



WORKPRO FOI & SAR CASE MANAGEMENT SOFTWARE

# The smart way to **log, track** **and report** FOI and SAR casework

Respond swiftly and securely to every request - with a trusted system that simplifies your process and meets data regulations.



# Track every case. Identify themes and trends. Protect data at every step.

Workpro is cloud based software, hosted in secure UK based data centres. It is easy to use, cost-effective and specifically developed to meet the demands of FOI, EIR and SAR casework.

As standard, Workpro brings a consistently high level of quality to every aspect of your team's work, thanks to built-in workflows, templates and reporting. It also gives you comprehensive document handling, detailed task management and a powerful search tool.

Take control of your information requests and data protection cases, with GDPR compliance built-in. And if you need further customisation to fit your organisation's needs, just ask.



## Consistency

- **Everything in one place** improves case coordination and eliminates duplication.
- **Built-in workflow steps** ensure consistency and fairness in request response.
- **Templates reduce errors**, save time, and ensure professional correspondence.
- **One source of the truth**, enables colleagues to quickly pick up cases and queries.
- **Reliable data collection** and meaningful categorisation feeds accurate reporting.

## Control

- **Case status and team performance** can be monitored in real-time against targets.
- **Clear visibility of who needs to do what**, with alerts and reminders to prompt action.
- **Dashboards highlight issues** so that remedial action can be taken.
- **Cases can be easily re-assigned** due to staff absence, for example.
- **Identify common request themes** for FAQ publication and improvement initiatives.

## Compliance

- **Clear workflow guides staff**, so legislation and policies are always correctly followed.
- **Notifications and alerts** ensure vital information and deadlines are not missed.
- **File management tools** ensure compliance with data protection and data access laws.
- **Chronological audit trail** guarantees full accountability and transparency.
- **Management reports** are easily generated from the built-in standard reports library.

# The solution:

## Workpro Requests for FOI & SAR case management - features

“The team members are absolutely delighted with Workpro. It is intuitive and user friendly and you can easily work through the steps.”

Stephanie Dunn, TSB Bank

### Log & track all casework



#### Case Capture

Quickly record all case details, however they come in (email, letter, web, phone, text and social media).



#### Configurable Case Types

Out-of-the-box GDPR compliant workflows, configurable to your policies. Includes FOI, EIR, SAR, DP case types.



#### Document Management

Store all documentation in the case record and easily bundle for sharing. Optional PDF editing and redaction.

### Management information



#### Reporting & Analysis

Built-in standard reports library and flexible report writing tools. Well categorised data ensures accurate, meaningful reporting.



#### Performance Monitoring

Track casework using comprehensive dashboards, case and task views, with any issues highlighted.



#### Quick and Advanced Search

Everything is searchable, down to document level, with flexible filtering. Linked Case or Precedent Case tags.

### Respond & resolve



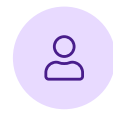
#### Alerts & Reminders

Highly visible alerts, reminders and tasks drive action, while any vulnerabilities or risks are flagged.



#### Auto-populated Templates

Email and letter templates are auto-populated with case data, with seamless MS Word integration.



#### Case & Task Ownership

Allocate and reassign case owners for full accountability. Tasks can be manually or system-generated.

### Security & maintenance



#### Access & Audit

Authorised access only, with case-level restrictions. Full audit trail. Data encryption. Single sign-on option. UK based, ISO 27001 data centres.



#### User Admin Tools

Key system elements are maintainable by authorised administrators. e.g. lookup lists, fields, user permissions.



#### Data Protection

Integral file management utility lets you manage data and records according to data protection policies.



# Complete control of your information requests. It all begins here

Find out more about [Workpro FOI & SAR Case Management Software](#)  
Or email us on for a free demo at [workpro@casltd.com](mailto:workpro@casltd.com)



Workpro case management system is developed by  
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