Incident Confidentiality

July 2017

Background

The Challenge

Some clients share a single instance of OSvC between departments. They need to have a 360 view of the customer but they also need to ensure that some of the information is obfuscated from the other teams (High Emotive issues or Financial Information)

The customer does **not** have workflows enabled which would obviously be the easiest solution.

Some of the teams are structured in such a way where an escalated issue can then only be seen by the team manager.

The Example

Client: Big Belly Burger

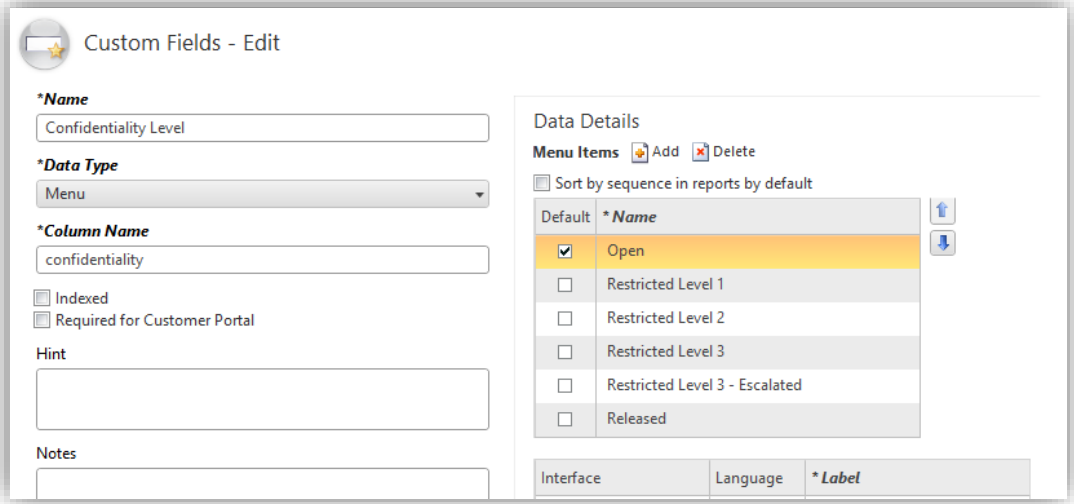
Confidentiality Levels:

Level	Reason	Agent Visibility
None	General Product Enquiries	All Staff
Level 1	Product Complaints	Quality Team
Level 2	Finance Enquiries	Finance Team
Level 3	Staff Complaints	HR, Management
Level 3, Escalated	Staff Disciplinary	Management

Custom Fields

New Custom Fields

Create a Menu type Incident Custom Field:



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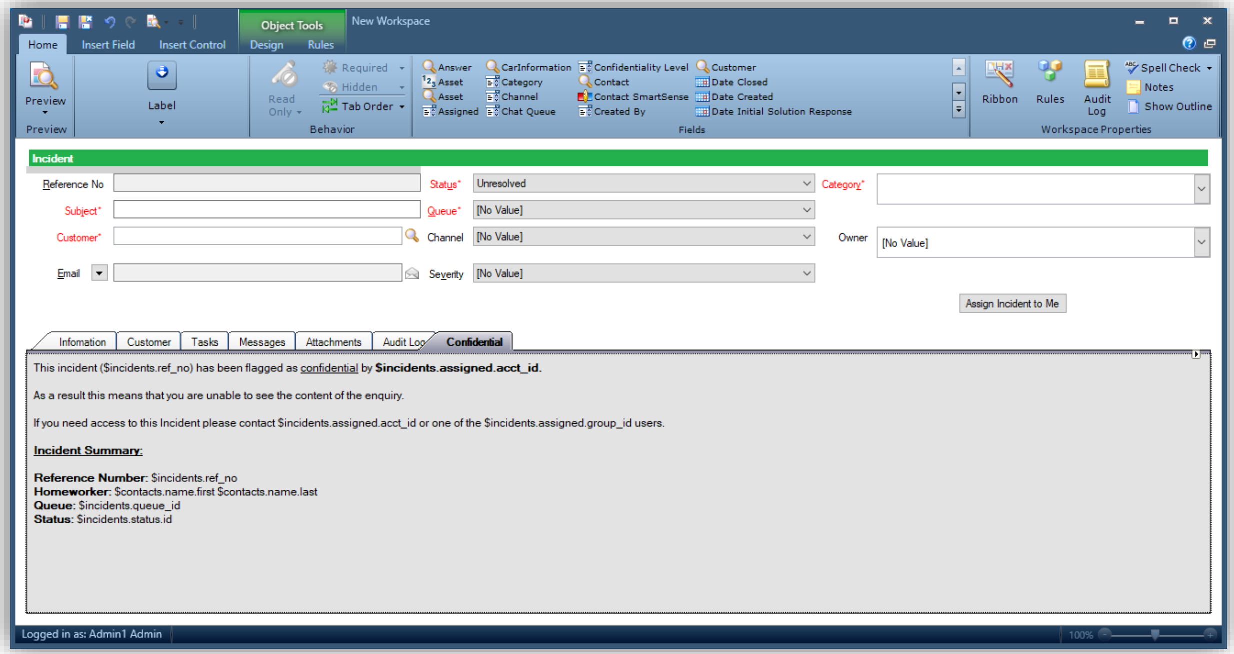
Incident Workspace

