

## Development User Group (DUG)

Tuesday 22 September 2009

### Present

Alan McLaughlin (AMC)	Resolution Case Management (Res)
Alasdair McLaren (AM)	Resolution Case Management (Res)
Baljit Badesha (BB)	Nucleus Legal Advice Centre
Beverly Jones (BJ)	Brixton Advice Centre - Arrived 10:25am
Chris Lansdell (CL)	Resolution Case Management (Res)
Christian Bodden (CB)	Leeds Metropolitan SU
James Hunt (JH)	AdviceUK (AUK)
Jenny Haigh (JHA)	Huddersfield SU
Michael Bates (MB)	Birmingham Law Centre
Ryszard Opasiak (RO)	Harlow Welfare Rights
Sarah Duvigneau (SD)	Law Centres Federation (LCF)
Sylvia Velasquez (SV)	Migrants Resource Centre

Chair: James Hunt

### Apologies

N/A

### Non-Attendees

Kathy Wade (KW)	Toynbee Hall
Mark Allen (MA)	Toynbee Hall

### Agenda

1. Welcome and Introductions
2. Previous minutes and update on action points
3. Development requests from observational framework & DUG
4. Plan for next development year - 2010
5. A.O.B

### Welcome and Introductions

JH felt that since we had new members of the DUG it was prudent for everyone to re-introduce themselves.

### Previous minutes and update on action points

Using the action points from our last minutes as a check list, please see appendix 1.

JH confirmed that the he had not received the minutes from BJ for the meeting 17 April 2009. AM confirmed he had received notes.

**Action: JH to write up minutes.**

AM gave an overview of the two new releases that have been scheduled for the next couple of months. JH confirmed that the previous meetings minutes were used to give the go ahead. The word processing will be released 3 November 2009 and PFC will be released Dec09/Jan10. AM gave a brief demo of what the word processing would look like. BB asked if something like this could be applied to the notes section. AMC confirms that it could; font, spell check, colours etc etc. The PFC will have workshops to test the system and help steer the final release. Both MB & BB asked how this would be sent to users. The online forum; newsletter and Dug will be used to get information to users. AM confirmed that the smaller enhancements raised by the development work will be work on at no extra cost. A schedule will be produced in the next 3 months.

**Action: AM to produce schedule for these updates.**

The developments from 19 June's meeting were discussed.

**Action: JH to report back to DUG on observations 1674 to 1708.**

AM indicated that the extra sub type for the postgraduate funding streams are available on the live site, CB to check. The standard reports that SU's wanted to added to AdvicePro essential need to be given to Res, Liam King (LK) to provide them.

**Action: LK to provide reports to Res**

AM produced the results of the AdvicePro user survey. The largest single item to come out of the survey was the timing out function of AdvicePro. Res indicated that as from 23 September 2009 the time out function will be disabled. Some of the DUG felt that there may be a security issue with people not being locked out of the system. AM said that it was the biggest source of helpdesk calls and felt that there was sufficient security built into the PC and good agency practices. RO thought a document explaining the change with tips on working securely should be released and this was supported by the group. MB thought the DUG should have been informed before the decision was taken to alter the system. AM said that the intention was not to work around the DUG but to address a problem which affected a larger number of users.

**Action: AM to produce rest of results for survey.**

With the actions from the previous meeting completed the discussion moved onto the case matter types and to a more over arching theme of tailoring AdvicePro for individual centres. The DUG felt that the system needs to balance establishing a sector standard and the needs of individual centres. AM explained that sub matters can be added to but not taken away, users found that long lists of matter types were not user friendly. A suggestion was to hide the categories in certain lists, this discussed lead onto standard default buttons in AdvicePro. Tailoring of the system at an agency level will be discussed further under point 4. Plan for next development year - 2010.

#### Development requests from observational framework & DUG

Please appendix 2 for detail.

1716 DUG thought it won't be a problem to add this.

**Action: AM to look into implementing.**

1717 AUK needs to make sure consistency in its surveys.

**Action: JH to make sure AUK works consistency.**

1724 AM said that anything can be added to drop down pages but would increase the choice for centres. The group questioned why these particular drop downs were needed. SD said that London Councils were increasing asking for these drop downs, MB agreed Birmingham were also.

**Action: AM to add to drop down.**

1742 BB reiterated that a default button could solve this problem, SV said that BAN would like the immigration selection extended.

**Action: AM to look into immigration coding.**

1752 DUG agreed this would be a very useful development.

**Action: JH to add to development list for next year.**

1777

MB agreed the search function needed to be re-vamped. The same problem cropped up that what is good for one agency is not applicable to others.

