

SUMMARY

WorkView | Case Manager (12) provides case workers with a 360° view of all the information they need to drive the—often unpredictable—processes that require their knowledge and expertise. A complete toolkit enables the creation and rapid deployment of “document aware” case management solutions that are natively integrated with the OnBase suite of products. Organizations can eliminate disparate data management methods, such as spreadsheets and departmental databases. Whether managing service requests, resolving issues or qualifying opportunities, control all aspects of the case including tasks, documents, forms, and events. Make better business decisions and maximize productivity by connecting the right people with the right information at the right time.

BUSINESS IMPACT

- **Provides a consolidated, 360° view of “the case”** including all data records, related documents and processes
- **Enables creation of high-value, low cost, rapidly deployable solutions** without custom application programming
- **Maximizes knowledge worker productivity** by reducing the need to search for information across multiple data sources
- **Natively integrated with the OnBase product suite** and able to leverage all enterprise-class content management capabilities
- **Scales to any size solution**, with the ability to create business applications that range from departmental to enterprise-wide

BUSINESS APPLICATION

- **Service Request Management:** *Employee Onboarding, IT Projects, Contract Management and Permitting Applications*, are just some examples of the types of service requests that need to be managed by knowledge workers. From the moment cases are assigned, they require a multitude of tasks and activities until they are completed or fulfilled. Use WorkView | Case Manager to access and control all of the information in one place, enabling easier accessibility and faster decision making.
- **Incident/Issue Resolution:** WorkView | Case Manager can be used to document and manage all the interactions and discrepancies that occur in the life of any typical business process. Eliminate the need for a user to search for information across disparate data sources in order to resolve *Help Desk Tickets, Collections Disputes, Service Complaints or Quality Management Issues*. Provide visibility to all of the information—and a complete history of related issues—in one unified view.
- **Investigative Case Management:** From *Recruitment to Loan Underwriting to Audit Requests*, the unpredictable processes tackled by case workers are many. From a single interface, case workers can drive these processes and all related activities, including documenting progress, delegating tasks, scheduling appointments, and more. Workers’ knowledge and a complete history of all activities are captured as each case moves through the process, and can be applied to better manage future cases.

KEY FEATURES

- **Point-and-click configurable framework** for rapid solution creation and deployment
- **Integrated screen designer** allows for complete customization of views and screens for all users
- **Links related folders and documents** to a WorkView | Case Manager record
- **Capture history and event logs** for a complete and permanent record of all interactions and activities
- **Natively integrated with OnBase Workflow** allowing data records to be routed through Life Cycles and the automated execution of work without the need for custom scripting
- **Displays a complete view of business data** including data from disparate, external data sources



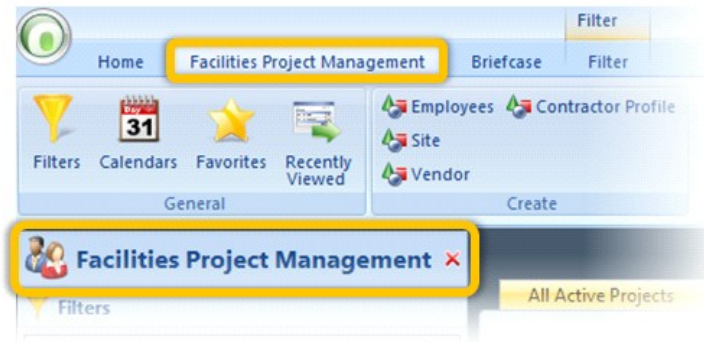
Case workers have a complete 360° view of all case-related information tailored to their job role, including data records, documents, forms and history. From a single interface, they can drive all activities, such as task delegation, events scheduling, and status monitoring—managing the case end-to-end to achieve the desired outcome.

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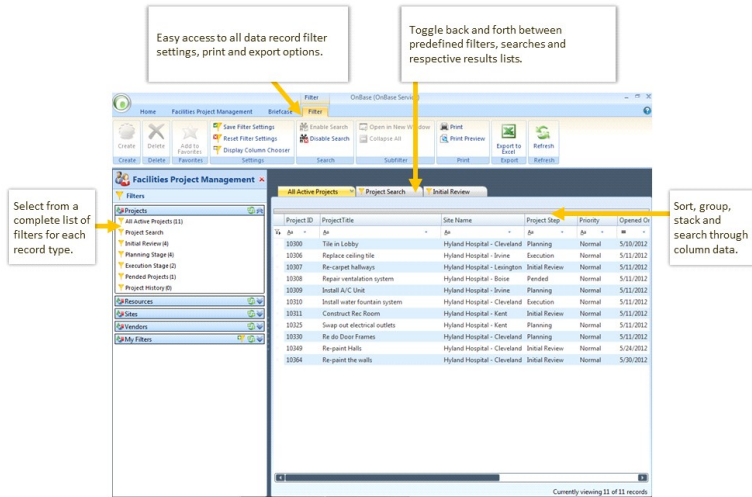
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Name your applications in your business language.



Unity Client Application Filter screen.



360° view of all case information in the Unity Client.

