

Policy Status: Approved

Document Type: Policy
Primary Keyword: Information Management
Secondary Keyword: Council Policies
Tertiary Keyword: Policy -New

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Last Updated 06/10/2005

Precis: Council-Customer Request Response System

Responsible Officer: Policy Coordinator

Document:

TITLE: Customer Request Response System
AUTHORITY: Council
DATE OF ADOPTION/AMENDMENT: 2 March 2005
REPORT NO: GM 8/2005
MINUTE NO: 203
POLICY NO: C20.1
POSITION RESPONSIBLE: General Manager
RELEVANT LEGISLATION:
PREVIOUS POLICY NO:
DATE LAST REVIEWED:

OBJECTIVE

To provide guidance for the Community, Council and Staff in regards to Customer requests.

POLICY

TABLE OF CONTENT

- 1 AIMS AND OBJECTIVES
- 2 OUR SERVICE COMMITMENT
- 3 WHAT IS A COMPLAINT
- 4 WHAT IS A REQUEST
- 5 HISTORY
- 6 WHAT HAPPENS WHEN A COMPLAINT/REQUEST IS RECEIVED BY COUNCIL
- 7 COMPLAINTS AGAINST STAFF OR AGENTS

- 8 CUSTOMERS WHO CANNOT BE SATISFIED
- 9 CUSTOMERS WHO MAKE UNREASONABLE DEMANDS
- 10 CUSTOMERS WHO CONSTANTLY RAISE THE SAME ISSUE WITH DIFFERENT OFFICERS
- 11 CUSTOMERS WHO ARE RUDE, ABUSIVE OR AGGRESSIVE
- 12 HELP AND SUPPORT FOR CUSTOMERS
- 13 CONFIDENTIALITY
- 14 CUSTOMER PROTECTION
- 15 COMMUNICATION
- 16 GENERAL

1 AIMS AND OBJECTIVES

This system has been developed to assist our Customers and Council in the following ways:

- assist in improving services
- assist in resolving customer dissatisfaction in relation to services.
- reduce workload by reducing complaints/requests
- assist customers to express their views both favourable and unfavourable
- assist Council to monitor complaints/requests and respond in a timely manner
- enable customers to be kept informed of the progress of complaints/requests.

2 OUR SERVICE COMMITMENT

- Persons making complaints/requests will be treated with courtesy and respect
- The staff will actively support Council's Plans, Policies, Codes, Practices etc notwithstanding any personal views they may hold.
- Staff receiving complaints/requests will allow the complaint to be made without interjection or correction notwithstanding that the information provided may obviously be incorrect.
- Staff will honour commitments given where possible and should the commitment not be able to be met the customer is to be advised as soon as possible.

3 WHAT IS A COMPLAINT

Council has defined a complaint as "An expression of dissatisfaction with the Council's policies, procedures, charges, staff, agents or quality of service".

4 WHAT IS A REQUEST

A "request" rather than a "complaint" occurs when there is communication from a customer asking for a service or assistance that does not involve any expression of dissatisfaction with Council's, procedures, charges, staff, agents or quality of service.

(Customers regularly ask for services or report incidents, which are not complaints or an expression of dissatisfaction with Council's policies, procedures, charges, staff, agents or quality of service.)

5 HISTORY

Council previously handled complaints/requests via a "paper system" which in some instances proved less than effective as it relied on the appropriate notification reaching the appropriate person in a timely manner. Follow up using this approach was also difficult.

In June 2003 Council introduced the "Civica "Customer Request Management System.

This is a comprehensive computer based system using Lotus Domino/Notes.

The system allows for integration with Council's main computer system. A detailed description of the

Customer Request Management System is attached.

6 WHAT HAPPENS WHEN A COMPLAINT/REQUEST IS RECEIVED BY COUNCIL

A complaint/request may be made in writing, e-mail, telephone, fax or verbally.

Telephone or verbal requests are entered into the Customer Request Management System and a unique identification number is allocated which is given to the requestor/complainant for future reference.

Written, E-mail & Fax request are entered into Council's Electronic Document Management system, which generates the CRMS. The unique identification number of the CRMS is forwarded with the acknowledgment letter if the service standard for the requests is greater than 10 days. If service standard is less than 10 days, it is conveyed within the response for future reference by the customer. The complaint/request is automatically referred to the designated action officer who is required to respond in accordance with the agreed service standards.

