



Using RecFind 6 as a Customer Request Management System

Maintaining all data in the one system

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File	Configure	Windows	Help						
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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.

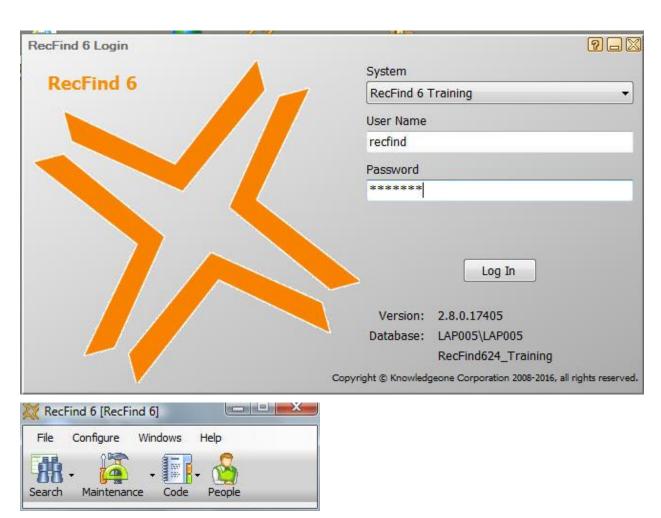
How?

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).

X RecFin	nd 6 [RecFind 6]	x
File C	Configure Windows Help	
Search	Maintenance	
DRM	File Folder Profile	
	Document Profile	
	Attachment	
RecFind 6 RecScan	Request Management	

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

💥 List - Incident		1000		
Q 🕂 🔧 💳 [〕 ♀ • ७, • , • , • , •, •			館?
89			< 3 < 3	Page 1 Of 1 🚫 👀
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.

Select A Type	9 -X
Туре	
Ratepayer - Organization	
Ratepayer - Person	

I select Person and click OK.

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

戧		? ⊟ ∷
*Request Number	RP(Sequence)	
Туре	Ratepayer - Person	
*ContactPerson		•0
*Request Type		•
*Description	F	E
Priority #DaysOpen		•
CorrectiveAction	F	ABC
InitialSupportPerson		-0
CurrentSupportPerson		• 0
DateRegistered	₩ I2 Sep 2009 02:14:40 PM	
DateClosed		
CloseType	AB	0
*CurrentStatus		• 🥖
Escalations	*	
Referrals	*	
Activities	*	
LinkedIncidents	*	-

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

EDOCs	·	
File Folders	*	
*SecurityCode	Request Management	• 🦉 -

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.

*Request Number				
Request Number	RP0000006			
уре	🛐 Ratepayer - Person			
ContactPerson	🔁 George Bush			
Request Type	Animal			
Description	There is a kangaroo in my yard and ir is attacking my dog. Can you please send animal contraol	There is a kangaroo in my yard and ir is attacking my dog. Can you please send animal contraol ASAP?		
Priority	Urgent - Immediate action required			
#DaysOpen	0			
CorrectiveAction	Refer this to animal control and ask foran immediate response			
nitialSupportPerson				
CurrentSupportPerson	Frank McKenna			
ateRegistered	12 Sep 2009 02:14:40 PM			
ateClosed				
CloseType	B.			
	OPEN			
CurrentStatus				
CurrentStatus				
	1 related record(s)			
scalations	I related record(s) ExternalID RelatedIncident DateofReferral REFERRAL00000002 RP00000006 12 Sep 2009 14:2	ReferredTo		

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:

💥 Metadata Search - Incident	
<u></u>	
🔲 📴 🛃 *Incident Number	
🗆 🔂 Туре 🛛 🕅 🖉 🔍 📃	
Description	
Priority	
#DaysOpen	
CorrectiveAction	
ProductorService	
ReleaseVersion#	
InitialSupportPerson	
CurrentSupportPerson	
CustomerName	
DateRegistered	
DateClosed	

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.

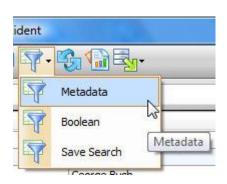
This is my search screen.

💥 Metadata Search - Incident		
愈		
Thread and the second s		
🔽 💼 🚰 Туре	Ratepayer - Person	
Request Type		
Description	F	
Priority		
The particity #DaysOpen		
CorrectiveAction	F	
	₩ & L	
ReleaseVersion#		
E Function		
InitialSupportPerson		
CurrentSupportPerson		
CustomerName		
ContactPerson	EV 🖉 🛃 George Bush	
🔽 🖃 🛃 DateRegistered	I Sep 2009 03:32:38 PM	12 Sep 2009 03:32:38 PM
DateClosed		
CloseType	ET & B.	
CurrentStatus		
SecurityCode	TAL	

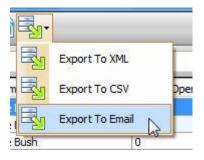
And this is my results screen:

💥 Metadata Search - Inci	dent			
Q 🕂 🔌 💳 🗗	₽ • 🖏 🖬 🛃 •			館るく
89 7			3 20	Page 1 Of 1 🖇 🚿
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
RP0000006	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 r or I could export one or more or all records in one of three formats, see below:



And finally, I could produce a report, is 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).

