



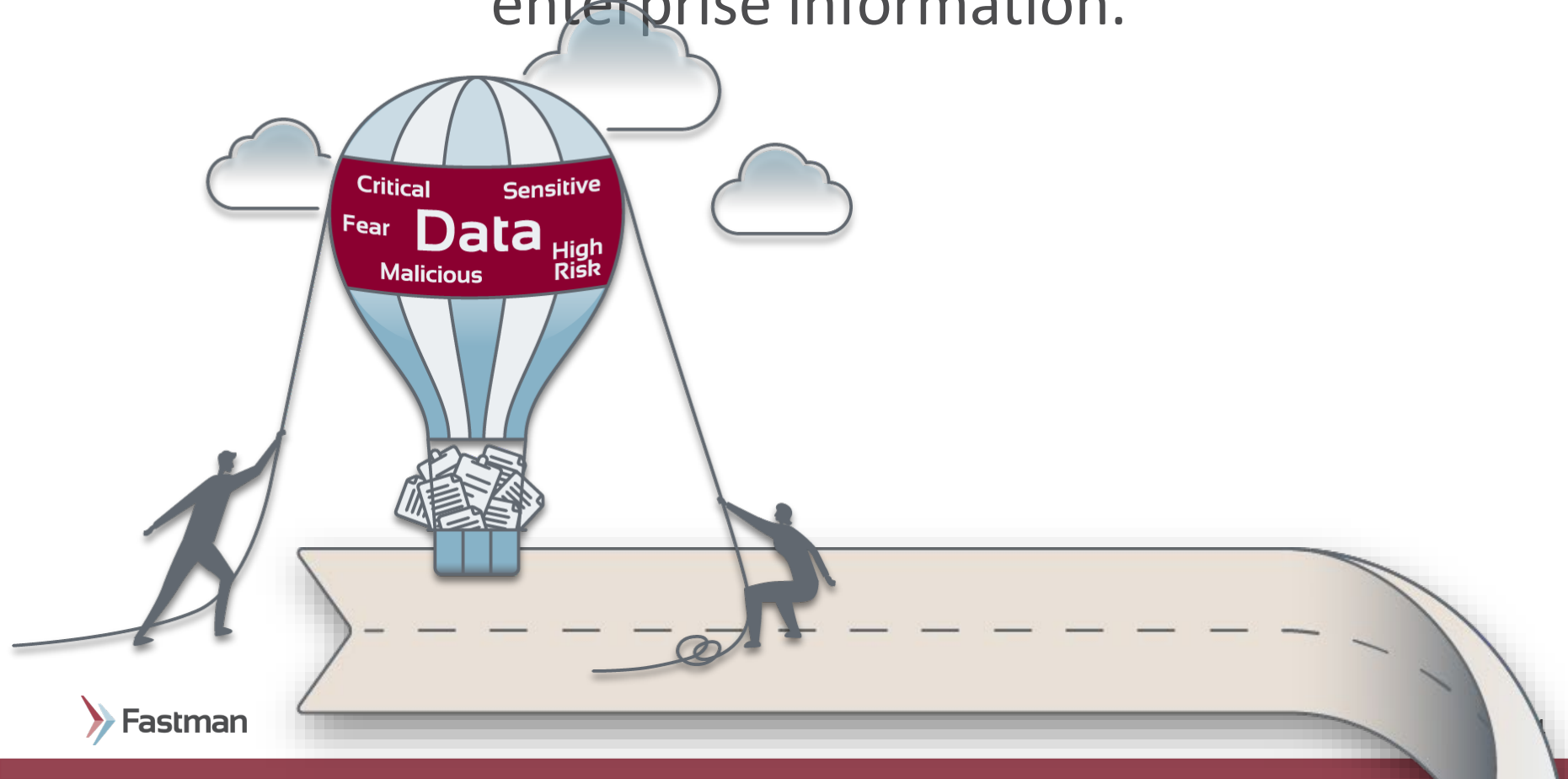
# Information Integrity in the Cloud Part II – Permissions and Access Control

