



PERSONALIZING CONNECTIONS

~ QUICK STEPS ~

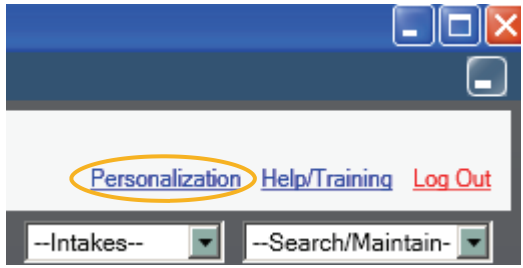
CUSTOMIZING YOUR WORKLOAD SETTINGS

Common features in CONNECTIONS and the **Personalization** link provide a way for you to complete certain tasks:

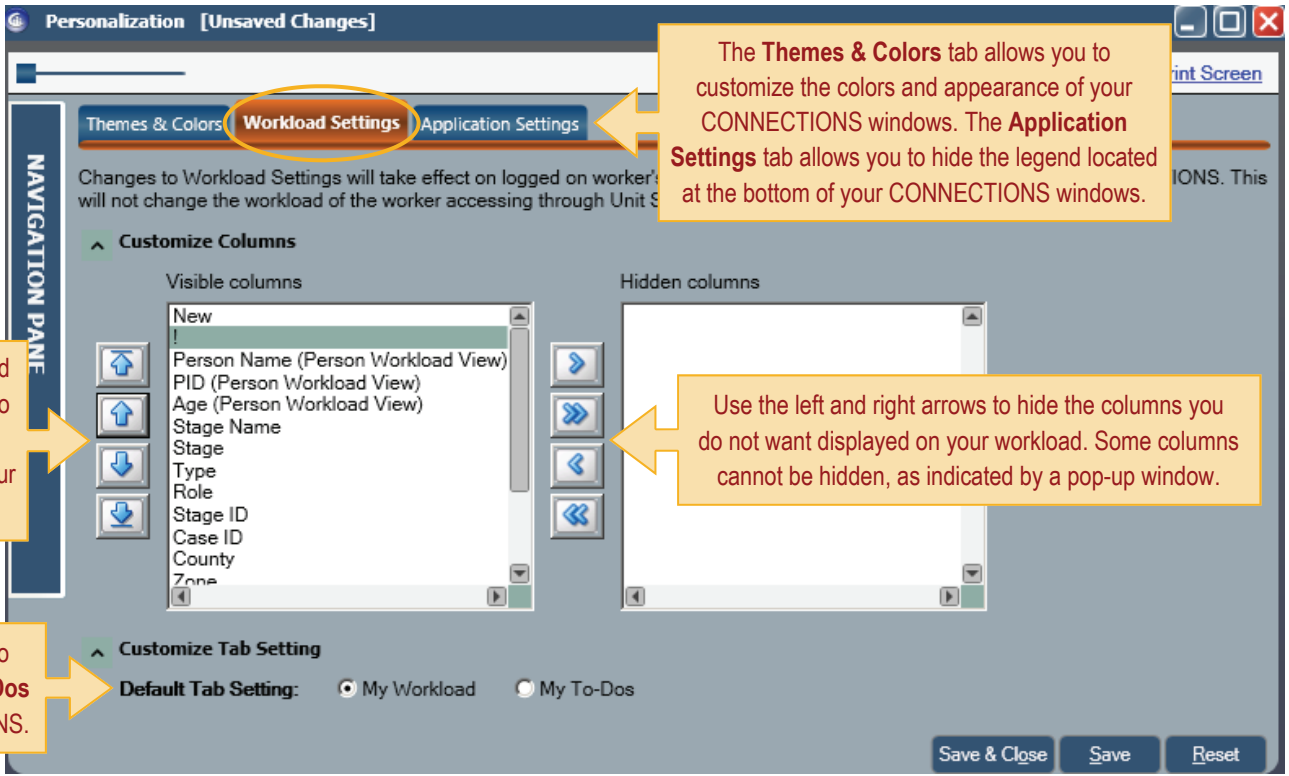
- Customize your workload settings.
- Change your workload view.
- Modify your workspace.
- Minimize scrolling and filter your search results.

