CRM Navigation Guide

Department of Developmental Disabilities

June, 2015

1. Introduction

Welcome to the LOC Tool which was developed using Microsoft Dynamics CRM 2013. Over the past several years CRM (**Customer Relationship Management**) systems have been developed for other types of "customers" in fields outside of traditional sales, marketing and service organizations. This includes other fields such as government, press, not-for-profits, etc. Therefore, here at DODD out of the box Microsoft Dynamics CRM has been *extended* or *customized* to address the business requirements of a growing number of projects including imagineIS, Reviews Data System (RDS), and Level of Care (LOC) system, to name a few examples.

The LOC Tool is an example of out of the box Dynamics CRM 2013 being extended or customized to meet the needs of DODD's "customer" – the individual being served by County Boards, providers and DODD. The LOC Tool has been developed as *a central repository to store key demographic information on individuals* served by County Boards, providers and DODD. In addition to the LOC tool, other functionality has been developed on the CRM platform including imagineIS, Case Notes, Review Data System (RDS), and Restrictive Measures Notification (RMN).

2. Purpose

The purpose of this guide is to give a brief overview of the general navigation that is found in Microsoft Dynamics CRM 2013 and in doing so shed some light on several fundamental pieces of functionality that form the building block of navigation and working within CRM.

Note: The information contained within this document, by and large, is irrespective of which application (imagineIS, LOC, RDS, etc.) that the user is accessing within the CRM framework. The concepts and terminology (see Glossary of Terms) covered here within are applicable across all applications.

3. Additional Support

a) For more information on CRM, including links to videos and user guides, please visit:

   http://dodd.ohio.gov/Training/Pages/CRMTraining.aspx

b) Questions related to **LOC applications** can be sent to LOC@dodd.ohio.gov.
c) Questions related to **IDS** can be sent to IDS.support@dodd.ohio.gov.
d) Microsoft Dynamics CRM 2013, like any enterprise level software system, has plenty of documentation, tutorials and resources to assist in better end user understanding and adoption. Many of them come directly from Microsoft but there are plenty of third party books, blogs and web sites dedicated to supporting the Microsoft Dynamics CRM community.

   Here is a brief list of a resources with plenty of information to help users ramp up on CRM:

   http://www.microsoft.com/en-US/dynamics/crm-customer-center/

   http://www.microsoft.com/en-us/dynamics/crm-customer-center/get-started-top-links.aspx

   http://www.amazon.com/CRM-2013-QuickStart-David-Yack/dp/0981511872/ref=sr_1_2?s=books&ie=UTF8&qid=1433877852&sr=1-2&keywords=crm+2013

Note: Out of the box Microsoft Dynamics CRM focuses on *sales, marketing and service* exclusively. As a result, many of the native concepts, terms, reports, etc. are focused in these areas as well. Therefore, if you are searching for more information about an individual the out of the box reference materials may not have anything related to individual. That is because **individual** (In the LOC system, for example) has been *customized* – renamed essentially – from the out of the box CRM entity called **account**.

4. System Requirements

a) Web Application Requirements for Microsoft Dynamics CRM 2013

https://technet.microsoft.com/en-US/library/hh699710(v=crm.6).aspx

Component	Minimum	Recommended
Processor	2.9 gigahertz (GHz) or faster x86- or x64-bit dual core processor with SSE2 instruction set	3.3 gigahertz (GHz) or faster 64-bit dual core processor with SSE2 instruction set and 3 MB or more L3 cache
Memory	2-GB RAM	4-GB RAM or more
Display	Super VGA with a resolution of 1024 x 768	Super VGA with a resolution of 1024 x 768

Supported IE versions
Internet Explorer 11
Internet Explorer 10
Internet Explorer 9
Internet Explorer 8

Operating System	Supported IE Browsers
Windows 8.1	IE 11
Windows 8	IE 10
Windows 7	IE 8 - IE 11
Windows Vista	IE 8 - IE 11

Supported non-IE browsers	Version Supported	Operating System
Mozilla Firefox	latest publicly released version	Windows 8.1 or 8.0, Windows 7, or Windows Vista
Google Chrome	latest publicly released version	Windows 8.1 or 8.0, Windows 7, or Windows Vista, or Google Nexus tablet
Apple Safari	latest publicly released version	Mac OS X 10.8, Mac OS X 10.9, Mac OS X 10.10

5. Register Associate

Register Associate is a web-based account generation system designed to allow users to request an account, have the requested account be approved and created with rights preconfigured to allow them to perform their job role.

Https://registerassociate.prodapps.dodd.ohio.gov

Before County Board and provider users can access the LOC Tool they will first have to create an account through Register Associate.

For supporting documentation on the Register Associate process please see “SEMS User Guide – Register Associate”

6. Getting Started

a) **Logging In**

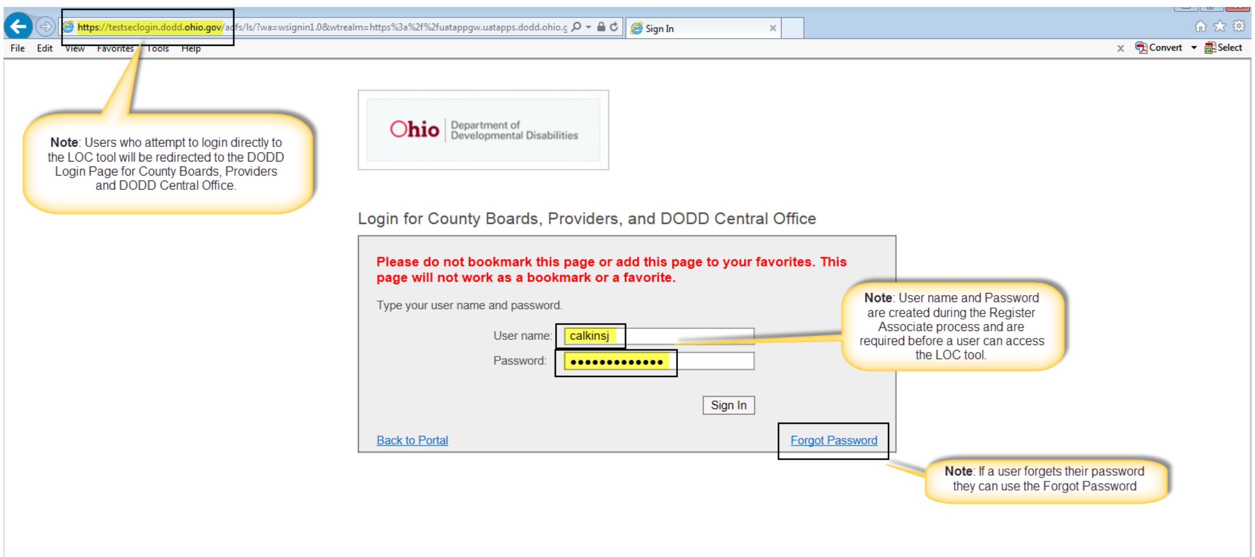
Users from County Boards, Providers and DODD Central Office will have a unique URL to access the LOC tool.

UAT:

Https://imagine.prodapps.dodd.ohio.gov

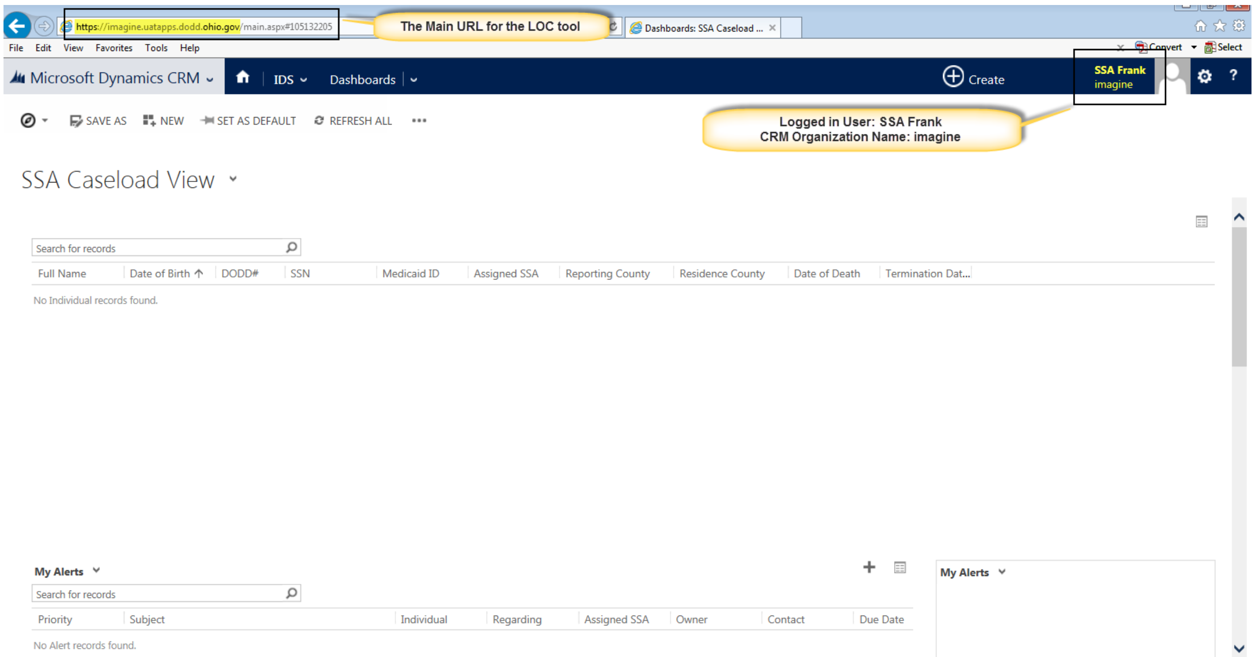
Please note: When users navigate directly to the link above (or bookmark the link) they will be automatically re-directed to the DODD login page:

Https://login.dodd.ohio.gov



Note: The user must enter the **User name** and **Password** that was created using the Register Associate process (Refer to Section 5 - Register Associate for more information). The user can also click the **Forgot Password** link which allows them to reset their password.

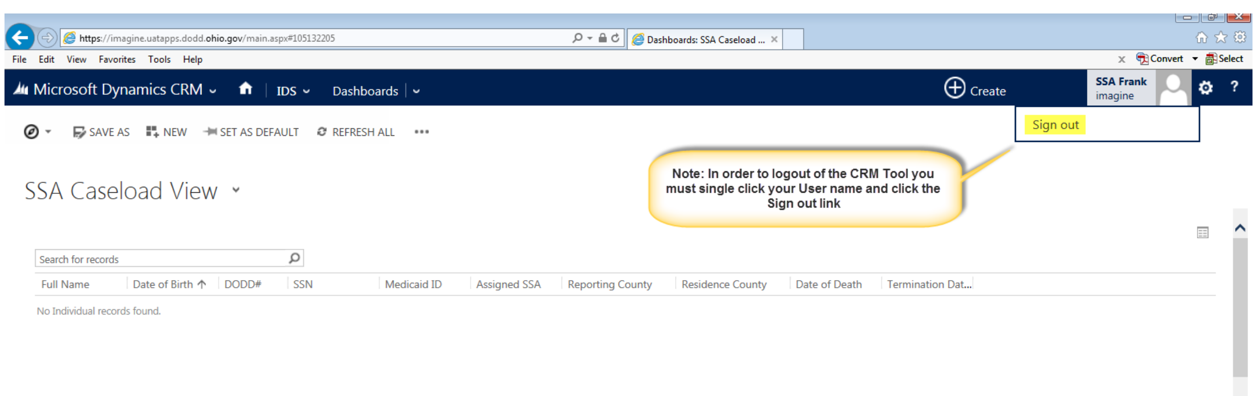
Only after entering your User name and Password will you be logged into the LOC Tool.



Note: The main URL will be Https://imagine.prodapps.dodd.ohio.gov. The logged in user will be displayed in the top right hand corner of your browser along with the name of the CRM Organization

b) **Logging out**

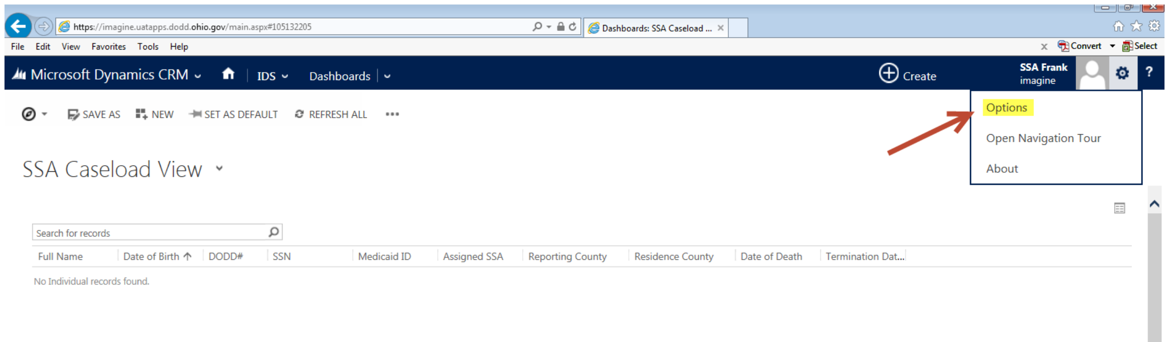
In order to logout from the CRM Tool the user must click his/her User name and then click the **Sign out** button.

