

digital business solution
case manager

Organize your processes to a new standard with digital case management

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Case management – the engine for your digital business processes

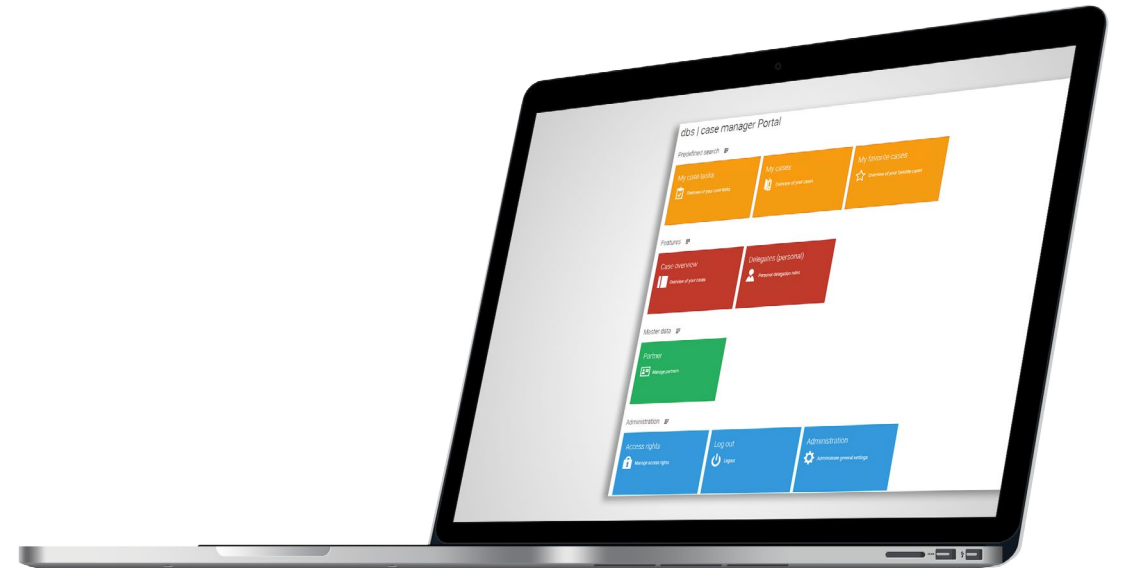
Wherever you look, cases are shaping the work and ideas in every area of your company. From support processes to core processes – a new standard in case organization is playing an increasingly decisive part in achieving success.

A case lets you group together all the issues and business you need to organize, communicate or put on record. In practice, however, that often appears as follows: Documents are stored and filed away in (digital) folders. Task lists are recorded in Microsoft Excel, Microsoft Outlook or even in writing. Coordination with colleagues and business partners takes place in parallel by e-mail or phone. The result is that everything is carried out in a process-oriented way but without a central focal point. Under such conditions, it is very difficult to keep track of all the activities in an individual case and, more importantly, to keep an overview of the process as a whole.

To overcome this challenge, you require a digital case file that lets you bundle all the activities involved in a case in one central system that provides transparency and traceability. With d.velop case management, you can standardize structured job assignments while also retaining the flexibility needed for your processes.

An overview at all times

As the central hub for all the activities involved in a case, digital case management gives every authorized employee an overview of progress made at any time and from anywhere. Extensive overviews with convenient evaluation functions highlight important information and let you organize and track all your pending tasks with transparency.



dbs | case manager is the perfect way to get started with case management.



Flexibly standardized

First, define the case types you want to use to bundle all your information and activities in digital form. Add a phase model that helps you keep a clear overview of the status of your cases. Finally, create task templates for recurring activities that actively help and guide everyone involved in the process of organizing their activities effectively. Whether you use pre-structured processes or more flexibly designed checklists and ad hoc tasks, you decide on the extent of flexibility needed, depending on the status or type of case. Create free spaces where your staff can use their experience and drive to fulfill their potential.

Process modeling made easy

Case types, case statuses and task templates are so easy to configure that process modeling responsibilities can be handed over to department heads or process managers without having to involve IT. Process definitions can be implemented and adapted in steps and offer room for continuous improvements.

