

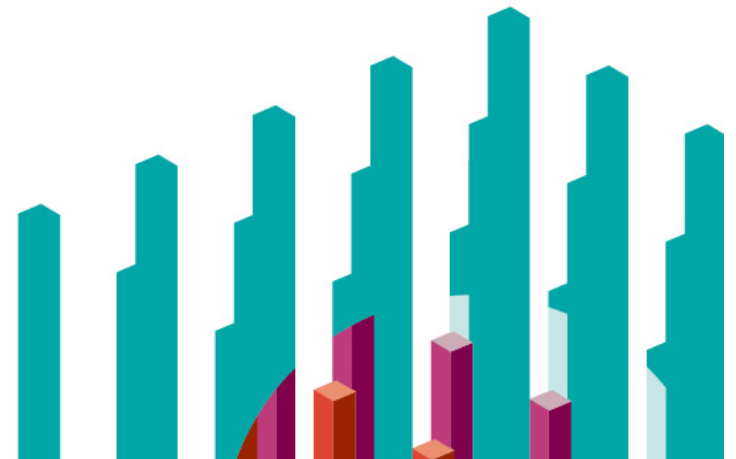


Marco Bonasoro

Case Management

IBM Enterprise Content Management

Contenuti al centro per decisioni più intelligenti



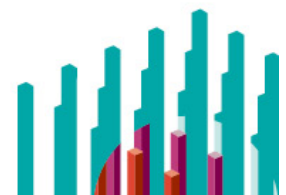


Ogni settore tratta “casi” specifici...

...tuttavia il concetto e definizione di “caso” variano sensibilmente

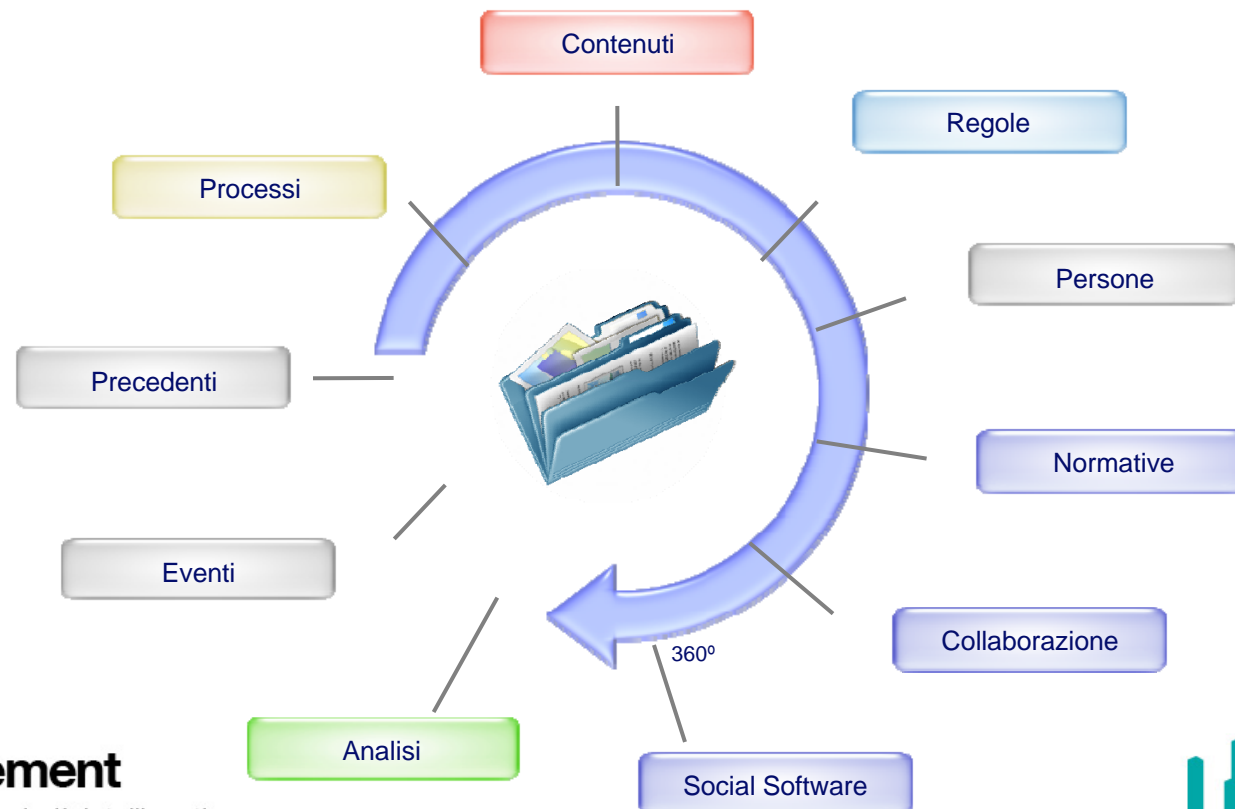


Assicurazioni	Banche	Retail	Sanitario	PA	Energia
<ul style="list-style-type: none">•Indennizzo•Polizza•Premio	<ul style="list-style-type: none">•Prestito•Mutuo•Conto•Carta di Credito•Investimento	<ul style="list-style-type: none">•Servizi al cliente•Introduzione nuovi prodotti	<ul style="list-style-type: none">•Cartella sanitaria	<ul style="list-style-type: none">•Contribuente•Concessione•Cittadino•Prestazione sociale	<ul style="list-style-type: none">•Permesso•Proprietà•Appezzamento
Condivisi	Fattura, Contratto, Dipendente, Fornitore, Cliente, Progetto...				



