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Comprehensive Data Management for Excellence in Union Management

- Data Research Group Corporation -

UNION FUSION DESCRIPTION DOCUMENT

union fusion

connect | communicate | collaborate

This document last modified on January, 2015

Abstract

This document provides the fundamentals for understanding the key elements of Union Fusion, DRG's enterprise system for managing 'All things Union'. This document will address key modules on the basis of their access through the primary and secondary menus that make up the user interface.

This document is not intended to be exhaustive regarding features and functions inside the framework, but will provide a sufficient overview to help new or prospective clients to familiarize themselves with the UF. Additional documents and information can be found at www.unionfusion.com.

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CONTENTS

INTRODUCTION 3

UNION FUSION 4

DASHBOARD 4

Dashboard 5

Homepage 6

Charts & Tables 7

Tasks 8

Messages 9

Calendar 10

DOCUMENTS 11

File Explorer 12

Query 13

CONTACTS 14

People 15

Companies 16

Groups 17

Committee Meetings 18

Mailings 19

Advanced Search 20

Settings 21

MEMBERSHIP 22

Members 23

Memberships 24

Assessments 25

Settings 26

EVENTS 27

EDUCATION 28

Students 29

Applicants 30

Instructors *31*
Classes *32*
Courses *33*
Test Questions *34*
Evaluations *35*
Settings *36*
Upgrades, Work Reports, Career Paths and other misc. *37*
FINANCIALS 38
Process Dues *39*
Orders *40*
Payments *41*
Batches *42*
Contributions *43*
Accounts *44*
Disbursements *45*
Settings *46*
OUT OF WORK LIST 47
Active List *47*
Dispatchers *48*
Job Orders *49*
Settings *50*
ORGANIZING 51
Projects / Jobs *51*
FOIAs *52*
REPORTING 53
Queries *54*
Templates *55*
Search *56*
History *57*
Settings *58*
ADMIN 59
Security *60*
System & Organizational Settings *61*
References *62*

INTRODUCTION

Union Fusion is a browser-independent web solution built using Microsoft's ASP.NET architecture and SQL Server 2012/14. Union Fusion leverages DRG's **comprehensive framework** for business coverage across all union activity, real time! Union Fusion provides comprehensive access everywhere you have a computing device and an internet connection. Pull up member data on your iPad or mobile device. Union Fusion was designed to work with your current business activities by providing easy integration with your existing website.

The Union Fusion *supported modules* include the following:

- Total Contact Management
- Membership and Dues Management
- Education, Classes, OJT Hours, Upgrades
- Financials – Payments, Batch Processing, Account Management, Disbursements
- Communications (Emails, Text Messages, Voice Messaging)
- Reporting (Custom Queries, Exports, Custom Reports, Charting)
- Remittance Capture, Benefit Application and Management
- Content Management System
- Out of Work List / Referral Hall
- Organizing Tools
- Member Portal, Student Portal, Contractor Portal

There are numerous other processes supported within each of these modules. This document will expose a suffient level of detail on these related processes to give potential clientele enough information to make solid business decisions regarding the potential use of our system.

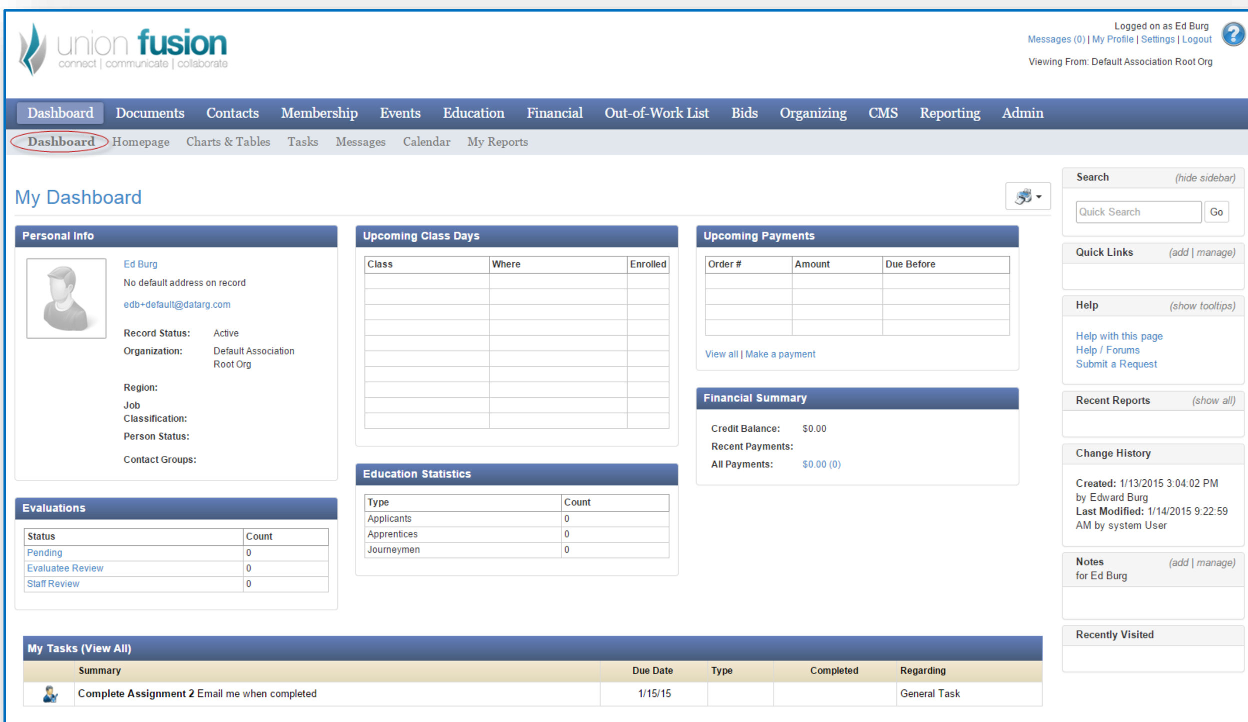
Union Fusion is the only cloud-based solution that concurrently supports all three verticals in Union activity: Membership & Dues, Apprenticeship Management and Benefit and Pension Management. As such, it becomes an excellent prospect for a universal reporting application as well. The architecture design is very consistent throughout which reduces the complexity of the learning curve for new end users. As a solution, Union Fusion exceeds our competitors in numerous ways. As an organization, our commitment to our customers is unequaled.

UNION FUSION

DASHBOARD

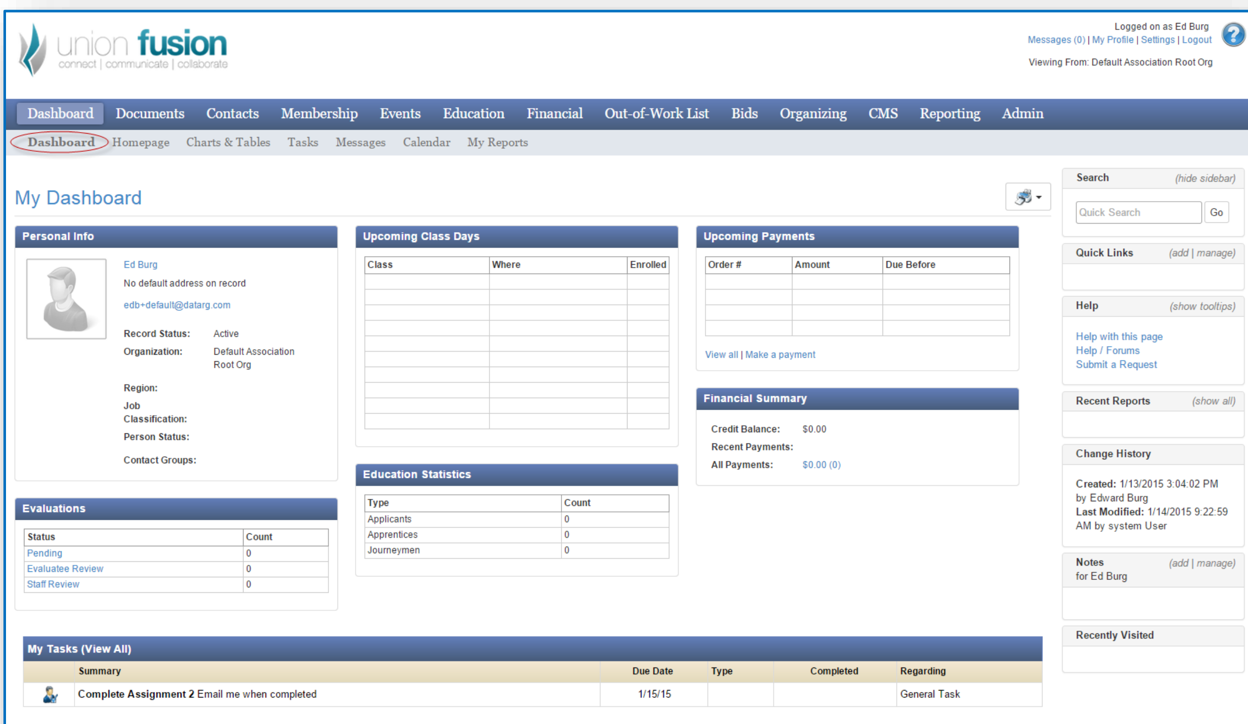
The primary menu item labeled dashboard contains a breadth of communication and reporting tools for personal use by the end user currently logged in. These tools include the default homepage, charts & tables, tasks, messages, calendar and 'my reports'. Much of the data populated in this area is initiated by numerous other interfaces in the solution. For example, when classes are scheduled for either a student or an instructor, they appear on the calendar for each one (student or instructor) as they are logged into the system.

A detailed description of each of these 2nd level menu items follows immediately in the information provided over the next few pages.



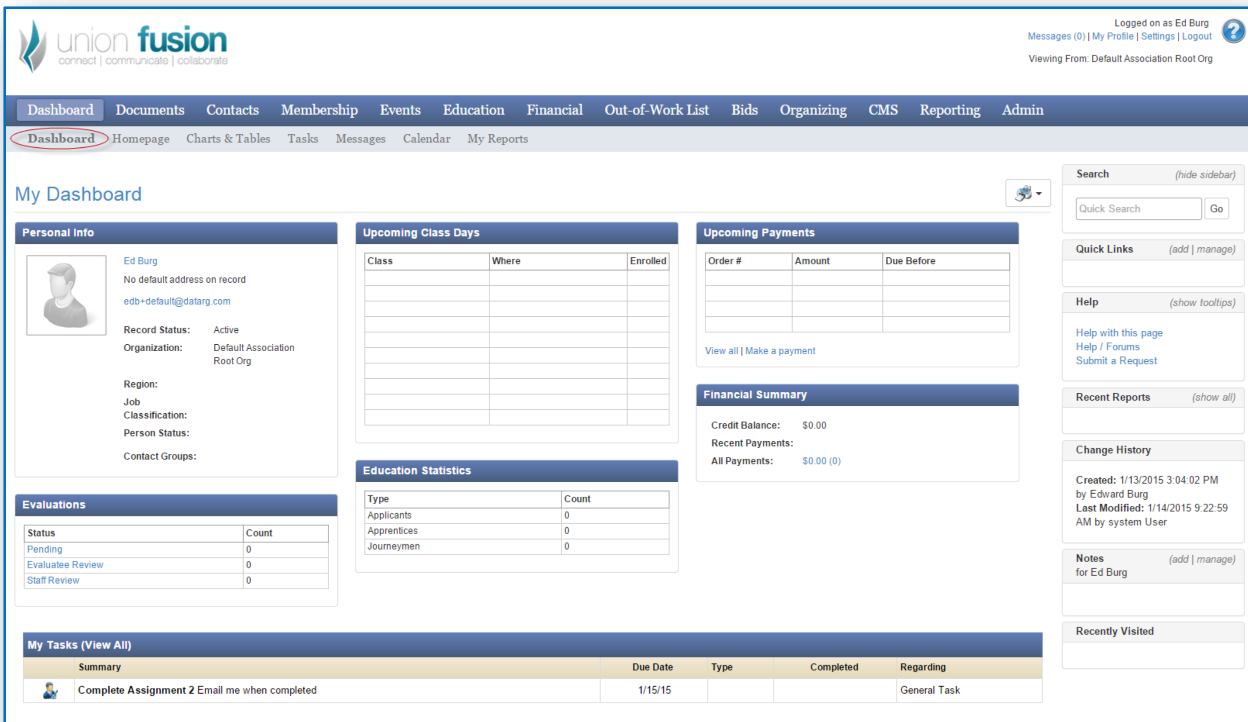
Dashboard

The dashboard is the primary landing page for end users when they log into the system. Although the default landing page can be changed or controlled by number of different ways, it is typically the dashboard that comes up following user login. The information that is viewable to the end user is dependent upon what permissions the end user currently has with respect to related modules. For example, if the end user is permitted to see membership or apprenticeship data, then there will exist content blocks containing summary information about both of those modules. The information contained here is largely informational and more often than not, end users will navigate to some other aspect of the interface to either find someone or some company or carry out a specific function.



Homepage

In most instances the homepage is the same as the dashboard. The homepage for each user however can be set under the user's profile settings. The function of the homepage is to provide an alternate method for viewing the information that come up by default when the end user logs in. Technically, it could be any interface in the system.

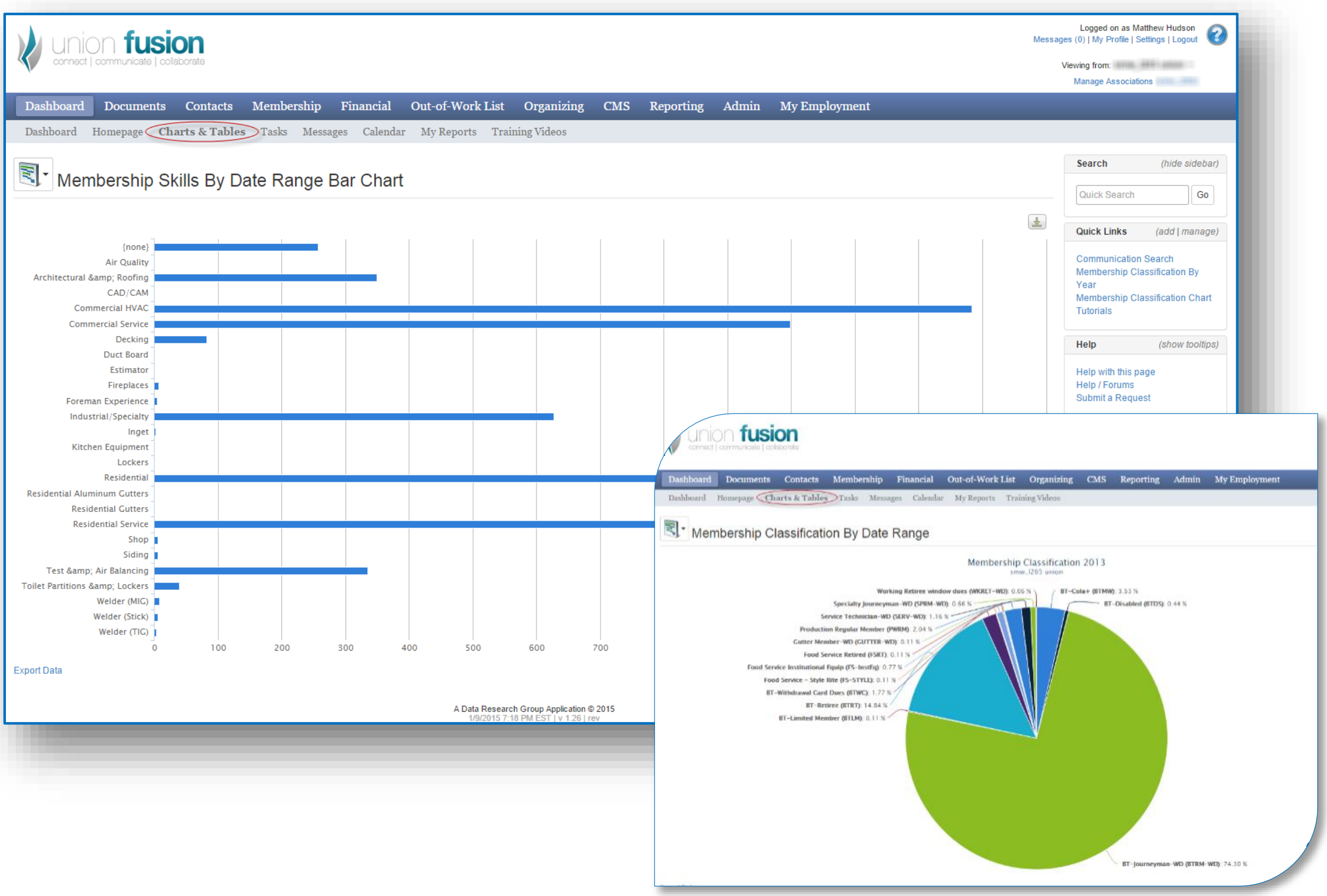


Charts & Tables

The chart functionality is very similar to the Microsoft charting function typically associated with Microsoft Excel. The charting function is designed to operate in association with the embedded data classes that exist in Union Fusion.

There are a number of options, some of which are required that must be defined when the chart itself is created. As with other reporting objects that exist in UF, the chart can be private to the user or exposed as a tool to the entire organization. There are additional options that allow individual end users to declare the chart as part of their dashboard display.

Chart types include: bar charts, column charts and pie charts. Column and bar charts also allow for series display. Generally speaking charts will display more cleanly when the amount of data being displayed in limited in some capacity.

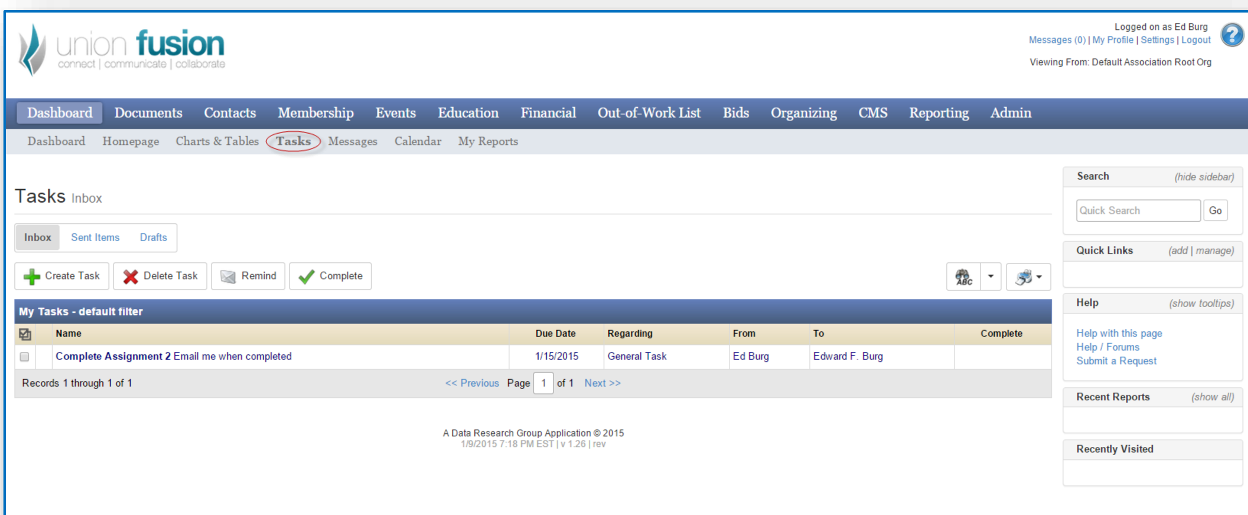


Tasks

Tasks can be created in numerous locations throughout the solution. From an end user perspective, outgoing, incoming as well as draft can be viewed. As the name implies, a task is a simplified means of directing a job (or task) to a person or a group of end users in the system.

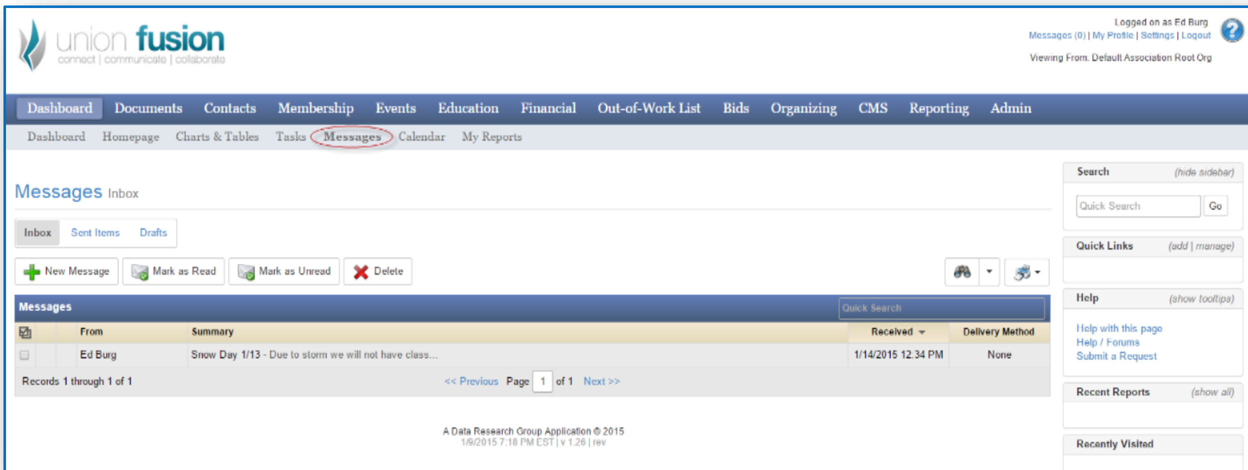
When tasks are created in the system, they allow end users to designate the recipients by way of an individual person or a group of persons (managed through contact groups). Each task going to each person(s) on the recipient list has an independent completion Boolean and date associated with the task to show completion back to the person who originated the task in the first place.

When tasks are created, there is an additional option to send a reminder email to the recipient(s).



Messages

Messages are very similar to tasks except they are considered a means of 'one-way' correspondence. There is no completion property associated with the message and like tasks, the end user initiating the task can send out an email to the recipient as an alternate means of communication.

