CONNECTIONS

System Build 17 Job Aid

Changes to Security to Support Family Services Intake and Family Services Stages

CONNECTIONS Training Project
SUNY Training Strategies Group

CONNECTIONS - System Build 17 Job Aid
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This job aid is available online:

- In the Public Folders:
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- On the CONNECTIONS Intranet site:
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The *CONNECTIONS Security Step-by-Step Guide*, which is also available on the OCFS CONNECTIONS Intranet site, provides detailed information regarding security principles and guidelines, as well as procedures for maintaining security for pre-Build 17 system functionality.

The CONNECTIONS Intranet site also contains information about CONNECTIONS training.

> **Any visible identifying data
> in this Job Aid is simulated.**

Introduction

This Job Aid provides information about the changes to Security functions in CONNECTIONS that are being introduced with Build 17.

Specifically, this Job Aid contains information about:

- changes to the CONNECTIONS Toolbar;

- changes to the Staff Security and Unit Detail window;

- new *Organizational Hierarchy* and *Agency Access* windows; and

- new Business Functions.

Build 17 provides new security architecture to the new Case and Financial Management functionality that will be implemented with Build 18. Working in conjunction with current system security, the Build 17 security architecture will overlay the existing security structure to accommodate the needed flexibility and functionality for Family Services Intake and Family Services Stages. The security architecture in place prior to Build 17 will not change.

Glossary of Terms Used in this Job Aid

Term	Definition
Access	The user's ability to view or maintain information.
Agency Access	Access that is determined by specific permissions based on a staff grouping (e.g., All in District/Agency, All in Unit, All Non-Clerical Staff) and role (i.e., case-assignable staff, Unit Approver, direct supervisory line).
Assignee	A worker who assigns his/her Business Functions to another person (Designee).
Business Function	Security Coordinators grant access through the assignment of Business Functions.
Business Function Profile (BFP)	The complete listing of all Business Functions assigned to a staff person.
Designee	A worker who assumes the Business Functions of another person (Assignee).
Job Type	A new category designation in the *Staff Security* window that can allow access to the *Assigned Workload* of other workers with the same Job Type. (For example, someone designated as a Foster Care Caseworker could have view access to all other Foster Care Caseworkers' workloads in the district/agency, if the district/agency chose that option).
Maintain	Access that allows one to add, modify or delete data.
Office Type	OCFS (State), Regional Office, Local District, Voluntary Agency, DFY (Division for Youth), CCF, CQC, OMH, OMRDD.
Organizational Hierarchy	Access that is determined by a unit's position within an organization.
Role in a Case	The role assigned to a staff person to work on a case (or on a stage in a case).
Unit Hierarchy	Access that is based on a person's position within a unit.
View	Access that allows one to see, inquire, or look up data.

For additional security definitions not included in this Job Aid,
refer to the CONNECTIONS Security Step-by-Step Guide
(available on the OCFS CONNECTIONS Intranet site).

New Business Functions

Build 17 adds several new Business Functions:

- VIEW ORG HIER
(View Organizational Hierarchy)
Provides view-only access to the Organizational Hierarchy window.

- MAINT ORG HIER
(Maintain Organizational Hierarchy)
Provides maintain access to the Organizational Hierarchy window.

- VIEW AGY ACC
(View Agency Access)
Provides view-only access to the Agency Access window.

- MAINT AGY ACC
(Maintain Agency Access)
Provides maintain access to the Agency Access window.

The Security Coordinator in each district/agency will be able to assign the VIEW AGY ACC and/or VIEW ORG HIER Business Functions to workers within that district/agency.

Locally designated workers who need to modify or maintain the *Agency Access* or *Organizational Hierarchy* window can only be given the MAINT AGY ACC and/or MAINT ORG HIER Business Functions by state staff. Prior to the implementation of Build 17, each district/agency will need to specify which individual(s) should receive these Business Functions.

Changes to the CONNECTIONS Toolbar

Build 17 will add new commands to the **Options** and **Maintain** menus on the CONNECTIONS Toolbar, in order to provide access to the new organizational hierarchy and agency access functionalities.
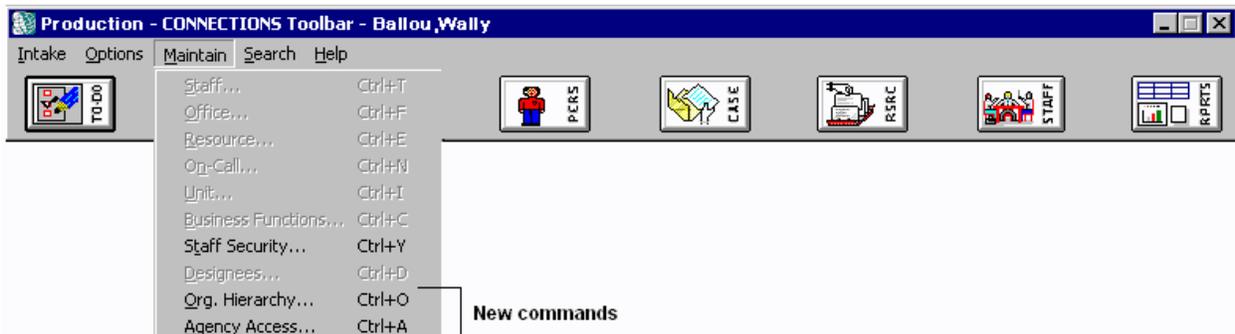
The following new commands will be added to the **Options** menu:

- View Org. Hierarchy
- View Agency Access
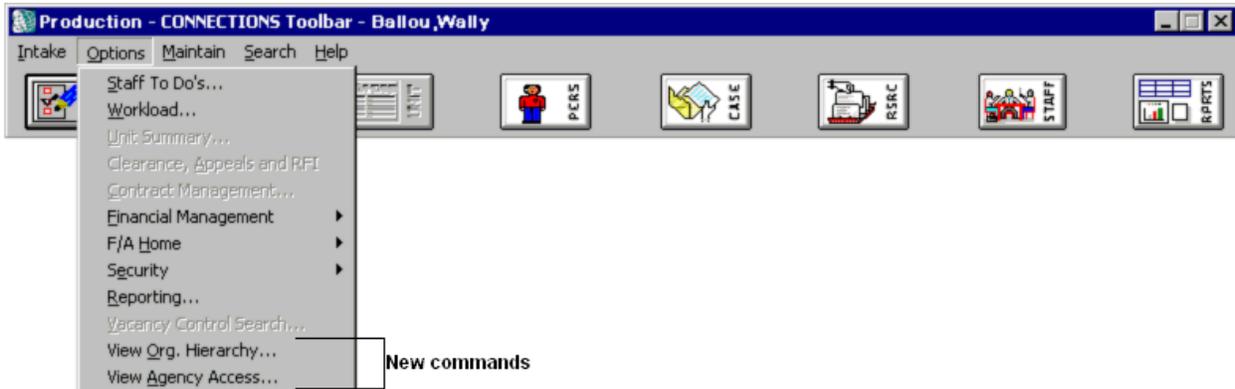
The following new commands will be added to the **Maintain** menu:

- Org. Hierarchy
- Agency Access

Changes to the Staff Security Window

Security Coordinators use the *Staff Security* window to set up or modify an employee's Job Type, Assignees and Business Functions. A Security Coordinator must have the MAINT SECURITY Business Function assigned in order to *modify* the window; the VIEW SECURITY Business Function must be assigned in order to *view* the window.

Build 17 adds four new elements to the *Staff Security* window:

- **Job Types** field
- **Selected Job Types Only** check box
- **Selected Business Functions Only** check box
- **Attributes** button

The existing CONNECTIONS security structure allows access to another worker's *Assigned Workload* based on unit hierarchy, rather than organizational hierarchy. Currently, a staff person who has a role in a unit as the Unit Approver (or has a role above the Unit Approver) who also has the UNIT SUM ACCESS Business Function can access (and update) all data for any case in that unit (subject to specialized access, such as sensitive cases). However, the roles currently available (Worker, Supervisor, Maintainer and Manager) do not correspond to the way most districts or agencies are organized, nor do they provide sufficient flexibility. In addition, Unit Summary Access security is not specific to a function, which can result in allowing an individual to have greater system access than may be necessary.

Three main factors currently determine a user's access to information in CONNECTIONS:

- Assignment of a Business Function Profile (BFP), which is composed of all Business Functions assigned to a particular worker
- Role in the case
- Role in the unit in conjunction with Unit Summary Access.

The pre-Build 17 structure currently in Production remains intact for all pre-Build 17 CONNECTIONS functionality. Build 17 introduces new functionality (e.g., Job Types, Organizational Hierarchy and Agency Access) to support structural changes coming to the CONNECTIONS system in future Builds.

Job Types

Build 17 adds new functionality with the assignment of Job Types. By assigning Job Types to the workers in a district/agency, the Security Coordinator can provide access that more closely mirrors the practical application of work in the field. A worker can be assigned one, several or no Job Types.

There are Job Types for each Office Type; these Job Types fall into two main categories: Clerical and Non-Clerical. (See Appendix A: Job Types on page 23 for a list of all Job Types and their corresponding categories.) Staff designated as Non-Clerical will have access to all units below their own, if this option is selected by their district/agency. If no Job Type is specified for a worker, the default Job Type is "Clerical."

Job Types should not be confused with Business Functions. While Security Coordinators use Job Types to determine Agency Access, Business Functions determine the access to windows available to a worker (i.e., which windows can be viewed/maintained for which stages). Assigning a Job Type to a worker does not affect that worker's BFP in any way.