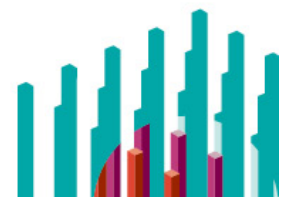
Elementi di un caso

- Un caso dovrebbe contenere le informazioni, scambi messaggi, attività, regole, processi ed eventi necessari per il suo completamento...
- La cartella associata al caso accorpa tutte le risorse necessarie all'avanzamento del processo, che vengono gestite come un'insieme correlato di informazioni durante l'intero ciclo di vita del caso.



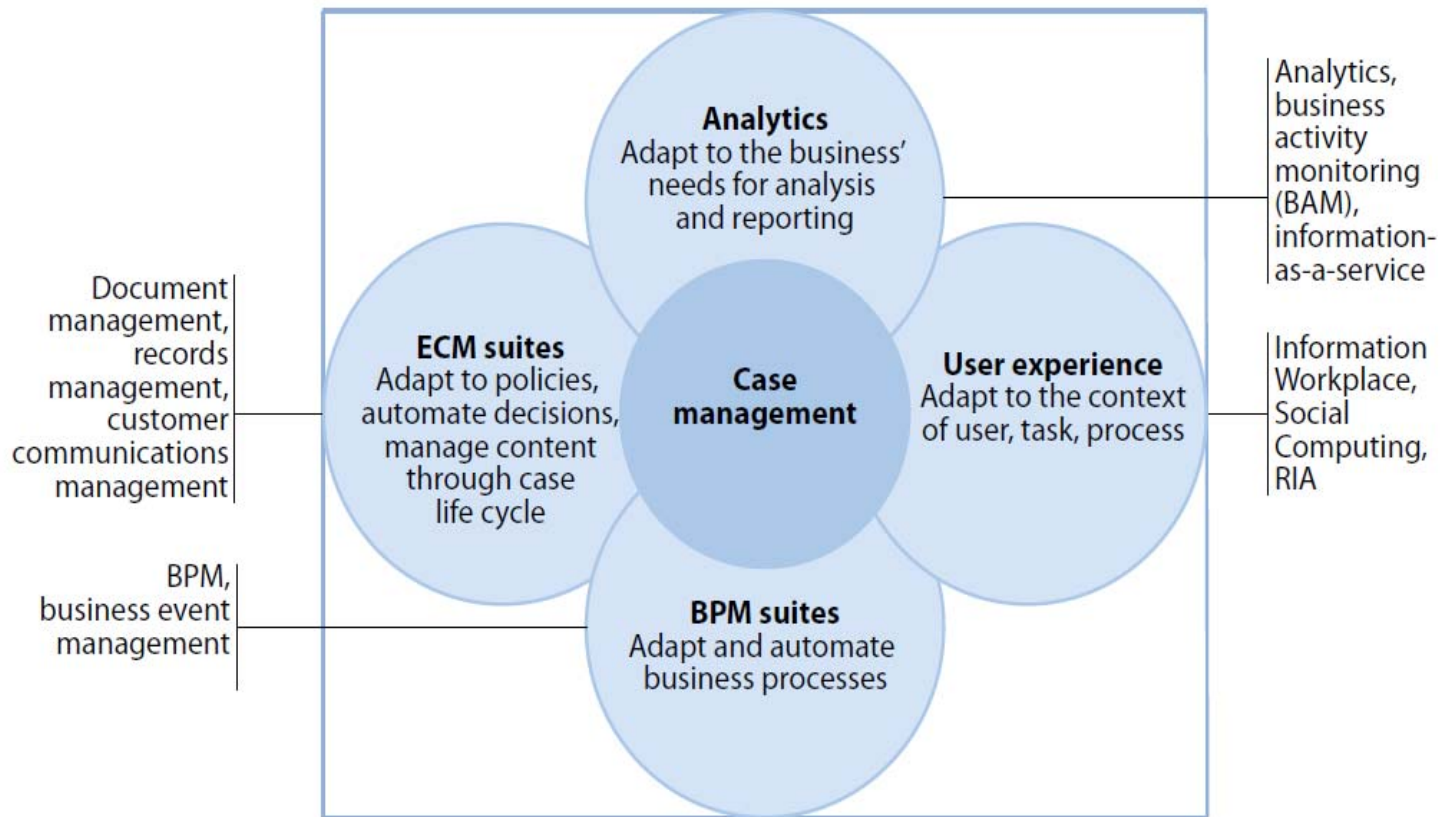
Applicazioni target

- Quelle imperniate su un oggetto complesso (“caso” o pratica) e con caratteristiche:
 - Knowledge-intensive
 - Non del tutto predicibili a priori
 - Team-based (multiple views)
- Per supportare tali applicazioni, una soluzione di Case Management richiede la disponibilità di alcuni servizi essenziali:
 - ECM
 - BPM
 - Collaboration
 - Analytics