Should the designated action officer fail to meet the service standard, the request escalates to the responsible officer for the particular activity (usually the Supervisor) for follow up.

If no action initiated the outstanding complaint/request escalates to the appropriate Director and General Manager as part of the internal monthly report process.

Complaints/requests that cannot be addressed within the service standard are to be notified by the designated action officer to the complainant i.e. by phone, e-mail, fax or letter and actions are documented through the "Comments Facility" in the Customer Request Management System. Should a customer be dissatisfied with the action/response, the matter will be reviewed by the responsible officer who will have the responsibility of advising the customer of the outcome of the review. These actions are documented through the "Comments Facility" in the Customer Request Management System

The relevant Director is to be informed of the review and outcome.

Should the customer be dissatisfied with the review they are to be advised of any right of appeal e.g. Ombudsman, Court or other authority. All advice is to be in writing. These actions are documented through the "Comments Facility" in the Customer Request Management System or link the document to the CRMS.

Anonymous complaints will only receive a response where public safety appears to be an issue or the matter is considered to be serious or urgent. All actions in relation to complaints/requests must be documented in the CRMS system in either the Comments Facility or 'Action Finalised'.

7 COMPLAINTS AGAINST STAFF OR AGENTS

All such complaints are to be treated as confidential. They are to be recorded and passed to the records section for recording in EDMS and placing in the designated confidential binders.

They are to be referred to the relevant Director as soon as possible.

Should the Director be unable to resolve the matter it is to be referred to the General Manager.

NB - Should any referral involve the possibility of corrupt conduct, it is to be referred directly to the General Manager.

8 CUSTOMERS WHO CANNOT BE SATISFIED

8.1 Customers who cannot be satisfied include members of the public or groups who do not accept that Council is unable to assist them, provide any further assistance or level of service than has been provided already and/or disagree with the action Council has taken in relation to their complaint or concern.

8.2 If in the opinion of the General Manager a customer cannot be satisfied and all appropriate avenues of internal review or appeal have been exhausted and the customer continues to write, telephone and/or visit Council the following actions may be taken:

8.2.1 The General Manager may write to the customer restating Council's position on the matter if necessary and advising that if the customer continues to contact Council regarding the matter Council may:

- i) not accept any further phone calls from the customer
- ii) not grant any further interviews
- iii) require all further communication to be put in writing
- iv) continue to receive, read and file correspondence but only acknowledge or otherwise respond to it if:
 - the customer provides significant new information relating to their complaint or concern; or
 - the customer raises new issues which in the General Manager's opinion, warrant fresh action

8.3 The General Manager shall advise Councillors of any correspondence issued in accordance with clause 8.2.1

8.4 The customer shall be given an opportunity to make representations to the General Manager about Council's proposed course of action.

8.5 If the customer continues to contact Council after being advised of Council's proposed course of action, the General Manager may, after considering any representations from the customer, advise the customer that any or all of points i) – iv) above will now apply

9 CUSTOMERS WHO MAKE UNREASONABLE DEMANDS

9.1 Customers who make unreasonable demands include members of the public whose demands on Council start to significantly and unreasonably divert Council's resources away from other functions or create an inequitable allocation of resources to other customers. Such demands may result from the amount of information requested, the nature or scale of services sought or the number of approaches seeking information, assistance or service.

9.2 If in the opinion of the General Manager a customer is making unreasonable demands on Council and the customer continues to write, telephone and/or visit the Council, the following actions may be taken:

9.2.1 The General Manager may write to the customer advising them of Council's concern and requesting that they limit and focus their requests and that if the customer continues to place unreasonable demands on the organisation Council may:

- i) not respond to any future correspondence and only take action where, in the opinion of the General Manager the correspondence raises specific, substantial and serious issues; or
- ii) only respond to a certain number of requests in a given period.

9.2.2 The General Manager shall advise Councillors of any correspondence issued in accordance with clause 9.2.1

9.2.3 The customer shall be given an opportunity to make representations to the General Manager about Council's proposed course of action

9.2.4 If the customer continues to contact Council after being advised of Council's proposed course of action, the General Manager may, after considering any representations from the customer, advise the customer that either or both of points i) – ii) above will now apply

10 CUSTOMERS WHO CONSTANTLY RAISE THE SAME ISSUE WITH DIFFERENT OFFICERS

10.1 If in the opinion of the General Manager a customer is constantly raising the same issues with different officers the following actions may be taken:

10.1.1 the General Manager may notify the customer that:

- i) only a nominated officer will deal with them in future
- ii) they must make an appointment with that person if they wish to discuss their matter; or
- iii) all future contact with Council must be in writing.