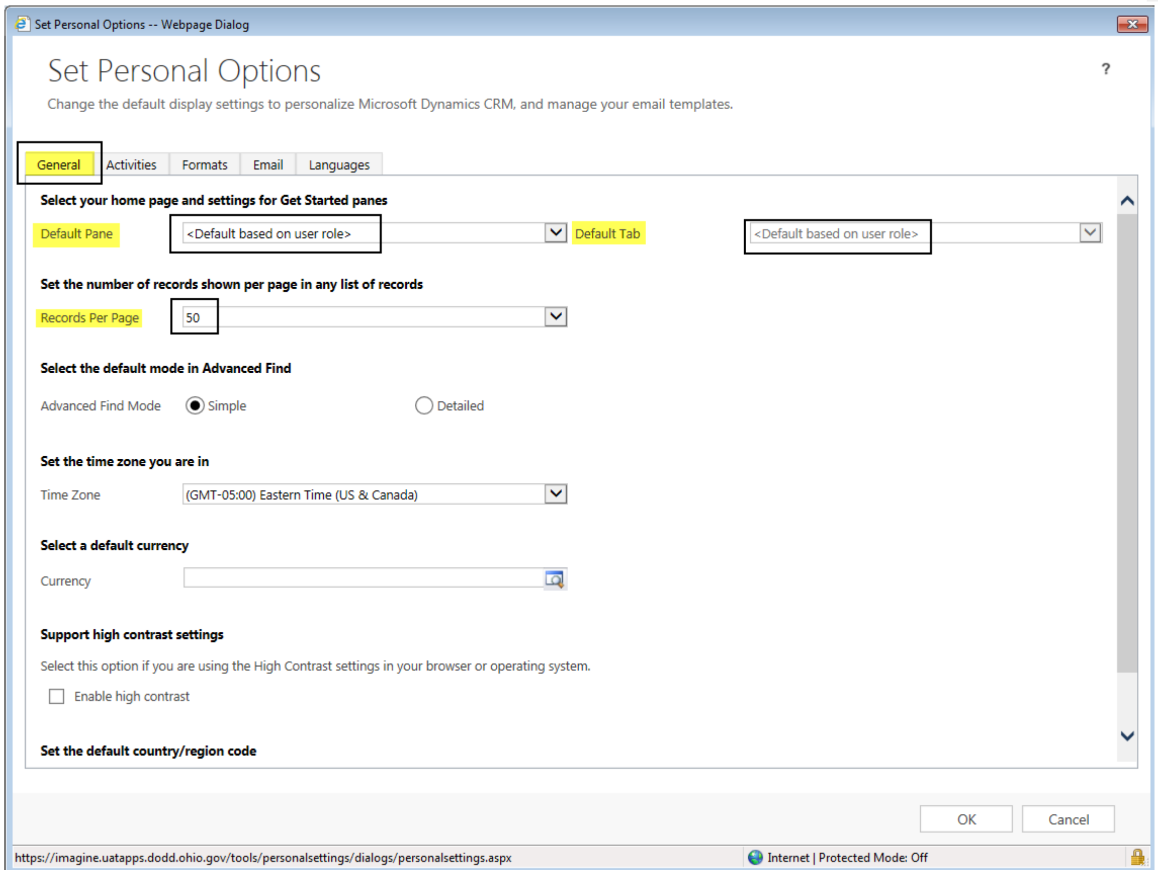


c) **Settings**

1) **Options**

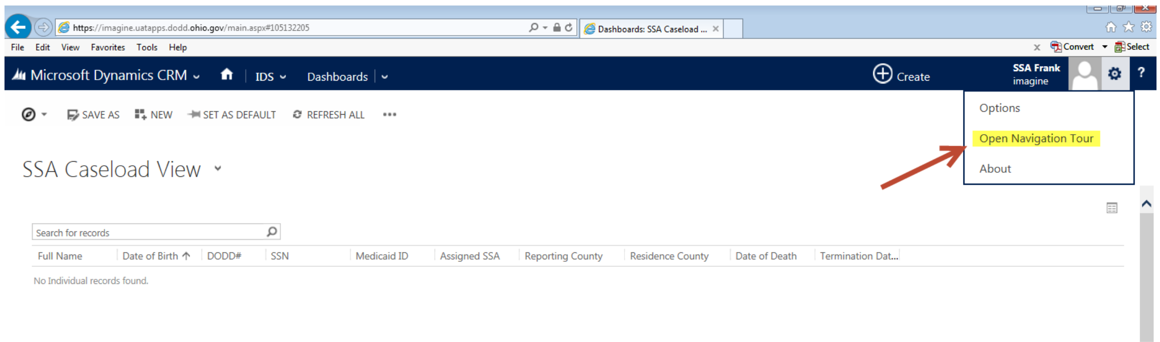
Helpful Hint: On the **General** tab >> Update the **Default Pane**, **Default Tab** and **Records Per Page** dropdowns to meet your personalized preference.

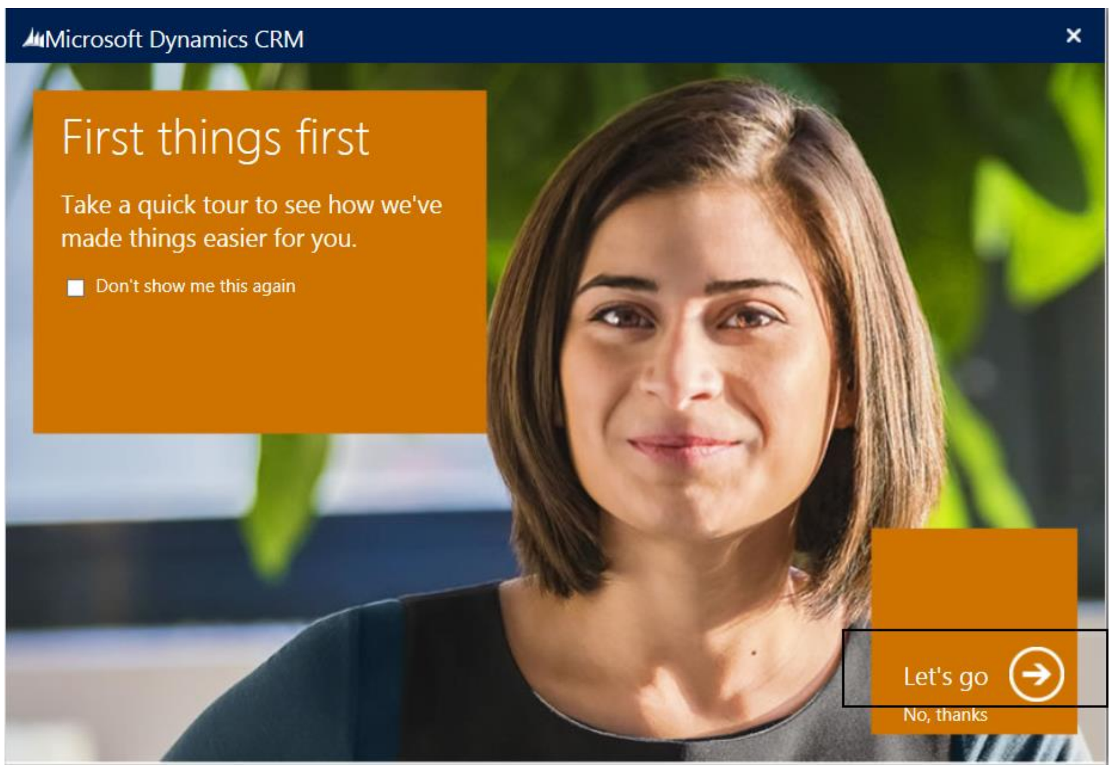

https://imagine.uatapps.dodd.ohio.gov/main.aspx#105132205
Dashboards: SSA Caseload ...
File Edit View Favorites Tools Help
Convert
Select
Microsoft Dynamics CRM
IDS
Dashboards
Create
SSA Frank
imagine
SAVE AS
NEW
SET AS DEFAULT
REFRESH ALL
Options
Open Navigation Tour
About
SSA Caseload View
Search for records
Full Name
Date of Birth
DODD#
SSN
Medicaid ID
Assigned SSA
Reporting County
Residence County
Date of Death
Termination Dat...
No Individual records found.


Set Personal Options -- Webpage Dialog
Set Personal Options
Change the default display settings to personalize Microsoft Dynamics CRM, and manage your email templates.
General
Activities
Formats
Email
Languages
Select your home page and settings for Get Started panes
Default Pane
<Default based on user role>
Default Tab
<Default based on user role>
Set the number of records shown per page in any list of records
Records Per Page
50
Select the default mode in Advanced Find
Advanced Find Mode
Simple
Detailed
Set the time zone you are in
Time Zone
(GMT-05:00) Eastern Time (US & Canada)
Select a default currency
Currency
Support high contrast settings
Select this option if you are using the High Contrast settings in your browser or operating system.
Enable high contrast
Set the default country/region code
OK
Cancel
https://imagine.uatapps.dodd.ohio.gov/tools/personalsettings/dialogs/personalsettings.aspx
Internet | Protected Mode: Off

2) Open Navigation Tour

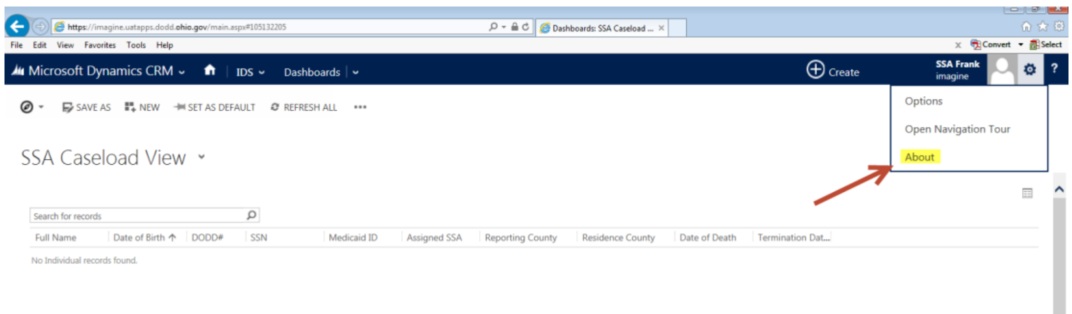
This out of the box feature gives a brief tour of CRM catering to Sales, Service and Marketing and may not provide much value for users of the LOC Tool.





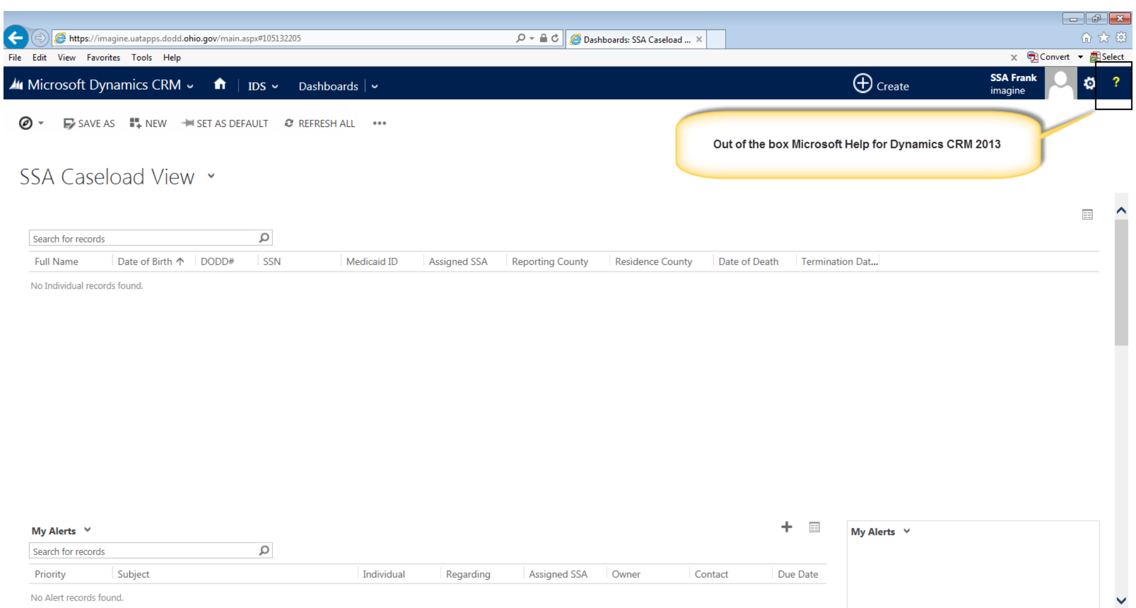
3) About

The About section provides valuable information about the version of CRM (and its database) and the CRM Organization name.



d) Help

This out of the box feature caters to Sales, Service and Marketing and may not provide much value for users of the LOC Tool.

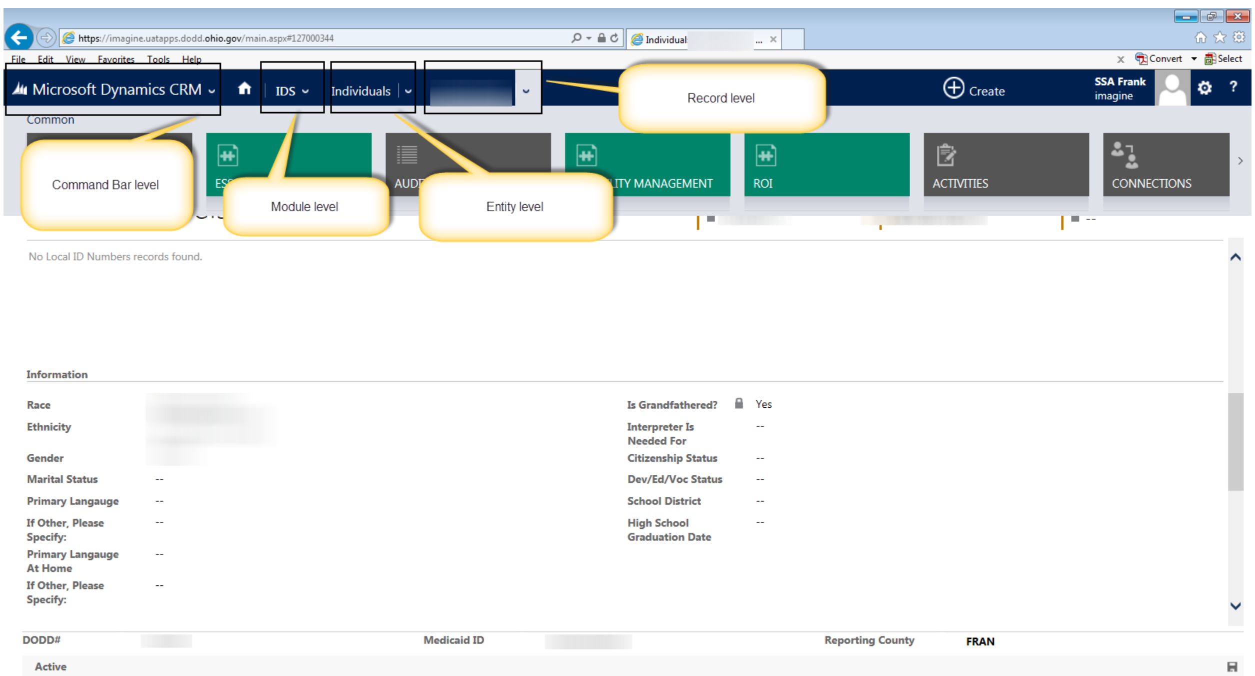


7. CRM Navigation

Hierarchical Navigation

The command bar at the very top (left) of the screen controls the entire navigation of CRM. The hierarchy of the navigation goes from left to right (**Command Bar** >> **Modules** >> **Entities** >> **Records**). Therefore, the user selects the **module** (e.g. IDS, Portals, Review Data System) from the **Command Bar**, then selects the **entity** (which type of record) and finally an individual **record**.

Note: What appears on the command bar is controlled by the access levels specified under security roles, as well as the site map, both of which may be modified by the system administrator.

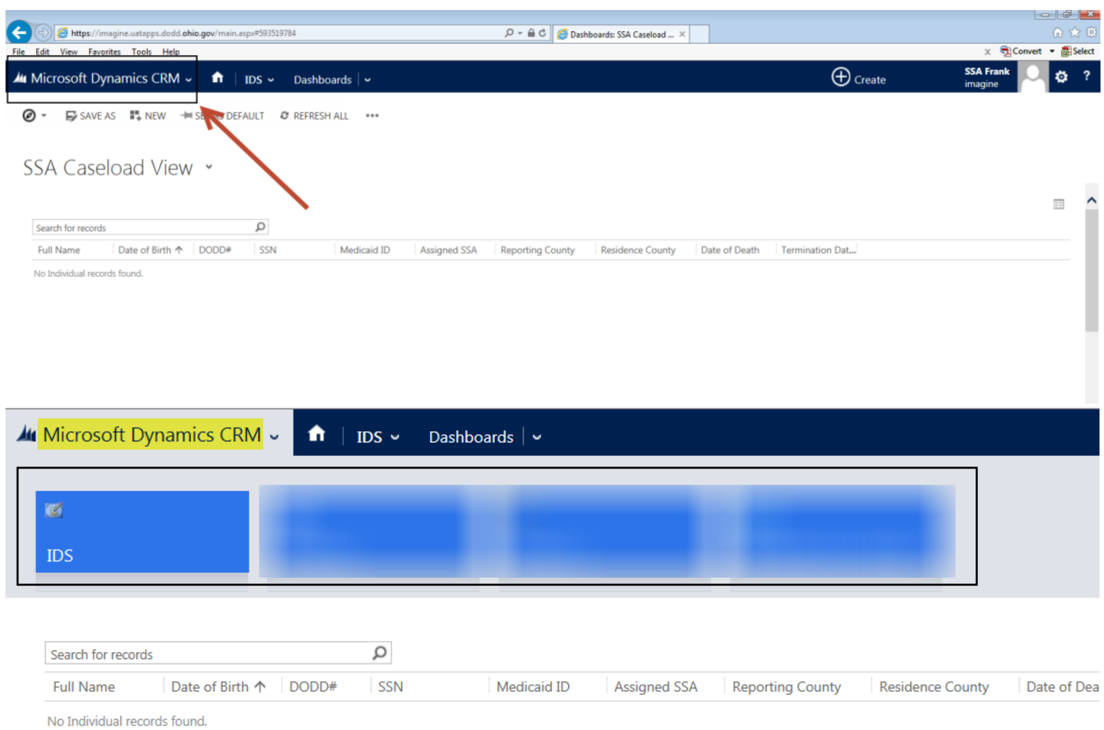


a) Command Bar

The command bar is used as the navigational tool for everything you do within the LOC system. As you can see, there are several buttons that direct and filter where you can go.

