



# BUYERS GUIDE

VERSION 2.0



*Your partner in easy and efficient agency management*

## Introduction

<i>A program designed with family resource agencies in mind</i> .....	3
<i>Let's all work together</i> .....	3
<i>Designed to be flexible</i> .....	3
<i>Built on a solid foundation</i> .....	3
<i>What's next</i> .....	3

## ResourceAce Overview

<i>Standard Features</i> .....	4
<i>Security Features</i> .....	4
<i>Program Structure</i> .....	4
<i>Navigation Bar</i> .....	5
<i>Command Toolbar</i> .....	5

## ResourceAce Sections

<i>Dashboard</i> .....	6
<i>Drop In's</i> .....	6
<i>Families</i> .....	7
<i>Programs</i> .....	7
<i>Classes</i> .....	8
<i>Agencies</i> .....	8
<i>Staff</i> .....	9
<i>Survey Forms</i> .....	9
<i>Completed Surveys</i> .....	10
<i>Reports</i> .....	10
<i>Charts</i> .....	11
<i>Administration</i> .....	11

## Summary

<i>Putting time back in your hands</i> .....	12
<i>Customization is the key</i> .....	12
<i>Where to go from here</i> .....	12

### *A program designed with family resources centers in mind*

Welcome, and thank you for your interest in ResourceAce. ResourceAce is a data management system that has been created to help family resource and related social service agencies manage and report on the services they provide and families they serve. This document is intended to give you an overview of the features and capabilities of the ResourceAce system which after reading, we hope you'll see for yourself what a powerful and well rounded system ResourceAce is for managing these agencies.

### *Let's all work together*

By nature family service agencies address a wide a variety of needs with staff often specializing in particular areas. The primary focus of ResourceAce is to enable everyone at an agency to track their programs, families and services in a centralized, easy to use system that enforces data standardization and integrity. A common complaint for many agencies is how much time is wasted trying to find the data you need on a family or running a simple report on your family's progress. ResourceAce solves this problem by allowing quick and easy searches for all data entered into the system. In addition, by allowing the staff to work independently without having to rely on other people's knowledge of a particular case the agency will run more efficiently and function better as a whole.

### *Designed to be flexible*

ResourceAce is less a single software *program* in the traditional sense than it is a software *platform* that has been developed to help agencies address their challenges of data management for reporting on both families and the services they provide. With its modular structure agencies can utilize just those Sections that make sense for them today then use or add on other Sections as needed. The program can be adapted to each agency's unique requirements so the product fits the way the you work. Custom labels, reports and entry screens are just some examples of customizations which can be incorporated into the program to allow it to fit within your organization. With ResourceAce you not only get a program that will meet your immediate requirements but one that adapts to suit your needs as your agency grows.

### *Built on a solid foundation*

ResourceAce is built upon the FileMaker database platform which is the number one selling multiuser cross-platform relational desktop database today. This platform includes a number of highly useful features including PDF and Excel output that make it easy to share data with outside groups. One of the primary strengths of the FileMaker platform is that it's one of the very few database environments that is self contained and doesn't rely on multiple technologies to create and maintain a solution. Many other systems require a separate back end database, a separate front end data entry interface and usually a third party reporting utility to make a complete system. This architecture not only makes these system more costly but also more complex to maintain and alter as needed.

FileMaker based systems are built using a single source platform that is easy to use and maintain which keeps costs down and productivity up. ResourceAce can easily scale from 5 concurrent users all the way to 999 users making it ideally suited for family resource agencies of any size. In addition, the server has built in backup procedures which run as often as needed to insure that your data is always secure and restoration of data (if needed) is only minutes away.

When required, changes to ResourceAce can be made in real time while users are logged on the system allowing for immediate productivity gains resulting in greater efficiency and less down time. For these reasons and many others, you can be confident that there is no better platform in its price range that will yield faster, more stable and reliable results than a FileMaker based agency management system.

