Course Overview

Join us for an immersive training focused on access within the Onspring platform. This comprehensive class will explore the various facets and considerations of access and security within Onspring, providing administrators with the knowledge to configure user access across multiple functionalities effectively.

During this bootcamp, participants will receive training materials and login credentials for a dedicated Onspring lab instance. We will guide you through an end-to-end configuration process where you will make key decisions related to administrative permissions, content and field security, and your end-user experience. Additionally, you'll have the opportunity to apply access principles to Onspring features such as Surveys, Workflow, and Portals.

Questions? Please email training@onspring.com.

Session Abstracts

Session I: Access Fundamentals

In this session we will review access-related concepts that were covered in Onspring Essentials training and expand on these basic principles. We'll take a closer look at the system apps (Users, Groups, and Roles) and their basic functions. This session lays the groundwork for building out an access plan and demonstrates the tools in the Onspring access toolkit.

Learning Objectives:

- Review fundamental access concepts and elaborate on these basics in more detail.
- Understand the properties of the Users, Groups, and Roles apps, and be able to interact with these components via the Admin panel or the content record.
- Identify vocabulary pertaining to users, roles and groups and portals.

Session II: App-Level Access

Explore how access control serves as the gatekeeper for your apps: from the broadest role and group-based permissions to content and field security rules. Learn how multiple access control features can be used in conjunction to secure apps and streamline layouts.

Learning Objectives:

- See how to grant role permissions at the app level
- Learn how to apply content security and field security to restrict access at dynamic and granular levels
- Consider conditional security needs and use cases

Session III: Role-Based & Group-Based Access Models

Explore the access model options further by delving into the specifics of roles and groups. This session will also differentiate between multi-role vs. multi-group approaches and encourage administrators to consider the pros and cons of each for their use case. This session will also cover administrative roles, such as System, Content, and Workflow Administrators, in more depth.

Learning Objectives:

- Understand and distinguish between role and group-based access models
- Identify areas of the platform where role or group access is required
- Identify and configure System, Content, and Workflow Administrators appropriately

Session IV: Access & User Experience: Portal & Beyond

This session will focus on the user experience in Onspring. We'll demonstrate how to guide end users effectively to a desired outcome using a combination of access principles, Onspring functionalities that promote ease of use, and functional design strategies. Additionally, we will explore the distinct portal user experience in depth, providing valuable insights into this powerful feature.

Learning Objectives:

- Compare and contrast access and user-guidance principles
- Learn the key differences between full user and portal user experiences
- Utilize both user guidance principles and access control to drive user behavior
- Identify Onspring UX-enhancing features

Session V: Access in Action

Watch access control come to life as we walk through a process that includes multiple sets of stakeholders. This session will include automations in Onspring features like surveys and workflow to demonstrate how they work together when access is configured thoughtfully.

Learning Objectives:

- Understand and engage with access layered with other Onspring features

- Learn how to define access within a portal experience

- Learn how to appropriately configure access within survey and workflow processes

- Understand how to develop an access plan using a menu of options

Session VI: Access Best Practices

We'll outline "need-to-knows" for access considerations in Onspring. These will include tips and tricks for establishing and maintaining an access model, points of caution for access, and a few instance-level access options.

Learning Objectives:

- Understand the best practices for access configuration and be equipped with the initial questions needed to build a successful access model

- Practice creating an "access plan" for your process, utilizing a menu of options

- Discover resources available for continued learning, including API setup, SSO availability, password security, and instance-level access