

DataDirector for SuperOffice CRM

Getting Started Prevent unauthorized access to your SuperOffice CRM data

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Welcome to the DataDirector for SuperOffice CRM

Introduction

DataDirector, the tool that prevents unauthorized access to your SuperOffice® CRM data.

InfoBridge DataDirector enables the possibility to define roles and rights for each individual user that uses SuperOffice for Windows, SuperOffice Web or any client that is based on SuperOffice NetServer technology.

Rights are synchronized to (Remote) Travel users and Satellites and can be configured from the central database.

What is DataDirector

DataDirector Admin

DataDirector Admin gives you the access to the configuration of DataDirector. The configuration of DataDirector is done on a user level. These user levels are in principle the same as SuperOffice Admin roles.

NOTE

The DataDirector Roles are different from the SuperOffice roles; they are not linked or otherwise connected to each other.

Roles and Rules

Every DataDirector Role contains one or more DataDirector Rules. Every rule consists of one or more rights to apply. Basically, each rule lets you define which rights you want to apply under what circumstances.

Rights

Rights can be applied on field level and on card level. Depending on the rule type and functions in SuperOffice CRM, different combinations of rights can be set on cards and fields.

- Create; Sets rights to add new cards.
- Read; Sets rights to read/view the entire card or the specified field.
- Update; Sets rights to edit or update the entire card or the specified field;
- Delete; Sets rights to delete entire cards.

Within each rule one or more rights can be defined.

Criteria

- Criteria can be done on field level; Field level example: 'is the "category" field equal to "Customer".
- Criteria can be done on related entity level; Entity level example: 'has this "contact" one or more "Sales" linked to it'.
- A combination of the two criteria types is also possible; Combination example: 'One
 or more Sales with an amount that is higher than 1000 linked to it'.

Data objects

Rights and criteria are available on SuperOffice Entities:

Contact.

Person.

Project.

Sale.

Appointment (Appointment, Task, Phone call, Document).

Selection.

User Defined Fields

Rules that are configured for "User Defined Fields" (UDF's) are actually configured on the data columns. If these UDF's are changed by publishing a new UDF version from SuperOffice Admin (recognized by a new template variable for that field) it is necessary to (re)start DataDirector Admin.

On startup of DataDirector Admin the new version of the UDF's will be applied on the rules that were previously configured.

NOTE

If a new UDF version is published without launching DataDirector Admin after the publication, users might have access to one or more UDF's to which the users did not have access before. Remember to run DataDirector Admin and verify after publishing UDF's.

Getting Started

After starting the DataDirector Admin you will be prompted for your SuperOffice login credentials.

	LOGIN – X
\$	DataDirector Admin
User name: Password:	
	<u>Cancel</u>

NOTE

To be able to log in make sure that you are a valid SuperOffice Admin User and have a valid license for SuperOffice.

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SuperOffice CRM

The User Interface

After logging into the InfoBridge DataDirector the status screen will be presented to you.

The left column is the 'Navigation Pane' of InfoBridge DataDirector and gives you access to all parts of the program; The navigation pane consists of 3 main groups, click on the group button to show the underlying menu items:

- Status, allows you to view the status of DataDirector, you can see the license details and the users that are using the DataDirector security settings;
- Users, shows you all the SuperOffice users who can use SuperOffice in their daily work; Here you must set the rules for the individual user or users;
- Roles and Rules, allows you to configure all necessary security restriction that can be set for the SuperOffice users.



TIP

You can always press 'F1' or click the 'Help' button in the lower left corner to show context sensitive help about the current screen.

This getting started guide gives you a brief overview of the InfoBridge DataDirector features, benefits and some related concepts. The purpose of this section is to get you up and running as quickly as possible. If these instructions are not clearly enough, you can always learn from other topics in this manual

DataDirector Status

Status screen

After logging in the welcome screen is shown and shows important information. The information that is displayed is explained in detail further on in this manual. You must have administrator privileges (SuperOffice) to use DataDirector Admin.



A Status: Shows the following information

- 'Getting Started' manual;
- 'Help' manual;
- Show license button;
- License Status;
- SuperOffice Serial number;
- SuperOffice Version;
- Total user licenses;
- Used user license (how many users depend on DataDirector);
- Available user licenses;
- Pause DataDirector authorization (affects all users!);
- Set advance diagnostic logging for Windows plug-in (use only for testing!);
- Set advance diagnostic logging for Web plug-in (use only for testing!);

Set high cache refresh rate for plug-ins (use only for testing!).

- Navigation Pane: Shows the following information
- Status;

B

- Users;
- Roles and Rules.
- **C** License Info: Shows the following information
 - Licenses; Display the available licenses.
 - Rules; Show how many rules you have set for every role.
- **D** Buttons: Shows the following information
 - Refresh (F5); Refresh the screen and settings.
 - Help; Show context sensitive help based on the active panel.
 - About; Information about InfoBridge DataDirector.

