

Dave Perman – Product Manager | IBM | ECM | ICM

16 September 2014

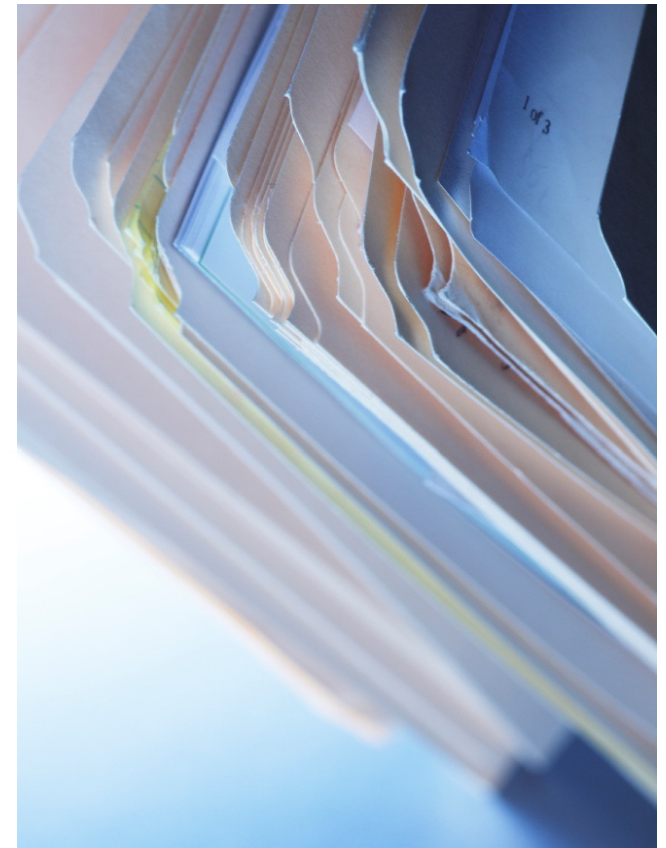
A Business Analysts Guide to Delivering Solutions with IBM Case Manager

Powerful tools to kick start your case style solution creation



New market demands require new approaches

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



Challenges for IT

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

Case Management - Increasing importance of case style of work

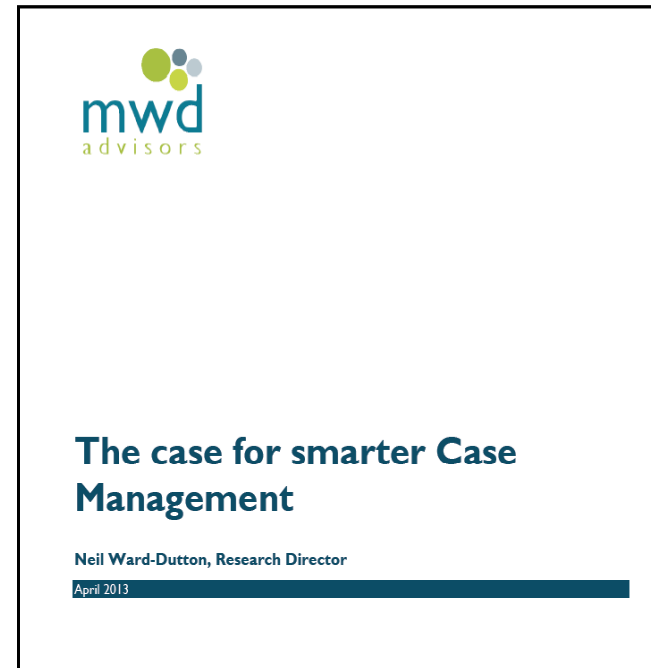


*“Casework is **complex and not routine**. Each case is a unique situation that involves complex interactions between **content, people, business and regulatory policies** to achieve an **optimal outcome**. Casework involves information, judgment, experience and policies, and strives to balance multiple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

Case-style work

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

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

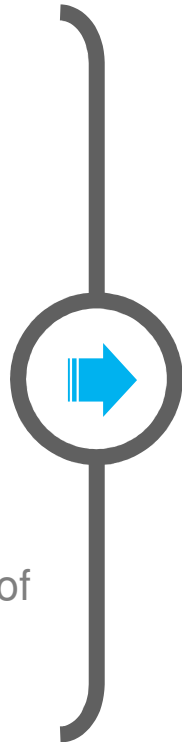


Marketplace view

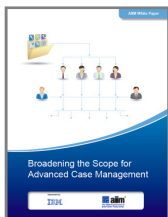
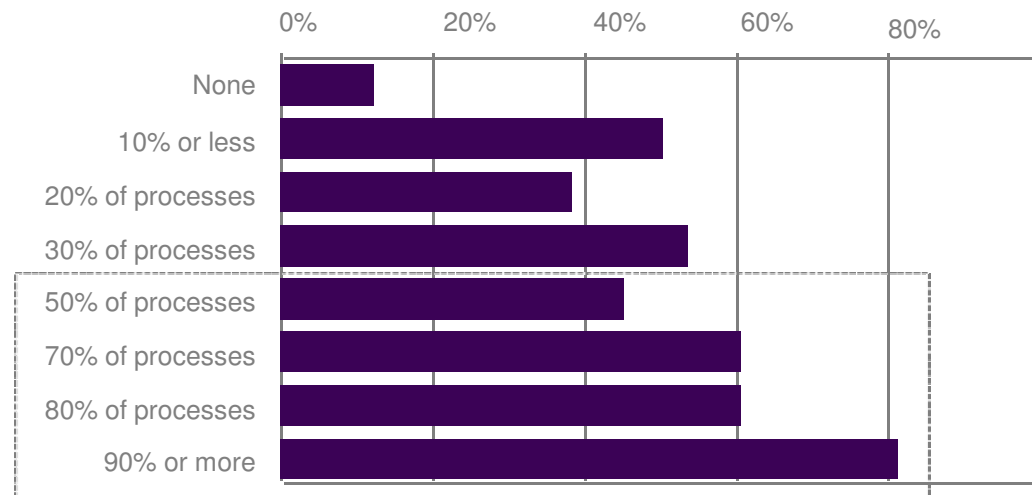
More than
60%



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



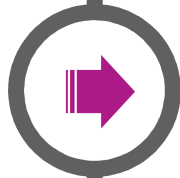
What proportion of your main line-of-business (LOB) processes would you say involve a case file, claim file, proposal, bid, incident report, service ticket, etc.?



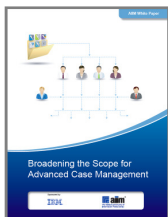
SOURCE: AIIM, *Broadening the Scope for Advanced Case Management*, Doug Miles, 2013, <http://public.dhe.ibm.com/software/data/sw-library/ecm-programs/IBM-AdvancedCaseManagement-2013-Final.pdf>. © AIIM 2013 www.aiim.org/© IBM 2013 www.ibm.com

Marketplace view

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

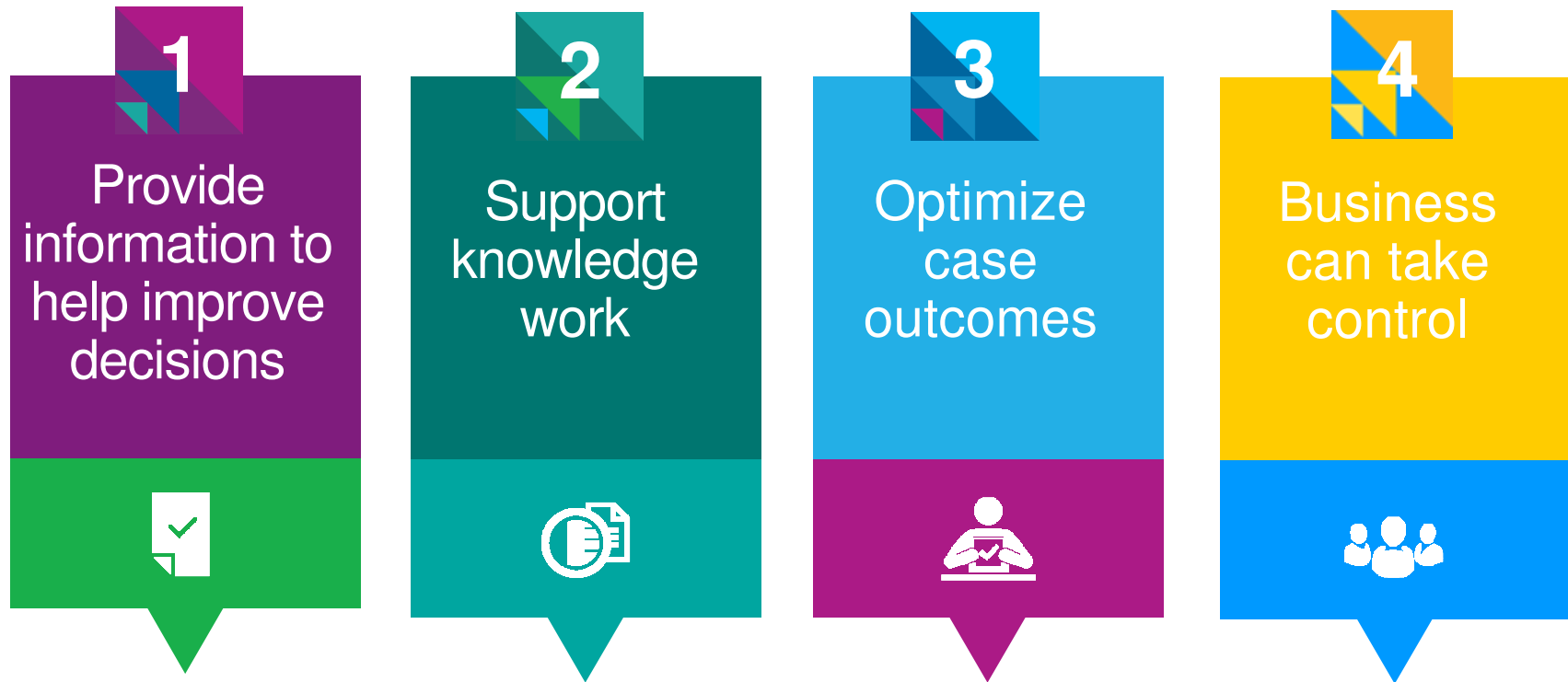


How would you categorize your most prevalent or important case application(s)?