Cosa dicono gli analisti

Figure 1 Case Management Combines ECM, BPMS, And Analytics With User Experience Advances

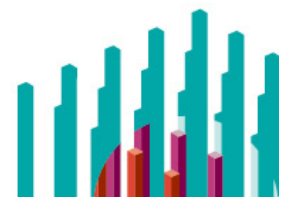


55755

Source: Forrester Research, Inc.

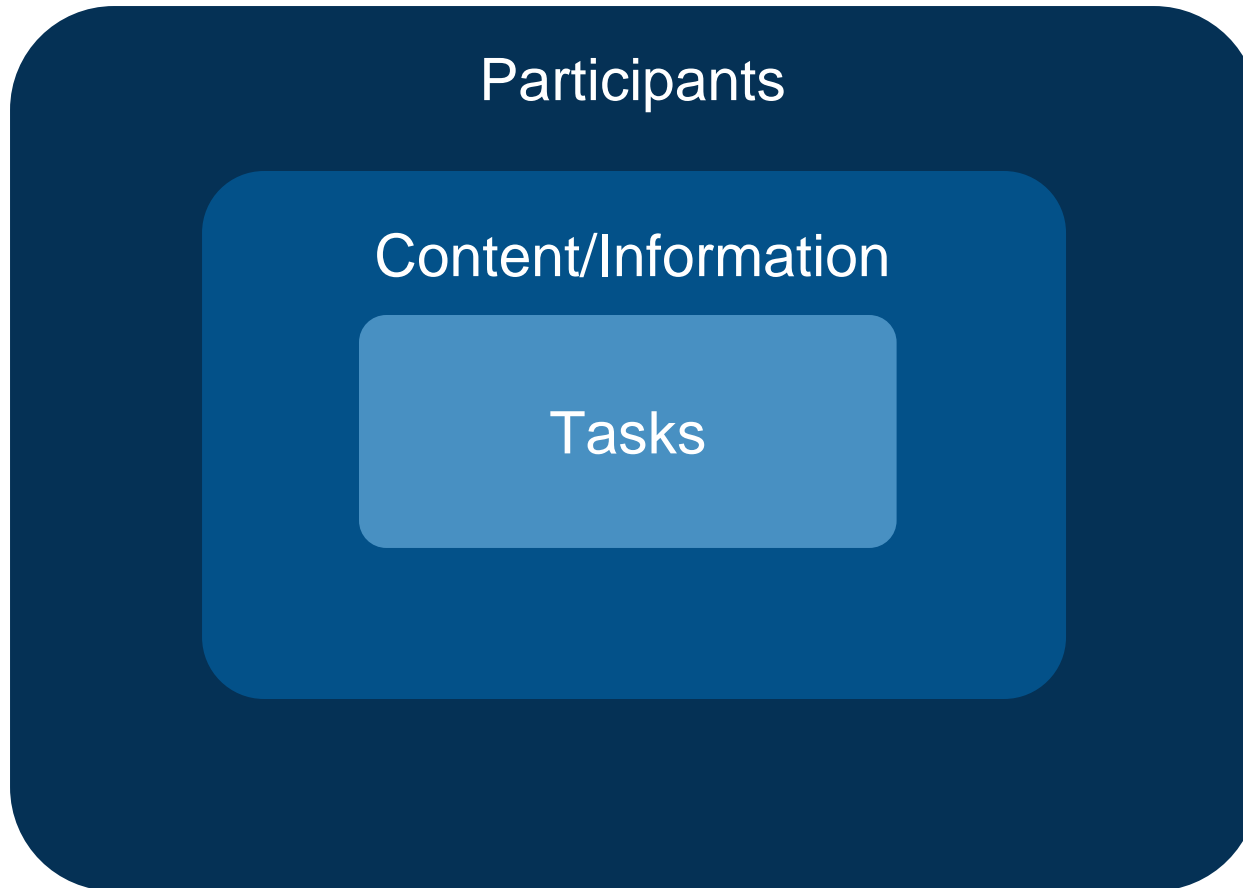
IBM Enterprise Content Management

Contenuti al centro per decisioni più intelligenti.



