
http://publib.boulder.ibm.com/infocenter/p8docs/v4r5m1/

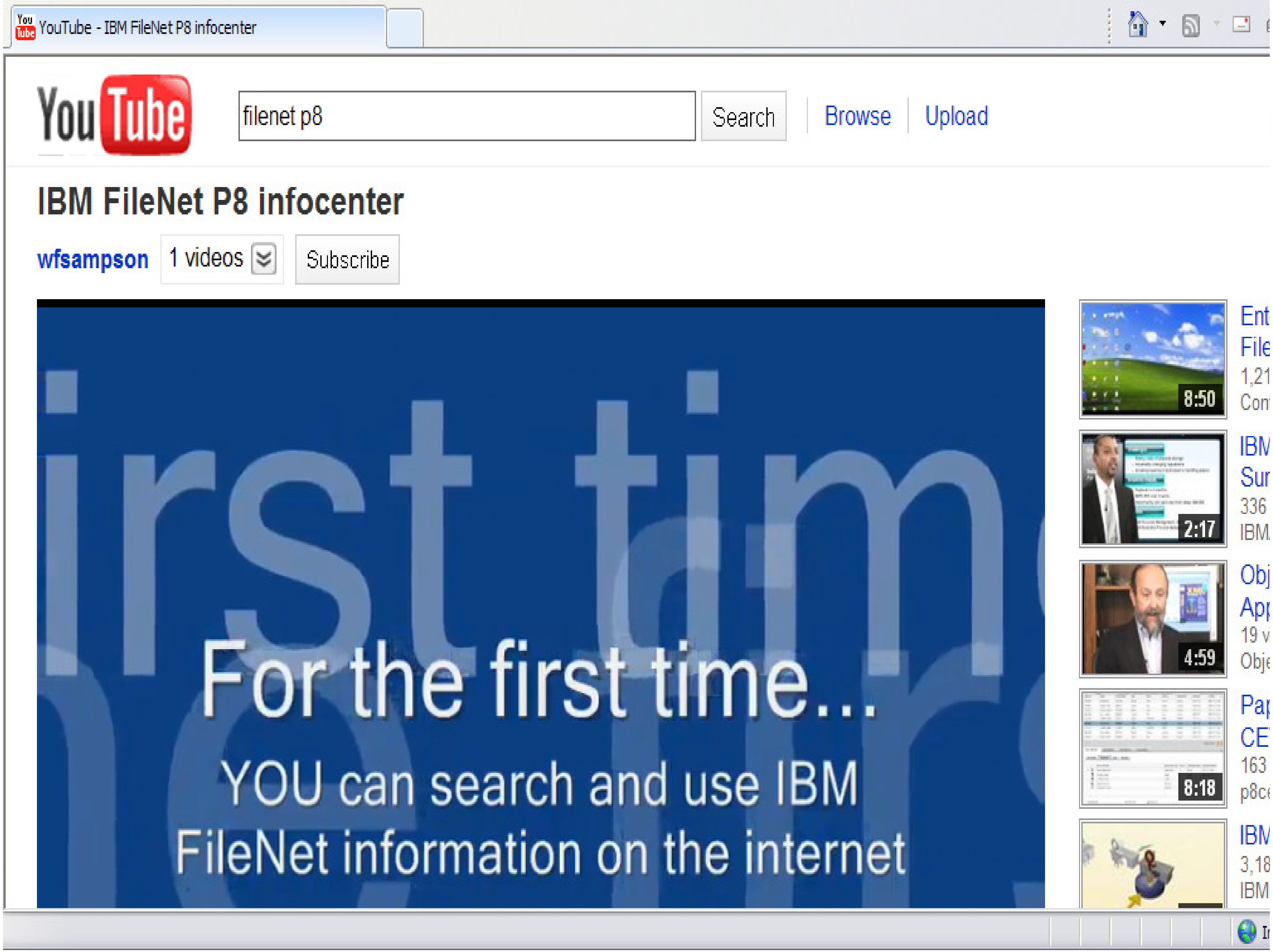
Information Filter

⊟ Version
- ☑ All Versions
  - ☐ JBoss Application Server
  - ☐ Oracle WebLogic Server
  - ☑ WebSphere Application Server

⊟ Product
- ☑ All Products
  - ☑ Application Engine
  - ☑ Content Engine
  - ☐ Content Federation Services
  - ☑ Content Search Engine
  - ☐ Process Analyzer
  - ☑ Process Engine
  - ☑ Records Manager
  - ☐ Rendition Engine
  - ☐ Sharepoint Document Libraries
  - ☐ Sharepoint Web Parts
  - ☑ System Manager
  - ☑ Workplace XT
  - ☐ eForms

⊟ Platform
- ☑ All Platforms
  - ☑ DB2 for Linux UNIX and Windows
  - ☐ DB2 for z/OS
  - ☐ Microsoft SQL Server
  - ☐ Oracle
  - ☐ Oracle Real Application Clusters

Documentación personalizada para cada instalación


YouTube - IBM FileNet P8 infocenter
filenet p8
Search
Browse
Upload
1 videos
Subscribe
8:50
2:17
4:59
8:18

IBM FileNet P8 infocenter

wfsampson

For the first time...

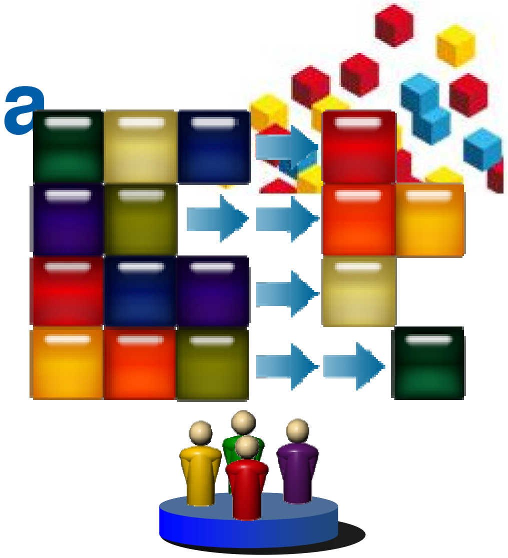
YOU can search and use IBM FileNet information on the internet

Content Management

Novedades en Content Management

- Mejoras en todos los repositorios
- Funcionalidades avanzadas para la publicación de documentación técnica en P8
- Integración con SharePoint y MS Office
- Mejoras en los Uis (Workplace XT y WEBi)
- Funcionalidades colaborativas con Lotus Quickr
- Federación de contenidos en múltiples repositorios
- Integración con Master Data Manag.(MDM)
- Soporte del estándar CMIS

Gestión de Documentación Técnica



Necesidades habituales

- Documentos grandes y complejos
- Múltiples autores, con procesos de revisión y aprobación
- Múltiples idiomas

P8 Content Manager ofrece una solución

DITA
OASIS STANDARD
Use. Reuse.
Specialize.
Collaborate.
Modular content for an integrated world
learn more...

- Mejora del modelo de Documentos Compuestos
- DITA – estándar basado en XML
- Se integra con herramientas de creación como
  - Quark, XMetal y ArborText
- Utilizado por los equipos de documentación de IBM:

800,000 Tópicos DITA

1000 millones de palabras al año

Traducidas a más de 45 idiomas

1500 autores

IBM Microelectronics - manuales de diseño de semiconductores de 400 a 500 páginas

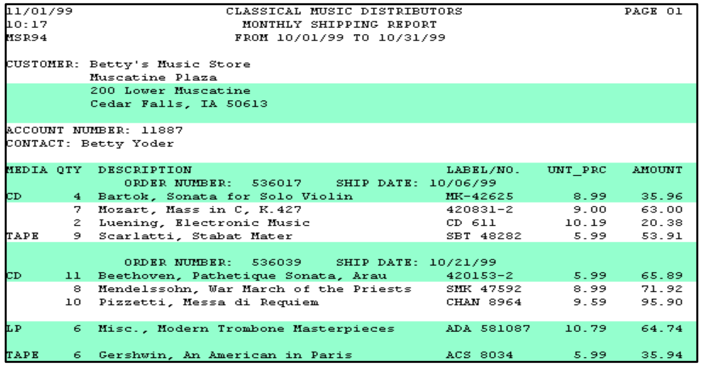
IBM Content Manager 8.4.2 – Agosto 2009

- Integración con FileNet BPM mediante Contenido Activo
- Integración con Enterprise Records
- System Monitoring
- Otras mejoras:
  - Procedimientos de upgrade simplificados, p.e. upgrade directo desde CM 8.3 a 8.4.2
  - Documentación dis`ponible en ibm.com
  - Instalación simplificada sobre Oracle
  - Mejoras en manejo y navegación de los contenidos
  - Gestión mejorada de TableSpaces
  - Búsqueda textual y utilidad batch de carga masiva para la versión z/OS
  - Mejoras en gestión de trazas y logging
  - Redbook de configuración de HA

OnDemand…

Leader indiscutible en Enterprise Report Management!

Diseñado para cargas “masivas” de múltiples documentos estáticos de sólo lectura, p.e. reports de ordenador

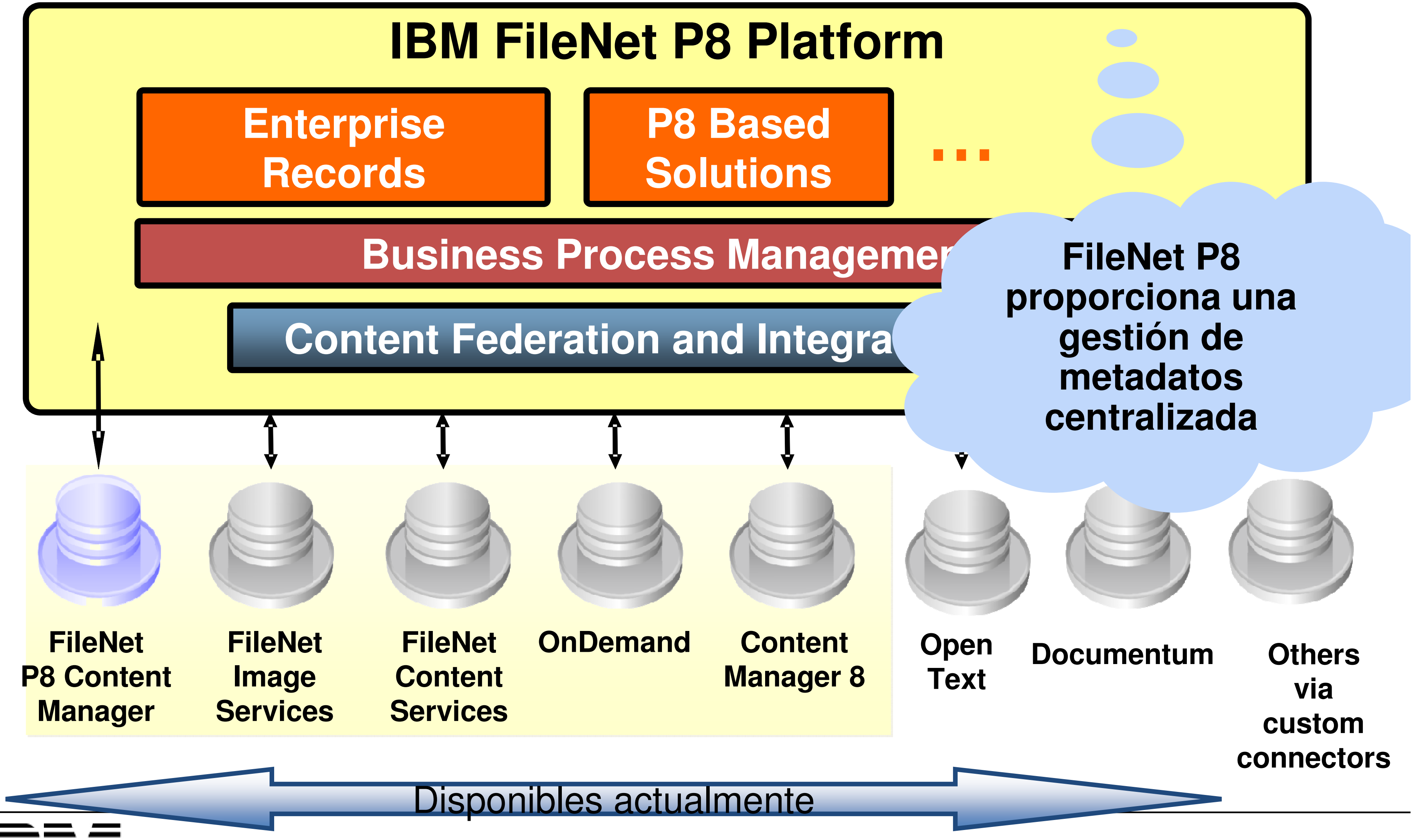


```
11/01/99                    CLASSICAL MUSIC DISTRIBUTORS                      PAGE 01
10:17                         MONTHLY SHIPPING REPORT
MSR94                        FROM 10/01/99 TO 10/31/99

CUSTOMER: Betty's Music Store
          Muscatine Plaza
          200 Lower Muscatine
          Cedar Falls, IA 50613

ACCOUNT NUMBER: 11887
CONTACT: Betty Yoder

MEDIA QTY  DESCRIPTION                               LABEL/NO.    UNT_PRC    AMOUNT
              ORDER NUMBER:  536017    SHIP DATE: 10/06/99
CD      4  Bartok, Sonata for Solo Violin            MK-42625        8.99     35.96
        7  Mozart, Mass in C, K.427                  420831-2        9.00     63.00
        2  Luening, Electronic Music                 CD 611         10.19     20.38
TAPE    9  Scarlatti, Stabat Mater                   SBT 48282       5.99     53.91

              ORDER NUMBER:  536039    SHIP DATE: 10/21/99
CD     11  Beethoven, Pathetique Sonata, Arau        420153-2        5.99     65.89
        8  Mendelssohn, War March of the Priests     SMK 47592       8.99     71.92
       10  Pizzetti, Messa di Requiem                CHAN 8964       9.59     95.90

LP      6  Misc., Modern Trombone Masterpieces       ADA 581087     10.79     64.74

TAPE    6  Gershwin, An American in Paris            ACS 8034        5.99     35.94
```

Novedades de la v. 8.4.1 - Q1 2009

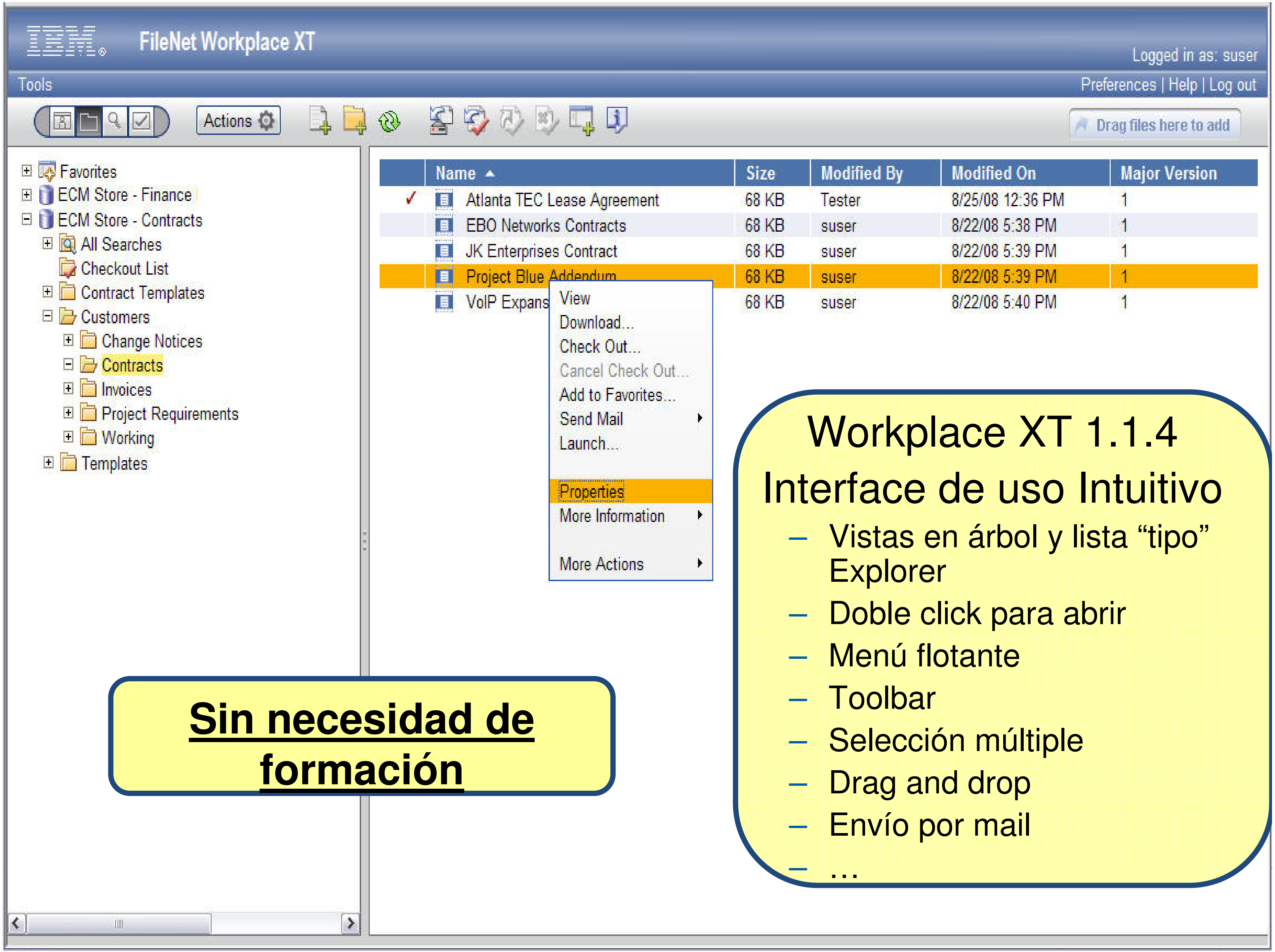
- Integración con P8
  - Enterprise Records
  - Búsqueda y visualización unificada
  - Visualización de AFP y LineData en Workplace XT
  - Documentos de OnDemand como anexos de procesos
- Gestión de retención y eliminación mejorada
- Mejoras en almacenamiento y conversión a PDF

La Federación de Contenidos permite a los usuarios utilizar las capacidades adicionales sobre contenidos externos


IBM FileNet P8 Platform
Enterprise Records
P8 Based Solutions
...
Business Process Managemen
Content Federation and Integra
FileNet P8 Content Manager
FileNet Image Services
FileNet Content Services
OnDemand
Content Manager 8
Open Text
Documentum
Others via custom connectors
Disponibles actualmente

FileNet P8 proporciona una gestión de metadatos centralizada

ECM User Interfaces

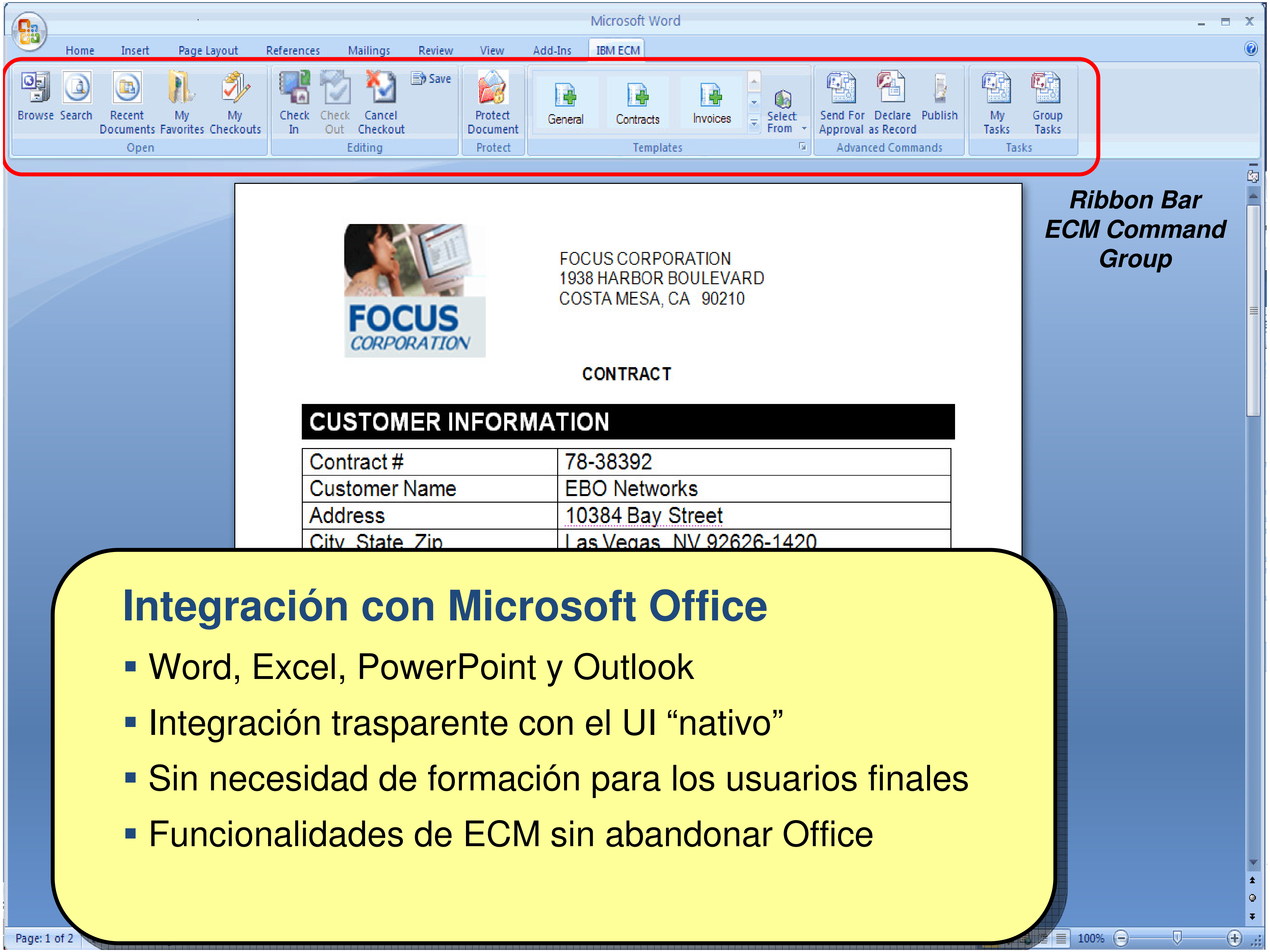

IBM
FileNet Workplace XT
Logged in as: suser
Tools
Preferences | Help | Log out
Actions
Drag files here to add
Favorites
ECM Store - Finance
ECM Store - Contracts
All Searches
Checkout List
Contract Templates
Customers
Change Notices
Contracts
Invoices
Project Requirements
Working
Templates
View
Download...
Check Out...
Cancel Check Out...
Add to Favorites...
Send Mail
Launch...
Properties
More Information
More Actions

	Name ▲	Size	Modified By	Modified On	Major Version
✓	Atlanta TEC Lease Agreement	68 KB	Tester	8/25/08 12:36 PM	1
	EBO Networks Contracts	68 KB	suser	8/22/08 5:38 PM	1
	JK Enterprises Contract	68 KB	suser	8/22/08 5:39 PM	1
	Project Blue Addendum	68 KB	suser	8/22/08 5:39 PM	1
	VoIP Expans	68 KB	suser	8/22/08 5:40 PM	1

Workplace XT 1.1.4
Interface de uso Intuitivo

- Vistas en árbol y lista “tipo” Explorer
- Doble click para abrir
- Menú flotante
- Toolbar
- Selección múltiple
- Drag and drop
- Envío por mail
- …

Sin necesidad de formación


Microsoft Word
Home
Insert
Page Layout
References
Mailings
Review
View
Add-Ins
IBM ECM
Browse
Search
Recent Documents
My Favorites
My Checkouts
Open
Check In
Check Out
Cancel Checkout
Save
Editing
Protect Document
Protect
General
Contracts
Invoices
Select From
Templates
Send For Approval
Declare as Record
Publish
Advanced Commands
My Tasks
Group Tasks
Tasks
Page: 1 of 2
100%

Ribbon Bar ECM Command Group

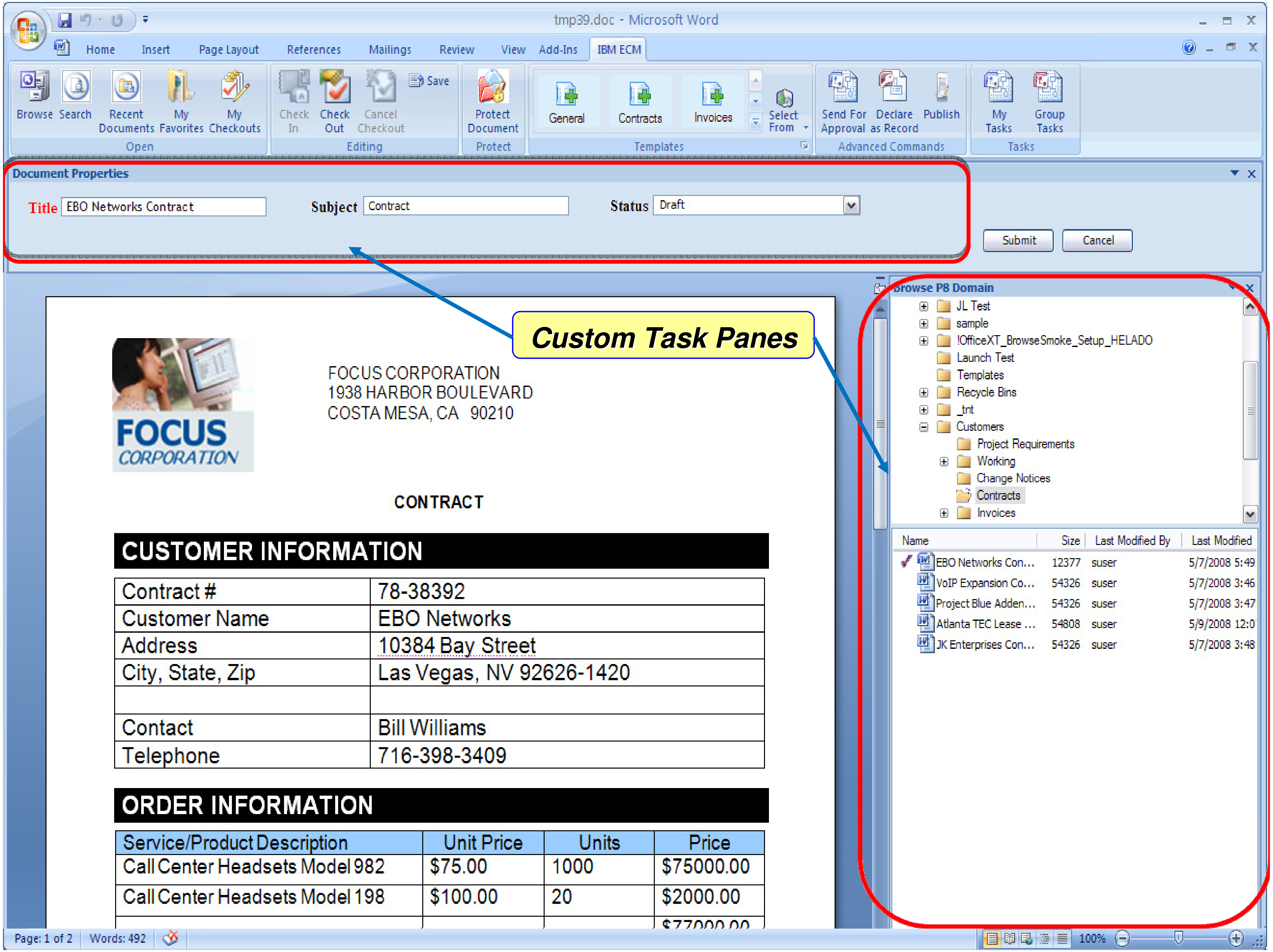
FOCUS CORPORATION
1938 HARBOR BOULEVARD
COSTA MESA, CA 90210

CONTRACT

CUSTOMER INFORMATION	
Contract #	78-38392
Customer Name	EBO Networks
Address	10384 Bay Street
City, State, Zip	Las Vegas, NV 92626-1420

Integración con Microsoft Office

- Word, Excel, PowerPoint y Outlook
- Integración trasparente con el UI “nativo”
- Sin necesidad de formación para los usuarios finales
- Funcionalidades de ECM sin abandonar Office


tmp39.doc - Microsoft Word
Home
Insert
Page Layout
References
Mailings
Review
View
Add-Ins
IBM ECM
Browse
Search
Recent Documents
My Favorites
My Checkouts
Open
Check In
Check Out
Cancel Checkout
Save
Editing
Protect Document
Protect
General
Contracts
Invoices
Select From
Templates
Send For Approval
Declare as Record
Publish
Advanced Commands
My Tasks
Group Tasks
Tasks
Submit
Cancel
Custom Task Panes
Browse P8 Domain
JL Test
sample
!OfficeXT_BrowseSmoke_Setup_HELADO
Launch Test
Templates
Recycle Bins
_tnt
Customers
Project Requirements
Working
Change Notices
Contracts
Invoices
Page: 1 of 2
Words: 492
100%

Document Properties

Title: EBO Networks Contract
Subject: Contract
Status: Draft

FOCUS CORPORATION
1938 HARBOR BOULEVARD
COSTA MESA, CA 90210

CONTRACT

CUSTOMER INFORMATION

Contract #	78-38392
Customer Name	EBO Networks
Address	10384 Bay Street
City, State, Zip	Las Vegas, NV 92626-1420
Contact	Bill Williams
Telephone	716-398-3409

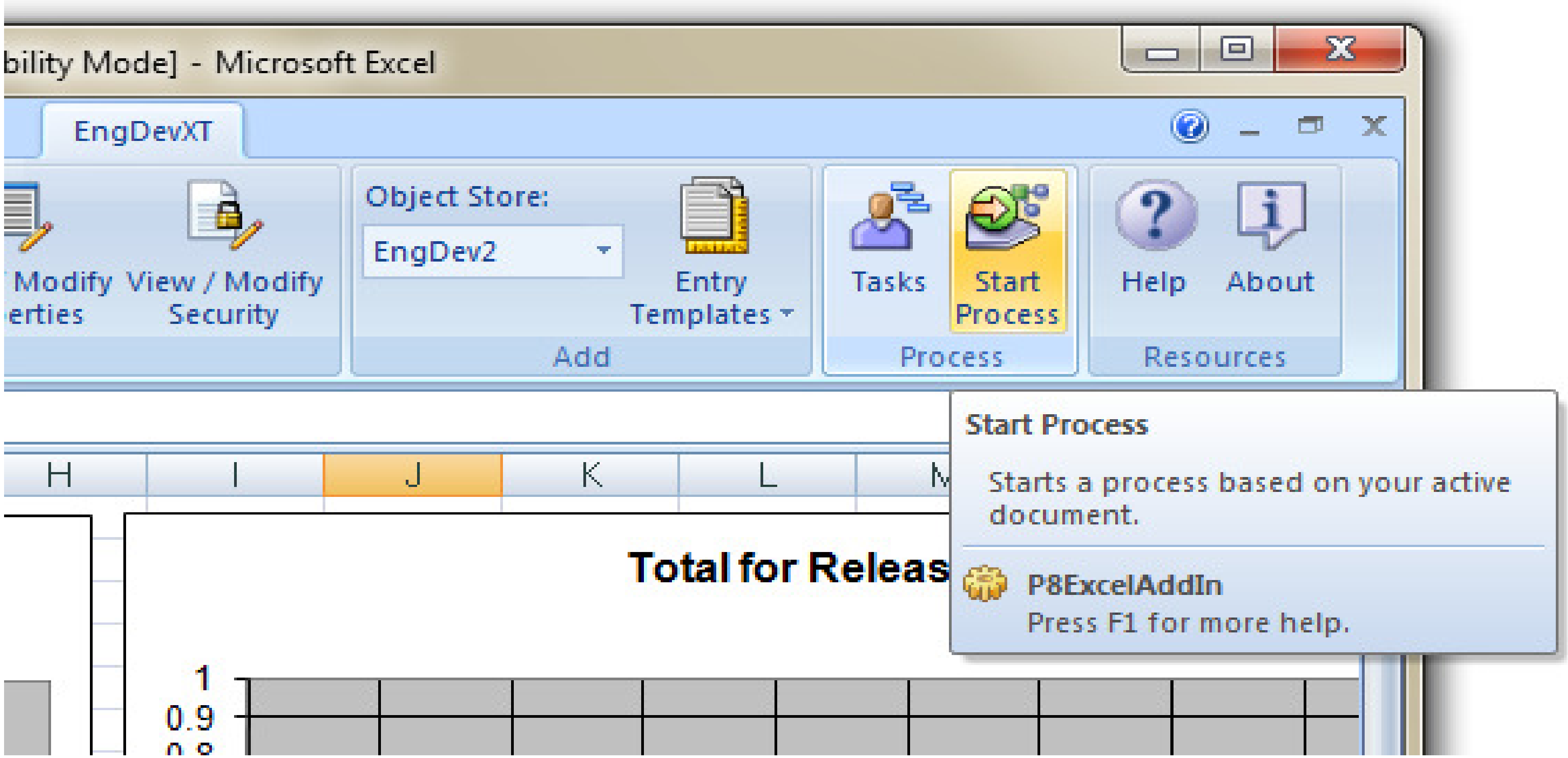
ORDER INFORMATION

Service/Product Description	Unit Price	Units	Price
Call Center Headsets Model 982	$75.00	1000	$75000.00
Call Center Headsets Model 198	$100.00	20	$2000.00
			$77000.00

Name	Size	Last Modified By	Last Modified
✓ EBO Networks Con...	12377	suser	5/7/2008 5:49
VoIP Expansion Co...	54326	suser	5/7/2008 3:46
Project Blue Adden...	54326	suser	5/7/2008 3:47
Atlanta TEC Lease ...	54808	suser	5/9/2008 12:0
JK Enterprises Con...	54326	suser	5/7/2008 3:48

Integración con Microsoft Office 1.1.5 (Mar 2010)

- Los usuarios pueden iniciar un proceso de aprobación desde un documento abierto en Office
- Dicho documento se convierte en un attachment del proceso


bility Mode] - Microsoft Excel
EngDevXT
Modify
erties
View / Modify
Security
Object Store:
EngDev2
Entry
Templates
Add
Tasks
Start
Process
Process
Help
About
Resources
H
I
J
K
L
M
Total for Releas
1
0.9

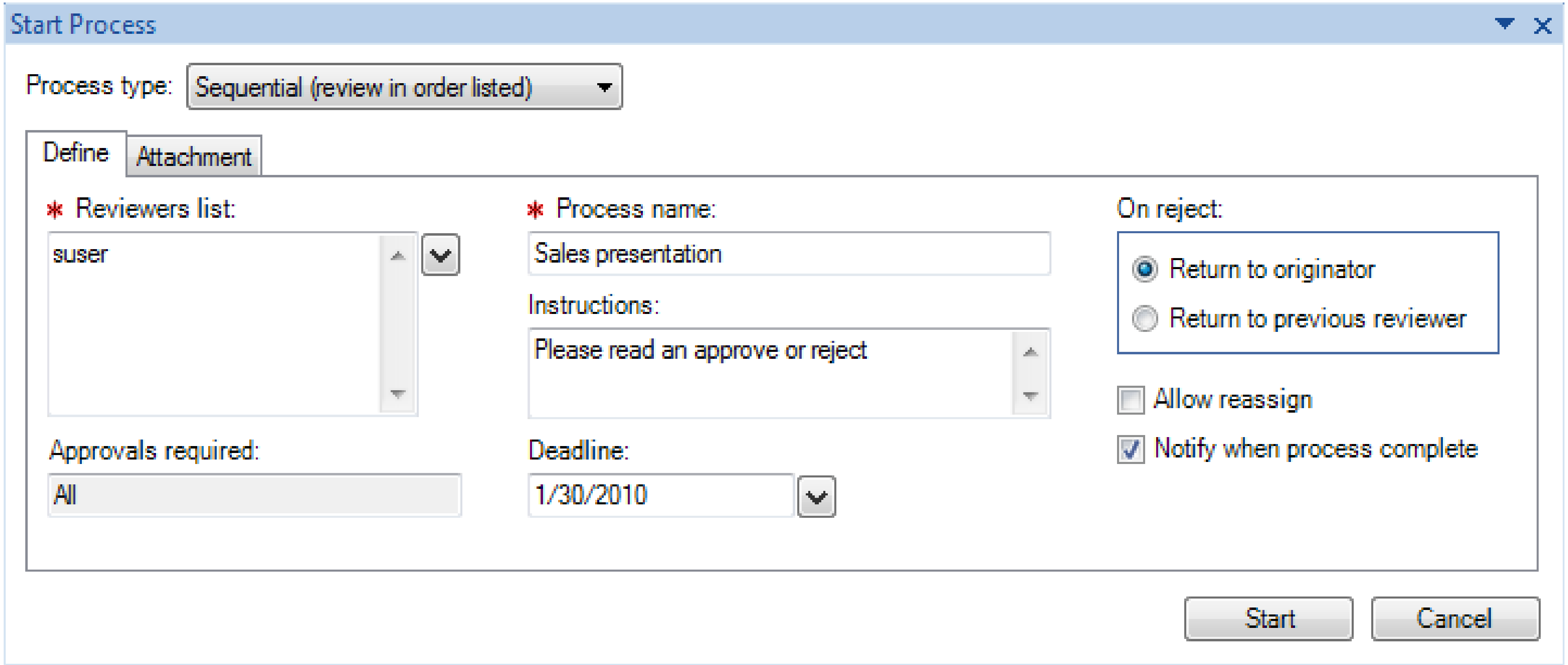
Start Process

Starts a process based on your active document.

