



# Getting Started with AWARDS

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## AWARDS Instruction Sheet for Agency Implementation Teams

When an AWARDS system is first set up, several key start-up procedures must be completed, as must some initial data entry. These tasks are broken down into groups based on the users who must complete them:

- **AWARDS Implementation Team**  
Members of the AWARDS implementation team begin the start-up process by entering the key staff (typically the executive director, deputy director, QA staff, and program supervisors) into the AWARDS system, identifying them as AWARDS users, and granting them the authority necessary to do their jobs. The implementation team also enters residence units/bed information for each agency program.
- **Program Directors/Supervisors**  
Program directors/supervisors complete the start-up process by preparing the AWARDS system for use by their staff. This includes entering their staff into the AWARDS system, identifying them as AWARDS users, and granting them the authority necessary to do their jobs.
- **Agency/Program Staff**  
Once the agency's AWARDS implementation team and program directors/supervisors have completed the basic start-up procedures, agency/program staff can begin to populate the AWARDS database by completing some initial data entry. This process involves entering consumer referral records into AWARDS and admitting those consumers into the appropriate agency programs. Once a consumer has been admitted, a wide range of AWARDS features can be used to maintain consumer records and report on program residents.

This document is intended as a guide for members of the AWARDS Implementation Team as they get started with AWARDS. It explains each of the required start-up procedures in detail, including the following:

### 1. Entering Key Agency Staff Into AWARDS

Each key staff member at the agency (typically the executive director, deputy director, QA staff, and program supervisors) must be entered into the AWARDS system by the AWARDS implementation team. During this process, the following steps must be completed:

- A. **Entering a Staff Information Record** - A staff information record is entered for each employee before he or she can become an AWARDS user. Staff information records include payroll group status history, agency, job title, personal, demographic, supervisor, and workschedule information.
- B. **Creating an AWARDS Login** - An AWARDS login is created for the employee after he or she has a staff information record. A login is comprised of a login ID and password that are used by the employee to access the AWARDS application, as well as a user group which determines which modules and features are available to each user, as well as which AWARDS permissions are assigned to the users by default.
- C. **Assigning a Program Director/Deputy Director** - If an employee is the director or deputy director of an agency program, he or she must be assigned as such in the AWARDS system.
- D. **Assigning Permissions** - After the employee's AWARDS login is created, he or she is assigned permissions *in addition to* those granted by default for his or her user group.

These permissions control the level of access within each available module so that the user can see and work with only information for which he or she has the proper authorization.

- E. **Finishing Up** - To finish up the process of creating an AWARDS user, the employee's login is tested and his or her level of access is verified as being correct. The employee and his or her supervisor are then given the necessary login information.

**IMPORTANT!** Each employee's supervisor must already have been entered into the system prior to his or her own entry; therefore, when entering agency staff info AWARDS begin at the top of the organizational structure and work your way down through the levels of staff.

## 2. Entering Residence Units/Beds Information

Information must be entered for each residence unit/bed at each agency program. This information includes: address, onset date, gender the unit/bed is available to, and whether it is open to a smoker or non-smoker. Entering residence units/beds information ensures that when consumers are entered into the system, they will have beds to be moved into.

## Step 1: Entering Key Agency Staff Into AWARDS

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The first step in the implementation team start-up process is to enter key agency staff into the AWARDS system, identify them as AWARDS users, and grant them the authority necessary to do their jobs. This process has five parts:

- A. Entering a Staff Information Record
- B. Creating an AWARDS Login
- C. Assigning a Program Director
- D. Assigning Permissions
- E. Finishing Up

**IMPORTANT!** The agency implementation team must complete these steps for each key employee at the agency; this may include the executive director, deputy director, QA staff, program supervisors, and others. Begin with the executive director of each program and continue down through the levels of staff. Proceeding in this order is required as each employee's supervisor must already have been entered into the system prior to his or her own entry.

### Part A: Entering a Staff Information Record

The first step in entering agency staff into AWARDS is to enter employee information into the AWARDS system. This information, in the form of staff information records, must be entered for each agency employee. Staff information records include payroll group status history, agency, job title, personal, demographic, supervisor, and workschedule information.

To enter a staff information record for an employee, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Human Resources**. The *Human Resources Menu* page is displayed.
2. Click the **Database Mode** drop-down arrow and select "Data Entry."
3. Click **Staff Information**. The *Staff Information Worker Selection* page is displayed.
4. Click the **Worker** drop-down arrow and look for the name of the employee for whom the staff information record is being entered. If he or she is not listed, select "NEW HIRE" and continue with step 5. If he or she is listed, it is not necessary to enter a staff information record; continue with **Part B: Creating an AWARDS Login**.

