SPP - User Deactivation

Objective and Scope

The purpose of this User Deactivation Operation Procedure (OP) is to provide a step by step procedure for User deactivation in the iCare CRM application, in compliance with Solvay Security Policies.

This procedure applies to:

- iCare CRM Salesforce.com IS solution
- All iCare CRM end Users and their GBU User Responsible
- IT users: both Solvay internal employees working for IS and external IT subcontractors

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Key Roles and Responsibilities

- **User direct manager** Direct manager of the user, responsible to request the access request or Removal to CORE CRM.
- **GBU User Responsible** Person in the GBU in charge of centralizing and creating the IS request, can be the Data Steward, CRM Champions, listed in CORE CRM Key User List
- **IS CRM Build - Security team** Team in charge of maintaining the authorization concept for the CRM of the Solvay Group in All Environments.
- **IS CRM Adoption team** Team in charge of Critical Users /Access Daily Operations in PROD and UAT Environments.
- **IS CRM Support (CGI)** External Provider team in charge of Access Management Daily Operations in PROD and UAT Environments

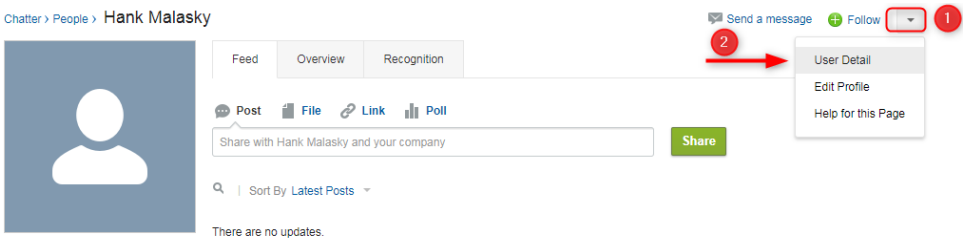
Abbreviations	Definitions
CRM	Customer Relationship Management system
SBS	Solvay Business Services
IS	Information Services
GBU	Global Business Unit
Freshdesk	Ticketing system used for IS tickets management
GUDsis	Global User Database Solvay information services
SISO	Solvay Information Security Organization

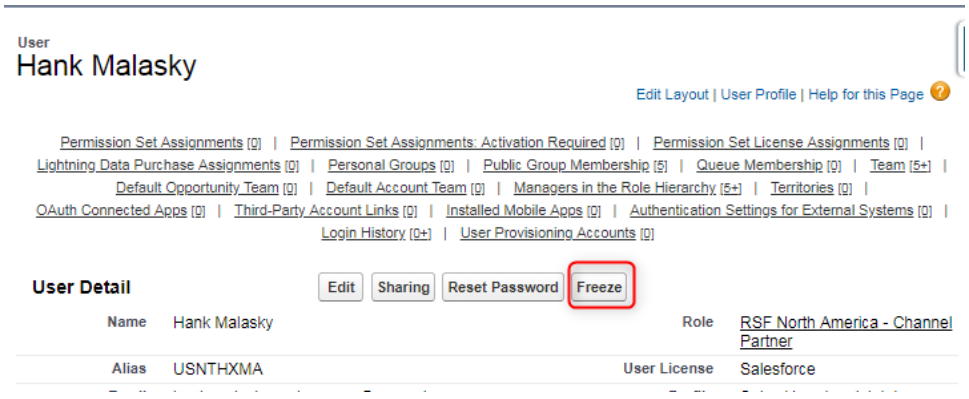
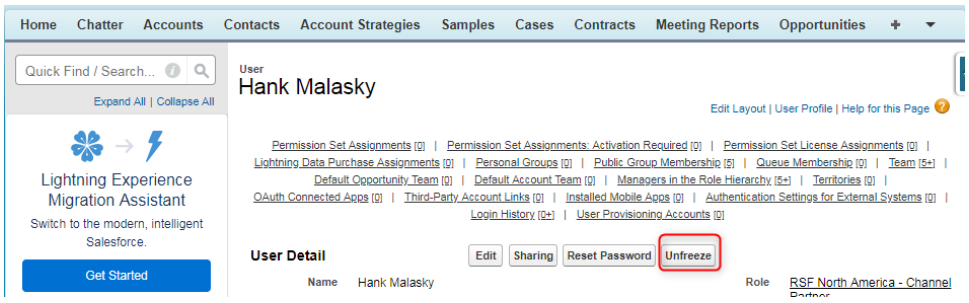
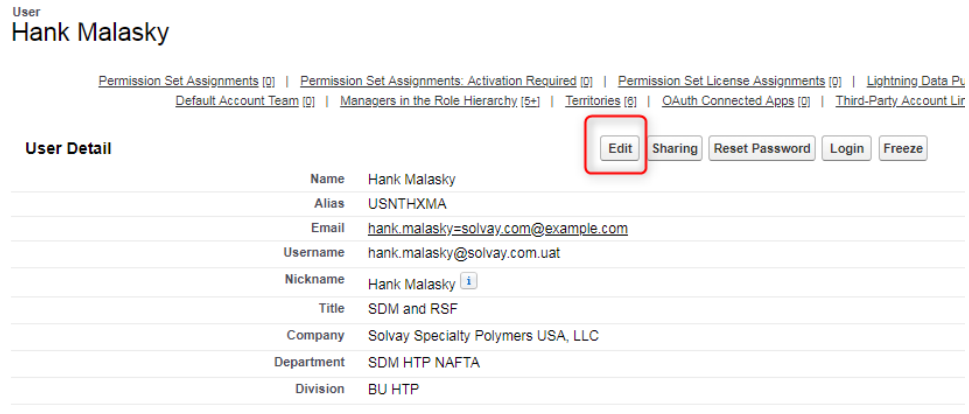
General Guidelines

