

# **State of Kansas**

**Department of Health and Environment  
Department for Children and Families**

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## **KEES Business Approver Training Document**

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**Kansas Eligibility Enforcement System  
(KEES) Project**

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**October 31, 2013  
Version 1.0**





# KEES Project KEES Business Approver Training Document

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## Document Change Log

| Date       | Version | Author    | Change Description |
|------------|---------|-----------|--------------------|
| 10/30/2013 | 1.0     | Danny Lui | Original Draft     |
|            |         |           |                    |
|            |         |           |                    |



# KEES Project

## KEES Business Approver

### Training Document

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## 1.0 Purpose

This document is intended to be used as a job aid to help KEES Business approvers approve KEES user requests. A KEES business approver is an appointed DCF or KDHE employee who is responsible for reviewing and approving KEES user requests for their region's business area.

After a request has been submitted, the request will go through a workflow approval process and the request will be reviewed by the designated business approver and KEES security administrator. After it has been approved, the system will create a new user account in the KEES system for the user.

## 1.1 KEES Workflow Approval Roles

| Role                        | Description  |
|-----------------------------|--|
| KEES User                   | A DCF or KDHE employee who needs access to the KEES system.  |
| KEES Submitter              | A DCF or KDHE employee who is responsible for submitting new KEES user request for a region.               |
| KEES Business Approver      | A DCF or KDHE employee who is responsible for reviewing and approving new KEES user requests for a region. |
| KEES Security Administrator | A security administrator who approves and manages user access.   |

## 1.2 Approval Process Overview

When a DCF or KDHE employee requires access to the KEES system, they are required to submit a KEES user request by contacting their designated KEES Submitter for their region and business area. The KEES Submitter will use the provided user information to submit a request using the Oracle Identity Manager (OIM) system. When the request is submitted, OIM will send the request to the designated KEES Business Approver for their region and business area.

For example, if the KEES user belongs to DCF Wichita region's EES business area, then the approval request will be routed to the business approver of this region and business area.

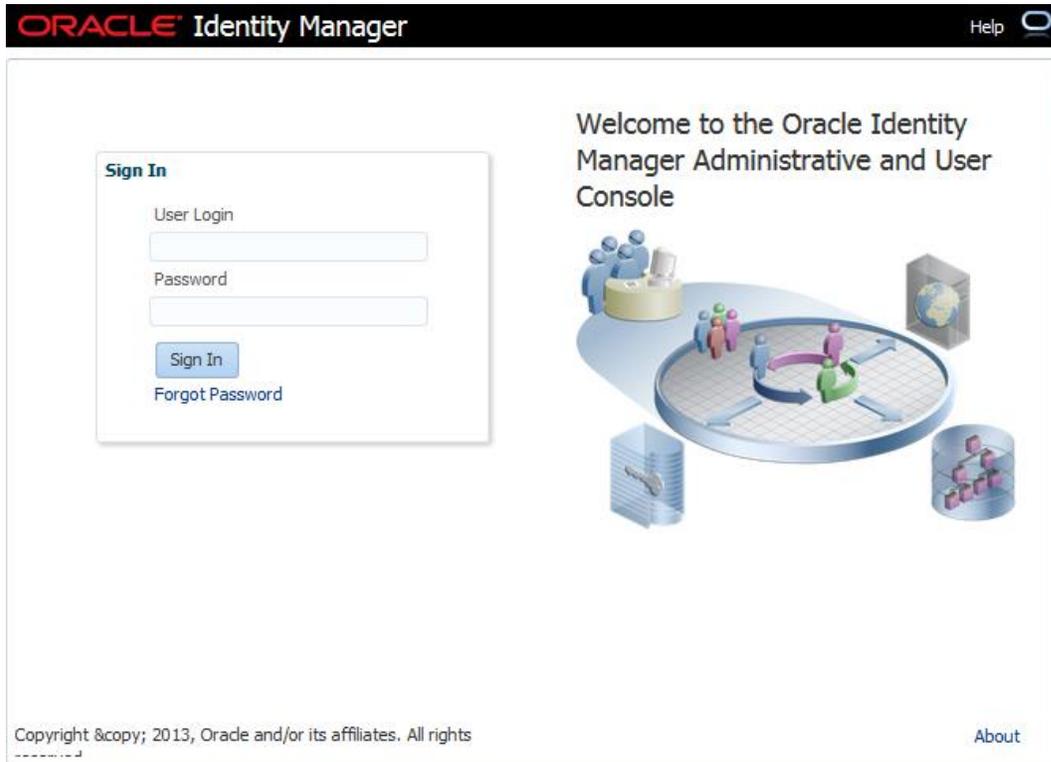
After the request is reviewed and approved by the KEES Business Approver of the user's region/business area, then OIM will route the approval request to the KEES security administrator. The KEES security administrator will validate that the user has completed the required training and submitted the required supporting documents. Once approved, the KEES security administrator will create the user in the KEES system and the system will notify the user of their username and temporary password. This will complete the KEES user request process.

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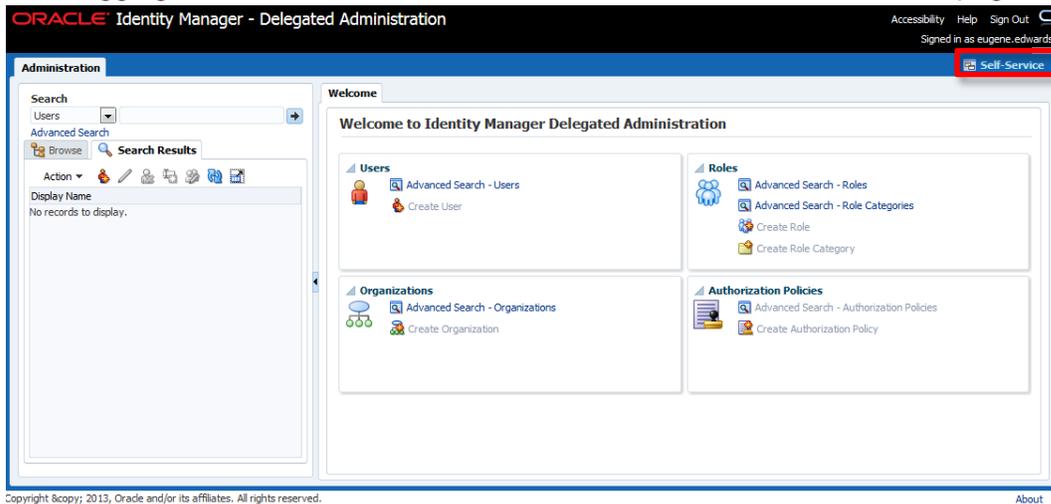
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### 2.0 Approving a KEES user request

1. KEES business approvers are notified by Oracle Identity Manager (OIM) that they have new KEES requests awaiting their approval.
2. A KEES business approver logs in to the OIM administration console using their own user credentials, User Login and Password.

