# Saviynt Deployment Document

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| Jira Story Number | IFEIAMPS-3605 |
| Jira Story Name | Onboarding Metrics Dashboard |
| Deployment Document Author | KPMG |
| Document Creation Date | 8/18/2023 |

For each step provided, please mark whether the step is for QA deployment, Prod Deployment, or both.

# Section 1 – Pre-Implementation Steps

Complete these steps prior to the deployment window to prepare for changes.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Step | QA Deploy | Prod Deploy | Step Instruction | Duration |
| Pre-requisites | | | | |
| 1 | ✓ | ✓ | Administrator account with password from Saviynt that has the ROLE\_ADMIN SAV Role access. |  |

# Section 2 – Deployment Steps

*This is the list of production changes to complete during the deployment window.*

*IMPORTANT! If the production changes require a restart, please add instructions to indicate at which point a restart should occur. If the production change requires suspension of processing rules, please indicate steps to disable and enable the rules as part of this section.*

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Step | QA Deploy | | Prod Deploy | | Step Instruction | | Duration |
| **New hires and Rehires Dashboard** | | | | | | | |
| 1. Steps to export the Report for New hires and Rehires and update endpoint names | | | | | | | |
| 1.0 | ✓ | | ✓ | | Login to SSM with administrator user credential. | |  |
| 1.1 | ✓ | | ✓ | | Click on **Admin** on the top right corner and then on **Export Package** under **Transport**. | |  |
| 1.2 | ✓ | | ✓ | | On the next page, type “**Analytics V2**” against objects to export as shown below | |  |
| 1.3 | ✓ | | ✓ | | Select the name of the Reports to be exported as a package and click on **Add**.   |  |  | | --- | --- | | Report Name | New Hires and Rehires Report | | |  |
| 1.4 | ✓ | | ✓ | | Next, click on **View Summary** on the bottom right. | |  |
| 1.5 | ✓ | | ✓ | | Finally, validate the Report you want to export and then click on **Export**. | |  |
| 1.6 | ✓ | | ✓ | | 1. Click on **Download**      1. Once the zip file is downloaded 2. Rename the file to “**NewHires\_Rehires\_Metrics\_Dashboard\_Report.zip”** 3. Unzip the file. | |  |
| 1.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present <File Names may vary from the screenshot>. Screenshot below: | |  |
| 1.8 | ✓ | | ✓ | | Open the JSON file with name like **‘AnalyticsV2\_%’** in any editor (Notepad,Notepad++). | |  |
| 1.9 | ✓ | | ✓ | | Modify the “**ANALYTICSQRY**” key with valid End Point Names which is specific to environment  **NOTE:** Please refer to the End Point Names table below for the values.   |  |  |  | | --- | --- | --- | | EndPoint Name in Query | Endpoint Name in QA | Endpoint Name in Prod | | esi::psscript::homedrive::test | esi::psscript::homedrive::test | esi::psscript::homedrive::prod | | esi::psscript::exchange::test | esi::psscript::exchange::test | esi::psscript::exchange::prod | | core::psscript::homedrive::test | core::psscript::homedrive::test | core::psscript::homedrive::prod | | core::exchange::cigna::dev | core::psscript::exchange::test | core::psscript::exchange::prod | | core::ad::rootsil::test | core::ad::rootsil::test | core::ad::internal::prod | | esi::ad::preaccounts\_preprod\_sand::test | esi::ad::preaccounts\_preprod\_sand::test | esi::ad::accounts::prod | | cigna::ad::globalcore\_did::dev | cigna::ad::globalcore\_did | cigna::ad::globalcore::gid, cigna::ad::globalcore\_did | | |  |
| 1.10 | ✓ | | ✓ | | Please search for “**INTERVAL 330 DAY**” replace it with “**INTERVAL 365 DAY**”. | |  |
| 1.11 | ✓ | | ✓ | | Save the JSON file | |  |
| 1.12 | ✓ | | ✓ | | Zip the folder with the latest JSON file. | |  |
| 1. Steps to import Reports.zip for **New Hires and Rehires Report** | | | | | | | |
| 1.13 | ✓ | | ✓ | | Copy the latest “**NewHires\_Rehires\_Metrics\_Dashboard\_Report.zip**” from last step to the local machine from where QA/PROD Saviynt is accessible. | |  |
| 1.14 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 1.15 | ✓ | | ✓ | | Click on **Admin** tab from the top right corner menu. | |  |
| 1.16 | ✓ | | ✓ | | Expand **Transport** and click on **Import Package** Click on **Browse** next to “Choose package to import” and Navigate to release package folder. | |  |
| 1.17 | ✓ | | ✓ | | Click on **Browse** next to “Choose package to import” and Navigate to release package folder. | |  |
| 1.18 | ✓ | | ✓ | | * Select **NewHires\_Rehires\_Metrics\_Dashboard\_Report.zip**( The zip created in the previous step). * Click on open. * Provide the Business Justification. | |  |
| 1.19 | ✓ | | ✓ | | Click on **View Summary**. | |  |
| 1.20 | ✓ | | ✓ | | On the next page, click on **Request**. | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 1.21 | | ✓ | | ✓ | | Go to **Admin** 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select **Dashboard Configuration** |  |
| 1.22 | | ✓ | | ✓ | | To create new Dashboard, Click on **Action** button 🡪 Select **Create Dashboard**. |  |
| 1.23 | | ✓ | | ✓ | | On *Create New Dashboard* page, Give the below details:  **NOTE:**Below Highlighted Placeholders should be replaced with actual values from the environment.   * For Dashboard query, <ANALYTICSKEY> key value is taken from the Data Analyzer using the query :   *SELECT ANALYTICSKEY from analyticsconfiges where ANALYTICSNAME='New Hires and Rehires Report'*   |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | New Hires and Rehires | | 2 | Dashboard Type | ES PieChart | | 3 | Dashboard query | {  "analyticsConfig": " <ANALYTICSKEY> ",  "fieldToGroup": "USERTYPE",  "filterMap": { "USERTYPE":["New User","Rehire"]  }} | | 4 | Chart Properties | Mention {} in this field whenever you update the dashboard configuration. | | 5 | Status | Active | | 6 | Local Query | {  "analyticsConfig": "<ANALYTICSKEY> ",  "fieldToGroup": "USERTYPE",  "filterMap": {  "TIMEFRAME": ["${TIMEFRAME}"]  }  } | | 7 | Local Filter Query | {  "parameters": [{  "paramName": "TIMEFRAME",  "parentParam": "",  "label": "TIMEFRAME",  "type": "dropdown",  "dataType": "query",  "value": "select 'LAST 7 Days' as 'key', 'LAST 7 Days' as 'displayvalue' from dual union select 'LAST 1 Month' as 'key', 'LAST 1 Month' as 'displayvalue' from dual union select 'LAST 3 Months' as 'key', 'LAST 3 Months' as 'displayvalue' from dual union select 'LAST 1 Year' as 'key', 'LAST 1 Year' as 'displayvalue' from dual"  }]  } | |  |
