NEW YORK STATE | Office of Children and Family Services

CONNECTIONS Tip Sheet

Revised November 2015

Adding a User to CONNECTIONS

Adding a user to CONNECTIONS is a multiple step process that requires (1) the establishment of a Human Services Enterprise Network (HSEN) account using the Webstar application,(2) the granting application access to CONNECTIONS (in Webstar) and (3) the assignment of a unit and security business functions in CONNECTIONS. These steps are done by the Local Security Administrator (LSA) in Webstar and the Security Coordinator in CONNECTIONS. Both roles may/may not be assigned to the same person. This Tip Sheet outlines the basic steps necessary in both systems to create a functioning account in CONNECTIONS.

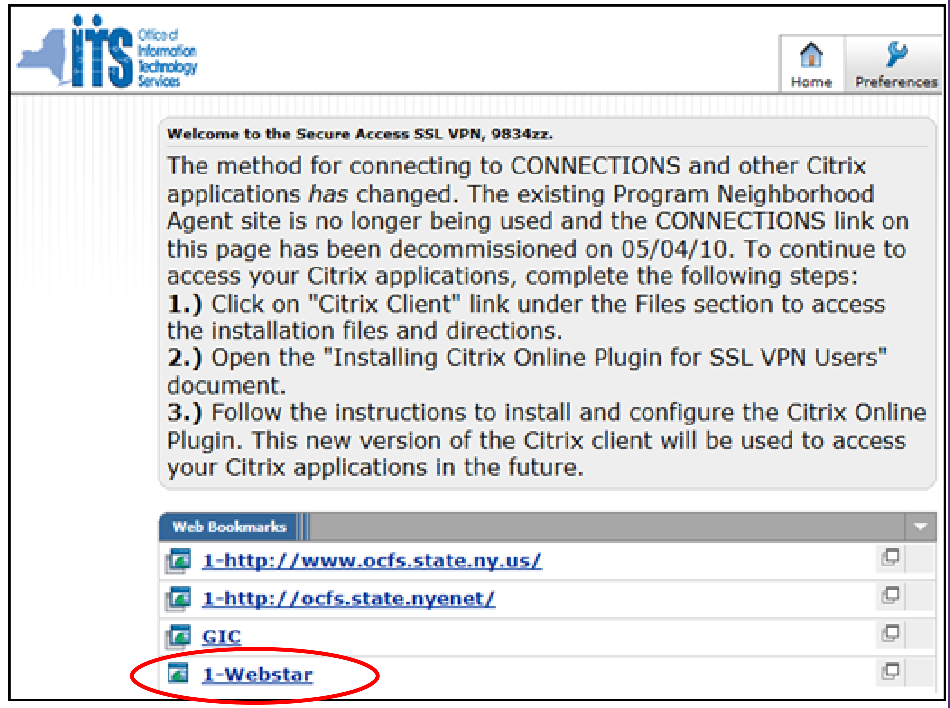
Accessing the Webstar Application

The following steps require an Administrative (ADM) account and are done by a Local Security Administrator (LSA).

You must be logged in to the state network to access the Webstar application.

- If you are using a LAN connected state computer, open your internet browser and go to: **https://webstar.oft.state.nyenet**
- If you are using an agency computer, *you must have SSL-VPN permission* in order to access the state network. Open your internet browser and go to **https://rc1.cio.ny.gov/hsen**.

- Log in with your regular User ID and password.
- On the bookmarks page, select the Webstar link.



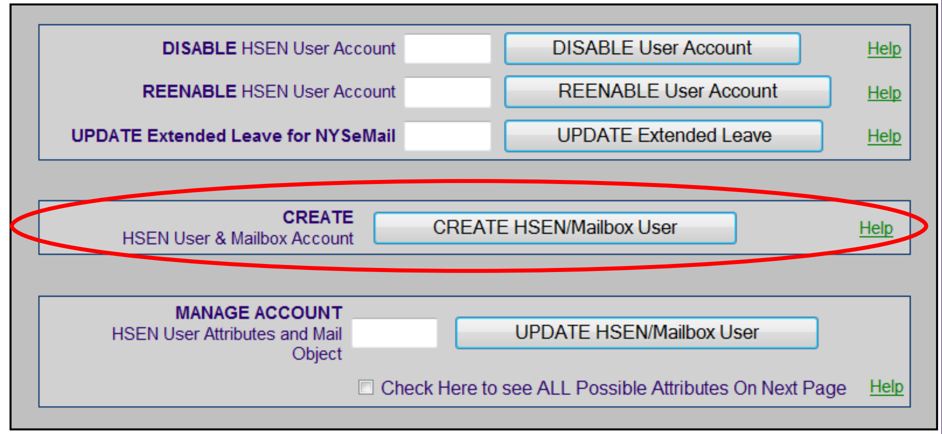
- On the Webstar Main Menu page*,* scroll down and log in to the Active Directory Administration section and enter your Administrative (ADM) password to log in.

