IFCAP[1] Setup Checklist

ACTIVITY	STATUS	RESPONSIBLE	TIMELINE	COMMENTS
Ensure that the latest version of IFCAP is currently installed and patched up to date.				
1. Establish a Station Creation Date. Suggest at the beginning of a Fiscal Year, but certainly beginning of a Quarter to aid in reconciliation of budgetary data.				
2. Designate an IFCAP Application Coordinator for your site				
3. Determine Standard IFCAP Menus and Keys based on the recommendations found in table 4-1 in the IFCAP APPLICATION COORDINATORS MENU				
A. Assign IFCAP Menus and Keys				
B. User's Toolbox from the IFCAP Menu Edit Users Electronic Signature Code (Section 3.3)				
4. Create Domains (specifically Q-FMS) and Mail Groups				
5. Load IFCAP SITE PARAMETERS using the option of the same name.				
A. Determine the existence of a Sub Station use the Sub Station Enter/Edit option to create if applicable				
B. Create FMS as a Mail Invoice Location in the IFCAP SITE PARAMETERS. Create SIMPLIFIED as a Receiving Location in the IFCAP SITE PARAMETERS.				
C. Determine Printer Settings of Dedicated IFCAP				

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[1] IFCAP - Integrated Funds Control, Accounting, and Procurement

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Printers. Details in section 4.12.6 of IFCAP APP COORDINATORS manual.				
6. Use the option ADD/EDIT Supply Personnel to add the list of A&MM Personnel				
7. Contact FMS via the Austin Help Desk and VACO to establish costing information and links to the new station number.				
8. The following files must be defined and populated with appropriate values. May consider complete kids builds from a closely related database for some.				
CPA Form Type 410.5 Cost Center 420.1 PRCD SD STATUS 420.1999 BOC 420.2 Unit of Issue 420.5 Reason Not Competed 420.51 Solicitation Procedure 420.52 EPA Designated Product 420.55 Source Code 420.8 PRC IFCAP Message Router 423.5 Vendor 440 Item Master 441 Federal Supply Classification 441.2 Purchase Authority 442.4 PAT Type 442.5 Administrative Certifications 442.7 Local Procurement Reason Codes 443.8 Generic Code Sheet Transaction Type/Segment 2101.2				
9. Build Vendor File.				
A. Consider a full VENDOR file copy from another closely related database, using the KIDS functionality. Considering proximity to rollover date and amount of vendor activity after kids build				

ACTIVITY	STATUS	RESPONSIBLE	TIMELINE	COMMENTS
complete, users might request an update to the VENDOR file in the last few days prior to rollover to account for vendors added to primary system after original build complete.				
1) Use the FEDERAL VENDOR EDIT options to Identify/Edit GSA, DLA, and VA Supply Warehouse Vendors. Only one Supply Warehouse Vendor can be identified.				
2) Use the EDI Vendor Edit under the IFCAP APPLICATION COORDINATORS menu to establish any EDI Vendors. Section 4.15 of the IFCAP APP COORDINATOR manual for detail.				
B. Contact EDI Help Desk in Austin to coordinate new EDI Vendors being used if applicable				
10. Build Item File				
Consider a full ITEM file copy from another closely related database, using KIDS functionality. Considering proximity to rollover date and amount of item activity after kids build complete, users might request an update to the ITEM file in the last few days prior to rollover to account for vendors added to primary system after original build complete.				
11. Determine the use of GIP. Use Inventory Point Management located under the Accountable Officer Menu to establish and edit Inventory Points or Consider steps 1 and 2 below.				
A. Consider a partial GIP INVENTORY copy from another closely related database, using the .01 field to identify IPs. If file 445 is populated in such				

