

Group and User Permissions

Account management techniques allow an Administrator to control the levels of document access and permissions granted to individual Users and Groups (of users) working within iSynergy.

Assigning individual users as members of group account(s) is an effective way to ease account administration overhead. Each user assigned to a group account inherits the permissions granted to the group.

For example, a user assigned group permissions can have additional permissions assigned individually to his user account.

When working with a dynamic information database, it is necessary to institute security measures of varying levels among Users within the system to ensure its integrity.

Within iSynergy, it is possible to deny a User or Group access to an Application(s) or to limit functionality while within an Application. Various Users may be granted access to Applications pertinent to their duties while being refused access to Applications outside the scope of their duties.

Additionally, it is possible to grant a User or Group access to an Application while limiting access to particular Document types or Document statuses within the Application. Similarly, Index-Level permission controls can be placed on sensitive Index fields to control (i.e., prevent or enable) visibility or edit capabilities for selected users.

By combining Application-level, Document-level and Index-level security approaches, it is possible to create a highly granular mode of access control in iSynergy.

User Account Management

At the most basic level, a User account grants an individual Authentication and Entry privileges into iSynergy. Permissions assigned to a User account determine the access and functionality an individual has at his/her fingertips when logged into iSynergy.

The basic configuration attributes of a User account include:

- User name
- Full Name
- Email Address
- Cost
- Account password



User Details	
Username	<input type="text" value="Katie Grace"/>
Full Name	<input type="text" value="Katie Grace"/>
Email Address	<input type="text" value="katiegrace@idatix.com"/>
Cost	<input type="text"/>
Password	<input type="password"/>
Confirm Password	<input type="password"/>

Group accounts in iSynergy lessen the task load of the system administrator. The administrator can set permissions within Group accounts and subsequently assign User accounts membership in various Groups.

Available Users		Group Members
Amy McClain ESpeed System Katie Grace	Add Remove Add All Remove All	Gracie Abby Doe

Update Delete Cancel

Note: This is a more effective approach than assigning permissions for each User account on an individual basis.

Group Account examples include:

- Groups based on department membership (Sales, HR, Customer Service).
- Groups based on job scope and responsibility (scanner operators, data entry personnel, analysts, supervisors, etc.).
- Basic groups of users with limited permissions for identified types of duties and responsibilities.
- System Administrators group with full permissions.

Note: The rights and permissions granted to User accounts based on multiple memberships are cumulative.

Creating a New Group

To add a new Group to the iSynergy system, follow the below steps:

1. On the iSynergy Menu bar, navigate to **Admin>Group Configuration**.



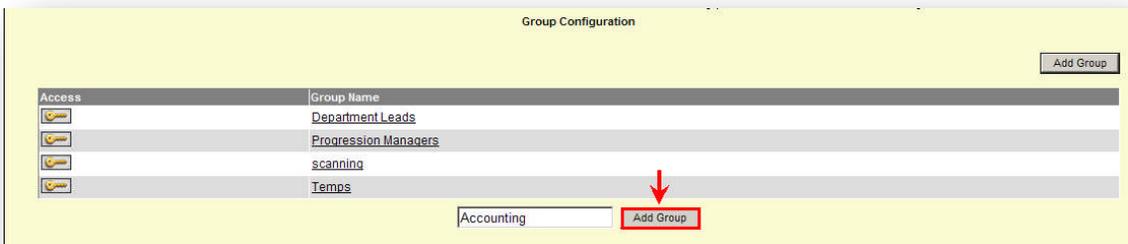
Note: The Group Configuration dialog window displays.

2. Select **Add Group**.

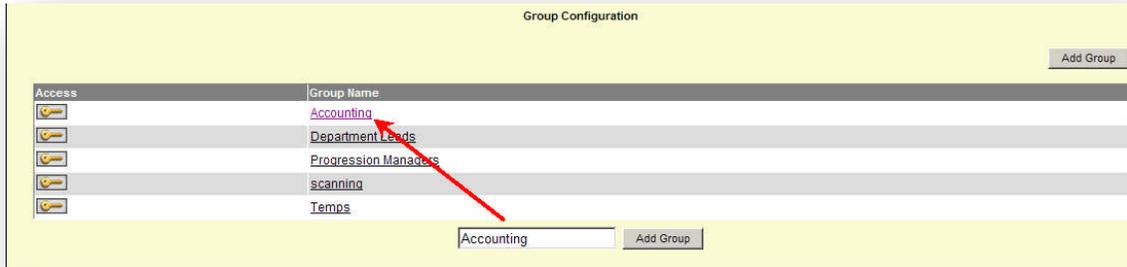


Note: A new text box displays under the existing iSynergy Groups.

3. Enter the **New Group Name**.
4. Select **Add Group**.



5. The newly created Group displays in the Group Configuration table.



Modify Group Permissions

To add or modify permissions of a Group account, follow these steps:

1. On the iSynergy Menu bar, select **Admin>Group Configuration**.
2. Select the Group **Access Key**.



Note: The Application Permission dialog window displays.

3. Select individual checkboxes to grant specific permissions.

Note: If you want to give all permissions, choose Select All Permissions and click Update.

4. Navigate to **Application Permissions**.
5. Select the appropriate **Application(s)** the User Group need permission to access.



