

**Salesforce.com Report Profiles Functional Design Document**

Version 1.0

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**Revision History**

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Author | Summary of Changes |
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| 1.1 |  |  |  |
| 1.2 |  |  |  |
| 1.3 |  |  |  |
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Table of Contents

[Table of Contents 3](#_Toc379463734)

[1 Overview 4](#_Toc379463735)

[2 Implementation 4](#_Toc379463736)

[2.1 Goal 4](#_Toc379463737)

[2.2 Process 4](#_Toc379463738)

[3 Assumptions 4](#_Toc379463739)

[4 Supporting Business Rules 5](#_Toc379463740)

# Overview

This document defines the Report Profiles functional requirements to successfully access the SFDC standard or custom reports for 311 Philly CRM in SalesForce.com. The SFDC reports access includes profile permissions set for different categories of SFDC reports mentioned:

* SalesForce Standard Reports (for getting the Account & Contact Reports, Support Reports, Administrative Reports, Activity Reports, Call Center Reports)
* Knowledge Base Dashboards & Reports
* SalesForce CRM Dashboards
* Chatter Usage Dashboards
* Service & Support Dashboards

# Implementation

## Goal

The business goal being addressed by this document:

1. The ability to set Reports Profiles for accessing the SFDC Reports and Dashboards within 311 Philly CRM in Salesforce.com

## Process

The Report Profiles and their permissions for different User Profiles is listed below:

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

The system permissions for the Report profiles include enabling the below settings:

* Export Reports
* Manage Dashboards
* Manage Public Reports
* Report Builder
* Run Flows
* Run Reports
* Schedule Reports
* View My Team's Dashboards

# Assumptions

The following table defines the assumptions of conditions that must be true for a successful implementation:

| **Assumption #** | **Assumption Description** | **Comments** |
| --- | --- | --- |
| ASSUMP1 | This would be integral with the User Roles and Profiles settings even though Report Profile is documented as separate requirements. |  |

# Supporting Business Rules

The following table defines the business rules that must be true for a successful implementation:

| **Rule #** | **Business Rule Description** | **Comments** |
| --- | --- | --- |
| BRULE001 | The Report Profile user should have the ability to filter reports by department and for department to secure access to departmental reports |  |
| BRULE002 | The Report Profile user should have the ability to allow one or more users to query information and run reports at the same time |  |
| BRULE003 | The Report Profile user should have the ability to provides number of inquiries per division/department |  |
| BRULE004 | The Report Profile user should have the ability to flag reports or certain elements of the report as confidential and set permissions for access to reports |  |
| BRULE005 | The Report Profile user should have dashboard capabilities that will display reporting information based on user's defined role within the CRM system |  |
| BRULE006 | The Report Profile user should have ability to customize dashboard information based on user's desired level of information |  |
| BRULE007 | The Report Profile user should have the ability for reports of generated service requests are available to view by administrators |  |
| BRULE008 | The Report Profile user should have the ability to provide optional anonymous reporting | This has to be provided via PublicStuff |
| BRULE009 | The Report Profile user should be flexible and secure security management process for assigning privileges and rights |  |
| BRULE010 | The Report Profile user should have the capability for control access by level, which will apply to online activities, batch processing, report writer or retrieval software and system utilities, at the following levels: Database |  |