trustkey AccessControl

Ensure integrity and confidentiality of information

1

Access Controls for Process Experiences and Workspaces

2

Access Controls for Data Intelligence and Synchronization

3

Advanced Access Control with SensitiveDataControl

Access Controls for Process Experiences and Workspaces

Action Pack Space, Resource Space, Knowledge Space

Overview of process experiences and the concepts of members and permissions

	Action Pack Space			Resource Space			Knowledge Space	
Process Structure	**Template**	Owner Editor Launcher		**Template**	Owner Editor Launcher		**Template**	Owner Editor Launcher
	Shortcut	Manager Assignee Contributor Reader	• *Launcher Membership Control* • *Detailed Permissions*	**Shortcut**	*No membership specification*			
Process Execution	**Board**	Manager Assignee Contributor Reader		**Resource Group**	Manager Contributor Reader	• *Private-Flag* • *Permission-Levels* • *Detailed Permissions*	**Notebook**	Manager Contributor Reader
	Action Pack	Manager Assignee Contributor Reader	*Detailed Permissions*	**Resource**	Manager Contributor Reader	*Permission-Levels: Block/Grant*	**Knowledge Page**	Manager Contributor Reader	*Detailed Permissions*

Please check playbook on trustkey.eu for detailed description of membership rights.

Members and Access Refinement

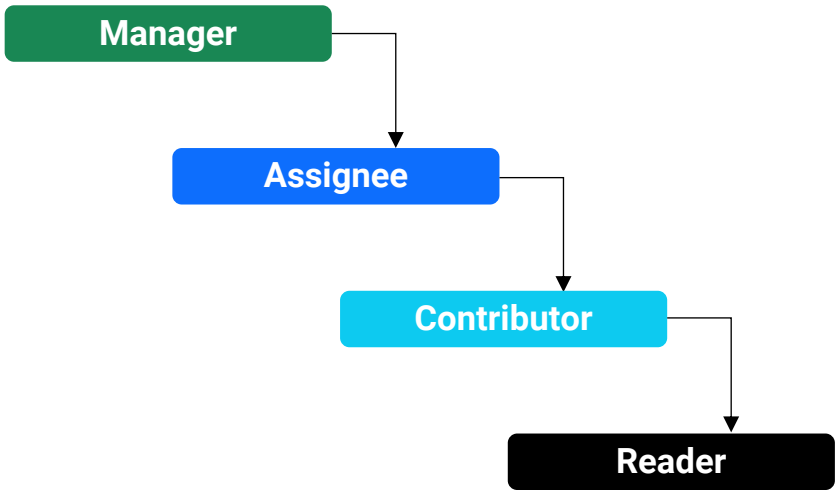
Member	Summary
Owner	… has full permissions for the Template and can publish and launch Templates.
Editor	… has the permission to edit Templates in draft mode and can launch published Templates.
Launcher	… cannot change Templates. They can only launch published Action Pack Templates or select the Resource and Knowledge Templates for Resource Groups or Notebooks.
Manager	… has full permissions and can manage members and permissions.
Assignee (Action Pack)	… has the permission to complete Action Packs, and their responsibility is indicated.
Contributor	… has the permission to edit.
Reader	… can only read the shared content.

Refinement	Summary
Launcher Membership Control (Action Pack)	Enables the definition of non-shortcut members' membership when a shortcut is launched.
Detailed Permissions	Specify what each member can edit and read for each section and component.
Private (Resource Group)	Designate a Resource Group as private: only members of the Resource Group can see it on the overview page and view Resources in the Lookup Component dropdown.
Permissions Levels (Resource Group)	Additional permission levels (All, All/Limited, Limited) can be set for Contributors and Readers. These permission levels control access to Resources within a Resource Group.
Block/Grant (Resource)	Block or grant access to specific Resources within a Resource Group.

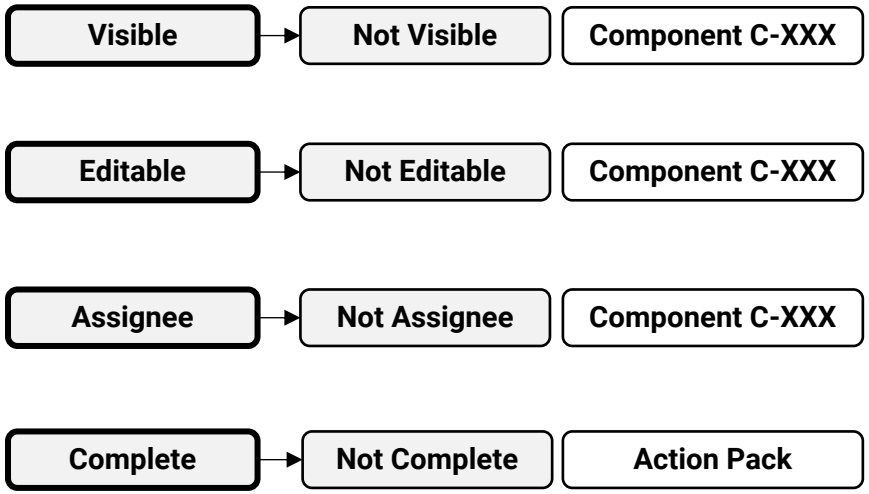
Please check playbook on trustkey.eu for detailed description of membership rights.

