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VIVÉ Admin Tools Reference Guide

VIVÉ is a customized client management system designed by NYC Aging. This system supports NYC Aging contractors in managing their client interactions and reporting on services provided. This reference guide provides instructions on creating, enrolling, disenrolling and the features of Admin Tools.

Admin Tools is a common, core functionality within VIVÉ, which is described within this guide. There is some functionality specific to Home Delivered Meal programs, such as administrating their drivers, is not described here; only within their Program Guide.

You may have accessed this guide from the VIVÉ Knowledge Base or from a program specific reference guide. At the beginning and end of this document is a link to return to the VIVÉ Knowledge Base. You can also use your browser's back button to return to the program reference guide.

This guide provides navigational and functional instructions. For assistance with program operations or policy, please refer to your program officer or view NYC Aging's Programs' Standards.

In this guide you will learn:

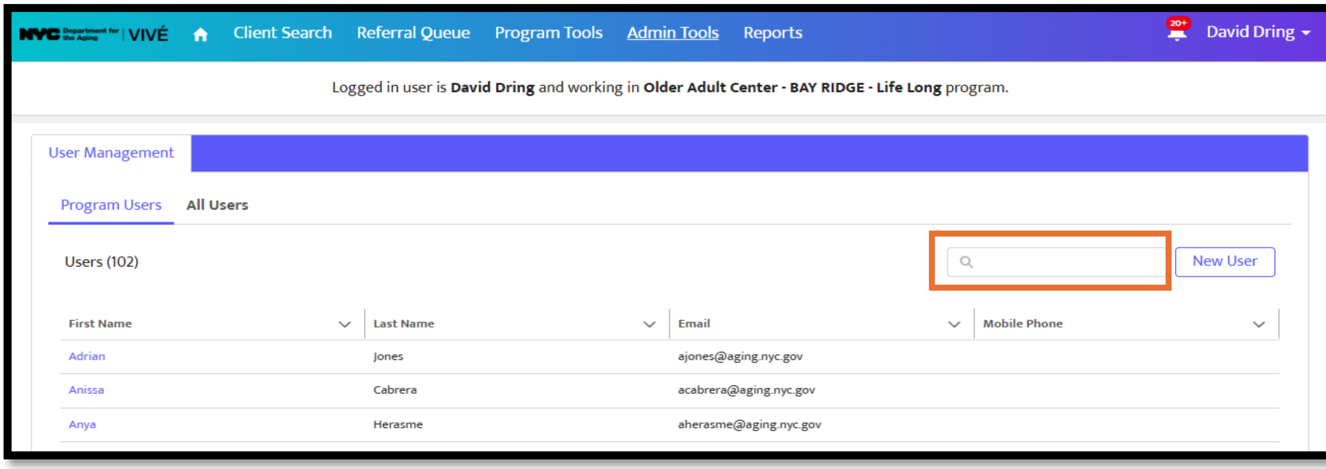
- **Accessing Admin Tools**
- **Viewing Users**
    - Searching for Users
- **Creating a New User**
- **Editing a User**
    - Editing Basic Information
    - Editing User Roles with Program Associations
- **Inactivating a User from a Program Association**

If you have any questions, please contact the **VIVÉ Application Support Center** by submitting a ticket through the **Ticketing Module** under **Program Tools.**

Accessing Admin Tools

The core function of Administrative Tools is managing users. This is where users are viewed, created, and edited.

From **Top Menu**, click **Admin Tools**. The **User Management** tab will be displayed by default. This page lists all the users within your program.

