



TrustSphere

Because Relationships Matter

Client Services Administration



Client Services Administration

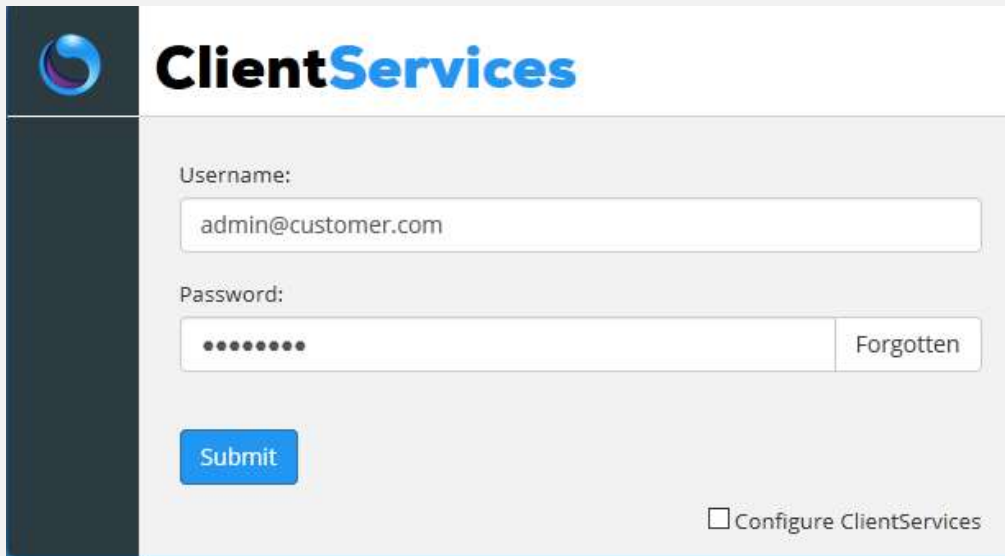
Client Services Administration provides a single point to administer access to TrustSphere products. User access, permissions, preferences and reporting settings are gathered into one place for ease of use.

Features:

- User/Key administration
- Group administration
- Application subscription management
- Tag metadata management
- Scheduled reporting management
- Application preference management

Client Services – Admin Login

The application is opened in a web browser using the following URL: `https://<service>/csadmin`



The screenshot shows the ClientServices Admin Login interface. On the left is a dark blue sidebar with the ClientServices logo. The main content area has a light gray background. At the top, the 'ClientServices' logo is displayed. Below it, there are two input fields: 'Username:' with the value 'admin@customer.com' and 'Password:' with masked characters. A 'Forgotten' link is next to the password field. A blue 'Submit' button is below the password field. At the bottom right, there is a checkbox labeled 'Configure ClientServices'.

Once the service is configured you will receive an username and password enabling access to the application

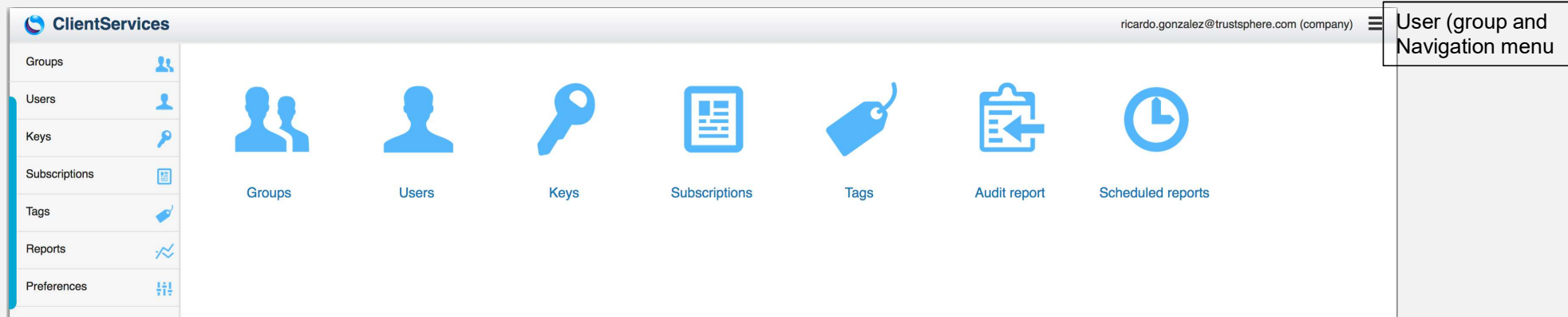
These credentials will allow administration of your group.

