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BER8 – Service Enhancement Release 1

Record Management Engine overhaul, One Question Per Page engine, numerous system enhancements and detailed documentation.

Author: Philip Lacey
Version: 1-14
Date: 2013-10-07

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1 Overview

1.1 Introduction

Business Express Release 8 (BER8) focuses on your experience of All n One / Business Express. Ensuring you the user has the best, most consistent and most effective experience possible. All the changes to the service are designed to make the solution easier, faster and more effective to use.

BE has seen a steady broadening in in the way it's deployed across a number of sectors and this has necessitated a number of engine changes and enhancements for example the new availability of a single question per page approach. The changes have also inspired a number of changes to, and reorganisation of, a number of modules. This document outlines these improvements.

We are also working towards an improved learning experience tied in with improved access to knowledge bases.

1.2 Acronyms and abbreviations

1.2.1 General acronyms

BE	Business Express
BER8	Business Express Release 8
QA	Quality Assurance
ROI	Return on Investment
RRP	Recommended Retail Price
SER1	Service Enhancement Release 1

1.3 Version History

Version	1-14
Date	2013-11-12
Author	Philip Lacey
Modifications	Further changes to the Data Profiling module. Inclusion of the Statistics Calculation and Statistics Report functionality.

Version	1-13
Date	2013-11-11
Author	Philip Lacey
Modifications	Renumbering of all the headings and use of a better numbering approach based on style. Added a new chapter to describe the Data Profiling changes. Change to reporting keywords of PreGrouped and Grouped to Instant and Customised.

Version	1-12
Date	2013-11-08
Author	Philip Lacey
Modifications	Addition of Project definitions to the Lexicon.

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Version	1-11
Date	2013-11-01
Author	Chris Thomson
Modifications	Review of document and release editing.

Version	1-10
Date	2013-10-31
Author	Philip Lacey
Modifications	Inclusion of the Welcome Screen engine. Inclusion of Wixi? icon. Final documentation overhaul.

Version	1-9
Date	2013-10-30
Author	Philip Lacey
Modifications	Extended the Lexicon. Added graphics and screenshots to explain numerous items. Primary QA record reduction functionality developed.

Version	1-8
Date	2013-10-29
Author	Philip Lacey
Modifications	Introduction reworked. New inclusions to Form management to reflect new developments. Extensive restructuring of flow of items. Inclusion of (New Feature) and (Updated Feature) to item titles.

Version	1-7
Date	2013-10-25
Author	Patrick Jenkins
Modifications	Additions of the dashboard reporting types

Version	1-6
Date	2013-10-24
Author	Philip Lacey
Modifications	Reorganisation of the Form Management module. Inclusion of the BE Lexicon

Version	1-5
Date	2013-10-16
Author	Philip Lacey
Modifications	Inclusion of Consoles and Dashboards

Version	1-4
Date	2013-10-14
Author	Philip Lacey
Modifications	Modification of console listing and inclusion of information on consoles built to date.

Version	1-3
Date	2013-10-09
Author	Philip Lacey
Modifications	Inclusion of keyword changes and updating to match. Form Builder Engine added into the documentation.

Version	1-2
Date	2013-10-09
Author	Philip Lacey
Modifications	Inclusion of grid of functionality. Redevelopment of the Form creation and delivery engine notes.

Version	1-1
Date	2013-10-08
Author	Philip Lacey
Modifications	Inclusion of QA and Survey module details

Version	1-0
Date	2013-10-07
Author	Philip Lacey
Modifications	Initial document draft

1.4 Contents

1.5 Functionality Matrix

The functionality matrix outlines some of the primary differences between modules.

Module > Functionality v	Inbound	Outbound	Case Management	Testing Centre	Survey	Quality Assurance
1. Operation Specific Functions	✓	✓	✓	✓	✓	✓
2. Operation Specific Reporting	✓	✓	✓	✓	✓	✓
3. Agent can add record	✓	✗	✓	✓	✓	✓
4. External Interaction	✓	✓	✓	✗	✓	✓
5. Vertical Delivery	✓	✓	✓	✓	✗	✓
6. Horizontal Delivery	✗	✗	✗	✓	✓	✗
7. Scoring Management	✗	✗	✗	✓	✓	✓
8. Ability to Rescore	N/A	N/A	N/A	✗	✓	✗

3. Allows the addition of a new record to an existing form.
4. Records can be added, edited and displayed externally, for example to websites.
5. & 6. This feature is explained in section 4.2 of this document.
7. Each record can be scored when completed.
8. Recalculation of the score after the record has been initially scored.

1.6 Wixi

We have built a Wikipedia style resource called Wixi which contains help files, processes and procedures for numerous aspects of BE.

Our Wixi can be found at http://www.allnone.ie/wixi/

To make the Wixi more accessible and reduce search times we have integrated many articles directly into the BE interface. When you see the ? icon it will take you to the relevant article for that item.

1.7 Welcome Screen

In order to improve the BE experience for first time users we have created a Welcome Screen which will display when a user first logs in which can subsequently be disabled. This welcome screen can be tailored by organisation, or even user.

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2 Reorganisation

2.1 Key Word Changes

2.1.1 From Campaign | Campaign Database to Form

When BE is used for data capture a structure needs to be built to hold that data and to date a number of terms have been used to describe this collection of database tables.

- The CDA, which stores data
- The CCL, which stores contacts
- COU stores outcomes and their settings
- CFN stores field mapping information
- CDD stores questions and supporting information.

Collectively they are held together with a common id and the terms used for this collection have been *campaign*, *database* or *campaign database*, *test, examination* or *Q.A. programme*. To reflect the common structure a more generic term was required and *Form* is now going to be used instead. Thus, for example, Database Management will become Form Management. Building a form will refer to building what was called an Inbound Campaign as well as building a test.

2.1.2 Console and Dashboard

There are a number of useful functional groupings within BE designed to speed up operations with a common thread, such as Security Management or Form Management. Where there is a collection of reports, these will be referred to as a *Dashboard* and a collection of common functionality it is now referred to as a *Console*.

2.1.3 Examination vs. Testing Keyword

BE has the ability to allow the keyword used to describe tests, examinations etc. to be customised:
System Access Management > System Management > System Keywords

Any word can be used in the system but our documentation will use the word Examination throughout.

2.1.4 BE Lexicon

We now have standard terms which are used consistently throughout BE and its modules.

Function: A process that follows the structure; input > process > output for working on data within the system. *Functions* are accessed through *Modules*

Section: A logical group of functions within a module of an operational type. See 2.2.1

Module: A collection of related functionality grouped for convenience

System: The collective name for the entire Business Express solution

Form: A data storage structure made of 5 tables and supporting data records

Question: A collective term for a column of data within the CDA table and its associated data

Open and Closed Questions: An *open* question allows users to input anything into the answer whilst with a closed question the user chooses a particular option
http://www.allnone.ie/wixi/index.php?title=Form_Closed_Vs._Open_Questions

Script: The form as displayed to the user, what is specifically visible to them

Field: Synonymous with *question* but applied in the context of external systems integration and data mapping processes

Record: A single entry in the CDA table with one or many associated records in the CCL table

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Field Mapping: A title given to a CDA field

Outcome: Used to describe the completion of an interaction with a record which also has functional abilities associated with it. Also referred to as a disposition code

Weighting: A value placed on a field for scoring purposes

System List Field: A drop down list the contents of which are system controlled. Such a list displays words but uses numbers to identify values

Wixi: The Business Express Wikipedia. See 1.6
http://www.allnone.ie/wixi/

Go Live: The point at which the script is released to users (preferably after extensive testing!)

BE Project: A collection of development changes and documentation regarding changes to the Business Express system.

Client Project: A client specified collection of development changes and documentation, which may include elements that are not part of Business Express.

Instant Reporting: Prebuilt reports requiring little / no customisation to generate

Customised Reporting: Reports that use stored settings to limit content and remember options to reduce time creating reports

2.2 Functional reorganisation of *My* and *My Team* Data and Reports

2.2.1 Roles

BE sees four main user types:

- Agent
- Team Lead
- Reporter
- System Champion

The agent uses basic functions and is general able to see only their own records.

The team lead can generally view the records of all those within their own group or department.

The reporter has access to functions which deliver reports and data. Often these users are limited to these functions.

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2.2.2 Modules

The System Champion tends to have access to all functions. These modules control the engine building and reporting.

- Form Management
- Data Profiling
- Report Library
- System Access Management

These are referred to collectively as Form Engine Management Modules (FEMMs).

Agent and Team Lead functions are managed by operational modules. The modules which use the BE Form engine are:

- Inbound Contact
- Outbound Contact
- Case Management
- Testing Centre
- Quality Assurance
- Survey Management

These are referred to collectively as Form Engine Operational Modules (FEOMs).

2.2.3 Functionality Movement

Anything which is not related to Agent or Team Lead functions has been moved to the FEMMs. This has the greatest impact on *Testing Centre* which will see much of its functionality removed with *Form Management* now providing adding, editing, scoring and question management.

2.2.4 Form Engine Operational Modules structure

Each of the six modules follows the structure:

- My Data
- My Reports
- My Team Data
- My Team Reports
- Support Data Functions
- Support Reports

My Data functions allow an agent to add, edit and update a record
My Reports allows the user to view their data
My Team Data provides for data editing and management for those in the same team or department
My Team Reports manages reporting on agents' records in the same team or department
Support Data Functions are specific to the operation of that module
Support Reports are module specific reports

2.2.5 Form Engine Management Modules structure

We have made some strategic changes to the structure and setup of systems.

System Access Management provides user setup and now also grants function and content access

Form Management is all about creating and managing forms, questions, outcomes and content

Data Profiling manages cross user based reporting. You can carve up your data any way you like

Report Library provides a storage and retrieval mechanism for reports. Reports are now automatically sent to the library to await collection

3 Module – Form Management (Updated Feature)

3.1 Reorganisation (Updated Feature)

A significant amount of restructuring has been carried out within Form Management to improve both the management and build function.

