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

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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.

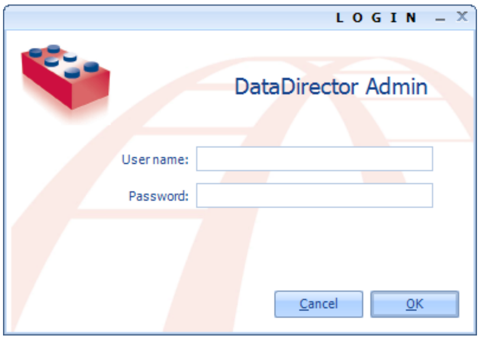
On startup of DataDirector Admin the new version of the UDF’s will be applied on the rules that were previously configured.

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.



NOTE

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

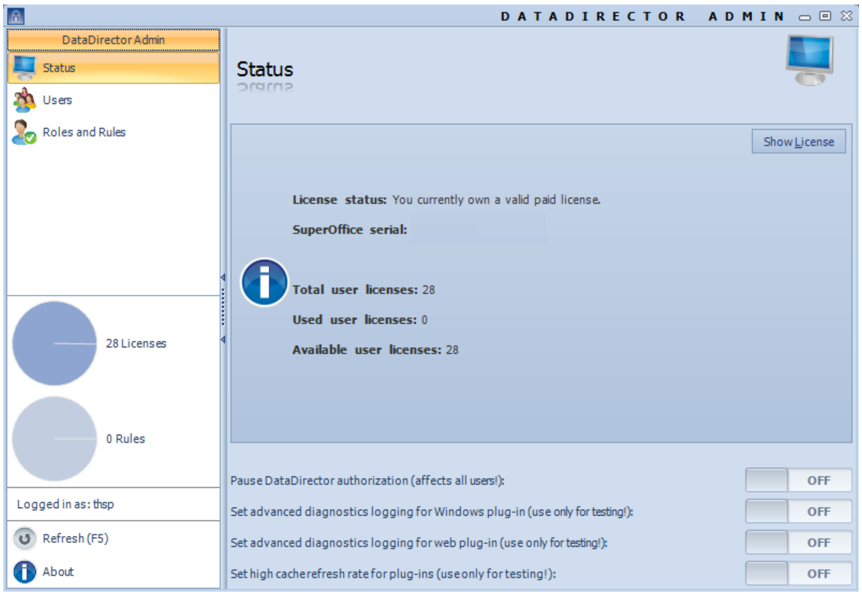
SuperOffice CRM

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

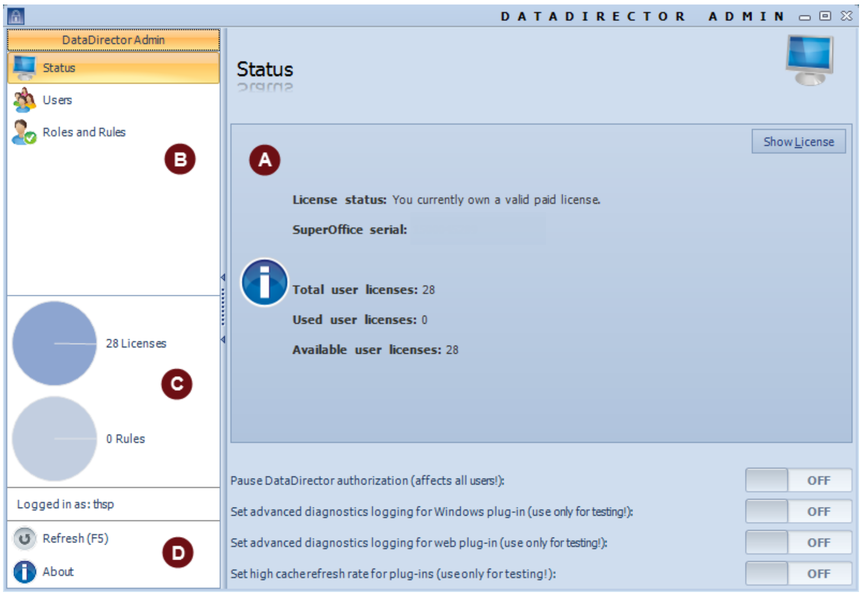
You can always press 'F1' or click the 'Help' button in the lower left corner to show context sensitive help about the current screen.

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!).

B **Navigation Pane:** Shows the following information

- Status;
- 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.

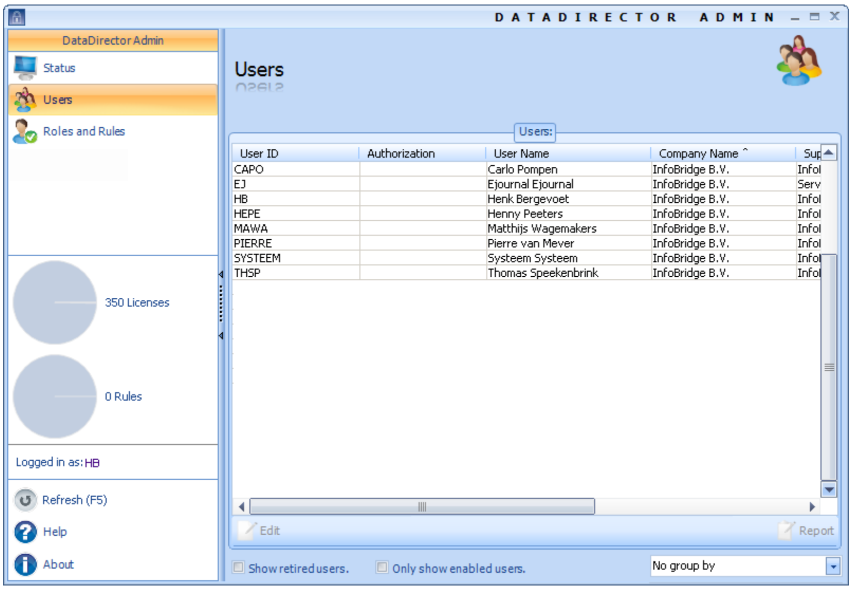
D **Buttons:** Shows the following information

- 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.



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.

