

User Guide: Delegated Administration Feature

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Administrator will need to communicate new password to the user

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 [County Help Desk/ Consortium Administrators Only]

Revoke Administrator Roles

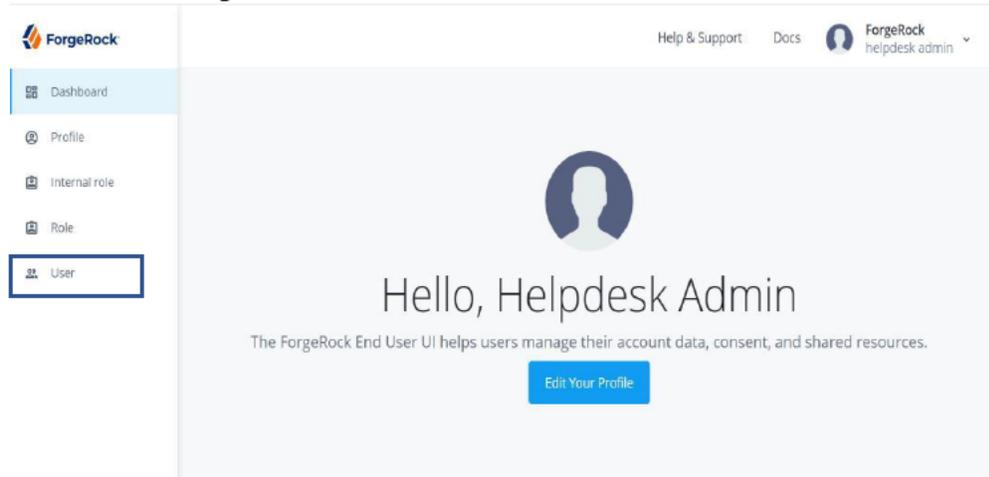
Disable a user's administrator privileges [County Help Desk/ Consortium Administrators Only]

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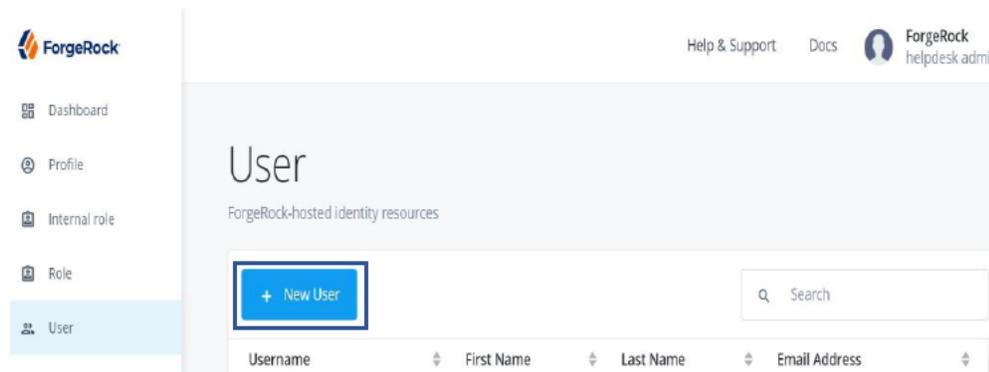
5.0 Create New Users

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

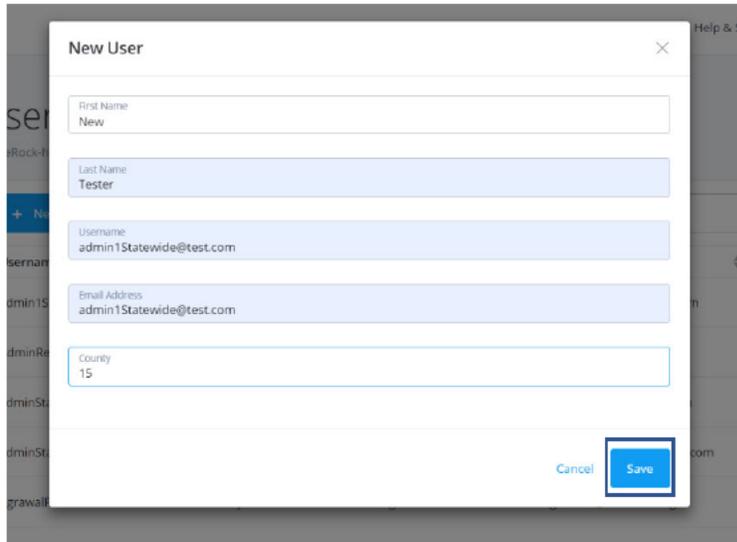


2. Select Add New User (+ New User)



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

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New User

First Name
New

Last Name
Tester

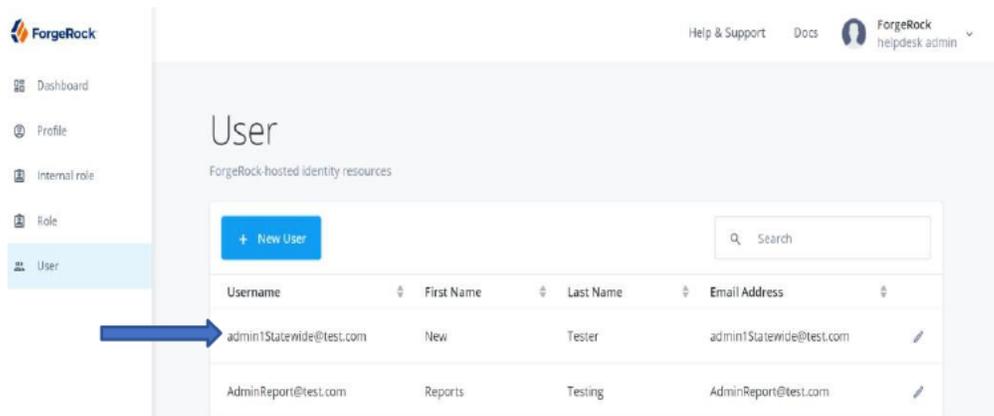
Username
admin1Statewide@test.com

Email Address
admin1Statewide@test.com

County
15

Cancel Save

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



ForgeRock

Help & Support Docs  ForgeRock helpdesk admin

Dashboard

Profile

Internal role

Role

User

User

ForgeRock-hosted identity resources

+ New User

Search

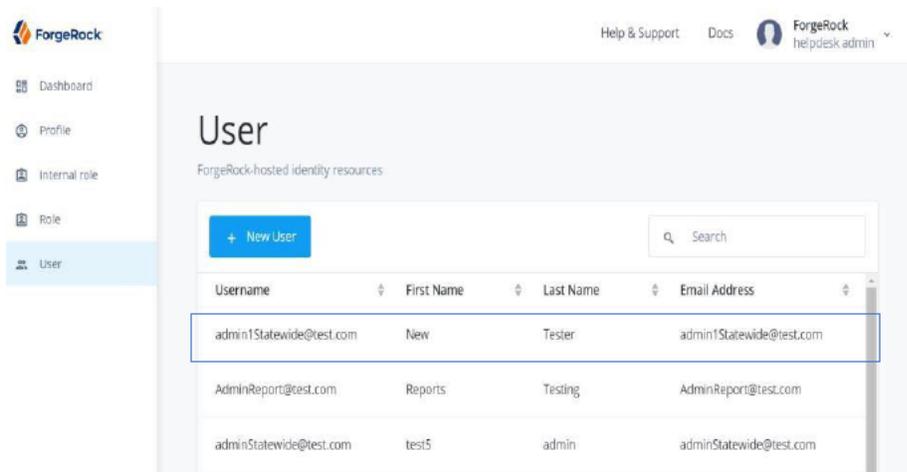
Username	First Name	Last Name	Email Address
admin1Statewide@test.com	New	Tester	admin1Statewide@test.com
AdminReport@test.com	Reports	Testing	AdminReport@test.com

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.