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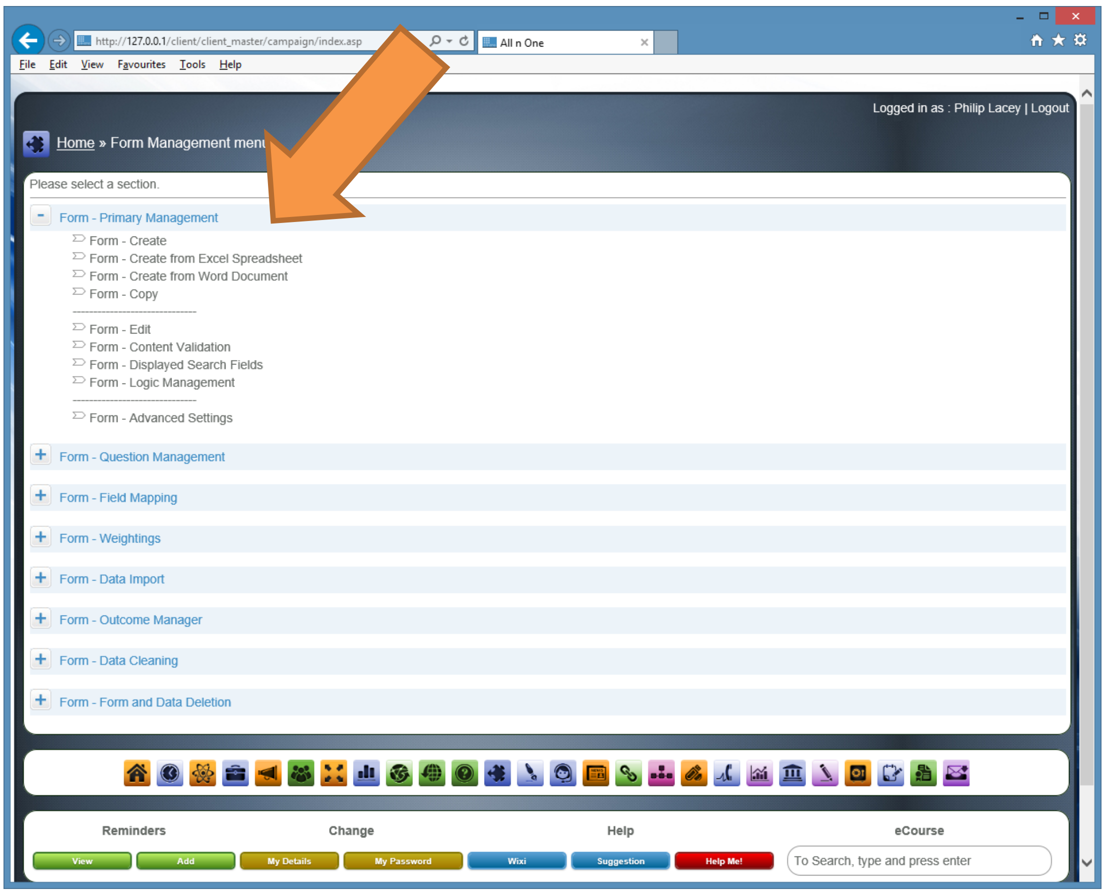
3.2 Form Creation (Updated Feature)

Form creation has been standardised and all previous form creation types have been removed. The removal of old functionality does not remove access to any features, simply changes the way they are accessed.

There are now four ways to create a form:

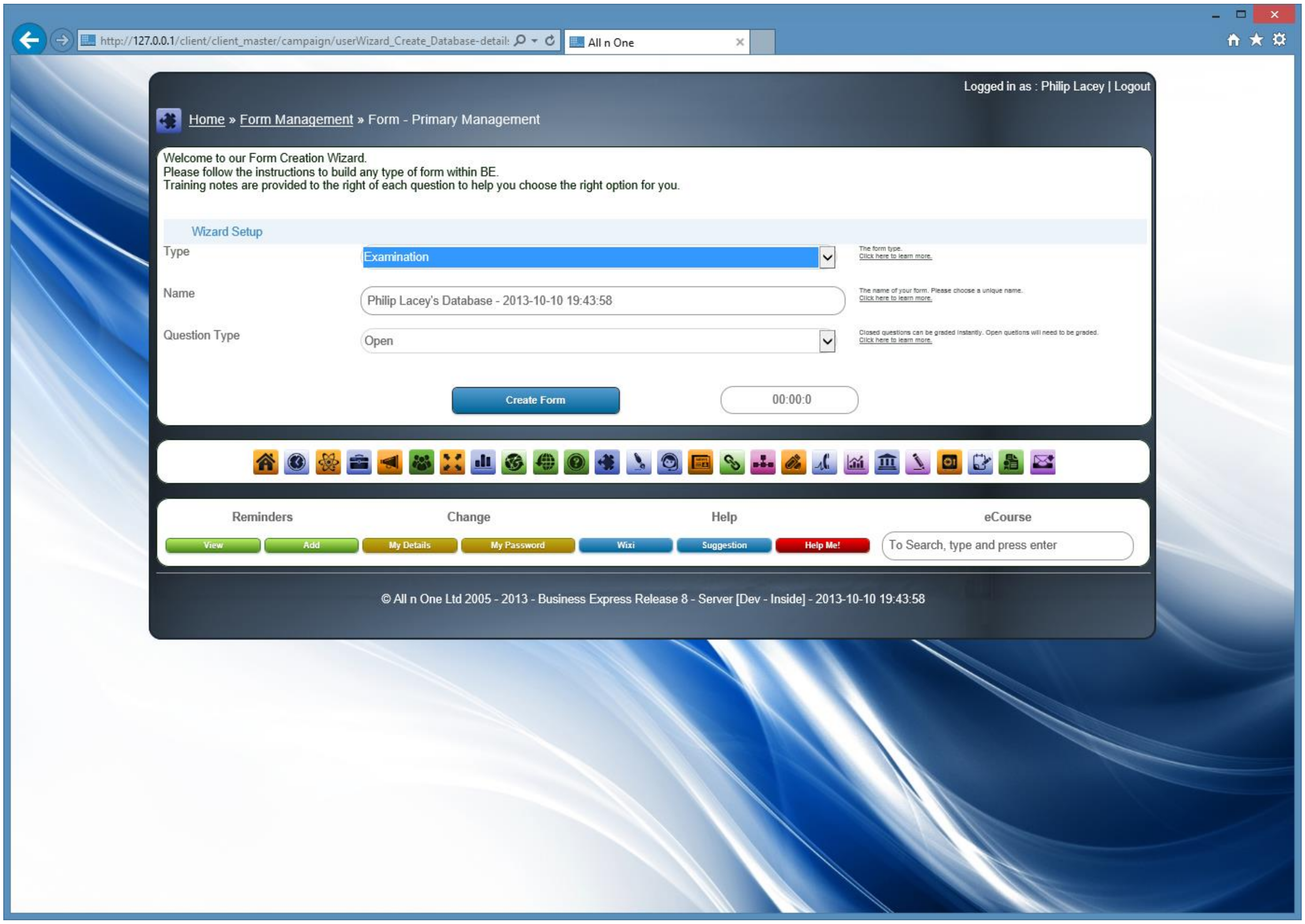
1. From the BE Wizard
2. From a Microsoft Excel Spread sheet
3. From a script / Microsoft Word Document
4. From an existing Form



3.2.1 Forms from the BE Wizard (Updated Feature)

The first screen has been simplified and the process will now create all tables and other parts of the campaign to make it immediately ready for use.

There is new inline help facility available to explain the different types.



3.2.2 Forms from a Microsoft Excel Spread sheet (Updated Feature)

It is now possible to create a form from a spread sheet. The system uses the first row of the first sheet to create the questions of the form. Once the sheet is uploaded it is then processed, pulling any data records into the newly created questions.

3.2.3 Forms from a Script / Microsoft Word Document (New Feature)

You can also create a form from a script. Formatting requires that questions are separated on new lines and that each question line starts with the letter Q followed by a space. *Non-Q* lines are ignored.

There are a number of sample scripts available on the Wixi

http://www.allnone.ie/wixi/index.php?title=Form_Example_Word_Scripts

3.2.4 Forms from a copied Form

As always it is possible to copy an existing form which will carry over all JavaScript and security permissions.

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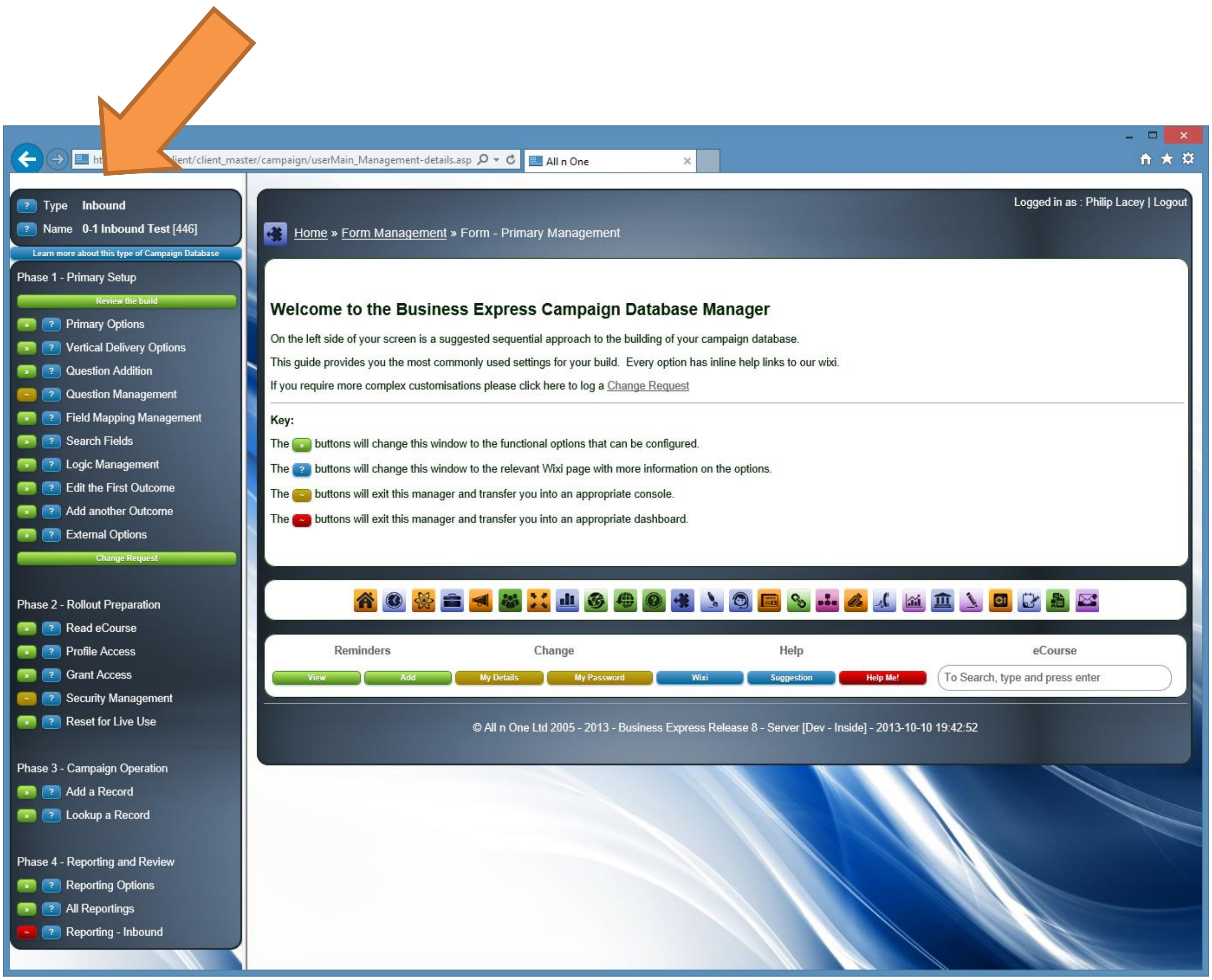
3.3 Building Engine Console (New Feature)

The largest change in the whole of BER8 SER1 is the *Form Building Engine Console* which provides a step by step procedural guide to the most common build requirements.

