

HelloID  
2021



# HelloID

## MSP OVERVIEW

IT and Service Automation for  
Managed Service Providers (MSP)

# Index

<b>Smart in the Future: Helpdesk Automation</b>	<b>3</b>
How Do You Do That?	3
<b>User Provisioning: Automated IT Management</b>	<b>7</b>
100% Automation	7
Elevated IT Service & Added Value	8
Reclaimed MSP Bandwidth	8
Logged Activity	8
Everyone Wins	8
<b>Simplify IT Management: Automate &amp; Delegate</b>	<b>9</b>
Service Automation with Dynamic Forms	9
Implementation	9
Follow-up	10
Focus on IT Innovations, Not Manual Processes	11
Self-Service Workflows & Service Automation	11
Self-Service Webshop	12
<b>Digital Workplace with Cloud Access Management</b>	<b>13</b>
Optimal Agility with Cloud Single Sign-On for Your Digital Workplace	14
Contact Us	15
Tools4ever's Complete Range of IDM Solutions	15

# Smart in the Future: Helpdesk Automation



Today, companies can rely on the fact that their managed service providers offer the latest and most efficient services combined with modern technologies and the best price-to-performance ratio. In the ongoing collaboration, suggestions for improving the company's own productivity, efficiency, and safety are expected.

As an MSP, you are always looking for ways to optimize your processes. You must use IT automation to optimize your IT administration effort, reduce costs, and, at the same time, increase your service level and customer satisfaction.

## How do you do that?

### 1. User Provisioning

HelloID fully automates user provisioning. Automation reclaims significant IT management bandwidth. HelloID detects changes in source systems (e.g., new users) and executes the configured provisioning processes accordingly. This solution automatically manages account creation, group memberships, and assigned permissions based on the user's role and attributes. HelloID guarantees your customers timely, consistent, and error-free provisioning services

### 2. Service Automation with Dynamic Forms:

Service Automation simplifies and automates the maintenance of user accounts or the allocation of authorizations and access to IT resources, programs, folders, and files for the helpdesk. The automation of user and authorization management reduces both the workload of the helpdesk and the qualification requirements for the employees. The helpdesk is relieved and can serve more customers with the same staff. In the end, the entire process becomes more effective and efficient. Your service level increases significantly.

### 3. Service Automation with Self-Service and Workflow for Your Customers:

You can further increase your service level while reducing costs by offering your customers a product portal with self-service and workflow functionality. Your customers' employees can then independently apply for authorizations, applications, resources, etc., and have them approved by your line manager. Service Automation carries out the changes directly and automatically in the network without your helpdesk having to intervene. Your customers will be impressed by this exceptional service!

### 4. Digital Workplace:

Your customers will be thrilled if they can use the services you offer regardless of device and location. HelloID offers a web-based dashboard for your SaaS and intranet applications, including a single sign-on functionality. Legacy applications are accessible via Citrix technology. Using self-service and workflows, users can request access to resources and have them approved by their line manager. The changes are carried out automatically in the network or in the Cloud Service Automation. User provisioning offers automated on- and offboarding for the dashboard. Multifactor authentication (MFA) also guarantees you a secure login process.

In a competitive environment, it is crucial to create added value through innovative solutions and to differentiate yourself from the competition. Through creative ideas and solutions, you can become a thought leader in your market and we, at Tools4ever, will accompany you. Our customers have valued and trusted us for 20 years.

## Provisioning



### Your organization now

Manual efforts to create, provision, and manage accounts and access remain excessively time-consuming.

### With Tools4ever

HelloID automatically syncs identity and provisioning data with connected systems, applications, and resources. Source system changes (e.g., new user) trigger configurable provisioning processes and updates.

### Result

100% automated user provisioning, reclaiming bandwidth while ensuring consistent, error-free, and logged processes.

## Productivity



### Your organization now

Your business is successful. However, your IT resources are limited, making it challenging to keep up with new or existing customers.

### With Tools4ever

With an automated helpdesk, you can save up to 80% of the resources required to process tickets. In the case of self-service, up to 97%.

### Result

Immediate increase in productivity.

## Service-level agreement



### Your organization now

Helpdesk requests are processed manually. Your Service-Level Agreement may be compromised.

