DecisionPoint 3

Case Manager User & Reference Guide

veda
applied intelligence

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1 Case Manager Overview

Case Manager Overview - Section Objectives

By the end of this section you will be able to:

1. Understand the purpose of Case Manager
2. Understand the key areas of the Case Manager screen
3. Navigate Case Manager
4. Understand what actions can be performed in Case Manager

1.1 Introduction

The purpose of this User Guide is to enable you to use **Case Manager** to:

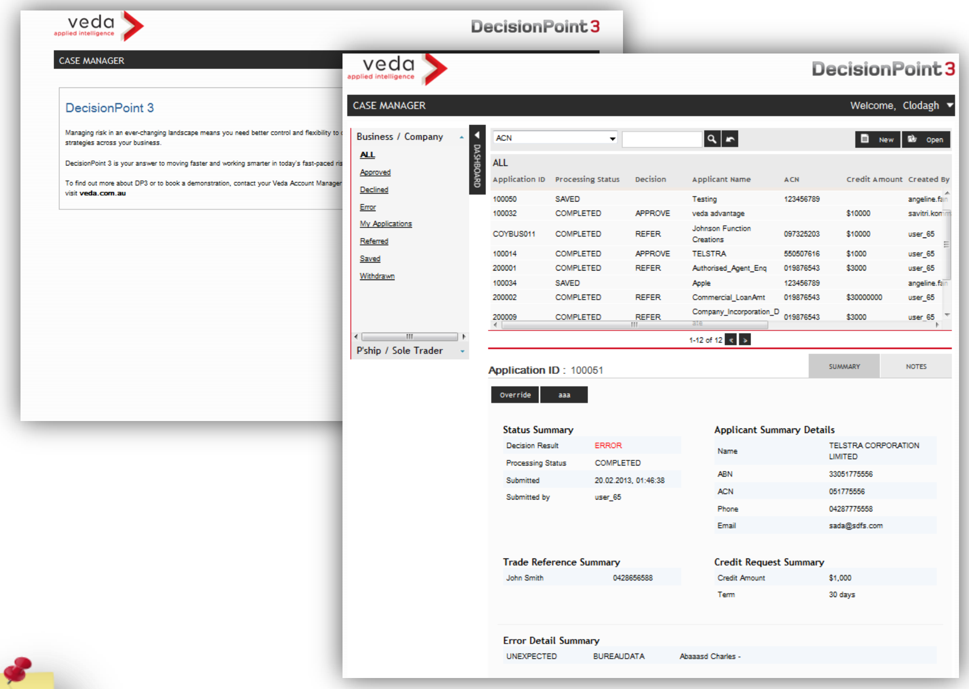
- Perform actions against credit applications
- Review credit application summary information
- View Credit Bureau Reports

1.2 What is Case Manager?

Case Manager is an end user tool allowing the business to manage and review existing credit applications and apply actions to those applications, such as: adding notes; making credit decisions; or reviewing credit reports. Case Manager has customisable actions and summary views, ensuring it is user-friendly in line with the specific business needs and providing a clear overview of all applications.

Case Manager is used to:

- Search for credit applications
- Review summary information for existing credit applications
- View credit bureau reports
- Create new customer credit applications
- Add notes to credit applications
- Open and edit an existing credit application
- Perform user-defined functions against credit applications



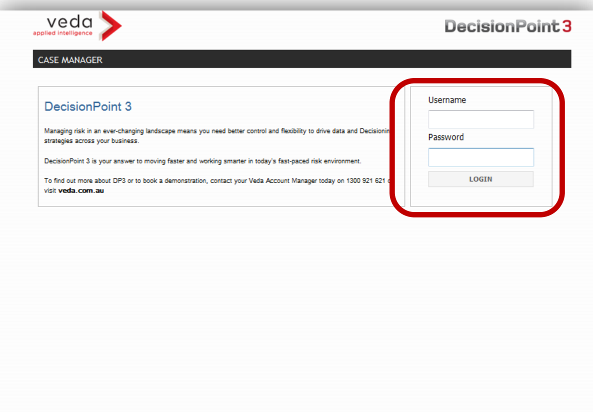
Note:
The ability for the user to see all or only some portfolios, as well as access some functionality in Case Manager is defined by the business in the Case Manager Management Console.

1.3 Logging In to Case Manager

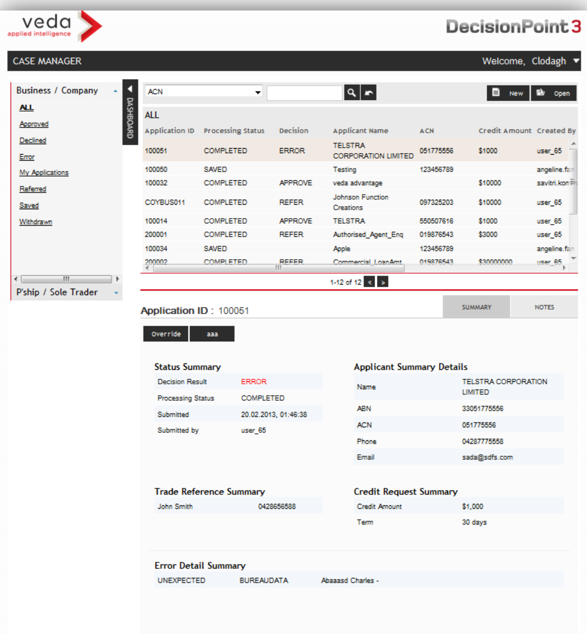
Case Manager can be accessed from a shortcut on the desktop, the system tray or from the Start Programs List.

Log in to Case Manager (from the Start Programs list):

1. Open **Case Manager**
2. The Case Manager Login splash screen will appear.
5. Enter your **User Name**
6. Enter your **Password**
7. Click **Login**.

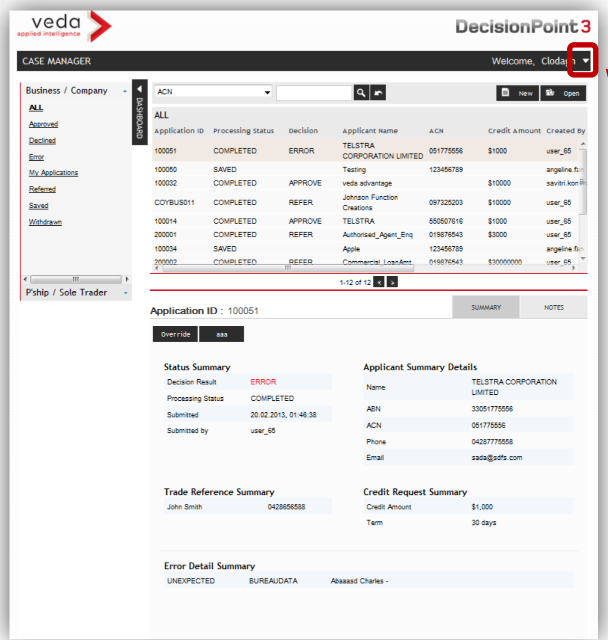


8. **Case Manager** will open.



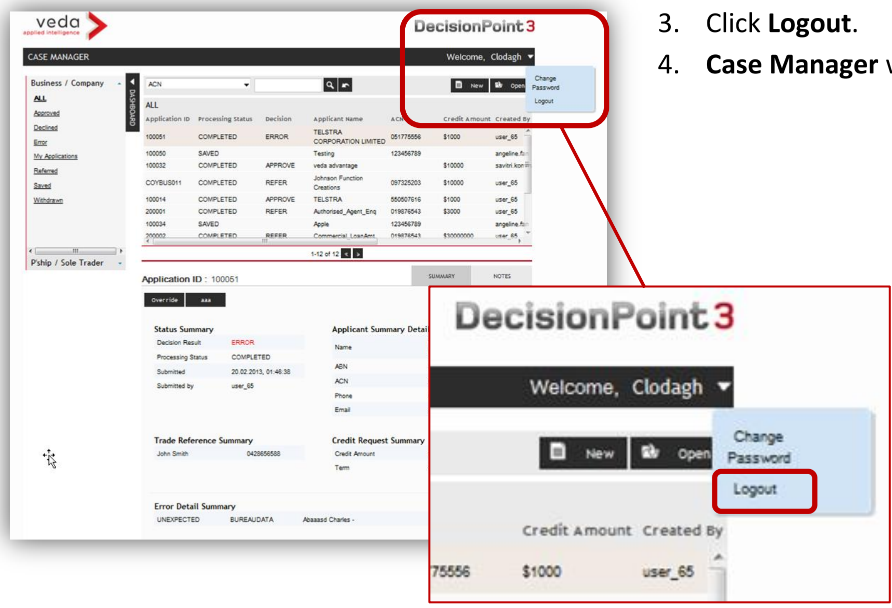
1.4 Logging Out of Case Manager

The user can log out of Case Manager either by clicking on the red cross in the top right-hand corner or via the menu under the username.



