



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.

The screenshot displays the CalSAWS Resource Detail page. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Imaging, and Log Out. The left sidebar lists various resource management options. The main content area is divided into several sections: Basic Information (containing fields for ID, Status, IVR PIN, Name, Payee Name, and eCAPS Vendor Number), Resource Access (featuring a table with columns Name, Login, and Email, and a Type dropdown menu with options Active Directory and CalSAWS Identity), Category (with checkboxes for Agency, Employer, Provider, and School), and Tax Information. A red arrow points to the Resource Access section, highlighting the Type dropdown menu and the Add button.

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.

The screenshot shows the CalSAWS Identity Search page. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Imaging, and Log Out. The left sidebar lists various resource categories. The main content area is titled 'CalSAWS Identity Search' and includes a search form with the following fields: Search By (Name), Last Name, First Name, and Middle Name. A 'Search' button is located at the bottom right of the form. A legend indicates that an asterisk (*) denotes required fields.

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.

The screenshot shows the CalSAWS Identity Search page with search results. The search form is filled out with 'Email' selected as the search criteria and 'munceb@calaws.org' entered in the email field. The 'Search' button has been clicked, resulting in a 'Search Results Summary' section. This section displays a table with the following data:

Name	Login	Email
B Munce	[REDACTED]	Munceb@CalSAWS.org

Below the table, there are 'Select' and 'Cancel' buttons for each result. The 'Results per Page' dropdown is set to 25.

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:

CalSAWS Identity Search

*- Indicates required fields

- [Login](#) - MunceB is currently a Staff, please select another.

Refine Your Search

Search Results Summary Results 1 - 1 of 1

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

Select Cancel

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.

CalSAWS Resource Name: Collaborator Example Resource Number: 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

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.

CalSAWS LC

Help Resources Log Out

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