### With Tools4ever

Helpdesk requests are processed automatically, which leads to considerable time savings.

### Result

Up-to-date and satisfied customers.



## Digital workplace



**Your organization now**  
Lack of a user-friendly dashboard.

**With Tools4ever**  
A user-friendly dashboard that provides:

- ✓ Access and single sign-on capabilities for all SaaS and network applications.
- ✓ Automated on- and offboarding access policies.
- ✓ MFA for additional security.

**Result**  
A dashboard that meets modern technology requirements.

## Resources



**Your organization now**  
Manual ticket processing requires perfect knowledge of the native tools for managing the infrastructure.

**With Tools4ever**  
With an automated helpdesk, you only need to know the basics. Administrative tools are replaced by forms. The Tools4ever engine does the rest.

**Result**  
Easier hiring and onboarding process.

## Security



**Your organization now**  
Employees may have elevated rights beyond what they need, and may not create a log of their changes.

**With Tools4ever**  
With an automated helpdesk, employees only have access to customer-specific forms. Only the Tools4ever engine needs administrative rights. All changes are logged.

**Result**  
Reduced security risks and an audit trail.



## Training



### Your organization now

When the tickets are processed manually, the employees must be instructed and trained in the customer's processes. These training courses can last up to 1 week.

### With Tools4ever

With an automated helpdesk, the customer processes are configured in the forms. Forms training takes less than a day.

### Result

Personnel management is simplified. Employees can switch from one customer to another more easily.

## Example for 20,000 tickets per year



### Your organization now

- ✓ 1,000 creation / deletions
  - ✓ 1,000 changes
  - ✓ 5,000 password reset requests 13,000 Access rights
- Approx. 1,900 hours / year

### With Tools4ever

- ✓ Automated Helpdesk: Approx. 600 hours/year
- ✓ Self-service: Approx. 150 hours/year

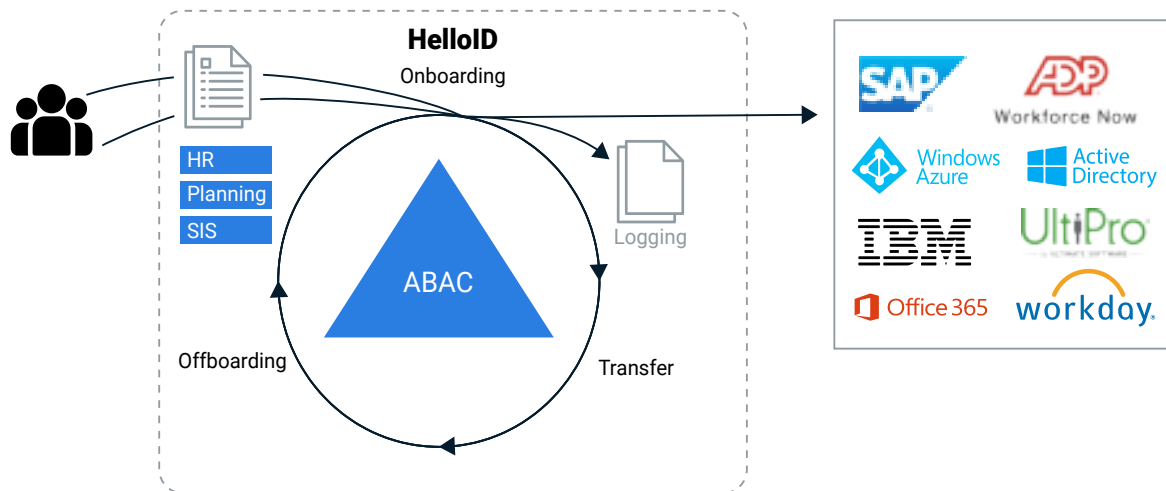
### Result

- ✓ Automated helpdesk: up to 68% more savings
- ✓ Self-service: up to 92% more savings

# User Provisioning: Automated IT Management

Do you spend too much time on your customers' provisioning needs? Delivering top-level IT services grows more challenging with time-consuming identity management tasks. Each new user requires account creation, group memberships, and permissions. Manually executing these tasks may take 30 minutes or more per user once started.

