

# **Access Management**

## **Bizagi Studio**

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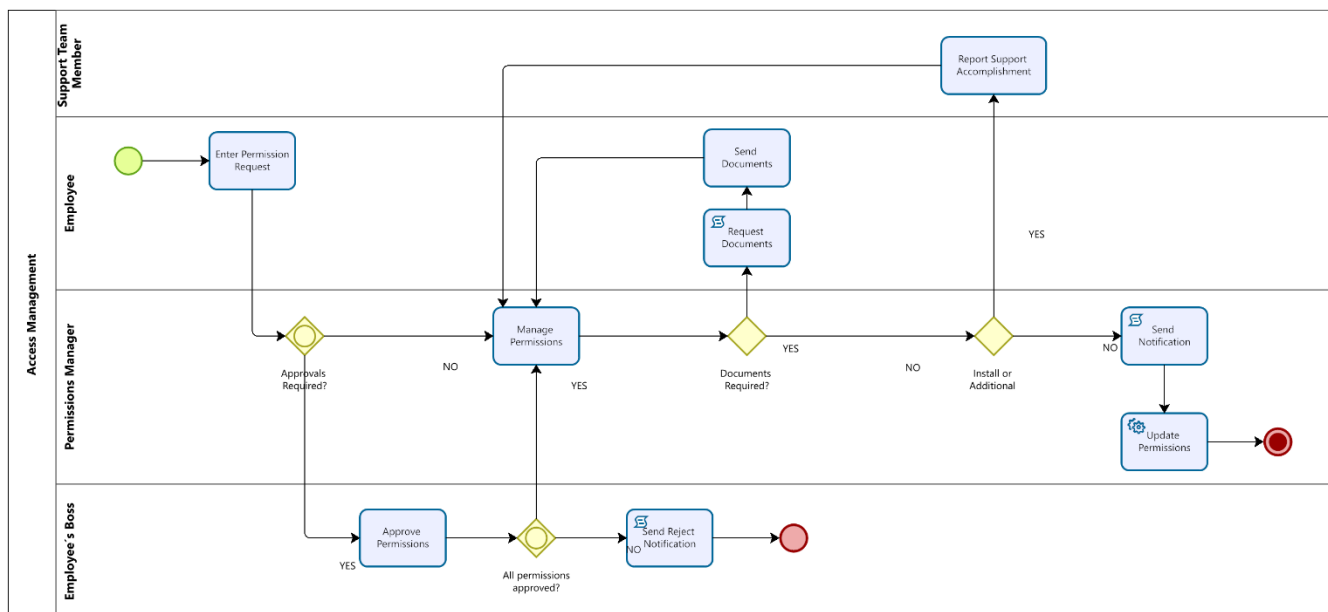
Your IT Department faces difficult challenges every day and providing an excellent service is not an easy task. The information in your company must flow easily throughout the organization in a quick and secure way. Thus, you must ensure its availability and have the necessary resources to access it.

The question is: how can your IT department know what information must be available to each user? And how can you control that every user has access only to the information that is strictly necessary? The answer is in adoption of the ITIL practices.

ITIL is a framework for the management of technological resources that is focused on ensuring customer satisfaction while achieving strategic goals through the definition of standards that allow control, operation, and management of them.

Bizagi's Access Management Process template is based on the principals of ITIL practices to help you guarantee the availability of information to the users that really need it. With this template it is possible to create requests for activating or deactivating permissions over applications, modules, folders, or services. It is also possible to manage approvals, enable a complete control of the activities that must be carried out in each request and update the list of user's active permissions. In addition, you will be able to control the user's access through easy communication between the Permissions management, Human Resources, and Information Security Management areas. This way you can not only attend requests faster but also create a communication channel to warrant the confidentiality and security of the information.

# Access Management



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Bizagi  
Modeler

## Definitions

### Role

Conduct or role carried out by a person in the organization. In Bizagi, a user can have one or more roles.

