A Walk-through of IBM Case Manager
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Enterprise Content Management

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Agenda

- **Case Manager Overview**

- Key Capabilities

- Demonstration

- Benefits

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Case Management is all about providing context to enable better outcomes

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

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

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

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

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

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

INSURANCE
- Customer
- Policy
- Underwriting
- Claim
- Annuity

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

HEALTHCARE
- Patient case
- Member
- Provider

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

ENERGY
- Rate case
- Claim
- Permit
- Land
- Property

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Advanced Case Management Strategy

Advanced Case Management

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

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

*people* o *process* o *information*

Business benefits

- Better business and IT collaboration to define solutions

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

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

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

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Case Manager Tasks

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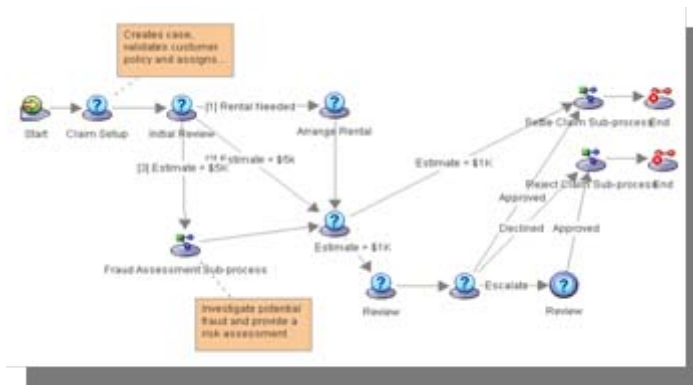
Participants can refine case tasks as they proceed

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

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

New tasks can be added to cases on the fly

Tasks can vary in complexity

Full Case Context

Documents

Forms

Correspondence

Receipts

Statements

History

Case Created

Document Added

Comment

Review started

Properties
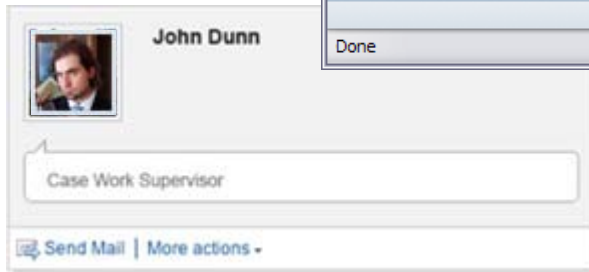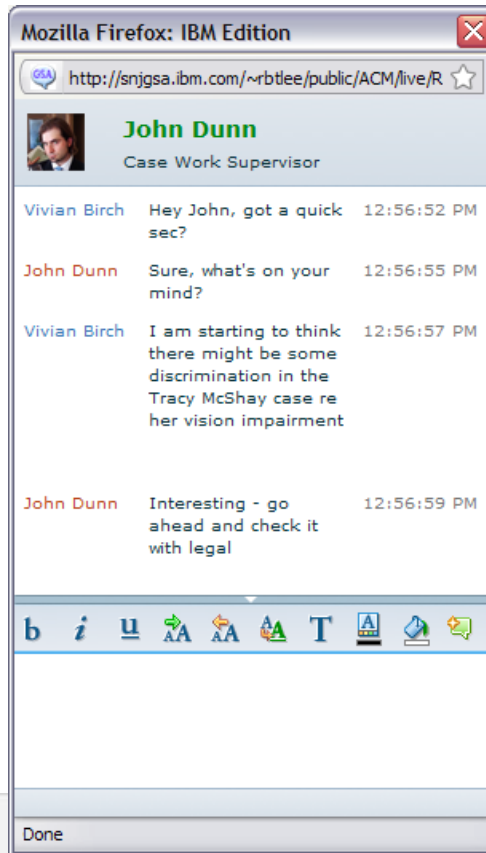
Customer Name
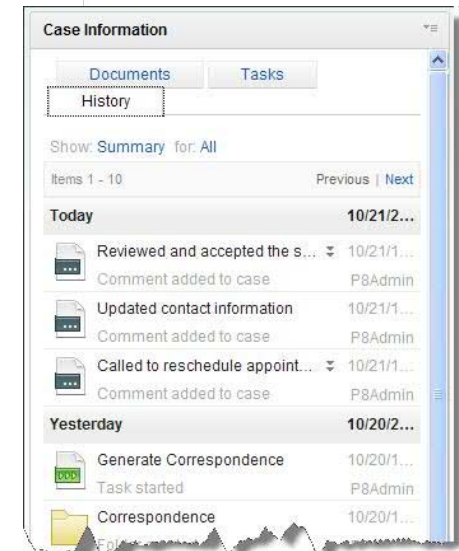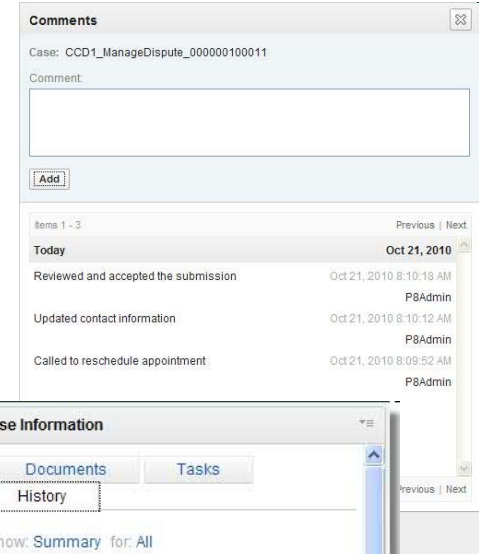
Priority

