

ART Gallery Report 1311

Resource Update Monitor

CallPoint Report

EXECUTIVE SUMMARY:

This report enables stakeholders at Information and Referral (I&R) agencies to easily see whether resources comply with Alliance of Information and Referral Systems (AIRS) Standards for currency of information.

AUDIENCE:

Stakeholders (executive directors and program managers) at I&R agencies wishing to follow AIRS Standards for up-to-date information.

FREQUENCY:

The report should be run regularly to assess whether provider information is current, and to prioritize providers for which updates are becoming more urgent.

PURPOSE:

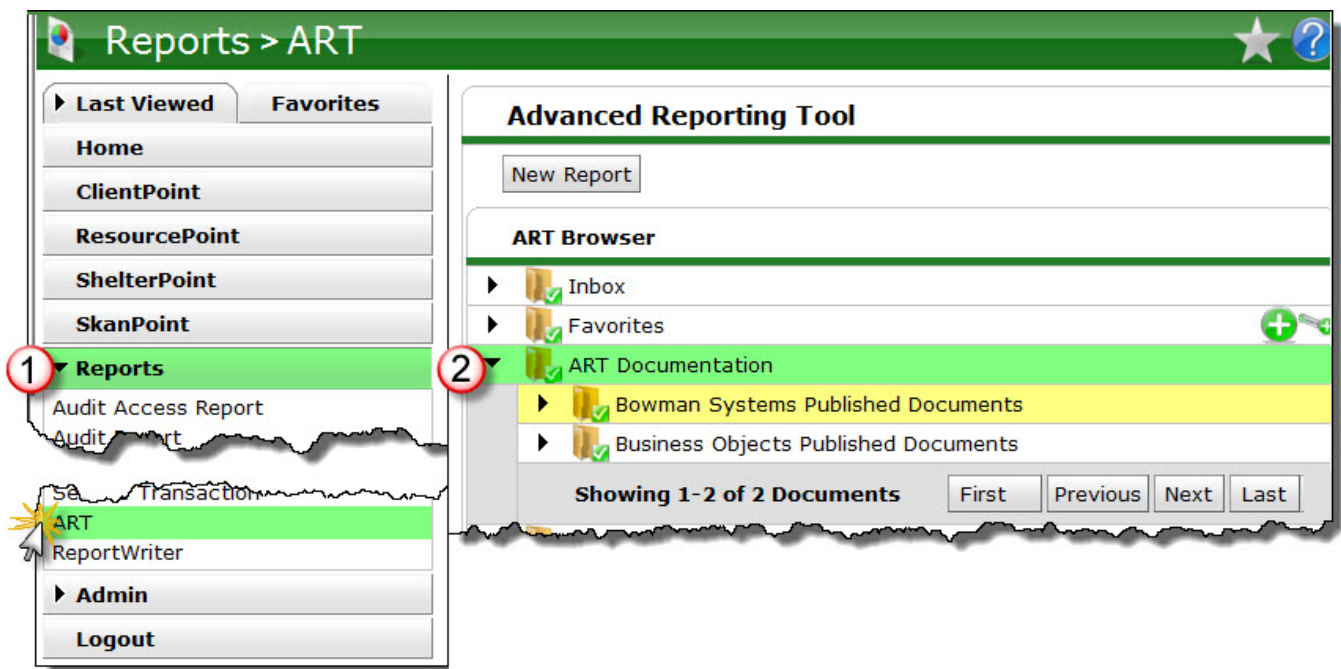
This report is designed as a tool to assist in monitoring update activity. AIRS Standards require that resource provider information be updated regularly (at least once per year.) The report displays resource providers, showing when information was last updated. Using a visual scale, it highlights increasing urgency as providers approach AIRS' 1-year deadline. Tab A displays providers sorted alphabetically, and Tab B lists them in update order.

INSTRUCTIONS:

Instructions on how to retrieve, copy, run, and read this report are outlined below. Requests for additional information concerning the report function/design should be directed to Bowman Systems staff via email (ART_Reports@BowmanSystems.com).

How to retrieve and copy: Detailed step-by-step instructions concerning how to retrieve, save a copy, and map this ART Report to your site can be found in the Bowman Systems Published Documents folder under ART Documentations in your Public Folders.

How to install: The original version of the report is a template and must be copied from the ART Gallery Templates folder into another folder on your site and mapped to your data before it can be used. Detailed instructions for installing report templates are provided in the Bowman Documentation folder on your ART site.



Before running the report: Before running the report, the user must determine the resource groups—and/or providers maintaining—to be included, as well as the number of months of the default time period.