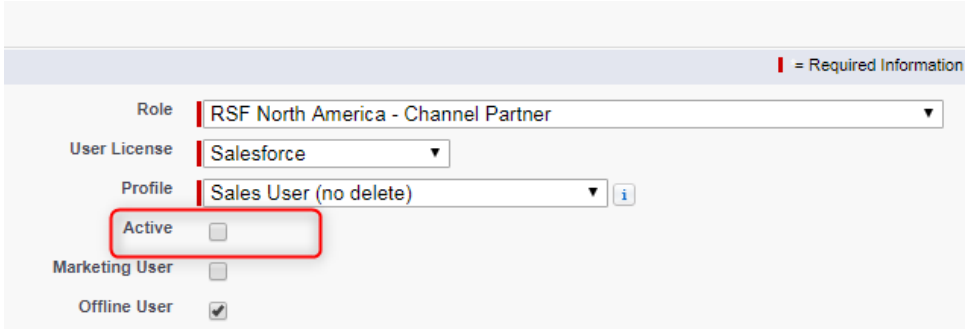
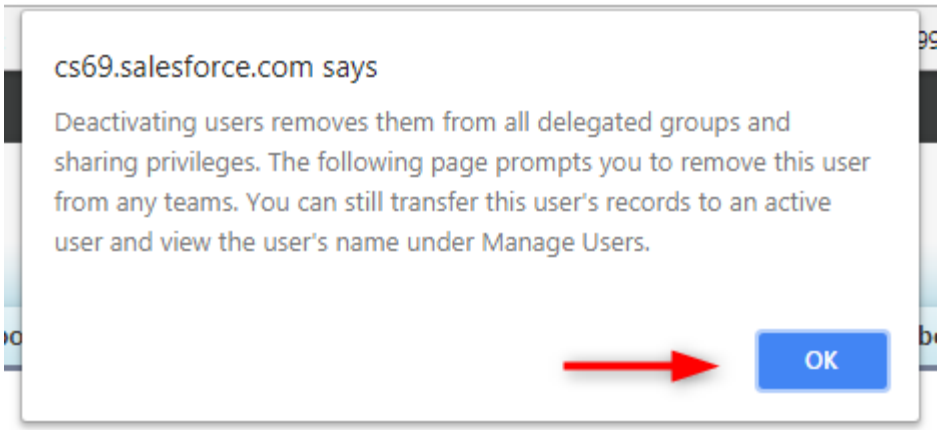
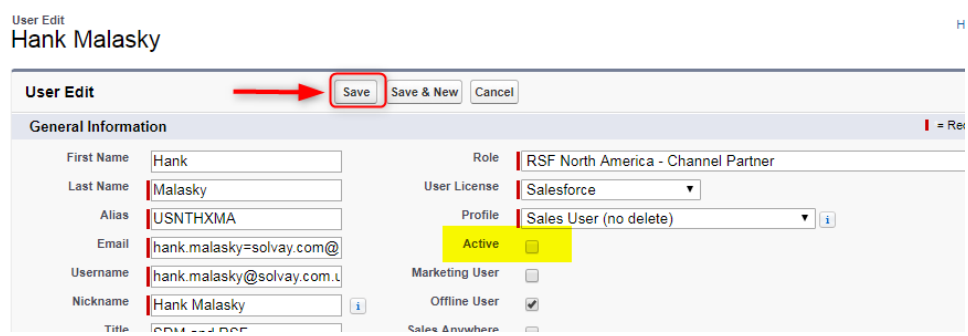
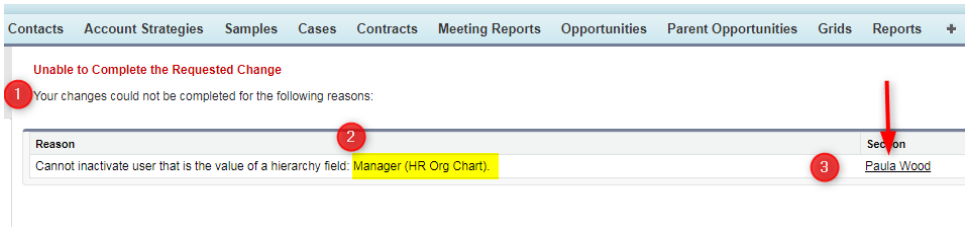
This Operational Procedure follows the same Key principles as described in the SBS-P-DAPP-00x-yyy-CORE CRM User Access Management:

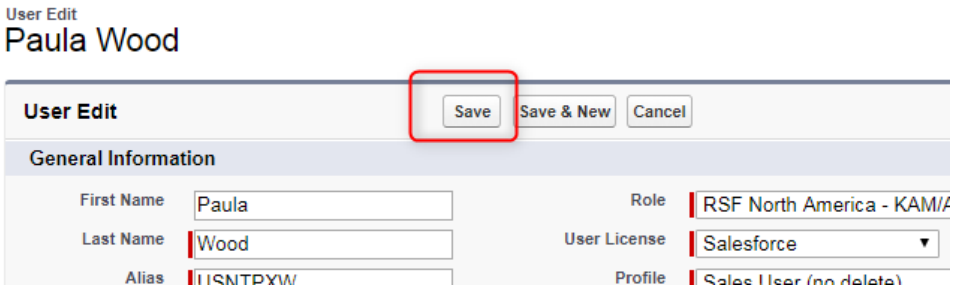
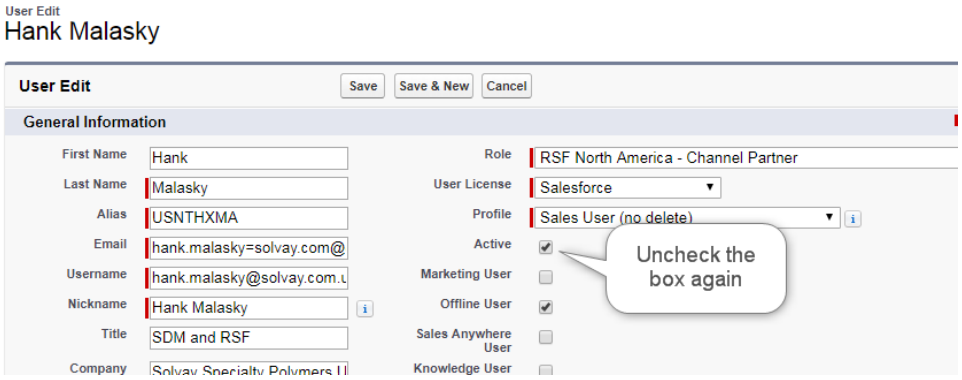
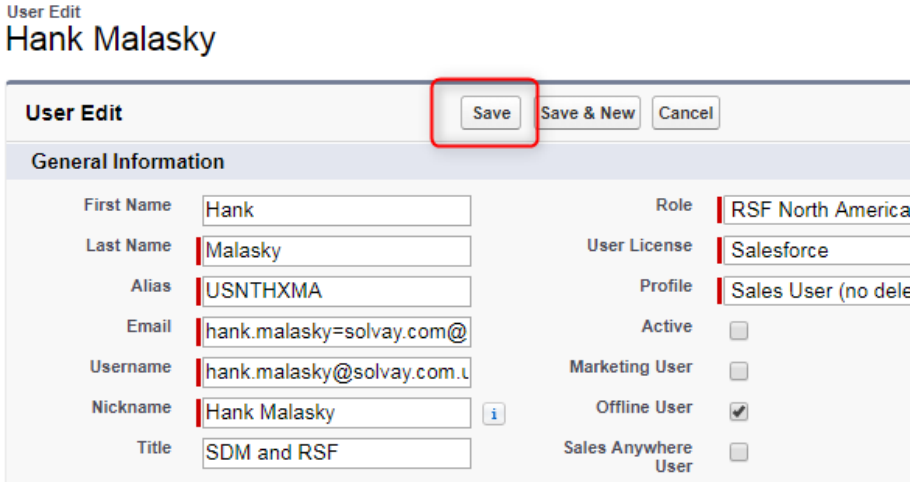
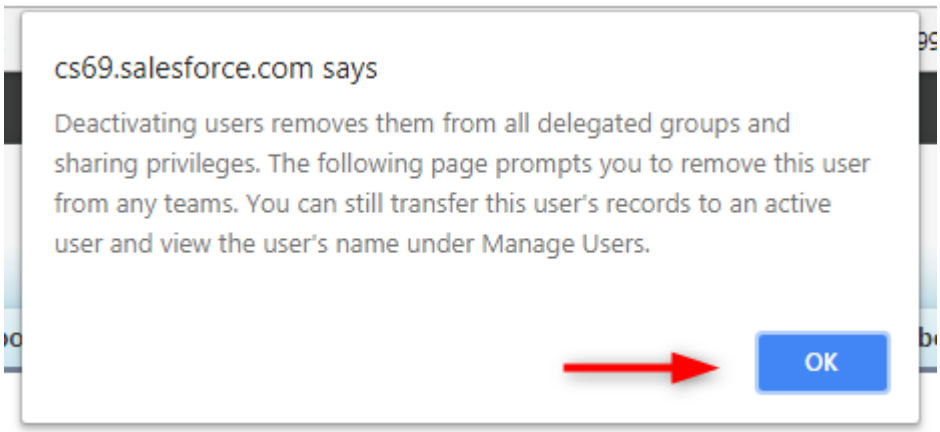
- Any request related to Users, has to be initiated by the User's direct manager.
- The User's direct manager is in charge of reporting any kind of change related to the user that can have an impact on access rights: change of job, leaving, retirement.
- All Requests should be record in IS Ticketing System, Freshdesk.
- All situations not described in this document shall be treated as exceptions and individually evaluated with IS CRM Build - Security team.

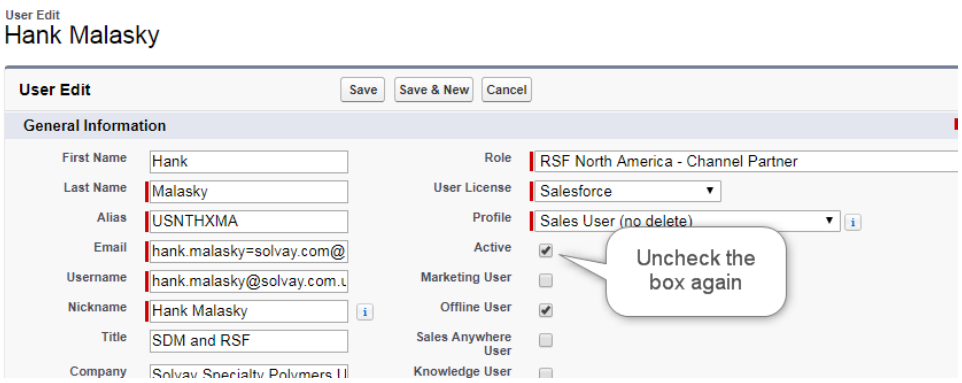
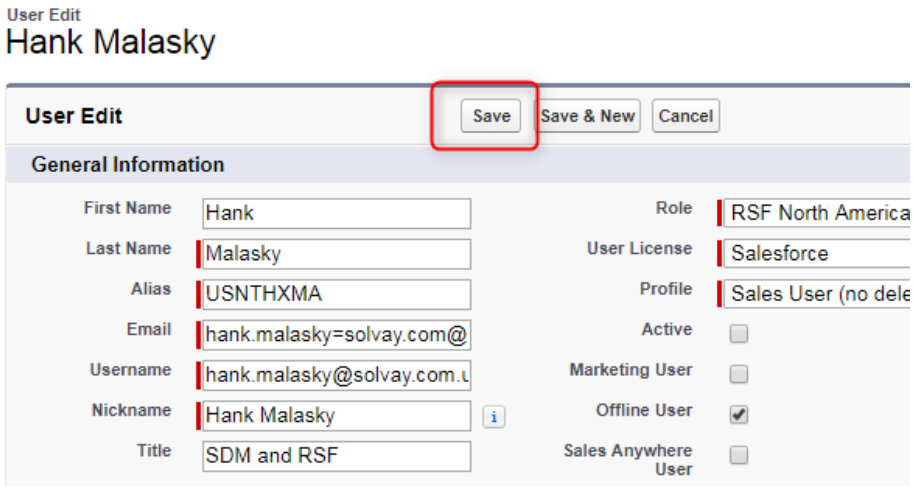
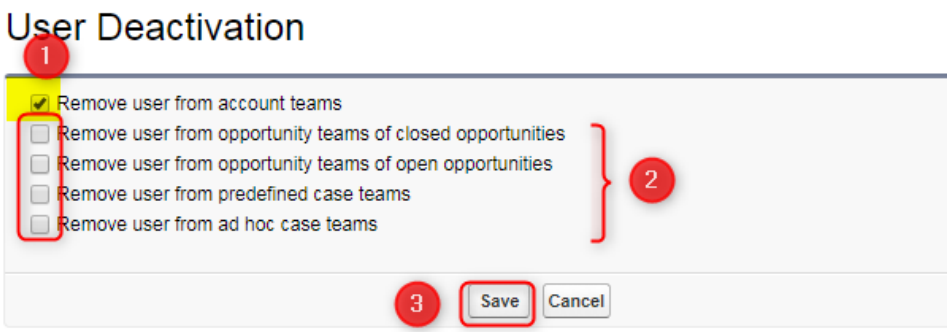
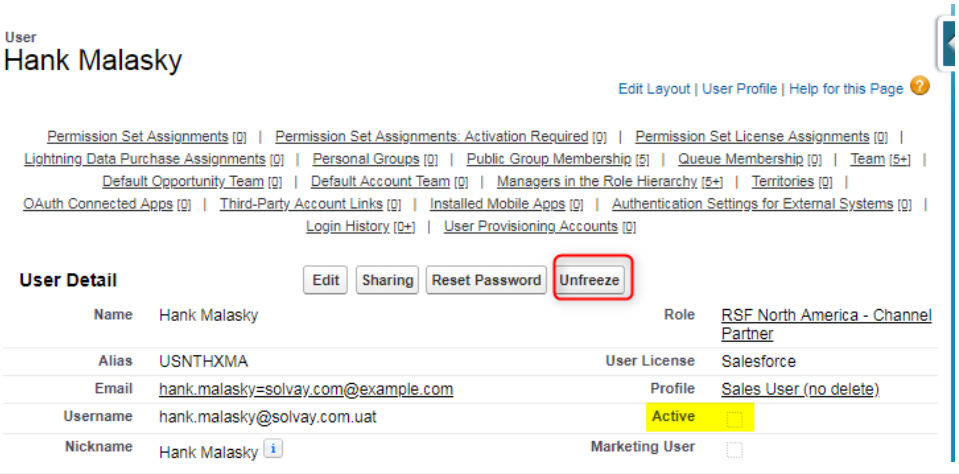
Procedure

