

User Guide: 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 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. This guide will walk you through how to navigate this feature, using images from the Child Care Provider Portal as an example.

2.0 New User Welcome Email

When a new user is created, this user will receive an email from support@calsaws.org 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 Delegated Administration Portal Link

To access the Delegated Administration Portal please use the following link:



4.0 Delegated Administrator Capabilities

Delegated 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 [CalSAWS Help Desk Only]

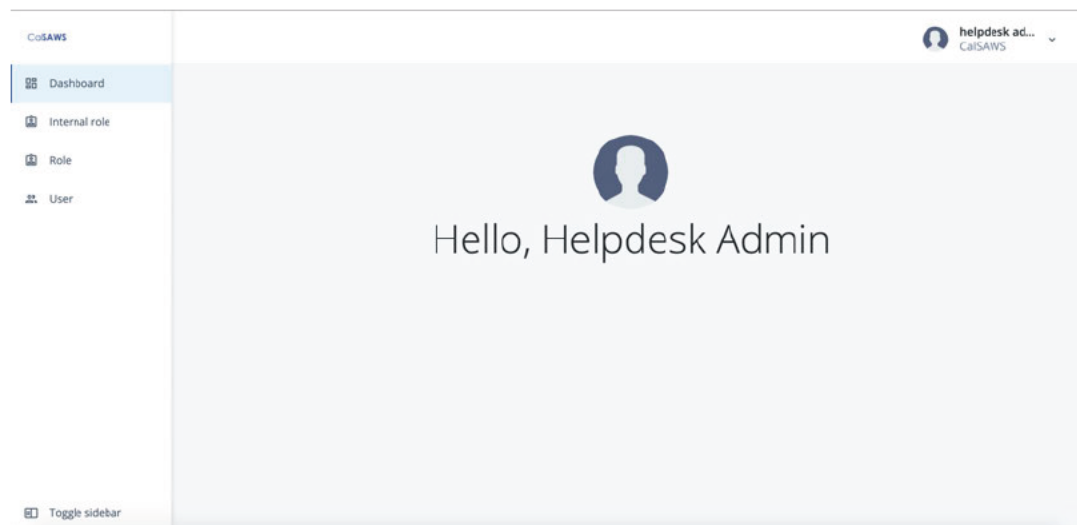
Revoke Administrator Roles

Disable a user's administrator privileges

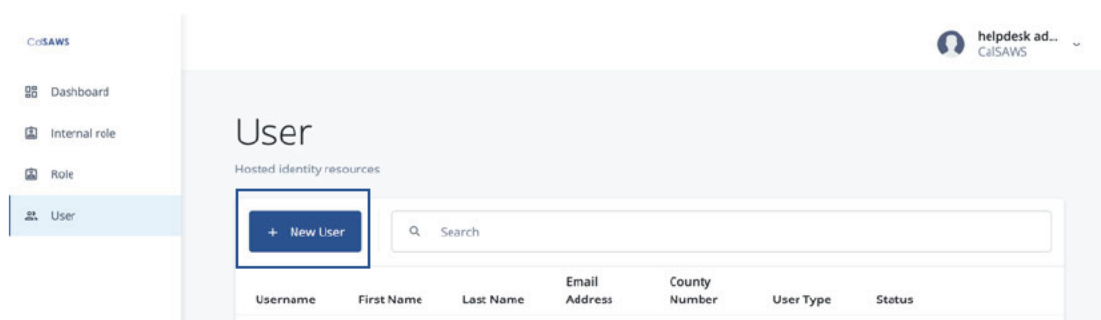
5.0 Create New Users

CalSAWS Delegated 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:

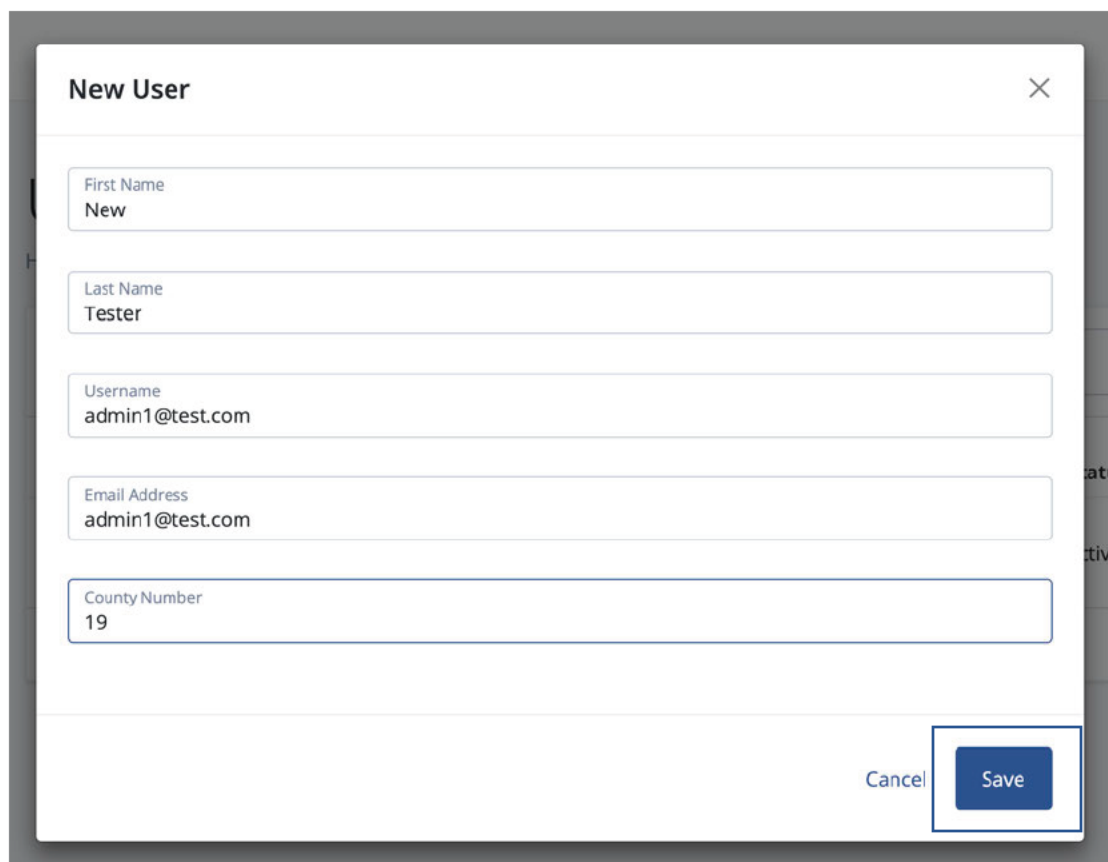
1. Navigate to your application's homepage (Qlik, Child Care Provider Portal, OCAT, etc.) and navigate to the User tab



2. Select Add New User (+ New User)



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

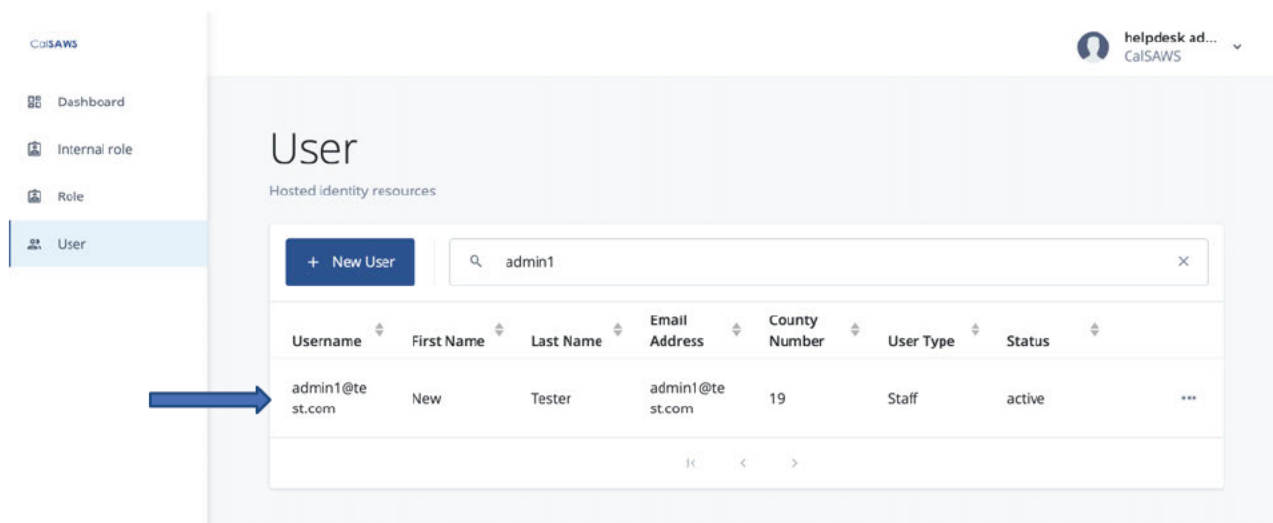


The image shows a 'New User' form with the following fields and values:

- First Name: New
- Last Name: Tester
- Username: admin1@test.com
- Email Address: admin1@test.com
- County Number: 19

At the bottom right, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a blue border.

