Data-Level Security Setup Document

Date: March 20th, 2020

Applicable to: informXL Analyzer and informXL Datamart, versions 4.0 and higher

Introduction

Company and Project data-level security was introduced as an *optional feature* with informXL Analyzer and informXL Datamart version 4.0. This feature utilizes the Company and Project data level security settings within NEWSTAR Enterprise. When enabled in both informXL and NEWSTAR Enterprise the data returned within informXL is restricted to the Companies and/or Projects the user has been granted access to within NEWSTAR Enterprise.

Requirements – Analyzer

The informXL Analyzer requirements to utilize either Company or Project level data-level security are as follows:

1. Users must be setup in NEWSTAR ENTERPRISE with the appropriate assigned Company / Project security. This includes users that do not log into NEWSTAR Enterprise but use informXL Analyzer.
2. All user NEWSTAR Enterprise user ID's (i.e. login names) must be the same as the respective Windows login name. For example, if a user logs into NEWSTAR Enterprise as "jsmith" that same user's Windows login name must also be "jsmith".
3. Security settings must be enabled in informXL Analyzer. To enable security, please contact our Support team (support@informxl.com) for instruction and assistance.

Requirements – Datamart

1. When Company or Project security is enabled in informXL Analyzer a user operator with username "datamart" must be setup in NEWSTAR Enterprise. This is the user id that Datamart uses to access the NEWSTAR data. Any preferred password may be configured for this user id.
2. This user must be granted access to the respective Companies and Projects within NEWSTAR Enterprise for which data is to appear in Datamart. (This user is typically associated with access to *all* Companies and Projects, though this may be limited if necessary).
3. Following setup of this user in Datamart, the next scheduled refresh should include "Full Refresh – Run Once" for all active Datamart tables.

Security Scope

Company and or Project security in informXL may be enabled in independently of one another. Once either setting is enabled within informXL it will be applied to the Analyzers and Datamart tables as follows:

Company Security	Accounts Payable, Checks, GL Balance
Project Security	Job Cost Details, Job Scrub, Lot Details, Lot Options, Lot Schedules, Model Estimate, Parts, PO Details, Sales Summary NSE, Sales Summary NSS, Start Scrub, Subcontract Details, Takeoff Margin, Warranty Details
No Security	Prospects, Suppliers, AP Details (discontinued), RE Agents (discontinued)