

# TOBI: GETTING GUIDE FOR WRAPAROUND FACILITATORS & ACCESS SITE USERS

## LOGIN TO TOBI

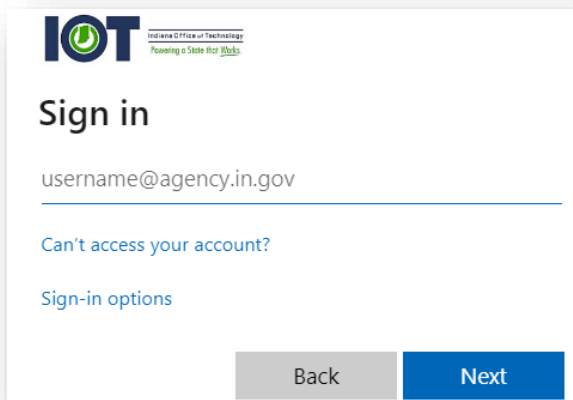
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The URL for Tobi: <https://tobi.crm9.dynamics.com>

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:



**IOT** Indiana Office of Technology  
Powering a State-Rise Works

### Sign in

username@agency.in.gov

[Can't access your account?](#)

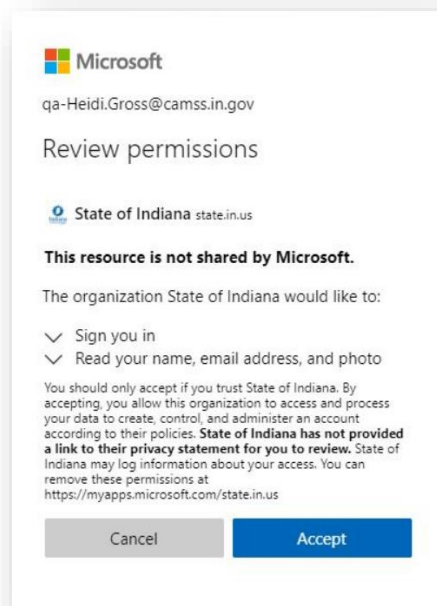
[Sign-in options](#)

Back Next

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.



**Microsoft**

qa-Heidi.Gross@camss.in.gov

### Review permissions

**State of Indiana** state.in.us

**This resource is not shared by Microsoft.**

The organization State of Indiana would like to:

- ✓ Sign you in
- ✓ Read your name, email address, and photo

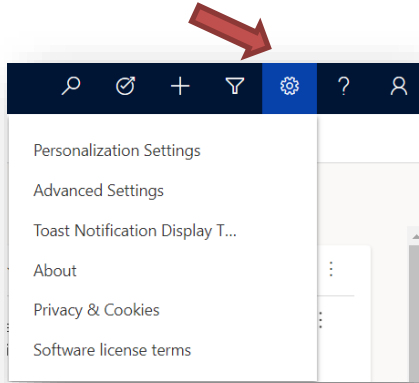
You should only accept if you trust State of Indiana. By accepting, you allow this organization to access and process your data to create, control, and administer an account according to their policies. **State of Indiana has not provided a link to their privacy statement for you to review.** State of Indiana may log information about your access. You can remove these permissions at <https://myapps.microsoft.com/state.in.us>

Cancel Accept

## 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

General Synchronization Activities Formats Email Templates Email Signatures Email Privacy Languages

Select your home page and settings for Get Started panes

Default Pane Workplace Default Tab Dashboards

Set the number of records shown per page in any list of records

Records Per Page 50

Select the default mode in Advanced Find

Advanced Find Mode  Simple  Detailed

Set the time zone you are in

Time Zone (GMT-05:00) Eastern Time (US & Canada)

Select a default currency

Currency US Dollar

On the General tab, starting at the top, set the following:

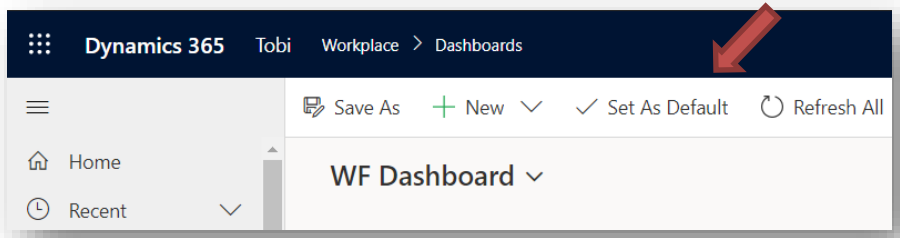
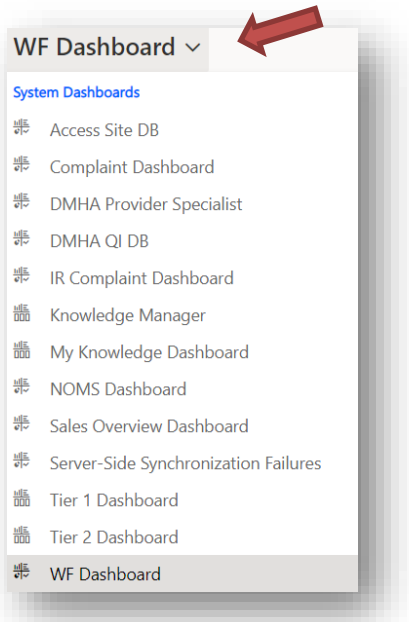
1. Default Pane: Workplace
2. Default Tab: Dashboards
3. Number of records shown: 50
4. Time Zone: Eastern Time
5. Currency: US Dollar

## CHOOSE YOUR DEFAULT DASHBOARD

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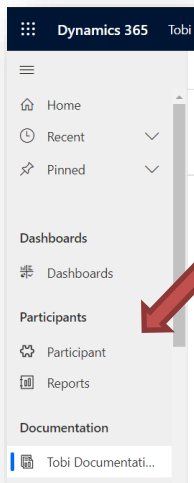
The Microsoft Dynamics CRM Overview is the initial default Dashboard. Click the drop-down to choose another dashboard to be your default.

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



## 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.

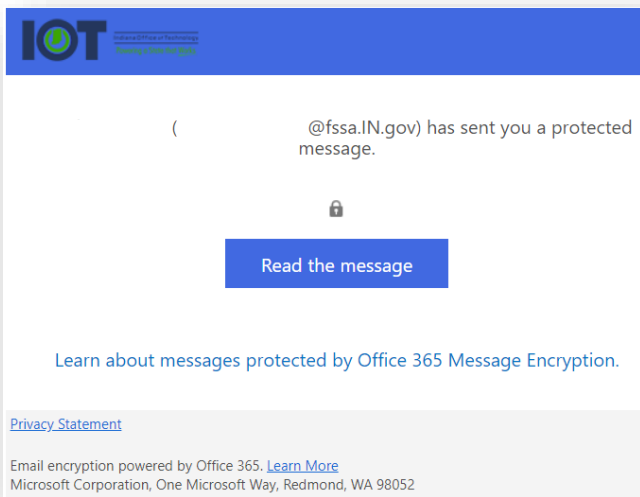


Once a participant is chosen, all work items are listed in tab format under the participant name and ID. The 'Related' tab displays additional information screens not initially listed in the tabs.