| 1.24 | | ✓ | | ✓ | | Click on **Create**. |  |
| 1.25 | | ✓ | | ✓ | | 1. Go back to Home page. 2. Goto Admin. 3. Click on Menu(three lines) option on top left corner. 4. Select **Sav Roles**. 5. Select **Role Admin** from the role list. 6. Navigate to **Dashboard** tab. 7. Scroll down and check for **Identity Repository - Admin**. 8. Click on **Add Dashboard**, Popup will appear. 9. On Search bar, Search for Dashboard Name “**New Hires and Rehires”**.   Click on **ADD** and close the tab. |  |
| **AD Birthright Provisioning** | | | | | | | |
| 1. Steps to export the Report for **AD Birthright Provisioning** and update endpoint names | | | | | | | |
| 2.0 | ✓ | | ✓ | | Login to SSM with administrator user credential. | |  |
| 2.1 | ✓ | | ✓ | | Click on **Admin** on the top right corner and then on **Export Package** under **Transport**. | |  |
| 2.2 | ✓ | | ✓ | | On the next page, type “**Analytics V2**” against objects to export as shown below | |  |
| 2.3 | ✓ | | ✓ | | Select the name of the Reports to be exported as a package and click on **Add**.   |  |  | | --- | --- | | Report Name | AD Birthright Provisioning Report | | |  |
| 2.4 | ✓ | | ✓ | | Next, click on **View Summary** on the bottom right. | |  |
| 2.5 | ✓ | | ✓ | | Finally, validate the Report you want to export and then click on **Export**. | |  |
| 2.6 | ✓ | | ✓ | | 1. Click on **Download**      1. Once the zip file is downloaded 2. Rename the file to “**AD\_Birthright\_Provisioning\_Report.zip”** | |  |
| 2.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present <File Names may vary from the screenshot>. Screenshot below:    This step is just to verify if the files are present. | |  |
| 2.8 | ✓ | | ✓ | | Open the JSON file with name like **‘AnalyticsV2\_%’** in any editor (Notepad,Notepad++). | |  |
| 2.9 | ✓ | | ✓ | | Modify the “**ANALYTICSQRY**” key with valid End Point Names which is specific to environment  **NOTE:** Please refer to the End Point Names table below for the values.   |  |  |  | | --- | --- | --- | | EndPoint Name in Query | Endpoint Name in QA | Endpoint Name in Prod | | esi::psscript::homedrive::test | esi::psscript::homedrive::test | esi::psscript::homedrive::prod | | esi::psscript::exchange::test | esi::psscript::exchange::test | esi::psscript::exchange::prod | | core::psscript::homedrive::test | core::psscript::homedrive::test | core::psscript::homedrive::prod | | core::exchange::cigna::dev | core::psscript::exchange::test | core::psscript::exchange::prod | | core::ad::rootsil::test | core::ad::rootsil::test | core::ad::internal::prod | | esi::ad::preaccounts\_preprod\_sand::test | esi::ad::preaccounts\_preprod\_sand::test | esi::ad::accounts::prod | | cigna::ad::globalcore\_did::dev | cigna::ad::globalcore\_did | cigna::ad::globalcore::gid, cigna::ad::globalcore\_did | | |  |
| 2.10 | ✓ | | ✓ | | Please search for “**INTERVAL 330 DAY**” replace it with “**INTERVAL 365 DAY**”. | |  |
| 2.11 | ✓ | | ✓ | | Save the JSON file | |  |
| 2.12 | ✓ | | ✓ | | Zip the folder with the latest JSON file. | |  |
| 1. Steps to import Reports.zip for **AD Birthright Provisioning Report** | | | | | | | |
| 2.13 | ✓ | | ✓ | | Copy the latest “**AD\_Birthright\_Provisioning\_Report.zip**” from last step to the local machine from where QA/PROD Saviynt is accessible. | |  |
| 2.14 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 2.15 | ✓ | | ✓ | | Click on **Admin** tab from the top right corner menu. | |  |
| 2.16 | ✓ | | ✓ | | Expand **Transport** and click on **Import Package**. | |  |
| 2.17 | ✓ | | ✓ | | Click on **Browse** next to **Choose package to import** and Navigate to release package folder. | |  |
| 2.18 | ✓ | | ✓ | | * Select “**AD\_Birthright\_Provisioning\_Report.zip**”( The zip created in the previous step). * Click on **Open**. * Provide the Business Justification. | |  |
| 2.19 | ✓ | | ✓ | | Click on **View Summary**. | |  |
| 2.20 | ✓ | | ✓ | | On the next page, click on **Request**. | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 2.21 | | ✓ | | ✓ | | Go to Admin 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select **Dashboard Configuration** |  |
| 2.22 | | ✓ | | ✓ | | To create new Dashboard, Click on **Action** button 🡪 Select **Create Dashboard**. |  |
| 2.23 | | ✓ | | ✓ | | On *Create New Dashboard* page, Give the below details:  **NOTE:**Below Highlighted Placeholders should be replaced with actual values from the environment.   * For Dashboard query, <ANALYTICSKEY> key value is taken from the Data Analyzer using the query :   *SELECT ANALYTICSKEY from analyticsconfiges where ANALYTICSNAME=* ‘*AD Birthright Provisioning Report ‘*     |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | BirthrightActive Directory Account Provisioning Status | | 2 | Dashboard Type | ES PieChart | | 3 | Dashboard query | {  "analyticsConfig": "<ANALYTICSKEY> ",  "fieldToGroup": "ProvisioningStatus",  "filterMap": {  "ProvisioningStatus":["AD Provisioning Success","AD Provisioning Failure"]  }  } | | 4 | Chart Properties | Mention {} in this field whenever you update the dashboard configuration. | | 5 | Status | Active | | 6 | Local Query | {  "analyticsConfig": "<ANALYTICSKEY> ",  "fieldToGroup": "ProvisioningStatus",  "filterMap": {  "TIMEFRAME": ["${TIMEFRAME}"]  }  } | | 7 | Local Filter Query | {  "parameters": [{  "paramName": "TIMEFRAME",  "parentParam": "",  "label": "TIMEFRAME",  "type": "dropdown",  "dataType": "query",  "value": "select 'LAST 7 Days' as 'key', 'LAST 7 Days' as 'displayvalue' from dual union select 'LAST 1 Month' as 'key', 'LAST 1 Month' as 'displayvalue' from dual union select 'LAST 3 Months' as 'key', 'LAST 3 Months' as 'displayvalue' from dual union select 'LAST 1 Year' as 'key', 'LAST 1 Year' as 'displayvalue' from dual"  }]  } | |  |
