# Saviynt Deployment Document

|  |  |
| --- | --- |
| Jira Story Number | IFEIAMPS-3680 |
| Jira Story Name | Termination Metrics – Dashboard |
| Deployment Document Author | KPMG |
| Document Creation Date | 9/12/2023 |

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 |
| **Total Users Disabled on Termination Dashboard** | | | | | | | |
| 1. Steps to export the total users disabled on termination report. | | | | | | | |
| 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 | Total Users Disabled on Termination Analytics | | |  |
| 1.4 | ✓ | | ✓ | | Next, click on View Summary on the bottom right. | |  |
| 1.5 | ✓ | | ✓ | | Finally, validate the Reports you want to export and then click on Export. | |  |
| 1.6 | ✓ | | ✓ | | Once the zip file is downloaded 🡪 Rename the file to Total\_users\_disabled\_Report.zip and then unzip the file. | |  |
| 1.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present. Screenshot shown below: | |  |
| 1. Steps to import Reports.zip for Total users disabled on termination | | | | | | | |
| 1.8 | ✓ | | ✓ | | Total\_users\_disabled\_Report.zip ( to the local machine from where QA/PROD Saviynt is accessible. | |  |
| 1.9 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 1.10 | ✓ | | ✓ | | Click on “Admin” tab from the top right corner menu. | |  |
| 1.11 | ✓ | | ✓ | | Click “Transport”. Under “Transport” select “Import Package”. | |  |
| 1.12 | ✓ | | ✓ | | Click on “Browse” next to “Choose package to import” and navigate to release package folder. | |  |
| 1.13 | ✓ | | ✓ | | Select Total\_users\_disabled\_Report.zip ( The zip created in the previous step) and click on open. Provide the Business Justification. | |  |
| 1.14 | ✓ | | ✓ | | Click on “View Summary”. | |  |
| 1.15 | ✓ | | ✓ | | On the next page, click on “Request”. | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 1.16 | | ✓ | | ✓ | | Go to Admin 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select “Dashboard Configuration” |  |
| 1.17 | | ✓ | | ✓ | | To create new Dashboard, Click on “Action” button 🡪 Select “Create Dashboard”. |  |
| 1.18 | | ✓ | | ✓ | | On “Create New Dashboard” Page, Give the below details:   |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | Total Users Disabled on Termination | | 2 | Dashboard Type | ES PieChart | | 3 | Dashboard query | {  "analyticsConfig": "1652",  "fieldToGroup": "User Status",  "filterMap": {  "User Status":["Users Disabled"]  }  } | | 4 | Chart Properties | Mention {} in this field whenever you update the dashboard configuration. | | 5 | Status | Active | | 6 | Local Query | {  "analyticsConfig": "1652",  "fieldToGroup": "User Status",  "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"  }]  } |   **Note :** For dashboard query, analyticsConfig key value is taken from the URL of that analytics. Follow the below steps to achieve the Key value.  Goto Applications icon on top right corner 🡪 Select “Intelligence” 🡪 Click on “Menu” (Three lines)option on top left corner 🡪 Select “Analytics Configuration List” 🡪 On search box, search “**Total Users Disabled on Termination Analytics**” analytics🡪 click on “**Total Users Disabled on Termination Analytics”**   1. On “Analytics Configuration Details” page, Check the URL for this analytics. Copy the key value from URL and use it for dashboard query. |  |
| 1.19 | | ✓ | | ✓ | | Click on Create. |  |
| 1.20 | | ✓ | | ✓ | | Go back to Home page, Goto “Admin” under application icon 🡪 Click on “Menu”(three lines) option on top left corner 🡪 Select “**Sav Roles**” 🡪 Select “**Role Admin**” from the role list 🡪 Navigate to “**Dashboard**” tab 🡪 Scroll down and check for “**Identity Repository - Admin**” 🡪 Click on “**Add Dashboard**”,Popup will appear 🡪 On Search bar, Search for Dashboard Name given 🡪 Click on “**Save**”. |  |
| **Total AD Account Disabled Status Dashboard** | | | | | | | |
| 1. Steps to export the Total AD Account Disabled Status Report. | | | | | | | |
| 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 | Total AD Account Disabled Status Analytics | | |  |
| 2.4 | ✓ | | ✓ | | Next, click on View Summary on the bottom right. | |  |
