



Lectra Fashion PLM V5

Security in Product Developer

April 2016

Strictly confidential



Table of contents

Introduction	3
Security on Product Developer	4
Manage rights to users and groups	11
Manage actions rights	13
Definition of Profile Key	17
Manage actions rights	23
Appendix	39



Introduction

Security, what is it for?

The objective of **Product Developer** is to facilitate our customers' life.

The most important thing for the **Product Developer** user is to create products and share their specifications with other partners.

Secondly, he wants to protect his creation from undesirable users to avoid an accident that can corrupt data:

- Suppliers who should work only on some products.
- Competitors who always try to copy success stories.

Remember that some people may have bad intentions for products that other people have created.

The **Product Developer** security feature offers the protection against this.



Security in Product Developer?

Security ensures confidentiality and data protection by assigning access rights to groups and users

The mechanism is developed to cover all the protection perimeters needed by our customers.

Product Developer ensures confidentiality and protection from user login to rights concerning the data.

Therefore, depending on the customer requirements, security will be easy to ensure or very complex to configure.

- 1) Forbid access to all styles.
- 2) Give full access to the creator.
- 3) Make the access possible to only allow the update of Fitting on Style to the selected supplier.



Objectives

To protect final data, **Product Developer** offers different possibilities. The objective of this course is to give all the information to manage Product Developer security.

- **Access to Product Developer**
 - User
 - Group

- **Methods to secure**
 - Product Developer actions
 - Product Developer data

- **Profile configuration**
 - CRUD actions
 - PLM Manager
 - Excel template



Product Developer User

The user is the key player in Product Developer.

He belongs to the owner company of the Product Developer or to the subcontractor.

Inside the company, his job is clearly defined: manager, designer...

The user is identified by his name, surname and email address.

The Product Developer administrator will create an account for him with the appropriate authorizations for his assignments.

The user will access the Product Developer with a login name and password.

The login is the key entry of Product Developer security.

The password should be secured and personal.



Product Developer Special users

Some users are already created by the system:

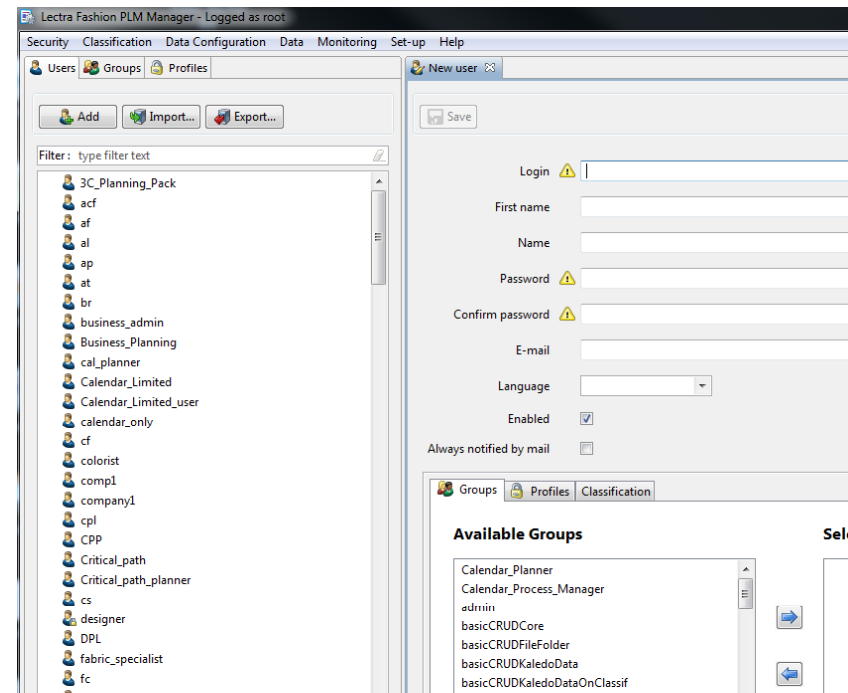
- **admin:** only used for the installation and deployment of Product Developer
- **root:** the administrator who has all the rights in the PLM Manager and Product Developer.
Strongly recommended to change his default password.



Create a user with PLM Manager

Easy way to create a user with the PLM Manager:

1. Connect to the PLM Manager as administrator (root).
2. Click on **Security** menu and select **Users**.
3. Click on **Add**.
4. Enter **Login**.
5. Enter value for other fields.
6. **Save**.





Product Developer Group

The Group is a list of users belonging to the same organization or located in the same place.

It can also be a list of sub groups. The higher group is called « Parent » group and the groups included in it are known as « Children ».

The group is identified by its name.

A group can have:

- Inner groups, which correspond to Children groups,
- Outer groups, which correspond to Parent groups,
- Users associated to this group.

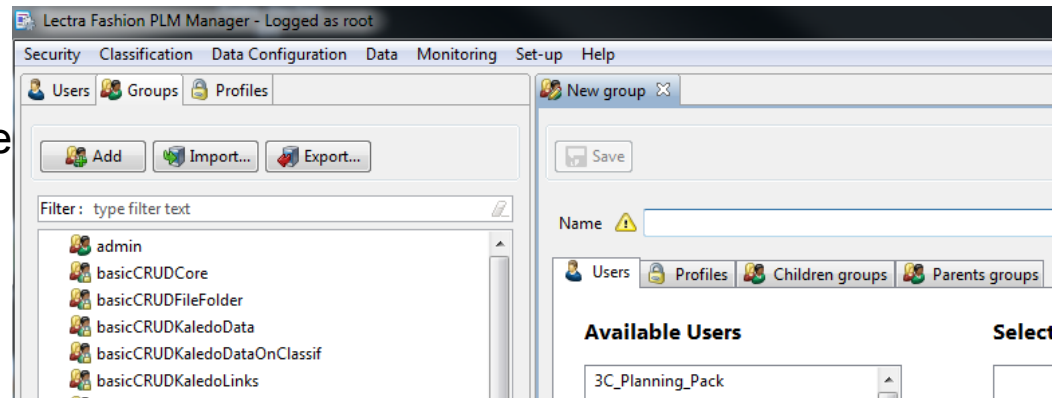
Groups examples: admin, design, controller



