Administration of the DHHS e-Business Environment

Organisation Authority Guide

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General conventions and typographical standards

Item	Convention	What to Use
Buttons, fields, menus, options, selections and user input.	Bold, capitalisation as required, e.g. Type **b** in the **Gen** field and click **OK**. Select **Print** from the **File** menu.	Manually apply

Commands	Courier New 10 point bold, colour is dark magenta, e.g.
	`#  /sbin/init.d/openmail stop`
	and
	`Format c:`
		The **Command** character style

Emphasis	BoldItalic, e.g. Do **not** drink the water.	Manually apply
Filenames, volumes and paths, script, code etc.	Courier New 10 point (sometimes 9pt due to space) blue, e.g. `c:\windows\system\`	The most appropriate of the six **Ascii** styles (4 paragraph and 2 character styles)
Important information - Notes and Caution	Notes commence with ➤ and have a blue line above and below. Caution is the same except it commences with 🛑 and lines are red and double.	AutoText entry **Note** AutoText entry **Caution**
Keyboard keys	Bold in square brackets, e.g. **[Enter]**.	Manually apply
Messages or responses received from the system	Courier New 10 point and boxed, e.g. `Do you really want to quit?`	The **Messages** style
Reference - external	References to other documents are italic and commence with 📖, e.g. See the *Notes Application Developer's Guide.*	AutoText entry **Reference**
Reference - internal	Are italic and use two Word cross-references, one to heading number and the other to heading text.	Apply using Word Cross Reference facility
Titles, window and screen names, dialog boxes, titles, icons etc.	Initial capitals, except where the title needs to conform to the actual system being documented.	Manually apply

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1. Document Control

1.1 Versions

Version	Release Date
1.0	
2.0	
3.0	
4.0	20/12/2005
4.1	3/1/2006
5.0	28/06/2019
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7.1	3/1/2006
8.0	24/06/2019

1.2 Authorisations

Name	Position	Signature	Date
Madonna Doherty	Team Leader and Licensing Specialist		24/06/2019

2. Introduction

2.1 Purpose and Scope

The purpose of this document is to describe the responsibilities of the Organisation Authority (OA); and to outline the procedures to be followed to fulfil these same responsibilities.

All Organisational Authorities must be familiar with and follow the procedures outlined in the document to ensure the fluid administration of the Department's eBusiness environment.

2.2 Obtaining the latest version of this document

External business partners may obtain copies of this document from the appointed Departmental contact for their application.

2.3 Audience

This document is for use by:

- The Department's business area managers responsible for the development of eBusiness applications;

- Application (Technical) Project Managers;

- Application Development staff;

- Organisation Authorities; and

- Internal business areas and external business partners and their staff engaged in supporting the Organisation Authority structure.

3. Delegated Administration Model

Administration of the Department's eBusiness environment is a complex task and this complexity is likely to increase as additional applications and users are connected to the environment. This complexity arises from the necessary security measures required to support external access to the Department's systems. A centralised administration model was considered during the formulation stage, but was rejected on the basis that a central administrator would have limited direct knowledge of the applications, organisations and users for which he/she would be responsible.

Instead, administration of the Department's eBusiness environment has been setup with the capacity to allow for many of the administrative tasks to be conducted by the individuals with the greatest interest in the correct administration of these tasks. In other words, the management of the Department's eBusiness environment is based upon a **Delegated Administration Model**.

Under this Delegated Administrative Model, there are a number of key roles associated with the administration of the eBusiness environment:

- A **User** is a departmental person, or an individual from a business partner of the department, or a member of the public who has a need to access the Department's eBusiness applications. Users of eBusiness are responsible for user 'self-care'.

- An **Organisational Authority** is a departmental or non-departmental person who manages key administrative tasks on behalf of their division, region, business unit or external organisation, who have potential & registered users using the eBusiness environment;

- An **Application Administrator** is a departmental person responsible for managing one or more applications within the eBusiness environment; and

- The **eBusiness Administrator** is a departmental person appointed from the Information Services Branch (ISB) and is responsible for the high-level management of the eBusiness environment. **Help Desk** staff have a similar role to the eBusiness Administrator.

4. Roles and Responsibilities

4.1   Organisation Authority Role

The role of the OA applies to both departmental business areas and external business partners. The OA role is to validate and manage user and organisational matters related to their business area in respect of eBusiness. The OA is seen as a key local resource having inherent knowledge and capability to undertake the initial screening of applicants requesting registration within their organisation, as well as, being a conduit of information about organisational change for their organisation and users.