It will then be necessary to login and create other users in the group as required.

NOTE: An important first task is to define the SMTP settings, such that forgotten password emails can be sent to users.

Client Services – Administration Panel

The home page provides access to the different functions:



The sidebar menu and dashboard contain items and categories that may be expanded by clicking on them.

The navigation menu allows switching between groups (most customers will only have access to a single group), showing help and returning to the home page.

The current user name, and group (if multiple groups are allowed) is shown next to the navigation menu.

Groups

The Group page provides status information and group setting management

- Number of ClientServices application licenses available for assignment to users
 - The number of ClientServices application licenses allocated to users
 - The licenses status (valid | invalid)
 - The URL of the TrustVault service that provides information to applications
 - A test button to verify the connection to the TrustVault service
- Click on the group name to open the setting management tabs

ClientServices

ricardo.gonzalez@company.com (company)

Groups

Users

Keys

Subscriptions

Tags

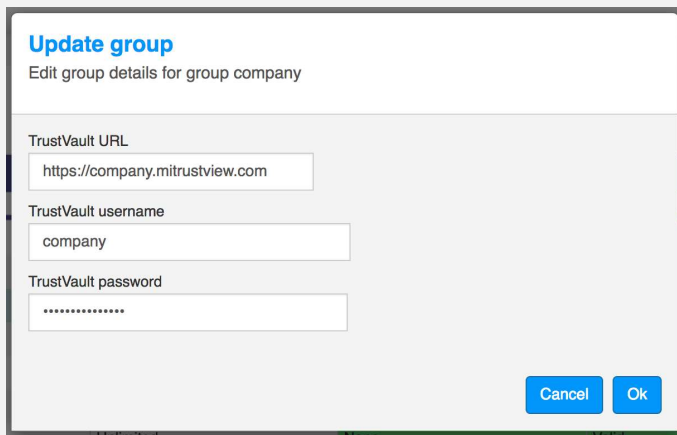
Groups

Name	Licences	Allocated	Licence	Server	Server Test
company	Unlimited	9	Valid	https://company.mitrustview.com	<button>Test</button>

Total Items: 1

Groups

- The [Configure] or [Update] button allows update of the TrustVault service settings
 - The settings may have been previously set by TrustSphere



Update group
Edit group details for group company

TrustVault URL

TrustVault username

TrustVault password

If accessing an on-premise service, the TrustVault administrator should provide credentials for an MI API user

- Enter the service URL and MI API User credentials
- User the [Test] button to verify connection to the TrustVault service

Groups

Clicking on the group name enables configuration of various settings.

Branding ⓘ General ⓘ Actions ⓘ SMTP settings ⓘ

Reporting	SmtP	Server	Port	From	Security	Security Username
Enable	Update Test	smtp.office365.com	587	tv.reports@trustsphere.com	true	postman@trustsphere.com

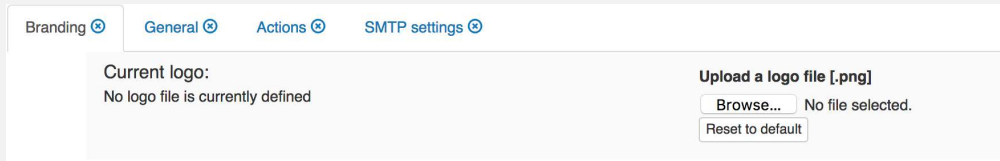
Total Items: 1

An SMTP server must be configured for sending password reset notifications and scheduled reports.

