CASE MANAGEMENT

ABSTRACT

Unlock unparalleled efficiency and control with Case Management, your comprehensive content management solution powered by Microsoft's robust cloud infrastructure. Seamlessly integrated and 100% web-based, our platform combines Content Editing, Conversion, and Distribution functionalities to revolutionize your workflow.

With our customizable Content Editing module, effortlessly tailor workflows to your exact specifications. From content submission and task assignment to version control and metadata management, automate every step while maintaining complete oversight.

Leverage our Conversion module to effortlessly transform your content into a myriad of popular formats - whether it's converting simple documents to PDF or executing intricate XML conversions; our platform handles it all with precision and ease.

And when it comes to Distribution, rest assured that your approved content will reach its intended audience on time, every time. Define distribution rules and schedules to ensure seamless dissemination across various channels and partners.

Experience the power of Case Management and elevate your team's productivity to new heights. Say goodbye to manual inefficiencies and hello to a streamlined content management experience.

KEY CHALLENGES

The following are a few key challenges faced by content publishers.

Time-Consuming Publishing Processes

Manual oversight from start to finish leads to lengthy publishing timelines, hampering team productivity and increasing the likelihood of errors. Each human-centric step, from content search to conversion, adds unnecessary delays.

Complexity in Content Management

Editors and authors juggle multiple content items simultaneously, facing shifting priorities. Even with modern tools, managing workload complexities remains daunting, affecting overall efficiency.

Frustrated Editors and Authors

Without automated support for tasks like content search, task assignments, and version control, editors and authors spend valuable time on repetitive tasks, leading to frustration and decreased morale.

Lack of Standardization

Absence of automated solutions results in inconsistent processes and communication methods among team members. Management struggles to gauge productivity and identify bottlenecks, while editors and authors face increased workloads due to the lack of standardized procedures.

Compliance Risks

Content approvals scattered across emails and personal devices pose compliance challenges. During audits, teams expend significant effort locating necessary approvals, risking non-compliance and potential penalties.

KEY BENEFITS

Case Management has significant benefits for you. Here are a few key benefits.

Unparalleled Productivity

With Case Management, your teams operate at peak efficiency, thanks to extensive automation. Time-consuming tasks such as editing management, manual conversions, and metadata handling are seamlessly handled by our platform, freeing up valuable time for more strategic endeavors.

Streamlined Processes

Leverage Case Management's robust reporting capabilities to pinpoint areas for process enhancement and identify bottlenecks. Empower your teams to optimize workflows, ensuring smoother operations and increased throughput.

Time-Saving Solutions

Experience dramatic reductions in editing and publishing time, from weeks to mere hours, with Case Management's automation and standardization features. Effortlessly organize content, conduct powerful searches, and track approvals and pending tasks via intuitive dashboards, saving invaluable time at every step.

Enhanced Collaboration

Foster a culture of seamless collaboration between content authors and editors with Case Management. Our platform facilitates frictionless editing, conversion, and distribution processes, empowering teams to generate content at an accelerated pace while maintaining quality and consistency.

KEY CASE MANAGEMENT FEATURES

Case Management has several features that address the challenges and offer benefits mentioned above.

Informative Dashboards

- **Role-based Dashboards**: Tailored dashboards in Case Management deliver pertinent information to users, facilitating swift action within their roles.

- **One-Click Access**: Users access vital information effortlessly with a single mouse click, ensuring efficiency and productivity in their tasks.

- **Customizable and Personalized**: Administrators wield extensive configurability, molding dashboards to suit specific needs. Personalization based on user permissions ensures each individual has access to the most relevant insights for their role



Figure 1: Dashboard Summary

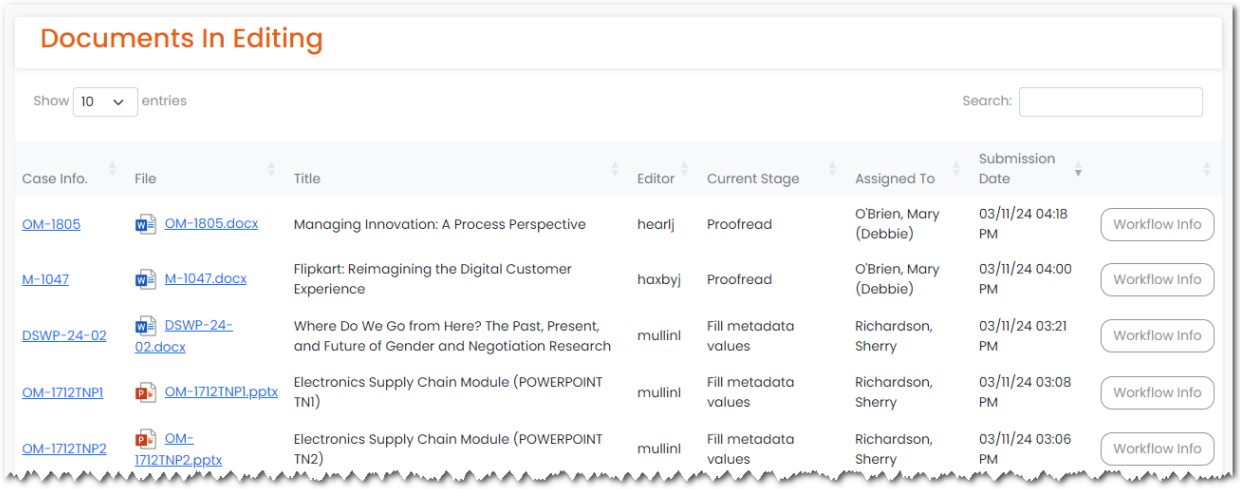


Figure 2: Get Documents of Interest on the user dashboard.

