



MICROSOFT DYNAMICS 365

CASE MANAGEMENT AND REFERRALS

Service Definition

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Overview of Services

Axis12 offer a case management and referrals system built to integrate with Microsoft Dynamics 365 and hosted on Microsoft Azure.

Our team have been providing digital case management and referral services to government departments for over 15 years. These include services that handle highly sensitive data such as information about mental health). As well as our Case Management and Referrals solutions, we also provide Inspection software that integrates directly with Dynamics365 - Inspector 365.

Our specialist system will enable you to make the most of the powerful AI driven insights, features and the flexibility of the cloud. It is aimed at organisations that are already using Microsoft Dynamics 365 and want to leverage these tools for case management, as well as business who are looking to make the move to Microsoft Dynamics 365 and want to include case management and referrals as part of this. Our consultancy covers setup, specification, development, testing, release and support.

Axis12 also offer Microsoft Dynamics 365 consultancy services, which can be delivered as a one-off project, or we can give you on-going support, for both specific and general MS Dynamics 365 projects. We can work with your team on site or remotely. Either way, we will use our experience and skills from big, challenging projects to deliver sensible, efficient, and cost-effective solutions.

SharePoint Integration



Our Microsoft Dynamics 365 Case management and referrals solution can be integrated seamlessly with SharePoint giving you direct access to relevant files and folders. This setup allows you to create folders of evidence for each individual inspection as required.

The SharePoint integration also gives you the option of co-authoring or collaborating on documents as a team, especially relevant for inspections which involve auditing.

Your team can set up and manage granular document and folder permissions, so you can control who does or doesn't have access, this includes providing external viewing options when required.

Microsoft Teams Integration



Use our Microsoft Dynamics 365 Case management and referrals system directly within Microsoft Teams, using channels to work directly on inspections and edit and share documentation.

Your business can use utilise the Teams integration to leverage other collaboration platforms such as PowerBI, OneNote and Office Graph to assist with the collaborative aspects of inspection management.

Using Microsoft Teams, also allows your inspection personnel to use any device from anywhere, safe in the knowledge that they are adhering to UK Government cloud security principles.

About Microsoft Dynamics 365



Microsoft
Dynamics 365

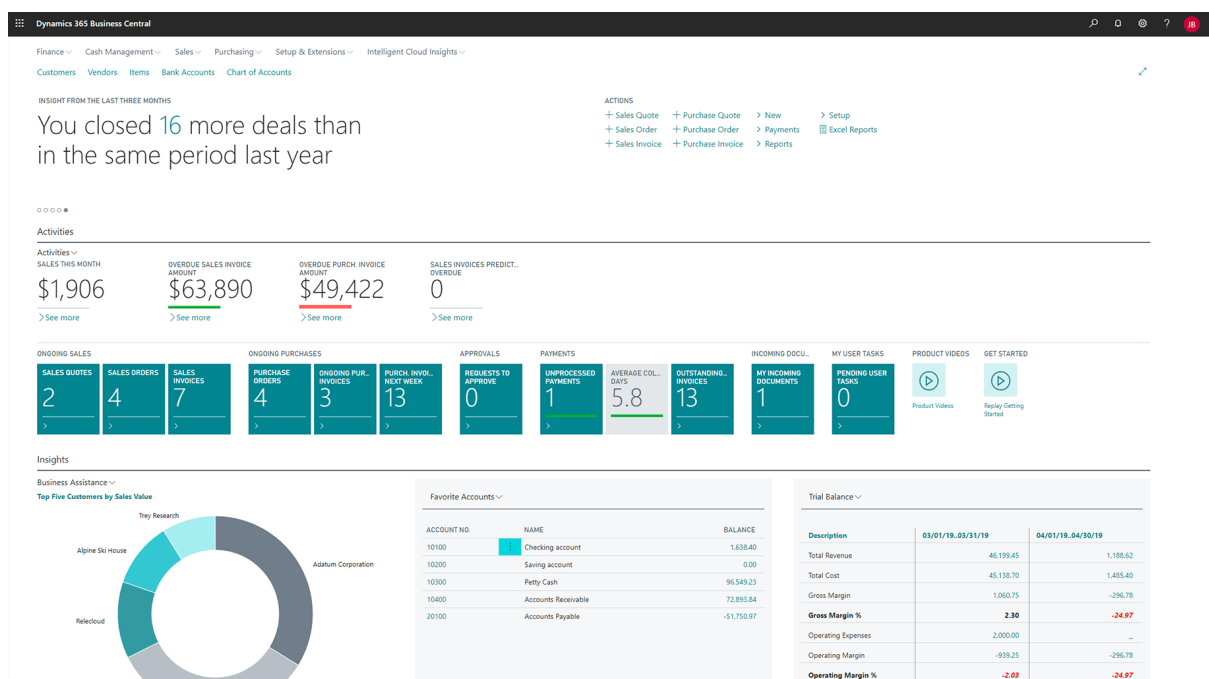
Microsoft Dynamics 365 is a set of intelligent business applications including sales, marketing, service, operations, and commerce. Using MS Dynamics 365 helps you to see your business and customer data in one place. Providing you with a 360-degree view of your organisation, including real-time AI-driven insights to help you make better decisions and gain better results.

