Merative Social Program Management 8.1

Cúram Personalised Pod Page Configuration Guide

Note

Before using this information and the product it supports, read the information in Notices on page 21

Edition

This edition applies to Merative™ Social Program Management 8.0.0, 8.0.1, 8.0.2, 8.0.3, and 8.1.

Contents

1 Configuring Personalized Pod Pages

Use this information to configure personal pod pages. Personal pages contain multiple pods. Various registered pods can be configured to for a page. Pre-defined pods are available for the different user roles.

1.1 Introduction

Purpose

The **Pod Configuration** guide describes the configuration options for personal pages, and their associated pod displays. It describes how to define and configure the personal page and how to choose which pods are displayed on it.

Be advised that the configuration options for the announcements functions on the user home page are described in the *Cúram Organization Administration Guide*.

Audience

This guide is intended for administrators responsible for configuring the personal page components. It is assumed that the administrators will be familiar with how application views are presented and maintained in the application.

Chapters in this Guide

The following list describes the chapters within this guide:

- **Introducing personal pages**
  This chapter explains the concepts of Pods and personal pages.
- **Configuring personal pages**
  This chapter describes how to configure the appearance of a personal page and the available performance related options.
- **Quick Links**
  This chapter explains the concept of quick links and how they are configured.
- **Personalizing a page**
  This chapter describes how users can personalize their personal page by adding, removing and hiding pods.
- **Application Properties for Personal Pages**
  This chapter provides a summary of the application property settings for personal pages.

Further Reading

The `Pod Developers Guide` provides instructions for developers on how create personal pages and the associated Pods.

1.2 Introducing Personal Pages

What is a Personal Page?

Personal pages are client pages that can be customized by a user. Personal pages contain multiple Pods. The user may alter the content and layout of the personal page by rearranging the Pods on the page, by adding additional Pods or by hiding Pods.

What is a Pod?

A Pod is a container, within which a set of data is presented to the user. This data is configurable, and could be presented in a number of formats, such as list, a chart or some other graphical view. For example a Pod might contain a snapshot view of key data required by the user to complete their work for that particular day.

Personal pages allow users to focus on the data that is most important to them. Users can personalize the page to fit their own specific needs.

Application Views and Personal Pages

An Application View presents a user with a pre-defined view of the application specific to their user role. The user will see the sections, shortcuts, searches and tabs that are relevant to their role. Each application view has an associated home page which can be a personal page. The process of defining a user includes allocating an application view to the user. This defines which application view and associated home page will be displayed when that user uses the application. As part of the personal page configuration, administrators can choose which pods are to be displayed by default, and which ones can be added at the discretion of the user. See The Customize Panel on page 18

How are Personal Pages created?

Before administrators can configure the display for a personal page, the page itself, and its associated pods must have already been created. This is a development task, and the *Pod Developers Guide* provides instruction on how create personal pages and any associated pods.

Pre-defined Pods

A number of pre-defined Pods are provided out of the box. These are associated with one or more application view user roles. Some of the common Pods are associated with multiple application view user roles. For example the My Appointments Pod is associated with most application user roles. In contrast, specialized Pods are associated only with those application view user roles to which they are relevant. For example, a Caseload Summary Pod for Caseworkers and a Resolved Investigations Pod for Investigators. 1.4 Pre-defined Pods on page 12 describes each of the pre-defined Pods which are available for the different user roles. A Quick Links Pod is also provided for most application user roles. 1.5 Quick Links on page 16 provides some more detailed information about the Quick Links Pod and how it can be configured.

1.3 Configuring Personal Pages

Introduction

This Chapter describes how personal pages can be configured by administrators. The personal page wizard guides the administrator through the process of configuring a personal page. The administrator can select from the registered Pods which Pods to include on a page, which pods are to be displayed by default, and which ones can be added at the discretion of the user.

Configuring a Personal Page Using the Wizard

This Section describes how personal pages are configured by administrators. All registered pods are displayed within the user interface section of the administration application, and administrators can select and include these on any personal page.

