

ComTrack User Guide



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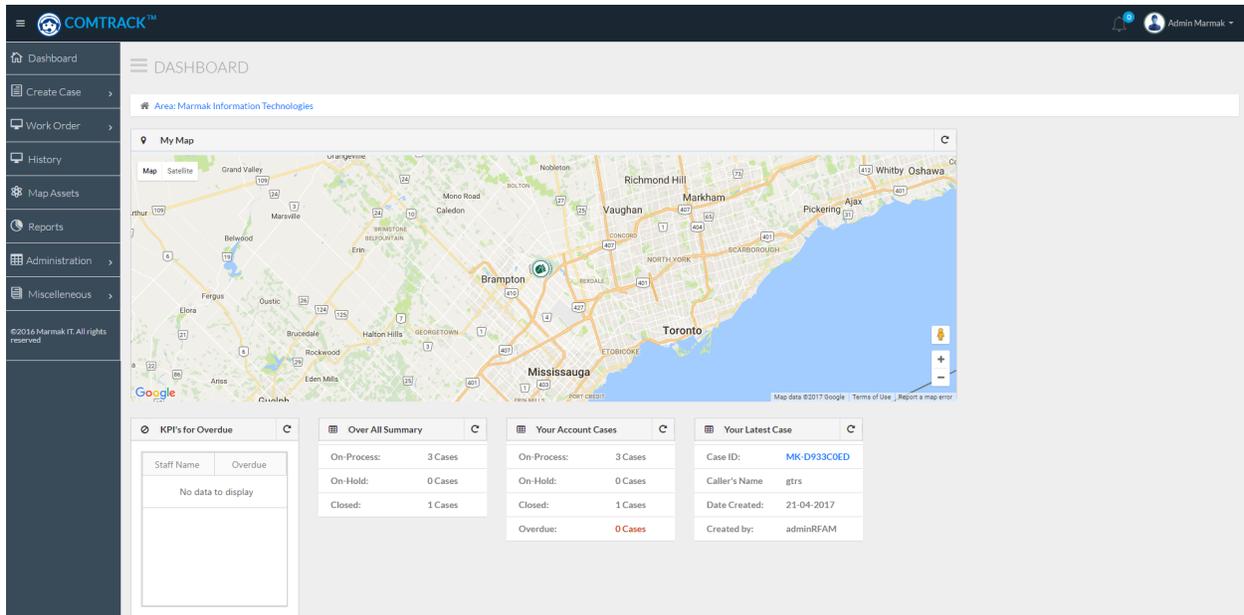
Overview/ Abstract

ComTrack is an interactive service request web application. It is designed to accommodate the needs of city management, aid inspectors in creating work orders, and offer the public a user friendly way to alert the city of local deficiencies. ComTrack is capable of creating detailed work orders, it allows for the response of incoming requests for the dealing of various issues occurring around your city. ComTrack also allows you to view work orders, their progress and make adjustments or the needed changes to them. You can also visualize a map layout of work orders, compile specific reports, and control administrative options such as turning on and off functions and modules, adding users, setting work day limits to various predefined deficiencies, adding assets that exist in the city to better understand the environment of the city, and set up your mailing and email notification system. The functionality, future modifications and adaptability of ComTrack is endless. It is capable of being customized, altered and developed further.

Components & Functionality

Dashboard

The dashboard is your default page. It shows a local map with tags for open work orders. Being an administrator you have the opportunity to view an *overall summary* and *your account cases* with the pertaining subheadings on-process, on-hold, closed and overdue with the related number of cases for each section. The dashboard also offers details based on your latest case, its ID, the caller's name, date created and who created it. Work load gauges are offered to visualize the work load of items On-process, On- Hold, Closed, Overdue and an activity chart aids in the understanding of how many calls are coming in and who is responding to them. The final chart offered is the monthly cases occurrence which offers a comparison of the number of cases dealt with the current month in relation to the aggregate number of cases of the previous year.