Highlights

- Built on a common data model for CRM and ERP applications
- Pulls together all types of customer data
- Reduces cost from multiple departmental applications
- Improves productivity, effectiveness and efficiency
- Provides access to real-time insights
- Is accessible from any device, anytime, anywhere

Key Features

- Integrates seamlessly with Microsoft 365
- Easily connects data from various sources and/or systems
- Delivers greater results through predictive, AI-driven insights
- Includes applications for Sales, Marketing, Service, Finance, Operations, Commerce and HR
- Brings together unconnected systems - CRM, ERP, Microsoft 365, Azure
- Replaces time-consuming, repetitive manual tasks with connected processes
- Scales up or down based on requirements



Areas of Expertise

Axis12 have been a Microsoft Partner since 2014, integrating with many Microsoft 365 applications (MS Dynamics 365, SharePoint, Azure, OneDrive, Teams, One Note).

As well as having expertise in Microsoft Dynamics 365, our team are also well-versed in Microsoft Azure (an area often required in MS Dynamics 365 projects). We can also provide Managed Azure Services if required.

Our specific areas of expertise are as follows:

- Architecture specification and implementation
- Site specification and design
- Developing responsive and engaging themes
- Integration with external systems through SSO's and API's
- Functional, user acceptance and usability testing
- Project management and coordination
- Agile development and Scrum mastering
- Site resilience, performance and security
- Release management

Technologies: Varnish, Solr, Nutch, Mule ESB, Drupal, Django, Linux, Symfony, MySQL, Mongo, XML, XSL, Python, Java, Hadoop, h-Base, HA-Proxy, NGX, PHP, Javascript, Postgres, Git, jQuery, Swift, Jenkins, Puppet, and many more.

Quality Assurance



Code Quality

All our developers are experienced in working to the highest open source coding standards and have committed code back to the open source community.

However, to ensure the quality of the code we produce is always of a high standard, we have our own open source coding quality assurance process which goes far beyond simply adhering to open source coding standards. We believe that we have one of the most stringent code QA processes in our sector, and our commitment to quality is embedded in our staff on-boarding process and forms an integral part of our overall ISO 27001 certification.

All our development team continually check their code against this process and senior members of our technical team check all code before it is approved to be included in a release.

We ensure high quality code by:

- Ensuring all coders develop according to open source coding standards
- Where a specific open source coding standard is not detailed, ensuring that code is written according to best practice standards
- Running automated tests to check the adherence to these standards
- Peer review of all commits means only reviewed and approved code is released



Quality in Delivery

We ensure consistent quality in our delivery through the planning, setting and implementation of specific and measurable quality objectives. Our dedicated Account Manager, in consultation with our client's project team, will work together to produce quality objectives with associated milestones, which will then be constantly monitored throughout the delivery process.

Three vital aspects of securing quality delivery are risk, change and cost management. Identifying, monitoring and mitigating risks are a key part of successful delivery.