- It is recommended that TLS security is used
- Use the [Test] button to validate the email settings
- NOTE: Some email systems will reject the email request, if the From address is not valid within the email system

Groups

Clicking on the group name enables configuration of various settings.

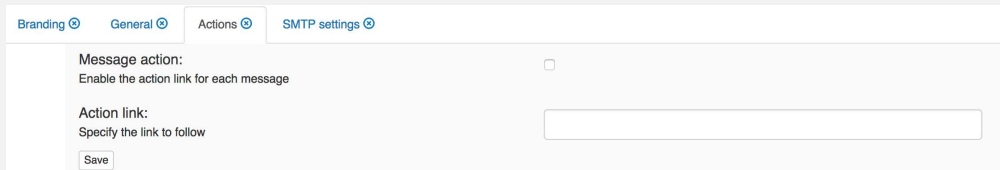


Branding ⓘ General ⓘ Actions ⓘ SMTP settings ⓘ

Current logo:
No logo file is currently defined

Upload a logo file [.png]
Browse... No file selected.
Reset to default

- The application logo can be replaced on (some) applications.
Upload a 32x32 pixel PNG image to replace the logo



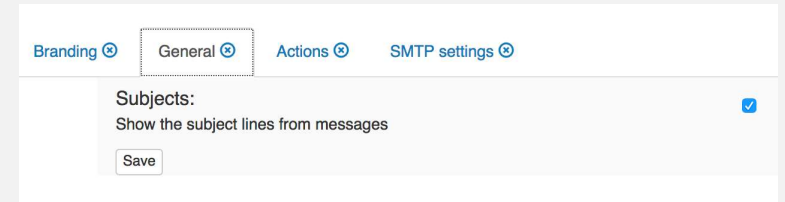
Branding ⓘ General ⓘ Actions ⓘ SMTP settings ⓘ

Message action:
Enable the action link for each message ☐

Action link:
Specify the link to follow

Save

- Reports that include message subjects can be configured to enable a click-through to a defined URL.
- This is useful to integrate email archiving systems with the application
- See later section for further details



Branding ⓘ General ⓘ Actions ⓘ SMTP settings ⓘ

Subjects:
Show the subject lines from messages ☒

Save

- General settings are common to all applications.
These settings cannot be overridden by the application or the application user.
- For example, enable/disable visibility of subject lines.

Users

The Users page allows management of users

- [Add] [Remove] or [Update] user accounts
- [Update] permissions to access applications or restrict information

Users for company

Add user

Action	Permissions	Username	Type	Active	Other Groups	Provision	Provision Key
Remove Update	Update	<input type="text" value="admin@company.com"/>	<input type="text" value="Group admin"/>	<input type="text" value="Active"/>	<input type="text"/>	<input type="text" value="Inactive"/>	<input type="text"/>
Remove Update	Update	carol.dutt@company.com	Standard	Active		Inactive	Key used
Remove Update	Update	chris.hain@company.com	Standard	Active		Active	1011VQIW
Remove Update	Update	dan.kean@company.com	Standard	Active		Active	1011ULFE
Remove Update	Update	danny.martin@company.com	Standard	Active		Inactive	Key used
Remove Update	Update	demo@trustsphere.com	Restricted	Active		Inactive	
Remove Update	Update	don.martin@company.com	Standard	Active		Active	1011BNYM
Remove Update	Update	harijono.suwarno@multiinte...	Standard	Active		Active	1011LSWZ
Remove Update	Update	larry.thomas@company.com	Standard	Active		Active	1011PTCI
Remove Update	Update	mark.magee@company.com	Standard	Active		Inactive	Key used
Remove Update	Update	mkieffer@intradyn.com	Standard	Active		Inactive	
Remove Update	Update	rosalee.hyvl@company.com	Standard	Active		Inactive	
Remove Update	Update	scott.whitt@company.com	Standard	Active		Inactive	Key used
Remove Update	Update	yandra@trustsphere.com	Standard	Active		Inactive	