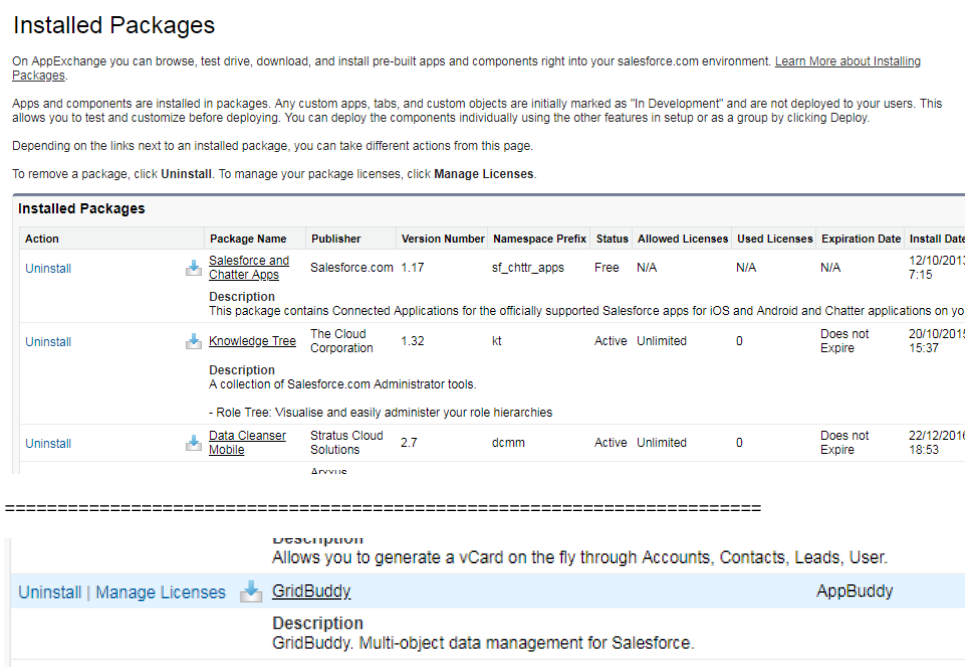
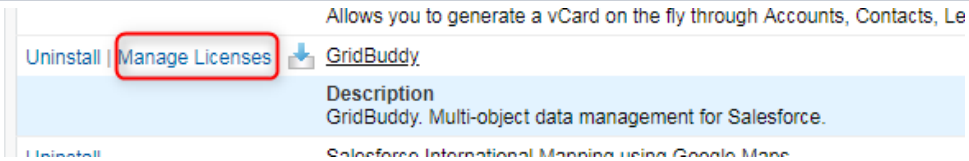
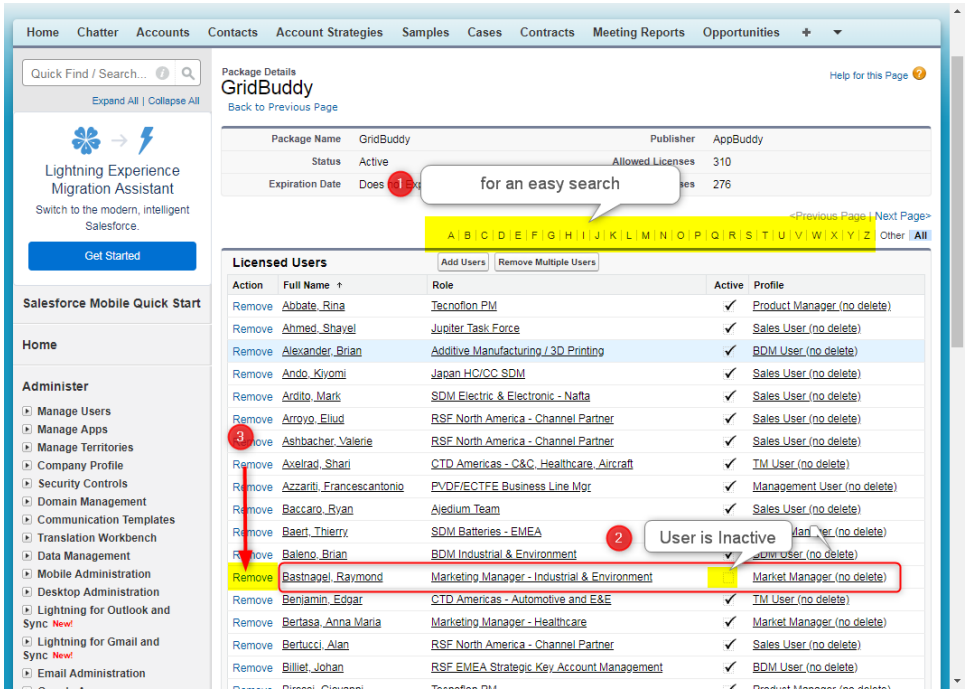
1	Log in to the SSP CRM	
2	Search for the User using his /her name or email Click on the user's name On the User's profile page, click on the icon and then on 'User Detail'	