We recommend the use of a Service Level Agreement to ensure all parties are clear about responsibilities, key milestones and quality standards. We have found this approach assists in balancing out cost and quality of services in order to provide the client with best value for money. We view a successful project as one that continues to form a key part of a client's digital strategy in the months and years after it has been delivered. It is therefore in our interests to ensure that the client takes a hands-on approach to all products we deliver during all phases of their delivery.

Using this definition of success, it makes no sense for us to take a unilateral approach to delivering a project - we actively encourage the client to fill key roles whether that be as testers in our scrum team, or product owners - we view it as essential that the client takes a hands-on role and that the delivery team has representatives from all stakeholders in the business.

- For clients such as Care Quality Commission, the business analysis and product ownership roles were kept in-house and formed integral membership of the scrum teams provided by Axis12.
- For the Tate Gallery we worked with Tate's in-house Java team (who managed the huge collections repository database), as well as some of their designers, in a tightly knit team

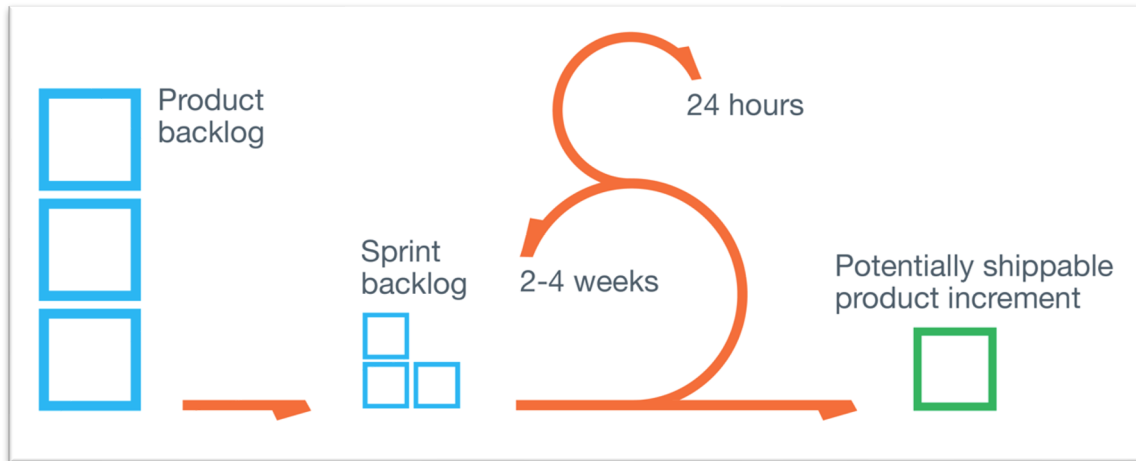
We have a comprehensive quality management system that is continuously monitored and updated to ensure that all services and products are of the highest standards of quality and reliability.

We strive to be the best provider of open source web enterprise services in the industry. Through the use of several principles, everyone in Axis12 is accountable for fully satisfying our customers by meeting, or exceeding, our clients' needs and expectations with first class solutions and services.

Methodologies and Approach

All our consultants are experienced in both PRINCE2 and AGILE project management. By clearly defining the phases of the initial delivery – from discovery and concept to design and development – we can choose the method that fits best with your organisation.

An Agile approach (e.g. SCRUM) can be extremely effective in offering you early sight of software, rapid development, incremental delivery and regular prioritisation of features.



The Agile Process

Waterfall methods (e.g. PRINCE2) are preferred by some clients because they allow monitoring of progress via more traditional means – such as detailed project plans and Gantt charts – that are more in keeping with their internal governance structures.

Our team have also developed ways to use a blended approach effectively, providing agile and rapid delivery with flexibility of prioritisation and specification alongside the structure, accountability and predictability that comes with a Waterfall approach.

Our project delivery is supported by systems that manage the detailed specifications, including acceptance criteria, user stories and results from functional and non-functional testing. These are available to our internal staff, and staff from third parties and partners to ensure clear specifications are available to everyone involved in the delivery.

Pricing

Please consult separate pricing document for details of our pricing.