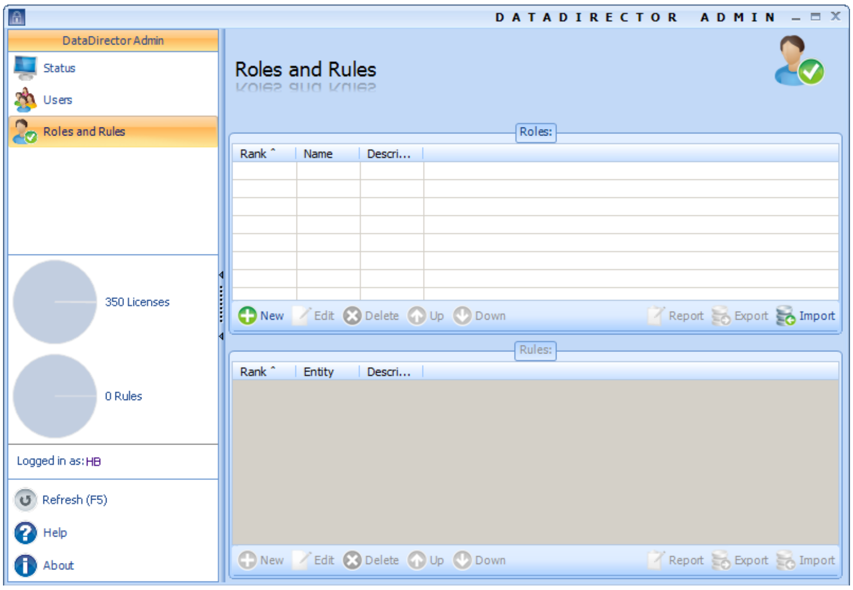
This column header	Shows this
User ID	The user login name for SuperOffice.
Authorization	Is this user enabled or disabled.
User Name	The full name of the user.
Company Name	The company name the user belongs to.
SuperOffice Group	The SuperOffice user group the user belongs to.
Description	Description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



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:

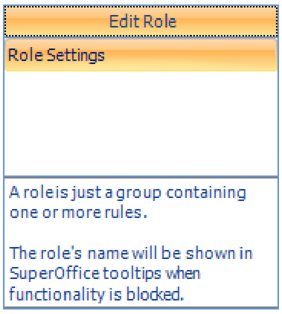
With this option you can	Do this
New	Add a new rule to DataDirector;
Edit	Edit an existing rule;
Delete	Delete the existing rule;
Report	Create a report for the selected rule or rules;
Export	Export all the rules to a file;
Import	Import all the rules into DataDirector Authorization

Navigation Pane

DataDirector Admin

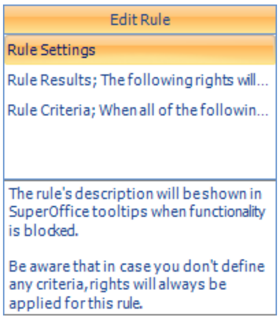
DataDirector Admin
Opens the default status window

- **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.

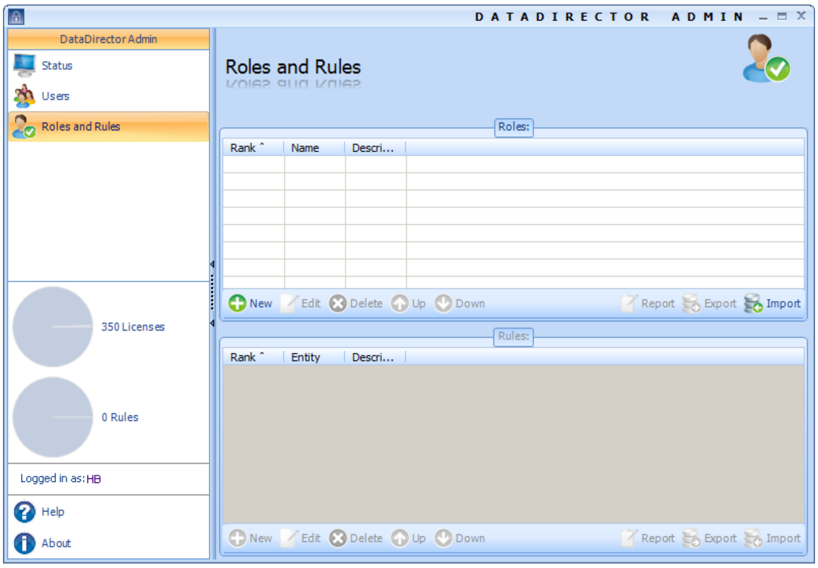
- **Rule Settings**; here you can specify the entity the rule applies to.
- **Rule Result (The following rights will be applied)**; Here you can set the rule results for the selected entity.
- **Rule Criteria**; here you can set the specific criteria for the selected entity.

DataDirector Configuration

Roles

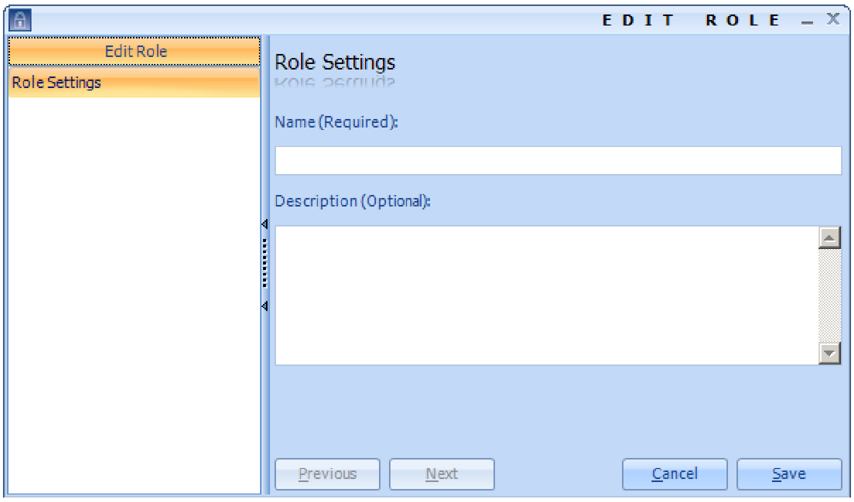
Create a role
Within a role the rights are defined; these rights are configured in a rule.