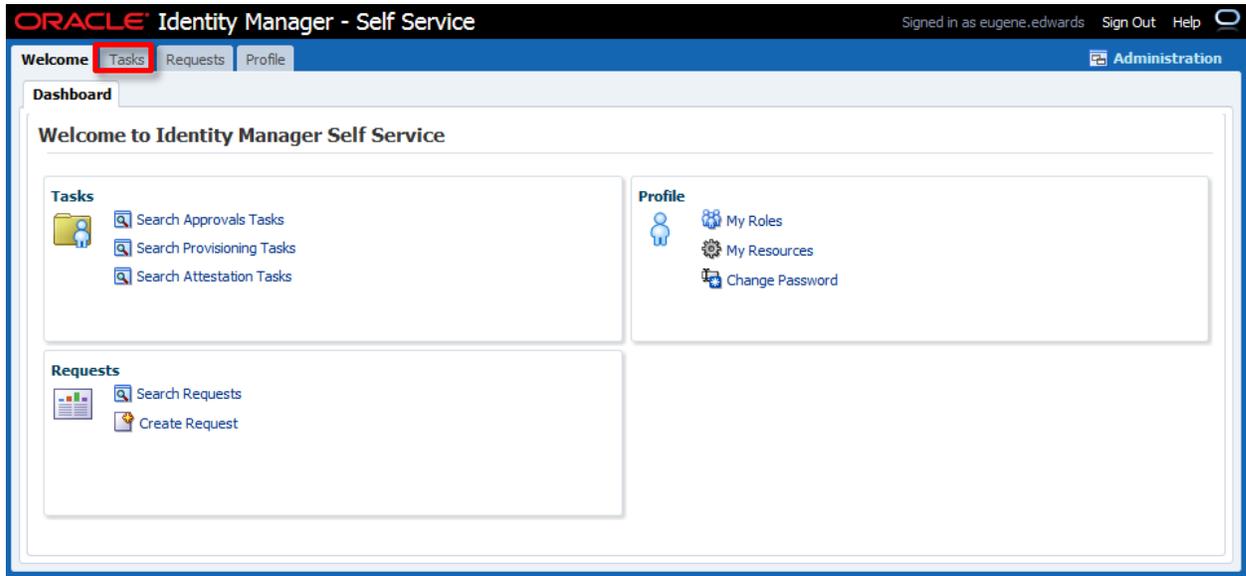


3. Click on “Sign In” button to login to the OIM Administrative and User console.
4. After logging in, click on “Self Service” tab to select the Self Service homepage.



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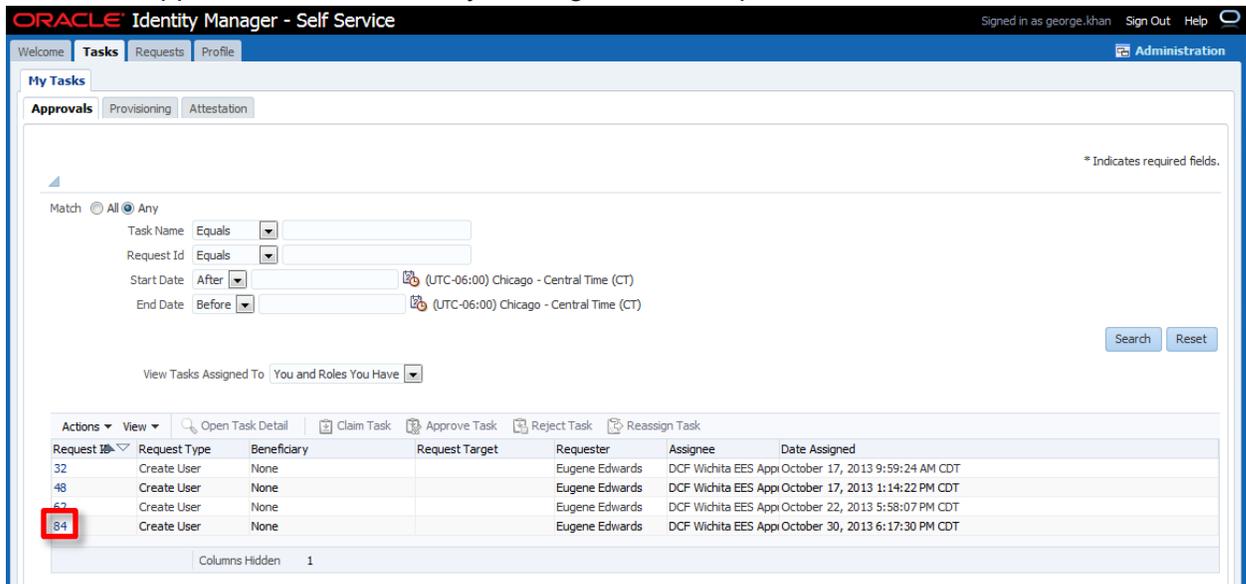
- On the Self Service home page, select the “Tasks” tab.



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[About](#)

