How to Use Access Requirements and Tracking

Why?

Access requirements and tracking those requirements is complicated. A script can be used to monitor all access requirements and as they get complete they will be removed from the Aggregated View.

- Provides a quick way to update status of each individual access requirement and run a script to provide a 1000 ft view.
- Aggregated View provides a helpful view for EM as we need to complete each item.
- General Access continues to be a pain point for our engagements, we must get better at identifying and solving access problems as early as possible in these engagements to allow for maximum ROI for our clients.

Initial Population Instructions

1. Review the demo video recorded.
    a. Access Tracking Demo
2. Make a copy of the Access Requirements Template. Found in PS Delivery → Methodology [Access Requirements] sheet.
3. Fill out automation systems in the *Introduction* Tab.
4. Note: The *Details* tab is just informational. The script doesn't use or update this. Just for "you" to document helpful information.
5. *Developer* tab, starts with an "outer" bound of possibility to consider.
    a. Each row should represent a "type" and notes should be added.
    b. Note: Rows can be deleted if they're not in scope for this client.
    c. Note: Rows **can and should be added** if something else is needed.
    d.
6. *Network Access* tab, have sane defaults, but Source system and actual system names should/must be updated.
    a. E.g. the source system of "Orchestration" is a generic name, you would update that to "Ansible Tower" as an example.
    b. Both the source and destination systems should be updated to meet the client's environment builds.
    c. Note: There is a section for *Development* and *Production* needs.
7. *Sample Tool* tab, **is just an example** and not considered in the tool. This sheet should just be duplicated and updated on a per client tool basis. Example: duplicate `sample tool` and rename new tab to Ansible Tower etc.
8. *<fooBar> Tool* tab.
    a. If any rows simply are never going to be needed or impossible just delete the rows.

    b. Keep only the rows where access is needed and we need to track it.

Run Script to Generate Aggregated View

9. Go to PS Delivery → Methodology and open the sheet called [Access Tracker Mapping].
    a. Add your client's name in column “A”, and the google sheet UUID from the URL of your <client access requirements> sheet you copied earlier.
    b. In the column “Scope” add the integer 1. Typically you can remove the 1 from other companies so the script doesn’t run on all customers. We only want it to run for ours since we’re focused just on that client.
10. Go back to the client specific sheet and go to the *Aggregated View* tab. In cell G-12 click on the `run script` link. Allow permissions.

Need to Knows

- The intention of the aggregated view is to understand what is left to do and provide both a table and written view (for emails/slack/etc) of the status.
- “X” in column A is only needed when that item is completed/done. Once that “X” is added to that row it will be removed from the Aggregated View after Script is run.
- Each time “X”s are added as access has been completed the script must be rerun to keep the Aggregated View up to date.
- Rows in the different tabs are meant to be deleted and added as client requirements dictate.
- Use the “Priority” column to understand what is most important