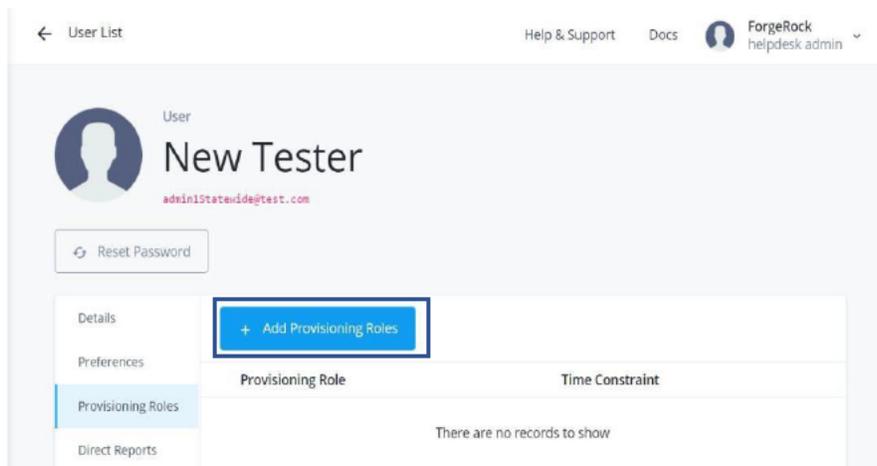
6.0 Assign Access

1. Navigate to the User tab from your application's homepage and click on the user who you'd like to assign access to

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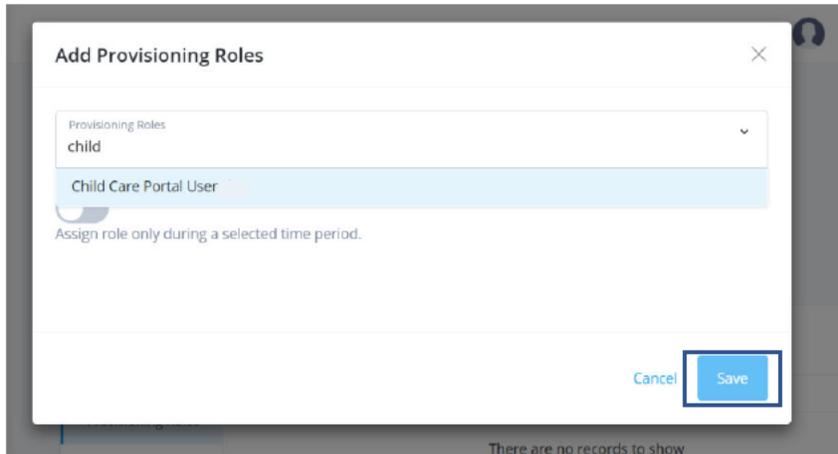


2. Once the user is selected, navigate to the Provisioning Roles tab. Select Add Provisioning Roles (+ Provisioning Roles) to add access

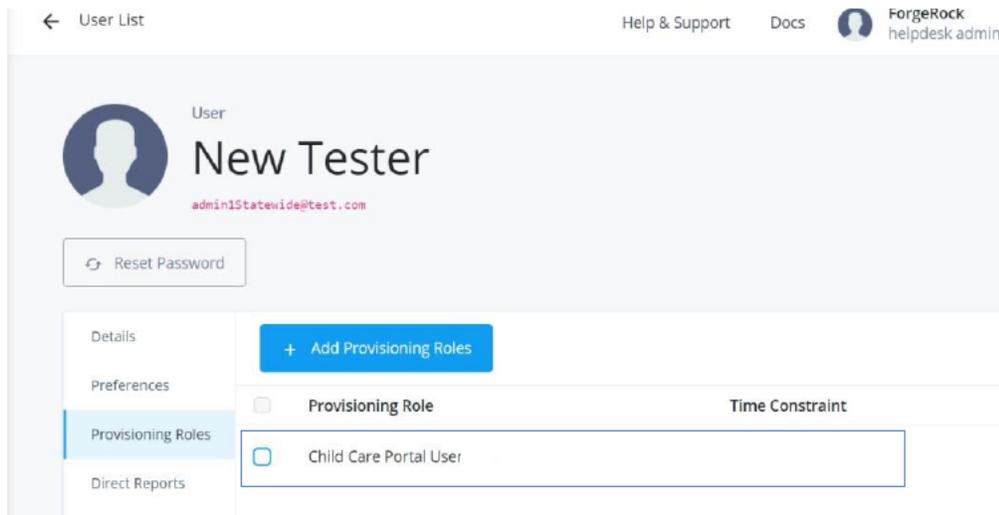


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3. Begin typing in the role that you'd like to add the user to; all available roles will populate. Select your role of choice and click Save



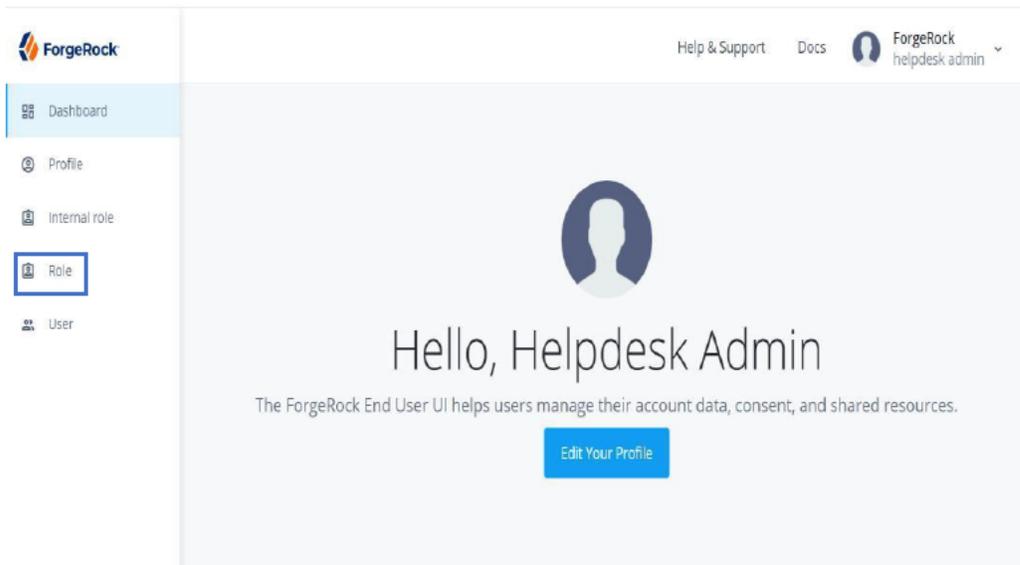
4. The user's new role will now populate in the Provisioning Role list



