



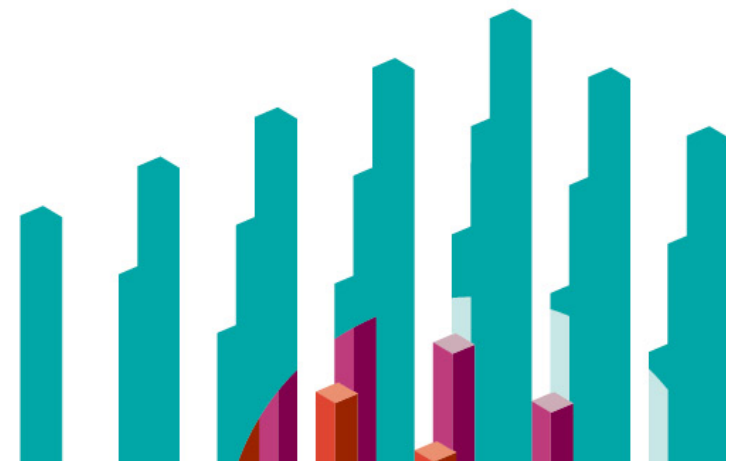
Marco Bonasoro

Case Management - Approfondimenti

IBM Enterprise

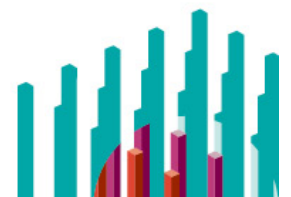
Content Management

Contenuti al centro per decisioni più intelligenti



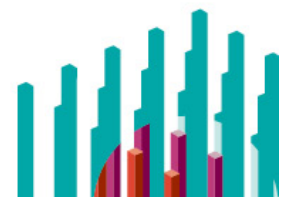
Applicazioni target

- 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



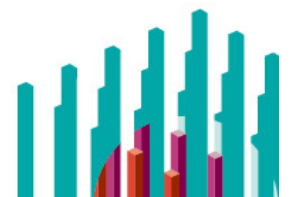
ECM: perché

- Complessità delle informazioni trattate
- Natura gerarchica
- Multi formato
- Necessità di ricerche (metadati)
- Oggetti pertinenti a casi multipli
- Security
- Retention
- Produzione non solo di esiti ma di ulteriori documenti



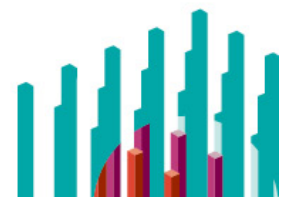
Collaboration: perché

- La risoluzione dei casi discende da un lavoro condiviso
- Vi sono attività di routine e altre di valutazione “intelligente”; i due gruppi di utenti devono scambiarsi informazioni e passarsi il testimone in maniera trasparente
- I thread di informazione devono venire a loro volta salvati e storicizzati per costituire un corpus di “precedenti”



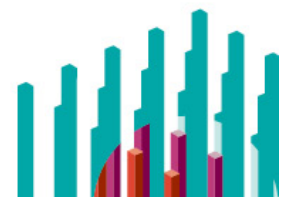
BPM: perché

- BPM e ACM sono entrambi orientati alla soluzione di task ripetitivi, goal-oriented, tuttavia:
 - L'approccio del BPM è di formalizzare quali attività occorre svolgere, in quale ordine, da parte di chi;
 - L'ACM riconosce la natura solo parzialmente ripetibile dei processi di business, e cerca di mettere a disposizione del knowledge worker gli strumenti più adatti. Egli può decidere quali task sono necessari per lo specifico caso e quali no.