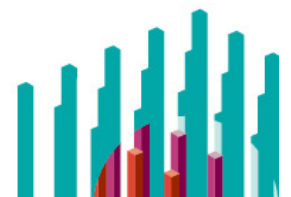


BPM tradizionale



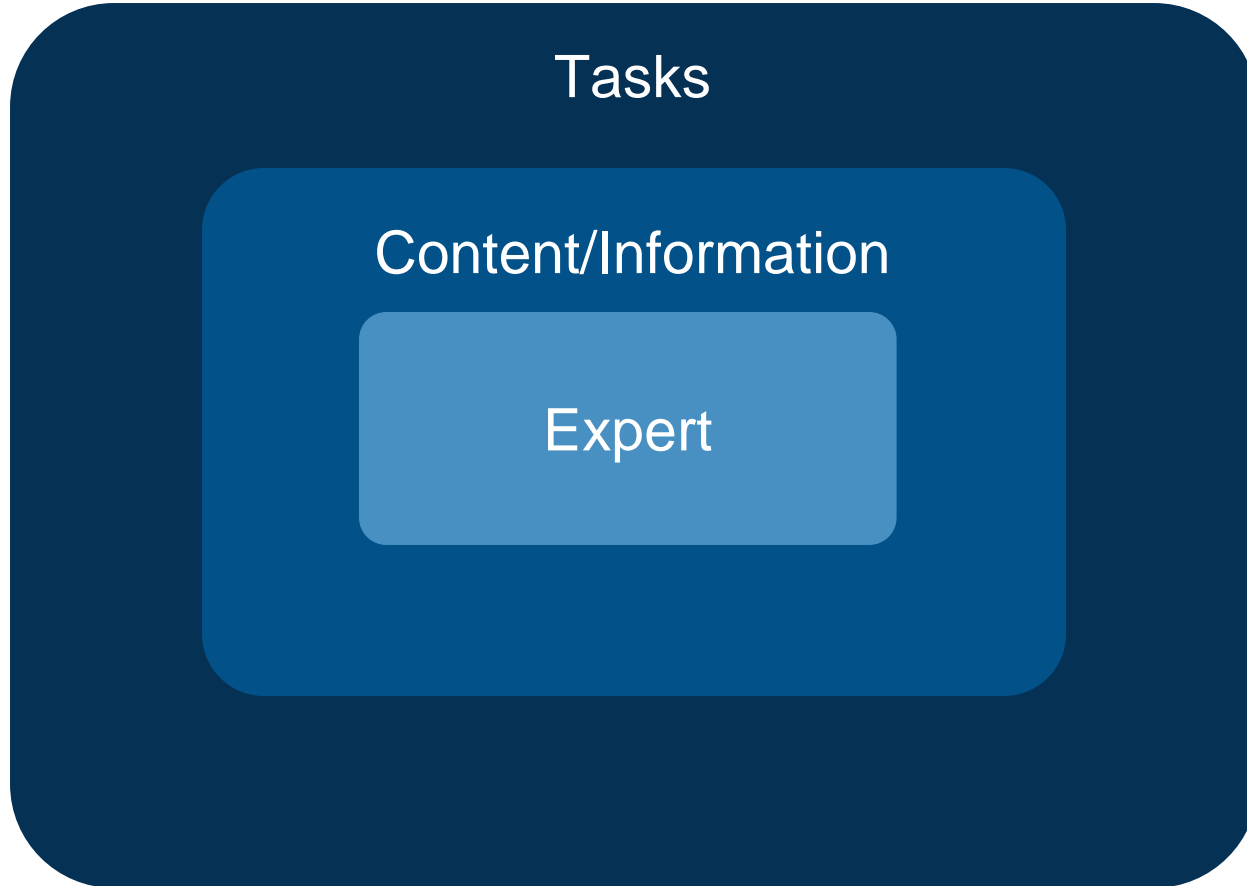
IBM Enterprise Content Management

Contenuti al centro per decisioni più intelligenti.



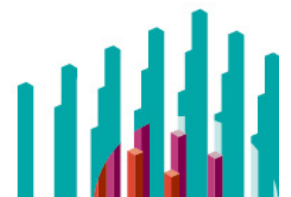


Case Management



IBM Enterprise
Content Management

Contenuti al centro per decisioni più intelligenti.