Inheritance of Group and User Permissions

Member Role

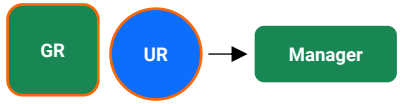


Detailed Permissions



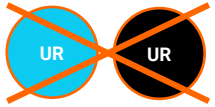
Examples of trustkey permission configurations

A user has membership in a group and holds individual user permissions, each granting different levels of access.



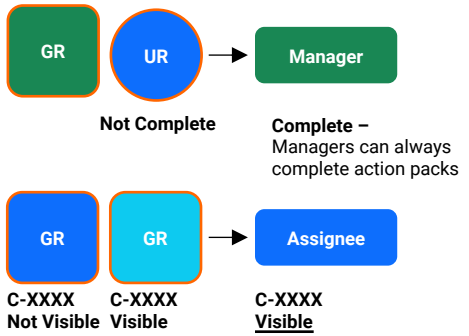
A user has memberships in two groups. Both groups have different levels of access.

Users cannot be members of trustkey elements with two different individual user permissions simultaneously.



Examples of trustkey permission configurations

A user has two memberships with different detailed permissions.



Group and user membership

Group

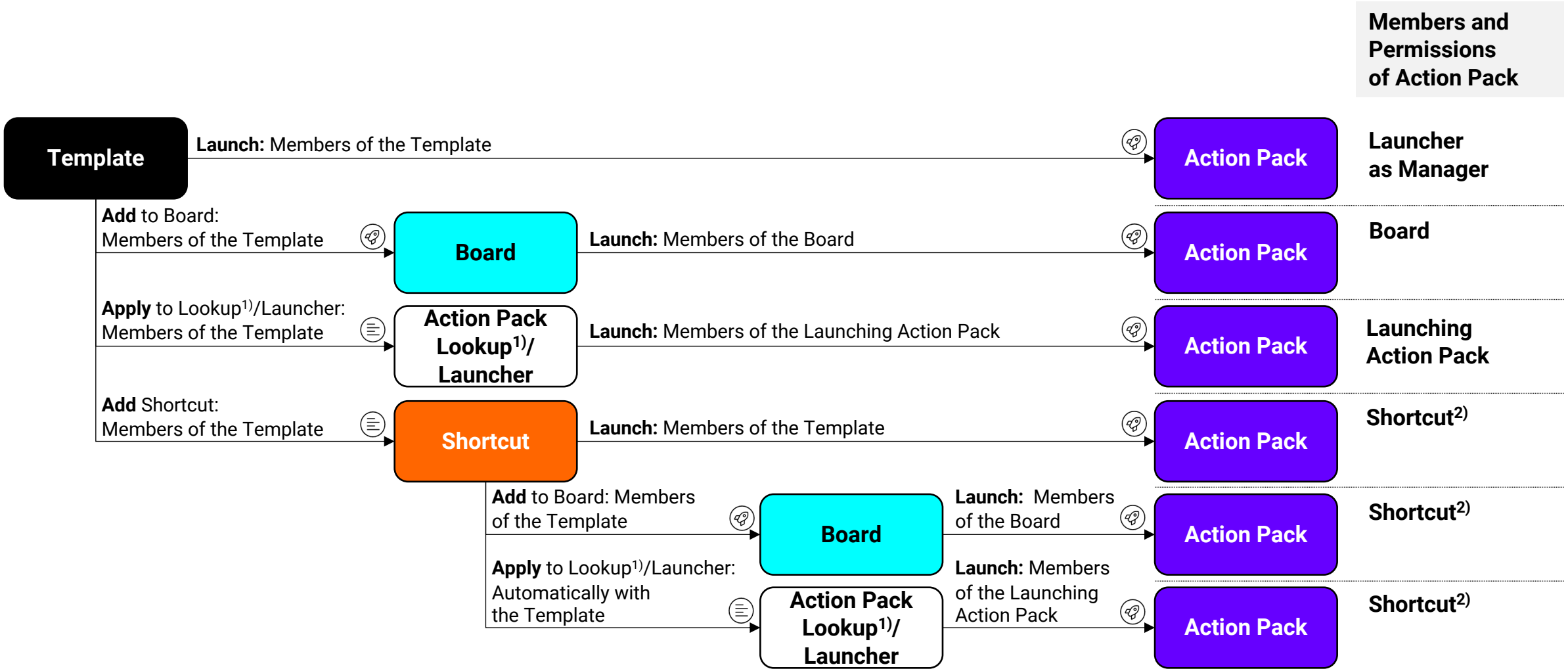
User

Note

Each action pack, board, resource group, resource, notebook, and knowledge page must have a designated **Manager** role.

When a user launches a template, adds a resource group, or creates a notebook, they are automatically assigned the **Manager** role.