To log out of Case Manager via the username menu:

1. Click on the **down arrow** next to the username

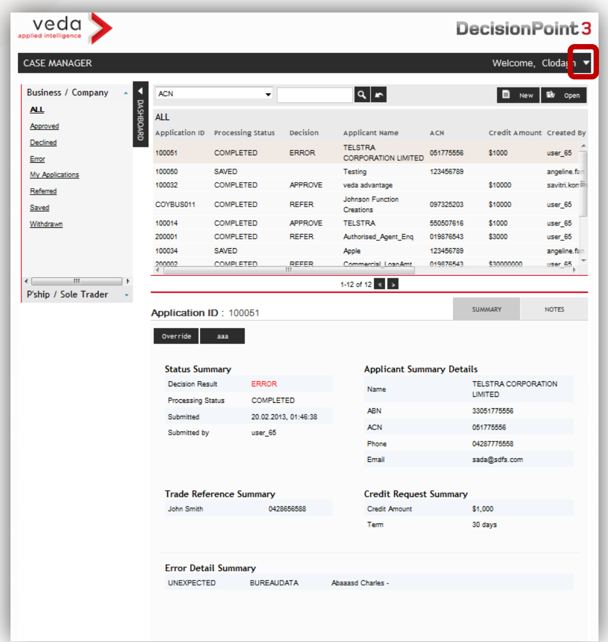


2. A menu will appear.
3. Click **Logout**.
4. **Case Manager** will close.

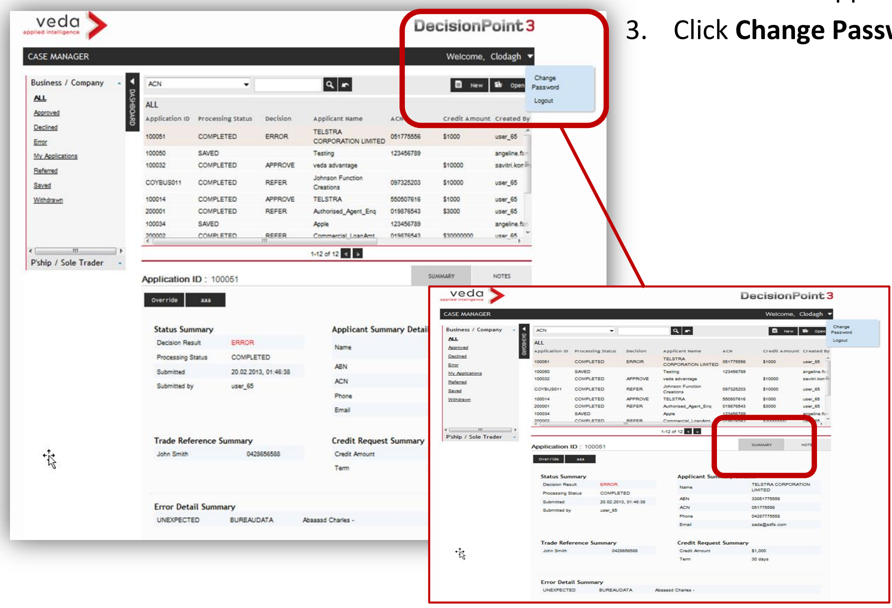
1.5 Changing your Password

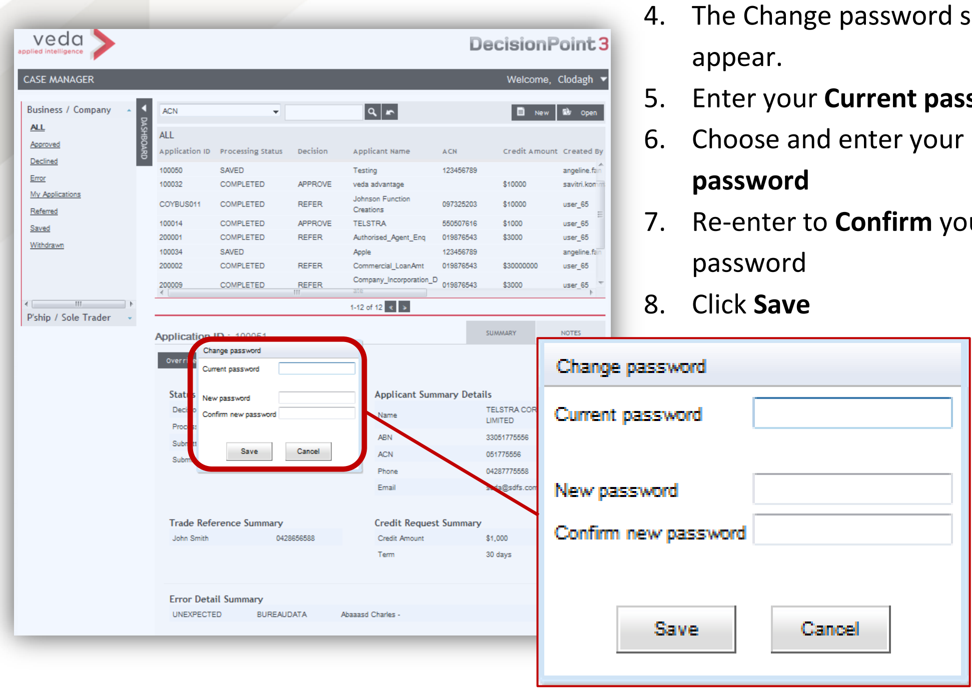
To change your password:

1. Click on the **down arrow** next to the username

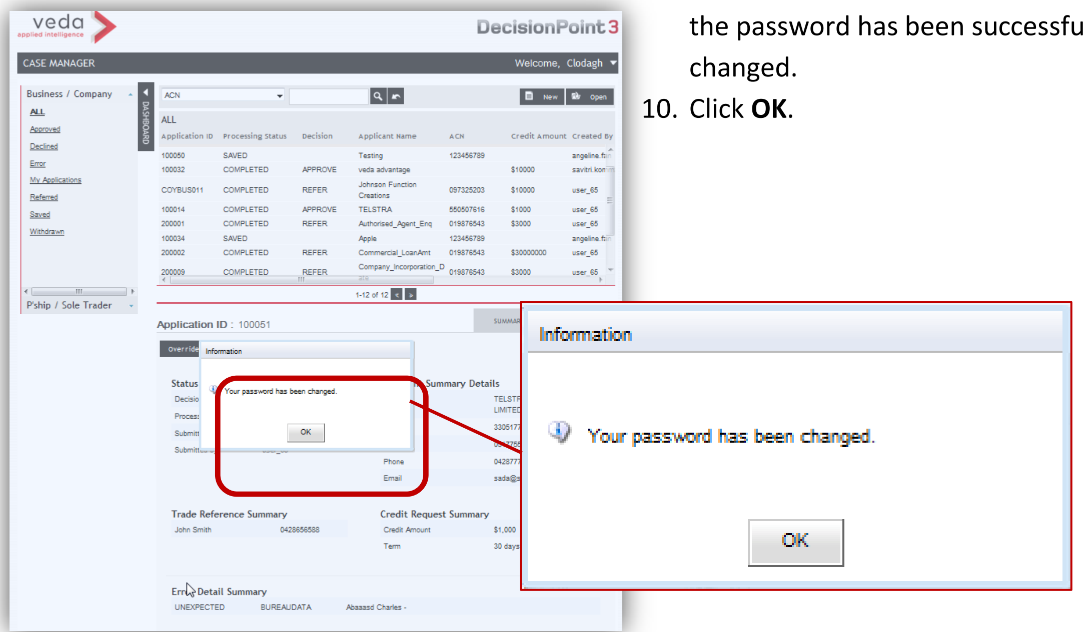


2. A menu will appear.
3. Click **Change Password**.





4. The Change password screen will appear.
5. Enter your **Current password**
6. Choose and enter your **New password**
7. Re-enter to **Confirm** your New password
8. Click **Save**



9. A message will appear to indicate the password has been successfully changed.
10. Click **OK**.

1.6 Navigating the Case Manager

Case Manager has a user friendly interface which provides an at a glance view of all information the user needs to see in one screen.

The key areas of **Case Manager** are:

- **Dashboard**
- **Applications List**
- **Application Details**

The working areas of Case Manager are shown in Figure 1:

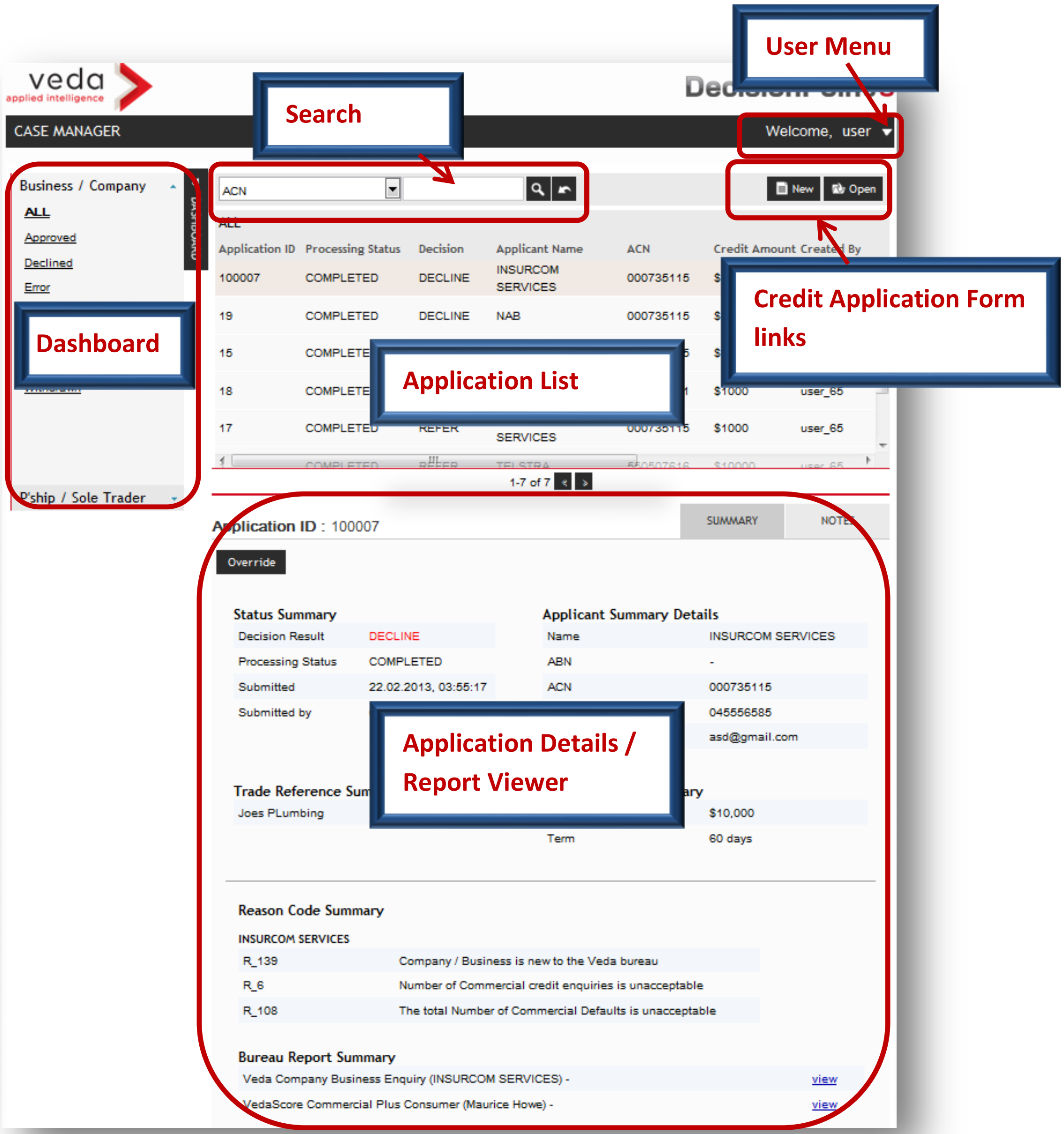
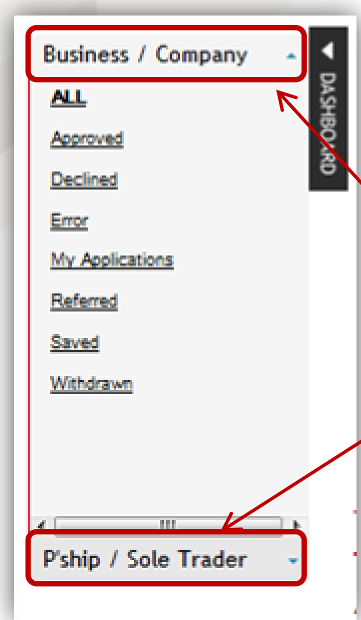


