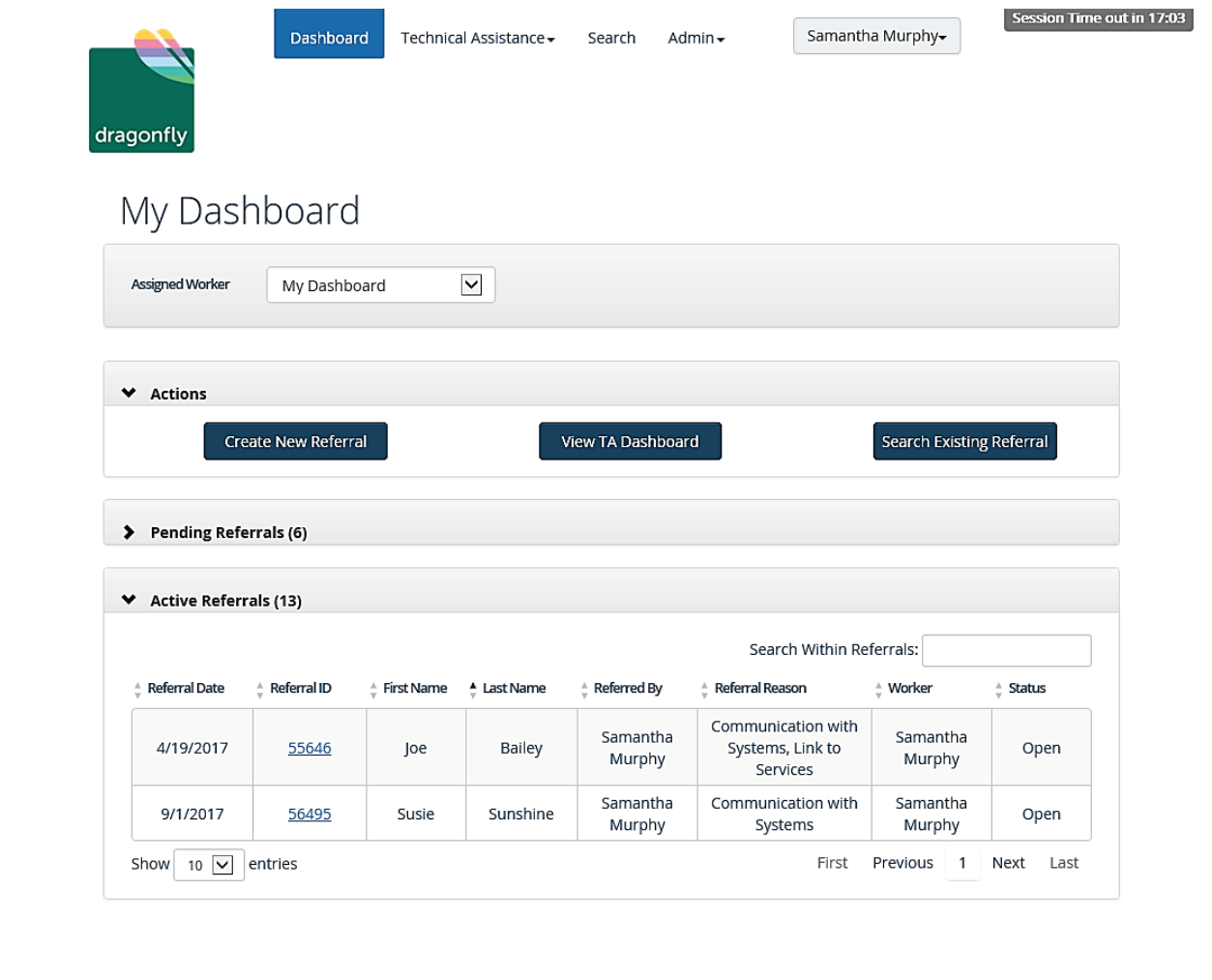




My Dashboard – Dragonfly Job Aid

The *My Dashboard* screen is the first screen that appears after logging into the application. This screen allows workers to view and access Referrals as well as navigate to other areas of the application including Technical Assistance.

