



 WORKPOINT



# Case Management

## Intelligent solution for managing cross-organisational cases by providing e-mail and document management in SharePoint Online and Office 365

Our solution supports efficient case management with document and email management across the organization. The result is a high and uniform quality in all ongoing cases, which facilitates the processes for routine tasks and helps in ensuring compliance with fixed procedures such as the GDPR.

The solution provides a common and simple user interface, which will guide caseworkers through the entire case progress. By giving employees a complete overview of all cases and their individual stages, documentation, e-mails and data, it becomes much easier to do progress reports on cases and to find and retrieve accurate knowledge and information.

Case  
Management  
- very simple  
and efficient

## Work with complex cases directly from Office 365

With a WorkPoint Express plugin, you are ensured a quick and full integration for Office 365. This provides employees with the unique opportunity to work with complex and cross-organisational cases directly from their everyday programs such as outlook, word, excel, powerpoint

and many more. That way, you are gathering all your knowledge, information and important documents on a platform, which provides employees with a extremely recognisable interface and a comfortable working environment.

## Key features of Case Management

### ▶ Gathers all information in single case portal

All correspondence related to cases, documents, emails, information and data are gathered in a unique search portal for quick search and retrieval of documents.

### ▶ Monitor the entire case process

With intuitive stage management, The solution allows organisations to guide case workers through cases and provides a complete overview of ongoing cases.

### ▶ Well-organised template library

Ensure the quality and systemisation of cases by using the template library, and provide case workers with guidance and structure for easier case work.



Achieve a single overview of all cases in the organisation. Customers, stakeholders, information, master data and documents can automatically be affiliated to the individual case



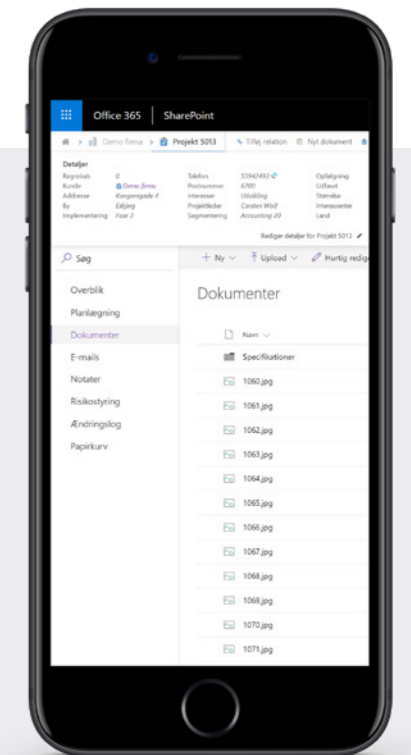
Automatic version management of documents ensures all changes and approvals are always registered



Efficient management of email with quick and easy filing to the case by drag and drop. Find or retrieve all information and history of a case quickly and easily



Well-organised library with templates making it easy to create new case documents.





## Support tools and functions with **Case Management**

A selection of tools and functions that can be included in your case management solution to ensure the overview and handling of all ongoing cases

### User-friendly platform

Simple platform with an intuitive and user-friendly interface that allows the user to easily navigate in the system and start managing and handling case. This saves your organisation a lot of resources in time and manpower, since users will only need a brief introduction as training.

### Stage management

Stage Management for supporting processes of the individual case progress with the opportunity for guidance and instructions for each stage.

### Overview of all information

Gather all knowledge and information in one platform and have a complete overview of all documents, e-mails, stakeholders, metadata on specific cases.

### Automatic version management

Control and ensure that all changes and corrections in cases are always automatically registered and logged within the WorkPoint system.

### Integration for Office 365

Perform case management and manage case tasks in your office platform. By using WorkPoint Express, you can easily integrate the case management solution in programs such as Outlook, Word, Excel and PowerPoint, and start managing case processes directly in Office 365.

### E-mail management with drag and drop

Efficient e-mail management with journalisation directly from Outlook with drag and drop functions, which makes it far easier to file and archive mails and documents.

### Template library

The system provides efficient template management, which means that in WorkPoint you can find any case template you need. There are templates for meeting reports, status reports, offer documents, framework agreements and the like.

### Automatic metatagging

Automatic and intelligent metatagging that saves users time and resources as well as quality assuring metadata on emails and documents. This intelligent Metatagging can be implemented on all case tasks, documents and cases to gather all correspondence across the organisation.

### Intuitive search function

Advanced search function made simple. WorkPoint provides a easy and intuitive search function, that helps your organisation in quickly finding and retrieving information, data and documents of employees. Ensures an efficient communication process and gathers all case relevant correspondence in one place.

### Professional dashboard

A professional dashboard in SharePoint Online that allows you to easily systemise all cross-organisational cases. Get a quick and simple overview of tasks, issues and progress on your own customised case management dashboard.

### Task management

Task Management allows the opportunity for creating specific tasks regarding to the progress of individual cases which provides a very strong insight in to all cases.

**Get in touch**

Would you like to know more about WorkPoint, we urge you to contact us or one of our partners.

Please view our partner list at:  
[www.workpoint.dk](http://www.workpoint.dk) / [www.workpoint365.com](http://www.workpoint365.com)