US DEPARTMENT OF LABOR





IT Trax User's Guide

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Introduction

As the technological needs of Job Corps evolve, Job Corps Centers and Agencies may need to initiate projects to expand or to gain new capabilities. IT Trax is an application designed to automate the process of creating, tracking and reporting on Information Technology projects requested by Job Corps customers.

For users at Centers and Agencies, IT Trax provides an interface for initiating IT project requests and for obtaining real-time information on the status of those requests as they are processed.

For Regional and National users, IT Trax provides a centralized location for holding requests and information related to the requests, and it provides a structured framework for moving requests through the processes of approval and implementation.

Contacting the JCDC

There are numerous ways to get assistance with IT Trax and all CDSS applications. First is calling the Technical Assistance Center (TAC).

The TAC can be reached 7:00 AM - 7:00 PM, Central Time at **1-800-598-5008**, Option #2 (phone) or via fax: **(512) 804-2012**. Also, you can email the TAC at helpdesk@jobcorps.org (email outside the network).

On the JCDC training Web site (http://training.jobcorps.org), you can find the following resources:

- General overview of the CDSS Suite of Applications
- General overview of each application
- Hardware requirements
- Training information for each application
- FAQ section for each application. You can find questions and answers concerning each application in the CDSS Suite of Applications. Updates are posted weekly, so check back often for more information.

User ID Request Forms are available from the Forms Web site (http://forms.jobcorps.org).

IT Trax Requests

Overview

IT Trax manages IT Project Requests from Job Corps Data Center customers, including Job Corps Centers, OA/CTS providers, Regional or National Office Staff and Center Operators. These projects require an approval and funding process, and are implemented by the Data Center once approved and funded.

IT Trax Project Requests may be generated for many different types of projects. There are three functional areas under which requests may fall: Telecommunications, Software Development, and Security. Examples of each are given below.

- Telecommunications projects are primarily concerned with the Job Corps Network. Additions of cabling, access devices, LAN configuration, requests for hardware, such as network switches and PCs, and provisioning of additional bandwidth are all examples of Telecommunications Projects appropriate for IT Trax. Any telecom project designed to add new hardware or to expand the capabilities of the network should be submitted via IT Trax.
- Software Development projects appropriate for IT Trax are those that require significant design changes to the CDSS Suite of Applications, such as major function enhancements and requests for new applications. Minor software enhancement requests and problems with existing functionality are more appropriately directed to the HelpDesk/TAC.
- IT Trax Security requests may be either technical or policy-related. Examples of technical security requests include reconfiguring a firewall to allow access to a specific application, or a request to change an access list on a VLAN to prevent unauthorized access to the Job Corps network. Security requests also include issues related to Job Corps security policy, such as ensuring that all Job Corps employees are in compliance with the Job Corps end-user agreement, or responding to requests from authorities for email records, or providing guidance to JCCs and OA/CTS providers in regards to Job Corps IT security policies.

Note that although, in some cases, actual implementation of the project might be carried out by a third party under the supervision of the Job Corps Data Center, the National Office and the Office of the Inspector General consider the JCDC responsible for the security and operation of the Job Corps private network and for devices that attach to the network. In order to meet these responsibilities the JCDC must have technical approval for all solutions implemented on the network.

Roles

IT Trax is available to senior staff, such as POCs and Center Directors, for the purposes of making IT requests and for checking on the status of those requests. A user ID and password for accessing IT Trax may be requested from the JCDC using the IT Trax User ID Request Form, available from the Job Corps Forms site at http://forms.jobcorps.org.

IT Trax supports three different user roles, assigned when the ID is requested. Each role has different purpose and a different level of access to project requests. When you request a user ID, you must specify which IT Trax role you will require.

Role	Description
Requestor	This role is intended for Center and Agency staff who initiate project requests. Requestors are able to create new project requests, check the status of their requests, generate reports, and add notes to projects.
DOL Manager	This role is intended for Regional Project Managers who need to review project requests and guide the requests through the approval and implementation process. DOL Managers have all the capabilities of Requestors, plus the additional capabilities of editing existing project requests and adding information like cost estimation, project timeframes, and the funding sources for projects.
JCDC Technical Team	This role is intended for members of the JCDC Technical Team who need to review project requests, design solutions, and create cost and time estimates for projects. Technical Team members have access to all areas of IT Trax and may perform any function.

Approval Process and Status Codes

IT Project Requests follow a procedure for approval. The Status field on the request indicates which stage of the approval process the project is currently in.