1) Microsoft Dynamics CRM

- This dropdown button allows you to drill down or go into the various modules built within the system.
- Modules include:
  - ✓ IDS
  - ✓ Portals
  - ✓ Review Data System

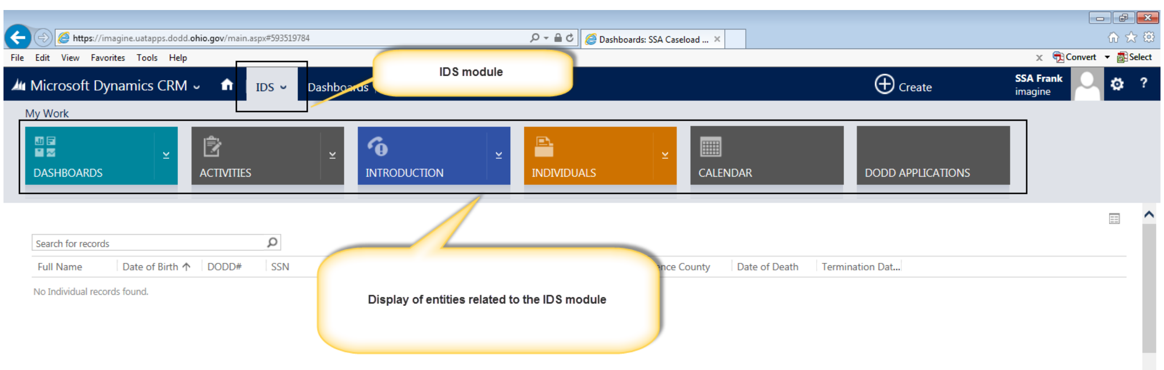


2) Home

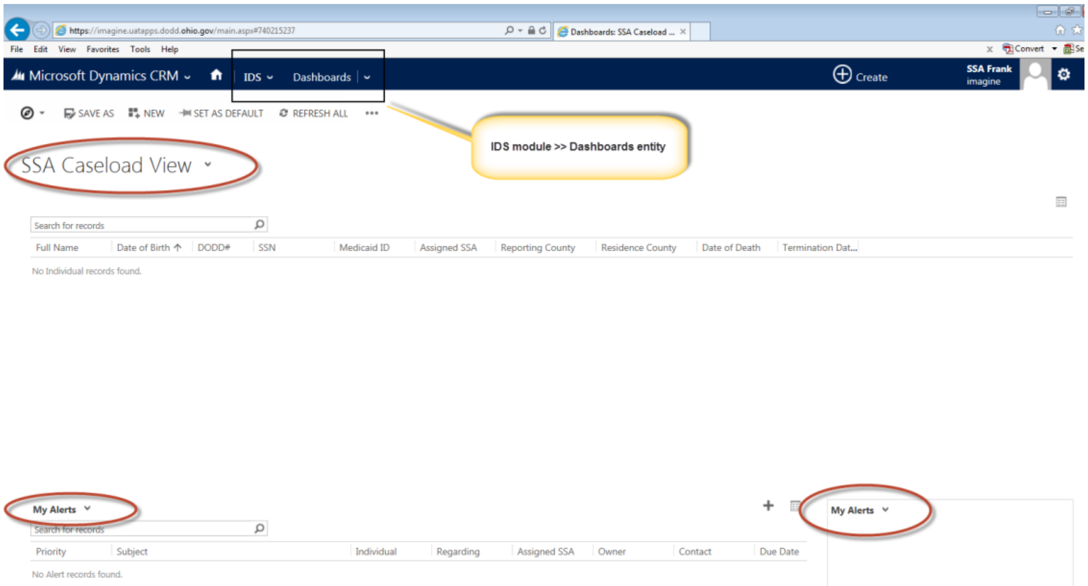
- Clicking on the icon of a house will take you to your homepage.

3) Module Button

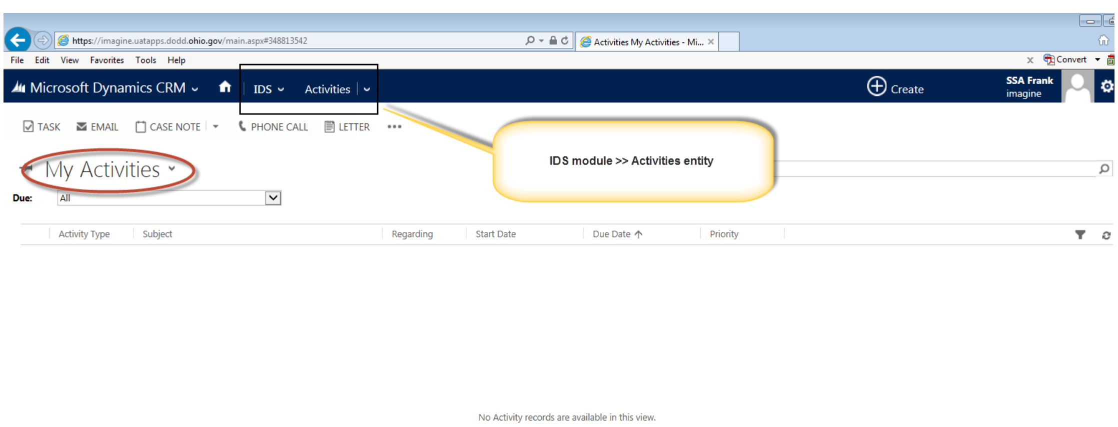
- When an applicable module has been selected, whether it be IDS, Portals or Review Data System, the module button will display the selected module and give access to its related records.
- These modules include:
  - ✓ Dashboard
  - ✓ Activities
  - ✓ Introduction
  - ✓ Individuals
  - ✓ Calendar
  - ✓ DODD Applications



