

360° CORRESPONDENCE MANAGEMENT

The management of incoming and out-going correspondence is an important part of all document management and is therefore a core process supported by 360°.

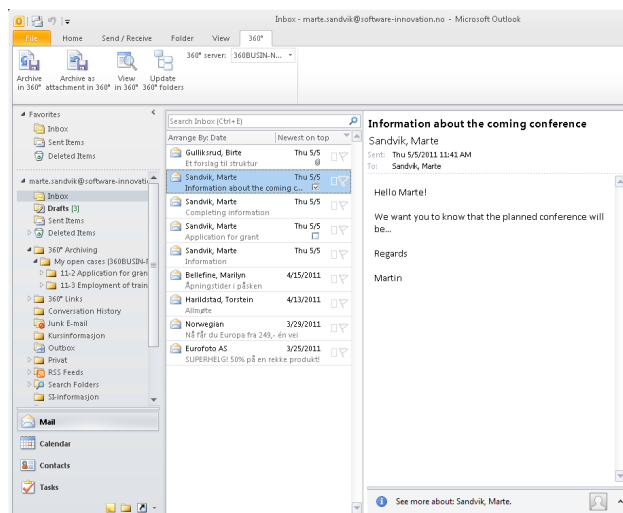
In its simplest form this means that employees save important documents and emails they have received from or sent to customers, suppliers and partners. In its more advanced form, it can refer to processes to distribute, manage and respond to incoming emails in a formal and controlled way, or the initiation of a complete case process, for example as an application, complaint or incoming recommendation.

360° Correspondence Management is based on a pre-defined configuration of metadata for documents, based on best practice standards such as ISO. At the same time, 360°'s data model ensures that documents can be linked easily to contacts (senders and recipients), cases, projects and activities, and can be stored in 'virtual folders'.

Simple storage of incoming mail

Correspondence can arrive at an organization or business as a letter or an email. 360° includes functions for simple and efficient management of both types of correspondence. A letter with enclosed material can be scanned in and simultaneously translated by one of the 360° scanning modules using optical character recognition (OCR).

Incoming emails can be saved easily from Outlook into 360°, either manually using the menu option 'Save in 360°' or by dragging and dropping into 360° case and project files in Outlook. The Outlook integration in 360° also makes it possible to set up automatic transfer of emails to these folders using Outlook's 'rules'. The user is notified at the time of storing if an email has already been saved by someone else, which prevents unwanted duplication.



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Templates and standard content for outgoing emails

When outgoing documents are produced, 360° offers support for integrated document templates and set-up of standard content. This ensures that all documents have a unified presentation, as well as ensuring that metadata can be imported easily into the email.

A number of standard templates are included in 360°, but the organization can also create its own templates using the 360° Template Designer tool. Fields in templates can also be defined to allow automatic updating of metadata when changes are made to the 360° document. The functionality for standard content means that the organization can establish a standard phrase library that individual users can easily include when writing documents.

Integrated records management of outgoing emails

By using the standard function for responding to an incoming document by email or by initiating an email from a contact, case or project in 360°, the outgoing email will be saved automatically in 360° and linked to the contact, case or project. This creates a comprehensive overview.

Overview of correspondence

Whether the user scans physical documents or saves emails, the documents will always be linked to correspondence items as well as cases and projects. This offers a simple overview of all incoming and outgoing correspondence with a customer, partner or supplier or within a project or a case. It is important to note that each letter or email can have multiple links of this type, without duplicates being created.

Connection between enquiries and responses

While all correspondence can be linked to correspondence items, cases or project folders, it may be desirable for users to keep an overview of which enquiries have been answered or handled. This also allows users to monitor any backlog and to link incoming and outgoing documents. This is why 360° Correspondence Management also has functions to 'respond' to incoming emails and letters; by selecting the 'respond' command for an incoming document, the system 'flips the registration'. This involves initiating a new document registration based on the metadata of the incoming correspondence, in which these two registered documents are linked as 'enquiry and response'.

With this connection, users can avoid re-registering metadata and it becomes easier to review the connection between enquiries and outgoing responses. Backlogs can be monitored easily because the user can see which incoming documents have not been linked to an answer or handled in an alternative way (marked as 'for consideration' etc). The application offers reports and search options that give this type of overview.

The screenshot shows the 360° software interface. At the top, there is a navigation bar with 'Home', 'New...', 'Search...', 'Functions', and 'My library'. Below this is a sidebar with a tree view containing 'Contact', 'Project', 'Case', and 'Document'. The main content area displays a list of documents for the contact 'Callingers cars'. The list has columns for 'Doc. number', 'Title', 'Date', 'Document type', and 'Responsible person'. The documents listed are:

Doc. number	Title	Date	Document type	Responsible person
11-1	Information about the delivery	04.05.2011	Outbound document	<input type="checkbox"/> Marte Sandvik
11-3	Information from Fujitsu	04.05.2011	Incoming document	<input checked="" type="checkbox"/> Marte Sandvik
11-8	Statusreport	04.05.2011	Outbound document	<input checked="" type="checkbox"/> Marte Sandvik
11-12	Questions	04.05.2011	Outbound document	<input checked="" type="checkbox"/> Marte Sandvik
11-18	News from Software innovation	04.05.2011	Outbound document	<input checked="" type="checkbox"/> Marte Sandvik
11-19	Agreement of collaboration	04.05.2011	Outbound document	<input checked="" type="checkbox"/> Marte Sandvik
11-25	Letter of recommendation	04.05.2011	Outbound document	<input checked="" type="checkbox"/> Marte Sandvik

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Follow-up of deadlines, workflow for circulating documents and approval

In 360° Correspondence Management there is also functionality for defining deadlines and options for notification when you are assigned a new task, for example to deal with an incoming letter. Incoming documents can be distributed to others for their information or for review, using built-in workflow functions.