Page ID

In the Page ID wizard step the administrator identifies the UIM page to be configured by entering its page ID.

User Role

In the User Role wizard step the administrator selects a security role. This allows the administrator to create different views of the page depending on the user's role. If the administrator does not select a security role then a default record for the page is created. This default is used if a user opens a page that does not have a configuration specific to their security role.

Available Pods

In the Available Pods wizard step the administrator selects which pods are to be available on the page.

Default Pods

In the Default Pods Wizard Step the administrator selects which pods are displayed on the page by default. When a user first accesses their personal page they will see these Pods. The list presented in this step is a subset of the list selected in the previous step.

The user will be able to alter the selection to suit their personal preferences. See 1.6 Personalizing a Page on page 18

Page Layout

In the Page Layout Wizard step the administrator can define the number of columns on the personal page. Users can personalize the page by moving a pod from one column to another. The default number of columns is 3. The columns will all be of equal width. So if the administrator chooses to have 4 columns, each column will be 25% of the width of the page.

Performance Considerations

There are a number of application property settings which can be used to optimize the performance of Personal pages. These properties are listed in full in 1.7 Application Property Settings for Personal Pages on page 19

Lazy Loading

Depending on the content a personal page can load more slowly than a typical application page. This can happen if there is a large amount of Pods displayed on the page and/or the Pods contain large amounts of data. The personal page provides a lazy load feature which enhances the user experience. When switched on, the lazy load feature loads the first n rows of Pods, where n is configured by the Administrator. The remaining rows of Pods are subsequently loaded. This allows the user to continue working without waiting for all Pods to load.

There are a number of lazy loading application property settings which allow administrators to have flexibility as to how personal pages are loaded. The lazy load settings are applied to all personal pages. See 1.7 Application Property Settings for Personal Pages on page 19 for further details.

Limiting the Number of Items in a List

Pods typically contain lists of data, such as participants or cases. Each pod which contains a list has an application property setting which determines the maximum number of list items that can be displayed for it. This can be set by an administrator.

1.4 Pre-defined Pods

The **My Current Cases** pod gives users who manage small caseloads a list of cases that are in a state other than closed. This function allows users to see all their cases as soon as they log in for the day. Because the pod shows all the current cases, it needs to be configured into an application view only if a caseload is less than approximately 20 cases. For caseloads beyond that number, it is recommended the pod not be configured and that users access the **My Cases** list page. The **My Cases** list page provides the same information but in a much more understandable format for larger lists.

Two properties exist that are used to configure the number of cases. The `curam.currentcasespod.caselist.default` property specifies the default number of cases to display in the pod (the number of cases the user sees in the pod). The `curam.currentcasespod.caselist.max` property specifies the maximum number of cases that can be displayed in the pod (that is, if this limit is set to 15 and the caseload is 20, only 15 are displayed).

Introduction

The section on Pre-defined Pods describes each of the pre-defined pods that are provided for the different user roles that are listed in the following topics.

My Appointments

The **My Appointments** pod gives users a snapshot of the appointments they have on a specific day. Immediately after the user logs in, users can get a sense of how much time remains for them to complete tasks outside of their scheduled appointments.

The main features of the pod include the following elements:

- Listings of meetings, recurring activities and activities for the logged in user. (Alternatively, the user can view the same appointments by way of their user calendar).
- The calendar is highlighted with the day the appointments represent. The user can click a day in the week to see the appointments for the selected day. (The original list is replaced with the appointments for the day selected).
- The default date that is displayed when the user first logs in is today and is highlighted.
- A separate icon (denoted by a triangle in the corner of the day) is displayed to show whether appointments are scheduled on that day. When the icon is not displayed, it means that no appointments are scheduled on that day.
- The appointments list displays the appointment start and end time.
- A different icon is displayed to denote whether the appointments are an activity, recurring activity, or meeting.
- Each appointment displays the subject, which is hyperlinked. On selecting a link, the view **Activity**, **Recurring Activity**, or **Meeting** modal is displayed.
- If the **All Day** Indicator is set for an activity, recurring activity, or meeting, then these events are displayed at the start of the list with the time text that displays **All Day**'.