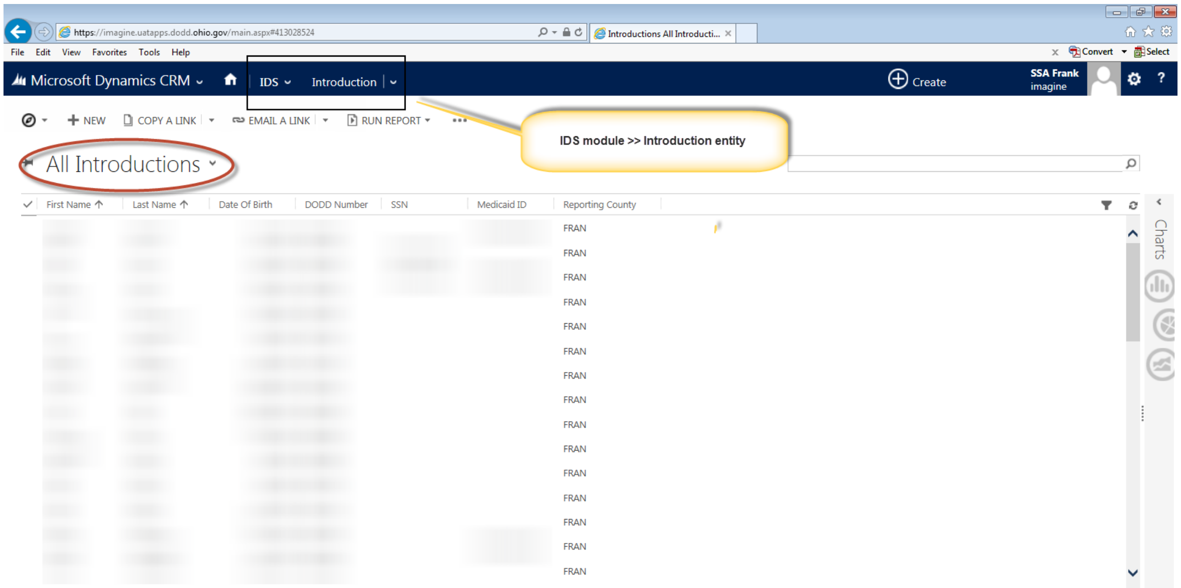
IDS module >> Dashboard entity



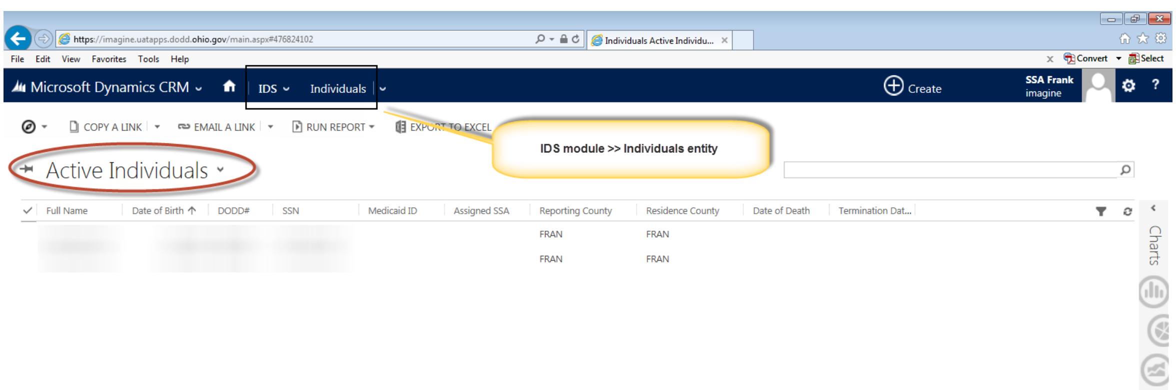
IDS module >> Activities entity



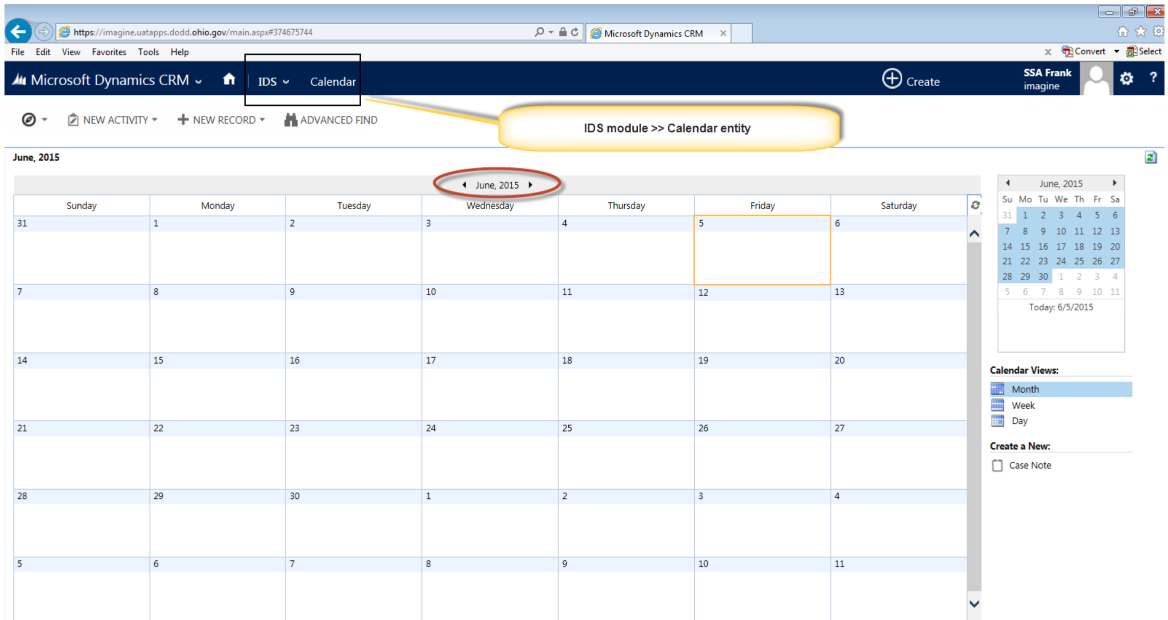
IDS module >> Introduction entity



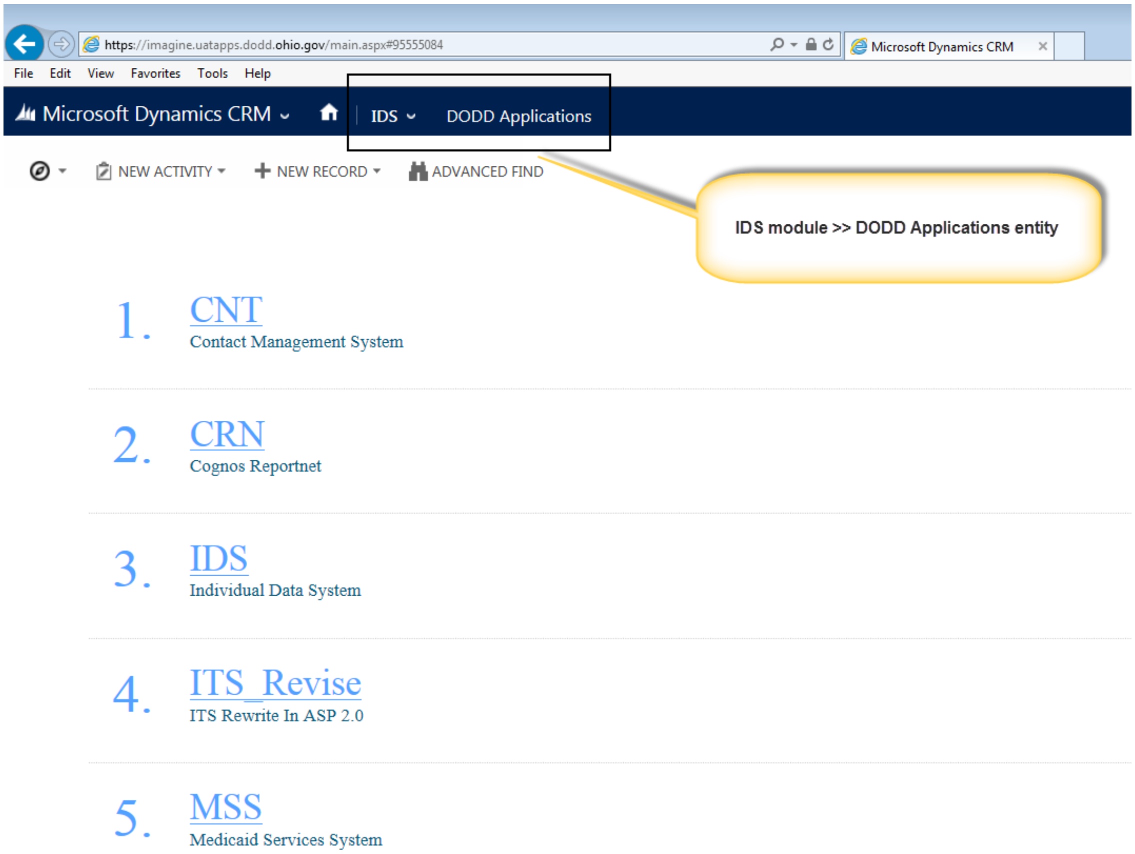
IDS module >> Individuals entity



IDS module >> Calendar entity



IDS module >> DODD Applications entity

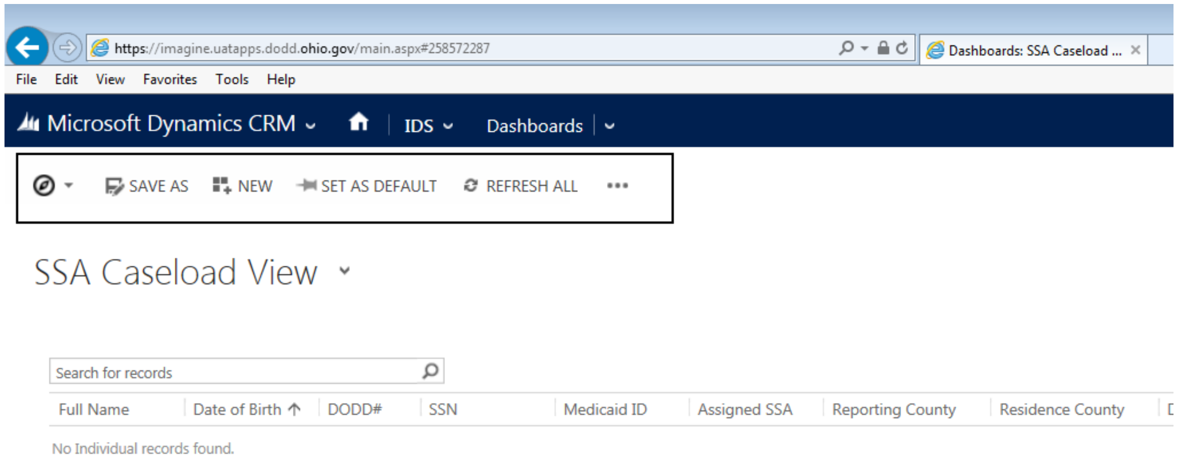


b) Ribbon

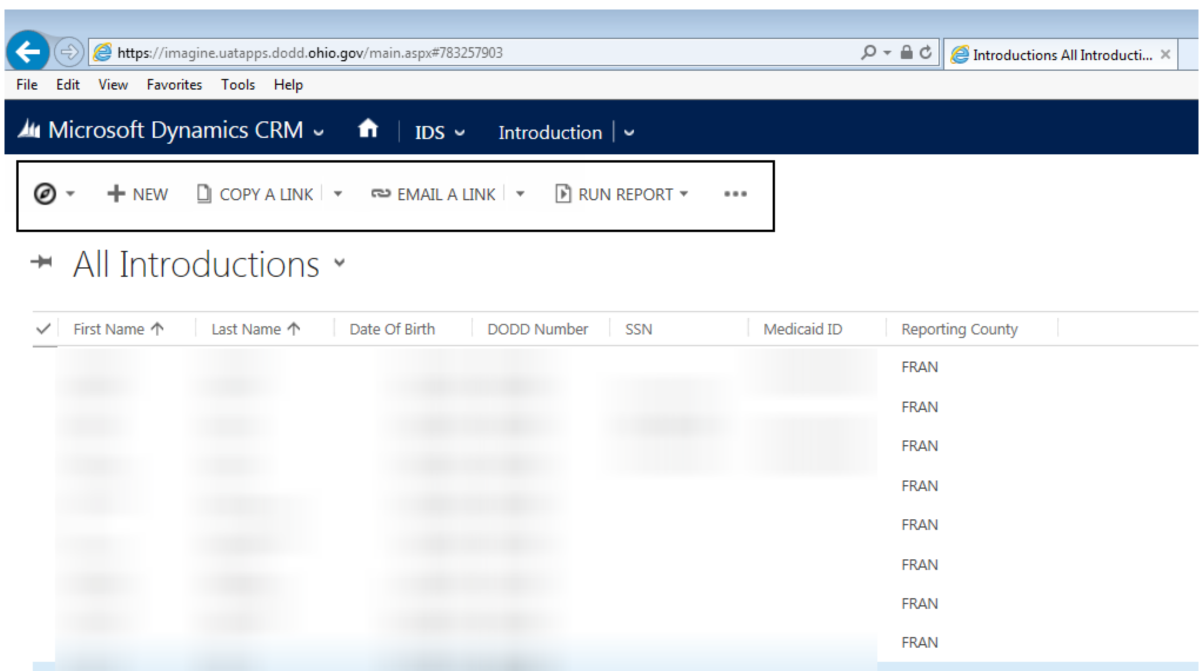
The Ribbon or commands are located at the top of every screen (just below the Command Bar) that you are on in CRM. It is simply a list of actions that can be performed on the information that is presented on the form. It is important to note that the commands available will vary depending on what entity the user is examining.

Below are three examples of commands that a user can perform on entities within in the LOC Tool.

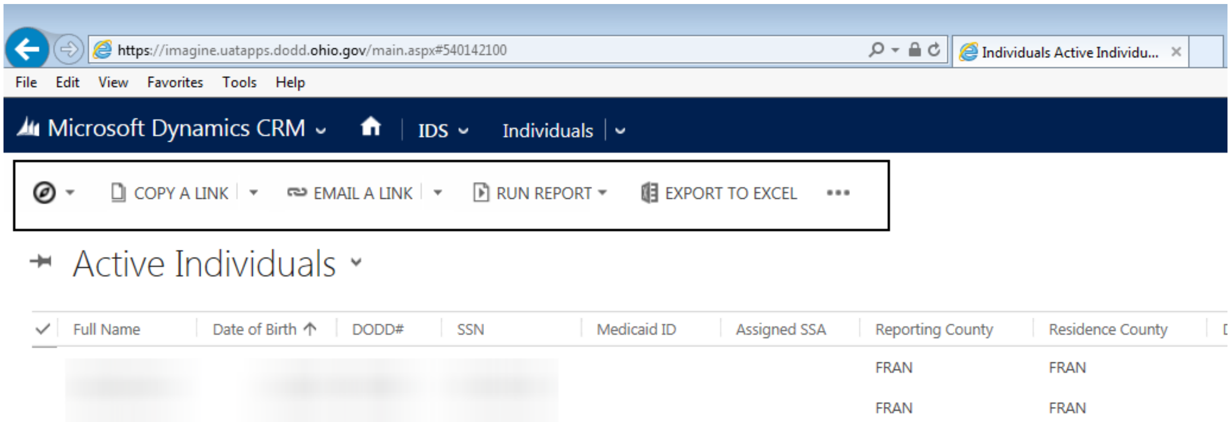
1) Home



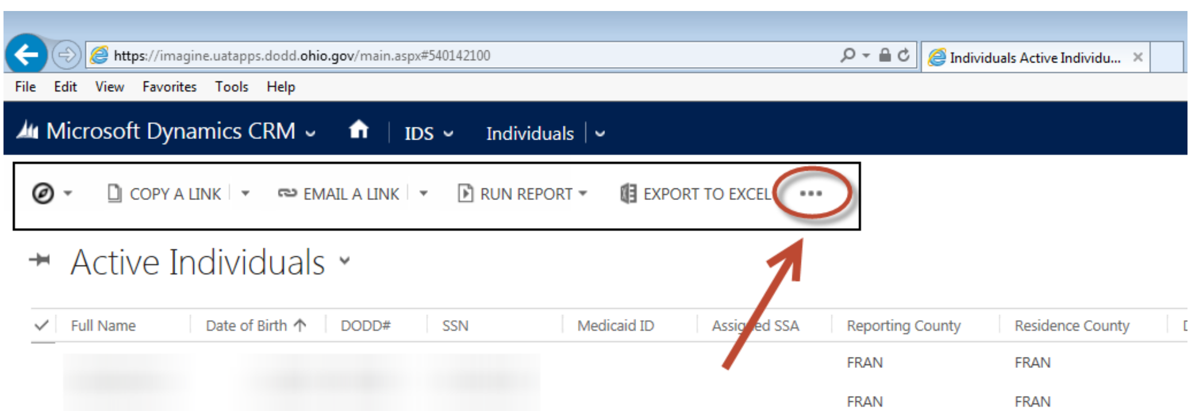
2) Introduction

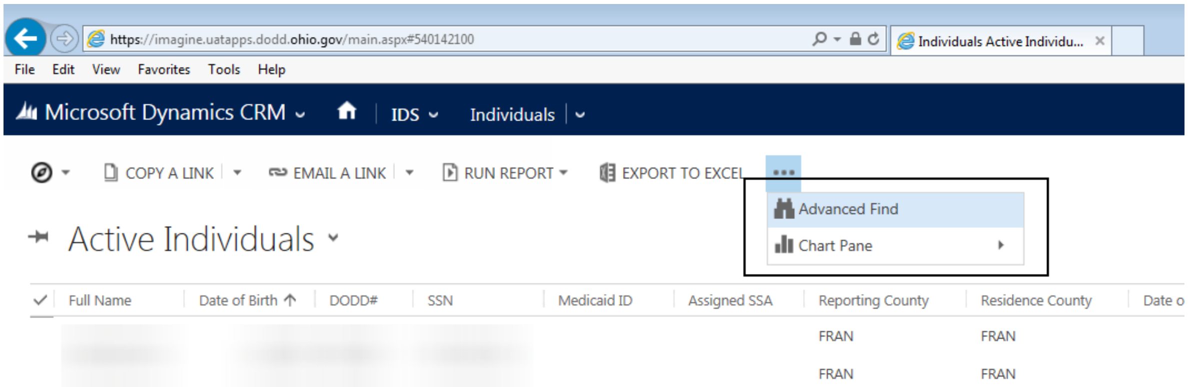


3) Individuals



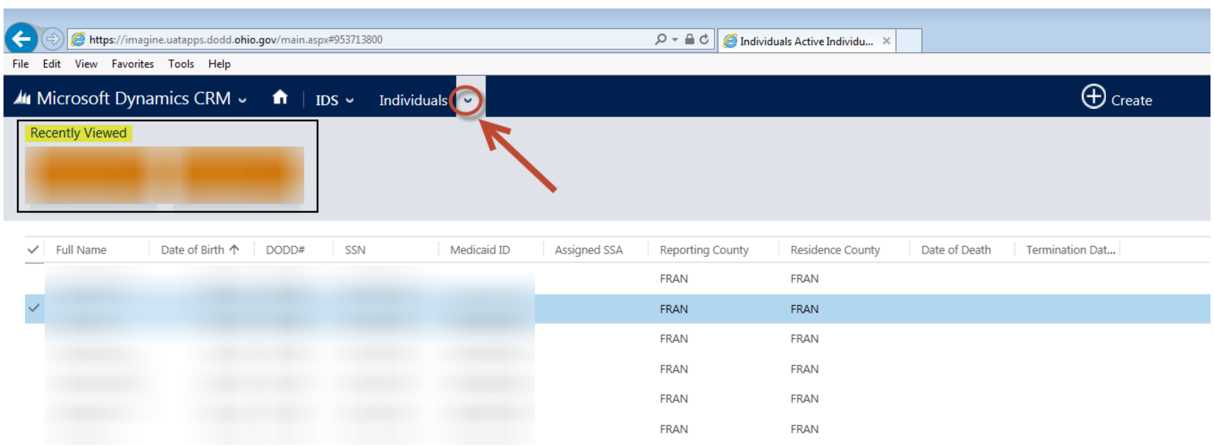
Note: In most cases the last icon in the Ribbon will be the **ellipses** (…). Clicking the ellipses simply opens up *additional* commands that are available for that entity. The list of commands off of the ellipses, like the Ribbon itself, will vary depending on what entity the user is examining.





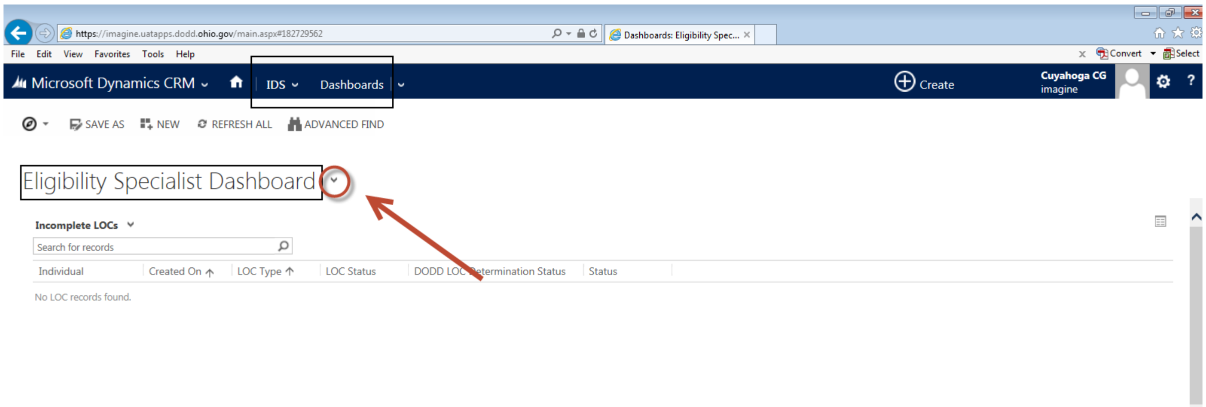
c) Recently Viewed

Selecting the arrow to the right of the entity provides the user with a list of records the user recently viewed. This is a helpful feature that allows the user to quickly go back to find a record without having to search again.

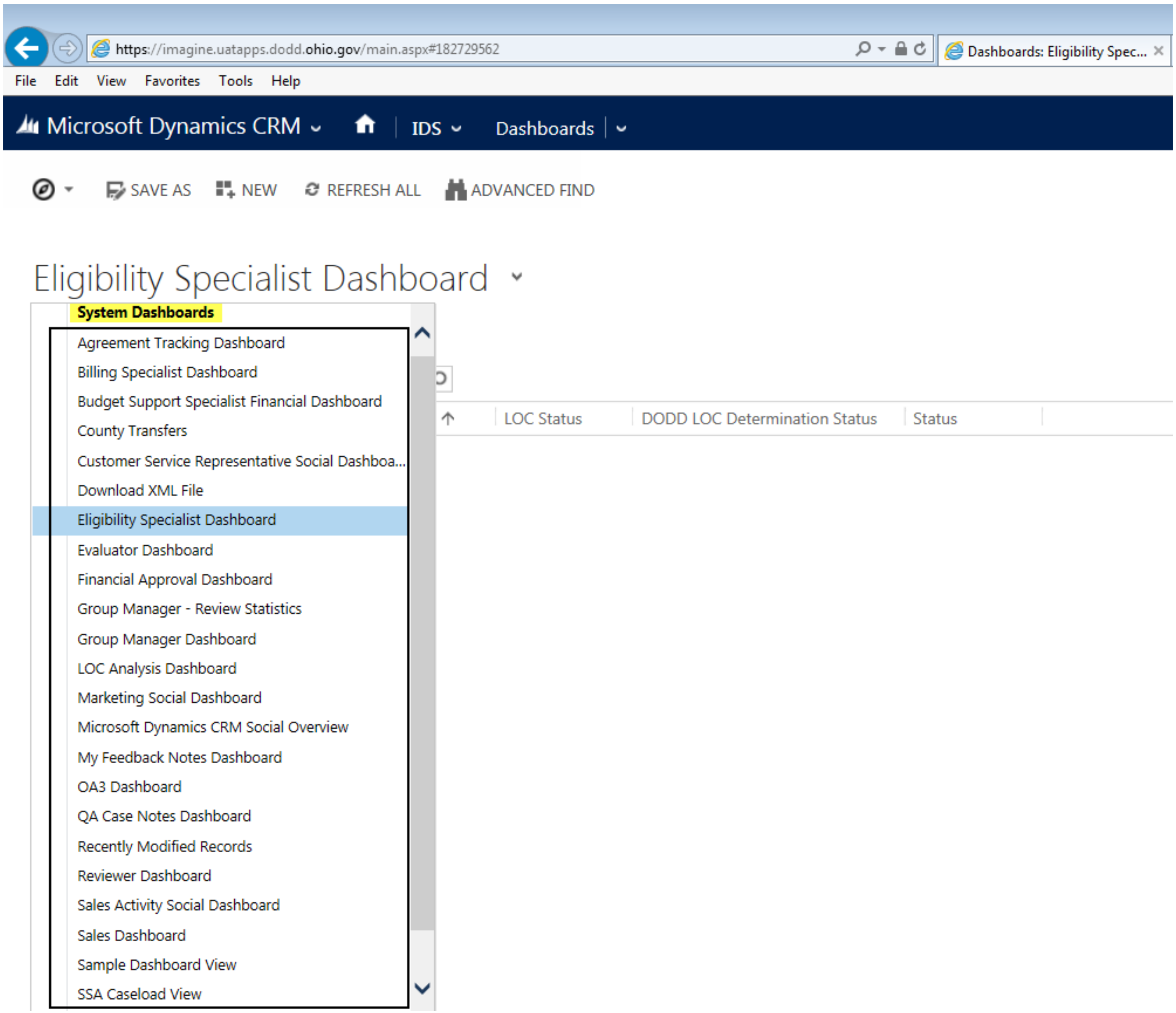


8. Dashboards

Microsoft Dynamics CRM dashboards are collections of view lists, charts and iFrames that can pull in things like website information that you can modify to show key performance indicators and other important data.

