



## Ultra 8.5 - Knowledge Worker Edition

### *Delivering the Value of Advanced Case Management*

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#### Highlights

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- Today's modern workforce is heavily dependent on knowledge workers to make good business decisions in increasingly complex and demanding work environments
- Ultra provides a rich set of tightly integrated content, process, and case management applications that improve business processes and outcomes
- The Ultra architecture leverages the strengths of IBM Case Management platform components, extended with a wealth of additional features and functionality
- IPD offers a full range of complementary assessment, implementation, and optimization services
- IPD offers many examples of customers that have reduced costs, enhanced performance, documented compliance, and improved agility

#### ***Focusing on Knowledge Workers***

According to some estimates, knowledge workers comprise 50% or more of the workforce in many of today's modern enterprises. Knowledge workers are particularly prevalent within the economy's service sectors: insurance, education, financial services, government, healthcare, information services and the like. They are also prevalent within horizontal, service-oriented business processes such as compliance, contracting, customer service, human resources, legal, licensing, quality assurance, and other professional service roles.

Historically, automation has been accomplished for the data-intensive segments of these industries. The remaining work that cannot be readily automated typically necessitates the application of knowledgeable staff members capable of exercising sound judgment in arriving at business decisions.

At the same time, the knowledge work force is rapidly changing. As the baby boomers retire, a new generation

of knowledge workers is confronted with increasing complexity in both tasks and system interactions, as well as dramatically higher expectations for personal productivity. This workforce is technology savvy, but lacks the breadth of knowledge that only years of experience can provide.

#### ***Ultra Knowledge Worker Edition***

The Ultra Knowledge Worker Edition is designed for today's workforce. It represents the next stage in IPD's twenty year mission to optimize mission-critical business processes and the capabilities of the knowledge workforce. Uniquely crafted to fulfill content, process, and case management requirements within a tightly integrated user experience, the latest version of Ultra provides a complete web-based knowledge worker solution applicable to a variety of industries and use cases.

Ultra leverages flexible and scalable IBM platform components – extended with IPD's proven content, process, and case management features – to automate and optimize knowledge-based business processes.

## **Ultera's Broad Applicability**

Suitable for all patterns of work that involve the complex handling of case related processes, such as underwriting, complex claims, service requests, management of exceptions and the performance of investigations, Ultera offers an expanding portfolio of solution accelerators tailored for various use cases, including:

- Contact centers/customer service
- New business/underwriting
- Enrollment/onboarding
- Claims/benefits processing
  - Disability insurance
  - Government programs
  - Healthcare payers
  - Life insurance
  - Property and Casualty
- Investigations

As a configurable application offering industry and process-specific solution accelerators, Ultera can be deployed for both point solutions and broad enterprise implementations. It can be rapidly configured in a number of ways for a virtually unlimited number of different industries and use cases.

## **Ultera Features and Functionality**

The Ultera Knowledge Worker edition bundles together all the capabilities needed to support knowledge work and knowledge workers. It unites information (content, data, analytics) and processes (workflows, events, tasks, rules) to support knowledge worker collaboration and decision making. From work inception to completion, appropriate information, processes, task automation and human interactions are brought together for

timely and accurate knowledge worker consideration within the context of the case at hand.

At its foundational level, Ultera integrates IBM platform capabilities within its application framework, including:

- Integrated Case Management functionality, including the full range of capabilities that Gartner defines as *“Composite applications that companies can use to support the workflow, management, collaboration, storage of images and content, decision making, and processing of electronic files or cases. Core elements are content management, business rule management, workflow, process metrics and measurement.”*
- Content management for paper and electronic ‘documents’ of literally hundreds of file types.
- Full-featured process management for structured, ad hoc, and collaborative workflows.
- Business rules, leveraged as real-time decision support tools for knowledge workers, and used to fully automate certain tasks.
- Extensive history and audit trails that document the rationale and process for each business decision.
- Simple, reusable, and flexible configurability for ongoing solution refinement and new requirements.