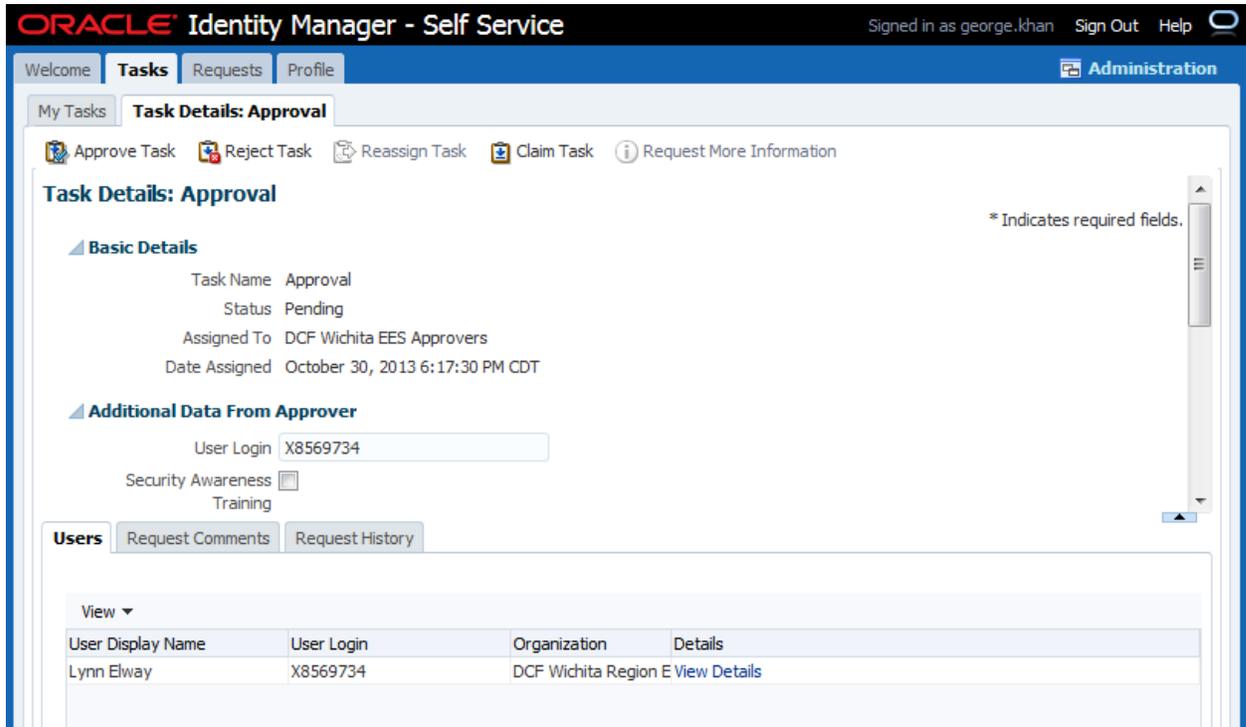
- On the Tasks homepage, OIM will display all the tasks that are assigned to your region’s business area and awaiting approval.
- Select the approval task to review by clicking on the “Request ID” column.



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8. OIM will display the Approval Task details.



Notes: The Task Details page contains the following information:

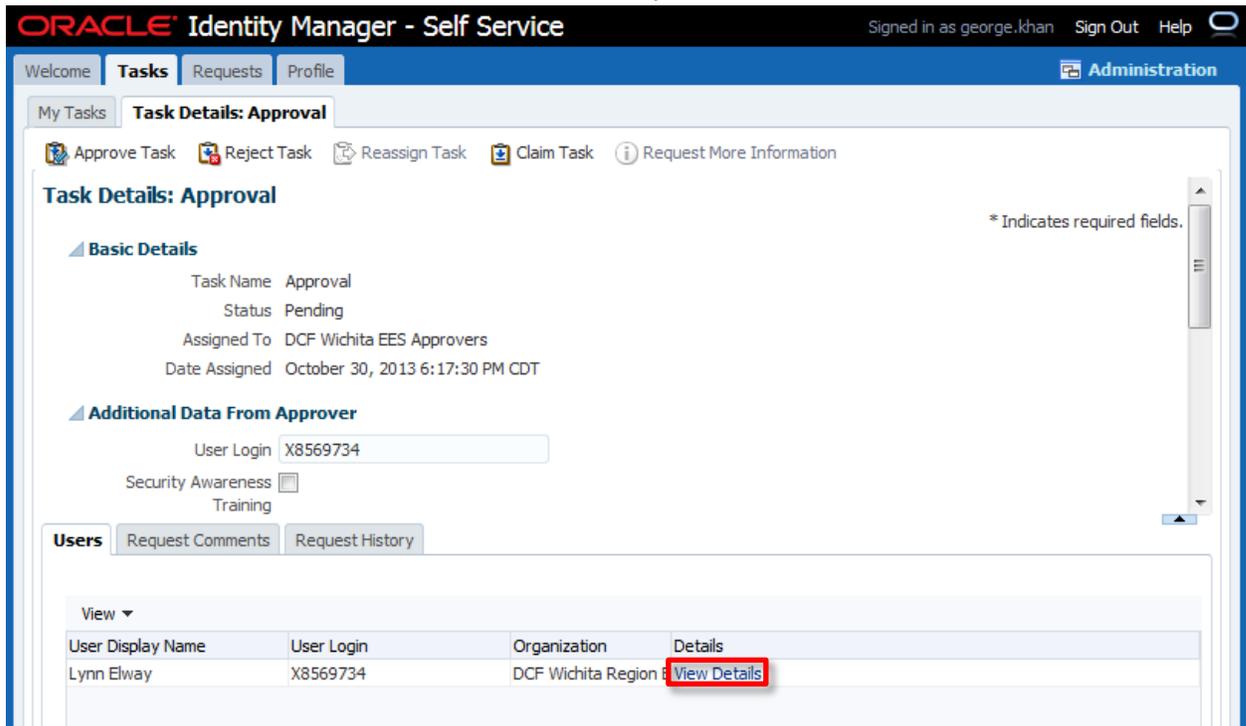
| Task Detail Field             | Description   |
|-------------------------------|---|
| Task Name                     | Type of task and it is usually always Approval.   |
| Status                        | Displays the status of the approval task. Pending means that it is pending your approval decision.  |
| Assigned To                   | The current group who must approve or reject the approval task. The task is assigned the approver group of the user's region and business area. |
| Date Assigned                 | Date the task was assigned to this approval group.  |
| Additional Data From Approver | This section is used only by the KEES security administrators. Please do not change this section.   |

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|              |   |
|--------------|---|
| <p>Users</p> | <p>Displays the list of users in this approval task.</p> <p>User Login: This is a system generated user login and it conforms to the KEES system standards. <b>DO NOT CHANGE.</b></p> <p>Organization: The region and business area that the user is assigned to.</p> |
|--------------|---|