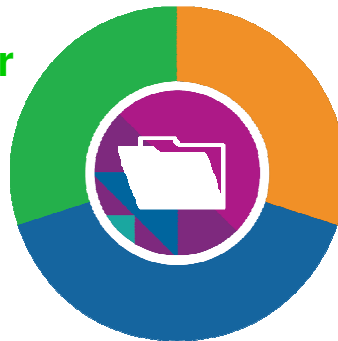
SOURCE: AIIM, *Broadening the Scope for Advanced Case Management*, Doug Miles, 2013, <http://public.dhe.ibm.com/software/data/sw-library/ecm-programs/IBM-AdvancedCaseManagement-2013-Final.pdf>. © AIIM 2013 www.aiim.org/© IBM 2013 www.ibm.com

Capabilities required to address case style workloads



Discover

Recognize



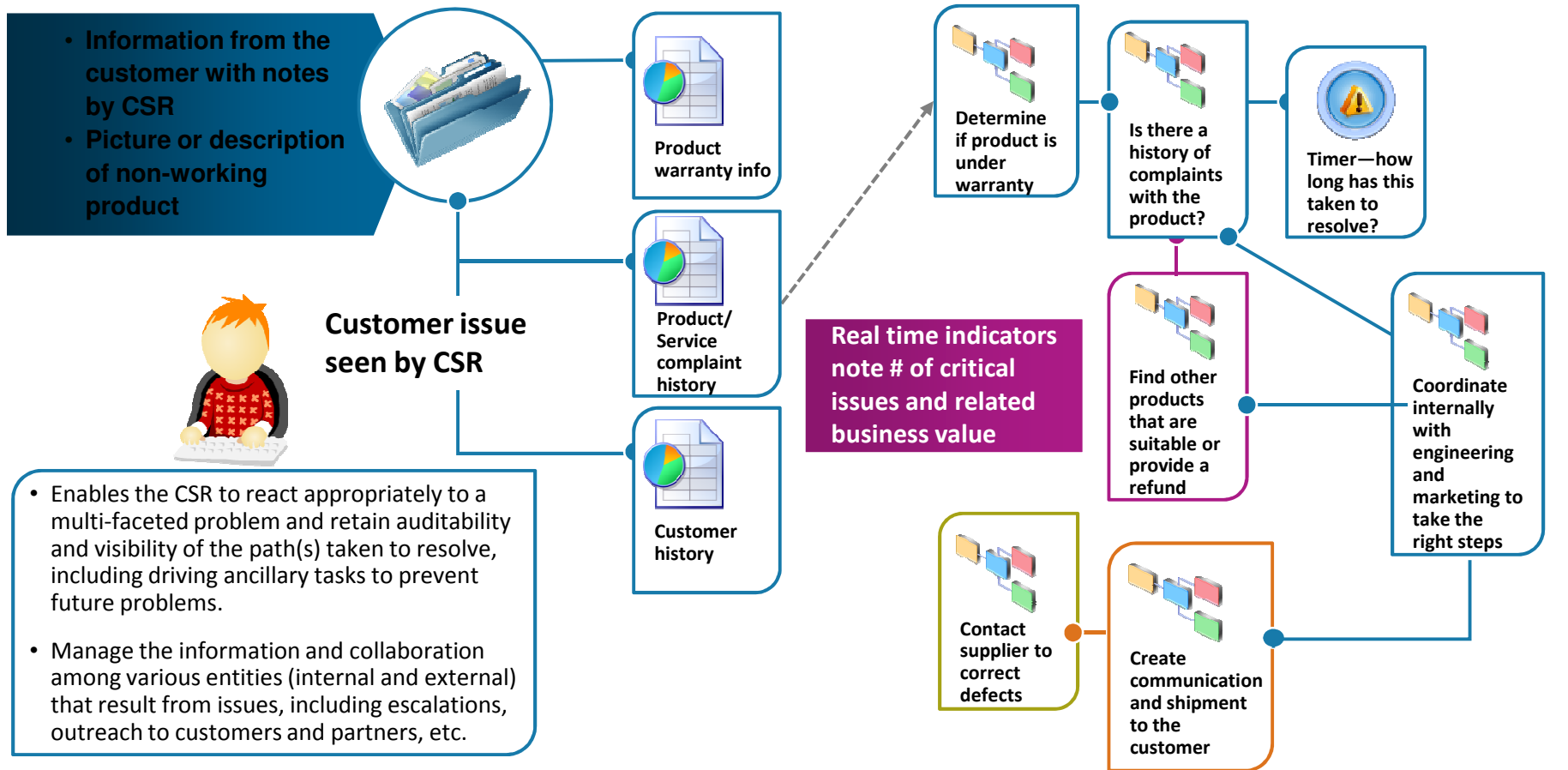
Act

Case Style Example - Customer Service

A customer calls and complains about a problem with a recently purchased product or service

Persisted, analyzed, reported

Automatic and manually initiated tasks



IBM Case Manager leverages existing investments to improve customer satisfaction

Texas Municipal Retirement System

The solution is targeted to support SLA objectives by enabling insight-to-action responsiveness in adjusting case flows to meet changing business needs

The need

- Support diverse customer needs through **flexible activities**
- Meet key internal service level agreements (SLAs) designed to compete successfully
- **Reduce costs** by replacing a highly customized and rigid application which required constant investment
- Gain the benefits of new solution capabilities with minimal disruption to the business

The solution

- Engaged IBM **Business Partner Adjacent Technologies** who recommended IBM Case Manager
- Leverages **existing IBM FileNet Content Manager investment**
- Planned for phased deployment beginning with member benefits and proceeding to address policies, contracts and taxes
- IBM Case Manager offers **90 percent of the required capabilities out of the box**
- Easily configurable case flows **enable business users to quickly adapt** and build case flows for specific needs and to create business rules for automatic, proactive response to potential SLA issues
- Provides dashboards and built-in analytic capacities to help managers identify SLA issues and trends

Projected benefits

- **Replace a rigid solution** with a highly configurable IBM Case Manager solution that can change as business needs change
- Improve productivity with configurable case flows that **allow knowledge workers** to identify, launch and track tasks to personalize individual case needs
- Respond proactively to SLA issues with dashboard monitoring and analytics.
- Flexible business rules allow **rapid changes** in how work flows across the organization.

A Large Retail Bank in Sweden



Creating efficiencies and transparency for back office operations in record time

Increase customer satisfaction by lowering numbers of customer call-backs

The need

- Address over **250 different case types** related to retail banking operations
- Update case handling capabilities from an integration of outdated and custom applications to a **more flexible, future-proofed solution**
- Provide easy-to-use case handling and management capabilities for 200 back office employees as well as 5,000 more casual users

The solution

- The bank engaged IBM and **Business Partner Apendo**, to developed a tailored prototype in a very short time
- **IBM Case Manager (ICM)** offers the ability to manage cases through their entire lifecycles and enables any missed tasks to be run as necessary, providing flexibility. Provided business dashboards to **monitor SLAs** as well as historical and real time analytics to help manage case processing loads effectively.
- ICM integrated technology set will enable the organization to take advantage of additional functionality as desired without having to continually invest in new platforms.

Projected benefits

- **Reduce FTEs** required to support its application needs
- **Increase customer satisfaction** by lowering numbers of customer call-backs and increasing case/document transparency
- Over time, **expand case processing capabilities to end customers.**

IBM Case Manager Provides Compliance and Efficiency

Automated Audit Control offers peace of mind and - with rapid compliance response - a significant and increasing ROI

The need

- In order to simplify their materials records and delivery process the customer required a case based application to automate their manifest documentation process
 - The **automation** of the manifest process by **merging process management with document management**
 - Meeting **compliance requirements** in highly regulated industries

The solution

IBM Case Manager provided a **case file framework that enabled the process management, document creation and validation, with the final document collation, rules driven review and record creation.**

- Case based manifest created of all documents created during the assembly, inspection and distribution processes
- Provided an audit log of decisions and document sign offs throughout the process
- Merged final manufacturing documentation with shipping documentation and enabled disposition.

Projected benefits

- **More efficient** process management and milestone control
- **Increased accuracy** of data collection
- Automated **audit control**
- Regulatory compliance

Large US Health Insurance Company



Driving enterprise efficiencies and cost reduction

Targeted savings of \$2.6M annually in replacing custom frameworks and system consolidation along with \$4M in risk mitigation

The need

- Long-term FileNet BPM customer with **over 11,000 knowledge workers** enterprise-wide using the solution
- Customized solution framework developed on FileNet Business Process Manager was difficult to manage and change
- Seeking a single environment with broad out of the box capabilities and highly configurable design environment
- Seeking to **consolidate series of similar systems** with an additional 20,000 users into a single manageable platform

The solution

- IBM Case Manager replaces their custom framework with an extended set of pre-integrated capabilities out of the box
- Highly configurable design environment translates into **80 percent configuration** and only 20 percent customization to meet business requirements
- Target system consolidating and custom framework replacement in a key claims areas to prove out the enterprise cost justification

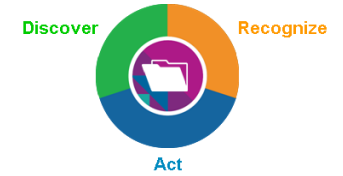
The benefits

- Single enterprise environment with broad out of the box capabilities and a highly configurable design environment
- IBM Case Manager provides **faster application development** and deployment cycles
- **Reduced costs** by eliminating enhancements and maintenance for custom frameworks



IBM Case Manager

Bringing it all together in one powerful platform



BA / Designer & IT

The screenshot shows the 'IBM Case Manager Designer' interface. It features a left-hand navigation pane with options like Case Type, Properties, Views, Case Folders, Rules, and Tasks. The main workspace displays a workflow diagram with two sections: 'Required tasks' and 'Optional tasks'. The 'Required tasks' section includes 'Review Dispute Item' and 'Close Case'. The 'Optional tasks' section includes 'Add Document', 'Arbitration', 'Evaluate for Fraud', 'Generate Close Letter', 'Generate Credit Letter', 'Generate Fraud Letter', 'Generate Provisional...', 'Generate Status Letter', and 'Process Chargeback'. Each task card shows its name, a description, and the assigned user.