7.0 Revoke Access

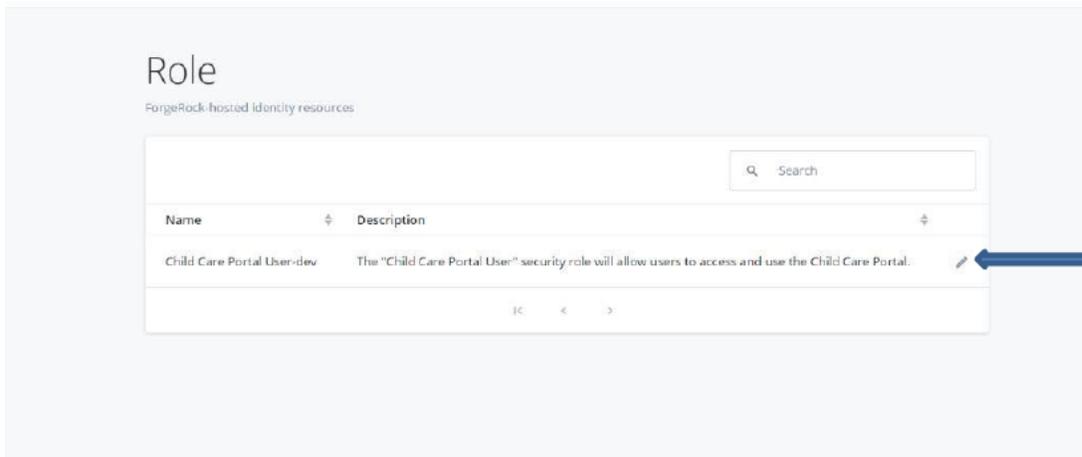
Revoking access is the ability to remove a user’s access to CalSAWS applications that the user has defined privileges to. Users are revoked in cases where the user leaves the company, changes roles/departments, etc.

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

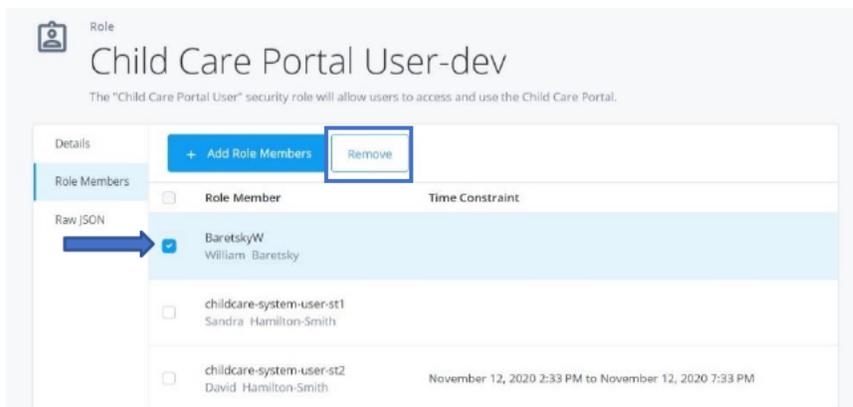


2. All roles that the user has been assigned (or applications which the user has privileges to) will populate. Select the role(s) you wish to revoke by clicking on the pencil next to the role’s name

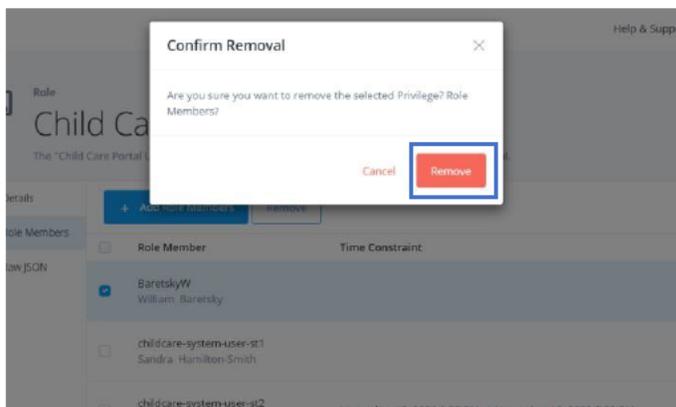
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3. Navigate to Role Members tab and select the user you wish to revoke by checking the check box next to the user's name. Then click remove

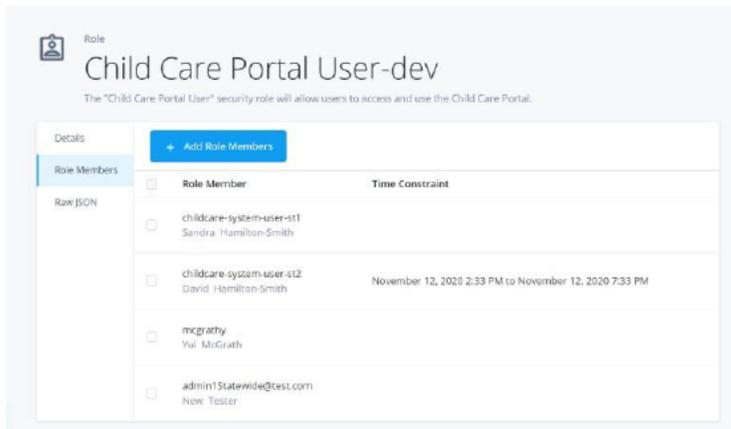


4. You will confirm the removal of this user from the role by clicking Remove



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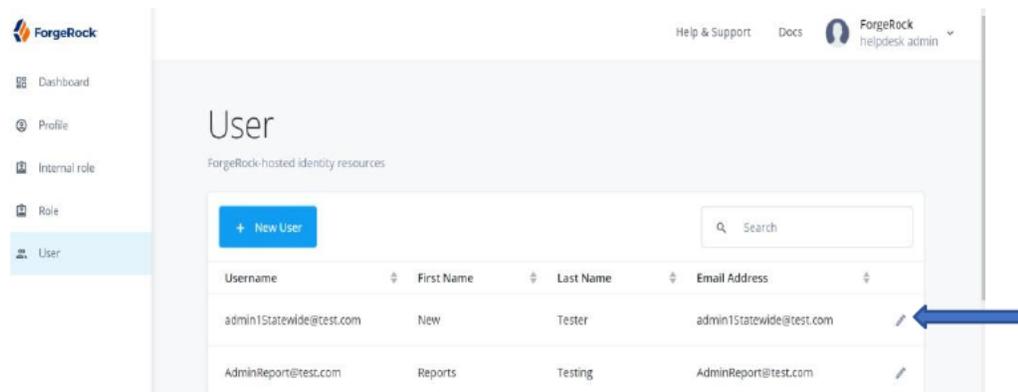
5. The user designated for revocation will no longer appear in the list of Role Members



