User Guide: Child Care Portal Delegated Administration Feature

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## **1.0 Delegated Administration Feature**

The intent of the Delegated Administration feature is to enable users that have been identified and assigned Child Care Portal Admin privileges the ability to create, modify (roles and details), and disable users; as well as grant administrative privileges to other users. A delegated administrator is a user who is granted admin-level privileges in order to carry out these functions. Child Care Portal Admins are considered delegated administrators.

### 2.0 New User Welcome Email

When a new user is created, this user will receive an email from <u>support@calsaws.org</u> informing the user that "Your CalSAWS account has been created". To activate the new user's account, the user must check their email to retrieve a unique link for password reset. Please follow the instructions provided in this email to reset your password. The new user will become active in the CalSAWS system once their password is reset.

\*For Non-LA County users only

# 3.0 Child Care Portal Administrator Capabilities

#### **Child Care Portal Administrators Can:**

#### **Create New Users**

Add an individual with no previous CalSAWS ID to the CalSAWS system; creating a new account

### **Edit Users**

Modify the details for an existing user within the CalSAWS system

### **Assign Access**

Assign a CalSAWS user a defined role or group membership that provides a certain level of system access based on the parameters of the role

### **Disable Users**

Disable an existing user within the CalSAWS system; the user is not permanently removed

### **Revoke Access**

Disable CalSAWS system access or defined privileges for a designated user. *This function is used in cases where an employee leaves the company, changes roles/departments, etc.* 

### **Assign Administrator Roles**

Assign administrator privileges to another user. Administrator privileges include the ability to manage other users, assign roles, and revoke access

### **Revoke Administrator Roles**

Disable a user's administrator privileges

## 4.0 Create New Users

CalSAWS Child Care Portal Admins can add an individual in their county and, or state-wide individuals with no previous CalSAWS ID to the CalSAWS system using the steps below:

1. Navigate to the Child Care Administrator Portal homepage and navigate to the User tab



### 2. Select Add New User (+ New User)

<b>{</b>	ForgeRock				Help &	Support	Docs	0	ForgeRock helpdesk admin
	Dashboard								
0	Profile	User							
6	Internal role	ForgeRock-hosted identity	resources						
6	Role	+ New User				Q	Search		
00	User	Username	\$	First Name	\$ Last Name		nail Addres	S	÷

3. Enter the new user's information and click Save

New User	×	не
First Name New		I
Last Name Tester		
Username admin1Statewide@test.com		
Email Address admin1Statewide@test.com		m
County 15		
	Cancel Save	con

4. The new user will now populate in the list of Child Care Portal users

<b>{</b>	ForgeRock						He	lp & Support	Docs	0	ForgeRock helpdesk admin	•
88	Dashboard											
0	Profile	User										
Ē	Internal role	ForgeRock-hosted identity resource	25									
	Role	+ New User						Q Sea	rch			
36	User			First Marrie		Less Norma		E				
		Username	Ŧ	First Name	Ŧ	Last Name	Ŷ	Email Addres	is		Ŷ	
		admin1Statewide@test.com		New		Tester		admin1State	wide@test.c	:om	1	
		AdminReport@test.com		Reports		Testing		AdminReport	@test.com		1	

5. To activate the new user's account, the user must check their email to retrieve a unique link for password reset. The new user will become active in the CalSAWS system once their password is reset.

## 5.0 Assign Access

1. Navigate to the User tab from the Child Care Administrator Portal homepage and click on the user who you'd like to assign access to

NorgeRock			Help 8	Support Docs	ForgeRock helpdesk admin
Dashboard					
Profile	User				
Internal role	ForgeRock-hosted identity resources				
Role	+ New User			Q Search	
at User					
	Username 👳	First Name	Last Name	Email Address	
	admin1Statewide@test.com	New	Tester	admin1Statewide@te	est.com
	AdminReport@test.com	Reports	Testing	AdminReport@test.c	om
	adminStatewide@test.com	test5	admin	adminStatewide@tes	st.com

2. Once the user is selected, navigate to the Provisioning Roles tab. Select Add Provisioning Roles (+ Provisioning Roles) to add access

