

Application Template: Case Management for Government Agencies

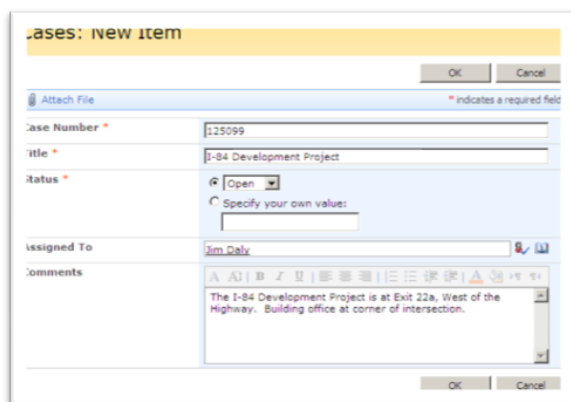
Description of Template

The Case Management for Government Agencies application template for Microsoft® Windows® SharePoint® Services 3.0 helps agencies track the status of open cases. Case administrators can designate whether a case is open or closed, upload supporting documents for a particular case, and assign a case to a responsible case manager. The template also provides user specific dashboards which list cases and tasks owned by the authenticated user. Tasks can be created for each case and supporting documents uploaded to help case managers maintain items and related information in a single location.



Sample Activities Performed in this Application Template

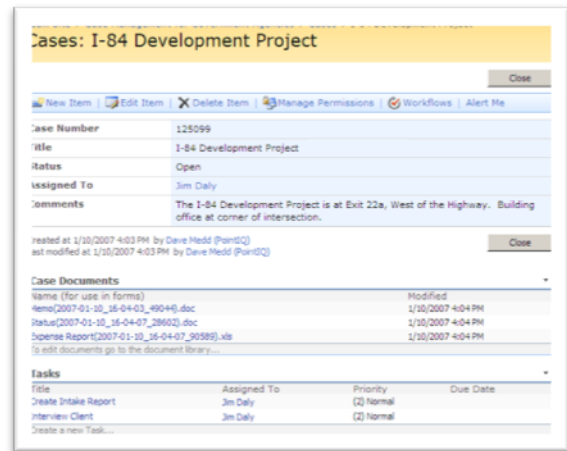
The following examples show the various ways Microsoft anticipates this template will be utilized in a typical organization. If you wish to add additional features, please ask your IT provider to research Microsoft Office SharePoint Designer 2007.



Kim Abercrombie is a manager in the building and planning department of King County, where there are currently a number of developments under construction. Her team is responsible for ensuring these developments are complying with the plans approved by the county as well as providing feedback to others within the department on the progress and success of the individual developments. Her case managers, Jim Daly and Jeff Low, often travel to the sites to visit with the builders and

inspectors. For accounting purposes, they are required to file expense summarizations for each project. They are also responsible for writing up memos and summaries of what they observe and any tasks that should be completed before the next visit.

This morning, Kim has been informed that the new I-84 Building Development project has been approved and handed over to her department for management. Kim opens the Case Management site and clicks on ‘Open a New Case’, entering in the case number, title, status, assigned owner and comments to the web site. She clicks “OK”.



Jim Daly begins each day by logging into his department’s Case Management website from home.

He clicks on “My Open Cases” and sees that there is a new case assigned to him, the “I-84 Development Project”. He clicks on the case to see the detailed information and blank memo, status and expense report templates the system automatically generated for him when the case was created. He clicks on the ‘Status’ memo to begin taking notes on the development and also clicks ‘create a new task’ to begin detailing the process he’ll take to ensure the development is following the rules. He closes the Status memo and saves it back to the Case Management site so others can view the progress of his work.

About Microsoft Windows SharePoint Services 3.0

Microsoft Windows SharePoint Services 3.0 is technology in Windows Server® that offers an integrated portfolio of collaboration and communication services designed to connect people, information, processes and systems both within and beyond the organizational firewall. Now available at no additional charge, the technology provides a platform for developing Web-based business applications. Application Templates provide out-of-the-box scenarios to address the needs of specific business processes.

More Information

For more information on the technologies described in this article, please visit:

Microsoft Windows SharePoint Services 3.0:
<http://www.microsoft.com/sharepoint>

Application Templates for Windows SharePoint Services:
<http://www.microsoft.com/sharepointapps>

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