Ultera additionally extends its platform-layer integration with features and functions designed to both enhance the knowledge worker experience and optimize the outcomes of their processes. Among the many features and functions supplied by Ultera, some of the most notable include:

- Work & Case Searches – configurable for each role, Ultera’s work and case searches save knowledge workers the effort of searching, retrieving, and prioritizing the work relevant to their job responsibilities. Filtering options allow work search criteria to be further refined using standard search operators (e.g., >, <, =, etc.). Results may be delivered in two distinct modes: list (in which users select, prioritize, and assign work to be consumed) and push (in which work assignment is automated and continuously delivered, one item at a time, without user intervention).
- Work Creation – enables knowledge workers to easily create new work on an ad hoc basis and introduce it to the appropriate step within the overall business process.
- Optimized User Experience Interfaces – designed for work processing efficiency and accuracy, Ultera’s core set of user interfaces for acquiring and processing work are highly configurable to the needs of each knowledge worker’s role and each step within a business process. In addition to providing a full complement of tools for processing work, Ultera’s GUI’s provide unified access to all source and associated documents and electronic content.

Ultera's folder view includes a notepad function and access to the complete history of the work in process. The work viewer can be opened as a separate window for additional desktop flexibility. For implementations requiring even further optimization of the user experience, Ultera supplies a configuration tool for creating use case-specific GUI workbenches, enabling system administrators to define the appearance and behavior of individual process steps. For the most sophisticated and highly integrated deployments (e.g., underwriting and complex claims with extensive data aggregated from other systems), IPD offers e-forms that operate as tabular extensions within the core work viewer.

- Case Management – for tasks and processes best served by case management concepts, Ultera provides built-in capabilities that leverage IBM Case Manager. These capabilities include configurable case searches, case-centric workbenches, and a case plan view that displays the complete chronology of case work including completed, outstanding, and future tasks in a GANTT-like graphic.
- Structured and Non Structured Work– knowledge workers must have the ability to manage both structured and non-structured business processes. Ultera supplies distinct methods for dispatching and controlling work. A structured process is controlled by an underlying workflow map which determines the

state (outstanding or complete) and next appropriate process step as part of an explicitly mapped process. In an ad-hoc, non-structured process knowledge workers decide the next destination, or set of tasks on a more discretionary basis.

- Content Searches – for situations when content needs to be reviewed independently of work in process, Ultera provides capabilities for authorized knowledge workers to search part or the entirety of the enterprise content repository. Supporting multiple properties (e.g., object store, document class, and content metadata) and operators for searching content, Ultera's content viewer automatically supplies content properties, which may be edited by authorized users. The content viewer also provides the full complement of features for manipulating (zoom, magnification, sizing, rotation, etc.) and annotating (lines, arrows, shapes, highlights, sticky notes, stamps, etc.) imaged documents.
- Attachment Handlers – as a background automation service, Ultera includes configurable attachment handlers to automatically identify and match subsequently received information with work already in process and inform users of the incoming information.
- Managed Distributions – for deployments in which work initiation is dependent upon other systems (e.g., exceptions generated by claim processing systems), Ultera includes

configurable managed work distribution functionality as another background automation service. Managed distributions create, update, distribute and synchronize workflows based on events in line-of-business systems and other sources external to the Ultera solution.

- Client Integrator – when desktop-level communication is needed between Ultera and host-based applications, such as claim processing systems, client integrator automates that communications process. A configurable service, client integrator uses rules to identify integration events and scripts to communicate with the host system and then populates needed data within Ultera, allowing it to use that information to automatically complete or update the work in process.
- Support for multiple environments – configurable environments allow work to be logically segregated based on unique business needs, while allowing authorized knowledge workers to process work across multiple environments.
- System Manager – provides configurability for work search, case search, client integrations, managed distributions, attachment handlers, workbenches, and work and content searches. Ultera's fully integrated administrative tool enables the definition and configuration of other system components that support and provide data to user interfaces. It allows business analysts and system administrators to create, maintain,

modify, and enhance system configurations to quickly satisfy initial implementation requirements and agilely respond to changing needs. Changes made via System Manager are effective immediately in the Ultera system.

- **Help** – both end user and system manager interfaces are supported with an interactive help system that provides step-by-step instructions and supporting screenshots for properly using Ultera.

### **Architectural Characteristics**

Ultera is not only tested and certified in IBM labs, but also proven in large-scale deployments for all the technical characteristics expected from an enterprise-class system, including:

- **Stability and Performance** – leveraging the time-tested strengths of IBM to perform responsively and without interruption.
- **Scalability** – for our larger clients, Ultera supports over 10,000 geographically dispersed users on virtualized application servers, with expansion as simple as allocating more processor and memory resources.
- **Extensibility** – highly configurable and inclusive of a Software Development Kit (SDK) for ease of extending deployment across the enterprise without the need for costly coding or vendor support.
- **Security** – LDAP authentication, Active Directory support, permissions

by user and LDAP groups, and configurable privileges.