Timely, consistent, and error-free processes are crucial when providing your customers with IT services. HelloID guarantees your provisioning at the highest professional level to ensure customer satisfaction.



## 100% Automation

HelloID fully automates your provisioning services for customer organizations. Once the process is configured, HelloID syncs user data and attributes from connected “source systems” (e.g., HR or SIS systems). HelloID automatically detects new users or changes to existing users. Based on each user’s identity data, HelloID automatically creates accounts, adds group memberships, and assigns permissions for all other connected resources.

HelloID pulls “attributes” for each user from the connected source system. These attributes determine which established “business rules” apply to a user. Based on the applicable “business rules,” the user receives “entitlements” (e.g., accounts, group memberships). The combination of attributes, business rules, and entitlements determines “who gets what” whenever automated provisioning processes are executed.

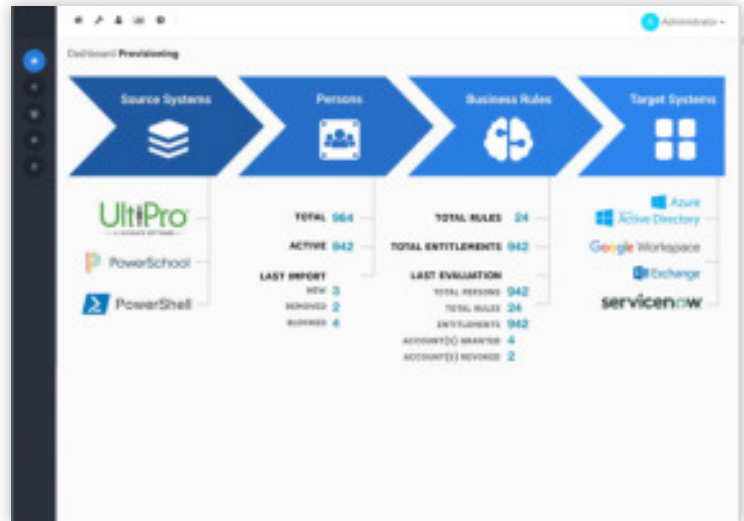
HelloID achieves full provisioning automation via connectors. For many common systems, applications, and other IT resources, there are dedicated connectors available. For those resources without dedicated connectors, HelloID leverages universal methods (e.g., PowerShell) for virtually limitless integration possibilities. Regardless of your customers’ IT environments, HelloID makes fully automated provisioning possible.



## Elevated IT Service & Added Value

You and your customers thrive on elevated IT services and added value. When a customer organization submits a request to create and provision a new user, how long does it take for that task to get started?

Automated provisioning is more than just minimizing processes; it's also about immediate results. Because HelloID automatically runs its configured provisioning processes upon detected additions or changes, there are no delays between customers submitting requests and task execution. HelloID inherently boosts service levels simply because there is no waiting for results.



With automated provisioning, HelloID handles your customers' identity management rapidly and consistently. As each process runs according to its configuration, you can guarantee your customers an error-free execution. HelloID's automated provisioning is perfect for MSPs. Your customer organizations no longer have to suffer significant employee downtime due to provisioning and update delays with HelloID's immediate processing.

## Reclaimed MSP Bandwidth

What happens if you begin leveraging HelloID's automated provisioning? With automated process execution, your staff reclaims significant bandwidth that would otherwise be spent on manual management. Adding another professional service to your offerings is great, but minimizing the delivery effort is even better. With so much reclaimed time and effort, your company can expand its client base or begin to offer more IT services than before.

## Logged Activity

With HelloID, all process executions are logged and recorded in audit trails for your customers. This data remains readily available for demonstrating regulatory compliance or generating insightful reports. Not only can you provide customers with full logs of recorded tasks and changes, but do so with little effort.

HelloID's business intelligence capabilities provide further benefits by demonstrating your services' value with hard data. For example, each customer could receive a generated report to outline how many processes and tasks occurred each month within their environment to demonstrate the cost savings your services achieve.

## Everyone Wins

HelloID's provisioning helps ensure that both you and your customer's organizations win. Customers benefit from rapid provisioning automations that deliver consistent results. HelloID minimizes not only the time and effort spent on provisioning tasks but any delay for queued requests. IT services increase while the effort to provide them decreases.