DataDirector Users

Users screen

This screen shows all the users that are available in SuperOffice as associate.

			DATADIREC	TOR ADMI	N _ = ×
DataDirector Admin					
Tatus Status	Users				<u> </u>
🖄 Users	USELS				
Sea Roles and Rules			Users:		
	Liser ID	Authorization	Liser Name	Company Name ^	Sur
	CAPO	Hachonización	Carlo Pompen	InfoBridge B V	Infol
	F1		Eigurpal Eigurpal	InfoBridge B V	Serv
	HB		Henk Bergevoet	InfoBridge B.V.	Infol
	HEPE		Henny Peeters	InfoBridge B.V.	Infol
	MAWA		Matthiis Wagemakers	InfoBridge B.V.	Infol
	PIERRE		Pierre van Mever	InfoBridge B.V.	Infol
	SYSTEEM		Systeem Systeem	InfoBridge B.V.	Info
350 Licenses 0 Rules	4 1152		Inomas speekenbrink	jinrobridge B.V.	jinrol
Logged in as:HB					
0 Refresh (F5)	•				• •
🕜 Help	Edit				🛛 Report
1 About	Show retired users.	Only show ena	bled users.	No group by	-

In the right panel of the main screen you see the user list. For these users you can set the DataDirector Authorization.

REMARK

When you enable a user in DataDirector Admin you consume 1 DataDirector user license.

This column header	Shows this
User ID	The user login name for SuperOffice.
Authorization	Is this user enabled or disabled.
User Name	The full name of the user.
Company Name	The company name the user belongs to.
SuperOffice Group	The SuperOffice user group the user belongs to.
Description	Description of the roles and rules that apply to this
	user.

With this option you can	Do this
Edit	Edit the "Roles and Rules" for this user.
Report	Create a report for the selected user or users.
Show retired users	Show the names of the users that are retired.
Only show enabled users	Show only the users that are enabled for DataDirector Authorization.
Group By	Group by Company name, SuperOffice Group, etc.

DataDirector Roles

Roles and Rules screen

This screen shows all the Roles and Rules.

				D	ATAD	IRECT	OR	ADMIN	N _ = X
DataDirector Admin	Roles	and Ru	es						20
Poles and Pules					Poles				
	Rank ^	Name	Descri		Roles.				
2E0 Licenses									
330 Licenses	New	🖌 Edit 🜔	3 Delete 🌀	Up 🕚 Down			Repor	t 😹 Export	😹 Import
					Rules:				
	Rank ^	Entity	Descri						
0 Rules									
Logged in as:HB									
O Refresh (F5)									
😮 Help									
About	New	📝 Edit 🔇	Delete 🕤	Up 🔮 Down			Repor	t 😽 Export	😹 Import

In the right panel of the main screen you see the roles and rules settings. Here you can add different roles and rules.

The roles settings list has the following elements:

Element name	action
New	Add a new role to DataDirector.
Edit	Edit an existing role.
Delete	Delete the existing role.
Report	Create a report for the selected role or roles.
Export	Export all the roles to a file.
Import	Import all the roles into DataDirector Authorization.

The rules settings list has the following elements:

With this option you can	Do this
New	Add a new rule to DataDirector;
Edit	Edit an existing rule;
Delete	Delete the existing rule;
Report	Create a report for the selected rule or rules;
Export	Export all the rules to a file;
Import	Import all the rules into DataDirector Authorization

Navigation Pane

DataDirector Admin

DataDirector Admin
Status
🏄 Users
Coles and Rules
350 Licenses
0 Rules
Logged in as: HB
(U) Refresh (F5)
🕜 Help
1 About
Edit Role
Role Settings
A roleis just a group containing one or more rules.
The role's name will be shown in SuperOffice tooltips when functionality is blocked.

Edit Rule Rule Settings

Rule Results; The following rights will.

Rule Criteria; When all of the followin.

The rule's description will be shown in SuperOffice tooltips when functionality is blocked.

Be aware that in case you don't define any criteria, rights will always be applied for this rule.

DataDirector Admin

Opens the default status window

- Status; The "Status" screen is presented to you when you start the InfoBridge DataDirector;
- Users; The "Users" screen show all the users that exists in SuperOffice;
- Roles and Rules; In the "Roles and Rules" screen you can set the active roles and rules for the users;
- Licenses; Shows the available licenses;
- Rules; Shows how many rules you have set;
- Help; The help file will be opened (topic based);
- About; this shows information about the version of the product you are using.

Role

Opens the Role settings window.

 Role Settings; Here you can set all the roles you want for your SuperOffice Database.

Rule

Opens the rule settings window.