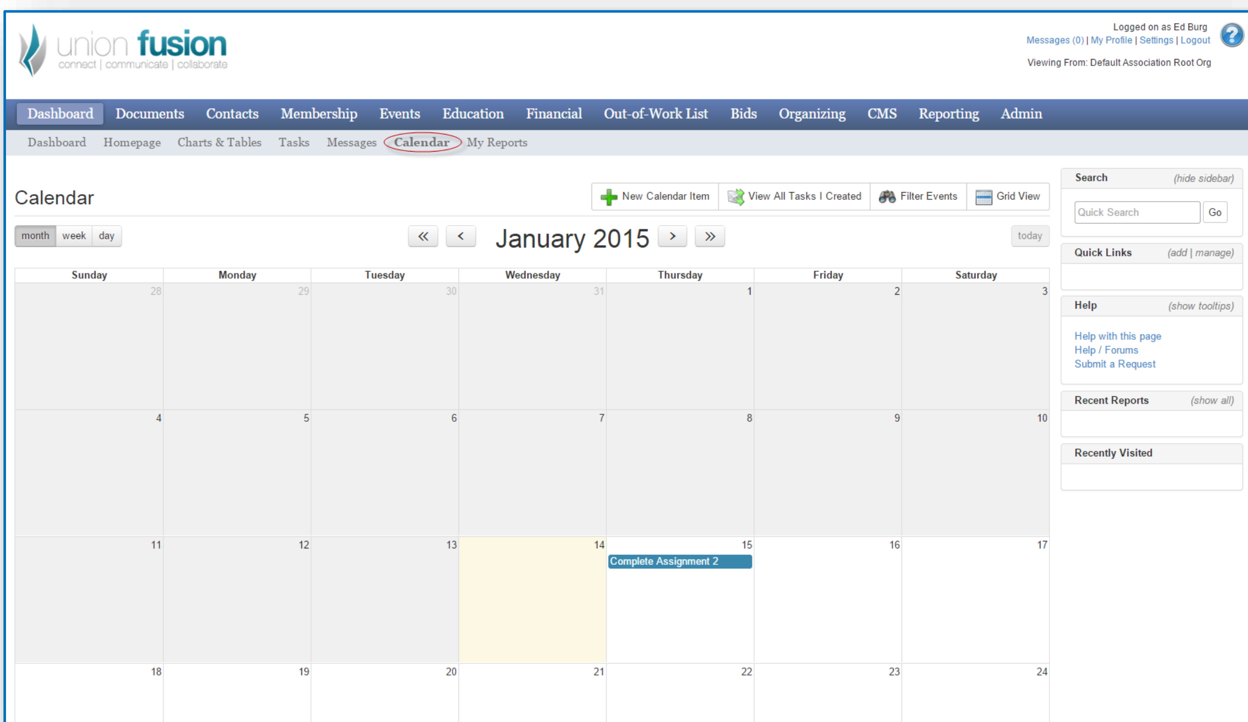


Calendar

As its name implies, the calendar object records all calendared items associated to the end user that is logged in.

These calendared items can occur by way of: classes, events, tasks, committee meetings, simple calendared items (meetings) and anything that associates the properties of an identified person and a scheduled date.

There is color legend to represent different types of scheduled items in the system. The information existing in the calendar is intended to be one way for display (read only). Although, the end user does have the ability to create what is called a simple calendared item from this display.

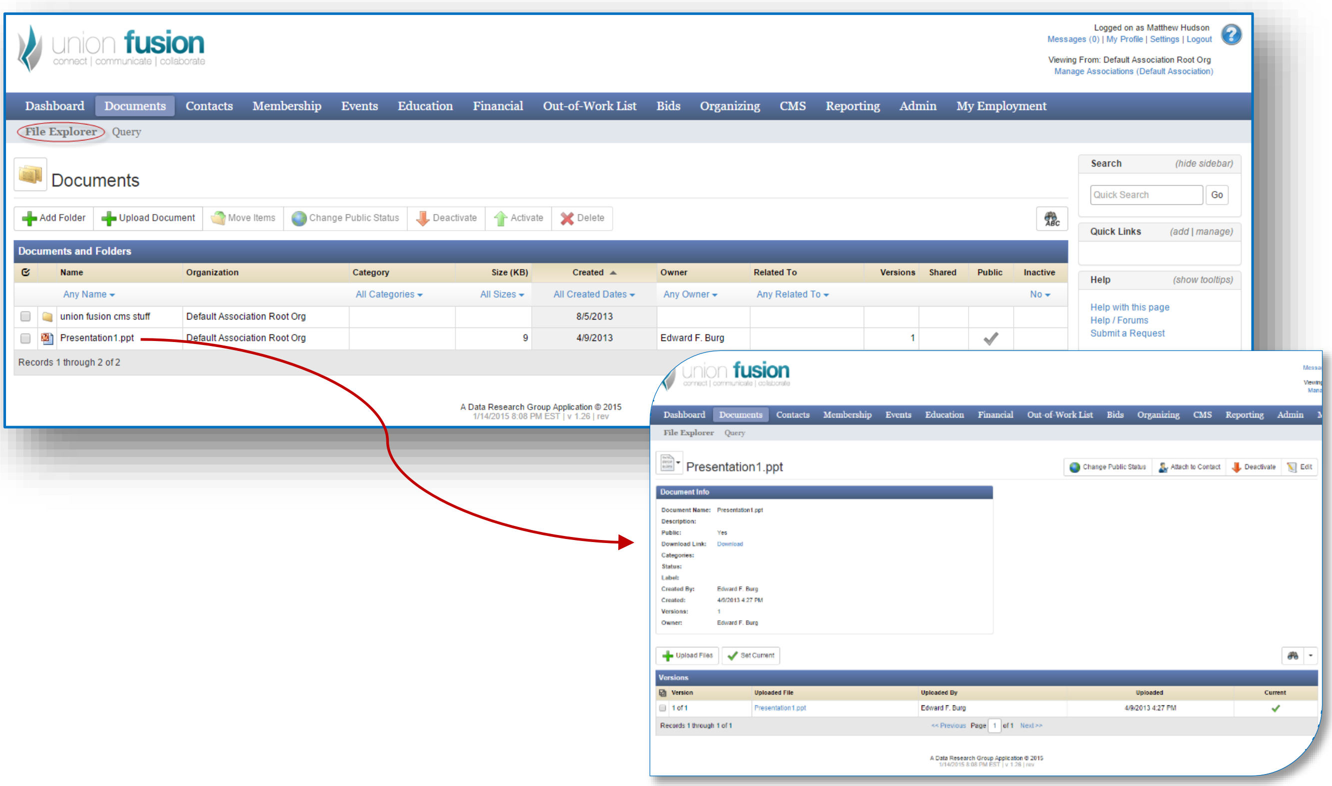


DOCUMENTS

Data Research Group maintains its own document repository or document manager. This module is capable of storing documents independently or connected to items in the system like people or companies.

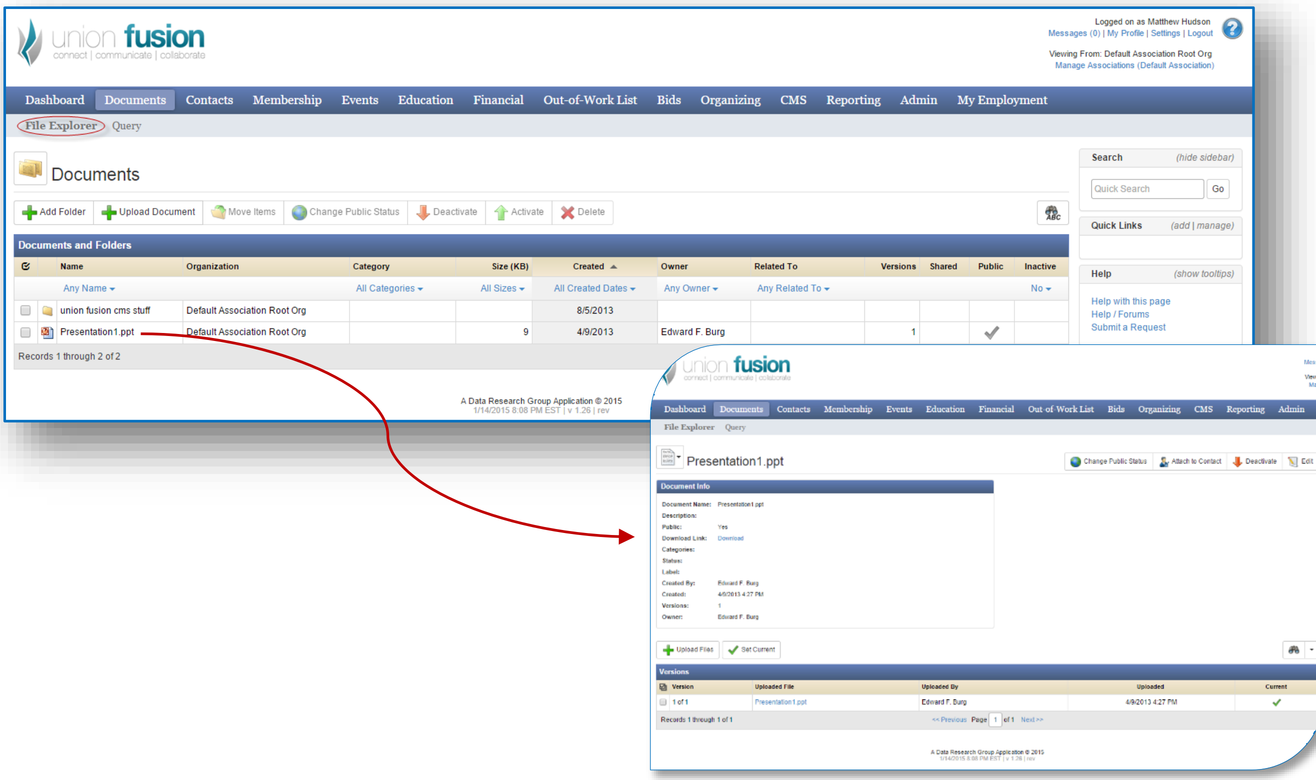
Each document profile is capable of storing multiple versions of the same document so they a historical record can be maintained.

There is no document limit or storage limit in terms of the amount of space taken up.



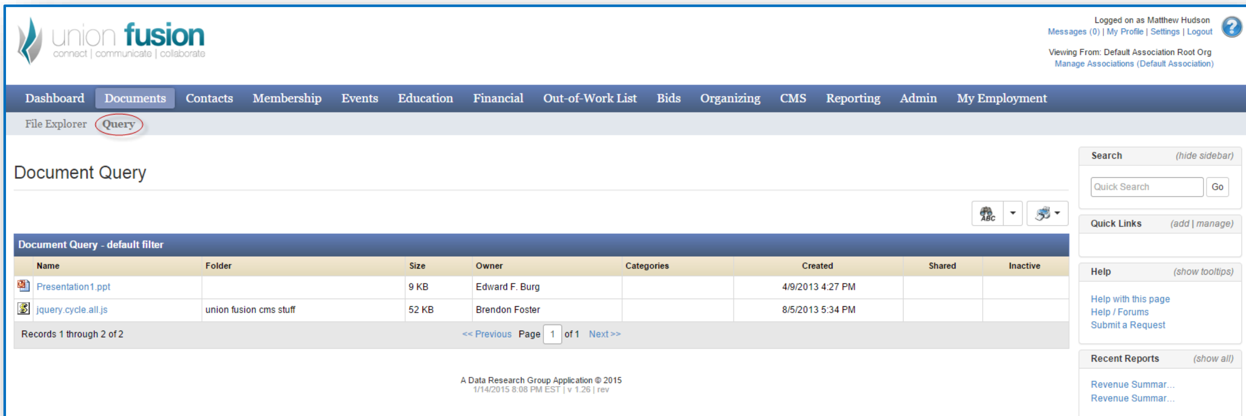
File Explorer

The file explorer view allows end users to view documents in a similar capacity to the window file explorer. You can create folders and subfolders and store documents in any select folder where your permissions allow.



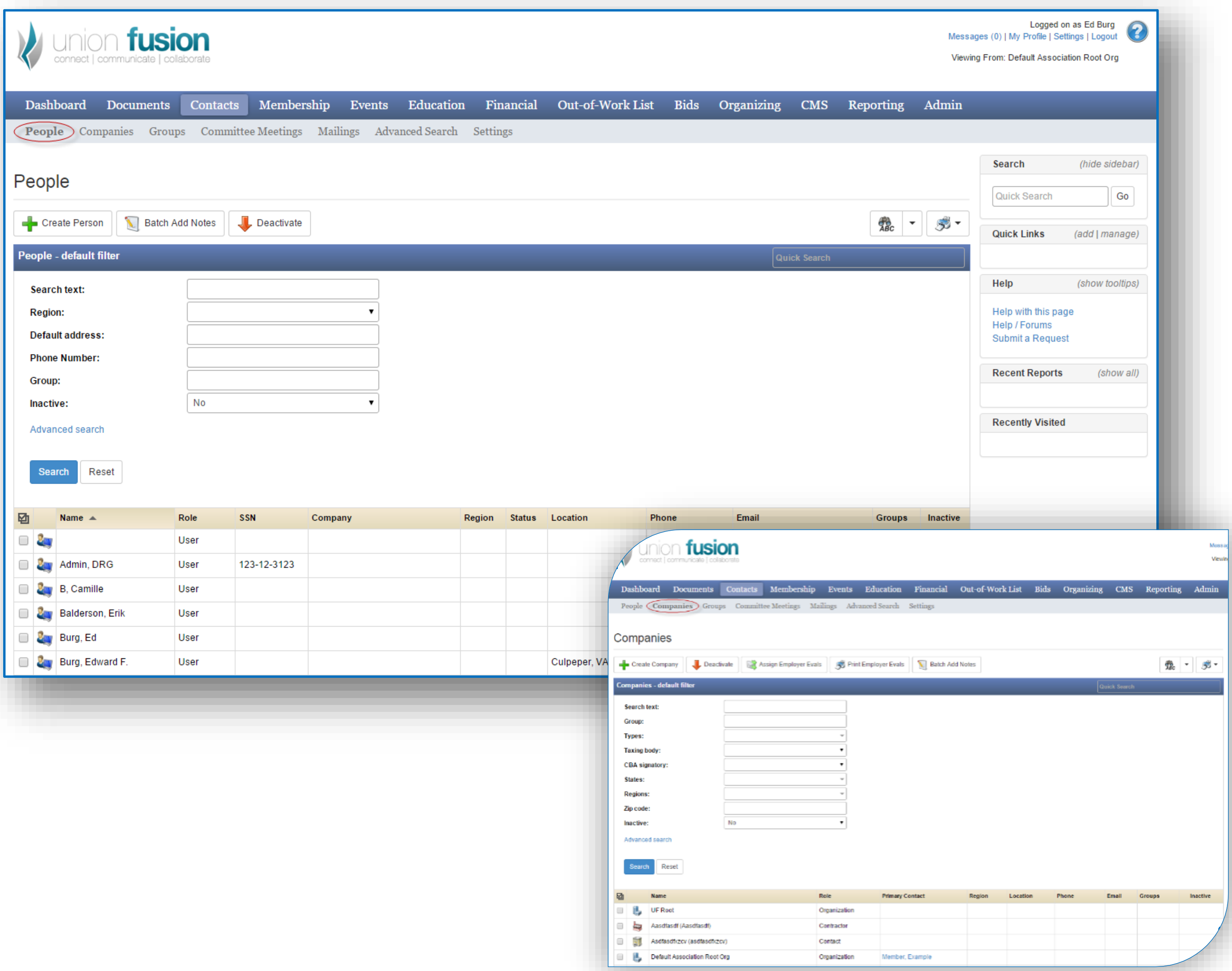
Query

The query view for documents is a special view that flattens all of the files regardless of what folder or sub-folder they might exist in. This allows end users to conduct search across all file against file name description or some other characteristic.



CONTACTS

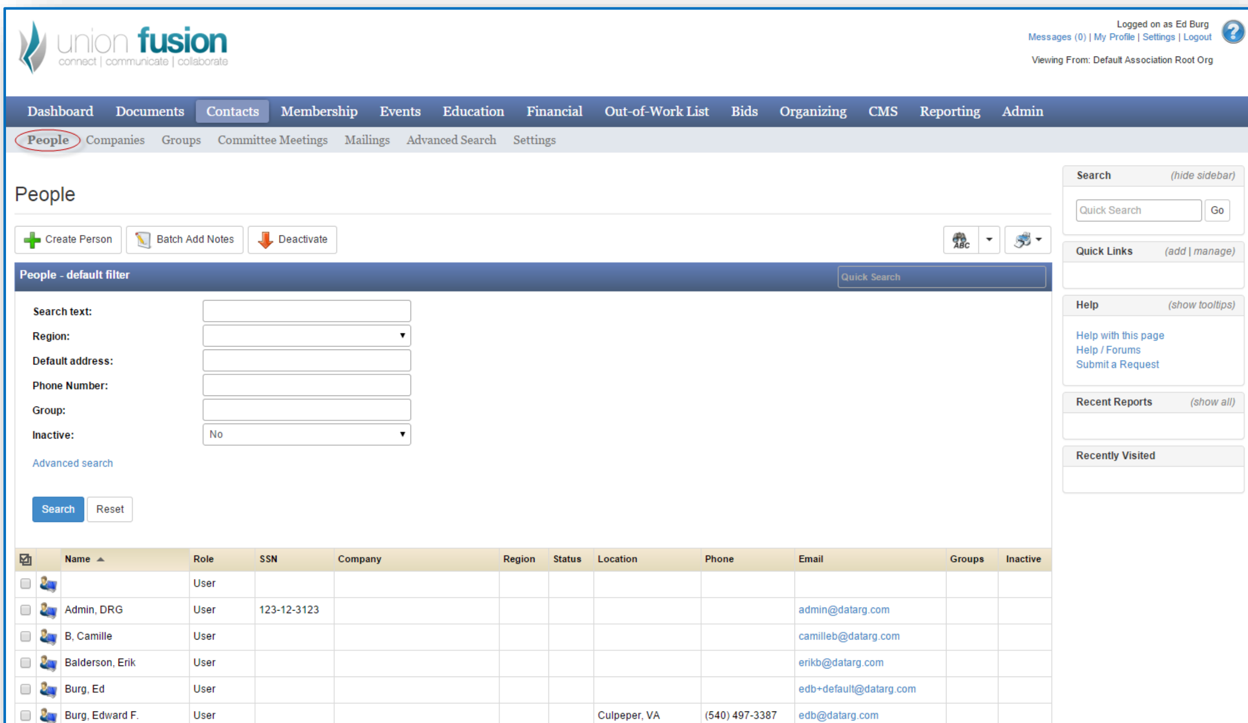
The contacts module stores information on people and companies as well as some important related items. That will be discussed in detail below. It is important to remember that people can take on multiple roles and as such individual profiles for people can be seen in other parts of the solutions… for example students or members as well as others.



People

This interface provides access to all people stored in the solution database, irrespective of the role or roles they may hold. There is filter capability built in to build custom or run saved filters against the existing data.

Records can be selected and dealt with in batch capacity by end users with the appropriate permission level. Selecting a record from the 'people' grid will take you to the person's profile and provide access to all items related to that person and the roles they serve in.

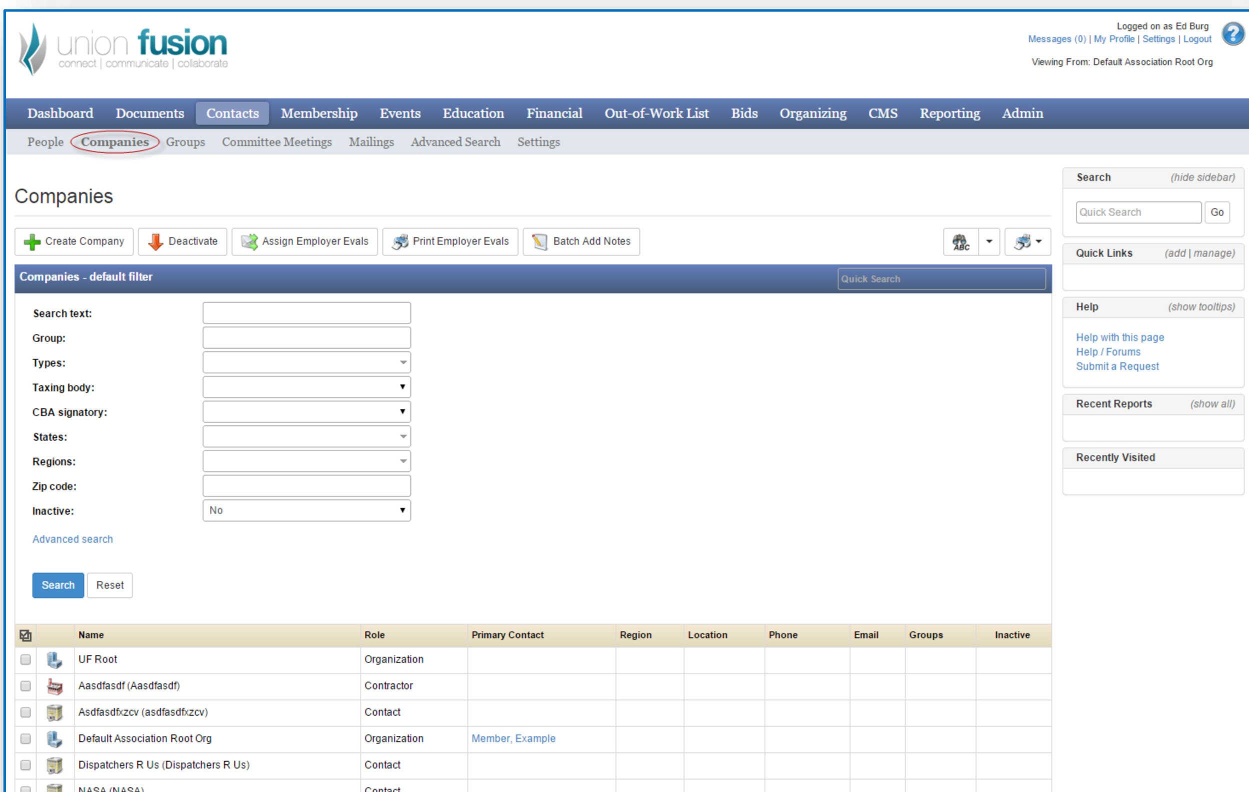


Companies

This interface provides access to all companies stored in the solution database, irrespective of the role or roles they may hold. There is filter capability built in to build custom or run saved filters against the existing data.

Records can be selected and dealt with in batch capacity by end users with the appropriate permission level. Selecting a record from the 'company' grid will take you to the company's profile and provide access to all items related to that person and the roles they serve in.

