

# 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  Structure 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  CM 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 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 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 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

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

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

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.