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

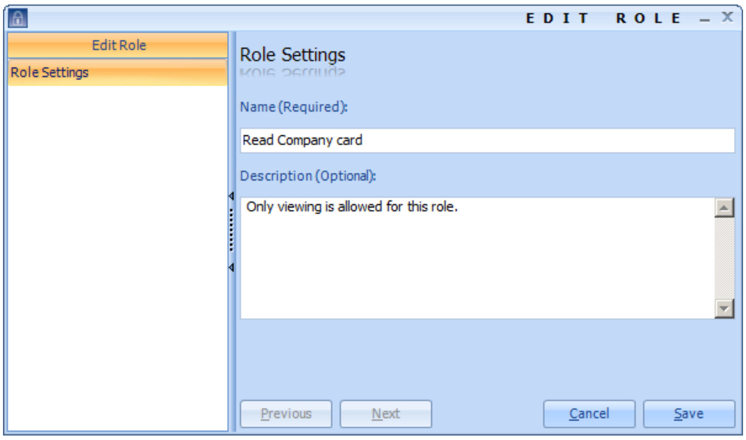


How to create a role?

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.

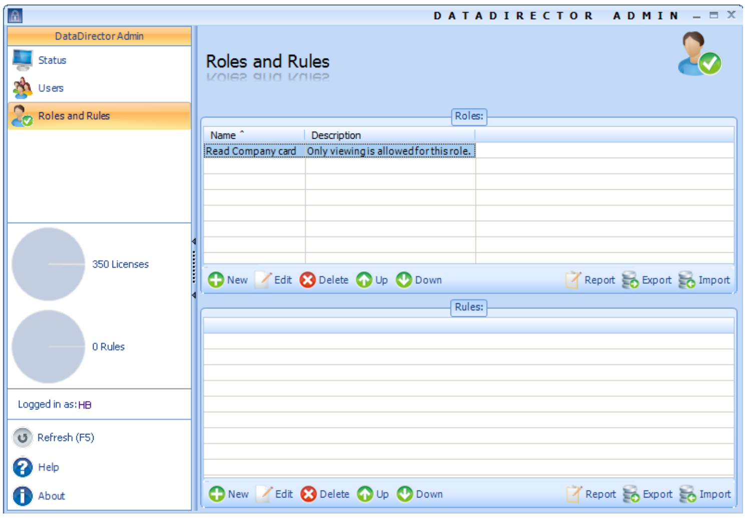


4. Give the role a name (choose the name carefully in case of maintenance). This is required;
5. Give the role a meaningful description;



6. Press the "Save" button.

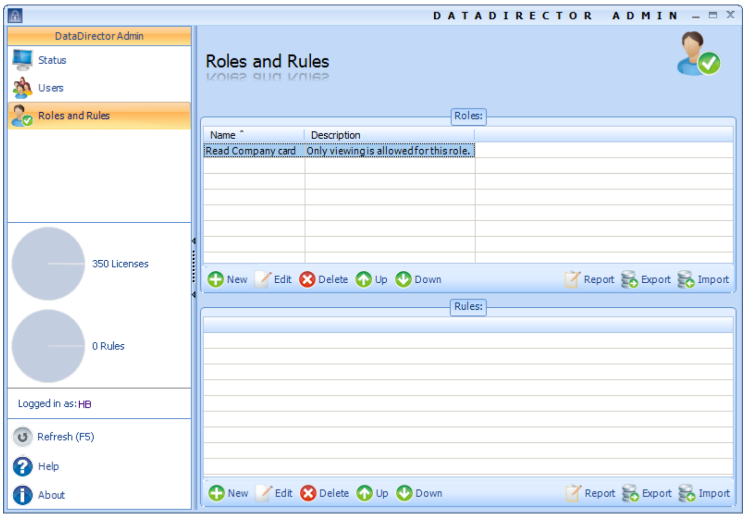
After you have saved the role the dialog is closed and the role is added to the Roles list.



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

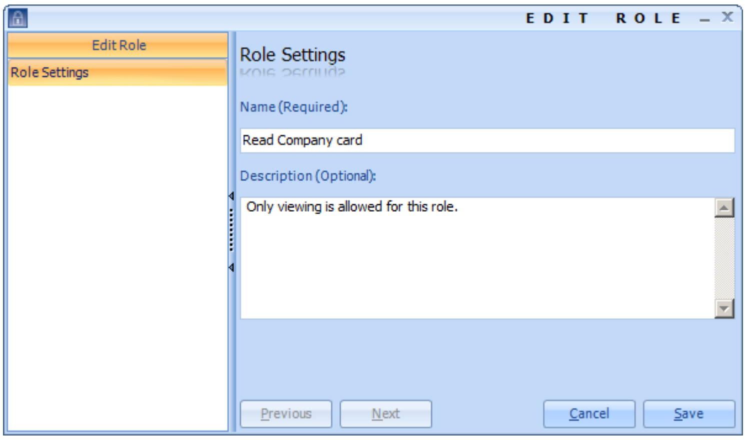
Edit a role

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



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;



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

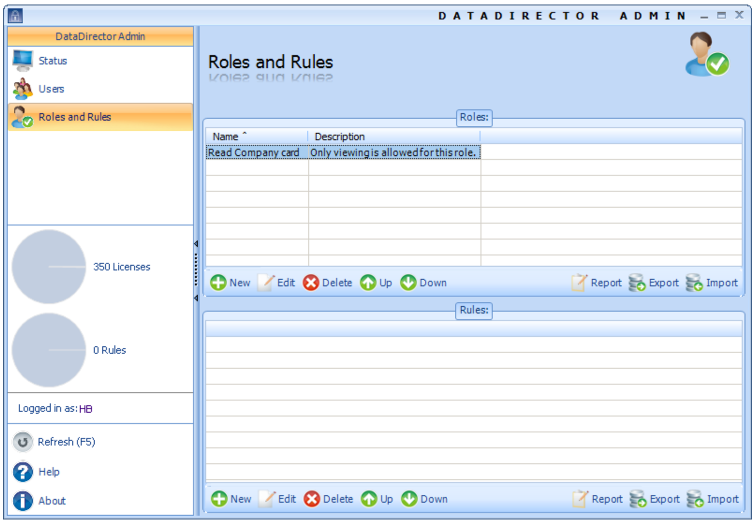
After you have saved the role the dialog is closed and the role is refreshed in the Roles and Rules list.

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.



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.
5. 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?