| 2.24 | | ✓ | | ✓ | | Click on **Create**. |  |
| 2.25 | | ✓ | | ✓ | | 1. Go back to Home page. 2. Goto Admin. 3. Click on Menu(three lines) option on top left corner. 4. Select **Sav Roles**. 5. Select **Role Admin** from the role list. 6. Navigate to **Dashboard** tab. 7. Scroll down and check for **Identity Repository - Admin**. 8. Click on **Add Dashboard**, Popup will appear. 9. On Search bar, Search for Dashboard Name “**Birthright Active Directory Account Provisioning Status”**. 10. Click on **ADD** and close the tab. |  |
| **Exchange Birthright Provisioning** | | | | | | | |
| 1. Steps to export the Report for **Exchange Birthright Provisioning** and update endpoint names | | | | | | | |
| 3.0 |  | |  | | Login to SSM with administrator user credential. | |  |
| 3.1 | ✓ | | ✓ | | Click on **Admin** on the top right corner and then on **Export Package** under **Transport**. | |  |
| 3.2 | ✓ | | ✓ | | On the next page, type “**Analytics V2**” against objects to export as shown below | |  |
| 3.3 | ✓ | | ✓ | | Select the name of the Reports to be exported as a package and click on **Add**.   |  |  | | --- | --- | | Report Name | Exchange Birthright Provisioning Report | | |  |
| 3.4 | ✓ | | ✓ | | Next, click on **View Summary** on the bottom right. | |  |
| 3.5 | ✓ | | ✓ | | Finally, validate the Report you want to export and then click on **Export**. | |  |
| 3.6 | ✓ | | ✓ | | 1. Click on **Download**      1. Once the zip file is downloaded 2. Rename the file to “**Exchange\_Birthright\_Provisioning\_Report.zip”** 3. Unzip the file. | |  |
| 3.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present <File Names may vary from the screenshot>. Screenshot below:    This step is just to verify the files are present. | |  |
| 3.8 | ✓ | | ✓ | | Open the JSON file with name like **‘AnalyticsV2\_%’** in any editor (Notepad,Notepad++). | |  |
| 3.9 | ✓ | | ✓ | | Modify the “**ANALYTICSQRY**” key with valid End Point Names which is specific to environment  **NOTE:** Please refer to the End Point Names table below for the values.   |  |  |  | | --- | --- | --- | | EndPoint Name in Query | Endpoint Name in QA | Endpoint Name in Prod | | esi::psscript::homedrive::test | esi::psscript::homedrive::test | esi::psscript::homedrive::prod | | esi::psscript::exchange::test | esi::psscript::exchange::test | esi::psscript::exchange::prod | | core::psscript::homedrive::test | core::psscript::homedrive::test | core::psscript::homedrive::prod | | core::exchange::cigna::dev | core::psscript::exchange::test | core::psscript::exchange::prod | | core::ad::rootsil::test | core::ad::rootsil::test | core::ad::internal::prod | | esi::ad::preaccounts\_preprod\_sand::test | esi::ad::preaccounts\_preprod\_sand::test | esi::ad::accounts::prod | | cigna::ad::globalcore\_did::dev | cigna::ad::globalcore\_did | cigna::ad::globalcore::gid, cigna::ad::globalcore\_did | | |  |
| 3.10 | ✓ | | ✓ | | Please search for “**INTERVAL 330 DAY**” replace it with “**INTERVAL 365 DAY**”. | |  |
| 3.11 | ✓ | | ✓ | | Save the JSON file | |  |
| 3.12 | ✓ | | ✓ | | Zip the folder with the latest JSON file. | |  |
| 1. Steps to import Reports.zip for **Exchange Birthright Provisioning Report** | | | | | | | |
| 3.13 | ✓ | | ✓ | | Copy the latest “**Exchange\_Birthright\_Provisioning\_Report.zip**” from last step to the local machine from where QA/PROD Saviynt is accessible. | |  |
| 3.14 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 3.15 | ✓ | | ✓ | | Click on **Admin** tab from the top right corner menu. | |  |
| 3.16 | ✓ | | ✓ | | Expand **Transport** and click on **Import Package**. | |  |
| 3.17 | ✓ | | ✓ | | Click on **Browse** next to “**Choose package to import**” and navigate to release package folder. | |  |
| 3.18 | ✓ | | ✓ | | * Select **Exchange\_Birthright\_Provisioning\_Report.zip** ( The zip created in the previous step). * Click on open. * Provide the Business Justification. | |  |
| 3.19 | ✓ | | ✓ | | Click on **View Summary**. | |  |
| 3.20 | ✓ | | ✓ | | On the next page, click on **Request**. | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 3.21 | | ✓ | | ✓ | | Go to **Admin** 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select **Dashboard Configuration** |  |
| 3.22 | | ✓ | | ✓ | | To create new Dashboard, Click on “Action” button 🡪 Select **Create Dashboard**. |  |
| 3.23 | | ✓ | | ✓ | | On *Create New Dashboard* page, Give the below details:  **NOTE:**Below Highlighted Placeholders should be replaced with actual values from the environment.   * For Dashboard query, <ANALYTICSKEY> key value is taken from the Data Analyzer using the query :   *SELECT ANALYTICSKEY from analyticsconfiges where ANALYTICSNAME='Exchange Birthright Provisioning Report’*   |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | Birthright Exchange Account Provisioning Status | | 2 | Dashboard Type | ES PieChart | | 3 | Dashboard query | {  "analyticsConfig": "<ANALYTICSKEY>",  "fieldToGroup": "ProvisioningStatus",  "filterMap": {  "ProvisioningStatus":["Exchange Provisioning Success","Exchange Provisioning Failure"]  }  } | | 4 | Chart Properties | Mention {} in this field whenever you update the dashboard configuration. | | 5 | Status | Active | | 6 | Local Query | {  "analyticsConfig": "<ANALYTICSKEY>",  "fieldToGroup": "ProvisioningStatus",  "filterMap": {  "TIMEFRAME": ["${TIMEFRAME}"]  }  } | | 7 | Local Filter Query | {  "parameters": [{  "paramName": "TIMEFRAME",  "parentParam": "",  "label": "TIMEFRAME",  "type": "dropdown",  "dataType": "query",  "value": "select 'LAST 7 Days' as 'key', 'LAST 7 Days' as 'displayvalue' from dual union select 'LAST 1 Month' as 'key', 'LAST 1 Month' as 'displayvalue' from dual union select 'LAST 3 Months' as 'key', 'LAST 3 Months' as 'displayvalue' from dual union select 'LAST 1 Year' as 'key', 'LAST 1 Year' as 'displayvalue' from dual"  }]  } | |  |
| 3.24 | | ✓ | | ✓ | | Click on **Create**. |  |
