

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

☒ Document Management

☒ Doc View ☒ Doc Add ☒ Doc Edit
☒ Doc Delete ☒ Doc Hold ☒ Finalize Doc
☒ Doc Check Out ☒ Doc Export/Email ☒ Retention
☒ Workflow/Onboard ☒ Mail Merge ☒ MM Template
☒ Release Check-Out ☒ Release Hold ☒ Recover

☒ Structure Management

☒ Doc Type Add ☒ Doc Type Edit ☒ Doc Type Delete
☒ Cabinet Add ☒ Cabinet Edit ☒ Cabinet Delete
☒ Manage Folder ☒ LMS ☒ HTML Forms

☐ Security Management

☐ Group ☐ User ☐ Audit Log
☐ Reports ☐ Distribution/Temp/Prox
















☐ CM Management

☐ CM Read ☐ CM Edit ☐ CM Delete
☐ 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 Fileroom

Fileroom ⓘ	<-- Select Fileroom --> ⓘ	User ⓘ	<-- Select User --> ⓘ	Group Name ⓘ Search Groups		Search 🔍	Clear 🔄	Add 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 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 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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 Filerooms button next to the group.
2. In the pop-up window, add the filerooms you want the group assigned to.
3. Close the window when finished.

Add Users to Existing Group

Fileroom ⓘ <-- Select Fileroom --> ⓘ		User ⓘ <-- Select User --> ⓘ		Group Name ⓘ Search Groups		Search 🔍		Clear ↺		Add 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 type="checkbox"/> Class Group	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
➡️ 👤 📄 📁 🗑️	<input type="checkbox"/> Trial User	✓	✓	✓	✓	✓	✓	✓	✓	<input 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


Fileroom  <-- Select Fileroom -->		User  <-- Select User -->		Group Name  Search Groups		Search 		Clear 		Add 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 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 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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

Fileroom 


<-- Select Fileroom -->


User 


<-- Select User -->










Group Name 

Search Groups

Search 



















Clear 

Add 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 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 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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

Fileroom  <-- Select Fileroom -->	User  <-- Select User -->	Group Name  <input type="text" value="Search Groups"/>	Search 	Clear 	Add 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 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 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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.