How to run: Upon opening the report, the user will be prompted (see Diagram 1) to specify parameters which control the data returned by the report. Once the user has provided these parameters by responding to the user prompts, a green check-mark will appear next to each field to indicate that a selection has been made. The user should then single-click the “Run Query” button to generate the report.

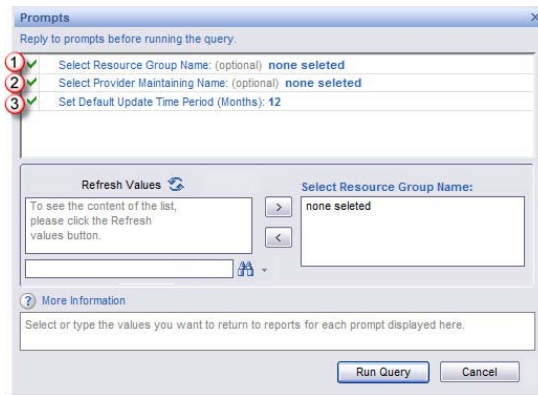


Diagram 1

The three user prompts contained in this report are:

- ① **Select Resource Group Name:** Click the “refresh list” icon and wait for the left window to refresh. Now select Resource Group(s) by highlighting them in the left window and moving them into the right window using the right selection arrow.
- ② **Select Provider Maintaining Name:** Click the “refresh list” icon and wait for the left window to refresh. Now select Provider(s) to include by highlighting them in the left window and moving them into the right window using the right selection arrow.
- ③ **Set Default Update Time Period (Months):** Enter the number of months in the default update time period. The last number you entered here will persist until you enter something else.

IMPORTANT

You must select either a **Resource Group Name** or a **Provider Maintaining Name** before running the report. See Technical Note 1 for more information regarding prompts in this report.

How to read: The report contains four tabs. Each tab is a separate sub-report containing three sections:

- **Report Header:** The header contains the title of the report, and specifies any date parameters. When running the report in “modify” view, the report header is only visible in print/page layout mode.
- **Report Footer:** The report footer contains the title of the report, the name of the sub-report, the page number, the version number, and the date/time the report was run /printed. Like the header, the footer is only visible in print mode when the report is run in modify view.
- **Report Body:** The report body is the main section of the report located between the header and the footer where the reports data is displayed in a variety of different chart and graph formats. The data contained in each of the tabs in this report is displayed and described below.

Tab A – by Provider (Diagram 2). This tab contains information on resource and provider updates, sorted alphabetically by provider. It incorporates a color code to visually prioritize resources and providers most in need of updates.

Resource Update Monitor by Provider		Current as of 6/23/11	
		0 - 3 Months	4 - 6 Months
3	Provider Name	[Provider AKA]	
4	Person Requesting Change	Organization Requesting Change	8 Months Since Update
5	Person Making Change	Organization Making Change	9 Official Updated
6	Change Description		
7	User Updating Provider	Provider Updating Provider	10 Date Provider Updated
3	Harmonia Gardens Shelter (4865)		2
4	Dolores Levi (2789)	Horace House (891)	4/25/11
5	Eamestina Money (3042)	Harmonia Gardens Shelter (4865)	1/25/11
6	Updated operating hours		
7	Hene Malloy (845)	Harmonia Gardens Shelter (4865)	
	Rudy House (2565)		

Diagram 2: Tab A – by Provider

- 1 The header section shows the title of the tab, as well as the age of the data in the report (taking the last ART warehouse build into account).
- 2 The top portion of the tab contains a key for interpreting the colored borders around each Provider.
- 3 This is the name of the Provider as chosen in the **AIRS Official Update**.
- 4 As entered in the **AIRS Official Update**, this is the person and organization who requested the last official update to the resource.
- 5 This is the person and organization who updated the resource, as specified in the **AIRS Official Update**.
- 6 This is the description of changes, as entered in the **AIRS Official Update**.
- 7 This is the user who last updated provider, and the organization he or she belongs to.
- 8 This is the number of months elapsed since the last official update to the resource.
- 9 This is the date of the last official update to the resource.
- 10 This is the date of the last update to the provider.

Dimensions Used: Provider, Provider AKA, AIRS Official Update Organization Requesting Change, AIRS Official Update Person Requesting Change, AIRS Official Update Organization Making Change, AIRS Official Update Person Making Change, AIRS Official Update Change Description, AIRS Official Update Date Officially Updated, Provider Audit Date Added, Provider Audit Date Updated, Provider Audit User Updating and Provider Audit Provider Updating, all from the Data Query.

