

California Automated Response and Engagement System (CWS-CARES)  
Resource Family Application (RFA) Project



# **CWS-CARES Admin Training**

February 2022  
Module 11  
Version 4.0



## Revision History

Revision / Version #	Date of Release	Author	Summary of Changes
1.0		Barney Smith	Initial Draft
2.0	2/15/2022	Lori Savageau	ADA Review
3.0	3/2/2022	Barney Smith	Added Deactivate functionality
4.0	3/7/2022	Lori Savageau	Final ADA Revision and Review



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# **Module 11: CWS-CARES Admin Training**

## **Purpose**

Create and update user profiles, resend activation links and support resetting passwords.

## **Objectives**

After completing this lesson, you will be able to:

- Access the admin functions
- Create a new user
- Edit new user
- Resend activation link
- Support password reset

## **Prerequisites**

Prior to taking this module, you should have:

- Been given County Administrator access

## **Related Quick Guide(s)**

- County Admin Functionality

## **Introduction**

This module is designed to teach you how to access Admin functionality, create a new user profile for someone in your county, update a user profile, resend an activation link and support password reset.

# Lesson 1: Access Admin Functionality

## Demonstration Exercise

Please watch as the instructor demonstrates the steps of this exercise. You will have the opportunity to practice on your own later.

### Scenario

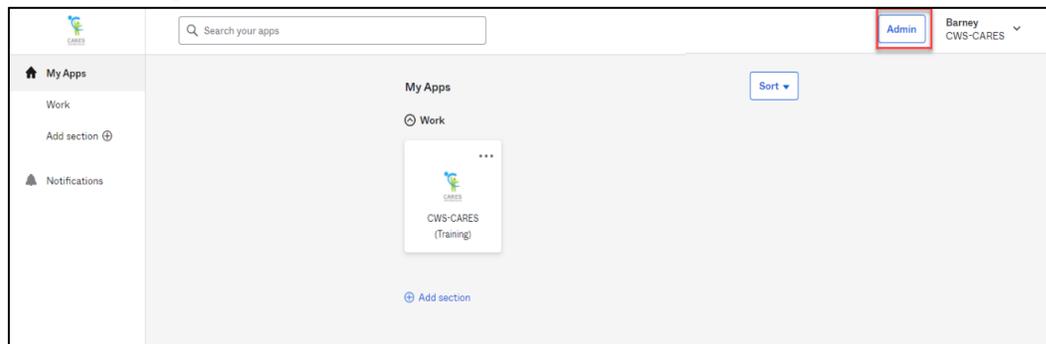
You are logging into CARES and will access the Admin functionality.

### Actions to complete this exercise:

- Login
- Access Admin functionality

After logging into CWS-CARES RFA, the **Landing** page displays.

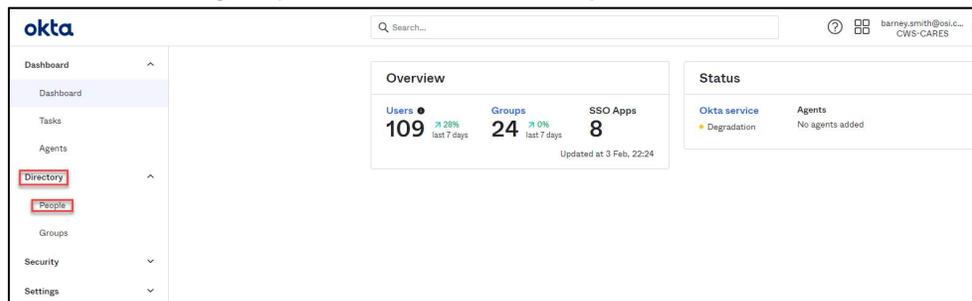
1. In the upper right-hand corner, click the **Admin** button.



The **Admin dashboard** displays.

**NOTE:** The dashboard will display metrics on users and groups. On the left is a pane that allows you to access various functions. You will be primarily using the Directory dropdown, which will give you access to people and groups. Let's take a look at the People option.

