
Resource Management



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CWS/CMS Training Module Conventions

Module Purpose and Organization

This student guide is business process oriented. So certain sections, notebooks, and pages may be skipped in a specific module and presented later when they are relevant to a process.

This module introduces you to the Resource Management and Authorities and Privileges structure.

This module contains the following:

- Skill building exercises to be used in conjunction with Scenario Manager
- A list of objectives for the module
- An overview of the Resource Management application
- Concept and structure for Authorities and Privileges
- Program Management (PM) reports
- A summary of the module

Skill Building Exercise: Creating Staff Person and Assignment Notebooks

Scenario Manager File: [M05_S02] - Resource Management (Part 1).arc

User ID = WALLACG

Password = \$Good2go

Background Information

The County Office Administrator is out on leave. You have been temporarily assigned as the backup County Office Administrator. You must input information for two new employees in the Resource Management application. Open the Existing Office notebook for the Downtown Sacramento Office before proceeding.

1. Create a staff person notebook for each of the following new employees:

Prefix	Mr.
First	Joe
Middle	A.
Last	S
Primary Phone	(916) 000-4735
Extension	344
Start Date	02/26/2004
Job Title	Social Worker
Language	English Spanish
Functional Specialty	Emergency Response Dependency Investigation Permanent Placement
Domain/Description	CWS6603A
Password	Budd1BUD
Category	Access Authority
Privilege	CWS Case Management System
Level of Authority	User

Prefix	Ms.
First	Karen
Middle	E.
Last	G
Primary Phone	(916) 000-4735
Extension	314
Start Date	02/26/2004
Job Title	Supervisor
Language	English Cambodian
Functional Specialty	Emergency Response Dependency Investigation
Domain/Description	CWS6603A
Password	Buff1BUD
Category	Access Authority
Privilege	CWS Case Management System Resource Management System Administration
Level of Authority	Office Administration

Skill Building Exercise (continued)

2. You must also create a new Assignment Unit and give Karen G Unit Supervisor authority. In addition, you are creating a caseload and assigning it to Joe S.

Unit Name	Family Reunification
Phone Number	(916)000-4735
Ext	201
Start Date	09/21/2004
Functional Specialty	Family Reunification/Court
Staff Name	Karen G
Authority	Unit Supervisor
Number/Name	In-box Caseload
Assignment In Box	Yes
Start Date	09/21/2004
Caseload	FR 1
Start Date	09/27/2004

Resource Management

Introduction

This module introduces you to the CWS/CMS Resource Management application. Authorized personnel use Resource Management to maintain CWS/CMS resources in support of Child Welfare Services casework. For resources (such as CWS offices, law enforcement agencies, document templates, and placement facilities) to be available in Resource Management, they must first be recorded in Resource Management.

Objectives

After completing this module, you will be acquainted with the following:

- Starting the Resource Management application
- The County Organization Section
- The Related Organizations Section
- The Operations Section
- The Placement Facility Section

Starting the Resource Management Application

To start the CWS/CMS Control Panel and the Resource Management application, follow these steps:

1. From the Windows desktop, double-click the CWS/CMS icon.



Figure – RM_001

2. In the CWS/CMS Control Panel login window, (A) verify your User ID, (B) type your password, and (C) click the OK button.

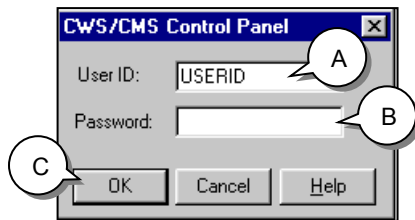


Figure – RM_002

3. From the CWS/CMS Control Panel, click the (A) Resource Management application icon.

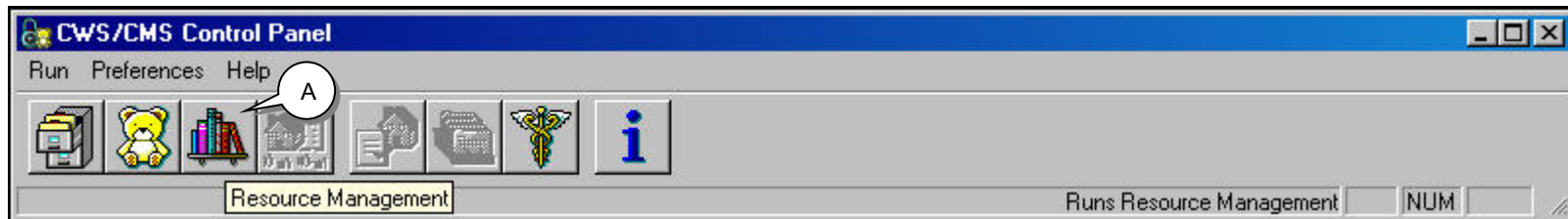


Figure – RM_003

County Organization Section

The County Organization Section (green button) is used to create an office, assignment units, and staff persons, and to assign caseloads.

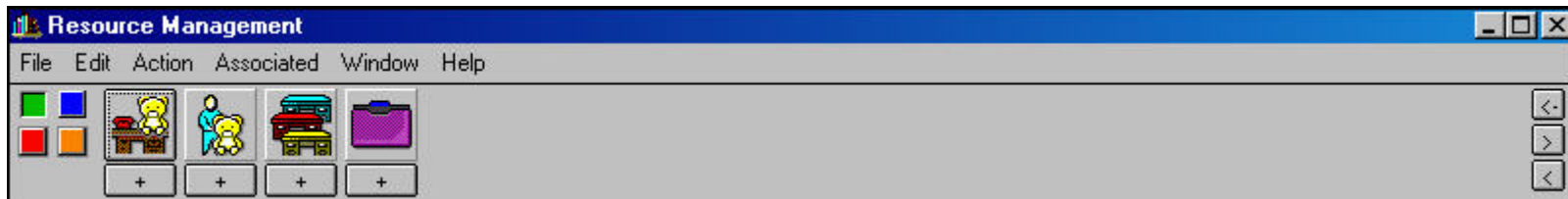


Figure – RM_004

- CWS Office Notebook

This notebook is used to view, add, or change information about the contact person, address, and network details.

- Staff Person Notebook

This notebook is used to view, add, or change Child Welfare Services staff person information.

- Assignment Unit Notebook

This notebook is used to view and enter information about assignment units for CWS staff.

- Special Project Notebook

This notebook is used to view and enter information about alternate program rules and services used to manage cases, referrals, and placement homes.

Related Organizations Section

The Related Organizations Section (blue button) is used to record all government entities (both CWS and non-CWS agencies) that have a business interest in CWS activities.



Figure – RM 005

- Government Agency Notebook

The Government Agency notebook is used to record all government entities (other than CWS agencies), that have a business interest in CWS activities. Such agencies include courts (other than juvenile), Department of Health, Department of Justice, Community Care Licensing, and the Bureau of Indian Affairs.

- Law Enforcement Agency Notebook

The Law Enforcement Agency notebook is used to record information about the location and contact information for Law Enforcement agencies with which CWS Office staff interacts. Includes law enforcement personnel who witness child abuse, receive reports of child neglect, take custody of children in danger, etc.

- Tribe Notebook

Recorded by a state-level administrator, the Tribe notebook is used to review organizations representing individual Indian Tribal Affiliations or groups of tribal affiliations recognized by the Federal government. CWS contact with a tribe can confirm a child's membership or eligibility to become a tribe member. Tribal membership can entitle a child to specific services.

- Education Provider Notebook

The Education Provider notebook is used to record the name, contact, and address for each school a child client was or is attending. State Administrators have the privilege to make changes in the Education Provider notebook for education providers throughout the state. County Administrators have the privilege to make changes only for those education providers in their own county.

Related Organizations Section (continued)

- **ICPC Administrator Notebook**

The ICPC Administrator notebook is used to review information about the state-designated ICPC (Interstate Compact for the Placement of Children) Administrator in states other than California.

- **Attorney Notebook**

The Attorney notebook is used to record or view information on attorneys who represent clients, substitute care providers, and CWS staff in court.

- **Court Notebook**

Use the Court notebook to record or view information on juvenile courts in California. State Administrators have the privilege to make changes in the Court notebooks for courts throughout the state. County Administrators have the privilege to make changes only for those courts within their own county. See the Assignment Unit notebook section for information on how levels of authority are assigned.

- **Adoption Agency Notebook**

The Adoption Agency notebook is used to enter and view information about an out-of-state public agency or an in-state private agency that conducts and approves home studies on adoptive parents, prepares cases for the termination of parental rights of dependent minors, accepts voluntary relinquishments, and places children for adoption.

Operations Section

The Operations Section (orange button) contains the Code Table notebook and the Template Management notebook.