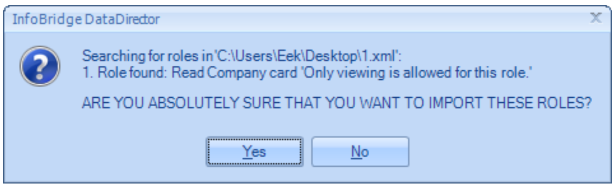
1. Select the "Roles and Rules" menu item in the navigation pane.
2. Select the role or roles you want to export (hold the CTRL or SHIFT button to select more than one role).
3. Press the "Export" button.
4. A save dialog will appear.
5. Give the export file a descriptive name.
6. Press "Save".
7. You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

Import a role

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

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;

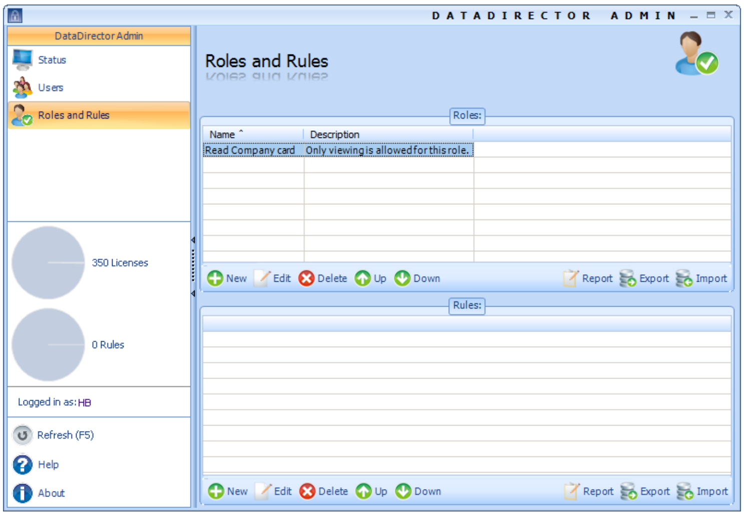


6. If you are sure you want to import the roles press "Yes", else press "No";
7. You see that the roles appear in the screen Roles and Rules; also the depending rules are imported;
8. You are done importing roles.

Rules

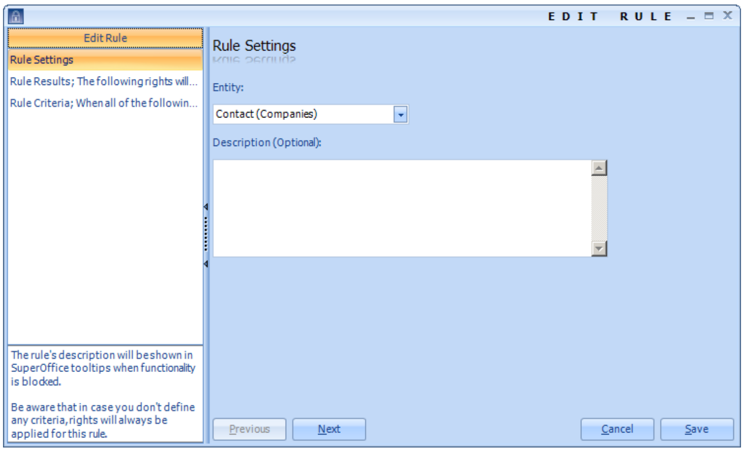
Create a rule

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



How to create a rule?

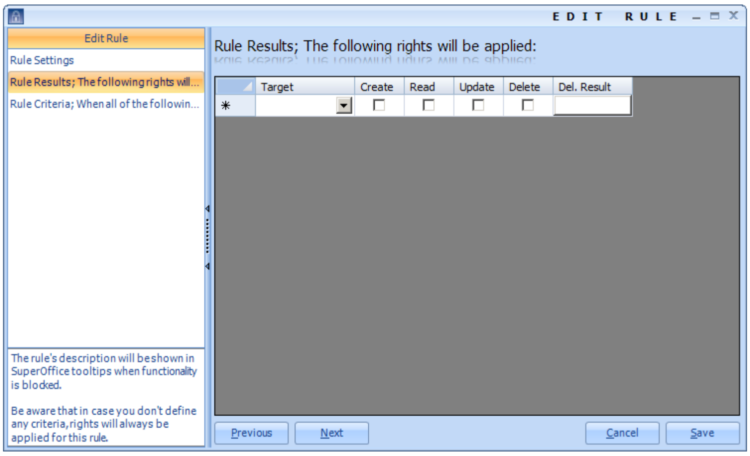
1. Select the "Roles and Rules" menu item in the navigation pane;
2. Select the Role where you want to add the rule or rules too;
3. Click on the "New" button in the 'Rules' part of the window;
4. The rule dialog will be shown;



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);

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



9. 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**'.

10. 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**', '**Update**' and '**Delete**'

	Target	Create	Read	Update	Delete	Del. Result
▶	contact.name, Name	☐	☑	☑	☐	Delete
*		☐	☐	☐	☐	

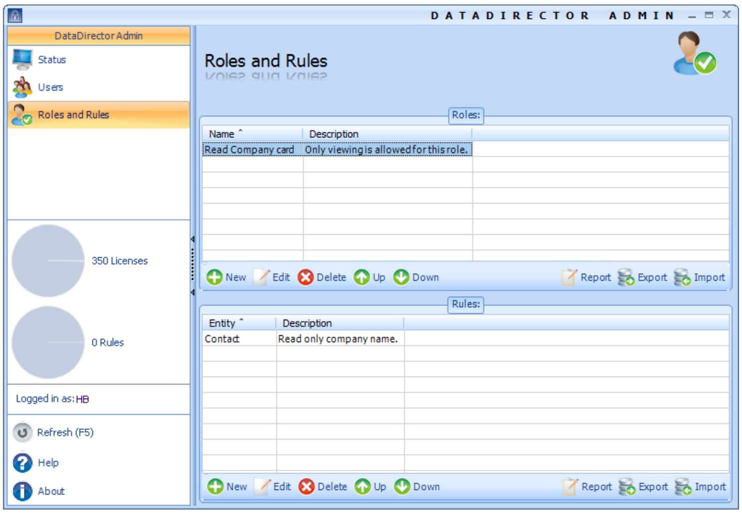
REMARK

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;

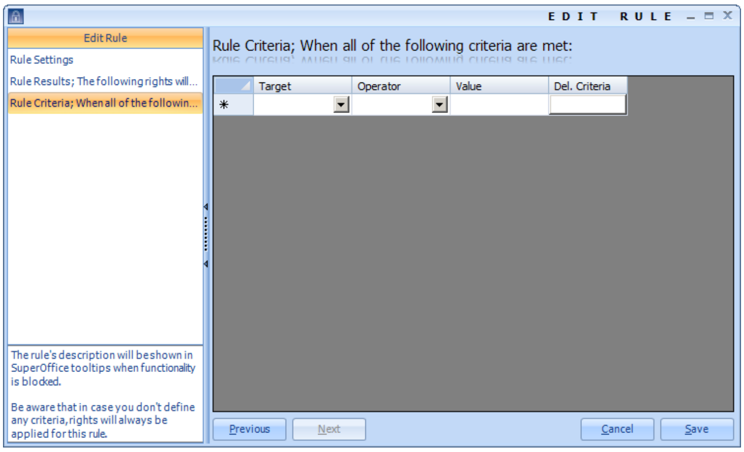


Test the rule in SuperOffice and you see that the user can't change the name of the company when you are in SuperOffice edit mode.

