



**BANCTEC**  
Enterprising solutions that keep business moving



## eFIRST™ case

Bringing content, processes and people together

**eFIRST™ case makes the most of your information and content by providing an effective environment to organise your data and all associated processes and relationships.**

In a fast changing world your business needs to respond quickly to change in order to remain competitive. eFIRST™ case allows you to do this by providing a dynamic environment to more effectively manage business information and content.



Increase the value of your information

The eFIRST™ case framework allows an organisation to present and access information in context with the relevant business process. It provides multiple drill-down views to give easy access to any relevant information

folder, no matter where that data is stored. This allows you to provide quick access to your customers' complete history, as well as identify what stage each customer is within any business process. In addition, each case, or customer folder, can be linked with all associated documents and data sets to ensure the next correct action is taken. By managing your information in this way, you will significantly increase customer service levels, employee efficiency and deliver cost effective provision of your business information.

### Business Benefits:

- Increases the value of corporate information.
- Speeds the retrieval of information.
- Provides many views on the same data, giving context to the information.
- Increases efficiency by presenting information as needed by the user.
- Rapid deployment yields a fast return on investment.

### Take control

Multiple channels of communication are available to your customers and information can be scattered across many different systems. eFIRST™ case lets you take control by defining cases using information held within any information system and manage the ensuing business process to ensure the appropriate response. By organising your information into cases, or folders, the business process that needs to drive each case can then be easily linked. Not only does this allow real-time control and management of customer service, but it also provides effective time management to pro-actively set actions to initiate cross-selling opportunities, service level activities and compliance monitoring.

These cases can also be linked by relationship to provide multiple views. For example, link the cases by customer and simply enquire and drill-down. Link together by product and enquire on which customers are using a particular product type. Or link together by process to find out which customers have made a claim or a specific action associated with a product. Further information can be added or accessed from legacy systems and amended or reviewed as the case makes its way through the business process. Each case can be linked to any data type; images, data sets, sound, etc. as well as provide different views of the same data.

### Product Benefits:

- A hierarchy and folder structure is provided.
- Solution based on scalable EJB/Java technology.
- Based on internet-enabled architecture to give plenty of scope for the future.
- Links to workflow routines provided.
- Large volumes of data from multiple systems is easily accessible.
- Easy integration with legacy systems.
- Integrates with other eFIRST™ products to provide end-to-end, enterprise-wide solutions.



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### A complete solution

eFIRST™ case allows easy integration with other third party products and applications as well as the complete BancTec eFIRST™ portfolio. This simplifies the deployment of application systems and can be further extended to give storage and easy access to documents and other electronic media using an existing archive or BancTec's eFIRST™ archive solution. Information can be fed into eFIRST™ case using existing applications, as well as eFIRST™ capture which speeds up the data input process and increases data accuracy. eFIRST™ case then pulls all the information together and allows you to progress and store each case. But eFIRST™ case is not just limited to managing new data that you collect. It can also access legacy systems and current databases to unify all your business information systems.

### Event management

eFIRST™ case can also integrate with most workflow systems, the most seamless of these being FloWare from Plexus. Coming from the same organisation, the best approach to workflow integration has been incorporated right from the start, allowing processes and actions to be run without any user intervention. This provides eFIRST™ case with a powerful event management capability which is used to link together customer and product knowledge to a process event. For example when a customer enquires on a loan to purchase a car, this can trigger a sales opportunity for insurance. These event rules are set to trigger a change in the process in real-time. eFIRST™ case links together your customer, product and process knowledge at the right time to cause an event. This not only provides a powerful cross-selling capability, but can also be used for service level compliance, escalation and fraud protection.

### Exception processing

eFIRST™ case provides support for handling case exceptions in the business process, for example; routing to another process, assigning the case to another worker or supervisor, or pending the case against a future event or condition. This ensures the right person can work on the right case at the right time. eFIRST™ case controls user access and authorisation via its extensive permissions model. This controls what business functions a user has access to and what cases the user can access and work on. In addition, both cases and case items can have notes associated with them. These can be added and amended at any time allowing you to annotate anything you put into the system.

### Technical data

Platforms - HP-UX, AIX, Windows NT 4.0, Windows 2000  
Databases - Oracle 8, SQL Server, IBM UDB/DB2  
Workflow Integration - Plexus FloWare  
Applications Server - WebLogic, WebSphere, JBOSS

### About BancTec

BancTec is a worldwide systems integration, business process outsourcing (BPO) and services company delivering high-volume, mission-critical solutions to automate and streamline data and paper-intensive business processes. As a leading vendor in this area, at least 5 million documents or items are scanned and processed by BancTec systems every day across the UK and Ireland.

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