



An ISO 9001:2008 Company



**CASE MANAGEMENT AND
INTEGRATED DOCUMENT MANAGEMENT REPOSITORY
DEVELOPED FOR INSURANCE SECTOR**

ABOUT THE CLIENT:

The client is a joint venture among India's leading Financial Institutions for insurance sector. Their product range covers the insurance products focusing on the typical needs of health, security, savings and wealth. The company also offers a wide range of group insurance products ranging from credit life, term and employee liability plans.



CLIENT'S TECHNOLOGY REQUIREMENTS:

The client's insurance business required a case management and integrated document management repository for their business processes. They wanted a business solution to manage their operations, provide process visibility & improvement as well as business agility in the long term. The major processes to be included in the tech solution were:

- User Skill/Queue Management by Managers
- Team Work Allocation by TLs (Get Next Available Task, FIFO, Push Tasks etc.)
- Quick Create/Split of Existing Cases
- Diary Functionality
- Temporary suspension of Tasks
- Task Collaboration (Referring Tasks to TLs)



KEY CHALLENGES:

- The client's existing process flow required modification to include new customers and other related fields. But the points of concern include the existing instances of the application to remain unaltered, the team had to understand/figure out the existing architecture to include the changes. Moreover, the workflow required a testing phase to test the changes and subsequent effect on the complete process, thereby increasing the development time. This process is to be followed every time a change is proposed in the system.

- Since the process flows are tightly coupled and tailored to one customer specific requirements and thus to roll out a solution specific to a new customer introduces a lot of challenges and if not all, then most of the SDLC phases needs to be followed which consumes time to roll out the developments into production environment.
 - The client wanted a common platform which enables business users to create and roll out new business process model and which could be hooked up easily in the existing application/pool of applications.
 - A framework needs to be in place which allows easy development and roll out of new processes which can be carried out by an administrative user in business and do not need core IT team members for such activities.
 - The documents were not to be stored locally on SBM servers and but had to be pulled from external document management system (DMS). This needed an integration and custom document viewer functionality to be developed.
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SOLUTION APPROACH & METHODOLOGY:

- The solution involved automated processes for various activities thus used Savvion Business Manager (SBM 6.5 SP2) for designing and development of business processes.
- The out of the box BPM portal provided by SBM was customized to support the Diary functionality. At times, certain cases/tasks might be required to be 'parked' for some time as they await some inputs from customer (e.g. specific document). These situations can happen across various processes of the company and there needs to be a comprehensive, centralized functionality to address such cases. This functionality is referred to as 'Diary Functionality'.
- Using custom adapters in SBM, the solution was integrated with external document management system, this integration was based on SOAP based web services.
- SBM provides features of task suspension which was effectively used for the requirements of Diary functionality as well as pausing a task.

- The GetNext feature was custom implementation in SBM so that business rules specific to the organization for getting the next task can be easily implemented and when needed can be updated.
- Pramati server which comes as OEM with SBM was used for process and application deployment, later on the app server was tuned to support the load requirements.
- The user access and ACL as well as business user hierarchy was developed using out of box features in SBM and was customized to support the team hierarchy, basically application provided interfaces for creating groups and user in the application.
- SBM's feature of queues was used managing the tasks and assignments.
- Configuration schema were defined to provide the functionality where change is process or rolling out a new process can be done by administrative user without need of core IT technical team.



KEY HIGHLIGHTS OF THE APPROACH:

- The application required excellent design skills so that the entire application can be easily configured with the existing user interfaces. Based on industry scenario, the companies regularly launches new plans and the application had to be elastic to include new applications.
- The approach made maximum usage of the features of SBM and resulted into a framework which provided the capability of rolling out new processes in system and hooking it up with the existing cases in less than a day time as compared to weeks involved in doing so.
- The framework also provided the business user to develop/design and deploy the new processes.
- Utilizing SBM kept the data confined to one server rather and the only data which is needed for the processes to run was captured thus the overhead of repeating data values which was anyways stored in other core insurance systems.

- The original documents pertaining to a customer insurance service request was kept and retrieved from external Document Management System and the integration in SBM was done in seamless way keeping the documents at their centralized location.
- A custom document viewer allowed the end user to not only view document but also to highlight, annotate the document to ease the collaboration.



ACHIEVEMENTS:

- Based on the key business challenges and objectives the team developed a framework using the apt technologies. The framework was highly effective and included features of flexibility to allow runtime changes to existing processes, to add new process(s) dynamically, without having to go through the development cycle, swiftly adapt the changing business needs, support new service request processes etc.
- The application allowed business users to manage the process(s) as they want and not limit the flow to a sequence of pre-defined steps. Also provided a centralized web based portal for hosting various service industry processes.
- The effective usage of features in SBM like groups, queues and ACL has made the framework extremely effective and delivered functionalities like a process gets resumed immediately when the pending document(s) arrive for the case/request.
- Delivered a framework for automated UI generation of the newly designed processes keeping the UIs to be form - template based.
- Created a reporting framework which helped providing dashboard containing reports about team wise work distribution, TAT and users/agents skills mapping.

TECHNOLOGY DEPLOYED:

Presentation Tier Framework	ExtJS, JSP, AJAX, DWR
Business Tier Framework	Spring MVC, JMS, EJB, Servlets
Persistence Framework	iBatis (MyBatis)
Database	Oracle 10g
Platform	Savvion SBM 6.5 SP2, NewGen DMS (Omnidocs)
Application Server	Pramati
Development Tools	Eclipse Based BPM Studio 6.5 SP2
Design Tools	HTML5, CSS3

PROJECT HIGHLIGHTS:

Client	JV of leading Financial Institutions
Location	India
Industry	Insurance Sector
Project Duration	5 months
Team Size	5 People
Delivery Model	Offshore
Engagement Model	Retainership

ABOUT PSI

Pratham Software Inc. (PSI) is a global IT services company (with established ISO 9001:2008 practices) providing software product development, consulting and outsourcing solutions to enterprises worldwide. While providing a wide range of solutions, we focus on Outsourced Product Development (OPD), Business Process Management (BPM), Application Development and Maintenance (AMD) and Content Engineering. Our extensive experience in OPD helps us build strong relationships with Independent Software Vendors (ISVs), as we work with them throughout the product development lifecycle. Over 12 years of experience in the BPM field with various tools such as Savvion, IBM Lombardi, SharePoint and open source tools such as Activity have helped us gain leadership position in BPM. In terms of technology and platform, we work across all major technologies such as Microsoft, Java and Open source and have capabilities and experience in developing solutions for web, mobile, Cloud and social media. For Enterprise customers, in addition to Process Automation, we also offer development and support services in BI and DWH.

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