



CONNECTIONS Security Tip Sheet

Accessing Someone Else's Workload & To-Do's

May 2013

Work within CONNECTIONS frequently requires accessing the workload or To-Do list of someone else, such as when a Supervisor reviews the work of a supervisee, approves work on behalf of a colleague or when workers need to record information in a stage on someone else's workload. CONNECTIONS has many levels of security designed to allow flexibility in assigning users access so that they can complete their authorized duties. This tip sheet covers the more common methods by which someone can access the Workload or To-Dos of another person.

Access via the Unit Summary Access Path

One basic method of granting access to the Workload or To-Do tab of another person within a unit requires that the person seeking access:

- Be a member of that unit (in or out assigned)
- Have the Unit Summary Access (UNIT SUM ACCESS) business function **AND**
- Be the Unit Approver of the unit **OR** be assigned a role in the unit *higher* than that of the Unit Approver.

These conditions grant the same full access/permissions to stages and To-Dos as the owner of the workload – including the ability to search previous history of persons on that Workload, see stages marked as sensitive, run OCI reports, make assignments and complete work in FASPs and PHRs.



REMINDER: Staff should be granted only the minimum access necessary to complete their authorized duties.

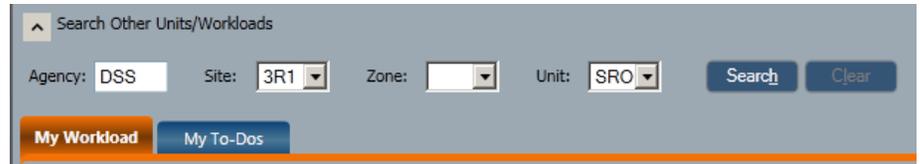
Navigating to Someone Else's Workload/To-Do list

Workers assigned the UNIT SUM ACCESS business function, will see "Search Other Units/Workloads" above the "My Workload" and "My To-Dos" tabs on their main CONNECTIONS screen.

1. Click the grey box to open the Unit Search window.



Fields in the search box will be prefilled with information about the unit to which you are In-assigned.



2. Enter the Site, Zone (if any) and Unit for which you wish to search. If you wish to access another Workload/To-do tab in your own unit, you will not have to make any changes.
 3. Click the **Search** button.
-  **Navigation Hint:** You can click on the grey box  to temporarily collapse the Staff List grid.
4. On the resulting grid, select the name of the worker whose Workload or To-Dos you wish to access
 5. Click the **Go** button at the lower right of the grid to open that worker's Workload and To-Dos tabs.

Completing Approvals when the Unit Approver is out

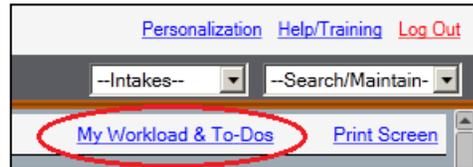
- Navigate to the **My To-Dos** tab of the absent approver, using the steps above.
- Click the **Navigate** link on the To-Do of the needed approval. This will open the item to be reviewed.
- Once you've reviewed the item, close the item to open the Approval window. To use the Reject button, you must first type in comments.



Reminder: CONNECTIONS will log the approval/rejection under the name of the person actually doing the approval, not under the name of the staff person to whom it was submitted.

To Return to Your Own Workload from Someone Else's

- Click the **My Workload & To-Dos** link in the upper right corner.



Assignee/Designee Path

A staff person who temporarily assigns their security rights to another worker is known as an Assignee. The worker receiving those rights is known as their Designee.

Assigning Designee status temporarily grants all your security rights to another worker - including those resulting from assigned business functions, unit membership and unit hierarchy. Because one's Security Profile may include powerful business functions such as Maintain Security, View Sensitive and Access Sealed Adoption, *this option should be exercised with great care.*



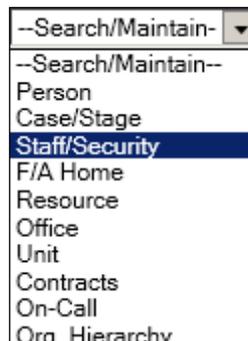
IMPORTANT! Designee status is intended to be used for time-limited, temporary planned absences such as vacations and medical leave. If longer term access is required, access should be assigned through business functions or other security paths.

Creating a Designee

- Any worker with the Maintain Designee Business Function can create their own designee assignments.

The Security Coordinator – or any staff with the Maintain Security Business function – can assign Maintain Designee Business Function.

- Using the Search/Maintain pull-down menu, choose **Staff/Security**
- Enter your name and click **Search**.



- Highlight your name, then click the **Designees** tab, below.
- Use the **Staff Search** link in the left navigation pane to locate the staff person to whom Designee status will be assigned.
- Highlight the worker's name and click the **OK** button to the lower right of the grid.
- Enter an Expiration Date in the labeled field.
- Click **Save** or **Save & Close**.

Access via the Agency Access Path

Access to FSI and FSS stages, but not CPS or FAD stages can also be granted using Agency Access and Organizational Hierarchy settings – a complex security scheme not covered in this Tip Sheet. *See the CONNECTIONS Security Step-by-Step Guide for more information on this topic.*

Specialty Path Access

Some workers, such as clerical or medical staff, may only need access to a portion of the record. For these workers, specialty paths offer a way to grant targeted access. Please see the CONNECTIONS Security Tip Sheet, "Specialty Path Access" for more information on this type of access.

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
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