



CalWIN ISS

Implementation Support Services

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

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CalSAWS Implementation Support Services

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

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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.

CalSAWS Resource Name: Collaborator Example
Resource Num: 2899436107

Los Angeles LC

Case Info Eligibility Empl. Services Child Care **Resource Databank** Fiscal Special Units Reports Client Corresp. Admin Tools

Resources

Resource Search
Resource Detail
Vendor Information
Approved for County Use
Services
County Impact List
Notification List

Resource Detail

*- Indicates required fields

Images Save Cancel

Basic Information

ID: 2899436107 Status: * Active IVR PIN: Create PIN

Name: * Collaborator Example Payee Name: * Collaborator Example

eCAPS Vendor Number:

Resource Access

Name	Login	Email
No data found		

Type: Add

Category

☐ Agency
☐ Employer
☒ Provider
☐ School

Tax Information

Figure 1.2-1 – Resource Detail Page

- 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.

CalSAWS Identity Search

*- Indicates required fields

Search

Search By: *

Name ▼

Last Name: * First Name: * Middle Name:

Results per Page: 25 Search

Figure 1.2-2 – CalSAWS Identity Search Page

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

CalSAWS Identity Search

*- Indicates required fields

▼ Refine Your Search

Search By: *

Email ▼

Email:

munceb@calaws.org

Results per Page: 25 ▼ **Search**

Search Results Summary Results 1 - 1 of 1

Select Cancel

	Name	Login	Email
☐	B Munce	MunceB	MunceB@CalSAWS.org

Select Cancel

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:

The screenshot displays the CalSAWS Identity Search interface. At the top, the header includes the CalSAWS logo, user information (Resource Name: Collaborator Example, Resource Num: 2899436107), and navigation links (Journal, Tasks, Help, Resources, Page Mapping, Imaging, Log Out). Below the header, a secondary navigation bar lists various modules: Los Angeles LC, Case Info, Eligibility, Empl. Services, Child Care, **Resource Databank**, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools.

The main content area is titled "CalSAWS Identity Search". It includes a legend indicating that asterisks (*) denote required fields. A message states: "Login - MunceB is currently a Staff, please select another." Below this, there is a "Refine Your Search" section and a "Search Results Summary" table. The table shows one result for "B Munce" with the login "MunceB" and email "MunceB@CalSAWS.org". A radio button is selected next to the name. "Select" and "Cancel" buttons are present at the bottom of the results table.

Name	Login	Email
☒ B Munce	MunceB	MunceB@CalSAWS.org

Figure 1.2-4 – CalSAWS Identity Search Page

6. 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.

CalSAWS Resource Name: Collaborator Example
Resource Num: 2899436108

Journal Tasks Help Resources Page Mapping Imaging Log Out

Los Angeles LC Case Info Eligibility Empl. Services Child Care **Resource Databank** Fiscal Special Units Reports Client Corresp. Admin Tools

Resources

- Resource Search
- Resource Detail**
- Vendor Information
- Approved for County Use
- Services
- County Impact List
- Notification List

Resource Detail

* - Indicates required fields

Images Issuance Method Edit Close

Basic Information

ID: 2899436108 Status: * Active

Name: * Collaborator Example Payee Name: * Collaborator Example

eCAPS Vendor Number:

Resource Access

Name	Login	Email
NoFirst MunceB@c19	MunceB@c19	

Category *

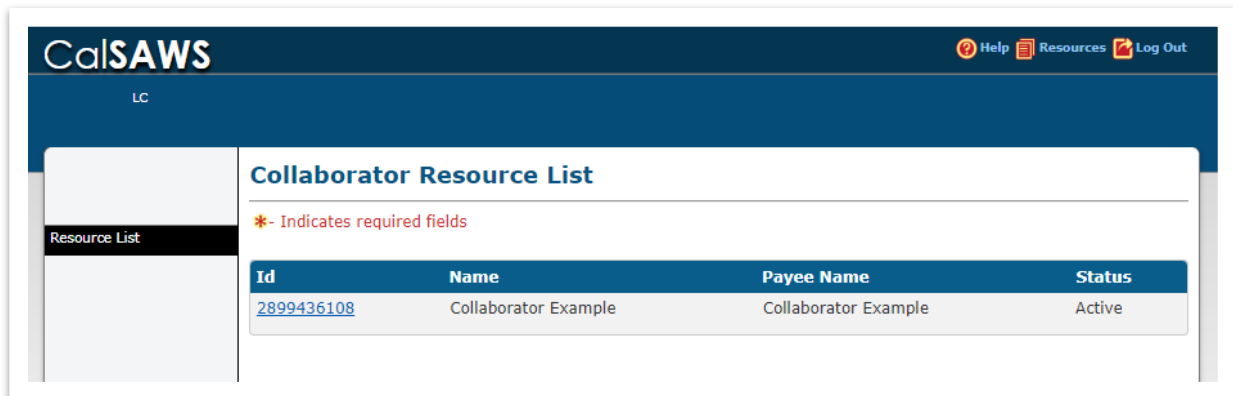
Provider

Tax Information

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.



Collaborator Resource List			
*- Indicates required fields			
Id	Name	Payee Name	Status
2899436108	Collaborator Example	Collaborator Example	Active

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:

CalSAWS Help Resources Log Out

LC

Resource Detail Edit Close

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