10.1.2 the General Manager shall advise Councillors of any notification issued in accordance with clause 10.1.1.

10.1.3 the customer shall be given an opportunity to make representations to the General Manager about Council's proposed course of action

10.1.4 if the customer continues to raise the same issue with different officers after being advised of Council's proposed course of action, the General Manager may, after considering any representations from the customer, advise the customer that any or all of points i) – iii) above will now apply.

11 CUSTOMERS WHO ARE RUDE, ABUSIVE OR AGGRESSIVE

11.1 Rude, abusive or aggressive behaviour may include rude or otherwise vulgar noises, expressions or gestures, verbal abuse of either a personal or general nature, threatening or offensive behaviour, physical violence against property or physical violence against a person.

11.2 If in the opinion of any officer a customer is rude, abusive or makes aggressive comments or statements in telephone conversations or interviews, the officer may:

11.2.1 Warn the caller that if the behaviour continues the conversation or interview will be terminated

11.2.2 Terminate the conversation or interview if the rude, abusive or aggressive behaviour continues after a warning has been given.

11.3 Where a conversation or interview is terminated in accordance with clause 11.2.2, the officer must notify the General Manager and/or the relevant Divisional Director of the details as soon as possible.

11.4 If in the opinion of the General Manager any correspondence to Council contains personal abuse, inflammatory statements or material clearly intended to intimidate, it will be acted upon as appropriate under the circumstances.

12 HELP AND SUPPORT FOR CUSTOMERS

Customers who have difficulty in lodging a complaint should contact Council's Customer Services Staff and confidential assistance will be provided.

13 CONFIDENTIALITY

Council will comply with the requirements of the Privacy and Personal Information Act 1998 in its dealings with complaints/requests and the identity of the customer will not be disclosed unless required by law.'

The subject and substance of the complaint/request may be required to be disclosed to properly investigate the complaint/request.

14 CUSTOMER PROTECTION

All customers have the right to make a complaint or request without fear of victimisation/reprisal and staff/agents are aware of their responsibilities in this regard.

Any allegations regarding victimisation/reprisal are to be immediately referred to the General Manager

15 COMMUNICATION

Complaints/Requests will be monitored on a monthly basis and where reporting indicates a systematic issue, investigations will be undertaken and where appropriate remedial action taken.

Each four (4) years a comprehensive community survey will be undertaken which assists Council to measure progress over time in relation to service delivery.

The annual report will provide details of actions initiated as a result of customer feedback via complaints/requests.

16 GENERAL

Council welcomes your feedback on this system and you are invited to contact the General Manager directly on (02) 4993 4208 or by e-mail at bernie.mortomore@cessnock.nsw.gov.au

Or

You can lodge your complaint/request :

In writing:

- Council's Postal Address is: PO Box 152, Cessnock. 2325
- Council's email address is: council@cessnock.nsw.gov.au
- Council's fax number is: 4993 2500

By telephone: - Contact Council's Customer Service Centre on 4993 4100

Personally: - Visit Council's Customer Service Centre located at:
62-78 Vincent Street,
CESSNOCK.

Business hours are 8.30 am to 5.00 pm – Monday to Friday

Council's After Hours Emergency Number: 4940 7816

ATTACHMENT TO POLICY C20.1

CUSTOMER REQUEST MANAGEMENT SYSTEM

The Civica Customer Request Management System is a comprehensive customer service tool which handles all calls which are received by Council and provides statistical data on the rate of incoming calls, inquires and requests and their relevant department. Written in Lotus Domino/Notes, the system offers all the security, workflow and replication benefits of its core infrastructure while extending this to provide Council with a system which operates to its unique workflow and process requirements.

Remote Access

Requests are entered into a central database located on a Lotus Domino/Notes fileserver in Council's Administration Building. This is accessed by users throughout Council across the local area network. Remote users at depots, libraries and contractors can either access this database across a wide area network connection such as Citrix, dial up to the Administration Centre fileserver or via a replica held on a Lotus Domino/Notes fileserver at the remote site which is then replicated on a regular schedule. The first two options provide true on-line access but are restricted by the speed of the connection. Users at the remote sites can both create and review requests.