Application Permissions		
Application	Search	Doc Security
Checks	<input type="checkbox"/>	ALL
Christmas	<input type="checkbox"/>	ALL
GeneralCapture	<input type="checkbox"/>	ALL
Healthcare Claims	<input type="checkbox"/>	ALL
HR	<input type="checkbox"/>	ALL
HR_Employee Vacations	<input type="checkbox"/>	ALL
Invoices	<input type="checkbox"/>	ALL
Mortgage Files	<input type="checkbox"/>	ALL
Office Manager	<input type="checkbox"/>	ALL
Patient Records	<input type="checkbox"/>	ALL
Payroll	<input type="checkbox"/>	ALL
PO	<input type="checkbox"/>	ALL
Sales Orders	<input type="checkbox"/>	ALL
Samples	<input type="checkbox"/>	ALL
Scan_Test	<input type="checkbox"/>	ALL
ScanDox	<input type="checkbox"/>	ALL
Signature Cards	<input type="checkbox"/>	ALL
Single Task	<input type="checkbox"/>	ALL
Statements	<input type="checkbox"/>	ALL
Tech Writer	<input type="checkbox"/>	ALL

Select All

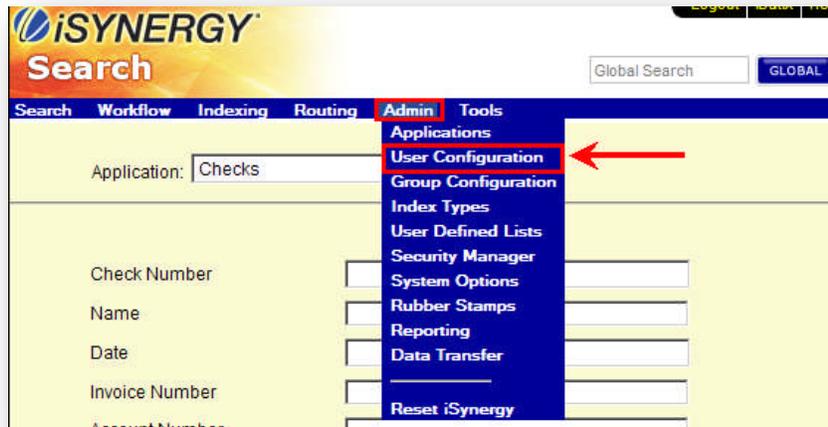
6. Select **Update**.



Creating a New User Account

To add a new iSynergy User, follow these steps:

1. On the iSynergy Menu bar, select **Admin>User Configuration**.



Note: The User Configuration dialog displays.



2. Click **Add User**.



Note: This User Details dialog displays.



3. Tab to the **Username** field and define the Username.



4. Tab to the **Full Name** text field and enter the Users full name.



5. Tab to the **Email Address** text field and enter the Email Address.



6. Tab to the cost and **define the hourly cost**.



The screenshot shows the 'iSYNERGY Admin' interface. At the top, there is a navigation bar with tabs for 'Search', 'Workflow', 'Indexing', 'Routing', 'Admin', and 'Tools'. Below this is a 'User Details' section with a red box around the title. The form contains five input fields: 'Username', 'Full Name', 'Email Address', 'Cost', and 'Password'. A red arrow points to the 'Cost' field.

Note: This cost field is an optional field; however, if you are using the iDatix Business Automation Product, Progression, this cost field will be helpful for production reports to compute task costs by tracking the amount of hours an employee spends on specific tasks.

7. Tab to the Password text field and **define the Users' password**.



The screenshot shows the 'iSYNERGY Admin' interface. At the top, there is a navigation bar with tabs for 'Search', 'Workflow', 'Indexing', 'Routing', 'Admin', and 'Tools'. Below this is a 'User Details' section with a red box around the title. The form contains five input fields: 'Username', 'Full Name', 'Email Address', 'Cost', and 'Password'. A red arrow points to the 'Password' field.

8. Tab to the Confirm Password text field and **Renter the Password** as defined in Step 7.

Note: Passwords are case sensitive! Passwords must be unique, and cannot be the same as the username.



The screenshot shows the 'iSYNERGY Admin' interface. At the top, there is a navigation bar with tabs for 'Search', 'Workflow', 'Indexing', 'Routing', 'Admin', and 'Tools'. Below this is a 'User Details' section with a red box around the title. The form contains six input fields: 'Username', 'Full Name', 'Email Address', 'Cost', 'Password', and 'Confirm Password'. A red arrow points to the 'Confirm Password' field.

9. Click the **Add** button to add the new User and his/her details.



The screenshot shows the 'iSYNERGY Admin' interface. At the top, there is a navigation bar with 'Search', 'Workflow', 'Indexing', 'Routing', 'Admin', and 'Tools'. Below this, a 'User Details' form is displayed. The form contains several input fields: 'Username', 'Full Name', 'Email Address', 'Cost', 'Password', and 'Confirm Password'. At the bottom of the form, there are two buttons: 'Add' and 'Cancel'. A red arrow points to the 'Add' button.

Note: Select cancel if you do not wish to add the User details.

10. The User Configuration dialog displays and the user has now been added to iSynergy.

Adding a User to a Group

To add a User to a Group, follow these steps:

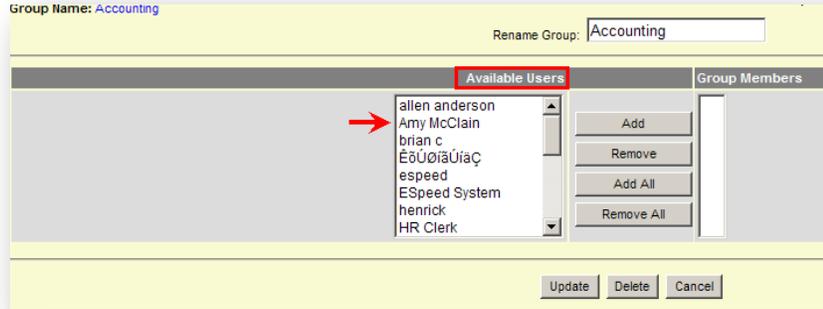
1. On the iSynergy Menu bar, navigate to **Admin>Group Configuration**
2. Select the **Group Name**.



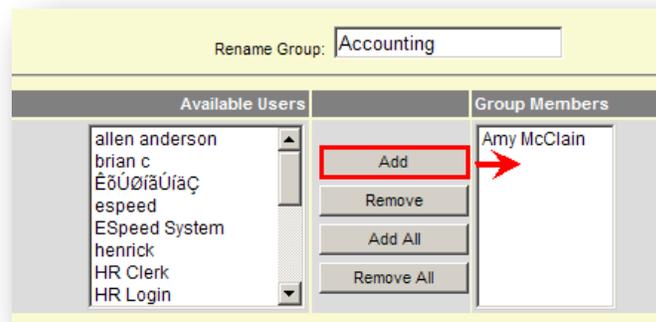
The screenshot shows the 'iSYNERGY Admin' interface with the 'Group Configuration' dialog box open. The dialog has a table with two columns: 'Access' and 'Group Name'. The 'Group Name' column contains the following entries: 'Accounting', 'Department Leads', 'Progression Managers', 'Scanning', and 'Times'. A red arrow points to the 'Accounting' entry in the 'Group Name' column. There is an 'Add Group' button in the top right corner of the dialog.

