Microsoft Dynamics CRM Case Management process demo script

Using the Public Sector Case Management process in Microsoft Dynamics CRM 2013

Login

For this demo, recommended users are:

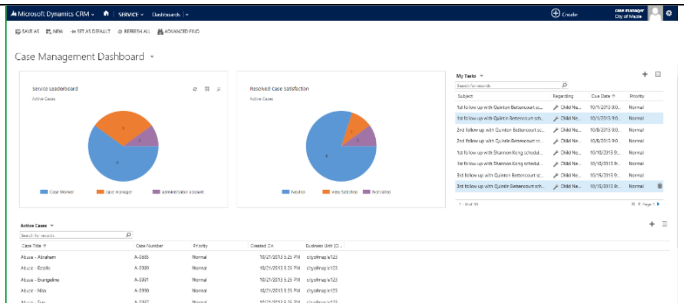
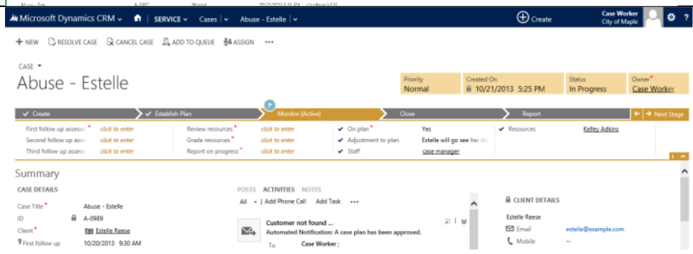
- Case worker - caseworker@CityofMaple123.onmicrosoft.com
- Case manager - casemanager@CityofMaple123.onmicrosoft.com

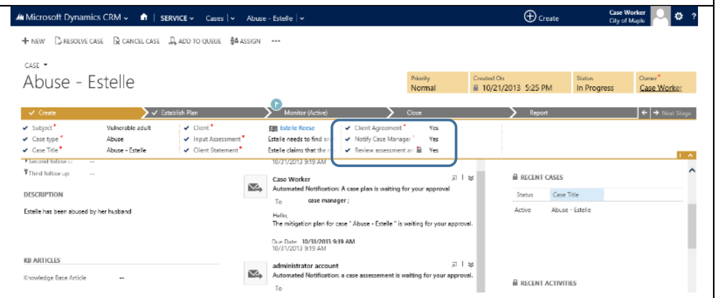
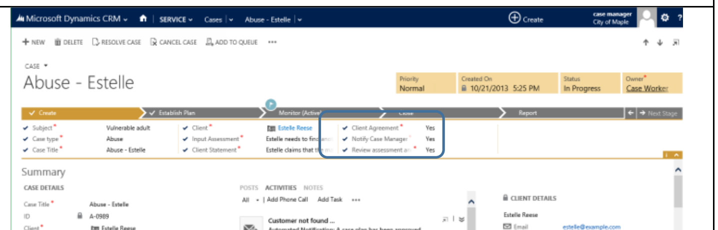
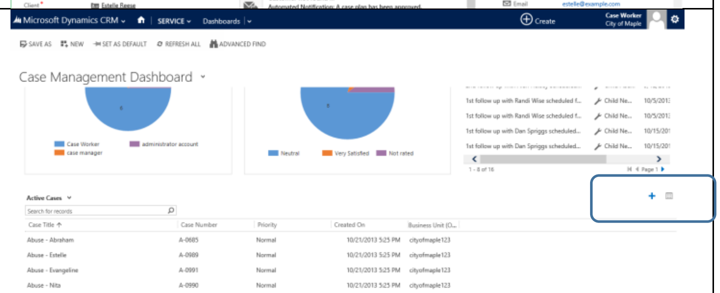
Item of note:

- The password for all users is: pass@word1
- When logging in, do no check "remember password"
- You will need to log out and re-login when moving from one user to another

What to Show

- Start the demo from the Case Management Dashboard

What to Say	What to Do	Screen shot
From the Case Management Dashboard the Leader (manager) and/or worker has a graphical view of the active cases and assigned tasks. Plus a listing of all active cases.	Log in as the Case Manager	
This particular case "Abuse – Estelle" is in the monitoring stage. Not the activities that have already taken place of notifying the manager to approve the assessment and plan where sent. Review the screen and the additional items in the Summary, such	From the Case Worker, list of active cases, find the Abuse – Estelle case. Right click and open the case.	

as KB articles (links out to SharePoint).		
Notice that the case worker has completed the necessary tasks in each of these steps. Some of the fields have a lock next to them. Meaning that the manager is the only one that can change the values of these fields. In the instance of “Review assessment and approve”, the manager needs to say change this field before moving on to the “Establish plan” step.	Click on Create and Establish	
You can see from the case manager that this same field does not show the lock.	Switch to the case manager role	
Let’s take a look at the total process. Creating a new case.	Switch back to the case worker dashboard. Then click on the plus sign in the upper right corner of the active cases	
As you can see the case worker is guided through the process step by step, which fields are required.	Complete the create step through notify case manager. Then save and refresh the screen.	
Notice now that an email has been seen to the manager letting him know that the case needs approval of the assessment.	Under activities an email should show up	
If I open up the case I just created, the manager reviews the assessment and approves. Then advances the case to the next stage.	Switch to the manager and open the case you just created. Click on yes for the Review assessment and approve. Save and refresh	
Notice an email has been sent to the case worker letting him know that the assessment has been approved.	Switch back to the case worker	
Continue this process through the case, swithing from case worker to case manager		

As you can see as we continue through the process the case worker is able to keep track of where he is in the process, while everyone has been notified at various stages. This notification process has been built into this example, but can be adjusted to meet your specific needs.		