- Rule Settings; here you can specify the entity the rule applies to.
- Rule Result (The following rights will be applied); Here you can set the rule results for the selected entity.
- **Rule Criteria**; here you can set the specific criteria for the selected entity.

DataDirector Configuration

Roles

Create a role

Within a role the rights are defined; these rights are configured in a rule.

A role can hold one or more rules that will be eventually applied to the object that you are applying rights to.

				D	ATAD	IREC	FOR A	DMIN	- = X
DataDirector Admin Status Users	Roles a	and Rul	es 62						20
Roles and Rules					Roles:				
		Name	Descri						
	New	Edit 🛞	Delete 🕥	Up 🕚 Down			📝 Report	器 Export	😽 Import
350 Licenses					Pulace				
	Rank ^	Entity	Descri		Kules.				
0 Rules									
Logged in as: HB									
P Help									
1 About	• New	🖌 Edit 😢	Delete 🕜	Up 🕚 Down			2 Report	🛼 Export	😽 Import

How to create a role?

- 1. Select the "Roles and Rules" menu item in the navigation pane.
- 2. Click on the "New" button in the "Roles" part of the screen.
- 3. The role dialog will be shown.

i 🖻 .		EDIT	ROLE	- X
Edit Role Role Settings	Role Settings			
	Name (Required):			
	Description (Optional):			
	4			
				T
	Previous Next	Cance	۱ <u>S</u> a	ve

- 4. Give the role a name (choose the name carefully in case of maintenance). This is required;
- 5. Give the role a meaningful description;

A		EDIT ROLE – X
Edit Role Role Settings	Role Settings	
	Name (Required):	
	Read Company card	
	Description (Optional):	
	Only viewing is allowed for this role.	A
	Previous Next	Cancel Save

6. Press the "Save" button.

After you have saved the role the dialog is closed and the role is added to the Roles list.

a		D	ATADIREC	TOR ADMI	N _ = ×
DataDirector Admin Status Users	Roles and Ru	ules			20
Roles and Rules			Roles:		
	Name ^	Description			
	Read Company card	Only viewing is allowed for this	irole.		
350 Licenses	4				
	🕒 New 🎽 Edit 🕻	😢 Delete 🎧 Up 🕚 Down		📝 Report 😹 Expo	rt 😹 Import
			Rules:		
0 Rules					
Logged in as: HB					
0 Refresh (F5)					
🕜 Help					
About	🕄 New 📝 Edit (😢 Delete 🕥 Up 🕚 Down		📝 Report 😹 Expo	rt 😹 Import

The next step is to **add rules** to the new role.

Edit a role

Once a role is created it is still possible to change the name and the description text of that role.

a		D	АТА	DIR	ЕСТ	OR	ADMI	N = = ×
DataDirector Admin	Roles and Ru	lles						20
🐊 Roles and Rules			Roles:					
	Name ^	Description						
	Read Company card	Only viewing is allowed for this	role.					
350 Licenses	New ZEdit (😮 Delete 🕜 Up 🕓 Down				7 Repo	rt 😹 Expor	t 😽 Import
			Rules:					
0 Rules								
Logged in as:HB								
0 Refresh (F5)								
🕜 Help								
Ab out	🕒 New 🎽 Edit 🕻	🔀 Delete 🕢 Up 🕚 Down					rt 😹 Expo	rt 😹 Import

How to edit a role?

- 1. Select the "Roles and Rules" menu item in the navigation pane;
- 2. Select the role you want to edit;
- 3. Press the "Edit" button or double click the role you want to edit;
- 4. The role dialog will be shown;

<u>A</u>		EDIT	ROLE	- X
Edit Role Role Settings	Role Settings			
	Name (Required):			
	Read Company card			
	Description (Optional):			
	Only viewing is allowed for this role.			4
	Previous Next	Cance	el <u>S</u> a	ve

- 5. Change the role name;
- 6. Change the role description;
- 7. Press the "Save" button.

After you have saved the role the dialog is closed and the role is refreshed in the Roles and Rules list.

Delete a role

If you want to delete a role make sure that deleting it will not trigger an 'unsafe' situation.

NOTE

If the role is still in use, deleting the role may expose data to that user that is normally not allowed to view or edit.

ia.	DATADIRECI	TOR ADMIN – 🗆 🗙
DataDirector Admin DataDirector Admin Status Users Dules and Dules	Roles and Rules	20
	Name * Description Read Company card Only viewing is allowed for this role.	
350 Licenses	New ZEdz Opelete Op Up Opown	📝 Report 📸 Export 📸 Import
0 Rules		
Logged in as:HB		
😈 Refresh (F5)		
1 About	🕒 New 🎽 Edit 😵 Delete 🕜 Up 😍 Down	🕜 Report 😹 Export 😹 Import

How to delete a role?