Note: The Group Name dialog window displays.

3. Select an **Available User**.

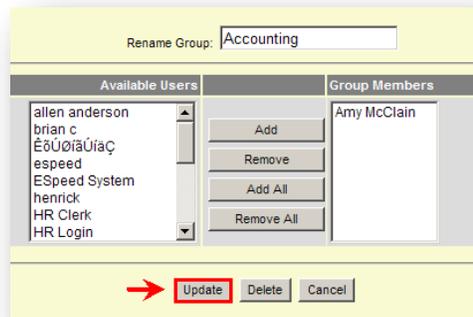


4. Select **Add**.



Note: To make multiple selections, use the Shift or Ctrl keys on your keyboard as appropriate.

3. Click **Update**.

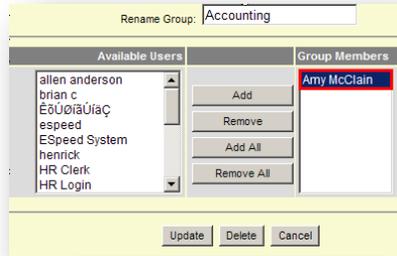


To check the Group membership status of a User, navigate to Admin>User Configuration page; the group membership displays in the Member of Groups column.

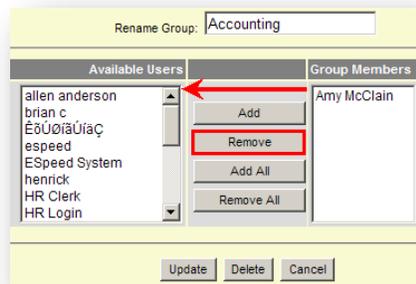
Removing a User from a Group

To remove a User from a Group, follow these steps:

1. On the iSynergy menu bar, navigate to **Admin>Group Configuration**.
2. **Select the Group** that contains the User you want to remove.
3. Select the **User** you want to remove in the Group Members' column.

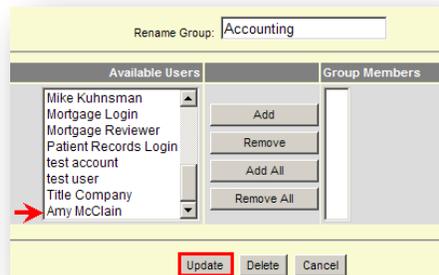


4. Select **Remove**.



Note: The removed user is re-added to the Available Users.

5. Select **Update**.



6. The selected user is removed from the Group.

Note: To verify a User's removal from a Group, load the User Configuration page to confirm the User is no longer included within the Group by viewing the 'Member of Groups' column.

Delete a User Account

To delete a User account, follow these steps:

1. On the iSynergy Menu bar, navigate to **Admin>User Configuration**.
2. Locate the user you want to Delete.
3. Select the desired Username.



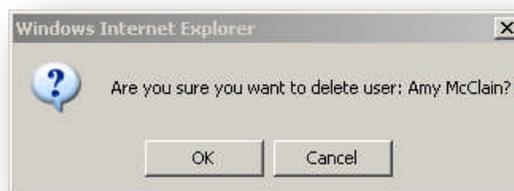
Note: The User Details dialog displays.

3. Select **Delete**.



Note: A Windows Internet Explorer dialog window displays with the selected user name.

4. Select **OK**.



Permission Management

Permissions granted to individual users or groups can be limited in nature or broad in scope depending on the various roles and the granted rights of the User/Group.

For example, it may prove prudent to limit permissions granted to data entry personnel. They may need access to only one Application for data entry purposes. Whereas, Supervisors and Managers may be granted permissions allowing them to assign users to Group memberships that permit actions such as adding Applications and creating new UDLs.

iSynergy permissions are defined initially at the System Level, followed immediately by the Application level.

User Name: Amy McClain **Full Name:** Amy McClain

User Permissions

Login Expiration: Reset Password Next Login

System Level Permissions Select All

<input checked="" type="checkbox"/> Application Add	<input checked="" type="checkbox"/> Application Delete	<input checked="" type="checkbox"/> User Add
<input checked="" type="checkbox"/> User Update	<input checked="" type="checkbox"/> User Delete	<input checked="" type="checkbox"/> Index Type Add
<input checked="" type="checkbox"/> Index Type Update	<input checked="" type="checkbox"/> Index Type Delete	<input checked="" type="checkbox"/> User List Add
<input checked="" type="checkbox"/> User List Update	<input checked="" type="checkbox"/> User List Delete	<input checked="" type="checkbox"/> System Options Update
<input checked="" type="checkbox"/> User Group Add	<input checked="" type="checkbox"/> User Group Update	<input checked="" type="checkbox"/> User Group Delete
<input checked="" type="checkbox"/> Pre Sort Application	<input checked="" type="checkbox"/> System Reporting	<input checked="" type="checkbox"/> Remove Session
<input type="checkbox"/> ScanDox	<input checked="" type="checkbox"/> Work Item List	<input checked="" type="checkbox"/> Progression Studio
<input checked="" type="checkbox"/> Reassign Tasks	<input checked="" type="checkbox"/> Reassign Any Task	<input checked="" type="checkbox"/> Priority Edit
<input checked="" type="checkbox"/> Search Any User Checkout	<input checked="" type="checkbox"/> Search All Applications Checkout	

User group assignments:

- Temps
- Accounting [View](#)

Application Permissions Multi-App Configuration Select All

Application Name	Document Level Permissions	Configuration
<input checked="" type="checkbox"/> Checks	ALL	
<input checked="" type="checkbox"/> GeneralCapture	ALL	
<input checked="" type="checkbox"/> Healthcare Claims	ALL	
<input checked="" type="checkbox"/> HR	ALL	
<input checked="" type="checkbox"/> HR_Employee Vacations	ALL	

System Level Permissions

iSynergy provides the ability to define system level role assignments to grant access to global tasks and permissions that apply to the iSynergy system as a whole.

