

WorkView for Commercial Insurance

July 2022





Facilitator's Name and Producer's Name





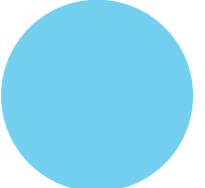
Our Objectives - WorkView

Be prepared for an immediate launch of WorkView for Commercial Insurance:

1. Understanding what WorkView is and its benefits
2. Becoming familiar with task workflow, including task types, ownership, and outcomes
3. Understanding how to navigate and manage tasks in WorkView



WorkView Agenda

-  **What is WorkView?**
-  **WorkView Tasks and Task Outcomes**
-  **Accessing WorkView**
-  **Filters, Sorting, and Search Features**
-  **Opening a Task and Completing a Task**
-  **View Related/Predecessor Tasks**
-  **Resources Available**

What is WorkView?



●●●● *What is WorkView?*

WorkView is the tool where tasks are created and managed from the time the submission comes into the company...

to the time the policy is issued...

including any subsequent transactions and renewals

WorkView Tasks and Task Outcomes





WorkView Task Matrix Job Aid

Selected supporting resources were omitted to protect proprietary materials.

Accessing WorkView



Business Center

Using the Desktop Version of Document Management System

Click Work Management

Websites

Unity
Community
OnBase
OnBase Training - Outlook Integr
OnBase Training - Unity Client Ess
OnBase Training - Virtual Print Dri

RSS Tic

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The Hy

<http://unity.hyland.com>

Expand your OnBase experience: Join Community

Join Community, your collaborative, educational and inspirational outlet where OnBase customers and partners find the information they need, when they need it, provided by OnBase experts from around the globe.

Members stockpile OnBase prowess by knowing where to find what, contributing to discussions and influencing changes to the software; uncover hidden tips, tricks and tools; and unlock the key to building organization-specific roadmaps that use technology to accomplish ongoing business objectives.

[Start by registering at Community today](#)

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[Visit Training.Hyland.com](http://Training.Hyland.com)

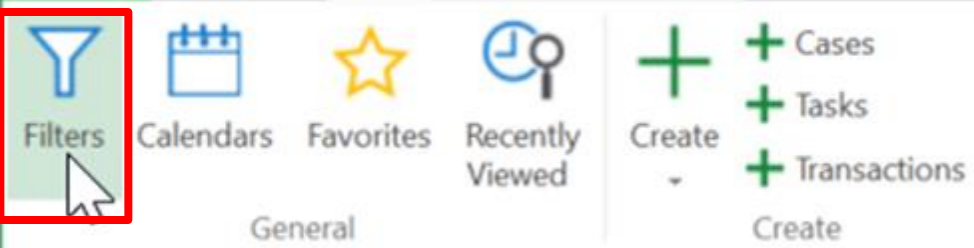
Network with fellow OnBase users, administrators, developers and experts at CommunityLIVE

More than just an OnBase user conference, CommunityLIVE is the one place to go to learn how every department in your organization can work better, smarter and faster.

CommunityLIVE brings together 1,500+ OnBase end users, developers, executives and experts from industries all around the world, all of whom:

- Network with peers in similar industries and departments
- Learn how other OnBase customers optimize their business processes
- Get hands-on experience with the latest OnBase innovations
- Connect with OnBase executives, experts and developers
- Attend targeted sessions and training classes for all levels of OnBase knowledge

[Visit the CommunityLIVE website to learn more](#)



Select Filters

Filters
Displays the list of filters for this application.

OnBase
OnBase Training - Outlook Integr
OnBase Training - Client Ess
OnBase Training - Virtual Print Dri

RSS Ticker

50+ RPA use cases
The Hyland Blog6/13/2022 11:14:12 AM

<http://unity.hyland.com>

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- Filters**
- Tasks & Notes
 - My Tasks
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 - My Follow-up Notes
 - My TeamMates' Tasks
 - My Cases
 - IT Admin
 - Business Admin
 - Search
 - User Defined Filters
 - Agent Notification
 - Business Center**
 - IT QA & Testing

Note: You will not see IT Admin, Business Admin, and IT QA & Testing under Filters

