LIMS PRELOG REGISTRARS ONBOARDING AND OFFBOARDING USER GUIDE

Active accounts for existing users of both Ingress and KCLogin will automatically be granted access to the AFIS LIMS PRELOG Case Info application. For all new users, Agency Registrars (Group Owners) must complete the onboarding process to provide access to the application in KCLogin

Onboarding New User to PRELOG

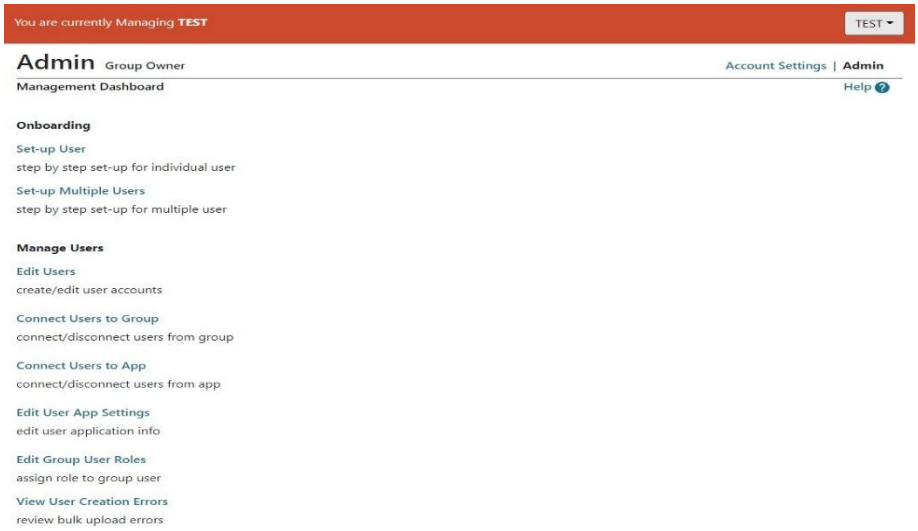
Accessing Admin Portal for Group Owners (Agency Registrars)

Group Owners (Agency Registrars) will find the tools they need to manage groups from the KCLogin Applications Portal.

To access:

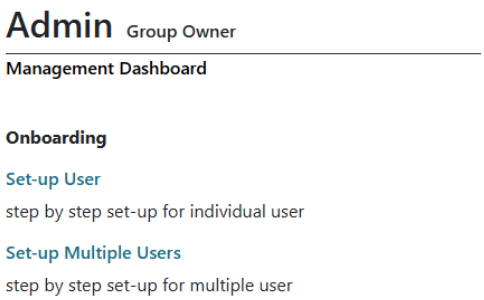
- Go to: https://login.kingcounty.gov
- Sign in with an existing account. (group owners are set-up by KC admin)
- Once logged in, you should see the Account Settings screen which is standard for all users.
- In the upper right, select "**Admin**."

- Once selected, you will be directed to an Admin Dashboard.



