



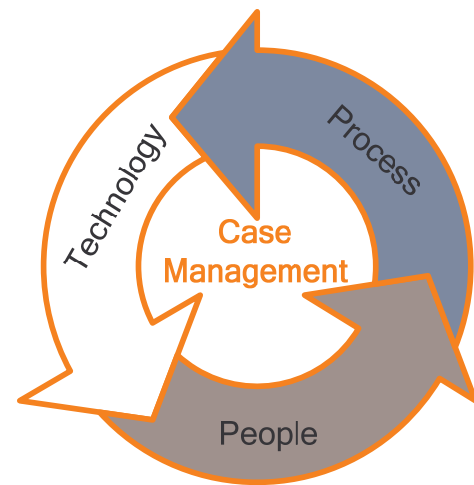
SuitCASE

Advanced Process & Case Management

Powerful Alignment of People, Process & Technology

Organizations that are process, case, file, application, claim or registration driven are traditionally faced with paper intensive processes and increasing demands on services that result in an ongoing need to review, adjust and re-align processes and people. A strengthened process and case management approach can reduce costs, reduce processing time, improve client service and increase capacity to plan and strategize for more effective service delivery systems. Case management is a collaborative process that assesses, plans, implements, coordinates, monitors, and evaluates the options and services required to meet an organization's service needs. It is characterized by communication and resource management and promotes quality and cost-effective interventions and outcomes. Case management facilitates the achievement of service objectives through assessment, planning, communication, education, resource management, and service facilitation. Along with a strengthened case management approach, a case management system solution to support business processing is needed to optimize an organization's potential.

WorkGroup Designs Inc. are specialists offering expertise in case management, organizational development, process re-engineering, change management, and offer SuitCASE as a comprehensive system solution to maximize an



Superior Workflow Capability

SuitCASE is event-driven workflow, document management and reporting all bundled together to provide an unprecedented case management tool for organizations. Its friendly user interface provides ease in a normally otherwise paper and administrative intensive business model.

Benefit from known best practices in case management through common components shipped with the solution and with unprecedented flexibility to address your unique business rules through a configuration engine – the engine can address 80% of any business process without any customization – we guarantee it!!!



“The achievements and improvements in case processing times are now within our grasp thanks to SuitCASE. This innovative technology automates case management processes while retaining the capacity to customize and personalize each step of our procedures.”

Business Benefits

Powerful Workflow Automation

- ✔ Workflow and business rules can be configured to meet both common and unique requirements of any organization without the need for extensive IT initiatives.
- ✔ Routes cases to different processes, and supports the activities, actions, events and approval cycles within each process allowing for both automated and manual procedures as specified by the business rules.
- ✔ Information is inherited from one stage to the next to prevent the duplication of effort in re-keying information.

Communication & Collaboration

- ✔ Exceptional communication and collaboration through automatic system messaging, e-mail, content management publishing to ensure that stakeholders in any process are well informed throughout the process.
- ✔ Built in capabilities to support team work, collaboration and information sharing.

Integrated Superior Document Management

- ✔ Facility to generate all documentation (templates, forms, reports) relating to case processing through integration with MS Word and the ability to set approval cycles, expected receipts and reminders associated with document generation.
- ✔ Facility to store scanned images or any digital format received from any source relating to case processing.

Decision-Making Support and Tools

- ✔ Tools to assist in planning and case coordination, facility to automate decision trees, and reduce human effort in processing routine outcomes based on business rules.
- ✔ Building a library of reference material (policies, procedures guidelines) and make references available in the course of processing matters.

Party Management

- ✔ Powerful contact, client and relationship management capabilities.
- ✔ Collect and store all contact information including contact information, contact types, relationship types and automate business rules associated with parties.

Comprehensive Reporting Capabilities

- ✔ Integrated with the industry-leading Business Intelligence tool, Crystal Enterprise Reporting.
- ✔ Real-time standard, customized and ad-hoc reporting to provide workload, trends analysis and performance reporting - made available at a click.

Automated Bring Forwards/Reminders

- ✔ Process stages can be automated, or reminders can be provided at milestones within the case process.
- ✔ An organization can force reminders to meet standards or users can set their own ticklers to remind them of key activities to be completed.

Planning/Scheduling/Calendar

- ✔ Facility to schedule meetings, plan tasks associated with a case, and manages personal and corporate calendars with ease.

Powerful Search Capabilities

- ✔ Search by case and keyword search is available throughout SuitCASE to access any case.
- ✔ Full text search is also provided through integration with the industry-leading COVEO Enterprise Search.

Friendly, Intuitive User Interface

- ✔ The user interface is logical, easy to navigate and provides user prompting to help ensure quality and consistency and to guide users through the processes. Delivers a common look and feel throughout.



“Our experience with WGD was unfailingly positive...WGD demonstrated versatility, responsiveness, competence and a ready ability to grasp both the big picture and the more subtle nuances of the client’s operational environment and challenges”.