Figure 1: Case Manager Screen

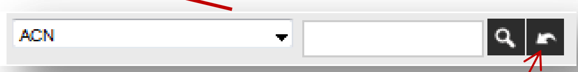


Dashboard – The Dashboard enables the user to switch between the Business portfolios and filter down applications in the Application List. The links in the Dashboard are configured by the business in line with their portfolio

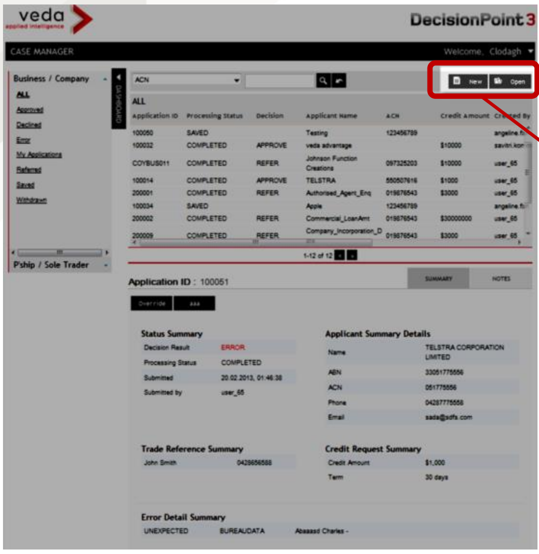
The section names within the Dashboard represent the Business portfolios.

Handy Hint:
The user can choose to hide the Dashboard from view by clicking on the word Dashboard. Reveal the Dashboard by clicking Dashboard again.

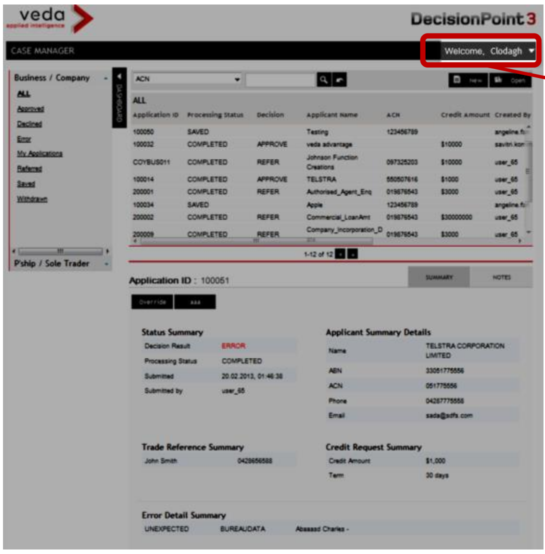
Search and Refresh– This allows the user to select the criteria from the drop-down box which they want to search on and then enter data into the box next to it to locate the required application.



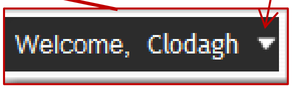
The back arrow icon allows the user to **refresh** the application list. This is required to see changes after a new application has been made or an existing application has been updated.



Credit Application Form links – These buttons open the Credit Application screen where users can create new applications or update existing applications.

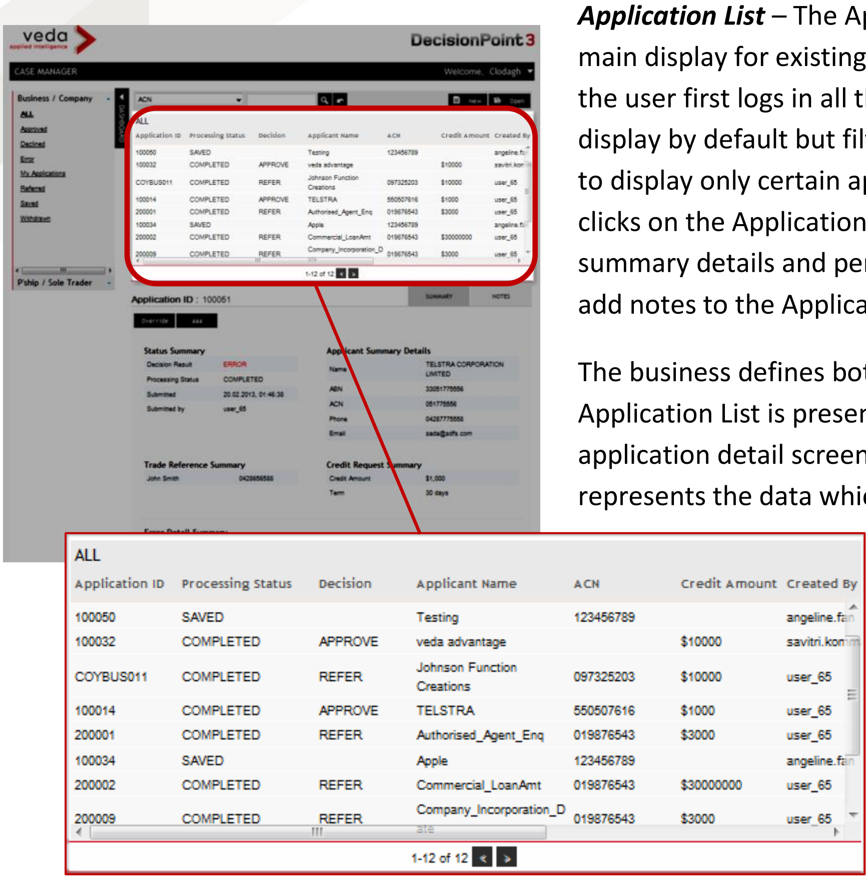


User menu– This drop-down menu allows the user to Log Out and Change their password.



Application List – The Application List is the main display for existing applications. When the user first logs in all the applications will display by default but filters can be applied to display only certain applications. The user clicks on the Application here to see summary details and perform actions like add notes to the Application.

The business defines both how the Application List is presented and how the application detail screen (see below) represents the data which is shown here.


ALL

Application ID	Processing Status	Decision	Applicant Name	ACN	Credit Amount	Created By
100050	SAVED		Testing	123456789		angeline.fa
100032	COMPLETED	APPROVE	veda advantage		$10000	savitri.kon
COYBUS011	COMPLETED	REFER	Johnson Function Creations	097325203	$10000	user_65
100014	COMPLETED	APPROVE	TELSTRA	550507616	$1000	user_65
200001	COMPLETED	REFER	Authorised_Agent_Enq	019876543	$3000	user_65
100034	SAVED		Apple	123456789		angeline.fa
200002	COMPLETED	REFER	Commercial_LoanAmt	019876543	$30000000	user_65
200009	COMPLETED	REFER	Company_Incorporation_Date	019876543	$3000	user_65

