

# **State of Kansas**

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

---

## **KEES Submitter Training Document**

---

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

---

**October 30, 2013  
Version 1.0**

**accenture**



# KEES Project

## KEES Submitter Training Document

---

### TABLE OF CONTENTS

Document Change Log.....	3
1.0 Purpose.....	4
1.1 Roles .....	4
1.2 Approval Process .....	4
2.0 Submitting a new KEES user request.....	5
3.0 Responding to Additional Information Request .....	11



# KEES Project

## KEES Submitter Training Document

---

### Document Change Log

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



# KEES Project

## KEES Submitter Training Document

### 1.0 Purpose

This document is intended to be used as a job aid to help KEES Submitters to submit a new KEES user request. A KEES submitter is an appointed DCF or KDHE employee who is responsible for submitting new KEES user requests for a business area of a region.

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 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

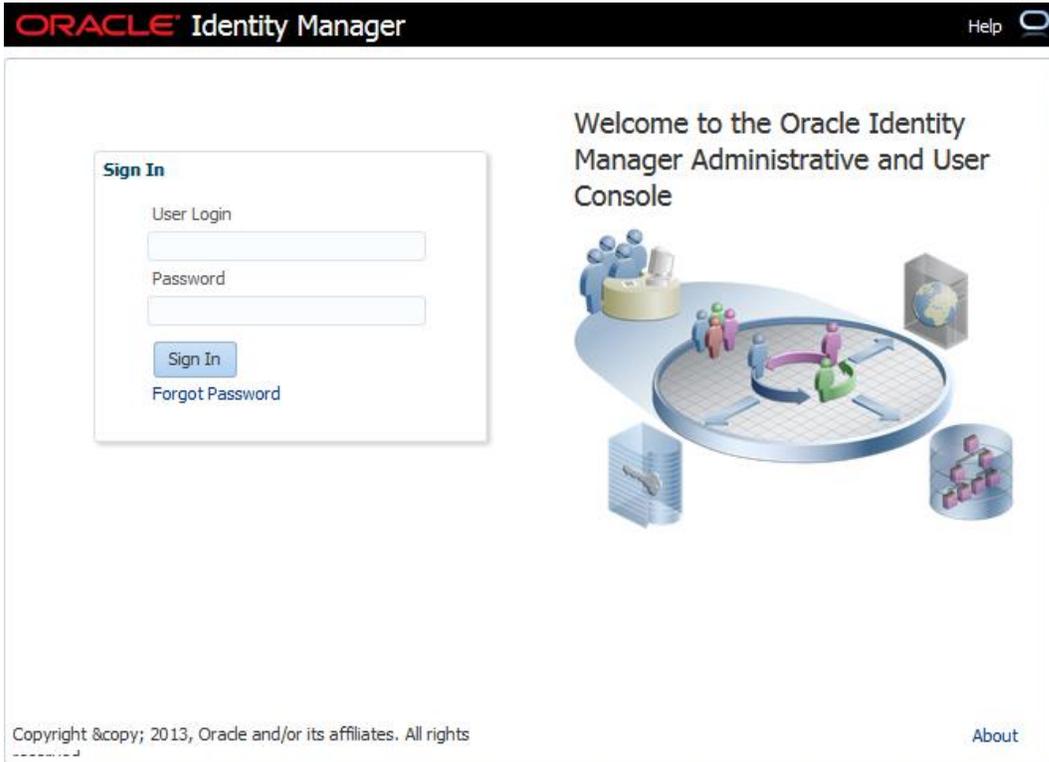
When a DCF or KDHE employee require access to the KEES system, they are required to submit a KEES user request by contacting their designated KEES Submitter for their region and business area. The KEES Submitter will use the provided user information to submit a request using the Oracle Identity Manager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

