

## Development User Group (DUG) meeting Tuesday, 13 April 2010

### Present

James Hunt (JH)	AdviceUK (AUK)
Alasdair McLaren (AM)	Resolution Case Management (Res)
Christian Bodden (CB)	Leeds University SU
Jenny Haigh (JHA)	Huddersfield SU
Mala Wainwright (MW)	Greater Manchester Immigration Aid Unit (GMIAU)
Baljit Badesha (BB)	Nucleus Legal Advice Centre
Sylvia Velasquez (SV)	Migrants Resource Centre (MRC)
Sarah Duvigneau (SD)	Law Centres Federation (LCF)

### Apologies

Ryszard Opasiak (RO) Harlow Welfare Rights

### Non-attendees

Tobias Stapf (TS)	Toynbee Hall
Michael Bates (MB)	Birmingham Law Centre

### Agenda

1. Welcome & Introduction
2. Purpose of DUG
3. Software Development
4. Re-architecture of AdvicePro
5. Development requests from observational framework & DUG

### Welcome and Introduction

Introduction and set out of agenda.

### Purpose of DUG

As this was the first DUG of the year JH & AM wanted to go over what the purpose of the DUG. JH set that the DUG was put together to enable Res & AUK to collect user feedback on:

1. Everyday use of the system
2. Current areas that need to be improved
3. Current areas that are meeting and exceeding the needs of users
4. The path that future development will take.

AUK & Res require members of the DUG to collect user feedback from their organisation and organisations in their field of advice based upon the points above. In return AUK will reimburse reasonable travel expenses and pay each participant's organisation £150 for each session attended. Also DUG members were entitled to ask to be included in on any trials for new features of AdvicePro.

### **Action: JH to make sure each organisation has invoiced AUK**

The group discussed the best ways of distributing information to users. Various methods were discussed but it was agreed the best way was either through the login page or the message board. AM said that the message board was for technical message and these would be lost if the board was overused. DUG agreed that a sensible balance should be struck, nothing as intrusive as a pop every time a user logged in but nothing too sparse.

### Software Development

Divided up into three areas:

1. Word Processor & Certificated work
2. Domestic Violence (DV) Module
3. Performance

### Word Processor & Certificated Work

Both JH & AM were sorry to say the only delay in realising the promised Word processor and, connected to that, the certificated work was due to AUK & Res not being able to agree on the cost of licensing and cost to users of each package. AM re-iterated that both had been developed and were to be tested as described in the minutes from the last meeting. MW said that the fact that the word processor is available but not in general use was 'annoying'. The DUG discussed what if any the cost of this and other modules should be, JHA said that if these modules saved a organisation money then they would be purchased. BB said that it would depend on cost for his organisation.

**Action: AUK & Res to agree on cost, if any, of Word processor & certificated work module as a priority**

### DV Module

JH said in consultation with Women Together Against Abuse (WTAA), a group based in London, a DV matter type; specific DV sub-matter types; strategies and outcomes. This is now available for **all** users of AdvicePro. JH said that this was done as a 'taster' for a full DV add-on the same as debt or LSC. JH asked if this was a good way of increasing sales and improving the system overall. Several members of the DUG said that the best way was 'tweaking the system rather than more modules. CB gave the example of a housing database (DB) for landlords (like the creditor DB) for SUs rather than a specific housing module. CB said that this is something that SUs would pay.

**Action: AM to look into the cost of producing such a DB and the implications future DBs**

**Action: AM to look into a family member search tool, as suggested by MW**

**Action: AM to look into creditor information to follow client, as suggested by BB**

**Action: AM to look into a producing a 'timeline' for strategies once they have been completed**

### Performance

AM said that towards the end of February 2010 the system had slowed down, Res had identified the cause of the problem as a marked increase in the amount and complexity of adhoc reports being run. To solve the problem Res has split the reporting function onto another server and made changes in how data is retrieved which has produced a marked increase in speed. To help the reporting further, the reporting will have two different servers. Users will be able to select between these two servers when reporting, the data on one will be up-to-the-minute but will be slower; the other will have data which will be, at most, 24 hours old but will be faster. The DUG said that 24 hours will not impact greatly in a organisations work. AM also said Res have placed triggers around the application which will let them know what areas are slowing the system down. AM said this process is ongoing and has already been started.

