

SUMMARY

WorkView | Case Manager (13) 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** 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

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.

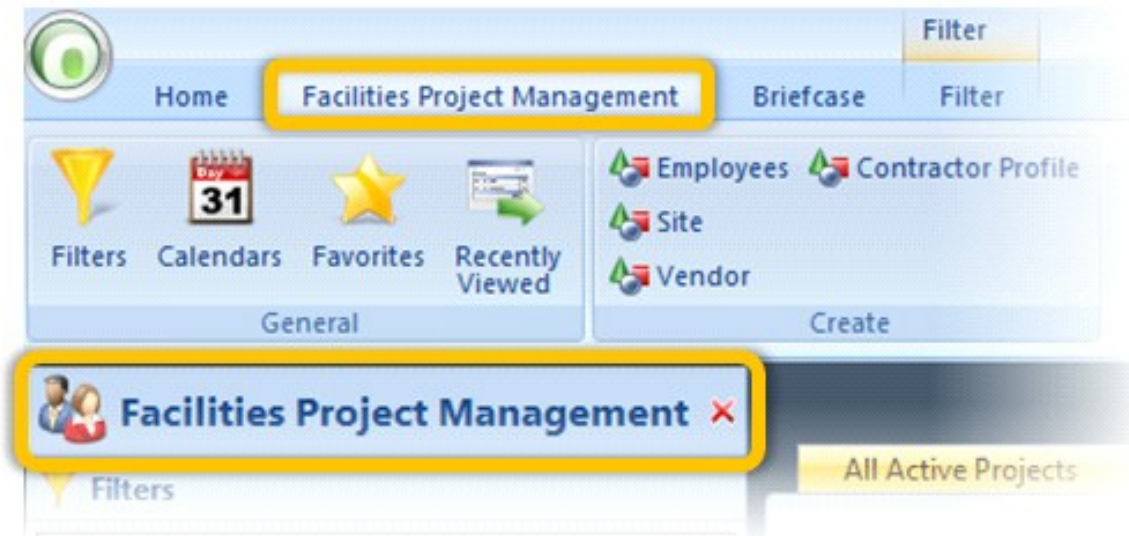
APPLICATIONS

- **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
- **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



Name your applications in your business language.

Easy access to all data record filter settings, print and export options.

Toggle back and forth between predefined filters, searches and respective results lists.

Select from a complete list of filters for each record type.

Sort, group, stack and search through column data.

Project ID	Project Title	Site Name	Project Step	Priority	Opened On
10300	Tile in Lobby	Hyland Hospital - Cleveland	Planning	Normal	5/10/2012
10306	Replace ceiling tile	Hyland Hospital - Irvine	Execution	Normal	5/11/2012
10307	Re-carpet hallways	Hyland Hospital - Lexington	Initial Review	Normal	5/11/2012
10308	Repair ventilation system	Hyland Hospital - Boise	Pended	Normal	5/11/2012
10309	Install A/C Unit	Hyland Hospital - Irvine	Planning	Normal	5/11/2012
10310	Install water fountain system	Hyland Hospital - Cleveland	Execution	Normal	5/11/2012
10311	Construct Rec Room	Hyland Hospital - Kent	Initial Review	Normal	5/11/2012
10325	Swap out electrical outlets	Hyland Hospital - Kent	Planning	Normal	5/11/2012
10230	Re do Door Frames	Hyland Hospital - Cleveland	Planning	Normal	5/11/2012
10349	Re-paint Halls	Hyland Hospital - Cleveland	Initial Review	Normal	5/24/2012
10364	Re-paint the walls	Hyland Hospital - Cleveland	Initial Review	Normal	5/30/2012

Currently viewing 11 of 11 records

Unity Client Application Filter screen.

Easy access to all tasks relevant to the current state of the case.

Toggle through all of the data stored in the case record by clicking the tabs.

Case header can be configured to display standard information and can even change color and text displayed based on case status.

Scroll through and update all case data in the record view.

Integrated folder panel presents an organized view of all related documents.

Folders, history, and documents buttons provide easy access to all related data.

Project ID: 10300 - Tile in Lobby (Last Modified: 5/30/2012 12:20:03 PM)

Project Information | Project Budget | Risk Assessment | Safety of Patients | Project Resources | Project Risks

Project ID: 10300 | Project Priority: Normal | Project Start: 5/14/2012 | Project Manager: Bob Jones

Project ID	Project Step	Priority	Project Manager
10300	Planning	Normal	Bob Jones

Project Title: Tile in Lobby

Key Dates:

Request Received	Target Completion Date	Project Start Date	Actual Completion Date
5/10/2012	6/29/2012	5/14/2012	

People Affected:

Business Unit	# of People	Square Footage
Accounting	12	200

Invoice for Project

Turkelton Tile
New England Square
12 West Park Place
Oxford, OH 45056

Invoice No. 106

Customer: Keith Felker - Hyland Hospital
Address: 28500 Clemens Road, Westlake, State OH, ZIP 44145
Phone: 555-123-4567

Date: 5/27/2012
Invoice No. 106
PO No. 15995

Qty	Description	Unit Price	TOTAL

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

**HYLAND
SOFTWARE**

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