ResourceTracker

AWARDS INSTRUCTION SHEET

The ResourceTracker in the AWARDS Operations module is used to create and track service tickets or requests that use agency resources outside of case management. This highly customizable feature provides agencies a way for users to report issues, for responders to report progress and the ability to generate reports containing ticket information. It can be customized within the agency by users with proper permission.

In order for the ResourceTracker to be turned on at your agency, you will need to discuss with a Client Services representative how you'd like to use the tool and what will be tracked. This conversation will help to determine the customized name for the feature, which must be decided prior to turning it on for your agency. For example, when tracking technical resources the feature might be called the IT Service Desk or IT Help Desk. Anywhere "ResourceTracker" is referenced in this document, your customized feature name will display in AWARDS.

Further, it is possible to have multiple instances of this feature turned on within each agency. For example, one version of the feature can be turned on to track maintenance tickets, and a separate version can be turned on to track IT tickets. Each version would have its own set of permissions and be separately configurable.

*For **single agency** databases, all users will have access to any ResourceTracker turned on with the database. For **multi-agency** databases, the ResourceTracker can be turned on at the agency/division layer. Only staff members within the agency/division that a ResourceTracker is turned on for can access it. CoC staff members will only have access to those ResourceTrackers set to display for CoC users and will not have access to each separate agency/division's ResourceTracker.*

ABOUT THIS DOCUMENT

This document is intended to guide you through the process of configuring the ResourceTracker, reporting an issue, responding to the issue, and running reports containing ticket information. Specific topics covered are:

CONFIGURING THE RESOURCETRACKER

Each agency can configure the ResourceTracker to reflect the types of resources being tracked, and the information relevant to each ticket. This process allows agencies to customize terminology, instructions, and list contents.

Permissions required to configure the ResourceTracker are:

- ***Data Entry / Access*** *- You must have the "ResourceTracker Configure" permission, which will reflect the customized name of this feature for your agency in place of "ResourceTracker."*

To configure the ResourceTracker, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Operations**. The *Operations Menu* page is displayed.

2. Click **ResourceTracker Configure** (which will have a label specific to your agency in place of "ResourceTracker"). The *ResourceTracker Work Orders – Report Configuration* page is displayed, containing a table of configurable options.

   ResourceTracker
   Work Orders - Report Configuration

Form Field	Field Label	Required for Responder	Required for Requestor	Option List	Include in Notification Messages	Required Only for Status of
Unique Work Request Number:	Unique Work Request Number				☐	
Requestor:	Requestor	☑	☐		☐	
Brief description of Work Requested:	Brief description of Work Requested	☑	☐		☐	New
Work Category:	Work Category	☑	☐		☐	

   This configuration table contains the following settings, which can be applied to each of the "Form Fields" listed in the far left column (each Form Field is explained in more detail in further steps):

   - **Field Label** – Enter the label that should be used for the associated field on the ticket.
   - **Required for Responder** – Check this check box if the associated field should be required for responders completing the ticket.
   - **Required for Requester** – Check this check box if the associated field should be required for requestors completing the ticket.
   - **Option List** – Enter any list items that should be available in the associated field's drop-down list. Type each entry on its own line.
   - **Include in Notification Messages** – Check this check box if the associated field should be included in the ResourceTracker Messages that are automatically generated and sent to the requestor and users with the "ResourceTracker Messages" Internal Audit Message permission when a ticket is entered or updated.
   - **Required Only for Status of** – If the associated field should be conditionally required based on a specific status, click this drop-down arrow and select that status.

3. Each ticket will have a "Unique Work Request Number." This number is automatically generated by AWARDS and is not editable. Customize how this field will display on the ticket and other properties by entering the following data: **Field Label** (i.e., Ticket Number, Service Desk ID, or Maintenance ID), **Include in Notification Messages**.

4. Customize how the Requestor field will display on the ticket and other properties by entering the following data: **Field Label**, **Required for Responder**, **Required for Requestor**, **Include in Notification Messages**.

5. Customize how the Brief Description of Work Requested field will display on the ticket and other properties by entering the following data: **Field Label**, **Required for Responder**, **Required for Requestor**, **Include in Notification Messages**, **Required Only for Status of**.