Create Case

Incoming Requests

Management can review all cases that have been input by citizens and the public in the incoming request section. And they are able to search through different fields to find specific cases to address and convert into a work order.

By Asset (Local)

An individual responding to requests that are called in has the opportunity to input the information into the *by Asset (local)* section to create a case for the city to review and attend to, by inputting the individuals complaints into the relating forms and filling out each area of the case form. Adding all necessary details will better aid in management's dealings of the situation. After it is filled out the case can be saved/generated.

The screenshot displays the 'CREATE CASE BY ASSET (LOCAL)' form in the COMTRACK system. The interface is organized into three main columns:

- Target Location:** Features a map with a red location pin and two options for input: 'Option 1: Grab and Drag Marker' and 'Option 2: Type address'. Below the map are input fields for 'Street Number', 'Street Name', and 'City or Province'.
- Contact Information:** A vertical stack of input fields for 'Caller's Name', 'Caller's Email', 'Street Number', 'Street Name', 'Province', 'Canada', and 'Phone Number'.
- Add New Case:** A vertical stack of dropdown menus and buttons, including 'Generate ID', 'Marmak Information Technologies', and several 'Choose' and 'Set' options for category, asset, location, deficiency, and priority.

Work Orders

My Work Orders

Allows for admin and users to review the work orders that have been assigned to them to complete. They have the option to search through the number of work orders by helpful fields such as case ID, caller's name, service category, deficiency, case priority, subject and status.

My Overdue

This is a function that allows an administrator and a user to review their overdue work orders and helps to organize and categorize the work that needs to be done. This functionality increases the likelihood of work getting done sooner because of the organized and simplistic fashion of the program.

All Overdue

The all overdue function allows for the administrator to review all of the overdue cases at the city and to see who they are assigned to, they can review the work that is not getting done and who is in charge of completing it. This function reduces the ambiguity of the work order process so everyone is well aware of who is to complete which job and individuals can be held responsible because of clear guidelines, instructions and delegation of the work load of handling these deficiencies.

All Work Orders

Again this function's sole purpose is used by administrators where they can study, review and analyze all of the work orders that need to be completed for the city, including your own and every other worker/ user at the city. Each individual work order will be highlighted either yellow, orange or red, meaning the work order is either near due, due or overdue which is a good indicator in prioritizing work that needs to be completed and shows if your city  OVERDUE  DUE  NEAR DUE is keeping on top of the work that needs to be done.

Batch Process

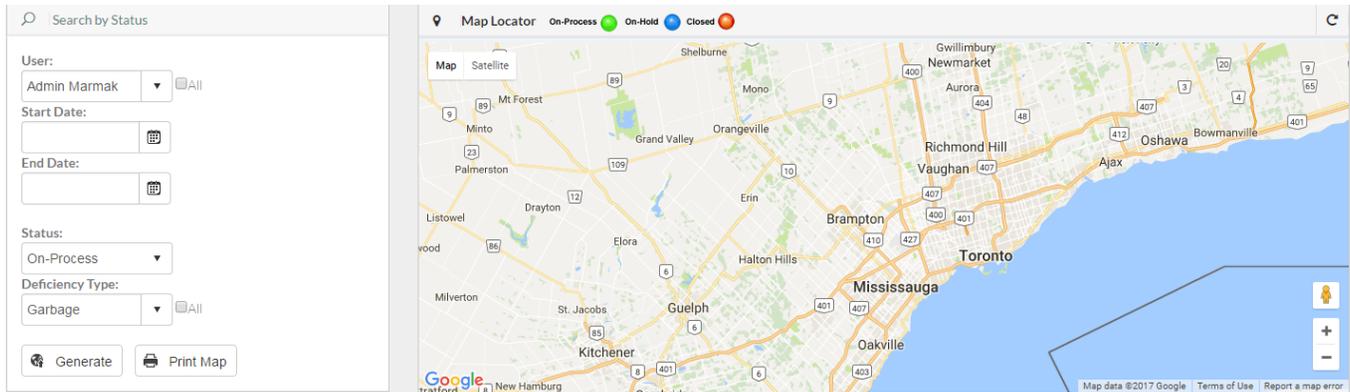
The *Batch Process* function is designed to reduce the work load of closing work orders. For example if in one day you deal with and handle all of the work orders for roadkill you may use this feature and choose the option for roadkill under the category road section. It will provide you with the list of all of the different cases and you can quickly adjust their status, either to on-process, on-hold or closed.