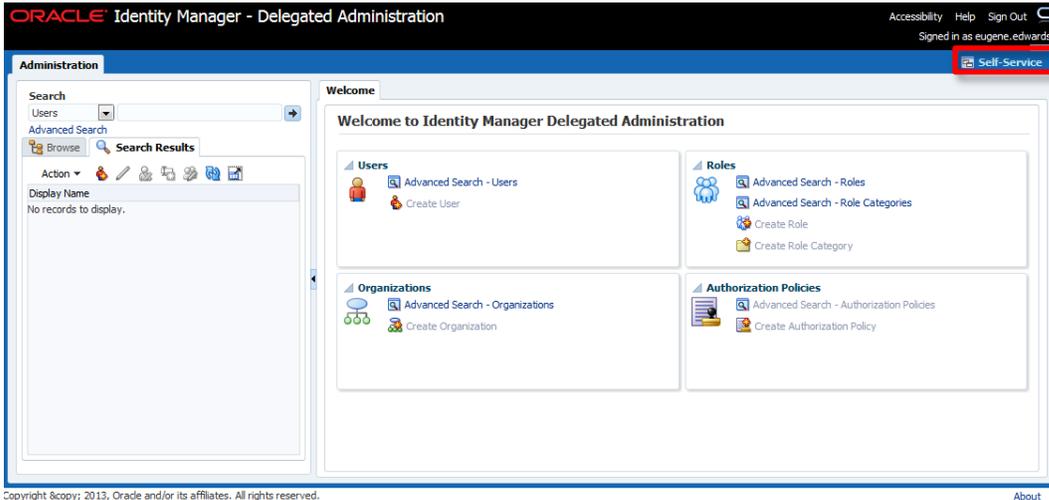
After the request is reviewed and approved by the KEES Business Approver of the user's region/business area, then OIM will route the approval request to the KEES security administrator. The KEES security administrator will validate that the user has completed the required training and submitted the required 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.

### 2.0 Submitting a new KEES user request

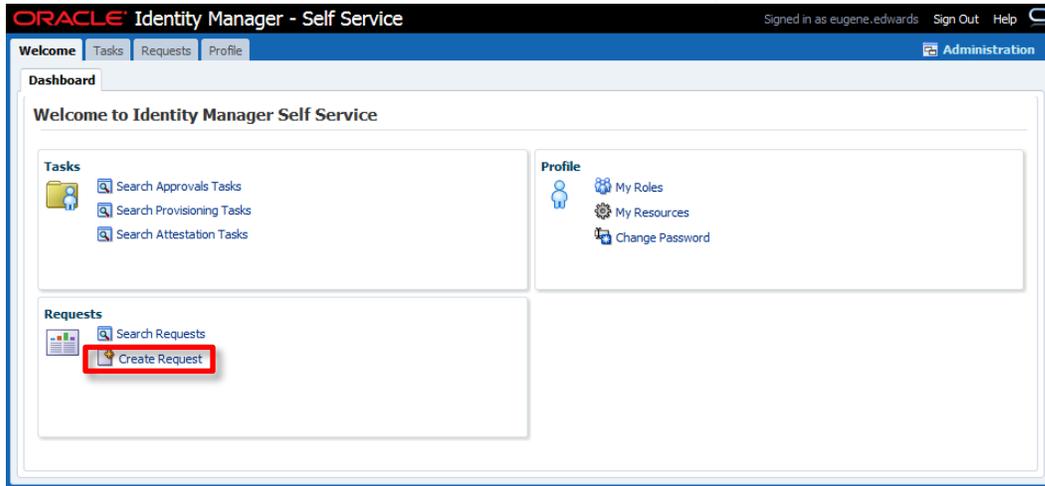
1. A KEES submitter logs in to the Oracle Identity Manager (OIM) administration console using their own user credentials, User Login and Password.



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



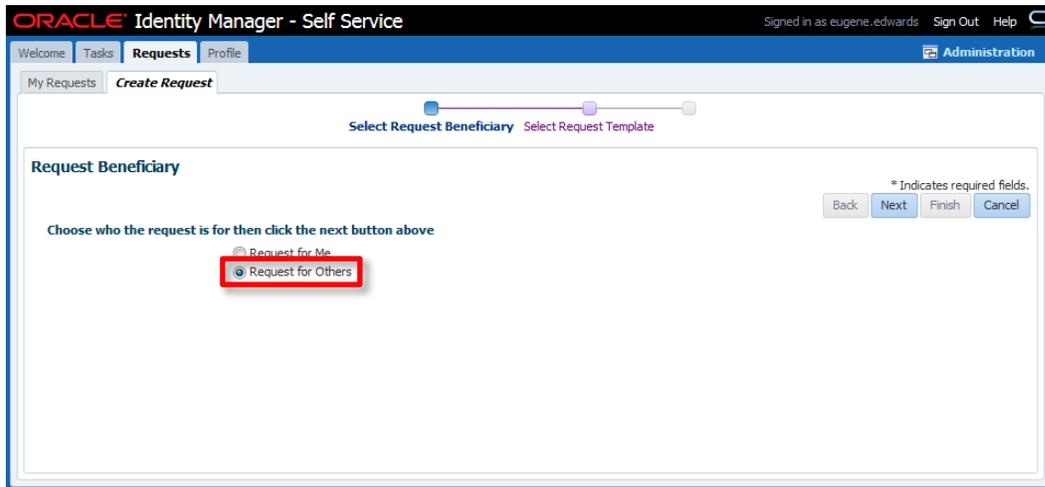
4. On the Self Service home page, select the “Create Request” link.



