Data Access Request Orchestration

Set Up and User Guide

Create. Innovate. Educate.

Introduction

* Salesforce Labs provides free, open source solutions to the AppExchange.

Approve and track of Data Access Requests for system integrations and reporting. Salesforce System Administrators can coordinate with data stewards to ensure that Data Access Requests meet requirements based on the Data Sensitivity Level set on fields in Salesforce. If you aren't using Business Owner and Data Sensitivity on fields, this application offers a basic approval and access tracking process.

Data Access Request Orchestration combines Flow Orchestration with Flow Templates you can update to meet your specific business needs.

This application is primarily for tracking information related to Data Access Request forms. For more complex data compliance needs, please consider other AppExchange solutions as well.

System requirements:
Available for use in Enterprise, Unlimited, Force.com, Developer, and Performance Editions of Salesforce.

This application makes use of Data Sensitivity Levels and Business Owners but does not require them.

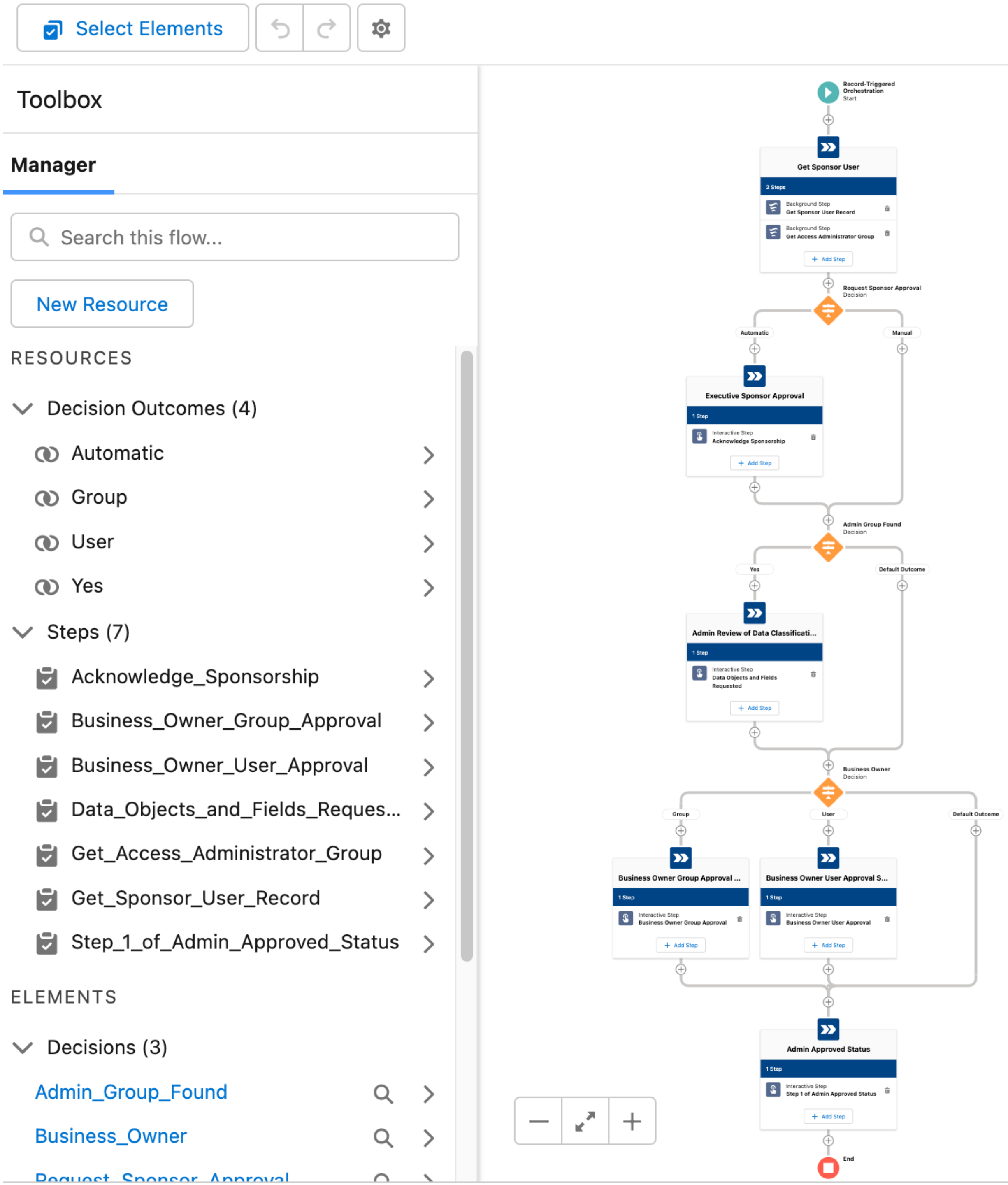
Installation Guide

Login with your trailhead email and navigate to our listing on Appexchange.

Select “Get it Now” from the listing and select the org you want to install it in from the drop down

1. Agree to the terms and conditions
2. **Select “Get it Now” from the listing and select the org you want to install it in from the drop down**
3. Agree to the terms and conditions
4. Once you have redirected to the Salesforce login page, input the credentials for the Salesforce org you wish to install the solution in
5. Select the profiles you wish to access the solutions (Admins Only, Everyone, or Specific Profile)
    a. Make the Data Access Request Object available to anyone you expect will be submitting Data Access Request forms. These users will also need to create and edit records in the package’s Data Access Request custom object and should be able to view records they create.
    b. System Administrators and data managers will need access to run flows and to view the records created by others to track Data Access Request information.
    c. Anyone who might be listed as an Executive Sponsor should be able to view and update records created by others and listing them as sponsor.