The console is dynamic and changes for the various types of Forms. Comprehensive inline help is available through the Wixi blue buttons.



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3.4 Wixi Entries (Updated Feature)

Wixi for BE is integral to the Form Engine Builder and is available externally at http://www.allnone.ie/wixi/ In the system the Form Engine Builder jumps you to the appropriate topic area to reduce search time.

Use the  buttons to jump to relevant material.

3.5 All Settings (Updated Feature)

This change will be made available through the *All Settings* option available in *Form – Primary Management*.

3.6 Answer Value Management (Updated Feature)

Adding answer values to a question has been simplified with the *Add* and *Edit* features combined into *Answer Values Management.*

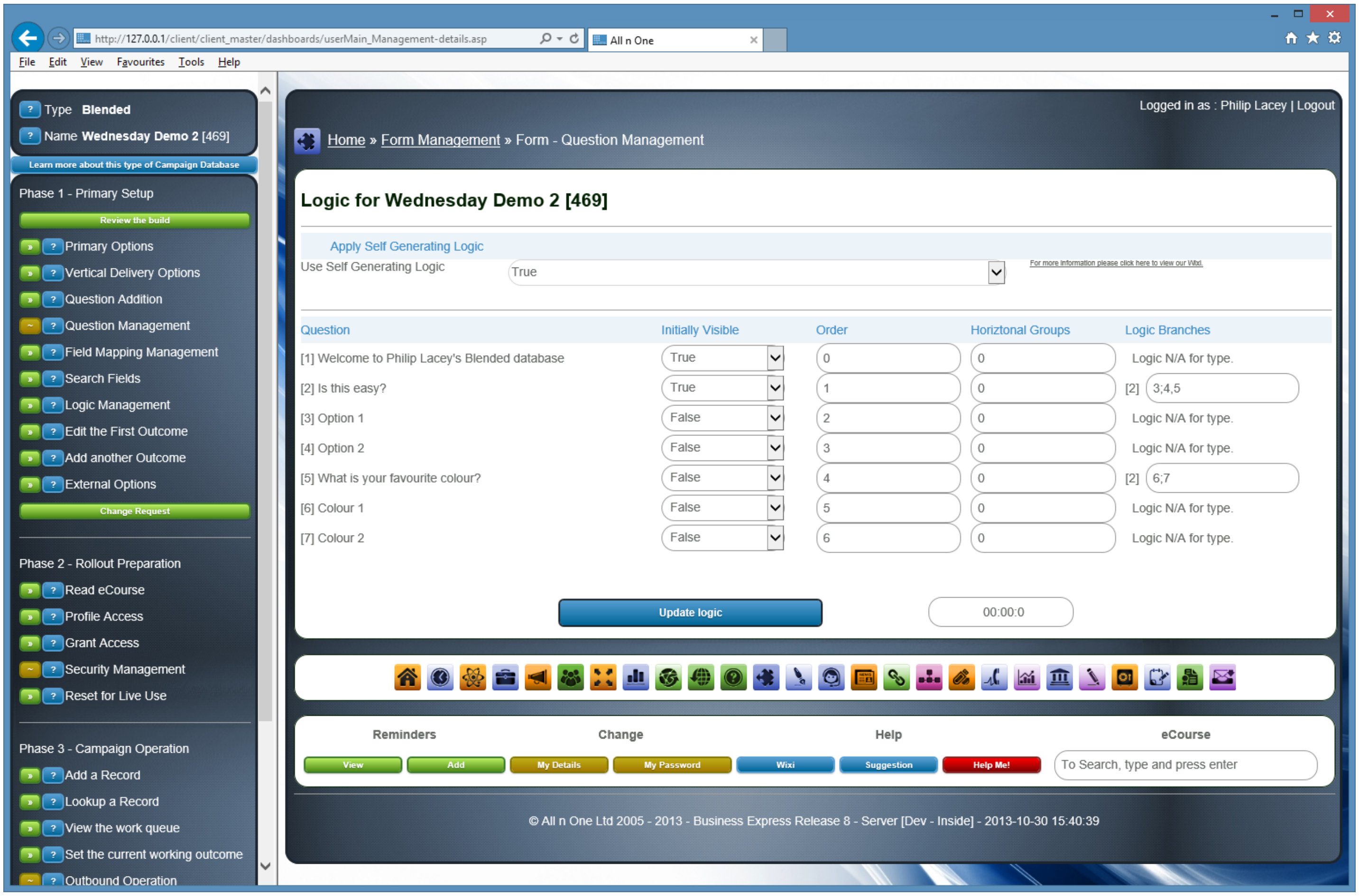
Name and id fields are now hidden as they rarely require intervention. The initially selected values field is also little used and has been removed from the interface but remains available for specific uses.

The remaining boxes are for the *Value* and *Display* values. Editing allows any item to be altered and the *add* boxes accommodate new items. Whenever there are values in the add boxes, the system will bring the user back to add more answers. Having the *edit* and *add* functions on the same page speeds up answer list management.

3.7 Self Generating Logic (New Feature)

Another example of simplification is the new self-generating logic engine which allows users to introduce logic branching without needing to understand how programming works.

The Wixi article explaining the engine is at:
http://www.allnone.ie/wixi/index.php?title=Form_Self_Generating_Logic



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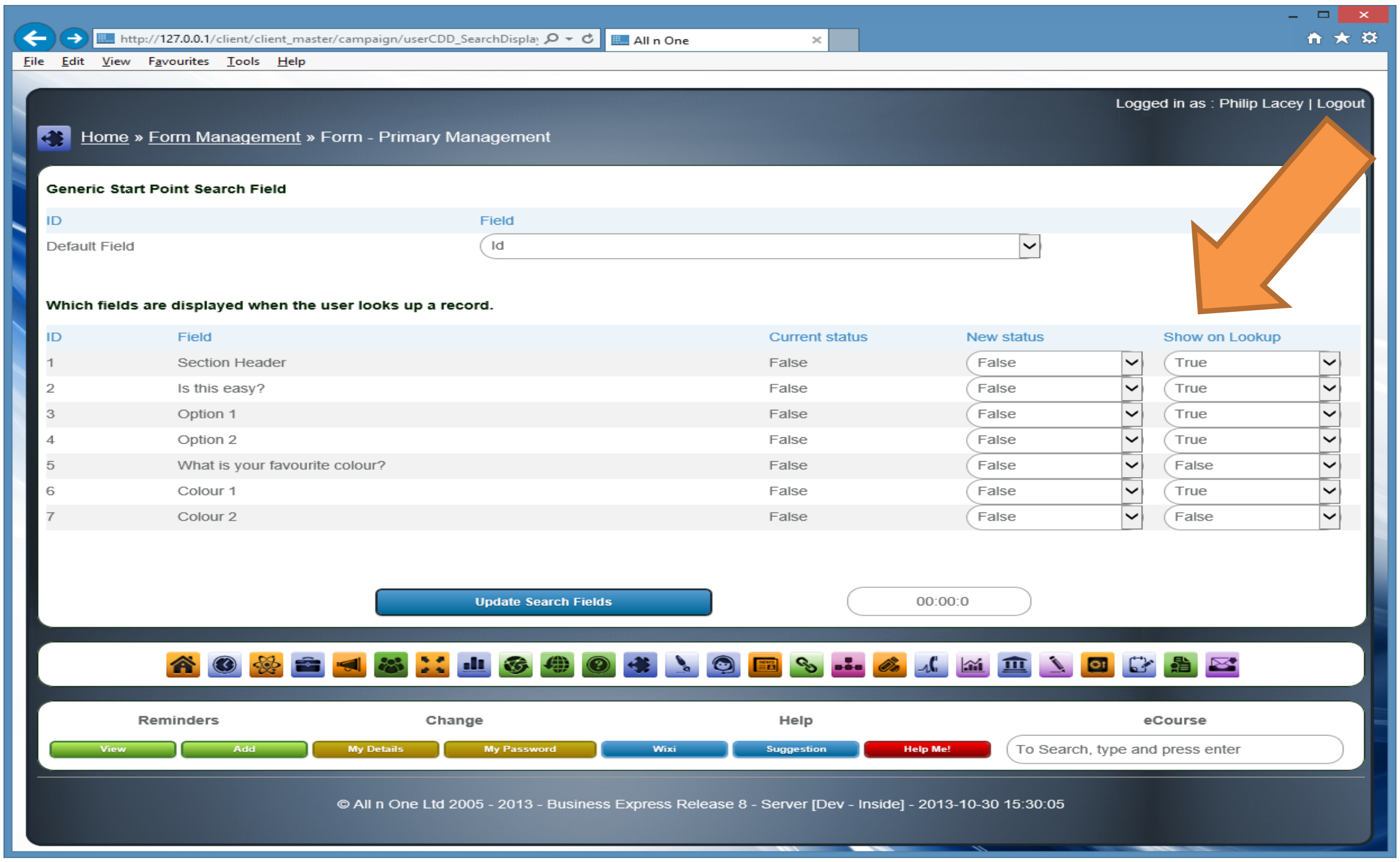
3.8 Lookup field display (New Feature)

BE can now readily show or hide easily questions and to make it easier to customise the lookup screen, search fields can now be specified, a function that previously required custom JavaScript. This is managed through *Search Displayed Fields* and limits which fields are presented to the user to search by.



