

**Salesforce.com End User Roles/Profiles Functional Design Document**

Version 1.2

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**Revision History**

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Author | Summary of Changes |
| 1.0 | 2/5/2014 | Mike Schmidt, Sreelatha SK, John Kelly | Initial draft |
| 1.1 | 1/19/2015 | Sreelatha SK, Mike Schmidt | With the Profile changes and Account based Sharing Rules requirements |
| 1.2 | 5/29/2015 | Sreelatha SK | Updated Integration users in section-4 |
|  |  |  |  |

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# Overview

This document defines the functionality needed to successfully implement user profiles for the Philly311 CRM solution on SalesForce.

*Note: Part of this document is formatted in landscape mode due to the width of one or more tables.*

# Unisys Responsibilities

* Gather the user profile and user roles requirements and design the user profiles and user roles.
* Configure the SFDC Service Cloud platform and Community Portal per the approved Business Configuration Design Document including:
  + Users, User Profiles, & User Roles based on the user role table in SOW Appendix E – User Role
* Assign the user profile and role to City user IDs.
* Assign user roles and profiles to end users.

# User Profiles Configuration Settings

Unisys configures the Profiles for Apps and System settings. The Apps settings apply for SalesForce apps while the System settings apply across all the apps.

Apps Settings includes:

* Assigned Apps: Settings that specify which apps are visible in the app menu
* Object Settings: Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible
* App Permissions: Permissions to perform app-specific actions, such as "Manage Call Centers"
* Apex Class Access: Permissions to execute Apex classes
* Visualforce Page Access: Permissions to execute Visualforce pages
* Data Category Visibility: Define access to data categories
* System Settings includes:
* System Permissions: Permissions to perform actions that apply across apps, such as "Modify All Data"
* Login Hours: Settings that control when users can log in
* Login IP Ranges: Settings that control the IP addresses from which users can log in

# User Roles

| **Role** | **Functionality** | **Salesforce Product** | **User Counts** | **Key Assumptions** |
| --- | --- | --- | --- | --- |
| Police Department Users | Access the community to view KB articles, add SR's, update SRs, & view reports/dashboards. | Partner Community - Restricted Use (Monthly Logins) | 200 | The Police Users have laptops or other mobile devices that have wifi capabilities with Internet to access the Salesforce.com 311 solution. |
| Knowledge Authors | Access SFDC to update articles, add new articles, archive articles, & route to the KB Manager approval queue. | Knowledge Only | 160 | The Knowledge Authors are City employees and have access to a computer with Internet to access the Salesforce.com 311 Solution. |
| Department WOM (Field Worker) User | Access the community to add/modify/edit SR's and view KB articles. | Partner Community - Restricted User (Members) | 150 |  |
| Neighborhood Liaison | Access the community to view KB articles, add SR's, update SRs, & view reports/dashboards. | Partner Community - Restricted Use (Monthly Logins) | 200 | Neighborhood liaisons will access the Salesforce.com 311 Solution using their own personal devices not associated with the City's . |
| City Council | Access the community to view KB articles, add SR's, update SRs, & view reports/dashboards. | Partner Community - Restricted User (Members) | 100 | City Council will access the Salesforce.com 311 Solution using their own personal devices. |
| State Reps | Access the community to view KB articles, add SR's, update SRs, & view reports/dashboards. | Partner Community - Restricted Use (Monthly Logins) | 20 | State Reps will access the Salesforce.com 311 Solution using their own personal devices. |
| Various Civic City Groups, Kensignton CDC, Northern Liberties CDC | Access the community to view KB articles, add SR's, update SRs, & view reports/dashboards. | Partner Community - Restricted Use (Monthly Logins) | 20 | They will access the Salesforce.com 311 Solution using their own personal devices. |
| City Department Heads | Access the community to view KB articles, add SR's, update SRs, & view reports/dashboards. | Partner Community - Restricted Use (Members) | 65 |  |
| PhillyRising Coordinators | Access SFDC to view KB articles, add SR's, update srs, view reports/dashboards, enter & update marketing campaigns, and enter & update marketing campaign activities. | Service Cloud - Knowledge Pack (Full Use CRM) | \*included in 79 (below) |  |
| Department Liaisons (Supervisors) | Access SFDC to view KB articles, add SR's, update srs, and close SRs, escalate SRs, manage SR assignment, & view reports/dashboards. | Service Cloud - Knowledge Pack (Full Use CRM) | 21 |  |
| 311 Contact Center Agents | Access SFDC to view KB articles, add SR's, update srs, and view reports/dashboards. | Service Cloud - Knowledge Pack (Full Use CRM) | 79 |  |
| 311 Contact Center Supervisor/Manager | Access SFDC to view KB articles, add SR's, update srs, view reports/dashboards, and manage staff. | Service Cloud - Knowledge Pack (Full Use CRM) |  |
| SFDC Administrators | Administrators require access to configuration components. | Service Cloud - Knowledge Pack (Full Use CRM) |  |