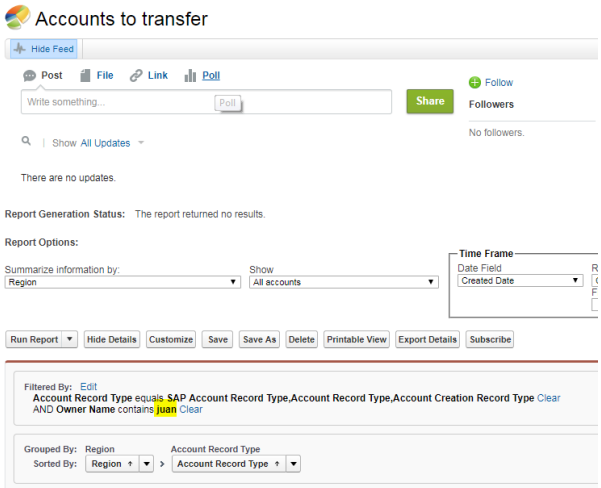
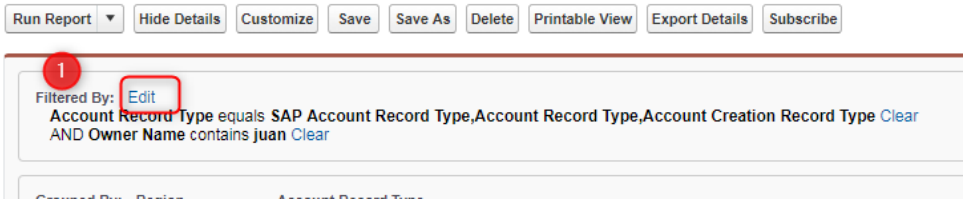
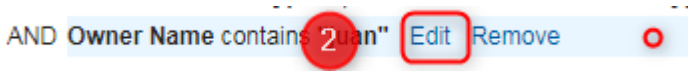
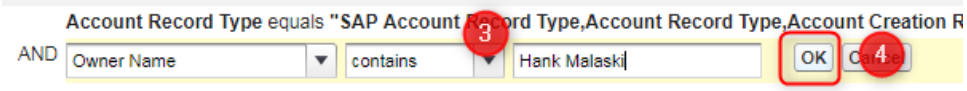
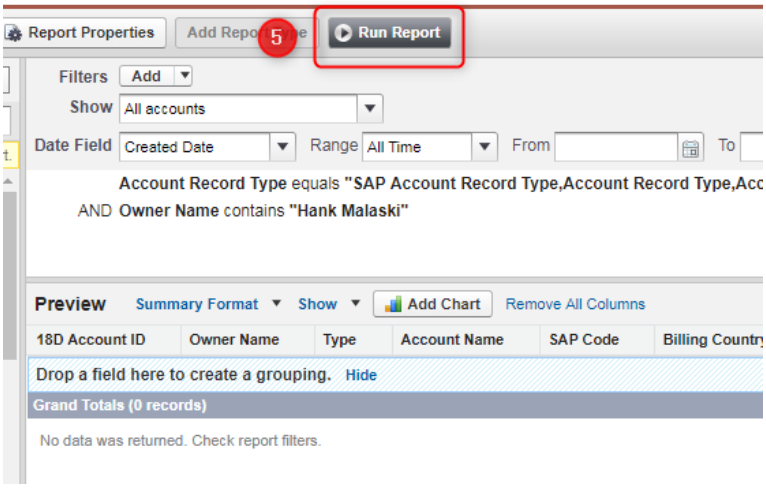
2.1	Freeze User (this action can be reverted at any moment)	
2.2	[Optional] : Unfreeze User	
2.1	Slide down to identify the manager of the user to deactivate	
2.3	[Optional]	Email the manager to confirm/validate the user 's deactivation
3	Click the button 'Edit'	