P8ExcelAddIn
Press F1 for more help.

Integración con Microsoft Office 1.1.5

- Proceso de revisión secuencial ó en paralelo



Start Process

Process type: Sequential (review in order listed)

* Reviewers list: suser

* Process name: Sales presentation

Instructions: Please read an approve or reject

On reject:

● Return to originator

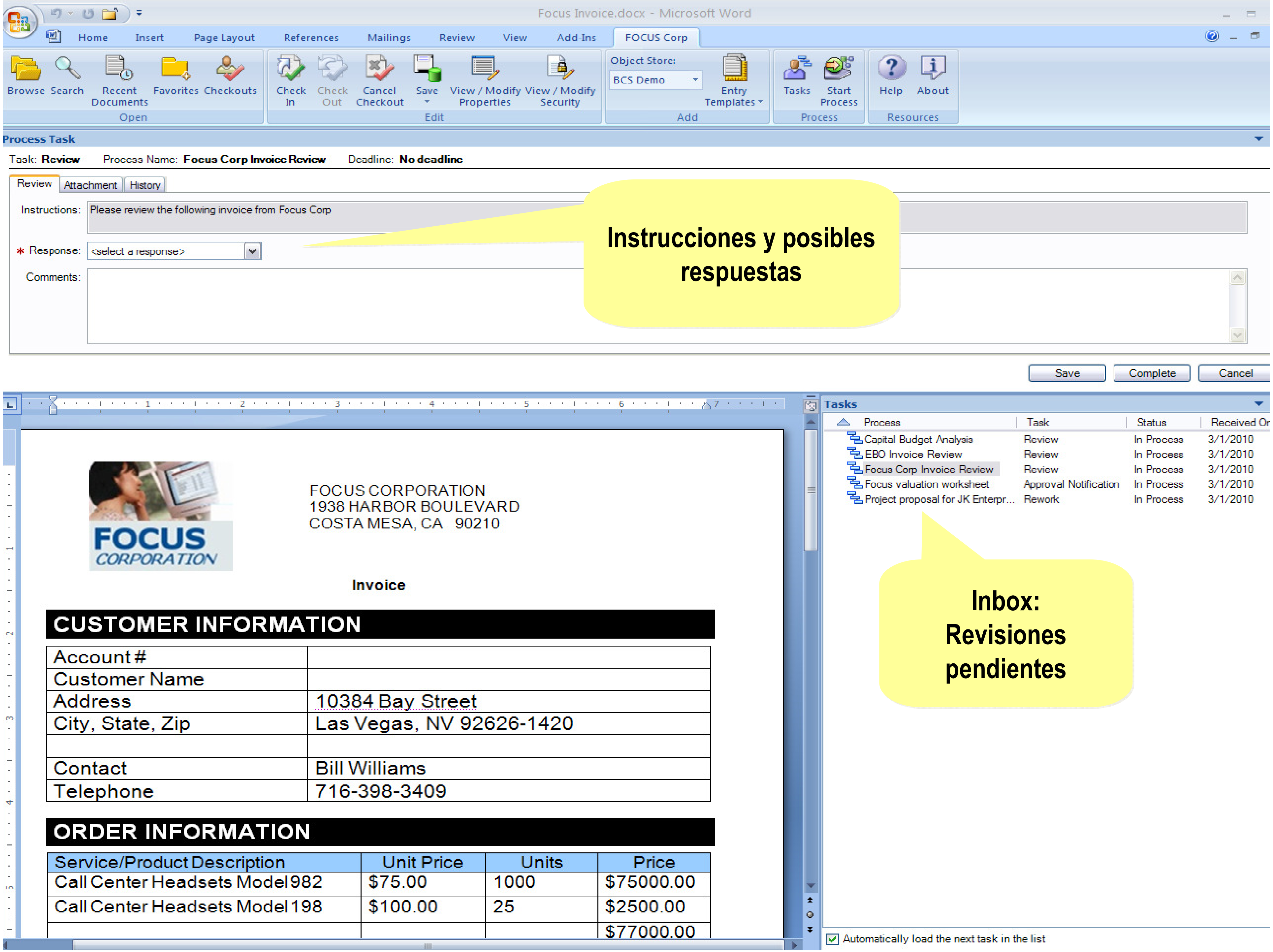
○ Return to previous reviewer

☐ Allow reassign

☑ Notify when process complete

Approvals required: All

Deadline: 1/30/2010


Focus Invoice.docx - Microsoft Word
Home
Insert
Page Layout
References
Mailings
Review
View
Add-Ins
FOCUS Corp
Browse
Search
Recent Documents
Favorites
Checkouts
Open
Check In
Check Out
Cancel Checkout
Save
View / Modify Properties
View / Modify Security
Edit
Object Store:
BCS Demo
Entry Templates
Add
Tasks
Start Process
Process
Help
About
Resources
Process Task
Review
Attachment
History
Save
Complete
Cancel
Tasks

Task: **Review** Process Name: **Focus Corp Invoice Review** Deadline: **No deadline**

Instructions: Please review the following invoice from Focus Corp

* Response: <select a response>

Comments:

Instrucciones y posibles respuestas

FOCUS CORPORATION
1938 HARBOR BOULEVARD
COSTA MESA, CA 90210

Invoice

CUSTOMER INFORMATION

Account #	
Customer Name	
Address	10384 Bay Street
City, State, Zip	Las Vegas, NV 92626-1420
Contact	Bill Williams
Telephone	716-398-3409

ORDER INFORMATION

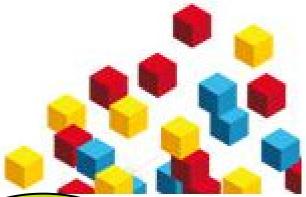
Service/Product Description	Unit Price	Units	Price
Call Center Headsets Model 982	$75.00	1000	$75000.00
Call Center Headsets Model 198	$100.00	25	$2500.00
			$77000.00

Process	Task	Status	Received On
Capital Budget Analysis	Review	In Process	3/1/2010
EBO Invoice Review	Review	In Process	3/1/2010
Focus Corp Invoice Review	Review	In Process	3/1/2010
Focus valuation worksheet	Approval Notification	In Process	3/1/2010
Project proposal for JK Enterpr...	Rework	In Process	3/1/2010

☑ Automatically load the next task in the list

Inbox: Revisiones pendientes

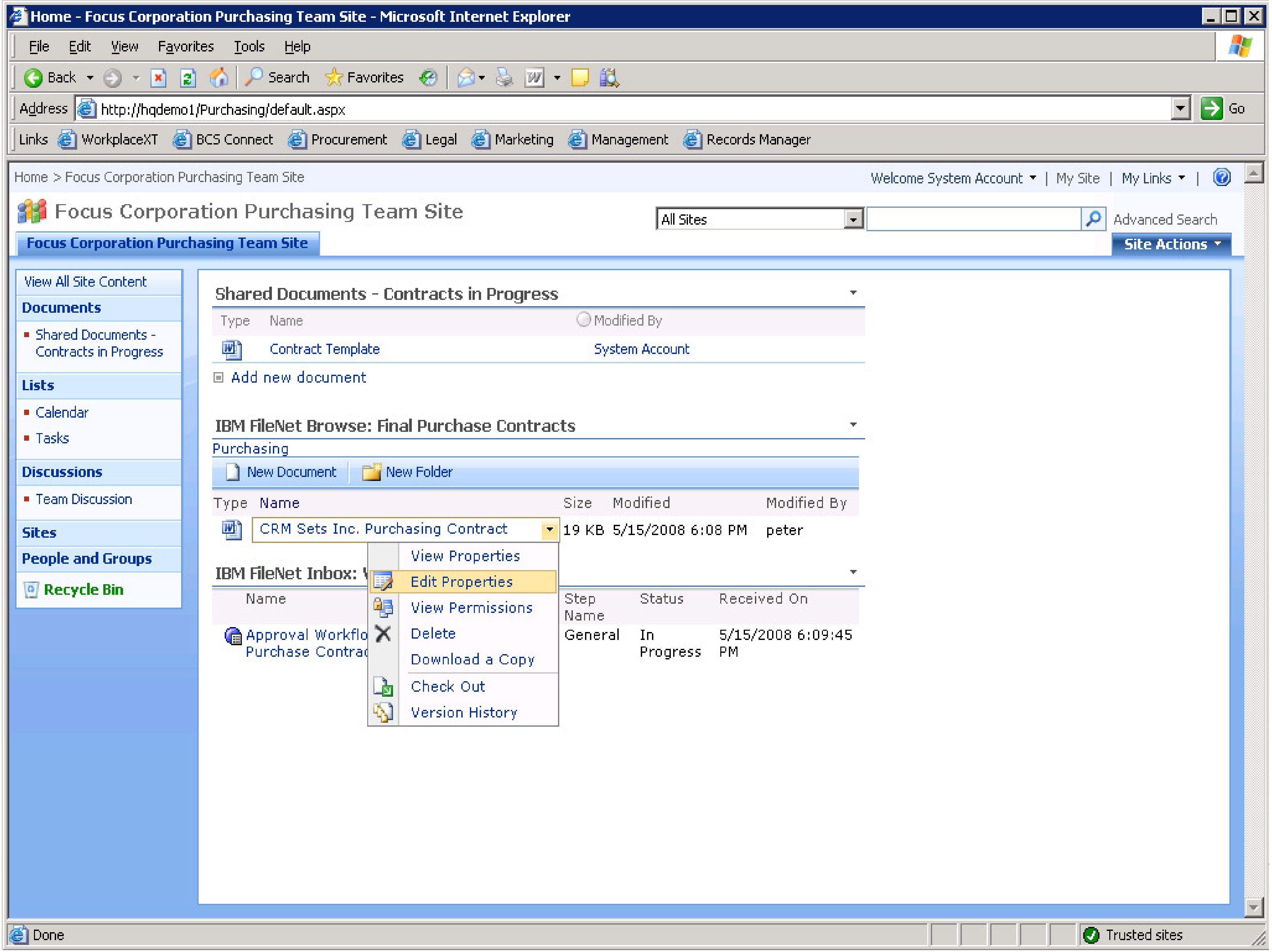
WebParts para SharePoint Portal



Componentes de interface de P8 para SharePoint

Web Parts

- Añadir/Borrar documentos
- Check-in, Checkout
- Navegar/Buscar
- Propiedades
- Inbox
- Colas Públicas de BPM
- Lanzamiento de Procesos de P8 BPM
- Búsquedas almacenadas
- Cambio de orden y filtrado de columnas
- Plantillas de búsqueda


Home - Focus Corporation Purchasing Team Site - Microsoft Internet Explorer
File
Edit
View
Favorites
Tools
Help
Back
Search
Favorites
Address
http://hqdemo1/Purchasing/default.aspx
Go
Links
WorkplaceXT
BCS Connect
Procurement
Legal
Marketing
Management
Records Manager
Home > Focus Corporation Purchasing Team Site
Welcome System Account
My Site
My Links
Focus Corporation Purchasing Team Site
All Sites
Advanced Search
Focus Corporation Purchasing Team Site
Site Actions
View All Site Content
Documents
Shared Documents - Contracts in Progress
Lists
Calendar
Tasks
Discussions
Team Discussion
Sites
People and Groups
Recycle Bin
Add new document
Purchasing
New Document
New Folder
View Properties
Edit Properties
View Permissions
Delete
Download a Copy
Check Out
Version History
Done
Trusted sites

Shared Documents - Contracts in Progress

Type	Name	Modified By
W	Contract Template	System Account

IBM FileNet Browse: Final Purchase Contracts

Type	Name	Size	Modified	Modified By
W	CRM Sets Inc. Purchasing Contract	19 KB	5/15/2008 6:08 PM	peter

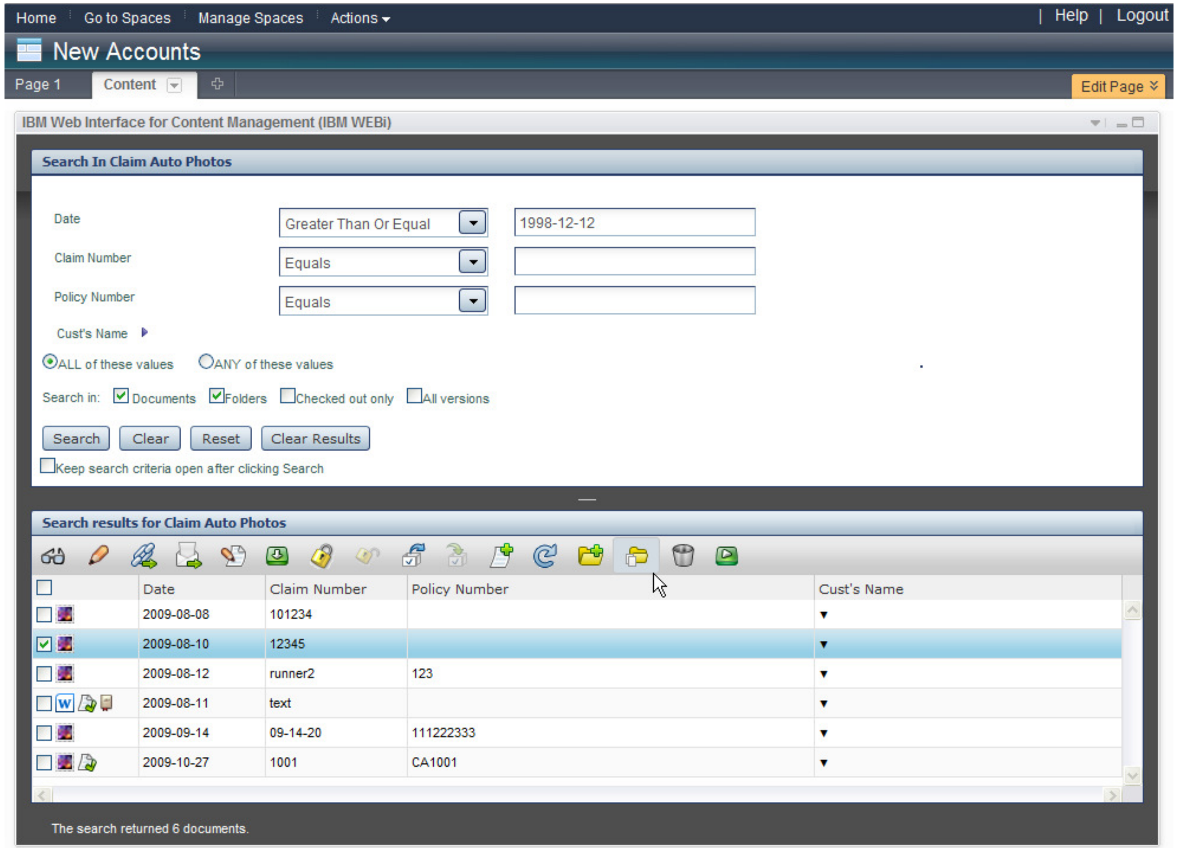
IBM FileNet Inbox: \

Name	Step Name	Status	Received On
Approval Workflo Purchase Contrac	General	In Progress	5/15/2008 6:09:45 PM

WEBi 1.0.4 – Liberado en Mar 2010

- Posibilidad de invocación de WEBi desde aplicaciones a medida:
    - Búsqueda
    - Visualización de documentos
    - Acciones sobre documentos, como check-in, check-out, etc.

- Single sign-on con SPENEGO/Kerberos


Home
Go to Spaces
Manage Spaces
Actions
Help
Logout
New Accounts
Page 1
Content
Edit Page
IBM Web Interface for Content Management (IBM WEBi)
Search In Claim Auto Photos

Date	Greater Than Or Equal	1998-12-12
Claim Number	Equals	
Policy Number	Equals	
Cust's Name		

● ALL of these values ○ ANY of these values

Search in: ☑ Documents ☑ Folders ☐ Checked out only ☐ All versions

Search
Clear
Reset
Clear Results

☐ Keep search criteria open after clicking Search

Search results for Claim Auto Photos

☐	Date	Claim Number	Policy Number	Cust's Name
☐	2009-08-08	101234		▾
☑	2009-08-10	12345		▾
☐	2009-08-12	runner2	123	▾
☐	2009-08-11	text		▾
☐	2009-09-14	09-14-20	111222333	▾
☐	2009-10-27	1001	CA1001	▾

The search returned 6 documents.

Content Management Interoperability Services (CMIS)

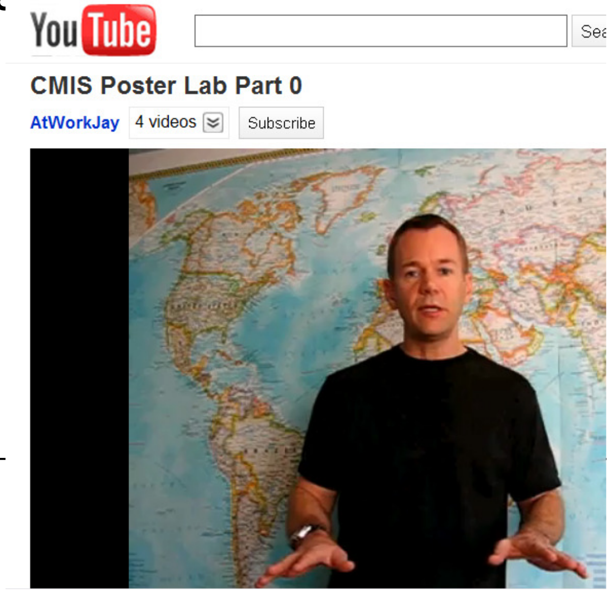
¡OASIS acaba de aprobar CMIS 1.0!

- Estándar para Gestión Documental
- Expande el mercado de ECM ISV: más posibilidades para escribir aplicaciones
  - IBM Partners con aplicaciones CMIS: WeWebU, Genus, ISIS Papyrus, Zia
- Protege la inversión en ECM mediante repositorios abiertos

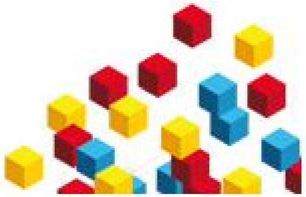
CMIS @ IBM

http://www-01.ibm.com/software/data/content-management/cm-interoperablity-services.html

- CMIS Tech Preview disponible en
- devloperWorks
- Véase también a Jay Brown (IBM) en YouTube
  - http://www.youtube.com/user/AtWorkJay

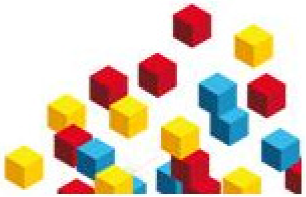


CMIS Poster Lab Part 0



Business Process Management

P8 BPM 4.5.1



Business User

Business Analyst

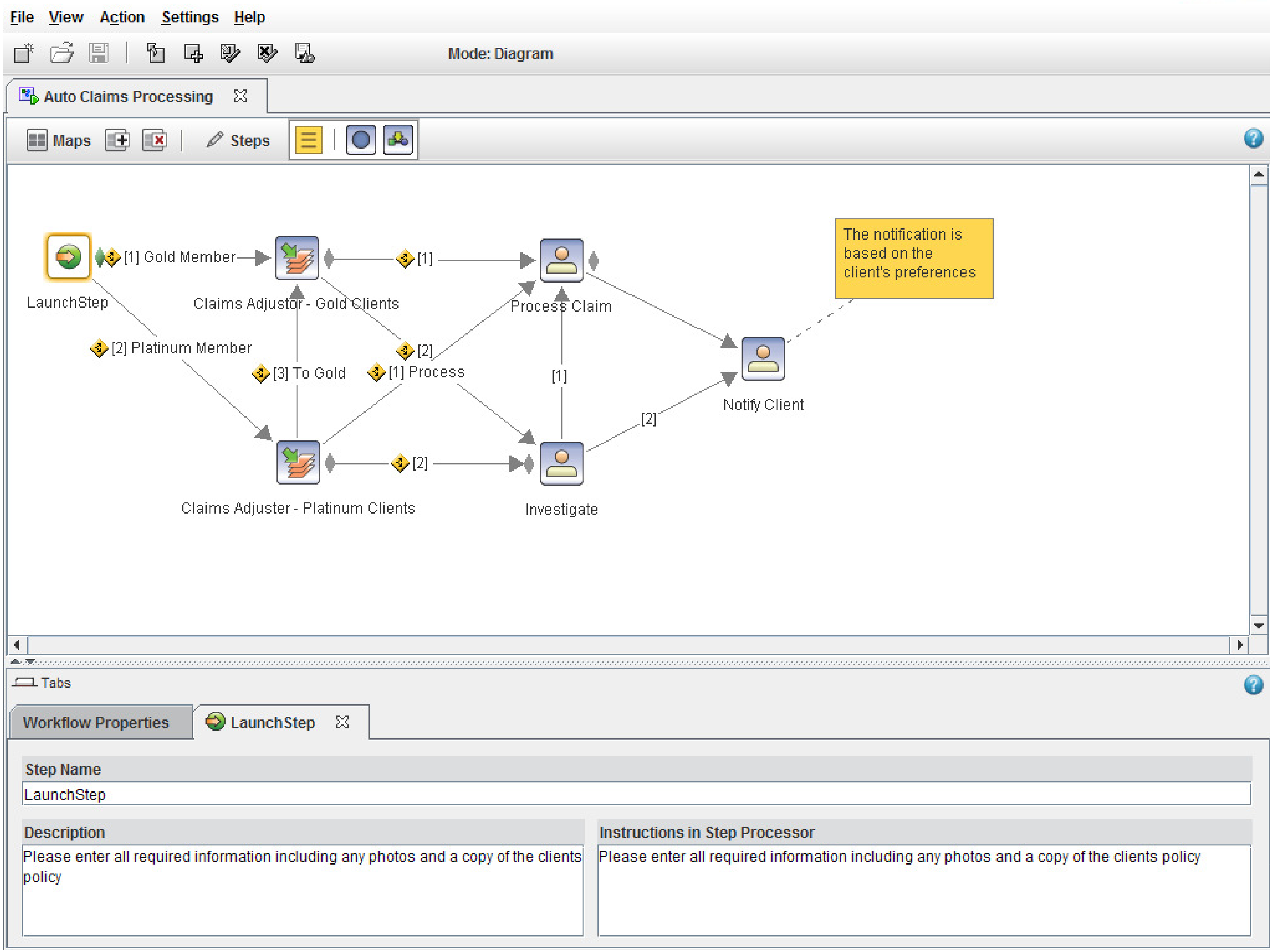
IT Developer

Permite…

- Una mejor colaboración entre los usuarios de negocio y el departamento de IT
- Reducción en el tiempo de desarrollo de aplicaciones
- Interfaces de Usuario actuales y fáciles de utilizar

Mediante …

- Herramientas de diseño de procesos simplificadas
- Widgets: componentes de UI web 2.0
- Un Mash-up framework para construir soluciones finales


File
View
Action
Settings
Help
Mode: Diagram
Auto Claims Processing
Maps
Steps
LaunchStep
[1] Gold Member
Claims Adjustor - Gold Clients
[1]
Process Claim
[2] Platinum Member
[3] To Gold
[2]
[1] Process
[1]
Notify Client
[2]
[2]
Claims Adjuster - Platinum Clients
Investigate
Tabs
Workflow Properties
LaunchStep

The notification is based on the client's preferences

Step Name

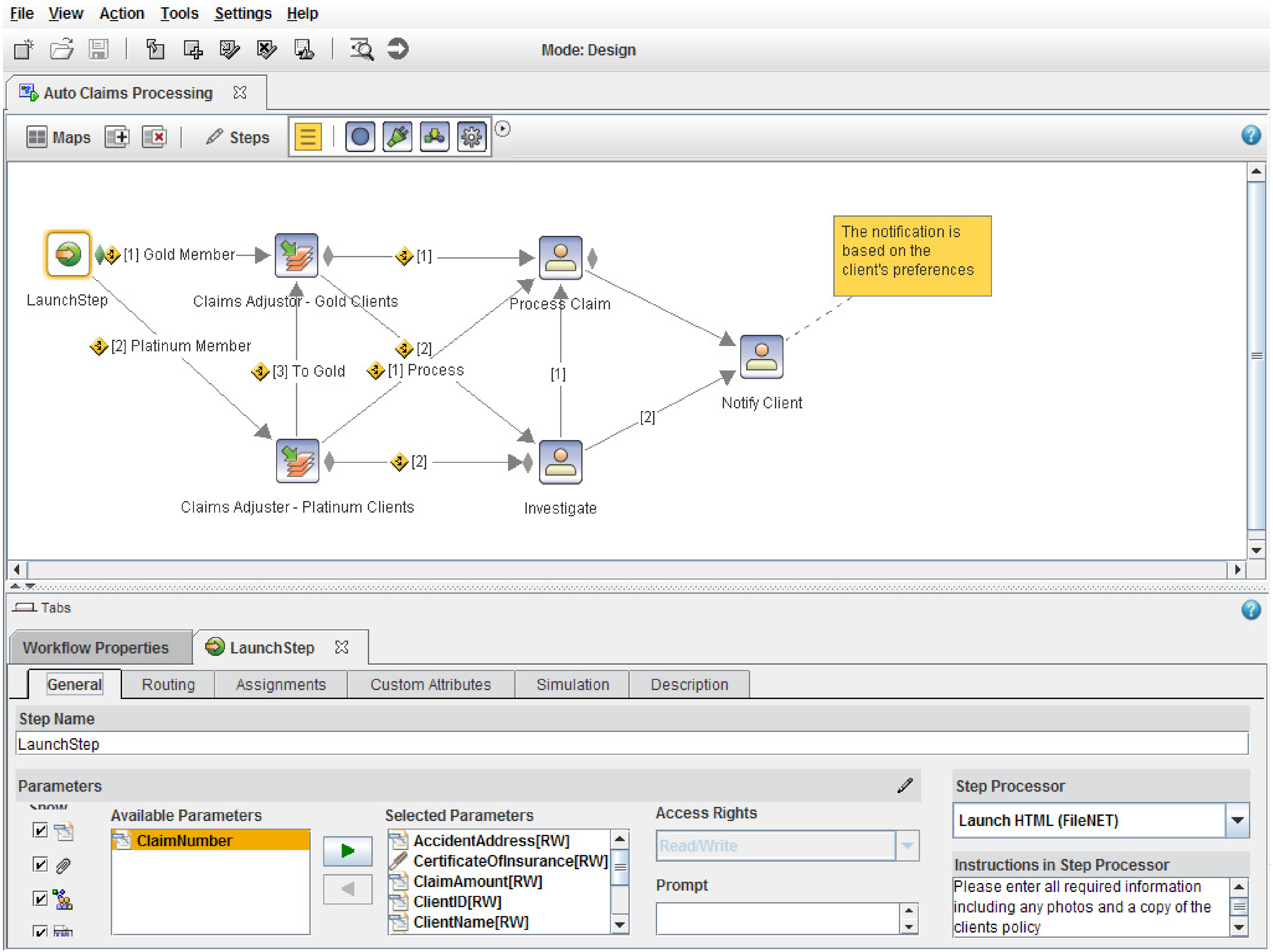
LaunchStep

Description

Please enter all required information including any photos and a copy of the clients policy

Instructions in Step Processor

Please enter all required information including any photos and a copy of the clients policy


File
View
Action
Tools
Settings
Help
Auto Claims Processing
Maps
Steps
LaunchStep
[1] Gold Member
[2] Platinum Member
Claims Adjustor - Gold Clients
[1]
[2]
[3] To Gold
[1] Process
Process Claim
[1]
Notify Client
[2]
Claims Adjuster - Platinum Clients
[2]
Investigate
Tabs
Workflow Properties
LaunchStep
General
Routing
Assignments
Custom Attributes
Simulation
Description
Show

Mode: Design

The notification is based on the client's preferences

Step Name

LaunchStep

Parameters

Available Parameters:
ClaimNumber

Selected Parameters:
AccidentAddress[RW]
CertificateOfInsurance[RW]
ClaimAmount[RW]
ClientID[RW]
ClientName[RW]

Access Rights: Read/Write

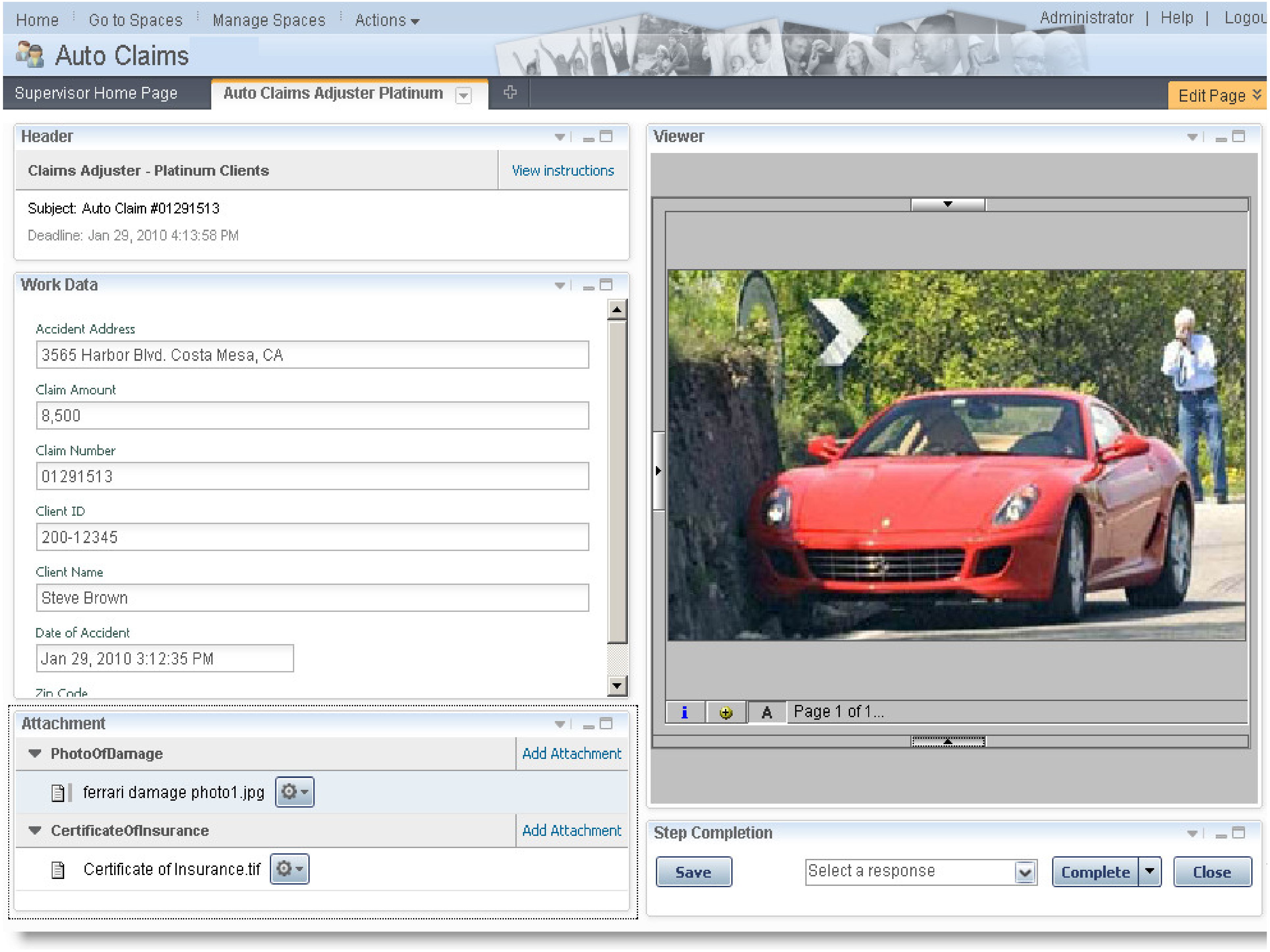
Prompt:

Step Processor

Launch HTML (FileNET)

Instructions in Step Processor

Please enter all required information including any photos and a copy of the clients policy


Home
Go to Spaces
Manage Spaces
Actions
Administrator | Help | Logou
Auto Claims
Supervisor Home Page
Auto Claims Adjuster Platinum
Edit Page
Header
Viewer
Work Data
Attachment
Step Completion
Page 1 of 1...
Save
Select a response
Complete
Close

Claims Adjuster - Platinum Clients

View instructions

Subject: Auto Claim #01291513

Deadline: Jan 29, 2010 4:13:58 PM

Accident Address: 3565 Harbor Blvd. Costa Mesa, CA

Claim Amount: 8,500

Claim Number: 01291513

Client ID: 200-12345

Client Name: Steve Brown

Date of Accident: Jan 29, 2010 3:12:35 PM

Zip Code

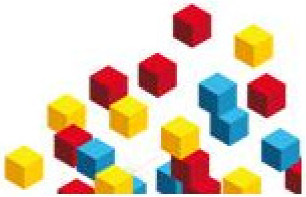
PhotoOfDamage Add Attachment

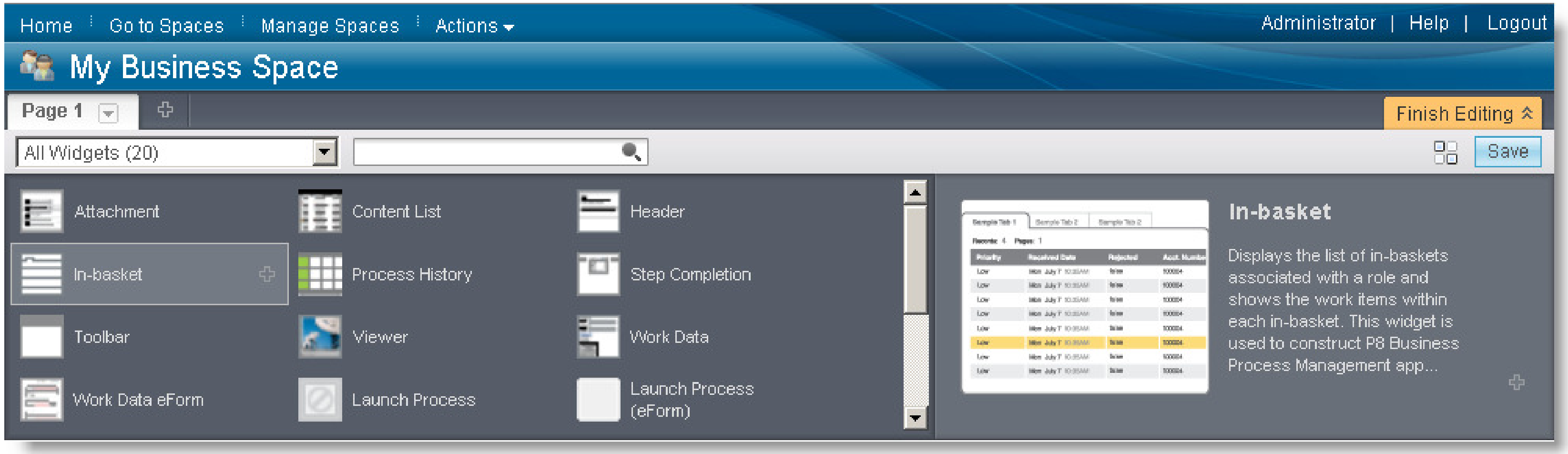
ferrari damage photo1.jpg

CertificateOfInsurance Add Attachment

Certificate of Insurance.tif

IBM ECM Widgets




Home
Go to Spaces
Manage Spaces
Actions
Administrator | Help | Logout
My Business Space
Page 1
Finish Editing
All Widgets (20)
Save
Attachment
Content List
Header
In-basket
Process History
Step Completion
Toolbar
Viewer
Work Data
Work Data eForm
Launch Process
Launch Process (eForm)

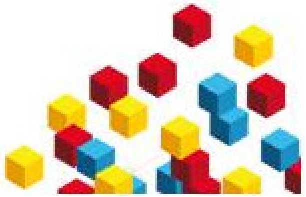
In-basket

Displays the list of in-baskets associated with a role and shows the work items within each in-basket. This widget is used to construct P8 Business Process Management app...

