



SuperOffice DataDirector Suite





DataDirector Authorization

The flexible way to create user defined access levels.

One of the core components offered by DataDirector Suite is its powerful Authorization engine which offers user definable access levels or access roles.

DataDirector provides security levels on Company, Contact, Project, Sales, Appointments and Documents. These rights can be managed for the entire record, individual fields and User Defined Fields.

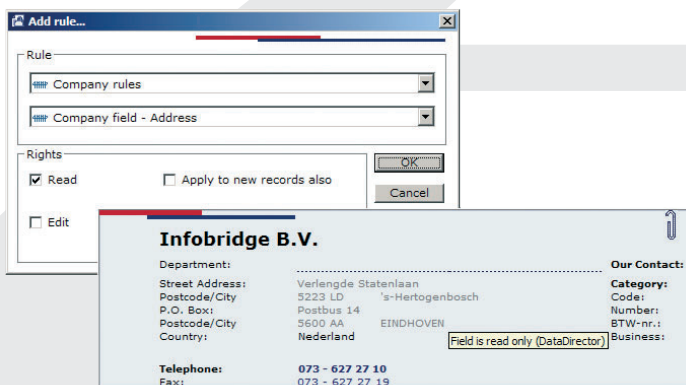
The user defined access levels can be controlled through several criteria based on the data of the corresponding or related record or just set to each record or field.

To create or edit the access levels is as easy as using SuperOffice's Administration client. All that is required is to create a group or role and add rules to it. Each rule describes access right and adds the result to the group or role. The access levels are linked to the SuperOffice user level and group to provide maximum flexibility.

- Set read, edit and delete rights to all Sales that don't belong to the logged-on user.
- Set read, edit and delete rights to all Documents that are linked to a Project where the logged-on user is not a Project member.
- Set read and edit rights to the address fields on each Company record.
- Set read and edit rights to any user defined field on each Sales record.

All access rights are configurable per user, per user group or per role and are fully compatible with both CRM 5 for Windows and CRM5.web.

The list printed below describes the most important differences between the User Level system of SuperOffice and the configurable access levels within DataDirector.



A few examples off the available rules:

- Set read, edit and delete rights to all Companies that are assigned to one of the predefined Categories.
- Set read, edit and delete rights to all Projects that are assigned to one of the predefined Types.

Access Rights	User Levels	DataDirector
Disable inserting companies	Yes	Yes
Disable deleting companies	Yes	Yes
Disable deleting companies based on criteria*	-	Yes
Disable editing companies	Yes	Yes
Disable editing companies based on criteria*	-	Yes
Disable viewing companies	-	Yes
Disable viewing companies based on criteria*	-	Yes
Disable inserting persons	-	Yes
Disable deleting persons	-	Yes
Disable deleting persons based on criteria*	-	Yes
Disable editing persons	-	Yes
Disable editing persons based on criteria*	-	Yes
Disable viewing persons	-	Yes
Disable viewing persons based on criteria*	-	Yes
Disable inserting projects	Yes	Yes
Disable deleting projects	Yes	Yes
Disable deleting projects based on criteria*	-	Yes
Disable editing projects	Yes	Yes
Disable editing projects based on criteria*	-	Yes
Disable viewing projects	-	Yes
Disable viewing projects based on criteria*	-	Yes
Disable inserting appointments, documents and sales	-	Yes
Disable deleting appointments, documents and sales	Yes	Yes
Disable deleting appointments, documents and sales based on criteria*	-	Yes
Disable editing appointments, documents and sales	Yes	Yes
Disable editing appointments, documents and sales based on criteria*	-	Yes
Disable viewing appointments, documents and sales	Yes	Yes
Disable viewing appointments, documents and sales based on criteria*	-	Yes
Disable editing data of standard fields**	-	Yes
Disable viewing data of standard fields**	-	Yes
Disable editing data of user defined fields***	-	Yes
Disable viewing data of user defined fields***	-	Yes

* The criteria the access right can be based on, are values from default lists, number ranges or date ranges. Contact us for a complete list of configurable access rights.

** Virtually all standard company, person, project, appointment, document and sale fields.

*** All user defined fields from company, person, project and sale.



DataDirector Workflow

The solid way to ensure data quality, ensured follow-up and user-friendly registration.

One of the critical issues that makes or breaks a CRM implementation is the use of it by the users. Many CRM implementations have failed because of the fact that users find it to hard to put in all kinds of data and register and check each detail. A lot of sales opportunities are lost through lack of registration of follow-ups and maybe even more mailings ended up in the garbage container because it was sent to someone that wasn't interested.

