eCASE

Correspondence

# Correspondence Tracking User Manual

v2.2.1

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# Correspondence 2.2.1 Correspondence Tracking User Manual

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# Contents

# Using This Manual

The following formatting conventions are used in this manual to highlight important information:

- *Italicized* text indicates a location, for example a particular *Folder*, *Tab*, or *Window*.
- **Bold** text indicates a specific user action, such as clicking a **button**.
- **Red** text and this symbol **(!!)** are used in Notes to **bring attention to crucial information**.

# 1 Correspondence Tracking Overview

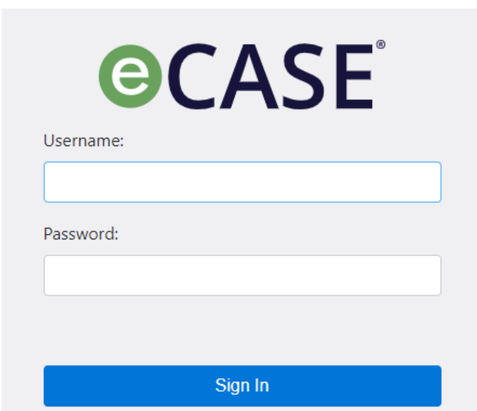
## 1.1 About Correspondence Tracking

The Correspondence Tracking application is built on the core eCASE case management platform. eCASE is a flexible configuration-based platform with specific task-driven applications built on top. The Correspondence Tracking application has been designed to cater to your frequent correspondence needs.

The eCASE Correspondence Tracking application is used to initiate, maintain, manage, and close cases pertaining to organizational correspondence. The application also serves as an archive for closed cases.

## 1.2 Accessing Correspondence Tracking

Log in to eCASE using the link provided by your system administrator. A sample log in screen is shown below:



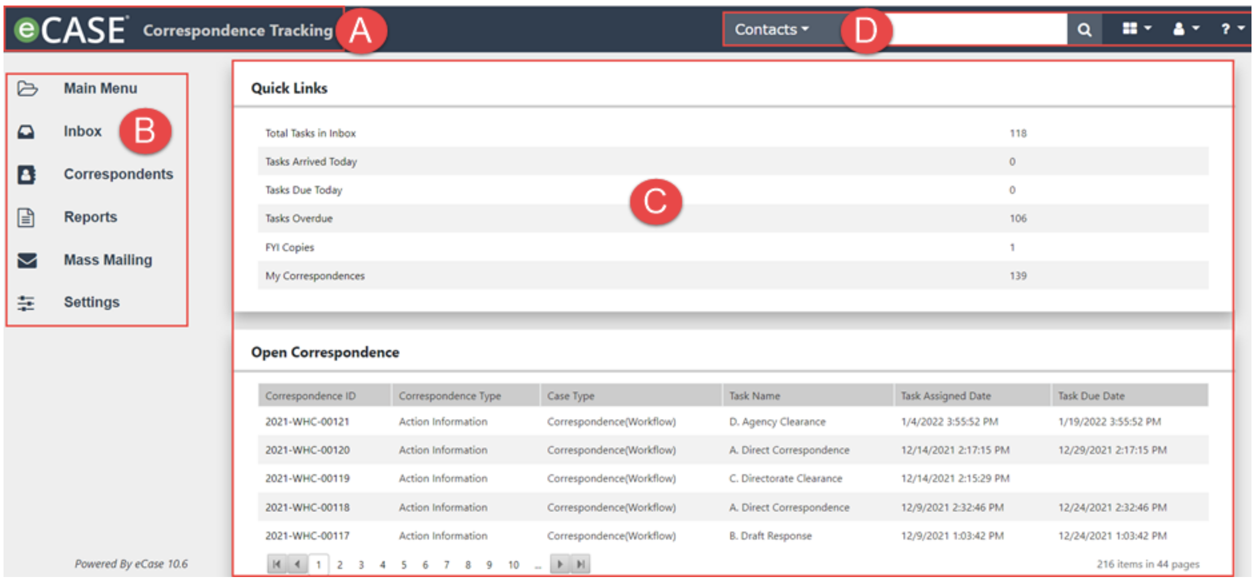

Enter your **Username** and **Password** in the corresponding fields, and click **Sign In**.

**(!!) Note: If your organization has enabled Single Sign On (SSO) Functionality, you are not prompted to enter your log in credentials, and the application will load automatically.**

# 2 Getting Started

## 2.1 Correspondence Tracking Home Screen

The eCASE Correspondence Tracking User Interface (UI) is captured below. The *eCASE Home Page* is the first page that appears after you sign into the application.




The **(A)** *Application Title* and *eCASE Logo* are present in every page in the application, and clicking the logo returns you to this home page.

The **(B)** *Launch Pad* is used to open quick menus for: Main Menu, Inbox, Correspondents, Reports, and some features available only to administrators.

The **(C)** *Dashboard* is the center portion of the homepage, and it contains the workspace, which changes depending upon the page and actions selected.

The **(D)** *Quick Search Bar* allows you to complete searches in the application for Contacts, Documents, etc. For additional information regarding searching eCASE, consult the eCASE Search Capabilities subsection. The Quick Search Bar is adjacent to the *Application Selector*, *Username drop-down list*, and *Help menu*.

For additional information regarding these features, consult the Home Screen Features section.

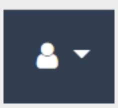
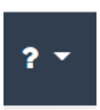
**(!!) Notes:**

- **In eCASE Correspondence, Contacts are managed from the Correspondents Launch Pad option.**

- **Dashboards present on the Landing Page can be customized and managed based on user role. Select desired landing page widgets by clicking Preferences in the Username drop-down list.**

## 2.2 Home Screen Features

See the table below for additional information regarding features on the eCASE Home Screen.

| Feature | Description |
| --- | --- |
| Quick Search Bar   | Use the Query Type drop-down list and the free text field to execute quick searches of data in the application. |
| Application Selector  | Click this widget to show all of your eCASE applications and select an app logo to navigate to that application. |
| User Name Drop-down Menu  | Click to view your user information. There are also options to edit your user preferences and sign out of the application. |
| Help Menu  | Expand this drop-down menu to view help manuals, view the error log, or contact customer support. |

**(!!) Note: For additional information about the eCASE UI, please consult the eCASE Online Help manual.**

## 2.3 Workflow Types

The Correspondence Tracking application can be configured to use a single or variety of workflow routing methods. There are 3 options built into the platform as defined below. The available correspondence types depend on your agency's specific application configuration.

| Type | Description |
|---|---|
| **Ad Hoc** | The Ad-Hoc workflow is a user-driven process that can be configured to list pre-defined workflow activities along with default expected turnaround days to monitor accountability, while allowing you to choose the next activity and to assign the activity to a user, group, or group queue. This type of workflow is very flexible. |
| **Routing** | The Routing workflow type allows you to predefine the routing path for each individual folder. A routing template can also be created to allow you to predefine routing paths for later reuse.<br><br>Using the routing workflow takes the task assignment out of the assigned user's hands and upon "Continuation" of the workflow, the next task will be initiated to the user(s)/group(s) predefined by the folder initiator. |
| **Standard Workflow** | A workflow consists of an orchestrated and repeatable pattern of activity. This is a traditional workflow where the steps to complete a business process are predefined, and all alternate possible steps are also predefined, so users must complete the steps defined in the workflow to complete the process. |

## 2.4 Create New Correspondence Case Folders

eCASE Correspondence Tracking features three different types of Case Folders (Workflow, Ad Hoc, and Routing List) and these three follow the same creation procedure.

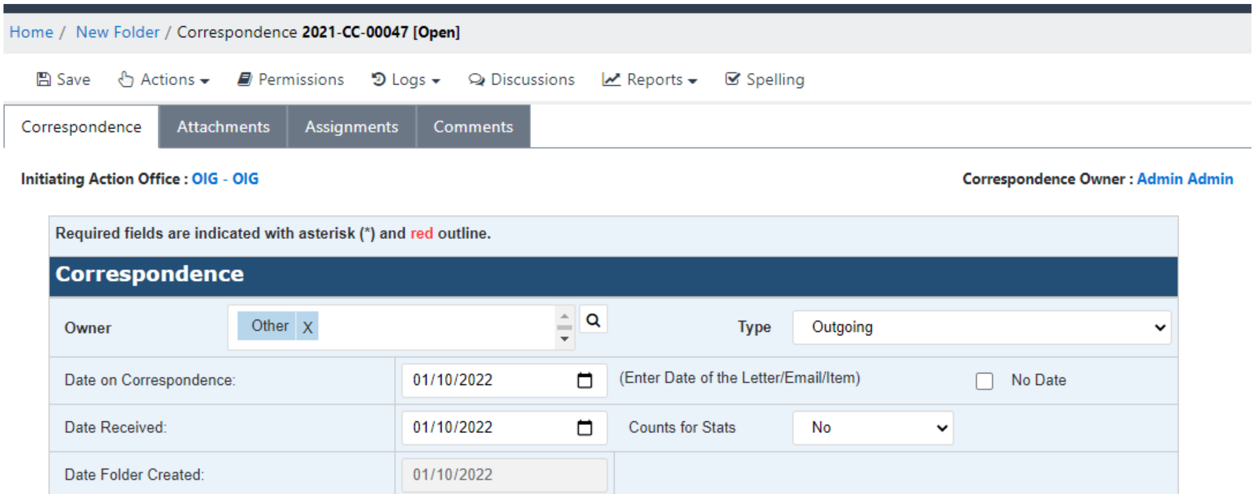
**(!!) Note: The form and fields contained in the form are dependent upon customer configuration, and your eCASE experience may differ. The screenshots and steps in this procedure are intended as an example.**

Complete the steps below to initiate a new Correspondence Tracking Case Folder:

1. Click **Main Menu** > **New** > then select a **Correspondence Type**. The *New Folder* page appears.
2. Complete the required fields.

**(!!) Note: Required fields are indicated by a red border or red asterisk.**

3. Click **Save**. The page refreshes, and the case folder is created.




For additional information regarding the case folder, please consult section 3 Correspondence Tracking Case Folder Interface.

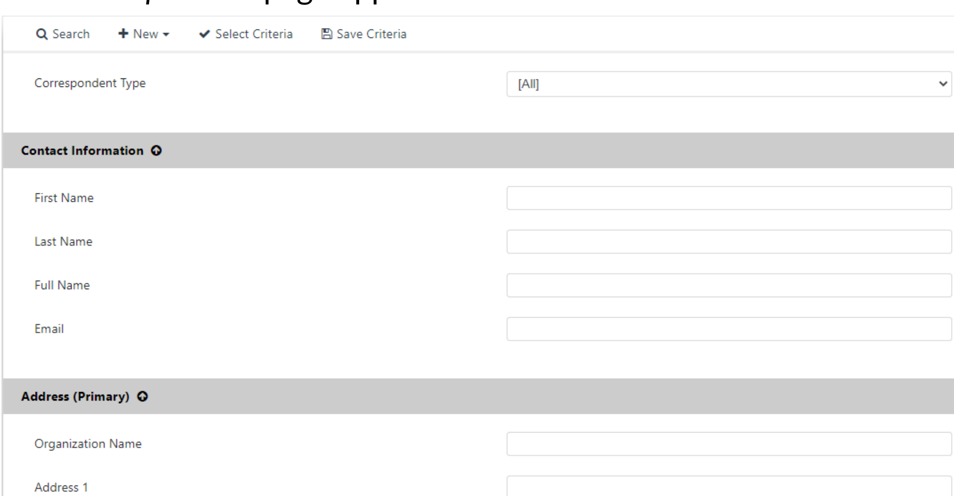
## 2.5 Manage Correspondents

The following sections provide steps to search for and create new correspondents. It is a best practice to always search for a correspondent before creating a new requester in the system. This prevents duplicates and helps maintain data integrity.

### 2.5.1 Search Correspondents

To search for Correspondents:

1. From the *Launch Pad*, click **Correspondents > View > Search Correspondents**. The *Search Correspondent* page appears.

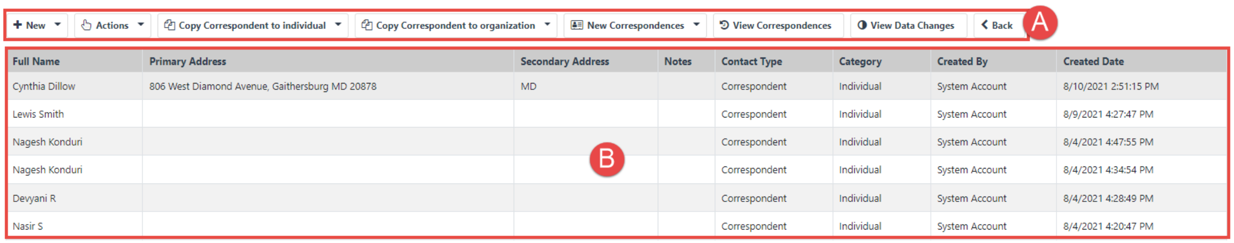



2. Select the **Correspondent Type** from the drop-down list.

3. Enter the search criteria in the fields.
4. Use the **Output Table Properties** to define the structure of the Search Results. Move **Available Columns** into the *Selected Columns* workspace by selecting the column name and then clicking the **> right arrow** button. These selections define the structure of the search results.
5. Click **Search** to execute a search against the criteria.

**(!!) Note: Click Save Criteria to save the entered search criteria as a reusable search criteria template.**

6. After clicking **Search**, the application returns a set of search results that match the entered criteria.




You can use the buttons and drop-down lists on the **(A)** *Action bar* to perform actions on correspondents selected in the **(B)** workspace. The following actions can be performed in the Correspondent Search Results page:

| Name | Description |
|---|---|
| **New drop-down list** | Click this drop-down list to create a new Agency, Congressperson, Correspondent, or Senator profile. |
| **Actions drop-down list** | Select a correspondent from the search results and then click this drop-down list to select an action to perform on the row. Selections include: View, Edit, Delete, and Merge. |
| **Copy Correspondent to Individual drop-down list** | Select a correspondent from the search results and then click this drop-down to create a new contact for the correspondent. |

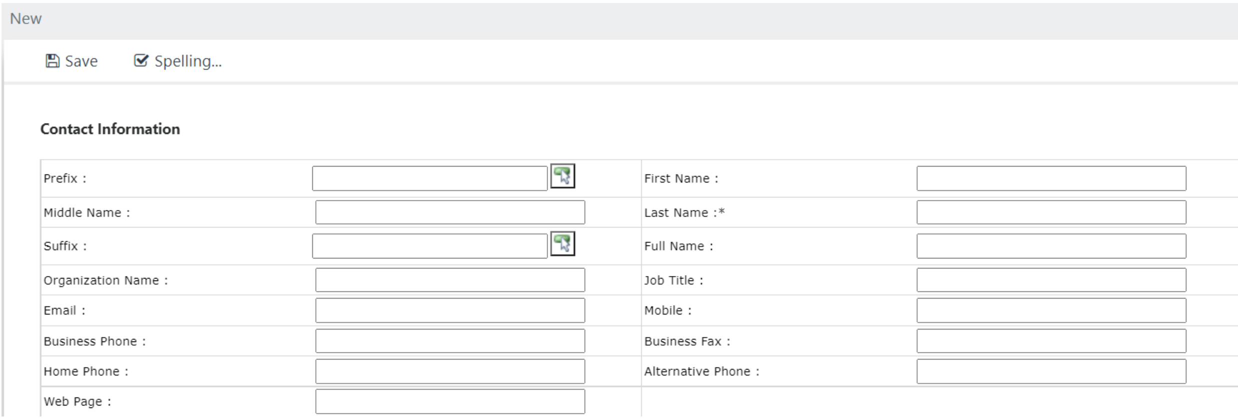
| Name | Description |
| --- | --- |
| **Copy Correspondent to organization drop-down list** | Select a correspondent from the search results and then click this drop-down to create a new organization to pair with the correspondent.<br>This functionality is useful to avoid creating a new agency and new case, instead you can use this feature to assign the task to the new duplicate agency. |
| **New Correspondences drop-down list** | Select a correspondent from the search results and then make a selection from the drop-down list to create a new Correspondence folder. The selected Correspondent appears in the *Correspondent* field. |
| **View Correspondences** | Select a correspondent from the search results and then click this button to display a list of all Correspondence Tracking case folders created by this user. |
| **View Data Changes** | Select a correspondent from the search results and then click this button to open the Contact Data History window, which displays a list of all changes to the Contacts profile information. |
| **Back** | Click this button to return to the Search Correspondent page. |

### 2.5.2 Create New Correspondent

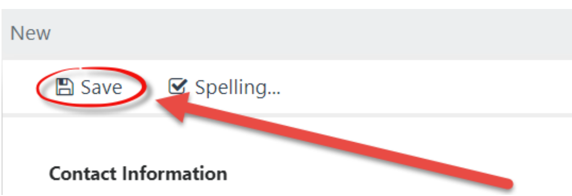
**(!!) Note: We recommended searching for the Correspondent you wish to create prior to creating a new Correspondent profile. This helps to eliminate duplicate profiles. The system creates a history for each Correspondent, so avoiding duplicates is beneficial to data integrity.**

To create a new Correspondent:

1. From the Launch Pad, click **Correspondents > New > Correspondent**. The *New Correspondent* page appears.




2. Enter the correspondent **First Name** in the field.
3. Enter the correspondent **Last Name** in the field.
4. Complete all required and additional fields as desired.
5. Click **Save**.



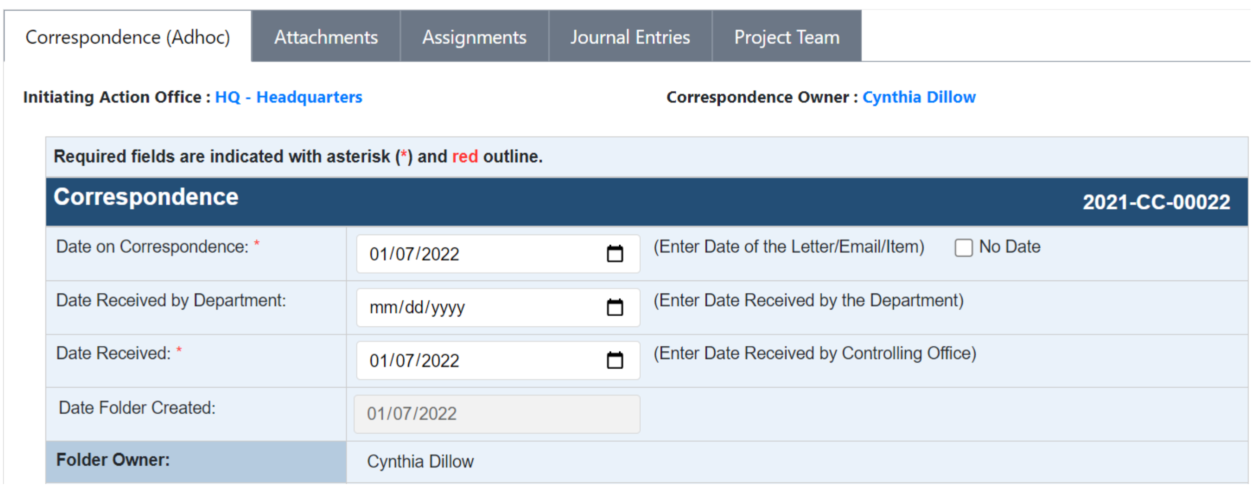

6. A confirmation window appears. Click **OK**. The new correspondent profile is successfully created.

# 3 Correspondence Tracking Case Folder Interface

The following subsections capture information about the eCASE Correspondence Tracking interface.

## 3.1 Correspondence Tab

The *Correspondence* tab is the primary tab in the Correspondence Tracking case folder. It is used to capture information during folder creation and throughout the case folder workflow. The actual contents of this tab depend on your organization's configuration, and the screens provided in this manual are only an example.

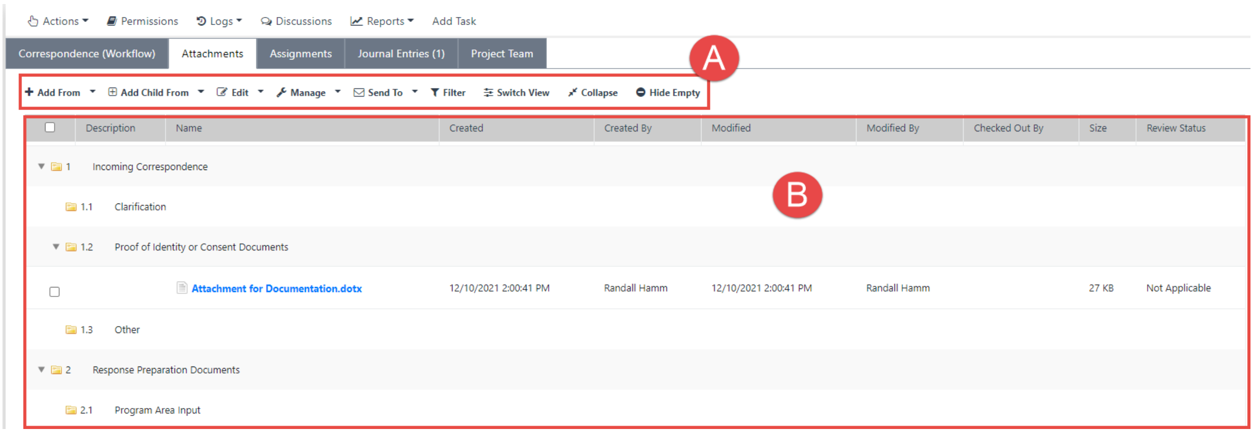



## 3.2 Attachments Tab

The *Attachments* tab allows you to add attachments to the Case Folder, as well as manage these attachments using the **Check Out/In, Send out and OCR Document** functions. Attachments in this tab are structured by the value selected in the Attachment Type drop-down list during upload.

