FCMT Admin Help Guide

Abstract

This admin help document was created to provide an overview of administration tasks to support the FCMT application. FCMT is a web application shared among several VBA and VHA programs, initially built for FRCP. Initially, Service Member information is transferred from VADIR, a Department of Defense personnel record system, to FCMT during the client registration process. Additional information is added to FCMT by users depending on their program requirements and information available from the client engagement.

Because the FCMT application will undergo scheduled enhancements through the year, this document is not finalized and should always be considered in a draft state. Users should refer to this document to better understand the layout of the FCMT process and how the application maps to each business data element. This will improve consistency in FRCP data entry and usage of the application. Unless systematically enforced, users should familiarize themselves as well with the business and management processes which ultimately govern this process.

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Introduction

The Federal Recovery Coordination Program, a joint program of the Departments of Defense and Veterans Affairs, helps coordinate and access federal, state and local programs, benefits and services for severely wounded, ill, or injured Service members, Veterans, and their families through recovery, rehabilitation, and reintegration.

The FCMT application is a web-based Microsoft platform developed specifically to support the FRC Program and will be extended to support related programs and processes in the future.

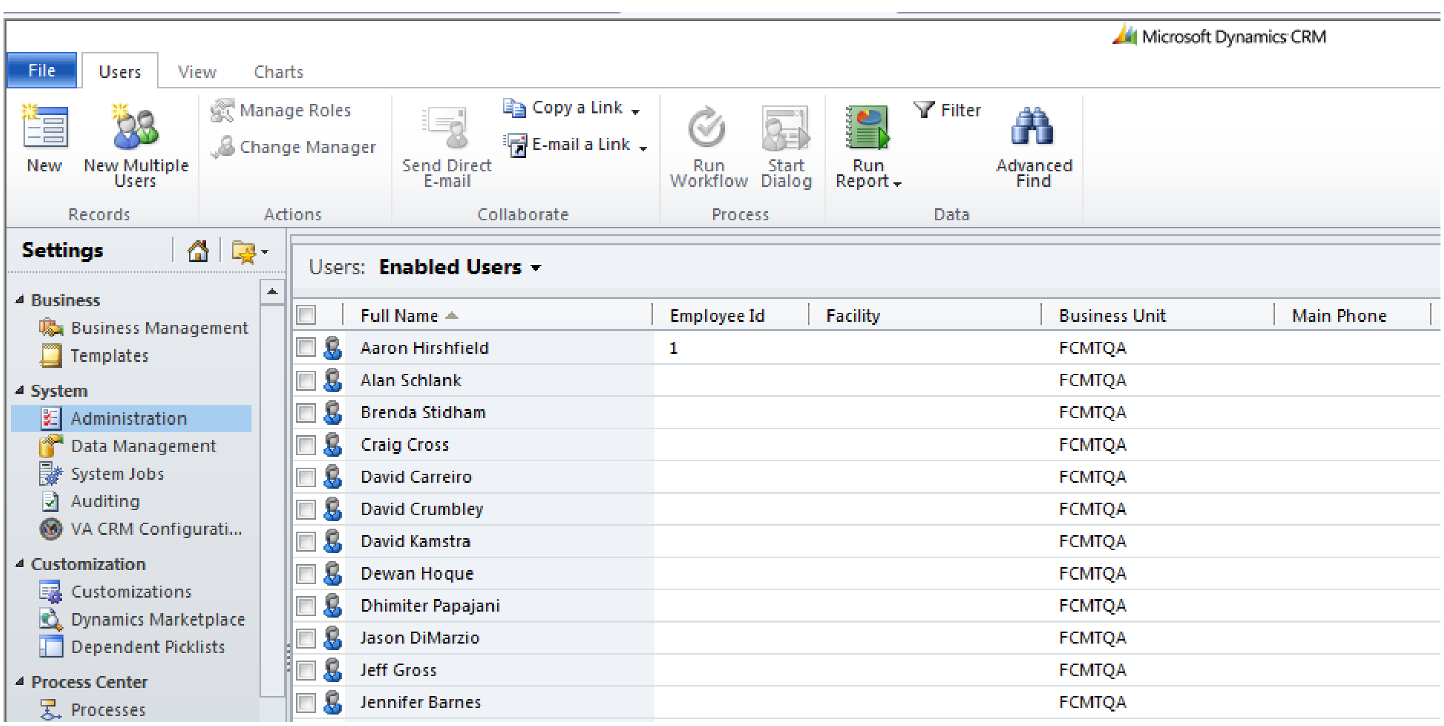
Although there are security roles setup in the system for specialized tasks such as maintaining users and creating new picklist values, most users have the same security level and can view and modify all transactional records in the system (Case, Contacts, Clients, FIRPs, Medical Information.) The only exception is the Assist which only allows edit rights to the FRC Assigned.

