

CARES-Live Manage Users Job Aid

Purpose

The purpose of this job aid is to show you how to:

- Add a User
- Access the User Profile page
- Edit a User Profile



Policy and Procedure Disclaimer:

CARES-Live training materials are designed to teach you how the system works. They do not cover policies and procedures specific to your organization, or general policy from the State about child welfare practice.

Manage Users Overview

The purpose of the CARES-Live Manage Users functionality is to give State, County, and Office Administrators the ability to add users, and edit the Status and Assigned Permissions of the individuals for whom they are responsible.

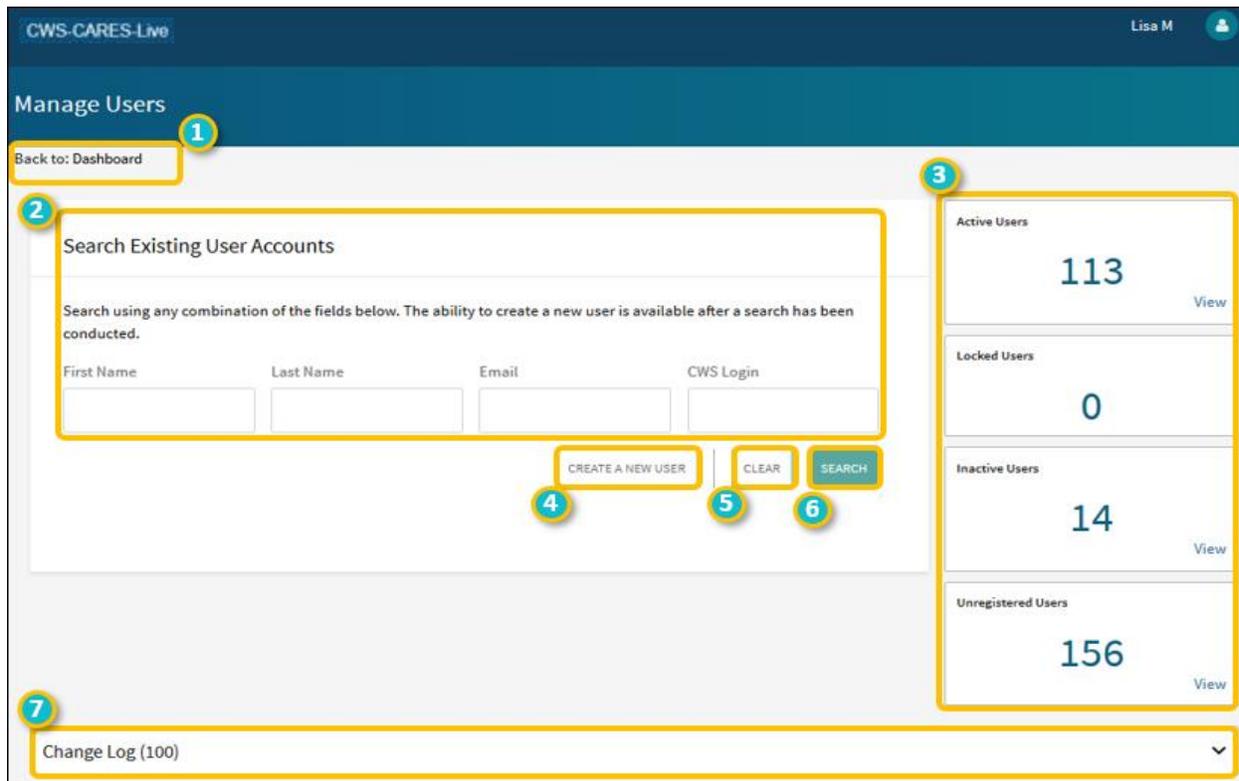


Note:

Only users who are specifically identified and assigned as Admin Users by the CWS-CARES project or by their County Administrators will be able to access the Manage Users tool.



Manage Users Page Elements:



The screenshot shows the 'Manage Users' page in the CWS-CARES Live system. At the top, there is a breadcrumb link 'Back to: Dashboard' (1). Below it is a search section titled 'Search Existing User Accounts' (2) with input fields for First Name, Last Name, Email, and CWS Login. Below the search fields are three buttons: 'CREATE A NEW USER' (4), 'CLEAR' (5), and 'SEARCH' (6). To the right of the search section is a 'Quick Filter Reports' panel (3) showing counts for Active Users (113), Locked Users (0), Inactive Users (14), and Unregistered Users (156), each with a 'View' link. At the bottom of the page is a 'Change Log (100)' dropdown menu (7).