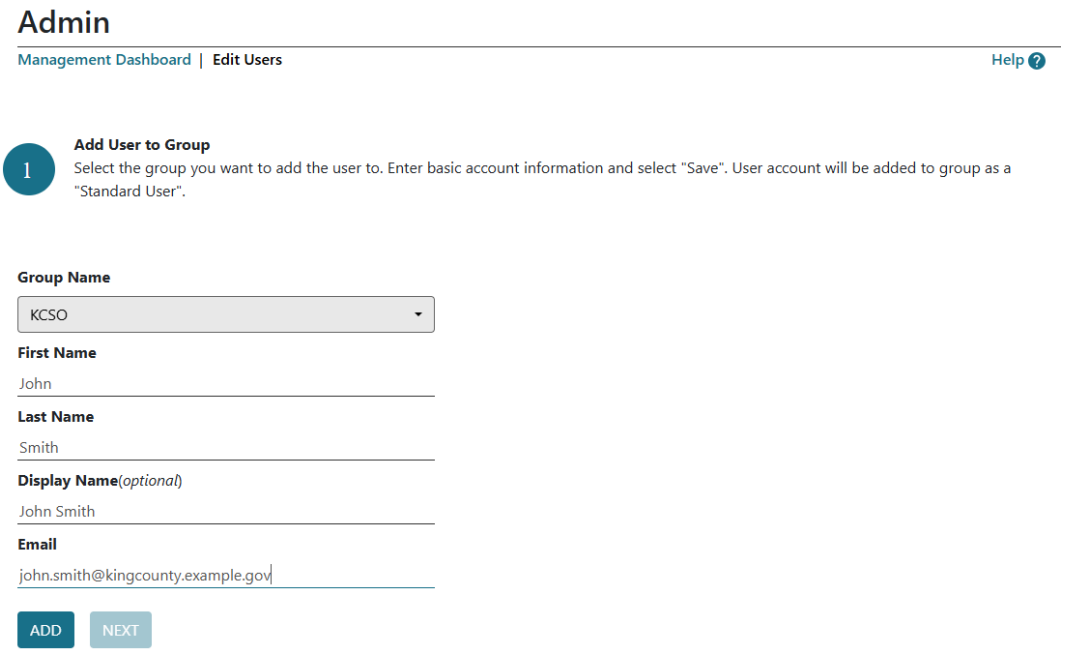
Onboarding New User

If a user does not yet have an account, then proceed to dashboard, and Select "**Set-Up User**" under "Onboarding" to create a new user.



1: The "Add User to Group" screen displays.

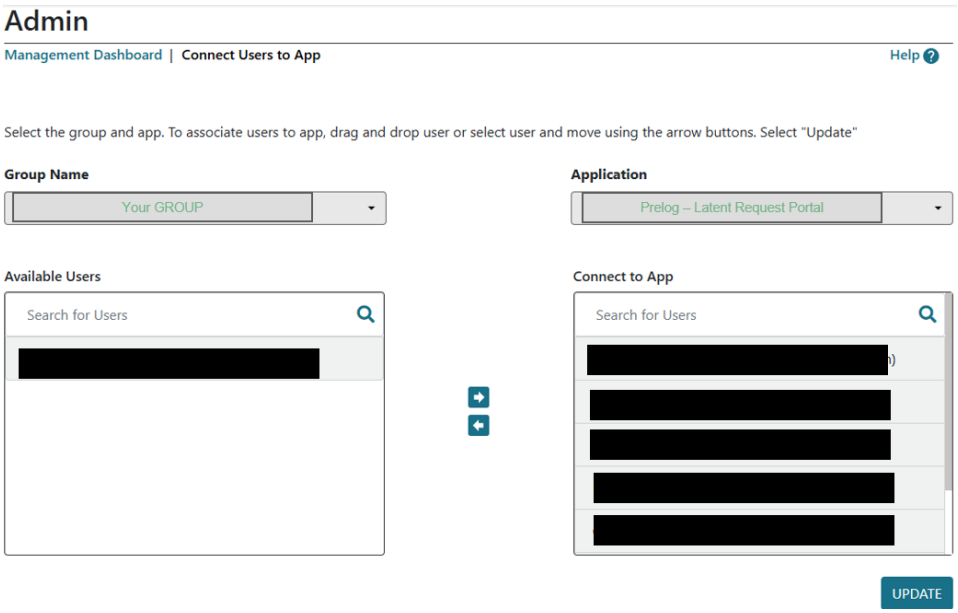
- Select group from dropdown menu. This should be your agency's name.
- Enter First Name.
- Enter Last Name.
- Enter Display Name *(optional).*
- Enter Email Address.
- Select "Add".



- An alert will display: "The user account was created and added to the group."
- Click "Next"

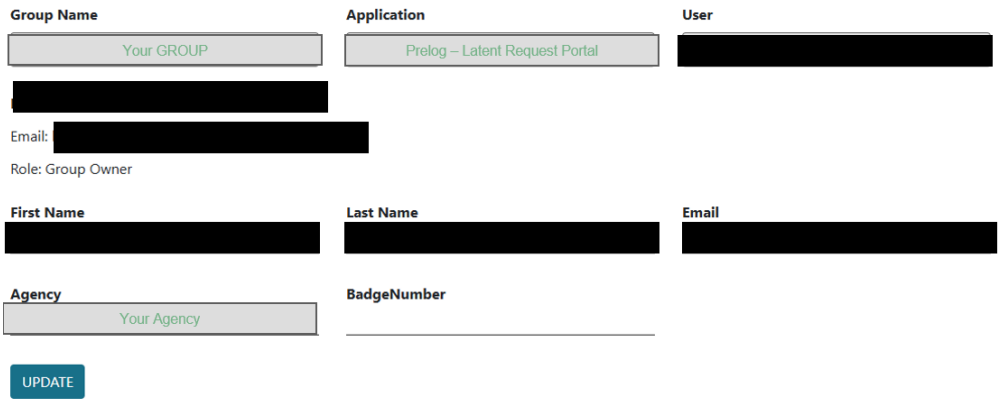
2: The “Connect Users to App” displays.