Inheritance of Members and Permissions
Action Pack



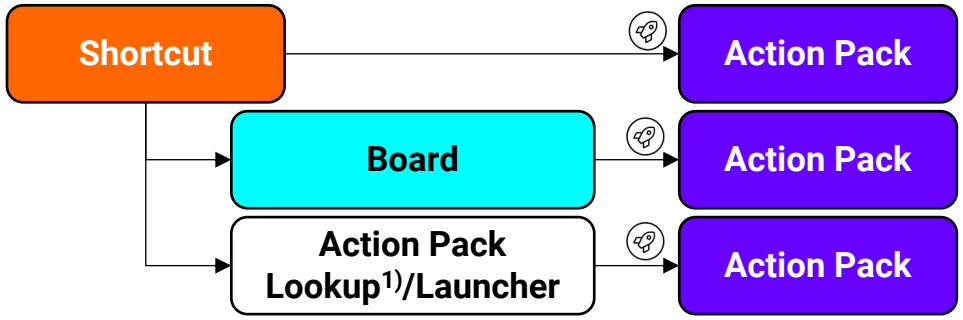
1) Function: “Allow Launching New Action Packs” enabled; Members of the Action Pack can view only those Action Packs in the Lookup Component in which they are also member.
2) If the Launcher is not Member of the Shortcut and the Launcher Membership Control is deactivated, the Launcher becomes Manager of the Action Pack

Inheritance of Members and Permissions
Action Pack - Launcher Membership Control

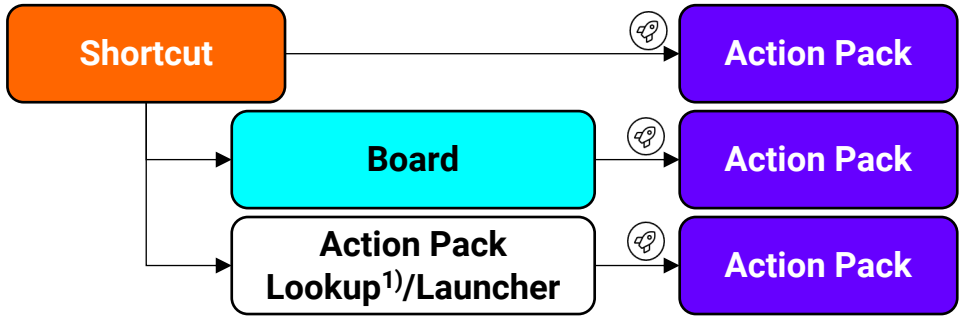
Launcher Membership Control

Launching Process

Deactivated



Activated



Shortcut Membership	**Launcher Membership Control**	**Launcher Membership of Launched Action Pack**	
		If Member of the Shortcut	**If Not Member** of the Shortcut
Manager	-	Manager	Manager
Assignee	-	Assignee	Manager
Contributor	-	Contributor	Manager
Reader	-	Reader	Manager
Manager	Assignee	Manager	Assignee
Assignee	Contributor	Assignee	Contributor
Contributor	Assignee	Assignee	Assignee
Reader	Reader	Reader	Reader

"Higher" role prevails

1) Function: "Allow Launching New Action Packs" enabled

Board or Shortcut – What is the right way to control access?
Action Packs

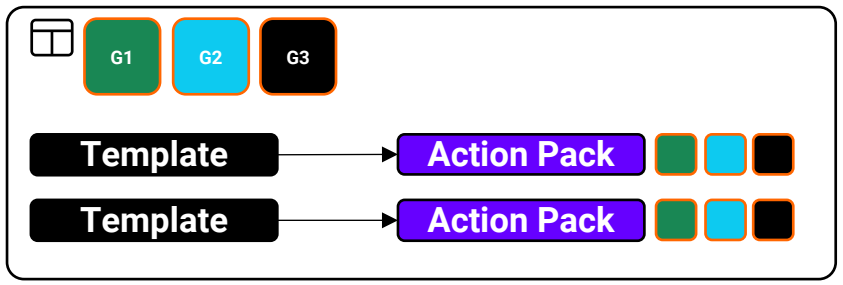
Board

Advantages

- **Role-Based Access:** Assign roles to control who can view, edit, or manage the board and its contents
- **Visibility and Organization:** Boards offer a clear, organized way to present information and resources, ensuring that access controls are applied consistently across related items

Use Cases

Project-Related Content: Manage actions across teams where members require varying levels of access, ensuring that permissions are applied uniformly to all board/workspace related content.