- **Home Page Widgets**
  - ECM Toolbar
  - ECM In-basket
  - ECM Process History
  - ECM WEBi
- **Helper Widgets**
  - ECM Launch Process
  - ECM Launch Process (eForm)
  - ECM Display Web Page
- **Step Processor Widgets**
  - ECM Header
  - ECM Work Data
  - ECM Work Data eForm
  - ECM Attachment
  - ECM Step Completion
  - ECM Viewer
  - ECM Content List
- **Utility Widgets**
  - Data Viewer
  - Web Site
  - Web Feed
  - Script Adapter

ECM Widgets 4.5.2 – Liberado Mar 2010

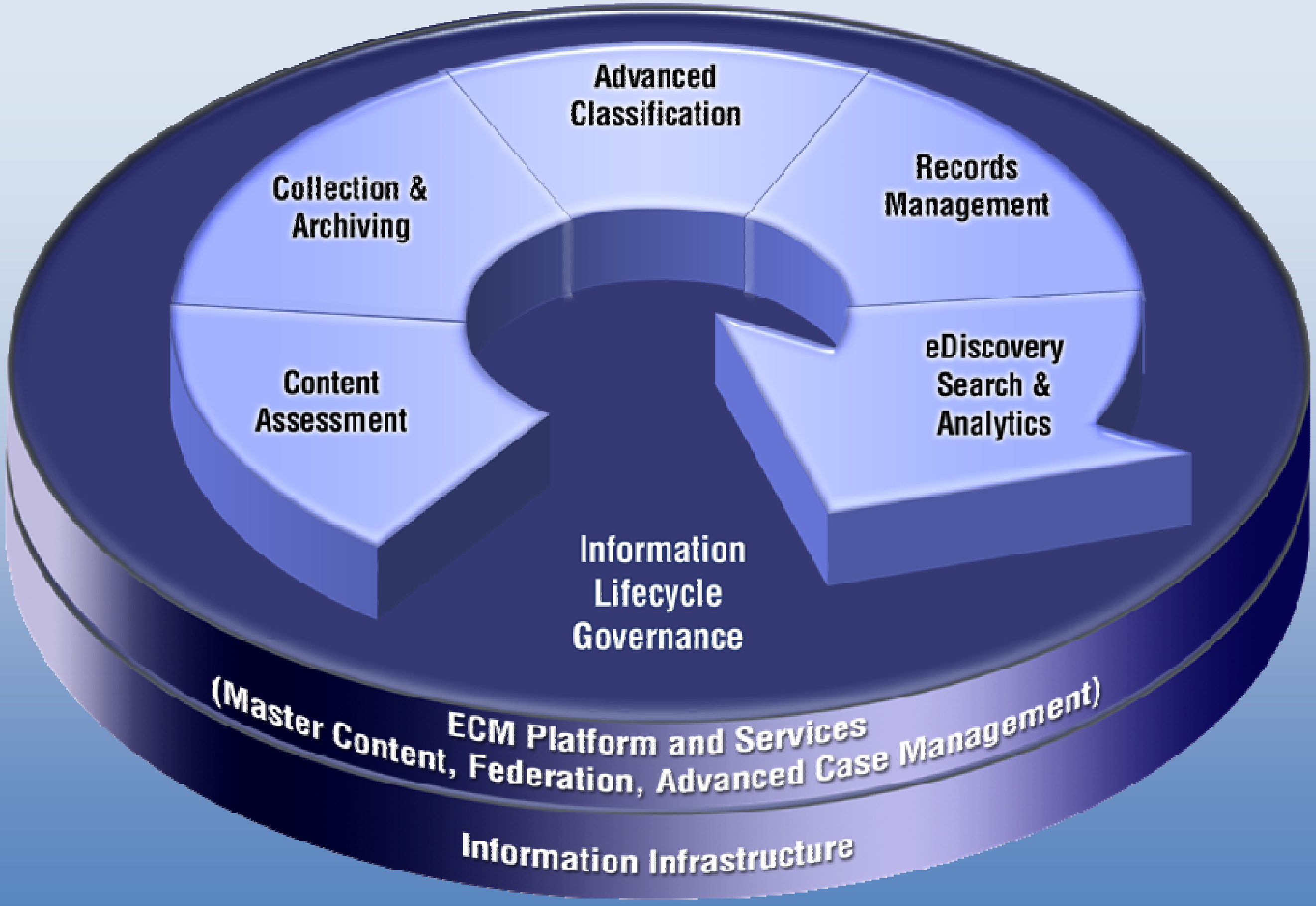
- Attachments de Content Manager v8 con visualización
- WEBi Widget
- Process History Widget
- Nuevas capacidades de personalización
  - Próximo Work Item
  - Solicitud de Work Data
- Mejoras en la conexión de Widgets
- AIX y WAS 7
- Soporte de Oracle DB (para Business Space)



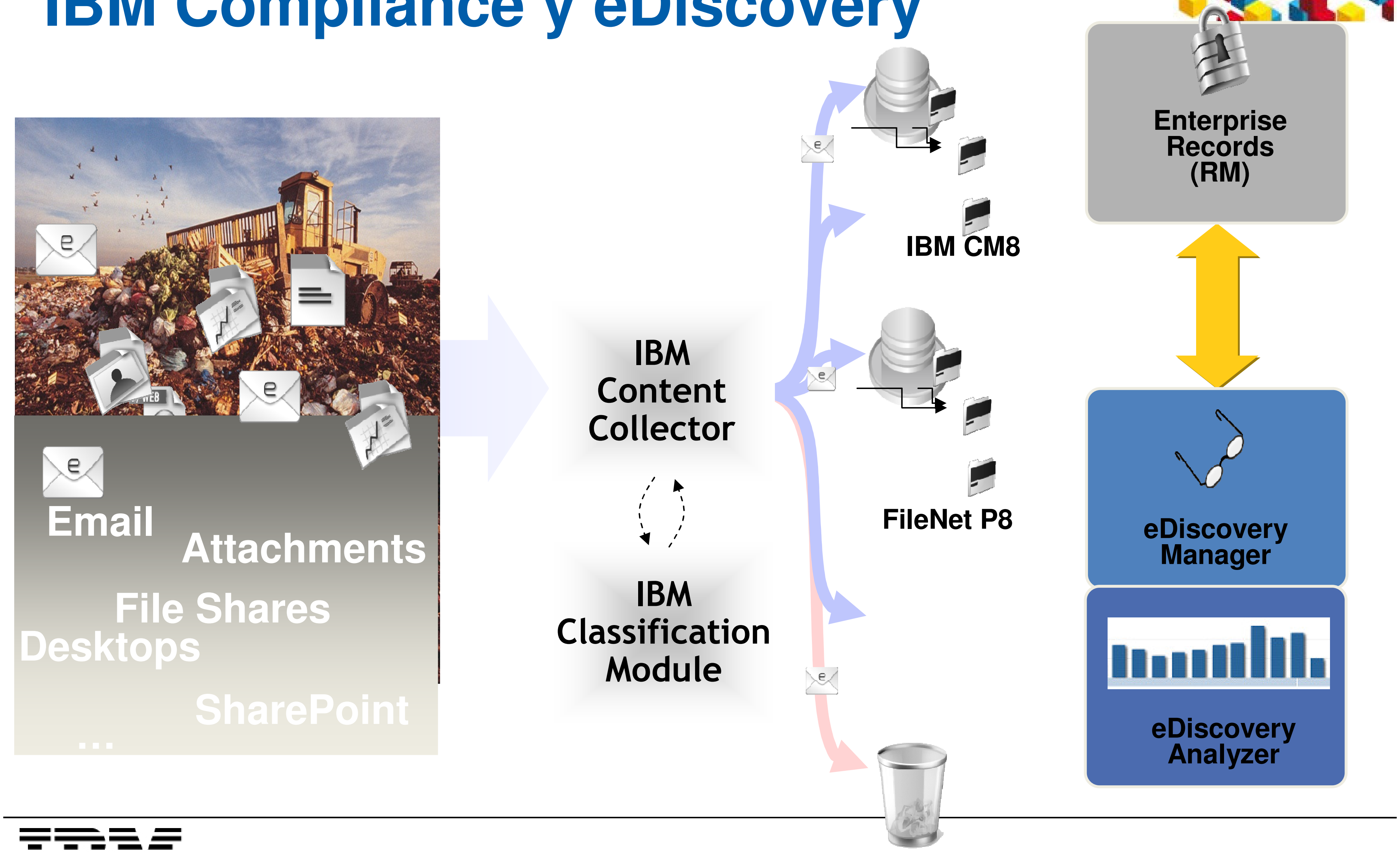
ECM Compliance y eDiscovery

- Content Collection
- Classification
- Enterprise Records
- eDiscovery
- Content Analytics

IBM Information Lifecycle Governance Model


Advanced Classification
Records Management
Collection & Archiving
eDiscovery Search & Analytics
Content Assessment
Information Lifecycle Governance
ECM Platform and Services
(Master Content, Federation, Advanced Case Management)
Information Infrastructure

IBM Compliance y eDiscovery



Email

Attachments

File Shares

Desktops

SharePoint

...

IBM Content Collector

IBM Classification Module

IBM CM8

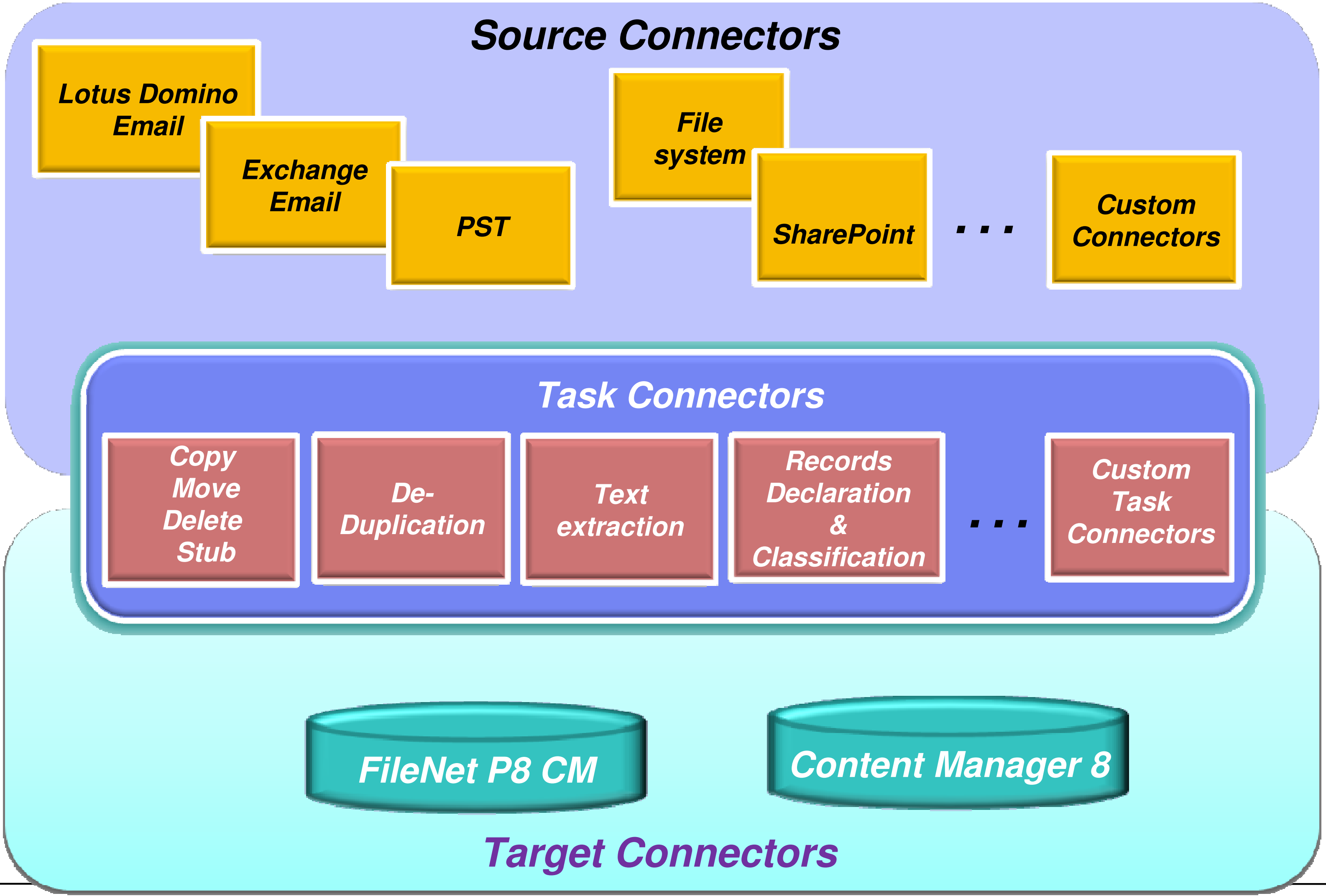
FileNet P8

Enterprise Records (RM)

eDiscovery Manager

eDiscovery Analyzer

IBM Content Collector 2.1 – 4Q 2009



Source Connectors

Lotus Domino Email

Exchange Email

PST

File system

SharePoint

. . .

Custom Connectors

Task Connectors

Copy
Move
Delete
Stub

De-Duplication

Text extraction

Records Declaration & Classification

. . .

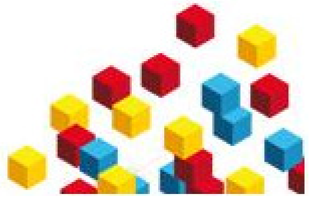
Custom Task Connectors

FileNet P8 CM

Content Manager 8

Target Connectors

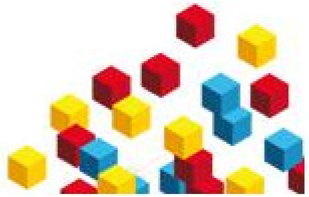
ECM e Integración con SharePoint



- IBM ECM como **repositorio empresarial y robusto** tras portales SharePoint departamentales
- Para IBM Content Manager y FileNet P8 CM
- Mueve/copia/sustituye documentos por enlaces
- Permite el archivado, gestión de retención de documentos, procesos de negocio, búsqueda…
- “Barrido” de contenido de sitios SharePoint previos
- Auto descubrimiento de sitios SharePoint nuevos
- Single sign-on

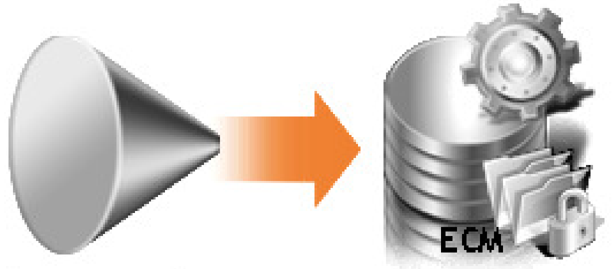
IBM Content
Analytics 2.1
Dec 2009

New!



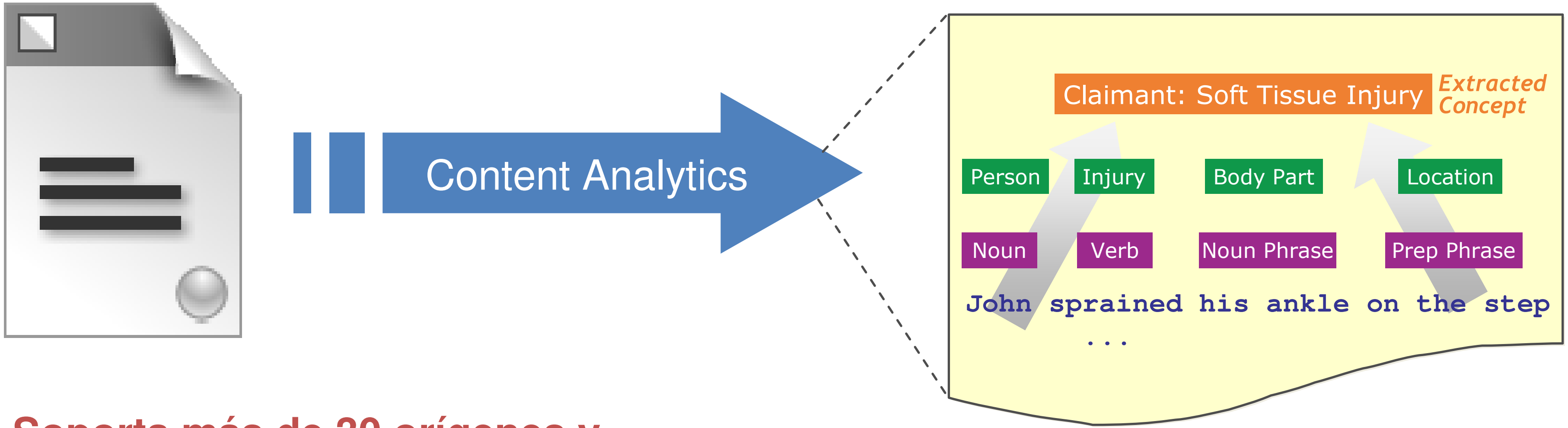
Plataforma para análisis y valoración de contenidos

- Extraer información y visibilidad a partir de los **contenidos y su contexto**
- Exponer tendencias, patrones, y correlaciones entre la información de negocio
  - Llamadas a centros de soporte, siniestros, registros sanitarios, informes policiales, documentación técnica…
- Valoración de los Contenidos



Content Assessment Decisions
Value-based Collection, Cleanup,
Decommissioning, & Governance

Drawing Business Insight From Content



Content Analytics

Claimant: Soft Tissue Injury

Extracted Concept

Person

Injury

Body Part

Location

Noun

Verb

Noun Phrase

Prep Phrase

`John sprained his ankle on the step`

`...`

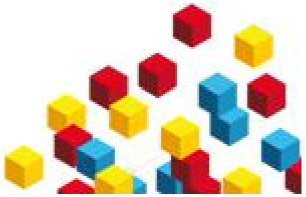
Documentos Analizados

Con conceptos identificados

Soporta más de 30 orígenes y 150 formatos de contenidos

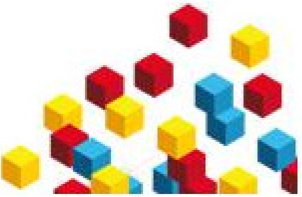
Basado en UIMA, arquitectura abierta para el análisis textual que se ha convertido en un estándar. Con sus orígenes en IBM, actualmente se trata de un estándar OASIS incluido en un proyecto open-source Apache

Business Intelligence



Gestión de Expedientes Avanzada

¿Qué es la Gestión de Expedientes?



- La Gestión de Expedientes hace referencia a la coordinación de servicios, por ejemplo legales, financieros, sanitarios, etc. que habitualmente incluyen la creación de un expediente y el seguimiento de un proceso para garantizar la prestación de los servicios. La información relacionada con el expediente es accesible al equipo que colabora en su resolución.
- Una vez que se cierra el expediente, la información se conserva durante un periodo de acuerdo a la legislación
- Estos procesos son muy dinámicos y colaborativos. Requieren una gestión de eventos y habitualmente tienen una duración larga en el tiempo.

Diferentes tipos de ‘Expedientes’

Facturas, contratos, empleados, vendedores, clientes, proyectos, quejas, excepciones, incidentes, auditorías, eDiscovery, etc.

SEGUROS

- Pólizas
- Suscripciones
- Partes
- Anualidades

BANCA

- Préstamo
- Reclamación
- Hipoteca
- Cuenta
- Tarjeta de Crédito
- Inversión

SANIDAD

- Historia Clínica
- Proveedor

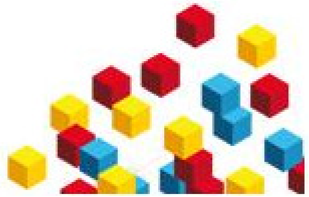
GOBIERNO

- Beneficios
- Subvención
- Trinunal
- Ciudadano
- Contribuyente

ENERGÍA

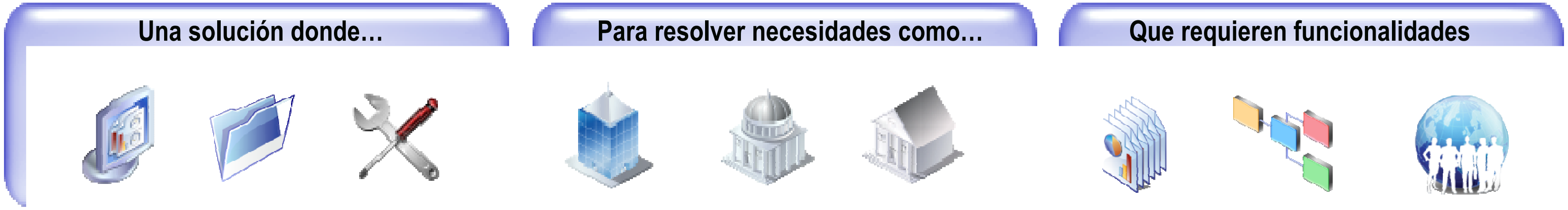
- Calificación
- Reclamación
- Licencia
- Finca
- Propiedad

Sin embargo, en todas las industrias
hay un conjunto de necesidades comunes



¿Qué es la Gestión de Expedientes?
¿Qué funcionalidades avanzadas se necesitan?

Uniendo procesos e información … en el contexto de un expediente



Una solución donde…

Para resolver necesidades como…

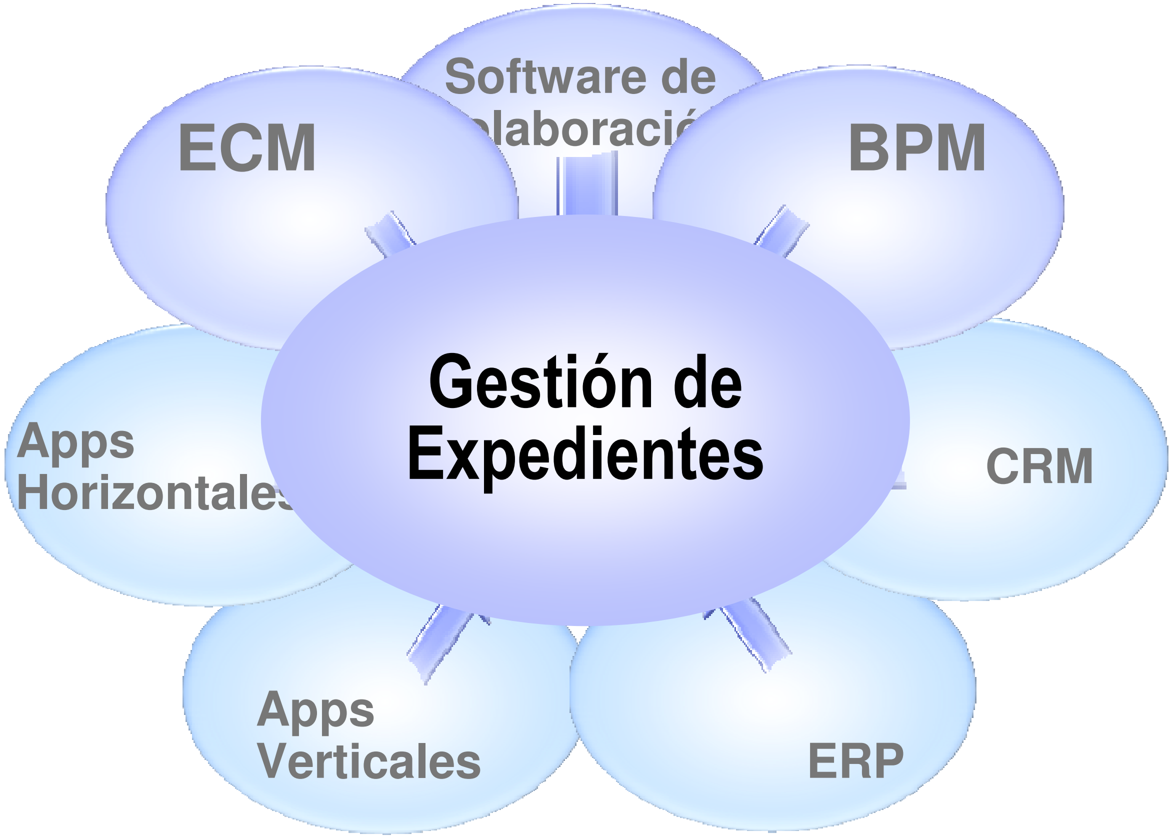
Que requieren funcionalidades

¡Gestionando mejor el tratamiento de Expedientes!

Los resultados se orientan a **los objetivos**
- Frecuentemente los procesos **no están predeterminados**

- Motores de Análisis

La Gestión de Expedientes desde una nueva perspectiva



Software de
laboració

ECM

BPM

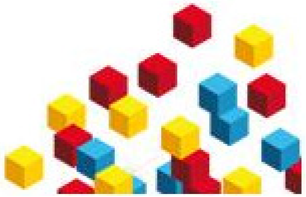
Gestión de
Expedientes

Apps
Horizontales

CRM

Apps
Verticales

ERP



Estrategia de IBM en el área de ACM

Advanced case management *es la estrategia de IBM para alinear las capacidades de* ***IBM Software Group*** *dando respuesta a las exigencias requeridas para un tratamiento mejorado de los expedientes*

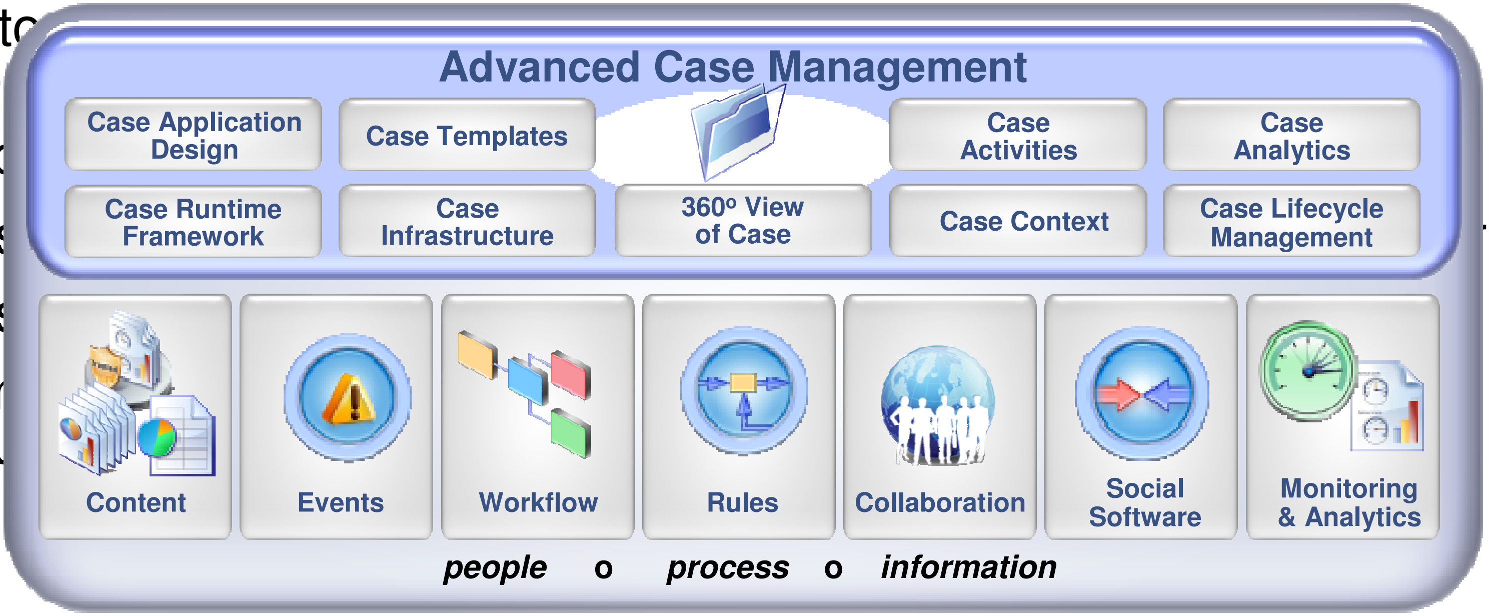
IBM dispone de amplia experiencia a ls hora de resolver las necesidades de negocio del tratamiento de expedientes mediante su solución de ***ECM y BPM****, a lo cual añade sus capacidades en la* ***gestión de reglas, eventos, colaboración, software social y de análisis,*** *dando como resultado el producto más completo del mercado para el tratamiento de expedientes.*

La estrategia de IBM

- ✓ *Centrarse en optimizar el tratamiento de expedientes*
- ✓ *Alinear las capacidades de SWG y de los Laboratorios sobre las necesidades de la gestión de expedientes*
- ✓ *Diseñar una solución de ACM fácil de utilizar, que integre la experiencia de los usuarios*
- ✓ *Generar plantillas reutilizables que permitan acelerar la puesta en explotación de soluciones finales*

Estrategia de IBM en el área de ACM

- Alinear contenidos, procesos y usuarios
- Construir una solución optimizada, combinando moto her y so
- Ges rada
- Ges
- Cor solu



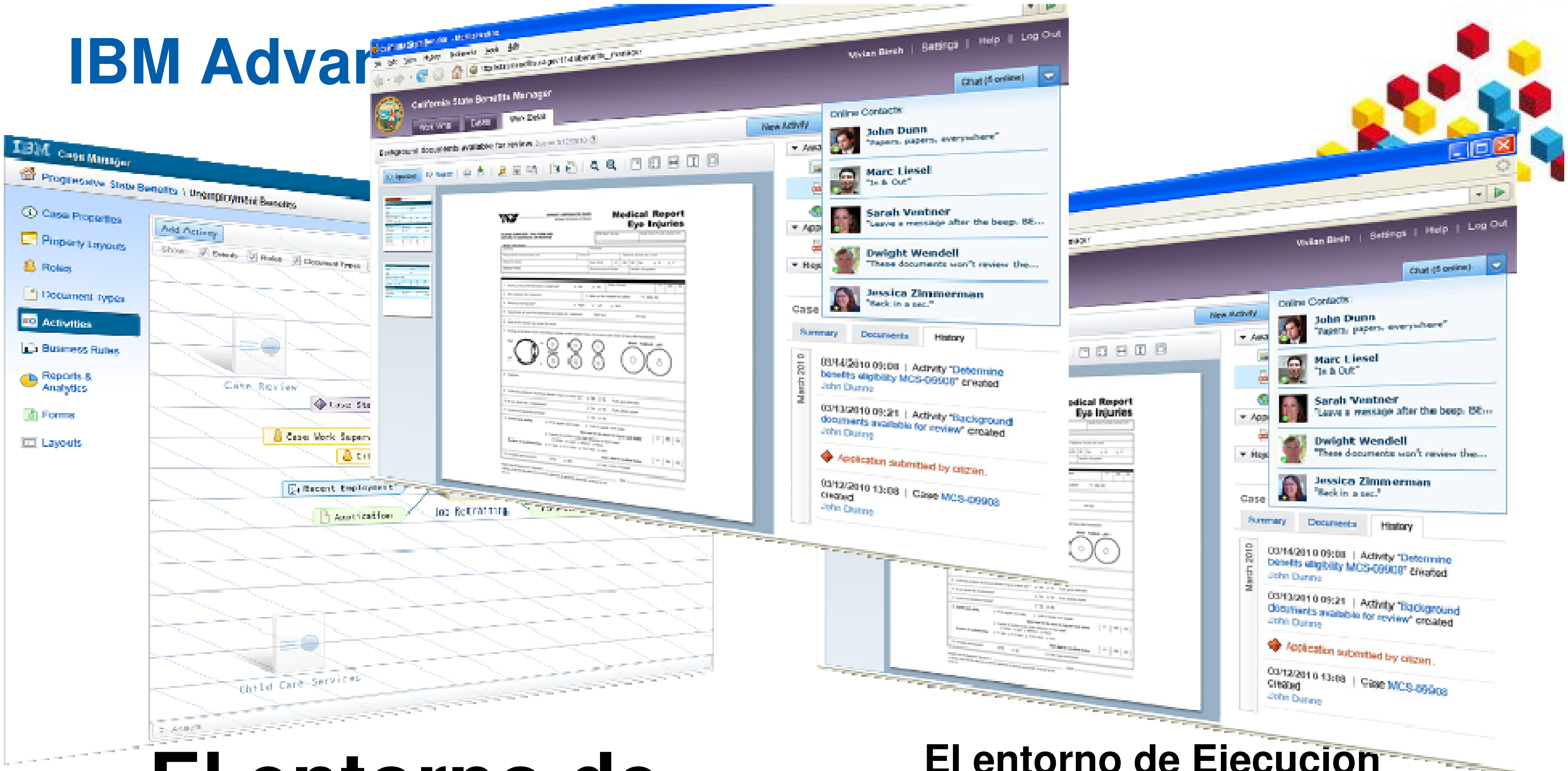
Advanced Case Management

Case Application Design
Case Templates
Case Activities
Case Analytics
Case Runtime Framework
Case Infrastructure
360º View of Case
Case Context
Case Lifecycle Management

Content
Events
Workflow
Rules
Collaboration
Social Software
Monitoring & Analytics

people o *process* o *information*

IBM Advan


IBM Case Manager
Progressive State Benefits \ Unemployment Benefits
Case Properties
Property Layouts
Roles
Document Types
Activities
Business Rules
Reports & Analytics
Forms
Layouts
Add Activity
Case Review
Child Care Services
California State Benefits Manager
Vivian Birch | Settings | Help | Log Out
Chat (5 online)
New Activity
Online Contacts
Medical Report Eye Injuries
Summary
Documents
History
March 2010

John Dunn "Papers, papers, everywhere"

Marc Liesel "In & Out"

Sarah Ventner "Leave a message after the beep. BE…

Dwight Wendell "These documents won't review the…

Jessica Zimmerman "Back in a sec."

03/14/2010 09:08 | Activity "Determine benefits eligibility MCS-09908" created
John Dunne

03/13/2010 09:21 | Activity "Background documents available for review" created
John Dunne

Application submitted by citizen.

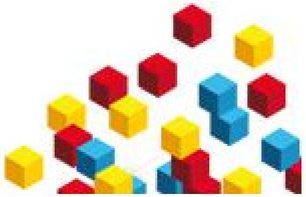
03/12/2010 13:08 | Case MCS-09908 created
John Dunne

El entorno de Diseño

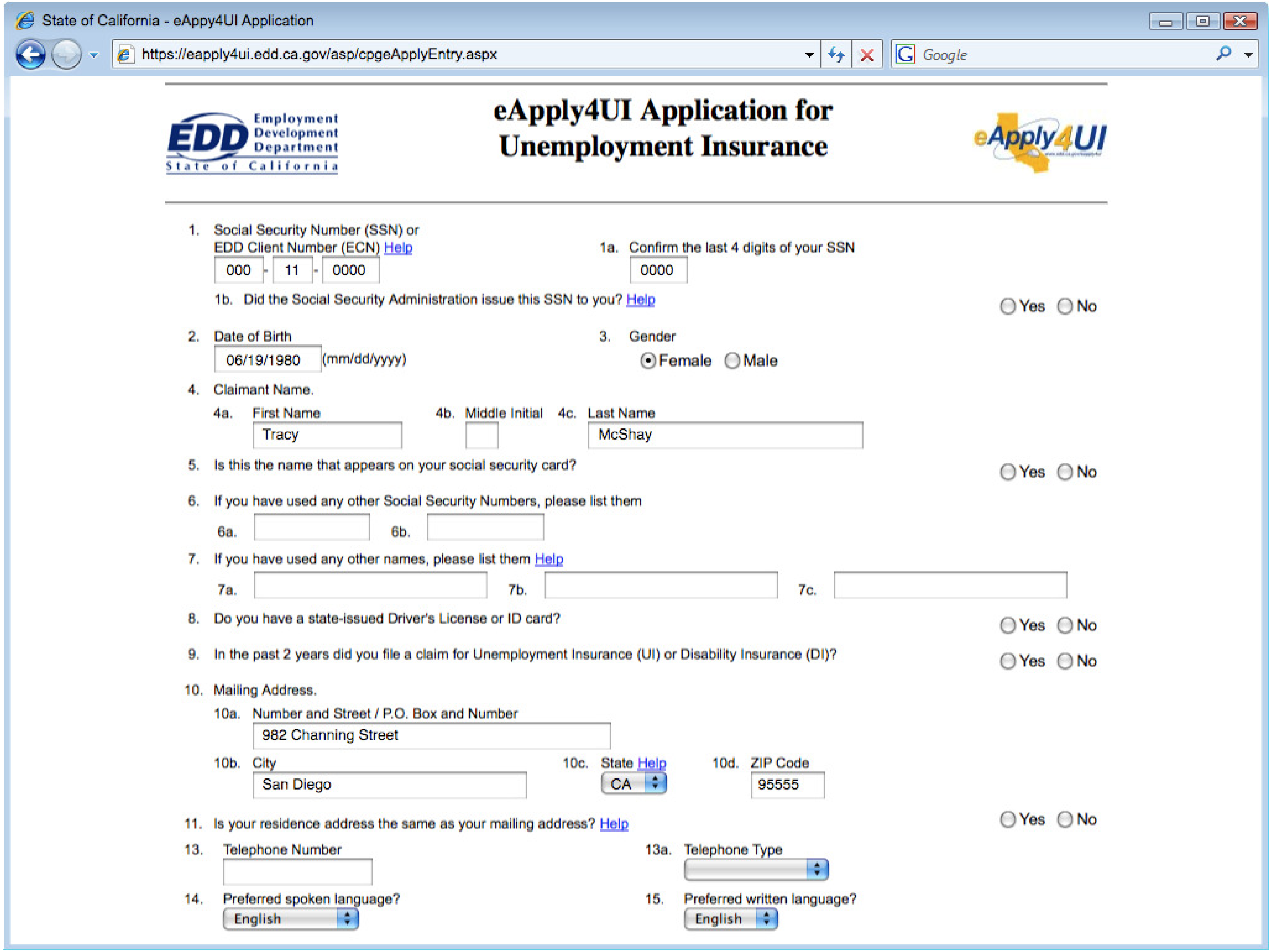
- Fácil de utilizar, múltiples asistentes

El entorno de Ejecucion

- Personalizable y basado en roles
- Flexible y extensible
- Proporciona el contexto de trabajo para el expediente
- Alinea usuarios, contenidos y procesos



Advanced Case Management
Cómo va a ser el producto


State of California - eAppy4UI Application
https://eapply4ui.edd.ca.gov/asp/cpgeApplyEntry.aspx
Google
EDD Employment Development Department State of California
eApply4UI

eApply4UI Application for Unemployment Insurance

1. Social Security Number (SSN) or EDD Client Number (ECN) Help
000 - 11 - 0000

1a. Confirm the last 4 digits of your SSN
0000

1b. Did the Social Security Administration issue this SSN to you? Help ○ Yes ○ No

2. Date of Birth
06/19/1980 (mm/dd/yyyy)

3. Gender
● Female ○ Male

4. Claimant Name.

4a. First Name: Tracy
4b. Middle Initial:
4c. Last Name: McShay

5. Is this the name that appears on your social security card? ○ Yes ○ No

6. If you have used any other Social Security Numbers, please list them
6a.
6b.

7. If you have used any other names, please list them Help
7a.
7b.
7c.

8. Do you have a state-issued Driver's License or ID card? ○ Yes ○ No

9. In the past 2 years did you file a claim for Unemployment Insurance (UI) or Disability Insurance (DI)? ○ Yes ○ No

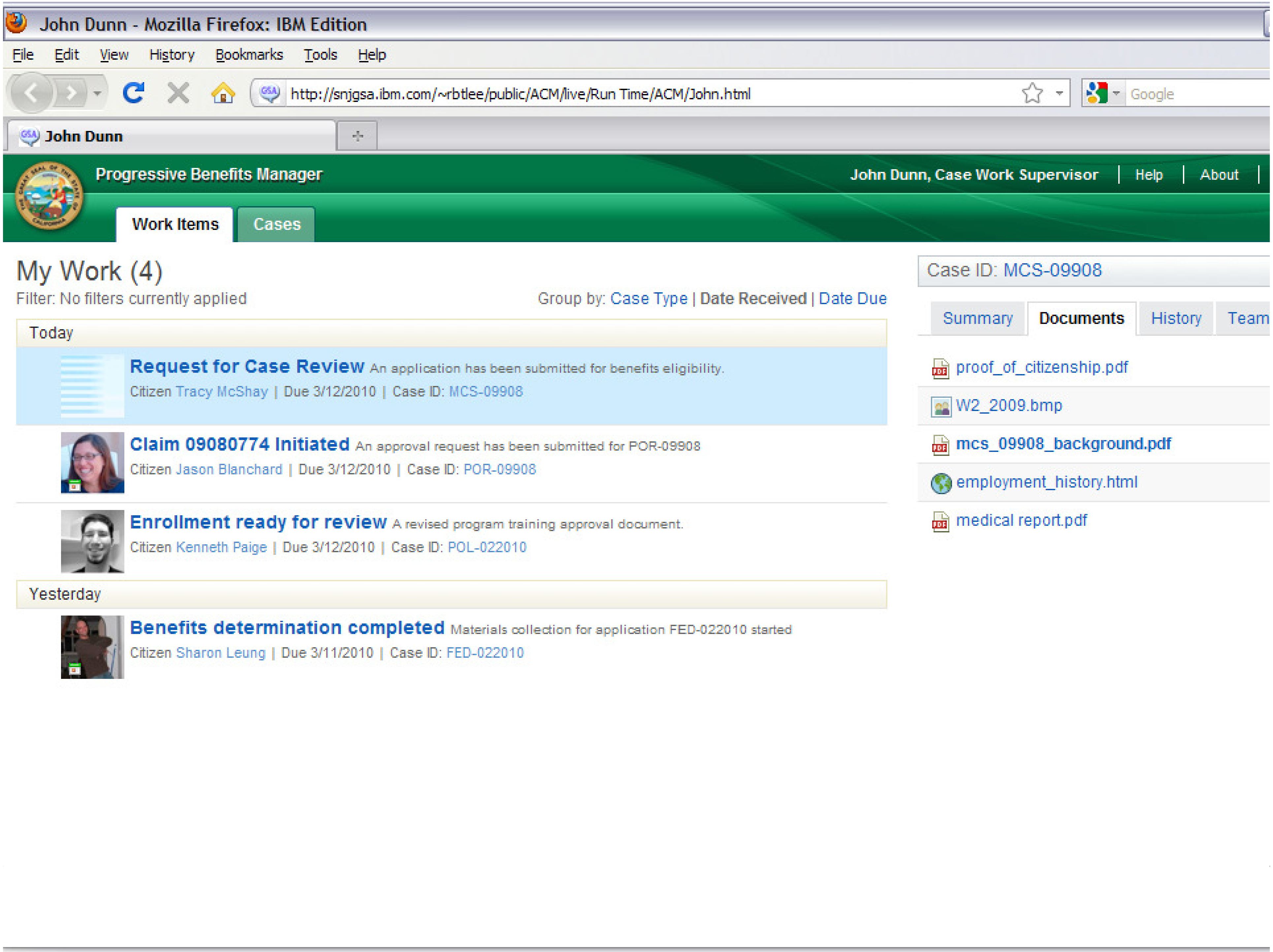
10. Mailing Address.

