



## Using RecFind 6 as a Customer Request Management System

*Maintaining all data in the one system*

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## Introduction

Customer Request Management is a generic term usually used to describe the processes followed by local government organizations to manage requests coming from their ratepayers. These requests can apply to anything under the management of the local authority and will come from both individuals and organizations.

Requests could be complaints or a request for services or reporting incidents (broken water pipe) or asking for information on the status of a building approval.

The request can come in as a phone call, an email, a letter or from the public service area when the ratepayer comes in and lodges the request in person.

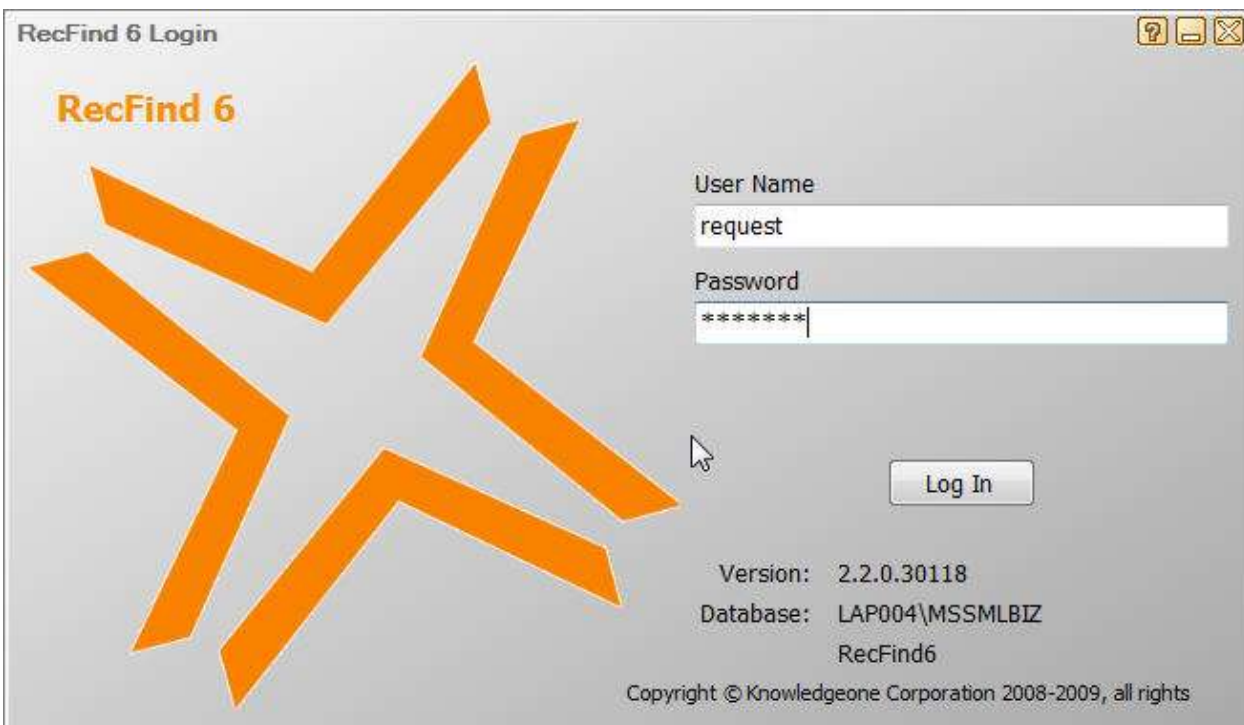
## How?

There are several ways to do this in RecFind 6 but the most appropriate, easiest and fastest way is to use the existing Incident table and processes. This provides around 80% or more of the functionality you will require and configuring it to achieve the following system should take not more than two man days.

The step by step configuration required (using the DRM) is listed at the end of this paper.

## Example

We have set up a new security code and new security group so when request management staff sign on all they see are the data and processes they require to do their job. This is what the RecFind 6 toolbar looks like after a request staffer signs on:



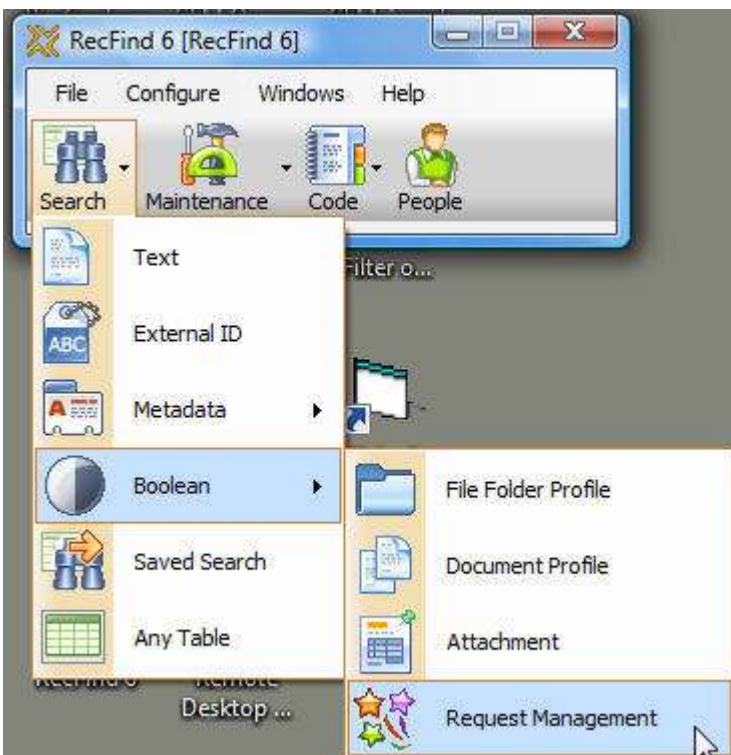


We have also used the DRM to add this new application to the toolbar. See below:

### **To the Metadata Search**



### **To the BOOLEAN Search**



## To the Maintenance Function



We have also chosen to give the Request staff access to file folders, document profiles and attachments (electronic documents), see above and both organization (Entity) and person records so they can maintain details of all types of documents as well as both types of ratepayers, see below:

## Organizations



## People



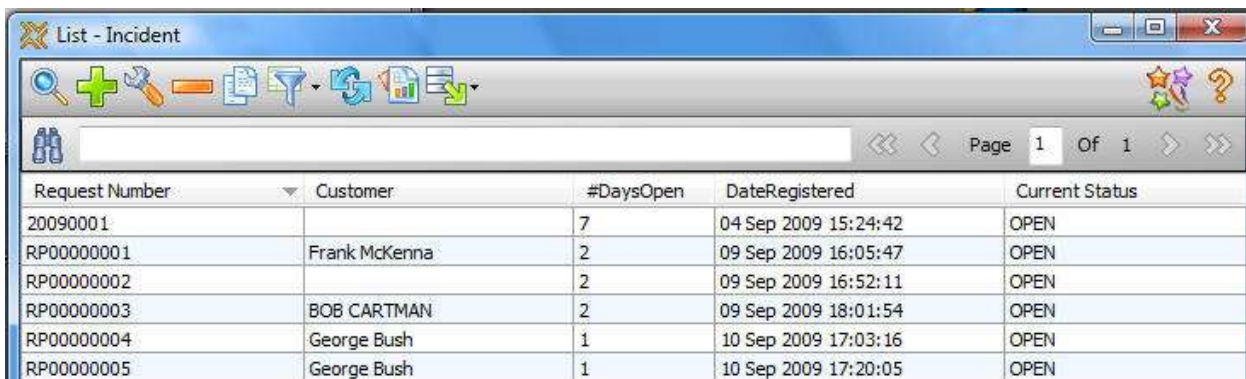
## Operation

We begin with the registration of any request.

The operator selects Maintenance then Request Management (he could also begin in search because we have added the necessary 'methods' to that function also for convenience, saving the operator from having to get out and then get in to another screen).



This is the screen he then sees and the screen he will probably stay in most of the working day.



