



# everteam

Correspondence and  
Tracking System

July 2019

# Introducing Everteam

Over 25 years of ECM and BPM Leadership



**12**

Subsidiaries



**25+**

Countries



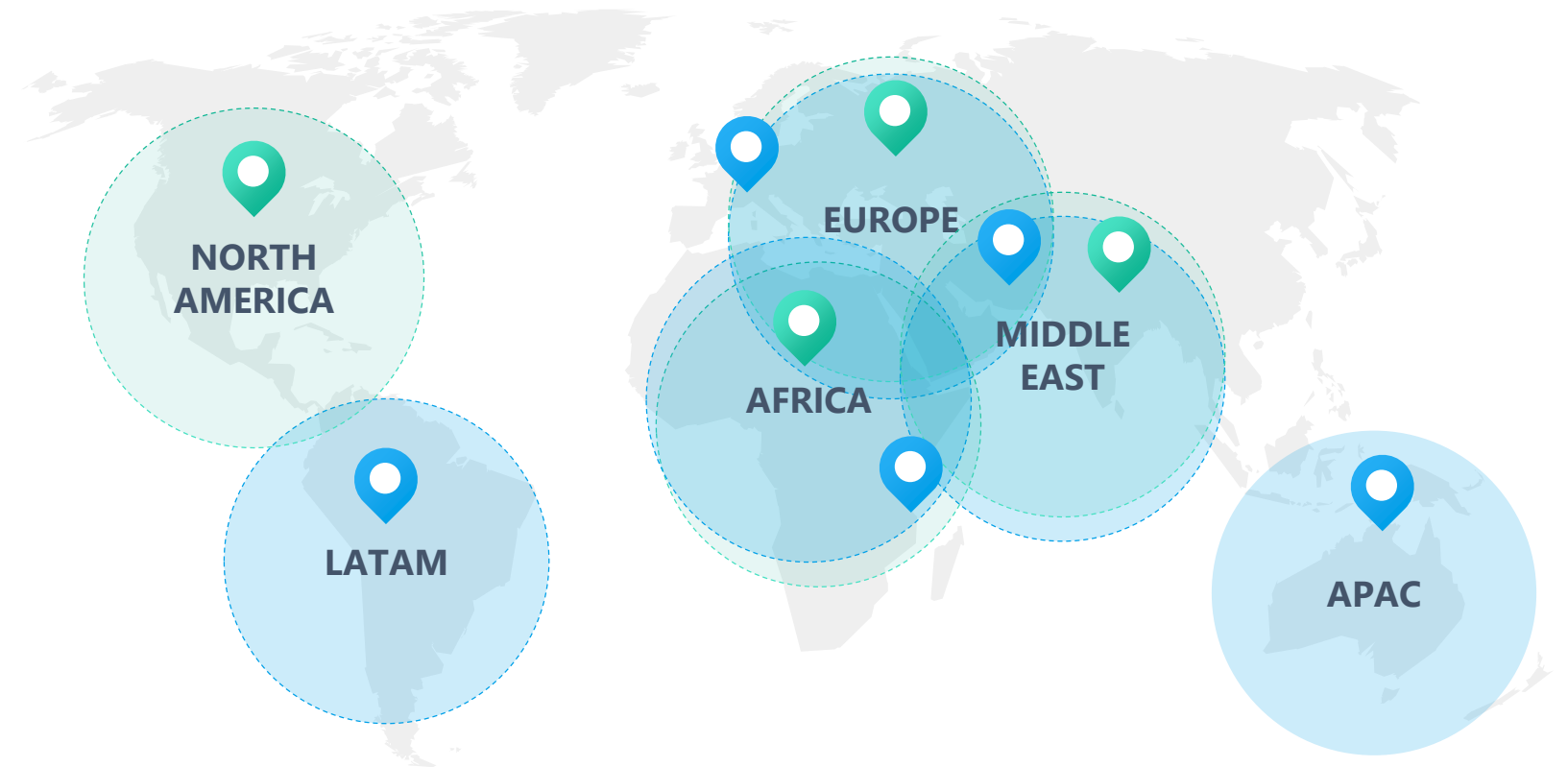
**3000+**

Customers on Five Continents



**~1000**

Employees Worldwide



Our offices



Our clients

# AGENDA

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What is CTS?

2

Initiation

3

Processing

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Archiving

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Key Benefits

# What is CTS?

- A completely integrated and fully web solution based on Everteam state of the art.
- Innovative solutions that uses and leverages Artificial Intelligence and Machine learning
- A robust application for automating correspondence files in a manageable and organized way
- Embedded capture capabilities, supporting both paper-based and electronic documents

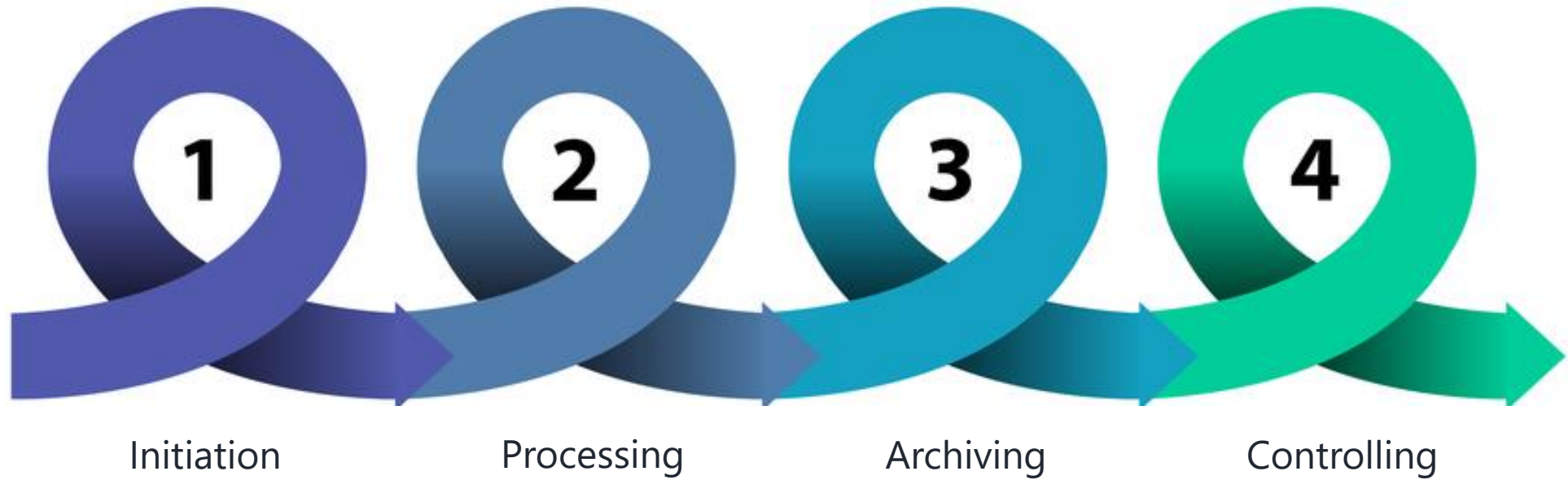


# Organizational Challenges

- Manually file and organize huge amounts of paper documents
- Time Consuming process of manually reviewing, commenting, approving and dispatching correspondences
- Management Limitation due to hard monitoring & Decision Making
- Lack of information and availability
- Deficiency in reports and dashboards
- Needs of security and compliance regulation

