

ER Case Management Tool

ServiceNow Proposed Refactor

What's Inside

ER Case Management Tool | SNow

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Personas

Intake Specialist



Maribeth Lin

Intake Specialist | Corporate | 47 yrs old

I am an **Intake Specialist** in **Corporate** who needs to **effectively define and submit a case** so that a **Case Manager** can conduct a **review and determine a result**.

CURRENT GRIEVANCES

Quickbase

- No system interconnectivity when claims are reported
- Too much variation in the way claims are reported (email, Zoom, Word Doc)
- Case Manager is left to enter in most of the case information

SNOW

- Intake form could be more robust to reduce steps for case managers

NEEDS

- More details about Involved Parties: Email, Subject Type, Claim(s)
- Incident Date and Location
- Reported Date and Location (if different)
- Access to Non-SAP employees and employees outside of my business

Case Manager



Lainey Kirtz

Sr Manager, ER | Legacy DGE | 36 yrs old

I am a **Case Manager** in Legacy DGE who needs to **efficiently and accurately manage a case** so that an **appropriate outcome can be determined** and included in reporting.

CURRENT GRIEVANCES

Quickbase

- No system interconnectivity when claims are reported
- More fields than needed
- No access to parties outside their business unit

SNOW

- Too many clicks required
- Tabbed format is confusing and distracting
- Associations between claims, subjects, and outcomes is unclear
- Some tabs are unnecessary & tab order isn't ideal
- It's difficult to see subject's case history
- Real estate on the screen is not utilized wisely
- Nothing ever looks finalized / always seems editable

NEEDS

- Quick and easy way to add/start a new case - not scroll through a list
- Clear relations between parties, claims, and outcomes
- More efficient way to assign party type
- Ideally, no tabs - all on one page
- Simplified workflow with less clicking
- Access to parties in other businesses
- "Action Needed" or defined follow up dates when managing multiple cases at once
- Less fields - only show what we need, when we need it

VP



Kris Kizer

VP | ESPN | 54 yrs old

I am a **VP** in **ESPN** who needs to quickly view specific case summaries so that I can see an overarching view of cases within a certain timeframe.

CURRENT GRIEVANCES

Quickbase

SNOW

- Seemingly impossible to capture a summary of a case

NEEDS

- View and gather key details of a case
- Ability to export a case
- Ability to select a timeline and view cases within it

Overview

Pain Points



Disorientating Navigation

The additions of tabs throughout case management affords unnecessary complexity.



Too Many Fields

Case managers would like to see only what is required to successfully manage the case.



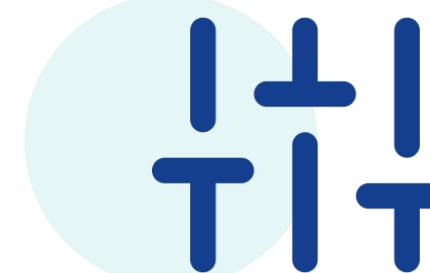
Valueless Clicks

The amount of clicks to perform a task is a constant area of concern.



Unfamiliar Verbiage

The nomenclature is foreign to the wording case managers are used to.



Task Variation

Case managers found that there were too many variations of completing a single task.

Opportunities



Streamline the Workflow

Render a linear mental model for case management.



Profitable Clicks

Create an environment where every step and/or click is beneficial to the case.



Clear Correlation

Make evident which claims are associated to which party and outcome.



