

everteam

everteam.case

Product Catalog

Legends






Key	Definition
ET	Everteam
EG	EVER GROUP
ECM	Enterprise Content Management
	Information
	Note
	Warning
	Critical Information
	Action

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1. everteam.case

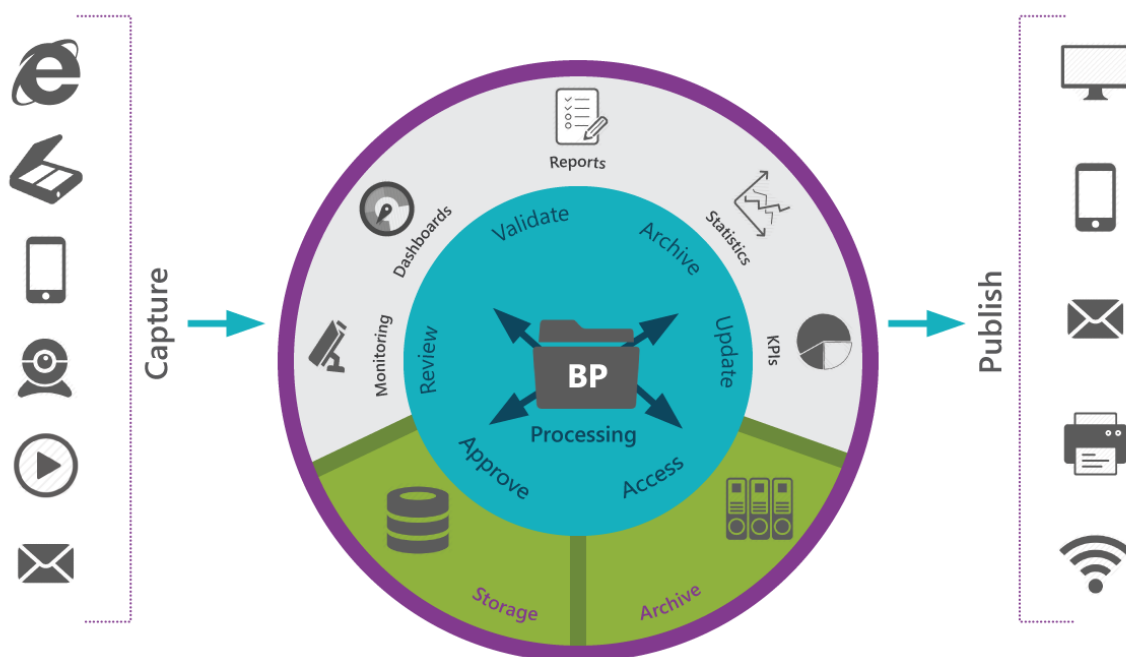
1.1. Introduction

Everteam offers a standard, scalable, open, and full-featured, solution for the automation of enterprise document-based processes: everteam.case.

everteam.case is the tool of choice to enhance business performance, reduce cycle time and improve productivity.

everteam.case offers standard functions such as:

- Managing the processing of applications.
- Circulating applications from one actor to another via baskets.
- Ensuring traceability of actions performed on the applications.
- Managing the activities and distributing the load when necessary.
- Managing alerts in case of overload.



everteam.case is based on a string of elementary requirements: connect the requester, coordinate the tasks to be done and authorize a final action.

This is a clearly identified, structured process which coordinates the interests of a "customer" with those of the enterprise or organization concerned. The request fulfillment solution transmits the request expressed by the customer directly to the department concerned via a workflow so that the question can be resolved efficiently.

The everteam.case solution is an everteam workflow solution which offers the following features as standard:

- Process requests,
- Circulate a participant's requests to someone else using baskets, while controlling actions,
- Track actions and time spent on them,
- Monitor activity and redistribute the workload if necessary,
- Handle alerts in case of overload,
- Put requests on hold,
- Merge requests.

The solution covers:

- Setting up request fulfillment processes for documents from different sources,
- Defining the participants and roles who will be involved in the different request handling processes,
- Defining process baskets enabling participants to work on content assigned to them.

And also:

- Monitoring workloads, with alert mechanisms in case of overload
- Redistributing the workload, in order to handle seasonal variations or to reorganize overloaded distribution circuits
- Monitoring processing times, with alerts if allocated deadlines are not met.