10a. Number and Street / P.O. Box and Number: 982 Channing Street
10b. City: San Diego
10c. State Help: CA
10d. ZIP Code: 95555

11. Is your residence address the same as your mailing address? Help ○ Yes ○ No

13. Telephone Number:
13a. Telephone Type:

14. Preferred spoken language? English
15. Preferred written language? English


John Dunn - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Google
John Dunn
Progressive Benefits Manager
John Dunn, Case Work Supervisor
Help
About
Work Items
Cases
Summary
Documents
History
Team

http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/John.html

My Work (4)

Filter: No filters currently applied

Group by: Case Type | Date Received | Date Due

Today

Request for Case Review An application has been submitted for benefits eligibility.
Citizen Tracy McShay | Due 3/12/2010 | Case ID: MCS-09908

Claim 09080774 Initiated An approval request has been submitted for POR-09908
Citizen Jason Blanchard | Due 3/12/2010 | Case ID: POR-09908

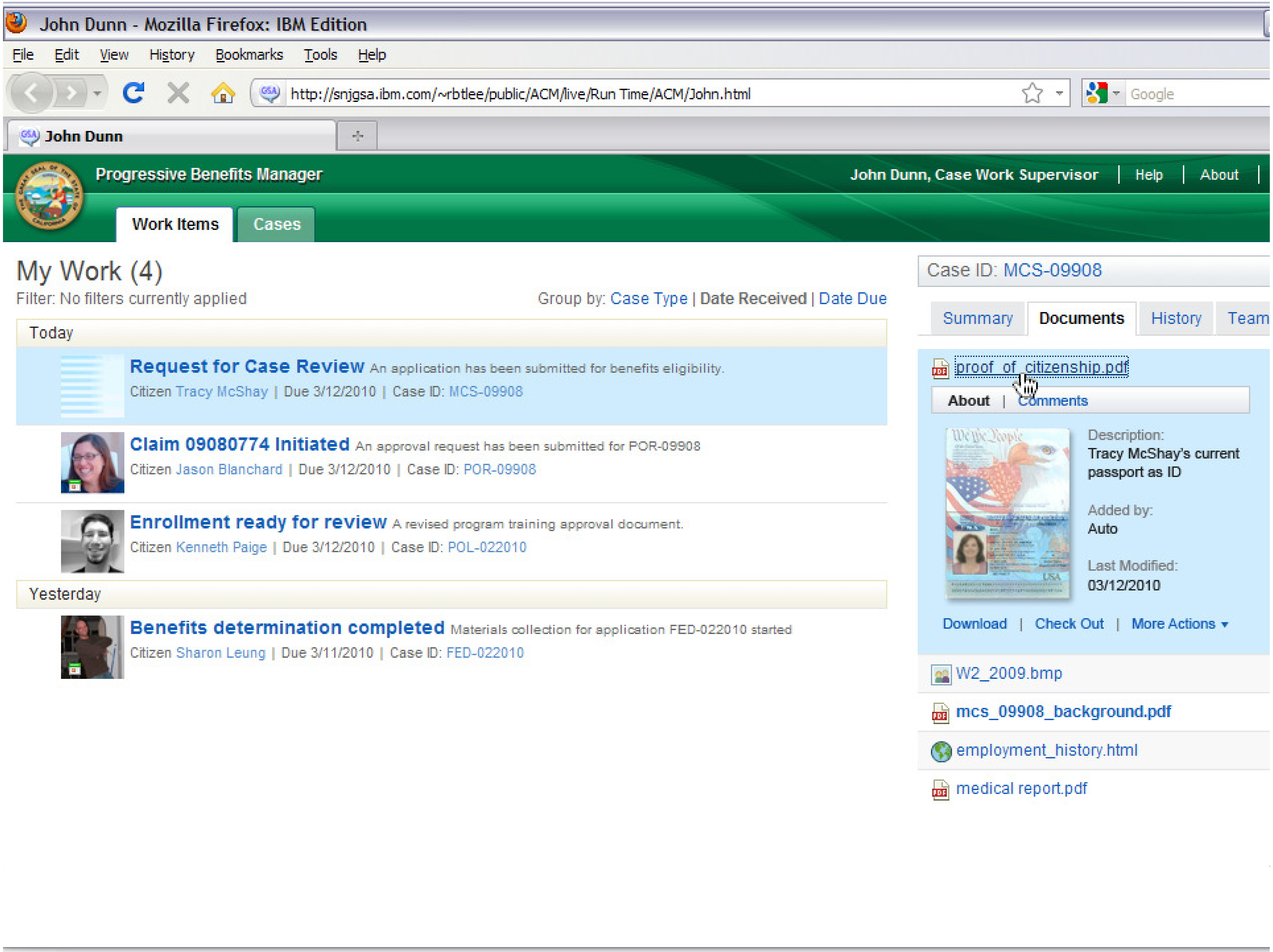
Enrollment ready for review A revised program training approval document.
Citizen Kenneth Paige | Due 3/12/2010 | Case ID: POL-022010

Yesterday

Benefits determination completed Materials collection for application FED-022010 started
Citizen Sharon Leung | Due 3/11/2010 | Case ID: FED-022010

Case ID: MCS-09908

- proof_of_citizenship.pdf
- W2_2009.bmp
- mcs_09908_background.pdf
- employment_history.html
- medical report.pdf


John Dunn - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Google
John Dunn
Progressive Benefits Manager
John Dunn, Case Work Supervisor
Help
About
Work Items
Cases

http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/John.html

My Work (4)

Filter: No filters currently applied

Group by: Case Type | Date Received | Date Due

Today

Request for Case Review An application has been submitted for benefits eligibility.
Citizen Tracy McShay | Due 3/12/2010 | Case ID: MCS-09908

Claim 09080774 Initiated An approval request has been submitted for POR-09908
Citizen Jason Blanchard | Due 3/12/2010 | Case ID: POR-09908

Enrollment ready for review A revised program training approval document.
Citizen Kenneth Paige | Due 3/12/2010 | Case ID: POL-022010

Yesterday

Benefits determination completed Materials collection for application FED-022010 started
Citizen Sharon Leung | Due 3/11/2010 | Case ID: FED-022010

Case ID: MCS-09908

Summary
Documents
History
Team

proof_of_citizenship.pdf

About | Comments

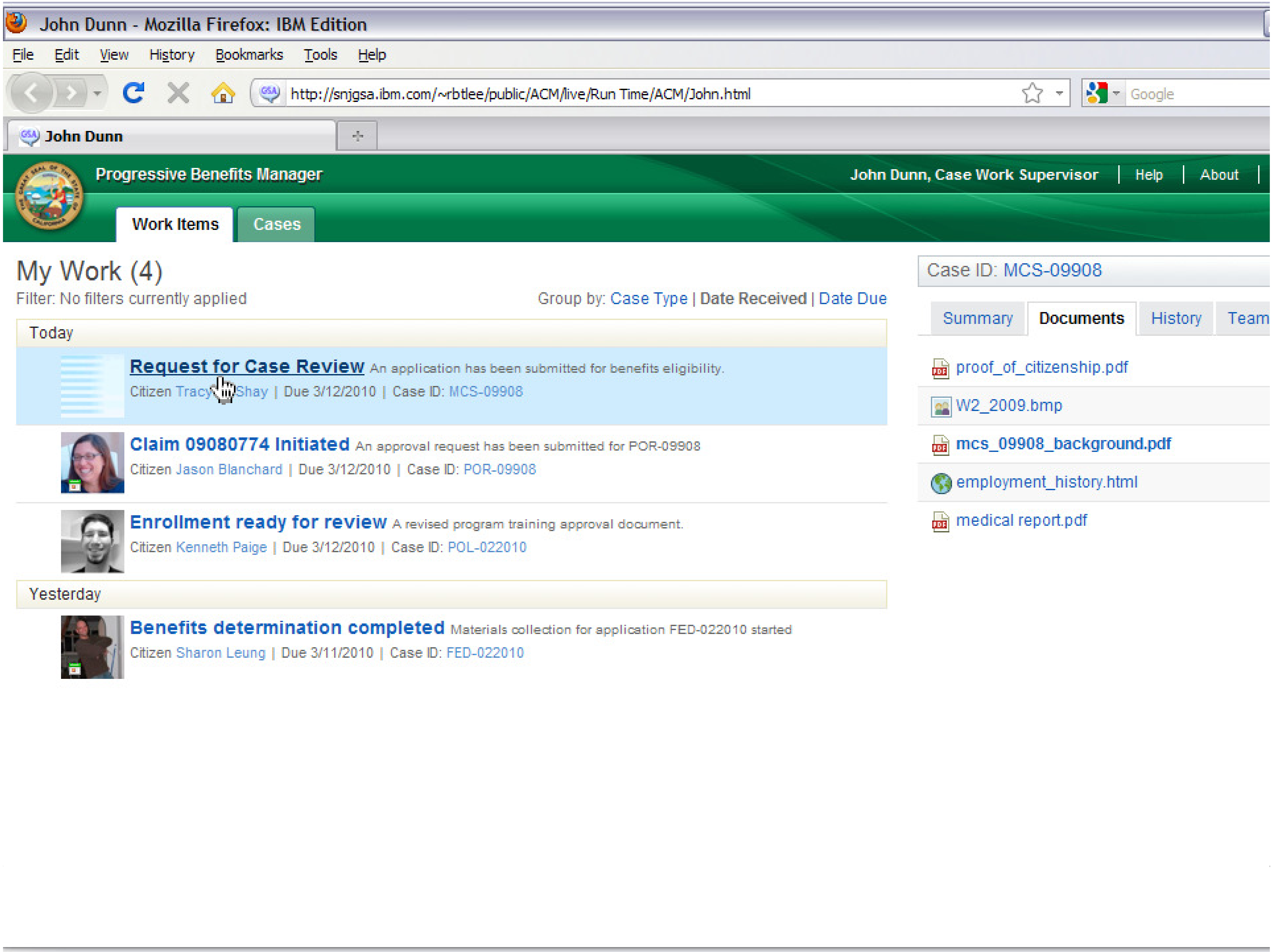
Description:
Tracy McShay's current passport as ID

Added by:
Auto

Last Modified:
03/12/2010

Download | Check Out | More Actions ▾

W2_2009.bmp
mcs_09908_background.pdf
employment_history.html
medical report.pdf


John Dunn - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/John.html
Google
John Dunn
Progressive Benefits Manager
John Dunn, Case Work Supervisor
Help
About
Work Items
Cases

My Work (4)

Filter: No filters currently applied

Group by: Case Type | Date Received | Date Due

Today

Request for Case Review An application has been submitted for benefits eligibility.
Citizen Tracy Shay | Due 3/12/2010 | Case ID: MCS-09908

Claim 09080774 Initiated An approval request has been submitted for POR-09908
Citizen Jason Blanchard | Due 3/12/2010 | Case ID: POR-09908

Enrollment ready for review A revised program training approval document.
Citizen Kenneth Paige | Due 3/12/2010 | Case ID: POL-022010

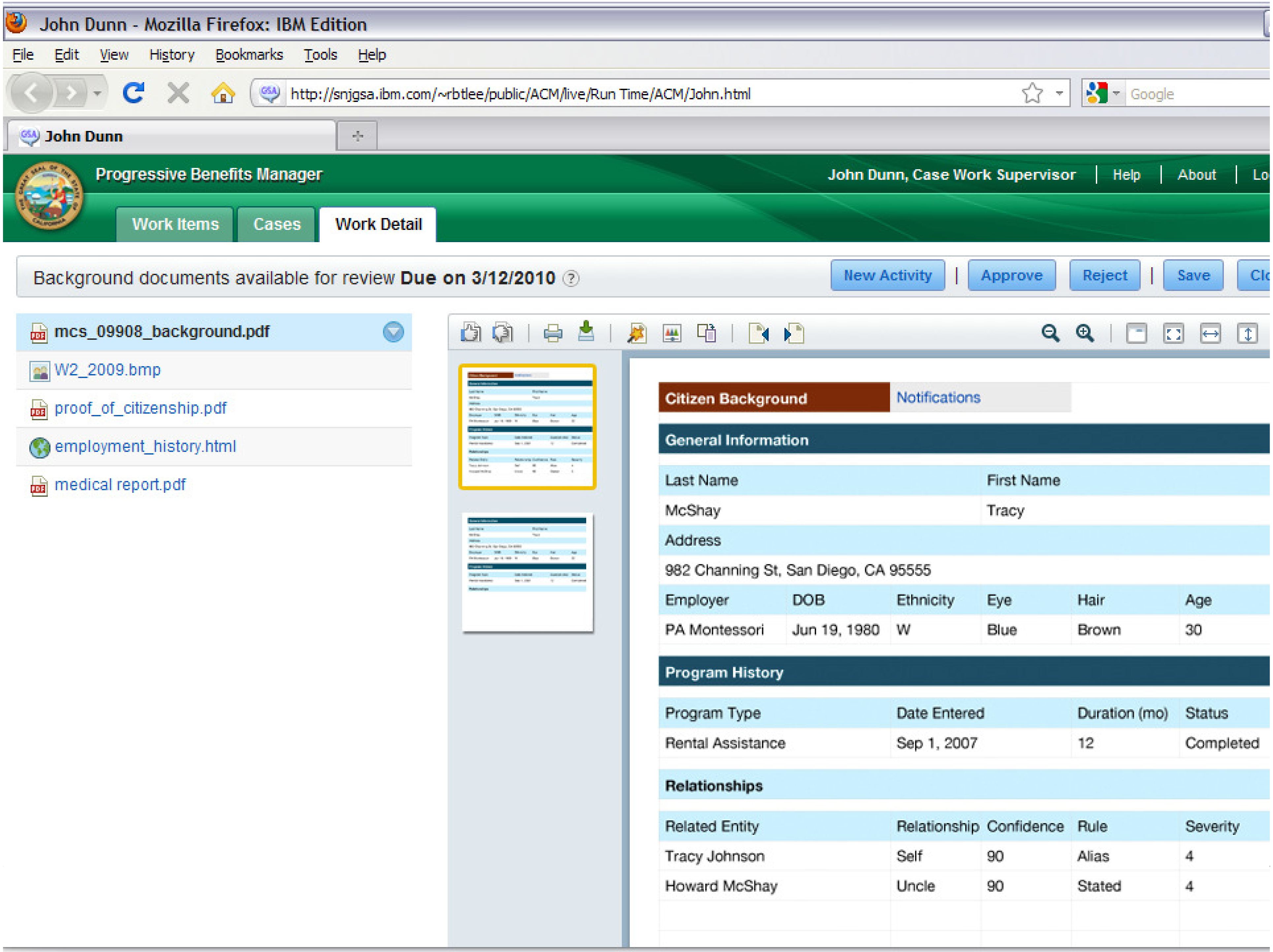
Yesterday

Benefits determination completed Materials collection for application FED-022010 started
Citizen Sharon Leung | Due 3/11/2010 | Case ID: FED-022010

Case ID: MCS-09908

Summary
Documents
History
Team

proof_of_citizenship.pdf
W2_2009.bmp
mcs_09908_background.pdf
employment_history.html
medical report.pdf


John Dunn - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Google
John Dunn
Progressive Benefits Manager
John Dunn, Case Work Supervisor
Help
About
Lo
Work Items
Cases
Work Detail
New Activity
Approve
Reject
Save
Clo

http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/John.html

Background documents available for review **Due on 3/12/2010**

- **mcs_09908_background.pdf**
- W2_2009.bmp
- proof_of_citizenship.pdf
- employment_history.html
- medical report.pdf

Citizen Background | Notifications

General Information

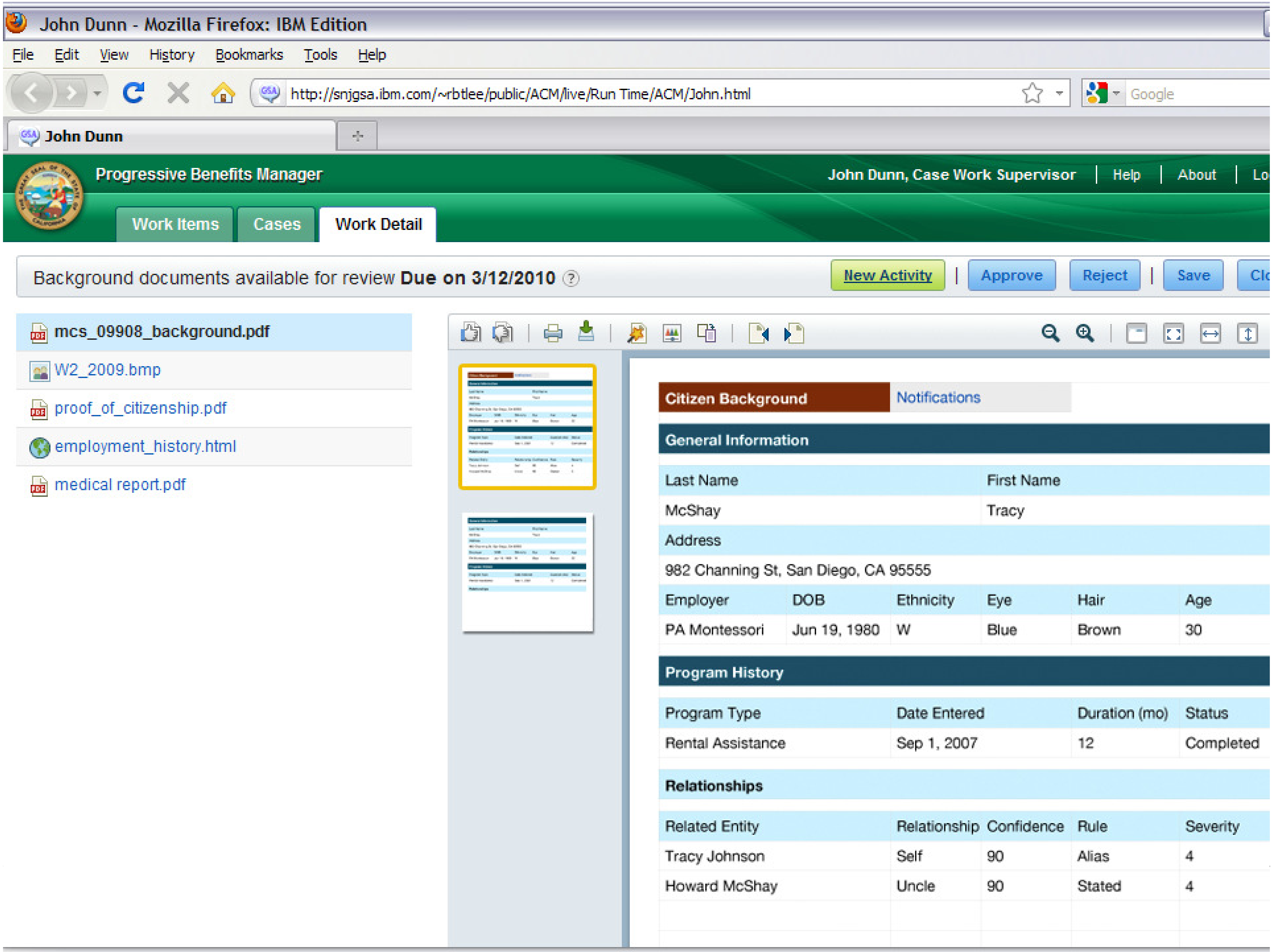
Last Name			First Name		
McShay			Tracy		
Address					
982 Channing St, San Diego, CA 95555					
Employer	DOB	Ethnicity	Eye	Hair	Age
PA Montessori	Jun 19, 1980	W	Blue	Brown	30

Program History

Program Type	Date Entered	Duration (mo)	Status
Rental Assistance	Sep 1, 2007	12	Completed

Relationships

Related Entity	Relationship	Confidence	Rule	Severity
Tracy Johnson	Self	90	Alias	4
Howard McShay	Uncle	90	Stated	4


John Dunn - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/John.html
Google
John Dunn
Progressive Benefits Manager
John Dunn, Case Work Supervisor
Help
About
Lo
Work Items
Cases
Work Detail
New Activity
Approve
Reject
Save
Cl

Background documents available for review **Due on 3/12/2010**

- **mcs_09908_background.pdf**
- W2_2009.bmp
- proof_of_citizenship.pdf
- employment_history.html
- medical report.pdf

Citizen Background Notifications

General Information

Last Name	First Name
McShay	Tracy

Address

982 Channing St, San Diego, CA 95555

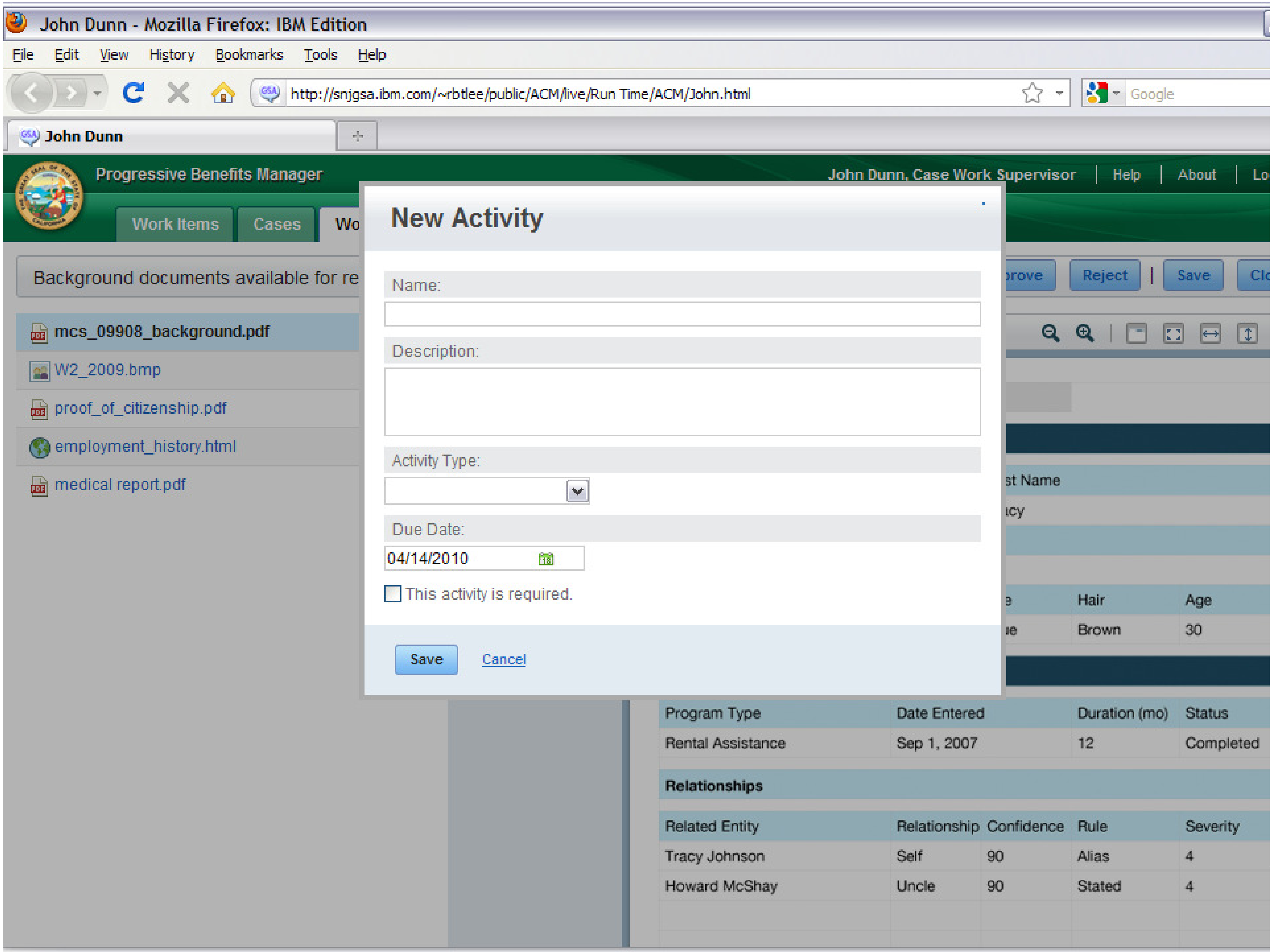
Employer	DOB	Ethnicity	Eye	Hair	Age
PA Montessori	Jun 19, 1980	W	Blue	Brown	30

Program History

Program Type	Date Entered	Duration (mo)	Status
Rental Assistance	Sep 1, 2007	12	Completed

Relationships

Related Entity	Relationship	Confidence	Rule	Severity
Tracy Johnson	Self	90	Alias	4
Howard McShay	Uncle	90	Stated	4


John Dunn - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Google
John Dunn
Progressive Benefits Manager
John Dunn, Case Work Supervisor
Help
About
Lo
Work Items
Cases
Wo
rove
Reject
Save
Cl

http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/John.html

Background documents available for re

- mcs_09908_background.pdf
- W2_2009.bmp
- proof_of_citizenship.pdf
- employment_history.html
- medical report.pdf

New Activity

Name:

Description:

Activity Type:

Due Date: 04/14/2010

☐ This activity is required.

Save
Cancel

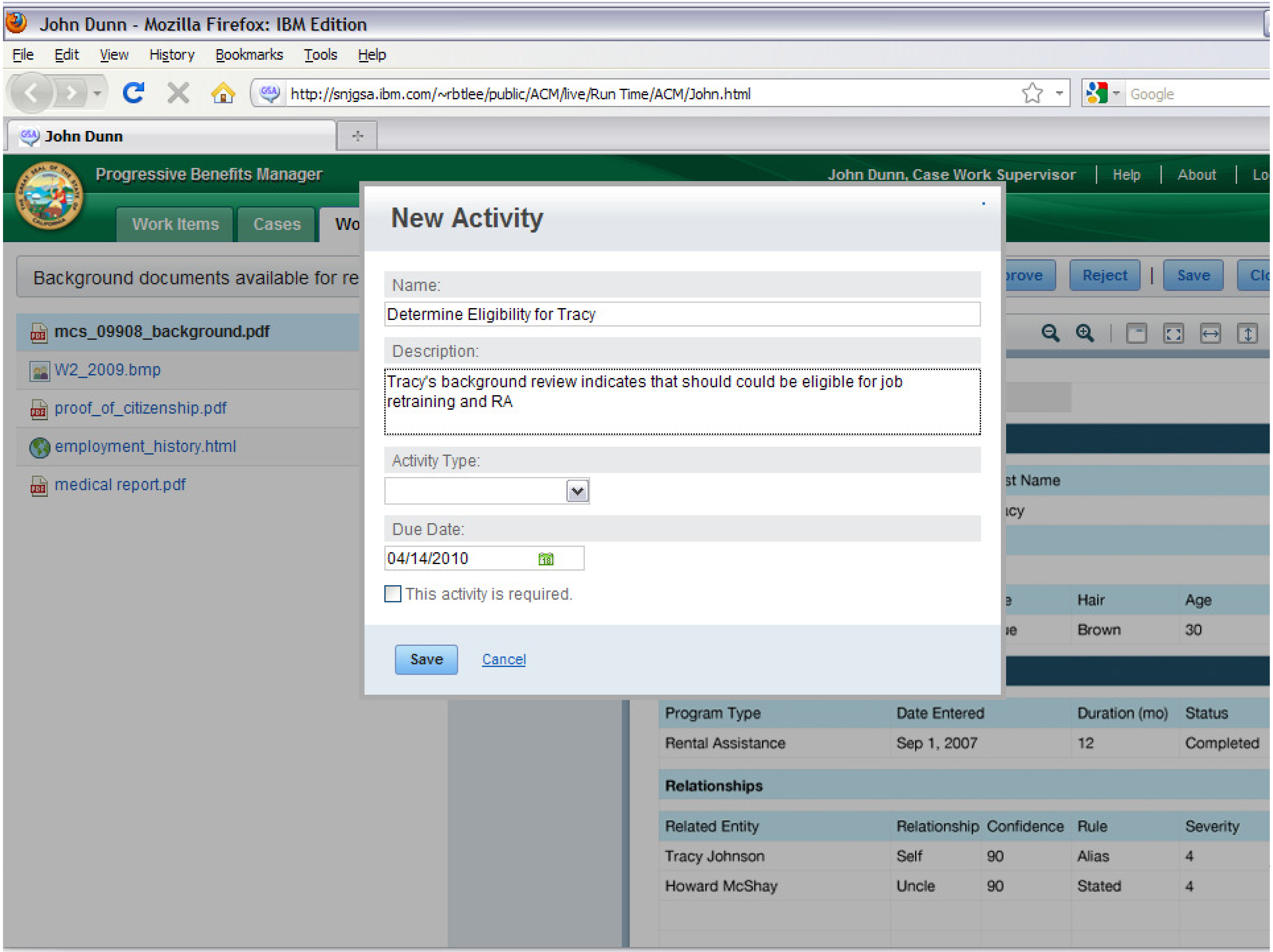
st Name
icy

e	Hair	Age
ie	Brown	30

Program Type	Date Entered	Duration (mo)	Status
Rental Assistance	Sep 1, 2007	12	Completed

Relationships

Related Entity	Relationship	Confidence	Rule	Severity
Tracy Johnson	Self	90	Alias	4
Howard McShay	Uncle	90	Stated	4


John Dunn - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/John.html
Google
John Dunn
Progressive Benefits Manager
John Dunn, Case Work Supervisor
Help
About
Lo
Work Items
Cases
Wo
rove
Reject
Save
Cl
Background documents available for re
mcs_09908_background.pdf
W2_2009.bmp
proof_of_citizenship.pdf
employment_history.html
medical report.pdf
st Name
cy
e
Hair
Age
e
Brown
30

New Activity

Name:

Determine Eligibility for Tracy

Description:

Tracy's background review indicates that should could be eligible for job retraining and RA

Activity Type:

Due Date:

04/14/2010

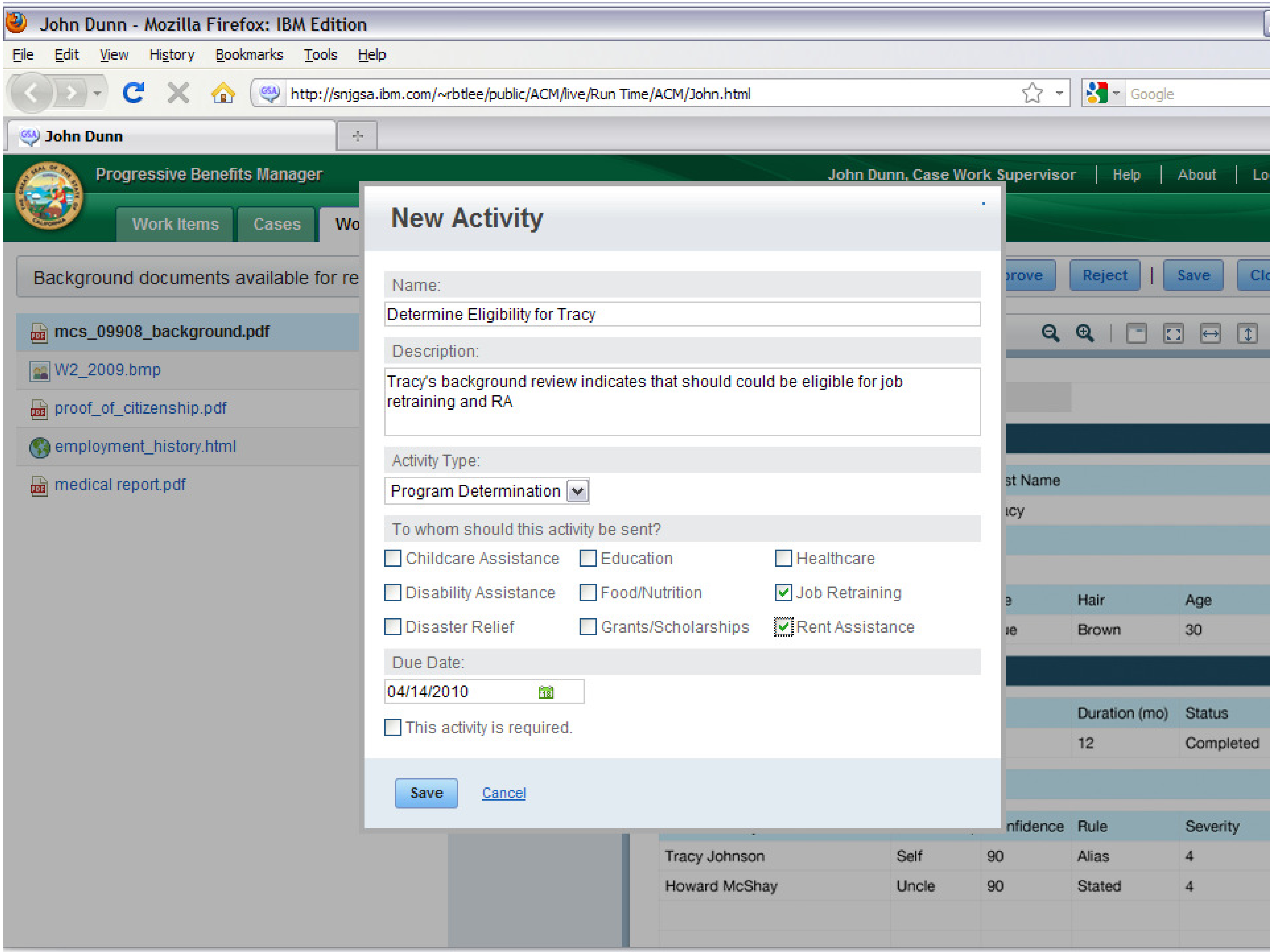
☐ This activity is required.

