Chapter 2: Navigation and Search
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| 2.7       | July 2018      | Updates to reflect Release 18.7                                                                                                            |
| 2.8       | August 2018    | Update screenshots re Curam v7 Upgrade                                                                                                      |
2.1 System Access and Accessibility

2.1.1 Browser and Display Considerations

The recommended screen resolution for the system is 1024 x 768. For information on how to change the screen resolution, please refer to Microsoft.

EOIS-CaMS uses standard web technologies and formats. The system is compatible with all internet browsers, however, Microsoft Internet Explorer 8, 9 or 10 is recommended. Text size can be increased, if needed, within the browser. For example, in Internet Explorer, this can be found under “View.”

For EOIS-CaMS Release 4.0, the recommended minimum hardware requirements are Intel™ Core2 @ 2.13Ghz or higher Processor with 2 GB RAM.

2.1.2 Browser Buttons

The back and forward buttons in web browsers should not be used when navigating through the system.

If experiencing issues such as unresponsive buttons in EOIS-CaMS while using Internet Explorer:

1. Press <CTRL> + <SHIFT> + <DEL>. This will allow for the deleting of browsing history (Temporary Internet Files, Cookies, and History should all be check-marked and Preserve Favourites website data should be unchecked).

2. Go to Compatibility View Settings and add the website: gov.on.ca

2.1.3 Time-Out Periods

A time-out is when the user is automatically logged out of the system. The time-out will occur when the system considers the user to be inactive. In order to be active, a user has to have clicked on a link or action within the current page. The time-out period is 15 minutes, and this cannot be adjusted. If the system times out, only data that was on a page that had not yet been saved will be lost.
2.2 Mouse and Keyboard Navigation

2.2.1 Single-click

The system is a web-based application. Just like browsing the web, the user should single-click on links and actions. Double-clicking within the system can lead to a duplicate action or slowing down.

2.2.2 Tabbing

The Tab key can be used to move through tabs and fields on pages in the system. Likewise, Shift-Tab can be used to move backwards through fields.

2.2.3 Scrolling

The user can scroll vertically and horizontally within the system. Once the user has clicked on, or tabbed to, a scrollable area on the page (an area with a vertical or horizontal scroll bar, or both) the user can either scroll by using the mouse, or by using the arrow keys on the keyboard.

2.3 Look and Feel

2.3.1 Navigation Components

EOIS-CaMS uses tab-based navigation to allow users to move quickly between records. There are three levels of tabs:

- System Tabs: which appear at the very top of every page and function much like the toolbar in previous releases. For example, the Workspace Tab always returns the user to their starting page;
- Primary Tabs: which appear below the system tabs and contain cases and participants profiles; and,
- Secondary Tabs: which appear within cases and participants profiles. In some cases, there will be multiple levels of secondary tabs.
2.3.2 Tab Content Bar

Some tabs have a left-hand Tab Content Bar. The items within the bar act as “sub folders” for the specific tab.

2.3.3 Shortcuts Panel

The Shortcuts Panel is hidden by default but contains alternate navigational features that were available in previous releases of EOIS-CaMS. Its use is not required.

2.3.4 Main Content Area

1. Page Title: the title of the current page the user is viewing.
2. Toggle: Much of the information contained within system pages can now be expanded and collapsed using Toggles, which can appear in multiple locations within the system
navigation, such as in the top-right corner of panels or to the left of items that appear in lists.

3. Context Panel: cases and participant profiles have a Context Panel that presents a key informational summary. This can be collapsed or expanded using its toggle. When expanding panels in the cascading navigation, it can be helpful to collapse the context panel so that there is more “real estate” on the page.

4. Information Panel: a panel that displays information or that has fillable fields. Information panels can be contracted or expanded using the toggle.

5. Main Content Area: the section of the page that is to the right of the navigation functions. This area is where section content is displayed and entered.

2.3.5 Home Pages

There are two main types of home pages in the system: the user’s home page and the home pages of participants and cases.

The user’s home page, which is known as the Workspace page, is the entry point to the system. The user is provided with his or her own home page within the system based on the user’s assigned system role. Each system role has its own home page with links to functions within the system that are commonly used by that system role. Clicking on the Workspace system tab will always bring the user back to the Workspace page.

Participants and cases also have home pages. These home pages are the central pages relating to a participant or case and can be accessed by clicking the Home tab in the participant profile or case.
2.3.6 Actions and Links

Within the main content area, there are four types of clickable text and buttons that will perform an action when selected. These are shown and described below.