### *What's next?*

Now that you know about the nature of ResourceAce the following sections will cover in more detail the features and benefits of the program. Rather than cover every single feature and screen the program has to offer, instead we begin with a review of the standard features and then cover the main features of each Section including one example screen. By the time you are finished reviewing this document we hope you'll have enough information to make a decision if ResourceAce is right for your agency. We hope that it is and we look forward to working with you.

### What is ResourceAce?

As was discussed in the introduction, ResourceAce is a software program designed to allow family resource agencies keep track of their clients and services. It has been developed specifically to meet the day to day needs of workers in these kinds of agencies. Some of the issues that ResourceAce was created to address are:

- Enforcing standards of data entry
- Easy for staff to use and interact with
- Flexible system that can adapt to the changing needs of an agency
- Cost effective and a good value relative to other options in the marketplace.

ResourceAce has been built using a modular design which allows it to be configured for each agency's specific needs. Before reviewing the features of each Section the standard features available throughout the program will be covered next.

### Standard Features

Many of the standard features of ResourceAce are what set it apart from the competition and allow all users to benefit from the product right away. A number of these features can be see in the screen examples but are listed here to call attention to them. These features are:

- Consistent and **easy to use** interface
- Customizable Section navigation bar for each user
- Command toolbar at the top of each screen
- **All** lists and reports have the option to be saved as PDF files and then emailed if desired
- Audit trail to keep track of logins, record deletions, and field level changes
- Built in help screens and change request system
- **All fields** are searchable without restrictions
- **No** field length limitations for text based data entry

### Security Features

ResourceAce recognizes the need to keep your data secure and safe and has many standard features designed to address security related issues. These include:

- Restricted access to the administration area
- Customizable menu system to limit access to potentially destructive commands (i.e. "Delete all records")
- A username and password combination required for access with auto expiration of passwords if desired
- Customizable navigation toolbar to allow only authorized people access into certain areas.
- Restricted ability to delete records
- Each Section has an administer screen to restrict access to specific data fields on each record

### Program Structure

One of the most important aspects of any program is how it's organized. The ease of use of a program, or lack thereof is often directly related to how a program "flows" or is laid out. Some of key aspects to the overall structure of ResourceAce that leads to it's quick adoption and ease of use are:

- Logical organization of Sections and data entry screens
- "Web page" like navigation controls with left side navigation bar and horizontal tabs for quick access to data.
- Cross referencing of related data with "go" icons to quickly jump to related data
- Almost all commands are "on screen" eliminating the need to memorize command keys to perform simple or complex tasks.

ResourceAce is organized into separate sections that represent the different areas of responsibility or data collection at an agency. Each section has different screens (accessed by tabs arranged horizontally across the screen) containing the

different data fields that the user keys data into. The screens have been arranged in a logical fashion giving the user quick and easy access to a variety of information. Every section has at least one list view allowing for ad hoc reports and quick access to a range of searched data.

*Navigation Bar*

The navigation bar is how you move from one area of the program to another by clicking on the name of the section you wish to access. The section you are on will appear in red with white lettering but since the navigation bar can be customized for each person it may not appear the same for all users.

In those section where it's appropriate, blue arrows will appear at the top of the navigation bar which allow you to move you from one record to the next or to the first or last record in a set. If you have a scroll mouse you can use the scroll feature to move between records as well.

ResourceAce Overview



*Command Toolbar*

Another standard interface feature throughout ResourceAce is the command toolbar located at the top of every screen. This toolbar allows you to perform the most commonly needed functions such as Finding, Adding, and Printing records. The functions that are found in the toolbar will vary depending on the screen that you are on.

You will notice that not all the buttons on the toolbar are used on every screen and this is intentional so that when needed ResourceAce can be customized for your agency by adding special functions to the toolbar that you request. Above the toolbar is your agency logo, the name of the screen, and the program name to the right. When in find mode the screen name will be replaced with a message indicating that you are in find mode.