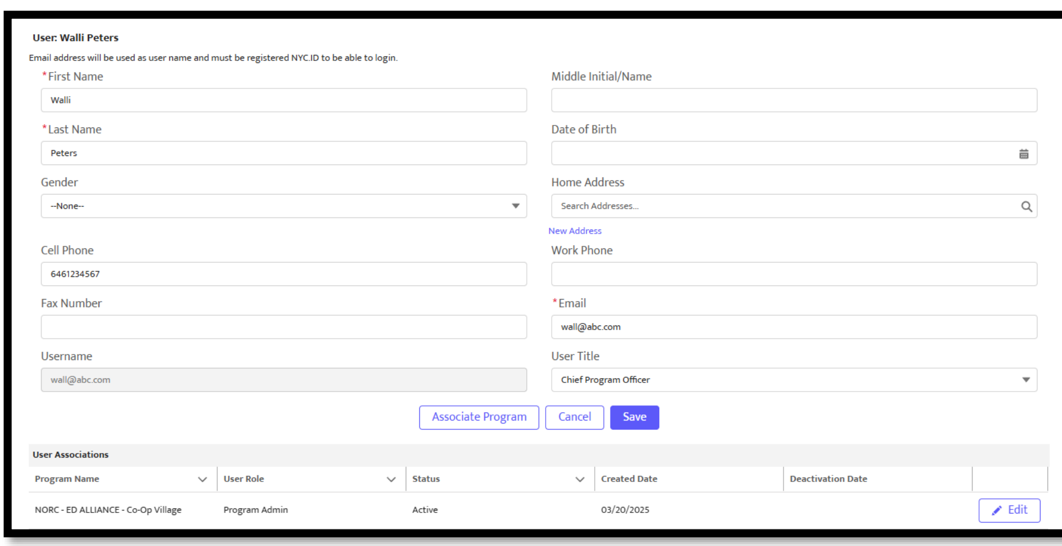


Viewing Users

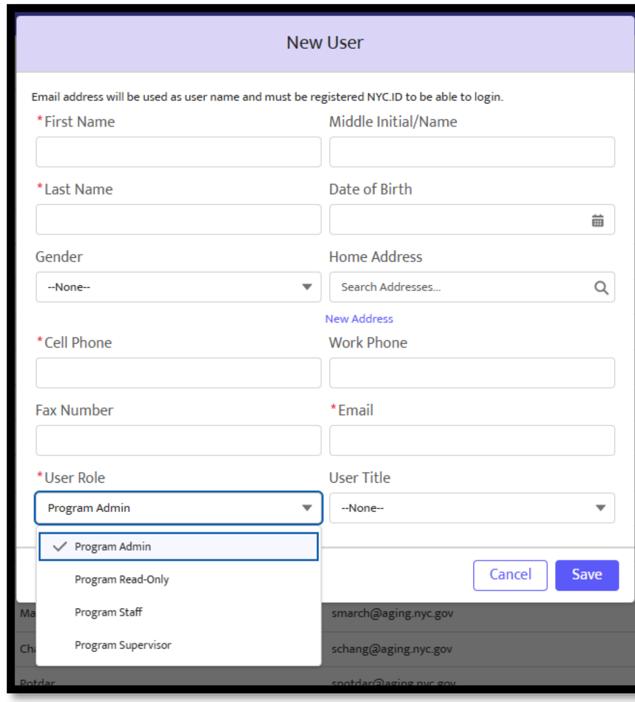
There are two types of users within VIVÉ. The first are Program Users, those users who are associated with your program. The second are all other users. These include every user within VIVÉ. You have access to them should you ever need to associate them with your program.

Searching for Users

There is a search box on **User Management** page. Enter either in part of or a complete user name to retrieve a list matching your search criteria. Clicking on a user's name link displays the user's details, including what programs they are associated with.



Creating a New User



Step 1: From the **Top Menu**, click on **Admin Tools**.

Step 2: From the **User Management** list view, select the **New** button.