- The new user will now populate in the list of your application's users



The image shows the 'User' management interface. A blue arrow points to the first row of the user list, which corresponds to the user created in the previous step.

Username	First Name	Last Name	Email Address	County Number	User Type	Status	
admin1@test.com	New	Tester	admin1@test.com	19	Staff	active	...

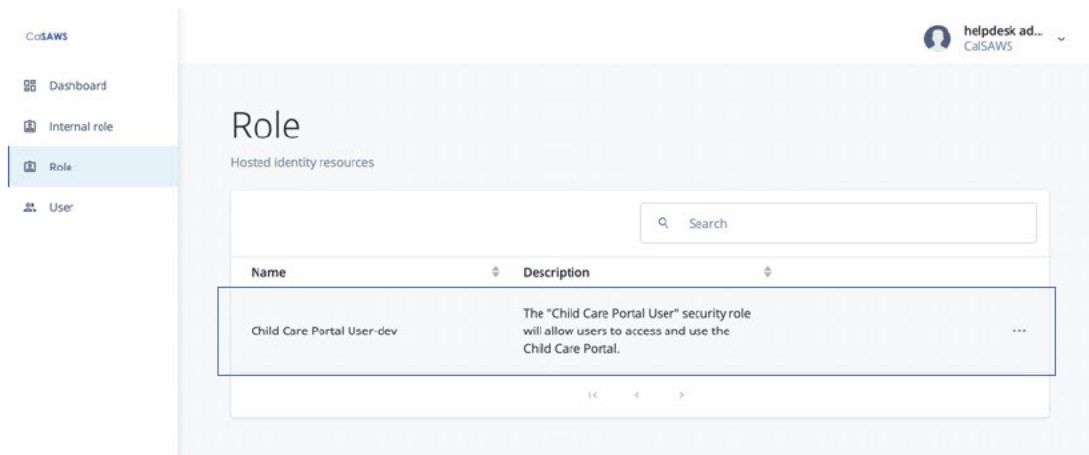
- To activate the new user's account, the user must check their email to retrieve a unique link for password reset. The new user will become active in the CalSAWS system once their password is reset.

6.0 Assign Access

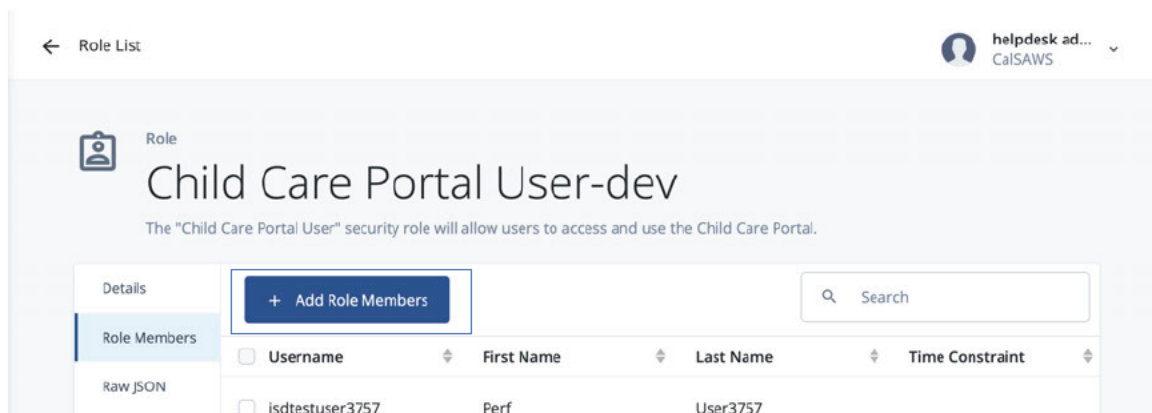
CalSAWS – California Statewide Automated Welfare System

Assigning access is the ability to grant a user access to CalSAWS applications that the user has defined privileges to. The only roles available for this functionality are Child Care Portal User, CBO Manager, CBO Assistor, and BenefitsCal Admin.

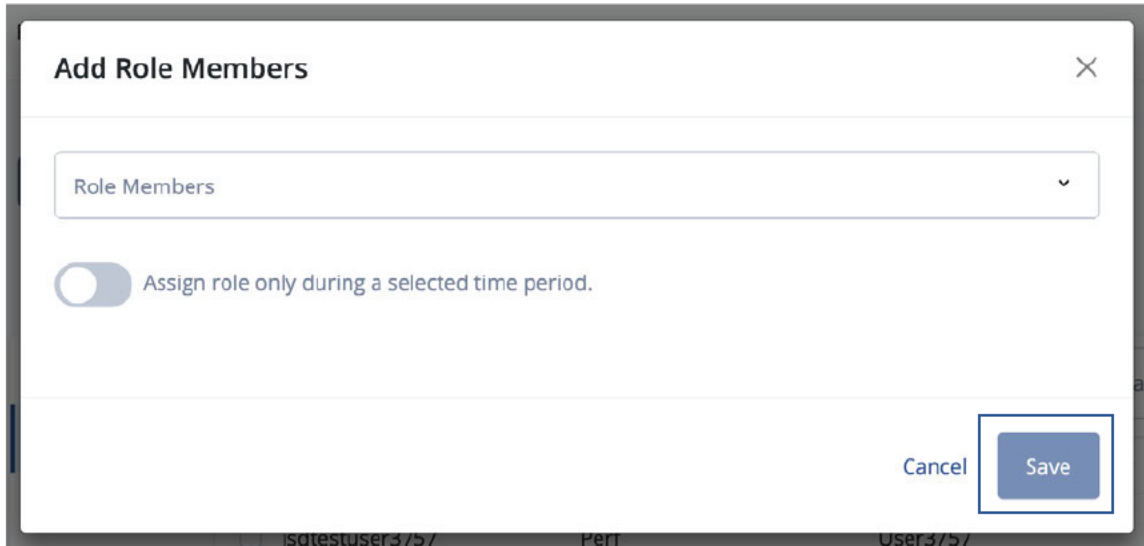
1. Navigate to the Role tab from your application's homepage and click on the Role you'd like to assign access to (the only roles available for this functionality are Child Care Portal User, CBO Manager, CBO Assistor, and BenefitsCal Admin)



2. Once the role is selected, navigate to the Role Members tab. Select Add Role Members (+ Add Role Members) to add access