Due to their nature, selected companies will also reveal access to the people working for that company currently.

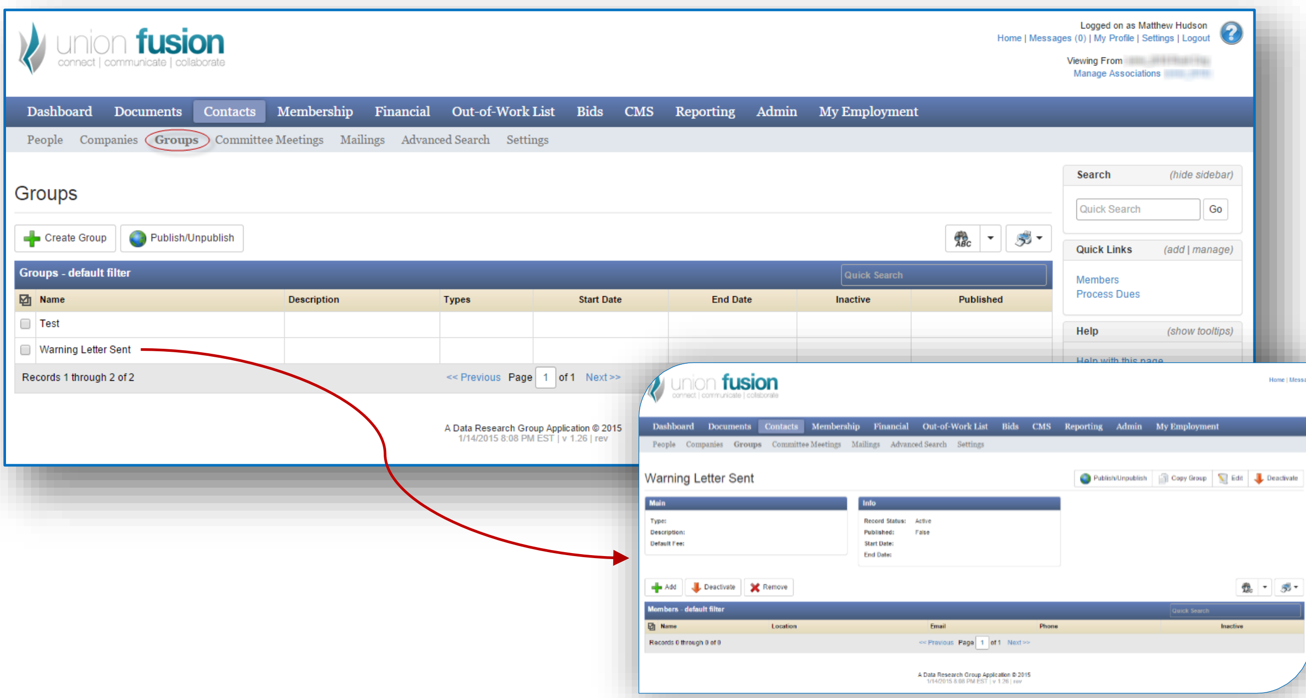


Groups

A contact group is an object that provides end users with the ability to form an arbitrary group of people or companies. There is no system defined purpose for the group except in the way that the org may use that group.

Typical applications for group use include communication or executing a function against more than one person at a time.

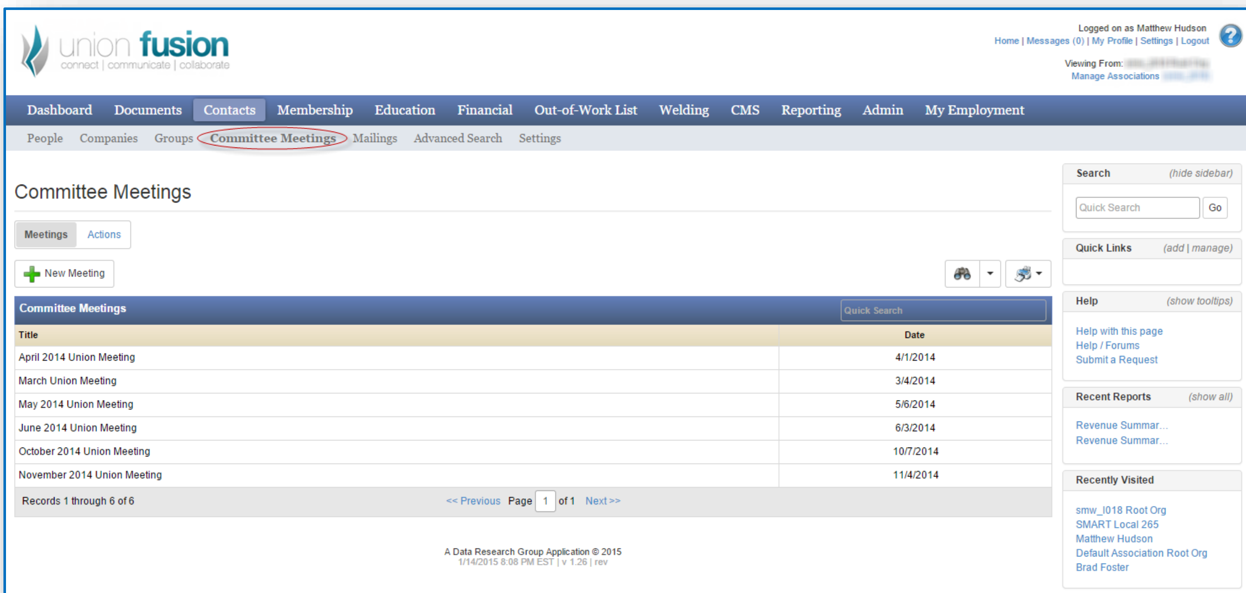
There are numerous functions in the system that can leverage the group concept such that the function can be applied to multiple individuals at the same time.



Committee Meetings

The committee meeting is an arbitrary meeting that allows administrators to call the meeting and invite multiple people. The meeting can serve whatever purpose is intended by the organization. In schools for example, administrators can schedule students that require disciplinary actions. There are numerous applications for the use of committee meetings only limited by creativity.

Committee meetings will show on calendars to participants and have options for communication and reporting.

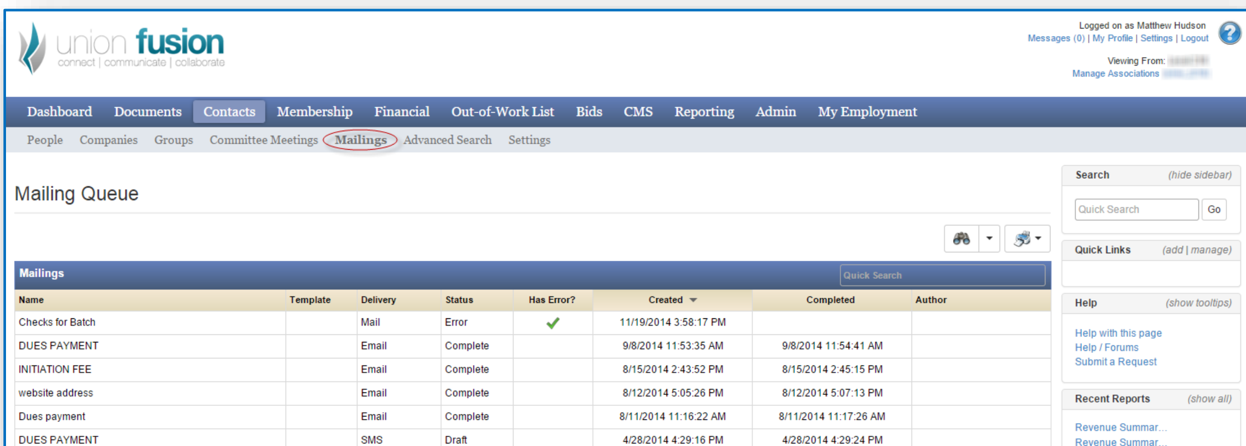


Mailings

Mailings are a special object used to capture generated reports that have yet to be printed. A mailing is a simple way UF uses to capture multiple reports into a single object.

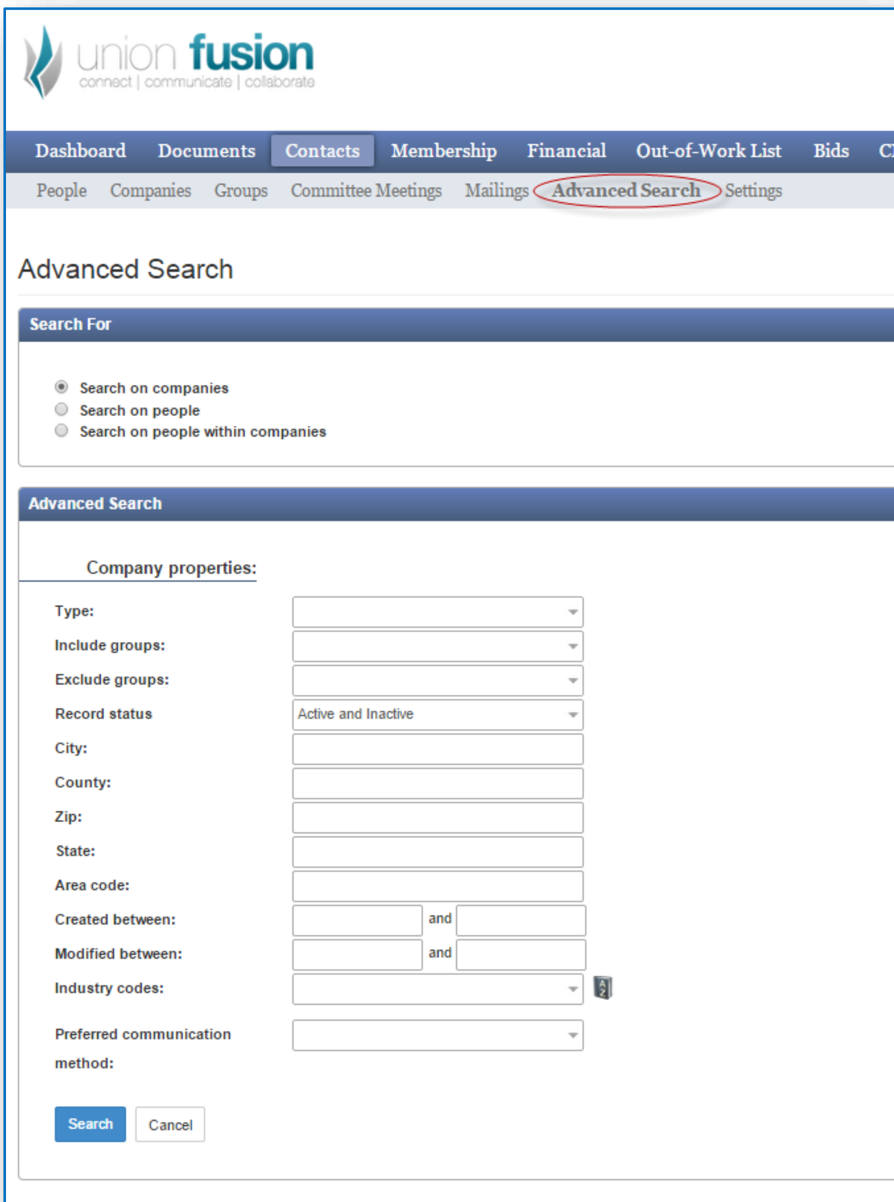
A sample mailing could be a batch of checks that require printing or a set of benefit applications to will be mailed to benefit recipients.

Mailings are system generated and be archived and retrieved at a later point in time. Each mailing represents a collection of reports that are typically the same report, but can be different.



Advanced Search

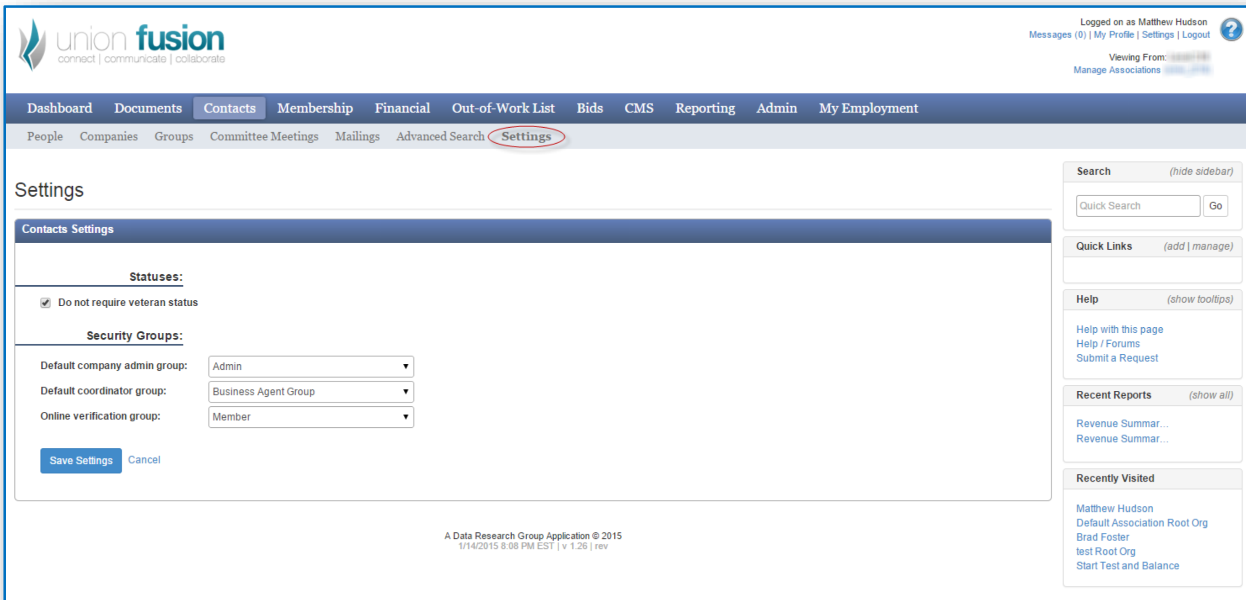
The advanced search under the contacts module is a special interface that provides direct access to filter down on a very common set of fields (properties). It follows a filter-by-form format that is very easy to understand and naturally intuitive to most end users.



Settings

Settings' menus are common on many of the main modules and serve the function of providing configuration options to that particular module.

The settings will vary depending upon the module they are supporting. A solid understanding of these configuration settings are gained through training with knowledgeable personnel.

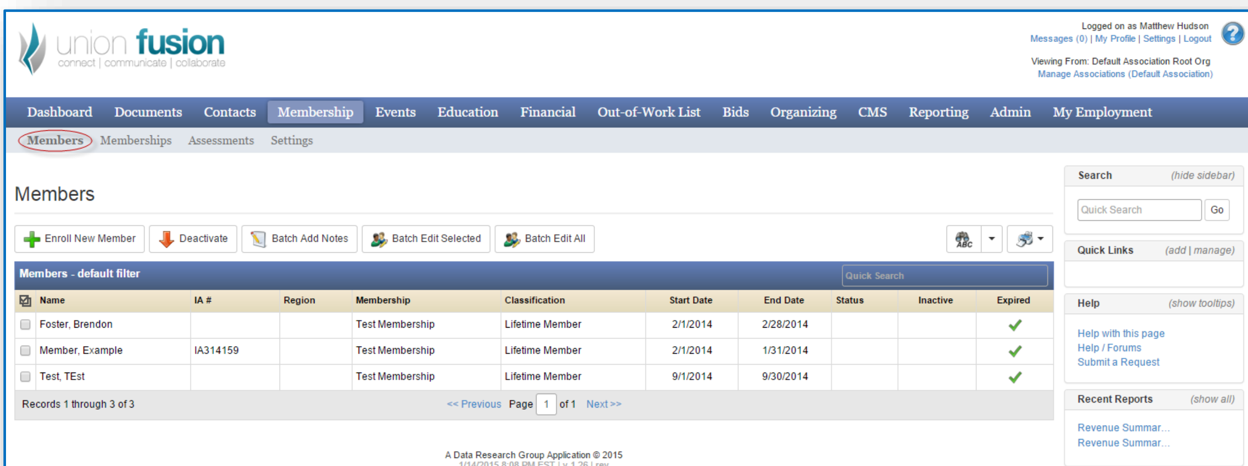


MEMBERSHIP

The membership module provides access to the central pieces associated with the concept of membership. These would include: members, memberships and related classifications, enrollments, assessments and related configuration settings.

While the number of menu items is small, there is a tremendous amount of functionality integrated with these 2nd level menu items that are all part of membership. Because of the nature of membership, there is also a heavy financial integration piece that should be considered/understood when using this particular module.

Finally, the configuration settings that are a part of membership are substantial due to the numerous different ways union organization capture and record dues.

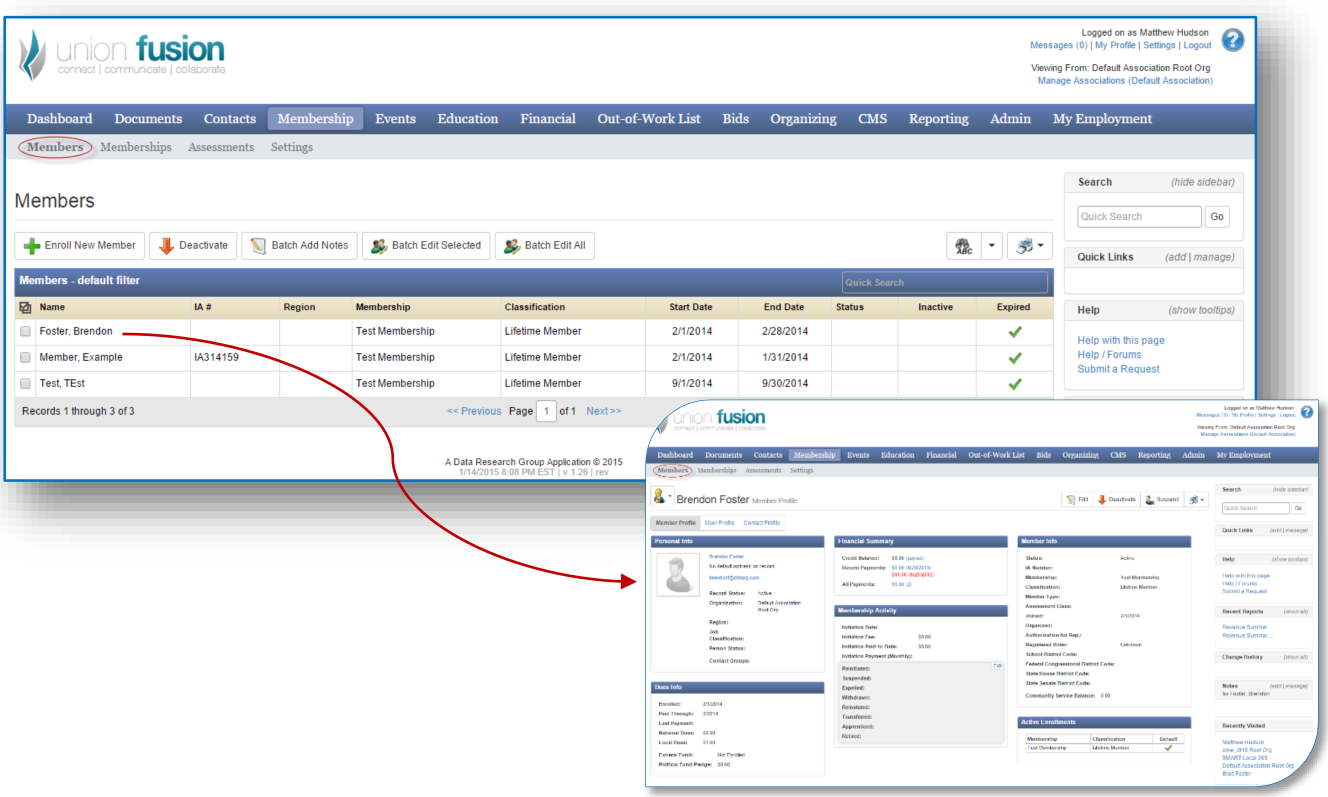


Members

The members grid provides a filterable list for queries and reporting specifically to people that, are currently… or have in the past, been a member. A member is defined as anyone who has had or does have an active enrollment.

To the local union, the member's grid and related features and functions serve as the primary data class for activity. As such, gaining familiarity with this grid and the member profile is of primary importance to new organizations using the Union Fusion web solution.

For local union office, the member list is perhaps the most queried list in the entire solution as it connects many of the important pieces together.

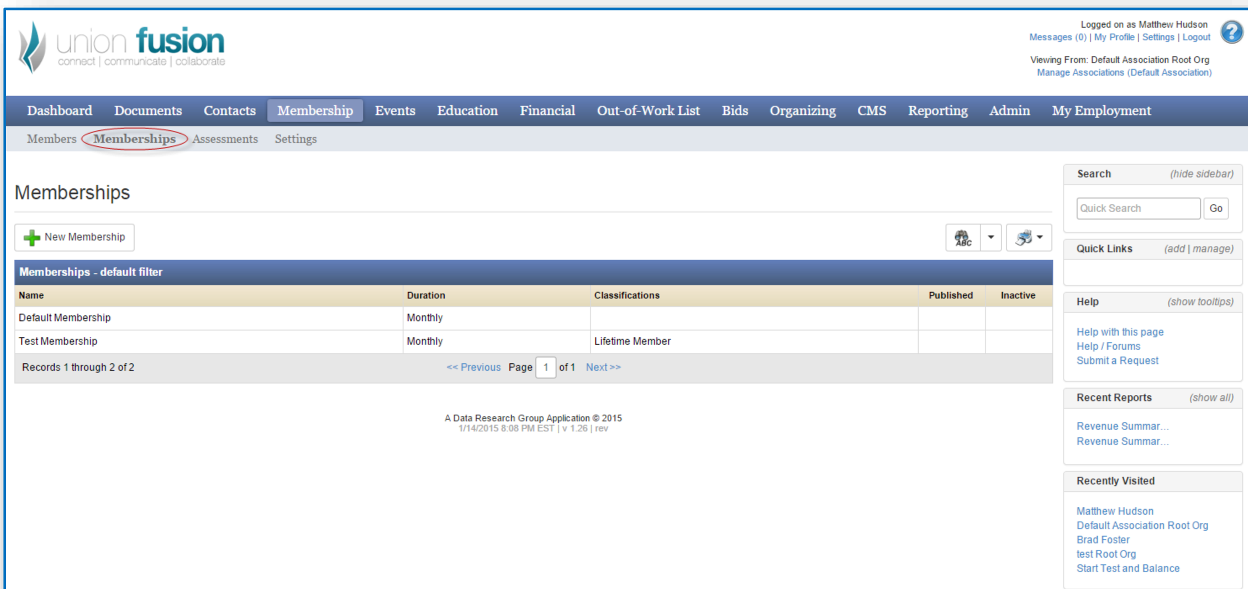


Memberships

Memberships are a broad way that Union Fusion classifies the ability that a person has to connect with a local union. When a person enrolls with a Local union office, they do not actually get a membership, but rather a membership classification.