Each user and/or group who requires access to iSynergy should have a system level role assignment. System Level Permissions can be thought of as defined rules that apply to the entire physical filing cabinet; these permissions provide access to open specific cabinets and files within iSynergy.

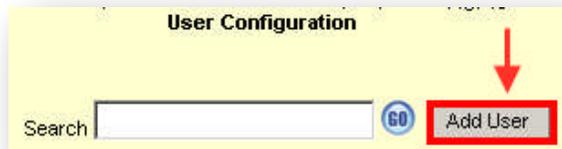
To define a User or Group's System Level Permissions, follow the procedure below:

1. From the iSynergy Menu bar, navigate to **Admin>User Configuration**.



Note: The User Configuration dialog displays.

2. Select **Add User**.



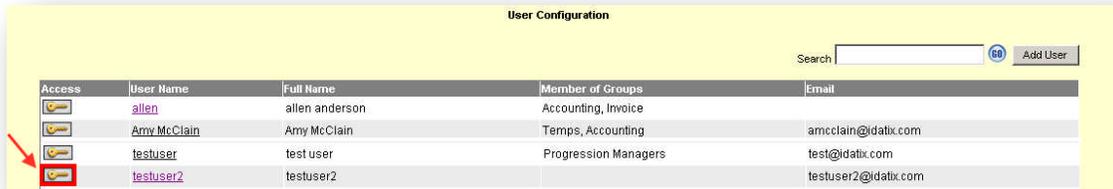
3. Define the new **User Details**.

The image shows the 'User Details' form. The title 'User Details' is highlighted with a red box. A red arrow points to the form fields. The fields are: Username (testuser2), Full Name (testuser2), Email Address (testuser2@idatix.com), Cost (20,0000), Password, and Confirm Password. At the bottom, there are 'Update', 'Delete', and 'Cancel' buttons.

4. Select **Update**.

Note: The user returns to the User Configuration screen.

5. Navigate to and select the appropriate users **Access Key**.



Note: The User Permissions dialog displays for the selected user. When a user is initially created, System Level Permissions are not selected and only the currently created iSynergy Applications are displayed at the Application Level.

6. Navigate to **System Level Permissions**.

Note: Each System Level Permission has been defined in the below table.

System Level Permissions			Select All
<input type="checkbox"/> Application Add	<input type="checkbox"/> Application Delete	<input type="checkbox"/> User Add	
<input type="checkbox"/> User Update	<input type="checkbox"/> User Delete	<input type="checkbox"/> Index Type Add	
<input type="checkbox"/> Index Type Update	<input type="checkbox"/> Index Type Delete	<input type="checkbox"/> User List Add	
<input type="checkbox"/> User List Update	<input type="checkbox"/> User List Delete	<input type="checkbox"/> System Options Update	
<input type="checkbox"/> User Group Add	<input type="checkbox"/> User Group Update	<input type="checkbox"/> User Group Delete	
<input type="checkbox"/> Pre Sort Application	<input type="checkbox"/> Pre Sort Person	<input type="checkbox"/> InBox	
<input type="checkbox"/> System Reporting	<input type="checkbox"/> Remove Session	<input type="checkbox"/> ScanDox	
<input type="checkbox"/> Search Any User Checkout	<input type="checkbox"/> Search All Applications Checkout	<input type="checkbox"/> Hide iLink Update Prompt	
<input type="checkbox"/> Work Item List	<input type="checkbox"/> Progression Studio	<input type="checkbox"/> Reassign Tasks	
<input type="checkbox"/> Reassign Any Task	<input type="checkbox"/> Priority Edit	<input type="checkbox"/> Perform iLink Index Update	

Element	Description
Application Add	Provides the ability to add an iSynergy Application. <i>Note: This permission enables the Applications Admin Menu item, as well as enables the Add New Application button the Application Configuration dialog.</i>
Application Delete	Provides the ability to delete an iSynergy Application. <i>Note: This permission enables the Application Admin menu, as well as enables the Delete button on the Edit Application dialog.</i>

Element	Description
User Add	<p>Provides the ability to create a new iSynergy user account.</p> <p><i>Note: This permission works in conjunction with the User Update permission. You must have both permissions selected in order to create a new user.</i></p>
User Update	<p>Provides the ability to update a user account, as well as update all System Level Permissions of another user..</p> <p><i>Note: In order to add a user to iSynergy, you must have both the User Add and User Update permission. Additionally, in order to delete a user from iSynergy, at the System Level you must have both the User Update and User Delete permission selected.</i></p>
User Delete	<p>Provides the ability to delete an existing user account.</p> <p><i>Note: This permission words in conjunction with the User Update permission. You must have both permissions selected in order to delete a user.</i></p>
Index Type Add	<p>Provides the ability to add an index type.</p> <p><i>Note: This permission works in conjunction with the Index Type Update permission. You must have both permissions selected in order to add and update an index type.</i></p>
Index Type Update	<p>Provides the ability to update an index type.</p> <p><i>Note: In order to update an index type, you must have both the Index Type Add and Index Type Update. Additionally, in order to delete an index type from iSynergy, at the System Level you must have both the Index Type Update and Index Type Delete permission selected.</i></p>
Index Type Delete	<p>Provides the ability to delete an index type.</p> <p><i>Note: This permission works in conjunction with the Index Type Update permission. You must have both permission selected in order to delete an index type.</i></p>