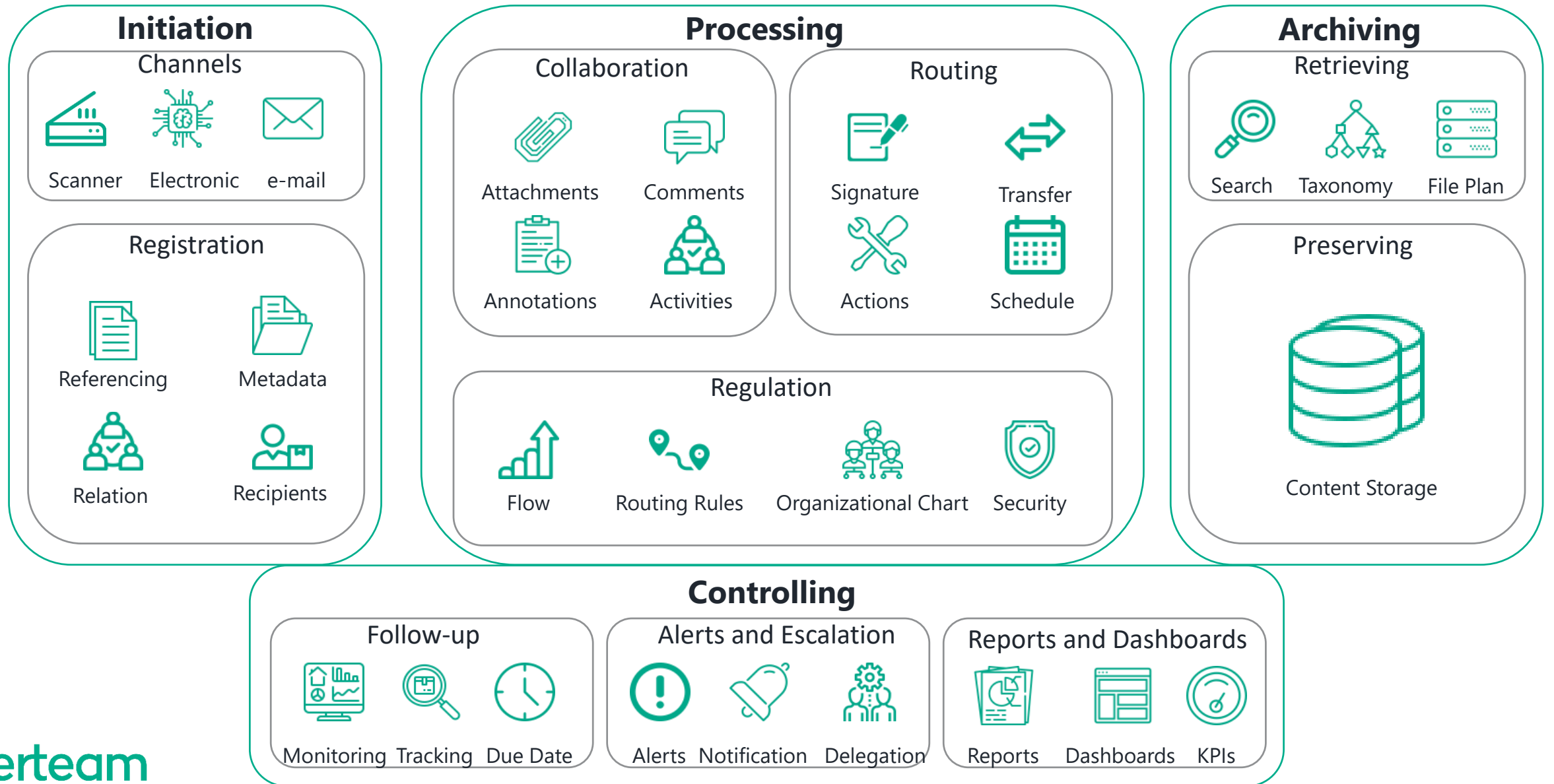


# CTS Lifecycle





# The Big Picture



# AGENDA

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Initiation



# Initiation Phase

## • Channels

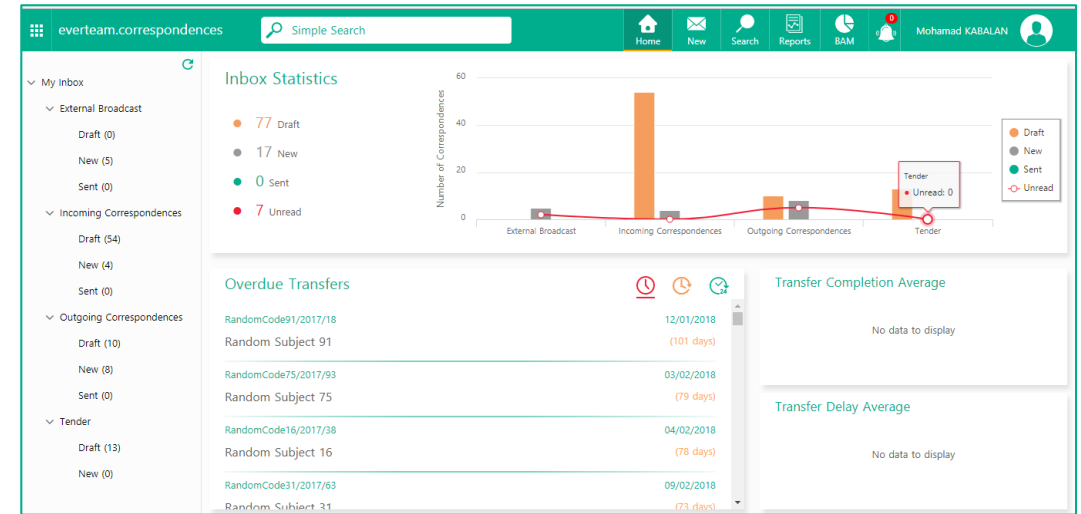
- Scanner: data creation by scanning documents, files...
- Electronic: upload documents, files from the web.
- E-mail: initiate from incoming, outgoing or internal correspondences

## • Registration

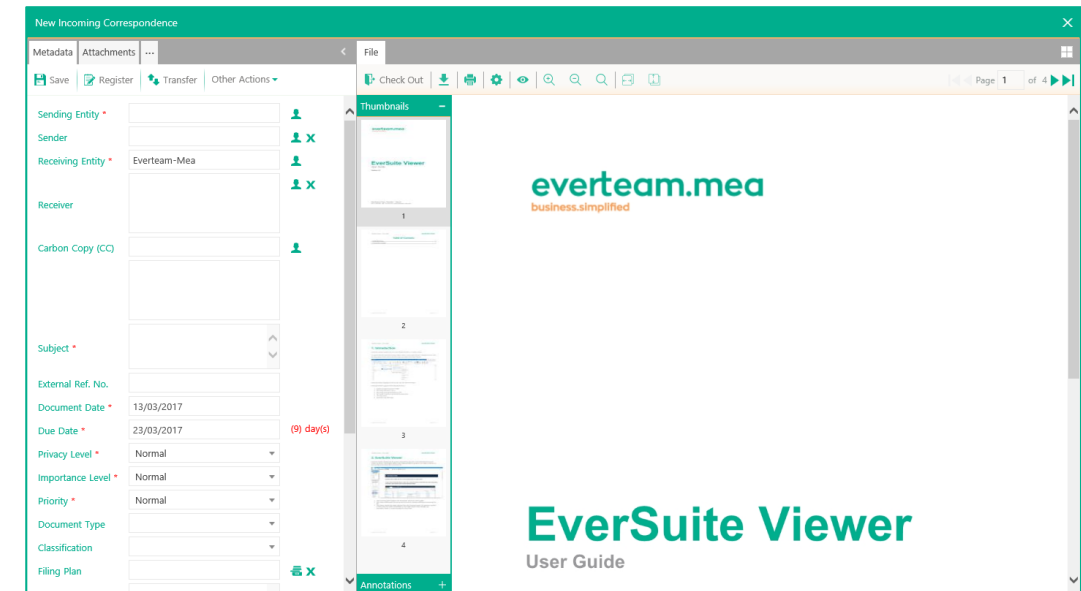
- Referencing: add reference number to document, email or file.
- Metadata: add description or related info to a document, email or file...
- Relation: identify relation between different users.
- Recipients: receivers of a document, email, file...



