



# Administration Help

Fabasoft Cloud

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## 1 Introduction

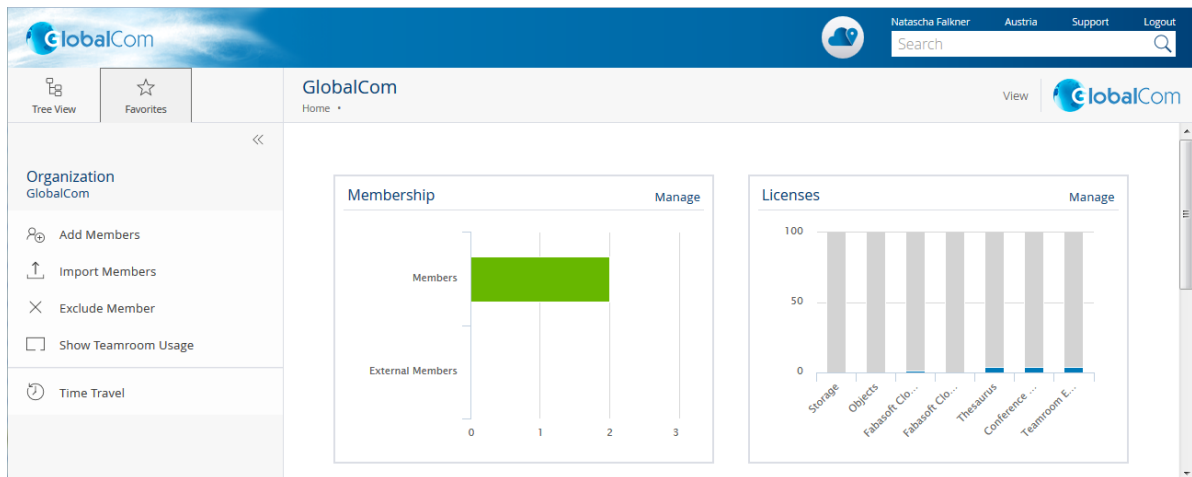
The Fabasoft Cloud lets you create a digital business network for your company based on relationships of trust – for secure cross-company, transnational collaboration in the cloud.

## 2 Organization

In the Fabasoft Cloud you act as organization. Via the organization you can carry out all the relevant administrative tasks. The management tasks include, for example, the administration of members the assignment of service packages and defining the authentication settings.

All organizations of which you are owner, payment user or administrator are automatically placed on “Home”.

Click the organization to open the organization dashboard. In the tools area you can directly execute frequently needed actions. The content area provides an overview of the organization.



### Note:

- Owners have access to all Teamrooms of the organization and thus can view all the data. Administrators can manage the organization but cannot access the Teamrooms of the organization. Chapter 3 “Organization Roles” describes how to change the roles.
- In the properties of the organization, on the “Organization” tab you can define the access protection of the organization. By default, only members may read and search the organization. If an organization is generally searchable and readable, everyone can find and read the organization and, for example, add it to Teamrooms.

## 3 Organization Roles

Via the following organization roles you can define users who are responsible for managing the organization:

- Owner and Co-Owners  
The owner and co-owners can manage the organization, have access to all Teamrooms of the organization and thus can view all the data.  
A new owner can only be entitled by the current owner. Co-owners can be defined by the owner and other co-owners.

- **Payment User**  
The payment user can purchase licenses in the cloud shop and define administrators. Only the owner and co-owners of the organization can define the payment user.
- **Compliance Manager**  
Due to legal regulations, it may be necessary to anonymize users. When a user's membership is terminated, compliance managers are notified by e-mail. The compliance managers can immediately anonymize the user or define a reminder for a specific point in time.
- **Main Administrator and Administrators**  
The main administrator and the administrators can manage the organization but have no access to the Teamrooms of the organization. The main administrator can be chosen from the administrators. If a main administrator is defined, only this administrator receives automatically generated messages that concern the organization (e.g. accepted or refused invitations). Otherwise all administrators receive these messages.  
Administrators and the main administrator can be defined by the owner, co-owners or payment user.  
The *Main Administrator* field is only visible if at least two administrators are defined.

To define organization roles, perform the following steps:

1. In the dashboard of the organization click *Advanced Settings*.
2. Click the "Define Organization Roles" action.
3. Define the desired organization roles.
4. Click "Save".

## 4 Organization Members

To allow users to access the Fabasoft Cloud, they have to be added as organization members to the organization.

The administration of members, external members, teams, organizational units and external organizations follows a uniform scheme. This allows you to quickly find your way around all areas of membership administration.

### Lists in the Membership Administration

- Lists provide an easy way to perform operations on multiple users simultaneously.
- You can cut, copy or paste users and thus efficiently define the organizational structures. For example, you can use `Ctrl + X` to remove the selected users from a team.
- The properties of users, organizational units, external organizations or teams can also be changed efficiently using column editing (`F2` key or `Ctrl + C` and `Ctrl + V`).

#### 4.1 Import Members

Via the CSV import also many members can be created comfortably.

1. In the dashboard of the organization click *Membership*, to open the membership administration.
2. Click the "Import Members" action.

3. Enter the path to the CSV file in the *Content* field.  
**Note:** Click the “Download CSV Template” button to retrieve a template that describes the necessary data structure.
4. Click “Start Import”.
5. After the import has finished, click “Next”.

The imported members are stored in the members list. In case of a re-import existing members are updated. The unique identification of the members is carried out via the e-mail address.

The “Invite Members” action can be used to send an invitation e-mail to the imported members (see chapter 4.3 “Invite Members”).