The general stages of an IT Project Request are:

- 1. Request initiated
- 2. Initial approval by Region
- 3. Solutions design, cost estimate, and deployment timeframe by Data Center Technical Team

- 4. Approval by Region
- 5. Requestor and/or Region secure funding and issue Purchase Order to vendors
- 6. JCDC manages project to completion

The possible values of the Status field of a project reflect this process. These values are given in the table below.

Project Status	Description
Pending Regional Initial Review	The request has been entered into IT Trax, and is waiting for Regional staff to make a preliminary approval assessment. New IT Trax project requests are automatically assigned this status.
Pending Technical Team Review	The request has been given initial approval by Regional staff and is waiting for the Data Center's Technical Team to develop a solution, which includes cost and time estimates.
Pending Regional Review	A solution, including cost and time estimates, has been developed by the Technical Team, and the request is waiting for an approval decision from Regional staff.
Pending Funding	The project request has been approved by the Region, but funding for the project has not yet been located.
Funding Approved	The project request has been approved, and funding has been located. The next step is implementation by the Data Center's Technical Team.
Work in Progress	Implementation of the project is currently underway.
Completed	The project has been completed.
On Hold	The project has been placed on hold. See the project notes for information on who placed the project on hold and why.
Rejected by Region	Regional staff rejected the project request, either at an initial stage or after the cost and time estimates from the Technical Team. Consult the project notes for the details.
Rejected by Technical Team	The Technical Team rejected the request. Consult the project notes for details.
Rejected by National Office	The Technical Team rejected the request. Consult the project notes for details.

Notifying Staff When Changes Are Made

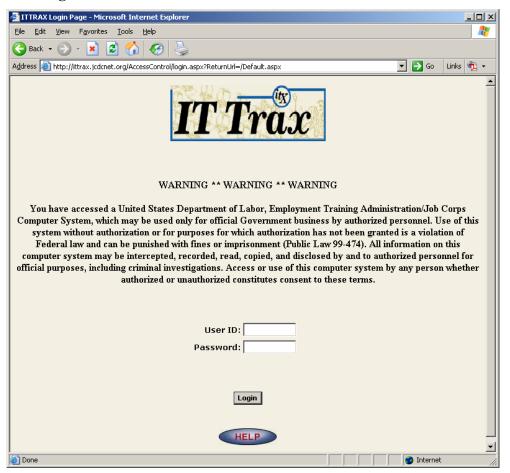
Though IT Trax provides a central location for storing and tracking IT Project Requests, the application does not notify staff when a project is added or updated. The staff involved in the project request are responsible for notifying the appropriate staff members when a request is added or when important material is added to a project request.

Using IT Trax

Launching IT Trax

You may log into IT Trax from any computer in the Job Corps network by entering this URL into Internet Explorer: http://ittrax.jcdcnet.org.

Once the IT Trax application opens, enter your IT Trax user ID and password and click **Login**.



Using IT Trax Outside the Job Corps Network

IT Trax is not available from the Internet. Users who are outside the Job Corps network should launch IT Trax by using Internet Explorer from their Citrix Desktop.

Creating an IT Trax Project Request

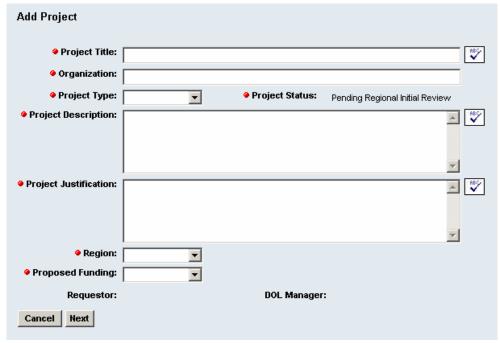
To create an IT Trax project request, you must first gather the following information:

- A complete description of the project requirements. This description should be written in terms of the desired end result rather than in terms of a specific solution. For example, "We need twenty new network connections in classroom 3A," is better than, "We need a Cisco WS-C2948G for our classroom."
- A justification stating the need for the project. The justification should focus on the benefit that the requested functionality will provide for the Center, and what problems the functionality will solve.
- A proposed funding source. This may not necessarily be the final funding source.
- The name and contact information for the project requestor. This person will be the main point of contact when questions arise during the approval process.
- The name and contact information of the DOL Regional Project Manager (Regional PM) for your Center or Agency.