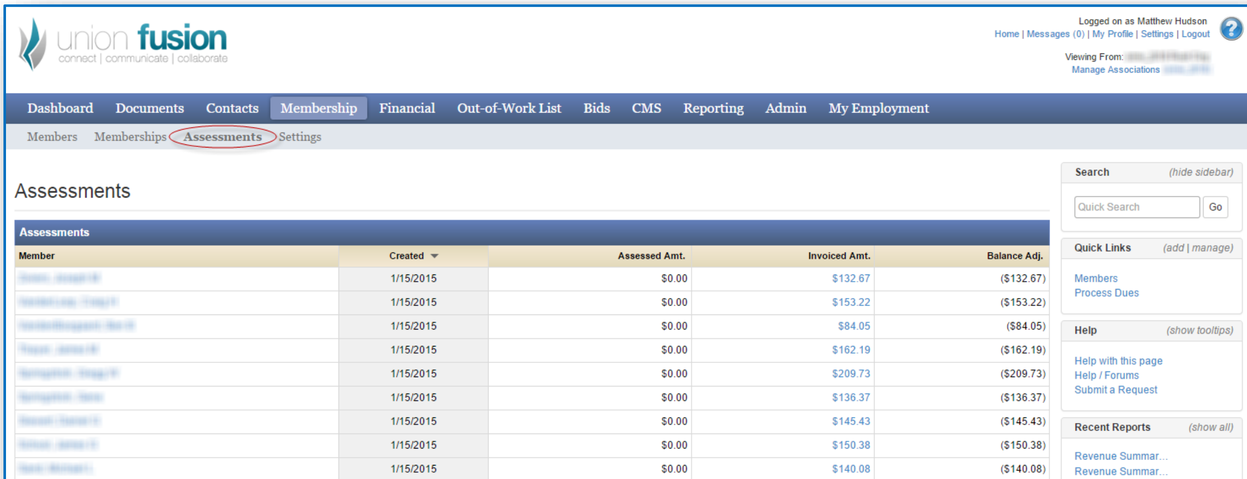
There can be multiple classifications associated with each membership. This gives the local union the ability to price each membership classification out differently.

When a member enrolls in a particular membership classification, the money received for dues under that classification can be split into multiple accounts.



Assessments

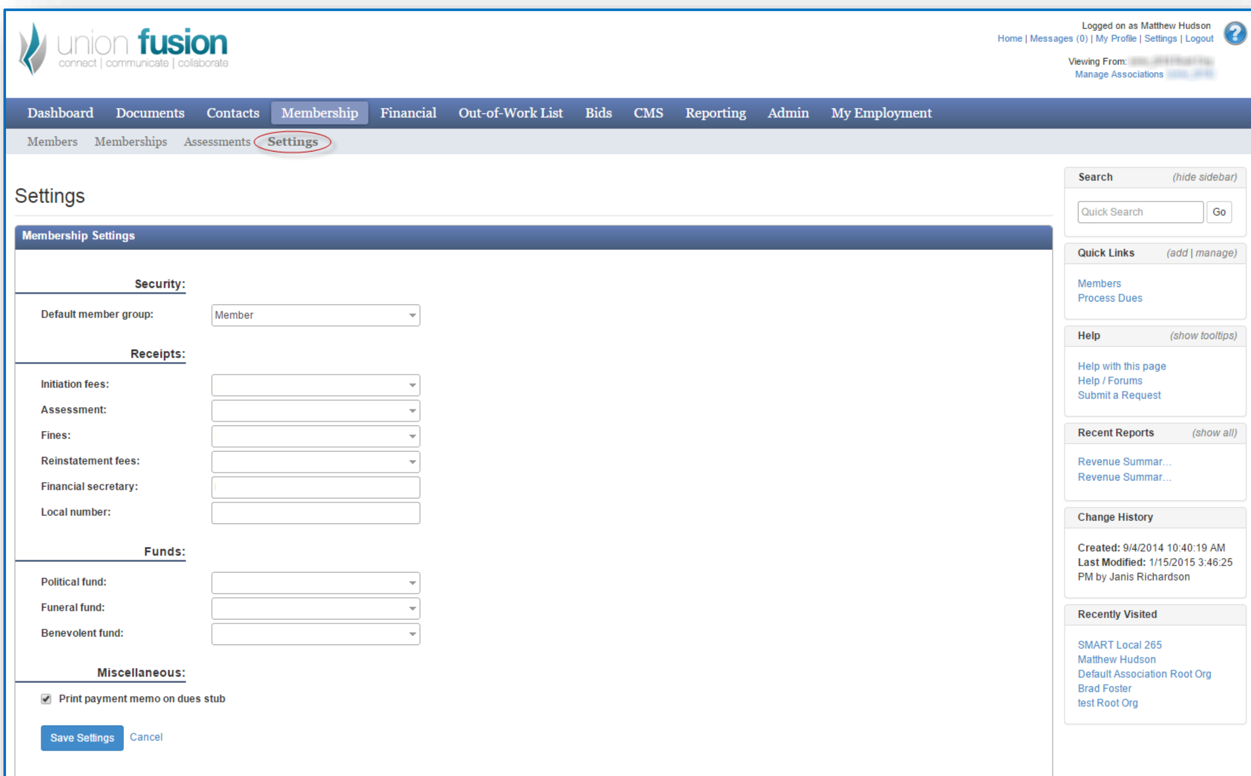
Working dues and assessments provide a means for local unions to assess dues on the basis of hours worked as opposed to a static amount associated with the membership classification. The working dues can be calculated as a result to generate an invoice on the basis of the multiplier for a particular job classification.



Settings

The settings area provides a unique set of configuration options associated with the membership module that define a large number of possibilities. Under most circumstances, administrators will want to protect the settings associated with this module so that standard end users cannot access or alter the information stored here.

There can be repercussions associated with dollar amount allocations into various accounts when dues are paid for a member on a monthly basis. Additionally, once the system has been setup, it may be wise for administrative staff to consult with Data Research Group employees prior to making changes to this particular 2nd level menu item.



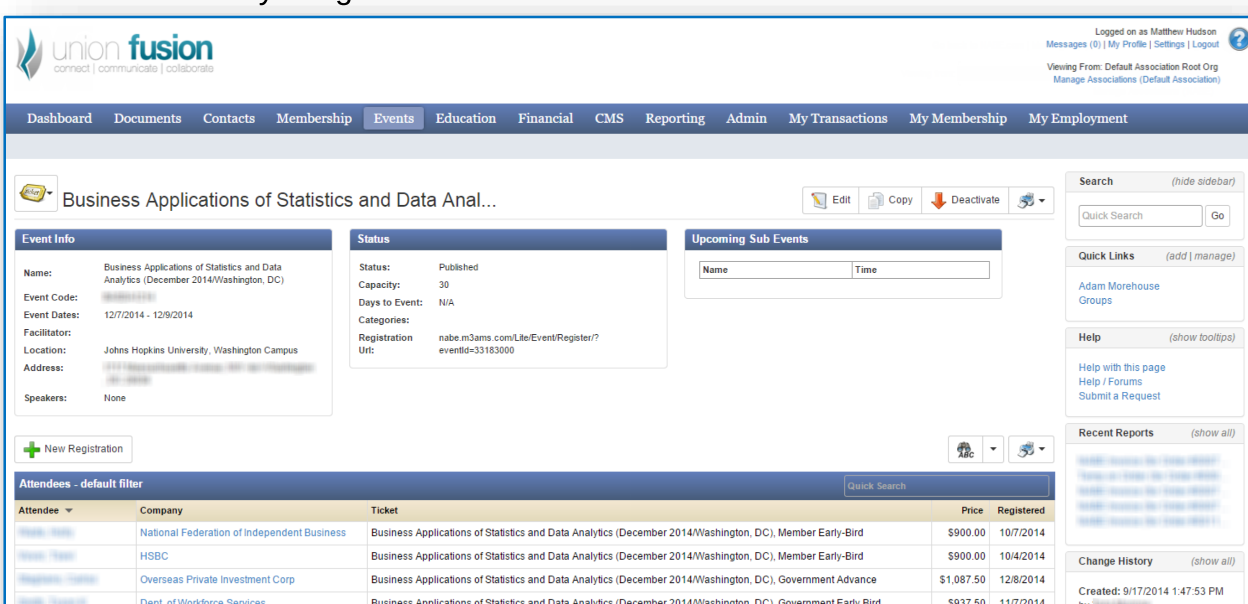
EVENTS

While the ‘events’ module does not contain related 2nd level menus, there are nonetheless a number of related items to a single event that end users should be familiar with. These include: sub-events, tickets and registrations.

Sub-events are a simply a way to divide events up further. Often times, conferences have multiple sessions that are held even sometimes simultaneously to appeal to the member audience. Each session can be listed as a sub-event in union fusion. Sub-events are optional.

Tickets are a way to group one or more subevents together and sell to a potential customer at a particular rate. Tickets also contain date ranges that allow organization to offer early bird specials on tickets if they purchase prior to a specific date.

Registrations are the culmination of selling one or more tickets to one or more members. The events module is both very simplistic and in some ways complex based primarily on the needs of the local union office. All events have what are referred as lite pages that integrate with the local union website for a more natural check out process to the member. They integrate card services and financials as well.

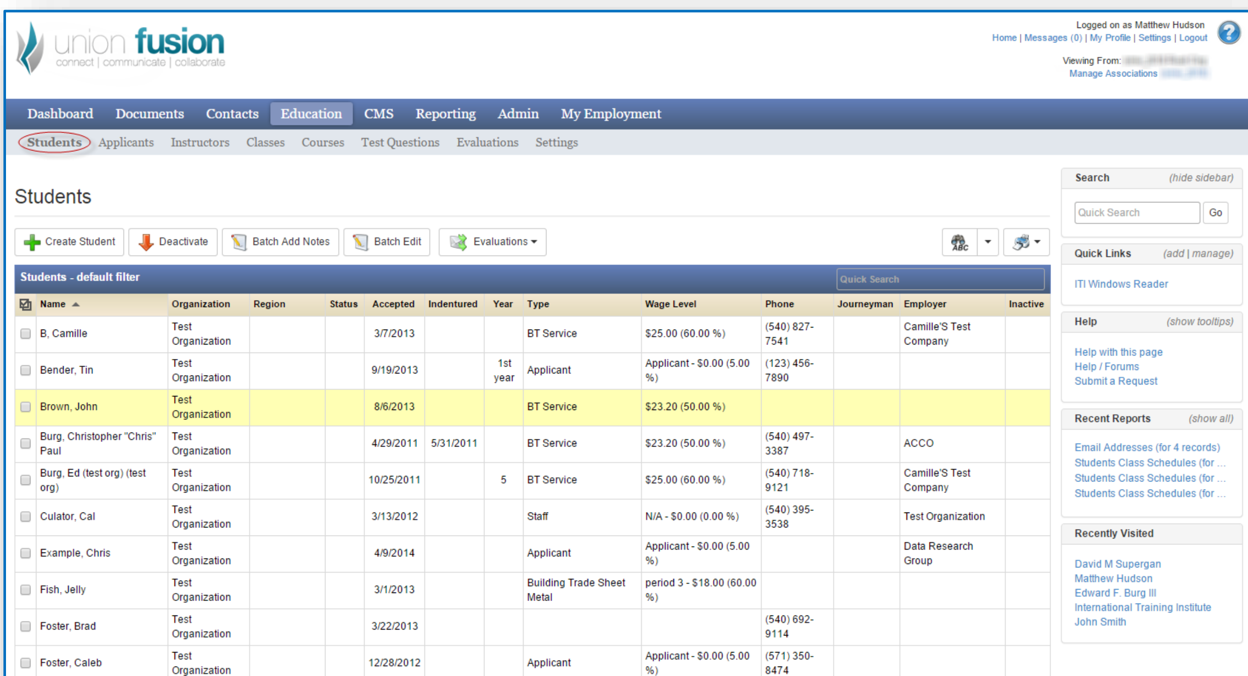


EDUCATION

While the education module for construction trades and local unions is its own module, it is perhaps the most complex in terms of its capabilities and built in functionality. There are a number of 2nd level menus as well as 3rd level menus that stem from the use of education. In this white paper here, we will only discuss functionality down as far as the 2nd level options.

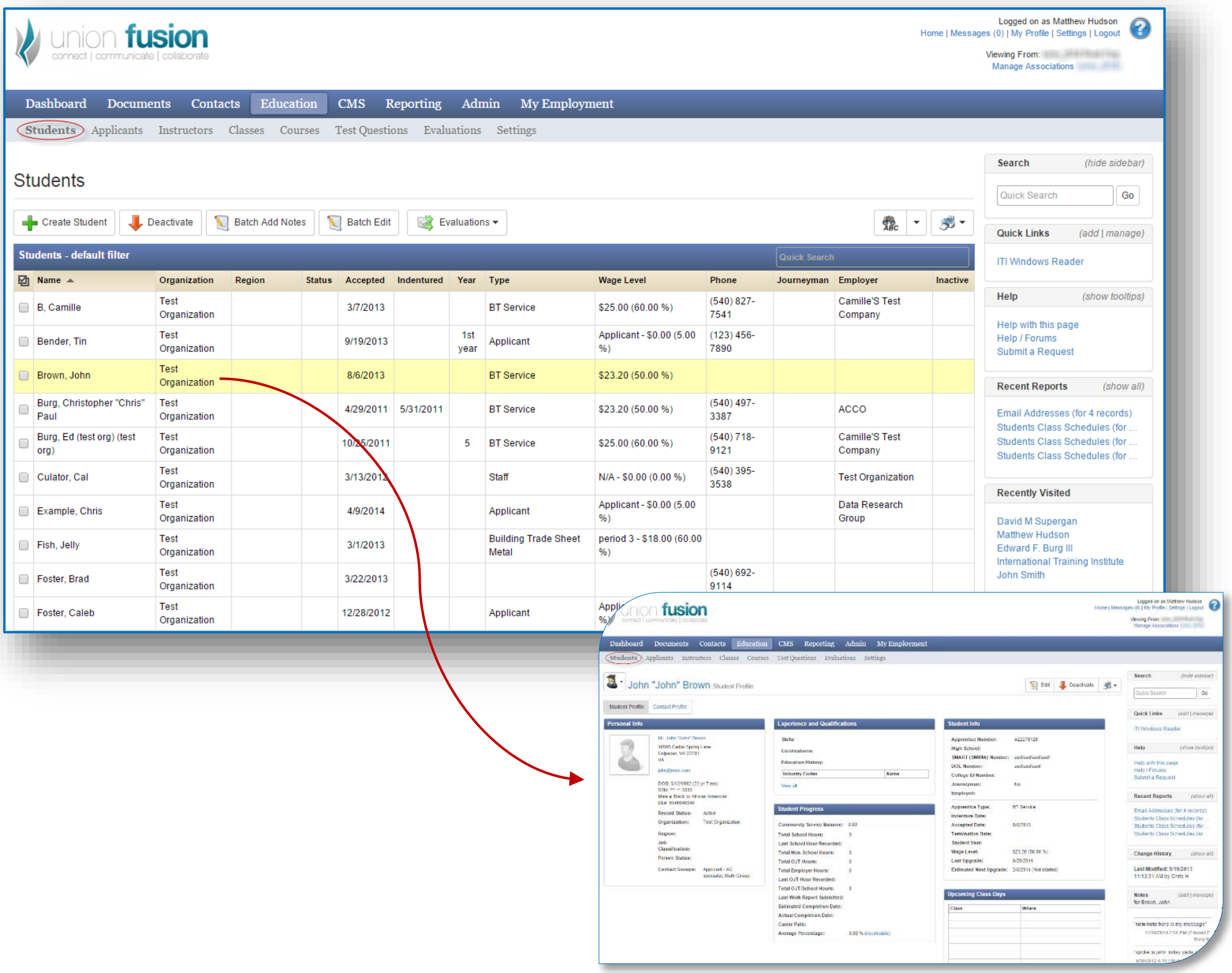
These options include: Students, applicants, instructors, classes, courses, test questions, evaluations and settings.

It should be noted that although it is not a menu item at the first or second level, our education module also supports costs and financial integration as well as the concept of upgrades associated with many construction trades.



Students

Within the education module, the student's grid and related profile is perhaps the most important. The vast majority of information collected within the system is related to, in some capacity or another, students. The student grid is filterable by way of a large number of fields. Custom filters can be created and saved for future use. The student grid also contains numerous related reports that can be generated and then printed on the basis of selected students.

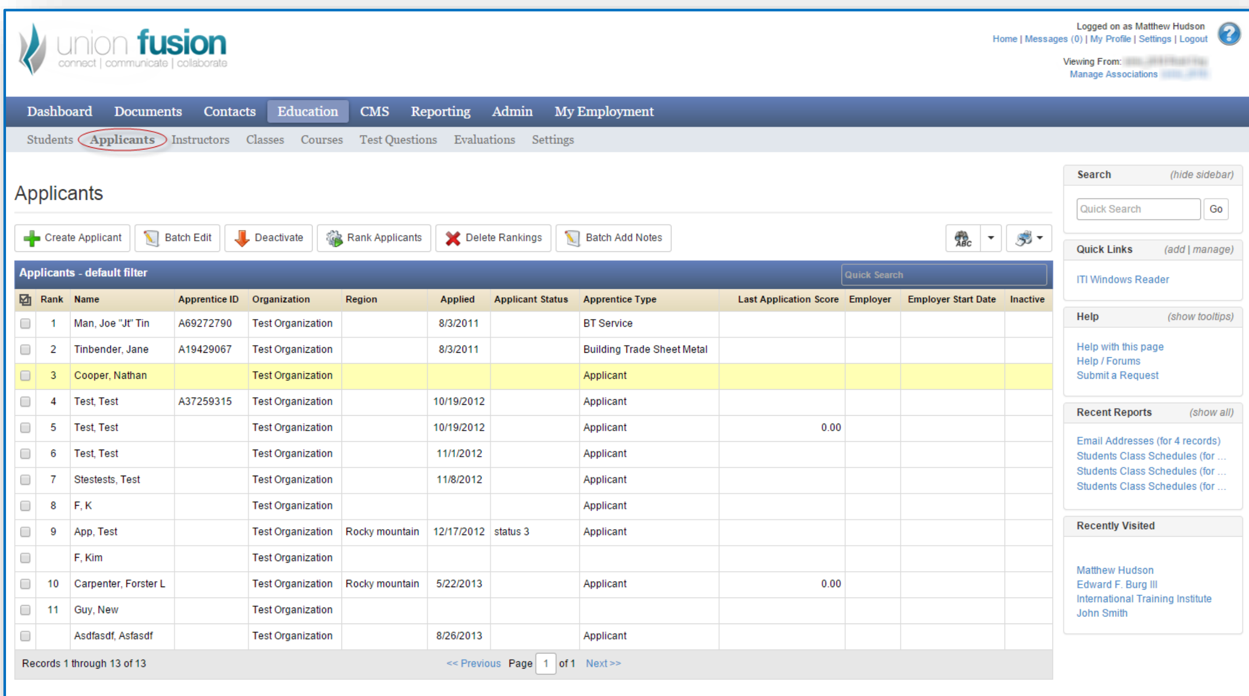


Applicants

Applicants are similar to students in the UF framework, except that they have not been approved or accepted into the program. As such, they are maintained in a separate list. The UF framework will still allow end users to relate numerous items to the applicant's profile in keeping with normal the normal practice of training centers.

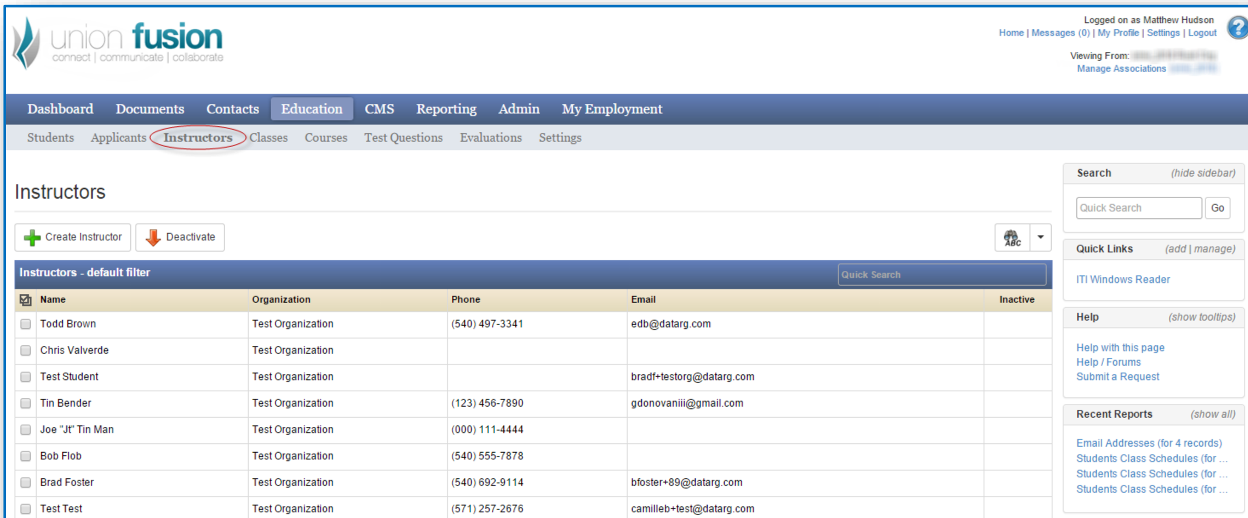
When information is related to the applicant, it will remain historically. Individuals who are applicants simply inherit a new role when they transition to a student position.

Applicants can have multiple related applications exist against their record for evaluation as they seek to enter the program.