#### Data structure of the CSV file

CSV Column	Description
EMail	Log-in E-Mail Address (unique; required)
CN	Common Name (is necessary for the log-in with client certificates and has to correspond with the CN of the client certificate of the particular user)
PinPhone	Phone Number the SMS PIN Is Sent to (if not defined, the log-in e-mail address is used)
PinEMail	E-Mail Address the E-Mail PIN Is Sent to (if not defined, the log-in e-mail address is used)
PinRadiusID	RADIUS Server User Identification (if RADIUS is used, the user identification corresponding to your server configuration can be defined here)
PinOrder	Dispatch Type for Two-Factor Authentication <ul style="list-style-type: none"> <li>• MPO_SMSFIRST (SMS)</li> <li>• MPO_EMAILFIRST (E-Mail)</li> <li>• MPO_RADIUSFIRST (Use RADIUS Server)</li> </ul>
FirstName	First Name (required)
MiddleInitial	Middle Initial
Surname	Surname (required)
Title	Title
PostTitle	Post Title
Sex	Sex (possible values: SEX_FEMALE and SEX_MALE)
Salutation	Salutation

Birthday	Birthday (format: yyyy-mm-dd)
Street	Addresses (Street)
PostOfficeBox	Addresses (Post Office Box)
ZipCode	Addresses (ZIP Code)
City	Addresses (City)
State	Addresses (State)
Country	Addresses (Country)
Phone	Telephone Numbers (Business)
Fax	Telephone Numbers (Fax)
Mobile	Telephone Numbers (Mobile)
PrivatePhone	Telephone Numbers (Private)
Function	Function in the Organization
TeamKey	Import ID (of the team; if no team with the import ID is found a new one is created, otherwise the name is updated if applicable)
TeamName	Name (of the team)
AdminTeamKey	Team Administrator (possible values: <i>Import IDs</i> of the teams to be administrated separated by „ “)
Website	Website
Language	Language (spelling corresponding to the language e.g. Español; the possible values can be found in the CSV template or in the „Basic Settings“ under <i>Language</i> ; alternatively language identifiers according to ISO 639-1 can be used)
Edition	Edition (possible values: <i>Fabasoft Cloud ID</i> or reference of the edition)
Apps	Apps (possible values: <i>Fabasoft Cloud ID</i> or full reference of apps separated by „ “)
InvalidAuthMethods	Deactivated Authentication Methods (possible value: <i>AuthenticationMethodUsernamePassword</i> )
MainLocation	Main Location (possible values: <i>at, de, ch</i> ; not available in the Fabasoft Private Cloud)



InvitationSent	Invited (possible values: true, false)
ManageHome	Manage Home (possible values: true, false)
CreateTeamrooms	Create Teamrooms – All Locations (possible values: true, false)
CreateTeamrooms-LocationAustria	Create Teamrooms – Location Austria (possible values: true, false; not available in the Fabasoft Private Cloud)
CreateTeamrooms-LocationGermany	Create Teamrooms – Location Germany (possible values: true, false; not available in the Fabasoft Private Cloud)
CreateTeamrooms-LocationSwitzerland	Create Teamrooms – Location Switzerland (possible values: true, false; not available in the Fabasoft Private Cloud)
TransferTeamrooms	Transfer Teamrooms (possible values: true, false)
grpolicysearchaudit	Use Search Folders for Audit Logs (possible values: true, false)
grpolicyaddmembers	Add Members to the Organization (possible values: true, false)
grpolicyremovemembers	Remove Members From the Organization (possible values: true, false)
grorgstructmanagers	Manage Organizational Structure (possible values: true, false)
grorgunitmanagers	Manage Teams (possible values: true, false)
grpolicyaddexternal	Add External Members to the Organization (possible values: true, false)
grextorgmanagers	Manage External Organizations (possible values: true, false)
grpolicydigitalsignature	Digitally Sign Documents (possible values: true, false)
grpolicyopenonlineex	Edit Office Documents in Microsoft Office Online (possible values: true, false)
grpolicyreadonworkspace	Open or Download Content on the Workstation (possible values: true, false)
ImageName	Photo (name of the image that should be assigned)
ImageTeamrooms	<i>Fabasoft Cloud ID</i> of the Teamroom that contains the images
OverrideKeys	<p>CSV columns of properties to be overwritten separated by commas (otherwise empty values are ignored and values are added in list properties)</p> <p>For addresses, telephone numbers and organization policies following keys must be used for the related CSV columns:</p>

	address, telephone, policies (for addresses, telephone numbers the following applies: overwriting is carried out within the corresponding type, e.g. Fax; for policies the following applies: empty cell is equivalent to <code>false</code> )
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**Note:** To add several addresses or assign members to several teams, more lines with the same e-mail address (`EMail`) can be specified.

## 4.2 Add Members

In addition to the CSV import, members can also be created and managed individually.

1. In the dashboard of the organization, click *Membership* to open the membership administration.
2. Click the "Add Members" action.
3. In the *Users* field, enter the e-mail address of the user.
4. In the drop-down menu, click an existing user to add the user as a member. If no user with the entered e-mail address exists, click "Invite new user" to create a new user.
5. To add additional members repeat step 3 and 4.
6. If applicable, select the teams or organizational units to which the users should be assigned.
7. Click the "Add" button.
8. Assign an edition and apps to users without an edition and click "Assign". This step is omitted, if all specified users already have an edition.
9. Click "Invite" to send each member an e-mail to confirm the membership. Click "Invite Later" to send the invitation later (see chapter 4.3 "Invite Members").

The added members can be further processed via the "Properties" context menu command.

## 4.3 Invite Members

If you have performed a CSV import or manually added users who have not yet been invited, you can send an invitation via the "Invite Members" action.

To invite members, perform the following steps:

1. In the organization, click the "Invite Members" action. The action is only available if members are present who have to be invited.
2. Define the recipients. For easy selection of recipients, the following recipient groups can be selected: not invited members, not registered members and members with open confirmation.
3. The fields *Subject* and *Message* are prefilled. Take any necessary adjustments.
4. Click "Invite".

**Note:** Members can also be invited to organizational units, teams and external organizations.

## 4.4 State Information

To check the state information of users, navigate in the organization in the membership administration. The state information is shown as columns by default.

