

opentext Core Case Management Software User Guide

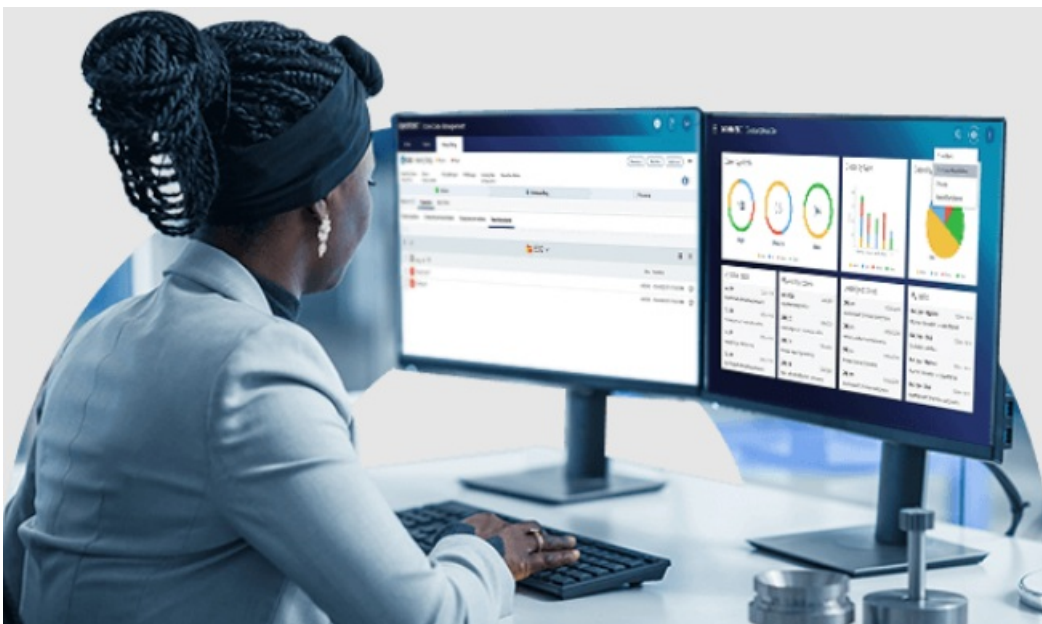
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opentext Core Case Management Software



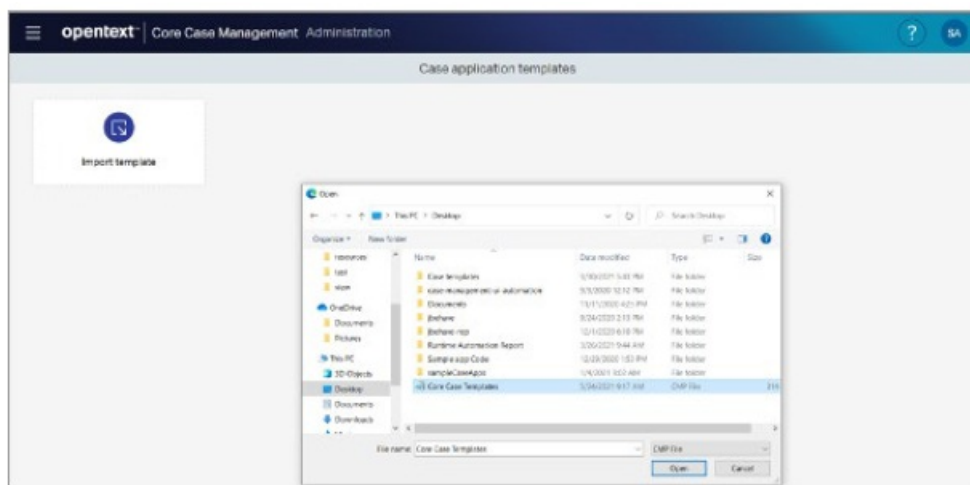
Welcome to OpenText Core Case Management, a SaaS case management application that lets users create and automate workflows and tasks and adjust them in real time.