Transaction IDs

Account Number

Tasks

Initial Case Review

Email the Customer

Investigate Claim

Issue Refund

Cases are Collaborative

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

Shared comments and case history provide context

Cases are Dynamic

Case Information

Case ID: CCDM_ManageDisputeItem_000000100501

Documents   **Tasks**   History

Add Task

▼ Required (3)

Close Case

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

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

▼ Optional (9)

Add Document

Arbitration

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

Add Task ⊠

Activity type:
Review Case Details ▼

Activity name:
Review Case Details

OK   Cancel

Case Toolbar

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

Comments   Add Task | Close

Case workers can even add new Tasks to a case

# Business Rules Make Case Manager More Dynamic

Rule definition in natural language…

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

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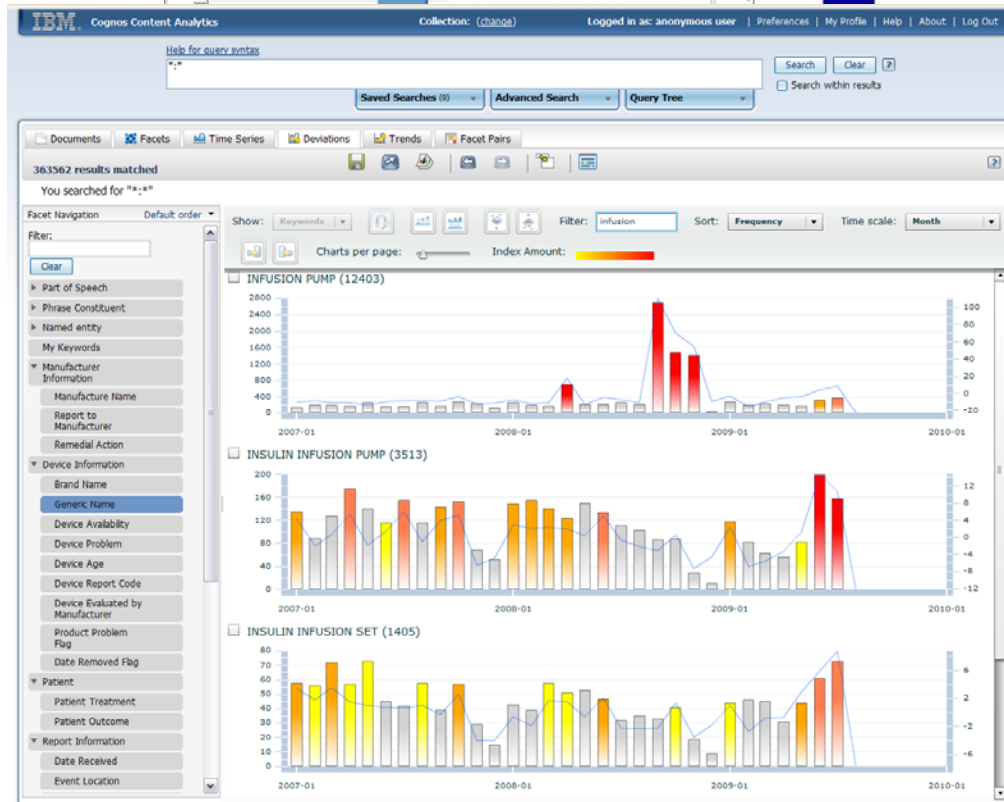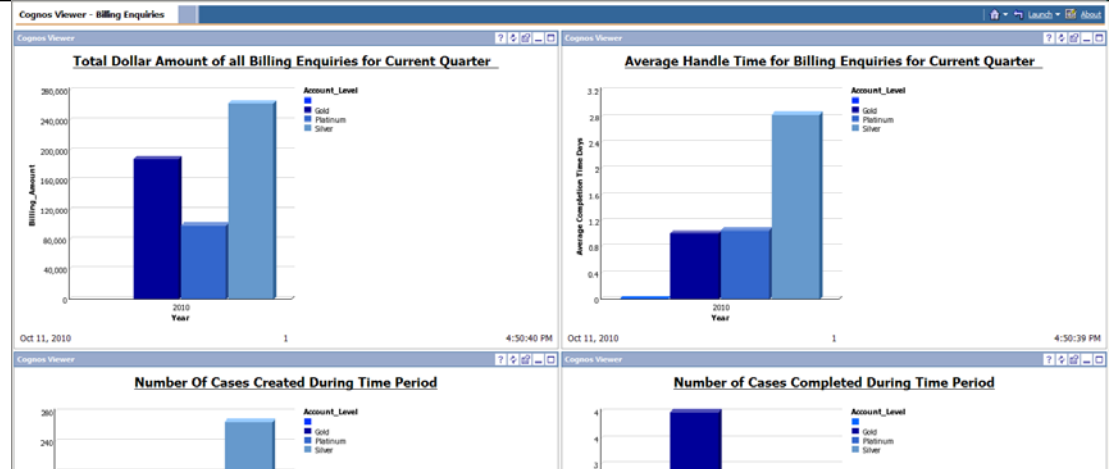
Rules can be changed at runtime, minimizing the need to re-deploy processes and solutions
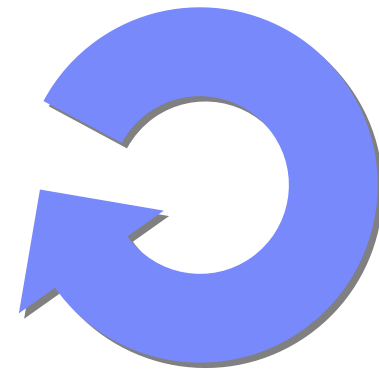
Case Analytics

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

- **review operational performance and**

- **determine the root causes of inefficiencies**

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File Edit View History Bookmarks Tools Help

IBM Case Manager Builder

IBM Case Manager Builder

P8Admin | Help | About | Log Out

⌂ **Manage Solutions**

Reset Test Environment   Refresh Solutions

Creating the solution

Select a template ▾   Add Solution
○ From a blank template   ☐ Use the wizard to define the solution

Credit Card Disputes
Solution for managing credit card disputes
Last modified by P8Admin on September 7, 2010

Edit | Open wizard | Deploy | Test | Remove

Unemployment Claims Process
Unemployment claims process management system
Last modified by P8Admin on September 12, 2010

Law Enformcement
Law Enforcement management solution
Last modified by P8Admin on September 12, 2010

Credit Cards JGD v2
description
Last modified by P8Admin on September 10, 2010

▶ The solution was saved and closed.

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- **Benefits**

Business benefits

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

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

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

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

Thank You!