

## How to Configure Data Security

The Data Security tools enable Administrators to restrict access to records in their account to specific Users or User Groups. This can be configured to happen automatically when records are created, or to happen only when users explicitly choose to restrict a record.

### How to Enable Data Security

By default, the Data Security tools will be disabled in an account. The tools can be enabled with this process:

- Hover over **My Account** and select **Administration**
- Select **Data Security** from the Access & Security section on the left-hand side
- Select **Enabled** under **Record Security** and click **Save**

### How to Configure Data Security

Once Data Security has been enabled, users can begin to configure how this works in different areas of the account:

- Hover over **My Account** and select **Administration**
- Select **Data Security** from the Access & Security section on the left-hand side

- Select **Data Restrictions** from the menu on the left-hand side
- Choose the relevant section from the sub-menu on the left-hand side. For example, select 'Staff' if you wish to configure the record security for the Staff database
- The **Default Record State** field determines whether records in this area are either automatically set to **Restricted** or automatically set to **Un-restricted**. If records are automatically set to **Restricted**, then by default they will only be accessible to Administrators and the creator of the record. An Administrator or the record creator will need to explicitly give access to other users that need access to it. If records are automatically set to **Un-restricted**, then by default they will be accessible to all users that can access this database. An Administrator or the record creator will need to explicitly restrict the records that they wish to limit to certain users
- The **Un-restricted Fields** and **Un-restricted Pages** areas enable Administrators to make certain parts of the records in this database public. The pages and fields selected in these areas are available to all users, regardless of whether records have been restricted or not

To set all records in the database to either **Restricted** or **Un-restricted**\*

- Click on **Actions** and select **Set for ALL Records**
- In the **Set All Records To** field, select either **Restricted** or **Un-restricted**

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\* This process is not reversible, please use with caution

- Click **Save**

### How to Set Data Security for Multiple Records

- Hover over **My Account** and select **Administration**
- Select **Data Security** from the Access & Security section on the left-hand side
- Select **Bulk Additions** from the sub-menu on the left-hand side
- In the **Setup** area, select the **Users** and/or **User Groups** that you wish to assign records to
- In the **Record Type** field, select the kind of records that you wish to manage security for, such as 'Participant' records
- In the **Search Type** field, choose how you would like to search for the records
- Click **Save**
- After searching for the relevant records, click on the name of each record and then click **Add**
- Once you have finished selecting records, click **Confirm**

The selected records will be assigned to the chosen **Users** and/or **User Groups**.

## How to Create Access Rules

Access rules allow Administrators to automate the process of assigning records to specific **Users** and/or **User Groups**. By creating a statistic query and then building an access rule based on this, records can be assigned to certain users whenever they meet particular criteria. For example, a Participant record could be assigned to all users in a particular department, whenever the Participant attends a session that is linked to that department. To create an access rule:

- Hover over **My Account** and select **Administration**
- Select **Data Security** from the Access & Security section on the left-hand side
- Select **Access Rules** from the sub-menu on the left-hand side
- Click on the plus  icon
- In the **Setup** area, select the **Users** and/or **User Groups** that you wish to assign records to
- In the **Record Type** field, select the kind of records that you wish to manage security for, such as 'Participant' records
- Click **Select**



- Choose a saved statistic<sup>†</sup> and then click **Display Preview**
- Click **Submit**
- Enter a **Name** and **Description** for the Rule, and then click **Create**

The access rule has been created and will be updated each time a user logs into the account.

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<sup>†</sup> For information on creating and saving statistics, see the <https://www.substance.net/wp-content/uploads/How-to-create-a-statistic.pdf> support guide