# CaseWorthy

## CaseBot

Have you ever wanted to add reports to your dashboards and have your own self-reporting tool?
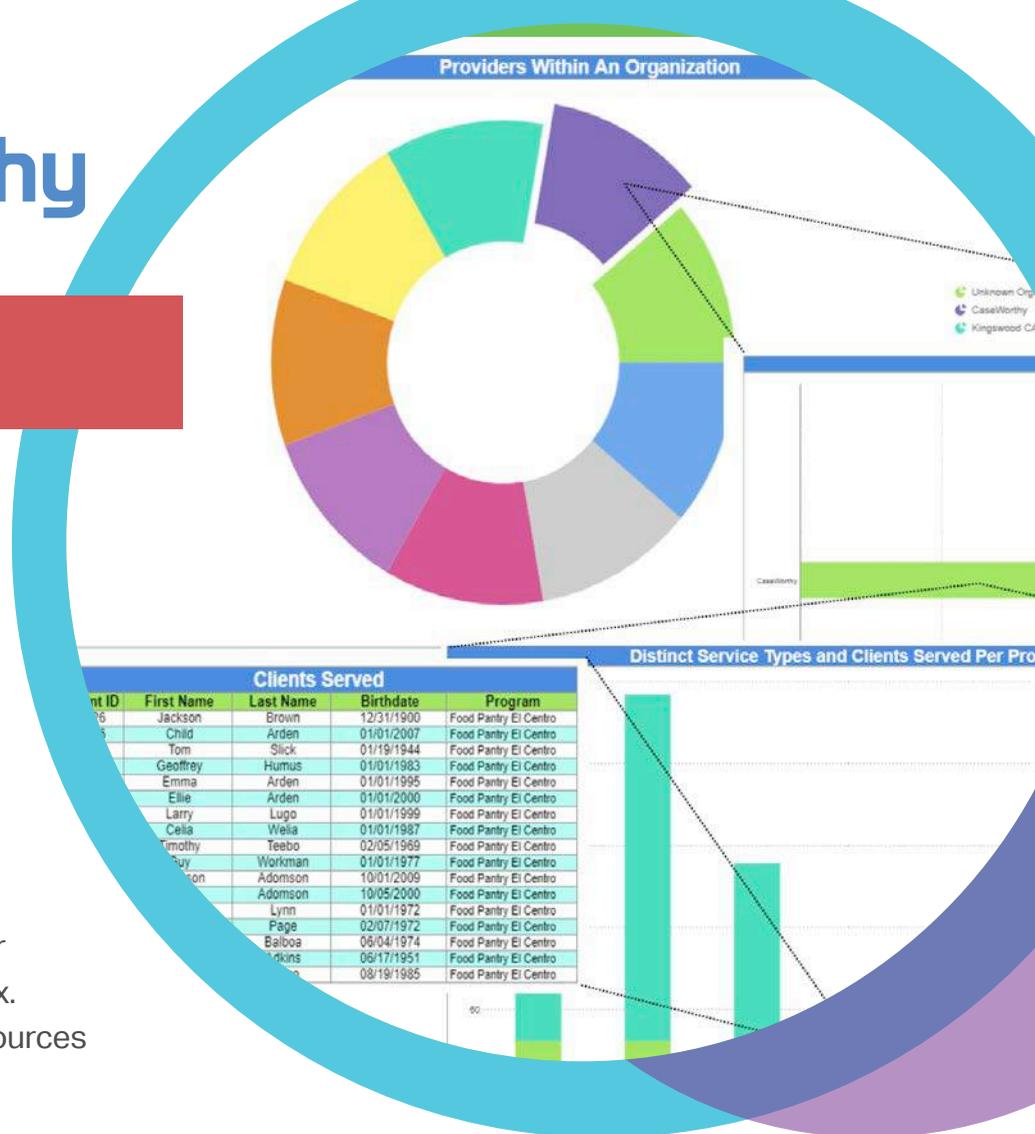
Now, with this unique business intelligence tool you can! Create your own reports – from simple to complex. No special SSRS know-how or IT resources needed!



## What this means for you:

- Complete control over your data
- Customize your reports and dashboards as much as you like
- Tailor the way you access and view your data from reporting to filtering dashboards and everything in between
- Enjoy the flexibility and easy to use self-service reporting tool

- CaseBot will bring so much more to the forefront with Dashboards and several options for report creation
- Express Reports – take less than a few minutes
- Supports smaller organizations in their reporting that don't have the IT experts to justify an overly complex reporting tool

The best BI technology comes at a price. But we're confident this investment will help everyone be more efficient in the work we do.

