

New Treeview Toolbar Quick Access Buttons in Version 3.7

Quick Access buttons were added to SSIS in Version 3.6. Additional Quick Access buttons to make navigation faster in additional areas of Worker were added in Version 3.7. As with the previous Quick Access buttons, the type and number of buttons differs, depending what folder or node is selected in the treeview. The new Quick Access buttons for Version 3.7 are found at:

- Intake - covered on page two of the handout.
- Intake or Maltreatment Report node in a workgroup - covered on page three of this handout
- Participants folder and corresponding folders in a workgroup - covered on page three and four of this handout.
- Chronology node in all workgroups - covered on page five of this handout.

To display the Quick Access buttons:

1. Right click in the Treeview Toolbar area.
2. The Large Icons/Quick Access menu displays.
3. Click on **Show Quick Access buttons**.
4. The Quick Access buttons display.



*Hint: Changing the Treeview Toolbar buttons to **Large Icons** is enabled following the same steps.*

Below is a listing of the Quick Access buttons in Version 3.6. The new buttons for Version 3.7 follow on the next pages.

Version 3.6 Quick Access Buttons

Quick Access Buttons - Intake Node and Maltreatment Report Node



The Quick Access buttons at the Intake node and the Maltreatment Report node in a CP Assessment workgroup, from left to right are:

- Clients - Add Existing Client or New Client
- Collaterals - Add Existing Collateral or New Collateral
- New Allegation
- New Response Priority Tool
- New Maltreatment facility information.

Quick Access Buttons - Participants and Clients Folders



The Quick Access buttons at the Participants and Clients folders, from left to right are:

- New Address
- New Phone
- New Relationship
- New Disability.

Quick Access Buttons - Collaterals Folder

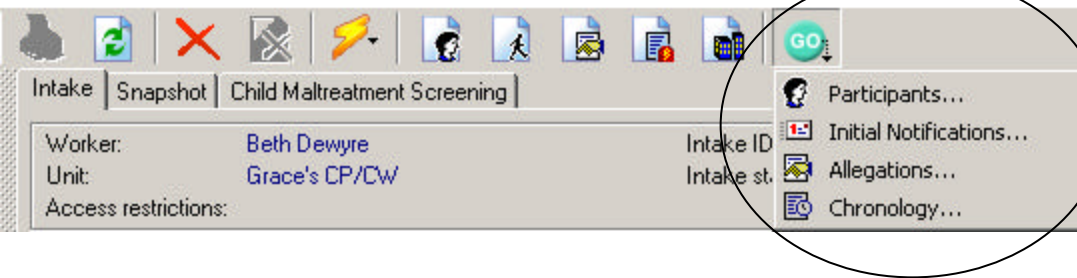


The Quick Access buttons at the Collaterals folder, from left to right are:

- New Address
- New Phone.

New Intake Quick Access Buttons in Version 3.7

Quick Access Buttons in Intake at the Intake Node



The **Goto** button, new to Version 3.7, allows quick navigation to the Participants, Initial Notifications, and Allegations folders and the Chronology node in the treeview.

Quick Access Buttons within an Intake at Participants Folder



The Quick Access Buttons at an Intake's Participants folder are:

- Home
- Clients
- Collaterals.

Quick Access Buttons within an Intake at Allegations Folder



The Quick Access Buttons at an Intake's Allegations folder are:

- Home
- New Allegation.

Quick Access Buttons within an Intake at Initial Notifications Folder



The Quick Access Buttons at an Intake's Initial Notifications folder are:

- Home
- New Initial Notification.

Quick Access Buttons within an Intake at Chronology Node



The Quick Access Buttons at Chronology node are:

- Home
- New Case Note
- New Document
- New Documentation
- New Contact/Activity.

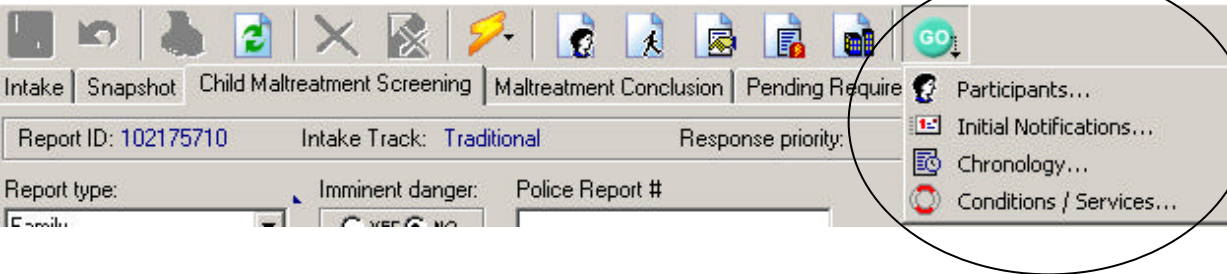
Home Button



The **Home** button is common to all Quick Access button locations in Intake. Clicking this button takes the user back to the Intake node in the treeview. Using both the **Goto** and **Home** buttons allows completion of an intake without using the tree.