Save
Cancel

Program Type	Date Entered	Duration (mo)	Status
Rental Assistance	Sep 1, 2007	12	Completed

Relationships

Related Entity	Relationship	Confidence	Rule	Severity
Tracy Johnson	Self	90	Alias	4
Howard McShay	Uncle	90	Stated	4


John Dunn - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/John.html
Google
John Dunn
Progressive Benefits Manager
John Dunn, Case Work Supervisor
Help
About
Lo
Work Items
Cases
Wo
rove
Reject
Save
Clo

Background documents available for re

mcs_09908_background.pdf
W2_2009.bmp
proof_of_citizenship.pdf
employment_history.html
medical report.pdf

New Activity

Name:
Determine Eligibility for Tracy

Description:
Tracy's background review indicates that should could be eligible for job retraining and RA

Activity Type:
Program Determination

To whom should this activity be sent?

☐ Childcare Assistance	☐ Education	☐ Healthcare
☐ Disability Assistance	☐ Food/Nutrition	☑ Job Retraining
☐ Disaster Relief	☐ Grants/Scholarships	☑ Rent Assistance

Due Date:
04/14/2010

☐ This activity is required.

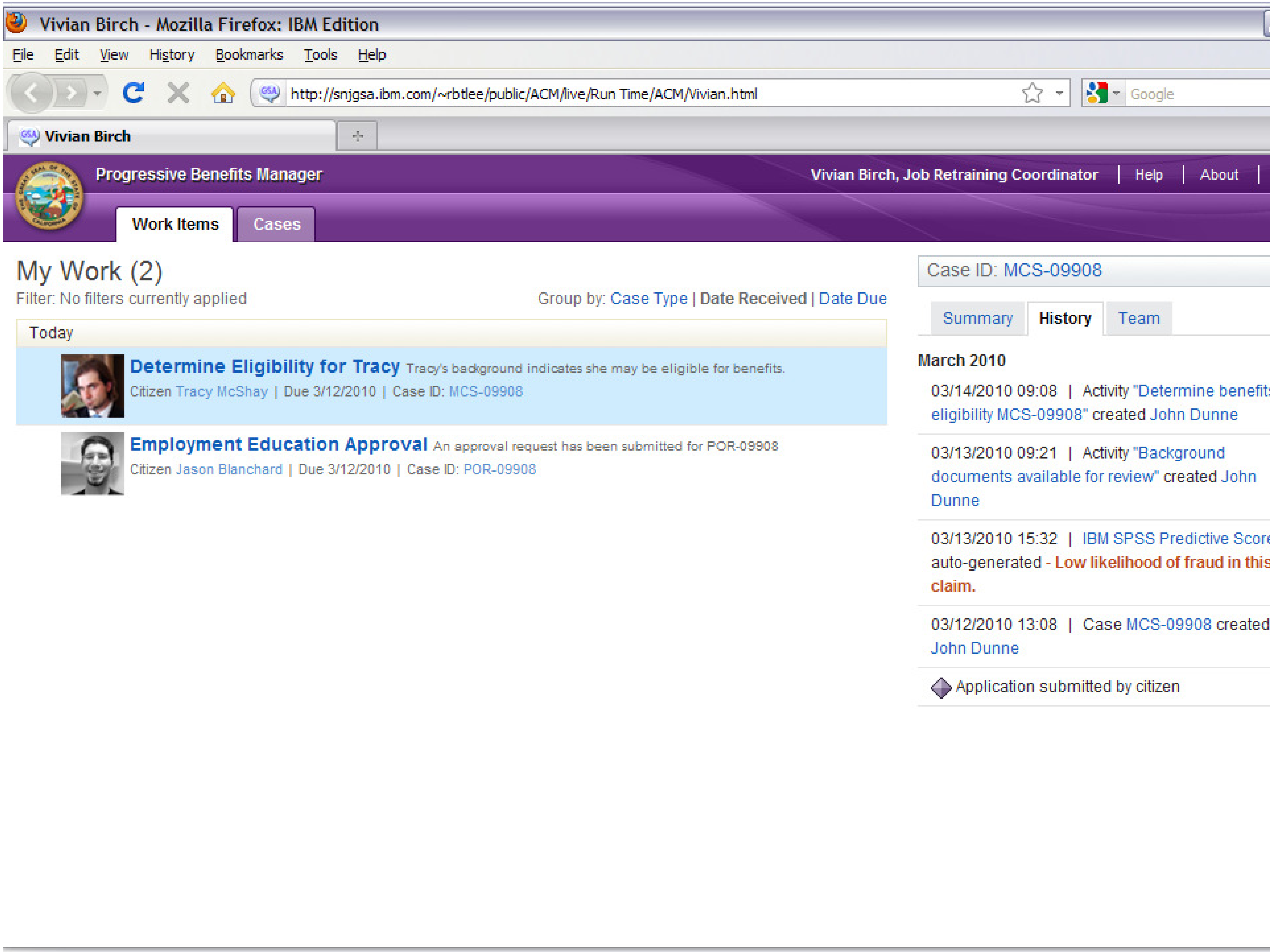
Save
Cancel

st Name			
icy			

	Hair	Age
e	Hair	Age
ie	Brown	30

Duration (mo)	Status
12	Completed

		nfidence	Rule	Severity
Tracy Johnson	Self	90	Alias	4
Howard McShay	Uncle	90	Stated	4


Vivian Birch - Mozilla Firefox: IBM Edition
File Edit View History Bookmarks Tools Help
http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/Vivian.html
Google
Vivian Birch
Progressive Benefits Manager
Vivian Birch, Job Retraining Coordinator | Help | About |
Work Items
Cases

My Work (2)

Filter: No filters currently applied

Group by: Case Type | Date Received | Date Due

Today

Determine Eligibility for Tracy Tracy's background indicates she may be eligible for benefits.

Citizen Tracy McShay | Due 3/12/2010 | Case ID: MCS-09908

Employment Education Approval An approval request has been submitted for POR-09908

Citizen Jason Blanchard | Due 3/12/2010 | Case ID: POR-09908

Case ID: MCS-09908

Summary
History
Team

March 2010

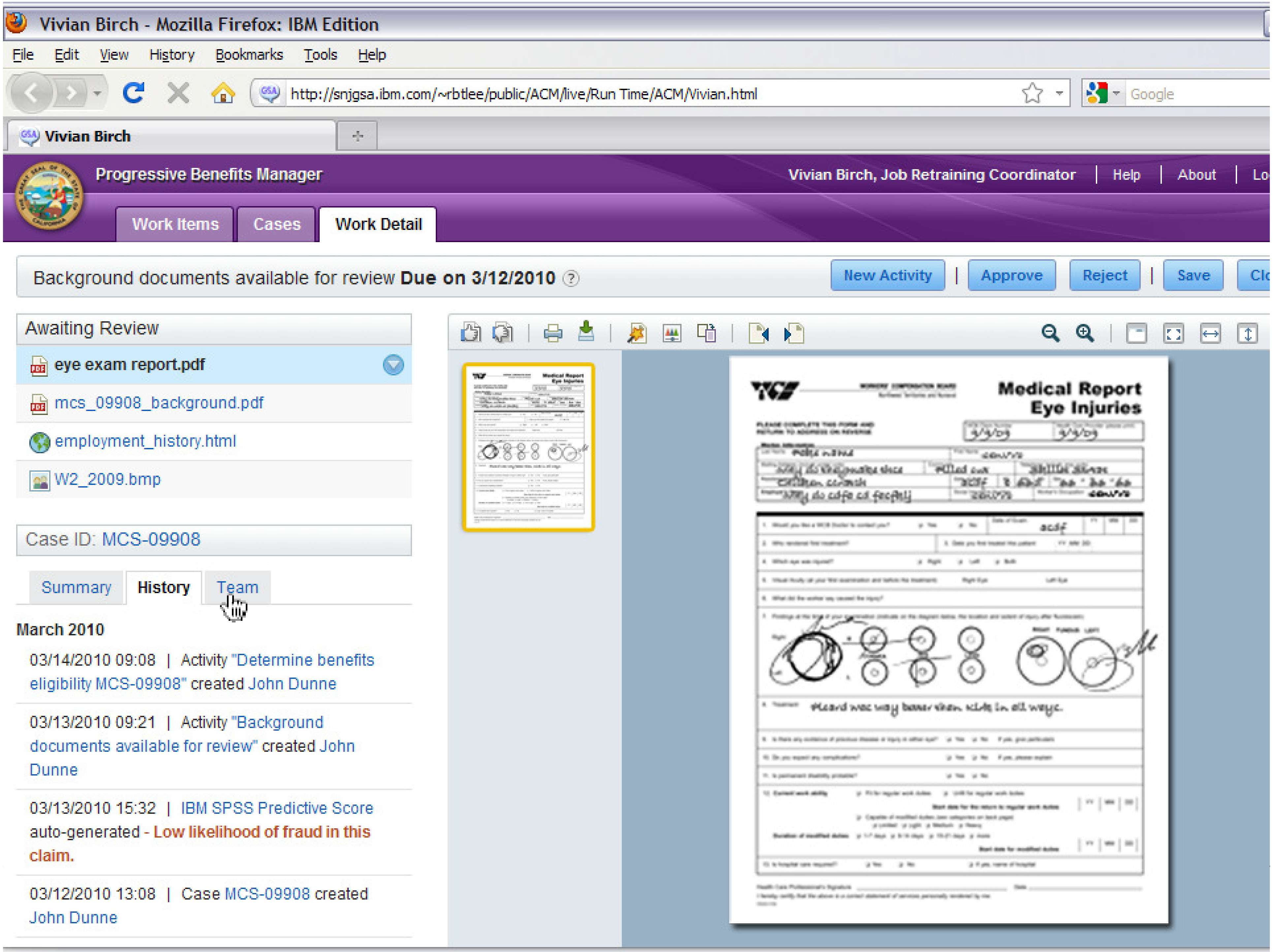
03/14/2010 09:08 | Activity "Determine benefit eligibility MCS-09908" created John Dunne

03/13/2010 09:21 | Activity "Background documents available for review" created John Dunne

03/13/2010 15:32 | IBM SPSS Predictive Scor auto-generated - Low likelihood of fraud in this claim.

03/12/2010 13:08 | Case MCS-09908 created John Dunne

◆ Application submitted by citizen


Vivian Birch - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Google
Vivian Birch
Progressive Benefits Manager
Vivian Birch, Job Retraining Coordinator
Help
About
Work Items
Cases
Work Detail
New Activity
Approve
Reject
Save
Awaiting Review
Summary
History
Team
Medical Report
Eye Injuries

http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/Vivian.html

Background documents available for review **Due on 3/12/2010**

- eye exam report.pdf
- mcs_09908_background.pdf
- employment_history.html
- W2_2009.bmp

Case ID: MCS-09908

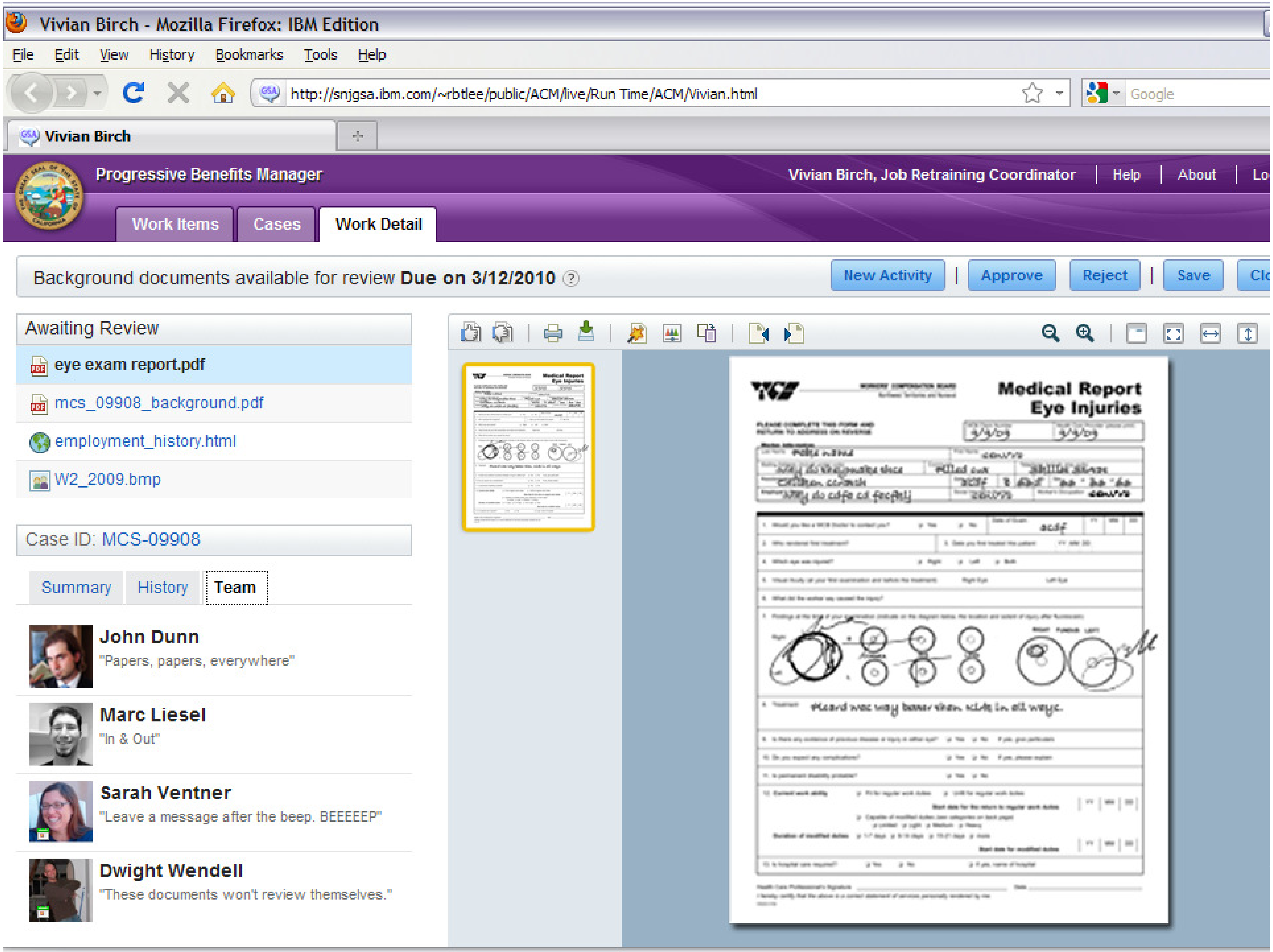
March 2010

03/14/2010 09:08 | Activity "Determine benefits eligibility MCS-09908" created John Dunne

03/13/2010 09:21 | Activity "Background documents available for review" created John Dunne

03/13/2010 15:32 | IBM SPSS Predictive Score auto-generated - Low likelihood of fraud in this claim.

03/12/2010 13:08 | Case MCS-09908 created John Dunne


Vivian Birch - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/Vivian.html
Google
Vivian Birch
Progressive Benefits Manager
Vivian Birch, Job Retraining Coordinator
Help
About
Work Items
Cases
Work Detail
New Activity
Approve
Reject
Save

Background documents available for review **Due on 3/12/2010**

Awaiting Review

- eye exam report.pdf
- mcs_09908_background.pdf
- employment_history.html
- W2_2009.bmp

Case ID: MCS-09908

Summary
History
Team

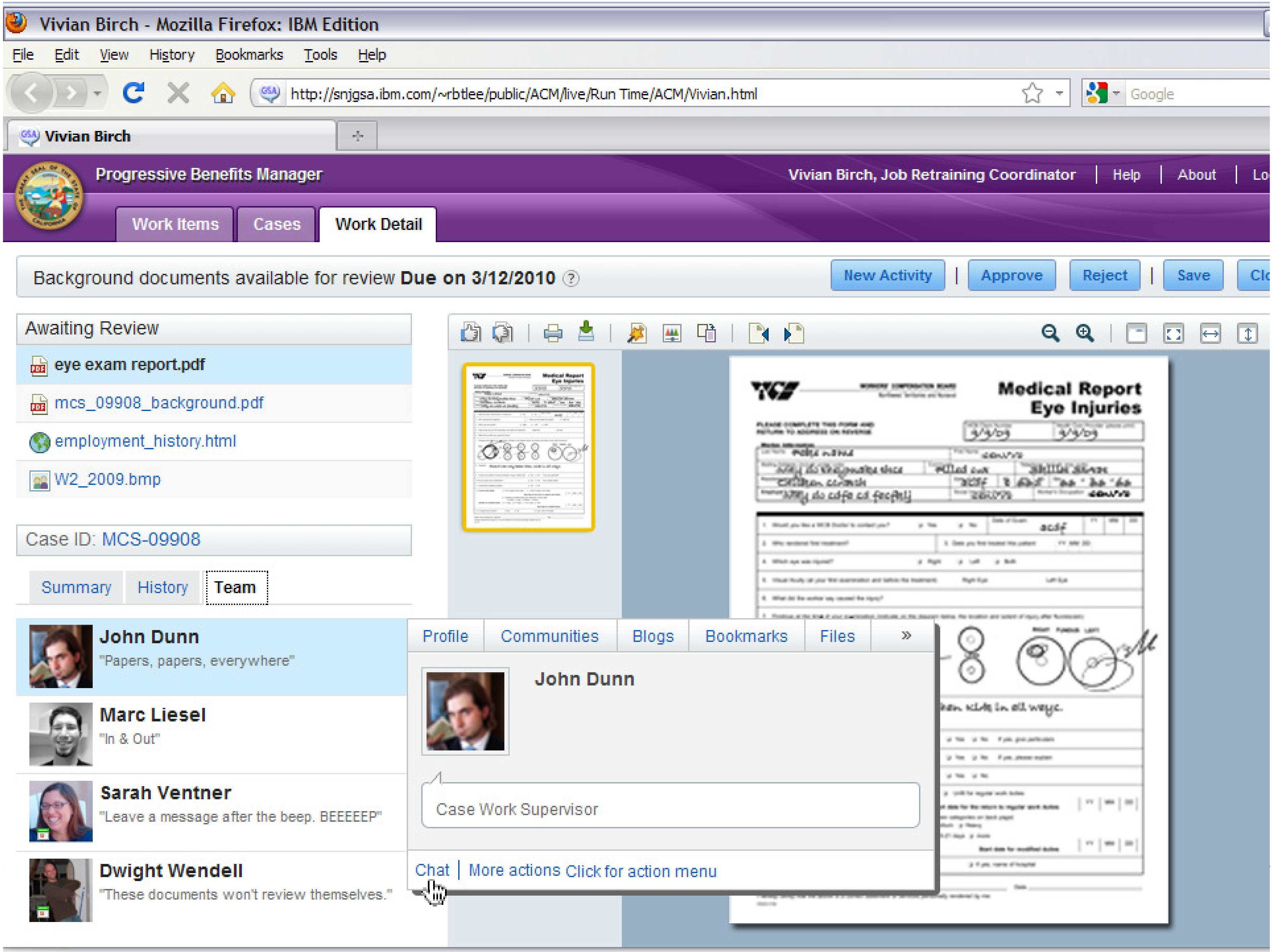
John Dunn
"Papers, papers, everywhere"

Marc Liesel
"In & Out"

Sarah Ventner
"Leave a message after the beep. BEEEEEP"

Dwight Wendell
"These documents won't review themselves."

Medical Report
Eye Injuries


Vivian Birch - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Google
Vivian Birch
Work Items
Cases
Work Detail
New Activity
Approve
Reject
Save
Summary
History
Team
Profile
Communities
Blogs
Bookmarks
Files
»
Chat
More actions
Click for action menu
Medical Report
Eye Injuries

http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/Vivian.html

Progressive Benefits Manager

Vivian Birch, Job Retraining Coordinator | Help | About | Lo

Background documents available for review **Due on 3/12/2010**

Awaiting Review

- eye exam report.pdf
- mcs_09908_background.pdf
- employment_history.html
- W2_2009.bmp

Case ID: MCS-09908

John Dunn
"Papers, papers, everywhere"

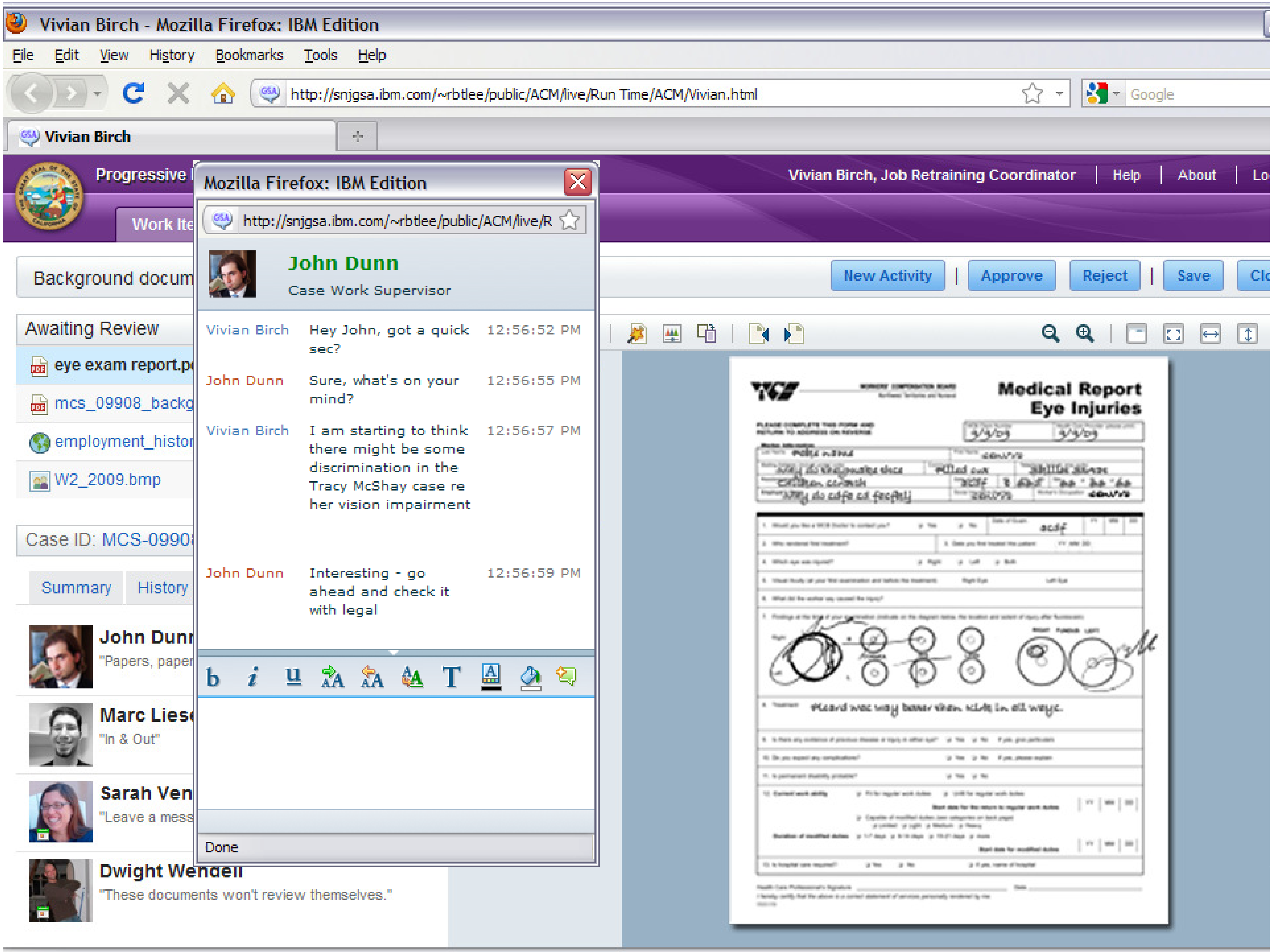
Marc Liesel
"In & Out"

Sarah Ventner
"Leave a message after the beep. BEEEEEP"

Dwight Wendell
"These documents won't review themselves."

John Dunn

Case Work Supervisor

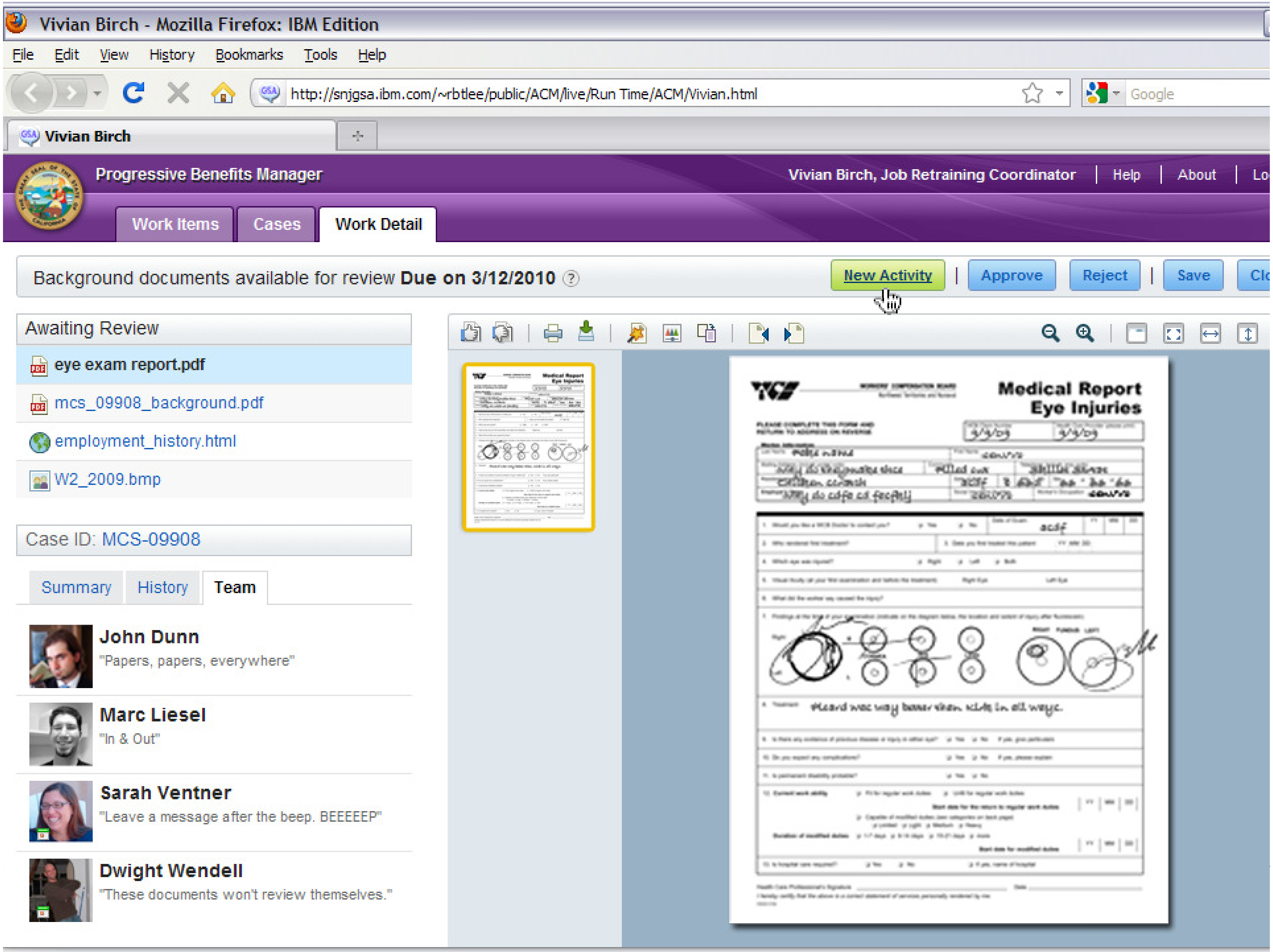

Vivian Birch - Mozilla Firefox: IBM Edition
File Edit View History Bookmarks Tools Help
http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/Vivian.html
Google
Vivian Birch
Progressive
Work Ite
Vivian Birch, Job Retraining Coordinator | Help | About | Lo
Background docum
New Activity | Approve | Reject | Save | Clo
Awaiting Review
eye exam report.p
mcs_09908_backg
employment_histor
W2_2009.bmp
Case ID: MCS-0990
Summary History
John Dunn
"Papers, paper
Marc Liese
"In & Out"
Sarah Ven
"Leave a mess
Dwight Wendell
"These documents won't review themselves."
Mozilla Firefox: IBM Edition
http://snjgsa.ibm.com/~rbtlee/public/ACM/live/R
John Dunn
Case Work Supervisor
Done
Medical Report
Eye Injuries

Vivian Birch — Hey John, got a quick sec? — 12:56:52 PM

John Dunn — Sure, what's on your mind? — 12:56:55 PM

Vivian Birch — I am starting to think there might be some discrimination in the Tracy McShay case re her vision impairment — 12:56:57 PM

John Dunn — Interesting - go ahead and check it with legal — 12:56:59 PM


Vivian Birch - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Google
Vivian Birch
Progressive Benefits Manager
Vivian Birch, Job Retraining Coordinator
Help
About
Lo
Work Items
Cases
Work Detail
New Activity
Approve
Reject
Save
Cl
Summary
History
Team
Medical Report
Eye Injuries

http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/Vivian.html

Background documents available for review **Due on 3/12/2010** ?

Awaiting Review

- eye exam report.pdf
- mcs_09908_background.pdf
- employment_history.html
- W2_2009.bmp

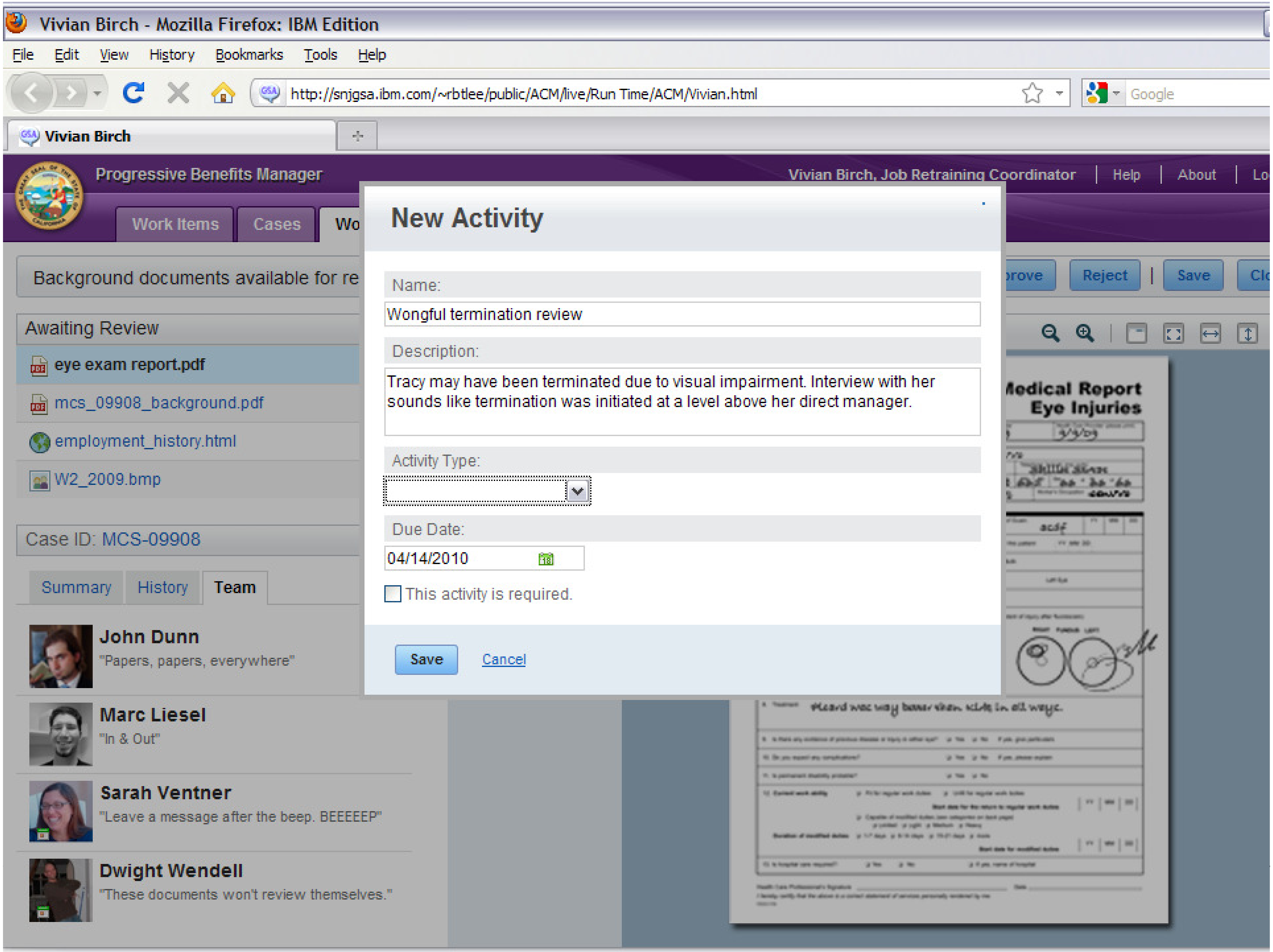
Case ID: MCS-09908

John Dunn
"Papers, papers, everywhere"

Marc Liesel
"In & Out"

Sarah Ventner
"Leave a message after the beep. BEEEEEP"

Dwight Wendell
"These documents won't review themselves."


Vivian Birch - Mozilla Firefox: IBM Edition
File Edit View History Bookmarks Tools Help
http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/Vivian.html
Google
Vivian Birch
Progressive Benefits Manager
Vivian Birch, Job Retraining Coordinator | Help | About | Lo
Work Items
Cases
Wo
rove
Reject
Save
Cl
Medical Report
Eye Injuries
Save
Cancel

Background documents available for re

Awaiting Review

- eye exam report.pdf
- mcs_09908_background.pdf
- employment_history.html
- W2_2009.bmp

Case ID: MCS-09908

Summary | History | **Team**

John Dunn
"Papers, papers, everywhere"

Marc Liesel
"In & Out"

Sarah Ventner
"Leave a message after the beep. BEEEEEP"

Dwight Wendell
"These documents won't review themselves."

New Activity

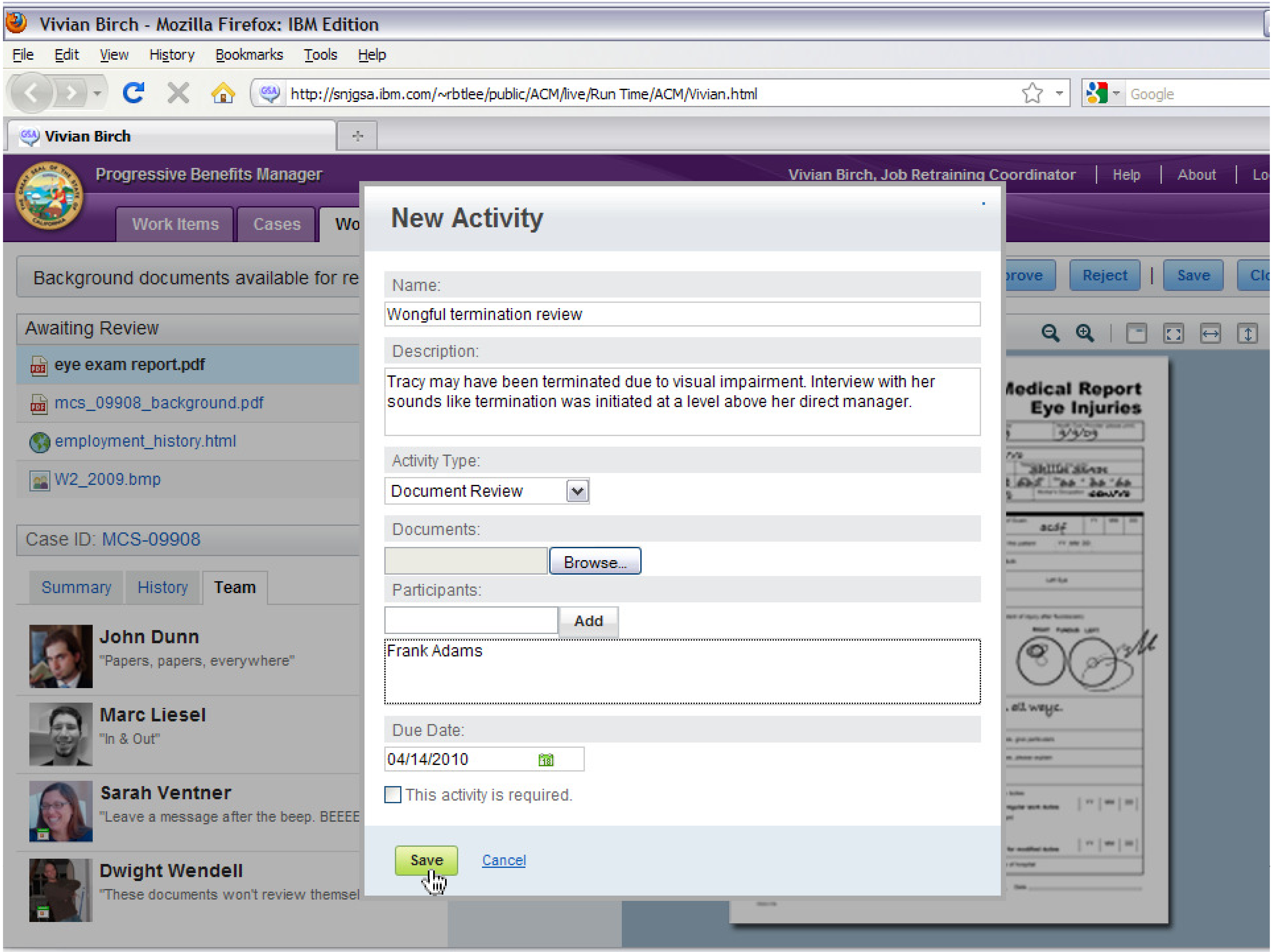
Name:
Wongful termination review

Description:
Tracy may have been terminated due to visual impairment. Interview with her sounds like termination was initiated at a level above her direct manager.