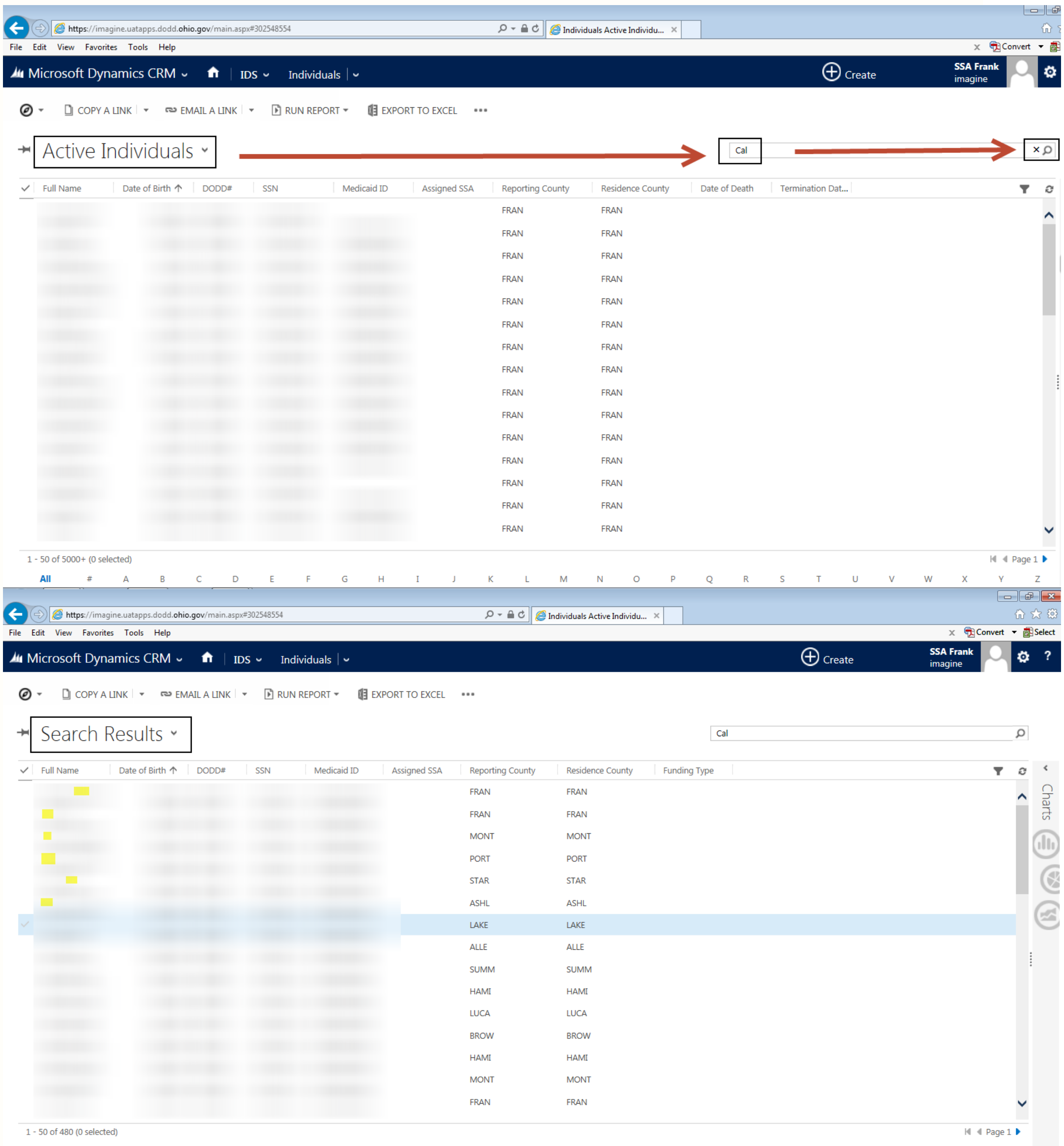


The LOC System comes with a long list of delivered Dashboards. The dropdown list will be populated with only those dashboards that the user has access to.

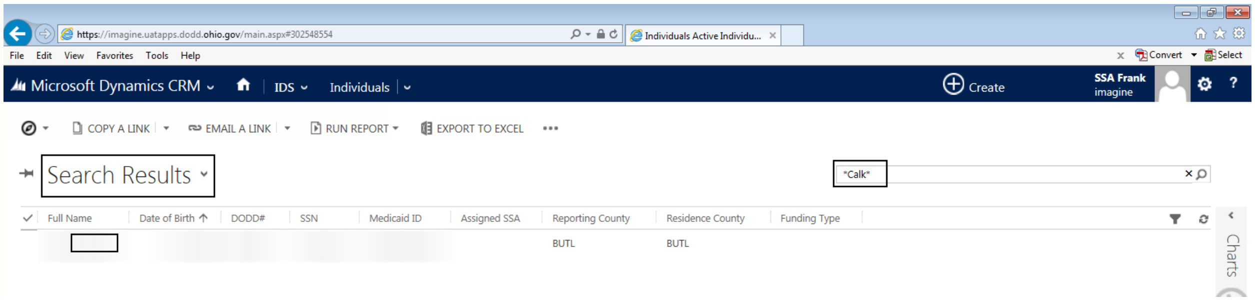


9. Quick Search

On the top right of each grid view, you can search that record-type in CRM using the quick search box. Search is not case sensitive. The easiest way to search is to put in as few characters as possible. So if looking for Full Name that contains "Cal", you might consider typing just "Cal" (no quotes).



Use an asterisk before your search to indicate you are looking for something that contains those characters. This is called a wildcard search. So, if you are looking for “Calkins”, but there are a lot of “Cal”, you might consider typing “*Calk*” to find it.



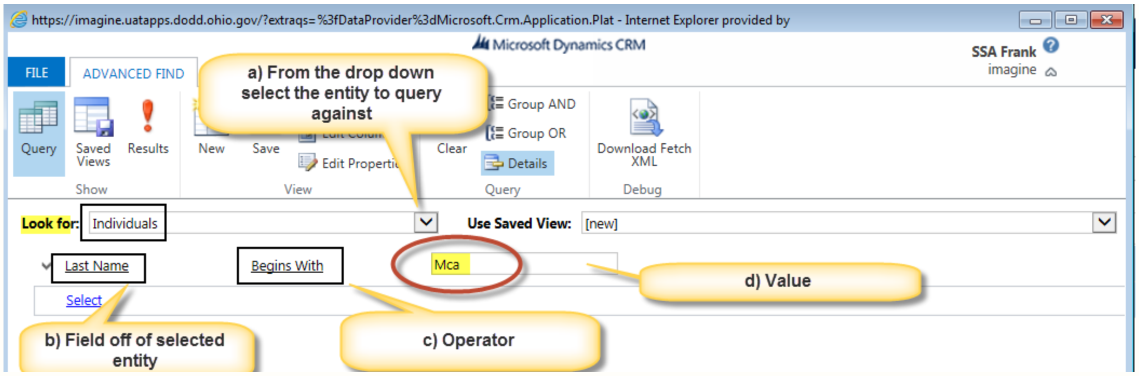
10. Advanced Find and Views

An **Advanced Find** is powerful query tool that allows users to create custom queries for all entities in the system for which the user has access. When the results of an Advanced Find are saved they are called a **View**. Advanced Find results can also be exported to Microsoft Excel for easy data processing outside of CRM.

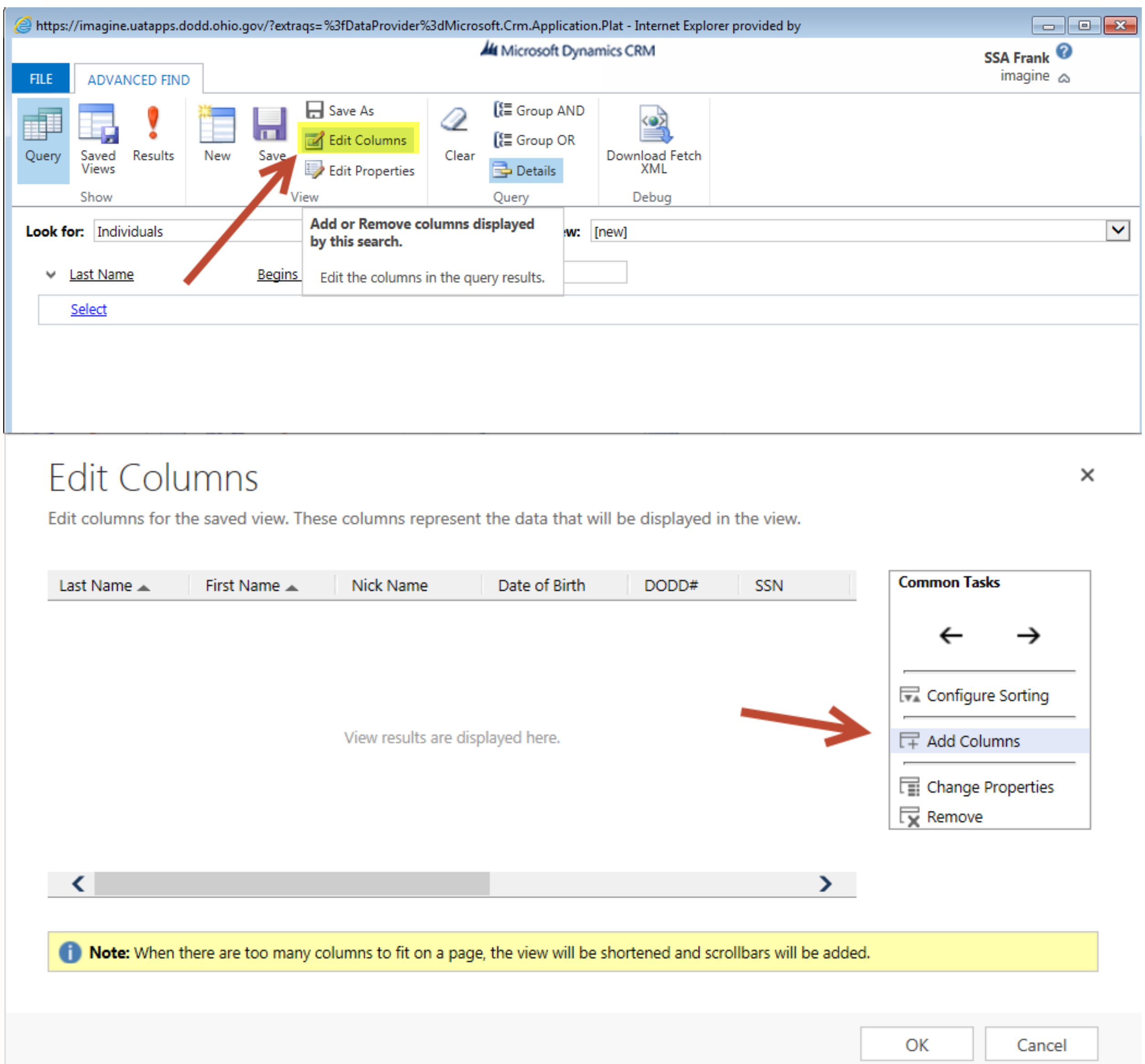
A **View** in Microsoft Dynamics CRM consists of two parts:

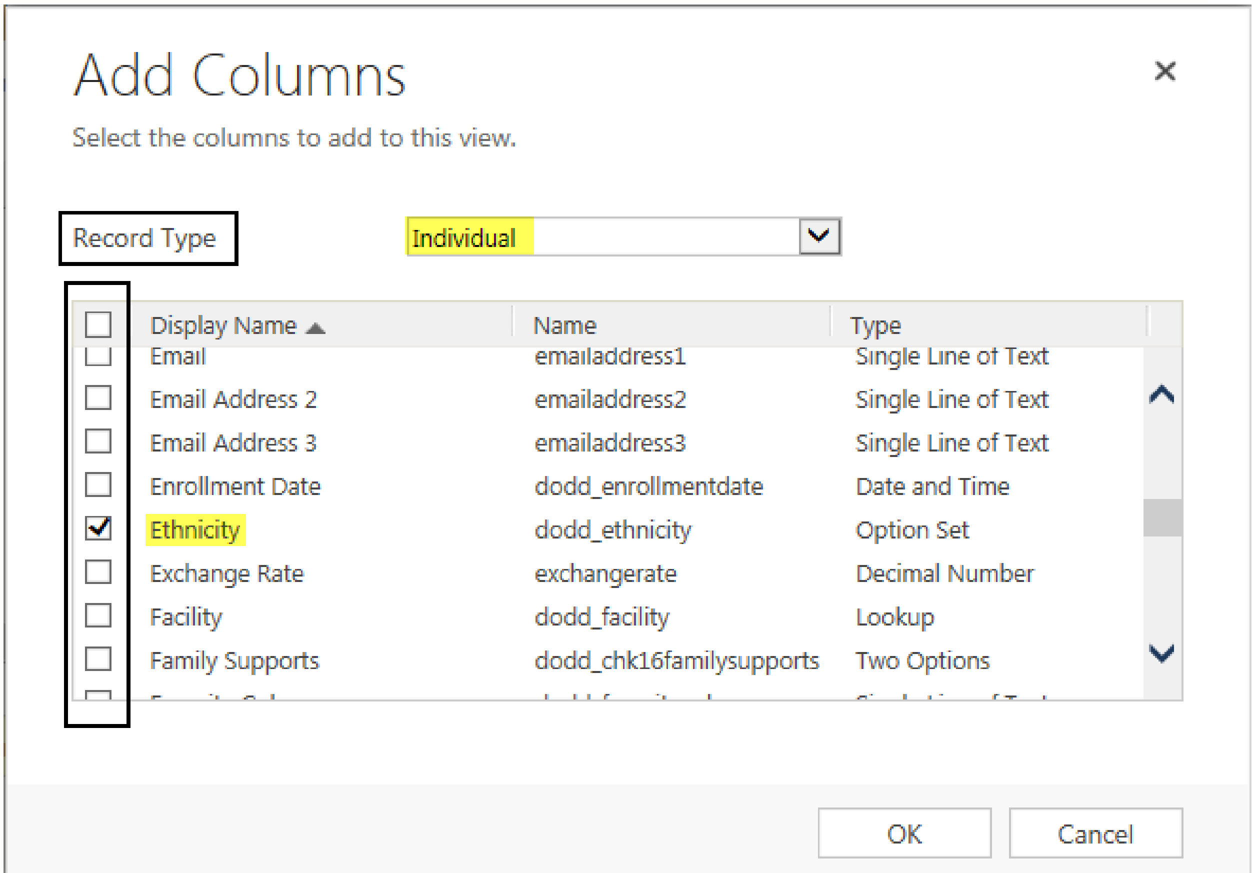
1. **A query of records** - based on selection criteria.
   a) **Look for** - Dropdown that allows user to select an entity to query against
   b) **Field** - Dropdown that allows user to select any field for the selected entity
   c) **Operator** – Dropdown that allows user to select an operator for the field
   d) **Value** – Allows user to input value / criteria to be queried