The implementation of the OA structure ensures that all user and organisational related matters are dealt with and are kept current and accurate.

The roles undertaken by the primary or secondary OA are essentially the same. There is value in delegating the OA role, in that; the secondary OA would be a backup to the primary OA in situations where the primary OA is unavailable for a period of time due to, for example, recreation leave or sick leave.

4.2   Organisation Authority Responsibilities

A cornerstone to the administrative model is the presence of Organisation Authorities. These people have the following responsibilities:

- Verifying the identity of an unregistered user; that is, their bona fides (***Is the person who they claim to be?***);

- Validating the organisational and role details of the unregistered users request for registration (***Is this the actual job they are doing?***);

- Verify that the employee's job/position within the agency warrants them to have access to the requested eBusiness application (***Should this staff member have access to that application?***);

- Maintaining the organisational details of their organisation (for example, has the organisation changed its name);

- Maintaining the currency of the registered eBusiness users for their organisation (for example, advice on de-registering user accounts); and

- Further delegate the OA role to secondary organisation Authorities where necessary (this applies to primary OA's only).

5. How Business areas select an Organisation Authority?

Success in the management of users is premised on the appointment of key individuals to undertake the role of the OA and to have in place an OA structure. OA's are appointed from each of the Department's business areas and external business partners.

The delegated model is hierarchical in nature, and any organisation/business area may have a primary and secondary OA's. The Primary OA may choose to create child organisations of the parent and each child organisation can have a primary and secondary OA's. Each organisation can be associated with a parent organisation. The OA of the parent organisation can create child organisations. The Primary OA for the child organisation could, in turn, create one or more secondary OA's to support that organisation.

The OA could appoint one or more secondary OA's within their work unit or business area. Alternatively they could create child organisations for each of the business/ program areas and appoint a Primary OA to each.

For external business partners, the following example would apply. The Southern Health Care Network will have a primary OA. The Primary OA can create many child organisations such as Dandenong Hospital, Hampton Rehabilitation Hospital, Kingston Centre and Monash Medical Centre and so on; and each child organisation would have a primary OA appointed and they may wish to appoint one or more secondary OA's.

Business areas and business partners will be asked to nominate a key person(s) within their organisation to be appointed as an OA. This is a <u>mandatory</u> requirement in order for business areas and business partners and their staff to have access to any eBusiness application.

5.1   What to consider in selecting a suitable OA?

A suitable OA should have knowledge of, or access to information to make the following assessments on behalf of the organisation:

- Confirm the bona fides of the employee as part of the registration process (that is, that the person is who they claim to be and that their role description accurately reflects their position within the agency). Access to HR related information and or knowledge of employees would be beneficial; and

- Sufficient knowledge and understanding of their own organisational structure.

In addition, the role requires that the OA have access to:

- An internet configured PC to use the Department's eBusiness User Registration Application or Departmental PC on HSNet (the Department's private network); and

- His/her own email account (not generic or group account) for administrative purposes.

5.2   Who Approves a Registration Request where no OA is Appointed?

If an unregistered user submits a request for registration and this person is not linked to an OA, the responsibility to validate the Registration Request will be forwarded to the Application Administrator whose application has been requested in the registration form. As well as validating the registration request, the Application Administrator will also need to determine whether to grant or deny access to their application.

6. Roll-Out Strategy for Implementation of the OA Structure

6.1 External Business Partners

Business partners will be required to agree and sign a "Deed of Confidentiality" as a mandatory requirement to access the eBusiness environment. The purpose of the "Deed of Confidentiality" is to ensure that business partners, whose staff will use the Department's eBusiness applications, have in place measures and practices that will augment security of the Department's data when it is outside the Department's physical control.

The Deed will be entered into by an organisation and will apply to those eBusiness applications developed specifically for access by the Department's business partners. The Department's business partners will be required to agree and sign the deed before their organisation will be registered in the system and access granted to those specific eBusiness applications. Staff from an organisation not willing to sign the deed will not be given access to the Department's eBusiness business partner applications, although some application administrators may grant access to registered members of the public.

The deed further requires that all Organisations nominate at least a *'Primary'* OA for their organisation. Appointment of an OA is a mandatory requirement for access to any ebusiness business partner applications.

