

AXI [CASE MANAGEMENT]

Case Management solution for government agencies & service oriented organisations



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AXI CASE MANAGEMENT OVERVIEW

This innovative AXI software solution helps government agencies and service oriented organisations to improve their operations ; reducing case backlogs, setting up secure procedures; sharing knowledge in a secure way an reducing the administrative costs.

THE BUILDING BLOCKS

AXI Case Management cost-effectively manages the entire case life cycle. The solution therefore comprises workflow management and document management, calendar, e-mail and telephone integration.

FOCUS ON IMPROVEMENT AND FLEXIBILITY

- AXI Case Management makes it possible to fundamentally and fully improve the administrative processes
- given that operational processes are subject to change, AXI Case Management offers the authorized user the necessary tools to organize the case processes in a flexible manner
- special attention is being paid to optimizing the coordination of the entire administrative process
- the solution offers wide-ranging possibilities, up to Total Quality Control and performance management.

A UNIQUE WORKFLOW CONCEPT AS THE FOUNDATION

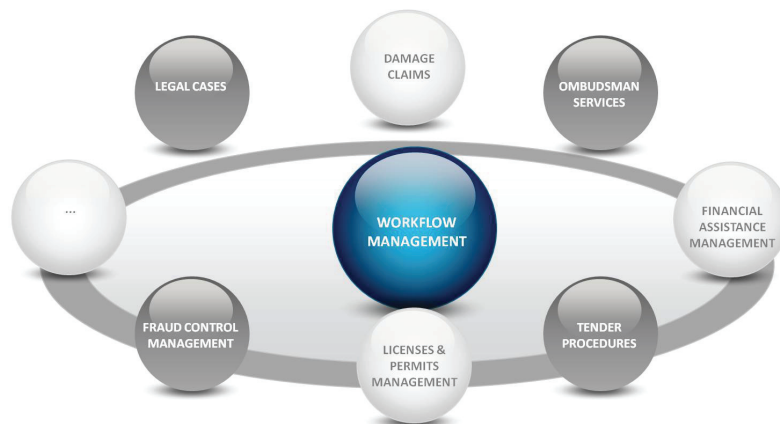
- In order to make the administrative processes more efficient, AXI Case Management has combined the advantages of workflow management and document management into one solution
- AXI Case Management starts with defining a workflow of tasks, which can be linked to any type of case (complaint, subsidy, legal cases, tender procedures, etc.)

- documents are directly linked to the steps in the processes: the solution can link both incoming documents to the workflow as well as generate outbound documents on the basis of case data; in accordance with predefined templates
- the workflows can be executed manually and/or supported by an electronic workflow
- the authorized user can translate any amendments in legislation/regulations and processes into efficient workflows, without any need for programming.

CASE TYPES

With the assistance of AXI Case Management, the following workflows can be implemented, for example:

- legal cases
- internal legal advice
- damage claims
- incident management
- ombudsman services
- internal complaints management
- financial assistance management
- tender procedures; integrated with purchase order software solutions (AXI Purchase Order Management ...)
- licenses & permits management
- inspection activities
- fraud control management
- risk management ...



AXI Case Management – file type overview

FLEXIBLE ORGANIZATION ACCORDING TO CASE TYPE

Various case dependent data can be set up dynamically per case type (complaints, legal, tenders, etc.) by making use of flexible fields, so-called 'flexfields'.

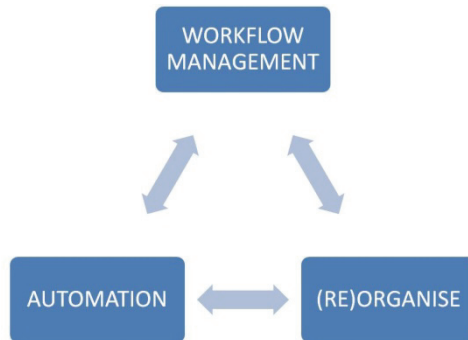
WORKLOAD OVERVIEW

- Performance management and auditing are part of AXI Case Management. Its built-in measuring points ensure fast insight into the workload, the capacity and the case processing time.
- In order to prevent bottlenecks, the solution offers the possibility to quickly respond to changing resource capacities.
- By integrating escalation pathways into the workflow, it is possible to stay in control before anything gets out of hand.

OPTIMIZING OPERATIONAL PROCESSES

- In view of the fact that integral process management contributes to the continuous improvement of operational processes, AXI Case Management also generates all the necessary Total Quality Control reports.
- Based upon the conclusions of these reports, the processes can immediately be reorganized - step by step. Thus, tasks can be removed,

combined, expanded or divided...



The system also allows the temporary insertion of sub-processes in order to comply with exceptions in law and regulations.

