

Administrator Tasks					
What needs to be done	Where	Who	What information is needed first	Who has info	App
Create Roles for each Application to be used	Security Wizard	SA	<ul style="list-style-type: none"> System pages needed for each role Org staff structures Best to create standards first, they can be adjusted later		All
Assign Page Permissions for each Role (use Control & Menu Permissions if needed)	Security Wizard	SA	<ul style="list-style-type: none"> Knowledge of system pages Org staff structures Best to create standards first, they can be adjusted later		All
Create Region(s)	Security Wizard	SA	<ul style="list-style-type: none"> Consensus on how to set regions 		All
Create Organizations (in the correct Region)	Security Wizard	SA	<ul style="list-style-type: none"> List of legal Org names and which regions to assign them 		All
Assign Roles to Organization (Use Unions if assigning to multiple Organizations at once)	Security Wizard	SA	<ul style="list-style-type: none"> Which Applications will be used by each Org 		All
Create Local Administrators for each Organization	Security Wizard	SA	<ul style="list-style-type: none"> Name of person who will be the Org LA 		All
Assign Reports and Adhoc Views for each Application	Security Wizard	SA	<ul style="list-style-type: none"> Which reports are needed by each Org and application 		All
Create Users	Web Tool	SA	Can create a generic user for each Org		All
Update Dropdown defaults	Web Tool	SA	<ul style="list-style-type: none"> Standard Names for Programs and Activities These will need to be changed in the system to be available here		All
Create Program templates	Web Tool	SA	<ul style="list-style-type: none"> Consensus on Program setup among Orgs (next 6 steps) 		All
Copy Program to Org	Web Tool	LA	<ul style="list-style-type: none"> Program Name Standard Name Program Dates Focus Code Question Code for Entry 	Program Director	All
Check/modify Program Components	Web Tool	LA	<ul style="list-style-type: none"> Structure of Program 	PD	All
Check/modify Funding Codes	Web Tool	LA	<ul style="list-style-type: none"> Which Contract(s) pay for each Activity 	PD/Financial Officer	All
Check/modify Activities	Web Tool	LA	<ul style="list-style-type: none"> Which page Activity should use Activity Name used by Org Standard Name Question code if Profile 	PD	All
Check/modify Milestones	Web Tool	LA	<ul style="list-style-type: none"> Milestones to be used by Program Target 	PD/Outcomes Director	All
Check/modify Milestone descriptions, verifications, forecast	Web Tool	LA	<ul style="list-style-type: none"> Milestone information 	PD/OD	All
Export Program	Web Tool	LA or SA	<ul style="list-style-type: none"> Which Program(s) to export to which database 	SA	All

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Create Dropdowns	System section	SA	Consensus on Items including: <ul style="list-style-type: none"> Standard Names for Programs, Program Components, Activities Type Of Org (Locations Page) Contract Type, Funding Source, Funding Area Contract Code Contact Type (For Contracts) Program Question Code and Standard Name 	Executive Director or PD	All
Create Investor Targets and Performance Measures NR	System section	SA	<ul style="list-style-type: none"> National Indicators/ROMA Goals/ Funder requirements This can be done later, but make sure LAs know to do Contract and Milestone link then, too	PD	All
Create current Poverty Level	System section	SA	<ul style="list-style-type: none"> Local & national figures for whichever types of Poverty Level will be used by group (AMI, CSBG, etc.) 	PD or online	All
Security Manager information - create anytime after Program export from Web Tool					
Create User Groups	Security Manager	LA	<ul style="list-style-type: none"> Which groups of Programs will be needed by Users Any Groups that may need access to specific Reports 	PD	All
Create Group Permissions	Security Manager	LA	<ul style="list-style-type: none"> Which Group(s) need access to which Program(s) 	PD	All
Create Users	Security Manager	LA	<ul style="list-style-type: none"> User names User email addresses 	PD or HR staff	All
Create User Permissions	Security Manager	LA	<ul style="list-style-type: none"> Which User Groups each user should be linked to or which programs does each User need access to 	PD	All
Create Report Permissions, Adhoc View permissions	Security Manager	LA	<ul style="list-style-type: none"> Which Reports does the Org need Which Reports does each Group need 	ED or PD	All
Create Tab Groups for Resource Mgr NR	Security Manager	LA	<ul style="list-style-type: none"> Whether Org is using Resource Mgr 		WX
Create Locations and Contacts	Org section	LA	<ul style="list-style-type: none"> Location name, type, address Contact name, phone, fax, email 	ED or PD HR	All
Create Contracts	Org section	LA	List of all Contracts, for each one: <ul style="list-style-type: none"> Contract Type, Funding Source, Funding Area Current year name of Contract Contract Code Length, Dates and \$ Amounts Contact Type (For Contracts) Performance Measures to link 	FO	All
Set up Funding Codes	Org section	LA	<ul style="list-style-type: none"> All combinations of Contracts that pay for Activities 	PD or FO	All

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Add Program details	Org section	LA	<ul style="list-style-type: none"> Question Code & Standard Name Category to assign Auto create method to use Focus Code to use Project Name and Description Closeout Mode 	PD	All
Link Locations to Program	Org section	LA	<ul style="list-style-type: none"> Which Locations are used by each Program 	PD	All
Set FIPS Parameters	Org section	LA	<ul style="list-style-type: none"> HUD information for each Program 	PD	HMIS
Set up Program Components	Org section	LA	<ul style="list-style-type: none"> New Program Components if needed Auto create mode 	PD	All
Finish Activity setup	Org section	LA	<ul style="list-style-type: none"> Funding Code – which Contracts pay for each Activity Any additional Activities that need to be added, for each one – Activity Type, Standard Name, Funding code, Question Code only if it is Profile activity type Unit type and amounts, costs Auto create and swipe mode Set up for Referrals, Sessions 	PD, FO	All
Check Milestones	Org section	LA	<ul style="list-style-type: none"> New Milestones if needed Which Milestones will link to which Target Areas 	PD, OD	All
Create Forecast NR	Org section	LA	<ul style="list-style-type: none"> How long it will take “average” client to complete each Milestone How many clients are expected to enter Program and complete each Milestone How many clients will be in the Program at the start of the Forecast period and at what Milestone level they will be 	PD	Not required
Create Questions for any Profile Activities NR if no profile activities	Org	SA or LA	<ul style="list-style-type: none"> Questions All potential answers; can there be multiple answers? Do specific answers allow skipping any questions 	PD	All
Create Report sections	System section	SA	<ul style="list-style-type: none"> Report structure Question Codes for each section 	PD or ED	All
Create Report Questions	Org	SA or LA	<ul style="list-style-type: none"> Questions Codes for each section Questions and answers for each section 	PD or ED	All
Add information for Address dropdowns NR	System section	SA	<ul style="list-style-type: none"> Cities, Counties, States for collaborative 	PD	All
Create Start Page NR	System section	SA	<ul style="list-style-type: none"> Logos Titles and other information for collaborative 	ED	All
Bed Inventory	HMIS	LA or PD	<ul style="list-style-type: none"> Locations where beds will exist Room Names, Bed Names Individual or Family Population types Program type Dates if seasonal 	PD	HMIS
NR = Task not required					