6.1.1 The OA process works in the following way

Prior to an application being released into production, the business application owner will need to provide to the eBusiness Administrator a list of internal business areas and external business partners who will have access to their application.

The eBusiness Administrator, on behalf of the application owner, will verify if an OA is required for those business areas or organisations. An eBusiness information kit, including the "Deed of Confidentiality", will be forwarded to the organisation requesting that this deed to be signed and an OA be nominated.

Upon receipt of the signed Deed, the eBusiness Administrator will register the organisation and their nominated OA's onto the eBusiness User Management system. From that time onwards all registration requests to access the eBusiness applications will be forwarded to the nominated OA for validation.

7. Accessing the EUS Administrative Application

Organisation Authorities must be registered eBusiness users and must have access to the EUS application.

To access the **eBusiness Login** button follow these steps.

1. Open the browser on your PC

2. Click on the address box and type in the following URL : http://www.dhhs.vic.gov.au and press **Enter**

   The URL will take you to the main Department of Health and Human Services Internet Homepage.

3. You may wish to store this URL for future access. Please follow the instructions provided by your browser.
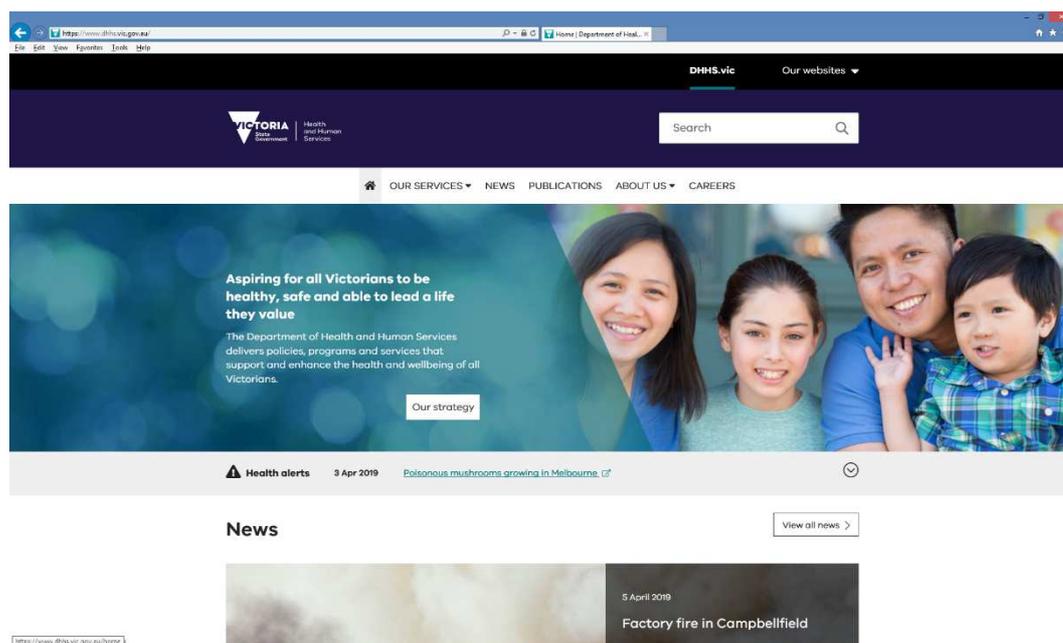
4. Enter 'eBusiness' in the Search field and press **Enter** or click the Search icon 🔍 .
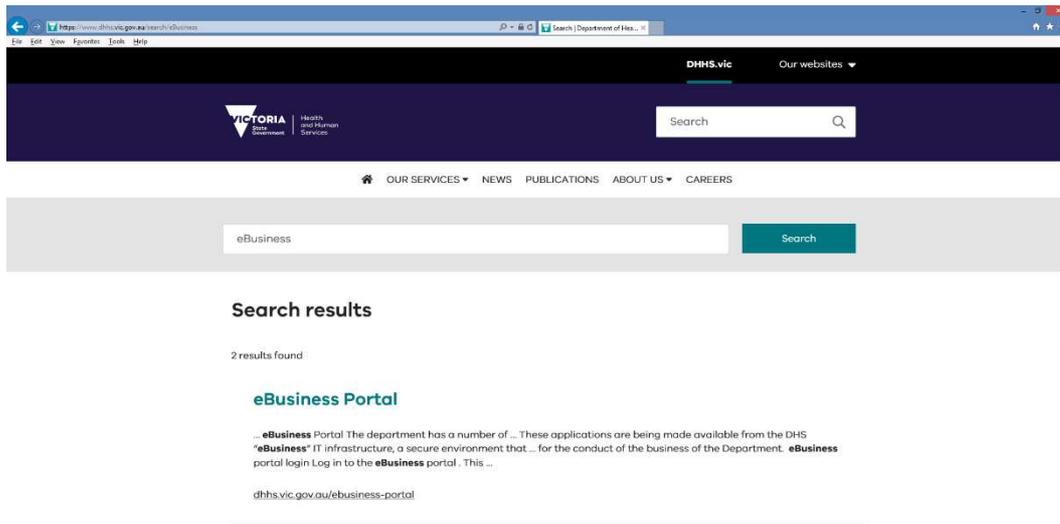
5. Click on the eBusiness Portal search result
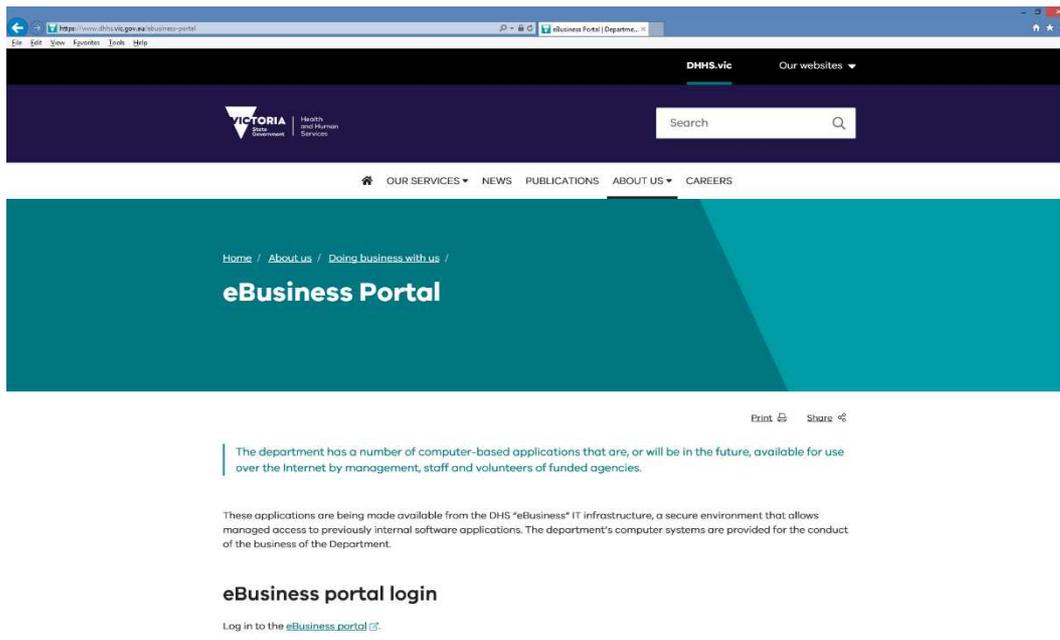
Click on the eBusiness Portal login link