1. **Action**: underlined text that performs a system function when selected. Actions appear the same as links but perform a different function. Examples of actions include “Save” and “Close.”
2. **Action Button**: presents actions in a drop-down menu that allows the user to quickly perform a number of context-specific actions. There can be a number of different action buttons on a page as they may relate to different items.
3. **Link**: a connection between pages. Similar to actions, a link will have text that is underlined.
4. **Refresh Button**: refreshes all the data on the page to ensure that the user is always viewing the most up to date information.
2.3.7 Pop-Up Windows

Pop-up window: allows the user to perform functions such as modifying, creating, and viewing records in a small window above the current page.

2.3.8 Display and Input Considerations

2.3.9 Mandatory Fields

Mandatory fields are indicated with a blue asterisk (*) and are fields that the user must complete to continue.

Entering Dates

Use the calendar icon to ensure the formatting of the date is correct. If users are using the calendar and the year is not current, the user:

- enters the appropriate year
- selects the appropriate month
- clicks on the appropriate day.

Dates can also be manually entered in the “DD/MM/YYYY” format.

2.3.9.1 Sorting Information

Users can sort records by clicking on the column header as long as the word is underlined. For example: name, date, location. Clicking on the header again will reverse the sort order of the list.

2.3.9.2 Magnifying Glass and Clear Value Icons
The magnifying glass icon is used to open a pop-up window that will allow the user to perform a search and select a result based on this search. Once a result is selected, it will appear in the field next to the magnifying glass. The clear value icon that appears next to the magnifying glass will clear the value of the field.

2.3.9.3 Postal Code Look-up

Addresses in the system are entered using a centralized Postal Code Look-up application. By entering a client’s postal code and clicking SEARCH, an Address Details pop-up page is opened.
2.3.9.4 Address Details

Within this page, a client’s information can be edited for accuracy. When finished, the user must click CONTINUE which will populate the information into the client’s profile.

Common Actions

When clicked, an action performs a system function. The system has a number of actions that are consistent throughout all pages.

SAVE: creates a new record from the information entered on the page.

SAVE & NEW: creates a new record from the information entered on the page and resets the page allowing an additional record to be created.

CANCEL: dismisses any information entered and returns the user to the previous page.

EDIT: allows the user to modify the information displayed.

SEARCH: allows the user to perform a search for items that fit the search criteria.

RESET: clears the information within the search fields allowing the user to start a new search.
2.4 My Workspace

The Workspace page is the entry point to the system. Each system role has its own home page with links to functions within the system that are commonly used by that system role.

2.4.1 My Workspace Pods

The 18.7 Release of CaMS saw the introduction of Pods onto the Workspace tab. These pods are collections of information and links that can be added, moved and removed.
2.4.1.1 Moving a Pod

System Steps:

- Step One: Click on the Pod and Hold
- Step Two: Drag the Pod to desired location and release.

2.4.1.2 Removing a Pod

System Steps:

- Step One: Click on the X in the top right corner of the pod

The pod will now be gone.

To re-add a pod that was previously deleted, follow these system steps:

- Step One: Click on Customize in near the top right hand corner of the screen.
- Step Two: Click on the My Shortcuts box and click Save
The pod will now appear back on the Workspace page.

Note: If you are part of a Service Provider delivering SkillsAdvance Ontario Phase 2, you will see an additional pod in the upper right-hand corner of your Workspace. It is titled SAO Phase 2 Customer Satisfaction Survey pod, and contains links to SAO Phase 2 cases that you manage which have a Customer Satisfaction Survey entry due. This pod works the same as the My Shortcuts pod.

2.4.2 My Shortcuts

The Workspace page contains shortcuts relevant to the user role. For example, the caseworker user role includes a shortcut to the pages necessary to create a new Employment Ontario Case or find a case.

To use a shortcut, follow the below system steps:
Step One: Hover mouse above the Shortcut name. An underline will appear under the link you are hovering over

Step Two: Click on shortcut link.

2.4.3 My Cases

VIEW MY CASES allows the user to view their opened and closed cases. This list can be sorted by clicking on the column headers.

2.4.4 Pending Reviews

Users can also view a list of pending reviews using the PENDING REVIEWS link within My Shortcuts. This page lists all cases in closed status with no actual end date where the user is a reviewer.

2.4.5 System Tabs

System tabs appear at the top of each page, and the individual tabs never change. Each tab is a shortcut to frequently used functions.

2.4.6 Workspace

Workspace takes the user back to the Workspace page.
2.4.7 Cases and Outcomes

Cases and Outcomes opens the primary tabs the user has open, such as cases, participants, or search pages.

2.4.8 Tasks

Tasks allows the user to access system tasks and notifications. There are tabs for Assigned Tasks, Deferred Tasks and Reserved Tasks.

Additional functionality relating to tasks and notifications can be found in the Shortcuts Panel.

2.4.9 Calendar

Calendar takes the user to the My Calendar page, which is explained in Section 2.9.