La soluzione IBM



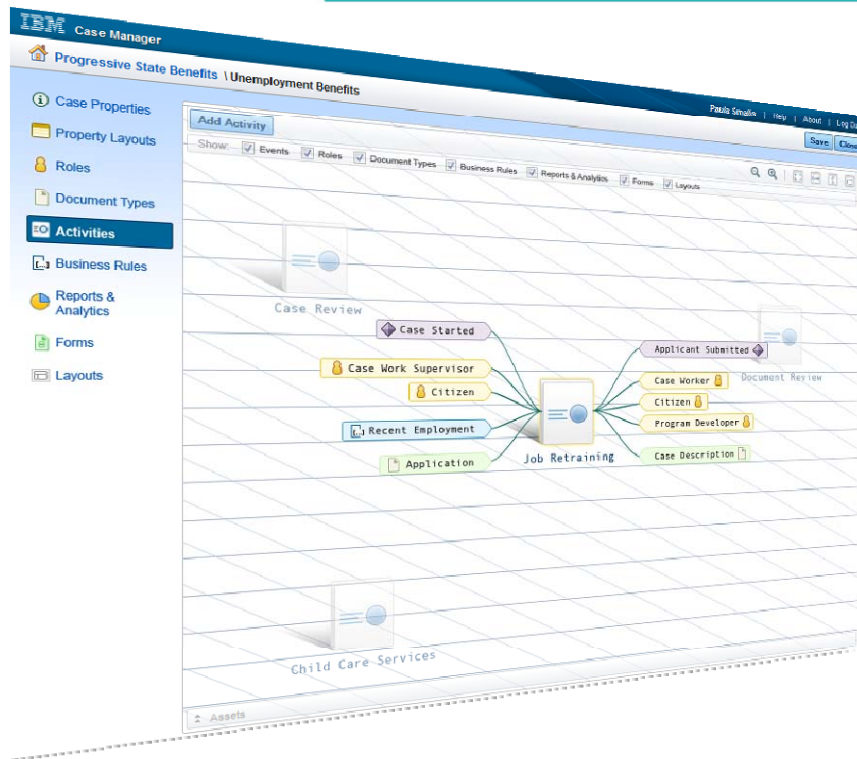
IBM Enterprise Content Management

Contenuti al centro per decisioni più intelligenti.



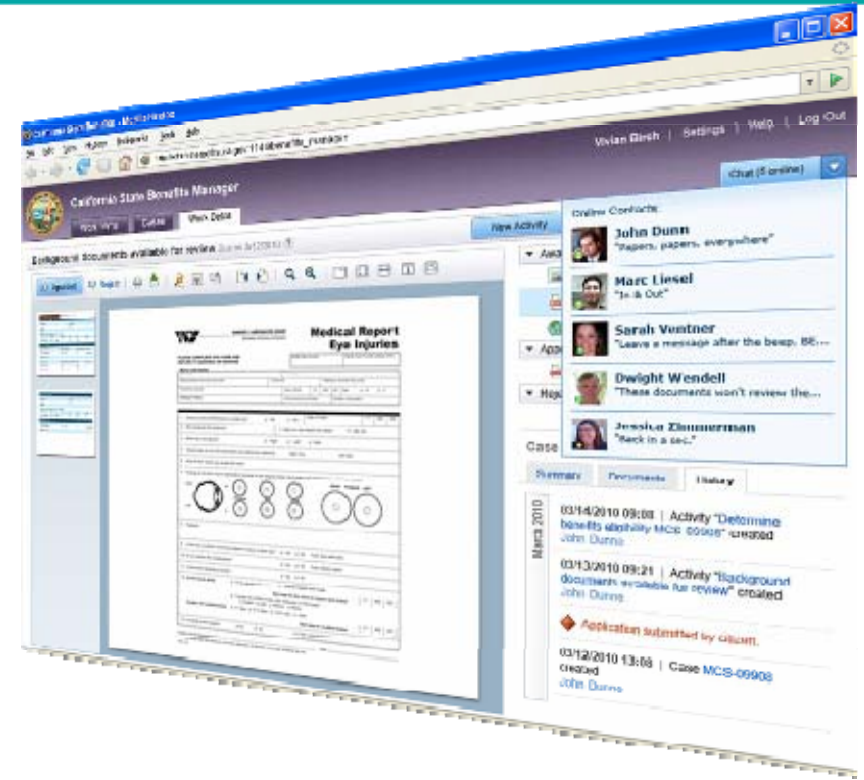


Le due parti della soluzione



Progettazione del caso

- Tratta tutti i tipi di risorse
- Comprende modelli pre-configurati
- Riduce i tempi di sviluppo



Espletamento da parte dell'utente

- Completamente personalizzabile
- Aperta a plug-in
- Contestualizza le informazioni
- Supporta interazioni tra persone, processi e contenuti

IBM Enterprise Content Management

Contenuti al centro per decisioni più intelligenti.



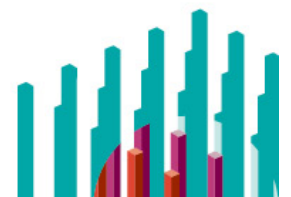



Solution Builder

IBM Case Manager

IBM Enterprise Content Management

Contenuti al centro per decisioni più intelligenti.



