



RMEEx 2.0 RELEASE NOTES

SECURITY LOGGING & EMAILING LETTERS

SECURITY LOGGING

Security standards are always changing, and they always become more stringent. Most users of RMEx are required to comply with one or more of the following standards: ISO17799, ISO27001, PCI, and SAS 70. One security control that security auditors are now looking for is activity logging for key files within an application. If this issue has not yet appeared on your 'Security Controls Remediation List', it will soon!

Activity logging is the requirement to maintain a record of who changed what, and when, on a key data file within an application. Also required is the ability to enquire on the log file, to determine when a particular record was changed, or to review all the changes made by a particular person. Whenever a user makes a change to a key file, a record will be written to a log file. The log file will contain the user-id of the person making the change, the date and time, an indicator showing whether this record was created, changed or deleted and an image of the record before it was updated. There will be one log file for every major file in RMEx.

We have identified the following files as key files that require logging. Logging for the first two files is included in RMEx 2.0.

1. *Client*
2. *Smart code*
3. RMEx Security profiles
4. Letter formatting
5. Letter codes and overrides
6. Close codes
7. Agent profiles
8. Smart code series
9. Contact series
10. State controls and options
11. Changes in Client Access by User ID
12. Company Information/System Parameters
13. Payment Codes
14. Description Codes
15. Work Groups

Now, whenever a user makes a change to a key file, a record will be written to a log file containing an image of the record before it was updated. Depending on which file you are in, hitting the Enter Key and/or the F12 Key (Update) will create a record (entry). Now that Client and Smart code files have been set up for logging you will be able to:

1. Display a list of **all** users that have made changes to the files
2. View the changes for a **specific** Client or Smart Code

For the first key file – the Client file:

Directly below is a screen shot of the history log of changes made to a client file.

Client Master (History Log change)

Company 99

5=Display

Opt	User	Login date/Time	Action	Client
<input type="checkbox"/>	MICHELLE	2/04/11 16:20:200	Update	000004
<input type="checkbox"/>	MICHELLE	2/04/11 15:21:320	Update	000002
<input type="checkbox"/>	MICHELLE	2/04/11 15:11:000	Update	000002
<input type="checkbox"/>	PATL	2/04/11 13:21:440	Update	000004
<input type="checkbox"/>	KASUN	2/04/11 11:27:470	Update	000002
<input type="checkbox"/>	PATL	2/04/11 9:05:520	Update	000002
<input type="checkbox"/>	MICHELLE	2/03/11 17:24:460	Update	000002
<input type="checkbox"/>	JAMIE	2/03/11 10:43:300	Update	000002
<input type="checkbox"/>	JAMIE	2/03/11 10:43:200	Update	000002
<input type="checkbox"/>	JAMIE	2/03/11 10:42:580	Update	000002
<input type="checkbox"/>	JAMIE	2/03/11 10:42:460	Update	000002
<input type="checkbox"/>	JAMIE	2/03/11 10:41:000	Update	000009
<input type="checkbox"/>	JAMIE	2/03/11 10:40:350	Update	000009
<input type="checkbox"/>	JAMIE	2/03/11 10:40:310	Update	000009
<input type="checkbox"/>	KRISHAN	2/02/11 15:27:180	Update	000002

More...

F7-Exit

To view all user changes to the master file, bring up client update. On the main client screen, before entering a specific client, a log screen can be displayed. User changes to the client master file are shown above in the log. By default, entries are sorted by Login date/Time. Notice the client numbers on the right - they are different. The user changes made to a *specific* client can also be viewed. A specific client change is outlined below: Below is a view of the current information for client 4 *after* a change was made. Notice the contact name is Bob.

RME QUANTRAX CORPORATION INC.

