Resource Introduction

Wed, Jan 17, 2024 Resources

About the Resource Module

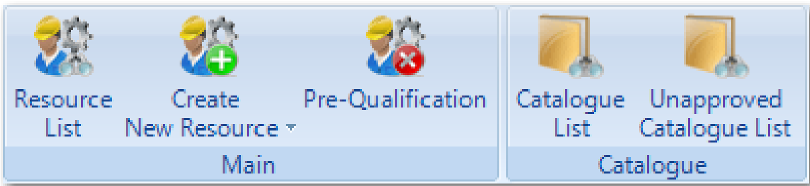
The Resources module is not only a data repository but is the source of data used throughout the system and is vital to the Helpdesk operation and to efficient Work Order assignment, expediting and escalations. It holds Resource specific information such as:

- Contact & Personnel Details (Multiple Contacts per Company including Escalation Contacts & Out Of Hours Contacts)
- Addresses
- Account Information (Including VAT Codes)
- Escalation Routes
- Scope of Activity by Work Order Type
- Rates & Availability
- Resource Compliance
- Document Upload

It also allows Users to view Catalogues and the items in it as well Approve/Reject Catalogue changes.

Resources can be either External (Contractors, Suppliers, etc) or Internal (Technicians, etc).

This is what the Resource module Action menu buttons look like:



Resource Actions:

Rates and Availability
Rates data is used to make decisions as to the urgency of the request based on cost, to benchmark resources, to increase accrual accuracy after attendance, and for validation of invoices. The rates are stored with dates logged against them. This enables accurate recording of costs against a Work Order if any changes in rates occurs, ensuring that the rate charged is the rate that was applicable on the day the Work Order was started and not the day the invoice was raised.

Rates data is presented in the helpdesk module prior to assignment; the reason for this is to allow for financial considerations to be taken into account alongside the urgency of attendance.

Resource availability data feeds into the helpdesk processes, allowing expectations to be set as to when the Work Order will be passed to a Resource and the Resource's availability for attendance to site, thus avoiding erroneous call outs. This is also used to highlight the application of Out of Hours rates and Non-Availability.

Add/Edit/View Documents
Used to add, edit or view any documents uploaded against the Resource.

Create Branch
Allows for the creation of a branch that is linked to a Head Office Resource record. Multiple branches can be raised against a single Head Office.

Create Internal (Tier 2)
Allows for the creation of an Internal Tier 2 Resource that is linked to an Internal Tier 1 Resource, much like an External Branch and Head Office. Multiple Tier 2 resources can be raised against a single Tier 1 resource.

Add/Edit/View Custom Data
Allows Users to enter additional information against a resource which may not fall into any of the pre-defined fields.

Pre-Qualification:
Used to list any resource that is added to the pre-qualification list.

Pre-Requisites for setting up Resources
The following information needs to exist in the system before Resources can be made:

WO Types, Sub-WO Types, and Equipment Types
Clients
Contact Types
Payment Terms

Catalogue Actions:
Catalogue List
Catalogues contain items relating to a Resource that has been setup as a Supplier. Users can open the Catalogue to see each item in the Catalogue and click an item to see the details of it.

Unapproved Catalogue List
This list displays all Catalogue changes that have occurred. Users can approve and reject the changes from this list.

Creating a Resource
Viewing/Editing a Resource
Resource Sub Menus
Pre-Qualification
Catalogue List
Unapproved Catalogue List

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