Activity Type:

Due Date:
04/14/2010

☐ This activity is required.


Vivian Birch - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/Vivian.html
Google
Vivian Birch
Progressive Benefits Manager
Vivian Birch, Job Retraining Coordinator
Help
About
Lo
Work Items
Cases
Wo
rove
Reject
Save
Cl
Medical Report
Eye Injuries
Summary
History
Team
Browse...
Add
Save
Cancel

New Activity

Name:

Wongful termination review

Description:

Tracy may have been terminated due to visual impairment. Interview with her sounds like termination was initiated at a level above her direct manager.

Activity Type: Document Review

Documents:

Participants:

Frank Adams

Due Date: 04/14/2010

☐ This activity is required.

Background documents available for re

Awaiting Review

- eye exam report.pdf
- mcs_09908_background.pdf
- employment_history.html
- W2_2009.bmp

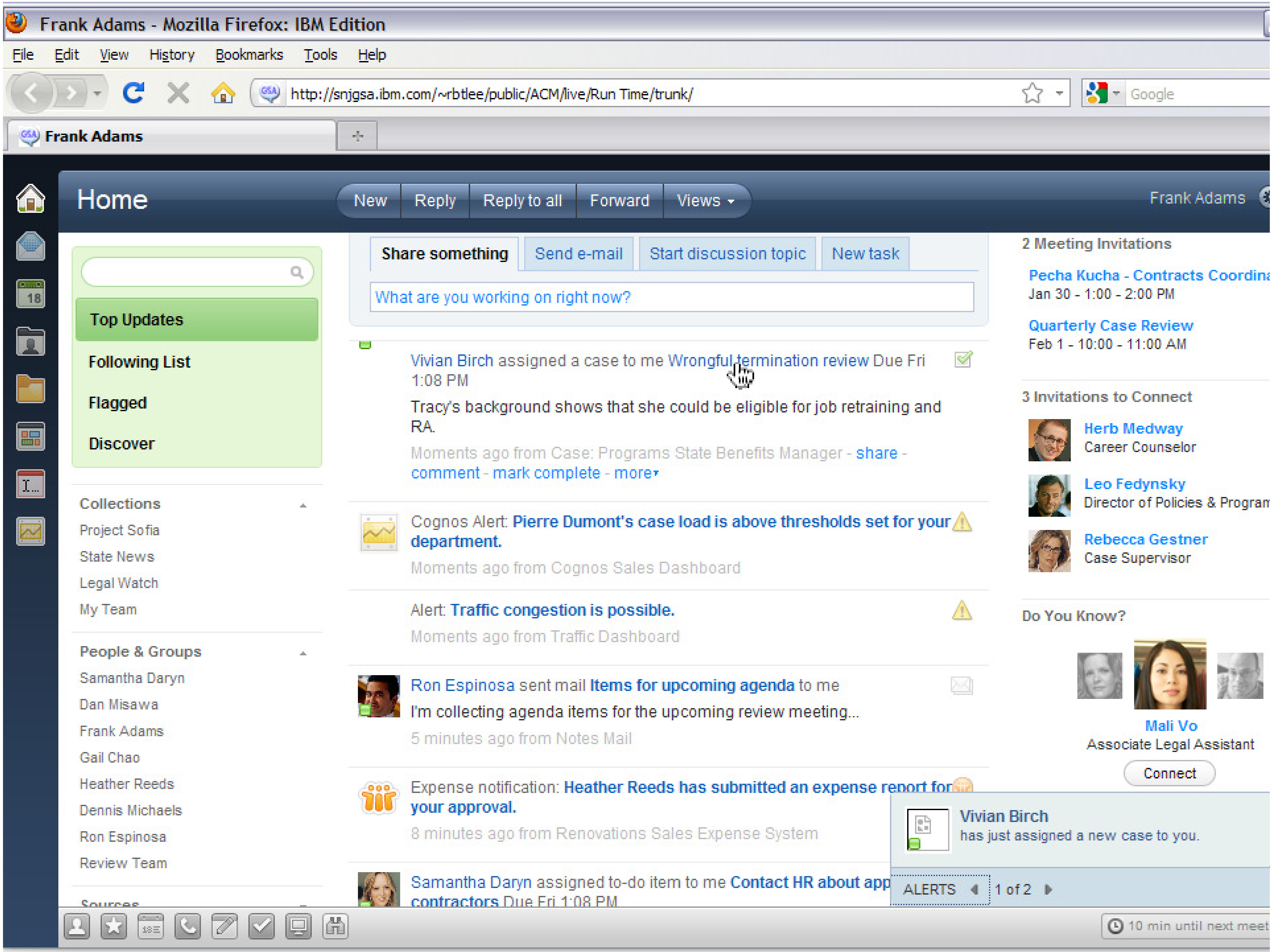
Case ID: MCS-09908

John Dunn
"Papers, papers, everywhere"

Marc Liesel
"In & Out"

Sarah Ventner
"Leave a message after the beep. BEEEE

Dwight Wendell
"These documents won't review themsel


Frank Adams - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Google
Frank Adams
Home
New
Reply
Reply to all
Forward
Views
Frank Adams
18
Top Updates
Following List
Flagged
Discover
Collections
Project Sofia
State News
Legal Watch
My Team
People & Groups
Samantha Daryn
Dan Misawa
Frank Adams
Gail Chao
Heather Reeds
Dennis Michaels
Ron Espinosa
Review Team
Sources
Share something
Send e-mail
Start discussion topic
New task
What are you working on right now?
Connect
ALERTS
1 of 2
10 min until next meet

http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/trunk/

Vivian Birch assigned a case to me Wrongful termination review Due Fri 1:08 PM

Tracy's background shows that she could be eligible for job retraining and RA.

Moments ago from Case: Programs State Benefits Manager - share - comment - mark complete - more

Cognos Alert: Pierre Dumont's case load is above thresholds set for your department.

Moments ago from Cognos Sales Dashboard

Alert: Traffic congestion is possible.

Moments ago from Traffic Dashboard

Ron Espinosa sent mail Items for upcoming agenda to me

I'm collecting agenda items for the upcoming review meeting...

5 minutes ago from Notes Mail

Expense notification: Heather Reeds has submitted an expense report for your approval.

8 minutes ago from Renovations Sales Expense System

Samantha Daryn assigned to-do item to me Contact HR about app contractors Due Fri 1:08 PM

2 Meeting Invitations

Pecha Kucha - Contracts Coordina
Jan 30 - 1:00 - 2:00 PM

Quarterly Case Review
Feb 1 - 10:00 - 11:00 AM

3 Invitations to Connect

Herb Medway
Career Counselor

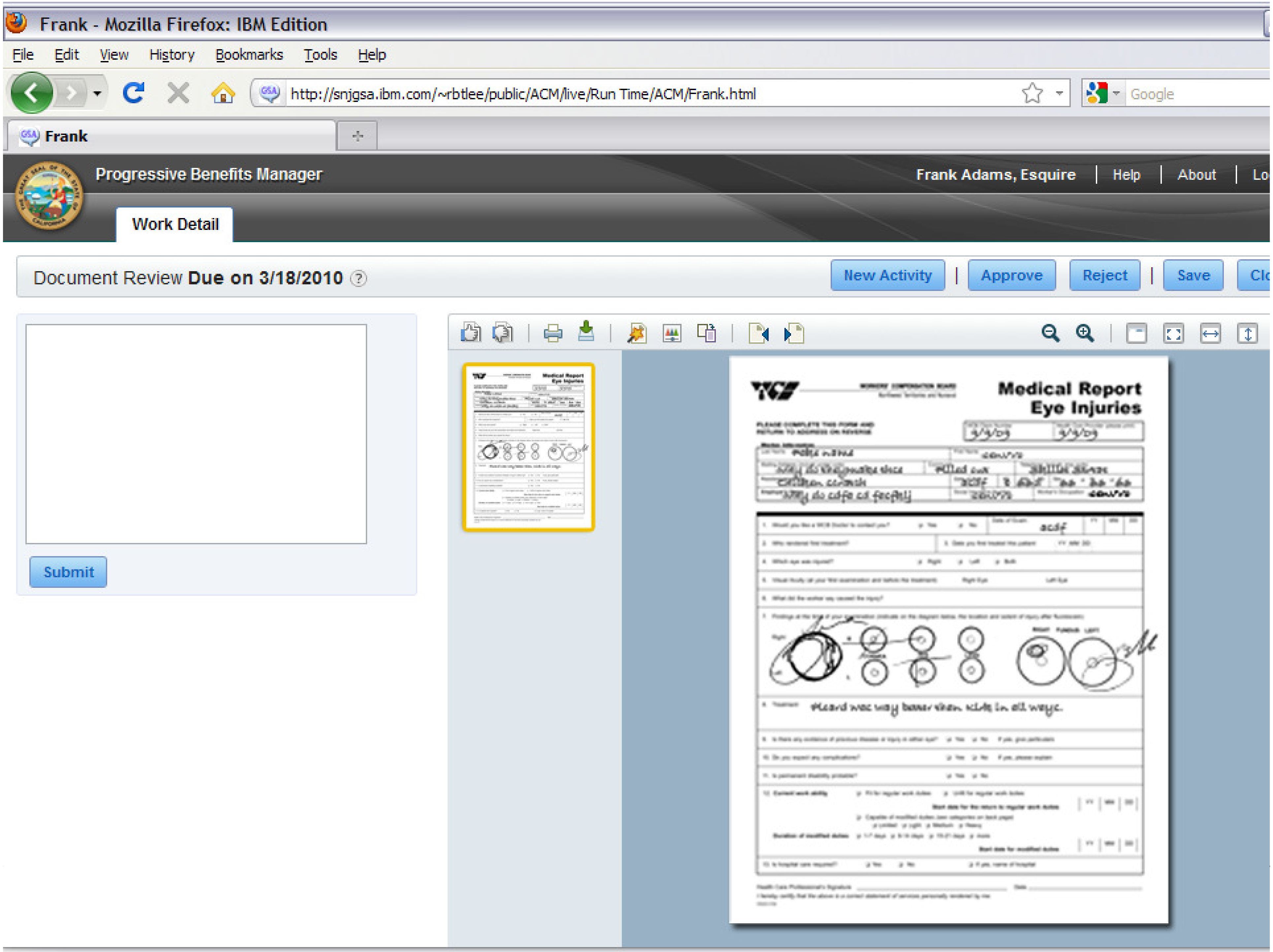
Leo Fedynsky
Director of Policies & Program

Rebecca Gestner
Case Supervisor

Do You Know?

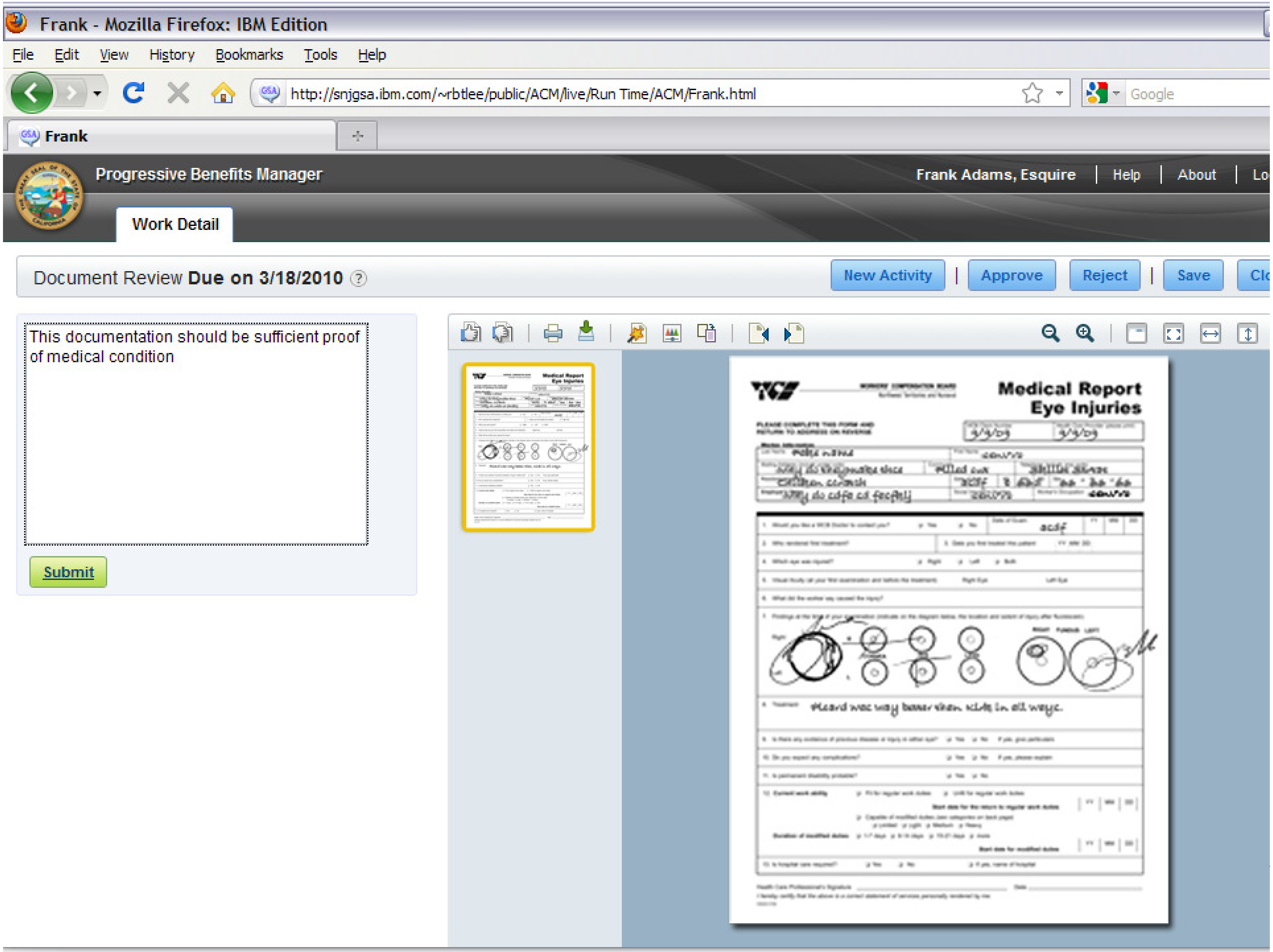
Mali Vo
Associate Legal Assistant

Vivian Birch
has just assigned a new case to you.


Frank - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/Frank.html
Google
Frank
Progressive Benefits Manager
Frank Adams, Esquire
Help
About
Lo
Work Detail
New Activity
Approve
Reject
Save
Cl
Submit

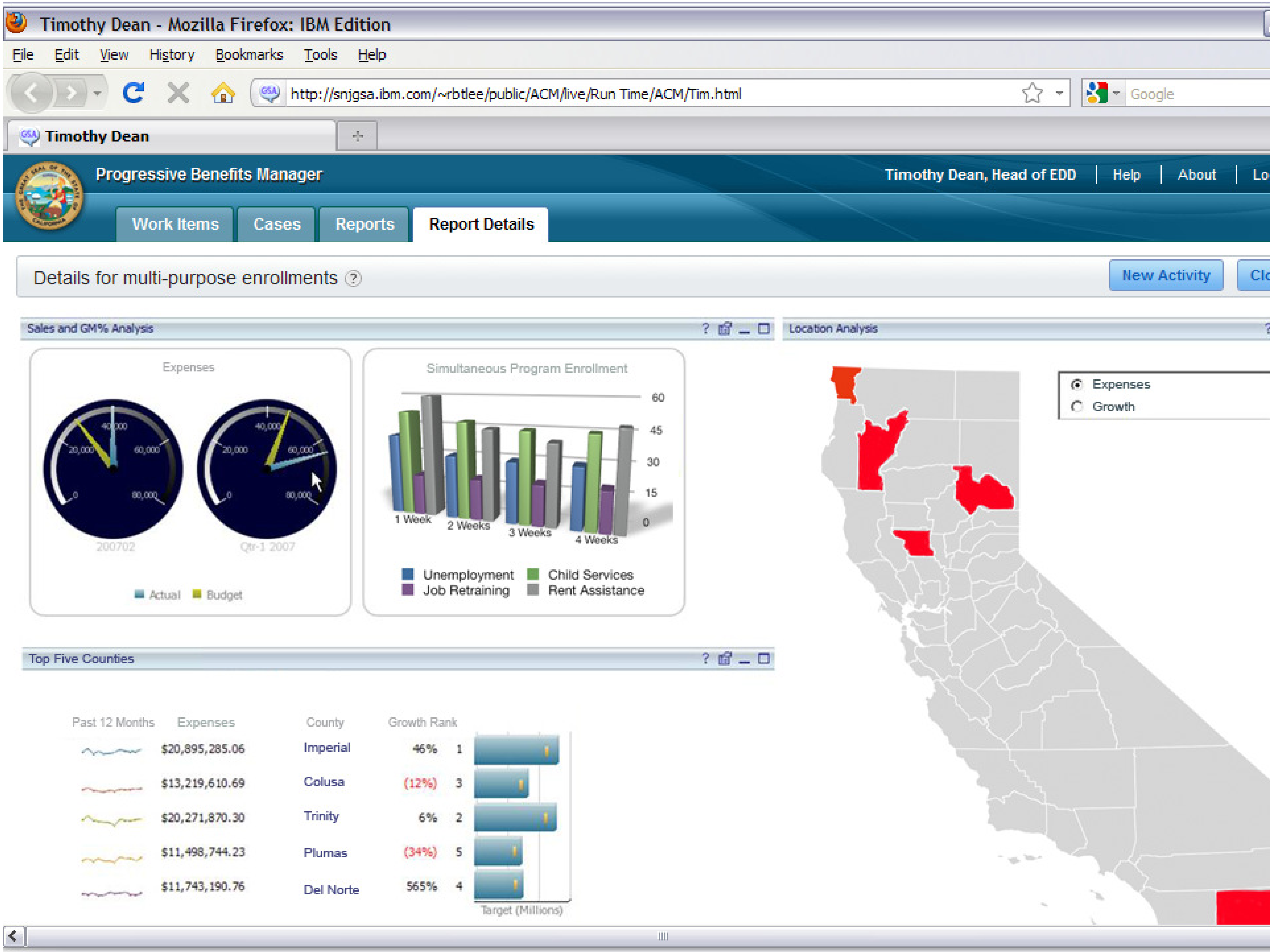
Document Review **Due on 3/18/2010**

Medical Report
Eye Injuries

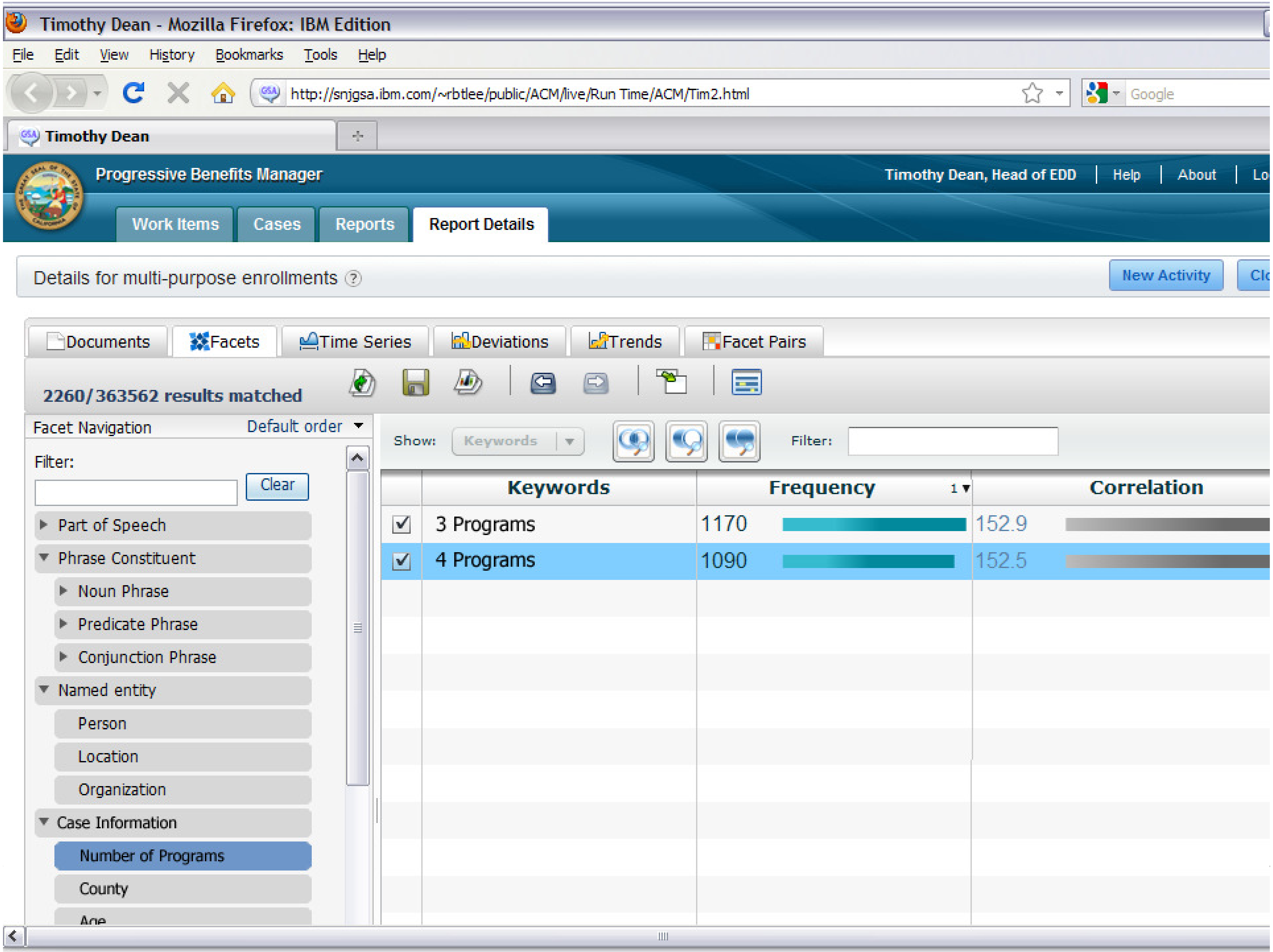

Frank - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/Frank.html
Google
Frank
Progressive Benefits Manager
Frank Adams, Esquire
Help
About
Work Detail
New Activity
Approve
Reject
Save
Submit
Medical Report
Eye Injuries

Document Review **Due on 3/18/2010**

This documentation should be sufficient proof of medical condition


Timothy Dean - Mozilla Firefox: IBM Edition
File Edit View History Bookmarks Tools Help
http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/Tim.html
Google
Timothy Dean
Progressive Benefits Manager
Timothy Dean, Head of EDD
Help
About
Work Items
Cases
Reports
Report Details
Details for multi-purpose enrollments
New Activity
Sales and GM% Analysis
Expenses
20,000
40,000
60,000
80,000
0
200702
Qtr-1 2007
Actual
Budget
Simultaneous Program Enrollment
60
45
30
15
0
1 Week
2 Weeks
3 Weeks
4 Weeks
Unemployment
Child Services
Job Retraining
Rent Assistance
Location Analysis
Expenses
Growth
Top Five Counties
Target (Millions)

Past 12 Months	Expenses	County	Growth	Rank
	$20,895,285.06	Imperial	46%	1
	$13,219,610.69	Colusa	(12%)	3
	$20,271,870.30	Trinity	6%	2
	$11,498,744.23	Plumas	(34%)	5
	$11,743,190.76	Del Norte	565%	4

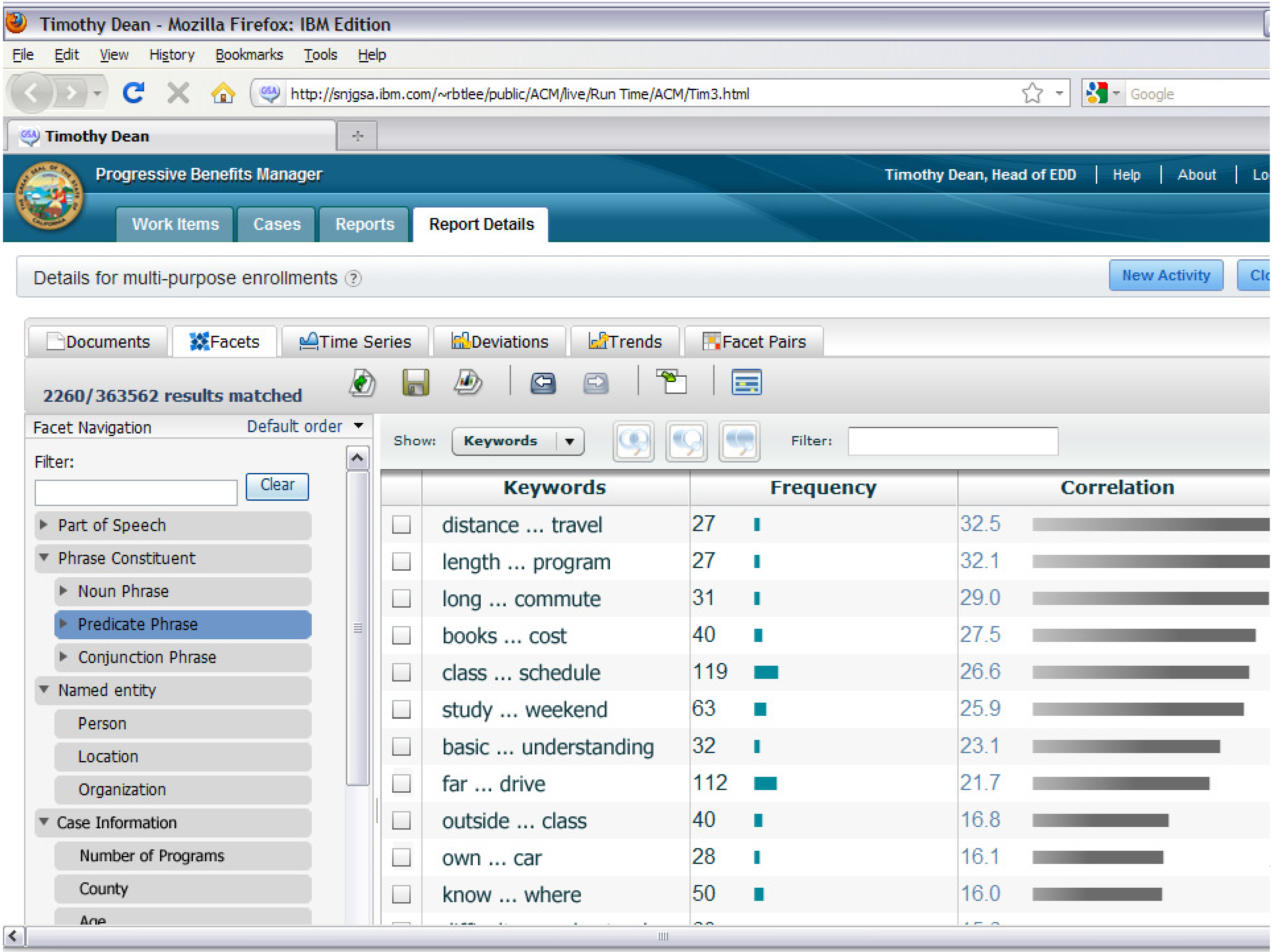

Timothy Dean - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Google
Timothy Dean
Progressive Benefits Manager
Timothy Dean, Head of EDD
Help
About
Lo
Work Items
Cases
Reports
Report Details
New Activity
Cl
Documents
Facets
Time Series
Deviations
Trends
Facet Pairs
Facet Navigation
Default order
Filter:
Clear
Part of Speech
Phrase Constituent
Noun Phrase
Predicate Phrase
Conjunction Phrase
Named entity
Person
Location
Organization
Case Information
Number of Programs
County
Age
Show:
Keywords
Filter:

http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/Tim2.html

Details for multi-purpose enrollments

2260/363562 results matched

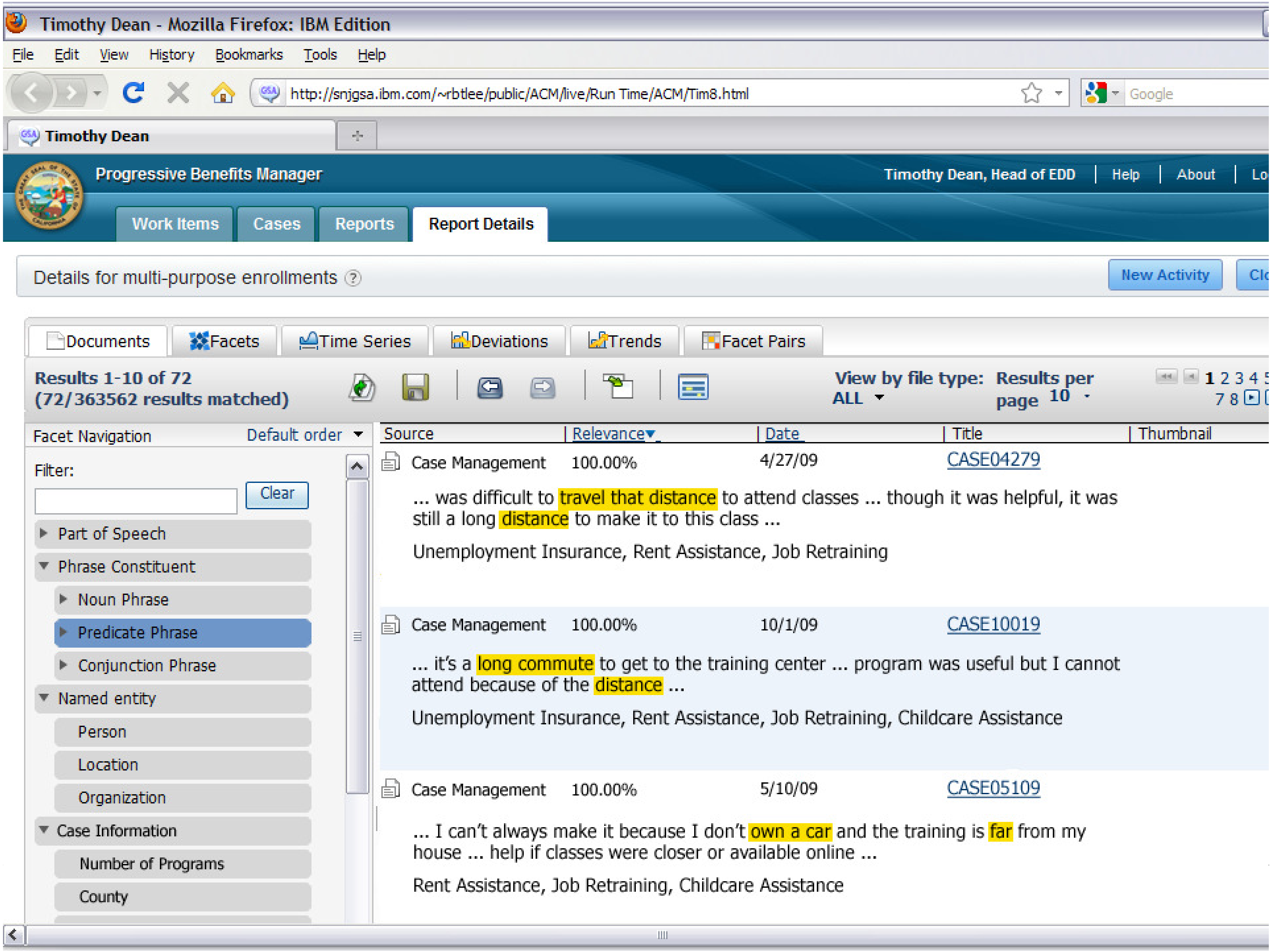
	Keywords	Frequency 1 ▾	Correlation
☑	3 Programs	1170	152.9
☑	4 Programs	1090	152.5


Timothy Dean - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/Tim3.html
Google
Timothy Dean
Progressive Benefits Manager
Timothy Dean, Head of EDD
Help
About
Work Items
Cases
Reports
Report Details
New Activity
Documents
Facets
Time Series
Deviations
Trends
Facet Pairs
Facet Navigation
Default order
Filter:
Clear
Part of Speech
Phrase Constituent
Noun Phrase
Predicate Phrase
Conjunction Phrase
Named entity
Person
Location
Organization
Case Information
Number of Programs
County
Age
Show:
Keywords
Filter:

Details for multi-purpose enrollments

2260/363562 results matched

	Keywords	Frequency	Correlation
☐	distance ... travel	27	32.5
☐	length ... program	27	32.1
☐	long ... commute	31	29.0
☐	books ... cost	40	27.5
☐	class ... schedule	119	26.6
☐	study ... weekend	63	25.9
☐	basic ... understanding	32	23.1
☐	far ... drive	112	21.7
☐	outside ... class	40	16.8
☐	own ... car	28	16.1
☐	know ... where	50	16.0


Timothy Dean - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
http://snjgsa.ibm.com/~rbtlee/public/ACM/live/Run Time/ACM/Tim8.html
Google
Timothy Dean
Progressive Benefits Manager
Timothy Dean, Head of EDD
Help
About
Work Items
Cases
Reports
Report Details
New Activity
Documents
Facets
Time Series
Deviations
Trends
Facet Pairs
View by file type: ALL
Results per page 10
1 2 3 4
7 8
Facet Navigation
Default order
Filter:
Clear
Part of Speech
Phrase Constituent
Noun Phrase
Predicate Phrase
Conjunction Phrase
Named entity
Person
Location
Organization
Case Information
Number of Programs
County
Source
Relevance
Date
Title
Thumbnail

Details for multi-purpose enrollments

Results 1-10 of 72
(72/363562 results matched)

Source	Relevance	Date	Title	Thumbnail
Case Management	100.00%	4/27/09	CASE04279	

... was difficult to travel that distance to attend classes ... though it was helpful, it was still a long distance to make it to this class ...

Unemployment Insurance, Rent Assistance, Job Retraining

Source	Relevance	Date	Title	Thumbnail
Case Management	100.00%	10/1/09	CASE10019	

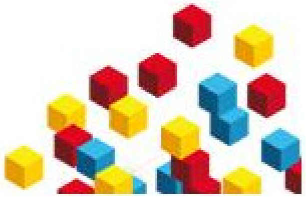
... it's a long commute to get to the training center ... program was useful but I cannot attend because of the distance ...

Unemployment Insurance, Rent Assistance, Job Retraining, Childcare Assistance

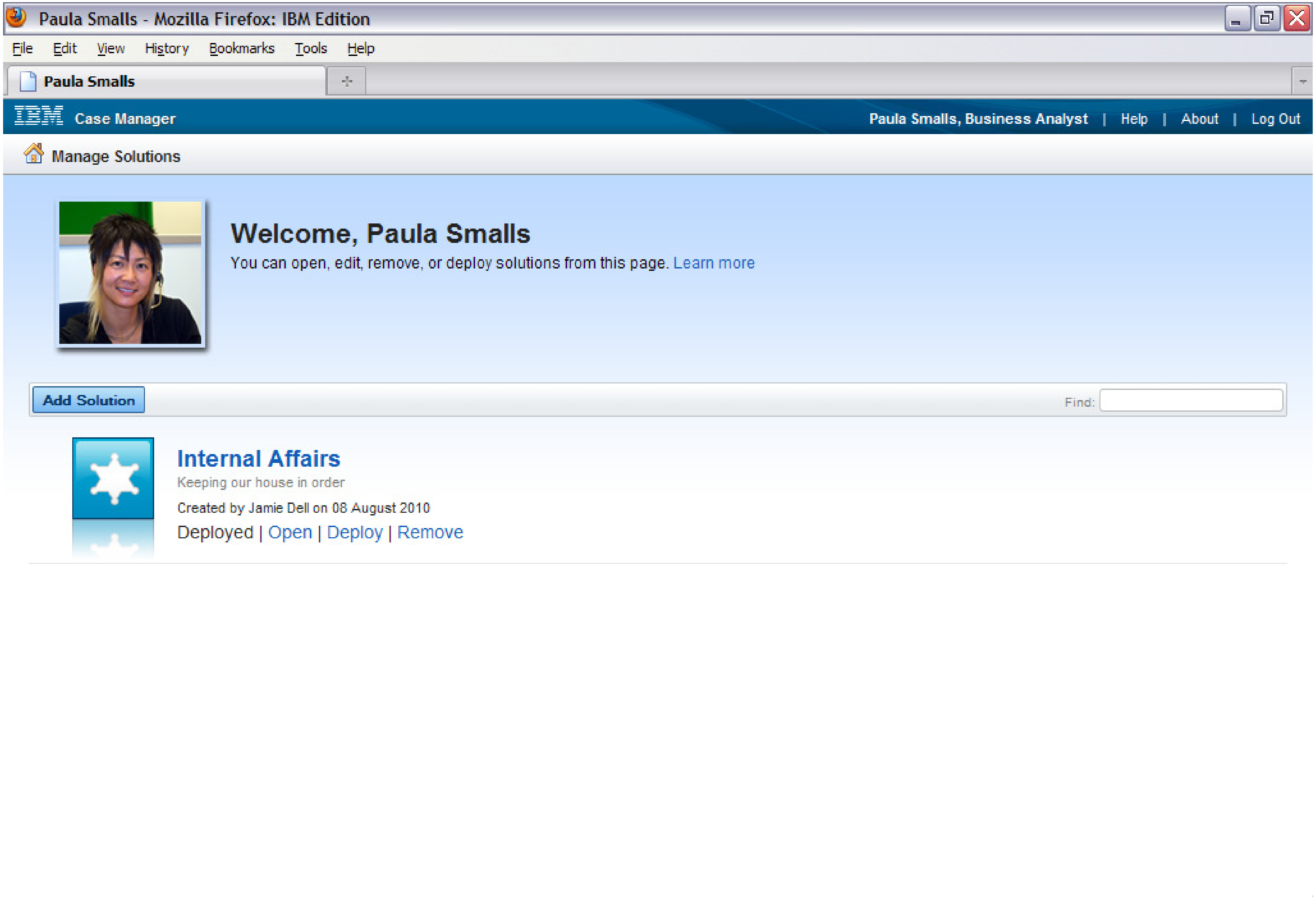
Source	Relevance	Date	Title	Thumbnail
Case Management	100.00%	5/10/09	CASE05109	

... I can't always make it because I don't own a car and the training is far from my house ... help if classes were closer or available online ...

