

AFO 434 – Contact management

434.1 Introduction

This AFO allows for the registration of “contacts” with borrowers. These contacts can be face-to-face, by telephone, via email, via letters, or through any other type of communication. The contacts may be of multiple types. The contacts can be registered only, but can also lead to follow-on actions that need to be taken.

This AFO is used to register visits, meeting attendance, complaints, questions or any other type of “contacts” between the borrower and the library.

Contacts are registered as contact events, which can consist of one or more contact incidents. As such a contact event has a two level structure: (1) the main contact event level, and (2) the contact instance level. The second level is repeatable.

The main contact event level contains the information that describes the event *in general*. Properties on this level are: status, category, description, etc. The contact instance level contains information for each subsequent contact related to the main contact event (e.g. each incident that is related to the contact event). In other words: the contact instance level is a chronological string of contacts related to the initial contact event.

The system following functionality is supported:

- ability to register a contact and the associated “incidents”
- storage of emails and documents
- a tracking system for follow-up of actions
- a reporting function to extract events
- email capabilities

This functionality can be accessed via AFO 431 with the option **Contact events**, in which case only information for that particular borrower is displayed. Alternatively the functionality can be accessed via AFO 434, in which case information for all borrowers with contact events is available as well as the option to add events for new borrowers.

The parameters related to this functionality are set in AFO 482 – Contact Management Parameters.

434.2 Managing contact events

After selecting this AFO an overview screen will be displayed:

The screenshot shows the V-smart application interface. At the top, there is a navigation bar with the V-smart logo and user information: Id: 1.23001/6860, User: Tineke, Location: PNB/BD, AFO: 434. Below the navigation bar is a toolbar with various icons for navigation and actions. The main content area displays an overview of contact incidents for all borrowers. The table below represents the data shown in the screenshot.

No.	Borrower id	Borrower name	Contact incident id	Subject	Status	Priority	Type	Category	Creation date	Due Date	Owner	Events
1	20062155	Sop, John	11	recieved damaged	Opened	High (1)	General remark	Damaged book	31/08/2009 - 18:36	31/08/2009	Deb MacLeod@VSQAMain	1
2	20062178	van Naamen, Raymond	1	Test event	Opened	High (1)	Malfunction	CD damaged	23/07/2009 - 12:59	24/07/2009	Raymond	3
3	900024441	Walker, Huw	10	KEW test	Opened	High (1)	Customer complaint	Wrong Contents	24/08/2009 - 14:13	24/08/2009	Katharine Walker	0
4	17426	Maas, H.J.M	4	DVD is the wrong DVD	Opened	High (1)	Malfunction	DVD not received	23/07/2009 - 15:41	23/07/2009	Deb MacLeod@VSQAMain	1
5	00020867	Jansen, A.E.M.	13	onderwerp	INT	High (1)	Customer complaint	Never got the book	19/10/2009 - 16:27	19/10/2009	Tineke	1
6	200200121X	macleod, 211b4 in dutch	15	Compains about hours open	Opened	Low (3)	Customer complaint	Damaged book	09/11/2009 - 18:47	09/11/2009	Deb MacLeod@VSQAMain	0
7	200200141X	macleod vsqa	12	Gala ticket request	Closed	High (1)	Gala	Wrong Contents	01/09/2009 - 21:20	02/09/2009	Deb MacLeod@VSQAMain	2
8	201	MacLeod, Alice	14	Note for statistics	NNN	Low (3)	General remark	StoryTime participant	22/10/2009 - 16:38	22/10/2009	Deb MacLeod@VSQAMain	1
9	201	MacLeod, Alice	9	Wrong Contents again	Opened	High (1)	Customer complaint	Wrong Contents	24/07/2009 - 12:08	31/07/2009	Super User (vgg)	1
10	201	MacLeod, Alice	8	Test Infor	Opened	High (1)	Customer complaint	Damaged book	24/07/2009 - 10:08	24/07/2009	Super User (vgg)	0
11	201	MacLeod, Alice	7	Test Infor	Opened	High (1)	Customer complaint	Damaged book	24/07/2009 - 10:06	24/07/2009	Super User (vgg)	0
12	201	MacLeod, Alice	6	Test Infor	Opened	High (1)	Customer complaint	Damaged book	24/07/2009 - 10:06	24/07/2009	Super User (vgg)	0

Options on the screen

New contact incident: Use this option to add a new contact incident for a borrower. See section 434.2.1.

Select contact incident: Select a line and then this option to view the events for the selected incident. See section 434.3.

Borrower maintenance: Select a line and then this option to view the details of the selected borrower. The AFO 431 screen will be displayed.

Change general properties: Select a line and then this option to view/modify the general properties. See section 434.2.2.