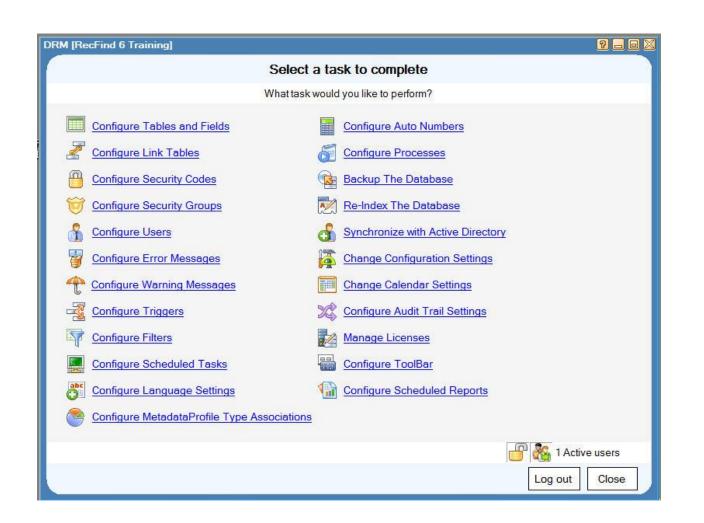
We can create (and then save for re-use) a brand new report, we can modify (and save for reuse) an existing report or we can just use one of the standard or already saved reports.



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:

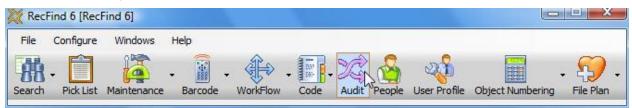


Configure Audit Trail Settings	9 - 8
Auc	dit Trail Configuration
Tables Depreciation Document Type EDOC Entity Error Log Error Message Escalation Export Format Extended Metadata Field Field Link Filter Font Forms Help Screen Holiday Icon Industry Code Invoice Job History Job History Benefit Job Title K1 Configuration K1 Start Point Language	Methods Audit Record as XML On Insert Audit Changes as XML On Modify Audit Record as XML On Delete Add Boolean Clone Delete Export External ID Metadata Modify Print Process Range Replay Save Search Select Sort View
Audit Log Ins V Audit Log Offs V Audit Unsue	ccessful Log Ins
	Save

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.



💥 List - Audit Trail			
			ZÇ °
Search		🐼 🔇 Page 1 Of	46 📎 🛇
ExternalID	Date	🔺 Person	Method
RecFind Administrator logged in	12 Sep 2009 15:54:19	RecFind Administrator	
RecFind Administrator logged off	12 Sep 2009 15:54:05	RecFind Administrator	
RecFind Administrator logged in	12 Sep 2009 15:48:29	RecFind Administrator	
AMANDA BLAIR logged off	12 Sep 2009 15:48:14	AMANDA BLAIR	
AMANDA BLAIR [Incident.Print]	12 Sep 2009 15:43:28	AMANDA BLAIR	Print
AMANDA BLAIR [Incident.Export]	12 Sep 2009 15:39:50	AMANDA BLAIR	Export
AMANDA BLAIR [Incident.Search]	12 Sep 2009 15:35:34	AMANDA BLAIR	Search
AMANDA BLAIR [Incident.Metadata]	12 Sep 2009 15:35:32	AMANDA BLAIR	Metadata
AMANDA BLAIR logged in	12 Sep 2009 15:19:08	AMANDA BLAIR	
RecFind Administrator logged off	12 Sep 2009 15:18:27	RecFind Administrator	
RecFind Administrator [SecurityGroup.Modify]: Record #53 ('Request	12 Sep 2009 15:18:20	RecFind Administrator	Modify
RecFind Administrator [SecurityGroup.Modify]: Record #53 ('Request	12 Sep 2009 15:17:41	RecFind Administrator	Modify

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

DRM [RecFind 6 Training]		? 🗕 🖬 💥
Selec	ct a task to complete	
What tas	sk would you like to perform?	
Configure Tables and Fields	Configure Auto Numbers	
Configure Link Tables	Configure Processes	
Configure Security Codes	Backup The Database	
Configure Security Groups	Re-Index The Database	
Configure Users	Synchronize with Active Directory	
Configure Error Messages	Change Configuration Settings	
Configure Warning Messages	Change Calendar Settings	
Configure Triggers	Configure Audit Trail Settings	
Configure Filters	Manage Licenses	
Configure Scheduled Tasks	Configure ToolBar	
Configure Language Settings	Configure Scheduled Reports	
Configure MetadataProfile Type Association	ins	
	📑 🍇 1 Active	users
	Log out	Close

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.