Efficient Real Estate

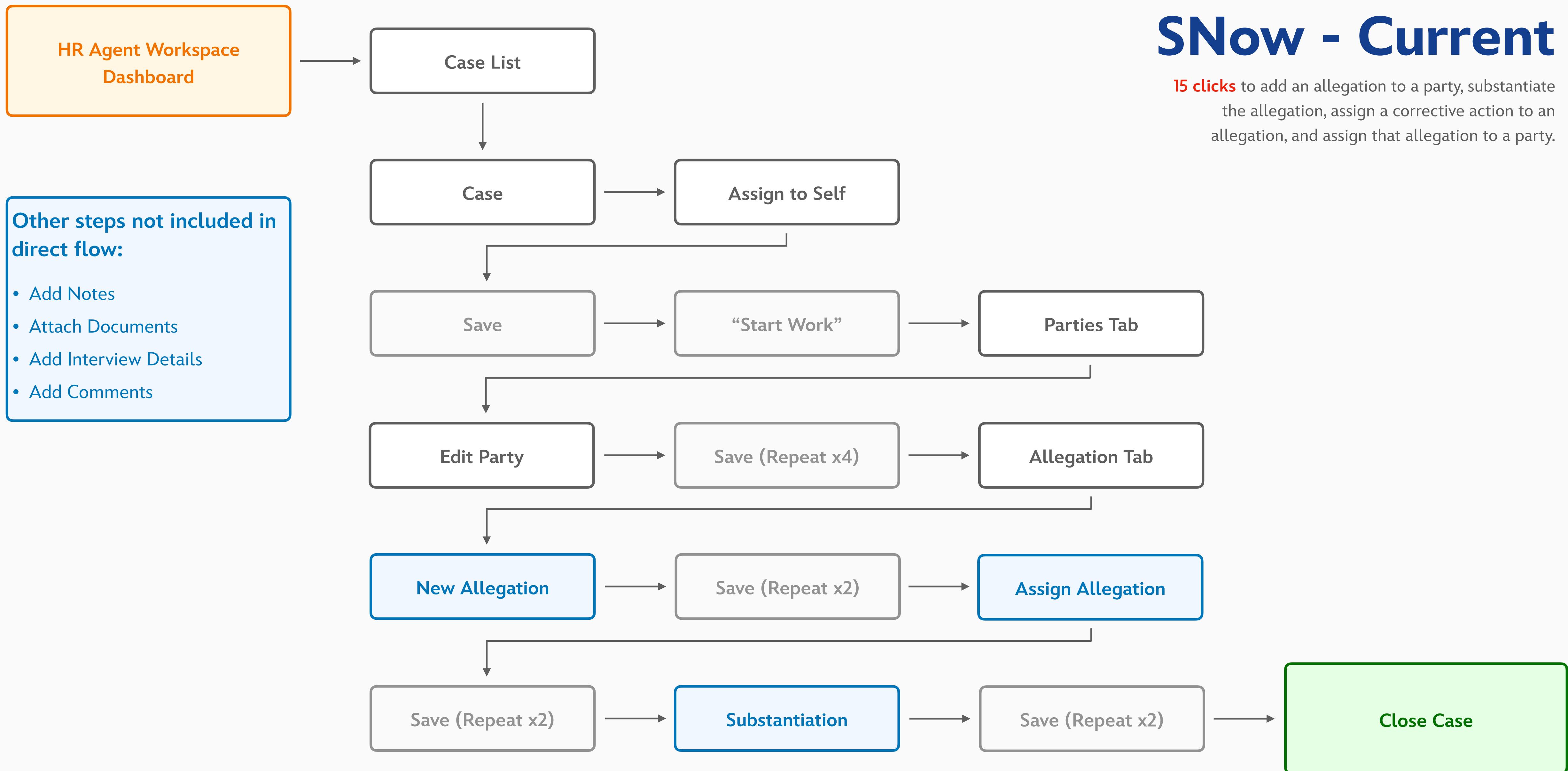
Make use of the screen's space to effectively display information and fields.