Copyright ©copy; 2013, Oracle and/or its affiliates. All rights reserved.

About

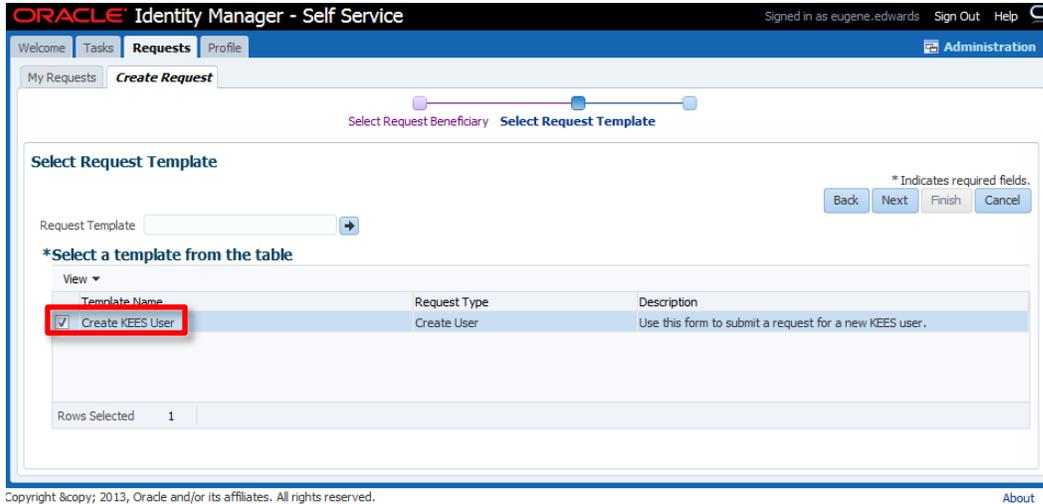
5. On the Request Beneficiary homepage, select “Request for Others” option and click on the “Next” button.



Copyright ©copy; 2013, Oracle and/or its affiliates. All rights reserved.

About

6. On the Select a template from the table homepage, select “Create KEES User” template and click on the “Next” button.

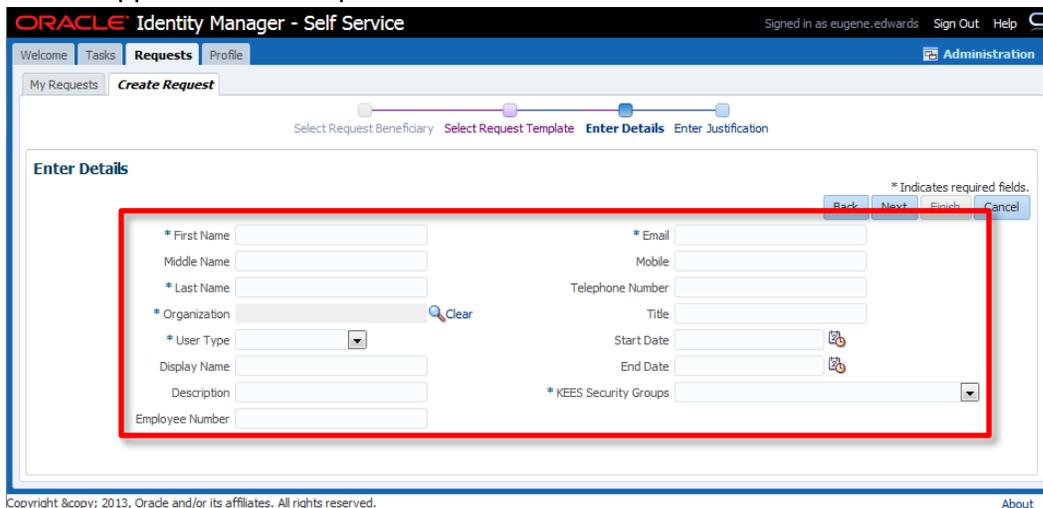


The screenshot shows the 'Select Request Template' page in Oracle Identity Manager Self Service. A progress bar at the top indicates the current step is 'Select Request Template'. Below the progress bar, there are buttons for 'Back', 'Next', 'Finish', and 'Cancel'. The main content area is titled 'Select Request Template' and contains a table with the following data:

Template Name	Request Type	Description
<input checked="" type="checkbox"/> Create KEES User	Create User	Use this form to submit a request for a new KEES user.

At the bottom of the table, it shows 'Rows Selected: 1'. The 'Next' button is highlighted in blue.

