Data Access Demo Card

SMA-X 2017.11

# Background

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| --- | --- |
| Key Messages | * SMA-X allows you to restrict data visibility to specific users (e.g., segment HR from IT data) using Domain Segmentation and/or field encryption. * Domain Segmentation allows data domains to be assigned automatically, reducing overall maintenance. * Using Encryption you reveal specific fields’ content and attachments only to specific users. * SMA-X allows multiple themes, for example to support different business units, creating a customized experience for each. * Domain segmentation for data + multiple themes + catalog entitlement supports additional customers and partners use cases (e.g., multiple LOB or clients managed in the same tenant, with same underlying processes). |
| Customer Challenge | * Restrict access to data across departments or lines of business (LOB) * Restrict access to specific information on the form (for example, SSN) * Personalization of the self-service portal and the agent interface according to the LOB |
| Engage Them | * Are you able to hide confidential data between agents? For example when:   + Incident that includes database password should not be visible to people outside the DBA team   + Only HR team should be able to see & handle absence requests from the employees   + Only HR team should be able to see personal information on the requestor like employee ID, SSN etc. * Do you need to provide unique portal experiences for multiple groups e.g., students vs. faculty? |
| Differentiators | * Optimize cost by sharing system with single process but separate data for multiple LOBs or clients * Easily create personalized portal pages per BU within a single company tenant, reducing administration cost. * Encrypted fields protect private data such as employee IDs and social security number, salary, etc. |

# Quick Flow

The goal of the Quick Flow demo card is to provide a benefit oriented *overview*, to *introduce* the customer to value and solution. It should be completed in ~5-10 minutes; optional sub-flows to demonstrate more of the solution may be included below. Make sure your demo environment is ready – see demo set up below. After practicing and perfecting the flow, you might want to copy and paste the rightmost Cheat Sheet column (below) to serve as a printed or electronic guide during the demo.

Features Demonstrated:

* Portal Themes per LOB
* Portal Themes Administration
* Private Domains
* Field Level Encryption (optional)
* HR Domain (optional)

| **Do** | **Say** | **Cheat Sheet** |
| --- | --- | --- |
| **Portal Themes per LOB**   * Login to ESS as Allan.Gobicc and see the theme for Cool Cakes * Login to ESS as Julia.Darwinrf and see the theme for Rain Forest Blends | * Some of you might remember Cool Cakes.  After doing a very successful exit with Fine Foods Cool Cakes have been looking for new ways to expand. Their successful selling of cakes and coffee lead them to grow in their coffee business. * They decide on creating a new business unit and brand called “Rain Forest Blends” for their coffee business and now they want Rain Forest Blends employees to have their own dedicated portal and look & feel. * SMA-X gives you the flexibility of having different themes to different business units or departments. The theme will be chosen according to the group and location of the user (entitlement rule). | * Portal theme in ESS as Allan.Gobicc * Portal theme in ESS as Julia.Darwinrf |
| **Portal Themes Administration**   * Login as [Jennifer.falconmf](mailto:Jennifer.falconhpe@gmail.com) and go to Self Service portal settings > Theme Settings * Show there are two themes: cool cakes and rain forest blends. Each with different logo. * Switch to the audience tab to show they are targeted to different entitlement rule – in this case based on the cool cakes and rain forest groups. | * They created a new theme with Rain Forest Blends logo and name * You can see that each theme has different audience and this is why when I’m logged-in as Allan.Gobicc that belongs to cool cakes I see cool cakes theme, and when logged in as Julia.Darwinrf, I see rain forest blends theme. * SMA-X allows very easily to create personalized portal per BU within a single company tenant, reducing administration cost. Obviously the content itself (article and catalog) can also be personalized so only the relevant content will be shown to the user | * As Jennifer, Self Service Portal settings > Theme Settings * two themes * audience for themes |
| **Private Domains** | * Rain Forest Blends are using SMA-X. Their DBA team are handling a lot of requests and some of their requests contain very sensitive information like DB password. They came across a situation that they want to update the request they are handling with this sensitive information but they don’t want people outside their team (like service desk agents) to be able to see this information. * SMA-X provides the ability to divide your data to domains and control the visibility of the domains for your agents |  |
| **Log a Private Domain ticket**   * Login in as Jennifer.falconmf * Service Request Management->live support   + Name: Allan Gobicc   + Title: “DB is out of space”   + Description: “DB ORA\_HR is out of space. probably need to delete some old archive files”   + Service Desk Group: “DBA Team” | * The Service Desk is getting a call from Allan Gobicc, one of the users about a problem in the production DB. * She goes to the live support, logs the request and assigns it to the DBA team. | * SRM > Live support * Log new call from Allan Gobicc * Assign to Service Desk group: DBA team |
| * Login with Jane.klintdba, view the ticket in the service request management queue * Login with John.Grynberghr and go to Service Request Management and you won’t see the new DBA request in the dashboard. | * Jane Klintdba, who is part of the DBA team can see the new request that was created. * John Grynberghr who has no permission to view database cannot see the new request * SMA-X can easily segment your data according to domain and making those authorizations very easy to setup and maintain through automated domain assignment, yet very flexible through specific business rules or Ui to select manually specific domains. | * SRM as Jane can see the DBA request * SRM as John won’t see the DBA request |
| ***Optional: Private Domain Administration***  ***Data Domains List***   * Administration-> lists * Data Domains list * see: “Database” domain in the list | * Lets’ take a look in our Data Domains list. You can see the “public domain” that exists by default in all tenants and we also have “Database” domain. | * Administration-> lists * Data Domains list * see: “Database” domain in the list |
| ***Optional: Role access to Data Domain***   * People -> roles * DBA role * Domain Segmentation: show that database domain is chosen | * Now let’s make this domain visible to the DBA team. * The visibility of the domain can be defined in the role level. This will allow me maximum flexibility. So in this case we search for the DBA role and validate that the new domain is written there. | * People -> roles * DBA role * Domain Segmentation: show that database domain is chosen |
| ***Optional: Set primary domain for DBA Team assigned tickets***   * People -> groups * DBA team * Show Primary domain field is “Database” * save | * To save time and manual work we also want that any entity that is being created and assigned to the DBA team will automatically have the database domain. * SMA-X supports and encourages you to use automatic assignment which can be defined in the group level and in the person level. * In our case let’s see the definition in the group level | * People -> groups * DBA team * Show Primary domain field is “Database” * save |