- 1. Select the "Roles and Rules" menu item in the navigation pane.
- 2. Select the role you want to delete (you can't select more than one role for deletion).

- 3. Press the "Delete" button.
- 4. A message will appear to inform you that you are deleting a role and all the depending rules.
- If you are aware of the consequences you are going to take press "Yes", else press "No".

After you have deleted the role; the list is refreshed in the Roles and Rules list.

Export a role

For backup or exchange purposes DataDirector Admin offers an import and export function for roles.

NOTE

When you export roles from DataDirector Admin all the rules that belong to the role are also exported.

How to export a role?

- 1. Select the "Roles and Rules" menu item in the navigation pane.
- 2. Select the role or roles you want to export (hold the CTRL or SHIFT button to select more than one role).
- 3. Press the "Export" button.
- 4. A save dialog will appear.
- 5. Give the export file a descriptive name.
- 6. Press "Save".
- 7. You are done exporting roles.

Import a role

For backup or exchange purposes DataDirector Admin offers an import and export function for roles.

		Koles.			
Name î	Description				
🔂 New 📝 Edit	🔀 Delete		Report 🛜	Export	💦 Import

How to import a role or roles?

- 1. Select the "Roles and Rules" menu item in the navigation pane.
- 2. Press the "Import" button.
- 3. Select the file that holds the roles you want to import.
- 4. Press the "Open" button.
- 5. A message appears to you with an overview of the roles that will be imported;



- 6. If you are sure you want to import the roles press "Yes", else press "No";
- 7. You see that the roles appear in the screen Roles and Rules; also the depending rules are imported;
- 8. You are done importing roles.

Rules

Create a rule

In a rule the rights are defined; a rule can hold one or more definitions for the object that you want to secure.

A		D A	TADIRECT	OR ADMI	N = = ×
DataDirectorAdmin Status Status Users	Roles and Rules	3			20
Soles and Rules			Roles:		
	Name ^ Des	cription			
	Read Company card Only	viewing is allowed for this r	ole.		
350 Licenses	🕂 New 🖌 Edit 😣 D	elete 🎧 Up 🕙 Down		📝 Report 😹 Expo	t 🗞 Import
			Rules:		
0 Rules					
Logged in as:HB					
O Refresh (F5)					
🕜 Help					
About	🕒 New 🎽 Edit 😣 D	elete 🕢 Up 🕚 Down		📝 Report 😹 Expo	rt 📸 Import

How to create a rule?

- 1. Select the "Roles and Rules" menu item in the navigation pane;
- 2. Select the Role where you want to add the rule or rules too;
- 3. Click on the "New" button in the 'Rules' part of the window;
- 4. The rule dialog will be shown;

a		EDIT RULE – 🗆 🗙
Edit Rule Rule Settings	Rule Settings	
Rule Results; The following rights will	Entity:	
Rule Criteria; When all of the followin	Contact (Companies)	
	Description (Optional):	
		A X
The rule's description will be shown in SuperOffice tooltips when functionality is blocked.		
Be aware that in case you don't define any criteria, rights will always be applied for this rule.	Previous	<u>Cancel</u> Save

- 5. Select the "Rule Settings" menu item in the navigation pane;
- 6. Choose a 'Entity' from the list;

In our case select 'Contact (Companies)'.

7. Fill in a meaningful description (this is optional);

 Select the "Rule Result; The following rights will be applied" menu item in the navigation pane;



 Select a 'Target' you want to set the rule for (these are the field names of the selected entity including the 'more' and ID fields);

In this example we selected the target 'contact.name, Name'.

 Select the security option you want to set for the selected field (default the options 'Read' and 'Update' are set);

You can choose	'Create'	, ' Read ', 'l	Update'	and	'Delete'
----------------	----------	-----------------------	---------	-----	----------

	Target	Create	Read	Update	Delete	Del. Result
•	contact.name, Name 💌					Delete
*	•					

REMARK

Depending on the target you choose the options 'Create', 'Read', 'Update' and 'Delete' are already set for you. The gray background tells you that the option can't be chosen for the selected field.

In this example we unchecked the "Update" option;

11. When you have set enough rights for this rule you can press "Save";

The rights are set for the Company Card on the field '**Contact.Name**' for the selected user;

		D	ATADIRECI	FOR ADMIN	• _ = ×
DataDirector Admin	Roles and Ru	les			20
Roles and Rules			Roles:		
	Name * Read Company card	Description Only viewing is allowed for this	role.		
350 Licenses	🕒 New 🇹 Edit 🗧	Delete 🕥 Up 🕐 Down	Rules:	📝 Report 😽 Export	🗞 Import
0 Rules	Entity Descr Contact Read	ription only company name.			
Logged in as:HB					
0 Refresh (F5)					
🕜 Help					
About	🕒 New 🇹 Edit 🧕	3 Delete 🞧 Up 🕚 Down		📝 Report 🛼 Export	😽 Import

Test the rule in SuperOffice and you see that the user can't change the name of the company when you are in SuperOffice edit mode.