When a Customer Service Officer creates a request it is date and time stamped and the user's name is saved in the request. When entry of the request is completed, a prompt appears on screen with all the important details of the request for confirmation and a unique request number to pass on to the caller.

Disabled users such as the sight impaired can operate almost all functions of the system via access to pull-down menus using voice recognition software. This includes all steps in the creation of a request, but is restricted in some of the more complicated actioning functions.

The security offered by the core database infrastructure, Lotus Domino, is among the most robust available. Access to reading, creating, editing and archiving requests can be set on an Access Control List level. Access to reports in the system is provided through Lotus Domino/Notes view security based on a user's rights in the Access Control List and groups in the Lotus Domino Name and Address Book. Security can be extended to actions for requests including finalisation. This can be set so that only the person currently allocated the request can finalise it or so that only users defined in the request type entry in the administration database can finalise requests of that type.

Other Systems Connectivity

Standard letters can be generated within the system to ensure a uniform response to requests. These can be generated using Lotus Notes as the text editor or with embedded objects in the form. Documents created in any OLE compliant application can be embedded in a Notes form allowing users to operate with a familiar applications interface when creating responses in the CRMS. Both WordPerfect 8 and Lotus 123 comply to this standard. Information from the request can be automatically transferred into these forms. Standard acknowledgment letters, letters with standard and non-standard text, faxes, internet mail can all be catered for by the system.

Messaging

The Customer Request Management System operates with a wide range of messaging systems. EMail allows for document links to be embedded in the mail message so that users simply click on the icon in their mail message to launch the request to be actioned.

Property Information Integration

Information from core Council applications such as **AUTHORITY** Local Government System can be imported into Lotus Domino/Notes databases by creating import views which define the information to be imported into the Domino/Notes database form. Provided this data can be extracted to either a comma-delimited text file or spreadsheet this information is easily converted.

An operational example of this information extract is the automatic generation of the location property owners' names when creating a request. This information is accessed using the location details and property identifier from a property extract and saved with the location in the request.

Lotus Domino/Notes offers real-time and batch-level bi-directional integration with relational, mainframe and transactional systems through ODBC and Lotus Enterprise Integrator. This allows you to use Domino/Notes as your central access point to any database or transaction system via ODBC messaging or high-volume data interchange Option.

Lotus Domino/Notes offers extensive connectivity options for fast seamless integration with RDBMSs and transaction systems. Programmable real-time and batch-level bi-directional integration with relational, mainframe and transactional systems through ODBC, LotusScript:Data Object (LD:SO) and Domino.Connect. Domino seamlessly connects to your relational databases and transaction systems so that your Internet and intranet applications can leverage and even extend your back office applications.

Integration with Geographic Information Systems can be achieved. This allows for a map of the location to be displayed on clicking a button in the request form.

This will provide a GIS session within the Customer Request Management System so that users can interact with the application, zooming in and out on locations, moving to the next map in the sequence and adding information to the map.

Integration with other Council processes such as assets register, facilities management, inspections, parking infringements, maintenance management, local traffic management and insurance and claims management, can be generated through development of standard forms within the system to mirror existing documents where current procedures are in hard copy and through data extraction and transfer where other software is used. Many of these processes could also be developed into Lotus Domino/Notes applications as the need arises providing for true bi-directional exchange of information.

Existing Customer Service information can be made available to users for historical purposes by extracting this information as comma-delimited text and importing it to a Lotus Domino/Notes database. All information held in requests would be available in the Notes form and views can be developed to provide the statistical information required.

The Customer Request Management System has been designed to take advantage of the web hosting features of Lotus Domino 5.x. This allows you to create, escalate and report using a Web browser, on either an Intranet or Internet facility using Microsoft Internet Explorer or Netscape Navigator. Full functionality for browser clients is available in Lotus Domino 5.0.

Electronic faxing of information to customers is available through a network based fax application. This allows users to fax information regarding their request to customer through a simple action in the Action List button. This can also be achieved by using the normal print function within Lotus Notes in conjunction with a network based fax facility. This information includes details in the information and schedules sections of the request type.