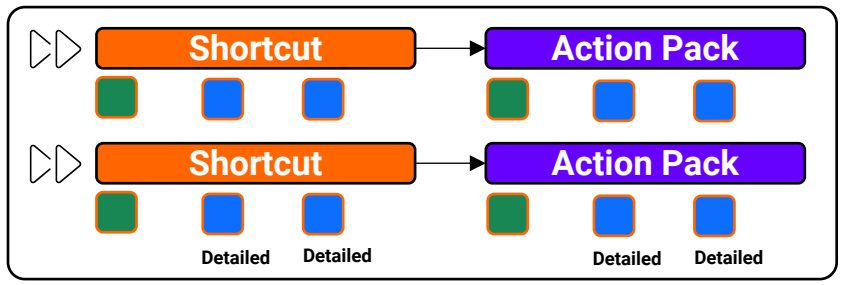
Shortcut

Advantages

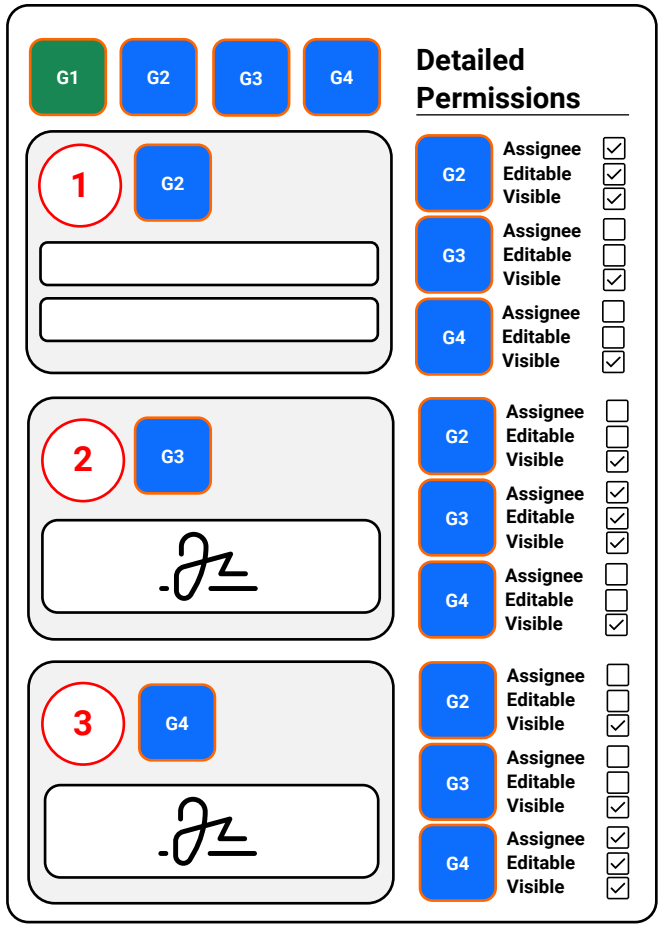
- **Comprehensive Access Control:** Shortcuts provide a detailed and hierarchical structure for managing permissions, making it easier to control access at various levels and roles.
- **Robust standardization:** Ensure that access control and permissions are consistently and effectively managed across the entire organization.

Use Cases

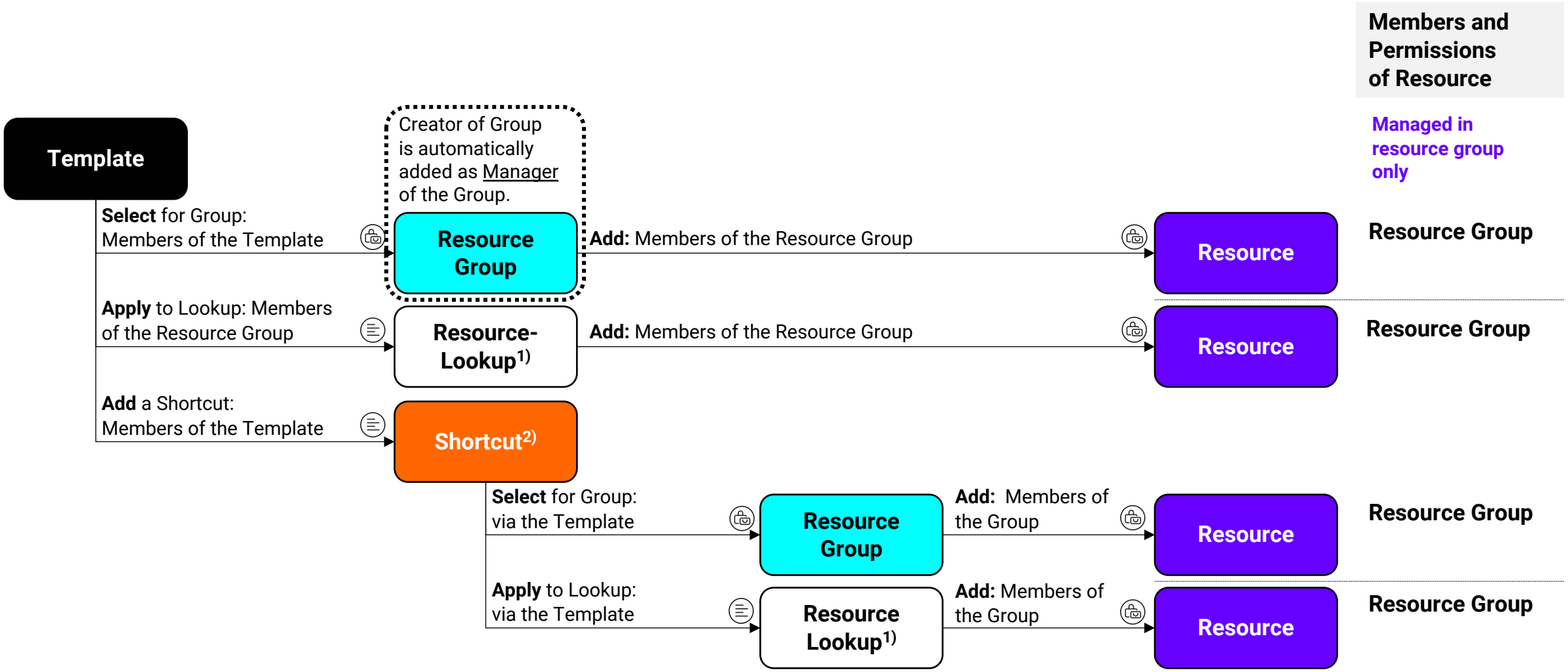
Compliance-Related content: Manage actions across teams where members require varying detailed levels of access, ensuring that permissions are applied uniformly to all process instances.



