RecFind 6

Using RecFind 6 as a Customer Request Management System

Maintaining all data in the one system

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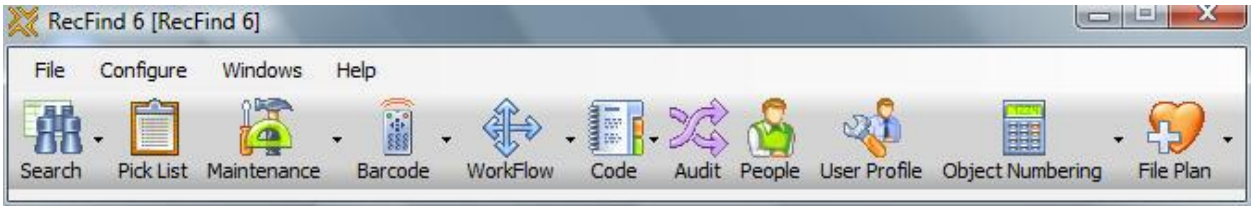


Introduction

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.

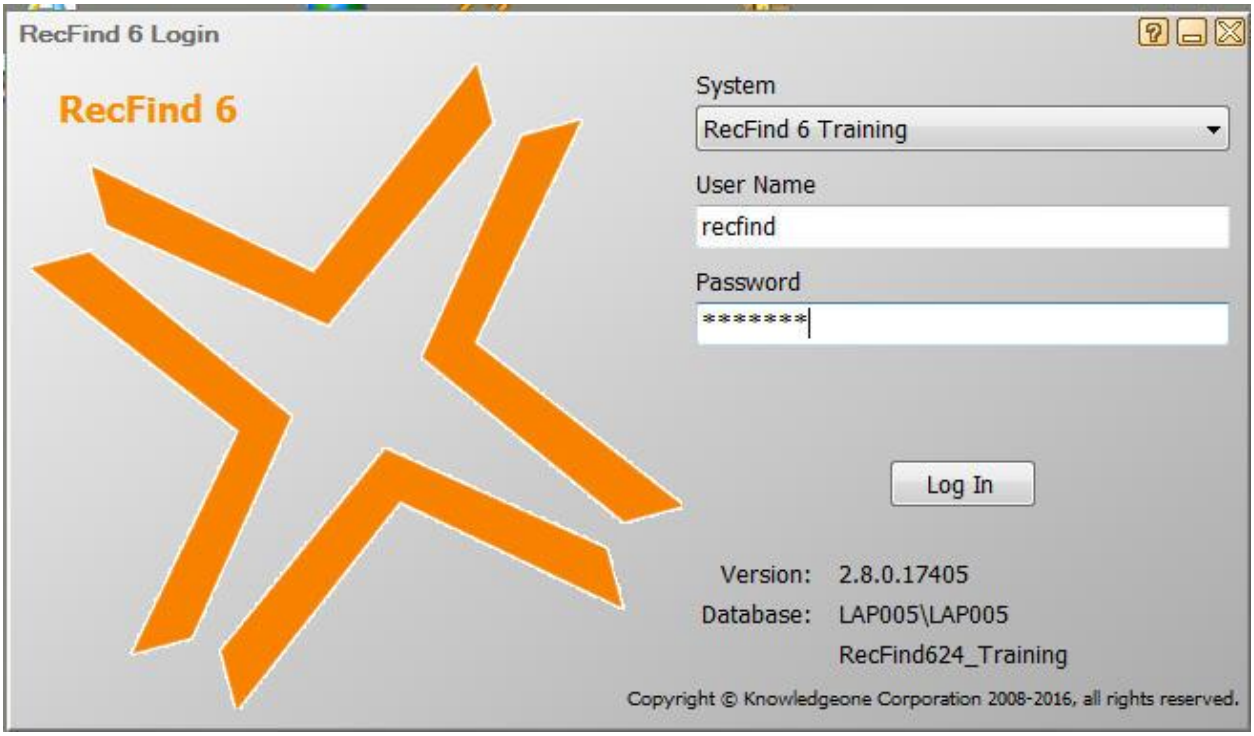
How?

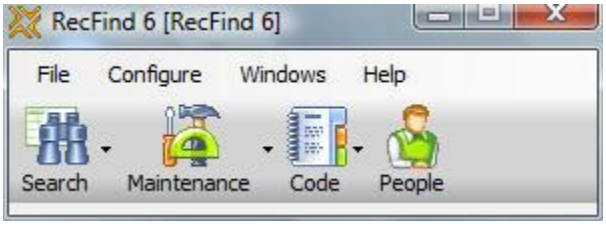
There are several ways to do this in RecFind 6 but the most appropriate, easiest and fastest way is to use the existing Incident table and processes. This provides around 80% or more of the functionality you will require and configuring it to achieve the following system should take not more than two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

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

Example

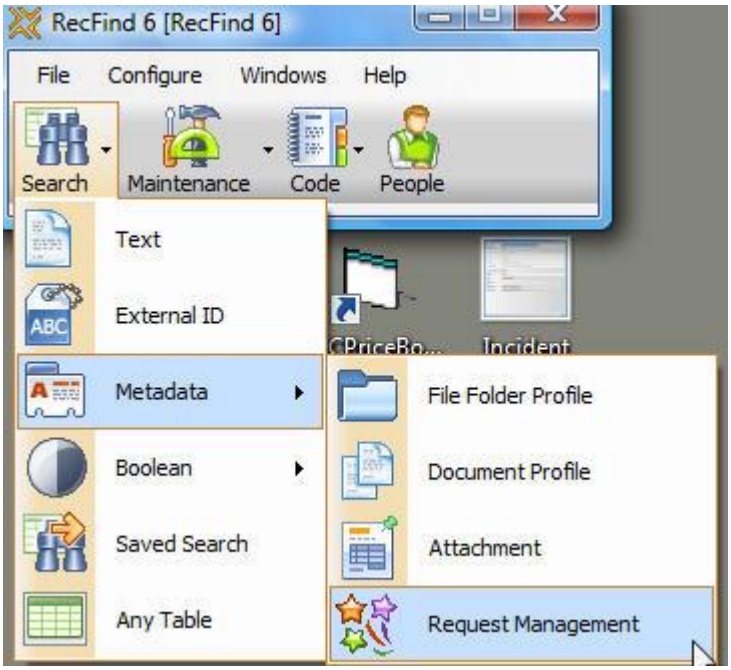
We have set up a new security code and new security group so when request management staff sign on all they see are the data and processes they require to do their job. This is what the RecFind 6 toolbar looks like after a request staffer signs on:



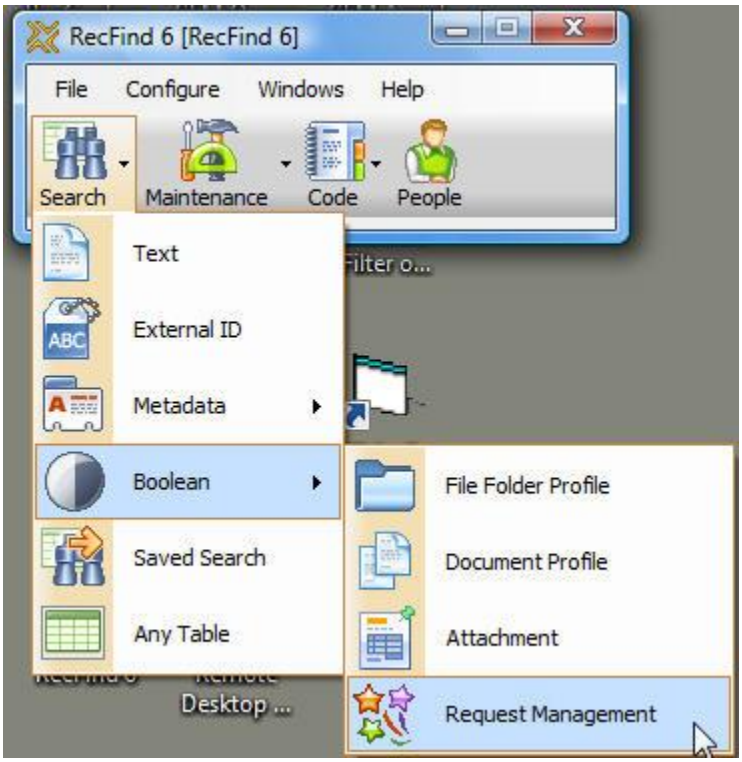


We have also used the DRM to add this new application to the toolbar. See below:

To the Metadata Search



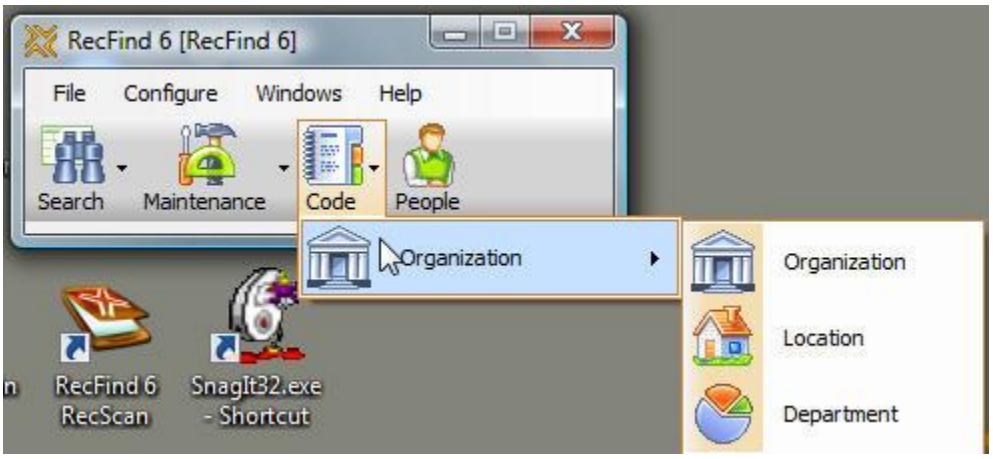
To the BOOLEAN Search



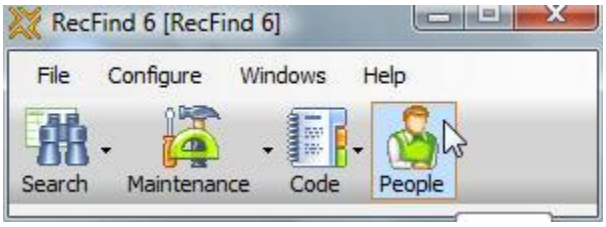
To the Maintenance Function

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

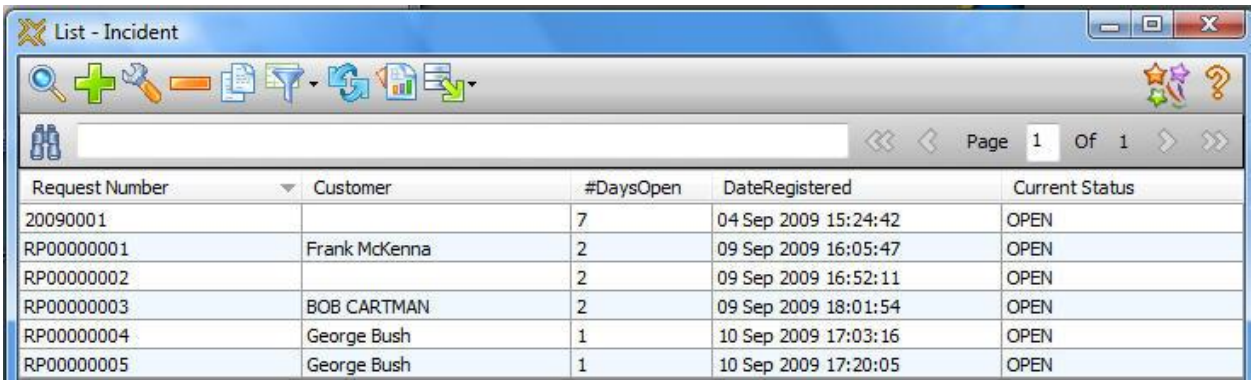


Operation

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

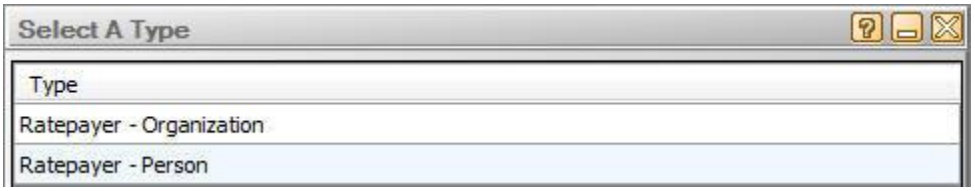
As with any RecFind 6 application the Methods (e.g., Add, Modify, Delete, etc) you display across the top and the columns and headings you display are 100% configurable using the DRM.

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.

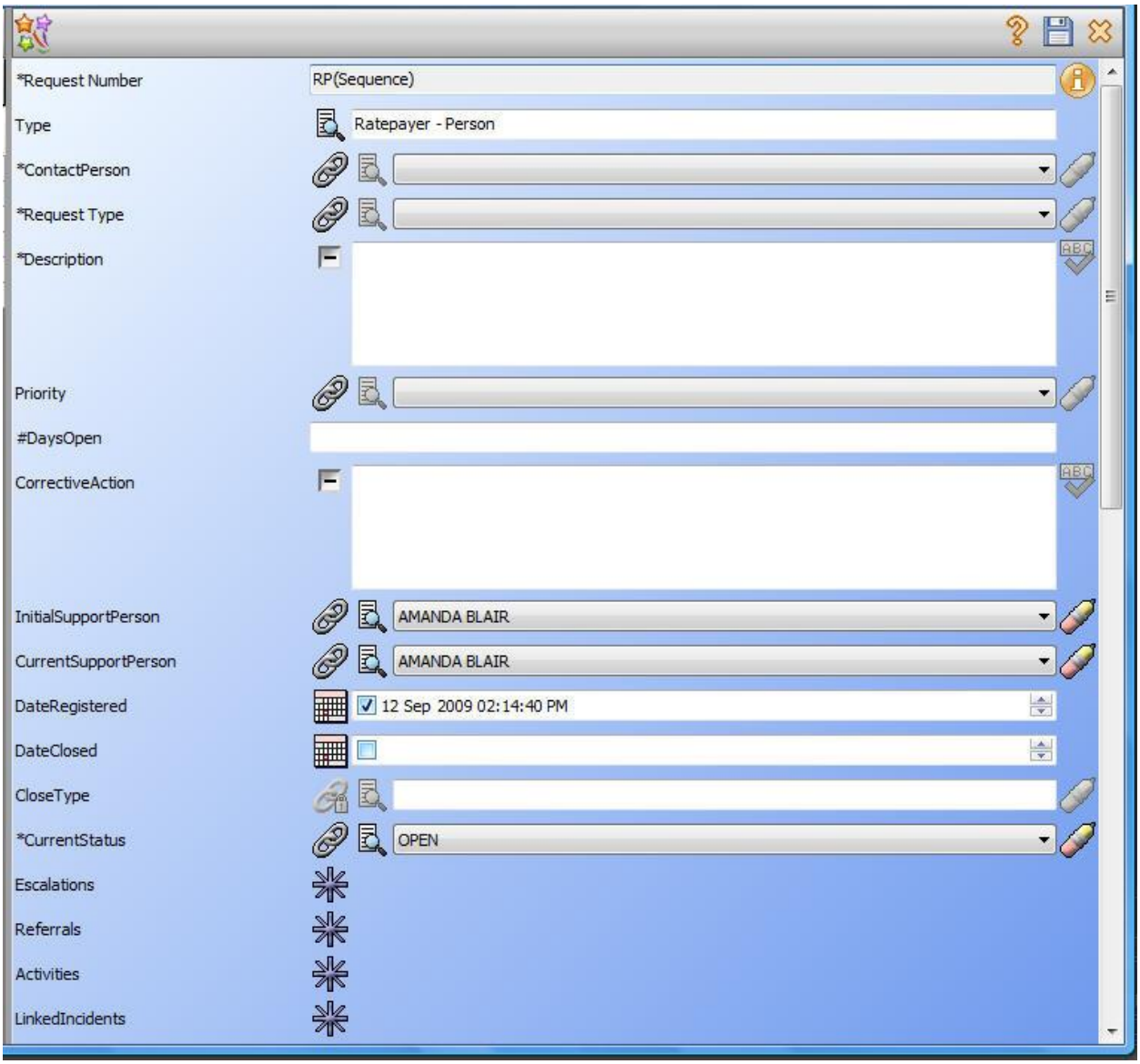
To add a new request click the add button

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.

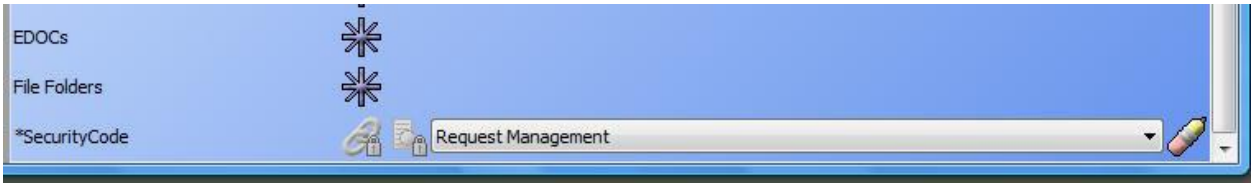


I select Person and click OK.

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.

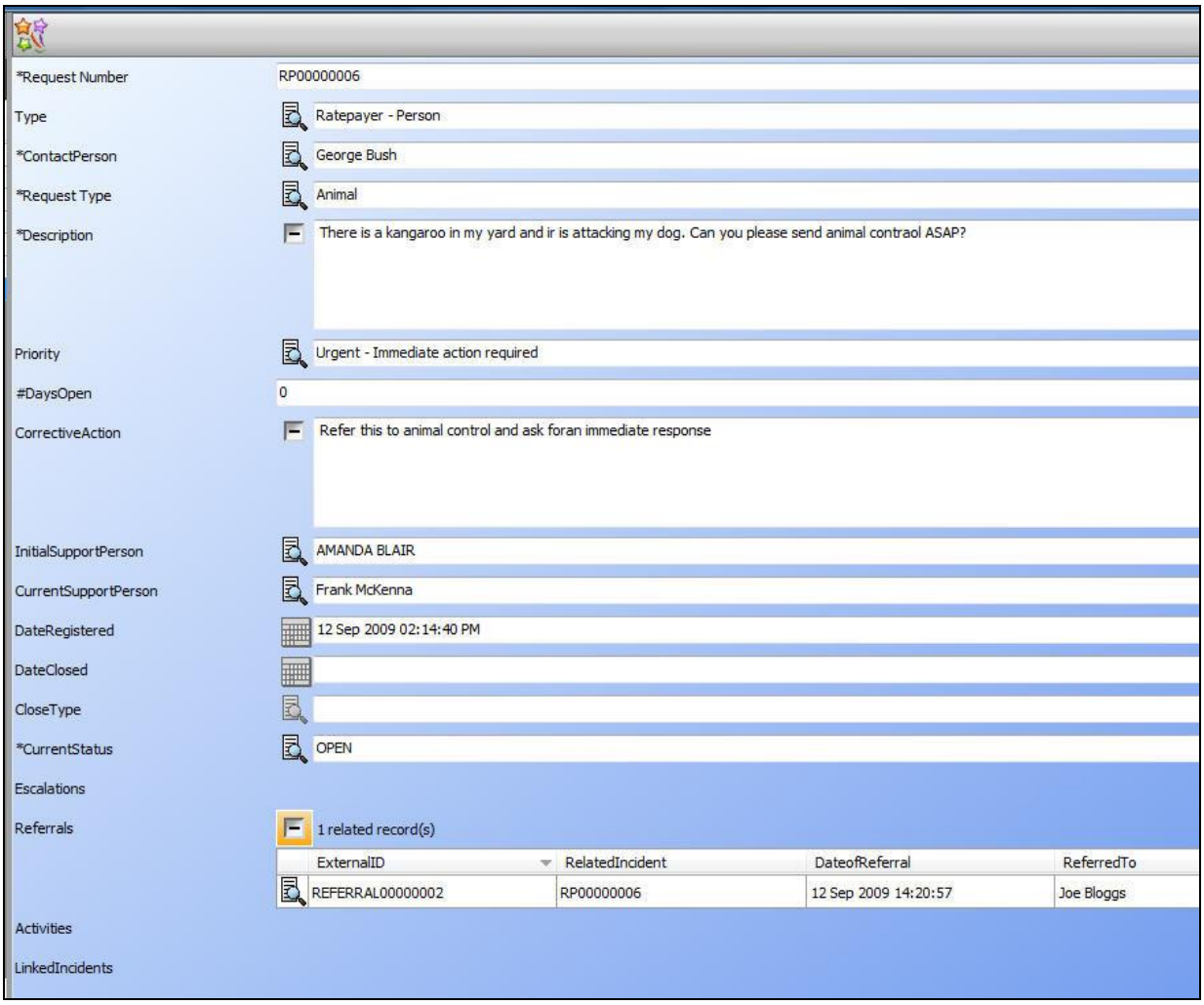
Any field beginning with an asterisk (*) is mandatory. The record cannot be stored until this field has been completed and has a value.

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 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.

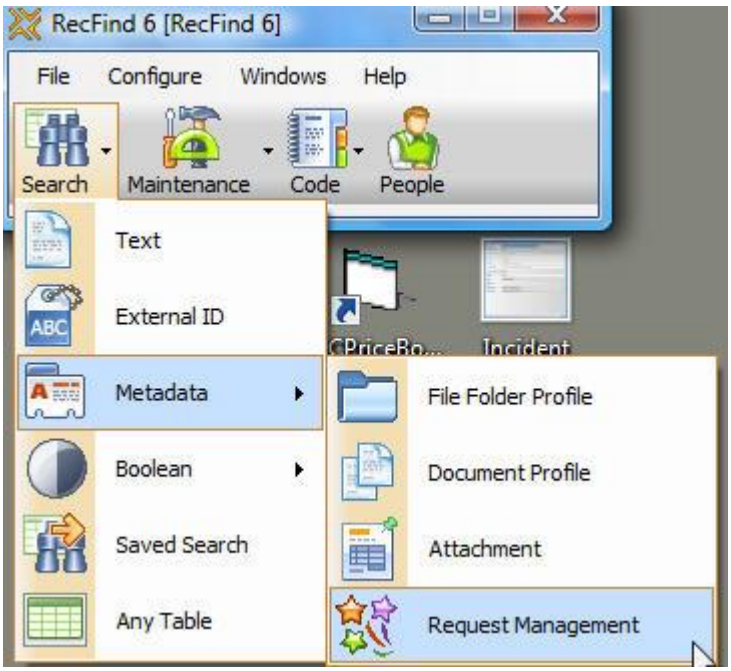
How do we know when something is overdue?

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.

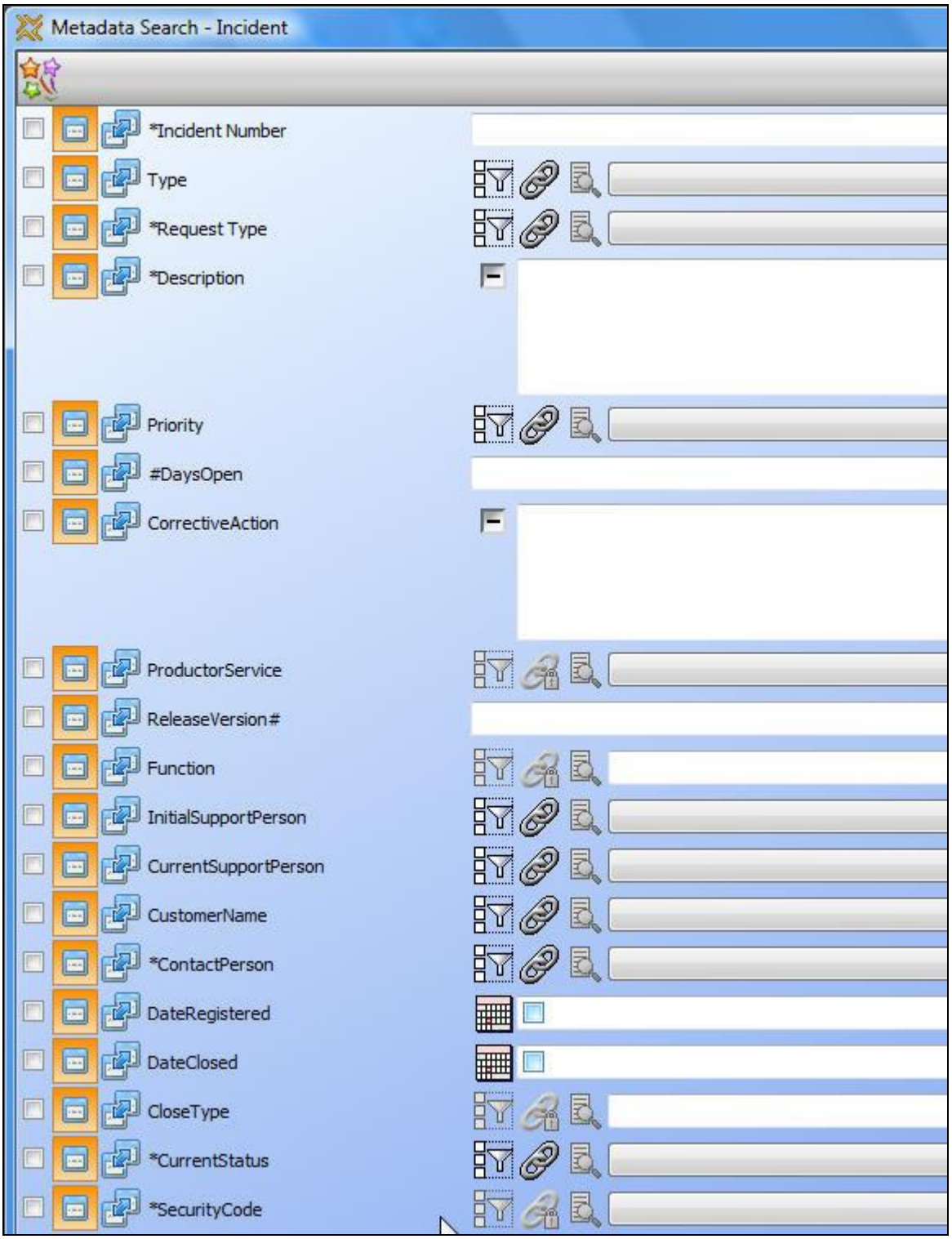
How do we search?

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.

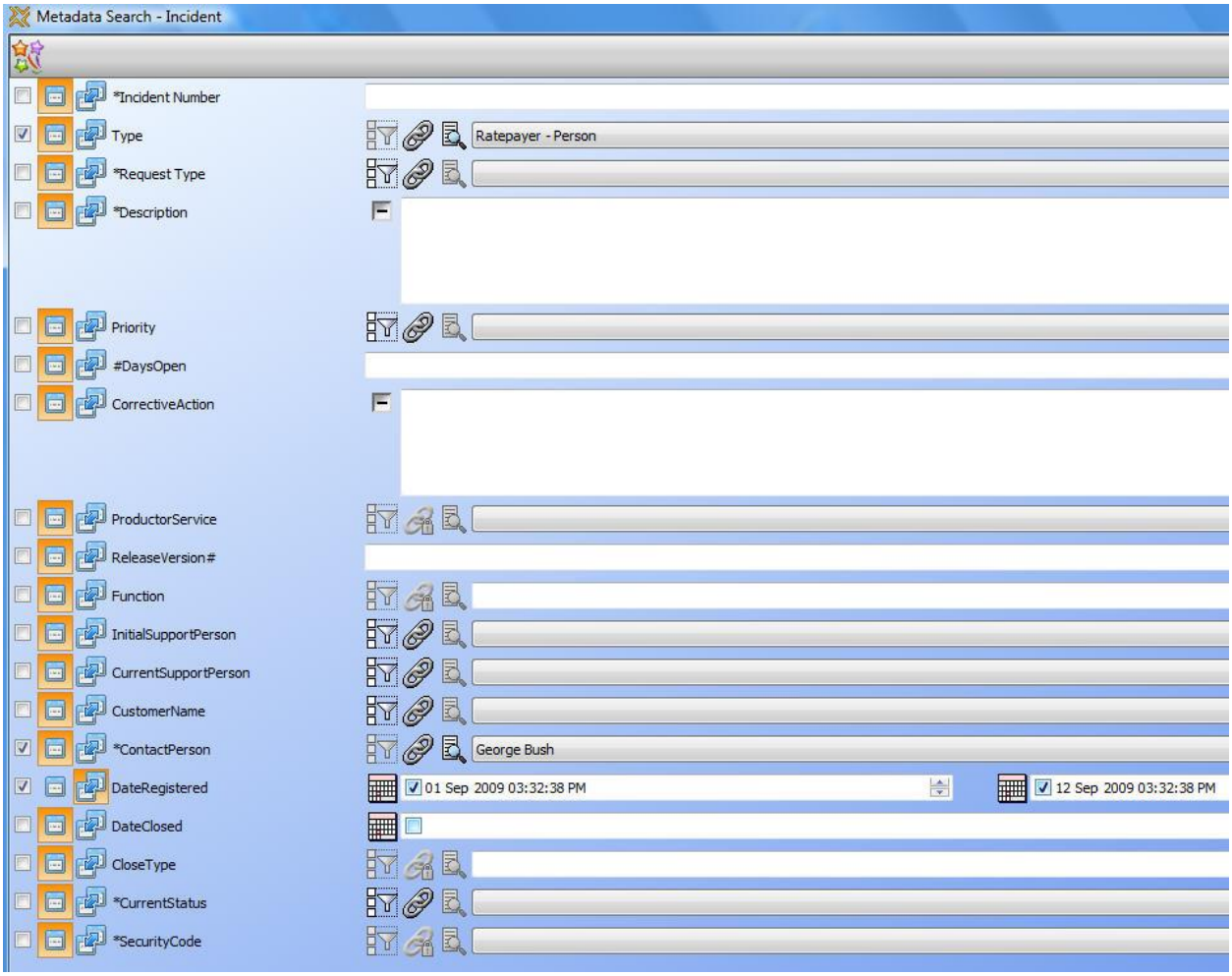


You will then see the following screen:

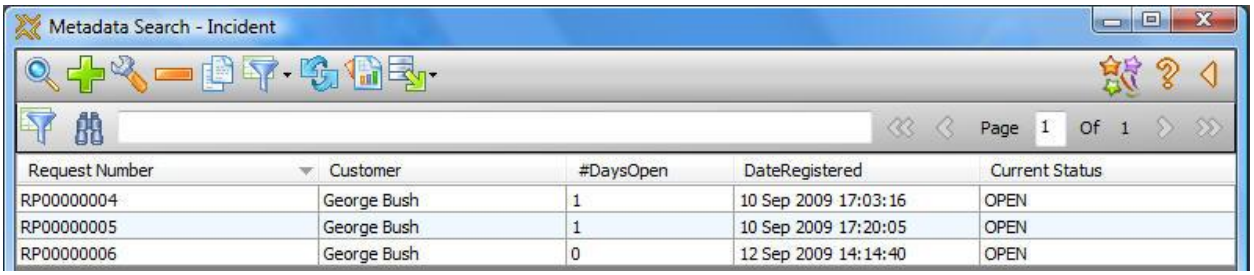


Note that you can use these icons to change a single value search to a range search. In the next example I will use this feature to search on a range of dates.

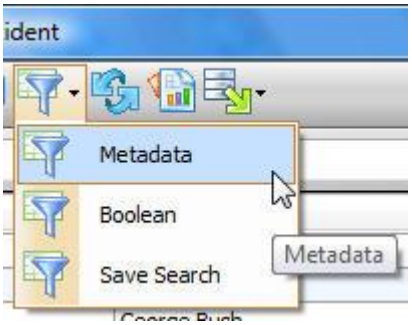
This is my search screen.



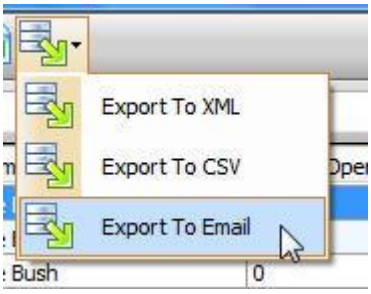
And this is my results screen:



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?

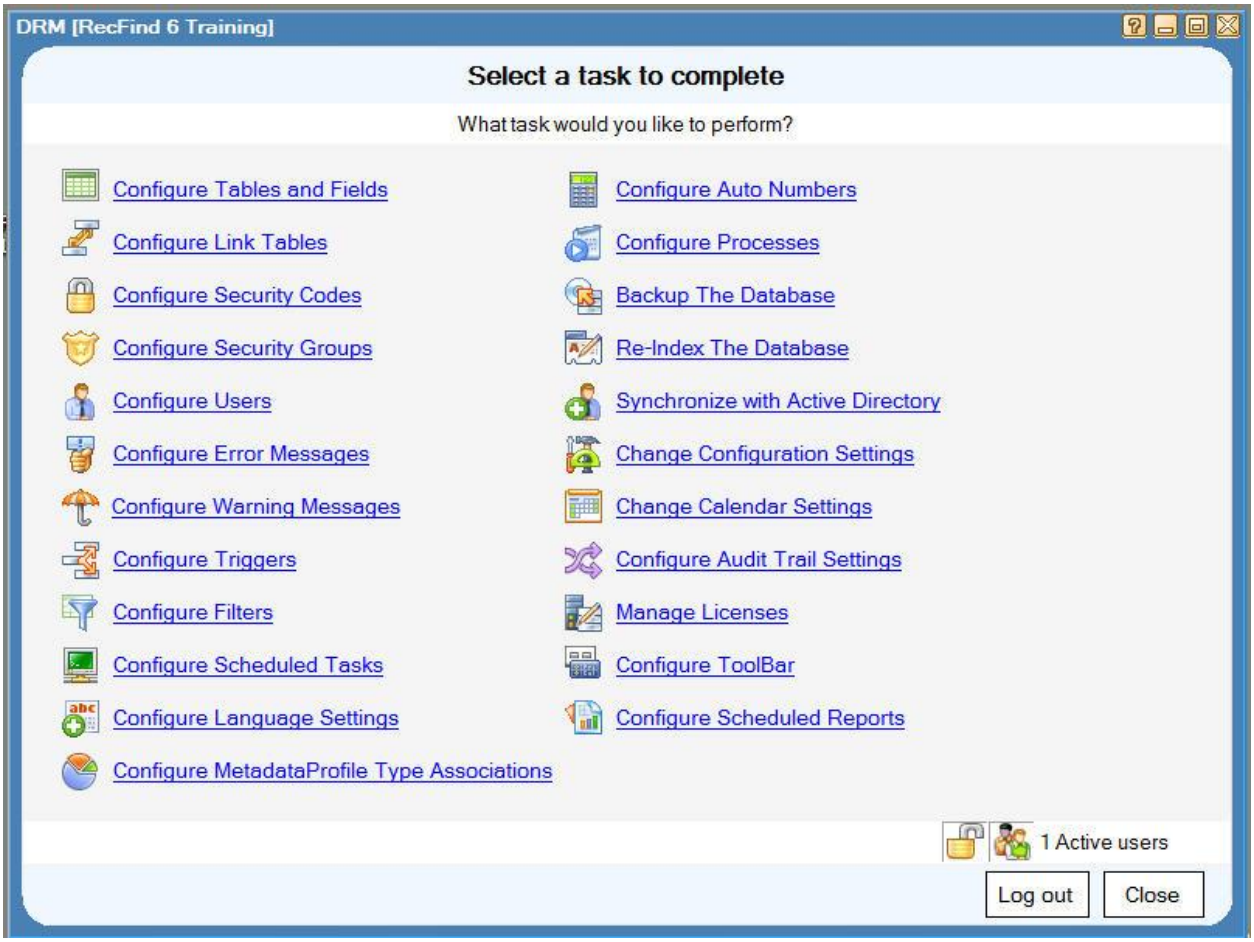
We click the report Method and we are presented with the standard report selection (RecFind 6 includes a powerful, fully featured report writer as well as standard reports).

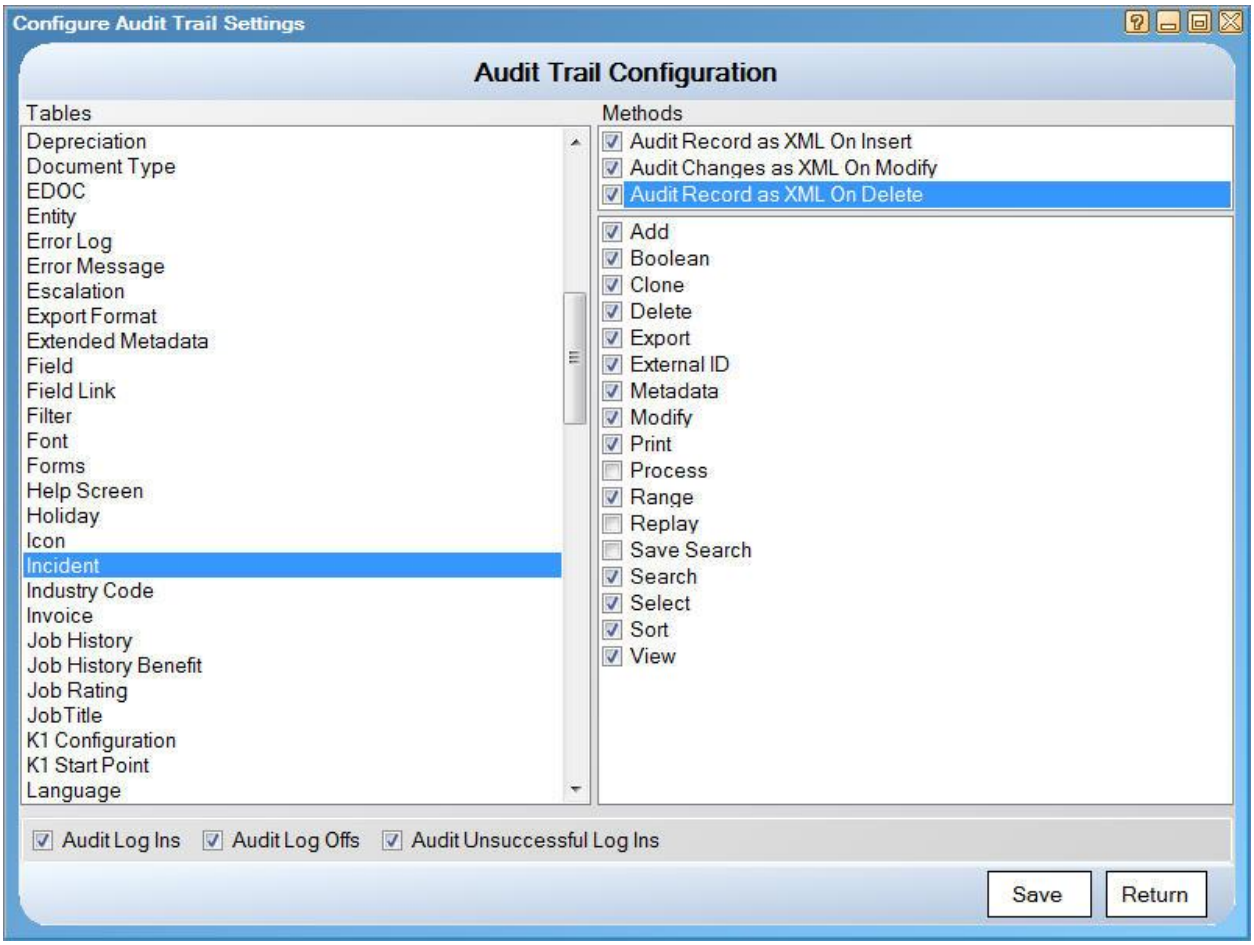
We can create (and then save for re-use) a brand new report, we can modify (and save for re-use) an existing report or we can just use one of the standard or already saved reports.

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:

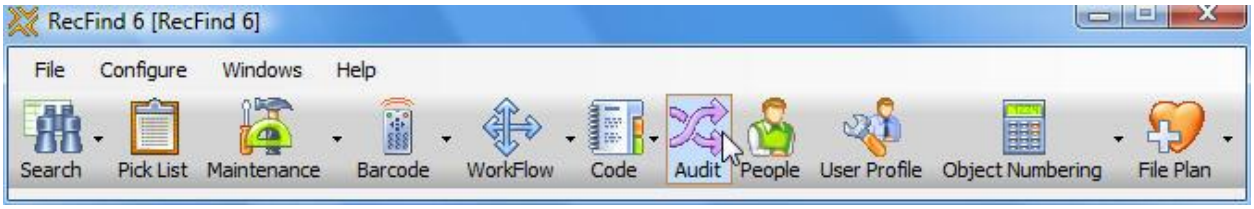

DRM [RecFind 6 Training]
Select a task to complete
What task would you like to perform?
Configure Tables and Fields
Configure Link Tables
Configure Security Codes
Configure Security Groups
Configure Users
Configure Error Messages
Configure Warning Messages
Configure Triggers
Configure Filters
Configure 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
Configure Scheduled Reports
1 Active users
Log out
Close

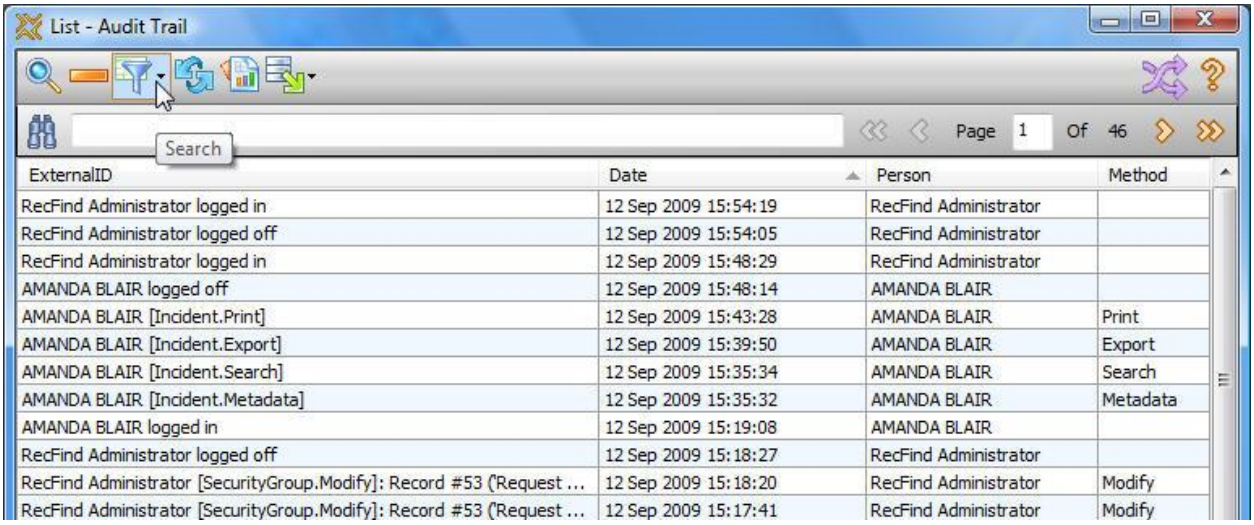


In the above example I have chosen to write an audit record every time one of the ticked transactions takes place. It is 100% configurable for every table in RecFind 6.

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.



