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Project: Case Management

System Modifications facilitating new Case Management tools and reports

Author: Philip Lacey

Version: 1-0

Date: 2012-02-19



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Business *express*

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1. Overview

This document outlines how the Case Management module has contributed to modifying Business Express and added a significant number of new features.

2. Acronyms and Abbreviations

API	Application Programming Interface
BE	Business Express
CCL	Campaign Call, a contact record associated with a CDA
CDA	Campaign Data, the table holding the customer info
CTI	Computer Telephony Integration
HTTP	HyperText Transfer Protocol
N/A	Not applicable
PBX	Public Branch Exchange
URL	Universal Resource Locator (e.g. http://www.google.ie)

3. Revision History

Version	1-0-1
Date	2012-02-20
Author	Philip Lacey
Modifications	Release revision inclusions
Version	1-0-0
Date	2012-02-13
Author	Philip Lacey
Modifications	Initial document collation from numerous sources

Any software change and/or update is controlled with version control. Older versions shall be retained in accordance with corporate retention and storage management policies.

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4. Table of Contents

1. Overview	2
2. Acronyms and Abbreviations	2
3. Revision History	2
4. Table of Contents.....	3
5. Key Structural Changes.....	4
6. Key Understandings.....	5
6.1 Functional Versus Content	5
6.2 Data Demographics.....	5
7. Security Groups.....	5
8. Reporting Restructuring	6
9. Functionality Restructuring.....	7
9.1 Database Management (formerly Campaign Management)	7
9.2 Data Profiling	9
9.3 Inbound Contact	10
9.4 Outbound Contact.....	11
9.5 Case Management.....	12
10. Key new functionality.....	13
10.1 Statistics reporting layout	13

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5. Key Structural Changes

The general roles for which BE is used in Inbound, Outbound and Case Management campaigns are:

Agent:	Data Entry and Operational Tasks
Team Lead:	Ability to review team members and manage operations
Reporter:	Abilities to perform reports on any aspect of the data
System Champion:	Ability to add, edit and delete campaigns and data
Executive:	High level views of work progress

Each level has all the functionality and abilities of the level listed above them. i.e. a team lead has all the abilities of a team lead and an agent, where a champion can perform all the actions of an agent, team lead, reporter and system champion.

Reporting on data falls under specific foci:

My:	Reports only displaying for an individual
My Team:	Reports for all individuals in which the person is also a member of the team
Grouped:	Identified specific groups of data
All:	All data

The key modules for delivering contact centre functionality are:

- Inbound Contact
- Outbound Contact
- Campaign Management
- Data Profiling
- Case Management

All OPERATIONAL activity will remain in the respective modules.

Inbound Contact, Outbound Contact and Case Management will allow users to perform all required operational tasks.

REPORTING activity has been restructured.

All My and My Team reporting is available in the operational modules. i.e. all My and My Team reports are available through Inbound Contact, Outbound Contact and Case Management.

All Grouped and All reporting will now only be available through the Data Profiling module.

Campaign Adding, Editing and Deleting is still managed through campaign management but the module name is going to change to Database Management, as Business Express campaigns now represent so much more than just a campaign.

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6. Key Understandings

6.1 Functional Versus Content

There is a complete separation between functional access and content access.

Functional access is managed through System Access management and it is here where a user is granted access to specific functionality and reporting tools.

Content access is granted in the relative module. i.e. for All inbound, outbound and case management campaign access, this content access is granted through the Security Manager section.

6.2 Data Demographics

“Demographics are the most recent statistical characteristics of a population.”

Whilst the reporting to data has indeed been a statistical representation of the population of data in a given campaign, with new reporting coming on stream, the word demographic is no longer always applicable.

All instances of the word “Demographic” will now be changed to “Visualisation”

7. Security Groups

In order to allow Teams to be created a new security engine facilitating dynamic groups had to be created.

Project: Security Groups represents this change.

This document can be found online at

<http://www.allnone.ie/projects/Project%20-%20Security%20Groups%20v1-0.pdf>

All Team reporting will pull from the Security Groups the individual user will be a member of.

