

# HHS Enterprise Portal Features For Supervisors

**Identity and Access Management** 

February 2022

# Contents

Contents 1
For Supervisors
HHS Enterprise Portal Dashboard3
Review Notifications
My Staff Screen
Search for a Specific User
User Summary Screen5
View List of Applications and their Status6View Access Details6View List of Agreements6Review Agreement Content6Suspend User's Access7Restore User's Access7Modify User Access for a Specific Application7Add Access for the User/Modify User Access for Multiple Applications7
Review an Existing Staff Member's Access Request8
Approve Access Request8Deny Access Request9Request New or Modified Access for a Staff Member9Review Order Screen10Remove Access11
Review Orders and Requests12
How is an Order different than a Request?12My Orders Screen13Order Details Screen13Request Details Screen14
Certifying Access <b>Error! Bookmark not defined.</b>
Recertification Timeline Error! Bookmark not defined.

Certify Access Certify and Modify	
Assigning Delegates	
Delegation Screen View Previous Delegation Assignments Cancel a Delegation Assignment Edit a Delegation Assignment Create a New Delegation Assignment	

# **For Supervisors**

The HHS Enterprise Portal is the secure, easy to use site that allows you to access or request new/modified access to multiple state application from just one location! The HHS Enterprise Portal is available 24 hours a day, 7 days a week from any computer, tablet, or smartphone.

The portal provides tools designed specifically to help supervisors or individuals with a supervisor role to manage their staff's access to the Enterprise Portal and the applications they access through the Enterprise Portal.

- Reviewing staff Enterprise Portal profile information
- Reviewing staff access
- Removing/suspending/restoring application access
- Suspending Enterprise Portal access for contractors
- Reviewing and performing actions on staff's access requests
- Requesting new or modified application on behalf of staff
- Delegating Enterprise Portal tasks to an employee

For information on recertifying access, see the Recertification Help Guide.

# **HHS Enterprise Portal Dashboard**

When you first sign-in to the HHS Enterprise Portal you are directed to the Dashboard.

#### Figure 1. HHS Enterprise Portal Dashboard

TEXAS Health and Human Services		(LAST) 3 Home   Delegate   My Profile   My Orders
Access Management	Broadcasts 1	
Notifications 2		
Manage Access	Important! The following applications are due for review and recertification in January.	View Details
View Agreements	For a complete recertification schedule! Click Here.	View Details
Staff Management		
Manage Staff 5		
Manage Onboarding		
Applications		
Report abuse Test		
Report abuse UAT		
PEBLES Inquiry		
Send Word Now - Registration for emergency alerts $\vec{\mathbb{B}}$		

# **Review Notifications**

(1) Broadcasts provide information about the portal.

(2) Click **Notifications**, under **Access Management**, to view notifications specific to you. These notifications alert you to the following:

- an update has been performed on a request that you are following
- a certification review is due for your staff
- a staff's access request is waiting for your review.

Click the hyperlinks inside the notification to view more details or perform an action.

# View Delegate Calendar/Manage Delegates

(3) Click the **Delegate** link in the top right-hand corner. You can also access the delegate screens by clicking **Manage Staff** under the **Staff Management** option of the **Main Menu**. See the <u>Assigning Delegates</u> section to learn more about delegation.

# **View Orders**

(4) Click the **My Orders** link from the top menu. To learn more about reviewing orders, see <u>Review Orders and Requests</u>.

# **View and Manage Staff Access**

(5) Click Manage Staff under Staff Management on the Dashboard to open the My Staff screen.

# **My Staff Screen**

#### Figure 2. My Staff Screen

TEXAS Health and Human Service	es	(LAST) Home   Delegate   My Profile   My Orders
Access Management	My Staff	
Notifications		
Manage Access	View Delegation Schedule 5	1
View Agreements		Search:
Staff Management	Path Darker	
Manage Staff	Bob Barker 2 Employee	Delegate   Manage Access
Manage Onboarding	Tony Sanchez	6
Applications	Employee	Delegate   Manage Access
Report abuse Test	Jeff Hadlock Contractor	3 Suspend   Delegate   Manage Access
Report abuse UAT	Contractor	• · · · · · ·
PEBLES Inquiry	Jane Hostly	4 Delegate   Manage Access
Send Word Now - Registration for emerge	ncy Employee	<b>•</b>

# Search for a Specific User

(1) Enter their name in the **Search** field or scroll through the list of names.

# **View Staff's Portal Information**

(2) Click the staff member's name.

