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## Highlights

- Provides knowledge workers with a contextual environment showing all case documentation, case data and decision steps
  - Optimizes case outcomes with analytics tools that enhance insight, streamline workloads and accelerate time-to-value
  - Offers a business-focused design that allows more efficient presentation of case data
  - Provides a single overview of the state of the case, the tasks and steps being performed, and who is performing them
  - Features mobility-enabled capabilities that allow knowledge workers to interact with their cases remotely
  - Fully integrates with the IBM Content Navigator platform
  - Supports an upgrade path for IBM® FileNet® BPM and BPF customers
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# IBM Case Manager 5.2

*Improve case outcomes by empowering knowledge workers with up-to-date information to make selective decisions*

Many organizations struggle with the changing nature of casework, often having to do more with less—less time, less budget and less staff. IBM Case Manager 5.2 delivers a broad spectrum of ready-to-use capabilities that put information, analytics, collaborative tools and process controls into a single user interface. The result: organizations can work cases more efficiently and with better business results.

## Intelligent case management in a flexible, integrated framework

IBM Case Manager 5.2 helps companies work smarter by enabling them to extract more value out of their information—whether it's contained within a customer request, loan application, or complex industry or regulatory procedure. The software provides a flexible framework, a cohesive approach and integrated tools for managing cases, allowing organizations to work smarter while addressing auditability and regulatory requirements. It empowers caseworkers and knowledge workers to extract more value and insight from critical information, enabling them to make better and faster decisions on cases.

With IBM Case Manager 5.2, all case data, documentation, analysis and third-party applications are tied to a single case, customer or standard occupational classification (SOC) number. Case management components contained in IBM Case Manager 5.2 include a Content Navigator-based user interface environment; an easy-to-use design tool, IBM Operational Decision Manager (ODM)-based business rules; and a defined case-object model. Add newly enhanced mobile capabilities, and you have all the information, analytics, collaboration tools and process controls that knowledge workers need to drive timely, accurate case management and resolution.



## **Features and benefits of IBM Case Manager 5.2**

With the extended capabilities of IBM Case Manager 5.2, organizations benefit from an integrated, holistic approach to case management and gain greater case-centricity in a highly streamlined and simplified environment.

### **Flexible frameworks and templates accelerate time-to-value**

IBM Case Manager 5.2 provides an extensible infrastructure that enables organizations to address their specific business requirements. Users can capture best practices in built-in frameworks and templates composed of case management elements—such as data models, process models, user-interface components, rule sets and case configurations—that can accelerate deployment and shorten time-to-value. Equally, business analysts can quickly develop their own templates as well as create complete case management applications to address specific industry and customer needs.

### **Case analytics deliver improved insight and enhanced decision making**

Knowledge workers can use the tools provided in IBM Case Manager 5.2 to derive deep insight from the artifacts related to a case, including both structured and unstructured information. This insight can optimize casework at micro and macro levels.

In Version 5.2, a case visualizer provides a single overview of the state of the case, the tasks and steps that are being performed, and the person doing them. It also provides a visual history of when certain case events occurred and what actions were taken. With this information, managers can take proactive measures to improve performance, such as reallocating work, involving more subject-matter experts, adding more supporting case information and enhancing training.

### **Enterprise content management boosts customer service**

IBM offers transformational capabilities that extend customer service well beyond traditional definitions of the contact center and self-service.

IBM Case Manager 5.2 can leverage the IBM Enterprise Content Management (ECM) portfolio for content integration and federation. By building the IBM Case Manager offering on the Content Navigator framework, users benefit from the application's improved usability and consistency across other ECM applications, as well as streamlined access to both cases and general content management. In addition, IBM Case Manager 5.2 can import content from practically any source—from Microsoft SharePoint and EMC Documentum files to emails, call-center transcripts, images and more—and include it in a case file. Having customer information accessible in one central location enables knowledge workers to quickly respond to customer inquiries and resolve cases faster, based on a comprehensive view of the customer.

