CalSAWS

CalWIN ISS

Implementation Support Services

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

February 3, 2023

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/21/22	.01	Original	Conversion Team
11/01/22	1.0	Wave 1 Go-Live	Deloitte
02/03/23	2.0	Republish – No change	ISS

TABLE OF CONTENTS

– 3 –

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

3. 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.

Figure 1.2-2 – CalSAWS Identity Search Page

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

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

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.

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:

Figure 1.2-7 – Resource Detail Page