You can **(A)** upload, edit, or perform other actions to attachments by using the buttons and menus in the action bar.

After an Attachment is uploaded to the tab, it is placed in the **(B)** document filing structure according to the selections made during upload.




### 3.2.1 Attachment Actions

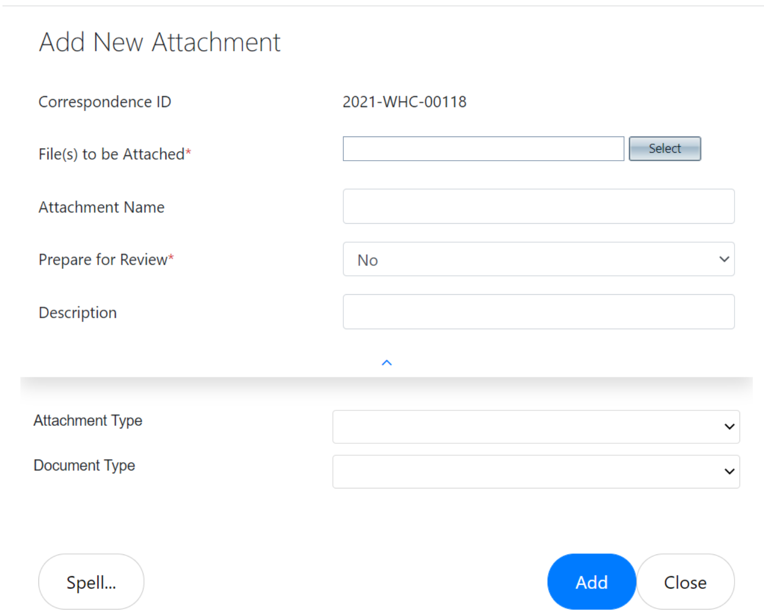
The drop-down lists and buttons available within the *Attachments* tab *Action Bar* include:

- *Add From*: Upload attachments to the *Attachments Workspace*.
- *Add Child From*: Add child level attachments to attachments already within the *Attachments* Workspace.
- *Edit*: Edit selected attachments. When editing an attachment, it is “checked out” and other users are not able to edit the attachment until it is checked in.
- *Manage*: Manage, alter and delete attachments, properties, and metadata.
- *Send To*: Distribute an attachment via email.
- *Filter*: Open the *Filter Attachments* pop up window, where you can select options from the drop-down lists to filter the attachments contained in the tab.
- *Switch View*: Alter the filing structure of the *Attachments Workspace*.
- *Collapse*: Collapse all folders within the filing structure.
- *Hide Empty*: Make empty folders invisible within the *Attachments Workspace*.

### 3.2.2 Upload a Document

To upload a document to the attachment tab:

1. Within the *Attachments* tab of the case folder, select **Add From > My Computer**. The *Add New Attachment* pop up window appears.




2. Click **Select**. The *File Explorer* pop-up window appears.
3. Select the attachment to upload and click **Open**. The *File Explorer* pop up window closes and the attachment appears in the File(s) to be Attached field.
4. By default, the file name will be used but to rename the attachment being added Enter the new name in the **Attachment Name** field.
5. Select **Yes** or **No** from the Prepare for Review drop-down list. Selecting Yes will prepare the document for redaction.
6. Select the **Attachment Type** from the drop-down list.

**(!!) Note: The Attachment Type drop-down list selection determines where in the file structure the attachment is stored.**

7. Select the **Document Type** (if applicable) from the drop-down list.
8. Click **Add**. The pop up window closes and the document appears in the attachment workspace.

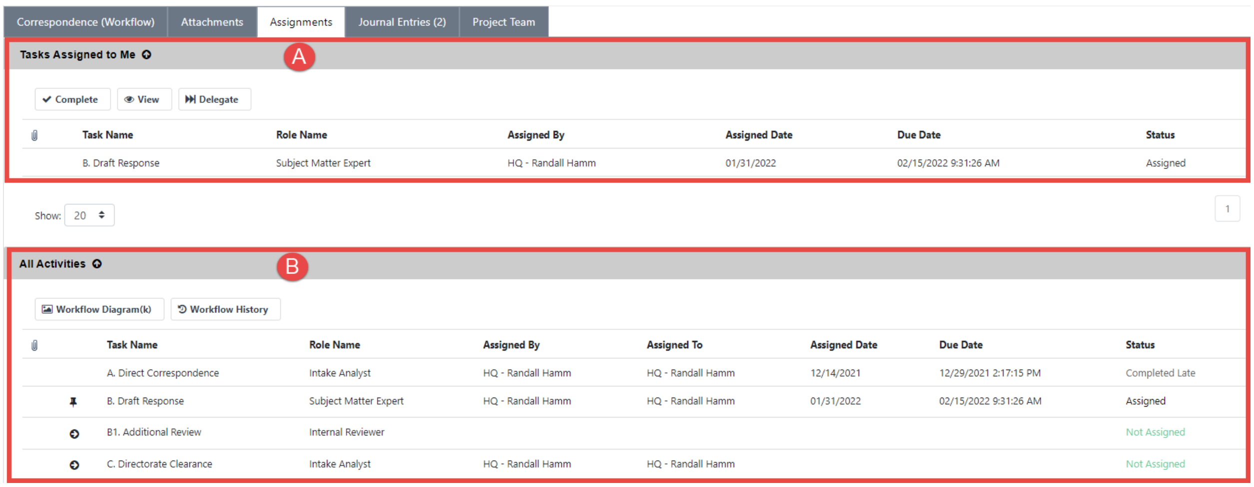
## 3.3 Assignments Tab

The *Assignments* tab allows you to view the case folder workflow and the status of its tasks, and to complete any tasks that have been assigned to that user.

### 3.3.1 Assignments Tab Interface

The **(A)** *Tasks Assigned to Me* section allows you to perform actions on tasks that have been assigned to them specifically. Authorized users can complete a task, complete and assign the task, view the task information, and delegate the task to another user. The **(B)** *All Activities* section displays the full Correspondence Tracking case folder workflow depending on the workflow type.

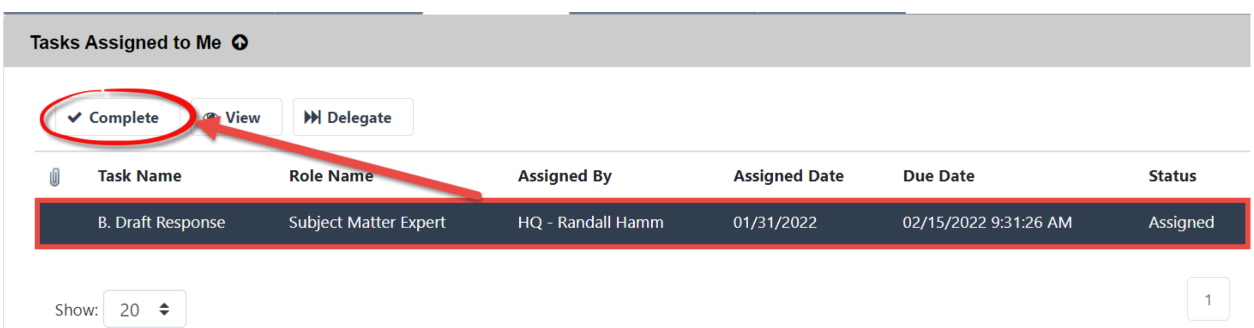
**(!!) Note: The tasks displayed in the All Activities workspace are dependent upon the Workflow Type.**



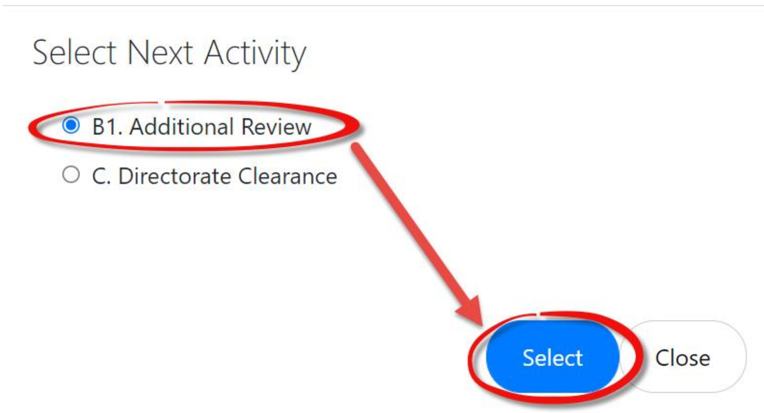

## 3.3.2 Continue the Workflow

To continue the workflow after you complete an assigned task:

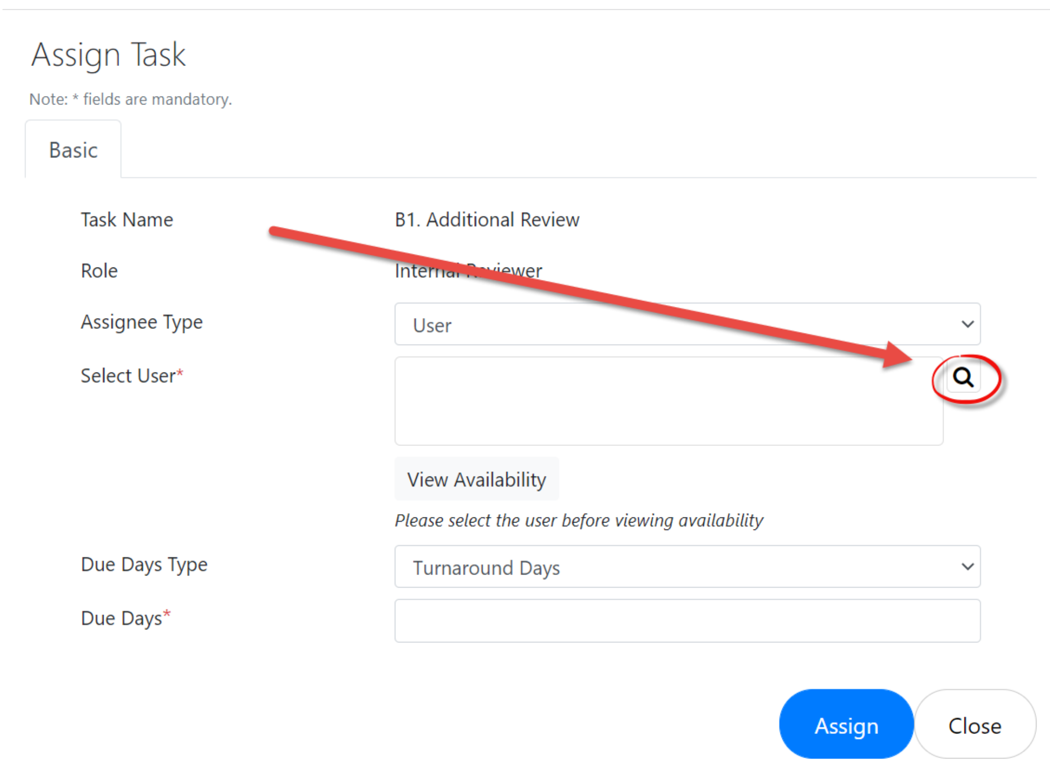
1. Navigate to the *Assignments* tab of the case folder.
2. Select the **Task** from the Tasks Assigned to Me workspace, and then click the **Complete** button.




3. The *Select Next Activity* pop up window appears if more than one route is available. Select a Radio button to designate the next activity in the workflow, then click the **Select** button.




4. The *Select Next Activity* pop-up window closes and the *Assign Task* pop up window appears. Click the *Select User* **lookup icon**.




5. The pop up window refreshes to display a list of eligible users. Click the **radio button** adjacent the user to assign the task, and then click **OK**.
6. The pop up window refreshes and the *Assign Task* workspace reappears, and the user appears in the *Select User* field.
7. Select the **Type of Due Days** from the drop-down list.
8. Enter the **number of days** (or planned due date if the option is present) until the assignment is due in the Due Days field.

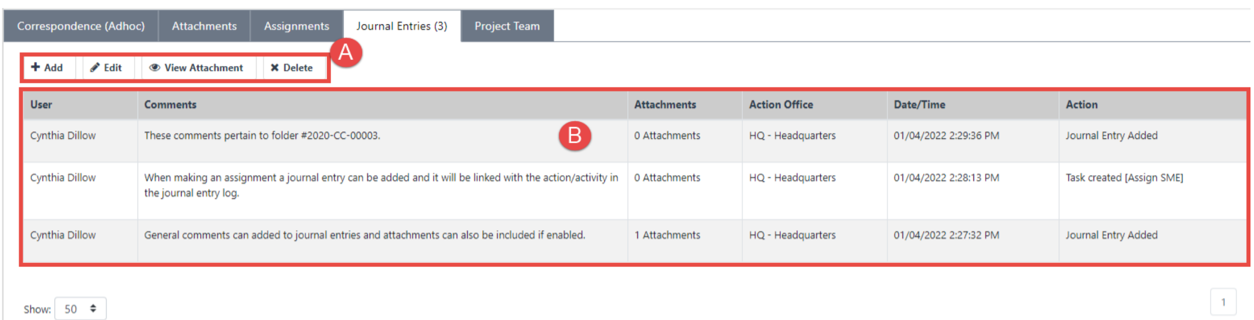
9. Click **Assign**. The pop up window refreshes to display *Journal Entries* workspace.
10. Enter the Journal Entries Comments in the text editor and click **Continue**.

## 3.4 Journal Entries Tab

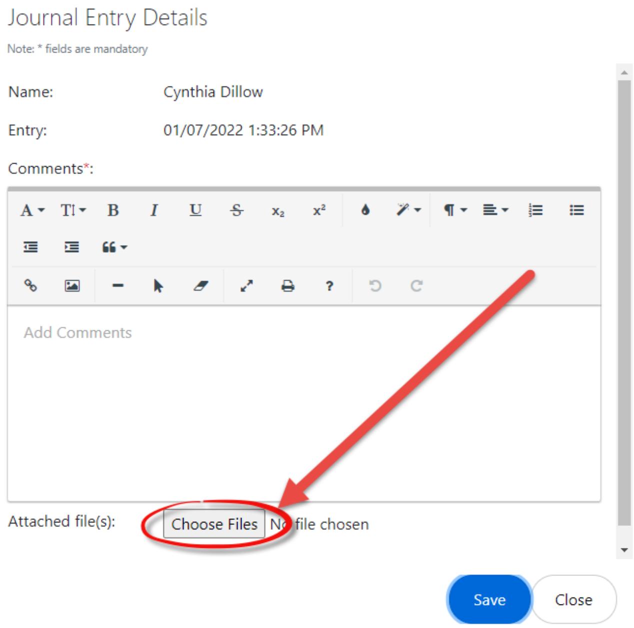
The *Journal Entries* tab is used to create a notes log for the case folder. Journal Entries can be added manually or when prompted while starting or continuing a workflow task. Entries made during the workflow are automatically updated in the Journal Entry tab and reference the associated task. From the *Journal Entries/Comments* tab, you can:

- Add a new Journal Entry
- Edit a Journal Entry
- View attachments added to Journal Entries
- Delete a Journal Entry

The *Journal Entries* tab features a set of **(A)** action buttons, which allow you to perform actions directly upon journal entries in **the (B)** workspace.

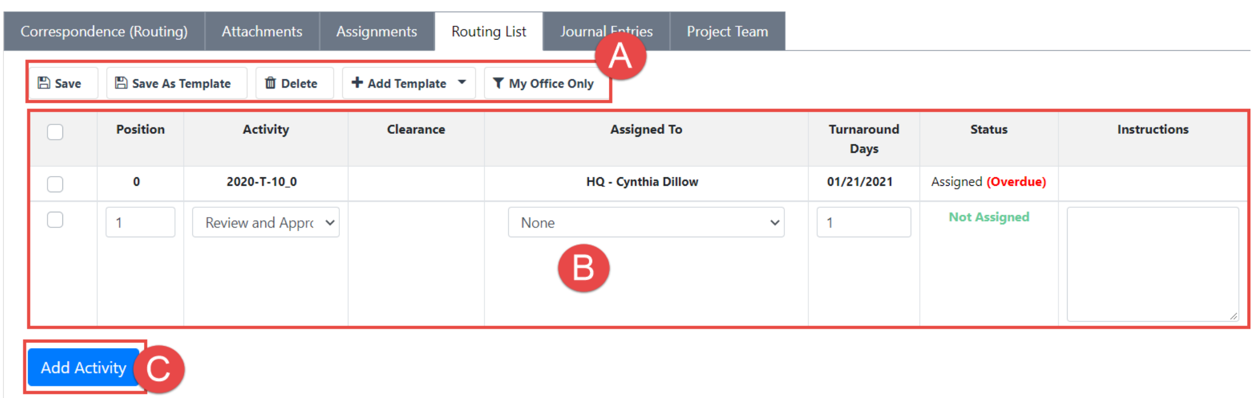



You can attach a document to the Journal Entry during creation. From the *Journal Entry Details* window, click the **Choose Files** button and select the attachment.




## 3.5 Routing List Tab (If Enabled)

The *Routing List* tab is unique to the Routing List correspondence type. Rather than utilize a conventional Assignments tab, this tab is used to create the routing path for the specific folder.




The Routing List tab features **(A)** an *Action* bar, where you can add, delete, save, and sort templates in the **(B)** *Workspace*.

Additionally, it features the **(C) Add Activity** button, where you can create new tasks. Once the routing list steps are prepared, you can begin the workflow by clicking **Actions > Start**. Moving to the *Assignments* tab then provides a view of the tasks configured for the folder and a view of each task status.

### 3.5.1 Add Activity

Follow the steps below to add an activity to a Routing List workflow:

1. On the *Routing List* tab, click **Add Activity**.
2. Select an Activity from the drop-down list, assign a user/group/queue in the *Assigned To* field, Set the **Turnaround Days** for each assigned activity, and add any instructions for the assignment.
3. You can click the **My Office Only** button to refresh the tab and only display the Routing List Activities assigned to users in your office. Click the **Show All** button to return to the full Routing List tab view.

**(!!) Notes:**

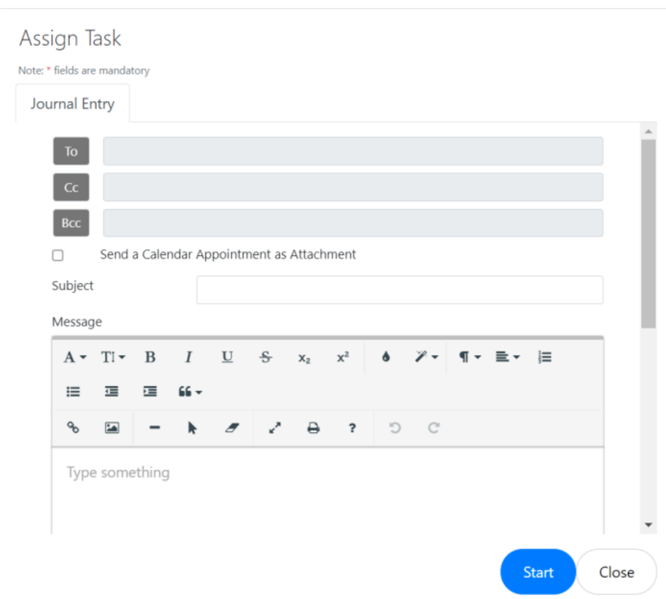
- **After the Routing List has been created and saved, the selected activities are also visible in the Assignments tab. You can complete assigned individual tasks from the Assignments tab.**
- **Additional activities can be added to the routing of the case folder at any time.**

### 3.5.2 Complete Routing List Task

To complete a Routing List task has been assigned to you:

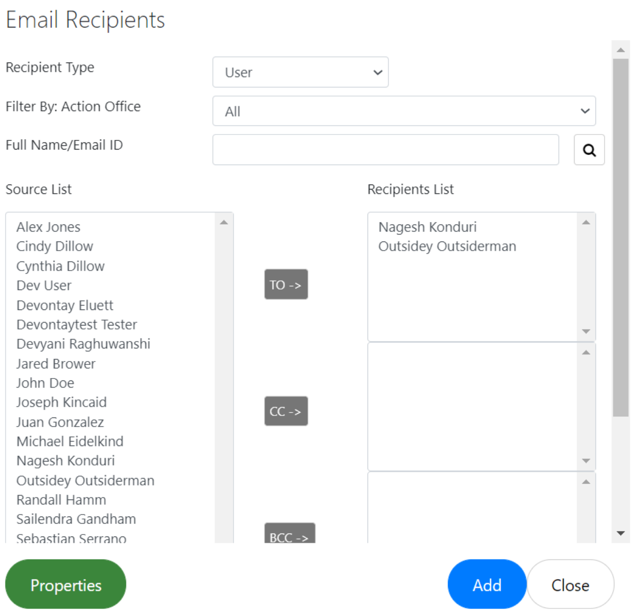
1. Open the assigned Case Folder and navigate to the Routing *List* tab.
2. Click **Actions > Continue**. The *Assign Task* window appears. This window can be prepopulated with recipient and body information or can be manually completed.

