



CalWIN ISS
Implementation Support Services

Go-Live Packet (GLP) – Appendix J –
Adding Databank Collaborators Setup

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CalSAWS Implementation Support Services

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1 COLLABORATOR PROCESS DESCRIPTION

Collaborators are a type of user who have limited access to CalSAWS to view and modify some information related to resources to which they are assigned/added to.

1.1 PRE-REQUISITES

To add a collaborator user to CalSAWS:

- There should be a corresponding entry existing in ForgeRock with their username and other information. Collaborator users are added within the ForgeRock application, please follow County policy for adding these users to ForgeRock.
- The user should also not be an active “regular” (i.e., non-collaborator) staff/user of CalSAWS.

To give access to resources to the collaborator user in CalSAWS:

- The resources need to be created or already exist within CalSAWS.

1.2 PROCESS AND CALSAWS PAGES

1.2.1 ADDING A COLLABORATOR USER AND RESOURCE ACCESSES

1. Navigate to the **Resource Detail** page for a resource that the collaborator will be assigned to.
2. In the *Resource Access* section of the page, select *CalSAWS Identity* from the *Type* drop list and click the *Add* button.

Note: The Active Directory option in the *Type* drop list is currently only relevant for Los Angeles County.

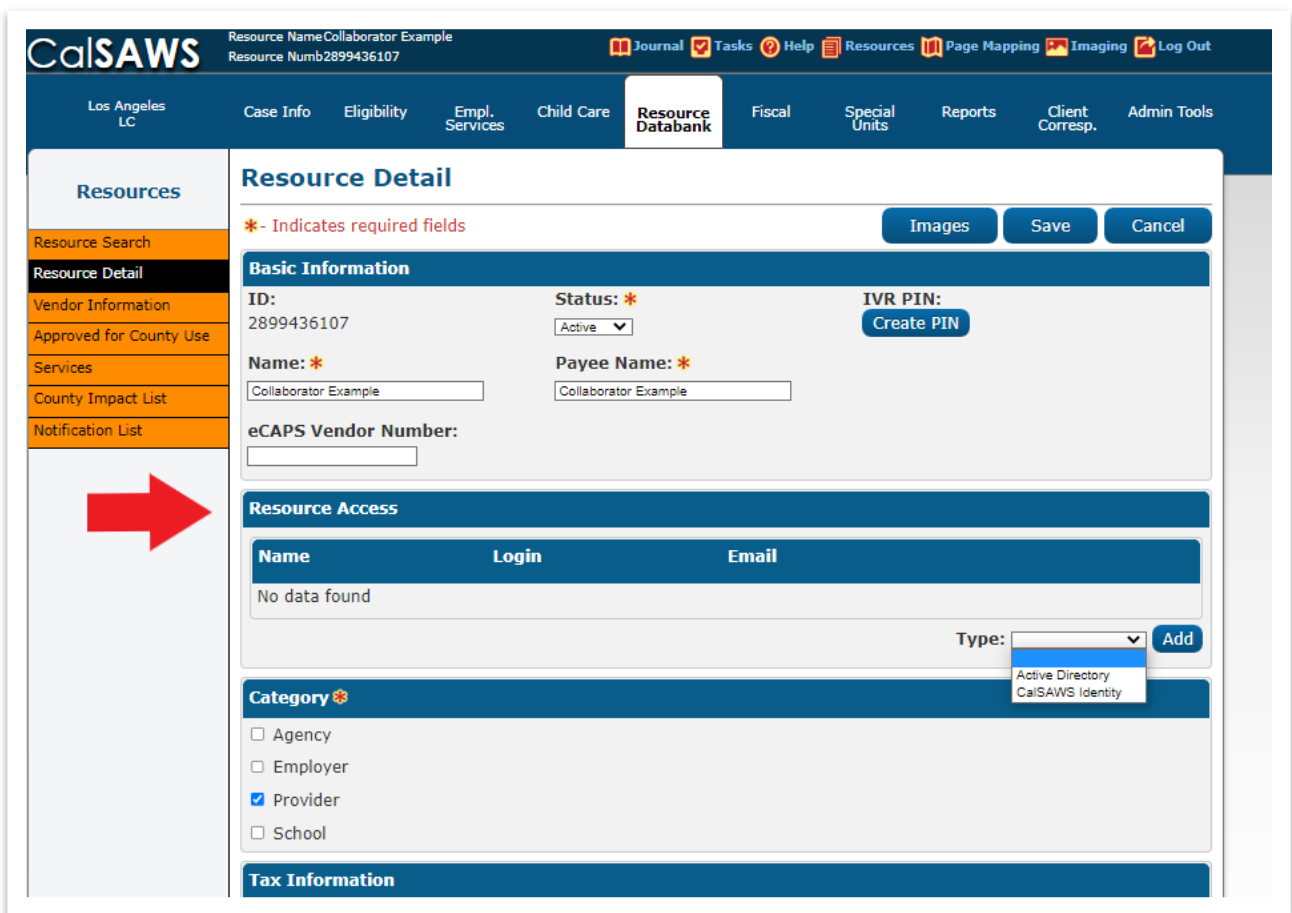


Figure 1.2-1 – Resource Detail Page

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- This will navigate you to the **CalSAWS Identity Search** page. From here, you can search for existing users in ForgeRock to select them and add them as collaborators. There are three (3) options for searching – by name, username (login name), or email address.

The screenshot displays the CalSAWS Identity Search interface. At the top, the CalSAWS logo is on the left, and user details (Resource Name: Collaborator Example, Resource Num: 2899436107) and navigation icons (Journal, Tasks, Help, Resources, Page Mapping, Imaging, Log Out) are on the right. Below this is a secondary navigation bar with 'Los Angeles LC' and menu items: Case Info, Eligibility, Empl. Services, Child Care, Resource Databank (highlighted), Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. A left sidebar under 