Set Up Guide



With a multistep Orchestration, users across different teams review and approve records.

Once you have successfully installed Data Access Request Orchestration, please complete the following steps:

1. Enter a valid email address for the Automated Process User on the Process Automation Settings page in Setup.
    a. The Orchestration notifies Users and Groups via email when a step in the Orchestration is assigned to them.

2. Assign the packaged Permission Set to Users who will be accessing the Data Access Request form and records.
    a. Users who need to submit Data Access Request forms
    b. System Administrators
    c. Data Managers/Business Owners
3. Make sure users also have “Run Flows” Permission.
4. Set up Public Groups for administrators and data managers. The Application requires a “System Administrators“ group that you can set to include any admin users who fulfill Data Access Requests once approved.
5. Establish OWD for the Data Access Request custom Object.
    a. Consider the levels of privacy vs transparency needed for data access requests and their status.
    b. Apply the appropriate Object Wide Defaults for data sharing for your business needs
    c. Create Public Groups (if you haven’t yet) for data managers who share responsibility for Fields of a given Object
    d. Extend sharing to ensure data visibility and edit access for System Administrators and data managers
    e. Extend sharing to ensure data visibility and edit access for a record’s Executive Sponsor
6. Add the Data Access Request tab to an app for your users if you choose. There is no specific application in this package. Alternatively, you might want to create a custom Flow to support your business processes for requesting access to data by requiring just the fields you need and offering guidance for users to submit the data correctly. Such a flow could easily be added to a user’s Home page. Or is could be added as an Action called from Tableau or Slack as well.
7. Customize the Data Access Request Page Layouts to meet your needs.
    a. Orchestrations are triggered by new Data Access Request records. Users can access the page or you can provide a link to customized Flow that you design to create and validate data according to your business needs