For more information
http://www.allnone.ie/wixi/index.php?title=Form_Search_Display_Fields

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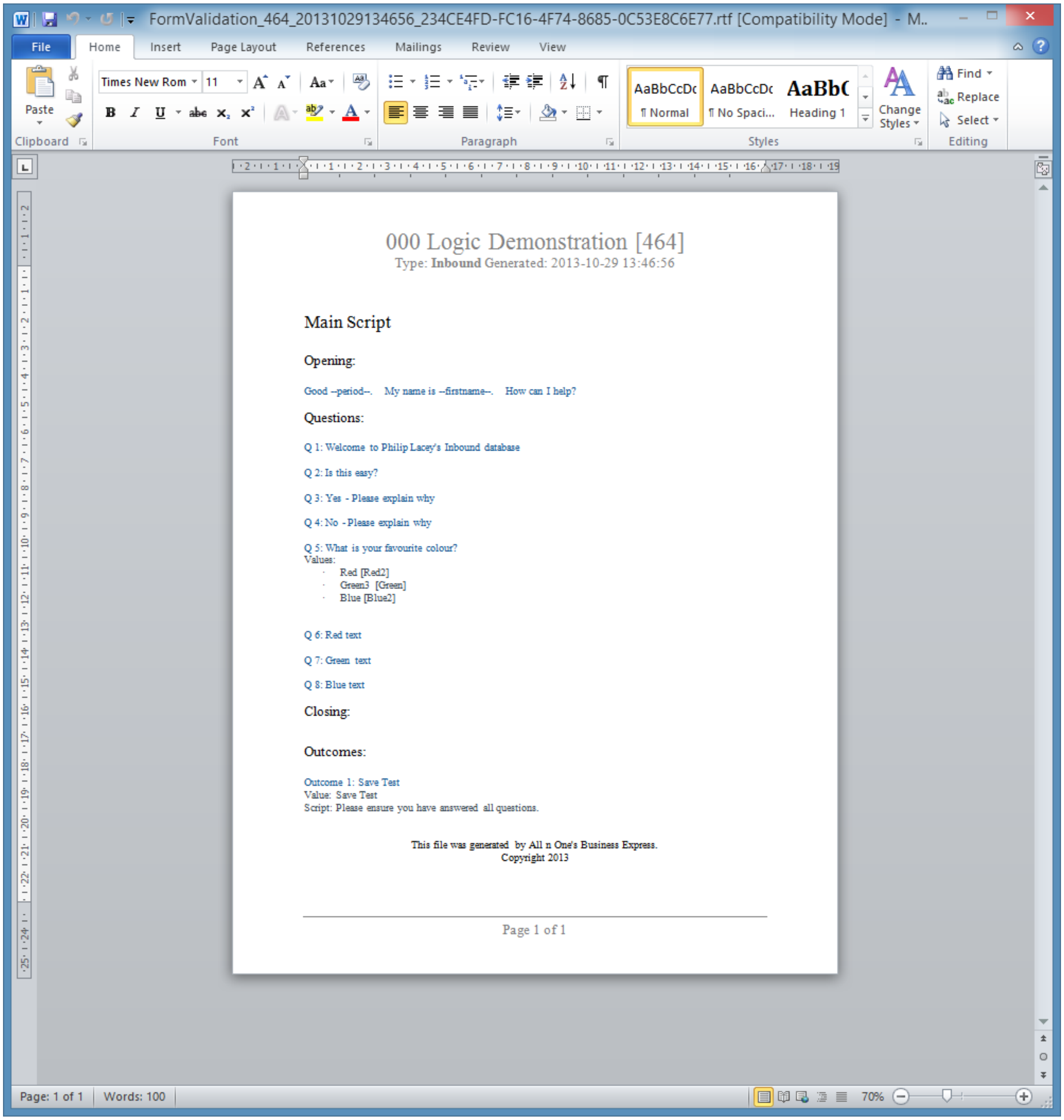
3.9 Form Validation Script (New Feature)

A lot of emphasis has been placed validation to ensure accuracy but it is not always possible to use the BE interface to validate existing scripts within forms, for instance because of drop down lists or logic branches.



FormValidation_464_20131029134656_234CE4FD-FC16-4F74-8685-0C53E8C6E77.rtf [Compatibility Mode] - M..

000 Logic Demonstration [464]

Type: **Inbound** Generated: 2013-10-29 13:46:56

Main Script

Opening:

Good --period--. My name is --firstname--. How can I help?

Questions:

Q 1: Welcome to Philip Lacey's Inbound database

Q 2: Is this easy?

Q 3: Yes - Please explain why

Q 4: No - Please explain why

Q 5: What is your favourite colour?
Values:
- Red [Red2]
- Green3 [Green]
- Blue [Blue2]

Q 6: Red text

Q 7: Green text

Q 8: Blue text

Closing:

Outcomes:

Outcome 1: Save Test
Value: Save Test
Script: Please ensure you have answered all questions.

This file was generated by All n One's Business Express.
Copyright 2013

Page 1 of 1

Page: 1 of 1 Words: 100

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BE can now reproduce a script in a Rich Text Format which is compatible with Microsoft Word. The document that is generated contains the elements of the script that are read or spoken and can be used by a non-BE user to review and correct content.

Using the language and version features of Microsoft Word also makes it easier to manage and track changes and script documents can be generated from any existing form.

The published scripts can also serve as training documents and templates (see 3.2.3).

For more information:
http://www.allnone.ie/wixi/index.php?title=Form_Validation_Script

3.10 Smart Updates from Uploaded File (Updated Feature)

Previously the system only allowed the addition of records from uploaded files but *Smart Update* did not have access to uploaded files. This has been modified to reduce uploading times especially around the resetting of data used during testing.

3.11 Export functionality (Updated Feature)

All Export functionality has been moved to the Data Profiling module to enable complete snapshots to be taken by those responsible for reporting. A new section in Data Profiling has been provided and comparable access will automatically be granted.

3.12 Content Security (Updated Feature)

The ability to grant access to content for numerous types, not just Form, has been moved into System Access Management because if all security issues are managed in one area it's easier to audit security and access permissions.

For ease of access, consoles have been designed to allow entry to the appropriate sections within SAM. Appropriate automatic permission has already been granted to users who previously had security permissions.

Permissions for content by Security Group, by User and for Outcomes has also been moved.

3.13 Data Deletion (Updated Feature)

With all forms centralised in Form Management, a number of different deletion types have been centralised.

Form deletion removes structure and content. *Data deletion* removes content only. The amount of content removed varies by function.

Some former *Data Cleaning* functions caused records to be deleted so any data cleaning function that causes record deletion has also been moved here.

3.14 Data Deletion – Reduction of Records by Grouped Field (New Feature)

For Quality Assurance purposes (5.3) the number of records that are made available to any grouped field (i.e. Agent Name) can be quickly and easily reduced. A worked example would be to load all the calls for a month into the system. We then want 3 records for each agent for QA purposes. This function will easily reduce the amount.

3.15 Data Deletion – Removal of records older than given date (New Feature)

For Data Protection compliance, for specific scenarios, it is important to remove records from the system that have not been interacted with for six months. This new function scans for and deletes records matching the criteria.

4 Module – Case Management (Updated Feature)

4.1 Reporting reorganisation

A number of unfinished and duplicated reports have been reorganised into the Data Profiling module. Case Dashboard is now available in *PreGrouped – Visualisations*.

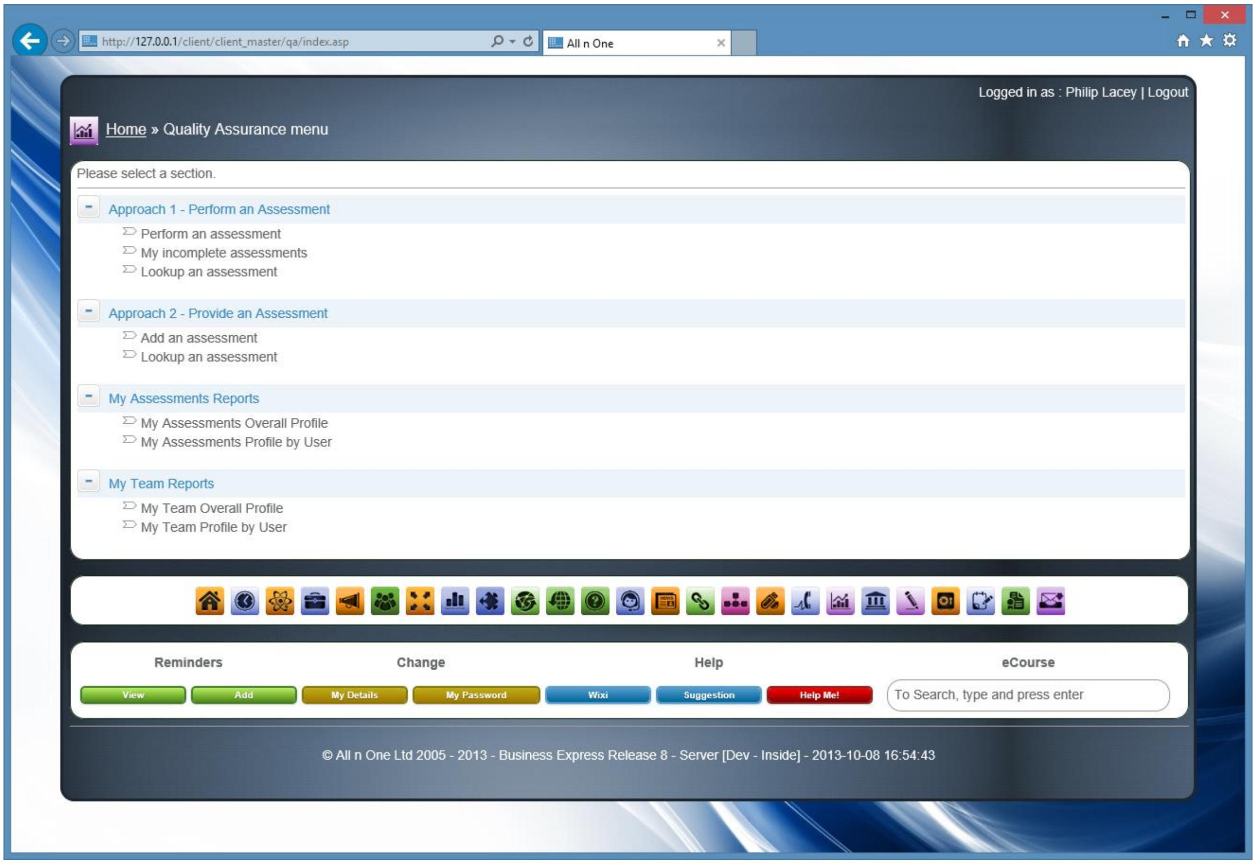
4.2 Social Media contact management dashboard

You can now access the social media dashboard report without having to use the social media dashboard bar and this report is also available in PreGrouped – Visualisations.

5 Module - Quality Assurance (Updated Feature)

5.1 Overview

As part of our Quality Assurance solution, a number of changes have been made to the QA module. For example, BE can now handle answers with no score. A number of tools have been introduced to allow quick addition and management of internal quality assessments and all of this functionality is augmented by MetaData, discussed below.



