TOBI: GETTING GUIDE FOR WRAPAROUND FACILITATORS & ACCESS SITE USERS

LOGIN TO TOBI
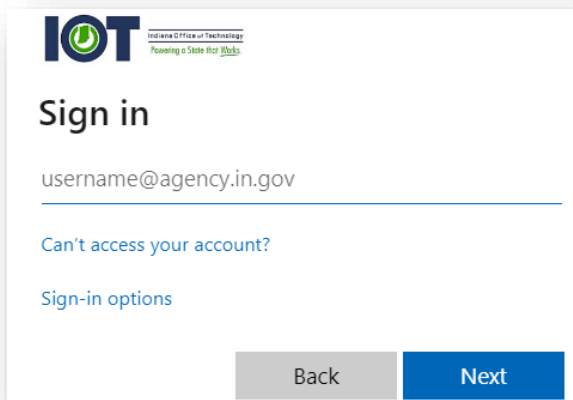
The URL for Tobi: https://tobi.crm9.dynamics.com

You will probably want to add this to your Favorites/ Bookmarks in your web browser. The preferred web browsers for Tobi are Google Chrome or Chrome Edge.

The initial login should be completed in a private browsing window. To open a private browser click the three dots in the top right corner of the web browser, then drop down to new 'private' or 'incognito' window.

You will be prompted to enter your state network credentials:
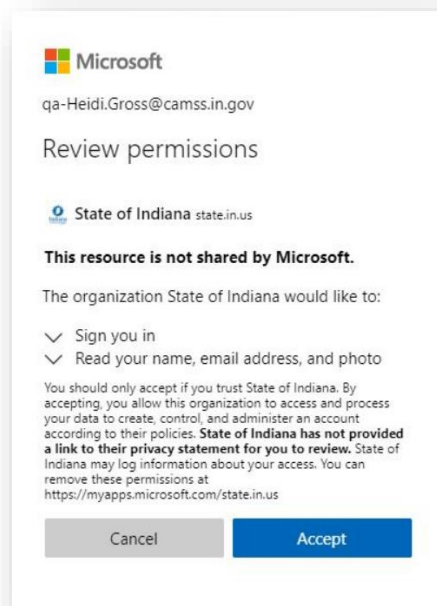

Be sure to enter the 'camss.in.gov' login assigned to you. This is not case sensitive.

The password is case sensitive.

The initial login will review permissions to register the account. Select 'Accept' to allow the account to be registered.

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REVIEW TOBI PREFERENCES

Once you are logged into Tobi, you will need to review your preferences.
- Select the Gear Icon in the ribbon
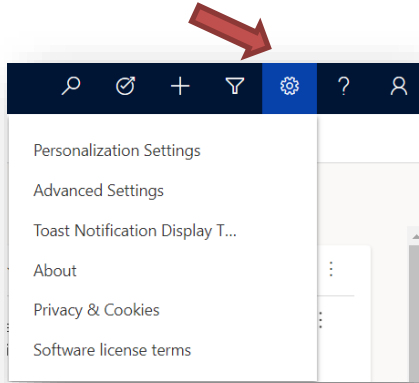
- Select Personalization Settings

On the General tab, starting at the top, set the following:
1. Default Pane: Workplace
2. Default Tab: Dashboards
3. Number of records shown: 50
4. Time Zone: Eastern Time
5. Currency: US Dollar

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CHOOSE YOUR DEFAULT DASHBOARD

The Microsoft Dynamics CRM Overview is the initial default Dashboard. Click the drop-down to choose another dashboard to be your default.

From the drop-down list select your preferred dashboard. Once you have chosen your preferred dashboard select 'Set as Default' from command line above.

