CalSAWS | Security Matrix Instructions

Updates can be made during the County Prep Phase

County Prep Phase Dates: 08/30/2021 – 9/23/2021

This guide provides detailed instructions for Security Administrators to review and update County Security Profiles in preparation of the County Prep Phase

Background

Updating Security Access in CalSAWS is the same functional process as in C-IV today.

During the Go Live cutover weekend, the Conversion team will be converting all C-IV Project and County Maintained Roles to CalSAWS. There are currently two types of security categories that apply to the CalSAWS system. There are the Project Maintained Security Roles, which the Project maintains and updates. There are also the County Maintained Roles, which are created and maintained individually by each of the 39 C-IV counties. The Security Matrix lists certain Security Groups that exist in CalSAWS that the conversion team is unable to map to County Maintained Roles.

The Security Matrix is a listing of security groups that the C-IV Counties can review and make any necessary updates to current County Maintained Roles. During the County Prep Phase, Counties will have the opportunity to manually update the County Maintained Roles to ensure that each role has the desired security rights. **Note:** Counties will have rights to update County Maintained Roles; Project Maintained Roles will continue to be maintained by the CalSAWS Project.

The Security Matrix is an Excel Document comprised of the following tabs:

- ROLES_GRPS
    - This table will be utilized by the county to review the current County Maintained Role and document the changes that will be updated during the County Prep Phase.
    - The table consists of the following columns:
        - Column A: County Code for each 39 C-IV Counties
        - Column B: County Name
            - Note: This column lists all 39 C-IV Counties, along with the Project Maintained Roles (LRS and C-IV)
        - Column C: Role Name
        - Column D – AZZ: Security Right Group
- RIGHTS_GRP
    - This refence table identifies the rights that are associated to each security right group.
    - The table consist of the following columns:
        - Column A: Right Name
        - Column B – AZX: Security Right Group
- GROUPS
    - This table provides an overview of each security group name and provides a description for each security group type.
    - The table consists of the following columns:
        - Column A: Group Name
        - Column B: Group Description
        - Column C: Report Description
            - If the Security Group provides access to a specific CalSAWS Report, the full description of the report is provided here
        - Column D: Functional Area/Committee
            - This column includes the functional area that is associated to the Group
        - Column E: Group Status
            - CalSAWS only group – These groups exist only in the CalSAWS system and are **new** to the C-IV counties
            - C-IV only group – These groups exist only in C-IV, and do not apply to the CalSAWS system
            - Common group – These groups apply to both systems and will be converted from C-IV as a one-to-one match in CalSAWS
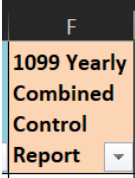
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    - ▪ Column F: Maps to C-IV Role
        - • If 'Yes', this means that the Project has mapped the new CalSAWS group to a C-IV role as guidance for how to map your County-maintained role
    - ▪ Column G: Contained in the County Prep Phase Packet
        - • If 'Yes', this means that further detail on the security group's functionality is provided in the associated County Prep Phase Packet
- RIGHTS
    - o This table provides an overview of all Security Rights that can be assigned, and the pages impacted by each Security Right Type
    - o The table consists of the following columns:
        - ▪ Column A: Security Right Name
        - ▪ Column B: Security Right Status
            - • CalSAWS only Rights – These rights exist only in the CalSAWS system and are new to the C-IV counties
            - • C-IV only Rights – These rights exist only in C-IV, and do not apply to the CalSAWS system
            - • Common Rights – These rights apply to all systems and will be converted from C-IV as a one-to-one match in CalSAWS
        - ▪ Column C: Pages Affected

Impact Analysis

Security Rights allow the CalSAWS end user to access certain functionality within CalSAWS, which allows the CalSAWS end user to maneuver through the system based on the Security Roles and Security Groups they are assigned. By designating these security rights during the County Prep Phase, Counties can ensure that their individual County Maintained Roles have the desired level of access at Go-Live, ensuring that CalSAWS end users have the rights or abilities to perform their job functions within the system. County Security Administrators will have the ability to update security roles during the County Prep Phase and on an ongoing basis after Go-Live.

Instructions

Step	Action
1.	Open the Security Matrix.
2.	Click on the **GROUPS** tab.
3.	Using Column E, **GROUP STATUS**, filter for the value of 'CalSAWS Only Groups' to see the Groups that do not exist in C-IV today. Review the **GROUP DESCRIPTION**, **REPORT DESCRIPTION**, and **FUNCTIONAL AREA/COMMITTEE** columns for additional context on the functions behind each group.
4.	Click on the **ROLES_GRPS** tab. The columns that are highlighted in the light orange color (example in image below) are the new CalSAWS groups that are

		labeled as 'CalSAWS only group' on the **GROUPS** tab.
		F 1099 Yearly Combined Control Report
5.		Using Column B, **COUNTY_NAME**, filter the spreadsheet for your county, which will demonstrate all the County Maintained Roles to be reviewed. **Note:** The spreadsheet can also be filtered to include the C-IV and LRS roles. Doing so will provide an overview of Project Maintained Roles, which can be used as reference when updating County Specific Roles
6.		Review each of the current County Maintained Roles listed under column C, **ROLE_NAME** and view the Security Group mappings in columns **D** through columns **AZZ** that are marked with an **X**.
7.		If your County would like to update its current County Maintained Roles with additional security mappings, mark the associated cell with a highlighted **A** for the desired Security Group in the same row as the Role Name. If you would like to remove a security mapping, mark the associated cell with a highlighted **R.** This will allow the Security Administrator to easily identify the security groups that will be updated during the County Prep Phase.
8.		To obtain a description of each Security Right, click on the **RIGHTS** tab, which is a reference table. This table lists all the security rights by name and provides the list of associated pages affected by each security right. Click on the **RIGHTS_GRP** tab to confirm what is being shown in the **RIGHTS** tab by checking the marked cells for each group.
9.		To identify the security rights associated to each security group, click on the **RIGHTS_GRP tab**. In Row 1, you will find all the security groups contained in the CalSAWS System. **Column A** identifies the name of the security rights that are assigned to each security group. If the security right named in column A, has an **X**, this will indicate that the security right is assigned to the security group in the corresponding column.
10.		Once complete, **SAVE** the Security Matrix, which will be referenced by your County's Security Administrator(s) during the County Prep Phase to update (add/remove) security rights.

Additional Notes

For Functional Questions, please follow the following order of precedence for getting the questions answered:

1) County SMEs
2) Regional Committee Members
3) Change Network Champions
4) IPOCs/PPOCs
5) Implementation@CalSAWS.org