Configure Types		9 🗕 🛛 🛛
	Configure Types	
👍 🔧 📼 🙀 Incident		
ExternalID		
Ratepayer - Organization		
Ratepayer - Person		

Select "Configure Auto Numbers"

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

Configure Auto Numbers	9 - O X
C	onfigure Auto Numbers
🕂 🔦 💳 🗊	
ExternalID	Associated Field
Activity auto number	Activity.ExternalID
Asset_Number	MetadataProfile.ExternalID (Asset)
EDOC Number	EDOC.ExternalID
Escalations auto number	Escalation.ExternalID
FM File Folder	MetadataProfile.ExternalID (File Folder Profile)
Incident Format Number	Incident.ExternalID
Referrals auto number	Referral.ExternalID
Request No Format Organization	Incident.ExternalID (Ratepayer - Organization)
Request No Format Person	Incident.ExternalID (Ratepayer - Person)

2 - 0 2

Edit Auto Number

Name:	Request No Format Organization
Security Code:	basic 🔹
Format:	ROS
Table:	Incident
Field:	Incident.ExternalID 🔹
Туре:	Ratepayer - Organization
Sequential Numbe	er Settings
Length:	8
Pad With Zeros?	
Last Value:	0
Has Multiple Sequer	nces?

Name:	Request No Format Person	
Security Code:	basic	•
Form <mark>at:</mark>	RPS	
Table:	Incident	•
Field:	Incident.ExternalID	•
Туре:	Ratepayer - Person	•
Sequential Numb	er Settings	
Length:	8	
Pad With Zeros?		
Last Value:	6	

Select "Configure Tables and Fields".

Select Incident table.

Select "Configure Fields".

Configure Table Schema		? - 0 ×
Configu	re Tables	
🕂 🔦 🛲 🖭 \Lambda 戻 🖓 ·		
TableName Configure Fields	ClassName	*
Font	System Essential	
Forms	System Essential	
HelpScreen	System Essential	
Holiday	Application	
Icon	System Locked	
Incident	Application	
IndustryCode	Application	

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

		Configure Fields		20	
л Т	📲 🔧 🥅 🎊 Incident	Type: [Default]		Visible	Only 👍 💎 🛛
	Caption	Name [Default] Ratepayer - Organization		Essential	Locked
	Incident Number	Externa Ratepayer - Person	N	Yes	No
9	Туре	TypelD	Int	Yes	No
9	Request Type	Request_Type	Int	No	No
	Description	Description	NVarChar	No	No
9	Priority	PriorityID	Int	No	No
	#DaysOpen	OpenDays	Int	No	No
*	File Folders	LinkIncidentMetadataProfile.Inciden		3	
	CorrectiveAction	CorrectiveAction	NVarChar	No	No
9	ProductorService	ProductServiceID	Int	No	No
	ReleaseVersion#	ReleaseNumber	NVarChar	No	No
9	Function	MethodID	Int	No	No
9	InitialSupportPerson	InitialSupportPersonID	Int	No	No
9	CurrentSupportPerson	CurrentSupportPersonID	Int	No	No
9	CustomerName	CustomerEntityID	Int	No	No
9	ContactPerson	ContactPersonID	Int	No	No
	DateRegistered	RegisteredDate	DateTime	No	No
	DateClosed	ClosedDate	DateTime	No	No
9	CloseType	CloseTypelD	Int	No	No
9	CurrentStatus	StatusID	Int	No	No
¥	Escalations	Escalation IncidentID			

My examples below:

Configure Fields				
🕨 🔏 🚃 🗱 Incident	Type: Ratepayer - Person	•	Visible Or	ily 👍 💎
Caption	Name	DataType	Essential	Locked
Request Number	ExternalID	NVarChar	Yes	No
9 Type	TypelD	Int	Yes	No
𝒫 ContactPerson	ContactPersonID	Int	No	No
9 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	DateTime	No	No
DateClosed	ClosedDate	DateTime	No	No
P CloseType	CloseTypeID	Int	No	No
𝒫 CurrentStatus	StatusID	Int	No	No
* Escalations	Escalation.IncidentID			8 (1)
₭ Referrals	Referral.IncidentID			
₭ Activities	LinkIncidentActivity.IncidentID			
* LinkedIncidents	LinkIncidentIncidentSourceIncidentID			
* EDOCs	LinkIncidentEDOC.IncidentID	2		8
₭ File Folders	LinkIncidentMetadataProfile.IncidentID			
SecurityCode	SecurityID	Int	Yes	No

