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Contact Centre Arena Training

Topic CC-4-1

Managing live contact records

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Version: 1-2

Date: 2013-12-19

1 Introduction

1.1 Executive Summary

This document is a training document to enable Managerial management processes on contact data.

Once a form has gone live and a number of records are now in the form, ongoing maintenance, accurate reporting and forward planning become a major concern of the System Champion. There are a number of approaches which can be adopted depending on the scenario you are in. This document outlines potential solution scenarios.

The document also contains some potential development options which could be employed in the future.

1.2 Key Project Variables

Status Summary:	Training
Primary Project Manager:	PL

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1.3 Contents

1 Introduction 2
1.1 Executive Summary 2
1.2 Key Project Variables 2
1.3 Contents 3
1.4 Acronyms and Abbreviations 5
1.4.1 All n One 5
1.4.2 Training Document 5
1.5 Key Stakeholders 6
1.5.1 All n One 6
1.6 Version History 7
2 Theory 8
2.1 Recommended prerequisite training 8
2.2 Standard training approach 9
2.3 Lexicon 10
2.3.1 Previously explained terms 10
2.3.2 Terms explained in this training 16
2.4 Situation Setup 17
2.5 Grouping and Flagging Records 19
3 Scenarios 22
3.1 Overview 22
3.2 Scenario 1: Working on subsets 23
3.2.1 Scenario 23
3.2.2 Discussion 23
3.2.3 Solutions 26
3.3 Scenario 2: Appending new records 27
3.3.1 Scenario 27
3.3.2 Discussion 27
3.3.3 Solutions 28
3.4 Scenario 3: Data archive / removal 29
3.4.1 Scenario 29

3.4.2 Discussion 29
3.4.3 Solutions 29
3.5 Scenario 4: Rules based changes 30
3.5.1 Scenario 30
3.5.2 Discussion 30
3.5.3 Solutions 31
4 Processes & Procedures 32
4.1 Flagging records using Smart Update 32
4.1.1 Overview 32
4.1.2 Extract the data 32
4.1.3 Modify the data 33
4.1.4 Process the updated data 33
4.1.5 Test the results 34
4.2 Creating a custom contact group 35
4.2.1 Overview 35
4.2.2 Advanced grouping options 35
4.2.3 Combining Groups 36
4.3 Restore records from custom contact groups 37
4.4 Copy a Form 37
4.5 Group update all records 38
4.6 Blind add records 39
4.7 Smart update records 39
4.8 Group update some records 40
4.9 Group delete some records 40
4.10 Export CDA and CCL compatible formatting 41
4.11 MetaData Programs 42
4.11.1 Overview 42
4.11.2 Structure of Processing 43
4.11.3 Types of Processing 43
4.12 Data Deletion for Data Protection Reasons 44

1.4 Acronyms and Abbreviations

1.4.1 All n One

BE	Business Express
BER8	Business Express Release 8
SER1	Service Enhancement Release 1

1.4.2 Training Document

CSV	Comma Separated Values
SLA	Service Level Agreement
SQL	Structured Query Language

1.5 Key Stakeholders

1.5.1 All n One

Initial	*Name*	*Company*	*Role*	*Email Address*
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1.6 Version History

Version	**1-2**
Date	2013-12-19
Author	Philip Lacey
Modifications	Addition of Learning Department theory and documentation.

Version	**1-1**
Date	2013-12-19
Author	Philip Lacey
Modifications	Transfer to an enumerated document

Version	**1-0**
Date	2013-12-19
Author	Philip Lacey
Modifications	Initial draft

2 Theory

2.1 Recommended prerequisite training

All Contact Centre Arena Level 1 training

CC-1-1	Introduction to BE
CC-1-2	Introduction to Contact Centres
CC-1-3	Introduction to Blended Form Structure
CC-1-4	Introduction to Contact Centre Reporting
CC-1-5	Introduction to Form Outcomes

Some Contact Centre Arena Level 2 training

CC-2-2	Data import management
CC-2-3	Outbound contact management
CC-2-4	Data Profiling - Custom reporting

Some Contact Centre Arena Level 3 training

CC-3-2	Form optimisations
CC-3-5	Project management and work list configurations

2.2 Standard training approach

This document is broken into four sections:

- Section 1 provides some document management
- Section 2 provides theory on the training area including a Lexicon.
- Section 3 provides scenarios and worked examples to highlight what is to be accomplished
- Section 4 provides instructional procedures associated with the scenarios

This training is appropriate to the level stated on the front cover of the document. This training forms part of the All n One Learning Departments curriculum for BE. This curriculum is available in the document "BE Learning Department vX-x" where X is the major version and x is the minor revision.

In this document a procedure is identified as [Procedure X] where X is the number of that procedure. The procedures can be found in Section 4 of the document or in the indicated document.

2.3 Lexicon

2.3.1 Previously explained terms

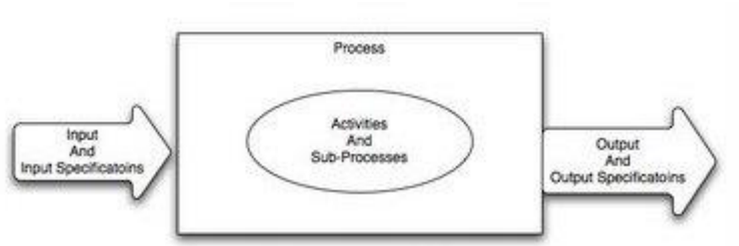
2.3.1.1 Conceptual Terms

Process Vs. Procedure Vs. Work Instructions

http://the9000store.com/iso-9000-tips-process-procedure-work-instruction.aspx

There are three terms often confused: Process, Procedure, and Work Instruction.

Process (Level 1 Documents)



Process - any activity or set of activities that uses resources to transform inputs into outputs can be considered a process. Processes must have defined (but not necessarily measurable) objective(s), input(s), output(s), activities, and resources. You should be able to ask these when defining a process:

- Activities — What are the basic jobs carried out in your department? (Can you explain to me your operations here?)
- Inputs/Resources — What information do you need to start your work? (Where does it come from?)
- Outputs — Who receives the result of your work? (How do you know if you've done your job correctly? (meet objectives))

Procedure (Level 2 Documents)

Procedure - A procedure outlines how to perform a process, such as "Purchasing":

Procedure Sample

- Who performs what action
- What sequence they perform the steps in the task
- The criteria (standard) they must meet

Your procedures (along with your ISO 9001 quality manual and required forms) make up your quality management system (QMS). Your procedures will describe how you operate and control your business and meet the ISO 9001 requirements.