Rent Assistance, Job Retraining, Childcare Assistance



Advanced Case Management Solution Designer Storyboard Vision


Paula Smalls - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Paula Smalls
IBM
Case Manager
Paula Smalls, Business Analyst
Help
About
Log Out
Manage Solutions
Add Solution
Find:

Welcome, Paula Smalls

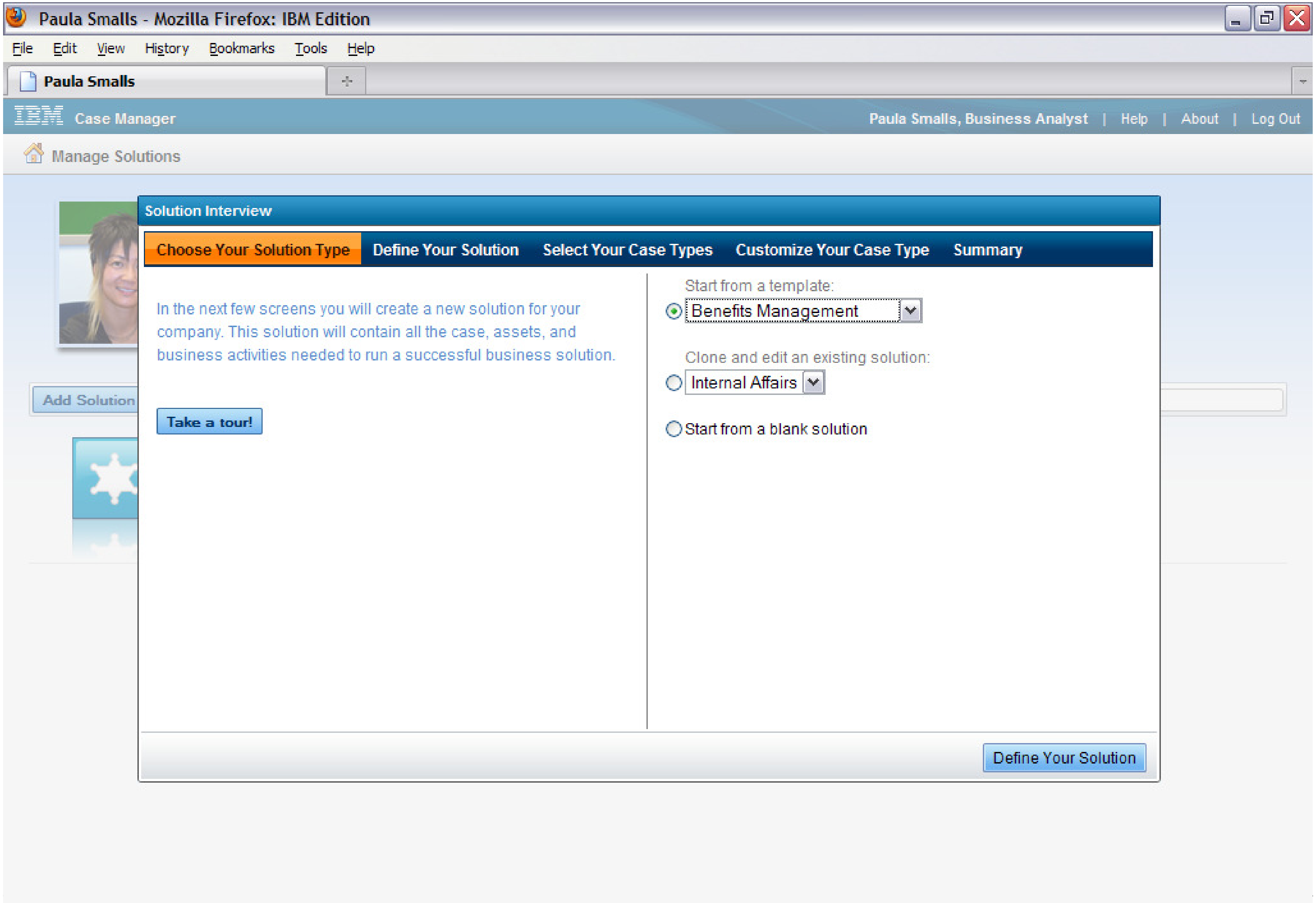
You can open, edit, remove, or deploy solutions from this page. Learn more

Internal Affairs

Keeping our house in order

Created by Jamie Dell on 08 August 2010

Deployed | Open | Deploy | Remove



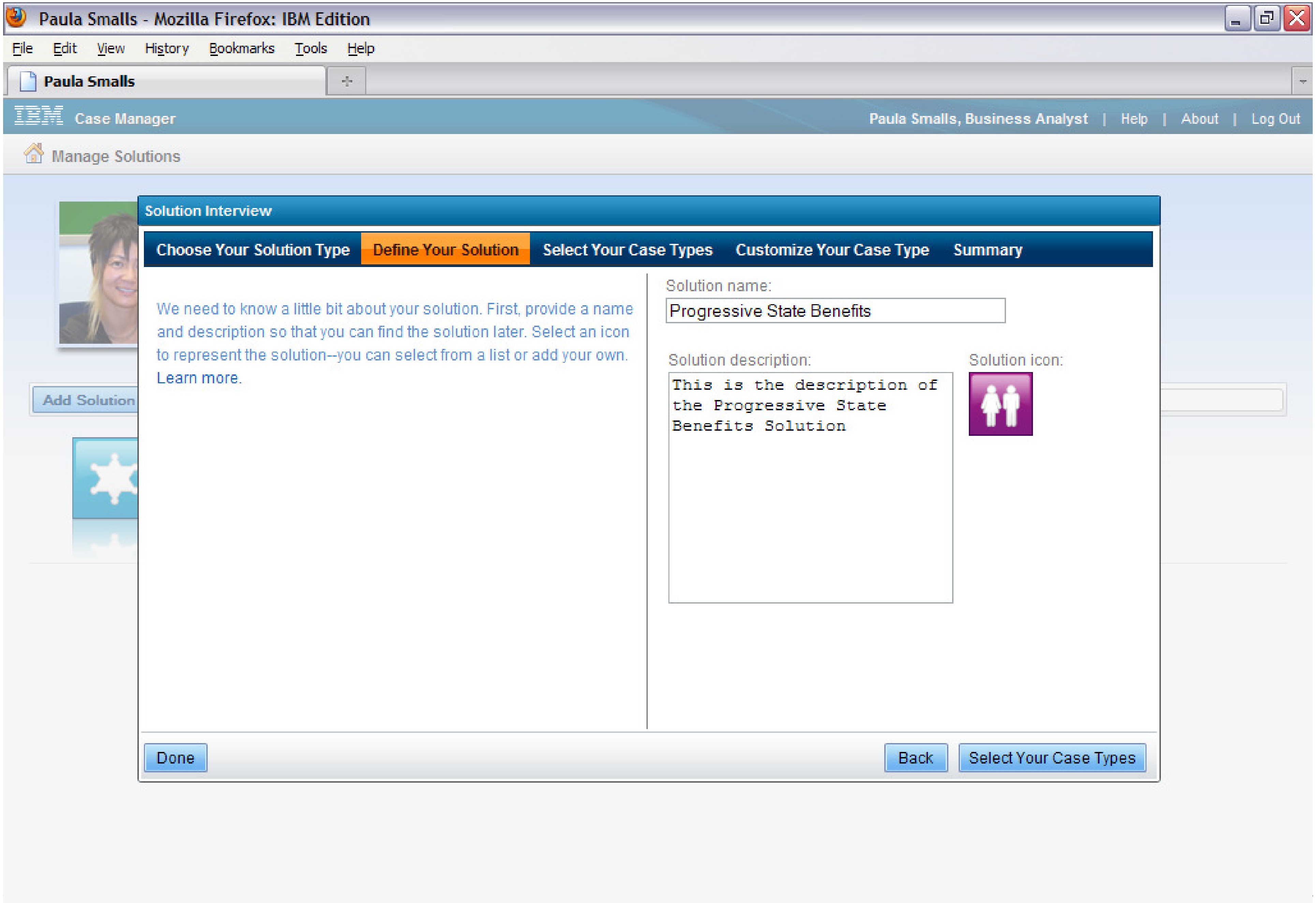
Paula Smalls - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Manage Solutions
Add Solution
Solution Interview
Choose Your Solution Type
Define Your Solution
Select Your Case Types
Customize Your Case Type
Summary
Take a tour!
Define Your Solution

In the next few screens you will create a new solution for your company. This solution will contain all the case, assets, and business activities needed to run a successful business solution.

Start from a template:
● Benefits Management

Clone and edit an existing solution:
○ Internal Affairs

○ Start from a blank solution

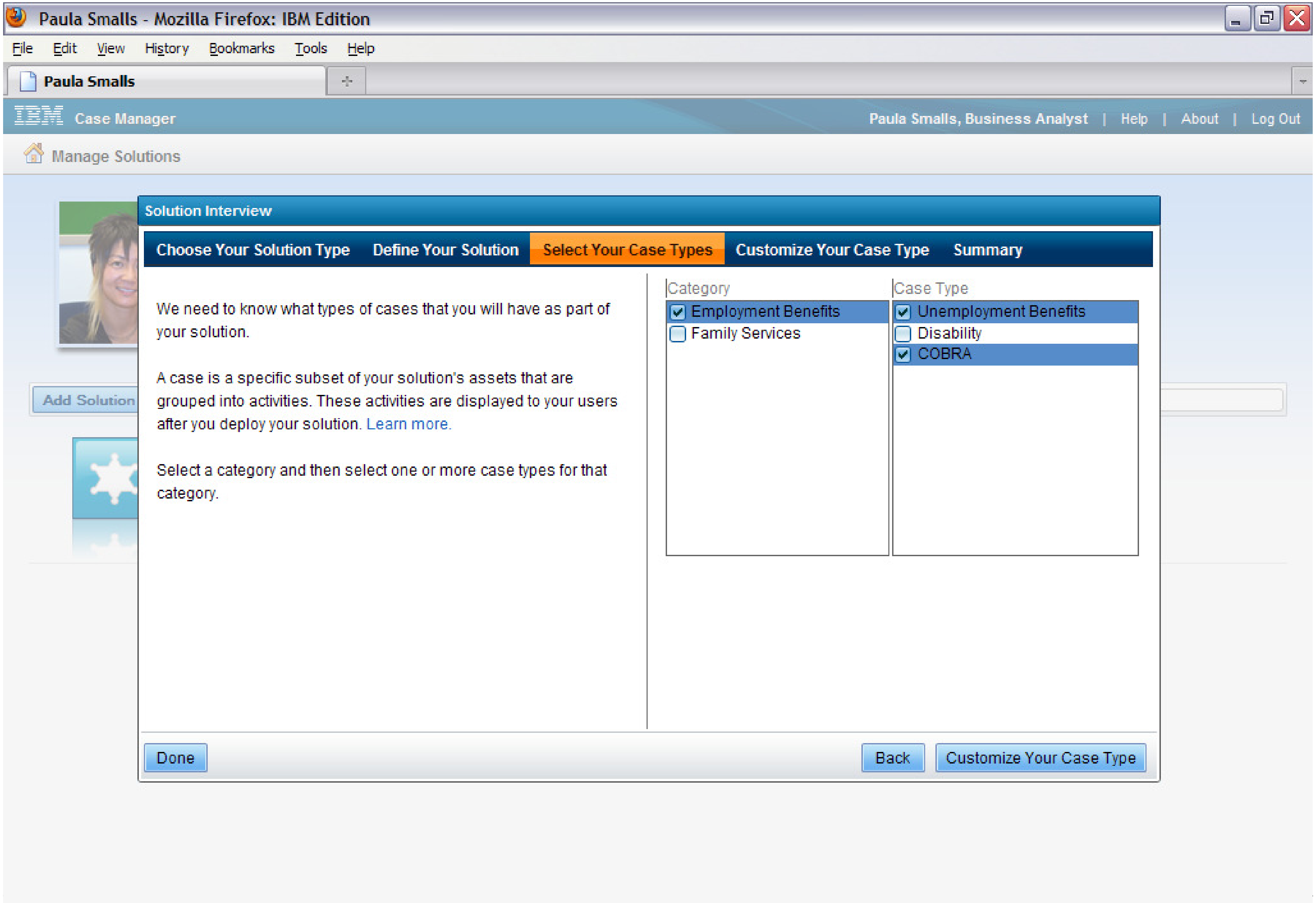

Paula Smalls - Mozilla Firefox: IBM Edition
File Edit View History Bookmarks Tools Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Manage Solutions
Add Solution
Solution Interview
Choose Your Solution Type
Define Your Solution
Select Your Case Types
Customize Your Case Type
Summary
Done
Back
Select Your Case Types

We need to know a little bit about your solution. First, provide a name and description so that you can find the solution later. Select an icon to represent the solution--you can select from a list or add your own. Learn more.

Solution name: Progressive State Benefits

Solution description: This is the description of the Progressive State Benefits Solution

Solution icon:

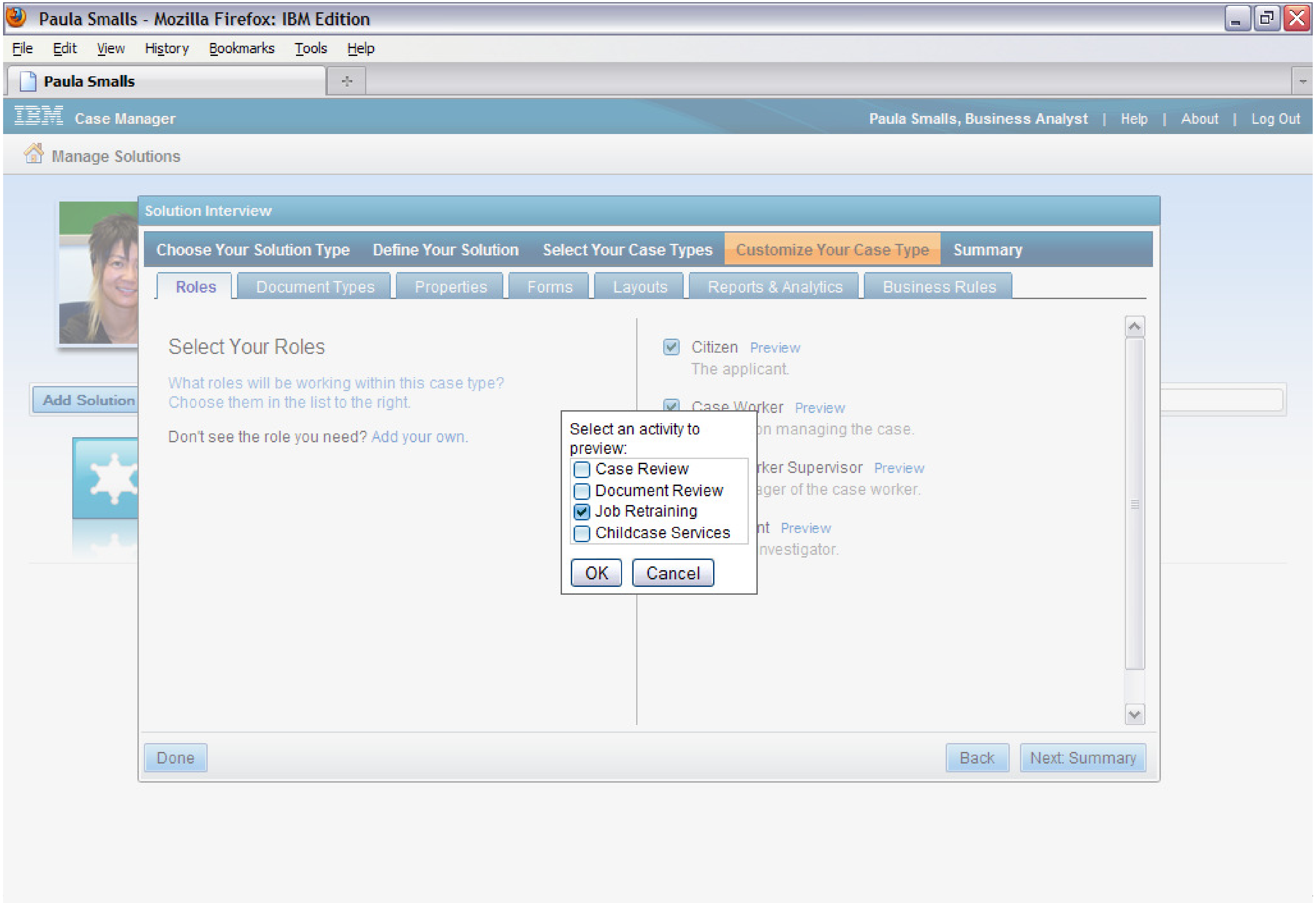

Paula Smalls - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Manage Solutions
Add Solution
Solution Interview
Choose Your Solution Type
Define Your Solution
Select Your Case Types
Customize Your Case Type
Summary
Done
Back
Customize Your Case Type

We need to know what types of cases that you will have as part of your solution.

A case is a specific subset of your solution's assets that are grouped into activities. These activities are displayed to your users after you deploy your solution. Learn more.

Select a category and then select one or more case types for that category.

Category	Case Type
☑ Employment Benefits	☑ Unemployment Benefits
☐ Family Services	☐ Disability
	☑ COBRA



Paula Smalls - Mozilla Firefox: IBM Edition
File Edit View History Bookmarks Tools Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Manage Solutions
Add Solution
Solution Interview
Choose Your Solution Type
Define Your Solution
Select Your Case Types
Customize Your Case Type
Summary
Roles
Document Types
Properties
Forms
Layouts
Reports & Analytics
Business Rules
Done
Back
Next: Summary

Select Your Roles

What roles will be working within this case type? Choose them in the list to the right.

Don't see the role you need? Add your own.

☑ Citizen Preview
The applicant.

☑ Case Worker Preview
…on managing the case.

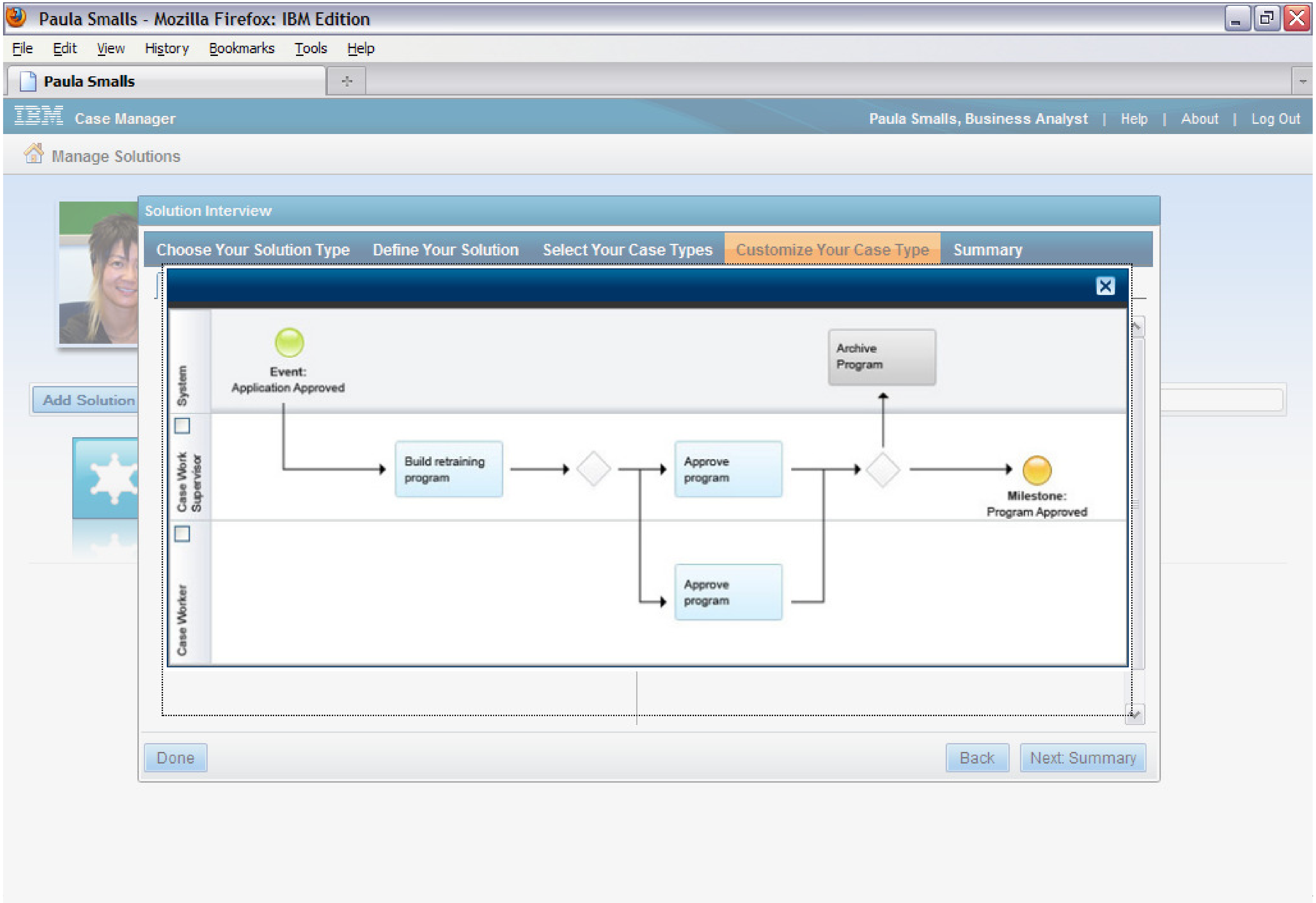
…rker Supervisor Preview
…ager of the case worker.

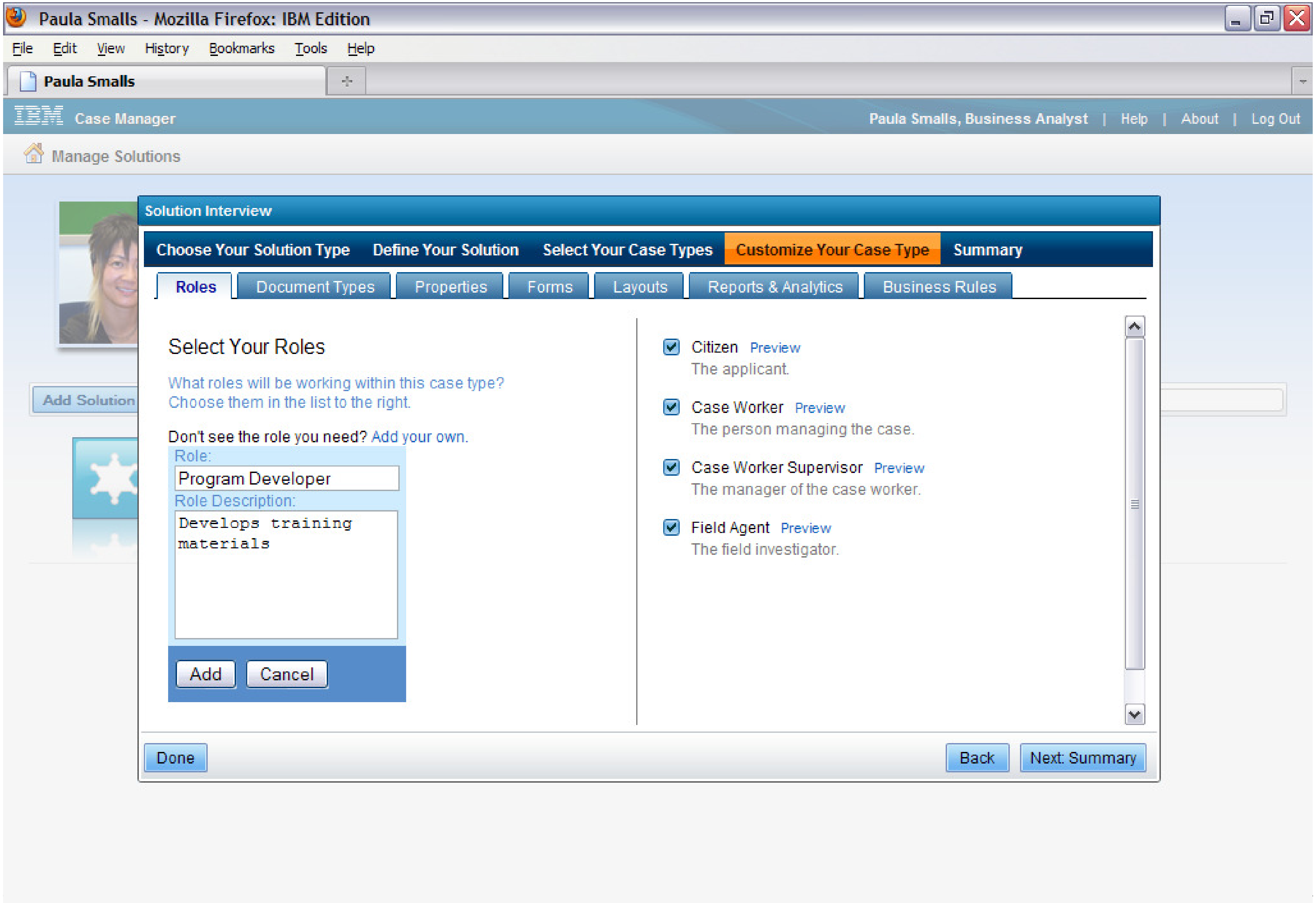
…nt Preview
…nvestigator.

Select an activity to preview:

☐ Case Review
☐ Document Review
☑ Job Retraining
☐ Childcase Services

OK Cancel


Paula Smalls - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Manage Solutions
Add Solution
Solution Interview
Choose Your Solution Type
Define Your Solution
Select Your Case Types
Customize Your Case Type
Summary
System
Case Work Supervisor
Case Worker
Event:
Application Approved
Build retraining program
Approve program
Approve program
Archive Program
Milestone:
Program Approved
Done
Back
Next: Summary


Paula Smalls - Mozilla Firefox: IBM Edition
File Edit View History Bookmarks Tools Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Manage Solutions
Add Solution
Solution Interview
Choose Your Solution Type
Define Your Solution
Select Your Case Types
Customize Your Case Type
Summary
Roles
Document Types
Properties
Forms
Layouts
Reports & Analytics
Business Rules
Add
Cancel
Done
Back
Next: Summary

Select Your Roles

What roles will be working within this case type? Choose them in the list to the right.

Don't see the role you need? Add your own.

Role: Program Developer

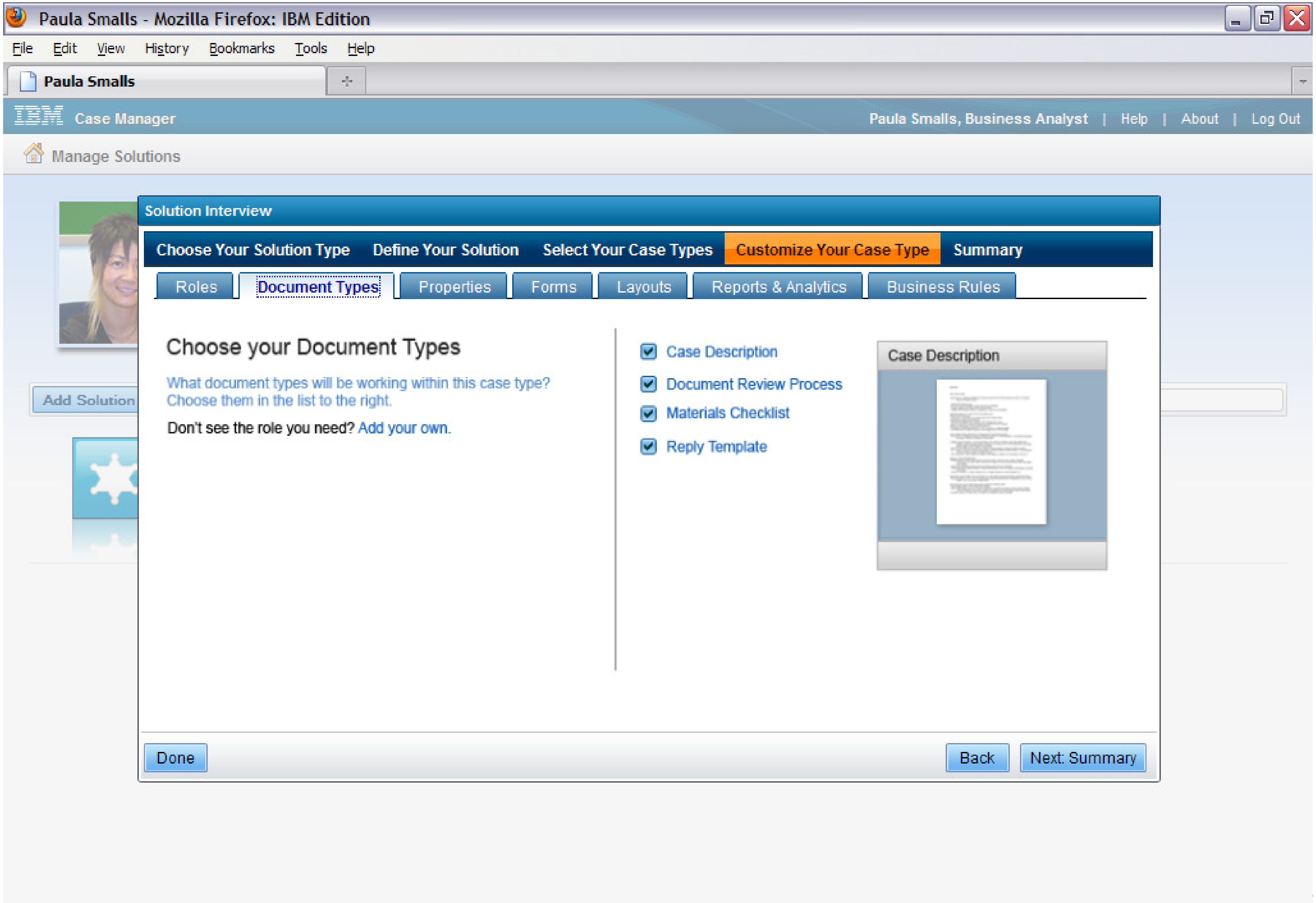
Role Description: Develops training materials

☑ Citizen Preview
The applicant.

☑ Case Worker Preview
The person managing the case.

☑ Case Worker Supervisor Preview
The manager of the case worker.

☑ Field Agent Preview
The field investigator.

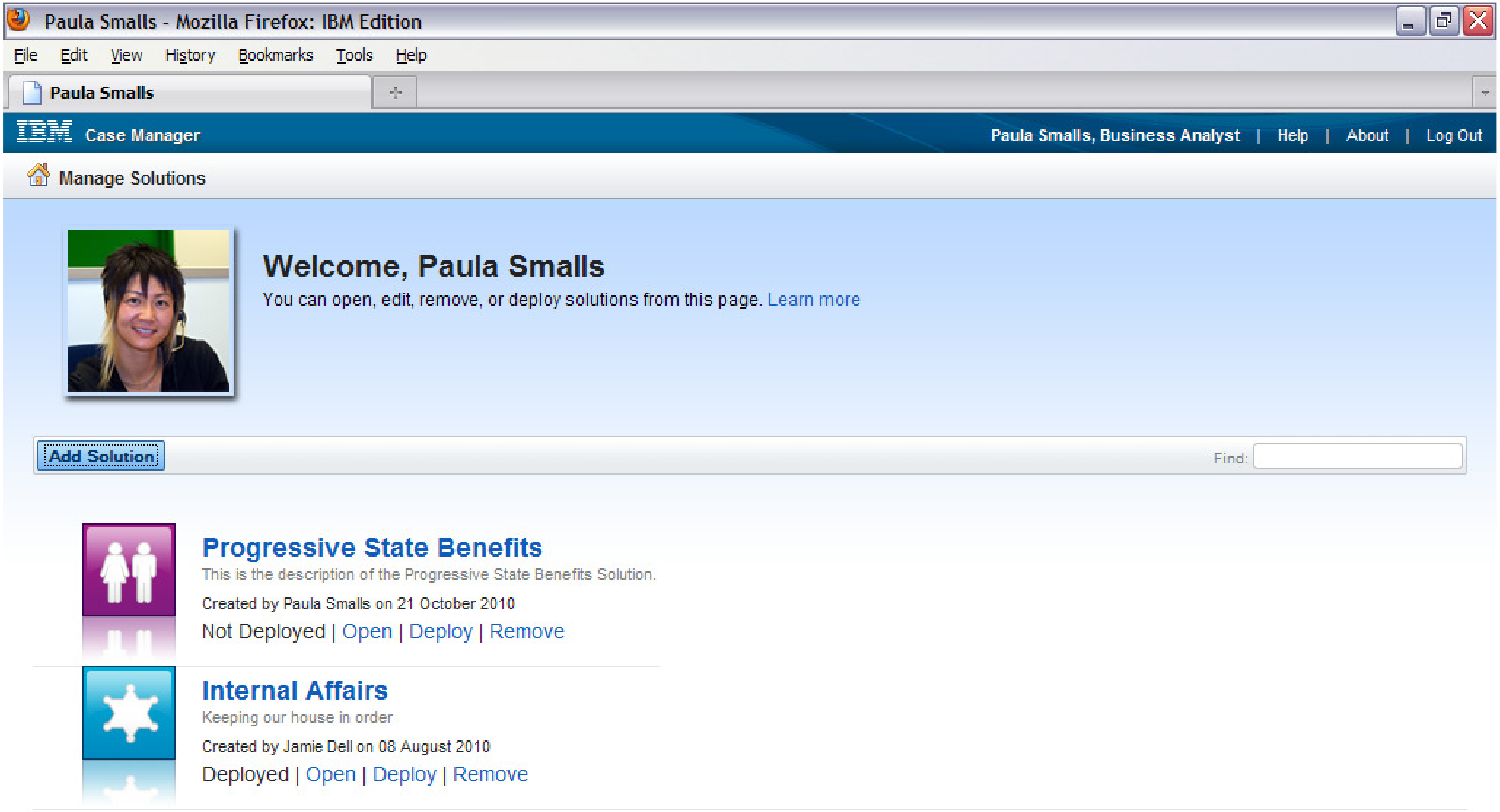

Paula Smalls - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Manage Solutions
Add Solution
Solution Interview
Choose Your Solution Type
Define Your Solution
Select Your Case Types
Customize Your Case Type
Summary
Roles
Document Types
Properties
Forms
Layouts
Reports & Analytics
Business Rules
Case Description
Done
Back
Next: Summary

Choose your Document Types

What document types will be working within this case type? Choose them in the list to the right.

Don't see the role you need? Add your own.

☑ Case Description
☑ Document Review Process
☑ Materials Checklist
☑ Reply Template


Paula Smalls - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Manage Solutions
Add Solution
Find:

Welcome, Paula Smalls

You can open, edit, remove, or deploy solutions from this page. Learn more

Progressive State Benefits

This is the description of the Progressive State Benefits Solution.