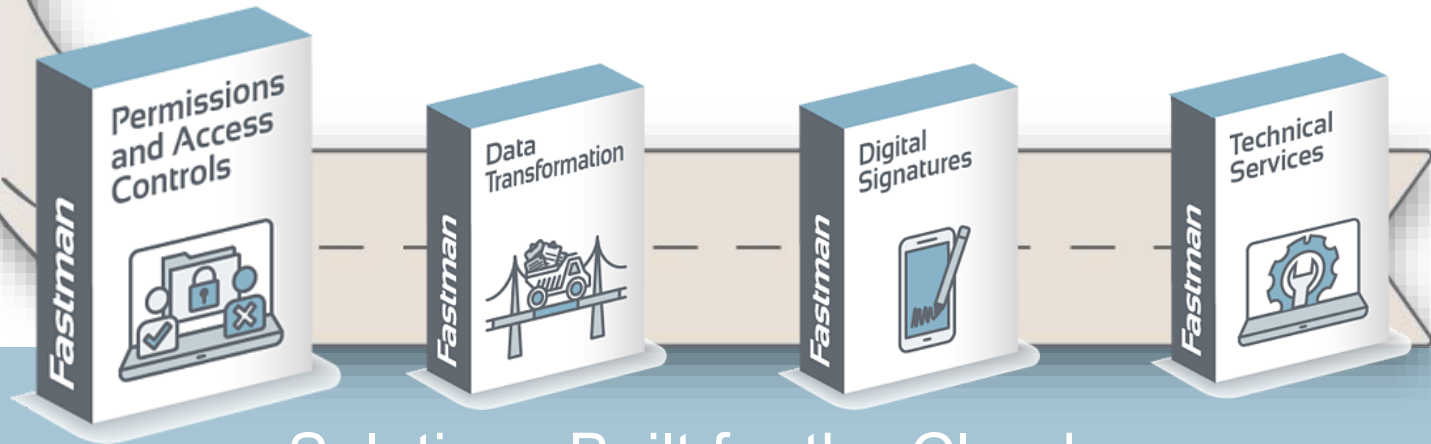
April 26<sup>th</sup>, 2022

Alister Grigg – Managing Director

David Henshaw – VP Products

**Fastman** ensures the **security** and **integrity** of your enterprise information.





## Solutions Built for the Cloud

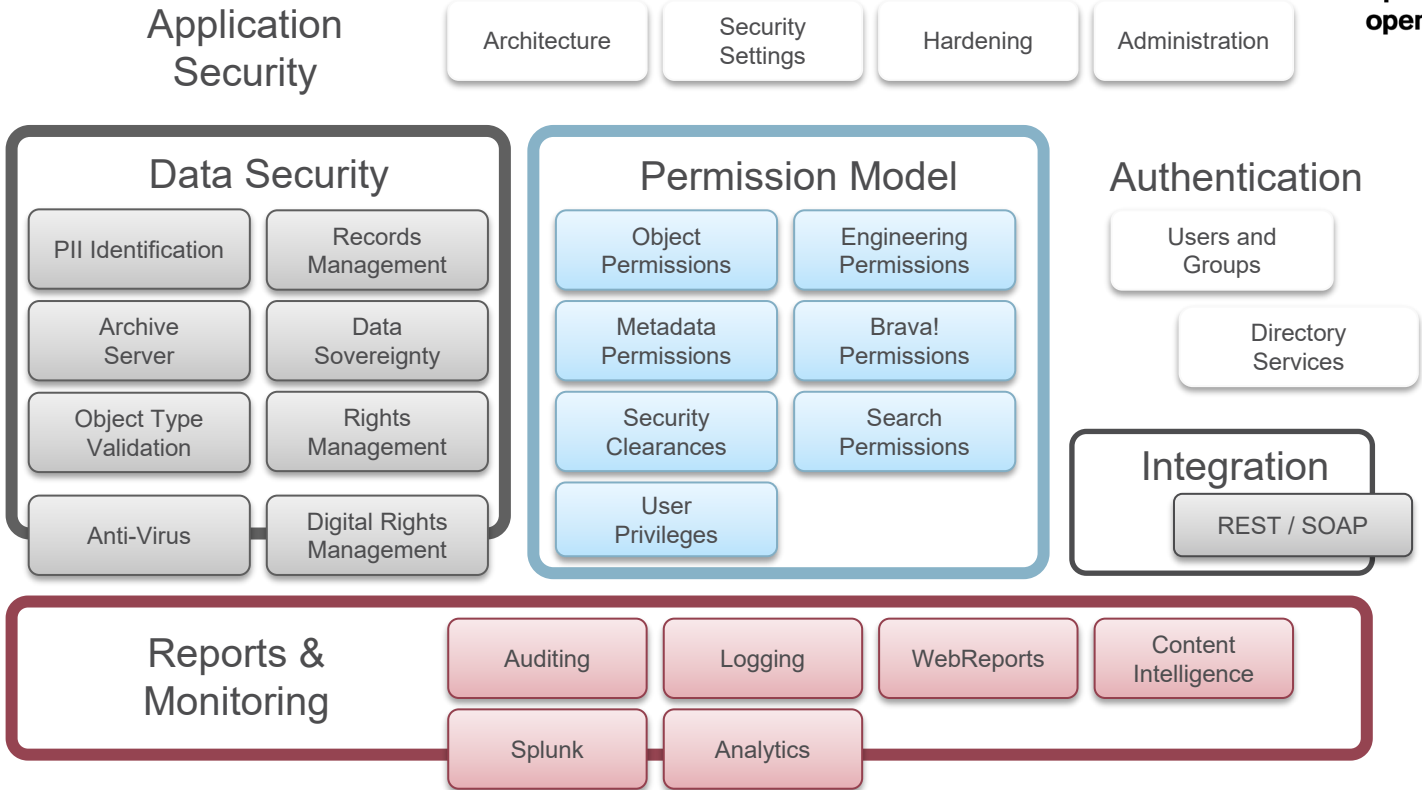
# Managing Information Access is Challenging

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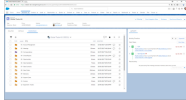


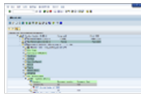


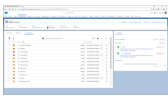







- **Customers want:**
  - A simple way to manage their organisation's access controls
  - To minimise the risk of information security breaches.
  - Structured processes and comprehensive tools
  - Comfort that any breaches can be quickly and reliably rectified
- **Customers deserve from day one**
  - Tools to safely and efficiently ensure the security of their information.
  - To trust their information and use it with confidence knowing that its security is readily, and cost effectively managed.