9. You can click on “View Details” to review the user profile.

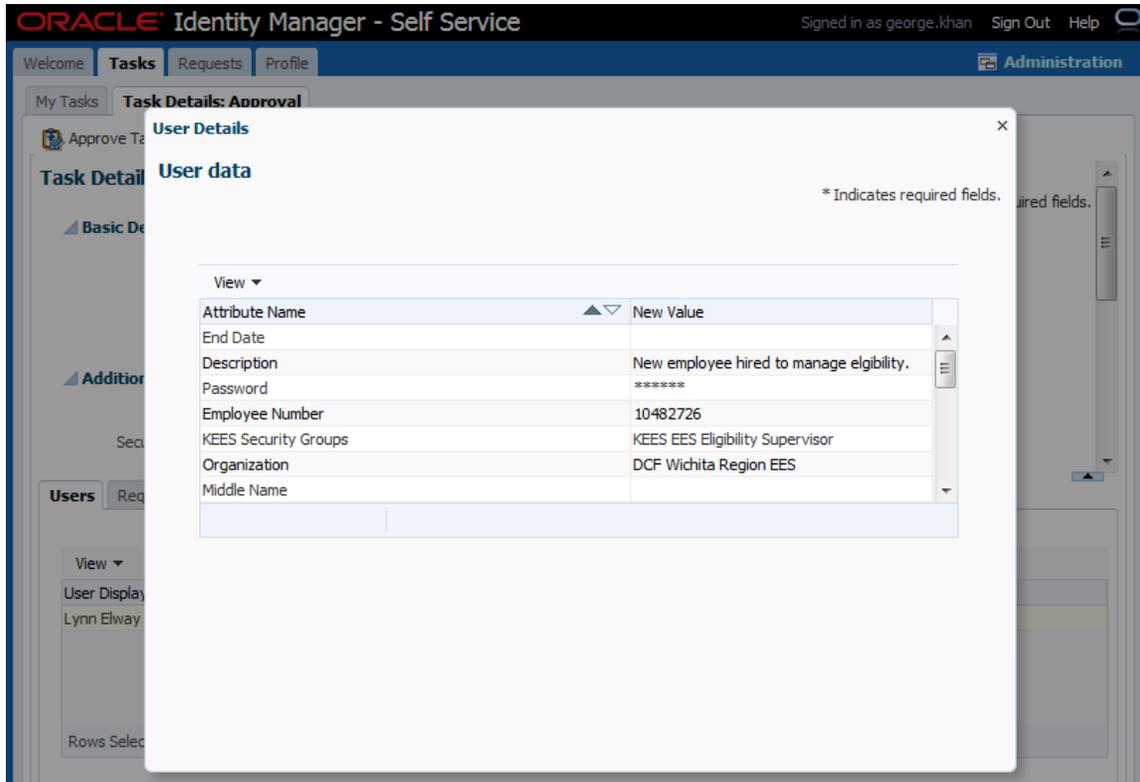


The screenshot shows the Oracle Identity Manager - Self Service interface. The user is signed in as 'george.khan'. The main navigation bar includes 'Welcome', 'Tasks', 'Requests', and 'Profile'. The 'Tasks' tab is active, showing 'Task Details: Approval'. Below this, there are buttons for 'Approve Task', 'Reject Task', 'Reassign Task', 'Claim Task', and 'Request More Information'. The 'Task Details: Approval' section is expanded, showing 'Basic Details' (Task Name: Approval, Status: Pending, Assigned To: DCF Wichita EES Approvers, Date Assigned: October 30, 2013 6:17:30 PM CDT) and 'Additional Data From Approver' (User Login: X8569734, Security Awareness Training: ). Below this, there are tabs for 'Users', 'Request Comments', and 'Request History'. The 'Users' tab is active, showing a table with columns for 'User Display Name', 'User Login', 'Organization', and 'Details'. The table contains one row for 'Lynn Elway' with 'User Login' X8569734 and 'Organization' DCF Wichita Region. The 'View Details' link in the 'Details' column is highlighted with a red box.

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10. OIM will display the user profile information in a popup window.



| User Profile Fields | Description  |
|---------------------|--|
| First Name          | <b>REQUIRED.</b> User's first name   |
| Middle Name         | User's middle name   |
| Last Name           | <b>REQUIRED.</b> User's last name  |
| Organization        | <b>REQUIRED.</b> Select the region and business area that the user is assigned to. (Hint: Click on the magnifying glass next to the field to select from a list of allowed organizations.) |
| User Type           | <b>REQUIRED.</b> Select the user's employment status. (Hint: Use the drop down to see a list of valid user types.)   |
| Display Name        | Display name for the user such as First Name Last Name.  |
| Description         | This is a free form field to allow you to enter additional information that may be useful for the business approver or security administrator.   |
| Employee Number     | Employee number to allow the approver or security administrator to lookup the user.  |

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|                     |  |
|---------------------|--|
| Email               | <b>REQUIRED.</b> User's email address.   |
| Mobile              | User's mobile phone number for contact purposes.   |
| Telephone Number    | User's telephone number for contact purposes.  |
| Title               | User's job title   |
| Start Date          | Planned date that the user needs access to the system. This is not a required field.   |
| End Date            | Planned end date, if available, to terminate the user's access to the system. This is not a required field.  |
| KEES Security Group | <b>REQUIRED.</b> Security group that is requested for this user. This is used to indicate the desired security group. The security group will be approved and assigned by the KEES security administrator. |

11. Click on the "Request History" tab to review the status of the request.

**ORACLE Identity Manager - Self Service** Signed in as george.khan Sign Out Help

Welcome **Tasks** Requests Profile Administration

My Tasks **Task Details: Approval**

Approve Task Reject Task Reassign Task Claim Task Request More Information

**Task Details: Approval** \* Indicates required fields.

**Basic Details**

Task Name Approval  
 Status Pending  
 Assigned To DCF Wichita EES Approvers  
 Date Assigned October 30, 2013 6:17:30 PM CDT

**Additional Data From Approver**

User Login X8569734  
 Security Awareness   
 Training

**Users** Request Comments **Request History**

View

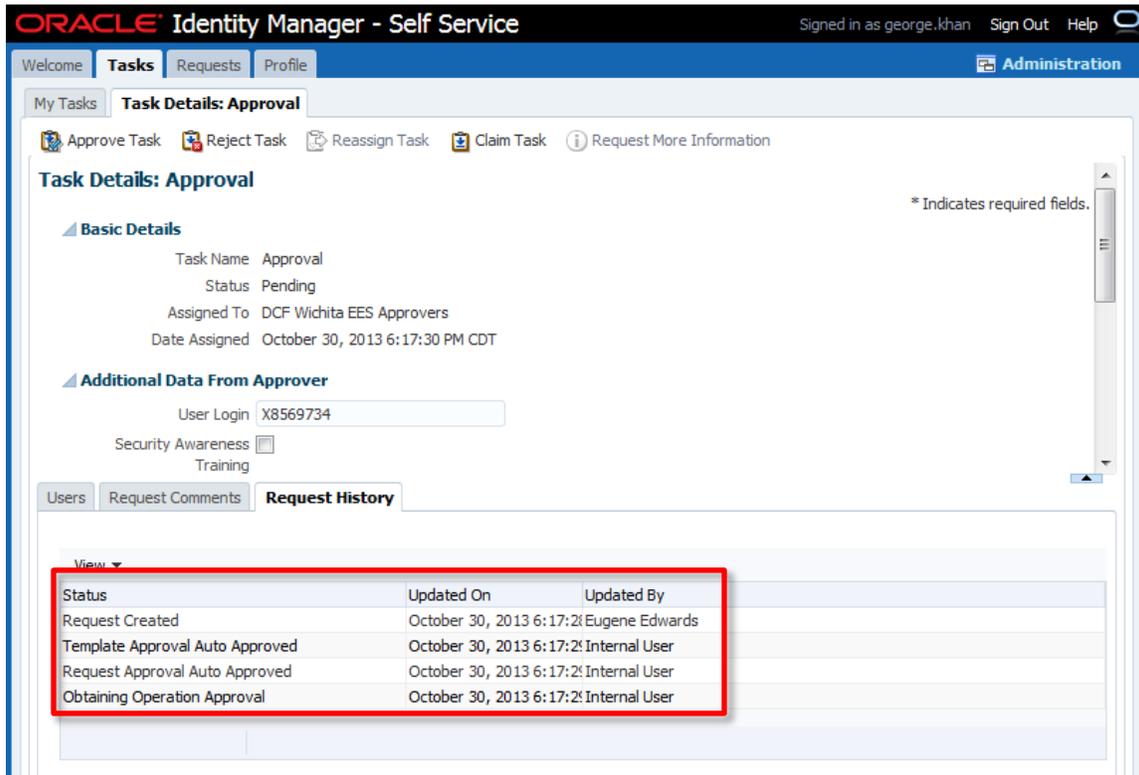
| User Display Name | User Login | Organization         | Details                      |
|-------------------|------------|----------------------|------------------------------|
| Lynn Elway        | X8569734   | DCF Wichita Region E | <a href="#">View Details</a> |