My Items of Interest

The **My Items of Interest** pod allows users to view a subset of items that are marked as an Item of Interest. The full list is accessed on the **My Items of Interest** page.

The main features of the pod include the following elements:

- The name of the item that is marked is displayed, followed by the reference, the primary client name, and client reference.
- The reference text is hyperlinked and on selection the relevant tab is opened in the workspace section of the application.
- The **My Items of Interest** link directs the user to the full list page.

My Tasks

The **My Tasks** pod allows users to establish the work they need to focus on for the day. After users log, they immediately can see any tasks that are assigned (reserved) for them directly. The pod provides a snapshot of their tasks – the user still need to manage their full list of tasks within the inbox section of the application

. The main features of the pod include the following elements:

- Tasks that are listed by oldest deadline date.
- A count of the number of tasks that are displayed in the pod versus the overall number that is assigned to the user.

- Any tasks where the deadline date is passed displays an overdue icon and a count of overdue tasks is also displayed in the pod header area.
- Selecting a task opens the task in its own tab within the inbox section of the application.
- The **My Tasks** link takes the user directly to the **My Open Tasks** list page that displays the full list of tasks that are assigned to the user.
- The **Create Task** button opens a **New Task** modal that provides users with an alternative way of creating a new task.
- A filter feature also is provided on the pod that allows the user to filter the tasks that are displayed. For example, the user can choose to view tasks that are overdue, tasks that are due today, or tasks that are due this month.

Caseload Summary

The **Caseload Summary** pod gives caseworkers a summary view of their caseload by status. It provides a quick way of establishing which cases might need to be focused on more urgently.

For example, if the caseload shows many cases in the **Submitted** state (which means they are awaiting approval), it might prompt the user to follow up on getting the cases that are approved by their supervisor. It also allows the user to get a sense of the overall size of the caseload they are managing. The main features of the pod include:

- A bar chart to provide a graphical display of the caseworker's assigned Product Delivery cases by status.
- The case statuses are displayed on the horizontal axis. The statuses depicted are **Open**, **Submitted**, **Suspended**, **Active**, and **Approved**.
- The case numbers are displayed on the vertical axis (the number scale varies depending on the number of cases displayed).
- When rolling the mouse over a column, the system displays the number of cases matching that status.
- The **My Cases** link navigates the user to the **My Cases** list page, which opens in a tab in the application workspace section.

Resolved Investigations

The **Resolved Investigations** pod provides investigators with a snapshot of how their investigations were resolved within a period. It allows them to see how many of the investigations they resolved were founded or unfounded.

The main features of the pod include the following elements:

- A pie chart that represents the investigation status and resolution status.
- A filter feature is provided on the pod that allows investigators to see the resolved investigations for a defined period. For example, the user can choose to view investigations resolved today or in the previous week.

Investigations Awaiting Approval

The **Investigations Awaiting Approval** pod provides investigators with a view of the investigations they own or they submitted that still are waiting for approval. It allows them to see quickly if they need to follow up on seeking approval from their supervisor.

The main features of the pod include the following elements:

- Display of investigations that are owned by the user that were submitted for approval but have yet to be approved.
- Displays investigations by oldest date submitted.

My Case Queries

The **My Case Queries** pod provides caseworkers with a list of their saved **Case Queries**.

The main features of the pod include the following elements:

- A count of the case queries that are displayed in the pod versus the overall number of queries that are saved. The pods are configured to display a set number of records. When the number of queries exceed the display limit for the pod, the user still is able to see how many queries exist outside the display. They then can select a link that directs them to the full **My Case Queries** list.
- The action **New Case Query** allows the user to set up, run, and save a case query.
- The **My Case Queries** link directs the user to the full list page.
- The name of the query is hyperlinked. Upon selection, the system runs the query and displays the results in a tab within the workspace section.

