

# Newgen Case Management Framework



# Introduction

Today organizations face the challenge of addressing the increased expectations from citizens, businesses, elected officials, and employees. Pressed to provide services and information quickly and cost effectively, organizations often saddled with legacy information systems, fail to get an enterprise-wide view of operations.

As enterprises move toward an era where relatively fewer skilled resources must now tackle more varied work, jobs are getting smarter. Fueled by this trend toward smart jobs it has become imperative for businesses to control the costs and risks associated with flexible, unstructured, and even ad hoc business processes. Driven by the need to enhance customer experience, and address the ever-changing requirements that regulators, auditors, and litigants place on businesses, there is an increased demand for Case Management.

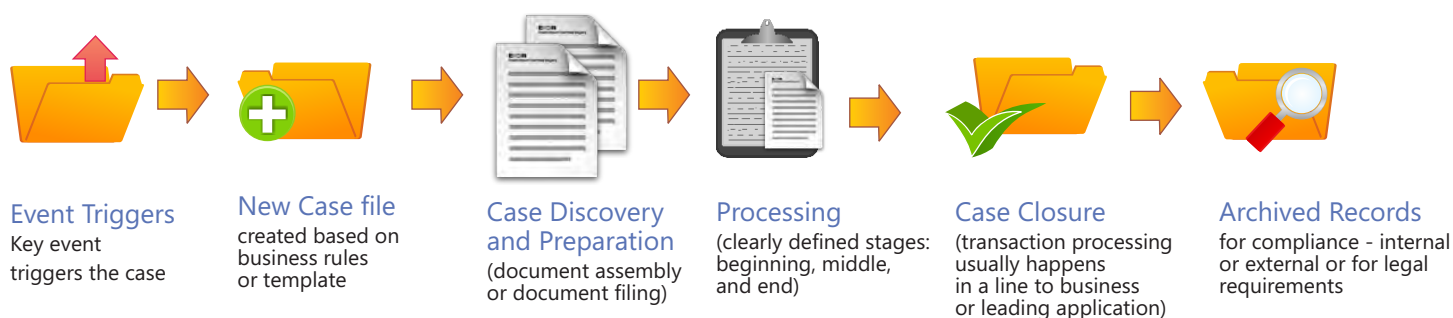
Newgen's Case Management Suite encompasses the following key areas:

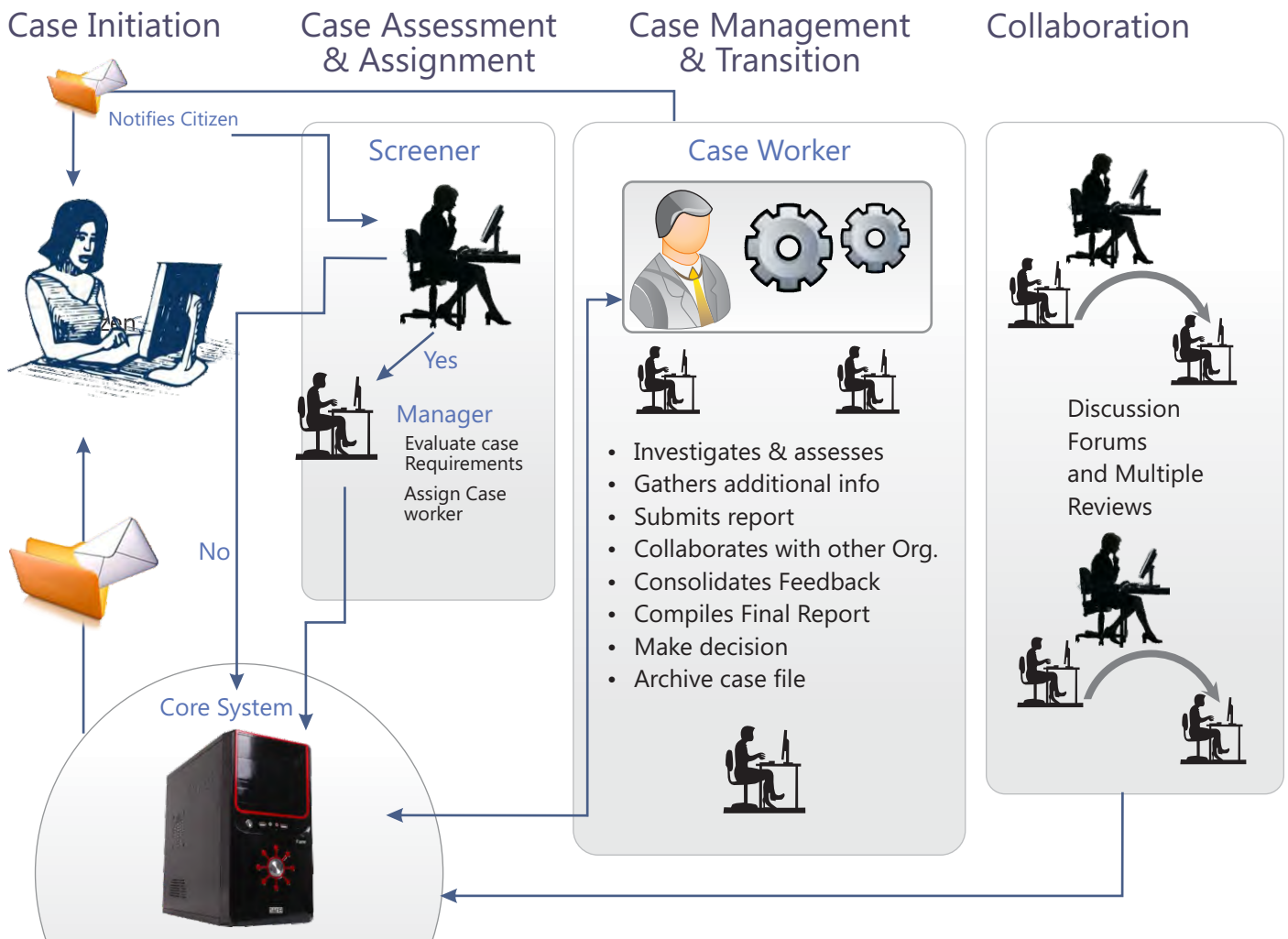
- Investigative Case Management– Audit requests, Regulatory queries etc.
- Service Request Management- Customer Request Management, Claims, Customer On-boarding, Loan Origination, Grants Management, etc.
- Incident Management: Complaint Management, Dispute Resolution, etc.