Setting Rule Criteria

REMARK

You don't have to set the Rule Criteria if the rule is not depending on any criteria.



- 12. When you want to set special criteria for the field you selected earlier select Rule Criteria from the navigation pane;
- Select the 'Target' you want to set the rule for (these are the field names of the selected entity including the 'more' and ID fields);
- 14. Select the 'Operator' from the list (this list depends on the field type that is selected);
- 15. Fill in the '**Value**' that must be evaluated (this depends on the 'Operator' you have chosen);
- 17. When you have set enough rights for this rule you can press "Save";
- 18. Now you have set rights for the user you selected.

Edit a rule

Once a rule is created it is still possible to change the rule and the security that the rule holds.

6	DATADIREC	TOR ADMIN – 🗆 🗙
DataDirector Admin Status Users	Roles and Rules	20
Roles and Rules	Roles:	
	Name Description	
	Head Company Card Unity Viewing is allowed for this role.	
350 Licenses	🕒 New 📝 Edit 🔇 Delete 🕟 Up 🕐 Down	Report S Export S Import
	Rules:	
0 Rules	Ently ' Description Contact Read only company name.	
Welcome Henk Beraevoet		
0 Refresh (F5)		
🕜 Help		
About	🕂 New 🎽 Edit 😣 Delete 🕜 Up 🔮 Down	📝 Report 😹 Export 😹 Import

How to edit a rule?

- 1. Select the "Roles and Rules" menu item in the navigation pane;
- 2. Select the role that holds the rule you want to edit;

- 3. Select the rule you want to edit;
- 4. Press the "Edit" button or double click the rule;
- 5. The rule dialog will be shown;

		EDIT RULE - = ×
Edit Rule	Rule Settings	
Rule Results; The following rights will	Entity:	
Rule Criteria; when all of the followin	Contact (Companies)	
	Description (Optional):	
	Read only company name.	×
The rule's description will be shown in SuperOffice tooltips when functionality is blocked. Be aware that in case you don't define any criteria, rights will always be applied for this rule.	Previous Next	<u>C</u> ancel Save

- 6. You can change the "Rule Settings", "Rule Result" and the "Rule Criteria";
- 7. You can switch between the menu items by using the "Previous" and "Next";
- 8. When you are done with your changes press the "Save" button.

After you have saved the rule the dialog is closed and the rule is refreshed in the Roles and Rules lists.

Delete a rule

If you want to delete a rule make sure that deleting it will not trigger an 'unsafe' situation.

NOTE

What goes for a role also goes for a rule; make sure that deleting the rule will not expose data to a user that he or she is normally not able to view or edit.

		D	ATADIREC	TOR ADMIN – 🗆 🗙
DataDirector Admin	Roles and R	ules		20
Roles and Rules			Roles:	
	Name ^	Description		
	Read Company card	Only viewing is allowed for this	role.	
350 Licenses	New ZEdit	S Delete 🕢 Up 🕚 Down		📝 Report 😹 Export 😹 Import
	Entity 1	ania kia a	Rules:	
0 Rules	Contact Read	d only company name.		
Logged in as:HB				
O Refresh (F5)				
🕜 Help				
About	🕄 New 🎽 Edit	😢 Delete 🕥 Up 🔮 Down		📝 Report 😹 Export 😹 Import

How to delete a rule?

- 1. Select the "Roles and Rules" menu item in the navigation pane;
- 2. Select the role you that holds the rule you want to delete;
- 3. Select the rule you want to delete (you can't select more than one rule for deletion)

- 4. Press the "Delete" button;
- 5. A message will appear to inform you that you are deleting a rule;
- If you are aware of the consequences you are going to take press "Yes", else press "No".

After you have deleted the rule; the list is refreshed in the Roles and Rules lists.

Export a rule

For backup or exchange purposes DataDirector Admin offers an import and export function for rules.

NOTE

When you export rules from DataDirector Admin only the selected rule or rules are exported.

		Rules:	
Entity ^	Description		
Contact	Read only company name.		
🛟 New 🎽	Edit 😣 Delete 🕥 Up 🔇	Down	📝 Report 🛼 Export 🗞 Import

How to export a rule?

- 1. Select the "Roles and Rules" menu item in the navigation pane;
- 2. Select the role that holds the rule or rules;
- Select the rule or rules you want to export (hold the CTRL or SHIFT button to select more than one rule);
- 4. Press the "Export" button;
- 5. A save dialog will appear;
- 6. Give the export file a descriptive name;
- 7. Press "Save";
- 8. You are done exporting rules.

Import a rule

For backup or exchange purposes DataDirector Admin offers an import and export function for rules.

