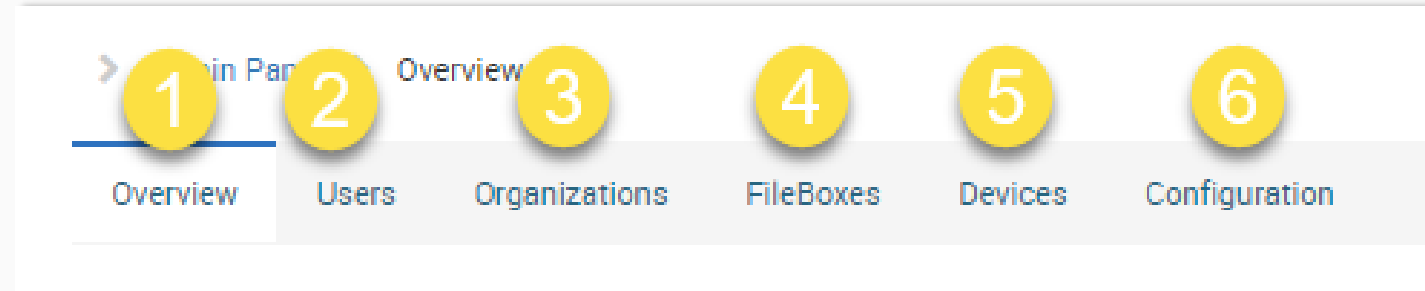




Organizational Admin Role and Permissions

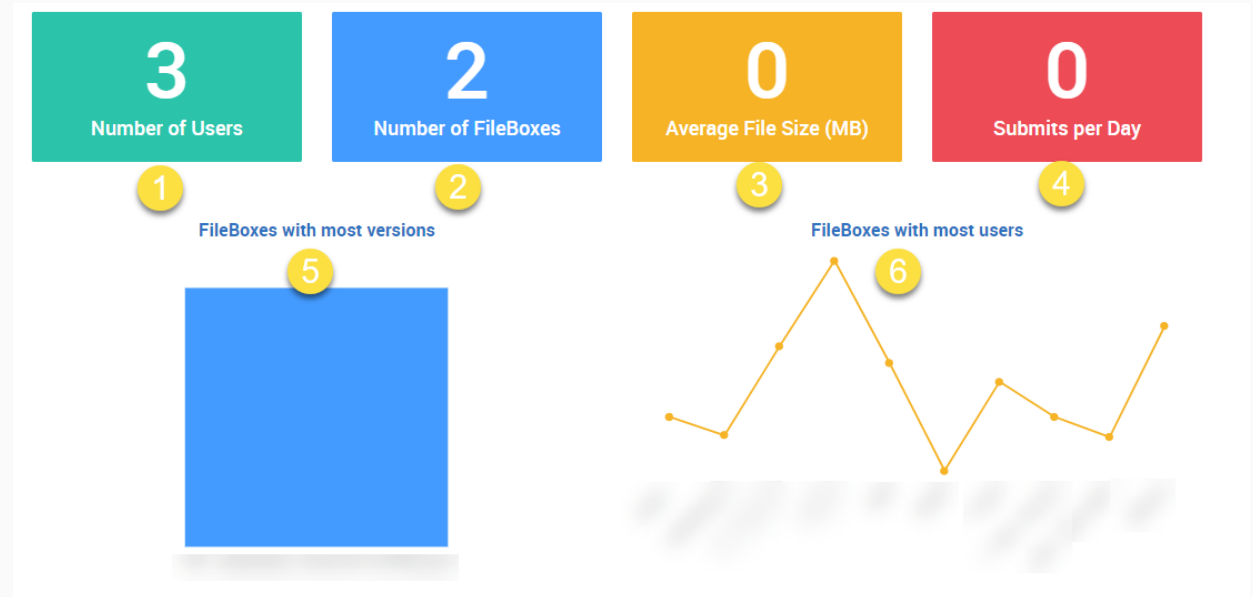
Views

- Overview
- Users
- Organizations
- FileBoxes
- Devices
- Configuration (only relevant for DataRails Admin)



Overview

1. Number Of Users Registered to DataRails
2. Number of Fileboxes that exist in your Organization
3. Average File Size (average in last 10 days)
4. Number of submitted versions per day (average in last 10 days)
5. FileBoxes with most versions
6. FileBoxes with most users collaborating on



Users (View)

ID ▲	1 Organization	2 Full Name	3 Email	4 Active	5 Created	6 Shared	7 Last submit	8 Last login	9 Online	Devices	Actions
------	-------------------	----------------	------------	-------------	--------------	-------------	------------------	-----------------	-------------	---------	---------

