HHS ENTERPRISE PORTAL

Provisioner Tools

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

As a Provisioner, you will benefit from the portal's many provisioning tools. These tools allow you to perform the following functions:

→ Review and assign tasks to yourself or another Provisioner
→ Search for users and view their access, order/request history, and portal profile
→ Search for specific orders and requests
→ Know when a user's request is ready for you to review and provision
→ Submit an access request on behalf of a user
→ Review orders and requests that you have submitted

Questions? Comments? Suggestions? Please contact us at identitymanagement@hhsc.state.tx.us. You may also find additional help on the HHS Enterprise Portal Web Help.
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Home Screen

After sign-in, the portal opens to the **Home** screen. Here are a few actions you can perform on this screen.

![Home Screen](image)

**Figure 1 Home screen**

Review Notifications

Broadcast notifications **(1)** provide important information about the portal. To view notifications specific to you, click **Notifications** under Access Management on the Main Menu. **(2)** These notifications alert you when a request has been updated or is waiting for provisioning. Select the hyperlinks inside the notification to view its details.

Manage Tasks

Select **Manage Tasks** under Provisioning Tools on the Main Menu **(3)**. See Manage Tasks on p. 4 for more information about this feature.

Search for Users

Select **Manage Users** under Provisioning Tools on the Main Menu **(4)**. See
Search for User on p. 5 for more in information on this feature.

Search Orders/Requests

Select **Search Orders/Requests** under Provisioning Tools on the Main Menu (5). See Search for Orders/Requests on p.7 to learn more about this feature.

View Your Orders

Select the **My Orders** link at the top right of the screen (6). To learn more about reviewing orders, see Review Your Orders and Requests on p. 12.

Manage Tasks

On the **Task List** screen, you will see only tasks related to the application that you are assigned to provision.

*Figure 2 Task List*

View Request Details

Select the request number in the row of the task (1).

View Employee Profile Details

Select the employee's name under **Requested For** (2).

View Only Tasks Assigned to You

Select **Assigned to Me** at the top right of the screen (3).

Show All Tasks

Select **Show All** at the top right of the screen (4).

Reassign a Task

Select the **Reassign** link in the row of the request that you would like to reassign (5).
Assign Task to Yourself

Select the Assign to Me link in the row of the task you would like to assign to yourself (6).

Assign Task to another Staff Member

Select the Assign link in the row of the request that you would like to assign to another staff member (7).
Search for Users

The Manage Users screen allows you to search for users to view their recent orders, their user profile, and/or to submit access requests on their behalf. Fill out the information in the fields provided, select Include Inactive Users (1) to if you want to include inactive users in your search results, then select Search (2). Search results appear at the bottom of the screen.

Be sure to include as much information as possible in the search fields. The system will return an error if it finds more than 100 matches.

Clear Search Criteria

Select Clear (3). Reminder: This action will clear the search criteria, not search results if Search has already been selected.

View User Summary

Select the user's last name (4) in the search results. This action opens the User Summary screen.
On the **User Summary** screen, you can:

1. View details of the user's current access to the application(s) for which you provision, including the last time it was updated and reviewed, the username, and its status *(Active or Inactive)* (1).
2. View user profile (2).
3. View recent orders (3).
4. Submit an access request on behalf of the user (4).

![User Summary: Adam Jones](image)

*Figure 4 User Summary screen*
Search for Orders/Requests

Use the **Search Order/Requests** screen to find users' orders and requests. The screen opens to the requests search by default.

Search for a Request

1. To search for requests, enter data in the fields provided. Select the **Search User** link (1) to search for a user.
2. Select **Search** when you are ready. (Select **Reset** (3) to remove your search criteria and start a new search.)

   Search results will appear the bottom of the screen.

3. Select the request number under **Request Number** (4) to view details of the request.

![Figure 5 Search Order/Requests - Search Requests screen](image)

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**Figure 5 Search Order/Requests - Search Requests screen**
Search for an Order

1. Check the **Order** option (5).
2. Add the order number in the field provided (6).
3. Select **Search** (7).
4. Select the order number under **Order Number** (8) to view its details.

![Search Order/Request - Search Order screen](image)
Review a User's Access Request

A notification appears on your Home screen when an access request is ready for you to review and provision. Select Review Request inside the notification to open the request details.

At a minimum, the standard Review Request screen displays:

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

Other fields will be available depending on the user and request type.

![Review Request screen](image)

**Figure 7 Review Request screen**

Complete Access Request

Select Complete to approve the request (1).

The Add Details window will open. Entering details is not required if you are completing the request. Select OK to complete the approval.

Reject Access Request

Select Deny to reject the request (2). This will prompt the Add Details window to open. Details are required if you are rejecting the request. Select OK to finalize the action.

**If you're not ready to commit...**

Select Back to exit the request without performing an action (3).

You have 10 days to perform an action on a request. If you do not act on the request within 10 days, the system will cancel the request and the requester must resubmit the request again.
Request Access for a User

On the **Select Items** screen, you will only see applications for which you are allowed to provision for the user. Existing accounts appear in highlighted rows (1). Select these rows to request modification to existing access. If needed, use the horizontal scrollbar to view the employee's username for a specific application. You should also select items in these rows if you want to restore or suspend access.

Non-highlighted rows represent new access (2). Select this row if you would like to request a new account for this user.

Select **Next** when you have completed making your selections (3).

*Figure 8 Select Items screen*
On the **Review Items** screen, items that require additional information will have links under **Status** in their row. Select each of these links to provide the necessary information (1). The process for providing this information differs from app to app.

![Figure 9 Review Order - Information Required screen](image)

**Other actions:**

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

**After you have entered the required information for all items in your cart**, a confirmation message will appear. Read and click the box beside the message to agree to its terms (5). Select **Submit Order** to finalize the request (6).

![Figure 10 Review Order - Confirmation screen](image)

You will receive an update via portal notification and email within 10 days of submitting the order. You may also review updates at any time by selecting the **My Orders** link at the top right of the screen. See Review Your Orders and Requests on p. 12 to learn more this feature.
Review Your Orders and Requests

When an update has been made to your order, you will be informed via email and portal notifications. You may also check the status of your order and requests by selecting the My Orders link at the top right of any portal screen.

*Figure 11 Home - My Orders screen*

How is an Order Different than a Request?

An order defines the collection of items that you have requested access for in one submission, and is given its own order number. Each item in that order is a request, and thereby is given an individual request number.
1. **On the My Orders screen:**
   a. Orders that you created within the last six months are displayed, starting with the most recent.
   b. You can rearrange the list from oldest to most recent by selecting the arrows beside **Order Number** or **Submitted Date**. If the status is **In Progress**, you also have the option to cancel the order.
   c. Select the **Order Number** to open details about a specific order.

   ![List of Orders screen](image)

   *Figure 12 List of Orders screen*

2. **On the Order Details screen:**
   a. Order details include the request number, item name, request type, who the request was submitted for, the status, and actions taken against the request.
   b. Select the **Request Number** in the row of a request to view more information.

   ![Order Details screen](image)

   *Figure 13 Order Details screen*

3. **On the Request Detail screen:**
   a. Request details include the history, received/completed date, who the request was completed by, and its status.
   b. Select **View Details** in the row of an activity to learn more information on that specific activity.
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