After this information is gathered, Launch IT Trax and follow these steps:

1. Click **Add Request** from the IT Trax menu

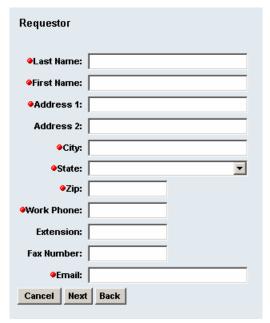
2. Enter project information into each field of the Add Project window. Note that all fields are required. In the text fields (Title, Description, and Justification) you may cut and paste text from existing documents.



Fill in all fields with the project request information

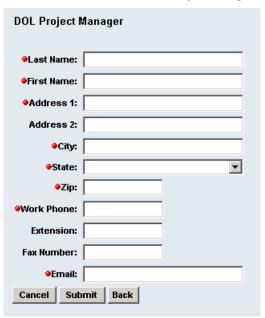
3. Click Next.

4. Enter contact information for the project Requestor. This person will be the primary point of contact for Regional, National, and JCDC staff when questions arise during the project approval process.



Enter all required information for the requestor

- 5. Click Next.
- 6. Enter contact information for your Regional Project Manager.



Enter all required information for the Regional PM

- 7. Click **Submit**. You will be returned to the Edit Project window, where you may edit any fields of your request if necessary. Note that the Project ID and Request Date fields have been automatically populated for you.
- 8. If you make any changes to your request, click **Submit** to record them.
- 9. When you are satisfied with your project request, click **Done**.
- 10. Click **LogOff** to end your IT Trax session.



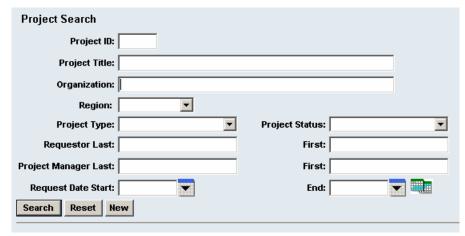
Click LogOff when finished

11. Notify the appropriate staff that the project has been created. For Center staff, the appropriate contact would usually be the Regional Project Manager.

Locating an Existing IT Trax Project Request

To locate an existing project request, log into IT Trax and follow these steps:

1. Click **Search Request** from the IT Trax menu. The Project Search interface will appear.

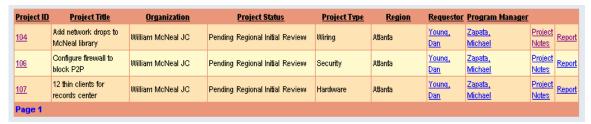


The Project Search interface allows you to locate existing project requests

2. In the Project Search window, you may use various criteria to locate your project request. The most straightforward method may be to enter your organization's name in the Organization field, which will retrieve all projects for your Center or Agency.

Search capabilities include:

- In text fields, you may enter just the first characters of a value to match the rest of the text. For instance, entering "Add" in the Project Title field locates all projects where the Project Title begins with "Add."
- The percent sign (%) may be used as a wildcard to match zero or more characters. For instance, entering "%library%" in the Project Title field will locate all projects with the word "library" anywhere in the title.
- If more than one search field is used, the application will return any projects that match *both* criteria. For example, entering "Add" in the Project Title field and selecting **Dallas** as the Region will locate all project requests from the Dallas Region (or from Centers or Agencies in that Region) where the Project Title begins with "Add."
- 3. After the search criteria have been entered, click **Search** to locate matching project requests.
- 4. When the search results appear, you may choose your project from the results table. If more than 20 projects match your criteria, you may use the page navigation links in the bottom row to move from page to page. Clicking on any header will sort the projects based on that column.



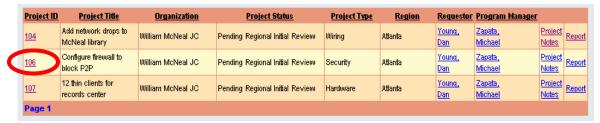
Search Results are displayed in a tabular format

Using Search Results

After locating your project in the table of search results, you may edit the project request (if you have permission to do so), view or add project notes, or generate reports. Each of these activities is discussed in the sections that follow.

Edit Project Request

Clicking the **Project ID** link will display the Edit Project window, allowing you to change the information describing the project.



Clicking the Project ID number (if enabled) will allow you to edit the project request

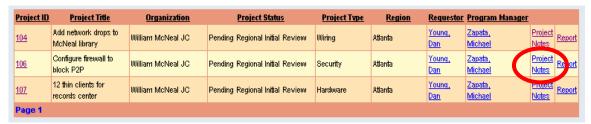
Note that this link may be either enabled or disabled, depending on your IT Trax role and the status of the project, as follows:

- Requestors may edit their project requests as long as the status of the request is **Pending Regional Initial Review**. Once the Regional staff have performed an initial review of the project request, the Requestor may add project notes, but may not edit the request itself.
- DOL Managers may edit any project request unless the status has been set to:
 - Rejected By Technical Team
 - Rejected By National Office
 - Work In Progress
 - Completed
- Members of the JCDC Technical Team may edit any project request regardless of status.