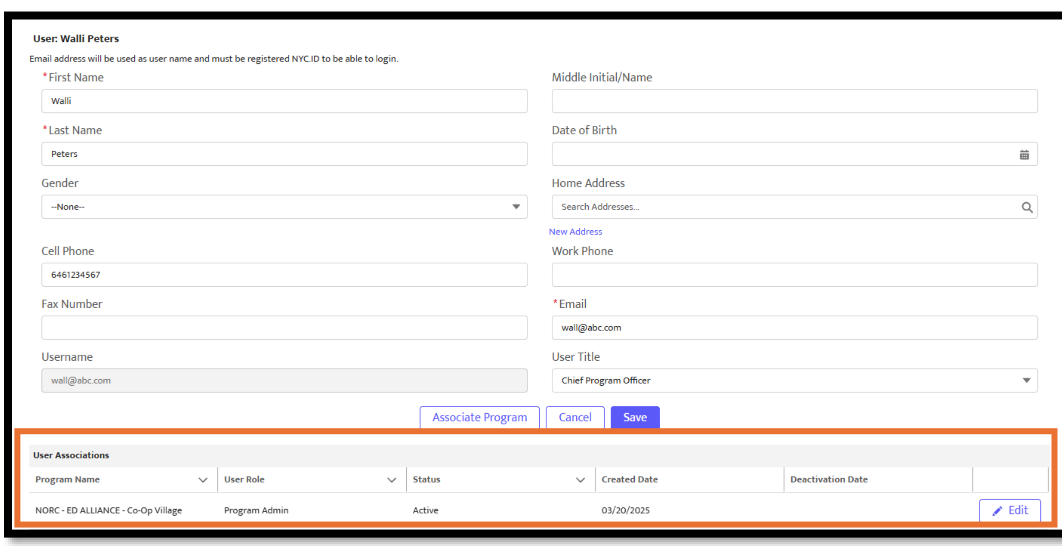
Step 3: From the **New User** pop-up, enter the required fields, such as Name, Phone #, Email and User Role.

***NOTE**: The Email Address must be the same one associated with their NYC.ID.*

There are four User Roles:

- **Program Admin**: has the ability to manage users of associated programs.
- **Program Read-Only**: can view but not make any edits to select programs.
- **Program Staff**: the primary users of the system
- **Program Supervisor**: the people responsible for approving and finalizing staff activities. For example, Program Supervisors approve, reject or close a client's enrollment into a program.

Step 3: Once the user's information is saved, the user details page appears to associate the user with their program(s). There is no limit to the number of programs a user can be associated with.



Editing a User

There are two primary edits to a user's details: basic information and user roles with program associations.

Editing Basic Information

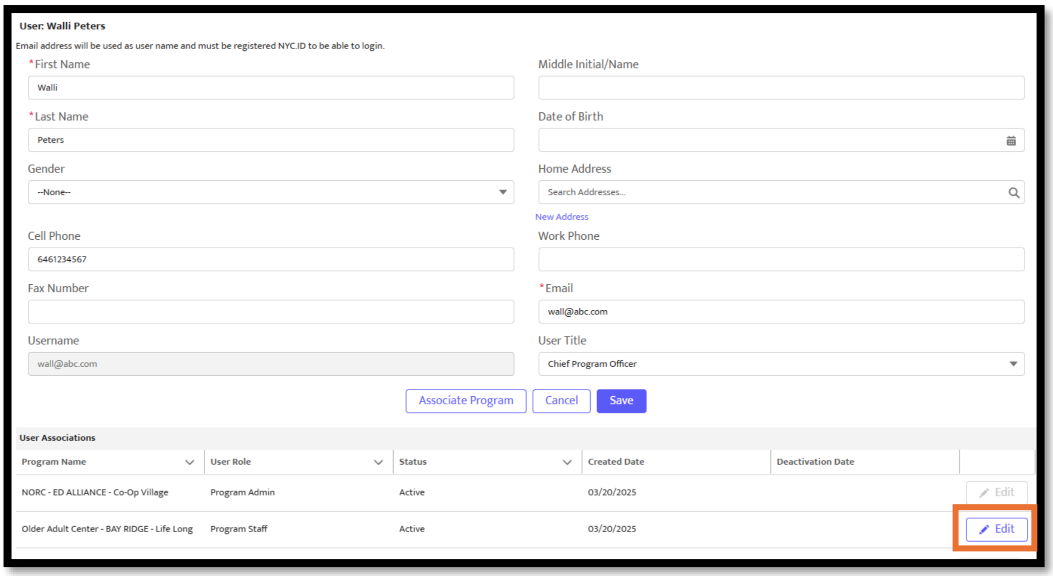
Step 1: From the Top Menu, click on Admin Tools.

Step 2: From the User Management list view, click the user's name link.

Step 3: From the user details page, edit information within any field. Select Save when finished.