- *State*  
Users can be the owner, member or external member of the organization. If the state must be confirmed by the user and the confirmation is still pending, the “Confirmation Required” state is displayed.
- *Invited*  
Shows whether the user has been invited by e-mail. The value can also be manually changed to “Yes”, if the user should no longer to be considered in the “Invite Members” dialog, for example.
- *Registered*  
Shows whether the user is registered and can therefore log into the Fabasoft Cloud.

**Note:** Users who rejected an invitation or have been excluded from the organization are displayed in the membership administration under “Exclusions”.

## 4.5 Change Membership

External members can be converted to members and vice versa.

To change the membership, perform the following steps:

1. In the dashboard of the organization, click *Membership*.
2. Navigate to the desired member or external member.
3. In the context menu of the member or external member, click “Change Membership”.
4. If applicable, select external organizations, teams or organizational units to which the user should be assigned to and click the “Change Membership” button.
5. If a member has administrative rights in the organization, you must confirm the loss of the rights.

Changing a membership removes a member from all teams and organizational units and removes an external member from all external organizations.

## 4.6 Exclude Members

Members who have been excluded from an organization are also removed from all positions, teams and Teamrooms. When excluding a member, a successor can be defined. This successor is entered in the positions, teams and Teamrooms that the user has been excluded from.

To exclude a member from an organization, perform the following steps:

1. Navigate to the desired member.
2. In the context menu of the member, click “Exclude Member”.
3. Define whether the member is to be informed by e-mail and the user is to be deactivated. If necessary, specify a successor.

**Note:** The user can only be deactivated, if the user is managed by your organization. If the user is not a member of any other organization, the user is always deactivated.

4. Click “Exclude Member” to confirm the exclusion.

Excluded members are displayed in the organization in the membership administration under “Exclusions”. Here you can also view the processing state of the exclusion.

**Note:**

- Users who have full control in the organization's Teamrooms and are members of this organization will be notified by e-mail. These users have the opportunity to re-invite the excluded user to the Teamroom, if the user is not inactive. If the excluded user is the last user with „Full Control“ in a Teamroom and no successor has been defined, the owner of the organization becomes the user with “Full Control” of the Teamroom.
- The removal of the user from the Teamroom and the adding of the successor to the Teamroom may take some time.
- When terminating a membership in external organizations, organizational units or teams, those with full control in the Teamroom are also informed by e-mail, if the Teamroom is restricted to the affected external organization, organizational unit or team.
- For Teamrooms of other organizations the following applies:
  - If the user's membership in his or her main organization is terminated, users with full control in Teamrooms of other organizations will also be informed about the exclusion and, if applicable, about the successor. The access rights can be manually adjusted by a user with full control.
  - If the user's membership in one of his or her non-main organizations is terminated, only Teamrooms that are restricted to the affected organization are handled.

## 4.7 Manage Teams

Teams are used for the informal structuring of organization members, external members and members of other organizations. For example, they can be used in Teamrooms to authorize the entire team.

To create a team, perform the following steps:

1. In the dashboard of the organization click *Membership* and then click *Teams*.
2. Click the “Create Team” action.
3. Define a name. In the *Define Team Members* field, you can add users to the team.
4. Click “Create”.

### Note:

- For teams you can define standard Teamrooms (see chapter 7 “Standard Teamrooms”).
- Organization administrators can define users who are entitled to manage teams (organization dashboard > “Advanced Settings” > “Define Policies” > “Actions” tab > *Manage Teams*).
- Organization administrators can define team administrators (via the “Define Administrators” action in the respective team). Team administrators can perform the following actions: add and remove members, release processes and forms for the team.
- For organizational units an access protection can be defined (“Properties” > “Security” tab). This way either only organization members or all users can search the team. The access protection of the organization is not inherited from the organization.

## 4.8 Define Authentication and Two-Factor Authentication

The log-in can be carried out with username and password, Digital ID, SAML 2.0, AD FS (Microsoft Active Directory Federation Services) or client certificates.

For the two-factor authentication mobile PIN (SMS), e-mail PIN and one-time password via a RADIUS server is provided. Depending on the cloud edition, not all methods are available.

To change the settings for a user, perform the following steps:

1. Navigate in the desired member and click the “Properties” action.
2. On the “Account” tab, you can define the settings regarding the authentication and second factor.
  - *Primary E-Mail Address*  
The user can log in with this e-mail address. Notifications are also sent to this e-mail address.
  - *Common Name (CN)*  
Defines the common name of the corresponding user certificate (certificate authorities have to be defined in the organization).
  - *User ID Used for RADIUS Server*  
Defines the link between the user and the RADIUS server (a RADIUS server has to be configured in the organization).
  - *Mode of Dispatch for Mobile PIN*  
Defines the primary second factor. Depending on the selected factor a phone number, a RADIUS user identification or an e-mail address has to be provided in the following fields. If several fields are filled, the user can select an alternative method when logging in.
  - *Mobile Phone Number for Mobile PIN*  
The PIN is sent to this phone number.
  - *E-Mail Address for Mobile PIN*  
The PIN is sent to this e-mail address.
  - *Deactivated Authentication Methods*  
To prevent the user from logging in using certain authentication methods, the not allowed authentication methods can be defined here. Before disabling authentication methods, make sure you do not lock out the user.
3. Click “Next” to save the changes.

**Note:**

- Only administrators and owners of the primary organization of the user can change the user data. You find the primary organization in the properties of the user on the “User” tab in the *Organization* field.
- The settings can also be defined via the CSV import.
- To enable users to log in directly with SAML 2.0 without registering, you must execute the “Register Members for SAML 2.0” context menu command on the organization. The context menu command is only available, if non-registered members with state “Member” exist and the organization is configured for the use of SAML 2.0.

