

# Drive successful case outcomes through streamlined workflow management



*Update existing investments with IBM Case Foundation and IBM Case Manager*

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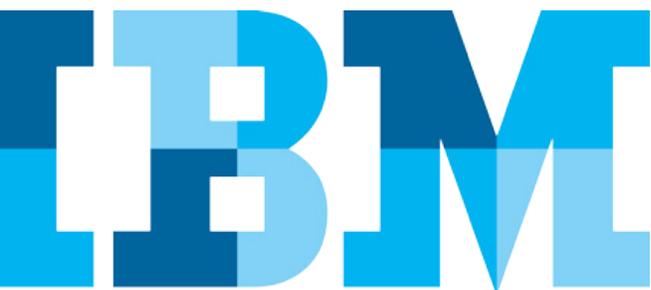
## Highlights

- Update and extend your existing IBM® FileNet® solution to meet today's case-oriented challenges
  - Help employees make better decisions while facilitating insight, responsiveness, flexibility, customer service and regulatory compliance
  - Provide knowledge workers with case management capabilities designed to accelerate time-to-value
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Many organizations have achieved varying levels of process automation and improvements using IBM FileNet Business Process Manager software. Now, organizations can increase flexibility and lower costs with the release of IBM Case Foundation V5.2, formerly IBM FileNet Business Process Manager. Case Foundation enables organizations to create, manage and optimize case-based processes to help boost process performance, reduce cycle times and improve productivity and decision making.

As its name implies, Case Foundation provides the groundwork for content-based case management. It serves as an integrated task and business process management platform for Case Manager.

Together, Case Foundation and Case Manager anchor a case management strategy that helps optimize case outcomes. The case management approach from IBM unifies people, processes and information to provide a 360-degree view of the case. This full awareness of context helps workers extract value out of information for better decisions and enables organizations to improve insight, responsiveness, flexibility, customer service and regulatory compliance. It also enhances knowledge workers' agility, enabling them to add or change actions or to make decisions as required to achieve the desired results.



Version 5.2 further enhances the case management capabilities with features designed to reduce total cost of ownership (TCO) and simplify administration. These include:

- Consolidation of Process Engine and Content Engine capabilities into a single Content Platform Engine that operates on Java Enterprise Edition, boosting performance and streamlining installation and deployment
- Improved services for multiple databases and component management through the Content Platform Engine
- Expanded IBM Case Monitor and IBM Case Analyzer capabilities that result in greater flexibility and reduced costs:
  - IBM Case Monitor now also reports on historical data as well as in-flight processes
  - The Case Analyzer database may be published to Oracle or IBM® DB2® databases in addition to Microsoft SQL Server
- Simplified administration tools for easy installation, configuration and deployment

### **Gain additional business value by updating your existing investments**

Case Foundation can help you manage your content and automate structured business processes to:

- Improve efficiency by automating and optimizing key areas of your organization through the use of timely, accurate information
- Manage assorted information, analyze potential paths and make decisions to achieve desired outcomes
- Facilitate governance for each step of a business process and its supporting information

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### **Case-driven processes**

You may not use the term “case,” but your organization may have several processes that are managed as cases: a contract, customer, lawsuit, incident, invoice, application and more.

So what makes a case a case? It’s a content-rich workload that requires management and influences decision making. Here are a few examples:

Account changes	Grant management
Agent onboarding	Incarceration and parole management
Benefit disputes	Incident management
Benefit installation	Loan origination
Claims adjudication	Patient cases
Commercial member enrollment	Permit approvals
Complaint tracking	Rate case applications
Court cases	Taxpayer complaints
Credit card fraud investigation	Underwriting
Diagnosis and health management	Wealth management

## Power up your case management strategy

By combining Case Manager with Case Foundation, you extend your content management solution to meet today's case management challenges. Case Manager offers a simple, template-based way to create and deliver a wide variety of industry-specific case management applications. Templates give business users control of developing, editing and operating case-based solutions. As a result, IT groups can focus on core tasks, while business users can design and deliver their case-based solutions quickly.

By focusing on business-user design and delivery, case-based solutions can address complex business processes—building on the automation of prescriptive process elements while optimizing operations that demand dynamic tasks and human decisions to achieve ideal outcomes.

## How to extend your IBM ECM investment

To take advantage of the value provided by Case Foundation and Case Manager, follow these steps:

1. Establish currency with the latest IBM enterprise content management (ECM) platform
2. Perform an in-place or migration upgrade of FileNet Business Process Manager software to Case Foundation V5.2
3. Team with IBM for a free design workshop and then launch a Quick Win Pilot to highlight the value of Case Manager for your organization
4. Add Case Manager to help empower business users and significantly shorten time-to-value
5. Include additional ECM starting points to meet your business imperatives, such as production imaging, information lifecycle governance, social content management and content analytics
6. Leverage extended business process management capabilities from IBM

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## Case Foundation in action

- **An insurance company adds IBM Case Manager to IBM Case Foundation and achieves dramatic productivity gains by making its claims processing more flexible and dynamic.**
- **A leading US mortgage lender implements IBM Case Manager, helping it reduce time to close loans, increase profitability and grow marketplace share by creating adaptable processes for mortgage processing, underwriting, closing and investor delivery.**

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With Case Foundation as the base platform for Case Manager, a case management strategy from IBM can deliver the following benefits:

- **Faster time-to-value:** Employs templates to promote reuse, reduces time required for solution design, significantly simplifies solution development, and breaks down barriers to give direct control of an organization's processes to the line of business
- **Improved decision making:** Applies externally managed business rules, which increase efficiency up to 10 percent<sup>1</sup> to align decisions with business objectives and retain design flexibility
- **Integrated ad hoc processes:** Combines structured processes with dynamic task creation and management to address almost any situation and reduce complexity
- **Better collaboration:** Offers in-line collaboration to help workers find the people they need when they need them for reaching faster and better outcomes
- **Enhanced visibility:** Illustrates progress toward business outcomes and helps improve efficiency by up to 10 percent<sup>2</sup> through integrated analytics
- **Automation and governance:** Leverages innovative active content capabilities to automatically initiate cases based on business information and events, retain decision audit trails, and simplify lifecycle governance for associated information and actions

## Optimizing case outcomes while minimizing the burden on your IT organization

Case management depends on flexibility, responsiveness and in-context information delivered at the right time and in the right format. IBM Case Foundation provides the dynamic tasks, and the easily created and modified reusable templates that help extract value from information and streamline processes. Plus, its consolidated base infrastructure—along with shared services—helps reduce IT costs. Working in tandem with IBM Case Manager, Case Foundation enables workers to include existing content from any repository in their case solutions, and augments existing process automation to help organizations address cases more efficiently and accurately.

### For more information

To learn more about IBM Case Foundation and IBM Case Manager, contact your IBM representative or IBM Business Partner, or visit:

- [ibm.com/software/products/us/en/case-foundation](http://ibm.com/software/products/us/en/case-foundation)
- [ibm.com/software/advanced-case-management/case-manager](http://ibm.com/software/advanced-case-management/case-manager)



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IBM Corporation  
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Produced in the United States of America  
September 2013

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<sup>1,2</sup> Based on IBM experience.



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