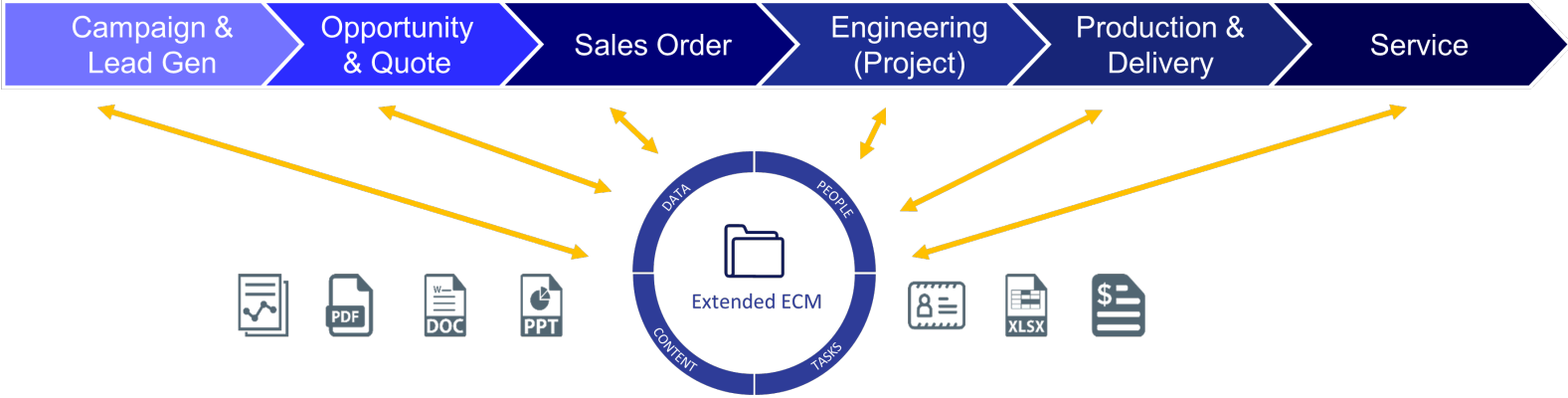
# Security and Permissions in OTCS is complex!

opentext<sup>™</sup> | Content Suite  
opentext<sup>™</sup> | Extended ECM

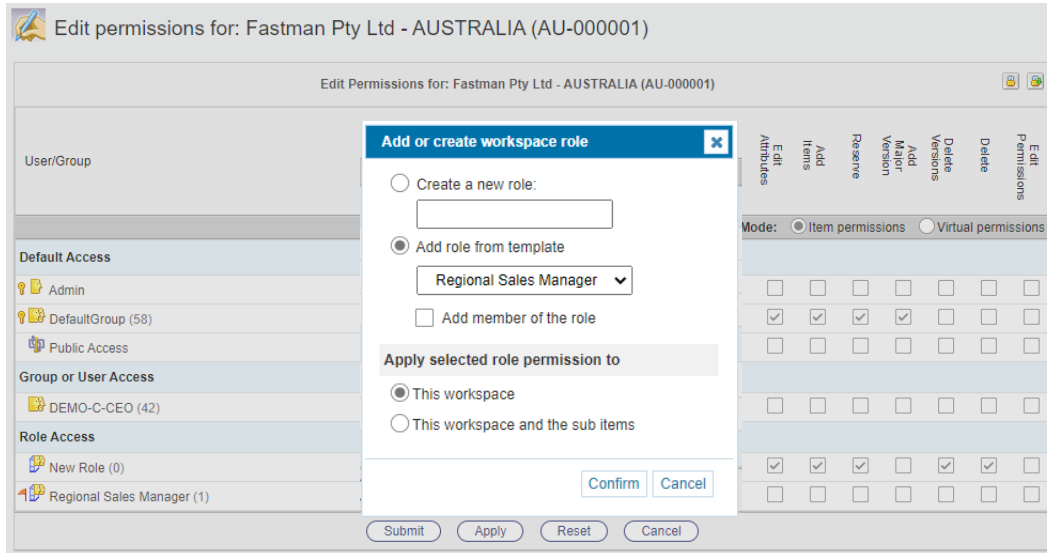


# And is becoming more complex!

 Account Executive	 Legal	 Assistant	 Finance	 Customer Support	 Production	 Service
						
						 SAP Cloud for Customer



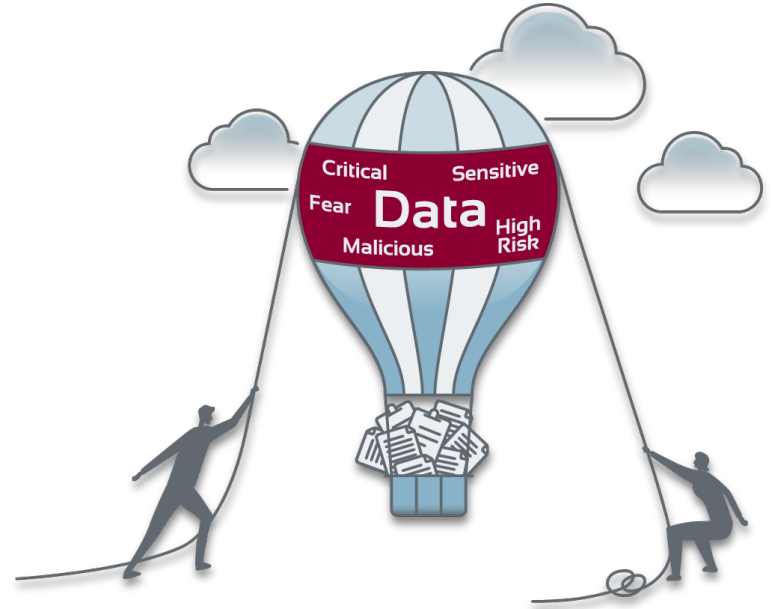
# With Roles, Access Gets more complicated, not less



- Role Based Permissions
  - Central to Workspace model
  - Works alongside ‘classic’ permissions
  - Has it’s own considerations
  - Permissions Manager increasingly relevant

