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Introduction

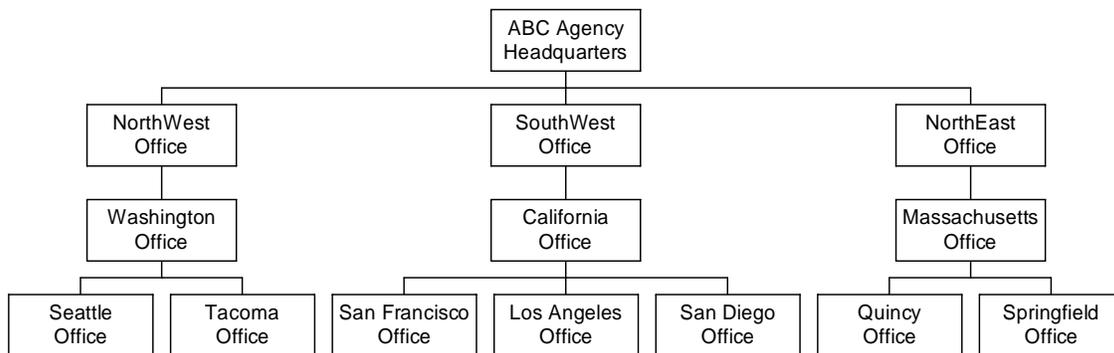
An Office Hierarchy is used when an organization wants to set up the offices to resemble the organization hierarchy. The hierarchy enables a user from the parent office to view the data from the lower offices and depending on the mode, the user can act as a user within the other offices.

Enterprise Office Hierarchy

In order to make use of the Enterprise View; the office hierarchy must be structured. To establish an office hierarchy, at least two offices must be involved and the parent and child office relationship has to be defined.

To define the Parent/Child relationship, the administrator from the System Office (OfficeID = 1) must create these offices and define the hierarchy.

To create the following hierarchy:



1. Create the following offices. Note that only those with System Administrator rights can create offices.
 - a. ABC Agency
 - b. SouthWest
 - c. NorthEast
 - d. NorthWest
 - e. Washington
 - f. California
 - g. Massachusetts
 - h. Seattle
 - i. Tacoma
 - j. San Francisco
 - k. Los Angeles
 - l. San Diego
 - m. Quincy
 - n. Springfield
2. Select **Enterprise Office Hierarchy** from the **Office Setup** expanded menu.
3. Click the **Add New Root Office** button to open the New Office Hierarchy dialog box.

4. Enter **ABC Agency** in the Parent Office field, enter **NorthWest** in the Child Office field and then click the **OK** button.



5. In the Office Hierarchy – Enterprise Structure, select the Parent Office and then add the rest of the child offices by clicking the **Add New Child Office** button to open the New Office Hierarchy dialog box.
6. Specify the Child Office and then click the **OK** button.
7. Repeat Steps 5 and 6 as necessary.



8. To establish the third level of the hierarchy, from the Office Hierarchy – Enterprise Structure, select the appropriate second level office and then click the **Add New Child Office** button.
9. Specify the Child Office and then click the **OK** button.
10. Repeat Steps 8 and 9 until the entire hierarchy is complete.



Enterprise Concept

Enterprise View is used to view child office data within the lower branches of the hierarchy. There are two general types of records. Contact-centric records can be seen from the child office while in Enterprise View. Shared Resource records include Filters, Dynamic Reports, Vendor, Product and Security Master records. In the non-impersonating Enterprise View modes, the Shared Resource records display only those records from the logged-in office and any records from the office above that office.

Using the Office Hierarchy described above, the list of Shared Resources will differ based on the Enterprise View mode selected. Using the previous example, if an Enterprise View user logs into the ABC Agency office and searches for the following items, the following information will display.

	Enterprise Off	Enterprise View – Non-Impersonating	Enterprise View - Impersonating
System Office	System_Vendor System_Filters System_Dyn_Report System_SecMaster System_Product	N/A	N/A
ABC Agency - Enterprise View User	System_Vendor System_Filters System_Dyn_Report System_SecMaster System_Product ABCAgency_Vendor ABCAgency_Filters ABCAgency_Dyn_Report ABCAgency_SecMaster ABCAgency_Product	System_Vendor System_Filters System_Dyn_Report System_SecMaster System_Product ABCAgency_Vendor ABCAgency_Filters ABCAgency_Dyn_Report ABCAgency_SecMaster ABCAgency_Product	N/A
NorthWest	N/A	System_Vendor System_Filters System_Dyn_Report System_SecMaster System_Product ABCAgency_Vendor ABCAgency_Filters ABCAgency_Dyn_Report ABCAgency_SecMaster ABCAgency_Product	System_Vendor System_Filters System_Dyn_Report System_SecMaster System_Product ABCAgency_Vendor ABCAgency_Filters ABCAgency_Dyn_Report ABCAgency_SecMaster ABCAgency_Product NorthWest_Vendor NorthWest_Filters NorthWest_Dyn_Report NorthWest_SecMaster NorthWest_Product