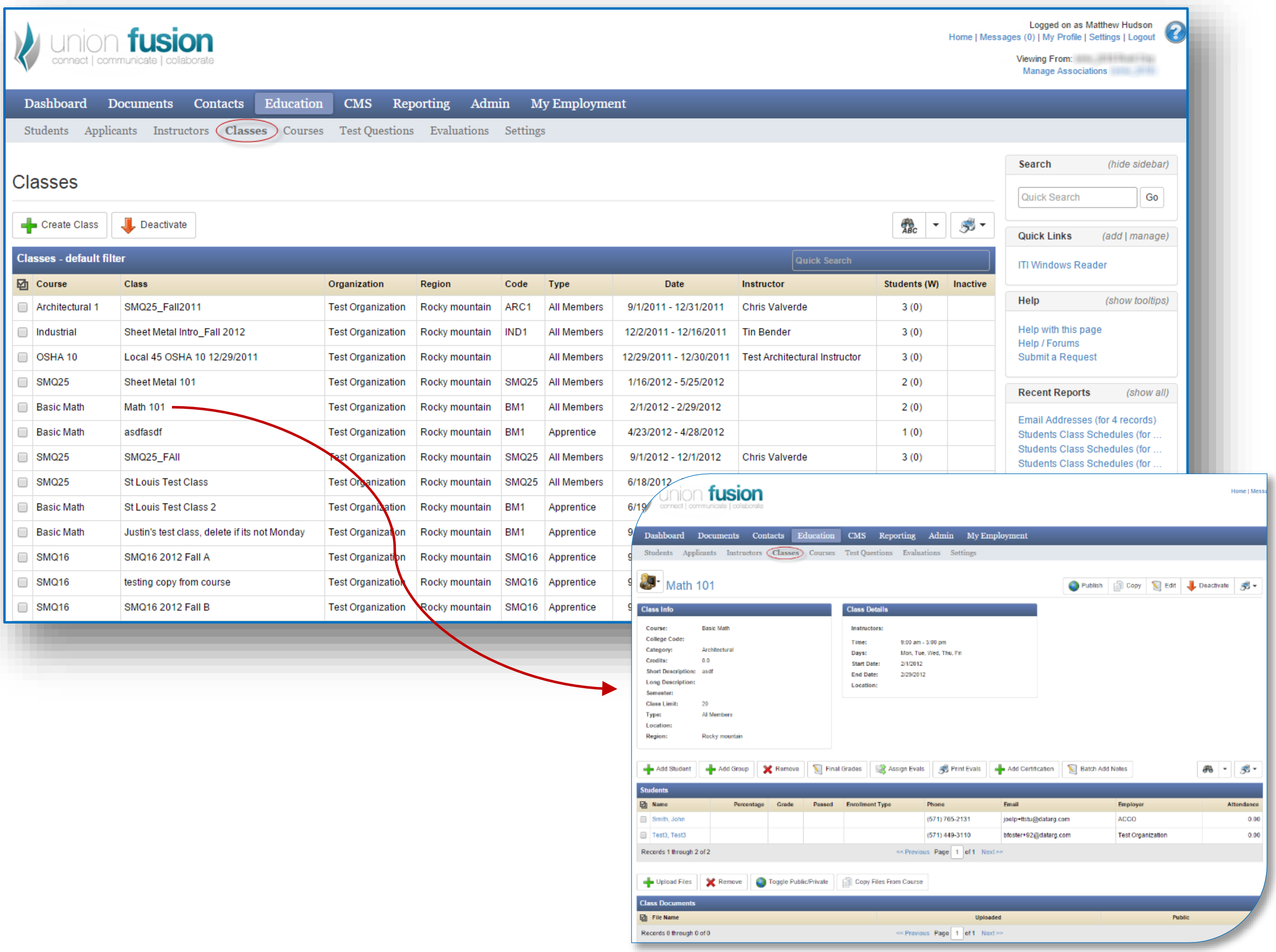
Instructors

The Instructors grid provides access to existing, active instructors. This grid is not used all that frequently but does provide access to add new instructors or access the instructor pool of individuals for further documentation.



Classes

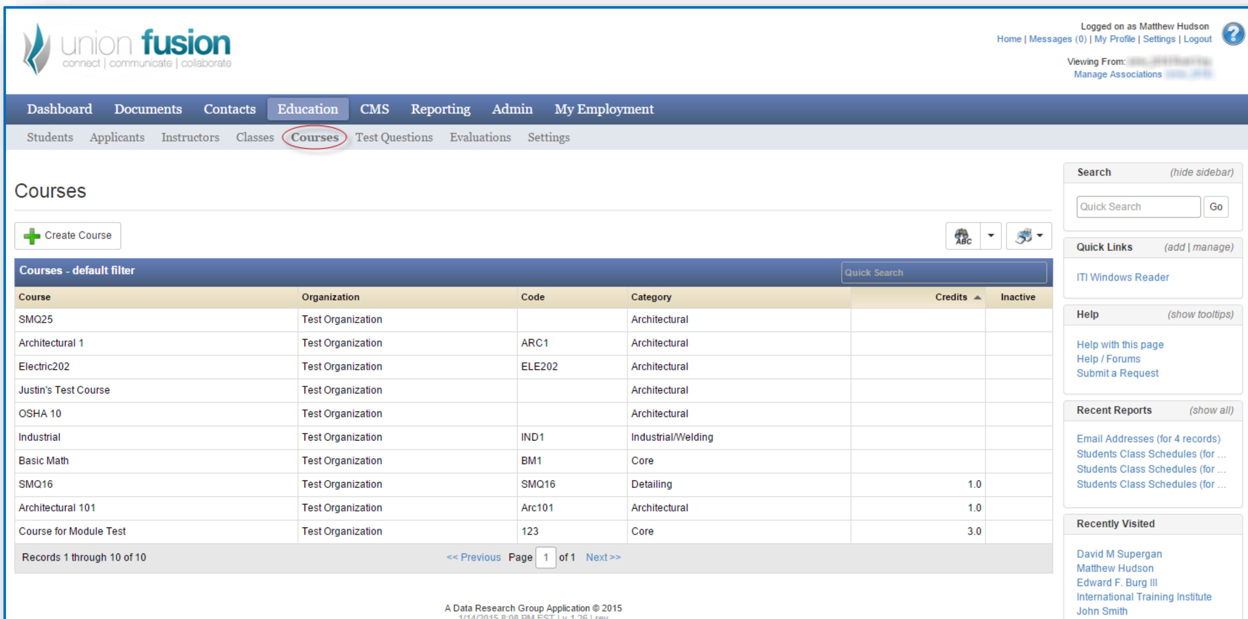
The class grid provides access to all classes, past, present and future. It also provides direct access to a specific class that instructors or administrative staff may need access too. A typical class profile is also provided below and is one of the more important centerpieces within the education module.



Courses

The course object serves as a template for classes. When administrators begin the process of creating classes for a given school period, they should ensure that the parent course already exists and is up-to-date in the system.

During class creation, a parent course will be selected and the class will inherit certain elements from the course during its creation process. By and large a course is similar to a class except that it lacks: time, dates, location and instructors.

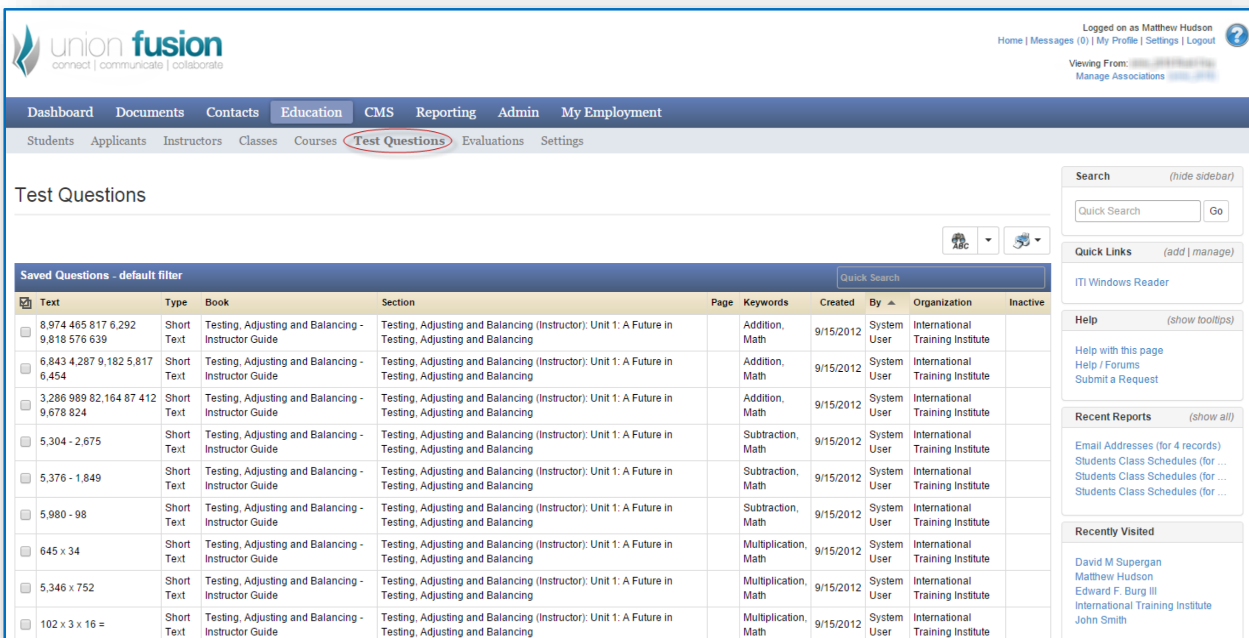


Test Questions

Union Fusion contains its own test management system that allows instructors and staff administrators to both create a question bank (large set of questions) and build tests from that.

UF can also provide statistical analysis of questions to evaluate the success/failure of certain questions being used on tests or quizzes.

There is a great deal of functionality embedded into the ‘Test module’ and formal training time is required for its use and implementation.

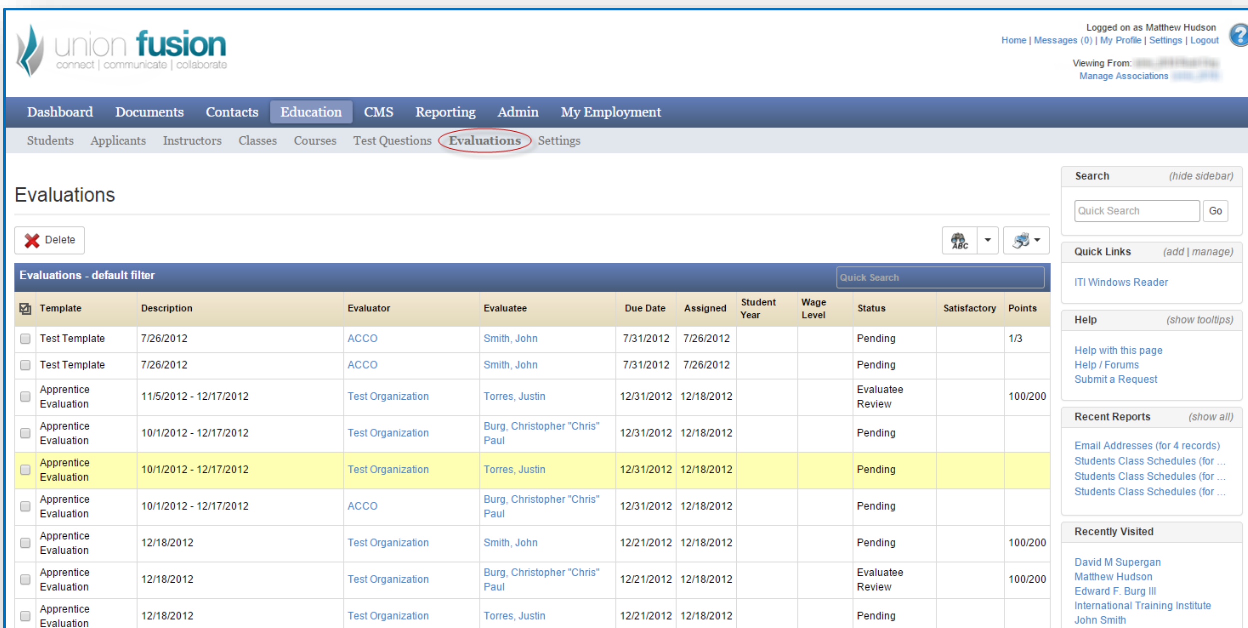


Evaluations

Union Fusion support evaluations that are issued by staff personnel to evaluate any number of 'people-based' roles in the organization. For example, a group of students can each be sent an evaluation on a specific instructor, or the instructor can receive a collection of evaluations to provide feedback on the student's performance.

The system is very flexible and will allow for a strictly electronic capture of evaluations or it will also support the scanning of hard copy evaluations.

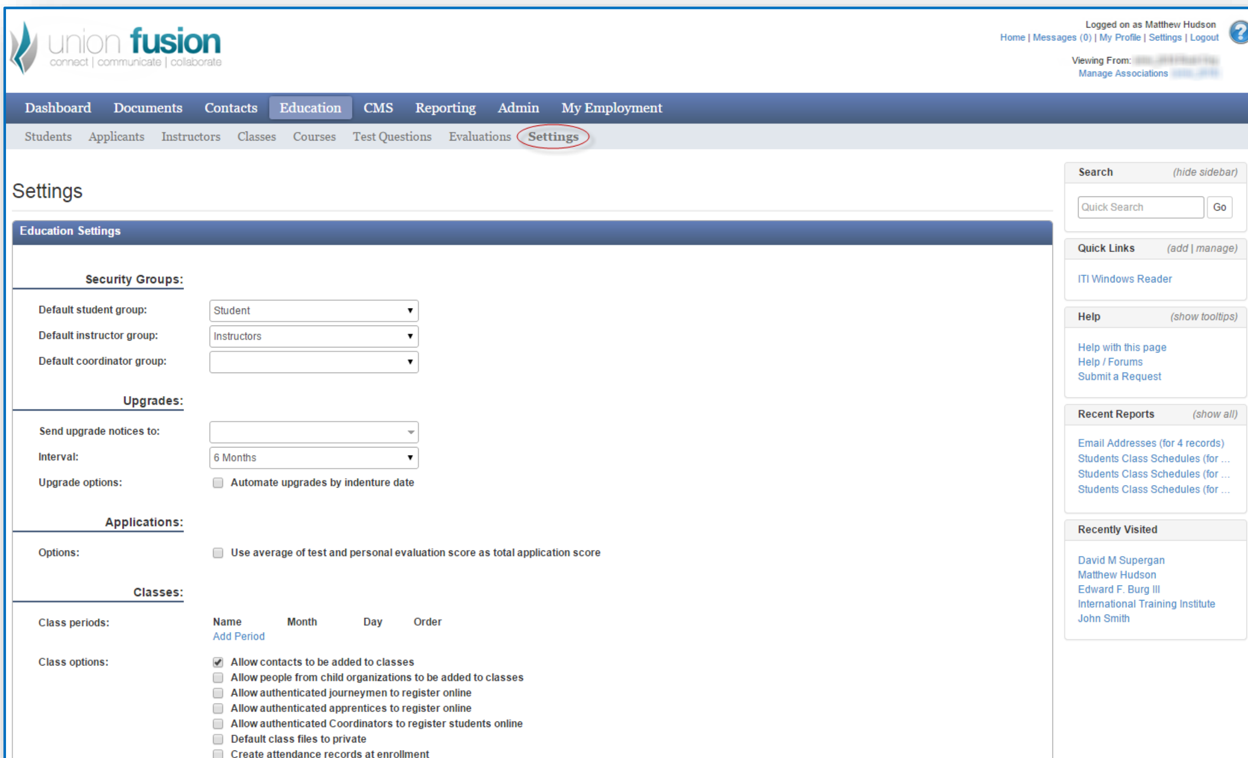
Evaluation templates can be created by instructors or administrative staff for use and reuse across school periods.



Settings

As with other settings menus buried in the framework, this settings menu provides configuration options and in this case, applies specifically to the education module. Similar to the ‘Financials | Settings’, this option has a large number of settings due to the complexity and development maturity of the education piece.

Also, as with other settings menus in other modules, it is recommended that only select admin staff have access to make changes here as it will affect all of education. Training and time to understand the various configuration options is required for an in-depth knowledge of this piece.



Upgrades, Work Reports, Career Paths and other misc.

While they are not exposed through the 2nd level menu architecture that is a part of the education module, the items listed in this section are still available as part of the Union Fusion framework.

Upgrades all staff personnel to move construction trade apprentices up through their levels based on a wide variety of criteria, including but not limited to: work (OJT) hours, school hours, attendance and numerous other properties. The upgrade piece provides a very flexible system that adapts to literally any upgrade scenario JATC's currently support.

Union Fusion also boasts a very powerful OJT hour's collection module that permits students access via mobile devices to record their time on a daily, weekly or monthly basis as may be required. All information captured on OJT happens with a tremendous amount of additional information for statistical analysis in the future.

Career paths are simply a means to formulate a program or defined curriculum for students entering an apprenticeship training center. At any point in time, the student can evaluate the career path (program) requirements and compare that against the courses they have already taken to 'know what's left'.

For JATC's requiring financial integration, the education module is designed to integrate very cleanly with the financial module, such that during class registration, invoices to the students or the companies they work for, can be automatically and easily generated and then managed.

There are a number of other features and functions not discussed here that are part of the education module that can be more readily disclosed in a GoTo Meeting demonstration.

FINANCIALS

The financials modules is a very complex and capable module within the Union Fusion framework. In principle, the system is dual ledger entry system where credits and debits exist on every sort of transaction.

There are numerous facets to the financial module and perhaps the most important in terms of understand is its integration into everything else. Financials integrate with: classes, events, e-store, membership and dues, fees, and book sales. Additionally, the financials can be used to manage outgoing payments related to a number of processes in the system, including but not limited to: refunds, benefit payments, credit payments, pension payments, etc.

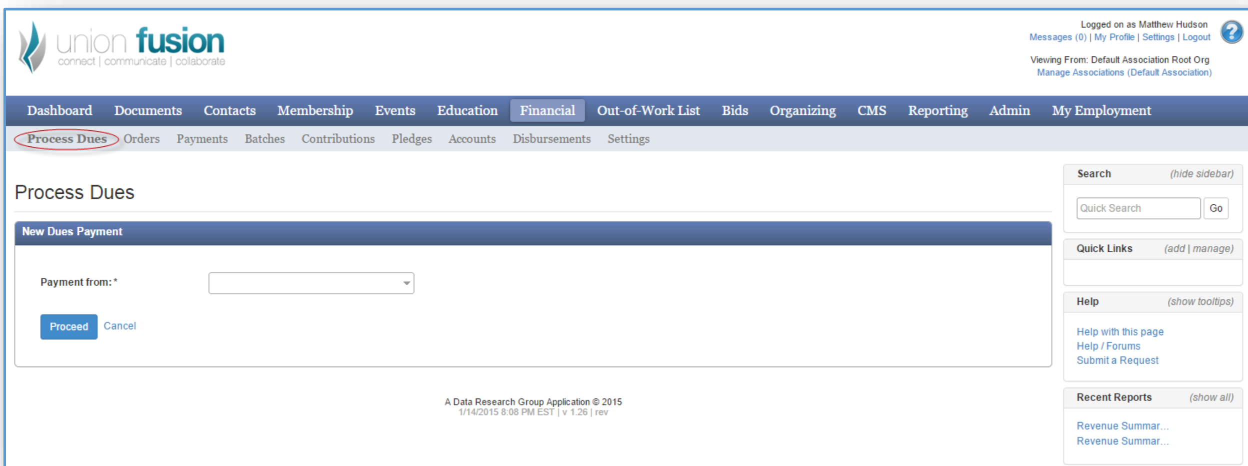
For organizations using the financials module, there is a fair amount of training and integration time that is required setting up the system and configuration values under the settings menu should be protected.

The financial module is also capable of integration with credit card merchants Stripe and Authorize.NET as well as e-Check (ACH) merchant Dwolla.

Process Dues

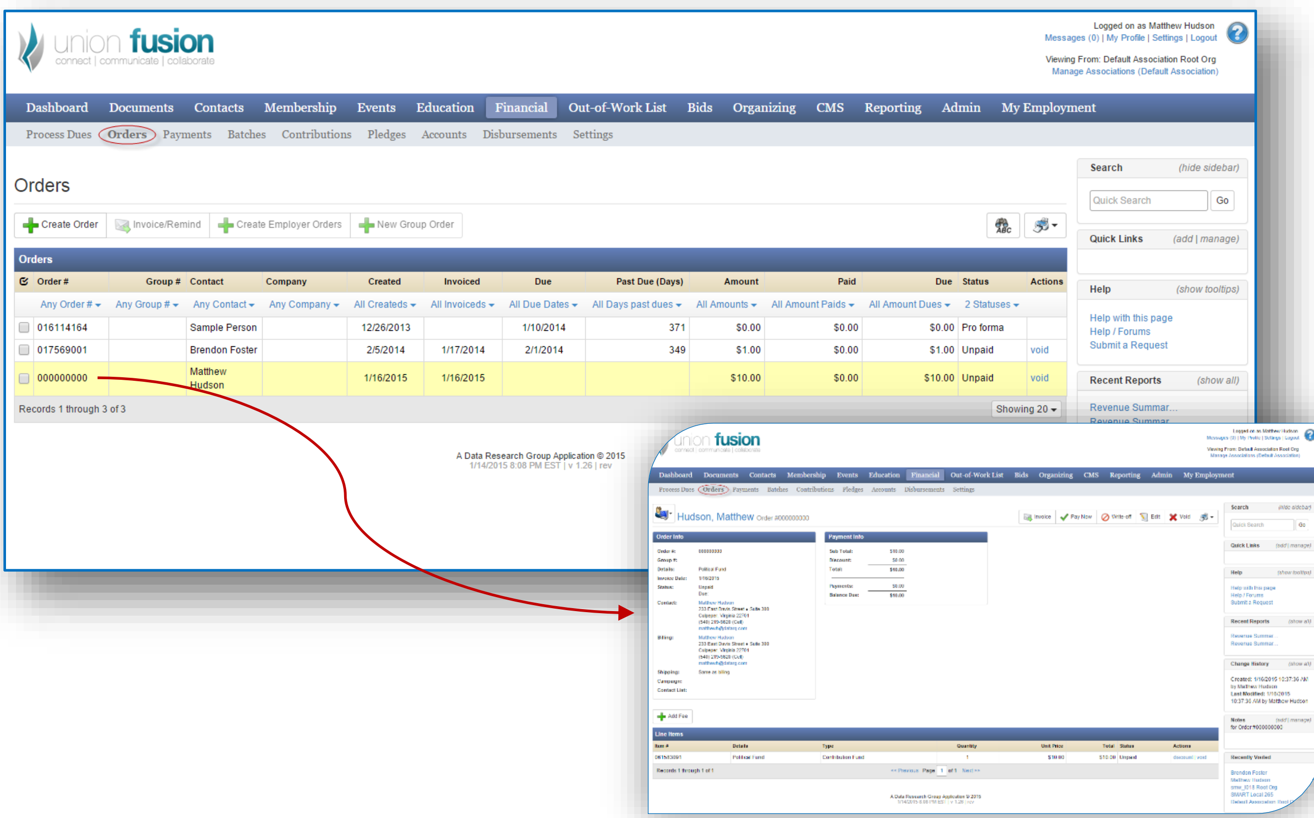
The dues process screen is optimized for union locals that process a good deal of their dues via mail or at the counter. The interface is optimized for dealing with a large number of variations that exist in dues processing at locals throughout the country.