Entity ^	Description	
New D	Edit 🔞 Delete	📝 Report 😪 Export 😪 Import

How to import a rule or rules?

- 1. Select the "Roles and Rules" menu item in the navigation pane;
- 2. Select the role that must hold the rule or rules;
- 3. Press the "Import" button of the rules part of the screen;

- 4. Select the file that holds the rules you want to import;
- 5. Press the "Open" button;
- 6. A message appears to you with an overview of the rules that will be imported;
- 7. If you are sure you want to import the rules press "Yes", else press "No";
- 8. You see that the rules appear in the screen Roles and Rules (rules);
- 9. You are done importing rules.

NOTE

You can combine the rules as follows: When you have created a rule "No change allowed if the sale amount is greater than 50.000" you can add another rule like "Changes allowed if the sale amount is below 100.000". Then you have an "IF"statement.

Enable DataDirector Roles

To activate the role and the accompanying rules for the selected user follow the steps below.

NOTE

You can select more than one user. Hold the SHIFT key and select the users to set the rules for.

1. Select the user option in the DataDirector Admin.

۵					DATADIR	ECTOR ADMIN - = ×
DataDirector Admin						
Status Status	Users					A 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4
🖄 Uses	USELS					
🐊 Roles and Rules				Use	::::	
	User ID	Authorization	User Name	Company N	SuperOffice Group	Description
	THSP	Enabled	Thomas Speekenbrink	InfoBridge B.V.	InfoBridge	Authorization: Contact (Companies), Perso
350 Licenses						
0 Rules						
Logged in as:HB						
~						
O Refresh (F5)	•	1		1		F
🕜 Help	Edit					🗹 Report
1 About	Show ret	iredusers. 😡	Only show enabled us	ers.		Licenses available: 349



A	EDIT USER 'THSP' – X
Edit User 'THSP'	User Settings
User Settings	oser serrings
User Roles	Enable DataDirector authorization. Enable authorization on the following entities: Contact (Companies) Person (Contads) Project Appointment (Follow-ups, Documents) Sale
will consume 1 user license.	
Don't forget to assign roles to the user.	Previous Next Save Cancel

3. Select "User Roles".

A				E	DIT	USE	R 'T	HSP'	_ X
Edit User 'THSP'	Liser Ro	les							
User Settings	USEL KO	Nes							
User Roles	Available:				Selected:				
	Rank ^	Name	Description						
	1	Read Company Card	Only Viewing is						
	2	Edit Company Card	Edit is allowed						
	4			<<					
	:								
	4								
Enabling authentication on a user will consume 1 user license.									
Don't forget to assign roles to the	Previo	us <u>N</u> ext					Save		ancel

4. Select the role you want for the selected user;

A		E	DIT USER	'THSP' = X
Edit User 'THSP'	User Roles			
User Settings	USEL KUIES			
User Roles	Available:		Selected:	
	Rank Name	Description		
	1 Read Company C	ard Only Viewing is		
	2 Edit Company Ca	d Edit is allowed		
		>>		
	4			
	4			
Enabling authentication on a user will consume 1 user license.				
	▲	Þ		
Don't forget to assign roles to the user.	Previous Next			ave <u>C</u> ancel

5. Press the ">>" button to apply the role to the selected user.



- 6. You can see that the role is now activated for the selected user;
- 7. Press "Save" to finally activate the role.

A					DATAD	DIRECTOR	ADMIN - = ×
DataDirector Admin							2
Natus Status	Use	rs					
🖄 Users		.e					
and Rules Roles					Users:		
	U	User Name	C	Super	Description	0.1.1(0	2
	IHSP	E Inomas Spee	Cendrink In	InfoBridge	Authorization	: Contact (Companies)	Koles: Read Company Card j
350 Licenses							
(Dulas							
0 Rules							
Logged in as:HB							
O Refresh (F5)							
🕜 нер	Ec	lit					Report
About	Show	w retired users.	🗷 Only :	show enable	d users.		

When you return to the main screen of the **DataDirector Admin - Users** you can see in the description of the user what role and rules are enabled for the selected user.

Disable DataDirector Roles

To de-activate the role and the accompanying rules for the selected user follow the steps below.

