

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 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 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.