Collaborative and comprehensible

The options for internal and external conversations are shown directly within the case. For instance, staff within your company can exchange information about a case and discuss it in a completely uncomplicated and clear way, but can also include external contacts such as service providers, partners and others in the

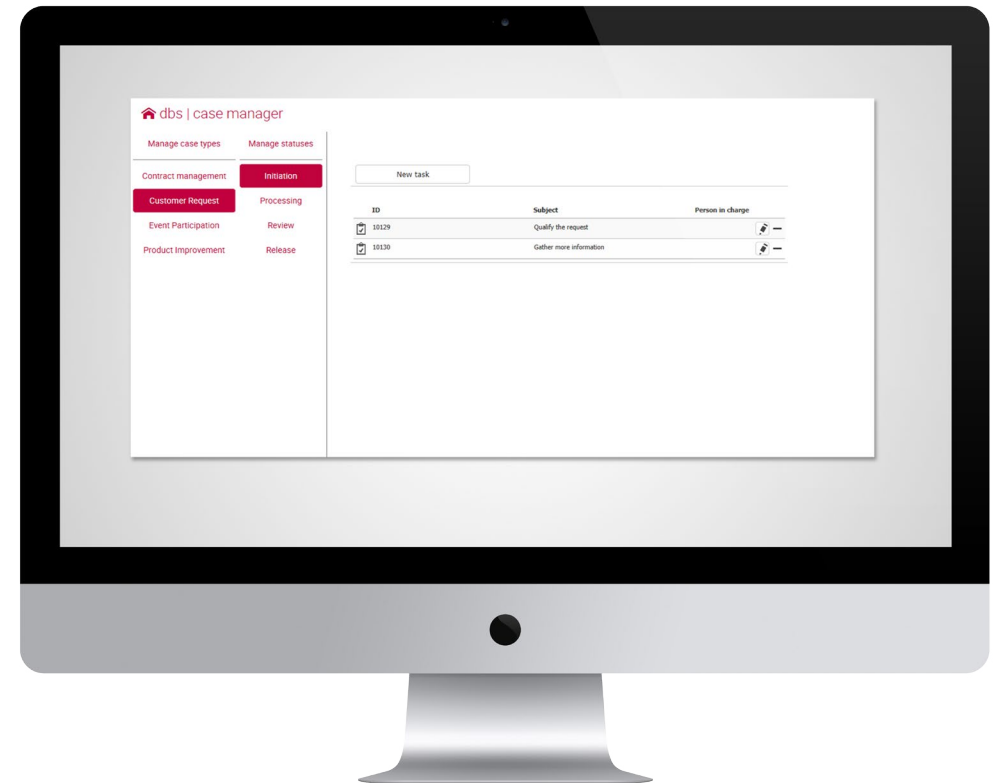


Image: Editing case types in the configuration overview.

conversation at the same time. As a result, everyone has clarity and transparency regarding which decisions or work steps have been put in place for a specific process. Last but not least, every activity carried out as part of the contract process is documented in-depth in a log of progress which is available to view for years.

Seamlessly integrated

The dbs | case manager solution consolidates storage, case administration and task management in one central system and integrates seamlessly with leading systems such as ERP or your e-mail client with the help of modern HTML5 technologies. That means you can continue working directly in the solution throughout the case without exiting and opening programs. If, for instance, you receive a customer request by e-mail, you can start the case for this request directly from your e-mail program. The dbs | case manager lets you keep all your cases under control – the recipe for success in digital business processes.

Highlights

- Every activity in a case is bundled into one central source and made available digitally
- Transparency and oversight over the status of all your cases and tasks
- Support tool for the shared work in a case
- Internal and external conversations integrated into the case
- Process modeling performed by business users – flexible and simple
- Work in steps to achieve the optimum process – continuously adapt and develop your processes
- Standard scope of supply includes free space for customer-specific customizing
- Web-based case management allows for integration with your working environment (e-mail client, Office application, ERP and so on) while keeping the same interfaces



Digital case files

Bundle related documents, information, tasks and even conversations in one case file with access to all the features of a professional document management system.

Task management

Organize your work to a new standard – structure your tasks in cases and provide transparency regarding work still to be completed and the deadlines involved.

Conversations

Manage internal and external conversations directly from the case and use them to create whole new possibilities for collaboration.

Integration

Integrate case manager with your leading applications, including your e-mail client or financial accounting system.



Activities stream

Track case activities with transparency at all times: For instance, find out who added a document, who performed a task or who responded to a conversation.

master data

Define your case types and their phase model. Adapt the details of your specific case types with flexibility.

Business process optimization

Standardize processes and methods while retaining the necessary free space for your staff. Task templates and status models provide a flexible framework for recurring daily tasks.

Case overview

Convenient filter and evaluation functions offer transparency over all your cases, tasks and deadlines. For instance, you can see instantly the processes in which progress has recently been made.

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d.velop AG, founded in 1992 and based in Gescher, Germany, develops and markets software for the complete digitization of business processes and industry-specific procedures. By adding mobile apps as well as standardized and custom SaaS solutions to its established ECM portfolio of services relating to document management, archiving and workflows, the software manufacturer has also expanded to offer managed services. Those services include sophisticated compliance management to provide legal certainty and ensure compliance with all statutory regulations.

d.velop helps companies and organizations to realize their full potential by providing digital services that connect people with one another and that simplify and redefine workflows and cases. A strong global network of around 150 specialized partners ensures that d.velop Enterprise Content Services are available worldwide.

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The actual implementation of the solution is company specific and can differ from the described functions.