# Cloud Also Adds Complexity

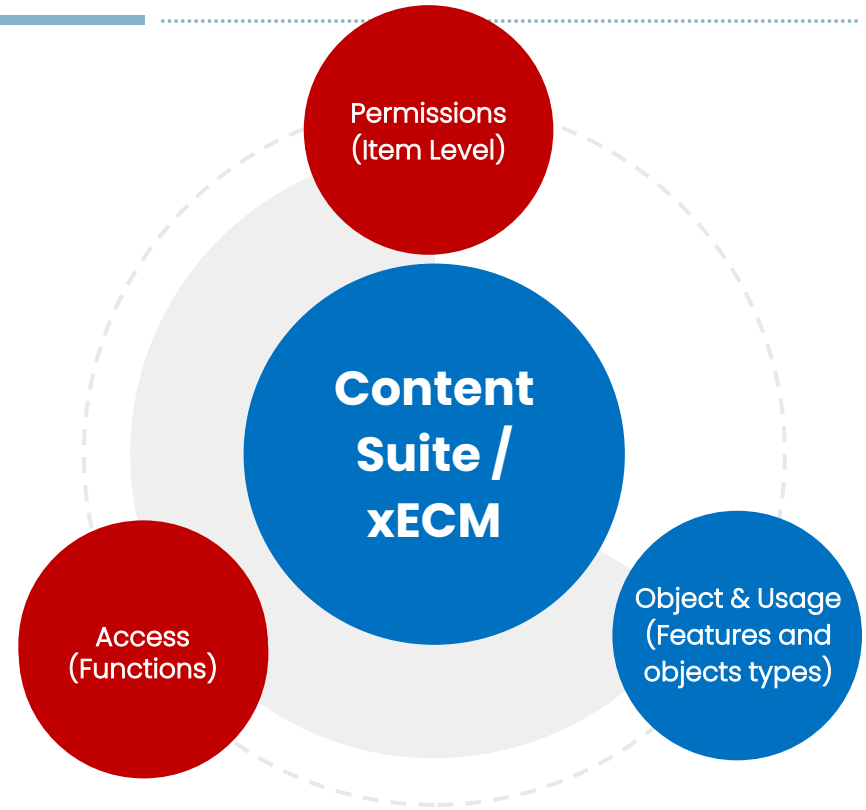
- Multiple service providers
  - Restricted access to admin rights
- Commercial considerations
  - Service Desk call volumes
  - Project vs. BAU
  - Included in Service Agreements or not
- Technical considerations
  - Containerized vs. 'VM'
  - Upgrades and version compatibility





# Simplifying the Problem - The Triangle of Trust

- Permissions & Roles
  - What a user, group, or role can do at the (specific) **item level**
- Access
  - What **functions** a user or group can execute regardless of data or feature
- Object and Usage Privileges
  - What system **features** a user can use, or what object **types** they can create



# A Few Examples

- Functional restrictions against specific objects / data items based on user location, object attributes and classification, etc.
- Category removal available to users with update attributes permissions
- Use of groups to manage access to features and content



User/Group	File Contents Size	File Name	Modify	Attributes	File Name	File Name Permissions	Update File Name Permissions	Delete File Name	File Name Permissions	SC	SM	Actions
Mode: <input type="radio"/> Item permissions <input type="radio"/> Virtual permissions												
<input type="checkbox"/> Admin	✓	✓	✓	✓	✓	✓	✓	✓	✓			Edit Permissions
<input type="checkbox"/> DefaultGroup (14)	✓	✓	✓	✓	✓	✓	✓	✓	✓			
<input type="checkbox"/> All Public AccessP												
<input type="checkbox"/> DEMO-C-LEG-M-LAWYERS(LAW) (23)	✓	✓	✓	✓	✓	✓	✓	✓	✓			
<input type="checkbox"/> DEMO-C-LEG-M-USERS(U) (1)	✓	✓	✓	✓	✓	✓	✓	✓	✓			
<input type="checkbox"/> DEMO-C-LEG-MANAGER(M) (1)	✓	✓	✓	✓	✓	✓	✓	✓	✓			

Corporate Secretary

Permissions Overview for: Corporate Secretary

Copy Permissions Rollback Permissions Copy Replace Permissions Filter DEMO-C-GM-GMCS-M-ED Show Effective Permissions Apply Clear Show columns: Both

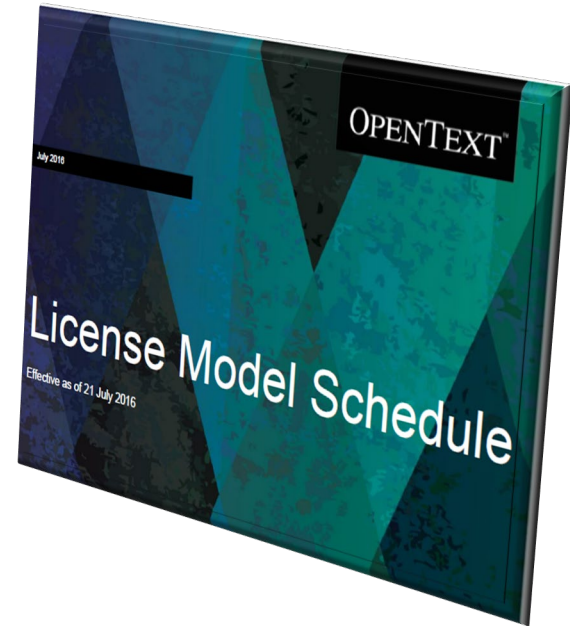
Name	User/Group	File Contents Size	Modify	Attributes	File Name Permissions	Update File Name Permissions	Delete File Name	File Name Permissions	SC	SM	Actions
Mode: <input type="radio"/> Item permissions <input type="radio"/> Virtual permissions											
<input type="checkbox"/> Board	DEMO-C-GM-GMCS-M-EDU-USERS(U) (21)	✓	✓	✓	✓	✓	✓	✓			Edit Permissions
	DEMO-C-GM-GMCS-M-EDU-USERS(U)										Edit Permissions Run Report

