



Vertafore™
Unleash your potential

ImageRight Enterprise Workflow

Factsheet

About Vertafore

Vertafore is the leading provider of software, services, and information to the insurance distribution channel including independent agents, brokers, MGAs, carriers, and reinsurers. Vertafore leverages a unique industry presence to deliver meaningful solutions, powerful technology, critical information, and robust insights to help organizations effectively respond to business challenges and capture new opportunities. Vertafore solutions have helped more than 15,000 customers and 200,000 users gain competitive advantage to accelerate their business performance.

Why Vertafore

Vertafore brings together a family of connected technology and information solutions, enabling us to provide clear paths to competitive advantage and growth for all our customers. Vertafore is committed to helping our customers capture opportunities for increasing productivity, efficiency, ROI and growth – unleashing the full potential of their business. Vertafore solutions connect agencies, carriers and MGAs to work together towards a common mission to grow the bottom line and better serve the needs of their clients.

The Vertafore Team

- Privately-held by JMI Equity and Hellmann & Freidman LLC
- 1100+ Employees
- 43% of employees focus on R&D
- 30% of employees focus on implementation and support
- Deep insurance expertise
- Commitment to client success

Vertafore

Carrier & MGA Markets

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Insurance is transaction intensive—submissions, quotes, policy issuance, endorsements, billing, loss notification, payouts—and you have systems in place to help manage each and everyone.

Transactional systems provide their own efficiencies. They do nothing to streamline the entire organization's workflow, tie transactions and content together, and provide you the visibility into your enterprise's processes to better manage and thrive in an increasingly competitive marketplace. ImageRight Workflow unifies policy, claims, and billing processes in a single, uniform level of business logic. Opening a task in ImageRight automatically opens and displays the complete file associated with the task.

The ImageRight Workflow Definer is the graphical programming tool that enables the development and maintenance of workflows. The Definer is used to replicate your business processes. It can manage various procedures involving simple or complex steps, where decisions, stored queries, updates, and indexing are involved. The design and maintenance of complex workflows is streamlined by using component levels. ImageRight allows you to have multiple tiers of workflows that can be called from others. The ImageRight workflow system can connect to any ODBC compliant data source and retrieve or update information in existing systems, populate forms, or drive criteria based decisions.

ImageRight Enterprise Workflow features:

- An integrated To Do List allowing users to:
 - Request a list of tasks
 - Narrow the list to a specific step within a flow
 - Request tasks based on priority, regardless of what step or flow they are in
 - Reassign tasks to others
 - Browse the first page of the document prior to opening the task to be processed
 - Sort the tasks based on different patterns, even customizable patterns
- The ability to monitor each co-workers' tasks when someone is out of the office
- Security at both workflow and step Level
- Automatic criteria-based and manual routing
- External data connectivity
- Intelligent, fully automated steps enabling straight through processing
- Diary Creation
- Parallel path processing to allow concurrent work
- The power to create tasks into any step of any flow
- Deadline checks
- Automated workload balancing
- Full integration with ImageRight's Business Process Intelligence tool for management and reporting