Changes made via the **Personalization** link remain in effect until you modify them and apply only to your own workload.

1 Click the **Personalization** link to display the *Personalization* window.



2 Click the **Workload Settings** tab to customize your columns, then click **Save & Close**.



Use the up and down arrows to re-order the columns on your workload.

The **Themes & Colors** tab allows you to customize the colors and appearance of your CONNECTIONS windows. The **Application Settings** tab allows you to hide the legend located at the bottom of your CONNECTIONS windows.

Use the left and right arrows to hide the columns you do not want displayed on your workload. Some columns cannot be hidden, as indicated by a pop-up window.

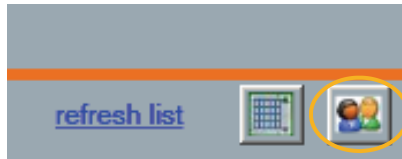
The **Default Tab Setting** field allows you to select whether the **My Workload** or **My To-Dos** tab displays upon logging into CONNECTIONS.

This material was developed by the Professional Development Program, Rockefeller College, University at Albany, through The Research Foundation for SUNY, under a training and administrative services agreement with the New York State Office of Children and Family Services.

CHANGING YOUR WORKLOAD VIEW

1

Click the **Person Workload View** icon to change from Grid view to Person Workload view.



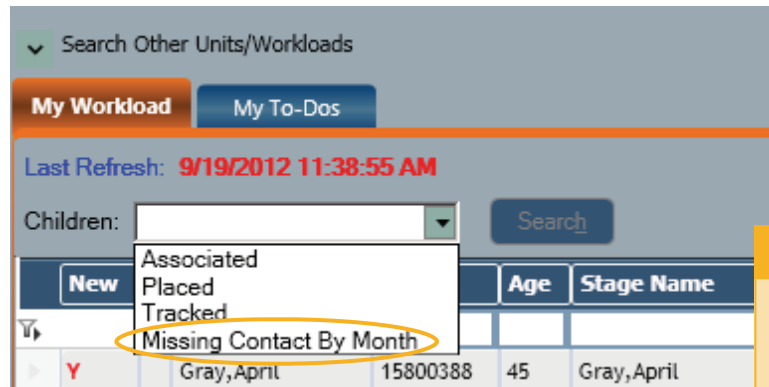
The Grid view is the default view of the **My Workload** tab and displays all of the stages on your workload.



The Person Workload view of the **My Workload** tab displays all persons on your workload and may be filtered using the drop-down menu in the **Children** field.

2

Click the **Children** drop-down field and select a search option, then click **Search**.



DID YOU KNOW?

The **Missing Contact by Month** search identifies children with missing casework contacts.

Your search results are filtered and display in the grid.

New	Person Name	PID	Age	Stage Name	Stage	Type	Role	Stage ID
	Brown,Nathan	18500420	15	Brown,Sherry	FSS	CWS	CP	28500187
	Brown,Derek	18500421	11	Brown,Sherry	FSS	CWS	CP	28500187
	Brown,Cindy	18500422	8	Brown,Sherry	FSS	CWS	CP	28500187
	Collins,Patrick	17200470	14	Collins,Kristy	FSS	CWS	CP	27200279
	Collins,Kimberly	17200471	10	Collins,Kristy	FSS	CWS	CP	27200279
	Collins,Tyler	17200472	3	Collins,Kristy	FSS	CWS	CP	27200279
	Gilbert,Sam	17500202	3	Gilbert,Sam	FSS	CCR	CP	27500205

CUSTOMIZING YOUR WORK SPACE

PIN ICON: Click the **pin** icon to un-pin and hide the **NAVIGATION PANE**. This maximizes your work space, providing an expanded view of the window. To un-hide the **NAVIGATION PANE**, hover over it and click the pin icon.

SLIDER TOOL: Click and slide the **slider** control to zoom in and out of the window.

COLLAPSE/EXPAND ARROWS: Click the **collapse/expand** arrows to collapse an open section of the window or **NAVIGATION PANE**. Click again to re-open the section.

GRID SEPARATOR: Click and slide the **grid separator** up or down to increase or decrease the size of a section on the window.

FILTER ROW: Filter your results by typing in the empty row below the appropriate column header(s).

