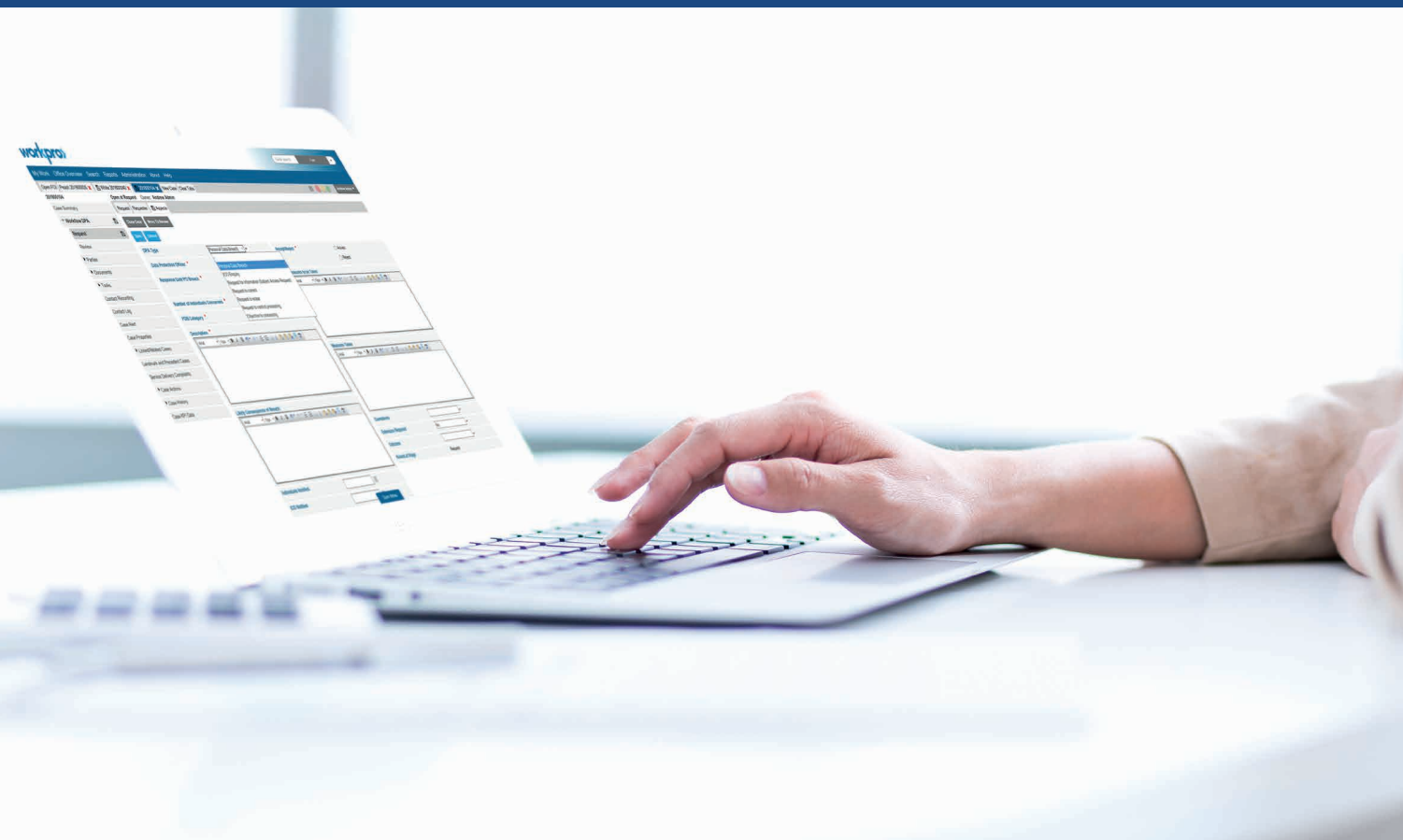


# THE SMART WAY TO LOG, TRACK AND REPORT FOI AND DP CASEWORK

GDPR compliant case management system with UK-based data hosting





## WHY WORKPRO? 12 WAYS WORKPRO IMPROVES REQUEST HANDLING

### THE RIGHT RESPONSE FAST

#### Convenient access

All request information and activity is stored and managed in one system, reducing time and improving coordination.

#### Ownership and accountability

Cases and tasks are allocated to named individuals. Everyone knows exactly what needs to be done next, by whom.

#### Reduced handling costs

Duplication of effort is eliminated, the admin burden lightened, and requests are processed more quickly.

#### Analysis and publication

Common requests and outcomes can be identified for FAQ publication and improvement initiatives.

### INCREASED PRODUCTIVITY

#### Prompts action

Alerts and reminders prompt action, keeping everything on track and ensuring no deadline is missed.

#### Faster correspondence

High-quality correspondence, e.g. acknowledgements, is quickly produced using auto-populated templates.

#### Effective planning and scheduling

'At a glance' views monitor KPI, task and case status highlighting any possible issues requiring attention.