Configure Fields				
🕨 🔧 📖 🞊 Incident	Type: Ratepayer - Organization	•	Visible Or	nly 👍 💎
Caption	Name	DataType	Essential	Locked
Request Number	ExternalID	NVarChar	Yes	No
Туре	TypelD	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	DateTime	No	No
DateClosed	ClosedDate	DateTime	No	No
CloseType	CloseTypeID	Int	No	No
CurrentStatus	StatusID	Int	No	No
Escalations	Escalation.IncidentID			
Referrals	Referral.IncidentID			
Activities	LinkIncidentActivity.IncidentID			
LinkedIncidents	LinkIncidentIncident.SourceIncidentID	2 2		
EDOCs	LinkIncidentEDOC.IncidentID			
File Folders	LinkIncidentMetadataProfile.IncidentID			
SecurityCode	SecurityID	Int	Yes	No

<u>Note 1:</u> – 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.

Confi	gure Tables	
TableName List Columns	ClassName	
Incident	Application	
IndustryCode	Application	

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

👍 👝 📋 Type: Ratepay	ver - Person	•
Field	Heading	Width
ExternalID	Request Number	30
ContactPersonID	Customer	30
OpenDays	#DaysOpen	10
RegisteredDate	DateRegistered	10
StatusID	Current Status	20

List Column Configuration						
👍 🚍 📳 Type: Ratepa	-	4 7				
Field	Heading	Width				
ExternalID	Request Number	20				
ContactPersonID	Customer	20 20				
CustomerEntityID	Customer					
OpenDays	#DaysOpen	10				
RegisteredDate	DateRegistered	10				
StatusID	Current Status	20				

Select "Configure Security Codes"

Add your 'Request Management' security code.

Configure Security	<mark>- 0</mark> X
Configure Security Codes	
ExternalID	
Administration	
ASSET	
basic	
Directors	
hello	
HR	
Inquiry & Button User	
Management	
Request Management	
Sales	

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.

dit Security Group			28		
Security Group:	Re	quest Management			
Security Code:	ba	sic			
Nominated Security:	Request Management				
Tables, Fields, and Meth	ods	Application Methods	Security Codes		
Table		Access?	📩 🗖 Select .		
AccessRightField			E		
AccessRightMethod					
Activity		V			
ApplicationMethod					
AuditTrail					
AutoNumberFormat					
AutoNumberFormatMultipleS		eS			
Background					
Benefit					
ВохТуре					
Button					
Campaign					
Caption					
Citizenship					
City					
CloseType					
Codor					

The only tables I have provided access to are the:

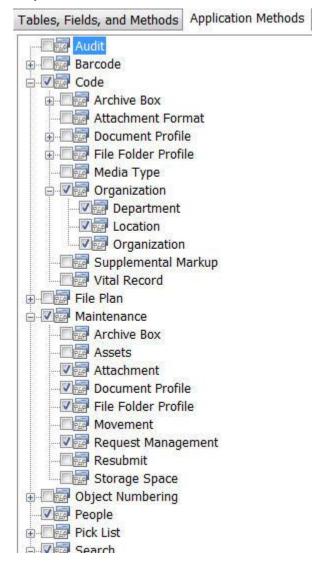
- 1. Activity
- 2. Citizenship
- 3. City
- 4. Codes
- 5. Country
- 6. DepartmentDivision
- 7. DocumentType

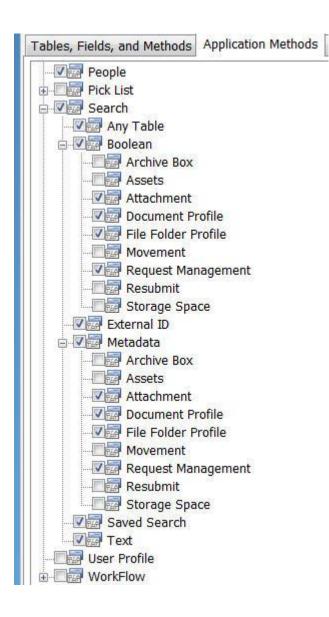
- 8. EDOC
- 9. Entity
- 10. Escalation
- 11. Incident
- 12. Location
- 13. MetadataProfile
- 14. Notes
- 15. Person
- 16. Priority
- 17. Reference
- 18. Referral
- 19. State
- 20. Type

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.

Edit Security Group					
Security Group:	Request Management				
Security Code:	basic Request Management				
Nominated Security:					
Tables, Fields, and Metho	ods Ap	plication Methods	Security Codes		
Staff Management Directors STD_BASIC STD_DIRECTOR STD_EVERYONE STD_MANAGERS SUpport Sales Administration ASSET HR Inquiry & Button Us hello					

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.

Best Regards,

Frank McKenna, CEO