The dues processing screen will allow staff personnel to select multiple periods and to add or remove fees that may apply to a given member transaction. Receipts that result from this process can be either electronic or hard receipts going to the printer. The electronic receipts are actually more secure and can be verified by business agents or other union reps out in the field with a smart phone or mobile device.



Orders

The centerpiece for the financials module is the order. An order represents a time-stamped interaction between the local/JATC/Fund office and the recipient (typically a member, apprentice or pensioner). The order has related details that all local union staff to formally track the event in much the same way that sales in a retail store would occur. Each order has numerous dates and related line items that can be associated with it. Orders can be paid off at the desk by staff members or paid electronically online through the member or contractor portal. Orders can generate invoice-like reports that can be printed to show an amount due when money is still dues against the order, or show payments similar to a receipt when the order has been paid partial or in full.

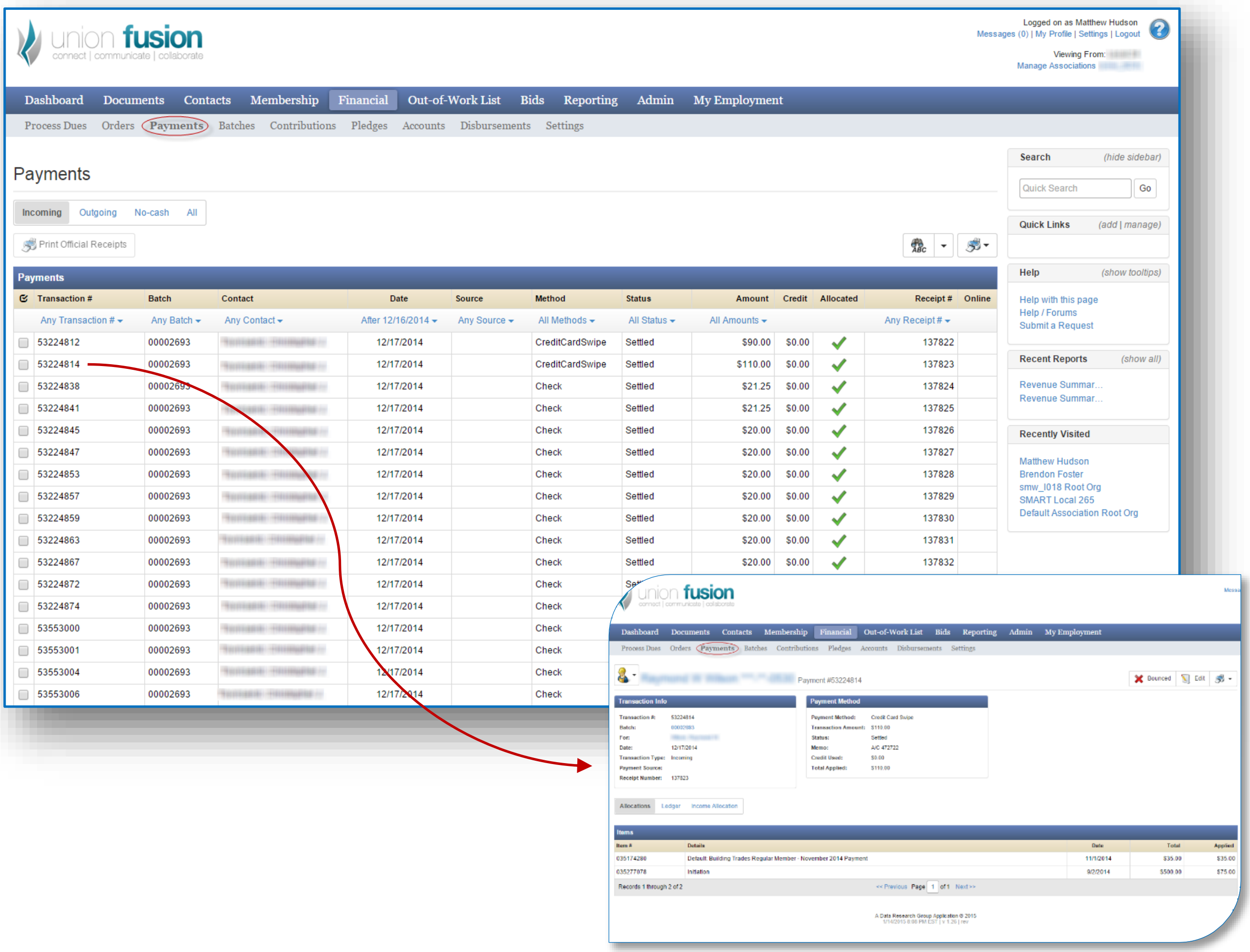


Payments

Payments refer to ‘incoming’ payments from the member, person or contractor to the local union. Payments are also associated with an individual or a company and can be viewed from that perspective as well.

As has been mentioned before, Union Fusion is capable of various payment types: including cash, credit cards, e-Check (ACH) and others. Payments are very flexible in that a single payment can be applied to multiple orders or just a part of one order.

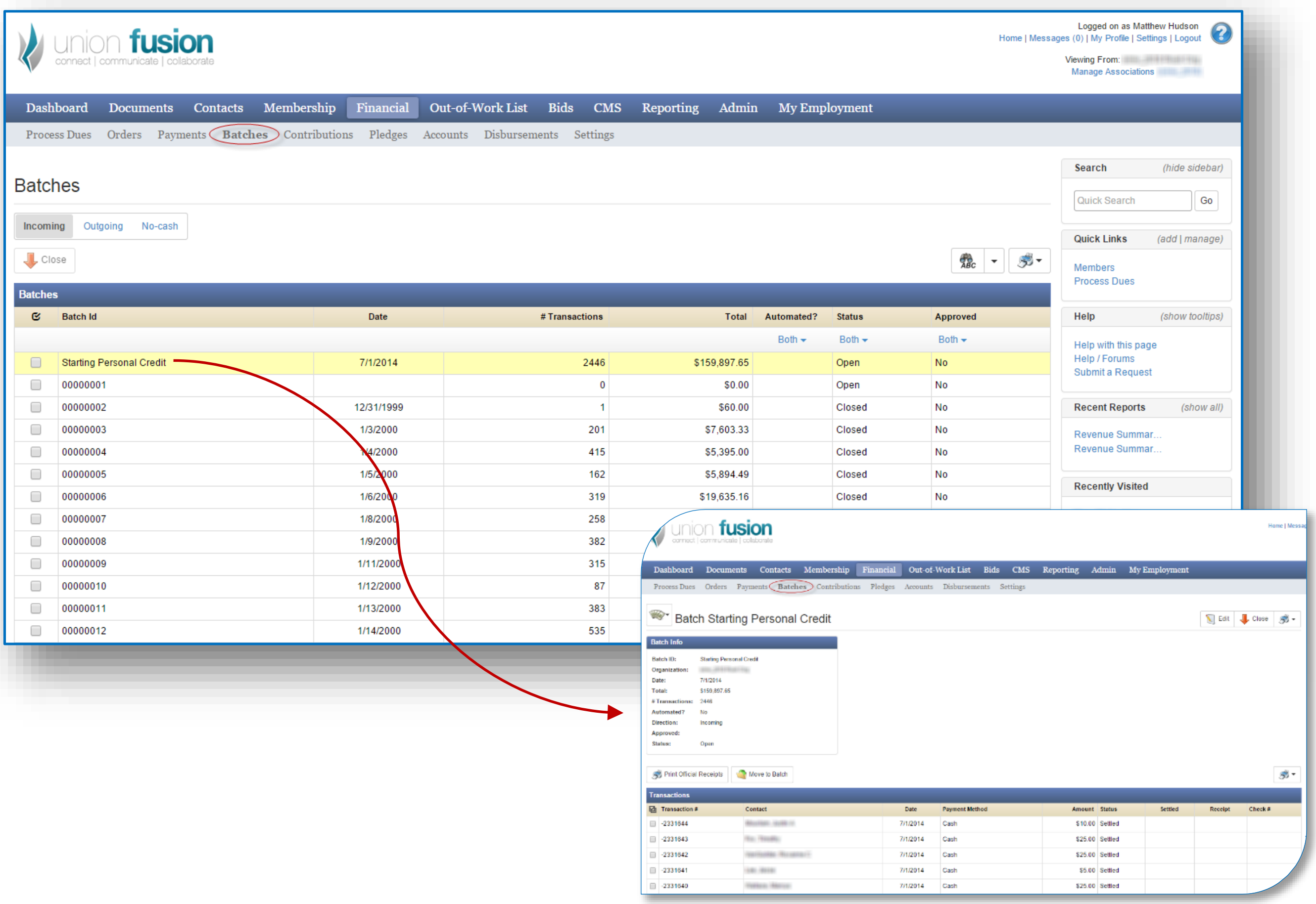
The payments grid can be searched across all fields for all time. Payments are typically searched to resolve or reconcile financial issues that come up in normal operational activities.



Batches

A batch is formal way to capture incoming payment into the local union. For reconciliation and auditing purposes, each batch should represent a collection of payments that went to the bank as a single deposit. It is arbitrary and completely up to the local when it comes to the size and number of transactions in the batch. Some institutions will deposit daily, some weekly and still others, only once per month. In any case, to maximize the use and function of the batch, ensure that each batch represents a single bank deposit.

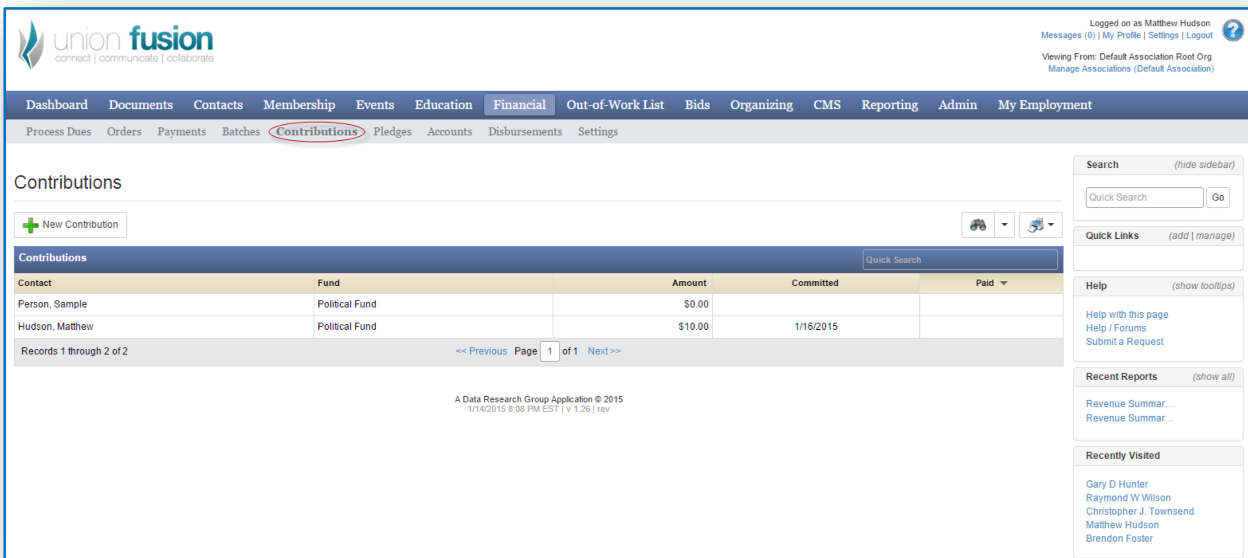
The batch also supports a couple of different view to see how money is moving around on an account basis. Additionally, there are standard reports that should be printed out every time a batch goes to completion and is closed. This paperwork can be stored with the original paperwork from the payments (i.e. Copies of checks and cash that came in the mail or to the counter).



Contributions

Contributions allow local unions or other organizations to receive a gift, donation or contribution for a variety of purposes. When tagged as a contribution, they money and information related to it can be reported on in a different capacity.

Contributions are different from payments in that there is no material order or invoice that exists against them and there are specific tax rules that should be observed when collecting money for these purposes.

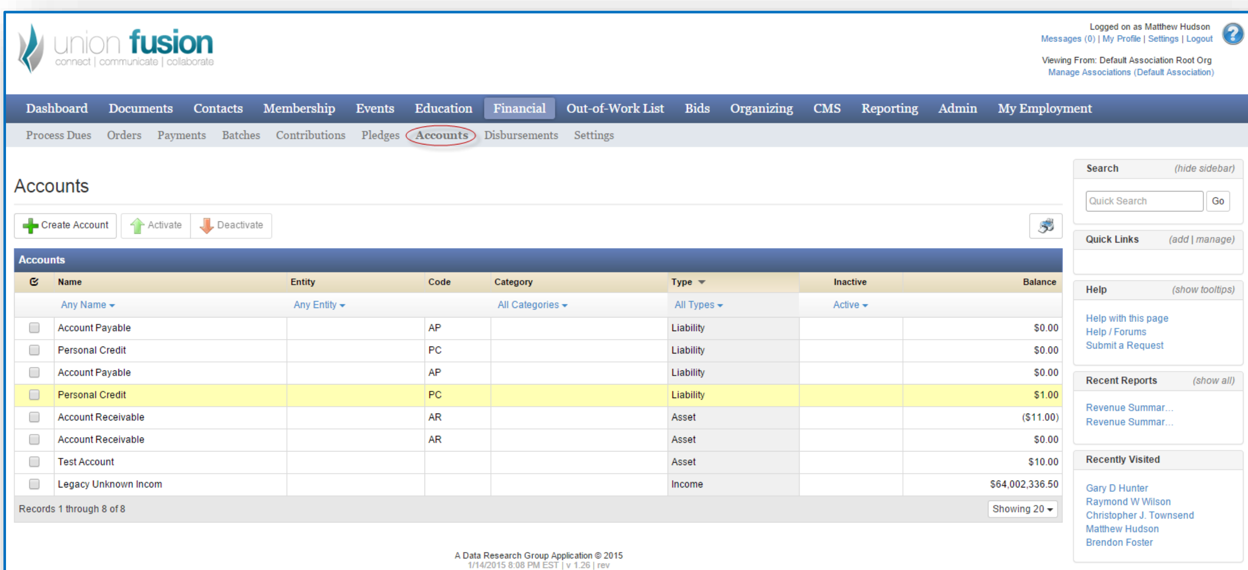


Accounts

Union Fusion supports a number of different account types to support the variety of transaction types that may exist. Some of these account types include: asset, liability, income, etc. These accounts allow for the segmentation of monies that may be received for different purposes.

For example, when money comes in for dues for a specific member for a specific month, a portion of that money is typically retained at the local and a portion of that money is typically sent off to the international or national level organization. This is common practice in both locals and associations who collection membership dues. One payment is made, but that money can be divided up in the background to credit the income account of the local union and also credit the liability account of the national level organization.

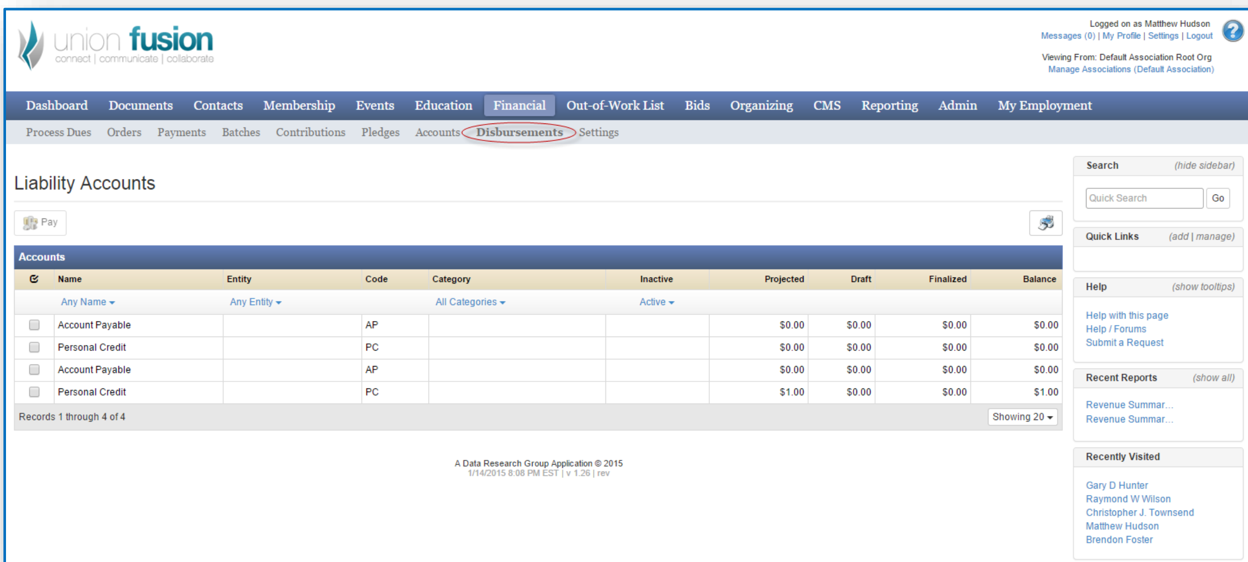
The number of accounts and ways to divide the money on incoming payments are numerous and this model, standard to most accounting systems, provides for a very efficient and easy-to-manage system when it comes to allocating funds.



Disbursements

Disbursements are different from payments in that disbursements represent all outgoing payments from the organization to an entity (either a company or a person). Disbursements can be and are created for a variety of reasons including but not limited to: refunds, credit pay offs, benefit payment, reimbursement payments, etc.

The disbursement system is somewhat guarded in that it requires a dual person approval process before payment can be generated and issued. Like incoming monies, outgoing disbursements are also managed in batches for reference and efficiency purposes.

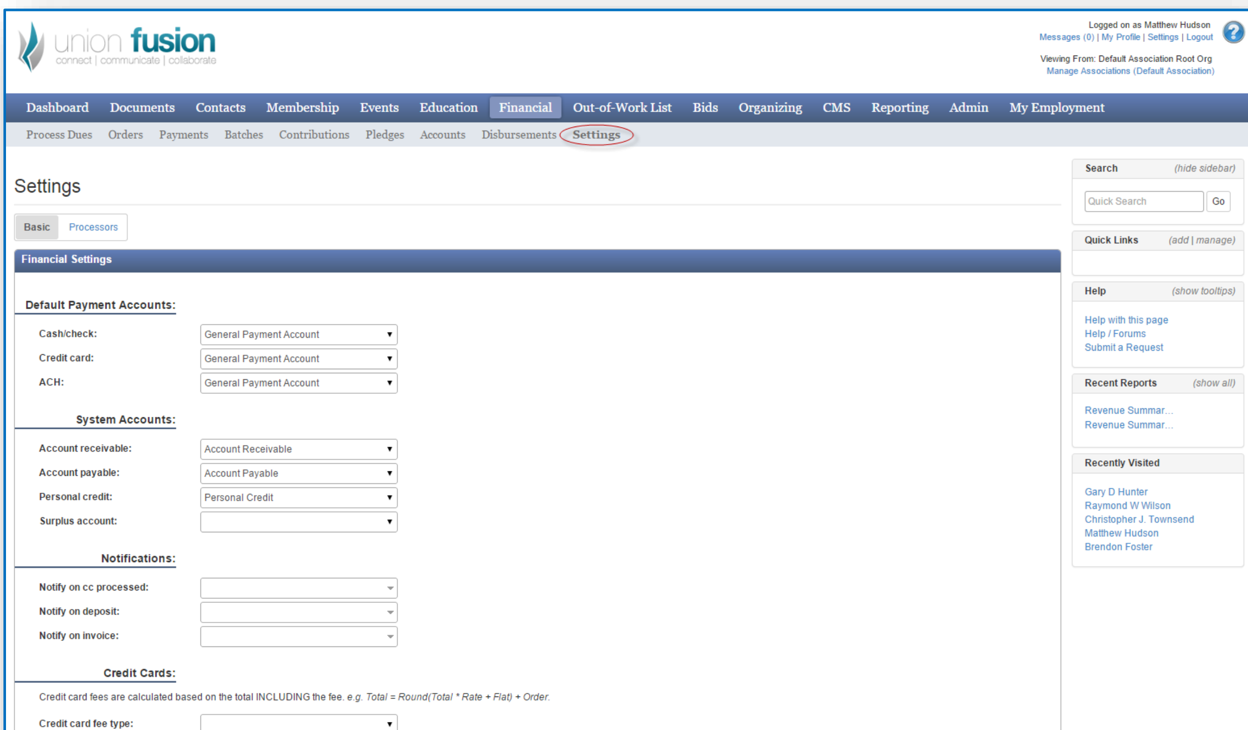


Settings

The settings 2nd level menu under financial is a means of configuring all of the various options related to the financial module. As you can imagine, there are a large number of options due to the large number of ways that financials themselves can be used in an organization.

In addition to standard configuration options, we also capture security keys and logins to connected payment vendors such as Stripe, Authorize.NET and Dwolla. As such, this 'settings' menu under Financials should be locked out except to a select few individuals inside the organization that have permission to view.

This settings menu will require Data Research Group support, instruction and initial setup to use.