### Re-Architecture of Software

AM outlined the project which has been started and will run for approximately 12 months. The coding behind AdvicePro is 5 years old and needs to be re-worked to meet the demands of today. What this will mean for the user would be a true customisable system. Users will be able to hide areas they don't use and re-arrange areas of the system to fit in with the way the users work, an example given was the BBC website's homepage ([www.bbc.co.uk](http://www.bbc.co.uk)). Information can be moved from other pages giving full flexibility to the user. BB asked how this would be administrated. AM said that the agency manager login would have full control over the layout and individual users would have be able to change their screen within the framework set out by the manager.

MW asked when this would be completed AM said they were working towards an early 2011 release. AM revealed some of the ideas being discussed by the development team.

Am also said due to a recent acquisition Res now has a full time graphic designer. Res can re-design the 'front-end' to make it user friendly.

Both CB and JHA said that this would be the system which would drive forward both sales and current user satisfaction.

**Action: AM to run re-designs through DUG**

**Action: AM to continually up date DUG on progress the re-architecture**

Development Requests from Observational Framework & DUG

Please see Appendix 1 for more information.

1911 Ad hoc reports cannot do this at present as it is very technically difficult.

1912 BB agreed.

**Action: AM to look into**

1921 AM explained that there would be data storage issues. CB said that it would be useful for photos.

**Action: AM to contact user and see what they are trying to upload**

1927 JH said this was basically a reference tool. The group felt that this had moral implications as well as Resolution are not allowed to transfer personal data electronically due to the data protection act.

1944 -

**Action: AM to add onto AdvicePro**

1979 Am said this is being done.

1995 -

**Action: AM to do**

1999 BB said without this it stops it being a true case management system. In the latest version of Microsoft development tools it was more straight forward to develop plugins for Outlook which would allow easier communication between AdvicePro running in a browser and Outlook 2007 onwards.

**Action: AM to look into**

Email from RO RO wanted KPI reports to be discussed (he had been in communication with AM).

1) Flag for cost limits. MW said that something to show cost limits for each case. BB said that the input for each case should be automatic.

**Action: AM to change cost limit nationally**

2) Fixed fee margin report. BB said this was already available in standard reports - Total cost & average time report.

**Action: BB to contact RO about fixed fee margin report**

**Action: AM to talk to David Gilmore at DG law for an update for reports**

A.O.B

JHag said it would be useful for a bulk closing of inactive cases for their end of year. MW said that inactive cases are based upon work completed not when cases are modified.

BB said that being able to search for cases by sub-matters, AM said that would be available in the re-architecture. BB also said that notes cannot be deleted.

**Action: AM to look into**

MW said she couldn't edit disbursements, AM said that could be done.

Outcomes came up again, JH said outcome are generally based upon funders requirements and a definitive list which would satisfy all users would be difficult to agree. SV said separate funders would have different outcomes. To make a start it was decided for the DUG to collect outcomes they have been asked to collate and bring them to the next meeting.

**Action: DUG to collect a list of funders outcomes for next meeting**

### **Observations/Enhancements**

#### **December 2009 – April 2010**

- |      |   |
|------|---|
| 1900 | LSC Codes – DOB validation is being looked at.  |
| 1911 | General I have a query with regards to ad-hoc reports. I need to put together an ad-hoc report for all of Capitalise that tells me which cases (identified by system case ID) for which agency users in which agencies do not have Age Range specified. I've run a report on the condition "Age Range is empty" but that does not return the correct results. Please advise.  |
| 1912 | Previously we are able to transfer Financial Statement from the archived case to the new case that was opened for the same client but now we are unable to do that, we will appreciate if we are informed how to do that as this will make things easier for us   |
| 1921 | Uploading limit of 10Mb rather than 5Mb   |
| 1927 | The proposed specification for the advice services tender in Manchester places great stress on "a unique identifier for each caller" in order to track clients around different advice agencies. At present there is no facility in Advicepro to consolidate several records which relate to the same person into one record. It may become important to have such a facility in the future, and probably in other areas as well as Manchester. |
| 1944 | A closed date added to Enquiry Details  |
| 1979 | Removal of duplicate categories – this is scheduled for next year   |
| 1995 | Client Enable symbols when searching for a client, e.g O'Brien  |
| 1999 | Task list should be able to be a little like Outlook Express's task list i.e. you should be able to prioritise tasks and manoeuvre the list to reflect your priorities. I believe he has considered using the task list on Outlook Express, outside of Advicepro, to help him with this.  |