# Simplify IT Management: Automate & Delegate

## Service Automation with Dynamic Forms

HelloID's Dynamic Forms empower your employees and customers by making management and request processes easier than ever. HelloID achieves this via the solution's PowerShell engine and external APIs. Dynamic Forms eliminate tedious, labor-intensive user management for admins, help desk employees, and even end users with the ability to rapidly make or request changes in your network, target systems, and HelloID itself.

### Implementation

HelloID's Dynamic Forms provides all authorized users with the ability to perform administrative tasks and processes, regardless of their prior technical knowledge. Lengthy tasks in user administration and provisioning, which normally require in-depth administrator knowledge, can now be easily carried out via the HelloID portal. Thanks to the simplified user interface, your administrators can not only manage user data faster than ever before but can also delegate tasks to your helpdesk staff or other users without having to assign administrative authorizations. The self-service module even enables your customers to send, approve, and then process requests for applications, file releases, or device logouts via forms.

With Dynamic Forms from HelloID, your IT administrators receive a solution that ensures uniform and automated user and authorization management. As soon as a form is submitted, HelloID automatically runs the process according to the specified settings. For example, a manager can grant his employee access to a specific application or file share at any time using Dynamic Forms. Likewise, your customers' employees can request resources themselves using the self-service form entries. Applications may need to be authorized before processing. In this case, they will be forwarded to the user's manager or the corresponding "resource manager" for approval or rejection.

### Creation

With HelloID, your administrators and IT staff can intuitively create customized forms for all types of processes. To do this, form components (e.g., input field, grid, checkbox, dropdown list) may be added to a form through an intuitive drag-and-drop interface. Each component can be customized with validation rules, data source connections, and more.

Tools4ever offers some ready-to-use scripts for general processes, but administrators can also create all scripts for any task. The way it works is based on the fact that information from data sources and external APIs are integrated into form components via PowerShell scripts: This happens in real time as your customers fill in the respective fields. And that is what makes the solution so dynamic. The results are then filtered based on the data entered in the form. Suppose one of your administrators wants to see which group memberships have been assigned to a particular user. Then he simply enters the name of the user in the field provided and immediately receives a filtered list for selection with which he can now carry out further actions.

### Follow-up

HelloID automatically logs all administrator and user activities for a better management overview, user tracking, and audit purposes. If a dynamic form is submitted and the corresponding process is carried out, HelloID saves a record of the activity, which contains the user, action, date, and time. Administrators can then use the reports that are generated to review these actions for network security and regulatory compliance. HelloID gives an insight into who accessed what, and Dynamic Forms offers administrators the possibility to make changes quickly if necessary. Finally, both you and your customers can keep an eye on their self-service requests to track their progress.

# Focus on IT Innovations, Not Manual Processes

## Self-Service Workflows & Service Automation

The HelloID Employee Self-Service Workflows are a real ticket killer for your company. You delegate authorization management to managers or product owners at your customers and set up individually designed approval workflows. Your customers request access to applications, resources and data themselves using a product catalog without burdening your IT.

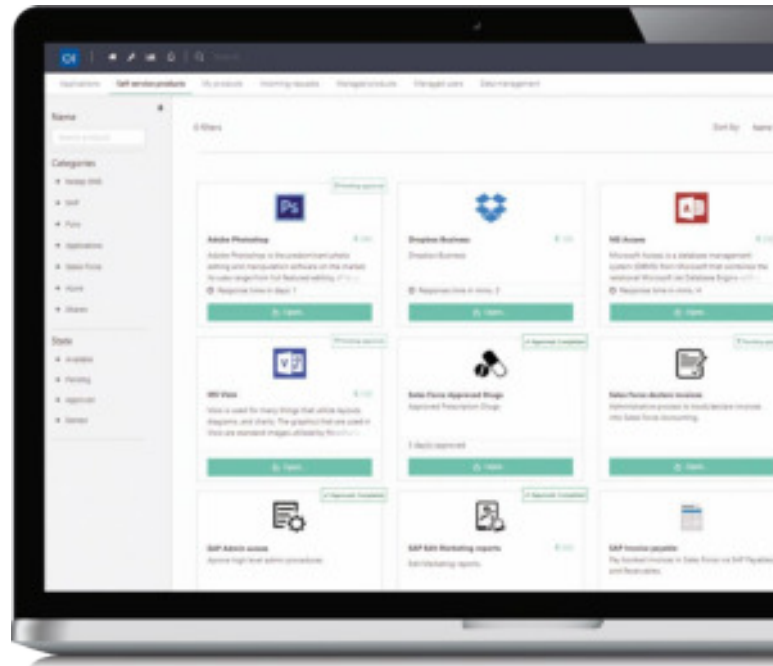
After approval by the manager or product owner, changes are automatically transferred to the customer's IT infrastructure and logged thanks to Service Automation. Self-service and automation with HelloID significantly reduces the workload for your helpdesk and contributes to the professional image of your IT department and your company.