Request Number	Customer	#DaysOpen	DateRegistered	Current Status
20090001		7	04 Sep 2009 15:24:42	OPEN
RP00000001	Frank McKenna	2	09 Sep 2009 16:05:47	OPEN
RP00000002		2	09 Sep 2009 16:52:11	OPEN
RP00000003	BOB CARTMAN	2	09 Sep 2009 18:01:54	OPEN
RP00000004	George Bush	1	10 Sep 2009 17:03:16	OPEN
RP00000005	George Bush	1	10 Sep 2009 17:20:05	OPEN

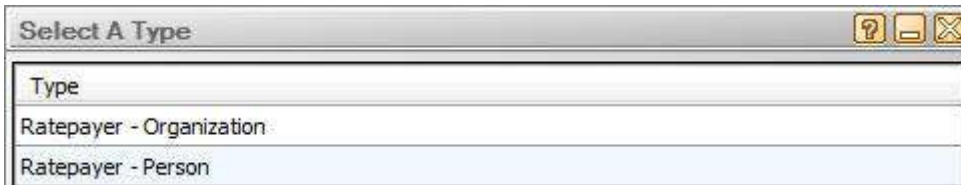
As with any RecFind 6 application the Methods (e.g., Add, Modify, Delete, etc) you display across the top and the columns and headings you display are 100% configurable using the DRM.

In our example I have given the request staffer View, Add, Modify, Delete, Clone, Search, Sort, Print and Export. You may decide, for example, to only give Delete to the manager and not to the request staff.

I have chosen to display the Request Number (which I am automatically generating), the ratepayer (customer) name, the number of days open (automatically generated), the date it was first registered and the current status. You may choose to display different columns to better suit your needs.

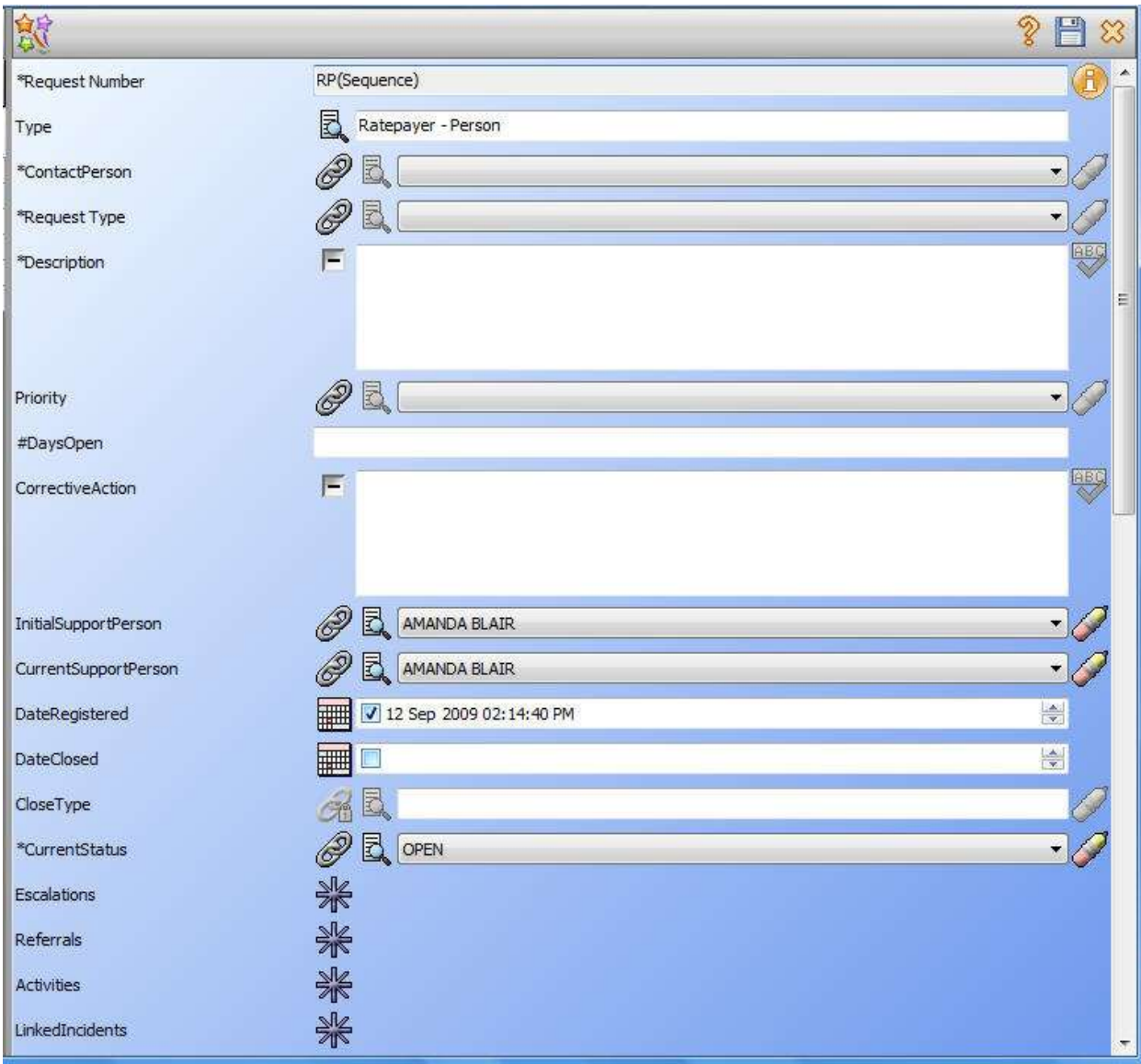
To add a new request click the add button 

I have configured two types of requests, those from normal ratepayers and those from organizations – you may not wish to differentiate and just have one type. This means my first screen asks what type of request I am about to add.

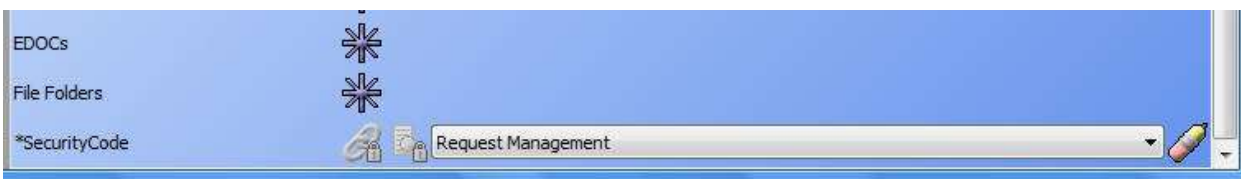


I select Person and click OK.

Then I see the add details of a new request screen.



Next page (the page length depends upon the screen you are using) is:



The fields and captions and order of fields and mandatory nature of fields (i.e., must be completed) are all configurable using the DRM.

Some fields I have configured to be automatically populated such as Request Number, InitialSupportPerson, CurrentSupportPerson, DateRegistered and CurrentStatus.

Any field beginning with an asterisk (\*) is mandatory. The record cannot be stored until this field has been completed and has a value.

Some fields like Request# and #DaysOpen are automatically calculated and populated by RecFind 6 and cannot be overridden by the operator. Again, this is all configurable using the DRM.

The order of the fields on the screen is also configurable, you should adjust this to suit the way your operators work and ask questions.

There is logic (business processes) behind many of the fields. For example, RecFind 6 will automatically calculate the number of days a request is 'open' (i.e., not closed). There is also more 'automatic' logic involved if you choose to use the Escalations, Referrals and Activities links because code to support these functions is a standard part of RecFind 6

Let's now look at a completed Request and see the options and logic I have built into this application using the DRM.

The screenshot displays a request management interface with the following fields and values:

- \*Request Number: RP00000006
- Type: Ratepayer - Person
- \*ContactPerson: George Bush
- \*Request Type: Animal
- \*Description: There is a kangaroo in my yard and it is attacking my dog. Can you please send animal control ASAP?
- Priority: Urgent - Immediate action required
- #DaysOpen: 0
- CorrectiveAction: Refer this to animal control and ask for an immediate response
- InitialSupportPerson: AMANDA BLAIR
- CurrentSupportPerson: Frank McKenna
- DateRegistered: 12 Sep 2009 02:14:40 PM
- DateClosed: (empty)
- CloseType: (empty)
- \*CurrentStatus: OPEN
- Escalations: (empty)
- Referrals: 1 related record(s)
 

ExternalID	RelatedIncident	DateofReferral	ReferredTo
REFERRAL00000002	RP00000006	12 Sep 2009 14:20:57	Joe Bloggs
- Activities: (empty)
- LinkedIncidents: (empty)

The request was registered, a unique request number was automatically generated (and presumably given to the ratepayer as his reference) and immediate action was taken by referring this incident to the animal control person Joe Bloggs.

