

Tech Tip #41: eDOCSignature Groups

****These settings and features may not be available for all clients. If you do not see them, please contact your solution provider.****

There are two types of groups in eDOCSignature: the first group type determines user permissions (i.e. "permissions groups"). There are two default permissions groups: **Admin** (EDOCSIG_Admin) and **User** (EDOCSIG). You can find these groups listed under the Groups heading on the **Users** tab as seen below.

The screenshot displays the user management interface with the following elements:

- Navigation Tabs:** Users, Groups, Signers, Disclosures, Indices, Tags, Roles, eDOC-It
- Buttons:** Add, Delete, Save
- User Information:**
 - User Name: KARL@QC
 - New Password: Password
 - Confirm Password: Confirm Password
 - Password Expires: 10/22/2019
 - Full Name: Karl QC Test no Permissions
 - Description: Description
 - Email: KarlQC@edoclogic.com
- Groups Section:**
 - EDOCSIG_ADMIN (unchecked)
 - EDOCSIG (checked)**
 - HR_ (unchecked)
- Settings Section:**
 - Locked Out (unchecked)
 - Force Change (unchecked)
- Permissions Section:**
 - Change Settings (unchecked)
 - Send Documents (checked with G icon)**
 - Manage Documents (checked with G icon)**

These groups affect a user's permissions which are denoted by the **G** icon to the left of each permission. In the screenshot above, the user "Karl@QC" is part of the **USER** (EDOCSIG) group; therefore, some of the permissions have a G while others have an empty box. The **User** group grants users a more limited set of permissions while the **ADMIN** group gets *all* permissions.

Sharing Groups

The second group type determines who has access to packages (i.e. "sharing groups"). There is a permission called **View/Edit All Packages** that is only given to users in the **Admin** group. Therefore, any user who only has **User** permissions will *only* have access to view or edit packages they created. This is where "sharing groups" come in.

The screenshot shows a navigation bar with tabs: Users, Groups, Signers, Disclosures, Indices, Tags, Roles, and eDOC. Below the navigation bar are buttons for Add, Delete, and Save. The main content area is titled 'Groups' and contains a form with the following fields:

- Group Name: HR_ (dropdown menu)
- Description: HR (text input)
- Users in Group (list of users with checkboxes):
 - ADMIN
 - ADMIN@QC
 - ADMINISTRATOR
 - [partially visible]

Red arrows indicate the flow of the process: one arrow points from the 'Groups' tab to the 'Group Name' field, and another arrow points from the 'Group Name' field to the 'Users in Group' list.

To the right of the **Users** tab, you will find the **Groups** tab. Here, you can create a new "sharing group" and select specific users to include in that group. This provides staff with a way of sharing access to packages they create without giving the entire credit union access. In the screenshot above, a new "sharing group" called "HR" has been created.

The last step in creating a share group is to navigate back to the **Users** tab. Under the "Groups" heading, you will see all the sharing groups you've created along with the previously mentioned permission groups. As seen in the screenshot below, the *sharing* group "HR" is now included in the list of groups.

Users Groups Signers Disclosures

User Name: KARL@QC

New Password: Password

Confirm Password: Confirm Password

Password Expires: 10/22/2019

Groups

- EDOCSIG_ADMIN_QC
- EDOCSIG_QC
- HR_
- NewGroup

Settings

- Locked Out
- Force Change



If your credit union has **Groups** set up, during the document creation process, there is an option to share the document with either *individual users* or a *group* (so long as you're a member of that group).

You can also set templates to automatically include groups or sharing permissions with specific users as seen below.



Select groups and users to share this document with

Users	Groups
<input type="checkbox"/> ADMIN	<input type="checkbox"/> Administrators
<input type="checkbox"/> ADMIN@QC	<input type="checkbox"/> EDOCSIG_ADMIN_QC
<input type="checkbox"/> ADMINISTRATOR	<input type="checkbox"/> EDOCSIG_QC
<input type="checkbox"/> ANGELA.WEEKES@QC	<input checked="" type="checkbox"/> HR_
<input type="checkbox"/> CHANGEPASSWORD	<input type="checkbox"/> NewGroup

If your credit union does not have access to the **Groups** tab but would like to discuss adding this feature to your setup, reach out to our sales team at sales@edologic.com