8.0 Edit New Users

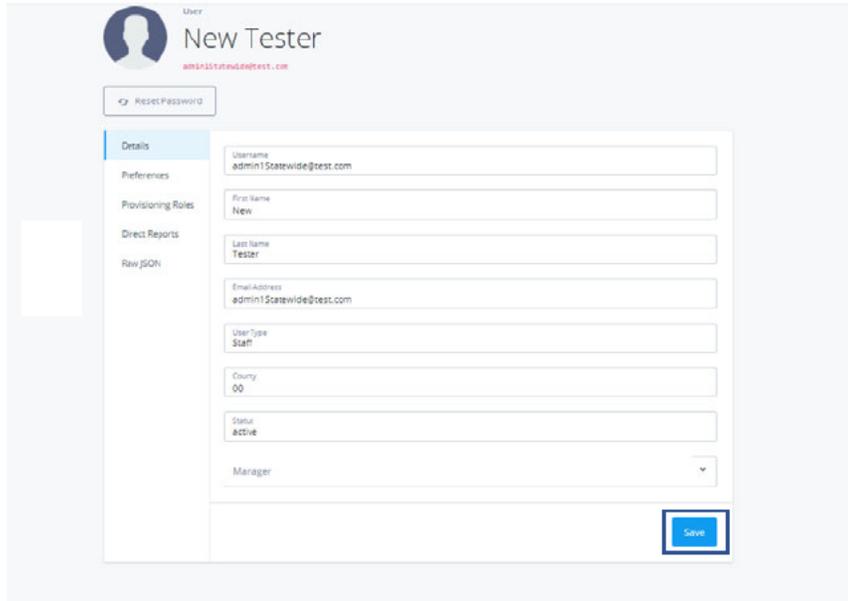
Eligible fields for modification include: first name, last name, staff type, county, status, and manager

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



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



The screenshot shows the user management interface for a user named 'New Tester'. The user's email is 'admin1Statewide@test.com'. The interface includes a 'Reset Password' button and a 'Details' tab. The 'Details' tab contains the following fields:

- Username: admin1Statewide@test.com
- First Name: New
- Last Name: Tester
- Email Address: admin1Statewide@test.com
- User Type: Staff
- County: 00
- Status: active
- Manager: (dropdown menu)

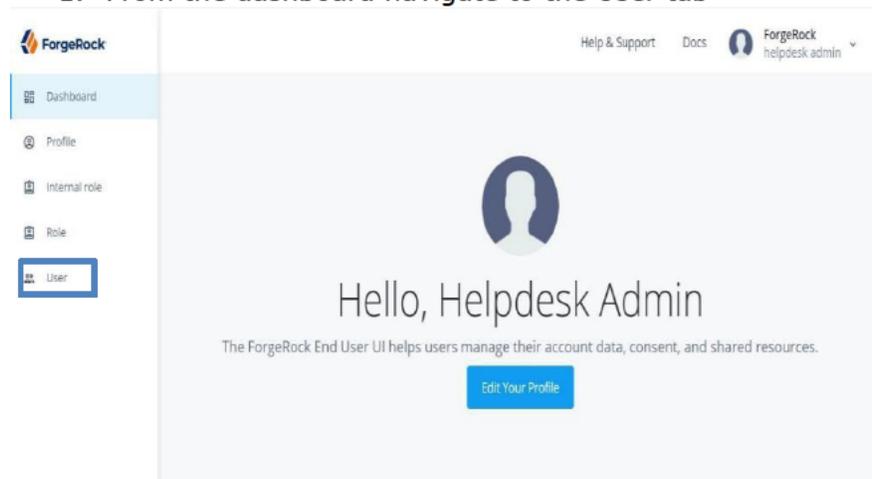
A 'Save' button is located at the bottom right of the form.

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

9.0 Enable Users

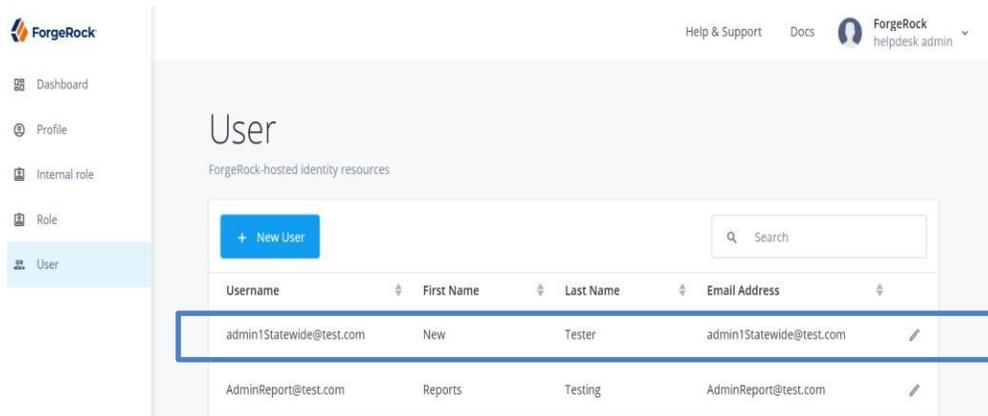
To enable an existing CalSAWS user you will need to edit the user's status from Expired or Inactive to Active outlined in the steps below. Once a user is enabled, that user will be prompted to perform a password reset. To activate the user's account, the user must check their email to retrieve a unique 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

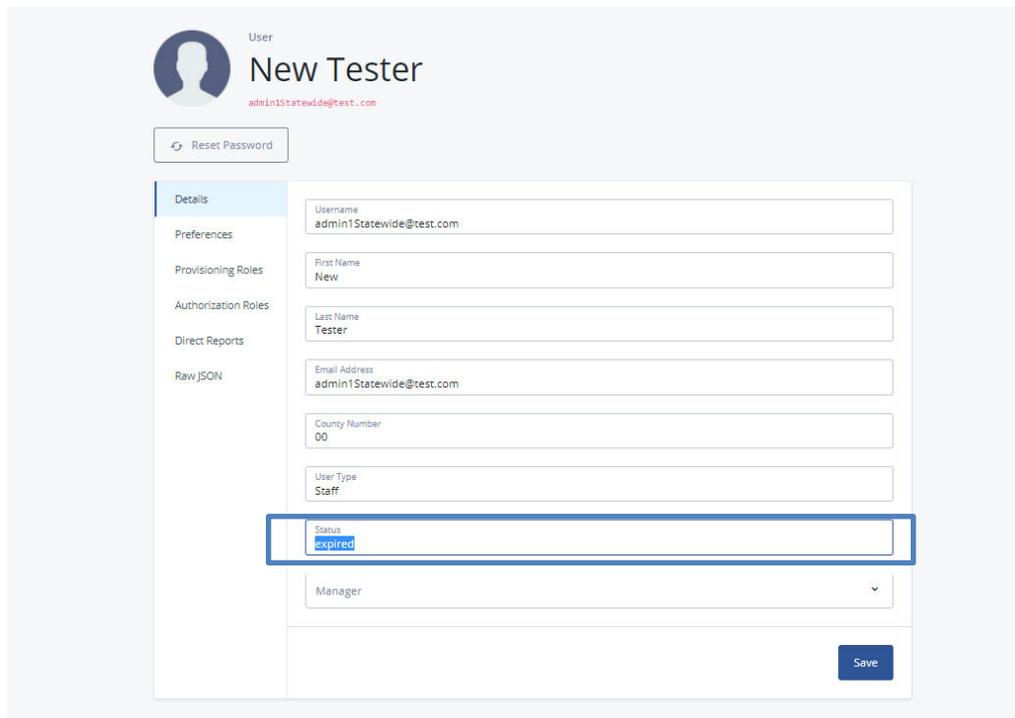


2. Click on the user who you'd like to enable

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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)