Setting Rule Criteria

REMARK

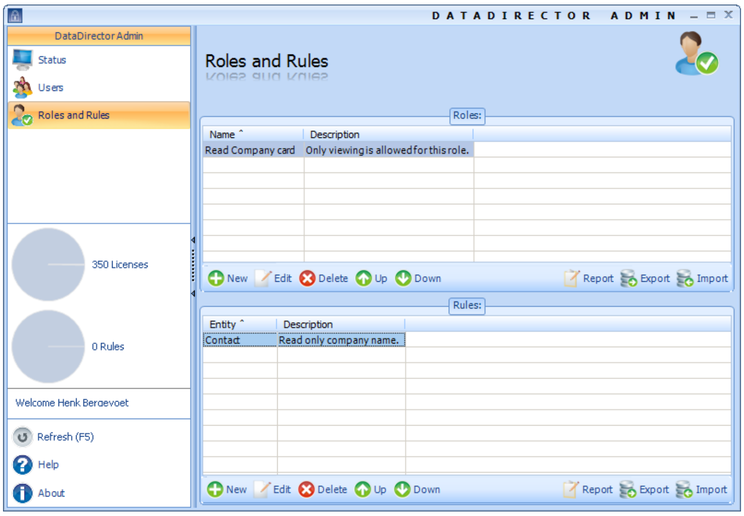
You don't have to set the Rule Criteria if the rule is not depending on any criteria.



12. When you want to set special criteria for the field you selected earlier select Rule Criteria from the navigation pane;
13. 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

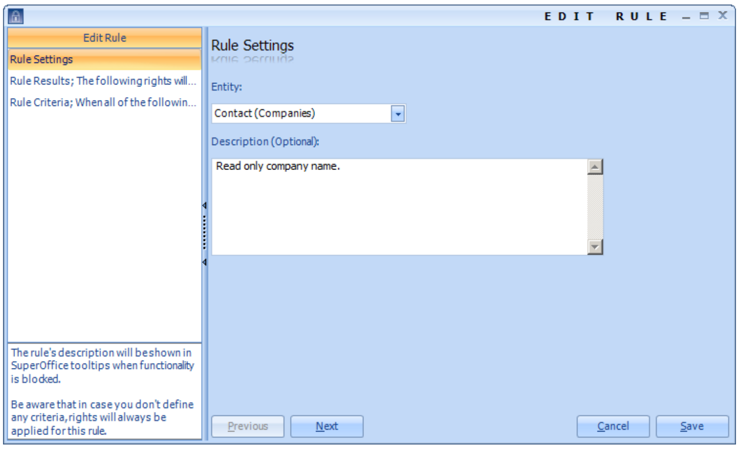
Once a rule is created it is still possible to change the rule and the security that the rule holds.



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;



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.

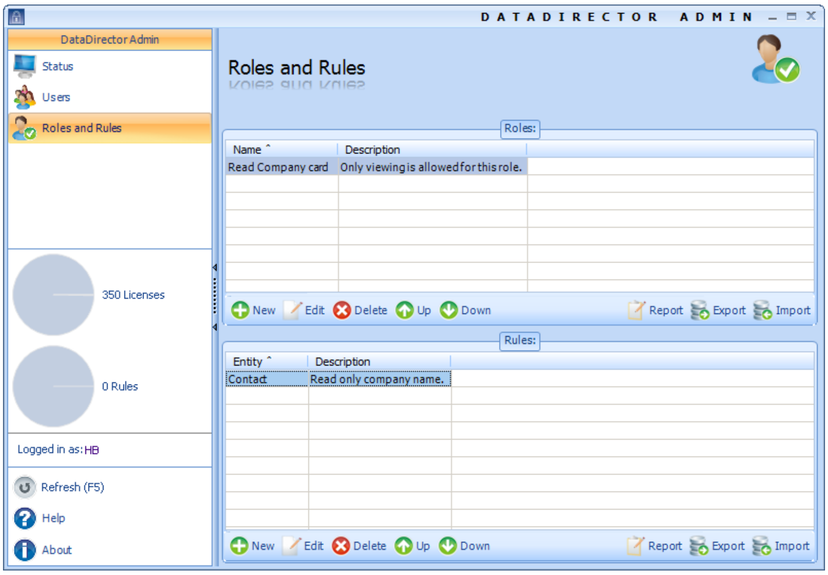
After you have saved the rule the dialog is closed and the rule is refreshed in the Roles and Rules lists.

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.



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)

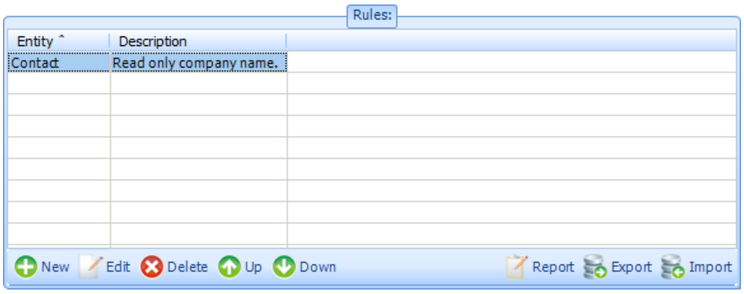
4. Press the "Delete" button;
5. A message will appear to inform you that you are deleting a rule;
6. If you are aware of the consequences you are going to take press "Yes", else press "No".

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.