In this way, the everteam.case solution allows you to create, update, search, view and process requests with their associated documents.

It is based on several everteam services:

- Requests and document types
- Profiles
- Workflow
- Task baskets
- Activity statistics
- Folders (for reorganizing folders).

This chapter contains the following sections:

1. Basic concepts
2. Basics
3. Overview

1.2. Basic concepts

1.3. Request

A request consists of a coherent set of documents. The idea is generic, for example:

A piece of correspondence requiring action (information request, change of address, claim, recruitment interview, etc.),

A document to be managed by one or more participants (supplier invoice, customer order, etc.),

An administrative form with its own procedure (compensation request, etc.),

A file requiring validation (credit request, grant request, company registration, etc.).

1.3.1. Document

A document always corresponds to an everteam record (metadata) and an attached file (various formats).

1.3.2. Document Type

Each type of document is associated with a view of the document table, possibly with a profile, and with a workflow process.

1.3.3. Task Basket

A virtual basket for the workflow is the equivalent of an in-tray on a desk. It contains the files to be processed along with all the necessary data. From this basket, the participant can open the task they received, consult processing instructions and related information, execute the requested task and declare it complete. The underlying workflow engine will then pass the file (referred to as a workflow instance) to the next participant indicated in the process definition.

1.3.4. Process

Several processes can be carried out on a request:

Pause a request which is being processed,

Merge requests,

Reorganize a request's documents, including digitized ones.

1.4. Basics

The user submits their request using a form on the web. The request is then to the different participants in the enterprise for processing in accordance with a lifecycle defined in a workflow. `everteam.case` handles:

- Display of a request's progress in the associated process diagram,
- Entry of notes on requests. Notes are either confidential or accessible, depending on role.
- Automatic filing of the documents associated with a request in configurable filing plans,
- Access to process baskets from an EDM interface,
- PDF export of search results with all documents, with or without the associated descriptive records.

The administrator defines in `everteam.case` all the types of document which may be received in order to generate all associated processes and automatic filing for these documents.

`everteam.case` handles:

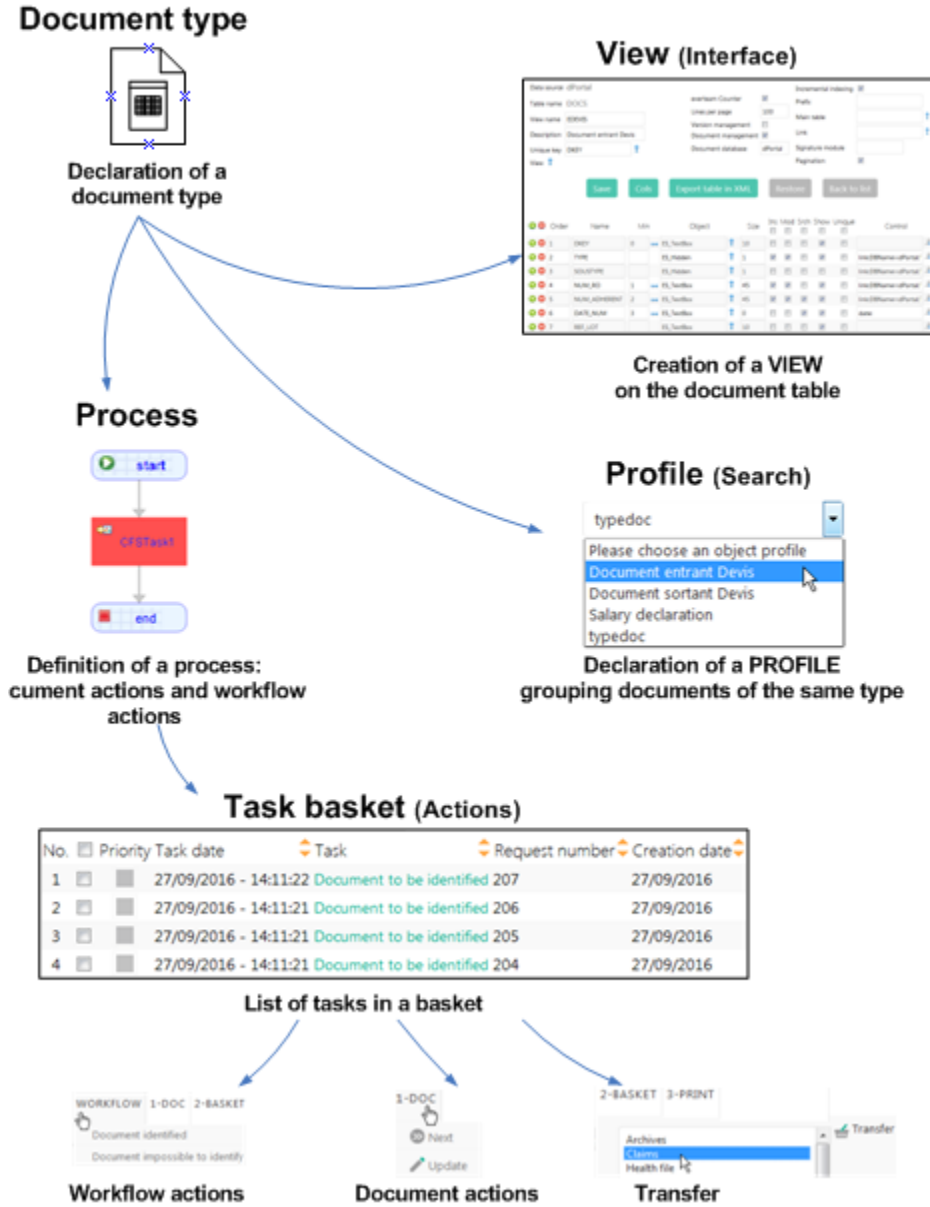
- Indexing the contents of items attached to the descriptive records of a request's documents
- Lemmatized search in descriptive records, attachments and notes made on requests or documents
- Synchronizing a search result with a filing plan.