5.2 Primary Operation

The QA module operates in one of two ways.

Approach 1: A predefined list of checks are loaded to the system.

Approach 2: Users enter records for process.

5.3 Approach 1

Approach 1 - Perform an Assessment is for processing Approach 1. The user is presented with records to perform QA on. *My Assessments Reports* is dedicated to those records managed through Approach 1.

5.4 Approach 2

Approach 2 - Provide an Assessment is for processing Approach 2. The user can enter records for processing and then perform the QA on those records. *My Team Reports* are provided for Approach 2.

5.5 Setup

Form building is managed through Form Management and once the form is created it must have score weightings applied. Once complete, the QA is ready to load records (Approach 1) or be released for record logging (Approach 2).

For the PreGrouped QA form reporting to work automatically it requires two fields specified. A staff field (BE user) and a date / time field. The staff field is used either for logging the QA against the staff member, or as the identifier of who performed the QA. The Date / Time field is used for grouping and, depending on how the grouping in the form is performed; there are a number of reports which can be fed from the field.

Example scenarios:

Call Centre

- Grading agent calls, usually 3 calls per month
- Grading agent interactions, usually 3 interactions per month

General

- External item grading

Where external grading is the scenario, further grouping parameters can be deployed and the reporting tweaked to reflect these parameters.

5.6 Operational Reporting

Reporting is primarily available in the Data Profiling module in *PreGrouped – Scoring*. Team results and reporting are available through the module.

5.7 Total Scoring

Total scoring is based on a question being answered. If no answer is provided the question's score will not be included in the test result. This places emphasis on the correct setup of QA forms.

Consider the following setup

Question	Score
Agent	0
Date / Time	0
Question 1 – Correct opening	10
Question 2 – Inbound only checks	10
Question 3 – Outbound only checks	15
Question 4 – Correct closing	10
Question 5 – Overall opinion	10

On an outbound call, the max score is 45. On the inbound call the max scores is 40. This allows for a number of combinations. Control of the scoring through field validation ensures that the correct questions are answered.

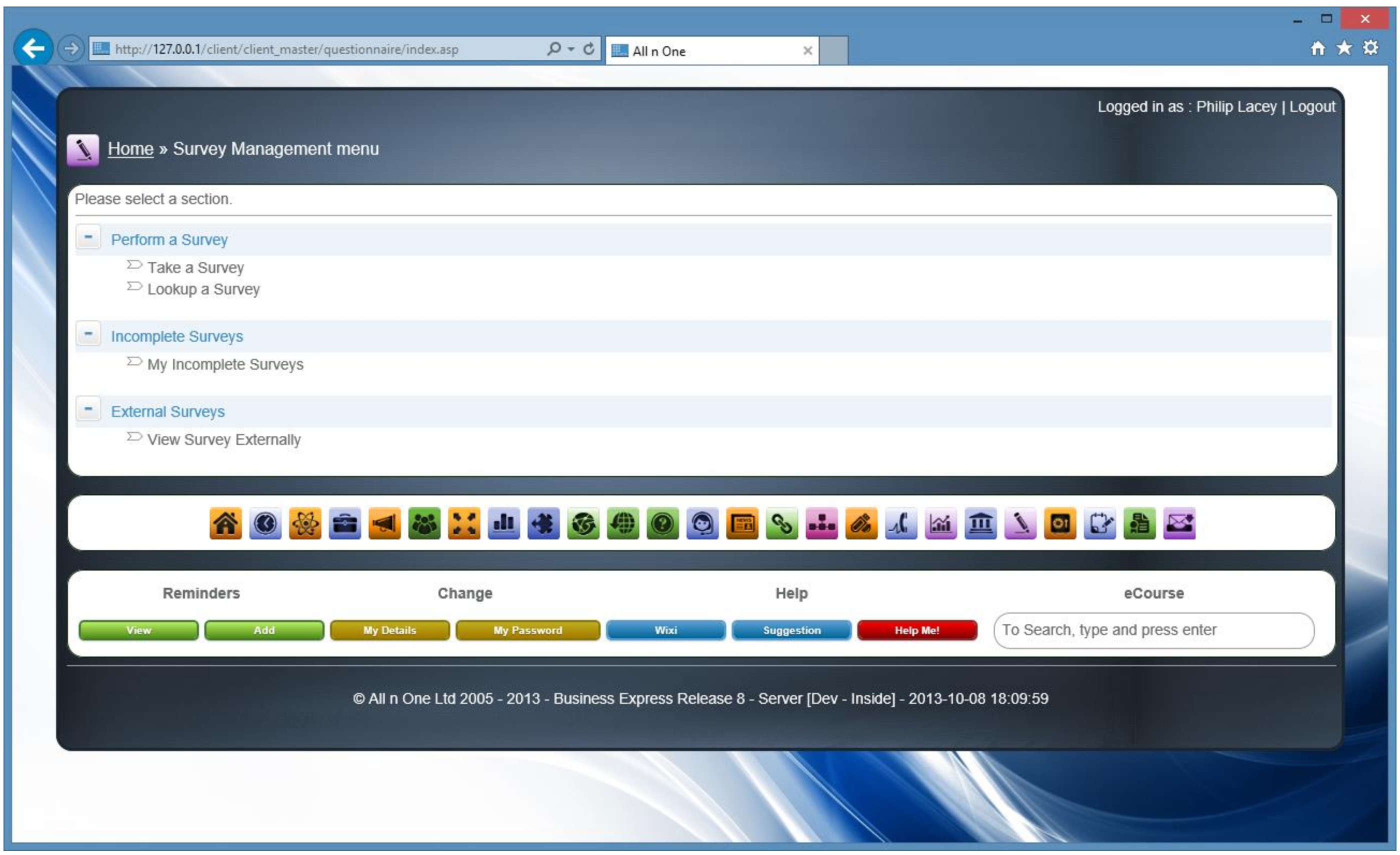
5.8 Combining using MetaData

MetaData allows a number of data sources to feed data into a form. Data sources can be combined such as a clock in/out report, a phone system report, an absentee / illness report. Once processed with a QA report this can provide a complete QA report. These can also be combined to allow easier record management for export to HR systems. MetaData is complex and requires an All n One resource to set up the programs correctly.

6 Module – Survey (New Feature)

6.1 Overview

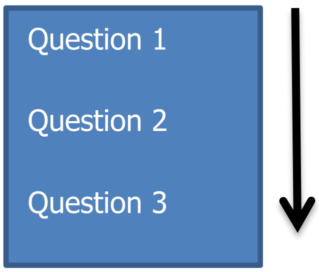
Surveys take many forms and BE offers a broad range of configuration options. The new survey module provides a new way of capturing a record; in short, one question per page.



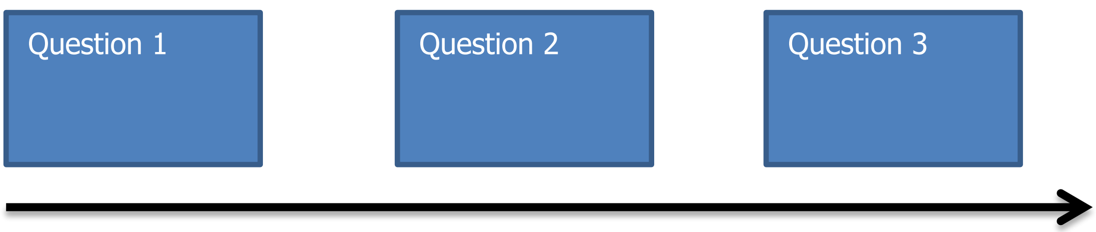
6.2 Single Question View

BE forms are generally designed to process questions, one after another, on a single page so that, for instance, an agent can access a complete record in a single view. For a survey though this is not practical. Presenting fewer, or even one question per page, is preferable. To differentiate between the two, BE uses the terms Vertical delivery and Horizontal delivery.

Vertical delivery is one question after another vertically on the same page.



Horizontal delivery requires one page per question.



Surveys can only be delivery horizontally. It is also possible to put multiple questions on one page.

6.3 Surveys and Delivery

Survey Management module can deliver solutions in a range of ways; to manage a survey and its horizontal delivery, to perform follow up on survey and to have an agent process the record further.

Surveys can also be delivered **externally** to BE. Once complete the survey is treated as a record to be processed through the Outbound Contact module.

6.4 Reporting Options

Data Profiling generates survey reports on Data, Statistics, Scoring and Visualisation.

7 Horizontal Form Delivery (New Feature)

7.1 Setup and Options

7.1.1 Overview

Horizontal delivery has a number of features and options which are only relevant in a horizontal context. They are described below and the modules involved are listed in 1.5.

7.1.2 Progress Bar

This bar shows how far you have progressed through the survey. Progress is non-linear which means that amounts can jump up. The way the bar draws depends on the options chosen.

7.1.3 Logic Jumping

Unlike *logic branching* which shows and hides questions on the same page, horizontal delivery uses *logic jumping* where choosing a given answer will flip the user to the next appropriate question. The setup of this is the same as the logic branching of vertical delivery (3.7).

7.1.4 Per Question Validation

It is possible to force answer selection and indeed the default position is that every question must be answered. Custom logic can be added using the *onchange*, *onclick* and *onfocus* options. Validation is also used to permit blank answers. Note that Logic jump questions cannot be blank

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7.1.5 Question Jumping Bar

This bar is a development tool that helps a survey builder move logically through a survey without the need to restart every time they execute a jump.

7.1.6 Cover page

At the start of the survey it is possible to have a cover page which prevents surveys from being started needlessly and creating a record.

7.1.7 Survey Title

An option to display the title on every page to remind the user which survey they're completing.

7.1.8 Per Question Additional Content

You can now add information to a question such as images or video. This content is only available in the horizontal format.

7.1.9 Asset Drawing

The eCourse Asset engine can be used to provide the content for 7.1.8. Note, this does not require the user to have read permission of the asset.

7.1.10 Back button management

You may not want users to go backwards and it is possible to disable the back button. This is in fact the default position.

7.1.11 Multiple questions per page

It is possible for multiple questions to be displayed on the same page but logic management of the jumping questions will require extensive testing by the BE client before release.

7.1.12 Final comment

An option is provided to allow or prevent a user from leaving a final comment.

7.1.13 URL Obfuscation

It will be possible to reduce and hide the URL of the survey when it is emailed out to users. Note, use of the URL will change the URL back to the full length URLs BE use.