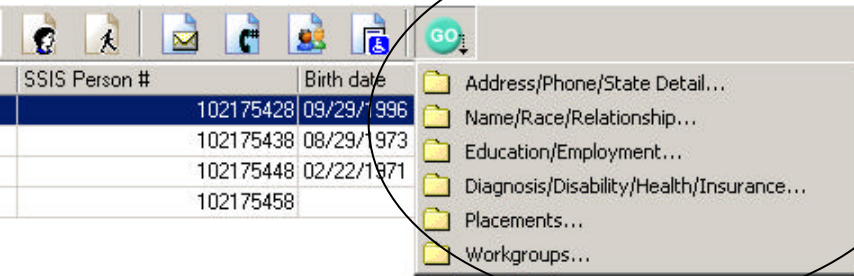
New Quick Access Buttons Within a Workgroup in Version 3.7

Quick Access Buttons at the Intake or Maltreatment Report Node in a Workgroup



Within a workgroup, the **Goto** button at the Intake or Maltreatment Report node allows quick navigation to the Participants and Initial Notifications folders and the Chronology and Conditions / Services nodes in the treewiew.

Quick Access Buttons at the Participants Folder in a Workgroup



At the Participants folder in a workgroup, the **Goto** button allows quick navigation to all the folders specific to the client selected in the detail panel. The **Goto** button is only available for clients.

New Quick Access Buttons Within a Workgroup at a Client's Folders in Version 3.7

Quick Access Buttons at a Client's Address/Phones/State Details Folder



The Quick Access Buttons at a client's Address/Phones/ State Detail folder are:

- Home
- New Address
- New Phone.

Quick Access Buttons at a Client's Name/Race/Relationship Folder



The Quick Access Buttons at a client's Name/Race/Relationships folder are:

- Home
- New Name
- New Race
- New Relationship.

Quick Access Buttons at a Client's Education/Employment Folder



The Quick Access Buttons at a client's Education/Employment folder are:

- Home
- New Education
- New Employment.

Quick Access Buttons at a Client's Diagnosis/Disability/Health/Insurance Folder



The Quick Access Buttons at a client's Diagnosis/Disability/Health/Insurance folder are:

- Home
- New Diagnosis
- New Professionally Determined Disability
- New Other Health
- New Health Care Provider
- New Insurance Policy.

Quick Access Buttons a Client's Placements Folder



The Quick Access Buttons at a client's Address/Phones/State Detail folder are:

- Home
- New Placement.

Quick Access Buttons at a Client's Workgroups Folder



The Quick Access Buttons at a client's Address/Phones/State Detail folder are:

- Home.

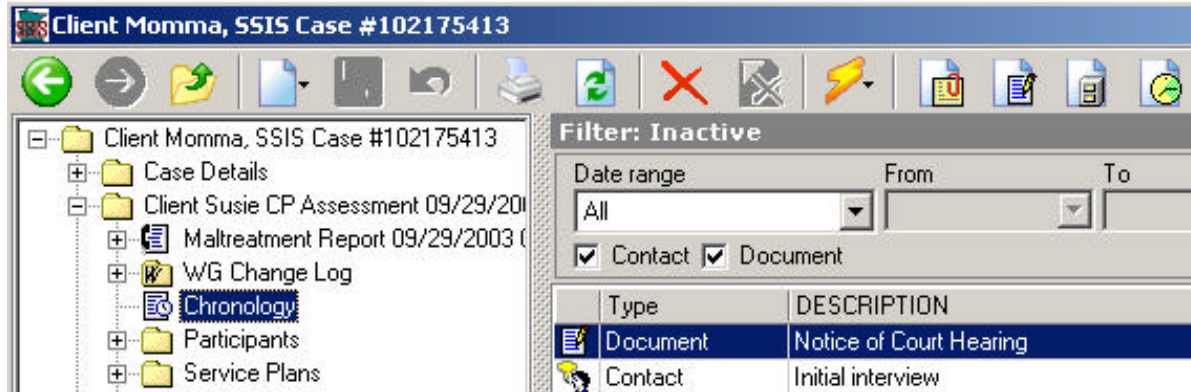
Home Button



The **Home** button is common to all Quick Access button locations from a client's folders. Clicking this button takes the user back to the Participants folder in the treeview. Using the **Goto** and **Home** buttons allows entry of all a client's information without using the tree.

New Quick Access Buttons Within a Workgroup in Version 3.7

Quick Access Buttons - Chronology



The Quick Access buttons in Chronology, from left to right, are:

- New Case Note
- New Document
- New Documentation
- New Contact/Activity.

The Quick Access buttons for Chronology are available in every workgroup.