Any person of team can generate a Team report IF they have functional access to the Team section of the respective operational module.

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8. Reporting Restructuring

Reports in BE now fall under the following general grouped headings:

- Data
- Statistics
- Visualisations
- Reminders
- Incompletes
- Scores

Combining this reporting with the roles we end up with the following matrix.

	Inbound	Process	Outbound
Agent	<ul style="list-style-type: none"> Inbound Record Outbound Record Case Record Test Record <ul style="list-style-type: none"> Form Entry Personal Reminder Call back 		<ul style="list-style-type: none"> My Records My Stats My Dashboard <ul style="list-style-type: none"> My Incompletes My Reminders My Scores
Team Lead	<ul style="list-style-type: none"> AE Record on Behalf 	<ul style="list-style-type: none"> AEDM Working Group Load File Reassign Records Exception Cases Report Library <ul style="list-style-type: none"> Data Cleaning Media Management Test Scoring QA Scoring 	<ul style="list-style-type: none"> Team Records Team Stats Team Dashboard <ul style="list-style-type: none"> Team Incompletes Team Reminders Team Scores
Reporter	<ul style="list-style-type: none"> AED QA Assessment 	<ul style="list-style-type: none"> Meta-Data Management 	<ul style="list-style-type: none"> Group Records Group Stats Group Dashboard <ul style="list-style-type: none"> Group Incompletes Group Reminders Group Scores
Champion		<ul style="list-style-type: none"> Build AED Question AED Answer Values Delete Records AED Outcome 	<ul style="list-style-type: none"> All Records All Stats All Dashboard <ul style="list-style-type: none"> All Incompletes All Reminders All Scores
Executive			<ul style="list-style-type: none"> Dashboards

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9. Functionality Restructuring

9.1 Database Management (formerly Campaign Management)

Database Management has had 2 sections completely removed to two new standalone modules.

Report Library and Report Library Administration are now located in the module Report Library.

Media Manager and Media Reporter are now located in the module Media Manager.

Set Current Working outcome, is an operational tool and as such is now available in both Outbound Contact and Case Management modules as a section called Queue Management

Reporting – Data Reports and Reporting – Demographic Reports have been moved to the Data Profiling module.

Questions management has been removed from the Campaign management section to a subsection on its own to allow for easier granting of delegated access to functionality.

Field Mapping has also been moved its own subsection

The dangerous functionality of deleting records has also been removed to its own subsection to improve secure management of data and again help improve the ability to delegate functional access.

The functionality for data import and export has also been split to make it easier to find importing and exporting functions, grouped logically.

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Old	New																									
<h3>Campaign Management Menu</h3> <p>Click a button to jump down the page to the selected section. You can click any "Back to top" button to return here.</p> <table border="1"><tr><td>Outbound Calling Mgmt</td><td>Reports - Data Reports</td><td>Reports - Demographic Report</td><td>Report Library</td><td>Report Library - Administration</td></tr><tr><td>Campaign Manager</td><td>Security Manager</td><td>Warehouse Manager</td><td>Data Cleaning</td><td>Outcome Manager</td></tr><tr><td>Team Manager</td><td>Media Manager</td><td>Media Reporter</td><td></td><td></td></tr></table> <ul style="list-style-type: none">+ Outbound Calling Mgmt Back to top ^+ Reports - Data Reports Back to top ^+ Reports - Demographic Reports Back to top ^+ Report Library Back to top ^+ Report Library - Administration Back to top ^+ Campaign Manager Back to top ^+ Security Manager Back to top ^+ Warehouse Manager Back to top ^+ Data Cleaning Back to top ^+ Outcome Manager Back to top ^+ Team Manager Back to top ^+ Media Manager Back to top ^+ Media Reporter Back to top ^	Outbound Calling Mgmt	Reports - Data Reports	Reports - Demographic Report	Report Library	Report Library - Administration	Campaign Manager	Security Manager	Warehouse Manager	Data Cleaning	Outcome Manager	Team Manager	Media Manager	Media Reporter			<h3>Database Management Menu</h3> <p>Click a button to jump down the page to the selected section. You can click any "Back to top" button to return here.</p> <table border="1"><tr><td>Database - Primary Management</td><td>Database - Question Management</td><td>Database - Field Mapping</td><td>Database - Data Import</td><td>Database - Data Export</td></tr><tr><td>Database - Security Access</td><td>Database - Outcome Access</td><td>Database - Outcome Manager</td><td>Database - Data Cleaning</td><td>Database - Data Deletion</td></tr></table> <ul style="list-style-type: none">+ Database - Primary Management Back to top ^+ Database - Question Management Back to top ^+ Database - Field Mapping Back to top ^+ Database - Data Import Back to top ^+ Database - Data Export Back to top ^+ Database - Security Access Back to top ^+ Database - Outcome Access Back to top ^+ Database - Outcome Manager Back to top ^+ Database - Data Cleaning Back to top ^+ Database - Data Deletion Back to top ^	Database - Primary Management	Database - Question Management	Database - Field Mapping	Database - Data Import	Database - Data Export	Database - Security Access	Database - Outcome Access	Database - Outcome Manager	Database - Data Cleaning	Database - Data Deletion
Outbound Calling Mgmt	Reports - Data Reports	Reports - Demographic Report	Report Library	Report Library - Administration																						
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9.2 Data Profiling