1. Select the user option in the DataDirector Admin and click on Edit;

. 🕰					DATADIR	ECTOR ADMIN – 🗆 🗙
DataDirector Admin	Users					2
🖄 Uses	USers					
Roles and Rules				Use	rs:	
	User ID	Authorization	User Name	Company N	SuperOffice Group	Description
	THSP	Enabled	Thomas Speekenbrink	InfoBridge B.V.	InfoBridge	Authorization: Contact (Companies), Perso
350 Licenses	4					
0 Rules						
Logged in as: HB						
O Refresh (F5)	•					Þ
🕜 Неф	Edit					Report
About	Show ref	tired users.	Z Only show enabled us	ers.		Licenses available: 349

2. De-select the "Enable DataDirector authorization" option for the selected user;

A	EDIT USER 'THS	5 P' — X
Edit User 'THSP'	User Settings	
User Roles	Enable DataDirector authorization. Enable authorization on the following entities: Contact (Companies) Person (Contads) Project Appointment (Follow-ups, Documents) Sale	Select All
Enabling authentication on a user will consume 1 user license.		
Don't forget to assign roles to the user.	Previous Next Save	<u>C</u> ancel

3. Press "Save" to finally de-activate the role for this user.

When you return to the main screen of the **DataDirector Admin - Users** you can see in the description of the user that the role is removed.

DataDirector Reports

User Report

For documentation purposes it is possible to create a report of all the users that have authorization set in DataDirector Admin.

NOTE

All reports are presented in HTML format to profit from the many options that most browsers have to save the reports to different file formats

A					DATADIR	ECTOR ADMIN - = ×
DataDirector Admin Status Users	Users					2
🗞 Roles and Rules	User ID	Authorization	User Name	Use Company N	superOffice Group	Description
	THSP	Enabled	Thomas Speekenbrink	InfoBridge B.V.	InfoBridge	Authorization: Contact (Companies), Perso
350 Licenses						
0 Rules						
Logged in as: HB						
O Refresh (F5)	•					ľ
😮 Help	Edit					📝 Report
About	Show ret	iredusers.	Only show enabled us	ers.		Licenses available: 349

How to create a report of users and their authorization?

- 1. Select the "Users" menu item in the navigation pane;
- Select the user or users you want to report (hold the CTRL or SHIFT button to select more than one user);
- 3. Press the "Report" button;
- 4. A save dialog will appear;
- 5. Give the report a descriptive name;
- 6. Press "Save";
- 7. The report is saved and opened in the browser;

InfoBridge DataDirector Report - Windows Internet Expl	orer	_ 🗆 ×
C:\Users\Eek\Desktop\Report_Users.htm	💌 🍫 🗶 🔁 Bing	P •
🖕 Favorites 🛛 🍰 🍘 Suggested Sites 👻 🖉 Web Sice Gallery	•	
6 InfoBridge DataDirector Report	🚹 🕶 🗔 🗵 📻 👻 Page 👻 Safety 👻 Tool	• 🛛 • "
User THSP (Thomas Speekenbrink): Company Name: InfoBridge B.V. SuperOffice Group: InfoBridge Authorization: Contact (Companies), Person (Contacts), F	roject, Appointment (Follow-ups, Documents), Sale Roles: -	
Done	📄 📄 👘 Computer Protected Mode: Off	.00% - //.

8. You are done creating a report of the users and their authorization set.

Role Report

For documentation purposes it is possible to create a report of all the roles and rules that consist in DataDirector Admin.

NOTE

All reports are presented in HTML format to profit from the many options that most browsers have to save the reports to different file formats

The following reports of Roles and Rules you can be generated:

- Roles associated with their rules;
- Rules only.

A	DATADIRECT	OR ADMIN - = ×
DataDirectorAdmin Status 2 Users	Roles and Rules	20
Soles and Rules	Roles:	
	Name ^ Description	
	Read Company card Only viewing is allowed for this role.	
350 Licenses	New VEdt 😵 Delete 🕢 Up 🕐 Down	🗹 Report 😹 Export 😹 Import
	Rules:	
1 Rules	Contact Read only company name.	
Logged in as:HB		
O Refresh (F5)		
🕜 Help		
About	🗌 🛟 New 🎽 Edit 😣 Delete 🞧 Up 🔇 Down	📝 Report 😹 Export 😹 Import

How to create a report of roles and their associated rules?

- 1. Select the "Roles and Rules" menu item in the navigation pane;
- Select the role or roles where you want to report (hold the CTRL or SHIFT button to select more than one role);
- 3. Press the "Report" button;
- 4. A save dialog will appear;
- 5. Give the report a descriptive name;
- 6. Press "Save";
- 7. The report is saved and opened in the browser;