Work Instructions (Level 3 Documents)

Work Instructions - A work instruction describes how to perform a task, which is a more detailed portion of the procedure such as "Completing a PO" or "Ordering supplies".

You may need more detail than that described in the procedures. Many businesses include work instructions to aid in training, to reduce mistakes, a point of reference for jobs, etc.

2.3.1.2 BE System Terms

BE Client is the term given to the organisation who has purchased an instance of BE.

System Champion is the nominated BE Client person or persons primarily responsible for the system management of BE and it's content.

User is an individual person who uses BE.

Team Lead is a person responsible for a number of users and their associated processes, procedures and reporting but is not a System Champion. Their functional and content access is usually limited.

Universal Date Time Format is a layout for specifying a date that used by BE and systems globally. Dates are represented as yyyy-mm-dd hh:mm:ss.
1:30pm on the 19th of December 2013 would be displayed as 2013-12-19 13:30:00

Notepad Vs. Notepad++. Notepad is a simple text editing tool which is external to BE but is very useful for numerous support tasks. Notepad is a installed by default with all Microsoft Windows operating systems. The tool is limited. There is a free enhanced version of Notepad available from http://notepad-plus-plus.org/
TextWrangler is a Mac alternative.

Data Protection Compliance is a national law unique to each country which specifies what information and for how long it may be stored. In Ireland the Data Protection Commissioner manages the laws and rules for Irish companies. http://www.dataprotection.ie

2.3.1.3 BE Form Terms

Form is a custom BE data structure made up of five tables used to store data.

Campaign a series of operations intended to achieve a goal, confined to a particular area, or involving a specified type of work. BE Forms facilitate operation, management and reporting of the work done in a campaign.

Field is a single data storage container used to store information of a common type. E.g. a first name field will all contain first names. This is synonymous to a column in an Excel spreadsheet.

Script the sequential delivery of the fields in a form in such a way as to be read or delivery as a conversation flow over the phone.

Record is a single collection of fields. This is synonymous to a row of data in an Excel spreadsheet.

ID is the unique identifier of the record.

Outcome is a functional term given to how the interaction with a record finishes. A BE outcome can also perform a number of associated work items. The term is synonymous with “Disposition Code” but can perform numerous tasks.

Status is the last outcome used with that record.

Number of Attempts is the total number of outcomes / contacts used on that record.

Contact Group is a collection of records identified by using their Status and Number of Attempts.

Custom Contact Group is a user defined collection of records to be contacted. Their Status and Number of Attempts are custom reset to identify the group and remove them from their default contact group.

CDA the BE technical term for a data record. Contact DAta.

CCL the BE technical term for a contact record which must be associated with a CDA record. Contact CaLl.

Contact History is an in-system listing all of the CCLs associated with the CDA.

2.3.1.4 BE Operational Terms

Importing or **Loading** is the general term given to mass adding records to the system from an external data file.

Working Queue is used in queue management as a way of sequentially delivering records to a user.

Record Status Grid is the display report which enables the selection of items for inclusion of grouped records on the working queue.

Rule is a set of criteria for identifying a group of records within a form.

2.3.1.5 BE Reporting Terms

Reporting Types. BE has four primary reporting types. Data, Statistics, Scoring and Visualisation reports.

Field Mapping is the method by which fields in a form can have a custom name applied to allow data to be more easily imported and to make column names in exported Data reports more meaningful.

Blind Add is the procedure of importing records to a form without performing and matching or look ups on existing records.

Smart Update is the procedure of importing records to a form which performs a lookup to match an existing record. If no match is found the record is added as a new record.

Snapshot is a report who's content will not change, when the data in BE does change. BE reporting is live. Snapshot reports are not live. For example when a data report is generated into an Excel spreadsheet, that spreadsheet when saved to the user's computer would be considered a snapshot report.

Spreadsheet is a computer program in which data, arranged in the rows and columns of a grid, can be manipulated and used in calculations.

CSV format is data file format, in which the contents of fields are separated by commas. Excel will display the contents of a CSV in its custom grid format. Notepad or Notepad++ will display the contents as comma separated data.

2.3.2 Terms explained in this training

Flag is specific data within a field used for the purposes of identifying a group of records.

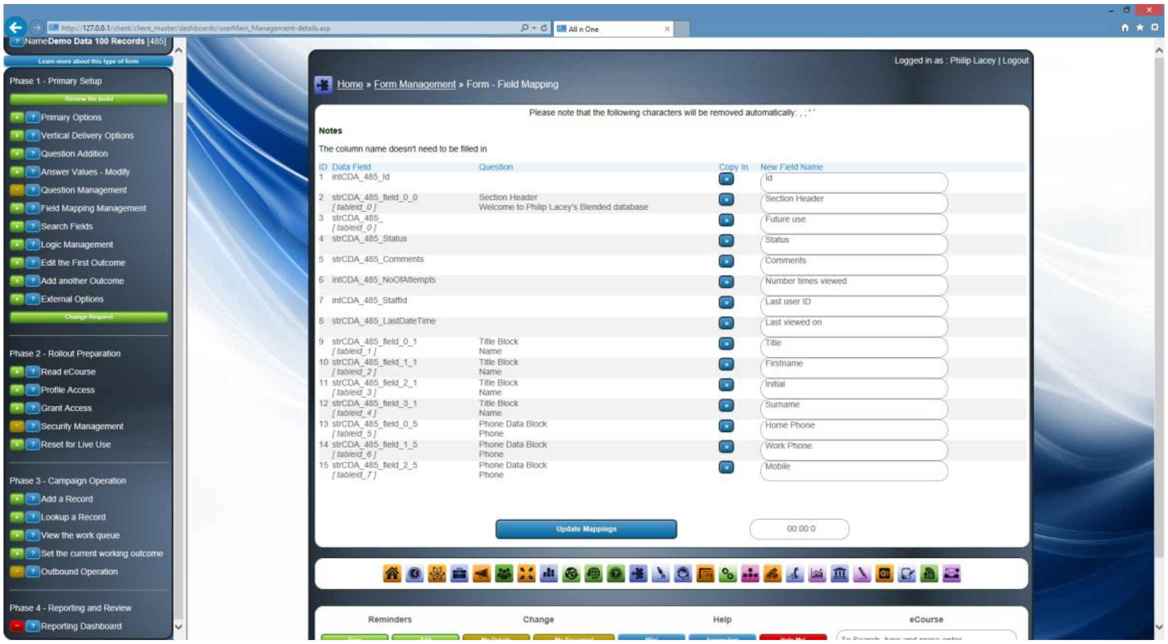
Park is place a record in a group for the purposes of not deleting the record but removing it from active contact groups.