Step 1- Create an HSEN Account

To create a HSEN account for a new user:

1. On the Active Directory Administration Menu, click the **Administer User/Mailbox** button

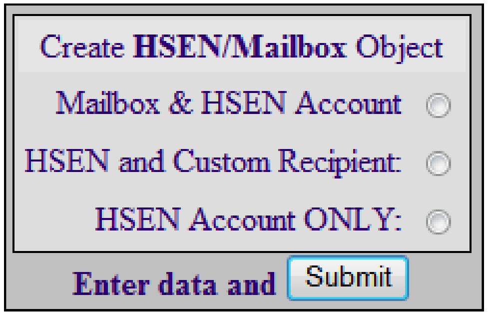
2. Click the **CREATE HSEN/Mailbox User** button.



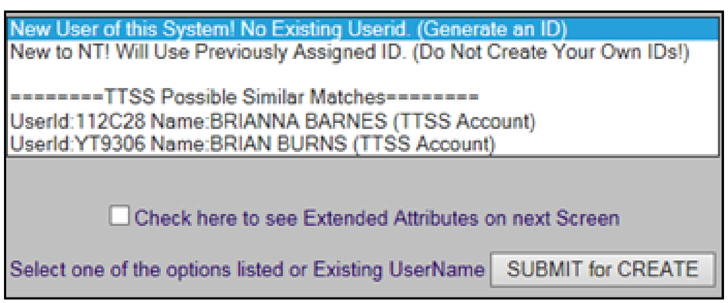
3. On the resulting screen, enter the new user's first name, middle initial and last name using upper and lower case letters.
4. Select the Organizational Unit (group) where the worker will be based. If the user's true geographic location is not listed, choose the agency's main location.

5. Add a Mailbox by choosing either “Mailbox & HSEN” (to create a state NYSeMail account in Microsoft Outlook) or “HSEN and Custom Recipient” (to use an existing agency or personal e-mail address).

   Either choice will result in having the user’s address listed in the NYS Microsoft Outlook Global Address Book, which is accessible to users on the NYS Outlook system.