DEMO-C-GM-GMCS-M-EDU-USERS(U)

# The Limited Use License Dilemma

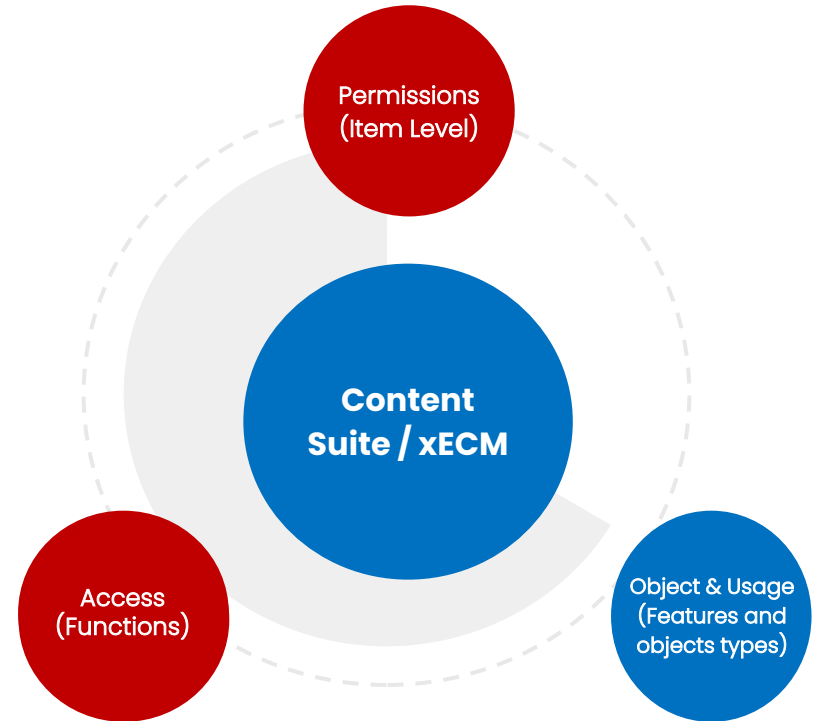
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- Understand your EULA
  - Multiple license types available
- Restricted based on functional access, not permissions
- Do you really want to be constantly modifying permissions and constantly checking?
  - e.g. implications of public access



# Permissions Manager – *Item Level Control*

- **Dashboard view** of access lets you make changes with confidence + the ability 'Rollback'
- Alleviate need for **ad-hoc reporting** and development
- Eases the frustration when you don't have **System Administrator** access
- Streamline **user onboarding** and granting access with the '**Compare Groups**' functionality
- Ensure **security model is compliant** with organizational policy
- Support for **containerized** deployments
- Advanced support for working with **Roles on Business Workspaces**



# Permissions Manager Focus

## Scenario: Improving the end user experience

The screenshot displays the Fastman Permissions Manager interface. At the top, there's a 'Permissions Overview' section for 'Perms Test'. A red box highlights the 'Rollback Permissions' button. Below this is a table with columns for Name, User/Group, and various permission actions (See, See Contents, Modify, Edit Attributes, Add Items, Reserve, Delete Versions, Delete). A red box highlights a row for 'Statement\_12\_12\_2021.pdf' with a '40 ... MEDIUM CABINET/FMB' security clearance. To the right, a red box highlights the 'Search Permissions & Replace User' button. Below the table is a 'Permissions' sidebar and an 'Edit Group Permissions' dialog for 'INF - Corporate Information Management - End Users'.

Name	User/Group	See	See Contents	Modify	Edit Attributes	Add Items	Reserve	Delete Versions	Delete	Permissions	Actions
Perms Test	Patrick Bisallion, DefaultGroup (8), <No Public Access>, INF - Corporate Information Management - End Users (1)	✓	✓	✓	✓	✓	✓	✓	✓	20 ... LOW	Edit Permissions
Statement_12_12_2021.pdf	Patrick Bisallion, DefaultGroup (8), <No Public Access>, INF - Corporate Information Management - End Users (1), INF - SMC (30)	✓	✓	✓	✓	✓	✓	✓	✓	40 ... MEDIUM CABINET/FMB	Copy Permissions, Edit Permissions

Search Permissions & Replace User

- “Permissions are confusing enough as it is for end users” Incorporated functionality found in Fastman Permissions Manager into the environment and processes.
- Permissions Manager provides an option to display group membership and the nested groups
- Can easily view permissions applied to parent and child items – this is incorporated into our training modules to help end users understand how permissions are applied
- Ability to view permissions, security clearances, and supplementary markings all together