**(!!) Note: If the Routing List workflow has not been started, instead click Actions > Start.**




3. Click the **To** button. The *Email Recipients* window appears.

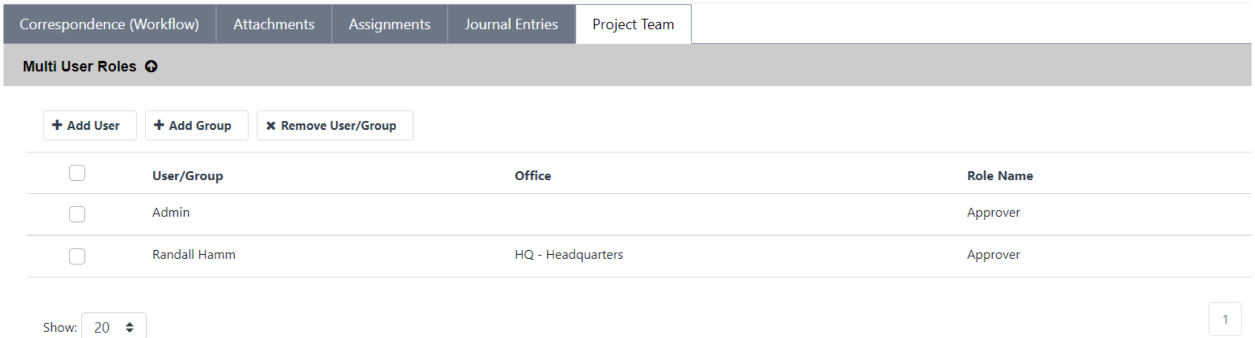
4. Select the Recipients of the message and click **To ->**. The selected Users appear in the *To* recipients list. Repeat this step for both the CC-> and BCC-> recipients list.




5. Once the message recipients are selected, click **Add**. The window closes and the selected recipients appear in the *To/CC/BCC* fields.
6. Click the **Send a Calendar Appointment as Attachment** checkbox to include an Outlook calendar appointment attachment alongside the message, if desired.
7. Use the Text Editor to configure the message content.
8. Click **Start** to send the message and begin the next step in the Routing List workflow. The assigned recipients are notified that they have been assigned the task and must log in to complete their assigned task.

## 3.6 Project Team Tab (If Enabled)

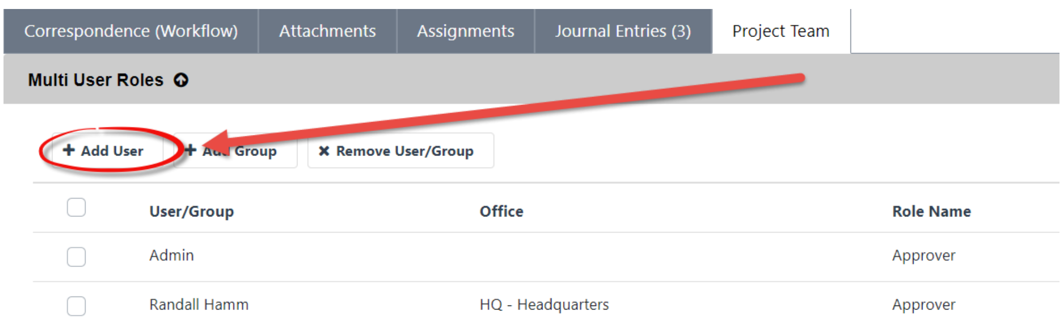
The Project Team tab allows you to view a list of users/groups with access to this Correspondence folder, as well as assign or remove users/groups to folder roles. These roles provide different levels of access to the case folder and file attachments. Only authorized users can update members in the Project Team tab.




## 3.6.1 Add User to Correspondence Folder

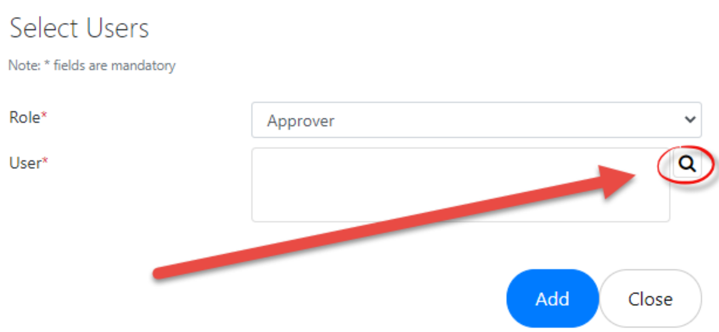
To add a user to this Correspondence folder:

1. Navigate to the *Project Team* tab, and in either the *Single User Roles* or *Multi-User Roles* workspaces, click **Add User**.

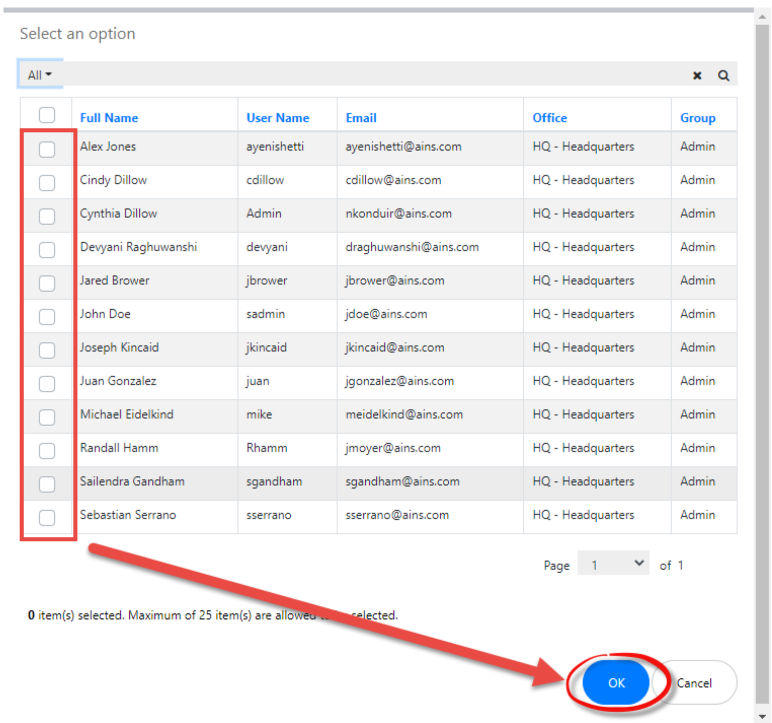



2. The *Assign Role* window appears. Select a **Role** from the *Role* drop-down list.


3. The window refreshes and the *User* field appears. Click the **User** lookup. The window refreshes to display a list of eligible users/groups.




4. Click the **checkbox** next to the user you'd like to select and click **OK**.

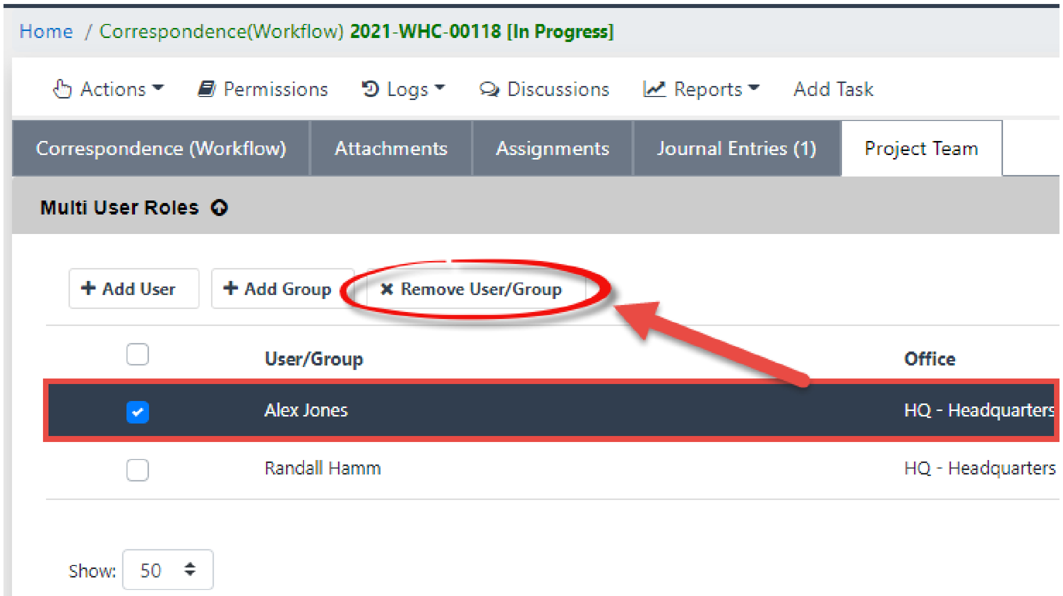



5. The selected user appears in the User field. Click **Add.**
6. The window closes, and the selected user appears in the *Project Team* tab, featuring the assigned roles(s).

### 3.6.2 Remove a User/Group

To remove a user/group:

1. Navigate to the *Project Team* tab, and in either the *Single User Roles* or *Multi-User* Roles workspaces, select the user to remove and click **Remove User/Group**.




2. The page refreshes and the selected user/group is removed from the role.

# 4 Correspondence Tracking Processes

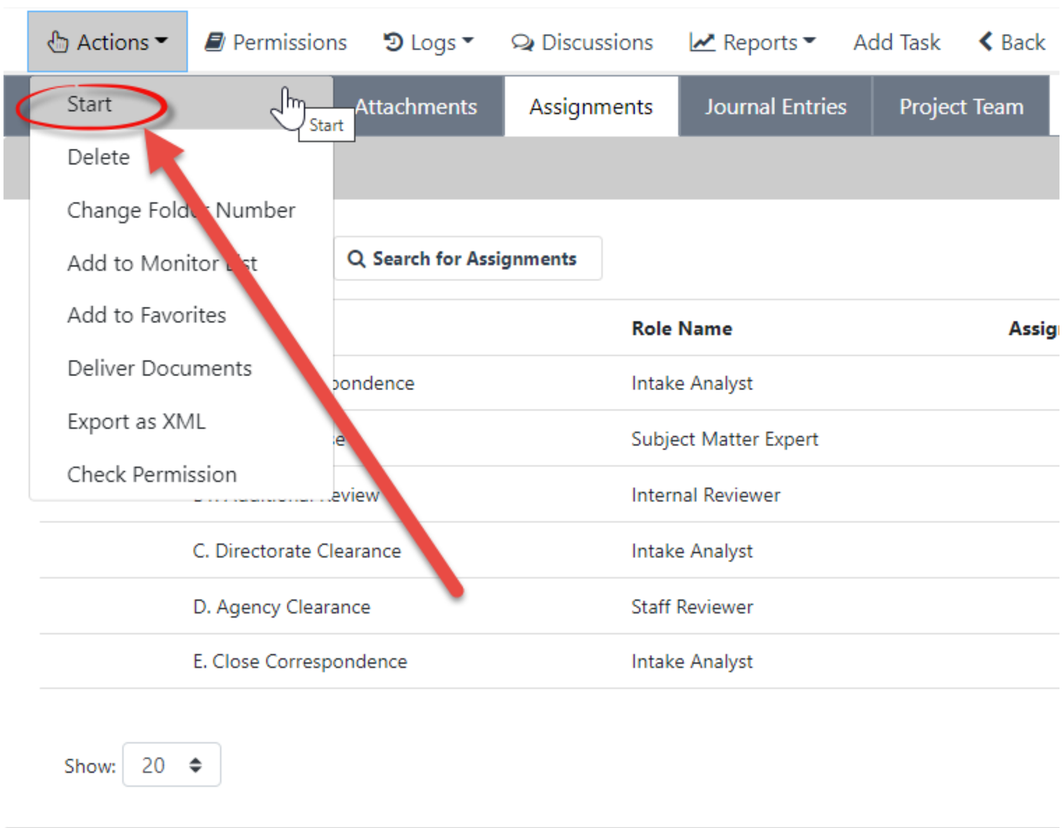
## 4.1 Advance the Correspondence Tracking Workflow

eCASE Correspondence Tracking advances case folders through one of several workflows by assigning and tracking tasks on the *Assignments* tab. The subsections below describe common workflow tasks required to complete a case folder.

### 4.1.1 Start Workflow

Follow the steps below to start a new workflow:

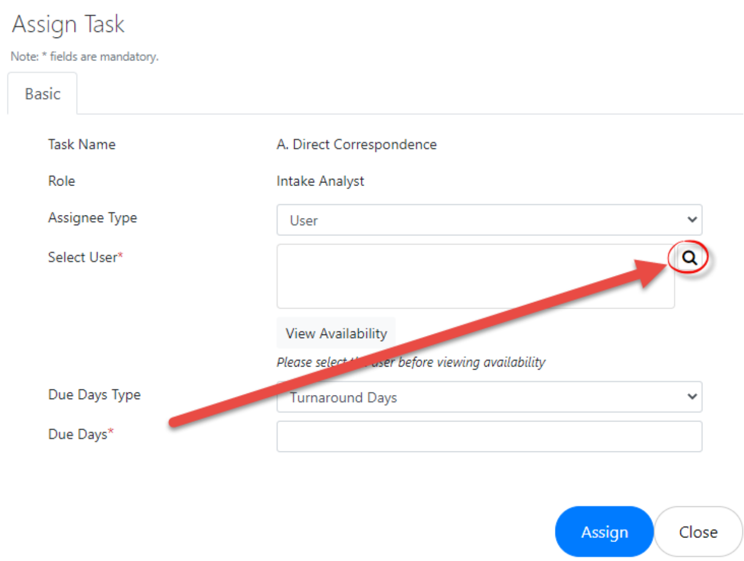
1. Open the case folder where you'd like to start the workflow and select **Start** from the *Actions* drop-down list.




**(!!) Note: If your application is configured to begin the workflow after saving the folder, then you are not required to start the workflow manually.**

2. The *Assign Task* window appears. Select the **Assignee Type** from the drop-down list. Selections can include: Users, Groups, or Queues.

3. Click the **Select User/Office Queue** lookup and select the user or office queue to assign the task. Click **OK**. The selected user/group/queue appears in the *Select User* field.

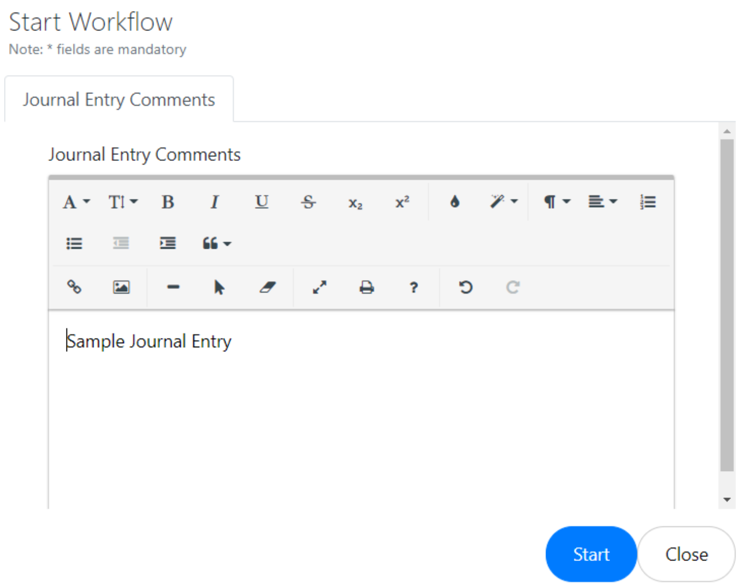



**(!!) Note: If an Ad hoc Workflow is being utilized, you need to select the Task Name fro m the Task Name drop-down list. Standard workflows will have the task to be assigned already populated.**

4. Select the **Due Days Type** from the drop-down list.
5. Enter the number of **Due Days** or **Planned Due Date** in the field.
6. Click **Assign**. The window refreshes to display a new tab that depends upon the current workflow step.

**(!!) Note: Consult the Assign Task Interface section for additional information regarding the Assign Task Interface tabs.**

7. Complete any required fields or enter the requested information in the workspace, then click **Start**.




**(!!) Note: The Start Workflow window may include a Task Instructions, Journal Entries, and/or an Email Notification tab. The tabs present in this window depend on your configuration. Content in these tabs must be populated prior to clicking Start.**

8. The window closes, and the task is assigned to the designated user.

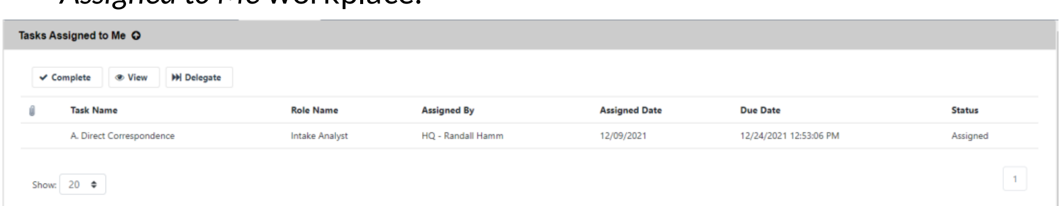
### 4.1.2 Continue/Complete Task

There are two ways to complete tasks assigned to you. You can either:

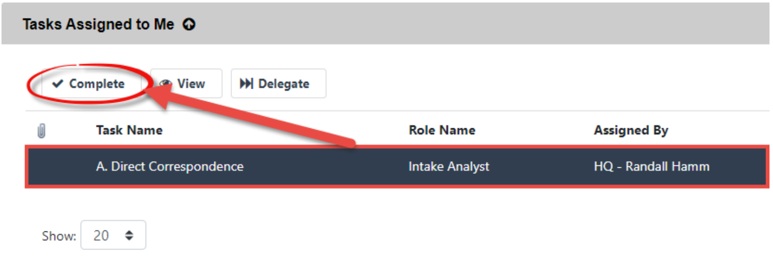
- **Continue**: Completes the assigned task and automatically progresses to the next stage in the workflow.
- **Complete and Create Task**: Completes the assigned task and allows you to create the next task and assign it to another user. This is only available in Ad Hoc correspondence folders.

To continue a workflow/complete a task assigned to you:

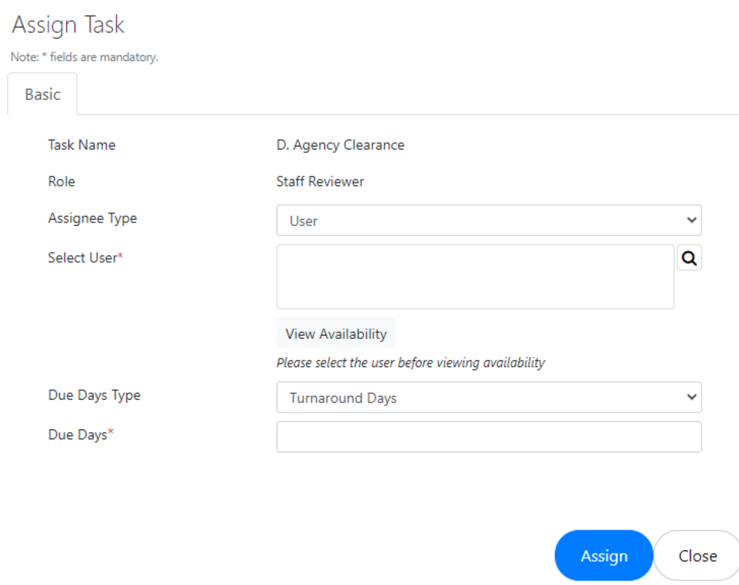
1. Navigate to the *Assignments* tab of the case folder. Any assigned tasks appear in the *Tasks Assigned to Me* workplace.



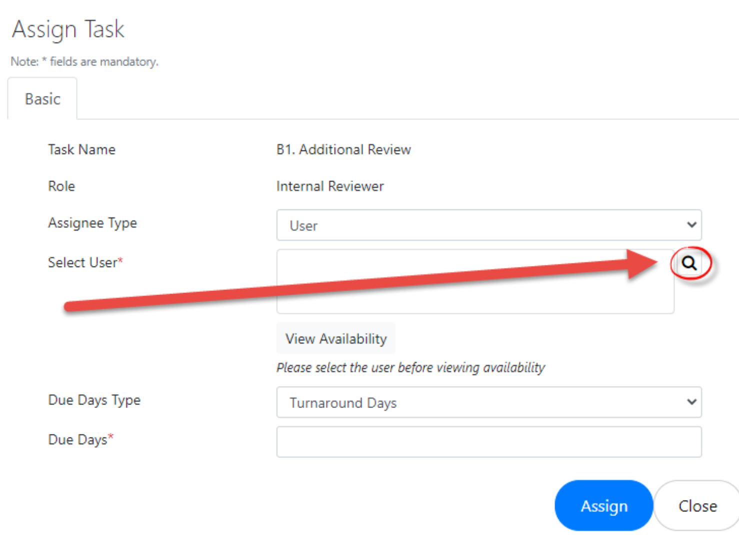

2. Select the assigned task, and then click **Complete**.



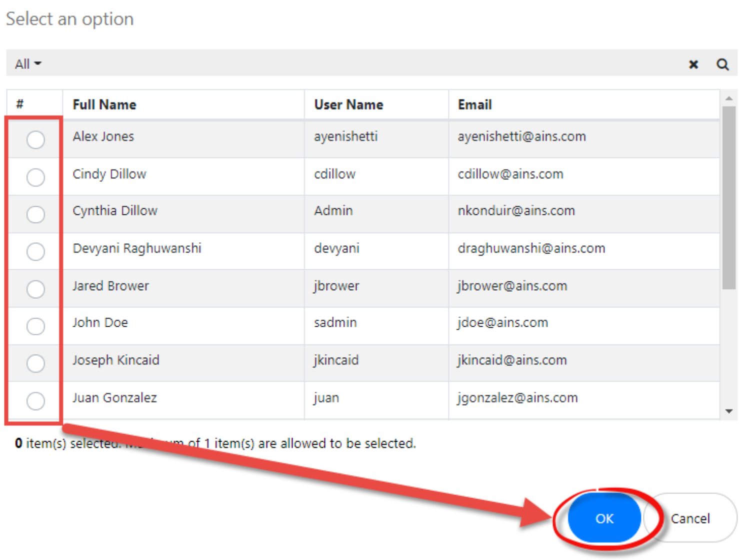

3. The *Assign Task* screen appears. Select the **Assignee Type** from the drop-down list.



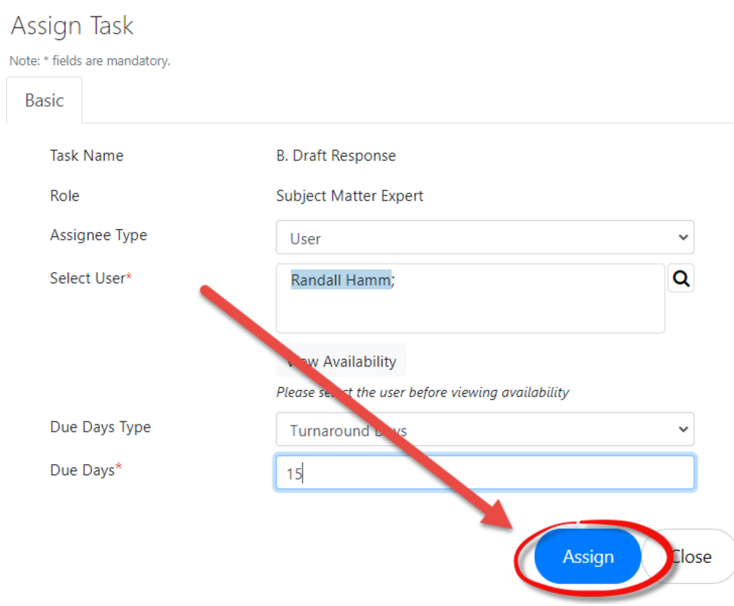

4. Click the **Select User** lookup.



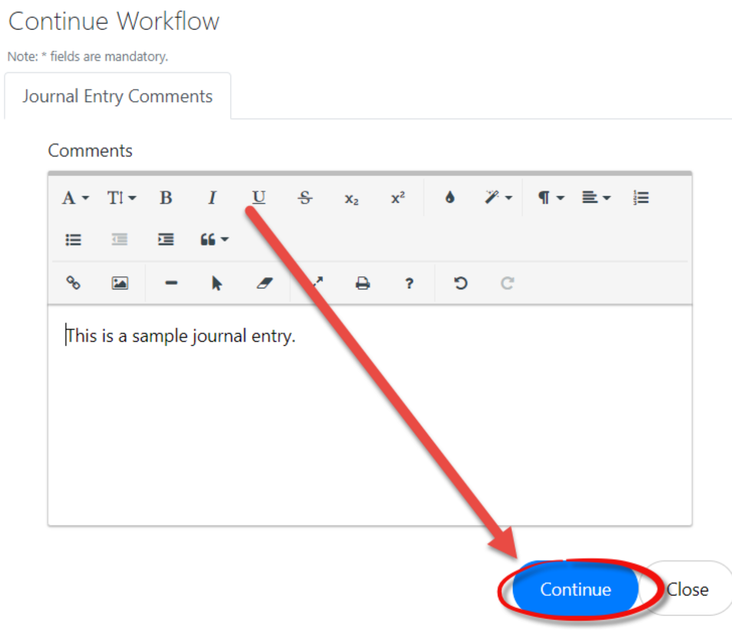

5. The screen refreshes to display a list of eligible assignees. Click the radio button adjacent the assignee and then click **OK**.