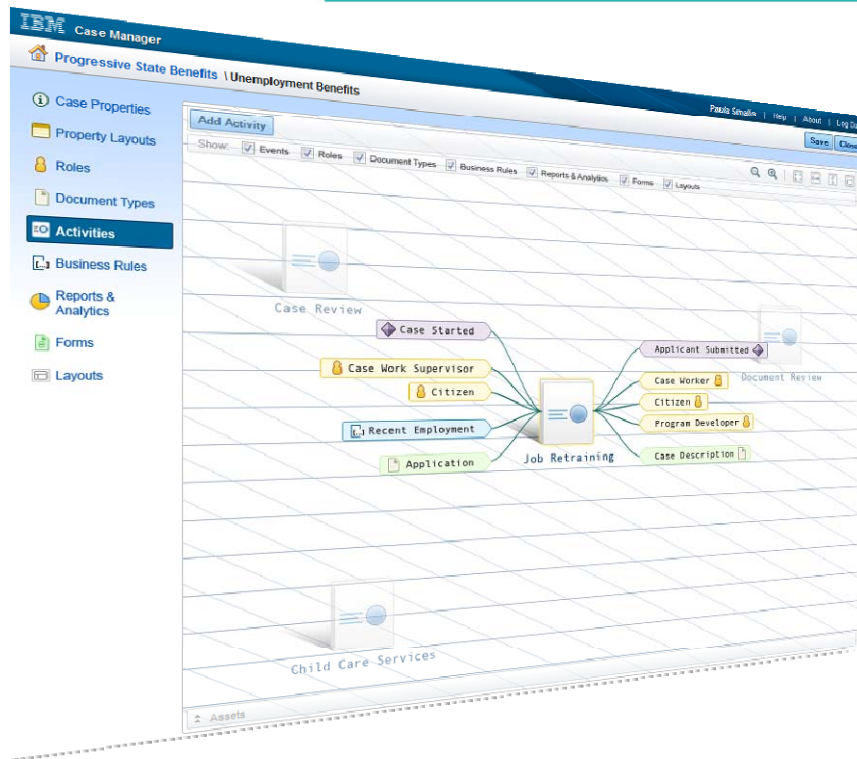
ACM non è BPM

- Non formalizzabile o predicibile a priori al 100%
- I contenuti sono sempre alla base delle decisioni prese
- L'utente decide quale attività occorre per il completamento, non il sistema
- Un task definisce cosa va fatto, ma lascia all'utente (in certa misura) di decidere come farlo; un processo BPM invece definisce sia cosa fare che come farlo
- Le informazioni sul caso restano disponibili anche dopo il completamento (anzi, entrano a far parte del corpus di conoscenza)



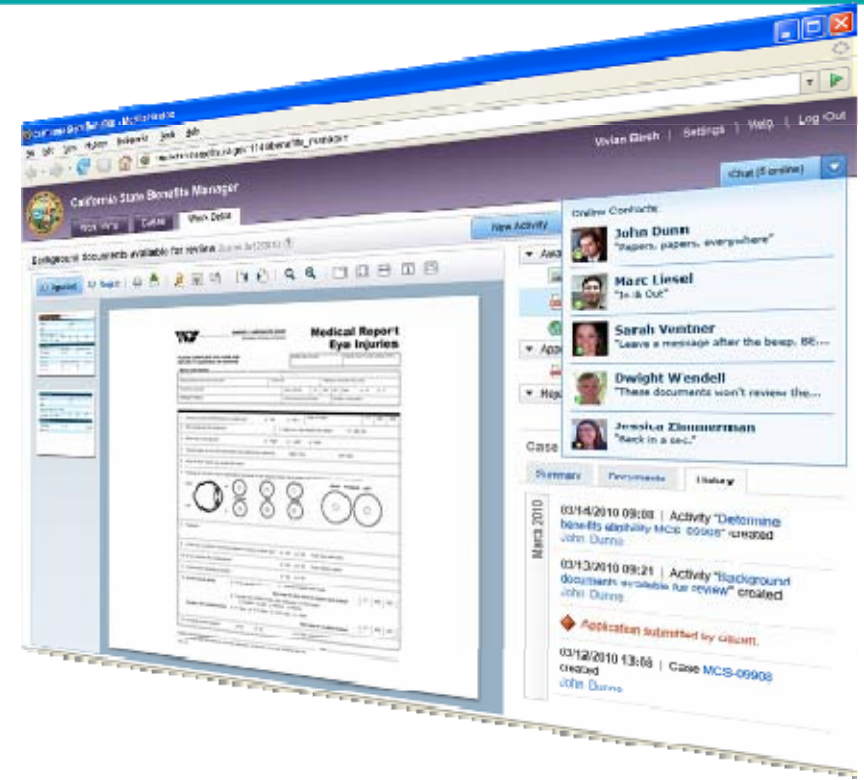


Le due parti della soluzione



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

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 **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...
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 **Law Enforcement** Status: **Deployment failed**
Solution description...
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5 errors

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Si può partire da zero o da un template esistente

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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...](#)

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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

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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																											
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<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>

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

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

Inclusive Set: Extended Assistance

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

Deployment Errors
No errors

Success messages

L'esito può venire deciso attraverso uno o più task

Step Editor: Create Custom Program

Palette



Attributes

*Required OK Cancel

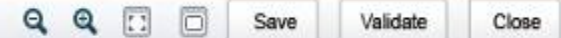
Name	Value
*Name	Build train...
*Description	The step for crea
Instruction	Design a ...
Deadline	1 week
Reminder	<None>
Delegation	Not allowed
Responses	<None>