My Dashboard



The screenshot shows the 'My Dashboard' interface. At the top, there is a navigation bar with a 'Dashboard' button, 'Technical Assistance' dropdown, 'Search', 'Admin' dropdown, a user profile for 'Samantha Murphy', and a session timer 'Session Time out in 17:03'. Below the navigation bar is the 'My Dashboard' title and a section for 'Assigned Worker' with a dropdown menu set to 'My Dashboard'. The main content area is divided into two sections: 'Actions' and 'Pending Referrals (6)'. The 'Actions' section contains three buttons: 'Create New Referral', 'View TA Dashboard', and 'Search Existing Referral'. The 'Pending Referrals (6)' section is followed by a section for 'Active Referrals (13)'. This section includes a search bar 'Search Within Referrals:' and a table of active referrals. The table has columns for Referral Date, Referral ID, First Name, Last Name, Referred By, Referral Reason, Worker, and Status. Two referrals are listed: one from 4/19/2017 for Joe Bailey, referred by Samantha Murphy, with a status of 'Open', and another from 9/1/2017 for Susie Sunshine, referred by Samantha Murphy, with a status of 'Open'. Below the table, there is a 'Show 10 entries' dropdown and pagination links: 'First', 'Previous', '1', 'Next', and 'Last'.

Referral Date	Referral ID	First Name	Last Name	Referred By	Referral Reason	Worker	Status
4/19/2017	55646	Joe	Bailey	Samantha Murphy	Communication with Systems, Link to Services	Samantha Murphy	Open
9/1/2017	56495	Susie	Sunshine	Samantha Murphy	Communication with Systems	Samantha Murphy	Open

Accessing My Dashboard

1. The **Dashboard** button can be found at the top of every screen.

Clicking on the **Dashboard** button or the application logo [] at the top of any screen will also navigate the user to the Dashboard.

Basic Dashboard Elements

▼ Active Referrals (1)

Sort Indicator Hyperlink Search Within Referrals: **Search**

Referral Date	Referral ID	First Name	Last Name	Referred By	Referral Reason	Worker	Status
3/1/2017	55355	SUSIE	SUNSHINE	Samantha Murphy	Other	Samantha Murphy	Open

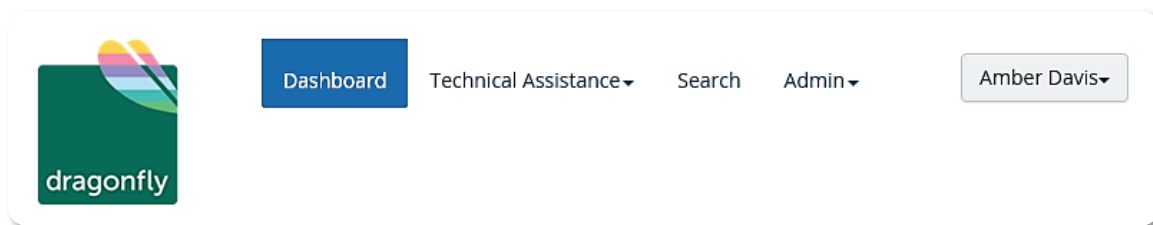
Show 10 entries First Previous 1 Next Last

Headers **Pagination**

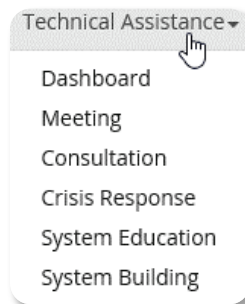
- **Headers:** Identify what type of information can be found in the grid columns.
- **Sort Indicator:** [▲] This indicates what direction the Header in the grid is sorted in to. To sort the list on a specific Header, click on the desired *Header*. The sort indicator will point upward [▲] for ascending order or downward [▼] for descending order.
- **Hyperlinks:** Hyperlinks within the grid will open the item in the grid. Clicking on [55355](#) will open Referral# 55355.
- **Pagination:** Longer lists will be separated into pages. These pages can be navigated by using the **First Previous 1234 Next Last** links to the bottom-right of the grid. To the bottom-left of the grid is a drop-down option, **Show 10 entries**, that allows users to change the number of grid entries displayed per page.
- **Search Within...** : These search fields can filter the grid down to any grid item containing all or part of a word, date, or number.
 - The filter will only apply to text and numbers that are contained within the grid itself. For example: Typing "Other" will filter the list to all Referrals with a Referral Reason of *Other*.
 - This search also accepts partial entries. For example, typing "55" will filter this list to include any Referrals with 55 in the Referral Number. Typing "Sus" will bring up all Referrals where the name starts with *Sus*, for example, Susie Sunshine.
 - To clear the search results, click the **X** that appears to the right inside the search field or delete the search terms.