Metadata is a set of data that describes and gives information about other data. The **MetaData** module has numerous data processing abilities including performing operations on existing data or appending in new metadata where required.

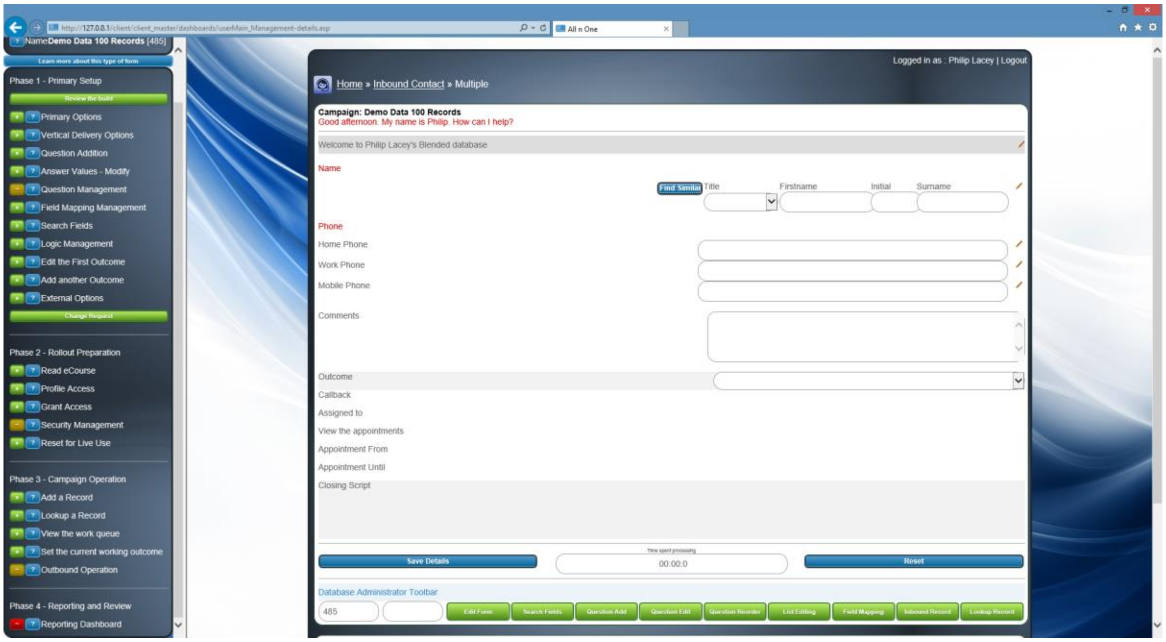
MetaData Program, MetaData Sequence and **MetaData Rules** are all explored in 4.11 of this document.

2.4 Situation Setup

A form is built. We will start with a simple form for demo purposes. The form has the following fields.



Giving a script of



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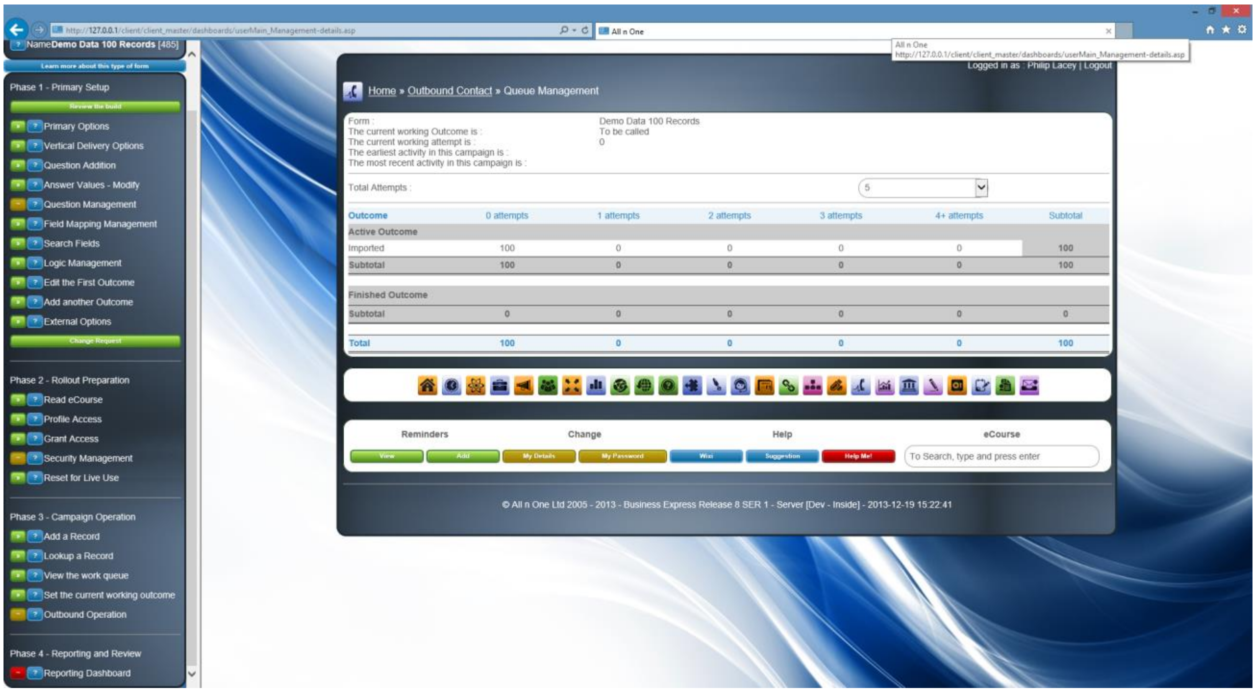
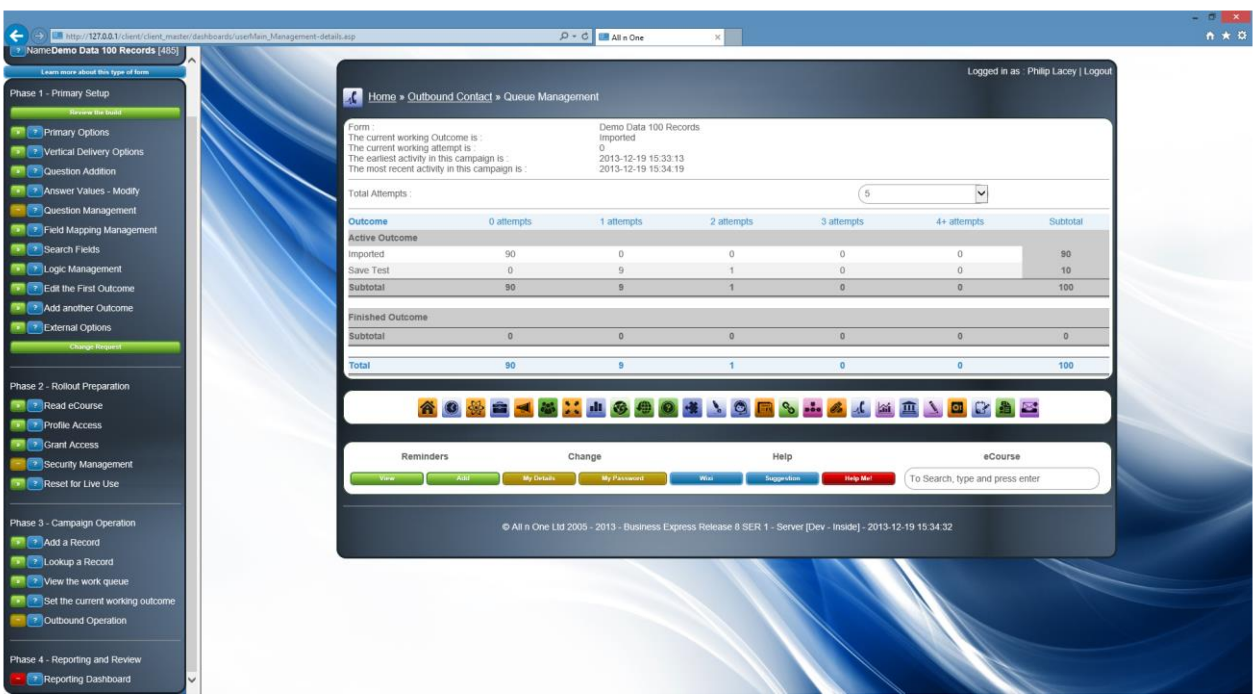
Into this we import 100 records



We then begin work and process 12 records



2.5 Grouping and Flagging Records

The biggest challenge in managing the records is finding a way of grouping records. Grouping records is a fairly straight forward procedure once there is some criteria which allows them to identified. When the group is identified then for convenience adding a flag is very useful. The flag makes it very easy to work with this group. BE allows the adding of numerous fields, so adding in a new field just for the purpose of flagging is very effective. Then you can use this field in a number of ways.

If we add a field called "Flag 1". You can then put custom content in there such as "Group 1", "Group 2" etc. You can use any combination of words and letters in the field.

You can also have multiple flag fields, to allow the record exist in multiple groups.

Sample Data

ID	Firstname	Surname	Work Phone	Flag 1	Flag 2
1	Joe	Bloggs1	4294001	Group 1	Area 3
2	Joe	Bloggs2	4294002	Group 1	Area 3
3	Joe	Bloggs3	4294003	Group 1	Area 3
4	Joe	Bloggs4	4294004	Group 3	Area 3
5	Joe	Bloggs5	4294005	Group 2	Area 3
6	Joe	Bloggs6	4294006	Group 2	Area 1
7	Joe	Bloggs7	4294007	Group 2	Area 3
8	Joe	Bloggs8	4294008	Group 1	Area 2
9	Joe	Bloggs9	4294009	Group 3	Area 2
10	Joe	Bloggs10	4294010	Group 3	Area 2
11	Joe	Bloggs11	4294011	Group 3	Area 1
12	Joe	Bloggs12	4294012	Group 3	Area 1

Working with those flag fields we can see the data as

ID	Firstname	Surname	Work Phone	Flag 1	Flag 2
1	Joe	Bloggs1	4294001	Group 1	Area 3
2	Joe	Bloggs2	4294002	Group 1	Area 3
3	Joe	Bloggs3	4294003	Group 1	Area 3
4	Joe	Bloggs4	4294004	Group 3	Area 3
5	Joe	Bloggs5	4294005	Group 2	Area 3
6	Joe	Bloggs6	4294006	Group 2	Area 1
7	Joe	Bloggs7	4294007	Group 2	Area 3
8	Joe	Bloggs8	4294008	Group 1	Area 2
9	Joe	Bloggs9	4294009	Group 3	Area 2
10	Joe	Bloggs10	4294010	Group 3	Area 2
11	Joe	Bloggs11	4294011	Group 3	Area 1
12	Joe	Bloggs12	4294012	Group 3	Area 1

Or

ID	Firstname	Surname	Work Phone	Flag 1	Flag 2
1	Joe	Bloggs1	4294001	Group 1	Area 3
2	Joe	Bloggs2	4294002	Group 1	Area 3
3	Joe	Bloggs3	4294003	Group 1	Area 3
4	Joe	Bloggs4	4294004	Group 3	Area 3
5	Joe	Bloggs5	4294005	Group 2	Area 3
6	Joe	Bloggs6	4294006	Group 2	Area 1
7	Joe	Bloggs7	4294007	Group 2	Area 3
8	Joe	Bloggs8	4294008	Group 1	Area 2
9	Joe	Bloggs9	4294009	Group 3	Area 2
10	Joe	Bloggs10	4294010	Group 3	Area 2
11	Joe	Bloggs11	4294011	Group 3	Area 1
12	Joe	Bloggs12	4294012	Group 3	Area 1

Getting the data into the flag field is the challenge. There are a number of ways of doing this.

1. As the records are added into the form, the value is set manually or through custom JavaScript.
2. Smart update records [Procedure 4.7]
3. Metadata program updates [Procedure 4.11]
4. All n One support development

3 Scenarios

3.1 Overview

As with all of the scenarios list below, the primary consideration is reporting. How you report and the operational mechanisms set up to generate your reporting will best direct the approach you use. There are no right and wrong answers, there is simply selecting the answer that is most appropriate to your operational requirements.

3.2 Scenario 1: Working on subsets

3.2.1 Scenario

I want to isolate a group of records to work on.

3.2.2 Discussion

Isolating a group of records is easy when there is something to clearly group the records by. The biggest challenge is flagging the records first. Once the flag is identified creating the group is a procedure.

The engine in BE works as follows. To give out a record, the engine works on two fields. The strCDA_X_Status field and the intCDA_X_NoOfAttempts field. You decide to work on "Imported" records that haven't been contacted before, i.e. 0 attempts.

Looking at our dataset

ID	Firstname	Surname	Work Phone	Flag 1	Flag 2	Status	NoOfAttempts
1	Joe	Bloggs1	4294001	Group 1	Area 3	Imported	0
2	Joe	Bloggs2	4294002	Group 1	Area 3	Imported	0
3	Joe	Bloggs3	4294003	Group 1	Area 3	Imported	0
4	Joe	Bloggs4	4294004	Group 3	Area 3	Imported	0

When someone takes the record, the system will change the status and attempts of the record, to remove it from the working queue. The data becomes

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ID	Firstname	Surname	Work Phone	Flag 1	Flag 2	Status	NoOfAttempts
1	Joe	Bloggs1	4294001	Group 1	Area 3	Taken to process	1
2	Joe	Bloggs2	4294002	Group 1	Area 3	Imported	0
3	Joe	Bloggs3	4294003	Group 1	Area 3	Imported	0
4	Joe	Bloggs4	4294004	Group 3	Area 3	Imported	0

In this way if another user takes another record, they will not get the one that has already been given out. When the record is saved, the outcome is updated to the outcome chosen from the drop down list at the end of the script.

ID	Firstname	Surname	Work Phone	Flag 1	Flag 2	Status	NoOfAttempts
1	Joe	Bloggs1	4294001	Group 1	Area 3	Sale	1
2	Joe	Bloggs2	4294002	Group 1	Area 3	Imported	0
3	Joe	Bloggs3	4294003	Group 1	Area 3	Imported	0
4	Joe	Bloggs4	4294004	Group 3	Area 3	Imported	0

After a bit of work, the data may appear as follows

ID	Firstname	Surname	Work Phone	Flag 1	Flag 2	Status	NoOfAttempts
1	Joe	Bloggs1	4294001	Group 1	Area 3	Sale	1
2	Joe	Bloggs2	4294002	Group 1	Area 3	Not Interested	3
3	Joe	Bloggs3	4294003	Group 1	Area 3	Not Interested	3
4	Joe	Bloggs4	4294004	Group 3	Area 3	Callback later	2

This will create a "Record Status" grid as follows.

	0	1	2	3	4+
Sale	0	1	0	0	0
Not Interested	0	0	0	2	0
Callback later	0	0	1	0	0

When a custom group is created using the system, the Status is changed to whatever title is entered and the number of attempts is reset to 0. So for example we want to create a custom group of the "Not Interested" and "Callback" later types. We update the records into a custom contact group, the data becomes

ID	Firstname	Surname	Work Phone	Flag 1	Flag 2	Status	NoOfAttempts
1	Joe	Bloggs1	4294001	Group 1	Area 3	Sale	1
2	Joe	Bloggs2	4294002	Group 1	Area 3	Custom Title	0
3	Joe	Bloggs3	4294003	Group 1	Area 3	Custom Title	0
4	Joe	Bloggs4	4294004	Group 3	Area 3	Custom Title	0

The "Record Status" grid will appear as follows

	0	1	2	3	4+
Sale	0	1	0	0	0
Custom Title	3	0	0	0	0

As the records have new outcomes used, the number of contacts will be recalculated and the records move back to their positions. So if all the records were no answer the data would go back to

ID	Firstname	Surname	Work Phone	Flag 1	Flag 2	Status	NoOfAttempts
1	Joe	Bloggs1	4294001	Group 1	Area 3	Sale	1
2	Joe	Bloggs2	4294002	Group 1	Area 3	No Answer	4
3	Joe	Bloggs3	4294003	Group 1	Area 3	No Answer	4
4	Joe	Bloggs4	4294004	Group 3	Area 3	No Answer	3

However as the choice of which record to operate on is selected by the System Champion or team lead, then custom contact groups can be used easily queued as required.

Is also possible to easily restore all records from custom contact groups using the inbuilt functionality, which can read the “Status” and the “Number of Attempts” and reset each CDA.

3.2.3 Solutions

1. Flagging records using Smart Update [Procedure 4.1]
2. Creating a custom contact group [Procedure 4.2]
3. Restore records from custom contact groups [Procedure 4.3]

3.3 Scenario 2: Appending new records

3.3.1 Scenario

I want to add new records in but there may be old work still to do.

3.3.2 Discussion

The simplest solution is to just copy the form and use the generated copy. This provides very clear separation of the data and the reporting. It may not always be the best scenario but provides the fastest and cleanest data and reporting separation possible.

The next option is to "park" or hive off the complete records. This is moving all the records into a custom contact group that you simply don't queue up when setting the current working outcome. This means that all your reporting is still on one form and is undisturbed but it does require closer administration of the form. You mass update ALL of the records to move them into a custom contact group. You then just add in your new records.

So assuming you've moved all records into the custom contact group. If there are some of the old records that might need to be brought forward into the new group, then the Smart Update on a key matching field will draw the old records out of the "parked" group into the new calling group. You may not want to move ALL old records away. For this scenario you create a custom group for the ones you're archiving off, then add in the new records.

3.3.3 Solutions

1. Copy a Form [Procedure 4.4]
2. Group update all records [Procedure 4.5] and Blind add [Procedure 4.6]
3. Group update all records [Procedure 4.5] and Smart update [Procedure 4.7]
4. Group update some records [Procedure 4.8] and Blind add [Procedure 4.6]
5. Group update some records [Procedure 4.8] and Smart update [Procedure 4.7]

3.4 Scenario 3: Data archive / removal

3.4.1 Scenario

There are some old records in there I want to archive / remove.

3.4.2 Discussion

Deletion is always dangerous. Deletion affects reporting, affects the ability to recall records and most importantly removes all contact history. Retiring or "parking" records is always more advisable, especially for reporting. Deleting a record will affect historical reporting, so if deletion is to be used, snapshots of reporting need to be taken from the system prior to deletion.

Restoration of data from an All n One back up is a charged event. Restoration is a complicated and generally time sensitive operation, as all records logged since the back-up will be lost as well. For this reason, again, we strongly advise "parking" (Described through Scenarios 1 and 2).

Although you can export a format that will allow for CDA and CCL records to be available in the same file, reimporting those records can be challenging. The CDA and CCL export will provide a file that can be read in again, but attached documents and uploads are not included in the export.

3.4.3 Solutions

1. Group update some records [Procedure 4.8]
2. Group delete some records [Procedure 4.9]
3. Export CDA and CCL compatible formatting [Procedure 4.10]

3.5 Scenario 4: Rules based changes

3.5.1 Scenario

I need rules based (time or group based) changes to my data.

