TECKNODE

***Empowering veteran caseworkers with essential tools and real-time data for effective support.***

A PERN-stack, SPA web app designed exclusively for Operation Stand Down RI

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Operation Stand Down RI

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A comprehensive list of features and requirements for an internal OSDRI staff dashboard/CRM, including installation instructions, staff resources, document management, IT support, and various operational procedures.

**Note: This site is for OSDRI Staff use only. This site does not and will not host any client-related PII or sensitive information!**

**Potential Data to Display, slowly working out how I will lay it out and display everything**

* Google Analytics Metrics → Website Statistics
  + Visits count, unique visits, most popular page, usage of forms
  + Check for the API availability or how to accomplish
* Google Search discoveries → Anyone Online Mentioning OSDRI, Awareness
  + Check for the API availability or how to accomplish
  + Anywhere out there on the web? This will grab search for those results…say every hour and display them.
  + Maybe give this a name or action name, like, “Launch probe”, “Recon”
* Google reviews - Latest, All
  + Check for the API availability or how to accomplish
* Visitor Kiosk Metrics
  + Will create my own API of course as will already be needed by the dashboard
  + Open Window button to show the current Kiosk screen
    - May want to use OBS as an output to ensure the correct monitor is always broadcasted reliably. May have the OBS constantly on and just make adjustments Live on air.
  + Open visitor kiosk
    - In case staff member wants to pre-check their client in or simply view it
  + Show stats
    - Visitors today, registrations today, amount of each
    - List of who has visited today and stats about their last visit and what services they are coming for
  + Dashboard
    - Visitor log
      * Visitor log page, today’s visitors widget
      * Edit a visit by clicking name, clicking name displays past visits+notes
      * All view, today view, past week view, all views will at minimum display Unique visitors, Amt of visits and New visitors/registered
    - Register a new visitor for service usage
      * Register page
    - Search visitors (search works for all info)
      * Search page, search widget
      * Clicking user displays options such as [update user details] [show/edit recent visits]
    - Add a visit
    - Update user details
    - Export data
      * By date range
      * Predefined date ranges:
        + Past 24hrs
        + Past 7 days
        + Past Month (30 days)
        + Past 3 Months (quarter)
        + Past Year
        + All
* Events
  + Outreach
  + VAE
  + BOTG
  + Gala
  + Game Dinner
  + Golf Tournament
  + White River Rafting annual trip details
  + FLYERS! And other printables
* Volunteer opportunities coming up
  + List of volunteers, may have to pull from charityproud…
* Fantasy Football wall…and recent winners over weekend/past week, updated on certain day every week
  + Fantasy Football - OSDRI Hall of Fame
* OSDRI Manual Latest
  + View online which has download capability later
  + Download now
  + Version number, date, marked prominently
* Onboarding Docs
  + W2 Docs
  + EIN number
* Local Resources to fill the gaps we can’t fill with the grants
  + Street sheet
  + Furniture Bank - for furniture donations
  + Matthewson street Methodist church - for clothing donations
  + Office of Veterans Services - for general questions about veteran benefits and burial benefits
  + NEHOV
* VA Disability Documents
  + comp pen exam prep
  + PACT ACT
  + Various other printouts
* VA Programs Contact Lists
  + Trailer 37
  + Other VA Social Workers
* [OSDRI.ORG](http://OSDRI.ORG)
  + Main website link, button somewhere accessible
* Business Cards
  + Pick name from drop down maybe?
  + Then instantly display whatever name so only one is shown at a time…what the purpose is idk but it feels right? lol
  + Reorder/Edit Business Cards Request Form, Update Bio on website, Update legal name
    - Can be similar form to one that has a person ask to update their Bio or their Name on the website or just combined into one
* Supply order request form
  + Goes to Caitlyn, makes it clear and easy to get the correct supplies approved and ordered through Caitlyn
* List of OSDRI Vehicles, plates, reg no, trailer registrations
  + Useful for some staff like facility maintenance, some managers
* SSVF Veterans Rights notice
  + This can go somewhere under client resources or something
* Pantry Notice, food certification expiry + countdown
  + Maybe a centralized Food pantry page with current needs, what were low on, do we need folks help in there or are volunteers showing up, volunteer contact information for common volunteers, longer volunteer list that allows for cold calling so to speak witht heir permission, this is a list that is already goiing somewhere possibly in charityproud already
* Front Desk Operations
  + Etiquette
  + Pantry Limits
  + How to use the kiosk
  + How to deal with threats, physical or on the phone