For example, if caseworkers Jane Baker and Tom Cook are both assigned the Job Type of "Child Preventive Caseworker," each worker can access the Family Services Stages (FSS) on the other's *Assigned Workload*, if their agency has established that access on the *Agency Access* window. However, if Jane has the VIEW SENSITIVE Business Function in her BFP (but Tom does *not* have this Business Function in his BFP), Tom will not be able to see any sensitive stages on Jane's *Assigned Workload*.

A Security Coordinator's BFP must include the MAINT SECURITY Business Function in order to assign Job Types to workers.

Although the Build 17 security structure affects *only* Build 18 (and future) functionality, Security Coordinators will be able to use a single interface to administer both the pre-Build 17 and new security functionality. Security for pre-Build 17 functionality will continue to be administered as it is now.

When a Security Coordinator opens the *Staff Security* window for a particular worker, only the Job Types *available* for that worker's Office Type will display on the list in the **Job Types** field. To select a Job Type, simply double-click it; a check mark will display to the left of the Job Type to indicate that it has been selected. Multiple Job Types may be selected for an individual employee. To deselect a Job Type, double-click it again to remove its corresponding check mark. Remember, it is not required that a worker be assigned a Job Type.

Selected Job Types Only Check Box

The new **Selected Job Types Only** check box displays below the **Job Types** field. Click on this check box to display only the Job Types that have been selected for this worker, rather than having to scroll through the entire list of available Job Types. A check mark will display in the check box to indicate that it has been selected. To deselect this check box, click on it again; all available Job Types will display on the list.

Business Functions

In the **Business Functions** field, the list will display only the Business Functions *available* for that worker's Office Type. Double-click a Business Function to select it; a check mark will display to the left of the Business Function to indicate that it has been selected. Multiple Business Functions may be selected for an individual employee. To deselect a Business Function, double-click it again to remove its corresponding check mark.

Selected Business Functions Only Check Box

The new **Selected Business Functions Only** check box displays below the **Business Functions** field. Click on this check box to display only the Business Functions that have been selected for this worker, rather than having to scroll through the entire list of available Business Functions. A check mark will display in the check box to indicate that it has been selected. To deselect this check box, click on it again; all available Business Functions for that worker's Office Type will then display on the list.

Security for Returning Workers

Prior to Build 17, when a worker was end-dated and subsequently returned, the Business Functions and Case Assignability selected for that worker would remain intact with that worker's logon ID. With the implementation of Build 17, a worker's Business Functions, Case Assignability and Job Type(s) will be removed when s/he is end-dated. There should be a conscious decision on the part of the Security Coordinator regarding the Business Functions and Job Type(s) that should be assigned to the worker, as well as whether case assignability should be granted.

Attributes Button

Business Functions are comprised of one or more Security Attributes, which are created by state staff and assigned by local staff. To see the Security Attribute(s) contained in a particular Business Function, select the Business Function from the list and click on the **Attributes…** button to open the *Security Attributes* window.

System Edits on the Staff Security Window

The following rules apply when viewing the **Business Functions** field on the *Staff Security* window:

- The new VIEW ORG HIER and VIEW AGY ACC Business Functions will work the same as any other Business Function; therefore, they can be viewed and assigned by anyone with the MAINT SECURITY Business Function, or viewed by anyone with the VIEW SECURITY Business Function for anyone in that person's agency.

- Only OCFS CONNECTIONS staff can be assigned the ASSIGN ACC/HIER Business Function.

- Only OCFS CONNECTIONS staff who have the ASSIGN ACC/HIER Business Function can assign the MAINT ORG HIER or MAINT AGY ACC Business Functions.

- Only staff persons who have the MAINT ORG HIER Business Function *and* have access to the *Staff Security* window will see MAINT ORG HIER on the list of Business Functions for themselves and others who have been assigned that Business Function.

- Only staff persons who have the MAINT AGY ACC Business Function *and* have access to the *Staff Security* window will see MAINT AGY ACC on the list of Business Functions for themselves and others who have been assigned that Business Function.

	Step-by-Step: **Viewing Job Types and Business Functions for a Worker**

1 On the CONNECTIONS Toolbar, click on the **Options** menu and select **Security**.

2 Click on the **View Staff Security…** command.
The Staff Search Criteria window displays.

3 Enter the staff person's name or Person ID, then click on the **Search** button.
The Staff List displays with the search results.

4 Select the correct staff person from the *Staff List*, then click on the **OK** button.
The Staff Security window displays in view only mode.

5 Click the **Selected Job Types Only** check box.
*The **Job Types** field displays only the Job Types assigned to the worker.*

6 Click the **Selected Business Functions Only** check box.
*The **Business Functions** field displays only the Business Functions assigned to the worker.*

	Step-by-Step: **Modifying Job Types and Business Functions for a Worker**

1 On the CONNECTIONS Toolbar, click on the **Maintain** menu and select the **Staff Security…** command.
The Staff Search Criteria window displays.

2 Enter the staff person's name, then click on the **Search** button.
The Staff List displays with the search results.

3 Select the correct staff person from the *Staff List*, then click on the **OK** button.
The Staff Security window displays in modify mode.