6. Customize how the Work Category field will display on the ticket and other properties by entering the following data: **Field Label**, **Required for Responder**, **Required for Requestor**, **Option List**, **Include in Notification Messages**, **Required Only for Status of**.

7. Customize how the Status field will display on the ticket and other properties by entering the following data: **Field Label**, **Required for Responder**, **Required for Requestor**, **Option List**, **Include in Notification Messages**.

8. In the **Allow users to select a status option on the Search Criteria page that excludes one specified status** text box, enter any statuses entered in step 7 that should be negated on the Search Criteria page when searching for tickets. Statuses entered here are preceded by "All Not."

   For example, if the statuses entered in step 7 were "New," "In Progress," and "Closed," and all three are also entered in step 8, the Status drop-down list on the Search Criteria page would list "All," "New," "In Progress," "Closed," "All Not New," "All Not In Progress," and "All Not Closed."

9. Customize how the Priority field will display on the ticket and other properties by entering the following data: **Field Label**, **Required for Responder**, **Required for Requestor**, **Option List**, **Include in Notification Messages**, **Required Only for Status of**.

10. Customize how the Site Address of Request field will display on the ticket and other properties by entering the following data: **Field Label** (i.e., Requesting Site, Building), **Required for Responder**, **Required for Requestor**, **Option List**, **Include in Notification Messages**, **Required Only for Status of**.

11. Customize how the Room Location at Site field will display on the ticket and other properties by entering the following data: **Field Label** (i.e., Location, Room), **Required for Responder**, **Required for Requestor**, **Option List** (a text box will also be available for requestors to enter a location not on the drop-down list), **Include in Notification Messages**, **Required Only for Status of**.

12. Customize how the Scheduled Date for Work field will display on the ticket and other properties by entering the following data: **Field Label**, **Required for Responder**, **Required for Requestor**, **Include in Notification Messages**, **Required Only for Status of**.

13. Customize how the Date Work Completed field will display on the ticket and other properties by entering the following data: **Field Label**, **Required for Responder**, **Required for Requestor**, **Include in Notification Messages**, **Required Only for Status of**.

14. Customize how the Responder field will display on the ticket and other properties by entering the following data: **Field Label** (i.e., Primary Tech, Assigned To), **Required for Responder**, **Required for Requestor**, **Option List**, **Include in Notification Messages**, **Required Only for Status of**.

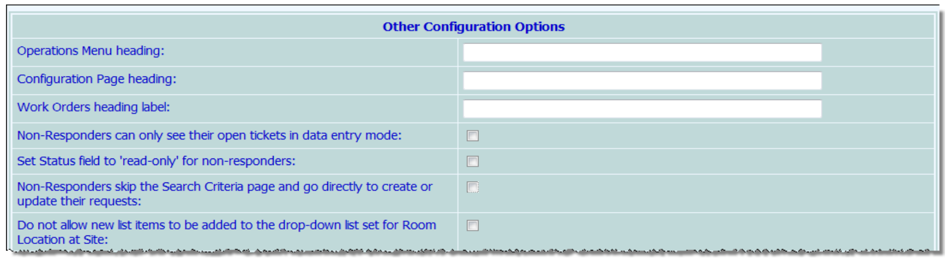
15. Customize how the Additional Responder field will display on the ticket and other properties by entering the following data: **Field Label** (i.e., Secondary Tech, Backup), **Required for Responder**, **Required for Requestor**, **Include in Notification Messages**, **Required Only for Status of**.

16. Customize how the Description of Work Performed field will display on the ticket and other properties by entering the following data: **Field Label**, **Required for Responder**, **Required for Requestor**, **Include in Notification Messages**, **Required Only for Status of**.

17. Customize how the Material Cost field will display on the ticket and other properties by entering the following data: **Field Label**, **Required for Responder**, **Required for Requestor**, **Include in Notification Messages**, **Required Only for Status of**.

18. Customize how the Labor Hours field will display on the ticket and other properties by entering the following data: **Field Label**, **Required for Responder**, **Required for Requestor**, **Include in Notification Messages**, **Required Only for Status of**.