Alternatively, we could also have created one or more related activities (e.g., scheduled phone calls or meetings). We could have added an automatic escalation if it wasn't closed by a particular date (emailing and notifying the responsible manager) and we could have linked this incident to other 'similar' or 'related' incidents.

## How do we know when something is overdue?

We could use the automatic email functions (e.g., as part of an escalation process) for an 'active' notification or we could do a search or run a report as 'passive' notifications.

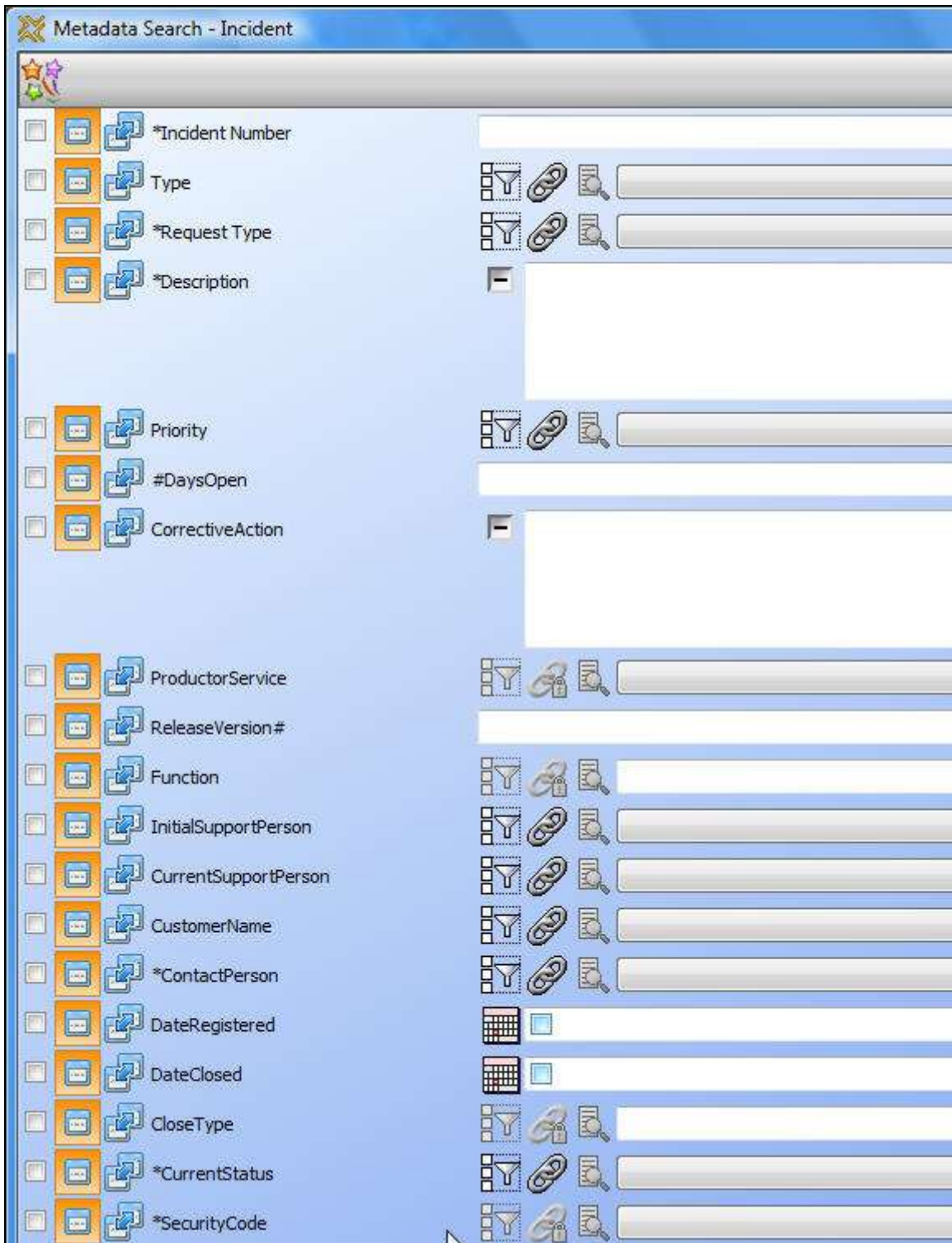
## How do we search?


RecFind 6 automatically fully indexes all Metadata (fields) and the full text of any electronic documents so finding things is really easy. For example:

Select search then select Metadata then Request Management as shown below.

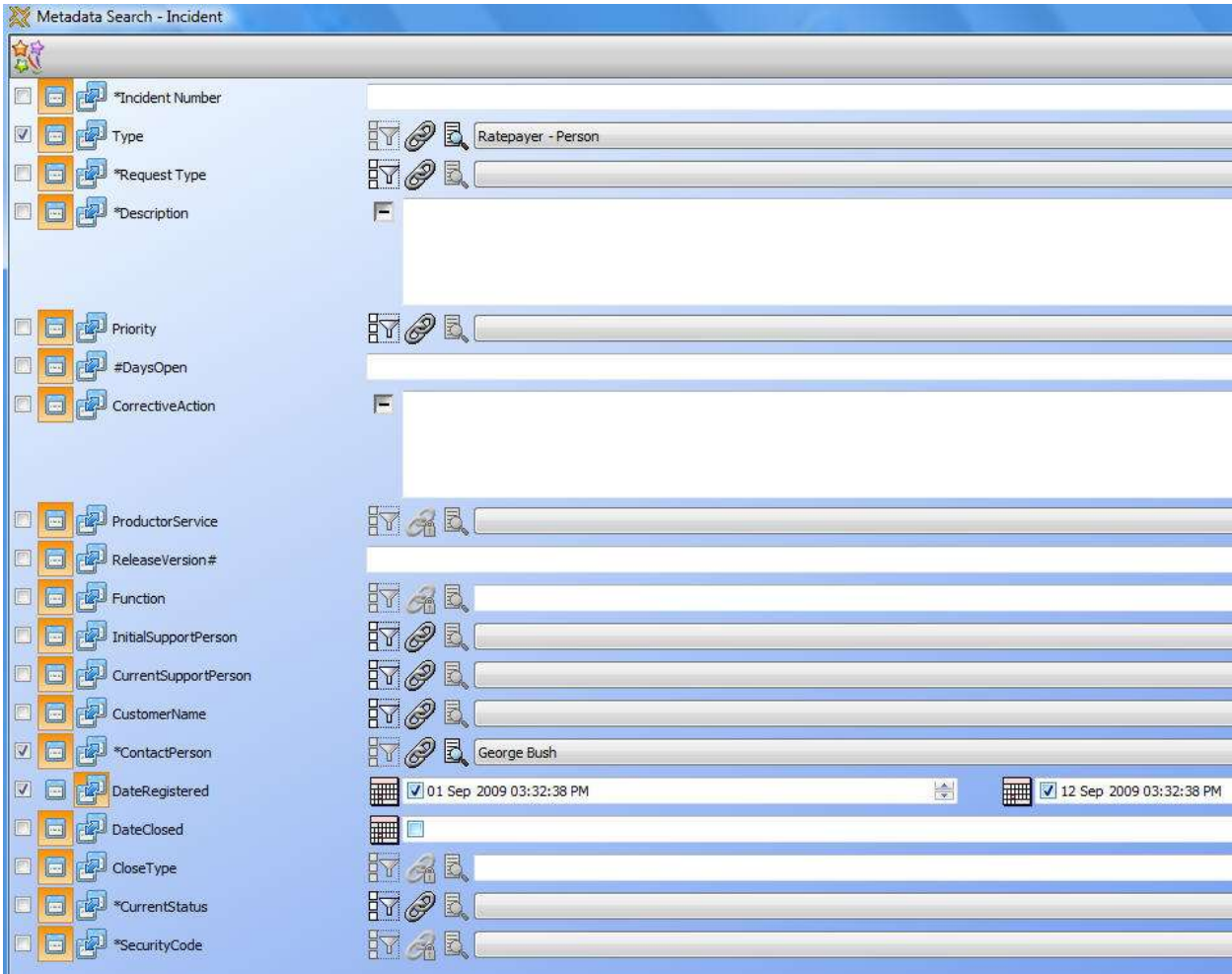


You will then see the following screen:



Note that you can use these icons  to change a single value search to a range search. In the next example I will use this feature to search on a range of dates.