Once you're familiar with this new tool, we know you'll see the value right away. CaseBot simplifies report-building processes IMMENSELY, offering not-so-technical users the ability to create reports themselves.

# What you get with CaseBot:

- Easily drag and drop data to quickly build simple reports

- Build more complex reports using an Excel-like format

- Design and display multiple reports on your user dashboards

- Save and schedule your reports just like CaseWorthy's existing reporting framework

- You can now do PDF Mapping without the purchase of Adobe Pro

| KNOWLEDGE REQUIRED | ANALYTICS | SSRS | CASEBOT |
|---|---|---|---|
| Requires No MS SQL | ✅ | | ✅ |
| No SSRS Experience Needed | ✅ | | ✅ |
| Requires No MS Visual Studio | ✅ | | ✅ |
| No need to download DB to build reports | ✅ | | ✅ |
| No $500 fee for Adobe Pro | | | ✅ |
| Requires no PDX Export | | | ✅ |
| Requires Table and Table Relationship Knowledge | ✅ | ✅ | ✅ |

| FEATURES | ANALYTICS | SSRS | CASEBOT |
|---|---|---|---|
| Ability to display output to CaseWorthy dashboard | | | ✅ |
| Configurable in the CaseWorthy Application | ✅ | | ✅ |
| Scheduled Reports Feature | ✅ | ✅ | ✅ |
| Graphical Development Design Framework | | ✅ | ✅ |
| Allows for simple design and outputs | ✅ | | ✅ |
| Add formatting to reports (Text, font, colors, etc) | | ✅ | ✅ |
| Logic for Conditional Formation | | ✅ | ✅ |
| Uses Excel Pivot Table Style Output | ✅ | | |
| Exports to Excel | ✅ | ✅ | ✅ |

## KEY FEATURES

CaseBot offers a number of easy-to-use options to help you build your own reports, including:

### Express Reports

This is the easiest to use tool that provides a very simple report layout for exploring your data. Build custom quires, and then drag and drop the data you want to see in your reports. Easily add visual effects like charts, change the sort order, and apply filters – all based on the queries you built. This is a great starting point, which you can then use to create more advanced reports.

### Advanced Reports

The advanced option offers a bit more fine-tuned control over your data and a lot more functionality in terms of calculations, formulas, and conditional formatting. An Excel-like grid format allows you to easily add or hide columns and rows, merge cells, and insert formulas, and charts. Take advantage of a Crosstab Wizard to create complex tables with summary results grouped in rows and columns. Like with the Express option, you can change sort order and filters to pull out the data you want to see.

### Charts and Graphs

Choose from an assortment of charts and graphs to display your data. If you need help, a Chart Wizard can walk you through the setup process. Simply decide which chart type and select the data you want to see. Link together an unlimited number of charts in any order to drill down, up, or sideways through your data.

### Report Outputs

You have several reporting formats to choose from, including PDF, RTF, Excel, HTML, and CSV. Simply select your desired format from a dropdown menu. When you're finished building your report, save it or schedule it to automatically be sent out to your team members.

### Customization

The best part? Your report layouts are never set in stone. Anytime you want to make changes simply go in and make them – no submitting a request to the busy IT department and waiting for it to get done.

## Templates

CaseBot makes it easy to populate your pre-defined forms with data from your queries. Automate the process of merging data onto pre-formatted PDF, RTF and Excel templates, like W-9 forms, invoices, intake forms, and more.

### Why CaseWorthy

Every business benefits from smart alliances. When you team up with CaseWorthy, you get a comprehensive solution to help you securely capture and report on your data while meeting all security and compliance requirements. Plus, we provide the expertise and training you need to successfully manage your customized solution from planning to implementation and beyond.

## Benefits

### Simplify the report-building process.

Now you have the tools at hand to easily create and modify simple reports on your own. No SSRS knowledge or IT resources needed. Design your reports and dashboards to display what you need to see – when you need to see it.

### Save time and money.

Eliminate the need to submit an SOW, agree to terms, and go through the development process to get the reports you want built. You have the power to create the reports and access the information you need almost instantly.

### Update and customize reports yourself.

Because you create these reports yourself, it's easier than ever to update, add enhancements, and customize them as much and as often as you like. No need to go through the development and approval process, waiting for your change request to be completed.

CaseWorthy

To learn more about how the CaseBot report builder tool can benefit your organization, contact a CaseWorthy representative at

## 877-347-0877
### or visit www.CaseWorthy.com