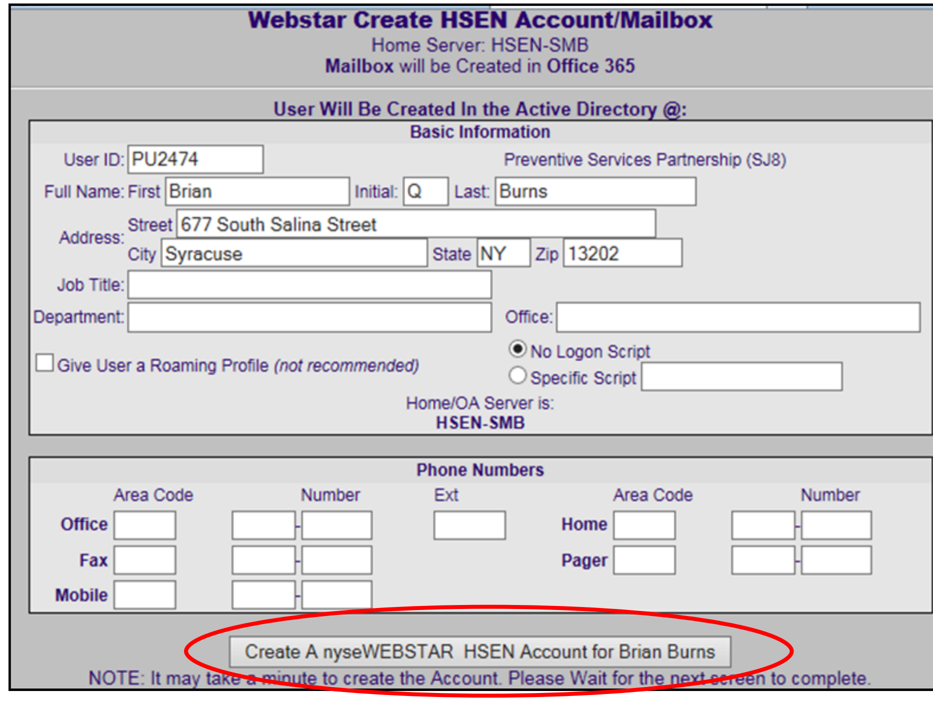


6. Click the **Submit** button.
7. Check the Possible Matches box to see if this person already has an active User ID.
   - If the user has a User ID *with your agency*, note the account number so you can re-enable it instead of creating a new one.
   - If the user has an ID, but *with another agency*, you will need to continue to create a new User ID with *your* agency.
8. Highlight “New User of this System! No Existing Userid (Generate an ID)” and click the **Submit for Create** button.



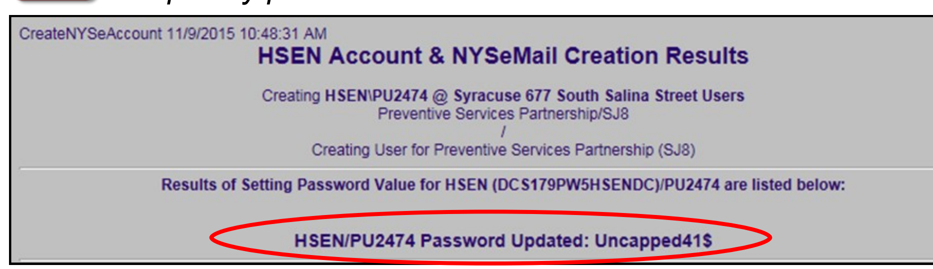
9. On the Create HSEN Account page, enter the pertinent demographic information for the new user. This information will display in the Outlook Global Address Book.

This information should be updated in Webstar and CONNECTIONS whenever there is a change.



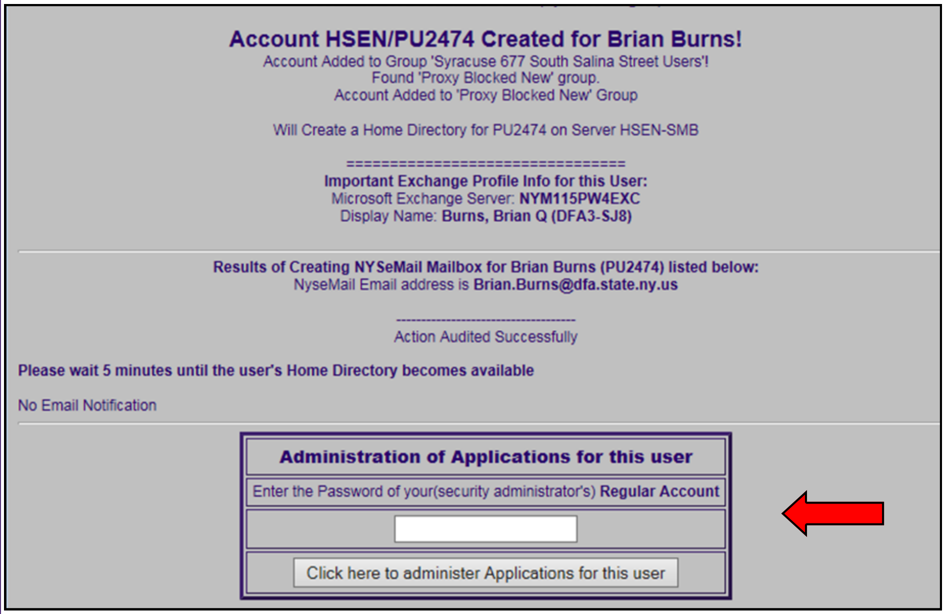
10. Click the ***Create A nyseWebstar HSEN Account*** button.
11. Print the resulting “HSEN Account & NYSeMail Creation Results” page.

This page lists the new HSEN ID number and the temporary password for the new account.



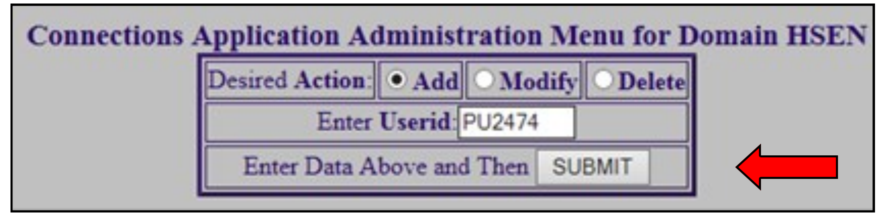
Step 2 - Administer Application Access

1. To grant the user access to the CONNECTIONS application, scroll down on the Creation Results page and sign in to the "Administration of Applications for this user" section using your regular account password.