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12. OIM will display the “Request History” of this approval task.
- Additionally, you may click on “Request Comments” to view the comments of other approvers.



The screenshot shows the Oracle Identity Manager - Self Service interface. The user is signed in as george.khan. The main content area displays 'Task Details: Approval' with the following information:

- Basic Details:**
  - Task Name: Approval
  - Status: Pending
  - Assigned To: DCF Wichita EES Approvers
  - Date Assigned: October 30, 2013 6:17:30 PM CDT
- Additional Data From Approver:**
  - User Login: X8569734
  - Security Awareness:
  - Training:

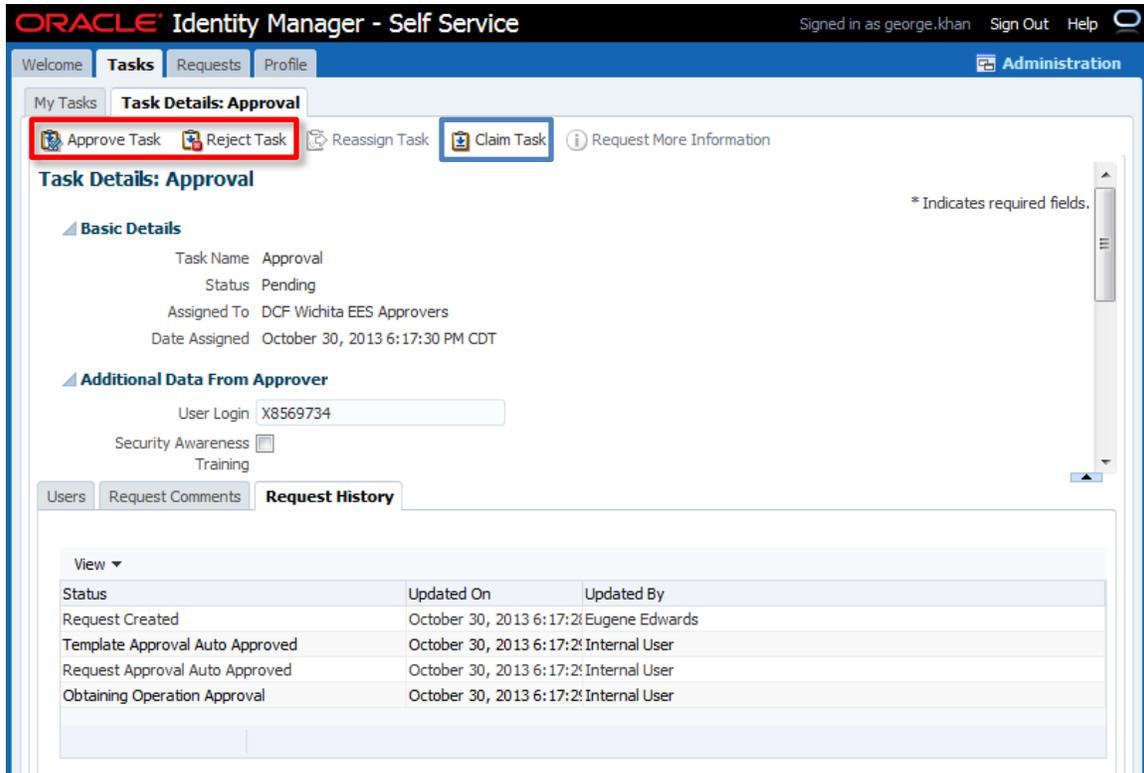
Below the task details, there are tabs for 'Users', 'Request Comments', and 'Request History'. The 'Request History' tab is active, showing a table with the following data:

| Status                          | Updated On               | Updated By     |
|---------------------------------|--------------------------|----------------|
| Request Created                 | October 30, 2013 6:17:21 | Eugene Edwards |
| Template Approval Auto Approved | October 30, 2013 6:17:21 | Internal User  |
| Request Approval Auto Approved  | October 30, 2013 6:17:21 | Internal User  |
| Obtaining Operation Approval    | October 30, 2013 6:17:21 | Internal User  |

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13. You may decide to approve or reject the approval task by clicking on “Approve Task” or “Reject Task” button on the top of this form.
- a. To reject a task, please see “Reject a request” information section below.
  - b. To request additional information, please see “Request More Information” section below.

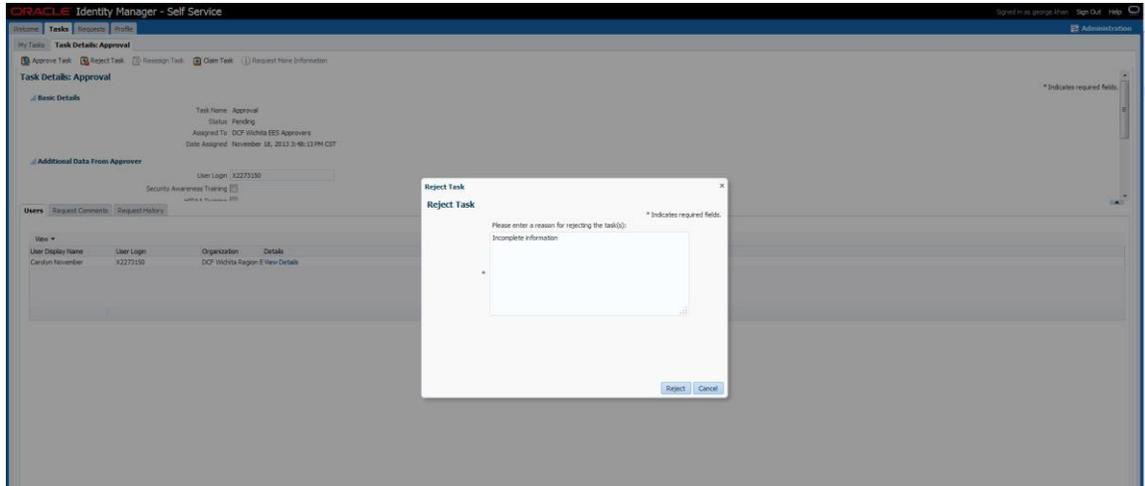


14. After you made your decision, the approval task will be removed from your task list. The next level approver will be notified by OIM.