4 Double-click the **Job Types** and/or **Business Functions** you need to add or delete.

5 Click on the **Save** button.

Organizational Hierarchy Window

Build 17 provides new functionality to enable local districts and voluntary agencies to establish an organizational hierarchy in CONNECTIONS that best represents their own organizational structure.

The *Organizational Hierarchy* window provides an organizational chart of a district/agency and its corresponding units. Workers with the proper security will have view and/or modify access to their own district/agency. Changing a unit's position within the organizational hierarchy of the district/agency can grant implicit security access rights to individuals at higher management levels. Anyone in a direct supervisory line above a worker with a role in the case can be given access to that case, if the district/agency chooses to authorize such access.

When the *Organizational Hierarchy* window is opened, CONNECTIONS automatically searches for and retrieves the following information to build the organizational hierarchy for the district/agency:

- Unit Number, Unit Specialization, In-/Out-Assignment data, Unit Approver and Supervisory Unit (from the *Unit Detail* window)

- Employee Name and Employee Role (from the *Staff Detail* window)

When the *Organizational Hierarchy* window is first opened after the implementation of Build 17, all units will display under the district/agency's root; the hierarchy will need to be created on this window.

In preparation for Build 17 implementation, current supervisory units will be deleted, in order that districts/agencies can make conscious decisions regarding how to organize their units. Currently, Supervisory Units are text-only fields that have no functionality.

The *Organizational Hierarchy* window will contain a tree-view list that will display the organizational hierarchy for the specified district/agency. This tree-view list has the look and feel of Windows Explorer, providing the worker with a familiar environment for maintaining the Organizational Hierarchy of the units within a district/agency. When this window is opened, the following information will be pre-filled by the system:

- User's **District/Agency**

- User's **Office Type**

- Tree-list displaying the district/agency and units in a hierarchical display

All units in a district/agency will be shown on the left side of the window. By default, units will display directly under the root (district/agency). Once a unit is moved, it will display where it has been inserted. Each unit will be listed under its supervisory unit. Each unit is displayed with a name that is composed of the Site ID, Unit number and Unit Specialization.

For example:
If a unit has a Unit Number labeled "VAB" and a Unit Specialization labeled "Administration" in site "1Q2," this unit will display as *(1Q2) VAB-Administration*.

The *Organizational Hierarchy* window contains two fields at the top of the window:

District/Agency	The code of the worker's own district/agency (e.g., "A15" for Essex County DSS, "A36" for Onondaga County).
Office Type	The district/agency's office type (e.g., "District" for LDSS offices, "Agency" for Voluntary Agencies).

Below these fields are two lists: the tree-view list on the left side of the window and the detail list on the right side.

The organizational hierarchy's tree-view list contains three components:

- The **root** is the district/agency itself.

- **Supervisory units** contain one or more units. Supervisory units are identified by a plus sign (+) to the left of its name in the tree-view list; when a worker clicks on the plus sign, the units under that supervisory unit will display under that supervisory unit on the *Organizational Hierarchy* window.

- **Units** are the minimum-level hierarchical components. They are often under supervisory units, but they can also exist directly under the root.

When a worker selects a unit, a detail list will display on the right side of the window, listing the names of the employees in that unit, each employee's In-/Out-Assignments and each employee's role within that unit. If an employee is the Unit Approver, this notation will display in parentheses following the employee's role. To make the list of employees easier to read, the list will display with alternately highlighted rows. Workers will only be able to view/modify the organizational hierarchy of their own district/agency.

Sample *Organizational Hierarchy* Window:

Blank area
(see "Drag & Drop" section on page 13)

	Step-by-Step:
	Accessing the Organizational Hierarchy Window in View-Only Mode

1   Click on the **Options** menu on the CONNECTIONS Toolbar.

2   Select the **View Org. Hierarchy** command.
The Organizational Hierarchy window opens in view-only mode.

	Step-by-Step:
	Accessing the Organizational Hierarchy Window in Modify Mode

1   Click on the **Maintain** menu on the CONNECTIONS Toolbar.

2   Select the **Org. Hierarchy** command.
The Organizational Hierarchy window opens in modify-mode.

New units may be added either automatically through WEBSTAR (see tip box below), or manually by using the **Unit** command in the **Maintain** menu on the CONNECTIONS Toolbar. New units will display under the district/agency root until they are moved under the appropriate supervisory unit. When the *Organizational Hierarchy* window is opened in modify mode, the window will allow the worker to modify the hierarchy of units within the district/agency by using the drag-and-drop feature. Supervisory units cannot be changed in the *Unit Detail* window.

What is WEBSTAR?

An agency's local LAN (Local Area Network) Administrator is given the ability to access and use WEBSTAR (Web Enhanced Basic Security to Authorize Resources) by the NYS Office for Technology (OFT) The local LAN Administrator uses WEBSTAR to request NT logon IDs for workers in that agency and to reset NT logon passwords when necessary.