7. On the Enter Details homepage, enter the new KEES user information.
  - a. Hint: It is recommended to enter as much information as possible to help facilitate faster approval of the request.



The screenshot shows the 'Enter Details' page in Oracle Identity Manager Self Service. A progress bar at the top indicates the current step is 'Enter Details'. Below the progress bar, there are buttons for 'Back', 'Next', 'Finish', and 'Cancel'. The main content area is titled 'Enter Details' and contains a form with the following fields:

- \* First Name (Required)
- Middle Name
- \* Last Name (Required)
- \* Organization (Required)
- \* User Type (Required)
- Display Name
- Description
- Employee Number
- \* Email (Required)
- Mobile
- Telephone Number
- Title
- Start Date
- End Date
- \* KEES Security Groups (Required)

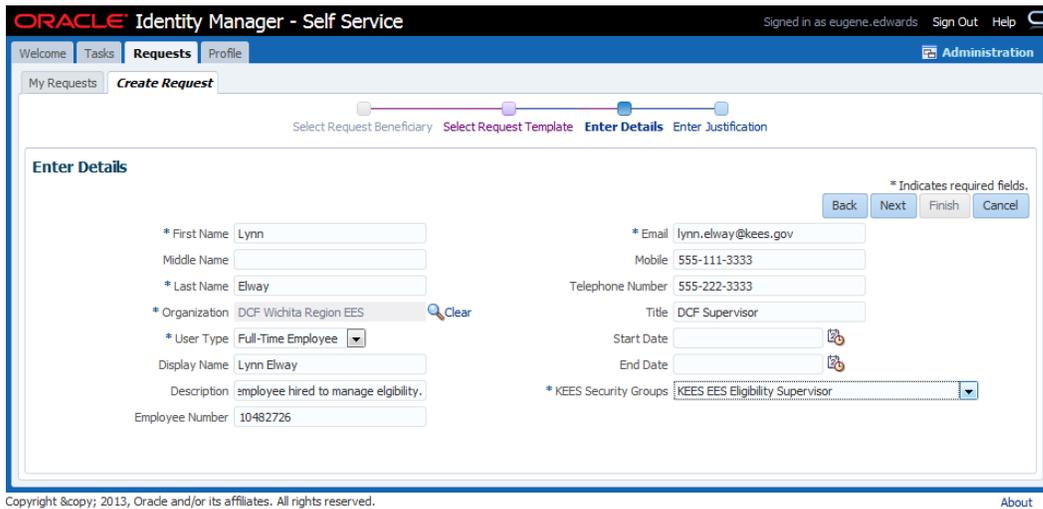
A red box highlights the entire form area.

Form Field	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

# KEES Project

## KEES Submitter Training Document

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.
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.



**ORACLE Identity Manager - Self Service** | Signed in as eugene.edwards | Sign Out | Help

Welcome | Tasks | **Requests** | Profile | Administration

My Requests | **Create Request**

Select Request Beneficiary | Select Request Template | **Enter Details** | Enter Justification

**Enter Details**

\* Indicates required fields.

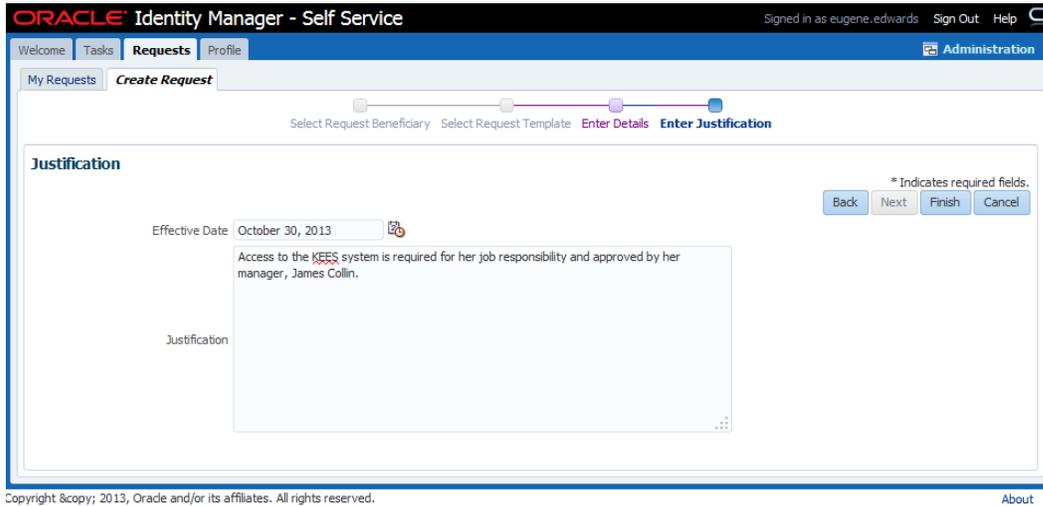
Back | Next | Finish | Cancel

\* First Name: Lynn  
Middle Name:   
\* Last Name: Elway  
\* Organization: DCF Wichita Region EES  
\* User Type: Full-Time Employee  
Display Name: Lynn Elway  
Description: employee hired to manage eligibility.  
Employee Number: 10482726