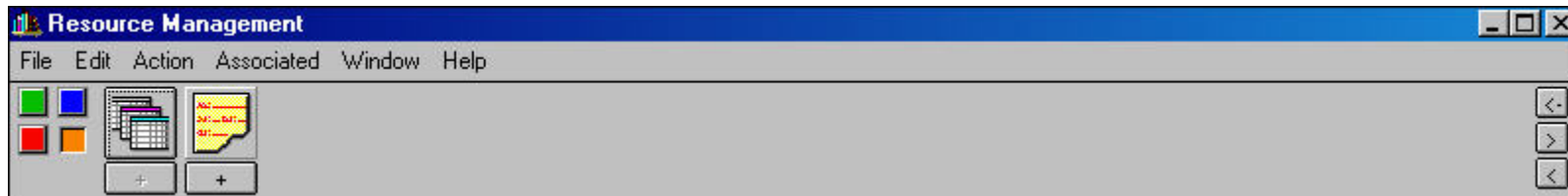


Figure – RM_006

- Code Table Notebook

The Code Table notebook allows you to view the values in any selected code table in the CWS/CMS database. Code tables contain lists of values. Values populate a variety of fields and dialog boxes in the CWS/CMS application. It is helpful for certain individuals (e.g., policy writers and trainers) to know what values are available to be selected in the menus in the CWS/CMS application.

- Code Table notebooks are read-only—you can not add, modify, or delete any of the code table values contained in this notebook. A user cannot create a new Code Table notebook nor delete an existing one.

- Template Management Notebook

The Template Management notebook enables a user to view and enter information about county-specific templates. The templates that are attached to the CWS/CMS application using the Template Management notebook are used by counties to meet specific county needs. There are no instructions provided in the module for creating templates as this functionality is not available in Scenario Manager.

Placement Facilities Section

Scenario Manager File: [M05_S03] - Resource Management (Part 2).arc

User ID = WALLACG

Password = \$Good2go

The Placement Facilities Section (red button) is used to create and update information about placement homes, substitute care providers, county Foster Family Home licensing cases, group home organizations, and home studies done on persons who have applied to adopt children, and update some information about foster family agencies (Foster Family Agency notebook).

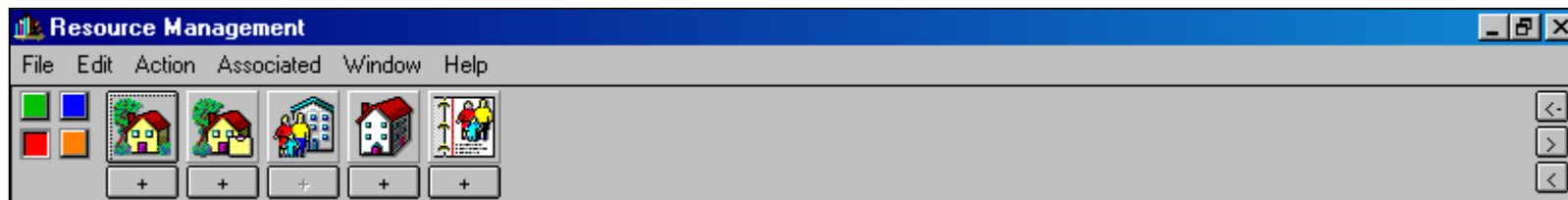


Figure – RM_007

- Placement Home Notebook

The Placement Home notebook is used to record information about homes (and their associated substitute care provider) that are available for child placement. Types of potential placement facilities recorded here include licensed foster family homes, a relative's home, and small family homes.

- County License Case Notebook

The County License Case notebook is used to record information on the status, characteristics, visits to, and issues involving county licensed homes.

Placement Facilities Section (continued)

- Foster Family Agency Notebook

The Foster Family Agency notebook is used to view information about Foster Family Agencies (FFA) and Transitional Housing Placement Programs (THPP). The FFA is licensed to certify Foster Family Agency Certified Homes. The THPP is the administrative body for one or more Transitional Housing Placement Program Facilities (THPPF). Information about Foster Family Agencies and Transitional Housing Placement Programs is automatically displayed in the notebook from the LIS interface with Resource Management.

- Group Home Organization Notebook

The Group Home Organization notebook is used to record information about organizations that represent group homes and community treatment facilities. Group Home Organizations and Community Treatment Facility Organizations are administrative bodies that represent one or more group homes or community treatment facilities.

- Home Study Notebook

The Home Study notebook is used to view and record the results of an investigation and assessment of one or two applicants' suitability to become adoptive parents.

Authorities and Privileges

Scenario Manager File: [M05_S02] - Resource Management (Part 1).arc

User ID = WALLACG

Password = \$Good2go

Introduction

This module will introduce you to the CWS/CMS levels of authority, privileges, and privilege authority, each of which works together to maintain security of CWS/CMS information. A user's access to information in CWS/CMS is contingent upon the level of authority and the privileges assigned to the user's logon ID and password. A system administrator assigns authorities and privileges to staff persons, allowing them access to specific CWS/CMS tools and specific uses of those tools according to their job responsibilities.

Objectives

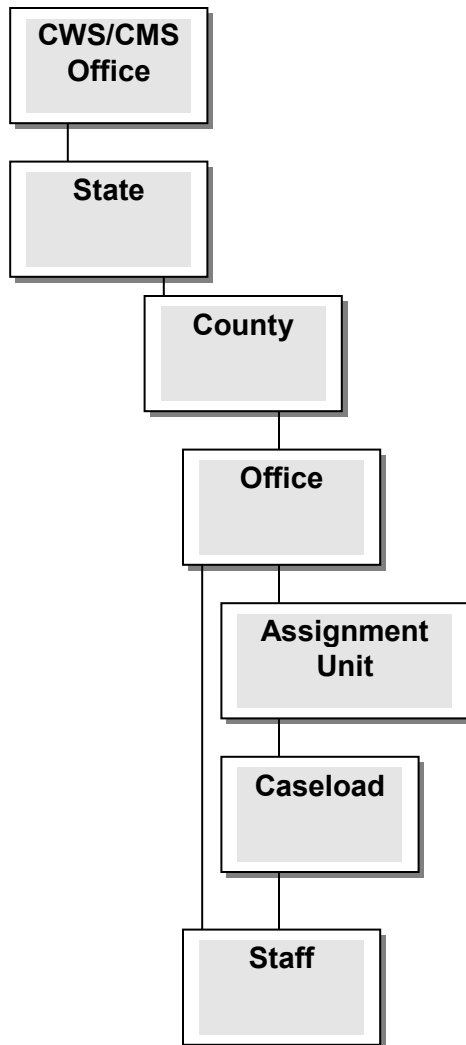
After completing this module, you will be acquainted with the following:

- The structure upon which authorities and privileges are built
- Privileges
- Levels of Authority
- Staff Authority

Authorities and Privileges (continued)

Structure

The following chart illustrates the structure upon which control is built for all available areas of authority and privilege in the CWS/CMS application.



The **CWS/CMS Office** represents the teams involved in the implementation and maintenance of the CWS/CMS application. Select individuals from the CWS/CMS Office will have access to all areas of the system.

The **State** represents CDSS who have access to CWS/CMS.

The **County** represents the 58 county Child Welfare and Probation organizations that have access to the system in order to use CWS/CMS.

The **Office** represents a group within a county that has staff performing CWS/CMS tasks. Each county must have at least one Office. There is no limit to the number of Offices a county can have.

The **Assignment Unit** represents a subset of the county Office that contains units of work and is the CWS/CMS name for any “Unit” in a County. Each Office must have one Assignment Unit called the “Assignment Desk”. The “Assignment Desk” is the receiving point for new cases and referrals in the Office.

The **Caseload** represents a grouping of cases and/or referrals. A caseload is associated with an Assignment Unit. Each Assignment Unit will have at least one Caseload called “In-box caseload.” The “In-box caseload” is the receiving point for new cases in the Assignment Unit.

Staff represents the individuals using CWS/CMS to access cases and referrals to perform work. Staff Persons belong to an Office and are assigned to Caseloads associated with their Assignment Unit.