6. The window refreshes to display the *Assign Task* workspace. The selected user appears in the *Select User* field. Select the **Due Days Type** from the drop-down list.
7. Enter the number of **Due Days** in the field and click **Assign**.




8. The window refreshes to display a *Journal Entry Comments* workspace. Enter the journal entry in the text editor and then click **Continue**.

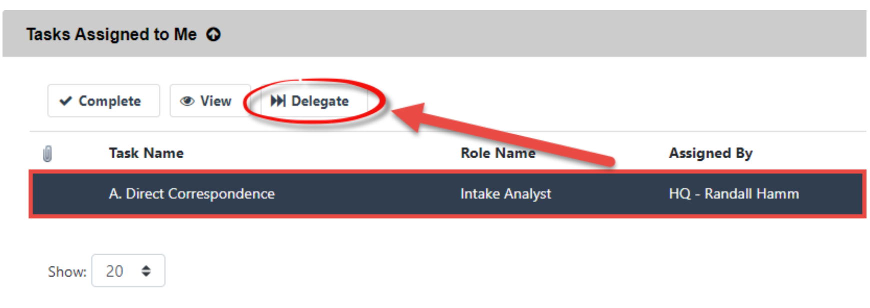



9. The window closes, and the task is assigned to the selected user.

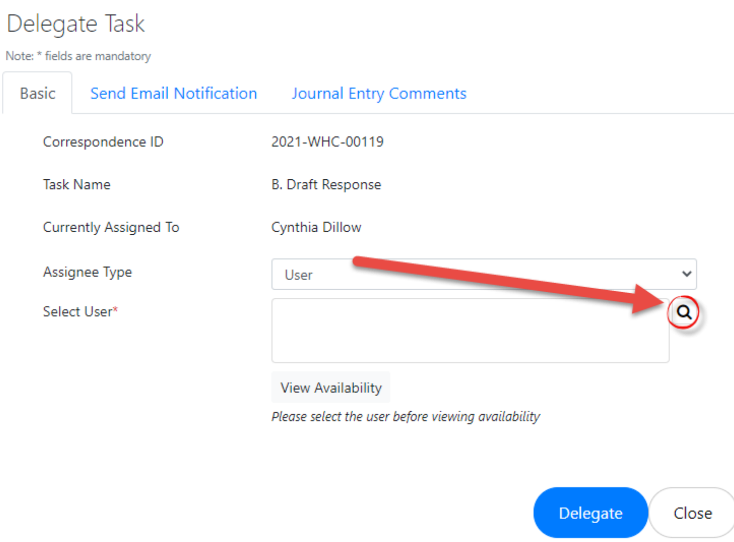
### 4.1.3 Delegate Task

Complete the steps below delegate a task:

1. Navigate to the *Assignments* tab of the case folder. Any assigned tasks appear in the *Tasks Assigned to Me* workplace. Select the task and then click **Delegate**.

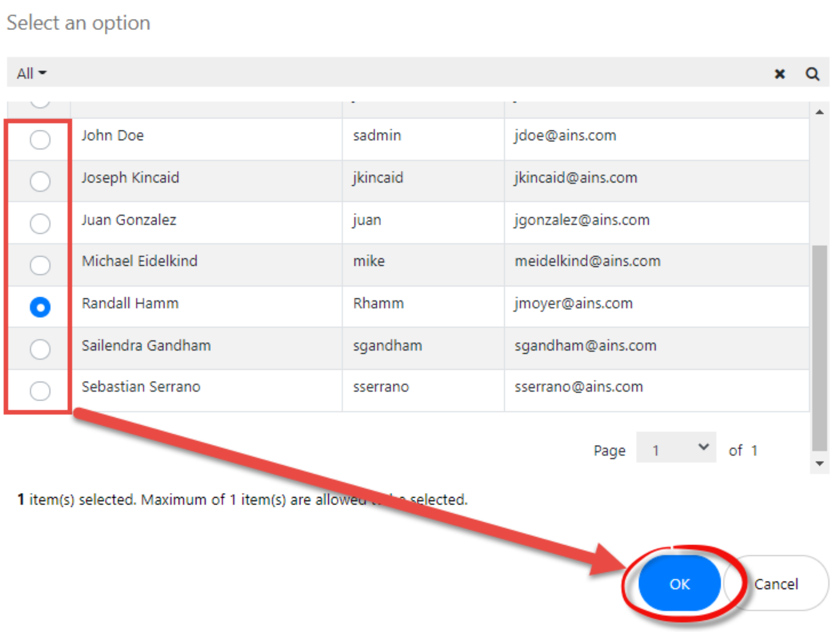



2. The *Delegate Task* screen appears. Click the **Select User** lookup.

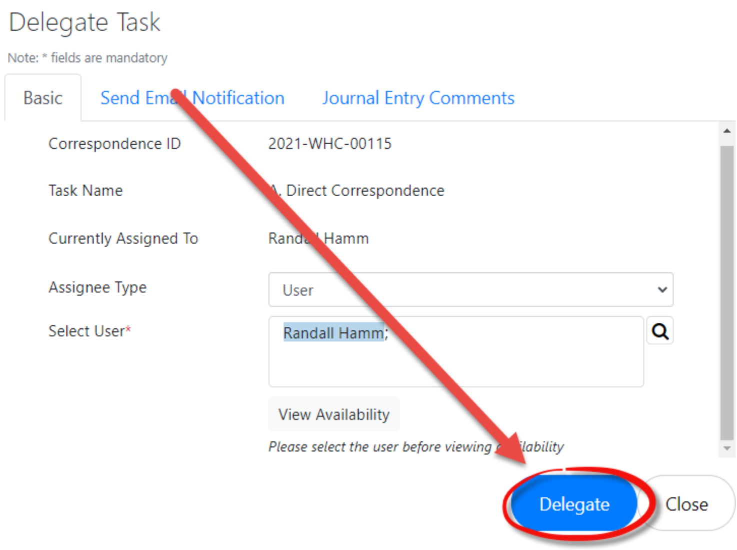



**(!!) Note: The Delegate Task screen also features additional tabs where you can configure the email notification that accompanies the assignment or log a Journal Entry to support the case folder. These features are described further in the Assign Task Interface subsection.**

3. The screen refreshes to display a list of eligible users. Click the **radio button** adjacent the user and then click **OK**.



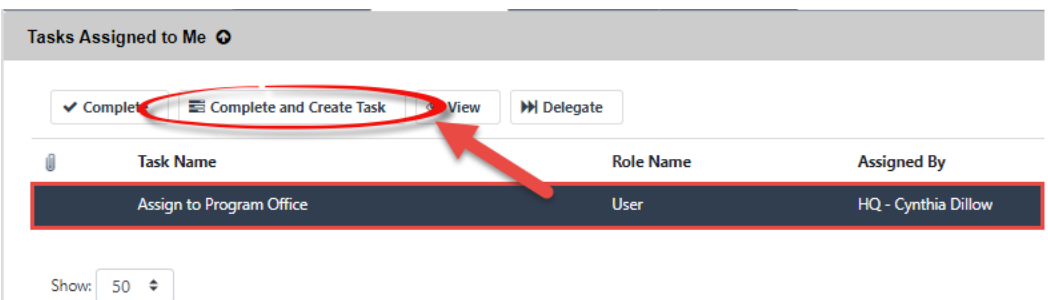

4. The workspace updates to display the full *Delegate Task* window, and the designated user appears in the *Select User* field. Click **Delegate**. The window closes, and the *Assignments* tab refreshes. The *Tasks Assigned To Me* workspace disappears, and the task is delegated to the selected user.



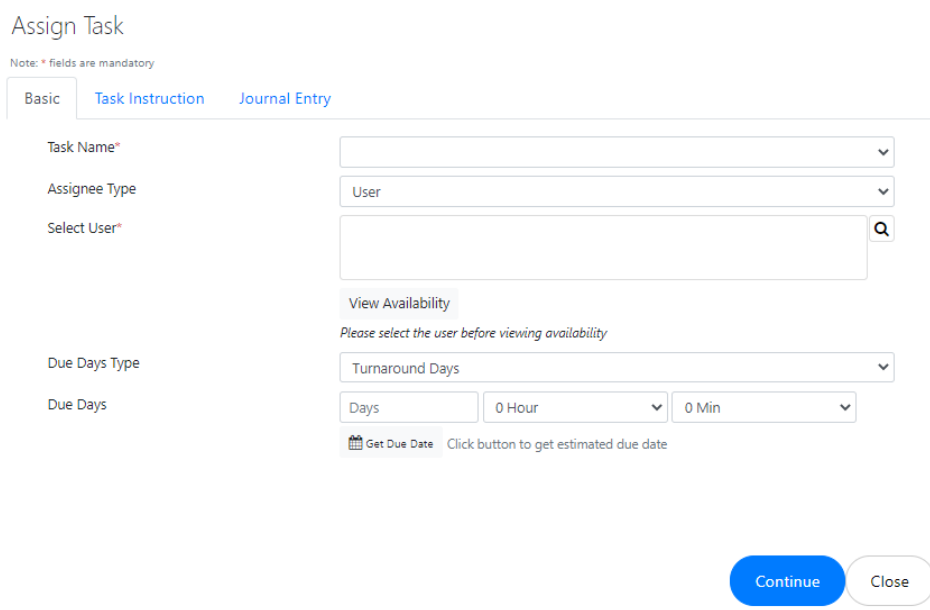

### 4.1.4 Complete and Create Task

The Ad Hoc workflow allows you to complete a task and then create a new one to assign to another user. Complete the steps below to complete and create a task:

1. Navigate to the *Assignments* tab of the case folder. Any assigned tasks appear in the *Tasks Assigned to Me* workplace. Select the task and then click **Complete and Create Task**.

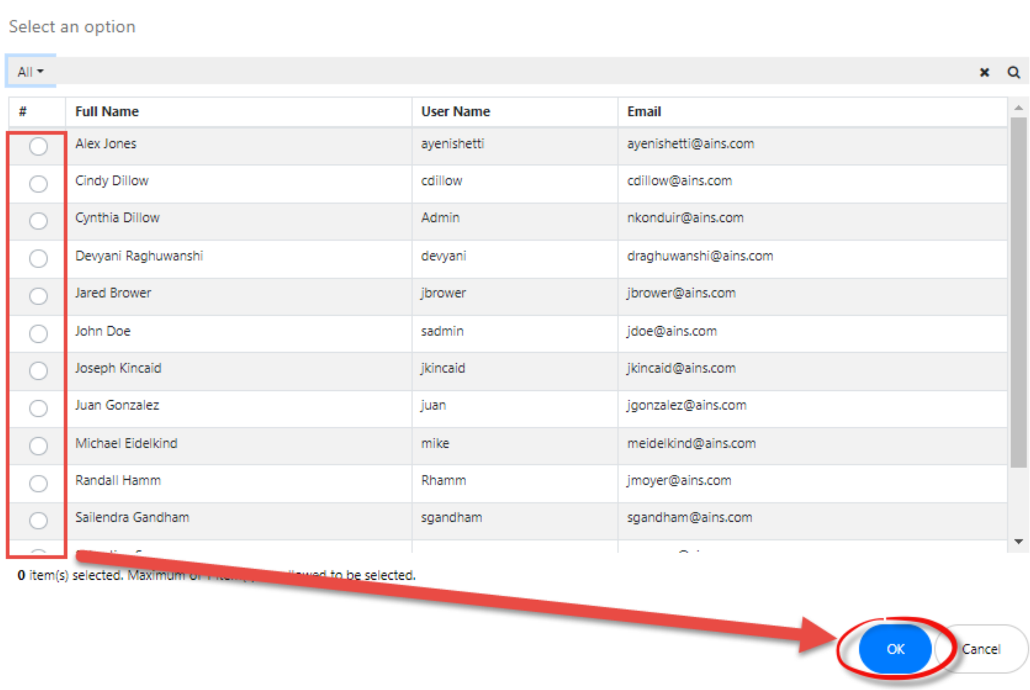



2. The *Assign Task* screen appears. Select the **Task Name** from the drop-down list.




**(!!) Note: You can select the Add New selection from this drop-down list to create a new ad hoc task. If you select Add New, the New Task screen appears. Enter the Task Name in the field and click OK.**

3. Click the **Select User** lookup to select the user who is assigned the task. The screen refreshes to display a list of eligible users.
4. Click the **radio button** adjacent the user and then click **OK**.



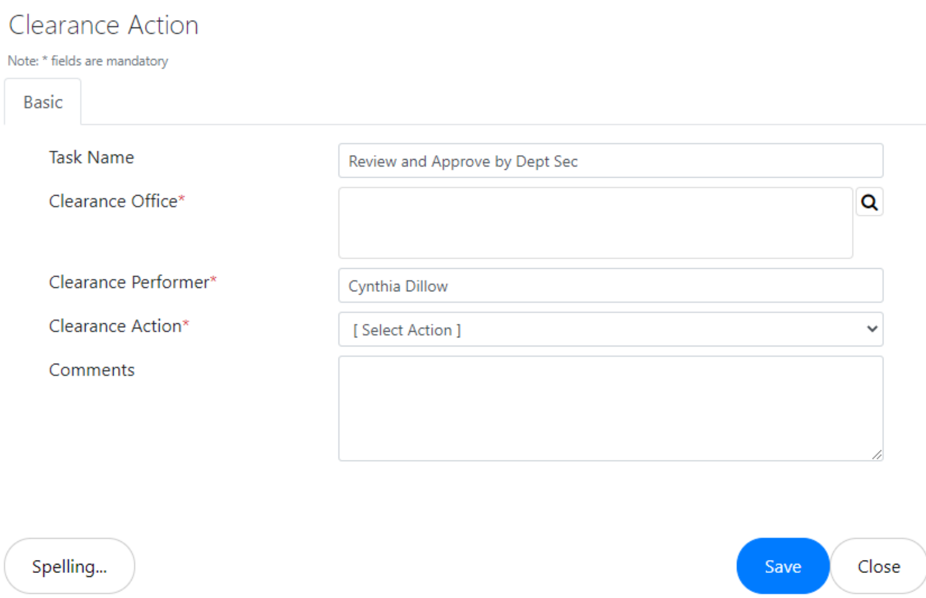

5. The selected user appears in the field. Select the type of **Due Days** from the drop-down list.

6. Enter the number of **due days** in the field. If desired, select the number of hours and minutes.
7. Click the *Task Instruction* tab and enter the task instructions in the free text field.
8. Click the *Email Notification* tab and configure the email message information.
9. Click the *Journal Entry* tab and enter the Journal Entry information in the free text field.
10. Click **Continue**. The screen closes and the task is assigned to the indicated user.

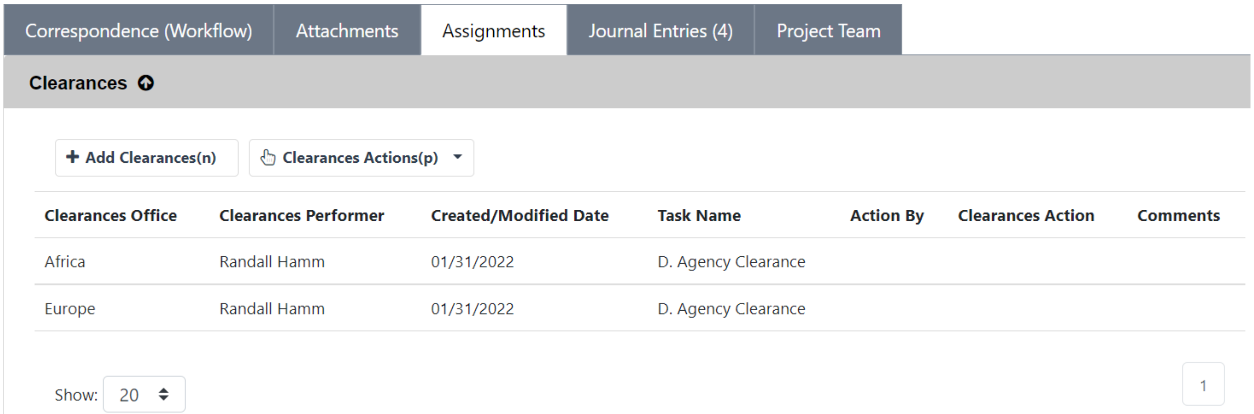
### 4.1.5 Clearance Actions

Clearance Actions can be configured to any task in a workflow/routing/ad hoc case folder. This feature is designed to provide clearance or concurrence on an activity. A clearance action is an approval required before a task can be continued. An authorized user must approve/reject the task. Using this feature creates an audit trail until a task is approved and maintains a record of status and comments for each rejection or approval.

Complete the required fields on the *Clearance Action* screen and click **Save** to assign the clearance action.




After creating Clearance Actions, they are listed within the Clearances section in the *Assignments* tab. You can select a Clearance from the list and take one of the following actions from the *Clearance Action(s)* drop-down:

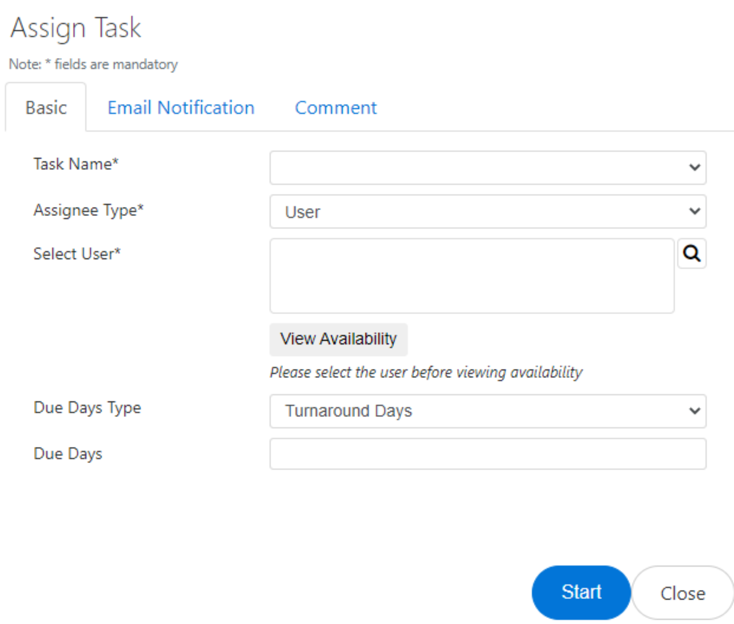



- Clearance Log: View the Clearance Log Details for the entry.
- Edit: Edit the selected clearance information.
- Take Action: Approve or reject the Clearance Action, or enter any comments.
- Delete: Permanently delete the selected clearance.
- Move Up: Reorder the selected clearance up in the workspace.
- Move Down: Reorder the selected clearance down in the workspace.