← User List		Help & Support	Docs	n	ForgeRock helpdesk admin	~
User Ne administ	W Tester					
Details	+ Add Provisioning Roles					
Preferences	Provisioning Role	Time Constra	aint			
Provisioning Roles		There are no records to show				
Direct Reports		inere are no records to show				

3. Begin typing in the role that you'd like to add the user to; all available roles will populate. Select your role of choice and click Save

Provisioning Roles child	~
Child Care Portal User	
ssign role only during a selected time period.	
	Cancel Save

4. The user's new role will now populate in the Provisioning Role list.

← User List		Help & Support	Docs	ForgeRock helpdesk admin
User N admin	ew Tester			
Details	+ Add Provisioning Roles			
Preferences	Provisioning Role	Tin	ne Constraint	
Provisioning Roles	Child Care Portal User			
Direct Reports				

### 6.0 Revoke Access

Revoking access is the ability to remove a user's access to CalSAWS applications that the user has defined privileges to. Users are revoked in cases where the user leaves the company, changes roles/departments, etc.

1. From the Child Care Portal dashboard navigate to the Role tab



2. All roles that the user has been assigned (or applications which the user has privileges to) will populate. Select the role(s) you wish to revoke by clicking on the pencil next to the role's name.

		Q Search
Name	Description	÷
Child Care Portal User-dev	The "Child Care Portal User" security role will allow users to	o access and use the Child Care Portal.
	14 4 >	

3. Navigate to Role Members tab and select the user you wish to revoke by checking the check box next to the user's name. Then click remove

Role Chil The "Child	d Care Portal User" security role will allow user	SET-dev s to access and use the Child Care Portal.
Details	+ Add Role Members Remove	
Role Members	Role Member	Time Constraint
Raw JSON	BaretskyW William Baretsky	
	childcare-system-user-st1 Sandra Hamilton-Smith	
	Childcare-system-user-st2 David Hamilton-Smith	November 12, 2020 2:33 PM to November 12, 2020 7:33 PM

4. You will confirm the removal of this user from the role by clicking Remove



5. The user designated for revocation will no longer appear in the list of Role Members



#### 7.0 Edit New Users

Eligible fields for modification include: first name, last name, staff type, county, status, and manager

1. To modify an existing user, navigate to the user tab and select the pencil next to the user you wish to edit

<b>()</b> I	orgeRock				Help & Support Docs 🕠	ForgeRock helpdesk admin
	Dashboard					
9	Profile	User				
•	nternal role	ForgeRock-hosted identity resource	25			
	Role	+ New User			Q Search	
2	User					
		Username	First Name	Last Name	Email Address	\$
		admin1Statewide@test.com	New	Tester	admin1Statewide@test.com	- z 🗲
		AdminReport@test.com	Reports	Testing	AdminReport@test.com	1

2. Modify the details for an existing user within the CalSAWS system, then click save

User	
S S Ne	ew Tester
admin1St	catewide@test.com
Reset Password	
Details	Username admint Statewide@tast com
Preferences	domini Jucendegeateon
Provisioning Roles	First Name New
Direct Reports	Tare Nama
Raw JSON	Tester
	Email Address
	admin1Statewide@test.com
	User Type Staff
	County 00
	Status
	active
	Manager
	Save

\*Eligible fields for modification include: first name, last name, staff type, county, status, and manager

### 8.0 Disable Users

To disable an existing CalSAWS user you will need to edit the user's status from Active to Inactive outlined in the steps below.

1. From the dashboard navigate to the User tab



2. Click on the user who you'd like to disable



3. Modify the user's status from Active to Inactive and click save to confirm the modification

	1		
Reset Password	J		
Details	Username		
Preferences	admin1Statewide@test.com		
Provisioning Roles	First Name New		
Direct Reports	Last Name Tester		
Raw JSON	Email Address admin1Statewide@test.com		
	User Type Staff		
	County 00		
	Status Ina		
	inactive		

### 9.0 Assign Administrator Role

A Child Care Portal Administrator has the privilege to add other users to the Child Care Portal as Administrators.