Example Shortcut Configuration



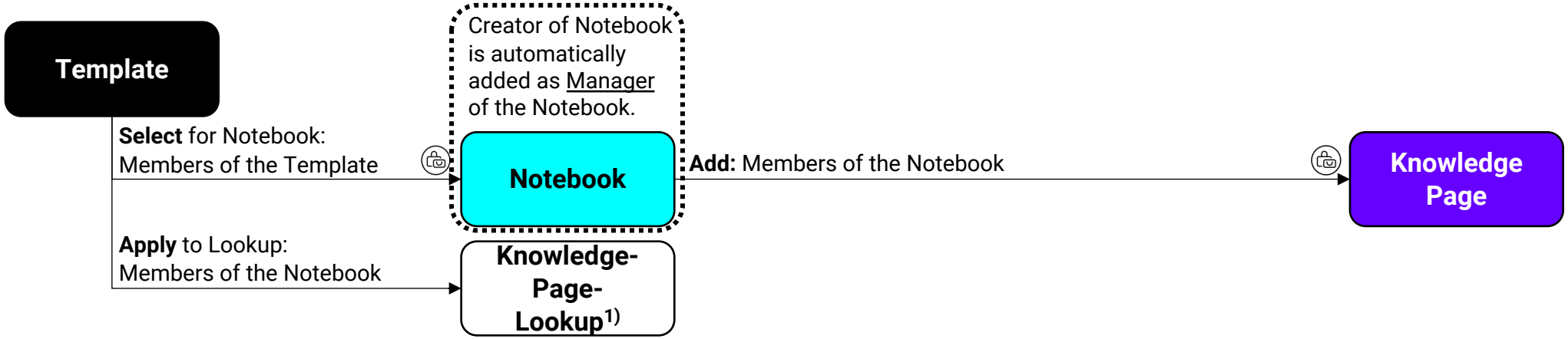
Inheritance of Members and Permissions
Resources



1) Function: “Allow to Add Resources” enabled; All members of the Action Pack can view a Resource in the Lookup Component dropdown unless the Resource Group is marked as private. However, to open a selected Resource, the user must have membership to that specific Resource.
2) For Resources Members and Permissions cannot be set for Shortcuts.

Inheritance of Members and Permissions
Knowledge

Members and Permissions of Knowledge Page



Notebook

1) All members of the Action Pack can view a Knowledge Page in the Lookup Component dropdown. However, to open a selected Knowledge Page, the user must have membership to that specific page.

Recommended steps to set permissions

1

Define Process Structure Team
The Process Structure Team is responsible for providing and maintaining business processes within trustkey.

2

Define Groups for your organization
- The best way to start is by using your organizational chart to represent these groups in trustkey
- Then, fine-tune the groups based on their specific roles and responsibilities

3

Build und publish Templates:
Action Pack
- Owner: Process Structure Team
- Editor/Launcher: Process Execution Team

Resource
- Owner: Process Structure Team
- Editor/Launcher: Process Execution Team

Knowledge
- Owner: Process Structure Team
- Editor/Launcher: Process Execution Team

4

Create Shortcuts for compliance-related work
- Manager: Process Structure Team
- Assignee/Contributor/Reader: Process Execution Team

Create Shortcuts for standardization and simplification purposes

5

Create Boards/Workspaces for project-related work
- Assign Manager: Project Managers
- Invite Project Execution Team as Assignees, Contributors or Readers

Create Resource Groups
- Assign Manager: Process Structure Team
- Invite Project Execution Team as Contributors or Readers
- Fine-tune access by detailed permissions and permission levels

Create Notebooks
- Assign Manager: Process Structure Team
- Invite Project Execution Team as Contributors or Readers

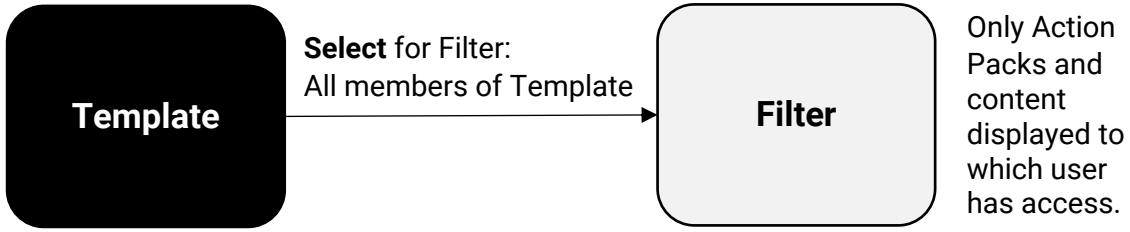
Access Controls for Data Intelligence and Synchronization