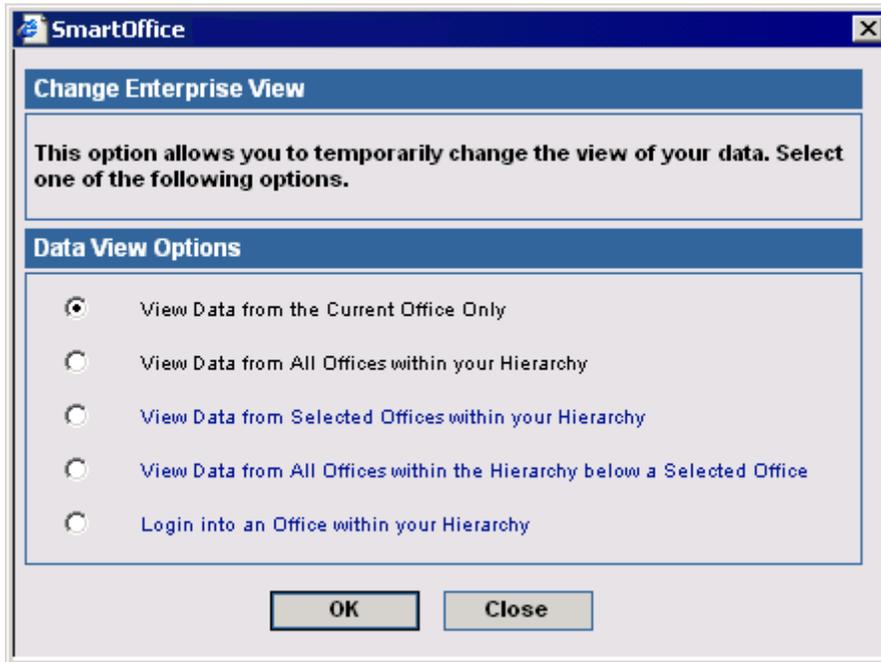
Washington	N/A	System_Vendor System_Filters System_Dyn_Report System_SecMaster System_Product ABCAgency_Vendor ABCAgency_Filters ABCAgency_Dyn_Report ABCAgency_SecMaster ABCAgency_Product	System_Vendor System_Filters System_Dyn_Report System_SecMaster System_Product ABCAgency_Vendor ABCAgency_Filters ABCAgency_Dyn_Report ABCAgency_SecMaster ABCAgency_Product NorthWest_Vendor NorthWest_Filters NorthWest_Dyn_Report NorthWest_SecMaster NorthWest_Product Washington_Vendor Washington_Filters Washington_Dyn_Report Washington_SecMaster Washington_Product
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When impersonating an office, the User Roles/Licenses are brought forth from the logged-in office. The Enterprise View works and acts as if the user is from the impersonating office. The only difference is that if the user has the Enterprise View mode turned on, the user is acting as a Super User that can bypass the User Proxy and User Assignment rules.

Enterprise View Mode

There are two Enterprise View modes. The first of the two types is the Basic Enterprise View that presents several ways to view data. The second type is the Impersonating Office Mode that enables a user to log into different offices within the hierarchy.

Click the **Enterprise View** hyperlink on the Menu Bar to open the Change Enterprise View dialog box.



In the Change Enterprise View dialog box, the second, third and fourth options represent the Basic Enterprise View. The fifth option enables the Impersonating Office Mode.

For example, log into the NorthEast office, enable the Enterprise View option and then choose the following options to arrive at the following results:

- **View Data from the Current Office Only:** The Enterprise View is turned off and the user acts as the user within the office following the User Proxy and User Assignment rule when the office security is turned on.
- **View Data from All Offices within your Hierarchy:** The Enterprise View is turned on and the user is now able to view the Data from the NorthEast, Massachusetts, Quincy and Springfield offices.
- **View Data from Selected Offices within your Hierarchy:** The Enterprise View is turned on and the view of the data is based on the offices selected by the user. The data is of the subset of NorthEast, Massachusetts, Quincy and Springfield offices except for the Shared Resources.

- View Data from All Offices within the Hierarchy below a Selected Office: The Enterprise View is turned on and the view of the data is based on the offices selected by the user. For example, if the user selects the NorthEast office, then the Massachusetts, Quincy and Springfield offices display. If the user selects the Massachusetts office, the Quincy and Springfield offices display. Note that if the Massachusetts office only had a single child office below AND if the user selects the Massachusetts office, the Enterprise View mode will default to the Impersonating Office Mode.
- Log in to an Office within your Hierarchy: The Enterprise View is turned on and the view is of the Impersonating Office. The user views and acts as if they were a user from the impersonating office. Note that the office will not be selectable unless the office administrator for each office manually gives permission to allow for impersonation from the parent offices. This option does not block impersonation ability specific to a particular parent office. It is either allowed or disallowed.

Partial Hierarchy Definition

The Partial Hierarchy Definition is used by the office administrator to restrict the view of specific hierarchical branches from the Enterprise View user. This restriction can be made to the branches immediate to the user's office. In the hierarchical example, the administrator of ABC Agency can limit the enterprise view user in that office to displaying the office data of the NorthWest, SouthWest and NorthEast branches. Note that the administrator from the ABC Agency will not be able to limit the Enterprise View user from viewing the NorthEast branch, but can only limit access to the Quincy office.

To limit access to some branches of the hierarchy:

1. Select **User Management** from the **User Setup** expanded menu.
2. Select the appropriate Enterprise View user and then select the **Partial Hierarchy Definition** tab.
3. Select the appropriate offices and then click the **Save** button to restrict the view to only those branches.