## 4.9 Show Account Activities of Members

To view the account activities of members, perform the following steps:

1. Navigate to the desired organization, team, external organization or (external) member.
2. Run the “Show Account Activities” or “Advanced” > “Show Account Activities” context menu command.
3. The account activities of the member are displayed and can be downloaded via the “Export Account Activities as CSV File” button.

4. Click “Close”.

**Note:**

- Only members who are managed by you are displayed.
- If a member has never logged in, the columns in the CSV file are filled with “N/A”.

## 4.10 Manage External Members

Employees of suppliers, partner companies or customers can be added as external members to your organization. To simplify the cross-organizational cooperation even further, external organizations are available to combine and manage external members based on their company affiliation.

To manage external members, perform the following steps:

1. In the dashboard of the organization click *Membership*, to open the membership administration.
2. Within *External Members* you can import, add or exclude external members.
3. Within *External Organizations* you can create external organizations to be able to structure external members logically.

**Note:**

- When importing external members (available CSV columns see chapter 4.1 “Import Members”), the following two additional CSV columns are available in comparison to importing members: `ExtOrganizationKey` (import ID of an external organization) and `ExtOrganizationName` (name of the external organization). In addition, only the organization policies `grpolicyopenonlineex` and `grpolicyreadonworkspace` apply to external members. `AdminTeamKey` is also not available for external members.
- External members consume licenses as members.
- Editions and apps can be assigned to external members as to members.
- External members cannot create Teamrooms that are assigned to the organization.
- Only administrators and owners of the primary organization of the user can change the user data. You find the primary organization in the properties of the user on the “User” tab in the *Organization* field.
- The by default created external organization “All external members” always includes all external members, regardless of whether the members are also assigned to other external organizations.
- Administrators can define users who are entitled to manage external organizations (Organization dashboard > “Advanced Settings” > “Define Policies” > “Actions” tab > *Manage External Organizations*).

## 4.11 Manage the Organizational Structure

The organizational structure is used for the hierarchical mapping of organizational units and positions of your organization. You can find the organizational structure in your organization under “Membership” > “Organizational Structure”.

- Organizational Unit  
An organizational unit summarizes one or more positions and can contain subordinate

organizational units. The hierarchy of organizational units is defined on the one hand by the tree structure of the organizational structure and on the other hand by the assigned hierarchy levels (e.g. business unit, division, team).

- **Position**

Positions are assigned to organizational units and are used to define the jobs in your organization. A concrete user can be assigned to a position.

There are two types of positions: "Head" and "Staff Member". This information can be used in the workflow for approvals (for example, the leave request for an employee is assigned to the head of the respective organizational unit).

Organizational administrators or users who are entitled via the "Manage Organizational Structure" policy are responsible for maintaining the organizational units and positions (for example, assigning a user to a position).

#### 4.11.1 Define Hierarchy Levels

If you are in the organizational structure, you can use the "Settings" action to set the hierarchy levels. By default, the following hierarchy levels are predefined:

- Management Board (Level 01)
- Business Unit (Level 02)
- Division (Level 03)
- Team (Level 04)

You can use the "Properties" context menu command to adjust the name and level. You can obtain new hierarchy levels via the "New" background context menu command.

**Note:** Organizational units can only contain organizational units with a larger level value (for example, organizational units of level 02 can only contain organizational units from level 03).

#### 4.11.2 Create Organizational Units

If you are in the organizational structure, you can create organizational units using the "Create Organizational Unit" action. Navigate in organizational units that have already been created to create subordinate organizational units.

You can set the following values:

- *Name*  
Defines the name of the organizational unit.
- *Staff Unit*  
If an organizational unit is not part of the linear hierarchy, it can be marked as a staff unit.
- *Hierarchy Level*  
Defines the hierarchy level of the organizational unit. Only levels with a higher value than the level defined in the superordinate organizational unit are displayed.  
**Note:** You can define the available levels in the settings of the organizational structure.
- *Description*  
Defines the description of the organizational unit.
- *Import ID*  
If the organizational structure is externally managed and imported, an import identifier for the organizational unit can be defined. This allows an update of the organizational unit.

- *Members with Role "Head"*  
Defines the heads of the organizational unit.
- *Members with Role "Staff Member"*  
Defines the staff members of the organizational unit.

**Note:** You can use the "Move to Organizational Structure" context menu command to convert teams to organizational units.

### 4.11.3 Create Positions

If you are in the organizational structure, in an organizational unit, you can use the "Create Position" action to create a position for the respective organizational unit.

You can set the following values:

- *Type*  
Defines whether it is a staff member or a head position.
- *Staff Unit*  
If a position is not part of the linear hierarchy, it can be marked as a staff unit.
- *Organizational Unit*  
The position is assigned to the shown organizational unit.
- *User*  
Defines the employee who is assigned to the position.
- *Primary Position*  
If an employee is assigned to several positions, one position can be marked as primary. The primary position is used for evaluating the supervisor (e.g. in a workflow context).
- *Name*  
Defines the name of the position.

**Note:** Additional fields are available when using the Fabasoft Personnel File.

### 4.11.4 Import the Organizational Structure

If you are in the organizational structure, you can use the "Import Organizational Structure" action to import or update the organizational structure using a CSV file. The "Download CSV Template" button can be used to retrieve a template that describes the necessary data structure. The *Complete Organizational Structure Matching* option allows you to define whether existing positions and organizational units that do not exist in the CSV file should be deleted.