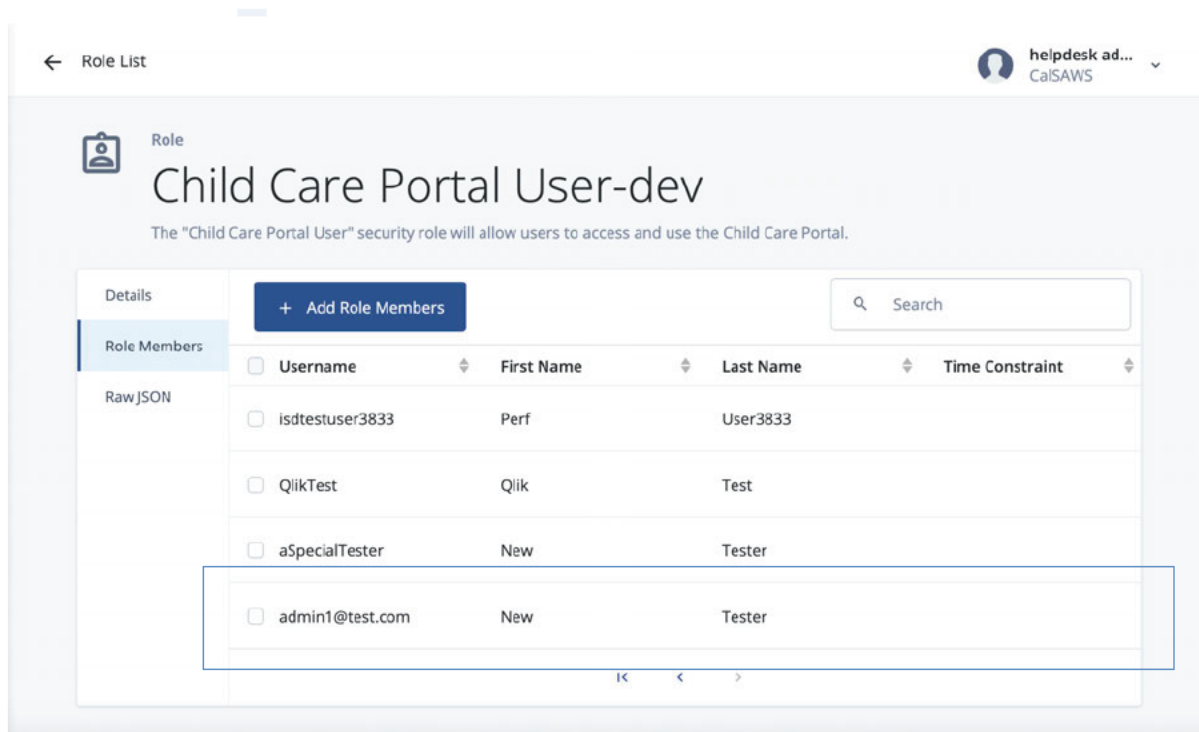


3. Begin typing in the username or email of the user that you'd like to add; all available users will populate. Select the user and click Save



The 'Add Role Members' dialog box is shown. It has a title bar with a close button (X). Below the title bar is a search input field labeled 'Role Members'. Below the search field is a toggle switch labeled 'Assign role only during a selected time period.' At the bottom right of the dialog are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a blue border.

4. The new user will now populate in the Role Members list



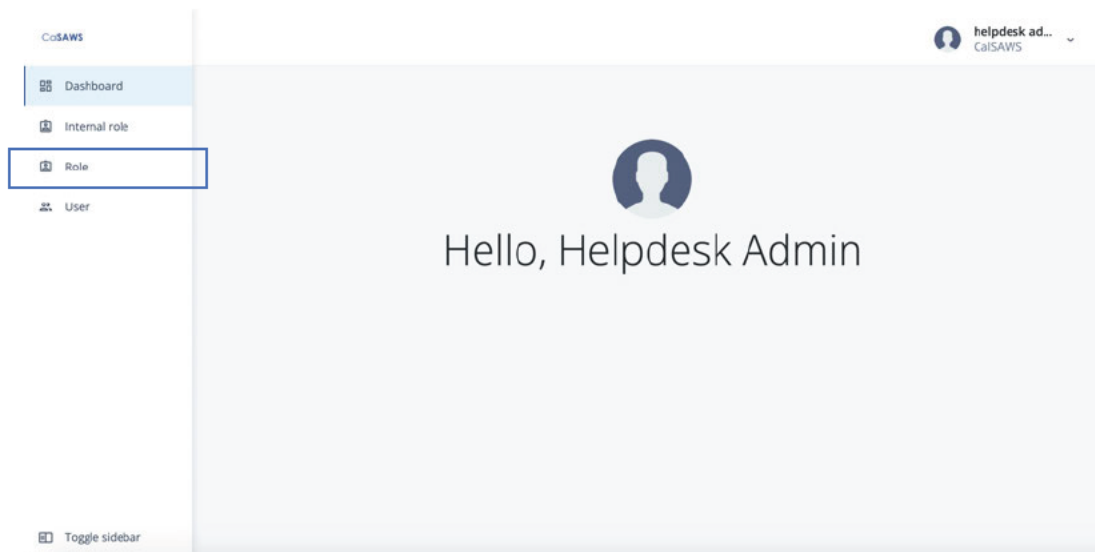
The 'Role List' page is shown. The breadcrumb is 'Role List'. The user is 'helpdesk ad... CalSAWS'. The role is 'Child Care Portal User-dev'. The description is 'The "Child Care Portal User" security role will allow users to access and use the Child Care Portal.' The 'Role Members' tab is selected. The 'Add Role Members' button is visible. The table shows the following data:

Username	First Name	Last Name	Time Constraint
<input type="checkbox"/> Isdtestuser3833	Perf	User3833	
<input type="checkbox"/> QlikTest	Qlik	Test	
<input type="checkbox"/> aSpecialTester	New	Tester	
<input type="checkbox"/> admin1@test.com	New	Tester	

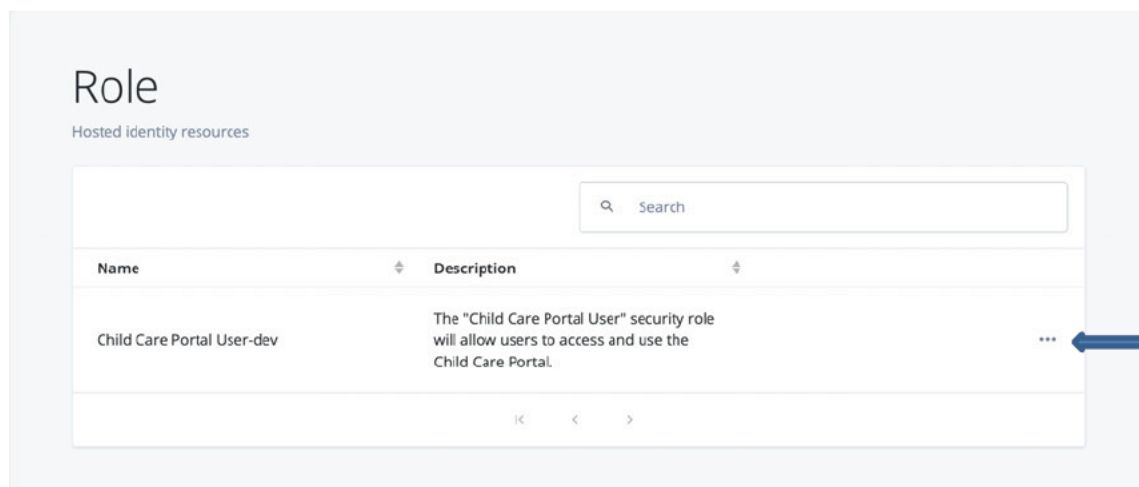
7.0 Revoke Access

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. The only roles available for this functionality are Child Care Portal User, CBO Manager, CBO Assistor, and BenefitsCal Admin.

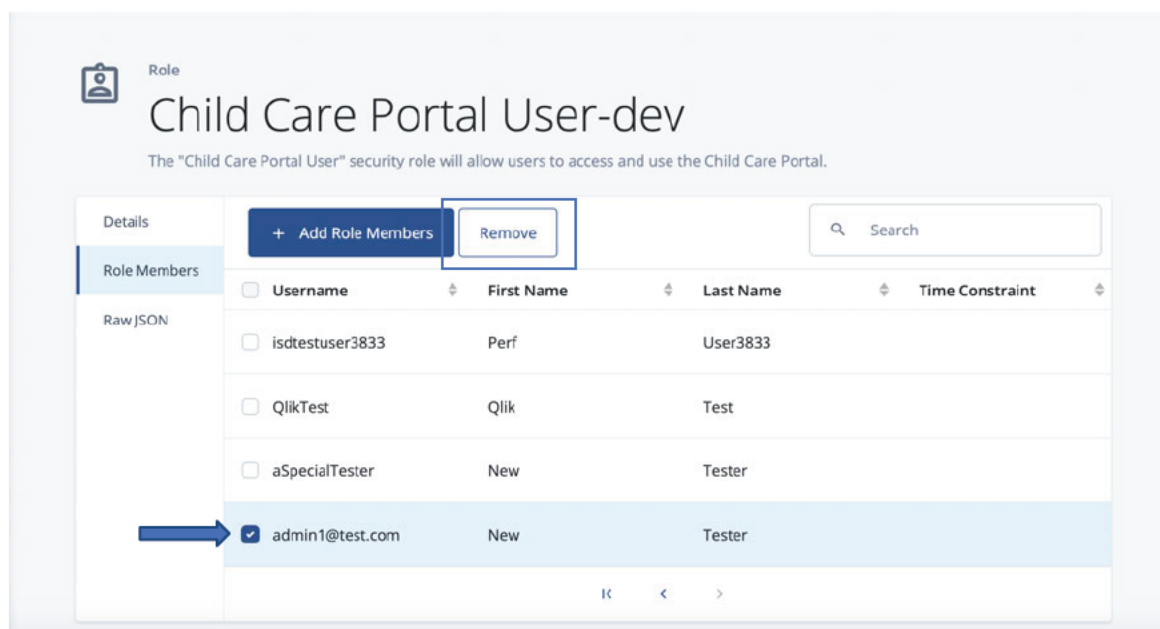
1. From your application's dashboard navigate to the Role tab