This module is now the primary source of reporting for Reporters.

PreGrouped reporting represent the "All" reports in the system, as they are not limited by individual or team.

Group reporting represents the custom "Group" reports allowing for groups based on specific criteria to be created.



There is also a further two new sections for System – Dashboards and also Reminders and Case Management.

System – Dashboards are for system based reports that are at a higher reporting level than specific data records.

Reminders and Case Management provide centralised reporting on reminders and cases from all three operational modules.

The reporting sections are now split according to reporting structure types.

Scores functionality with tie in with the Testing Centre and also Quality Assurance modules and are currently unavailable to reporters.

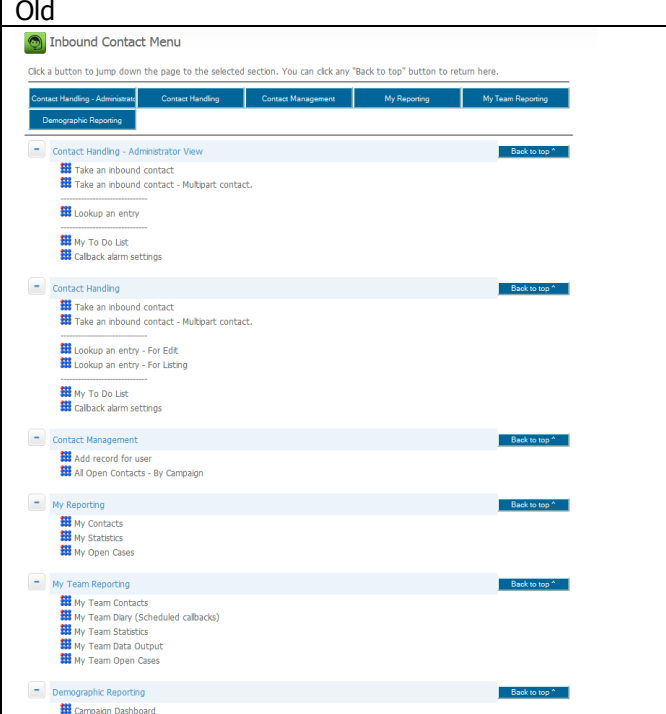
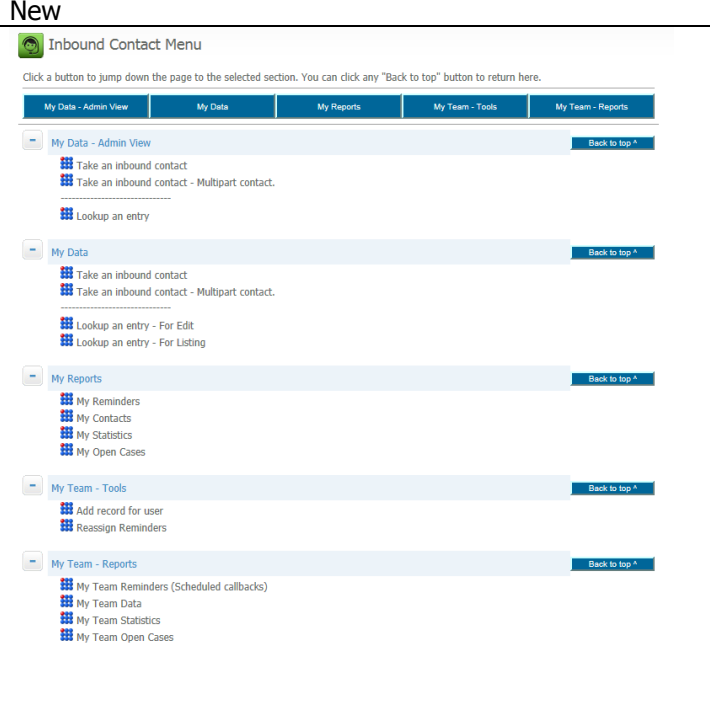
Old	New																									
 Data Profiling Menu Click a button to jump down the page to the selected section. You can click any "Back to top" button to return here. <table border="1"><tr><td>Manage Groups</td><td>Campaign Data Reports - Usin</td><td>Campaign Demographic Repor</td><td>Group Dashboards</td><td>Data Filtering - Management</td></tr><tr><td colspan="5">Data Filtering - Reporting</td></tr></table> <ul style="list-style-type: none">+ Manage Groups Back to top ^+ Campaign Data Reports - Using Groups Back to top ^+ Campaign Demographic Reports - Using Groups Back to top ^+ Group Dashboards Back to top ^+ Data Filtering - Management Back to top ^+ Data Filtering - Reporting Back to top ^	Manage Groups	Campaign