# TRONOX

“The powerful combination of HelloID Service Automation and TOPdesk leads to greatly simplified management processes and a stronger focus on innovation.”

Rick Davies, IT manager at Tronox

*Source: Tools4ever case study*



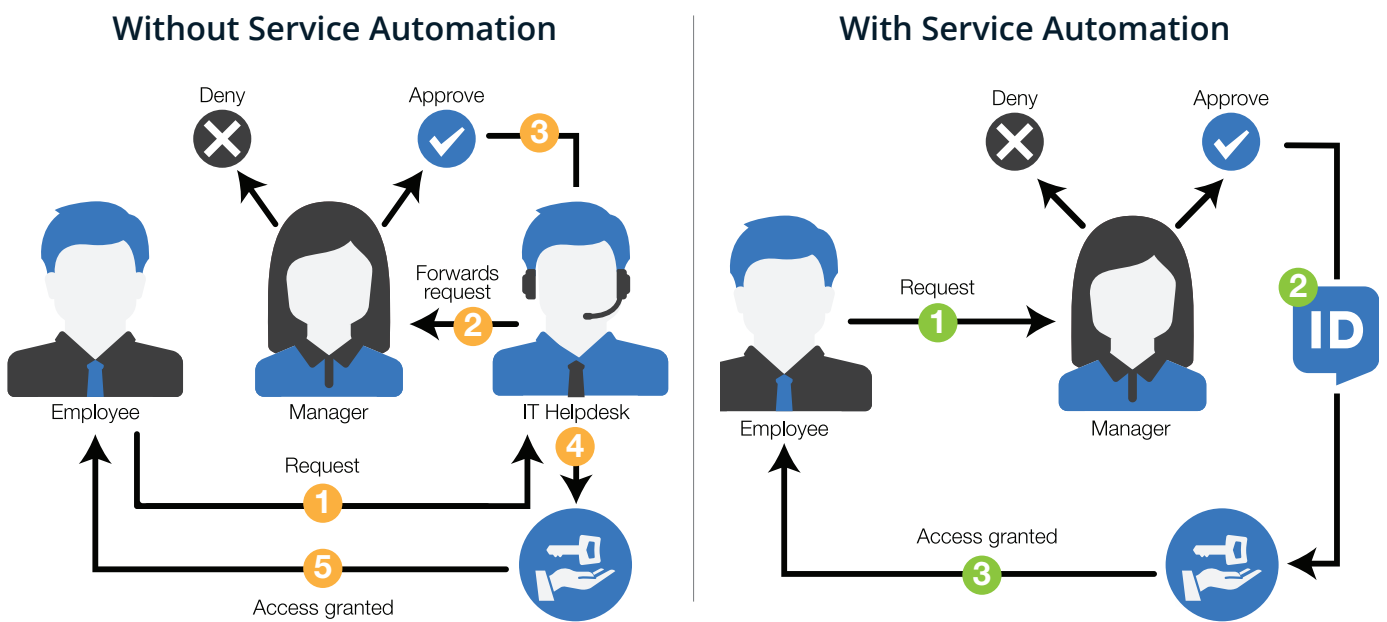
# Self-Service Webshop

HelloID offers your customers a clear catalog of all available applications, authorizations and resources, comparable to an intuitive webshop, and combines this with the Service Automation function. Employees can request the desired products with a click of a button, and their request is submitted to their manager or the product owner for approval.