Note Though in some cases, Requestors and DOL Managers may not have permission to edit the project request definition fields, they are always able to add project notes to a request.

View or Edit Project Notes

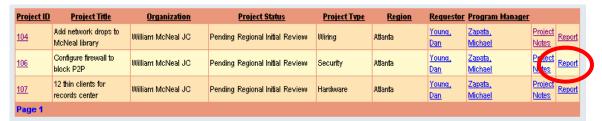
Clicking on the **Project Notes** link will display the Project Notes window, allowing you to view existing notes for this project or add new ones. Details on using Project Notes are given in the Adding Notes to an IT Trax Project Request section of this manual.



Click Project Notes from the search results table to edit Project Notes

Display a Report

Clicking on the **Report** link will display the Project Detail Report for the selected project. An example of this report can be seen in the Checking the Status of an IT Request portion of this manual.



Click Report from the search results table to view a detail report

Checking the Status of an IT Trax Project Request

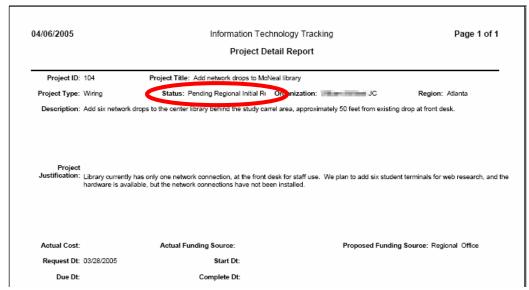
You may check the status of an IT Trax project request at any time. As a project request moves through the approval processes, its status is typically noted in two ways:

- The Project Status field is updated to reflect the request's current stage of processing.
- Project Notes are added to hold comments by personnel involved in the approval and implementation process.

To check the status of an IT Trax project request, log into IT Trax and follow these steps:

- 1. Click Search Request.
- 2. Enter search criteria and click **Search**.

3. Locate your project request and click **Report**. A Combined Project Detail and Notes report will appear in a PDF window. You may print this report or save it in electronic format. The first page of this report shows the project request, including its current status. The second page of this report is a summary of the project notes for this project. If there are no notes attached to this project request, the combined report will only contain the first page.



The status of the project is given on the first page of the report



The second page of the report shows the notes that have been entered (if notes exist)

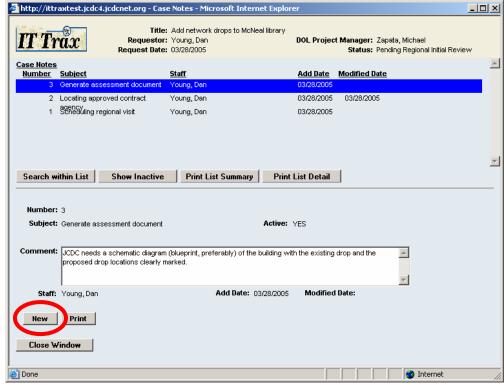
Adding Notes to an IT Trax Project Request

IT Trax Project Notes are used to append information onto project requests and to document the history of the request as it moves through the approval and implementation process. Notes may be entered by staff members, and a note is also automatically generated when someone changes the status of a project.

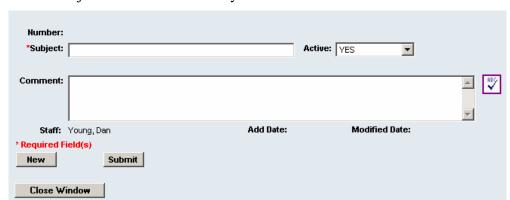
Note Job Corps staff members involved in your project are not automatically notified when you add a note to an IT Trax Project Request. If the note is significant to the decisions being made about the project request, you may wish to contact the Job Corps staff involved to let them know that a note has been added.

To add a note to an IT Trax project request, log into IT Trax and follow these steps:

- 1. Click **Search Request**.
- 2. Enter search criteria and click **Search**.
- 3. Locate your project request and click Project Notes. A window will appear showing all existing notes for the selected project.
- 4. Click **New** to create a new note.



Click New to create a new project note



5. Enter a subject for the note and add your comment.

Enter information into the Subject and Comment fields

6. Click **Submit** to save the project note.

Tip If you need to change a note after it has been entered, you may select the note and make changes as long as (A) you are the original author of the note, and (B) no other notes have been entered since yours was created.