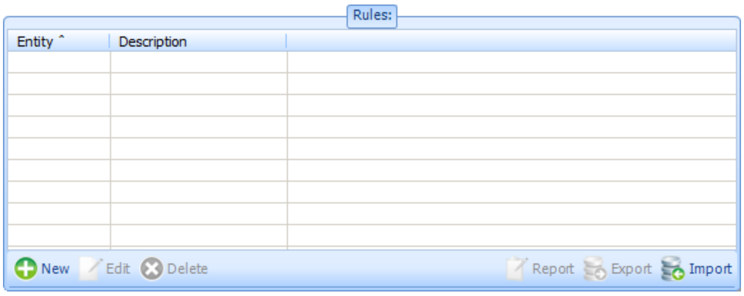


How to export a rule?

1. Select the "Roles and Rules" menu item in the navigation pane;
2. Select the role that holds the rule or rules;
3. 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.



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.

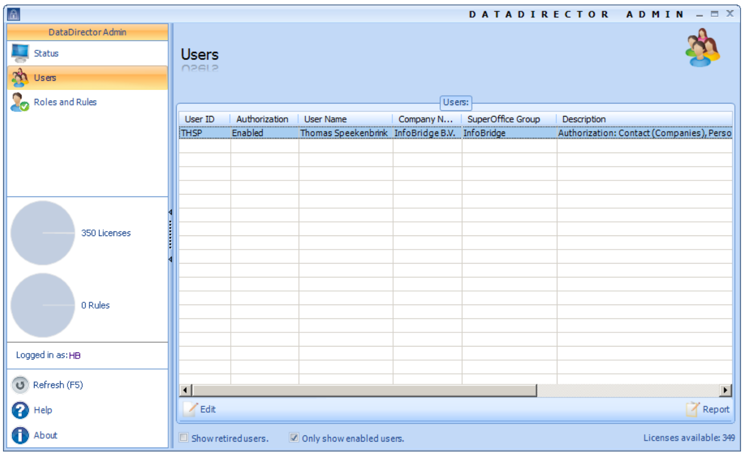
NOTE
You can combine the rules as follows:
When you have created a rule "No change allowed if the sale amount is greater than 50.000" you can add another rule like "Changes allowed if the sale amount is below 100.000". Then you have an "IF" statement.

Enable DataDirector Roles

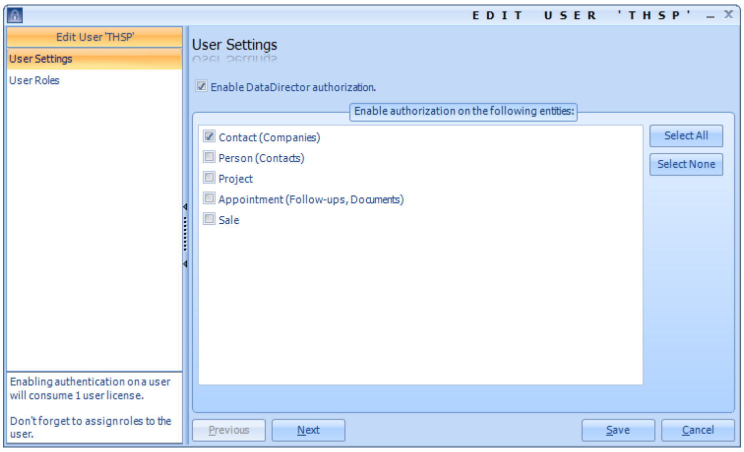
To activate the role and the accompanying rules for the selected user follow the steps below.

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

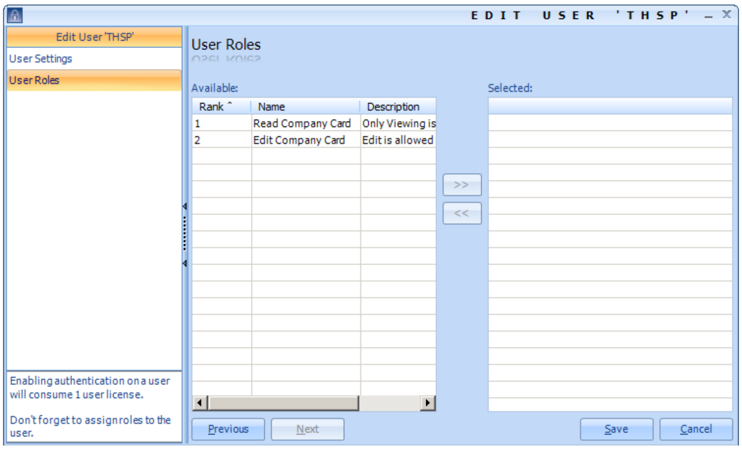
1. Select the user option in the DataDirector Admin.



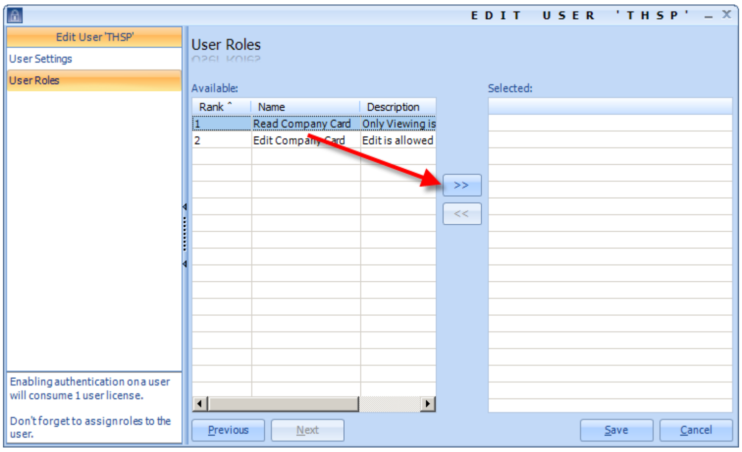
2. Double click on the user you want to activate.