### 3.0 Reject a request

If it is deemed necessary to reject a task, an approver is able to reject a task from the task list.

1. Select the task that you want to reject.
2. Click on the Reject Task button.
3. Enter a description for rejecting the task.



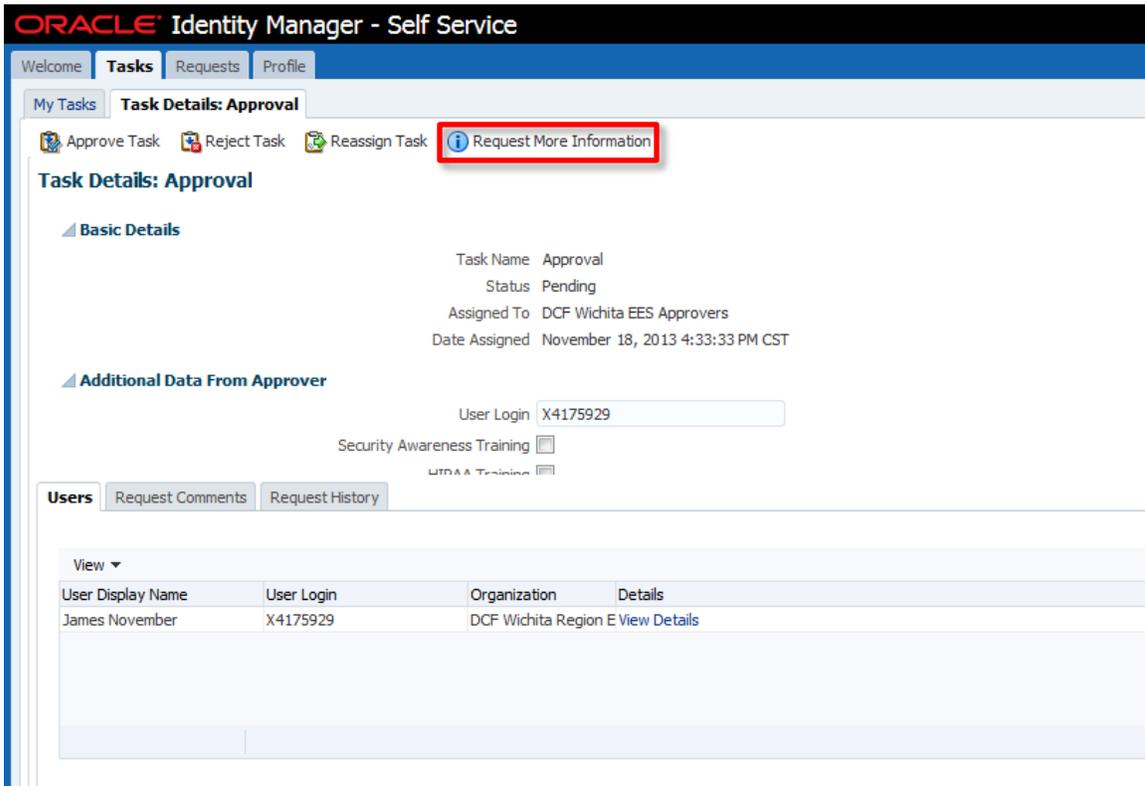
4. The submitter will be notified that their request has been rejected.

### 4.0 Request More Information

If additional information is required, you can request more information rather than rejecting the task. The Request More Information button allows the submitter an opportunity to respond before the request is rejected.

To request more information, you have to first click on the “Claim Task”. The Claim Task function will assign the task to you and you may approve or reject the task in the future date. Other approvers will not see this task on their task list after you claimed the task. After you have claimed a task, you can “Request More Information” from the submitter.

1. To request for more information, select the task to open the task detail view.
2. Click on “Claim Task” to claim the task.
3. Click on the “Request More Information” button.



**ORACLE Identity Manager - Self Service**

Welcome | **Tasks** | Requests | Profile

My Tasks | **Task Details: Approval**

**Task Details: Approval**

**Basic Details**

Task Name: Approval  
 Status: Pending  
 Assigned To: DCF Wichita EES Approvers  
 Date Assigned: November 18, 2013 4:33:33 PM CST

**Additional Data From Approver**

User Login:   
 Security Awareness Training:   
 LTRNA Training:

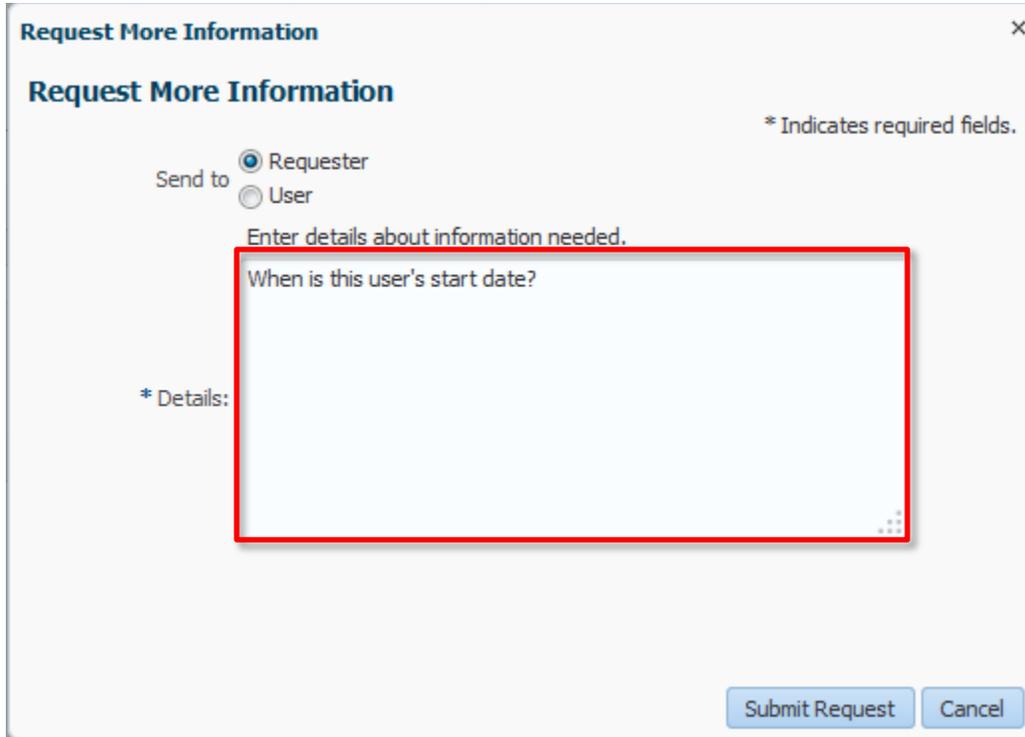
**Users** | Request Comments | Request History