3.5.2 Discussion

Often with data there are times or scenarios with the data where records need to be treated differently. For data protection reasons records need to be removed from possible contact groups. Other times SLA's expire or loom near expiry and the records need attention. Essentially, these records need to be flagged, then actioned. The question is how best to flag the records.

Custom contact grouping can be used to park the records and remove them from working queues.

Often in ongoing campaigns a suite of rules will evolve. "If 30 days from end of SLA", "If over 6 months old", the criteria are potentially endless. So what must be done first is establishing the rules. With those rules clearly defined and agreed, the next step is how to best handle those records.

If the procedure is a once off, a Smart Update works well. In the Smart Update, set the flags as needed, then create the custom groups as necessary.

If the rules need to be applied on an ongoing basis, hourly, daily, weekly or semi-periodically, the a MetaData program is the best approach. In a MetaData program the rules are constructed to allow them be applied immediately as needed.

For data protection reasons, records that haven't been interacted with in X period of time, there is a prebuilt function in BE that quickly and easily deletes the records. The deletion as stated in Scenario 3 is dangerous but by law may be required. Record of contact with the customer may also need to be kept, in which case this procedure would not be appropriate.

3.5.3 Solutions

1. Creating a custom contact group [Procedure 4.2]
2. Smart update records [Procedure 4.7]
3. MetaData Programs [Procedure 4.11]
4. Data Deletion for Data Protection Reasons [Procedure 4.12]

4 Processes & Procedures

4.1 Flagging records using Smart Update

4.1.1 Overview

This procedure demonstrates how to flag a number of records within an existing Form.

4.1.2 Extract the data

The first requirement is to get the records from the system. There are a number of Data reports that are possible to use.

*Main Menu > Data Profiling > Instant – Data >**

*Main Menu > Data Profiling > Instant – Export >**

The primary requirement is to get an Id field. The Id field is what will be used to match the record.

4.1.3 Modify the data

With the spreadsheet of record ids found, then add in a field to flag the records. So the spreadsheet would look something like

ID	Flag 1	Flag 2
1	Group 1	Area 3
2	Group 1	Area 3
3	Group 1	Area 3
4	Group 3	Area 3
5	Group 2	Area 3
6	Group 2	Area 1
7	Group 2	Area 3
8	Group 1	Area 2
9	Group 3	Area 2
10	Group 3	Area 2
11	Group 3	Area 1
12	Group 3	Area 1

The data does not need to contain all Ids. The data does not need to flag all records. The procedure can be used to update subsets of records.

4.1.4 Process the updated data

With the new spreadsheet use the function

Main Menu > Form Management > Form – Data Import > Load Data Records – Smart Update – Upload File

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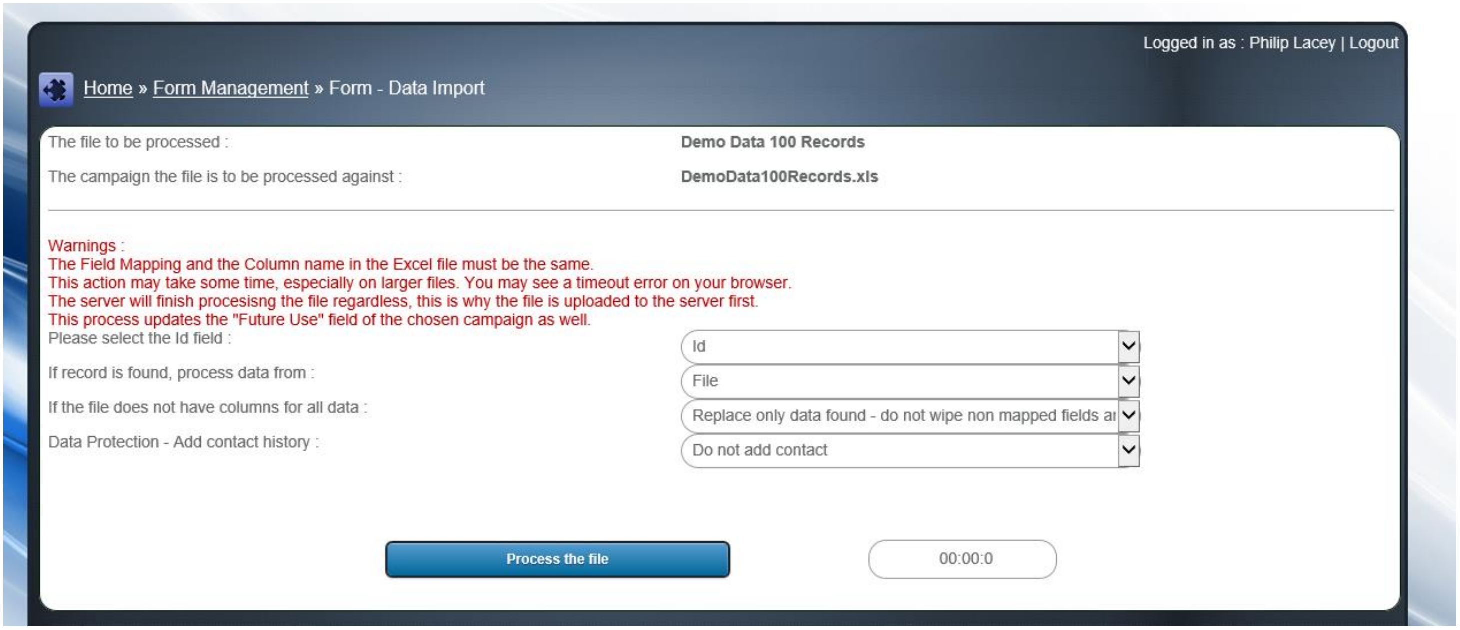
Lower Ballymount Road
Dublin 12
Ireland

At the top of options screen on page 4 of the procedure ensure:

- The Id field is set to ID, or your field mapped Id
- Process data from the file, which will allow the data from your file to overwrite what is in the system
- As we are not uploading a complete set of data, we need to ensure "Replace only data found – do not wipe non mapped fields and only update if data provided"
- Add Contact history should be set to "Do not add contact"



This will use the data in the file, update all matched Ids and overwrite the contents of the Flag fields.

4.1.5 Test the results

You should then use a couple of sample Ids and look up the records to ensure the Flag field has changed as required.