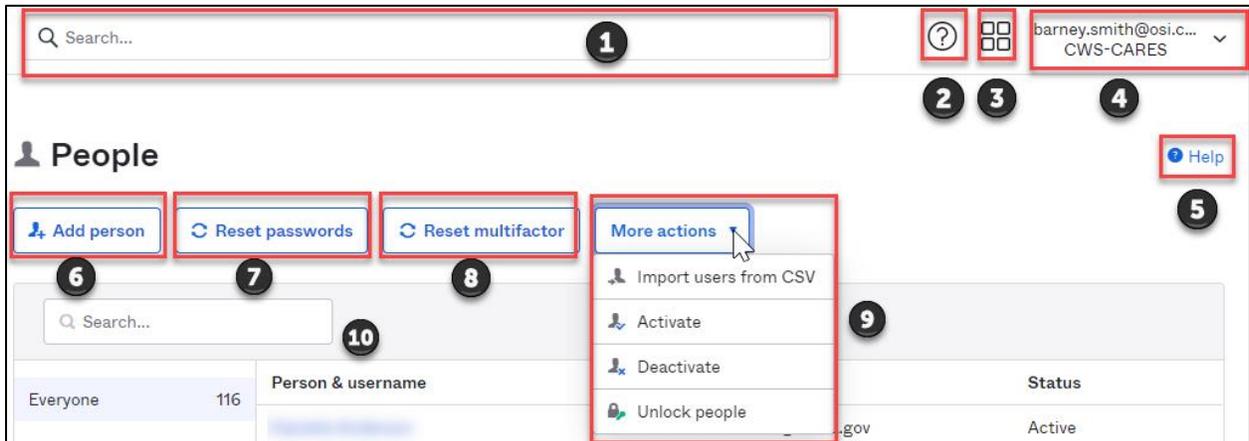
2. Click the **Directory** drop-down list and select **People**.



The **People** pane displays in the center of the page

The upper section of the page contains 10 different points of functionality:

1. **Search** – This search searches for both people and applications and is not something you would need to use.
2. The **question mark symbol** provides links to the Help Center, Help Documentation, Developer Documentation and Training.
3. The **pane icon** provides access to your Okta apps.
4. The **Name** dropdown provides access to your **Settings** and a **Sign out** option.
5. The **Help** link opens help specific to this page.
6. **Add person** allows you to add a new person to CARES.
7. **Reset Password** allow you to reset a user(s) password. **DO NOT USE THIS OPTION.**
8. Reset multifactor resets the user(s) extra verification setup so they can set it up again. **DO NOT USE THIS OPTION.**
9. **More actions** allow you to import users from a spreadsheet, Activate and Deactivate users and unlock people.
10. **Search** allows you to search for specific users.



The screenshot shows the 'People' management interface. At the top, there is a search bar (1), a help icon (2), a pane icon (3), and a user profile dropdown (4) for 'barney.smith@osi.c... CWS-CARES'. Below the search bar, there are three buttons: 'Add person' (6), 'Reset passwords' (7), and 'Reset multifactor' (8). To the right of these buttons is a 'More actions' dropdown menu (9) containing options: 'Import users from CSV', 'Activate', 'Deactivate', and 'Unlock people'. A 'Help' link (5) is located in the top right corner. Below the buttons, there is another search bar (10) and a table with columns for 'Person & username' and 'Status'. The table shows a user with the email '.gov' and status 'Active'.

**NOTE:** The bottom section of the page is divided into two sections. The left side allows you to filter users you are viewing. The right side displays the users **Person and username**, **Primary email**, and **Status**. The status is what you will use to help determine what actions need be taken. For example, an **Active** status means the person is active in the system, while **Pending user action** indicates that the person has been set up, but has yet to follow the activation steps.

Filter	Count	Person & username	Primary email	Status
Everyone	116			
Onboarding				
Staged	1			
Pending user action	28			
Active	87			
Active				Active
Password reset	0			
Locked out	0			
Inactive				Active
Suspended	0			
Deactivated	0			Active

First, we'll explore how to set up a person in the system.

## Add Person

1. Click the **Add person** button.



The Add Person page displays.

2. In the **User type** accept the default of **User**.
3. **First name** — Enter the *user's first name*
4. **Last name** — Enter the *user's last name*
5. **Username** — Enter the *user's user name in email format*. This **MUST** be in all lowercase

**NOTE:** In production the user name will be their email address. For training ONLY we will use a different name.



6. **Primary email** — Enter the *user's primary email* if it's different from their username. This **MUST** be in all lowercase
7. **Secondary email** — Optional. Enter a secondary email to allow the user to access information when their primary email is unavailable
8. **Groups** — Enter the groups to which the user belongs. For example, if you are the Fresno County Administrator, you would begin typing in the word Fresno, then select the Fresno\_County\_Users group when it displays.
9. **CARES User Type** – Click the drop-down and select the **User Type**, such as County Employee/Contractor or whatever is appropriate for that user.
10. **CARES User From** – Click the drop-down and select the **appropriate entry** (for example, Fresno)
11. **Password** — Select **Set by user** to allow the user to set their password. Leave this as default.
12. **Send user activation now** - This check box is available when **Set by user** is selected as the password option. **DO NOT** select this check box to send a user activation email to the user as the system will automatically send it later in the process
13. Click **Save** or click **Save and Add Another** to add another user.