Authorities and Privileges (continued)

Authorities and Privilege Table

Privileges are used in combination with a Level of Authority to provide access to different kinds of information within CWS/CMS. The following table describes each Privilege:

Privilege	Description
Access Authority	
Adoptions	Allows the user to add, modify, and delete Adoptive Placement notebooks in Client Services.
Bulletin Administrator	Allows Add, Modify, and Delete of Bulletins (A State Privilege).
Closed Case/Referral Update	Allows specific information in closed cases and referrals to be updated.
Code Table Maintenance	Allows code tables to be updated.
County License Case Management	Allows a user to add and modify County License Case notebooks.
CWS Case Management System	Allows access to the Client Services applications. (All workers needing access to Case Data should have this privilege.)
Non-CWD	Allows a worker to select Non-CWD Foster Care as an intervention reason in the Client Services application Case info notebook. Used to manage Non-County Welfare Department cases.
Program Management (PM) Reports	Allows the Client Services Program Management (PM) Reports to be run. (You must have this privilege to create PM Reports.)
Resource Management	Allows access to the Resource Management application.
Resource Management Placement Facility Maintenance	Allows Non-LIS information about LIS placement facilities for the user's county to be updated. Also, allows SCPs for the home to be added, modified, and deleted.

Authorities and Privileges (continued)

Privilege	Description
System Administration	Allows access to templates and the ability to add domain information for a CWS Office. (Needed to modify the network page of the CWS Office notebook.)
Interface Authority	
LIS	Allows access to the LIS System.

Authorities and Privileges (continued)

Privilege	Description
Limited Access Authority	
Sealed	Allows access to Sealed Cases/Referrals.
Sensitive Persons	Allows access to Sensitive Cases/Referrals.
Override Authority	
Countywide Read	Allows the user to READ any Case/Referral in the county.
Countywide Read/Write	Allows the user to READ/UPDATE any Case/Referral in the county.
Officewide Read	Allows the user to have read-only access to any Case/Referral in your office, excluding those marked with Limited Access Authority Sealed or Sensitive privilege.
Officewide Read/Write	Allows the user to read any Case/Referral in your office, excluding those which are marked as Sealed or Sensitive. The user can update any Case/Referral that can be read, with the exception of those which are closed.
Statewide Read	Allows the user to READ any Case/Referral in the state.

Authorities and Privileges (continued)

Level of Authority

Level of Authority is the first level of access to information that is contained in CWS/CMS. Levels of Authority provide for layers of control within a county's CWS/CMS organization and are limited to functions within the Resource Management application of CWS/CMS. These levels do not by themselves grant any capabilities over referrals, cases, or caseloads. The following table lists the hierarchy of Levels of Authority present in CWS/CMS:

Level of Authority	Capability						
	Create/Delete Offices	Create Assignment Units	Create Caseloads	Create Staff	Create Logon ID's	Assign Levels of Authority/Privileges	Create ICPC Administrator
Global Administrator	S	S	S	S	S	S	N/A
State Administrator	S	S	S	S	S	S	S
County Administrator	C	C	C	C	C	C	N/A
Office Administrator	N/A	O	O	O	O	O	N/A
User	N/A	N/A	N/A	N/A	N/A	N/A	N/A

S=Statewide C=Countywide O=Officewide

Authorities and Privileges (continued)

- A County or Office Administrator must have the Resource Management Access Privilege in order to exercise any capabilities provided by their assigned Level of Authority.
- The CWS/CMS Office has the Global Administrator Level of Authority. The State has the State Administrator Level of Authority.
- Individuals having one Level of Authority may only assign lesser Levels of Authority than their own.
- At a minimum, each county has one County Administrator. An Office Administrator is optional.
- Program Management Report Privileges are required to print most Program Management (PM) Reports.

Authorities and Privileges (continued)

Staff Authority

The next level of access to CWS/CMS information is called Staff Authority. Staff Authority defines a staff person's ability to perform supervisory actions upon caseloads in their assignment units. The following table illustrates actions associated with a particular Staff Authority:

Supervisor	Assignment/Transfer	Approval	Both	None
<ul style="list-style-type: none">• All functions of Approval• All functions of Assignment/Transfer• Create Caseloads• Grant Staff Authorities• Update Assignment• Unit information	<ul style="list-style-type: none">• Establish Case/Referral primary assignment• Make secondary or read-only assignments• Transfer primary assignment across caseloads	<ul style="list-style-type: none">• Modify request status for Supervisor Approval including:• Placement• Incidental Payment• Referral Response• Case Plan• Case Closure• Ongoing Payment• Shelter Care Extension• Court Report• Case Transfer• Referral Client Disposition Requests	<ul style="list-style-type: none">• All functions of Assignment/Transfer• All functions of Approval	<ul style="list-style-type: none">• No supervisory ability assigned

Refer to the Skill Building Exercise in this document: Creating Staff Person and Assignment notebooks.

Starting the Resource Management Application - Create a Staff Person

To start the CWS/CMS Control Panel and the Resource Management application, follow these steps:

1. From the Windows desktop, double-click the CWS/CMS icon.



Figure – RM_008

2. In the CWS/CMS Control Panel logon window, (A) verify your User ID, (B) type your password, and (C) click the OK button.

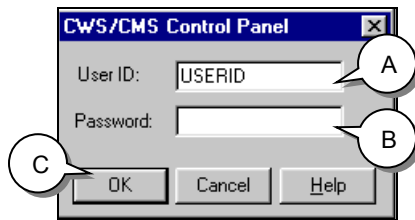


Figure – RM_009

3. From the CWS/CMS Control Panel, click the (A) Resource Management application icon.

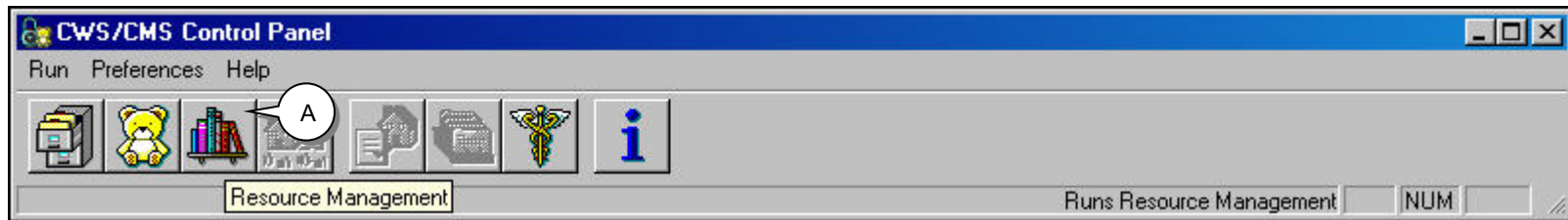


Figure – RM_010

Starting the Resource Management Application - Create a Staff Person (continued)

4. (A) Click on the County Organization Section (green button). Click the (B) Open Existing Office Folder to open the existing CWS office.

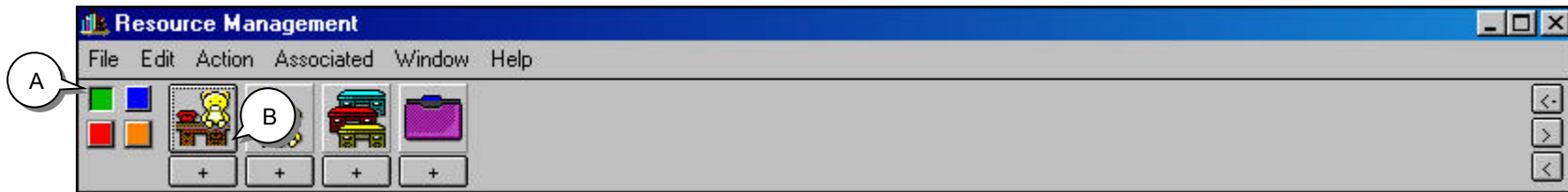


Figure – RM_011

5. (C) Click the existing office you wish to open in the Open Dialog Box, and (D) click OK.