And also:

- Tracking operations carried out by the participants during the whole lifecycle of an instance of a process on a request: EDM access to documents, print requests, addition of notes, etc.






- Giving access to the processing logs of a request from one of its documents, so that front office participants can see how current processes are going.

Objects associated with a Document type



1.5. Overview

The `everteam.case` solution interface is accessed via the menus on the left of the `everteam.case` home page: These menus are:

-  [Task list]: access the list of tasks to do, in order to process them
-  [EDM]: manage attached documents
-  [Configuration]: Monitor processes and statistics, Workflow Designer, import requests, Wizard.
-  [Parameters]: basket management, rights on baskets, basket monitoring, parameters, profiles, roles, deployment.
-  [Organize contents]: divide up folders (feature of the `et.fld` Folder management service: please refer to the guide).

1.6. Key Benefits

`everteam.case` presents many benefits:

- Flexibility: `everteam.case` adapts to the organization needs and its evolution.
- A wizard driven interface allowing administrators to easily setup, test and deploy complex workflows.
- Short implementation time.
- Increased productivity.
- Immediate cost savings.
- ROI in less than 1 year.
- Complete overview of the operations through advanced reports.
- Powerful monitoring features allowing:
 - Managers to optimize and reallocate workload.
 - Executives to be notified of KPI.

1.7. The Business Model

everteam.case users follow a simple methodology to create and develop a case:



Figure 1 : everteam.case Business Model

- Process analysis: Comprises of studying the business needs and gathering the process information, tasks and r
- les along with the related security scheme.
- Process modeling: Comprises of drawing the processes using the system's intuitive designer.
- Security context definition: Comprises of drawing the organization structure that will be involved in the case automation.
- The designed organization structure contains different levels and roles which will be assigned with security constraints in respect to business needs.
- Case definition: Comprises of:
 - Defining:
 - The forms involved in the workflow
 - Users' baskets
 - Case document libraries
 - Associating content types to the processes
- Process automation: Comprises of putting the designed case model into production
- Delivery: several actions may be taken on a given case, users may:
 - Search cases using a selection of search types (Advanced search, content search, and content type search).
 - View reports on the case activity.

