Case Management System Modernization

Jeskell enabled the client to save time and money while getting exactly what they wanted.

The Procurement department of a federal civilian agency partnered with Jeskell and IBM experts to develop a custom-made software application to manage their paper-based documents, leading to procedural simplification, time savings, and lower costs.

THE CHALLENGE

The Procurement office of a federal law enforcement agency was overwhelmed by the ever increasing workloads with no expansion in staff. The paper-based system required employees to work in the office—telecommuting was out of the question—and the burden of making manual copies of every file required by the many FOIA requests was becoming a bigger problem. This process meant hours spent in the copy room, as well as many hours of finding, retrieving, and returning physical files to their correct location. Tedious and time-consuming, the office decided to modernize with an electronic document management system.

The procurement office didn't want just any system—they were only interested in a system that met its specific needs. Off-the-shelf solutions proved elusive: although some options met some of the department's requirements, none met all of them. Those that came closest would require at least some customization—at a significant cost, and with vendors who did not want to undertake the effort.

THE SOLUTION

Jeskell suggested a different approach: *starting* with customization, rather than ending with it.

Working collaboratively with a small group of client representatives and IBMers, Jeskell began by digging into the department's requirements. The Jeskell Account Executive on the project, a former Systems Engineer himself, spent significant time studying the end users' day to day processes, needs, operating environment, and bottlenecks. His research led to several key conclusions:

Consistency – Visual and organizational consistency needed to exist between the physical and new, electronic systems. The client's employees had worked with the existing system for a long time, and a total organizational overhaul would have been too disruptive. Consequently, the electronic file system was designed to look like the physical system, down to folders, flaps, and tab arrangement and color.

Consolidation – Each physical file contained a number of data points and deadlines that had to be tracked by each team member. To streamline the process, the Jeskell team created a main page for each file, where all "high level" information—including important deadlines—was all viewable on a single screen.

Ease of Use – The electronic system was designed with user experience in mind, enabling file-sharing between workers; telecommuting; access to any document inside the client's network; and the ability to subset parts of the file for FOIA, GOA, or Congressional inquiries.

In addition, the program offered the following features:

- Role based access control (RBAC).

- Ability to mark parts of the file as private, only accessible by the case owner

™

- Verification that the file and any processes incorporated into the application met all the requirements of the Federal Acquisition Regulations (FAR)

- Setting and display of milestones and reminders

- Indication of a complete file and sections of a file

- Case blog to record all incidental notes about the project/file

- Incorporate work groups for the Contracting officer, Compliance and audit

- Ability to share parts of the project with other groups within the agency, such as the Office of General Counsel Commercial Law Branch and Finance

- Establishment of a vendor data base to retain information of vendors previously used

- Reporting capability to produce all the reports that may be requested/required by the client and or Congress

- Ability to interface with the Department's Financial Management System.

THE OUTCOME

By avoiding a full-on custom build, the client saved time and money while getting exactly what they wanted. The Jeskell system was a series of customizations and custom application modules on top of a tried and true Content Management store. The application allowed them to collect, organize, and manage their entire file system, while managing milestones and deadlines in the same system.

After nine months of close collaboration, the client gained a custom-made solution that not only met but exceeded end users' expectations and was delivered on time and on budget. Consequently, the Jeskell and IBM team was later asked to expand on the application's success rolling out to a full regional and field deployment while adding yet more function.

To learn more about Jeskell's quality and expertise–based approach to Case Management and Electronic Content Management, please contact Greg Lefelar.

Greg Lefelar, Sr VP of Sales
Jeskell Systems, LLC
glefelar@jeskell.com
(301)922-1373 (mobile)

COMPANY INFORMATION

Designated Small Business
Tax ID: 27-3553035
Dun & Bradstreet: 049085119 CAGE Code: 66KP5
HQ: 6201 Chevy Chase Drive Laurel, MD 20707
(301) 230-1533
www.jeskell.com