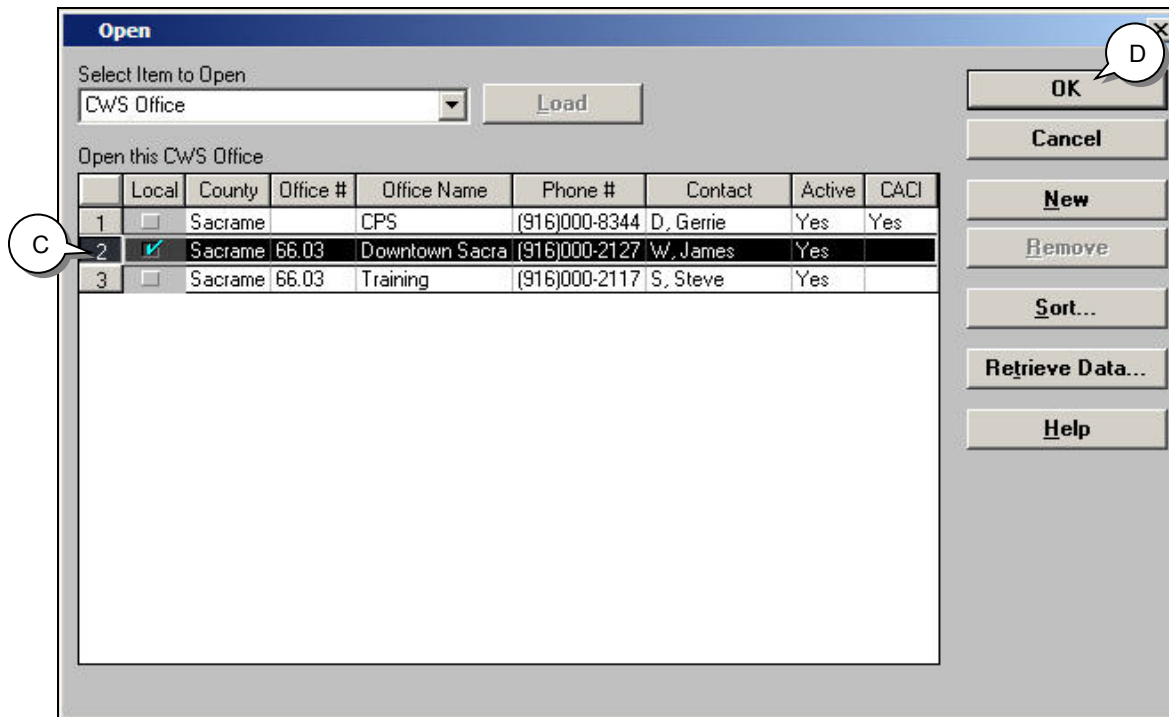


Figure – RM_012

Starting the Resource Management Application - Create a Staff Person (continued)

- Click the (A) “+” to open the Create a New Staff Person Folder to input a new staff person. Click the (B) Existing Office in the New dialog box, and (C) click OK.

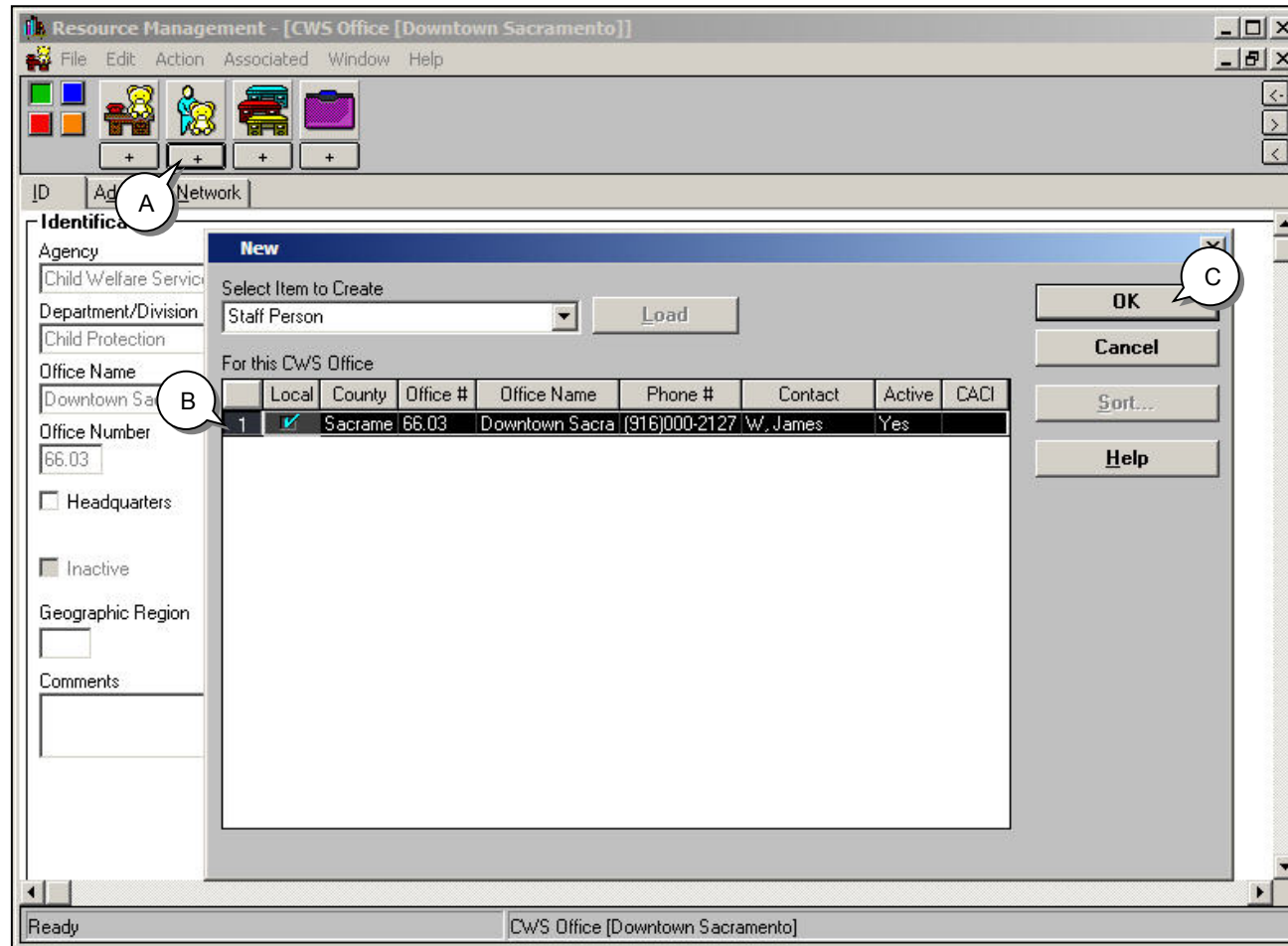


Figure – RM_013

Starting the Resource Management Application - Create a Staff Person (continued)

7. Complete all mandatory and known fields on the ID page of the Staff Person notebook.

The screenshot displays the 'Resource Management - CWS Office [] - [Staff Person [.]]' window. The 'ID' tab is selected, showing the 'Identification' section. The form contains the following fields:

- Prefix: []
- First: [Yellow highlighted]
- Middle: []
- Last: [Yellow highlighted]
- Suffix: []
- Primary Phone: [() -]
- Ext: []
- Telecommuter: ☐
- Start Date: [02/26/2004]
- End Date: []
- E-mail Address: []
- Job Title: []
- Licensing Worker ID: []
- CWS Office Address: [800 No Way, Sacramento, California 95810-]
- Availability/Location Description: []

The status bar at the bottom shows 'Ready' and 'CWS Office [] -> Staff Person [.]'.

Figure – RM_013

Starting the Resource Management Application - Create a Staff Person (continued)

8. Click the (A) Specialties page tab. (B) Click the “+” in Language grid, (C) select the language the staff person speaks, and (D) click OK. (E) Click the “+” in Functional Specialty grid, (F) select the staff person’s functional specialties and (G) click OK.