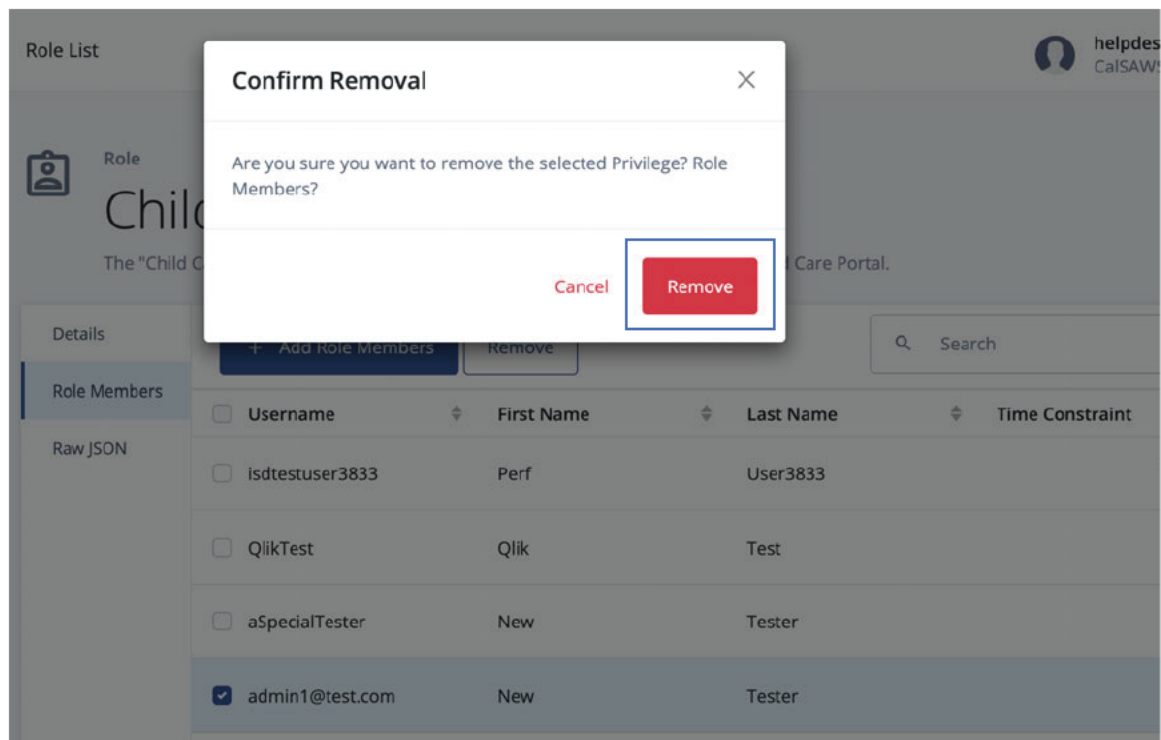
2. All roles that you have privilege to view will populate. Select the role(s) you wish to revoke.



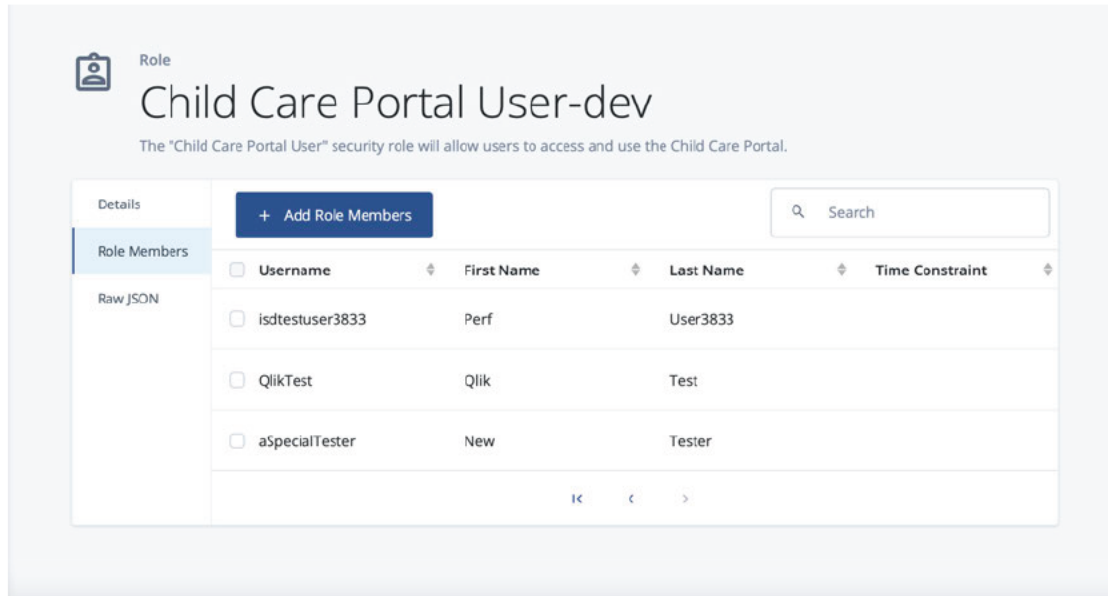
3. Navigate to Role Members tab and select the user you wish to revoke by checking the check box next to the user's name. Then click remove



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



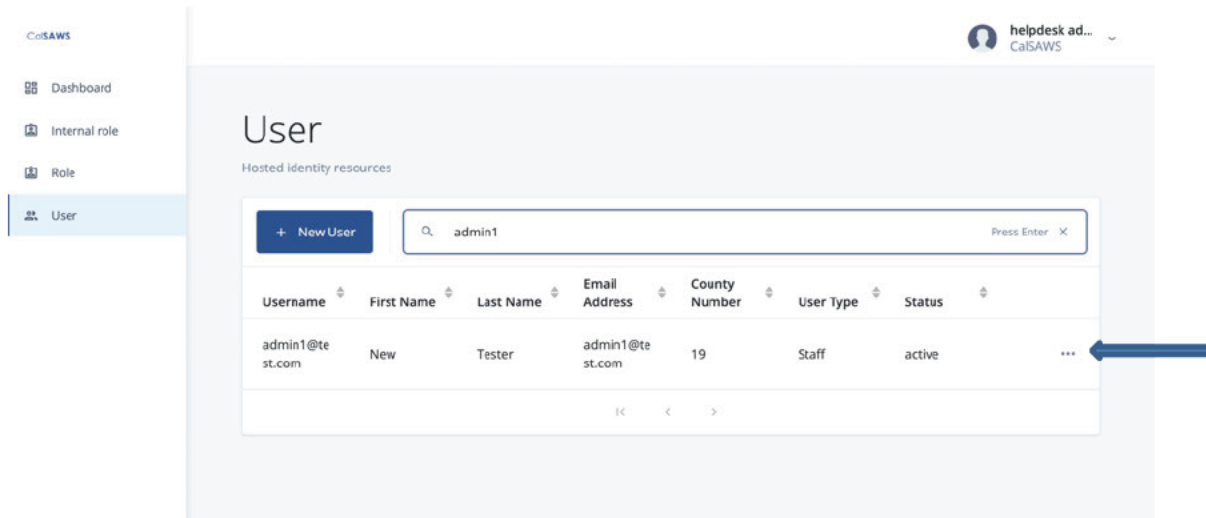
5. The user designated for revocation will no longer appear in the list of Role Members