Desired Features

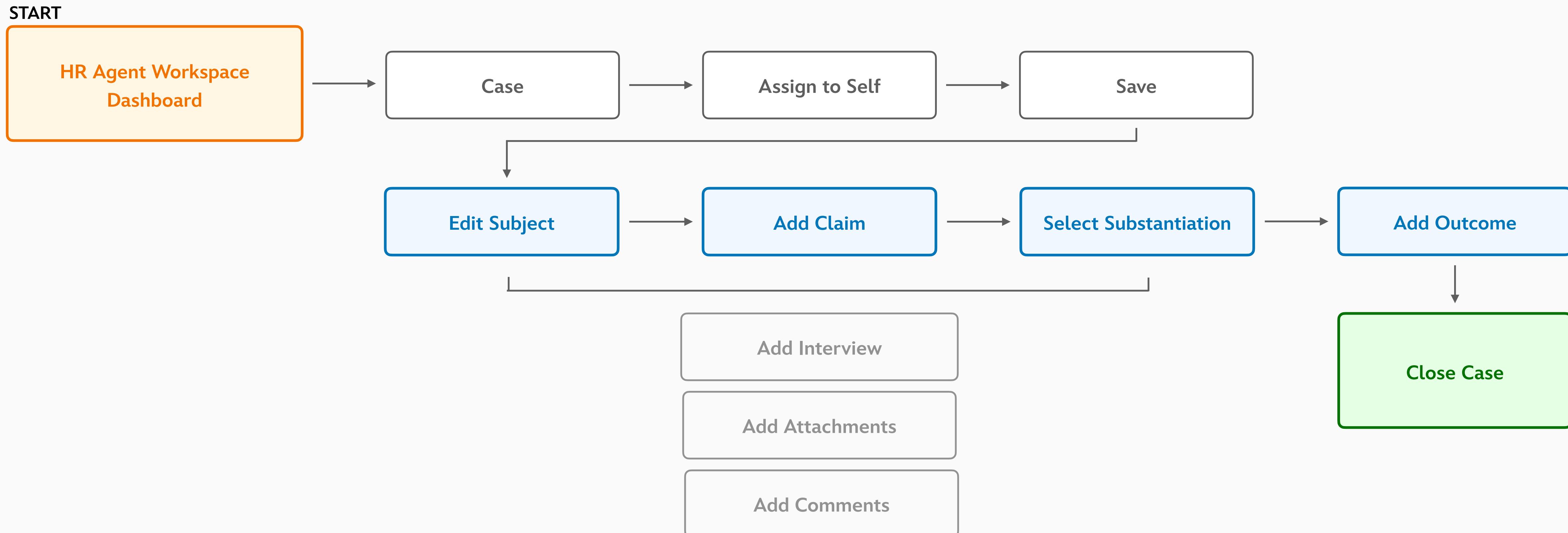
Case export, auto-save, pre-populated form fields, and Outlook integration.

START



Proposed Workflow

5 clicks to add a claim, findings and assign an outcome to a party.



HR Agent Dashboard



Home



2023-08-07 08:01

Hey, Sara!

Here is the snapshot of what's important.

Open items for my team

125

My team's unassigned cases

251

My team's open cases

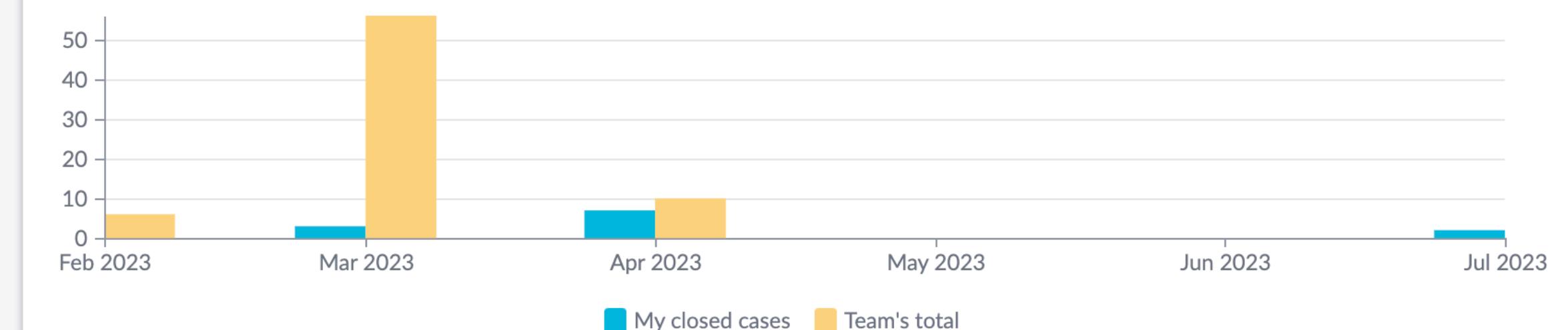
18

My Assigned Cases

99

My team's high priority cases

Cases closed over the last 6 months



Overview

All cases

19HRC0002219
Opened Apr 24

① 3 months breached

Report Misconduct case for Amanda Cole

Priority 2 - High State Work in Progress Last updated a month ago

HRC0002030
Opened Mar 29

① 4 months breached

Report Misconduct case for System Administ...