While still in WEBSTAR, the local LAN Administrator can add a worker to CONNECTIONS using Administer Application Access (or the worker can be added to CONNECTIONS later).

A batch update run between WEBSTAR and CONNECTIONS occurs nightly; the worker will have been added to CONNECTIONS the next day.

When a new staff person is added through WEBSTAR, the information is sent to the nightly batch job. When the batch is run, it looks to see if the designated site contains a unit beginning with "N." If there is, the system will attempt to add the person to the highest numbered "N" unit. An N unit can hold a maximum of 50 workers. If the highest numbered N unit already contains 50 workers, a new N unit is created using the next highest number. (If N12 is full, for example, N13 will be created.)

When a new default unit is created, it is automatically populated with a generic conversion worker who serves as the Unit Approver; thus each "N" unit can really only accept 49 new workers.

As the Security Coordinator moves new workers from their default units to their In-Assigned units, this leave N units with only conversion workers in them. In an agency where are large number of new workers are added, if these units are not cleared out (by deleting the conversion worker and then deleting the unit), CONNECTIONS will eventually be forced to create multiple N00 units.

To avoid the creation of duplicate N units, the Security Coordinator should delete the conversion workers from N units that contain no other workers, then delete those units.

Drag-and-Drop Feature
Workers with the MAINT ORG HIER Business Function will be able to modify the hierarchy of the units within their district/agency by using a drag-and-drop feature. Click the *right* mouse button to initiate this feature. Simply highlight a unit within the agency/district, then drag and drop it under a supervisory unit, thereby modifying its organizational position within the district/agency. Each time a drag-and-drop action is performed, the following message will display:

> *"Are you sure you want to make this change to the Organizational Hierarchy?"*

- Clicking on the **Yes** button saves the change.

- Clicking on the **No** button cancels the change.

The message box also allows the worker to turn off the confirmation message by selecting the **Do not prompt again in this window session** check box at the bottom of the message box. When the *Organizational Hierarchy* window is closed, the session is ended. The next time the window is opened in modify mode, a new session begins and the confirmation message will display after each drag-and-drop action is performed. Changes will be saved when the worker clicks on the **Yes** button in response to the confirmation message; if the worker turns off the confirmation message for that session, the changes will be saved immediately as they are made.

If a worker attempts to drag and drop a unit onto itself, or drag and drop a supervisory unit under a subordinate unit, no change will display on the tree-view list. If a unit is listed several pages below in the tree-view list and the worker needs to drag and drop it to the root unit, s/he can drag a unit and drop it on any blank area within the tree-view list. (See the screen graphic on page 11.) This feature eliminates the need to drag a unit and scroll several pages to reach the top of the tree-view list.

System edits will be in place to prevent two workers from modifying the Organizational Hierarchy for the same district/agency at the same time. For example, if Worker A moves the Adoptive unit from the Foster Care unit to the Preventive Services unit, Worker B will be prevented from moving the Adoptive unit to any other unit. Worker B will also be prevented from moving any other units into the Preventive Services unit. If Worker B attempts to do so, the following message will display:

> *"Save Failed: Data has been modified by another user. Exit and try again."*

A system edit that currently prevents workers from creating duplicate units within an agency site will remain in place after the implementation of Build 17.

Unit Detail Window

The *Unit Detail* window is used to create new units within an agency/district. Build 17 will change the **Supervisory Unit** field on this window to a protected field. The information in this field can only be modified via the *Organizational Hierarchy* window.

Prior to Build 17, supervisory unit information that was recorded in CONNECTIONS was not captured by the system for use in other windows. The **Supervisory Unit** field on the *Unit Detail* window will display the supervisory unit information recorded on the *Organizational Hierarchy* window.

To open the *Unit Detail* window in modify mode, click on the **Maintain** menu on the CONNECTIONS Toolbar and select the **Unit** command.
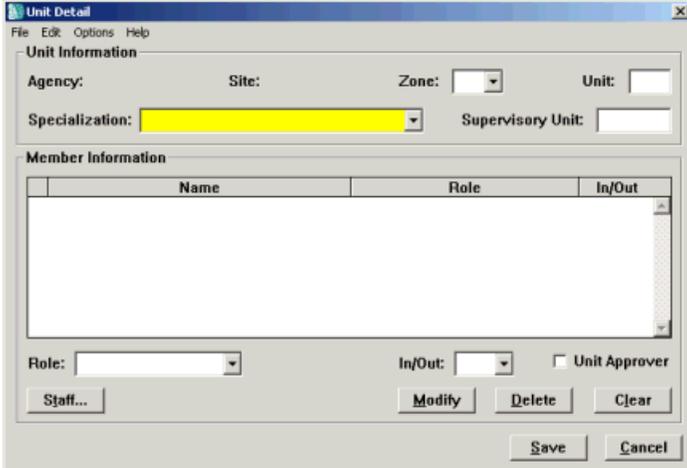
When the window is opened, both the **Unit** field and the **Supervisory Unit** field will be pre-populated after Organizational Hierarchy has been created. (When Build 17 is first implemented, the **Supervisory Unit** field will be empty.) The **Supervisory Unit** field will be protected to prevent modifications to Supervisory Unit data. The *Organizational Hierarchy* window uses the information in these fields to display the organizational hierarchy. All modifications to the Supervisory Unit must be done through the *Organizational Hierarchy* window.