# Permissions Manager Focus

## Scenario: Improving the end user experience

1000 - Administration	Patrick Bisailon	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓
	DefaultGroup (8)	✓	✓									
	<No Public Access>											
	INF - Corporate Information Management - End Users (1)	✓	✓									
	INF - Corporate Information Management - IA (3)	✓	✓									
	INF - Infrastructure - Coordinator (3)	✓	✓									
	INF - SMC (30)	✓	✓									
1000 - Administration - General	Patrick Bisailon	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓
	DefaultGroup (8)	✓	✓									
	<No Public Access>											
	INF - Corporate Information Management - End Users (1)	✓	✓									
	INF - Corporate Information Management - IA (3)	✓	✓									
	INF - Infrastructure - Coordinator (3)	✓	✓									
	INF - SMC (30)	✓	✓									
1000-00 Policy and Procedures	Admin	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓
	DefaultGroup (8)	✓	✓									
	<No Public Access>											
	INF - Corporate Information Management - End Users (1)	✓	✓	✓	✓	✓	✓			✓	✓	✓
	INF - Corporate Information Management - IA (3)	✓	✓	✓	✓	✓	✓			✓	✓	✓
	INF - Infrastructure - Coordinator (3)	✓	✓	✓	✓	✓	✓			✓	✓	✓
	INF - SMC (30)	✓	✓	✓	✓	✓	✓			✓	✓	✓

Open

Configure

Order Custom Views

Add to Favorites

Copy

Make Shortcut

Add Reminder

Set Notification

**Permissions Manager**

Zip & Download

**Best Practice:** The ability to apply certain permissions to specific levels in the folder structure is key. We have different permissions applied down to a certain level before we allow end users to save content.

**Best Practice:** Allow users without 'Edit Permissions' rights to view permissions on objects

# Permissions Manager Focus

## Scenario: Compare and Copy Group Membership

DIIMS | Digital Integrated Information Management System Welcome Patrick Bisailon

Enterprise Personal My Favourites My Reports RM DIIMS Admin e-Approve Tools Search DIIMS for Search Enterprise

### Compare Groups

Compare Groups

"DIIMS User" "DIIMS\_Email Prod"

Group	Group
<input type="checkbox"/> INF - Corporate Information Management	<input type="checkbox"/> INF - Corporate Information Management
<input type="checkbox"/> INF - Corporate Information Management Edit Group	<input type="checkbox"/> INF - Corporate Information Management Edit Group
<input type="checkbox"/> *DIIMS Core Sign Edit Group Leave Group	<input type="checkbox"/> EIA - ARTS_WF - BF_135432259 Edit Group Leave Group
<input type="checkbox"/> INF - CIM - ORCS Development_WF Edit Group Leave Group	<input type="checkbox"/> EIA - ARTS_WF - BF_137249350 Edit Group Leave Group
<input type="checkbox"/> INF_PWS_DOT - Disposition Coordinator Edit Group Leave Group	<input type="checkbox"/> EIA - ARTS_WF - TEST_EAC Edit Group Leave Group
<input type="checkbox"/> MACA - Municipal and Community Affairs - Coordinator Edit Group Leave Group	

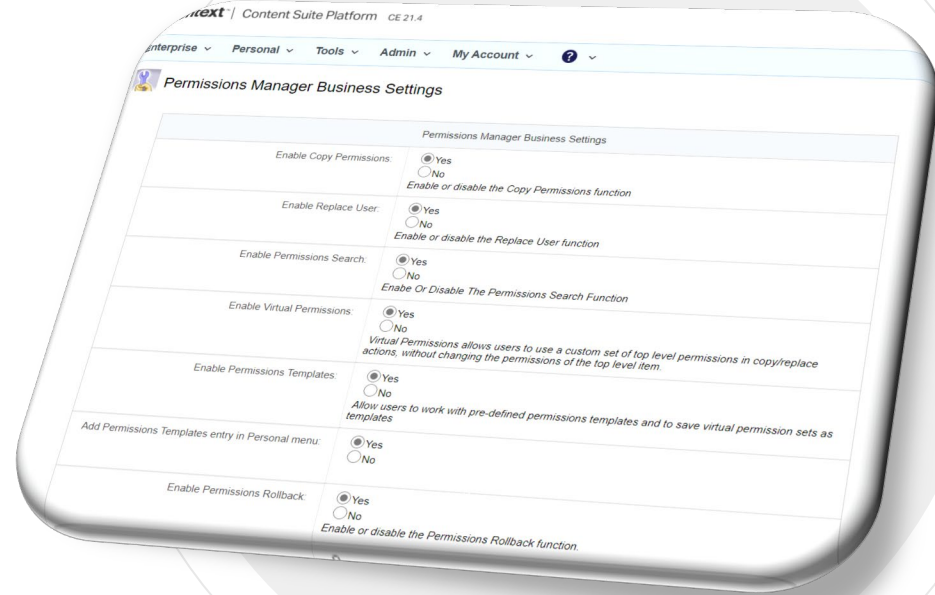
Copy Groups Leave Groups

Done

- GNWT uses the 'Compare Groups' feature daily for new account creation and modifications. Using Permissions Manager greatly reduces the effort and eliminates mistakes.
- Because most of our workflow processes are group based, this tool allows us to copy groups from one user profile to another
- Option for a user to leave a group or multiple groups

# Enable More Self-Service

- Reduce your **paid service requests** fees (\$) from your cloud provider
- Handle **bulk permissions** updates and ease user onboarding
- Enable **'Business Admin'** in your CSP and see all that can be done with **Permissions Manager** in the cloud





# GNWT Journey

GNWT initially deployed iRIMS for physical and electronic records storage

1



Deployed Content Suite across 12 departments and 3,000 users with over 28M items under management (email, documents, and physical items)

3



Today – continuing to run CSP 21.4 on-premise in mostly classic view and starting to incorporate the Smart UI in landing pages and WF processes.

5

Transitioned to the Content Suite Platform starting with Livelink 9.7.1

2

**Content Intelligence** – developed a wide range of workflow processes and solutions for Finance, HR, Ministerial Tracking System, etc.

4

Next up – investigating opportunities to integrate several internal systems with our CSP workflows.

