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### **Global 360 Unveils Case360 11.0, Industry's First True Case Management Product**

*Release Extends Persona-Based BPM to Include Researcher & Data Entry Clerk Roles for Case Management Initiatives*

Gartner Business Process Management Summit

ORLANDO, Fla.--([BUSINESS WIRE](#))--Global 360, a leading provider of Process and Document Management solutions, today launched the industry's first true case management solution, Case360 11.0. Leveraging Global 360's Persona-based BPM approach to meet the specific needs of all participants in a process, Case360 11.0 supports dynamic, ad-hoc processes and for the first time combines the advantages of case management with full support for conventional processes.

Extending the role-based reach of Global 360's persona-based approach, Case360 11.0 offers two new Personas, Researcher and Data Entry Clerk. For these workers, whose tasks are often of an ad-hoc nature and require them to work outside of their organizations without necessarily knowing next steps, Case360 11.0 provides the ideal environment in which to work.

Forrester Research vice president and research director Connie Moore defines case management in a recent blog post as "a pattern of work that's highly dynamic, in which a group of people systematically collaborate in structured and ad-hoc ways on a case folder using business process management, document management and collaboration tools. A case contains the data, content, collaboration artifacts, tasks, milestones, discussions, events, behaviors, policies (including rules), and processes supporting how each case is resolved. Ideally, the case management process brings together people, process and information."<sup>1</sup>

Combining the capabilities of document and business process management tools into a single solution, Case360 11.0 uniquely handles the complexities of both collaborative and ad-hoc business processes, providing a team-centric environment through access to documents, tasks, deadlines, and threaded discussions from within a case folder. All the information needed to process a case is readily accessible and available to all, yet tailored to an individual's roles and privileges. The result is a unified and integrated view of case data, giving organizations complete visibility and auditable control.

The key benefit of the case management approach is that the case worker gets the information required to make decisions and can work dynamically in an agile, more natural way. According to Forrester's Moore's blog post, "Because the case system is based on BPM and business rules, nothing falls between the cracks while the case worker is waiting for all the turnaround documents, requests for information and collaboration interactions to complete."<sup>1</sup> Case360 11.0 helps to easily manage these unstructured and typically more expensive and complex processes.

"The technical challenge is great for case management BPM vendors. The platform needs to provide everything a conventional BPMS provides, and add case management on top," notes Bruce Silver, independent industry analyst. "Case360 is the first BPMS that really meets the needs of case management. It provides all of the key technical requirements and overcomes the main challenges. And while its primary focus is case management, Case360 can support conventional processes as well, either standalone or as aspects of a case folder. That explains why BPMS vendors typically promote case management "features" rather than a true case management BPM platform. Case360 shows that it can be done."

According to Silver, traditional BPMS vendors have a hard time addressing case management for three key reasons:

- Conventional BPMS cannot manage the collection of tasks and processes interlinked by events, rules, and business judgment that make up a case as a single complex “thing;”
- Most BPMSs treat documents as attachments, available for viewing, but they rarely support creating, editing, versioning, organizing, or finding the specific document types required by the case, or storing documents in large volume, or responding to content events, or retaining documents for years after the case is complete;
- Rather than providing an out-of-the-box case folder as part of a case management system, BPMS vendors are far more likely to propose that the tools used to configure the conventional process portal environment can be used to create something like a case folder, which misses the core idea of case management: A case is not just a collection of isolated things, like processes and documents, but a *single thing* that is progressing toward completion.

According to Ken Burke, the Clerk of the Court for Pinellas County Florida, “As the official records custodian for all court records, we are responsible for maintaining the integrity of court files which, until Case360, have been almost entirely in paper. Case360 allowed us to ‘go paperless’ and streamline our operations in the process. Judges can now read, sign, approve and take actions on case files electronically from anywhere and at anytime. A single file can now be viewed simultaneously by multiple people, which can’t be done with paper. We’ve significantly reduced the amount of staff hours needed to locate files and answer basic questions. Quite simply, Case360 has completely transformed how we do business.”

Case360 11.0 features a highly scalable process engine optimized for people and content management, enabling SOA-based access for human-centric business processes. Case360 leverages Microsoft Visio for process modeling, reducing learning curves, and enhancing business and IT collaboration.

In addition, The Task Management facility in Case360 11.0 supports rapid adaptation of business processes by allowing end users the flexibility to add or adapt assignments on the fly. The Task facility also includes support for deadline management and dependencies. Visibility into the status and progress of each case folder is built in.

Case360 11.0 will be available to customers in December.

<sup>1</sup>*Go Lean With Case Management (Or, How To Have Fun On A Friday)*, The Forrester Blog For Business Process & Applications Professionals, August 18, 2009.

### **Process360 10.0 Now Available**

Global 360 also announced the immediate availability of Process360 10.0, the industry’s first BPM suite based on Global 360’s Persona-based BPM approach and the first to deliver out-of-the-box applications that address the unique needs of all people in a process. The applications, called viewPoints, speed the development, deployment and adoption of process management systems, which leads to faster time to market and ROI.

### **Upcoming Webinar**

On October 13, analyst Bruce Silver will be joined by Pinellas County’s Ken Burke and Tom Shepherd of Global 360 for a panel discussion of how case management has transformed the Pinellas County court system. For more information, visit <http://www.global360.com/webinars/CaseManagementGovtOct09>. To read Bruce Silver’s whitepaper, *Case Management: Addressing Unique BPM Requirements*, visit [http://www.global360.com/xres/uploads/resource-center-documents/Case\\_Management\\_WP\\_final.pdf](http://www.global360.com/xres/uploads/resource-center-documents/Case_Management_WP_final.pdf).

### **About Global 360**

With more than 2,000 customers in 70 countries, Global 360, Inc. is a leading provider of Process and Document Management solutions. Global 360 is headquartered in Texas with operations in North America, Europe, Asia Pacific and South Africa. For more information, call 1-214-520-1660 or visit the company web site at [www.global360.com](http://www.global360.com).

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