**ResourceAce Command Toolbar area**

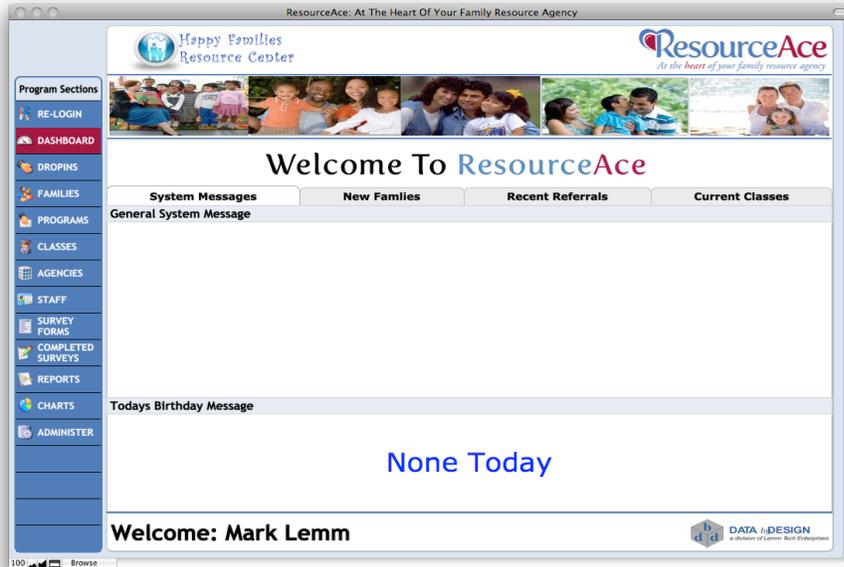
*Time To Take A Look*

Now that you know more about the standard features of ResourceAce it's time to take a look at some example screens. In the next section are examples from each of the different Sections along with a brief description and some key features of each one

*Dashboard Section*

This Section is where you start after you login to ResourceAce and serves to provide an overview of different areas of the system. With it you can:

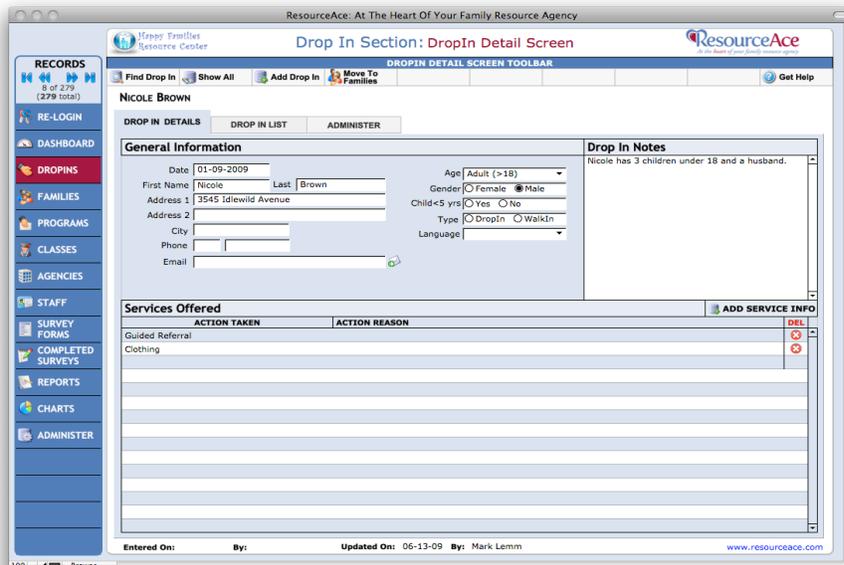
- Post messages to all users
- Display birthday messages for all staff
- Review new families, recent referrals and current classes being offered



*Drop In Section*

This Section is used to keep track of people who “drop in” and have had no prior contact with the agency.