Create a group with PLM Manager

Easy way to create a group with the PLM Manager:

1. Connect to the PLM Manager as administrator (root).
2. Click on the **Security** menu and select **Groups**.
3. Click on **Add**.
4. Enter the new group name
5. **Save**.





Manage actions rights

The profiles



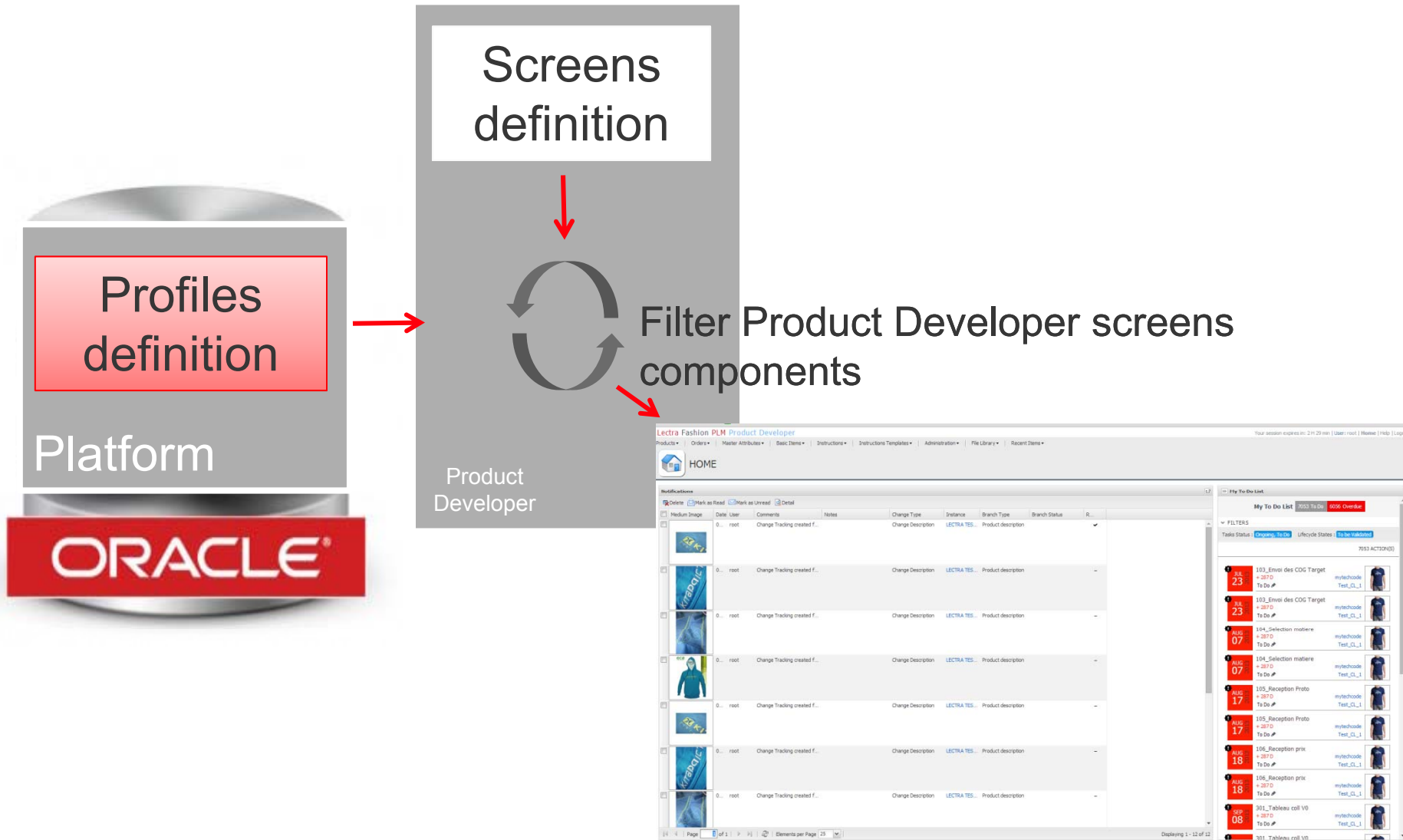
Security by Product Developer actions: Profiles

Generalities:

- A (extended) profile is used by Product Developer to display or not actions buttons and several parts of the product elements.
- It is a set of (key, value) that allows an action (search, edit, and delete, print).
- The profile will provide the first level of protection (access actions).
For instance, a profile can remove the EDIT action on style GO.
- The profile provides control over global data.
The final read/write access to specific data is given by the access right (security rights).
- The profile can be affected to the user or to the group.



Profile mechanism





How to limit rights?

Two ways to limit rights to a user or a group with profiles:

1. Allow access for **each action** you want to enable for the user or group.
2. Allow access for **all actions**, and then **disabling each action** you want to hide for the user or group.

The choice of the method to implement rights depends on the profile you want to create:

- If profile contains **mainly** limited access (compare to administrator profile), use method **1**.
- If profile is **close to** administrator profile (just limit some actions), use method **2**.