## Customer Success Stories:

- ❑ Case Management solution for automating the Complaint Management process for one of the largest healthcare organizations in the United States, which provides managed care services targeted to government-sponsored healthcare programs, focusing on Medicaid and Medicare; the Newgen solution enabled the organization to achieve 75% adherence to SLA, 95% Compliance level and 72% reduction in staff required for complaint handling.
- ❑ Case Management solution for handling Public Grievances, for one of the largest Government Agencies in Asia, which monitors government functioning. The Case Management solution automated the process of handling grievances and graft prevention requests raised by citizens; The solution enables the government agency to expedite redressing of public grievances, and to provide speedy justice, efficiently and accurately.
- ❑ Case Management solution built over the Newgen's OmniFlow suite to manage legal cases for one of the largest Attorney Firms in India; The solution automated the Legal Case Management process to track all the cases coming to the organization. The solution for end-to-end Case Management enabled efficient tracking and monitoring of processes and better resource utilization, leading to increased productivity levels.

## Typical Life cycle for Case Management Applications





## Newgen's Unified Case Management Framework:

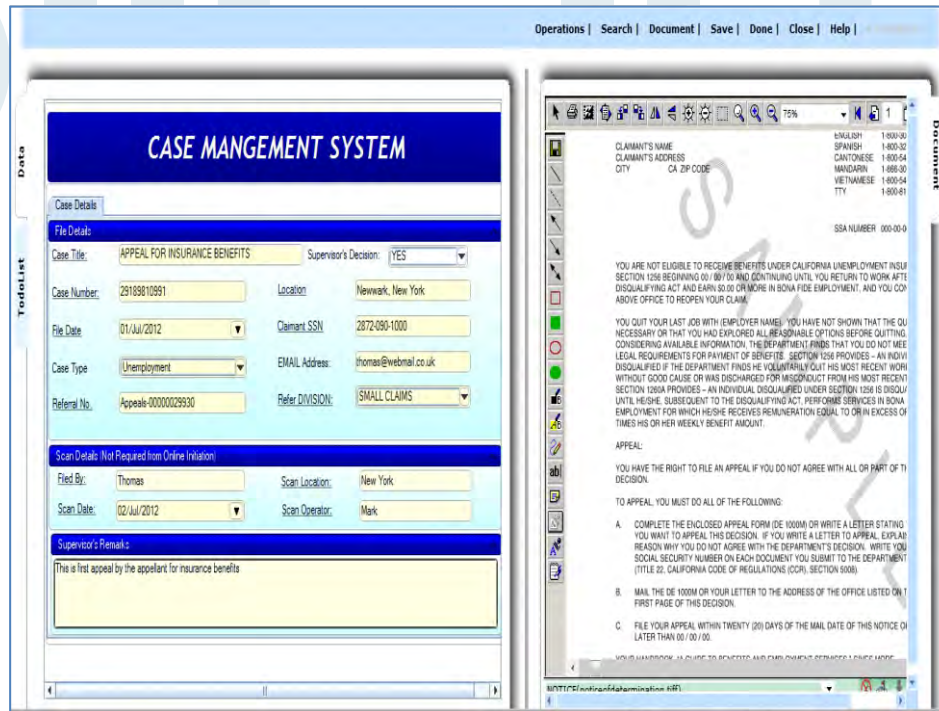
Newgen has a Comprehensive Case Management suite with strong Document Management, Imaging, Scanning, Records Management, and BPM capabilities. Newgen's ECM and BPM products are being used by leading customers in Government, Banking, Insurance, Financial Services, Business Process Outsourcing, and Shared Services sectors, across the globe, for managing their content and business processes.