The CSV columns are in general free-text fields of type string. The import ID can be used to update objects. Following CSV columns are available:

CSV Column	Field	Possible Value
Key	Import ID	string
Type	-	string (OrganizationalUnit, OrganizationalPosition)



ParentKey	-	string (import ID of the superordinate organizational unit; empty on top level)
Name	Name	string
Level	Hierarchy Level	string (import ID of the hierarchy level; only organizational units)
StaffUnit	Staff Unit	string (TRUE, FALSE; only organizational units)
UnitDescription	Description	string (only organizational units)
PositionType	Type	string (HeadPos, StaffPos; only positions)
PrimaryPosition	Primary Position	string (TRUE, FALSE)
User	User	string (e-mail-address; only positions)

**Note:** If the Fabasoft Personnel File is licensed, additional metadata can be imported.

## 5 License Management

To use the Fabasoft Cloud licenses are required. The basis is an edition (e.g. Fabasoft Cloud Superior), which contains depending on the edition corresponding apps. Additionally, special apps (e.g. Scrum Projects) can be purchased and also free apps are available.

Editions and apps can be purchased in the desired number and assigned to members or external members of your organization. The assignment can be carried out automatically, manually or for special apps per configuration.

The payment user of an organization can purchase additional licenses for the organization. For this purpose the "Shop" action is provided in the organization.

### 5.1 Editions and Apps

In the organization's dashboard, click *Licenses* to open the license management. The editions and apps available in your organization are displayed as a list. The *Assignment* column displays the type of assignment:

- "Manually (Default Edition)" and "Manually (Default App)"  
Default editions or apps are automatically assigned to new members. Organizational administrators can also subsequently assign or change the editions or apps.
- Manual  
Manual assigned editions or apps must be explicitly assigned to a member by an organization administrator.

- **Configured**  
These apps offer various configuration options and roles and are therefore managed using a separate configuration. You cannot change the assignment type.
- **Free**  
Free apps provide following assignment types:
  - Free (Disabled)  
The app is not available to anyone.
  - Free (Default App)  
The app is automatically assigned to new members.
  - Free (Manually)  
The app must be explicitly assigned by an organization administrator.

Name	Purchased	Available	Assignment
<input checked="" type="checkbox"/> Fabasoft Cloud S...	50	43	Manually (Default Edition)
<input type="checkbox"/> Fabasoft Cloud S...	50	50	Manually
<input type="checkbox"/> Digital Asset Man...	50	49	Configured
<input type="checkbox"/> Contact Managemen...	50	49	Configured
<input type="checkbox"/> Scrum Projects	50	49	Configured

You can change the type of assignment using the “Use as Default”, “Do not Use as Default”, “Enable” and “Disable” context menu commands.

Navigate in the edition or app to view the list of licensed members. You can use the “Add Members” action to specify the members who are to have a license. You can use the “Remove License” context menu command to revoke the license.

## 5.2 Assign Editions and Apps

You can assign editions or apps with manual assignment to individual members.

1. In the dashboard of the organization, click *Members* to open the membership administration.
2. Navigate to the desired member.
3. In the context menu of the member, click “Assign Editions and Apps”.
  - *Edition*  
Select the edition that you want to assign to the user.
  - *Manually Assignable Apps*  
Select the apps that you want to assign to the user.
4. Click “Assign”.

**Note:** Select multiple members to make the assignment together.

## 5.3 Shop

As payment user of your organization, you can use the “Shop” action to buy additional licenses and storage volumes. Define the desired quantity of each item, select the payment method and accept the service agreement. Follow the wizard and complete the order.

**Note:** If the “Shop” action is not available in your organization, please contact [cloudsupport@fabasoft.com](mailto:cloudsupport@fabasoft.com).

## 6 Advanced Settings

To access the advanced settings, click on *Advanced Settings* in the dashboard of the organization.

### 6.1 Dashboard

Depending on your edition and licensed apps following areas are available.

#### Overview

Shows the key information of the organization. By clicking “View” you can navigate to the properties of the organization.

#### App Configurations

If apps that are based on app configurations are licensed, the corresponding app configurations are displayed here. Navigate in the app configurations widget to create additional app configurations.

#### Target Domains for “Teamroom Transfer”

Shows domains that can be used as target for transferring or publishing Teamrooms. Navigate in the target domains widget to create additional domains.

#### OAuth Clients

OAuth clients are needed, for example, for the transfer Teamroom functionality. If you activate a target domain for transferring Teamrooms, an OAuth client is created automatically in the target domain. Navigate in the OAuth client widget, to create OAuth clients manually.

For OAuth clients defined in the organization, you can specify whether the use must be confirmed.

#### Mindbreeze InSpire Services

Mindbreeze InSpire Services can be used to classify documents automatically. Navigate in the *Mindbreeze InSpire Services* to create additional services. If only one service is available, it is automatically the default service. If multiple services are available, a service can be set as default service by using the “Set as Default” context menu command. The default service is used if no service has been explicitly defined in the respective context.

You can define the following settings:

- *Name*  
The name of the service.

- **Filter Service URL**  
The URL to the Mindbreeze InSpire filter service (e.g. `https://mbinspire.example.com:8443/filter/23401`).
- **Authentication**  
Defines the authentication type for the filter service.
- **Root and Intermediate Certificate Authorities**  
Defines the root and intermediate certificate authorities for the validation of the SSL server certificates of the filter service.
- **Tenant**  
The Mindbreeze InSpire prediction service is multi-tenant capable. If a tenant is defined, it will be used in Mindbreeze InSpire.  
**Note:** In the Mindbreeze Management Center, the *Tenant ID Pattern* property must have the following value: `{{_FSCMINDBREEZE_1_1001_fscmbtenant}}`
- **Project**  
Within a tenant several projects can be managed. If a project is defined, it will be used in Mindbreeze InSpire.  
**Note:** In the Mindbreeze Management Center, the *Project ID Pattern* property must have the following value: `{{_FSCMINDBREEZE_1_1001_fscmbproject}}`
- **Scope**  
Within a project several scopes can be managed. If a scope is defined, the corresponding model will be used in Mindbreeze InSpire. Otherwise, the default model is used.  
**Note:** In the Mindbreeze Management Center, the *Scope ID Pattern* property must have the following value: `{{_FSCMINDBREEZE_1_1001_fscmbscope}}`
- **Send Feedback to Mindbreeze InSpire Service**  
Defines whether feedback about the correctness of the classification will be sent to the Mindbreeze InSpire service. This can improve the future classification.
- **Key Mapping**  
If the keys defined in Mindbreeze InSpire do not correspond to the keys in the Fabasoft Cloud, a mapping can be defined. As key in the Fabasoft Cloud the reference of the respective property is used (e.g. `COOTC_1_1001_objcategory` for the *Category* property). In the case of user-defined forms the programming name of the property is used as key.