Business Process Steps

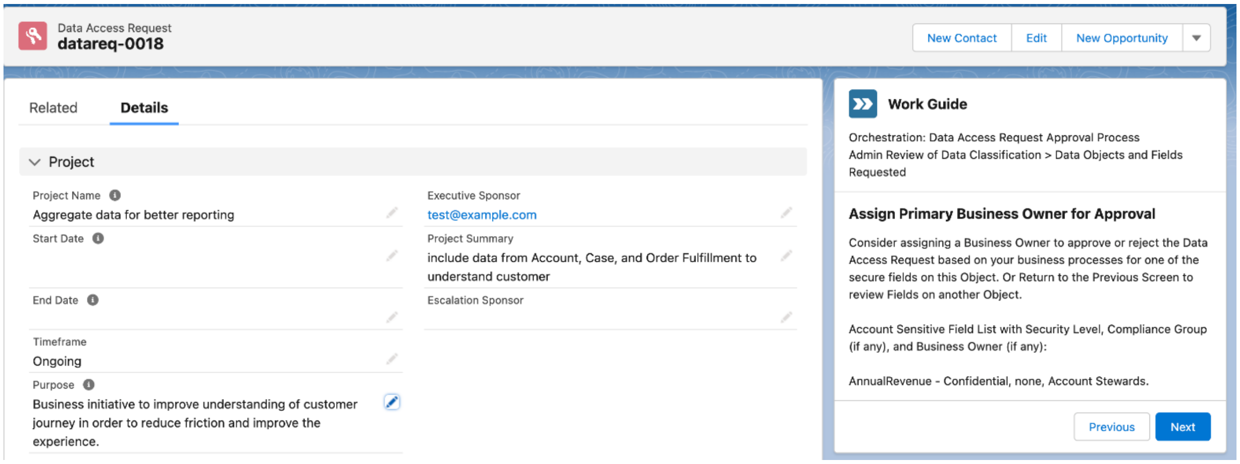
Users who want new access to Salesforce Data can fill out a request form, available on the Data Access Request Tab or via a customized Flow you create.

- The record status must be set to “**Submitted**” for the approval Orchestration to run.
- The Executive Sponsor field should have a valid email address if the request is sponsored. The Orchestration will look for a matching username to get acknowledgement from the sponsor if they are a Salesforce user as well. If they are not a Salesforce user, an email can be sent manually for them to acknowledge the request.
    - The pre-built flow requires a valid Salesforce Username in this field, for a user with matching username and password, but you can modify Flow Templates to meet your business process.

The Orchestration also looks for the “System_Administrators” Public Group you created during the configuration steps. This group is used to route the request to System Administrators who may need to fulfill the request after its approval.

When the Executive Sponsor on the access request record is a Salesforce user, they receive an email with a link to the request record in Salesforce. The Data Access Request record page has guidance specifically for the sponsor to acknowledge that they are sponsoring the project and the data access request.

Following acknowledgement from the executive sponsor, the System Administrators group can review the data classification settings on Objects and Fields in Salesforce for the data that the user has requested. Any Fields with a Sensitivity Level are displayed on Objects the administrator reviews. Administrators complete this review step right from the Data Access Request record page thanks to guidance from the Orchestration. And, yes, the administrators receive an email notification to encourage them to complete this step as well.



The Work Guide for administrators indicates sensitive fields like this one owned by the Account Stewards Public Group.

If the administrators choose, they can assign a Business Owner to the Data Access Request record as well. This owner is automatically determined based on a selected sensitive field, as long as that field has a Business Owner User or Group associated.