Filter: Use this option to limit the display to certain criteria. See section 434.2.3.

Incident related documents: Select a line and then this option to view documents related to the selected incident. See section 434.4.

Incident related emails: Select a line and then this option to view emails related to the selected incident. See section 434.4.

Borrower related emails: Select a line and then this option to view emails related to the selected borrower. See section 434.4.

Non-related emails: Select this option to view non-related emails (i.e. emails that are not attached to a specific incident or borrowers). See section 434.4.

434.2.1 Add new contact incident

New contact incident: Use this option to add a new contact incident for a borrower. After selecting this option the advanced search form for identifying a borrower is displayed. After selecting a borrower an input form will be displayed:

Tab Common

The screenshot shows a web form titled "Input a new contact incident" with a light green background. At the top left, there are two tabs: "Common" (selected) and "Related info". The form contains the following fields:

- Contact incident id: 16
- Subject: (empty text box)
- Status: Opened (dropdown menu)
- Category: Damaged book (dropdown menu)
- Owner: Tineke (dropdown menu)
- Description: (empty text area)
- Priority: High (1) (dropdown menu)
- Type: Customer complaint (dropdown menu)
- Due date: 11/12/2009 (text box with a calendar icon)

On the right side of the form, there are three buttons: "OK", "Cancel", and "Help".

Fields on the form

Incident contact id.: A protected field containing the automatically assigned sequence number of the incident.

Subject: A brief description of the incident.

Status: A protected field containing the automatically assigned status (which initially is "Opened").

Category: Select a category (defined in AFO 482 – Contact Management Parameters) from the dropdown list.

Owner: This defaults to the login ID of the person creating the incident, but another ID can be selected from the dropdown list.

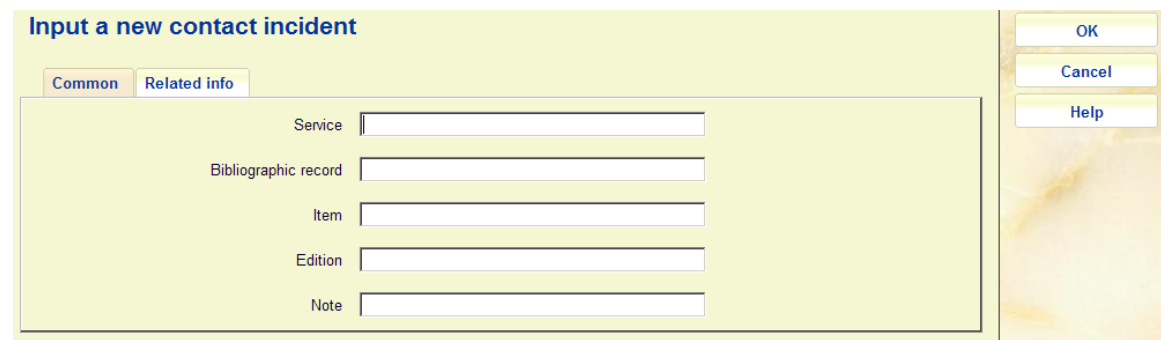
Description: A free text message related to the incident.

Priority: Select a priority (defined in AFO 482 – Contact Management Parameters) from the dropdown list. By default, the incident priority is derived from the Incident Type.

Type: Select a type (defined in AFO 482 – Contact Management Parameters) from the dropdown list. By default the first type in the list (alphabetically) is shown.

Due date: Date and Time when the incident should be closed.

Tab Related info



The screenshot shows a web form titled "Input a new contact incident". At the top, there are two tabs: "Common" and "Related info", with "Related info" being the active tab. Below the tabs, there are five text input fields, each with a label to its left: "Service", "Bibliographic record", "Item", "Edition", and "Note". To the right of the form, there are three buttons: "OK", "Cancel", and "Help".

Fields on the form

These are free text fields that can be used for reporting purposes (via SSP).

434.2.2 Change general properties

Change general properties: Select a line and then this option to view/modify the general properties. After selecting a this option an input form will be displayed:

Tab Common

General properties of contact incident 10

Common Related info

Contact incident id: 10

Subject: KEW test

Status: Opened

Category: Wrong Contents

Owner: Katharine Walker

Description: See attached document

Priority: High (1)

Type: Customer complaint

Due date: 24/08/2009

OK
Cancel
Help

Fields on the form

Incident contact id.: A protected field containing the automatically assigned sequence number of the incident.

Subject: A brief description of the incident.

Status: A field containing the current status. You can change this by selecting another status (defined in AFO 482 – Contact Management Parameters) from the dropdown list.

Category: Select a category (defined in AFO 482 – Contact Management Parameters) from the dropdown list.

Owner: You can select a user ID from the dropdown list.