19. In the “Other Configuration Options” section of the page, enter data in the following fields and options as applicable, to further customize the Resource-Tracker:



- **Operations Menu Heading** – In this field, enter the label that should display for this customized feature in the Operations Menu heading.

- **Configuration Page Heading** - In this field, enter the label that should display for this customized feature in the configuration page’s heading.

- **Work Orders Heading Label** – In this field, enter the label that should be used in place of “work orders” – if applicable. (i.e., Service Ticket, Work Request, Maintenance Request)

- **Non-Responders can only see their open tickets in data entry mode** – Check this check box to limit non-responders (users who only have the ability to submit a ticket, but not respond to it) to viewing only their own active tickets on the *Work Orders – Data Entry Index* page, instead of seeing all items submitted by all users. Active items are those that do not have a completed date entered. Non-responders will only be able to view other tickets using the Search Criteria tool in Report Mode if this option is turned on.

- **Set Status field to “read-only” for non-responders** – Check this check box to make the Status option on a ticket read-only for non-responders (users who only have the ability to submit a ticket, but not respond to it). If checked, the Status defaults to “New” (or whatever label has been configured for new requests) when non-responders create a new ticket. When non-responders update an existing request while this option is turned on, the Status displays in read-only mode; only responders can update Status information in such cases.

- **Non-Responders skip the Search Criteria page and go directly to create or update their requests** – Check this check box if non-responders should bypass the *ResourceTracker Work Orders – Search Criteria* page when accessing this feature. If checked, non-responders (users who only have the ability to submit a ticket, but not respond to it) are taken directly to the *Work Orders – Data Entry Index* page after clicking ResourceTracker from the *Operations Menu* page.

  This does not completely remove access to the Search Criteria page for non-responders, as a Search Criteria button is available at the bottom of the index page.

- **Do not allow new list items to be added to the drop-down list set for Room Location at Site** – When a ticket is created, the room location options (configured in step 11) appear in a drop-down list, and a text box is also displayed for users to enter a location not contained in the list. Check this check box if these other locations should not be automatically added to the Location drop-down list going forward. If this is left unchecked, other locations entered in the Location text box on the ticket are automatically added to the Location drop-down list for future tickets.

- **Include notes in notification message** – Check this check box if the notes entered on the ticket should be included in the ResourceTracker Messages that are automatically generated and sent to the requestor and users with the “ResourceTracker Messages” Internal Audit Message permission.

- **User Instructions** – In this text box, enter any instructions that may apply to requestors or responders. The text entered here will open in a new window if the **User Instructions** button is clicked on the bottom of a ticket.

20. Click **CONTINUE** to save the customized settings and return to the *Operations Menu* page.

The process of configuring the ResourceTracker feature is now complete.

CREATING A NEW TICKET

Any user with access to the Operations module can create a new ticket within the ResourceTracker.

IMPORTANT! *Ticket forms are highly configurable by each agency. As a result, labels contained in this document will vary from those in the system.*

To create a ticket using the ResourceTracker feature, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Operations**. The *Operations Menu* page is displayed.

2. Click **ResourceTracker** (which will have a label specific to your agency). The *ResourceTracker Work Orders – Search Criteria* page is displayed for users with the ability to respond to tickets or for all users if it has been configured to do so. If you are taken to the *Search Criteria* page, continue with step 3. →

   Otherwise, you are taken to the *ResourceTracker Work Orders – Data Entry Index* page and should continue with step 5.

3. Click the **Database** drop-down arrow and select "Data Entry."

4. Click **CONTINUE**. The *ResourceTracker Work Orders – Data Entry Index* page is displayed.

5. Check the **Select** check box next to the "Create New" option.

6. Click **CONTINUE**. The *ResourceTracker Work Orders – Data Entry* page is displayed.

7. The fields and options on the *Data Entry* page vary based on how the ResourceTracker is configured, and on the type of resource being tracked. Enter ticket information using the fields and options on this page as necessary, and then continue with step 0.

   Fields and options marked with red asterisks (*) are required, and any conditional components of the requirements are noted in red text next to the asterisks.