Tab B – by Months Since Update (Diagram 3). This tab contains information on resource and provider updates, sorted into categories by time elapsed since last official update.

Resource Update Monitor by Months Since Update Category Current as of 6/23/11					
a. 0 - 3 Months					
Harmonia Gardens Shelter (4865)					
Dolores Levi (2789)	Horace House (691)			8	2
Earnestina Money (3042)	Harmonia Gardens Shelter (4865)			9	4/25/11
Updated operating hours.					
Irene Molloy (9483)	Harmonia Gardens Shelter (4865)			10	1/25/11

Diagram 3: Tab B – by Months Since Update

- 1 The header section shows the title of the tab, as well as the age of the data in the report (taking the last ART warehouse build into account).
- 2 Each section heading is in a bar color coded to show the number of months elapsed since the last AIRS Official Update.
- 3 This is the name of the Provider as chosen in the **AIRS Official Update**.
- 4 As entered in the **AIRS Official Update**, this is the person and organization who requested the last official update to the resource.
- 5 This is the person and organization who updated the resource, as specified in the **AIRS Official Update**.
- 6 This is the description of changes, as entered in the **AIRS Official Update**.
- 7 This is the user who last updated provider, and the organization he or she belongs to.
- 8 This is the number of months elapsed since the last official update to the **Resource**.
- 9 This is the date of the last official update to the **Resource**.
- 10 This is the date of the last update to the **Provider**.

Dimensions Used: Provider, Provider AKA, AIRS Official Update Organization Requesting Change, AIRS Official Update Person Requesting Change, AIRS Official Update Organization Making Change, AIRS Official Update Person Making Change, AIRS Official Update Change Description, AIRS Official Update Date Officially Updated, Provider Audit Date Added, Provider Audit Date Updated, Provider Audit User Updating and Provider Audit Provider Updating, all from the Data Query.

Tab C – Detail. This tab provides detailed information on Resource and Provider updates, as well as contact information for each Provider.

1	2	3	4	5	6	7	8	9	10
Provider Name	Parent Provider	Months Since Update	Official Update	County	Person Requesting Change	Contact Name	Contact Telephone	Contact Email	Contact Website Address
Harmonia Gardens Shelter (4056)	Horace House (891)	2	4/25/11	Westchester	Dolores Levi (2785)	Ernestina Money (3042)	(555) 555-5555	emoney@hgs.org	www.hgs.org
Rudy House (2665)	Horace House (891)	5	1/25/11	Westchester	Barnaby Tucker (3333)	Rudy Kellner (2099)	(555) 555-5555	rudy@rudyhouse.org	www.rudyhouse.org

Diagram 4: Tab C – Detail

- 1 The first column lists each **Provider** in the report.
- 2 The second column lists **Parent Providers**.
- 3 The third column shows **the number of months elapsed** since the last official update to the Resource. The cells are *color coded* according to the legend at the top of the report.
- 4 The fourth column shows the **date of the last official update** to the Provider or Resource.
- 5 The fifth column shows the **county** in which the Provider or Resource is located.
- 6 The sixth column shows the **person who requested** the last official update to the resource, as entered in the **AIRS Official Update**.
- 7 The seventh column lists the **name of the contact** listed for the Provider or Resource.
- 8 The eighth column shows the **telephone number of the contact** listed for the Provider or Resource.
- 9 The ninth column shows the **email address of the contact** listed for the Provider or Resource.
- 10 The final column shows the **web address** listed for the Provider or Resource.

Dimensions Used: Provider, Provider Parent Provider, AIRS Official Update Person Requesting Change, and AIRS Official Update Date Officially Updated from the Data Query. Contact Name, Contact Telephone Number and Contact Website Address from the Contact Query. Address County from the Address Query.

Tab D – Additional Information. This tab shows the variables that were queried, and summarizes the number of providers in each category of how recently resources were officially updated.