The screenshot shows the 'Add Person' form with the following fields and callouts:

- 1. User type (dropdown menu)
- 2. First name (text input)
- 3. Last name (text input)
- 4. Username (text input with error message 'Must be an email')
- 5. Primary email (text input)
- 6. Secondary email (optional) (text input)
- 7. Groups (text input with note: 'You must assign this user to at least one group that you administer')
- 8. CARES User Type (dropdown menu)
- 9. CARES User From (dropdown menu)
- 10. Password (dropdown menu)
- 11. Send user activation email now (checkbox)
- 12. Save, Save and Add Another, and Cancel buttons

**NOTE:** The process we just completed set the user up in Okta. There is one more step that you need, and that is to assign the persona (clerical, worker, supervisor or program manager). This gives them access to the application and generates the activation email. You will need to edit the profile to do that.

## Edit a Person's Profile

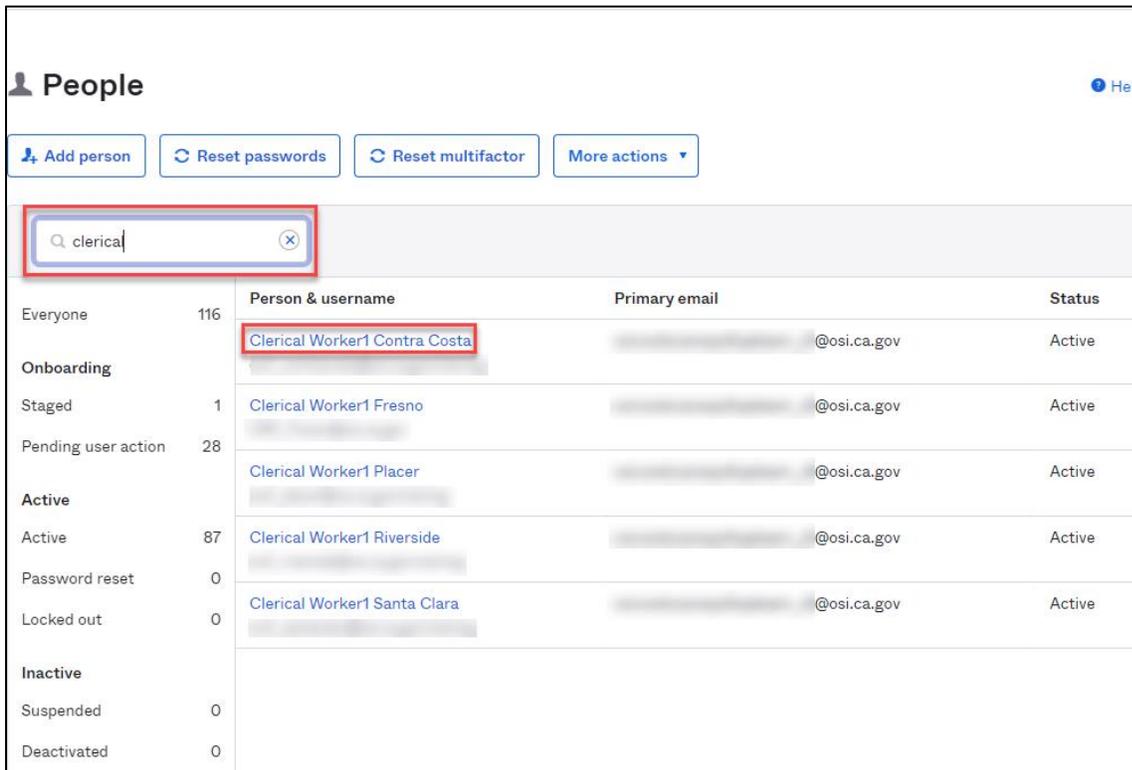
This section will explore how to search and edit a person's profile. We'll begin on the People page.

The People page displays

1. Click in the **Search** field and begin typing the *person's name*.

As you type the system will narrow down the names to match your entry. In this example I used the name of the record I just created.

2. Click on the **Name** link.

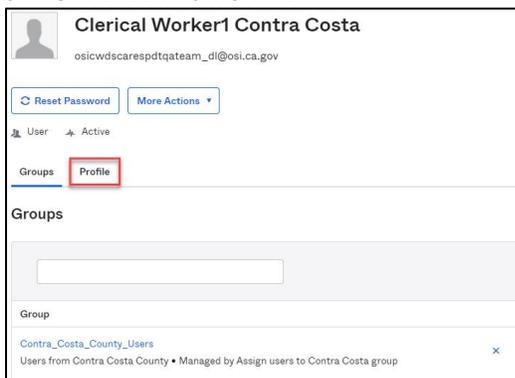


The screenshot shows the 'People' management interface. At the top, there are buttons for 'Add person', 'Reset passwords', 'Reset multifactor', and 'More actions'. A search bar contains the text 'clerical'. Below the search bar is a table with columns for 'Person & username', 'Primary email', and 'Status'. The table is filtered by 'Onboarding' status. The first result, 'Clerical Worker1 Contra Costa', is highlighted with a red box. Other results include 'Clerical Worker1 Fresno', 'Clerical Worker1 Placer', 'Clerical Worker1 Riverside', and 'Clerical Worker1 Santa Clara'. The table also shows counts for various categories like 'Everyone' (116), 'Staged' (1), 'Pending user action' (28), 'Active' (87), 'Password reset' (0), 'Locked out' (0), 'Suspended' (0), and 'Deactivated' (0).