Case / Task Worker

The screenshot shows the 'Case Manager' interface for a specific case, 'Smith.Bob-230813'. It displays a 'Customer Information' section with fields for Account ID, Contact Phone Number, Customer Name, and Customer Status. Below this is a 'Transaction Details' section with fields for Dispute Type, Disputed Amount, and Dispute Description. A timeline at the bottom shows the case's history, including creation and modification dates.

Manager

The screenshot shows the 'Case Monitoring Dashboard' with several analytics charts. A large gauge chart displays a total value of 1,450,080,585. Other charts include 'Total Billing Amount by Status', 'Total Billing Amount by Account Level', 'Number of Active Cases by Account Level', 'Average Age of Active Cases', and 'Number of Active Cases by Case State'. A pie chart shows the distribution of cases across different account levels: Gold (102,446), Platinum (102,446), Silver (102,446), and Bronze (102,446).

So what does a case style solution look like in IBM Case Manager?

Case Worker User Experience - Case Search Page

The screenshot shows the IBM Case Manager interface. At the top, the title bar reads "IBM Case Manager" and includes user information "Intgpeadmin" and the IBM logo. Below the title bar, there are tabs for "Cases" and "Work". On the left side, there is a navigation pane with icons for home, search, and settings. The main content area is titled "Superbank Front Office | Customer Service Representative". It features a search section with an "Add Case" button and a search input field labeled "Case Owner". Below the search input are "Search" and "Advanced Search" buttons. The search results are displayed as a list of cases:

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

On the right side, there is a task management panel for the selected case "Smith.Bob-230813". It has tabs for "Summary", "Tasks", and "History". Below the tabs is an "Add Task" button. The task list is divided into "Required (3)" and "Optional (9)" sections:

- Required (3)**
 - Close Case (Waiting...)
 - Review Dispute Item (Started on 23/08/2013 18:20)
 - Generate Status Letter (Completed on 23/08/2013 18:24)
- Optional (9)**
 - Add Document (Waiting...)
 - Arbitration (Waiting...)
 - Evaluate for Fraud (Waiting...)
 - Generate Close Letter (Waiting...)
 - Generate Credit Letter (Waiting...)
 - Generate Fraud Letter (Waiting...)
 - Generate Provisional Credit Letter (Waiting...)
 - Process Chargeback (Waiting...)

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

Case Worker User Experience – Opening a Case

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

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

- Navigation:** A sidebar on the left contains icons for home, search, and settings.
- Case Header:** Shows the case name "Smith.Bob-230813", the last modified date "28/08/2013 09:04", and a "Manage Dispute Item" link.
- Actions:** A row of buttons includes "Add Comment to Case", "Add Task", "Add Custom Task", and "Split Case".
- Documents:** A section with tabs for "Documents", "Tasks", and "History". It lists items like "Correspondence" (modified 23/08/2013 18:20), "Supporting Documents" (modified 23/08/2013 18:20), and "PC.jpg" (modified 28/08/2013 09:07).
- Customer Information:** A form with fields for "Account ID" (545-456-5456), "Contact Phone Number" (454 545-5434), "Customer Name" (Bob Smith), and "Customer Status" (Silver).
- Dispute Details:** A section with tabs for "Transaction Details" and "Dispute Details". It includes fields for "Dispute Type" (Quality of goods), "Disputed Amount" (458.00), "Dispute Description" (Broken PC), and "Merchant Name" (UsedStuff.com).
- Timeline:** A horizontal timeline at the bottom shows the case's history from 23 Aug 2013 18:00:00 to 27/08/2013.

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

Cases are Dynamic

Documents | **Tasks** | History

Add Task

Required (2)

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

Optional (11)

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

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

IBM Case Manager

Cases | Work | Information

Anderson.Sue-13.08.13 | Mr

Add Comment to Case | **Add Task**

Documents | **Tasks** | History

Add | Open | Actions

Home

Add Task

Select a task type:
Request Letter

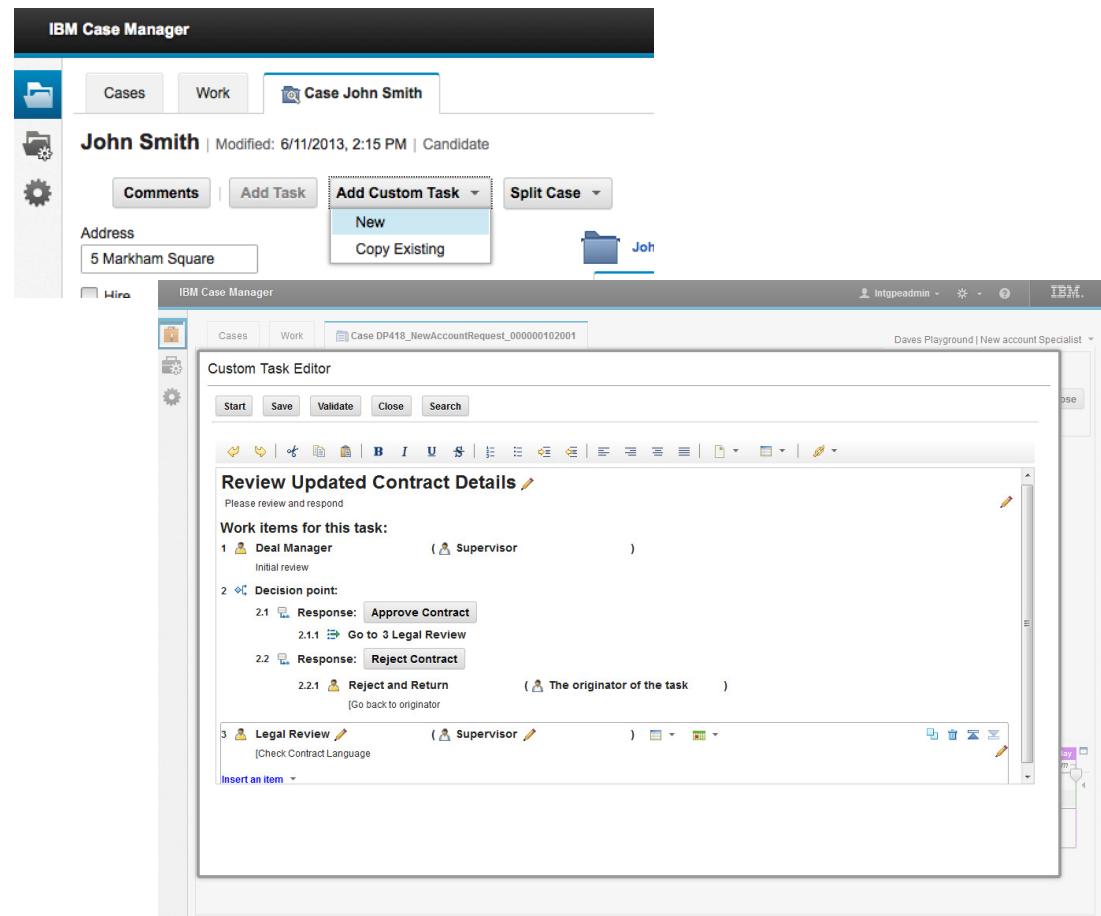
Enter a task name:
Request Letter

OK Cancel

Case workers can even add new Tasks to a case

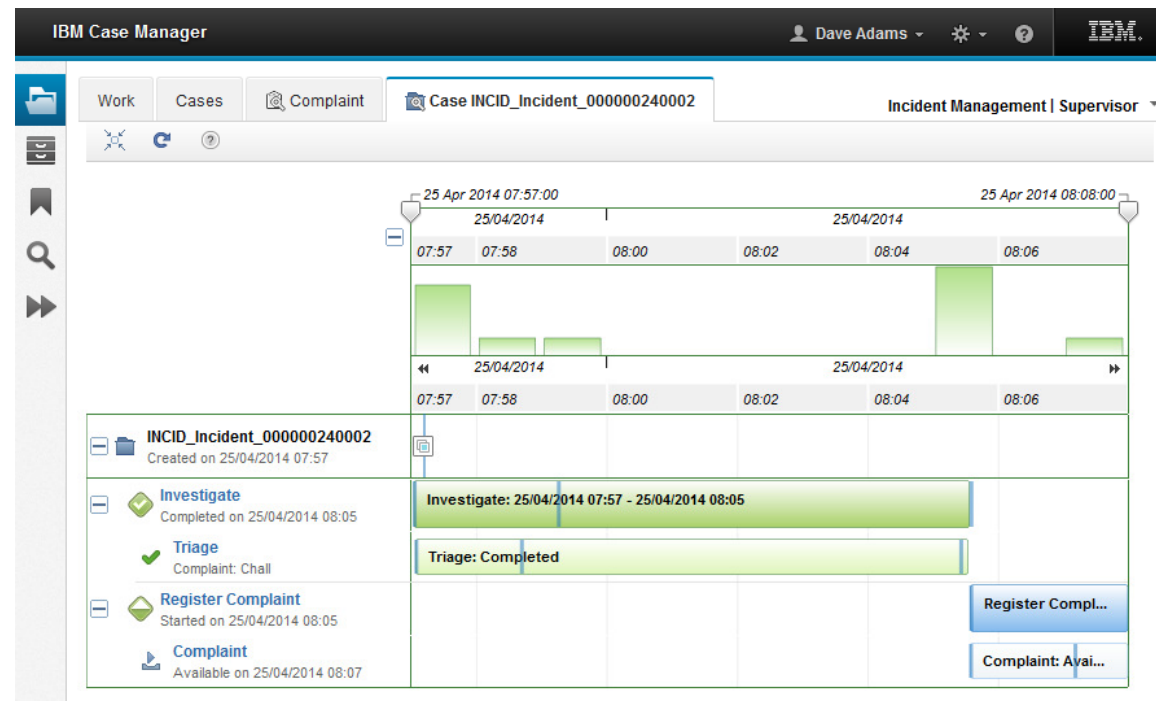
Case Worker Dynamic Custom Tasks

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



Case History Visualizer

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



Task Worker User Experience – In-baskets of Assigned Work

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

The screenshot displays the IBM Case Manager interface. At the top, it shows the user 'Intgpeadmin' and the role 'Superbank Front Office | Customer Service Representative'. The main area is divided into 'Cases', 'Work', and 'Information' tabs, with 'Work' selected. Below this, there are buttons for 'Manage Roles' and 'Add Case', and tabs for 'CSR Tasks (2)' and 'Personal Work Items'. A table lists tasks with columns for Time Created, Subject, Assigned Date, Work Item, and Customer Name. Two tasks are shown, both for 'Review Dispute Item' assigned to 'Intgpeadmin' on 28/08/2013. The second task is selected, showing a detailed history on the right. This history includes a document 'PC.jpg' and a series of task events: 'Review Dispute Item' (Task started, Task ready, Task created), 'Close Case' (Task created), 'Process Representation' (Task created), 'Process Chargeback' (Task created), 'Generate Status Letter' (Task created), 'Generate Provisional Credit Letter' (Task created), and 'Generate Fraud Letter' (Task created).