# Suspend a Contractor's Enterprise Portal Account and All Integrated Applications Access

(3) Click the **Suspend** link in the contractor's row. Enterprise Portal account suspension for an HHS employee must be done through CAPPS.

# Designate a Staff Member as a Delegate

(4) Click **Delegate** in that staff member's row.

# **View the Delegation Schedule**

(5) Click the **View Delegation Schedule** button at the top of the screen. See <u>Assigning Delegates</u> to learn more about managing delegates.

# **View and Manage Staff Access**

(6) Click the **Manage Access** link in the staff member's row to open the **User Summary** screen.

# **User Summary Screen**

Some users may have multiple accounts for one application. Look at the username listed in each application's row to help you keep track of which account you are reviewing. The user's name appears at the top of the screen for the user you are looking at. If there is no username listed, you are looking at your own **User Summary** screen.

							Ad	d/Modify Acces	55
Item Name 1	<ul> <li>Userna</li> </ul>	ame	🔶 Last	Certification		Status	÷	Action	
CCCRS - ITST	000005	55556	12/21/	2019	/	Active		Suspend   Modify	
EDG 2	000005	55556	12/21/	2019	,	Active		Suspend   Modify	
EFTServer	000005	55556	12/20/	2019	/	Active		Suspend   Modify	
Enterprise Account	000005	55556			1	Active			
GPS	000005	55556	12/21/	2019	/	Active		Suspend	
ITIM Account	000005	55556			,	Active			
Agreements 3				Version #		Last Sig	ned		

Figure 3. User Summary Screen

# **View List of Applications and their Status**

(1) Applications are listed under **Item Name**. Each row includes:

- Your staff member's username for the application
- Date the last certification was completed.
- The user's access status for that application.

# **View Access Details**

(2) Click the Item Name.

#### **View List of Agreements**

(3) **Agreements** for which your username has signed are listed at the bottom of the screen.

#### **Review Agreement Content**

(4) Click the hyperlinked name of the agreement. You can also download or print the agreement after it is open.

			8 Add/	Modify Access
Item Name	▲ Username	Last Certification	🔷 Status 🝦	Action
BusinessObjects MBOW	12345000001	11/05/2020	Active	Modify 7
CAPPS FIN	12345000001	01/23/2020	Inactive	
EDG	12345000001	02/28/2020	Active 5	Suspend   Modify
Enterprise Account	12345000001		Active	
IDDI Analytics Dashboard	12345000001	12/04/2020	Active	Suspend   Modify
ITIM Account	12345000001		Active	
LIS	12345000001	04/02/2020	Inactive	Restore 6
PMAS - Performance Management Dashboard	12345000001	10/30/2020	Active	Suspend   Modify
WORx	TestWorxJH2	02/26/2020	Inactive	Restore
		Version #	Last Signed	

#### Figure 4. User Summary Screen

# **Suspend User's Access**

(5) Click **Suspend** in the application's row.

Immediate suspension occurs only for applications that are fully integrated into the portal. For applications that require manual provisioning, additional time is necessary before the suspension can take effect and the status is updated. The status of the access will change from **Active** to **Inactive** after the suspension request is complete.

#### **Restore User's Access**

(6) Applications with a suspended status have the option to restore them. Click the **Restore** option to restore access. The status of the access will change from **Inactive** to **Active** once the restore is complete.

#### **Modify User Access for a Specific Application**

(7) Click **Modify** in the application's row to open the **Review Orders** screen.

# Add Access for the User/Modify User Access for Multiple Applications

(8) Click **Add/Modify Access** at the top of the screen to open the **Select Items** screen.

# **Review an Existing Staff Member's Access Request**

A notification appears on the HHS Enterprise Portal Dashboard when a staff member submits an access request. Click **Review Request** inside the notification to open request details.

At a minimum the standard **Review Request** screen displays the following:

- Request Number
- Name of Application
- Requester
- Recipient of the Access Request
- Request Date
- Request Type
- History of actions performed against the request.

Other fields are available depending on the user and request type. If you are supervising contractors, you also approve their profile from this page.