Using IT Trax Reports

IT Trax generates two types of reports: detail and summary.

- A detail report includes detailed information about a single project request. You would use a detail report to view information about a particular project.
- A summary report provides a condensed list of all projects that match
 particular search criteria. You would use a summary report to view all
 projects for a particular Center or Region, for instance, or to view all projects
 that were initiated before a given date.

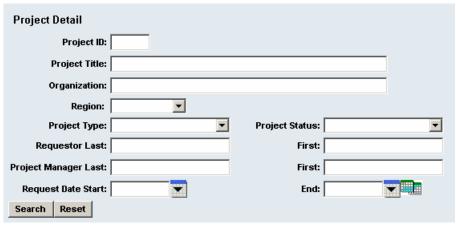
Instructions for generating these reports are given below.

Detail Report

To generate a Detail Report for a project request, log into IT Trax and follow these steps:

1. Click **Reports** to open the Reports menu.

2. Click **Detail**. A Project Detail search interface will appear.



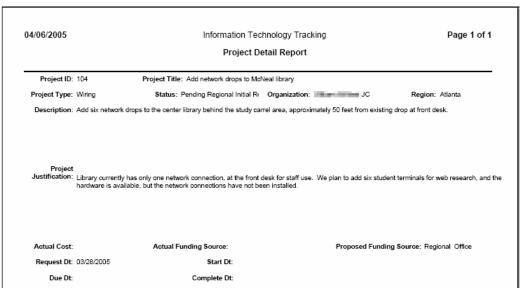
The Project Detail search interface is identical to the Search Request interface

- 3. Enter search criteria and click **Search**.
- 4. Locate your project request in the results table. You may click **Project Details** to view the detail report for your project, or you may click the Project

 ID Number to view a Combined Project Details and Notes report.



Click on the ID for a Combined Report, or Project Details for a Detail Report only

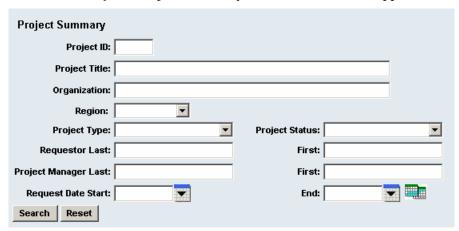


Example Detail Report

Summary Report

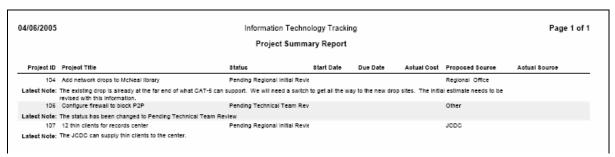
To generate a Summary Report, log into IT Trax and follow these steps:

- 1. Click **Reports** to open the Reports menu.
- 2. Click **Summary**. A Project Summary search interface will appear.



The Project Summary search interface is identical to the Search Request interface

3. Enter search criteria and click **Search**. A PDF window will appear showing a list of all project requests that match your criteria. This report may be printed or saved.



Example Project Summary Report

DOL Manager Role

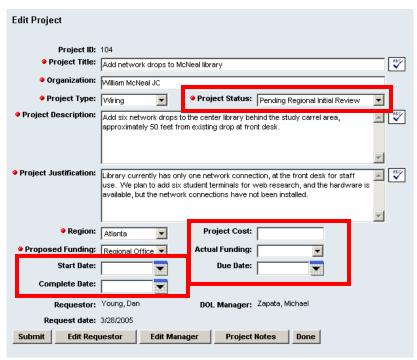
The DOL Manager role in IT Trax has all the capabilities of the Requestor role, including creating project requests, finding the status of project requests, and adding notes to projects. Refer to the other portions of this manual for information on performing these tasks. Additionally, the DOL Manager has the capability of changing the status of requests, editing existing requests, and entering some request information that Requestors may not.

Requestors may not edit project requests after the status of the request has been changed from **Pending Initial Regional Approval**. DOL Managers, however, may edit any project request unless the status has been set to:

- Rejected By Technical Team
- Rejected By National Office
- Work In Progress
- Completed

When editing a request, DOL Managers may edit certain fields that Requestors may not:

- Project Status (a project note will automatically be generated when this changes)
- Start Date
- Complete Date
- Due Date
- Project Cost
- Actual Funding



DOL Managers may enter information in fields that Requestors do not have access to.

Note Remember that IT Trax does not automatically notify staff when an IT Project Request is updated. You will need to contact the staff involved in the project when significant changes are made.