- From the dropdown menu, select the **PRELOG - Latent Request Portal** Application.
- To associate users to the App, drag and drop a user or select a user and move using the right arrow button from the “Available Users” list to the “Connect to App” list.
- Select “Update.”
- An alert displays that “This process may take a little time. Check back in a few minutes and refresh your browser to verify users have been connected.”
- Click your browser’s refresh button, reselect the app, and confirm the user appears in the “Connect to App” list.
- Click “Update”
- Click “Next” and “Finish”



3: The “Edit User App Settings” displays

- Select your Group Name, “Prelog – Latent Case Portal”, and User (if not automatically selected)
- Ensure that First Name, Last Name, Email and Agency fields are filled out.



- Click the “Update” button.
  - Note: You will receive an error message if required fields are not completed.
- An alert displays saying “User settings (attributes) have been updated.
- Click “Finish.” A window displays saying the user has been added. Click “I’m Done” if you are adding just this user, or “Add Another User” if you are adding more users. You will be redirected to Step 1, so you can move through the process again.

The user you just set-up should receive a confirmation email that they have been added to the group, with a temporary password. They will then need to sign-in and change their password.

Users may also receive a confirmation email that they have been added to an app (if applicable).

Date/Time: 12/18/2020 14:28:31
User Name: Florence Nightengale
User Email: rebecca.watson@kingcounty.gov

An account has been created and you have been added to the following group(s):

- SSA_Default

Your temporary password is "5rkL4O4b2A"
Please change your password immediately after signing-in, to secure your account.

KingCounty.gov
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Onboarding a current user

If the user currently has an account, you will need to connect the user to the Prelog application and edit the app settings. If you have a large number of users, you can use the bulk upload feature to edit the app settings but you will still need to connect the users to the app.

Steps with BULK UPLOAD:

- Bulk upload for app settings

- Add user to app

Steps without bulk upload:

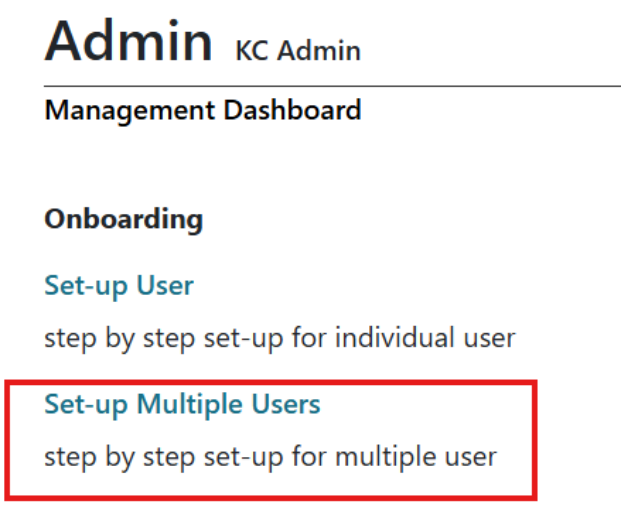
- Add user to app
- Configure User app settings