#### Figure 5. Review Request Screen

<b>Review Reque</b>	st
Request#	8315969567848270777
System:	EFTServer
Requested By:	Test Employee01
Requested For:	Test Employee01
Request Date:	01/11/2021
Request Type:	New Access - EFTServer access request for Test Employee01 is waiting for your approval.
History	
01/11/2021 15:44:	26: Test Employee01 -
	<b>3 2 1</b>
	Rack Denv Approve
	Back Deny Approve

#### **Approve Access Request**

(1) Some requests allow you to edit the selections before approving. Click **Approve** to open the **Add Details** window. Entering details is not required if you are approving the request. Click **OK** to complete the approval. Click **Back** to exit the request without performing an action. You have ten days to perform an action on a request. If you do not act on a request within ten days, the system cancels the request and the requester will have to resubmit the request.

# **Deny Access Request**

(2) Click **Deny** to open the **Add Details** window. Details are required to deny the request. Enter the details on the **Notes** screen. Click **OK** to complete the denial. Click **Back** to exit the request without performing an action. You have ten days to perform an action on a request. If you do not act on a request within ten days, the system cancels the request and the requester will have to resubmit the request.

(3) Click the **Back** button to go back to the **Notifications** screen without taking an action.

# **Request New or Modified Access for a Staff Member**

(1) Items for which the staff currently has access are listed in the top highlighted rows of the **Select Items** screen, under the heading **Existing Access**. Click these items to modify existing access. Use the horizontal scroll bar to view the staff member's name for a specific application. Click items in these rows to restore or suspend access to these applications.

(2) Items in non-highlighted rows, under the section titled **New Access**, represent applications for which the user does not have access. Click these items to request new access for the user.

Select Items: Jan	e Hostly		
Select up to 15 items	i.		Agency: 4
Existing Access		3	
	Se	earch:	
Access Name	Description	Username 🔶	Other
	Laboratory Information System	JaneHostly	Categories:
			Online Forms
			Downloadable IT Forms
			Show all categories
			Clear category filters
New Access 2			
-	Se	earch:	
Access Name	Description	\$	
AARS - ITST	Adverse Action Record Sharing	System	
AARS - LaST	Adverse Action Record Sharing	System	

#### Figure 6. Select Items Screen

- (3) Enter text in the **Search** field to find a specific application.
- (4) You may also take advantage of the filter options to narrow your results.

(5) Click **Next** when you have completed making your selections.

# **Review Order Screen**

(1) On the **Review Order** screen, click the **Information Required** links to provide the necessary information. The process for providing this information varies depending on the application.

Figure 7. Review Order Screen

Review Order				
			3	Empty Cart
Item Name	Request Type	Submitted For	Status 🔷	
BusinessObjects MBOW	New Access	Jane Hostly		on Required
EFTServer	New Access	Jane Hostly	Informatic	on Required 2 🛍
		4	Return To List	Submit Order

Other Actions:

- (2) Click the **trashcan** icon to remove a single item from your cart.
- (3) Click **Empty Cart** to remove all items from your cart.
- (4) Click **Return to List** to return to the **Select Items** screen to add more items to your cart.

Figure 8. Review Order Screen

Review Order						
					Empty	Cart
Item Name	Request Type	Submitted For	\$	Status	♦ ♦	÷
BusinessObjects MBOW	New Access	Jane Hostly		$\bigcirc$	Edit	圃
EFTServer	New Access	Jane Hostly		$\bigcirc$	Edit	圃
✓ I understand that by submitting this	s order I am agreeing th	nat all information in each reque	st is true a	and necess	ary. 6	
5	agreenig a		urn To		Submit O	

(5) After you have entered the required information for all items in your cart, a confirmation/submission message opens. Read and click the box beside the message to agree to its terms.

(6) Click **Submit Order** to finalize the request. See the <u>Review Orders and</u> <u>Requests</u> section for more information.

You will receive an update via Enterprise Portal **Notifications** and an email within 10 days of submitting the order. You may also review updates at any time by clicking the **My Orders** link at the top right of the screen. See <u>Review Orders and</u> <u>Requests</u> for more information.

## **Remove Access**

- 1. Click on Manage Staff under Staff Management on left menu.
- 2. Search or scroll through the list of employees to find the person for which you wish to remove access.
- 3. Click **Manage Access** in the staff member's row to open the **User Summary** screen.