Description: A free text message related to the incident.

Priority: Select a priority (defined in AFO 482 – Contact Management Parameters) from the dropdown list.

Type: Select a type (defined in AFO 482 – Contact Management Parameters) from the dropdown list.

Due date: Date and Time when the incident should be closed.

Tab Related info

General properties of contact incident 10

Common Related info

Service

Bibliographic record

Item

Edition

Note

OK

Cancel

Help

Fields on the form


These are free text fields that can be used for reporting purposes (via SSP).


434.2.3 Filter



Filter: Use this option to limit the display to certain criteria. An input form will be displayed:



V-smart [2.0.01] -- Webpage Dialog



Filter


Incidents from 


Contact incidents to 


Status  


Type  



Category  


Incidents due date from 

Incidents due date to 

Events due date from 

Event due date to 

Owner  

Customer 

Words from contact incident description

Words from documents/emails

Save settings

OK

Cancel

Help

Clear all

http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001 Local intranet

After a filter has been applied, the filter information will be displayed in the header portion of the screen:

Contact incidents from/to date	01/01/2009 - 31/12/2009
Contact incidents with type	Customer Request
Contact incidents from/to due date	01/01/2009 - 31/12/2009
Events from/to due date	01/01/2009 - 31/12/2009

Please note

A filter stays in effect until you remove it with the **Clear all** button, even when you leave the AFO and come back later.

434.3 View / modify contact incident

Select contact incident: Select a line and then this option to view the events for the selected incident. An overview screen will be displayed:

The screenshot shows the V-smart application interface in a Windows Internet Explorer browser window. The title bar reads "V-smart [2.0.01] - Windows Internet Explorer". The interface includes a navigation bar with a logo, user information (Id: 1.23001/6860, User: Tineke, Location: PNB/BD, AFO: 434), and buttons for "Settings" and "Exit". Below the navigation bar is a toolbar with various icons. The main content area displays the following details for a contact incident:

Borrower id	200399040X
Borrower name	MacLeod, Alice
Contact incident id	9
Contact incident subject	Wrong Contents again
Contact incident status	Opened
Contact incident category	Wrong Contents
Contact incident owner	Super User (vgg)
Owner next event	Super User (vgg)

Below the details is a section titled "Overview events for contact incident 9" containing a table with the following data:

No.	Event id	Action by	Date	Description	Contact method	Next event owner	Next event due date
<input type="checkbox"/>	1 1	Super User (vgg)	22/09/2009	Call back	Phonecall	Super User (vgg)	31/07/2009

The browser status bar at the bottom shows "Done", "Local intranet", and a zoom level of "100%".

Options on the screen

New event: Use this option to add a new contact event for a borrower. See section 434.3.1.

Select event: Select a line and then this option to view information for the selected event. See section 434.3.2.

Borrower maintenance: Select this option to view the details of the current borrower. The AFO 431 screen will be displayed.

Change general properties: Select a line and then this option to view/modify the general properties. See section 434.2.2.

Related documents: Select this option to view documents related to the current incident. See section 434.4.

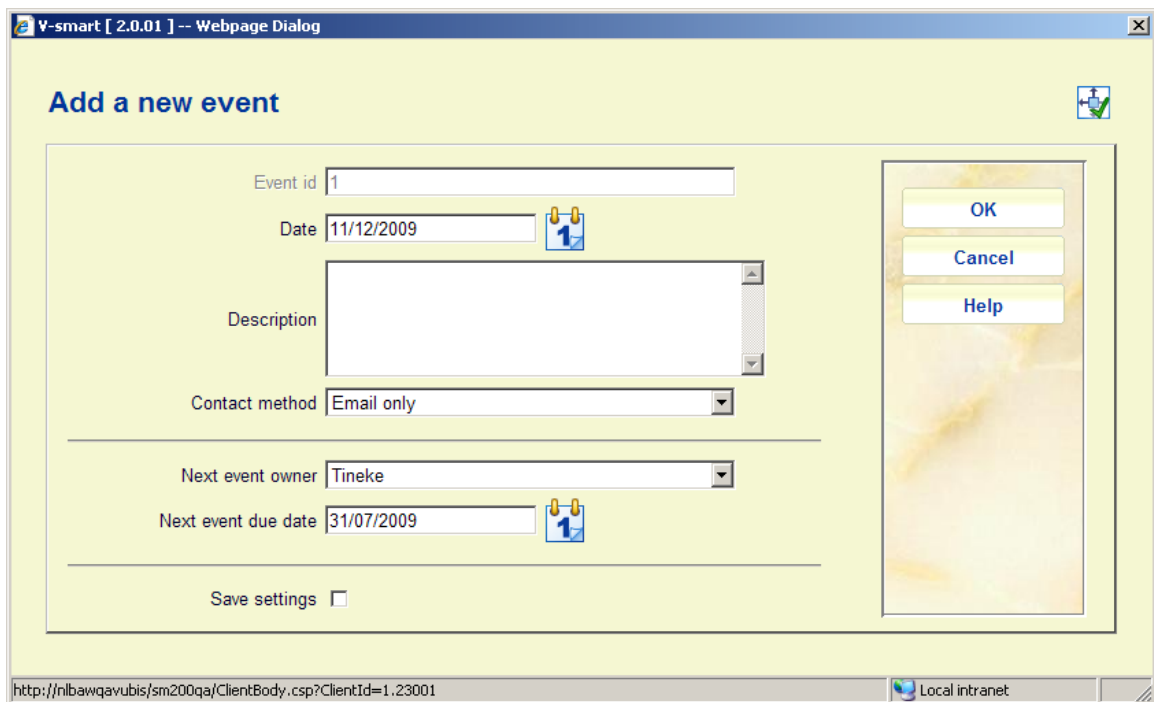
Incident related emails: Select this option to view emails related to the current incident. See section 434.4.

