A Day in the Life of a Content Navigator

Snowbound
You know the saying: behind every large enterprise employing IBM solutions are hundreds (if not thousands) of employees navigating massive amounts of documents, images, data, and social media content. Because of the critical nature of this information, only those equipped with solutions that allow them to quickly view, assemble, analyze, and, yes, navigate content, will improve business outcomes. Without these content navigators to manage this sea of information, the gears of the enterprise would promptly stop churning.

Regardless of industry (financial, insurance, healthcare, call center, etc.) or function (answering customer requests, processing a loan, adjudicating a claim), these workers need the necessary tools to complete tasks and make accurate decisions. Only when content navigators are empowered with these capabilities can the desired productivity and business processes be achieved within an organization.

While IBM’s Advanced Case Manager provides the optimal foundation for achieving this success, additional solutions such as a proven, browser-based HTML5 document viewer equip content navigators with the necessary functionality needed to expedite workflow, make better decisions and resolve cases more effectively.

With all that said, the best way to fully understand the case management process and how advanced document viewers can complement existing IBM solutions is to take a look at a day in the life of an IBM Content Navigator…
Look around on your commute to work. There are probably content navigators everywhere—at the stoplight, on the subway, in the elevator—and they work in a variety of industries and departments…

**Financial:**
- Cases: Managing customer issues, disputes, complex credit applications, mortgage processing (i.e., loan origination), special pricing requests, fee amnesty, fraudulent transactions, and identity theft
- Note: IBM Case Manager streamlines and improves loans, credit and finance processes. Banks that utilize Case Manager have a competitive edge that allows them to focus on organic growth strategies, think creatively about retaining existing customers and identify strategies for attracting new ones.

**Insurance:**
- Cases: Streamline underwriting, handling insurance claims (i.e., IBM Content Navigator (ICN) with claims folder and multiple document formats); create a policy, add coverage, pay a claim
- Note: Insurance cases involve a great deal of unstructured data in the form of text and multimedia content. Issues like incomplete information, background searches, and users needing expert advice are constantly cropping up and require dynamic case management.

**Healthcare:**
- Cases: Assessing an applicant for additional management by a Care Manager handling Care Management programs for its members; patient record management (profile information, medical records, x-rays, prescription history)
- Note: Case Manager helps ensure that each action or change to patient records has a required follow-up step to ensure the safety and proper handling of the patient and their records.

**Call Centers:**
- Cases: Enterprises need to manage incidents, such as customer complaints or disputes, to provide exceptional service to the customer
- Note: Knowledge workers must collect and manage all of the documents, data, content, collaborations, policies, rules, analytics and other information to help them quickly engage, resolve, and improve response times.

If these different industries share one thing in common, it’s the need to capture, manage, store, preserve, and deliver content and documents. As evidenced by the various use case examples, an organization in any of these fields is required to work with many different kinds of documents, pages and format types. Regardless of the content or where it resides, business users must be able to easily access, view, and manage documents in order to be successful.
The roles and responsibilities of content navigators are often unique to their title and position within the organization.

- **Titles:** Case Worker, VP, Director of Operations, CIO, Compliance & Customer Service Executives

It’s no surprise that every company is constantly looking for ways to reduce costs, minimize risk, improve efficiency, and encourage growth. Standing in the way of these goals is often a host of similarly recognizable obstacles: circuitous business processes, fragmented communication, and repetitive operations—just to name a few.

While case workers and content navigators will be in the trenches focusing on specific case management operations, it is the responsibility of these other members within the organization to focus on the bigger picture.

IBM Case Manager plays a big role in all of the moving pieces outlined below. Not only is it the tool that enables content navigators to manage content, it allows their superiors to meet their requirements, accomplish their goals, and properly evaluate the overall performance.

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**These responsibilities include:**

- Developing and executing a strategy to manage cost or profit centers
- Process efficiency and effectiveness
- Risk and compliance with key regulations
- The ability to show discernible ROI and project success
- Managing direct and indirect line of business services; customer service

**What they are looking to accomplish:**

- Increase effectiveness of core applications
- Improve and streamline decision making; reduce variability and errors
- Provide comprehensive visibility into process metrics, spend, and customer satisfaction
- Adhere to regulatory compliance and maintain proper controls and records
- Reduce expenses
- Improve procedures to be more responsive to the needs of the business

**How they are evaluated:**

- Customer satisfaction or loyalty measures
- Throughput—the number of cases opened and closed over a specific time
- Time to value (time it takes to complete a project or update an application)
- ROI
**AllM Survey on Leading Adoption Trends in Case Management**

**Most Prevalent Case Application**

- Project Management: 48%
- Contacts/Bid Management: 40%
- Help Desk: 37%
- Incident Reporting: 35%
- Claims: 27%
- Law Suits: 22%
- Customer Disputes: 17%

*Takeaway:* Case Management is called by many different names, but has similar requirements.

**Pressures Driving Case Management Adoption**

- 55% Reduce Costs
- 50% Access to Information
- 49% Negative Consequences from Bad Decisions

*Takeaway:* Access to information and correct decision making as important as cost reduction.

