

## 1.1 Advanced Security Consulting

### Service Description

Your eTapestry database provides you with the opportunity to restrict certain areas of the database for access. For this service, we will provide you with the proper know how to utilize this functionality moving forward while working to set up your existing security needs today in your live database. Your organization must have advanced security enabled in your system for this consulting to be used.

### Remote Preparation

Your organization’s prep work includes:

- Sign up to request consulting: <https://app.etapestry.com/hosted/ConsultingRequestForm/index.php>
- Finish training listed in Pre-Consulting Worksheet: [https://app.etapestry.com/hosted/ConsultingRequestForm/Pre-Consulting Worksheet Advanced Security.doc](https://app.etapestry.com/hosted/ConsultingRequestForm/Pre-Consulting%20Worksheet%20Advanced%20Security.doc)
- Return completed Pre-Consulting Worksheet back to [consulting@etapestry.com](mailto:consulting@etapestry.com)
- You will receive a scheduling link to sign up for time with a consultant

### Delivery Process

You will work with a consultant through the following steps. Once these steps are complete we will consider the services delivered and close your project. If you determine you need additional assistance in this or any other area, you can request additional consulting services using the request form below:

<https://app.etapestry.com/hosted/ConsultingRequestForm/index.php>

## 1.2 Project Approach

The following describes the implementation approach for **Advanced Security**.

| Project Approach     |                                                                                                                                                                                      |                                                                                                                                                                                                                 |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Phase                | Purpose                                                                                                                                                                              | Overview of Tasks                                                                                                                                                                                               |
| <b>Prepare</b>       | To coordinate with the consultant to schedule dates and times for each session. To provide consultant with necessary information regarding the queries and reports you want created. | <ul style="list-style-type: none"> <li>• Read HELP materials in eTapestry regarding Advanced Security</li> <li>• Complete Pre Consulting Survey</li> </ul>                                                      |
| <b>First Session</b> | To review advanced security functionality and customer specific needs                                                                                                                | <ul style="list-style-type: none"> <li>• Review Pre-Consulting Worksheet</li> <li>• Explain Advanced Security vs. standard built-in product functionality</li> <li>• Clarify specific customer needs</li> </ul> |

## Project Approach

|                       |                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-----------------------|-------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                       |                                                                                                       | <ul style="list-style-type: none"> <li>• Preview example security group</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Configure</b>      | To configure advanced security fields, queries and necessary user defined fields and security groups. | <p>Configure the following Functional Areas:</p> <ul style="list-style-type: none"> <li>• Consultant will create and configure security queries, groups and settings outlined in survey on and on initial call.</li> <li>• Please note consultant will create up to 10 security groups/settings. Customer will create any additional groups with the guidance of the consultant.</li> <li>• Consultant will test user access and security groups.</li> </ul>                                                                                  |
| <b>Second Session</b> | To walk through creation and usage of security groups, fields, user defined fields.                   | <ul style="list-style-type: none"> <li>• Walkthrough setup of user security groups, defined fields, queries and reports created by consultant for Advanced Security.</li> <li>• Customer will conduct a walk through with the consultant on how to create, modify and manage their own security groups.</li> <li>• Customer and consultant will adjust settings if necessary and retest.</li> <li>• Please note that any additional security groups or settings will be added by the customer once the second session is complete.</li> </ul> |
| <b>Wrap Up</b>        | To complete the activities required to formally end the implementation project.                       | Create an engagement summary document that outlining the list of groups, queries, and settings created. Any special instructions regarding customization.                                                                                                                                                                                                                                                                                                                                                                                     |