#### Improved reporting

Well categorised data ensures accurate reporting. Reports are easily produced using the standard reports library or report creation tools.

### SECURITY AND COMPLIANCE

#### Consistent process

Clear workflow guides staff so correct procedure is always followed and requests fairly handled.

#### GDPR and FOI compliance

FOI, EIR, GDPR and SAR process rules are reflected in the workflow. The file management utility supports data handling compliance.

#### Lessons Learned

Learn from request themes to identify any areas of improvement in your organisation.

#### Security and audit

Case data is securely stored and backed up. Authorised access only, with a full, chronological history of case activity.

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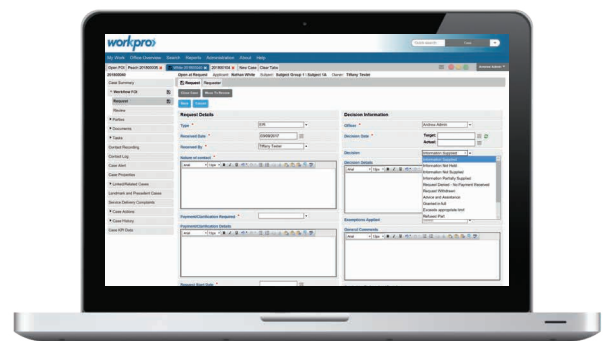
“Workpro helps our office deal with ever increasing case volumes and provides our staff with the tools to help decrease case response times. In addition, the advanced management information tools support performance management and reporting.”

**David Lowrie**

Office of the Scottish Information Commissioner

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## COMPLIANCE AND EFFICIENCY IN FOI AND DP CASE HANDLING



New EU GDPR legislation has significantly increased company obligations regarding the processing and protection of the data they hold on EU citizens. This has added to already robust Freedom of Information (FOI) and other data access rights.

Managing this is a headache, not to mention a cost and risk, that most companies could do without.

Workpro is case management software that comes with ready to deploy FOI and DP case types. These are specifically designed to ease the burden of responding to Freedom of Information (FOI and EIR) and Data Protection (DP, GDPR, SAR) requests.

We delivered our first case management system in 2003. Workpro is based on our extensive knowledge of industry best practice in case handling.

### Off the Shelf but Customisable

Workpro comes 'ready to go' with FOI, EIR, DP and SAR case types already built in. However, it is also highly customisable and adaptable should you need it.

### UK Based Cloud Hosting

Workpro Software as a Service is hosted in highly accredited, UK based data centres with 24/7/365 security and 100% availability.

### On-Premise Option

You can also choose an on-premise system if preferred. We can deliver Workpro using Microsoft Virtualisation technology or on a pre-configured server.

### Workpro also offers:

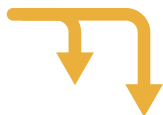
- Industry standard data encryption
- Microsoft Office and Outlook integration
- Responsive, easy-to-use interface
- Configurable user access permissions
- API (Application Integration) tools
- Limited training required
- Free trial available.

# WORKPRO TOP FEATURES



## Request Capture

Record all request details, however they come in (email, letter, web, phone, text and social media). Context sensitive input and look-up lists ensure speed and accuracy.



## Configurable Workflow

Workflow adapts to case type to guide users through the correct process at each stage. Multiple case types are supported.



## Alarms

Highly visible alerts and reminders, along with task management tools, keep cases on track. Time limits and thresholds are built in to the workflow.



## Document Management

All documentation associated with a case is held and managed in one place, with support for all common formats. Documents can be automatically created in the workflow.



## Auto-populated Templates

Professional, high quality letter and email templates increase productivity, accuracy and consistency. Correspondence is automatically populated with case data to save time.



## Case Ownership

A named person is allocated for every case. Cases can be reassigned as necessary. Tasks can be allocated to other individuals, including external parties.



## Real-Time Performance Monitoring

Dashboards and real-time case and task views track performance. Monitoring can be done by individual case, staff member, team caseload or across the whole organisation.



## Reporting and Data Analysis

All data and documents in the system can be interrogated to produce statistics or reports. This ability goes right down to document level. Everything is available for analysis.



## Quick and Advanced Search

Workpro accumulates a wealth of information. Search facilities, including precedent and linked cases, help staff access all pertinent information to make better, well-informed decisions.



## Full Security and Audit features

Access to the system or certain cases is restricted according to your company policy, protecting sensitive data.



## User Maintained Admin Tools

Administration tools allow aspects of the solution to be maintained by authorised system administrators, e.g. user permissions, lookup lists, KPIs, templates.



## File Management Utility

Supports client records management and document retention policies. Under authorised administrator control, this process can be scheduled and automated.

For more information on how Workpro case management software can help your organisation or to arrange a free demo:

t: +44 (0)131 449 7071

w: [www.workpro.com](http://www.workpro.com)

e: [info@workpro.com](mailto:info@workpro.com)