Priority 2 - High State Ready Last updated 4 months ago

HRC0000111
Opened Feb 27

① 4 months breached

Report Harassment

Priority 4 - Low State Work in Progress Last updated 4 months ago

My cases by request type





My Cases

Open Cases (17) Closed Cases (128)

Subject(s) ▾	Case Type(s) ▾	Updated ▲	Opened ▾	Status ▾
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	In Progress
Rick Kurtz	Misconduct	04-01-2023	04-01-2023	In Progress
Kellan Rhyms	Harassment	03-23-2023	03-27-2023	In Progress
Rebecca Marsh	Misconduct	04-02-2023	03-22-2023	In Progress
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	In Progress
Rick Kurtz	Misconduct	04-01-2023	04-01-2023	On Hold
Kellan Rhyms	Harassment	03-23-2023	03-27-2023	On Hold
Rebecca Marsh	Misconduct	04-02-2023	03-22-2023	In Progress
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	In Progress
Rick Kurtz	Misconduct	04-01-2023	04-01-2023	In Progress
Kellan Rhyms	Harassment	03-23-2023	03-27-2023	In Progress
Rebecca Marsh	Accommodations	04-02-2023	03-22-2023	Approved with Follow-up
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	On Hold
Rick Kurtz	Accommodations	04-01-2023	04-01-2023	Approved with Follow-up
Kellan Rhyms	Accommodations	03-23-2023	03-27-2023	Approved with Follow-up

+ New Case

My To Do List

- Misconduct Case for Jim Parsons & Mike Webble**
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad mini.
- Misconduct Case for Rebecca Marsh**
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad mini.

+ Add a Todo

Unassigned Cases (9)

Case Type(s) ▾	Opened ▲
Misconduct	04-02-2023
Misconduct	04-01-2023
Misconduct	03-23-2023
Conflict of Interest	04-02-2023
Misconduct	04-02-2023



Prototype



Dashboard

My Open Cases

- Searchable
- Subject(s)
- Case Type(s)
- Updated Date
- Opened Date
- Status

My To Do List

- Curated Action Items
- Feature to require further discovery

Unassigned Cases

- Case Type(e)
- Opened Date

ER Case Manager

Search

My Cases

[Open Cases \(17\)](#) [Closed Cases \(128\)](#)

Subject(s) ▾	Case Type(s) ▾	Updated ▲	Opened ▾	Status ▾
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	In Progress
Rick Kurtz	Misconduct	04-01-2023	04-01-2023	In Progress
Kellan Rhyms	Harassment	03-23-2023	03-27-2023	In Progress
Rebecca Marsh	Misconduct	04-02-2023	03-22-2023	In Progress
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	In Progress
Rick Kurtz	Misconduct	04-01-2023	04-01-2023	On Hold
Kellan Rhyms	Harassment	03-23-2023	03-27-2023	On Hold
Rebecca Marsh	Misconduct	04-02-2023	03-22-2023	In Progress
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	In Progress
Rick Kurtz	Misconduct	04-01-2023	04-01-2023	In Progress
Kellan Rhyms	Harassment	03-23-2023	03-27-2023	In Progress
Rebecca Marsh	Accommodations	04-02-2023	03-22-2023	Approved with Follow-up
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	On Hold
Rick Kurtz	Accommodations	04-01-2023	04-01-2023	Approved with Follow-up
Kellan Rhyms	Accommodations	03-23-2023	03-27-2023	Approved with Follow-up

< 1 2 >

My To Do List

[+ New Case](#)

Misconduct Case for Jim Parsons & Mike Webble
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad mini.

Misconduct Case for Rebecca Marsh
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad mini.