Element	Description
User List Add	<p>Provides the ability to create a UDL.</p> <p><i>Note: This permission works in conjunction with the User List Update permission. You must have both permissions to add an iSynergy UDL.</i></p>
User List Update	<p>Provides the ability to modify a previously created UDL.</p> <p><i>Note: In order to update a UDL, you must both the User List Add and the User List Update permission. Additionally, in order to delete a UDL in iSynergy, at the System Level you must have both the User List Update and User List Delete permission.</i></p>
User List Delete	<p>Provides the ability to delete a UDL.</p> <p><i>Note: This permission works in conjunction with the User List Update permission. You must have both permissions selected to delete an iSynergy UDL.</i></p>
System Options Update	<p>Provides the ability to update the system configuration options. This option also allows users to modify settings within the Scadox profile configuration.</p> <p><i>Note: To modify the iSynergy System Options, navigate to Admin>System Configuration>System Options.</i></p>
User Group Add	<p>Provides the ability to create a new user group.</p> <p><i>Note: This permission works in conjunction with User Group update. You must have both permissions selected to add an iSynergy User Group.</i></p>
User Group Update	<p>Provides the ability to update a user group.</p> <p><i>Note; In order to update an iSynergy User Group, you must have both the User Group Add and the User Group update permission. Additionally, to delete a User group, you must have both the User Group and User Group Delete permission selected.</i></p>

Element	Description
User Group Delete	<p>Provides the ability to delete a user group.</p> <p><i>Note: This permission works in conjunction with the User Group Update permission. You must have both permissions selected to delete an iSynergy User Group.</i></p>
Pre Sort Application	<p>Provides the ability for a user to access to the General Capture page and therefore whether or not the presort general capture option shows up in the menu.</p>
Pre Sort Person	<p>Determines if a user may route to an inbox from General Capture. The drop down allowing a user to select a user's inbox to route to is not present on the general capture page if the user does not have the System Level Permission to Pre Sort Application.</p>
Inbox	<p>Provides the ability to access an inbox for a specified user. Documents that are placed in an iSynergy user's inbox are available to be routed to either another iSynergy Application or another User or Group.</p> <p><i>Note: When a document has been sent to your inbox, you will not be able to see the index fields and therefore you are unable to update them. Any document that is placed in a users inbox must first go through manual indexing before it is submitted to an application. Additionally, selecting the Inbox permission provides the ability to access the Routing option on the iSynergy Menu.</i></p>
System Reporting	<p>Provides the ability to generate iSynergy reports.</p> <p><i>Note: This permission provides the ability to access Admin>Reporting. Additionally, reporting permissions are restricted to the Application Level. The document level security and security permissions are not enforced with this permission.</i></p>
Remove Session	<p>Provides the ability to remove other logged in accounts from active iSynergy session.</p>
ScanDox	<p>Provides the ability to install the iDatix capture software product ScanDox.</p> <p><i>Note: This permission provides the ability to install ScanDox as a clickonce application. Navigate to the iSynergy Tool Bar and select Tools>Scandox.</i></p>

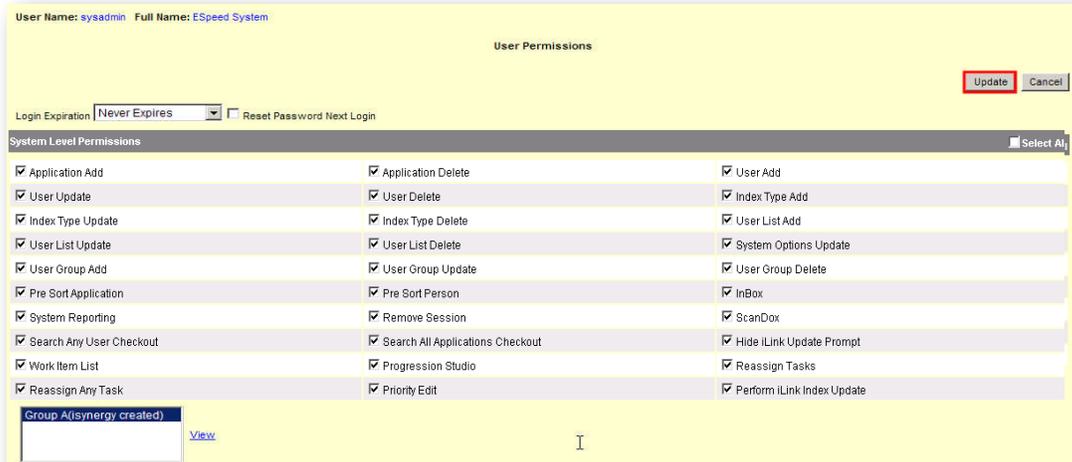
Element	Description
Search Any User Checkout	Provides the ability for a user to search checked out documents by other users via a drop down on the Search page. Note: When this permission is selected, all users are displayed in the drop down, plus an All option.
Search All Applications Checkout	Provides the ability to search for a checked out document across all applications. Note: On the Search page for the Application drop down, when enabled there will be an All option. Selecting this option will display a search screen to allow the user to find a document check out across all applications.
Hide iLink Update Prompt	TBD
Work Item List	Provides the ability to view the Progression work items.
Progression Studio	Provides the ability to access the Progression click once deployment option from the Tools Menu.
Reassign Tasks	Provides the ability to reassign a Progression task that has been assigned to the logged in users account.
Reassign Any Task	Provides the ability to reassign any Progression task that is assigned to any user or group.
Priority Edit	Provides the ability to change priorities on workflow documents.
Perform iLink Index Update	TBD

7. Define the appropriate user System Level Permissions.
8. Select **Update**.

Application Permissions

Once System Level Permissions are defined, you may define the Application Permissions. Application level permissions provide the ability to control the user permissions on a per application basis, as well as enhance security access to the application.

After you have defined the user or group system level and application permission, selecting update enables the application configuration dialog.



iSynergy provides the ability to define single application permissions or multi-application level permissions.