  + Clothing Donations, policy of New clothing only, used clothing may be placed in the white clothing bin outside behind the food pantry trailer, who to call when this is full- LINDSEY knows
* OSDRI MEDIA KIT
  + Logos
  + Handouts and Generic Flyers, outreach
  + Colors we use
* OSDRI Internal News, possibly in ticker format + section
  + Employee shout out board
  + Fantasy Football
  + Section for department heads to put up
* NARCAN Safety Sheet, how to administer
* Where/how to order more: osdri bags, donation receipts, rent receipts
* List of veteran owned businesses, local veteran owned businesses, list of restaurants and stores for veterans day, business card wall
  + Where should staff be patronizing? Help spread the word to clients. Help boost awareness of the business and its veteran owned status. Boost awareness of businesses good deeds and past involvement.
  + Business card wall, display cards that have been left with OSDRI staff
    - Can start with the ones at the front desk and any that can be retrieved anywhere, have it in collage format as different orientations and shapes are to be expected
    - How would this be displayed, I suppose as its own page? Under what category I dont know
* “How do I get to OSDRI?” - Handout or instructional detailing exactly where the Johnston office is with minimap
  + Maps of properties, floor plans/layouts
  + Addresses of other properties, how many units each and what type of units they are and male or female or family
* Recent food dropoff shoutouts and pictures, listing of previous, sortable by time of dropoff
* Separate but connected app: External secured pay portal for clients to make rent payments and another system for Lindsey or the property manager to manage who is paying their rent and when and how much
  + Client will have easy to use portal with past invoices or whatever they are called for rent
* Local weather element displayed in top bar, have it default to 1010 or toggle from 1010 to newport or auto-detect
* Latest Printable Phone Directory
  + By Last Name (default)
  + By Department, departments have different colors maybe, departments are grouped together names
  + By Hire Date, probably wont get approved to do this lol
  + Organization list combined with phone roster #s
* Front Desk operations, how to use the phone, how to respond, threats, legal calls all go to x135
* Spam calls + Emails, how to identify spam threats, how to deal with them
  + Common spam / scam calls
  + Common email tactics
    - How to identify phishing emails
    - How to respond to phishing emails - DONT, delete.
* WiFi Networks and their passwords for each property
  + OSDRI Secure
    - For staff usage at 1010
    - Shared drive access
    - Printers access
  + OSDRI Guest
    - Printers access? Verify
    - For client usage at 1010
  + OSDRI Event
    - Primarily used during the Stand Down / Veteran Assistance Event
    - Covers the parking lot to the Chalet, most of the property
* Success story submission, elements displayed to download waiver paperwork for potential success story clients
  + Jotform for success story submissions via staff
  + Basic video waiver, printable and digitally filable/signable.
* Tutorials for Outlook, Teams, VPN, Neos Addin, etc
  + VPN
    - What is it, When to use it, How does it work
    - Using it at home and abroad
    - Troubleshooting tips
  + Neos Add-In for Outlook
    - What is it?
    - Where do I access it?
    - How do I tag an email to a case in Neos?
    - Do attachments get tagged as well? (yes, right? verify.)
    - Missing? Installation instruction
  + Teams
    - What is it? Instant messenger mixed with Zoom-like capability
    - Is it required?
      * Legal, yes, otherwise no unless told different by Supervisor
    - Is it required to have it on at all times as in on my phone? No.
    - How do I use it?
    - Can and How do I transfer files to a coworker with teams?
    - Making calls with teams
    - Setting up and attending team/conference calls through Teams
* Encryption guide and best practices
  + Communicating PII
  + Communicating with the VA
  + How to use, Making sure all text, signatures and attachments have been made before encrypting
  + Company-company email ([osdri.org](http://osdri.org) domains) are automatically decrypted
* IT Support - General
  + Steve’s Windows Shortcut Cheatsheet Printable
    - People often ask me how to do things with their computer and I often call out keyboard shortcuts as their repetitive use will result in faster more efficient work.
  + How to take a screenshot
    - How to use the screenshot tool
    - Recommended alternative: Lightshot
      * How to use Lightshot
  + My computer is slow
    - Utilities and guide to cleaning up the PC that are built in
  + My batter gives me an error at boot (old laptops)
    - Simply bypass it by pressing enter until a new machine becomes available
  + How do I adjust my monitor arms, they are starting to sag and they wont stay up!
    - Guide written by me, with correct tool outlined for Huanano

**Front Desk / Kiosk Ops**

**Client Payment Portal and Property Management System**

This will facilitate digital payment capability for OSDRI housing clients. A backend will also be developed wherein the property manager can monitor and manage everything they need.