## 4.2 Assign Task Interface

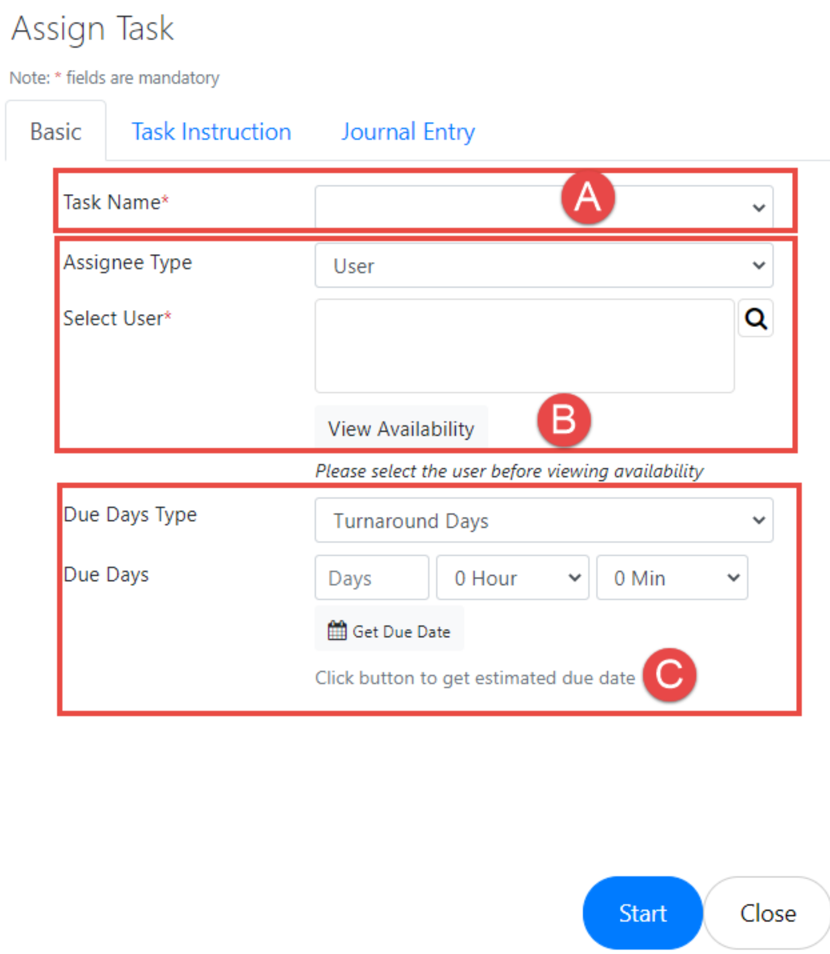
The *Assign Task* screen is where you can reassign or delegate tasks that have been assigned to you. You can select a preconfigured task from the *Task Name* drop-down list or create your own using the **Add New** drop-down list option. After the task is selected, you must determine who is assigned to the task, and then select that user/group using the fields in this window. Finally, the **Due Date Type** and number of **Due Days** must be selected before the task can be assigned.

**(!!) Note: The Assign Task screen features different tabs for each case folder type. Ad Hoc Correspondence features the Task Instruction and Journal Entry tabs. The Workflow case folder screen is shown below.**




## 4.2.1 Basic Tab Functionality

After a workflow is initiated, it must be assigned to a user to complete the first step. The *Assign Task* window appears when a workflow is started, or a task is assigned, and opens to the Basic tab. Generally, fields on this tab are grouped with other similar fields. The **(A)** *Task Name* drop-down list allows you to set the assigned task or create a new one from scratch. The **(B)** *Assignee* fields allow you to determine the user being assigned a task. The fields in the **(C)** *Due Days* section allow you to set the deadline for completing the task.




The fields on this tab are described below:

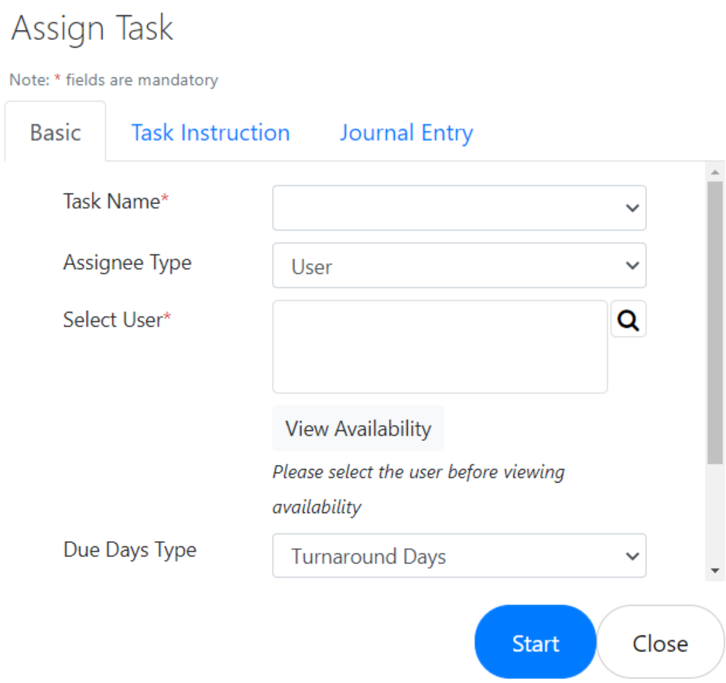
| Field | Description |
|---|---|
| **Task Name** | Select the task being assigned using this drop-down list.<br>You can create new tasks by selecting the **Add New** option. The Add New Task functionality is captured in the subsection below. |
| **Assignee Type** | Select the recipient of the assignment. |

| Field | Description |
|---|---|
| **Select User/Office/Office queue** | Click the lookup to select the specific recipient of the assignment. The options available in this field are determined by the Assignee Type selection.<br><br>The **View Availability** button activates after a user is selected, and clicking it allows you to view the selected user's calendar. |
| **Due Days Type** | Select the nature of the days until the task is due. |
| **Due Days** | Use the days/time picker fields to determine the specific number of days until the task is due.<br><br>If the *Due Days Type* is "Turnaround Days," the *Due Days* field is a simple numeric field.<br><br>If the *Due Days Type* is a "Planned Due Date," you must select the day from the calendar picker, and then the hour and minute using the adjacent drop-down lists. |

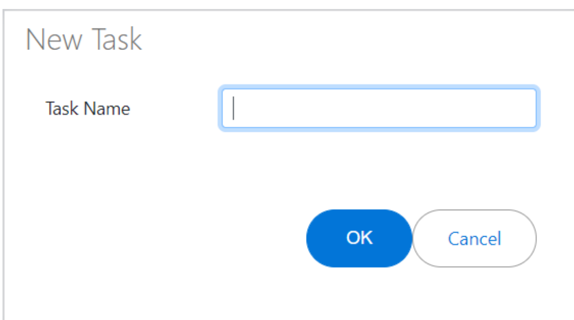
### 4.2.2 Add New Task Functionality

The Ad Hoc Case Folder permits authorized users to assign a task that is not already preconfigured in the application. To create a new task:

1. Navigate to the *Assignments* tab of the case folder.
2. If the workflow has not yet begun, select **Start** from the *Actions* drop-down list. The *Assign Task* screen appears.



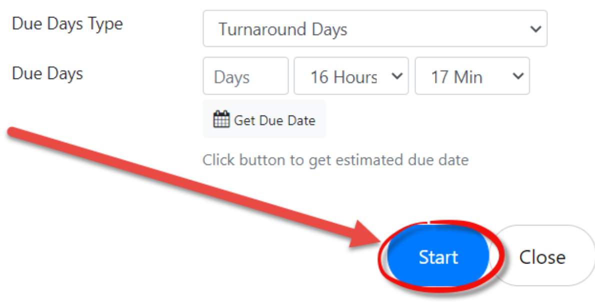

3. Select **Add New** from the *Task Name* drop-down list. The *New Task* screen appears.




4. Enter a **name** for the Task in the Task Name field. Click **OK**. The window closes, the screen refreshes, and the entered name appears in the *Task Name* drop-down list.
5. Select the **Assignee Type** from the drop-down list. The window refreshes to display a new field allowing you to select the *Assignee*.
6. Click the *Select Assignee* field and select the assignee.
7. Select the **Due Days Type** from the drop-down list.

**(!!) Note: This selection may change the Due Days field.**

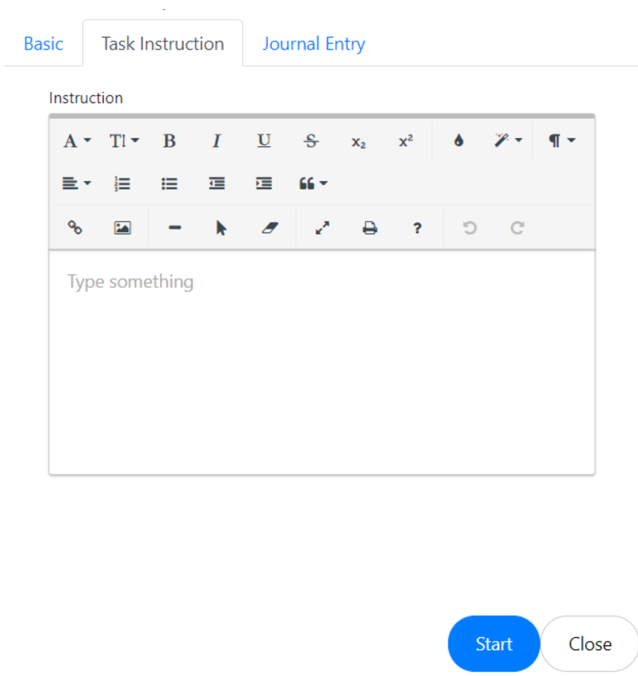
8. Use the calendar/time pickers to select the **due date**.
9. Click **Start**.




10. The window closes, the tab refreshes, and the newly created task appears in the *Assignments* tab workspace.

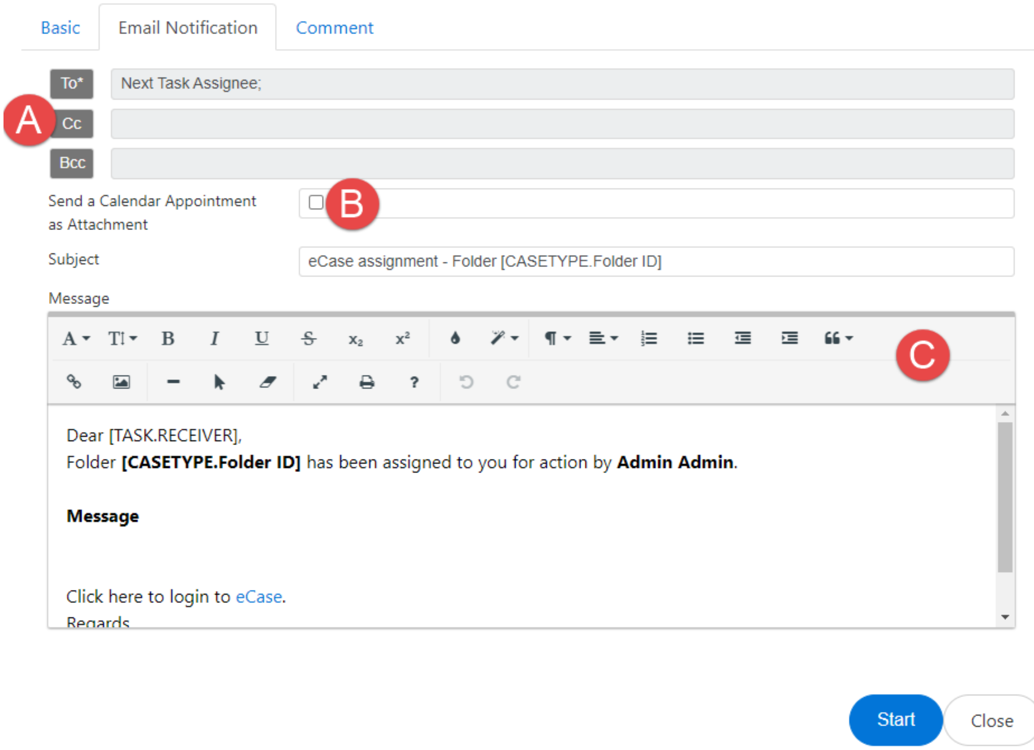
### 4.2.3 Task Instruction Tab

The *Task Instruction* tab is only available in Ad Hoc correspondence folders. On this tab you can use the text editor to enter any additional instructions regarding the assigned task. The Assigned User receives the entered instruction alongside the assigned task.



## 4.2.4 Email Notification Tab

The Email Notification tab is where you create the email message that is distributed by eCASE alongside the assigned task.




Use the **(A)** *Recipient* fields to determine who will receive the email message.

Configure the **(B)** *Subject & Calendar Appointment* fields.

Use the **(C)** text editor to create the message text or edit a template message to include more specific assignment information.

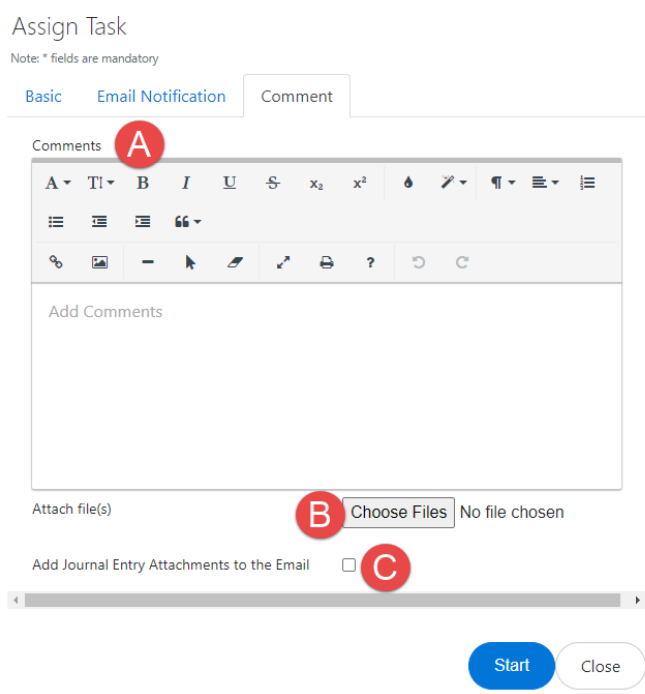
The fields on this tab are described below:

| Field | Description |
|---|---|
| **Send a Calendar Appointment as Attachment** | Include an MS Outlook calendar appointment with the message. |
| **Subject** | The focus of the message. |

| Field | Description |
| --- | --- |
| **Message** | Use the text editor to create a new message or alter a message template to reflect the specific details of this task. |

### 4.2.5 Comment/Journal Entry Tab

The *Comment/Journal Entry* tab is shown below:




Use the **(A)** *Text Editor* to create a comment or Journal Entry to include with the assignment. Users assigned to a task can reference information entered here to help complete their task.

You can add an attachment by clicking **(B) Choose Files**.

You can click the **(C) Add Journal Entry Attachments to the Email** checkbox to distribute attachments added in this window alongside the email message.

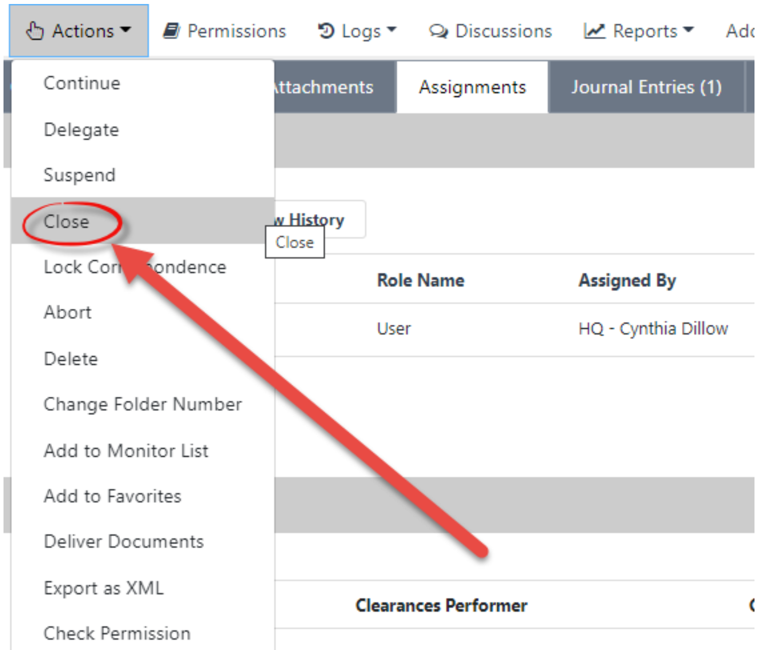
## 4.3 Closing a Correspondence Folder

The following subsections describe the processes to close a Correspondence folder with and without attachments.

## 4.3.1 Closing with Documents in Attachments Tab

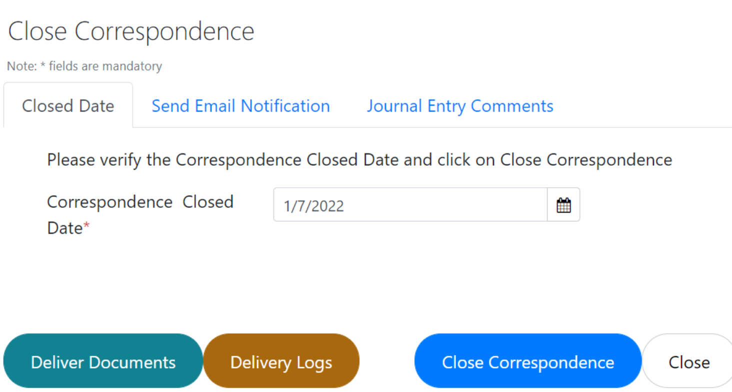
To close a Correspondence folder:

1. Navigate to the case folder. Select **Close** from the *Actions* drop-down.




**(!!) Note: Case Closing eligibility and actions are dependent upon your organization's workflow.**

2. The *Close Correspondence* screen appears. The *Correspondence Closed Date* field indicates today's date.

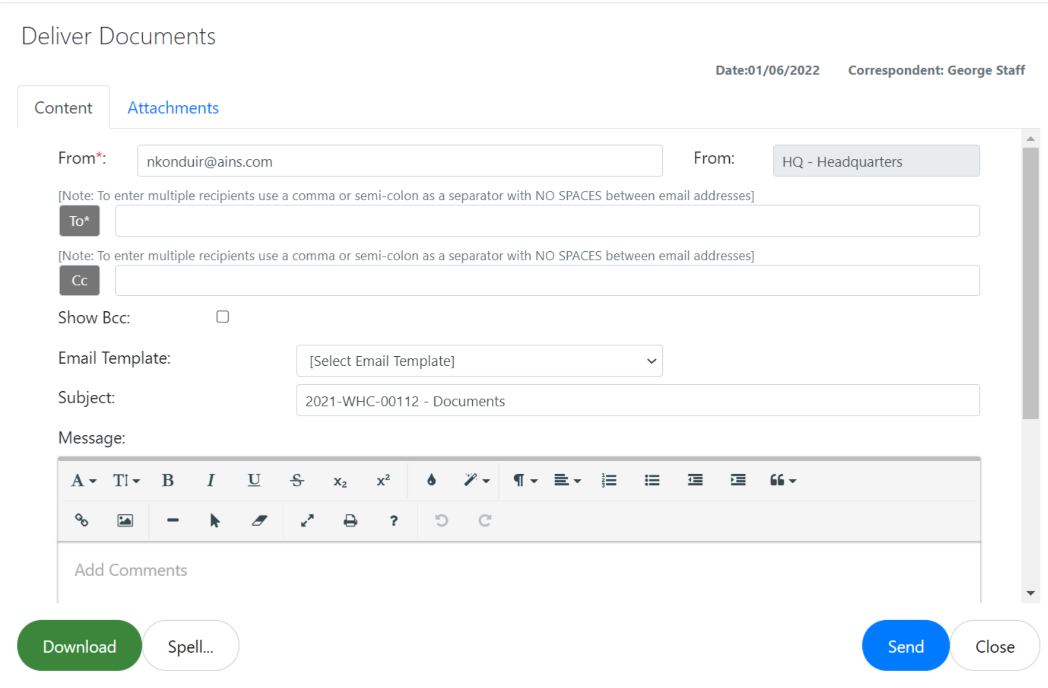



3. Click the **Send Email Notification** tab to configure the email notification sent by the application when this case folder is closed.
4. Click the **Journal Entry Comments** tab to configure the journal entry that is added to the case folder when this case folder is closed.

5. Click **Close Correspondence**.
6. A confirmation message appears, asking if you would like to deliver the case folder documents first. Click **OK** to deliver documents.

**(!!) Note: A confirmation pop-up window appears if documents have been uploaded to the Attachments tab.**

7. The *Deliver Documents* screen appears. Use the *To/CC/BCC* fields to configure the message recipients.




8. If desired, select an **Email Template** from the drop-down list. The selected template appears in the *Message* field.
9. Use the text editor to compose or edit the Message content.
10. Click the **Return Receipt** checkbox to prompt the system to send a Return Receipt.

**(!!) Note: A return receipt is a message indicating that the message recipient has opened the message.**

11. Enter any **Comments** in the field, if desired.
12. Click the *Attachments* tab and click the checkbox adjacent the documents you want to deliver.