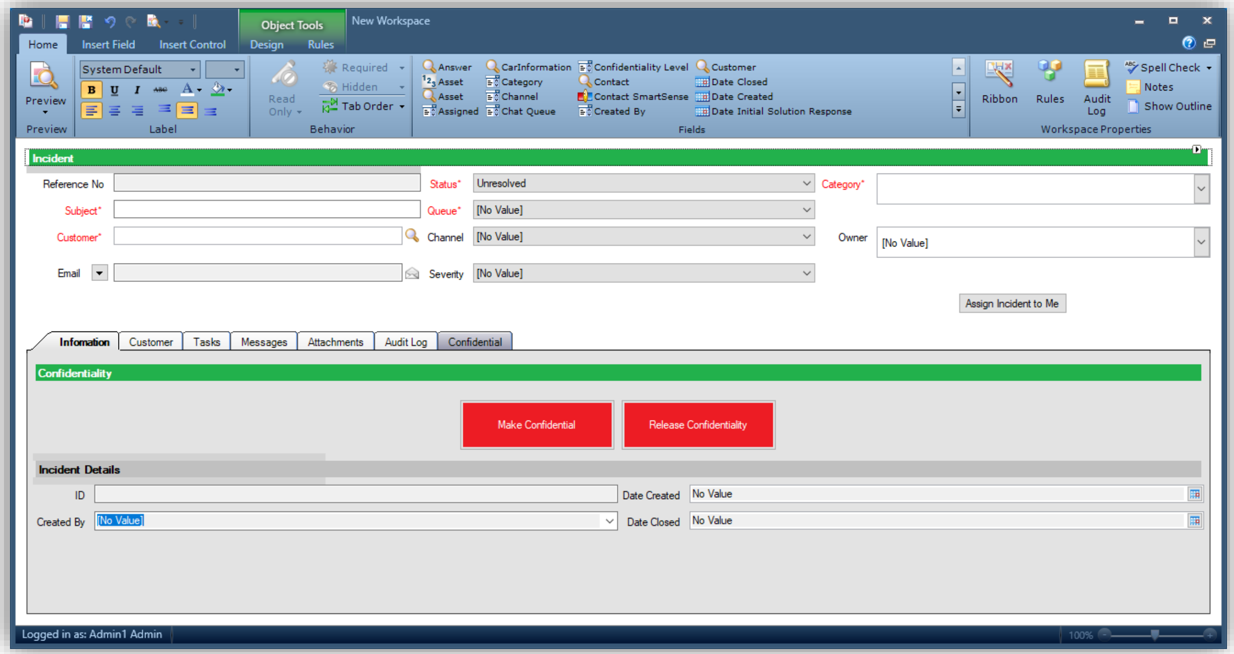
Add a Hidden Tab

Use merges to display the information that you want others to see



Add the Buttons

Create two buttons on the workspace. A confidentiality *On* and *Off* Button



Set Up Workspace Rules

Set up the rules in the workspace rules editor

Rules

Active	Name	When	If	Then	Else
	WS 0.1 Set Confidential (Level 1)	The editor loads	Queue in list Quality Control AND Confidentiality Level not in list Released	Set Confidentiality Level to Level 1	
	WS 0.2 Set Confidential (Level 2)	The editor loads	Queue in list Finance Team AND Confidentiality Level not in list Released	Set Confidentiality Level to Level 2	
	WS 0.3 Set Confidential (Level 3)	The editor loads	Queue in list HR AND Confidentiality Level not in list Released	Set Confidentiality Level to Level 3	
	WS 0.4 Set Confidential (Level 3 Escalated)	The editor loads	Queue in list Management AND Confidentiality Level not in list Released	Set Confidentiality Level to Level 3 - Escalated	
	WS 0.5 Set Confidentiality on Requeue (Level 1)	Queue changes	Queue in list Quality Control	Set Confidentiality Level to Level 1	
	WS 0.6 Set Confidentiality on Requeue (Level 2)	Queue changes	Queue in Finance Team	Set Confidentiality Level to Level 2	
	WS 0.7 Set Confidential (Level 3)	The editor loads	Queue in list HR AND Confidentiality Level not in list Released	Set Confidentiality Level to Level 3	
	WS 0.8 Set Confidential (Level 3 Escalated)	The editor loads	Queue in list Management AND Confidentiality Level not in list Released	Set Confidentiality Level to Level 3 - Escalated	
	WS 0.9 Set Confidentiality (Unrestricted)	The editor loads OR Queue changes	Queue not in list Quality Control, Finance Team, HR, Management	Set Confidentiality Level to Open	
	WS 1.0 Release Confidentiality	Release Confidentiality Button is clicked		Set Confidentiality Level to Released AND Hide Release Confidentiality Button AND Show Make Confidential Button	
	WS 1.1 Confidential: Level 1	Make Confidential Button is clicked	The logged-in account's profile in list Quality Control	Set Confidentiality Level to Level 1 AND Hide Make Confidential Button AND Show Release Confidentiality Button	
	WS 1.2 Confidential: Level 2	Make Confidential Button is clicked	The logged-in account's profile in list Finance Team	Set Confidentiality Level to Level 2 AND Hide Make Confidential Button AND Show Release Confidentiality Button	