| 2.5 | ✓ | | ✓ | | Finally, validate the Reports you want to export and then click on Export. | |  |
| 2.6 | ✓ | | ✓ | | Once the zip file is downloaded 🡪 Rename the file to Total\_ADaccount\_disabled\_report.zip and then unzip the file. | |  |
| 2.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present. Screenshot shown below: | |  |
| 1. Steps to import Reports.zip for Total AD Account Disabled Status | | | | | | | |
| 2.8 | ✓ | | ✓ | | Copy Total\_ADaccount\_disabled\_report.zip ( to the local machine from where QA/PROD Saviynt is accessible. | |  |
| 2.9 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 2.10 | ✓ | | ✓ | | Click on “Admin” tab from the top right corner menu. | |  |
| 2.11 | ✓ | | ✓ | | Click “Transport”. Under “Transport” select “Import Package”. | |  |
| 2.12 | ✓ | | ✓ | | Click on “Browse” next to “Choose package to import” and navigate to release package folder. | |  |
| 2.13 | ✓ | | ✓ | | Select Total\_ADaccount\_disabled\_report.zip ( The zip created in the previous step) and click on open. Provide the Business Justification. | |  |
| 2.14 | ✓ | | ✓ | | Click on “View Summary”. | |  |
| 2.15 | ✓ | | ✓ | | On the next page, click on “Request”. | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 2.16 | | ✓ | | ✓ | | Go to Admin 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select “Dashboard Configuration” |  |
| 2.17 | | ✓ | | ✓ | | To create new Dashboard, Click on “Action” button 🡪 Select “Create Dashboard”. |  |
| 2.18 | | ✓ | | ✓ | | On “Create New Dashboard” Page, Give the below details:   |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | Total AD Account Disable Status Dashboard | | 2 | Dashboard Type | ES PieChart | | 3 | Dashboard query | {  "analyticsConfig": "1654",  "fieldToGroup": "AD Action Status",  "filterMap": {  "AD Action Status":["SUCCESS","FAILURE"]  }  } | | 4 | Chart Properties | Mention {} in this field whenever you update the dashboard configuration. | | 5 | Status | Active | | 6 | Local Query | {  "analyticsConfig": "1654",  "fieldToGroup": "AD Action Status",  "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"  }]  } |   **Note :** For dashboard query, analyticsConfig key value is taken from the URL of that analytics. Follow the below steps to achieve the Key value.  Goto Applications icon on top right corner 🡪 Select “Intelligence” 🡪 Click on “Menu” (Three lines)option on top left corner 🡪 Select “Analytics Configuration List” 🡪 On search box, search “**Total AD Account Disabled Status Analytics**” analytics🡪 click on “**Total AD Account Disabled Status Analytics**”   1. On “Analytics Configuration Details” page, Check the URL for this analytics. Copy the key value from URL and use it for dashboard query. |  |
| 2.19 | | ✓ | | ✓ | | Click on Create. |  |
| 2.20 | | ✓ | | ✓ | | Go back to Home page, Goto “Admin” under application icon 🡪 Click on “Menu”(three lines) option on top left corner 🡪 Select “**Sav Roles**” 🡪 Select “**Role Admin**” from the role list 🡪 Navigate to “**Dashboard**” tab 🡪 Scroll down and check for “**Identity Repository - Admin**” 🡪  Click on “**Add Dashboard**”,Popup will appear 🡪 On Search bar, Search for Dashboard Name given 🡪 Click on “**Save**”. |  |
| **Total Exchange Account Disabled Status Dashboard** | | | | | | | |
| 1. Steps to export the Total Exchange Account Disabled Status Report. | | | | | | | |
| 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 | Total Exchange Account Disabled Status Analytics | | |  |
| 3.4 | ✓ | | ✓ | | Next, click on View Summary on the bottom right. | |  |
| 3.5 | ✓ | | ✓ | | Finally, validate the Reports you want to export and then click on Export. | |  |
| 3.6 | ✓ | | ✓ | | Once the zip file is downloaded 🡪 Rename the file to Total\_ExchangeAccount \_Disabled\_Report.zip and then unzip the file. | |  |
| 3.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present. Screenshot shown below: | |  |
| 1. Steps to import Reports.zip for Total Exchange Account Disabled Status | | | | | | | |
| 3.8 | ✓ | | ✓ | | Copy Total\_ExchangeAccount \_Disabled\_Report.zip ( to the local machine from where QA/PROD Saviynt is accessible. | |  |