 **Create a solution**

Select a template


Use interview

 **Unemployment Claims Proc...** Status: Deployment successful
Solution description...
Last modified by Paula Smalls on 21 October 2010

[Edit](#) | [Open Interview](#) | [Deploy](#) | [Test](#) | [Remove](#)

 **Recycling** Status: Deployment successful
Solution description...
Last modified by Paula Smalls on 21 October 2010

[Edit](#) | [Open Interview](#) | [Deploy](#) | [Test](#) | [Remove](#)

 **Law Enforcement** Status: Deployment failed
Solution description...
Last modified by Paula Smalls on 21 October 2010
5 errors

[Edit](#) | [Open Interview](#) | [Deploy](#) | [Test](#) | [Remove](#)

Si può partire da zero o da un template esistente

Manage Solutions \ California State Benefits

California State Benefits [Edit](#)[Save](#)[Back](#)

Case prefix: CAL

A solution includes one or more cases. Each case must have a name and at least one task. You assign solution roles to cases and tasks. [Learn more...](#)

[Case Types](#)[Properties](#)[Roles](#)[Document Types](#)[Add Case Type](#)[Unemployment Benefits](#) State of California

Created on 03/21/2010 by Paula Smalls | Last modified on 03/25/2010 by Paula Smalls



Una soluzione può trattare diversi tipi di pratica

Manage Solutions \ California State Benefits



California State Benefits [Edit](#)

[Save](#) [Close](#)

This is where the description goes
Created by [Paula Smalls](#) on 21 October 2010

A solution includes one or more cases. Each case must have a name and at least one task. You assign solution roles to cases and tasks. [Learn more...](#)

- Case Types
- Properties
- Roles
- Document Types
- Personal Inbasket

[Add Property](#)

Name ^	Type	Description																											
Case ID	Text	Uniqe identifier																											
Case Type	Text	Case type																											
<table border="1"> <thead> <tr> <th>Name</th> <th>Type</th> <th>Description</th> <th>OK</th> <th>Cancel</th> </tr> </thead> <tbody> <tr> <td>Citizen Name</td> <td>Text</td> <td>Citizen name</td> <td></td> <td></td> </tr> <tr> <td colspan="5"> <p>▼ Advanced Values</p> <table border="1"> <tr> <td>Value:</td> <td>Max length:</td> <td>Choice list:</td> <td></td> </tr> <tr> <td> <input checked="" type="radio"/> Single <input type="radio"/> Multiple </td> <td> 256 </td> <td> <None> </td> <td> Open list editor </td> </tr> <tr> <td colspan="4"> <input checked="" type="checkbox"/> Reuse existing property outside ACM </td> </tr> </table> </td> </tr> </tbody> </table>			Name	Type	Description	OK	Cancel	Citizen Name	Text	Citizen name			<p>▼ Advanced Values</p> <table border="1"> <tr> <td>Value:</td> <td>Max length:</td> <td>Choice list:</td> <td></td> </tr> <tr> <td> <input checked="" type="radio"/> Single <input type="radio"/> Multiple </td> <td> 256 </td> <td> <None> </td> <td> Open list editor </td> </tr> <tr> <td colspan="4"> <input checked="" type="checkbox"/> Reuse existing property outside ACM </td> </tr> </table>					Value:	Max length:	Choice list:		<input checked="" type="radio"/> Single <input type="radio"/> Multiple	256	<None>	Open list editor	<input checked="" type="checkbox"/> Reuse existing property outside ACM			
Name	Type	Description	OK	Cancel																									
Citizen Name	Text	Citizen name																											
<p>▼ Advanced Values</p> <table border="1"> <tr> <td>Value:</td> <td>Max length:</td> <td>Choice list:</td> <td></td> </tr> <tr> <td> <input checked="" type="radio"/> Single <input type="radio"/> Multiple </td> <td> 256 </td> <td> <None> </td> <td> Open list editor </td> </tr> <tr> <td colspan="4"> <input checked="" type="checkbox"/> Reuse existing property outside ACM </td> </tr> </table>					Value:	Max length:	Choice list:		<input checked="" type="radio"/> Single <input type="radio"/> Multiple	256	<None>	Open list editor	<input checked="" type="checkbox"/> Reuse existing property outside ACM																
Value:	Max length:	Choice list:																											
<input checked="" type="radio"/> Single <input type="radio"/> Multiple	256	<None>	Open list editor																										
<input checked="" type="checkbox"/> Reuse existing property outside ACM																													
Claimant ID	Text	Claimant ID																											
Description	Number	Description of case																											



Ogni pratica ha un insieme di dati/documenti allegati

Solution Designer User Name | Help | About | Log Out

Manage Solutions \ Solution Name \ Case Name

Case Information | Case Folders | Properties | Views | **Activities**

Add Activity | Add Set | Add Comment Save | Close

Group by: Priority | Set

▼ No Set

ID Verification
Description: Check citizen ID
Start: Manual
Precondition: Case start
Set: <None>

Background Info
Description: Automatic collection of background info
Start: Automatic
Precondition: Case Start
Set: <None>

General | Preconditions

Name: ID Verification

Symbolic name: ID_ver

Description: Check citizen ID

Start mode:
 Automatic Manual User created
 Required

Set membership: <None>

OK | Cancel

Case Review
Description: lorem ipsum dolor and so on to fill the space
Start: Manual
Precondition: Property.DocReview=Pass
Set: <None>