The requests are carried out 100% automatically without the intervention of an IT employee in the network. Service Automation thus ensures a simple, fast, and user-friendly approval process for employees, managers, and the IT helpdesk.

HelloID offers you standard software that you can configure individually according to your customers' needs. Multi-stage workflows are possible, including email notifications and the integration of substitute approvers, as well as groups instead of individual users.

Thanks to HelloID's comprehensive application programming interface (API), you can rapidly create and manage products for your customers' environments. No need to manually log in to each tenant!



# Digital Workplace With Cloud Access Management

Your customers want to access your applications regardless of device or location. As a managed service provider, you are responsible for secure and regulated access to your customers' cloud applications. But how can you ensure correct and controlled access?

With the HelloID Access Management module, your customers receive a personalized dashboard with access to their applications and data, regardless of device or location.

The HelloID dashboard provides quick access to SaaS and intranet applications through a myriad of single sign-on protocols.

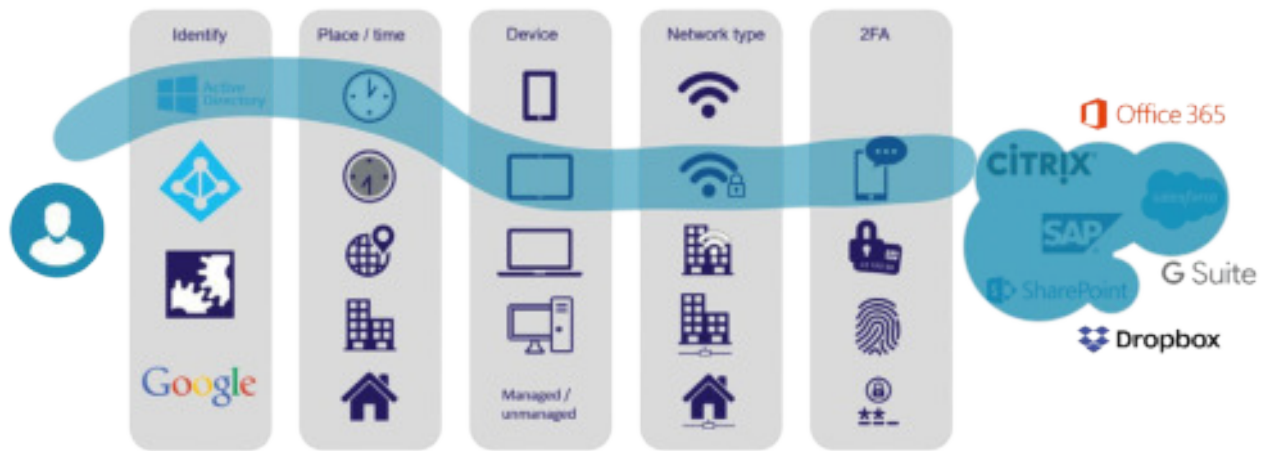
HelloID enables and logs a consistent and uniform registration process with configurable access policies (based on, e.g., location, IP, time, etc.) and multifactor authentication (RADIUS, FIDO2, OATH, push-to-verify app, Google/Windows authenticator, SMS, email).

## The advantages at a glance:

- ✓ Ease-of-use thanks to Digital Workplace with SSO.
- ✓ Increased security thanks to MFA and access policies.
- ✓ Cost savings on MFA functionality by using more affordable licenses or security tokens, if your user does not have a company cell phone.
- ✓ Use Active Directory as an IdP without ADFS.
- ✓ Automated on- and offboarding.
- ✓ Seamless integration into your social intranet.