Remote and mobile users can take advantage of the advanced replication features of Lotus Domino/Notes. Using a 3Com Palm Pilot, users can download a subset of a Lotus Domino/Notes database. This means that users can download only the requests allocated to them, enter comments or instigate any of the actions available to that request type including finalisation on these requests while in the field, then "hot-synch" this subset with the Customer Request Management System when they return to their workstation.

Customer Request Types

The administration database is the core of the CRMS process. Information in the database defines the type of requests handled by Council, the responsible officers for those requests, Council facilities, streets and suburbs, associated correspondence and service standards.

The request structure can be split into three types: Council information, outside information and requests for action. This information is drawn upon when customer service operators take an incoming call. The number of request types entered into the administration database is unlimited but operationally a maximum of 500 request types is optimal. This means that Customer Service Officers are able to select request

types which closely relate to the request being logged without having to search through several hundred request types reducing their response time during the call.

Service standards are allocated to each request type. The service standard applies to the entire action group for the request type. Sequentially routed requests are timed from creation to finalisation, rather than in individual steps to finalisation. Single allocation request type are allocated a service standard that measures creation time to finalisation time.

Requests can be flagged by the system for a variety of reasons. If a request has been made by a Councillor, MP or senior management, this is marked on the request by simply clicking on the VIP button in the form. The use of the VIP button is passworded and these requests then attract a higher service standard. Safety and risk management requests are flagged in the same way so that these issues can be dealt with quickly and efficiently. These are also sent to Council's Risk Management Officer so that they are aware of any potential issues at the earliest possible opportunity.

Several requests are often brought to the attention of Council during a single telephone call. These are handled by the system to allow for minimum rekeying and an integrated response. When the first request is completed, the Customer Service Officer clicks on the Multiple button instead of the Save button. The usual prompt boxes appear giving request type and receipt number information, then a new request form is displayed on screen with the customer's details already included; the operator simply has to enter the request type and location to complete the request. Requests created in this way are flagged as multiples so that all actioning officers are alerted to them.

The system also alerts operators to duplicate requests. This appears after the request has been entered and gives full details for duplicates (name of customer, address, date and time request was logged as well as the request number). The user can then select the duplicate, which will be opened and the caller's information added to the repeat history, eliminating additional requests for action from the responsible officer while adding the caller's details to the request.

When a Customer Service Officer answers a call, they enter the request type within the three-tiered structure. If the request is flagged as Council information or outside information (i.e. it does not require further action by Council) all relevant information will be shown on screen. The request is then completed and an information call logged for that operator without the need to enter location or customer information.

Requests that require action by Council staff are handled in the same way as information requests initially. The request type is entered within the three-tiered structure, and a prompt box appears with information concerning the operation and procedural handling of a request.

The information prompt box lets the operator know all the information required from the caller. When clicked, the Instructions and Procedures buttons which appear in this prompt box, displays special instructions and procedural information for the request type.

Location and customer details are entered from pick lists, which display all streets, suburbs and Council-owned facilities. When the location is entered, a prompt asks if it is the same as the customer's address. If so, this information is automatically entered without the need to rekey.

The information statistics database contains data on all requests entered into the system. Using this database you can create graphic and tabled information on Council's customer service levels and needs. It provides an invaluable human resources tool as it shows how many enquiries and requests are handled and how efficiently they are dealt with. It also gives an insight into the needs of ratepayers, showing what their concerns are and allowing Council to service them properly.

Calls logged in the statistics database are categorised as Council information, outside information, action requests and transferred calls so that a complete picture of the type of calls handled at the Call Centre can be developed.

Anonymous callers are provided for by the system as are confidential requests, which can be accessed only by those assigned security rights in the Access Control List. When a Freedom of Information request is entered into the system, rules established in the request type in the administration database ensure that it is forwarded to all those who need to action it.

The CRMS includes a materials component, which allows users to generate and record multiple transactions/components within one request. Rate/unit tables containing component information such as units of labour, plant, materials etc will be stored in the administration database with the request type. When the request type is selected during the creation process, the relevant components will be displayed in the job itself. The responsible officer, when actioning the request, can then complete the number of units for each component which will be used for the job so that an order/requisition to a "provider" can be generated as part of the process of resolving the request. Cost code, account, provider and description details are also included in this materials component.