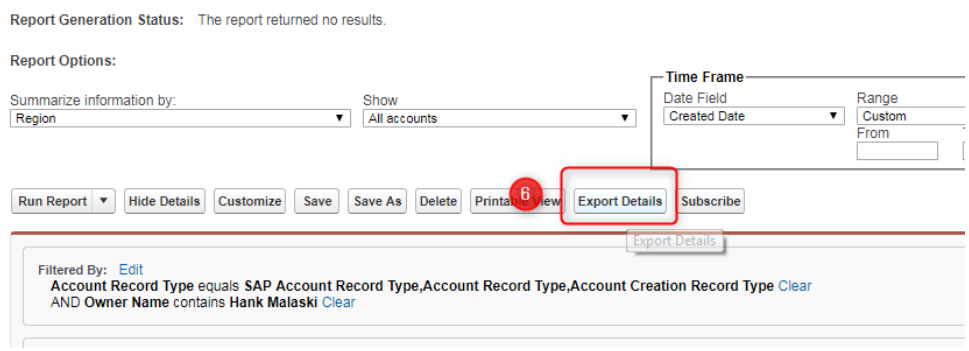
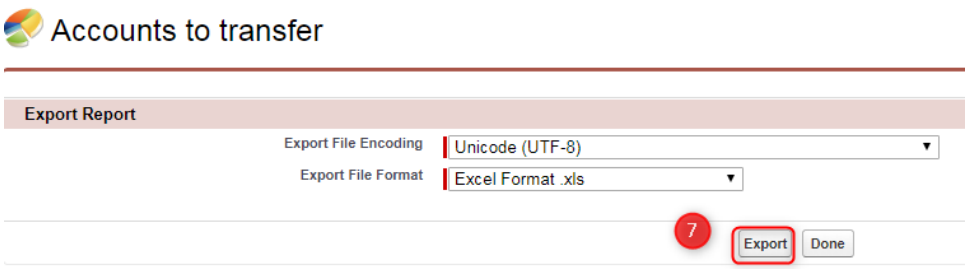
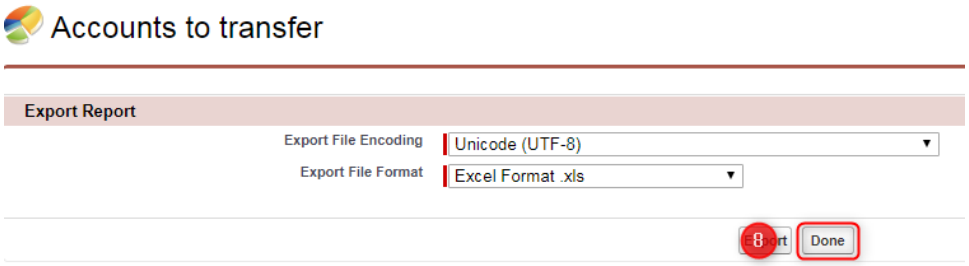
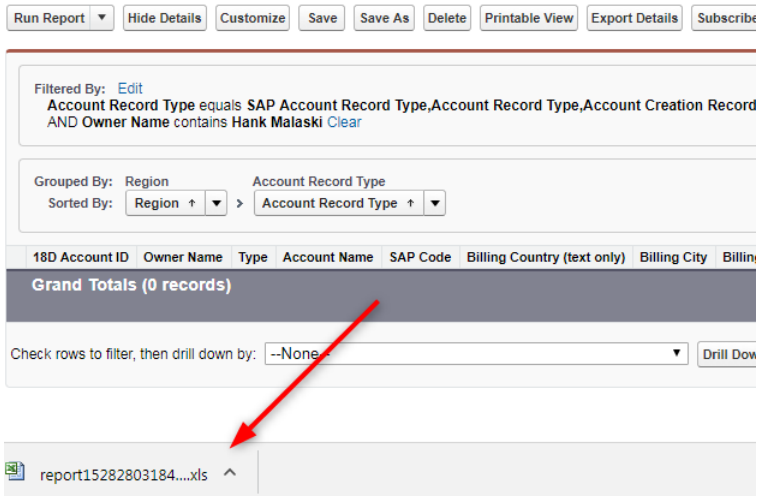
3.1	Uncheck the box 'Active'	
3.2	Ignore the warning; Click OK	
3.3	Save again	
3.4	• If Unable to Complete the Requested Change 1. check the reason 2. identify the field to update 3. go on the users page (on the far right of the screen) • Otherwise go to 3.5	
3.4.1	Slide down to "Additional Information" Section and empty the field named " Manager (HR Org Chart)"	

3.4.2	Save	
3.4.3	Uncheck "Active" box	
3.4.4	Save	
3.4.5	Ignore the warning	

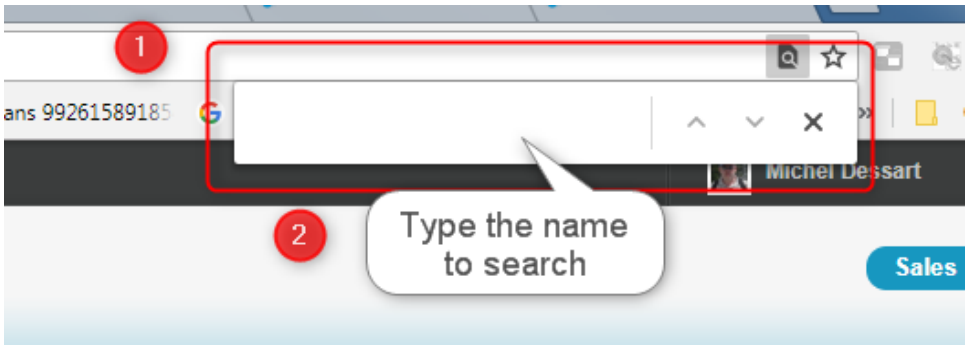
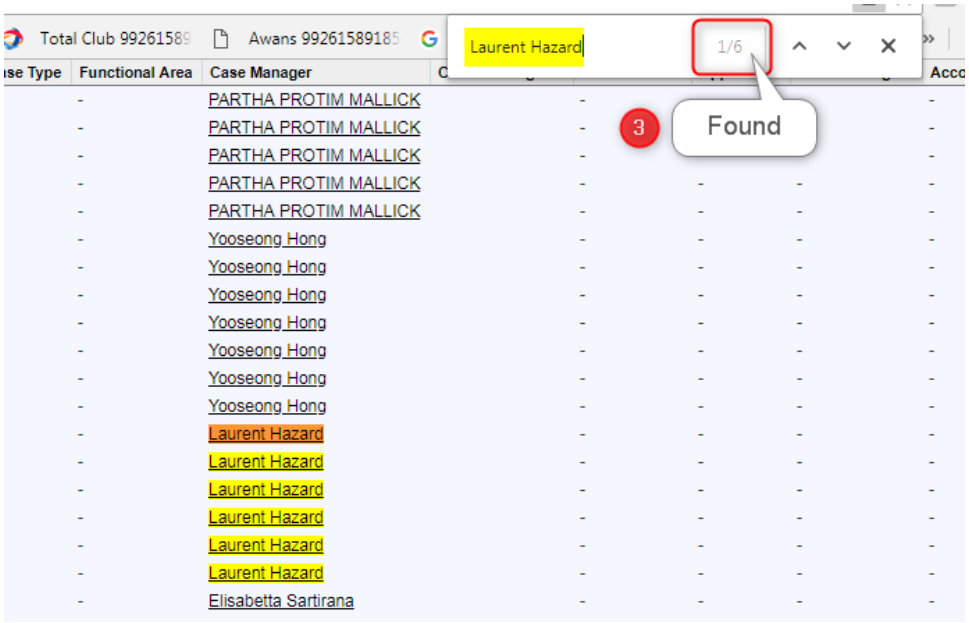
3.4.6	Uncheck Active box	
3.4.7	Save	
3.5	1. Check this box 2. Uncheck these boxes 3. Save	
3.6	Unfreeze Inactive User (because redundant with deactivated)	