| 3.9 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 3.10 | ✓ | | ✓ | | Click on “Admin” tab from the top right corner menu. | |  |
| 3.11 | ✓ | | ✓ | | Click “Transport”. Under “Transport” select “Import Package”. | |  |
| 3.12 | ✓ | | ✓ | | Click on “Browse” next to “Choose package to import” and navigate to release package folder. | |  |
| 3.13 | ✓ | | ✓ | | Select Total\_ExchangeAccount \_Disabled\_Report.zip ( The zip created in the previous step) and click on open. Provide the Business Justification. | |  |
| 3.14 | ✓ | | ✓ | | Click on “View Summary”. | |  |
| 3.15 | ✓ | | ✓ | | On the next page, click on “Request”. | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 3.16 | | ✓ | | ✓ | | Go to Admin 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select “Dashboard Configuration” |  |
| 3.17 | | ✓ | | ✓ | | To create new Dashboard, Click on “Action” button 🡪 Select “Create Dashboard”. |  |
| 3.18 | | ✓ | | ✓ | | On “Create New Dashboard” Page, Give the below details:   |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | Total Exchange Account Disabled Status Dashboard | | 2 | Dashboard Type | ES PieChart | | 3 | Dashboard query | {  "analyticsConfig": "1650",  "fieldToGroup": "Cigna Exchange Action Status",  "filterMap": { "Cigna Exchange Action Status":["Mailbox Hidden","FAILURE"]  }  } | | 4 | Chart Properties | Mention {} in this field whenever you update the dashboard configuration. | | 5 | Status | Active | | 6 | Local Query | {  "analyticsConfig": "1650",  "fieldToGroup": "Cigna Exchange Action Status",  "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 "  }]  } |   **Note :** For dashboard query, analyticsConfig key value is taken from the URL of that analytics. Follow the below steps to achieve the Key value.  Goto Applications icon on top right corner 🡪 Select “Intelligence” 🡪 Click on “Menu” (Three lines)option on top left corner 🡪 Select “Analytics Configuration List” 🡪 On search box, search “**Total Exchange Account Disabled Status Analytics**” analytics🡪 click on “**Total Exchange Account Disabled Status Analytics**”   1. On “Analytics Configuration Details” page, Check the URL for this analytics. Copy the key value from URL and use it for dashboard query. |  |
| 3.19 | | ✓ | | ✓ | | Click on Create. |  |
| 3.20 | | ✓ | | ✓ | | Go back to Home page, Goto “Admin” under application icon 🡪 Click on “Menu”(three lines) option on top left corner 🡪 Select “**Sav Roles**” 🡪 Select “**Role Admin**” from the role list 🡪 Navigate to “**Dashboard**” tab 🡪 Scroll down and check for “**Identity Repository - Admin**” 🡪  Click on “**Add Dashboard**”,Popup will appear 🡪 On Search bar, Search for Dashboard Name given 🡪 Click on “**Save**”. |  |
| **Total Cigna RACF Account Disabled Status Dashboard** | | | | | | | |
| 1. Steps to export the Total Cigna RACF Account Disabled Status Report. | | | | | | | |
| 4.0 | ✓ | | ✓ | | Login to SSM with administrator user credential. | |  |
| 4.1 | ✓ | | ✓ | | Click on “Admin” on the top right corner and then 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 | Total Cigna RACF Account Disabled Status Analytics | | |  |
| 4.4 | ✓ | | ✓ | | Next, click on View Summary on the bottom right. | |  |
| 4.5 | ✓ | | ✓ | | Finally, validate the Reports you want to export and then click on Export. | |  |
| 4.6 | ✓ | | ✓ | | Once the zip file is downloaded 🡪 Rename the file to Total\_Cigna\_RACFAccount \_Disabled\_Report.zip and then unzip the file. | |  |
| 4.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present. Screenshot shown below: | |  |
| 1. Steps to import Reports.zip for Total Cigna RACF Account Disabled Status | | | | | | | |
| 4.8 | ✓ | | ✓ | | Copy Total\_Cigna\_RACFAccount \_Disabled\_Report.zip ( to the local machine from where QA/PROD Saviynt is accessible. | |  |
| 4.9 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 4.10 | ✓ | | ✓ | | Click on “Admin” tab from the top right corner menu. | |  |
| 4.11 | ✓ | | ✓ | | Click “Transport”. Under “Transport” select “Import Package”. | |  |
| 4.12 | ✓ | | ✓ | | Click on “Browse” next to “Choose package to import” and navigate to release package folder. | |  |
