TeleAgric Dashboard

> **A dedicated program has been developed to manage Kuapa Kokoo data-flows for it's TeleAgric Call Centre. This program is called the TeleAgric Dashboard.**
> **The details of how program should be used are detailed below.**

What is the TeleAgric Dashboard for?

The call-centre team at KKFU use the TeleAgric Dashboard to manage work-flows when they are calling farmers and interacting with them. If a farmer has a serious issue, such as diseases to their crops, the TeleAgric Dashboard can be used make a note of this issue and to trigger communications to field staff for them to visit this farmer, and the "Calls" records added to the database can be used to mange and track the issue to ensure it is resolved.

The TeleAgric centre does more than just show and manage data about phone-calls made to farmers. It also gives TeleAgric staff access to KKFU farmer records. By updating these the call-centre team will verify and update farmer data stored by KKFU. Data such as farmer phone numbers, KKIDNumber, Ghana Card Number, Society Membership details etc. can all be cross-checked, entered and reviewed.

KKFU management may also want TeleAgric staff to phone specific farmers, or zone purchasing clerks directly to communicate about issues such as Society Elections. When this is done, the work can be recorded in the database as a log to show what has been done.

The call-centre team can also undertake useful data-cleaning of the database as part of their day-to-day work. The KKFU database has some issues, such as duplicate farmer records. When TeleAgric Centre staff find duplicate records for one farmer, they can undertake "merge" operations.

The Main Screen of the TeleAgric Dashboard
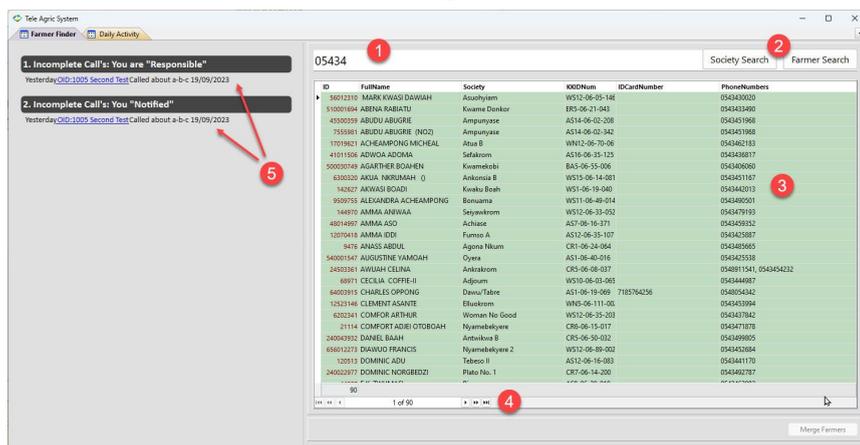
Main Search Screen of TeleAgric Dashboard

Areas of the main screen, as highlighted by the numbers above:

1. The **Search Field**: When finding Society or Farmer records, first enter a search term in the search field. In this case part of a **phone number** has been entered. When the search is run all records with farmers matching this phone number are returned.

2. The **Society Search** and **Farmer Search** buttons. Click on either of these to search for records in the database which match the text in the Search Field.

3. The **Results Grid** this shows either farmers or societies. Click on any row and an Edit Form for the selected farmer or society will open allowing the user to edit data.

4. Grid scroll-bar: allows easier navigation of the Results Grid and shows the number of records returned.

5. The **Calls Dataviewer** this area of the main screen returns a view of any Calls that the user has not completed dealing with. The use of this dataviewer is described in more detail later in this document.

Intelligent Search in the TeleAgric Dashboard

The TeleAgric Dashboard has been programmed to try to make location of farmers fast, easy and intuative. The KKFU database includes hundreds of thousands of farmer records, so to return data quickly special programming has been done behind the scenes. The user can enter part of the farmer's **phone number**, **first name and last name, Ghana Card Number** or **KKID-Number** and the Dashboard will return only those records which match the search term.

Farmer Name Search

If the user types **part** of the first and last name of the farmer, separated by a space, matches will be returned.

Note that this can be very useful as the exact spelling of farmer-names in the database is not very precise. Users can enter the parts of the names that they are confident about.

Provided that at least 4 characters are entered, the number of records returned is usually managable.

Users should take care when using very common sequences of letters such as "Kwa" or "Ama" as these may return many thousands of records. Try to add some extra letters to narrow your search.