The system then displays the eBusiness login page.

Enter your username and password and the eBusiness Portal page appears.
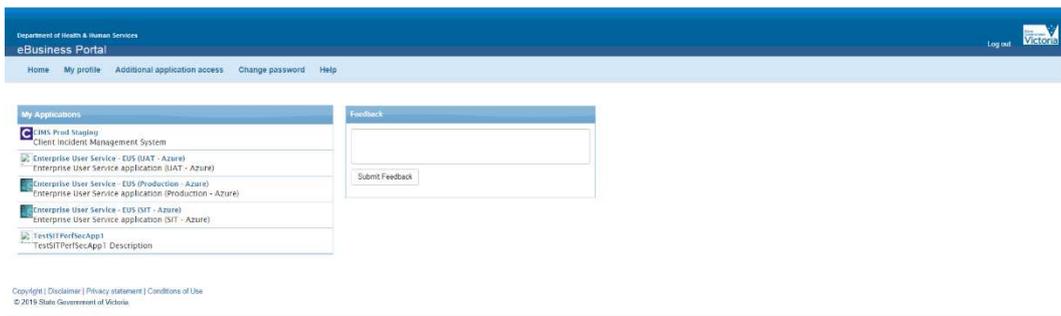
EUS should appear as one of the applications in the left side panel.