foBridge DataDirector Repo					
💿 🗢 🙋 C: \Users \Eek \Des	ktop\RolesAndRules_Report.htm		💌 🐓 🗙 📴 Bing		P
avorites 👍 🏀 Suggested	Sites 🔹 🙋 Web Slice Gallery 👻				
InfoBridge DataDirector Report			â • 🗅 • 🖻	🖶 • Page • Saf	ety • Tools • 🔞 •
Role Read Company	card:				
only viewing is allowed for this	s role.				
Rule for Contact:					
Read only company name.					
Read only company name.					
Read only company name.	applied:				
Read only company name. The following rights will be Target	applied: Can Create	Can Read	Can Update	Can Delete	
Read only company name. The following rights will be Target contact.name	applied: Can Create	Can Read X	Can Update	Can Delete	
Read only company name. The following rights will be Target Contact name	applied: Can Create	Can Read X	Can Update	Can Delete	
Read only company name. The following rights will be Target contact name When all of the following cri	applied: Can Create	Can Read X	Can Update	Can Delete	
Read only company name. The following rights will be Target contact.name When all of the following cri Target	applied: Can Create teria are met: Opera	Can Read X	Can Update	Can Delete	
Read only company name. The following rights will be Target contact name When all of the following cri Target	applied: Can Create teria are met: Opera	Can Read X Itor	Can Update V	Can Delete alue	
Read only company name. The following rights will be Target Contact name When all of the following cri Target	applied: Can Create teria are met: Opera	Can Read X	Can Update V	Can Delete alue	
Read only company name. The following rights will be Target contact name When all of the following or Target	applied: Can Create teria are met: Opera	Can Read X	Can Update	Can Delete	
Read only company name. The following rights will be Target contact name When all of the following cri Target	applied: Can Create teria are met: Opera	Can Read X tor	Can Update V	Can Delete alue	

8. You are done creating a report of the role with all the rules it hold.

Rule Report

For documentation purposes it is possible to create a report of all the rules and their associated rights in DataDirector Admin.

NOTE

All reports are presented in HTML format to profit from the many options that most browsers have to save the reports to different file formats

The following reports of Roles and Rules you can be generated:

- Roles associated with their rules;
- Rules only.

6		D	ATADIREC	TOR ADMIN – 🗆 🗙
DataDirectorAdmin Status Status Users	Roles and Ri	ules niez		20
Roles and Rules			Roles:	
e 0	Name *	Description		
	Read Company card	Only viewing is allowed for this	role.	
350 Licenses	New Zedt	😢 Delete 🕥 Up 💽 Down	Rules:	🖌 Report 👸 Export 👸 Import
	Entity Des	cription		
1 Rules	icontact Read	a oniy company name.		
Logged in dot HD				
O Refresh (F5)				
🕜 Help				
Ab out	😯 New 🎽 Edit	😢 Delete 🕎 Up 😍 Down		🚰 Report 😽 Export 😽 Import

How to create a report of rules and their associated rights?

- 1. Select the "Roles and Rules" menu item in the navigation pane;
- 2. Select the role that hold the rule;
- Select the rule or rules you want to report (hold the CTRL or SHIFT button to select more than one rule);
- 4. Press the "Report" button;
- 5. A save dialog will appear;

- 6. Give the report a descriptive name;
- 7. Press "Save";
- 8. The report is saved and opened in the browser

InfoBridge DataDirector Report	ort - Windows Internet Explorer				<u>_ ×</u>
C: Users \Eek \Des	ktop\Rule_Report.htm		💌 🔸 🗙 🔁 Bing		P -
🖕 Favorites 🛛 🍰 🏀 Suggested	Sites 🔹 🙋 Web Slice Gallery 👻				
🔏 InfoBridge DataDirector Report			👌 • 🗟 • 🖻	🖷 🔹 Page 🔹 Safety 🕶	Tools • 🔞 • "
Rule for Contact:					
Read only company name.					
The following rights will be ap	oplied:				
Target	Can Create	Can Read	Can Update	Can Delete	
contact.name		Х			
When all of the following crite	ria are met:				
Target	Operator		V	alue	
Dana			Computer Protected Mor	de: Off	100%

9. You are done creating a report of the rule with all the associated rights

DataDirector Options

Options

The "**Status**" menu holds some options that apply to the use and troubleshooting of DataDirector.

Pause DataDirector authorization (affects all users!):		OFF
Set advanced diagnostics logging for Windows plug-in (use only for testing!):	ON	
Set advanced diagnostics logging for web plug-in (use only for testing!):		OFF
Set high cacherefresh rate for plug-ins (use only for testing!):	ON	

Pause DataDirector authorization (affects all users!):

Press on the "ON" or "OFF" button to pause DataDirector authorization to temporarily disable DataDirector for <u>ALL</u> users. The plug-in is still needed on the client PC.

Set advance diagnostic logging for Windows plug-in (use only for testing!):

Press on the "ON" or "OFF" button if you want to enable log file creation when you use the SuperOffice Windows Client with DataDirector.

NOTE This has a high impact on the system

Set advance diagnostic logging for Web plug-in(use only for testing!):

Press on the "ON" or "OFF" button if you want to enable log file creation when you use SuperOffice Web with DataDirector.

Set high cache refresh rate for plug-ins (use only for testing!):

Press on the "ON" or "OFF" button if you not want to restart SuperOffice Windows or Web Client every time you change or add roles and rules to DataDirector.

www.crmplaza.com/Apps/DataDirector

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