



## Exor Enquiry Manager

Dynamic Information Management for Highway Agencies and Customers

Exor Enquiry Manager helps owner-operators manage the relationship between on-going asset management and customers. It allows organisations to efficiently manage and respond to communications from their customers and the general public.

### Provides Comprehensive Management of Enquiries

Exor Enquiry Manager allows for the input and management of all enquiries received by an organisation. As an open solution it can integrate with corporate CRM systems or operate independently via a web-based user interface. Integration with other Exor modules allows creation and display of enquiries via a map; the association of documents such as letters, photographs, and drawings; and the generation of defects based on the enquiry information.

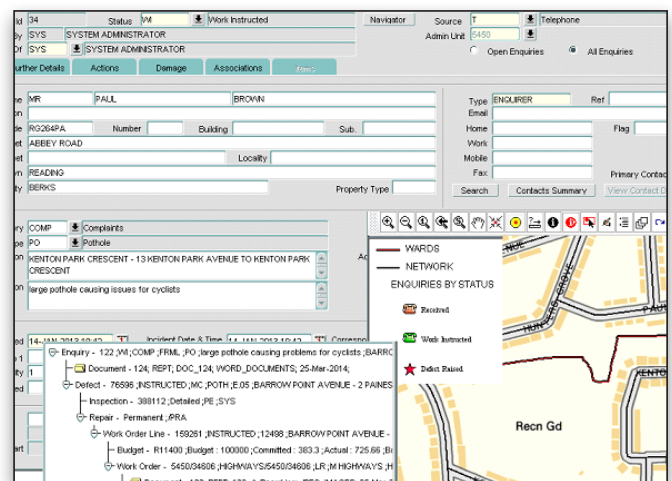
As a defect passes through its lifecycle, from creation to work order completion, the status of the enquiry is automatically updated to reflect these changes. This improves workflow and provides a complete solution by bridging the gap between traditional CRM and engineering functions. Emails can be automatically generated to notify system users and customers at any stage of the enquiry lifecycle as required. Standard acknowledgement letters can be produced using Microsoft Word templates.

### Enables Map-based Enquiry Management

Enquiries can be recorded against a network location, an asset, or independently. When implemented with Exor's web mapping option, new enquiries can be raised and maintained directly from a map. This provides a simple-to-use spatial interface allowing more accurate location of issues, leading to better information gathering and dissemination to interested parties.

Exor Enquiry Manager can use nationally published gazetteers to check postal addresses when entering new enquiries. This speeds up data entry and minimises typographical errors.

The Worktray tool provides a user-customised display with associated map location and documents. Enquiries can be summarised and formatted to meet individual requirements using filter, sort, aggregate, control break, charting, and other tools. This allows users to easily view and maintain outstanding enquiries.



*Enquiries screen shows summary of all operations related to enquiry.*

### Maintains Complete Historical Records

The software includes full historical tracking and auditing facilities. Enquiries move through a series of status changes or actions, each of which is date-stamped and assigned to the relevant person or organisation. The status history of an enquiry can be viewed at any time to resolve questions.

Exor Enquiry Manager includes a comprehensive standard management reporting suite including individual performance indicator reports and enquiries by road or street name. It also includes a user-friendly interface for ad-hoc queries and report generation.

## System Requirements

### Application Server Specification

As recommended by Oracle for Application Server

### Operating System

Windows Server

### Database Server Specification

As recommended by Oracle for Database Server

### Operating System

Windows Server, Unix

Find out about Bentley at: [www.bentley.com](http://www.bentley.com)

### Contact Bentley

1-800-BENTLEY (1-800-236-8539)  
Outside the US +1 610-458-5000

### Global Office Listings

[www.bentley.com/contact](http://www.bentley.com/contact)

# Exor Enquiry Manager At-A-Glance

## Enquiry Management

- Create enquiries
- Update enquiry details
- Update enquiry location
- Analyse enquiry clusters
- Automatic enquiry redirection and prioritisation based on location and category/class/type
- Multiple enquiry contacts of different categories (e.g., solicitor, claimant, staff)
- Hierarchical display of all associated enquiry data

## Map Interface

- Comprehensive search facility
- User-defined thematic map layers
- Accurate location details

## Open Solution Using Exor Enquiry Manager API

- Foundation for public-facing web portal (client defined)
- Integration with corporate CRM systems
- Standard user work tray
- Customised user work tray

## Security

- Role-based user access control
- Departmental/geographical area based security
- Link enquiries to organisations or individuals

## User-definable Work Practices

- Claims management
- Manage and record multiple customer service requests (e.g., requests for dropped kerbs, disabled parking bays)
- Generate standard actions based on specified criteria (e.g., response letter, customer call back, site visit)

## TMA Register

- Facilitates the creation of Traffic Management Act (TMA) activities for skips and scaffolding permits/licences

## Dates

- Automatic target date generation
- Automatic complete date population
- Incident, correspondence, and acknowledgement date validation

## Flexible Metadata Maintenance

- Multiple enquiry sources
- Multiple enquiry status codes
- Enquiry category, type, and class hierarchy
- Date intervals
- Enquiry priorities
- Standard action priorities
- Standard text definition for frequently used text
- Maintain standard costs for equipment and more
- Link to standard contract items
- Standard metadata set for rapid deployment

## Fully Configurable System and User Options

- Default values for key fields
- Matching based on enquiry type to reduce data duplication
- Claims management customisation using role-based access and additional claim related data fields
- Matching for contact details reduces duplication of data
- Address and postal code searching
- Enquiry redirection rule set
- Automatic enquiry completion rule
- Defect creation rule set

## Auditing

- Standard enquiry history
- User defined auditing including configurable business rules that define precisely what and when data is audited

## Reporting

- Standard product reports
- Create reports and dashboards using Exor Information Manager
- Compatible with industry standard reporting tools

## System Integration

Exor Enquiry Manager integrates fully with the following Exor products:

- Exor Web Mapping Services and Exor Spatial Manager for enabling management of enquiries using a map interface
- Exor Asset Manager for recording enquiries against assets

- Exor Maintenance Manager to support the customer enquiry by tracking the lifecycle of maintenance activities.
- Exor Document Manager to allow the association of multiple document types against enquiries
- Exor TMA Manager to facilitate the creation of TMA activities when processing an enquiry
- Exor Alert Manager for automatic email generation for new and updated enquiries using conditional- and date-based queries
- Exor Audit Manager for flexible recording of enquiry updates with user ID and date/time stamp
- Exor Information Manager to provide user work trays, flexible dashboard monitoring, and reports

## Bentley MANAGEservices

- Bentley can provision, manage, monitor, and support its industry-leading software solutions in a robust cloud services environment.
- Best-in-class cloud services infrastructure with 24/7 monitoring and management
  - Service quality assured by predefined key performance indicators and service level agreements
  - Application management and optimization for mission-critical performance
  - Certified engineers and technicians include managed services experts with an extensive track record of providing end-to-end solutions
  - Secure storage that is flexible yet guarantees data integrity. Comprehensive back-up procedures and data retention policies and regular restores ensure that all data is recoverable
  - Managed firewalls protect networks and applications allowing authorized access, but preventing unwanted intruders
  - Load balancers provide secure access to multiple dedicated servers, ensuring that any demand can be met
  - Proven disaster recovery and business continuity plans are rehearsed annually