Select Business Center

FB_Tasks_MyTasks_NotClosed

Sub Type	Task Priority	Submission Number	Create Date	StartDate	Due Date	Client Name	Agent Name	Assigned Team
...	5/24/2022 1:48 PM	5/24/2022 1:47 PM				
...	5/24/2022 8:29 AM	5/24/2022 8:21 AM				
...	5/24/2022 8:25 AM	5/24/2022 8:40 AM				
...	5/24/2022 8:29 AM	5/24/2022 1:18 PM				
...	5/24/2022 9:47 AM	5/24/2022 11:28 AM		...	...
...	5/24/2022 12:25 PM	5/24/2022 1:22 PM		...	...
...	5/24/2022 1:23 PM	5/24/2022 1:23 PM				
...	5/24/2022 4:07 PM	5/24/2022 4:16 PM		...	...
...	5/24/2022 4:28 PM	5/27/2022 3:18 PM		...	...
...	5/24/2021 3:43 AM	6/1/2022 10:18 AM	5/1/2021 10:00	May 4 Chase	...	Documentation Review Clearance
...	5/24/2021 9:22 AM	6/1/2022 10:18 AM	5/1/2021 10:00	...	...	Documentation Review Clearance
...	5/1/2021 11:07 AM	6/1/2022 10:18 AM	5/1/2021 1:07 PM	...	...	Documentation Review Clearance
...	5/27/2022 2:07 PM	5/27/2022 3:18 PM	5/27/2022 4:07	...	...	Documentation Review Clearance

Open Create Delete Add to Favorites Add to Personal Page Add to Tile Groups Save Filter Settings Auto Size Column Widths Reset Filter Settings Display Column Chooser Open in New Window Collapse All Print Print Preview Export to Excel Compose Document Refresh Retrieve all records Display as Dashboard

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 - Clearance: Inland Marine
 - Filings Requests
 - Filings Awaiting Approval
 - IT QA & Testing

FB_Tasks_MyTasks_NotClosed

Task ID	Task Type	Task Sub Type	Task Priority	Submission Number	Create Date	StartDate	Due Date	I	Client Name	Agent Name	Assigned Team
13290	Info Gathering & Prep	Account Setup & Clearance			5/26/2021 1:44 PM	5/26/2021 1:47 PM					
13287	Info Gathering & Prep	Account Setup & Clearance			5/26/2021 9:29 AM	5/26/2021 9:31 AM					
13288	Info Gathering & Prep	Account Setup & Clearance			5/26/2021 9:35 AM	5/26/2021 9:40 AM					
13285	Info Gathering & Prep	Account Setup & Clearance			5/26/2021 9:29 AM	5/26/2021 1:19 PM					
13286	Info Gathering & Prep	Underwriter Review		10074001076	5/26/2021 9:47 AM	5/26/2021 11:39 AM			Western Industries Inc	Inland Marine New Admitted WA Agency	
13289	Info Gathering & Prep	Underwriter Review		10074001080	5/26/2021 12:25 PM	5/26/2021 1:22 PM			Sealing New Admitted WA	Inland Marine Occidental WA Agency	
13284	Info Gathering & Prep	Account Setup & Clearance			5/26/2021 1:23 PM	5/26/2021 1:23 PM					
13278	Info Gathering & Prep	Underwriter Review		10074001086	5/26/2021 4:07 PM	5/26/2021 4:16 PM			Smith Inc	Condo Office Package Condo Property	
13272	Info Gathering & Prep	Underwriter Review		10074001087	5/26/2021 4:26 PM	5/27/2021 3:19 PM			John Fogarty	Inland Marine Program Agency	
13274	Info Gathering & Prep	Documentation Review and Clearance		10074	5/26/2021 5:42 AM	5/27/2021 10:18 AM	5/27/2021 10:00		May & Chavis	New General Insurance Brokers	Documentation Review Clearance
13275	Info Gathering & Prep	Documentation Review and Clearance		10074	5/26/2021 9:32 AM	5/27/2021 10:18 AM	5/27/2021 10:00		WEL SPENCER INC	USG Insurance Services Inc - New England	Documentation Review Clearance
13276	Info Gathering & Prep	Documentation Review and Clearance		10074	5/27/2021 11:07 AM	5/27/2021 10:18 AM	5/27/2021 1:07 P		CCRS INSURANCE INC	Hulls & Cargo Inc	Documentation Review Clearance
13277	Info Gathering & Prep	Documentation Review and Clearance		10074	5/27/2021 2:07 PM	5/27/2021 3:19 PM	5/27/2021 4:07		WENTLEY ORGANIZATION LLC	Boats & Accessories	Documentation Review Clearance

