



Process Requests (TO-1141)

 [TO-821] Eligibility - SFTP Workflow Created: 21/Feb/24 Updated: 23/Apr/24 Resolved: 14/Mar/24

Status:	TICKET RESOLVED
Project:	Technology Operations Board
Components:	None
Fix versions:	None
Parent:	Process Requests

Type:	Task	Priority:	Medium
Reporter:	Annie Tran	Assignee:	Solounge Bowen
Resolution:	Done	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Attachments:	 SFTP Credentials Example 1.pdf  SFTP Credentials Example 2.pdf
Vendor / Issue Type:	Process Improvement
Key Performance Indicator:	Improved User Experience
KPI Measure:	Automates the Enterprise Client SFTP Onboarding workflow with Tech support. Which allows visibility to all documentation across departments

Description

Background:

- During the recent discussion, it was identified that there are two scenarios for onboarding clients with file feeds – one involving an external vendor and the other requiring manual upload via the client's HR team.
 - External Vendor (Example 1) (Tech Support):**
 - Client Information:** [Provide client details]
 - Procedure:** The client uses an external vendor for their file feed.
 - Request:** The client is requested to share a public SSH key, and manual upload instructions are to be omitted.
 - Next Steps:**
 - [Specify any specific steps or information needed]
 - Manual Upload via HR Team (Example 2) (Dev Ops):**
 - Client Information:** [Provide client details]
 - Procedure:** The client will be supplying the file feed manually via their HR team.
 - Request:** A key pair is manually created for the client, and the private SSH key is shared. Filezilla instructions prepared by Vuka are also shared.
 - Next Steps:**
 - [Specify any specific steps or information needed]

Next Steps:

- [Define specific steps for the Eligibility Team to take based on the client scenario]
- [Specify any additional information or collaboration needed from other teams]
- [Assign tasks to team members involved in the onboarding process]

Follow Up:

- <https://kindbody.slack.com/archives/C06NS1FSDN3/p1710272446550389>
 - Provided link to Enterprise team → <https://kindbody.atlassian.net/servicedesk/customer/portal/21/group/63/create/347>

References:

- Attachments
- **KPI Measures:** - To ensure a smooth onboarding process, the following key performance indicators (KPIs) will be monitored:

1. Timely Receipt of SSH Key:

- Measure: Duration from ticket creation to receipt of SSH key from the client.
- Target: [Specify the target duration]

2. Accuracy of Key Pair Generation:

- Measure: Accuracy in generating and sharing the key pair.
- Target: [Specify the desired accuracy]

3. Client Training Completion:

- Measure: Percentage of clients completing Filezilla instructions or other training items.
- Target: [Specify the target completion rate]

Comments

Comment by [Jasmine Sekhon](#) [12/Mar/24]

Per Meeting with [Annie Tran](#) & [Vukasin Nikodijevic \(C\)](#) :

Two Processes:

1. New Client Request - SFTP Setup (turnaround time: few hours)
 1. Annie's Team: creates New Client Request - SFTP Setup
 1. Indicate that username and key are needed, PGP needed
 2. IT team creates username, key, and provides PGP public key to customer
 3. IT team emails credentials to the Client IT Contact
2. An update needed to be made to the existing SFTP

Comment by [Jasmine Sekhon](#) [12/Mar/24]

[Vukasin Nikodijevic \(C\)](#) [Mehran Mosbriantanha](#) can you please confirm the following workflows below for SFTP escalations:

Process 1: New Client Request - SFTP Setup

1. Annie's Team Responsibilities:

- Create a New Client Request - SFTP Setup.
 - [Solounge Bowen](#) will work on a form for the team to submit this request
- Specify that a username and key are required, and PGP is needed for security.
- Initiate the request with the necessary details.
 - Include Client's IT Contact

2. Tech Support Responsibilities:

- Generate a username and key.
- Provide the PGP public key to the customer.
- Email the credentials to the Client's IT Contact.

Ticket Routing:

- Initial ticket creation by Annie's Team: automatically routed to Tech Support for username, key, and PGP generation.
- Tech Support emails the credentials to the Client's IT Contact

Process 2: Update to Existing SFTP

1. Annie's Team Responsibilities:

- Create a ticket to update the existing SFTP
 - [Solounge Bowen](#) will work on a form for the team to submit this request
- Provide: Username, key, PGP, and Client's IT Contact

2. DevOps Responsibilities:

- Make appropriate updates to SFTP
- Email updates to the Client's IT Contact.

Ticket Routing:

- Initial ticket creation by Annie's Team: automatically routed to DevOps for updates
- DevOps emails update to Client's IT Contact

Comment by [Jasmine Sekhon](#) [13/Mar/24]

Confirmed with [Mehran Mosbriantanha](#) on the following:

- Process 1: Route to Tech Support
- Process 2: Route to [Zach Ladson](#)

Comment by [Solounge Bowen](#) [14/Mar/24]

Created CLient SFTP Form & can be found here → <https://kindbody.atlassian.net/servicedesk/customer/portal/21/group/63/create/347>

Comment by [Vukasin Nikodijevic \(C\)](#) [15/Mar/24]

[Jasmine Sekhon](#) process which you've described is correct.