| 3.25 | | ✓ | | ✓ | | 1. Go back to Home page. 2. Goto Admin. 3. Click on Menu(three lines) option on top left corner. 4. Select **Sav Roles**. 5. Select **Role Admin** from the role list. 6. Navigate to **Dashboard** tab. 7. Scroll down and check for **Identity Repository - Admin**. 8. Click on **Add Dashboard**, Popup will appear. 9. On Search bar, Search for Dashboard Name “**Birthright Exchange Account Provisioning Status”**. 10. Click on **ADD** and close the tab. |  |
| **HomeDrive Birthright Provisioning** | | | | | | | |
| 1. Steps to export the Report for **HomeDrive Birthright Provisioning** and update endpoint names | | | | | | | |
| 4.0 | ✓ | | ✓ | | Login to SSM with administrator user credential. | |  |
| 4.1 | ✓ | | ✓ | | Click on **Admin** on the top right corner and then on click on **Export Package** under **Transport**. | |  |
| 4.2 | ✓ | | ✓ | | On the next page, type “**Analytics V2**” against objects to export as shown below | |  |
| 4.3 | ✓ | | ✓ | | Select the name of the Reports to be exported as a package and click on **Add**.   |  |  | | --- | --- | | Report Name | HomeDrive Birthright Provisioning Report | | |  |
| 4.4 | ✓ | | ✓ | | Next, click on **View Summary** on the bottom right. | |  |
| 4.5 | ✓ | | ✓ | | Finally, validate the Report you want to export and then click on **Export**. | |  |
| 4.6 | ✓ | | ✓ | | 1. Click on **Download**      1. Once the zip file is downloaded 2. Rename the file to “**HomeDrive\_Birthright\_Provisioning\_Report.zip”** 3. Unzip the file. | |  |
| 4.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present <File Names may vary from the screenshot>. Screenshot below:    This step is just to verify if the files are present. | |  |
| 4.8 | ✓ | | ✓ | | Open the JSON file with name like **‘AnalyticsV2\_%’** in any editor (Notepad,Notepad++). | |  |
| 4.9 | ✓ | | ✓ | | Modify the “**ANALYTICSQRY**” key with valid End Point Names which is specific to environment  **NOTE:** Please refer to the End Point Names table below for the values.   |  |  |  | | --- | --- | --- | | EndPoint Name in Query | Endpoint Name in QA | Endpoint Name in Prod | | esi::psscript::homedrive::test | esi::psscript::homedrive::test | esi::psscript::homedrive::prod | | esi::psscript::exchange::test | esi::psscript::exchange::test | esi::psscript::exchange::prod | | core::psscript::homedrive::test | core::psscript::homedrive::test | core::psscript::homedrive::prod | | core::exchange::cigna::dev | core::psscript::exchange::test | core::psscript::exchange::prod | | core::ad::rootsil::test | core::ad::rootsil::test | core::ad::internal::prod | | esi::ad::preaccounts\_preprod\_sand::test | esi::ad::preaccounts\_preprod\_sand::test | esi::ad::accounts::prod | | cigna::ad::globalcore\_did::dev | cigna::ad::globalcore\_did | cigna::ad::globalcore::gid, cigna::ad::globalcore\_did | | |  |
| 4.10 | ✓ | | ✓ | | Please search for “**INTERVAL 330 DAY**” replace it with “**INTERVAL 365 DAY**”. | |  |
| 4.11 | ✓ | | ✓ | | Save the JSON file | |  |
| 4.12 | ✓ | | ✓ | | Zip the folder with the latest JSON file. | |  |
| 1. Steps to import Reports.zip for **HomeDrive Birthright Provisioning Report** | | | | | | | |
| 4.13 | ✓ | | ✓ | | Copy the latest “**HomeDrive\_Birthright\_Provisioning\_Report.zip**” from last stepto the local machine from where QA/PROD Saviynt is accessible. | |  |
| 4.14 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 4.15 | ✓ | | ✓ | | Click on **Admin** tab from the top right corner menu. | |  |
| 4.16 | ✓ | | ✓ | | Expand **Transport** and click on **Import Package**. | |  |
| 4.17 | ✓ | | ✓ | | Click on **Browse** next to “**Choose package to import**” and navigate to release package folder. | |  |
| 4.18 | ✓ | | ✓ | | * Select **Exchange\_Birthright\_Provisioning\_Report.zip** ( The zip created in the previous step). * Click on open. * Provide the Business Justification. | |  |
| 4.19 | ✓ | | ✓ | | Click on **View Summary**. | |  |
| 4.20 | ✓ | | ✓ | | On the next page, click on **Request**. | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 4.21 | | ✓ | | ✓ | | Go to **Admin** 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select **Dashboard Configuration** |  |
| 4.22 | | ✓ | | ✓ | | To create new Dashboard, Click on **Action** button 🡪 Select **Create Dashboard**. |  |
| 4.23 | | ✓ | | ✓ | | On *Create New Dashboard* page, Give the below details:  **NOTE:**Below Highlighted Placeholders should be replaced with actual values from the environment.   * For Dashboard query, <ANALYTICSKEY> key value is taken from the Data Analyzer using the query :   *SELECT ANALYTICSKEY from analyticsconfiges where ANALYTICSNAME='HomeDrive Birthright Provisioning Report’*   |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | Birthright HomeDrive Account Provisioning Status | | 2 | Dashboard Type | ES PieChart | | 3 | Dashboard query | {  "analyticsConfig": "<ANALYTICSKEY>",  "fieldToGroup": "ProvisioningStatus",  "filterMap": {  "ProvisioningStatus":["Home Drive Provisioning Success","Home Drive Provisioning Failure"]  }  } | | 4 | Chart Properties | Mention {} in this field whenever you update the dashboard configuration. | | 5 | Status | Active | | 6 | Local Query | {  "analyticsConfig": "<ANALYTICSKEY>",  "fieldToGroup": "ProvisioningStatus",  "filterMap": {  "TIMEFRAME": ["${TIMEFRAME}"]  }  } | | 7 | Local Filter Query | {  "parameters": [{  "paramName": "TIMEFRAME",  "parentParam": "",  "label": "TIMEFRAME",  "type": "dropdown",  "dataType": "query",  "value": "select 'LAST 7 Days' as 'key', 'LAST 7 Days' as 'displayvalue' from dual union select 'LAST 1 Month' as 'key', 'LAST 1 Month' as 'displayvalue' from dual union select 'LAST 3 Months' as 'key', 'LAST 3 Months' as 'displayvalue' from dual union select 'LAST 1 Year' as 'key', 'LAST 1 Year' as 'displayvalue' from dual"  }]  } | |  |
| 4.24 | | ✓ | | ✓ | | Click on **Create.** |  |
| 4.25 | | ✓ | | ✓ | | 1. Go back to Home page. 2. Goto Admin. 3. Click on Menu(three lines) option on top left corner. 4. Select **Sav Roles**. 5. Select **Role Admin** from the role list. 6. Navigate to **Dashboard** tab. 7. Scroll down and check for **Identity Repository - Admin**. 8. Click on **Add Dashboard**, Popup will appear. 9. On Search bar, Search for Dashboard Name “**Birthright HomeDrive Account Provisioning Status”**. 10. Click on **ADD** and close the tab. |  |