#	Description
1	Breadcrumbs (links) at the top of the page allows you to return to the previous page.
2	Search Existing User Accounts using any combination of First Name, Last Name, Email, and CWS Login.
3	Quick Filter Reports provides a quick count of Active Users, Locked Users, Inactive Users, and Unregistered Users . Administrators can view a list of users from any of these links.
4	Create A New User option becomes available after a search is performed.
5	Use the CLEAR button to start a new search.
6	Use the SEARCH button to perform your search. Results will show exact and or similar matches.
7	Change Log on the Manage Users page displays changes for all users on your user list. Administrators have access to a user's profile from within the change log. Account lockouts and all phone number changes will be recorded in the change log. Only county and office administrators (not state admins) can see this change log.

Adding a User

Before adding a user, CARES-Live will verify that the user does not already exist in the system to prevent adding a duplicate user. Additionally, the user must be active in CWS-CMS to pass CARES-Live validation. Once a user has been added, CARES-Live will send a registration e-mail to the individual.

You cannot add the following users:

- Users whose e-mail address already exists in CARES-Live
- Users whose CWS login is not found in CWS/CMS
- Users from counties other than your own

CARES-Live will display an alert if you attempt to add one of these types of users.



Note:

It is important that you enter the user's correct e-mail address as this is where the registration e-mail will be sent. The e-mail entered also becomes their CARES-Live user ID and is used during the log in process.



To add a user:

Step	Action	Result
1.	From the Manage Users page, click CREATE A NEW USER button	The CREATE A NEW USER page displays the Verify User card.
2.	Enter CWS Login and Email Address .	CWS Login and Email Address display and the VERIFY USER button is now enabled.
3.	Click VERIFY USER .	The Add User page displays the Add User card with the suggested user's information.
4	Click ADD USER.	The read-only view of the User Profile page displays with an alert that says, " Successfully added new user. Registration email has been sent to [e-mail address] ".



Note:

A search must be performed before Create A New User option becomes available.

Verifying the User

When verifying the details of the CWS/CMS user you want to add to CARES-Live, you may realize it's not the correct user. In this case, you can remove and re-enter the CWS Login and/or Email Address and re-verify the user.



Note:

The registration e-mail is sent to the user as soon as you click ADD USER. Therefore, it is recommended that your next step is to assign the appropriate permissions. Otherwise, if the user registers and logs in before you assign permissions, they will see a blank dashboard.



User Profile Page Elements:

CWS-CARES-Live Lisa M

User Profile

Back to: Dashboard > User List

County: Madera

System Status: Unlocked

Full Name: S, Kristen Office Name: Kristen Office CWS Login: BK Role: Office Administrator

Email: cwsdkb@ic@gmail.com Office Phone Number: (916) 555- Start Date: 11/26/2016 Last Login: March 29, 2019 02:49 PM

Phone Number: 1234567890 Ext: 2 Cell Phone Number:

User Status: Confirmed (User has been confirmed.) Account Status: Active

Assigned Permissions: CANS, Facility Search & Profile, Hotline, RPA, Snapshot

Privileges from CWS-CM (18)

Category	Privilege
Access Authority	System Administration
Access Authority	Closed Case/Referral Update
Access Authority	Bulletin Administrator
Access Authority	Adoptions
Access Authority	Resource Mgmt Placement Facility Maint
Access Authority	Resource Management
Access Authority	Merge Client
Access Authority	Non-CWD Kin-GAP
Access Authority	Create Service Provider
Access Authority	County License Case Management
Access Authority	Program Management Reports
Access Authority	CWS Case Management System

Notes

Change Log (6)

Date/Time	Made By	Type	Details
June 12, 2019 03:19 PM	E, Leon (State Administrator)	Account Unlocked	VIEW
June 12, 2019 02:25 PM	R, Ratneah (County Administrator)	Worker Phone Change	VIEW
March 21, 2019 01:10 PM	R Reval (County Administrator)	Notes Changed	VIEW
March 21, 2019 01:09 PM	R Reval (County Administrator)	Notes Changed	VIEW
February 19, 2019 02:45 PM	S Bireder (County Administrator)	Email Address	VIEW
February 19, 2019 02:44 PM	S Bireder (County Administrator)	Email Address	VIEW

