Customer Onboarding Plan

Last updated by | Erik Ralston | Sep 1, 2022 at 6:23 AM PDT

This article provides the high-level steps for onboarding a customer organization. It targets a technical audience that is preparing for their initial production deployment of Soundbite.AI. For more detail or help troubleshooting, please contact Support@Soundbite.Freshdesk.Com.

Background

By the time these steps are undertaken, the customer should understand the product and its capabilities. They should be committed to piloting the product and a signed agreement should exist between them and Soundbite, Inc.

Region

The first step is to select a region for their deployment. This allows for not only performance-optimized collocation but enables data sovereignty concerns (like GDPR) to be managed. Right now, the following regions are available:

Name	Azure Region	Backup Region
North America	US West 2	West Central US

Backup Regions pair the Geo-Redundant Storage (GRS) and Azure SQL Database data to ensure continuity for Disaster Recovery (DR).

Deployment Style

There are two deployment styles for Soundbite. Usually an organizations starts with light touch, then progresses to a full deployment:

Light Touch Deployment

Some customers - especially during a trial period - can start using Soundbite in its "light touch" mode where each user accesses the app and grants it access to their own profile individually. Generally, this allows for viral growth amongst a dedicated group of early adopters who invite each other by e-mail and manually manage participation in the platform.

It is not a scalable approach, but it enables customers to trial the product in minutes for organizations who use the default permissions of AAD allowing third-party apps that do not ask for permissions that default to "admin consent required".

Full Deployment

The full deployment of Soundbite allows administrators to go beyond the direct administration of users and roles, but dive into the synchronization of directory information to allow specific groups or even the whole

organization to join Soundbite automatically. This always requires granting admin access (see below).

Azure Active Directory

The following are instructions and concerns when deploying an organization that uses Azure Active Directory (AAD). This includes key descriptions and screenshots for touchpoints between Soundbite and AAD, plus some general advice on enabling services.

Active Directory Permission Request

Under the "light touch" deployment for an organization with Azure Active Directory, each user must accept a permission request from the Soundbite platform before they can access the system. It looks like this:

Microsoft

erik@soundbite.ai

Permissions requested

Soundbite
Soundbite Inc. ✔

This app would like to:

∨   Maintain access to data you have given it access to

∨   Sign in and read user profile

☑   Consent on behalf of your organization

If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. You can change these permissions at https://myapps.microsoft.com. Show details

Does this app look suspicious? Report it here

Cancel   Accept

For administrators, the highlighted checkbox will appear. If checked, it grants access to the whole organization and other users will NOT have to see this dialog. Before checking this box, most large organizations will want a thorough review of Soundbite's capabilities and security.

Active Directory Permissions

Soundbite requests the following permissions for the individual user, each of which are critical in the operation of the platform:

API Name	Permission	Type
Microsoft Graph		
Microsoft Graph	View users' email address	Delegated
Microsoft Graph	Maintain access to data you have given it access to	Delegated
Microsoft Graph	Sign users in	Delegated
Microsoft Graph	View users' basic profile	Delegated
Microsoft Graph	Sign in and read user profile	Delegated

None of these require admin access to grant and they only include basic profile information. Once access is granted, the following information for a user's profile is shadowed for the current user based on directory information:

Field	Description	Example
Unique Identifier	Required: In AAD, this is the Object ID of the user	975D3967-9CFA-44F2-95AF-3D453DE406DA
Email	Required: The unique email address for the user; targets messages for the platform	Alice@Foo.Bar
Given Name	The first name of the user	Alice
Family Name	The last name of the user	Smith
Phone Number	The phone number for the user; drives SMS notifications if that feature is enabled for the tenant	123-456-7890
Title	Job title for the user	Chief Zoology Officer

All of these fields are encrypted in transit by TLS 1.2 provided via Azure Front Door ⃞ using an Azure-managed SHA256 certificate. They are encrypted at rest by Transparent Data Encryption (TDE) in Azure SQL Database ⃞ using Azure-managed AES256 encryption. They are store in the region of your choice above, For more information on security, see our "Technical FAQ" documnent.

Soundbite Enterprise App in Azure Active Directory

After the first user in an organization accepts permissions for the application, administrators in Azure Active Directory will begin seeing the application under the "Enterprise Applications" list like so:

Enterprise applications | All applications

Soundbite Inc. - Azure Active Directory

+ New application   ☰ Columns   ⊡ Preview features   ⊗ Got feedback?