| 4.13 | ✓ | | ✓ | | Select Total\_Cigna\_RACFAccount \_Disabled\_Report.zip ( The zip created in the previous step) and click on open. Provide the Business Justification. | |  |
| 4.14 | ✓ | | ✓ | | Click on “View Summary”. | |  |
| 4.15 | ✓ | | ✓ | | On the next page, click on “Request”. | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 4.16 | | ✓ | | ✓ | | Go to Admin 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select “Dashboard Configuration” |  |
| 4.17 | | ✓ | | ✓ | | To create new Dashboard, Click on “Action” button 🡪 Select “Create Dashboard”. |  |
| 4.18 | | ✓ | | ✓ | | On “Create New Dashboard” Page, Give the below details:   |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | Total Cigna RACF Account Disabled Status | | 2 | Dashboard Type | ES PieChart | | 3 | Dashboard query | {  "analyticsConfig": "1663",  "fieldToGroup": "Cigna RACF Action Status",  "filterMap": {  "Cigna RACF Action Status":["Mailbox Hidden","FAILURE"]  }  } | | 4 | Chart Properties | Mention {} in this field whenever you update the dashboard configuration. | | 5 | Status | Active | | 6 | Local Query | {  "analyticsConfig": "1663",  "fieldToGroup": "Cigna RACF Action Status",  "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 "  }]  } |   **Note :** For dashboard query, analyticsConfig key value is taken from the URL of that analytics. Follow the below steps to achieve the Key value.  Goto Applications icon on top right corner 🡪 Select “Intelligence” 🡪 Click on “Menu” (Three lines)option on top left corner 🡪 Select “Analytics Configuration List” 🡪 On search box, search “**Total Cigna RACF Account Disabled Status Analytics**” analytics🡪 click on “**Total Cigna RACF Account Disabled Status Analytics**”   1. On “Analytics Configuration Details” page, Check the URL for this analytics. Copy the key value from URL and use it for dashboard query. |  |
| 4.19 | | ✓ | | ✓ | | Click on Create. |  |
| 4.20 | | ✓ | | ✓ | | Go back to Home page, Goto “Admin” under application icon 🡪 Click on “Menu”(three lines) option on top left corner 🡪 Select “**Sav Roles**” 🡪 Select “**Role Admin**” from the role list 🡪 Navigate to “**Dashboard**” tab 🡪 Scroll down and check for “**Identity Repository - Admin**” 🡪  Click on “**Add Dashboard**”,Popup will appear 🡪 On Search bar, Search for Dashboard Name given 🡪 Click on “**Save**”. |  |
| **Total ESI RACF Account Disabled Status Dashboard** | | | | | | | |
| 1. Steps to export the Total ESI RACF Account Disabled Status Report. | | | | | | | |
| 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 ESI RACF Account Disabled Status Analytics | | |  |
| 5.4 | ✓ | | ✓ | | Next, click on View Summary on the bottom right. | |  |
| 5.5 | ✓ | | ✓ | | Finally, validate the Reports you want to export and then click on Export. | |  |
| 5.6 | ✓ | | ✓ | | Once the zip file is downloaded 🡪 Rename the file to Total\_ESI\_RACFAccount \_Disabled\_Report.zip and then unzip the file. | |  |
| 5.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present. Screenshot shown below: | |  |
| 1. Steps to import Reports.zip for Total ESI RACF Account Disabled Status | | | | | | | |
| 5.8 | ✓ | | ✓ | | Copy Total\_ESI\_RACFAccount \_Disabled\_Report.zip ( to the local machine from where QA/PROD Saviynt is accessible. | |  |
| 5.9 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 5.10 | ✓ | | ✓ | | Click on “Admin” tab from the top right corner menu. | |  |
| 5.11 | ✓ | | ✓ | | Click “Transport”. Under “Transport” select “Import Package”. | |  |
| 5.12 | ✓ | | ✓ | | Click on “Browse” next to “Choose package to import” and navigate to release package folder. | |  |
| 5.13 | ✓ | | ✓ | | Select Total\_ESI\_RACFAccount \_Disabled\_Report.zip ( The zip created in the previous step) and click on open. Provide the Business Justification. | |  |
| 5.14 | ✓ | | ✓ | | Click on “View Summary”. | |  |
| 5.15 | ✓ | | ✓ | | On the next page, click on “Request”. | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 5.16 | | ✓ | | ✓ | | Go to Admin 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select “Dashboard Configuration” |  |