5. Click **CONTINUE**. The *NEW HIRE Staff Information* page is displayed.
6. Complete the employee's staff information record with as much detail as possible by configuring the fields and options on this page. Required fields/options are as follows: **First Name**, **Last Name**, **Payroll Group**, **Hours/Week**, **Group Start** (date), and **Work Supervisor**.  
*NOTE: If the staff information record is being entered for an executive director, the Work Supervisor should be set to "Self."*  
*NOTE: For more detailed information on the fields and options on the NEW HIRE Staff Information page, please see the AWARDS Administration User's Manual or the AWARDS Online Help system accessed from within the application.*
7. Click **UPDATE** to save the staff information record. A read-only report version of the record is displayed.
8. Verify that the information that was entered in the staff information record is correct. If it is necessary to make a change, click **DATA ENTRY** to return to the *NEW HIRE Staff Information* page, otherwise, continue with step 9.
9. Click **Opening Menu**. The *AWARDS Opening Menu* page is displayed.

The process of entering a staff information record is complete. Continue with: **Part B: Creating an AWARDS Login**.

### Part B: Creating an AWARDS Login

The second step in the process of entering agency staff into AWARDS is to create an AWARDS login for each of the agency employees for whom a staff information record was entered in part A. A login is comprised of the following:

- **Login ID and Password** - The employee is given a login ID and password. These two pieces of information are entered by the employee to access the AWARDS application. Passwords should be kept private by the employee for security purposes.
- **User Group** - The employee is assigned to a user group. The employee's user group determines which modules and features are available to him or her, and which permissions are assigned to him or her by default. These permissions control the level of access within each available module so that users can see and work with only that information for which they have the proper authorization.

To create an AWARDS login, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **System Setup**. The *System Setup Menu* page is displayed.
2. Click **Login Maintenance**. The *Login Maintenance Menu* page is displayed.
3. Click **Create New Login**. The *New System Login Request* page is displayed.
4. In the **Firstname** and **Lastname** fields, type the employee's first and last names exactly as they appear in his or her staff information record.
5. In the **Login** field, type the employee's login ID.  
*NOTE: When entering the login, be sure that it is unique and that it is at least 4, but no more than 8, lowercase letters and/or numbers.*
6. In the **Password** field, type the employee's password.  
*NOTE: When entering the password, use at least 4, but no more than 8, letters and numbers. The employee can later change his or her password, as can his or her supervisor and others with the proper authority.*
7. Click the **User Group** drop-down arrow and select the user group to which the employee is being assigned.

User groups determine which AWARDS modules and features are available to the employee, as well as which permissions are assigned to him or her by default; for example, by default, members of the

Operations, Fundraising, and Human Resources usergroups do not have access to consumer chart records, and only Executive, Fiscal, and Human Resources usergroup members have access to administration and executive AWARDS records.

**NOTE:** For more detailed information on usergroups, please see the AWARDS Administration User's Manual, the AWARDS Online Help system accessed from within the application, or the Understanding User Groups and Permissions supplement.

8. Click **SUBMIT REQUEST**. The employee's login ID and password are saved and a confirmation page is displayed stating that the login request was successfully created.
9. Click **Opening Menu**. The *AWARDS Opening Menu* page is displayed.

The process of creating an AWARDS login is now complete. If the employee for whom the login was created is the director or deputy director of an agency program, continue with **Part C: Assigning a Program Director/Deputy Directors**. For all others, continue with **Part D: Assigning Permissions**.

### Part C: Assigning a Program Director/Deputy Directors

After logins have been activated, the program director and deputy directors of each agency program must be assigned as such in AWARDS.

To assign a program director and deputy director(s), complete the following steps:

1. From the *AWARDS Opening Menu* page, click **System Setup**. The *System Setup Menu* page is displayed.
2. Click **Agency Program Information**. The *Agency Programs Update Menu* page is displayed.
3. Click **Configure Administration**. The *Configure Administrative Information* selection page is displayed.
4. Click the **Program/Site** drop-down arrow and select the program to which the director is to be assigned.
5. Click the **Database** drop-down arrow and select "Data Entry."
6. Click **CONTINUE**. The *Configure Administrative Information* menu page is displayed.
7. Click **Program Director**. The *Configure Program Director* page is displayed.
8. Click the **Change to** drop-down arrow and select the employee to be assigned as the program director at the selected program.
9. Click **UPDATE**. The program director information is saved and the *Configure Administrative Information* menu page is re-displayed.

If it is not necessary to assign a deputy director at this time, the process of assigning a program director is now complete. Continue with **Part D: Assigning Permissions**. If it is necessary to assign a deputy director at this time, continue with step 10.

10. Click **Deputy Program Director**. The *Configure Deputy Director* page is displayed.
11. To enter deputy director information for the first time, click the **Assign Deputy Program Director** drop-down arrow and select the employee who is to be assigned as a deputy director. Continue with step 12.  
To add an employee to the list of deputy directors, click **Add New**. The *Configure Deputy Director Selection* page is displayed. Continue with step 14.
12. Click **ADD DEPUTY**. The deputy director information is saved and the *Configure Administrative Information* menu page is re-displayed.
13. Click **Opening Menu**. The *AWARDS Opening Menu* page is displayed. Continue with **Part D: Assigning Permissions**.
14. Click the **Assign Deputy Program Director** drop-down arrow and select the employee to be assigned as a deputy director.
15. Click **Add**. The deputy director information is saved and the *Configure Administrative Information* menu page is re-displayed.
16. Click **Opening Menu**. The *AWARDS Opening Menu* page is displayed.