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

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

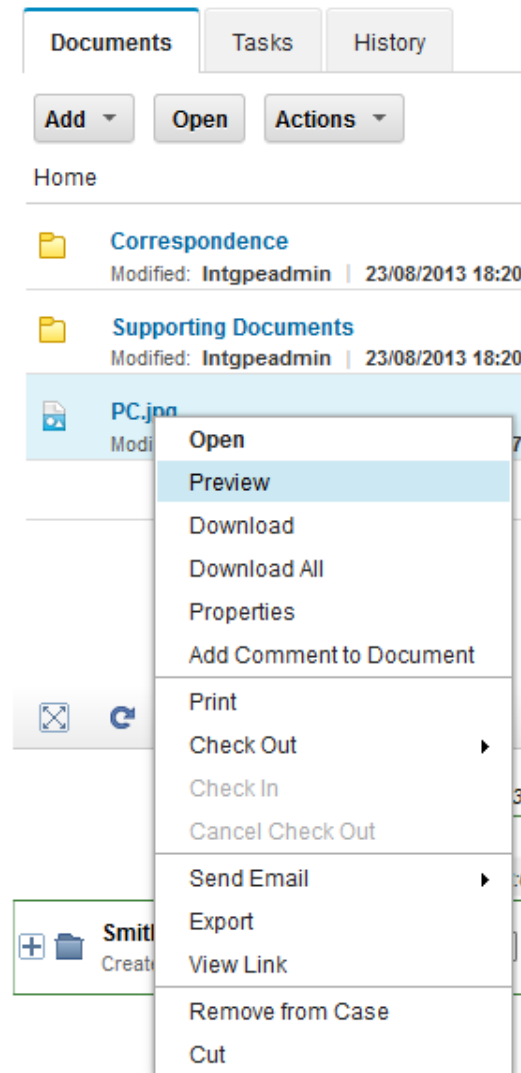
Task Worker User Experience – Work Details Page

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

- Header:** 'IBM Case Manager' on the left, user 'Intgpeadmin' and system icons on the right, and 'Superbank Front Office | Customer Service Representative' with a 'View Instructions' link.
- Navigation:** 'Cases' and 'Work' tabs, and a breadcrumb 'Gather Customer Data Identify Dispute'.
- Left Panel:**
 - 'Add Comment Work Item' button.
 - 'Routing' section with 'Date Case Opened' (28/08/2013 12:03) and 'Finality Date' (28/08/2013 12:00).
 - 'Customer Information' section with fields for 'Account ID' (5453345444), 'Customer Name' (Ed Jones), 'Contact Phone Number' (250 565-4544), and 'Customer Status' (Silver).
 - 'Transaction Details' section.
- Center Panel:**
 - Case ID: 'Jones.Ed-18.08.13'.
 - Navigation tabs: 'Summary', 'Documents', 'Tasks', 'History'.
 - 'Add', 'Open', and 'Actions' buttons.
 - 'Home' section with folders: 'Correspondence' (modified 28/08/2013 12:03) and 'Supporting Documents' (modified 28/08/2013 12:03).
 - Attachment: 'PC.jpg' (modified 28/08/2013 12:15).
 - 'Attachments' section with a link to 'Dispute Documents for Review'.
- Right Panel:**
 - Buttons: 'Process Dispute', 'Close Case', 'Submit to Fraud', 'Save', 'Close'.
 - Image viewer for 'PC.jpg' showing a photograph of a damaged laptop.
 - Page indicator: 'Page 1 of 1...'.