Farmer Search by KK-ID Number

If the user types **part** of the KKID-Number, matching farmers will be returned.

Again, users should attempt to enter enough letters and numbers to narrow the search, as short sequences will return very large numbers of farmers.

The Intelligent Search also searches for part of **phone number** or **Ghana Card Number,** enter parts of any of these and the search will find them.

Filtering the results

Once records are returned, remember that you can filter the Results Grid by clicking on the header-column and selecting values, as shown in the image.

They can also **right click** on the grid to access a useful menu of detailed commands.

More details about using the Orixa Data Grid can be found here:

[View Grids for viewing, sorting and finding data](#)

Search by Society Name

The Intelligent Search will also search for **Societies/Zones.** In this case, enter part of either the zone's name or StationMark.

Note that when Societies are searched, the Results Grid color changes to Blue, indicating different data is present.

Double-click on any row to open the **Edit Form** for the selected Zone.

Finding and opening a farmer's record involves the following steps:

1. Enter a search-term.

2. Click the farmer-search button.

3. Find the row in the Results Grid.

4. Double-click on the row in the Results Grid to open the Edit Form for the selected Farmer.
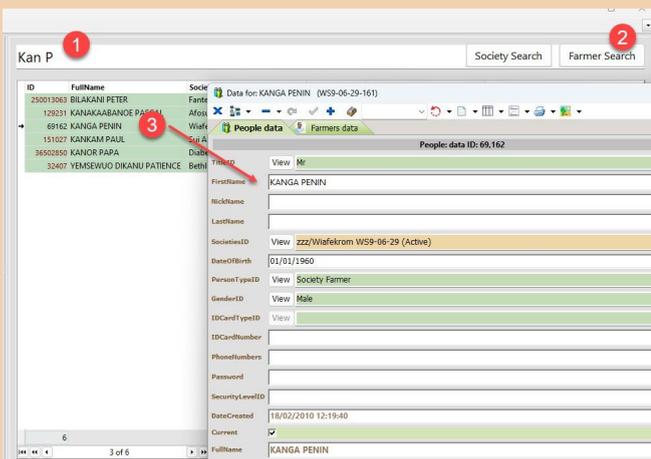
Finding and opening the farmer record

Adding Calls and Farmer Details from the Edit Forms
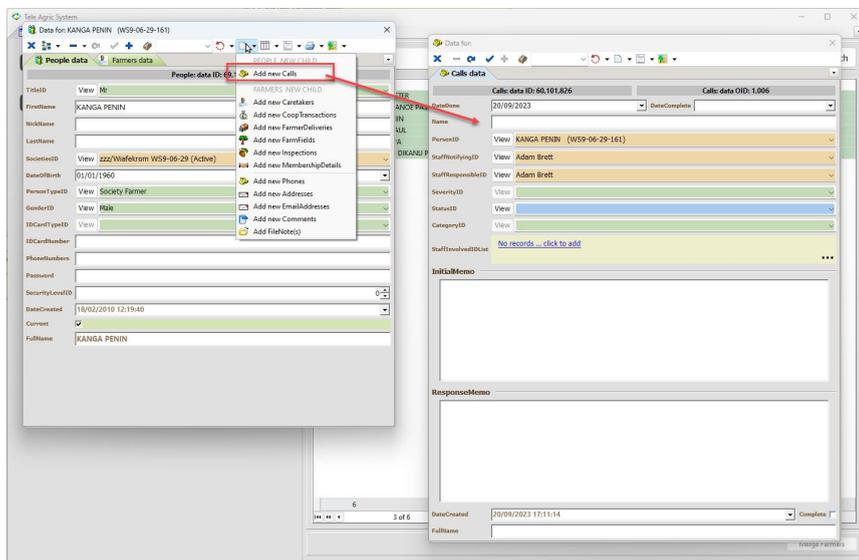
Adding new "Calls"

Once the Farmer's Edit Form is open, the information about the person will be shown. All details stored in the database for the Farmercan be found in parts of the the Edit Form, either on the "People data" or "Farmers Data". pages

To add a new Call the user should click on "Add new Calls" from the "New Child Record" menu, as shown in the image above. The Calls Edit Form will open.

Details of how to use the Calls Edit Form are further down in this help-topic.