7.2 Internal and External delivery

A horizontal delivery form can be constructed, tested and reviewed using the internal console engine but a number of features need to be turned on to enable the survey to be accessible externally. This is managed in *External Options*.

eCourse reference links are not possible externally can be used displayed internally. External reference links are available internally and externally

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8 Module – Testing Centre (Updated Feature)

8.1 Operational Module

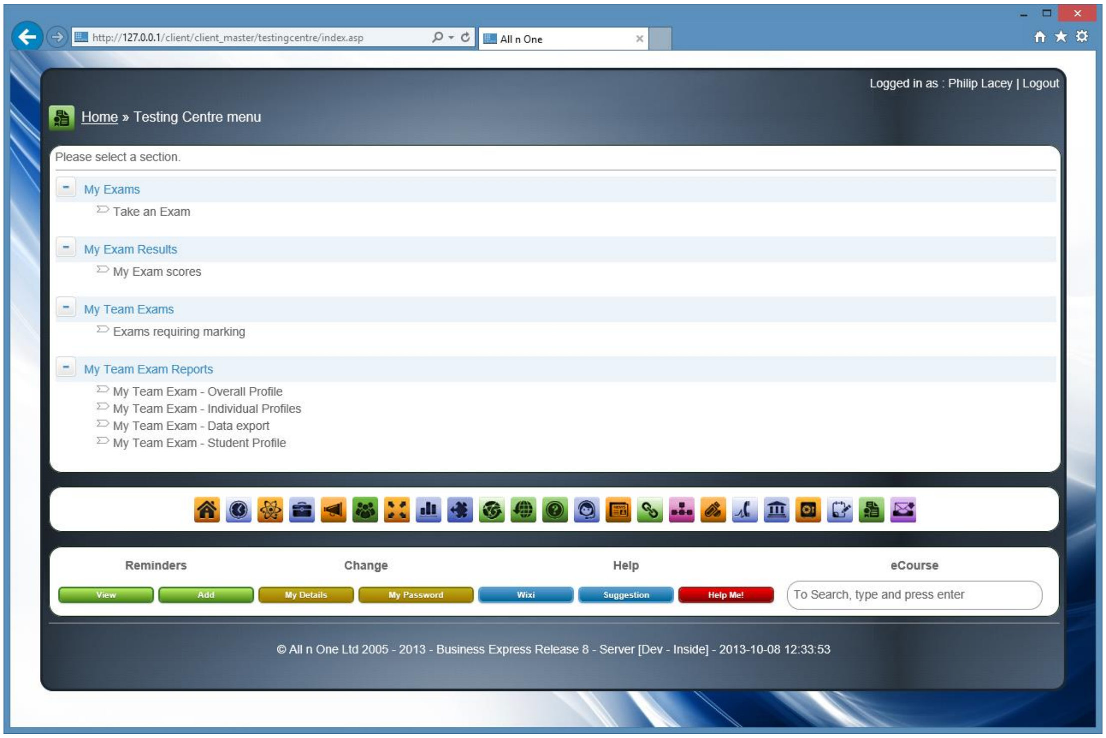
Testing setup, weighting and overall reporting functions have been moved out and are now available through *Form Engine Builder* console.

All overall reporting has been moved to Data Profiling.

A new section has been introduced to separate delivering a test from the results section.

A number of team reports have been introduced to reflect team performance that are in line with the common structure of Team Reporting.

An examination can be delivered vertically or horizontally.



A simpler examination build has been introduced to the main Form Engine

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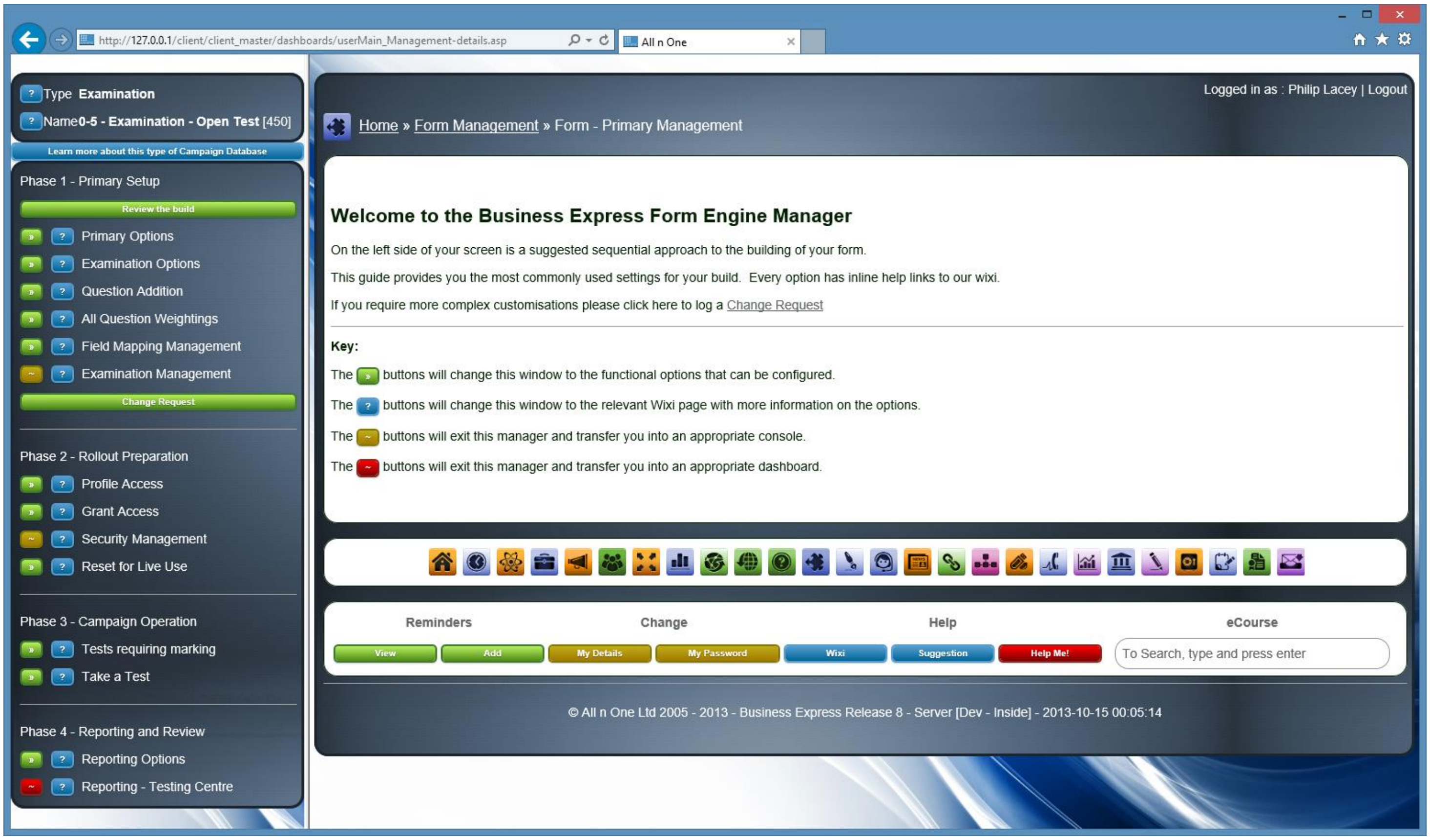

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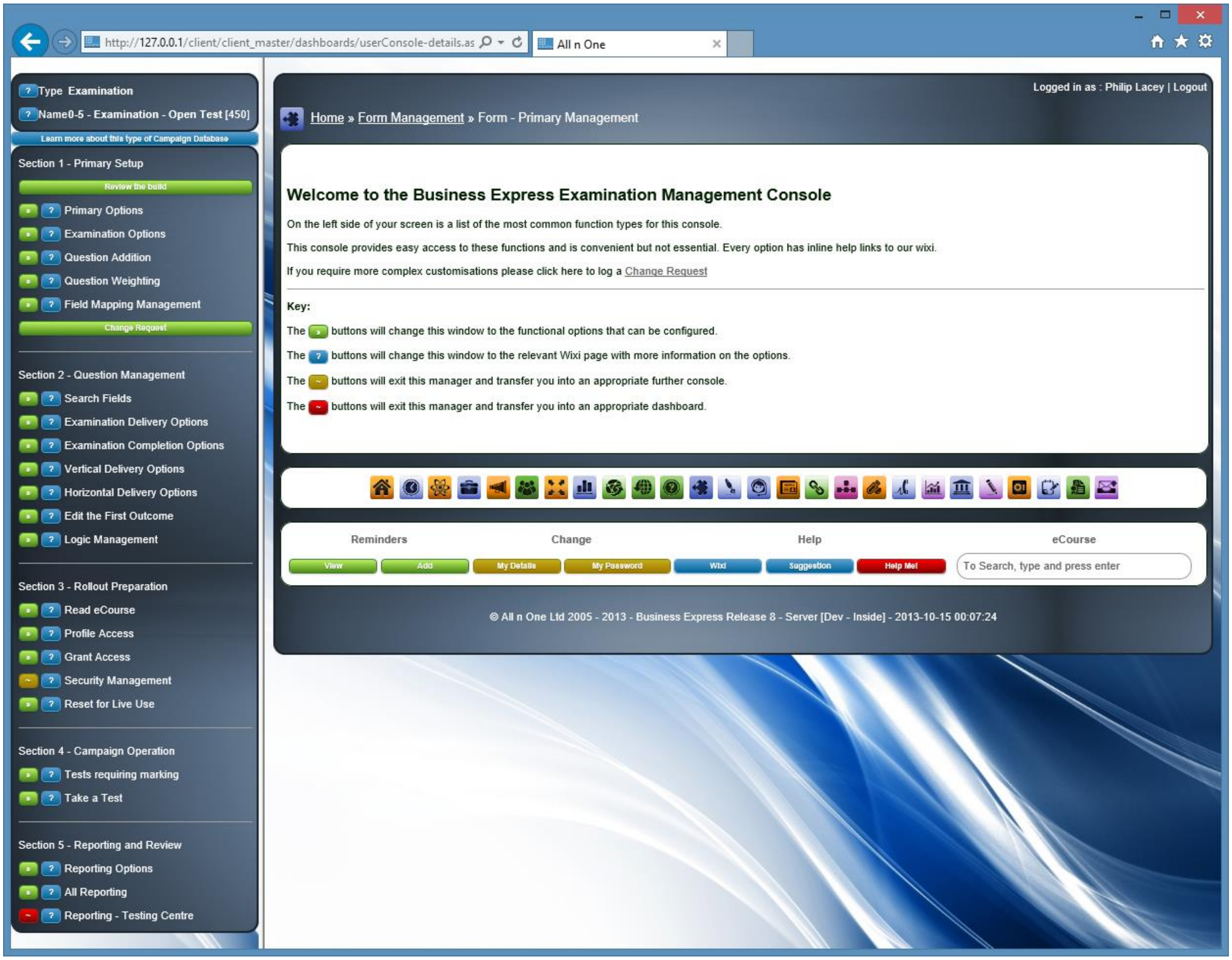
A detailed Examination build is available through *Examination Management*.