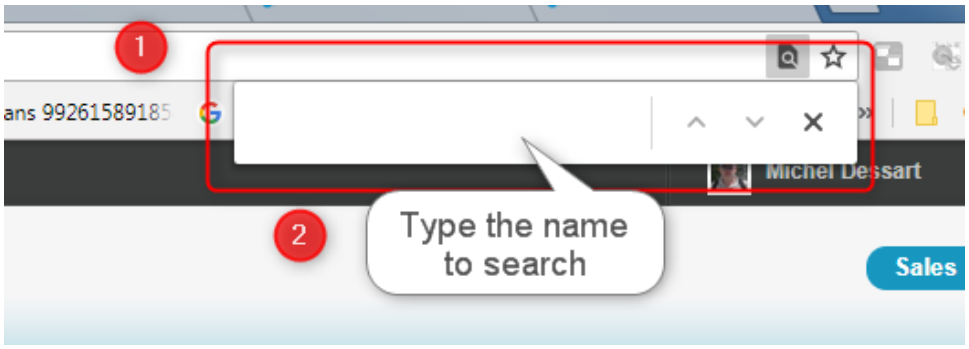
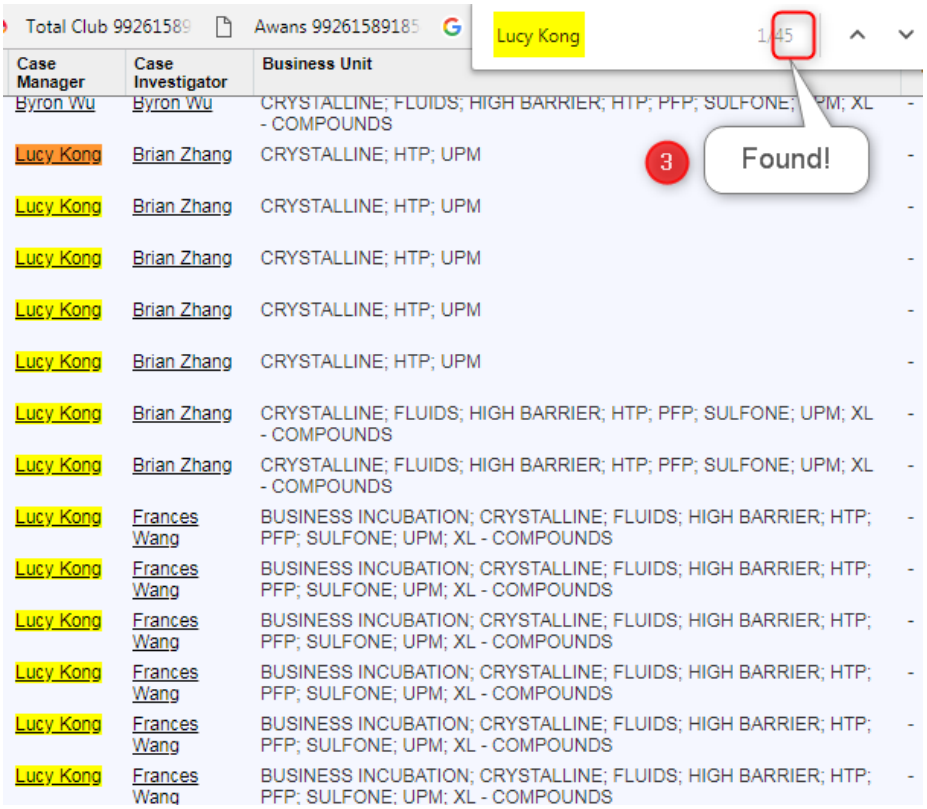
4	The next step is to remove the user from the installed packages (Grid Buddy) Go to Setup » Build » Installed Packages.	blocked URL
4.1	Search & Find	
4.2	Click on the button “Manage Licenses”.	
4.3	Remove License	
4.4	Ticket closure	Once you have removed the license, notify the requester via email that the user has been deactivated, and then close the ticket.

