GCloud14

Case Management

Driving Secure Digital Transformation

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Case Management

Summary

Case Management for the Cloud offers a comprehensive solution for organizations to efficiently track, manage, and resolve cases. With features like customisable workflows, document management, and reporting tools, businesses can streamline operations, improve collaboration, and ensure compliance. Experience enhanced efficiency, improved collaboration, and better decision-making with our cloud-based case management service.

Features

- Case Tracking: Monitor case progress and milestones effortlessly.
- Customisable Workflows: Tailor processes to suit unique case requirements.
- Document Management: Store and organize case-related documents securely.
- Collaboration Tools: Facilitate communication and teamwork among case stakeholders.
- Task Assignment: Delegate tasks and responsibilities to team members efficiently.
- Reporting Analytics: Gain insights into case trends and performance metrics.
- Time Tracking: Record billable hours and track time on cases.
- Email Integration: Capture and archive case-related emails for easy reference.
- Mobile Accessibility: Manage cases on the go, from mobile devices.
- Integration Capabilities: Seamlessly integrate with other business systems and applications.

Benefits

- Improved Efficiency: Streamline case management processes for enhanced productivity.
- Enhanced Collaboration: Foster teamwork and communication among case stakeholders.
- Document Security: Safeguard sensitive case information with robust management features
- Better Decision Making: informed decisions based on comprehensive case analytics.
- Time Savings: Automate repetitive tasks and reduce manual workload
- Client Satisfaction: Provide timely updates and resolutions, improving client satisfaction.
- Billing Accuracy: Track hours accurately, ensuring fair and transparent billing.
- Accessibility: Access case information anywhere, any time, for increased flexibility.
- Scalability: Grow your case management system as your organization expands.

- Compliance: Meet regulatory requirements with built-in compliance and reporting capabilities

Service Description

The Viewdeck Case Management Service is based on leading open-source products that provide a broad range of solutions to industry and commerce. The Service aims to simplify case management processes and to eliminate inefficiencies providing more time to work on resolving issues.
A core component is to streamline and automate complex workflows. The caseworker is presented with a single view of their tasks, instructions and associated content allowing them to make better informed decisions.

- Simple, yet fully functioned web-based Case Management Tool.
- Easy Integration into other applications.
- Supports M365 integration.
- Provides a fully functioned simple Document Management and Records Management service.
- Full Text Searching, and Relationships.
- Supports existing business processes.
- Mobile Case Management Platform.

Based on a variety of open-source solutions, the Viewdeck Case Management Service is a straightforward, Enterprise solution, which can be scaled from small teams to large organisations. Its Web architecture provides additional security, ease of deployment, and the ability to co-ordinate and share across organisations and agencies.
Viewdeck Case Management provides the ability to both scan and print one or more documents (batch scanning and printing). In terms of scanning then to solution supported both desktop scanning and centralised batch scanning. For desktop scanning the solution comes with a desktop scanning facility that allows to scan documents directly into a specific case.
The system supports the ability to import documents directly to a case either by drag and drop or using the Scanning import tool. Using the Scanning import tool allows the user to add additional metadata on import. The solution provides a folder import function allowing batch scanning and automatically import of documents to the respective cases (provided the scan results deliver means to identify the case). The system also provides a drag and drop import feature in MS Outlook that allows Case requests received by email to be dragged on to the case in question or to create a case and initiated the Case workflow directly from Outlook. A self-service module also allows Case Management (and other requests such as DPA, EIR, etc.) to be submitted on-line from where a Case (or relevant process type – DPA etc.) will be created and placed with the relevant team for processing. In addition to the case being automatically created, the request is added to

the case and contact information for the requester (including preferred means of communication) is also registered automatically.

All Channels

All correspondence within the Service (email, documents, recorded phone chats etc.) are contained within the case folder. The system also provides a drag and drop import feature in MS Outlook that allows Case received by email (or other request related emails between the requester and the team) to be dragged on to the case in question or to create a case and initiated the Case workflow directly from Outlook.

There is the functionality to generate and send emails. Uses can also pick up templates which allow when key information to be automatically inserted into the email. The system also allows users to use MS Outlook and store the output into the appropriate case file. This functionality is also available to other MS-Office tools such and Word and Excel documents

The Service also has the functionality to generate and send documents. Uses can also pick up templates which allow when key information to be automatically inserted into the document i.e., requesters contact details, key case outputs, standard paragraphs, sections, or pages.

The system comes with a comprehensive contact management capability that allows storing information about the applicant/requester such as communication details (address, email, phone, etc.), preferred means of communication, etc. The requests (cases) are linked to the applicant/requester and it is hence possible to easily find the request/case by applicant and see the previous requests made by a specific applicant.