Attachments can be made to requests so that all information required is stored in the request. These attachments can include sound, full-motion video, electronic photographs, images, word processing files and spreadsheets.

Knowledge Base

The administration database is the core of the CRMS process. The request type form in this database includes sections for all of the information required by Customer Service Officers to enter a call.

Security can be assigned to the administration database through the Access Control List in the same way as the main Customer Request Management System database. Those officers assigned editing rights by the Lotus Notes administrator will be able to update and add request types and other details in this database ensuring that it is a dynamic representation of the call types received by Council.

Requests are assigned a form type in the administration database. Form types include Council information, outside information, request (for action), complaint, Tree Preservation Order and Building Inspection. This ensures details peculiar to particular types are prompted and allowed for in the action notification form.

When a request type is selected, there are three sources of data, which can be displayed in the Information prompt box, which appears. The first to appear is Information for the request including details to pass on to the customer (e.g. fees, formulae used to calculate rates, how and who will handle the request). There are three buttons across the top of this prompt box - Information, Special Instructions and Procedure for the request type appears in this prompt box as well to any questions asked of the customer.

When a customer service operator creates a request a set of special instructions appears. These special instructions are related to the request type created. There are two types of special instructions that can be retrieved. These are action type requests and information only. The action based special instructions includes information to give or ask the customer, while the information only provides information to the customer eg. Library opening hours.

In the case of actioned requests, the service standard has a space to type in the answers

Responsible officers for particular request types are stipulated in the request type form in the administration database. These are then automatically e-mailed when a request of that type is entered into the system. When the Customer Service Officer completes the request a confirmation that an e-mail message has been sent with the name of the responsible officer appears on screen. This information can be passed on to the customer if required.

Requests can be allocated in three different ways. A single allocation request is sent to only one responsible officer. Dual allocation requests are automatically e-mailed to two or more officers simultaneously. This is the case when a request is flagged safety or risk management by the Customer Service Officer and the request is sent to Council's Risk Management Officer as well as the responsible officer in the administration database but can also be assigned to request type in the administration database. Route allocations are sent to one or more officers in sequence, i.e. only when the first officer has completed their part of the action is it e-mailed to the next responsible officer.

Service standards are allocated to each request type. The service standard applies to the entire action group for the request type. Sequentially routed requests are timed from creation to finalisation, rather than in individual steps to finalisation. Single allocation request type are allocated a service standard that measures creation time to finalisation time.

Escalation periods are stipulated for each request type in the CRMS administration database. These need not be the same as the service standard. If the request is not finalised before the escalation period, the officer stipulated in the administration database for that request type (usually the responsible officer's supervisor or manager) is automatically notified by e-mail.

Request types can also be assigned standard letters and forms, so that actioning officers can quickly, easily and uniformly respond to the customer's request.

Customer Complaint Register

Requests which are assigned the complaint form type in the administration database are handled in a different way to other requests in the system. On entry an additional prompt box will request information regarding the complaint as well as specifically inquiring whether it is a safety or risk management issue. Views displaying only requests created in the complaint form can display responsible officer, results of the investigation, resolution and how and when the customer was advised. These can be sorted on their status - whether they are open or finalised. The complaint action notification form will have additional fields to records these details. Complaint views can be made secure so that those assigned rights in the Access Control List are able to view them.

Priorities and Allocation

Service standards, responsible officers, escalation periods and officers are assigned to the request type in the administration database. Security in the administration database is set at Access Control List level so that only officers assigned editing rights by the Lotus Notes administrator will be able to update any of the details in this database.

Requests are automatically allocated to the responsible officer assigned in the administration database. An escalation period is assigned to the request type (this need not be the same as the service standard) and the request is escalated to the escalation officer assigned in the administration database. Any of these variables can be changed by authorised editors of the administration database.

Escalations on individual request types are most easily turned off by extending the escalation period. Escalations can be turned off system-wide by the database manager by disabling the scheduled macros which mail outstanding requests to the escalation officer.

Search facilities

Views within the 'Customer Request Management System' provide quick and easy searches for requests. These views are accessed by clicking on buttons in the navigators in the same way as requests are created. Requests are sorted according to the type of request, location, date, whether they have been duplicated, by action, area, asset, category, number, customer. Exception reports also display open requests outside their service standard.