6

# Recent New Features

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- **Extended support for role-based access**

- As more organizations move to business workspaces and xECM, this capability becomes invaluable.
  - Ability to Add/Remove/Rename roles while editing permissions on a workspace
  - Create New Roles for folders and hierarchies without leaving the main permissions window
  - Select ready-to-go roles on the workspace you are working within
  - Remove or rename a Role from one of multiple workspaces

- **Extended support for Cloud Deployments**

- Business Administration support
- Improved self-service
- Containerized deployments



# Recent New Features

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- **Improved self-service**

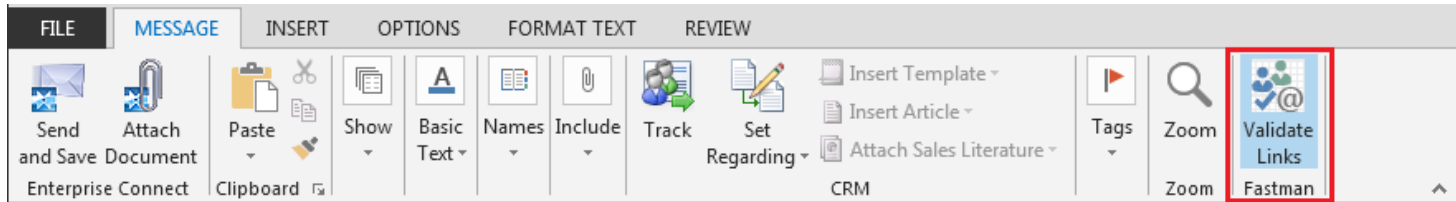
- Enable filtered permissions when performing Permissions Search on “Any User” / “Any Group”
- Ability to see Effective Permissions on item Permissions Manager launched from
- Replace User/Group and Copy/Replace add option to filter item type to apply changes to
- Change order of Roles/Groups on Edit Permissions to match other dialogs

- **Improved Admin / Management**

- On upgrade of Permissions Manager, default admin options for search and hierarchy limits to use DTreeAncestors (if set to Hierarchical SQL)
- Permissions Manager Reporting sample reports packaged as CS Application.

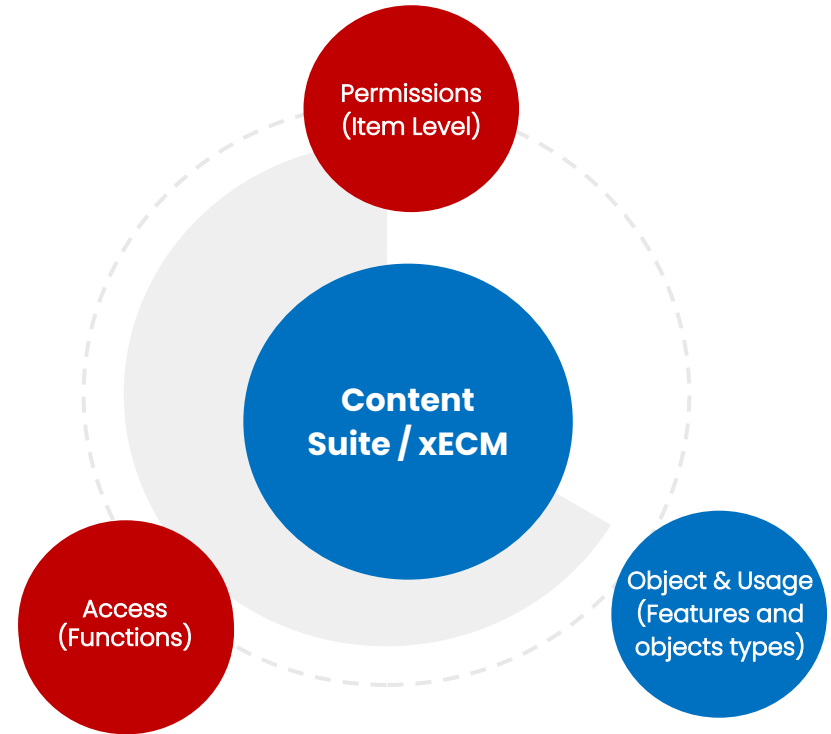
# Fastman Permissions Manager for Outlook

- Integration with Microsoft Outlook
- Validate recipients have access to Content Server linked documents
- “Add-on” for Fastman Permissions Manager.
- Validate access based on the effective permissions recipients have on the linked object(s)
- Permissions granted by group, role and direct access are all considered



# Access Manager – *Functional Control*

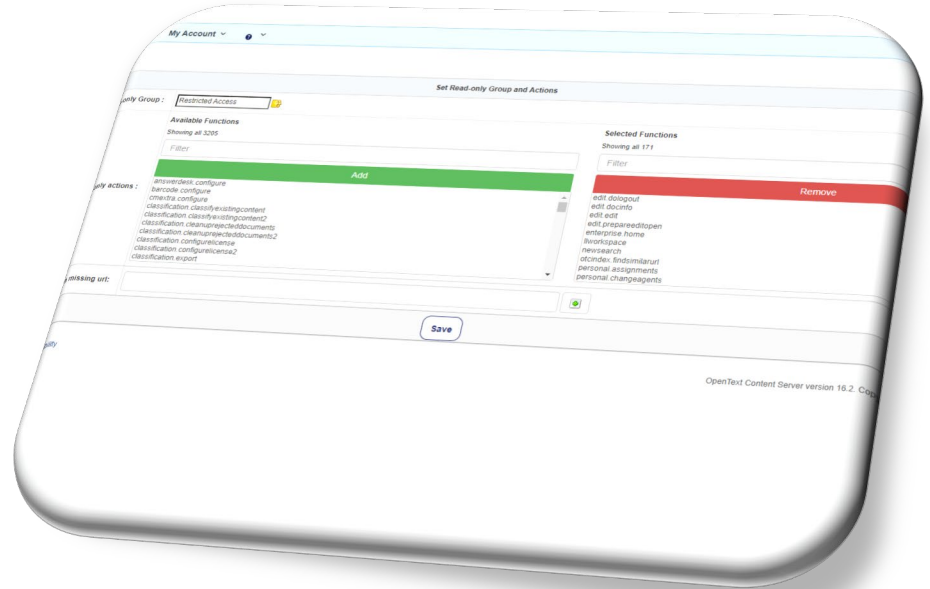
- **Control** what a user or group can execute regardless of data, feature, or location
- **Manage** included users via simple group membership
- **Enforce** read-only license provisions
- **Combine** with Permissions Manager for comprehensive access control solution