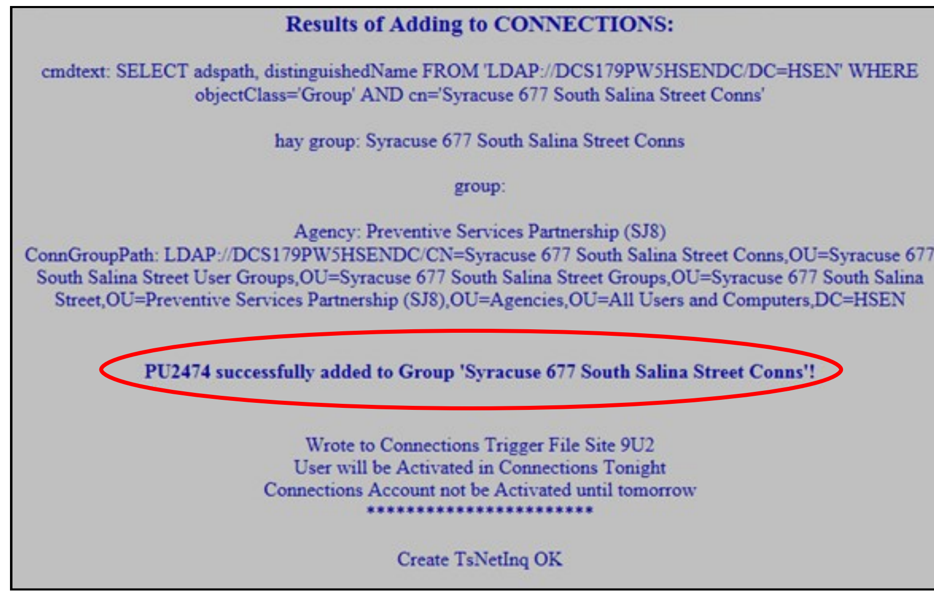


Note: This window can also be reached by logging in to the "Administer APPLICATION Access" field on the main Webstar page.

2. Click the **CONNECTIONS Application** button.
3. On the Connections Application Administration menu, select the **Add** radio button and enter the newly created HSEN ID.



4. Click the **Submit**. button.
5. Select the worker's job location then click the **Submit** button.
6. Review the Results of Adding to CONNECTIONS page to be sure the account was successfully added.



NOTE: *Adding access to the CONNECTIONS Application is a "batch process" that must be processed overnight. The new worker will appear in CONNECTIONS the next day assigned to a temporary ("Conversion") unit.*

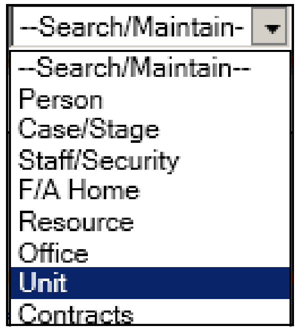
Users cannot be assigned security or assigned a workload until they are moved from the conversion unit to a permanent unit.

Step 3 - Tasks in CONNECTIONS

To be completed, at the earliest, the next day (after the over-night batch) by the CONNECTIONS Security Coordinator.

Move the worker from the Conversion Unit

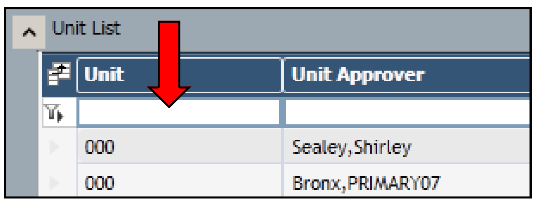
1. Select **Unit** from the Search/Maintain drop-down menu**.**



2. Enter the name of the unit and/or site to which the worker will be assigned in the appropriate fields and click the **Search** button.

Navigation Hints: Smaller districts or agencies may find it easier to just click the **Search** button to return all units.

You can also use the filter bar to specify a particular unit from the search results



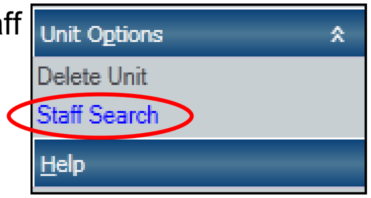
3. Highlight the unit to which the worker will be assigned.