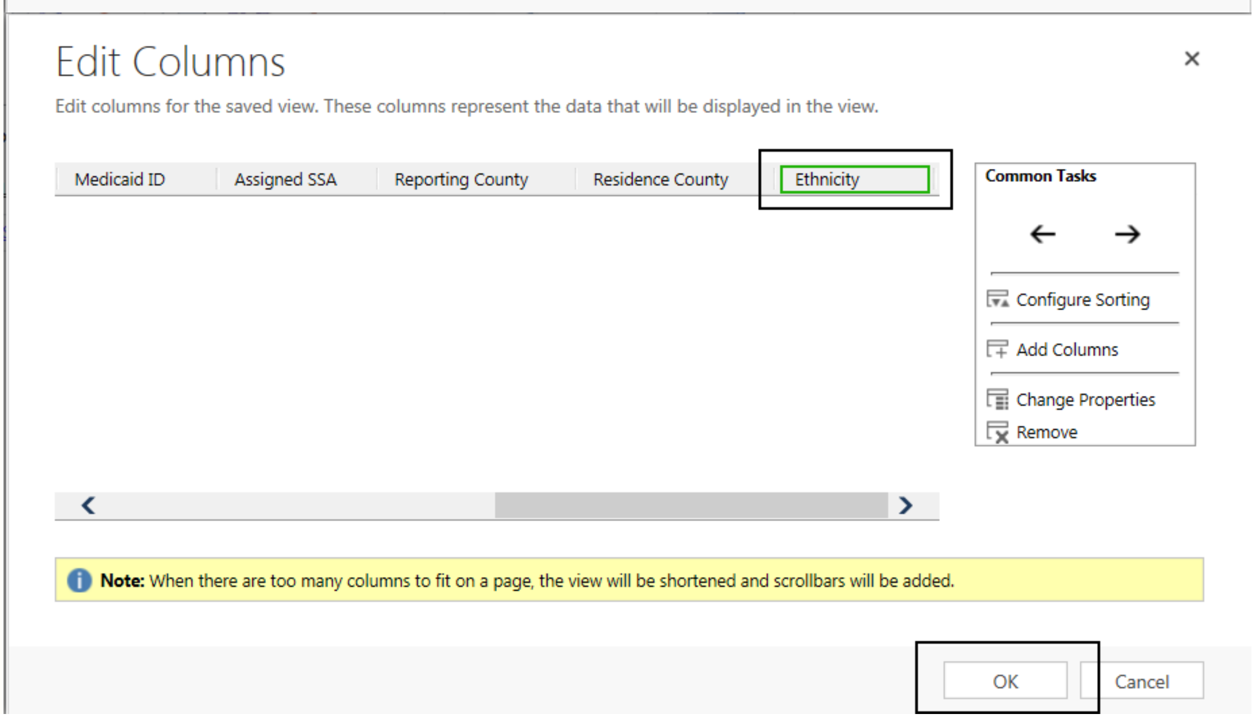
   Note: Access to entities and fields depends on the security granted to the logged in user. In addition, operators will vary depending on the data type of the field. Ex. A text field will have different operators than a date field.

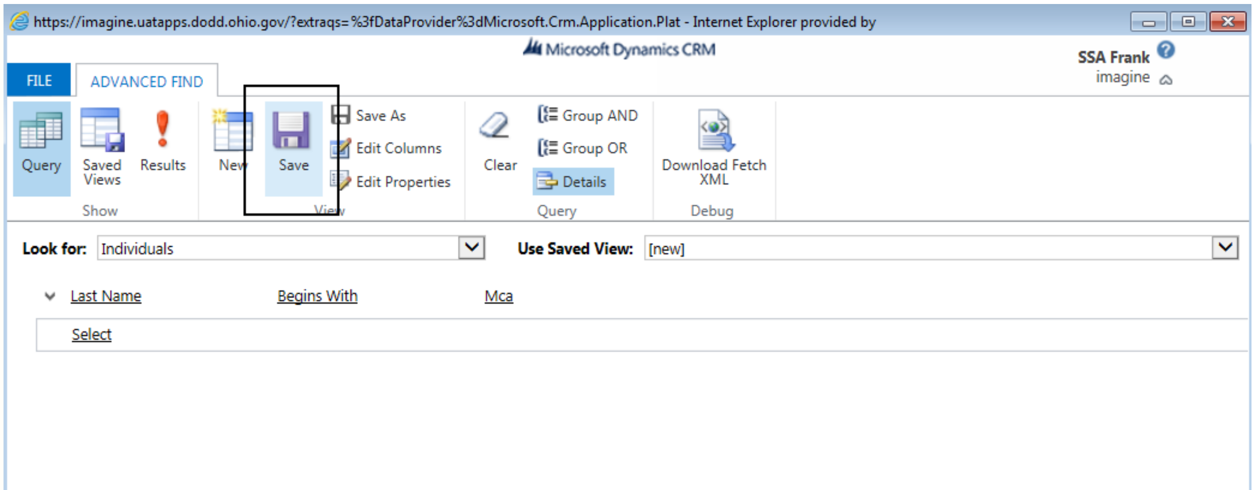


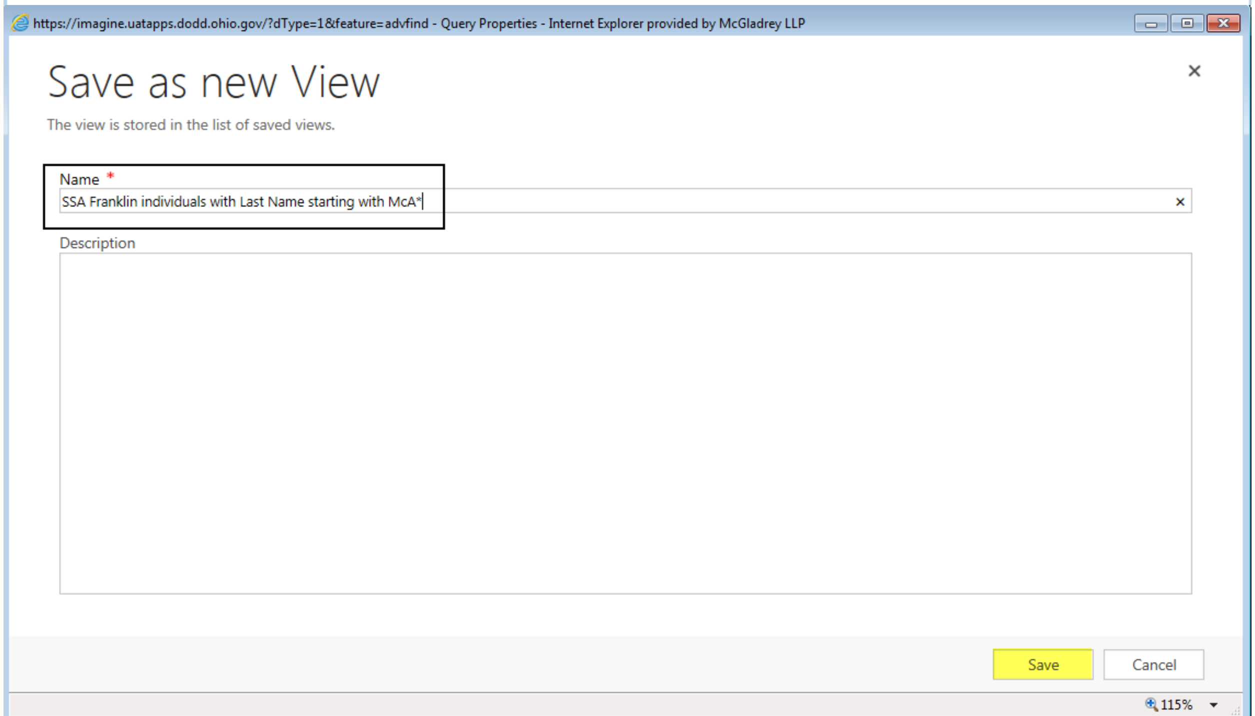
2. A layout – defined output of columns, the order of the columns, the width of the columns and sorting of the columns, etc.

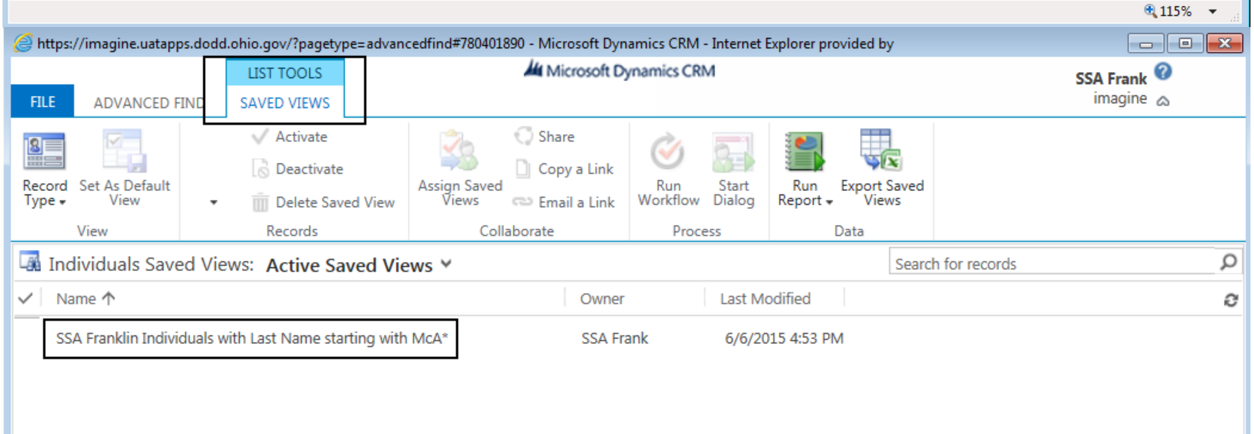



Add Columns
Select the columns to add to this view.
Record Type
Individual
Display Name
Name
Type
Email
emailaddress1
Single Line of Text
Email Address 2
emailaddress2
Single Line of Text
Email Address 3
emailaddress3
Single Line of Text
Enrollment Date
dodd_enrollmentdate
Date and Time
Ethnicity
dodd_ethnicity
Option Set
Exchange Rate
exchangerate
Decimal Number
Facility
dodd_facility
Lookup
Family Supports
dodd_chk16familysupports
Two Options
OK
Cancel


Edit Columns
Edit columns for the saved view. These columns represent the data that will be displayed in the view.
Medicaid ID
Assigned SSA
Reporting County
Residence County
Ethnicity
Common Tasks
Configure Sorting
Add Columns
Change Properties
Remove
Note: When there are too many columns to fit on a page, the view will be shortened and scrollbars will be added.
OK
Cancel


https://imagine.uatapps.dodd.ohio.gov/?extraqs=%3fDataProvider%3dMicrosoft.Crm.Application.Plat - Internet Explorer provided by
Microsoft Dynamics CRM
SSA Frank
imagine
FILE
ADVANCED FIND
Query
Saved Views
Results
New
Save
Save As
Edit Columns
Edit Properties
Clear
Group AND
Group OR
Details
Download Fetch XML
Show
View
Query
Debug
Look for: Individuals
Use Saved View: [new]
Last Name
Begins With
Mca
Select


https://imagine.uatapps.dodd.ohio.gov/?dType=1&feature=advfind - Query Properties - Internet Explorer provided by McGladrey LLP
Save as new View
The view is stored in the list of saved views.
Name *
SSA Franklin individuals with Last Name starting with McA*
Description
Save
Cancel
115%