If necessary, contact Mindbreeze InSpire Support to make the specific settings.

## Failed Background Tasks

Background tasks are used to execute actions at a specific point in time. If a background task could not be executed successfully (for example, if the object concerned is locked), the system tries to execute the background task again later. After ten unsuccessful attempts, the background task is suspended and no longer executed automatically. Organization administrators are also informed of suspended background tasks by e-mail.

You can perform the following manual actions for background tasks:

- **Define Next Execution** (only visible if you have full control on the object)  
Defines a time at which the background task is executed again.
- **Send Link**  
The background task can be forwarded to a user with appropriate access rights.
- **Delete** (only visible if you have full control on the object)  
Deletes the background task on the affected object. The task is no longer executed.

**Note:** The “Failed Background Tasks” widget is only visible, if at least one failed background task is available.

## 6.2 Define Contact Data

You can enter addresses, telephone numbers and e-mail addresses of your organization. To add the e-mail domain for your organization, please contact Fabasoft Cloud Support because the domain has to be verified. For example, users with an e-mail address that corresponds to one of your e-mail domains are recognized as members. The company name and the UID number can only be changed as long as the organization has not been checked and classified as trustable by Fabasoft. Please contact Fabasoft Cloud Support if changes are necessary.

To define the contact data, perform the following steps:

1. In the dashboard of the organization click *Advanced Settings*.
2. Click the “Define Contact Data” action.
3. Enter the desired data.
4. Click “Save”.

## 6.3 Define Logo

To define the logos, perform the following steps:

1. In the dashboard of the organization click *Advanced Settings*.
2. Click the “Define Logo” action.
3. Upload the logos or select already existing logos. If a logo exceeds the maximum display size, it will be automatically displayed smaller.
4. Upload a background image for the home area.
5. If applicable, specify the background color for the header (as hexadecimal value, e.g.: #FF0000). The colors of the elements of the header are automatically adapted to the background color.  
**Note:** If you select a background color, the background color and the logo are also considered for the login pages.
6. If you select the *Use Logo and Background Color in E-Mails* setting, the logo and the background color are also included in your organization's e-mails sent via the Cloud.
7. Click “Save”.

## 6.4 Define Policies

You can centrally define policies and default settings for the members of your organization. This is an efficient way to ensure a consistent user experience.

To define the policies, perform the following steps:

1. In the dashboard of the organization, click *Advanced Settings*.
2. Click the “Define Policies” action.
3. Switch to the desired tab and define the policies. Further information can be found in the next chapters.
4. Click “Save”.

### 6.4.1 “Actions” tab

Define which organization members are authorized to execute the following actions:

- *Allow “Create Teamrooms” for Each Location Separately*  
Defines whether the *Create Teamroom* policy can be defined for all locations together or for each location separately.
- *Create Teamrooms* (all locations or per location)  
Defines the members who are allowed to create Teamrooms.
- *Manage Home*  
Defines the members who are allowed to manage their “Home”. Members who are allowed to manage the home area can show or hide widgets and place or remove objects on their home. Regardless of the policy, members can always move widgets and resize them.
- *Transfer Teamrooms* (Enterprise and higher)  
Defines the members who are allowed to transfer or publish Teamrooms.
- *Edit Forms and Categories*  
Defines the members who are allowed to create, edit and release forms and categories.
- *Edit BPMN Process Diagrams*  
Defines the members who are allowed to create, edit and release BPMN process diagrams.
- *Manage Inbox Rules*  
Defines the members who are allowed to create and edit rules for inboxes.
- *Use Search Folders for Audit Logs* (Enterprise and higher)  
Defines the members who are allowed to see audit logs.
- *Digitally Sign Documents*  
Defines who is allowed to digitally sign documents.  
**Note:** The digital signature has to be configured for the organization.
- *Synchronization Mode*  
Defines how the Cloud folder can be used by members to synchronize with the file system (“No Synchronization”, “Synchronized Folder”, “Synchronized Desktop or Synchronized Folder”).  
No synchronization: You can prevent the members can synchronize their data with the file system.  
Synchronized desktop: The members can synchronize their whole “Home”.  
Synchronized folder: The data in the synchronized folder of the members is synchronized.

**Note:**

- These actions are generally not available for external members.
- In the properties of the organization member, you will find the restrictions that apply to this member on the “Policies” tab. If “Executable by all members except” or “Executable by no one except” are defined in the organization, you can also change the settings for the user on this tab. If a policy is defined via a team, the settings cannot be changed at the user.

### 6.4.2 “Membership Administration” tab

Define settings regarding the membership administration.

- *Add Members to the Organization*  
Defines the members who are allowed to add new members to the organization. Only members whose email address matches one of the organization's email domains can be added.

- *Add External Members to the Organization*  
Defines the members who are allowed to add new external members to the organization.
- *Remove Members from the Organization*  
Defines the members who are allowed to terminate memberships of members.
- *Remove External Members from the Organization*  
Defines the members who are allowed to terminate memberships of external members.
- *Manage Organizational Structure*  
Defines the members who are allowed to manage the organizational structure.
- *Manage External Organizations*  
Defines the members who are allowed to manage external organizations.
- *Manage Teams*  
Defines the members who are allowed to manage teams.

### 6.4.3 “Content” tab

Define settings regarding the allowed contents.