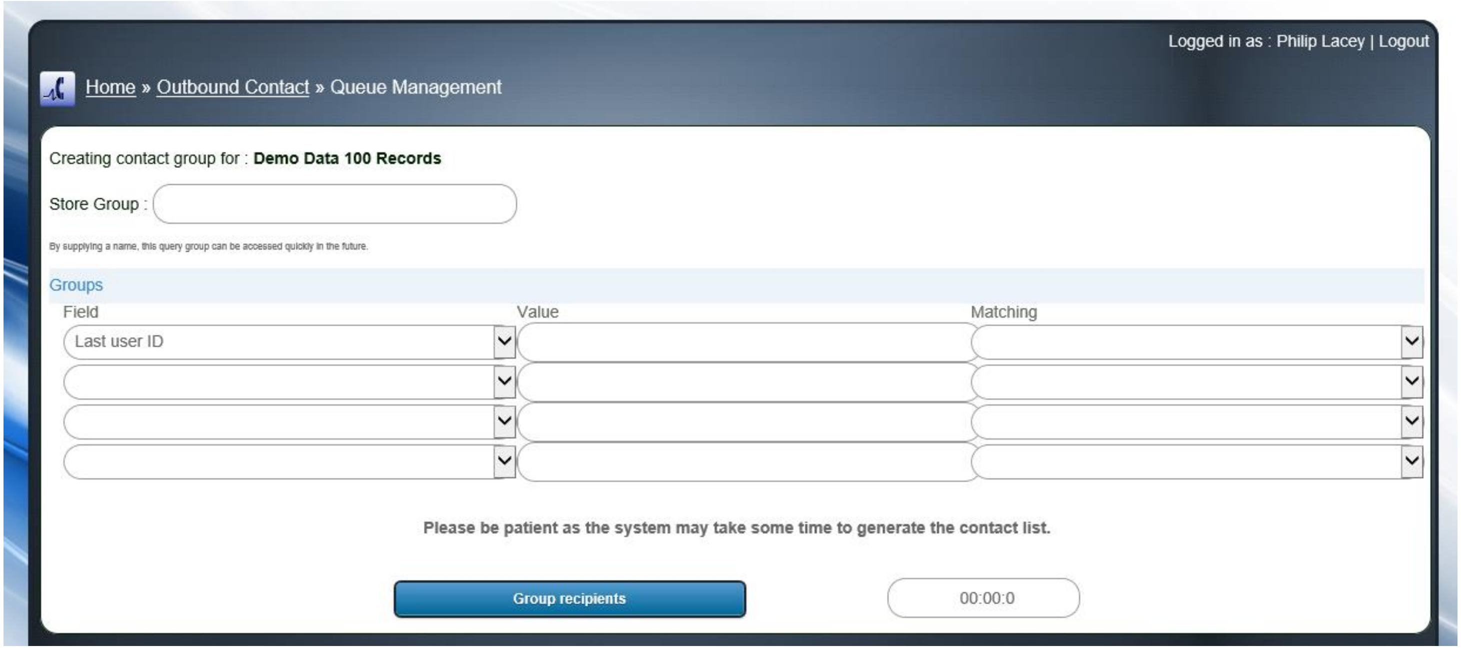
4.2 Creating a custom contact group

4.2.1 Overview

This procedure outlines how to create more advanced custom groups than previous training documents on the subject.

4.2.2 Advanced grouping options

When creating a custom group it is easy to use exact matching. Exact matching is perfect when a flag is clear. Combining rules allows for much greater control of custom groups but are more difficult to create. The specificity of the groups is based on your requirements.



In the matching type drop down list, use of the alternatives can be availed of

- Exact match
- Like
- Starts with
- Ends with
- Greater Than
- Less Than
- Not (Exact match)
- Not Like

Multiple fields can also be utilised to identify the groups. Before the group is created a count of the records is provided to give an indication of the total matches found for those rules. Where you are creating the rules for a set of data where the procedure will have to be repeated again in the future, it can be useful to first set a control group, to ensure your groupings are being created successfully with the rules you are applying.

Universal date time format allows you to use the less than or greater than for groups based by date. E.g. less than 2013-12-19 00:00:00 will provide all records where the date time is less than December 19th 2013.

4.2.3 Combining Groups

Where it is impossible to accurately define the group with one set of grouping options, combined usage can be enacted. Identify the criteria for group one and set the Status to "Test". Define another group and set the Status also to "Test". All of the records will be in the same custom group called "Test". In this way complicated groupings can be created.

Please remember that when the records are processed from this custom group they will return to the normal outcomes in the "Record Status" grid.

4.3 Restore records from custom contact groups

As custom groups are created, for dud groups created or a lack of need to have the groups any more, you may need to reset the number of contacts and status of the records. This function restores custom contact groups back to their previous status and number of contacts.

The function is available from
Main Menu > Outbound Contact > Queue Management > Reset Contact History

All internal and external CCL additions will be counted as contacts.
Please note this function will reset ALL custom groups created by all users.
Please be careful using this function after employing "4.5 Group update all records" or similar on Status and Number of Attempts functions.

4.4 Copy a Form

Copying a form is an effective way of managing separate data sets and is easy to perform.
Main Menu > Form Management > Form – Primary Management > Form – Copy

At this level however, MetaData programs will need to be rewritten as they are not copied and translated.
Copies of Forms are also effective for testing purposes.

4.5 Group update all records

This function is a blind mass update of all records of one field.

Main Menu > Form Management > Form – Data Cleaning > Mass Update – Single Field Update – All Records

After choosing the form, select the field and in the provided space simply type the content you wish to be applied to all fields.

The procedure can also be used to update the Status field when resetting all records. This could be used to "park" all records. Run the procedure first on Status i.e. Field = Status, Value = Retired. Run the procedure again with Field = Number of Contacts, Value = 0.

This function can be very useful in "flagging procedures" where most records need to be initially set to a value e.g. "Standard" and then the exception reporting can be performed using Smart Updates or similar.

4.6 Blind add records

Firstly it is useful to use perform 4.5 Group update all records. Park all the existing records in the form. Once done you can then load the records as normal through:

Main Menu > Form Management > Form – Data Import > Load Data Records – Add Only – Upload File

or

Main Menu > Form Management > Form – Data Import > Load Data Records – Add Only – Use Existing Uploaded File

In the "Report Status" grid you should have two groups to start working from. Data and Statistics reporting should not be affected by this procedure.

This procedure will not link old and new records and is not useful if there is a possibility of the new file potentially having the same records as the old records.

4.7 Smart update records

Firstly it is useful to use perform 4.5 Group update all records. Park all the existing records in the form. Once done you can then load and update the records as normal through:

Main Menu > Form Management > Form – Data Import > Load Data Records – Smart Update – Upload File

or

Main Menu > Form Management > Form – Data Import > Load Data Records – Smart Update – Use Existing Uploaded File

This procedure should draw any old records back into operation if matched.