\* Email: lynn.elway@kees.gov  
Mobile: 555-111-3333  
Telephone Number: 555-222-3333  
Title: DCF Supervisor  
Start Date:   
End Date:   
\* KEES Security Groups: KEES EES Eligibility Supervisor

Copyright &copy; 2013, Oracle and/or its affiliates. All rights reserved. | About

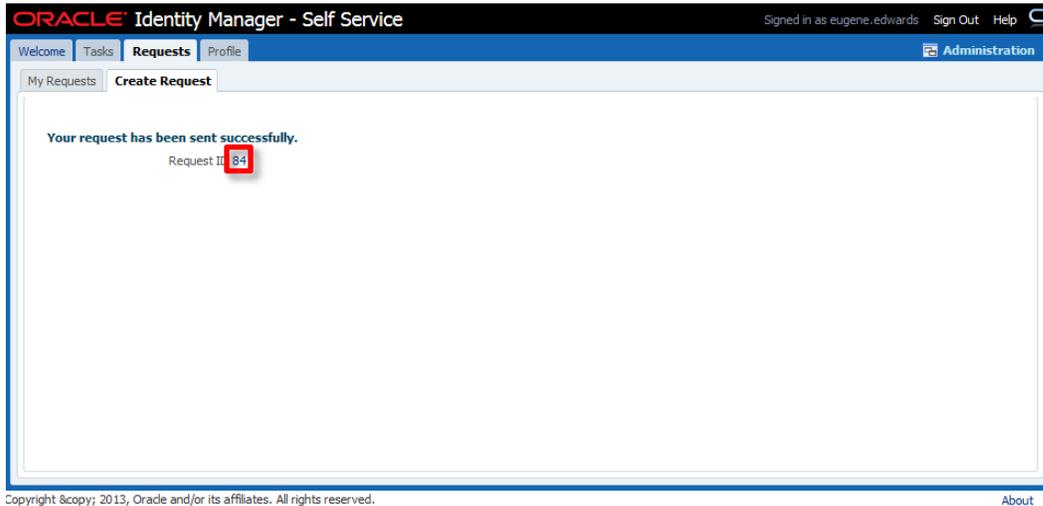
8. After entering the user information, click on the “Next” button.
9. On the Justification homepage, enter the justification details for this request.
  - a. The Effective Date is only used as a reference for the approvers.
  - b. The Justification comments are available for the approvers to review.



The screenshot shows the 'Enter Justification' step in the Oracle Identity Manager Self Service interface. The breadcrumb trail is 'My Requests > Create Request > Enter Justification'. The 'Justification' section contains an 'Effective Date' field with the value 'October 30, 2013' and a 'Justification' text area containing the text: 'Access to the KEES system is required for her job responsibility and approved by her manager, James Collin.' To the right of the text area are buttons for 'Back', 'Next', 'Finish', and 'Cancel'. A legend indicates that an asterisk (\*) denotes required fields. The 'Next' button is highlighted in the original image.

Copyright ©copy; 2013, Oracle and/or its affiliates. All rights reserved. About

10. After entering the justification, click on the “Finish” button to submit the approval request. The system will display a request ID for your reference.



The screenshot shows the success message in the Oracle Identity Manager Self Service interface. The message reads: 'Your request has been sent successfully.' Below the message, the 'Request ID' is displayed as '84', which is highlighted with a red box in the original image. The breadcrumb trail is 'My Requests > Create Request'. The 'Next' button is highlighted in the original image.

Copyright ©copy; 2013, Oracle and/or its affiliates. All rights reserved. About

# KEES Project

## KEES Submitter Training Document

11. You may click on the Request ID number to view details of the request. The information on the request details is for the approvers to review. The user has not been created in the KEES system yet and they will not be allowed to login to the system until their request has been approved.