# Managing Risk

## Access Manager – **Functional Control**

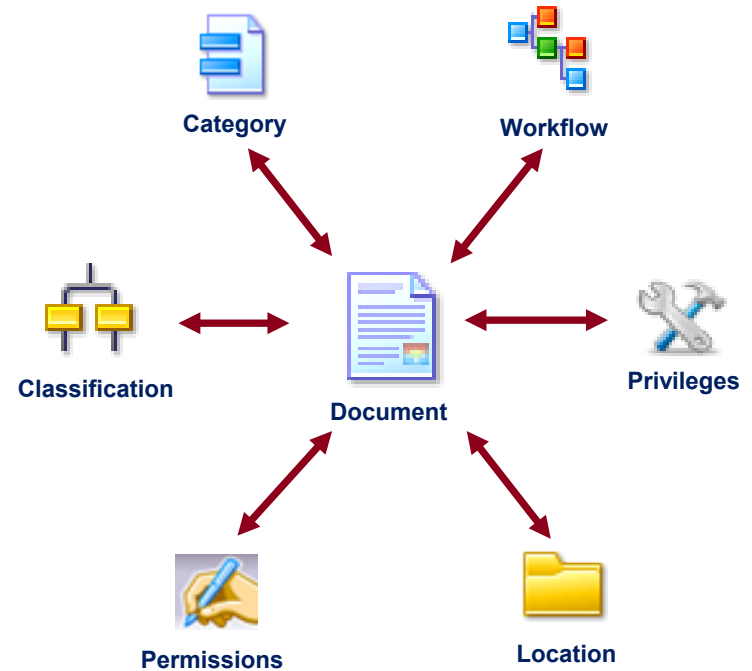
- Allow users to operate freely, provide clear and simple guidance on what they are and are not able to do
- Whilst ensuring license, functional, and security compliance



# Extend to multiple access profiles\*

## Access Manager – *Functional Control*

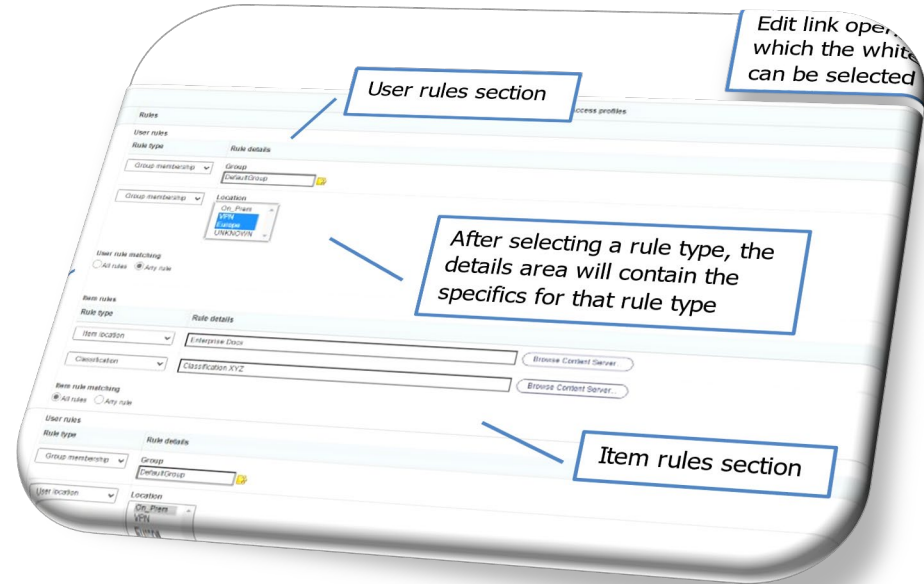
- Profile concept expanded from existing Digital Signatures solution



# Extend to multiple access profiles\*

## Access Manager – **Functional Control**

- Profile concept expanded from existing Digital Signatures solution
- Provides very granular control based on attributes, classifications, current location, etc.
  - Singularly or in combination
  - Forming a 'rule'
- Example – functional access from external VPN vs. inside the firewall





# About Fastman

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- Authorized OpenText Technology and Services Partner
- 15 years in business
- Offices in North America, Australia
  - Presence in Asia and Europe
- Focused OpenText Content Suite Partner
  - Products target access and permissions, data management, and digital/electronic signatures



# Some Current Customers



Certified & Deployed in the OT Cloud



# Fastman Services

Drive higher **value** from your platform



EIM Consulting



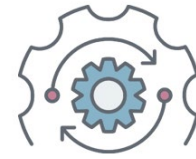
Consolidate and **protect** your information



Migrations and Upgrades



Maintain and operate your platform **effectively**



Enhanced Managed Support



# Contacts

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