MANAGING USER ACCESS (ADMIN)

InEight® DOCUMENT

SETTING UP SECURITY GROUPS

1. Click the ⚙ icon and select **Admin**
2. Select **Manage user access** and click the ⊕ **icon**
3. Fill in the details of the new security group
4. Select the default Security Group access level. It can also be managed at a User level if required.

Default user security			
Standard mail:		**Unregistered mail:**	
Personal	▼	None	▼
Folders:		**Documents:**	
None	▼	View	▼
Packages:		**Transmittals:**	
None	▼	Company	▼
Published report:		**Tasks:**	
None	▼	None	▼
Gallery:		**Lots:**	
None	▼	None	▼
Forms:		**Checklist:**	
None	▼	None	▼

5. Click **Save**

NEED SOME MORE HELP?

📖 Learn more in our Knowledge Library
learn.ineight.com

🖱 Take a course at InEight U
university.ineight.com

ADDING USERS TO SECURITY GROUPS

1. Click the ⚙ icon and select **Admin**
2. Select **Manage user access** ▶ select the **security group**
3. In the Access type drop-down menu ▶ select **Users**
4. Click the 👷⁺ icon
5. Select the company of the user ▶ select the user(s)

Available users

Brookman Co. ▼	
☑	**Name**
☑	Andrea Chadwick

6. Click the **arrow icon**
7. Click **Add**
8. Click **Yes** to confirm

DELEGATING ADMINISTRATIVE FUNCTIONS

1. In the Access type drop-down menu ▶ select **Security**
2. In the Module drop-down menu ▶ select the relevant module.
3. You can choose the checkbox under the **Allow** column for each Description
4. Click **Save**

CONTROLLING ACCESS TO MAIL TYPES

1. Click the ⚙ icon and select **Admin**
2. Select **Manage user access** ▶ select the **security group**
3. In the Access type drop-down menu ▶ select **Mail**
4. Choose the settings that will apply to that security group

Mail type ↑	Read	Draft for review	Send	Attach files	Visibility
AA	☑	☐	☐	☑	Company
LET	☑	☑	☑	☑	Company

- **Read:** Allows users to receive the mail
- **Draft for review:** Allows users to draft and send mail for review
- **Send:** Allows users to send the mail
- **Attach files:** Allows users to attach files

Note:

- Under the **Visibility** column you can choose Personal, Department or Company for each mail type
- If no boxes are ticked, the Mail type will not be visible to users in the security group, even if they have Company access to Mail

5. Click **Save**