Bulk Upload App's Settings

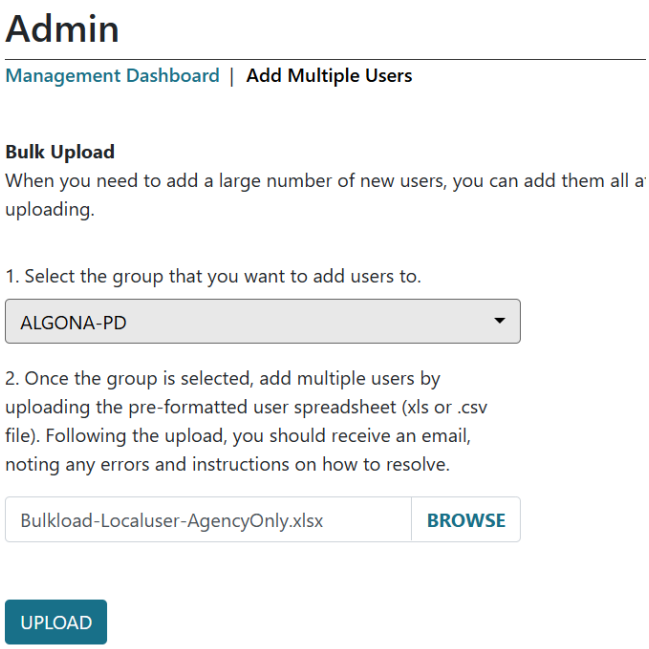
Use the BULKLOAD spreadsheet template to upload your users. You will want to add your (current ***and/or*** new) users to the spreadsheet filling out columns **B, D,F, J &N.**

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Surname	Doe	GivenName	John	displayName	John Doe	signInType	emailAddress	signupEmail	johndoe@kingcounty.gov	Issuer		Agency	KCSO
Surname	Doe	GivenName	Jane	displayName	Jane Doe	signInType	emailAddress	signupEmail	janedoe@kingcounty.gov	Issuer		Agency	KCSO

Go to **Setup Multiple Users** at the management dashboard.

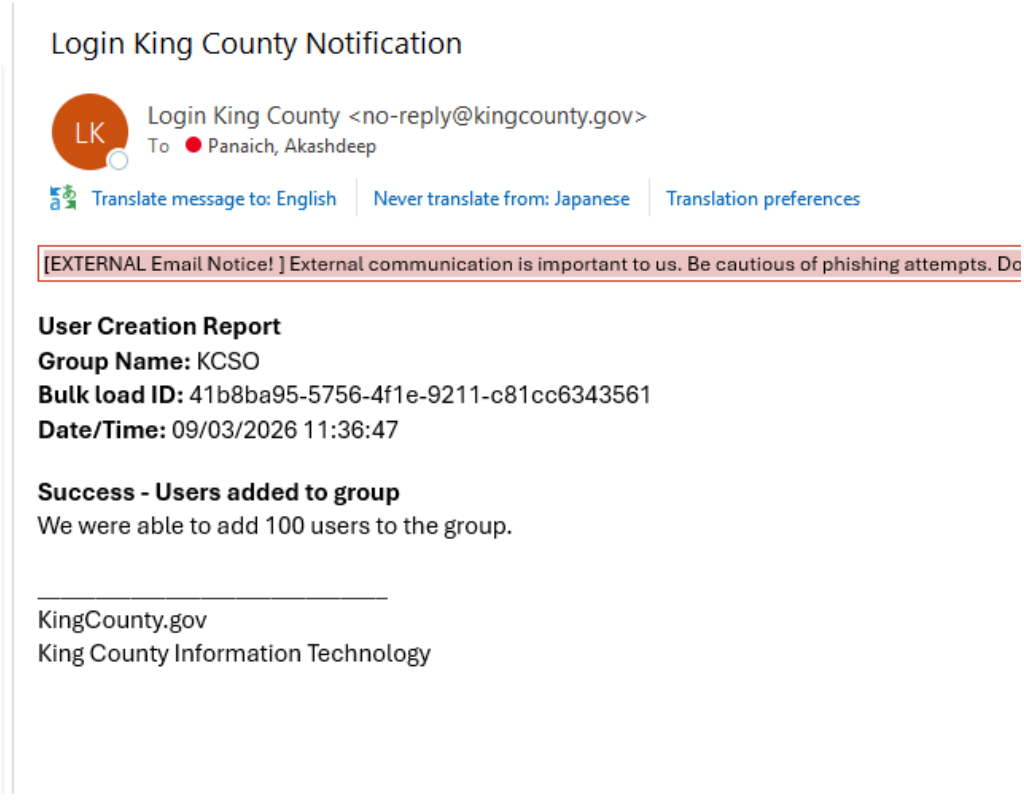


Select your group and upload the Bulkload spreadsheet with your data



Note: If you have more than 100 users, you will need to create multiple spreadsheets and upload them one by one.