Definition of Profile Key

Type, Branch, SpecTable and Action

Profile: Key & Value

The profile key is defined by following information:

- The '**Type**' of Product Developer entity (from data model) which matches items of top menu (for example: 'Style')
- The '**Branch**' of Product Developer product which matches all SpecPackages, Axis, Skus and Assortments.
- The '**SpecTable**' of Product Developer SpecPackage, Axis or Assortments which matches specific part (or object from data model) of one of those product definitions. (it is possible to specify the BOM category of SpecPackage *BOM BOL Cost*)
- The '**Action**' which is the explicit enabled/disabled action name. (for example: 'display')
- The '**Tag**' which is used to filter blocks in screens.xml where attribute 'extendedProfileTag' is set.

The profile value is defined by a boolean value 'true' or 'false' to enable or to disable right.

(Enable='true' & Disable='false')



Type

All

Products

All_Styles
 All_Fabrics
 All_Trims
 All_PackagingLabels
 Style
 Fabric
 Trims
 PackagingLabel
 + subcategories
 + custom products

Orders

PrototypeOrderLine
 ComponentOrderLine

Basic Items (EnvItems)

Material
 CareLabel
 Currency
CompositionSet

Master Attributes (EnvItems)

All_EnvItems
 MarketingColor
 TechnicalColor
 SizeRun
 FinalSize
 Company

Instructions (SpecItems)

All_SpecItems
 Construction
 Cost
 Label

Instruction Template (SpecItems Template)

All_Templates
 ConstructionTemplate
 CostTemplate
 LabelTemplate

Administration

SVL
 HVL
 I18n
 ResetPreferences
 DistributionLists
 CalendarManagement
 TemplateProcess

Collection Planning

CollectionPlans
 CollectionPlanColumnsAdministration
 ...

Top Menu of Header

Collections
 Product
 OrderLine
 Articlelibrary
 Basiclibrary
 SpecItems
 Templates
 Admin
 Filelibrary
 LastUsed

Other

Folder
 Node
 Report
 Specitem
 Template
 Screen
 Security_Tag
 Sku
 Orderline
 TaskManager
 AssortmentTA



Branch

All

Product GO

Axis

--

All_Skus

Sku

ColorApproval

Articles

....

Subsets

All_Assortments

Assortments_Style

Colorsway_StylePlana

+custom Subsets

SpecPackages

All_SpecPackages

SizeSpec

Construction

Label

Ornament

Packing

RequestForQuotesNG

CADSpec

SourcedCosting

CostingNG

FittingNG

QualityTest

TestingAndQANG

+ custom SpecPackages

Other

Component

Deliveries

Grading

Sales

Screen

Orders

StyleComponent

TrimsComponent

PackagingComponent

PriceApprobation

StylePrice



SpecTable

All

Sourced Cost

LandedCost

TestingAndQANG

Stage.ColorDefinition
SupplierCommunication
Stage

FittingNG

SupplierCommunication
Stage
Reception
PrototypeReception
Statistic
Stage

BOM BOL Cost

BOM
StyleComponent
FabricComponent
TrimsComponent
PackagingLabelComponent
BOM.PackagingLabelComponent
BOL
LandedCost
Margin

RequestForQuotesNG

Supplier
SupplierCommunication
Tracking
Supplier

SourcedCosting

LandedCost
SourcedCost

Other

SpLink
Stage
Reception
PrototypeReception

CADSpec

CADVariant
CADSize



Action

All

*

Main header

search
whereUsed
create
edit
setAsDefault
delete
print
...

Product

editCompositionSet
searchValidationTableLine
...

Top menu of header

Task

Report Templates

reportTemplate

Explorer

display
create
edit
delete
....

Product Explorer

massUpdate
addToCart
changeCategory

File Explorer

move
rename
download
Copy
unlock
...

Time and Action

Schedule
freezeBL
pauseResume
cleanWarnings

Calendar Management

makeWorkdayAction
makeNotWorkdayAction

Result tables

create
pick
localPublish
copy
paste
...

Request For Quotes

rfqItem
rfqProposal
...

BOM BOL Cost / Sourced Cost

synchronizePurchase2Simulation
applyToAllColor
applyToAllColorSize
....

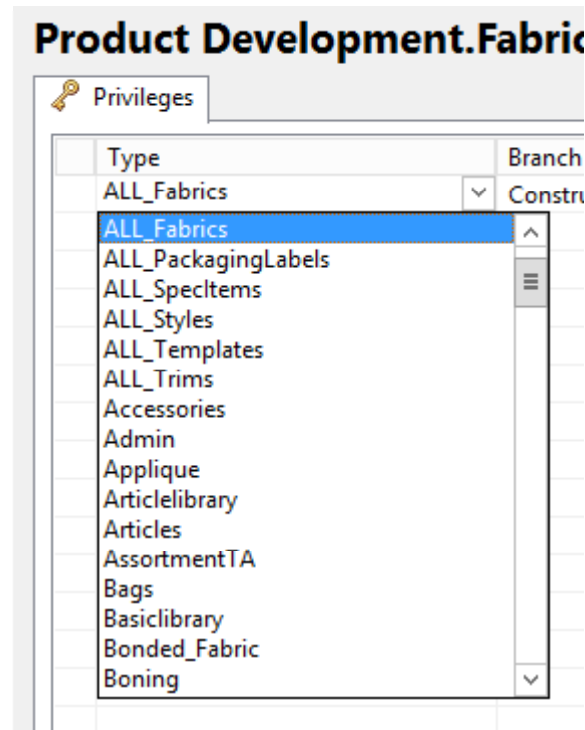
Lectra Board

copy
Delete
...