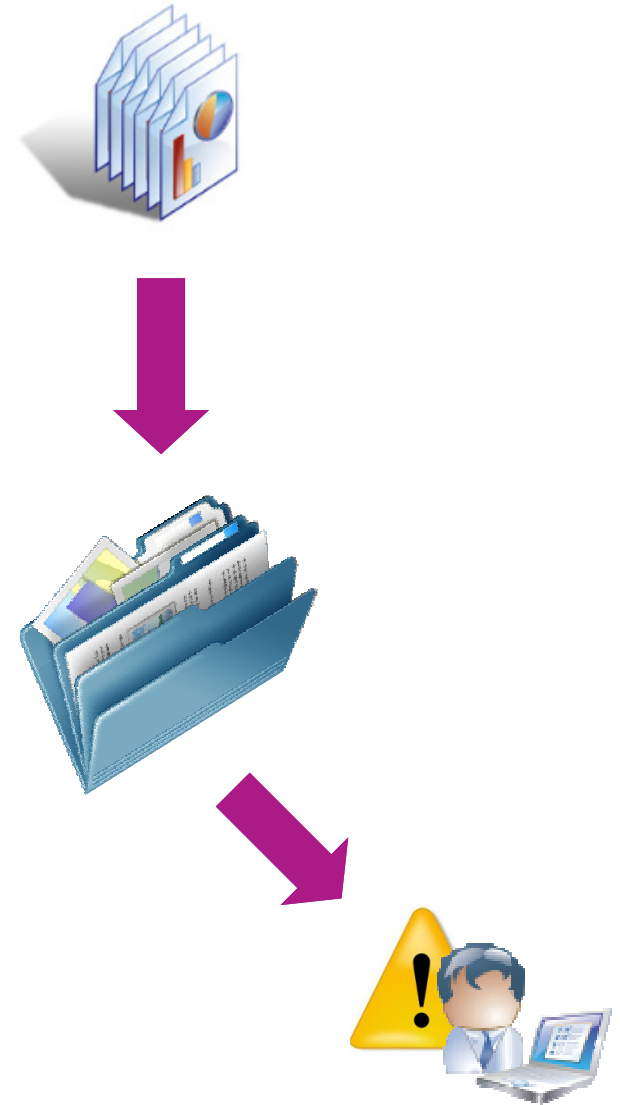
Fully Integrated Content Management

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



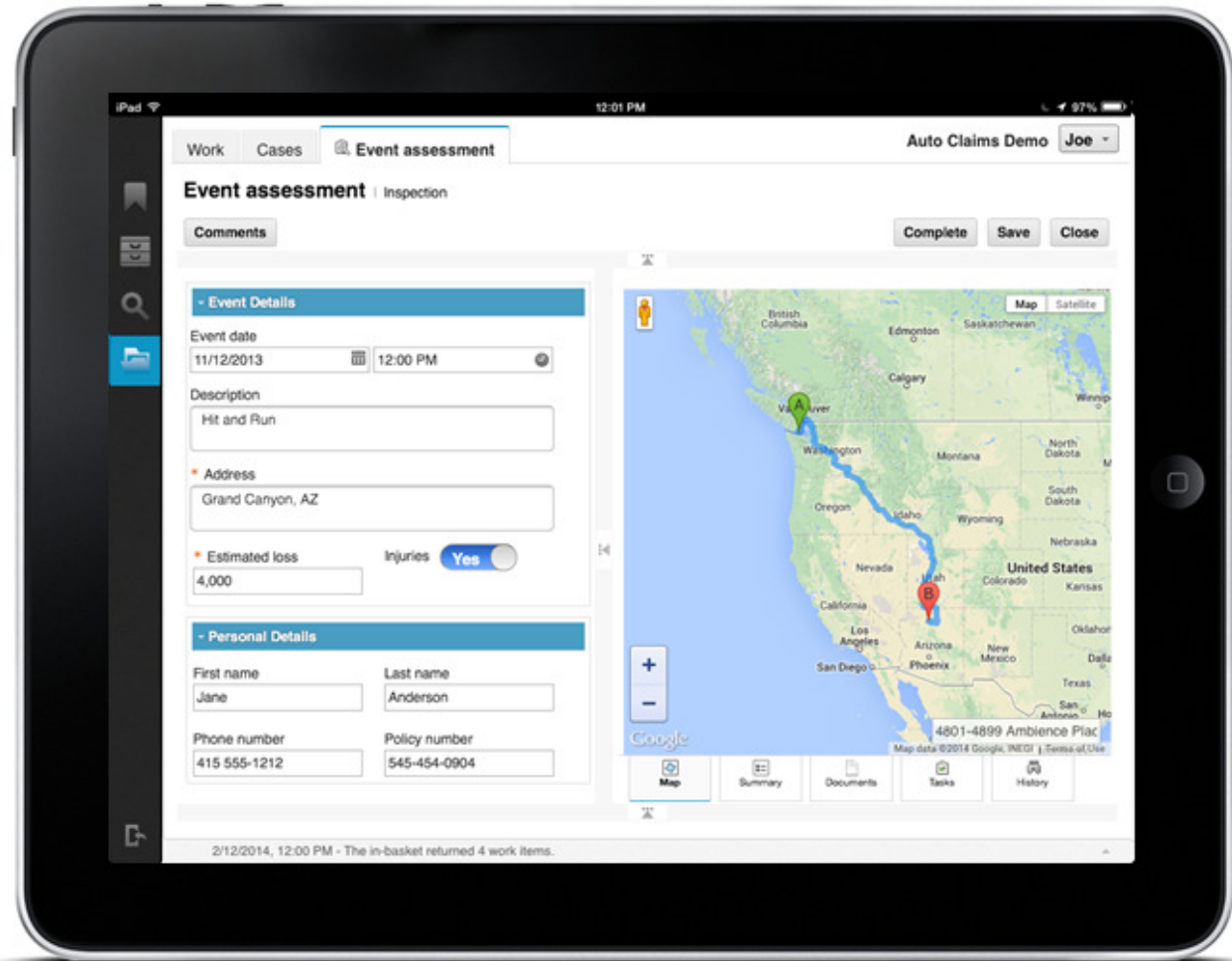
Active Content is Smarter Content

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



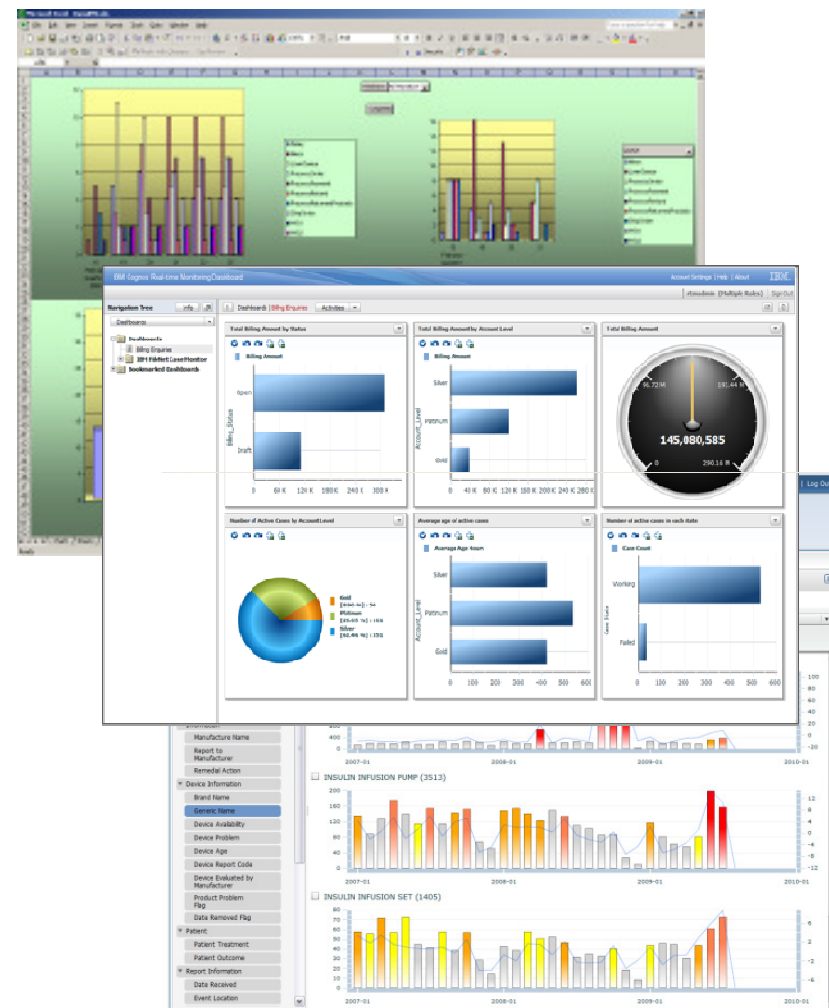
Case Mobile – Customized Work Details

- Part of the native Content Navigator iPad app
- Displays solution pages the way they were designed with mobile tweaks where appropriate
- No updates to app are required when case solutions are modified



IBM Case Manager – 3 Styles of Analytics

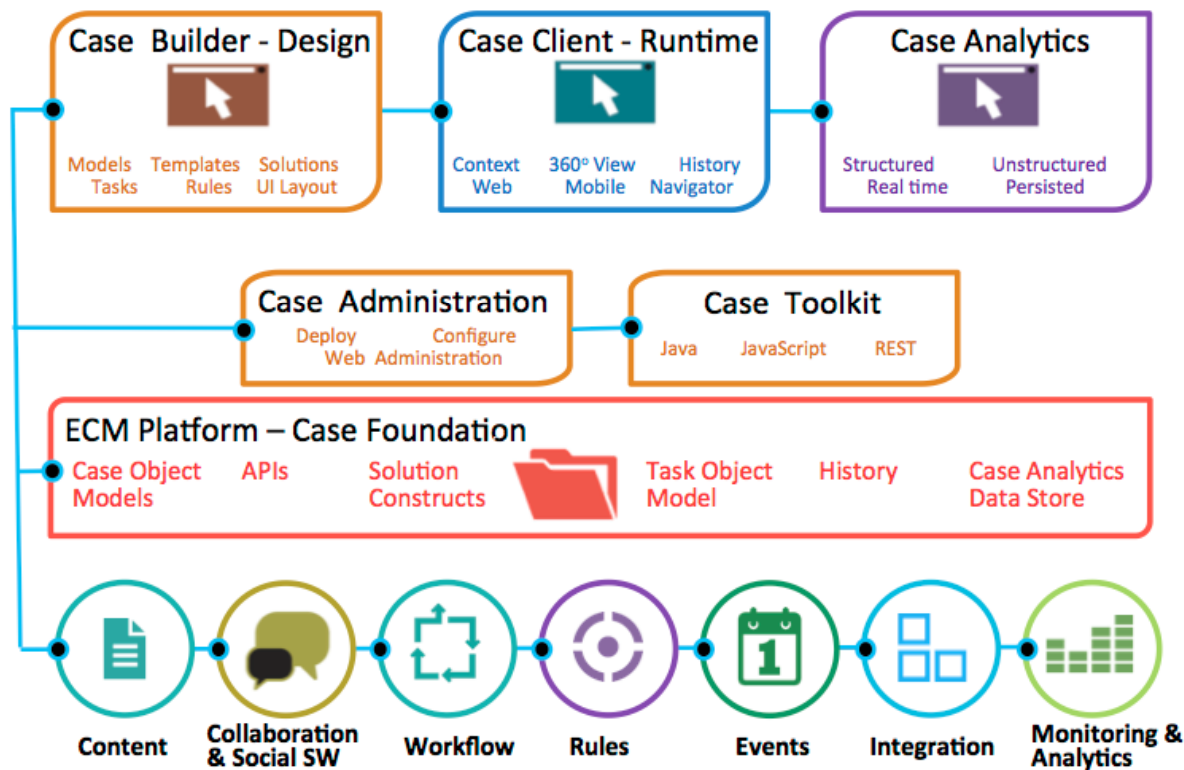
- Case Analyzer (Historical Reporting)
 - Excel and Cognos enable case and process analysis
 - Dynamic - Drill down, slice and dice, filter, etc
 - High performance, large volume analysis
- Case Monitor (Real Time Dashboards)
 - Cognos RTM provides real time cases monitoring
 - Threshold monitoring and alert generation
- Content Analytics
 - Crawl and index case contents and metadata
 - Discover patterns, trends and insights across cases. Example : Most common compliant in user comments in cases



How do you create a new case solution?

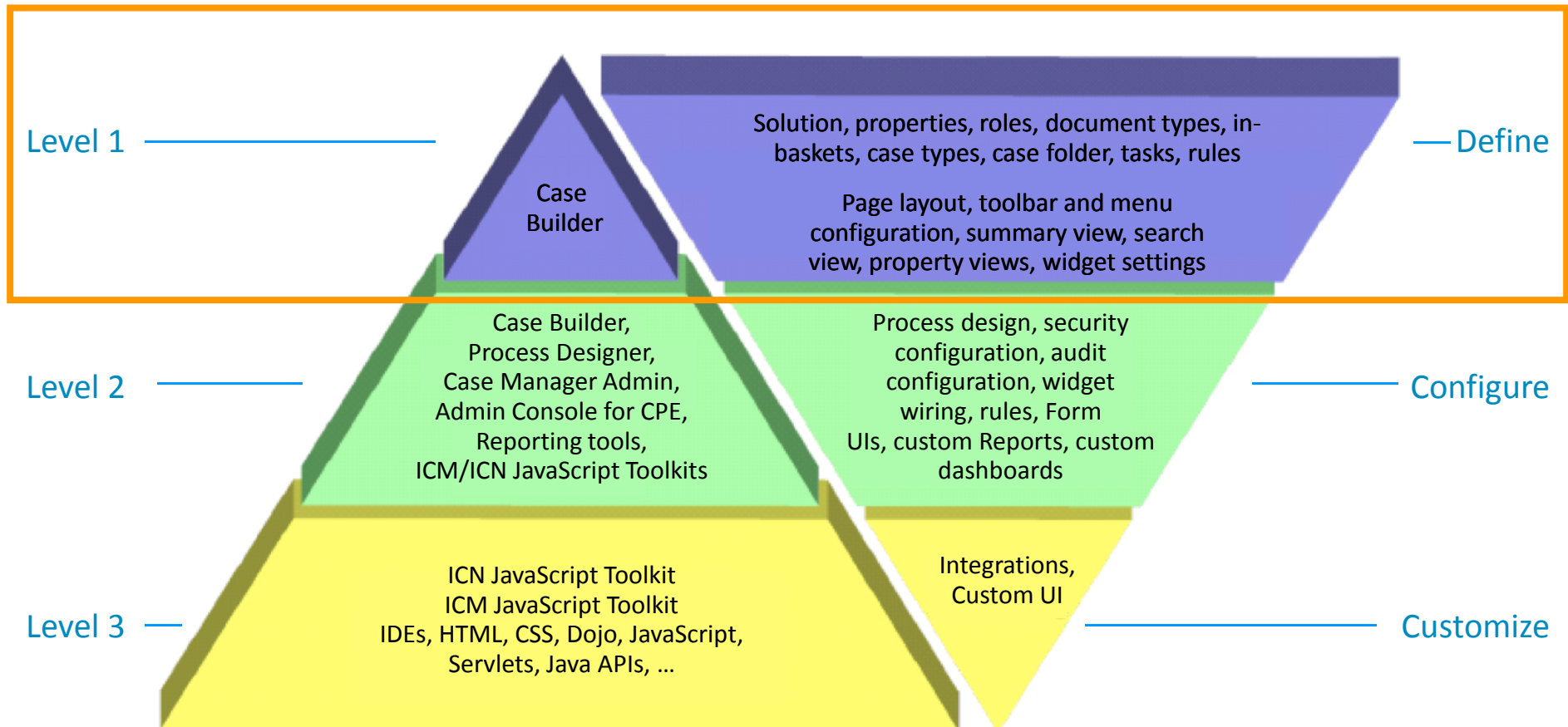
IBM Case Manager

Key Components Included



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

Levels of Design and Associated Effort and Skills



Case Builder: Rapid Solution Development

IBM Case Manager Builder

Manage Solutions \ Superbank Front Office

Superbank Front Office

Superbank with CCD

Solution prefix: DP109

Created by Intgpeadmin

Created on 23 August 2013

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

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

CSR Tasks

In-basket General

In-basket Filters

Roles associated with this in-basket: Customer Service Representative

* In-basket Name: Description:

Select Property ▼

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

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

Case Builder: Case Types

IBM Case Manager Builder

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

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

Case Type Attributes

*Case type name:
Customer Complaint

*Case type unique identifier:
QC_ Complaint

Case type description:
Customer Complaint Management Application

Starting document type:
<None>

Enable case workers to create custom tasks

Default layout for Custom Task Details page:
Custom Task Details

Default layout for Add Case page:
Add Complaint Case

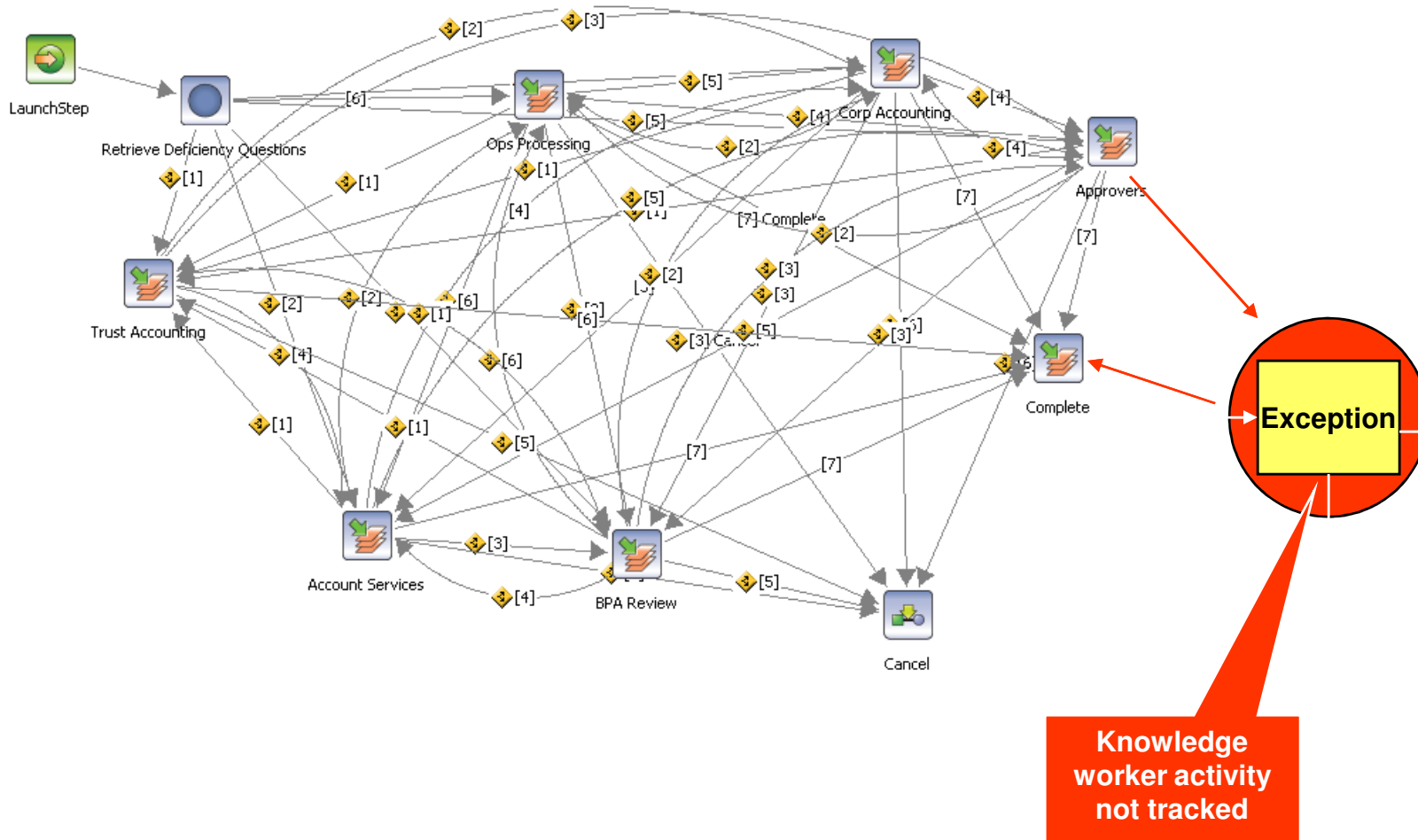
Default layout for Split Case page:
Split Case

Default layout for Case Details page:
Case Details

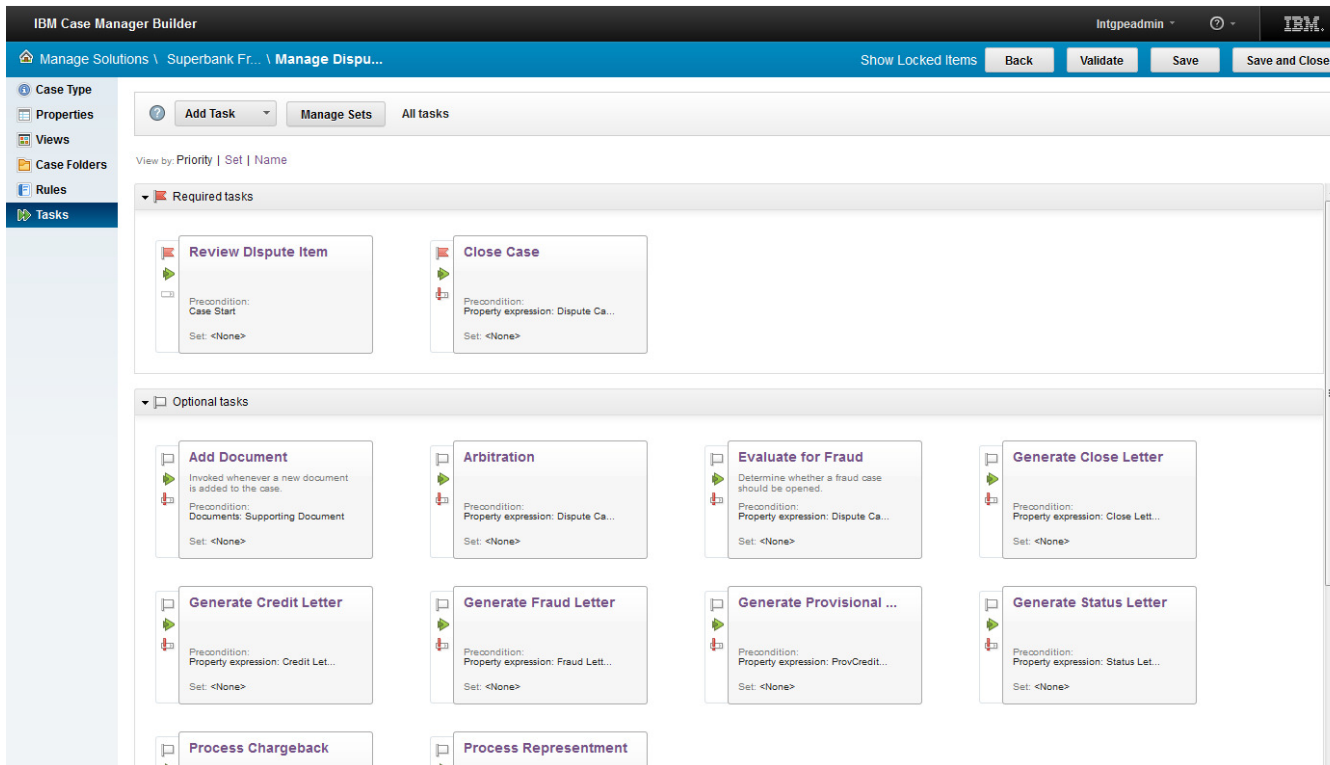
Override default case details page layout for:
Contact Center

▸ The Customer Queries and Complaints Management solution was opened.