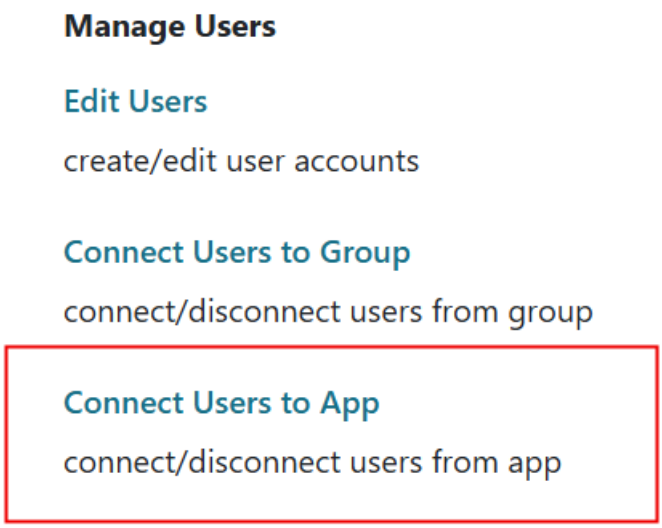
You will get a confirmation email once the process is completed.



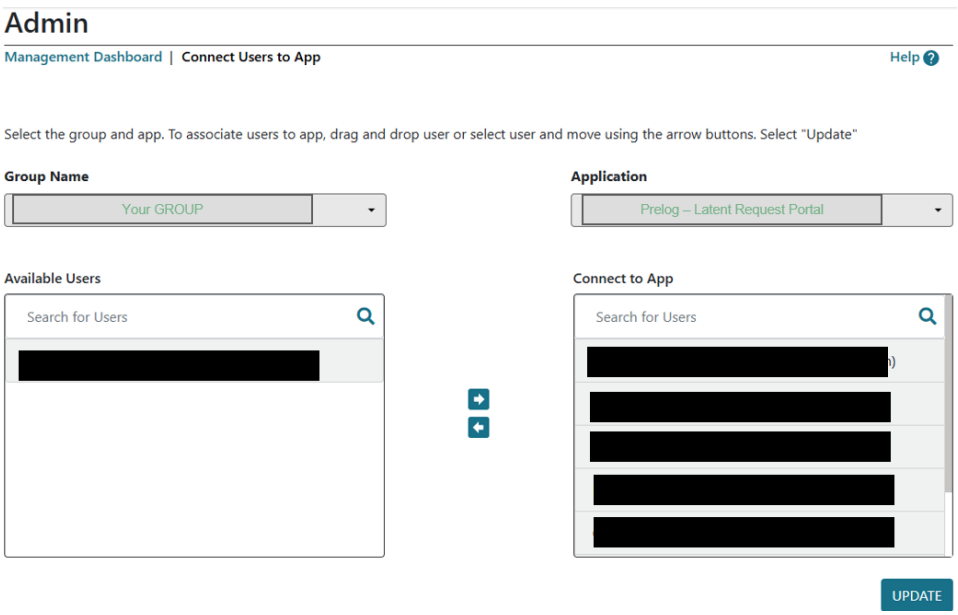
After the bulk upload you will need to connect your users to the app.

Connect Users to App

- From the Management dashboard, select **Connect Users to App** under Manage Users



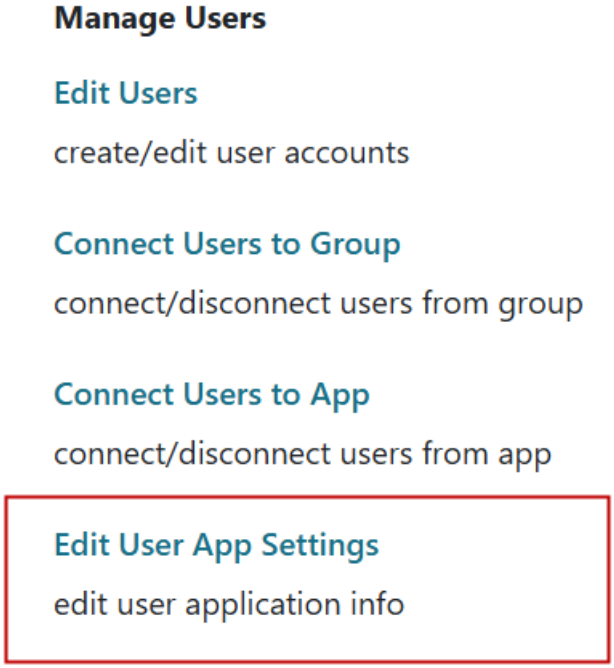
- From the dropdown menu, select the **PRELOG - Latent Request Portal** Application.
- To associate users to the App, drag and drop a user or select a user and move using the right arrow button from the “Available Users” list to the “Connect to App” list.
    - *Note: you can select multiple users by holding control key and selecting more than one user.*
- Select “Update.”
- An alert displays that “This process may take a little time. Check back in a few minutes and refresh your browser to verify users have been connected.”
- Click your browser’s refresh button, reselect the app, and confirm the user appears in the “Connect to App” list.
- Click “Update”