| **Total Rehires Tile Dashboard** | | | | | | | |
| 1. Steps to export the Report for **Total Rehires** and update endpoint names | | | | | | | |
| 5.0 | ✓ | | ✓ | | Login to SSM with administrator user credential. | |  |
| 5.1 | ✓ | | ✓ | | Click on **Admin** on the top right corner and then on **Export Package** under **Transport**. | |  |
| 5.2 | ✓ | | ✓ | | On the next page, type “**Analytics V2**” against objects to export as shown below | |  |
| 5.3 | ✓ | | ✓ | | Select the name of the Reports to be exported as a package and click on **Add**.   |  |  | | --- | --- | | Report Name | Total Rehires Today | | |  |
| 5.4 | ✓ | | ✓ | | Next, click on **View Summary** on the bottom right. | |  |
| 5.5 | ✓ | | ✓ | | Finally, validate the Report you want to export and then click on **Export**. | |  |
| 5.6 | ✓ | | ✓ | | 1. Click on **Download**      1. Once the zip file is downloaded 2. Rename the file to “**Total\_Rehires\_Dashboard\_Report.zip”** 3. Unzip the file. | |  |
| 5.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present <File Names may vary from the screenshot>. Screenshot below:    This step is just to verify if the files are present. | |  |
| 5.8 | ✓ | | ✓ | | Open the JSON file with name like **‘AnalyticsV2\_%’** in any editor (Notepad,Notepad++). | |  |
| 5.9 | ✓ | | ✓ | | Modify the “**ANALYTICSQRY**” key with valid End Point Names which is specific to environment  **NOTE:** Please refer to the End Point Names table below for the values.   |  |  |  | | --- | --- | --- | | EndPoint Name in Query | Endpoint Name in QA | Endpoint Name in Prod | | esi::psscript::homedrive::test | esi::psscript::homedrive::test | esi::psscript::homedrive::prod | | esi::psscript::exchange::test | esi::psscript::exchange::test | esi::psscript::exchange::prod | | core::psscript::homedrive::test | core::psscript::homedrive::test | core::psscript::homedrive::prod | | core::exchange::cigna::dev | core::psscript::exchange::test | core::psscript::exchange::prod | | core::ad::rootsil::test | core::ad::rootsil::test | core::ad::internal::prod | | esi::ad::preaccounts\_preprod\_sand::test | esi::ad::preaccounts\_preprod\_sand::test | esi::ad::accounts::prod | | cigna::ad::globalcore\_did::dev | cigna::ad::globalcore\_did | cigna::ad::globalcore::gid, cigna::ad::globalcore\_did | | |  |
| 5.10 | ✓ | | ✓ | | Save the JSON file | |  |
| 5.11 | ✓ | | ✓ | | Zip the folder with the latest JSON file. | |  |
| 1. Steps to import Reports.zip for **Total Rehires Report** | | | | | | | |
| 5.12 | ✓ | | ✓ | | Copy the latest “**Total\_Rehires\_Dashboard\_Report.zip**” from last step to the local machine from where **QA/PROD** Saviynt is accessible. | |  |
| 5.13 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 5.14 | ✓ | | ✓ | | Click on **Admin** tab from the top right corner menu. | |  |
| 5.15 | ✓ | | ✓ | | Expand **Transport** and click on **Import Package**. | |  |
| 5.16 | ✓ | | ✓ | | Click on **Browse** next to “**Choose package to import**” and navigate to release package folder. | |  |
| 5.17 | ✓ | | ✓ | | * Select **Exchange\_Birthright\_Provisioning\_Report.zip** ( The zip created in the previous step). * Click on open. * Provide the Business Justification. | |  |
| 5.18 | ✓ | | ✓ | | Click on **View Summary**. | |  |
| 5.19 | ✓ | | ✓ | | On the next page, click on **Request.** | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 5.20 | | ✓ | | ✓ | | Go to **Admin** 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select **Dashboard Configuration** |  |
| 5.21 | | ✓ | | ✓ | | To create new Dashboard, Click on **Action** button 🡪 Select **Create Dashboard**. |  |
| 5.22 | | ✓ | | ✓ | | On *Create New Dashboard* page, Give the below details:  **NOTE:**Below Highlighted Placeholders should be replaced with actual values from the environment.   * For Dashboard query, <ANALYTICSKEY> key value is taken from the Data Analyzer using the query :   *SELECT ANALYTICSKEY from analyticsconfiges where ANALYTICSNAME='Total Rehires Today’*   |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | TotalRehiresToday | | 2 | Dashboard Type | ES Tile | | 3 | Dashboard Query | {"analyticsConfig":"<ANALYTICSKEY>","fieldToGroup":"USERTYPE"} | | 4 | Chart Properties | [{"tileType":1,"data":8,"clickable":"yes","chartType":"","objectName":"","className":"dashboard-stat red-intense","category":"","clickType":"analytics"}] | | 5 | Filter Type | Datapoint | | 6 | Status | Active | | 7 | Local Query | 1. {"analyticsConfig": "<ANALYTICSKEY>","fieldToGroup": "USERTYPE",   "filterMap": {"USERTYPE": ["${Rehire}"]}} | |  |
| 5.23 | | ✓ | | ✓ | | Click on **Create**. |  |
| 5.24 | | ✓ | | ✓ | | 1. Go back to Home page. 2. Goto Admin. 3. Click on Menu(three lines) option on top left corner. 4. Select **Sav Roles**. 5. Select **Role Admin** from the role list. 6. Navigate to **Dashboard** tab. 7. Scroll down and check for **Identity Repository - Admin**. 8. Click on **Add Dashboard**, Popup will appear. 9. On Search bar, Search for Dashboard Name “**Total Rehires Today”**. 10. Click on **ADD** and close the tab. |  |
| **Total New Hires Today Report Dashboard** | | | | | | | |
| 1. Steps to export the Report for **Total New Hires** and update endpoint names | | | | | | | |
| 6.0 | ✓ | | ✓ | | Login to **DEV** SSM with administrator user credential. | |  |
| 6.1 | ✓ | | ✓ | | Click on **Admin** on the top right corner and then on **Export Package** under **Transport**. | |  |
| 6.2 | ✓ | | ✓ | | On the next page, type “**Analytics V2**” against objects to export as shown below | |  |
| 6.3 | ✓ | | ✓ | | Select the name of the Reports to be exported as a package and click on **Add**.   |  |  | | --- | --- | | Report Name | Total New Hires Today | | |  |
| 6.4 | ✓ | | ✓ | | Next, click on **View Summary** on the bottom right. | |  |
| 6.5 | ✓ | | ✓ | | Finally, validate the Report you want to export and then click on **Export.** | |  |