Notice the filters/queue for Clearance for Condo Office and Inland Marine

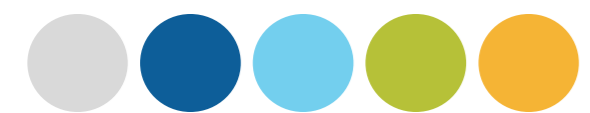
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Task ID	Task Type	Task Sub Type	Submission Number	Client Name	Create Date	Agent Name
12084	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12085	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12087	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12088	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12089	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12091	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12092	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12093	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12094	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12095	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12096	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12097	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12098	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12099	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12100	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12101	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12102	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12103	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12104	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12105	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12106	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12107	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12108	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12109	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12110	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12111	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	
12112	Info Gathering & Prep	Account Setup & Clearance			5/16/2022 3:47 PM	

By default, the tasks are sorted by oldest to newest

Filters, Sorting, and Search Features



Work Management

Filters

- Tasks & Notes
- IT Admin
- Business Admin
- Search
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FB_Tasks_MyTasks_NotClosed x Triage Change Requests x

Task ID	Task Type	Task SubType	Submission Number	Quote/Policy Number	Client Name	Create Date
1152	Task	Change Request	1001000000		San North 00 3 10 2022	5/26/2022 1:00 PM
1153	Task	Change Request				5/26/2022 2:41 AM
1154	Task	Change Request				5/26/2022 2:48 AM
1157	Task	Change Request				6/15/2022 11:10 AM
1161	Task	Change Request				6/15/2022 11:21 AM
1166	Task	Change Request				6/15/2022 4:10 PM
1423	Task	Change Request				5/11/2022 3:22 PM

Each filter will show you the applicable tasks in the queue

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FB_Tasks_MyTasks_NotClosed * Triage Change Requests *

Task ID	Task Type	Task SubType	Submission Number	Quote/Policy Number	Client Name	Create Date
1100	Change Request	Change Request	1000000000		1000000000	1/1/2022 1:00 PM
1101	Change Request	Change Request	1000000000		1000000000	1/1/2022 1:01 AM
1102	Change Request	Change Request	1000000000		1000000000	1/1/2022 1:02 AM
1103	Change Request	Change Request	1000000000		1000000000	1/1/2022 11:10 AM
1104	Change Request	Change Request	1000000000		1000000000	1/1/2022 11:21 AM
1105	Change Request	Change Request	1000000000		1000000000	1/1/2022 4:10 PM
1106	Change Request	Change Request	1000000000		1000000000	1/1/2022 3:12 PM

Click a column heading to sort by that column

Note: keep in mind the filters/queue tasks must be worked starting with the first created (or oldest)

Open Create Delete Add to Favorites Add to Personal Page Add to Tile Groups Save Filter Settings Auto Size Column Widths Reset Filter Settings Display Column Chooser Open in New Window Collapse All Print Print Preview Export to Excel Compose Document Refresh Retrieve all records Display as Dashboard

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FB_Tasks_MyTasks_NotClosed * Triage Change Requests *

Task I	Task Type	Task SubType	Submission Number	Quote/Policy Number	Client Name	Create Date
1423	Task	Change Request				6/15/2022 3:22 PM
1388	Task					6/15/2022 4:18 PM
1387	Task					6/15/2022 11:21 AM
1387	Task	Change Request				6/15/2022 11:18 AM
1386	Task	Change Request				5/26/2022 3:48 AM
1385	Task	Change Request				5/26/2022 3:47 AM
1372	Task	Change Request	1007100000		San Ramon CO, 5/18/2022	5/26/2022 3:48 PM

If you click the column again, it reverses the sort order

●●●● Questions?