ENTER
ATTN
PAGEUP
PAGEDN
EXIT
HELP
CALENDAR

Client Update

Company Name IOU OWE-IT COLLECT SERVICES, INC. RME
 Client Code 000004 Group Number 4
 Client Name CONSOLIDATED GAS COMPANY
 Description HEAT AND APPLIANCES
 Contact BOB Search Name CONSOLIDATED
 Address SUITE 500
 2500 BRANCH STREET
 City-State-Zip BETHESDA MD 20817 Last Placed 5/26/10
 Phone Number Salesman Code D1 Start Date 12/09/92
 Fax Number Reports to

Active Cases 61 Active Amount 1587294.93

	Month-to-Date	Year-to-Date	To-Date
New Cases	0	0	81
New Business Amount	.00	.00	110460714.88
Payments	.00	.00	110016124.20
Commissions	.00	.00	1136.75
Per-case Charges	0	0	
Client Receivables	.00	Client Payments	.00

F1-New F3-Search F5-Notes F10-Graphs F12-Update F15-SIF F21-Dup Delete 'D'

While on the first screen for client 4, after the change is made, bring up the log as shown below.

RME QUANTRAX CORPORATION INC.

ENTER
ATTN
PAGEUP
PAGEDN
EXIT
HELP
CALENDAR

Client Master (History Log change)

Company 99

5=Display

Opt	User	Login date/Time	Action	Client
<input type="checkbox"/>	MICHELLE	2/04/11 16:20:200	Update	000004
<input type="checkbox"/>	PATL	2/04/11 13:21:440	Update	000004
<input type="checkbox"/>	DEBBIE	11/01/10 14:24:510	Update	000004
<input type="checkbox"/>	DEBBIE	11/01/10 14:20:530	Update	000004
<input type="checkbox"/>	NELSON	7/27/10 14:30:130	Update	000004
<input type="checkbox"/>	DEBBIE	6/25/10 17:04:360	Update	000004
<input type="checkbox"/>	DEBBIE	5/03/10 18:25:220	Update	000004
<input type="checkbox"/>	DEBBIE	5/03/10 18:23:420	Update	000004
<input type="checkbox"/>	DEBBIE	5/03/10 18:21:190	Update	000004
<input type="checkbox"/>	DEBBIE	4/27/10 17:05:240	Update	000004
<input type="checkbox"/>	DEBBIE	4/16/10 11:36:140	Update	000004
<input type="checkbox"/>	DEBBIE	4/06/10 11:40:140	Update	000004
<input type="checkbox"/>	DEBBIE	4/06/10 11:17:300	Update	000004
<input type="checkbox"/>	DEBBIE	4/06/10 10:38:530	Update	000004
<input type="checkbox"/>	DEBBIE	4/06/10 10:05:460	Update	000004

More...

F7-Exit

Place a 5 in the option line for the user you need to view. The data that will appear will be the data that existed prior to that user making a change (for client 4 only – notice the client number on the right). Now place a 5 in front of the first entry and hit enter. The following screen is presented.

EMAILING LETTERS

We have added the ability to email letters to consumers.

- Once you have obtained a consumer's email address, Selected and Contact Series Letters can be emailed
- You will save on postage, save letter printing costs, save time and costs on setting up new letters, save on returned mail costs, and save time on delivery
- You can set up new 'letters' either as letters that will be mailed out as usual, or emails that will be sent to consumers electronically, or both
- Letter 'X1' can be set up to be mailed and a different letter format 'XE' can be set-up if that same letter is to be emailed. Same letter content – different format. (Company requirements may exist for new letters)
- If a consumer has an email address on file and you choose to send a 'letter' that is designated as an email, then the system will generate an email instead of a letter
- The consumer's email address is stored in the "Special Address" from the Tab Q window
- Agents can also send emails instead of letters. They have the option to enter an email address and specify whether the letter is to be sent by regular mail, email, or both. Notes are added to the account to provide an audit trail of what was done
- All emails are generated during the nightly process and go through the same normal edits that your current standard letters go through. The emails are then sent to your email server for transmission

Note: If ONLY an email is sent, it will be notated in the notes on the account. We are only tracking the original letter being sent. You can track emails that have been sent by applying a Smart Code or adding a Description Code from the Letter Code set-up screen.

Below is a screen shot of a standard letter.