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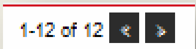
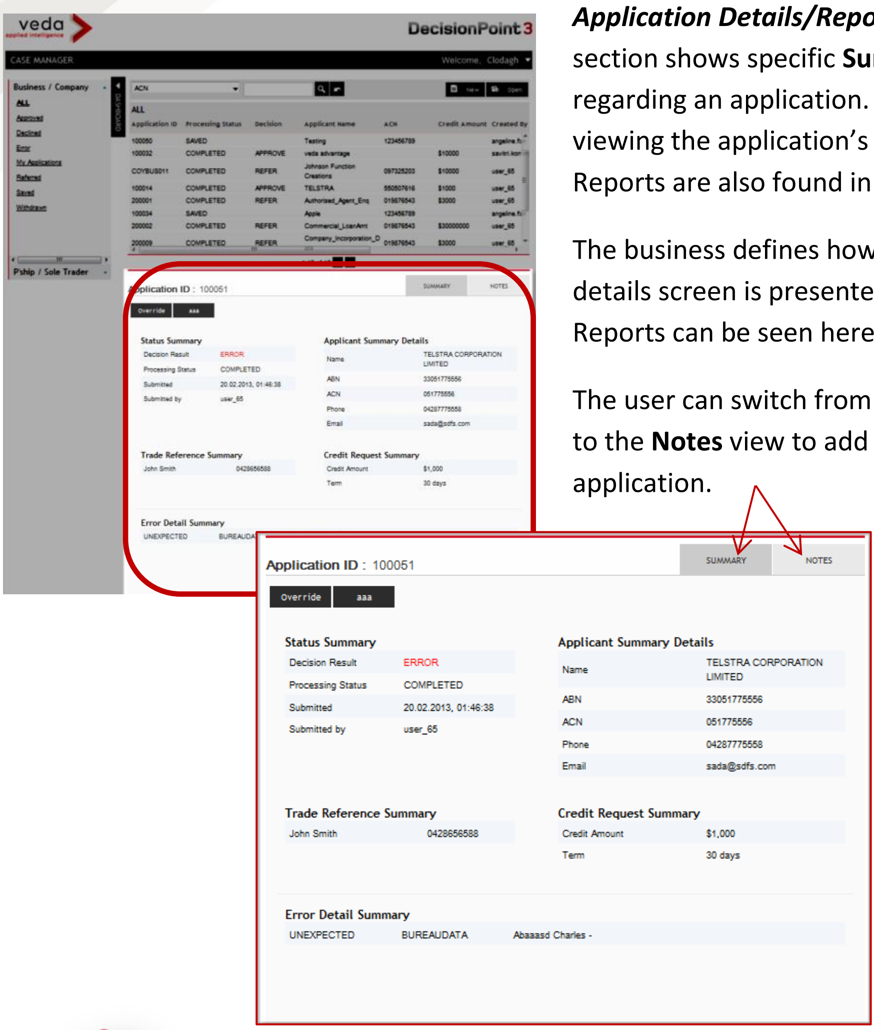
Note:
Use the scroll bars to scroll through all the applications in the list. If there is more than one page of applications the user can use the back and forward arrows to navigate between the pages.



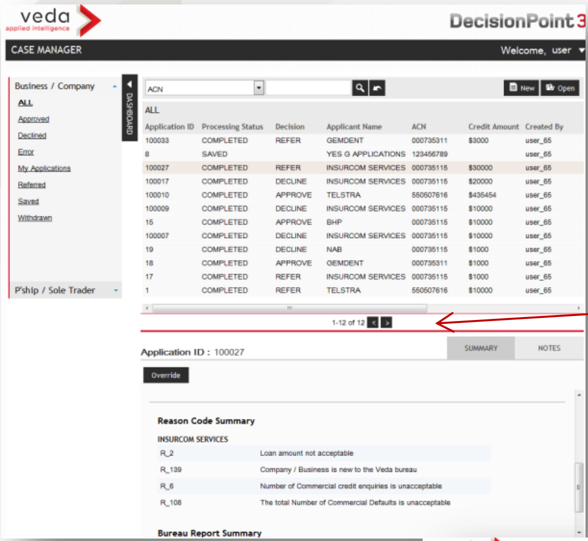


Application Details/Report Viewer– This section shows specific **Summary** details regarding an application. The links to viewing the application's Credit Bureau Reports are also found in this section.

The business defines how the application details screen is presented as well as what Reports can be seen here.

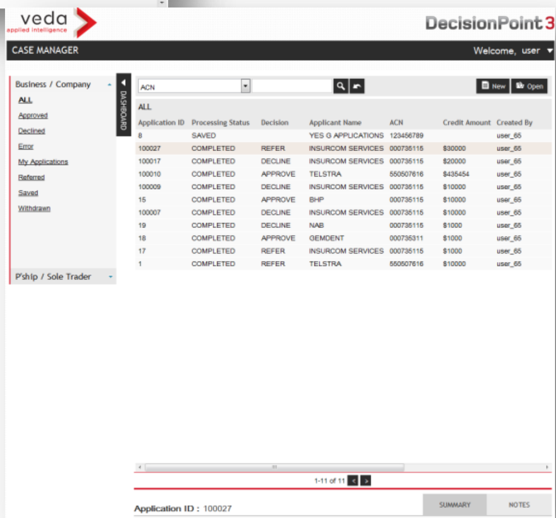
The user can switch from the **Summary** view to the **Notes** view to add notes to an application.

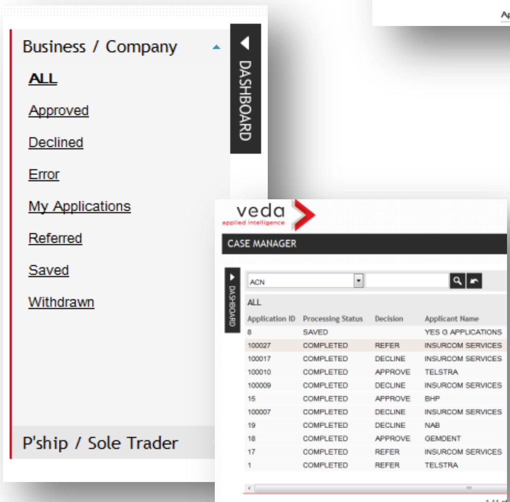
Note:
Additional buttons which allow the user to perform specific actions against applications may be available at the top of the Application Details screen. However, this is dependent on what the business has configured.



Adjusting the Case Manager screen – The user can maximise and minimise the sections highlighted in the diagram. This allows maximum visibility of whatever the user requires.

Simply drag up or down the thick red line which runs across the centre of the Case Manager screen. This allows the user maximum visibility of the Application List or Application Details section as required.





The Dashboard can also be collapsed and re-instated as required by clicking on the word Dashboard.

Now that you have a good understanding of the different areas of the Case Manager screen, let's look at what actions can be performed in Case Manager.

Case Manager Overview - Section Summary

Key points covered in this section are:

- ☑ **Case Manager is an end user tool allowing the business to manage and review existing credit applications and apply actions to those applications, such as: adding notes; making credit decisions; or reviewing credit reports.**

- ☑ **The Case Manager screen comprises the following key working areas:**

  - **Dashboard**
  - **Search and Refresh**
  - **User Menu**
  - **Credit Application Form links**
  - **Application List**
  - **Application Details and Report Viewer**

- ☑ **Case Manager provides the user with an at-a- glance view of everything they need to see on an application and how to navigate between applications. Case Manager has a single screen from which all applications can be viewed and tasks can be performed.**

- ☑ **The user can search and filter the applications which are displayed, review application details, add notes to applications, link to the Credit Application form to create new and update existing applications and more.**

2 Using Case Manager

Section Objectives

By the end of this section you will be able to:

1. Search for and view credit applications
2. Edit applications
3. Apply notes to credit applications
4. Create new credit applications
5. Open an existing credit application
6. Use User-Defined functions
7. Refresh the application details
8. View and Save Credit Bureau Reports

Using Case Manager

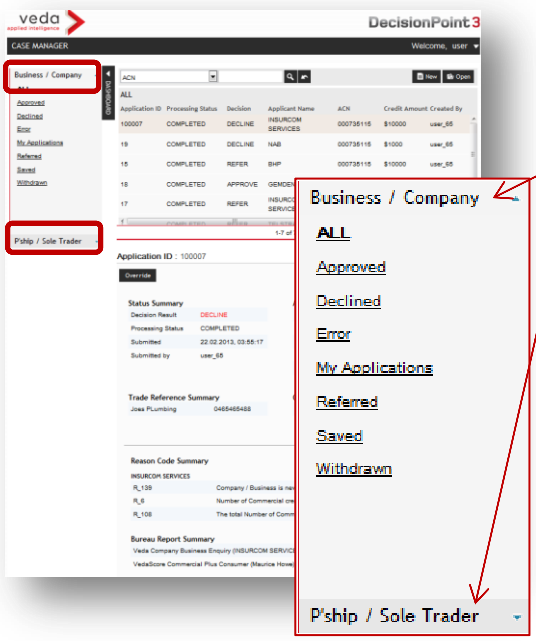
This section covers the following actions which can be performed in Case Manager:

- Navigating between portfolios
- Searching for a credit application
- Viewing an application summary
- Adding notes to an application
- Using User-defined buttons
- Creating a new credit application
- Opening an existing credit application
- Refresh applications
- View Credit Bureau Reports
- Saving a Credit Bureau Report

Further actions can be configured by the business as required.

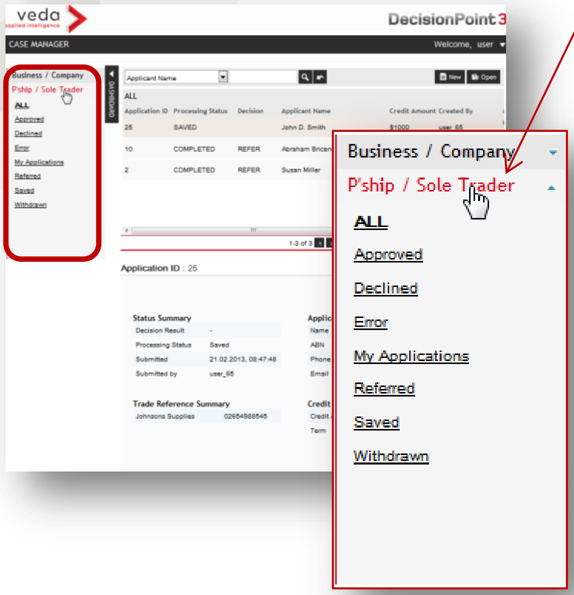
2.1 Navigating between portfolios

The user can navigate between the various portfolios which have been configured for Case Manager. The business chooses the portfolios and how applications are filtered in Case Manager.