## Comprehensive Content Capture - Acquisition of Documents of various types from various sources as a single Case File

Information required to process a case exists in multiple formats such as paper, electronic document, image, e-mail, voice mail, etc. Newgen's Comprehensive Capture Solution provides the ability to capture various inbound content objects into a Case Folder.

Newgen's Distributed Scanning engine enables organizations to scan documents at branch offices and send them to the central location electronically. This significantly reduces the process turn-around-time, document shipping cost, and risks associated with physical transfer of documents.

Automated Data Extraction is supported for both structured documents such as account opening forms, and semi-structured documents such as invoices, using OCR, ICR, MICR and Barcode.

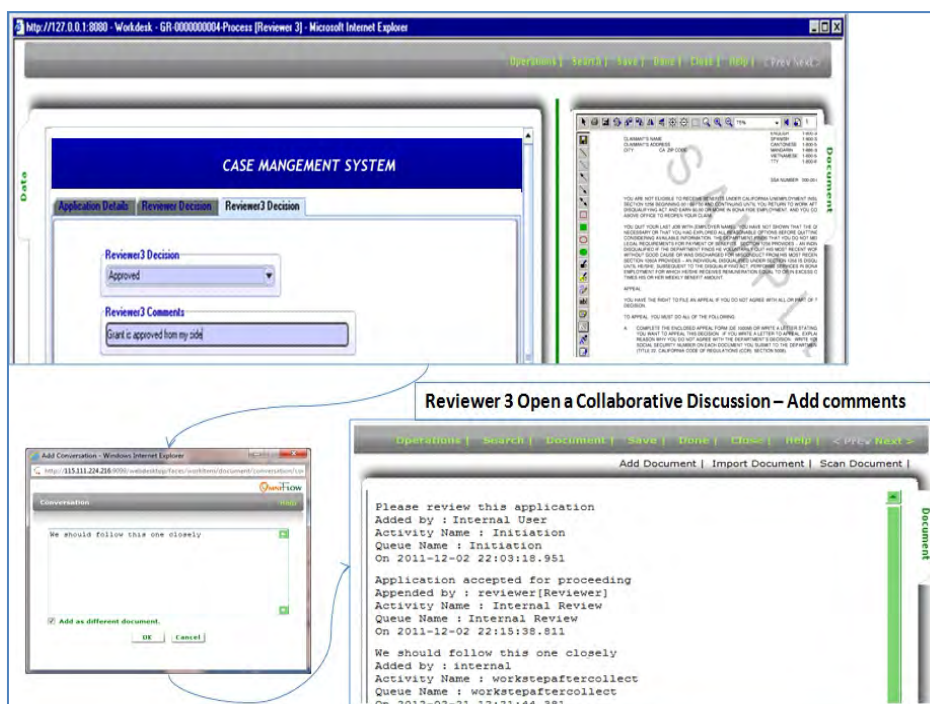


## Dynamic Action Performed on a Case

- Ad hoc, parallel, sequential, and fixed routing of cases
- Available actions are group-specific and role-specific
- Ability to add more content or work automatically, or on ad hoc basis
- Escalations management based on rules
- Ability to save ad hoc manual cases and tasks as templates
- Ability to suspend cases automatically using events, as well as manually

## Collaborative working on any case

- Keeps log of work done by each worker on a case
- Support for parallel and asynchronous work – multiple caseworkers can work simultaneously on the case
- Web access allows third-party users to collaborate on cases





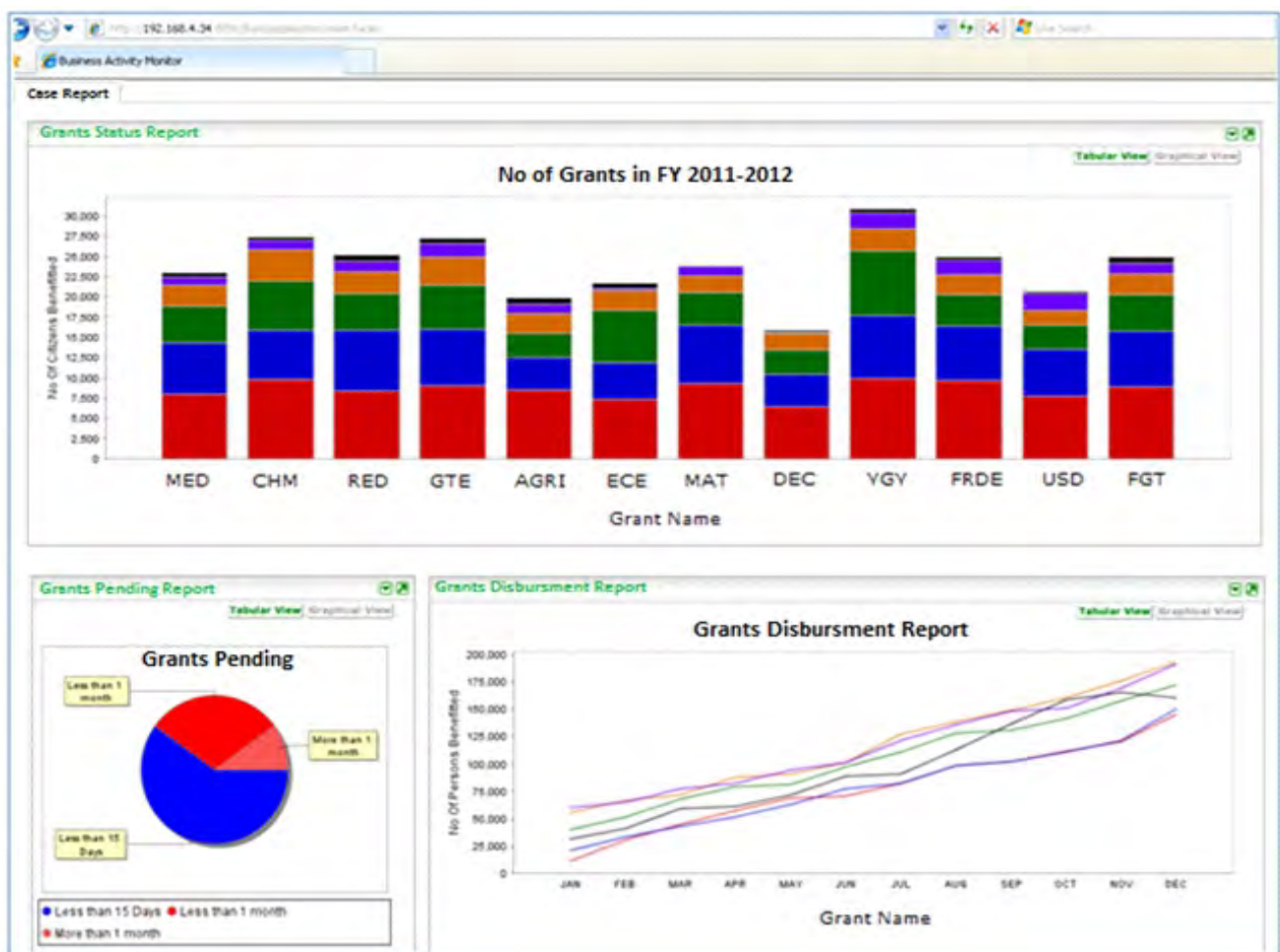
## Comprehensive Document Management

Case-related information is generally received and managed in the form of business documents. Thus a case management platform must include a complete document management system, a comprehensive facility for creating, capturing, indexing, storing, finding, viewing, sharing, editing, versioning, and retaining a wide variety of document types. While some of these functionalities can be required by the case template, others may be added on ad-hoc basis at runtime. A single document may be referenced by multiple cases, and its lifetime is independent of the cases that use it.

## Performance Monitoring and Reporting

Newgen's Business Activity Monitor (BAM) is a real-time monitoring component of Newgen's platform-independent, scalable Business Process Management solution. Built using open technologies, it has seamless integration abilities, allowing it to be introduced into any IT infrastructure. BAM gives an end-to-end visibility into the business processes, by providing accurate information about the status and results of various operations, processes, and transactions, allowing the user to address the problem areas and resolve the issues within his/her business process.

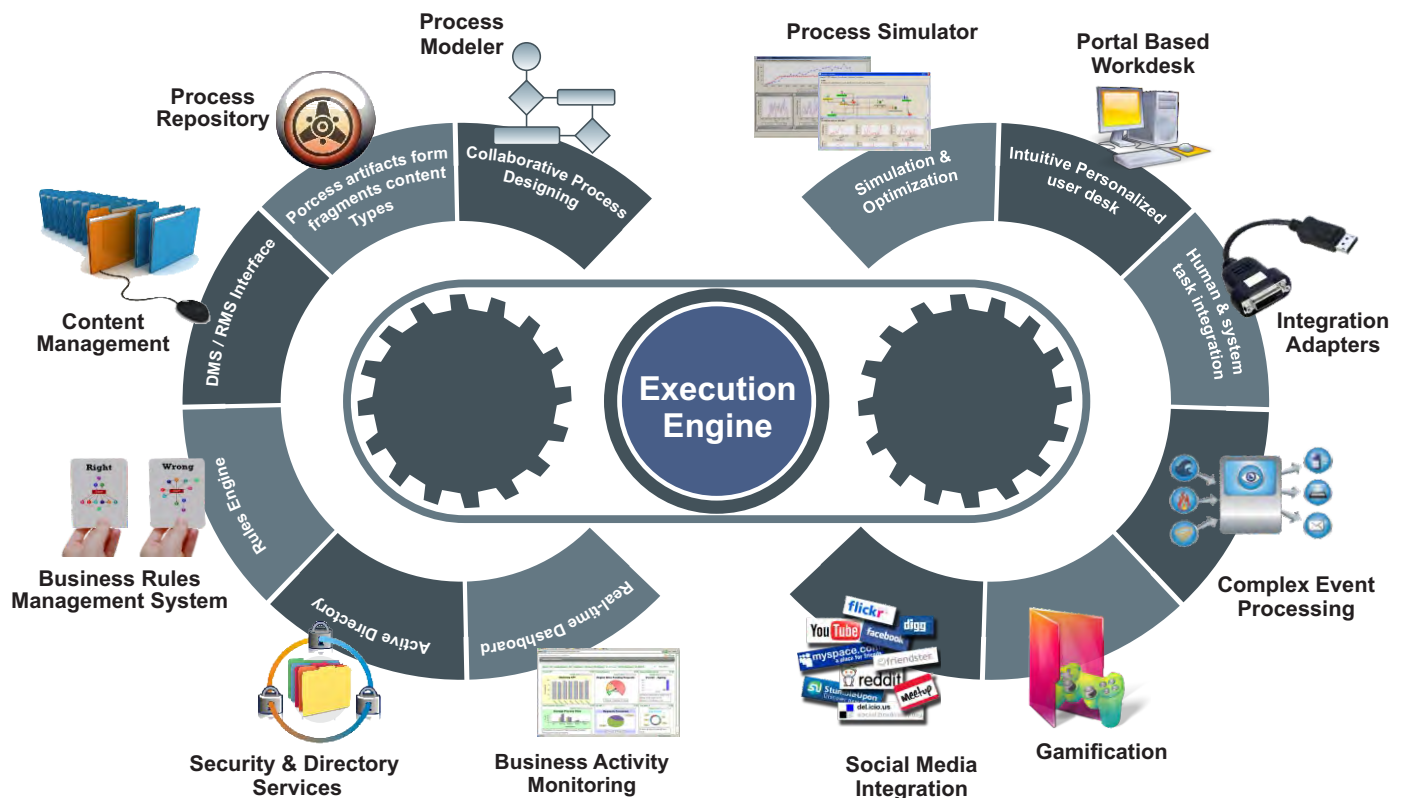
### Real-Time Dashboards for Viewing Case/Grants Status



## Benefits of using Newgen's Case Management

- Highly configurable and built on robust BPM platform
- Create and deploy new case types - from scratch or from existing case types
- Supports ad hoc workflow and collaborative working on cases
- Define sub-cases, tasks, TATs, and content for each case
- Audit trails are generated which keep track of all system and user actions
- Inbuilt Rules Management engine that records the specific policy applied at every step which ensures compliance

## Newgen Case Management Suite



# Newgen's Product Portfolio



## Business Process Management Suite

OmniFlow is a platform-independent, scalable Business Process Management Suite (BPMS) that enables automation of organizational business processes. OmniFlow is designed to ease the creation, deployment, modification and management of Business Processes. Built using open technologies, it has seamless integration abilities allowing it to be introduced into any IT infrastructure.



## Enterprise Content Management Suite

OmniDocs is an Enterprise Content Management (ECM) Suite for creating, capturing, managing, delivering and archiving large volumes of documents and content. OmniDocs manages Scanned Document Images, Electronic Documents and Emails as records. It also supports seamless integration with other enterprise applications.



## Customer Communication Management

Newgen's Omni Output Management System (O2MS) delivers smarter and targeted communications for better customer experiences. It offers the capability of leveraging prime paper space for customer-centric inline advertisement and consolidation across multiple products. It enables secure communication on improved templates with rich designs and graphical representation of analytics across multiple distribution channels. In addition easy archival & retrieval of correspondences for presentment, and efficient customer request resolution are achieved using this enterprise application.



## Enterprise Reports Management and Archival

OmniReports stores trillions of computer-generated output pages and reports in a highly compressed form. It has a high-speed ingestion process with simple interactive definitions, enables instant access to terabytes of reports independent of business application, and is fully searchable at field/row/page levels. OmniReports is ideal for sun-setting of business applications as well as optimizing core system performance by purging historical reports.



## Distributed Capture Solution

Newgen's cloud solutions, provides a process platform on cloud to the customers. Developed using Newgen's enterprise class Enterprise Content Management (ECM) & Business Process Management (BPM) suites it leverages the company's deep domain expertise and industry best practices to derive quick quantifiable business values to customers. The solutions are available on both public and private cloud to create dynamically scalable and highly reliable enterprise application.



## Forms Processing Engine

OmniExtract is the data capturing solution which extracts business-critical information from image documents and forms. It can extract hand-printed/handwritten characters, optical marks, barcode, machine-printed characters and MICR fonts.



## Invoice Processing System

Newgen's Invoice Processing System, with automatic data verification and validation capability, is a solution for automatic data capture from semi-structured invoice documents. It also supports seamless integration with SAP and other ERP's.



## Image-Based Check Clearing & Payment

Newgen's ChequeFlow is an image based Cheque Processing solution for inward and outward clearing. Advanced and highly configurable sub-systems for Automatic Signature Verification, FOREX Cheque Processing, PDC Management, ECS/ACH mandates, add-ons for Cheque Deposit Machine/Kiosks.



## Governance, Risk & Compliance

Compliance Manager is an integrated solution for Governance, Risk and Compliance that's geared to ensure compliance with standards, best practices and guidelines of various regulatory acts.



## Production and Distributed Scanning Suite

OmniScan is a production scanning engine for document image capture. It enables scanning of different type of documents in different properties without human intervention using powerful scripts. The inbuilt export and integration feature allows using it as a scanning workstation with any Document Management and Workflow system.



## Mobile Capture Application

ZapIn is a highly secure application that helps a banking executive on-the-move, to capture customer information and instantly initiate its processing at the back-office. ZapIn is available both on Mobile phones and Tablets. The key to the application is our advanced image processing that ensures high quality images and minimal size making it viable to be transferred over a GPRS/3G/4G networks.

## Award Winning Case Management Implementations

HSBC

INFO EDGE  
INFO EDGE (INDIA) LTD.

Lakshmi Kumaran  
& Sridharan  
ATTORNEYS

## Newgen Clients includes

DSIR  
Department of Scientific and  
Industrial Research

ICICI Bank

IndusInd Bank

WellCare  
Get more from your Medicare™



future group  
Ukha hai. Aaj. Abhi.

Coca-Cola

المشرق  
mashreq

Ecobank  
The Pan African Bank

بنك أبوظبي التجاري  
ADCB



## About Newgen

Newgen is the leading provider of a unified digital transformation platform with native process automation, content services, and communication management capabilities. Globally, successful enterprises rely on Newgen's industry-recognized low code application platform to develop and deploy complex, content-driven, and customer-engaging business applications on the cloud. From onboarding to service requests, lending to underwriting, and for many more use cases across industries. Newgen unlocks simple with speed and agility.

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