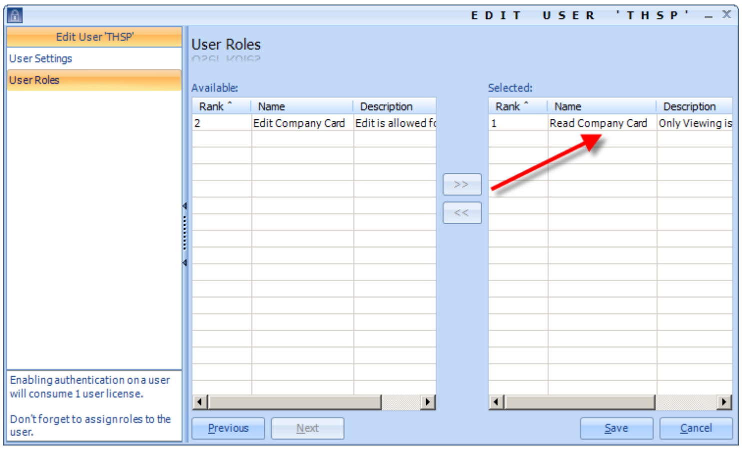
3. Select "**User Roles**".



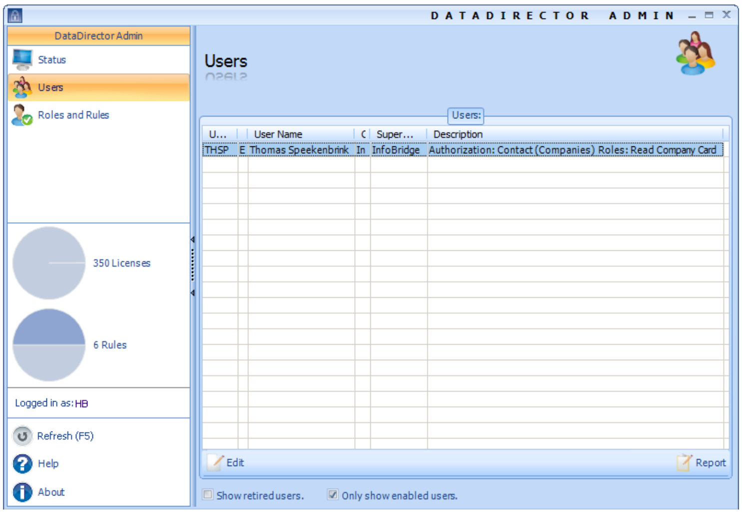
4. Select the role you want for the selected user;



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.

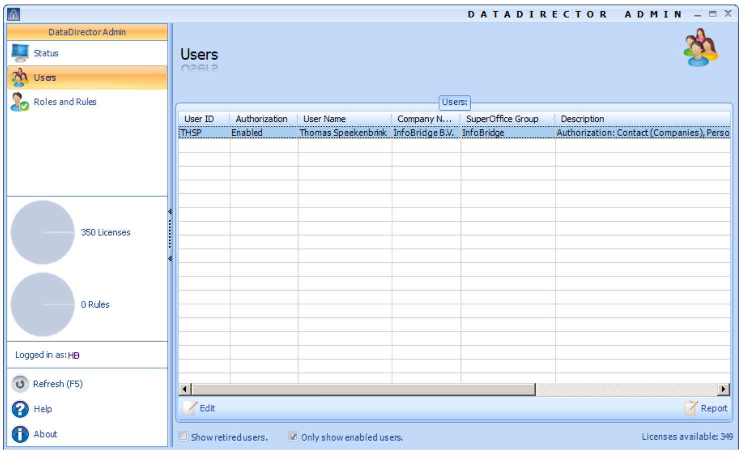


When you return to the main screen of the **DataDirector Admin - Users** you can see in the description of the user what role and rules are enabled for the selected user.

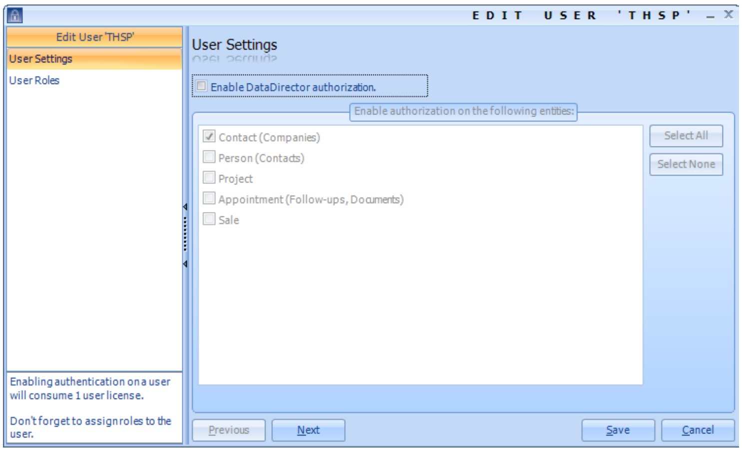
Disable DataDirector Roles

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;



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



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

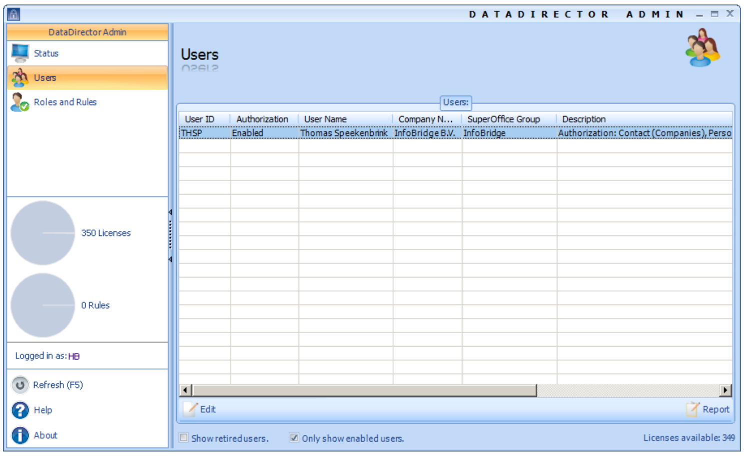
When you return to the main screen of the **DataDirector Admin - Users** you can see in the description of the user that the role is removed.

DataDirector Reports

User Report

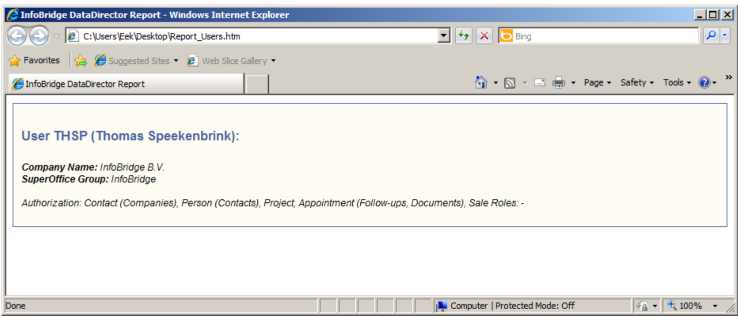
For documentation purposes it is possible to create a report of all the users that have authorization set in DataDirector Admin.