This quick start guide overviews immediate actions required for a tenant admin to access and get started with the Core Case Management application including:

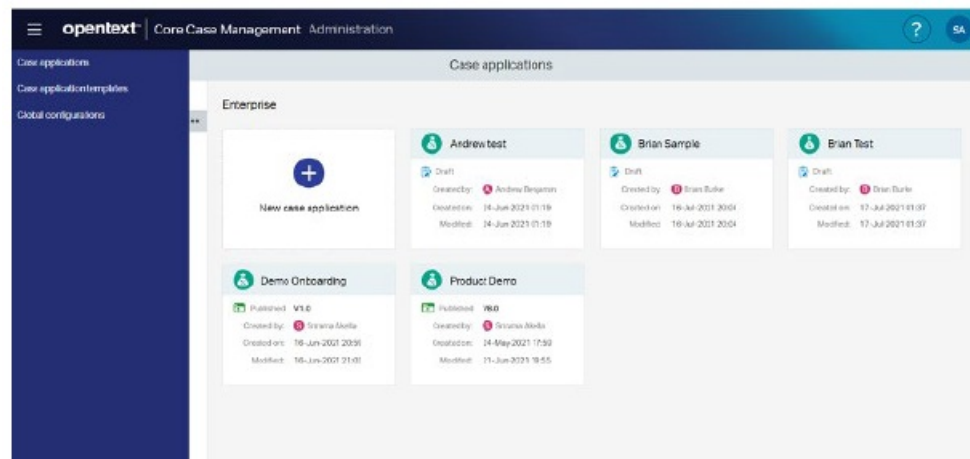
- Import case templates
- Create a case application from a template
- Create an instance
- Work on a case

Import Case Templates

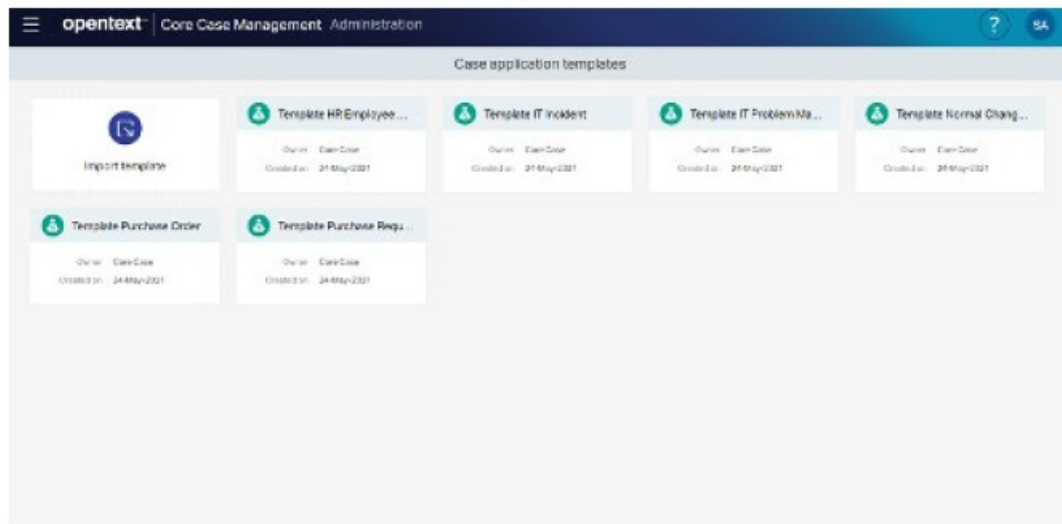
- Download the Core Case Management process templates from OpenText MySupport and save to a local drive.



- Navigate to Case application templates.