Data Reports - Usin	Campaign Demographic Repor	Group Dashboards	Data Filtering - Management	Data Filtering - Reporting					 Data Profiling Menu Click a button to jump down the page to the selected section. You can click any "Back to top" button to return here. <table border="1"><tr><td>System - Dashboards</td><td>Reminders and Case Managen</td><td>PreGrouped - Data</td><td>PreGrouped - Statistics</td><td>PreGrouped - Scores</td></tr><tr><td>PreGrouped - Visualisations</td><td>Group - Management</td><td>Group - Data</td><td>Group - Data - Filtered</td><td>Group - Statistics</td></tr><tr><td colspan="2">Group - Scores</td><td colspan="3">Group - Visualisations</td></tr></table> <ul style="list-style-type: none">+ System - Dashboards Back to top ^+ Reminders and Case Management Back to top ^+ PreGrouped - Data Back to top ^+ PreGrouped - Statistics Back to top ^+ PreGrouped - Scores Back to top ^+ PreGrouped - Visualisations Back to top ^+ Group - Management Back to top ^+ Group - Data Back to top ^+ Group - Data - Filtered Back to top ^+ Group - Statistics Back to top ^+ Group - Scores Back to top ^+ Group - Visualisations Back to top ^	System - Dashboards	Reminders and Case Managen	PreGrouped - Data	PreGrouped - Statistics	PreGrouped - Scores	PreGrouped - Visualisations	Group - Management	Group - Data	Group - Data - Filtered	Group - Statistics	Group - Scores		Group - Visualisations		
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9.3 Inbound Contact

Old	New
	

Operational functionality and reporting have been clearly separated.

Redundant functionality has been removed.

Higher level reporting has been removed to Data Profiling.