Overview

ⓘ Overview

ℹ Try out the new Enterprise Apps search preview! Click to enable the preview. →

✗ Diagnose and solve problems

Application type	Applications status	Application visibility		
Enterprise Applications ⌄	Any ⌄	Any ⌄	Apply	Reset

Manage

🔲 All applications

🔍 soundbite|

🔧 Application proxy

Name	Homepage URL	Object ID	Application ID
🔷 Soundbite	https://soundbite.ai/	18738e86-3ab2-4da4-a848-3d9cb4dba9cf	2274e9f2-89b3-4a1b-aa01-f7b0af1900cb

⚙ User settings

This allows them to view permissions, grant org-wide admin access, and even delete the application. Keep in mind that while one can see the permissions in the system, they cannot be partially disabled. Removing any of them will cause degradation of the Soundbite service for the organization.

Granting Admin Access

To grant organization-wide admin-level access to the Soundbite application in AAD, simply open its entry in the Enterprise Applications blade in the Azure portal and click the "Grant Admin Consent for Soundbite, Inc" button:

☰   Microsoft Azure   🔍 Search resources, services, and docs (G+/)

Soundbite API - Preview | Permissions ⋯
Enterprise Application

《   ↻ Refresh   ✓ Review permissions | ⧉ Got feedback?

▲

🔲 Overview

📖 Deployment Plan

Manage

‖ Properties

👥 Owners

👤 Roles and administrators
   (Preview)

👥 Users and groups

⊃ Single sign-on

◎ Provisioning

🔲 Application proxy

☯ Self-service

Security

🔲 Conditional Access

🔲 Permissions

🔲 Token encryption

Activity

⊃ Sign-ins

Permissions

Applications can be granted permissions to your tenant by an admin consenting to the application for all users (Admin conse
enabling self-service access or assigning users directly to the application. As an administrator you can grant consent on behal
button below to grant admin consent.

As an administrator you can grant consent on behalf of all users in this tenant, ensuring that end users will not be required to

Grant admin consent for Soundbite Inc.

Admin consent   User consent

🔍 Search permissions

API Name	↑↓	Permission

No admin consented permissions found for the application

NOTE: This step is only necessary if you chose not to check the "Consent on Behalf of Organization" option when first accepting the permissions for the application while signing in the first time above. Depending on the configured level of security for the organization, this may be required for users to access Soundbite at all. In all cases, allowing admin access in some way is required for the "Directory Sync" feature of Soundbite to work properly when integrated with AAD.

Directory Sync - Optional

While manual management of groups and users is always available in Soundbite, it's almost always untenable for a team to manage yet another app's user access and it would be best to re-use the Azure Active Directory access that is already actively managed by your IT organization. Instead of Soundbite administrators having to manage people and groups directly, a pre-configured and automatic process will work in the background every night (per the timezone of the region) to match the two systems.

This synchronization is configured per organization. It generally takes one of the following forms:

- **Selected Users Only** - Soundbite is able to select individual users and load them into the system. This is useful during pilot periods where small numbers of hand-selected users are examining functionality to understand UI and use cases.
- **Selected Groups** - Most production deployments of Soundbite rely upon selecting one or more M365 Group, Security Group, Exchange Distribution list (nested lists are ignored), or Mail-Enabled distribution list. This enables inviting the audience based on data organizations are already managing, plus users will benefit from individuals being categorized into familiar categories.
- **Org-Wide (Selected Groups + All Users)** - In org-wide mode, ALL users in the directory are synchronized. The selected groups simply describe the groups that are allowed to display in the User Interface (UI) of the application, allowing for them to be navigated by the users and selected as audiences. This ensures that the maximum number of individuals in the organizations have access to the tool, but prevents the sometimes chaotic set of all groups in an organization from being brought into Soundbite.

NOTE: Only rather small and extremely organized directories should have all of their groups synchronized.

Enabling Directory Sync with Azure Active Directory

The basic approach to enabling directory Sync would be having an administrator for both your Soundbite organization AND Azure Active Directory, visit the Soundbite Studio application to enable and configure it. The option is available in Soundbite Studio under the "Admin" left-side navigation under the "Settings" item. There will be a tab named "Sync", which will show the "Azure Active Directory" Sync type. It should look as follows:

← → C ⌂ 🔒 https://**usw.soundbite.cloud**/Organizations/SQ4yhWkP/settings/sync

ili·soundbite.ai

Teams   **Users**   **Sync**

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DISCOVERY

📍 Soundbite USW Feed

📅 Soundbite USW Calendar

TEAMS

👥 11/1 team

👥 All Company

👥 Customer Success

👥 Engineering

👥 Engineering

👥 Every Type of User

👥 Everyone

ADMIN

⚙ Settings

📊 Reports

👥 **Create Team**

👥 Soundbite USW Directory Sync

Next automatic run is **3/11/2022, 4:00:00 PM** local time.