| 6.6 | ✓ | | ✓ | | 1. Click on **Download**      1. Once the zip file is downloaded 2. Rename the file to “**New\_Hires\_Dashboard\_Report.zip”** 3. Unzip the file. | |  |
| 6.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present <File Names may vary from the screenshot>. Screenshot below:    This step is just to verify if the files are present. | |  |
| 6.8 | ✓ | | ✓ | | Open the JSON file with name like **‘AnalyticsV2\_%’** in any editor (Notepad,Notepad++). | |  |
| 6.9 | ✓ | | ✓ | | Modify the “**ANALYTICSQRY**” key with valid End Point Names which is specific to environment  **NOTE:** Please refer to the End Point Names table below for the values.   |  |  |  | | --- | --- | --- | | EndPoint Name in Query | Endpoint Name in QA | Endpoint Name in Prod | | esi::psscript::homedrive::test | esi::psscript::homedrive::test | esi::psscript::homedrive::prod | | esi::psscript::exchange::test | esi::psscript::exchange::test | esi::psscript::exchange::prod | | core::psscript::homedrive::test | core::psscript::homedrive::test | core::psscript::homedrive::prod | | core::exchange::cigna::dev | core::psscript::exchange::test | core::psscript::exchange::prod | | core::ad::rootsil::test | core::ad::rootsil::test | core::ad::internal::prod | | esi::ad::preaccounts\_preprod\_sand::test | esi::ad::preaccounts\_preprod\_sand::test | esi::ad::accounts::prod | | cigna::ad::globalcore\_did::dev | cigna::ad::globalcore\_did | cigna::ad::globalcore::gid, cigna::ad::globalcore\_did | | |  |
| 6.10 | ✓ | | ✓ | | Save the JSON file | |  |
| 6.11 | ✓ | | ✓ | | Zip the folder with the latest JSON file. | |  |
| 1. Steps to import Reports.zip for **Total New Hires Report** | | | | | | | |
| 6.12 | ✓ | | ✓ | | Copy the latest “**Total\_New\_Hires\_Dashboard\_Report.zip**” in last step to the local machine from where QA/PROD Saviynt is accessible. | |  |
| 6.13 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 6.14 | ✓ | | ✓ | | Click on **Admin** tab from the top right corner menu. | |  |
| 6.15 | ✓ | | ✓ | | Expand **Transport** and click on **Import Package**. | |  |
| 6.16 | ✓ | | ✓ | | Click on **Browse** next to “**Choose package to import**” and navigate to release package folder. | |  |
| 6.17 | ✓ | | ✓ | | * Select **Total\_New\_Hires\_Dashboard\_Report.zip** ( The zip created in the previous step). * Click on open. * Provide the Business Justification. | |  |
| 6.18 | ✓ | | ✓ | | Click on **View Summary**. | |  |
| 6.19 | ✓ | | ✓ | | On the next page, click on **Request**. | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 6.20 | | ✓ | | ✓ | | Go to **Admin** 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select **Dashboard Configuration** |  |
| 6.21 | | ✓ | | ✓ | | To create new Dashboard, Click on **Action** button 🡪 Select **Create Dashboard**. |  |
| 6.22 | | ✓ | | ✓ | | On *Create New Dashboard* page, Give the below details:  **NOTE:**Below Highlighted Placeholders should be replaced with actual values from the environment.   * For Dashboard query, <ANALYTICSKEY> key value is taken from the Data Analyzer using the query :   *SELECT ANALYTICSKEY from analyticsconfiges where ANALYTICSNAME='Total New Hires Today’*   |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | Total New Hires Today | | 2 | Dashboard Type | ES Tile | | 3 | Dashboard Query | {"analyticsConfig":"<ANALYTICSKEY>","fieldToGroup":"USERTYPE"} | | 4 | Chart Properties | [{"tileType":1,"data":19,"clickable":"yes","chartType":"","objectName":"","className":"dashboard-stat red-intense","category":"","clickType":"analytics"}] | | 5 | Filter Type | Datapoint | | 6 | Status | Active | | 7 | Local Query | 1. {"analyticsConfig": "<ANALYTICSKEY>","fieldToGroup": "USERTYPE",   "filterMap": {"USERTYPE": ["${New User}"]}} | |  |
| 6.23 | | ✓ | | ✓ | | Click on **Create**. |  |
| 6.24 | | ✓ | | ✓ | | 1. Go back to Home page. 2. Goto Admin. 3. Click on Menu(three lines) option on top left corner. 4. Select **Sav Roles**. 5. Select **Role Admin** from the role list. 6. Navigate to **Dashboard** tab. 7. Scroll down and check for **Identity Repository - Admin**. 8. Click on **Add Dashboard**, Popup will appear. 9. On Search bar, Search for Dashboard Name “**Total New Hires Today”**. 10. Click on **ADD** and close the tab. |  |
| **Total AD Account Provisioned today Report Dashboard** | | | | | | | |
| 1. Steps to export the Report for **AD Account Provisioned Today** and update endpoint names | | | | | | | |
| 7.0 | ✓ | | ✓ | | Login to SSM with administrator user credential. | |  |
| 7.1 | ✓ | | ✓ | | Click on **Admin** on the top right corner and then on **Export Package** under **Transport**. | |  |
| 7.2 | ✓ | | ✓ | | On the next page, type “**Analytics V2**” against objects to export as shown below | |  |
| 7.3 | ✓ | | ✓ | | Select the name of the Reports to be exported as a package and click on **Add**.   |  |  | | --- | --- | | Report Name | AD Account Provisioned Today Report | | |  |
| 7.4 | ✓ | | ✓ | | Next, click on **View Summary** on the bottom right. | |  |
| 7.5 | ✓ | | ✓ | | Finally, validate the Reports you want to export and then click on **Export**. | |  |
| 7.6 | ✓ | | ✓ | | 1. Click on **Download**      1. Once the zip file is downloaded 2. Rename the file to “**AD\_Account\_Provisioned\_Today\_Report.zip”** 3. Unzip the file. | |  |
| 7.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present <File Names may vary from the screenshot>. Screenshot below:    This step is just to verify if the files are present. | |  |
| 7.8 | ✓ | | ✓ | | Open the JSON file with name like **‘AnalyticsV2\_%’** in any editor (Notepad,Notepad++). | |  |
| 7.9 | ✓ | | ✓ | | Modify the “**ANALYTICSQRY**” key with valid End Point Names which is specific to environment  **NOTE:** Please refer to the End Point Names table below for the values.   |  |  |  | | --- | --- | --- | | EndPoint Name in Query | Endpoint Name in QA | Endpoint Name in Prod | | esi::psscript::homedrive::test | esi::psscript::homedrive::test | esi::psscript::homedrive::prod | | esi::psscript::exchange::test | esi::psscript::exchange::test | esi::psscript::exchange::prod | | core::psscript::homedrive::test | core::psscript::homedrive::test | core::psscript::homedrive::prod | | core::exchange::cigna::dev | core::psscript::exchange::test | core::psscript::exchange::prod | | core::ad::rootsil::test | core::ad::rootsil::test | core::ad::internal::prod | | esi::ad::preaccounts\_preprod\_sand::test | esi::ad::preaccounts\_preprod\_sand::test | esi::ad::accounts::prod | | |  |