Borrower related emails: Select this option to view emails related to the current borrower. See section 434.4.

Non-related emails: Select this option to view general emails (i.e. emails that are not attached to a specific incident or borrowers). See section 434.4.

434.3.1 Add new event

New event: Use this option to add a new contact event for a borrower. After selecting this option an input form will be displayed:



The screenshot shows a web browser window titled "V-smart [2.0.01] -- Webpage Dialog". The main content area is titled "Add a new event" and contains a form with the following fields and controls:

- Event id:** Text input field containing the value "1".
- Date:** Date picker field showing "11/12/2009" with a calendar icon.
- Description:** Large text area for entering the event details.
- Contact method:** Dropdown menu currently set to "Email only".
- Next event owner:** Dropdown menu currently set to "Tineke".
- Next event due date:** Date picker field showing "31/07/2009" with a calendar icon.
- Save settings:** A checkbox that is currently unchecked.
- Buttons:** A vertical stack of three buttons: "OK", "Cancel", and "Help".

The browser's address bar shows the URL: <http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001>. The status bar at the bottom right indicates "Local intranet".

Fields on the form

Event id.: A protected field containing the automatically assigned sequence number of the event.

Date: Defaults to 'today' but you can select another date from the calendar. This is the date on which the event was created.

Description: A free text message related to the event.

Contact method: Select a contact method (defined in AFO 482 – Contact Management Parameters) from the dropdown list.

Next event owner: This defaults to the login ID of the person creating the incident, but another ID can be selected from the dropdown list.

Next event due date: Date and time when a reaction is requested from the Event owner.

434.3.2 View event

Select event: Select a line and then this option to view information for the selected event. After selecting this option an input form will be displayed:

The screenshot shows a web browser window titled "V-smart [2.0.01] -- Webpage Dialog". The main content area is titled "Modify event 1". The form contains the following fields and controls:

- Event id: 1
- Date: 22/09/2009 (with a calendar icon)
- Description: Call back
- Contact method: Phonecall (dropdown menu)
- Next event owner: Super User (vgg) (dropdown menu)
- Next event due date: 31/07/2009 (with a calendar icon)
- Save settings:
- Buttons: OK, Cancel, Help

The browser's address bar shows the URL: <http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001>. The status bar indicates "Local intranet".

Fields on the form

Event id.: A protected field containing the automatically assigned sequence number of the event.

Date: The date the incident was created.

Description: A free text message related to the event.

Contact method: You can select a different contact method (defined in AFO 482 – Contact Management Parameters) from the dropdown list.

Next event owner: This shows the next event owner, but another ID can be selected from the dropdown list. The next event owner is the person who “owns” the next event, i.e. he or she has to act upon this.

Next event due date: Date and time when a reaction is requested from the Event owner.

434.4 Viewing related documents and emails

There are various ways to view the documents and emails related to incidents. For each incident, the contact registration module gives you access to the feature “Related documents”. This option allows you to upload and view (download) documents. It allows the upload of documents that were sent by the customer to the library, or vice versa.

Examples of such related documents are e.g. letters of complaints or emails with questions that are sent from the borrower to the library or from the library to the borrower.

Note

The option is not meant to be a full document sharing platform and is not suited for thousands of documents.

The email component of the CRM module allows the library to link (incoming and outgoing) emails to events. This allows the library to link contact events to emails that were sent to and from a customer.