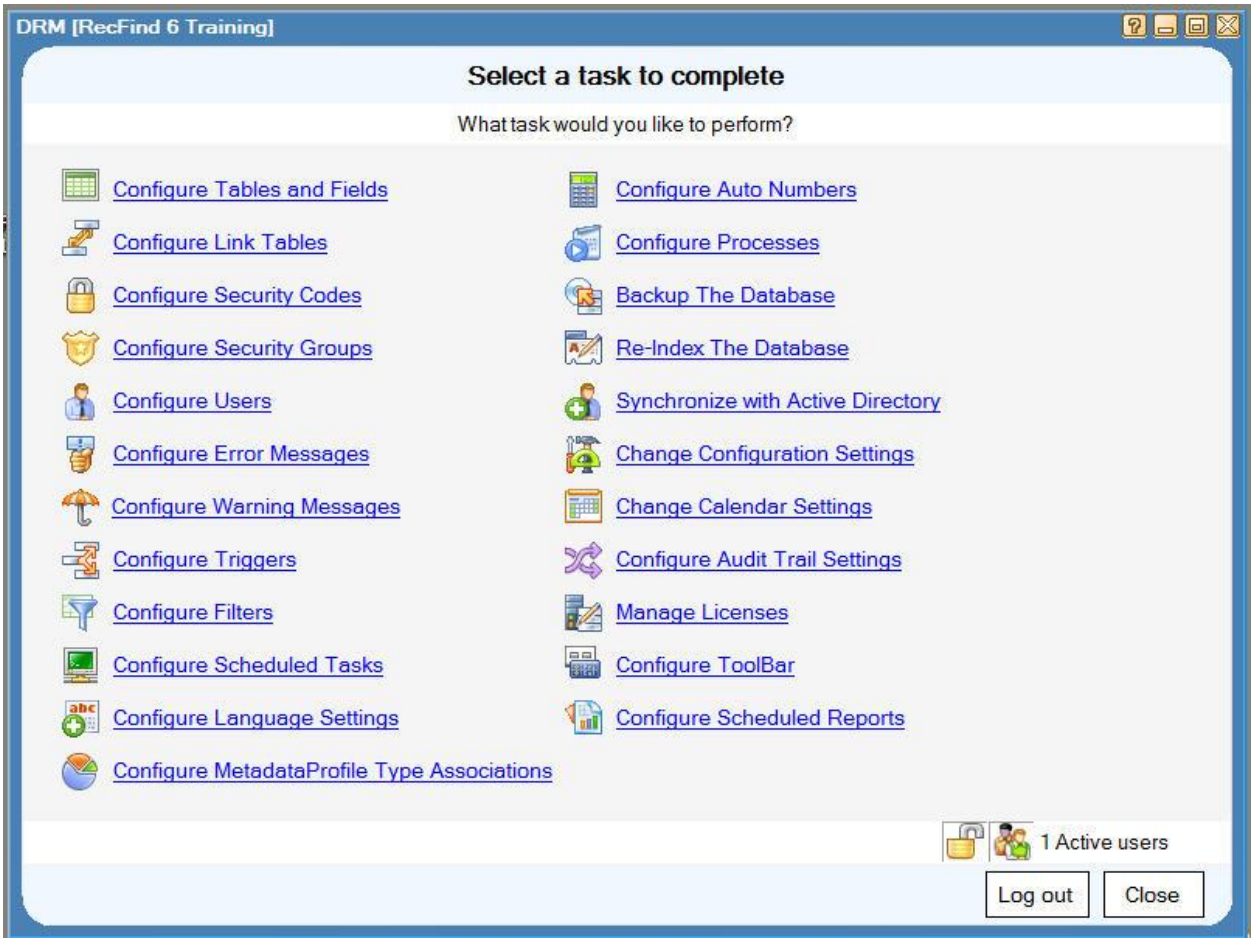

List - Audit Trail
Search
Page 1 Of 46
ExternalID
Date
Person
Method
RecFind Administrator logged in 12 Sep 2009 15:54:19 RecFind Administrator
RecFind Administrator logged off 12 Sep 2009 15:54:05 RecFind Administrator
RecFind Administrator logged in 12 Sep 2009 15:48:29 RecFind Administrator
AMANDA 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.

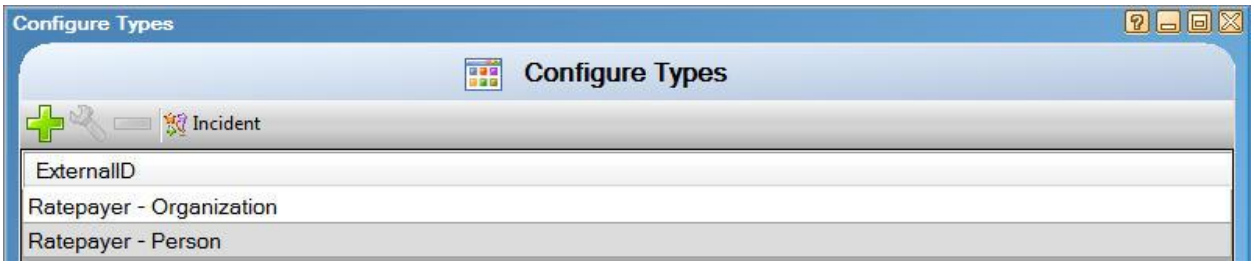
Log into the DRM



Select “Configure Tables and Fields”.

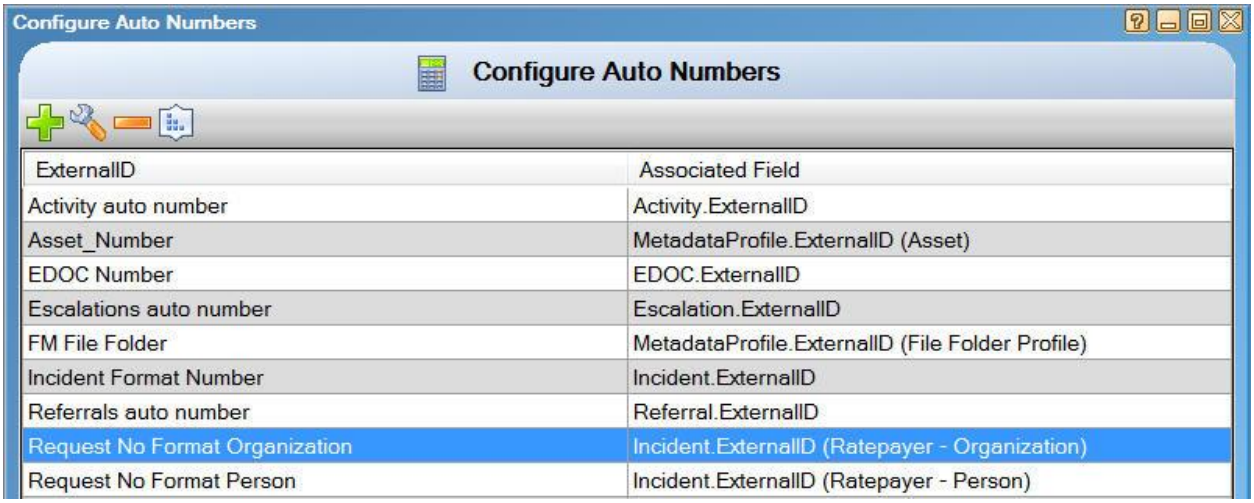
Select the Incident table, select ‘Modify’, make it type configurable if it is not already so.

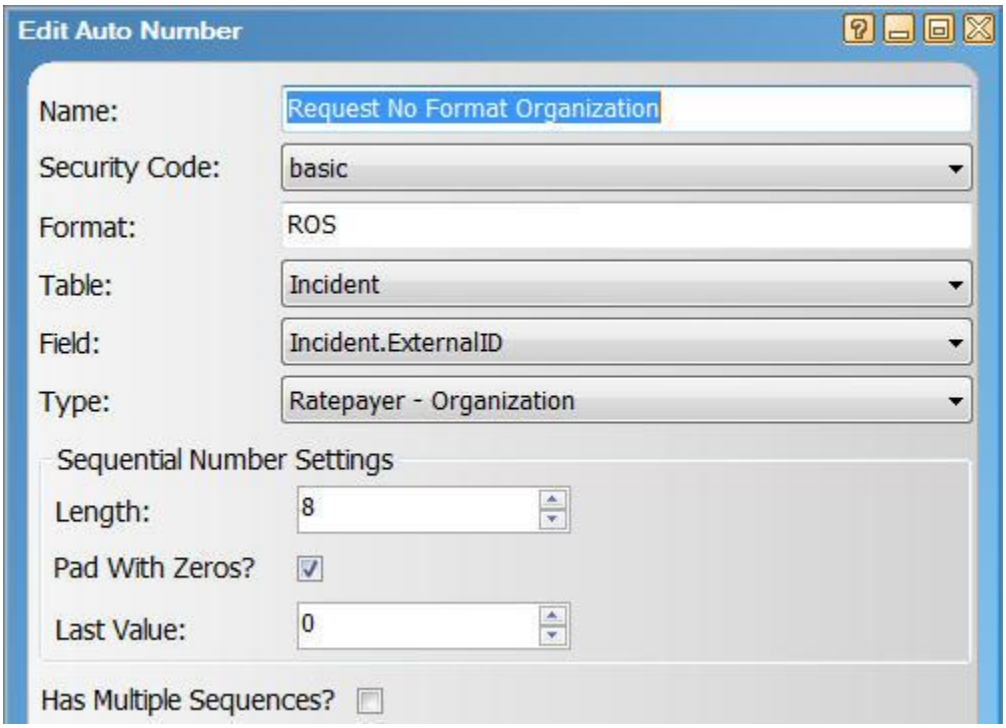
Select the Incident table, select ‘Types’, add your two new type codes, e.g.

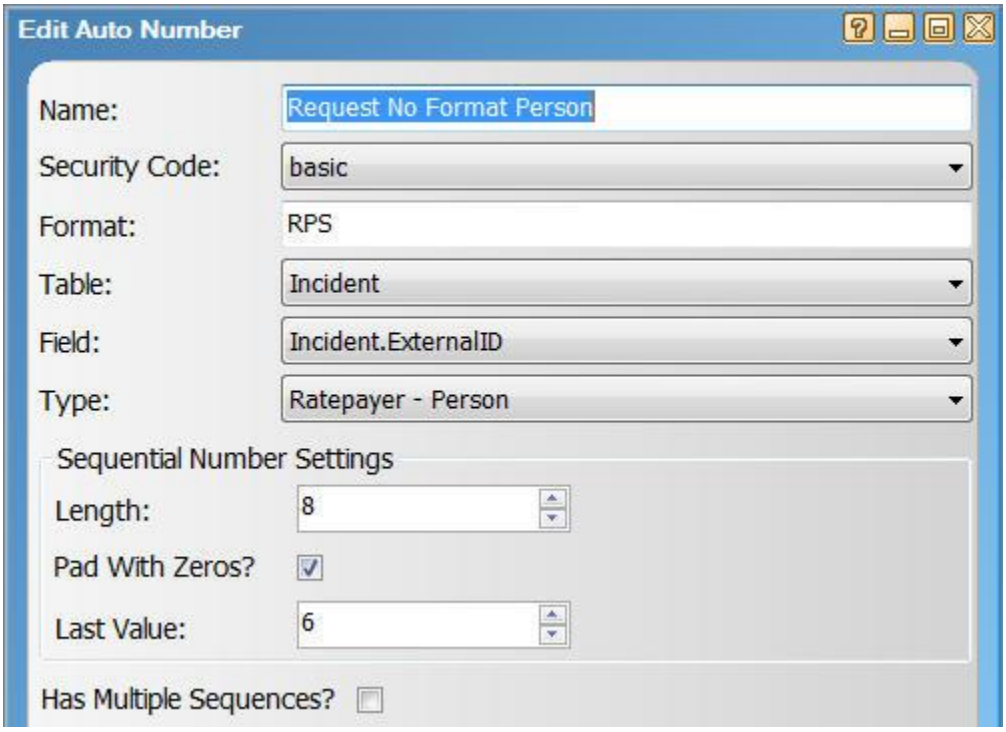


Select “Configure Auto Numbers”