Opening a Task and Completing a Task



File Home IAT - Work Management Filter

Open Create Delete Add to Favorites Add to Personal Page Add to Tile Groups Save Filter Settings Reset Filter Settings Display Column Chooser Auto Size Column Widths Open in New Window Collapse All Print Print Preview Export to Excel Compose Document Refresh Retrieve all records Display as Dashboard

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The task will open in a new window

When you open a task, the task will be assigned to you and will no longer appear in the filter/queue

AutonomousTasks

File AutonomousTasks Tasks

Save and Close Copy Object Save and New Add to Delete Refresh History Documents Forms Import Discussions Start a Discussion

Autonomous Task Admin AutonomousTask View

Task Type : Info Gathering & Prep Task ID : 13578

Task Sub Type : Account Setup & Cleara... Task Due Date :

Task Information		Account Information	
Task Type	Info Gathering & Prep	Submission Number	
Task Sub Type	Account Setup & Clearance	Quote Number/Policy Number	
Transaction Type		Wind Policy Term	
Assigned Name		System Information	
Assigned User	Tamara Lewis	Task ID	13578
Task Status	In Progress	Workflow ID	13578
Task Priority		Producer ID	
Task Description	Email Subject: TEST - NEW SUBMISSION TO QUOTE NEW HAVEN AND WICHAM, LLC 6/20/22	Name	Condo Office Submissions

Task ID	Task Type	Task Sub Type	Submission Number	Client Name	Create Date	Agent Name
13588	Info Gathering & Prep	Account Setup & Clearance			6/13/2022 4:03 PM	

File Tasks Tasks

Save and Close Copy Object Save and New Add to Delete Refresh Subscribe Import Forms Documents First Object Previous Next Last

History

The History button allows you to view the events related to the task

History
View history and events related to this object.

Tasks* Related Workflow Tasks Related Cases Admin Ta

Task Type : Info Gathering & Prep

Task Sub Type : Prep Import Template Broker / Agency : Task Due Date

Account Information

Blurred content area for account information.

Task Information

Task Type: Info Gathering & Prep

Task Sub Type*: Prep Import Template

Task Status: In Progress

Outcome/Reason:

Task Complexity:

Task Priority:

Assigned Team:

Assigned User:

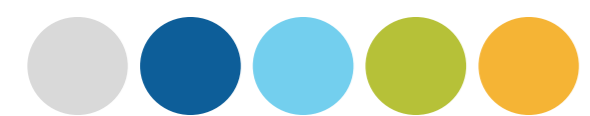
Selected operational workflows, job aids, and proprietary support materials were removed from this portfolio sample.

View Related/Predecessor Tasks

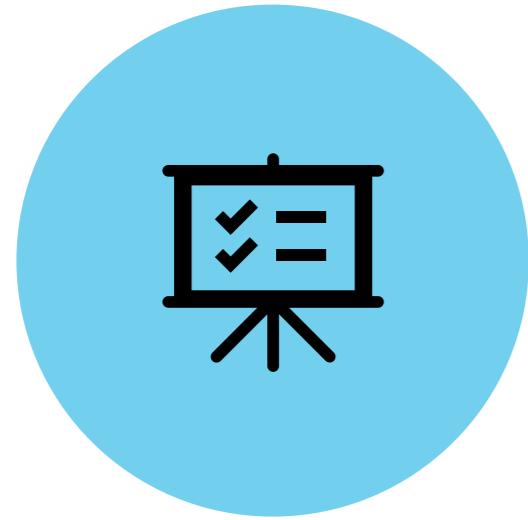


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Resources Available



●●●● *Resources From this Training*



PowerPoint Slides

●●●● *Business Application Support*

When contacting Duck Creek Support, please remember to include the following information in the email or voicemail.

- User Name
- Segment
- Reference Number
- Effective Date
- Template if applicable
- Description of the Issue
- Expected Results
- What is the urgency (is the system down, is the Agent awaiting a quote)
- Please provide screen-prints if available

The Support team is available to walk through the issue with you!

Support

Report Technical, Procedural and Quality Related Issues.

Email: [support@\[redacted\]](mailto:support@[redacted])

Call:
Internal [redacted]
External [redacted]

The Support Team is available:
Monday - Friday 8:00 a.m. - 8:00 p.m. EST

Please complete the Evaluation form and Thanks for attending!