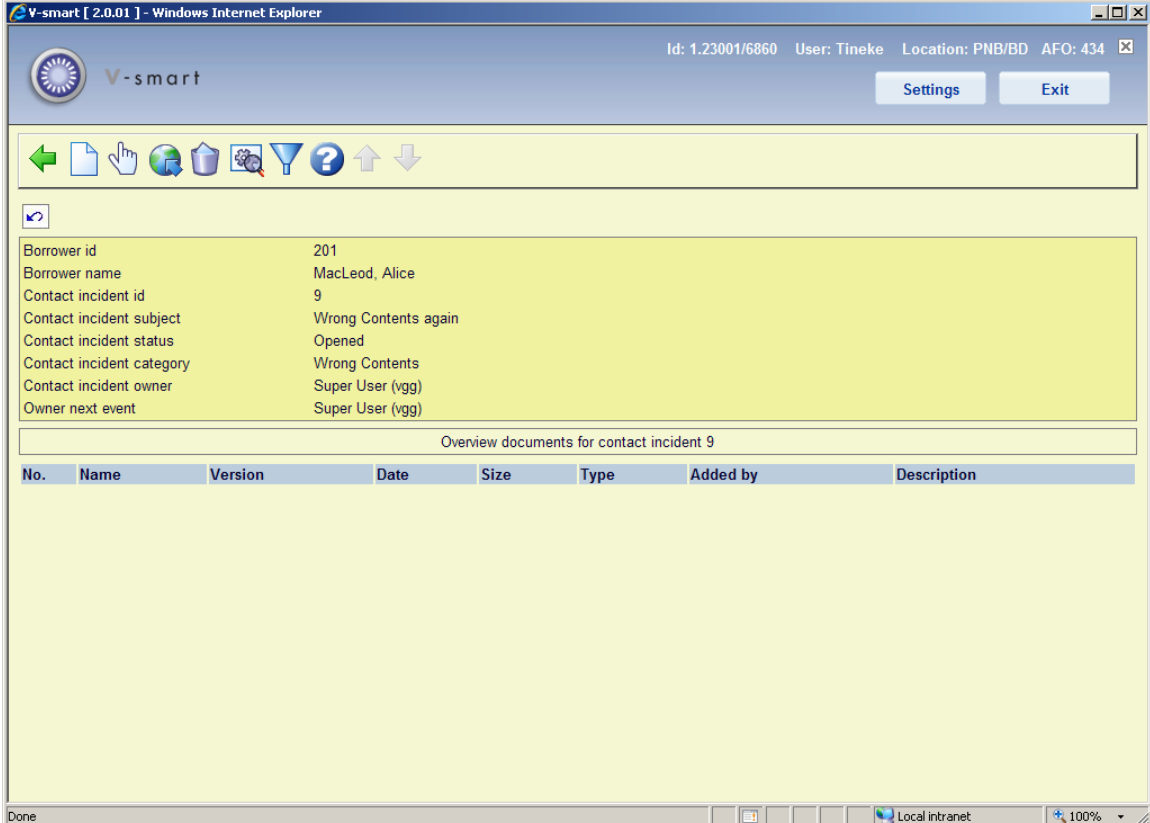
Logically, each event has its own mailbox for storage of emails. These emails can be read, sent and archived from within the email component of the CRM module. The system also allows the storage of email attachments.

The system interfaces through a regular email system. The technical requirement is that the email system should be POP3 compatible.

434.4.1 Viewing incident related documents

Incident related documents: From the overview screen of incidents select a line and then this option to view documents related to the selected incident. Or select the option **Related documents** from the details screen with events for an incident. An overview screen will be displayed:

Documents are stored inside the Vubis Smart database (and not on an external file server).



The screenshot shows the V-smart application interface in a Windows Internet Explorer browser window. The title bar reads "V-smart [2.0.01] - Windows Internet Explorer". The interface includes a navigation bar with icons for back, forward, home, search, and other functions. Below the navigation bar, there is a section for incident details:

Borrower id	201
Borrower name	MacLeod, Alice
Contact incident id	9
Contact incident subject	Wrong Contents again
Contact incident status	Opened
Contact incident category	Wrong Contents
Contact incident owner	Super User (vgg)
Owner next event	Super User (vgg)

Below the details section, there is a heading "Overview documents for contact incident 9" and a table with the following columns: No., Name, Version, Date, Size, Type, Added by, and Description. The table is currently empty.

Options on the screen

New document: Use this option to add a new document. See section 434.4.1.1.

View document: Select a line and then this option to view the content of the document. The application that is associated with the document type (e.g. Word for .DOC or Acrobat Reader for .PDF) will be started.

View document in browser: Select a line and then this option to open a document in a browser window. When you select this option, the system will open a browser window and display the document. If the browser cannot display documents of certain file types (e.g. ZIP documents), it may revert to its Open / Save As common dialogue. Please note that the exact behaviour may differ between browsers.