▼ Inclusive Set: Extended Assistance

Evaluate Rental Asst
Description: Optional review based on case review
Start: Manual
Precondition: Property.CaseRev=Pass
Set: Extended Assistance

Evaluate Job Retraining
Description: Optional review based on case review
Start: Manual
Precondition: Property.CaseRev=Pass
Set: Extended Assistance

Evaluate Child Care Asst
Description: Optional review based on case review
Start: Manual
Precondition: Property.CaseRev=Pass
Set: Extended Assistance

Deployment Errors
No errors

Success messages

L'esito può venire deciso attraverso uno o più task



Case Client - Demo

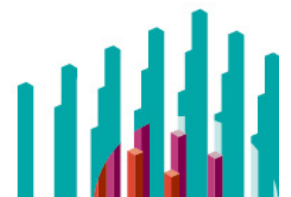
IBM Case Manager

The screenshot displays the IBM Case Manager interface for a candidate case. The top navigation bar includes the IBM logo, 'Case Manager', and 'Candidate Selection'. The main content area is divided into three panels:

- Case Information:** Contains a 'Documents' tab with a table listing documents. The table has columns for 'Name', 'Date modified', and 'Modified by'. Two documents are listed, both modified on Nov 17, 2010, by 'Intgpeadmin'.
- Document Viewer:** Displays a large image of a white, two-story building with a central tower and a red roof, set against a blue sky and green lawn.
- Case Data:** Contains an 'Edit' button and fields for 'Last Name: Washington', 'First Name: George', and 'Phone Numbers: 949 494 9494; 714 327 3222'. It also has sections for 'Address' and 'Hiring Information' with checkboxes for 'Hire' and 'Ready for selection'.