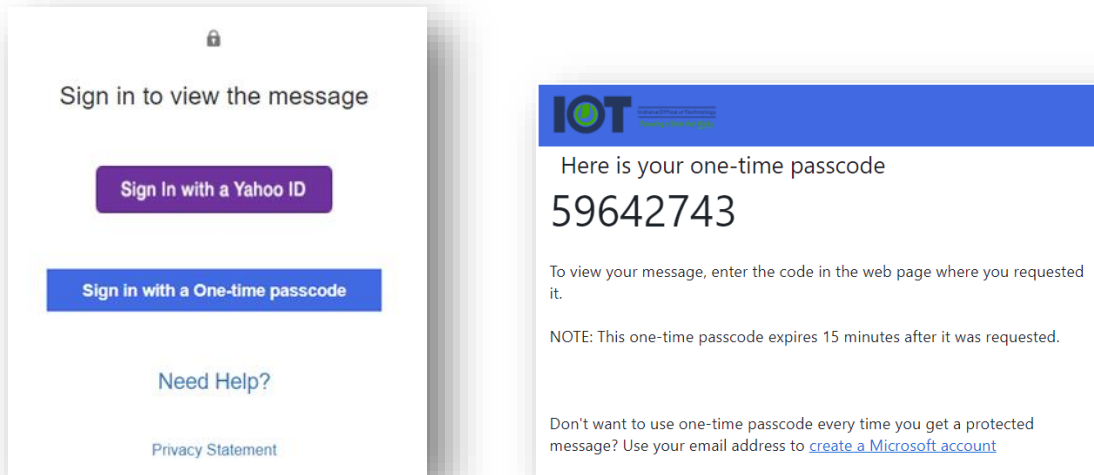


## SECURE EMAIL

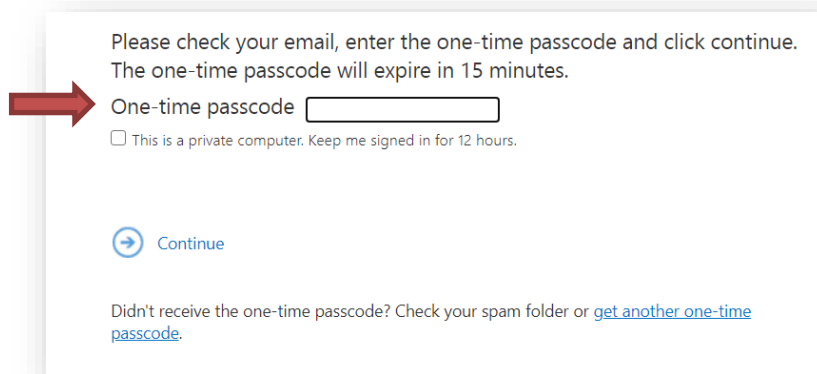
Decisions and requests from state staff will be sent via secure email. Users receive an email from IOT notifying a secure message is ready to be reviewed. Select to 'Read the message'



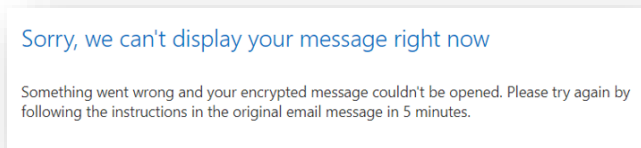
Users are required to sign in to receive this secure information. Choose 'Sign in with a One Time Passcode' to receive a numerical passcode. This passcode is sent to the same email as the original notification email.



Enter passcode into requested field and select 'Continue' to view the message.



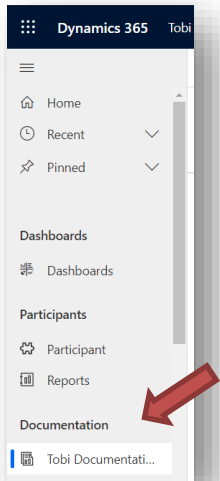
If the code is not entered correctly you will be denied access to the information. Simply wait a couple minutes then go back to original message to request the email be opened.



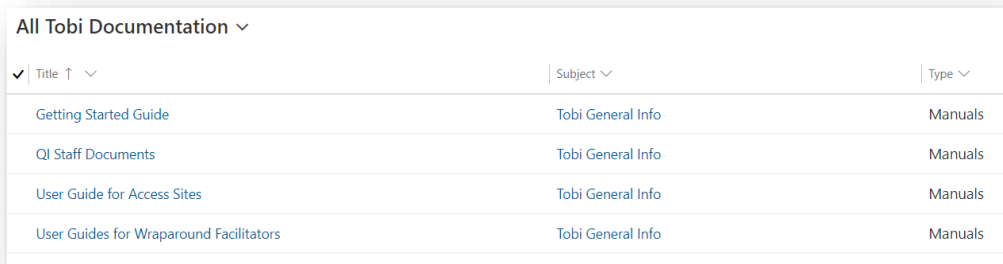
## TOBI DOCUMENTATION

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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.

A screenshot of the 'All Tobi Documentation' table. The table has a header with a dropdown arrow and three columns: 'Title', 'Subject', and 'Type'. The table contains four rows of data, all of which are 'Manuals' type documents under the 'Tobi General Info' subject.

All Tobi Documentation		
Title	Subject	Type
Getting Started Guide	Tobi General Info	Manuals
QI Staff Documents	Tobi General Info	Manuals
User Guide for Access Sites	Tobi General Info	Manuals
User Guides for Wraparound Facilitators	Tobi General Info	Manuals