Pega Case Management
A best-in-class platform for building and managing dynamic case management applications

The Case Challenge
Case workers in many fields struggle to coordinate the various pieces of work that make up a case. This is problematic, since the way one piece of work is handled can change based on what is happening with other work.

Adding to this challenge is that these individual pieces of work may not be similar in character. Some work is manual, completed by knowledge workers, some automated by systems, and some done by clerical workers with system guidance. Each of these “workers”, must be aware of the work – much of it ad hoc – that is done by the others. When they are not – which is the norm – their fragmented efforts result in an abundance of duplicate and contradictory work, and inaccurate application of policies and procedures.

Most case management technology over-simplifies the problem, ignoring certain kinds of work, and failing to provide the rich orchestration that is required. The result is a continuation of the runaway expenditure and inefficiency that plague case management.

Build for Change® Technology
“Change aware” processing automatically captures new business objectives.

Easily Create Powerful, Flexible Case Management Solutions
- Business people can easily define case management solutions, defining the basic relationships of the work, including the case, and its sub-cases and tasks, content, service levels, roles, processes etc.
- Market-leading process management capabilities provide rich orchestration for complex, multiple nested cases with no coding.
- Incorporate multiple different kinds of work into the same case from collaborative knowledge work to automated processes.

Effectively Manage Dynamic Cases
- Case workers effectively manage work with a dynamic user interface that provides a complete view of the case and all its associated work.
- Case workers and managers effectively manage work across multiple cases with different views: case, task, reports and dashboards.
- Robust support for ad hoc changes to the case, automatically based on events, or manually based on user judgment.

Evolve Case Management Solutions in Real-Time
- Ground-breaking agility with user-guided “evolution” allows ad hoc additions of new work to be captured and saved as templates.
Creating Case Solutions

Case Designer

- Create and deploy new case types in minutes – from scratch or from existing case types
- Business owners create case types, using “cut,” “copy,” and “paste” type tools – fostering built-in re-use
- Define sub-cases, tasks, deadlines, and content for each case, with no limits to the number of nested cases

Advanced, Event-Based Process Automation

- Best-in-class process automation capabilities for case orchestration
- Unified rule engine to support dynamic case management
- Rules-based automation, routing and escalation
- Support for complex timelines, including goal and deadline offsets based on the case hierarchy or dynamically calculated values
- Specify work and content that is required for case resolution
- Fine-grained routing support and role-based security

Content Management

- Native content management, including: categorizing and versioning documents, role-based access control, and document search
- Support for accessing multiple ECMS concurrently
- Support for Content Management Interoperability Services (CMIS) Standard

Pre-Packaged Case Applications

- Over 30 packaged case applications across multiple verticals
- Supports for all types of case management including service request, investigatory, and incident management

Design-by-Doing: Real-time System Evolution

- New, manual cases and tasks that are added at run-time can be saved as new case types for use in the future (role-based privilege)
- Capture emerging best practices, or “inoculate” against exceptions
- Constantly evolve system to reflect the actual work

Architecture & Integration

- Services oriented architecture: SOAP, WSDL, ESB support
- Distributed deployment across heterogeneous environments
- Synchronous and asynchronous integration: EJB, JCA, and messaging (JMS, MQ)
- Event-driven architecture

Working Cases

Collaborative Case Management

- Keep informed of how work colleagues are doing on your cases
- Support for parallel and asynchronous work – multiple caseworkers can work simultaneously on the case
- Web access allows third-party users to collaborate on cases

Case Portal

- A complete view of caseworker’s caseload, with the ability to expand case to see sub-cases and tasks, and all basic info
- Task list showing most urgent work across all cases
- Views can be customized for different users and roles

Detailed Case View

- For each case, sub-case or task, see complete context, including:
  - Hyper-linked Breadcrumb trail for context in overall case
  - All sub-cases and tasks, status, and collaborators
  - All associated parties (customer, spouse, rep, etc.)
  - 360° view of the case subject (e.g. customer, citizen)
  - Content for case and all nested cases and tasks
  - All related cases, open or closed (configurable)
  - Notes associated with case and all nested work
  - All available actions, processes, and work
  - Extensible to incorporate case specific info and actions

Dynamic and Ad Hoc Actions

- Available actions are context- and role-specific
- Add more content or work automatically, or ad hoc
- Automate escalations based on rules, or escalate ad hoc
- Create new, ad hoc manual cases or tasks to handle work not previously encountered (e.g. exceptions)
- “Save as template” feature: Save ad hoc manual cases and tasks as templates to be applied in future, similar situations
- Suspend or “wake” cases automatically using events or manually

Visible, Actionable, Auditable

- Audit trail logs all system and user actions
- Records the specific policy applied at every step
- Operator-specific graphical dashboard
- 36 standard reports, unlimited custom via report wizard
- Export to Microsoft Excel for further analysis