#	Description
1	Clicking RESET will reset the information on the page to the last saved information. Clicking SAVE saves any changes made on the page.
2	After 3 failed login attempts, a user will be locked out. You can unlock them simply by clicking Unlock User here. An alert will display that says, "Success! You have successfully unlocked this user." Please notify the user of this change."
3	You can select the appropriate Role for the user from this dropdown.
4	You can make any needed corrections to the user's Email here. The new email will immediately be available for use as the login for CARES-Live.
5	You can make any needed corrections to the user's Phone Number and Extension here. The phone number field is required to save, but the extension is not. Edits made in CARES-Live for this field are not sent back to CWS/CMS. In the same way, edits made to the phone number in CWS/CMS are not sent to CARES-Live.
6	You can enter user's Cell Phone Number .
7	You can select either Active or Inactive for the Account Status .
8	You can select a user's Assigned Permissions from this dropdown.
9	The number in parenthesis notates how many records are listed below. In this example, there are 18 Privileges from CWS-CMS.
10	Clicking on a caret (^) closes the section.
11	A blue line indicates that the column is selected. Click the column header to change the sort order. The blue line will either display above or below the column header depending on the sort order. The default sort is either alphabetical order (e.g. Category) or most recent (e.g. Date/Time) based on the first column in the section.
12	Here you can view the user's Privileges from CWS-CMS and their corresponding Category .
13	You can enter Notes up to 250 characters here.

<p>14</p>	<p>The Change Log displays the following information about changes, Date/Time, Made By, Type, and Notes & Details. The Change Log records account lockouts, phone numbers, email addresses, permission changes, notes, and active status for all users on your user list. County, Office, administrators can see this change log not state admins.</p>
<p>15</p>	<p>Clicking VIEW displays the Change Log Details including email addresses, phone numbers, permissions, notes, and active status changes.</p>

Accessing the User Profile Page



Note:

Active or Inactive status refers to access to CARES-Live only. Assigned Permissions, controls which services or features within CARES-Live a user will be able to access.



To access the User Profile Page:

Step	Action	Result
<p>1</p>	<p>From the Manager Users page, select the name of the user whose profile you want to view.</p>	<p>The User Profile page displays.</p>

Searching for a User

Your search results will have **Include Inactive** selected by default, deselect the box to get search results for active users only. You can search for more than one office name. Search results will show EXACT and or SIMILAR matches. Administrators may also see and unlock users from the Search Results.



New Concept: Quick Filter Reports

Administrators have a quick count and access to:

- Active users
- Locked users
- Inactive users
- Unregistered users

The pagination functionality is another way you can search for a user. It allows you to select how many rows or users per page you want to see in the user list and allows you to navigate from page to page. Pagination always displays above the user list. Pagination displays below the user list when you select **25 rows**, **50 rows** or **100 rows**. If you enter a page number or use the up/down arrows, click **Enter** on your keyboard to see that page. You can also use the left/right arrows to view pages.

Editing a User Profile

You can edit the Role, Email, Phone Number, Cell Phone Number, Account Status and Assigned Permissions. The other fields are view-only, and you cannot edit the information.



To edit a User Profile:

Step	Action	Result
1	From the Manage Users page, search for the name of the person whose profile you want to edit. You may also choose user from the quick filter reports.	The edit-view of the User Profile page displays.
2	Edit the following information as needed: Role , Email , Phone Number (including Extension), Cell Phone Number , Account Status , and Assigned Permissions .	Edited information displays.

3	Click SAVE.	Your changes are saved and now display on the User Profile page. An alert displays at the top of the page that says, " Your changes have been made successfully ".
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New Concept: Assigned Permissions

- In addition to selecting a permission from the dropdown, you can enter a known permission into the field. A list of matching permissions will display for you to select. As you enter more characters, the matching permissions displayed will narrow.
- Multiple permissions can be assigned to a user
- To remove an Assigned Permission, select X on the permission you want to remove
- A user must logout and sign in again to activate their new permissions.
- County Admin can edit other County Admins
- Office Admin can edit other Office Admins



Note:

Attempting to reset password more than seven consecutive times will lock user's account. CARES-Live Service Desk will need to be contacted to release this lock. If a user has *never* logged in, and their temporary password has expired after the 7-day time period, you can resend from the User Profile page. **User Status** will show **Registration Incomplete**.

RESEND INVITE

Click Resend Invite to send a new registration e-mail.

On Demand Training

Continue your learning experience by choosing from the following CARES-Live training materials available to you on demand:

Watch it!



Manage Users Demo Video

Access this video to watch processes in action!

CARES-Live Support

If you need help using CARES-Live, follow your organization's process for requesting assistance.

Is This Job Aid Helpful?

If you have questions or suggestions regarding this Job Aid please [send an e-mail to CWDS Implementation Training \(osicwdstraining@osi.ca.gov\)](mailto:osicwdstraining@osi.ca.gov).