Delete document: Select a line and then this option to remove the document from the list. The system prompts for confirmation.

Document properties: Select a line and then this option to view its properties, the system will open a popup window that will allow you to view the document properties and modify the **Description**.

Filter: Use this option to limit the display by certain criteria. See section 434.4.1.2.

434.4.1.1 Add new incident related document

New document: Use this option to add a new document. After selecting this option an input form will be displayed:

The screenshot shows a web browser window titled "V-smart [2.0.01] -- Webpage Dialog". The main content area is a light yellow dialog box titled "New document". Inside the dialog, there are four input fields: "Document" (with a browse button), "Description" (a large text area), "Date received" (with a calendar icon and the value "11/12/2009"), and "Save settings" (with an unchecked checkbox). On the right side of the dialog, there are three buttons: "OK", "Cancel", and "Help". The status bar at the bottom of the browser window shows the URL "http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001" and "Local intranet".

Fields on the form

Document: Use the Browse button to select the required file. This will open the standard Windows dialog box for searching files.

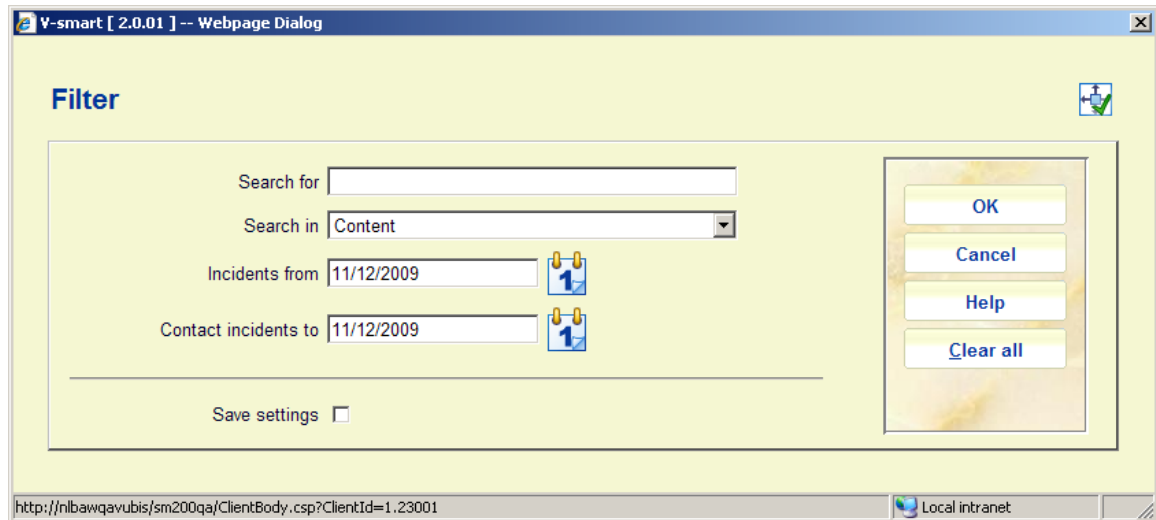
Description: Enter a brief description of the document.

Date received: This defaults to 'today'. You can select another date from the dropdown calendar.

After you have filled in the necessary fields (only the document name is mandatory), click on the **OK** button. The system will start the upload of the document; depending on the file size and the network connection speed, this may take some time. After the file is uploaded and stored in the database, the system will show a confirmation message.

434.4.1.2 Filter

Filter: Use this option to limit the display by certain criteria. A selection form will be displayed:



The screenshot shows a web browser window titled "V-smart [2.0.01] -- Webpage Dialog". The main content area is titled "Filter" and contains a form with the following fields and controls:

- Search for:** A text input field.
- Search in:** A dropdown menu currently set to "Content".
- Incidents from:** A date input field with "11/12/2009" and a calendar icon.
- Contact incidents to:** A date input field with "11/12/2009" and a calendar icon.
- Save settings:** A checkbox that is currently unchecked.
- Buttons:** A vertical stack of buttons on the right side: "OK", "Cancel", "Help", and "Clear all".

The browser's address bar shows the URL: `http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001`. The status bar indicates "Local intranet".

Fields on the form

Search for: enter the search term; if you leave the search term box entry, all documents (that fall within the defined date range) will be displayed

Search in: indicate in which data element you want to search; the system supports the following options:

- Name: the name of the document
- File contents: the full content of the document; this is only suitable for documents that contain text (e.g. DOC, XLS, PPT, [most] PDF, and others, but not JPG, MPG and other image, audio or video files)
- File description: the description that is attached to the document

Contact incidents from: the start date of a date range; by default this will be the current date.

Contact incidents to: the end date of a date range; by default this will be the current date.