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4.8 Group update some records

Using procedure 4.1 is the most effective way of updating "some" records.

4.9 Group delete some records

Using procedure 4.1 a set of records can be identified. A flag is then set on these records. You can then double check the data by performing an export and ensure that the records to delete have been correctly flagged.
Main Menu > Data Profiling > Instant – Export > Export – CDAs – Complete.

Once you are sure the correct records are flagged, it is then possible to use the delete function.
Main Menu > Form Management > Form – Form and Data Deletion > Data Deletion - Grouped Data

The selection screen and options are the same as 4.2 Creating a custom contact group.
There is a count which will enable you to confirm that the correct amount of records are to be deleted.

Deletion is permanent and instant. Restoring records is only possible through an entire form restoration procedure.

After the procedure is complete you should be able to use the Ids you identified in the Smart Update procedure to ensure the records have been deleted.

4.10 Export CDA and CCL compatible formatting

The function is available in

Main Menu > Data Profiling > Instant – Export > Export - Create Business Express Archive (All CDA and CCL Data)

This custom format will only import data back into a form that has not been changed i.e. no new fields have been added to the CDA.

The format will also not import / export associated uploaded files, merely references to them.

The file is a CSV format. The first character of each row defines what the row contains

Z = CDA Field Names

Y = CCL Field Names

D = Data Row

C = Call Row

A = End of file

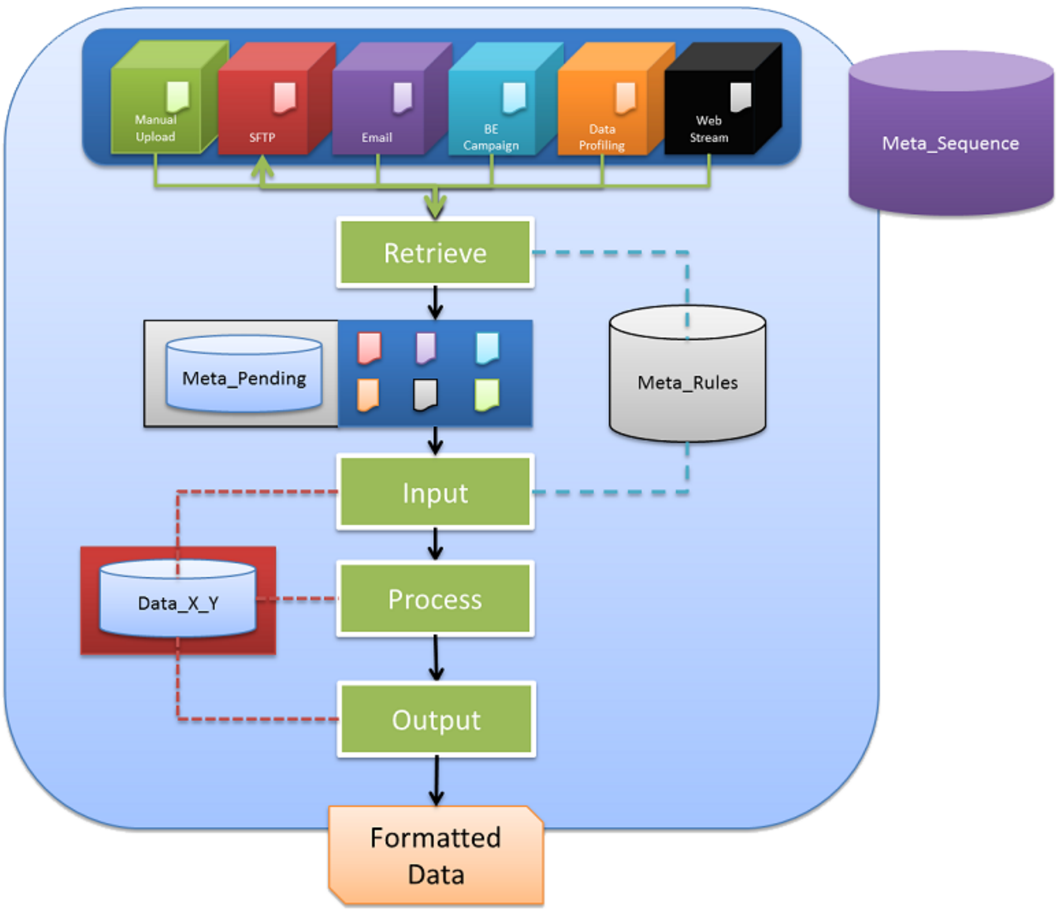
The file is a CSV file, with single inverted commas escaping the contents of each field. When editing the contents of the file, please use Notepad or Notepad++ as Microsoft Excel can introduce hidden characters and effectively corrupt the file.

4.11 MetaData Programs

4.11.1 Overview

The MetaData module is required to set up a MetaData Program. An overview of the MetaData module is available in the document "Module MetaData - description vX-x" where X is the major version and x is the minor revision. The module comes with a manual to guide the user through the setup of rules in a document called "Module - Metadata vX-x" where X is the major version and x is the minor revision.

MetaData is a complicated and intricate module to master. For most programs, All n One support is required.



4.11.2 Structure of Processing

A MetaData rule is an instruction to be performed.

A MetaData sequence is a set of MetaData rules to be performed on all records or a subset of records.

A MetaData program is the sequential execution of a number of MetaData sequences

A MetaData sequence can belong to more than one MetaData program.

4.11.3 Types of Processing

Retrieve

Gets the raw data into the BE infrastructure by what whatever medium available and chosen.

Input

Field mapping and processing rules for extracting data from Excel, structured data or XML documents

Process

Can be considered a number of stages which may / may not be required.

1. Initial data setup
2. Ensuring data is all on one line
3. Data Tidy up
4. Data conversion
5. Data transfer

Output

A sequence of post processing tasks including communications, report generation and follow up tasks.

4.12 Data Deletion for Data Protection Reasons

Creating complex rules for Data Protection reasons can be difficult. BE provides a very simple data deletion function which can be used by non-technical users with very little need for grouping or complex setups.

Main Menu > Form Management > Form – Form and Data Deletion > Data Deletion - Data Protection - Remove records older than selected data

This function will delete any record where the "Last Contact Date and Time" is older than whatever time period is selected.

Please note that data deletion also deletes any associated contact records. So for auditing and communication purposes all history of contact with this record will also be deleted.

Where auditing is required, "parking" the records is a better approach.