2.5 Case Search Bar

The Case Search Bar can search for any type of case in the system using a case reference number. A user can search for an Employment Ontario Case or any type of service plan from any page as long as they the case reference number.

2.6 Preferences

Preferences allow users to set individual preferences of how pages will be displayed in the system.

List menu enabled: Do not touch this preference. Leave it set to the default of “No” or navigational action links will disappear from the list returns.

High Contrast Mode: Do not touch this preference; leave it set to the default of “No.”

Modal dialogs enabled: If “Yes” is selected, then the user will be using pop-up windows when creating, modifying and viewing records. The user can select to run the application with or without the use of pop-up windows. The system defaults this feature to “Yes.”
2.7 Log Out

Log Out safely logs the user out of the system.

It is recommended that the user always use this icon instead of closing the web browser for security purposes.

2.8 My Calendar

This function can be accessed by clicking on the Calendar system tab. Events are displayed in list form.
2.8.1 Activities

Activities are created by a user to book time on the calendar to work on a given case. Activities can be assigned by the user for the user, or can be sent to another user as an invitation.

2.8.1.1 Create Activity

System Steps

歪 Step 1: Create Activity Page

Complete the necessary fields and click SAVE, SAVE & NEW, or SAVE & INVITE. Clicking SAVE will return the user to the calendar and SAVE & INVITE allows the activity to be sent to another user as an invitation.

2.8.1.2 Create Recurring Activity

Creating a recurring activity allows the user to book the same activity for more than one occurrence. Complete the necessary fields and click SAVE, SAVE & NEW, or SAVE & INVITE. Clicking SAVE will return the user to the calendar and SAVE & INVITE allows the activity to be sent to another user as an invitation.
2.9 Search

There are a number of search types available to a user within the system. If a user requires more information on a person, employer, case, service provider or another user, a search must be performed. Each search has a variety of parameters that will allow the user to filter through the records. Search criteria and search results appear on the same page throughout the various search types. Within the search results, the user has the ability to re-sort the results and view the appropriate home page linked to a specific record. The default sort order for the majority of searches is by the unique identifying number (e.g., Reference Number, Task ID, etc.) in ascending order.

The RESET action appears on all search pages. This action quickly clears all information entered in the search fields.

The CANCEL action only appears on search pages that are activated from another page. For example, if a Person Search is performed from the Case Search page, the Person Search page will contain the CANCEL action allowing the user to return to the previous page.
The wildcard “%” can be used in most non-numeric search fields (those without numbers). For example, searching “Sm%h” would find “Smith.” Also, most non-numeric search fields automatically search for values that contain what is entered in the search field. For example, “Smi” would find “Smith.”

### 2.9.1 Person Search

The Person Search allows for users to search for client records. This search must be performed prior to registering the person. There are a number of search parameters, including: reference number, last name, first name, date of birth and gender.

**System Steps**

- **Step 1: Workspace Page**
  Select the **Cases and Outcomes** system tab.

  ![Workspace Page Screenshot](image)

- **Step 2: Cases and Outcomes Page**
  Open the **Shortcuts Panel**.

![Shortcuts Panel Screenshot](image)
.lucene Step 3: Cases and Outcomes Page
Click FIND PERSON.

.lucene Step 4: Person Search Page
Enter the search criteria, and click SEARCH.
If there are not enough search criteria entered, the system will display an error message.

The **First Name** and **Last Name** fields will perform a search by partial names. For example, when entering “Soren” in the **Last Name** field, the system will perform a search for last names that contain “Soren,” like ”Sorenson,” ”Sorensen.”

The box beside the **First Name** field is the nickname option. When selected, the system will search for similar names. For example, when entering “Bill” in the **First Name** field, and selecting the checkbox beside the field, the system will perform a search for ”Bill,” ”Billy,” “Will,” and ”William.”

The system will ignore special characters (accents) and case (upper and lower) when searching in the **First Name** and **Last Name** fields.

**☞ Step 5: Person Search Page**

The system will display the results that match the search criteria in the **Search Results** information panel. The number of items returned in the search is indicated in the information panel header.

If the client is registered, click on the corresponding REFERENCE NUMBER link to display the Person Home page.
Search results are limited to a maximum of 50 matches, but the system will display the total number of matches. If the system displays 50 matches, the intended registered client may not be listed in the results. Enter more information in the search criteria to reduce the amount of results the system displays.

2.9.2 Case Search

There are three types of cases that can be searched on the Case Search page: Employment Ontario Case, product delivery case and service plan. There are a number of search parameters including case and client reference numbers, client name, category and program and status. Case Search also allows the user to retrieve the client name by performing a Person Search.