A unit can only be deleted if it has no subordinate units.

If you attempt to delete a unit that is a Supervisory Unit to one or more other units, the **Delete** command will not enable in the **File** menu on the *Unit Detail* window.

To delete the Supervisory Unit, you must first move all of its subordinate units to other units on the *Organizational Hierarchy* window. (See page 10.) Only then will the **Delete** command enable.

Agency Access Window

Build 17 enables Security Coordinators to provide access privileges to workers within their own districts/agencies, aside from the assignment of Business Functions. Security Coordinators will use the new *Agency Access* window to create and maintain access privileges for their own districts/agencies. Agency staff can be granted view privileges, maintain privileges or no privileges for each staff grouping (Case Assignable Staff, Unit Approver, Direct Supervisory Line).

Initially, Agency Access will need to be created for each district/agency. If the *Agency Access* window is opened in either view-only or modify mode *before* Agency Access has been recorded and saved in CONNECTIONS, the default access for all staff groupings will be **None** and the following message will display:

"Agency Access Information has not yet been entered."

Once the Security Coordinator has established Agency Access, the most current data will be retrieved each time the *Agency Access* window is opened.

In order to view the *Agency Access* window, a worker's BFP must include the VIEW AGY ACC Business Function. To maintain this window, the worker's BFP must include the MAINT AGY ACC Business Function.

The *Agency Access* window works in conjunction with the *Organizational Hierarchy* window. The organizational hierarchy of each district/agency is viewed and maintained in the *Organizational Hierarchy* window.

The **District/Agency** field at the top of the window will automatically populate with the worker's own district/agency code. For example, if the worker has an Agency ID of A01, then "A01" will display in the **District/Agency** field.

The main body of the *Agency Access* window is divided into three sections:

Case Assignable Staff This section will work in conjunction with the **Case Assignable** check box on the *Staff Detail* window, the unit to which the worker is assigned, and the worker's Job Type.

Three staff groupings will be included in this section:

- **All Within District** will provide access to all cases in the district/agency.

- **All Within Unit** will provide access to all cases in the same unit.

- **All Within Same Job Type** will provide access to all cases that are of the same Job Type as the staff person.

Unit Approver This section will be used only for staff with Unit Approver status in the district/agency, whether in- or out-assigned.

Two staff groupings will be included in this section:

- **All Within District** will provide access to all cases in the district/agency for all Unit Approvers.

- **All Within Same Unit Spec** will provide access to all cases within the same unit specialization for all Unit Approvers.

Direct Supervisory Line This section will work in conjunction with the *Organizational Hierarchy* window.

Two staff groupings will be included in this section:

- **All Staff** will provide access to all cases within a direct supervisory line for all staff, regardless of Job Type.

- **All Non-Clerical Staff** will provide access to all cases within a direct supervisory line for all staff with a Non-Clerical Job Type. (See Appendix A: Job Types on page 23 for a list of Job Types.)

Direct Supervisory Line
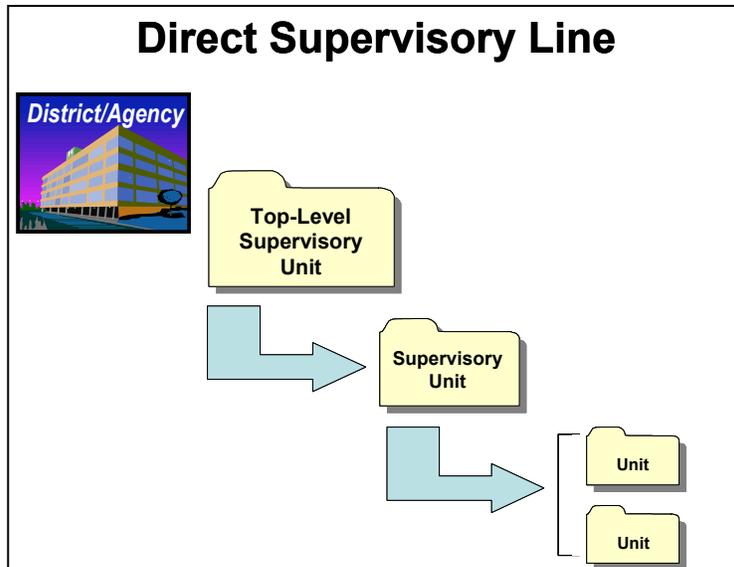
The Security Coordinator can assign **View** access, **Maintain** access, or **None** by clicking on the corresponding radio button for each staff grouping within each section, as appropriate.

