Case Analytics

Smarter software for a smarter planet

Information Management
Business Analytics delivers insights to drive better outcomes
Comprehensive Reporting and Analysis

Measure business SLAs accurately and optimize efficiency through data capture and reporting across client services case workloads and underlying processes.

Improve case outcomes and understand performance more clearly through an integrated set of historical and real time analytics, dashboards, and reports, all of which are easily customizable.

Determine the best solutions (or possibly prevention) for cases through the use of content analytics, gaining insight through case content.
Case Analyzer

- Historical trend analysis
- Dynamic analysis (drill down, slice and dice, filter, etc)
- Provides Excel and Cognos BI reports to enable case and process analysis
- Based on Online Analytical Processing (OLAP) technology to support high performance dynamic queries on large data sets
Case Analyzer

- **Case level reports**
  - Current number of current cases
  - Average age of current cases
  - Time spent to complete cases
  - Number of cases created
  - Number of cases completed
  - Number of active cases

- **Task level reports**
  - Average age of current tasks
  - Average time in each state for current tasks
  - Average time spent to complete tasks
  - Average time in each state for tasks
  - Number of tasks created
  - Number of tasks completed
  - Number of tasks in progress
Key customer challenges driving the need for real-time visibility

1. Data is often stale or late for time-sensitive decisions

2. Long lag times waiting for information from data loads for reporting

3. Difficult to combine & aggregate data from multiple operational sources, real time

4. Manual processes and actions lead to longer time to act

5. Reliance on IT & other specialists to custom build or code for real time needs
Real-time operational decision making

Monitor Business Operations

- Continuously monitors in background and alerts when exceptions occur to take immediate action
- Detect events & patterns as data streams flowing through transactional & messaging systems
- Aggregated information in real-time across multiple transactional systems and data sources
- Enable self-service with user-defined business dashboards, operational KPIs, alerts
- Complete decision management loop from monitor to insight to corrective action

Without Monitoring

Cognos Real-time Monitoring Enabled
IBM Content Analytics (ICA) for unstructured case analytics

- Content Analytics delivers **new business understanding and visibility** from the content and context of unstructured information.
- Leverages the information in case documents and comments to expose new business insight:
  - Identify textual patterns across cases.
  - Identify how frequently textual patterns occur across cases.
    - For example: What is the most common complaint in user comments.
  - Identify correlation between cases.
  - Derive, report, and act on insights.
Case Analytics

• Case Analyzer (Historical Reports)
  – Provides Excel and Cognos BI reports to enable case and process analysis
  – Dynamic analysis (drill down, slice and dice, filter, etc)
  – Historical trend analysis
  – Based on Online Analytical Processing (OLAP) technology to support high performance dynamic queries on large data sets

• Case Monitor (Realtime Dashboards)
  – Integration components that are imported into a Cognos RTM 10.1 environment to provide real time monitoring of cases and processes
  – Threshold monitoring and alert generation
  – Real time dashboards for current data (no historical data)

• Content Analytics (Interactive Content-based Analysis)
  – Crawling and indexing of case contents and metadata
  – Discovers trends and anomalies across cases
  – How frequently do textual patterns occur across cases
    • e.g. most common compliant in user comments in cases

  • OOTB Dashboards such as
    • Average age of current cases
    • Time spent working on cases or waiting on activities
    • Average processing time of currently active cases
Drill down into information related to each process to understand performance relative to KPIs.

Analyze both historical and real time data related to case processing through reports or dynamic dashboards.

Employ any properties associated with cases to determine whether specific SLAs are being met.

Establish thresholds, timers, due dates, alerts, notifications, and other mechanisms to ensure that cases are handled as expediently as possible.

Examples of Thresholds:

- Number of activities with total time exceeding time limit
- Number of activities with wait time exceeding time limit
- Number of activities with processing time exceeding time limit
Why Use Analytics

- Monitor and manage your business process
  - Monitor and manage the day-to-day business operations
  - Use historical trend information to adjust future operations if needed
- Discover new business patterns and trends
- Identify new business opportunities
Why Use Analytics (cont.)

- New offerings specifically targeting cases
- IBM Content Analytics (ICA) provides a new Case crawler specifically targeted at analyzing the content associated with cases
- Case Analyzer provides tools for monitoring cases
  - Ensuring that operations are working efficiently and effectively
  - Report dashboard tells you what’s going on, so you can review volumes, bottlenecks, etc.
  - Trend analysis supports planning based on historical case data
Analytics Components

- Included with IBM Case Manager
  - Case Analyzer
  - Case Monitor
  - Cognos RTM
  - IBM Content Analyzer (ICA)

- Not included with IBM Case Manager
  - Cognos BI
Case Analyzer

- Case Analyzer includes all of the functionality of the former Process Analyzer as well as new functionality for analyzing cases and tasks
- Reads data from both PE and CE event logs
  - Data from both sources is published to a common Case Analyzer database
- New fact tables and cubes are created to store metrics related to cases and tasks
High Level Design

Process Engine
- Events
  - PE Event Logs

Content Engine
- Events
  - CE Audit Log

Case Analyzer
- Event Dispatchers
- Publishers

SQL Server
- Case Analyzer OLAP Database
  - Build OLAP cubes
- Case Analyzer Database

Reports and Dashboards
- Report Data
  - Excel and Cognos BI Reports
  - Case Monitor Dashboards (BAM)
IBM FileNet Case Monitor

- IBM FileNet Case Monitor integrates with Real Time Monitoring (RTM)
- IBM Case Monitor was previously called FileNet Process Monitor (and before that Business Activity Monitor (BAM))
- FileNet Process Monitor integrated with Cognos Now!
- Cognos Now! is now called Real Time Monitoring (RTM)
Case Monitor Overview

- Set of integration components that are imported into a Cognos RTM 10.1 environment to provide real time monitoring of cases and processes
- Includes all of the functionality of the former FileNet Process Monitor as well as some new dashboards for monitoring IBM Case Manager cases and tasks
New Dashboards – Case Level

- Number of active cases
- Number of active cases in each state
- Average age of active cases
- Bucket examples: number of cases that are older than a week, a month, etc...
- Threshold examples; for example, Number of cases that have exceeded time limit
New Dashboards – Task Level

- Number of active tasks
- Number of tasks in each state
- Average age of active tasks
- Average time in current state
- Bucket examples: number of tasks older than a week, month etc.
- Threshold examples; for example, Number of tasks with total time exceeding the limit
Q & A