https://imagine.uatapps.dodd.ohio.gov/?pagetype=advancedfind#780401890 - Microsoft Dynamics CRM - Internet Explorer provided by
Microsoft Dynamics CRM
SSA Frank
imagine
LIST TOOLS
FILE
ADVANCED FIND
SAVED VIEWS
Record Type
Set As Default View
Activate
Deactivate
Delete Saved View
Assign Saved Views
Share
Copy a Link
Email a Link
Run Workflow
Start Dialog
Run Report
Export Saved Views
View
Records
Collaborate
Process
Data
Individuals Saved Views: Active Saved Views
Search for records
Name
Owner
Last Modified
SSA Franklin Individuals with Last Name starting with McA*
SSA Frank
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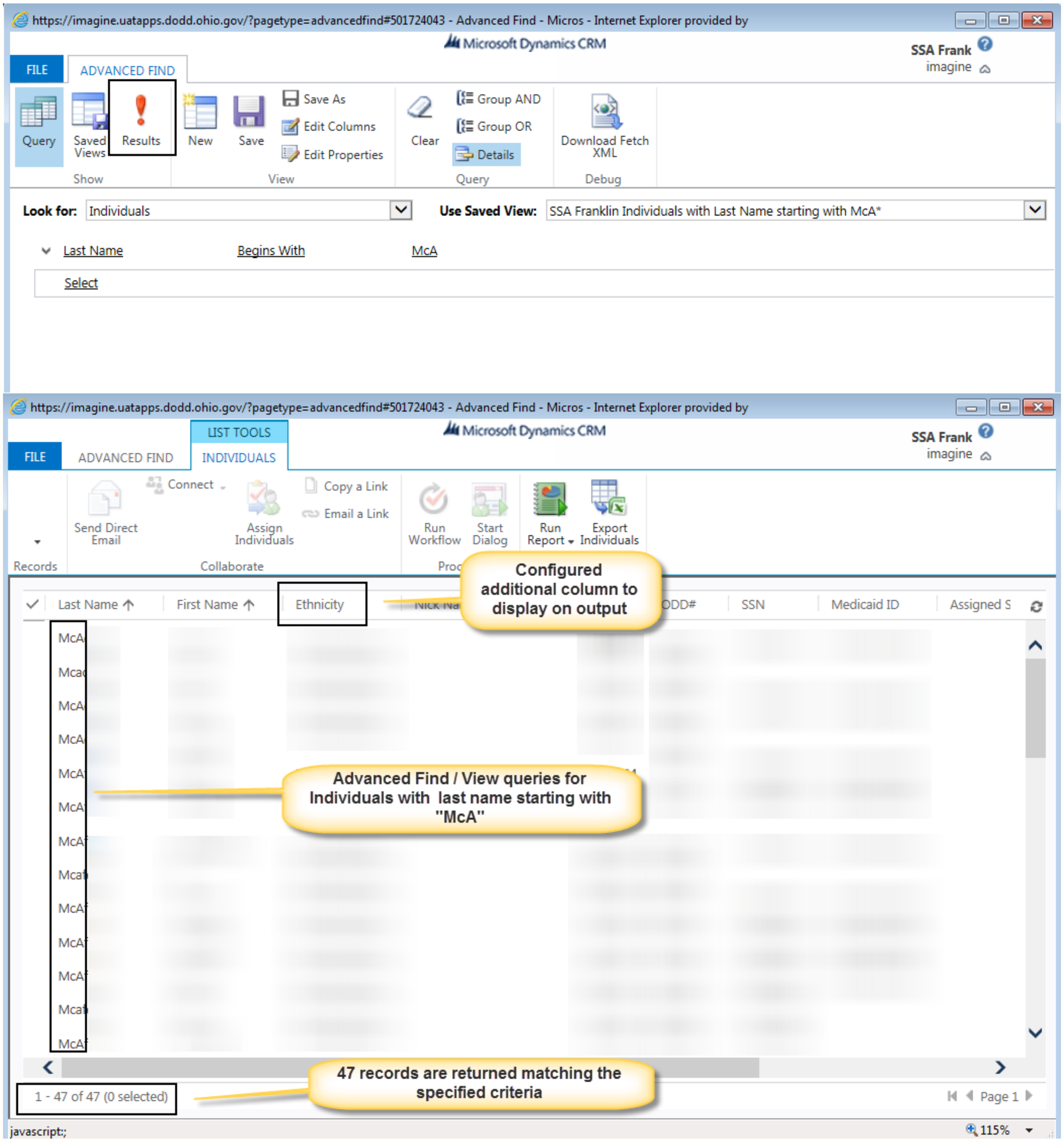
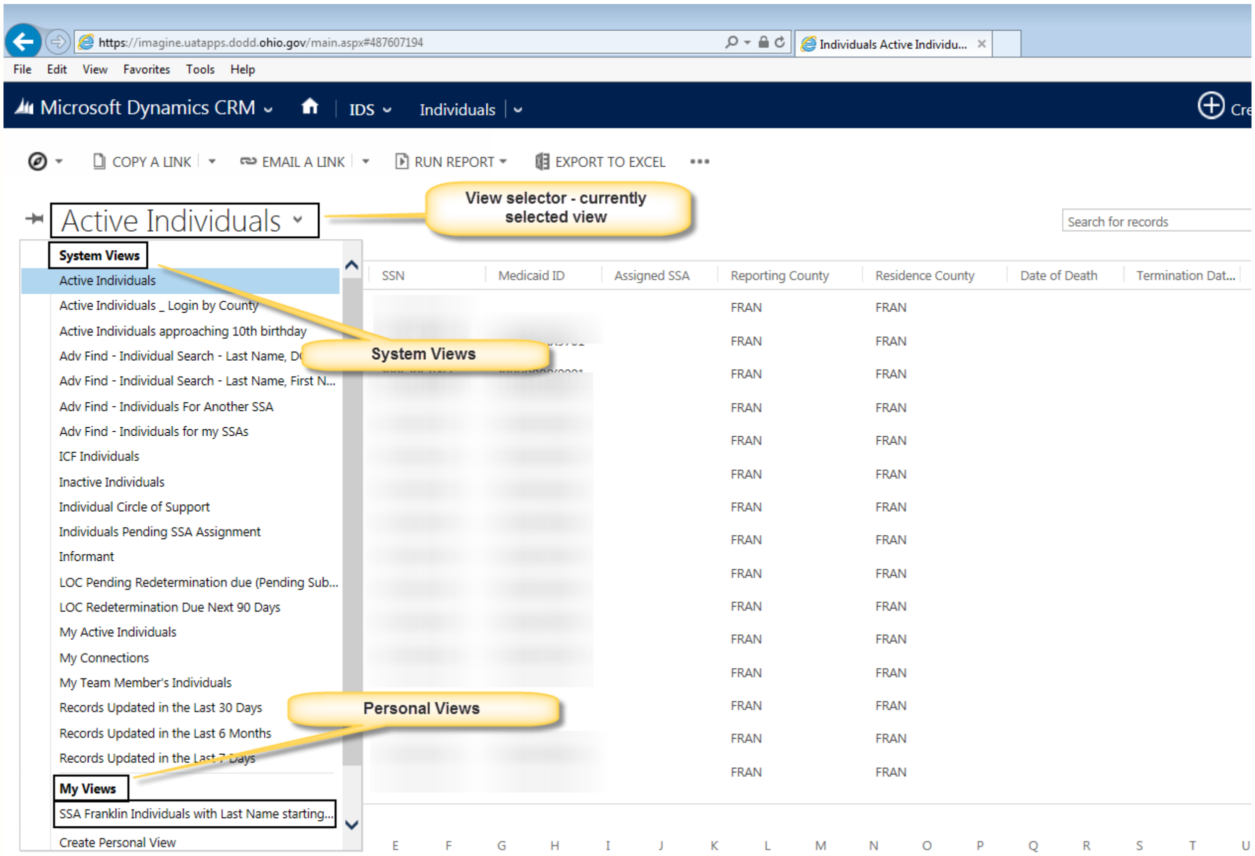


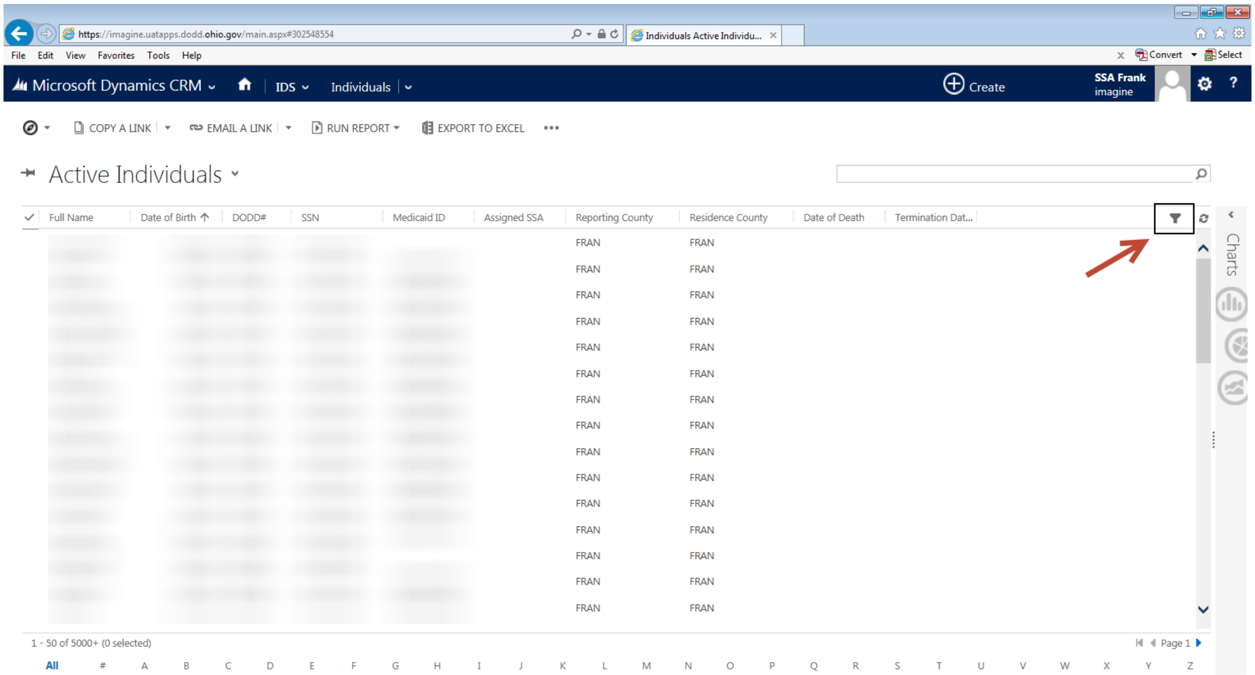
There are two types of views—system views and personal views. **System views** are either out-of-the-box or created by a system customizer. **Personal views** are most often created by you, but they may be created by other users and shared with you. Personal views come as the result of saving an Advanced Find.

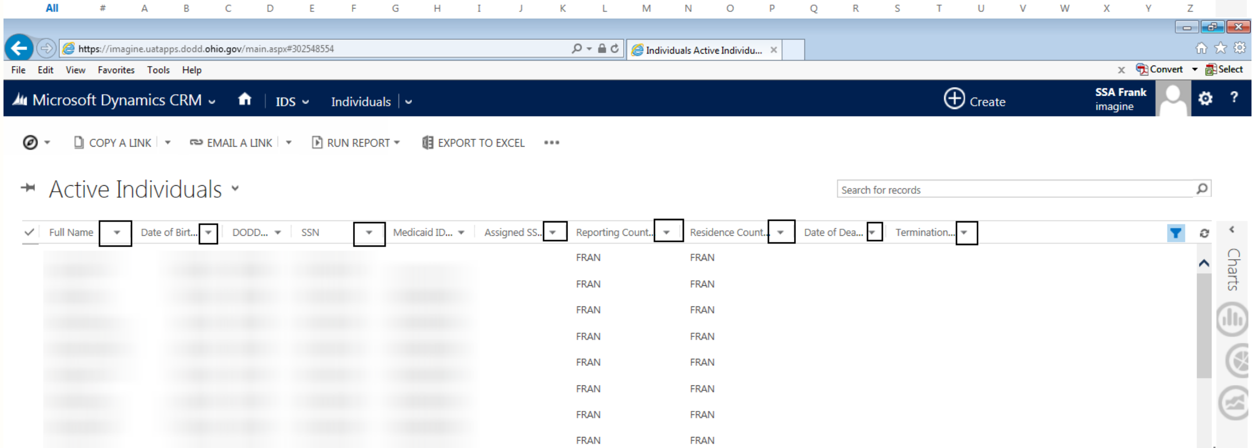


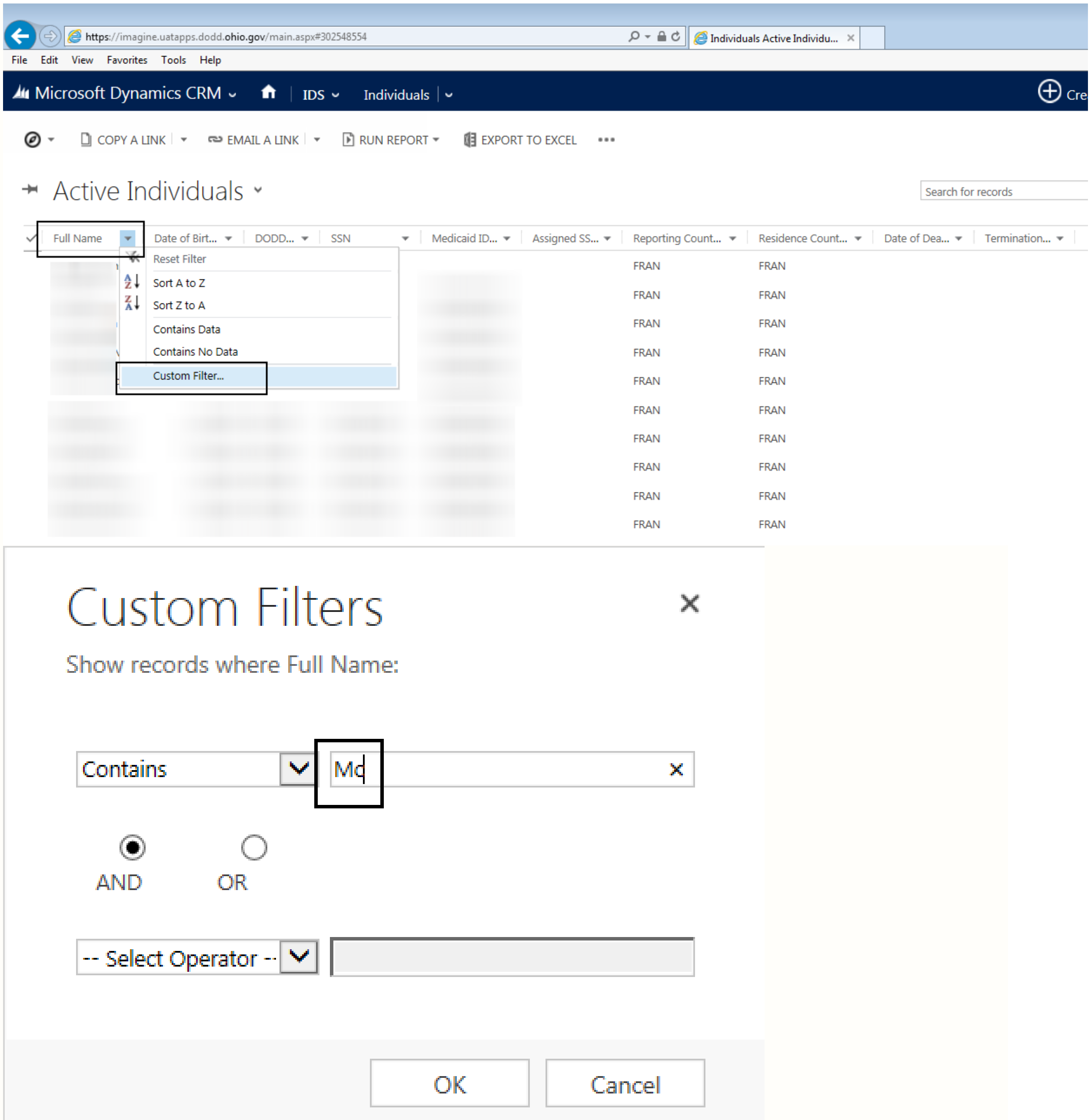
3. Filtering and Sorting Views

In order to filter a view, select the **Filter** icon which looks like a funnel, and is on the right hand side of the screen. The filter turns the CRM grid into a filterable grid similar to a table in Excel. An arrow appears next to each column header, and you can filter on any of the columns that appear in the view.