**(!!) Note: If desired, you can download the documents on the Deliver Documents screen. In the Attachments tab, click the checkbox adjacent the documents and then click Download.**

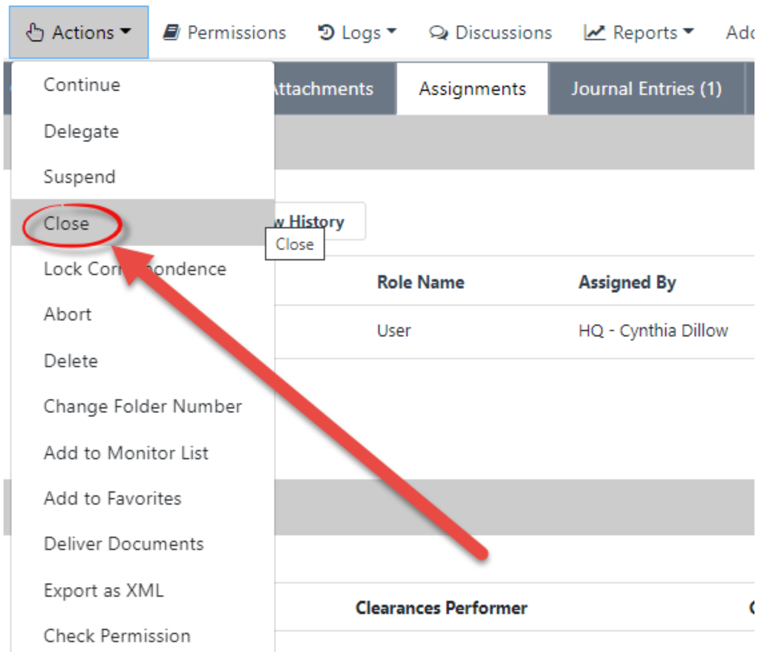
13. Click **Send**. The window closes, and the document delivery message is sent to the recipient.

14. Click **Close Correspondence**. The window closes and the closed date of the case folder is updated to reflect the date entered in the Correspondence Closed Date field. The Case Folder is now in Closed status.

### 4.3.2 Closing Without Documents in the Attachments Tab

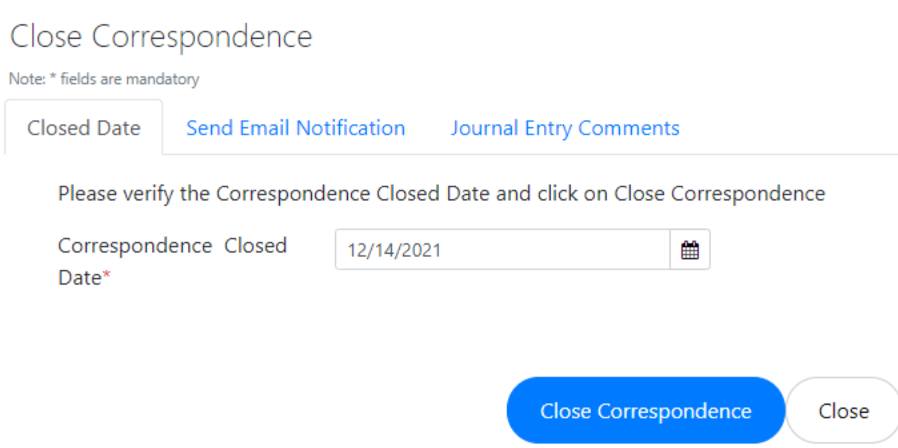
To close a case folder:

1. Navigate to the case folder. Select **Close** from the *Actions* drop-down list.



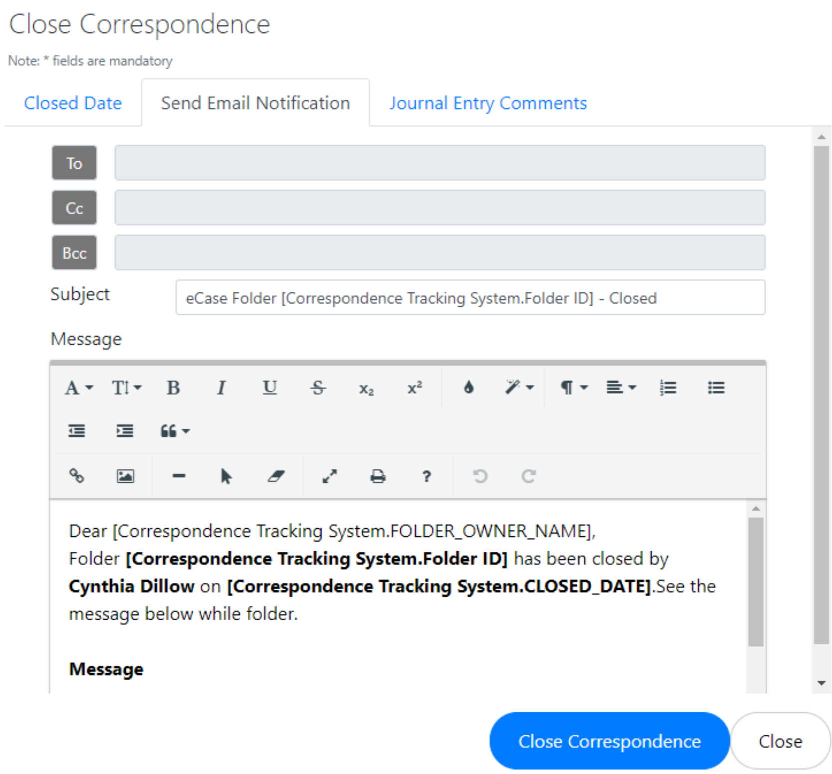

**(!!) Note: Case Closing eligibility and actions are dependent upon an organizations workflow.**

2. The *Close Correspondence* screen appears.




3. The **Correspondence Closed Date** field is automatically populated with today's date. If necessary, alter this field to capture the Correspondence Closed Date.

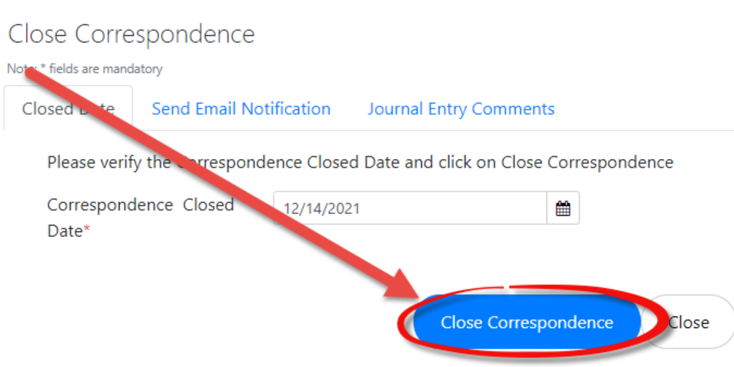
4. You may send an email notification alongside the case folder closing notifications by clicking the **Send Email Notification** tab. Use the **To/CC/BCC** fields to configure the message recipients. Use the text editor to update the prepopulated message template.




5. Optionally, click the **Journal Entry/Comments** tab to record any Closing Journal Entry Comments. Use the text editor to record the journal entry comments. Journal Entries/Comments added using this screen are recorded in the Journal Entries/Comments tab after closing the case folder.

**(!!) Note: You can upload any attachments to this Journal Entry by clicking Choose Files and selecting an attachment file.**

6. After the content in the *Send Email Notification* and *Journal Entry Comments* tabs are configured, click **Close Correspondence**.



7. A confirmation message appears. Click **OK** to close the Correspondence.
8. After clicking **OK**, the window closes, and the case folder refreshes. The case folder is now in *Closed* status.

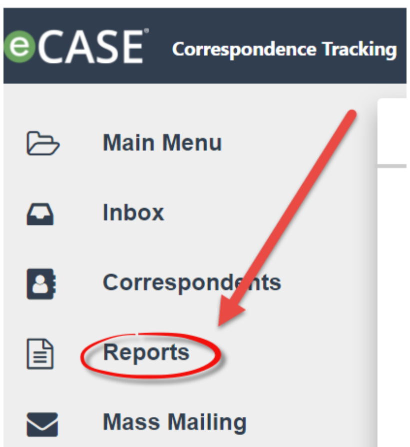
# 5 Reports

Reports provide detailed information about different folders and tasks that can be used to track information by date or period, contact information, users working on folders, and task details under each folder.

You can also:

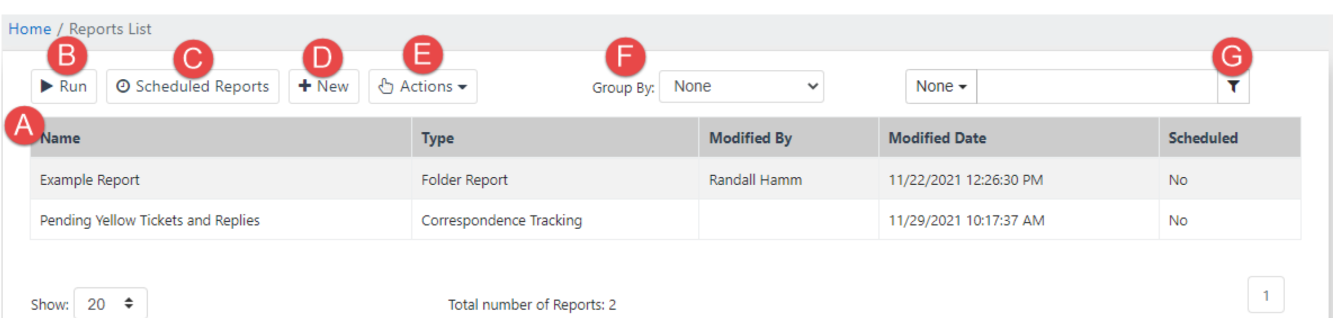
- Generate reports automatically at scheduled times,
- Print reports,
- Share reports via email;
- Export reports in various formats (including MS Word, Excel, HTML, and CSV)
- Filter the information as needed.
- Create custom reports to show specific information as needed.

In this application, Reports can be executed by selecting **Reports** from the *Launch Pad*.




## 5.1 Reports Interface

The Reports interface and functionality is captured below:

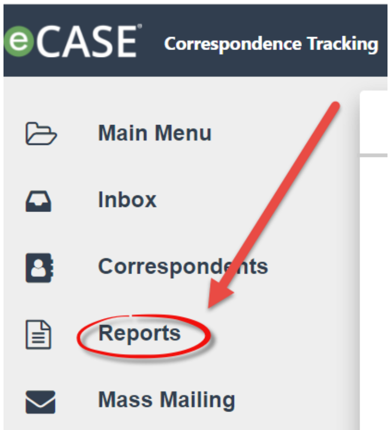


| Ref | Feature | Description |
|---|---|---|
| A | Reports List | The workspace displays a list of all reports available to you in this eCASE application. This list includes details, such as the report *Name*, *Type*, and *Scheduled* status, as configured by your administrator. |
| B | Run | Click this button to run a report selected from the *Reports List.* |
| C | Scheduled Reports | View of list of scheduled reports, which are predefined reports that are run at user-defined times according to your needs. |
| D | New | Create a new report from application data using criteria available to you. There are options to run a **Folder Report**, **Query Report**, **Task Report**, **Processing Times Report**, **Volume Report**, or **Application Report**. |
| E | Actions | Use the drop-down list to take actions on a report selected from the Reports List. There are options to **Edit** an existing report, **Delete** a report, **Share Report** with others, or **Add to Favorites** to add this report to the *Favorites* widget on the *Home Screen*. |
| F | Group By | Use the drop-down list to group the *Reports List* according to their attributes. There are options to group by report **Type** or who the report was **Modified By**. |
| G | Filter | Use the *Filter* options to filter by the report **Name**, **Type**, or who the report was **Modified By**. Enter specific terms in the text field and click the **Filter** to view filtered reports. |

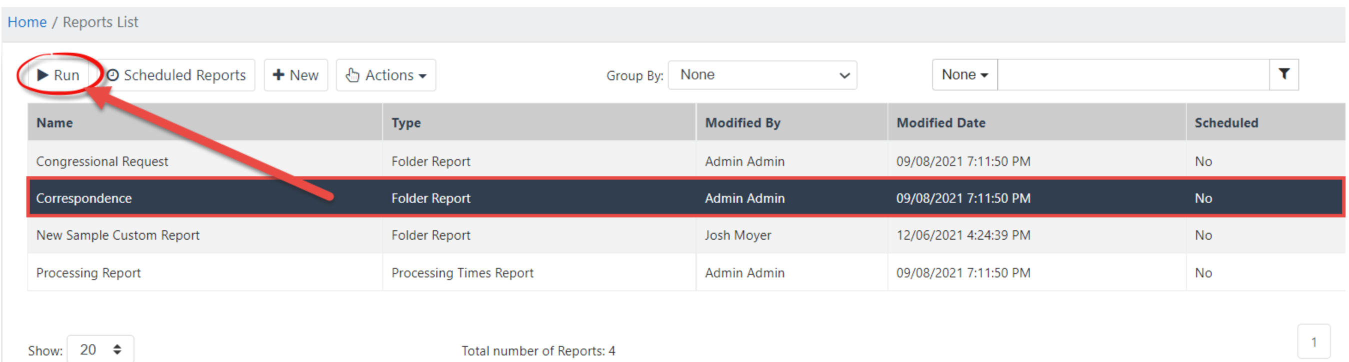
## 5.2 Run a Report

To run a preconfigured report:

1. Log in to the application and click **Reports** from the *Launch Pad*.

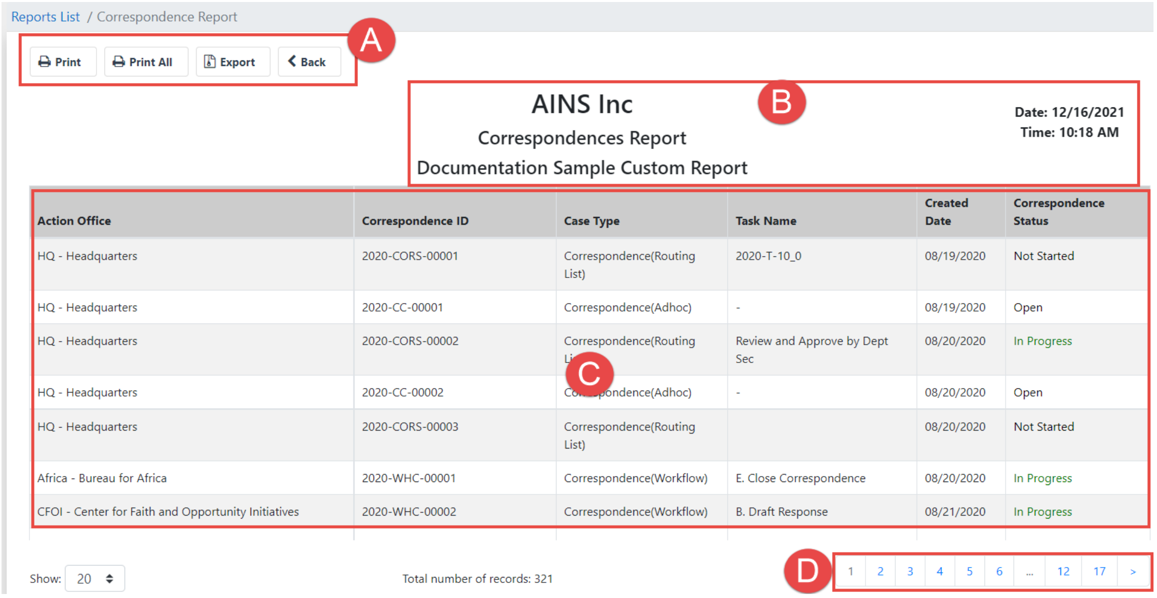



2. The page refreshes to display the *Report List*. Select a report from the list and click **Run**.




3. The page refreshes to display a document reporting the user selected fields.

The image below displays an annotated version of a report output. A set of **(A) action buttons** appear at the top of the page, allowing you to perform actions directly upon the report results. Your Organization Name, type of report, name of report, and date information appear in the **(B)** *Report header*. The **(C)** *Results* of the report are displayed in the reports workspace. Click a **(D)** *page number* to view a different page of the report results.



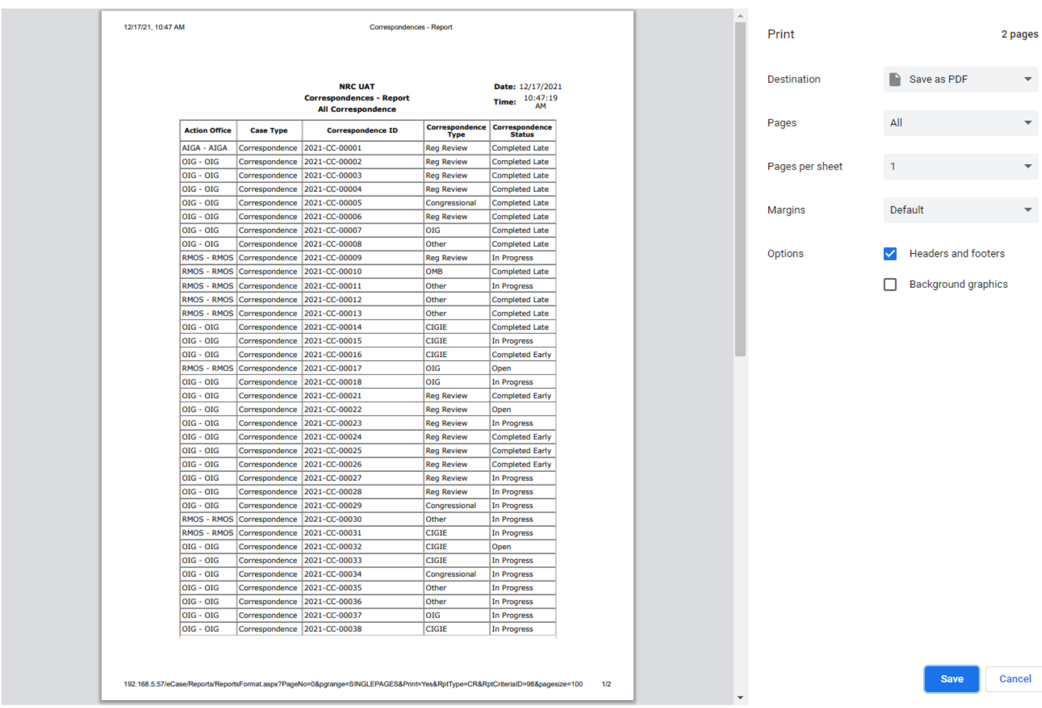

AINS Inc
Correspondences Report
Documentation Sample Custom Report

Date: 12/16/2021
Time: 10:18 AM

| Action Office | Correspondence ID | Case Type | Task Name | Created Date | Correspondence Status |
|---|---|---|---|---|---|
| HQ - Headquarters | 2020-CORS-00001 | Correspondence(Routing List) | 2020-T-10_0 | 08/19/2020 | Not Started |
| HQ - Headquarters | 2020-CC-00001 | Correspondence(Adhoc) | - | 08/19/2020 | Open |
| HQ - Headquarters | 2020-CORS-00002 | Correspondence(Routing List) | Review and Approve by Dept Sec | 08/20/2020 | In Progress |
| HQ - Headquarters | 2020-CC-00002 | Correspondence(Adhoc) | - | 08/20/2020 | Open |
| HQ - Headquarters | 2020-CORS-00003 | Correspondence(Routing List) | | 08/20/2020 | Not Started |
| Africa - Bureau for Africa | 2020-WHC-00001 | Correspondence(Workflow) | E. Close Correspondence | 08/20/2020 | In Progress |
| CFOI - Center for Faith and Opportunity Initiatives | 2020-WHC-00002 | Correspondence(Workflow) | B. Draft Response | 08/21/2020 | In Progress |

## 5.2.1 Print/Print All

After running a report, there are menu options allowing you to print the results of the report. To Print/Print All, click either the **Print** or **Print All** buttons. The *Print* interface appears:




12/17/21, 10:47 AM
Correspondences - Report

NRC UAT
Correspondences - Report
All Correspondence

Date: 12/17/2021
Time: 10:47:19 AM

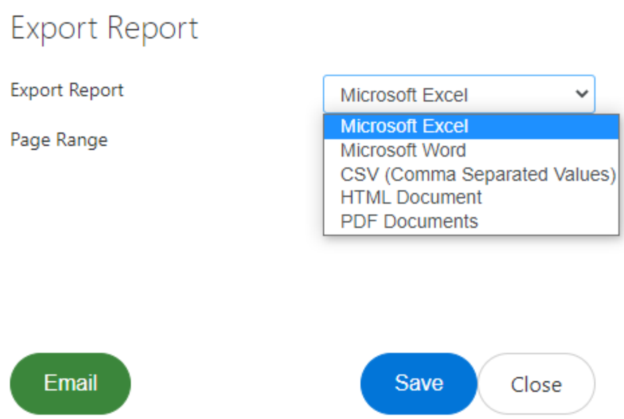
| Action Office | Case Type | Correspondence ID | Correspondence Type | Correspondence Status |
|---|---|---|---|---|
| AIGA - AIGA | Correspondence | 2021-CC-00001 | Reg Review | Completed Late |
| OIG - OIG | Correspondence | 2021-CC-00002 | Reg Review | Completed Late |
| OIG - OIG | Correspondence | 2021-CC-00003 | Reg Review | Completed Late |
| OIG - OIG | Correspondence | 2021-CC-00004 | Reg Review | Completed Late |
| OIG - OIG | Correspondence | 2021-CC-00005 | Congressional | Completed Late |
| OIG - OIG | Correspondence | 2021-CC-00006 | Reg Review | Completed Late |
| OIG - OIG | Correspondence | 2021-CC-00007 | OIG | Completed Late |
| OIG - OIG | Correspondence | 2021-CC-00008 | Other | Completed Late |
| RMOS - RMOS | Correspondence | 2021-CC-00009 | Reg Review | In Progress |
| RMOS - RMOS | Correspondence | 2021-CC-00010 | OMB | Completed Late |
| RMOS - RMOS | Correspondence | 2021-CC-00011 | Other | In Progress |
| RMOS - RMOS | Correspondence | 2021-CC-00012 | Other | Completed Late |
| RMOS - RMOS | Correspondence | 2021-CC-00013 | Other | Completed Late |
| OIG - OIG | Correspondence | 2021-CC-00014 | CIGIE | Completed Late |
| OIG - OIG | Correspondence | 2021-CC-00015 | CIGIE | In Progress |
| OIG - OIG | Correspondence | 2021-CC-00016 | CIGIE | Completed Early |
| RMOS - RMOS | Correspondence | 2021-CC-00017 | OIG | Open |
| OIG - OIG | Correspondence | 2021-CC-00018 | OIG | In Progress |
| OIG - OIG | Correspondence | 2021-CC-00021 | Reg Review | Completed Early |
| OIG - OIG | Correspondence | 2021-CC-00022 | Reg Review | Open |
| OIG - OIG | Correspondence | 2021-CC-00023 | Reg Review | In Progress |
| OIG - OIG | Correspondence | 2021-CC-00024 | Reg Review | Completed Early |
| OIG - OIG | Correspondence | 2021-CC-00025 | Reg Review | Completed Early |
| OIG - OIG | Correspondence | 2021-CC-00026 | Reg Review | Completed Early |
| OIG - OIG | Correspondence | 2021-CC-00027 | Reg Review | In Progress |
| OIG - OIG | Correspondence | 2021-CC-00028 | Reg Review | In Progress |
| OIG - OIG | Correspondence | 2021-CC-00029 | Congressional | In Progress |
| RMOS - RMOS | Correspondence | 2021-CC-00030 | Other | In Progress |
| RMOS - RMOS | Correspondence | 2021-CC-00031 | CIGIE | In Progress |
| OIG - OIG | Correspondence | 2021-CC-00032 | CIGIE | Open |
| OIG - OIG | Correspondence | 2021-CC-00033 | CIGIE | In Progress |
| OIG - OIG | Correspondence | 2021-CC-00034 | Congressional | In Progress |
| OIG - OIG | Correspondence | 2021-CC-00035 | Other | In Progress |
| OIG - OIG | Correspondence | 2021-CC-00036 | Other | In Progress |
| OIG - OIG | Correspondence | 2021-CC-00037 | OIG | In Progress |
| OIG - OIG | Correspondence | 2021-CC-00038 | CIGIE | In Progress |

192.168.5.57/eCase/Reports/ReportsFormat.aspx?PageNo=0&pgrange=SINGLEPAGES&Print=Yes&RptType=CR&RptCriterialD=98&pagesize=100 1/2

Use the options here to configure the printed report output, including the *Destination*, *Pages*, and other *Options*. Click **Save** to print the selected pages.