Total Items: 14

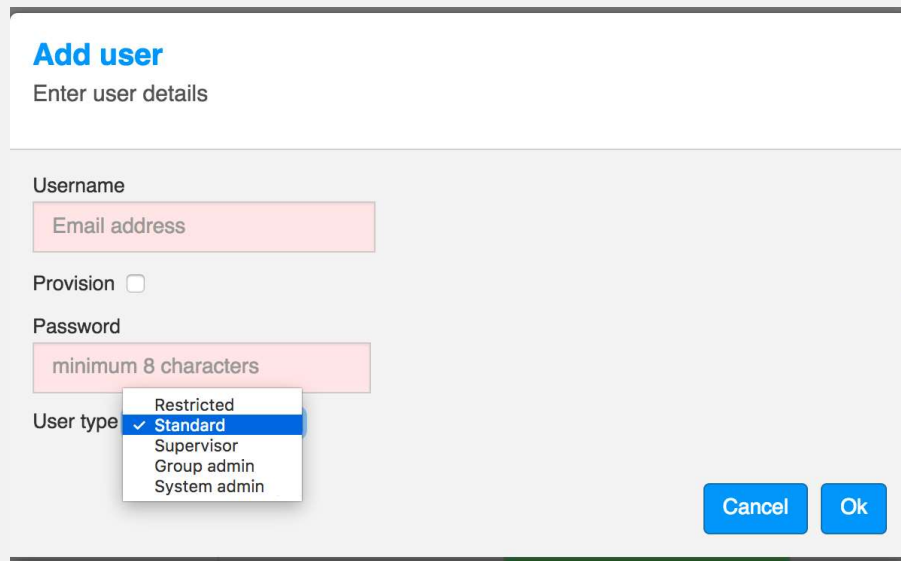
Users:

- Username (email address)
- Type (determines accessible features)
- Active (Allow access to applications)
- Other groups (Allow access to multiple TrustVault information)
- Provision (provide a temporary password for access to Mobile application)
- Provision key(temporary password)

NOTE: Provisioning should only be used for Mobile application users

[Add] [Remove] or [Update] Users

Users may be added, a user may be granted access to multiple applications using a single set of credentials



Add user
Enter user details

Username
Email address

Provision ☐

Password
minimum 8 characters

User type
Restricted
✓ Standard
Supervisor
Group admin
System admin

Cancel Ok

- Usernames must be the users email address
- Users should be given an initial password.
Note: provisioning should only be selected if the mobile application is required to be used.
- User type determines access features:
 - Standard; a normal user
 - Restricted; various restrictions can be set, in regard of data visible to them from the TrustVault service
 - Supervisor; can access the audit and tag management functions
 - Group admin; can also manage users and groups
 - System admin; has full access to the system

Each customer is allocated a single group admin account.

This account should then be used to create further user accounts as required.

[Update] User Permissions

Access restrictions to TrustVault information and applications can be defined for each user

Edit user permissions
Edit permissions for user carol.dutt@company.com

Results to include only these local addresses

Results to include only these remote addresses

Results to exclude these local addresses

Results to exclude these remote addresses

Applications assigned

☒ TrustView
☐ Salesforce
☐ sdk
☐ TeamInsights
☐ SugarCRM
☐ TrustVault
☐ Log connector
☐ Widget
☐ Mobile
☐ Administration

Applications in trial mode
None available

Widgets assigned

- The result inclusion/exclusion settings determine the information visible to the user. Each item can be a local email address(es), remote email address(es) and domain(s). For example:
 - Add the CEO's email address to exclude the CEO's information from any results shown in applications
 - Add the users email address to include only information for that particular individual
- Assign the applications the user can access. Note that only those applications that have free subscriptions will show in this section.
- Enter the name of the widgets the user can access, leave blank to grant access to all widgets

Keys

An access key is analogous to username/password credentials but are used to allow group wide access using a single key – typically used when integrating widgets into 3rd party applications, and in Salesforce and Sugar integrations.