### Profile

In this process template a Profile is a group of related permissions. A role can have one or more profiles.

### Permission

In this process template Permission refers to documents, folders, applications and/or services of the Service Catalog with manageable access.

### Module

Sub-classification of an applicative, folder and/ or service.

### Privilege

Level of authorization that a user has over a document, folder, applicative and/or service of the Service Catalog.

## Description

The process starts with a request of activation or deactivation of the permissions for an employee. Once the general information of the request and the list of required actions for each permission have been entered, the process requests approvals by the user's Boss if necessary. Then, the Permissions Manager reviews the request and executes the required actions. It is possible that additional actions are needed to complete the request, like on-site installations; if so, they are requested. When all actions have been executed, the list of user's active permissions are updated, and a notification is sent to the employee with the permissions summary. Finally, the case is closed.

# Process Elements

## Enter Permission Request

### Description

In this activity the user enters the information of the request and the actions required for each permission. A request can be opened for several reasons by different areas:

- By the Human Resources Department to request the activation of the permissions related to the position of a new employee or
- To Request the deactivation of permissions for people who are no longer employed
- By an employee who requires special permissions for the development of his/her job
- By a user of the Information Security Management area to report forbidden Access of an employee.

When a user is selected, all his/her active permissions are loaded, the following reasons for the request can be selected:

- "New Hire": According to the user's roles, the related profiles of these roles are loaded to suggest the permissions that should be activated. The user can select the permissions to add and the level of authorization for each one.
- "Resignation/Dismissal": The option "Remove Access Rights" is automatically selected to each user's active permission.
- "Job requirements": The user can add profiles that will load the related applications to the request or add individual permissions.
- "Report Forbidden Access": The user can choose the permissions that must be removed. In many cases, those permissions are not in the user's active permissions.

It is necessary to parameterize some entities for this template to work correctly. To parameterize we recommend following this order: Permissions, Modules, Privileges, Profiles, Profiles-Permissions, and Roles-Profiles. For more information about how this parameterization can be performed please review the Construction Document.

### Performers

Employee

### Forms

**Name:** Enter Request Form

**Description:** This form is used to enter the information of the request

**Prototype:**



Access Management > Enter Permission Request

Information of the Request

Reasons:

Report Forbidden Access

Description:

Attachments:

No files uploaded

Employee's Information

Employee:

Smith

contactCell:

Identification Number:

234

Area:

Invoicing

contactEmail:

RH@bizagi.com

Employee's Permissions

Active Permissions

Permission	Modules	Privileges	RequestedAction
ERP	Financial Management	Read	
CRM	Purchases	Read	
Payroll database	N/A	Read	

## Actions

Type	Description
On enter	Get parameter values: Stores the values of the parameter tables "Profiles", "Role-Profile" and "Profile-Permission" in master tables.
On save	<p>Fill Profile-Permissions: Gets the permissions related to each Profile and stores them in the table "Related Permissions" of the table "Profiles of the Request"</p> <p>Load Suggested Profiles: Gets the profiles related to the employee's roles and stores them in the table "Requested Profiles"</p> <p>Update Permissions: Fills the table "Active Permissions" with the permissions related to the Profiles entered in the table "Requested Profiles"</p> <p>Delete Permissions: This rule deletes the records of permissions that are not related to the requested profiles.</p> <p>Logic: According to the selected value of the "Reasons" attribute, the requested action for each permission is set.</p>
On exit	<p>Get Permissions of the Request: Fills the table "Requested Permissions" with the permissions for which any action has been requested.</p> <p>Remove non-active permissions: Removes the record of the non-active permissions from the "Active Permissions" table.</p>

## Approvals required?

### Description

This Gateway evaluates the condition related to the necessary approvals of the requested permissions. Approvals are required only if special permissions that are not included in the standard permissions related to the user's roles are requested.