Validation Errors

No errors

Manage Work Groups

Manage Attachments

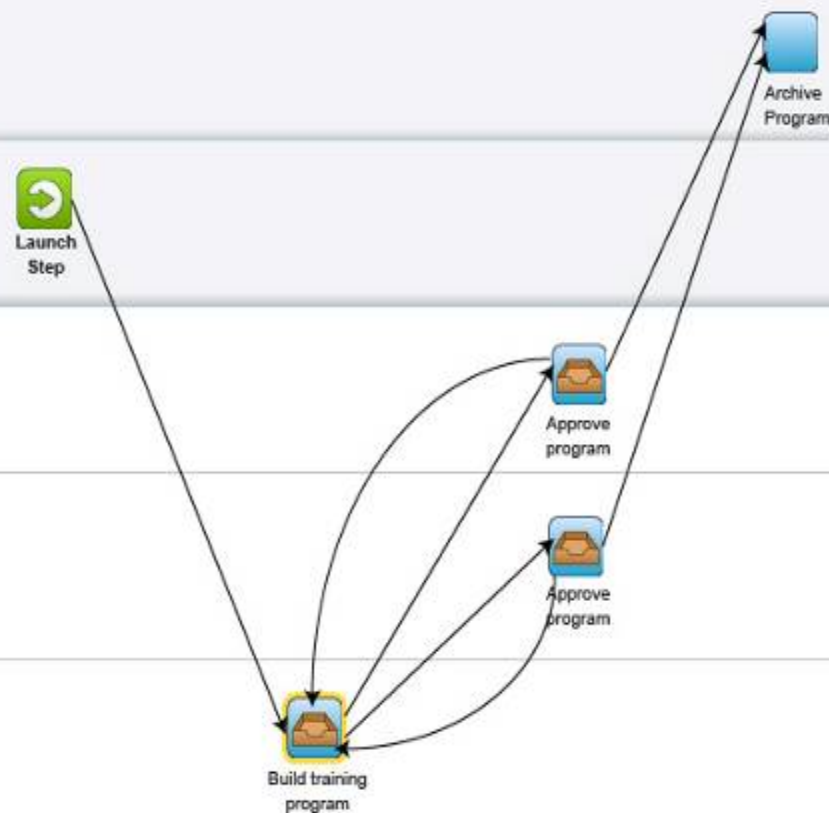


Limited Support

Unassigned

Case Work
Supervisor

Case Worker

Program
Developer

I task più complessi possono venire formalizzati attraverso ruoli e swim lanes

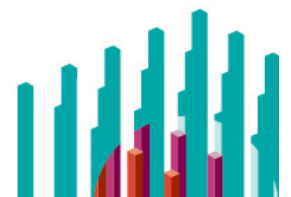