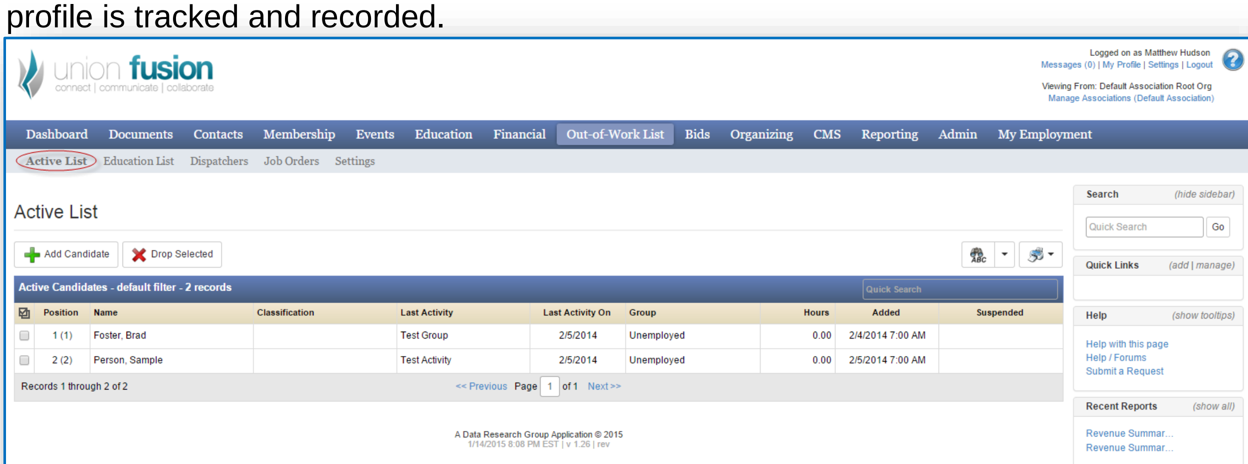
OUT OF WORK LIST

Active List

The out of work list manages individuals in the construction trades who are currently out of work. Different local unions refer to this list in different ways including 'referral hall' and 'hiring hall' as well. The Union Fusion architecture is a very flexible architecture allowing multiple, and simultaneous lists to be managed in this area. This is represented by the 'Active List'.

Different locals again have different rules regarding how and where a person is placed on the list and how long they can stay there. Additionally, even if a member is dispatched to a job, the member can retain his position on the list dependent upon a number of variables or policies associated with the local union and its practices.

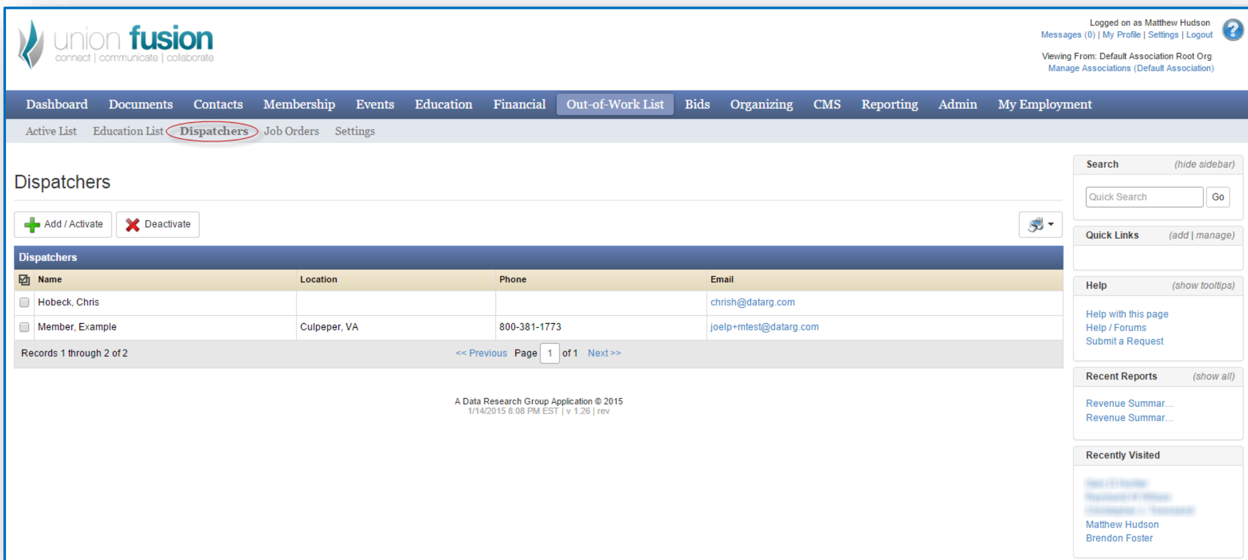
When members are added to the list, they gain an absolute position on the list and a position within their particular group. The use of groups inside the out of work list, provide for a very flexible architecture inside the UF framework. Every member that is added now has a candidate profile that is similar to a resume where skills and specialties can be managed. One very important facet to the candidate profile is the 'Related Activities'. The nature of the out of work list in local unions demand objectivity and transparency. The related activities help out in both regards by provided a managed list against the candidate profile, literally everything that happens with that candidate profile is tracked and recorded.



Dispatchers

The dispatcher's grid simply provides a list of dispatchers that have the ability to record activities against candidate's records as well as dispatch those members to a job. This can happen with or without a job order.

Dispatchers can be added to the system by way of this functions provided on this grid as well.

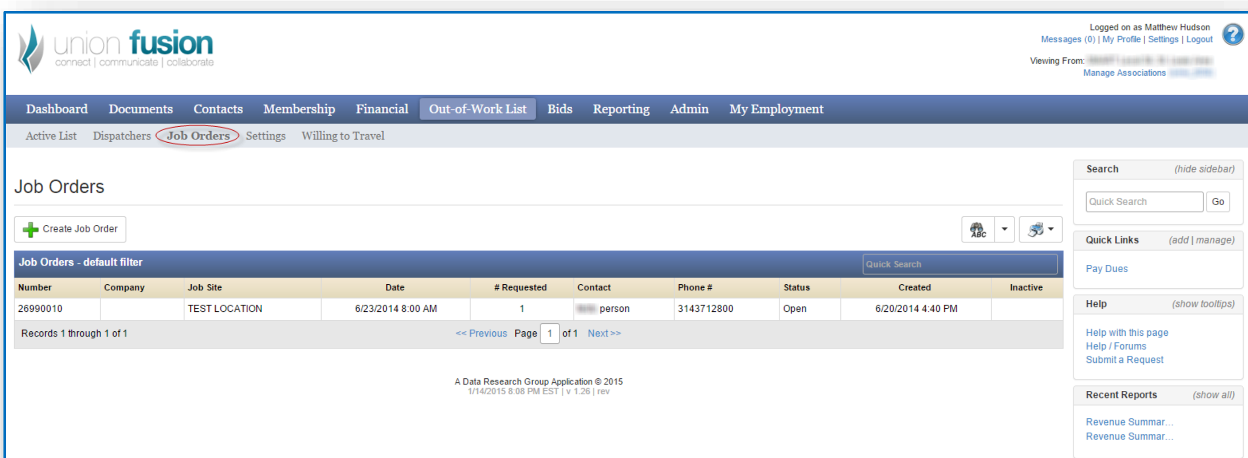


Job Orders

By definition, a job order is request (typically from a contractor) to obtain construction trade workers with specific skills onto a specific job and location. Job Orders can request more than 1 person as long as the position and required skills are the same.

Job Orders can be created by either contractors or business agents and when they are created by contractors, they required business agent approval before moving forward.

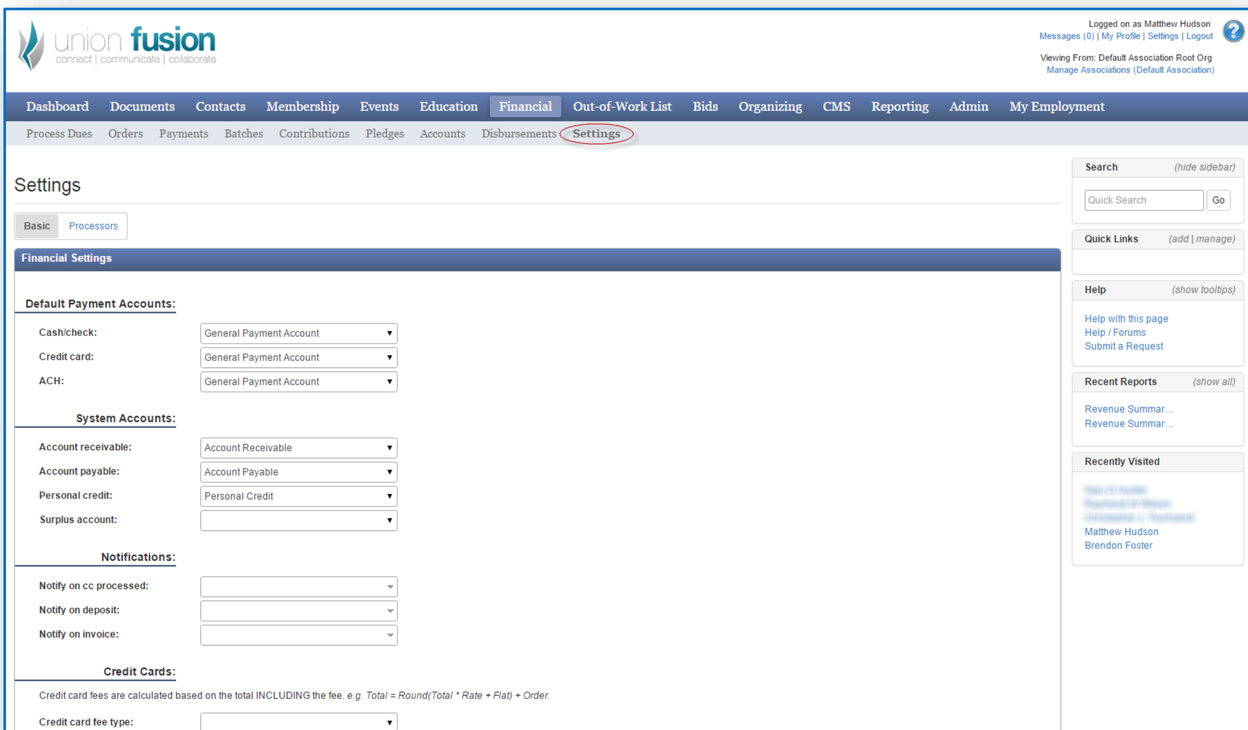
The Job Order also contains a requested set of skills that are optional to the job itself. When the skills are listed out as part of the job order, UF will interrogate the out of work list and then prioritize individuals based upon the number of matching skills and then their order on the list. This filter, once applied will show to the end user automatically when they open up the job order profile. This gives opportunity to the dispatchers or business agents to look over the returned list and choose the candidates that will be initially called and then dispatched.



Settings

There are a large number of configuration settings available to staff personnel for governing the settings associated with the out of work list as well as directing the logic implemented by the job order search mechanism when a job order profile is opened.

In addition to the 'settings' related to the out of work list, there are also, 'Activity Rules' and 'Service Trades' that should be populated in order to correctly ensure all of the pieces of the out of work list are operating as expected in the context of the local union using them. Training, setup and configuration should be implemented by experienced professional in order to correctly implement this module.



ORGANIZING

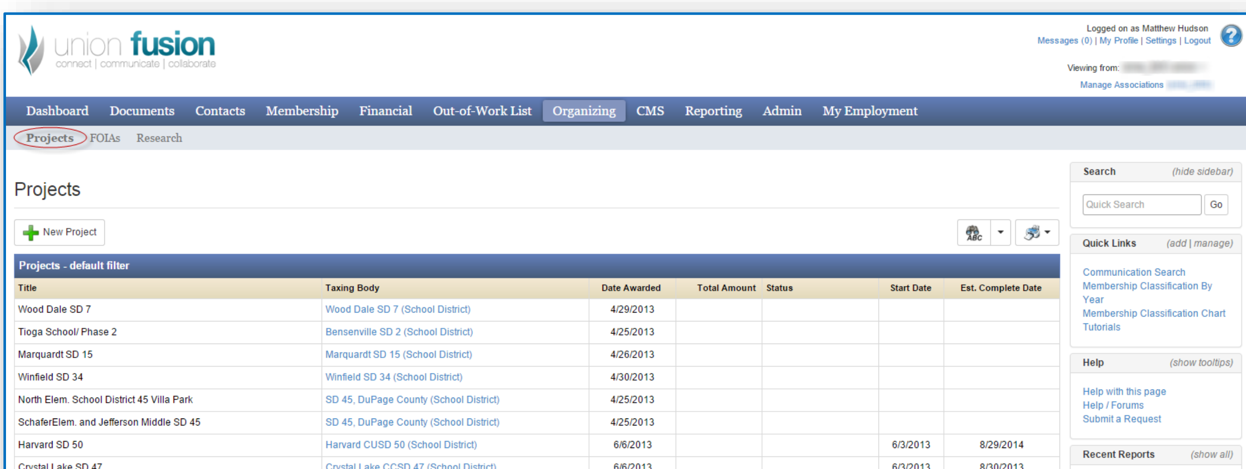
The organizing module is designed to facilitate organizers and business agents to capture information about existing or upcoming projects and to track information on existing jobs.

Additionally, the module can be used to generate and track FOIA (Freedom of Information Act) Requests to government agencies.

Projects / Jobs

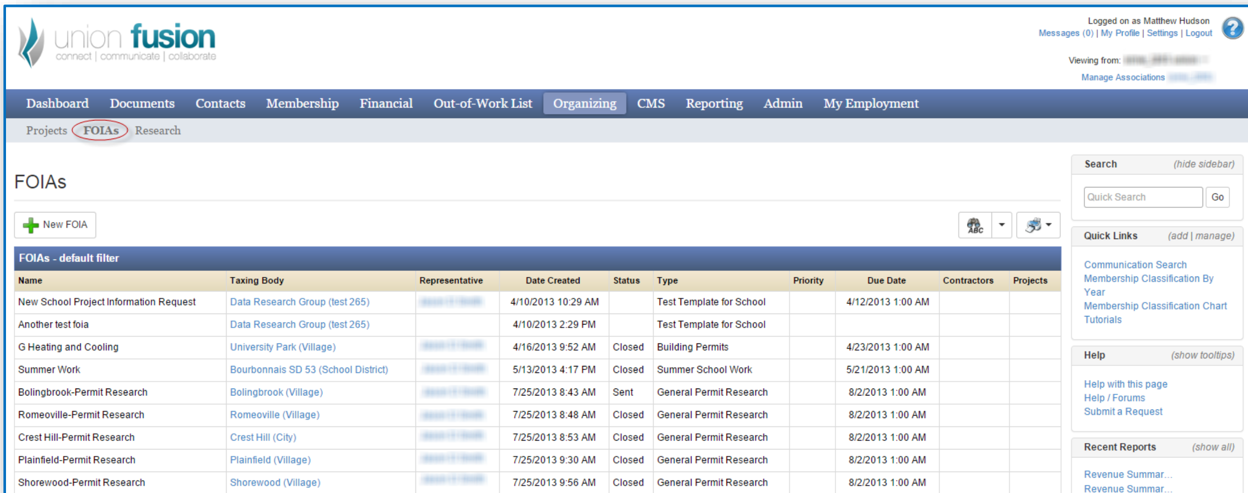
The projects grid provides access to permissioned staff personnel to view existing or upcoming projects in the local area. There are companies that provide information dumps to populate the project grids, but configuration and a subscription are necessary.

Business agents or staff personnel can also populate the grid of projects by manually entering the information into the system. Essentially, a project represents work that is occurring at some designated location. There may be multiple contractors working on the project simultaneously. The industry has adopted the term of ‘job’ to represent a single contractor working at a single project. Union Fusion has the ability to track Jobs as well as the represented personnel that may be working at that job. For each person on the job, UF can also track their daily hours for oversight depending on the needs of the local union.



FOIAs

FOIA stands for Freedom of Information Act. The FOIA 2nd level menu allows agents and organizers to create their own FOIA templates and FOIA to submit to government agencies.

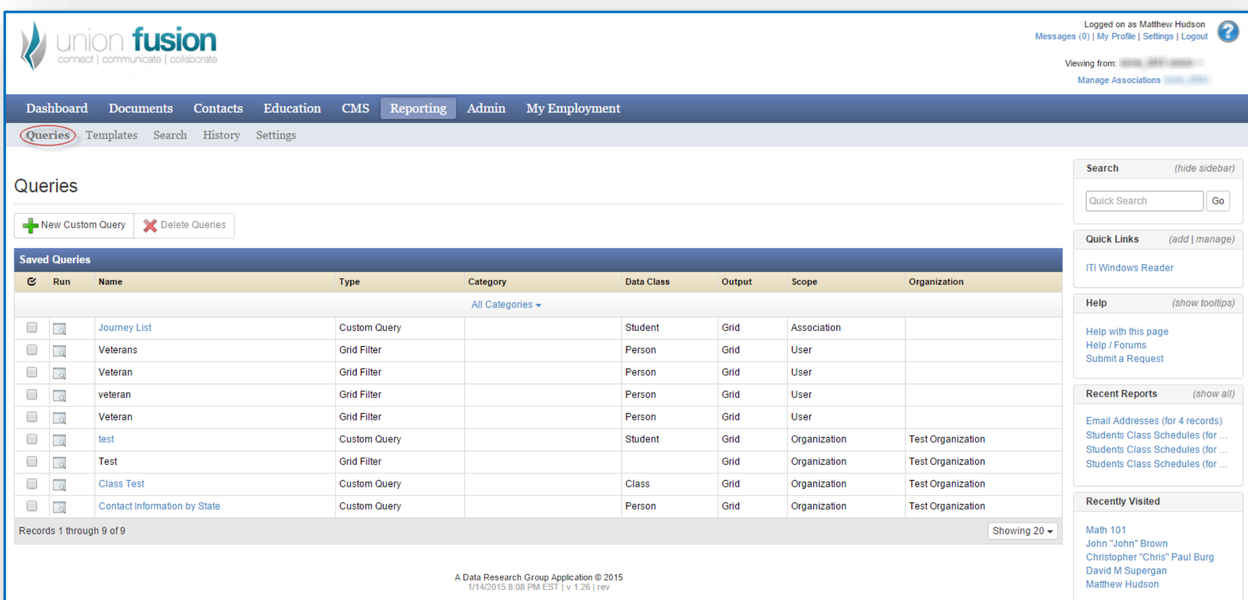


REPORTING

There are numerous facets to the reporting module in Union Fusion. The reporting module was designed with the sole purpose of providing a single location to generate custom queries, reports and charts against all of the data in the system.

The module also has the capacity to integrate these custom queries and reports into existing grids through the Union Fusion architecture. For example, you can create a custom query in the reporting module on the 'Members' data class. When it is created there, it will show up on the member's grid under membership as a saved filter that staff personnel can run.

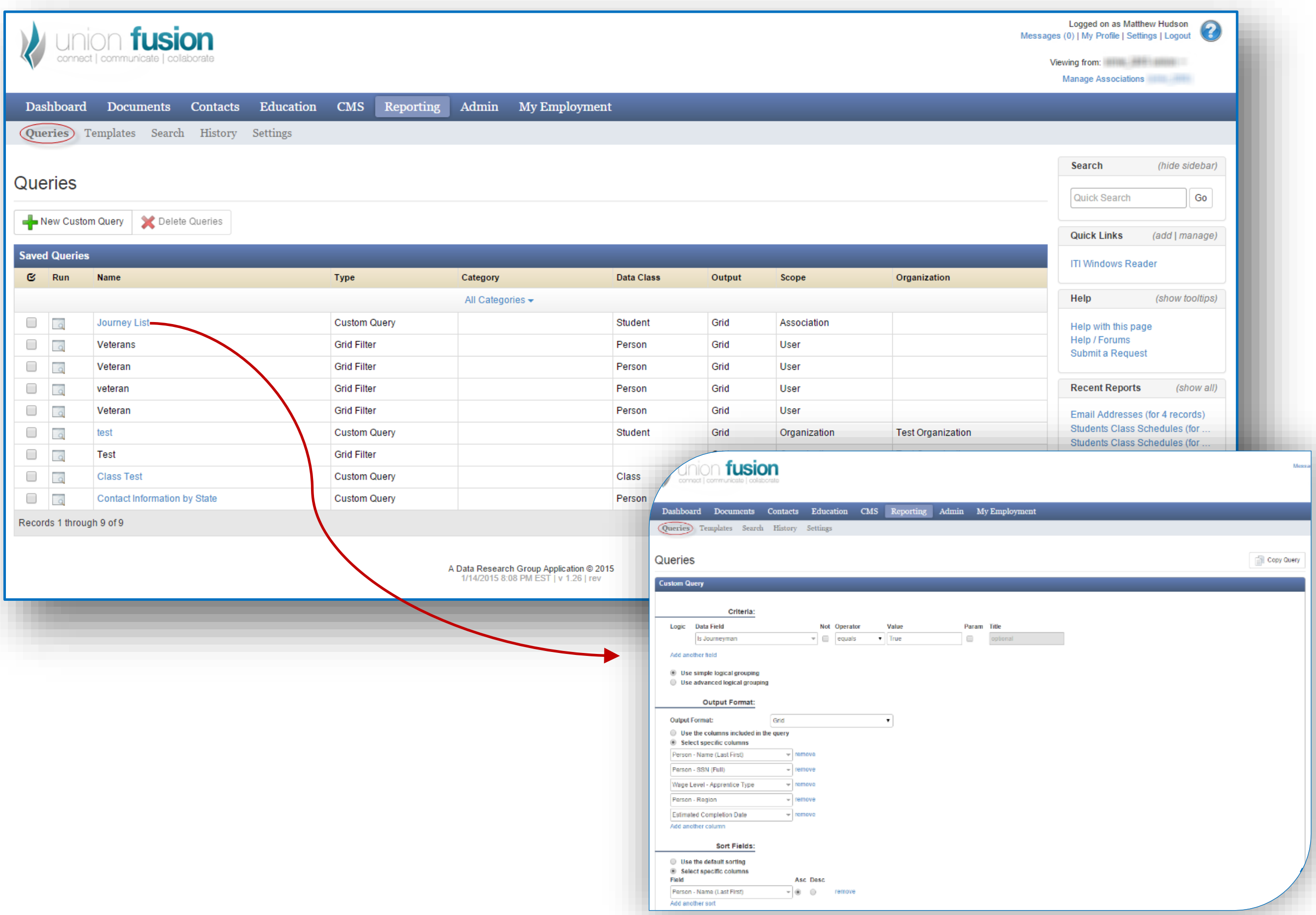
One really convenient concept that was implemented for the customer queries and templates is the ability for end users to share them to the entire organization (if they have holistic value).