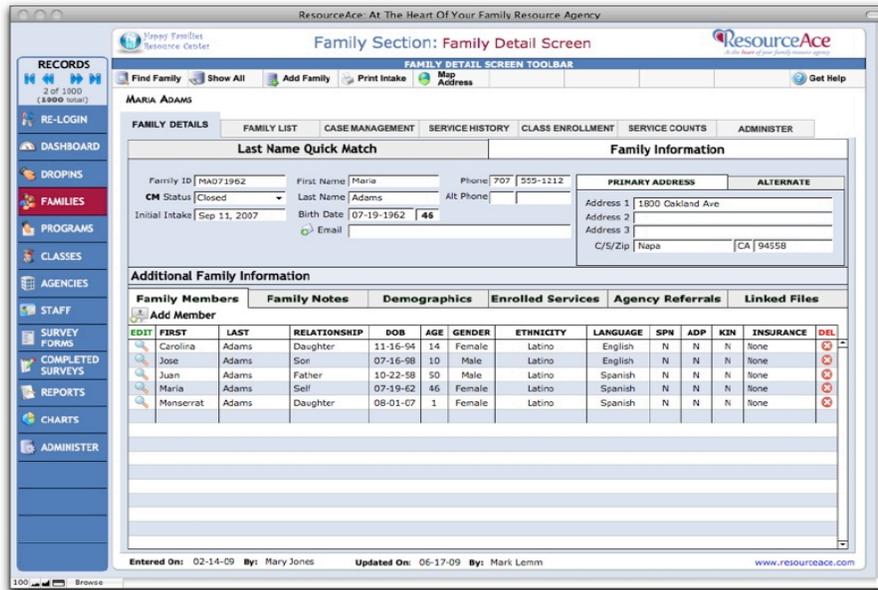
- Keep track of each person who just “drops in” to your agency
- Record essential information about each person
- Move their data over to the Families section with the click of a button



**Families Section**

This Section is the heart of the program and is used to keep track of all family demographics, case management details, and full service history. Some of the things you can do in this section include:

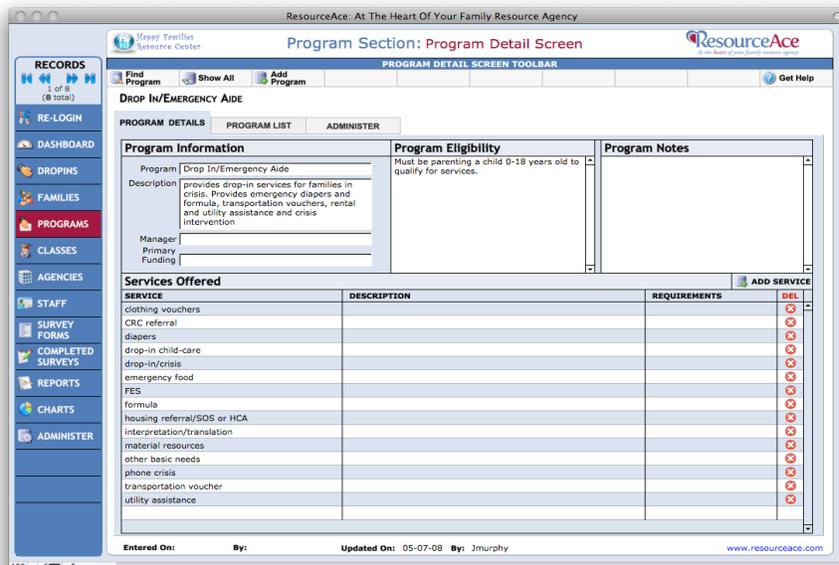
- Tracking all demographic information for each family and all their members
- Record all services, classes, and home visits for each family
- Print ad hoc reports and forms for each family



**Programs Section**

Every agency has a variety of programs and services that it offers. This Section provides an area to track all the details of those programs. This Section includes the following:

- Track all data related to your programs
- Track all services related to each program
- Used in Families section to assign families to programs and services.