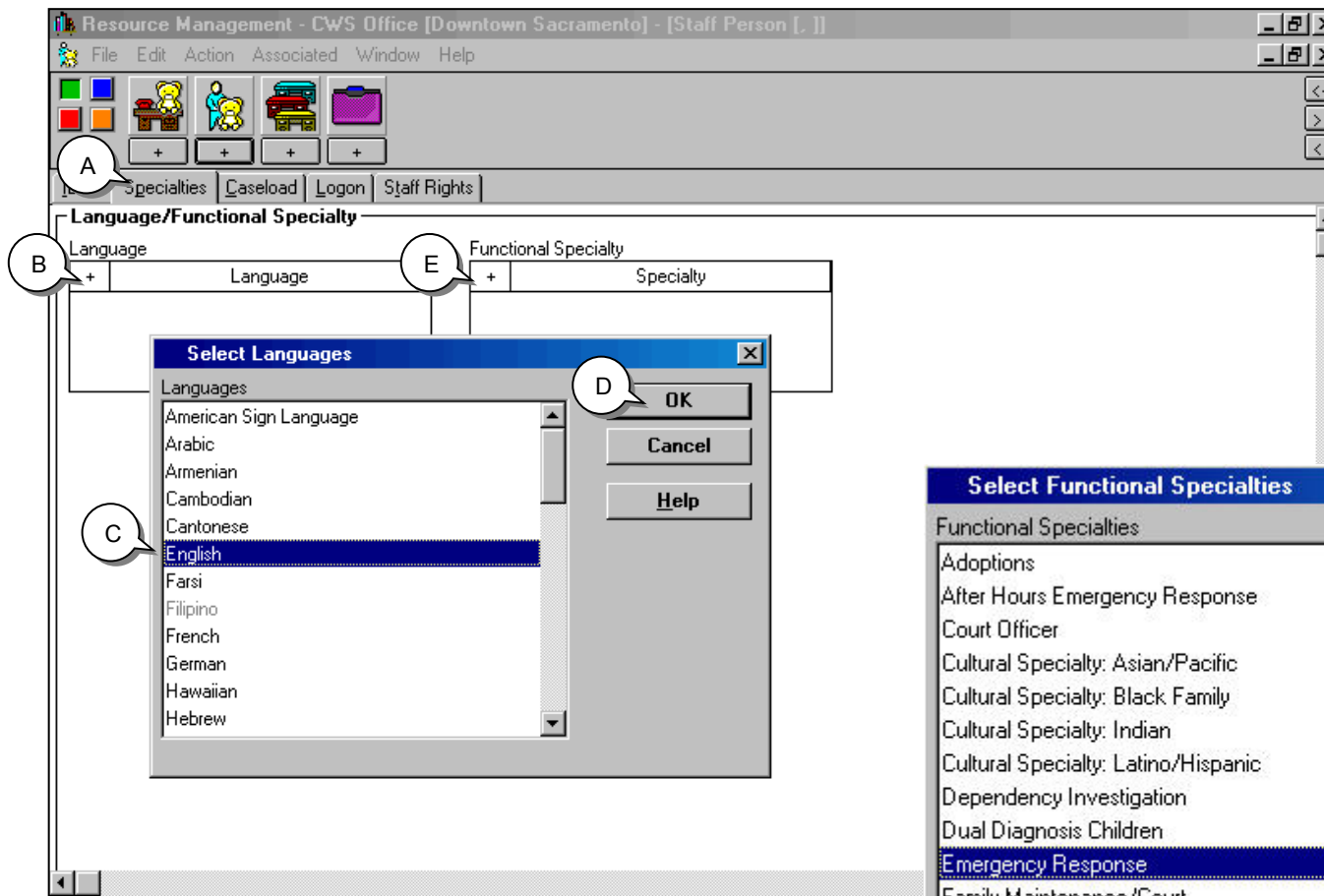


Figure – RM_015

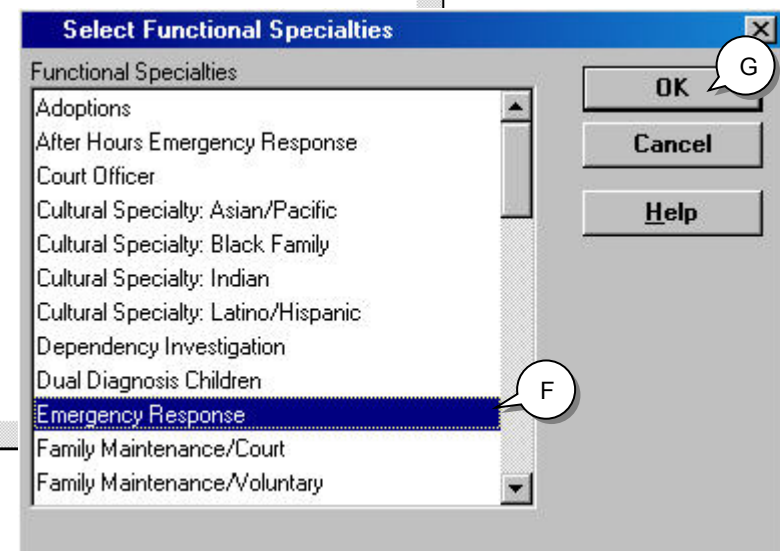
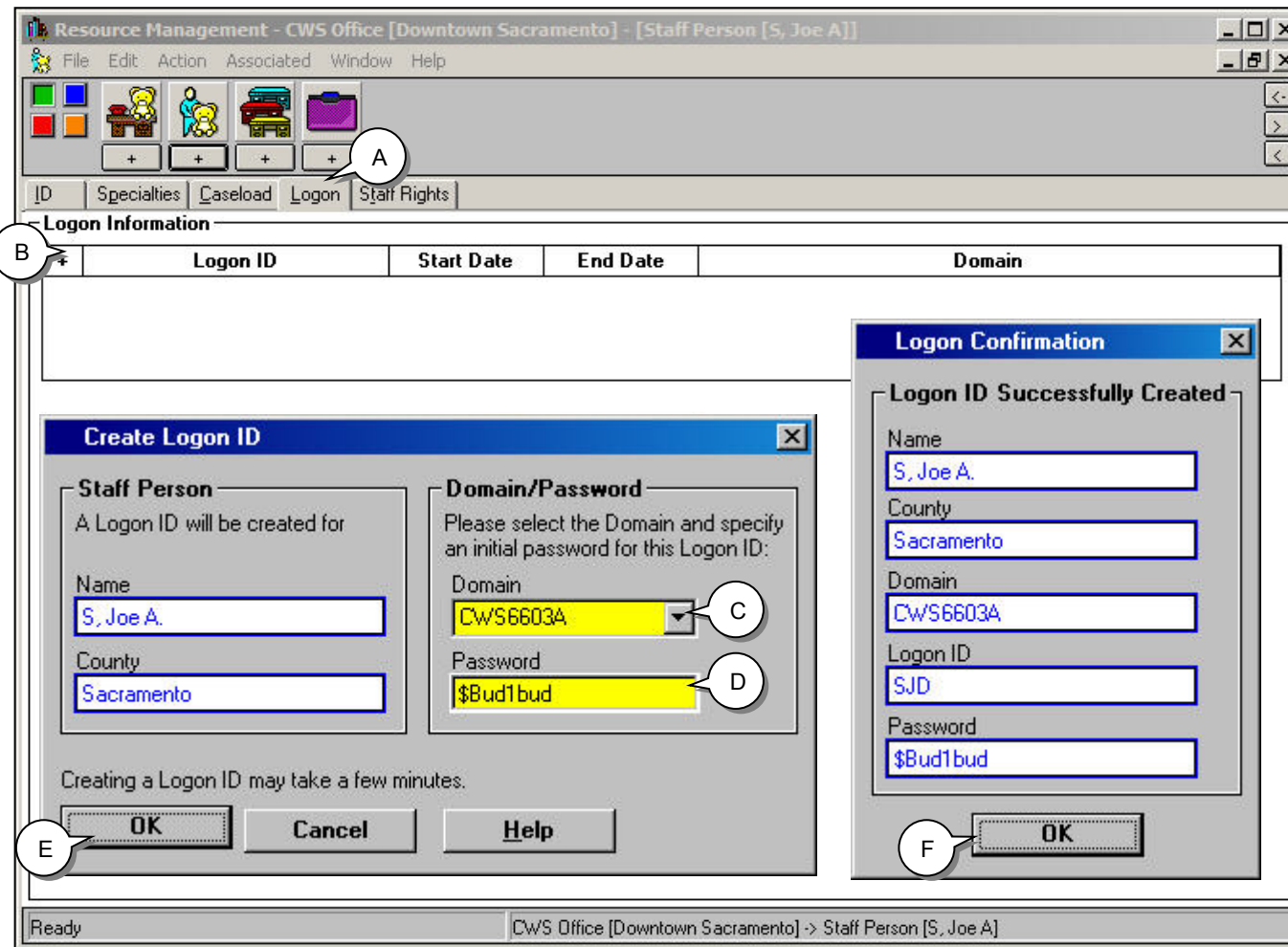


Figure – RM_016

Starting the Resource Management Application - Create a Staff Person (continued)

9. Click the (A) Logon page tab. Click the (B) “+” in the Logon Information grid, (C) select the Domain, (D) enter the Password, and (E) click OK. When the Logon Confirmation dialog box appears (F) click OK.



Password Requirements: The user's password is case sensitive and must contain:

- At least one alphabetic uppercase letter (A – Z) and/or at least one national character (#, @, \$)
- At least one alphabetic lower case letter (a – z)
- At least one number (0 – 9)
- Must be a total of eight characters

Figure – RM_017

Starting the Resource Management Application - Create a Staff Person (continued)

10. Click the (A) Staff Rights page tab. Click the (B) “+” sign in the Staff Rights grid to enter the staff person’s privileges and authorities.
11. Complete all mandatory and known fields on this page.

Resource Management - CWS Office [Downtown Sacramento] - [Staff Person [S, Joe A]]

File Edit Action Associated Window Help

Specialties Caseload Logon **Staff Rights**

Staff Rights

	Category	Privilege
+		
1	Access Authority	CWS Case Management System

Category: Access Authority Privilege: CWS Case Management System

Level of Authority: User

Ready CWS Office [Downtown Sacramento] -> Staff Person [S, Joe A]

Figure – RM_018

Create an Assignment Unit

An existing office must be showing in cache before the system will allow you to create an assignment unit for that office.