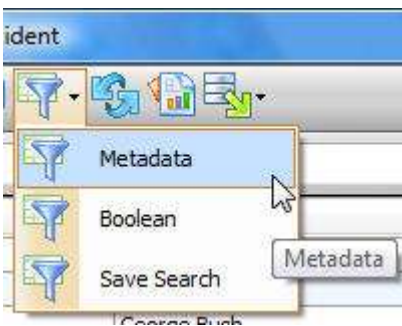
This is my search screen.




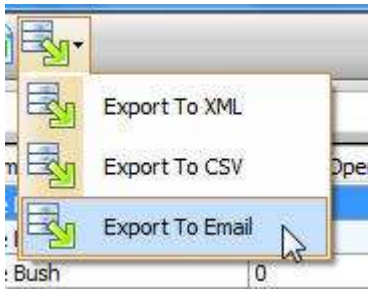
And this is my results screen:


Request Number	Customer	#DaysOpen	DateRegistered	Current Status
RP00000004	George Bush	1	10 Sep 2009 17:03:16	OPEN
RP00000005	George Bush	1	10 Sep 2009 17:20:05	OPEN
RP00000006	George Bush	0	12 Sep 2009 14:14:40	OPEN

At this point I can view any record, modify any record (you should think about which users should have Modify and Delete). I can also search again within this result set, see next screen:




I could sort the data into a different order using the Sort Method  or I could export one or more or all records in one of three formats, see below:



And finally, I could produce a report,  see next heading.

## How do we report?

We click the report Method  and we are presented with the standard report selection (RecFind 6 includes a powerful, fully featured report writer as well as standard reports).

We can create (and then save for re-use) a brand new report, we can modify (and save for re-use) an existing report or we can just use one of the standard or already saved reports.



## How do we audit?

We don't give normal users access to the auditing functions. These are usually only available to an Administrator.

So first I need to log on as an Administrator to the DRM and tell it exactly how I would like my request system to be audited, see next screen:

DRM [RecFind 6]

### Select a task to complete

What task would you like to perform?

- Configure Tables and Fields
- Configure Link Tables
- Configure Security Codes
- Configure Security Groups
- Configure Users
- Configure Error Messages
- Configure Warning Messages
- Configure Triggers
- Configure Filters
- Configure Scheduled Tasks
- Configure Language Settings
- Configure MetadataProfile Type Associations
- Configure Auto Numbers
- Configure Processes
- Backup The Database
- Re-Index The Database
- Synchronize with Active Directory
- Change Configuration Settings
- Change Calendar Settings
- Configure Audit Trail Settings
- Manage Licenses
- Configure ToolBar

0 Active users

Back Close

### Configure Audit Trail Settings

#### Audit Trail Configuration

Tables	Methods
Depreciation	<input checked="" type="checkbox"/> Audit Record as XML On Insert
Document Type	<input checked="" type="checkbox"/> Audit Changes as XML On Modify
EDOC	<input checked="" type="checkbox"/> Audit Record as XML On Delete
Entity	<input checked="" type="checkbox"/> Add
Error Log	<input checked="" type="checkbox"/> Boolean
Error Message	<input checked="" type="checkbox"/> Clone
Escalation	<input checked="" type="checkbox"/> Delete
Export Format	<input checked="" type="checkbox"/> Export
Extended Metadata	<input checked="" type="checkbox"/> External ID
Field	<input checked="" type="checkbox"/> Metadata
Field Link	<input checked="" type="checkbox"/> Modify
Filter	<input checked="" type="checkbox"/> Print
Font	<input type="checkbox"/> Process
Forms	<input checked="" type="checkbox"/> Range
Help Screen	<input type="checkbox"/> Replay
Holiday	<input type="checkbox"/> Save Search
Icon	<input checked="" type="checkbox"/> Search
<b>Incident</b>	<input checked="" type="checkbox"/> Select
Industry Code	<input checked="" type="checkbox"/> Sort
Invoice	<input checked="" type="checkbox"/> View
Job History	
Job History Benefit	
Job Rating	
JobTitle	
K1 Configuration	
K1 Start Point	
Language	

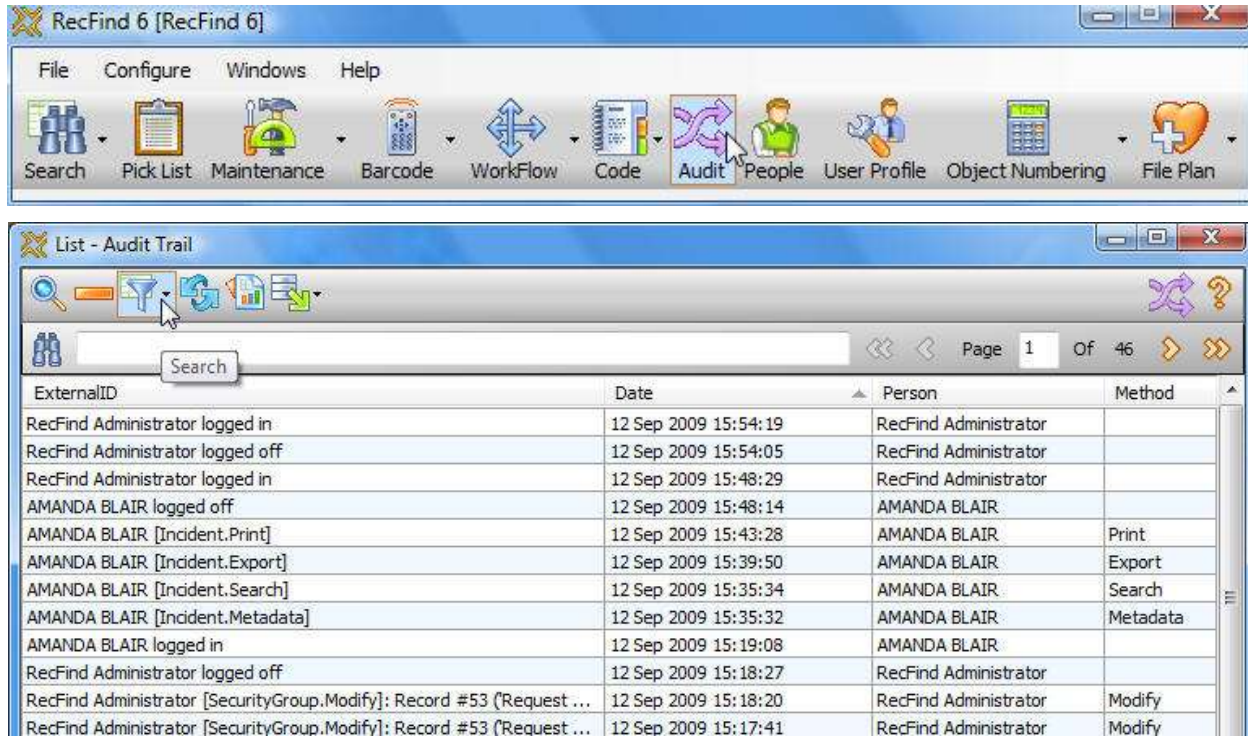
Audit Log Ins    Audit Log Offs    Audit Unsuccessful Log Ins

Save Return

In the above example I have chosen to write an audit record every time one of the ticked transactions takes place. It is 100% configurable for every table in RecFind 6.

I have also chosen to use an advanced feature that also takes a full 'image' of the record and embeds it in the audit trail record in XML. See the top three ticked boxes on the right. This means that you can re-create the entire record at any time in the future.

Now as the Administrator, I can log into RecFind 6 and select the Audit trail function to list and search or print any audit trail record.

