

Tech Tip #49: View/Edit All Packages vs. Groups in eDOCSignature

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

When logged into eDOCSignature as an administrator, you will find the **View/Edit All Packages** permission in the **Permissions** list on the **Users** tab.

| Users Group | os Signers | Disclosures | Indices | Tags | Roles | eDOC-lt | |
|-------------------|-------------------|-------------|--------------|-----------------------------|-------------------|---------|--|
| | | | | | Add | Save | |
| User Name: | RSULLIVAN | ~ | Full Name: | Riley Sul | livan | | |
| New Password: | Password | | Description: | Descript | ion | | |
| Confirm Password: | Confirm Pass. ord | | Email: | rsullivanAdmin@edoclogic.cc | | | |
| Password Expires: | 12/09/2020 | | | | | | |
| Group | os | Setti | 26 | ▼ ວຕເ | Permissions | | |
| Administrator | s | Locked Out | | Ma | age Documents | | |
| | MIN_QC | Force Chang | ge | | hage Documents | ² | |
| EDOCSIG_QC | | | | Viev | w/Edit All Packag | jes | |
| | | | | Edit | Users | - | |

This permission allows users to access packages and documents sent by other users. Packages and documents sent by other users can be found by clicking **Manage Packages** on the eDOCSignature home screen. The **Search for Packages** page appears where you can filter your package search by package name, package creator, creation date, etc.:



The **Created By** drop-down list defaults to whomever is logged into eDOCSignature. However, if you are granted the **View/Edit All Packages** permission, you can select a different user from the **Created By** drop-down list. Alternatively, you can select **All** from the drop-down list to see all available packages.

Most credit unions have this permission enabled by default for both admins and users. However, some prefer to keep this option enabled only for admins. If your credit union would like to remove this permission from the default users group, you can request this from our Client Development team who can then make the necessary changes.

The **Groups** tab is also a tab on the settings page:

| Users | Groups | Signers | Disclosures | Indices | ; | Tags | Roles | eD | OC-lt |
|-----------|-------------------------|--------------------------|-------------|---------|---|---|---------|------|-------|
| | | _ | | | | Add | Delete | Save | |
| Gri De | oup Name: scription: | Loans_Team Loans Team | v |] | | Users i ADMIN ADMIN@QI ADMINISTR | n Group | | |

Groups are used by credit unions that do not freely enable the permission **View/Edit All Packages**. The purpose of creating a group is to allow specific staff members to share their sent documents with other members on their team. For example, if you are on the Loans team, you can create a group called Loans and assign other staff members on the team to the group using the **Users in Group** list.

You can create a new group using the **Add** option. Note that in the screenshot above, there is an underscore between **Loans** and **Team** in the group name. This is because you can not have spaces in a group name.

When sending a document out for eSign, after setting up signature elements on a document, you will see the **Sharing** screen shown below:

| () | Sharing for QC Form of QC | 0 | | | |
|--|---|--------|--|--|--|
| Back | | Cancel | | | |
| Select users and groups to share this document with: | Users Groups ADMIN ADMINI@QC ADMINISTRATOR ADMINISTRATOR AMGELA.WEEKES@QC CHANGEPASSWORD Loans,Team | Þ | | | |

Note: If you do not see the Sharing screen during the Send Document process, contact Client Development to enable it.

On this screen, you have two options. On the left is a list of all users at the credit union with whom the document can be shared. On the right is a list of all groups with whom the document can be shared. Selecting a group will automatically include the list of users who were added to that group as described earlier.

Please note – the users with whom you share a document are not notified via email or any other means when a document is sent, updated, or completed. The purpose of sharing is to allow users to search for the document though the **Manage Documents** page.