Profiles

Check PLMManager for full key listing





Manage actions rights

PLM Manager



Create Profile with PLM-Manager (1)

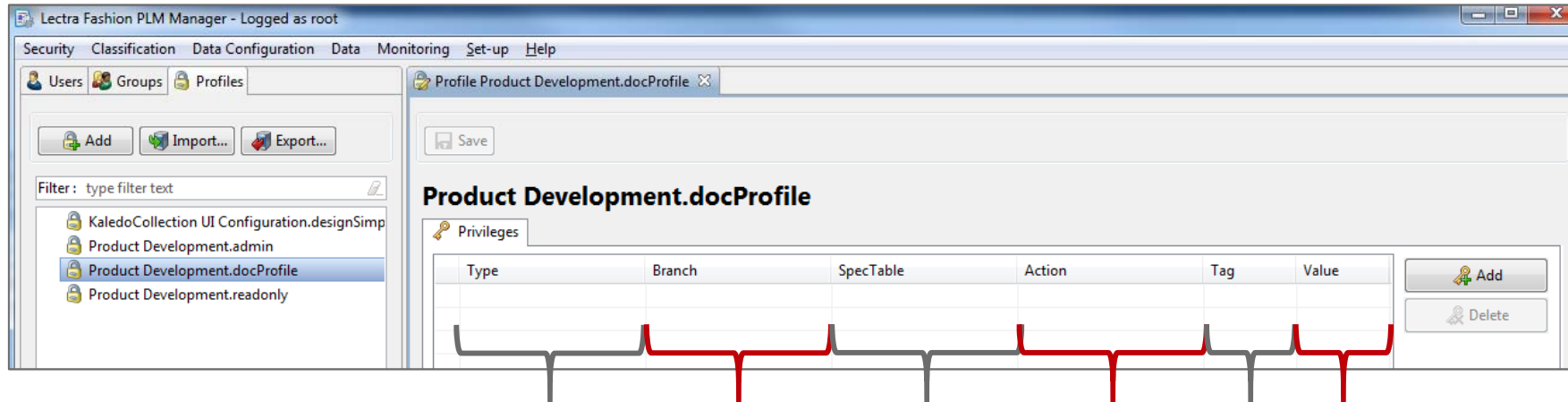
Easy way to create a profile with the PLM Manager:

1. Connect to the PLM Manager as administrator (root).
2. Click on **Security** menu and select **Profiles**.
3. Click on **Add**.
4. Enter the profile name and select namespace.
5. **Save**.



Create Profile with PLM-Manager (2)

Privileges:



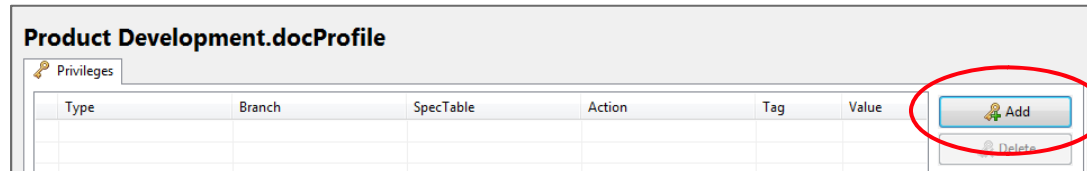
Privileges match profile definition (Key and Value).



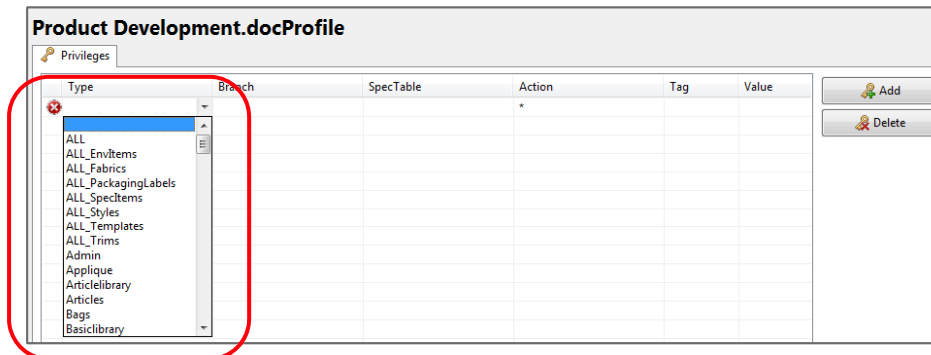
Create Profile with PLM-Manager (3)

Easy way to fill privileges:

1. Click on **Add**.

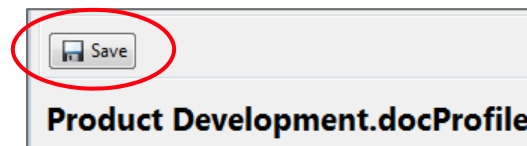


2. Configure profile key with a predefined selection.



3. Select profile value to enable or disable right.

4. **Save**.





Example (1)

Profile with all rights (administrator profile):

Product Development.admin

Privileges

Type	Branch	SpecTable	Action	Tag	Value
ALL			*		true
ALL	ALL		*		true
ALL	ALL	ALL	*		true
ALL			filteredSearch		false

Add
Delete

This profile already exists by default in PLM-Manager. It is called **admin**.

NB: The 'filteredSearch' must be set to **false** in all V3Rx versions.