### Conditions

- YES: The process continues to the "Approve Permissions" activity
- NO: The process continues to the "Manage Permissions" activity

## Approve Permissions

### Description

In this activity the employee's Boss verifies the employee information and decides if the special permissions are approved or rejected

### Performers

Employee's Boss

### Allocations

#### Condition

This activity must be performed by the Boss of the user for whom the permissions are requested

#### Description

The activity is assigned to the person registered as Boss of the user for whom the permissions are requested.

### Forms

Name: Approval Form

Description: This form is used to approve or reject the requested permissions

Prototype:

The screenshot shows a web application interface for 'Access Management > Approve Permissions'. The form is divided into several sections:

- Employee's Information:** Contains fields for Name, Identification Number, contactCell, contactEmail, areaName, Reasons, Description, and Attachments.
- Employee's Active Permissions:** A message states 'The user does not have active permissions'.
- Permissions to Approve:** A table titled 'Permissions of the Request' with columns: Permission, Modules, Privileges, Action to Execute, Approved, and Approval Comments. The 'Approved' column has radio buttons for 'Yes' and 'No'. A '+' icon is at the bottom left of the table.

## Actions

Type	Description
On save	Update permissions status: This rule updates the status of the permissions for which approvals was required. The status changes to "Approved" or "Rejected" according to the decision of the Boss

## All permissions approved?

### Description

This inclusive Gateway evaluates if the employee's Boss approved all the permissions that were requested.

### Conditions

- All permissions approved: The process continues to the "Manage Permissions" activity
- No permissions approved: If all the permissions that required approval were rejected, a notification is sent to the employee to inform him/her of the rejection.
- Some permissions rejected: If some permissions were rejected, a notification is sent to the employee and the process continues to the "Manage Permissions" activity

## Send Notification of Rejection

### Description

A notification is sent to the employee to inform him/her of the rejection of one or more permissions by his/her Boss.

### Script

Dear <Employee>

We regret to inform you that your Boss/Manager/Supervisor has rejected the activation of the following permissions:

<Employee Permissions Table [Approved=false]>

Thank you for your comprehension.

Yours sincerely

Permission Management

## Actions

Type	Description
On exit	Create E-mail: Rule to generate the e-mail that is going to be sent to the Employee.

## Manage Permissions

### Description

The Permissions Manager reviews the request and performs the necessary actions for each requested permission. For each one, the following options can be chosen:

- Request Installation or additional Support: This option is used to send the request to the Support Department for activating, deactivating or changing the privileges of permissions that are cannot be managed directly by the Permissions Manager.
- Reject: If for any reason the activation, deactivation or change of privileges of a permission was not possible, the action over the permission must be marked as rejected.
- Mark as ready: Once the requested action over a permission has been executed it must be marked as ready.

It is important to note that the process will not be able to continue if all the requested permissions are not marked as ready or rejected. The permissions marked as ready will update the list of user´s active permissions in Bizagi with the addition, removal or changing of privileges while the permissions marked as rejected will not change anything in that list.

### Performers

Permissions Manager

### Allocations

Condition	Description
This activity must be performed by the Permissions Manager	The activity is assigned to the person with the Role of Permissions Manager

### Forms

**Name:** Manage Permissions Form

**Description:** This form is used to select the necessary actions to activate, deactivate or change the privileges of the permissions of the request

**Prototype:**

## Information of the Request

Reasons:

Description:

Attachments:

## Employee's Information

Name:

Identification Number:

contactCell:

contactEmail:

areaName:

## Requester's Information

fullName:

idUser:

contactCell:

contactEmail:

areaName:

## Employee's Active Permissions

## Active Permissions

Permission	Modules	Privileges

## Permissions to Manage

## Permissions of the Request

Permission	Modules	Privileges	Action to Execute	Status	Options
		Read	Remove Access Rights		
		Read	Remove Access Rights		
		Read	Remove Access Rights		

+ ✎ 🔗

Request Documents:



Yes



No

## Actions

### Type

### Description

On exit

Define path to follow: This rule updates the status of each permission of the request according to the chosen options in this activity and evaluates if it is necessary to request installation or additional support.