Search Add new user 10

1. Your Organization Domain
 2. Name of User (as submitted during signup)
 3. User's Email
 4. Displays Active as: True if User has completed registration (Full name and Password), OR False if User has yet to register
 5. How many FileBoxes the User Created
 6. Shared – How many FileBoxes the User is collaborating on
 7. Last time the User submitted a file to DataRails via either the web or the desktop application
 8. Last time the User logged in to DataRails – via either the web or the desktop application
 9. Is the user currently online
 10. Add New User – Add users from your organizational domain to DataRails
- You can also see how many devices are connected by the User

Users (Actions)

1. Edit User Details (Name and EMail)
2. Reset Password (Sends a Reset Password Link to the registered EMail)
3. Edit permissions (Assign roles to users, & determine if users can see the DataRails Badge for disconnected Excel Files)
4. Edit Permissions Filter (Define what data a user can gain access to – Relevant for Mapped Data Only) **
5. Lock User (Disable / Enable a user's access to the system)
6. Login As – Allows to login to DataRails Web App as the user





- ** A Detailed Guide Can be found at the end of this documentation

Actions

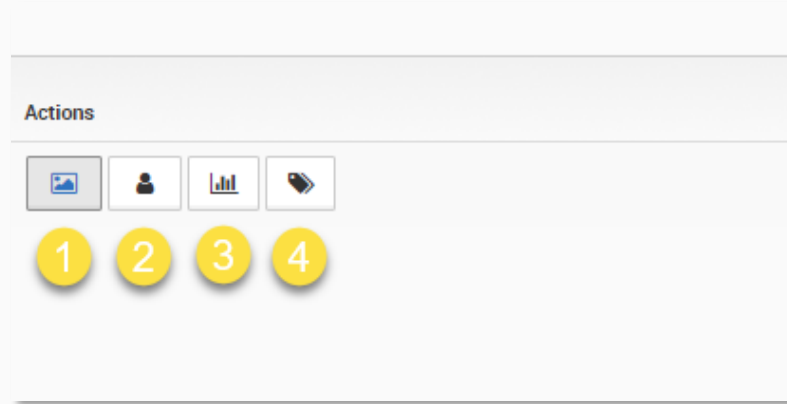


Organizations (View)

1. Organization Name
2. Organization Domain
3. Parent Organization
4. How many users are registered to DataRails
5. How many documents are connected to DataRails

ID ▲	Name 1	Domain 2	Parent 3	4 Users	Documents 5	Actions
2				185	4199	   

Organizational (Actions)



1. **Customize your Logo**
2. **Organization Settings and Permissions (Detailed in next Slide)**
3. **Customize Color Chart**
4. **Chose default tags (for file upload & submission)**

Organizational Settings & Permissions

Change Organization Permission

Show Homepage (old) NO YES **1**

Show Dashboards YES NO **2**

Show Home Page YES NO **3**

Show Badge in not trusted files NO YES **4**

Connect file to exits FileBox NO YES **5**

Show Tables NO YES **6**

Reconnect even already connected NO YES **7**

Show extracted tables in Badge YES NO **8**

Include all Auto Submits in versions list NO YES **9**

Save





1. Show Homepage (Old)
2. Show Dashboards
3. Show Homepage
4. Show badge in not trusted Files – Allow to hide badge in files that are not connected to a DataRails FileBox or process (“Yes” by Default)
5. Connect File to Exist FileBox – Allow users to connect any file to a new FileBox or DataRails Process (No by default)
6. Show Tables
7. Reconnect even already connected – Allow users to connect a file that is already linked to DataRails to a new FileBox or process (“No” by default)
8. Show extracted tables in Badge
9. Include (visually) all Auto Submitted versions within a FileBox (no by default)

FileBoxes (View)

1. Name of FileBox
2. Organization Domain
3. Creation date of FileBox
4. Owner's Email Address
5. Number of Collaborators
6. Number of Versions Submitted to FileBox
7. Last Version Submit date and time

ID ▲	Name	Organization	Date Created	Owner	Users	Versions	Latest submit
3548	1	2	08/01/2017 3:19PM 3	4	5	6	08/01/2017 3 7

FileBoxes (Actions)

Colaborators	# of vrsions	Latest submit	Actions
1	3	10/15/2017 1:22PM	 
1	2	10/15/2017 2:09PM	 

1 2

1. Download latest version of file
2. Batch Update Versions – Resubmits all versions one by one to a FileBox


Devices (View)

1. Computer Name
2. Machine ID
3. User associated with device
4. Last Login
5. Version of DataRails Installed
6. What version has been chosen to Upgrade to
7. Socket Status (relevant for DataRails Admin Only)
8. Valid Badge Certificate (relevant for DataRails Admin Only)

<input type="checkbox"/>	Machine Host ▲	Machine ID	Users	Last Login	Current Version	Version for Update	Is Socket Polling	Valid Badge Certificate	Actions
<input type="checkbox"/>	1	2	3	09/19/20 9:35AM 4	5	6	7	8	i ↺