Two buttons will display at the bottom of the *Agency Access* window:

Save	This button will save the information and close the *Agency Access* window. This button will be enabled only if unsaved changes have been made to the window. Clicking on the **Save** button will display the following message:

"Changes have been saved."

Clicking on the **OK** button in response to this message will close the *Agency Access* window.

Cancel	This button discards any unsaved information and closes the *Agency Access* window.

If the window was opened in view-only mode, clicking on this button will close the window. If the window was opened in modify mode and unsaved changes have been made to the window, clicking on the **Cancel** button will display the following message:

"Do you want to exit?
Unsaved data and/or narrative(s) will be lost."

- Clicking on the **Yes** button in response to this message will discard any unsaved information and close the *Agency Access* window.

- Clicking on the **No** button will leave the window open without discarding unsaved information.

	Step-by-Step:
	Accessing the Agency Access Window in View-Only Mode

1 Click on the **Options** menu on the CONNECTIONS Toolbar.

2 Click on the **View Agency Access** command.
The Agency Access window displays in view-only mode.

	Step-by-Step:
	Maintaining Agency Access

1 Click on the **Maintain** menu on the CONNECTIONS Toolbar.

2 Click on the **Maintain Agency Access** command.
The Agency Access window displays in modify mode. If agency access has not yet been established, the following message will display:
"Agency Access information has not yet been entered."

3 Click on the **OK** button in response to the message.
The default setting for all staff groupings on the Agency Access window will be None.

4 To change the agency access setting for a specific staff grouping, click on its corresponding **View**, **Maintain** or **None** radio button, as appropriate.

If two workers access the *Agency Access* window in modify mode for the same district/agency at the same time, only the first worker who saves changes will be allowed to do so. If the second worker attempts to save changes after the first worker has done so, the following message will display:

"Save Failed: Data has been modified by another user. Exit and try again."

Clicking on the **OK** button will close the message box.

The default agency access will be established based on the business rules, which are reflected in the Agency Access Options Matrix on the next page.

The following conditions apply to the *Agency Access* window:

- For each of the options, only one of **View**, **Maintain** or **None** may be selected.

- There are no system edits necessary among the choices for the three sets of options, because each one encompasses a different set of staff.

- If the district/agency has not yet opened the *Agency Access* window in modify mode and saved the information, the default will be **None** for all choices.

- The access granted via the *Agency Access* window will *not* remove access granted in other ways. The options on this window will only *add* access to that which is granted in other ways, they will never remove access.

Agency Access Options Matrix
(**E** = Option Enabled   **D** = Option Disabled)
(Highlighted items indicated what is selected or enabled.)

Case Assignable Staff

	View	Maintain	None
All Within District/Agency	Selected		
All Within Unit	D	E	D
All Within Same Job Type	D	E	D

When **View** is selected for the All Within District/Agency staff grouping, only the **Maintain** radio button will be enabled for the All Within Unit and All Within Same Job Type staff groupings. If no radio button is selected for either of these staff groupings, the default access will be **View**, since that was selected for all workers within that district/agency.

	View	Maintain	None
All Within District/Agency		Selected	
All Within Unit	D	D	D
All Within Same Job Type	D	D	D

When **Maintain** is selected for the All Within District staff grouping, *all* radio buttons will be disabled for the All Within Unit and All Within Same Job Type staff groupings, since the broadest level of agency access has already been established for all workers within that district/agency.

	View	Maintain	None
All Within District			Selected
All Within Unit	E	E	E
All Within Same Job Type	E	E	E

When **None** is selected for the All Within District staff grouping, *all* radio buttons will be enabled for the All Within Unit and All Within Same Job Type staff groupings. If no radio button is selected for either of these staff groupings, the default access will be **None**, since that was selected for all workers within that district/agency.

Unit Approver

	View	Maintain	None
All Within District	Selected		
All Within Same Unit Spec.	D	E	D

When **View** is selected for the All Within District staff grouping, only the **Maintain** radio button will be enabled for the All Within Same Unit Spec staff grouping. If no radio button is selected for this staff grouping, the default access will be **View**, since that was selected for all workers within that district/agency.

	View	Maintain	None
All Within District		Selected	
All Within Same Unit Spec.	D	D	D

When **Maintain** is selected for the All Within District staff grouping, *all* radio buttons will be disabled for the All Within Same Unit Spec staff grouping, since the broadest level of agency access has already been established for all workers within that district/agency.

	View	Maintain	None
All Within District			Selected
All Within Same Unit Spec.	E	E	E

When **None** is selected for the All Within District staff grouping, *all* radio buttons will be enabled for the All Within Same Unit Spec staff grouping. If no radio button is selected this staff grouping, the default access will be **None**, since that was selected for all workers within that district/agency.

Direct Supervisory Line

	View	Maintain	None
All Staff	Selected		
All Non-Clerical Staff	D	E	D

When **View** is selected for the All Staff grouping, only the **Maintain** radio button will be enabled for the All Non-Clerical Staff grouping. If no radio button is selected for this staff grouping, the default access will be **View**, since that was selected for all workers within that district/agency.

