



OpenText Correspondence Tracking

For public and private sector organizations

OpenText Correspondence Tracking extends the capabilities of the OpenText Enterprise Content Management (ECM) Suite with a comprehensive offering to support the capture, tracking, and management of correspondences and related administrative tasks.

Benefits

With OpenText Correspondence Tracking organizations can:

- **Improve customer service** with quick action and informed responses
- **Increase productivity and reduce cost** through automated processes, increased transparency, and improved response capability
- **Reduce risk and assure compliance** by eliminating missed deadlines through increased controls
- **Guarantee security and privacy** of information at all levels of your organization
- **Decrease operating expenses** by eliminating the need for physical storage of documents

OpenText Correspondence Tracking helps both public and private sector organizations track and improve coordination and communication for incoming correspondence. The solution extends the capabilities of the OpenText Enterprise Content Management (ECM) Suite with a comprehensive offering to support the capture, tracking, and management of correspondences and related administrative tasks.

Organizations can use this solution to ensure that the necessary response has been made, determine how long it took to respond, and what the response contained. OpenText Correspondence Tracking incorporates incoming and outgoing correspondence tracking processes into a single, automated, customizable workflow, including processes to obtain proper reviews and secure authorized signatures. All manner of communications are tracked and stored—from emails, faxes and letters to notes recorded from telephone calls. Customizable forms collect organizational-unique metadata associated with each correspondence. All correspondence-related information is maintained in a centralized dashboard for secure and easy access.

Centralized processes, consolidated information

OpenText Correspondence Tracking gives organizations a central place to manage communications that can be integrated with processes to incorporate all people involved in a response. Powerful, easy-to-use search templates based on the meta-data make it easy to find and manage information without having to hunt through multiple files, folders, computers, or networks. Time spent retrieving information or recalling files from offsite storage is all but eliminated. Simplified administration enables the lead office to automatically route assignments to coordinating individuals and/or groups (those whom input for the response may be required). Correspondence responses can be efficiently managed with multiple task assignments performed and routed in parallel.

OpenText Correspondence Tracking eliminates the need to keep separate document logs or correspondence tracking systems; information only ever needs to be captured once. Anyone with access to the system can handle customer requests, resulting in questions being answered much more quickly. Duplicated efforts and errors based on manual, paper-based systems are reduced. A consistent correspondence tracking process lessens time spent on administrative tasks, improving productivity today and accessibility of information well into the future. OpenText Correspondence Tracking, combined with a digital repository, decreases operating expenses, improves customer service, and ensures regulatory compliance.



Ensure the effective capture, tracking, storage, and management of correspondence in any format, from incoming to outgoing

Features

OpenText Correspondence Tracking includes the following features:

- Built on the OpenText ECM Suite, taking advantage of the full power and scalability of OpenText's flagship product.
- Incorporates OpenText ECM users, groups, and permissions—including a role-based permission model that supports 7 roles and 8 permission types.
- Directory Services can be used to synchronize Users and Groups from Active Directory. The solution can also be configured to support single sign-on.
- A Correspondence Dashboard that provides a single view for one-click access to Inbox, Management, Search, Report, and Administration features.
- Supports multiple correspondence types (i.e. business processes) via the ability to configure an additional form to capture the metadata and an additional workflow to automate the required process steps.
- Supports parallel coordinating office participation in the response process.
- Users can easily create and/or view references to existing correspondence that is related to the one currently being worked eliminating the need for the same (or similar) response to be re-written from scratch for multiple inquiries.
- Metadata corresponding to workflows, attachments, and correspondents is maintained in configurable forms that are associated with the workflow. Virtually all form fields can be customized.
- All tasks are managed effectively, taking into account working days and holidays.
- Users can search for current and past correspondence by using the "Search" tab. Preconfigured search templates are based on the correspondence form attributes.
- Preconfigured report templates provide information on current or past correspondence.
- An Administration Dashboard provides a single view for one-click access to all configurations pages necessary to implement the solution.
- Integrated scanning solutions allow scanned documents to be easily managed in OpenText ECM. Text created by OCR is stored (and indexed) with the scanned image, allowing for full text search of scanned images.
- An Optional DoD 5015.2 Records Management feature is available for managing incoming and outgoing correspondence as official records.

For more information, visit: <http://www.opentext.com/2/global/solutions/sol-gov-home.htm>

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