Application Permissions		Multi-App Configuration		Select All
Application Name	Document Level Permissions	ILS Configuration	Configuration	
<input checked="" type="checkbox"/> Bank Customer Files	ALL			
<input checked="" type="checkbox"/> Checks	ALL			
<input checked="" type="checkbox"/> Credit Union Member Files	ALL			
<input type="checkbox"/> GeneralCapture	ALL			
<input checked="" type="checkbox"/> Healthcare Claims				
<input checked="" type="checkbox"/> HR				
<input checked="" type="checkbox"/> Invoices	ALL			

Annotations in the image:
 - A red box highlights the 'Multi-App Configuration' header.
 - A red arrow points from the text 'Single Application Permission' to the gear icon in the 'Configuration' column for 'Bank Customer Files'.
 - A red arrow points from the text 'ILS Configuration for the HR Application via this link' to the gear icon in the 'Configuration' column for 'HR'.

Application level security is achieved by granting or restricting Application permissions. Application level permissions can be assigned to both User and Group accounts.

If the account has permission to search an Application, the Application is available from the Application Selector drop-down menu in the Search Page. If the Application has been restricted, the User/Group will not be aware that the Application even exists, as it will not be visible in the Application Selector drop-down menu.

Element	Description
Application Names	Provides a complete listing of all applications that are defined in iSynergy.
Doc Level Permission	Provides the ability to define security at the document level. <i>Note: Document Level Security is selectively defined for each Application. Navigate to Admin>Applications. Select the appropriate application and choose enabled document level security when appropriate.</i>
ILS Configuration	Index Level Security (ILS) provides the ability to secure specific Indexes within each application to prevent certain individuals or groups from viewing sensitive information or limiting their access unless they have the required permissions. For example, a sensitive HR Index field or Social Security Number might require permissions before access or use is allowed.
Configuration	Provides the ability to define the application level permissions by Cabinet, System and Account Functionality. Additionally, you may elect to configure multiple applications by selecting Multi-App Configuration.

Cabinet Management Permissions

iSynergy provides complete application security that can be defined at the cabinet, system and account functionality level. Cabinet Management permissions are the permissions for the overall application. In other words, you can think of the cabinet as the drawer you would pull out in a filing cabinet that contains all of the records for that specific application. Cabinet management is the organization of how you are going to file documents in that specific drawer.

When a new Application is implemented in iSynergy, the default access is restricted. The system administrator must explicitly enable access to the new Application by updating account permissions.

Application Permissions Select All		
Application Name	Document Level Permissions	Configuration
<input type="checkbox"/> Checks	ALL	
<input type="checkbox"/> GeneralCapture	ALL	
<input type="checkbox"/> Health Care Claims	ALL	
<input type="checkbox"/> HR		
<input checked="" type="checkbox"/> HR_Employee Vacations	ALL	
<input type="checkbox"/> Invoices	ALL	
<input type="checkbox"/> Mortgage Files	ALL	
<input type="checkbox"/> Office Manager	ALL	

The Administrator must select the Application.

Selecting the appropriate Application configuration icon displays the application level permission for the chosen application. These application level permissions are determined at the following levels:

- Cabinet Management.
- Account Functionality Management.

Permission specifications for a specific user regarding the “Bug Tracker” application are shown in the example below.

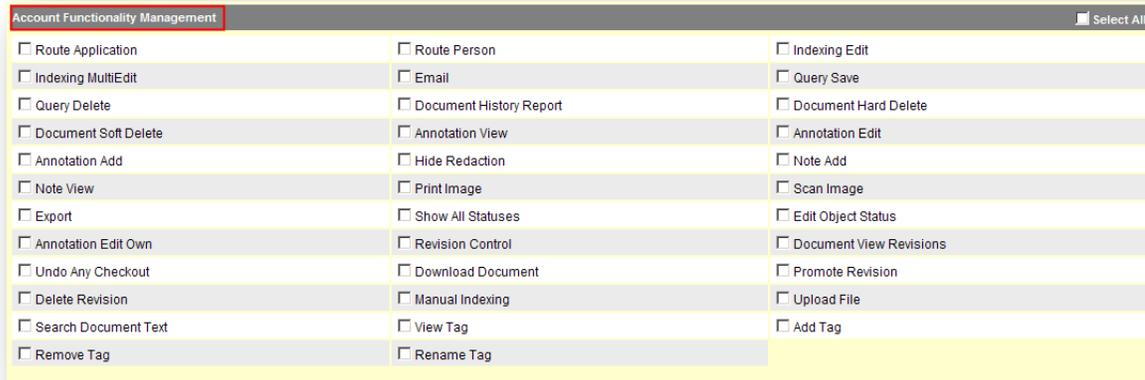
Note: The same approach can also be used to assign these permissions for a specific Group.

Element	Description
Application Update	Provides the ability to update any Application.
Index Add	Provides the ability to add new Index(s) to an Application.
Index Update	Provides the ability to update a specific Index type.
Index Delete	Provides the ability to mark for deletion (no purge) of any index.

Element	Description
Application Management	Provides the ability to manage an application. <i>Note: This permission provides the ability to utilize the Account Functionality Management permissions.</i>

Account Functionality Management Permissions

Account Functionality Management Permissions provide the ability to work within the Application. These permissions are specific for user interaction with the documents stored in each unique iSynergy Application.



Element	Description
Route Application	Determines if a user may route documents out of an application.
Route Person	Determines if a user may route to a user's inbox from this application.
Indexing Edit	Provides the ability to update index values.
Indexing MultiEdit	Provides the ability to edit multiple indexes for multiple selected documents simultaneously.
Email	Provides the ability to send email with object attachments.
Query Save	Provides the ability for the user to save a query.
Query Delete	Provides the ability for the user to delete a saved query.