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



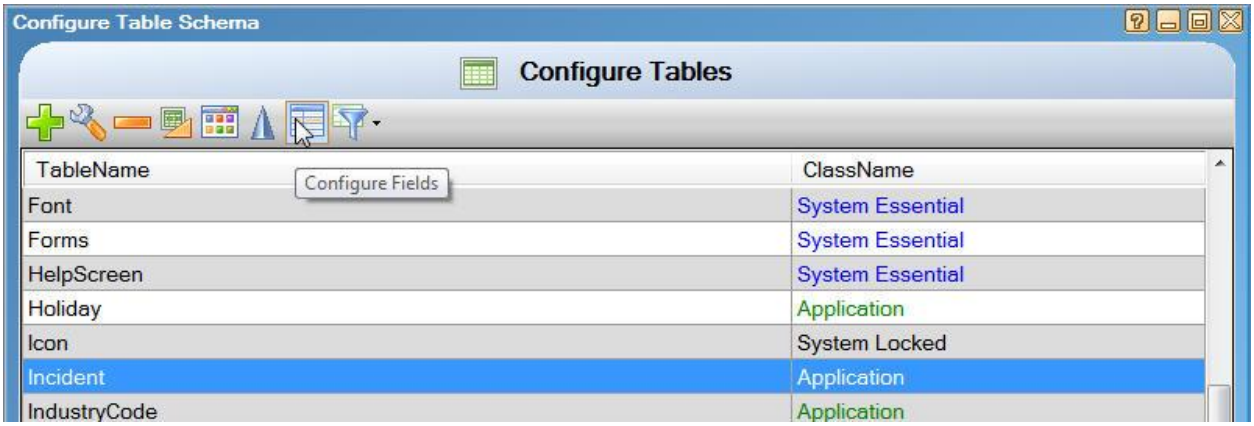




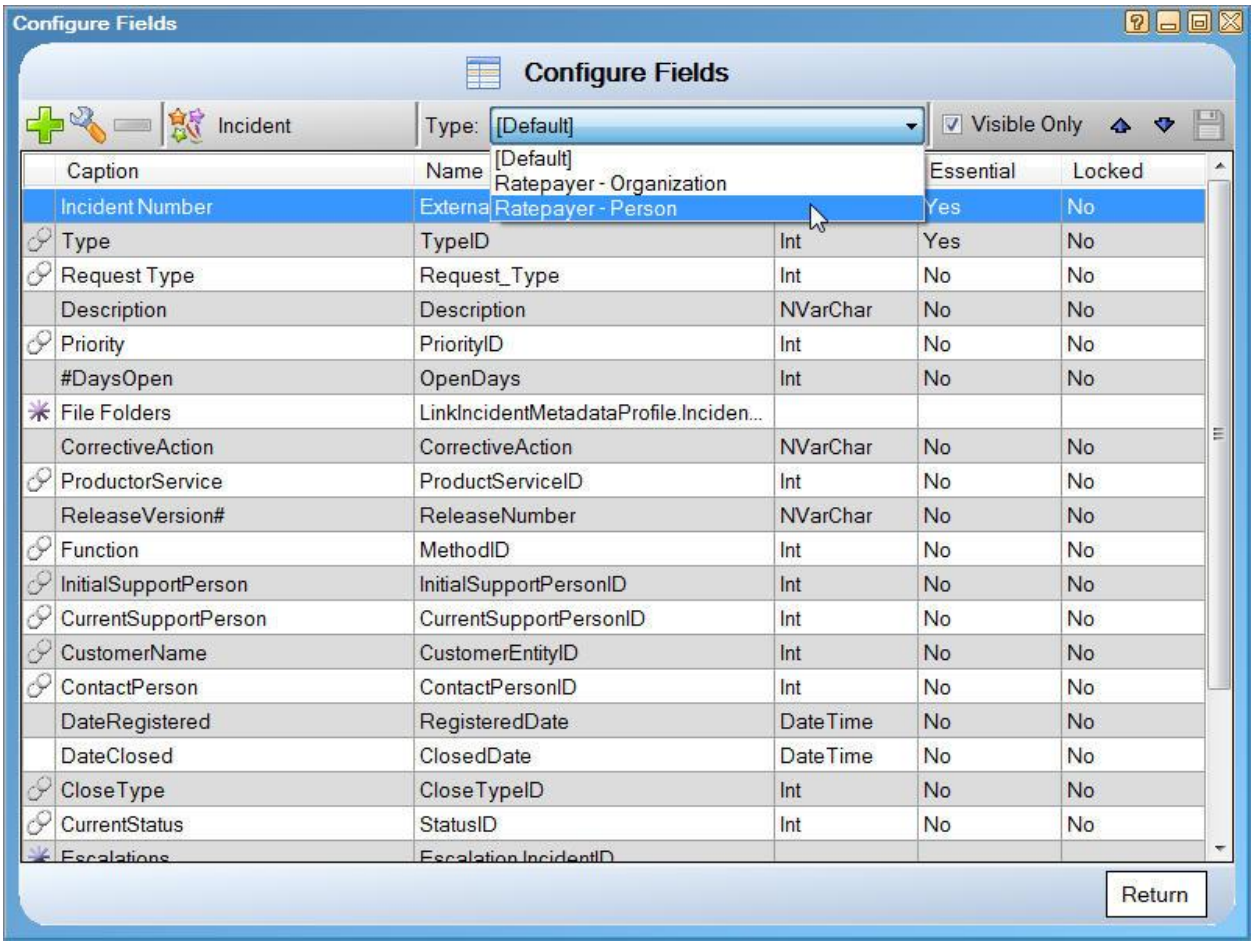
Select “Configure Tables and Fields”.

Select Incident table.

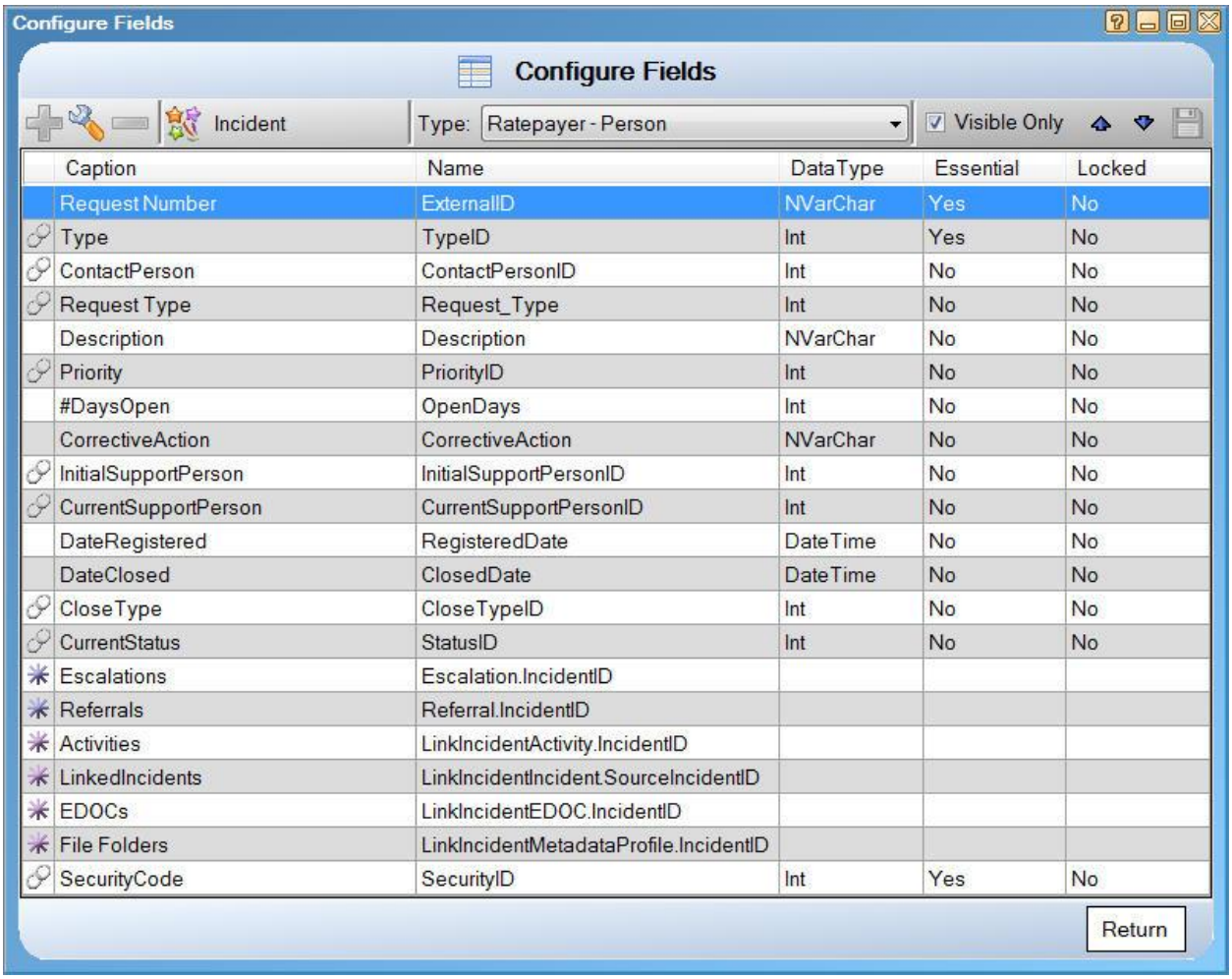
Select “Configure Fields”.