1. Use the Create a New Assignment Unit to enter a new assignment unit. (A) Click the Open Existing Office notebook, (B) select the Office in the Open dialog box, and (C) click OK.

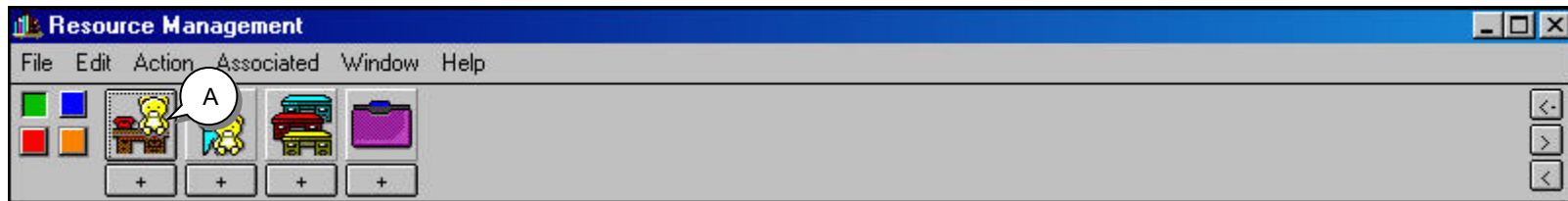


Figure – RM_019

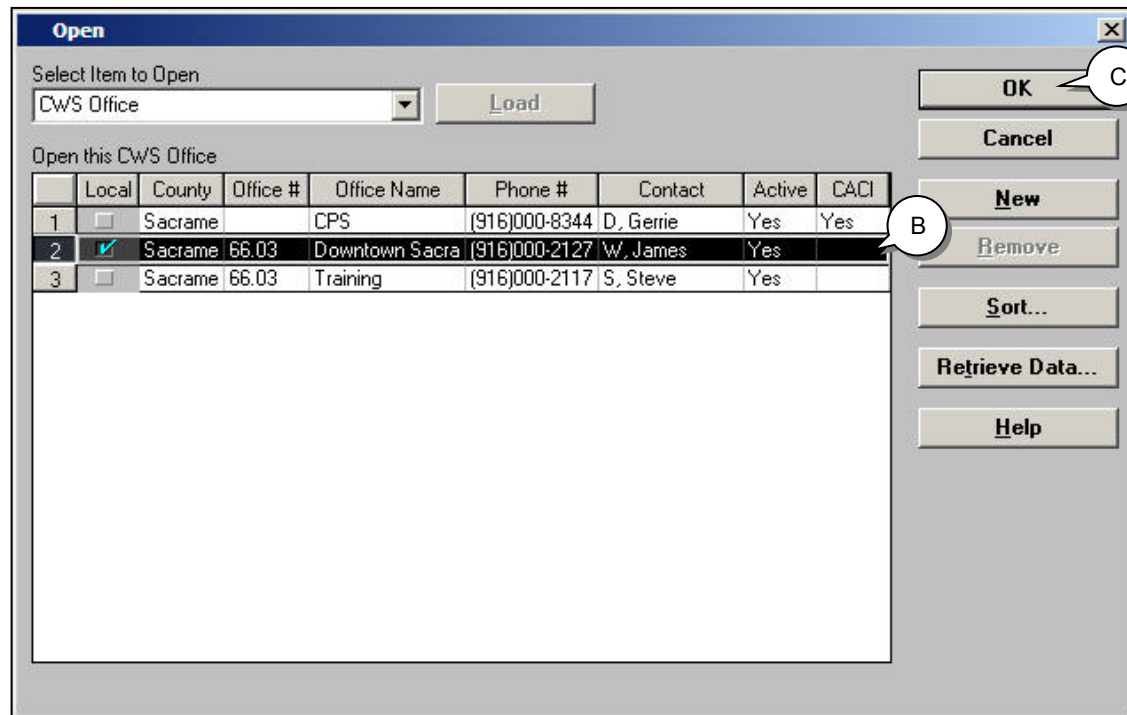


Figure – RM_020

Create an Assignment Unit (continued)

- (A) Click the (+) to open the Create New Assignment Unit Folder. Complete all mandatory and known fields on the ID page of the Assignment Unit notebook.

The screenshot shows the 'Resource Management - CWS Office [Downtown Sacramento] - [Assignment Unit [Family Reunification]]' window. The 'Unit Identification' section contains the following fields:

Unit Name	Phone Number	Ext	Functional Specialty
Family Reunification	(916) 000-4735	201	+ Specialty

Below these fields are 'Start Date' (09/21/2004) and 'End Date' (empty). There is also an 'Assignment Desk' checkbox.

The 'Select Functional Specialties' dialog box is open, showing a list of specialties. 'Family Reunification/Court' is selected.

Functional Specialties
Family Maintenance/Voluntary
Family Preservation Program
Family Reunification/Court
Family Reunification/Voluntary
Hard to Place Children
Hearing Impaired Children/Family
High Risk
HIV Counseling
Independent Living
Institutionalized Custodial Care
Intake and Detention Control
Intake Screening/Child Abuse Hotline

The dialog box has 'OK', 'Cancel', and 'Help' buttons.

The **Functional Specialty** grid should be used to identify the type of Assignment Unit which is being created.

Figure – RM_021

Create an Assignment Unit (continued)

- Click the (A) Staff Authority page tab. Click the (B) “+” in the Staff Authority grid. Choose Patricia F (C) from the Staff Name drop-down list. In the Authority field, choose the level of authority (D) needed for the staff person.

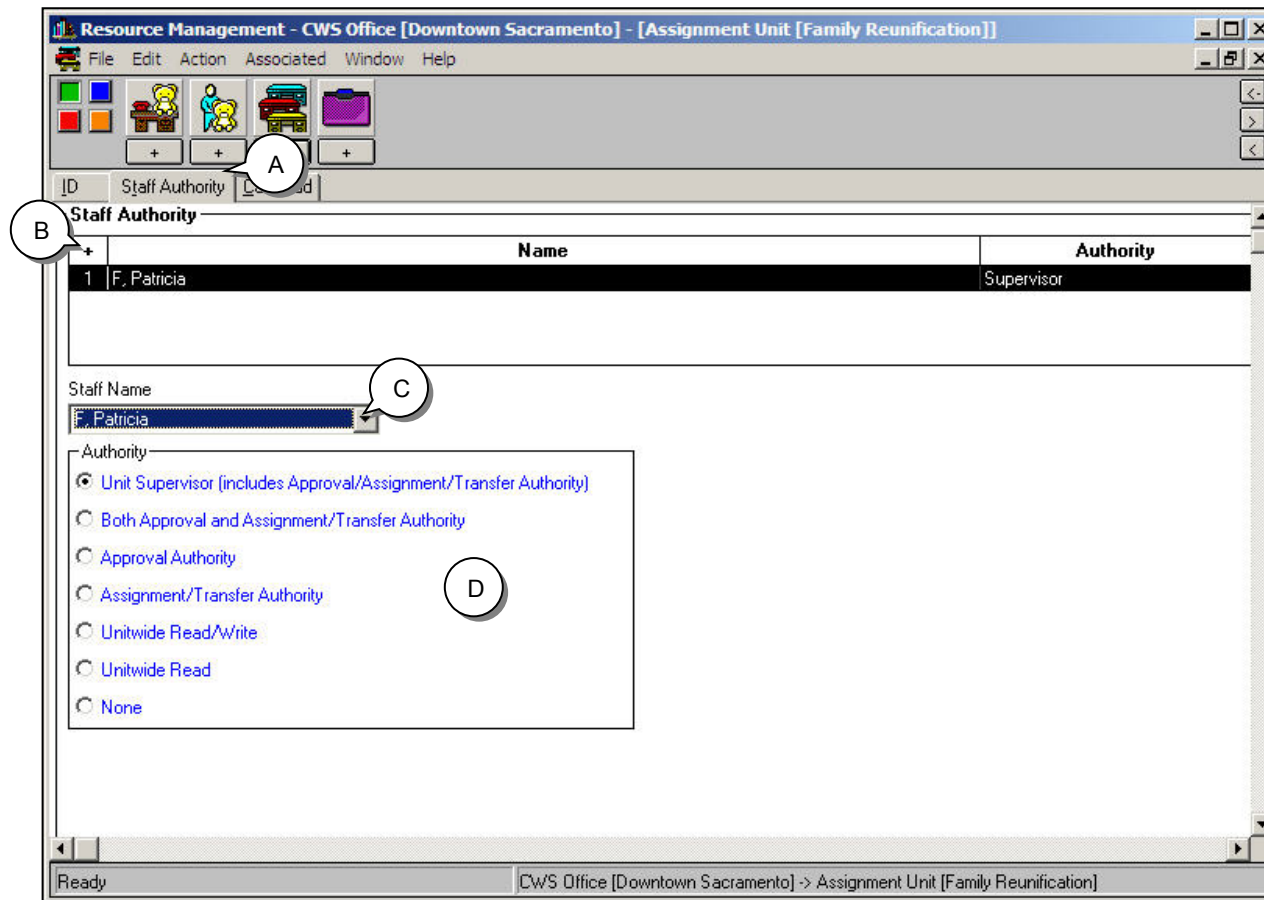


Figure – RM_022

Create an Assignment Unit (continued)

- Click the (A) Caseload page tab. Click the (B) “+” in the Caseload grid, (C) enter the Number/Name of the caseload and (D) the Start Date.