The searches available to Notes users are among the most extensive available. You can search for a word in any of the requests or within a specific time period. The search engine will return all requests including the word, even if it is in an OLE object, and highlight them within the request. The Lotus Notes search engine allows users to search the database by one or many criteria including Boolean search facilities (and, or, not).

The Administration database is similarly full text indexed and searchable through the standard Domino/Notes search engine allowing users to search for Council procedures and processes for request types. News is covered by the Stop Press functionality described in *Broadcast Function* below.

Printing Capabilities

Requests, once saved, are viewed in the action notification form for the request type. These can be printed using the print button at the top of the form. The user's name and the fact that the document has been printed is added to the audit history. This audit history is printed with the request.

Information, special instructions, procedures can be printed using standard commands when viewed in a browser, either Notes, Internet Explorer 5.0 or Netscape. The browser is opened by selecting the Print

Information button when entering a request.

The request types in the administration database can also be printed using standard Windows commands and pull-down menus. These are accessed through specific print views in the administration database which display only the request type and information fields, making it distributable to the public.

Receipt information can be printed using the print button in the dialog box allowing Customer Service Officer to pass details of the request type and receipt number to counter customers in hard copy.

Facilities Management

Facilities management can be provided in two different ways by the system. Council facilities can be booked using the Lotus Domino/Notes resource scheduling functionality. Facilities would have to be listed in this database and some basic calendaring and scheduling training implemented for users, providing a cost-effective solution for Council.

An alternative, more comprehensive solution is an interface in the Customer Request Management System through a button link to the Civica Halls and Parks Booking System. This would provide information and address details of the facility to Customer Service Officers who could search for facilities which meet the customer's requirements. Bookings, comments and receipting are also handled by the system.

Council Calendar/Community Directory

Access to a Council events calendar would be provided by a button link to the calendar database updated by administration staff. This database is displayed in calendar format and can be scrolled by date.

Community directory information would be entered into the Administration database as outside information requests. When entering this database a field flagging them as community directory information would be selected. This information could then be accessed via a button link to the administration database, which displays a view with only these request types and would be accessible to browser clients.

Audit Trail

Not only does the 'CRMS' provide an efficient way for entering requests which are handled by council. It also allows for all information regarding requests to be stored centrally. Actions taken regarding any request are stored at the bottom of the request form in the call information section. This allows you to see what has been done regarding a customer's request and how long it took to be resolved. Comments for any action (e.g. placing a request on hold, referring it to another officer or reallocating it) are stored in the action history as well as any change in safety status and customer enquiries

Broadcast Function/Stop Press

A stop press facility allows broadcast of any issues, which may affect the actioning of requests. Stop press items automatically inform users in a group in the Name and Address Book when they are entered.

Notifications

Once a request has been entered an e-mail message is automatically generated by the system and forwarded to the responsible officer. A variety of actions are available for officers handling requests. Requests can be listed for inspection or budget consideration, set aside for litigation, associated forms such as maintenance, works orders and standard letters generated within the system, or comments placed on a request.

The system includes a resubmit button, which allows officer to specify a date on which they wish to receive an e-mail reminder regarding a request, notifying them of follow up required. The user the resubmit is assigned to, the date and reason are set by the officer sending the resubmit, it can be resubmitted to the actioning officer or any other officer listed in Council's Name and Address Book.

Escalation periods are stipulated for each request type in the CRMS administration database. These need not be the same as the service standard. If the request is not finalised before the escalation period, the officer stipulated in the administration database for that request type (usually the responsible officer's

supervisor or manager) is automatically notified by e-mail.

Escalations for requests not opened within a specified period can be set globally on the system. Different escalations on no action cannot be set for each request type. The default period for these escalations is three days.

Reporting Requirements

The Civica Customer Request Management has extensive reporting facilities. Graphic reports can also be created using Crystal Reports. Views provide quick and easy reporting. These views are accessed by clicking on buttons in the navigators in the same way as reports are created. Requests are sorted according to the type of request, the time, whether they have been duplicated, by action, area, asset, category, number, on hold and urgency. A wide range of reports are available through the viewing area. These provide strong management tools including exception reporting and departmental work in progress.

The length of time requests are kept in the production system before being moved to an archive version of the database is stipulated in the request type form. Searches within Lotus Notes can be conducted across multiple databases enabling access to all requests entered into the Customer Request Management System. Default searches are conducted only on the database, which the search is entered into.