Queries

The query object in union fusion allows members to create simple or complex queries against established data classes in the Union Fusion architecture. A data class represents a collection of tables in some subject area in the database… for example: members, orders or students. Each one of these classes is represented by multiple tables storing data. The data classes themselves are defined by developers, but can be changed or added to easily in a single iteration.

The custom aspect of queries allows power users to implement ‘and’ and ‘or’ clauses into their query, select fields, a comparison operator and a value. The queries themselves can get quite complex and from time to time, do require expert help to resolve filtering issues.

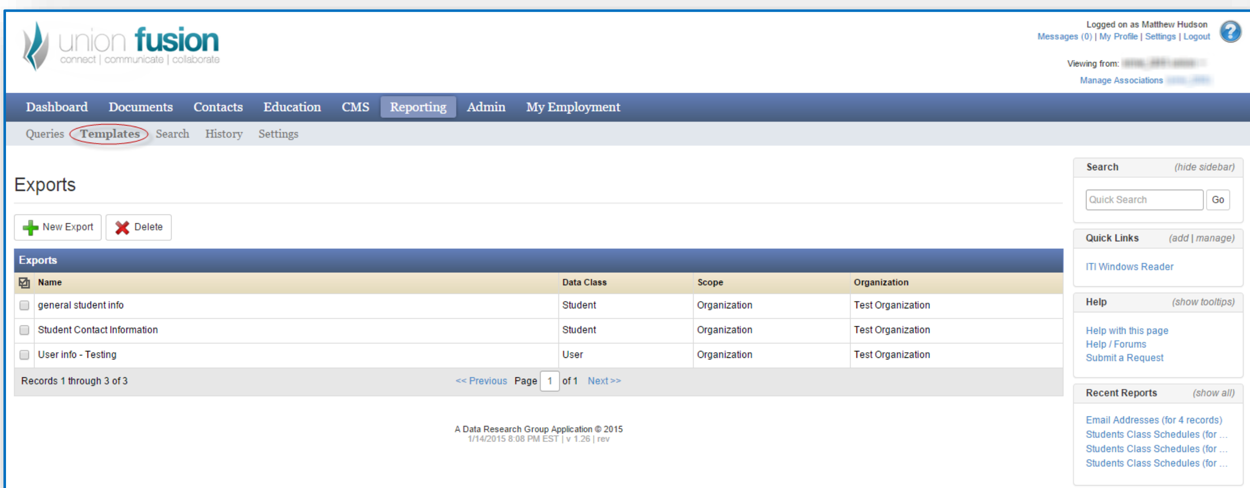


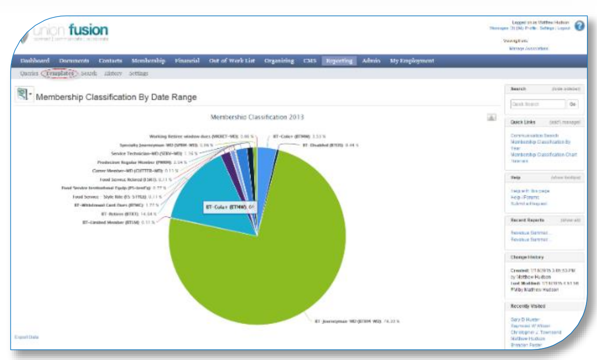
Templates

Templates are represented by standard tabular exports to excel or to the built in data grids throughout the architecture. Tabular exports are essentially row and column output where no layout control is exercised.

In addition to tabular reports, Union Fusion implements a custom report builder through Active Reports, the Reporting tool used by developers for system level reports throughout the solution. The most common output delivery type for these reports are PDF (portable document format), but other options do exist.

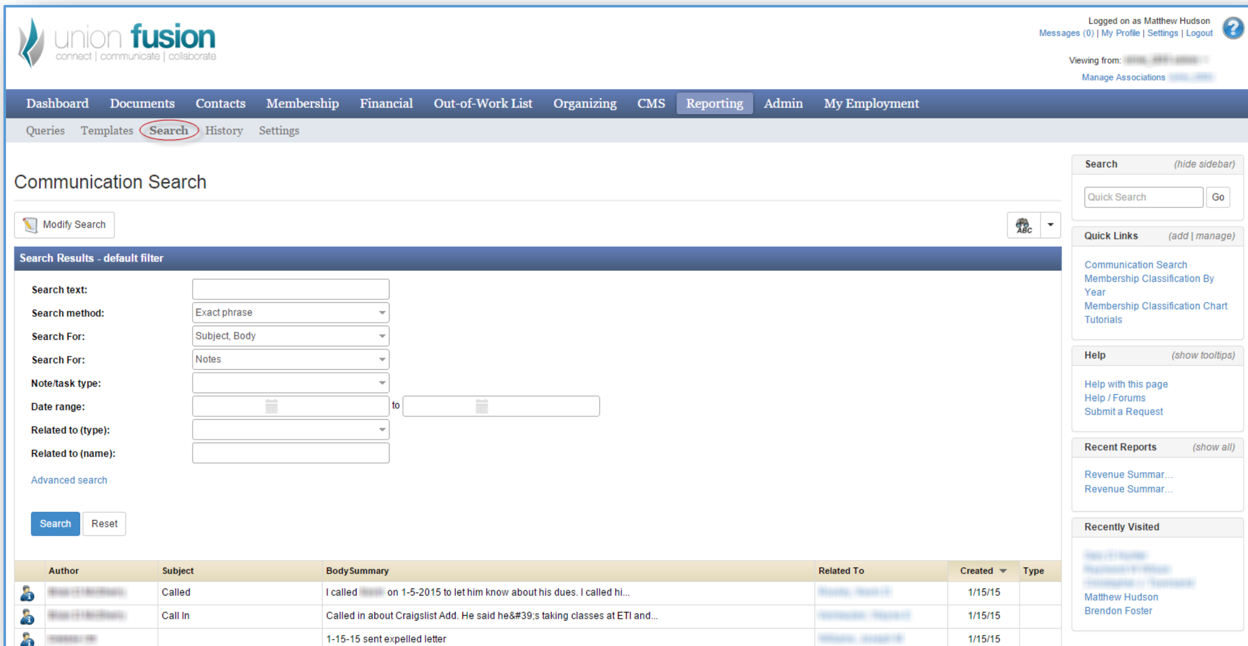
Finally, end users can choose to have their information exported out to a chart object. The charting object in Union Fusion is HighCharts Javascript engine for ASP.NET.





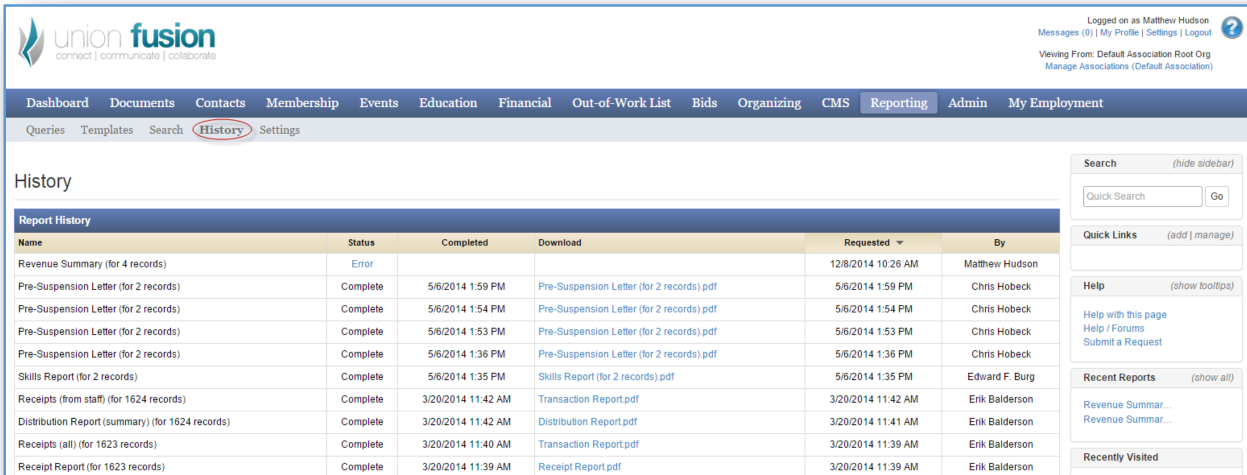
Search

Search provides access to a custom search specific to communication related data in the system. Things like email or messages or texts can be easily found from among the hundreds of thousands that exist inside a specific instance.



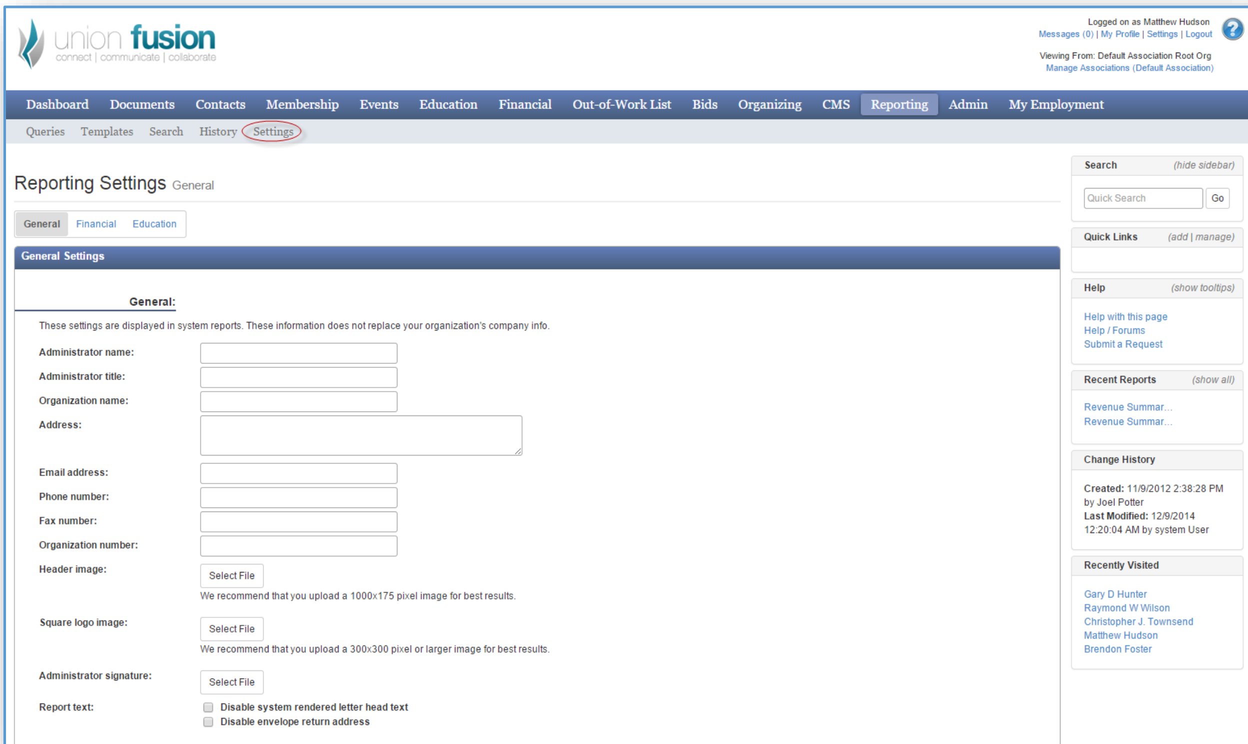
History

The history 2nd level menu provides access to reports specifically run by the user who is currently logged in. These are presented in descending order and provide access to pull an older report that had been run.



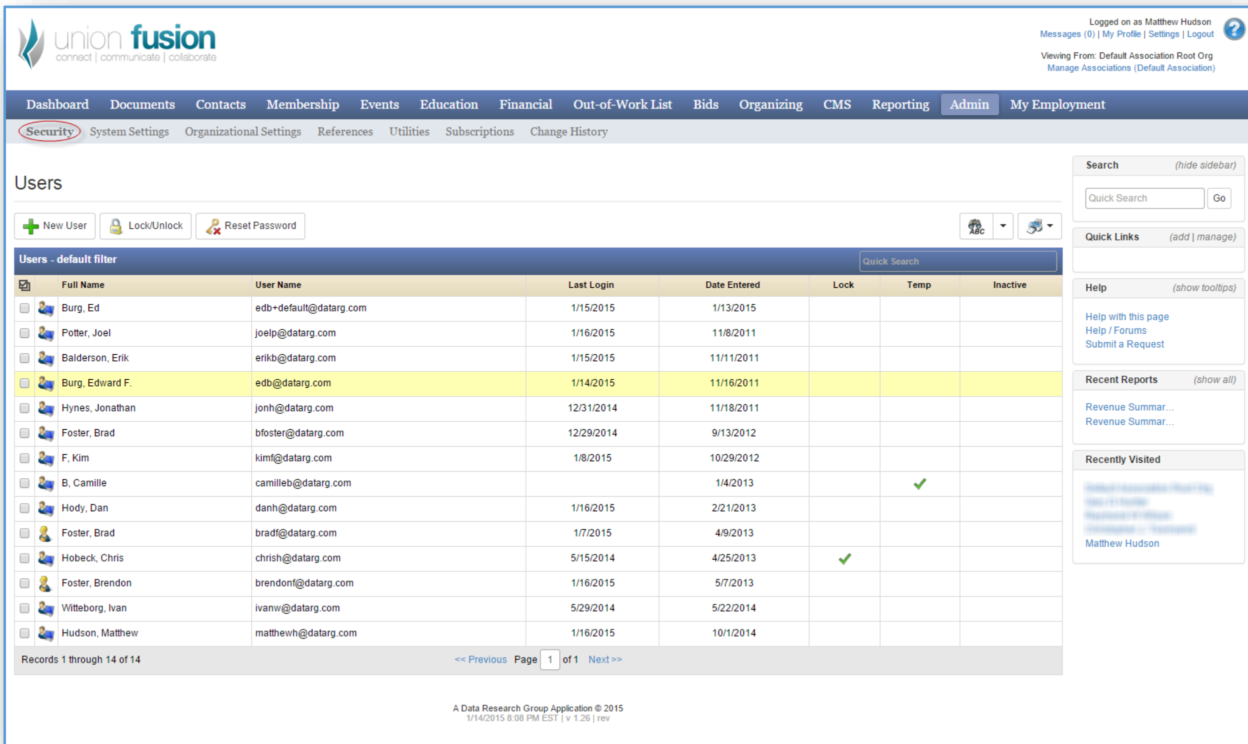
Settings

The settings tab is a configuration tab specific to the reporting module in Union Fusion. All of the settings found in this menu provide user level configuration to report output or organization name and address that may come out standard on many reports.



ADMIN

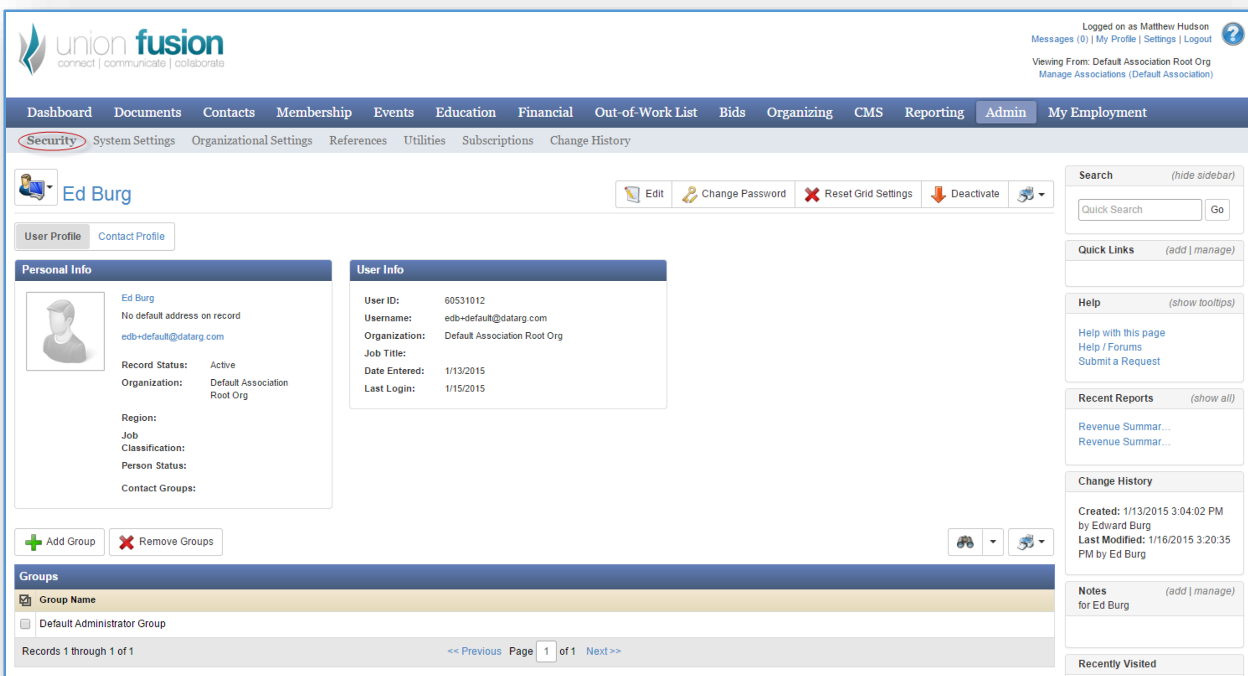
The administrative module, as its name implies, provides a key location for staff personnel to administer the Union Fusion solution to their organization. The module itself should only be available to key staff as the solution is fairly exposed to those personnel that have access.



Security

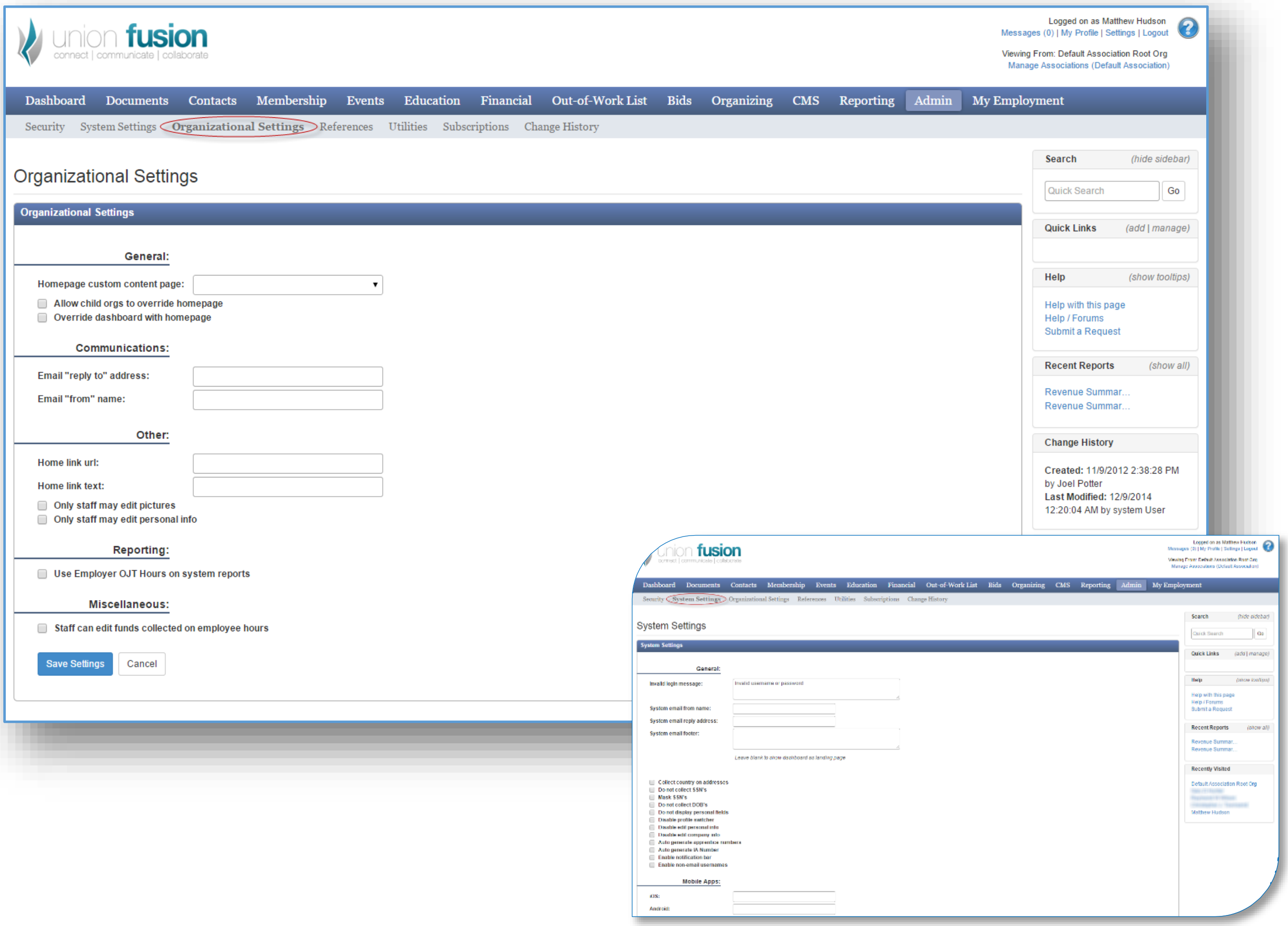
The security architecture is made up of 3 important parts to understand the security paradigm in Union Fusion: Users, Groups, and Permissions. For the most part we have have adopted a model similar to Microsoft based security system where users can belong to groups and both users and groups can have related permissions. While users can have their own permissions, it is highly recommend to place users in groups and only assign permissions to groups. This will minimize the overall management of security in the system.

The permissions model will inherit from parent objects unless a specific function or 2nd level menu is intentionally denied. The permissions themselves work from standard database activities including: create, read, update and delete to nearly all of the objects in the framework. The system is very granular in granting permissions and therefore permissions can be highly customized to select groups.



System & Organizational Settings

At a high level these options are simply configuration settings designed to apply to the framework as a whole. As with other 'settings' menus throughout the system, access should be guarded. Sample options in these sections include, company name and address, default response settings on automated emails, industry codes and terminology and much more.



References

The references grid provides organizational level access to control the values that appear in drop down boxes across the entire system framework. These are typically established when systems are initially set up and configured. As with other configuration modules or menus, guidance by experienced personnel is necessary in order to achieve good results.