Advanced Search	
Reference Number	Reference Number
Category	Category >
Transfer From	Transfer From >
Transfer To	Transfer To >
From Transfer Date	From Transfer Date
To Transfer Date	To Transfer Date
Sender	Sender >
Recipient	Recipient >
Subject	Subject
Purpose	Purpose >

Search

Reset

Figure 2: evertime.case Search Engine

1.8. Application Features

evertime.case provides a full-fledged solution to create, model and automate a case. Below are the solution tools and features:

1.8.1. An Intuitive Business Modeler

evertime.case allows case modeling through a state-of-the-art business modeler which is a graphical application, dedicated to business users. The business modeler provides an intuitive interface for the modeling of corporate processes without requiring any particular technical know-how.

evertime.case business modeler provides features to draw business processes as sub-processes to a main Process. Each Process is then completed with activities and transitions.

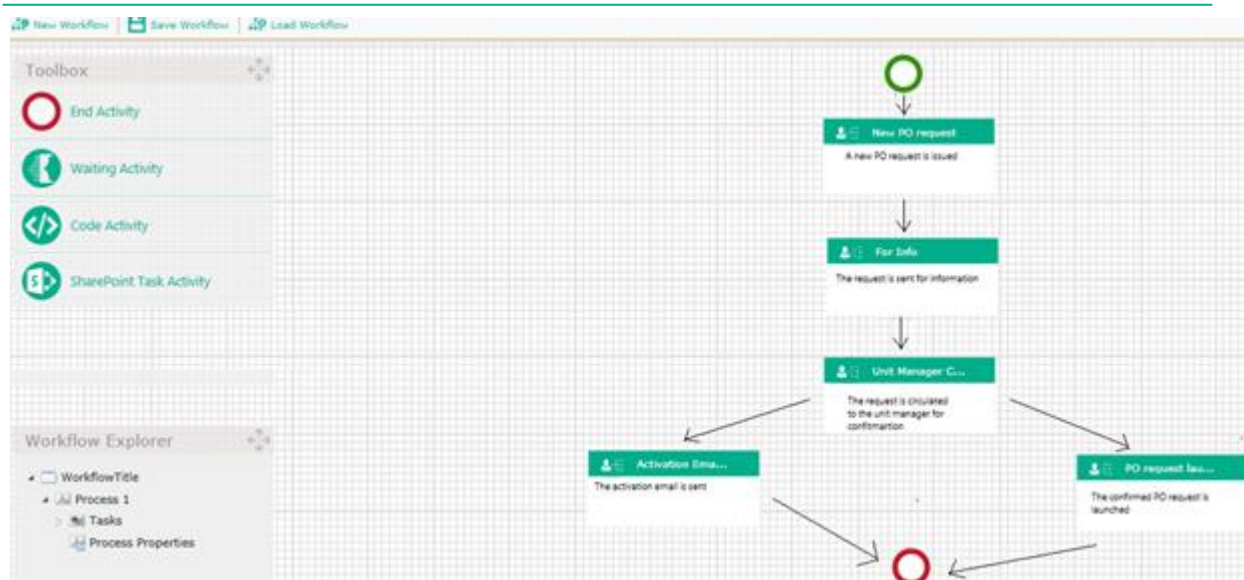


Figure 3: everteam.case Business Modeler

Moreover, everteam.case business modeler provides an intuitive form to fill the attribute of each activity: name, description, conditions before an activity is satisfied, duration of an activity, constraints...

1.8.2. Business Modeler Activities

Everteam solutions business modeler offers users a wide array of activities to build a case. The activities are user friendly and can be selected and positioned by easy drag and drop.

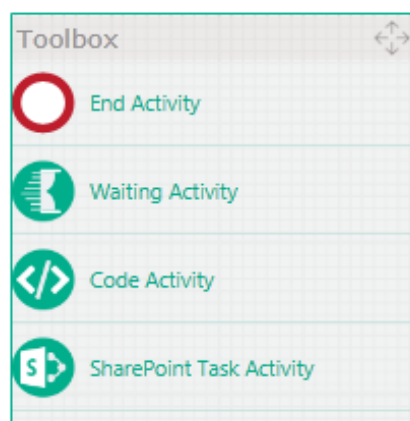


Figure 4: everteam.case Activities

- End Activity: indicates the activity/process point of end.
- Waiting Activity: stops the execution of a path until a certain date
- Code Activity: executes custom .Net code in a precompiled library
- SharePoint Task Activity: creates a SharePoint task and assigns it to a user
- Send Mail Activity: sends an email to a user.

1.8.3. Task Activity

everteam.case allows the definition of process tasks. A process task is assigned to a user whenever the associated process rules are triggered.

1.8.4. Decision Activity

everteam.case allows the definition of rules on tasks to be executed according to the conceived workflow execution logic.

1.8.5. Email Activity

everteam.case allows users to configure the process to send an email to notify or brief selected workflow contributors on a certain point of the workflow execution.

1.9. Business Modeler Benefits

everteam.case business modeler benefits are:

- Providing User-friendly interface to define business processes.
- Disseminating work by defining different activities.
- Providing convenient editing and deletion of business processes.

1.9.1. Advanced Case Tracker

everteam.case "Case Tracker" offers end-users to ability to view the flowchart of a currently executed workflow instance.

When executed, end-users can track the workflow progress from initiation to termination and locate the highlighted activity currently executed.

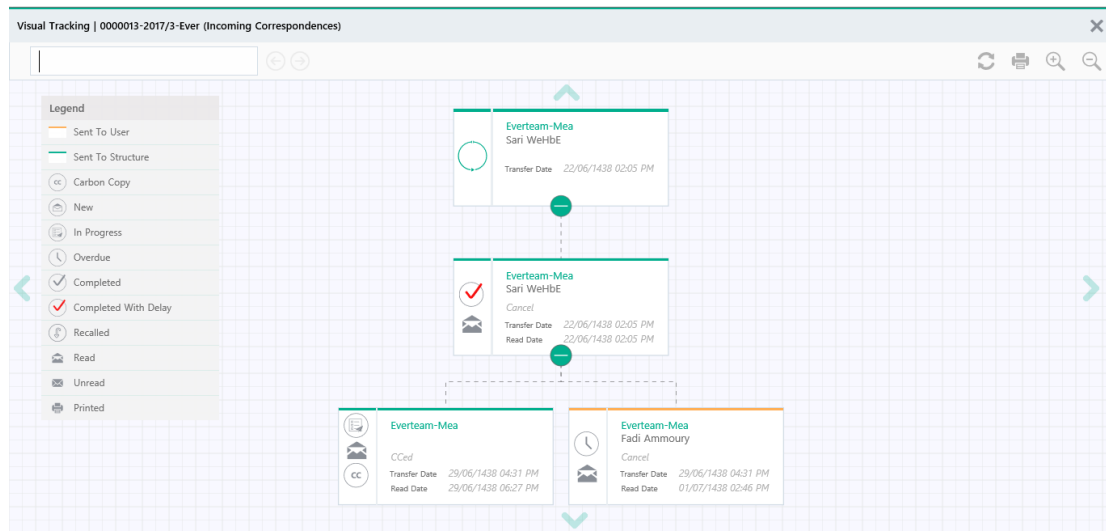


Figure 5: Case Tracker

1.9.2. Personalized Task Management

everteam.case allows offers the management and organization of user tasks through 'my baskets' feature.

This inbox-like feature allows users to have through dynamic listing, a detailed view of their assigned tasks with their attributes, categorized by their content type.

The 'Inboxes' interface shows a list of tasks. The top bar is green with a back arrow and a search icon. Below the bar, there are four action buttons: 'More' (grey), 'Info' (blue), 'Transfer' (red), and 'Reply' (orange). The task list includes details for two items:

	Subject	claim registration
	Sender	Bank of Beirut
	Ref	2018-0000017-Incoming
	From	Claim Registration, Antoine EL-MURR(Sales Manager)
	Date	11/01/2018 12:19 PM
	Due Date	21/01/2018 10:00 PM
	Subject	test
	Sender	Bank of Beirut
	Ref	2018-0000015-Incoming
	From	Claim Registration, Antoine EL-MURR(Sales Manager)

At the bottom, there are four categories: 'Incoming' (green), 'Outgoing' (grey), 'Internal' (grey), and 'Internal Broadcast' (grey).

Figure 6: User Basket

1.10. History

everteam.case allows users to view the history of a selected instance (Actions executed on the instance, Date, user...).

In addition, users can view all the started instances of the selected case.

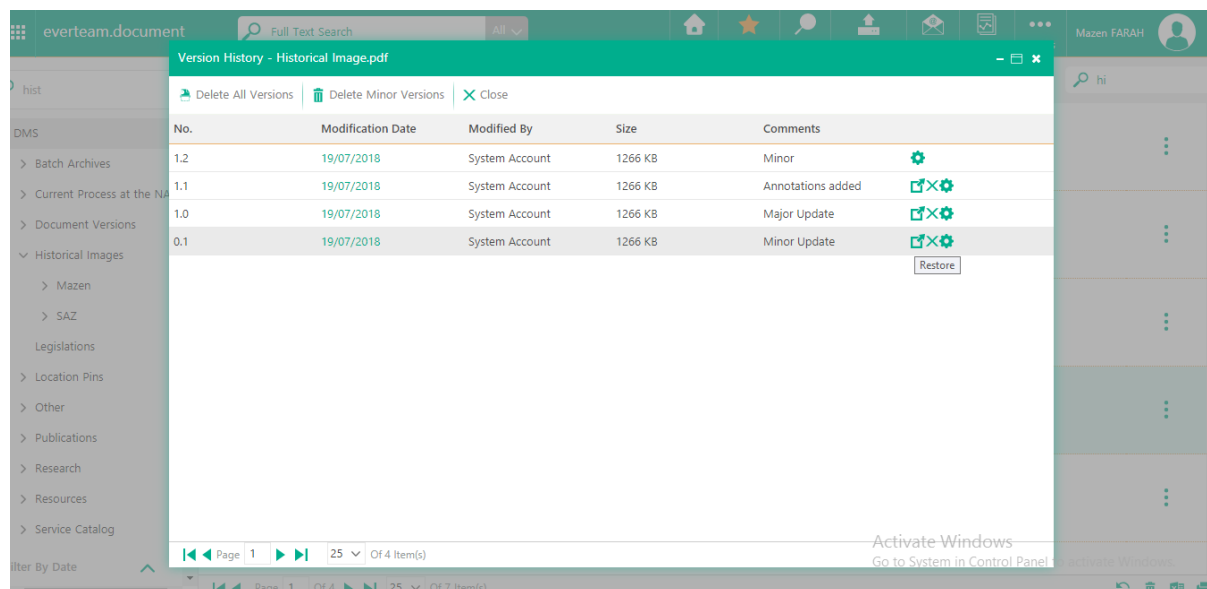


Figure 7: History

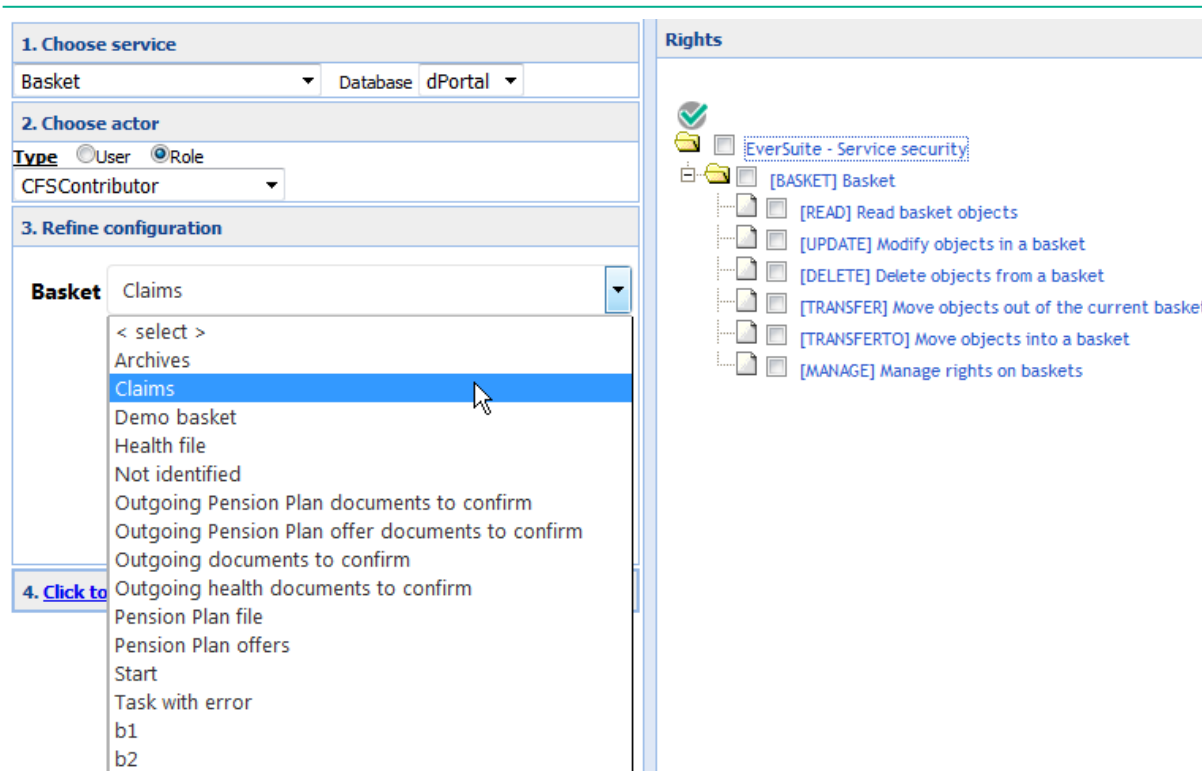
1.11. Multiple Languages Support

everteam.case is multi-lingual supporting many languages comprising Arabic and English using the same binary. everteam.case supports Arabic, on the content, container, and search and indexing engine levels. Everteam solutions Interface provides its users an easy way to switch between languages.

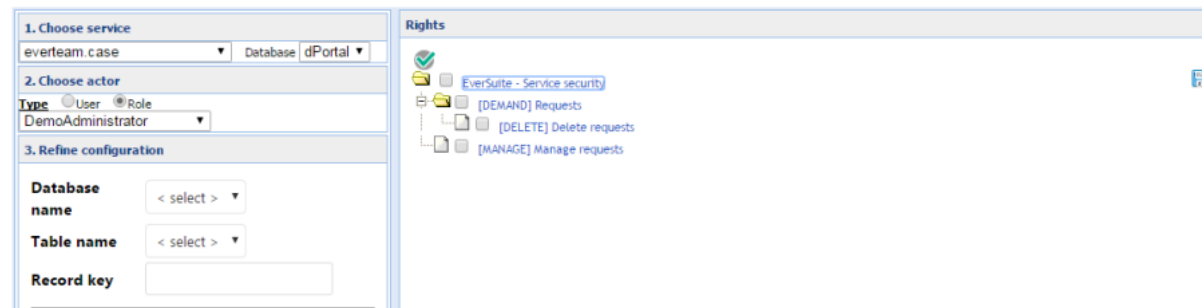
1.12. Security

Security for the everteam.case solution is managed via the associated service and Baskets

Basket Rights allows you to manage security on task baskets, in the same way as for the other baskets (standard interface). The Baskets service is selected by default. Rights are assigned for a selected basket via the 3. Refine configuration heading.



Rights on requests: everteam.case menu allows you to manage authorizations, in particular for the application manager. Rights are assigned across the whole service (no refinement possible).



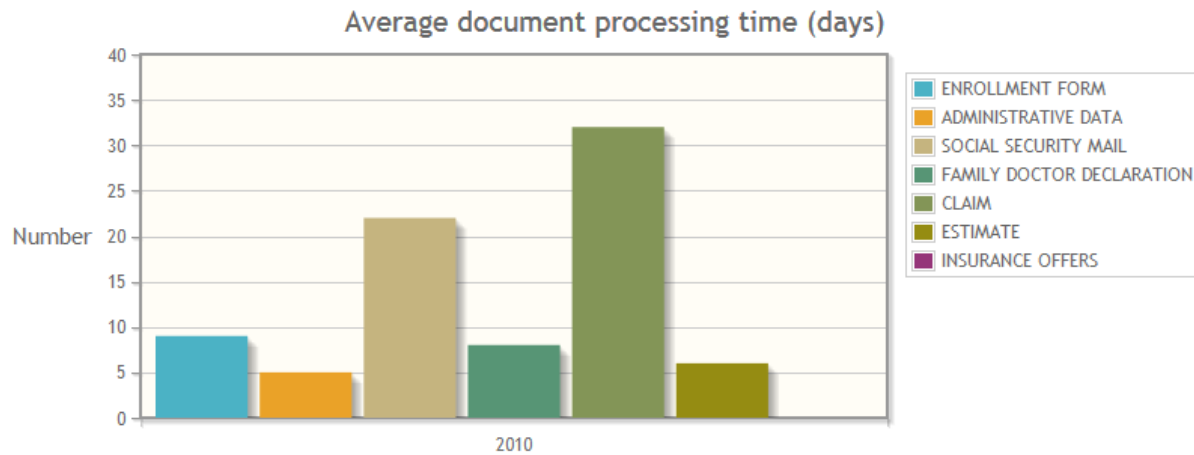
1.13. Monitoring and Statistics

The everteam.case > Configuration menu contains several options for configuring and displaying statistics:

1. Monitor
2. Monitor statistics
3. Monitor processing

1.13.1. Monitor

This menu lists definitions of sets of statistics, which you can add to, modify or run.



1.13.2. Monitor Statistics

everteam.case

Monitor	Message	Recipient	Events	First	Last	Count
Monitor Statistics	1 Health file under 12: 7			20170303 11:39:06	20170303 11:39:06	1
Monitor processing	2 Pension file over 12: 13			20170303 11:54:06	20170303 11:54:06	1
Workflow Designer						

(*) Number of lines : 50

This menu lists events having to do with exceeding basket minimum and maximum loads. To enable this type of tracking, you must:

- configure a scheduled task
- enable several basket management options of the document management

Basket management

For the basket to track, check that the **MIN** and **MAX** fields have been filled out and check these event options:

- **Monitor Logs**
- **BIS**
- **Activated**

1.13.3. Monitor Processing

This screen gives you an overview of request processing progress

Processes

Requests

Unassigned requests **0**

Number of hits: 91 Pages: 1 / 1 100

No.	<input type="checkbox"/> Request number	Creation date	Date suspended	Date resumed	Status	
1	<input type="checkbox"/> 0	19/01/2017				
2	<input type="checkbox"/> 101	19/01/2017			A	
3	<input type="checkbox"/> 102	19/01/2017			A	
4	<input type="checkbox"/> 103	19/01/2017			A	
5	<input type="checkbox"/> 104	19/01/2017			A	
6	<input type="checkbox"/> 105	19/01/2017			A	
7	<input type="checkbox"/> 106	19/01/2017			U	
8	<input type="checkbox"/> 107	19/01/2017			U	
9	<input type="checkbox"/> 108	19/01/2017			U	
10	<input type="checkbox"/> 109	19/01/2017			U	

The pie chart on the left provides a breakdown of cases by system status:

- **A** Active
- **W** Waiting
- **R** Rejected
- **F** Finished
- **U** Unbound (A record has been created for the request in *CASE_TREATMENT* but it has not been possible to start processing.)
- **E** Error

A click on a portion of the pie lists the processes with this status.

Processes

Requests

Unassigned requests **0**

Number of hits: 10 Pages: 1 / 1 100

No.	<input type="checkbox"/> Request number	Creation date	Date suspended	Date resumed	Status	
1	<input type="checkbox"/> 191	19/01/2017			U	
2	<input type="checkbox"/> 192	19/01/2017			U	
3	<input type="checkbox"/> 193	19/01/2017			U	
4	<input type="checkbox"/> 194	19/01/2017			U	
5	<input type="checkbox"/> 195	19/01/2017			U	
6	<input type="checkbox"/> 196	19/01/2017			A	
7	<input type="checkbox"/> 197	19/01/2017			A	
8	<input type="checkbox"/> 198	19/01/2017			A	
9	<input type="checkbox"/> 199	19/01/2017			A	
10	<input type="checkbox"/> 200	19/01/2017			A	

Note that the Status in the list is one defined in the Designer and set by the user during processing. The status used in the pie chart is managed by *everteam.case*. They are therefore not necessarily the same.

The Unassigned requests link lists requests with no record, perhaps because they have a profile for which no process has been defined. It is therefore very important, as it enables you to identify requests which might otherwise be lost.