Example (2)

Profile with all rights but **Delete** action (administrator profile):

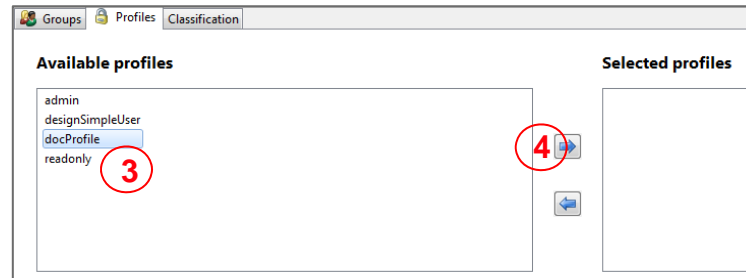
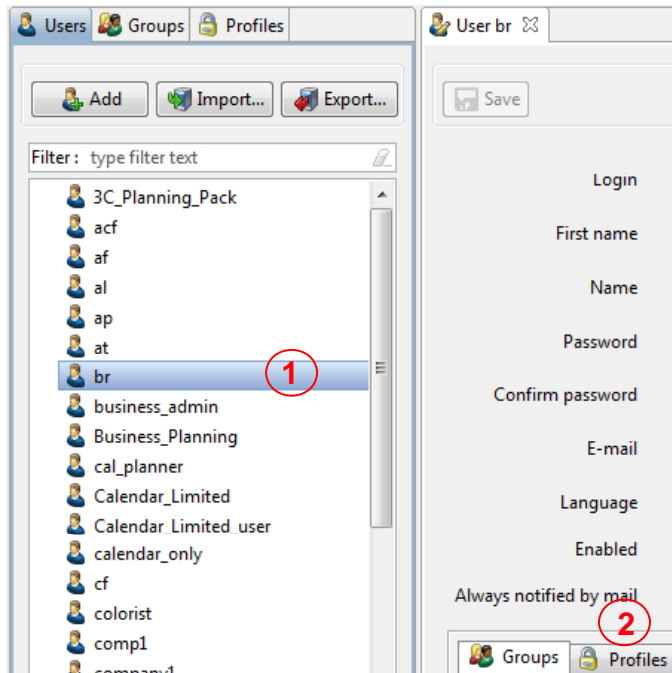
Product Development.docProfile					
Privileges					
Type	Branch	SpecTable	Action	Tag	Value
ALL			*		true
ALL	ALL		*		true
ALL	ALL	ALL	*		true
ALL			delete		false
ALL	ALL		delete		false
ALL	ALL	ALL	delete		false

To remove the **Delete** right, method **2** is chosen:

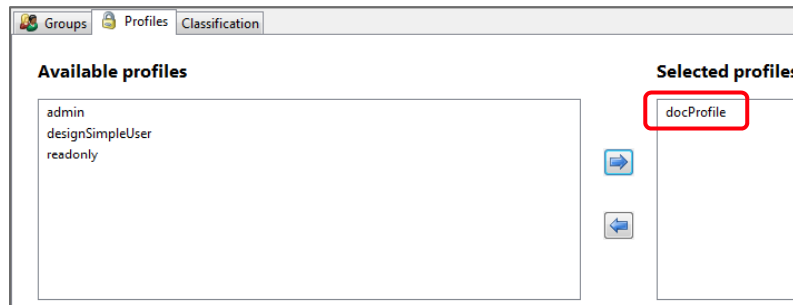
1. Define administrator rights (allow all access).
2. **Override** administrator rights to disable delete action.

Apply profile to user in PLM-Manager

Steps to apply docProfile profile to mb user:



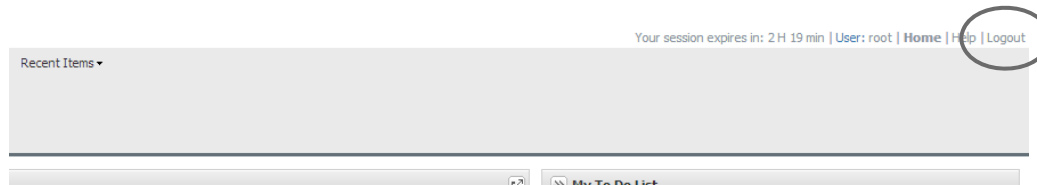
Result:



NB: Same procedure for group



How to verify profile changes in Product Developer?



Logout and login your user!



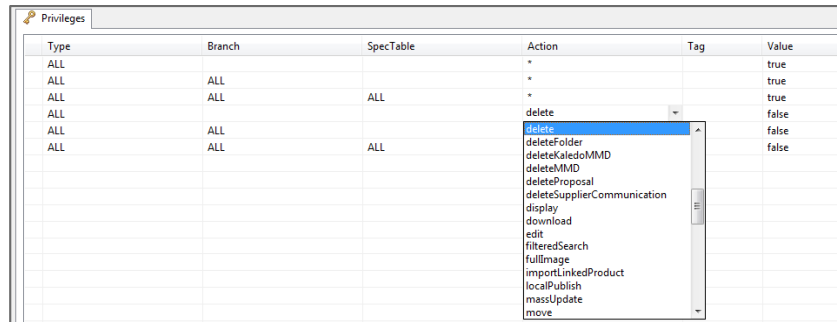


Manage actions rights

Mass-edit of rights

Two ways to mass-edit:

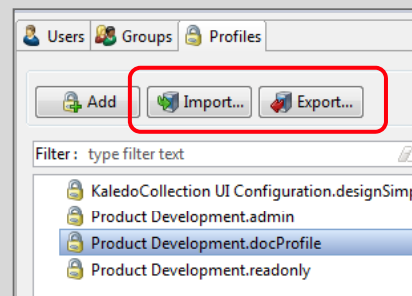
- By using the table of privileges in PLM-Manager