'Resources' lists: Resource Search (highlighted), Resource Detail, Vendor Information, Approved for County Use, Services, County Impact List, and Notification List. The main content area is titled 'CalSAWS Identity Search' and includes a legend: '* - Indicates required fields'. The search form has a 'Search By:' dropdown set to 'Name'. Below it are three input fields: 'Last Name: *', 'First Name: *', and 'Middle Name:'. A 'Search' button is in the top right of the form. At the bottom right, there is a 'Results per Page:' dropdown set to '25' and another 'Search' button.

Figure 1.2-2 – CalSAWS Identity Search Page

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4. Click the *Search* button after selecting a *Search By* option and filling out the available fields to receive a list of search results.

The screenshot displays the CalSAWS Identity Search interface. At the top, the CalSAWS logo is on the left, and user information (Resource Name: Collaborator Example, Resource Num: 2899436107) and navigation icons (Journal, Tasks, Help, Resources, Page Mapping, Imaging, Log Out) are on the right. Below this is a menu bar with options: Los Angeles LC, Case Info, Eligibility, Empl. Services, Child Care, Resource Databank (highlighted), Fiscal, Special Units, Reports, Client Corresp., and Admin Tools.

The main content area is titled "CalSAWS Identity Search". It includes a legend: "* - Indicates required fields". A "Refine Your Search" dropdown is present. A "Search" button is located to the right of the search criteria.

The search criteria section is titled "Search By: *" and contains a dropdown menu set to "Email". Below it is an "Email:" input field with the text "munceb@calsaws.org". To the right of the input field is a "Results per Page: 25" dropdown and another "Search" button.

The search results are displayed in a "Search Results Summary" section, showing "Results 1 - 1 of 1". There are "Select" and "Cancel" buttons above and below the results table.

	Name	Login	Email
<input type="radio"/>	B Munce	MunceB	MunceB@CalSAWS.org

Figure 1.2-3 – CalSAWS Identity Search Page

5. Select a result from the available search results with the radio button on the left, then click the *Select* button. As mentioned in the prerequisites, if the user is an active CalSAWS staff, this will be rejected with a validation message:

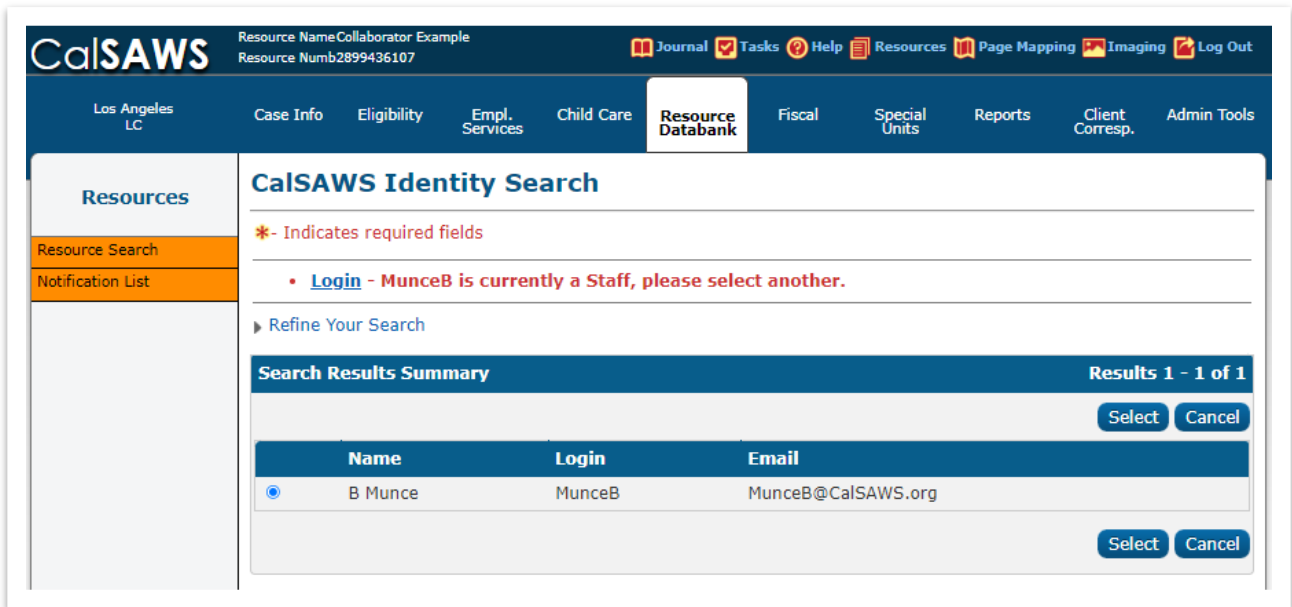


Figure 1.2-4 – CalSAWS Identity Search Page

- Otherwise, you will be returned to the **Resource Detail** page in edit mode with the selected user having been added to the *Resource Access* section of the page. **Save** or close the page.