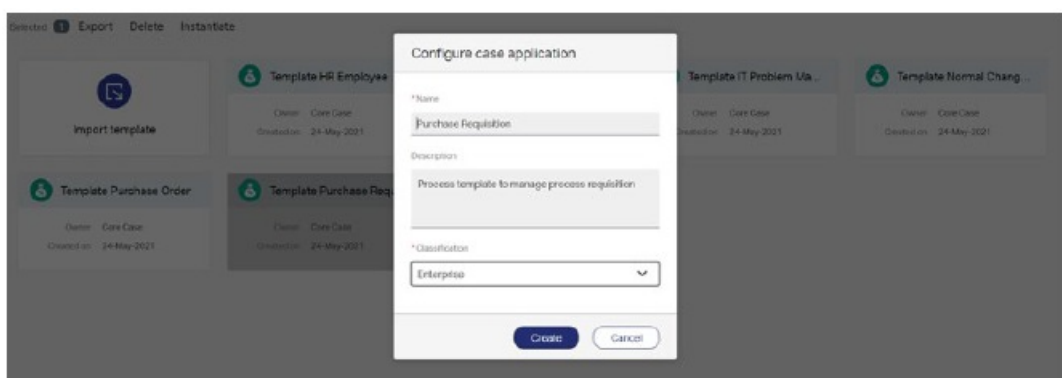
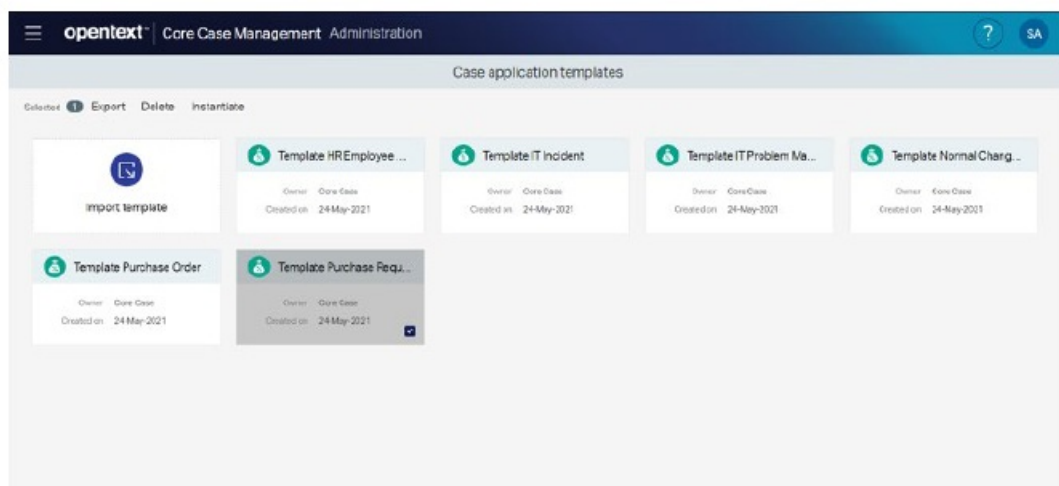
- Select Import template to import six process templates for HR, IT and Procurement use cases.



Create a Case

Application from a Template

- Select desired template (i.e. Purchase Requisition).
- Provide a template name and select Create.



- Under Settings, define general properties for the case.

The screenshot shows the 'Purchase Requisition' settings in the OpenText Core Case Management Administration interface. The 'Settings' tab is selected, and the 'General' section is active. The form includes the following fields:

- Name:** Purchase Requisition
- Description:** Process template to manage process requisition
- Classification:** Enterprise
- Case ID Generator:**
 - Prefix: PRIDemo
 - ID Generator: Numeric generator
 - Suffix:
- Default assignee:** Lookup users
- Default assignee group:**

- Add Users to each of the Functional Roles defined (i.e. Purchasing Associate, Purchasing Manager, Purchasing Approver). You can also delete the functional roles that are not required.

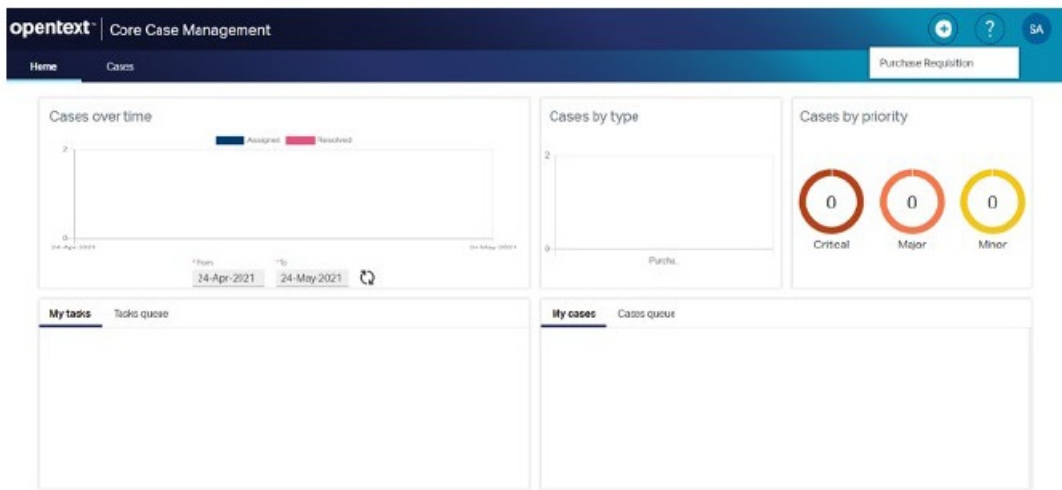
The screenshot shows the 'Edit functional role' dialog box in the OpenText Core Case Management Administration interface. The dialog is for the 'Purchasing Associate' role. The 'System role' is set to 'Case manager'. The 'User / group' field contains 'Lookupusers'. The 'Description' field is empty. The 'Save' and 'Cancel' buttons are at the bottom right.