Type	Branch	SpecTable	Action	Tag	Value
ALL			*		true
ALL	ALL		*		true
ALL	ALL	ALL	*		true
ALL			delete		false
ALL	ALL		deleteFolder		false
ALL	ALL	ALL	deleteKaledoMMD		false
ALL			deleteMMD		false
			deleteProposal		
			deleteSupplierCommunication		
			display		
			download		
			edit		
			filteredSearch		
			fullImage		
			importLinkedProduct		
			localPublish		
			massUpdate		
			move		

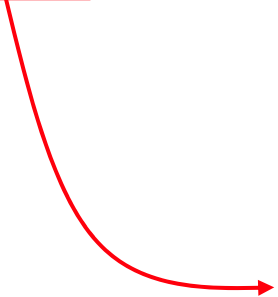
- By using security excel file from PLM-Manager export, which permits to manage users, groups and profiles in the same file.

✓ Recommended



Security Excel file from PLM-Manager (1)

Main Menu:



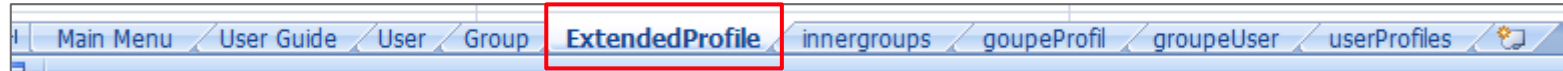
PLM Matching Table	
	User
	Group
	ExtendedProfile
XML	innergroups
	goupeProfil
	groupeUser
	userProfiles

Menu provides links to others tabs.



Security Excel file from PLM-Manager (2)

ExtendedProfile:



A	B	C	D
{security.process.ExtendedProfile}.name	{security.process.ExtendedProfile}.namespace	{security.process.ExtendedProfile}.namedData.name	{security.process.ExtendedProfile}.namedData.value
name	namespace	namedData.name	namedData.value
admin	pdm-Profile	[ACTION:*][TYPE:ALL][SPECPACKAGE:ALL][SPECTABLE:ALL]	true
admin	pdm-Profile	[ACTION:*][TYPE:ALL][SPECPACKAGE:ALL]	true
admin	pdm-Profile	[ACTION:*][TYPE:ALL]	true
admin	pdm-Profile	[ACTION:filteredSearch][TYPE:ALL]	false
docProfile	pdm-Profile	[ACTION:DELETE][TYPE:ALL][SPECPACKAGE:ALL]	false
docProfile	pdm-Profile	[ACTION:DELETE][TYPE:ALL][SPECPACKAGE:ALL][SPECTABLE:ALL]	false
docProfile	pdm-Profile	[ACTION:DELETE][TYPE:ALL]	false
docProfile	pdm-Profile	[ACTION:STAR][TYPE:ALL][SPECPACKAGE:ALL]	true
docProfile	pdm-Profile	[ACTION:STAR][TYPE:ALL][SPECPACKAGE:ALL][SPECTABLE:ALL]	true
docProfile	pdm-Profile	[ACTION:STAR][TYPE:ALL]	true
designSimpleUser	UI-Config	M_DB_Init_Classif	33317
designSimpleUser	UI-Config	M_TemplateUpLoad	33365
designSimpleUser	UI-Config	M_DB_CREATE	33261
designSimpleUser	UI-Config	M_DB_Edit_Classif	33375
readonly	pdm-Profile	[ACTION:search][TYPE:ALL]	true
readonly	pdm-Profile	[ACTION:display][TYPE:ALL]	true
readonly	pdm-Profile	[ACTION:task][TYPE:ALL]	true
readonly	pdm-Profile	[ACTION:search][TYPE:ALL][SPECPACKAGE:ALL]	true
readonly	pdm-Profile	[ACTION:task][TYPE:ALL][SPECPACKAGE:ALL][SPECTABLE:ALL]	true
readonly	pdm-Profile	[ACTION:task][TYPE:ALL][SPECPACKAGE:ALL]	true
readonly	pdm-Profile	[ACTION:display][TYPE:ALL][SPECPACKAGE:ALL]	true
readonly	pdm-Profile	[ACTION:filteredSearch][TYPE:ALL]	false
readonly	pdm-Profile	[ACTION:display][TYPE:ALL][SPECPACKAGE:ALL][SPECTABLE:ALL]	true
readonly	pdm-Profile	[ACTION:search][TYPE:ALL][SPECPACKAGE:ALL][SPECTABLE:ALL]	true

Name

Namespace

Key

Value



Key grammar (1)

The basic grammar for each key is as follows:

```
[ACTION : theAction][TYPE : theType][SPECPACKAGE :  
theSpecPackage][SPECTABLE : theSpecTable]
```

The SPECPACKAGE and SPECTABLE blocks are optional.

- In theType, theSpecPackage, theSpecTable, the reserved word **ALL** can be used. It indicates that the actions will be applied to all (at the selected level)
- In theType, a category, an object type (*Product, EnvItem*, etc : in top menu), a type of envItem (*MarketingColor, Size*, etc.) can be set.
- In theSpecPackage, any type of *SKU, Assortments, SpecPackage*, or *Axis* (parameter 'Branch' of profile key) can be set.
- In theSpecTable, a type of spec table or componentLink (a category for the *BOM*) can be set.