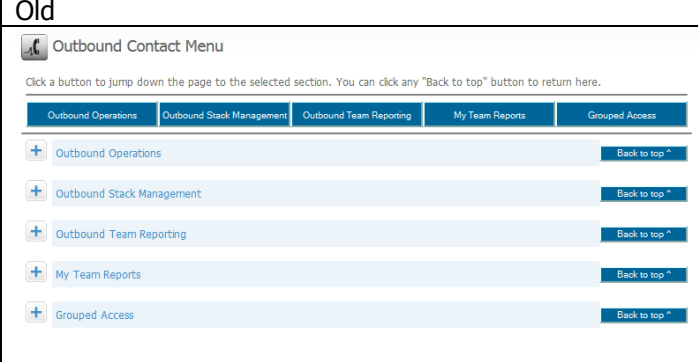
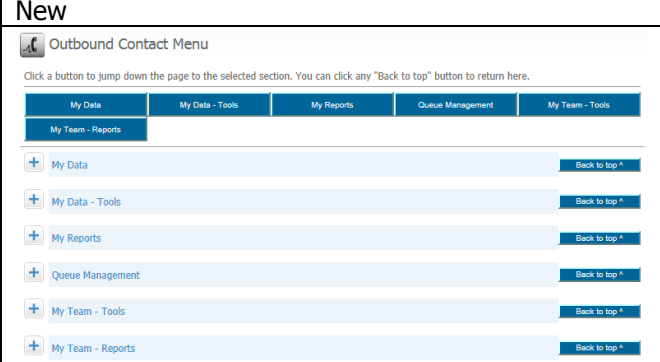
All team reporting is now fully operational and based on security groups.

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9.4 Outbound Contact

Old	New
 <p>Outbound Contact Menu</p> <p>Click a button to jump down the page to the selected section. You can click any "Back to top" button to return here.</p> <p>Outbound Operations Outbound Stack Management Outbound Team Reporting My Team Reports Grouped Access</p> <ul style="list-style-type: none">+ Outbound Operations Back to top ^+ Outbound Stack Management Back to top ^+ Outbound Team Reporting Back to top ^+ My Team Reports Back to top ^+ Grouped Access Back to top ^	 <p>Outbound Contact Menu</p> <p>Click a button to jump down the page to the selected section. You can click any "Back to top" button to return here.</p> <p>My Data My Data - Tools My Reports Queue Management My Team - Tools</p> <p>My Team - Reports</p> <ul style="list-style-type: none">+ My Data Back to top ^+ My Data - Tools Back to top ^+ My Reports Back to top ^+ Queue Management Back to top ^+ My Team - Tools Back to top ^+ My Team - Reports Back to top ^

Operational functionality and reporting have been clearly separated.

Redundant functionality has been removed.

Higher level reporting has been removed to Data Profiling.

All team reporting is now fully operational and based on security groups.

There is a new subsection Queue Management that allows the outbound calling stacks to set directly from within Outbound Contact.

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9.5 Case Management

Case management is a combination of Inbound, Outbound and Blended functionality, with some added features to facilitate timing based reports.

Cases can be created in Inbound and Outbound and then managed operationally in Inbound, Outbound or in Case Management.

Case adds extra considerations when dealing with multi-contact cases and their associated reporting.

Case Management specifically allows submitted forms to be managed as cases with full timed reporting.

The screenshot displays the 'Case and Form Management Menu' interface. At the top, there is a navigation bar with tabs for 'My Forms', 'My Cases', 'My Reports', 'Queue Management', and 'My Team - Tools'. Below this, a list of menu items is shown, each with a 'Back to top' button. The menu items are organized into sections: 'My Forms' (Submit a Form, My Forms), 'My Cases' (Create a Case, Process a Case, Look up a Case, Profile a Case), 'My Reports' (My Reminders, My Still Open Cases), 'Queue Management' (Set Current Working Outcome, Set Current Working Outcome by Period, Create custom contact group, Reset Contact History, View contact queue, Add to contact queue, Clear contact queue), 'My Team - Tools' (Outbound GRTD, Agent - Incomplete Records Report, Reassign Reminders), and 'My Team - Reports' (My Team - Reminders, My Team - Contacts, My Team - Statistics, My Team - Open Cases, My Team - Exception Cases, My Team - Case Timing, All - ReOpened Cases).