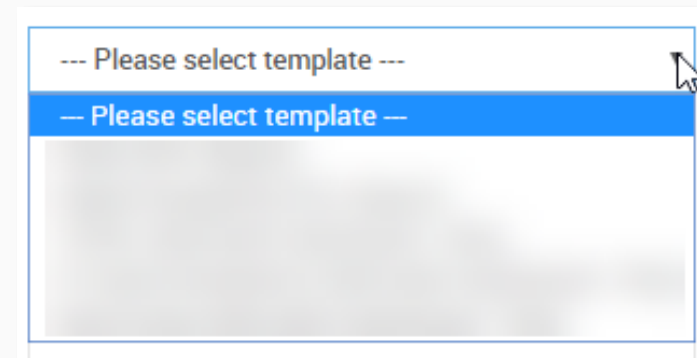
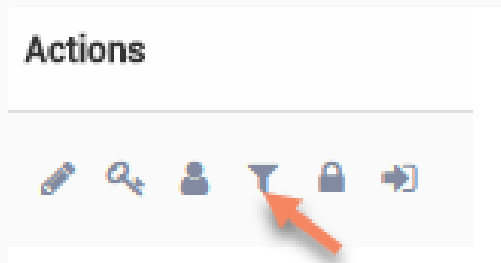
Devices Actions

1. Device system info (OS, Hardware etc.)
2. Upgrade version – You can chose which version to upgrade the device to:
 - Immediate – push (installs) the upgrade instantly when a user is signed in
 - On Idle - Will only push (installs) the upgrade when Excel is not running and a user is signed in

		Actions
false	true	 
false	false	 

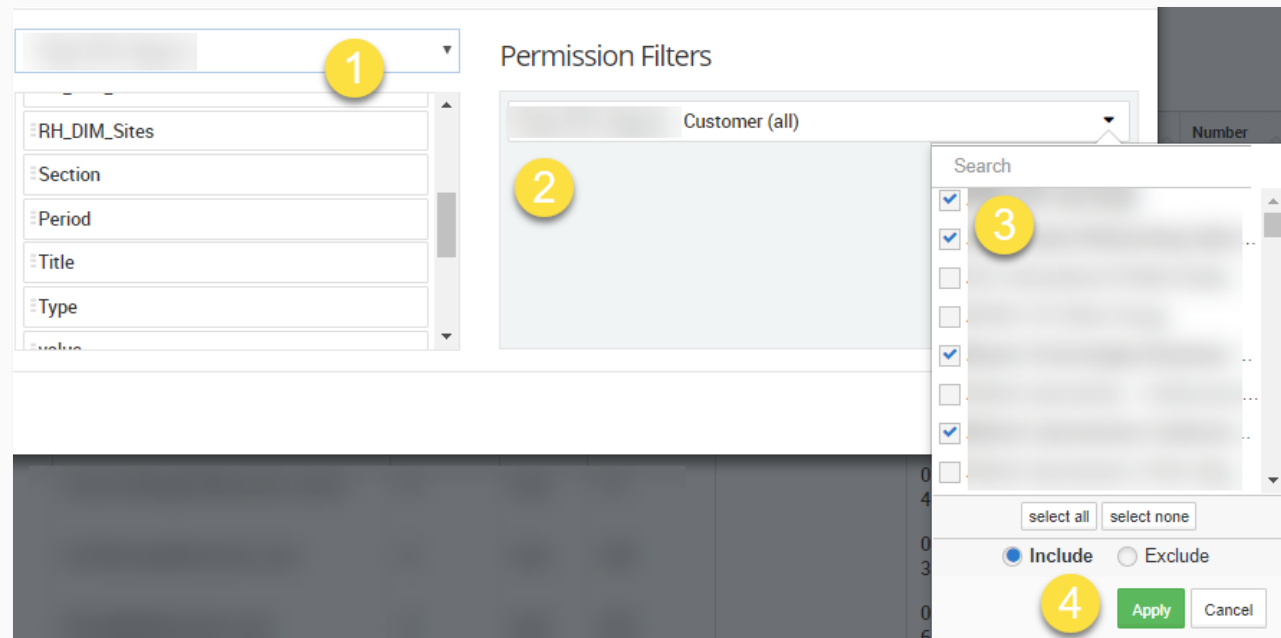
Restricting Data Shared With Users

- Any of the FileBox and/or Dashboard Owners can share data with any user.
- When sharing Dashboard views, one can define what data is permitted for the user to be exposed to by following these steps :
 - Share the chosen Dashboard with the user from the Dashboard tab
 - Login to the Admin Panel, and locate the user in the “Users” view
 - Click the “Edit Permissions” Filter and chose the relevant template



Restricting Data Shared With Users

- A list of all the fields available to view in the dashboard will appear
- Drag the relevant fields to the pane on the right
- Open the drop down menu from each field
- Select/deselect the data the user has access to and click Apply
- Click Save



THANK YOU