| 5.17 | | ✓ | | ✓ | | To create new Dashboard, Click on “Action” button 🡪 Select “Create Dashboard”. |  |
| 5.18 | | ✓ | | ✓ | | On “Create New Dashboard” Page, Give the below details:   |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | Total ESI RACF Account Disabled Status | | 2 | Dashboard Type | ES PieChart | | 3 | Dashboard query | {  "analyticsConfig": "1662",  "fieldToGroup": "ESI RACF Action Status",  "filterMap": {  "ESI RACF Action Status":["Mailbox Hidden","FAILURE"]  }  } | | 4 | Chart Properties | Mention {} in this field whenever you update the dashboard configuration. | | 5 | Status | Active | | 6 | Local Query | {  "analyticsConfig": "1662",  "fieldToGroup": "ESI RACF Action Status",  "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 "  }]  } |   **Note :** For dashboard query, analyticsConfig key value is taken from the URL of that analytics. Follow the below steps to achieve the Key value.  Goto Applications icon on top right corner 🡪 Select “Intelligence” 🡪 Click on “Menu” (Three lines)option on top left corner 🡪 Select “Analytics Configuration List” 🡪 On search box, search “**Total ESI RACF Account Disabled Status Analytics**” analytics🡪 click on “**Total ESI RACF Account Disabled Status Analytics**”   1. On “Analytics Configuration Details” page, Check the URL for this analytics. Copy the key value from URL and use it for dashboard query. |  |
| 5.19 | | ✓ | | ✓ | | Click on Create. |  |
| 5.20 | | ✓ | | ✓ | | Go back to Home page, Goto “Admin” under application icon 🡪 Click on “Menu”(three lines) option on top left corner 🡪 Select “**Sav Roles**” 🡪 Select “**Role Admin**” from the role list 🡪 Navigate to “**Dashboard**” tab 🡪 Scroll down and check for “**Identity Repository - Admin**” 🡪  Click on “**Add Dashboard**”,Popup will appear 🡪 On Search bar, Search for Dashboard Name given 🡪 Click on “**Save**”. |  |
|  | |  | |  | |  |  |
| **Total Users Marked for deletion Dashboard** | | | | | | | |
| 1. Steps to export the Total Users Marked for deletion Report | | | | | | | |
| 6.0 | ✓ | | ✓ | | Login to 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 Users Marked For Deletion Status Analytics | | |  |
| 6.4 | ✓ | | ✓ | | Next, click on View Summary on the bottom right. | |  |
| 6.5 | ✓ | | ✓ | | Finally, validate the Reports you want to export and then click on Export. | |  |
| 6.6 | ✓ | | ✓ | | Once the zip file is downloaded 🡪 Rename the file to Total\_Users\_Deleted\_Report.zip and then unzip the file. | |  |
| 6.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present. Screenshot shown below: | |  |
| 1. Steps to import Reports.zip for Total Users Deletion | | | | | | | |
| 6.8 | ✓ | | ✓ | | Copy Total\_Users\_Deleted\_Report.zip( to the local machine from where QA/PROD Saviynt is accessible. | |  |
| 6.9 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 6.10 | ✓ | | ✓ | | Click on “Admin” tab from the top right corner menu. | |  |
| 6.11 | ✓ | | ✓ | | Click “Transport”. Under “Transport” select “Import Package”. | |  |
| 6.12 | ✓ | | ✓ | | Click on “Browse” next to “Choose package to import” and navigate to release package folder. | |  |
| 6.13 | ✓ | | ✓ | | Select Total\_Users\_Deleted\_Report.zip( The zip created in the previous step) and click on open. Provide the Business Justification. | |  |
| 6.14 | ✓ | | ✓ | | Click on “View Summary”. | |  |
| 6.15 | ✓ | | ✓ | | On the next page, click on “Request”. | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 6.16 | | ✓ | | ✓ | | Go to Admin 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select “Dashboard Configuration” |  |
| 6.17 | | ✓ | | ✓ | | To create new Dashboard, Click on “Action” button 🡪 Select “Create Dashboard”. |  |