Your business contains rich amounts of information on your customers, prospects, partners and suppliers. Within the massive heaps of data, how do you identify critical information that requires immediate attention?

One of the core engines offered by DataDirector Suite is the Workflow engine which offers automated generation of pre-defined actions.

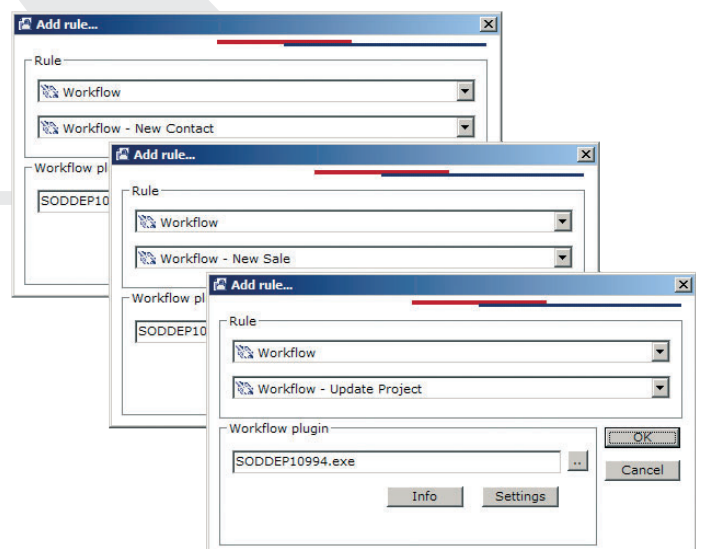
The actions that can be triggered by one of the SuperOffice clients upon inserting or updating data are virtually unlimited: you are in charge!

DataDirector Workflow ensures data quality by checking values and generating follow-ups. It ensures user-friendly registration by automating all kinds of input that is normally done by the users and automating e-mail or reporting. It also monitors your business' systems and automatically assigns the appropriate people to take action. Saving everyone time and making sure no lead or customer slips through the cracks.

Each DataDirector Workflow definition is delivered as a plug-in that holds the generic or custom logic.

A few examples of generic DataDirector Workflow plug-ins:

- Generate follow-up after adding or editing a Sale.
- Generate follow-ups for customers that haven't placed an order for one month.
- Generate (groups of) follow-ups after adding a Project of a certain type.
- Generate (groups of) follow-ups after completing an appointment.
- Generate a Person after adding a Contact with a certain Category (B2C).
- Generate XML output after adding a new Company.
- Update a Selection after adding or editing a Person.
- Send e-mail after adding a Sale.
- Send e-mail when a task is due for a certain number of days.



DataDirector Workflow is configurable per user, per user group or per role and is fully compatible with both CRM 5 for Windows and CRM5.web.



DataDirector Suite, a new dimension in data management

DataDirector adds solid data management functions to SuperOffice CRM 5. DataDirector Suite introduces new and exciting ways to create your own security levels and automated actions or workflow definitions.

DataDirector Suite offers two core engines that are both based on standard SuperOffice technology which ensures compatibility with all current and future SuperOffice clients.

DataDirector Authorization

The standard SuperOffice user levels are not suited for every organization. The provided access levels are basic and combinations of access rights are not possible.

DataDirector Authorization provides access control that can be managed for entire records or individual fields. Create your own security levels that are as flexible as your organization needs. Create role-based access levels on company or project cards. Provide read-only access to address fields. Hide sales records that don't belong to a group of users. Or control access to documents that are linked to a confidential project. All without having to deal with the SuperOffice User Levels. It's that simple!

DataDirector Workflow

DataDirector Workflow ensures data quality by checking values and generating follow-ups. It ensures user-friendly registration by automating all kinds of input that is normally done by the users.

Automating e-mail or reporting is another powerful function that is built in DataDirector

Workflow engine. The actions that can be triggered by one of the SuperOffice clients upon inserting or updating data are virtually unlimited.

In the near future more engines will be added to DataDirector Suite to make working with SuperOffice even easier and user-friendly.

Compatibility

DataDirector is based on standard SuperOffice technology and supports all databases that SuperOffice supports and both CRM 5 for Windows and CRM5.web. DataDirector is compatible with SuperOffice Travel, Remote Travel and Satellite Management.

- **Compatible with SuperOffice CRM 5 for Windows, CRM5.web, Travel, Remote Travel and Satellite.**
- **Easy installation using existing and proven SuperOffice technology.**
- **Design access rights on virtually all SuperOffice dialogs and fields**
- **Design data dependent and role based authorization levels.**
- **Ensure data quality and generate follow-ups.**
- **Monitor your business' systems and automatically assign actions.**



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