

## **CWS/CMS WEB SITE COUNTY LOGON AREA USER GUIDE V.5**

The County Logon Area (previously known as County Specific Area) provides Counties the ability to maintain and update their own County Contact List information and access County specific reports, documents and Applications. This section is password protected and has been divided into secure “Areas of Access” and can only be viewed by those authorized and given access by the County Single Point of Contact (SPOC) and the Project Office, System Support Consultant (SSC).

Every County SPOC is given Administrator privileges that will allow them to update or change their County Contact pages. Administrators can also create and delete users, as well as specify their areas of access. SPOC authorized users are permitted to enter specified County Logon areas and make updates or changes as authorized. Only those with SPOC or Web Administrator rights can create or delete other users. It is each County’s responsibility to assign appropriate staff access and to keep County editable information current. Your CWS/CMS SSC can help you with any questions regarding functionality.

### **LOGON INSTRUCTIONS**

- Log on using your email address and password.
  - Note: All fields are required for new County Logon users. Although completing the *Phone* text field was not mandatory for previous existing users, if it is blank they will be prompted to complete it each time they log on.
- If you are successful you will see a screen notification that you have successfully logged in. All links you have access to in this area are displayed on the left side of the web page. **You will not see areas of access for which you do not have authority.** If you click on any of the primary navigation tabs above, you will be redirected out of the secure County Logon area.
- Please contact your County SPOC or SSC if you do not know your password and need it re-set.
- Please change your password the first time you log in. See “USER RE-SETTING THEIR OWN PASSWORD” below.
- Checking the “Keep me signed in” box activates a cookie that, on the same workstation, eliminates the need to log back into this secure area for 14 days. If for security reasons you later wish to cancel this cookie, click on the Log Out link.

### **User Admin:**

- Password
  - USER RE-SETTING THEIR OWN PASSWORD
    - In the “User Admin” area on the left click on the “Password” link.

- In the Password Changing Station screen highlight or delete your entire password field. Enter a new password. Click the “Change” button, which will change your password.
- ADMINISTRATOR RE-SETTING ANOTHER USER’S PASSWORD.
  - Under “User Admin” click on “New/Delete” (Visible only if you have Web Admin rights).
  - Click on the User’s Name, which causes their identifying information to populate the text fields.
  - Highlight or delete the User’s entire password field. Enter a new password. Click the “Submit” button, which will change their password. (The User should then log in and set a secure password.)
- New/Delete
  - CREATING A USER and Setting areas of access.
    - Under “User Admin” click on “New/Delete” (Visible only if you have Web Admin rights).
    - To add a new user, use the default screen, or click Add A New User. Enter the *User Name*, *Email Address*, *Phone* number and a *Password*.
    - All users created have access to secure read areas: General Information, Guides, and Oversight Committee. If you want a user to have Write Access, check the authorized areas. These are described below in Applications and Web Admin sections, and one or more boxes can be checked: Web, CFP, SAS, DDR, Switch, Training, MAC, SOTRS, SBC, and APD. Users will not have links or right to use to areas of access they do not have authority in.
    - Click on the “Submit” button.
      - If you have not completed all required text fields, a dialog box will notify you. Click OK and you will be returned to Create New User screen to complete the text fields.
    - The system will display that the person has been added and they will now be included in the table with their information and privileges.
  - Changing Areas of Access for existing user.
    - Under “User Admin” click on “New/Delete” (Visible only if you have Web Admin rights).
    - Click on the User’s Name, which causes their identifying information to populate the text fields.
    - All County Logon users have access to secure read areas: General Information, Guides, and Oversight Committee. If you want a user to have Write Access, check the authorized areas. These are described below in Applications and Web Admin sections, and one

or more boxes can be checked: Web, CFP, SAS, DDR, Switch, Training, MAC, SOTRS, SBC, and APD.

- Click on the “Submit” button.
  
- **DELETING A USER**
  - Go to the “User Admin” area and click on “New/Delete” (Visible only if you have Web Admin rights).
  - This will bring up the User Creation Screen. Click on the User that you would like to Delete, and click on the “Delete” button.
  - The system will display that the name has been deleted and they will no longer be displayed in the table.

## **APPLICATIONS**

Within the *Applications* section are web-based applications that are used by County Customers to provide information or make certain requests. As additional applications are added explanatory Desk Guides will be provided.