	View	Maintain	None
All Staff		Selected	
All Non-Clerical Staff	D	D	D

When **Maintain** is selected for the All Staff grouping, *all* radio buttons will be disabled for the All Non-Clerical Staff grouping, since the broadest level of agency access has already been established for all workers within that district/agency.

	View	Maintain	None
All Staff			Selected
All Non-Clerical Staff	E	E	E

When **None** is selected for the All Staff grouping, *all* radio buttons will be enabled for the All Non-Clerical Staff grouping. If no radio button is selected this staff grouping, the default access will be **None**, since that was selected for all workers within that district/agency.

Additional Security Enhancements

Prior to the implementation of Build 17, when workers were end-dated in CONNECTIONS, the Business Functions assigned to them would remain associated with their ID numbers. When workers were re-activated at a later date, they would automatically receive the Business Functions assigned to them when they were end-dated. With the implementation of Build 17, all Business Functions and Case Assignability will be removed from workers when they are end-dated in the system. If a worker returns, the Security Coordinator should make a conscious decision regarding the Business Functions the worker should be given, as well as determining if Case Assignability should be granted.

These additional security enhancements affect all CONNECTIONS users.

Updates to Online Help

Online Help will be updated to reflect enhancements made to the CONNECTIONS system in Build 17.

Appendix A: Job Types

State Job Types	
Clerical	*Non-Clerical*
Administrative Staff Commissioner's Staff Legal Support Staff SCR 6 & 9 SCR Support Staff	Administrator Adoption Services Assoc. Commissioner Attorney Auditor Budget Manager Clerical Support Commissioner Deputy Commissioner Fiscal Staff Interstate Compact Staff Program Director Program Staff Quality Control Rate Setting SCR Admin Review SCR CPS 1 SCR CPS 2 SCR CPS 3 State Adoption Services Technical Support Staff

Regional Office Job Types	
Clerical	*Non-Clerical*
Administrative Support	Adoption Specialist BECS Licensing Staff BECS Licensing Supervisor BECS Regional Director Connections Implementation County Lead County Lead Supervisor IAB Investigator IAB Supervisor Regional Office Director VA Lead VA Lead Supervisor

LDSS Job Types	
Clerical	*Non-Clerical*
Accounting Clerk Clerical Staff Commissioner's Staff Legal/Court Support Staff Support Staff	Accounting Supervisor Administrative Staff Adoption Caseworker Adoption Director Adoption Supervisor Assistant Commissioner Attorney Auditor Caseworker Child Protective Caseworker Child Protective Director Child Protective Supervisor Commissioner Contract Manager Director of Services Fiscal Staff Foster Care Caseworker Foster Care Director Foster Care Supervisor Home Finder Home Finding Supervisor Interstate Compact Preventive Caseworker Preventive Services Director Preventive Supervisor Quality Control Staff Senior Caseworker Senior Welfare Examiner Social Worker/Clinician Staff Development Welfare Examiner

Voluntary Agency Job Types	
Clerical	*Non-Clerical*
Accounting Clerk Clerical Staff Legal/Court Support Staff Support Staff	Accounting Supervisor Administrative Staff Adoption Caseworker Adoption Director Adoption Supervisor Asst. Executive Director Attorney Auditor Bureau Director/Head Case/Program Aide Caseworker Executive Director Executive Director's Staff Fiscal Staff Foster Care Director Foster Care Caseworker Foster Care Supervisor Home Finder Home Finding Supervisor Preventive Caseworker Preventive Services Director Preventive Services Supervisor Program Director Quality Control Staff Senior Caseworker Social Worker/Clinician Staff Development Supervisor Youth Counselor

OMH Job Types	
Clerical	*Non-Clerical*
Account Clerk Administrative Support Staff Clerical Staff Staff Development Support Staff	Commissioner's Office Contract Manager CPS Investigator CPS Supervisor Director Fiscal Staff Foster Care Services Home Finder Interstate Compact Legal Quality Control Senior Youth Counselor Social Worker/Clinician Youth Counselor

OMRDD Job Types	
Clerical	*Non-Clerical*
Account Clerk Administrative Support Staff Clerical Staff Staff Development	Commissioner's Office Contract Manager CPS Investigator CPS Supervisor Director Foster Care Services Home Finder Interstate Compact Legal Quality Control Senior Youth Counselor Social Worker/Clinician Youth Counselor

CQC Job Types	
Clerical	*Non-Clerical*
Administrative Support Staff	Commissioner's Office Director IAB Investigator IAB Supervisor Quality Control

DFY Job Types	
Clerical	*Non-Clerical*
Account Clerk Administrative Support Staff Clerical Staff Support Staff	Contract Manager CPS Investigator CPS Supervisor Facility Director Fiscal Staff Foster Care Services Home Finder Interstate Compact Legal Quality Control Senior Youth Counselor Social Worker/Clinician Staff Development Youth Counselor