- Publish the case application.

The screenshot shows the 'Publish' confirmation dialog box in the OpenText Core Case Management Administration interface. The dialog states 'Initiated publishing of the application successfully.' and has a 'Close' button at the bottom right.

Create a Case Instance

- Click on the '+' icon to see the list of available case applications.
- Select the desired case application (i.e. Purchase Requisition) and fill in the required details and select Create.



Work on a Case

- Select Assign to assign the task to a user.

The interface shows the 'PRDemo1 - Printer purchase' case. The 'Assign' dialog box is open, showing the user 'Srinama Arakita' and the 'Assign' button.

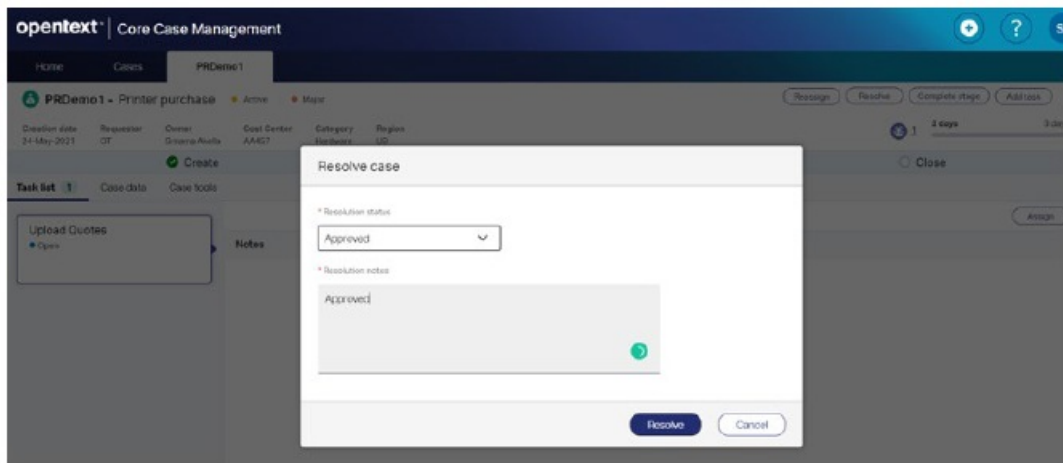
- Update Case properties and complete the Task. Repeat these steps for additional tasks as needed.

The interface shows the 'PRDemo1 - Printer purchase' case. The 'Case properties' section is visible, showing the following details:

- Request for:** Printer purchase
- Summary:** Printer purchase
- Requestor:** OT
- Priority:** Major
- Category:** Hardware
- Cost Center:** AA657
- Region:** US
- Approximate cost:**

The 'Requisition Form' is shown as 'In progress' with the user 'Srinama Arakita' assigned to it.



- Resolve the case by selecting the appropriate status (i.e. Approved), add notes and select Resolve.



Tip: Learn how to create a new case application in the Create a Case Application Quick Start Guide.

Need more help? Watch the Core Case Management how-to videos or visit the Community Forum.

Documents / Resources

 <p>OpenText Core Case Management Software User Guide</p>	<p>opentext Core Case Management Software [pdf] User Guide</p> <p>Core Case, Management Software, Core Case Management Software, Management, Software</p>
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