Navigation Pane



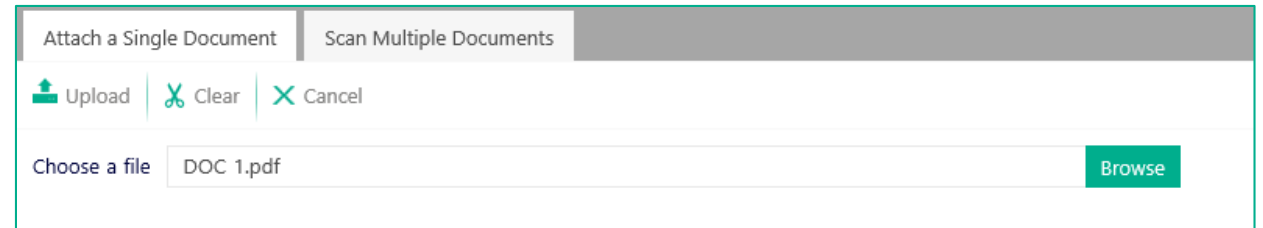
CTS Home Page



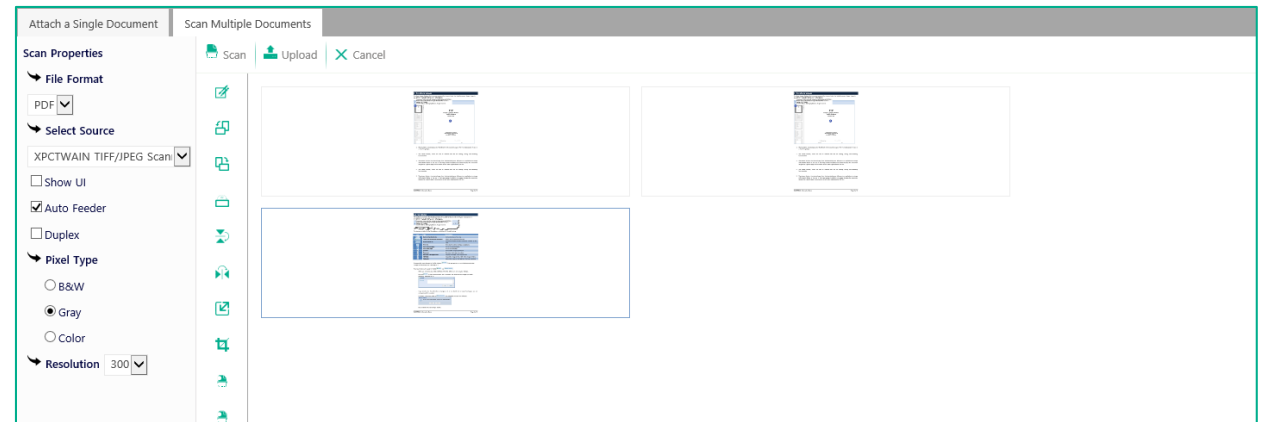
Metadata

# Capture & Document Viewer

- Ability to record the incoming correspondence metadata.
- Capturing feature consists of:
  - Attribute tab
  - Original mail tab
  - Attachments tab
  - Linked mail tab
- Upon capture, images are loaded in evertteam. Viewer with a wide array of functions.



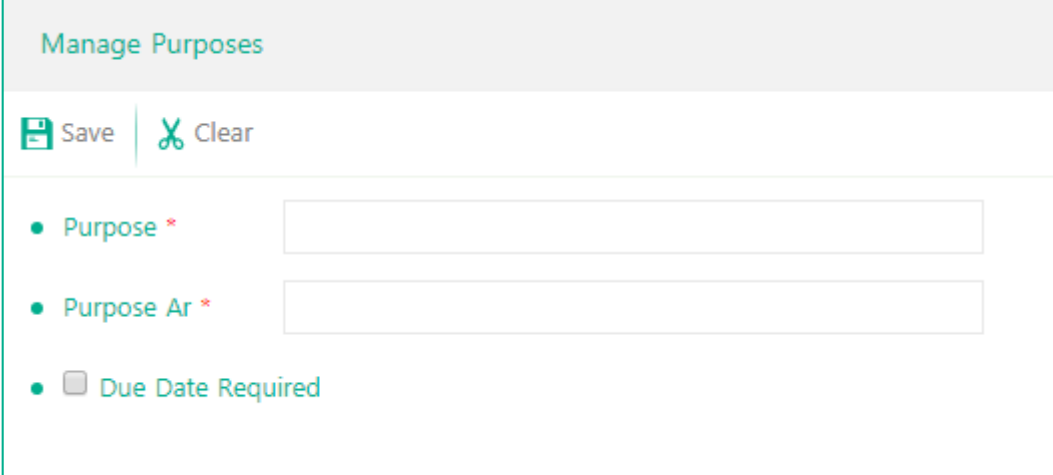
Upload Electronic Documents



Scanned Document

# Administration Module

- Ability to automate and facilitate multiple administrative tasks, such as:
  - View Departments
  - Department Users
  - Manage Correspondence
  - Manage Out of Office
  - Manage Purposes
  - Manage Template

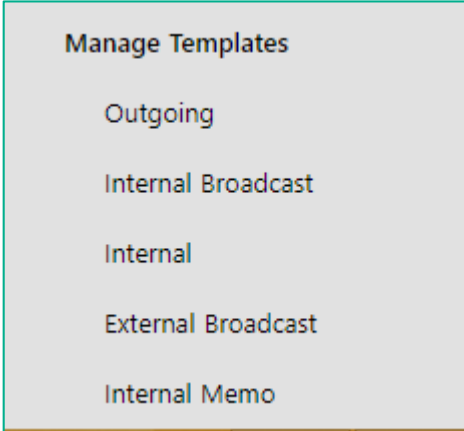


Manage Purposes

Save | Clear

- Purpose \*
- Purpose Ar \*
- Due Date Required

Correspondence Purposes



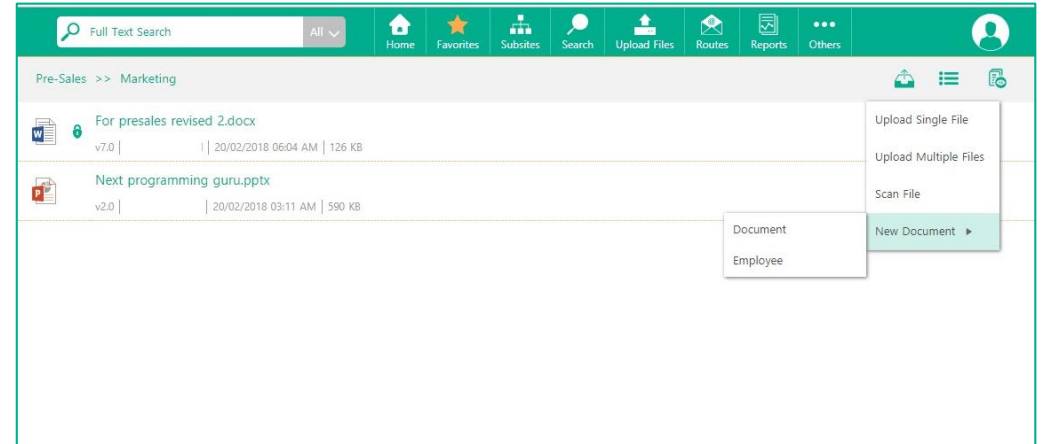
Manage Templates

- Outgoing
- Internal Broadcast
- Internal
- External Broadcast
- Internal Memo

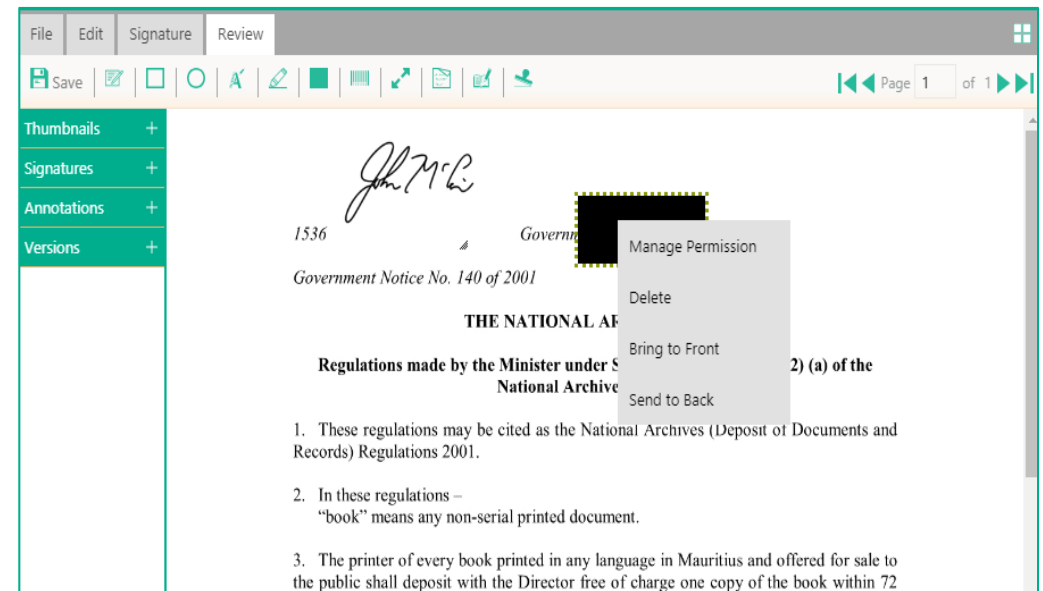
Templates

# Collaboration & Template Based Generation

- Scan or Attach documents related to the initial correspondence
- Link Incoming and Outgoing correspondences
- Add public and private comments on correspondences using advanced editing tools
- Ability to perform several image processing operations, such as zooming, rotation, noise processing, image cleaning, etc...
- Add annotations and assign security privileges to view and print them.
- Create correspondences from predefined templates
- Generate Outgoing correspondences from incoming correspondences
- Create public and private templates
- Automatically generate cover pages.
- Ability to generate envelope labels from custom templates.