**ORACLE Identity Manager - Self Service** Signed in as eugene.edwards Sign Out Help

Welcome Tasks **Requests** Profile Administration

My Requests **Request Details: 84**

Withdraw Request Refresh

**Request Details: 84** \* Indicates required fields.

**Request Information**

Request ID	84	Beneficiary	
Request Type	Create User	Access to the KEES system is required for her	
Status	Obtaining Operation Approval	Justification job responsibility and approved by her manager,	
Date Requested	October 30, 2013 6:17:28 PM CDT	James Collin.	
Effective Date	October 30, 2013 12:00:00 AM CDT	Parent Request ID	
Requester	Eugene Edwards		

**Users** Request Comments **Request History** Approval Tasks

View ▾

User Display Name	User Login	Organization	Details
Lynn Elway	X8569734	DCF Wichita Region E	View Details

Copyright ©copy; 2013, Oracle and/or its affiliates. All rights reserved. About

12. Click on the “Request History” tab to review the status of the request.

**ORACLE Identity Manager - Self Service** Signed in as eugene.edwards Sign Out Help

Welcome Tasks **Requests** Profile Administration

My Requests **Request Details: 84**

Withdraw Request Refresh

**Request Details: 84** \* Indicates required fields.

**Request Information**

Request ID	84	Beneficiary	
Request Type	Create User	Access to the KEES system is required for her	
Status	Obtaining Operation Approval	Justification job responsibility and approved by her manager,	
Date Requested	October 30, 2013 6:17:28 PM CDT	James Collin.	
Effective Date	October 30, 2013 12:00:00 AM CDT	Parent Request ID	
Requester	Eugene Edwards		

Users Request Comments **Request History** Approval Tasks

View ▾

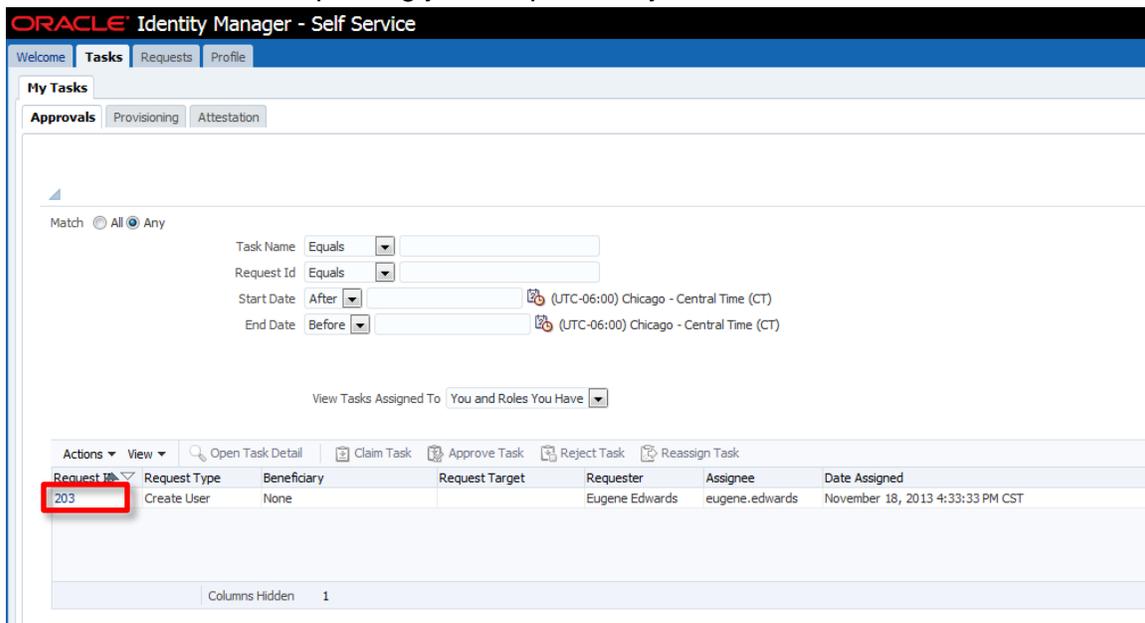
Status	Updated On	Updated By
Request Created	October 30, 2013 6:17:28	Eugene Edwards
Template Approval Auto Approved	October 30, 2013 6:17:28	Internal User
Request Approval Auto Approved	October 30, 2013 6:17:28	Internal User
Obtaining Operation Approval	October 30, 2013 6:17:28	Internal User

Copyright ©copy; 2013, Oracle and/or its affiliates. All rights reserved. \_afWindowMode=0&\_afrlLoop=248745451125000&\_adf.ctrl-state=c4o0kzdbp\_14# About

### 3.0 Responding to Additional Information Request

Sometimes, the approver may send a request back to you for additional information or clarification. The request and response are tracked inside OIM. When you get notified of a request for more information, you can view these requests in the OIM console.