Assigned Workload

The **Assigned Workload** pod provides supervisors with a list of the users who currently are reporting to them, and their current assigned workload totals. This information helps supervisors gauge how workloads are being managed or require balancing across the team.

The main features of the pod include the following elements:

- Display of all users who are reporting to the supervisor.
- The user's name link opens the user workspace tab.
- The **Assigned** total includes the total number of integrated cases, product delivery cases, service plans, appeals, and investigations assigned to that user.
- The number of users who are displayed in the pod against the overall number of users who are assigned to the supervisor.
- The **My Users** link directs the user to the full list page.

My Work Queues

The **My Work Queues** pod provides supervisors with a view on the work queues they are responsible for overseeing. The view allows them to see quickly how many tasks still are not reserved by the team against the numbers of members who can reserve tasks in that work queue. As a result, the supervisor might decide to move some users to a different work queue or subscribe more users to another.

The main features of the pod include the following elements:

- A count of the number of work queues that are displayed in the pod against the total number of work queues the supervisor manages.
- A filter feature is included that allows the supervisor to view either work queues that the user is subscribed to directly or that are subscribed by association with an organization object such as a position or organization unit.
- The work queue name is hyperlinked. After selection, the user is directed to the specific **Work Queue** tab.
- The number of currently assigned users to the user subscribed or organization object subscribed work queue is displayed.
- The numbers of tasks represent the total tasks in the work queue that are unreserved.

My Organization Units

The **My Organization Units** pod provides supervisors with a view of tasks for each of the organization units to which they are assigned. This feature allows the supervisor to manage and monitor workloads across organization units.

The main features of the pod include the following elements:

- The **My Org Units** name hyperlink directs the user to the **My Organization Units** list tab.
- The number of members that are displayed is the active users who are associated with the organization unit.
- The number of tasks represent the number of unreserved tasks that are assigned to the organization unit.

Organization Summary

The **Organization Summary** pod provides an administrator with a summary of the active organization and location structures maintained. The pod displays details that relate to a specific organization structure.

The main features of the pod include:

- A display of the total of **Organization Units**, **Positions**, **Users**, and **Locations** recorded for the active organization structure.
- Each number total is linked to the relevant list page in the active organization tab.

1.5 Quick Links

What are Quick Links?

Quick links are a collection of links to frequently used application pages, which allow users to complete common actions. For example, searching for a person or accessing a page containing a list of the users assigned cases. These quick links are mapped to application views, and will appear in the quick links pod on a users personal page.

Quick links can be configured manually through the admin application.

There are sample configuration definition files for the quick links pod in the *<EJBServer_Dir>/components/core/data/demo* data folder. You can use these sample configurations by building the demo data. Sample configurations of demo data provide pre-configured content in the application to allow access to the given functionality within the context of an end to end process. If you do not wish to use the predefined quick links, you can remove them using the admin application.

Configuring Quick Links

Administrators can create and maintain quick links which link to any application page. Once the quick link has been created it can be assigned to an application view and to a user role.

Associating Quick Links with an Application View

Administrators can assign quick links to specific application views. They will then appear in the quick links pod on the application home page.

Setting the recommended number of Quick Links

For usability purposes a default number of quick links is recommended. If the number of recommended quick links for an application view user role is exceeded, a warning message is displayed. Administrators can override this setting via the `curam.admin.defaultnoofquicklinks` application property setting.

Setting the Quick Links Order

To enable quick link sorting the system administration property *curam.userinterface.quickclinks.order* must be set to "YES" and published. Administrators can then specify the order in which quick links appear, specific to the associated application view.

8.1.0.0 *Translating Quick Link Names*

If your Merative™ Social Program Management application supports more than one language, you can add translation text for quick link names to support users who use that language. You can also modify existing translation text for a quick link name.

About this task

The application uses the correct language at runtime based on the user's locale. If Social Program Management supports a single language, but that language is not English, you can edit the quick link names in that language by selecting the **Edit** action for the quick link whose name you want to update.