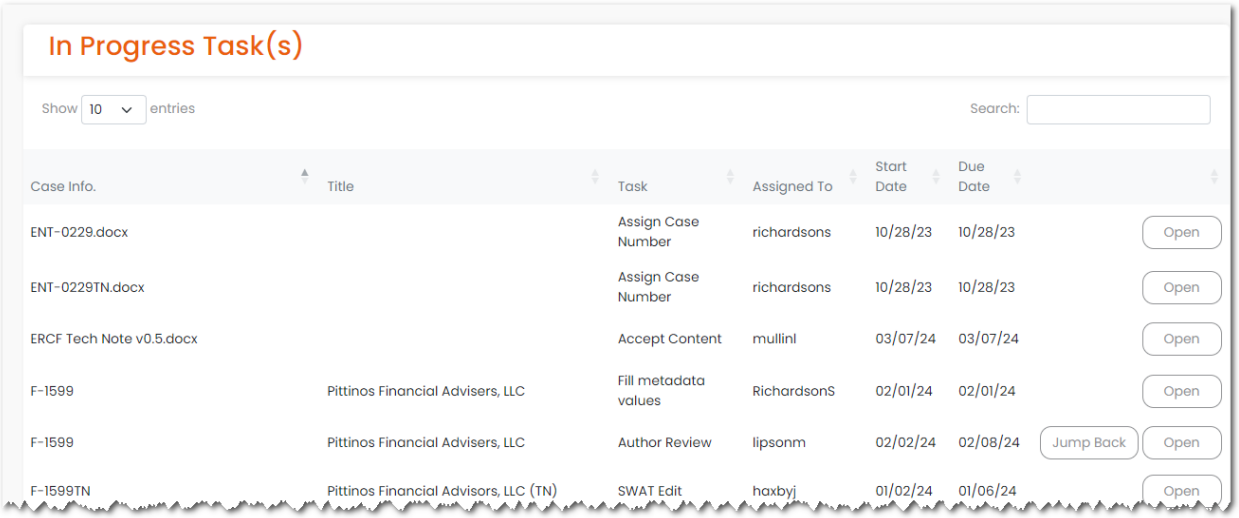


Figure 3: Tasks at your fingertips.

Powerful Search

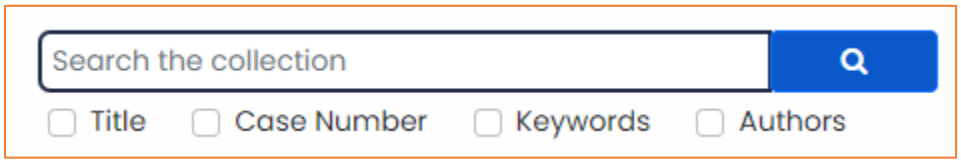


Figure 4: Powerful Search

- **Universal Search Capability**: Search functionality is seamlessly integrated into every screen within Case Management, ensuring users can swiftly access relevant information regardless of their location within the platform.

- **Flexible Search Options**: Benefit from both generic and specific search capabilities. Generic search allows exploration of metadata across all fields, while specific search can be tailored to prioritize the most pertinent metadata for your users.

- **Lightning-fast Results**: Experience rapid search results presentation, complete with actionable buttons for immediate follow-up actions. Case Management dynamically considers the user's permissions, ensuring only authorized content is displayed in the results.

- **Multi-format Results**: Users with appropriate permissions gain access to all available converted formats within search results, enabling quick retrieval of the desired content format. Facilitating seamless downloading, users can swiftly obtain the required content format with ease.

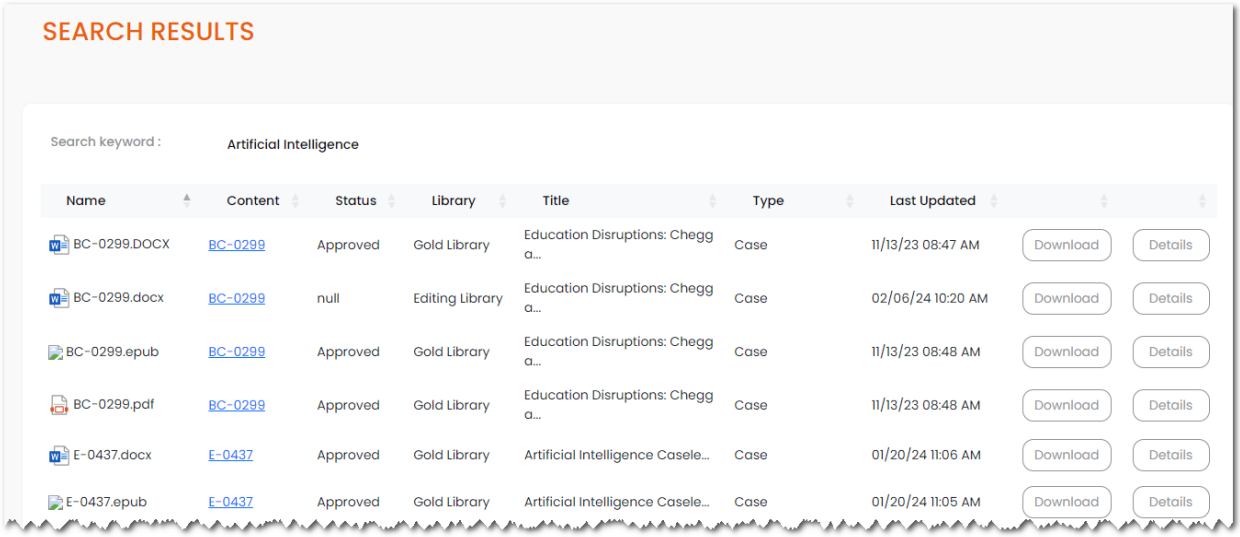


Figure 5: Accurate Search Results.

Configurable Workflow/Process Template

- **Customizable Workflow Templates**: In Case Management, processes are structured as flexible Workflow templates. Each template can encompass multiple steps, representing various editing processes tailored to your needs.

- **Comprehensive Configuration**: With Workflow templates, you have the freedom to configure all essential details required for complete process automation. Whether it's defining specific tasks, assigning roles, setting deadlines, or establishing approval protocols, Case Management offers the flexibility to accommodate your unique workflow requirements.

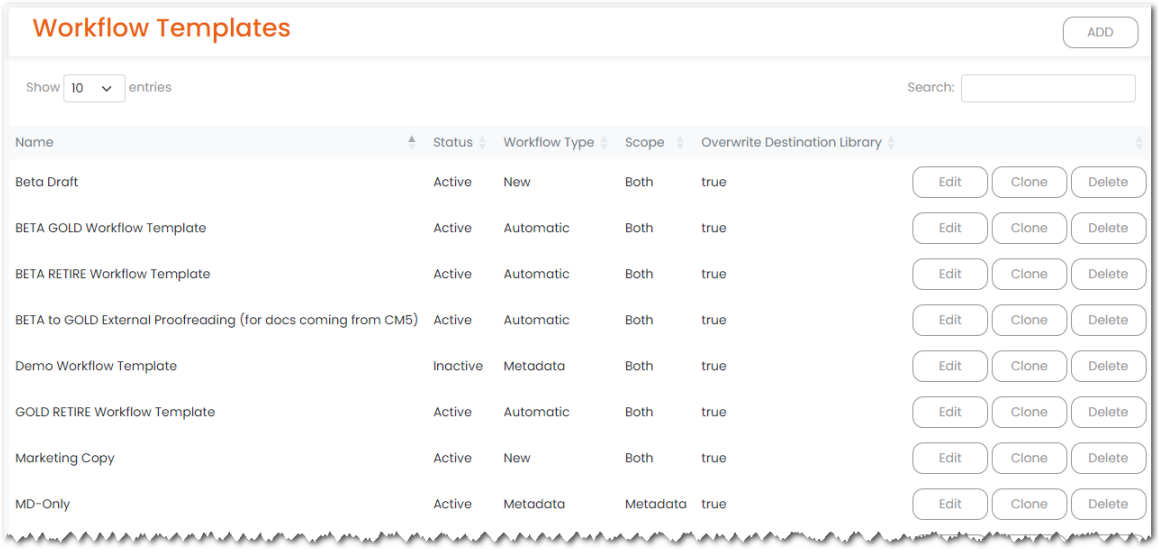


Figure 6: Workflow Templates Depict Your Processes

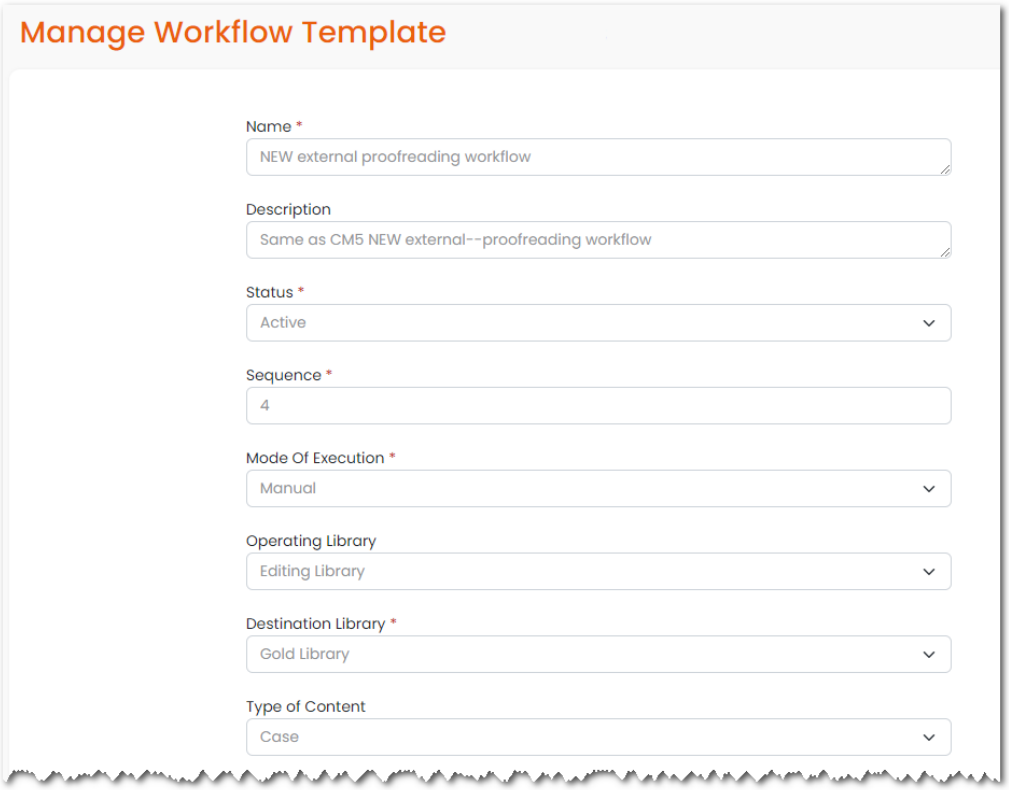


Figure 7: Workflow Templates are flexible.

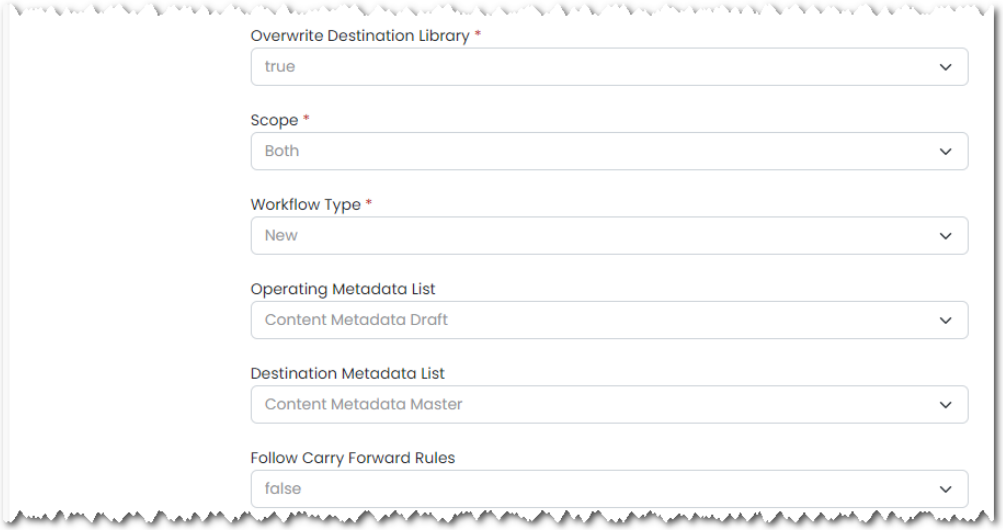


Figure 8: Template flexibility enhances automation.

Intelligent Process Steps

- **Flexible Step Sequencing**: With Workflow Templates in Case Management, steps can be executed sequentially or in parallel, offering unparalleled flexibility in process execution. Whether it's proofreading, approving, formatting, reviewing, or any other task, each can be defined as a separate step within the template.

- **Configurable Steps**: Each step within a Workflow Template is highly customizable, allowing you to tailor the parameters to match your specific process requirements. Case Management ensures that all process steps can be seamlessly automated, streamlining your workflow for maximum efficiency..

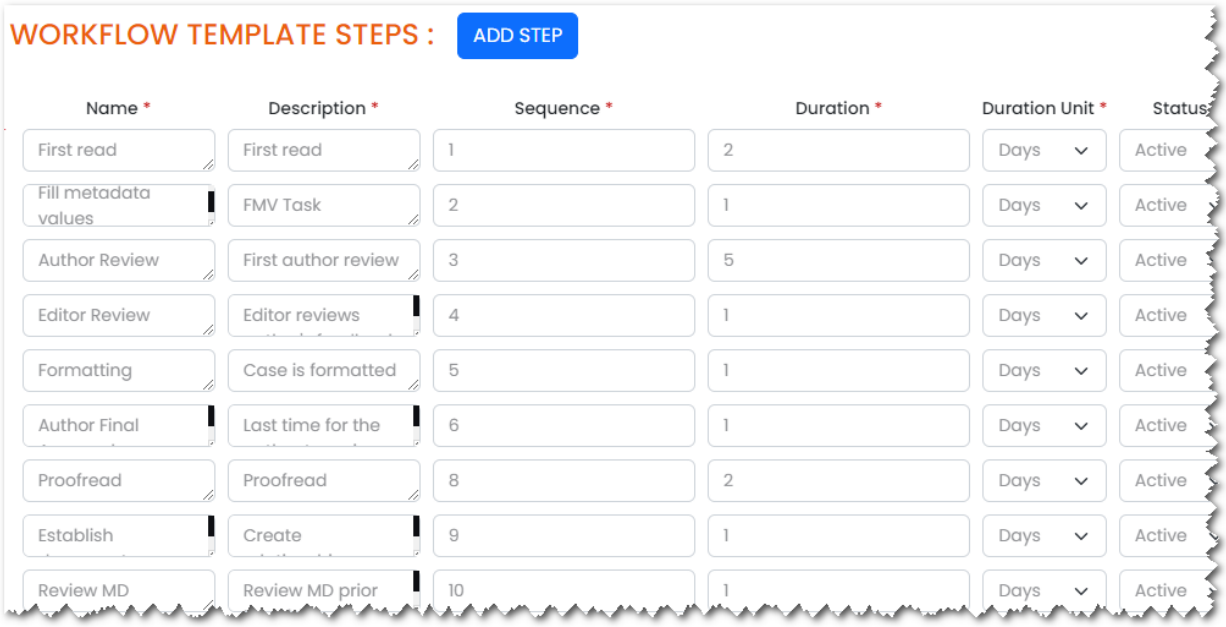
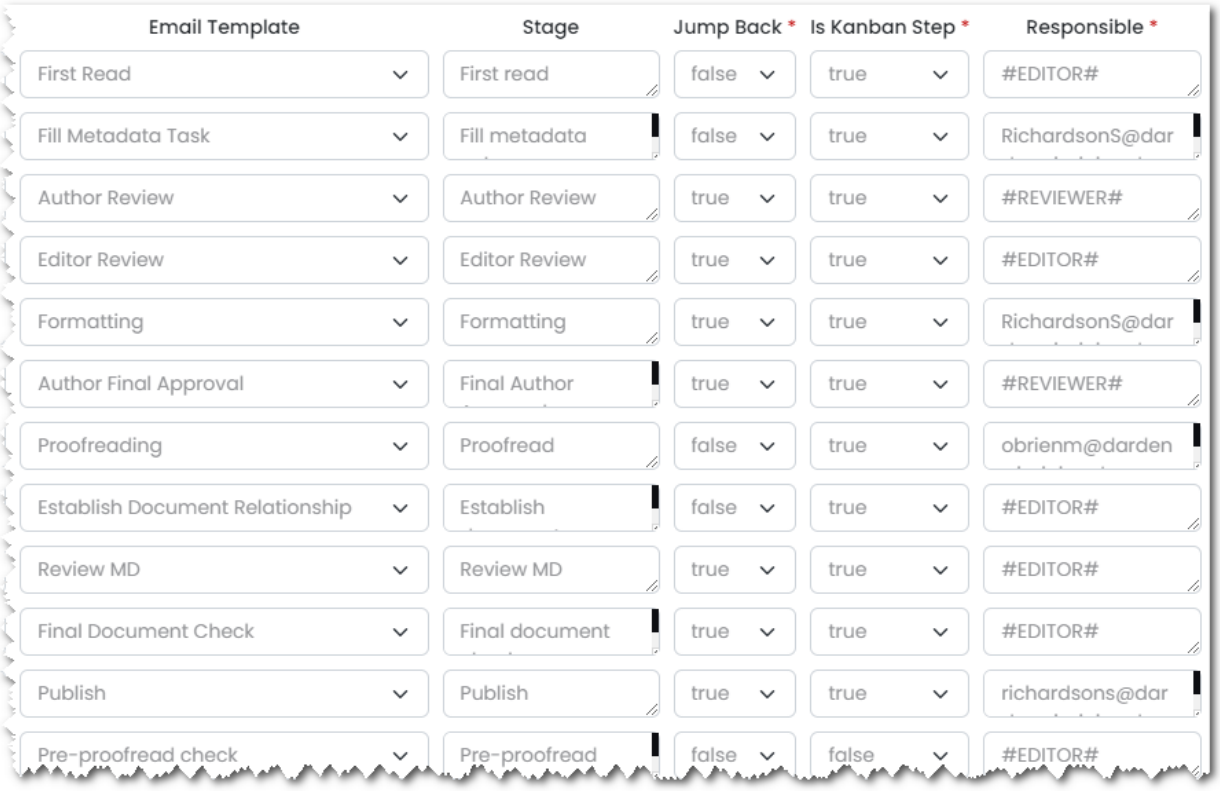


Figure 9: Workflow Template Steps

- **Dynamic Workflow Control**: Case Management introduces the jump-back functionality for Workflow Template steps, enabling fluid movement backward in the workflow when necessary. If a previous step remains unsatisfactorily completed, authorized users can trigger jump-back, allowing for seamless reassignment of the task to the responsible individual.

- **Flexible Assignment Options**: Assignments within each step can be directed to either specific individuals or roles associated with the content. This versatility ensures that each Workflow Template remains reusable across multiple content items, optimizing efficiency and promoting consistency across your processes.



Email Template	Stage	Jump Back *	Is Kanban Step *	Responsible *
First Read	First read	false	true	#EDITOR#
Fill Metadata Task	Fill metadata	false	true	RichardsonS@dar
Author Review	Author Review	true	true	#REVIEWER#
Editor Review	Editor Review	true	true	#EDITOR#
Formatting	Formatting	true	true	RichardsonS@dar
Author Final Approval	Final Author	true	true	#REVIEWER#
Proofreading	Proofread	false	true	obrienm@darden
Establish Document Relationship	Establish	false	true	#EDITOR#
Review MD	Review MD	true	true	#EDITOR#
Final Document Check	Final document	true	true	#EDITOR#
Publish	Publish	true	true	richardsons@dar
Pre-proofread check	Pre-proofread	false	false	#EDITOR#

Figure 10: Workflow Template Steps are highly configurable.

Streamlined Workflow Instances

- **Dynamic Workflow Instantiation**: For every content selected for editing, Case Management generates a unique Workflow Instance, mirroring one of the assigned templates. Additionally, administrators have the option to configure auto-assignment of templates, further streamlining the process.

- **Centralized Management**: The Workflow Instance Dashboard serves as a centralized hub for editors and administrators to oversee and manage the editing process for each content item.

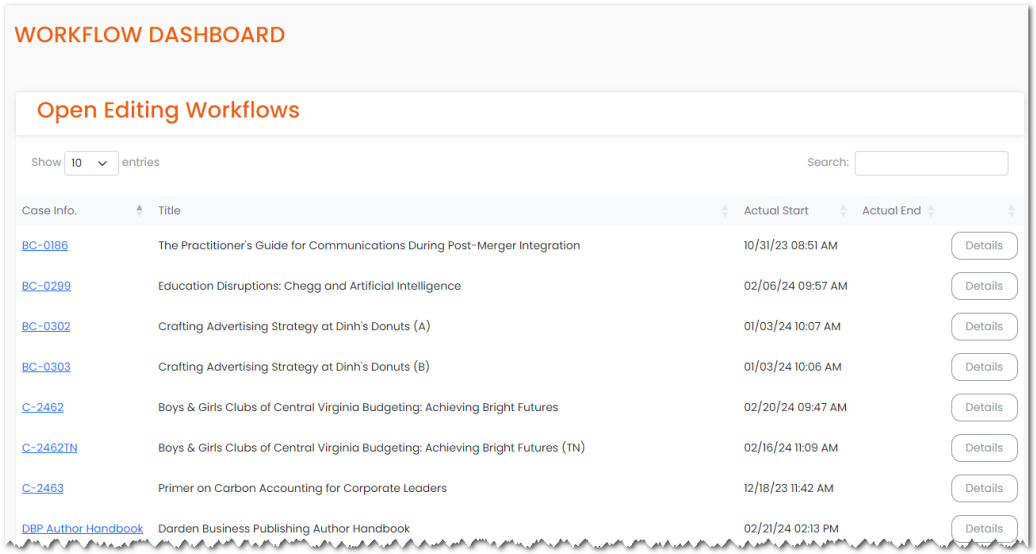


Figure 11: Streamlined Workflow Instances

- **Workflow Segmentation**: In Case Management, Workflow Instances are categorized based on distinct workflow types. For instance, one instance may represent the Editing Workflow, while another may depict the Submission Workflow. This segmentation allows for clear delineation and management of different stages within the content lifecycle.

- **Visual Representation**: Each workflow type is visually represented within the interface, providing users with a clear and intuitive overview of the various workflows in progress. This segmentation enhances organization and facilitates efficient navigation for users.

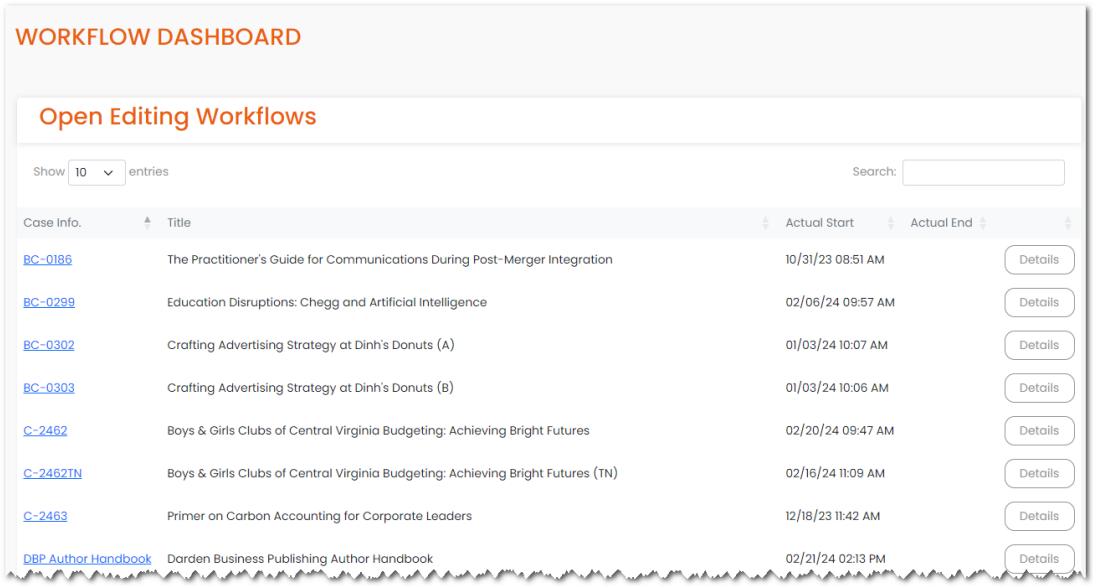


Figure 12: Workflow Dashboards are organized based on workflow types.

Workflow Details at your fingertips

- **Instant Access**: With Case Management, accessing information is effortless - just a single mouse click away. This streamlined accessibility ensures that users can swiftly retrieve the information they need, enhancing productivity and user experience.