| 7.10 | ✓ | | ✓ | | Save the JSON file | |  |
| 7.11 | ✓ | | ✓ | | Zip the folder with the latest JSON file. | |  |
| 1. Steps to import Reports.zip for **AD Account Provisioned Today Report** | | | | | | | |
| 7.12 | ✓ | | ✓ | | Copy the latest “**AD\_Account\_Provisioned\_Today\_Report.zip**” from last step to the local machine from where **QA/PROD** Saviynt is accessible. | |  |
| 7.13 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 7.14 | ✓ | | ✓ | | Click on **Admin** tab from the top right corner menu. | |  |
| 7.15 | ✓ | | ✓ | | Expand **Transport** and click on **Import Package**. | |  |
| 7.16 | ✓ | | ✓ | | Click on **Browse** next to “**Choose package to import**” and navigate to release package folder. | |  |
| 7.17 | ✓ | | ✓ | | * Select **AD\_Account\_Provisioned\_Today\_Report.zip** ( The zip created in the previous step). * Click on open. * Provide the Business Justification. | |  |
| 7.18 | ✓ | | ✓ | | Click on **View Summary**. | |  |
| 7.19 | ✓ | | ✓ | | On the next page, click on **Request**. | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 7.20 | | ✓ | | ✓ | | Go to **Admin** 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select **Dashboard Configuration** |  |
| 7.21 | | ✓ | | ✓ | | To create new Dashboard, Click on **Action** button 🡪 Select **Create Dashboard**. |  |
| 7.22 | | ✓ | | ✓ | | On *Create New Dashboard* page, Give the below details:  **NOTE:**Below Highlighted Placeholders should be replaced with actual values from the environment.   * For Dashboard query, <ANALYTICSKEY> key value is taken from the Data Analyzer using the query :   *SELECT ANALYTICSKEY from analyticsconfiges where ANALYTICSNAME=’AD Account Provisioned Today Report ’*   |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | Total AD Account Provisioned Today | | 2 | Dashboard Type | ES Tile | | 3 | Dashboard Query | {"analyticsConfig":"<ANALYTICSKEY>","fieldToGroup":"ProvisioningStatus"} | | 4 | Chart Properties | [{"tileType":1,"data":8,"clickable":"yes","chartType":"","objectName":"","className":"dashboard-stat red-intense","category":"","clickType":"analytics"}] | | 5 | Filter Type | Datapoint | | 6 | Status | Active | | 7 | Local Query | 1. {"analyticsConfig": "<ANALYTICSKEY>","fieldToGroup": "ProvisioningStatus",   "filterMap": {"USERTYPE": ["${AD Provisioning Success}"]}} | |  |
| 7.23 | | ✓ | | ✓ | | Click on Create. |  |
| 7.24 | | ✓ | | ✓ | | 1. Go back to Home page. 2. Goto Admin. 3. Click on Menu(three lines) option on top left corner. 4. Select **Sav Roles**. 5. Select **Role Admin** from the role list. 6. Navigate to **Dashboard** tab. 7. Scroll down and check for **Identity Repository - Admin**. 8. Click on **Add Dashboard**, Popup will appear. 9. On Search bar, Search for Dashboard Name “**Total AD Account Provisioned Today”**. 10. Click on **ADD** and close the tab. |  |
|  | |  | |  | |  |  |
| **Cigna and ESI Mover Status** | | | | | | | |
| 1. Steps to export the Report for **Cigna and ESI Mover Status** | | | | | | | |
| 8.0 | ✓ | | ✓ | | Login to SSM with administrator user credential. | |  |
| 8.1 | ✓ | | ✓ | | Click on **Admin** on the top right corner and then on **Export Package** under **Transport**. | |  |
| 8.2 | ✓ | | ✓ | | On the next page, type “**Analytics V2**” against objects to export as shown below | |  |
| 8.3 | ✓ | | ✓ | | Select the name of the Reports to be exported as a package and click on “**Add**”.   |  |  | | --- | --- | | Report Name | Cigna and ESI Mover Status Report | | |  |
| 8.4 | ✓ | | ✓ | | Next, click on **View Summary** on the bottom right. | |  |
| 8.5 | ✓ | | ✓ | | Finally, validate the Report you want to export and then click on **Export**. | |  |
| 8.6 | ✓ | | ✓ | | 1. Click on **Download**      1. Once the zip file is downloaded 2. Rename the file to “**ESI\_Mover\_Status\_Dashboard\_Report.zip”** 3. Unzip the file. | |  |
| 8.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present <File Names may vary from the screenshot>. Screenshot below:    This step is just to verify if the files are present. | |  |
| 8.8 | ✓ | | ✓ | | Open the JSON file with name like **‘AnalyticsV2\_%’** in any editor (Notepad,Notepad++). | |  |
| 8.9 | ✓ | | ✓ | | Please search for “**INTERVAL 330 DAY**” replace it with “**INTERVAL 365 DAY**”. | |  |
| 8.10 | ✓ | | ✓ | | Save the JSON file. | |  |
| 8.11 | ✓ | | ✓ | | Zip the folder with the latest JSON file. | |  |
| 1. Steps to import Reports.zip for **Cigna and ESI Mover Status Dashboard** | | | | | | | |
| 8.12 | ✓ | | ✓ | | Copy the latest “**Cigna and ESI\_Mover\_Status\_Dashboard\_Report.zip”** from last step to the local machine from where QA/PROD Saviynt is accessible. | |  |
| 8.13 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 8.14 | ✓ | | ✓ | | Click on **Admin** tab from the top right corner menu. | |  |
| 8.15 | ✓ | | ✓ | | Expand **Transport** and click on **Import Package**. | |  |
| 8.16 | ✓ | | ✓ | | Click on **Browse** next to “**Choose package to import**” and navigate to release package folder. | |  |
| 8.17 | ✓ | | ✓ | | * Select **Cigna and ESI\_Mover\_Status\_Dashboard\_Report.zip** ( The zip created in the previous step). * Click on open. * Provide the Business Justification. | |  |
| 8.18 | ✓ | | ✓ | | Click on **View Summary**. | |  |
| 8.19 | ✓ | | ✓ | | On the next page, click on **Request**. | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 8.20 | | ✓ | | ✓ | | Go to **Admin** 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select **Dashboard Configuration** |  |
| 8.21 | | ✓ | | ✓ | | To create new Dashboard, Click on **Action** button 🡪 Select **Create Dashboard**. |  |