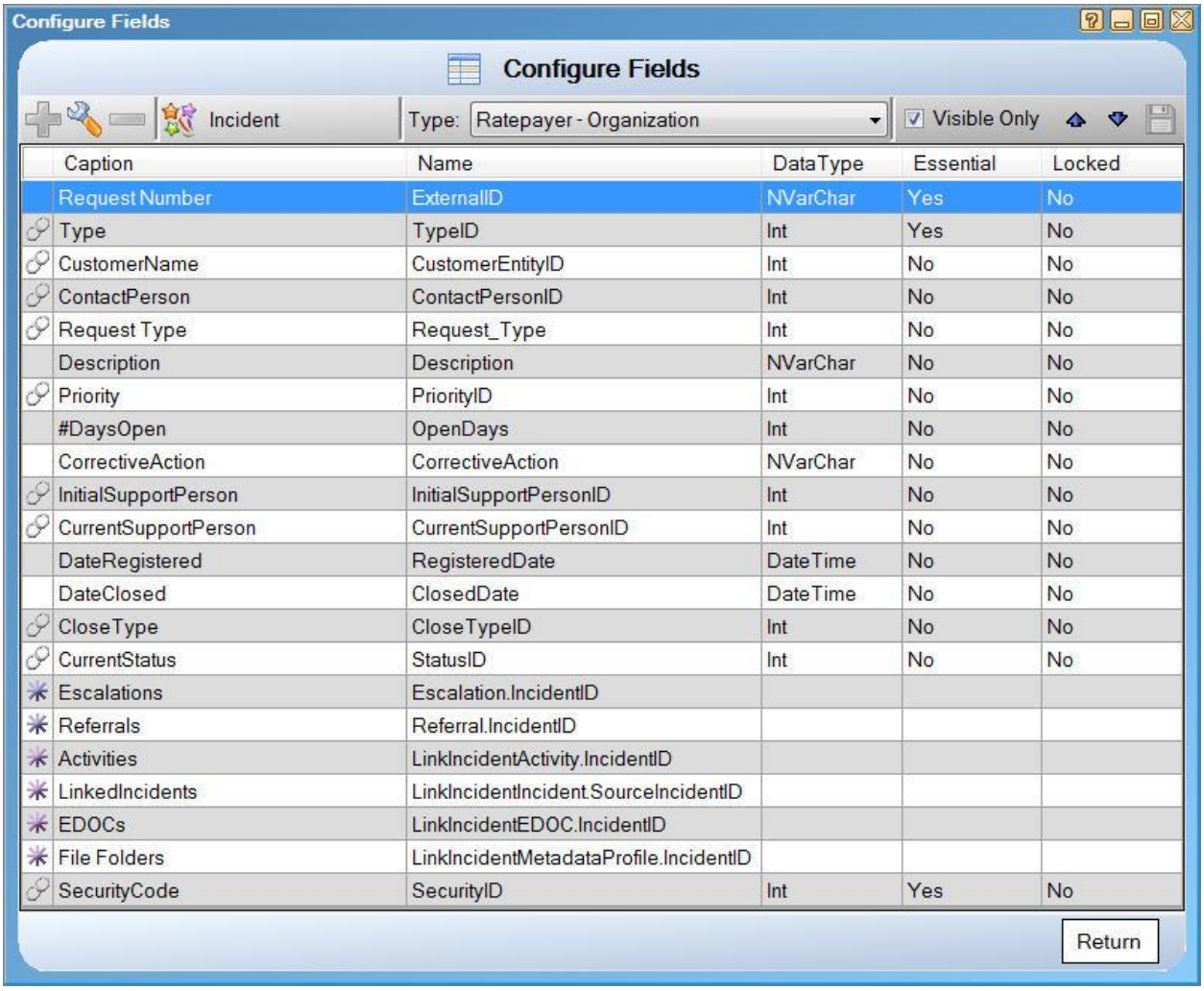


Select each type in turn and configure the fields and captions and default value as you require them.


Configure Fields
Configure Fields
Incident
Type: [Default]
[Default]
Ratepayer - Organization
Ratepayer - Person
Visible Only
Caption
Name
Essential
Locked
Incident Number
Externa
Yes
No
Type
TypeID
Int
Yes
No
Request Type
Request_Type
Int
No
No
Description
Description
NVarChar
No
No
Priority
PriorityID
Int
No
No
#DaysOpen
OpenDays
Int
No
No
File Folders
LinkIncidentMetadataProfile.Inciden...
CorrectiveAction
CorrectiveAction
NVarChar
No
No
ProductorService
ProductServiceID
Int
No
No
ReleaseVersion#
ReleaseNumber
NVarChar
No
No
Function
MethodID
Int
No
No
InitialSupportPerson
InitialSupportPersonID
Int
No
No
CurrentSupportPerson
CurrentSupportPersonID
Int
No
No
CustomerName
CustomerEntityID
Int
No
No
ContactPerson
ContactPersonID
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
Return

My examples below:

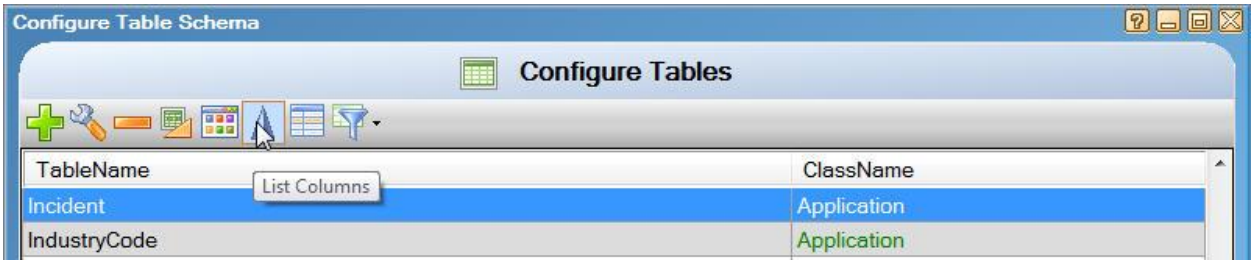




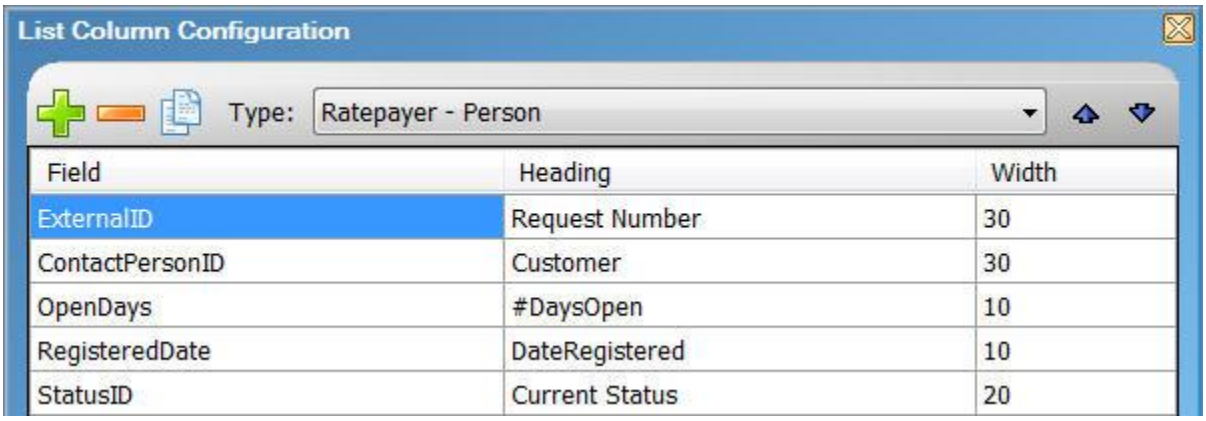
Note 1: – I am not assuming that you will understand all of this without first attending a training course. These processes also assume a certain knowledge of databases, data models and data types so most of you will require assistance from your IT support person when configuring tables in RecFind 6.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

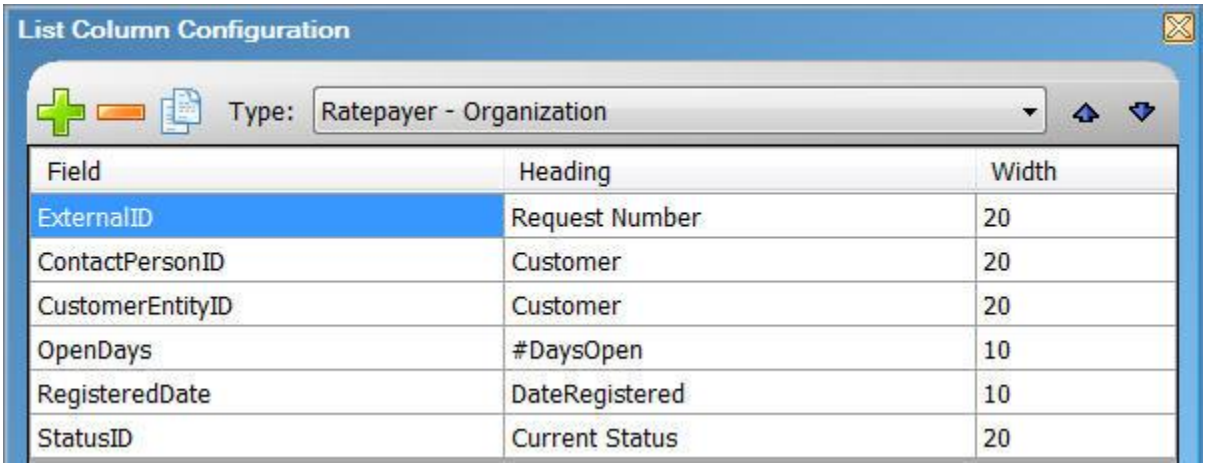
Note 2: - I have also not shown you all the detail changes I have made to the fields, tables and filters. This level of detail won't make much sense (and would only confuse you) until after you have done a training course.

Select the Incident table.



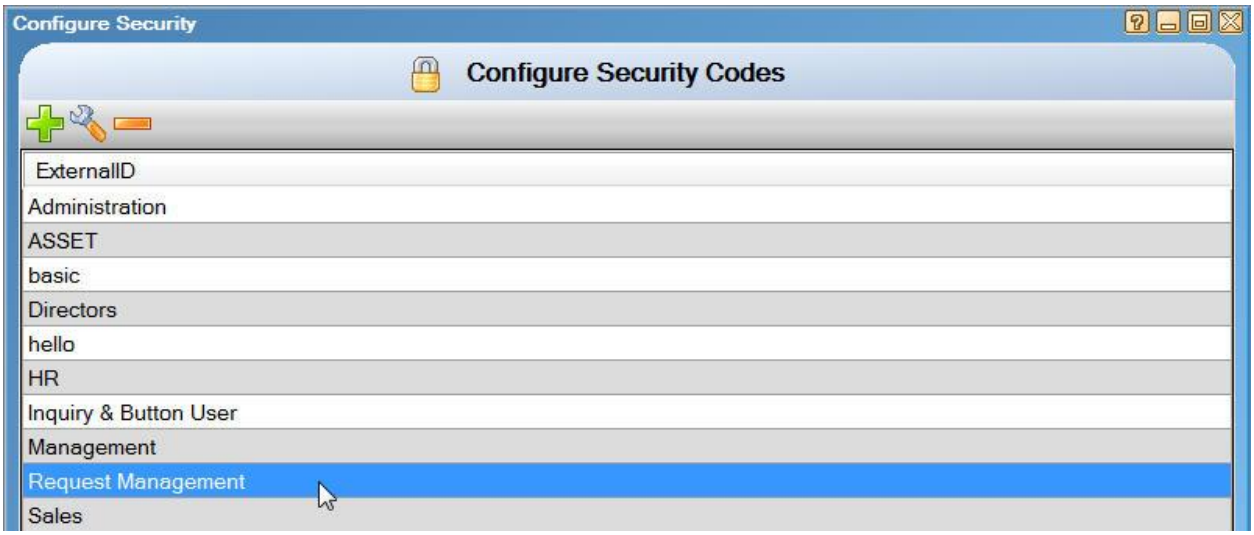
Now configure the columns and headings you want displayed with your data.