FCMT Application Administration

User Administration

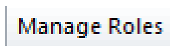
User Creation

Use the list of user records to add, edit, enable, and disable users, to assign security roles, and to change managers for a user.

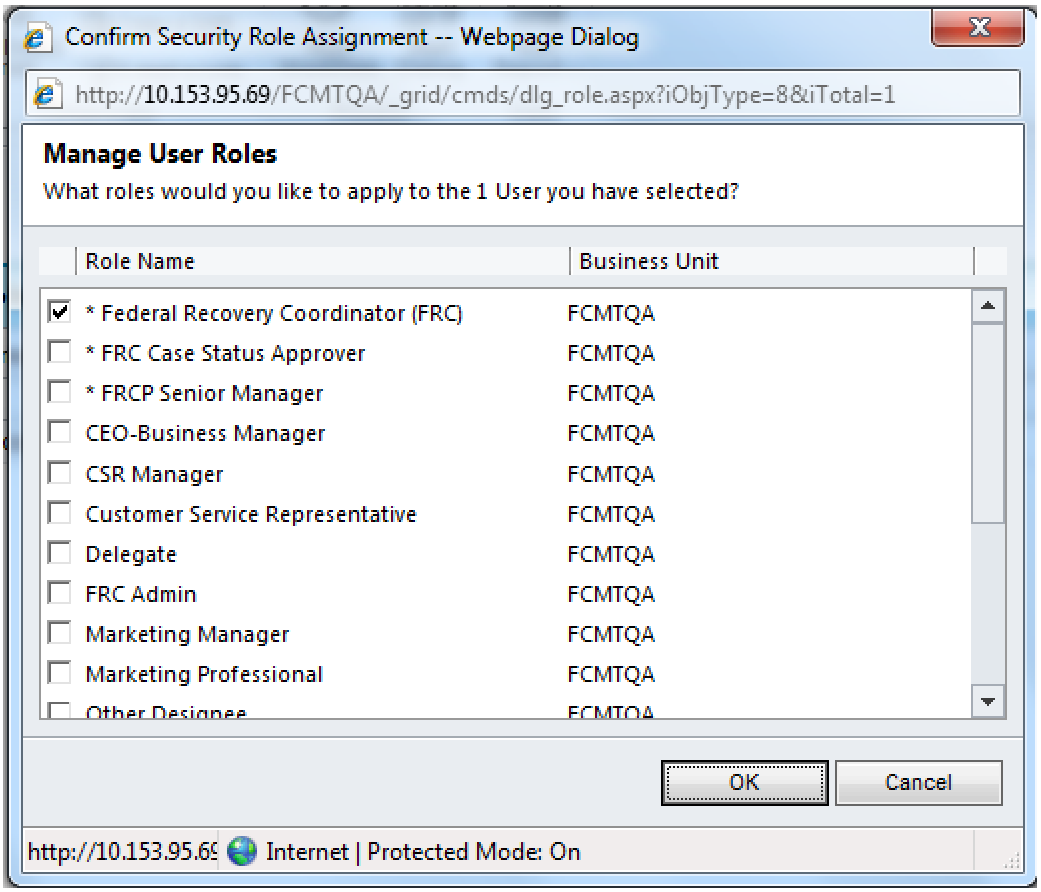


Create a new user.

1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **Users**.
2. On the Actions ribbon, point to **New** button**.** A new User record opens.
3. First enter the Active Directory user logon name. (*domain\userid*) Tab past this field and the system will look up this user's Active Directory credentials. Users must have an Active Directory account setup by IT prior to performing this step.
4. Fill out the appropriate information.
5. Save the record by pressing the **Save** button 

Security Roles cannot be added to an unsaved User record.
6. Navigate to the Security Role view on the left navigation area.
7. Click on the **Manage Roles** button 

8. Check off the appropriate Security Role or Roles for this user. (See the Security Role section below for descriptions)

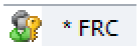


9. Click the **Ok** button.

Manage User Security Roles

The FCMT application has the following Roles which for user security. These Roles are additive so if a user has Role 1 and Role 2, they are allowed to do everything included in both Roles. The “base” Role in FCMT is the “* Federal Recovery Coordinator (FRC)” Role. All users must have this base Role.