Keys for company

Add key

Action	Permissions	Key	Type	Active	Other Groups	Security
<div>Remove</div> <div>Update</div>	<div>Update</div>	0ea79ty6ghzfnjqh4	Standard	Active		
<div>Remove</div> <div>Update</div>	<div>Update</div>	2s6g1qd2zh8ota2p	Standard	Active		
<div>Remove</div> <div>Update</div>	<div>Update</div>	5oq9q9hxyajku4za	Standard	Active		
<div>Remove</div> <div>Update</div>	<div>Update</div>	8qefuf53rj7om45y	Standard	Active		
<div>Remove</div> <div>Update</div>	<div>Update</div>	i8ingv79f0x2147y	Standard	Active		
<div>Remove</div> <div>Update</div>	<div>Update this keys permissions</div>	ztplded3p8zsoir3	Standard	Active		

Total Items: 6

Edit key

Edit details for key ztplded3p8zsoir3

Key type

Restricted

Standard

Supervisor

Group admin

System admin

Security

Information

TrustSphere demonstration for Se

Other groups

Select all

Clear all

☐ trustsphere

☐ greenwell

☐ riva

☐ clinton

☐ enron

☐ sss_222

☐ sss_394

Cancel

Ok

- Keys may not be provisioned
- Access permissions are as defined for standard users
- Keys may not be reset, once a key is compromised it should be de-activated or deleted

Subscriptions

- The subscriptions page shows the status of application allocations.
- The subscriptions are provided by TrustSphere who can configure updated levels on request
- The subscription table shows the available applications, how many users can be allocated and the start and end date
- Subscriptions are allocated to users by setting the user permission for an application. Allocated subscriptions can be moved between users by deleting a user, or taking away permission for an application and applying to another user.
- Once allocated, a subscription can only be used by that user or key.
- When all subscriptions are allocated, a user or key will not be given permission to use the application

Group	Application	Subscriptions	Allocated	Active	Type	Start	End
company	csadmin	Unlimited	9	Yes		29-November-2016	31-December-2019
company	widget	15	9	Yes		29-November-2016	31-December-2019
company	trustvault	1	2	Yes		29-November-2016	31-December-2019
company	widgets	None	1	No		29-November-2016	31-December-2019
company	mobile	50	48	Yes		29-November-2016	31-December-2019
company	sugar	Unlimited	4	Yes		29-November-2016	31-December-2019
company	sdk	Unlimited	8	Yes	poc	31-May-2017	31-December-2019
company	llc	1	1	Yes		29-November-2016	31-December-2019
Total Items: 11							

Tags

- **Tags** are user defined labels that can be used to set a reduced scope for application results.
- Tags allow multiple items to be associated with a label.
This provides a means to define the organisational structure. For example a **sales** tag can be added to every email address belonging to a person in the sales team. Or to define an ad-hoc structure **coffee club**
- Tags:
 - Are user configurable text labels, with no predefined hierarchy
 - Can be used to set the scope for information
 - Can refer to single or multiple items, such as email addresses or existing tags
 - Are hierarchical, tags at higher levels are selected before lower level tags
 - Can be exported and/or imported in CSV format
- This allows people (internal or external) to be tagged by department, team or other groupings. Applications can then be instructed to provide information only for the people identified with a particular tag.