Directory Sync is Currently in Preview. For more info please contact **Soundbite Support**

| Disabled | Azure Active Directory (Office 365) |

▦ Tenant ID   e5f75632-637d-4d2e-a8a7-e8f6993acb74   View in Azure Portal

Groups Microsoft 365 and security groups, plus Distribution lists, including Mail-Enabled Security. View Groups

| No Groups | Selected Groups | All Groups |

Users on the following list, plus any in groups above, will be synchronized:

All Company ✕   Customer Success ✕   Engineering ✕   Every Type of User ✕   Example Distro ✕   ✕ ⌄

MailEnabled ✕   Security Group ✕
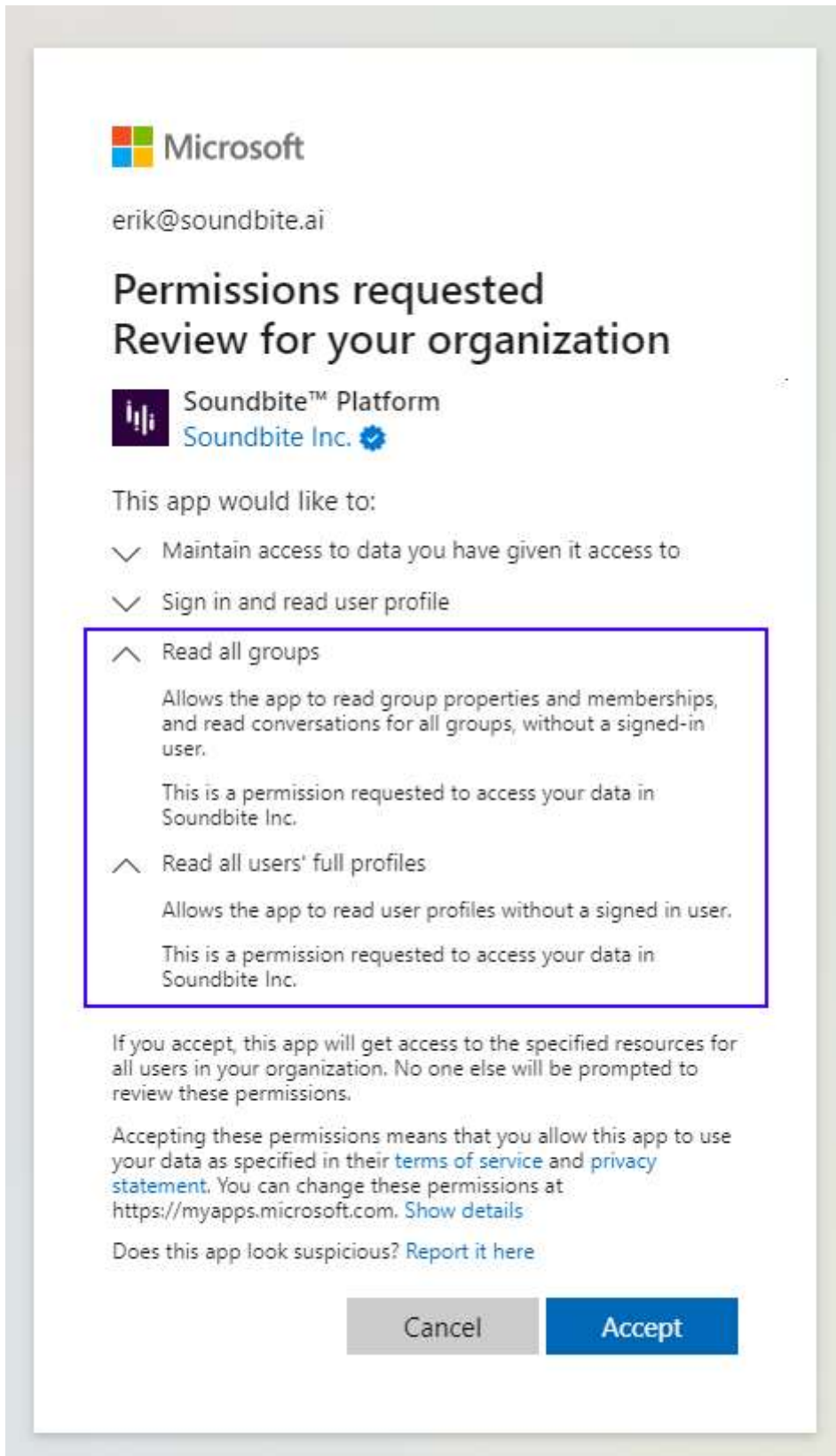
Users Licensed organization members and guest users. View Users

| No Users | Selected Users | All Users |

Users will only be synced if they are part of a selected group above; otherwise, they will **not** be synced. They can still be managed manually in Soundbite and if they are members of a group imported above.

