

D. User Group

I. Create New User Group

1. Click the icon  with the login name in right top corner from the top bar from bring up the context menu.
2. From the context menu, select “Settings” > “User and Group” > “User Group”.
3. The User Group window will appear.

User Group						
>	Company	Group Name	Description	Modified Date	Audit log	Folder
						
	TOP	\$Administrators	Administrator Group	2021-01-25 14:36:35		
	TOP	\$System Services	System Service Accounts	2021-01-25 14:36:34		
	TOP	All		2021-01-20 12:59:19		
	TOP	Design	Design	2020-12-30 16:46:46		
	TOP	Director	Director Group	2020-12-30 12:59:25		
	TOP	F&A	Finance & Accounting Department	2021-01-25 14:41:36		
	TOP	Group - FDWSJ		2020-09-14 22:00:01		
	TOP	HR	Human Resources Department	2021-01-25 14:41:35		

4. Fill in the information on the top row.

	Company	Group Name	Description
	TOP	Sample Group	
	TOP	\$Administrators	Administrator Group
	TOP	\$System Services	System Service Accounts
	TOP	All	

Field	Description	Default
Company*	Assign Company for this user group.	
Group Name*	Name of the user group.	
Description	User group description.	
Modified Date	Latest modified date and time of this user group.	
Audit Log*	Able to view the audit log.	
Folder*	Able to access the folder.	
Document Profile*	Able to manage document profile.	
User and Group*	Able to manage user and group	
Recycle Bin*	Able to access recycle bin	
Recycle Bin View All Documents*	Able to view all document deleted by other user in recycle bin	
Purge Recycle Bin File*	Able to purge document in recycle bin.	

Root Folder*	Able to manage root folder.	
Permission Level*	Able to manage permission level.	
Application*	Able to access "Application" folder.	
System*	Able to access "System" folder.	
Administrative*	Able to manage "Administrative" setting.	
Authorization*	Able to manage "Authorization" setting.	
Dashboard Designer*	Able to manage "Dashboard Designer" setting.	

(* would be the necessary column when creating a user group.)

5. Click the add button  on the first column to create a new user group with filled information.

II. Modify Existing User Group

1. Open the User Group window.
2. Click the value which is required to change.
3. After modifying the information. The save button  on the left-hand side will be available.
4. Click save button  to commit changes.

III. Delete User Group

1. Open the User Group window.
2. Select the existing user group which is required to delete.
3. Click the delete icon  on the second column.
4. A confirmation message "Are you sure?" will appear.
5. Click "OK" button to confirm deleting.

IV. Add User Account into User Group

1. Open the User Group window.
2. Looking for a user group which is required to add user.
3. Click the  button on the third column.
4. Member Lists window will appear.
5. Click the top empty column for select user.
6. The "Select user or group" window will appear.
7. Select the user for adding to the selected group.
8. Click the add button  at the first column to add the selected user.

V. Add User Group into User Group

1. Open the User Group window.
2. Looking for a user group which is required to add user.
3. Click the  button on the third column of the selected user group.
4. Member Lists window will appear.
5. Click the top empty column for select user.
6. The “Select user or group” window will appear.
7. Click the “Users” on the left of top to bring up a dropdown list.
8. Select “User Group” to change the list to user group selection.
9. Select the group for adding to the selected group.
10. Click the add button  at the first column to add the selected user group.