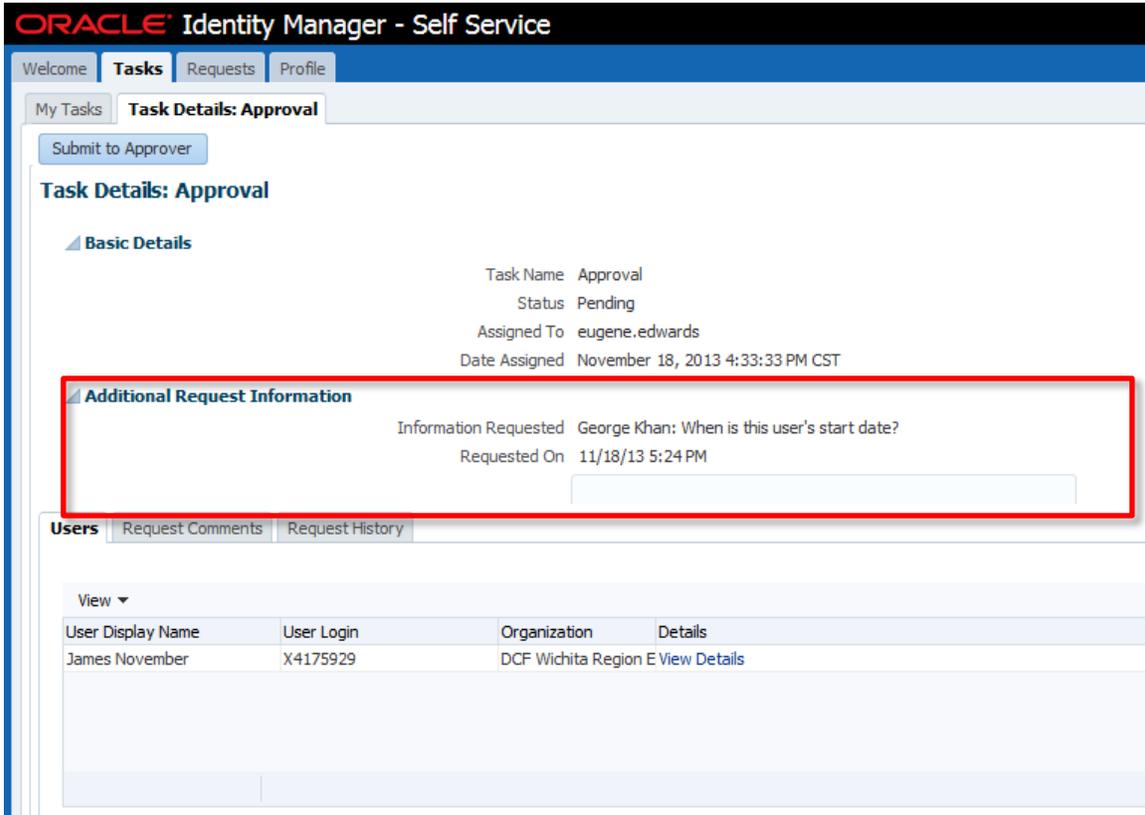
1. Login to the OIM system.
2. Click on the “Self Service” tab to view the Self Service homepage.
3. Click on the “Tasks” tab.
4. You will see the task requesting your response in your task list.



The screenshot shows the Oracle Identity Manager - Self Service interface. The 'Tasks' tab is selected, and the 'My Tasks' section is active. Below the navigation tabs, there are search filters for Task Name, Request Id, Start Date, and End Date. A table below shows a list of tasks with columns for Request ID, Request Type, Beneficiary, Request Target, Requester, Assignee, and Date Assigned. The first row in the table has a red box around the Request ID '203'.

Request ID	Request Type	Beneficiary	Request Target	Requester	Assignee	Date Assigned
203	Create User	None		Eugene Edwards	eugene.edwards	November 18, 2013 4:33:33 PM CST

5. Click on the Task ID to view the Task Details.
6. Under the “Additional Request Information” section, you will see the comments that the approver submitted.



The screenshot shows the Oracle Identity Manager - Self Service interface. The main heading is "ORACLE Identity Manager - Self Service". Below this, there are navigation tabs: "Welcome", "Tasks", "Requests", and "Profile". The "Tasks" tab is active, and within it, "Task Details: Approval" is selected. A "Submit to Approver" button is visible. The "Task Details: Approval" section is expanded, showing "Basic Details" and "Additional Request Information". The "Basic Details" section includes: Task Name: Approval, Status: Pending, Assigned To: eugene.edwards, and Date Assigned: November 18, 2013 4:33:33 PM CST. The "Additional Request Information" section is highlighted with a red box and contains: Information Requested: George Khan: When is this user's start date? and Requested On: 11/18/13 5:24 PM. Below this, there are tabs for "Users", "Request Comments", and "Request History". The "Users" tab is active, showing a table with columns: User Display Name, User Login, Organization, and Details. The table contains one row: James November, X4175929, DCF Wichita Region E, and a "View Details" link.