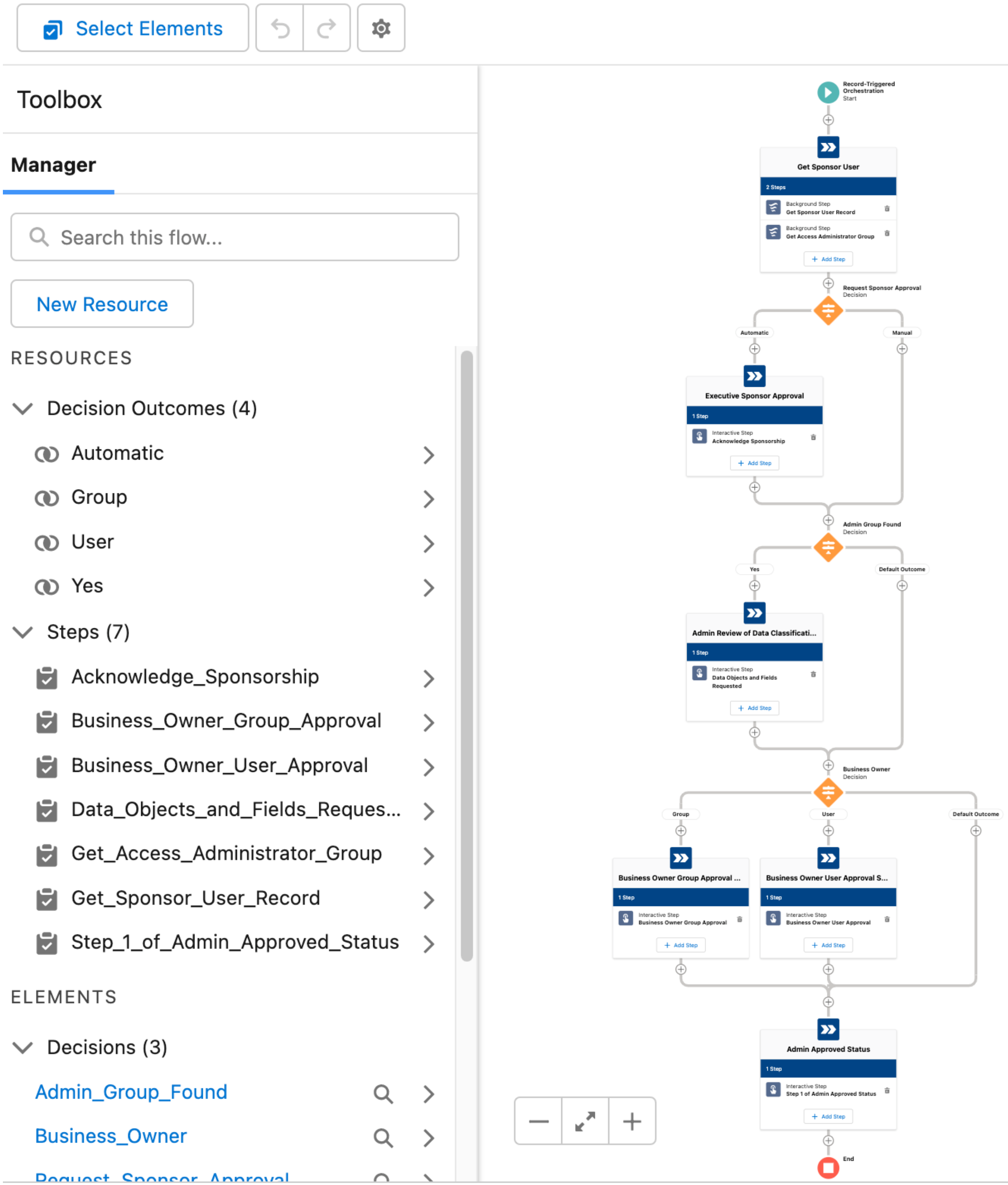
The Orchestration notifies this Business Owner next. They can approve the request and communicate any policies and procedures related to sensitive data the user has requested.

The final stage in the orchestration goes back to the administrators to review the now updated record and give a final approval before carrying out any steps to make the requested data available.

Flow Template Customization Guide

The Data Access Request Orchestration relies on Flows we have packaged as Templates. Edit these to meet your specific needs and associate them with a new custom Orchestration that suites your business processes. The following templates are available for customization:

1. **Flow Template "Get Sponsor By UserName"** gets the Executive Sponsor User for assigning requests to the user based on email address
2. **Flow Template "Get Access Administrators Group"** gets the "System Administrators" Public Group for assigning request records to administrators
3. **Flow Template "Acknowledge Sponsorship"** leadership acknowledges their participation in the access request
4. **Flow Template "Assign Primary Business Owner for Approval"** administrators review the data classification settings on various objects and fields to find a business owner
5. **Flow Template "Business Owner Acceptance"** business owner approves or rejects access to data they manage
6. **Flow Template "Mark Approved"** administrators (and not just Mark) review the request and actions from other approvers and indicate final approval



Use the Orchestration pictured as an example of the type of Orchestration you can build with customized Templates.

Once you are satisfied with your configurations, click Save and Activate to enable your Flows.