| 6.18 | | ✓ | | ✓ | | On “Create New Dashboard” Page, Give the below details:   |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | Total Users Deletion Status Dashboard | | 2 | Dashboard Type | ES PieChart | | 3 | Dashboard query | {  "analyticsConfig": "1653",  "fieldToGroup": "Termination Action",  "filterMap": {  "Termination Action":["Users Deleted"]  } } | | 4 | Chart Properties | Mention {} in this field whenever you update the dashboard configuration. | | 5 | Status | Active | | 6 | Local Query | {  "analyticsConfig": "1653",  "fieldToGroup": "Termination Action",  "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 "  }]  } |   **Note :** For dashboard query, analyticsConfig key value is taken from the URL of that analytics. Follow the below steps to achieve the Key value.   1. Goto Applications icon on top right corner 🡪 Select “Intelligence” 🡪 Click on “Menu” (Three lines)option on top left corner 🡪 Select “Analytics Configuration List” 🡪 On search box, search “Total Users Marked For Deletion Status Analytics” analytics🡪 click on “Total Users Marked For Deletion Status Analytics” 2. On “Analytics Configuration Details” page, Check the URL for this analytics. Copy the key value from URL and use it for dashboard query. |  |
| 6.19 | | ✓ | | ✓ | | Click on Create. |  |
| 6.20 | | ✓ | | ✓ | | Go back to Home page, Goto “Admin” under application icon 🡪 Click on “Menu”(three lines) option on top left corner 🡪 Select “**Sav Roles**” 🡪 Select “**Role Admin**” from the role list 🡪 Navigate to “**Dashboard**” tab 🡪 Scroll down and check for “**Identity Repository - Admin**” 🡪  Click on “**Add Dashboard**”,Popup will appear 🡪 On Search bar, Search for Dashboard Name given 🡪 Click on “**Save**”. |  |
| **Total AD Account Deletion Status Dashboard** | | | | | | | |
| 1. Steps to export the Total AD Account Deletion Status Report | | | | | | | |
| 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 | Total AD Account Deletion Status Analytics | | |  |
| 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 | ✓ | | ✓ | | Once the zip file is downloaded 🡪 Rename the file to Total\_ADAccount\_ Deletion\_Report.zip and then unzip the file. | |  |
| 7.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present. Screenshot shown below: | |  |
| 1. Steps to import Reports.zip for Total AD Account Deletion Status | | | | | | | |
| 7.8 | ✓ | | ✓ | | Copy Total\_ADAccount\_ Deletion\_Report.zip ( to the local machine from where QA/PROD Saviynt is accessible. | |  |
| 7.9 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 7.10 | ✓ | | ✓ | | Click on “Admin” tab from the top right corner menu. | |  |
| 7.11 | ✓ | | ✓ | | Click “Transport”. Under “Transport” select “Import Package”. | |  |
| 7.12 | ✓ | | ✓ | | Click on “Browse” next to “Choose package to import” and navigate to release package folder. | |  |
| 7.13 | ✓ | | ✓ | | Select Total\_ADAccount\_ Deletion\_Report.zip ( The zip created in the previous step) and click on open. Provide the Business Justification. | |  |
| 7.14 | ✓ | | ✓ | | Click on “View Summary”. | |  |
| 7.15 | ✓ | | ✓ | | On the next page, click on “Request”. | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 7.16 | | ✓ | | ✓ | | Go to Admin 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select “Dashboard Configuration” |  |
| 7.17 | | ✓ | | ✓ | | To create new Dashboard, Click on “Action” button 🡪 Select “Create Dashboard”. |  |
| 7.18 | | ✓ | | ✓ | | On “Create New Dashboard” Page, Give the below details:   |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | Total AD Account Deletion Status Dashboard | | 2 | Dashboard Type | ES PieChart | | 3 | Dashboard query | {  "analyticsConfig": "1655",  "fieldToGroup": "AD Action Status",  "filterMap": {  "AD Action Status":["SUCCESS","FAILURE"]  }  } | | 4 | Chart Properties | Mention {} in this field whenever you update the dashboard configuration. | | 5 | Status | Active | | 6 | Local Query | {  "analyticsConfig": "1655",  "fieldToGroup": "AD Action Status",  "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 "  }]  } |   **Note :** For dashboard query, analyticsConfig key value is taken from the URL of that analytics. Follow the below steps to achieve the Key value.  Goto Applications icon on top right corner 🡪 Select “Intelligence” 🡪 Click on “Menu” (Three lines)option on top left corner 🡪 Select “Analytics Configuration List” 🡪 On search box, search “**Total AD Account Deletion Status Analytics**” analytics🡪 click on “**Total AD Account Deletion Status Analytics**”  On “Analytics Configuration Details” page, Check the URL for this analytics. Copy the key value from URL and use it for dashboard query. |  |