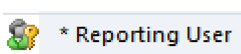
FRC



Security Rights:

1. Cannot delete any entity data
2. Can deactivate the following:
    a. Summary Notes
3. Can Create, Read and Edit the following:
    a. Contact
    b. FIRP Task
    c. Workload Activity Log
4. Can Read and Edit the following:
    a. Client
    b. Assist
    c. Case
    d. Medical Information
    e. FIRP Tasks
    f. Activities including:
        i. Task
        ii. Summary Note

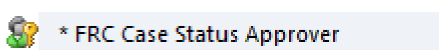
Reporting User



Security Rights:

1. Can run reports
2. Can export data
3. Can print

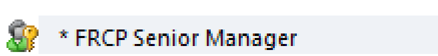
FRC Case Status Approver



Security Rights:

1. Can approve Case status changes

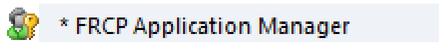
FRCP Senior Manager



Security Rights:

1. Can Reassign Clients and their related records

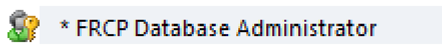
FRCP Application Manager



Security Rights:

1. Can edit User Roles

FRCP Database Administrator



Security Rights:

1. Can Assign User Roles
2. Can Edit User Settings
3. Can Create, Edit and Deactivate FIRP Task Library
4. Can Create, Edit and Deactivate Facilities

Enable/Disable Users

You can disable a user's record to prevent the user from being able to access of the application platform.

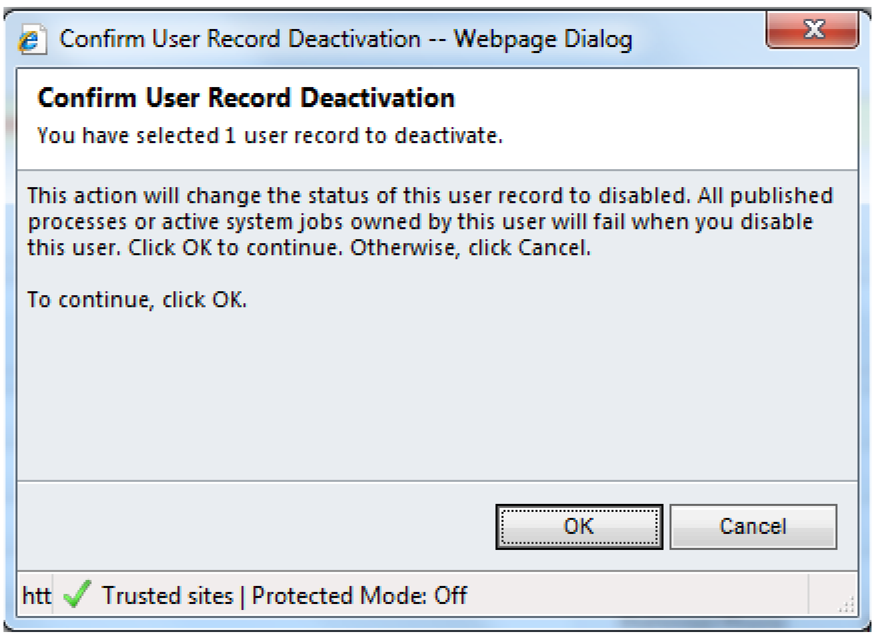
In the Navigation Pane, click **Settings**, click **Administration**, and then click **Users**.

Enable User Record

1. Click **Disabled Users** in the view drop-down list.
2. In the list of users, select the user records that you want to enable.
3. On the **Record Management** tab, click **Enable** button Enable
4. In the confirmation message, click the **OK** button.

Disable User Record

1. Click **Enabled Users** in the view drop-down list.
2. In the list of users, select the user records that you want to disable.
3. On the **Users** tab, click **Disable** button Disable