Template Based



Blackouts

# Multiple Input Channels & Barcode Generation

- Scan or upload electronic documents
- Organize documents into electronic folders
- Attach documents to correspondence tree
- Work with various types of correspondences: Incoming, Outgoing, Internal, Memos, Announcements etc...
- Customizable barcode settings (format, size, font text, etc...)
- Automatic barcode generation
- Ability to print barcode label
- Automatically embed barcode on the first page of the document.



Barcode

# AGENDA

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Processing



# Processing Phase

- **Collaboration**

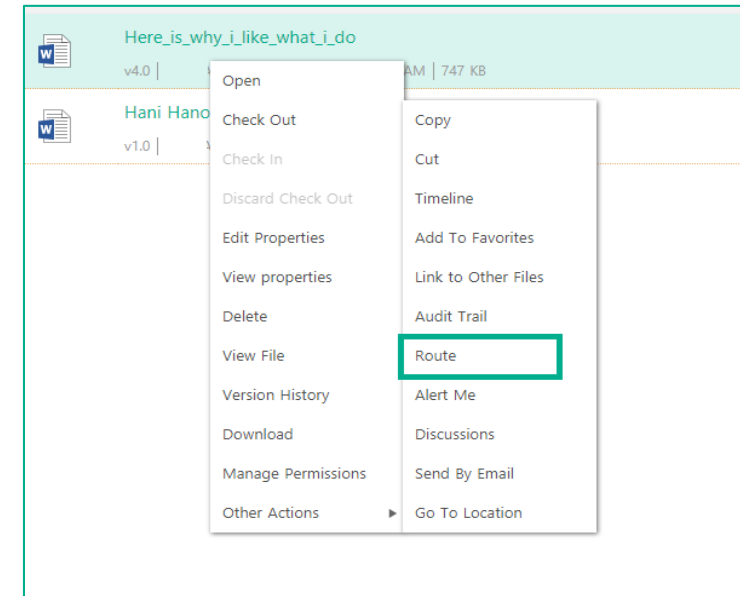
- Attachment: attach file, image, video...
- Comments: add comments to a file, image, document...
- Annotations: add note to location, file, document...
- Activities: manage users activities.

- **Regulation**

- Flow: manage the flow of information
- Routing Rules: control workflow between tasks in process
- Organizational Chart: organize the structure of the organization
- Security: preventing unauthorized access, use, modification...

- **Routing**

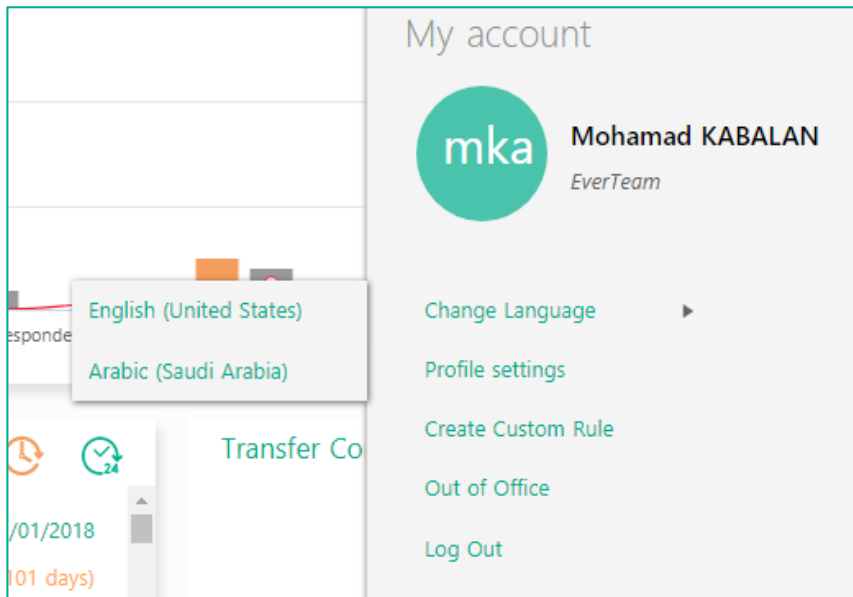
- Signature: add digital signature
- Transfer: transfer tasks, email, files from person to another, internally and externally.
- Actions: making decisions, approval, rejection...
- Schedule: schedule tasks



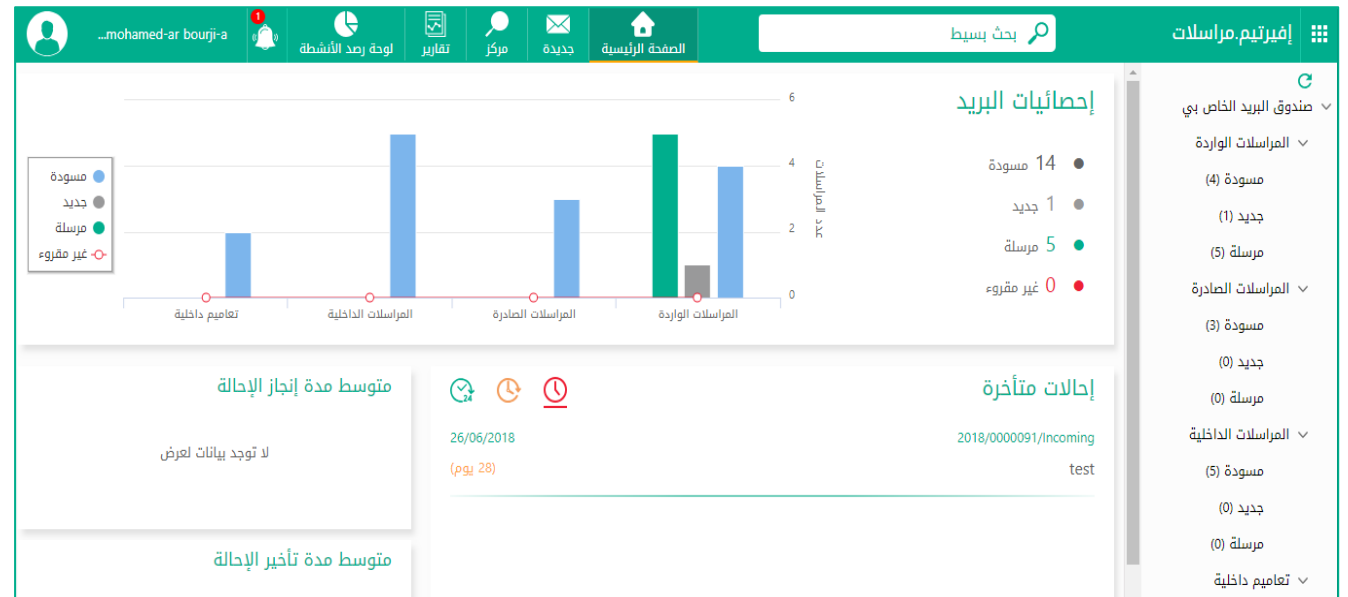
Routing

# Multiple Languages

- Ability to change between different languages to set based on the needs and education.



Select Language



CTS in Arabic

# Custom Rules

- Ability to fully customize the profile, add and edit personal information and many other settings.
- Ability to create new nodes and filter their correspondences based on specific criterion of their choice, it could be by Contact, Department, and Purpose...etc.