To navigate between portfolios:

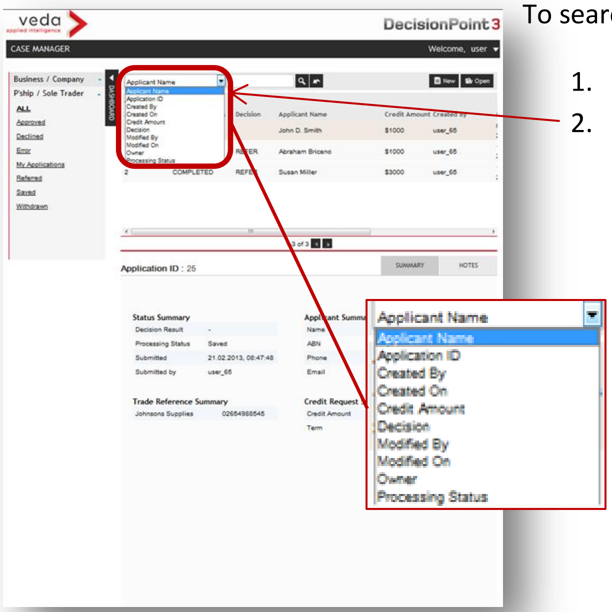
1. Log in to Case Manager
2. The portfolios are listed in the dashboard on the left-hand side of the screen



3. Click on the name of the portfolio you want to see.
4. The filter options for the portfolio will appear and the applications associated with the portfolio will be listed in the application list section.

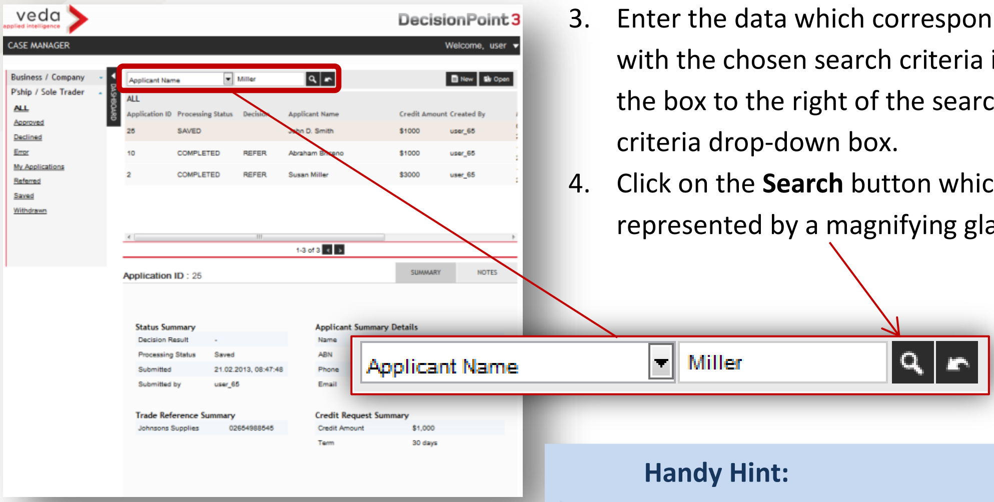
2.2 Search for a credit application

The user can search for specific credit applications based on a number of criteria options. The business chooses the search criteria which is presented in Case Manager.



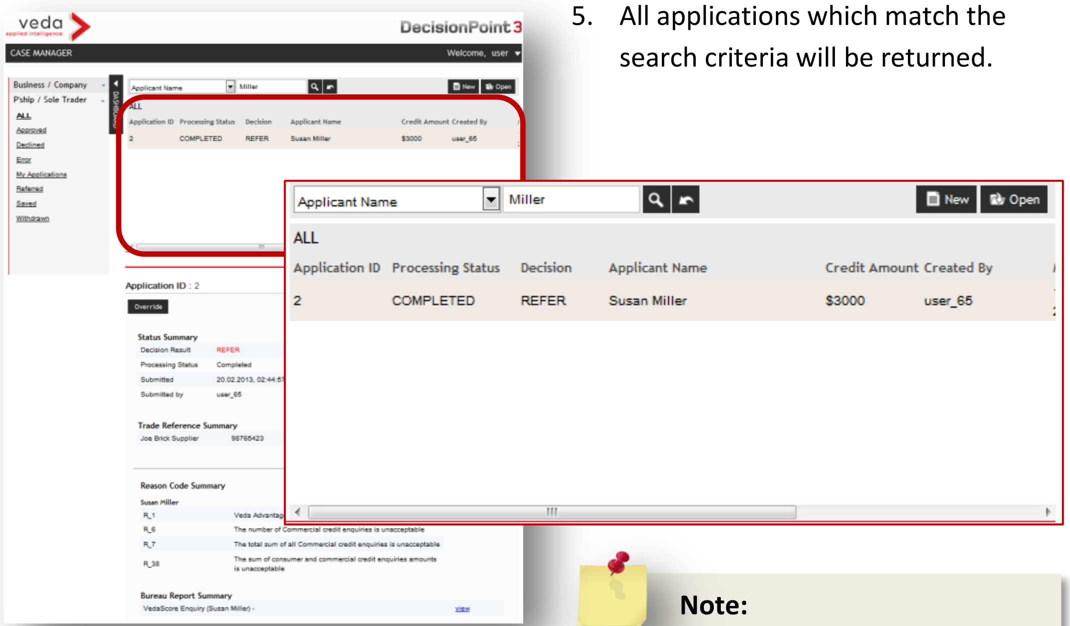
To search for a credit application:

1. Log in to Case Manager
2. Select the criteria on which you want to search for the application from the drop-down box. The business defines the criteria which is set here.



3. Enter the data which corresponds with the chosen search criteria in the box to the right of the search criteria drop-down box.
4. Click on the **Search** button which is represented by a magnifying glass.

Handy Hint:
Partial data can be entered in the Search box. For example, if an M is entered against the applicant name then any applications with an M in the name will be returned.

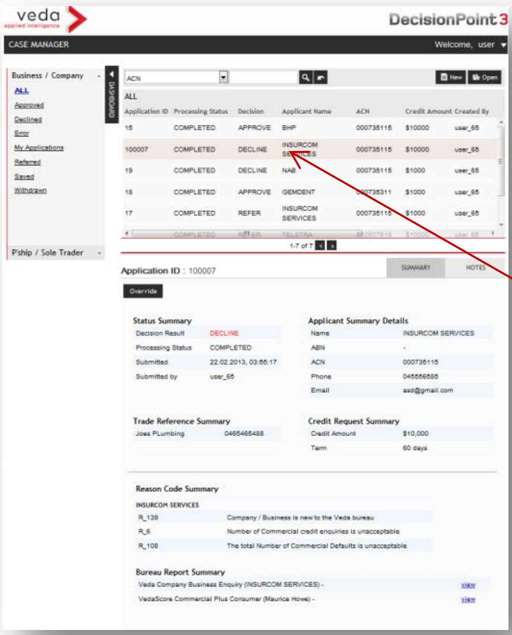


5. All applications which match the search criteria will be returned.

Note:
The Search is performed only against applications within the selected portfolio

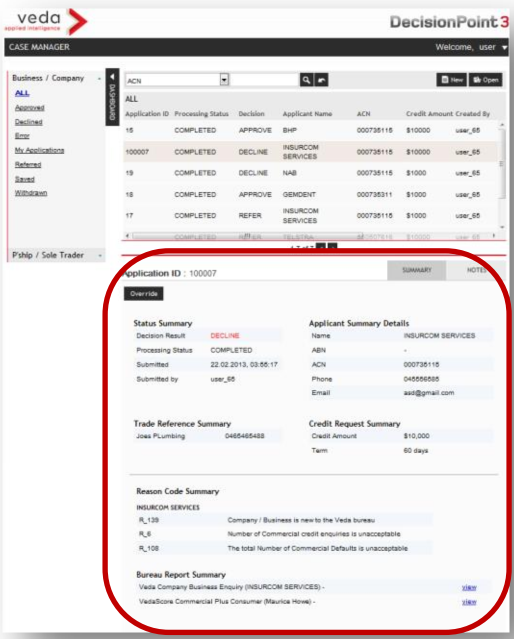
2.3 View Application Summary

The Application Summary is shown in the lower part of the Case Manager screen. The headings and content of the summary is decided and configured by the business.

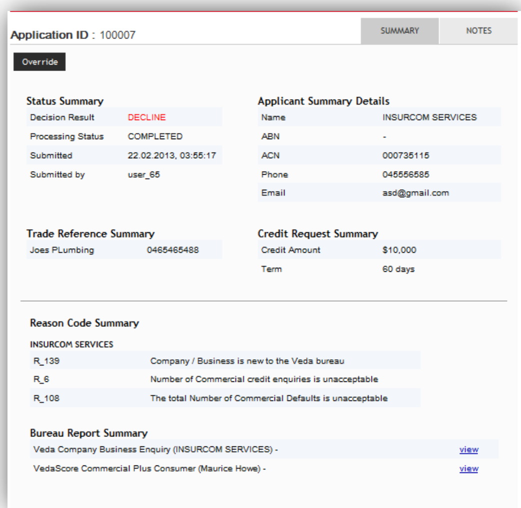


To navigate between portfolios:

1. Log in to Case Manager
2. Search for the application you want to view. If the required application is the only result returned then the summary will automatically display, otherwise:
3. Click on the Application in the Application List