SORT TOOL: Sort the records in a grid by clicking the desired column header (the sort category).

SCROLLBAR: Click and slide the **scrollbar** up or down to scroll through the records in a grid.

PIN ICON

SLIDER TOOL

COLLAPSE/EXPAND ARROWS

GRID SEPARATOR

SORT TOOL

FILTER ROW

SCROLLBAR

DID YOU KNOW?
You can reposition a column by clicking the column header and dragging it to the desired location.



Name	Primary	Secondary	Case Mgr	Case Plnr	Case Wkr	CPS W/M	Total Cases
Wilson, Darryl	24	1		8			24

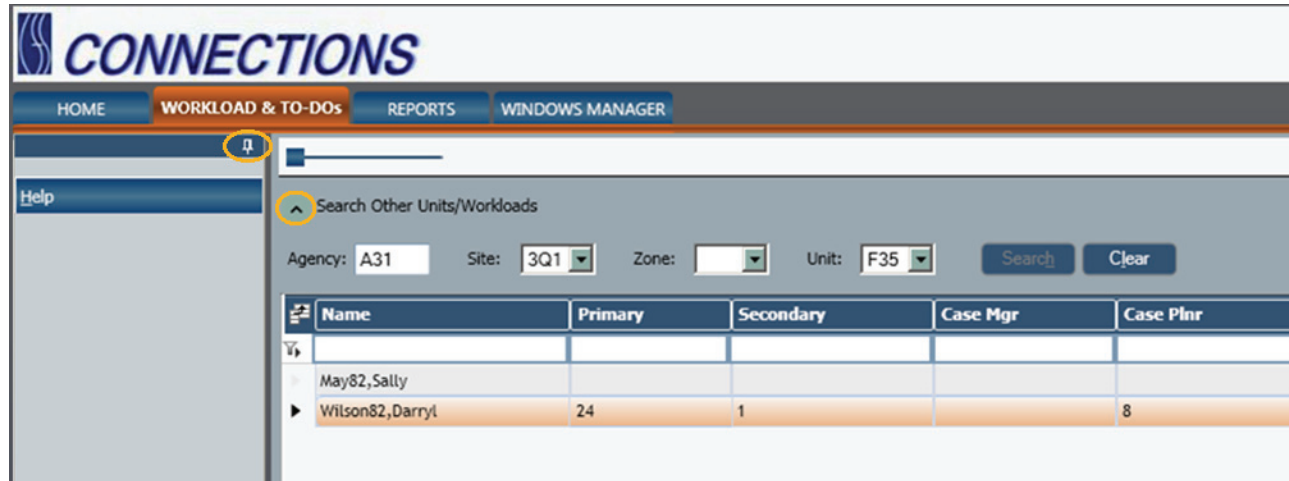
Stage Name	Stage	Type	Role	Stage ID	Case ID	County	Zone	Agency	Start Date	Assigned	Unit
Adams, Maggie	FSS	CWS	CP	24600150	34600085	031		A31	04/24/2009	04/24/2009	E63
Antonio, Maria	INV	INI	PR	20100269	30100134	031			03/13/2003	03/13/2003	F64
Antonio, Maria	INV	SUB	PR	20100271	30100134	031			03/14/2003	03/14/2003	F64
Brown, Sherry	FSS	CWS	CP	28500187	38500103	031		A31	09/14/2009	09/14/2009	E63
Clarke, Stephani	FSS	CWS	CP	28000673	38000581	031		A31	01/27/2009	01/27/2009	E63
Collins, Kristy	FSS	CWS	CP	27200279	37200084	031		A31	04/24/2009	04/24/2009	E62
Collins, Kristy	INV	INI	PR	27200277	37200084	031			04/24/2009	04/24/2009	E62
Connors, Sandra	INV	INI	PR	20500271	30500135	031			02/18/2003	02/18/2003	F64
Gilbert, Martha	FSS	CWS	CP	27500204	37500081	031		A31	09/10/2009	09/10/2009	E63
Gilbert, Sam	FSS	CCR	CP	27500205	37500082	031		A31	09/10/2009	09/10/2009	E63
Gray, April	INV	SUB	SE	25800259	35800128	031			03/03/2009	03/06/2010	F22
Gray, April	INV	INI	PR	25800253	35800126	031			03/03/2009	03/03/2009	E62
Gray, April	INV	SUB	PR	25800255	35800126	031			03/03/2009	03/03/2009	E62
Green, Kelly	INV	INI	PR	27700099	37700059	031			09/22/2009	09/22/2009	E63

DID YOU KNOW?
Customizations made to your work space using the tools described on this page are temporary, unlike those made via the **Personalization** link. When you log off CONNECTIONS and then log back on, they will no longer display.

