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

Admin Training Quick Guide

To be used with **Module 11: CWS-CARES Admin** Participant Guide

May 2022
Quick Guide 11
Version 5

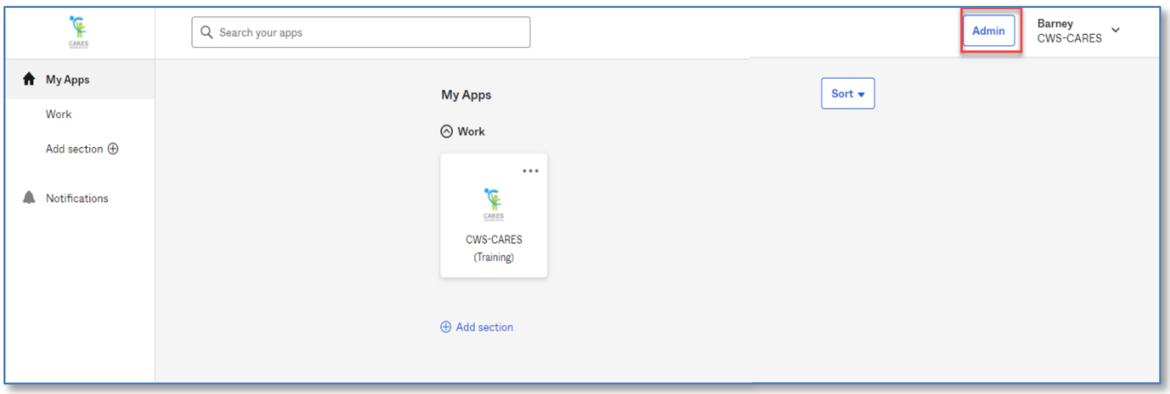
Revision History

Revision / Version #	Date of Release	Author	Summary of Changes
1.0	02/15/2022	Barney Smith	Initial Draft
2.0	02/16/2022	Melissa Smith	ADA Compliance Check
3.0	2/23/2022	Lori Savageau	ADA Revision and Final Review
4.0	3/2/2022	Barney Smith	Added Deactivate section
5.0	3/4/2022	Lori Savageau	Final ADA Revision and Review

CWS-CARES Admin Training

Login as an Admin:

1. Login.
2. Click the **Admin** button in the upper right-hand corner to display your admin functionality.



Add a New Person:

1. In the left pane select **Directory**.
2. Select the **People** option. – The **People** page displays.
3. Click the **Add Person** button. – The **Add Person** page displays.
4. Select system default of **User**.
5. Enter **First Name**.
6. Enter **Last Name**.
7. Enter **Username** in email format. Must be in lower case.
8. Enter **Primary Email**. Must be in lower case.
9. Type in **User Group** (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.)
10. Select the **CARES User Type**.
11. Select the **CARES User From**.
12. Ensure **Password** selection is **Set by user**.
13. **DO NOT** select **Send user activation now checkbox.**
14. Click **Save**. – The **People** page displays.
15. Click in the **Search** field and search for **new person's name**.

16. Select user's **Name** link. – The Individual's page displays, defaulting to the **Group** tab.
17. Click **Profile** tab. – The **Profile** tab displays.
18. Click **Edit** link on upper right-hand side.
19. Scroll to bottom:
    a) Select **CARES User Type**
    b) Select **CARES User From**
    c) Click **CARES Access (Salesforce)** dropdown and select **option**
    d) Click the **CARES Persona** dropdown list and select **appropriate value**
    e) Click **Save**
20. Once you have saved, the activation email is sent automatically to the user.

Resend 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.

1. Click in the **Search** field and search for **new person's name**.
2. Select user's **Name** link. – The individual's page displays, default to the **Group** tab.
3. Click the **Resend Activation Email** button.

Reset a Password:

If a user forgets their password, use this process. Begin on the **People** page.

1. Click in the **Search** field and search for **new person's name**.
2. Select user's **Name** link. – The individual's page displays, defaulting to the **Group** tab.
3. Click the **Reset Password** button. – The **Reset Password** page displays.
4. Click the **Reset Password Link** button.

Deactivate and Account:

To deactivate an account, use this process. Begin on the **People** page.

5. Click in the **Search** field and search for **new person's name**.
6. Select user's **Name** link. – The individual's page displays, defaulting to the **Group** tab.
7. Click the **More Actions** dropdown list and select **Deactivate**.
8. On the **Deactivate Person** pop-up page, click **Deactivate**.