GCloud-15

viewdeck

Driving Secure Digital Transformation

Case Management (SaaS)

Service Definition Document

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Case Management

Summary

Case Management for the Cloud offers a comprehensive solution for organisations to efficiently track, manage, and resolve cases. It can be configured by organisations into a cloud-based application to address many case management based business applications. 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 organise 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.

Multichannel

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 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 reprioritise 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.

Incident Management

Viewdeck classifies incidents raised at its service desk using the following P1 – P3 priority. Incidents raised with the Service Desk will be triaged and responded to 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.

Priority	Response type (during standard business hours)	Target resolution (Mon-Fri 9-5)
P1	30 minute response, sustained effort using all necessary and available resources until service is restored.	4 hours
P2	4 hour response to assess the situation, staff may be interrupted and taken away from lower priority jobs.	1 working day
P3	One working day response using standard procedures and operating within the normal frameworks.	3 working days