8. Validate Registration Requests

This section describes the steps taken to validate or reject a user's validation request.

Organisation Authorities are notified by email when there are requests awaiting their attention.

From the menus on the left of the page, select **Validate Registration**. The system displays a list of outstanding requests.

To process a request click on the request id and additional detail appear.
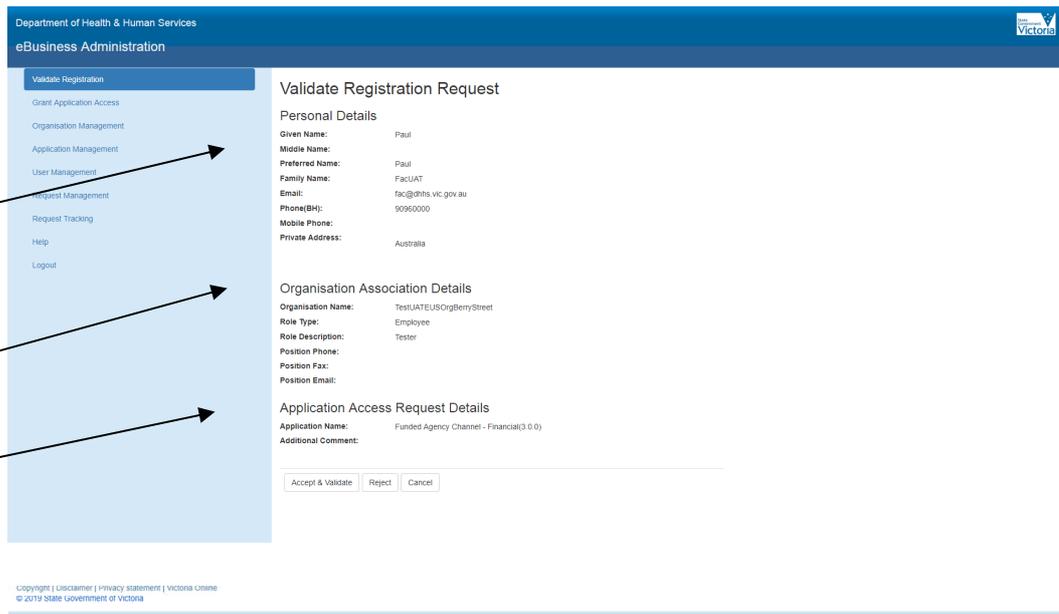
From here, the Organisation Authority needs to confirm the following prior to validating the request.

1. The person is who they claim to be;

2. The person works for the said organisation and their role is accurately reflected within the registration request; and

3. Determine if the person's job/position within the organisation warrants them to have access to the requested eBusiness application.

The Organisation Authority cannot alter any details at this point. The options are to cancel the process and return to the list, or the Organisation Authority can validate or reject the request.