Category	Count	Person & username	Primary email	Status
Everyone	116			
Onboarding		Clerical Worker1 Contra Costa	@osi.ca.gov	Active
Staged	1	Clerical Worker1 Fresno	@osi.ca.gov	Active
Pending user action	28	Clerical Worker1 Placer	@osi.ca.gov	Active
Active	87	Clerical Worker1 Riverside	@osi.ca.gov	Active
Password reset	0	Clerical Worker1 Santa Clara	@osi.ca.gov	Active
Locked out	0			
Inactive				
Suspended	0			
Deactivated	0			

The user profile displays defaulting to the Groups tab

3. Click the **Profile** tab.



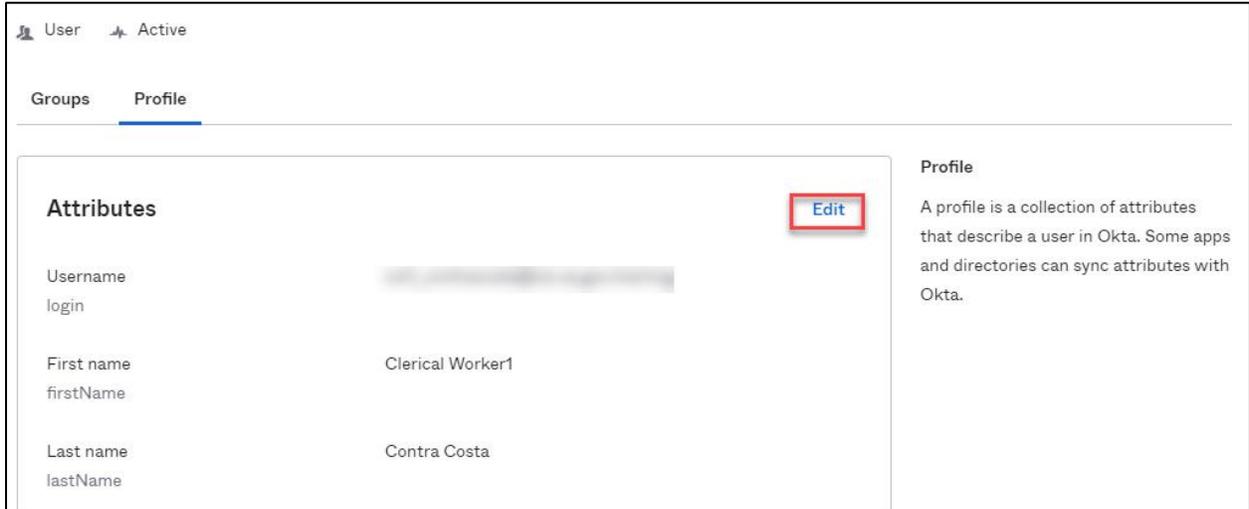
The screenshot shows the user profile for 'Clerical Worker1 Contra Costa'. The user's email is 'osicwdscarespdqtgateam\_dl@osi.ca.gov'. There are buttons for 'Reset Password' and 'More Actions'. The user is identified as 'User' and is 'Active'. Below this, there are tabs for 'Groups' and 'Profile', with 'Profile' selected and highlighted with a red box. Under the 'Groups' tab, a group named 'Contra\_Costa\_County\_Users' is listed, with a description: 'Users from Contra Costa County • Managed by Assign users to Contra Costa group'.

The Profile tab displays.

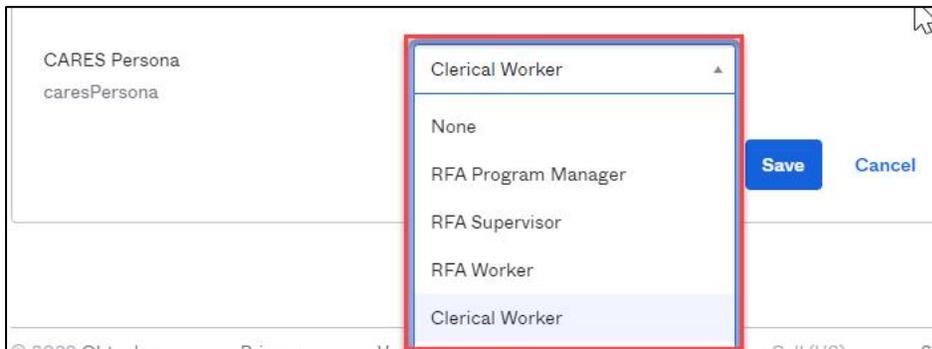
We will go into the profile and assign the persona for the profile we created; this is the same path you would take to update any of the profile information.