- **Integration** – offering methods and connectors for integrating with line-of-business systems, via Web services and Java API's, in addition to IPD's Client Integrator Service for legacy systems lacking suitable API's.
- **Architecture** – comprised of Java and state-of-the-art open source tooling, Ultera provides a robust technical foundation capable of enterprise-wide deployment.

### **How Ultera Interacts With IBM ICM**

Ultera provides a layer of features via the IBM BPM & ICM API's that deliver a rich experience to the end-user.

The Ultera Business Services layer uses an AJAX/Spring-based framework to implement pluggable brokers that transform basic constructs, such as content, into situational information, such as a properly ordered list of all content specifically relevant to a particular case.

Ultera leverages a Model-View-Controller (MVC) architecture that leverages Spring, XHTML, DWR/AJAX, and Dojo. This architecture enables Ultera deployments to rapidly implement business rules and user interfaces tailored specifically to business' needs.

### **IPD Content, Process, and Case Services**

IPD offers a full range of content, process and case management-focused services that can assist with every step

of your analysis, implementation and maintenance phases. A sampling of these service offerings includes:

### **Assessment and Planning Services**

- Opportunity assessments
- Feasibility studies/business case development
- Model office environments
- Strategic ECM, BPM, and case management planning
- Performance benchmarking
- Requirements mapping/GAP analysis
- Work process analysis and redesign
- Process modeling
- Cloud based Proof of Concept

### **Implementation Management Services**

- Implementation planning
- Conceptual and functional design
- Training curricula development
- Change management planning
- Project management
- Solution configuration
- Application design and development
- Business rule definition
- Testing support
- Customized training materials
- Train-the-trainer instruction
- Conversion services and support
- IBM P8 & ICM software installation and implementation management
- Ongoing support

### **Performance Optimization Services**

- Process analysis and optimization
- Load testing and performance tuning
- SDK training and support
- Business rule development
- Custom reporting
- Test plan development
- Ongoing training
- Partner software upgrades

- Ongoing solution deployment

IPD provides several related service offerings specific to case management, including:

- Opportunity Assessment – quickly identify candidate business processes that represent the best opportunities for case management solutions, and assess their potential value with process analysis and a roadmap for moving forward.
- Cloud-Based Evaluation – rapidly evaluate case management’s ability to solve specific business problems within the context of your business needs and obtain real-world, fit-for-purpose exposure to case management’s comprehensive capabilities.
- Proof of Concept – without any hardware or software commitment by the client, effectively and efficiently gain an understanding of how well new case management technologies align with your organizational goals and operating requirements using real software tailored to your needs, targeted use case requirements, and measurable objectives.

### **Results with Ultera**

IPD solutions focus on optimizing business process outcomes. These include revenue enhancing capabilities and cost reductions. IPD clients experience lower claims costs, improved customer experience, lower policy turnover, enhanced competitiveness and greater strategic business agility. IPD clients have also

experienced improved productivity in the range of 20% - 60%, as well as reduced cycle times up to 80%

IPD customers have realized significant results for many of their core operational objectives, including:

- Strategic Benefits – IPD solutions focus on optimizing business process outcomes. These include revenue enhancing capabilities and cost reductions. IPD clients experience improved customer experience, lower policy turnover, enhanced competitiveness and greater strategic business agility.
- Reduced Costs and improved Productivity – when making decisions involves content and data from multiple systems, Ultera reduces the effort of compiling the information, and streamlines the tasks and interactions among knowledge workers, allowing them to focus on their value-added knowledge work.
- Decreased Errors – with so much information available, Ultera ensures knowledge workers don’t overlook any of it, review it all in the right context, and make solid decisions using applicable business rules.
- Improved Process Compliance – if decisions are later challenged, Ultera documents the work performed, the information reviewed and the decision criteria used, clearly demonstrating the complete process that was followed.
- Simplified, Process Modifications – facilitating ongoing improvements and competitive innovation, Ultera’s accessible configurability enables

business analysts and administrators to quickly perform modifications and introduce enhancements.

### **Image Process Design (IPD), Inc.**

IPD, a 20-year IBM business partner, delivers highly responsive knowledge worker solutions for the mission-critical processes of leading organizations across the United States and Canada. To learn more, please contact [info@ipdsolution.com](mailto:info@ipdsolution.com) or visit our website at [www.ipdsolution.com](http://www.ipdsolution.com) or call IPD at 248.723.9733, ext. 8030.