




eFileCabinet Online Role-Based Permissions User Guide

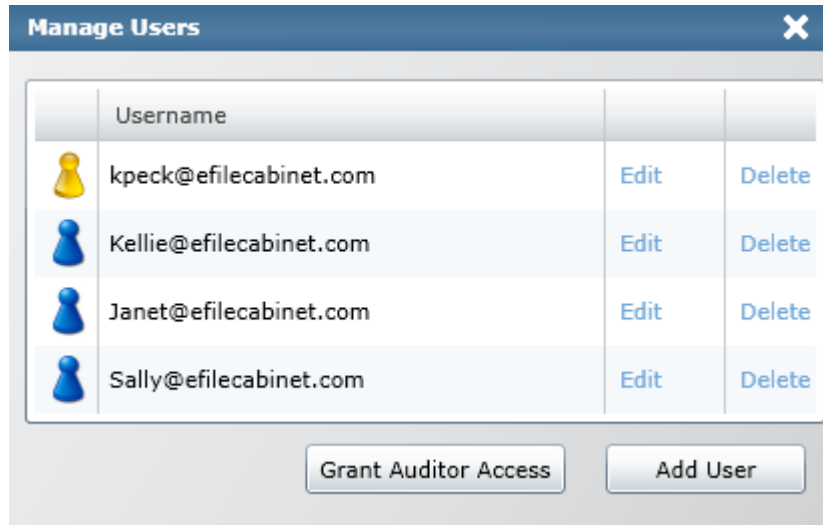
Introduction

Role-Based Permissions allows a standard user to have access to certain functionality that typically would not be included in standard users' granted permissions. For example, a manager may be a standard user in eFileCabinet who needs to have more authority to perform certain actions than a standard user but not as much authority as an administrator. Role-Based Permissions allows you to grant a standard user administrative-like permissions in certain areas, including: granting auditor access, managing retention for documents, and setting up other users.

Step	Action
1	<p>You may either:</p> <ul style="list-style-type: none">a. Set up a new user and apply permissions, orb. apply the permissions to an existing user. <p>To access your users, click on the Users Icon in the Administration Tab.</p>  <p>The screenshot shows a horizontal row of five icons on a light blue background. From left to right: 1. 'Groups' icon: two blue figures. 2. 'Users' icon: a blue figure with a red checkmark. 3. 'Auditor Access' icon: a green figure with a red checkmark. 4. 'User Features' icon: a blue figure with a red checkmark. 5. 'User Sessions' icon: a blue figure with a red checkmark. Below the icons is the text 'Users and Groups'.</p>

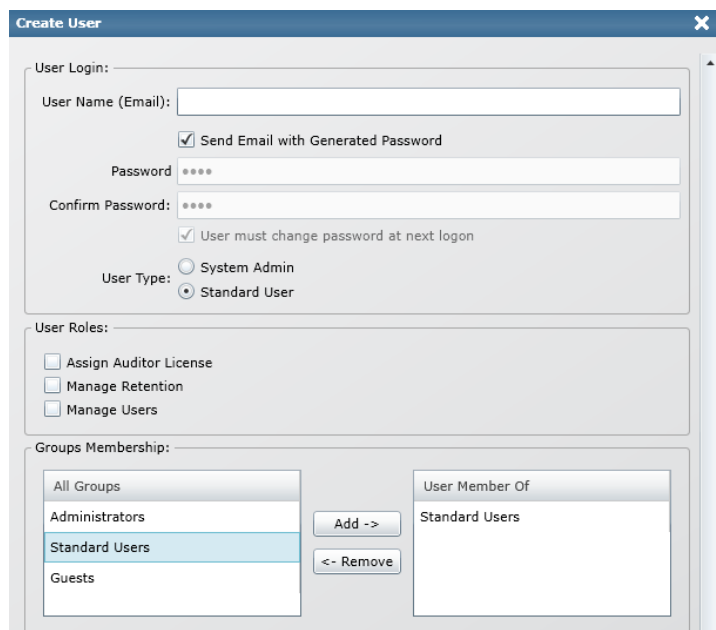
2

To add a new user, click the **Add User** button. To grant access to an existing user, click **Edit** next to the person's email address.



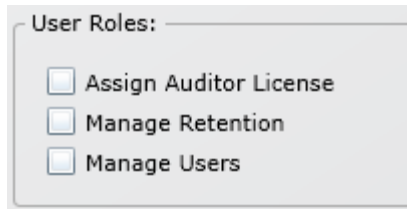
3

Fill in the information for your user. Be sure to select **Standard User** for the **User Type** and assign them to the **Standard Users Group** or any other applicable **Group** for your organization.



4

The **Role-Based Permissions** items are located under **User Roles**.



Assign Auditor License

This role is used to give someone 'view only' access to your data so they can perform an audit of your files. This is a separate license from your regular user licenses. If you do not have one and are interested in this functionality, please contact an eFileCabinet sales representative at 877-574-5505.

Manage Retention

This gives your user the ability to manage retention for any cabinets, drawers, folders, or files that he/she has access to. The retention access will be available to them the same way it would be available to any administrator. (For more information on Retention, see the [eFileCabinet Online User Guide](#).)

Manage Users

This allows your user to create and edit any user in the system. They can assign permissions, add other users to groups, update personal information, and reset passwords.