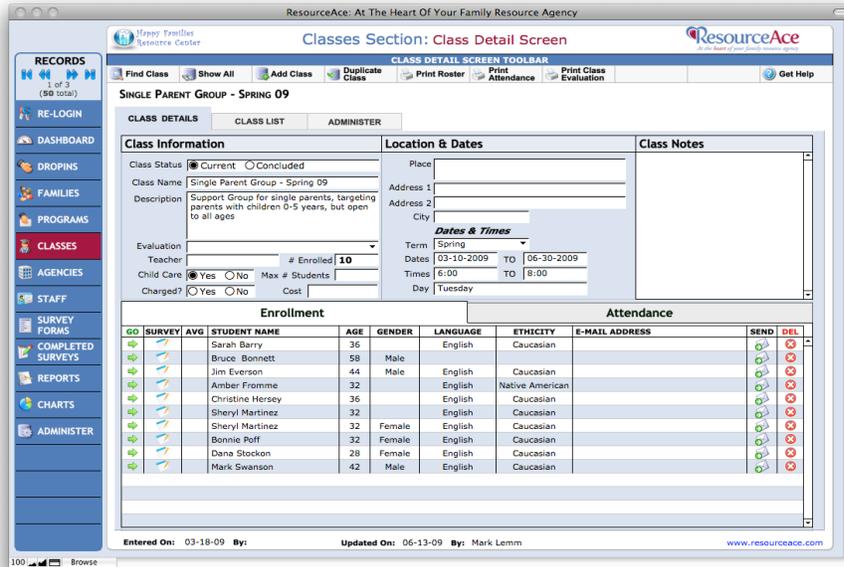


Classes Section

For those agencies that offer classes this Section provides that function. This Section has the following features:

- Track all data about your classes
- Print a live class roster for all families enrolled in a class
- Keep track of class attendance
- Record student surveys of each class

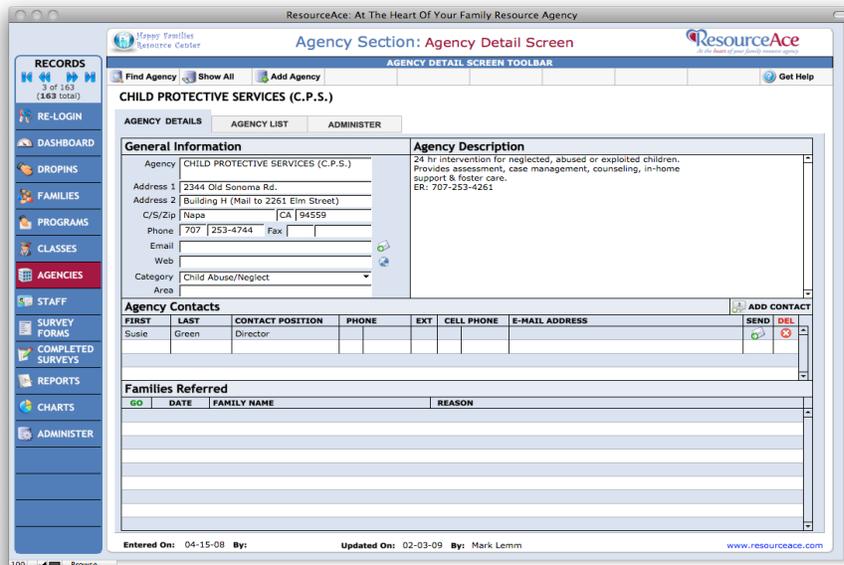
ResourceAce Sections



Agencies Section

The agencies Section is used to keep track of all the outside agencies that you may need to refer your clients to and includes the following:

- Track all data about third party agencies including contact information
- Includes live link to their website
- Shows referral history of all families to the agency



## Staff Section

This Section keeps track of your staff's personal information and will allow them to record their case management in of-ice hours if needed. This Section has the following features.

