

Case Management with Oracle BPM

Accelerated Case
Management
powered by
Oracle



Summary

This document gives an overview of our Capgemini assets on how we deal with Case Management in a complex and heterogeneous environment. This accelerator has been developed based upon Oracle Technology, which enables fast delivery with strong integration capability.

Case Management with Oracle BPM

Organizations increasingly need to deal with unstructured processes that Business Process Management Suites are not designed to cope with. Case Management is a way to govern and control these unstructured processes, but Case Management solutions can be challenging to develop. Developing Case Management around a BPM solution preferably in conjunction with an Enterprise Content Management System solves many of the problems.

Oracle BPM provides a stable, flexible and secure BPM platform to support Case Management in a heterogeneous integrated environment.

The challenge: Loosely connected processes in a complex, heterogeneous environment

Business Process Management (BPM) solutions have helped organizations manage structured business processes that are clearly documented and well understood. But organizations now face the challenge of managing unstructured or semi-structured processes that are collaborative, content-intensive, and subject to constant change. These loosely structured processes – sometimes, but not always, called “cases” – can vary according to individual circumstances.

What is a case?

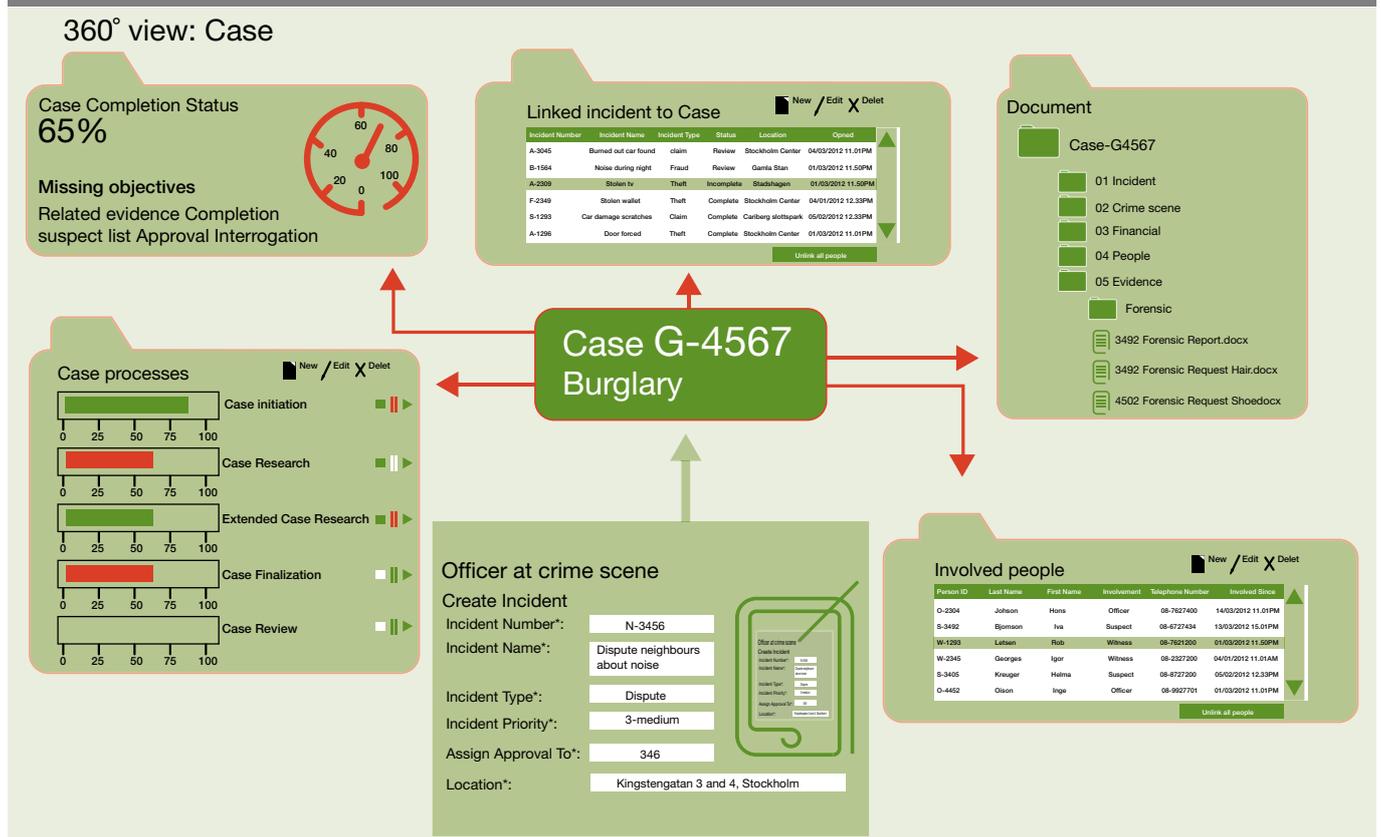
A case is a collection of activities that support a specific business objective. Each case has a lifecycle. During that lifecycle there will be a range of activities and requirements; information and content may need to be gathered in a wide range of formats (such as documents, email, minutes, interviews, photos and data). Throughout there will be process related tasks and actions, human decisions and interventions. At any time in the lifecycle we should be able to have an holistic view of the case, create reports and review audit trails. A case will be subject to organizational policy or procedure which determines the appropriate outcomes.

Case Management uses are typically: service request management, incident handling management and exception/investigation management. In business terms a case can be related to areas such as a customer complaint or grievance, end-to-end insurance claim management, or a health service patient.

Example: Case Management being used by the police

Capgemini Operational Police Solution, or COPS, is our Capgemini full-stack Oracle-based solution for driving back and front office transformation and shared services for police forces. COPS represents an integrated, intelligent and investigative police solution.

Figure 1 shows the 360 degree view of the different inputs to a Case, and how that Case needs to be managed effectively across the lifecycle of the case. There are multiple perspectives to a case.



At the heart of the solution is a Case Management system delivering a means of having full control over all processes related to a case in a siloed Police application environment

Example: When a home-owner reports a burglary to the police, a case is initiated. In this example, the police then go to the home to do an initial investigation. Evidence uncovered at the crime scene may require further research. During this phase more information will probably be uncovered, such as other burglaries in the neighborhood which could be related to this case. As a result, information will need to be shared between police departments. The information gathering may lead to an arrest. When enough evidence has been gathered, the case can be handed over to the court. This needs to be done with the correct evidence presented. A good case management process gives an overview of everything that is going on in the case at any time, enabling relevant and appropriate action to be taken at any moment.

Business perspective: There are multiple perspectives to a case. An overview of all activity related to a case from across the siloed Police application environment is available at any moment in the lifecycle.

Management information is available through tools such as a portal which gives a real-time, 360 degree view and also by tailored dashboards, which give the ability to check Service Level Agreements and Key Performance Indicators. These 'at a glance' tools enable swift reaction to, and resolution of, problems and bottlenecks. Another important benefit is faster and more targeted communication management between all related parties, enabling faster action on changing aspects in the case lifecycle.

Compliance: It is essential that management of a case meets legislative and ethical requirements. The relevant aspects of compliance need to apply throughout the lifecycle of the case. A main prerequisite is security, which involves restraining what the various participants are allowed to do and what information they can or cannot view. Another is the ability to audit. Audit functionality enables visibility and control of processes via real-time reporting; it enables looking back in time, for example to see who performed an activity at what time and for what reason. Audit trails support regulation control and issue management. In the previous example of the police investigation, if, for example information around the burglary case is leaked to the press, there is a record of those who had access to the confidential information.

How can this be achieved with Oracle Technology?

Until recently, organizations tended to shy away from Case Management on the grounds that it was too expensive, and contained more functionality than was needed by the organization. Building a Case Management solution around a BPM platform delivers fast results for both operations and management and integrates all existing functionality within the landscape in the scope of the case.

Oracle provides support for Case Management with two different platforms. The more traditional implementation can be achieved with Siebel, which offers a powerful Case Management application. The alternative is Capgemini's Case Management solution based on Oracle stack components, thereby providing a simple, robust and agile Case Management solution which can be deployed faster.



The Capgemini and Oracle stack Case Management solution is based upon five main technology layers for which Oracle delivers separate and interconnected components:

- **Portals & Dashboards** – Portals bring together all information around the case, lifecycle related activities, finished work, involved persons, gathering media into a 360 degree view. Dashboards give insight in SLAs and KPIs related to the case
- **Processes & Rules Management** – BPM and rules management play an important role in the execution of all tasks by participants and related applications. Flexibility can be added to the solution with rules management
- **Integration** – A core component in the solution enabling integration of case management with the application landscape
- **Security** – Restraining who is allowed to do what during the case lifecycle and the level of visibility of media is vital for case management
- **Data & Document Management** – The data management division has responsibility for the gathering and storing of run-time aspects of the case life cycle and related audit trails. Information relevant to the case will come from disparate sources, each with their own version of the reality. Master Data Management can help in situations where complex data discussions arise.

Capgemini and Case Management based on BPM

A BPM-enabled solution is configured largely from existing components, and therefore results can be obtained much faster and more affordably. This approach requires the organization to marshal adequate skills in both BPM and Case Management. Capgemini has a body of professionals who understand both of these disciplines, with deep expertise in the development of Case Management solutions, combining extensive business knowledge with best in class ERP and BPM Technology vendors which includes a strategic relationship with Oracle and its latest developments to support BPM.

Capgemini and Oracle: a well-established partnership

Capgemini's partnership with Oracle dates back to the 1990's and has strengthened greatly over the last decade. Capgemini has exceeded the requirements for many of its attained specializations and advanced specializations. In addition, we have nearly 3,000 certified Oracle specialists with deep industry and vertical expertise. Our knowledge, experience and specializations will continue to develop and grow in the future.



About Capgemini

With around 120,000 people in 40 countries, Capgemini is one of the world's foremost providers of consulting, technology and outsourcing services. The Group reported 2011 global revenues of EUR 9.7 billion. Together with its clients, Capgemini creates and delivers business and technology solutions that fit their needs and drive the results they want. A deeply multicultural organization, Capgemini has developed its own way of working, the Collaborative Business Experience™, and draws on Rightshore®, its worldwide delivery model.

Learn more about us at

www.capgemini.com/bpm

For more information about Capgemini and our partnership with Oracle, visit:

<http://www.capgemini.com/servicesand-solutions/technology/oracle/overview>

To contact:

Leon.smiers@capgemini.com