1. On the right-hand side, click the **Edit** link.

The page is now editable.



2. Scroll to the bottom of the page. This is where you would assign the personas.
3. Select **CARES User Type**.
4. Select **CARES User From**.
5. Click **CARES Access (Salesforce)** dropdown and select **option**.
6. Click the **CARES Persona** dropdown list and select **appropriate value**.
7. Click **Save**.



**NOTE:** This is the same process (clicking the Edit link) to update any information in the profile that might be incorrect or needing an update. **Once you click save, the user will be sent an activation email.**

## Resending an Activation Link

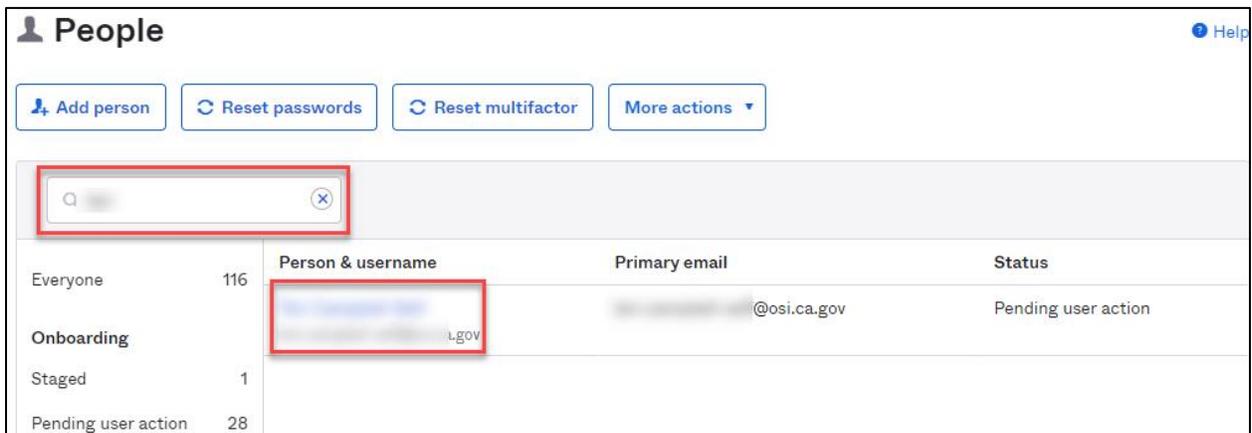
A user may not promptly activate their account, and after 7 days, the activation link will expire. If this happens, you will need to resend the activation link. Let's begin on the People page.

The People page displays

1. Click in the **Search** field and type the *name of the person*.

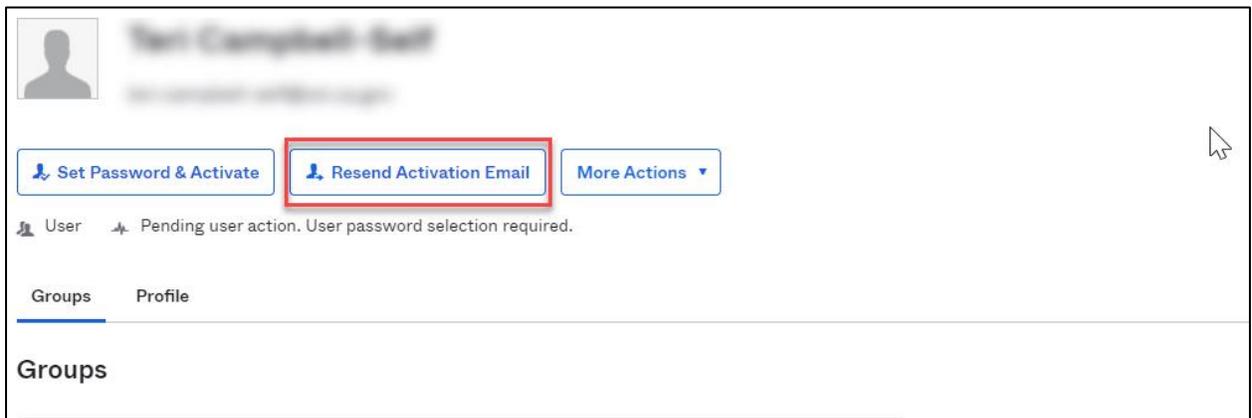
**NOTE:** The system will narrow the search down to that person and display the Person and username link. The status should be **Pending User Action**.