Demonstrating Tags – Grouping Data

- Tag: “person”

Action	Name	Type	Location	Tagged	Isid	Changed
	<input type="text"/>	<input type="text" value="pers"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Remove Update	Alan Goodell	person	internal	allan.goodell@company.com	Yes	07-July-2017
Remove Update	Carol Dutt	person	internal	carol.dutt@company.com	Yes	07-July-2017
Remove Update	Chris Hain	person	internal	chris.hain@company.com	Yes	07-July-2017
Remove Update	Dan Kean	person	internal	dan.kean@company.com	Yes	07-July-2017
Remove Update	Dan Magee	person	internal	dan.magee@company.com	Yes	07-July-2017
Remove Update	Dana Puthigai	person	internal	dana.puthigai@company.com		
Remove Update	Danny Martin	person	internal	danny.martin@company.com		
Remove Update	Danny Wolfe	person	internal	danny.wolfe@company.com		
Remove Update	Debra Pereira	person	internal	debra.pereira@company.com		
Remove Update	Debra Storey	person	internal	debra.storey@company.com		
Remove Update	Don Martin	person	internal	don.martin@company.com		
Remove Update	Elizabeth Rodrigue	person	internal	elizabeth.rodrigue@company.com		
Remove Update	Fiona Kaminski	person	internal	fiona.kaminski@company.com		
Remove Update	Frank Rasmussen	person	internal	frank.rasmussen@company.com		
Remove Update	Geoff Shackleton	person	internal	geoff.shackleton@company.com		
Remove Update	Harry Boyd	person	internal	harry.boyd@company.com		
Remove Update	Jason Causey	person	internal	jason.causey@company.com		
Remove Update	Jason Shapiro	person	internal	jason.shapiro@company.com		

Total Items: 84 (Showing Items: 42)

- Tag: “department”

Tags for company

[Add tag](#) [Remove all](#) [Import](#) [Export](#)

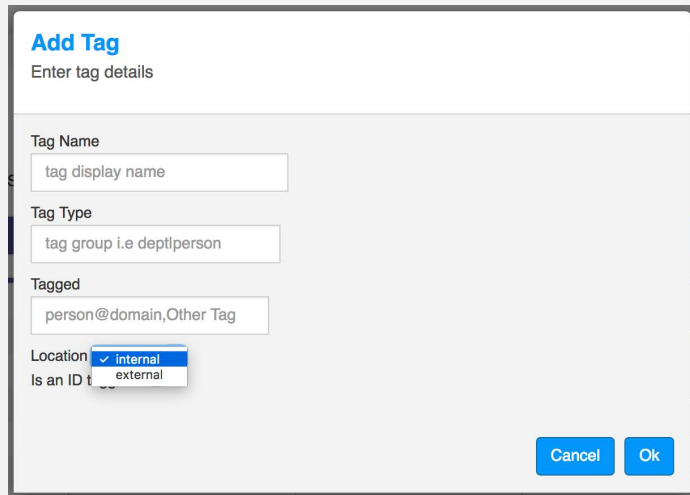
Action	Name	Type	Location	Tagged	Isid	Changed
	<input type="text"/>	<input type="text" value="department"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Yes"/>	<input type="text"/>
Remove Update	Marketing	department	internal	don.martin@company.com	Yes	07-July-2017
Remove Update	Marketing	department	internal	debra.pereira@company.com	Yes	07-July-2017
Remove Update	Marketing	department	internal	dan.magee@company.com	Yes	07-July-2017
Remove Update	Marketing	department	internal	harry.boyd@company.com	Yes	07-July-2017
Remove Update	Marketing	department	internal	jim.peters@company.com	Yes	07-July-2017
Remove Update	Marketing	department	internal	mick.brown@company.com	Yes	07-July-2017
Remove Update	Marketing	department	internal	monika.merris@company.com	Yes	07-July-2017
Remove Update	Marketing	department	internal	sheila.johnson@company.com	Yes	07-July-2017
Remove Update	Marketing	department	internal	tony.magee@company.com	Yes	07-July-2017
Remove Update	Sales	department	internal	dan.kean@company.com	Yes	07-July-2017
Remove Update	Sales	department	internal	scott.whitt@company.com	Yes	07-July-2017
Remove Update	Sales	department	internal	allan.goodell@company.com	Yes	07-July-2017
Remove Update	Sales	department	internal	debra.storey@company.com	Yes	07-July-2017
Remove Update	Sales	department	internal	elizabeth.rodrigue@company.com	Yes	07-July-2017
Remove Update	Sales	department	internal	geoff.shackleton@company.com	Yes	07-July-2017
Remove Update	Sales	department	internal	joe.magee@company.com	Yes	07-July-2017
Remove Update	Sales	department	internal	john.davis@company.com	Yes	07-July-2017
Remove Update	Sales	department	internal	mel.kaminski@company.com	Yes	07-July-2017