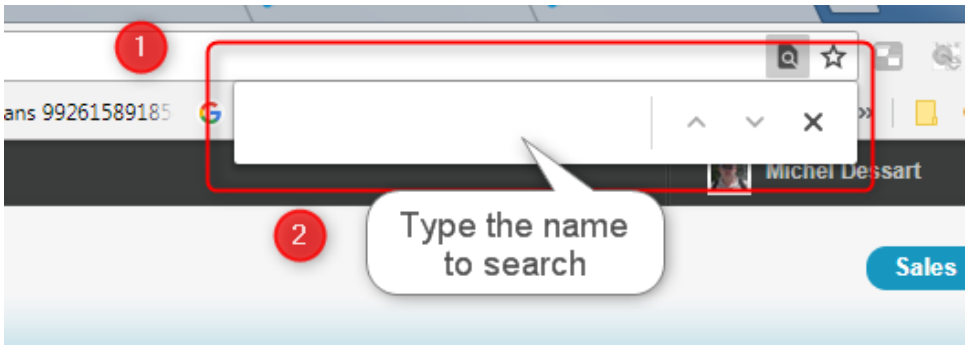
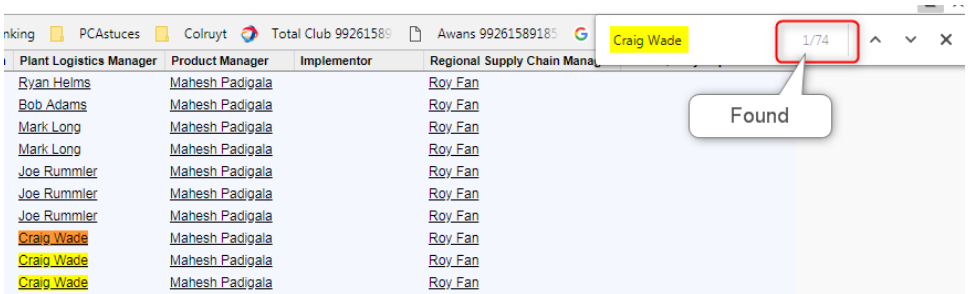
5	**Accounts to transfer**	**SpP Data Steward takes over from here. L1 support team's job is over.**
5.1	Identify the accounts	**SFDC Report : Accounts to transfer**
5.2	Modify Owner Filter	
5.3	In Filter section of the report : 1. Click on Edit 2. Hoover on the field and click "Edit" 3. Change the name 4. OK 5. Run Report 6. Export details 7. Export 8. Done	 ==========  ==========  ==========  ==========

		 ==========  ========== 
5.4	Report is downloaded on your computer	

5.5	Email report to manager (identified in point 2.1) and require the identification of new owner	
6	Opportunities to transfer	
6.1	Identify the Opportunies	**SFDC Report : Dev pool Opportunities to transfer**
6.2	Change Name in Owner filter; then proceed the same way as described before in points 5.2 5.5	
7	CTD Rep on Account Page	
7.1	Identify the Accounts with a CTD Rep	**SFDC Report : Accounts with CTD Rep**
	Change Name in CTD Rep filter ; then proceed the same way as described before in points 5.2 5.5	
8	TRS Case Routing Matrix	Open the report named **TRS Cases Routing Matrix** and search the presence of deactivated User

8.1	1. Activate the Search function, strike the 2 keys <Ctrl>+<F> of your keyboard 2. Type the name to search in the box (top right corner of your screen) 3. User found	 ========== 
8.2	Notify the Manager (As identified in point 2.1)	
9	Complaint Routing Matrix	Open the report named "**Complaint Routing Matrix**" and search the presence of deactivated User

9.1	1. Activate the Search function, strike the 2 keys <Ctrl>+<F> of your keyboard 2. Type the name to search in the box (top right corner of your screen) 3. User found	 ==========  Case Manager / Case Investigator / Business Unit Byron Wu / Byron Wu / CRYSTALLINE; FLUIDS; HIGH BARRIER; HTP; PFP; SULFONE; UPM; XL - COMPOUNDS Lucy Kong / Brian Zhang / CRYSTALLINE; HTP; UPM Lucy Kong / Brian Zhang / CRYSTALLINE; HTP; UPM Lucy Kong / Brian Zhang / CRYSTALLINE; HTP; UPM Lucy Kong / Brian Zhang / CRYSTALLINE; HTP; UPM Lucy Kong / Brian Zhang / CRYSTALLINE; HTP; UPM Lucy Kong / Brian Zhang / CRYSTALLINE; FLUIDS; HIGH BARRIER; HTP; PFP; SULFONE; UPM; XL - COMPOUNDS Lucy Kong / Brian Zhang / CRYSTALLINE; FLUIDS; HIGH BARRIER; HTP; PFP; SULFONE; UPM; XL - COMPOUNDS Lucy Kong / Frances Wang / BUSINESS INCUBATION; CRYSTALLINE; FLUIDS; HIGH BARRIER; HTP; PFP; SULFONE; UPM; XL - COMPOUNDS Lucy Kong / Frances Wang / BUSINESS INCUBATION; CRYSTALLINE; FLUIDS; HIGH BARRIER; HTP; PFP; SULFONE; UPM; XL - COMPOUNDS Lucy Kong / Frances Wang / BUSINESS INCUBATION; CRYSTALLINE; FLUIDS; HIGH BARRIER; HTP; PFP; SULFONE; UPM; XL - COMPOUNDS Lucy Kong / Frances Wang / BUSINESS INCUBATION; CRYSTALLINE; FLUIDS; HIGH BARRIER; HTP; PFP; SULFONE; UPM; XL - COMPOUNDS Lucy Kong / Frances Wang / BUSINESS INCUBATION; CRYSTALLINE; FLUIDS; HIGH BARRIER; HTP; PFP; SULFONE; UPM; XL - COMPOUNDS Lucy Kong / Frances Wang / BUSINESS INCUBATION; CRYSTALLINE; FLUIDS; HIGH BARRIER; HTP; PFP; SULFONE; UPM; XL - COMPOUNDS	
9.2	Record(s) found? 1. Notify Complaint Process Owner 2. Require the Process Owner to update the Routing Matrix	
10	SCR Routing Matrix	Open the report named "**SCR Routing Matrix**" and search the presence of deactivated User

10.1	1. Activate the Search function, strike the 2 keys <Ctrl>+<F> of your keyboard 2. Type the name to search in the box (top right corner of your screen) 3. User found	 ========== 
10.2	Record(s) found? 1. Notify Complaint Process Owner 2. Require the Process Owner to update the Routing Matrix	

Annex

Communication templates

#1 - User Replacement Information Request	Dear [Name of GBU User Responsible], We have been requested to deactivate [Name of User to be deactivated]'s access to the CORE CRM. However, his/her user is critical for some system customizations/functionalities. In order for us to proceed and ensure the appropriate actions are taken to guarantee correct system function, could you please indicate his/her replacement? Thank you in advance, CORE CRM Support Team