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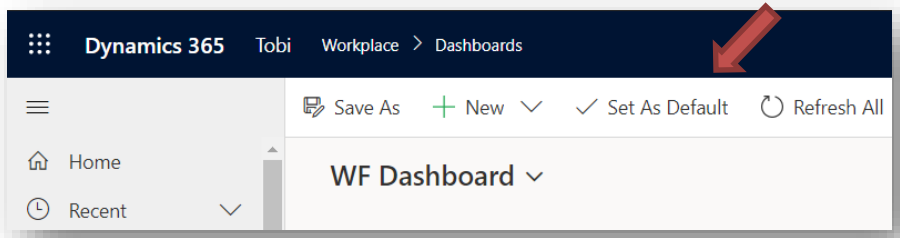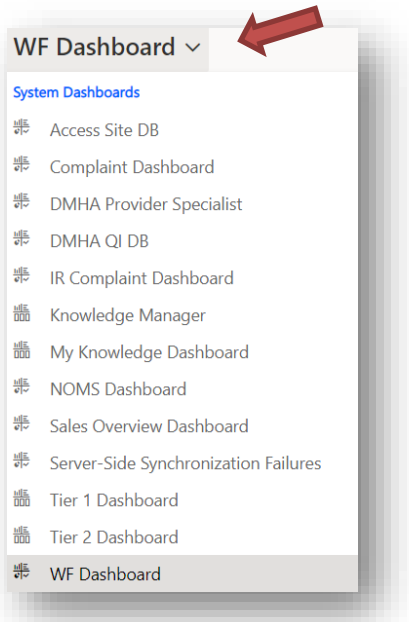
TOBI NAVIGATION

Navigating through Tobi is completed by the menu column on the left side of the screen. To work with a participant you will choose the 'Participant' option.
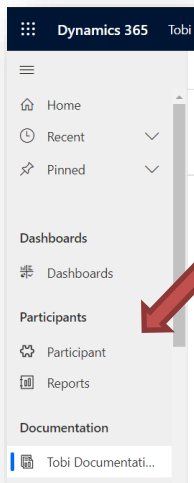

Once a participant is chosen, all work items are listed in tab format under the participant name and ID. The 'Related' tab displays additional information screens not initially listed in the tabs.


SECURE EMAIL

Decisions and requests from state staff will be sent via secure email. Users receive an email from IOT notifying a secure message is ready to be reviewed. Select to 'Read the message'

