

# BizTech Solutions, Inc. Case Study:

## Case Management System for Federal Departments and Agencies



ISV/Software Solutions

This case study represents a case management business process that is used in many Federal Government Agencies and Departments. Case management is used for a broad array of collaborative work ranging from setting up seminars to acquiring and evaluating information to define and direct selected basic and applied research and development projects, where risk and payoff are both very high and where success may provide dramatic advances for traditional civilian agency and military roles and missions.

Many departments have agencies whose mission is to maintain the technological superiority of the U.S. and to increase the efficiency of operations. Some operate in concert with the military and prevent technological surprise from harming our national security. Some sponsor revolutionary, high-payoff research that bridges the gap between fundamental discoveries and their use in many disciplines, like medicine, agriculture, nuclear energy and the military.

### The Business Challenge

The case management process is focused to organize, record, manage and publish cases involving scientific and intellectual concepts, ideas, and studies. Each case is managed by an "owner", and as many as 400 individuals throughout the DoD and other agencies may participate in providing, reviewing, modifying and approving the documents that comprise a case.

An approved case process compiles and advances intellectual and scientific property to support the creation of a research project.

Historically, the case management process began as a manual, paper based process that required large amounts of resource time and money to complete, most of that time in managing and locating the millions of pieces of paper and folders related to the cases.

Over time, efficiencies were achieved using computer networking, email and electronic documents. Yet, it still was managed manually as related material had to be gathered together for approval, storage and publishing.

### The Solution, Results and Benefits

Today, the agency using this case management system has achieved an automated process management, reporting and records storage solution where Workflow Software has been configured and deployed to manage each process. Each case uses a document library and discussion thread in a SharePoint 2003 collaborative Web page.

SharePoint provides a workplace for the temporary storage of all data about a case and workflow provides the discipline to define work tasks and business rules within the process to programmatically manage the timely completion of work.

Workflow captures and reports work performance data and document metadata as the participants perform their roles of contributing, reviewing, approving and publishing case related data.

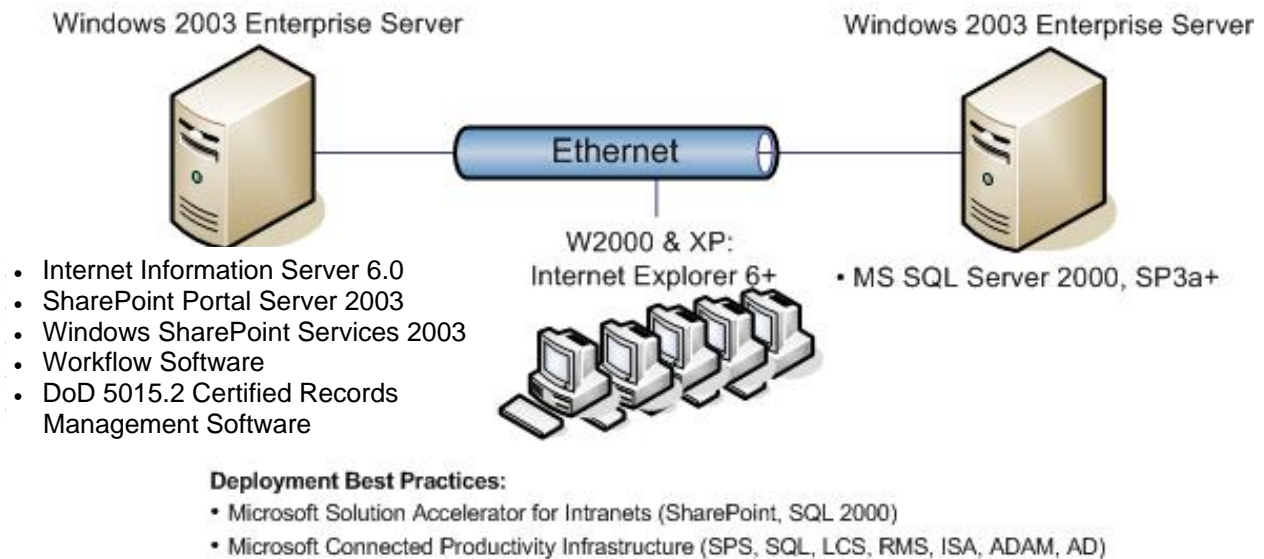
At the end of a case process, the "owner" marks the objects in the SharePoint case package that are to be made official records for automatic storage of each document and related metadata in the DoD 5015.2 Certified Records Management Software as permanent, official records.

In addition, BizTech's 5015.2 compliant, SharePoint 2003 records access solution is deployed. Called PARS (Portal Access to Records Systems), it is used by authorized users throughout the agency for browser based search and use of records from DoD 5015.2 Certified Records Management Software.

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### Technologies Used:



### About BizTech Solutions (GSA schedule GS-35F-0610P)

BizTech Solutions, Inc. ([www.forbiztech.com](http://www.forbiztech.com)) is a Gold Certified Microsoft Partner and a “best of breed” systems integrator for Work Process Automation and Web Business Applications. BizTech is a single source supplier of enterprise products for automation, workflow, document management, digital signing, and e-commerce applications. Our certified engineers and developers provide design, development and “first call” support services from offices throughout the United States. With 20-years process engineering and related LAN/WAN and Internet experience, BizTech creates and supports solutions in numerous industries.



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