History

The *History* function allows you to review all previous cases and adjustments made to recent cases and search the past actions taken on each specific case. You can review the date the action happened, who was in charge of the action that was taken, and what the specific action was, a log of all prior actions are stored under each case. This can all be done by clicking on the work order ID, to bring up each cases specific history.

Map Assets

The *Map Assets* feature allows for the user to visualize the workload. They are able to review the on-process, on-hold and closed cases. Based on the specific fields such as searching a specific user's progress (or you can search all workers), the time interval you desire to search, if you wish to search a specific status and the deficiency type. All fields draw this information from the work order tab. Once your fields or parameters are set the work orders that fit into your search criteria populate the pertaining map. Each pin is interactive and corresponds to a specific work order and it is able to be accessed and reviewed by clicking on the pin. A print function is also included for variety and accommodation of preferences.



Reports

Work Order Case Report

This is just a formal paper version of the work order that is offered electronically for individuals or those of the public that are not technologically inclined.

Chart Report for Case count Vs Categories- By Year

Is a report that uses bar charts to organize each deficiency type and the quantity of deficiencies to the specific deficiency, the types of service categories (location) used and the staff that responded to the requests along with the number of requests for each staff member and service category for a given year as long as the data is input into the system.

Chart Report for Case count Vs Categories -By Date Range

This case offers the same functionality as the previous report however it gives you the ability to be more specific or general by choosing a shorter period of time or setting an interval that is greater than a year.

Chart Report for Case Count Vs Year

This report is designed to show the number of service cases that have been added each month for a period of a year. This aids management in understanding if there is any correlation over seasonal changes, or specific months in the years and how to be proactive in either having more staff available at certain times of the year to be able to handle anticipated deficiencies and issues.

Chart Report for Case Count Vs Staff/Status

This chart helps management see all of the workers/users in the city and keep track of their work load or case count, the number that are not yet closed that are either on process or on hold. This aids management in getting a better understanding of the workload through the city and who is getting their work done and who isn't or who may need help, to balance the handling or dealing with local deficiencies.

Administration

User Settings

The *User Settings* allows the administrator to input new users into the system and given them a login and a password, to set their department and set their role as being an administrator or a user. It gives you the option to create departments and enter employees in specific department groups. You can then later edit user's details, and have the option to enable and disable accounts. This function is practically the controls & permissions function for the city's administrators.

Modules

Allows you to customize the functions you use, enabling and disabling functions you either want to put to use or are of no value for your city's use of the web application. Such available modules include property module, local DB module, asset module (RFAM plugin), MRC Work Order (Plugin), Asset Module (MDW Plugin) and income request. Some of these features are only possible to use if you have the licence for the other products available, or if you have them hosted on your server. All additional modules and plugins are meant to ease the work load by integrating all of your data across all of the products instead of needing to input individually into each product. You can also adjust the default address that google maps shows on the opening dashboard along with the default case prefix.

AP Deficiencies

This function allows the administrator to set and add different deficiencies that your city has to deal with, along with assigning the work day limit (the number of days until the deficiency needs to be addressed or closed). All entries are able to be edited. This is the case for both asset and property deficiency entries.

Asset Management

This feature is another administrative function that allows you to categorize and input different types of assets. It also gives you the needed option to specify an asset category's location (example: *from road, to road* to break down road sections) to help with the response and handling of a deficiency. If the module for MDW is enabled to have these two products tied together this will allow for you to integrate the software of road segments/sections and you will not need to input it manually.

SMTP Server

This functions sets up and configures the emails in response for work orders. Sending emails to the individual that reported the deficiency and to the city worker that is in charge of responding to it.