Element	Description
Document History Report	Provides the ability for system events history to be displayed with the Reporting functionality.
Document Hard Delete	Provides the ability for an object to be purged from system, or true deletion from storage subsystem. Hard delete permission enables the group to view the iSynergy's Object Status field with soft-deleted status (i.e., "X").
Document Soft Delete	Provides the ability for an object to seem to be deleted from iSynergy, but it is flagged (i.e., "X" Object-Status) for purge from the system.
Annotation View	Provides the ability to view any existing Annotations.
Annotation Edit	Provides the ability to create, edit, or delete Annotations. <i>Note: By default, this permission also provides the ability to view the annotation(s) you have created.</i>
Annotation Add	Provides the ability to add, edit, and delete new annotations. <i>Note: By default, this permission also provides the ability to view the annotation(s) you have created.</i>
Hide Redaction	Provides the ability to hide a Redaction when a user selects the Hide Annotations Icon in the Viewer. The user can then see the content underneath redaction annotations.
Note Add	Provides the ability to View and Add new notes. <i>Note: This permission is dependent on Note View.</i>
Note View	Provides the ability to View pre-existing notes. <i>Note: This Permission is necessary to also allow Adding of Notes.</i>
Print Image	Provides the ability to print an image.
Scan Image	This permission is not being used.
Export	Provides the ability to export a Document out of the iSynergy.

Element	Description
Show All Statuses	Provides the ability to display searchable and unsearchable items that normally would not display based on search criteria.
Edit Object Status	Provides the ability to allow a user to change an object status.
Annotation Edit Own	Provides the ability to create, edit or delete annotations that the user created. This does not include annotations created by other users.
Use Native PDF Viewer	Allows the user to view PDF documents within the native viewer. This is typically used when users have full versions of Adobe.
Revision Control	Provides the ability to check in/out documents within the designated application.
Document View Revisions	Provides the ability to review document revisions within a designated application. <i>Note: This permission is dependent upon Revision Control being selected.</i>
Undo Any Checkout	Provides the ability to undo any checked out document.
Download Document	Provides the ability to select the download option and save it to a directory of your choice.
Promote Revision	Provides the ability to make a previous revision the current version of a document.
Delete Revision	Provides the ability to delete revisions from an application.
Manual Indexing	Provides the ability to manually index a document. <i>Note: This permission provides the ability to view the Indexing Menu option on the iSynergy Tool bar.</i>
Upload File	Provides the ability to upload a file while in iSynergy. <i>Note: This permission is located in the Indexing Menu.</i>
View Tag	Provides the ability to view tags associated with a record.

Element	Description
Add Tag	Provides the ability to add tags to one or many documents within a designated application.
Remove Tag	Provides the ability to remove tags from a record as defined by the appropriate tag search.
Rename Tag	Provides the ability to rename tags that are already associated with a record.
Select All Permissions	Checkbox enables all permissions for all items under Cabinet Management, System Management, Account Management, and Account Functionality Management.

User Permissions

To add or modify User account permissions, follow these steps:

1. On the iSynergy Menu bar, navigate to **Admin>User Configuration**.

Note: This User Configuration displays.

2. Navigate to the **Appropriate User**.
3. Click the desired User **Access Key**.

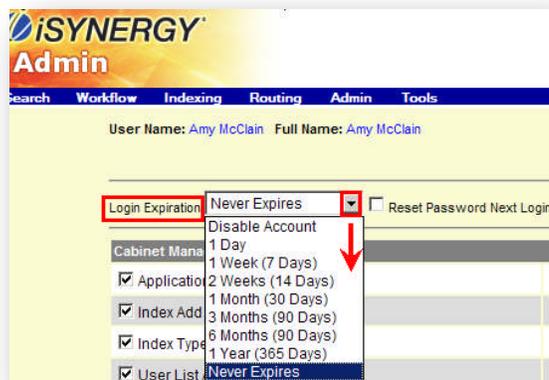


Note: The selected User Permissions dialog displays.

4. Navigate to **Login Expiration**.



5. Select the **Drop-Down** Menu and choose the appropriate option.



Note: If you wish to force the user to define a new password, select Reset Password Next Login.



6. Select the Appropriate System Level Permissions.

System Level Permissions			<input checked="" type="checkbox"/> Select All
<input checked="" type="checkbox"/> Application Add	<input checked="" type="checkbox"/> Application Delete	<input checked="" type="checkbox"/> User Add	
<input checked="" type="checkbox"/> User Update	<input checked="" type="checkbox"/> User Delete	<input checked="" type="checkbox"/> Index Type Add	
<input checked="" type="checkbox"/> Index Type Update	<input checked="" type="checkbox"/> Index Type Delete	<input checked="" type="checkbox"/> User List Add	
<input checked="" type="checkbox"/> User List Update	<input checked="" type="checkbox"/> User List Delete	<input checked="" type="checkbox"/> System Options Update	
<input checked="" type="checkbox"/> User Group Add	<input checked="" type="checkbox"/> User Group Update	<input checked="" type="checkbox"/> User Group Delete	
<input checked="" type="checkbox"/> Pre Sort Application	<input checked="" type="checkbox"/> Pre Sort Person	<input checked="" type="checkbox"/> InBox	
<input checked="" type="checkbox"/> System Reporting	<input checked="" type="checkbox"/> Remove Session	<input checked="" type="checkbox"/> ScanDox	
<input checked="" type="checkbox"/> Search Any User Checkout	<input checked="" type="checkbox"/> Search All Applications Checkout	<input checked="" type="checkbox"/> Work Item List	
<input checked="" type="checkbox"/> Progression Studio	<input checked="" type="checkbox"/> Reassign Tasks	<input checked="" type="checkbox"/> Reassign Any Task	
<input checked="" type="checkbox"/> Priority Edit			

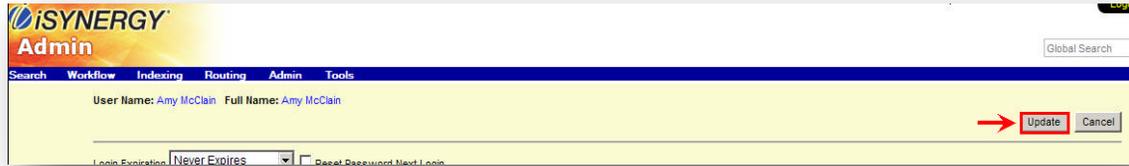
Note: If all permissions in the aforementioned groups are to be given to the user, click Select All.

- Navigate to **Application Permissions** and choose the appropriate **Application**.