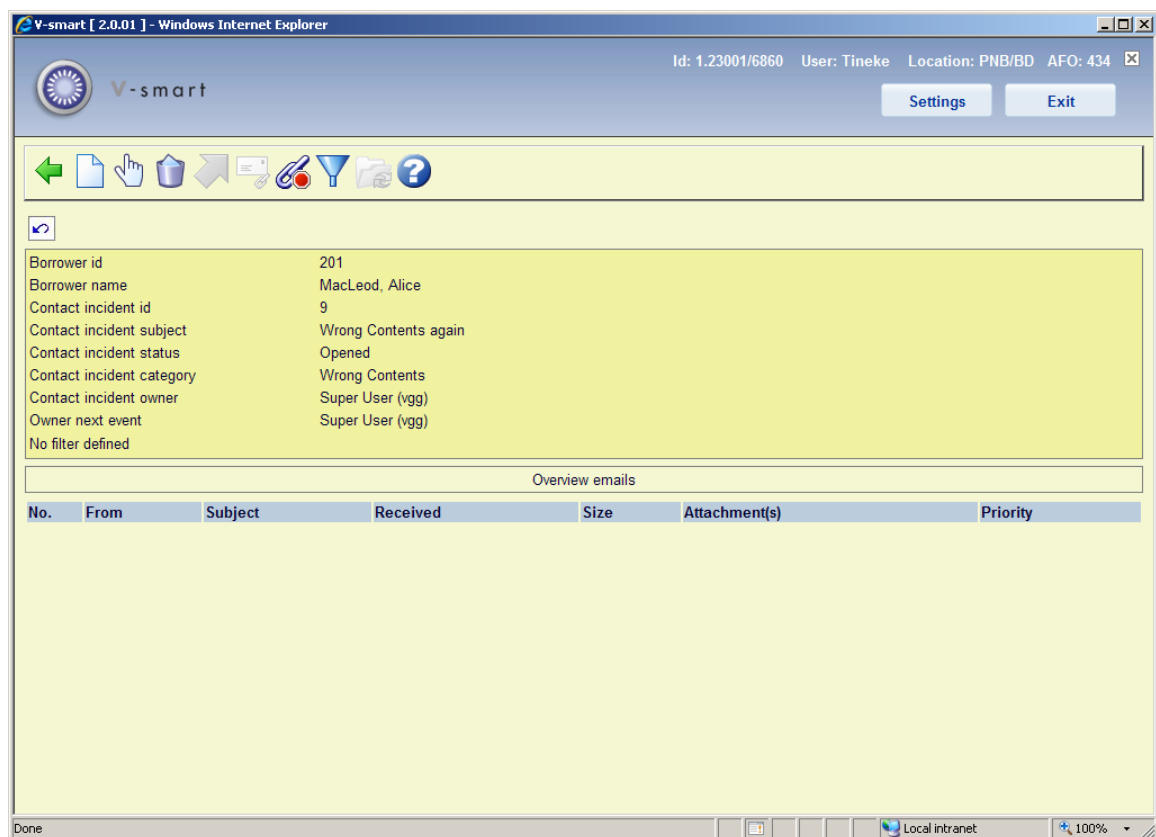
434.4.2 Viewing emails The three options for viewing emails are very similar. They are described in general below.

Incident related emails: Select an incident from the overview screen of incidents and then this option to view emails related to the selected incident. Or select this option from the details screen with events for an incident.

Borrower related emails: Select a line and then this option to view emails related to the selected borrower. Or select this option from the details screen with events for an incident.

Non-related emails: Select this option to view general emails.

In all three cases, an overview screen will be displayed. They look similar.



Options on the screen

New email: Use this option to add a new email message. See section 434.4.2.1.

Open email: Select a line and then this option to view the email properties such as subject, sender, recipient(s) and body.

Delete email(s): Select a line and then this option to remove the email(s) from the list. The system prompts for confirmation.

Move email: Select a line and then this option to move the email to another folder (e.g. from “Inbox” to “Archive in”).