~~Revised list as on 1-16-2015~~ Updated ~~31-Mar-2015~~ 29-May-2015



# User License Counts

|  |  |
| --- | --- |
| **SFDC License** | **User Counts** |
| Partner Community - Restricted Use (Monthly Logins) | 440 |
| Partner Community - Restricted User (Members) | 315 |
| Knowledge Only | 160 |
| Service Cloud - Knowledge Pack (Full Use CRM) | 100 |
| **Total** | **1015** |

# User Profiles

| **Profiles** | **Knowledge Base** | | | | | **Service Requests** | | | | **Dashboards/ Reports** | | **Marketing Campaigns/ Marketing Campaign Activities** | | **Staff Management** | **Users (to be filled)** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **View** | **Create** | **Edit** | **Route** | **Archive** | **View** | **Create** | **Edit** | **Manage/ Escalate** | **View** | **Edit** | **View** | **Edit** |
| Police Department Users | Yes |  |  |  |  | Yes |  | Yes |  | Yes |  |  |  |  |  |
| Knowledge Authors | Yes | Yes | Yes | Yes | Yes |  |  |  |  |  |  |  |  |  |  |
| Department WOM (Field Worker) User | Yes |  |  |  |  | Yes | Yes | Yes |  |  |  |  |  |  |  |
| Neighborhood Liaison | Yes |  |  |  |  | Yes | Yes | Yes |  | Yes |  |  |  |  |  |
| City Council | Yes |  |  |  |  | Yes | Yes | Yes |  | Yes |  |  |  |  |  |
| State Reps | Yes |  |  |  |  | Yes | Yes | Yes |  | Yes |  |  |  |  |  |
| Various Civic City Groups, Kensignton CDC, Northern Liberties CDC | Yes |  |  |  |  | Yes | Yes | Yes |  | Yes |  |  |  |  |  |
| City Department Heads | Yes |  |  |  |  | Yes | Yes | Yes |  | Yes |  |  |  |  |  |
| PhillyRising Coordinators | Yes |  |  |  |  | Yes | Yes | Yes |  | Yes |  | Yes | Yes |  |  |
| Department Liaisons (Supervisors) | Yes |  |  |  |  | Yes | Yes | Yes | Yes | Yes |  |  |  |  |  |
| 311 Contact Center Agents | Yes |  |  |  |  | Yes | Yes | Yes |  | Yes |  |  |  |  |  |
| 311 Contact Center Supervisor/Manager | Yes |  |  |  |  | Yes | Yes | Yes |  | Yes |  |  |  | Yes |  |
| SFDC Administrators | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |  |

# User Profile Licenses

| **Profiles** | **SalesForce Product License** |
| --- | --- |
|
| Police Department Users | Partner Community - Restricted Use (Monthly Logins) |
| Knowledge Authors | Knowledge Only |
| Department WOM (Field Worker) User | Partner Community - Restricted User (Members) |
| Neighborhood Liaison | Partner Community - Restricted Use (Monthly Logins) |
| City Council | Partner Community - Restricted User (Members) |
| State Reps | Partner Community - Restricted Use (Monthly Logins) |
| Various Civic City Groups, Kensington CDC, Northern Liberties CDC | Partner Community - Restricted Use (Monthly Logins) |
| City Department Heads | Partner Community - Restricted Use (Members) |
| PhillyRising Coordinators | Service Cloud - Knowledge Pack (Full Use CRM) |
| Department Liaisons (Supervisors) | Service Cloud - Knowledge Pack (Full Use CRM) |
| 311 Contact Center Agents | Service Cloud - Knowledge Pack (Full Use CRM) |
| 311 Contact Center Supervisor/Manager | Service Cloud - Knowledge Pack (Full Use CRM) |
| SFDC Administrators | Service Cloud - Knowledge Pack (Full Use CRM) |