Analytics, Integration Portal, Designer

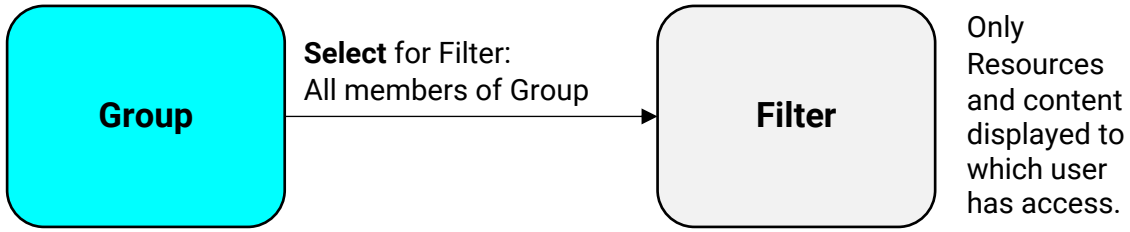
Analytics

Standard Reports

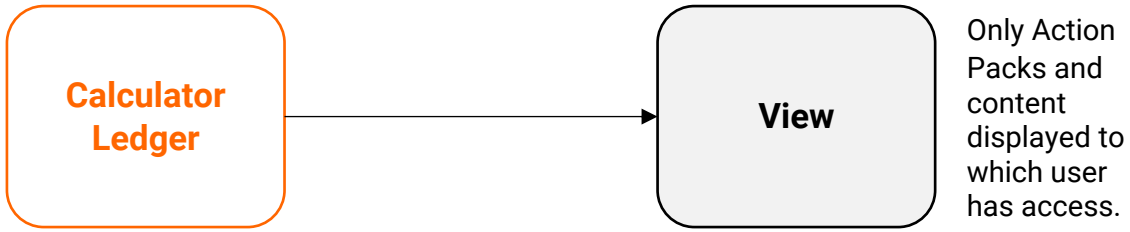
Action Packs



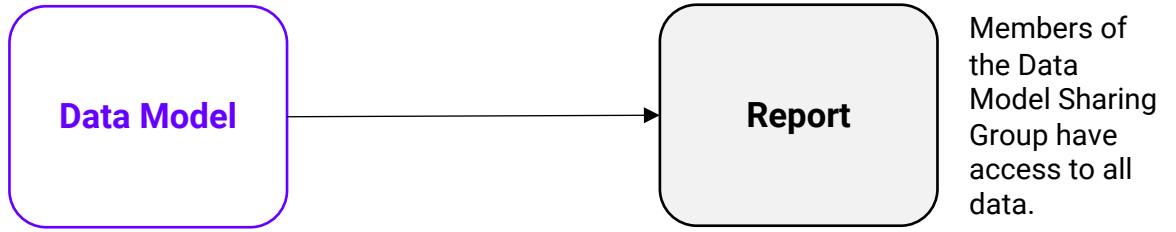
Resources



Ledger

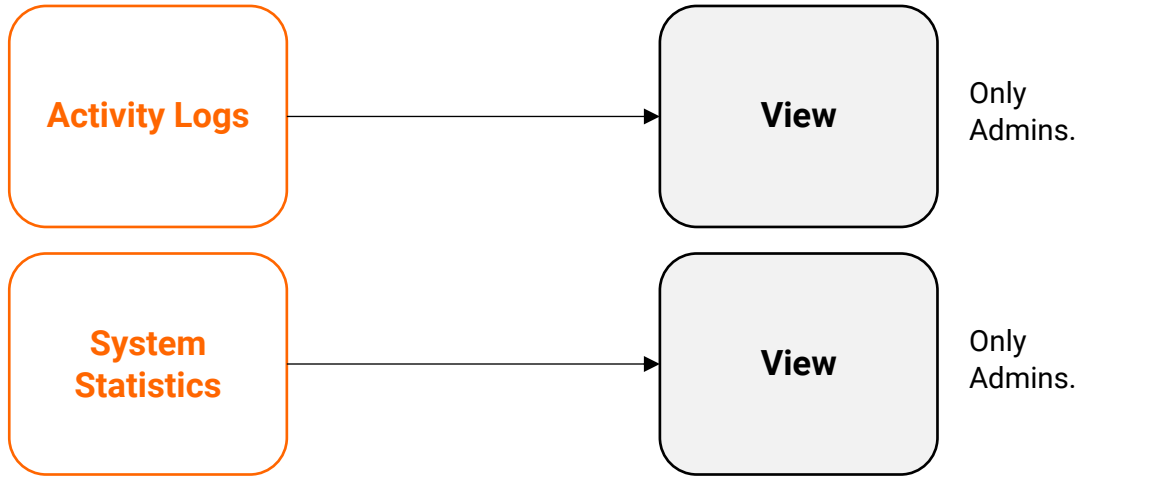


Designer Reports



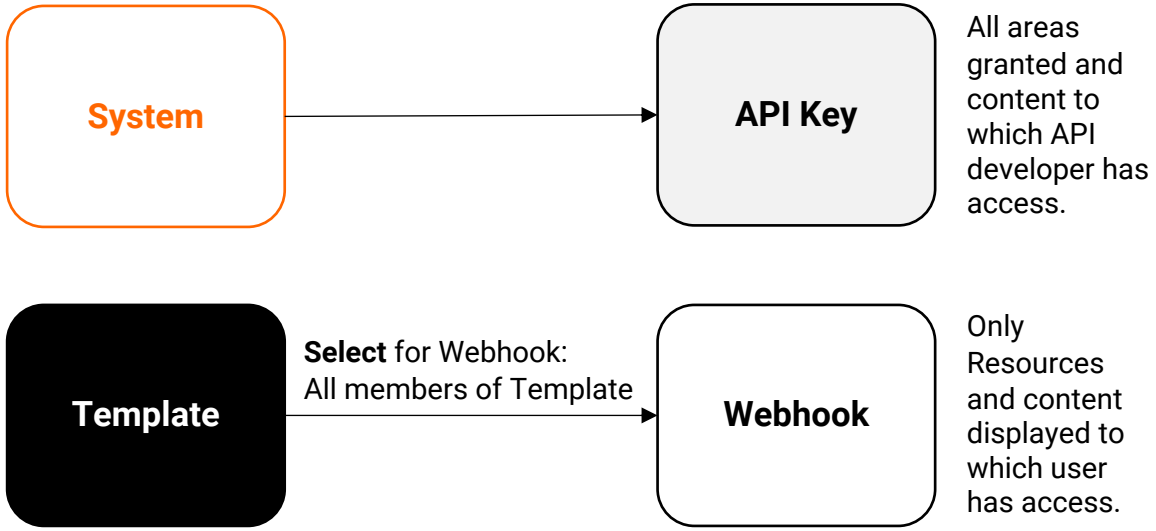
Requires Add-On: Designer

System Reports

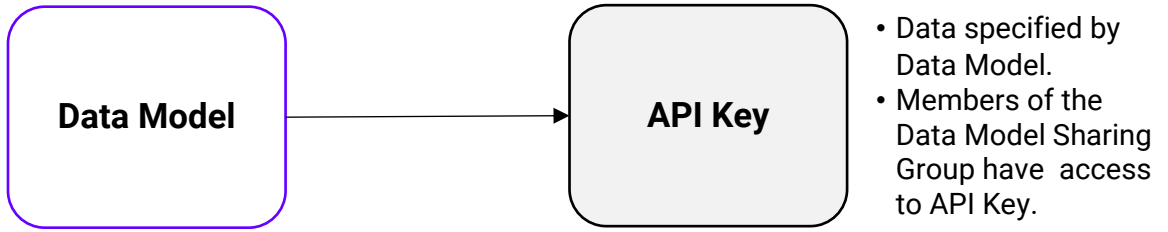


Integration Portal

General Connectors

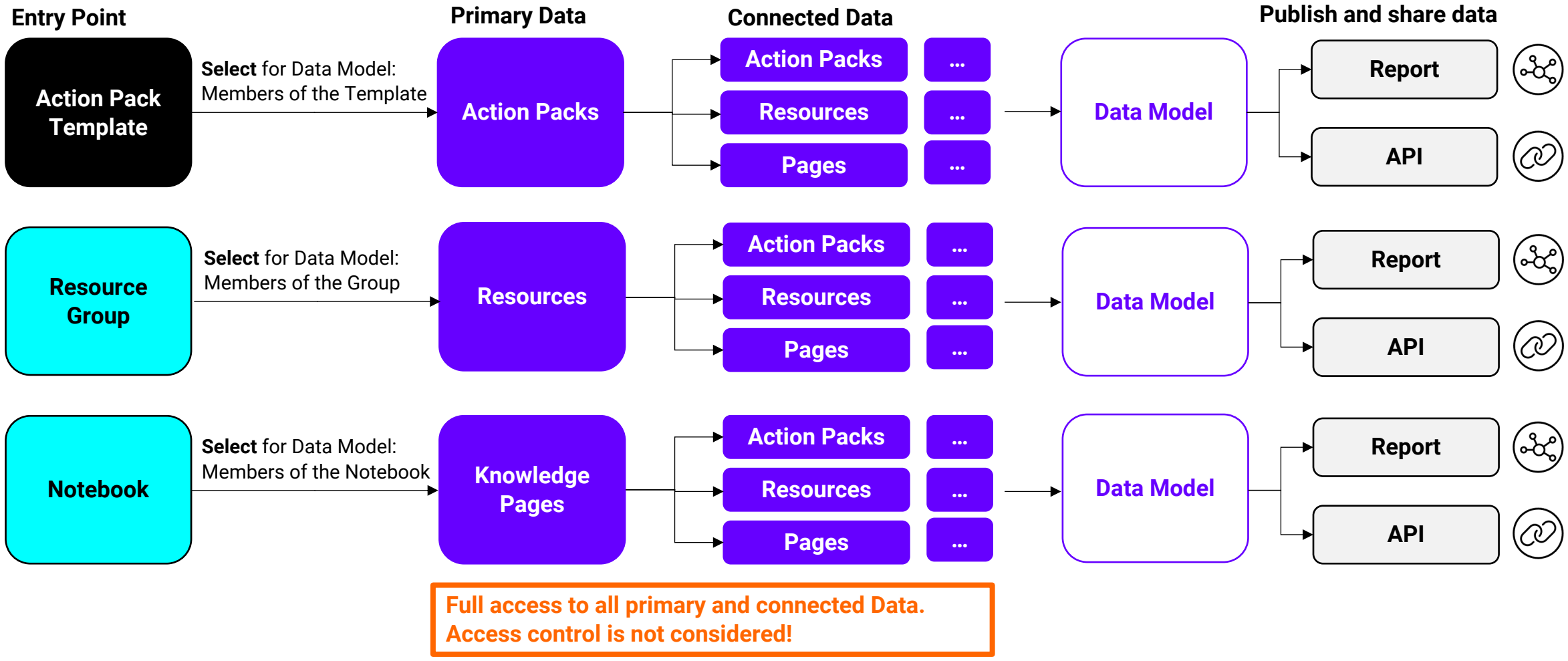


Designer APIs