4. In the confirmation message, click **OK**.

Note

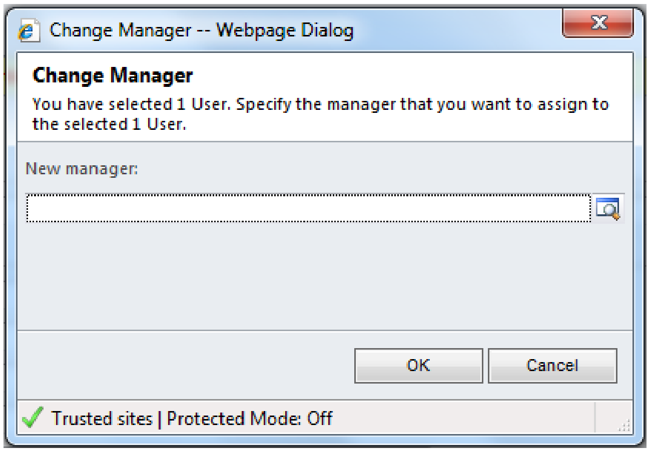
If you select a user record that is already enabled and follow the steps to enable it, the user record remains enabled.
If you disable a user record and that user is the owner of a workflow rule or active system job, those system jobs may fail.

Assign User Manager

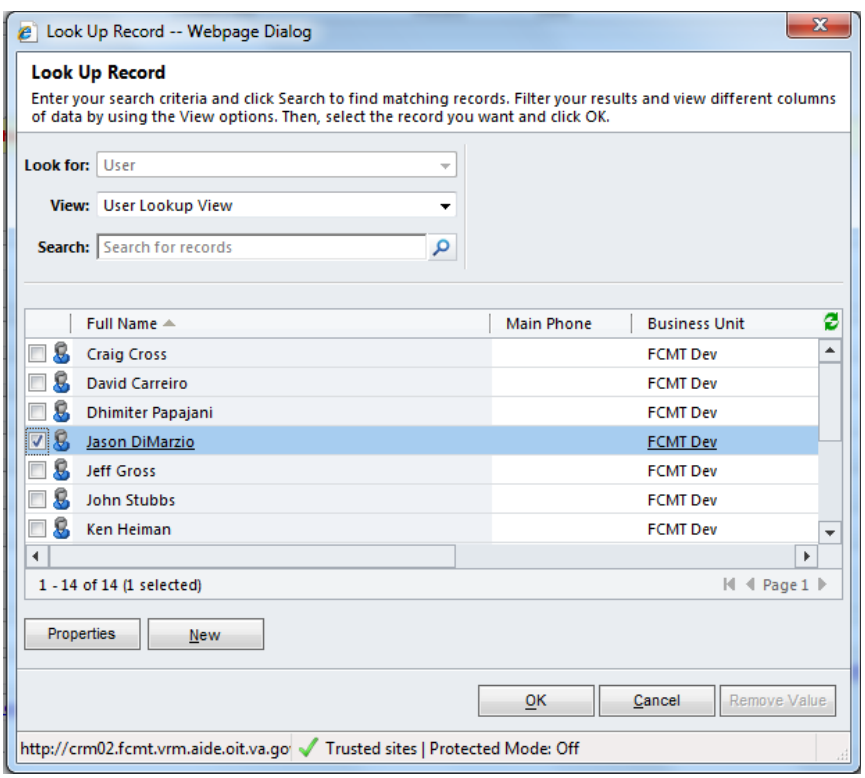
Each User can be assigned a single manager from their same business unit. Tracking the manager in the application will provide the ability to create views of a manager's user's records and to facilitate automatic emails regarding FRC performance.

1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **Users**. Select the User to update and double click the record to open it.