- Track all data about your staff including their photo
- Record the activity for the case management services they provide
- Print up to date staff rosters for your office or clients

The screenshot shows the 'Staff Section: Employee Detail Screen' for Mary Smith. The interface includes a sidebar with navigation options like RECORDS, RE-LOGIN, DASHBOARD, DROPPINS, FAMILIES, PROGRAMS, CLASSES, AGENCIES, STAFF, SURVEY FORMS, COMPLETED SURVEYS, REPORTS, CHARTS, and ADMINISTER. The main content area is divided into three tabs: STAFF INFORMATION, Case Management Activity, and Other Services Activity. The STAFF INFORMATION tab is active, displaying fields for Name (Mary Smith), Home Address (1000 Main Street), City/State/Zip (Napa, CA 94558), Home Phone (707-555-1212), Cell, E-Mail, DOB (08-21-2006), Birthday (09/08), Last Review (07-15-2008), Status (Current), Type (Full Time), Position (Office Systems Administrator), and Manager (Susan Griswold). A staff picture is shown on the right. Below the information fields is a 'Staff Notes' section. At the bottom, it shows 'Entered On: By: Updated On: 06-13-09 By: Mark Lemm'.

## Survey Forms Section

This Section is used to create survey forms to evaluate the effectiveness of your agencies programs and services. With it you can:

- Create an unlimited number of surveys on the fly
- Create as many questions as you want per survey
- Create up to three types of questions per survey (Before/After, Opinion, and Overall score)

The screenshot shows the 'Survey Forms: Survey Entry Screen' for a 'CLASS EVALUATION'. The interface includes a sidebar with navigation options similar to the Staff Section. The main content area is divided into two tabs: SURVEY INFORMATION and Survey Notes / Purpose. The SURVEY INFORMATION tab is active, displaying fields for Active (Yes), Name (Class Evaluation), Program (Parent Education), and Version (1.0). Below these fields is a 'Survey Questions' table with 8 rows. The first row is highlighted. The table has columns for #, QUESTION, TYPE, and DEL. The questions are:

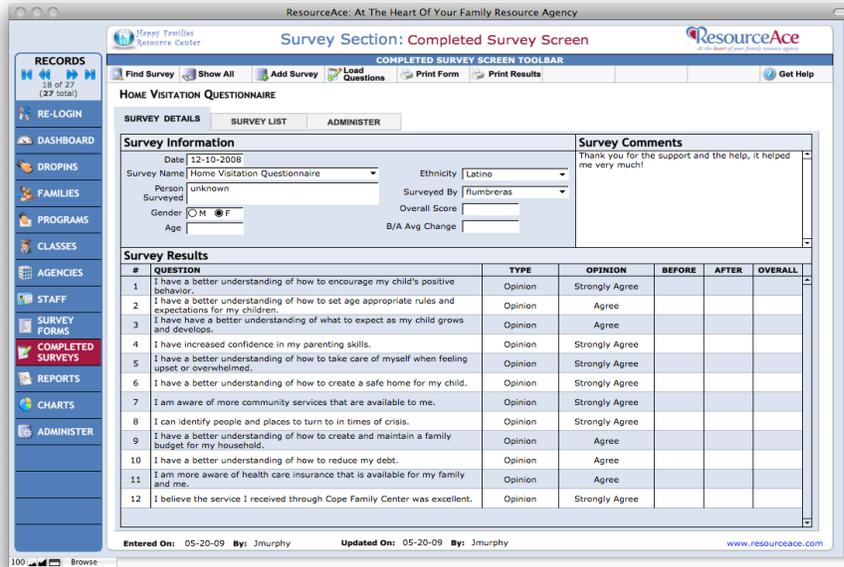
#	QUESTION	TYPE	DEL
1	I understood how my child was growing and developing.	Before/After	✖
2	I understood what was typical behavior for my child at his/her age.	Before/After	✖
3	I could identify what my child needed.	Before/After	✖
4	I could identify age-appropriate activities for my child(ren).	Before/After	✖
5	I knew how to respond positively to my child when s/he was upset.	Before/After	✖
6	I could correct and redirect my children without yelling or spanking.	Before/After	✖
7	I had confidence in my parenting abilities.	Before/After	✖
8	Overall I would rate this class	Overall	✖