Accessing Societies records from the TeleAgric Dashboard
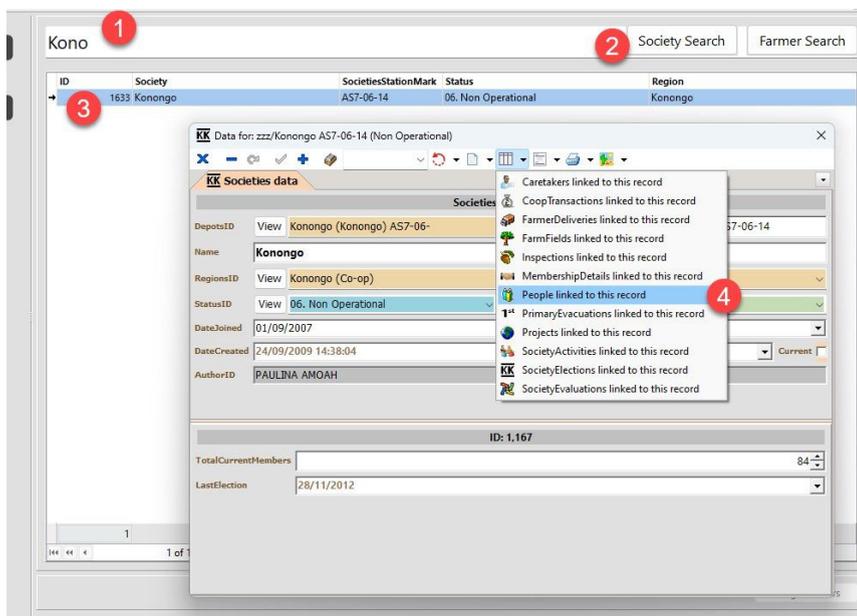
Accessing farmer details from the Societies Search

**If users first access a Zone record, to the find farmers of the selected Zone, take the following steps**

1. Type part of the name of the Society/Zone.

2. Click the "Society Search" button.

3. Find the Society in the Results Grid.

4. In the Edit Window, select "View Items", "People linked to this record".

Once the Society/Zone Edit Form is open the user can update data relating to the Society/Zone. From the People Edit Form they can access all data as via the direct Farmer-Search detailed above.

The Calls Dataviewer

The Calls dataviewer is marked with "1." in the image below.
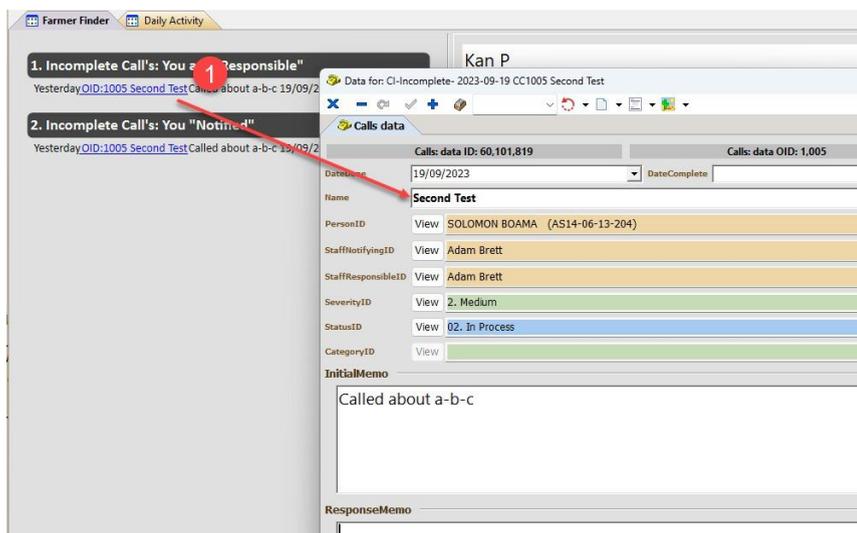
Accessing Incomplete Calls from the Calls Dataviewer

The calls dataviewer opens on the left hand side of the main screen of the TeleAgric dashboard. It lists all "Incomplete" Calls.

Usually a user will mark the "Status" of a "Calls" record "03. Complete" at the end of the call. This indicates that the work relating to the call has been completed. In this case details of the work done will be stored in the Calls record, but it will not reappear in the TeleAgric dashboard.