Solution Builder - demo

IBM Case Manager

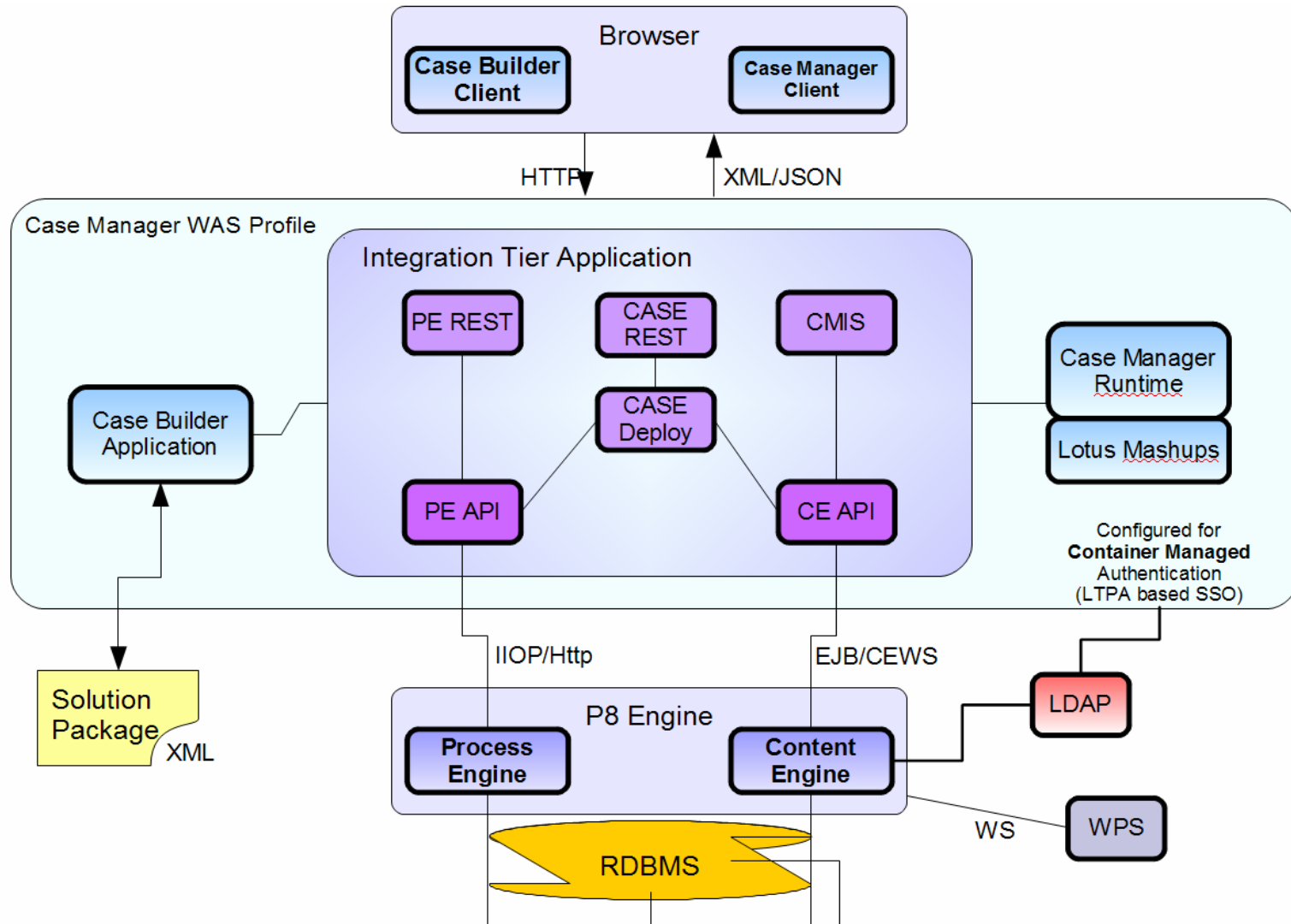
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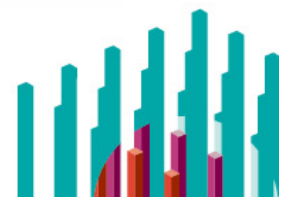


Componenti Architeturali



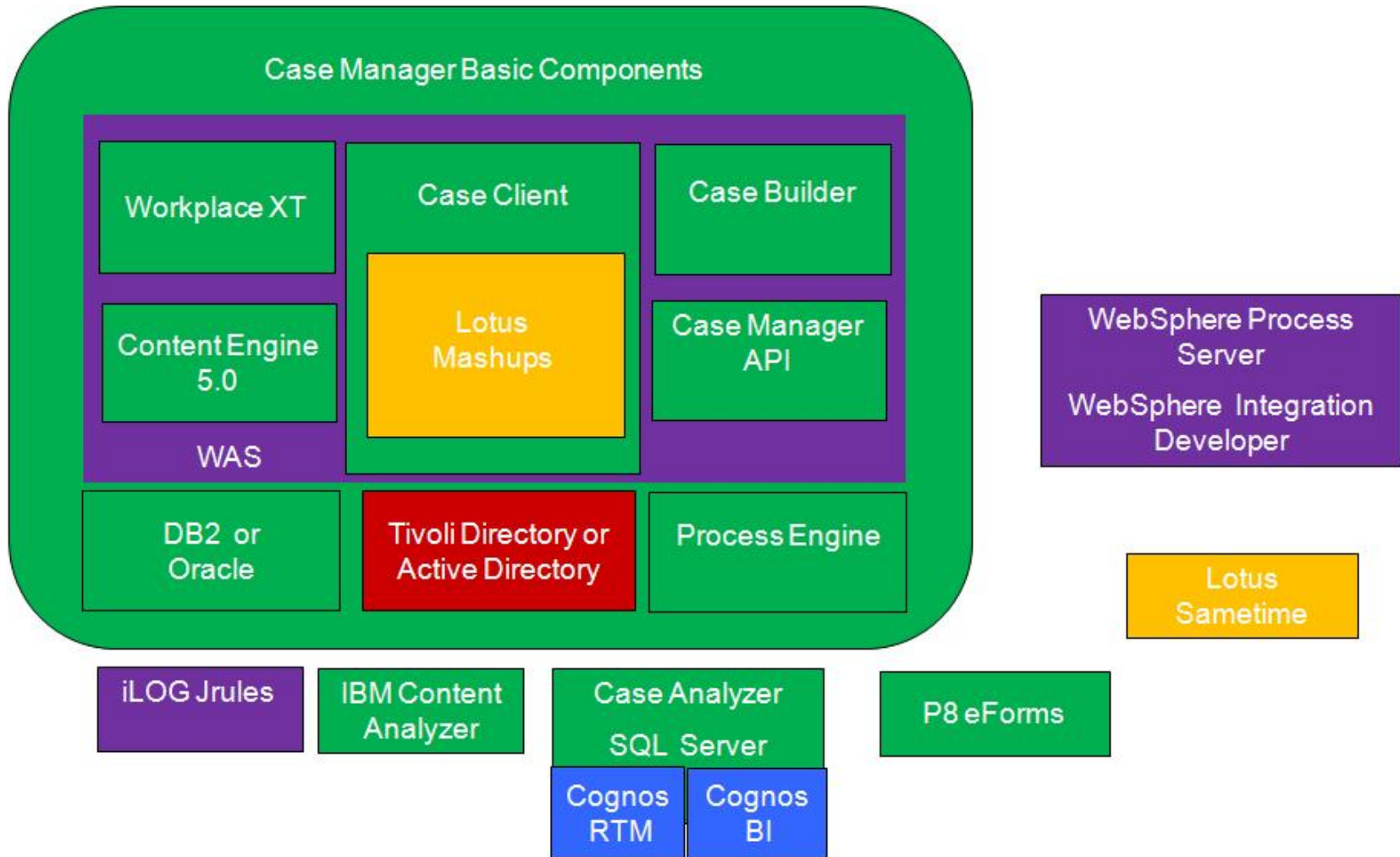
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Prodotti Integrati