- *Blocked File Extensions*  
Define a not allowed file extension per line. File with these file extensions cannot be uploaded.
- *Check Blocked File Extensions in ZIP Archives*  
Defines whether file extensions are also checked in ZIP archives.
- *Maximum File Size (in MB)*  
Files can only be uploaded if the file size does not exceed the specified value.
- *Maximum Number of Versions Kept*  
When objects are changed a version is created. Here you can define how many versions are kept at maximum.
- *Signatures With Additional Password Verification (Compliant to FDA 21 CFR Part 11)*  
Allows an additional password prompt when applying a signature that is defined in this policy.
- *Edit Office Documents in Microsoft Office Online*  
Define users who are allowed to open documents that are assigned to your organization with Microsoft Office Online.  
Keep in mind that Office Online is a Microsoft service and use of Office Online is subject to Microsoft’s terms of use and privacy policy. When displaying or editing files, Office Online keeps a temporary copy of this file on Office Online servers.  
If you want to prevent that documents are transferred to an Office Online server, select “No one”.
- *Open or Download Content on the Workstation*  
Can be used to determine for whom the open and download actions are available in the web browser client. In addition, Teamrooms and the assigned objects cannot be duplicated.  
For example, you can specify that nobody other than your organization members can use these actions.
- *Block Downloading of Content via Public Links*  
If enabled, the “Download” button is not displayed for public links throughout the organization. Otherwise, it can be defined for the Teamroom or public link whether the “Download” button is displayed.

- *Allowed Members in Teamrooms*  
By default, users, teams and organizations can be authorized in Teamrooms. You can restrict the allowed members teams and organizations.

#### 6.4.4 "Processes" tab

Define settings regarding processes.

- *Process Administrators*  
Process administrators get an overview of all predefined and ad hoc processes of the organization and can also manage them (if process statistics are enabled for process administrators).
- *Show Process Statistics for*  
Defines who is allowed to see process statistics.
- *Process Statistics Calculation Interval*  
Defines the interval for calculating the process statistics.
- *Schedule Process Statistics Calculation*  
Defines when the next calculation of process statistics will take place.

#### 6.4.5 "Authentication" tab

Define settings regarding the authentication.

- *Authentication Methods That Do Not Require Two-Factor Authentication*  
You can define that single sign-on and certificate authentication methods do not require a second factor. If you disable the second factor, your IT department must take appropriate measures to ensure that the authentication level is still maintained.

#### 6.4.6 Default Settings

On the "Basic Settings", "Accessibility", "Notifications", "Workflow" and "Home" tabs, you can define default settings for your members. Additionally you can define whether the settings are changeable by the members. Via the "Apply Default Settings" button, you can restore the settings predefined by Fabasoft. You can also define the settings individually in the properties of the members.

##### **Note:**

- If the organization from which a user is managed changes, the default settings of the new organization are applied to the user.
- Changes to the default settings only affect new and not existing members.  
The "Apply Organizational Settings" context menu command is available for users, teams, organizational units, external organizations and organizations in order to take over changed default settings.

### 6.5 Define Certificate Settings

In order that members of your organization can log in via a client certificate, all certificate authorities that are allowed to issue client certificates for your organization, have to be stored in the corresponding field as CER files in PEM format.

Additionally, you have to store the superordinate root and intermediate certificate authorities for the issuing certificate authorities in the corresponding field as CER files in PEM format. Provide for



each root, intermediate and issuing certificate authority the corresponding certificate revocation list URLs. You can define whether a two-factor authentication is necessary when using the certificate log-in.

The CN of the certificates and the DN of the issuer must not contain special characters.

To complete the certificate configuration for your organization, you have to add the common name of the corresponding client certificates to the members (see chapter 4.8 “Define Authentication and Two-Factor Authentication”).

**Note:** You can also define certificate settings for external organizations. This way you can provide a client certificate log-in for your external members, too.

## 6.6 Define RADIUS Settings

In order that your organization members can use a one-time password via a RADIUS server, the settings of the RADIUS server must be defined in your organization. In addition, you have to define the respective *User ID Used for RADIUS Server* for your organization members.

### Organization settings

Enter the computer name and the shared secret of the RADIUS server. The connection can be established either via UDP (port 1812) or RadSec (port 2083).

### RADIUS server settings

- You have to configure the following IP addresses in your RADIUS server:
  - 194.247.47.120
  - 213.95.138.12
  - 46.140.135.213
- Your RADIUS server has to be accessible via one of the following ports.
  - TCP/2083 (RadSec)
  - UDP/1812

## 6.7 Define Organization Roles

Via organization roles you can define users who are responsible for managing the organization. For further information about the roles, see chapter 3 “Organization Roles”.

## 6.8 Configure Encryption

In order to be able to encrypt Teamrooms using Fabasoft Secomo, the encryption functionality must be configured.

- *Key Server*  
Define a key server that should be used for encryption. Keys created as part of the encryption process will be managed by that key server.
- *Use Client Certificates for Authentication*  
Define if client certificate authentication should be used for key server access. If client certificate authentication is configured for users of your organization, that authentication mechanism can be enabled for key server access.

As part of the initial configuration, keys are generated by the key server for your organization. After completion, the encryption functionality will be enabled.

## 6.9 Configure Digital Signature

To enable the digital signing of documents with a certificate, you must store the corresponding certificate in your organization. In addition, you can specify which organization members are allowed to sign digitally.

**Note:** Fabasoft Secomo is required for the digital signature.

## 7 Standard Teamrooms

As organization administrator, you can add standard Teamrooms to your organization or teams in the organization folder. The standard Teamrooms are displayed in the organization folders of the members who are authorized in the Teamrooms.

To create a standard Teamroom, navigate in the dashboard of the organization in the *Organization Folder* area. Via the "Create Teamroom" action, you can create a new Teamroom and if desired grant access rights in one step.

**Note:**

- In addition to Teamrooms also inboxes and rooms with user data can be defined as standard Teamroom (e.g. background context menu "New" > *Inbox*).
- The organization folder of teams can be found in their properties.