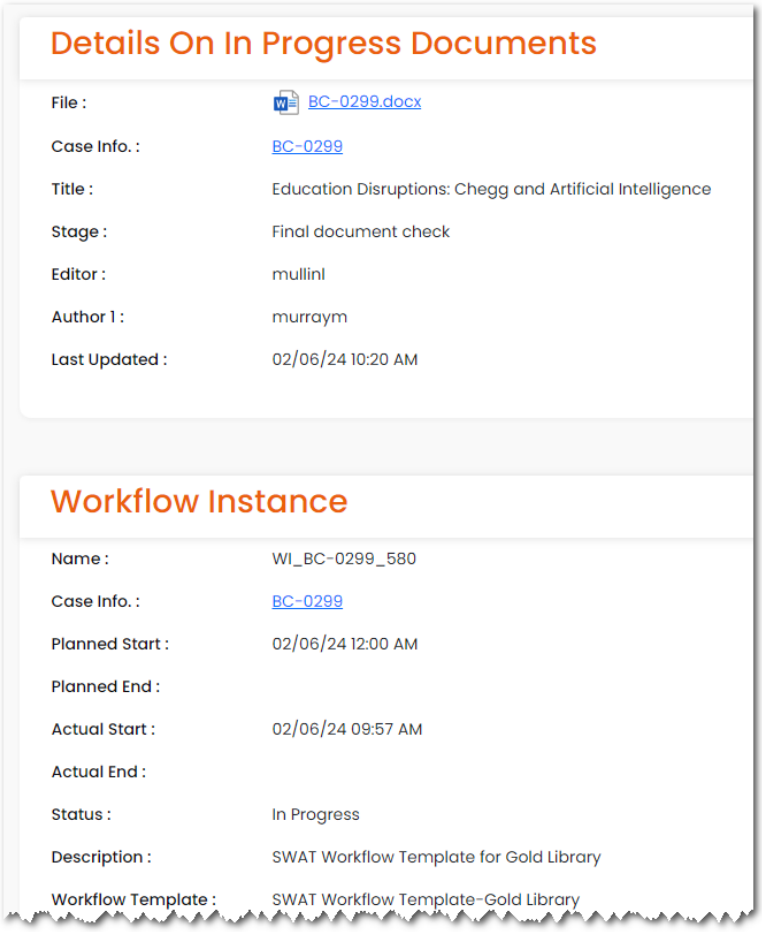
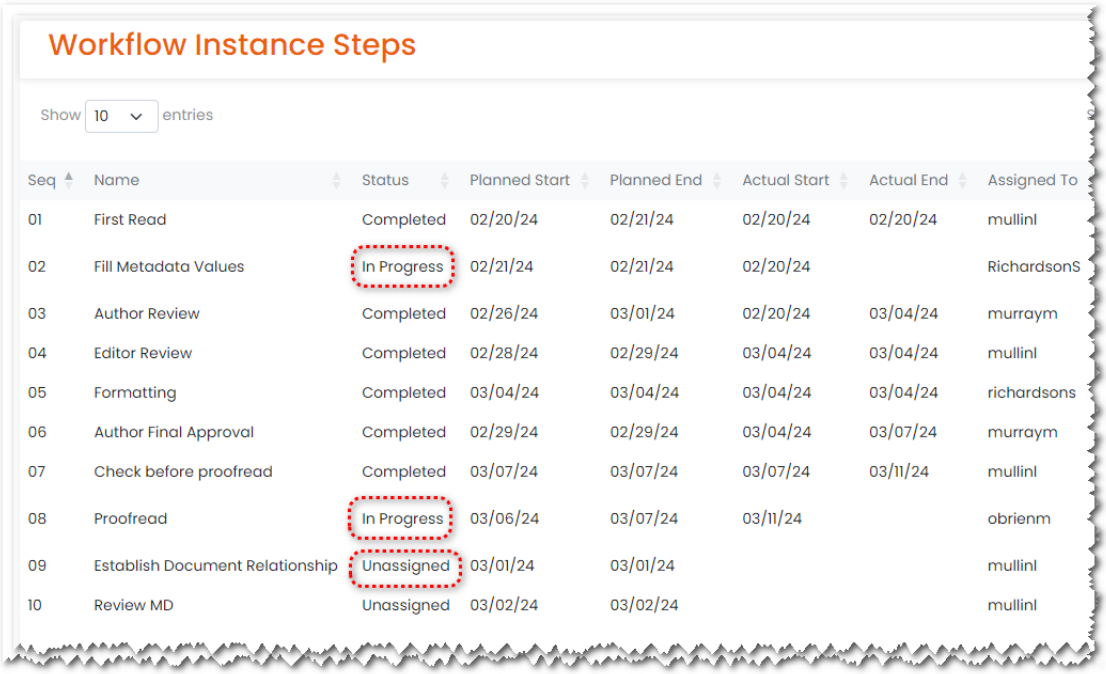


Figure 13: Workflow details at your fingertips.

- **Comprehensive Workflow Visibility**: Case Management provides users with a unified dashboard where they can effortlessly track workflow progress and current status in real-time. Within the same interface, users gain instant insights into workflow steps and their respective statuses, facilitating efficient monitoring and decision-making.