   *The **Detail** tab opens and displays everyone currently assigned to the unit*.

   Note: This assumes you will be adding the worker to an existing unit.

   If a new unit must be created, please see the CONNECTIONS Security Tip Sheet, *"Working with Units"* for information on how to add a unit.

4. In the Unit Detail window, click on the **Staff Search** link in the left navigation pane to open the Staff Search window.



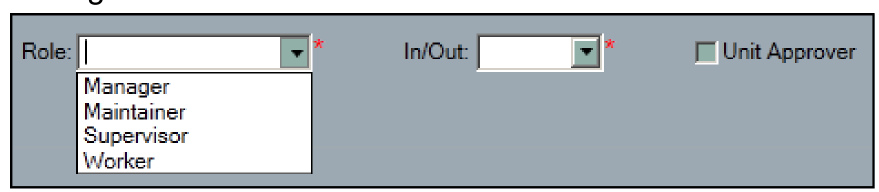
5. Enter the last name of the worker to be added and click the S***earch*** button.

   - If you wish to add multiple users to a unit at once, do not enter a last name; click the **Search** button to return a list of all agency staff.
   - You can narrow your search by entering a site code if your agency has more than one site.

6. Highlight the name of the worker (check the checkboxes next to multiple names if you are adding more than one person to the unit).

7. Click the **OK** button, at the lower right of the grid, to add the selected worker(s) to the unit and return you to the unit widow.

8. With a worker highlighted, scroll down to the **Detail** tab, and use the drop-down Role menu to choose the role you wish to assign.



Roles do not necessarily correspond with job titles!

Roles simply indicate the hierarchy of positions within a particular unit. They are used in conjunction with the Unit Sum Access business function to grant access to the workloads within the unit. From lowest to highest, the roles are: Worker < Supervisor < Maintainer < Manager.

NOTE - Some corrective actions in CONNECTIONS (e.g., maintaining a closed investigation stage) require the correct business function ***plus*** a unit role of Supervisor or above.

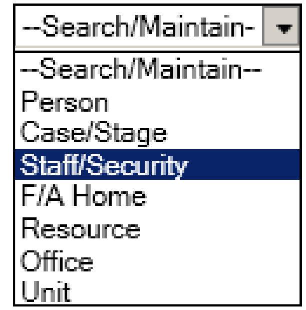
8. In-assign the worker to their primary work location unit.
   - A worker can be assigned to multiple units, but must have one – and only one - "In" assignment.

When work is submitted for approval, it goes to the Unit Approver of the unit where the worker is In-Assigned.

9. Assign Unit Approver status, if needed, by clicking on the **Unit Approver** checkbox.
   - There can be only one approver per unit and every unit must have an approver.
   - You must remove the Unit Approver designation (and click the **Modify** button) from one approver before you can appoint another.
   - The Unit Approver may be In or Out assigned to the unit.
   - **You cannot save the changes to the unit and exit this window until a Unit Approver has been selected.**
10. Click the **Modify** button; then click **Save** button (or **Save and Close** if all changes to this unit have been made).

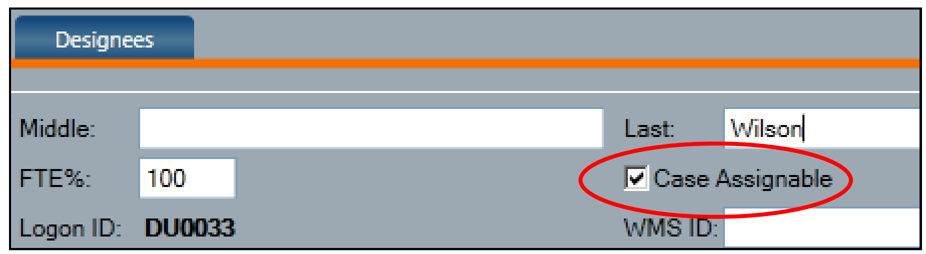
Once the Conversion unit is empty - except for the temporary Unit Approver ("Person, Conversion") - the unit should be deleted. Please see the CONNECTIONS Security Tip Sheet, *"Working with Units"* for information on how to delete a unit.

