RMEx-Documenting Project Requests and Contacting Support:
What You Need to Know

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Project Requests - Information Needed

- ❑ Project Requests Should be E-Mailed to Projects@Quantrax.com
- ❑ Menu Option Where You Want the Program Located
- ❑ What Should the User Need to Input on the Screen
  - ❑ Client Codes
  - ❑ Date Ranges
  - ❑ Close Codes
- ❑ Type of Interface – Report, Inbound File, Outbound File or a Combination There of
- ❑ Report Details
  - ❑ Headings Needed
  - ❑ Data Columns Needed
  - ❑ Calculations Needed
  - ❑ If Modification to an Existing Base Report – Use that Report as an Example
- ❑ File Details
  - ❑ File Name
  - ❑ File Location
  - ❑ File Construction (multi-record, comma delimited, flat file, etc.)
- ❑ Format of Data Within the File
  - ❑ Date Formatting (MMDDYY, MDCY, etc. and type of separator used)
  - ❑ Money Formatting (right/left justified, are commas included, is decimal included, is $ sign included, is the field zero filled, etc.)
  - ❑ Name Formatting (last, first – first ^last, etc.)
- ❑ Batch or Interactive Processing
- ❑ Name and I-Series Location of Test File

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❑ Think Out of the Box for the Future of the Program
  ❑ Do I Need This to Run in the Nightly and if so What About Weekend Processing
  ❑ Do I Also Need a Menu Option in Case the Nightly Fails
  ❑ If Files are Created Using a Date, How Will Old Files Get Deleted
  ❑ Should I Use Client Numbers for Selection or Client Group Numbers
  ❑ Should I Have the Client Number, Description Code, etc. Hardcoded or Have the User Enter the Selection Criteria (Less Hardcoding = Less Future Program Changes)

❑ Common Issues With Project Requests
  ❑ If File Name Should Contain the Date – Tell Us ABCmmddyy not ABC080812
  ❑ Use RMEx Terminology – Not Your Company Lingo
  ❑ Use the RMEx Field Names to Clarify the Project (post payment as 01-P means less to a programmer than post the payment with an 01-Payment Transaction Code and P-Balance Type)
  ❑ Do Not Use an Old E-mail Chain to Request a New Project or to Change an Existing Project
  ❑ If the Project is Not Listed on Your Project Report – Contact Quantrax

❑ Contacting Support is Severity Level Driven
- ❑ Level 3 – Productivity Not Impacted and Application Support
- ❑ Level 2 – Productivity Moderately Impacted and Custom Code Error Messages
- ❑ Level 1 – Productivity Severely Impacted and Base Code Error Messages

❑ If Level 3 – Productivity Not Impacted and Application Support
- ❑ Check the Knowledgebase
- ❑ Contact Via Website-Fusion
- ❑ Contact Via E-Mail

❑ If Level 2 – Productivity Moderately Impacted and Custom Code Error Messages
- ❑ Check the Knowledgebase
- ❑ Contact Via Website-Fusion
- ❑ Contact Via E-Mail

❑ If Level 1 – Productivity Severely Impacted and Base Code Error Messages
- ❑ Contact Via Phone or Pager Immediately

Contacting Support

❑ Submit Your Support Request Through Fusion
  ❑ Log into the Quantrax Website
  ❑ Go to For Our Clients → Knowledgebase → Submit a Ticket
❑ Send an E-mail to Support@Quantrax.com
❑ Call Support @ 301-657-2084
❑ After Hours (8:30am-5:30pm EST) Page us @ 1-800-SKY-PAGE pin# 3148960

❑ Information Required For Support Requests

  ❑ Communicate the Issue in Detail
  ❑ What Company/Client#/Case#/User/etc. is Effected
  ❑ When Did the Issue Begin
  ❑ What Menu Options are Involved
  ❑ What Steps Did User Take Prior to the Issue Occurring
  ❑ What Outcome Were You Expecting verses the Actual Outcome
  ❑ Send Examples
  ❑ Send Screen Shots
  ❑ Answer All Questions Issued by Support Staff

❑ Common Issues With Support Requests

    ❑ No Call back Number on Support Request

    ❑ Multiple People are CC'ed on Request/Involving Multiple Support Staff in the Same Issue

    ❑ Not Enough Information is Given

    ❑ Company Lingo is Used Instead of RMEx Terminology

    ❑ E-mailing Individual Staff Members at Quantrax Instead of Support

    ❑ Calling Individual Staff Instead of the Support Line

    ❑ User Not Checking the Knowledgebase