**Biggest Drivers for Improvement**

- 53% Improved Process Productivity
- 50% More Effective internal Collaboration
- 32% Faster Case Resolution
- 32% Improved Customer Experience
- 25% Compliance

*Takeaway:* Effectiveness as important as throughput.
IBM Case Manager allows businesses and agencies to easily keep track of content and collaborate on specific activities within a structured process-oriented framework. With the Case Management solutions in place, the content navigator can begin to efficiently capture, manage, analyze, store, preserve, and deliver content and documents related to organizational processes.

With that said, there are often many challenges that content navigators face on a daily basis when managing cases.

**Challenges:**

- A large number of exception processes or process gaps that must be handled manually.
- Providing access to information in real time is a challenge. Either the data is housed in multiple backend applications or information is still paper based.
- The application UI may only allow for viewing a few document types and have limited interactive capabilities.
- The solutions must be able to easily integrate and interact with backend applications as information and solutions change.
- The UI making it difficult for Case Workers to decipher the required best practice, optional and ad hoc processes or tasks.

In order for the content navigator to succeed and overcome these exception processes and gaps, the case management solution must provide a flexible work management model. This can allow the case worker to use his or her judgment and experience to progress the case and make informed decisions, but also benefit from the efficiencies of process automation where required.
One such solution that can eliminate many of the challenges listed above and equip content navigators with the tools necessary to meet their requirements is a pure HTML5 document viewer, which gives users important tools not found in default viewers.

**What is VirtualViewer HTML5?**

A powerful document viewing solution that enhances the case management system and gives business users more tools to do their job efficiently and successfully.

- **Zero Footprint**
  - Eliminates application downloads
  - Provides complete mobility and access to content

- **Zero delay and format restrictions**
  - High-speed viewing with distinctive Page on Demand™
  - Multi-server options
  - View virtually ANY document format

- **Zero technical barriers and customer support issues**
  - Works in virtually any browser
  - Facilitates rapid deployment with easy-to-use APIs

**HOW VIRTUALVIEWER WORKS:**

VirtualViewer HTML5 equips IBM users with the most advanced document imaging viewer by providing complete mobility to easily view documents from any web browser. VirtualViewer increases productivity for case workers who require advanced page manipulation, allowing them to dynamically work with documents and quickly navigate between multiple pages and documents using tabs and thumbnails within a single viewer.
A pure HTML5 document viewer, like Snowbound’s VirtualViewer HTML5, can easily integrate with IBM’s Content Navigator and enhance the capabilities of the content management system by providing users with features not found in default viewers, streamlining and expediting the workflow process of navigating content.
Unique Navigation Tools

Case Worker Responsibilities: Content Navigators need to be able to easily navigate between documents and individual pages.

How VirtualViewer Meets Your Requirements:

- View multiple documents in a single window. Users can view multiple documents within one single browser window.
- Switch between multiple tabs for quick navigation. Users can compare multiple documents and multiple pages by using a combination of tabs, bookmarks, and thumbnails.
- Pre-select certain pages of multiple documents into a virtual document, making it easier for the case reviewer or manager to go directly to only the pertinent pages of documents. For example, a set of 15 documents making up 100 pages can be minimized to one virtual document with six pages that can then be presented to the reviewer for expedited processing.

Advanced Page Manipulation:

Case Worker Responsibilities: Content Navigators need to be able to interact with documents in a variety of ways during the case management lifecycle.

How VirtualViewer Meets Your Requirements:

- Split into two or more new documents
- Merge pages into a single document
- Create new documents by adding pages
- Reorder and delete pages
- Extract pages
- Locate information quickly with text search
- Export and download the document locally
- Share & save different versions of documents
- Email the document as an attachment
- Print directly from the viewer
3 XML-based Annotations:

Case Worker Responsibilities: Content Navigators need to be able to annotate, redact, and comment on documents and individual pages.

How VirtualViewer Meets Your Requirements:

- Annotate, redact, and red-line documents as they transfer back and forth during collaboration between appropriate personnel. Things like credit card and social security numbers can be easily hidden depending on a user’s permission and security level so sensitive content cannot be shared with third parties.

- Watermark and stamp documents for approval and denial. An administrator can easily create text- or image-based watermark overlays (such as an approval signature) that can be applied to a single page or a range of pages within a document.

- Create an audit trail of document activity (annotations, redactions, comments, metadata, approvals, etc.) with an XML file. By capturing user activity, companies can create a definitive record of the lifecycle of each document.

- Additional collaboration tools. Rubber stamps, highlighting, “sticky notes,” and more.

- Seamlessly incorporates existing FileNet annotations.

4 On-the-Go Mobility:

Case Worker Responsibilities: If a Content Navigator isn’t at their workstation, they still need to be able to access their case files. A browser-based document viewer provides users incredible amounts of flexibility when accessing their critical information.

How VirtualViewer Meets Your Requirements:

- VirtualViewer HTML5 is a browser-based document viewer that works on any browser

- It does not require any downloads or client-side installation so users can access it from any device, including smartphones and tablets
Case Management is all about being prepared for the ad-hoc and unpredictable activities that are bound to arise each day and a dynamic document viewer is one of those essential (and sometimes overlooked) tools.

At the end of the day, when content navigators have the right tools, they make better decisions. A powerful document viewing solution enhances the case management system and gives business users more tools to do their job efficiently and successfully. Although just one piece of the puzzle, a powerful document viewer can make those standard business goals (reduce costs, minimize risk, improve efficiency, encourage growth) a tangible reality.