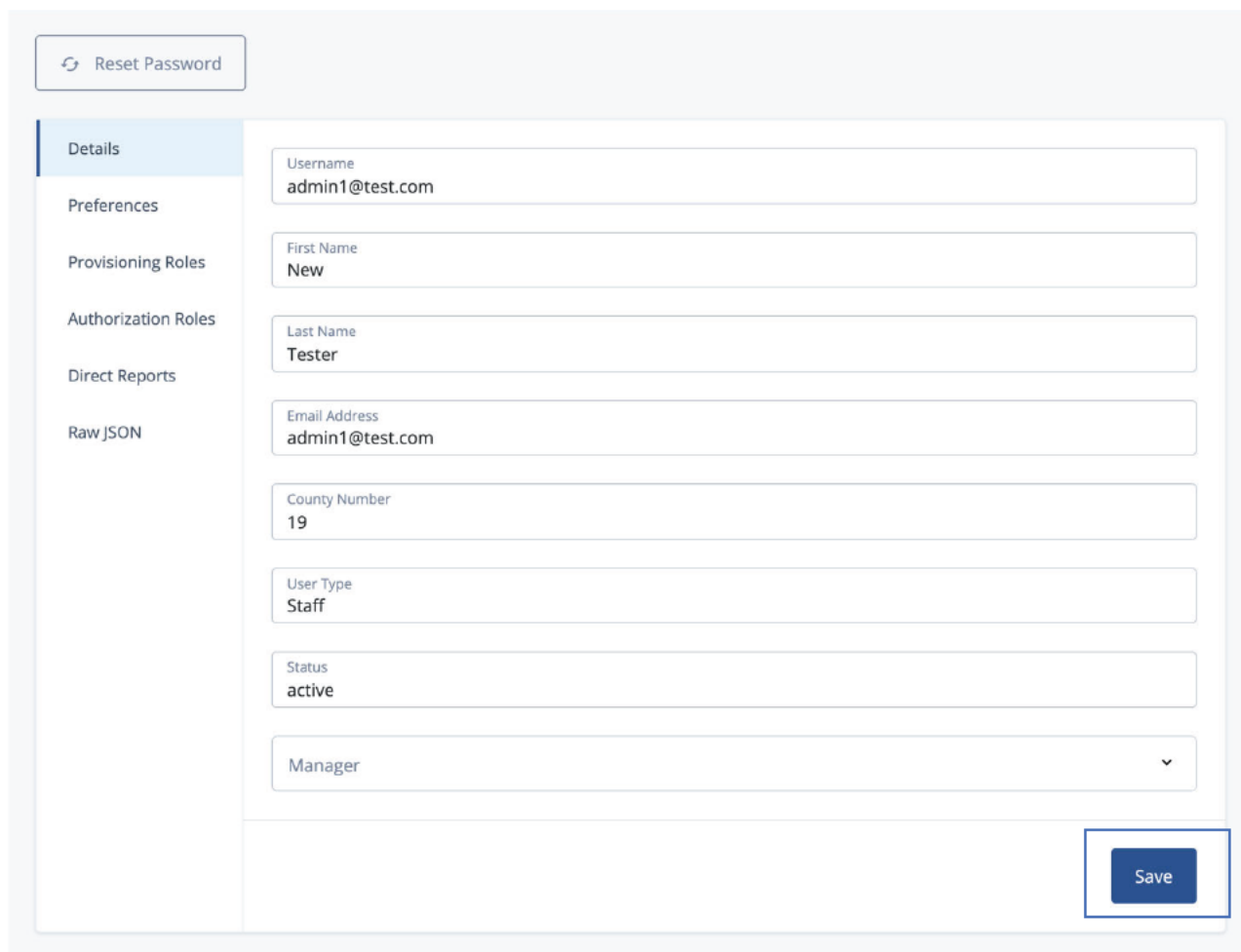
8.0 Edit New Users

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 user you wish to edit



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



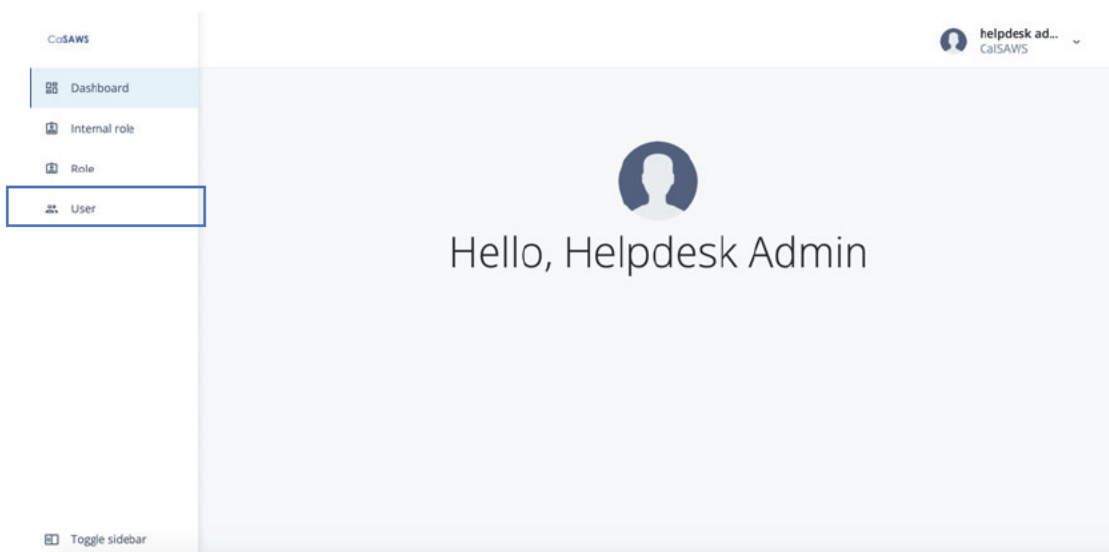
The screenshot shows a web interface for managing users. At the top left is a 'Reset Password' button with a circular arrow icon. Below it is a sidebar menu with the following items: 'Details' (highlighted with a blue bar), 'Preferences', 'Provisioning Roles', 'Authorization Roles', 'Direct Reports', and 'Raw JSON'. The main content area contains several input fields: 'Username' with the value 'admin1@test.com', 'First Name' with 'New', 'Last Name' with 'Tester', 'Email Address' with 'admin1@test.com', 'County Number' with '19', 'User Type' with 'Staff', 'Status' with 'active', and a 'Manager' dropdown menu. A blue 'Save' button is located at the bottom right of the form.

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

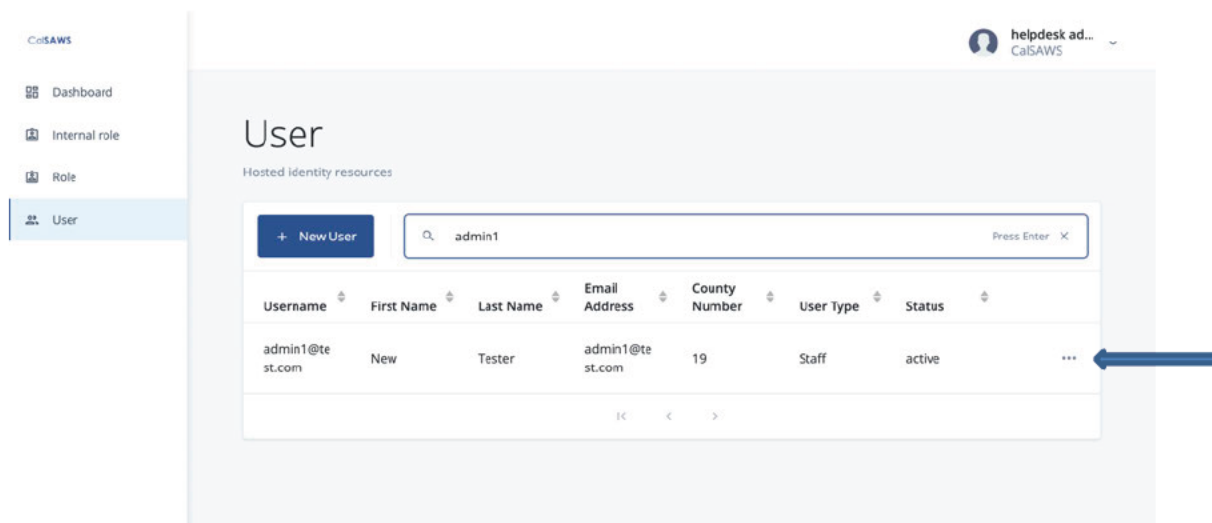
9.0 Enable Users

To enable an existing CalSAWS user you will need to edit the user's status from Expired or Inactive to Active outlined in the steps below. Once a user is enabled, that user will be prompted to perform a password reset. To activate the 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. Users can also reset their passwords by navigating directly to

1. From the dashboard navigate to the User tab



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



3. Modify the user's status from Expired or Inactive to Active and click save to confirm the modification (type active in the status bar)