Resource Management - CWS Office [Downtown Sacramento] - [Assignment Unit [Family Reunification]]

File Edit Action Associated Window Help

Number/Name Ceiling

	Number/Name	Ceiling
1	In-box caseload	
2	FR 1	

Number/Name: FR 1 Ceiling: .

Start Date: 09/27/2004 End Date: .

☐ Assignment In Box ☐ On Hold

Ready CWS Office [Downtown Sacramento] -> Assignment Unit [Family Reunification]

Figure – RM_023

Create an Assignment Unit (continued)

Assign the Caseload

1. (A) Click the Action drop-down menu and (B) select Reassign Caseload. Complete the Reassign Caseload dialog box to indicate whom the caseload is being assigned “From Staff Person” and “To Staff Person”. (C) Select the caseload that is being reassigned (D) then click Add. This will move the caseload to the newly assigned Staff Person. Once you have finished selecting all caseloads to add, (E) click OK. (F) Click the File drop-down menu, and (G) select Save to Database, and click Exit CWS/CMS.

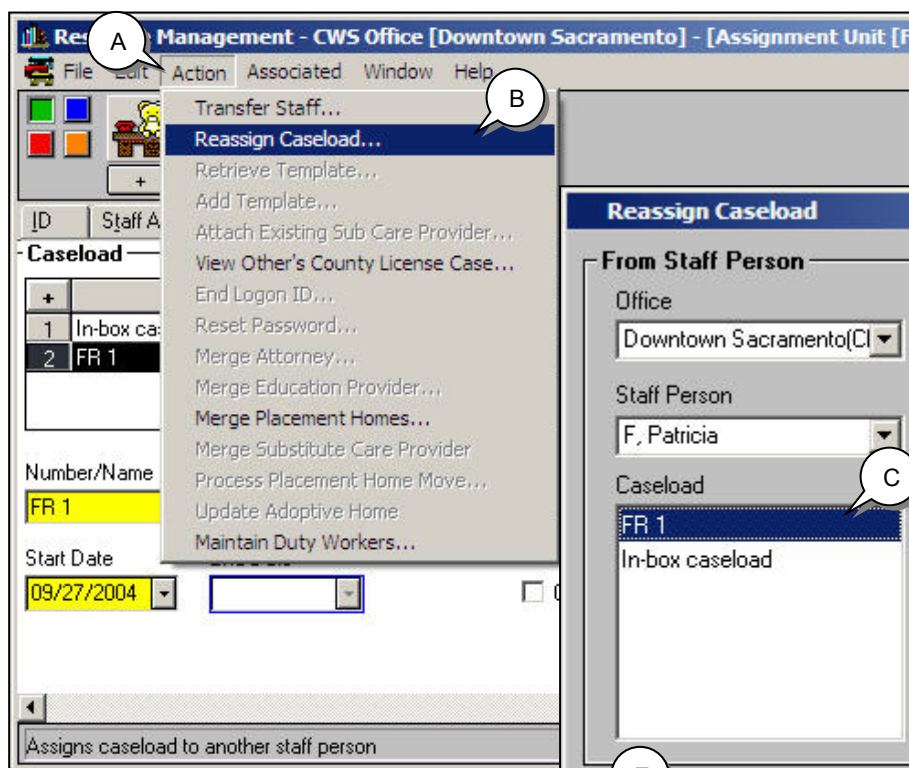


Figure – RM_024

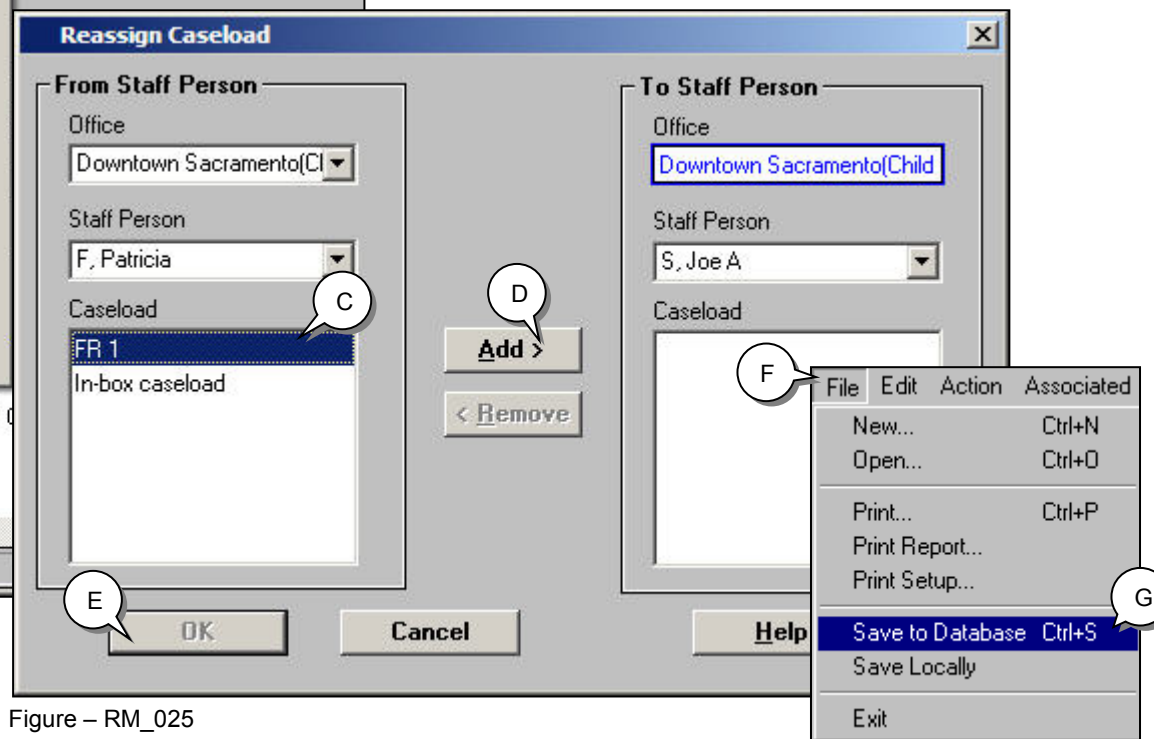


Figure – RM_025

Figure – RM_026

Skill Building Exercise: Generating a Program Management (PM) Report

Scenario Manager File: [M05_S02] - Resource Management (Part 1).arc

User ID = WALLACG

Password = \$Good2go

Background Information

Again, the County Office Administrator is out on leave. You have been temporarily assigned as the backup County Office Administrator. You have been asked by the Licensing Bureau to run a Program Management (PM) report regarding the ethnicity summary of clients and print the results.

In this exercise, you will learn where pre-programmed Program Management (PM) reports are kept in the system, how to run them, and how to send them to the printer.

Starting the Resource Management Application - Running a Program Management (PM) Report

To start the CWS/CMS Control Panel and the Resource Management application, follow these steps:

1. From the Windows desktop, double-click the CWS/CMS icon.



Figure – RM_027

2. In the CWS/CMS Control Panel login window, (A) verify your User ID, (B) type your password, and (C) click the OK button.