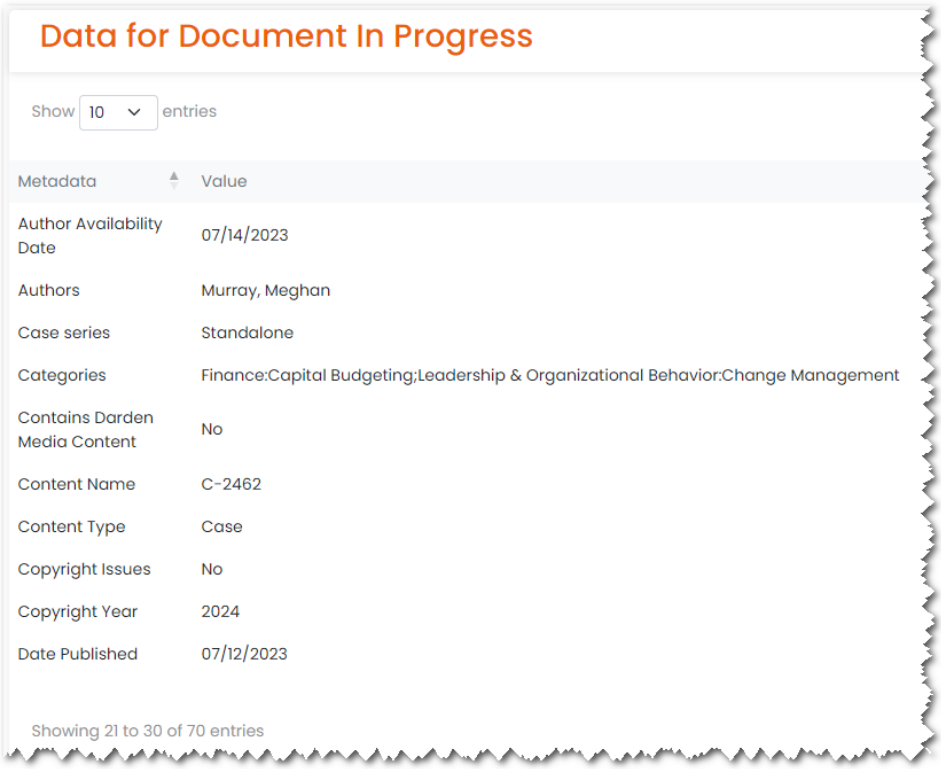


Workflow Instance Steps

Show 10 entries

Seq	Name	Status	Planned Start	Planned End	Actual Start	Actual End	Assigned To
01	First Read	Completed	02/20/24	02/21/24	02/20/24	02/20/24	mullinl
02	Fill Metadata Values	In Progress	02/21/24	02/21/24	02/20/24		RichardsonS
03	Author Review	Completed	02/26/24	03/01/24	02/20/24	03/04/24	murraym
04	Editor Review	Completed	02/28/24	02/29/24	03/04/24	03/04/24	mullinl
05	Formatting	Completed	03/04/24	03/04/24	03/04/24	03/04/24	richardsons
06	Author Final Approval	Completed	02/29/24	02/29/24	03/04/24	03/07/24	murraym
07	Check before proofread	Completed	03/07/24	03/07/24	03/07/24	03/11/24	mullinl
08	Proofread	In Progress	03/06/24	03/07/24	03/11/24		obrienm
09	Establish Document Relationship	Unassigned	03/01/24	03/01/24			mullinl
10	Review MD	Unassigned	03/02/24	03/02/24			mullinl

Figure 14: Workflow Instance Steps are their progress.



Data for Document In Progress

Show 10 entries

Metadata	Value
Author Availability Date	07/14/2023
Authors	Murray, Meghan
Case series	Standalone
Categories	Finance:Capital Budgeting;Leadership & Organizational Behavior:Change Management
Contains Darden Media Content	No
Content Name	C-2462
Content Type	Case
Copyright Issues	No
Copyright Year	2024
Date Published	07/12/2023

Showing 21 to 30 of 70 entries

Figure 15: Metadata associated with the content.

Easy Access to Content Details

- **Role-based Content Access**: Leveraging user permissions, Case Management ensures that authorized users can access content details with a single mouse click. Tailored to individual roles, this streamlined access empowers users to swiftly retrieve pertinent information, optimizing efficiency and productivity

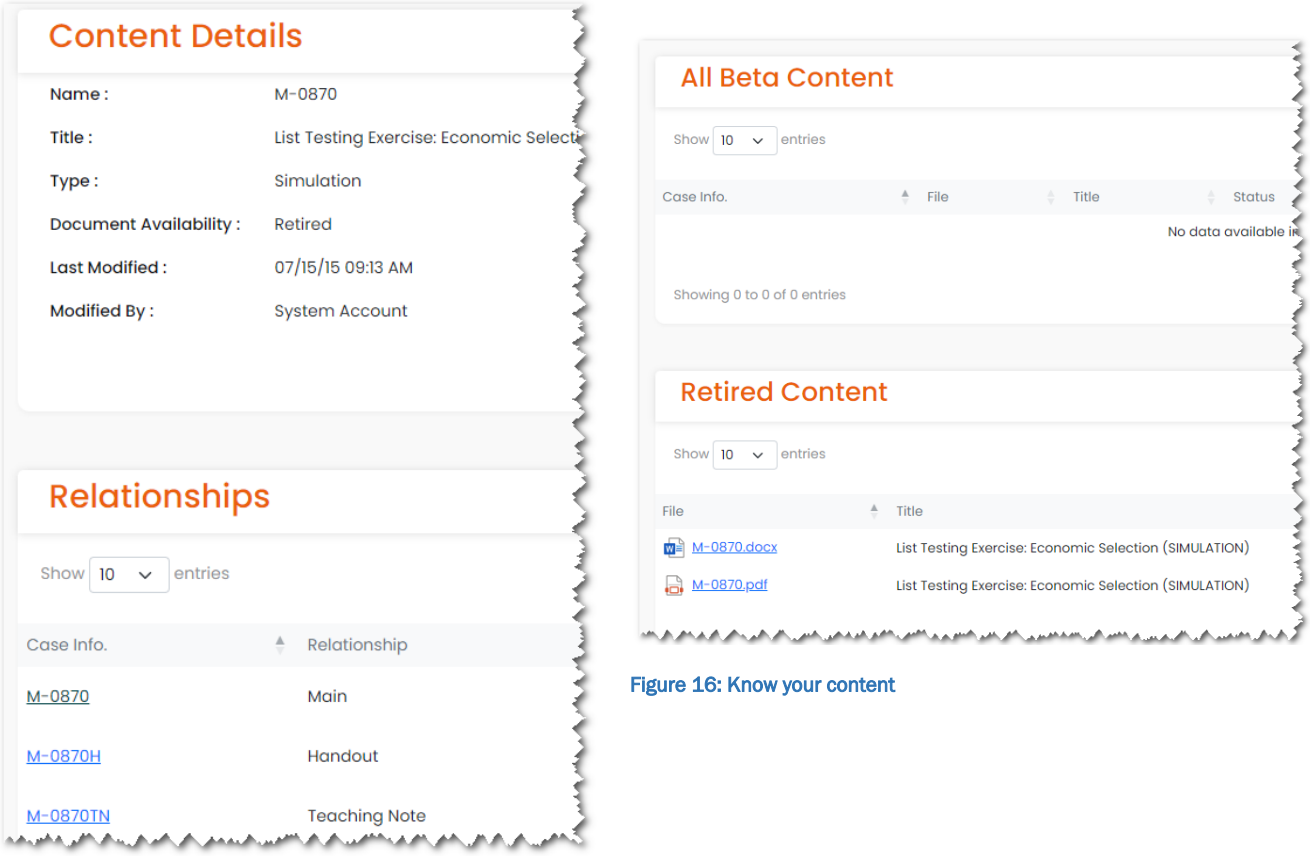
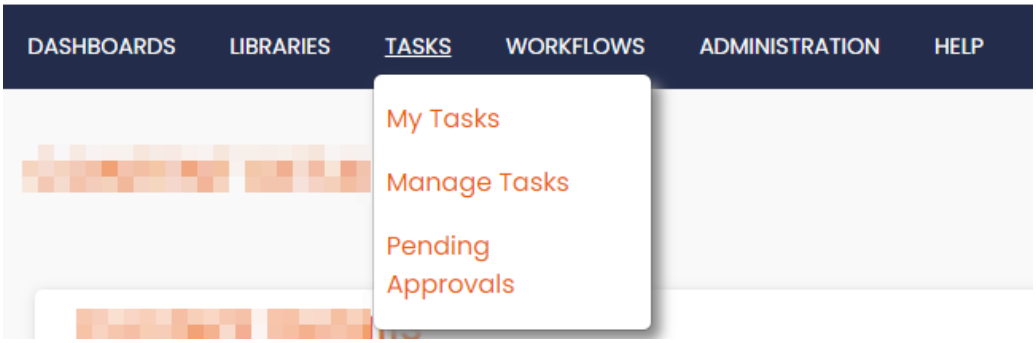