[+ Add a Todo](#)

Unassigned Cases (9)

Case Type(s) ▾ **Opened ▲**

Misconduct	04-02-2023
Misconduct	04-01-2023
Misconduct	03-23-2023
Conflict of Interest	04-02-2023
Misconduct	04-02-2023

< 1 2 >

[+ Add Chart](#)

Case Stats

[Case Type Breakdown](#) [Chart / Graph](#)

Case Management



Lists

HRC0000157



Details



Report Discrimination ⚙

HR service

[Report Misconduct](#)[Discuss](#)[Save](#)[Cancel](#)

▼



Details

HR Tasks

Task SLAs

Involved Parties (2)

Allegations (1)

Interviews

Evidence

Corrective Actions (1)

More ▾

Employee Relations Case

Number

HRC0000157

State

Ready

Incident Description

 External opened for ⓘ

Opened for * ⓘ

Carol Krisman



Preferred contact method

Not Specified



HR service *

Report Misconduct



Incident date ⓘ

Priority *

4 - Low

Source(contact_type)

-- None --

Opened

2023-03-06 16:00:00

Opened by

System Administrator

Your employee



Carol Krisman

Carol's team

Department
Sales (0054)

Carol's recent cases

HRC0000179
Report Fraud and Theft

Ready

Assigned to
(empty)
Priority
4 - Low
Opened Mar 10[View all cases](#)

Assignment group

Employee Relations



Assigned to ⓘ



[Home](#) > [Case for Jim Parsons & Mike Webble](#)

Case for Jim Parsons & Mike Webble

[Delete Case](#)[Save](#)

Case Number: HRC0003938 Case Type(s): [Misconduct, Harassment](#) Business: Disney Entertainment Television
Opened: 07/12/2023 Updated: 07/25/2023

[In Progress](#)

Incident Details

Assigned To

Reported By Channel

Incident Date*

Incident Location*

Incident Summary*

Jim Parsons and Mike Webble were seen by Sam Pericski speaking unprofessionally and inappropriately to Jess Martinez. Jess was noticeably uncomfortable. Jim proceeded to put his arm around Jess.

Resolved Date

Resolution Summary

[Export Case Report](#)

Keywords

[Talent](#) [SH](#)

Attachments

[Upload](#)

Or Drag & Drop

Interview Notes 07/02/23



▼

Correspondence 07/01/23



▼

Email Thread 07/01/23



▼

Email Thread 07/01/23



▼

Correspondence 07/01/23



▼

[Prototype](#)



Static Details

Determined Automatically

- Case Title
- Case Number
- Case Type(s)
- Opened & Updated Dates

Determined by Case Manager

- Status (i.e. Work in Progress, Cancelled, Closed)
- Delete Case
- Save (+ recurring autosave every # seconds)

ER Case Manager Search

Home > Case for Jim Parsons & Mike Webble

Case for Jim Parsons & Mike Webble

Case Number: HRC0003938 **Case Type(s):** Misconduct, Harassment **Business:** Disney Entertainment Television
Opened: 07/12/2023 **Updated:** 07/25/2023 In Progress

Incident Details

Assigned To: Melissa Garret Reported By Channel: Email

Incident Date*: 06/29/2023 12:13PM Incident Location*: [Location]

Incident Summary*: Jim Parsons and Mike Webble were seen by Sam Pericks speaking unprofessionally and inappropriately to Jess Martinez. Jess was noticeably uncomfortable. Jim proceeded to put his arm around Jess.

Resolved Date: MM/DD/YYYY 00:00

Resolution Summary:

Attachments

Upload Or Drag & Drop

Interview Notes 07/02/23 Download Delete

Correspondence 07/01/23 Download Delete

Email Thread 07/01/23 Download Delete

Email Thread 07/01/23 Download Delete

Correspondence 07/01/23 Download Delete

Summary 07/01/23 Download Delete

Case Details Notes

Incident Details

- Assigned To (Case Manager)

Provided by Intake Form

- Reported By Channel
- Indecent Date & Location
- Incident Summary

After Resolution

- Resolve Date
- Comments / Notes

Incident Details

Assigned To

Melissa Garret

Reported By Channel

Email

Incident Date*

06/29/2023 12:13PM

Incident Location*

[Location]

Incident Summary*

Jim Parsons and Mike Webble were seen by Sam Pericski speaking unprofessionally and inappropriately to Jess Martinez. Jess was noticeably uncomfortable. Jim proceeded to put his arm around Jess.