Reset Password

Details

Preferences

Provisioning Roles

Authorization Roles

Direct Reports

Raw JSON

Username

admin1@test.com

First Name

New

Last Name

Tester

Email Address

admin1@test.com

County Number

19

User Type

Staff

Status

expired

Manager

Save

Reset Password

Details

Preferences

Provisioning Roles

Authorization Roles

Direct Reports

Raw JSON

Username

admin1@test.com

First Name

New

Last Name

Tester

Email Address

admin1@test.com

County Number

19

User Type

Staff

Status

active

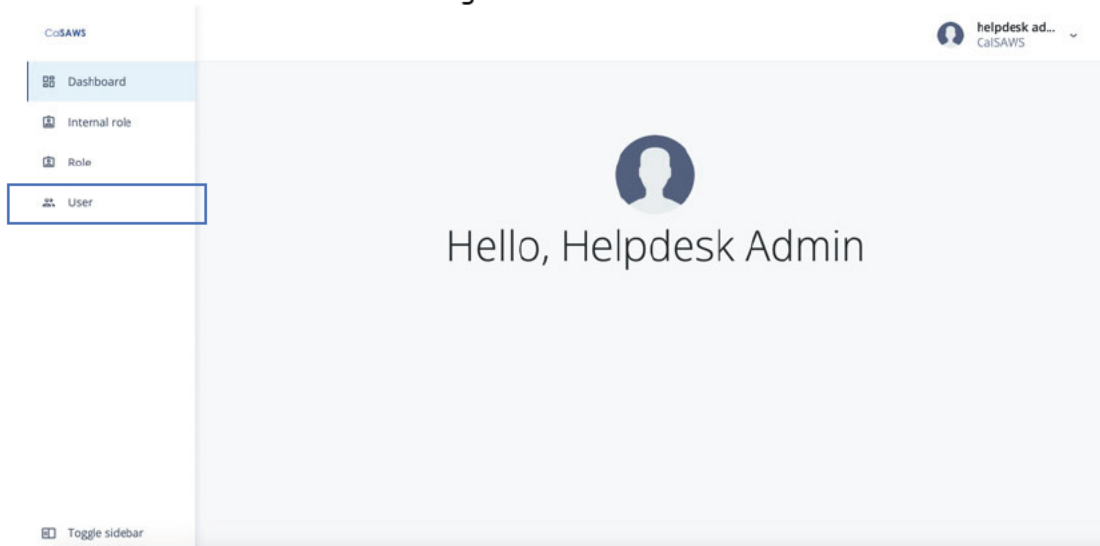
Manager

Save

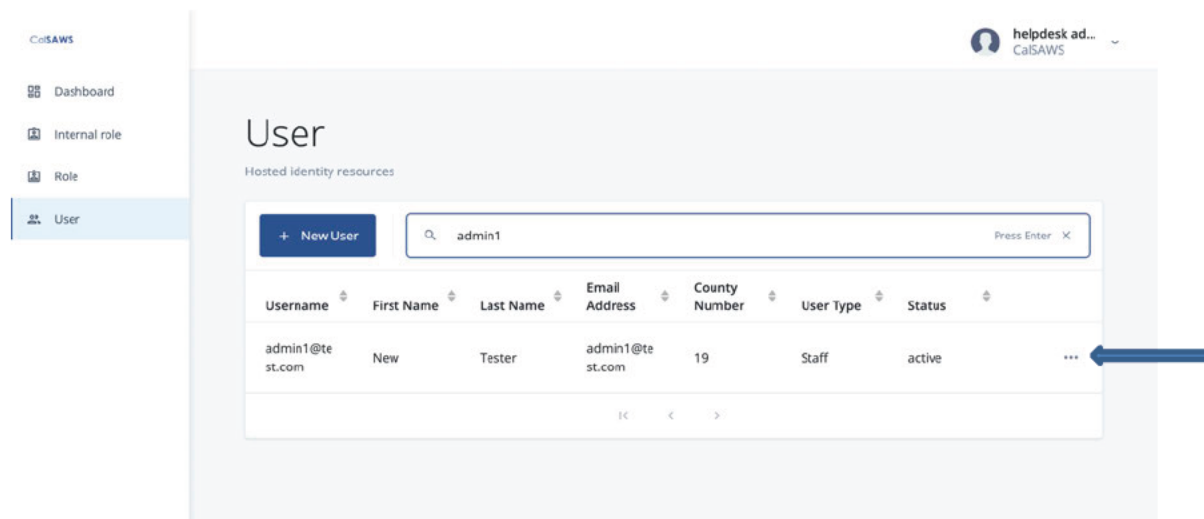
10.0 Steps to Disable a User

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 by typing inactive in the status bar and click save to confirm the modification

Reset Password

Details

Username
admin1@test.com

First Name
New

Last Name
Tester

Email Address
admin1@test.com

County Number
19

User Type
Staff

Status
inactive

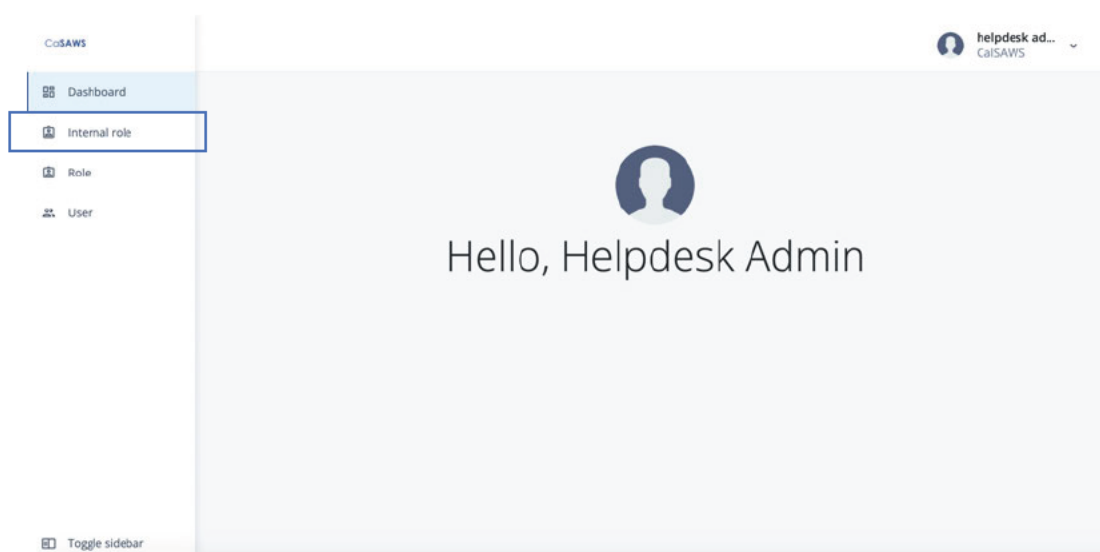
Manager

Save

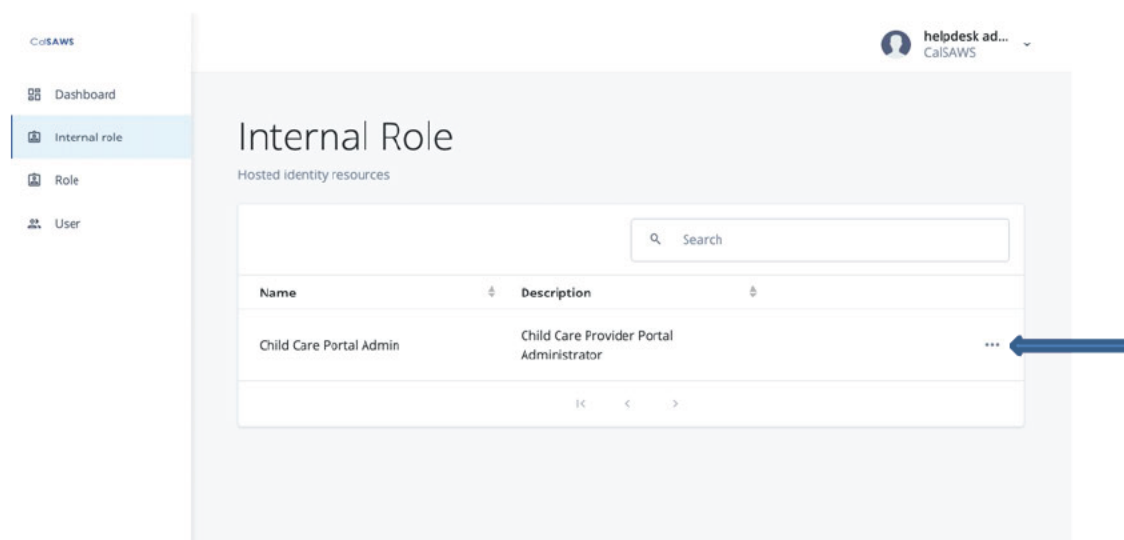
11.0 Assign Administrator Role (County Help Desk/ Consortium Administrators Only)

County Help Desk Administrators and Consortium Administrators have the privilege to add other users to their designated application (OCAT, Qlik, Child Care Provider Portal, etc.) as Administrators