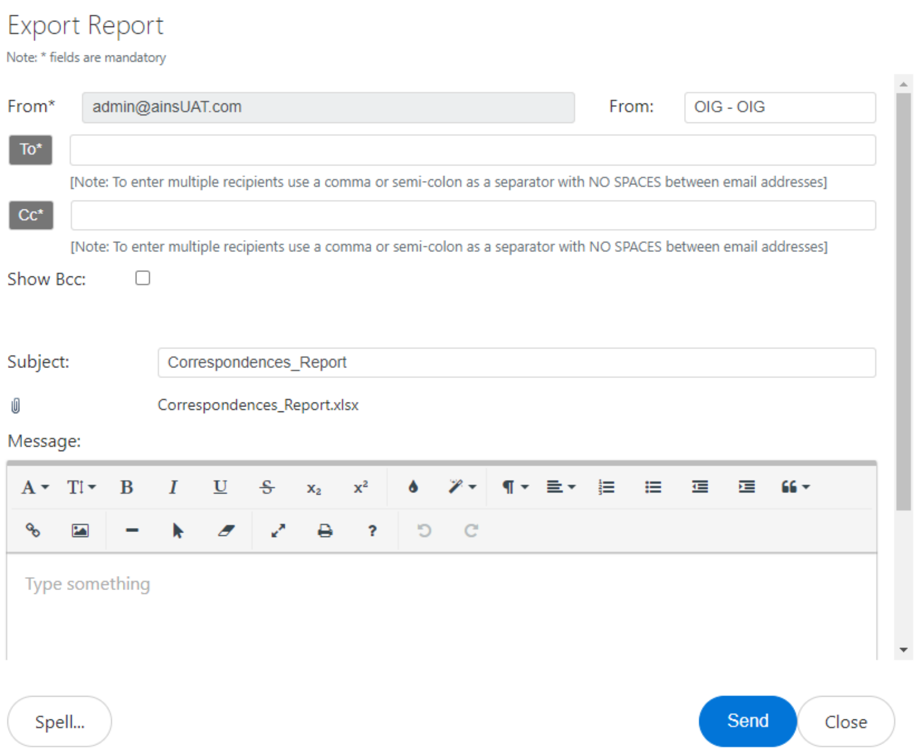
## 5.2.2 Export (Save or Email)

After running a report, there are menu options allowing you to export the results of the report. To export a report, click the **Export** button. The *Export Report* interface appears as shown below:




You have options to select the *Export Report* output type, and determine the *Page Range*. For export, there are options to **Email** the report as an attachment, or **Save** the report to your desktop.

If you select to **Email** the report, the *Email Report* interface appears as shown below:

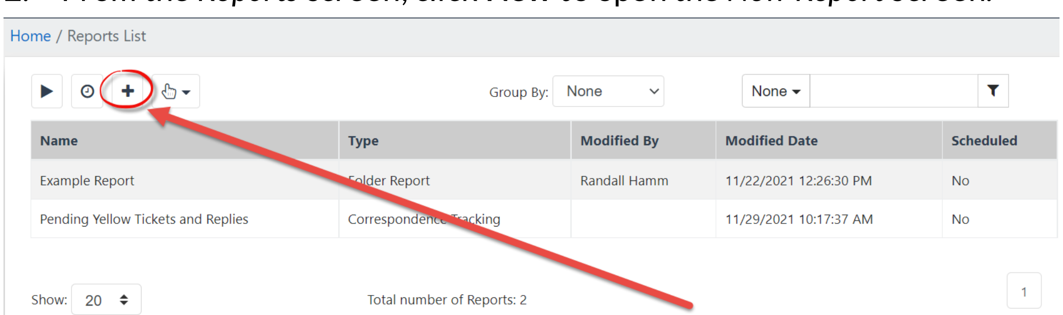



Here you can configure the recipients and message contents, then click **Send** to send the report.

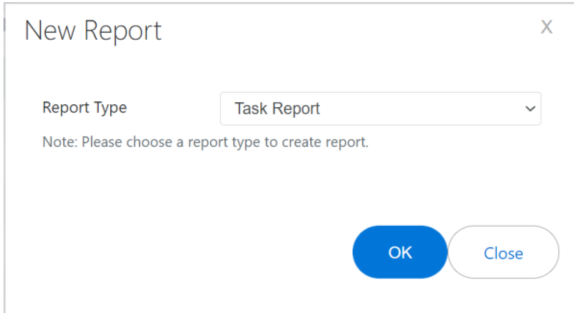
## 5.3 Create a Custom Report

Complete the steps below to create a custom report in eCASE Correspondence Tracking:

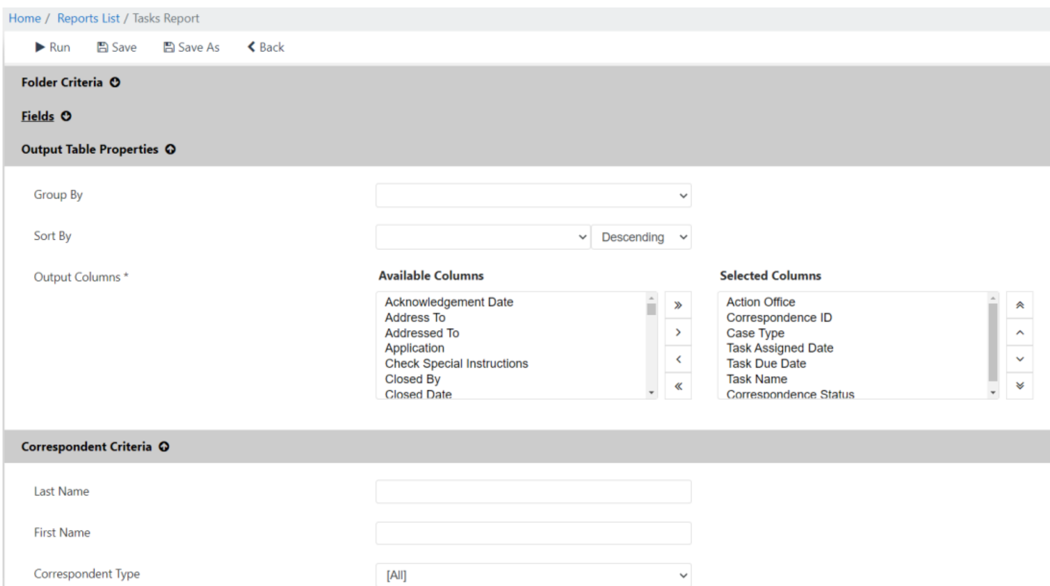
1. Select **Reports** from the *Launch Pad*.
2. From the *Reports* screen, click **New** to open the *New Report* screen.




3. The *New Report* screen appears. Select a type of report to create from the *Report Type* drop-down list, then click **OK**:




4. The screen refreshes and the report criteria screen appears for you to customize this report. The fields available on this screen are specific to your application and the selected Report Type, but may include *Folder Criteria*, *Fields*, *Output Table Properties*, *Date Criteria* or more. Enter the search criteria in the fields provided.




5. Use the *Output Table Properties* section to define the report output. Select entries from the *Available Columns* list and use the **right arrow** to move them to the Selected Columns list. Arrange the *Selected Columns* order by selecting an entry and using the **up and down arrows**. There are options to Group by and Sort By, and you can determine the Output Columns by moving the data you'd like displayed in the report into the Selected Columns field.

**(!!) Note: Required fields are denoted with a * red asterisk. These fields must be completed before the report can be run or saved.**

6. After the report criteria is entered, you can click **Run** to view the report output, **Save As** to save this to your *Reports List* for future use, or **Save** to save changes to an existing report.

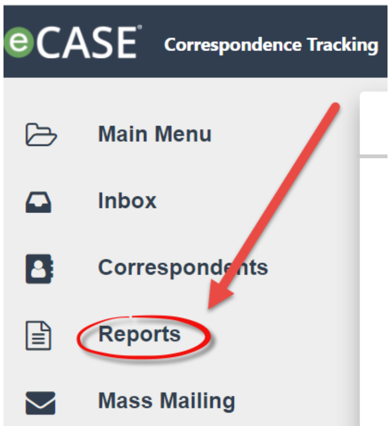
# 5.4 Scheduled Reports

Reports can be run on an ad hoc basis or scheduled to run on predetermined schedules. Consult the subsections below for information about scheduling reports.

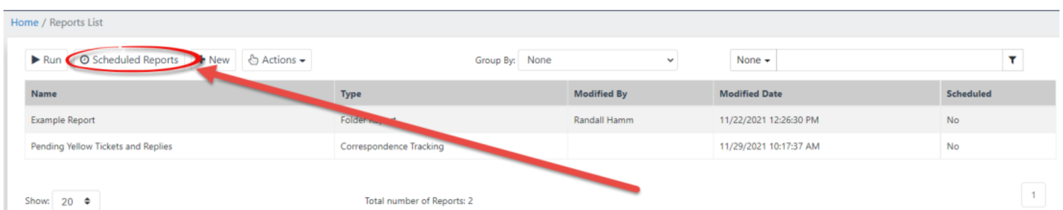
## 5.4.1 Scheduled Reports Interface

To view the Report Scheduling interface:

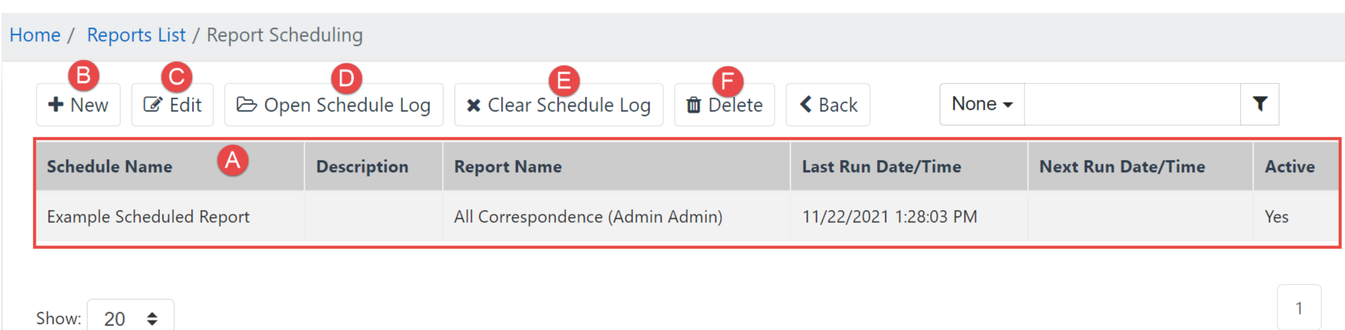
1. Click **Reports** on the *Launch Pad*. The *Reports List* page appears.




2. Click **Scheduled Reports**. The *Report Scheduling* page appears.




The Report Scheduling User Interface is captured below:

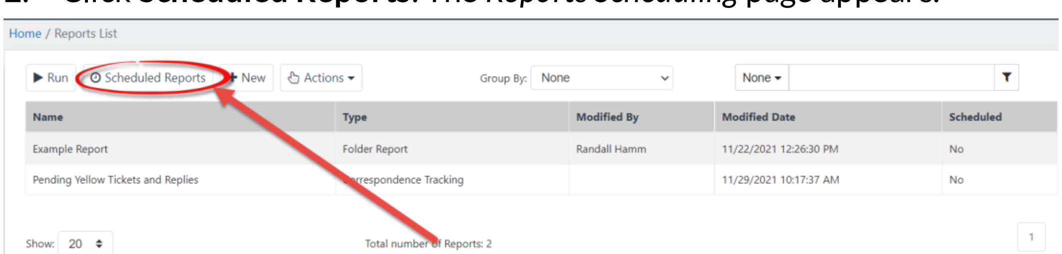


| Ref | Item | Description |
|---|---|---|
| A | Reports List | The workspace displays a list of all reports available to you in this eCASE application. This list includes details, such as the report *Name*, *Description*, and *Last Run Date/Time*, as configured by your administrator. |
| B | New | Click this to create a new Scheduled Report. |
| C | Edit | Select an entry from the Reports List and then click Edit to update the parameters of the scheduled report. |
| D | Open Schedule Log | Select an entry from the Reports List and then click Open Schedule Log to view or edit the report scheduling details. |
| E | Clear Schedule Log | Select an entry from the Reports List and then click Clear Schedule Log to delete the information in the schedule log. |
| F | Delete | Select an entry from the Reports List and then click Delete to permanently delete the scheduled report. |

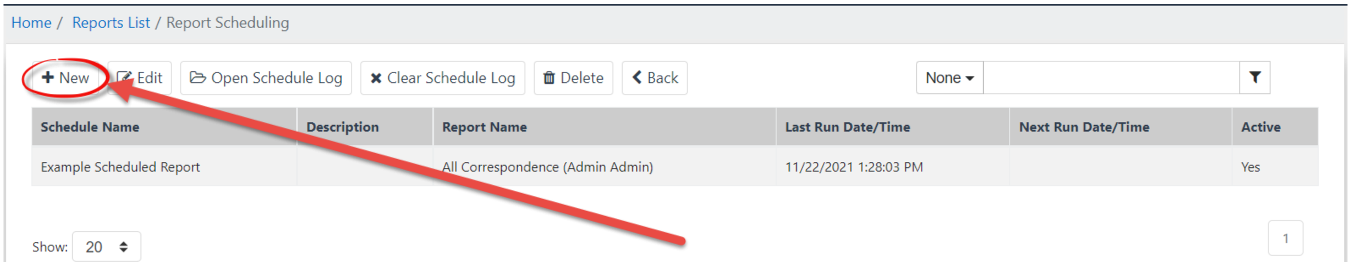
### 5.4.2 Create New Scheduled Report

To create a new Scheduled Report:

1. Log in to the application and click **Reports** on the *Launch Pad*. The *Reports List* page appears.
2. Click **Scheduled Reports**. The *Reports Scheduling* page appears.

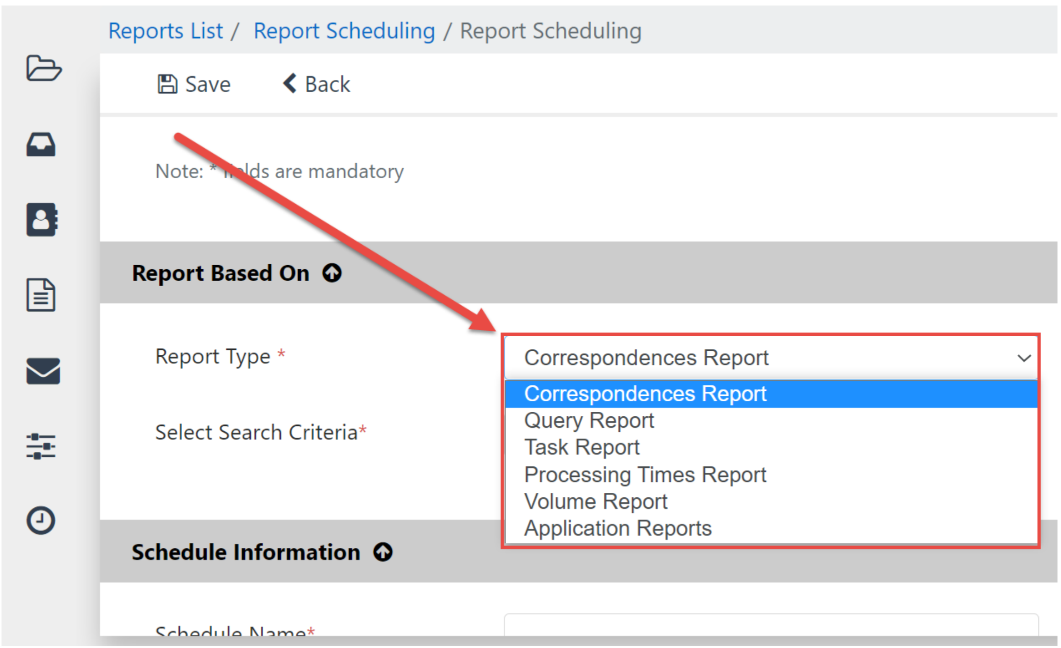



3. Click **New Scheduled Report**. The *Report Scheduling* page appears.



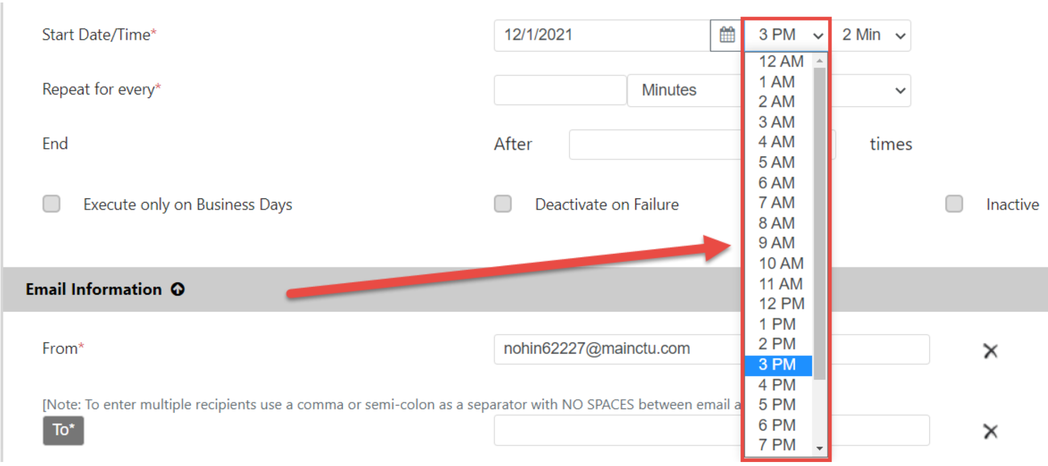

4. Select the **Report Type** from the drop-down list.

**(!!) Note: This selection may change the fields available on the Report Scheduling page.**




5. Select the **Search Criteria** from the drop-down list.
6. Enter the **Schedule Name** in the field.
7. If desired, enter a **description** for the scheduled report in the field.
8. Use the date and time pickers to select the **Start Date/Time**.

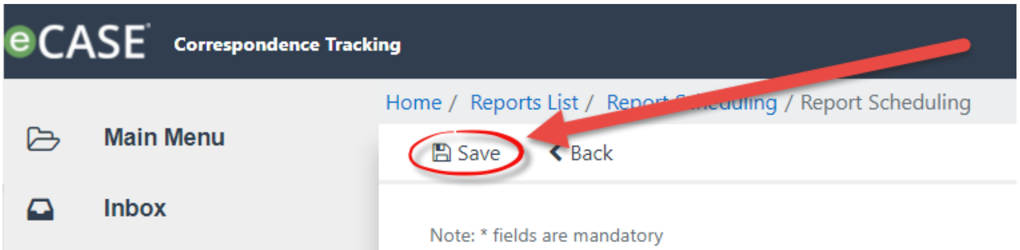
**(!!) Note: This is the date and time that the first scheduled report is run.**




9. Select the repetition interval from the **Repeat for Every** fields. Enter a **value** in the numeric field, and then select the **length of time** from the drop-down list.
10. Optionally, determine when the scheduled report will end by entering the **number of times the report will run** in the *End After* field.
11. You can select the **Execute only on Business Days** checkbox to limit the report to only being run on Business Days.
12. You can select the **Deactivate on Failure** checkbox to deactivate the report if it the job fails to run once.
13. You can select the **Inactive** checkbox to make the scheduled report inactive.
14. In the *Email Information* workspace, enter any *recipients' email addresses* in the *To* and *CC* fields.
15. Enter the **name for the report attachment file** in the *Attachment Name* field.
16. Select the **file format** for the report from the *Format* drop-down list.
17. Enter the **subject** of the email in the field.
18. If desired, click **Insert Fields** and select any preconfigured fields to include with the message.