CUSTOMIZING YOUR WORK SPACE (CONTINUED)

1

Click the  icon on the **NAVIGATION PANE** and the  (collapse) arrow.



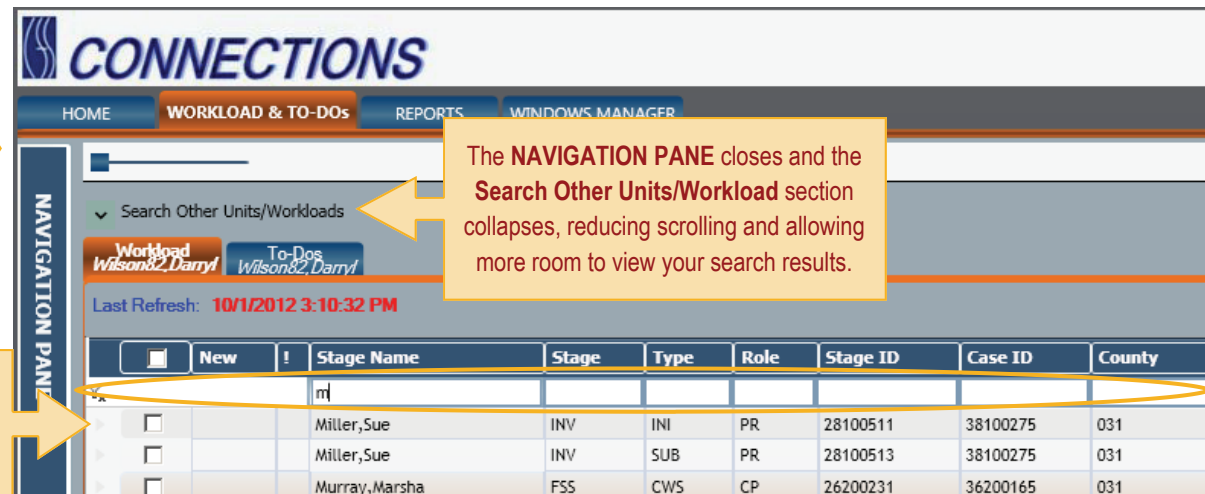
The screenshot shows the CONNECTIONS interface with the 'WORKLOAD & TO-DOs' tab selected. The navigation pane on the left is partially collapsed. A search section titled 'Search Other Units/Workloads' is visible, with filters for Agency (A31), Site (3Q1), Zone, and Unit (F35). Below the search section is a table with columns: Name, Primary, Secondary, Case Mgr, and Case Plnr.

Name	Primary	Secondary	Case Mgr	Case Plnr
May82,Sally				
Wilson82,Darryl	24	1		8

2

Type a letter or number in the blank **filter row** below the desired column header.

Your search results are filtered and display in the grid.



The screenshot shows the CONNECTIONS interface with the 'WORKLOAD & TO-DOs' tab selected. The navigation pane is now fully collapsed. The search section is also collapsed. Below the search section is a table with columns: New, Stage Name, Stage, Type, Role, Stage ID, Case ID, and County. The search results are filtered to show records with 'm' in the Stage Name column.

New	Stage Name	Stage	Type	Role	Stage ID	Case ID	County
<input type="checkbox"/>	m						
<input type="checkbox"/>	Miller,Sue	INV	INI	PR	28100511	38100275	031
<input type="checkbox"/>	Miller,Sue	INV	SUB	PR	28100513	38100275	031
<input type="checkbox"/>	Murray,Marsha	FSS	CWS	CP	26200231	36200165	031

The **NAVIGATION PANE** closes and the **Search Other Units/Workload** section collapses, reducing scrolling and allowing more room to view your search results.