a) Ad Hoc Filtering



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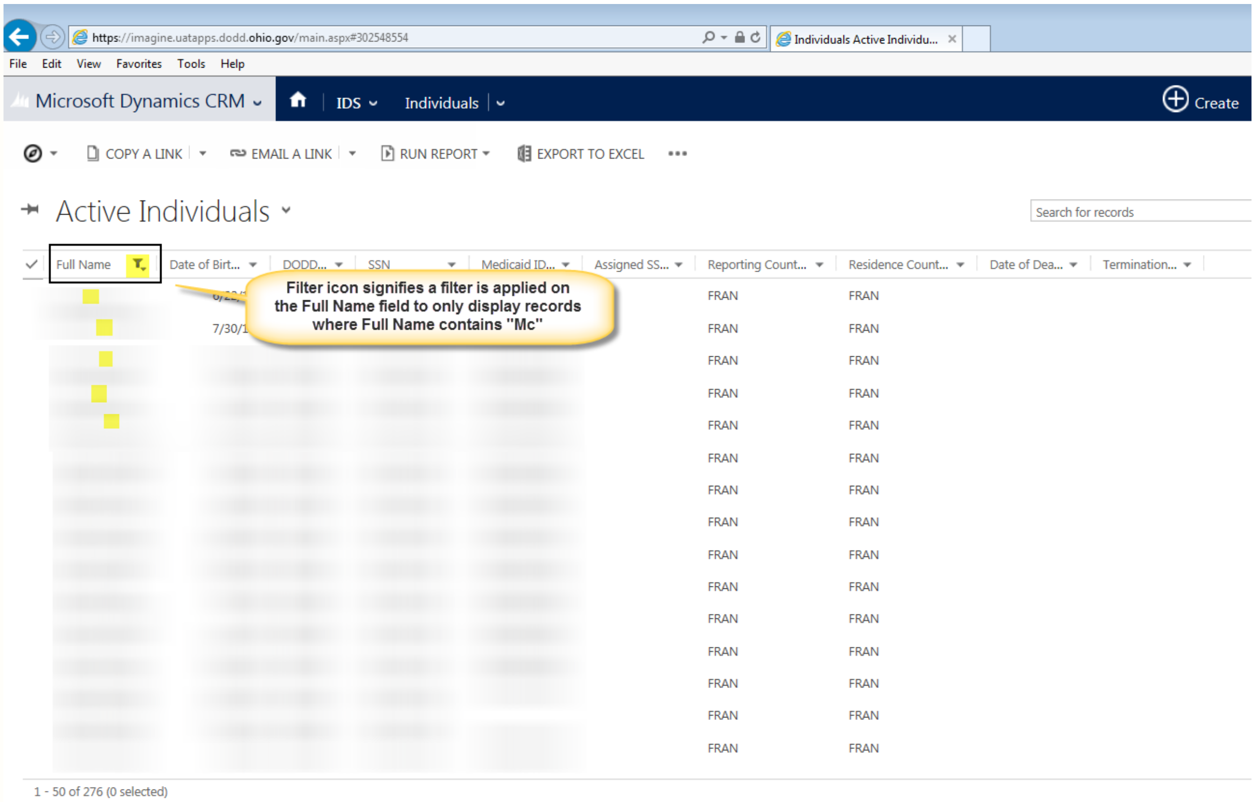
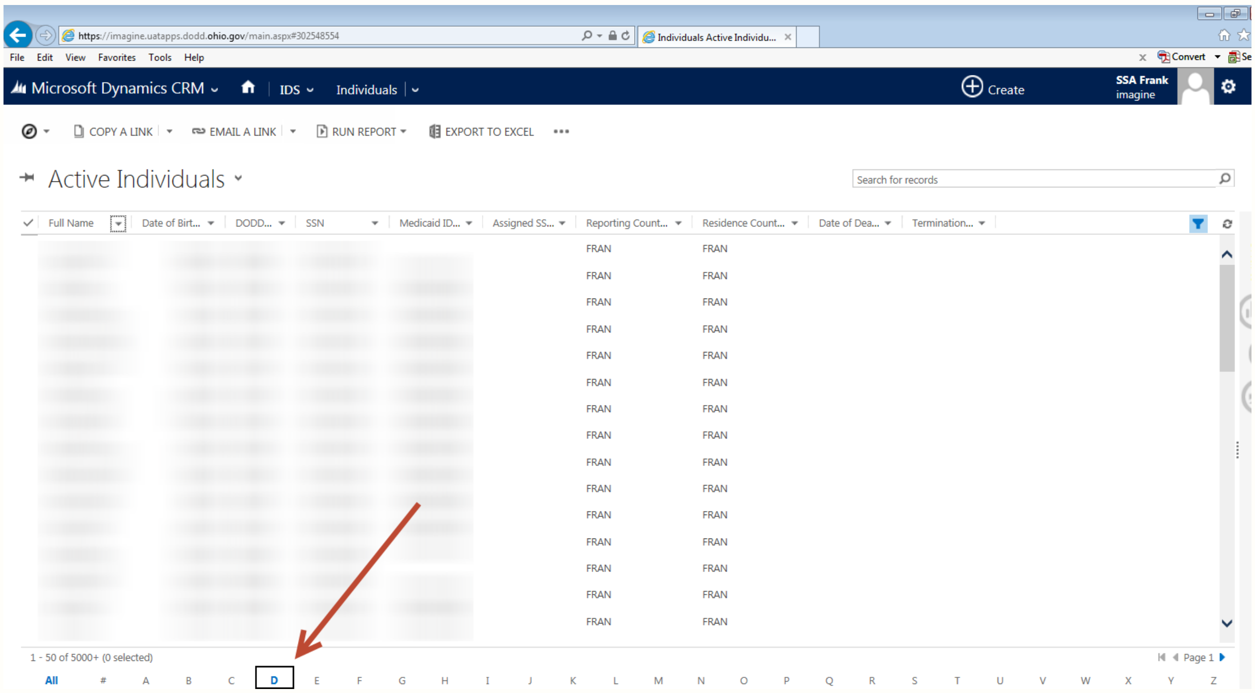
Cancel



b) Jump Bar

The jump bar is the group of letters that appear across the bottom of the screen. It allows you to jump to records that start with that letter. The jump bar interacts with the primary sort of the grid. So, if the grid is sorted by Full Name, choose D on the jump bar will take you to all Full Names that start with "D".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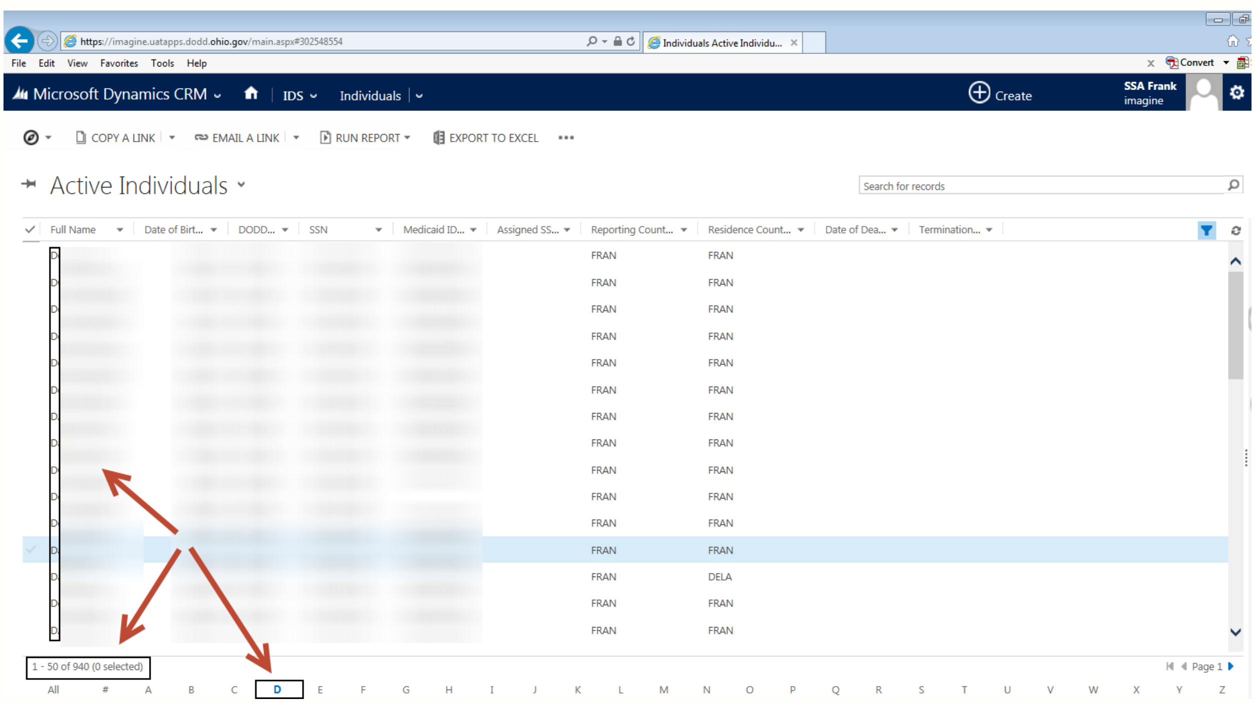
All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z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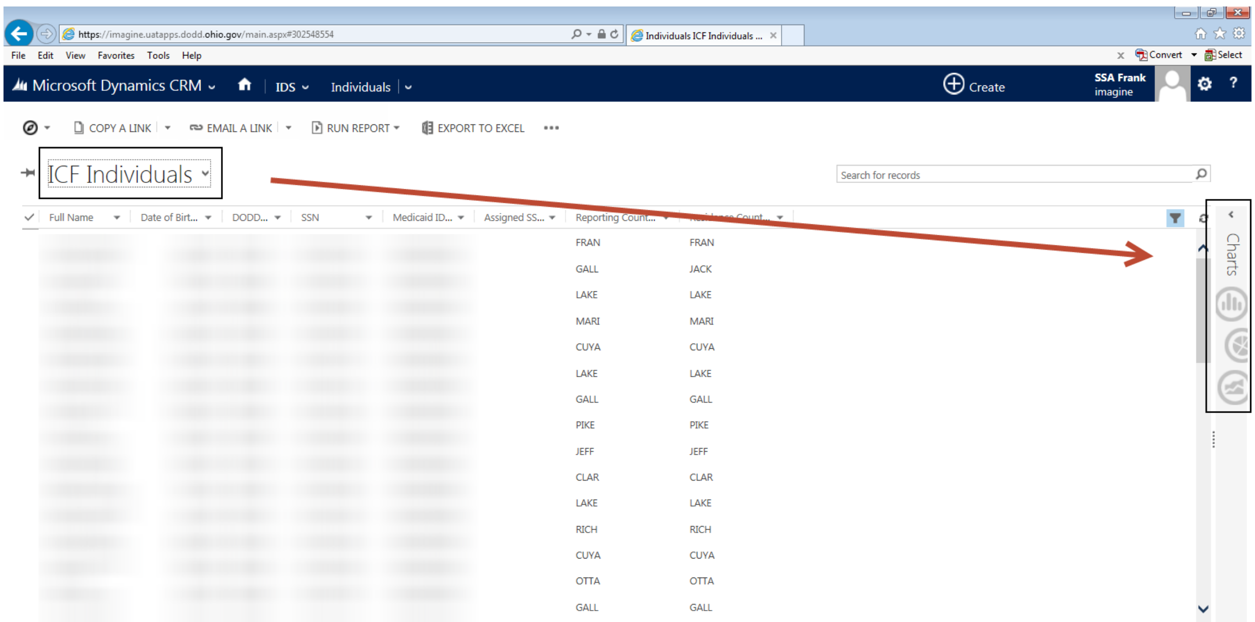
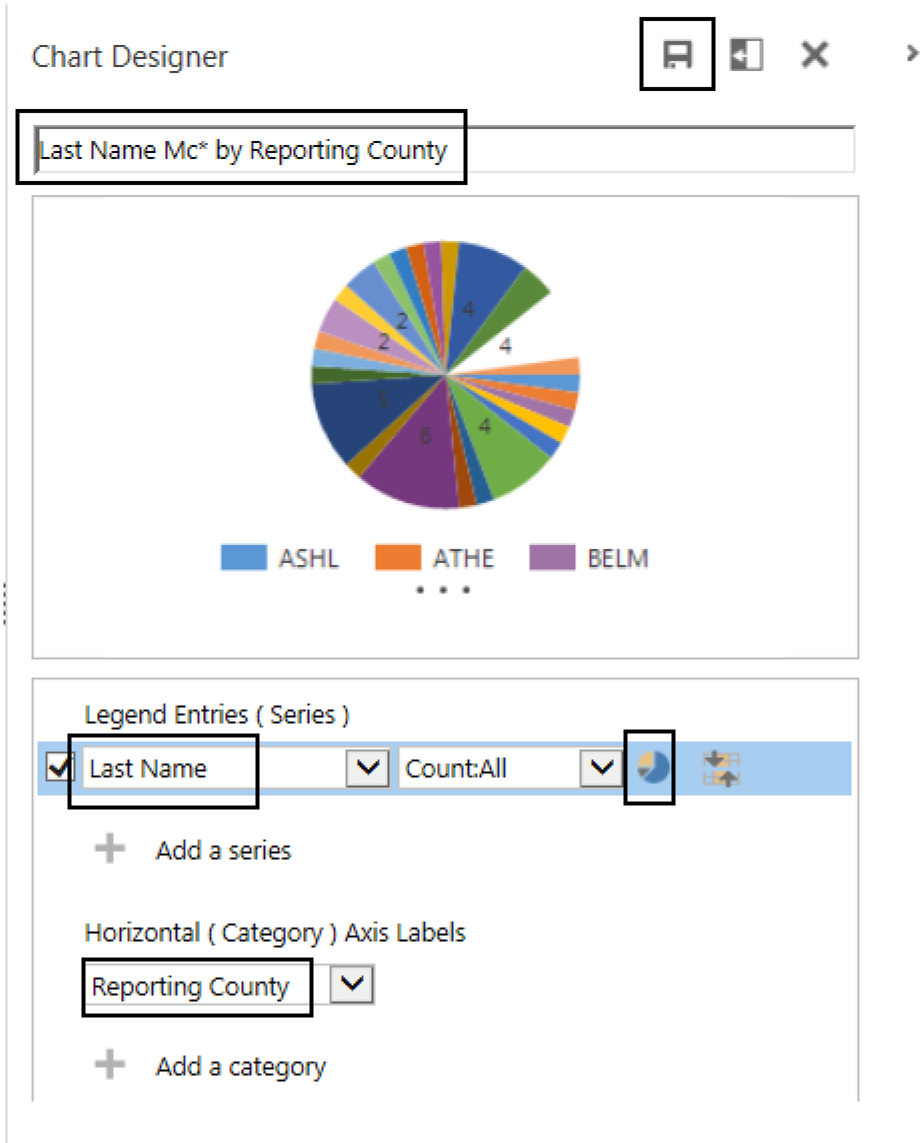
c) Inline Charts

Inline charts can be accessed from the grid view by selecting Charts on the far right. The neat thing about charts is that they interact with the views and filters currently applied to the grid. So, if viewing only ICF Individuals, the chart will show an analysis of ICF Individuals. However, you can also use the chart to filter records.





Input Chart Name, Series, Category, Chart Type and Save the Chart.

Quick Reference Guide to CRM

Glossary of Terms

Activities – displays several types of communication tasks that can be manually added or automatically generated through system rules.

Advanced Find – powerful query tool that allows users to create custom queries for all entities in the system for which the user has access. When saved the results of an Advanced Find are called a View. Advanced Find results can also be exported to Microsoft Excel for easy data processing outside of CRM.

Contacts – agents, policy owners, trustees, beneficiaries, prospect agents.

Custom entity – An entity that can be added to the system after installation to address a specific business needs of an organization.

Customer Relationship Management – Customer relationship management (CRM) is an approach to managing a company's interactions with current and future customers. It often involves using technology to organize, automate, and synchronize sales, marketing, customer service, and technical support.

Dashboards – designed to show important metrics for your sales organization. Each chart within a dashboard is interactive and the data shown is based on a user's role within the organization.

Ellipses – designed to show important metrics for your sales organization. Each chart within a dashboard is interactive and the data shown is based on a user's role within the organization.

Entity – A concrete or abstract thing represented by a noun, like contact, account, or lead. An entity manages data for an application.

IFRAME – A windowless inline floating frame, typically used for including web pages, such as a page from a SharePoint site, a section of HTML such as a button, or a custom application, in a form. IDS and WMS are both accessed from an IFRAME within CRM.

Individuals *(known as the **Account** entity in native CRM))* – allows you to track new and existing business from Agent contacts.

Introduction *(known as the **Lead** entity in native CRM)* – A potential individual who may receive services from DODD. Leads will be "promoted" to accounts (individuals) once they receive their DODD Number via the "Create Individual" process.

Personal View – Personal views are most often created by you, but they may be created by other users and shared with you. Personal views come as the result of saving an Advanced Find.

System View – System views are either out-of-the-box or created by a system customizer.

View – A concrete or abstract thing represented by a noun, like contact, account, or lead. An entity manages data for an application.