## 8 Additional Management Options

The following additional management options are available.

### 8.1 Anonymize Users

Due to legal regulations, it may be necessary to anonymize users. Anonymization means that the user is replaced in the organizational context in all shortcuts by a special user provided for anonymization. An example of such a shortcut is the user stored in the *Created by* field of any object.

Anonymization also includes saved versions and audit log entries. Closed documents and documents with a retention period are, however, excluded from anonymization.

#### Terminating a Membership

When you terminate the membership of a user you are managing, you can choose whether to deactivate the user. Upon deactivation, all personal data except first name, surname and e-mail address will be irrevocably deleted.

#### Anonymization by a Compliance Manager

The compliance managers are defined via the organizational roles. When a user's membership is terminated, compliance managers are notified by e-mail. The compliance managers can immediately anonymize the user or define a reminder for a specific point in time. Since anonymization takes some time, the compliance managers are informed of the outcome by e-mail.

Users who are no longer members of the organization can be anonymized at any time using the context menu command “Anonymize User”. The context menu command can also be executed on the organization, in particular to anonymize users who, for example, worked in Teamrooms in the context of the organization but were never members.

### Deletion Request by a User

If Fabasoft receives a deletion request from a user, the compliance managers of the organizations concerned are informed about the deletion request and asked to anonymize the user.

### Deleting the User

Once a user has been completely anonymized in all affected organizations, it is automatically deleted.

## 8.2 Dissolve All Teamrooms

### Caution

Before executing this use case make sure that you no longer need your data. This step cannot be undone.

As owner or co-owner, you have the option to dissolve all Teamrooms (including app rooms and app configurations) of your organization and irrevocably delete the contained data. In addition, all objects of the organization with the security context “ACL for Objects Without a Teamroom” are deleted.

To perform this use case, you can utilize the “Advanced” > “Dissolve All Teamrooms” context menu command on your organization.

## 8.3 Deactivate and Reset Organization

### Caution

Before executing this use case make sure that you no longer need your data. This step cannot be undone.

As owner or co-owner, you have the option to deactivate and reset your organization. Thereby all memberships are terminated, all teams, organizational units and external organizations are deleted and all settings are reset. Users who are not members or external members of any other organization are deactivated (this also applies to the owner).

To perform this use case, you can utilize the “Advanced” > “Deactivate and Reset Organization” context menu command on your organization.

**Note:** To delete all your data, first dissolve all Teamrooms in all locations.

## 8.4 Show New Events

To ensure traceability in organizational management, the corresponding changes are logged (for example, member added or organizational role assigned). To view the events, navigate to your organization and click the “Show New Events” action.

Via the time travel you can access the versions, which were created due to the changes.

## 8.5 Show Teamroom Usage

You can get a detailed overview of the users in your organization Teamrooms. The evaluation can be restricted to members of a team, external organization or to a single (external) member.

1. Navigate to the desired organization, organizational unit, team or (external) member.
2. Run the "Show Teamroom Usage" context menu command.

This list displays you all users that have access rights on organization Teamrooms. Via the "More Details" button you will get more information to the user like editions and apps of this user. As owner or co-owner you will also see the Teamrooms of the organization in which the user has access rights. You can download the data as CSV file.

## 8.6 Define Data Protection Settings

To define data protection settings for your organization, perform the following steps:

1. Navigate to your organization.
2. In the context menu of the organization, click "Properties".
3. Switch to the "Data Protection" tab.
4. Enter your data.
  - *First Name and Surname*  
Defines the name of the person to be notified if personal data protection is violated.
  - *Notification Address*  
Specifies the postal address or e-mail address for the notification.
  - *URL for Data Protection Information*  
The specified link to your data protection information is displayed in the registration form.
5. Click "Next".

## 8.7 Define Trusted Networks

Trusted networks are used, for example, in the validation of cookie-based user sessions. During the authentication process, a cookie is issued to identify the user session. This cookie is linked to the user's current workstation for security reasons. The workstation is identified by the IPv4 address of the network connection. The user session becomes invalid when the IPv4 address changes. In rare cases it may happen that the IPv4 address changes even though the workstation remains the same (e.g. if several proxies are involved or the IPv4 address of the workstation is reassigned). In this case, the user session also becomes invalid and the user must log on again.

However, by defining secure address ranges, a user session remains valid even if the IPv4 address has changed, provided that the new IPv4 address is within the configured range.

To define trusted networks, perform the following steps:

1. Navigate to your organization.
2. In the context menu of the organization, click "Properties".
3. Switch to the "Data Protection" tab.
4. Enter your IPv4 addresses or address ranges.

5. Click "Next".

## 8.8 Define a Branding for the Organization

The branding allows you to create personalized Teamrooms. If a branding is defined for an organization, Teamrooms are initialized with this branding. The branding is available if the "Branding" tool is activated.

To create a branding for your organization, perform the following steps:

1. Navigate in your organization.
2. Open the "Branding" tool.
3. Activate the branding if necessary.
4. Click "Edit" below the text.
5. Define a logo, a title and a short description.  
**Note:** You can format the description via the displayed HTML editor.
6. Click "Save"

**Note:** Users with full control in a Teamroom can use the "Branding" tool to define a logo, a title and a short formatted description for the respective Teamroom.

## 8.9 E-Mail Communication

For an overview of all e-mails sent in the course of organizational use cases (invitations, exclusion, etc.), the corresponding e-mails are displayed in the properties of the organization on the "E-Mail Communication" tab.

## 8.10 Define the Main Location

In order that all your organization members work by default in the same main location, you can define this setting in the properties of your organization on the "Organization" tab in the *Default Main Location for New Members* field. To assign a different main location to individual members, you can set the main location in the properties of the corresponding user on the "Administration" tab in the *Main Location* field. It is no longer possible that members define the main location by themselves.

## 8.11 Manage Organizations