Resolved Date

MM/DD/YYYY 00:00



Resolution Summary

Involved Parties

Party Information

- Name
- Role (i.e. Subject, Witness, Complainant, HRBP)
- Case History (see slide 19)
- Employee Details (see slide 20)

If Production Employee

- Production Company
- Distributor
- Show Name
- Location

If “Subject”

- Case Type
- Findings
- Resolution Type

SUBJECT
Jim Parsons
 

Name*

Jim Parsons, Sr Manager, Studio IT (010992) 

[View Case History](#)
[View Employee Details](#)

Role*

Subject 

Production Employee

Distributor

Freeform 

Production Company

20th Television 

Show Name

Black-ish 

Location

Georgia, USA 

Claims


Harassment: Sexual

General Case Type*

Harassment 

Specific Case Type*

Sexual 

Findings

Substantiated 

General Resolution Type

Termination 

Specific Resolution Type

Termination 

Involved Parties

Party Case History

- Modal View
- Searchable
- List View with the following:
 - Case Type(s)
 - Opened Date
 - Closed Date
 - Status
 - Involved Parties

Case History

X

Jim Parsons

Case Type(s) ▾	Opened ▾	Closed ▾	Status ▾	Involved Parties ▾
Harassment	04-02-2023	04-02-2023	Closed	Rilley Jamieson
Misconduct	04-01-2023	04-01-2023	Closed	Ken Pearson, Karen Lillian
Accommodations	03-23-2023	03-27-2023	Approved	Miles Stommer
Misconduct	04-02-2023	03-22-2023	Closed	Bailey Johnson, Brian Cawdell

Involved Parties

Employee Details

- Employee Information
 - Name
 - PRNR
 - Title
 - Business
 - Org
 - Leader
 - Type
 - Union/Non-Union
 - Hire Date

Employee Details



EMPLOYEE INFORMATION

Name	PRNR	Title
Jim Parsons	010992	Sr Manager, Studio IT
Business	Organization	Leader
Disney Entertainment Television	Information Technology	Serina Parker
Employee Type	Union	Adjusted Hire Date
Exempt	No	02/13/2016

CONTACT INFORMATION

Phone	Email	Address
916-339-0029	JIM.PARSONS@DISNEY.COM	Buena Vista Plaza Burbank , CA , USA

Work Contact Information

- Phone
- Email
- Address

Involved Parties

Non-SAP Employee

- Employee Information
 - First/Last Name
 - Title
 - Employee Type
 - Business / Region
 - Supervisor

- Contact Information

- Email
- Phone
- Location
- Production
- Address
 - Country
 - City
 - State / Province

Non-SAP Employee

Employee Information

First Name*	Last Name*	Title*
<input type="text" value="Enter First Name"/>	<input type="text" value="Enter Last Name"/>	<input type="text" value="Enter Title"/>
Employee Type*	Business / Region*	Supervisor
<input type="button" value="Select Employee Type"/>	<input type="button" value="Select Business / Region"/>	<input type="text" value="Enter Supervisor Name"/>

Work Contact Information

Email*	Phone*
<input type="text" value="Enter Work Email Address"/>	<input type="text" value="Enter Work Phone"/>

Location Name*	Production Name
<input type="text" value="Enter Location Name"/>	<input type="button" value="Select Production Name"/>

Address
<input type="text" value="Enter Adress"/>

Country	City	State / Province
<input type="button" value="Select Country"/>	<input type="button" value="Select City"/>	<input type="button" value="Select State / Province"/>

Notes / Activity Log

- Track notes with Rich Text Editor (formatted text)
- Notes saved chronologically
- Notes include author, date, and time
- Ability for author to edit or delete note

Case Notes

New Note



A screenshot of a rich text editor interface. At the top is a toolbar with various icons for text formatting: left and right arrows, bold (B), italic (I), underline (U), alignment options (left, center, right, justify), and other document-related icons. Below the toolbar is a large, empty text area for input. In the bottom right corner of the text area, there is a small double-line symbol.