7. Enter a response in the response comment field.

**ORACLE Identity Manager - Self Service**

Welcome | **Tasks** | Requests | Profile

My Tasks | **Task Details: Approval**

Submit to Approver

**Additional Request Information**

Information Requested: George Khan: When is this user's start date?  
 Requested On: 11/18/13 5:24 PM

\* Response

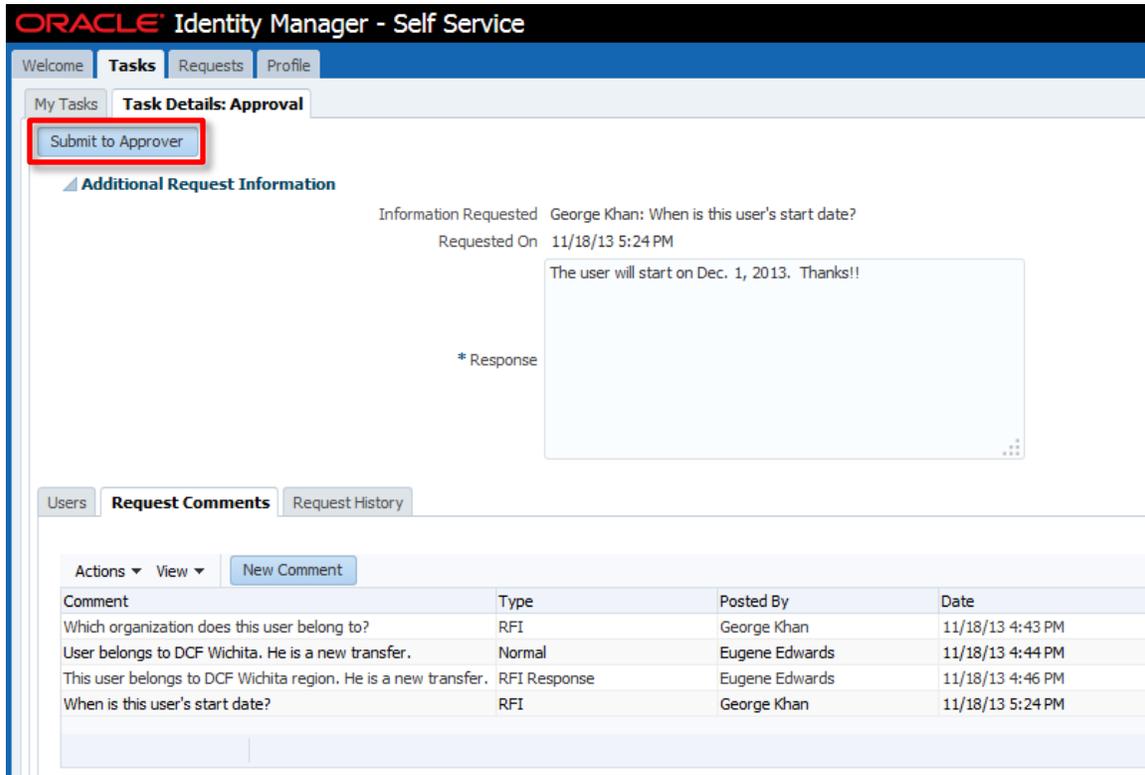
The user will start on Dec. 1, 2013. Thanks!!

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

- Click on the “Submit to Approver” button to respond to the approver.



**ORACLE Identity Manager - Self Service**

Welcome | **Tasks** | Requests | Profile

My Tasks | **Task Details: Approval**

**Submit to Approver**

**Additional Request Information**

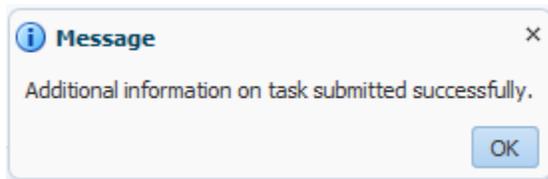
Information Requested: George Khan: When is this user's start date?  
 Requested On: 11/18/13 5:24 PM

\* Response: The user will start on Dec. 1, 2013. Thanks!!

Users | **Request Comments** | Request History

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

- Your response has been submitted back to the approver for review.



- Note: You may review the request/response history in the “Request Comments” tab in the Request Details.