Key grammar (2)

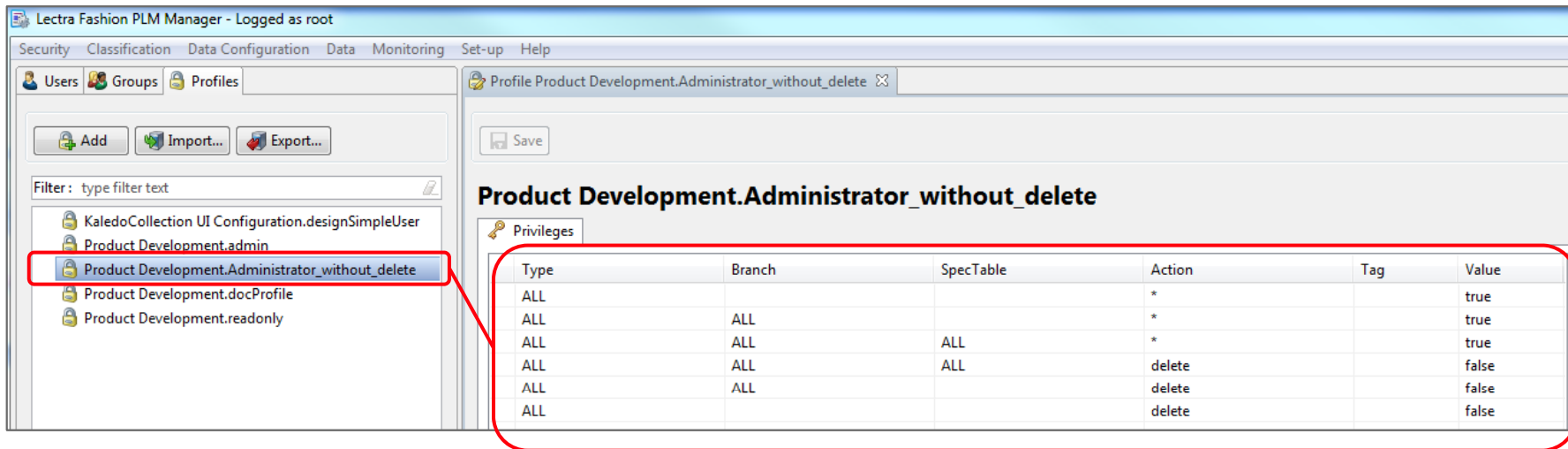
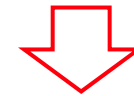
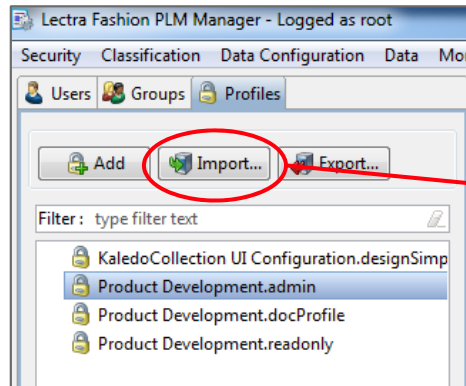
For the TYPE and SPECPACKAGE blocks, an attribute can be added: @theTag :

- [ACTION : display][TYPE : Style @bloc1]
- [ACTION : edit][TYPE : Style][SPECPACKAGE : ALL@bloc2]

theTag is used to filter blocks in screens.xml where attribute 'extendedProfileTag' is set.

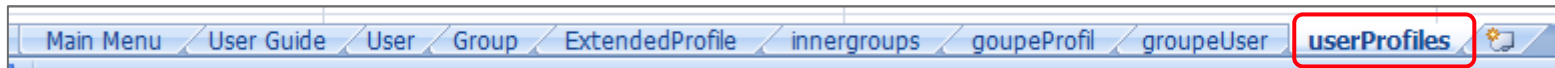


Import Security Excel file in PLM-Manager



Apply profile to user in Security excel file

Steps to apply **docProfile** profile to mb user:



Before:

<code>{security.process.User}.name</code>	<code>{security.process.User}.xtdProfiles.name</code>	<code>{security.process.User}.xtdProfiles.namespace</code>
fc	admin	pdm-Profile
root	admin	pdm-Profile

After:

<code>{security.process.User}.name</code>	<code>{security.process.User}.xtdProfiles.name</code>	<code>{security.process.User}.xtdProfiles.namespace</code>
mb	docProfile	pdm-Profile
fc	admin	pdm-Profile
root	admin	pdm-Profile

User

Profile
Name

Profile Namespace
(Product Developer)

NB: Same procedure for group



Appendix

Manage with XML files

Create a user by XML script

XML syntax to create the user John:

```
<user name="John" password="JohnPassword">  
  <email>email@email.com</email>  
  <xtprofile>...</xtprofile>  
</user>
```

Run the xml file in the plm-console.

Be careful with the password as it is not encrypted in the xml file.

- affect a default password.
- change the password in Product Developer.



Create a group by XML script

XML syntax to add a new group:

```
<group name="limited_controller" >  
  <father>controller</father>  
  <user>user_limited_controller</user>  
  <xdprofile>...</xdprofile>  
</group>
```

Run the xml file in the plm-console.

A group contains only 1 father inheriting from 'enterprise' .



Create Profile by XML script (1)

The basic grammar for each key is as follows:

```
[ACTION : theAction][TYPE : theType][SPECPACKAGE :  
theSpecPackage][SPECTABLE : theSpecTable]
```

The SPECPACKAGE and SPECTABLE blocks are optional.