Resource Update Monitor Additional Information Current as of 6/24/11															
1	<table border="1"> <thead> <tr> <th>User Prompt Field</th> <th>Value Selected</th> </tr> </thead> <tbody> <tr> <td>Select Resource Group Name:</td> <td>Horace House (691)</td> </tr> <tr> <td>Select Provider Maintaining Name:</td> <td>none selected;</td> </tr> <tr> <td>Set Default Update Time Period (Months):</td> <td>12</td> </tr> </tbody> </table>	User Prompt Field	Value Selected	Select Resource Group Name:	Horace House (691)	Select Provider Maintaining Name:	none selected;	Set Default Update Time Period (Months):	12						
User Prompt Field	Value Selected														
Select Resource Group Name:	Horace House (691)														
Select Provider Maintaining Name:	none selected;														
Set Default Update Time Period (Months):	12														
2	<table border="1"> <thead> <tr> <th>Month Category Since Official Update</th> <th>Number of Providers</th> </tr> </thead> <tbody> <tr> <td>a. 0 - 3 Months</td> <td>1</td> </tr> <tr> <td>b. 4 - 6 Months</td> <td>1</td> </tr> <tr> <td>c. 7 - 9 Months</td> <td>5</td> </tr> <tr> <td>d. 10 - 11 Months</td> <td>23</td> </tr> <tr> <td>e. 12+ Months</td> <td>73</td> </tr> <tr> <td>f. No Official Update</td> <td>49</td> </tr> </tbody> </table>	Month Category Since Official Update	Number of Providers	a. 0 - 3 Months	1	b. 4 - 6 Months	1	c. 7 - 9 Months	5	d. 10 - 11 Months	23	e. 12+ Months	73	f. No Official Update	49
Month Category Since Official Update	Number of Providers														
a. 0 - 3 Months	1														
b. 4 - 6 Months	1														
c. 7 - 9 Months	5														
d. 10 - 11 Months	23														
e. 12+ Months	73														
f. No Official Update	49														

Diagram 5: Tab D – Additional Information

- 1** Shows what **values were queried** for each prompt.
- 2** Shows the total number of providers in each category of how recently resources were officially updated.

Dimensions AIRS Official Update Date Officially Updated from the Data Query.

Used:

TECHNICAL NOTES:

1. Either the “**Resource Groups**” prompt or the optional “**Provider Maintaining**” prompt has to have something selected (or else the report won’t return any data). However, the “**Provider Maintaining**” prompt has to have “**none selected**” if it isn’t being used. If both prompts are used, the report will return the union of the data (outer join): all the data that are collected by both the “**Resource Groups**” prompt and the “**Provider Maintaining**” prompt.

REPORT MODIFICATION

Users with ad-hoc ART licenses may wish to modify/customize this report to better suit their needs and purposes. When modifying an **Art Gallery** report such as this one, the user will need to make a copy of the original report into a different folder. This copy can be created either by using the “**save as**” feature or by clicking on the “**organize**” icon in folder view.

NOTE: The original unmodified version of this report is a template and is retained in **ART Gallery Templates** folder structure. These template folders are read-only and any reports must be copied to a location in the user’s site (**Favorites** or **Public Folder**) then mapped to the site’s data.

MAPPING OBJECTS

UNIVERSE: sp5_demo_art_2010_resource_point_u [ResourcePoint Universe]

This report is mapped to the **ResourcePoint** universe sp5_demo_art_2010_resource_point_u and should be copied to your **Public** or **Favorites Folder**, then mapped to the equivalent **ResourcePoint Universe** for your site (ex. *yoursite_resource_point_u*). Mapping can be done from the first query (**Data**).

QUERY NAME	FIELD NAME	LOCATION
Data	Provider	Provider/Provider
	Provider AKA	Provider/Provider AKA
	AIRS Official Update Organization Requesting Change	AIRS Official Update/ AIRS Official Update Organization Requesting Change
	AIRS Official Update Person Requesting Change	AIRS Official Update/ AIRS Official Update Person Requesting Change
	AIRS Official Update Organization Making Change	AIRS Official Update/ AIRS Official Update Organization Making Change
	AIRS Official Update Person Making Change	AIRS Official Update/ AIRS Official Update Person Making Change
	AIRS Official Update Change Description	AIRS Official Update/ AIRS Official Update Change Description
	AIRS Official Update Date Officially Changed	AIRS Official Update/ AIRS Official Update Date Officially Changed
	Provider Audit/Date Added	Provider Audit/Provider Audit Date Added
	Provider Audit/Date Updated	Provider Audit/Provider Audit Date Updated
	Provider Audit/User Updating	Provider Audit/Provider Audit User Updating
	Provider Audit Provider Updating	Provider Audit/Provider Audit Provider Updating
Provider/Parent Provider	Provider/Provider Parent Provider	
Contact	Provider	Provider/Provider
	Contact Name	Provider/Contact Information/Contact/ Contact Name
	Contact Telephone Number	Provider/Contact Information/Contact/ Contact Telephone Number
	Contact Website Address	Provider/Contact Information/Contact/ Contact Website Address
Address	Provider	Provider/Provider
	Address County	Provider/Contact Information/Address/ Address County