Application Permissions		
Application	Search	Doc Secu
Checks	<input checked="" type="checkbox"/>	ALL
Christmas	<input type="checkbox"/>	ALL
GeneralCapture	<input checked="" type="checkbox"/>	ALL
Healthcare Claims	<input checked="" type="checkbox"/>	ALL
HR	<input checked="" type="checkbox"/>	ALL
HR_Employee Vacations	<input checked="" type="checkbox"/>	ALL
Invoices	<input checked="" type="checkbox"/>	ALL
Mortgage Files	<input checked="" type="checkbox"/>	ALL
Office Manager	<input checked="" type="checkbox"/>	ALL
Patient Records	<input checked="" type="checkbox"/>	ALL
Payroll	<input type="checkbox"/>	ALL
PO	<input checked="" type="checkbox"/>	ALL
Sales Orders	<input checked="" type="checkbox"/>	ALL
Samples	<input checked="" type="checkbox"/>	ALL
Scan_Test	<input checked="" type="checkbox"/>	ALL
ScanDox	<input checked="" type="checkbox"/>	ALL
Signature Cards	<input checked="" type="checkbox"/>	ALL
Single Task	<input checked="" type="checkbox"/>	ALL
Statements	<input checked="" type="checkbox"/>	ALL
Tech Writer	<input checked="" type="checkbox"/>	ALL
<input type="checkbox"/> Select All		

Note: If all Applications are required for the user, click Select All.

- Click **Update**.



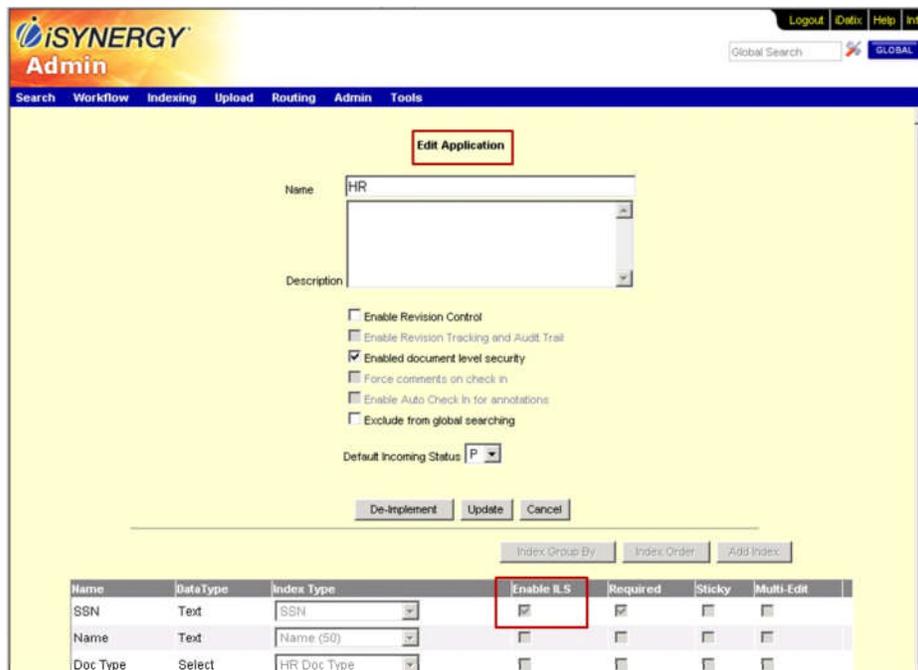
Index Level Security (ILS)

ILS is a permission option that can be configured for Applications, Users and Groups. ILS settings can prevent restricted users or groups from searching, viewing or changing ILS index fields.

For example, certain users or groups may not be permitted to search, view or edit a Social-Security Number or an Employee Salary index field when the user's ILS permissions are restricted from viewing and/or editing.

Defining ILS Security for an Application

The following example shows ILS permissions being configured in the HR Application (Cabinet) for the Social-Security Number (SSN) index field after selecting the HR application definition to Edit.



Since some users or groups that access HR documents are to be prevented from Searching, Viewing or Editing an SSN index field's value, the *Enable ILS* checkbox is checked in the row for the SSN index field of the HR Application cabinet.

Clicking the Update Button activates ILS feature for the SSN Index.

Granting ILS Permissions to Users or Groups

The next step is to select the desired User (Admin > User Configuration) or Group (Admin > Group Configuration) to edit.

- Locate the application permissions for the selected User/Group that is displayed and click on its ILS Configuration icon, shown below:

No group assignments.

Application Permissions		Multi-App Configuration	
Application Name	Document Level Permissions	ILS Configuration	Configuration
<input checked="" type="checkbox"/> Bank Customer Files	ALL		
<input checked="" type="checkbox"/> Checks	ALL		
<input checked="" type="checkbox"/> Credit Union Member Files	ALL		
<input checked="" type="checkbox"/> GeneralCapture	ALL		
<input checked="" type="checkbox"/> Healthcare Claims			
<input checked="" type="checkbox"/> HR			
<input checked="" type="checkbox"/> Invoices	ALL		

- The ILS Configuration for the selected User/Group name and Name of the Application cabinet appears along with a list of ILS-activated Index fields for you to *Restrict* or *Grant* ILS permissions using the checkboxes.

Logout iDatix Help Info

Global Search GLOBAL

Search Workflow Indexing Upload Routing Admin Tools

User Name: mbank Full Name: Mike Bank

HR

Update Cancel

Index Level Permissions		
Index Name	View	Edit
SSN	<input type="checkbox"/>	<input type="checkbox"/>

Click a checkbox to set (checked box) or reset (unchecked box) the permission:

- View Permission – Allows the index (e.g., SSN index) to be viewed and searched
- Edit Permission – Allows the index (e.g., SSN index) to be changed.

Note: the Select All checkbox can be used to set and reset both options with one click.

- After setting the appropriate permission checkboxes for all index fields in the list, click the Update button to apply your ILS permission changes.

Note: ILS permission settings affect All related iDatix products including iSynergy to ensure comprehensive permissions control.