If you did not use the bulkupload option for the app setting, you will need to edit the app settings for each user you've connected to the app.

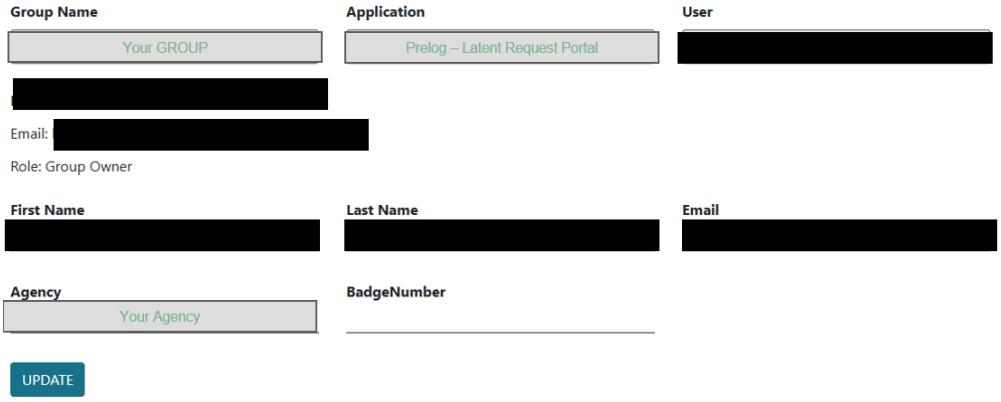
Edit User App Settings

- On the management dashboard select **Edit User App Settings** under Manage Users



- Select your Group Name, "Prelog – Latent Case Portal", and User (if not automatically selected)

- Ensure that **First Name, Last Name, Email** and **Agency** fields are filled out.



- Click the “Update” button.
  - Note: You will receive an error message if required fields are not completed.

User Troubleshooting

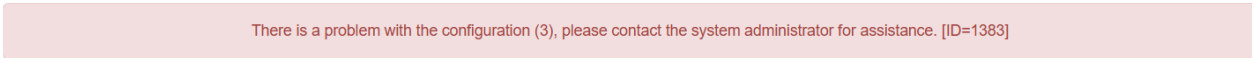
No App on the Portal

If your users are not seeing the app in the portal, this indicated that you have not connected the app for your user.

Error 3

If your users are seeing an error on the Prelog splash page:

There is a problem with the configuration (3), please contact the system administrator for assistance. [ID=1383]



This indicates that the user is missing the correct AGENCY configuration for their User App Settings.

