User Name	*Tanja N.S*	*Sam B.*	*John(joe) B.*	*Steven S.*	*Denise F.*	*Jack W.*	*Robby*	*Samuel G.*	*Danielle T.*	*Emily K.*	*Daniel Lam*
User Role	***Client Service Officer***	***Head of Client Services EMEA (new role)***	***Transactional Support Team***	***Client Services - Treasury Team***	***Client Service Officer***	***Client Facing team - treasury Services***	***?***	***Treasury Services - Managerial perspective***	***Manages the Global Investigations for the USD***	***Manager for EMEA investigations team***	***Service Team - Local Clients***
User Duties		does a lot of reporting	responds back and forth between clients	manage client queries	Portfolio of high sensitive clients	answer inquiries	utilize as case management system to respond back to clients, open assist cases, etc.	looks for case age right away	uses ECRM to facilitate answering any questions that arise for any of her teams	answer inquiries from internal departments	phone & email inquiries
	Slow System	Request for visuals/dashboards for assist/regular/and closed cases (all kinds)	Move the "View more" button to the top of the email section	wants the ability to see multuple email chains at ones for comparison purposes	Has an issue with chrome vs.firefox	When copying & pasting into eCRM it messes up the format	Was told to use firefox while using ECRM, but has had most success in google chrome.	Filter reset	responding to a case has too many steps	Unable to prioritize cases within a queue. Wants to highlight urgent cases	When sending emails through eCRM, there is no spellcheck
	Too Clicky	Filtering difficult to use, would like to be more customizeable?	Likes to see full email title in the table view	Doesn't really use templates-- manually writes responses to each client since they're all different	Assign to me button doesn't work when clicked	Can't attach anything to a case	Dot ellipses in emails do not consistently work-- happens every time a relationship manager is attached?	Needs to see more email informaion; who its from; internal vs. external	when origin case is resolved, assist still remains open. Assist should close with origin	Resolving cases take too long; too many steps	Creating assits take too long
	"Assign to me" Button didnt work*	Request for integration with Merlin/Swift. Should be auto-updating in both locations	Filtering refresh when going back and forth	would like ability to pop out and move tabs to see multiple things at once	Attachment issue; cant attatch documents to assist cases	general slowness	auto-save causes work to be lost while using emails	Scrolling for emails is tedious	creating an assist case is time consuming	Filtering is sometimes inneficient; custom filters?	Assign to self takes a while to load
	Too many extra steps to assign case to herself	Notifications; too many. Need to turn on and off for specific queues	Templates are helpful but they are annoying to use	can't use assign to me button when a case is assigned to someone else	In the assist case details, there is no information, it's just a link to the case. Users want to see the info	Task of resolving/assisting cases is slow/takes too long	doesn't make sense to click the box at the top of the templates page to see his templates	In the details view of the tab, for the ones you have to hover over, they want to be able to pin that at the top. or customize which tabs they want (this is in the case details not the top tabs)	too many clicks	Assign to me button doesnt work when it's assigned to someone else first	Unable to search by account number
	Request for automated system to identify client within an email and populate Client entity in case information	Ability to export information; case history or from any other tab	Templates that are used often should be recognized and suggested	no way to re-attach information from a previous email to show that information was already sent-- have to take a screenshot instead	cant copy and paste a distribution list (12/15 emails at a time)	High volume of inquries - wants an automated confirmation email sent to acknowledge the inquiry	would be useful to have an unmerge case option if a case is accidentally merged to the wrong client	too clicky	too laggy		Wants the functionality of outook to be replicated in eCRM
		Should be able to tell the difference between internal & external emails in the email square	unable to move a tab into it's own window for comparison purposes - needs to see things in more than one window	after clicking into a specific case on the grid and then closing it, would be nice if the grid stayed in the same place as opposed to bringing him all the way to the top again	errors when trying to apply templates; some entitielment error pops up	Too many queues - too many notifications, wants to customize notifications if possible	too many notifications	Diagrams should be link to the cases - there seems to be a data issue	"hates" notifications. Has no idea what they mean and receives too many because she has access to so many queus. Not very helpful		Cases get reopened when after it gets closed from the system because of emails being exchanged
		Wants to apply template in the Classification square		would like for all related cases (continuations and their assist cases) to be listed together	wants to see who the email is going to; and all just general information.	Wants to be able to pdf an email / export	unable to attach files to assist cases	Case history is difficult to understand - when a case is canceled, information still gets updated to it - this shouldn't happen	view more/view less button on emails doesn't always work, so she needs to open them in a separate window to view the whole email chain		
					Cant copy and paste the attatchment from the origin case to the assist case; it should automatically come over	Global search is unable to find cases & if you search subject line it won't work either		Some emails are being shown without the employee's knowledge.	still has to use outlook for certain things because of shared drive		
					Templates sometimes don't fill in the information correctly	In the assist case details, there is no information, it's just a link to the case. Users want to see the info; all connections		Quick filters/column filters. ability to filter any column	searching for a specific sender of an email is not easy, also can't always search for specific cases		
						The automation that is already in place sometimes duplicates cases / reopens cases if emails are regarding the same case		Customizable alerts			
						If someone gets removed from a case, they should be removed from the distribution list; they dont right now					
						Manually enters information because it ends up being faster than using templates					
						Generic account					
						Wants classification to be automatically filled out baed on the email					
						integreation with Swift/CIA/Merlin					

Elen Dejefri	***Thanigaivel***	***Tamara Urban***							
Client Services for managing the Indonesian(?) market	***Operations manager. 2 months into the role. USD investigations team and MTI Ameriaxs***	***Manager of TS Investigations team?***							
utiliziing ECRM on a day to day basis	manage external inquiries coming through email, looks at what the status is of any aging items on ECRM	receive emails as cases into ECRM, directly client facing assisting them							
LATENCY*** he really likes this word	if someone is added to a case, a new case is created. This should not happen-- if someone forwards the email or changes the subject line, it will create a new case	when # of unassigned cases exceeds 250, that maxes out the # of cases that can be shown on a page, and when filtering is applied, it's only applied to the first page, and not whatever cases are on the second page.							
after populating the necessary fields, still need to wait a few seconds before able to resolve case	clients have not been onboarded to ECRM?	Ellipses at end of email to expand don't work-- only works when flipping to a different tab and then back again							
doesn't use templates because he prefers to have his own control over filling things out	if they incorrectly send an email, there are no options to recall	Would like to be able to filter grid by specific people-- right now can only filter alphabetically and by cases that are assigned/unassigned to you							
would like notifications to update on if a case is resolved and by who	uses template to connect with internal departments	Cannot attach a file when creating an assist case							
when trying to highlight and copy case information, it force opens the tab for the case instead of letting you copy	has to look up keyword for a case in a different system-- and then after the keyword is assigned, the team needs to manually assign the case to themselves	would like bulk mark as risky option							
search results are too "messy"	possibility that an email may be sent to the wrong person-- autosearch on names should be disabled?	filtering is gone after going into a case and then coming back to grid							
sometimes screenshots work, sometimes they don't-- has to download screenshot to see it	View cases for respective team members	classification is pulling incorrect information (machine learning not great)							
would like more formatting options for emails (example: html for mainframe). In chrome, it becomes an image, but in Firefox it pastes the text...but not formatted correctly		selecting one signature in an email does not swap out the other one							
		cancelled/resolved cases listed in grid are not always the queus she has access to too-- has to filter by cases relevant to her team							