Dashboard

The Viewdeck Case Management service provides a home page/dashboard where users can see all requests, actions, approvals, and tasks assigned to them. These can be filtered, for example by request type, due date etc.) and the resultant filter saved for future use. Team leaders or managers can view team workloads and redistribute or re-prioritise cases to ensure service level agreements SLAs are met. Whilst these are viewable on screen, the resulting output can be printed or exported for further analysis

Roles Based Access

Advanced Case Management support highly granular access control, where read and write access can be allocated on a number of levels, e.g., user, organizational unit, role, work position and groups.

Audit Trail

The Service provides a complete audit trail of activities within the system. Depending on the specific redacting tool selected, they also offer a complete audit log, which details what redaction searches were performed, what was found and redacted, whether a complete document verification was performed, and the total time spent on the document. They can also create a summary log, detailing what redactions were performed, what pages have which redactions, and the reason descriptions for any standard exemptions.

Tag Cloud

Case Management, UK Government, Public Sector, Workflow Automation, Data Security, Compliance, Efficiency, Service Delivery, Records Management, Decision-Making, Citizen Services, Legal Proceedings, Government Agencies, Data Privacy, Case Tracking, Process Optimization, UK Public Sector.

Appendix 2 : Terms and Conditions

1. In all products Support is calculated on the basis of a remote, off-site basis, and where necessary, a secure access service to the services is required at additional cost. For UKCloud Tier 1 Elevated services, the Secure Remote Access solution provides such a service.
2. Change Requests, Change Boards, and Change Management are not included and will be calculated at normal SFIA rates. As a service, patching and updates will be managed and coordinated by Viewdeck and, unless there is an impact to service, no notification will be provided. Regular, pre- approved change windows for minor outages will be agreed with the Client upfront.
3. Rates do not include ITHC activity. Most components have been checked previously, and where possible relevant information will be made available. Where possible, and as required, supporting an ITHC and the outcomes of the ITHC will be managed as a fixed price item (the cost will depend on the Client’s accreditation requirements).
4. Regular Service Reviews are not included, but can be added as a fixed cost package. The cost will depend upon the level of integration required into the client’s service architecture and federated service model. Standard 'out of the box' reporting from service management tools will be provided for 2nd and 1st line support packages only. 3rd line support functions are not included (assumed to be part of a 2nd line support function). Where tailored or alternative reporting is required, these will be provided as an additional item
5. In accordance with our Security Policy, Patches will be applied when appropriate, and unless of High Priority (CESG or other body), at the discretion of Viewdeck. We aim to patch all systems within 30 days for Repository or packaged applications. Third party application software will only be upgraded if major failures or issues exist, impacting usability, or on annual renewals. Upgrades can be done at the client's request as a chargeable item.
6. 1st Line support assumes clients can self-serve via the Support Portal, and will always be directed towards email/online support functions.
7. 2nd Line support assumes interfacing and triage is handled by a separate (Client) Service desk, with Viewdeck acting as a Resolver Group. Email and Online Service portal will help manage and coordinate.

8. 3rd Line support assumes all end user management, and investigation is provided by the Client's ICT support function/organisation, and liaison is restricted to technical, authorised and available resources.
9. Additional Support tasks that are passed through to Viewdeck inappropriately will be charged at the normal SFIA Rates.
10. Viewdeck takes no responsibility for the functionality or the performance of these applications, open source solutions or their components. Where possible, software functionality will be baselined and agreed at commissioning. Downstream operational issues will be fixed, and best endeavours used to maintain service, but responsibility for third party software does not lie with Viewdeck. Liability is limited to the Value of the Termination of the Contract.

Appendix 3: Viewdeck Support

The Viewdeck Support and Service Desk function provides a range of options to meet a clients specific requirements, based upon service and business need. Support channels include telephone, web, Slack (Chat) and email to users of the service. The service provides an ITIL aligned help desk, with standard reporting, incident management and problem management processes using an application tool-set, with SLA management and customer reporting.

Viewdeck support helpdesk is available, during UK working hours, to log support calls for any incidents. Standard support hours can be extended by agreement. Each customer call is logged in our remote management system which provides a unique call reference number enabling issue tracking and enabling ease of exchange of information during incident resolution process.

Our fully trained team work directly with our clients to manage and resolve support queries using telephone, chat, remote access and, if necessary, on-site visits.

Our Standard Support function provides monthly service level reports, remote problem management support and monthly client reporting to provide integration into the client's service architecture and federated service models.

Our Service Desk can offer 1st, 2nd and 3rd line support depending upon client needs.

Support Level	Hours	Description
Bronze	9am -5pm Weekdays (UK Working Days, Excludes Bank Holidays)	Support aligned to UK working day. Telephone and email support as standard. Monthly reporting is provided.
Silver	9am – 5pm, 7 days a week (Excludes Bank Holidays)	Support aligned to UK working day including weekends. Telephone and email support as standard. Monthly reporting is provided with quarterly service reviews.
Gold	24 hours, 7 days per week	Support function and Service Desk are aligned to global working. Chat also included via Slack as standard. Monthly reporting is provided with quarterly service reviews, plus a named service manager.