- County Annual Planning Estimates or CAPE (Visible only with “CFP” Area of Access rights)
  - See the Desk Guide linked from the top, right of the first page of CFP, as well as various CFP related documents in the Guides section described below. Additional CFP related guides are in the public web area under Projects tab > County Funding Process
- CWS/CMS Advance Planning Document Process or APD Process (Visible only with “APD” Area of Access rights)
- This web page gives County users access to documents, guides, and tools to assist the counties in preparing and submitting APDs as well as to minimize revisions that occur during the State review process.
  
- Data Deletion Reports (Data Deletion Request – Visible only with “DDR” Area of Access rights)
  - Only users with the privilege to this area will be able to submit on-line Data Deletion Request forms.
  - See DDR Users Guide posted on the Guides section of County Logon area.
  
- Equipment Relocation (Visible only with “Switch” Area of Access rights)
  - When a dedicated county needs a DTS switch port activated for a CWS/CMS device (workstation or printer) that needs to be moved from one site to another or to meet other legitimate business needs, the SPOC or their designee completes and submits the Equipment Relocation Request (ERR) form via the CWS/CMS web site.
  - For a detailed description of this process see the links on ***Additional Information*** on the *Equipment Relocation Request System* page.

- SAS (Visible only with “SAS” Area of Access rights)
  - For information on the SAS ID Process refer to the information guides linked from **Additional Information** on the *SAS ID Request System* page.
  - This initial SAS Application page shows valid SAS IDs that your County has. The current Vendor contract limits the number of SAS IDs to 22 statewide.
  - If your County wishes to request assignment of one of these IDs press the “**Request New ID**” button. Complete all the fields on the on-line *Request New SAS ID* page and click the “**Submit**” button. The Project Office will contact you.
  - If your County changes SAS users or information for a current SAS ID, click the **Edit** link, and subsequent Edit button. Complete and “**Submit**” changes.
  
- Training (Visible only with “Training” Area of Access rights)
  - This area provides access to statewide training support tools, and materials, including the STAR, On-Line Release Notes, Quick Reference Guides, On-Line Registration and the standard training curriculum.
  
- SBC (Visible only with “SBC” Area of Access rights)
  - – Gives user the ability to perform administrative functions for SBC.
  - For detailed information select the Application user guide icon to access the on-line SBC User Guide.
  
- Move Add Change or MAC (Visible only with “MAC” Area of Access rights)
  - – Only users with the privilege to this area will be able to submit an on-line MAC request.

### **General Information**

- Full Utilization Reports
  - As of this preparation of this document the latest posted reference available is the 05-04-06 bulletin *County Full Utilization for CWS/CMS Application*.
  - This County Specific report is updated monthly. See contact information on the webpage if you need historical data.
  
- Optimistic Concurrency
  - This County Specific report is updated weekly, although you can call up reports for prior or extended time periods.
  - Refer to the document “What is an Optimistic Concurrency Error (Host 0002)” posted in *Resources tab > Guides > CWS/CMS Application > General User*.
  
- QLAN

- This County Specific report is updated monthly, although you can call up reports for prior time periods.
- For detailed information refer to the 05-11-07 bulletin, *New Qlan Web Application*.
- System Change Request (SCR)
  - Web links related to the CWS/CMS Change Process are on this page, including County Specific System Change Request (SCR) Policy, SCR FAQs, SCR Site (WebRTS/SCR site), and CWS/CMS System Change Request Form.
    - Co-existent Counties need to have their firewall and port settings adjusted to access the WebRTS/SCR site. If they do not have these settings correct they will not be able to get to it. Co-Existent County I.T. is responsible to adjust the firewall & Port settings for their County. If assistance is needed County I.T. can open a ticket with the DTS Service Desk for assistance.
    - If Dedicated Counties cannot access the WebRTS/SCR site, they should open a ticket with IBM Boulder. IBM will work with DTS and/or State Web team to resolve it.
- xTools
  - The xTools suite is a set of programs to help users understand and work with the CWS/CMS database. The xDatabase tool may be helpful in providing explanations of the fields found in the CWS/CMS database or in determining where in the CWS/CMS application a particular field lies.
  - For detailed information select the xtools hyperlink for instructions.

### **Guides**

This area is available to all users with a County Logon ID. It contains guides related to the County Logon area, and technical and setup guides that Counties may not want accessible to all County CWS/CMS Users.