My Dashboard

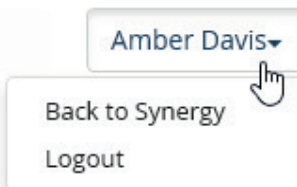
1. After selecting the Dragonfly tile [] on the Synergy splash screen, the user will be taken directly to the **Dashboard**. All of the Referral panes on this screen default to being closed. Use the chevrons [] to open and close the panes. The title of each pane also contains the number of items in that pane in parenthesis, for example:  **Active Referrals (5)**.
2. *Static Navigation Buttons*: These navigation buttons will always be at the top of the screen and can be accessed from any screen in Synergy. Depending on the user's level of access there may be more or less options available. All users will have ***Dashboard***, ***Technical Assistance*** ▼ and ***Search***. Administrators will also have the ***Admin*** ▼ menu option as well.



3. *Technical Assistance* ▼ : Click on the down arrow [▼] to access the Technical Assistance menu and navigate to the various screens.

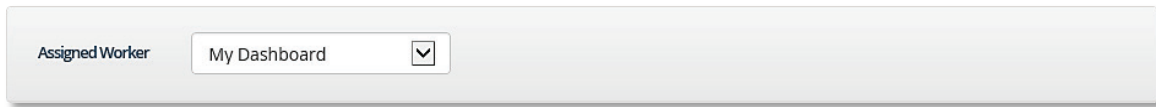


4. *User Menu*: The name of the logged in user will be displayed. Clicking on the drop-down will give the user the options to log out or navigate back to the Synergy splash screen.





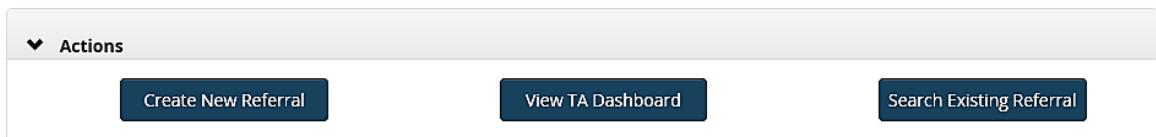
5. *Assigned Worker*: For all users (except Administrators and Supervisors) this drop-down will be locked to “My Dashboard” and will only show items assigned to that user.



The screenshot shows a light gray rectangular box. On the left, the text "Assigned Worker" is displayed. To its right is a dropdown menu with a white background and a small downward arrow icon on the right side. The dropdown menu is open, showing "My Dashboard" as the selected option.

- a. Administrators and Supervisors can select other users from the *Assigned Worker* drop-down to view those user's Dashboard.

6.  **Actions**: The *Actions* pane allows the user to: *Create a New Referral*, *View TA (Technical Assistance) Dashboard*, or *Search Existing Clients*.



The screenshot shows a light gray rectangular box with a header bar containing a downward arrow icon and the text "Actions". Below the header bar, there are three dark blue buttons with white text: "Create New Referral", "View TA Dashboard", and "Search Existing Referral".

- a. : This action button is used to create a new Referral and navigates to the Consumer Info screen of the new Referral.
- b. : This action button navigates the user directly to the **Technical Assistance Dashboard** screen.
- c. : This action button navigates directly to the **Search** screen to allow the user to search through existing referrals.

7.  **Pending Referrals** pane: This pane contains new Referrals that have not been reviewed and assigned yet.

8.  **Open Referrals** pane: This pane contains open Referrals assigned to the user.



Technical Assistance Dashboard

1. Navigate to the **Technical Assistance Dashboard** by either clicking **View TA Dashboard** in the **Actions** pane or using the **Technical Assistance** ▼ menu.
2. **Recent Technical Assistance** pane:

Technical Assistance

▼ Recent Technical Assistance (14)

View My TA ☒ **A** Search within TAs: **B**

TA Date	TA ID	School District	School Building	Type	Assigned User	Status
9/7/2017	200	N/A	N/A	System Building	Samantha Murphy	Open
9/5/2017	199 C	N/A	N/A	System Education	Samantha Murphy	Closed
9/4/2017	198	ABCD District	EFGH School	Crisis Response	Samantha Murphy	Open
9/1/2017	197	N/A	N/A	Meeting	Samantha Murphy	Closed
8/31/2016	137	N/A	N/A	Consultation	Samantha Murphy	Closed
8/18/2016	112	PITTSBURGH SD	N/A	Consultation	Samantha Murphy	Closed

Show entries First Previous **1** 2 Next Last

- a. The *Recent Technical Assistance* grid contains TAs from all of Dragonfly. The grid is automatically filtered to view only the logged in user's TAs ("View My TA"). To view all TAs, select "View All TA".
- b. Users can search for a specific TA or set of TAs by using the *Search within TAs* field.
- c. To view a TA, click on the *TA ID* in the grid.

For more information...

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access iService, go to: <https://servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm>