

RME_x – The Plan

Implementation Instruction Suite – “The Plan” (Preparing for an RME_x Conversion)

This document focuses on the information needed for the conversion, and is designed to give you a big picture overview of what to expect during the conversion and implementation process. The information contained in this document is required reading for a smooth conversion, and will work in conjunction with our conversion forms. These forms are documents you will fill out and present to Quantrax as you update the conversion information. These forms are specific to certain areas of the conversion and implementation and work will be done in each of them simultaneously.

These forms can be downloaded by clicking here:

[Account Information](#)
[Client Information](#)
[Payment Information](#)

[Hosting Clients – The Roadmap to Hosting:](#) Download and review this document ASAP. This will give us the required information needed for accessing RME_x in the hosting environment.

There will be times we will need to upload and download files. For this we use FTP (File Transfer Protocol).

Address: [ftp.quantrax.com](ftp://ftp.quantrax.com)

Login name:

Password:

The content of these forms are for those individuals who will be responsible for the management and implementation of RME_x. This will require input from individuals regarding current processes such as payment handling, automated new business loads, account work flow and iSeries operational staff. We must all play an integral role in the conversion process to ensure the transition is successful. Reviewing and following this documentation is what will insure a successful conversion to RME_x!

Each conversion is a team effort - Each team must take an active role in successfully completing the conversion.

RME_x Training

Web Based Training

Quantrax's web based training suite consists of both audio and video recording modules as well as interactive management training with Quantrax staff.

Key management personnel, all collectors, and all payment processing staff will need to review the appropriate audio/video training modules to become familiar with the features of RME_x. These can be found at our website at <http://Quantrax.com/> in the "For our client" section under Web Based Training.

Key management personnel are required to attend the interactive training with Quantrax staff for Management Training. This training may be web based or on site. **At least two people will be required to attend.**

Team work will be very important in creating your collection strategies. It is strongly suggested that you do not put the entire system setup on one person's shoulders.

On Site Training

In some cases Quantrax will be on site when you go live for additional training and support. Again, It is advantageous that prior to this, you identify the people who will be playing the key management roles in the implementation of RME_x as well as the setup and maintenance of the system.

Train the Trainer

In the case of larger clients, you will want to make sure that your collection supervisors are trained so that they can train the collectors.

Quantrax will assist with questions and training that relate to the use of the system.

RME_x and converting your data to RME_x

Conversion

The conversion process takes your data and puts it into RME_x.
The information below is an overview of the conversion and modification process.

Install RME_x

Quantrax will be placing your software on our FTP site. We will notify you once we are ready for you to download RME_x to your iSeries.
Once it has been downloaded, we will need access to your iSeries in order to install the software.

Provide conversion related test data

Once RME_x has been installed, we will need test data.

We will be converting all of your major files and will need test data from each of those files.

The information we will be converting and need test data for is:

Account Information

Client Information

Payment Information

We will require a minimum of 200-400 records in each file. Each of these records **MUST** contain corresponding data within each file.

Conversion Data Mapping

Data mapping is process of identifying data from your system and inputting it into RME_x. A Quantrax Data Analyst will be discussing this with you in more detail.

Write the conversion

Once the mapping has been completed, the specs will be given to the Quantrax programming team.

Run Test Conversion(s)

After the conversion programs have been written and tested by Quantrax. If the data does not appear to have properly converted into RME_x, any changes needed will be analyzed and implemented, and additional tests will be run until you have “signed off” on the conversion data.

Test conversions are typically run during a weekend and handled by Quantrax. They may require many hours to complete depending on the number of records that need to be processed and the size and speed of your AS/400. However, this does not rule out running a test conversion during the day or evening.

Review Converted Data

You will be responsible for comparing the data on RME_x with the data on the prior system thoroughly. You are also responsible for ensuring that the additional conversion rules were followed as per your specifications.

After each test conversion, you will want to recheck all of your data to confirm it is still accurate.

After a test conversion, a thorough review of all converted data by your staff is required, giving special attention to the accounts, client information, statistical information, close codes and collector codes as applicable.

The Nightly Procedure should be run, accounts should be reviewed and reports printed where applicable. In short, the information should be reviewed as though it were being used in a live environment.

This is also a good time let the collectors and operations personnel review several accounts that they are familiar with. By obtaining input, will help you to identify any areas which operate in a manner you feel is different from the way you currently do business.

If you find data that is incorrect, we will need to know where that information is located in your old system files, and what the correct data should be in that field.