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



How to create a report of users and their authorization?

1. Select the "Users" menu item in the navigation pane;
2. 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;



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

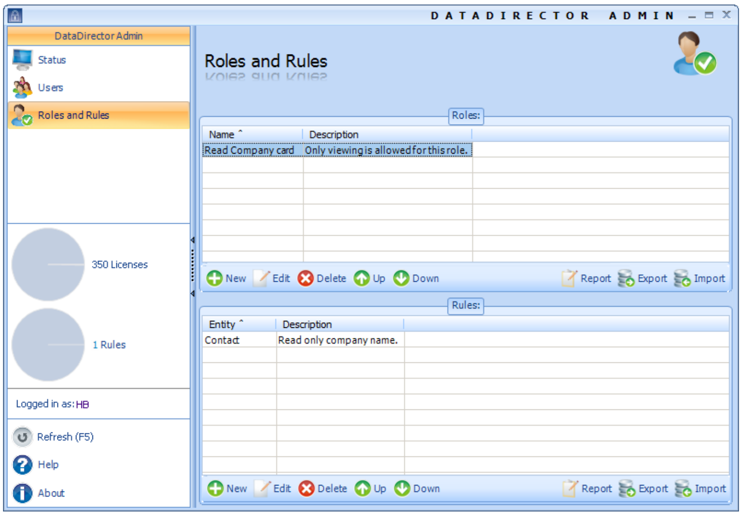
Role Report

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

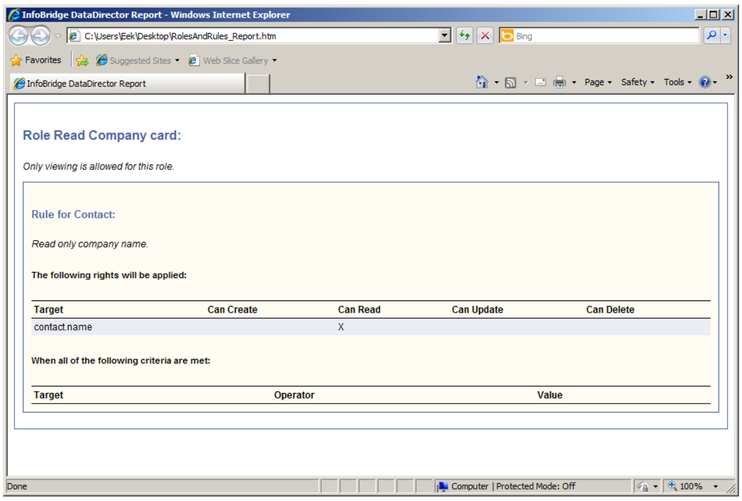
The following reports of Roles and Rules you can be generated:

- Roles associated with their rules;
- Rules only.



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

1. Select the "Roles and Rules" menu item in the navigation pane;
2. 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;



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

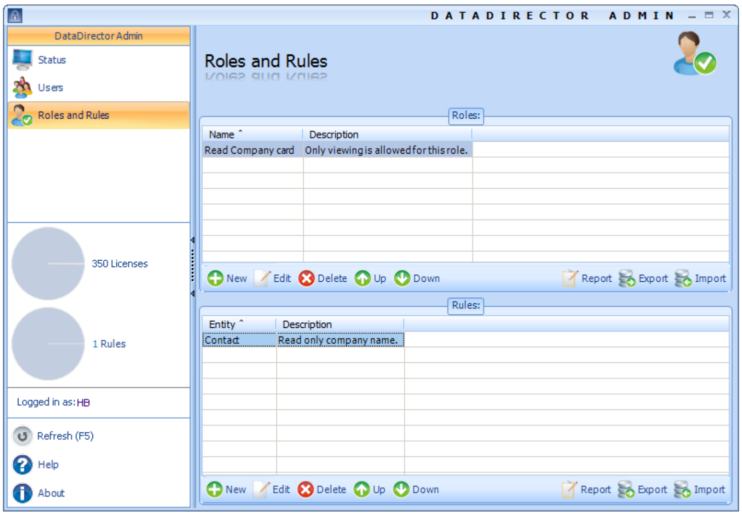
Rule Report

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:

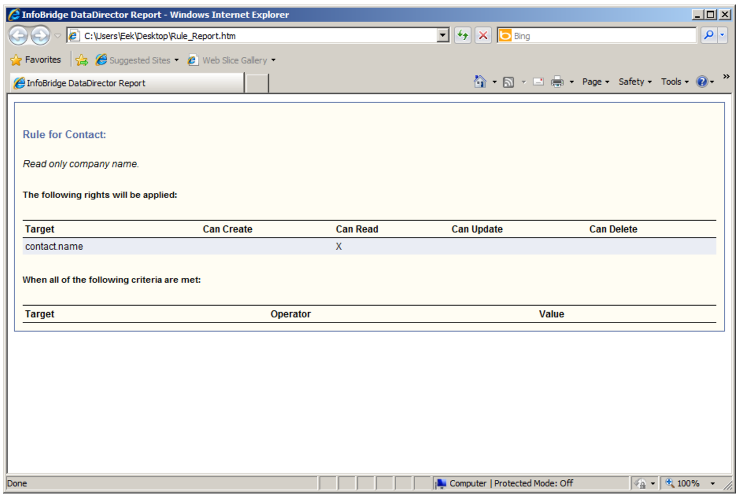
- Roles associated with their rules;
- Rules only.



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;
3. 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

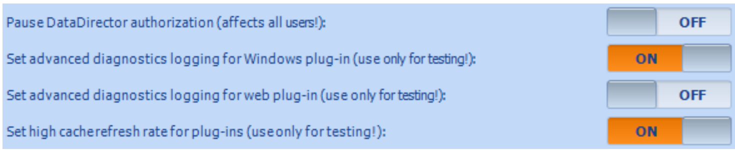


9. You are done creating a report of the rule with all the associated rights

DataDirector Options

Options

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



- Pause DataDirector authorization (affects all users!):

  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

home page	:	www.infobridge.com
knowledge base	:	http://kb.infobridge.com
support e-mail	:	support@infobridge.com
support phone	:	+31 (0)88 - 2762444