IBM Case Manager can deliver innovative capabilities that allow your organization to gain deeper customer understanding and more effective and orchestrated engagement throughout the customer service lifecycle. By facilitating rapid interaction and investigation in the resolution of complex events, it lowers the barriers to meaningful client engagement by providing timely, accurate and personalized responses to customer inquiries. These capabilities boost customer service and deliver compelling customer engagement.

Finally, leveraging the entire IBM ECM platform, cases can be automatically declared records and be managed with full compliance rules through integration with IBM Records Manager.

### Agile design capabilities offer flexible, efficient case management

Business analysts can use IBM Case Manager 5.2 to quickly assemble dynamic, case-oriented applications from existing components and rapidly deliver them to users. An integrated case designer facilitates efficient presentation of case data without having to use complex external tools. It supports data views that can include columns, sections and even separate tabs. The designer also includes a table layout container that provides a new way to group multi-value properties into related rows of data.

### Effectively manage business change and meet regulatory demands

IBM Case Manager 5.2 incorporates business-rules authoring directly in the design environment, effectively allowing process designers to easily incorporate rules into process management. An ad hoc task feature also allows caseworkers to define a sequence of actions that need to be performed on a case using an intuitive natural language-like editor. Caseworkers can then reuse these ad hoc tasks on other cases within the solution, enabling them to work within the case context, maintain case history and audit events.

### Configuration flexibility improves productivity

Solution designers with IBM Case Manager can define case tasks that were previously implemented by IBM Business Process Manager and managed in IBM Process Center, enhancing overall productivity. In-basket work list filtering allows simplified selection of choice list values and the ability to enter multiple values for OR style filtering (value A or value B). In-basket column values are immediately synchronized with case property values to ensure they always display the most current data.

### IBM software for comprehensive case management

The IBM Case Manager offering leverages and integrates a portfolio of IBM technologies to deliver a broad spectrum of capabilities:

- **IBM Content Navigator Framework** provides a unified user experience with the rest of the IBM ECM portfolio, enables mobile applications (iOS) and provides a DOJO-based environment for advanced web-based interfaces.
- **IBM Case Foundation** provides the core case infrastructure, including unified content and process capabilities for case management, as well as text mining, content integration and federation with IBM and third-party repositories.
- **IBM Content Analytics** enables users to search, discover and perform analytics on structured or unstructured case artifacts. Trend analysis, pattern detection and anomaly highlighting help facilitate smart case decisions.
- **IBM Sametime®** delivers unified communications and collaboration software for voice, data and video.

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### IBM Case Manager 5.2 bundle specifics

IBM Case Manager includes the following tools:

- IBM Case Manager Builder
- IBM Case Manager Client
- IBM Case Manager API
- IBM Case Manager Administration Client

The following applications are integrated and bundled with IBM Case Manager:

- IBM Sametime Entry\*
- IBM Content Analytics\*
- IBM Cognos® Real-time Monitoring\*
- IBM Case Foundation (IBM FileNet Content Manager 5.2, IBM Case Analyzer, IBM Cognos Real-time Monitoring,\* a limited version of IBM WebSphere® Application Server and IBM DB2®)
- IBM Navigator Framework

Fully integrated enterprise content management platforms:\*\*

- IBM FileNet Content Manager
- IBM Content Manager Enterprise Edition

\* Limited-use license terms.

\*\* Many additional platforms are supported through content federation.

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## About IBM Enterprise Content Management

IBM ECM solutions help organizations harness the value of unstructured information for new insights and better business outcomes. Organizations that discover, recognize and act on the most relevant content can achieve breakthrough results. By putting the right content in motion—capturing, activating, socializing, analyzing and governing—organizations across all industries can transform their business with informed, timely decisions. More than 13,000 organizations around the world are succeeding with smarter content solutions from IBM.

### For more information

For more information about IBM Case Manager 5.2 software, please contact your IBM representative or IBM Business Partner, or visit: [ibm.com/software/advanced-case-management/case-manager](http://ibm.com/software/advanced-case-management/case-manager)

For more information about IBM Content Navigator, visit: [ibm.com/software/products/us/en/content-navigator](http://ibm.com/software/products/us/en/content-navigator)



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