Editing User Roles with Program Associations

A user can have different roles with their different program associations. For example, Walli is associated with a NORC as a Program Admin and with the OAC as Program Staff.

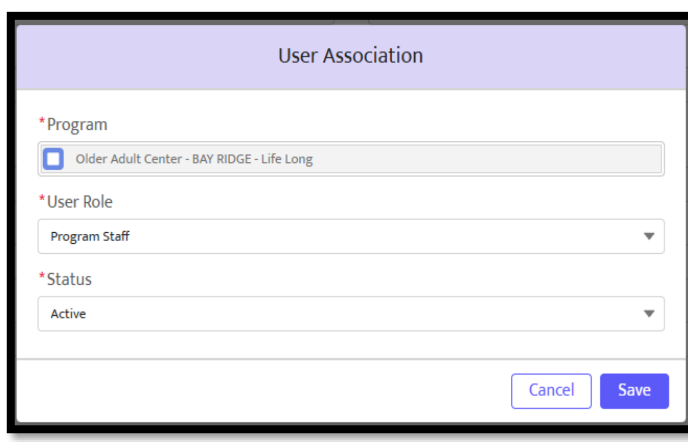


Step 1: From the Top Menu, click on Admin Tools.

Step 2: From the User Management list view, click the user's name link.

Step 3: From the user details page, select the Edit button to manage program association details.

Step 4: Within the User Association pop-up, change either User Role or Status. In this way, you establish the user's role for that particular program.



***NOTE**: You may see a person is associated with other programs, but you can only edit those associations where you are a Program Admin.*

Inactivating a User from a Program Association

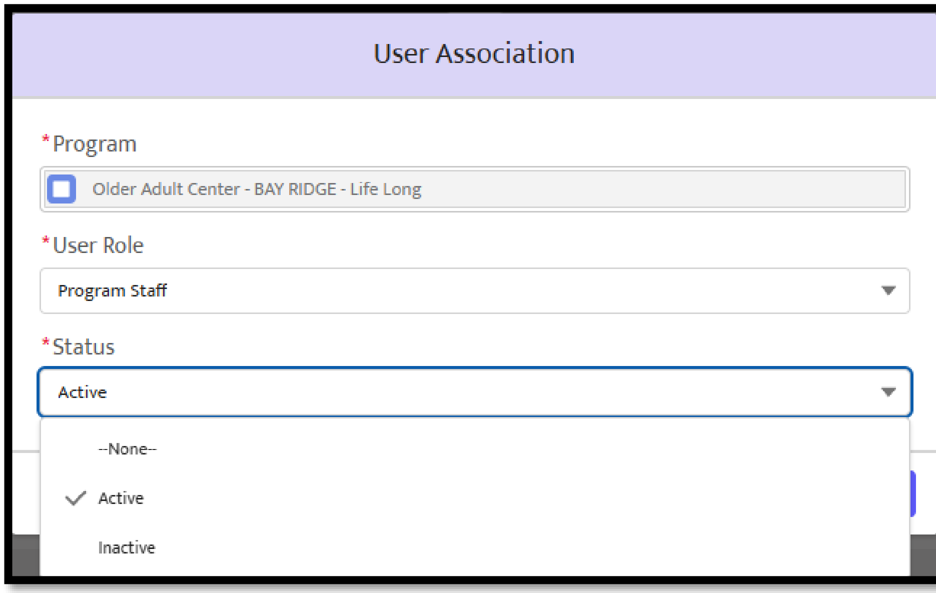
While users are never deleted from the system, they are inactivated from a program. In this way, they can be reactivated with another program later.

Step 1: From the **Top Menu**, click on **Admin Tools**.

Step 2: From the **User Management** list view, click the user's name link.

Step 3: From the user details page, **select the Edit** button to manage program association details.

Step 4: Select the Status drop-down to change the user's status. Then **Save**.



Access Assistance with VIVÉ and the VIVÉ Knowledge Base

- VIVÉ Knowledge Base contains reference guides, short videos and recorded trainings
- If you have any questions, please contact the **VIVÉ Application Support Center** by submitting a ticket through the **Ticketing Module** under **Program Tools.**

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