	WS 1.3 Confidential: Level 3	Make Confidential Button is clicked	The logged-in account's profile in list HR	Set Confidentiality Level to Level 3 AND Hide Make Confidential Button AND Show Release Confidentiality Button	
	WS 1.4 Confidential: Level 3 - Escalated	Make Confidential Button is clicked	The logged-in account's profile in list Management	Set Confidentiality Level to Level 3 - Escalated AND Hide Make Confidential Button AND Show Release Confidentiality Button	
	WS 2.1 Hide on Confidential - Level 1	The editor loads	Confidentiality Level in list Level 1 AND The logged-in account's profile not in list Quality Control	Hide Reference # AND Hide Status AND Hide Severity AND Hide Subject AND Hide Queue AND Hide Category AND Hide Contact AND Hide Channel AND Hide Email AND Hide Type AND Hide Assigned AND Hide Infomation tab AND Hide Homeworker tab AND Hide Tasks tab AND Hide Messages tab AND Hide Attachments tab AND Hide Audit Log tab AND Show Confidential tab AND Hide Assign Incident to Me Button	
	WS 2.2 Hide on Confidential - Level 2	The editor loads	Confidentiality Level in list Level 2 AND The logged-in account's profile not in list Finance Team	Hide Reference # AND Hide Status AND Hide Severity AND Hide Subject AND Hide Queue AND Hide Category AND Hide Contact AND Hide Channel AND Hide Email AND Hide Type AND Hide Assigned AND Hide Infomation tab AND Hide Homeworker tab AND Hide Tasks tab AND Hide Messages tab AND Hide Attachments tab AND	

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Incident Reports

Hiding the information on Reports

A lot of reports will show the details of the incidents so you will need to go through each of the embedded reports and navigation set reports to hide the confidential information.

Each implementation of OSvC is different but some of the common reports are:

- Incidents by Contact
- Incidents by Organisation
- All Incidents
- Incidents by Queue
- All Queues
- My Queues
- Incidents Quick Search
- etc.

Hiding the information on Reports

Once you have identified the reports you will then replace each of the fields with an IF statement.

For Example: The Column Subject would be –

```
if(
    incidents.c$confidentiality IN (34,35,36,37),
```

the numbers represent the Custom Field ID

```
    'Confidential Record’,
```

the replacement text

```
    incidents.subject
```

the field to be changed

```
)
```