### **Oversight Committee**

This area, available to all users with a County Logon ID, is used for informational postings regarding the CWS/CMS Governance meetings, including Oversight Committee, and the PIAC and TAC sub-committees.

### **User Admin**

See page one of this document.

### **Web Admin**

(Visible only with "Web" Area of Access rights)

Each County is able to update their County Contact and related lists on the Web site. It is important that these are kept updated as other County and Project staff and Vendors

look here for the most current contact information. Once in the County Logon area you can update and change posted information by clicking first on the *Web Administration* link under the County Information sidebar. Once selected, a *Web Administration* section (right sidebar) is in view with sub-headings and links for different administrative functions. Provided below is a description of each of these Web Administrative functions.

- Edit CWS Contacts
  - To read a description of each of these Contacts hover your cursor over the Contact title and click. When hovering the cursor will change, adding a question mark and the Contact title will change color and show an underline. Clicking at this time will bring up a Message dialog box with a description of that Contact title.
  - Enter complete contact information here for your County Director, SPOC, Technical Contact, Training Coordinator and E-Mail Administrator.
    - The SPOC field contains a text field titled *Alternate and Backup Phone*. Click on this text field title for a description of what to enter here.
    - The CWS/CMS Project Office generates group email lists using the email text field information from this County entered data. If you wish to have these group emails sent to two different addresses in your county you may enter two addresses in the SPOC or Tech Point of Contact email address text box. Separate the email addresses with a **semicolon** and **space**, e.g. spoc1@county; spoc2@county
  - Click the “*Save Changes*” button each time you make an entry or update. Each Contact type (Director, SPOC, etc.) must be saved individually by clicking the “*Save Changes*” button in that box. Multiple Contact types cannot be entered and changed cumulatively.
  - These changes are live and will be reflected immediately.
  - SSC contact information is updated by Project Office staff.
- Edit Probation Contacts
  - To read a description of each of these Contacts hover your cursor over the Contact title and click. When hovering the cursor will change, adding a question mark and the Contact title will change color and show an underline. Clicking at this time will bring up a Message dialog box with a description of that Contact title.
  - Enter complete contact information here for your Probation Chief, Probation SPOC, Probation Technical Contact, and Probation Training Coordinator.
    - The Probation SPOC field contains a text field titled *Alternate and Backup Phone*. Click on this text field title for a description of what to enter here.
    - The CWS/CMS Project Office generates group email lists using the email text field information from this County entered data. If you

wish to have these group emails sent to two different addresses in your county you may enter two addresses in the Probation SPOC or Probation Tech Point of Contact email address text box.

Separate the email addresses with a **semicolon** and **space**, e.g. spoc1@county; spoc2@county

- Click the “*Save Changes*” button each time you make an entry or update. Each Contact type (Chief Probation, Probation SPOC, etc.) must be saved individually by clicking the “*Save Changes*” button in that box. Multiple Contact types cannot be entered and changed cumulatively.
  - These changes are live and will be reflected immediately.
- SSC contact information is updated by Project Office staff.
- Inter-County Contact List
  - Description Alerts are available for each of these Contacts types by hovering and clicking your cursor, as described above in the Edit Contact List section.
  - In the “Add New” box enter Contact Name, Phone and Email information. Select the Drop-down for *State ID Contact*, *ICT Contact* or *ICPC Contact*, **Probation IT Emergency Contact, and IT Emergency Contact, Aftercare Provider Contact (ACP).**
  - Click the “*Add New*” button.
  - To remove an incorrect or out-of-date ICT, ICPC or State ID Contact, click on the “*Delete Person*” button right below that Contact information.
  - These changes are live and will be reflected immediately.
- Site List (CWS Administrators Only)
  - On the County Site Administration page description Alerts are available for each of the data entry areas by hovering and clicking your cursor, as described above in the Edit Contact List section.
  - Each Site ID Number as designated by the CWS/CMS Project Office appears separately, with data entry fields to be completed uniquely for that site.
    - In the *Contact Information* section enter the County designated *Site Name*, *Contact* person and Contact’s *Phone* number. The *Contact* information entered in this field is for whom to contact to address network-identified issues at this site during *Business Hours*. The address information is not County-editable and can only be changed via the MAC process.
    - In the *Business Hours* section select the hours that access to CWS/CMS is required at this site on a routine basis. At a 24 X 7 site these are also the hours that the Site Contact is available to work on such issues as opposed to the After Hours Contact.
    - In the *24 X 7 Contact Information* section select the *24 X 7 Site* box only if a County Contact is available at all hours (24 hours a day, 7

days a week) to respond in person to the site. (See the Alert dialog for a full description of availability requirements.)