   The basic fields included on this form are as follows, though some may not be available for data entry based on user access and configuration settings:

Brief Description of Work Requested	Work Category
Status	Priority
Requesting Site / Location	Scheduled Work Date
Date Work Completed	Responder and Additional Responder
Material Cost	Labor Hours
Description of Work Performed	Notes

If a Room Location is selected from corresponing drop down list, and text is also entered into the adjacent text box, only the text entered in the textbox will be retained when the ticket is saved. The purpose of the text box is to allow users to enter a room location not listed on the drop-down list.

8. Click **CONTINUE**. The ticket information is saved and the *ResourceTracker Work Orders – Data Entry Index* page is displayed, including the newly created ticket.

   At this time a system generated message for the ticket is sent to the requestor and users with the "ResourceTracker Messages" Internal Audit Message permission.

The process of creating a new ticket is now complete.

UPDATING/RESPONDING TO A TICKET

All users have the ability to update or delete tickets they created; however, only those with the appropriate permission can update (or respond to) tickets created by other users.

IMPORTANT! *Ticket forms are highly configurable by each agency. As a result, labels contained in this document will vary from those in the system.*

Permissions required to update or respond to a ticket are:

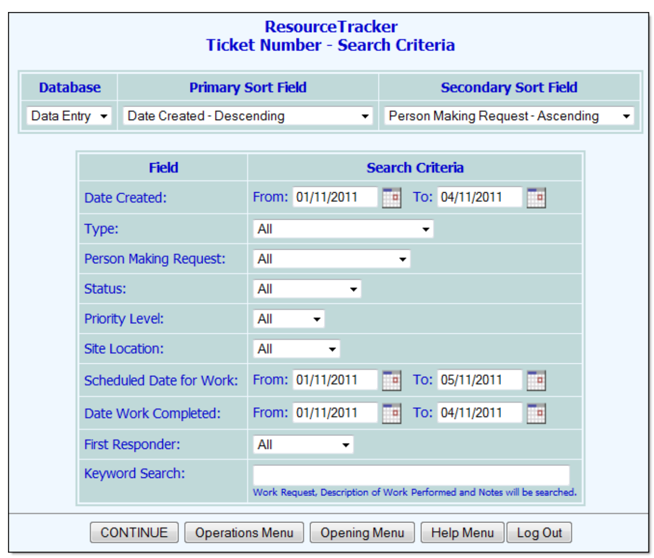
- ***Data Entry / Access*** *– To update or respond to tickets created by other users, you must have the "ResourceTracker Update" permission, which will reflect the customized name of this feature for your agency in place of "ResourceTracker."*

To update or respond a ticket using the ResourceTracker, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Operations**. The *Operations Menu* page is displayed.

2. Click **ResourceTracker** (which will have a label specific to your agency). The *ResourceTracker Work Orders – Search Criteria* page is displayed for users with the ability to respond to tickets or for all users if it has been configured to do so. If you are taken to the *Search Criteria* page, continue with step 3.

   Otherwise, you are taken to the *ResourceTracker Work Orders – Data Entry Index* page and should continue with step 6.



3. Click the **Database** drop-down arrow and select "Data Entry."

4. The settings on the *Search Criteria* page allow you to filter which tickets are able to be accessed from the data entry index page that follows. To narrow ticket selection, configure one or more of the selection options on this page:

- **Primary Sort Field** – Click this drop-down arrow and select the field by which the tickets should be sorted on the index page.

- **Secondary Sort Field** – Click this drop-down arrow and select the field by which the tickets should be sub-sorted on the index page.

- **Date Created** – Enter dates in the **From** and **To** fields to filter the tickets that appear on the index page. Only those created during the date range entered will be available for data entry. The default date range is three months in the past through today's date.

- **Work Category** – To filter the tickets by work category, click this drop-down arrow and select the appropriate work category. The default value is "All."

- **Requestor** – To filter the tickets by requestor, click this drop-down arrow and select the appropriate staff name. The default value is "All."

- **Status** – To filter the tickets by status, click this drop-down arrow and select the appropriate status. The default value is "All."