Case Style Work Can Be Unpredictable

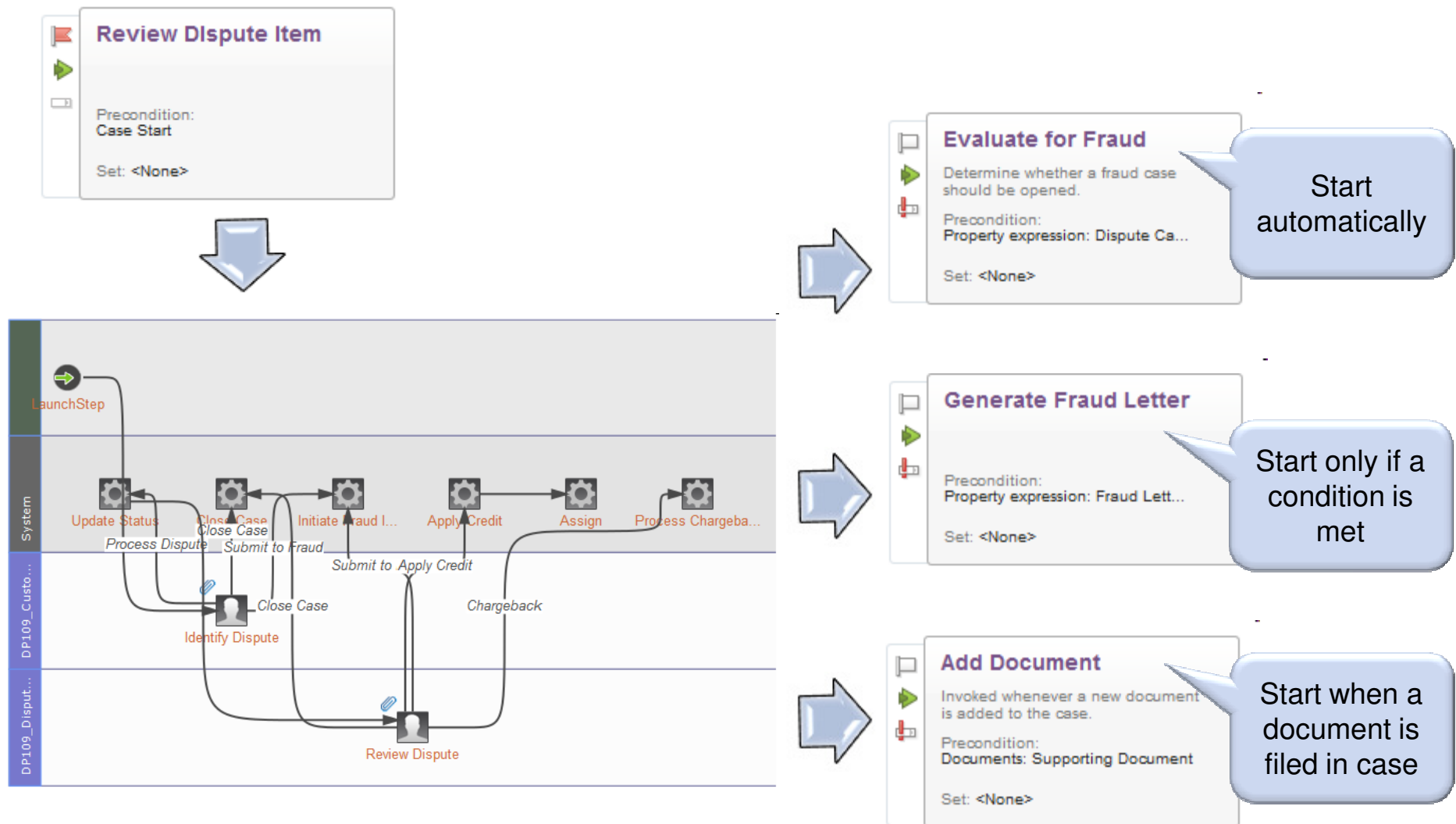


The Power of IBM Case Manager Tasks



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

Tasks and Dependencies



Solution Building 1, 2, 3

1

IBM Case Manager Builder
Manage Solutions | Superbank Front Office

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

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

Add Property | OK All

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

Customer Name
Name: Customer Status Type: String

Define Property Values
This property can have:
 A single value
 Multiple values
Default value: Silver

The Superbank Front Office solution was opened.

2

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

Edit | Copy | Remove | Deploy | Com

3

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

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

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

Documents | Tasks | History

Home

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

Customer Information

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

Transaction Details | Dispute Details

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

Timeline: 23 Aug 2013 18:00:00

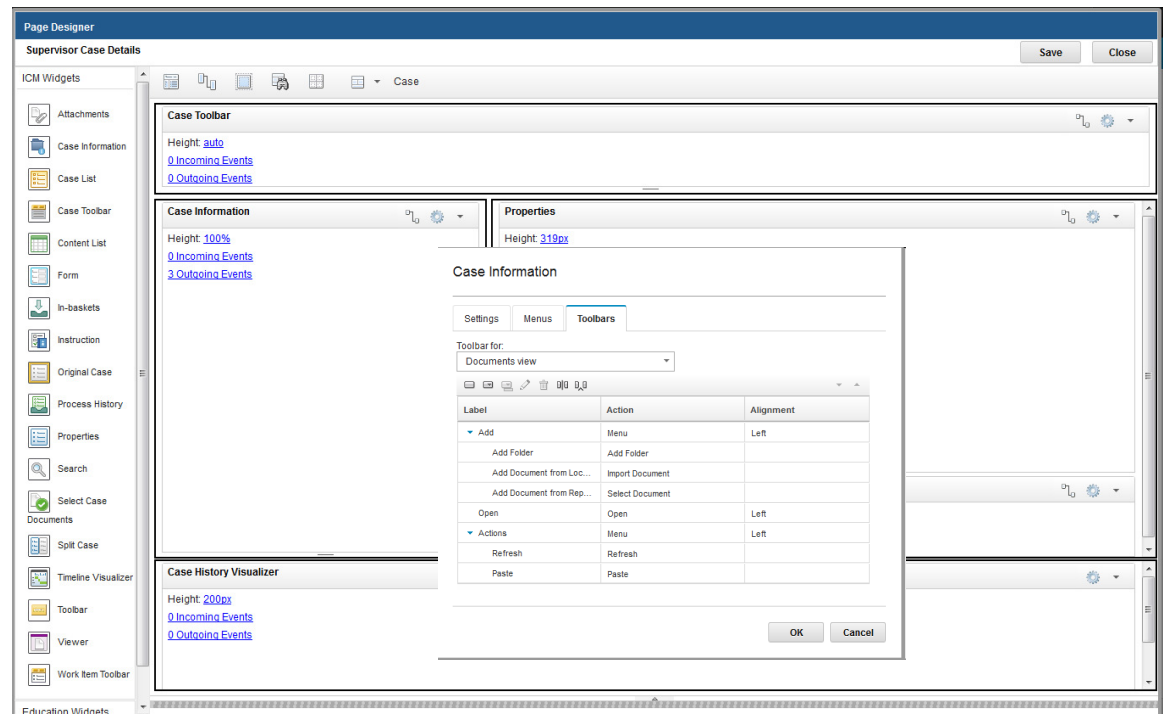
Smith.Bob-230813 Created on 23/08/2013 18:20

- 1 – Design
- 2 – Deploy
- 3 – Test

Customizing Your Solution Even More

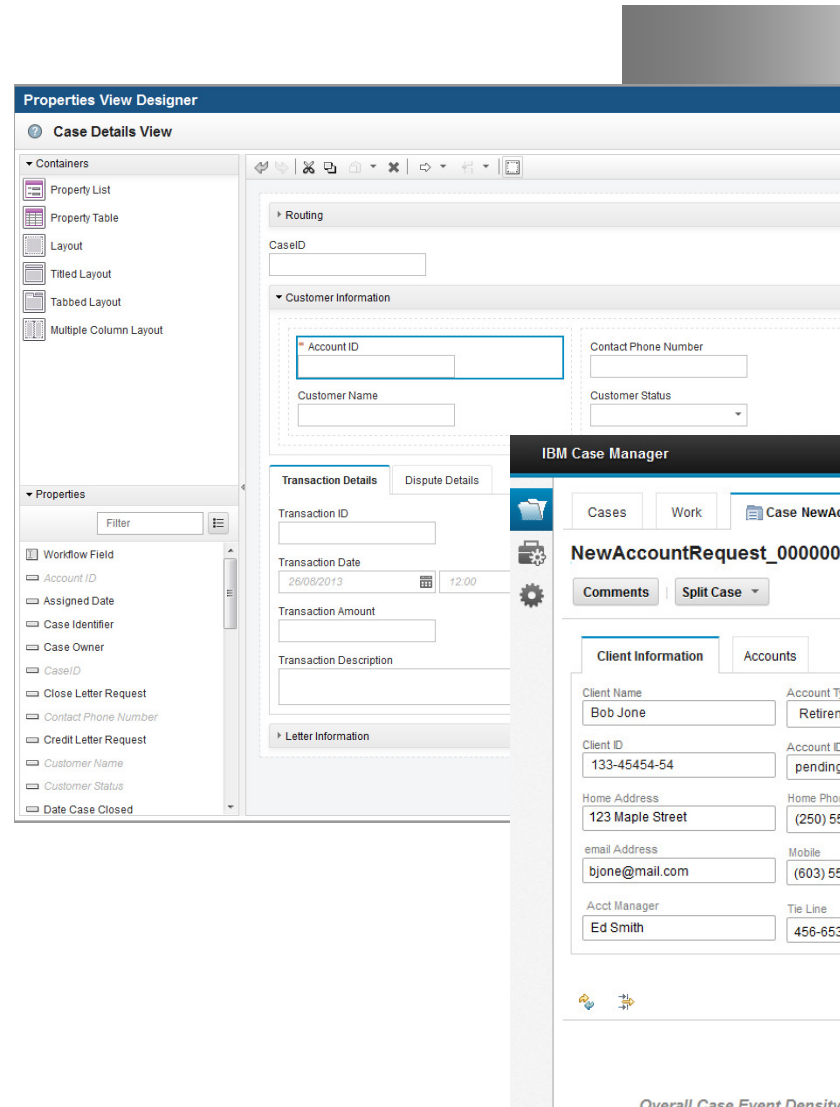
Integrated Page Designer

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

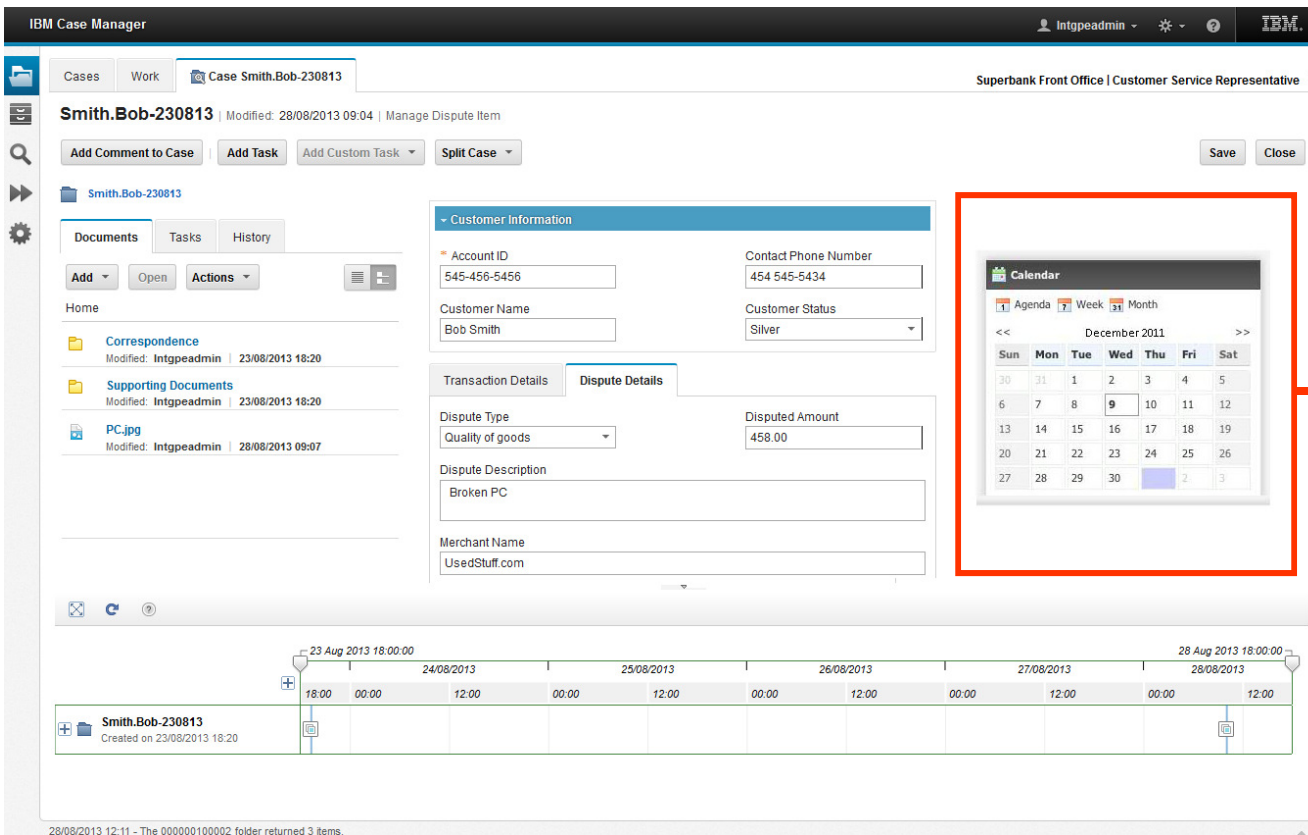


Integrated Data Layout Designer

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



Client Customization and UI Widgets



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

IBM ACM Partner Solutions

Make an organizational impact and minimize your risk by partnering with experts who understand your specific business challenges