Authentication method example: YubiKey

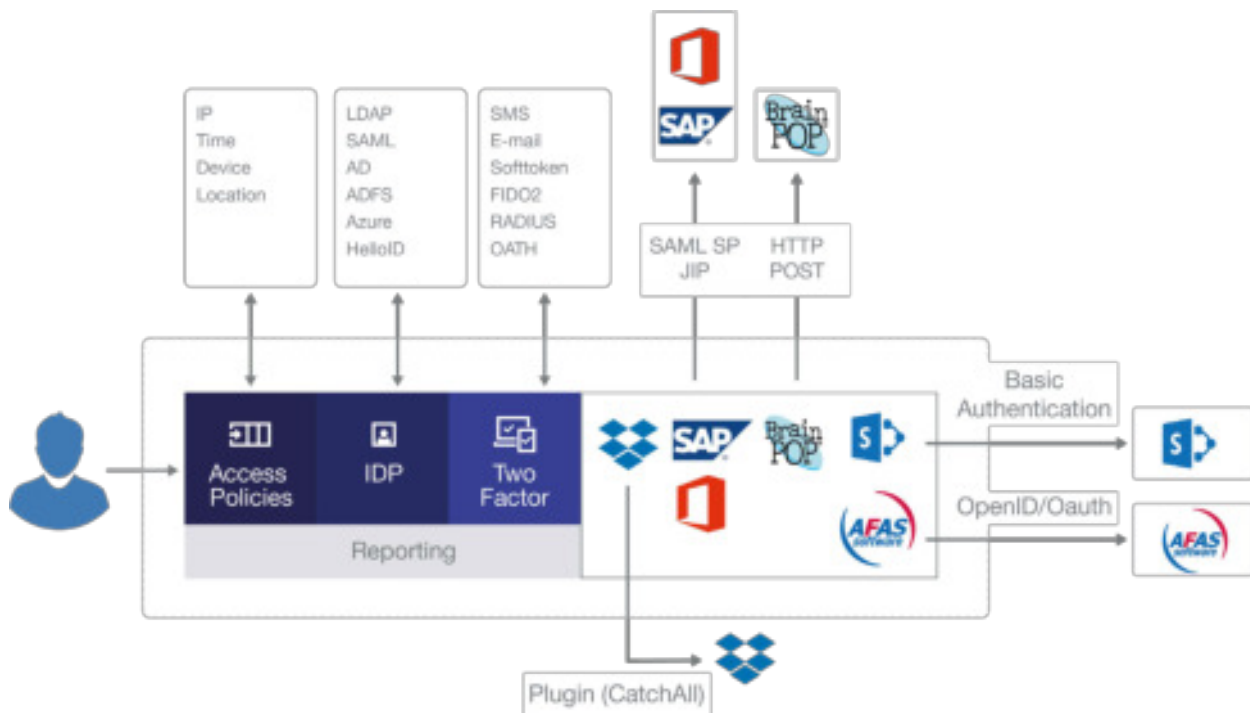


Secure access through individually configurable access policies

## Optimal Agility with Cloud Single Sign-On for Your Digital Workplace

HelloID supports all common SSO protocols for the automatic identification and authentication of users and allows the integration of all cloud-based applications (e.g., Office 365, Outlook Web Access, Adobe, Citrix, SAP, Salesforce). In addition, HelloID can be seamlessly integrated into a social intranet software or your customer service management system (e.g., ServiceNow, TOPdesk).

In this way, you can offer your customers a holistic service experience and significantly reduce your IT workload. The low cost and minimal administrative overhead of an IDaaS tool are not at the expense of control and security. On the contrary, HelloID runs in a highly secure Azure environment. This ensures compliance with the strictest security requirements.



All common SSO protocols are supported by HelloID.

## Contact Us

For 20 years, Tools4ever has helped organizations of all industries and sizes by optimizing our partners' processes, user account management, and security. From automatically creating new user accounts to ensuring employees log into resources securely, Tools4ever is committed to leveraging your IT resources into impactful, reliable solutions.

For more information regarding Tools4ever's Identity Governance and Administration solutions, please contact our team at [nwsales@tools4ever.com](mailto:nwsales@tools4ever.com) or [nainfo@tools4ever.com](mailto:nainfo@tools4ever.com).

To learn more about Tools4ever's Identity Governance and Administration (IGA) solutions and consultative expertise, please visit [tools4ever.com/resources](https://tools4ever.com/resources).

## Tools4ever's Complete Range of IDM Solutions Includes:

- ✓ HelloID (Cloud-Based IDaaS & SSO)
- ✓ Identity and Access Manager (IAM)
- ✓ Self-Service Reset Password Manager (SSRPM)