

GROUP PERMISSIONS

DOCUMENT MANAGEMENT

- Doc Delete: Ability to logically delete documents.
- Doc Export/Email: Ability to export and email documents.
- Doc Hold: Ability to place a “hold” on a document, making it so the document cannot be modified until the “hold” is removed.
- Release Hold: Ability to release a hold on all documents the user can access.
- Doc Finalize: Ability to finalize a document, making it so it can no longer be modified in any way.
- Doc Check-In/Out: Ability to check a document out, then back in as a new version.
- Release Check-Out: Ability to release checked out documents.
- Recover: Ability to recover logically deleted documents and folders, as well as document versions.
- Doc View: Ability to view documents.
- Doc Add: Ability to add new documents.
- Doc Edit: Ability to edit documents.
- Process Mail Merge: Ability to process mail merge templates.
- Mail Merge Template: Ability to create mail merge templates.
- Workflow/Onboard: Ability to add, edit and delete Workflows and Onboards.
- Retention: Ability to add, edit and delete Retention Settings.

CM MANAGEMENT

- CM Read: Ability to view the CM menu in PinPoint.
- CM Edit: Ability to add and edit Campaigns, Opportunities, Reminders, Appointments and CM Templates.
- CM Delete: Ability to delete Campaigns, Opportunities, Reminders, Appointments and CM Templates.
- CM Acc Read: Ability to view Accounts and Contacts.
- CM Acc Edit: Ability to add and edit Accounts and Contacts.
- CM Acc Delete: Ability to delete Accounts and Contacts.

SECURITY MANAGEMENT

- Group: Ability to add, edit and delete security groups.
- User: Ability to add, edit and delete non-Super Users.
- Audit Log: Ability to access the system Audit Log, showing all activity within the system.
- Distribution/Temp/Prox: Ability to add, edit and delete Distribution Rules, Templates and Proximity Search.
- Report: Ability to run all system reports.

STRUCTURE MANAGEMENT

- Doc Type Add: Ability to create document types.
- Doc Type Edit: Ability to edit existing document types.
- Doc Type Delete: Ability to delete document types that are not being used.
- Cabinet Add: Ability to create cabinets.
- Cabinet Edit: Ability to edit existing cabinets.
- Cabinet Delete: Ability to delete empty cabinets.
- Manage Folder: Ability to add, edit and delete folders.
- LMS: Ability to Manage Courses.