ACTIVITY	STATUS	RESPONSIBLE	TIMELINE	COMMENTS
a way, the Authorized User will need to be established for each IP. Considering proximity to rollover date and amount of IP activity after kids build complete, users might request an update to the IP file in the last few days prior to rollover to account for vendors added to primary system after original build complete				
1) If kids build copy is used for file 445, the same partial copy of the 445.2 Storage Location will be necessary.				
12. Consider Barcoding items to aid in GIP Inventory Processing.				
13. Establish Clinical Logistics Report Server (CLRS) functionality.				
14. Establish the Extract Directory.				
A. Edit CLO SYSTEM PARAMETERS (CLRS) via the CLINICAL LOGISTICS OFFICE menu under the IFCAP APPLICATION COORDINATORS menu. Add the CLRS Extract Directory information. Verify values in other fields. Section 4.20.2				
B. Verify existence of the PCPLO CLRS NOTIFCATIONS Mailgroup and populate with members. Section 4.20.3				
C. Schedule the following monthly background jobs in TaskMan (PRC*5.1*95):				
1) PRCP OPEN BALANCES TASKMAN SET – This job should only be run on the 1st of the month. It will adversely affect balances if run at any other time				Schedule for 1st day of Month, just after midnight (i.e., 1/01/08@0005; frequency = 1M

ACTIVITY	STATUS	RESPONSIBLE	TIMELINE	COMMENTS
				In File 19, set the SCHEDULING RECOMMENDED field to YES.
2) PRCPLO CLO GIP OPTION -- Manually run this job upon initial set-up of the directory via the CLINICAL LOGISTICS OFFICE MENU option. If successfully tested, schedule to run on a monthly basis via TaskMan.				Schedule for 1st day of Month, 2 to 3 hrs after OPEN BALANCES job begins (i.e., 1/01/08@0200; frequency = 1M In File 19, set the SCHEDULING RECOMMENDED field to YES.
3) PRCHLO CLO PROCUREMENT -- Manually run this job upon completion of the manual run of the GIP option. Run this via the CLINICAL LOGISTICS OFFICE MENU option If successfully tested, schedule to run on a monthly basis via TaskMan				Schedule for 1st day of Month, 1 hr after GIP job (i.e., 1/01/08@0300; frequency = 1M In File 19, set the SCHEDULING RECOMMENDED field to YES.
15. Establish FPDS functionality.				
16. Add PRCEC PRINT PO FROM 1358 to following menu options				
PRCEC 1358 FCP PROCESSING PRCHOUT FPDS RPT PRCFA ACCTG TECH				
17. Verify that the station has the required Vitria Interface Engine (VIE) set-up.				Work with VIE Team and IRM to establish, if necessary.

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18. Contact VIE Team for TCP/IP Address assigned for FPDS.				
19. Edit the IFCAP_FPDS HL7 Logical Link via the LINK EDIT option under INTERFACE DEVELOPER OPTIONS. Add the TCP/IP Address provided by VIE Team and define the TCP/IP Port as 8090 under the LLP TYPE sub-menu. (Ref PRC*5.1*79, post-install, step #2). Set AUTOSTART to ENABLED.				
20. Verify that HL7 has established a multi-listener port (Ref PRC*5.1*79, post-install, step #3).				
A. Verify that at least one INCOMING Filer and one OUTGOING Filer are running.				
21. Start the IFCAP_FPDS logical link. Check the SYSTEMS LINK MONITOR to verify that it starts and messages (if any exist) begin transmitting.				
A. Verify that OGR AUSTIN MESSAGES mailgroup has valid members assigned.				
22. Use the option ESTABLISH Common Number Series to establish the method of automatic numbering of purchase orders. Section 4.13 IFCAP APP COOR manual for more detail.				
23. Load Control Points using ADD/EDIT Control Point Option under the Budget Utilities Menu				
A. Add Users and Level of Access for each FCP				
1) Determine specialty of each FCP where appropriate				
2) Determine funding information for each FCP				
3) Assign LOG Dept Numbers via the PPM Utilities menu for each FCP				

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B. Distribute Ceiling Amounts to each FCP using the FUNDS DISTRIBUTION menu				
24. Schedule GECS STACK TRANSMIT TASKMAN job via TaskMan.				
25. Purchase Card Set Up				
A. Contact CITIBANK to establish Purchase Cards				
B. Establish Cards in IFCAP using the PURCHASE CARD COORDINATOR menu REGISTER PURCHASE CARD				
C. Provide training on Purchase and Reconciliation to all Purchase Card Holders.				
D. Receive and Hand out new cards to users				
26. Set up LOGISTICS DATA QUERY TOOL (LDQT) for selected individuals.				
A. Install the PRCLogisticsTools_v1.exe on the individual workstation for those individuals select to access this option.				
B. Add the VistA menu option PRCHL GUI as a secondary menu option to the VistA user profile for each potential user of this Logistics Data Query Tool.				