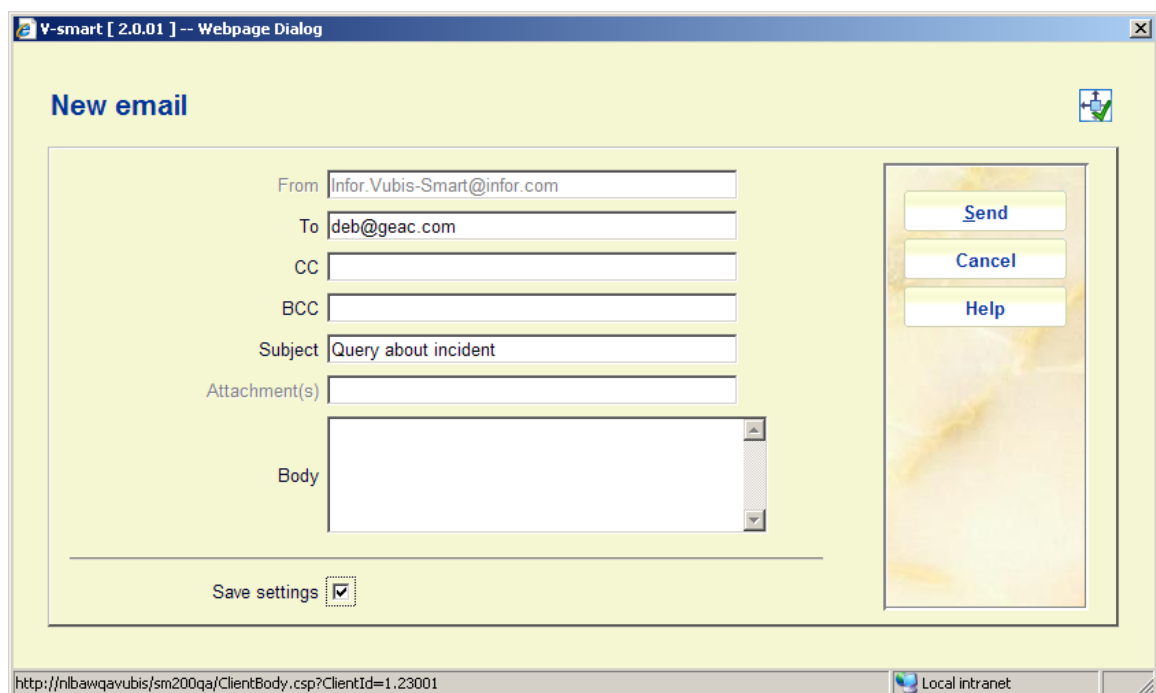
Link email: Select a line and then this option to link an email to a specific incident. (This option is only relevant for emails that are not yet linked to a specific incident.)

Filter: Use this option to limit the display by certain criteria. See section 434.4.2.2.

Switch folder: Use this option to switch to a different folder (e.g. from “Inbox” to “Archive in”). See section 434.4.2.3.

434.4.2.1 Add new incident related email

New email: Use this option to add a new email message. After selecting this option an input form will be displayed:



The screenshot shows a web browser window titled "V-smart [2.0.01] -- Webpage Dialog". The main content area is titled "New email" and contains a form with the following fields:

- From:** Infor.Vubis-Smart@infor.com
- To:** deb@geac.com
- CC:** (empty)
- BCC:** (empty)
- Subject:** Query about incident
- Attachment(s):** (empty)
- Body:** (empty text area)

At the bottom left of the form, there is a "Save settings" checkbox which is checked. On the right side of the form, there are three buttons: "Send", "Cancel", and "Help". The browser's address bar shows the URL: <http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001> and the status bar shows "Local intranet".

Fields on the form

From: Protected field containing the email address of the sender. (This email address is a system parameter and is not related to individual emails.)

To: Enter the email address of the recipient.

CC: and **BCC:** Optionally enter email addresses for carbon copy and or blind copy recipients.

Subject: Enter the subject of the email message.

Attachment(s): Documents that are linked to the email as an attachment.

Body: Enter the actual text of the email message.

434.4.2.2 Filter

Filter: Use this option to limit the display by certain criteria. A selection form will be displayed:

The screenshot shows a web-based dialog box titled "Filter" within a window labeled "V-smart [2.0.01] -- Webpage Dialog". The dialog contains a search form with the following fields: "Search for" (text input), "Search in" (dropdown menu currently showing "Address from"), "From date" (text input with "11-12-1989" and a calendar icon), and "To date" (text input with "11/12/2009" and a calendar icon). Below the form is a "Save settings" checkbox. On the right side of the dialog, there is a vertical stack of buttons: "OK", "Cancel", "Help", and "Clear all". The status bar at the bottom of the window displays the URL "http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001" and "Local intranet".

Fields on the form

Search for: enter the search term; if you leave the search term box entry, all documents (that fall within the defined date range) will be displayed

Search in: indicate in which data element you want to search; the system support the following options:

- Subject and content of the email
- Subject
- Content
- Address to (the recipient address)

- Address from (the sender address)

From date: the start date of a date range; by default this will be 20 years prior to the current date.

To date: the end date of a date range; by default this will be the current date.

434.4.2.3 Switch folder

Switch folder: Use this option to switch to another folder. A selection form will be displayed.

After switching to another folder, the new current folder will be displayed in the header pane.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	November 2009	creation new AFO in 3.0	