CONNECTIONS Security Tip Sheet

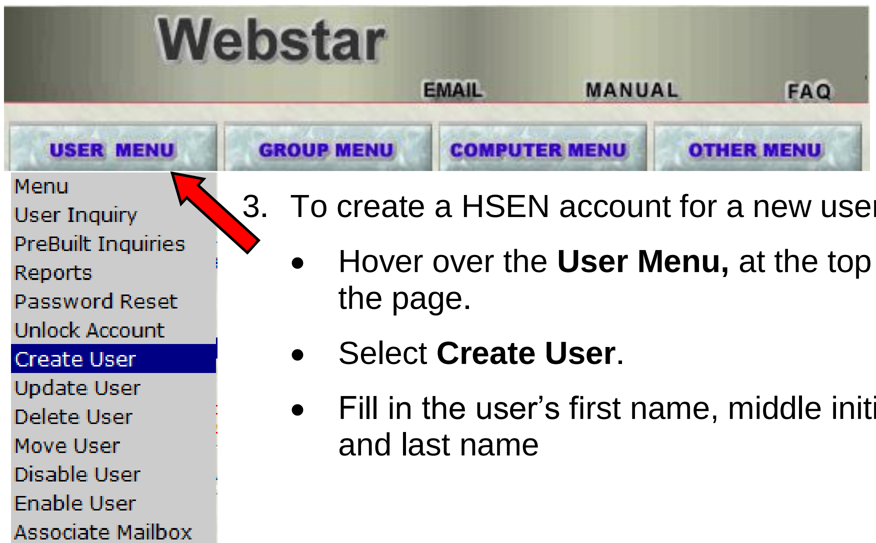
Adding a User to CONNECTIONS

May 2013

Adding a user to CONNECTIONS is a multiple step process that requires (1) the establishment of a HSEN (Human Services Enterprise Network) 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.

Step 1 - Create the HSEN Account in Webstar

1. Open your Internet browser and, using your regular (***not ADM***) User ID, log in to the nyseWebstar application.
   - If you are using a state computer go to: https://webstar.oft.state.nyenet/nyseWebstar/
   - If you are using an agency computer, log in to https://rc1.cio.ny.gov/hsen with your **regular** User ID and password. On the bookmark page, select Webstar.
2. From the Webstar Main Menu page, scroll down and log in to the Active Directory Administration section using your Administrative (**ADM**) password. This will bring you to the Active Directory Administrative Menu.



3. To create a HSEN account for a new user:
   - Hover over the **User Menu,** at the top of the page.
   - Select **Create User**.
   - Fill in the user's first name, middle initial and last name
   - Choose an "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.
4. Add a Mailbox by choosing either Mailbox & HSEN account (creates a state NYSeMail account in Microsoft Outlook) or Mail Enabled User & HSEN account: aka "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.
5. Click the **Submit** button.
6. 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*, **STOP**. 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.
7. Highlight "New User of this System! No Existing Userid (Generate an ID)" and click the **Submit for Create** button.
8. On the Create HSEN Account page, enter in the pertinent demographic information for the new user. This information will display in the Outlook Global Address Book.
   - **NOTE:** *This information should be updated in Webstar and CONNECTIONS whenever there is a change.*

9. If you are creating a Main Enabled (Custom Recipient) account, enter the user's email address.

   - **NOTE:** If you are creating a NYSeMail account, ***there is an additional step in the mailbox creation process*****.** You must re-enter Webstar after 24 hours to "associate" the mailbox with the User ID. To do this:

     - Hover over the **User Menu**
     - Select **Associate Mailbox**
     - Enter the new User ID
     - Click the ***ENABLE the NYSeMail Mailbox*** button**.** The mailbox will be enabled the next day after an overnight batch.

10. Click the ***Create A nyseWebstar HSEN Account*** button.

11. **IMPORTANT!** Print the resulting "HSEN Account & NYSeMail Creation Results" page – this 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" section using your regular account password. Click on the ***CONNECTIONS Application*** button, then log in with your **ADM** password.

   This window can also be reached by logging in to the "Administer 3 APPLICATION Access" field on the main Webstar page.

2. On the Application Administration menu, select the **Add** radio button**,** enter the newly created HSEN ID, and click ***Submit***.

3. Select the worker's job location then click ***Submit***.

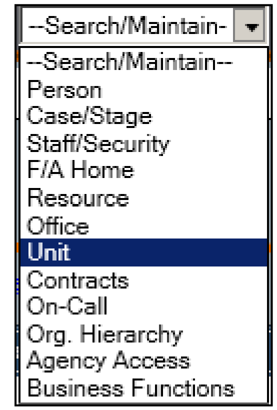
- **NOTE:** *Adding access to the CONNECTIONS Application is a "batch process" that must be processed overnight. The new worker will appear in CONNECTIONS the next day assigned to a temporary ("Conversion") unit.*

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

Step 3 - Tasks in CONNECTIONS

(*To be completed the next day at the earliest*)

<u>Move the worker from the Conversion Unit</u>



1. Using the Search/Maintain drop-down menu, choose **Unit.**

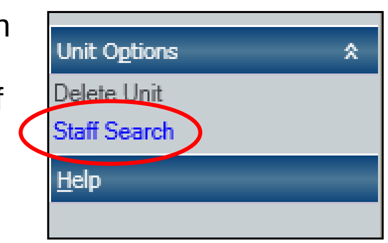
2. Enter the name of the unit and/or site to which the worker will be assigned in the appropriate fields and click the ***Search*** button.

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

3. Highlight the unit to which the worker will be assigned. The ***Detail*** tab will open and display 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 ***Search*** button.

   - If you wish to add multiple users to a unit at once, do not enter a last name; just 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) and click the ***OK*** button, at the lower right of the grid, to add them to the unit.

7. In the Detail window, scroll down and use the drop-down Role menu to choose the role you wish to assign.

   ➢ ***<u>Roles do not necessarily correspond with job titles!</u>***

   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.

8. In-assign the worker to their primary work location.

   - 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 worker's in-assigned unit.

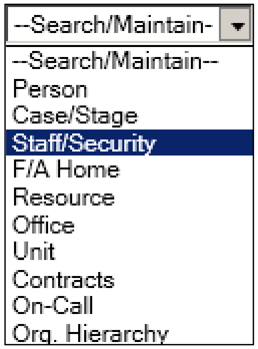
9. Assign Unit Approver status, if needed, by clicking on the Unit Approver checkbox.

   - 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.

<u>Enter Worker Information</u>



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 they 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. Click the ***Save***.

   ➢ **NOTE:** "Category" is *<u>NOT</u>* the same thing as "Job Type" for Security purposes – it only describes the type of work this worker does.

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

Assign Security Business Functions

NOTE: *Changes to security take effect when the worker next logs in to CONNECTIONS.*

1. With the worker still highlighted, click the **Security** tab and assign Business Functions as appropriate.
   - Any person given access to CONNECTIONS will automatically be assigned the “Standard Access” Business Function that grants access to their own Workload and To-Do tabs.
   - ***Additional business functions should be assigned only if additional access is needed.***
2. *Assign Job Type, only if your agency uses this as part of their 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. *Do not assign **any** Job Type if your agency does not use this form of security structure.*
3. Click on ***Modify***, then ***Save*** all changes & close out of the Staff Security window.

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 agent is required. To download this, a user *with administrative rights* to the computer/laptop/tablet must navigate to this URL, sign in and click on the ***Client Download*** tab. Use the link on the resulting page and download the correct agent (e.g.: Citrix Receiver Version 3.3).

  Once the download is complete, return to the ***Applications*** tab. Open the CONNECTIONS application by double-clicking on the black “C” icon.
- If a user needs to access Webstar, the OCFS Intranet and/or the Data Warehouse from a *non-state owned* computer, state network (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 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 Citrix to get to Webstar, Cognos 8 or the OCFS Intranet from a non-state-owned computer: https://rc1.cio.ny.gov/hsen (requires SSL-VPN permission)
- To access an HSEN Microsoft Outlook account over the internet (Webmail): https://mail.ny.gov/owa

NOTE: *Users need to include their domain (HSEN) before their User ID when signing in to Webmail.*

***Reminder**: In all areas of CONNECTIONS, you can press F1 for help*

Resources:

CONNECTIONS Step-By-Step Guides:
http://ocfs.state.nyenet/connect/jobaides/

CONNECTIONS Regional Implementation Staff:
http://ocfs.state.nyenet/connect/contact.asp

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

CONNECTIONS Communications
CONNECTIONSCommunications@dfa.state.ny.us

NYS ITS
Customer Care Center
Help Desk #
1.800.697.1323