er Navigator
CLOUD CORPORATE

Replace traditional paper files and processes

Welcome to the erNavigator Cloud Corporate introduction series

In this document, we will explore how erNavigator digitizes case files and replaces traditional paper files and processes. We will also review how each digital case file interacts with the erNavigator workflow.

Digital case file

erNavigator's digital case files replace traditional paper-based files and integrates seamlessly with automated workflows to simplify processing of labor relations issues.

When a case is started, erNavigator opens a new digital case file and assigns it a unique case number. Each case file is an online digital folder that contains a record of activities related to the case, including tasks performed, decisions made, outcomes, documentation and evidence.

As each case progresses, relevant information is recorded under the following tabs:

- Employee information
- Case Details
- People
- Checklists
- Meetings
- Documents and Evidence
- Case Outcome and Decisions
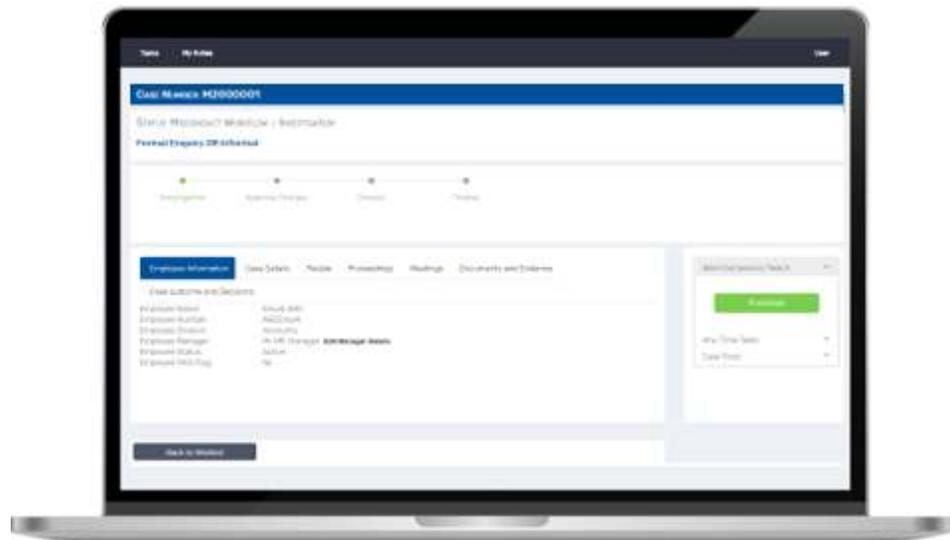
Pre-Configured Workflow

erNavigator's pre-configured workflow automatically moves each case through a series of pre-defined stages, contacting the appropriate end user at each point. The milestone indicator on the case file provides a visual overview of the workflow for that case.

The erNavigator workflow stages can be customized to match your organization's specific policy requirements or configured according to the best practice workflows provided by erNavigator.

At each stage in the workflow, erNavigator prompts the end user to complete all required tasks for that stage, based on the type of case involved and according to best practices for labor relations processes. For example, the workflow for disciplinary processes includes tasks for investigations, drafting of charges, preparing forms and documentation, meeting and inquiry procedures, and much more.

Tasks

The tasks required for each stage are located in the **Next Compulsory Task** section on the case file. The task label indicates what the task is.

When the Task button is clicked, a pop-up screen opens for the end user to complete the task. Clear instructions on how to perform the task can be accessed by clicking the **Take Tour** button.

Tour Guides are an online teaching tool that shows the end user step by step how to complete each task.

Once the task has been completed, these details are automatically recorded under the appropriate tab.

Depending on the workflow, the Task button will either be replaced with another Task button or with a **Stage Complete** message, indicating that all required tasks for that stage have been completed.
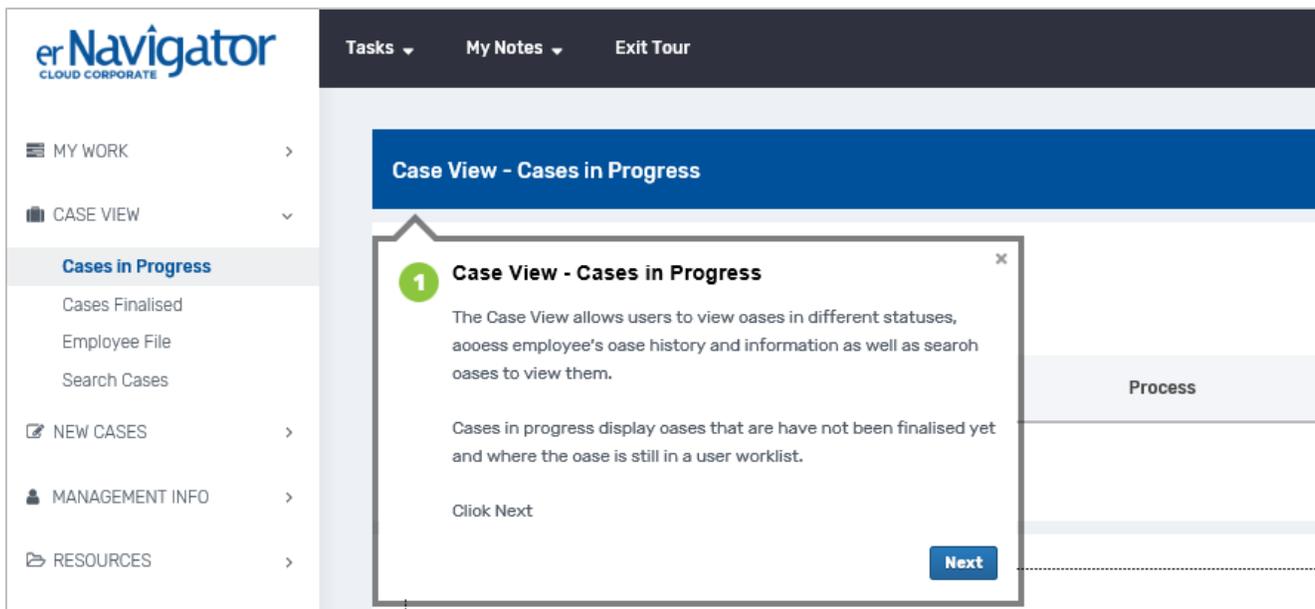
Once all required tasks are completed, a **Case Navigation** section appears at the bottom of the screen, detailing who will receive the case next.

Messaging

Email notifications will be sent to the next end-user to alert them that their attention is required. The workflow will also automatically move the case file to the **Worklist** on their erNavigator screen for easy access.

Knowledge Base

erNavigator maintains a comprehensive, regularly updated knowledge base comprising best practice processes and content including policies, law summaries, case law, information, forms, instructions and guidance. The knowledge base automatically interacts with the digital case file to present the end user with the information they require.