| 7.19 | | ✓ | | ✓ | | Click on Create. |  |
| 7.20 | | ✓ | | ✓ | | Go back to Home page, Goto “Admin” under application icon 🡪 Click on “Menu”(three lines) option on top left corner 🡪 Select “**Sav Roles**” 🡪 Select “**Role Admin**” from the role list 🡪 Navigate to “**Dashboard**” tab 🡪 Scroll down and check for “**Identity Repository - Admin**” 🡪  Click on “**Add Dashboard**”,Popup will appear 🡪 On Search bar, Search for Dashboard Name given 🡪 Click on “**Save**”. |  |
| **Total RACF Account Deleted Status Dashboard** | | | | | | | |
| 1. Steps to export the Total RACF Account Deleted Status Report | | | | | | | |
| 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 | Total RACF Account Deleted Status Analytics | | |  |
| 8.4 | ✓ | | ✓ | | Next, click on View Summary on the bottom right. | |  |
| 8.5 | ✓ | | ✓ | | Finally, validate the Reports you want to export and then click on Export. | |  |
| 8.6 | ✓ | | ✓ | | Once the zip file is downloaded 🡪 Rename the file to Total\_RACFAccount\_ Deletion\_Report.zip and then unzip the file. | |  |
| 8.7 | ✓ | | ✓ | | On unzipping the file, verify if there are 2 files present. Screenshot shown below: | |  |
| 1. Steps to import Reports.zip for Total RACF Account Deleted Status | | | | | | | |
| 8.8 | ✓ | | ✓ | | Copy Total\_RACFAccount\_ Deletion\_Report.zip ( to the local machine from where QA/PROD Saviynt is accessible. | |  |
| 8.9 | ✓ | | ✓ | | Login to Saviynt Security Manager (SSM) as administrator. | |  |
| 8.10 | ✓ | | ✓ | | Click on “Admin” tab from the top right corner menu. | |  |
| 8.11 | ✓ | | ✓ | | Click “Transport”. Under “Transport” select “Import Package”. | |  |
| 8.12 | ✓ | | ✓ | | Click on “Browse” next to “Choose package to import” and navigate to release package folder. | |  |
| 8.13 | ✓ | | ✓ | | Select Total\_RACFAccount\_ Deletion\_Report.zip ( The zip created in the previous step) and click on open. Provide the Business Justification. | |  |
| 8.14 | ✓ | | ✓ | | Click on “View Summary”. | |  |
| 8.15 | ✓ | | ✓ | | On the next page, click on “Request”. | |  |
| 1. Steps for Dashboard Configuration | | | | | | | |
| 8.16 | | ✓ | | ✓ | | Go to Admin 🡪 On top right corner, Goto Menu 🡪 Under Settings –> Select “Dashboard Configuration” |  |
| 8.17 | | ✓ | | ✓ | | To create new Dashboard, Click on “Action” button 🡪 Select “Create Dashboard”. |  |
| 8.18 | | ✓ | | ✓ | | On “Create New Dashboard” Page, Give the below details:   |  |  |  | | --- | --- | --- | | **Sr.no** | **Label Name** | **Value** | | 1 | Dashboard Name | Total RACF Account Deleted Status | | 2 | Dashboard Type | ES PieChart | | 3 | Dashboard query | {  "analyticsConfig": "1664",  "fieldToGroup": "Cigna RACF Action Status",  "filterMap": {  "Cigna RACF Action Status":["SUCCESS","FAILURE"]  }  } | | 4 | Chart Properties | Mention {} in this field whenever you update the dashboard configuration. | | 5 | Status | Active | | 6 | Local Query | {  "analyticsConfig": "1664",  "fieldToGroup": "Cigna RACF Action Status",  "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 "  }]  } |   **Note :** For dashboard query, analyticsConfig key value is taken from the URL of that analytics. Follow the below steps to achieve the Key value.  Goto Applications icon on top right corner 🡪 Select “Intelligence” 🡪 Click on “Menu” (Three lines)option on top left corner 🡪 Select “Analytics Configuration List” 🡪 On search box, search “**Total RACF Account Deleted Status Analytics**” analytics🡪 click on “**Total RACF Account Deleted Status Analytics**”  On “Analytics Configuration Details” page, Check the URL for this analytics. Copy the key value from URL and use it for dashboard query. |  |
| 8.19 | | ✓ | | ✓ | | Click on Create. |  |
| 8.20 | | ✓ | | ✓ | | Go back to Home page, Goto “Admin” under application icon 🡪 Click on “Menu”(three lines) option on top left corner 🡪 Select “**Sav Roles**” 🡪 Select “**Role Admin**” from the role list 🡪 Navigate to “**Dashboard**” tab 🡪 Scroll down and check for “**Identity Repository - Admin**” 🡪  Click on “**Add Dashboard**”,Popup will appear 🡪 On Search bar, Search for Dashboard Name given 🡪 Click on “**Save**”. |  |