* Client Portal Features
  + Accessed via [OSDRI.org](http://OSDRI.org), possibly a button in the top left or top navbar.
  + Digital payment submission
    - Via payment gateway, unsure which as of now. ~3% fee
    - Receipt provided, printable
  + View payment history
  + Download printable rent receipts
  + Update contact information
  + Rules and Conduct information
  + Rental documents and proof of residency
  + Payment reminder signup form (can be set to remind them by text or email at whatever interval they choose)
    - Date - Text field
    - Payment Reminder? - Checkbox
    - 1 week, 3 days - Radio Buttons
  + Maintenance Request form (for non-emergent needs) → Lindsey, Rock, George
    - Date - Text field (autofilled)
    - Unit - (autofilled)
    - Problem: - Large text field
    - Emergency? (examples of what constitutes emergency) (notify who to contact if its dire, disable form (toggleable))
* Property Manager Backend
  + Accessed either from the client portal itself (somewhat hidden away) and/or from TeckNode Intranet and/or Direct Link
  + Track rent payments and due dates
  + Disable, delete, enable, or add clients
    - Adding clients will present a fixed dropdowns depending on exact placing of client, for example if they select chalet, okay there are four units in the chalet, the first one is open, assign them to that room in the system. something similar to this would be ideal, maybe a visual floorplan to help manager visualize where people are exactly in the property
  + Generate printable payment reports for individual clients
  + Manage maintenance requests
  + Send manual or automatic payment reminders (overrides the user control)
* [ ] Verify legal requirements for digital payment processing
* [ ] Research secure payment gateway options
* [ ] Understand that all payment gateway options require some loss of rent, typically/ideally <3.0%
* [ ] Create user documentation for payment portal for clients and staff

***AI’s Thoughts:***

Based on the information provided above for the client payment portal system, here are additional considerations to consider:

**Security & Compliance:**

* Data encryption and secure storage of payment information
* User authentication and access control for both client and backend users

**User Experience:**

* Mobile responsiveness for easy access from any device
* Clear error handling and user feedback for payment processing
* Accessibility features for users with disabilities

**Integration & Technical:**

* Integration with existing accounting systems
  + Quickbooks integration! Research their API, if any
* Backup and disaster recovery procedures
* System monitoring and performance optimization

**Administrative Features:**

* Comprehensive reporting and analytics tools
* Audit logging for all transactions and system changes
* Role-based access control for staff members
  + Only one managerial/admin account will be active for simplification

**Support & Documentation:**

* Help documentation and FAQs for users
* Customer support system for payment-related issues
* Staff training materials and procedures

**Administrative Resources**

For organizational policies, forms, and internal procedures

**Staff Operations**

Day-to-day operational guides and procedures for different roles

**IT & Technology**

Technical guides, tutorials, and support resources

**Facilities & Properties**

Information about OSDRI locations, maintenance, and facilities management

**Communications & Media**

Brand assets, communication guidelines, and media resources

**Client Resources**

Tools and information for client support and services

**Community & Partner Resources**

Information about local resources, partnerships, and veteran-owned businesses

**Document Library**

Important forms, manuals, and documentation

**Employee Engagement**

Internal news, recognition, and social activities

* Fantasy Football

**Safety & Security**

Safety protocols, emergency procedures, and security guidelines

* Spam/Scam emails
* Spam/Scam calls
* Threats
* Building security protocols
  + Threat identification
* Emergency evacuation procedures
  + ?
* Incident reporting guidelines
  + Talk to your supervisor.
* Access control and visitor management
  + Visitors are permitted in the two reception areas as well as the guest bathroom
* Security camera system operation
  + Only certain people have access, approach your supervisor with your concern first and if necessary, camera footage can be reviewed
* After-hours security measures
  + PIN pad for Lock/Unloock codes
* Personal safety guidelines for staff
  + Driving clients around, taking care of their kids
* Emergency contact numbers and protocols
  + Johnston Police
  + Johnston Fire
  + Erik Wallin

**Local Veteran Organizations**

Staying informed about other veteran organizations' programs and approaches allows us to better understand the local, broader Veteran support landscape and identify opportunities to enhance our own services. This awareness helps us make appropriate referrals when we cannot directly assist veterans due to grant limitations, while also possibly providing valuable insights for our program development.

* A table of services provided for reference with OSDRI at the top. This may make our organization seem less equipped but really the services we do provide are top-notch, albeit slightly limited.
* The table will have services at the top and providers on the left with OSDRI at the top of course.
* Regular updates to reflect changes in services and contact information for each organization
* Color-coding system to indicate service availability and waiting times
* Direct contact information for veteran service officers at each organization
* Special program calendars and event schedules from partner organizations
* Success metrics and outcomes data for different services when available
* Feedback mechanism for staff to report changes or updates to listed services
* Integration with mapping service to show locations of various organizations
* Quick reference guide for emergency services and crisis intervention resources