Validation of accomplishment: This rule is used to evaluate if all the requested actions over the permissions were accomplished or not.

## Documents Required

## Description

This gateway evaluates if it is necessary to request documents from the employee.

## Conditions

- **YES:** The necessary documents are requested.
- **NO:** The process continues to the "Installation or additional support required?" Gateway.

## Request Documents

### Description

A notification is sent to the employee to ask for necessary documents to manage the request.

### Script

Dear <Employee>

We have analyzed your request <Case Number> and we require the following information in order to continue:

<Requested Documents>

Yours sincerely

Permissions Management

### Actions

Type	Description
On save	Create E-mail: Rule to generate the e-mail that is going to be sent to the Employee.

## Send Documents

### Descriptions

In this activity the employee enters the documents requested by the Permissions Manager.

### Performers

Employee

### Allocations

Condition	Description
This activity must be performed by the person who opened the case.	The activity is assigned to the person who opened the case through the expression "Case Creator"

### Forms

Name: Send Documents Form

Description: This form is used to enter the requested documents

Prototype:

Access Management > Send Documents

Information of the Request

Reasons:  
Description:  
Attachments:

Permissions of the Request

Permission	Modules	Privileges	Action to Execute

Required Documents

Documents:  
Documents Attachment:  
Documents Response:  
Response Attachments:

No files uploaded

No files uploaded

## Installation or Additional Support Required?

### Description

This Gateway evaluates if installation or additional support is required in the activity “Manage Permissions”

### Conditions

- YES: The process continues to the “Record Support Accomplishment” activity
- NO: The process continues to the “Update Permissions” activity

### Actions

Type	Description
On save	Disable Support Flag: This rule initializes the Boolean attribute “Request Support”

## Report Support Accomplishment

### Description

The person of the support team in charge of the requested permissions management, registers that the task has been performed.

### Performers

Support Team Member

### Allocations

Condition	Description
This activity must be performed by a member of the support team.	The activity is assigned by load to any person with the role “Support Team Member”

## Forms

**Name:** Report Support Form

**Description:** This form is used to report the accomplishment of the support over the requested permissions.

**Prototype:**

Access Management > Report Support Accomplishment

**Information of the Request**

Reasons:

Description:

Attachments:

**Employee's Information**

Name: Identification Number:

contactCell: contactEmail:

areaName:

**Permissions to Manage**

**Permissions of the Request**

Permission	Modules	Privileges	Action to Execute	Support Ready	Support Comments
				<input type="radio"/> Yes <input type="radio"/> No	

+ [icon]

## Actions

Type	Description
On save	Disable Support Flag: This rule initializes the Boolean attribute "Request Support"

### Send Notification

#### Description

A notification is sent to the employee to inform him/her of the execution of the actions over the requested permissions.

#### Script

Dear <Employee>

Below you find the summary of the actions performed over the permissions of your request:  
<Permissions of the Request Table>

Yours sincerely

Permissions Management



## Actions

Type	Description
On exit	Create E-mail: Rule to generate the e-mail that is going to be sent to the Employee.

## Update Permissions

### Description

In this activity the list of user's active permissions are updated in Bizagi.

## Actions

Type	Description
On exit	Add permissions: Rule to add or update the active permissions in the "Active Permissions" table  Remove permissions: Rule to delete the deactivated permissions from the "Active Permissions" table

# Performers

## Employee (Entity)

Person who opens the case

## Employee's Boss (Entity)

Person who approves the special permissions of a specific employee

## Permissions Manager (Role)

Person who manages the activation, deactivation or change of privileges of a permission

## Support Team Member (Role)

Person in charge of additional management for the activation, deactivation or change of privileges of permissions.