2. Click the **Person and username link**.



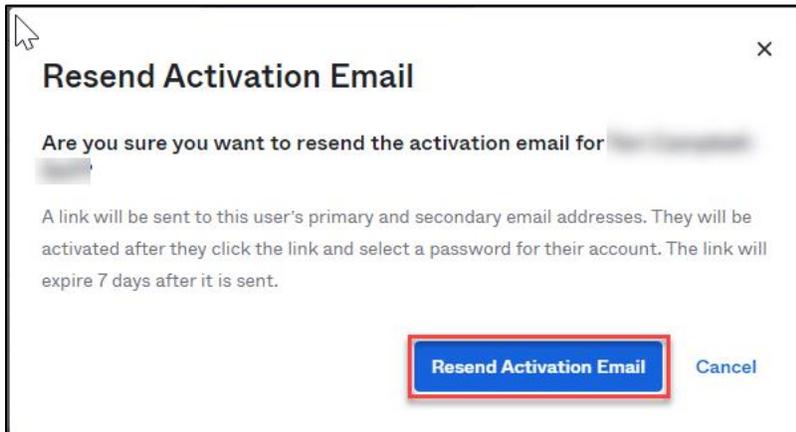
The individual's profile page displays

3. Click the **Resend Activation Email** button.



The Resend Activation Email pop-up displays.

4. Click the **Resend Activation Email** button.



The system will now send a new reactivation email with another 7-day limit.

## Resetting a Password

There may be times when a user forgets their password. As an admin, you only get involved in certain situations.

1. If the user locks themselves out by enter the wrong password repeatedly, they can wait for 30 minutes. The account will be automatically unlocked and the user can try again to sign in.
2. The user can use the forgot password link on the login page to reset their password (They do NOT have to wait for 30 mins). The user must remember the security question and answer challenge and should have access to email.
3. The user can call the County support (County Admin) to request reset password for their account. The administrator can send the reset password link to user's email address. The user should have access to email. We will cover this process in this section.
4. If the user does not remember the security challenge question answer, the only option is to reset the password by administrator (County Admin) and share the temporary password with the user. There should be an additional verification process before sharing the temporary password. This process will not be covered in this training.

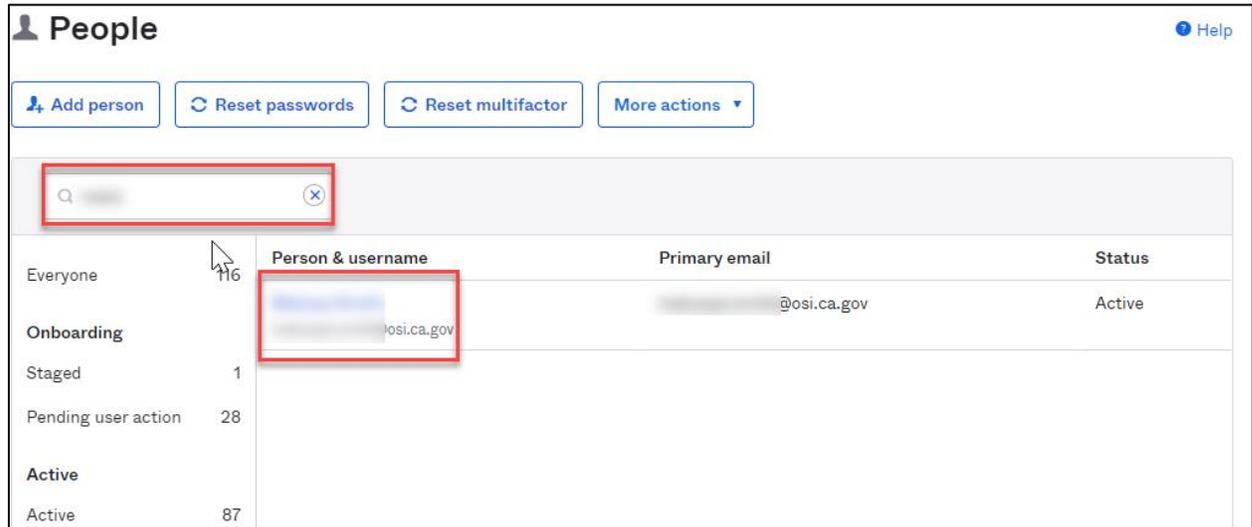
Let's review the process for sending the Reset Password link to a user.

Begin on the [People](#) page.

