

# Enterprise Correspondence Management

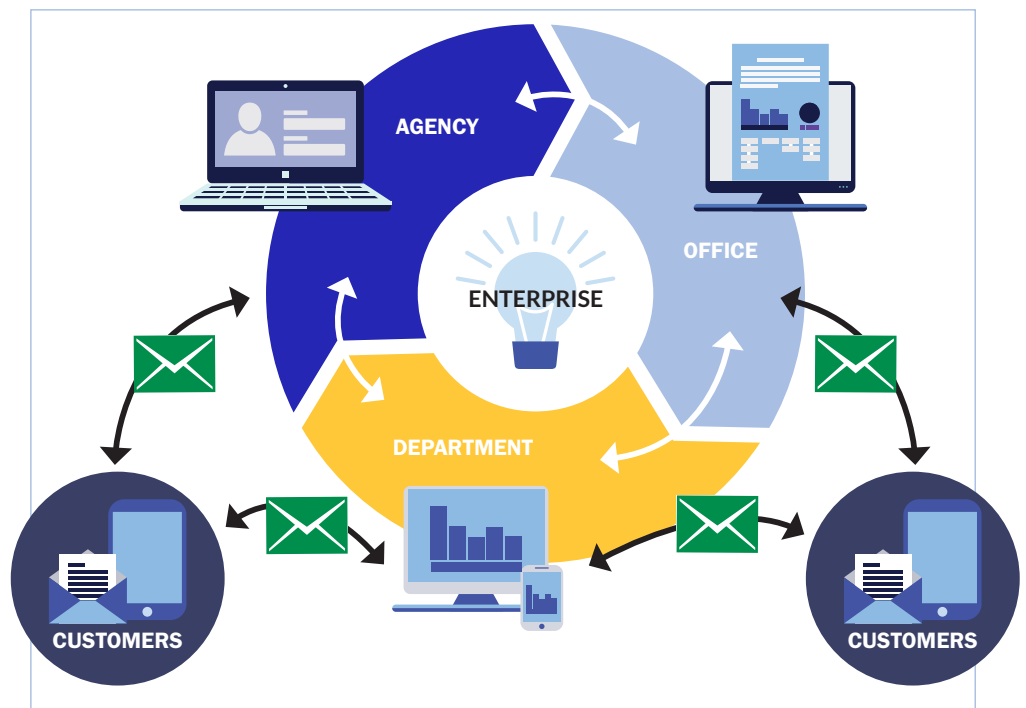
## KEY BENEFITS

- **Assign tasks** and route documents for review and approval.
- **Track and monitor** the entire lifecycle of a correspondence document from the time it is received to the time final responses are sent out or the case is closed.
- **Create standard** reports to track pending, overdue and completed actions and create ad hoc reports with customized criteria.
- **Swiftly collaborate** between users in disparate locations in real time by means of discussion threads.
- **Maintain** all documents in the organization's selected repository such as Sharepoint or Documentum.
- **Avoid error** and confusion in multiple drafts by means of version and source control.

## Powerful Correspondence Management

Large businesses, regulated industries and government agencies receive and must adequately handle thousands of forms of correspondence. Responding appropriately and within time constraints is increasingly becoming a major concern for organizations. This problem is magnified by the wide variety of correspondence organizations receive, all of which must be processed according to their unique requirements, standards and workflows.

eCase Correspondence Management is a workflow-driven application designed to meet all of your office's correspondence and processing needs. Electronic folders with flexible workflows tailored to your organization's business processes allow you to electronically interface with members of your organization for efficient correspondence processing.





## eCase Features:

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### The Workflow Engine

Using the eCase workflow engine, workflows are configured to provide a step-by-step routing chain for information depending on tasks associated with specific cases. Both simple and complex workflows can be supported with conditional routing to accommodate decision logic and approvals in the organization.

### Powerful Configuration Options

eCase Correspondence is constructed from the ground up to provide robust configuration options to match your specific correspondence needs. Thus, eCase can grow with you as these requirements change. eCase allows you to easily modify or add fields, labels, forms, reports, and workflows to suit your specific business processes.

### Security: Roles and Permissions

eCase provides various levels of access control; permissions change depending on the role of the user. The administrator of the system can create multiple roles and set permissions to different roles based on different users' functions in the business process. Permissions can also be set at the group level and when a new user is added to that group, they inherit all permissions pertaining to that group. A user will only see eCase functions in the graphical user interface for which their role/group has correct permissions to access.

### Correspondence Templates: Form Letters

To further expedite the correspondence process, eCase provides tools to create and save frequently used form letters. When a template is used for correspondence, it auto-populates with sender/recipient specific information, provides an opportunity for further customization by the user, and is sent directly from the case screen. Save and share your most useful templates within your organization.

### Ease of Collaboration

In eCase users can create discussion threads within individual cases. When there is a new post in the thread, those assigned to the case receive an email notification to check the thread. This feature facilitates internal communication and collaboration.

### Comprehensive Auditing and Reporting

eCase Correspondence provides unalterable audit trails that track all user actions in the system. In addition, eCase provides both standard and ad hoc reporting. Reports can be shared with other users and groups who in turn, have the additional flexibility to modify the report criteria, add filters, sorting and column options. Reports can be emailed to other eCase users, external recipients, and scheduled for automatic generation and delivery.

OPEXUS is a leading global provider of cloud-based, adaptive case management solutions. Since 1988, OPEXUS has empowered more than 380 organizations in 45 countries to rethink how they work, develop and deploy new technology. OPEXUS innovative, agile software and services spur digital transformation across the enterprise.