- If the *24 X 7 Site* box is checked, data entry in two additional text fields in that section is required. Enter the *After Hours Contact* name and *After Hours Phone* information.

**Note: When changes to the 24 X 7 section are submitted a notification email is automatically generated to responsible Project Staff. Verification may precede notification of vendors.**

- When all information for that Site ID location is entered click on the “*Submit*” button. The changes are live and will be reflected immediately.
- County Notes (CWS Administrators Only. Probation administrators will edit information on Edit Probation Contacts page)
  - In the text field on the *County Notes Administration* page enter notes and explanations regarding any other entries on the *Contact Pages*. An Alert description is available by hovering and clicking on the section title.
  - After entering text that you want to appear in this field click on the “*Save Notes*” button. The changes are live and will be reflected immediately.
- Help Desk Info (CWS Administrators Only. Probation administrators will edit information on Edit Probation Contacts page)
  - On the County Help Desk Administration page a description Alert is available by hovering and clicking your cursor on the *Help Desk* section title, as described above in the Edit Contact List section.
  - In the *Help Desk* section enter information for whom to contact regarding Countywide outages and other help desk issues. Also enter the days and hours that this Help Desk contact is available.
  - The *Off Shift* section is an optional area to note whom to contact, if anyone, if there is a need or reason to communicate with the County Help Desk outside of regular availability hours. In the *Type* field note if this contact number is phone, pager or voice mail. Also note when the Off Shift contact is available in the *Days* and *Hours* fields. Note that this is different than the 24 X 7 requirement, and may be used for different purposes.
  - After entering text that you want to appear in these fields click on the “*Save Changes*” button. The changes are live and will be reflected immediately.
  - CPS Numbers (CWS Administrators Only)
  - Entries on the *CPS Emergency Response Hotline Numbers* administration page populate the following:
    - When web users click the “*Suspect Child Abuse?*” box on the *CWS/CMS Home Page* a callout box that appears. When users





- ones in their Counties authorized to request, of the CWS/CMS State Administrator, additions or changes to CWS/CMS Application *County Administrator* Authorities and Privileges.
- Entries on *the County Administrator* page populate a Statewide *CDSS-Recognized County Admins* list that users can access from link under County Contacts sub-heading on the left side of the *County Contact Information* page (County Info tab).
  - A description of the purpose and usage of this list is available by clicking on the “*Administrator Info*” button at the top of the Statewide *CDSS-Recognized County Administrators* list page. This opens the *CDSS County Administrator Information* page, which includes instructions to Counties for modifying their designated staff person listing.
- County Holiday Matrix (CWS Administrators Only)
    - Periodically review and update the list of Holidays observed by your County. The lists are accessible by clicking on the *County Holiday Matrix* link under the County Contacts sub-heading on the left side of the County Info (tab) pages. Click a County to see observed holidays, or click the Excel “Statewide Holiday Matrix” icon for a statewide list.
    - To make changes click on the *Holiday Matrix* link in the *Web Admin* box. This opens up the *County XX Holiday Administration* page.
      - Two boxes are visible on this page, *Available Holidays*, and *Scheduled Holidays*. Note that Holidays also observed by the State are in Blue font and those observed by some Counties but not the State are in Red font.
      - The *Available Holidays* box includes Holidays not selected by your County, but that you can select as observed by your County.
      - The *Scheduled Holidays* box includes what will be displayed on the Internet, as scheduled for observance by your County.
      - To move a Holiday back or forth between Available and Scheduled, simply click once on it. That Holiday will be moved to the other box. Hovering the Cursor over a Holiday will show a box indicating either “Click to add Holiday”, or “Click to remove Holiday”.
    - These changes are live and will be reflected immediately.
    - Contact Your SSC for assistance or with questions.

### **Log Out**

The County Logon area was changed to include the optional “Keep me signed in” cookie to eliminate the need to log back into this secure area for 14 days. If you wish to cancel this cookie, for security reasons, click on the Log Out link. You will be redirected to the CWS/CMS home page, and be required to enter your password and ID to re-enter the County Logon area from this workstation.