# Optional Sub Flows – Field Level Encryption

Customer intrigued after seeing this overview? A good sub-flows/drill-down would be to show field level encryption.

| **Do** | **Say** |
| --- | --- |
| * If running the main flow it can be done together if not the following steps need to be repeated:   **Log a Private Domain ticket with encrypted Employee ID field**   * Login as Jennifer.falconmf * Service Request Management->live support * Name: Allan Gobicc * Title: “DB is out of space” * Description: “DB ORA\_HR is out of space. probably need to delete some old archive files” * Click on Employee ID field * Enter passcode: Password\_123 * Employee id: 1234567 * Service Desk Group: “DBA Team” | * XXX (your user) is getting a call from one of the users about a problem in the production DB. * She goes to the live support, log in the request and assigned it to the DBA team directly * XXX(your user) who is part of the Administrative group or HR can see the value using his/her passcode. |
| * Login as Jane.Klintdba | * Jane.Klintdba who is a DBA can see the Database Domain request but cannot see the contents of the employee ID field since this field is encrypted. |
| **Demonstrate Human Resources domain**   * Login as amy.lopezmf and create a request to Check Leave Eligibility * Login as agent, Kimberly.quanmf and she will not be able to see this request. * Login as john.grynberghr and he will be able to see the request. * As John, add a solution and completion code and Save the “Check Leave Eligibility” request. It will be automatically closed. | * The Check Leave Eligibility offering is configured to be assigned by default to the Human Resources group. * A request assigned to the Human Resources group will be accessible only to the Human Resources domain, John Grynberghr user. |

# Demo Preparation

Demo data prep includes initial set-up tasks and items that must be checked before each demo (e.g., demo data changes over time, or to return to the pre-demo state). Be mindful of whether the changes are appropriate or needed for the demo tenant you’re using – e.g., for the shared demos, initial set-up is probably already done, and some changes shouldn’t be applied (e.g., theme)

## Initial Set-up

* Adding Fields to forms (not all customers require the overhead of segmentation, so “Primary domain” field needs to be enabled) (Admin/Records/Forms):
  + Entity Group- add primary domain to full form and preview form (General Section or Organizational Section)
  + Entity Person- add primary domain to full form and preview form and new form (Organizational Information Section)
* Create domains
  + Add Database to the list “Data Domains”
  + Add Human Resources to the list of “Data Domains”
* Create Roles (Admin/People):
  + DBA Role
    - General – log in to the app, create public reports, public favorite view
    - Assign Database domain to the role
  + Human Resources Role
    - General – login to the app, create public reports, public favorite view
    - Assign Human Resources domain to the role
* Create users in SaaS portal or give access to the new tenant in the SaaS portal, sync users in SMA-X and give them the IT user role
  + Jane.Klintdba with password: Password\_123
  + Allan.Gobicc with password: Password\_123
  + Julia.Dawrinrf with password: Password\_123
  + John.Grynberghr with password: Password\_123
* Create Groups (Admin/People/Groups/New):
  + DBA Team
    - Name: DBA Team
    - Group is functional
    - Roles: DBA
    - Primary Domain: Database
    - Members: Jane Klintdba
  + Cool Cakes
    - Name: Cool Cakes
    - Members: Allan Gobicc
    - Group is Organizational
  + Rain Forest Blends
    - Name: Rain Forest Blends
    - Members: Julia Darwinrf
    - Group is Organizational
* Modify the “Human Resources” Group
  + - Roles: Human Resources
    - Primary Domain: Human Resources
    - Members: John Grynberghr
* Modify user John Gyrnberghr to have the Human Resources role
* Create entitlements (Admin/Entitlement rules):
  + Cool Cakes – group should be cool cakes
  + Rain Forest Blends – group should be Rain Forest Blends
* Themes: (Admin/Self-Service Portal Settings/theme settings)
  + Cool Cakes theme
    - Name: Cool Cakes
    - Change background picture to: something
    - Change logos to: something
      * Page title #b6015b
      * Section title #d13979
      * Link #066f9c
      * Link Mouseover #055578
    - Audience: Cool Cake Group
    - Enable the theme
  + Rain Forest theme
    - Name: Rain Forest Blends
    - Change background picture to: something
    - Change logos to: something
      * Page Title #4c2d09
      * Section title #7c5c37
      * Link #53310f
      * Link mouseover #3b250c
      * Ribbon text #ffffff
    - Audience: Rain Forest Blends Group
    - Enable the theme

Set-up for encryption demo

* Administration-> People -> Encryption Domains
  + New
    - \*\*\* first time user in encryption domain will be prompted to create his own passcode
  + Name: Private Details
  + Owner: you
  + Groups: Administrative Services and Human Resources Group
  + Save
  + Create verification codes for all users and then use them within 24 hours to verify.
* Administration-> Records-> Request
  + Fields
    - Create new field
    - Name: Employee ID
    - MEDIUM\_TEXT
    - Encrypted
    - Encryption Domain: Private Details
    - Save
  + Forms
    - Forms : withoutResolution and LiveSupportNewRequest and LiveSupportEditRequest
    - Add the new field after “Requested by” field