- In theType, theSpecPackage, theSpecTable, the reserved word **ALL** can be used. It indicates that the actions will be applied to all (at the selected level)
- In theType, a category, an object type (*Product, EnvItem*, etc : in top menu) a type of envItem (*MarketingColor, Size*, etc.) can be set.
- In theSpecPackage, any type of *SKU, Assortments, SpecPackage*, or *Axis* (parameter 'Branch' of profile key) can be set.
- In theSpecTable, a type of spec table or componentLink (a category for the *BOM*) can be set.



Create Profile by XML script (2)

For the TYPE and SPECPACKAGE blocks, an attribute can be added: @theTag

- [ACTION : display][TYPE : Style @bloc1]
- [ACTION : edit][TYPE : Style][SPECPACKAGE : ALL@bloc2]

theTag is used to filter blocks in screens.xml where attribute 'extendedProfileTag' is set.

Template of script:

```
<?xml version="1.0" encoding="utf-8"?>
<init>
  <xtprofile namespace="pdm-Profile" name="Profile_name">
    <data key="[ACTION:xxx] [TYPE:xxx] [SPECPACKAGE:xxx] [SPECTABLE:xxx]" value="xxx" />
  </xtprofile>
</init>
```



Example of XML scripts (1)

Profile with all rights (administrator profile):

```
<?xml version="1.0" encoding="utf-8"?>
<init>
  <xtprofile namespace="pdm-Profile" name="Administrator">
    <data key="[ACTION:*][TYPE:ALL]" value="true" />
    <data key="[ACTION:*][TYPE:ALL][SPECPACKAGE:ALL]" value="true" />
    <data key="[ACTION:*][TYPE:ALL][SPECPACKAGE:ALL][SPECTABLE:ALL]" value="true" />
  </xtprofile>
</init>
```

*An asterisk * is used to indicate that all actions are available for a given type, SpecPackage and SpecTable.*

Example of XML scripts (2)

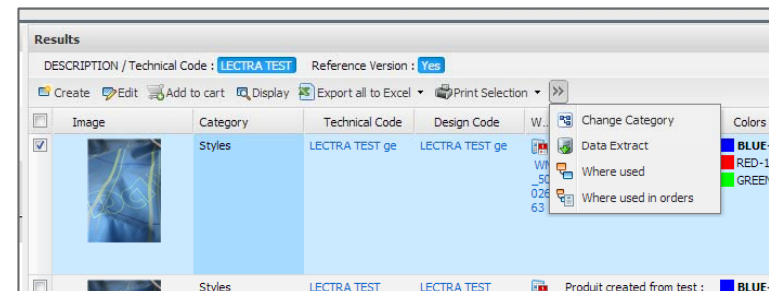
Profile with all rights except **delete** action:

```
<?xml version="1.0" encoding="utf-8"?>
<init>
  <xtprofile namespace="pdm-Profile" name="Administrator_without_delete">
    <!-- Administrator rights -->
    <data key="[ACTION:*] [TYPE:ALL]" value="true" />
    <data key="[ACTION:*] [TYPE:ALL] [SPECPACKAGE:ALL]" value="true" />
    <data key="[ACTION:*] [TYPE:ALL] [SPECPACKAGE:ALL] [SPECTABLE:ALL]" value="true" />

    <!-- Override administrator rights to disable delete action -->
    <data key="[ACTION:delete] [TYPE:ALL]" value="false" />
    <data key="[ACTION:delete] [TYPE:ALL] [SPECPACKAGE:ALL]" value="false" />
    <data key="[ACTION:delete] [TYPE:ALL] [SPECPACKAGE:ALL] [SPECTABLE:ALL]" value="false" />
  </xtprofile>
</init>
```

To remove the **Delete** right, **method 2** is chosen:

1. enable all rights (as administrator)
2. **override** administrator rights by disabling action right.





Configure profiles in Security Excel file

Example: Correspondence XML and Excel (only in V3Rx):

```
<?xml version="1.0" encoding="utf-8"?>
<init>
  <xdprofile namespace="pdm-Profile" name="Administrator_without_delete">
    <!-- Administrator rights -->
    <data key="[ACTION:*][TYPE:ALL]" value="true" />
    <data key="[ACTION:*][TYPE:ALL][SPECPACKAGE:ALL]" value="true" />
    <data key="[ACTION:*][TYPE:ALL][SPECPACKAGE:ALL][SPECTABLE:ALL]" value="true" />

    <!-- Override administrator rights to disable delete action -->
    <data key="[ACTION:delete][TYPE:ALL]" value="false" />
    <data key="[ACTION:delete][TYPE:ALL][SPECPACKAGE:ALL]" value="false" />
    <data key="[ACTION:delete][TYPE:ALL][SPECPACKAGE:ALL][SPECTABLE:ALL]" value="false" />
  </xdprofile>
</init>
```

XML to Excel ↓ Same key!

{security.process.ExtendedProfile}.name	{security.process.ExtendedProfile}.namespace	{security.process.ExtendedProfile}.namedData.name	{security.process.ExtendedProfile}.namedData.value
docProfile	pdm-Profile	[ACTION:*][TYPE:ALL]	true
docProfile	pdm-Profile	[ACTION:*][TYPE:ALL][SPECPACKAGE:ALL]	true
docProfile	pdm-Profile	[ACTION:*][TYPE:ALL][SPECPACKAGE:ALL][SPECTABLE:ALL]	true
docProfile	pdm-Profile	[ACTION:DELETE][TYPE:ALL]	false
docProfile	pdm-Profile	[ACTION:DELETE][TYPE:ALL][SPECPACKAGE:ALL]	false
docProfile	pdm-Profile	[ACTION:DELETE][TYPE:ALL][SPECPACKAGE:ALL][SPECTABLE:ALL]	false