Letter Codes

Company name	IOU OWE-IT COLLECT SERVICES, INC. RMEx			
Letter code	Z2	Description	P/A REMINDER LETTER	Email (Y) <input type="checkbox"/>
				Email code <input type="checkbox"/> *S
Allow in contact series (Y,A)	<input checked="" type="checkbox"/>	Allow as selected letter (Y,A)		<input type="checkbox"/> A
Allow selected letter on account with a close code (Y)				<input type="checkbox"/>
Do not allow selection WITHIN	<input type="checkbox"/>	days of placement date		
Do not allow selection AFTER	<input type="checkbox"/>	days of placement date		
Allow only ONCE per account-Y,S	<input type="checkbox"/>	Allow on legal account only (Y)		<input type="checkbox"/>
Page length (Max.of 112 lines)	<input type="text" value="66"/>	Number of pages		<input type="text" value="1"/>
Number of copies	<input type="text" value="1"/>	Form type code		<input type="text" value="STD"/>
Print link balances (Y,1-9)	<input checked="" type="checkbox"/>	Print post-dated check info. (Y)		<input type="checkbox"/>
Print additional info. (F16) (Y)	<input type="checkbox"/>	Print pay.arrangement info. (Y,P)		<input type="checkbox"/>
Print legal info. (Y,L)	<input type="checkbox"/>	Print medical info. (Y)		<input type="checkbox"/>
Print legal tracking info (Y,P)	<input type="checkbox"/>	Send additional letters	<input type="checkbox"/>	<input type="checkbox"/>
Special printing selection (YZS)	<input type="checkbox"/>	Print in upper case (Y)		<input type="checkbox"/>
Add description code	<input type="checkbox"/>	Send with bad address (Y)		<input type="checkbox"/>
Letters sent MTD:	1462	YTD:	1594	Delete 'D' <input type="checkbox"/>

F1-New Selection **F3-Search** **F7-Exit** ENTER-More Information

To send the original letter and email the same letter, enter a Y in the 'Email' field. An *S will also need to be entered in to the field 'Email code'.

The display below shows another standard letter with a different emailing option.

Letter Codes

Company name	IOU OWE-IT COLLECT SERVICES, INC. RMEx		
Letter code	Z1	Description	SETTLEMENTS
		Email (Y)	<input type="checkbox"/>
		Email code	Z4
Allow in contact series (Y,A)	<input type="checkbox"/> A	Allow as selected letter (Y,A)	<input type="checkbox"/> A
Allow selected letter on account with a close code (Y)			<input type="checkbox"/>
Do not allow selection WITHIN	<input type="checkbox"/>	days of placement date	
Do not allow selection AFTER	<input type="checkbox"/>	days of placement date	
Allow only ONCE per account-Y,S	<input type="checkbox"/>	Allow on legal account only (Y)	<input type="checkbox"/>
Page length (Max.of 112 lines)	66	Number of pages	1
Number of copies	1	Form type code	STD
Print link balances (Y,1-9)	<input type="checkbox"/>	Print post-dated check info. (Y)	<input type="checkbox"/>
Print additional info. (F16) (Y)	<input type="checkbox"/>	Print pay.arrangement info. (Y,P)	<input type="checkbox"/> Y
Print legal info. (Y,L)	<input type="checkbox"/>	Print medical info. (Y)	<input type="checkbox"/>
Print legal tracking info (Y,P)	<input type="checkbox"/>	Send additional letters	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Special printing selection (YZS)	<input type="checkbox"/>	Print in upper case (Y)	<input type="checkbox"/>
Add description code	<input type="checkbox"/>	Send with bad address (Y)	<input type="checkbox"/> Y
Letters sent	MTD: 3	YTD: 68	Delete 'D' <input type="checkbox"/>

F1-New Selection
F3-Search
F7-Exit
ENTER-More Information

If a different letter should be emailed when the standard letter Z1 is selected, leave 'Email' blank and enter the letter code to be emailed in the 'Email code' field. This set-up also gives you the opportunity to keep the same format for the letter or create something different. Note: If a new format is chosen, please take into consideration company requirements for new letters.