FOCUS ON THE USER

- AXI Case Management is the user guide. The workflow can be influenced by the authorized users. In other words, there is now no longer any need to affect the autonomy of the various departments.
- Users can work independently on the basis of a performance commitment. Without being timed, from their home office ...

ATTENTION TO INTERNAL CONTROL

- Reporting, strong authorization rules, strict security, effective management of the procedures and workflow management offer solid guarantees.

INTEGRATION IS SELF EVIDENT

- The predefined processes in AXI Case Management allow for bidirectional integration with existing financial processes.
- Workflows can trigger actions in other applications.

THE SOLUTION BREATHES JAVA AND OPEN STANDARDS

AXI Case Management is based on open standards, the Oracle Application Development Framework 11G, Java and open source software (e.g. Open Office), XML data exchange ...

For document storage and management, AXI Case Management contains a user-friendly content management solution.

The customer organization can opt to make use of any available document management solution, such as Alfresco, MS SharePoint, Documentum, Oracle Universal Content Manager ...

AXI CASE MANAGEMENT – FUNDAMENTAL CHARACTERISTICS

AXI Case Management is dynamically configurable with regard to: workflows, processors, roles, case types, contacts.

WORKFLOW AS CORE APPLICATION

The user can define different workflows per case type:

- a workflow is composed of different steps
- each step of the workflow can be associated with one or more roles (e.g. inspector, processing official); on this basis, processors can be linked or automatically selected
- on or more documents can be associated with a step; these documents are then completed during the process
- for outgoing documents, templates can be specified
- it is possible to indicate whether a workflow should be carried out electronically or manually
- for an electronic workflow, the task list for the processors is automatically updated
- it is possible to plan when automatic e-mails should be created and sent: e.g. to a processor when a step in the workflow is completed by different processors; when a given task is not completed within the expected amount of time, etc ...
- per processor - and potentially per step - time limits can be set; a substitute can be defined; days of absence can be recorded ...
- when a new procedure is opened, a workflow can be fully or partially inherited; which means that the time limits within which the processors need to complete the different steps immediately begin running
- from a workflow, documents can be sent to a contact, a group of contacts or a specific selection.

Convenient use of document templates and document management

- all possible templates for outgoing documents can be created by the authorised users (based on OpenOffice, for example)
- documents are created in workflows - based on the templates - with certain data from the case in question

- documents can be generated automatically from a workflow step or manually by a user based on templates
- manually and automatically created documents are linked to a case
- all documents are stored centrally in the linked document management system
- in function of the search for documents, indexes (meta-data) can be specified that are linked to the indexes in the document management system
- documents can be searched for across all cases; the associated case information can subsequently be called up
- AXI Case Management can be integrated with various OCR solutions.

FAST CREATION OF NEW CASES

- users can manually create a new case of a certain type (e.g. complaint)
- cases can also be created automatically from an external application or functionality; e.g. a complaint via a web portal or a scanned complaint via the associated OCR solution
- after a case is created, a workflow can be linked automatically and filled in using the basic information; the user can still add steps and documents to this.

EFFICIENT PROCESSING OF CASES

- when an electronic workflow is used, at startup, an e-mail or an RSS feed can be sent to different processors; this can be done at the time that they need to carry out a certain task
- via the e-mail message or an RSS reader, the processor can click through to his general task list/to-do list: with an overview of the recent tasks and all ongoing matters
- from the creation of a case, the workflow can also be started manually, e.g., if the user is finished creating it
- it is possible to set parameters for the assignment of processors per step: e.g., depending on the type of case; by multiple persons or not; in a given sequence
...
- per user in an active workflow step, the task list is updated
- depending on the task or the application, the user can close a task manually or this can happen automatically.

EMBEDDED BUSINESS INTELLIGENCE

- Business intelligence functionality is an integral part of the application
- the focus here is on performance management, auditing and Total Quality Control
- the control is done via dashboards, key performance indicators, drill down facilities... with attention to integration with the familiar spreadsheet environment.

MAKING IT EASY FOR THE USER

AXI Case Management users receive their own welcome page with an overview of the most frequently used applications, task lists, internal messages ...

Other advantages are:

- option on each screen to switch between, for example, Dutch and French
- intuitive screen construction
- use of one's own choice of style ('skin')
- menu with collapse/expand button
- use of the 'Home' button
- visualisation of up-to-date task lists
- integration with mail
- integration with office
- automatic messages at login
- telephone integration
- online help functionality
- strict security for access rights
- possibility to use an eID
- single sign-on.

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Numerous realizations in service oriented and public organizations have led to the functional wealth of this benchmarking solution : AXI Case Management

These solutions can also be found in the AXI portfolio : Finance (Accounting), Purchase Order Management and Invoice Management