2. In the ribbon, click on the **Change Manager** button 



3. Click the **Lookup** button  to find and select a manager.

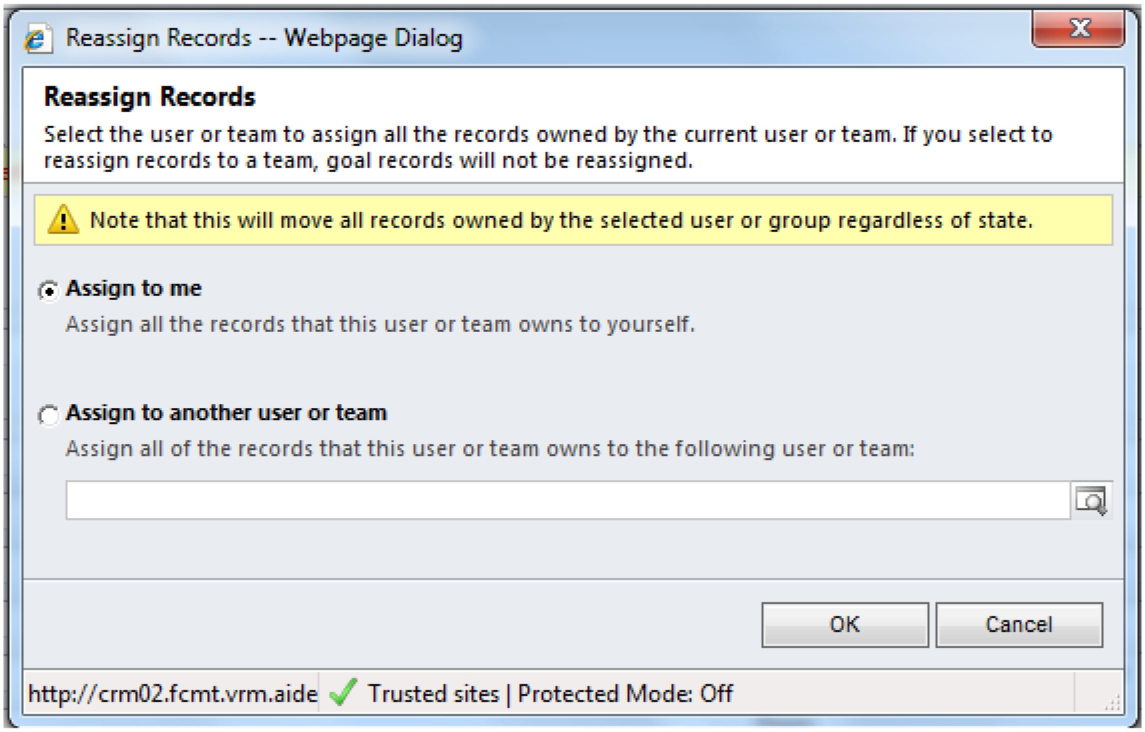


4. Click the **Ok** button

Reassign User Records

In situations where either an employee is leaving the business and has unfinished caseload or where management determines that the caseload needs to be shifted between FRC users, reassignment may be necessary.

1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **Users**.
2. In the list of users, select the user that you want to reassign their records. Open the record by double clicking on the record.
3. Click the **Reassign Records** button  in the ribbon.

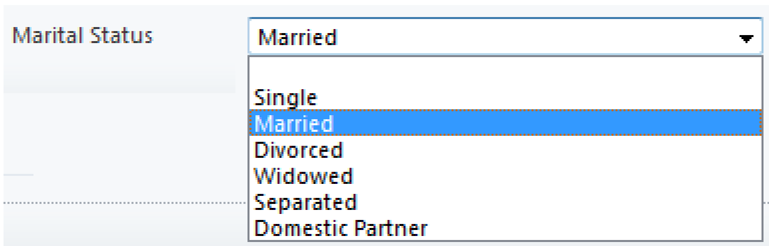


4. Choose the user who will be assigned all of the User's records and click the **Ok** button.

Application Picklists, Lookup Fields & Custom Controls

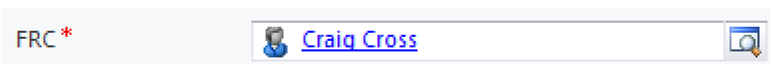
A picklist is a distinct list of simple values displayed on forms in the system. As an example, the Marital Status field is a picklist because it contains a simple list of different statuses. Picklists are configured using the system development tools and cannot be managed by administration. Changes to these fields must be submitted as an FCMT application enhancement.