View ▾

| User Display Name | User Login | Organization         | Details                      |
|-------------------|------------|----------------------|------------------------------|
| James November    | X4175929   | DCF Wichita Region E | <a href="#">View Details</a> |

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4. Enter question for the requestor. (Do not select User because the user will not have access to the OIM system to respond to the request.)



**Request More Information** [Close]

**Request More Information**

\* Indicates required fields.

Send to  Requester  
 User

Enter details about information needed.

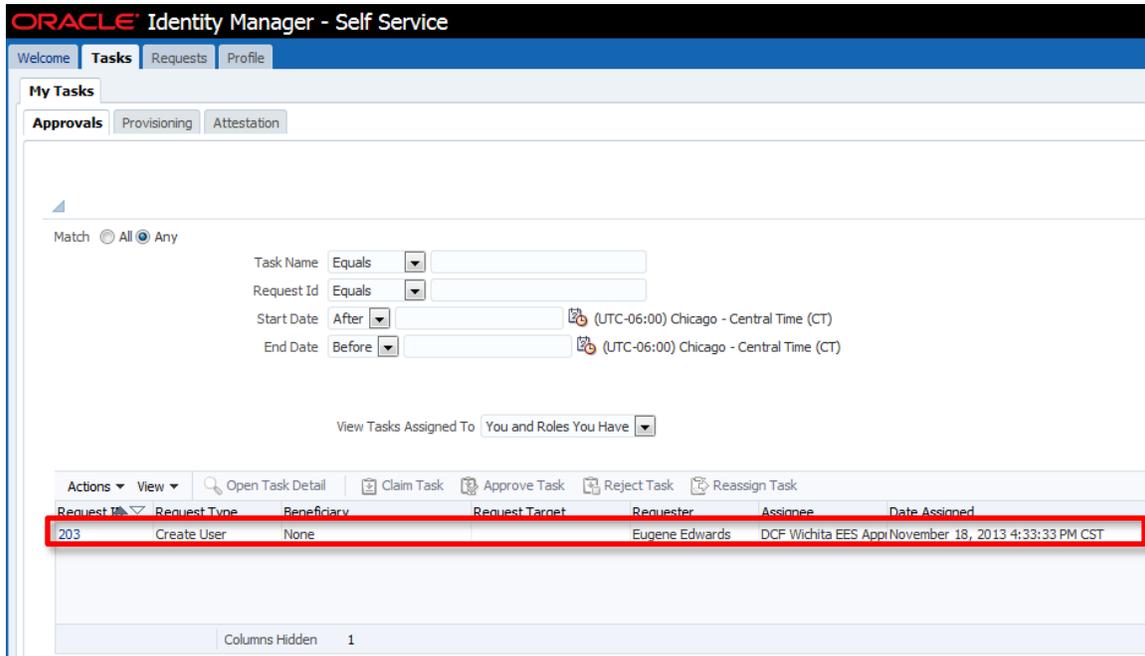
\* Details: [Text Area: When is this user's start date?]

[Submit Request] [Cancel]

5. Click on the Submit Request button.
6. A request message will be sent to the requester.
7. The task will also disappear from your Task list because the request is now reassigned back to the Requester to respond.

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8. After the requester responds to your inquiry, the task will re-appear on your Task list.



**ORACLE Identity Manager - Self Service**

Welcome | **Tasks** | Requests | Profile

**My Tasks**

Approvals | Provisioning | Attestation

Match  All  Any

Task Name: Equals [ ]  
 Request Id: Equals [ ]  
 Start Date: After [ ] (UTC-06:00) Chicago - Central Time (CT)  
 End Date: Before [ ] (UTC-06:00) Chicago - Central Time (CT)

View Tasks Assigned To: You and Roles You Have [ ]

Actions: View [ ] Open Task Detail [ ] Claim Task [ ] Approve Task [ ] Reject Task [ ] Reassign Task [ ]

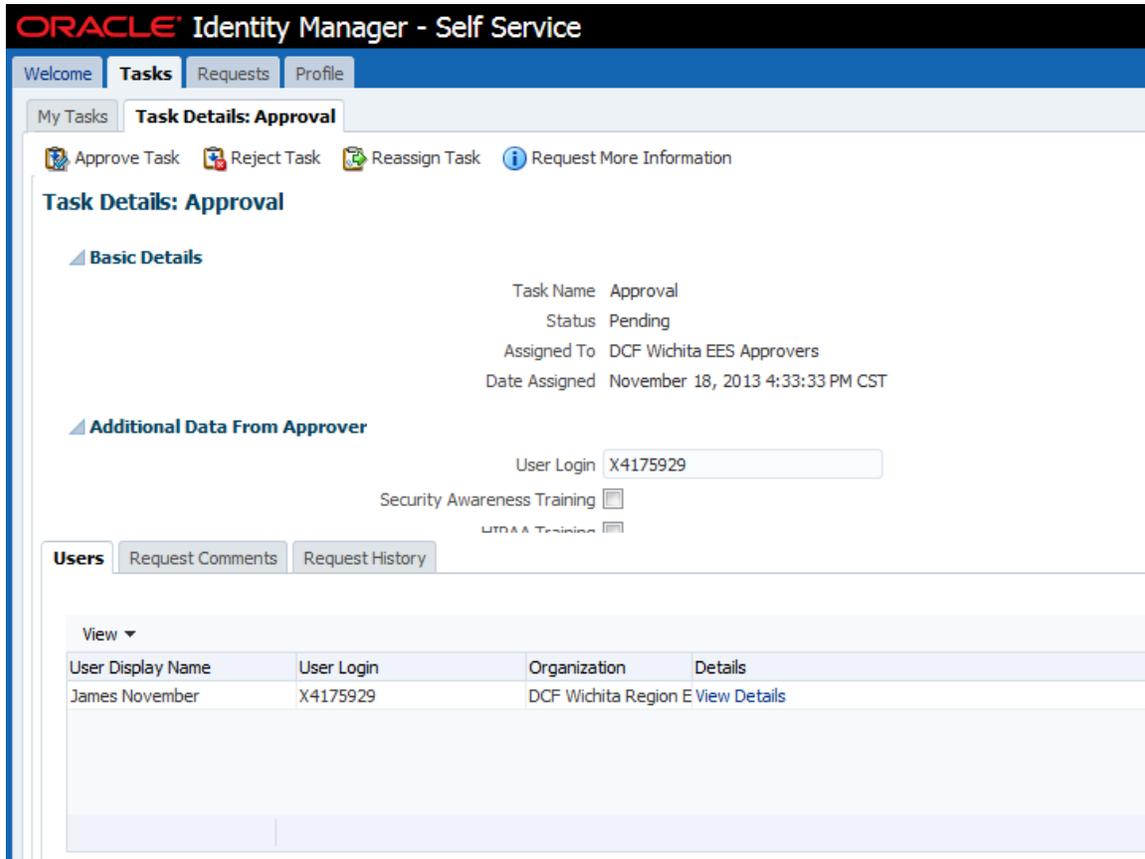
| Request ID | Request Type | Beneficiary | Request Target | Requester      | Assignee             | Date Assigned                    |
|------------|--------------|-------------|----------------|----------------|----------------------|----------------------------------|
| 203        | Create User  | None        |                | Eugene Edwards | DCF Wichita EES Appr | November 18, 2013 4:33:33 PM CST |