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User

New Tester

admin1Statewide@test.com

[Reset Password](#)

- Details
- Preferences
- Provisioning Roles
- Authorization Roles
- Direct Reports
- Raw JSON

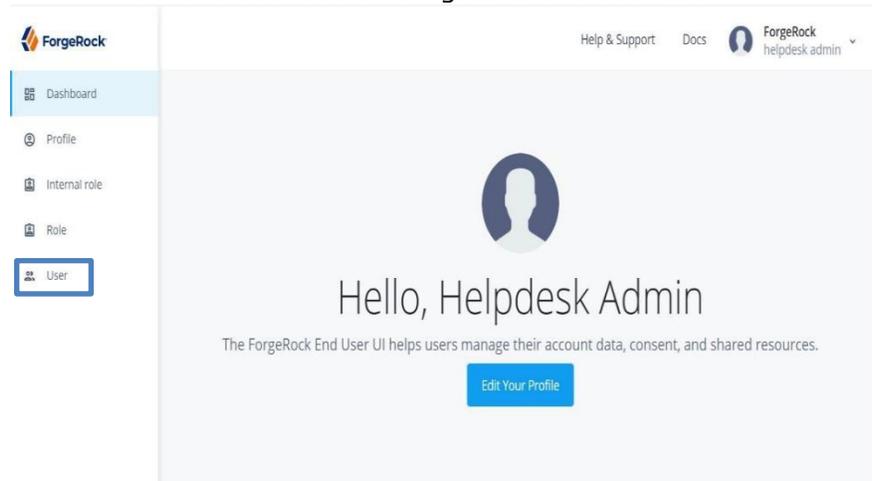
Username	admin1Statewide@test.com
First Name	New
Last Name	Tester
Email Address	admin1Statewide@test.com
County Number	00
User Type	Staff
Status	Active
Manager	Manager

[Save](#)

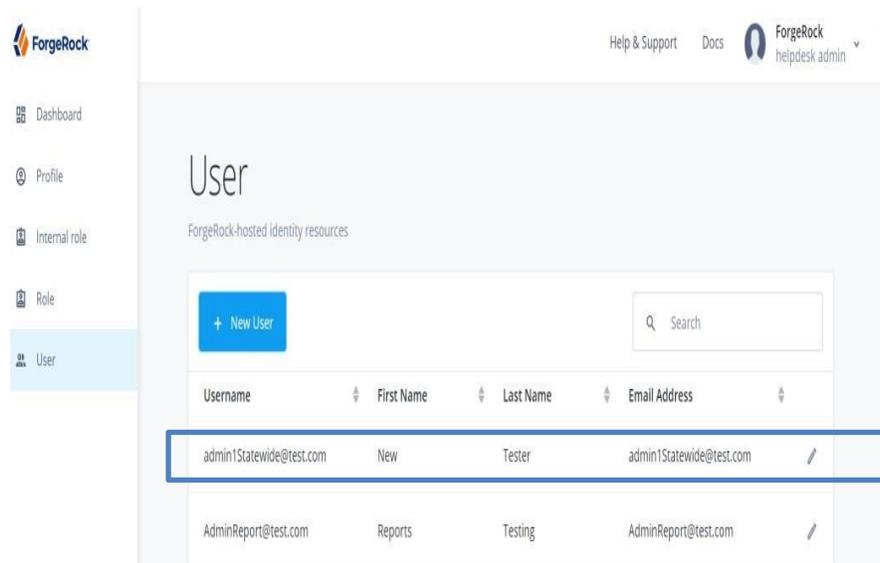
10.0 Steps to Disable a User

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

The screenshot shows the user profile page for 'New Tester'. The 'Status' dropdown menu is open, showing 'Inactive' selected. A 'Save' button is visible at the bottom right.

11.0 Password Reset Steps

Steps below outline how to reset the password for users within the Delegated Administrator's county. Password reset lasts for 60 days. Once a Delegated Administrator resets a user's password, the new password needs to be communicated to the user. After successful password reset, the user can then log into their CalSAWS account to reset the current password to a password of the user's choice using this link:



1. Type in username of the user whose password needs to be reset and press enter. Delegated Administrators are only able to view user's within their own county

The screenshot shows the 'User' management page. A search bar contains 'emilytang'. Below the search bar is a table with columns: Username, First Name, Last Name, Email Address, County Number, County Name, and User Type.

Username	First Name	Last Name	Email Address	County Number	County Name	User Type
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2. The user's account will populate. Click on the user

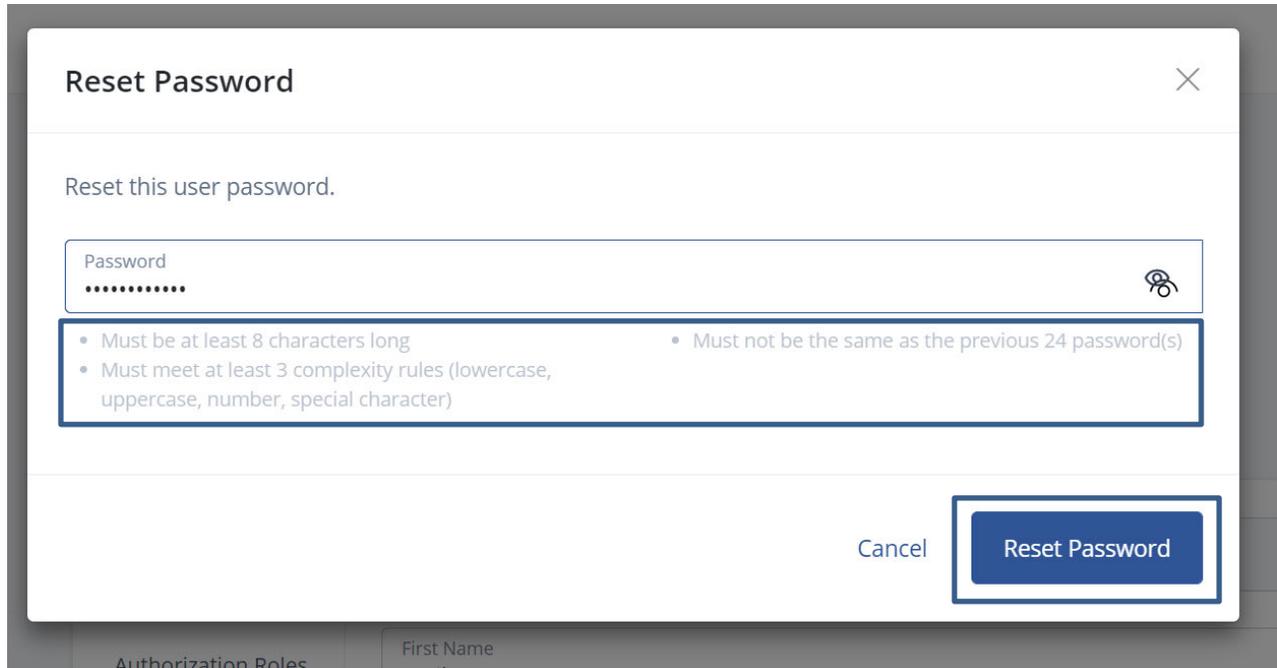
The screenshot shows the 'User' management interface. At the top left is a '+ New User' button. To its right is a search bar containing 'emilytang'. Below these is a table with columns: Username, First Name, Last Name, Email Address, County Number, County Name, and User Type. The first row of the table is highlighted with a blue border and contains the following data: Username: emilytang, First Name: emily, Last Name: tang, Email Address: emily.tan g@accent ure.com, County Number: 19, County Name: Los Angeles, User Type: CBO. Below the table are navigation arrows.