User Summary: Jane Hostly						
	Add/Modify Acce					
Item Name	Username 🔶	Last Certification	🔷 Status 🔶	Action		
BusinessObjects MBOW	77777711142	01/14/2021	Active	Modify		
Enterprise Account	77777711142		Active			
ITIM Account	77777711142		Active			
LIS	JaneHostly	11/10/2020	Inactive	Restore		
SASO - CMS Merge	77777711142	01/14/2021	Active	Modify		
Agreements		Version #	Last Signed			
Acceptable Use Agreement (AUA)		1.0	10/27/2020 05:01 PM			

#### Figure 9. User Summary Screen

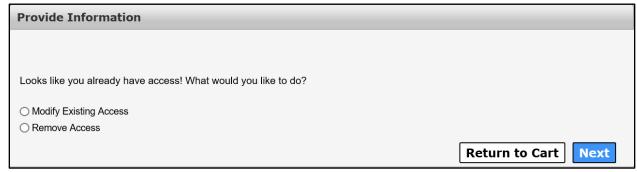
4. Click **Modify** in the appropriate row to open the **Review Orders** screen. Note: A pop-up window will open asking if you want to proceed. Click **Yes**.

Figure 10. Review Order Screen

Review Order							
						Empty	Cart
Item Name	<b>A</b>	Request Type	Submitted For	Status 🍦			
BusinessObjects MBOW	Ν	Iodify Access	Jane Hostly		Informatio	n Required	圃
				Return T	o List	Submit C	Order

5. Click the **Information Required** link to open the **Provide Information** screen.

# Figure 11. Provide Information Screen



- 6. Select **Remove Access**.
- 7. Click **Next** to select a date for the removal.
- 8. Click Next to open the Review Order screen.
- 9. Click the confirmation message.
- 10.Click **Next**. The employee's access will be removed on the date specified.

# **Review Orders and Requests**

# How is an Order different than a Request?

An **Order** defines the collection of items that you have requested access to in one submission and is given an order number. Each item in that order is a **Request** and is given an individual **Request Number**.

When an update has been made to your order, you are informed via email and **Enterprise Portal Notifications**. You can also check the status of your order and requests by Clicking the **My Orders** link at the top right of any Enterprise Portal screen.

Figure 12. HHS Enterprise Portal Dashboard

TEYAS	(E.S)	(LAST)
TEXAS Health and Human Services		Home   Delegate   My Profile   My Orders 🏹
Access Management	Broadcasts	
Notifications		
Manage Access	Important! The following applications are due for review and recertification in January.	View Details
View Agreements	For a complete recertification schedule! Click Here.	View Details
Staff Management		
Manage Staff		
Manage Onboarding		
Applications		
Report abuse Test		
Report abuse UAT		
PEBLES Inquiry		
Send Word Now - Registration for emergency alerts টি		

# **My Orders Screen**

Orders that you created within the last six months are displayed, starting with the most recent. You can rearrange the order from oldest to newest by clicking the arrows beside **Order Number** or **Submitted Date**. If the status is **In Progress**, you also have the option to cancel the order. Click the **Order Number** to view details about a specific order.

#### Figure 13. My Orders Screen

My Orders		
		Refresh
Order Number	Submitted Date	\$
1025740	01/14/2021 02:37 PM	
1025363	12/04/2020 10:07 AM	

# **Order Details Screen**

Order **Details** include the request number, item name, request type, who the request was submitted for, the order status, and actions taken against the request. Click the **Request Number** in a row to view more information.

Figure 14. Order Details Screen

Order Details	_				
Order Number: 1025740	i i				
Request Number 🔺	Item Name 🝦	Request Type  🍦	Submitted For	Status 🕴	Actions
188712561819169137	LIS	Restore Access	Jane Hostly	In Progress	Cancel
					Back

## **Request Details Screen**

**Request Details** include the history, received/completed date, who the request was completed by, and status. Click **Details** in the row of an activity to learn more information about that activity.

#### Figure 15. Request Details Screen

Request Details for: 188712561819169137							
	Request Activity	e Re	ceived Date 🌢	Completed Date		Completed By	Status 🛊
Details	Restore Access	01/14 PM	1/2021 02:37				
	Manual Provisioning for Restore Request	01/14 PM	1/2021 02:38				PENDING
							Back

# **Assigning Delegates**

The HHS Enterprise Portal allows you to delegate certain tasks to your specific staff members.

As a supervisor, you receive access requests from the Enterprise Portal which require attention within a designated period. When you do not perform actions on these requests, the request is cancelled, and the requester must request the access again which can be time consuming.

The Enterprise Portal's delegation feature allows you to delegate a staff member to perform your tasks during periods when you are unavailable (i.e., sick, vacation, etc.).

It is important to keep the following points in mind when assigning a delegate:

• Assigning a delegate means all requests customarily sent to you will instead be forwarded to the delegate during a defined timeframe.