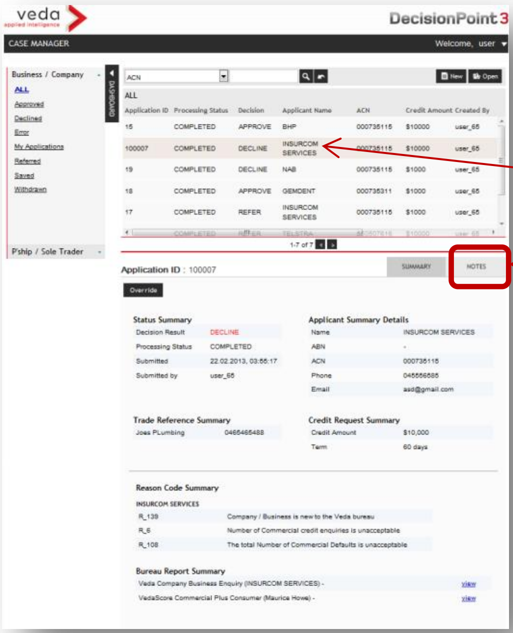


4. The Application Summary will show in the Application Details pane in the lower half of the screen.



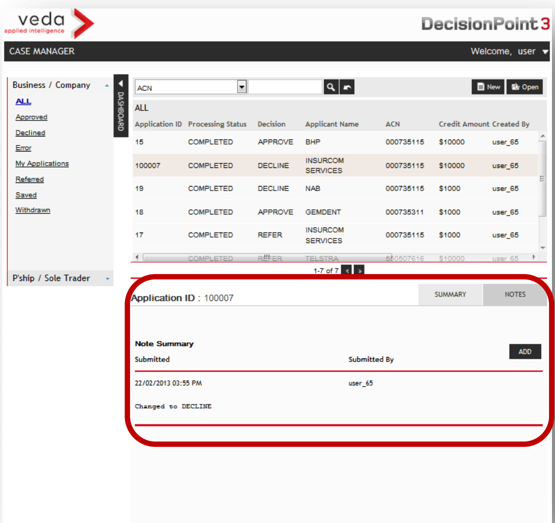
2.4 Viewing and Adding Notes to a credit application

The user can add notes to credit applications and see any notes which were previously added. These are added from the Application Details section of the screen. The user simply clicks on the Notes tab to open the Notes Summary and view and add notes.

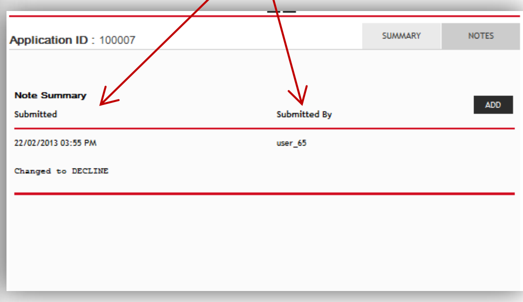


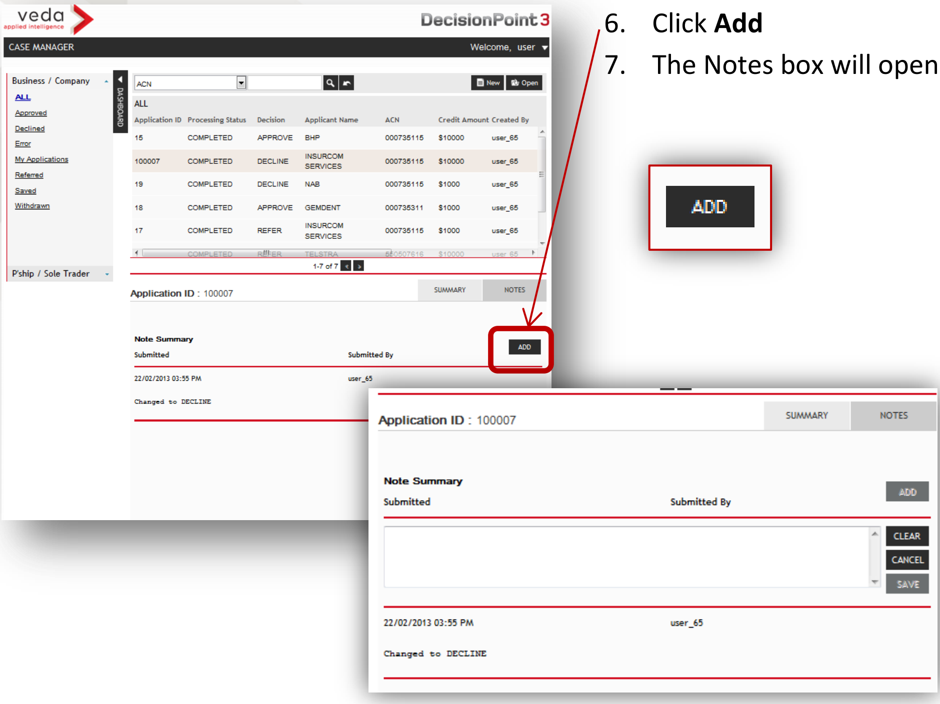
To navigate between portfolios:

1. Log in to Case Manager
2. Search for the application you want to view.
3. Click on the Application in the Application List
4. Click on Notes in the Application Details pane

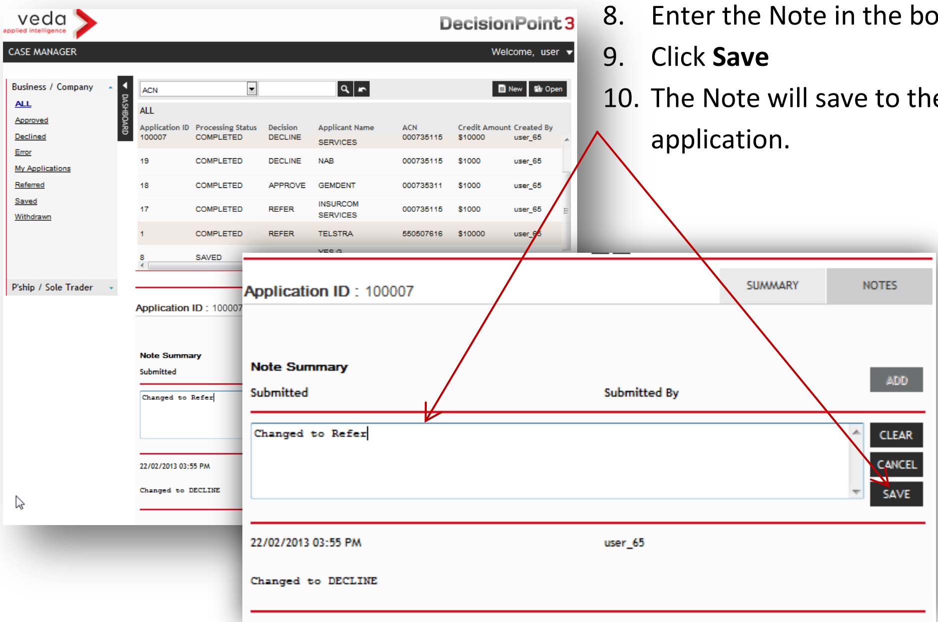


5. The **Notes Summary** will open. Any Notes which have previously been added to the application will display. The date the note was written and the user who wrote the note will also display.



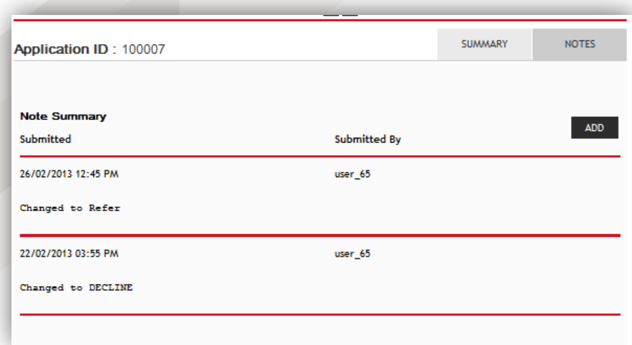


6. Click **Add**
7. The Notes box will open.



8. Enter the Note in the box.
9. Click **Save**
10. The Note will save to the application.

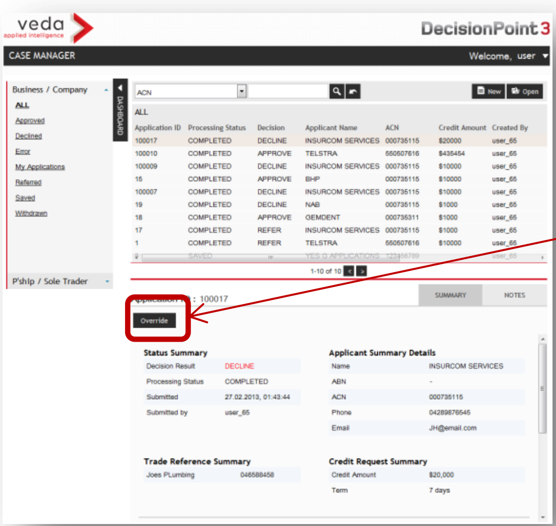
Note:
The user can also clear the note they have written and cancel the note if required.



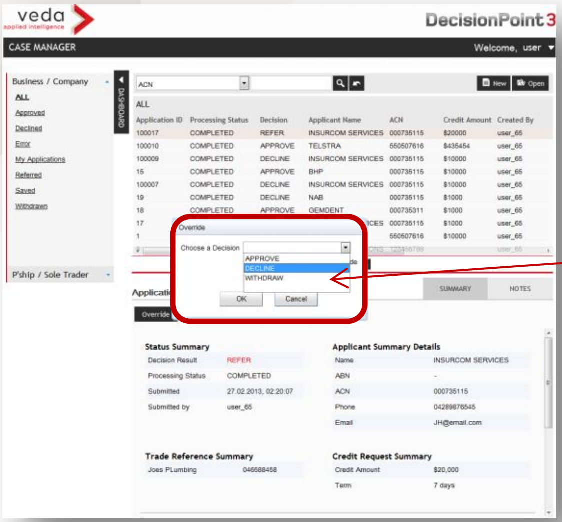
11. The Note will be shown as the most recent in a list of notes applied to the application.