Username	First Name	Last Name	Email Address	County Number	County Name	User Type
emilytang	emily	tang	emily.tan g@accent ure.com	19	Los Angeles	CBO

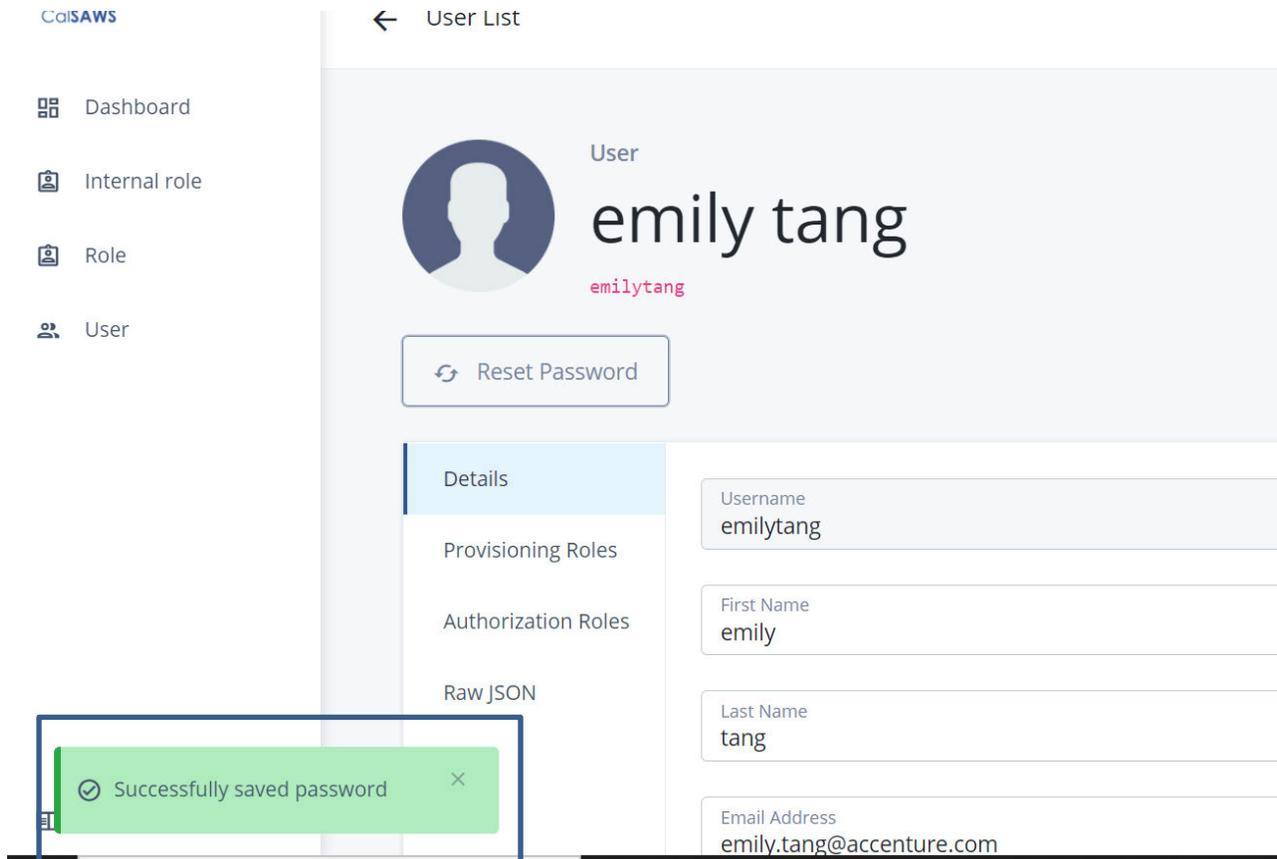
3. At the top left, the option to Reset Password appears. Click on Reset Password

The screenshot shows the user profile page for 'emily tang'. At the top left is a user profile icon and the text 'User emily tang' with 'emilytang' below it. Below this is a 'Reset Password' button, which is highlighted with a blue box. To the right of the button is a sidebar menu with options: Details, Provisioning Roles, Authorization Roles, and Raw JSON. The main content area shows a form with fields for Username (emilytang), First Name (emily), Last Name (tang), and Email Address.

4. Type in password of your choice following the guidelines listed, then click Reset Password to finalize password change



The image shows a 'Reset Password' dialog box with a close button (X) in the top right corner. The main text reads 'Reset this user password.' Below this is a password input field with a strength indicator icon on the right. Underneath the input field is a list of password requirements: 'Must be at least 8 characters long', 'Must meet at least 3 complexity rules (lowercase, uppercase, number, special character)', and 'Must not be the same as the previous 24 password(s)'. At the bottom right of the dialog are two buttons: 'Cancel' and 'Reset Password', with the latter being highlighted with a blue border.



The image shows a 'User List' page in the CalSAWS system. On the left is a navigation menu with items: Dashboard, Internal role, Role, and User. The main content area shows the details for a user named 'emily tang' with the username 'emilytang'. A 'Reset Password' button is visible above the details. The details are organized into sections: 'Details' (highlighted), 'Provisioning Roles', 'Authorization Roles', and 'Raw JSON'. The 'Details' section contains the following information: Username: emilytang, First Name: emily, Last Name: tang, and Email Address: emily.tang@accenture.com. A green notification banner at the bottom left of the details section reads 'Successfully saved password' with a close button (X).

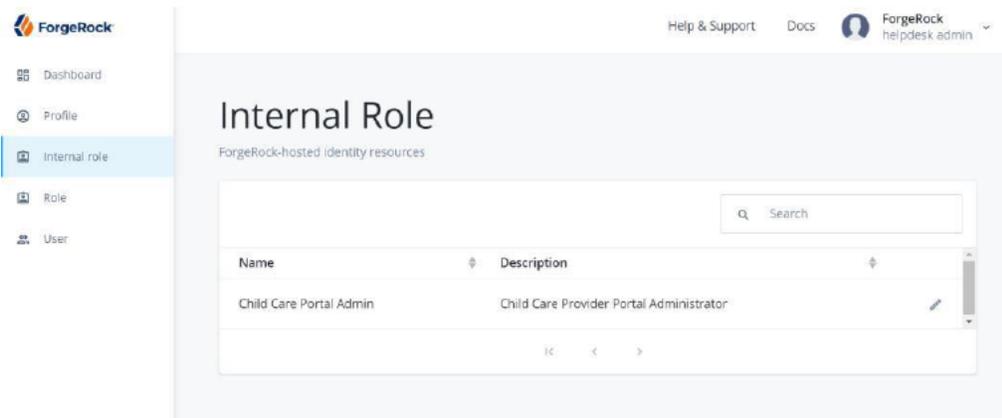
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5. You will then receive notification that the user's password was successfully reset. The Delegated Administrator will need to follow up with user to communicate new password.

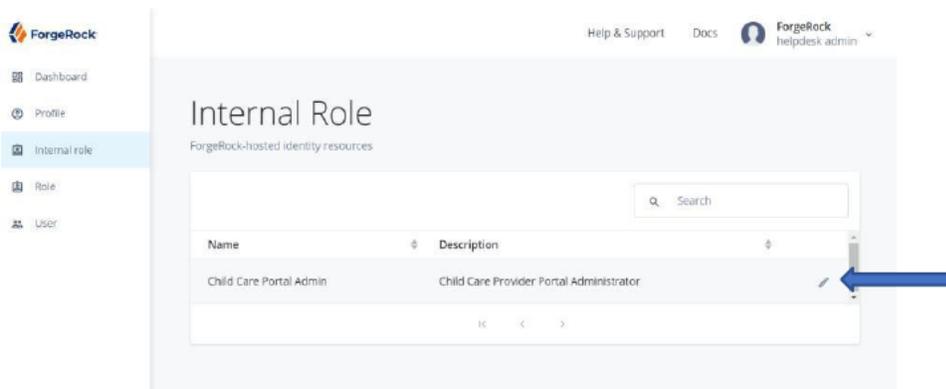
12.0 Assign Administrator Role (County Help Desk/ Consortium Administrators Only)

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 pencil next to the user's name that you wish to make a Delegated Administrator



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

Internal Role

Child Care Portal Admin

Child Care Provider Portal Administrator

Details

Members

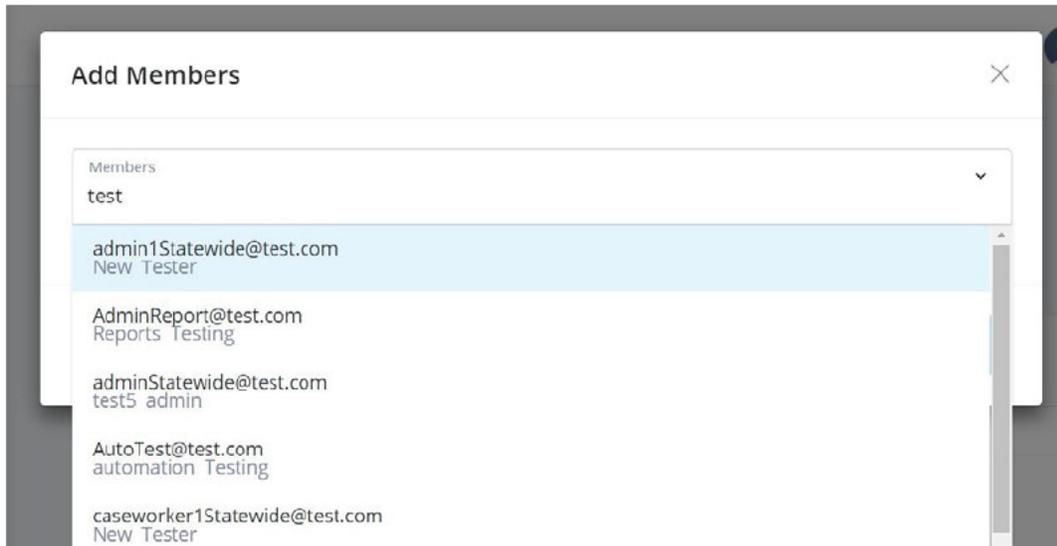
Raw JSON

[+ Add Members](#)

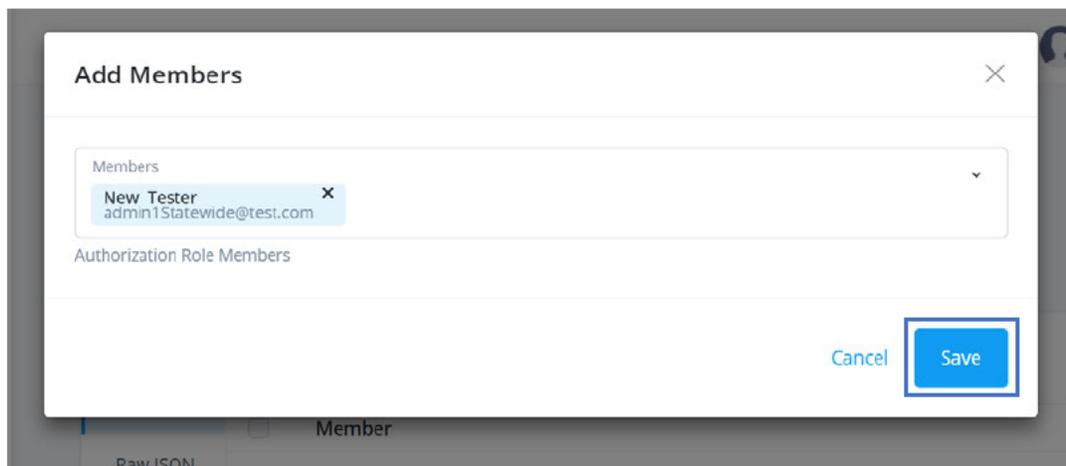
Member
<input type="checkbox"/> helpdeskAdmin helpdesk admin
<input type="checkbox"/> helpdeskadminanduser helpdeskadminanduser adminanduser

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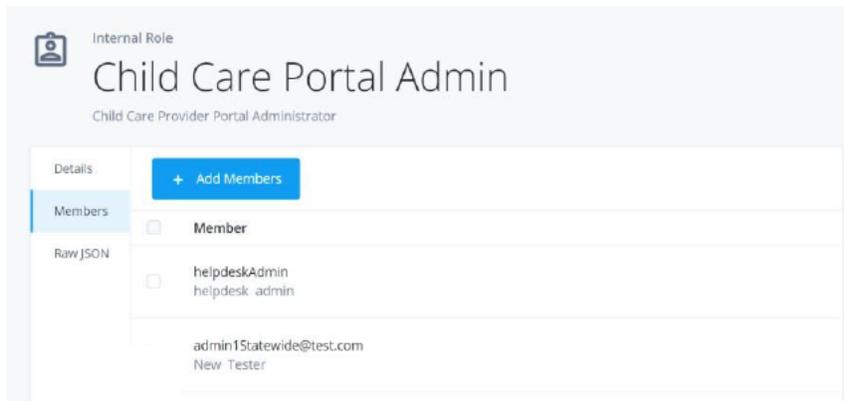
4. Begin typing the name of the user(s) you'd like to add. Only users in your designated county and state-wide users will populate. You can add more than one user



