

ONBASE

WORKVIEW | CASE MANAGER

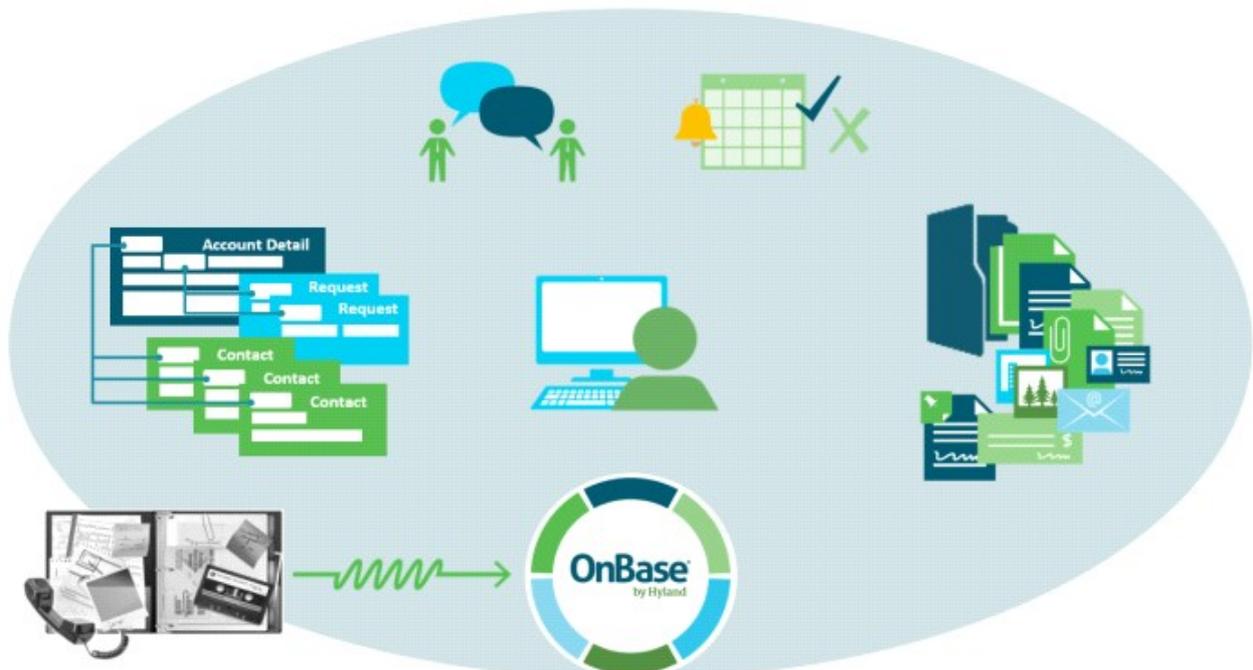
SUMMARY

WorkView | Case Manager provides case workers with a 360° view of all the information they need to drive the—often unpredictable—work that requires 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.

BENEFITS

- **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** 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

DESIGN



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.

APPLICATIONS

- **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.