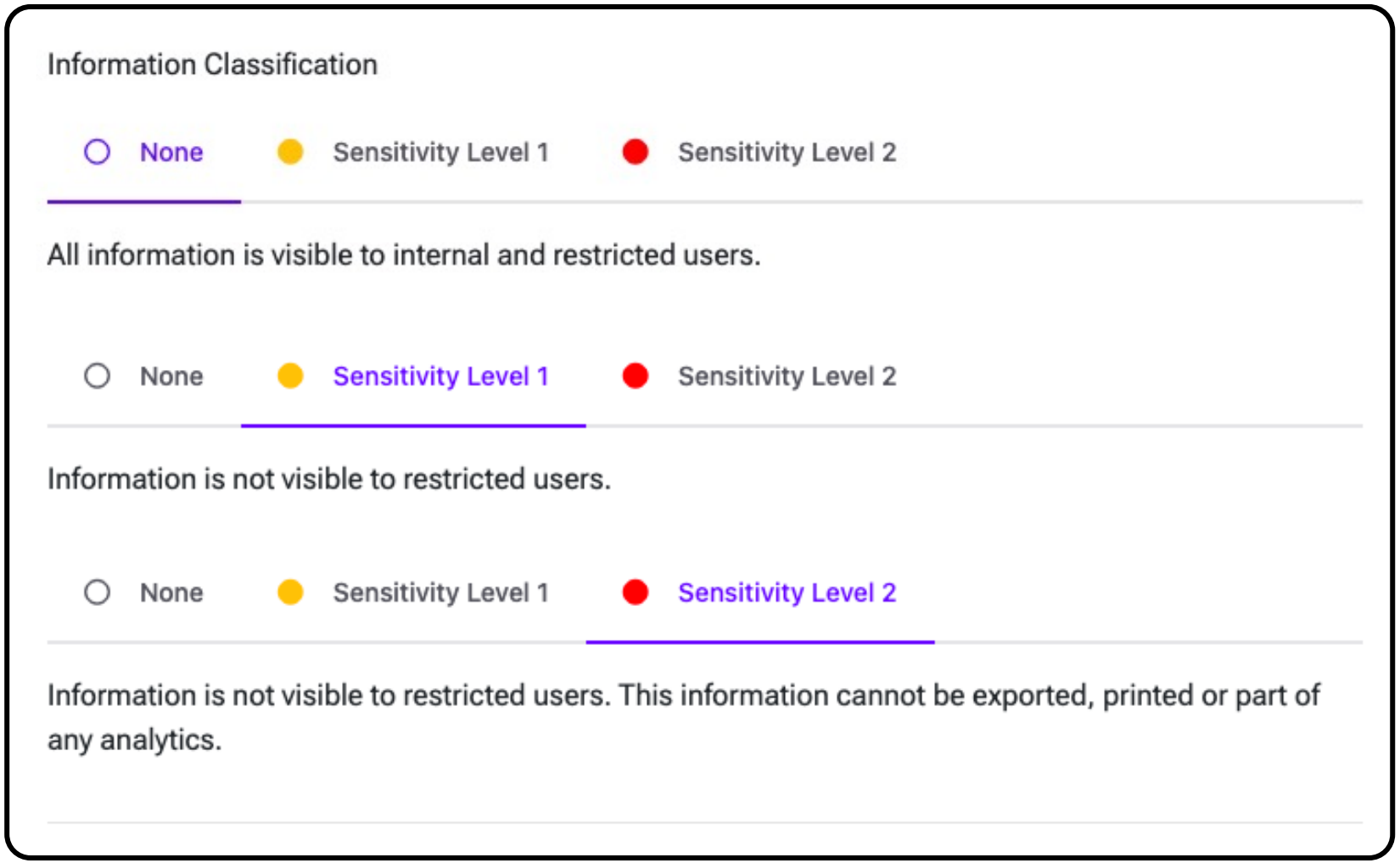
Requires Add-Ons: Designer and Integration Portal+

Designer


Entry Point
Primary Data
Connected Data
Publish and share data
Action Pack Template
Select for Data Model: Members of the Template
Action Packs
Action Packs
Resources
Pages
...
Data Model
Report
API
Resource Group
Select for Data Model: Members of the Group
Resources
Action Packs
Resources
Pages
...
Data Model
Report
API
Notebook
Select for Data Model: Members of the Notebook
Knowledge Pages
Action Packs
Resources
Pages
...
Data Model
Report
API
Full access to all primary and connected Data.
Access control is not considered!

Advanced Access Control with SensitiveDataControl

With SensitiveDataControl access and usage of information can be further refined



Define on the template per component the sensitivity level of an information.

Requires Add-On: SensitiveDataContol.

Stay in contact.

trustkey

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Process Execution Platform

Structure, Connect, Automate

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