



# Simplify and Accelerate Client Repapering

## opal:Repaper

### Client Repapering Solution

Opal Repaper is a complete solution that enables financial services customers to manage the process of repapering their clients in response to regulatory changes such as QFC and uncleared margin.

It replaces ad-hoc tools and spreadsheets with a robust cloud-based application which manages the end-to-end negotiation process, from the creation of document templates through bulk emailing of client documentation, to the execution of agreed documents, while also providing management with the real-time insight needed to execute complex repapering exercises.

Taking advantage of the powerful capabilities of the Opal platform, Opal Repaper is built for automation at scale. Like the Opal platform, it is a cloud- or locally-hosted application built using lightweight, modern web technology, managing standard Microsoft Office-format documents.

### Key Benefits

- Track progress on a unified dashboard showing state of outreach by client type, region, and outreach step
- Simplify document production by using custom templates to automate at scale
- Integrate into existing enterprise architecture and workflow with a fully-featured API
- Extract content and report from a single document repository containing a structured view of document data
- Import and export data using standard Excel files

### Dashboard View of Outreach Progress

#### REPAPER SUMMARY STATUS

Template Family: QFC Bi-Lateral

Region: All

Client Tier: All

Tier	Platinum			Gold			Silver			TOTAL			TOTAL		
	Region	NAM	EMEA	APAC	NAM	EMEA	APAC	NAM	EMEA	APAC	NAM	EMEA			APAC
Not Started		179	98	25	268	146	51	670	365	102	1,117	609	178	1,904	8%
Pre-Send QA		69	38	10	104	57	21	260	143	42	433	238	73	744	3%
Sent to Client		251	137	35	377	206	71	943	515	142	1,571	858	248	2,677	11%
Received Back		458	250	64	686	374	129	1,715	935	258	2,859	1,559	451	4,869	20%
Terms Agreed		867	473	121	1,300	709	243	3,250	1,773	486	5,417	2,955	850	9,222	37%
Executed		492	269	69	739	403	139	1,848	1,008	278	3,079	1,680	486	5,245	21%
<b>TOTAL</b>		<b>2,316</b>	<b>1,265</b>	<b>324</b>	<b>3,474</b>	<b>1,895</b>	<b>654</b>	<b>8,686</b>	<b>4,739</b>	<b>1,308</b>	<b>14,476</b>	<b>7,899</b>	<b>2,286</b>	<b>24,661</b>	

## Repaper Highlights

- Configurable dashboard allows the complete repapering exercise to be managed from one view, with one-click drill-down to investigate bottlenecks in the process
- Template editing in Microsoft Word – nothing to download or install
- Bulk generation of documents from Excel or via API
- Automated document distribution to clients, with client-specific email forms
- Customizable workflow - tailor the end-to-end process to your needs
- Import and export all data to and from Excel, or via a simple API

## Repapering Workflow

- Prepare updated contracts in Template Families (e.g. Brexit, QFC) using Opal's Template Author – a Word add-in
- Add rich Content Controls to represent form fields for client-specific data
- Prepare contract data via Excel or the Opal API
- Generate contracts in bulk using the Document Generator
- Share documents with clients for review, negotiation, and execution
- View details on a single dashboard that shows details on number of documents that have been sent out to clients and their current state allowing for full oversight by management