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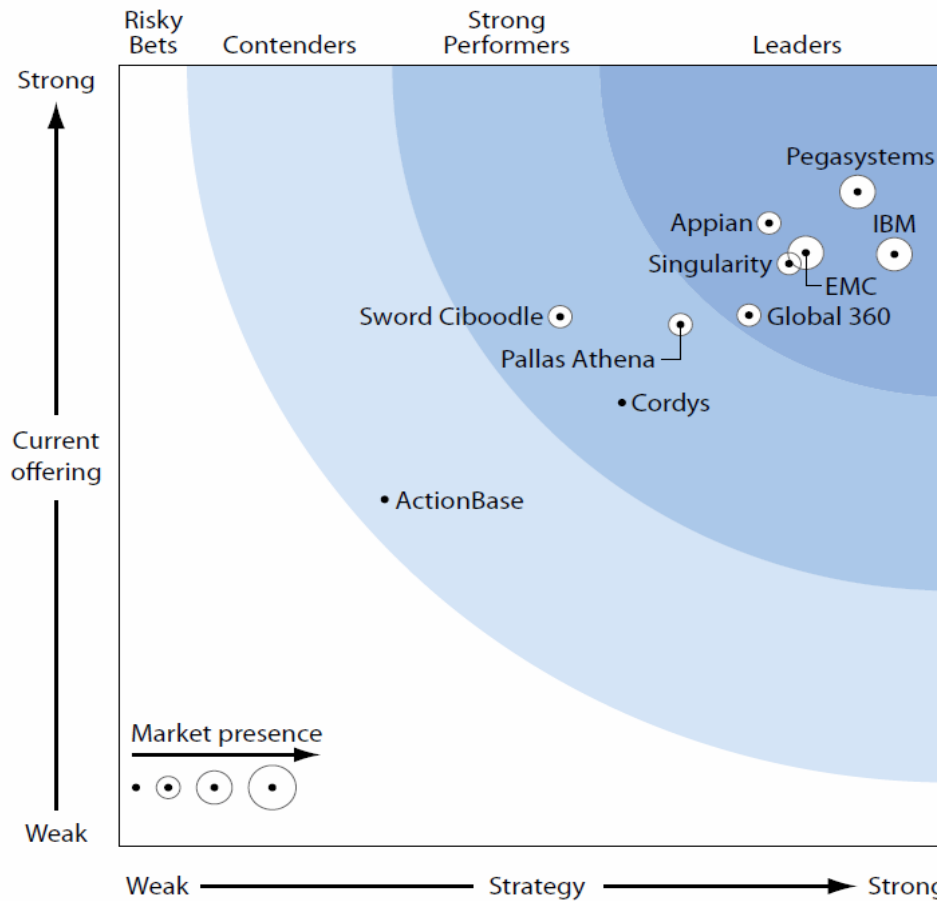
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Una soluzione già leader

Forrester Wave™: Dynamic Case Management, Q1 '11



The Forrester Wave™
Smart data for smart decisions

Go online to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

Source: Forrester Research, Inc.

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