- **Priority** – To filter the tickets by priority, click this drop-down arrow and select the appropriate priority. The default value is "All."

- **Requesting Site** – To filter the tickets by requesting site, click this drop-down arrow and select the appropriate site. The default value is "All."

- **Scheduled Date for Work** – To filter the tickets by the date for which work is scheduled, enter dates in these **From** and **To** fields. Only those whose scheduled work date falls within the date range entered will be available for data entry. The default date range is three months in the past through one month in the future.

- **Date Work Completed** – To filter the tickets by the date on which work was completed, enter dates in these **From** and **To** fields. Only those whose date of work completion falls within the date range entered will be available for data entry. The default date range is three months in the past through today's date.

- **Responder** - To filter the tickets by the assigned responder, click this drop-down arrow and select the appropriate staff name. The default value is "All."

- **Keyword Search** – To filter the tickets based on a certain word or phrase, enter the applicable search criteria in this field. The "Brief Description of Work Requested," "Description of Work Performed," and "Notes" sections of the tickets will be searched for the keywords, and only those tickets with a match are included on the data entry index page.

5. Click **CONTINUE**. The *ResourceTracker Work Orders – Data Entry Index* page is displayed.

6. Click the **Select** check box next to the ticket to be updated or responded to.

7. Click **CONTINUE**. The *ResourceTracker Work Orders – Data Entry* page is displayed.

8. The fields and options on the *Data Entry* page vary based on how the ResourceTracker is configured, and on the type of resource being tracked. Enter or update information on this page as necessary, and then continue with step 10.

   Fields and options marked with red asterisks (*) are required, and any conditional components of the requirements are noted in red text next to the asterisks.

9. The basic fields and options included on this form are as follows, though some may not be available for data entry based on user access and configuration settings:

Brief Description of Work Requested	Work Category
Status	Priority
Requesting Site / Location	Scheduled Work Date
Date Work Completed	Responder and Additional Responder
Material Cost	Labor Hours
Description of Work Performed	Notes

*To DELETE an existing ticket rather than update it, click the **Delete** button at the bottom of the page. A confirmation message is displayed. Click **OK** to continue with the deletion, and the* ResourceTracker Work Order – Data Entry Index *page is then displayed.*

10. Click **CONTINUE**. The ticket information is saved and the *ResourceTracker Work Orders – Data Entry Index* page is displayed, including the updated ticket.

At this time a system generated message for the ticket is sent to the requestor and users with the "ResourceTracker Messages" Internal Audit Message permission.

The process of updating/responding to a ticket is now complete.

VIEWING RESOURCETRACKER REPORTS

The reporting feature within the ResourceTracker allows users to view reports of tickets submitted by themselves or anyone at the agency.

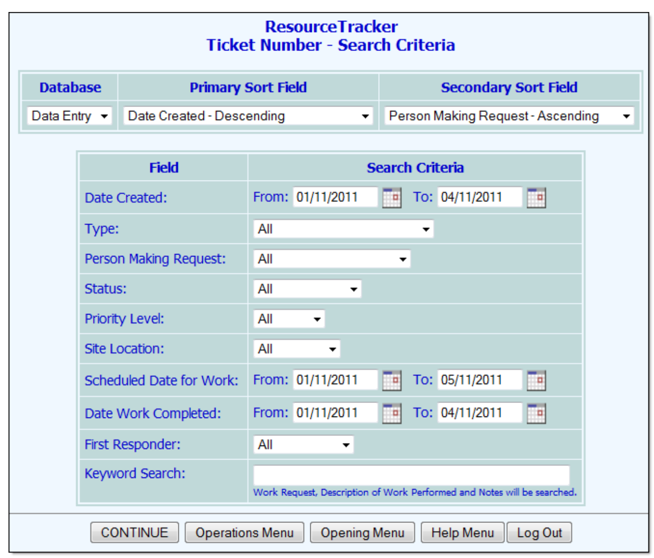
IMPORTANT! *Ticket forms are highly configurable by each agency. As a result, labels contained in this document will vary from those in the system.*

To view a ResourceTracker report, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Operations**. The *Operations Menu* page is displayed.

2. Click **ResourceTracker** (which will have a label specific to your agency). The *ResourceTracker Work Orders – Search Criteria* page is displayed for users with the ability to respond to tickets or for all users if it has been configured to do so. If you are taken to the *Search Criteria* page, continue with step 4.

   Otherwise, you are taken to the *ResourceTracker Work Orders – Data Entry Index* page and should continue with step 3.



3. At the bottom of the page, click **Search Criteria**. The *ResourceTracker Work Orders – Search Criteria* page is displayed.

4. Click the **Database** drop-down arrow and select

"Reports."

5. The settings on the *Search Criteria* page allow you to filter which tickets are displayed on the report. To narrow report results, configure one or more of the selection options on this page:

   - **Primary Sort Field** – Click this drop-down arrow and select the field by which the tickets should be sorted on the report.

   - **Secondary Sort Field** – Click this drop-down arrow and select the field by which the tickets should be sub-sorted on the report.

   - **Date Created** – To filter the tickets by date, enter dates in these **From** and **To** fields. Only those created during the date range specified here are included in the report contents. The default date range is three months in the past through today's date.

   - **Work Category** – To filter the tickets by work category, click this drop-down arrow and select the appropriate work category. The default value is "All."

   - **Requestor** – To filter the tickets by requestor, click this drop-down arrow and select the appropriate staff name. The default value is "All."

   - **Status** – To filter the tickets by status, click this drop-down arrow and select the appropriate status. The default value is "All."

   - **Priority** – To filter the tickets by priority, click this drop-down arrow and select the appropriate priority. The default value is "All."

   - **Requesting Site** – To filter the tickets by requesting site, click this drop-down arrow and select the appropriate site. The default value is "All."

   - **Scheduled Date for Work** – To filter the tickets by the date for which work is scheduled, enter dates in these **From** and **To** fields. Only those tickets whose scheduled work date falls within the date range specified here are included in the report contents. The default date range is three months in the past through one month in the future.

   - **Date Work Completed** – To filter the tickets by the date on which work was completed, enter dates in these **From** and **To** fields. Only those tickets whose date of work completion falls within the date range specified here are included in the report contents. The default date range is three months in the past through today's date.

   - **Responder** - To filter the tickets by the assigned responder, click this drop-down arrow and select the appropriate staff name. The default value is "All."

   - **Keyword Search** – To filter the tickets based on a certain word or phrase, enter the applicable search criteria in this field. The "Brief Description of Work Requested," "Description of Work Performed," and "Notes" sections of the tickets are searched for the keywords, and only those tickets with a match are included in the report contents.

6. Click **CONTINUE**. The *ResourceTracker Work Orders – Report* page is displayed.

   Some headings in the table of report results are clickable links that allow you to change how the report is sorted. An Excel File link is also included at the top of the report, enabling you to export the report data into an Excel spreadsheet, if needed.

The process of viewing a ResourceTracker report is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding the ResourceTracker can be a useful reference when you have your own questions about the functionality.

ARE ALL USERS ABLE TO ENTER REQUESTS OR ARE PERMISSIONS REQUIRED?

All users with access to the Operation module can enter requests in the ResourceTracker, as well as update and delete those requests which they themselves entered; however, in order to respond to tickets created by other users the "ResourceTracker Update" permission is required.

*For **single agency** databases, all users have access to any ResourceTracker turned on with the database. For **multi-agency** databases, the ResourceTracker can be turned on at the agency/division layer. Only staff members within the agency/division that a ResourceTracker is turned on for can access it. CoC staff members only have access to those ResourceTrackers set to display for CoC users and do not have access to each separate agency/division's ResourceTracker*

HOW ARE THE UNIQUE WORK REQUEST NUMBERS DETERMINED?

AWARDS assigns each new request a work request number automatically, in ascending numeric order. If more than one version of the ResourceTracker is turned on at your agency, the numbered list is shared among the different versions so there are no duplicate request numbers. For example, if ten requests are created in one version of the ResourceTracker, and then a new request is entered in a different version the new request would be labeled as the eleventh request.