System Steps

✦ Step 1: Workspace Page
Click SEARCH FOR A CASE.
Welcome to the EOIS Case Management System

- My Shortcuts
  - Register a Person
  - Register an Employer or a Corporate Entity
  - My Service Provider
  - Pending Reviews
  - Reassign Cases
  - Reassign Reviews
  - Search for a Case
  - Search for an Application
  - Search for a CO/JG Application
  - Search for a LMI Application
  - Search for a Corporate Entity
  - Search for an Employer
  - View My Bookmarks
  - View My Cases
Step 2: Case Search Page

Enter search criteria for a case. If using the **Client Name** field, clicking on the magnifying glass will open a pop-up window for a Person Search. This search can be completed as outlined in 2.9.1 Person Search, step 3. Click SEARCH.

![Case Search Page](image)

Step 3: Case Search Page

The system will display the results that match the search criteria in the **Search Results** information panel. The number of items returned in the search is indicated in the information panel header.

Click on the corresponding SELECT link.

![Search Results](image)

2.9.3 Employer Search

An employer search is required when completing the employment background for a client who has employment associated with either an Employment Service placement with incentives or
an Employment Service placement without incentives. This search option will only appear when one of these placement types has been selected.

System Steps

ē Step 1: Person Home Page
Within a client’s profile, click the **Background Tab** and click the **Employment** button in the tab content bar.

ē Step 2: Employment Page
Click NEW if adding a record or click EDIT in the **Action Button** next to the record being modified.
Step 3: Create Employment Page

The Employment Type (1) drop-down menu must be completed with “Placement” for the Employer magnifying glass icon to appear. Click on the magnifying glass icon (2) to search for the employer.

Step 4: Employer Search Page

Enter search criteria for an employer, and click SEARCH.

The Reference Number will also search for business numbers. Trading Name and Registered Name are two separate fields. If using only one of these search criteria, the user should search by the Trading Name.

Step 5: Employer Search Page

The system will display the results that match the search criteria in the Search Results information panel. The number of items returned in the search is indicated in the information panel header.

Click on the corresponding SELECT link to populate the employer information into the Create Employment page.
2.9.4 User Search

To assign a task to another user, invite another user to a meeting using the calendar function, or to change the owner of a case, a User Search will need to be performed. This search type cannot be accessed through shortcuts. If a user search is available within a page, a magnifying glass icon will be located next to the field.

System Steps

 Step 1: Workspace Page
Click the Tasks system tab.

 Step 2: Tasks Page
Open the Shortcuts panel and click CREATE TASK.
cassert unique {assert unique} 

**Step 3: Create User Task Page**

In the drop-down menu for the **Assign To:** field, select “User” (1). Click on the magnifying glass icon (2) to search for a user.

**Step 4: User Search Page**

Enter search criteria for a user, and click SEARCH.
Step 5: User Search Page

The system will display the results that match the search criteria in the Search Results information panel. The number of items returned in the search is indicated in the information panel header.

If the user is registered, click SELECT next to the corresponding user and the information will be populated to the relevant page.
Step 6: Create User Task Page

To finish the task, clicks SAVE or SAVE & NEW.

### 2.9.5 Service Provider Search

The Service Provider Search allows the user to find service providers contracted with the ministry.

**System Steps**

1. **Step 1: Workspace Page**
   - Click the **Cases and Outcomes** system tab.
Step 2: Cases and Outcomes Page
Open the Shortcuts panel.
Step 3: Cases and Outcomes Page
Click the Service Provider button.

Step 4: Cases and Outcomes Page
Click FIND SERVICE PROVIDER.

Step 5: Service Provider Search Page
Enter search criteria for a service provider, and click SEARCH.
Step 6: Service Provider Search Page

The system will display the results that match the search criteria in the **Search Results** information panel. The number of items returned in the search is indicated in the information panel header.

If the service provider is registered, click on the corresponding **REFERENCE NUMBER** link to display the service provider’s page.
2.9.6 Service Delivery Site Search

The Service Delivery Site Search allows the user to find service delivery sites attached to service providers registered in the system.

☞ Step 1: Workspace Page

Click the **Cases and Outcomes** system tab.

![Image of Workspace Page]

☞ Step 2: Cases and Outcomes Page

Open the **Shortcuts** panel.
Step 3: Cases and Outcomes Page
Click the **Service Provider** button.

Step 4: Cases and Outcomes Page
Click **FIND SERVICE DELIVERY SITE**.
Step 5: Service Delivery Site Search Page

Enter search criteria for a service delivery site, and click SEARCH.

Step 6: Service Delivery Site Search Page

The system will display the results that match the search criteria in the **Search Results** information panel. The number of items returned in the search is indicated in the information panel header.

If the service delivery site is registered, click on the corresponding REFERENCE NUMBER link to display the service delivery site’s home page.

The address displayed in the search results is the service delivery site’s business address.