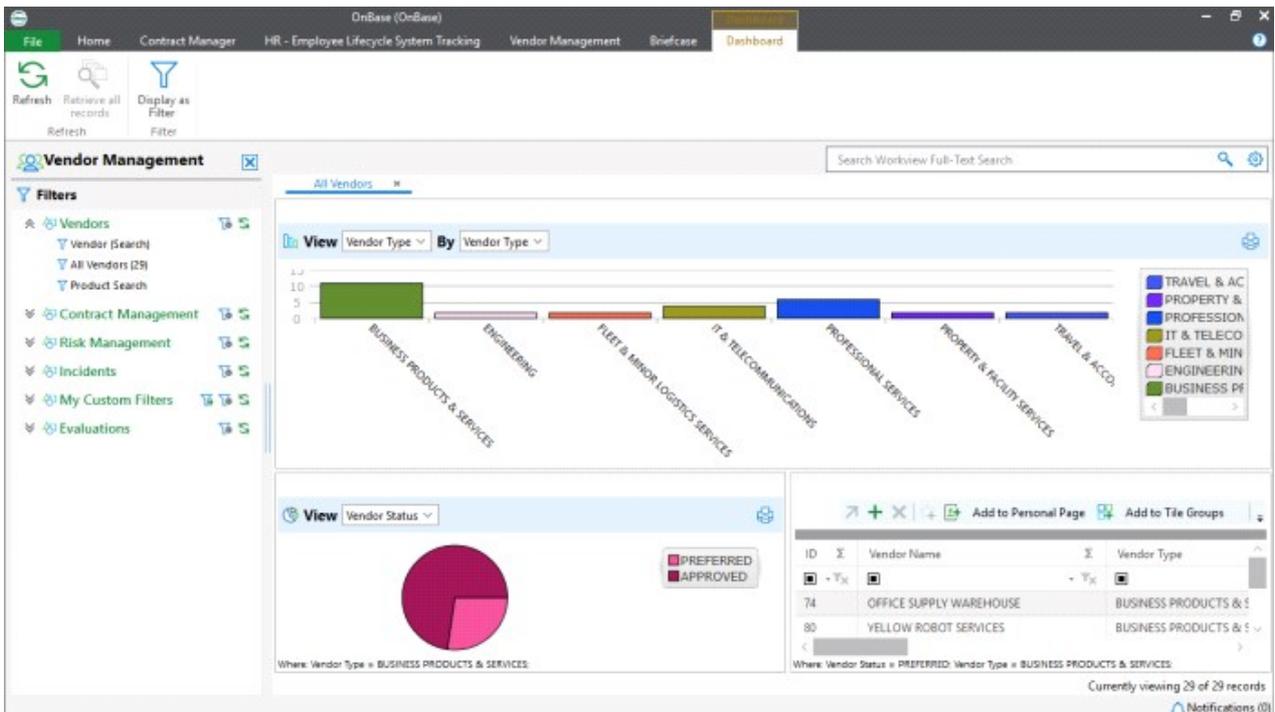
KEY FEATURES

- **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
- **Automatically 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

INTERFACE

ID	Vendor Name	Vendor Type	Description	Primary Vendor Contact
117	HYLAND SOFTWARE INC.	IT & TELECOMMUNICATIONS	Develops the ECM Suite known as OnBase. Solves business problems related to doc management, case management, business process management, etc.	Steve Tillman
122	BARACUDDA FIREWALLS	IT & TELECOMMUNICATIONS	World class firewall software	JOHN ARROW
134	BECHTEL	ENGINEERING	shipping	MARK GRIMES
143	PHIL'S LAWN CARE CO.	PROFESSIONAL SERVICES	Lawn care company in Westlake, Oh.	PHIL SIMONE
148	TALLMAN SOLUTIONS LTD	IT & TELECOMMUNICATIONS	Case Management solution provider.	
207	DERRICK'S EMPORIUM	BUSINESS PRODUCTS & SERVICES	Derrick's is the new proposed vendor for our kitchen supplies	
208	SERVE-A-LOT	BUSINESS PRODUCTS & SERVICES	We need to find a vendor for our growing needs for server administration.	
209	PAULA'S DONUTS	BUSINESS PRODUCTS & SERVICES	Paula makes the best donuts. We should make her the vendor of choice for donuts during Monday Morning Meetings.	
64	COMPASS LOGISTICS	FLEET & MINOR LOGISTICS SERVICES	Compass Logistics picks up and delivers anywhere in the Continental United States.	FRED THOMAS
66	EMPIRE BUILDING	BUSINESS PRODUCTS & SERVICES	Empire Building designs and constructs land and sea oil platforms. They also assist in the design of specialized equipment.	EMILY ANDREWS

Your application's name displayed in the Ribbon and over the Filters panel on the left. Select a Filter to search and your results are displayed on the right. Features to work with your data are easily accessed on the Filter Ribbon.



With a click of a button, view your search results as a Dashboard and visually drill-down through your data.

The screenshot shows the detailed view of a vendor record for 'OFFICE SUPPLY WAREHOUSE'. The page includes a navigation bar with tabs for General, Product, Contract, Performance, Incidents, Additional Contacts, Notes & Tasks, Administration, Subcontractors, and Demo Admin. The vendor details are organized into sections: Vendor Details, Primary Vendor Contact, and Point of Service.

Vendor Details:

- Vendor Name: OFFICE SUPPLY WAREHOUSE
- Vendor Type: BUSINESS PRODUCTS & SERVICES
- Account Owner: Tom Davis
- Address 1: 122 SOUTH LINCOLN ST.
- City: KENT, State: OH, Zip Code: 44240
- Phone: (330)658-9636, Fax: (330)785-6885, Website: WWW.OFFICESUPPLIES.COM
- Description: Office Supply Warehouse provides quality office supplies to local businesses.

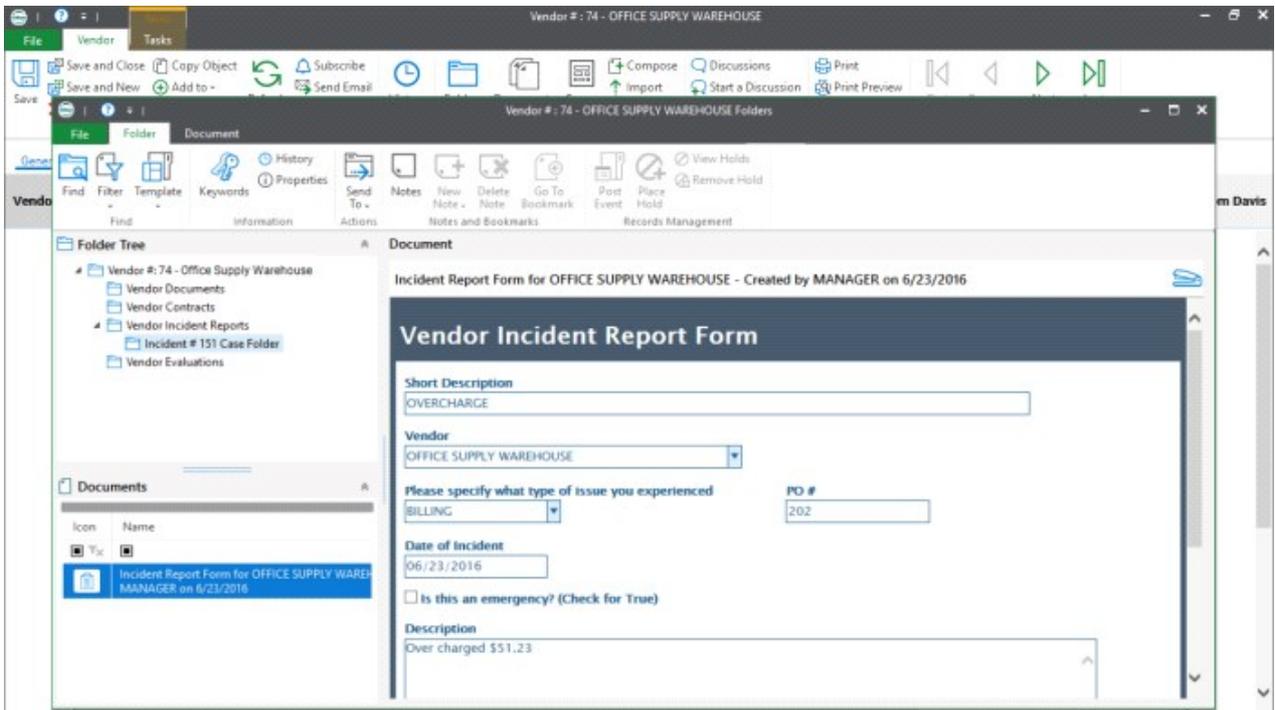
Primary Vendor Contact:

- Full Name: SAM WEST, Title: ACCOUNT MANAGER, Phone 1: (330)857-9878, Email: SAM.WEST@OFFICESUPPLIES.COM

Point of Service:

Location Name	Location	Location Phone
<input type="checkbox"/>	OFFICE SUPPLY WAREHOUSE - CLEVELAND	3695 E. 34TH ST. CLEVELAND, OH 44105 216-758-3655

Select and view the data record you wish to work with, and browse all of the related data via the tabs.



With a click of a button, see all related documents organized into a familiar folder view.

Learn more at <https://www.idt-inc.com/case-management/>

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