19. Use the text editor to compose the content of the email message containing the report file.

20. Click **Save**.

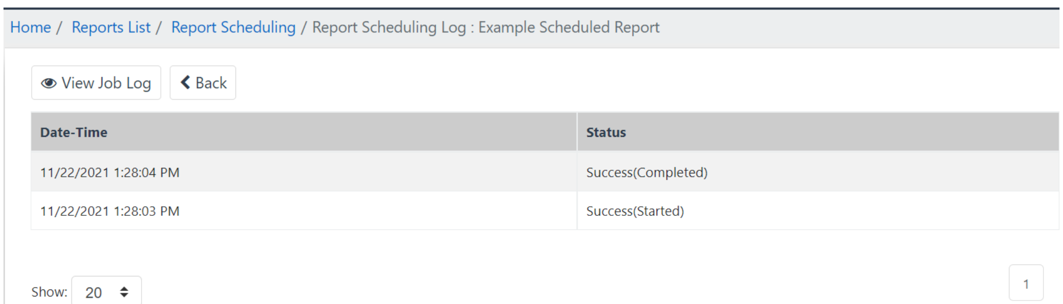



The report is run automatically using the report parameters configured in this procedure.

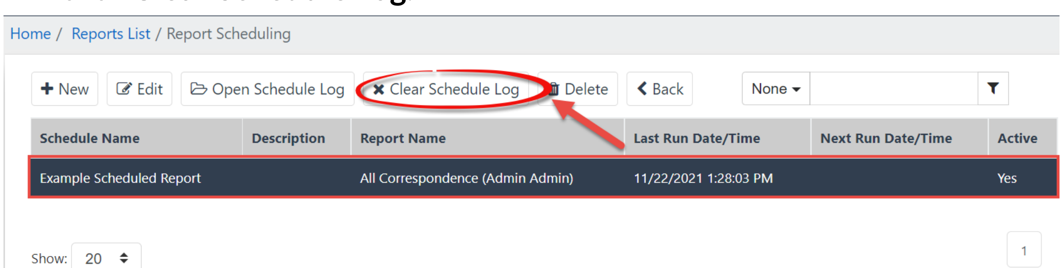
### 5.4.3 View/Clear Schedule Log

If any scheduled jobs have been configured, they are listed in the *Report Scheduling* workspace. To view/clear the scheduled report log:

1. Navigate to the Report Scheduling page and select the report from the workspace and click **Open Schedule Log**. The page refreshes to display any previously initiated jobs.




2. If any scheduled jobs have been configured, they are listed in the *Report Scheduling* workspace. To clear the schedule log, select a scheduled report from the workspace and click **Clear Schedule Log**.



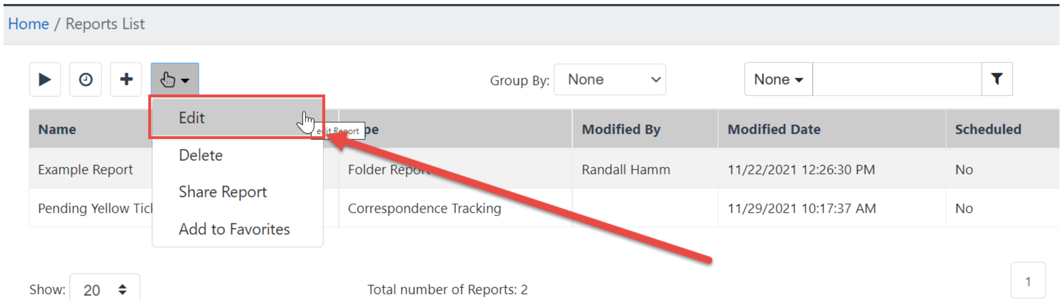

3. A confirmation window appears, asking you if you are sure you want to clear the log. Click **OK** to clear the log.
4. The page refreshes to display the *Reports Scheduling* workspace, and the selected Schedule Log is cleared.

## 5.5 Actions

The following subsections describe some actions you can perform on reports.

### 5.5.1 Edit Report

To edit a report, select a report from the *Reports List* and click **Edit** to open the report for editing.

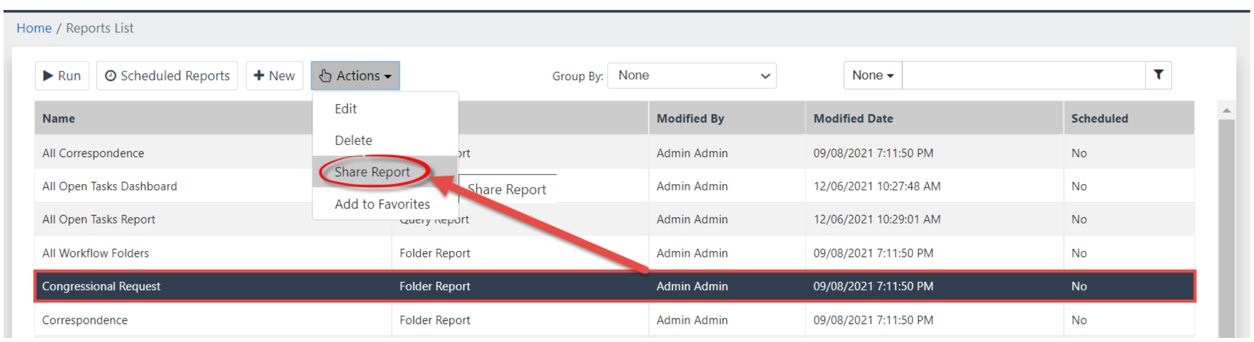



The page refreshes to display the selected report criteria. Be sure to click **Save** to retain any changes made to the report.

### 5.5.2 Share Report Template

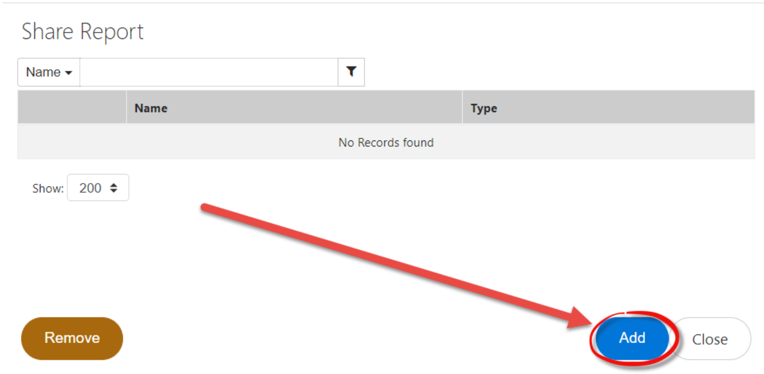
To share a report:

1. Click **Reports** from the *Launch Pad*. The *Reports List* appears.
2. Select a report from the list and select **Share** from the *Actions* drop-down list.

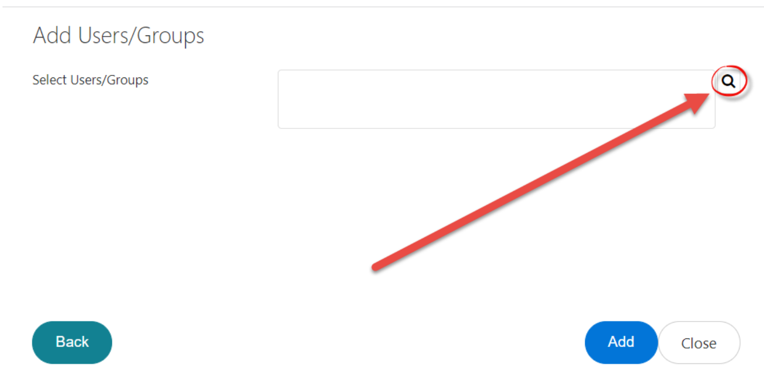



3. The *Share Report Template* window appears. If no users are present in the *Share Report* workspace, click **Add**.

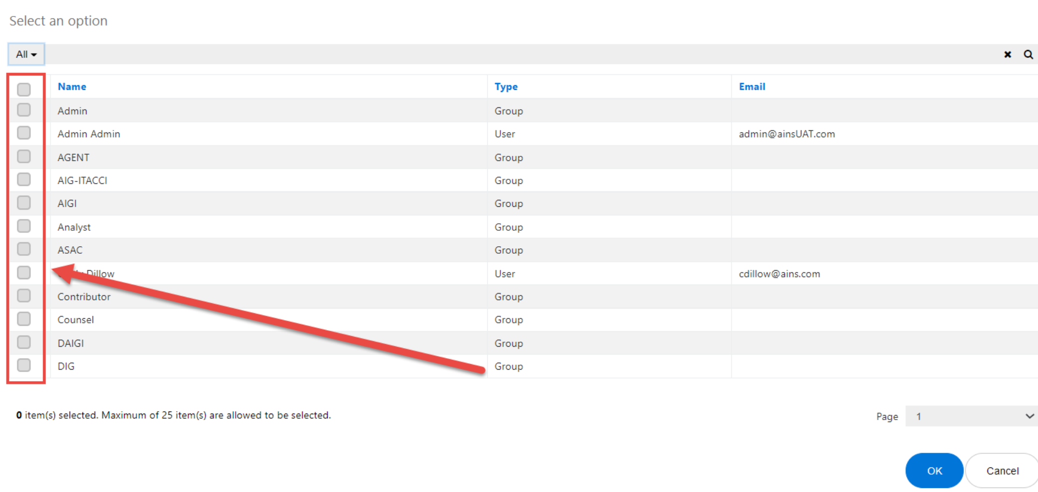
**(!!) Note: If users have already been added to the Share Report workspace, select the user(s) and then click Add.**




4. The window refreshes to display the *Add Users/Groups* workspace. Click the **lookup** tool to select the users/groups to share the report results with.

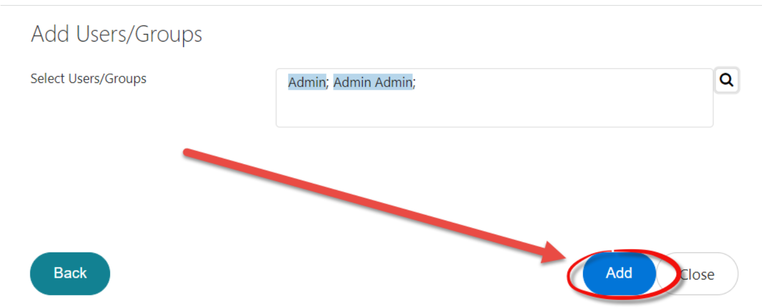



5. The workspace refreshes and displays a list of roles you can select to share the report results. Click the **checkboxes** next to the recipients you'd like to add.




**(!!) Note: You can select multiple recipients.**

6. Click **OK**. The selected Users/Groups appear in the *Select Users/Groups* field. Click **Add**.



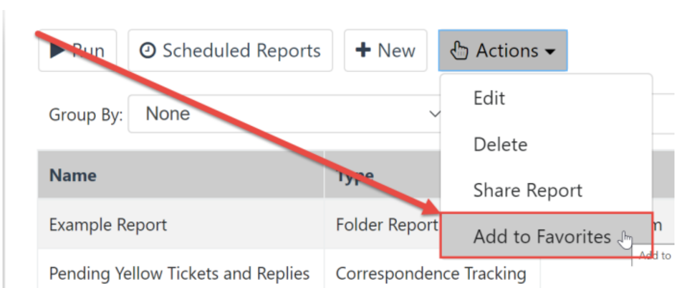

7. The workspace refreshes to display the Share Report window, containing the newly added user/groups. Review the list recipients and use the Add or Remove buttons to add/remove additional recipients.

After adding the users to receive the completed report, you must run the report to create an output and share it with the selected recipients.

### 5.5.3 Add Report to Favorites

To add a report to your Favorites tile on the Home Screen:

1. Click **Reports** on the Launch Pad. The *Reports List* page appears.
2. Select a report from the workspace, and then select **Add to Favorites** from the *Actions* drop-down list.




3. The *Add To Favorites* window appears. Select either **Existing Group** or **New Group** from the Folder drop-down list.

**(!!) Note: Selecting New Group prompts the window to refresh to display a blank field adjacent the Folder drop-down list. Enter the name for this new Group in the field.**

# 6 eCASE Search Capabilities

eCASE offers robust search capabilities. See the subsections below for details on searching eCASE.

## 6.1 Quick Search

The *Quick Search* feature allows you to quickly search and access correspondence files, contacts, or documents.


To perform a Quick Search:

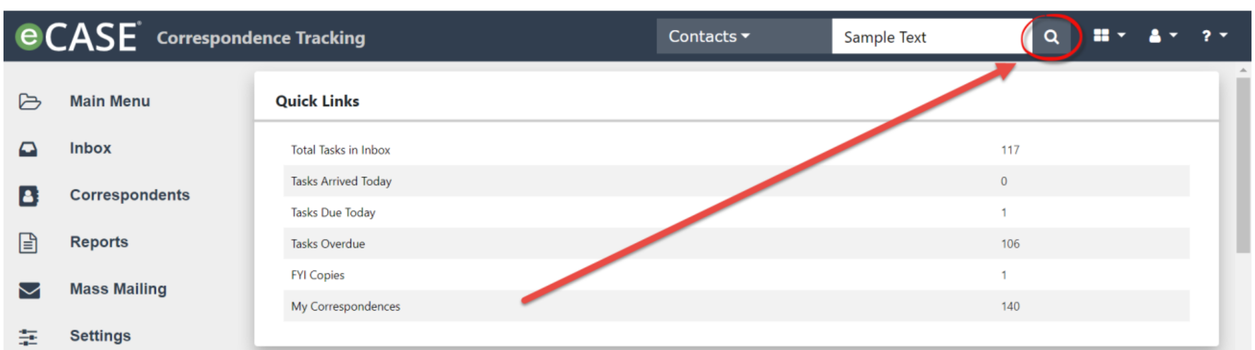
1. Using the *Search* drop-down list (located left of the *Search* text box), select the search scope. For example, to search for a specific correspondence case folder, select **Correspondence** from the drop-down.

**(!!) Note: eCASE Administrators can configure different search scopes using any searchable fields.**

2. Enter the **search criteria** in the *Search* field. For example, when searching for a correspondence, search for criteria such as correspondence ID, solicitation number, etc.

**(!!) Note: You can enter a key word to perform a word search on all searchable fields of the correspondence.**

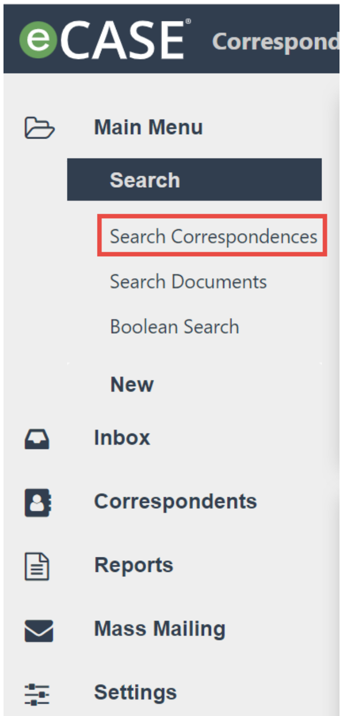
3. Click the Lookup icon, highlighted below. The Search Results screen appears and displays the results of the search.




**(!!) Note: You can use the Quick Search for any search scopes configured by your administrator.**

## 6.2 Search Correspondences

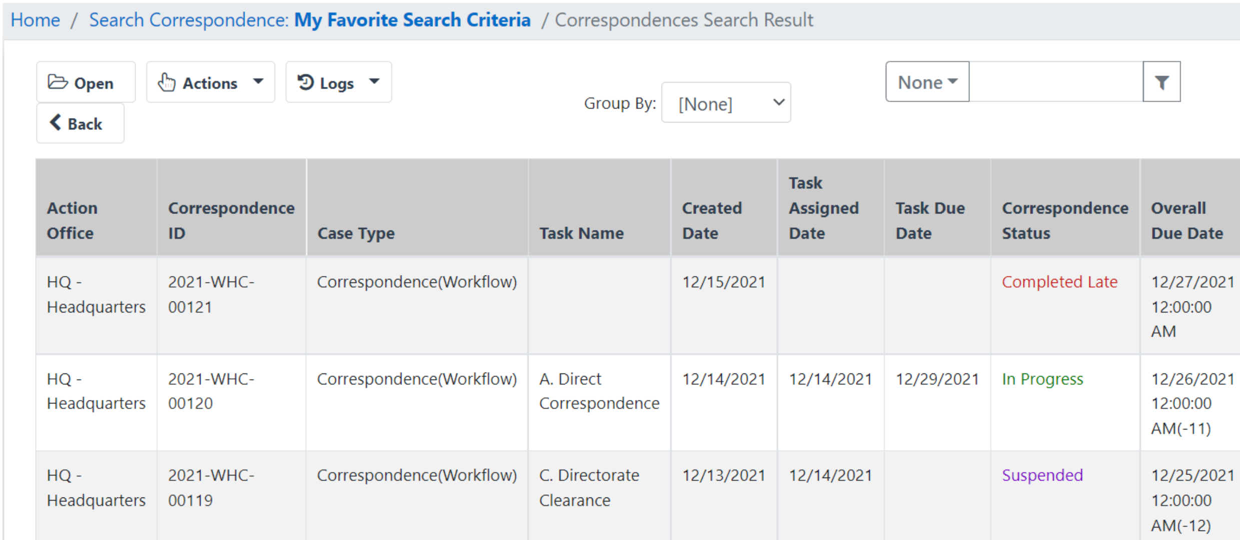
The *Search Correspondences* feature allows you to search for correspondence files using searchable fields available in the application, directly from the *Launch Pad*.




1. Select **Search > Search Correspondences**. The *Search Correspondence* page appears.

**(!!) Note: You can change the columns displayed in search results with the Selected Columns option at the bottom of the Search Correspondences screen.**

2. Select your search criteria using the available fields.
3. Click **Search**. The *Search Results* window appears as shown below:




| Action Office | Correspondence ID | Case Type | Task Name | Created Date | Task Assigned Date | Task Due Date | Correspondence Status | Overall Due Date |
|---|---|---|---|---|---|---|---|---|
| HQ - Headquarters | 2021-WHC-00121 | Correspondence(Workflow) | | 12/15/2021 | | | Completed Late | 12/27/2021 12:00:00 AM |
| HQ - Headquarters | 2021-WHC-00120 | Correspondence(Workflow) | A. Direct Correspondence | 12/14/2021 | 12/14/2021 | 12/29/2021 | In Progress | 12/26/2021 12:00:00 AM(-11) |
| HQ - Headquarters | 2021-WHC-00119 | Correspondence(Workflow) | C. Directorate Clearance | 12/13/2021 | 12/14/2021 | | Suspended | 12/25/2021 12:00:00 AM(-12) |

## 6.3 Full Text Search

This feature allows you to search for documents in a correspondence file using text.

1. Select **Search > Search Correspondence**.
2. In the *All of these words* field, enter any word related to the case:

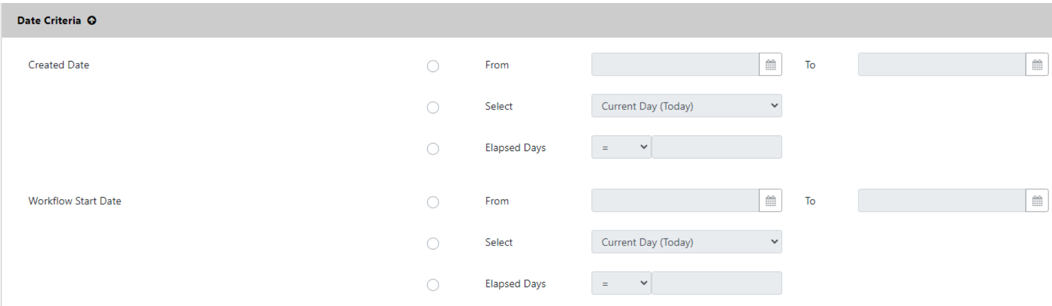

3. Click **Search.**

**(!!) Note: You can also use the other options presented to conduct a search. Options include: The exact phrase, Any of these words, None of these words, and Correspondence ID.**

## 6.4 Date Criteria Search

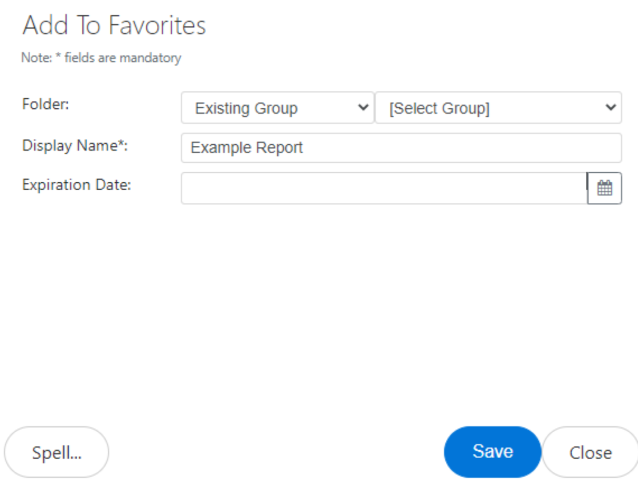
This feature allows you to search correspondence using a specific date or date range.

1. Select **Search > Search Correspondence**.
2. In the *Created Date* section, click the **calendar** icon next to the *From Date* radio button and select a date.




3. In the *To Date* section, click on the **calendar** icon and select a date.
4. Click **Search.**

**(!!) Note: You can also use the other options presented to complete a search, including Created Date, Workflow Start Date, Received Date, Closed Date, Priority Code, Response Due Date, and Secondary Due Date.**




5. Select a Group from the drop-down list or use the free text field to enter a name for the new folder.
6. Select an **Expiration Date** using the date picker.
7. Click **Save.** The window closes, and the report is added to the designated group.