Advanced Case Management

Presentation Layer

- ☑ Delivers an intuitive user interface to manage files/cases –a case/file in SuitCASE mirrors a physical file folder.
- ☑ Presents case view lists, reports, case, process, party profiles, case, process, status and document histories.
- ☑ Presents common and unique case and process level actions, activities, events.
- ☑ Personal and case calendars presenting all case activities.
- ☑ Powerful search capabilities.
- ☑ Users can set their own preferences for their welcome page.

Business Logic Layer

- ☑ The configuration engine in the business logic layer is powerful and allows an organization to set-up your business information, business rules and events, document templates, reference documents, activities, system screens, reports and set all access controls.
- ☑ Every word and every screen is completely configurable to make SuitCASE relevant to your unique business model.

Data Layer

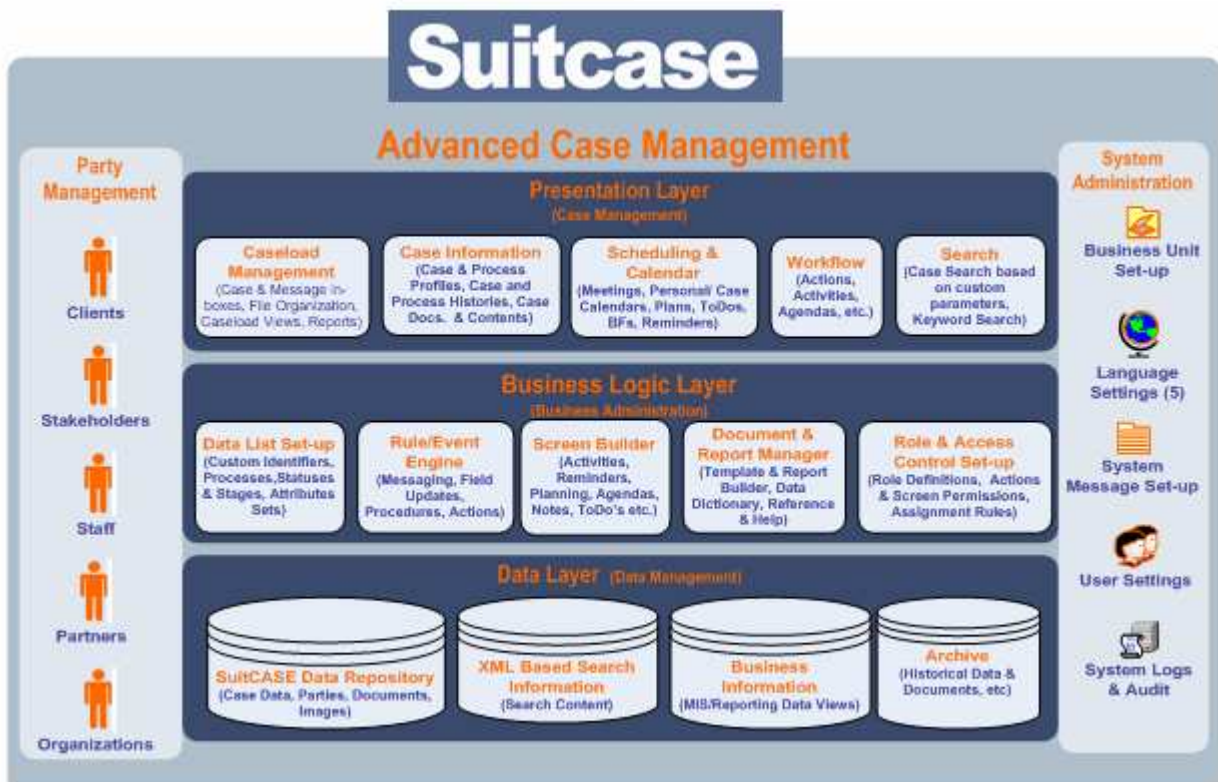
- ☑ The data layer stores all corporate data, documents, reports and images and well as archives of the same.
- ☑ The search capabilities are contained in the data layer to look-up all keywords or indices.
- ☑ The data layer also stores and processes case and corporate reporting.

Party Management

- ☑ Custom define what information on parties is required to suit an organization’s model.
- ☑ Set up the relationships between parties and organizations.

System Administration

- ☑ The system administration provides ease in setting up business units – in SuitCASE an organization can set up different business units that have completely different business processes.
- ☑ SuitCASE is multi-lingual allowing up to five languages.
- ☑ Set up of user ids and passwords.
- ☑ System logs, audit trail and system message set-up.



“WGD's SuitCase . . . allows the Law Society the flexibility to change processes when required...for example, to add paralegal regulation if the legislation comes to pass and to change technical platforms if necessary.”