2.5 Using User-Defined buttons

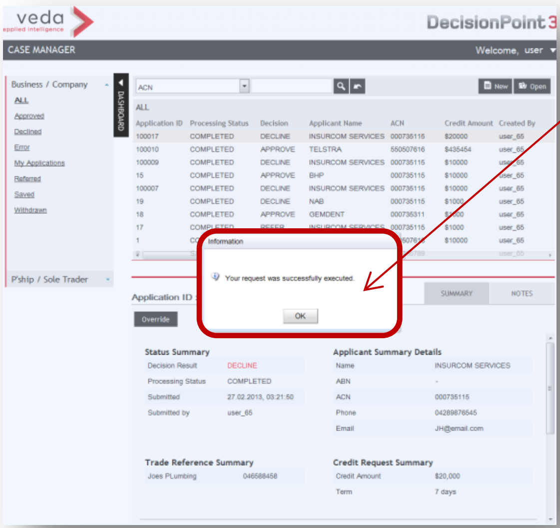
The business can define their own actions to be applied against applications. These actions will allow the user to modify data on Completed applications. They are then displayed under buttons in the application details section of the Case Manager screen. An example of a user defined button is the Override button which is shown in the following example.



1. Log in to Case Manager
2. Search for the application you want to modify.
3. Click on the Application in the Application List
4. User-defined buttons are located at the top of the Application Details screen. Click on the User-Defined Button.



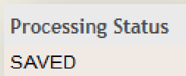
5. A pop-up screen will open allowing the user to enter any data required to modify the application.
6. Enter the data or choose the relevant option from the drop-down box.
7. Click **OK**.



8. A message will appear to confirm the action was completed.
9. Click **OK**.

Note:

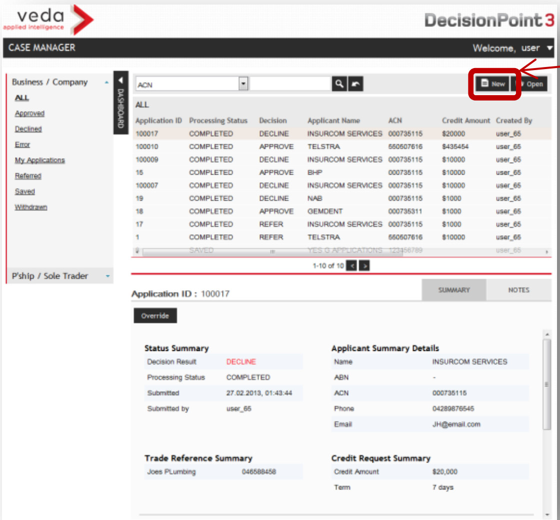
It is only possible to perform user defined functions against applications which have a processing status of COMPLETED. The User Defined Function buttons will not display for any applications which have a processing status of SAVED.



2.6 Create a New credit application

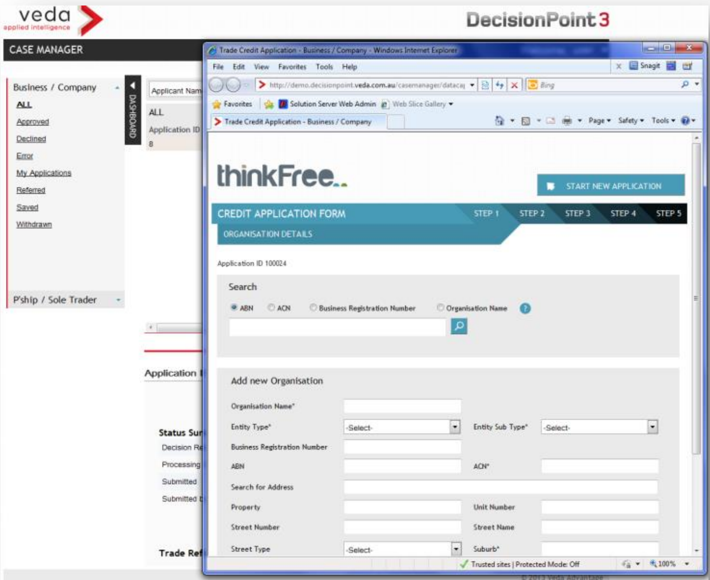
Case Manager contains a link to the Credit Application form which allows users to create new credit applications.

To create a new credit application:



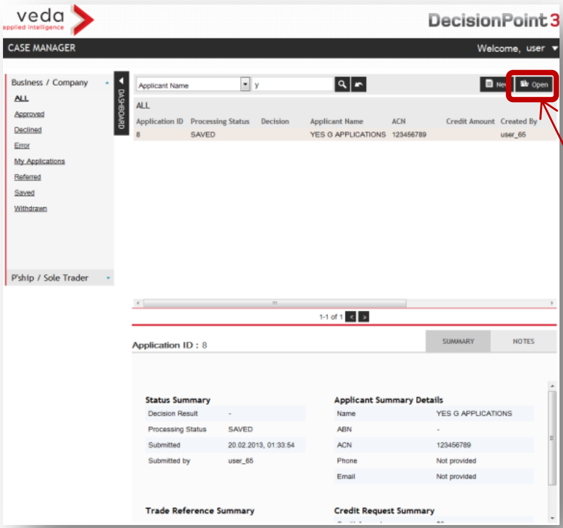
1. Log in to Case Manager
2. Click **New** in the top right hand corner of the screen.

3. The **Credit Application Form** will open in a new window. You can now create a new application



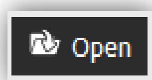
2.7 Open an existing credit application

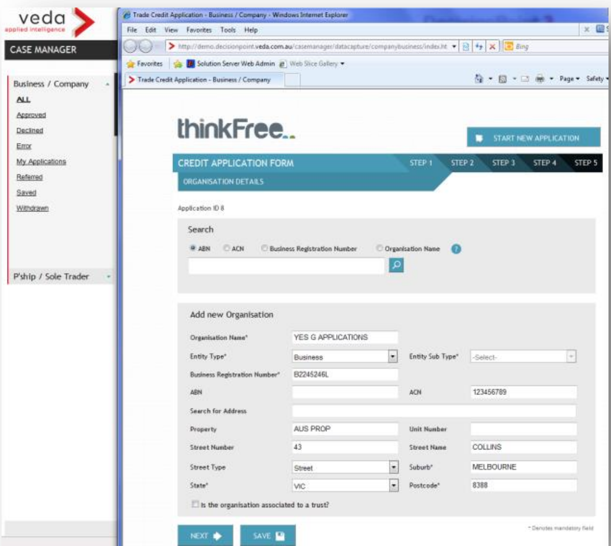
Case Manager contains a link to the Credit Application form which allows users to open and edit an existing credit application.



To open an existing credit application:

1. [Log in](#) to Case Manager
2. [Search](#) for the application you want to edit.
3. Click on the Application in the Application List.
4. Click **Open** in the top right hand corner of the screen.



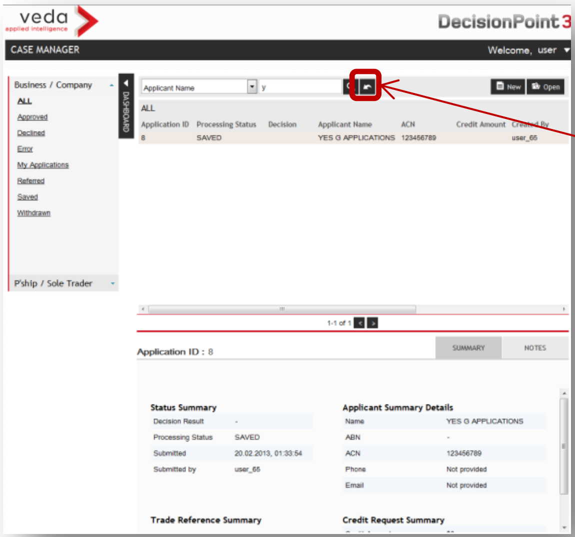


5. The **Credit Application Form** will open in a new window. The details of the highlighted application in Case Manager will be populated in the Credit Application Form screen. You can now edit the application details

Note:
To see any changes that have been made to the application once it has been edited, the user must refresh the screen to see the updated information.

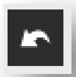
2.8 Refresh Results

Case Manager must be refreshed to see any updated application information.



To refresh the Application List:

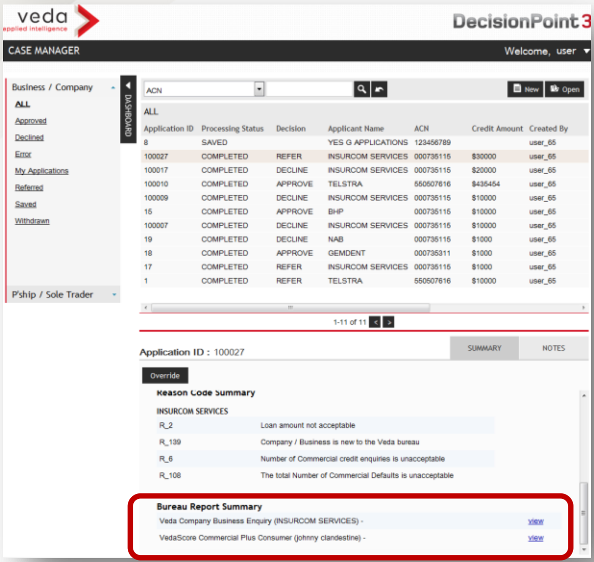
1. Log in to Case Manager
2. Search and edit applications as required
3. Click **Refresh**
4. The application details will refresh and any changes recently made can be seen in the application.