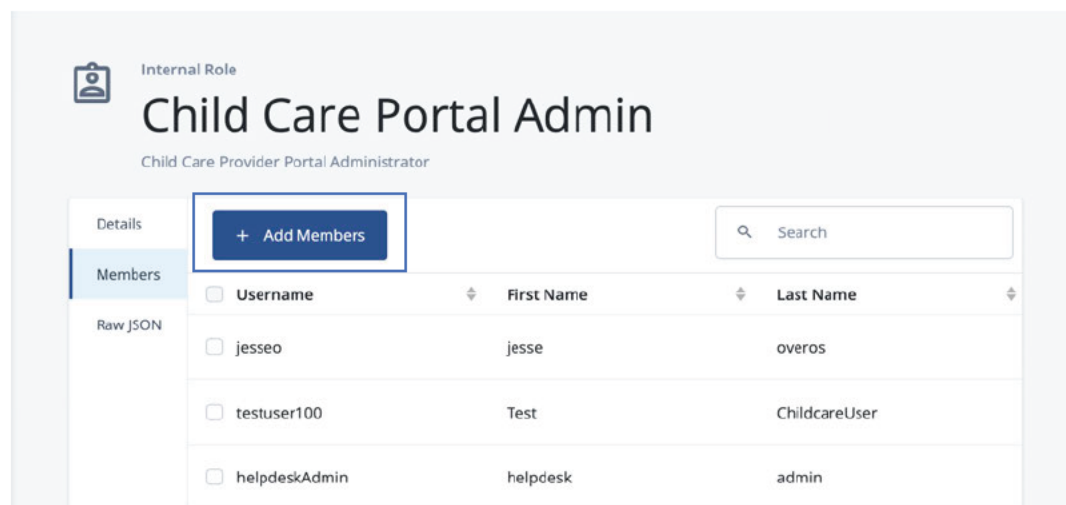
1. To add an Administrator, navigate to the Internal Role tab



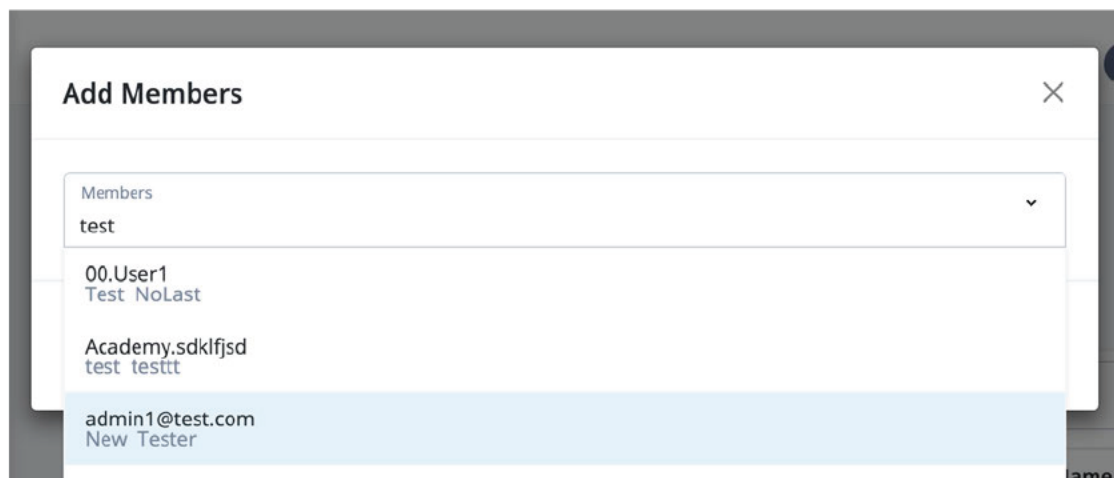
2. Click on the Delegated Administrator role you would like to add the user to



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

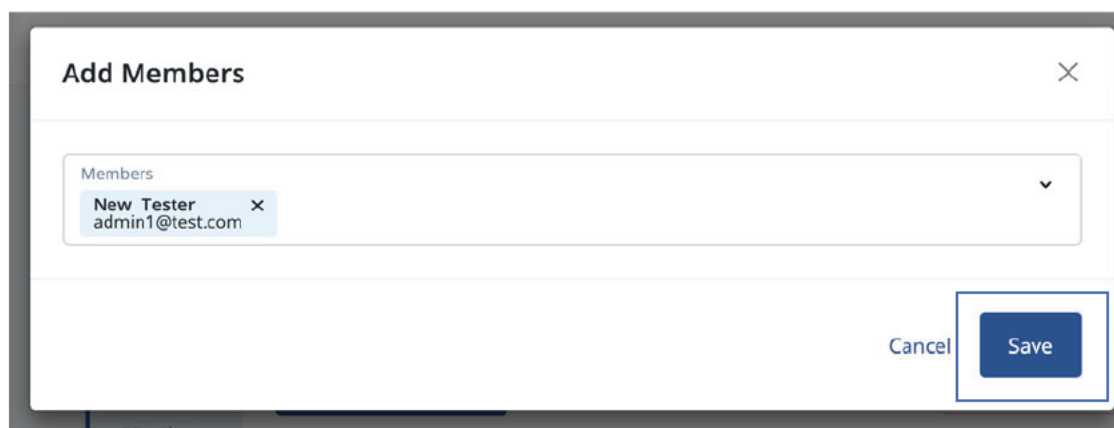


The screenshot shows a modal window titled "Add Members" with a close button (X) in the top right corner. Inside the modal, there is a search bar labeled "Members" with the text "test" entered. Below the search bar, a list of search results is displayed. The results are as follows:

Members
test
00.User1 Test NoLast
Academy.sdklfjsd test testtt
admin1@test.com New Tester

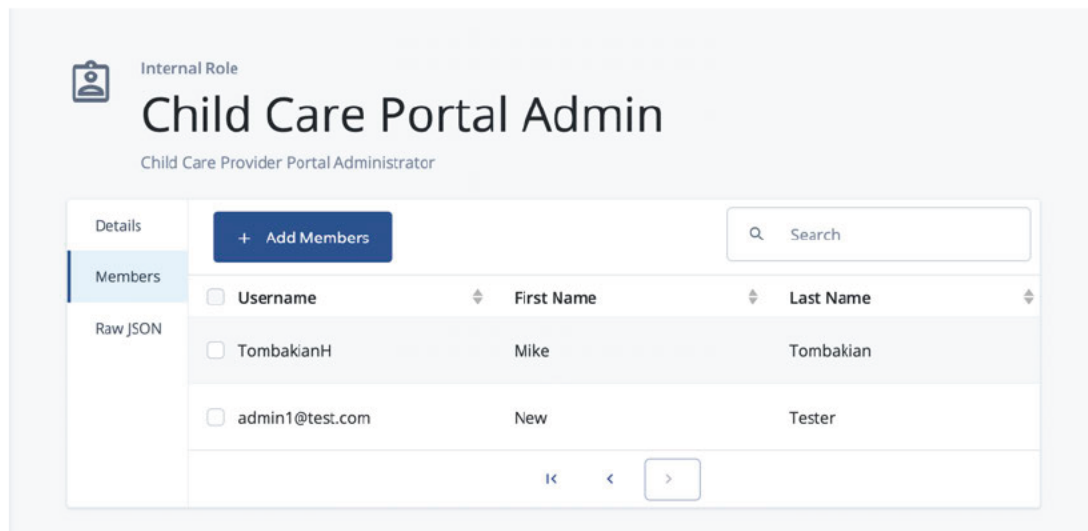
The last result, "admin1@test.com / New Tester", is highlighted in light blue.

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



The screenshot shows the same "Add Members" modal window. The search bar now contains two selected items: "New Tester" and "admin1@test.com", each with a small "X" icon to its right. At the bottom right of the modal, there are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a blue border.