The Viewdeck Service Desk can provide the following support options to suit the customers and business needs:

Support Option	Description
Managed Support Option 1st, 2nd and 3rd line support	Customer end/business users directly interface to Viewdeck 1st line Service Desk provided. Viewdeck also provide: • 2nd line service support providing configuration level remediation 3rd line technical change and technical support to clients technical resolver groups
Configuration & Technical Support Option 2nd and 3rd line support	Customer Business users are managed by their own Support Desk function. Configuration and Technical issues are escalated to the Viewdeck Service Desk by the Client Service Desk. Viewdeck only provides: • 2nd line service support providing configuration level remediation 3rd line technical change and technical support to clients technical resolver groups
Technical Support Option 3rd line support only	Customer Business users are managed by their own Support Desk function. Configuration level issues are resolved by client resolver teams. Technical issues are escalated to the Viewdeck Service Desk by the Client Service Desk. Viewdeck only provides 3rd line technical change and technical support to clients technical resolver groups

Incident Management

Viewdeck classifies incidents raised at its service desk using the following P1 – P5 Priority Code. Incidents raised with the Service Desk will be triaged and responded to within 30 Minutes and then actioned accordingly in priority order.

- P1 Total loss of service to all users.

- P2 Some loss of critical service for some or all users.
- P3 Limited loss of service or work around possible limiting loss experienced.
- P4 Tasks are made more difficult but are not impossible to complete.
- P5 Interferes with non-operational use.

Urgency of Response			
Priority code	**Urgency of response**	**Target response (within core hours)**	**Target resolution (within core hours) (M-F x 9-5)**
P1	Immediate, sustained effort using all necessary and available resources until service is restored.	Immediate response, action within 30 Mins (Enterprise 24x7) , 1 hour (Outside Support Hours).	4 hours
P2	Immediate response to assess the situation, staff may be interrupted and taken away from low or medium priority jobs.	Immediate response (within contracted Service Hours), action within 2 hours.	1 working day
P3	Response using standard procedures and operating within the normal frameworks.	Email notification of call being logged (within contracted Service Hours) 1 hour. Response by email or phone within 1 working day.	2 working days
P4	Response using standard procedures and operating within the normal frameworks as time allows.	Email notification of call being logged (within contracted Service Hours) 1 hour. Response by email or phone within 1 working day.	5 working days
P5	Response using standard procedures and operating within the normal frameworks as time allows	Email notification of call being logged (within contracted Service Hours) 1 hour. Response by email or phone within 1 working day.	10 working days

Our Service Level Objective aims to resolve 90% of incidents within the target resolution time.
All P1 and P2 events are allocated an Incident Manager to oversee and manage incidents through to resolution. Client help desks or Resolver Groups will be informed and updated as the incident resolution evolves. The Incident Manager will act as a SPOC for the client, providing regular reporting and will coordinate activity between various resolver groups as necessary to ensure successful resolution.

Appendix 4 : About us

Why is Viewdeck Different?

- **Value** - As a specialist SME, we can bring big company/ex Big 4 consultancy experience with niche specialist value.

- **Insight** - Having delivered across the Public Sector, Client Side and Supplier Side, our senior team bring more than just delivery capability, they bring insight and a network of relationships.

- **Experience** - Wide range of technical delivery support to MOD, SLC, SIA, Cabinet Office, NCA, Home Office, DVLA, Department of Education, FCA.

- **Win** - Our team have delivered £100m's of savings to HMG in the past few years by re-negotiating ICT contracts.

- **Diligence** - Our team worked regularly in secure government agencies. Our people, processes and capabilities support secure quality and assurable deliveries. ISO 27001 certified.

- **Energy** - Uplift your programme with new skills, new experiences, and new insight.

- **Collaboration** - Proven client support, skills transfer. Delivery through client/Viewdeck joint collaborative working.

- **Knowledge** - Specialist in Architecture, Cloud Solutions, HMG Transformation, and Leaders in HMG ICT programmes.

Offering Value for Money

Approach

- Expert skills and resources, Real world experience.
- Strong domain knowledge.
- Buddy/duplication of services/capabilities.
- Utilise existing staff, skills transfer, embed, upskill.
- Iterative/Agile, rapid reaction to changes.
- Re-use where applicable.
- Strong Comms, lasting legacy, easy to adopt, real artifacts.
- New Ways of working.

Outcome

- Efficient coherent delivery, with less time reworking or 'learning on the job'.
- Swift subject understanding, minimise learning and false assumptions.
- Risk reduction of delays through single points of knowledge and absence.
- Minimise Consultant spend, ensuring timely efficient handovers to client.
- Speedy product creation, less time pursuing wrong directions.
- Less time re-inventing capabilities, best value for money in delivery.
- Investments reused create more downstream value for the client.
- Enthused and interested workforce, more able to rapidly accommodate change and hence increased efficiency.

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