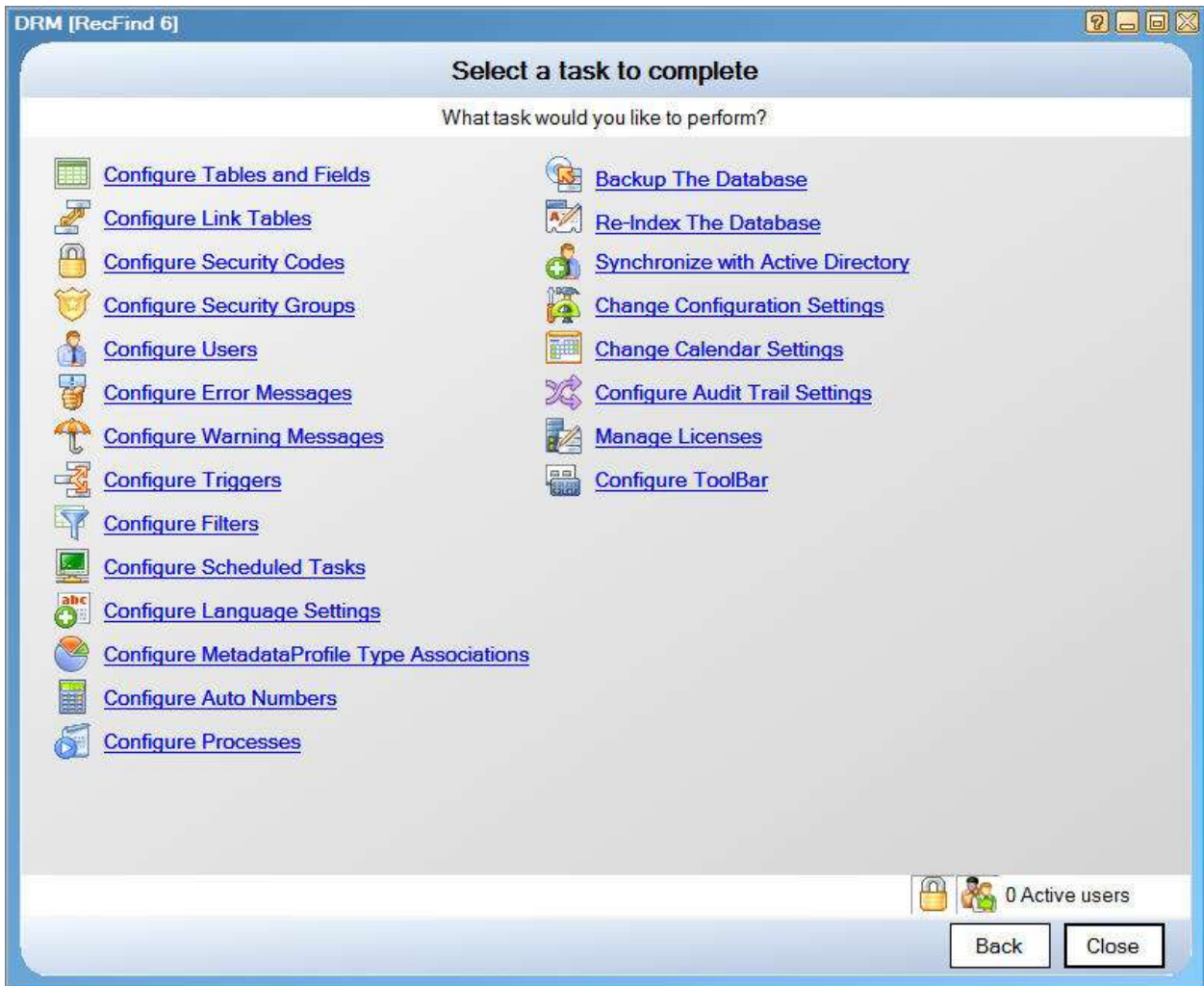


## Step by Step

**Note:** This is not supposed to be a detailed training manual, just an overview. I have not gone into all the levels of detail required to configure the full request system, it would be too lengthy and too confusing.

For an expert RecFind 6 user, there is about one to two days work (depending upon the options you want) to completely configure this application within RecFind 6.

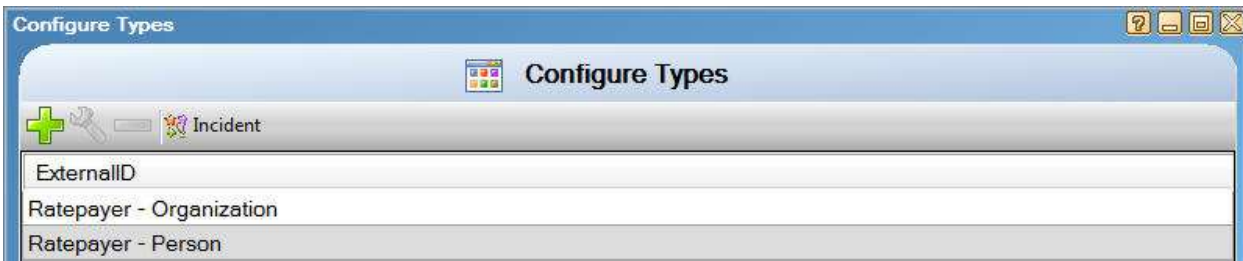
Log into the DRM



Select "Configure Tables and Fields".

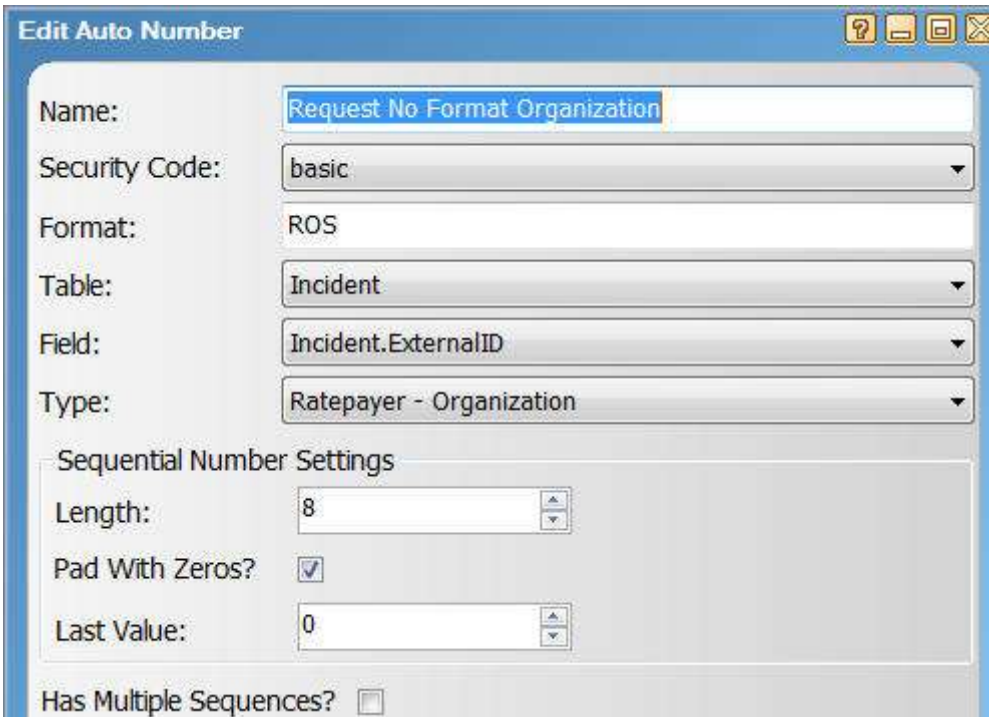
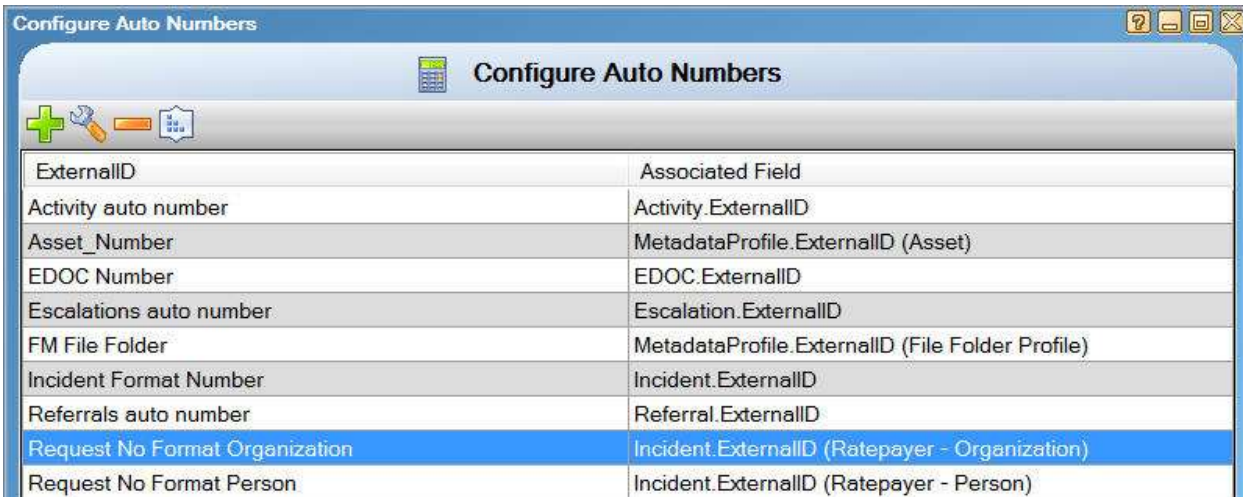
Select the Incident table, select 'Modify', make it type configurable if it is not already so.