1. Click in the **Search** field and type the *name of the person*.

The system will narrow the search down to that person and display the Person and username link. The status should be **Active**.

2. Click the **Person and username link**.



The individual's profile page displays

3. Click the **Reset Password** button.

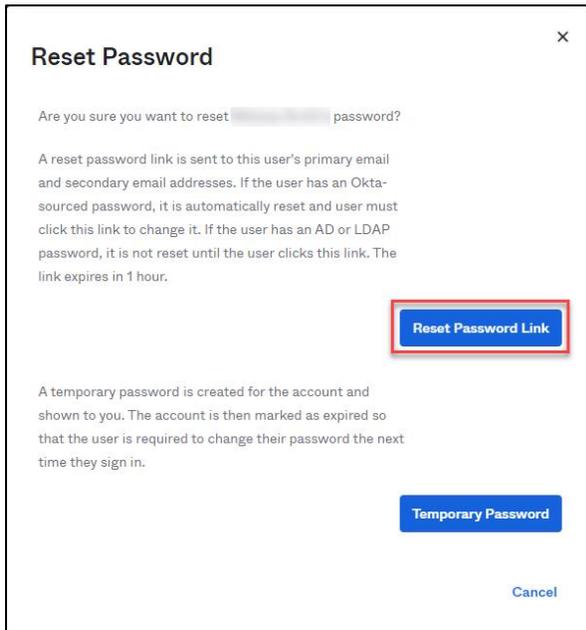


The [Reset Password](#) page displays

**NOTE:** This is the page where you can send the Reset password link. You can also set a temporary password; however we do not want to use this option at this time as it will require additional security measures. If you are in a situation where you feel you need to use this, please discuss with your supervisor and the State Admin.

For our purposes, we will use the Reset Password link.

#### 4. Click the **Reset Password Link**.



An email will now be sent to the user allowing them to reset their password using the **Set New Password** button embedded in the email. The system will default back to the User record.

The user record displays.

**NOTE:** The Reset Password button has now changed to Resend Password Email and there is a message underneath that says "Password reset. User is now in one-time password mode."



## Deactivating a User Profile

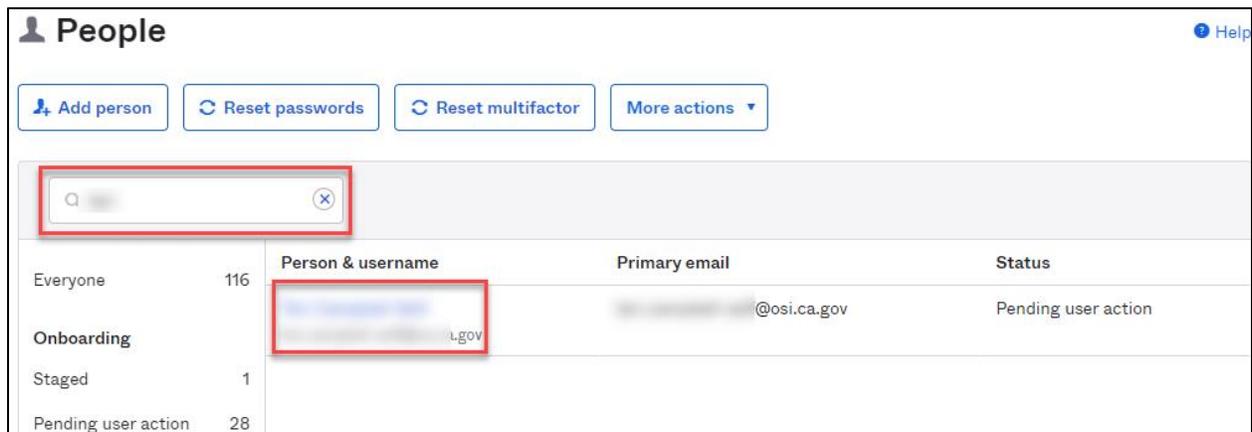
If a user's access needs to be deactivated, it is a straight-forward process. Let's begin on the People page.