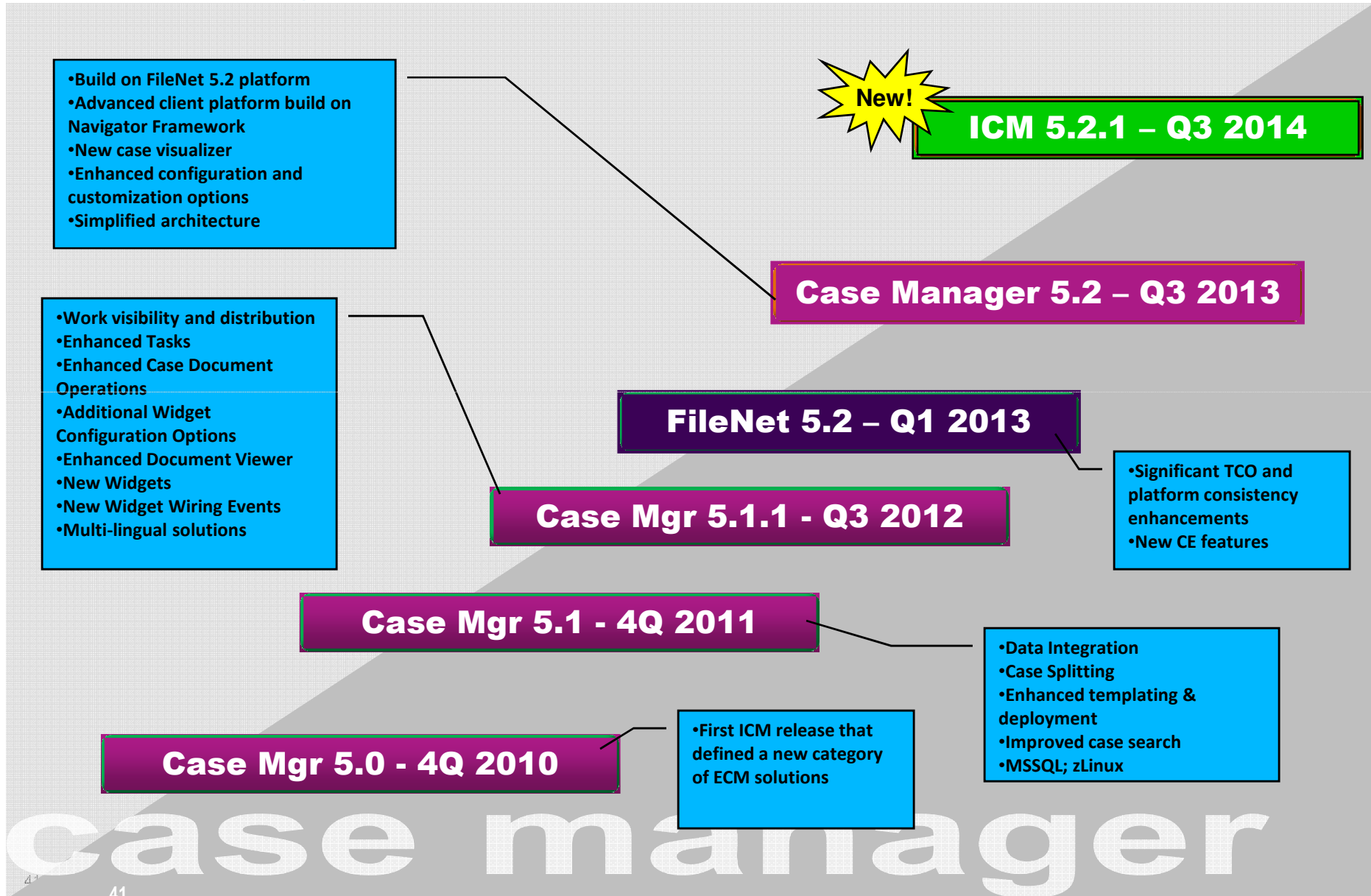
These line-of-business application solutions are built on the IBM Case Manager platform by partners with the industry subject matter expertise. These innovative, targeted solutions delivered by the ECM partners meet stringent requirements and generate tangible value. They span a wide variety of real world needs, such as:

- Patient care management - Healthcare
- Asset Protection (loss prevention) – Retail stores
- Asset/facility lifecycle management - Retail store location planning, opening/closing
- Vendor/supplier management
- Contracts Management - Cross industry
- Fraud investigation - Financial Services or Healthcare
- Injury Claims
- Loss prevention
- Child support disbursements payments
- Inmate tracking in prisons
- Pension administration
- Non profit administration
- Environmental compliance
- And many more!


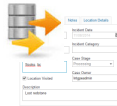










Accelerate2Value Partner Solutions



IBM Case Manager Releases



ICM 5.2.1 – September 2014

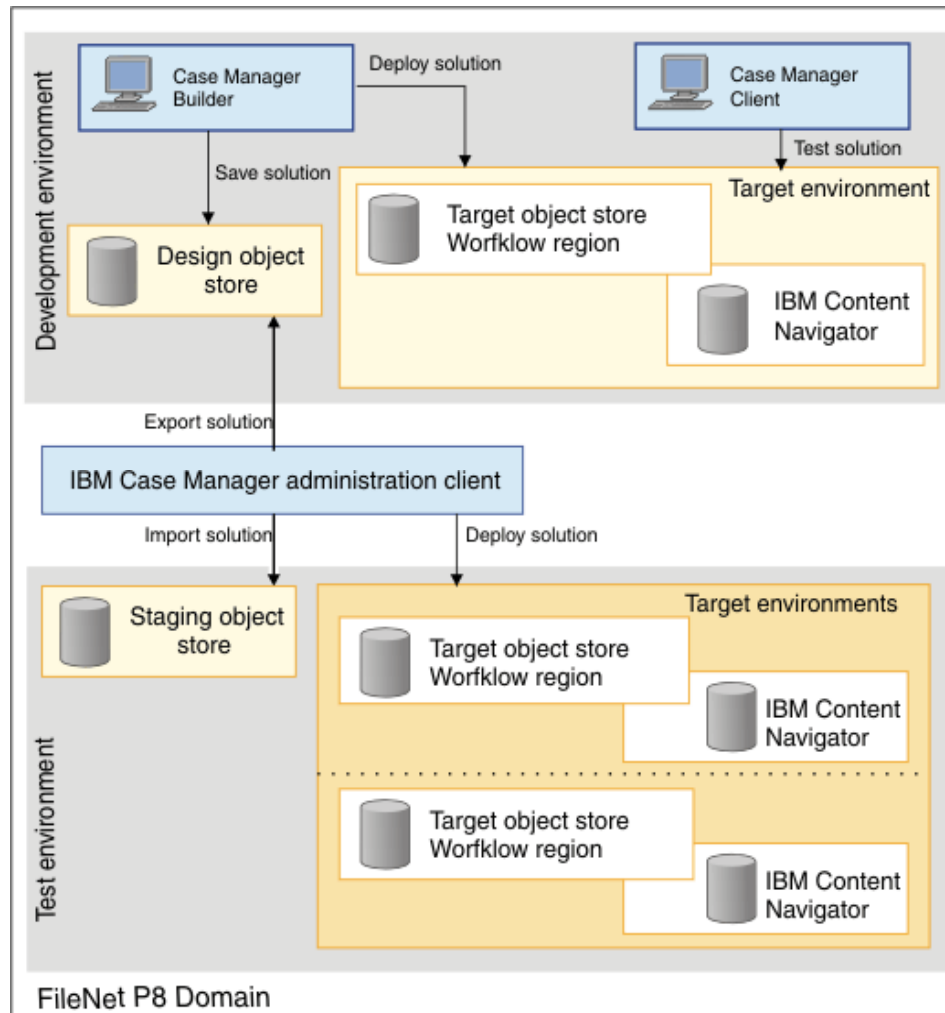
| | | |
|---|--|--|
|  <p>Include Content From Other Repositories</p> |  <p>Include External Data in Property Views</p> |  <p>Push In-baskets</p> |
|  <p>Task Properties</p> |  <p>To-do Tasks</p> |  <p>Additional Page Layout Configurations</p> |
|  <p>New APIs for Creating Custom Data Editors</p> |  <p>Social Information for Case Documents</p> |  <p>Zero Download Viewer Support</p> |
|  <p>Add Case Documents With Entry Templates</p> |  <p>File Tracking, Favorites and Desktop Sync</p> |  <p>Expanded Platform Support</p> |

Thank You!



Backup

Deployment Architecture / Model



Please note

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Performance is based on measurements and projections using standard IBM benchmarks in a controlled environment. The actual throughput or performance that any user will experience will vary depending upon many factors, including considerations such as the amount of multiprogramming in the user's job stream, the I/O configuration, the storage configuration, and the workload processed. Therefore, no assurance can be given that an individual user will achieve results similar to those stated here.