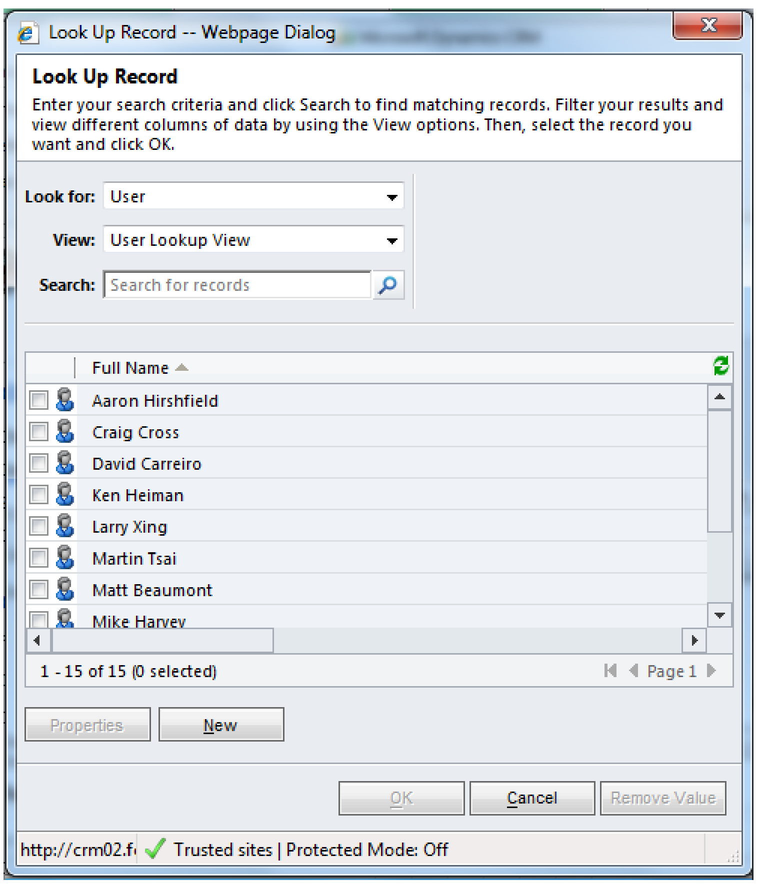
Picklist 



A Lookup is a special picklist where the value a user choosing is specific to a distinct record in the database instead of a single value in a list. As an example, the assigned FRC would be added to a form using a Lookup because an FRC has many other pieces of information associated to it and is stored as a record in the database.

Lookup 





Some record types in the system can be created and maintained by users. These include:

Locations

Community Agencies

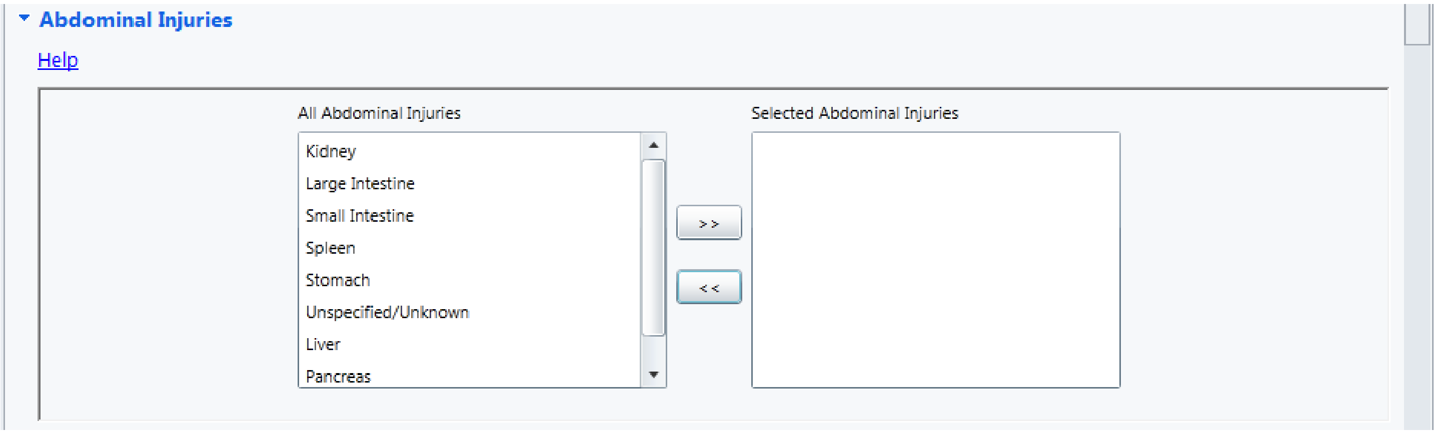
Alternatively, there are certain Lookups that are maintained only by administration and cannot be edited, added or removed by FRC users. These include:

FIRP Task Library

Workload Activity

Medical Treatment Facilities

There are also custom Silverlight controls created to allow easy data entry for the user. These controls contain lists of values as well and some can be edited by administration.



These include:

Abdominal Injury

Chest Injury

Comorbidity

Fracture

Inhalation Injury

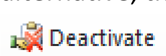
Medical Diagnosis

Psychological Diagnosis

Types of Care

To add values to these lists, go to Settings and choose the appropriate view to see a list of available values. Click on the record to make modifications. Click the Add button to create new entries.

Deleting & Deactivating Records

The business rules prohibit deletion of data and users are restricted from this action throughout the system. As an alternative, the system allows users to deactivate data by choosing a record and clicking on the Deactivate button 

in the ribbon menu. Deactivation is a “soft delete” whereas it removes the record from most views and reports but can be easily retrieved by selecting the record type’s “Inactive” view. Records that have been deactivated can be easily re-activated if necessary as well.