Total Items: 84 (Showing Items: 42)

Adding and Editing Tags

Creating a Tag

- A tag is a text label used to group information
- Tags can be used in the place of identifiers (email addresses, etc.)



Add Tag
Enter tag details

Tag Name
tag display name

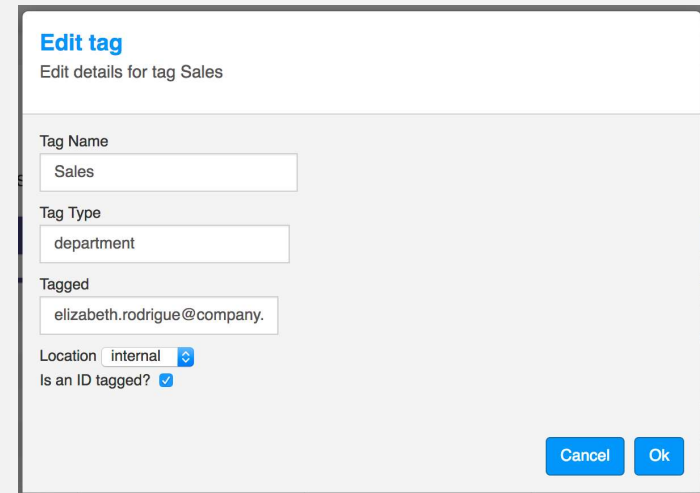
Tag Type
tag group i.e dept|person

Tagged
person@domain, Other Tag

Location ☒ internal ☐ external
Is an ID t

Cancel Ok

Editing a Tag



Edit tag
Edit details for tag Sales

Tag Name
Sales

Tag Type
department

Tagged
elizabeth.rodrique@company.

Location ☐ internal ☒ external
Is an ID tagged? ☒

Cancel Ok

Tag file format (for importing)

- The tag file is formatted as comma separated values.
- The first line is a column header, subsequent lines are tag labels
- Export tags to receive a properly formatted file

Reports

User reports

- Scheduled reporting uses the SMTP email service to deliver reports on a periodic basis to users via email
- Applications allow users to generate reports periodically and receive the results via email.
The administrator has management features available to modify or delete any scheduled reports.

Group reports

- The “Relationship summary report” provides each user a summary review of the past weeks' communication activity.
Select which users should receive the report, with options to copy to other email address(es).

Scheduled reports for trustsphere

Action	Group	Requested By	Created	Report	Last Run	Result	Next Run	Frequency
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Total Items: 0

Group reports

The following reports can be enabled and configured for the group as a whole

Relationship summary report

Contact Details



USA – New York

1330 Avenue of the Americas
23rd Floor
New York, NY 10019
Tel: +1 212 653 0652
Fax: + 1 212 653 0650

Singapore

3 Phillip Street
#13-03 Commerce Point
Singapore 048693
Tel: +65 6536 5203
Fax: +65 6536 5463

United Kingdom

Vicarage House
58-60 Kensington
Church Street
London, W84DB
Tel: +44 207 368 3444
Fax: +44 207 692 4759

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