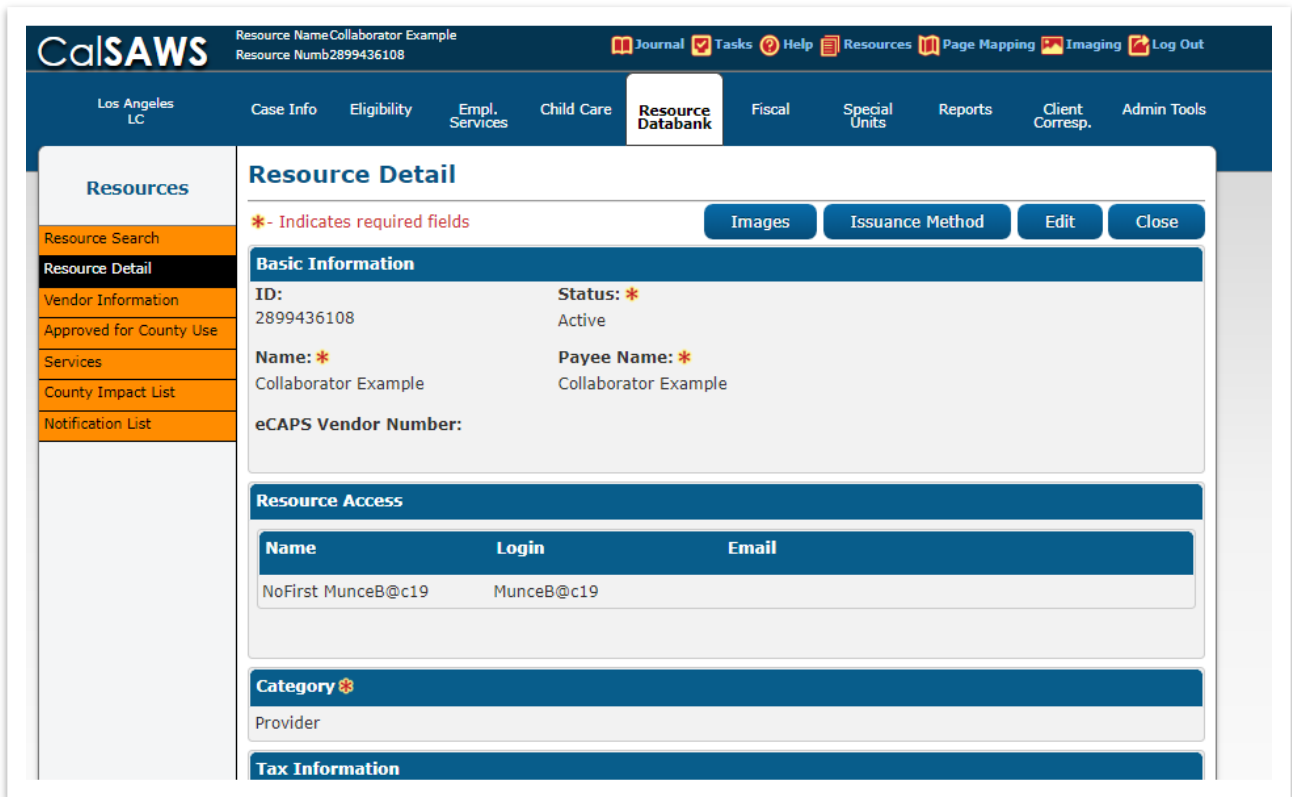


Figure 1.2-5 – Resources Detail Page

1.2.2 COLLABORATOR USER CALSAWS PAGES

When the collaborator logs in to CalSAWS, they will initially see the **Collaborator Resource List** page. This lists all resources to which they have been assigned in the *Resource Access* section via the process above.

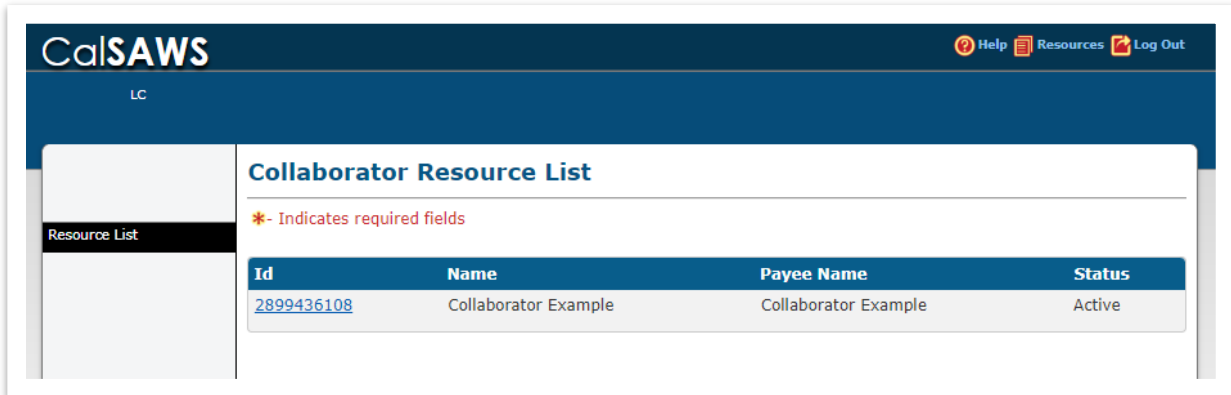


Figure 1.2-6 – Collaborator Resource List Page

From here, the collaborator can (via the link for a resource) access a subset of the information for the resource:

The screenshot shows the CalSAWS interface with a sidebar on the left containing 'Resource List', 'Basic Info', 'Services', and 'Job Orders'. The main content area is titled 'Resource Detail' and includes 'Edit' and 'Close' buttons. The data is organized into several sections:

- Basic Information:**
 - ID: 2899436108
 - Status: Active
 - Name: Collaborator Example
 - Payee Name: Collaborator Example
 - Category: Provider
 - Type:
 - Tax ID: 123456789
 - Tax Type: * Corporation - 1099 Exempt
- Addresses:**

Type	Address
1099 Mailing	12440 IMPERIAL HWY NORWALK, CA 90650-3177
Billing	12440 IMPERIAL HWY NORWALK, CA 90650-3177
Mailing	12440 IMPERIAL HWY NORWALK, CA 90650-3177
Physical	12440 IMPERIAL HWY NORWALK, CA 90650-3177
- Phone Information:**

Type	Number	Extension
No data found		
- Internet Information:**

Type	Address
No data found	

Figure 1.2-7 – Resource Detail Page