This area is crucial to the success of your conversion.

Live Conversion

The final conversion of data from your current system to RME_x should be performed after you have completed your month end processes. To minimize your loss of productivity, we will coordinate the exact date with you and the live conversions will be managed by Quantrax. It is not necessary to have a Quantrax representative onsite while the final conversion is running. However, we may have a representative onsite when you go live with RME_x.

If required, documentation covering the data conversion procedures will be provided in advance.

Once again, careful review of all converted data should have been done during the testing phases. The objective is to have the system ready for production by the next working day.

Signing off on converted data

At this point you have reviewed your converted data and should be comfortable that the data was converted properly. As with all conversions, you may discover some minor issues and we should be able to address them even though the conversion is complete.

Modifications

You may discover during the training and data mapping process that some of your existing custom programs may no longer be required. However, you may have some interfaces between you and your client or a vendor that will need to be addressed.

Provide modification related test data

We will require a test file for each modification needed.

Modification Data Mapping

You will need to provide Quantrax with a detailed description of the project as well as clear specifications required to write the interfaces.

Write the modification

Once the mapping has been completed, the specs will be given to the Quantrax programming team.

Test Modifications

After the modification programs have been written and tested by Quantrax. Any changes needed will be analyzed and implemented, and additional tests will be run until you have “signed off” on the modification.

Contacting Quantrax and Quantrax Support Tools

Information about contacting Quantrax regarding support procedures for situations needing immediate attention:

- Go to <http://www.quantrax.com/>
- Click **Client Login** (on top right side of page)
- Enter your:
 User ID: rmex2012
 Password: thebest
- Click contacting us (on left side of page)

Solving Problems Using the Web Based Training at Quantrax.com

To provide quick and accurate answers to questions you may have about the system, Quantrax has made a significant investment in the area of Web Based documentation.

There are different levels of documentation for RME_x, such as release information, video training, a knowledgebase, etc.

Prior to contacting Quantrax, we ask that you search for your answer using the following tools:

Field-level Help Text:	Place cursor on field in question, then press Help button
Knowledgebase:	Quantrax.com > Client Login > Support and Knowledge Base
Web Based Training:	Quantrax.com > Client Login > Web-based training

If you do not obtain the answer to your problem within a reasonable period of time, the web site has a section called **Contacting us** on the **For Our Client** page for further instructions. Depending on the type of problem, Quantrax will utilize different techniques to assist you. These include, email and/or telephone support, along with accessing your system through the VPN.

Support Information for RME_x

Having quick access to high-quality technical and operational support is a very important part of making RME_x successful for you. Quantrax treats every client contact as an opportunity to provide additional training to its users as well as enhancing our products and the on-line documentation. As opposed to providing the simplest solution to your problem, you will often find our technical staff asking you questions such as:

- “What are you trying to accomplish?”
- “Why do you want to do that?”
- “Have you thought about this?”

By obtaining a good understanding of your requirements, we will be able to provide you with a solution much more efficiently.

As you work with RME_x, you will learn that very often there are many different ways to solve the same problem. As an example, consider the question "How do I close an account?" There are probably 30 *different* answers to this question if you considered security, linking, the different types of close codes, whether the system should automatically close the account based on certain conditions, credit reporting, Smart Codes, Smart Code overrides, statistics etc. Each solution will have advantages and disadvantages. In most cases, it will be advantageous to be patient and consider some of the different alternatives.

With traditional data-based systems, there are few alternatives within the software. The collector or management is forced to consider all the alternatives and make the best decisions each time. However, with an intelligent system that can be trained to automate a great number of alternatives, just as a human expert would give you a great number of choices. Understanding an intelligent system takes time and patience, but you will be rewarded with knowledge that could someday be utilized to a great advantage. To help Quantrax with providing the best advice, we recommend the following approach when you have to call about solving a particular problem:

Carefully think about what you want to do and why you want to do it

When you call us, give us this information. Try not to give us the solution at this time, because the support staff at Quantrax must understand the problem before it can be solved

Assist Quantrax by answering any questions they may ask. It is possible that you may not understand a particular line or questioning but please try to be patient. The manner in which a Support/Technical person looks at a problem will often be very different from the way a user would perceive that same problem

When a solution is presented, think about it and see if it addresses all your requirements. It is also possible that the recommended solution identifies new problems that had not been considered in the initial analysis. Take time to evaluate and re-evaluate the problem and the solutions presented before making a final decision about what you want to do