At the bottom, it shows 'Entered On: By: Updated On: 05-20-09 By: Mwiggin'.

Completed Surveys Section

The completed surveys Section is used to keep track of all the surveys you have conducted on your various programs and services. There is one record per survey completed. With this Section you can:

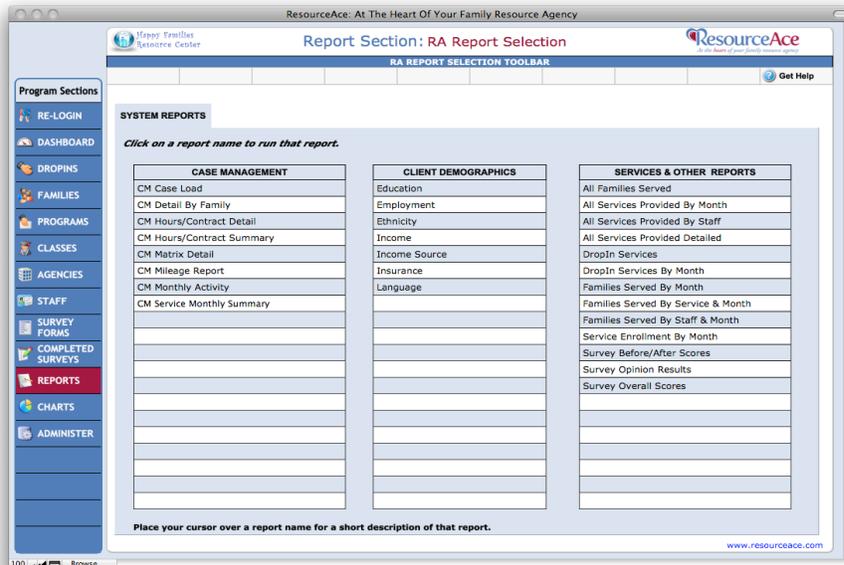
- Capture data from hand written surveys given to clients or families
- Record an almost unlimited amount of survey data
- Produce reports on the effectiveness of your programs and services



Reports Section

All the system reports are run from this screen and are listed alphabetically. Most reports are configured on a per installation basis according to your needs. This Section allows for:

- A centralized location from which to run all reports
- All reports can be printed or saved to PDF
- User customizable headers are available on all reports