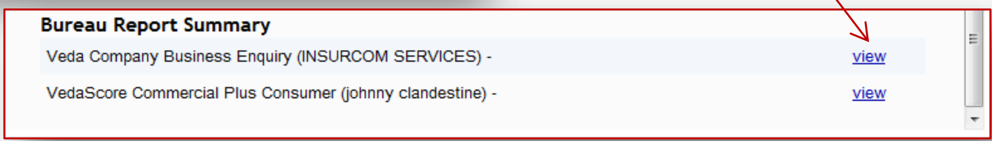
2.9 View Credit Bureau Reports

Credit Bureau Reports are available to view once the user has submitted an application to the bureau to retrieve information relevant to an applicant. The credit bureau reports will have the usual Veda Check report format. Credit Bureau Reports can be viewed in the application details section of the screen within the Summary.

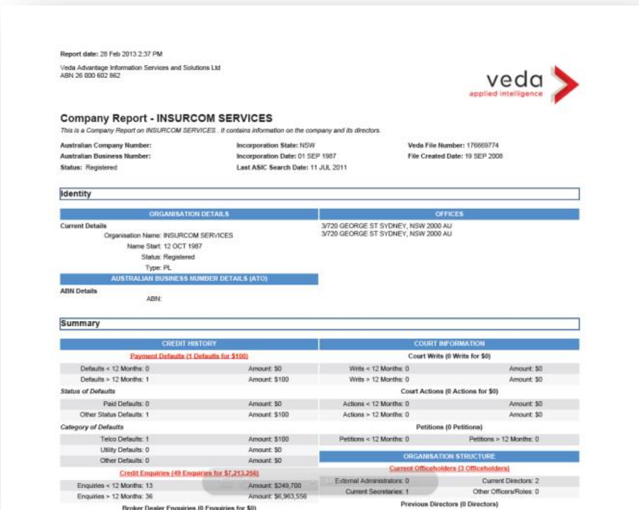
To view Credit Bureau Reports for an application:



1. Log in to Case Manager
2. Search for the application you want to view.
3. Click on the Application in the Application List
4. The Application Details section Summary will contain a link for each credit bureau report which has been retrieved for the application.



5. Click on the link for the Credit Bureau Report you want to view. The Report will open in a new window.

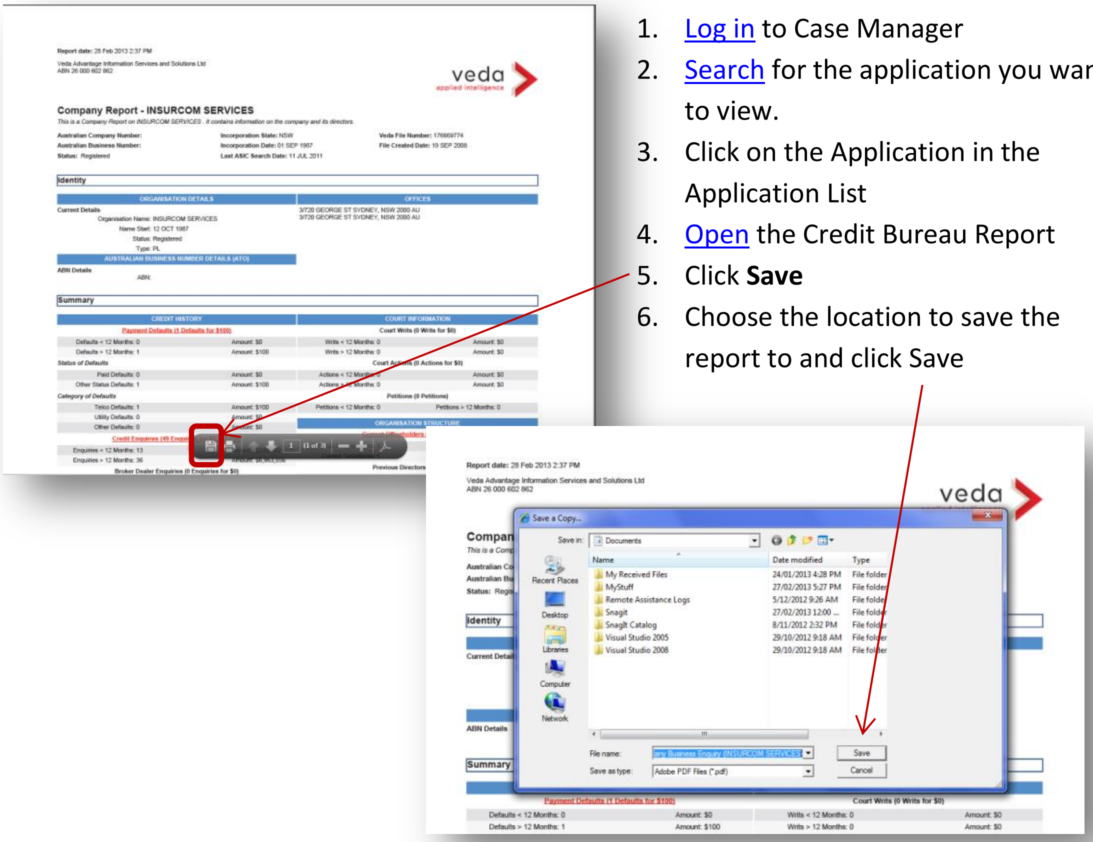


2.9.1 Save a credit bureau report

The Credit Bureau Reports are opened as PDF files and can be saved locally.

To save a Credit Bureau Report:

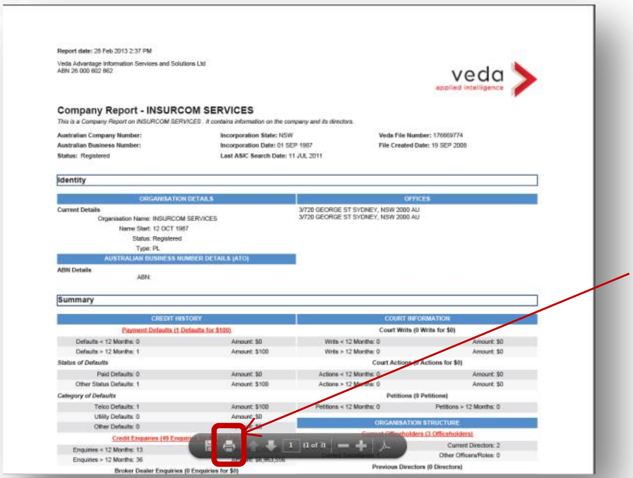
1. Log in to Case Manager
2. Search for the application you want to view.
3. Click on the Application in the Application List
4. Open the Credit Bureau Report
5. Click **Save**
6. Choose the location to save the report to and click Save



2.9.2 Print a credit bureau report

The Credit Bureau Reports are opened as PDF files and can be printed.

To print a Credit Bureau Report:

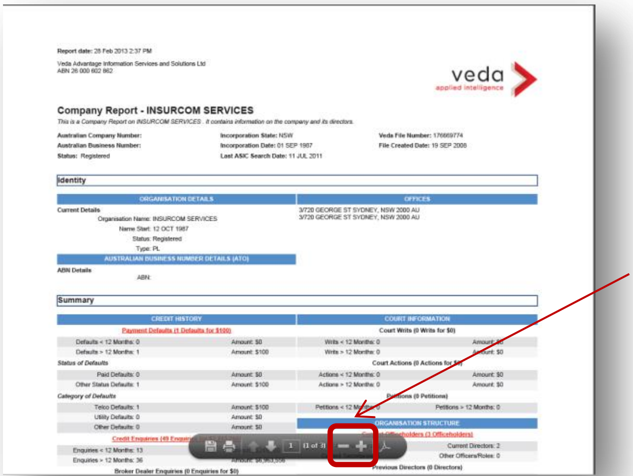


7. Log in to Case Manager
8. Search for the application you want to view.
9. Click on the Application in the Application List
10. Open the Credit Bureau Report
11. Click **Print**

2.9.3 Zoom in/out of a credit bureau report

The Credit Bureau Reports are opened as PDF files and provide the option to zoom in and out.

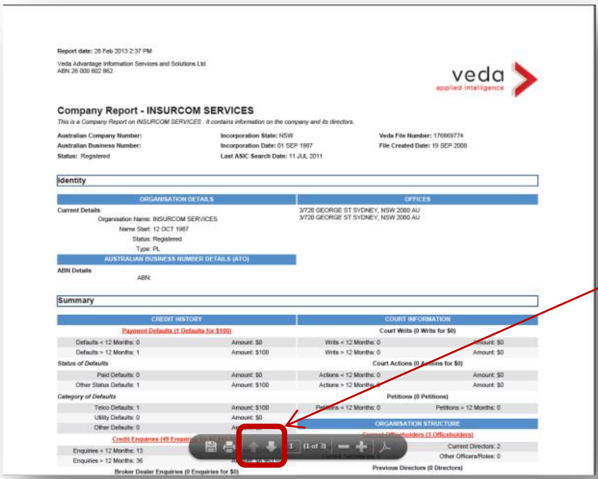
To zoom in or out of a Credit Bureau Report:



12. Log in to Case Manager
13. Search for the application you want to view.
14. Click on the Application in the Application List
15. Open the Credit Bureau Report
16. Click **+** to zoom in or **–** to zoom out

2.9.4 Move between pages of a credit bureau report

The Credit Bureau Reports are opened as PDF files and the user can move between the pages of the document.



To move between the pages of a Credit Bureau Report:

1. Log in to Case Manager
2. Search for the application you want to view.
3. Click on the Application in the Application List
4. Open the Credit Bureau Report
5. Click the up and down arrows to move through the pages.

Using Case Manager- Section Summary

Key points covered in this section are:

- ☑ **Case Manager is used to perform actions against credit applications**
- ☑ **The user can perform the following actions:**
    - **Search for and view credit applications**
    - **Edit applications**
    - **Apply notes to credit applications**
    - **Create new credit applications**
    - **Open an existing credit application**
    - **User-Defined functions**
    - **Refresh the application details**
    - **View and Save Credit Bureau Reports**