

Manage Groups

From the menu on the left-side of the screen, click Admin, then click Groups under the third column: Security Management.

Add Group

1. Click the Add Group button.

Group Name Check All Permissions Save Clear

Document Management

Doc View Doc Add Doc Edit Doc Type Add Doc Type Edit Doc Type Delete

Doc Delete Doc Hold Finalize Doc Cabinet Add Cabinet Edit Cabinet Delete

Doc Check Out Doc Export/Email Retention Manage Folder LMS HTML Forms

Workflow/Onboard Mail Merge MM Template

Release Check-Out Release Hold Recover

Security Management

Group User Audit Log CM Read CM Edit CM Delete

Reports Distribution/Temp/Prox CM Acc Read CM Acc Edit CM Acc Delete

Date Added: Date Edited: Last User:

2. In the pop-up window, enter the Group Name.
3. Select the default permissions for the group.
4. Click the Save button when finished.

Assign Group to Filerroom

Actions	Group Name	<input type="checkbox"/> Doc View	<input type="checkbox"/> Doc Add	<input type="checkbox"/> Doc Edit	<input type="checkbox"/> Doc Delete	<input type="checkbox"/> Doc Hold	<input type="checkbox"/> Doc Finalize	<input type="checkbox"/> Doc Check Out	<input type="checkbox"/> Doc Export/Email	<input type="checkbox"/> Retention	<input type="checkbox"/> Workflow/Onboard	<input type="checkbox"/> Mail Merge
	<input type="checkbox"/> Admin Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
	<input type="checkbox"/> Class Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
	<input type="checkbox"/> Trial User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					

1. Under the Actions column, click the Manage Filerrooms button next to the group.
2. In the pop-up window, add the filerrooms you want the group assigned to.
3. Close the window when finished.

Add Users to Existing Group

Actions	Group Name	<input type="checkbox"/> Doc View	<input type="checkbox"/> Doc Add	<input type="checkbox"/> Doc Edit	<input type="checkbox"/> Doc Delete	<input type="checkbox"/> Doc Hold	<input type="checkbox"/> Doc Finalize	<input type="checkbox"/> Doc Check Out	<input type="checkbox"/> Doc Export/Email	<input type="checkbox"/> Retention	<input type="checkbox"/> Workflow/Onboard	<input type="checkbox"/> Mail Merge
	<input type="checkbox"/> Admin Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
	<input type="checkbox"/> Class Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
	<input type="checkbox"/> Trial User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					

1. Under the Actions column, click the Add Users button next to the group.
2. In the pop-up window, add the users you want in the group.
3. Close the window when finished.

Edit User Permissions within Existing Group

Actions	Group Name	<input type="checkbox"/> Doc View	<input type="checkbox"/> Doc Add	<input type="checkbox"/> Doc Edit	<input type="checkbox"/> Doc Delete	<input type="checkbox"/> Doc Hold	<input type="checkbox"/> Doc Finalize	<input type="checkbox"/> Doc Check Out	<input type="checkbox"/> Doc Export/Email	<input type="checkbox"/> Retention	<input type="checkbox"/> Workflow/Onboard	<input type="checkbox"/> Mail Merge
	<input type="checkbox"/> Admin Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
	<input type="checkbox"/> Class Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
	<input type="checkbox"/> Trial User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					

1. Under the Actions column, click the Add Users button next to the group.
2. In the pop-up window, edit the user permissions as needed.
3. Click the Save button when finished.
 - Clicking the Set Default button will set all users permissions to the default permissions set for the group.

Edit Default Permissions for Group

Actions	Group Name	<input type="checkbox"/> Doc View	<input type="checkbox"/> Doc Add	<input type="checkbox"/> Doc Edit	<input type="checkbox"/> Doc Delete	<input type="checkbox"/> Doc Hold	<input type="checkbox"/> Doc Finalize	<input type="checkbox"/> Doc Check Out	<input type="checkbox"/> Doc Export/Email	<input type="checkbox"/> Retention	<input type="checkbox"/> Workflow/Onboard	<input type="checkbox"/> Mail Merge
	<input type="checkbox"/> Admin Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
	<input type="checkbox"/> Class Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
	<input type="checkbox"/> Trial User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					

1. Click the Group Name.
2. Update the default permissions for the group.
3. Click the Save button when finished.

Delete Group

Actions	Group Name	<input type="checkbox"/> Doc View	<input type="checkbox"/> Doc Add	<input type="checkbox"/> Doc Edit	<input type="checkbox"/> Doc Delete	<input type="checkbox"/> Doc Hold	<input type="checkbox"/> Doc Finalize	<input type="checkbox"/> Doc Check Out	<input type="checkbox"/> Doc Export/Email	<input type="checkbox"/> Retention	<input type="checkbox"/> Workflow/Onboard	<input type="checkbox"/> Mail Merge
	<input type="checkbox"/> Admin Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
	<input type="checkbox"/> Class Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
	<input type="checkbox"/> Trial User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					

1. Under the Actions column, click the Delete button next to the group. Deleting a group will not delete the users within the group.
2. Click Yes to confirm.