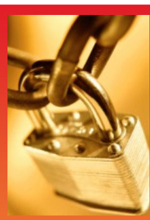
Users, Groups and Permissions Quick Reference



Connecting People, Process Information & Data

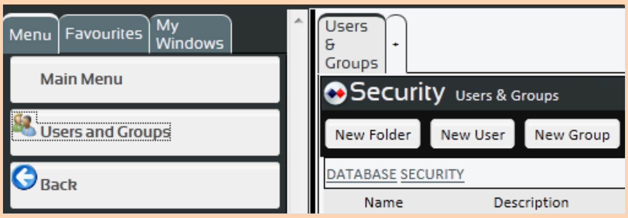
Workflow Connect 4.1
Revision 1.1

Workflow Connect will let you collect your documents and workflows into a single location. We can use users, groups and permissions to share documents only with those people who need to see them.

1 Create Users

With individual user names we can track usage and manage permissions.

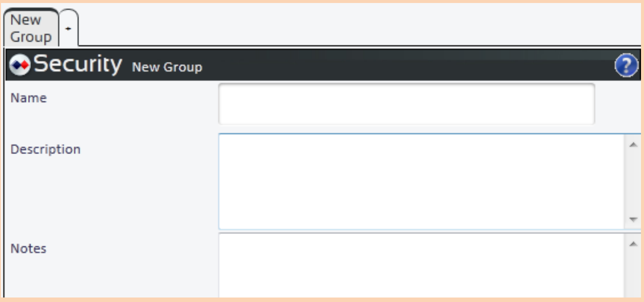
1. *Administration*
2. *Users and Groups*
3. *New User*
4. Choose the type of user that you want
   - *Standard* users can be given permission to modify documents.
   - *Community* users can only view documents.



2 Create groups

We will put users into groups and assign permissions to groups.

1. *Administration*
2. *Users and Groups*
3. *New Group*
4. Enter the *Name* and details for the group. Make the name as descriptive as you can.



3 Add users to groups.

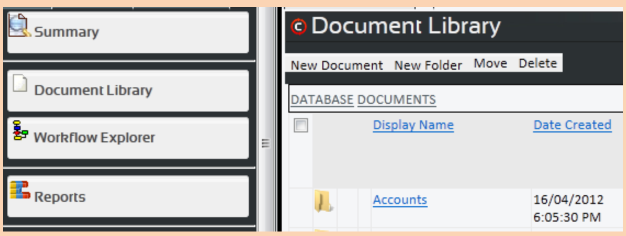
By using groups, changing permissions becomes much easier and simpler.

1. *Administration.*
2. *Users and Groups.*
3. Click on the name of the user that you want to add to the group.
4. *Member of Groups.*
5. *Add Groups.*
6. Type the name of the group that you want to add the user to (as you type the name you will be prompted with a list of groups).
7. You can keep adding more groups.
8. When you have added the user to all the groups you need, click on the *Save* button.

4 Create folders

We will assign permissions to folders and put files into folders.

1. *Document Library.*
2. Browse to the location where you want to create a new folder.
3. Click on *New Folder.*
4. Enter the name of the Folder. Try and make the name as descriptive as possible.



5 Groups permissions to folders

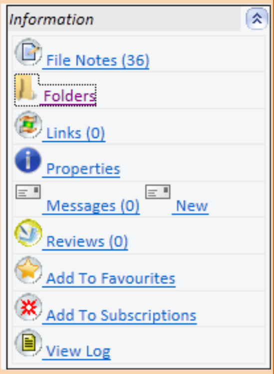
All documents within a folder will have the same permissions as the folder, unless set for that document within the folder.

1. *Document Library*
2. Browse to the folder that you want to set permissions on.
3. Click on the Edit icon.
4. Click on the *Properties* button in the *Information* panel.
5. *Permissions.*
6. Click *Add Group.*
7. Click *OK* for the dialog warning that any individual permission's will be over written.
9. Type the name of the group that you want to give permissions to (as you type the name you will be prompted with a list of groups).
10. Choose the level of permission for that user.
11. Click the *Apply* button.

6 Share using folders

We can make documents appear in more than one folder.

1. *Document Library.*
2. Browse to the document that you want to put in another folder.
3. Click on the document.
4. Click on the *Folders* button in the *Information* pane.
5. Click on *Add Folder.*
6. Browse to the folder you want to add the document to and click on it.

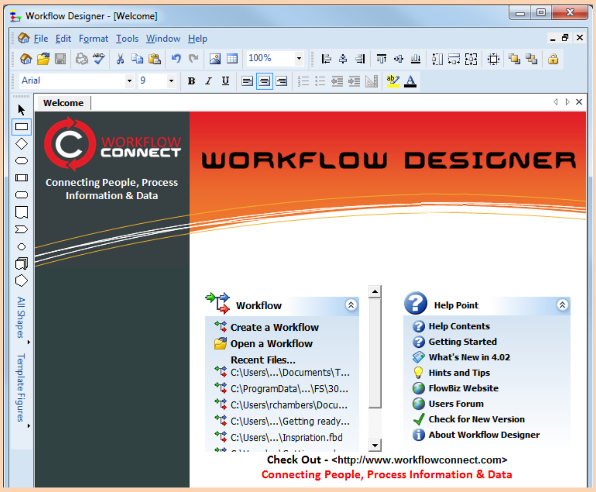


Note: the folder listed as the primary folder will be the one that the document takes its permissions from.

7 Share using workflows

You can also let users find documents using workflows.

Use the free Workflow Designer desktop tool (www.workflowconnect.com/download) to create workflows with documents linked to individual process steps and publish them into Workflow Connect.



8 Individual document permissions

Documents will take their permissions from their primary folder.

The recommended strategy is as follows.

- Create a folder where documents will be stored.
- Give people who are allowed to change documents in that folder editor or administrator permissions to that folder. Groups that have not been granted access to that folder will not be able to access it.
- Put documents into other folders or link to them from workflows.
- Users still won't be able to access the documents so we need to change permissions on specific documents they need to access (remember do this with groups rather than individual users).

Note: We can also just make the folder view only for certain groups, making permission management easier.