# 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”. * On Search bar, Search for all Reports created on one by one. * [**Report Name List**: Total Users Disabled on Termination analytics, Total AD Account Disabled Status Analytics, Total Exchange Account Disabled Status Analytics, Total Cigna RACF Account Disabled Status Analytics, Total ESI RACF Account Disabled Status Analytics, Total Users Marked For Deletion Analytics, Total AD Account Deletion Status Analytics, Total RACF Account Deleted Status Analytics] * 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**: Total Users Disabled on Termination, Total AD Account Disabled Status Dashboard, Total Exchange Account Disabled Status Dashboard, Total Cigna RACF Account Disabled Status, Total ESI RACF Account Disabled Status, Total Users Deletion Status Dashboard, Total AD Account Deletion Status Dashboard, Total RACF Account Deleted Status].   * 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 ”**Total Users Disabled on Termination**” Dashboard 2. Check whether you are able to reflect the total count of users disabled in Saviynt on Piechart. 3. Check if Piechart reflects the data according to the selection of Timeframe given(7days/1Month/3months/1 Year). 4. After Clicking on Piechart, Check if you are navigated to details report. 5. Search for ” **Total AD Account Disabled Status Dashboard**” Dashboard 6. Check whether you are able to reflect the total AD account disabled with segregation of success and failure on Piechart. 7. Check if Piechart reflects the data according to the selection of Timeframe given(7days/1Month/3months/1 Year). 8. After Clicking on Piechart, Check if you are navigated to detailed report. 9. Search for ”**Total Exchange Account Disabled Status Dashboard**” Dashboard 10. Check whether you are able to reflect the total Exchange account disabled with segregation of mailbox Hidden and failure on Piechart. 11. Check if Piechart reflects the data according to the selection of Timeframe given(7days/1Month/3months/1 Year). 12. After Clicking on Piechart, Check if you are navigated to detailed report. 13. Search for ”**Total Cigna RACF Account Disabled Status Analytics**” Dashboard 14. Check whether you are able to reflect the total cigna RACF account disabled with segregation of mailbox Hidden and failure on Piechart. 15. Check if Piechart reflects the data according to the selection of Timeframe given(7days/1Month/3months/1 Year). 16. After Clicking on Piechart, Check if you are navigated to detailed report. 17. Search for ”**Total ESI RACF Account Disabled Status Analytics**” Dashboard 18. Check whether you are able to reflect the total cigna RACF account disabled with segregation of mailbox Hidden and failure on Piechart. 19. Check if Piechart reflects the data according to the selection of Timeframe given(7days/1Month/3months/1 Year). 20. After Clicking on Piechart, Check if you are navigated to detailed report. 21. Search for ” **Total Users Deletion Status Dashboard**” Dashboard 22. Check whether you are able to reflect the total count of users deleted on Piechart. 23. Check if Piechart reflects the data according to the selection of Timeframe given(7days/1Month/3months/1 Year). 24. After Clicking on Piechart, Check if you are navigated to detailed report. 25. Search for ” **Total AD Account Deletion Status Dashboard**” Dashboard 26. Check whether you are able to reflect the total count of users deleted on Piechart. 27. Check if Piechart reflects the data according to the selection of Timeframe given(7days/1Month/3months/1 Year). 28. After Clicking on Piechart, Check if you are navigated to detailed report. 29. Search for ”**Total RACF Account Deleted Status**” Dashboard 30. Check whether you are able to reflect the total RACF account deleted with segregation of success and failure on Piechart. 31. Check if Piechart reflects the data according to the selection of Timeframe given(7days/1Month/3months/1 Year). 32. After Clicking on Piechart, Check if you are navigated to detailed report. |  |

# 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 |  |