The process of assigning a program director/deputies is now complete. Continue with **Part D: Assigning Permissions**.

## Part D: Assigning Permissions

Once a login has been activated for each agency employee, permissions must be assigned to those employees. Permissions are used in AWARDS to control the level of access within each available module so that users can see and work with only that information for which they have the proper authorization.

Some permissions may already have been granted to the employee by default based on his or her user group; however, in most cases additional permissions must be assigned in order to ensure that the employee has access to the appropriate application modules and features, as well as to the appropriate information within those features. For example, while the employee's assigned user group may have made several modules and features *available* to him or her, that does not always mean that those modules and/or their features are *accessible* and can be used. In such cases, permissions must be assigned in order for the employee to access the modules and features of the application in which he or she will need to work.

To assign permissions to the employee, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **System Setup**. The *System Setup Menu* page is displayed.
2. Click **Permissions Maintenance**. The *Permissions Maintenance Settings* page is displayed.
3. Click the **Database** drop-down arrow and select "Data Entry."
4. Click the **Worker** drop-down arrow and select the employee for whom permissions are to be assigned.
5. Click the **Permission** drop-down arrow and select "All Types."
6. Click **CONTINUE**. The *Permissions Settings* page is displayed. This page is separated into groups of check boxes for assigning permissions in the following areas: Internal Audit Messages, General Chart Access, Data Entry/Access, and Exception Overrides.
7. Grant additional permissions and/or revoke default permissions as necessary using the available check boxes. Keep in mind the following when working with each permission type:
  - **Internal Audit Messages** - These permissions control who receives internal audit messages. Internal audit messages are periodically generated by the AWARDS system in order to help users keep track of and collect important program information.
  - **General Chart Access** - These permissions determine which programs the user has access to, and therefore which agency records he or she can see and work with. With the exception of those users assigned to the Executive Officer or System Administrator usergroups, which by default have access to all programs, every employee must be assigned one or more general chart access permissions.
  - **Data Entry / Access** - These permissions determine which available module features the user can access and work with, and more specifically the records within those module features he or she can view and enter or update information within. With few exceptions (Executive Officer, System Administrator, Intake, and Entitlements), no usergroups are granted data entry/access permissions by default; this must be done manually.
  - **Exception Overrides** - These permissions determine whether the user has the authority to enter information into the system that does not meet "standard" guidelines for data entry (for example, backdating information). They also determine whether he or she can enter system or agency information such as logins and permissions.
8. Click **UPDATE** to save the permission settings. A read-only report version of the *Permissions Settings* page is displayed.
9. Click **Opening Menu**. The *AWARDS Opening Menu* page is displayed.

The process of assigning permissions is now complete. Continue with **Part E: Finishing Up**.

## Part E: Finishing Up

To finish the start-up process of entering agency staff into AWARDS, complete the following remaining steps for each new AWARDS user:

1. Test the employee's new AWARDS login ID and password by logging in to AWARDS as that employee. While logged in to AWARDS as the employee, make sure that he or she was assigned to the correct user group and that the appropriate permissions were assigned. To do so, verify that all necessary AWARDS features are available and accessible. When finished, be sure to log out.
2. Provide the employee and his or her supervisor with the new AWARDS login ID and password. At this time it may be useful to remind the employee/new AWARDS user to keep his or her password secure, and also to explain that this password may be changed at a later time.

*NOTE: Supervisors may not only change their own passwords, but also those of their supervisees.*

The finishing up process is now complete. Continue with **Step 2: Entering Residence Units/Beds Information**.

## Step 2: Entering Residence Units/Beds Information

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The second step in the implementation team start-up process is to enter residence units/bed information for each agency program. Entry of this information is required prior to consumer intake/admissions so that the consumers will have beds to be moved into.

To enter residence units/beds information for an agency program, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **System Setup**. The *System Setup Menu* page is displayed.
2. Click **Residence Units**. The *Residence Units List* page is displayed.
3. Click the **Program** drop-down arrow and select the program/agency for which the residence units/beds information is to be entered.
4. Click the **Status** drop-down arrow and select "Current Units."
5. Click the **Database** drop-down arrow and select "Data Entry."
6. Click **CONTINUE**. The *Residence Units Data Entry* page is displayed.
7. Configure the blank "New Unit" fields at the bottom of the page, including: **Address, Apt, City, State, Zip, Onset** (date), **Gender**, and **SmokeFree**.

*NOTE: For more detailed information on the fields and options on the Residence Units Data Entry page, please see the AWARDS Administration User's Manual or the AWARDS Online Help system accessed from within the application.*

8. Click **UPDATE**. The residence units/beds information is saved and the updated *Residence Units Data Entry* page is displayed.
9. Repeat steps 7 and 8 as necessary until each unit/bed at the selected program has been entered separately.
10. Click **Opening Menu**. The *AWARDS Opening Menu* page is displayed.

The process of entering residence units/beds information is now complete.

**The AWARDS implementation team start-up process is now complete.**

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