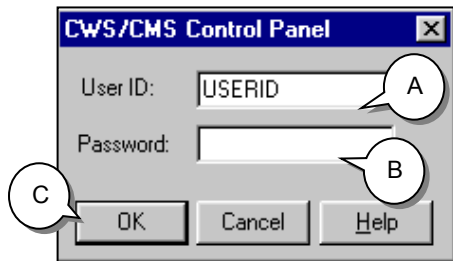


Figure – RM_028

3. From the CWS/CMS Control Panel, click the (A) Resource Management application icon.

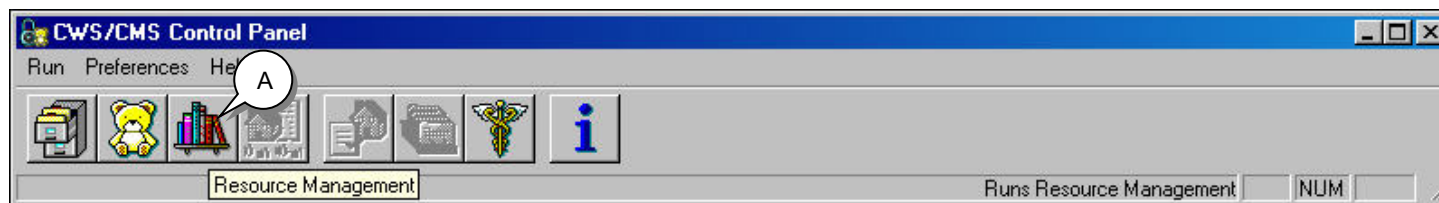


Figure – RM_029

4. From the Resource Management Control Bar, click File (A) on the Menu Bar.

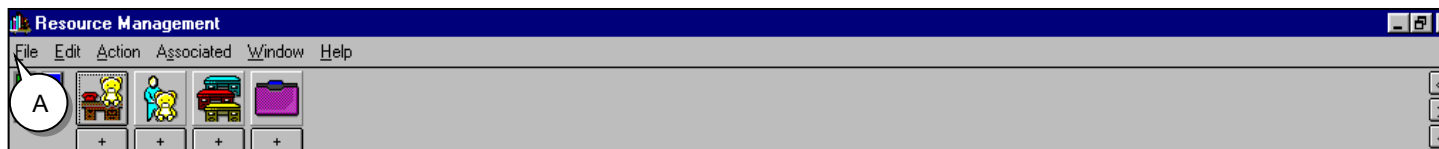


Figure – RM_030

Starting the Resource Management Application - Running a Program Management (PM) Report (continued)

5. Select (A) Print Report. From the Print Report dialog box, change the (B) Area of Interest drop-down choice to Program Management – Licensing.

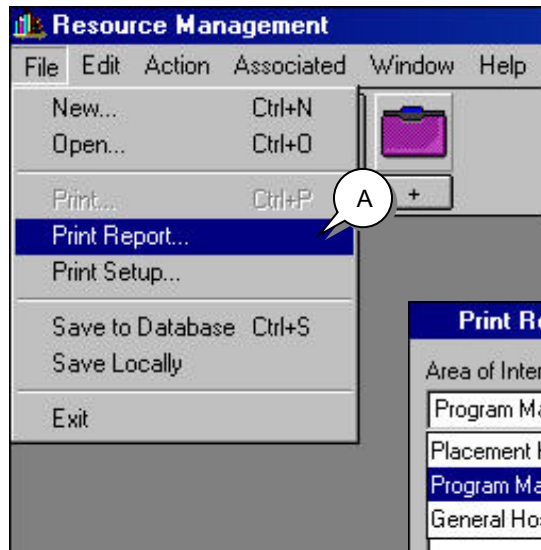


Figure – RM_031

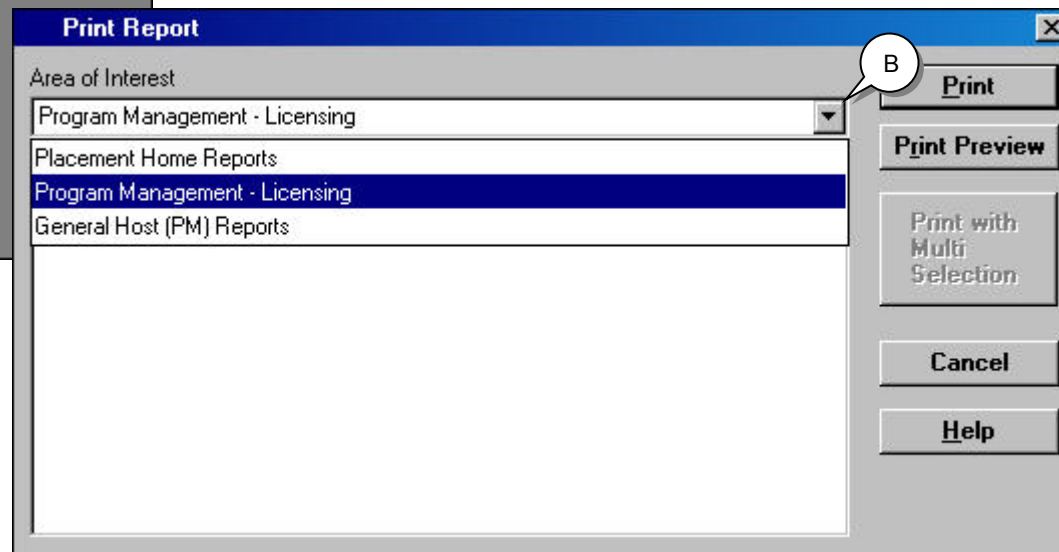
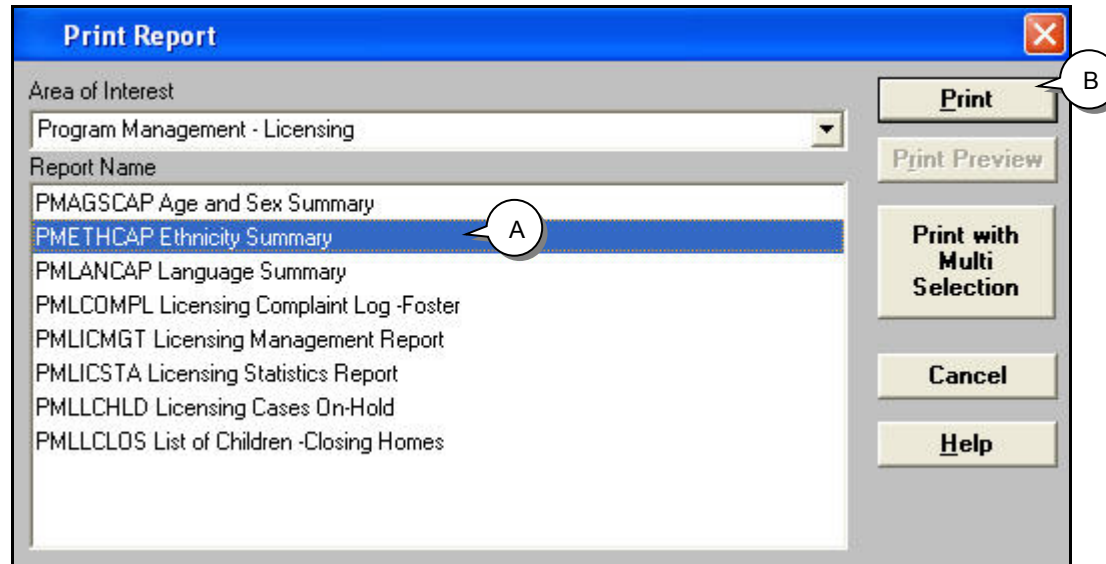


Figure – RM_032

Starting the Resource Management Application - Running a Program Management (PM) Report (continued)

- From the list of reports, click (A) PMETHCAP Ethnicity Summary once. If you need data for just one time period, i.e., one month, quarter, year, then click the (B) Print button.



Print with Multi Selection: The Print with Multi Selection button should be used if you need multiple selections of data, e.g., more than one time period, office, agency, county or month.

Help: The Help button can be used to further understand the Print Report dialog box.

Figure – RM_033

Starting the Resource Management Application - Running a Program Management (PM) Report (continued)

- Since we chose the Print button in the PMETHCAP Ethnicity Summary dialog box, you will only need to enter a date in (A) the Period End Date field. Click (B) OK. Your report will be sent directly to the default printer specified for your system. Some PM Reports can be generated in Excel.

PMETHCAP Ethnicity Summary

Period

☒ Monthly ☐ Quarterly ☐ Annually ☐ Weekly

☐ Statewide Report ☐ Create Report in Excel Format

Multiple Date Range

First Period End Date: []

Period End Date: [07/31/2005] (A)

Include

County: Sacramento

Agency: []

Region: []

Caseload: []

Calendar: July, 2005

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Buttons: OK (B), Cancel, Help

It will not matter what date you choose from the drop-down calendars, the dates will default to the last day of the selected month.

Figure – RM_034

Saving to Database

From the File drop-down menu, select **Save to Database** and click **Exit CWS/CMS**.

Summary

This module provided you with an overview of the CWS/CMS Resource Management application. During the instruction of this module, you learned about the structure of the application and the concept of authorities and privileges.

You should now have a general understanding of the following topics:

- How to start the Resource Management application
- The general purpose of each section and their related notebooks
- The structure on which authorities and privileges are based
- Privileges
- Level of Authority
- Staff Authority
- Program Management (PM) Reports