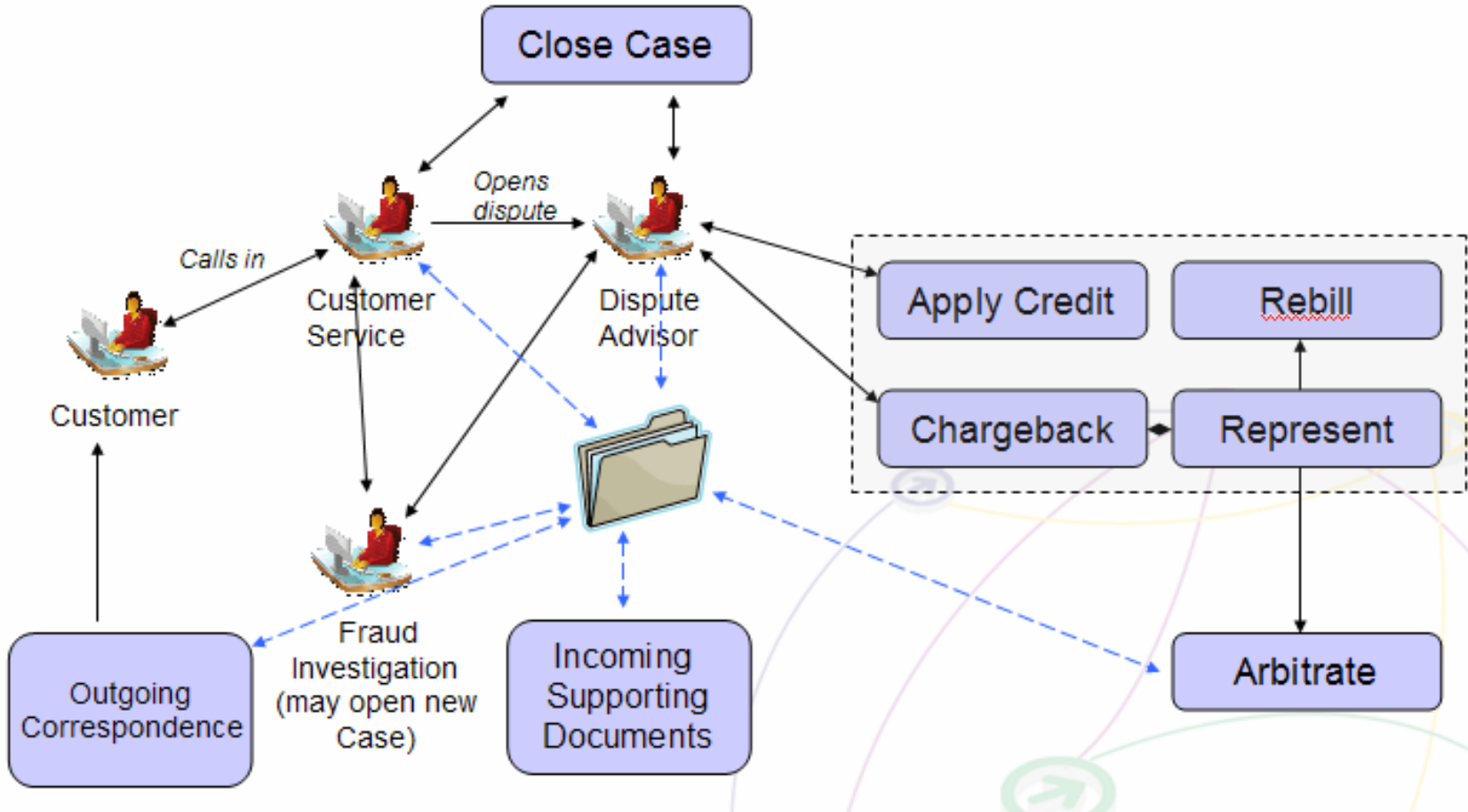
IBM Enterprise Content Management

Contenuti al centro per decisioni più intelligenti.



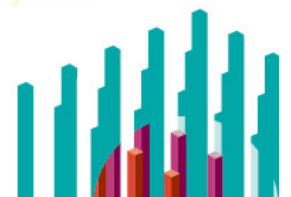
Caso demo

High Level Process Flow – Managing a Dispute



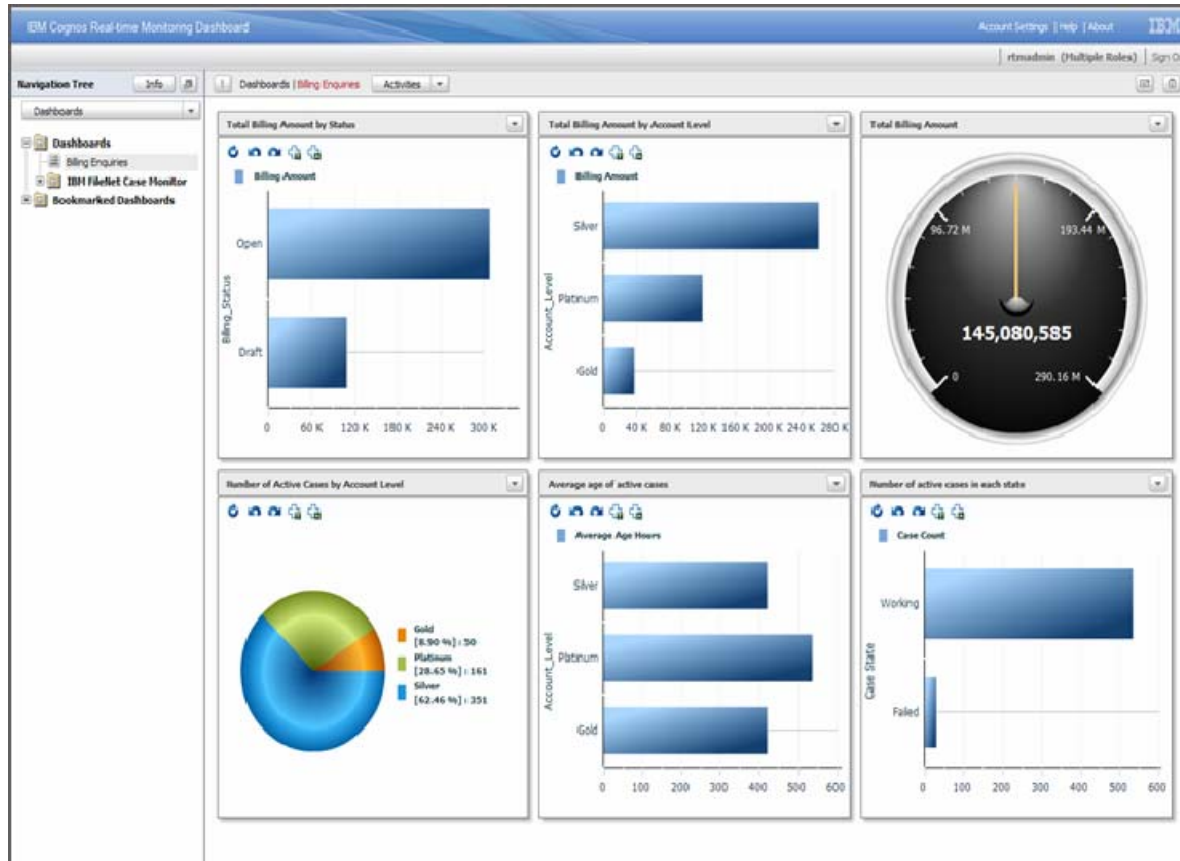
IBM Enterprise Content Management

Contenuti al centro per decisioni più intelligenti.





Strumenti di Analisi



• I responsabili delle aree di business ottengono visibilità sulla situazione e possono intraprendere eventuali correttivi

• Possono essere effettuate indagini per individuare trend e correlazioni prima che diventino evidenti

IBM Enterprise Content Management

Contenuti al centro per decisioni più intelligenti.