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



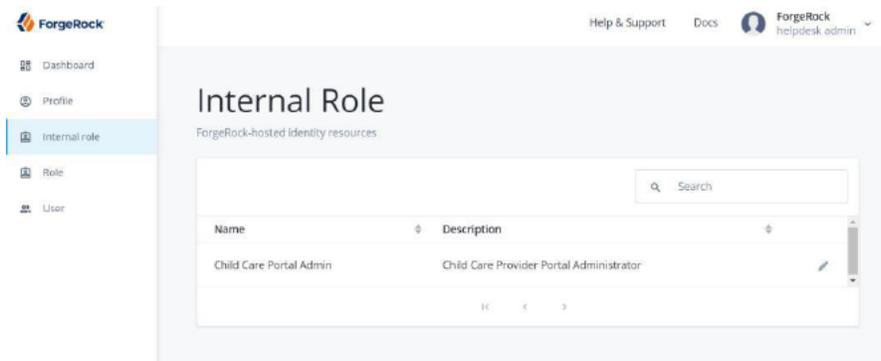
6. The user(s) will now show up in the list of Admins for the given application



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

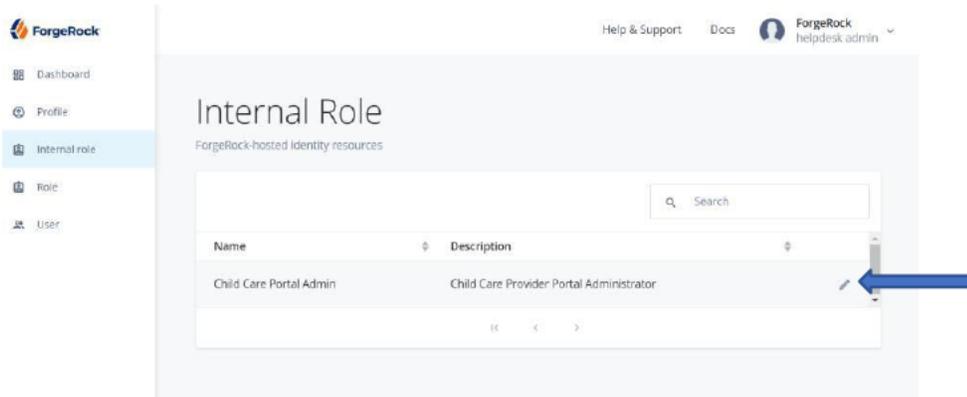
County Help Desk Administrators and Consortium Administrators have the privilege to revoke the rights of other Administrators

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

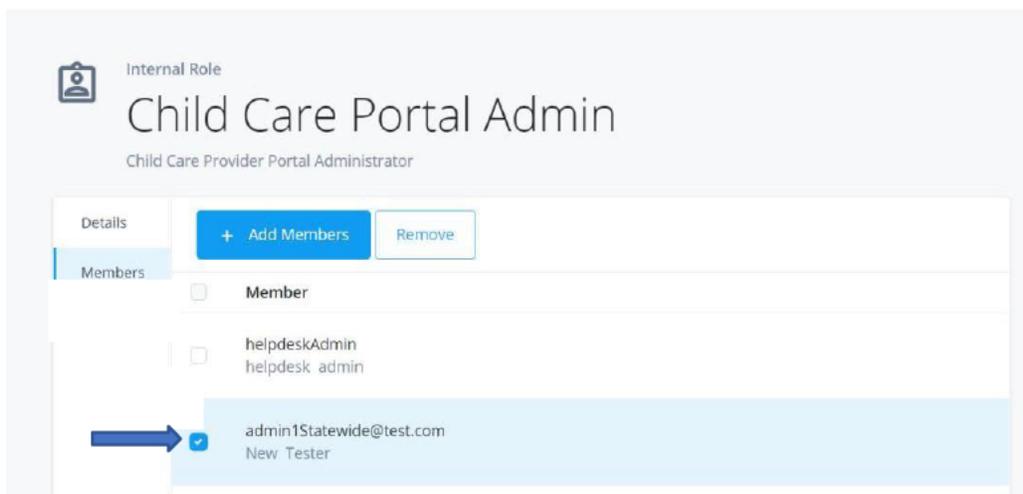


2. Click on the pencil next to the Delegated Admin that you'd like to select

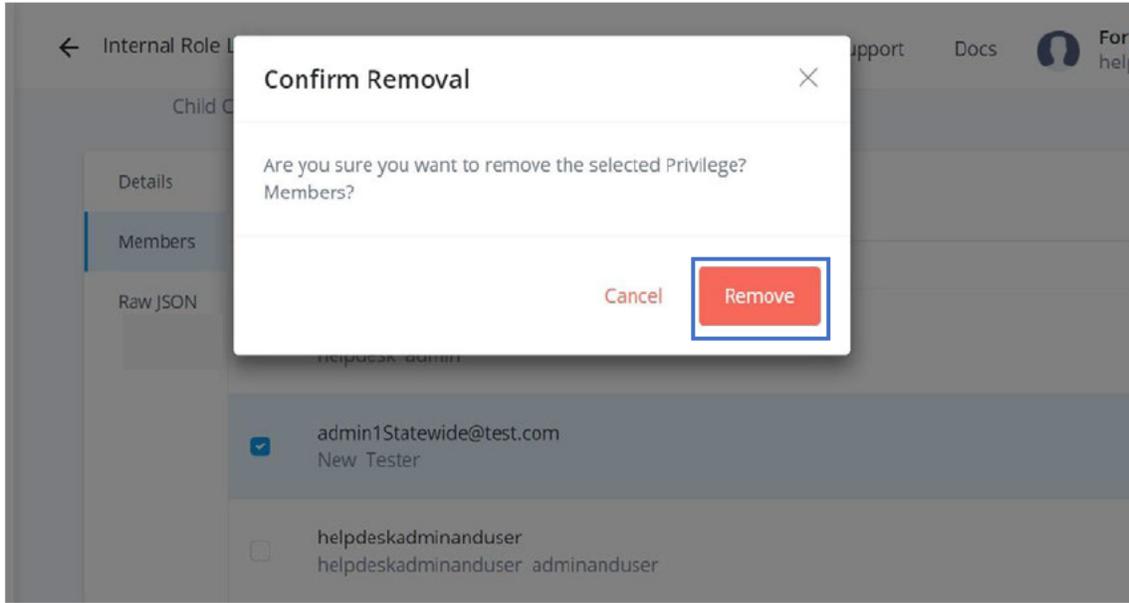
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3. Navigate to the Members tab and check the box next to the name of the Administrator whose access you wish to revoke



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

