

# 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 ☐ Structure 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

☐ 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 <input type="button" value="v"/>	Group Name <input type="button" value="v"/>	Doc View	Doc Add	Doc Edit	Doc Delete	Doc Hold	Doc Finalize	Doc Check Out	Doc Export/Email	Retention	Workflow/Onboard	Mail Merge
<-- Select Fileroom -->	<-- Select User -->											
<input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Add Group"/>												
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<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 checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input 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 checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input 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 type="checkbox"/>	<input checked="" type="checkbox"/>	<input 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 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, 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	Doc View	Doc Add	Doc Edit	Doc Delete	Doc Hold	Doc Finalize	Doc Check Out	Doc Export/Email	Retention	Workflow/Onboard	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 

Search Groups



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.