1. To add an Administrator, navigate to the Internal Role tab

KorgeRock			н	lelp & Support	Docs	0	ForgeRock helpdesk admin	1~
Dashboard								
Profile	Internal Rol	le						
internal role	ForgeRock-hosted identity resource	ces						
😰 Role				0	Search			
🚉 User				~	Jearen			
	Name	\$	Description			4	·	í.
	Child Care Portal Admin		Child Care Provider Portal Adm	inistrator			1	
			1¢ 4 >					

2. Click on the pencil next to the user's name that you wish to make a new Child Care Portal Administrator

ForgeRock		Hel	lp & Support Docs	forgeRock helpdesk admin
Dashboard  Profile	Internal Role	5		
Internal role	ForgeRock-hosted identity resources	5		
Role			Q Search	
🚨 User	Name	Description		¢
	Child Care Portal Admin	Child Care Provider Portal Admini	listrator	/ 😓
		16 G >		

3. Navigate to Members tab and select Add Members (+ Add Members)



4. Begin typing the name of the user(s) you'd like to add. Only users in your designated county and state-wide users will populate. You can add more than one user.

4	Add Members	×
	Members test	•
	admin1Statewide@test.com New Tester	
	AdminReport@test.com Reports Testing	
	adminStatewide@test.com test5_admin	1.
1	AutoTest@test.com automation Testing	
	caseworker1Statewide@test.com New Tester	

5. Click on your user(s) of choice once the user's name populates then click Save

Add Members	×
Members	
New Tester × admin1Statewide@test.com	
Authorization Role Members	
	Cancel

6. The user(s) will now show up in the list of Child Care Portal Admins

Child of	al Role nild Care Portal Admin Gare Provider Portal Administrator
Details	+ Add Members
Members	Member
Raw JSON	helpdeskAdmin helpdesk admin
	admin1Statewide@test.com New Tester

# **10.0** Revoke Administrator Role

A Child Care Portal Administrator has the privilege to revoke the rights of other Administrators.

1. To revoke an Administrator, navigate to the Internal Role tab

KorgeRock				Help & Support	Docs	0	ForgeRock helpdesk adm	iin Č
<ul> <li>Bashboard</li> <li>Profile</li> <li>Internal role</li> </ul>	Internal Rol	e						
Role				Q	Search			
2. User	Name	¢	Description			\$		
	Child Care Portal Admin		Child Care Provider Porta	al Administrator			1	v
			14 A D					

2. Click on the pencil next to Child Care Portal Admin that you'd like to select

	ForgeRock			Help & Support Docs	ForgeRock helpdesk admin
00	Dashboard				
0	Profile	Internal Role			
â	Internal role	ForgeRock-hosted identity resources			
囱	Role			Q Search	
2	User				
		Name	Description		÷
		Child Care Portal Admin	Child Care Provider	Portal Administrator	/
			16 6	5	

3. Navigate to the Members tab and check the box next to the name of the Administrator whose access you wish to revoke

Ch Child C	nal Role Nild Care Portal Admin Care Provider Portal Administrator
Details	+ Add Members Remove
Members	Member
	helpdeskAdmin helpdesk admin
	admin1Statewide@test.com New Tester

4. Confirm the revocation of Administrator access for this user by clicking Remove

← Internal Role	C Confirm Removal	apport	Docs	n Fo
Details	Are you sure you want to remove the selected Privilege? Members?			
Members Raw JSON	Cancel			
	admin1Statewide@test.com New Tester			
	helpdeskadminanduser helpdeskadminanduser adminanduser			

5. This user no longer shows up in the Member list of Child Care Portal Admins

← Internal Role	List		Help & Support	Docs	n	ForgeRock helpdesk admin	*
Child C	Care Pro	vider Portal Administrator					
Details		+ Add Members					
Members		Member					
		helpdeskAdmin helpdesk admin					
		helpdeskadminanduser helpdeskadminanduser adminanduser					

## **11.0** More Information

For information on navigating the Child Care Administrator Portal please watch the Child Care Administrator Portal Overview video found <u>here</u>.