Enter Worker Information



1. Using the Search/Maintain drop-down menu, choose **Staff/Security.**
2. Click **Search** to display a list of your entire agency's staff or enter the worker's name to locate them specifically.
3. Highlight the desired worker's name to open the **Detail** tab for that worker.
4. On the **Detail** tab, click the **Case Assignable** check-box if the worker will be assigned cases.

If the worker will not be carrying a caseload, leave this box unchecked.



5. Using the drop-down menu, choose the appropriate "Category" for the worker. This will appear in the Staff listing for this worker in CONNECTIONS.

NOTE - "Category" is NOT the same thing as "Job Type" for Security purposes – it only describes the type of work this worker does.

6. Click the **Save** button.
7. Click the **Address** tab, complete information in the Address window and click the ***Save*** button.
8. Click the **Phone** tab, complete information in the Phone window and click the **Save** button.
9. If desired, enter information in the **Skills** tab.

<u>Assign Security Business Functions</u>

Changes to security take effect when the worker next logs into CONNECTIONS. Workers may log off and log on again for changes to take effect immediately

1. With the worker still highlighted, click the **Security** tab.
2. Assign Business Functions as appropriate.by double clicking on the checkboxes corresponding to the business functions the worker requires to complete their job duties.

	Business Functions
☐	CASE/PERS SRCH
☑	CPS CASEWORKER
☐	CPS SUP LIMITED
☐	CPS SUPERVISOR
☑	CREATE FSI
☑	ENTER PROG NOTE

See the CONNNECTIONS Security TIP Sheet, "*Understanding Business Functions*" for more information.

- Any person given access to CONNECTIONS will automatically be assigned the "Standard Access" Business Function. This function grants access to the worker's own Workload and To-Do tabs.
- ***Additional business functions should be assigned only if additional access is needed.***

2. *Assign Job Types,* ***only if your agency uses this as part of it's security structure.***

Job Types are used in conjunction with the Agency Access and Organizational Hierarchy functions to grant caseload access across job types, or via direct supervisory lines within the entire agency. Not all agencies use this feature.

	Job Types
☐	FISCAL STAFF
☑	FOSTER CARE CASEWORKER
☐	FOSTER CARE DIRECTOR
☐	FOSTER CARE SUPERVISOR
☑	HOME FINDER
☐	HOME FINDING SUPERVISOR

Do not assign ***any*** *Job Type if your agency does not use this form of security structure.*

3. Click on the **Modify** button, then **Save** or **Save & Close**.

Additional Considerations

In order for a worker to access CONNECTIONS, they may need additional permissions.

- Users who access CONNECTIONS via their agency's own network must be granted access to that network.
- Agency or district users who have high-speed Internet access, may access CONNECTIONS directly over the internet via the URL https://connections.ocfs.ny.gov.

  If using non-state owned equipment, a one-time download of the Citrix Receiver is required. To download this, a user *with administrative rights* to the computer/laptop/tablet must navigate to this URL, sign in and follow the pop-up instructions to download the client.

Once the download is complete, open the CONNECTIONS application by double-clicking the correct icon.

- If a user needs to access Webstar, the OCFS Intranet and/ or the Data Warehouse from a *non-state owned* computer, SSL-VPN access must be requested from the NYS Information Technology Services (ITS).

See http://www.ocfs.state.ny.us/main/vpn/sslvpn for the required SSL-VPN request form and submission instructions.

Important Links for SSL-VPN users

- To log onto CONNECTIONS via the Internet:

  https://CONNECTIONS.ocfs.ny.gov

- To log onto the state network to get to Webstar, the Data Warehouse or the OCFS Intranet from a non-state-owned computer (requires SSL-VPN permission and download of the Citrix Receiver) :

  https://rc1.cio.ny.gov/hsen

- To reach resources on the CONNECTIONS Internet website:

  http://ocfs.ny.gov/connect

- To access an HSEN email account (Outlook Web Access) over the internet:

  https://login.microsoftonline.com

Resources

- CONNECTIONS Job Aids and Tip Sheets:

  http://ocfs.state.nyenet/connect/jobaides/jobaides.asp

- CONNECTIONS Regional Implementation Staff:

  http://ocfs.state.nyenet/connect/contact.asp

- CONNECTIONS Application Help Mailbox:

  ocfs.sm.conn_app@ocfs.state.ny.us
  (NOTE: address contains an underline)

- CONNECTIONS Communications Mailbox:

  connectionsi@ocfs.ny.gov

ITS Enterprise Service Desk
1-800-697-1323