If the request if validated, the request is removed from the list and the workflow continues.
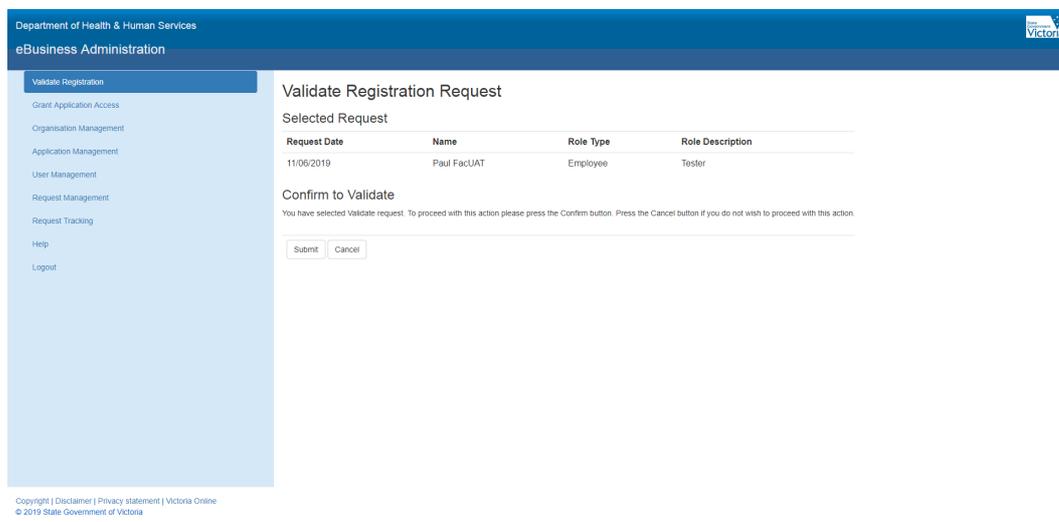
If the request is rejected, a new page appears allowing the reason for the rejection to be entered.
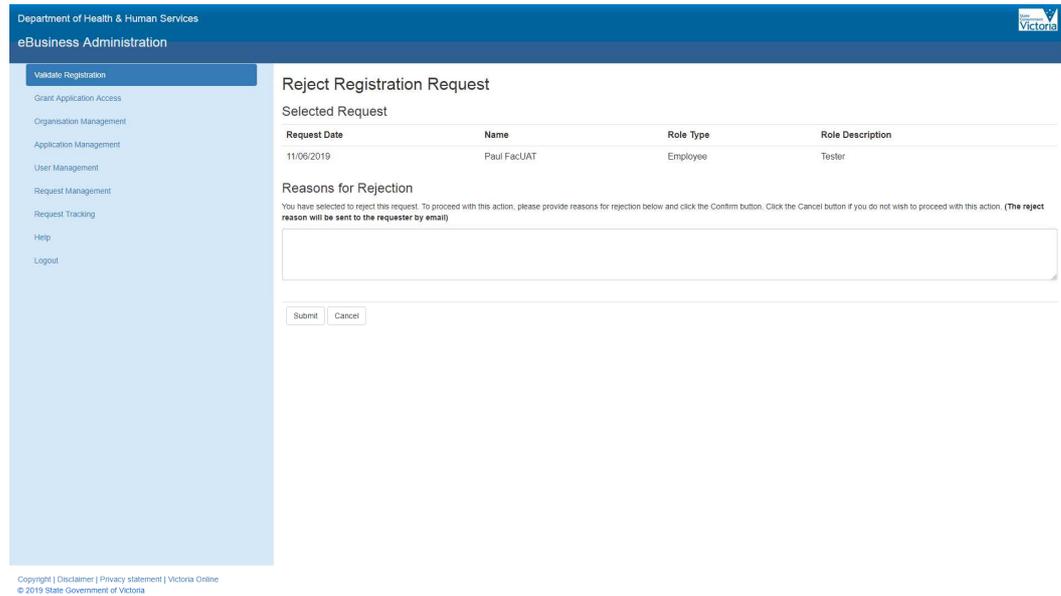
The requestor will receive an email containing details of the rejection, including the reason.

The primary reasons that an Organisation Authority should reject a request is if they are in doubt that the requestor is the person they purport to be, or that the details they have submitted are incorrect.

9. Manage Organisations

This facility is intended for use by Organisation Authorities to manage information about their own organisation, and for the eBusiness Administrator to manage information about all organisations.

It provides the functionality to search for organisations, view and edit the details of an organisation, register new organisations, assign Organisation Authorities and manage the association between organisations.

The Manage Organisations facility is accessed via the EUS Administrative application and the **Organisation Management** menu.

9.1   Finding Organisations

The Find Organisations page is always the starting point for organisation management.

There are thousands of Organisation records in the directory, so a general search with no criteria is slow and a poor method of finding an organisation.

The **Organisation Name** field allows limiting the search to organisations with names starting with the word(s) entered in this field. EUS ignores case.

The **Get Top-Level Only** check box allows limiting the search to organisations that have no parent organisation. This is only about 10% of the total number of organisations.

The various pick lists allow organisations of certain types or services to be selected.

The **Show Closed** option allows closed organisations to be excluded from the search.

The results set of the search is displayed in summary format.

The search result page shows the total number of records found and has navigation links at the bottom of the list to jump to different pages. The list can also be re-ordered by clicking on a column name, and clicking a 2nd time on the same column displays the list in reverse order. For example, clicking on the **Name** icon reverses the order of the organisations.

9.2   Find Associated Organisations

Some organisations have a 'parent' organisation, and some can have 'child' organisations. The arrows on the left of the results page allow the organisational tree to be navigated.

For example, clicking on the ⬚ against 'Baptcare Ltd' in the list displays its 'child' organisations.

Each of these 'child' organisations has a ⬚ symbol, which moves back up to the parent level. Clicking on the 'child' organisation ⬚ symbol allows any lower level organisations to be viewed.