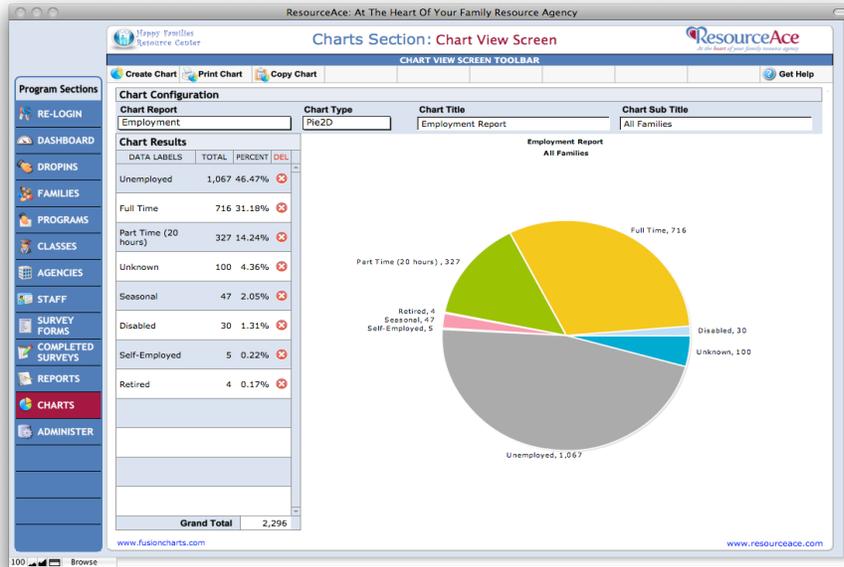


ResourceAce Sections

Charts Section

The charts section of ResourceAce is designed to allow you to display data from certain reports in a graphic way. The chart types currently available are: Area2D, Bar2D, Column2D, Column3D, Doughnut2D, Funnel Line2D, Pie2D, and Pie3D. With this Section you can:

- Create real time charts from selective reports on the fly
- Edit the chart title and value labels for each chart
- Print or copy chart to other programs for use in presentations

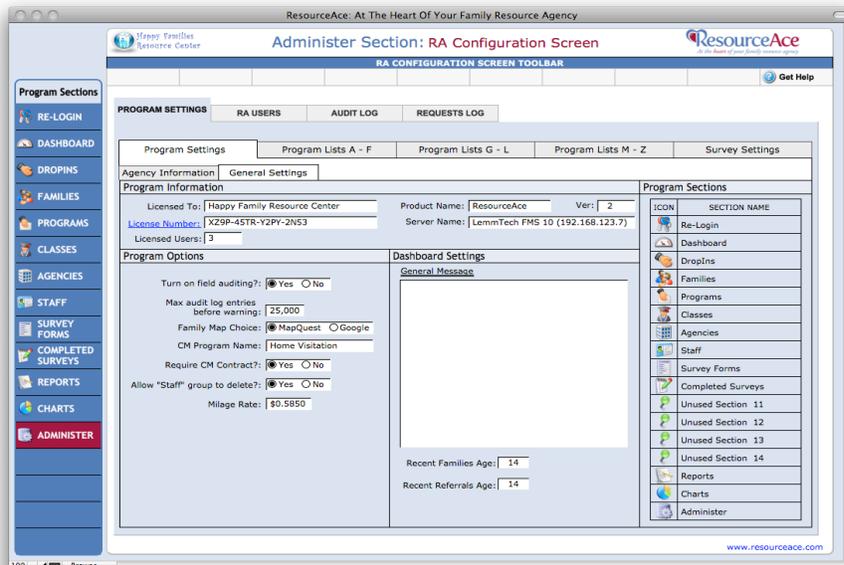


ResourceAce Sections

Administer Section

The administration section of ResourceAce is used to configure the program for your particular agency. This section is usually only accessed by the local database administrator and contains the following functions:

- Configuration of program settings and user accounts and access
- Storage of your agency's logo, name and address information
- Configuration of all necessary field lists throughout the program
- Access to the programs audit trail



### *Putting time back in your hands*

Thank you for taking the time to review this document. We hope you have enjoyed this overview of ResourceAce. With its easy to use interface, unlimited search capability, and focus on managing the data that family resource agencies need to track, ResourceAce aims to make each persons time on the computer more efficient and productive so they can get back to doing what they do best - helping people in need!

### *Customization is the key*

We work with your organization to make sure that ResourceAce fits your agencies specific needs. Indeed one of the strengths of the program is its ability to be customized. Its modular design allows for database sections to be added at anytime. Specific data fields and drop-down lists are easily configurable, since we know that no program can deliver exactly what you want right "out of the box". As a result, ResourceAce is the only program you'll need to run your agency easily and efficiently no matter what your size.

### *Where to go from here*

If you like what you have seen so far please contact us to schedule a web demo or to request additional information and pricing. We look forward to hearing from you and getting your agency started with ResourceAce.

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Summary