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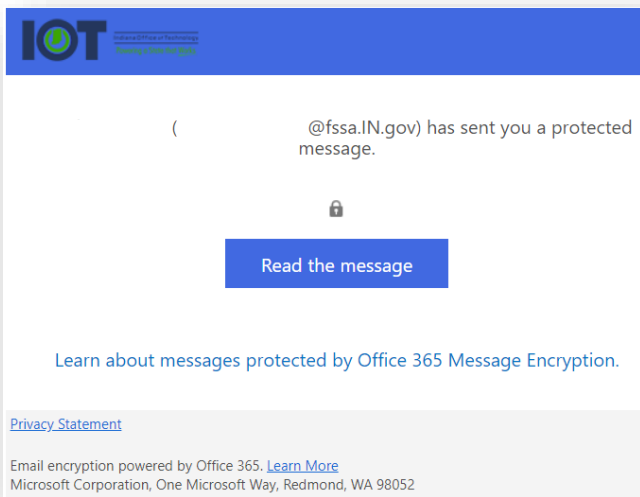
Users are required to sign in to receive this secure information. Choose 'Sign in with a One Time Passcode' to receive a numerical passcode. This passcode is sent to the same email as the original notification email.
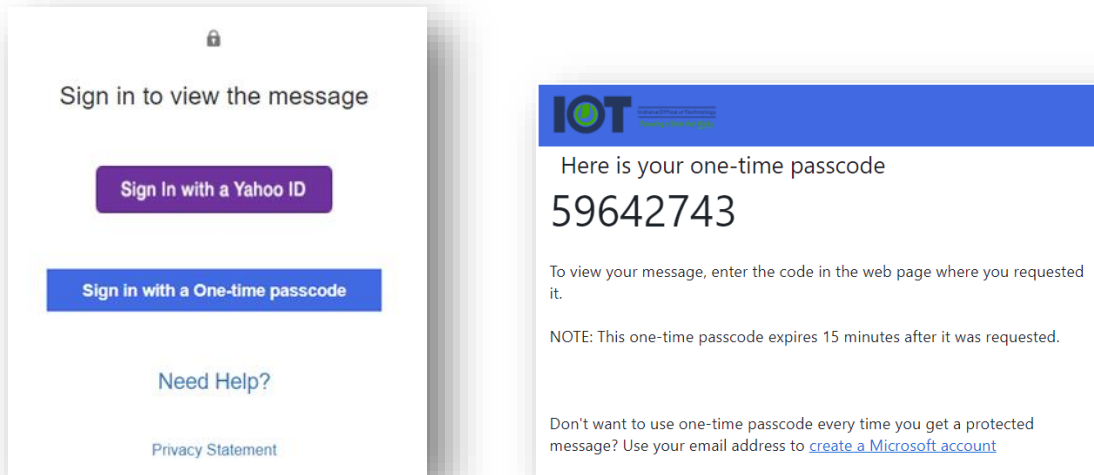
Enter passcode into requested field and select 'Continue' to view the message.
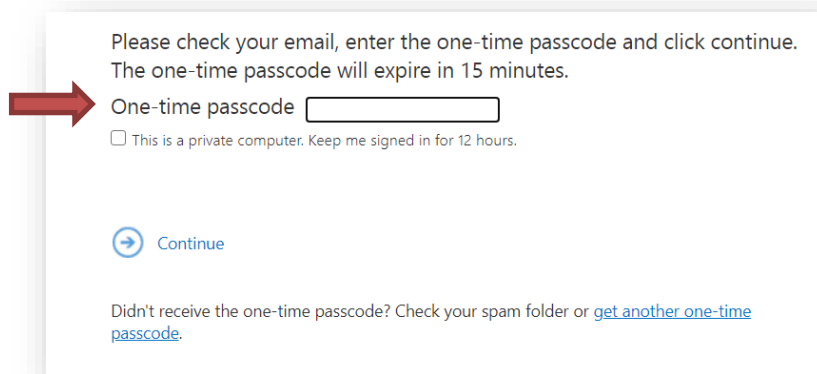
If the code is not entered correctly you will be denied access to the information. Simply wait a couple minutes then go back to original message to request the email be opened.
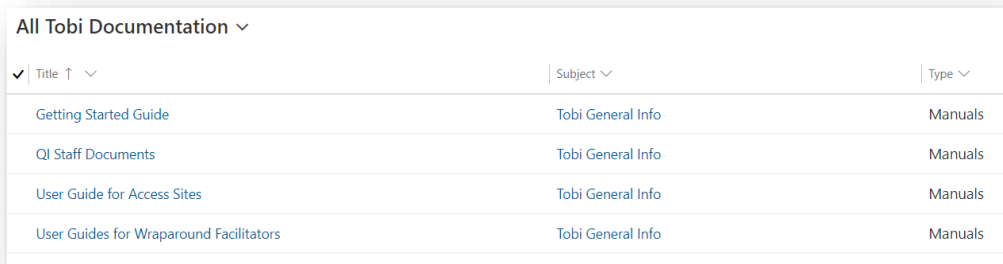
TOBI: GETTING STARTED GUIDE Revised 09/16/2020

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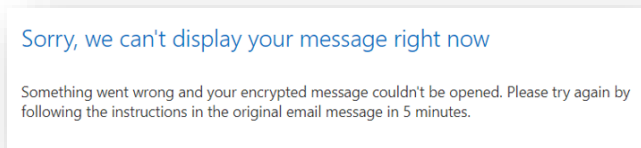
TOBI DOCUMENTATION

Once logged into Tobi, you can reference the various User Guides and Training Videos by going to the 'Documentation' menu item on the left side of the screen. Select Tobi Documentation.
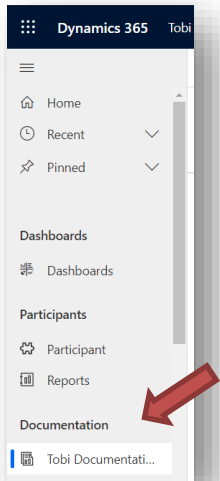
Then click to various topics to access both Users Guides in the form of PDF documents and Training videos.