Figure 16: Know your content

Figure 17: Easy Access to Content Details

Easy Navigation

- **Intuitive Navigation**: With Case Management, users can seamlessly navigate through the application using top-level menus and sub-menus. Additionally, hyperlinks and action buttons are strategically placed throughout the interface, enabling users to quickly access the activities they need to perform, ensuring a smooth and efficient user experience.



And More.....

Certainly! The features highlighted here are just a glimpse of what Case Management has to offer.

WHY CASE MANAGEMENT

With Case Management, you're not just investing in a software solution - you're embracing a transformative approach to content management. Our platform offers unparalleled efficiency, flexibility, and control, empowering your teams to achieve more in less time.

From streamlined workflow automation to intuitive navigation and robust search capabilities, Case Management equips your organization with the tools needed to thrive in today's fast-paced digital landscape. Say goodbye to manual inefficiencies and hello to a future where content management is effortless and productive.

Don't settle for mediocrity - choose Case Management and unlock the full potential of your content management processes. Schedule a demo today and discover why leading organizations trust us to drive their success.

A Strategic Investment for Future Success!

When you invest in Case Management, you're not just spending money - you're strategically positioning your organization for future success. Deploying our solution to automate editing, conversion, and distribution processes is a wise investment that pays dividends in productivity and efficiency.



By automating redundant activities, Case Management liberates your team members from mundane tasks, allowing them to focus their talents on strategic initiatives that drive growth and innovation. Furthermore, our solution minimizes paperwork expenses and reduces overhead costs associated with maintenance and overhauling.

In essence, investing in Case Management is more than just a financial decision - it's a strategic move toward optimizing your operations, maximizing productivity, and propelling your organization toward long-term success. Join the ranks of forward-thinking businesses and schedule a demo today to experience the transformative power of Case Management.

Improve Time-To-Market

With our Case Management solution, say goodbye to the drudgery of day-to-day recurring activities. Our platform empowers your organization by automating these tasks, saving you valuable time and effort.

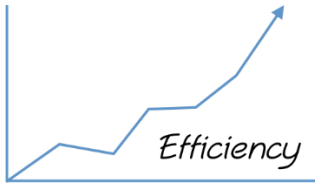


Introducing Case Management revolutionizes your workflow, enabling faster processing of voluminous tasks and significantly reducing turnaround times. Imagine your cases being effortlessly converted and distributed within minutes, thanks to the power of automation.

Don't let manual tasks slow you down - embrace the efficiency and speed of Case Management. Experience the difference today and elevate your organization to new heights of productivity and success.

Enhanced Workflow Efficiencies

Our Case Management solution is more than just a tool - it's a catalyst for reducing enterprise costs and streamlining operational activities. By automating repetitive and time-consuming tasks, our platform empowers your workforce to focus on strategic initiatives and revenue-generating activities.



With automation at the helm, Case Management ensures improved workflow efficiencies, enabling your organization to achieve more with less effort. By freeing up valuable time and resources, your enterprise can allocate resources where they matter most, driving productivity and, ultimately, success.

Don't let manual processes hold your organization back - invest in Case Management and unlock the full potential of your enterprise.

Accurate and Consistent Operations

Manual processing comes with inherent risks of errors, particularly when dealing with large volumes of work. Human error and inconsistency can lead to missed steps and inaccuracies, compromising the quality of output.



With our Case Management solution, you can bid farewell to these concerns. By automating processes and adhering to standardized operating procedures, our platform eliminates the possibility of errors and ensures consistent execution of tasks.

Experience peace of mind knowing that your operations are conducted with precision and reliability. Invest in Case Management and elevate your organization to new heights of accuracy and efficiency.

Reduced Employee Turnover

While there's a common myth that automation leads to increased employee turnover, the reality is quite the opposite. Many enterprises have found that automation actually reduces turnover rates.



Executing repetitive tasks day in and day out can quickly lead to employee burnout and dissatisfaction. Our Case Management solution addresses this issue by automating mundane tasks, freeing up employees to focus on more challenging and rewarding activities.

By empowering employees with engaging tasks, our platform boosts morale and enhances job satisfaction. Satisfied employees are more likely to perform at their best and remain loyal to the organization, leading to decreased turnover rates and a more stable workforce.

NEXT STEPS

We'd be delighted to provide you with a comprehensive demo where you can experience firsthand the full range of capabilities our platform provides. From seamless workflow management to powerful search functionalities and intuitive navigation, we're confident that you'll be impressed by what Case Management has to offer.

Let's schedule a demo at your earliest convenience to explore how our platform can address your specific needs and empower your team for success.