Procedure

1. Log in to the Social Program Management application as an administrator.
2. Click **Administration Workspace** > **Shortcuts** > **User Interface** > **All Quick Links**.
3. Locate the quick link whose name you want to translate.
4. Do one of the following:
   - Add a new translation.
     1. Click **Add Translation**.
     2. Select the language for the quick link name translation.

3. Enter the translation for the quick link name text.
4. Click **Save**.

- Modify an existing translation.

  1. Click the **Edit** action for the translation you want to modify.
  2. Edit the translation for the quick link name text.
  3. Click **Save**.

5. Click **Close**.

Results

The quick link name is translated with the changes you made. Log in to Social Program Management as a caseworker and view the Quick Links pod on the application home page. The quick link name is displayed in the language based on the user's default locale.

For more information about configuring text translations, see the *System Administration Guide*. For information about developing localizable text translations, see the *Web Client Reference Manual*.

1.6 Personalizing a Page

Displaying and Hiding Pods

A user can decide which Pods are displayed on their personal page. On logging into the page, they will then be presented with those default Pods which are appropriate to their application view user role. However, they can choose to collapse, expand and close these Pods, as well as add new Pods onto the page. The updated setting will persist across sessions i.e. If the user leaves the page and/or logs out and then returns to the page, the most recently selected options will be re-displayed.

Collapsing and Expanding Pods

Each Pod can be collapsed and expanded as required. A collapse/expand arrow is included on the pod title bar, adjacent to the pod title itself. This allows the user to hide the content of particular pods, so that they can focus on critical data contained within other pods. This is especially useful when there is a lot of information displayed on a page.

Closing Pods

Each Pod can be closed and removed from the personal page. A close button is included on the right hand pod title bar. Once the pod has been removed from the personal page it can be re-included via the customize panel.

The Customize Panel

Each personal page includes a customize panel. This panel allows the user to add and remove both default and additional pods assigned to their application view user role. Once the user selects to 'Save' the new settings, the personal page is updated to reflect the new preferences. To return to the default personal page for their application view user role, the user can select the 'Reset' button in the customize panel.

Moving Pods

Users can drag and drop pods to different areas of the page to suit their display needs. The user clicks and holds the title bar and begin dragging the Pod. A drop indicator highlights the current drop location as the Pod is being dragged. Releasing the mouse button drops the Pod in the current drop location. The new page configuration is saved when the Pod is dropped.

Filtering Pods

Pods can be configured to include editable data sets. In these instances, the user is able to filter which data is displayed in the Pod. Pods which have editable data also include an edit button, displayed on the pod title bar. Once selected, the pod is expanded to display the filter options.

Once the user selects 'Save' the personal page is refreshed to display the new data.

Reloading the Page

The personal page can be reloaded by the following actions:

1. Selecting 'Save' in the customize console
2. Selecting 'Reset' in the customize console
3. Selecting 'Save' in the Pod filter panel
4. Selecting the 'Refresh' icon on the personal page
5. Refreshing the browser

After a page reload all Pods are updated with the latest data sets.

1.7 Application Property Settings for Personal Pages

Pod Loading and Display Property Settings

Table 1: Pod Loading Application Property Settings

The following Table provides a summary of the pod loading application property settings.

Application Property	Summary
pods.podcontainer.lazyload.on	Determines whether or not the personal pages use lazy loading with Pod containers.
pods.podcontainer.lazyload.initialrows	Determines the number of rows of Pods initially loaded in the personal page.
pods.podcontainer.lazyload.poddropdelay	Determines the number of milliseconds between the introduction of each lazy loaded Pod.
pods.podcontainer.lazyload.podfadeinduration	Determines the number of milliseconds the fade in animation takes when lazy loading a Pod.

Quick Links Configuration Options

Table 2: Quick Links Application Property Settings

The following Table provides a summary of the quick links application property settings.

Application Property	Summary
curam.admin.defaultnoofquicklinks	Determines the recommended number of quick links to be displayed for all application view user roles.

Maximum Pod List Size Property Settings

There are a number of application property settings to determine the maximum list size for each Pod which contains a list. These are located within the Application - Custom Widget Configuration Category.

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