Create Custom Rule

Save Clear Cancel

Folder Name \*

Folder Name Ar \*

Root Folder \* Incoming Correspondences

Received From Structure

Received From Contact

Purpose

Priority

Privacy Level

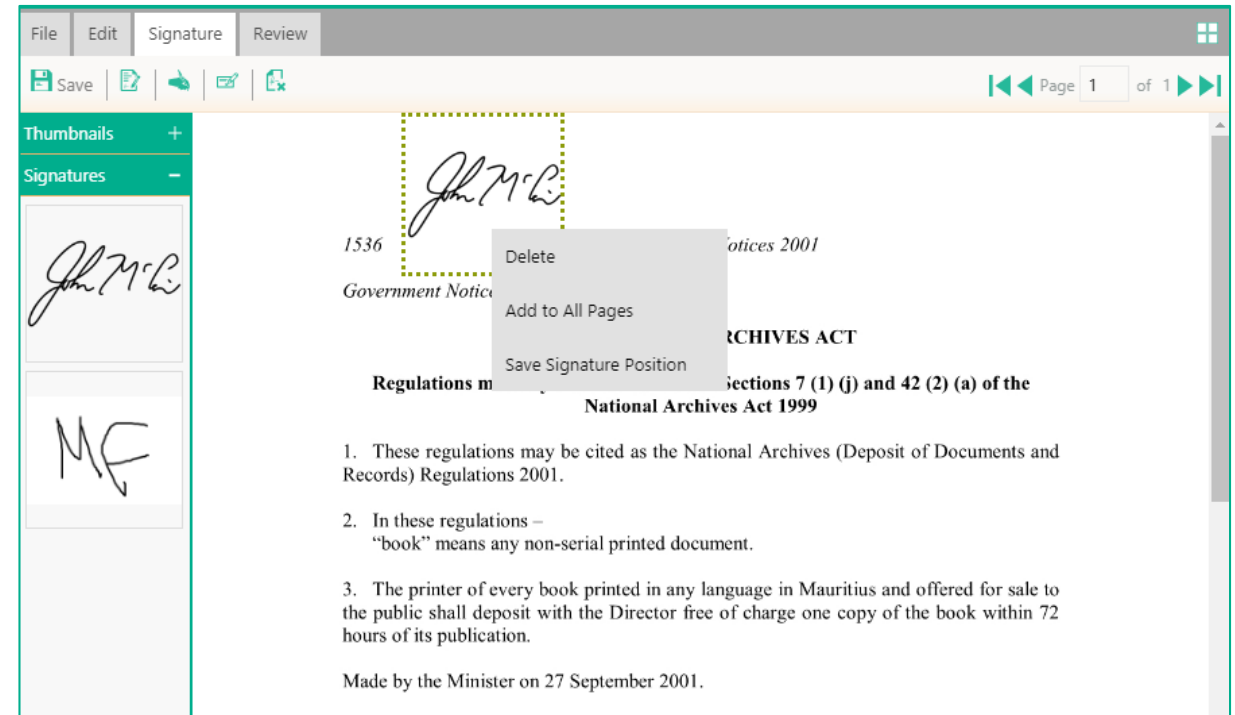
Custom Rule

# Digital Signature

- Ability to attach a digital code or signature to an electronically transmitted message that identifies the sender.
- Digital signature capabilities to various types of documents stored and managed by everteam Repository.



Digital Signature



Signature

# Transfers & Notes

- Ability to transfer documents and see tracks that were transferred from other users from My Transfer tab feature.
- Ability to add notes and see the ones that were transferred from other users from the correspondence notes feature.

<input type="checkbox"/>	Author	Date	Status	Note
<input type="checkbox"/>	Sari WeHbE	15/03/2017	Public	Please review the correspondence

Correspondence Notes

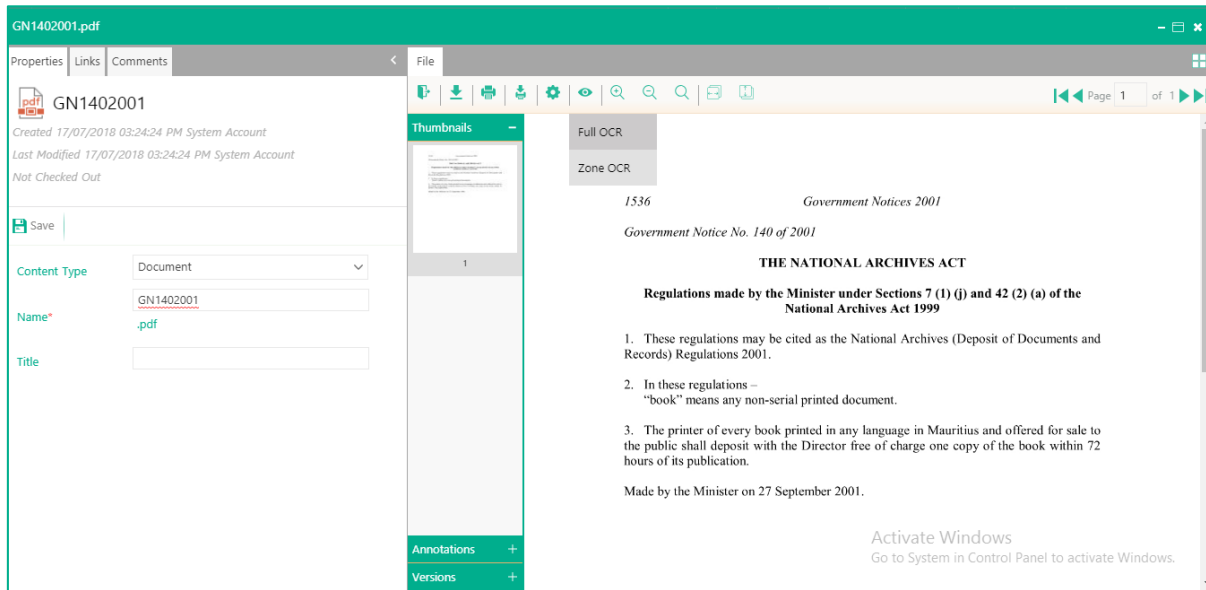
# Auto-Tagging

- The solution generates metadata to intelligently tag, store, and manage each piece of information.
- AI analyzes the metadata tags and relationships to apply context to the information. This is what we call Auto-Tagging.
- The solution determines appropriate tags based on the metadata, content keyword(s) that are relevant to the organization.

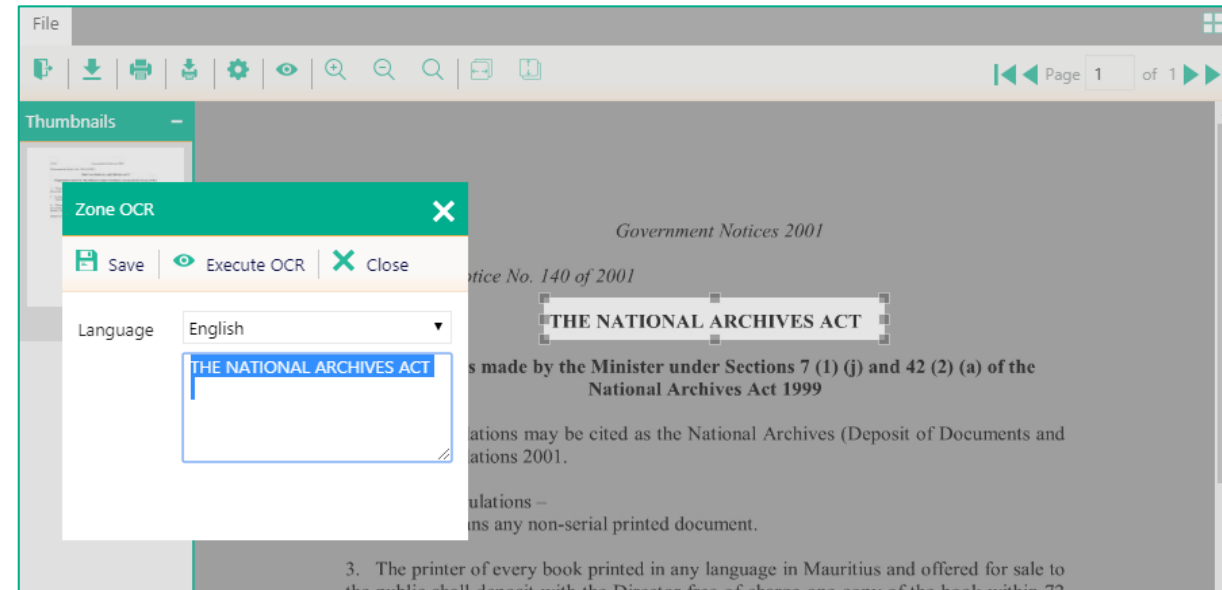


# OCR

- Ability to apply optical character recognition to convert images into editable text formats and extract text from PDF files.
- OCR can be executed on the document, either as a full or a zone OCR.
- The OCR service scans the selected area and extracts text content from it.



OCR



Zone OCR

# AGENDA

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Archiving

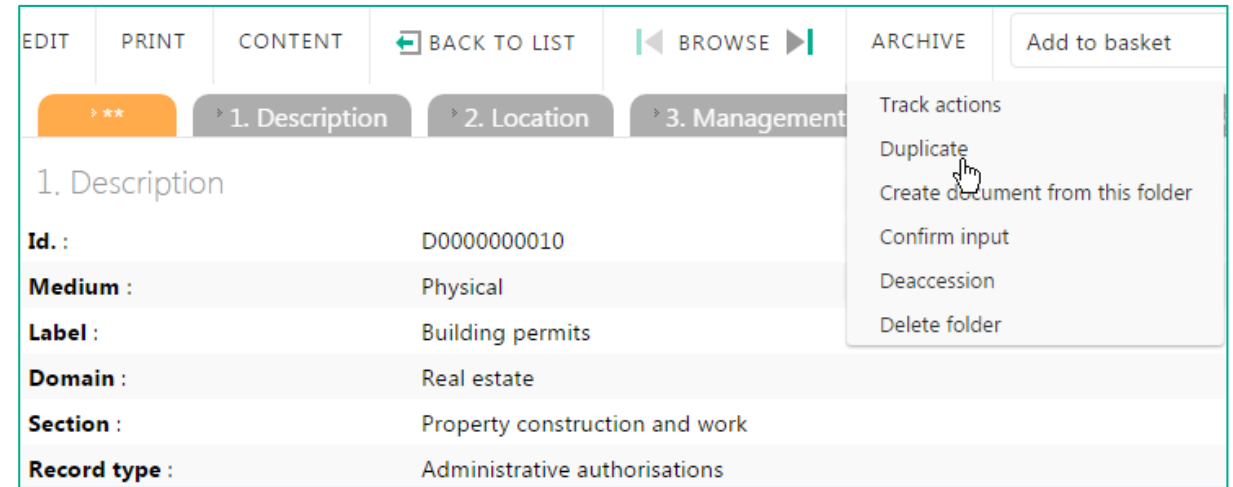
# Archiving Phase

- **Retrieving**

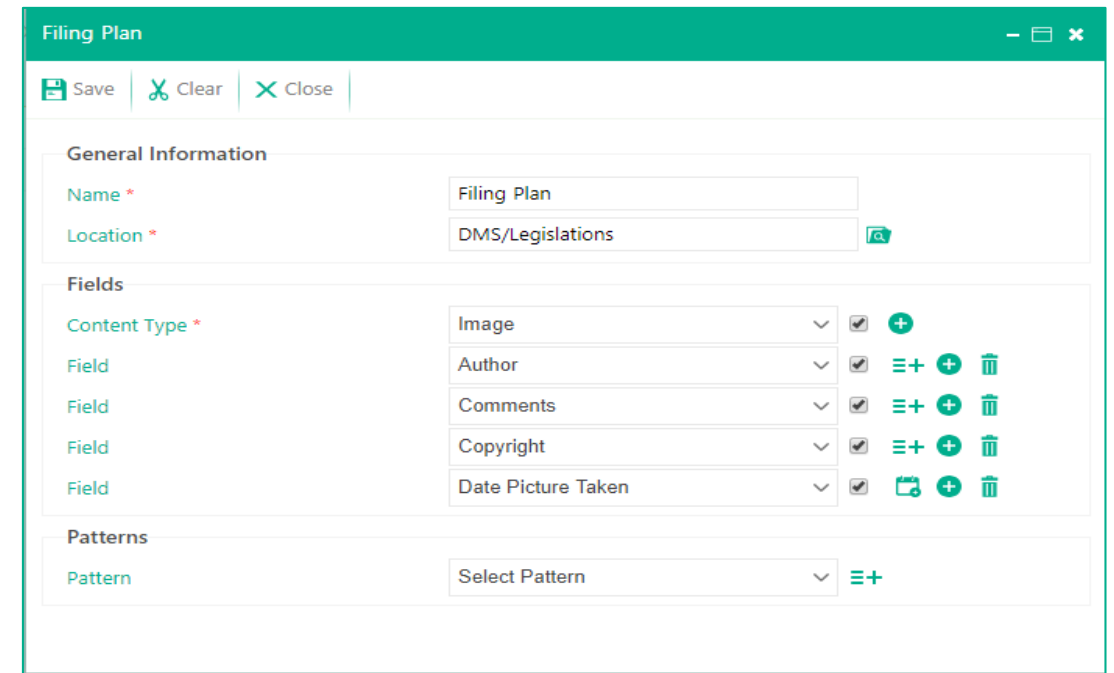
- Search: search for data like files, images, documents...
- Taxonomy: auto-classification of files, emails, documents, images...
- File Plan: creating file structure, organize files in folders and sub-folders and manage records effectively.

- **Preserving**

- Content Storage: archive and store information, documents, files, media, images... in one central repository, so it can be retrieved when needed.



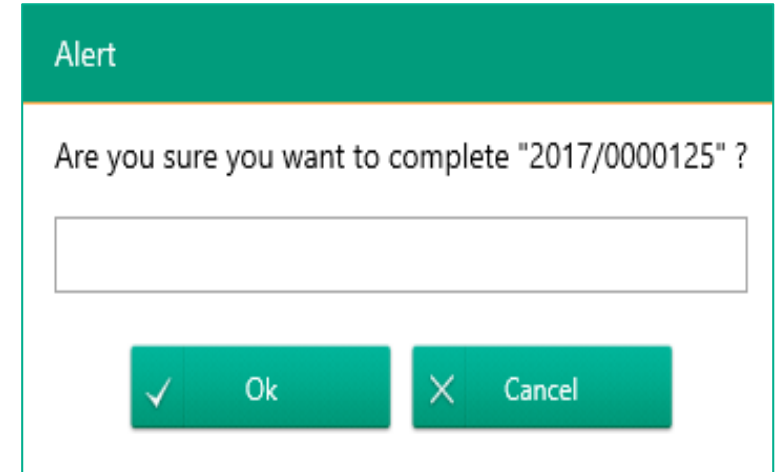
Describe an archival unit



Creating a filing plan

# Archiving

- Ability to establish a relation between the correspondence record and the physical archived correspondence.
- The filing plan is a configurable hierarchy designed on the level of super users. It consists of:
  - Cabinets;
  - Shelves;
  - Binders;
  - Folders.
- Ability to assign the electronic record that represents a physical correspondence to a related location in the filing plan to store its physical whereabouts for possible later usage.



Complete Archive Correspondence

# Categorization, Filing & Auto-Classification

- Customizable correspondence tree and list views
- Easy to use and customizable toolbar containing all users' actions: reply, archive, transfer correspondences etc...
- Customizable documents attributes supporting a wide range of user controls including lists, date calendar, single or multiple choices, etc...
- Customize documents classification plan.
- Multi-language support on both the interface and data levels.
- Ability to arrange and classify electronic documents automatically in specific and predefined categories.
- Auto-classification process allows rapid and easy retrieval of information in the search phase.

# Search

- Ability to search through various functions available within the system:
  - Advanced search
  - Simple search
  - Search within delivery
  - Correspondence registration number



Search within Delivery Notes x

Search | Clear | Delivery Note Search

Date: From [ ] To [ ]

Recipient Name [ ]

Delivery Note Status [ ]

Courier [ ]

Advanced Search x

Search | Clear | Save Query | Daily Report | Signed By Me

I would like to search within the following inbox: My Inbox x

I would like to use the following search criteria: [ ] x

Register Date:	From [ ] To [ ]	Subject [ ]
Reference [ ]		Priority [ ]
Registered By [ ]		Document Type [ ]
Sending Entity [ ]		Correspondence Category [ ]
Receiving Entity [ ]		Classification [ ]
Transferred From [ ]		Status [ ]
Transferred To [ ]		Note [ ]
Purpose [ ]		Linked Correspondence [ ]
		Tags [ ]
		Content Search [ ]



# AGENDA

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Controlling

# Controlling Phase

- **Follow-up**

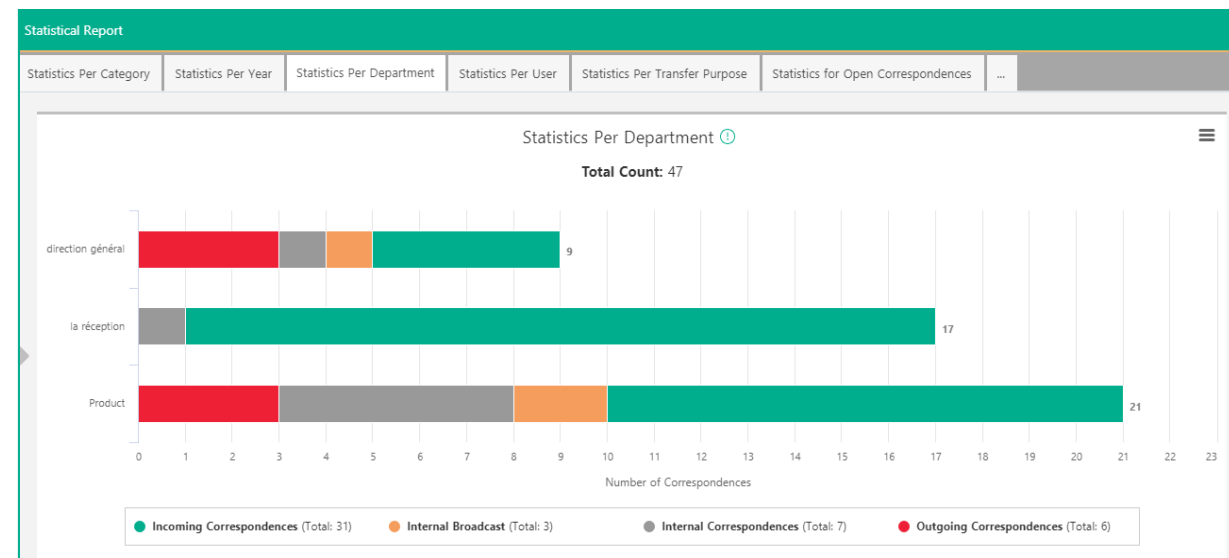
- Monitoring: evaluation and reporting of all correspondences.
- Tracking: tracing the mobility and status of each task, email, document or file.
- Due Date: define due date to each task.

- **Reports and Dashboards**

- Reports: create different types of analytical reports.
- Dashboards: graphical user interface to view KPIs and check progress.
- KPIs: measure performance and success of a particular activity or task.

- **Alerts and Escalation**

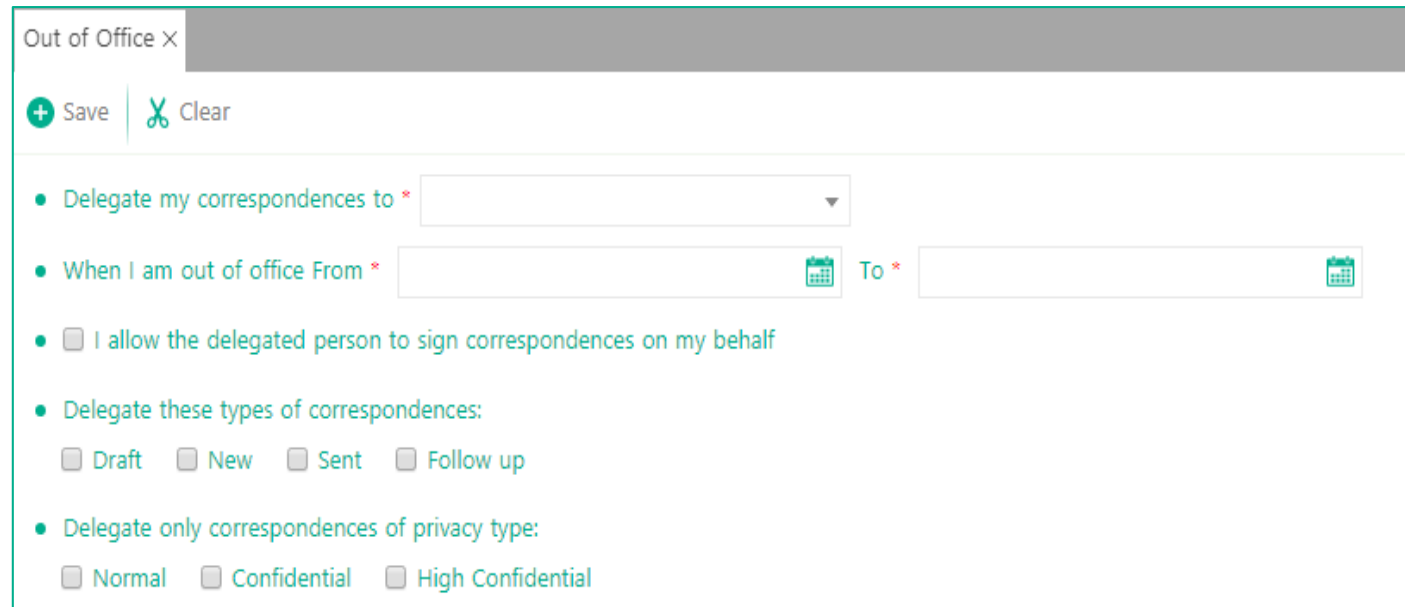
- Alerts & Notifications: configure reminders for events or tasks that require attention or specific action in a specific time.
- Delegation: assign tasks or responsibilities to specific people.



Dashboard

# Notifications & Delegation

- Ability to set up notifications that are intended to inform them about specific actions, correspondence received, due dates etc.
- Ability to delegate tasks and authorities to another user during a specific period of time.



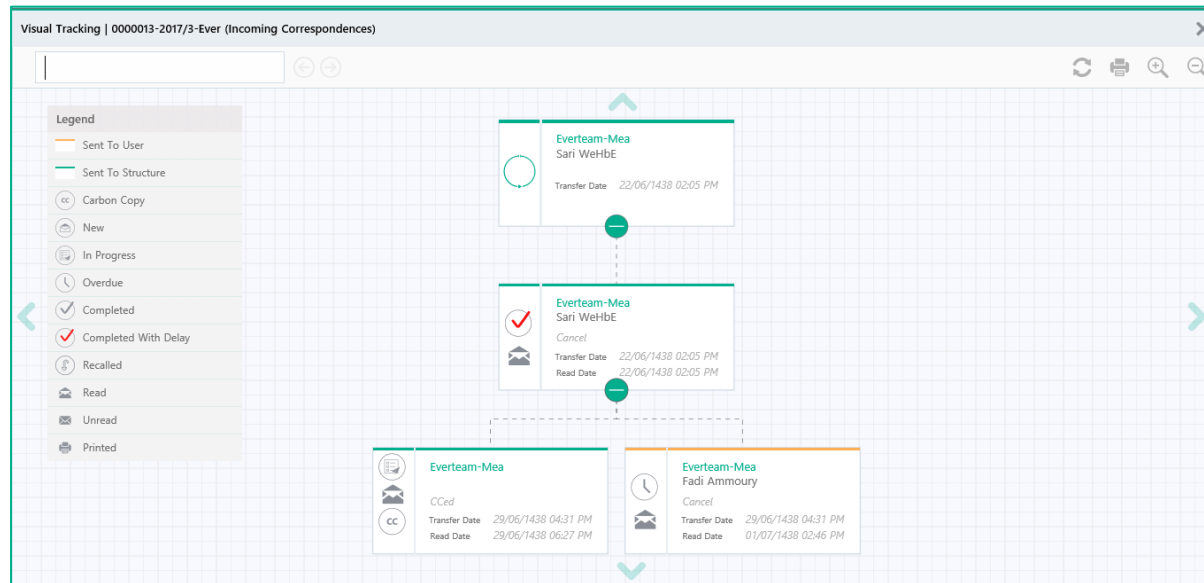
The screenshot shows the 'Out of Office' settings interface. At the top, there is a tab labeled 'Out of Office x'. Below the tab are two buttons: a green '+ Save' button and a grey '✂ Clear' button. The main settings area contains several options:

- 'Delegate my correspondences to \*' with a dropdown menu.
- 'When I am out of office From \*' with a date picker icon, followed by 'To \*' with another date picker icon.
- A checkbox labeled 'I allow the delegated person to sign correspondences on my behalf'.
- 'Delegate these types of correspondences:' with four checkboxes: 'Draft', 'New', 'Sent', and 'Follow up'.
- 'Delegate only correspondences of privacy type:' with three checkboxes: 'Normal', 'Confidential', and 'High Confidential'.