- Requests submitted before the start date/time do not transfer to the delegate.
- Requests forwarded to the delegate during the delegation period will remain assigned to the delegate until the requests are completed, rejected, expired.
- Delegates can only approve or deny requests; they cannot initiate requests on your behalf.
- Delegates can recertify staff access.
- As the delegator, you are responsible for actions taken by the delegate.
- The delegation periods last up to 180 days. To extend the date past the 180day mark, change the end date after the delegation period has started.

#### Figure 16. Manage Delegation Screen

anage Dele	gation		
Read the follo	owing information before assigning	g a user to a delegate role:	
All requests	s customarily sent to you will instead t	be forwarded to the delegate during a	a defined time frame.
<ul> <li>Requests st</li> </ul>	ubmitted before the start date/time do	o not transfer to the delegate.	
Requests for	prwarded to the delegate during the d	elegation period will remain assigned	to the delegate until the requests are
completed, rej	ected, or expired.		
<ul> <li>Delegates of</li> </ul>	can only approve or deny requests; th	ey cannot initiate requests on your b	ehalf.
<ul> <li>As the delegation</li> </ul>	gator, you are responsible for approv	als made by the delegate.	
Delegation So	chedule		Show All
Name	Begin Date	End Date	Actions
Name	Begin Date	End Date	Actions
o start a new d	delegation schedule, click	Delegation	
			Back To Home

#### **Delegation Screen**

(1) A list of current delegates and their delegation periods are shown on the Manage Delegation screen.

#### Figure 17. Delegation Assignment Screen

Manage Dele	egation					
Read the foll	lowing information before assigning	g a user to a delegate role:				
<ul> <li>All requests customarily sent to you will instead be forwarded to the delegate during a defined time frame.</li> <li>Requests submitted before the start date/time do not transfer to the delegate.</li> <li>Requests forwarded to the delegate during the delegation period will remain assigned to the delegate until the requests are completed, rejected, or expired.</li> <li>Delegates can only approve or deny requests; they cannot initiate requests on your behalf.</li> <li>As the delegator, you are responsible for approvals made by the delegate.</li> </ul>						
1 Delegation S	schedule		2 Show All			
Name	Begin Date	End Date	Actions 🔶			
Laura Hull	01/14/2021 04:00 PM	01/15/2021 04:00 PM	3 Cancel or Edi 4			
To start a new	delegation schedule, click New	v Delegation 5				
		Back t	o Staff Back to Search			

### **View Previous Delegation Assignments**

(2) Click Show All.

#### **Cancel a Delegation Assignment**

(3) Click **Cancel** under **Actions** in the row of the assignment that you wish to cancel. Be certain you want to cancel the delegation before you click **Cancel** as this action cannot be undone.

#### **Edit a Delegation Assignment**

(4) Click **Edit** under **Actions** in the row of the assignment that you wish to edit. This action opens the **Delegation Details** screen where adjustments are made.

#### **Create a New Delegation Assignment**

1. Click the **New Delegation** button to open the **Delegate Search** screen (5).

Please select the person you	would like to delegate:			
Please enter or select at lea	st one value.			
6 Last Name	hull			
First Name	laura			
Username / EID				
Email Id				
Agency	HHSC			
Location				
Employee Type	Employee		Back	ar Search
Delegate 🕴 Last Nan	ne 🔺 First Name 🍦	Job Title	Agency	Location 🔶
Select 9 Hull 8	Laura	Technical Writer III	HHSC	AUSTIN

Figure 18. Delegate Search Screen

- 2. Complete search criteria in the search criteria fields (6).
- 3. Click **Search**. A list of search results is returned (7).
- 4. Click the delegate's last name to view their information. This ensures you are selecting the correct individual (8).
- 5. Click **Select** in their row (9).

#### Figure 19. Delegation Details Screen

Delegation So	chedule							
Name		Begin Date		End Date		Actions		
Name	e Laura	Hull						_
Date	Range: *							
10 Begi	n Date	01/14/2021						
Begir	n Time	04 V 09 V PM V						
En	d Date	mm/dd/yyyy						
End	d Time	11 V 59 V PM V						
11								
		gning a delegate to manag from the delegate's actio		•	vay absolves me c	of responsibility	/ for any adverse	1
			Back to S	taff Back	to Search	Cancel	Delegate	

- 6. Click the **start/end** dates and times in the fields provided (10).
- 7. Review the agreement and check beside it to agree to its terms. The **Delegate** button is available once the agreement has been checked (11).

8. Click **Delegate** to finalize the assignment (12).