An outgoing document can be formally circulated for approval before being dispatched and sent to an external recipient. This means that formal processes can be completed electronically and logged in the system, according to the desires or needs of each individual organization.

Integrated processes for the formal management of correspondence

360° Correspondence Management can be used as a simple application for the storing of incoming and outgoing documents linked to contacts or people. However, the module also has functionality for completing the formal 'case management' of incoming correspondence, with a focus on following-up deadlines, backlog management and formal procedures for approval and dispatch. These can be combined according to the organization's needs and legal requirements. The application is flexible and is not bound by fixed routines and management processes.

An integrated formal process for managing incoming correspondence could, for example, be completed in the following way:

An incoming letter is scanned and registered in a document center and distributed to the correct department. The appropriate person in the department then assigns the document to the employee who will manage and potentially respond to the letter with an outgoing letter or email.

During this process, different document types are registered and generated, with relevant characteristics and metadata such as status and responsible case handler. For example, it is the incoming document that initiates the process, while the outgoing document sent in response is the final stage. Documents will have different statuses depending on where they are in the correspondence management process.

From the desktop, the logged-on user has access to a range of different task lists for easy access to documents that need follow-up. Incoming documents that have been assigned to the logged-on user are shown in one list, while documents that are in progress are shown in another.

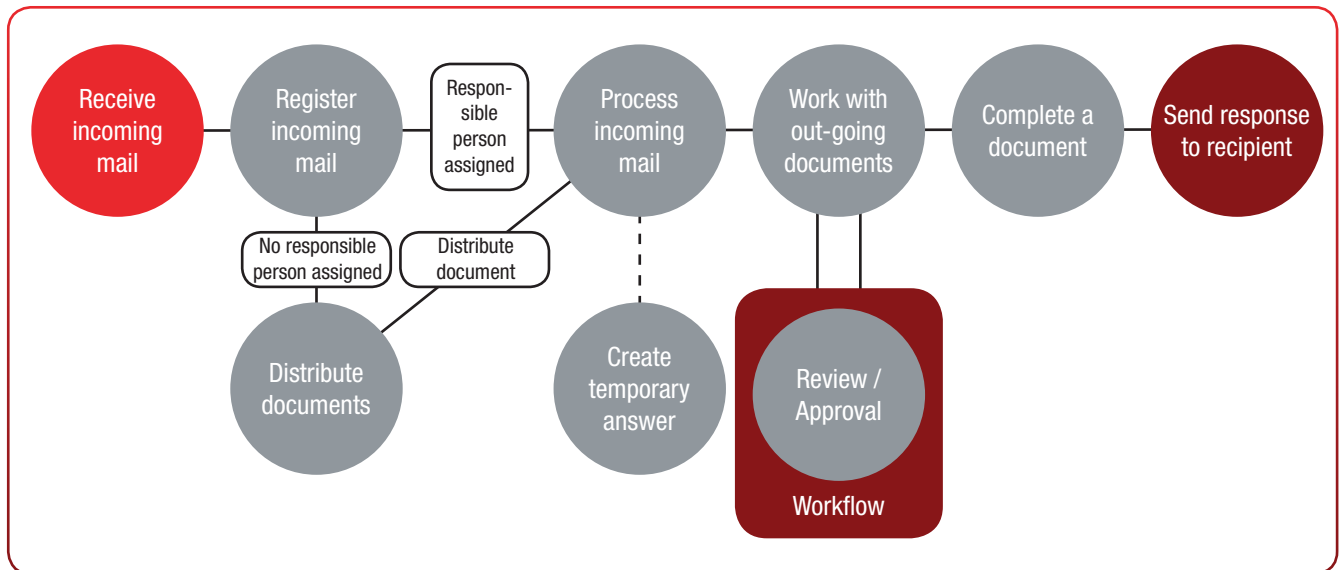


Illustration shows how a formal correspondence process might look, from receiving a request or notice, to distributing, to processing and lastly, sending a response.

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During this process, when the documents are registered, distributed, and characteristics such as status and responsible handler are changed, the documents are shown in the relevant users' task lists. This drives the process forward, from the moment the enquiry arrives, until a response has been approved and dispatched.

A pre-defined application with customization options

360° is supplied with pre-defined document profiles, framework and rules as well as customized desktops for different user types (roles). The desktop and functions include task lists, searches and overviews based on best practice management of correspondence. It is easy to adjust and configure the application as needed.

Requirements

360° Correspondence Management is available for both 360° for Business and Public 360° (in the latter as an integrated part of the support for case and records management).



Software Innovation is a Scandinavian company and a leading international software vendor for document control, information and case management. With 25 years of experience and competence in business-oriented content applications, we are committed to delivering future-proof, flexible and highly user-friendly solutions for our customers and partners. Our application suites create excellent information sharing, efficient collaboration, business control and improved service for both private and public organizations. The packaged business solutions are built on Microsoft SharePoint and Office, the market leading platform for collaboration and business productivity.