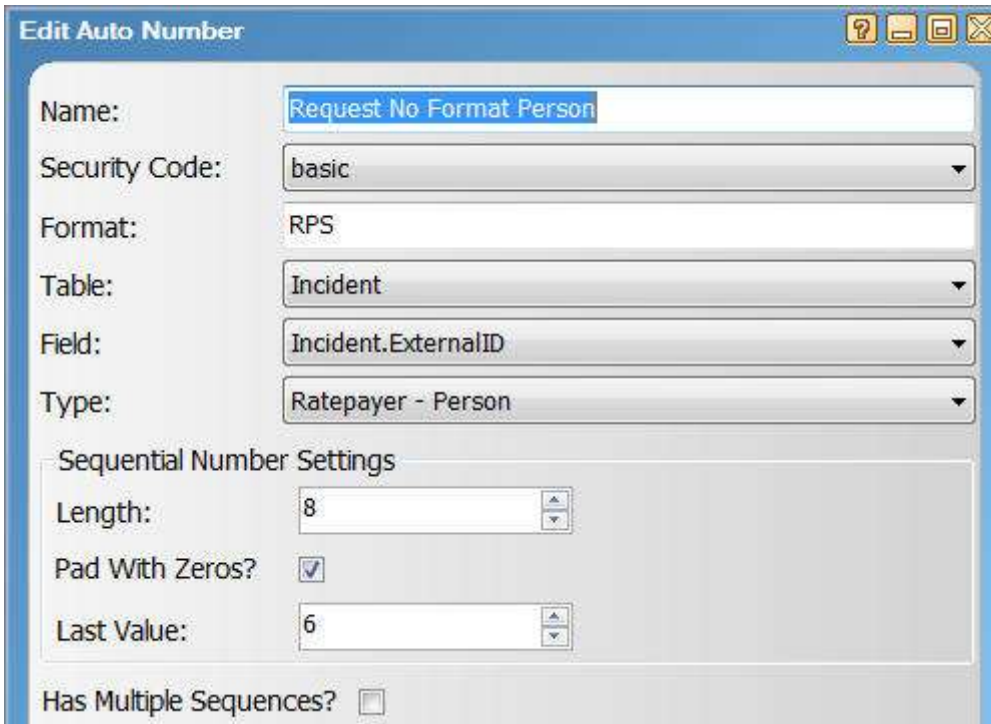
Select the Incident table, select 'Types', add your two new type codes, e.g.



Select "Configure Auto Numbers"

Add your two new auto numbers, one for each type of request.

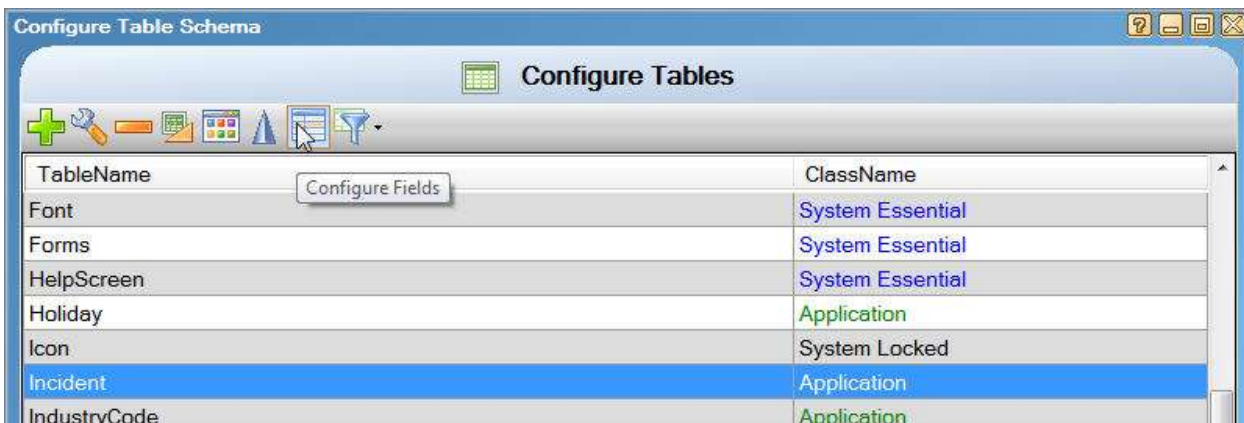




Select "Configure Tables and Fields".

Select Incident table.

Select "Configure Fields".



Select each type in turn and configure the fields and captions and default value as you require them.



My examples below:

Configure Fields

Incident Type: Ratepayer - Person  Visible Only

Caption	Name	DataType	Essential	Locked
Request Number	ExternalID	NVarChar	Yes	No
Type	TypeID	Int	Yes	No
ContactPerson	ContactPersonID	Int	No	No
Request Type	Request_Type	Int	No	No
Description	Description	NVarChar	No	No
Priority	PriorityID	Int	No	No
#DaysOpen	OpenDays	Int	No	No
CorrectiveAction	CorrectiveAction	NVarChar	No	No
InitialSupportPerson	InitialSupportPersonID	Int	No	No
CurrentSupportPerson	CurrentSupportPersonID	Int	No	No
DateRegistered	RegisteredDate	Date Time	No	No
DateClosed	ClosedDate	Date Time	No	No
Close Type	CloseTypeID	Int	No	No
CurrentStatus	StatusID	Int	No	No
Escalations	Escalation.IncidentID			
Referrals	Referral.IncidentID			
Activities	LinkIncidentActivity.IncidentID			
LinkedIncidents	LinkIncidentIncident.SourceIncidentID			
EDOCs	LinkIncidentEDOC.IncidentID			
File Folders	LinkIncidentMetadataProfile.IncidentID			
SecurityCode	SecurityID	Int	Yes	No

Return

Configure Fields

Incident Type: Ratepayer - Organization  Visible Only

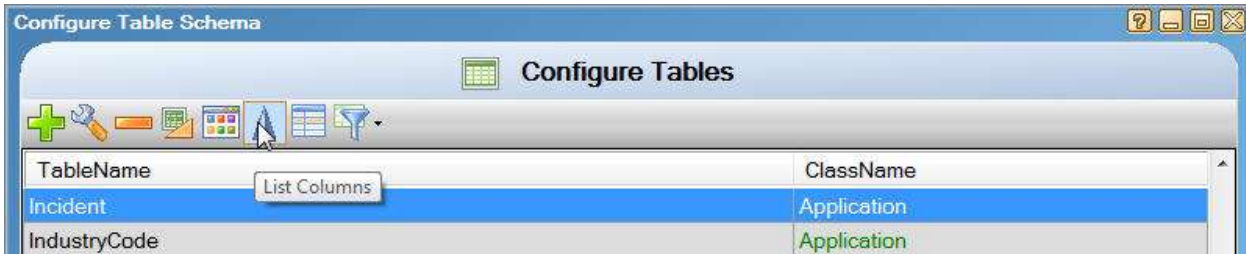
Caption	Name	DataType	Essential	Locked
Request Number	ExternalID	NVarChar	Yes	No
Type	TypeID	Int	Yes	No
CustomerName	CustomerEntityID	Int	No	No
ContactPerson	ContactPersonID	Int	No	No
Request Type	Request_Type	Int	No	No
Description	Description	NVarChar	No	No
Priority	PriorityID	Int	No	No
#DaysOpen	OpenDays	Int	No	No
CorrectiveAction	CorrectiveAction	NVarChar	No	No
InitialSupportPerson	InitialSupportPersonID	Int	No	No
CurrentSupportPerson	CurrentSupportPersonID	Int	No	No
DateRegistered	RegisteredDate	Date Time	No	No
DateClosed	ClosedDate	Date Time	No	No
Close Type	CloseTypeID	Int	No	No
CurrentStatus	StatusID	Int	No	No
Escalations	Escalation.IncidentID			
Referrals	Referral.IncidentID			
Activities	LinkIncidentActivity.IncidentID			
LinkedIncidents	LinkIncidentIncident.SourceIncidentID			
EDOCs	LinkIncidentEDOC.IncidentID			
File Folders	LinkIncidentMetadataProfile.IncidentID			
SecurityCode	SecurityID	Int	Yes	No