Created by Paula Smalls on 21 October 2010

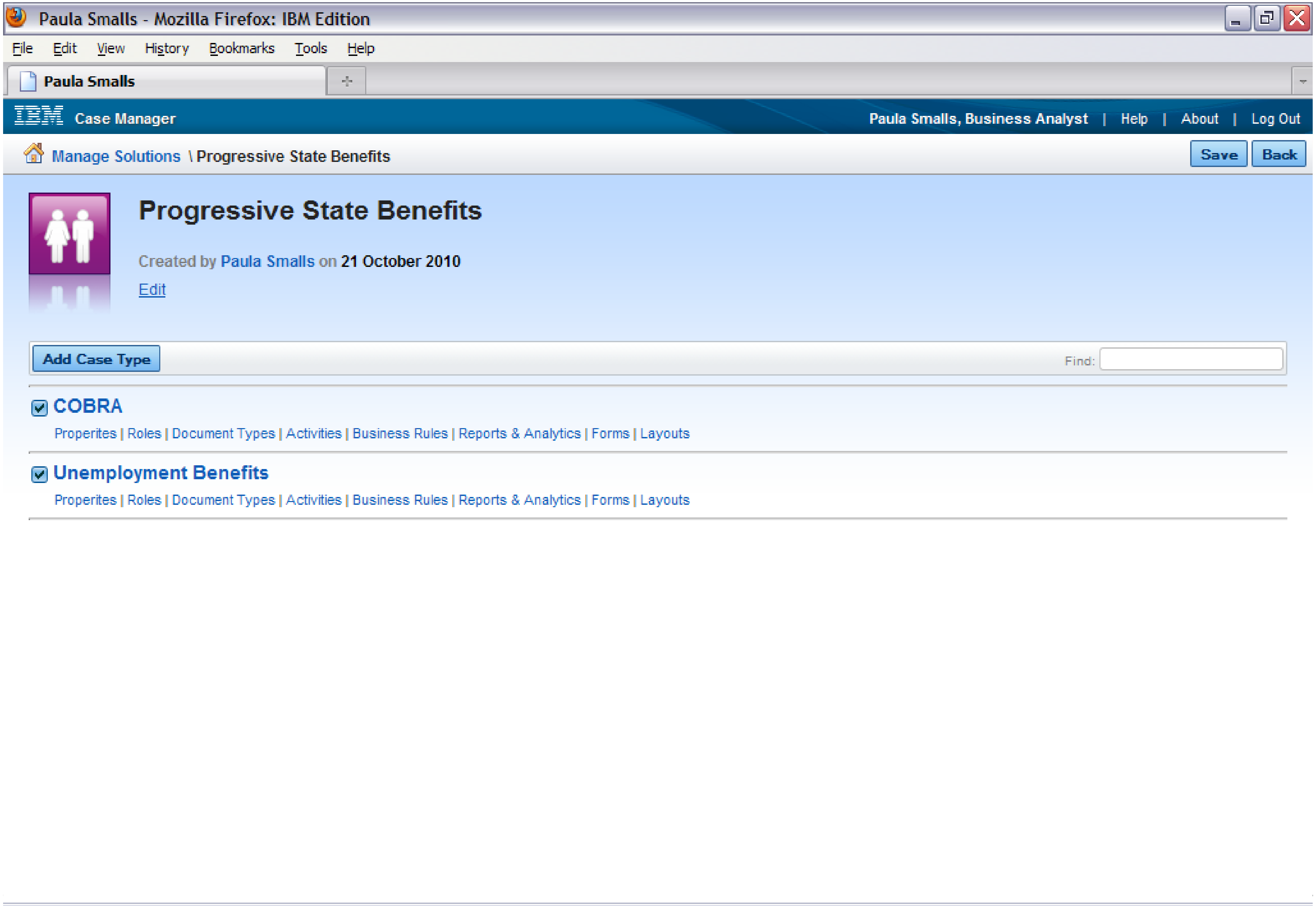
Not Deployed | Open | Deploy | Remove

Internal Affairs

Keeping our house in order

Created by Jamie Dell on 08 August 2010

Deployed | Open | Deploy | Remove


Paula Smalls - Mozilla Firefox: IBM Edition
File Edit View History Bookmarks Tools Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Manage Solutions \ Progressive State Benefits
Save
Back
Add Case Type
Find:

Progressive State Benefits

Created by Paula Smalls on 21 October 2010

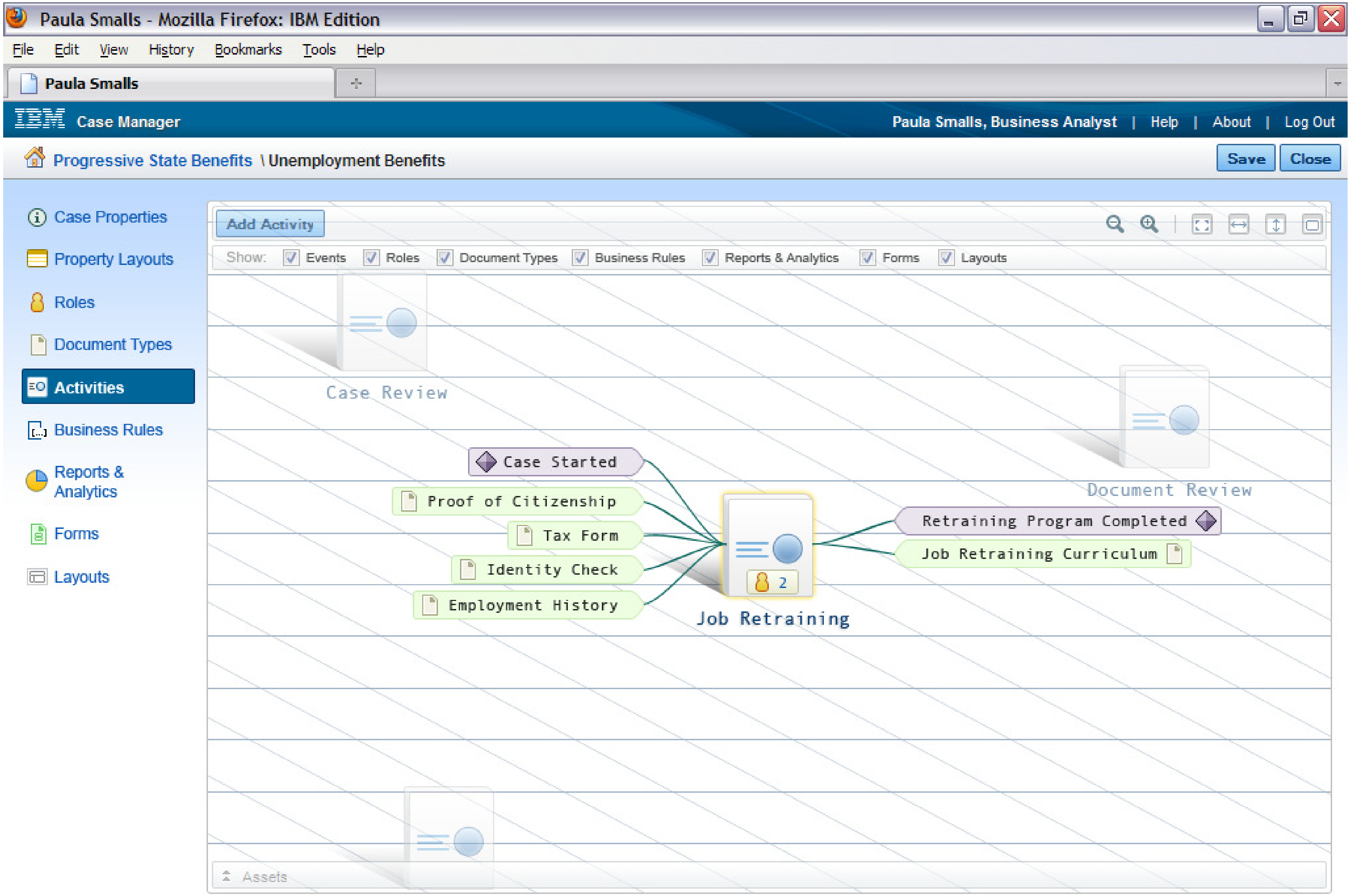
Edit

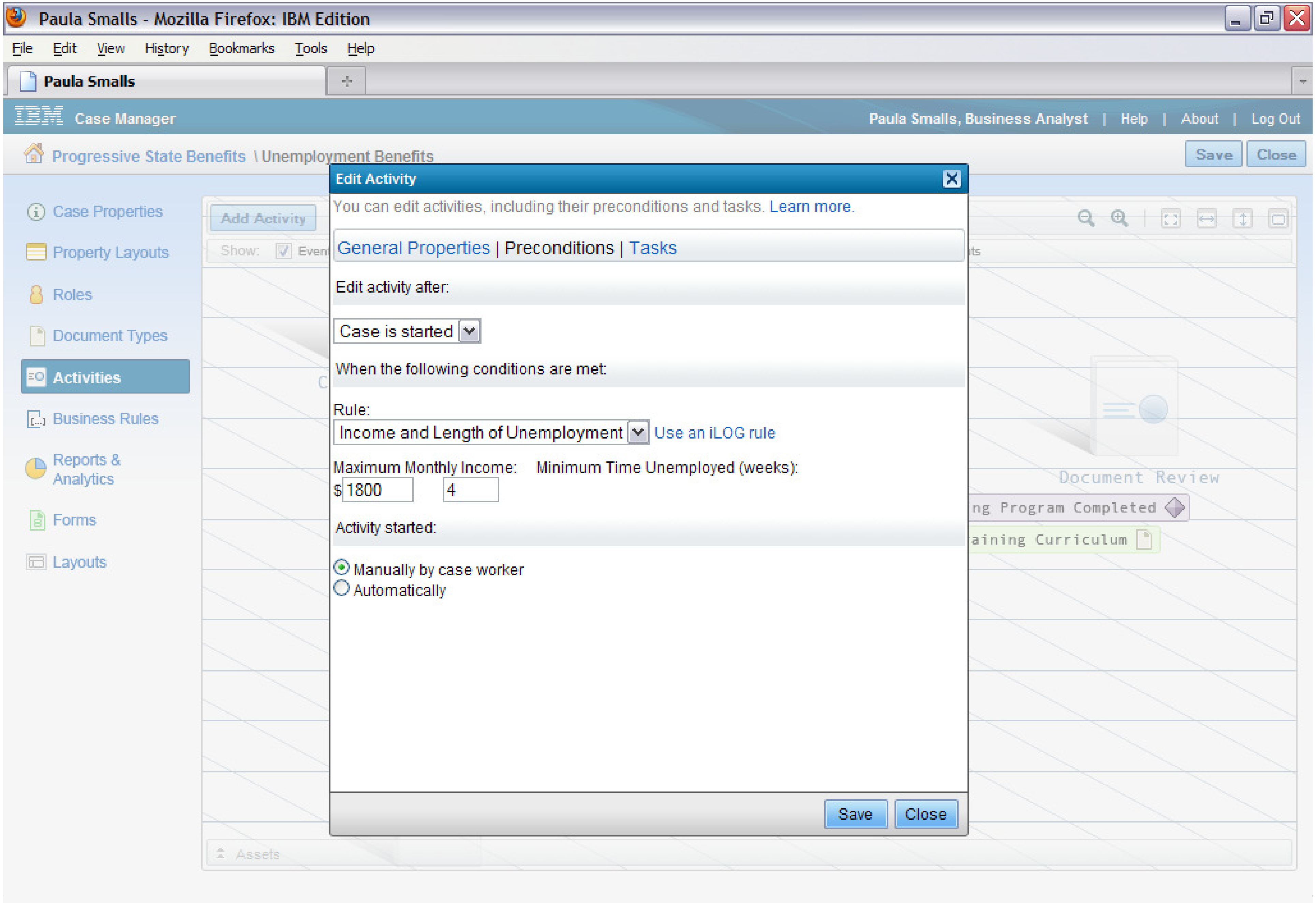
☑ **COBRA**

Properites | Roles | Document Types | Activities | Business Rules | Reports & Analytics | Forms | Layouts

☑ **Unemployment Benefits**

Properites | Roles | Document Types | Activities | Business Rules | Reports & Analytics | Forms | Layouts


Paula Smalls - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Progressive State Benefits \ Unemployment Benefits
Save
Close
Case Properties
Property Layouts
Roles
Document Types
Activities
Business Rules
Reports & Analytics
Forms
Layouts
Add Activity
Show: ☑ Events ☑ Roles ☑ Document Types ☑ Business Rules ☑ Reports & Analytics ☑ Forms ☑ Layouts
Case Review
Document Review
Case Started
Proof of Citizenship
Tax Form
Identity Check
Employment History
2
Job Retraining
Retraining Program Completed
Job Retraining Curriculum
Assets



Paula Smalls - Mozilla Firefox: IBM Edition
File Edit View History Bookmarks Tools Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Progressive State Benefits \ Unemployment Benefits
Save
Close
Case Properties
Property Layouts
Roles
Document Types
Activities
Business Rules
Reports & Analytics
Forms
Layouts
Add Activity
Show:
Document Review
Assets

Edit Activity

You can edit activities, including their preconditions and tasks. Learn more.

General Properties | Preconditions | Tasks

Edit activity after:

Case is started

When the following conditions are met:

Rule:
Income and Length of Unemployment
Use an iLOG rule

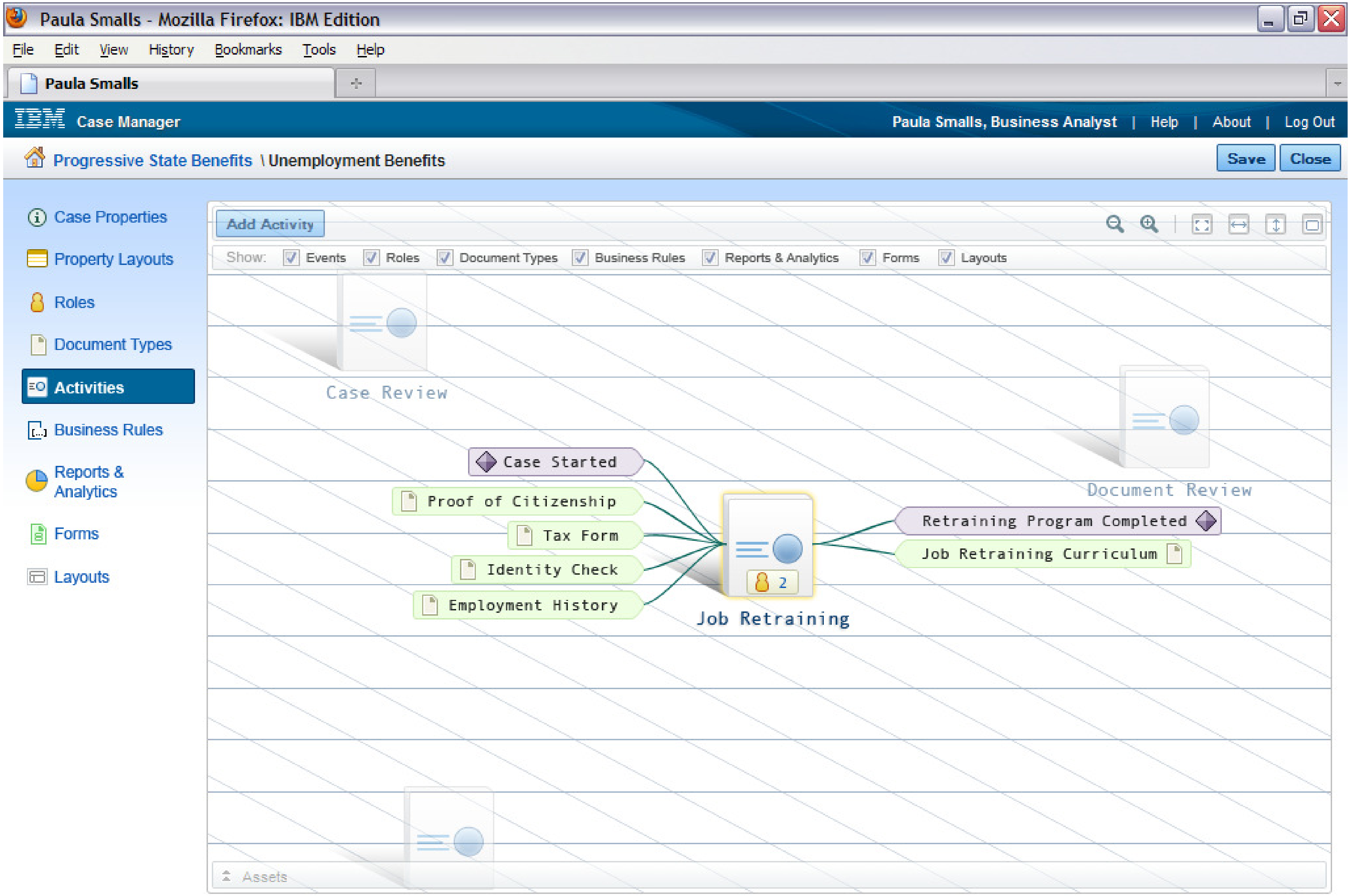
Maximum Monthly Income: $ 1800

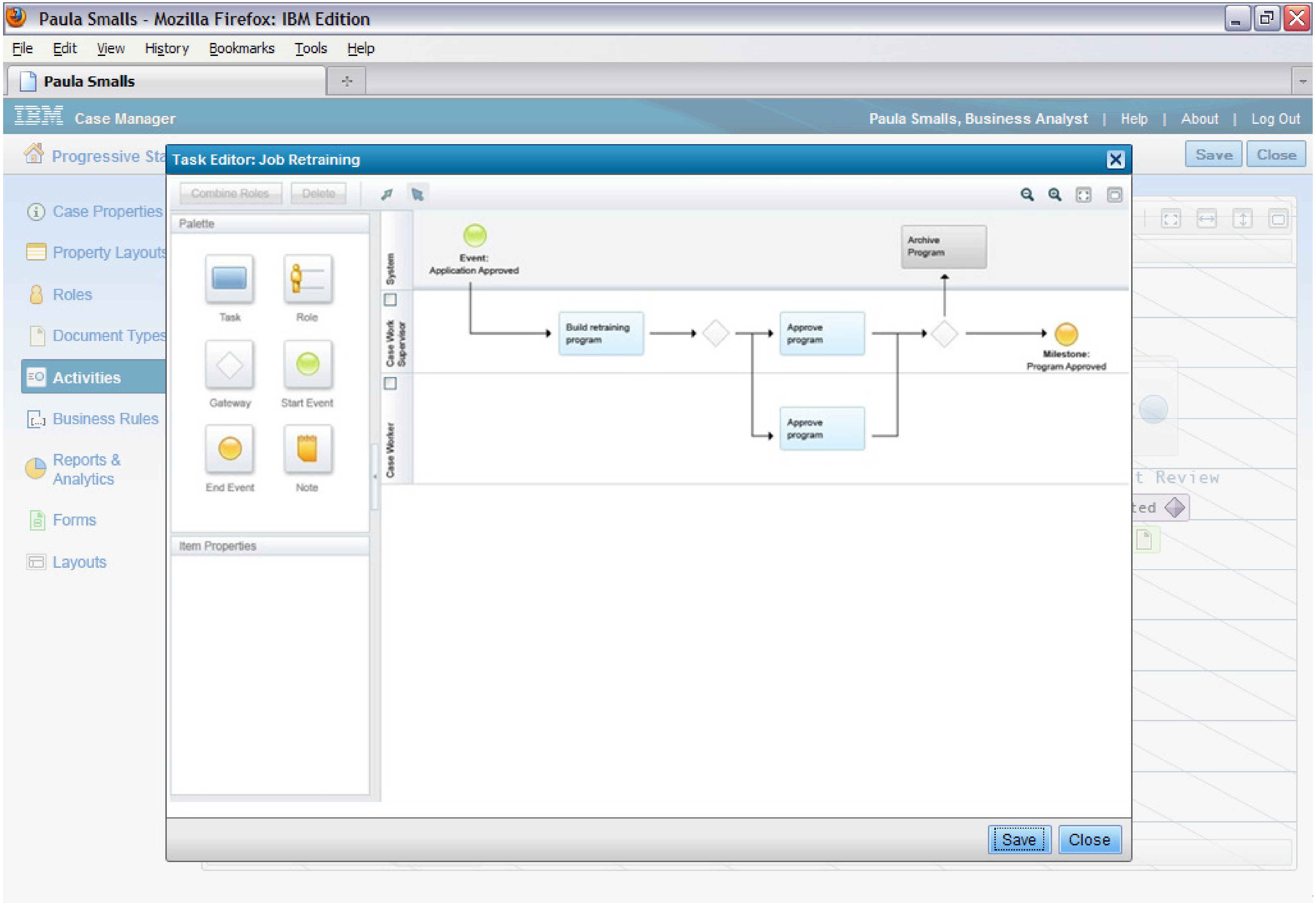
Minimum Time Unemployed (weeks): 4

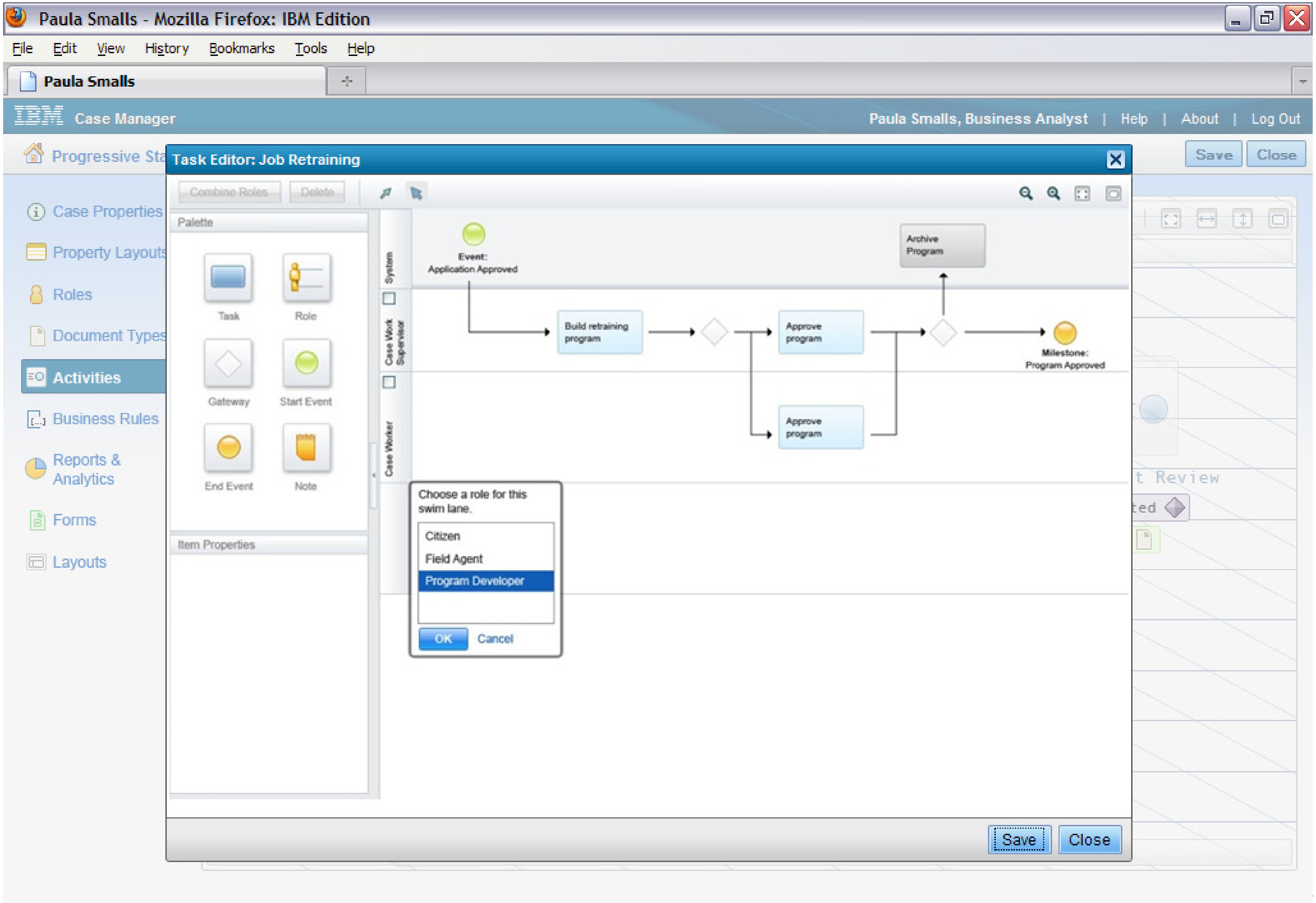
Activity started:

● Manually by case worker
○ Automatically

Save Close


Paula Smalls - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Progressive State Benefits \ Unemployment Benefits
Save
Close
Case Properties
Property Layouts
Roles
Document Types
Activities
Business Rules
Reports & Analytics
Forms
Layouts
Add Activity
Show: ☑ Events ☑ Roles ☑ Document Types ☑ Business Rules ☑ Reports & Analytics ☑ Forms ☑ Layouts
Case Review
Document Review
Case Started
Proof of Citizenship
Tax Form
Identity Check
Employment History
2
Job Retraining
Retraining Program Completed
Job Retraining Curriculum
Assets

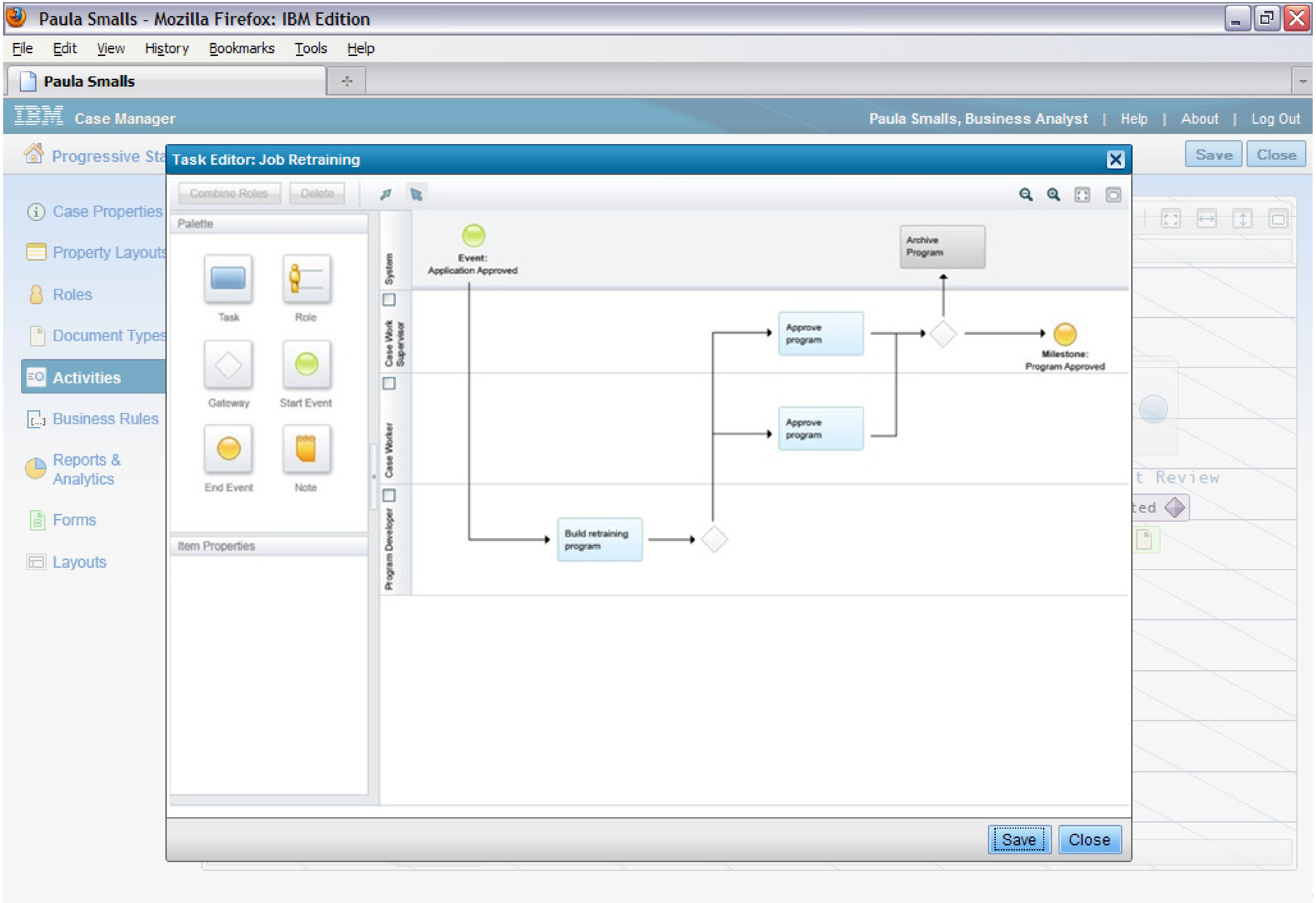

Paula Smalls - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Progressive Sta
Save
Close
Case Properties
Property Layouts
Roles
Document Types
Activities
Business Rules
Reports & Analytics
Forms
Layouts
Task Editor: Job Retraining
Combine Roles
Delete
Palette
Task
Role
Gateway
Start Event
End Event
Note
Item Properties
System
Case Work Supervisor
Case Worker
Event: Application Approved
Archive Program
Build retraining program
Approve program
Approve program
Milestone: Program Approved
t Review
ted
Save
Close

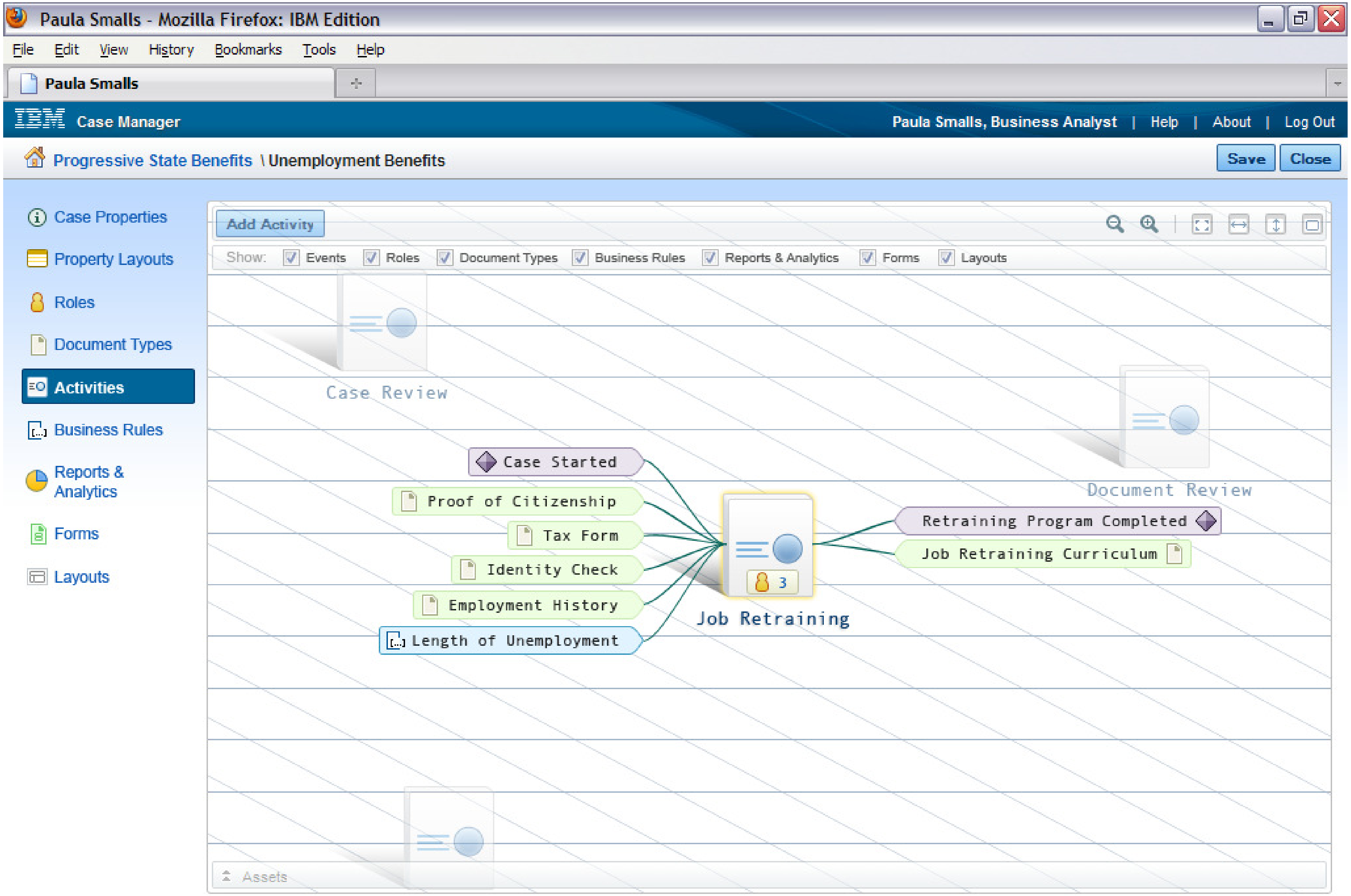

Paula Smalls - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Progressive Sta
Save
Close
Case Properties
Property Layouts
Roles
Document Types
Activities
Business Rules
Reports & Analytics
Forms
Layouts
Task Editor: Job Retraining
Combine Roles
Delete
Palette
Task
Role
Gateway
Start Event
End Event
Note
Item Properties
System
Case Work Supervisor
Case Worker
Event: Application Approved
Build retraining program
Approve program
Approve program
Archive Program
Milestone: Program Approved
t Review
ted
Save
Close

Choose a role for this swim lane.

- Citizen
- Field Agent
- **Program Developer** (selected)

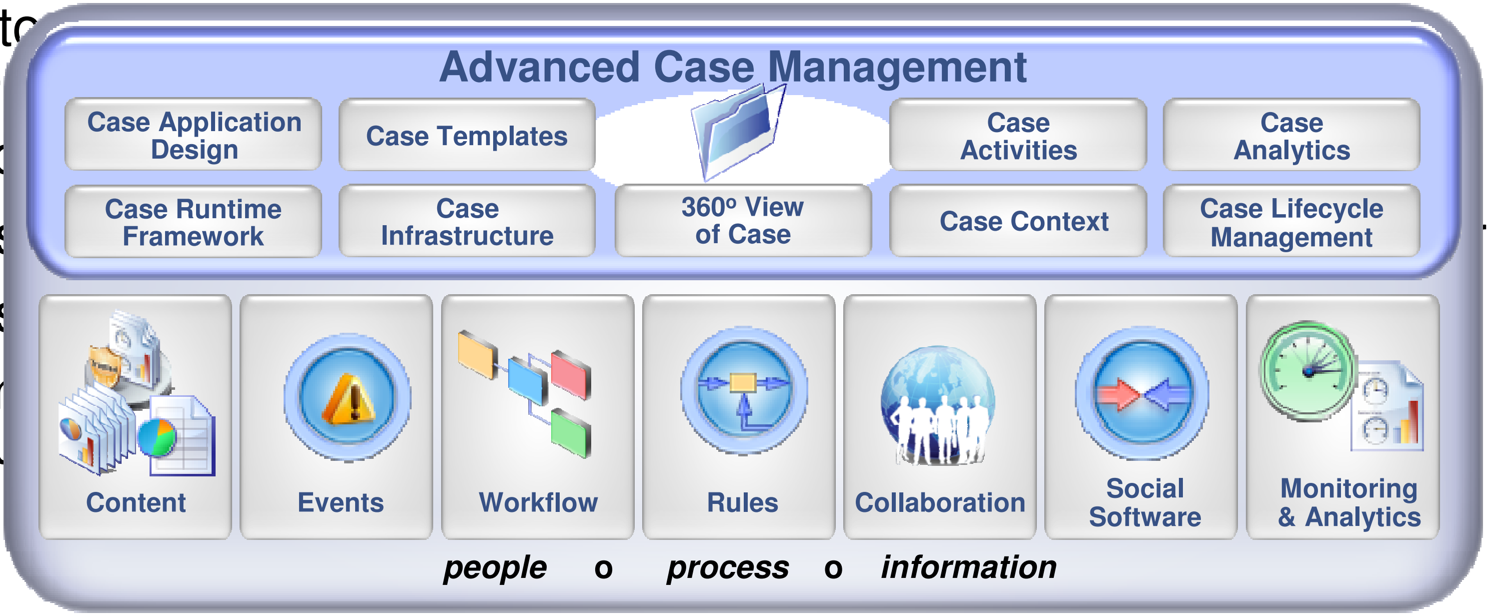
OK
Cancel


Paula Smalls - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Progressive Sta
Save
Close
Case Properties
Property Layouts
Roles
Document Types
Activities
Business Rules
Reports & Analytics
Forms
Layouts
Task Editor: Job Retraining
Combine Roles
Delete
Palette
Task
Role
Gateway
Start Event
End Event
Note
Item Properties
System
Case Work Supervisor
Case Worker
Program Developer
Event: Application Approved
Archive Program
Approve program
Approve program
Milestone: Program Approved
Build retraining program
t Review
ted
Save
Close


Paula Smalls - Mozilla Firefox: IBM Edition
File
Edit
View
History
Bookmarks
Tools
Help
Paula Smalls
IBM Case Manager
Paula Smalls, Business Analyst | Help | About | Log Out
Progressive State Benefits \ Unemployment Benefits
Save
Close
Case Properties
Property Layouts
Roles
Document Types
Activities
Business Rules
Reports & Analytics
Forms
Layouts
Add Activity
Show: ☑ Events ☑ Roles ☑ Document Types ☑ Business Rules ☑ Reports & Analytics ☑ Forms ☑ Layouts
Case Review
Document Review
Case Started
Proof of Citizenship
Tax Form
Identity Check
Employment History
Length of Unemployment
3
Job Retraining
Retraining Program Completed
Job Retraining Curriculum
Assets

Resumen: Estrategia de IBM en el área de ACM

- Alinear contenidos, procesos y usuarios
- Construir una solución optimizada, combinando moto
  her
  y so
- Ges ada
- Ges
- Cor
  solu



Advanced Case Management

Case Application Design

Case Templates

Case Activities

Case Analytics

Case Runtime Framework

Case Infrastructure

360º View of Case

Case Context

Case Lifecycle Management

Content

Events

Workflow

Rules

Collaboration

Social Software

Monitoring & Analytics

people o *process* o *information*

fizquierdo@es.ibm.com