Columns Hidden: 1

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9. Select the task ID to view the task details.



**ORACLE Identity Manager - Self Service**

Welcome | **Tasks** | Requests | Profile

My Tasks | **Task Details: Approval**

Approve Task
 Reject Task
 Reassign Task
 Request More Information

**Task Details: Approval**

**Basic Details**

Task Name: Approval  
 Status: Pending  
 Assigned To: DCF Wichita EES Approvers  
 Date Assigned: November 18, 2013 4:33:33 PM CST

**Additional Data From Approver**

User Login:   
 Security Awareness Training:   
 HIPAA Training:

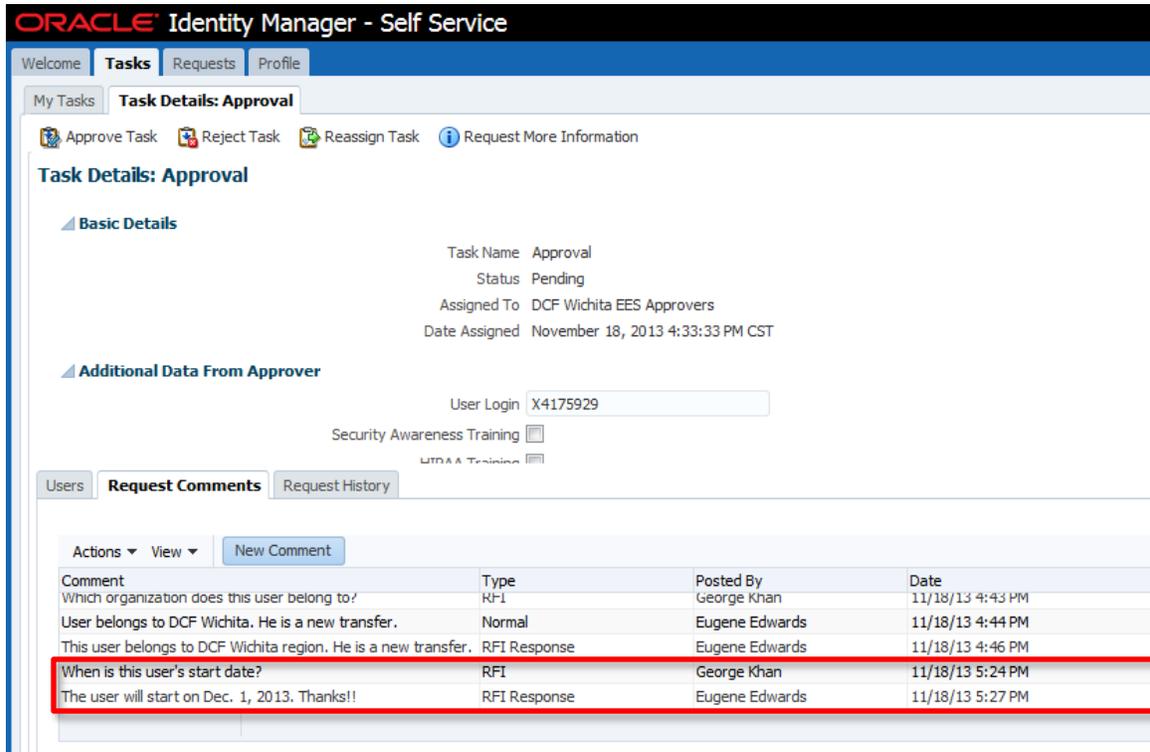
**Users** | Request Comments | Request History

View ▾

| User Display Name | User Login | Organization         | Details                      |
|-------------------|------------|----------------------|------------------------------|
| James November    | X4175929   | DCF Wichita Region E | <a href="#">View Details</a> |

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10. Select the Request Comments tab to view the response from the requester.



**ORACLE Identity Manager - Self Service**

Welcome | **Tasks** | Requests | Profile

My Tasks | **Task Details: Approval**

Approve Task | Reject Task | Reassign Task | Request More Information

**Task Details: Approval**

**Basic Details**

Task Name: Approval  
 Status: Pending  
 Assigned To: DCF Wichita EES Approvers  
 Date Assigned: November 18, 2013 4:33:33 PM CST

**Additional Data From Approver**

User Login: X4175929  
 Security Awareness Training:   
 LTRAA Training:

Users | **Request Comments** | Request History

Actions | View | New Comment

| Comment  | Type         | Posted By      | Date             |
|--|--------------|----------------|------------------|
| Which organization does this user belong to?                   | RFI          | George Khan    | 11/18/13 4:43 PM |
| User belongs to DCF Wichita. He is a new transfer.             | Normal       | Eugene Edwards | 11/18/13 4:44 PM |
| This user belongs to DCF Wichita region. He is a new transfer. | RFI Response | Eugene Edwards | 11/18/13 4:46 PM |
| When is this user's start date?                                | RFI          | George Khan    | 11/18/13 5:24 PM |
| The user will start on Dec. 1, 2013. Thanks!!                  | RFI Response | Eugene Edwards | 11/18/13 5:27 PM |

11. You may decide to Approve, Reject or Request More Information actions.