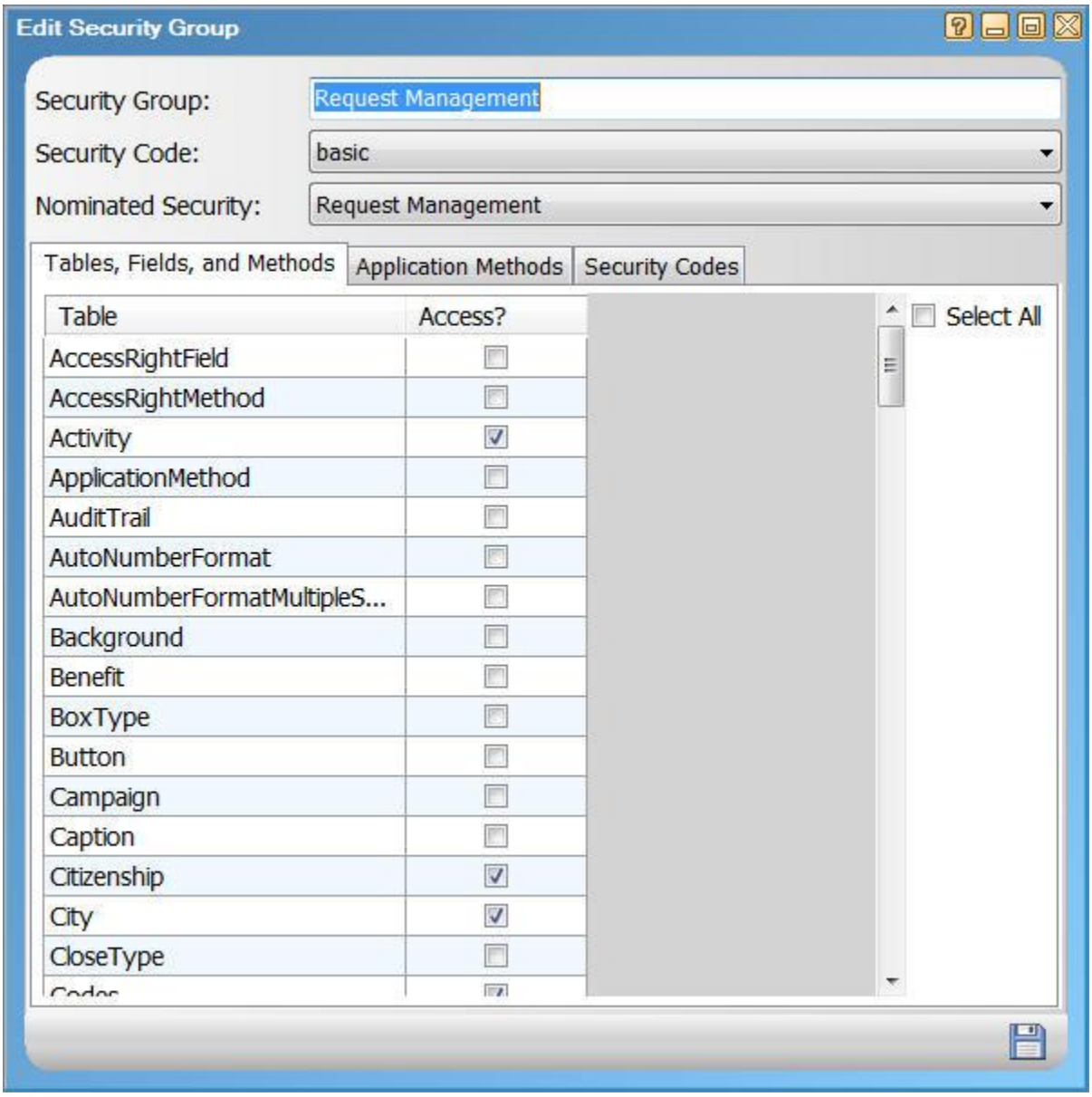
Select “Configure Security Codes”

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:

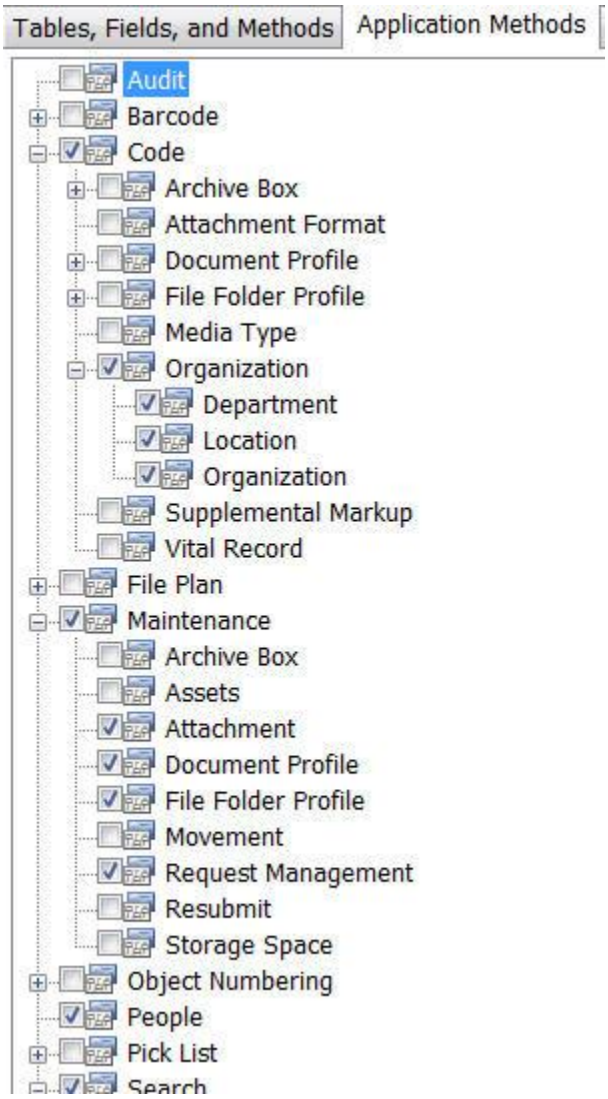
1. Activity
2. Citizenship
3. City
4. Codes
5. Country
6. DepartmentDivision
7. DocumentType

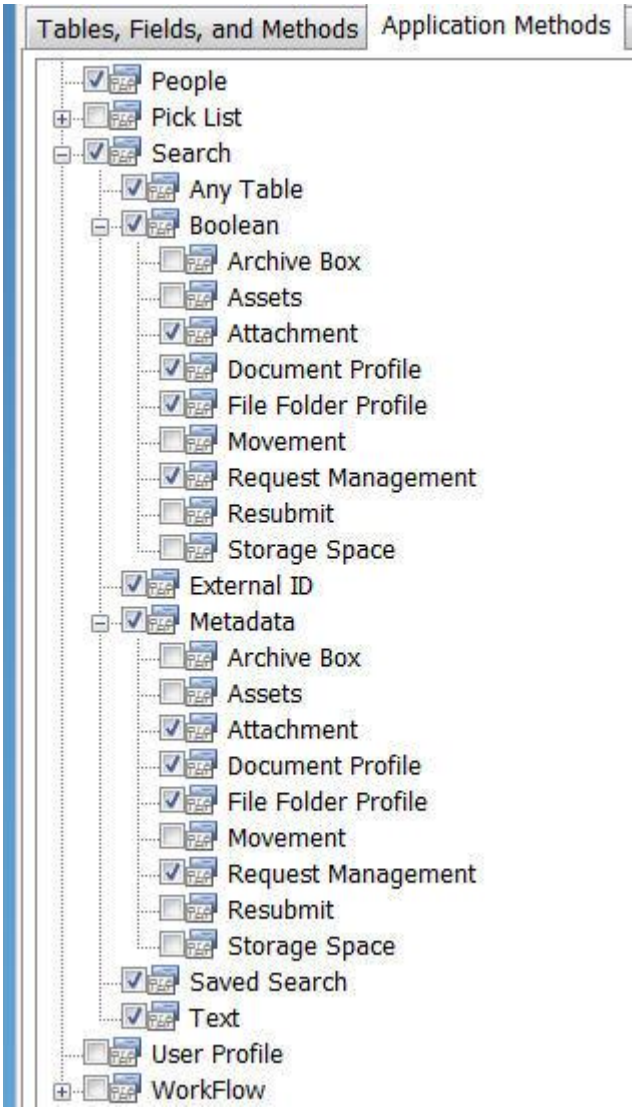
8. EDOC
9. Entity
10. Escalation
11. Incident
12. Location
13. MetadataProfile
14. Notes
15. Person
16. Priority
17. Reference
18. Referral
19. State
20. Type

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

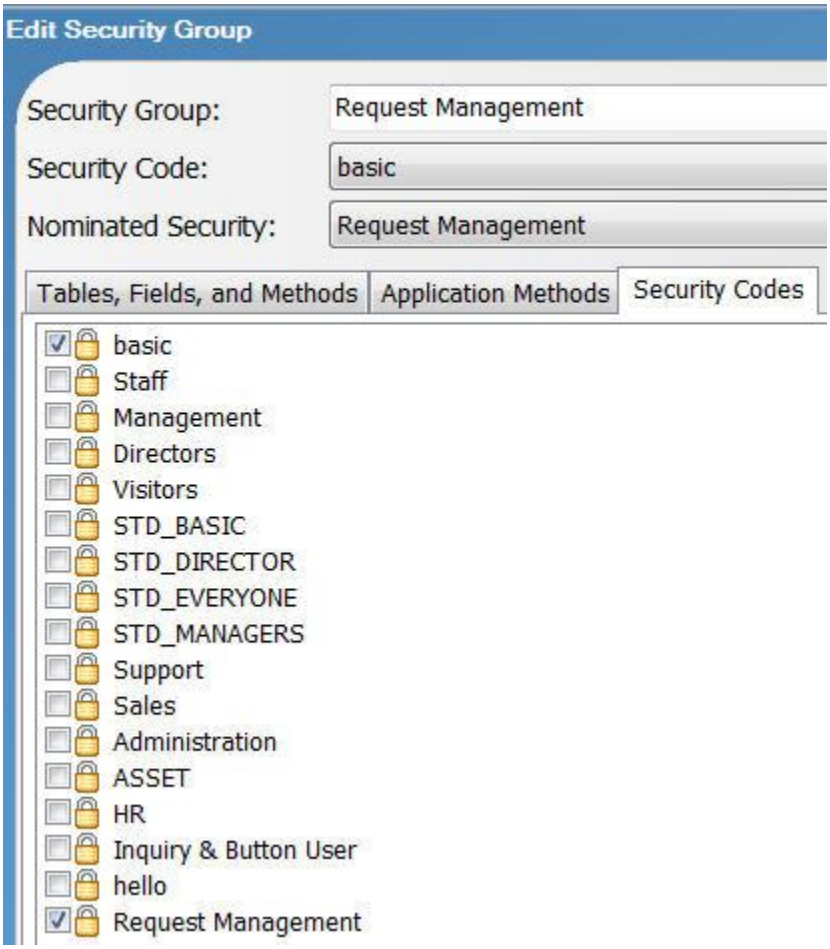
I didn't assign security to the fields in each table, I just accepted the defaults. You however, may want to think about what fields you want the users to be able to access in each of the tables I have selected.

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




Tables, Fields, and Methods
Application Methods
People
Pick List
Search
Any Table
Boolean
Archive Box
Assets
Attachment
Document Profile
File Folder Profile
Movement
Request Management
Resubmit
Storage Space
External ID
Metadata
Archive Box
Assets
Attachment
Document Profile
File Folder Profile
Movement
Request Management
Resubmit
Storage Space
Saved Search
Text
User Profile
WorkFlow

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.

Best Regards,

Frank McKenna, CEO