🔄 Sync

Soundbite.AI   Support   Terms of Service

The first time enabling the sync, the Azure Active Directory administrator will need to accept offline-enabled **read-only** access for the "Soundbite Platform" enterprise app using the dialog as follows:


This allows for the sync to access the organization's Active Directory groups and users without user interaction. This enables the sync process to run nightly via background processes in the Soundbite platform, maintaining constantly updating access. The "Soundbite Platform" app will become visible in the target organization's

"Enterprise Apps" area and access can always be revoked by deleting that enterprise app entry. Access can always be restored by re-requesting access via the Soundbite Admin setting's Sync tab.

Microsoft Teams and SharePoint Apps - Optional

To simplify access to Soundbite, especially where organizations already have thriving deployments of M365 and don't want Soundbite to be "yet another app" for their audience, organizations can install the optional MS Teams and/or MS SharePoint apps. This is especially useful for front-line workers and folks who are sensitive to multiple SSO login requests since the user will already be signed into the containing app and will NOT need to sign-in again.

As of August 2022, the easiest way for an organization to deploy our MS Teams app is to simply [visit Microsoft AppSource, the official marketplace for M365 apps and extensions that have been verified by Microsoft](#) ⧉.

https://appsource.microsoft.com/en-us/marketplace/apps?search=soundbite

Microsoft | AppSource   Apps   Consulting Services   Industry Clouds   Partners

Search results for "soundbite"

Showing results in apps.

Filters

🔍 Search filters

⌄ Products

⌄ Categories

⌄ Industries

⌄ Trials

⌄ Pricing Model

⌄ Ratings

⌄ Compliance ⓘ

All results

Soundbite for Microsoft Teams

Soundbite

🟣 Teams

Soundbite™ enables next-generation collaboration by transforming internal & external communications.

★ 5.0 (2 ratings)

Additional purchase may be required

Get it now

Soundbite for Microsoft SharePoint and Viva

Soundbite

🔵 SharePoint

Soundbite™ enables next-generation collaboration by transforming internal & external communications.

Additional purchase may be required

Get it now

VivaVoice Pilot Program

Soundbite

🔵 SaaS

Enterprise audio that gives you 100% more engagement in 90% less time when you share Soundbites

Contact me

NOTE: It is recommended the organization enable Directory Sync (see above) before deploying to Teams as users do NOT have access to Soundbite until they are invited via manual or automatic user management; otherwise, it's possible for the apps to display to the users, but Soundbite not recognize them as valid and the apps will do nothing for those missing users.

Microsoft Teams

The MS Teams app enables two separate capabilities:

A "Personal Tab" that enables users to see a consolidated feed of all their relevant Soundbites, which is added as a new tab app for each Team. This requires adding the app, configuring a chosen team, then confirming its addition to the page.

Q Search

Soundbite ...   My Feed   About

Soundbite (Preview) Feed   ↻   + Create Soundbite

NAME

Erik Morning Update
Tomorrow at 7:30 AM   🎤 Record   🗑

Erik Morning Update
Today at 7:30 AM   🎤 Record   🗑

Erik Morning Update
Yesterday at 7:30 AM   🎤 Record   🗑

Erik Morning Update
03/04/2022   🗑   ▶ Play

Testing a publish upload from teams for 1 pm CST
02/28/2022   ▶ Play

Preview Teams App Testing
02/28/2022   ▶ Play

Activity
Soundbite ...
Chat
Teams
Calendar
Apps
Help

Plus, a "Team Tab" that shows any user accessing that team Soundbites relevant to a chosen team feed in Soundbite. Remember, that the user browsing that tab must be a member of that Team in Soundbite as well as in MS teams; otherwise, the user will receive access denied behavior in the tab. This is most easily accomplished by ensuring 1) your organization enables AAD sync 2) You only add tabs to Teams that have a 1:1 relationship to their Team in AAD.

Microsoft SharePoint & Viva

The MS SharePoint & Viva app enables a new Soundbite web part which can be dragged onto pages and configured:

The configuration options are as follows:

- Title - The display text in the top-left of the widget
- Group Route - This is the unique string value associated with a group populated into Soundbite. By default this value is empty, which indicates the feed will show ALL sessions relevant to the current user that are waiting to be played or recorded. To find the group route value, one can visit a team in the Soundbite studio app and find the route in the URL of a group's page in the form
  `https://usw.soundbite.cloud/organizations/[org route]/groups/[group route]/feed` .

Once the page is published, the feed will show relevant sessions, enabling interactions with them via modal dialogs, such as playing and acknowledging a Soundbite session:

M365 MyApps - Optional

The [MyApps page in M365](#) ⧉ is a destination for all enterprise applications available in a customer's tenant. After granting access to either Soundbite Studio and/or the Soundbite Platform apps, there will likely become visible a "Soundbite" and "Soundbite Platform" app on this page. Users will be able to click either option to reach Soundbite Studio.

If the customer wishes to hide these - and we would recommend hiding the redundant "Soundbite Platform" app just for simplicity - then one can open up Azure AD administration and hide it from the "Properties" blade of the analogous Enterprise App.