9.3   View and Edit Organisation Details

The organisation name link in the Find Organisations results page allows details of the selected organisation to be viewed and updated. For example, selecting the 'Family Services Division of Baptcare' link would display its details.

Scrolling down would display

and then:

Organisation Authorities and the eBusiness Administrator use this page to:

- Register a new organisation as a 'child' of the current organisation.

- Edit the organisation details, such as the name.

- Change the Organisation Authority or add or remove Secondary Organisation Authorities.

- Alter the 'parent' organisation.

- Record the closure of the organisation.

Note that Organisation Authorities are not authorised to do all these tasks.

9.4   Registering a New Organisation

Organisation Authorities can only register 'child' organisations of their own organisations. The EUS Administration Organisation Management tool allows this once an organisation has been located by clicking on the **Register Child Organisation** button.

The eBusiness Administrator has the additional access level to register new top level organisations by selecting the **Register Top Level Organisation** button on the search results page.

10. Manage Users

This facility is intended for use by the eBusiness Administrator, Application Administrators and Organisation Authorities to find, view and edit user details and revoke application access.

The Manage Users facility is accessed via the EUS Administrative application and the **User Management** menu.

10.1   Finding Users

Selecting **User Management** displays the following page:

Find User allows the administrator to locate users by selecting one or more criteria. Although the system will search for unspecific selection criteria, there are thousands of users in the directory, and large searches may time out prior to returning a result.

The options for searching include:

- Selecting for users of a particular application

- Selecting by entering a username (or part of a username)

- Selecting by Given Name or Family Name (or parts of)

- Entering a particular email address

- Selecting for users from a particular organisation (by Organisation Name or by attributes of a particular organisation)

- Selecting for users with particular role types, role descriptions or role email addresses

The search results page contains a summary list of all users that match the search criteria, ordered by **Username**.

The results page shows how many matching records were found, and provides navigation options where the results don't fit on a single page.

The results can be reordered by clicking on a column heading, and ordered in reverse by clicking on the same heading a second time.

10.2   Viewing and Editing User Details

Details of a user can be displayed by clicking on a user name in the search results page. The following page will appear, although Organisation Authorities and Application Administrators do not see all of the attributes displayed here.

Scrolling down displays:

and then:

The eBusiness Administrator can see all attributes except the user's Password, and can edit all attributes, including the Password (to reset it), but excluding the Username, UUID and User Type.

Clicking on an Organisational Role link allows details of a current organisation role to be displayed and edited or deleted.

The **Add New Role** button allows the recording of a new organisational role.

The page shows all applications the user can access. The eBusiness Administrator and Application Administrator can revoke this access from here.

10.3   Validating Changes to User Details

Where users change identity or role details such as their name or their organisational role, their Organisation Authority is notified that these changes require validation.

Organisation Authorities can view and validate or reject requests by accessing the EUS Administrative application and then selecting **Request Management**.

The request types are:

- New Organisation Role: an existing user has recorded a new organisational role.

- Modify Organisation Role: an existing user has modified their organisational role for the existing organisation.

- Change Name: an existing user has modified their name.

In each case, details of the request can be displayed by selecting the **Request ID**. Because the requests are different, the information displayed also differs.

For New Organisational Roles the details page is:

For a changed Organisational Role request, the details are:

For a changed name request, the details are:

11. Request Tracking

This facility is intended for use by the eBusiness Administrator, Application Administrators and Organisation Authorities to find, view and action user requests.

The Request Tracking facility is accessed via the EUS Administrative application and the **Request Tracking** menu.

Selecting **Request Tracking** displays the following page:

Track Requests search page allows users to locate requests by selecting one or more criteria. Although the system will search for unspecific selection criteria, there are thousands of requests in the directory, and large searches may time out prior to returning a result.

The options for searching include:

- Selecting for request of a particular application

- Selecting by entering a username (or part of a username)

- Selecting by Given Name or Family Name (or parts of)

- Entering a particular email address

- Selecting for users from a particular organisation

- Selecting for users with particular role types, role descriptions or role email addresses

- Selection of requests raised between particular date ranges, by default 7 days range from current date.

- Selection of requests of users based on the request status category

The search results page contains a summary list of all requests that match the search criteria, ordered by **Request Date**.

The search results list is based on the role of the user logged into the EUS:

- Organisation Authorities will see all requests for their organisations, and validate or reject pending requests.

Organisation Authorities can action pending requests by selecting **Request Id** when the value is in Bold text.