8.2 Form Management

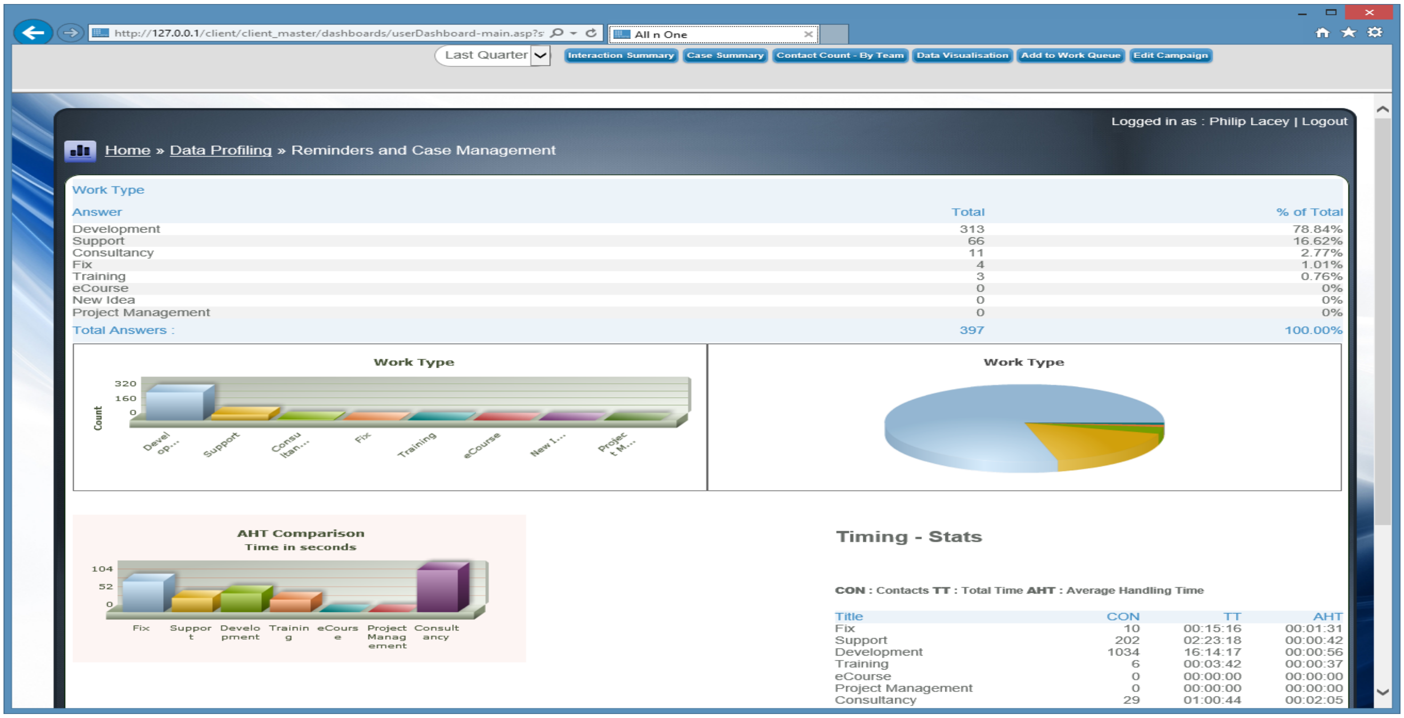
Section 3 in form management has been changed from *Question Weighting* to *Scoring Management* to reflect a broader scope. Scoring functions have been moved to this section whilst deleting testing records is available in *Data Deletion*. The console provides access to the functionality previous available in *Testing Centre*.

8.3 Data Profiling

The overall scoring reports have been moved into *PreGrouped – Scores*.

8.4 Dashboard

There is a new Testing Centre dashboard available that will centralise and simplify reporting.



8.5 New Console

The new Testing Centre console will centralise and simplify the building and management of any Examination.

8.6 Horizontal Exams

8.6.1 Overview

Examination too, can now be delivered horizontally or vertically as required. They must be one or the other so a number of features have been updated which affect both.

8.6.2 8.6.2 Common functionality.

Results can be displayed or withheld for both types and it is also possible to lock to *Once Only* for both. The timing of tests is possible on both methods but user perception of each will vary. They each display a countdown but internet speed can affect performance in the horizontal format. Results will always be displayed vertically and there is an option which allows the answers to be reviewed.

8.7 Document Upload & Scoring

It is now possible to upload a document and have it scored. Scoring, results and management are treated as an open question examination.

8.8 eCourse Access Granting on Test Passing

It possible to grant read access to an eCourse when an examination has been passed. This will allow for learning paths to be developed that can be accessed sequentially as tests are passed.

9 Consoles and Dashboards

9.1 Consoles

9.1.1 Overview

Consoles are collections of functionality around specific scenarios. Each is designed to help intermediate to advanced users to perform their tasks effectively. Below we describe the scenarios for which each console is built.

9.1.2 Console – Question Management

Applies to: All Form Types

Building forms requires questions and answer values to be added and edited. Question field mapping must also be performed as must outcome management.

9.1.3 Console – Outbound Operation Management

Applies to: Outbound, Blended, Case Management, Quality Assurance

In instances where a list of records (database) needs to be processed, there are a number of common functions. Viewing record status, choosing which records the team should process, loading more records and generating data dumps are all part of the processing. This console makes these functions simple and centralised.

9.1.4 Console – Scored Form Operation

Applies to: Examination, Survey, Quality Assurance

The Examination console has the functions required to deliver any scored Form type.

9.1.5 Console – Blended and Case Operation Management

Applies to: Blended, Survey, Case Management

All records, from whatever source, must be queued up for follow up. Operational management of records in a constant state of change requires real-time reporting and efficient functional support. This console provides the tools you need to do just that.

9.1.6 Console – Security

Applies to: All of BE

Any user in the system needs functional and content access. This console manages user modification and profiling.

9.1.7 Console – eCourse

Applies to: eCourse, eCourse Management and Testing Centre

9.1.8 Console – MetaData

Applies to: MetaData

This console provides a sequential and structured approach to MetaData program development.

9.2 Reporting Dashboards

Reporting Dashboards collate existing reports into a simple to use overhead bar to allow quick access to reports throughout the system, relevant to a specific role. A number of roles have been identified.

- Reporting – Security
- Reporting – eCourse

- Reporting – Inbound
- Reporting – Outbound
- Reporting – Blended
- Reporting – Case Management
- Reporting – Quality Assurance
- Reporting – Survey
- Reporting – Testing Centre

10 Module – Data Profiling (Updated Feature)

10.1 Understanding Reporting

There is now available extensive documentation on the reporting available in Business Express. This document is called "BE Whitepaper - Understanding Business Express Form Reporting" and is available from the Wixi

http://www.allnone.ie/wixi/index.php?title=Form_Reporting

10.2 Customised Statistics Report and Calculations

We have received a number of requests to provide a single sheet with a number of key statistics on the same page. The variety of these requests has made it a challenge to centralise how the solution is accomplished. The solution implemented by BE is to allow calculations to be set up. Each calculation can create a single statistic figure or a group of figures. These calculations can be grouped up into a report. The single page report then displays all the calculations as required.

This requires some new admin options which have been added to the "Customised – Group Management" section. The delivery of the reports is done through "Customised- Statistics" section.

Full details of this new functionality and its setup is available through an external document XXXX

10.3 Section changes

The largest change sees the wording of "PreGrouped" changed to "Instant" and the word "Grouped" has been changed to "Customised". This is to better reflect the meaning of the groups of reports.

"System – Dashboards" has been renamed to "Instant – Dashboards"

"Reminders and Case Management" has been renamed to "Instant – Reminders and Case Management"

A new section has been added "Instant – Export" which represents the full data export functionality that was previously in Form Management

The order of the sections has also been updated to:

- Instant - Dashboards
- Instant - Data
- Instant - Statistics
- Instant - Scores
- Instant - Visualisations
- Instant - Reminders and Case Management
- Instant - Export

- Customised - Management
- Customised - Data
- Customised - Data - Filtered
- Customised - Statistics
- Customised - Scores
- Customised - Visualisations

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10.3.1 Instant – Dashboards

"Campaign – Status" has changed to "Dashboard - Record Status"

"Campaign – Profile" has changed to "Dashboard - System Information"

"Manual IW Lock Release" has changed to "Integrated Warehousing - Manual Lock Release"

A new item has been added "Dashboard – All Forms" which shows the dashboard of report appropriate to the type of form selected. The types available are listed in 9.2

Explanations of the reports is available from "BE Whitepaper - Understanding Business Express Form Reporting" as detailed in 10.1

Two items that were previously in Group – Management, have been moved in. This allows for Customised Groups to be used to create work lists and also cross linked data record management easily. The titles have been changed for consistency:

"Worklist - Control Bar Button" = "Control Bar Button - Cross Linked"
"CrossLinked - Control Bar Button" = "Control Bar Button - Work List"

The items have been reordered as follows:

> ** Dashboard - All Forms
> ------------------------------
> Dashboard - Record Status
> Dashboard - System Information
> ------------------------------
> Integrated Warehousing - Manual Lock Release
> ------------------------------
> Control Bar Button - Cross Linked
> Control Bar Button - Work List

10.3.2 Instant – Data

Two reports have been moved to "Instant - Reminders and Case Management":

- "Cases Timing"
- "Cases – Still out"

For consistency the names of a lot of the reports have been updated. The title of the reports that have changed

- "Data - Report by Period, by Outcome" = "Data - Data - Report by Period, by Outcome"
- "Data - Unique Data Records - Report by Period, by Outcome" = "Data - Data - Unique Data Records - Report by Period, by Outcome"
- "Data - Report by Period, by Outcome, by Agent" = "Data - User - Report by Period, by Outcome, by User"
- "Data - All records by Agent for all Campaigns" = "Data - User - All records for all Forms - Report by Period by User"

The menu previously was

Data - Report by Period, by Outcome
Data - Unique Data Records - Report by Period, by Outcome
Data - Report by Period, by Outcome, by Agent

Data - Cross linked interactive report

Cases Timing
Cases - Still Out

Data - All records by Agent for all Campaigns
Raw Data - Report by Period, by Outcome

The items have been reordered as follows:

Data - Data - Report by Period, by Outcome
Data - Data - Unique Data Records - Report by Period, by Outcome
----
Data - User - Report by Period, by Outcome, by User
Data - User - All records for all Forms - Report by Period by User
----
Data - Cross linked interactive report

Data - Raw Data - Report by Period, by Outcome

10.3.3 Instant – Statistics

For consistency the names of a lot of the reports have been updated. The title of the reports that have changed

- "Agent - Weekly Report" = "Statistics - User - Report by Week"
- "Agent - Report by Period" = "Statistics - User - Report by Period"
- "Data - Weekly Report" = "Statistics - Data - Report by Week"
- "Data - Report by Period" = "Statistics - Data - Report by Period"
- "Contact Duration - By Period" = "Statistics - Display Duration - Report by Period"
- "Grouped Outcome - Report by Period" = "Statistics - Grouped Outcome - Report by Period"

The word "Contact Duration" was changed to "Display Duration" to reflect the broader scope of the reporting.