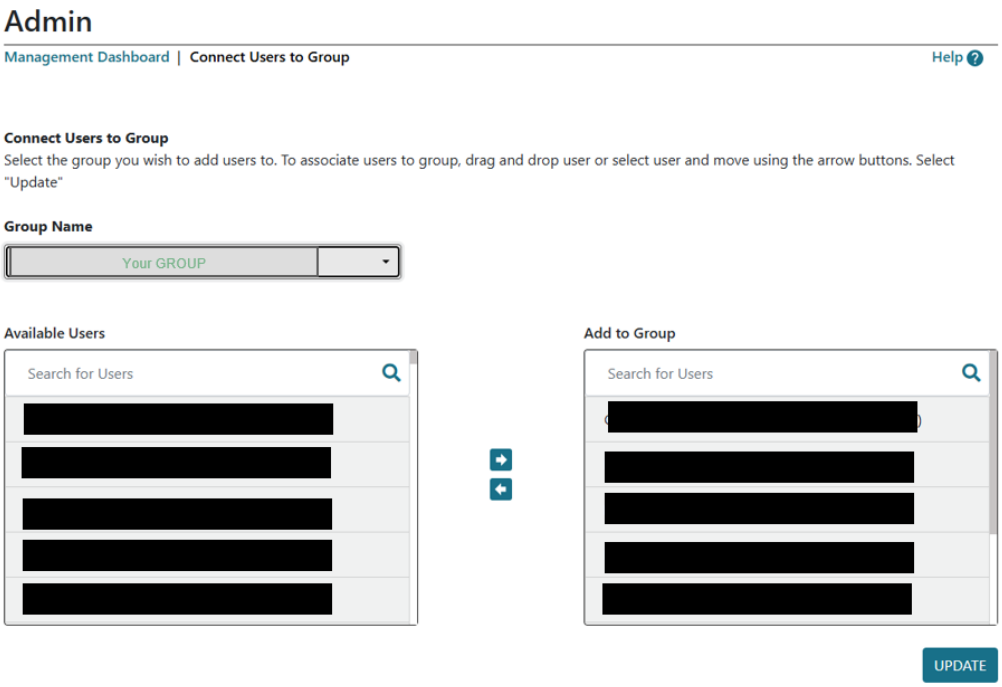
Ensure that the correct value is placed in their app settings.

Offboarding User accounts

Agency registrars must offboard users who leave their agency. This process involves disconnecting the user at the group level, which will revoke their access to the PRELOG - Latent Request Portal Application.

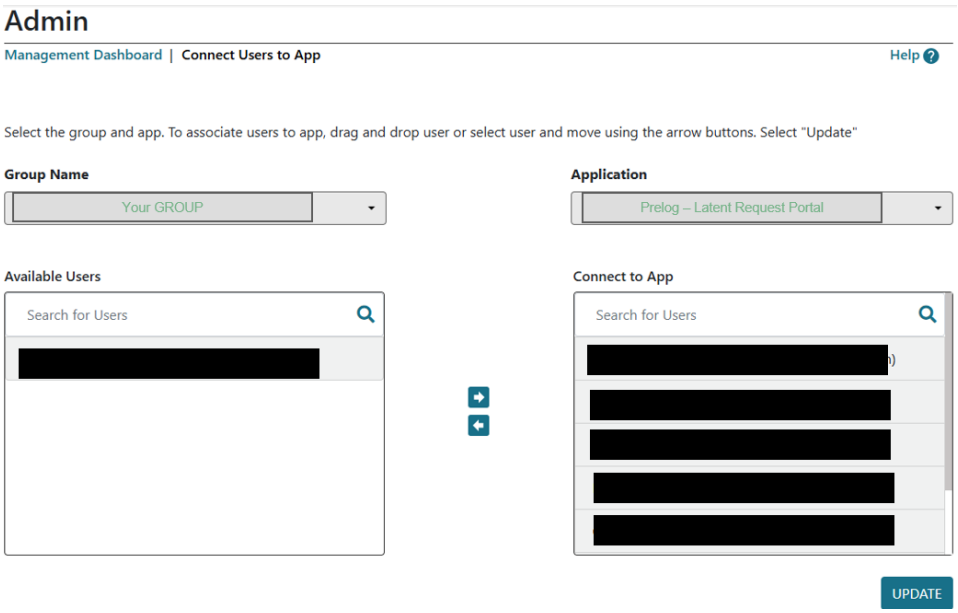
Disconnect Users to Group

- From the dashboard, select “Connect Users to Group”
- To disassociate users from the Group, drag and drop a user or select a user and move using the left arrow button from the “Add to Group” list to the “Available Users” list.
- Select “Update”.
- An alert displays that “This process may take a little time. Check back in a few minutes and refresh your browser to verify users have been connected.”
- Click your browser’s refresh button, reselect the group, and confirm the user appears in the appropriate list.



How to Disconnect a User from the PRELOG - Latent Request Portal App

- From the Dashboard, select “Connect User to App”.
- From the dropdown menus, select the group and PRELOG - Latent Request Portal Application.



- To disassociate users from the app, drag and drop a user or select a user and move using the left arrow button from the “Connect to App” list to the “Available Users” list.
- Select “Update”.
- An alert displays that “This process may take a little time. Check back in a few minutes and refresh your browser to verify users have been connected.”
- Click your browser’s refresh button, reselect the group and app, and confirm the user appears in the appropriate list.