The People page displays

1. Click in the **Search** field and type the *name of the person*.

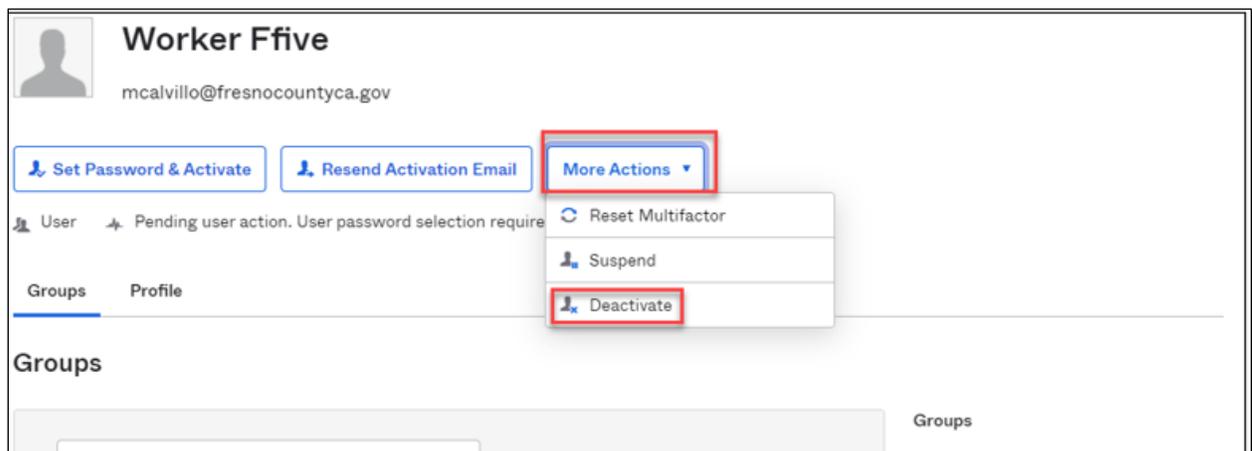
**NOTE:** The system will narrow the search down to that person and display the Person and username link.

2. Click the **Person and username link**.



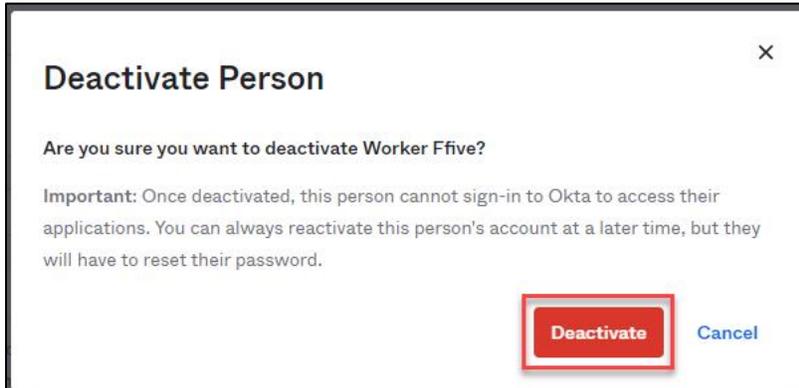
The individual's profile page displays

3. Click the **More Actions** dropdown arrow.
4. Select **Deactivate**.



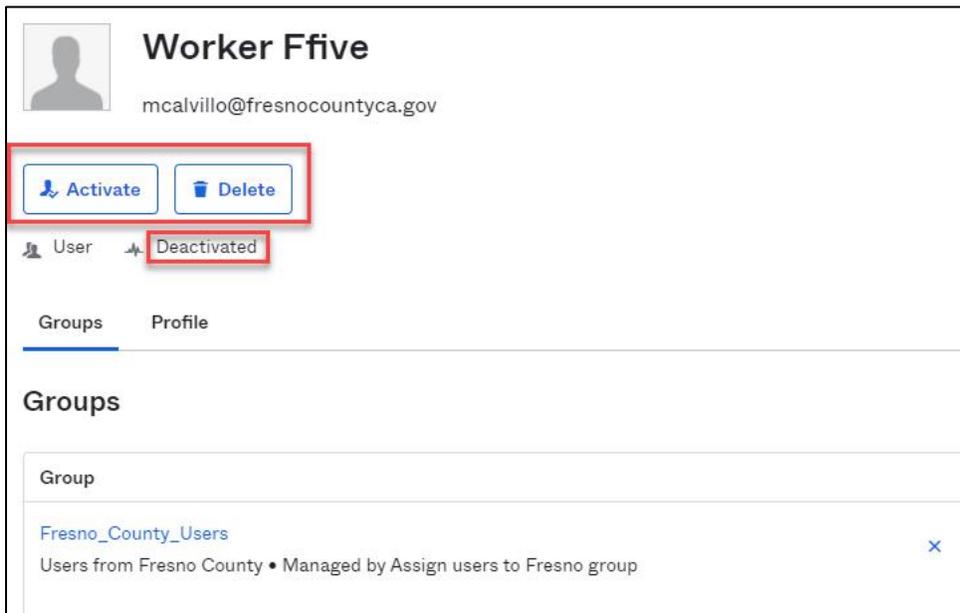
The Deactivate Person pop-up page displays

5. Confirm you want to deactivate this person and click **Deactivate**.



The individual's profile page displays.

The buttons at the top change to **Activate** and **Delete** and the **User** shows **Deactivated**.



Congratulations! You have reached the end of **Module11: Admin Training**.