To complete the set-up for this action the Z4 letter needs set up. Below is a screen shot for the Z4 letter.

Letter Codes

Company name IOU OWE-IT COLLECT SERVICES, INC. RME_x

Letter code Z4 Description LTR 2 - MULT CLIENTS Email (Y) Y

Email code

Allow in contact series (Y,A) Y Allow as selected letter (Y,A) Y

Allow selected letter on account with a close code (Y)

Do not allow selection WITHIN days of placement date

Do not allow selection AFTER days of placement date

Allow only ONCE per account-Y,S Allow on legal account only (Y)

Page length (Max.of 112 lines) Number of pages

Number of copies Form type code

Print link balances (Y,1-9) Print post-dated check info. (Y)

Print additional info. (F16) (Y) Print pay.arrangement info. (Y,P)

Print legal info. (Y,L) Print medical info. (Y)

Print legal tracking info (Y,P) Send additional letters

Special printing selection (YZS) Print in upper case (Y)

Add description code Send with bad address (Y)

Letters sent MTD: 9 YTD: 9 Delete 'D'

F1-New Selection F3-Search F7-Exit ENTER-More Information

Notice the 'Email' field has a 'Y' entered but the 'Email code' is blank.

The agent can expect to see a new option:

Following is a screen shot of the main detail screen and a smart code window has been presented.

Company # 99 Case # 072430781 <input type="button" value="Get Primary"/>	Home Phone																																																		
Client Number 000002 ST MARYS HOSPITAL1234567890123456789012	Work Phone	301-875-9633																																																	
Owner GUI Worker GUI Split	Cell Phone																																																		
Client Acct #	Follow Up Date	12/16/10																																																	
	Promise Amount	.00																																																	
INQUIRY 000 P																																																			
Guarantor 0 DANCER TINY	Amount Placed	100.00																																																	
Extra Address EXTRA R	Balance	80.00																																																	
Street Address 123 MAIN ST	Total Balance	2048.16																																																	
City/State/Zip LINDA LU GA 30041	No. Of Accts	2																																																	
Place of Employment	No. Paid in Full	0																																																	
Social Security No	Date Placed	9/18/08																																																	
Patient (L/F) DANCER TINY	Last Transaction	3/05/08																																																	
X-Reference (L/F)	Last Worked	12/08/10																																																	
Spouse (Last/First)	Last Letter	12/08/10																																																	
ACat CC Status RM Once	Last Payment	20.00																																																	
Letters Pending Cred.Rept	L. Pay Date	2/05/10																																																	
	PD Check \$	50.00																																																	
	From	2																																																	
	PD Check Date	12/15/10																																																	
Close Code																																																			
Closed Date																																																			
	LGL-F	Smart Code 151																																																	
	P/ARR	SMART CODE																																																	
	COS	Smart Code 151 ACat CC																																																	
	OTH+	QCcat TFrame (A,M,P) P																																																	
	LK.AD	Promise Amount .00																																																	
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		Letter Z2 Email Code *S																																																	
		PATL@QUANTRAX.COM																																																	
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		Press ENTER to Continue																																																	
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The agent has entered a Smart Code and then entered the letter code Z2. If the letter code allows for the letter to be emailed, an email field is then presented. A message will also be shown, "email options available". The email field may include the consumer's email address already on file. This email address is stored at the account level in the Tab Q, option 6. If a new email address is required, the agent can type over the existing address in the smart code window, replacing the stored address and sending the letter to the new email address.

When an email address has not already been secured, the agent will be presented with a message, "emailing is not set up". The agent can then enter the email address and the Tab Q field will automatically be updated for future use.

Note: The user must request the original letter. A user cannot request the letter that is set-up for emailing only. (Similar to Letter Translation)

Another option will need a response by the agent, 'Send letter by email'.

- Y – email only
- B – email letter and mail letter
- N – do not email the letter

- ⌘ Emailing letters will require additional software, *'Emailing letters RMEEx 2.0 for server'*, to be loaded on a separate server.