Save Note

 **Melissa Garret** • 07/04/2023 • 12:01PM PT  
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor intce.

 **Melissa Garret** • 07/02/2023 • 12:30PM PT  
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor intce.

 **Melissa Garret** • 06/29/2023 • 08:23AM PT  
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor intce.

Right-Hand Actions

- **Export Case Report**

- Downloads entire case details and attachments into a single .zip

- **Keywords**

- Predefined keywords
- Add/Remove
- Indexed when searching for a report



Keywords

Talent SH

Keywords

Talent SH

Attachments

Upload
Or Drag & Drop

Interview Notes 07/02/23

Correspondence 07/01/23

Email Thread 07/01/23

Email Thread 07/01/23

Correspondence 07/01/23

Summary 07/01/23

NAME
summary_070123_1203.pdf

DESCRIPTION
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor intce.

Linked Cases

Case for Jessica Pearson (HRC0000157)

Right-Hand Actions

- **Upload**

- Drag & Drop or Upload from Computer
- Large file sizes allowed

- **Attachments List**

- Ordered Chronologically
- Upload Type (i.e. Interview Notes, Correspondence, Email, Summary)
- Upload Date
- Download Attachment
- Delete Attachment
- Details Viewable upon Collapse/Expand

Attachments

Upload

Or Drag & Drop

Interview Notes 07/02/23

Correspondence 07/01/23

Email Thread 07/01/23

Email Thread 07/01/23

Correspondence 07/01/23

Summary 07/01/23

NAME
summary_070123_1203.pdf

DESCRIPTION
Lorem ipsum dolor sit amet, consectetur adipiscing

Export Case Report

Keywords

Add a Keyword

Talent

SH

Attachments

Upload

Or Drag & Drop

Interview Notes 07/02/23

Correspondence 07/01/23

Email Thread 07/01/23

Email Thread 07/01/23

Correspondence 07/01/23

Summary 07/01/23

NAME
summary_070123_1203.pdf

DESCRIPTION
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor intce.

Linked Cases

Add a Linked Case

Case for Jessica Pearson (HRC0000157)

Right-Hand Actions

- **Linked Cases**

- Select & Link correlating cases
- Ability to Remove Linked Cases

Linked Cases

Add a Linked Case Q

Case for Jessica Pearson (HRC0000157) X

Keywords

Add a Keyword



Talent X SH X

Attachments

Upload

Or Drag & Drop

Interview Notes 07/02/23 Download Delete More



Correspondence 07/01/23 Download Delete More



Email Thread 07/01/23 Download Delete More



Email Thread 07/01/23 Download Delete More



Correspondence 07/01/23 Download Delete More



Summary 07/01/23 Download Delete More



NAME

summary_070123_1203.pdf

DESCRIPTION

Lore ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor intce.

Linked Cases

Add a Linked Case Q

Case for Jessica Pearson (HRC0000157) X

Closed Cases

- Read-Only

- Static Details
- Incident Details
- Case Details

- Actionable Items

- Export Case Report
- Add Keywords
- Upload/Manage Attachments
- Link Correlating Cases

ER Case Manager Search

Home > Case for Jim Parsons & Mike Webble

Case for Jim Parsons & Mike Webble

Save

Case Number: HRC0003938 Case Type(s): Misconduct, Harassment Business: Disney Entertainment Television
 Opened: 07/12/2023 Updated: 07/25/2023 Resolved: 08/13/2023

Closed

Export Case Report

Incident Details

Assigned To	Reported By Channel
Melissa Garret	Email
Incident Date	Incident Location
06/29/2023 12:13PM	[Location]

Incident Summary

Jim Parsons and Mike Webble were seen by Sam Pericski speaking unprofessionally and inappropriately to Jess Martinez. Jess was noticeably uncomfortable. Jim proceeded to put his arm around Jess.