The menu previously was

Agent - Weekly Report
Agent - Report by Period

Data - Weekly Report
Data - Report by Period

Contact Duration - By Period
Grouped Outcome - Report by Period

To improve the consistency of the order of items in the various reporting sections, data is presented before agent limited reports. For this reason the order of the section is now:

Statistics - Data - Report by Week
Statistics - Data - Report by Period

Statistics - User - Report by Week
Statistics - User - Report by Period

Statistics - Display Duration - Report by Period

Statistics - Grouped Outcome - Report by Period

10.3.4 Instant – Scores

Scored records are applicable to Testing Centre, Quality Assurance and Survey records.

There are two key reports from the Testing Centre now available in this section. Previously in the testing centre the scored reports were

- Exam - Overall Profile
- Exam - Individual Profiles
- Exam - Data export
- Exam - Student Profile

Overall Profile is available in the "Instant – Visualisations" section as "Visualisation – Current Status"
Data Export is available in the "Instant – Export" section as "Export – All CDA Data"

"Exam - Individual Profiles" has become "Scores – Individual Profiles"

"Exam - Student Profile" has become "Scores – User Profile"

10.3.5 Instant – Visualisations

The previous menu of:

Dashboard - Current Status
Dashboard - Period Analysis

Contact Pattern

Has been renamed to:

Visualisation - Current Status
Visualisation - Status by Period Analysis

Visualisation - Contact Pattern

10.3.6 Instant – Reminders and Case Management

There were two Case Management based reports in the Data section which have been moved to this more appropriate section.

The previous menu of:

Reminders - By Campaign
Reminders - By Period
Reminders - By Individual

Case Reporting - Open Cases
Case Reporting - Exception Cases

Case Reporting - ReOpened Cases

Case Reporting - All Cases
Case Reporting - All Cases - Case Report Format

Have been renamed to:

Reminders - By Form
Reminders - By Period
Reminders - By Individual

Case Management - Open Cases
Case Management - Exception Cases

Case Management - ReOpened Cases

Case Management - All Cases
Case Management - All Cases - Case Report Format

Case Management - Cases Timing Report
Case Management - Still Out Report

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10.3.7 Instant – Export

The previous Form Management menu of Database – Data Export of:

Create Data Archive - Complete (Data Only)
Create Data Archive - By Period (Data Only)
Create Data Archive - Custom Output (Data Only)

Custom Data Output - Data File - Complete
Custom Data Output - Data File - By Period

Create Business Express Archive (Data and Contact History)

Have been renamed to:

Export - CDAs - Complete
Export - CDAs - By Period
Export - CDAs - Complete - Field Limited

Export - CDAs - Custom Data Output - Complete
Export - CDAs - Custom Data Output - By Period

Export - Create Business Express Archive (All CDA and CCL Data)

10.3.8 Customised - Group Management

The previous section of “Group – Management” has been changed to “Customised - Group Management”

The new custom statistics report as detailed in 10.2 is now part of the menu.

The previous menu of:

Create Group

Edit a Group - Primary Details
Edit a Group - Users
Edit a Group - Outcomes
Edit a Group - Fields and Sequence
Edit a Group - Grouping Parameters
Edit a Group - Rolling Totals Settings
Edit a Group - Cross Linked Campaign Engine Settings

Delete a Group

Select filter fields

Worklist - Control Bar Button
CrossLinked - Control Bar Button

Have been renamed to:

Group - Create

Group - Edit Primary Details
Group - Edit limit by Users
Group - Edit limit by Outcomes
Group - Edit Fields and Sequence
Group - Edit Grouping Parameters
Group - Edit Rolling Totals Settings
Group - Edit Cross Linked Campaign Engine Settings

Group - Delete Group

Group - Customised Data Filtered - Select filter fields

** Statistics Calculation - Add
** Statistics Calculation - Edit
** Statistics Calculation - Delete

** Statistics Report - Add
** Statistics Report - Edit
** Statistics Report - Delete

10.3.9 Customised - Data

The previous section of "Group - Data" has been changed to "Customised - Data"

The previous menu of:

Data Report - All Contacts - By Group

Has been renamed to:

Customised - Data - All Contacts - By Group

10.3.10 Customised - Data - Filtered

The previous section of "Group - Data - Filtered" has been changed to "Customised - Data - Filtered"

The previous menu of:

Data Report - All Contacts - By Group - With Filter

Has been renamed to:

Customised - Data - All Contacts - By Group with Filter

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10.3.11 Customised - Statistics

The previous section of "Group - Statistics" has been changed to "Customised - Statistics"

The new report delivery detailed in 10.2 is now available in this section as well.

The previous menu of:

> Rolling Totals - All Contacts
> Rolling Totals - First Contact Only
> ------------------------------
> Sum Totals - All Contacts
> Sum Totals - First Contact Only
> ------------------------------
> Outcome Totals - Last Contact - All Periods
> ------------------------------
> Case Management - Status Reporting

Has been renamed to:

> ** Customised - Statistics - Custom Statistics Report
> ------------------------------
> Customised - Statistics - Rolling Totals - All Contacts
> Customised - Statistics - Rolling Totals - First Contact Only
> ------------------------------
> Customised - Statistics - Sum Totals - All Contacts
> Customised - Statistics - Sum Totals - First Contact Only
> ------------------------------
> Customised - Statistics - Outcome Totals - Last Contact - All Periods
> ------------------------------
> Customised - Statistics - Case Management - Status Reporting

10.3.12 Customised - Scores

The previous section of "Group - Scores" has been changed to "Customised - Scores"

The previous menu of:

Data - Grouped Assessments

Has been renamed to:

Customised - Scores - Data - Grouped Assessments

10.3.13 Customised - Visualisations

The previous section of "Group - Visualisations" has been changed to "Customised - Visualisations"

The previous menu of:

Data Profiling - By Group

Has been renamed to:

Customised - Visualisation - Status by Group

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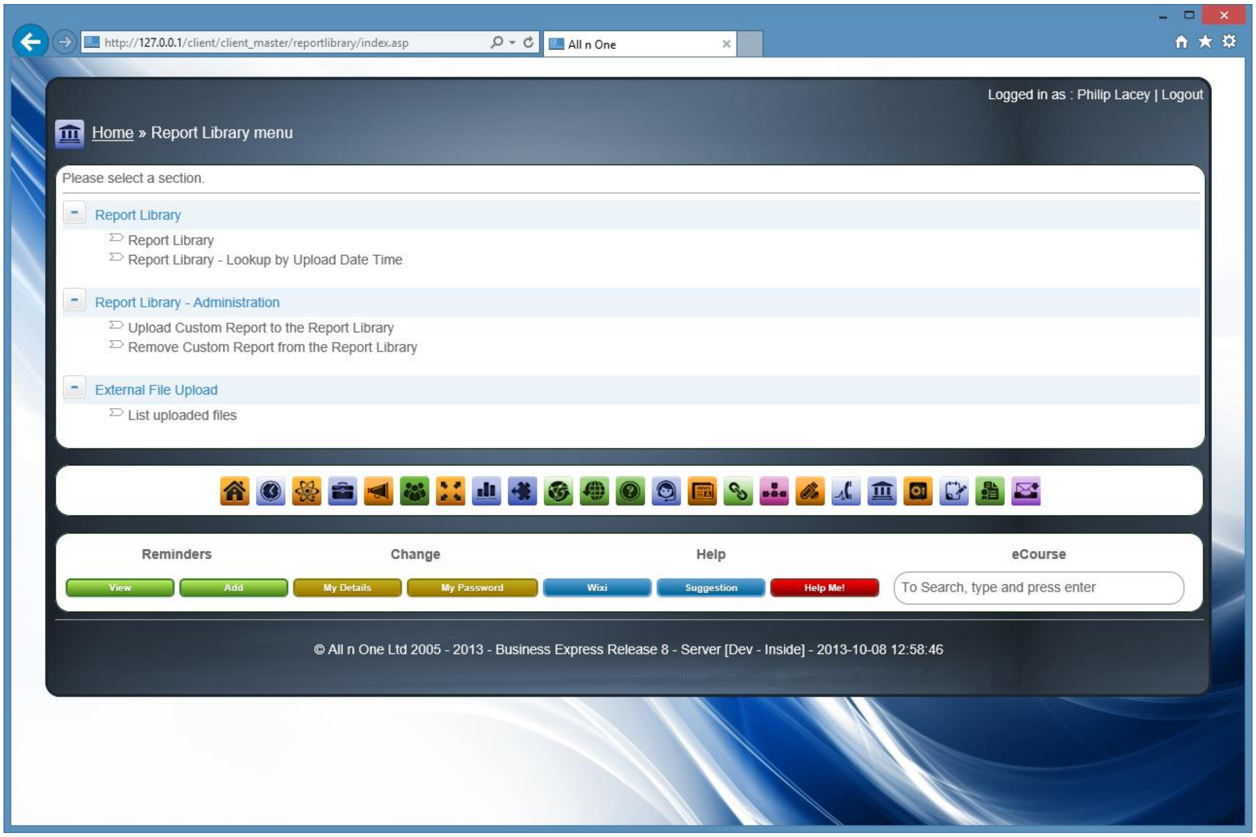
11 Module – Report Library (Updated Feature)

11.1 External Uploaded File Extension

It is possible to upload files from outside BE and these files will appear in the External File Upload section. This allows remote users to input files and reports to BE from various sources, securely, through a web browser. SFTP access to this area is also possible.



12 WordPress Plug In

One of the most requested new features was enabling external access to data held in BE. The BEAPI which is the new name for the CMI API, enables data from within BE to be made available externally in a secure way.

Around 70 million websites now use WordPress so to speed up integration we have developed a plugin for WordPress as well as numerous code examples for different ways of using BE with WordPress.

The latest version of the BEAPI will contain complete details of how this code is used and how BE can be integrated with external solutions.