Return

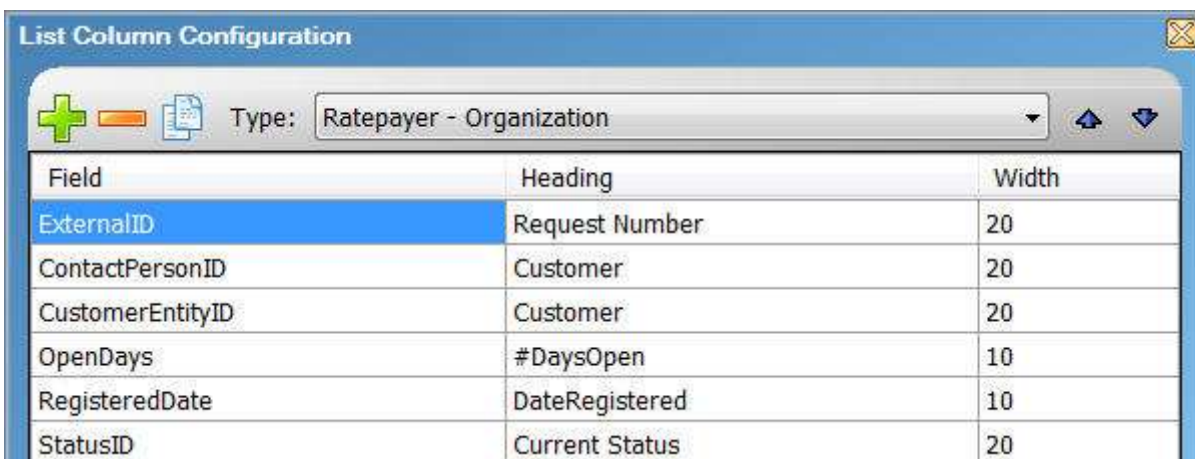
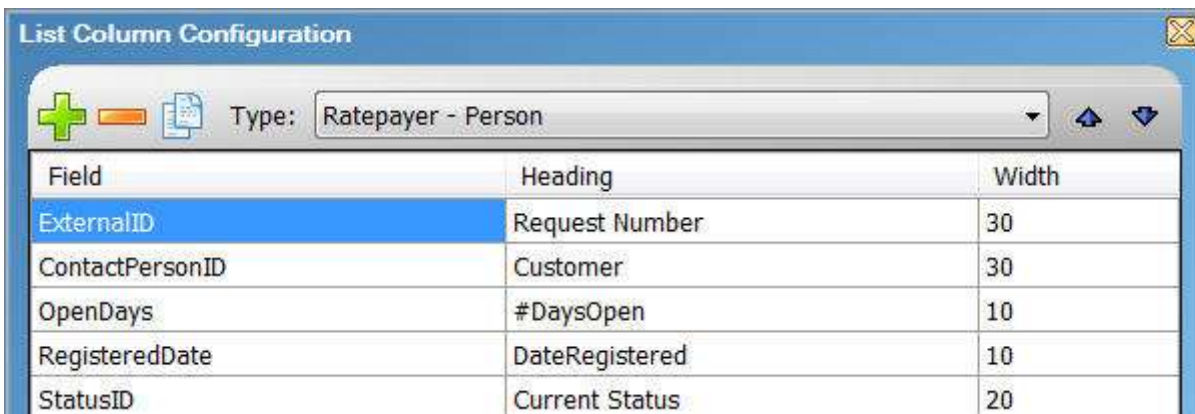
**Note 1:** - I am not assuming that you will understand all of this without first attending a training course. These processes also assume a certain knowledge of databases, data models and data types so most of you will require assistance from your IT support person when configuring tables in RecFind 6. It is true no programming is required but a certain degree of IT knowledge is required.

**Note 2:** - I have also not shown you all the detail changes I have made to the fields, tables and filters. This level of detail won't make much sense (and would only confuse you) until after you have done a training course.

Select the Incident table.

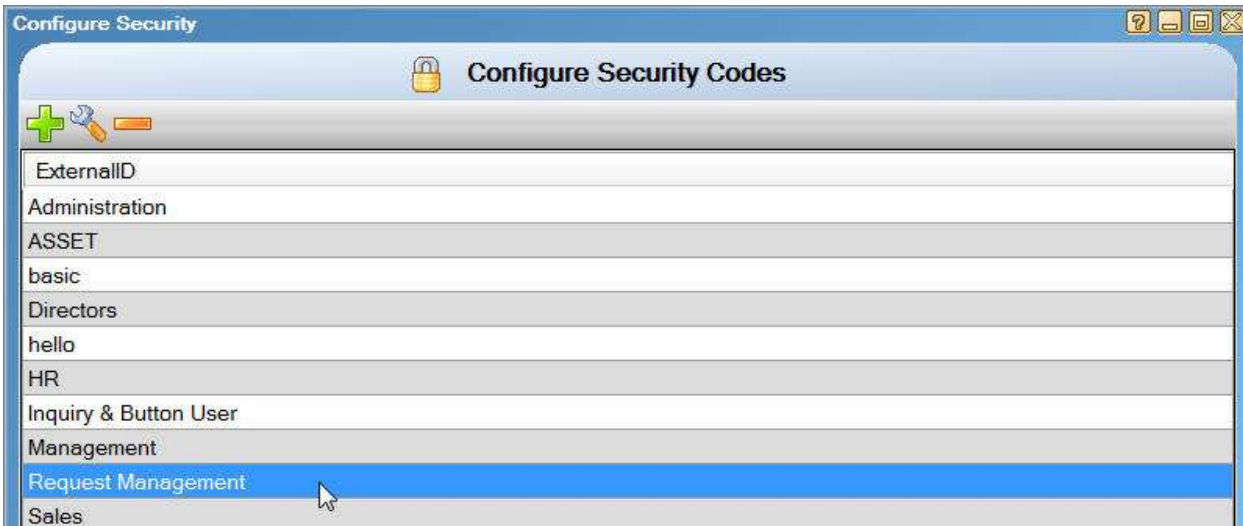


Now configure the columns and headings you want displayed with your data.