Users can leave some Calls "incomplete" (with a status of "Investigate" or "In Process") in this case the calls will remain visible to them, so they can check on their progress and completion.

The TeleAgric Daily Activity Worksurface

This part of the TeleAgric system is shown in the image below.
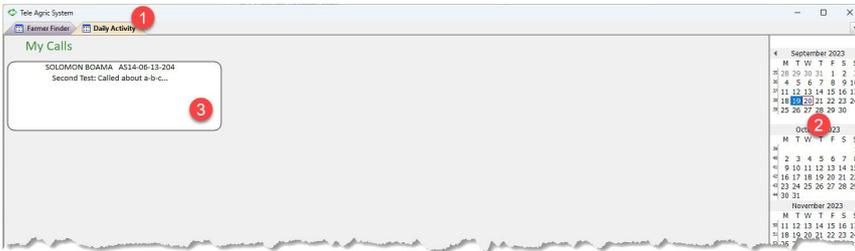
TeleAgric Daily Activity Worksurface

The second screen of the TeleAgric Dashboard is a "Daily Activity" worksurface. This brings together all the items a user has worked on**per day**. It is a useful way to navigate work done per day.

1. Click on the "Daily Activity" tab to access this part of the Dashboard.

2. Click on a date, to show Calls records for the selected date.

3. Calls for the selected date will show. **Double click** on any item to show its Edit Form.

Actions within the TeleAgric Dashboard

The main data-entry process for TeleAgric staff is to log their calls in the Calls Edit Form. The parts of this form, and how to use them are detailed below.


Parts of the Calls Edit Form

1. Date Fields: These record the date when the Call was made or received, and the date when the issue was resolved. Often the "DateDone\" and the "DateComplete" will be the same.

2. Name field: This is used to **title** the call. The user can write any words they wish.

3. Severity, Status and Category: These fields contain lists the user can pick from to set the type of Call that is being made.

4. Initial Memo: The user must write something in this field to provide details of the call.

5. Response Memo: If a follow up is needed, the user can use this field to add extra details about the Call.

Merging Farmer Records

The KKFU database unfortunately includes a good number of duplicate farmer records. Part of the work of the TeleAgric system is to find and merge these records. To do this undertake the following steps.
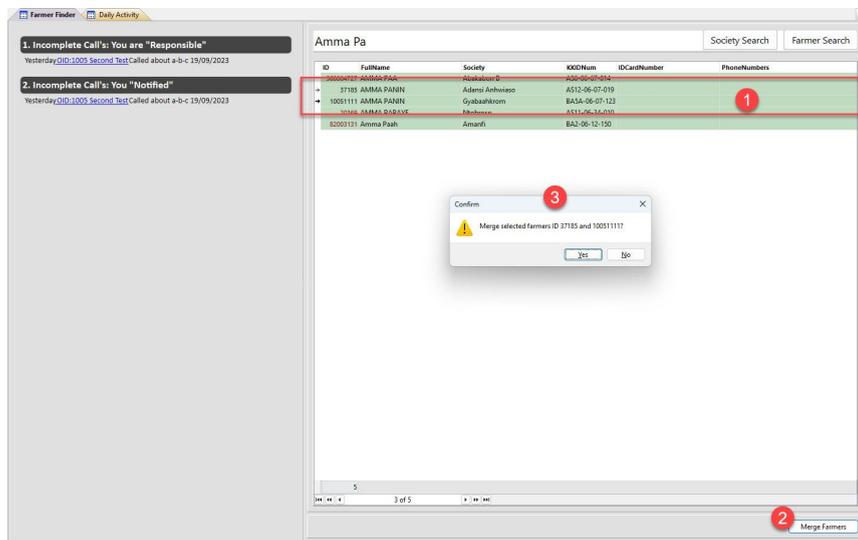
Merging Matching Farmers

1. **Shift Click** two records in the results Grid showing duplicate farmers. When this is done the "Merge Farmers" button at the bottom of the screen will become active.

2. Click on "Merge Farmers" button.

3. When asked to confirm click "Yes".

Note that when the "Merge" procedure runs a **database stored procedure** called "MergePeople". If there is a need to change the funtionality of the "Merge People" process in the TeleAgric dashboard, it can be done by making changes to this procedure. The code of the TeleAgric Dashboard program does not need to be updated.