Delegation

# Entity-extraction & Visual Tracker

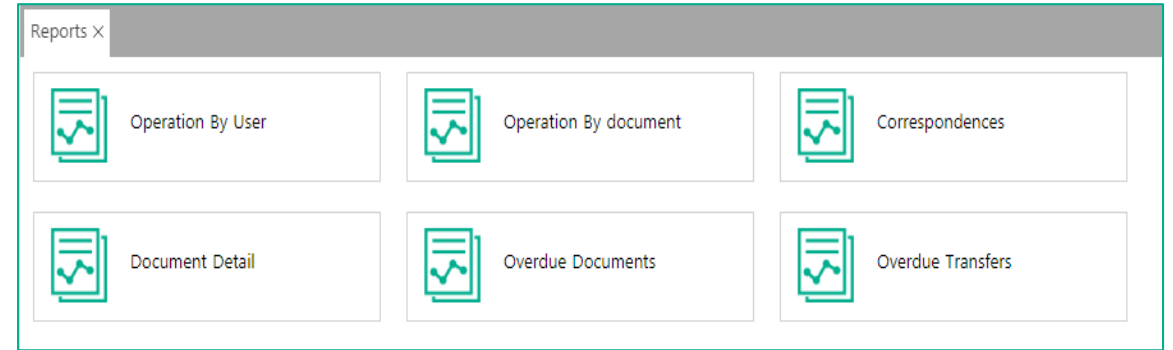
- Ability to extract information, identify and classify key elements from records into pre-defined categories. It extracts different entities such as time, location, proper name, organization...
- Ability to view the process status and history and track the full lifecycle of the correspondence.
- Clicking on a task item will display all the action and user details at this level



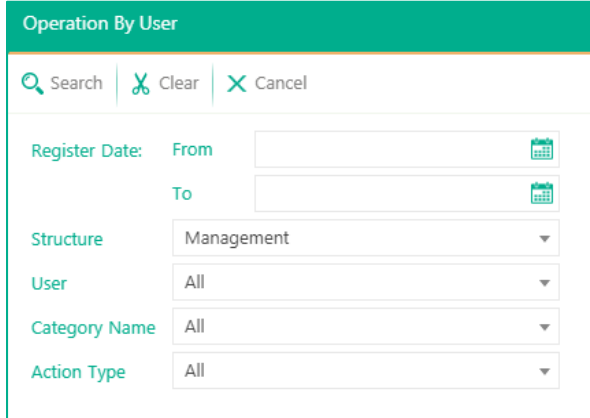
Visual Tracking

# Audit Trail & Reporting

- Ability to keep full or partial audit trails for further reports related to audits and/or statistics.
- Capability of logging all correspondence information such as login name, login date and actions taken on a given document such as updates, check in/out, etc.
- Ability to have various types of reports: operation by user, document detail, operation by document, overdue document, correspondences & overdue transfers.



CTS Reports

A screenshot of the "Operation By User" report criteria form. It features a search bar with "Search", "Clear", and "Cancel" buttons. Below are several filter fields: "Register Date" with "From" and "To" date pickers, "Structure" set to "Management", "User" set to "All", "Category Name" set to "All", and "Action Type" set to "All".

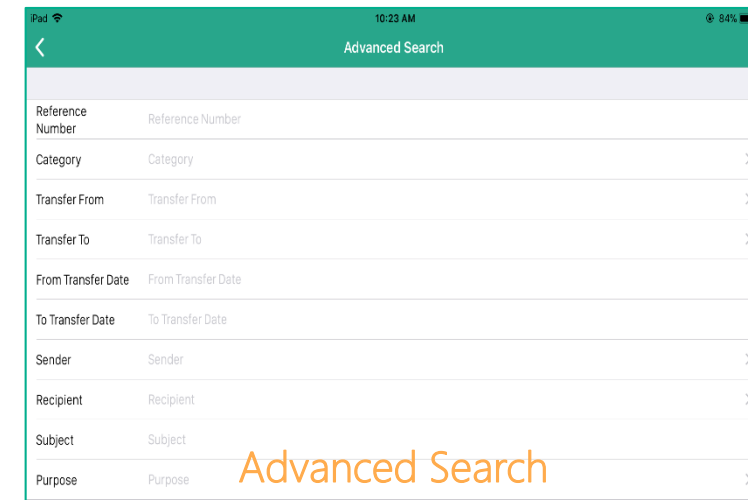
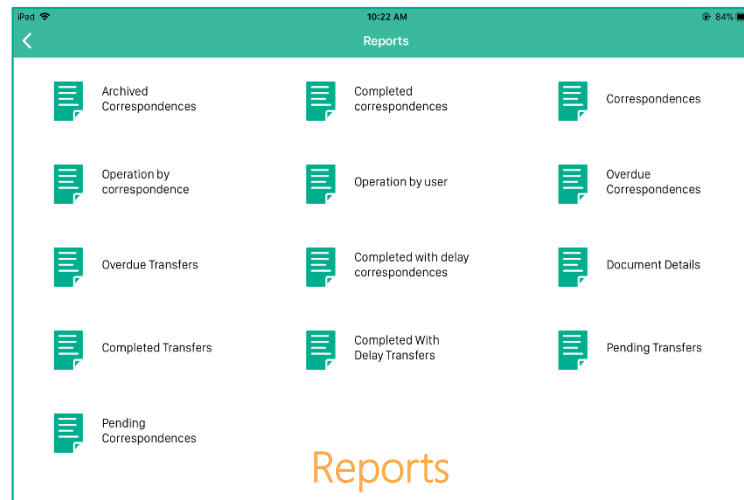
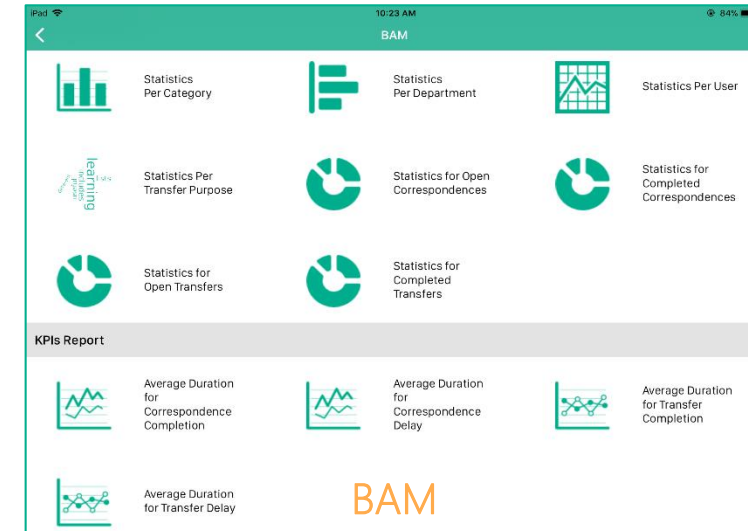
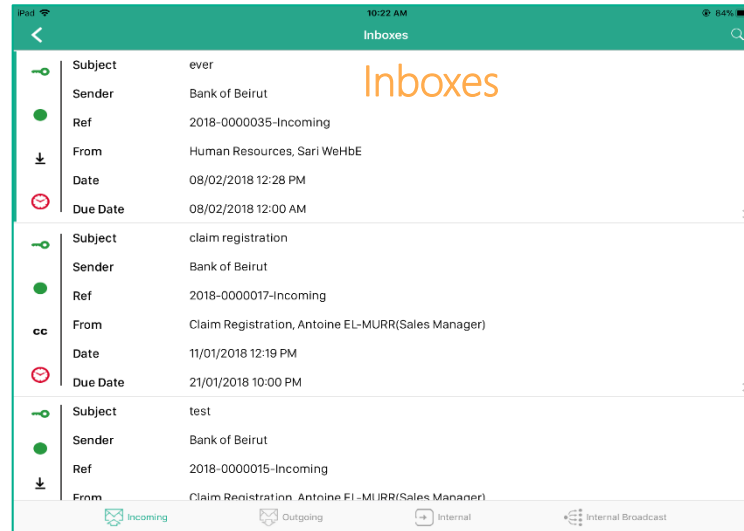
Report Criteria

# Task Management

- Lock correspondences in use
- Correspondence circulation and delegation to approve, reject, transfer, reply etc...
- Rescan, print or archive correspondences
- Track correspondences deliveries, and automatic delivery note generation
- Define due date, delegate correspondences and tasks, start and end dates for correspondences actions.
- Integrated email notification engine

# Mobility & Broadcast

- Correspondence Management System is provided in a mobile version which is support by iOS and Android platforms.
- The solution supports similar functionality to the desktop version.
- The mobile version is designed with a user-friendly interface to allow business elite users to interact within the system and to track correspondence through a mobile or tablet device.
- Broadcast feature give users the ability to send internal and external broadcasts.



# Integration with Analytics

- Since the solution is natively integrated with everteam.analytics, user have the ability to:
  - Optimize end-to-end information lifecycle management
  - Gain actionable insights into structured and unstructured content
  - Automatic analysis, exploitation and functions for large volumes of content
  - Identify tend enhancements of complex issues using real-time analysis



# AGENDA

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Key Benefits

# Key Benefits

- Reduce costs of storage and efficiently manage correspondences within a common platform and a unified repository
- Enhance employee performance and reduce time spent on processing and responding to incoming correspondences
- Manage and archive all types of correspondence for legal and compliance obligations
- Improve customer service by providing accurate, fast and trustworthy responses to inquiries
- Achieve Return on Investment by optimizing content production, reducing paper usage and consolidating communications



**DEMO**



Shift



# everteam

Thank you



Everteam-gs



Everteam-gs



Everteam



EverteamGS