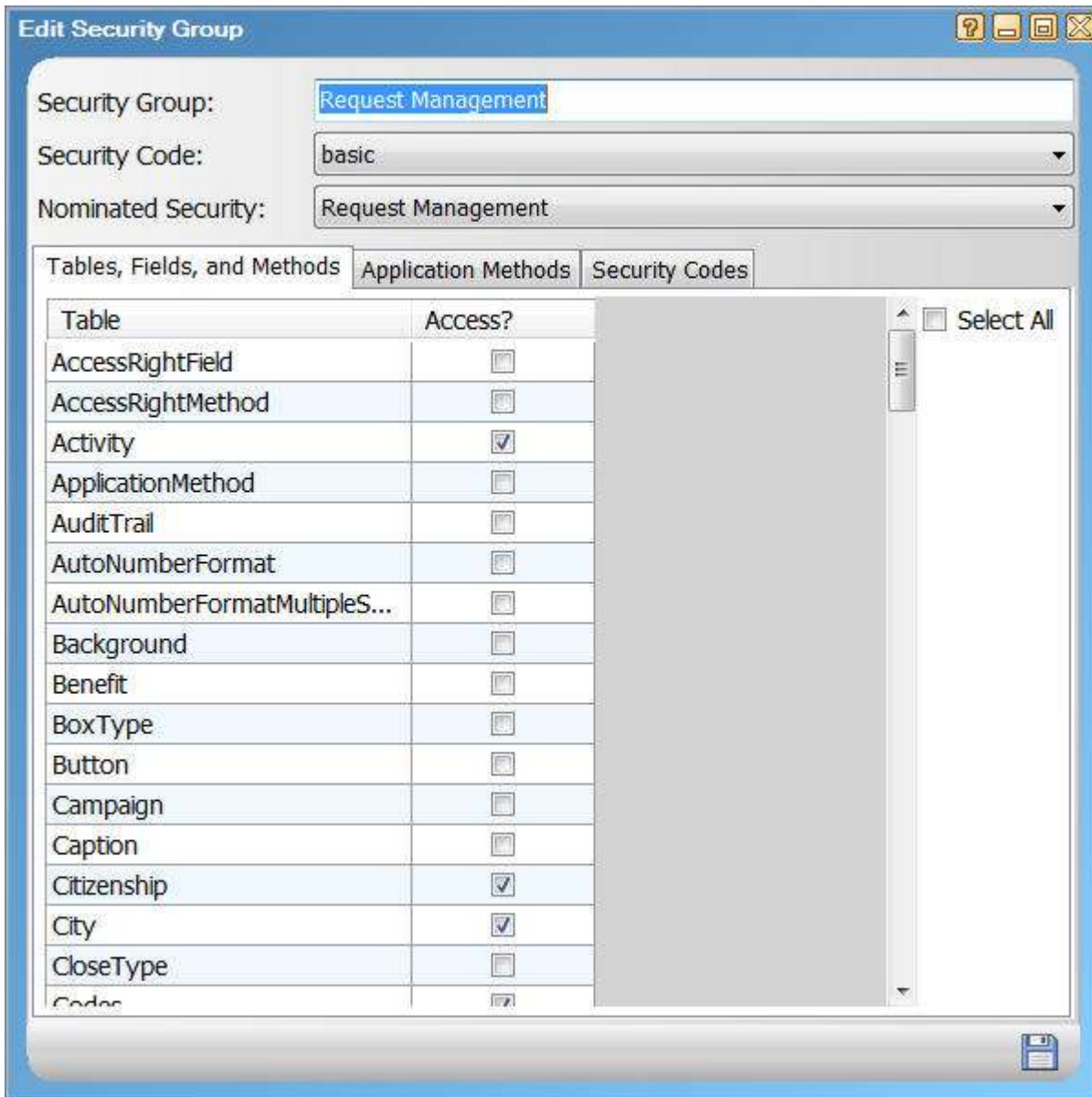
Select "Configure Security Codes"

Add your 'Request Management' security code.



Select 'Configure Security Groups'.

Add your 'Request Management' security group. This is the security group you assign to request staffers to control their access to RecFind 6.



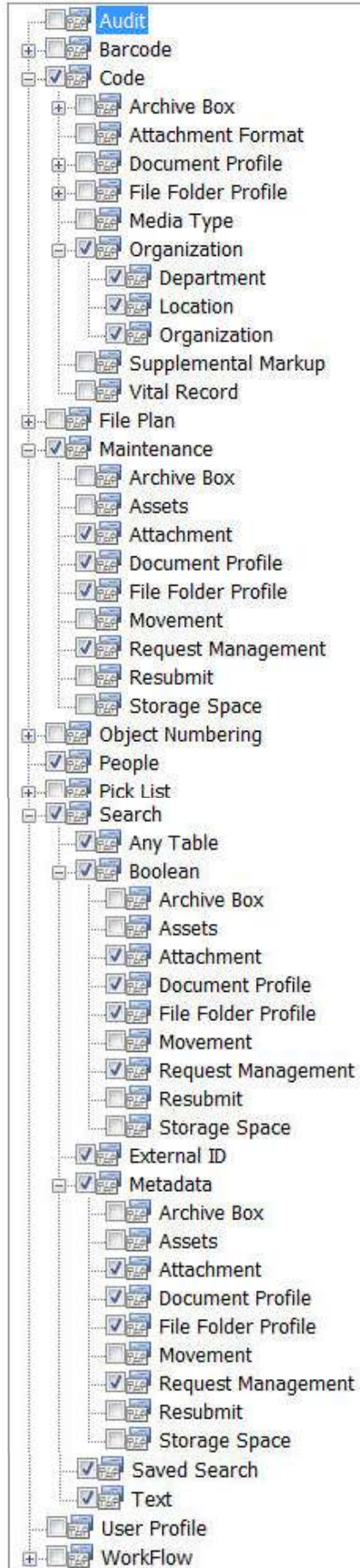
The only tables I have provided access to are the:

1. Activity
2. Citizenship
3. City
4. Codes
5. Country
6. DepartmentDivision
7. DocumentType
8. EDOC
9. Entity
10. Escalation
11. Incident
12. Location
13. MetadataProfile
14. Notes
15. Person
16. Priority
17. Reference
18. Referral
19. State
20. Type

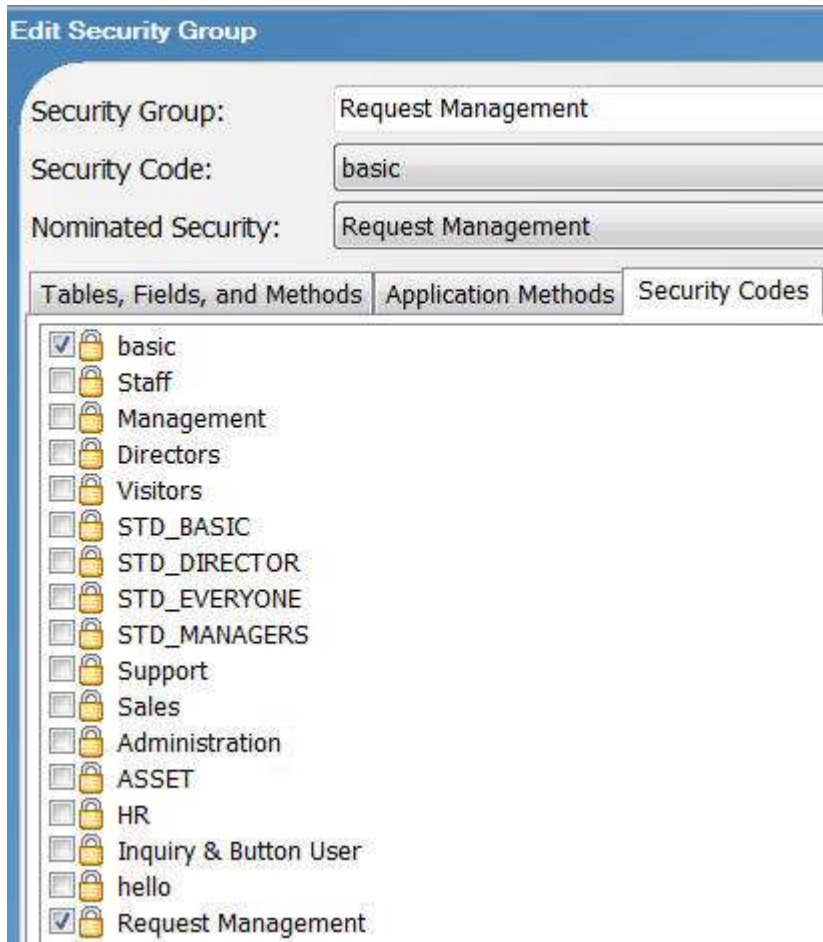
Some of these I didn't use in this example but thought I may use later.

I didn't assign security to the fields in each table, I just accepted the defaults. You however, may want to think about what fields you want the users to be able to access in each of the tables I have selected.

The following are the 'Methods' I gave the request users access to. This also determines what they see on their RecFind 6 toolbar.



And finally these are the security codes I allowed request users. This means that the only 'records' of any type they can see in the RecFind database are ones with these security codes. **Note:** Each user MUST always have access to the 'Basic' security code.



## Summary

In my experience, configuring applications in RecFind 6 requires a new way of thinking for most people, even very experienced users and IT people. The most common expression I hear from new RecFind users is, "Frank, I need to get my head around this". This is because the DRM is a whole new type of tool. Most of you have never seen a tool with these capabilities. Most of you have never used an application that allowed you to configure it to the level allowed in RecFind 6. This really is a whole new genre of application, literally able to become whatever you need it to be.

Most of you are used to the laborious and expensive process of getting the vendor to make changes for you. The good news is that with the DRM and RecFind 6 you can now make those changes yourself without having to wait on the vendor and with no expenses other than your time.

Frank McKenna  
CEO  
Knowledgeone Corporation