**Action: JH to add this to development list under "tailoring system"**

Plan for next development year - 2010

JH explained that the next DUG meeting would confirm the development to be put forward to the development board for 2010. The main ones are listed below:

Sub matters/Tailored system

As discussed before the DUG would like to be able to tailor their system to suit their agency. JHA said that it would bring the system up to what it was original sold. It was agreed that a system where agency were allowed to change AdvicePro would answer a lot of complaints about the system.

Printing summary

A printing summary or the client notes or case or LSC capture page.

Default agency button

Would fall under the sub matters/Tailored system but would allow centres to click on VAT etc etc.

Diary

The diary would allow a fully integration of appointments, tasks and work done. CL said that this had been "spec'ed" already. Res already working on a series of tool bars to help work move more smoothly.

**Action: JH to look at spec and distribute around DUG members.**

Security

RO felt that another layer of security is needed to counter the auto-fill on certain internet browsers, examples included a PIN to enter or users being asked to enter random letters of their password.

Receptionist/administrator role

Limited access to system, has been brought forward before the DUG before. Could be solved by the sub matters/Tailored system.

**Action: All of the above points need to be investigated by AUK and Res and presented to the DUG so they can make an informed decision for the 2010 development year.**

A.O.B

SD had brought queries form LCF users. The speed of the system was a problem for users. AM said that speed was down to your internet connection and the number of users the agency had logged on at anyone time. RO & BJ both wanted definitive answers to what was needed to run the system. AMC gave a minimum of 2mb broadband line but a 8mb was preferable.

MB asked about the cost of the word processor & PFC, CL said it would be treated like a premium service. MB went further and asked who funded the development of AdvicePro, CL said that a) all users pay through their subscription b) AUK and c) Resolution both invest money into the system.

CB said that the outcomes should be tailored to the matter type selected, SV agreed. JH said that other meetings with users had brought this to our attention and is being looked at.

**Action: JH to report back to DUG about developments.**

SD asked about training and the manuals for AdvicePro. AM said that a professional writer had been appointed and the estimated delivery date was the end of November. AM went onto to explain that as each section is completed they will be realised online. AM directed anyone who needed more information about training should contact Irene Harvey at Res.

CB said that he could attend future DUG meetings as long as they were not on a Wednesday.

**Action: JH to book next meeting for around the end of the November.**

Meeting ended 12:30

## **Appendix 1**

### **Observations/Enhancements**

#### **April - June 2009**

- 1674 Adhoc Reporting - Would like to be able to export the resulting report in a variety of different formats, eg. Text file, XL, DOC
- 1675 Could the postcode box validate the entry to prevent people typing in non-standard postcodes (ie those without a space in the middle)
- 1676 Case outcomes (financial) - Can we have a facility to work out the annual equivalent of any gain other than a lump sum.
- 1679 Can we have a check box added to case details for "work monitored"?
- 1683 Report required that specifies the date the last work completed item was added to each case.
- 1693 Can we report on sub matter types rather than the lower level more removed granular sub types?
- 1697 Can the drop down lists of users not show users that have been removed from the agency?
- 1698 Can the LSC summary page be printable?
- 1701 When creating a case can we have a pop up warning asking if we want to create a case with matter type 'XXX', please?
- 1702 Can Employment Type be renamed Employment Status, please?
- 1703 We need to log time spent at outreach but not for a specific client. Can this be achieved?
- 1704 When a new message is received can we have an audible signal or a pop up rather than the more subtle icon?
- 1705 Closing a case (especially an LSC one) is an important process. Can there be a button to do this rather than the more subtle change of case status?
- 1707 Income/Expenditure Add multiple page pre-selects a lot of entries for you. Would it not be better to remove these pre-selections as they are unlikely to be right and it takes time to de-select?
- 1708 Need joint names on the financial statement as opposed to only the client's name.

## **Appendix 2**

### **Observations/Enhancements**

#### **June - September 2009**

- 1716 For joint debts, could partner name show on financial statement.
- 1717 It has come to my attention that age categories differ between that of AdvicePro and that of Survey Monkey, which we are asked to fill in each month. Could you please change either one so it makes it easier for statistical data to migrate from one to another?
- 1724 Lambeth would like two new dropdown lists added to Client: Religion & Belief.
- 1742 Can the checker for invalid immigration codes be set so that it only works for LSC funded cases please? There are no other useful codes for recording immigration outcomes and stages, so we want to use the LSC page even for non-LSC work, but we don't need to comply with the incompatibility tests if we are not claiming money from the LSC.
- 1752 Is there a chance of a print button on the LSC Data Capture/Summary page? Attachment on bugzilla example.
- 1777 We have a large list of existing clients and the existing search does not make it easy to distinguish between them as many share the same names and they are all very mobile. Rather than displaying the full address I would like to see the postcode and the date of birth. Rather than the cases status I would like the last date status changed.