Resolved Date

08/13/2023 5:12PM PT

Resolution Summary

Case Details Notes

SUBJECT **Jim Parsons**

Name	Role
Jim Parsons, Sr Manager, Studio IT (010992)	Subject

[View Case History](#) [View Employee Details](#)

Claims

Harassment: Sexual	General Case Type	Specific Case Type
	Harassment	Sexual

Keywords

Add a Keyword Q

Talent X SH X

Attachments

Upload
Or Drag & Drop

Interview Notes 07/02/23	Download Delete More
Correspondence 07/01/23	Download Delete More
Email Thread 07/01/23	Download Delete More
Email Thread 07/01/23	Download Delete More
Correspondence 07/01/23	Download Delete More
Interview Notes 07/02/23	Download Delete More
Correspondence 07/01/23	Download Delete More

Requirements

Requirements - DASHBOARD

Above the Fold

- *Prominent* list of **My Open Cases**
- “Add New Case” button
- *Smaller* list of **My Tasks**
- *Smaller* list of **Unassigned Cases**

Below the Fold

- Generalized Charts & Data
 - **Cases by Request Type**
 - **# of Cases Closed**
 - **# of Open Cases**

REMOVE

- Announcements
- Quick Links
- Frequently-Used Apps

Requirements - CASE MANAGEMENT (UI)

Key UI Requirements

- Case Details
- Involved Parties
- Attachments
- Keywords

REMOVE (Tabs)

- HR Tasks
- Task SLAs
- Allegations
- Interviews
- Evidence
- Corrective Actions
- Attached Knowledge
- Approvers
- Child Cases
- Allegation Outcomes

REMOVE (Sections)

- Case timeline
- All right-hand panel options except for attachments

Requirements - CASE MANAGEMENT (UI)

Case Details

- Case Number
- Incident Description (Rename to “Incident Summary”)
- HR Service (Rename to “Case Type”)
- State (Rename to “Status”)
- Assigned To
- Source (Rename to “Reported By Channel”)
- Opened Date
- Incident Date
- Short Description (Rename to “Case Title”)
- Description (Rename to “Resolution Summary”)
- Comments/Worknotes (Rename to “Notes”)

Involved Parties

- Display Name (Rename to “Employee Name”)
- Type (Rename to “Employee Type”)
- Allegation (Rename to “Case Type”)
- Allegation Outcome (Rename to “Findings”)
- Corrective Action (Rename to “Resolution”)

Requirements - CASE MANAGEMENT (UI)

Non-SAP Employee

- First Name
- Last Name
- Title
- Employee Type
- Business/Region
- Supervisor
- Work Email
- Work Phone
- Location Name
- Production Name
- Address
- Country
- City
- State

Production Employee

- Production Company
- Distributor
- Show Name
- Location

Requirements - CASE MANAGEMENT (Functionality)

Key Requirements

- All fields reportable
- Autosave capability
- Outlook integration
- Export Cases capability

File Uploading

- Allow large files
- Allow various file types (i.e., .zip and .ics)
- Drag & Drop

Requirements - CASE MANAGEMENT (Functionality)

Dropdowns, wherever possible

- Keywords
- State (Rename to “Status”)
- Source (Rename to “Reported By Channel”)
- Preferred Contact Method
- HR Service (Rename to “Case Type”)
- Type (Rename to “Employee Type”)
- Allegation (Rename to “Case Type”)
- Allegation Outcome (Rename to “Findings”)
- Corrective Action (Rename to “Resolution”)
- “Production Employee” Fields
 - Production Company
 - Distributor
 - Show Name
 - Location
- “Non-SAP Employee” Fields
 - Employee Type
 - Business/Region
 - Production Name
 - Country
 - City
 - State

Requirements - CASE MANAGEMENT (Functionality)

Autofilled / Imported Fields, wherever possible

- Case Number
- State (Rename to “Status”)
- Incident Description (Rename to “Incident Summary”)
- Source (Rename to “Reported By Channel”)
- Opened
- HR Service (Rename to “Case Type”)
- Incident Date
- Short Description (Rename to “Case Title”)
- Display Name (Rename to “Employee Name”)
- Type (Rename to “Employee Type”)
- Allegation (Rename to “Case Type”)