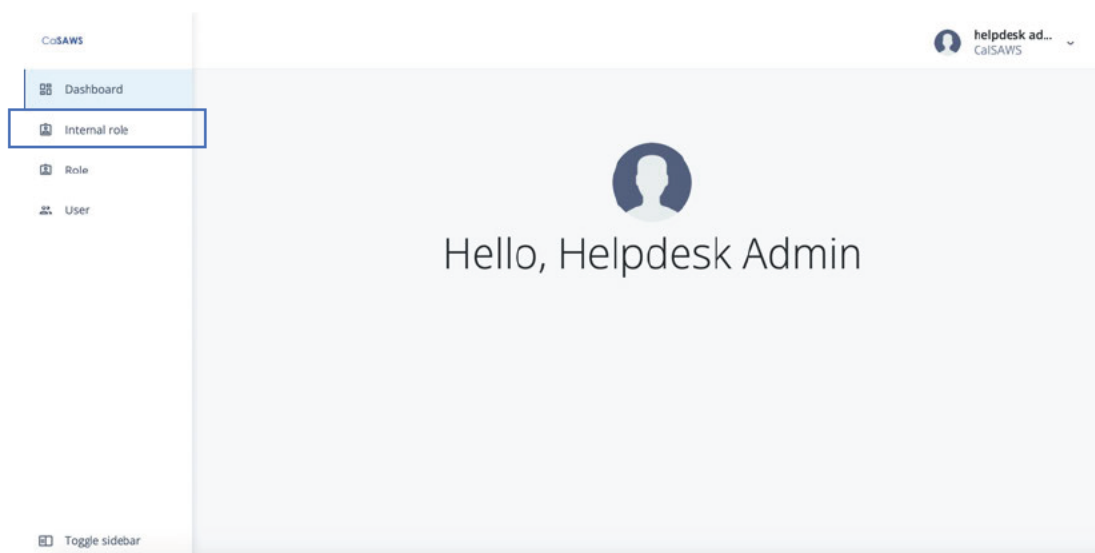
6. The user(s) will now show up in the list of Admins for the given application



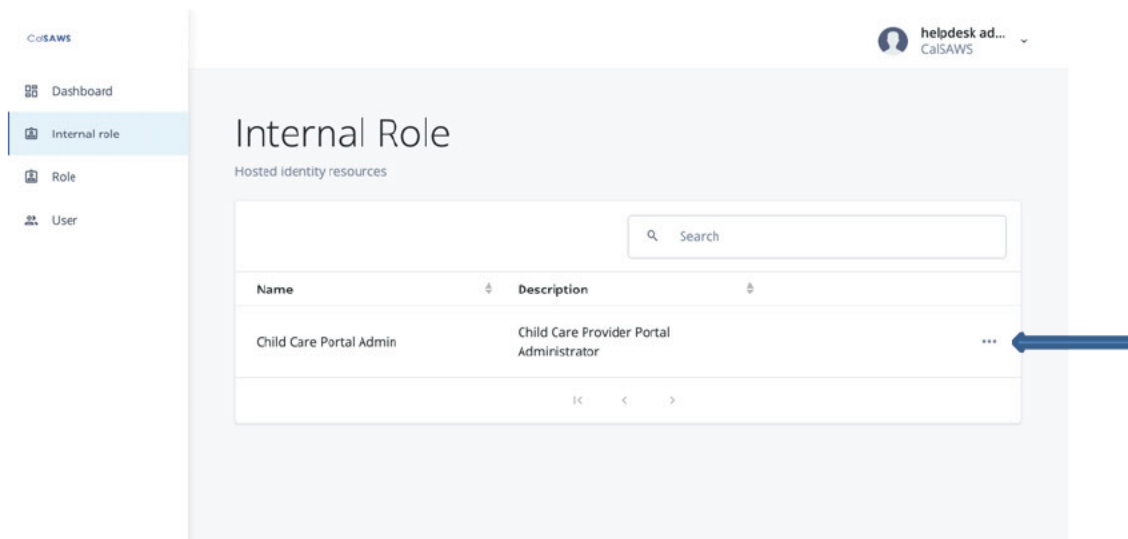
12.0 Revoke Administrator Role (County Help Desk/ Consortium Administrators Only)

County Help Desk Administrators and Consortium Administrators have the privilege to revoke the rights of other Administrators

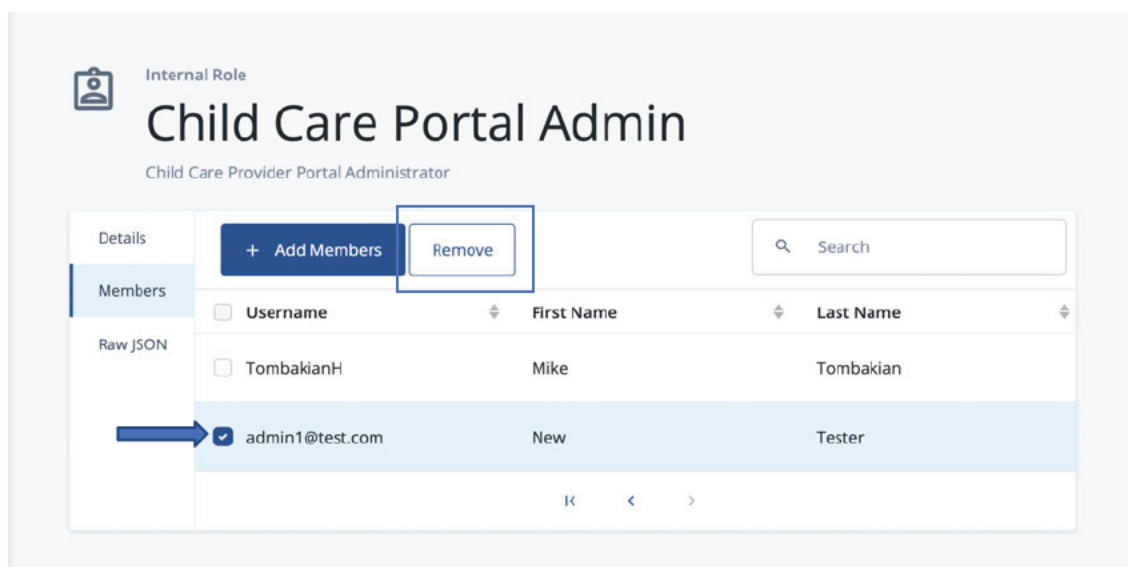
1. To revoke an Administrator, navigate to the Internal Role tab



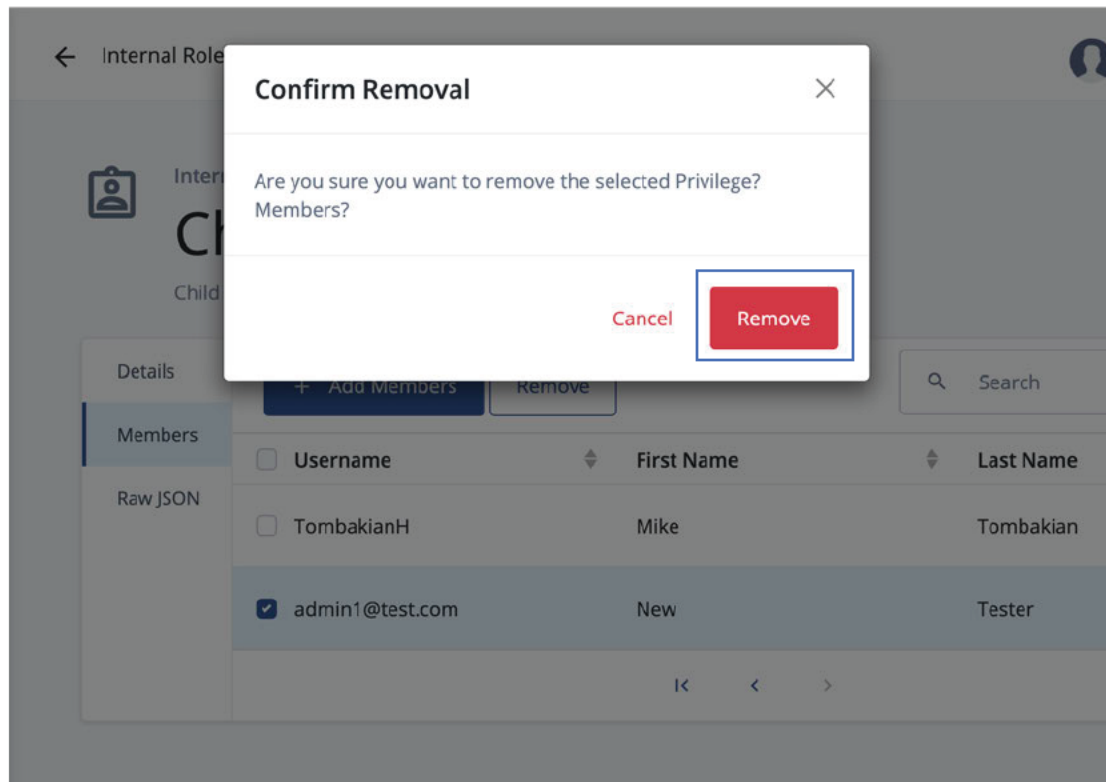
2. Click on the Delegated Administrator role that you'd like to select



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



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



5. This user no longer shows up in the Member list of Admins for the given application