The SuitCASE Welcome Page

WELCOME TO SUITCASE

You Have : **89 Assigned Cases** **0 New Transfers** **1 New Cases**
6 Approvals **3 Receipts** **29 New Messages**

MY CASES

Case #	Name	Assigned	Status
00018086	<input type="checkbox"/> Melissa Adams & Abe Greenbaum	Marnie Bro...	Open
00017981	<input type="checkbox"/> Jo-Anne Apple & Helen Wilcox	Marnie Bro...	Open
00017980	<input type="checkbox"/> Randy Kingsford & Saverpierre Smith	Sophie Pap...	Open
00017976	<input type="checkbox"/> Sub James & Ivana Hug	Bruce Duns...	Open
00017975	<input type="checkbox"/> Oscar Wallace & Karim Johnson	David Cass	Open

MY MESSAGES

Read	Message	Created	Created By
<input type="checkbox"/> YES	A s.49.3 Request for Instructi...	17/11/2005 12:23 PM	System Event
<input type="checkbox"/> YES	A draft case conference memora...	17/11/2005 12:28 PM	System Event
<input type="checkbox"/> YES	The Document titled Case Conf...	17/11/2005 12:29 PM	Rainone, Lori

Case Folder View

- Activities
- Notes
- Issues
- ToDo's
- Plans
- Meetings
- Documents
- Parties
- Receipts
- Reminders/BFs
- Agendas
- History

Case# 00017924- Jesse Johns & Bresan, Larry

Intake Investigation PAC

Activities | Notes | Issues | To Do's | Plans | Meetings | Documents | Parties | Receipts | BF/Reminders | Agendas | History

The Welcome Page always provides the user with their case listing, their messages, new cases etc.

The case is organized by folders representing different processes a case may go through, and each folder has common case objects listed above.

Technology Benefits

- Web/Browser Based (Internet Explorer).
- J2EE platform – open standards.
- Powerful integration capabilities – because of its open standards architecture, SuitCASE acts as a strong integrator with other databases/systems.
- Integrated with MS Word and Adobe PDF Smart forms.
- Ease in administration.
- Powerful security architecture.

Technology Requirements

Recommended Hardware & Software Requirements

- iSeries or Windows 2003 Server
- Microsoft Word 2000 or 2003
- WebSphere Application Server v6.1 or JBOSS Application Server
- Microsoft Internet Explorer 6.0
- Crystal Enterprise Server v10
- Coveo Enterprise Search v3.5 or above (optional)
- IBM DB2 or MS SQL Server

Complementary Add-On Solutions

ScanMail

Provides a facility to e-mail attachments of any digital format (letters, applications, scanned images) directly into a case. Also provides a distinct web-based interface for caseload management and workflow for errant submissions.

Time & Billing

Facility for time based and activity based costing. Authorized users may register time and/or activities against a case using predetermined rates/costs thereby providing management with valuable costing data. Client billing can be facilitated through the set-up of client invoice frameworks.

Gateway

A facility to provide PDF form integration, API Interfaces and a separate SuitCASE web-based portal with a full content management facility.

Client Relationship Management Module

A SuitCASE facility beyond party management which provides traditional CRM facilities including contact grouping, bulk e-mailing, relationship tracking and campaign management.



“It is rare to find this combination of awareness of policy development, knowledge of programs and an understanding of information technology in one company. Indeed, this Branch has dealt with many consultants over the past four years on projects of this kind, and none came close to matching the quality of WGD’s work.”

The SuitCASE Value Proposition

SuitCASE offers any organization unprecedented value:

- ☑ A complete solution without the excessive costs of customization – the SuitCASE engine can address more than 80% of any business model.
- ☑ SuitCASE handles all common components of a case management approach – workflow, document management, contact party management, collaboration, and comprehensive reporting.
- ☑ A SuitCASE client benefits from a case management solution modeled based on best practices learned from years of experience in case/file/application/claim driven organizations.
- ☑ With business requirements defined, a process can be configured and prototyped within a couple of days, no matter the complexity and unique characteristics of an organization.
- ☑ SuitCASE puts the management of business rules, information needs, document management, access control into the hands of the business – an advanced user can manage the business administration (business logic) layer of SuitCASE.
- ☑ SuitCASE is highly flexible to address changing and evolving business rules without the expense of ongoing IT initiatives to address
- ☑ SuitCASE can be deployed across multiple business units and be configured to handle varying processes and different data models within an organization.

Process / Case Management Business Expertise

WGD are experts in Process and Case Management from both the business process and system solution perspectives. We have provided numerous organizations with value-added solutions that have resulted in sustainable, measurable business improvements. WGD can assist an organization in reviewing their processes, defining their business requirements, and assisting in business process re-engineering or change management.

For a free demonstration of SuitCASE or more information, please contact:

WorkGroup Designs

8000 Jane Street, Suite 204, Concord ON, Canada L4K 5B8
477 Queen Street, Suite 202, Sault Ste. Marie, ON Canada 6A 1Z5
Phone: 905-761-9491 Fax: 905-761-7681

www.wgdi.net

The distinction of WGD is that we guarantee that the quality of our services and products will undoubtedly exceed your expectations – we don’t believe in only restating what our clients already know – we ensure that in every assignment we add value, and complete each assignment on time, within budget, providing the client with value that leads to sustainable results....exceeding by design!