| 8.22 | | ✓ | | ✓ | | On *Create New Dashboard* page, Give the below details:  **NOTE:**Below Highlighted Placeholders should be replaced with actual values from the environment.   * For Dashboard query, <ANALYTICSKEY> key value is taken from the Data Analyzer using the query :   *SELECT ANALYTICSKEY from analyticsconfiges where ANALYTICSNAME=’Cigna and ESI Mover Report’*   |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | Cigna and ESI Mover Status | | 2 | Dashboard Type | ES PieChart | | 3 | Dashboard query | {  "analyticsConfig": "<ANALYTICSKEY>",  "fieldToGroup": "CONVERSION",  "filterMap": {  "CONVERSION":["Cigna To ESI","ESI To Cigna"]  }  } | | 4 | Chart Properties | Mention {} in this field whenever you update the dashboard configuration. | | 5 | Status | Active | | 6 | Local Query | {  "analyticsConfig": "<ANALYTICSKEY>",  "fieldToGroup": "CONVERSION",  "filterMap": {  "TIMEFRAME": ["${TIMEFRAME}"]  }  } | | 7 | Local Filter Query | {  "parameters": [{  "paramName": "TIMEFRAME",  "parentParam": "",  "label": "TIMEFRAME",  "type": "dropdown",  "dataType": "query",  "value": "select 'LAST 7 days' as 'key', 'LAST 7 days' as 'displayvalue' from dual union select 'LAST 1 Month' as 'key', 'LAST 1 Month' as 'displayvalue' from dual union select 'LAST 3 Months' as 'key', 'LAST 3 Months' as 'displayvalue' from dual union select 'LAST 1 Year' as 'key', 'LAST 1 Year' as 'displayvalue' from dual"  }]  } | |  |
| 8.23 | | ✓ | | ✓ | | Click on Create. |  |
| 8.24 | | ✓ | | ✓ | | 1. Go back to Home page. 2. Goto Admin. 3. Click on Menu(three lines) option on top left corner. 4. Select **Sav Roles**. 5. Select **Role Admin** from the role list. 6. Navigate to **Dashboard** tab. 7. Scroll down and check for **Identity Repository - Admin**. 8. Click on **Add Dashboard**, Popup will appear. 9. On Search bar, Search for Dashboard Name “**Cigna and ESI Mover Status”**. 10. Click on **ADD** and close the tab. |  |

# Section 3 – Validation Steps

*These steps validate the change.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Step | QA Deploy | Prod Deploy | Step Instruction | Duration |
| 1 | ✓ | ✓ | Validate following configurations are updated:   * Login to Saviynt Security Manager (SSM) as administrator * Goto “Intelligence” under application icon on top right corner 🡪 Click on “Menu”(three lines) option on top left corner 🡪 Select “Analytics Configuration list”. * [**Report Name List**: New Hires and Rehires Report, AD Birthright Provisioning Report, Exchange Birthright Provisioning Report, HomeDrive Birthright Provisioning Report, Total Rehires, Total New Hires, AD Account Provisioned Today Report, Cigna and ESI Mover Status Report]. Follow the steps below for each report. * On Search bar, Search for all Reports created one by one. * On “Analytics Configuration list” page 🡪 Search “Report Name” 🡪 Click on “Run” button on top right corner 🡪 On dropdown, Select “Run Now” option to save the configurations to database. * Click "Admin" under application icon -> Goto Menu option -> Search for "Dashboard Configuration". * [**Dashboard List**: New Hires and Rehires, Birthright Active Directory Account Provisioning Status, Birthright Exchange Account Provisioning Status, Birthright HomeDrive Account Provisioning Status, Total Rehires Today, Total New Hires Today, Total AD Account Provisioned Today, Cigna and ESI Mover Status Dashboard]. * On Dashboard configuration List page , On search bar -> search all the reports one by one listed above for Dashboard -> Validate the advanced query for each dashboard. * Go to “Admin” 🡪 Click on Menu option on top left corner 🡪 Under “Identity Repository”, Click on “Dashboard”. * To Validate the Dashboard results, Click on Menu option -> Search for "Dashboard". * **Under Identity Repository Charts**:-  1. Search for ”**New Hires and Rehires**” Dashboard 2. Check whether you are able to reflect the count of New User and Rehires on Piechart. 3. Check if Piechart reflects the data according to the selection of Timeframe. 4. After Clicking on Piechart, Check if you are navigated to detailed report. 5. Search for ” **Birthright Active Directory Account Provisioning Status**” Dashboard 6. Check whether you are able to reflect the count of ‘ad provisioning failure’ and ‘ad provisioning success’ on Piechart. 7. Check if Piechart reflects the data according to the selection of Timeframe given. 8. After Clicking on Piechart, Check if you are navigated to detailed report. 9. Search for ” **Birthright Exchange Account Provisioning Status**” Dashboard 10. Check whether you are able to reflect the count of ‘Exchange provisioning failure’ and ‘Exchange provisioning success’ on Piechart. 11. Check if Piechart reflects the data according to the selection of Timeframe. 12. After Clicking on Piechart, Check if you are navigated to detailed report. 13. Search for” **Birthright HomeDrive Account Provisioning Status**” Dashboard 14. Check whether you are able to reflect the count of ‘Homedrive provisioning failure’ and ‘Homedrive provisioning success’ on Piechart. 15. Check if Piechart reflects the data according to the selection of Timeframe. 16. After Clicking on Piechart, Check if you are navigated to detailed report. 17. Search for”**Cigna and ESI Mover Status Dashboard**” Dashboard 18. Check whether you are able to reflect the count of ‘Cigna To ESI’ and ‘ESI To Cigna’ on Piechart. 19. Check if Piechart reflects the data according to the selection of Timeframe given. 20. After Clicking on Piechart, Check if you are navigated to detailed report.  * **Under ID repository Tiles**:-  1. Check if the **Total Rehires Today**, **Total New Hires Today and Total AD Account Provisioned Today** Tiles are created with updated count. 2. After clicking on tiles, Check if you are navigated to detailed reports of respective tiles. |  |

# Section 4 –Backout/Restore Instructions

*These are the steps to backout the change if there is an issue that requires removal of the change.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Step | QA Deploy | Prod Deploy | Step Instruction | Duration |
| 1 | ✓ | ✓ | Delete the above analytics and dashboard reports generated to revert back the changes in Saviynt |  |