

Form Permissions

Module 9 – Permissions

Version 1.0

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1. Smarter Drafter Permissions

Smarter Drafter Permissions are used to define user access to **folders**, **documents** and **system functions**.

Users with **Builder Permissions** can assign permissions on forms to control who can see each form in the organisation's form library and therefore who can generate them.

2. Builder Permissions

There are 3 sub-categories of permissions for builders:

1. Forms
2. Section Blocks
3. Application Settings

2.1 Forms

There are three options for granting **Builder** permissions to **Forms**:

1. **No Access**: when selected, the user will not have access to build document automations and the **Forms > Build** option will not be available from the side navigation menu.
2. **All forms & folders**: when selected, the user will have unlimited builder access. This grants them access to all builder functions for all existing and new documents.
3. **Specific folders & forms**: when selected, specific system functions can be enabled at a folder and/or form level.

Note: If your permission settings need updating, contact your account administrator.

2.2 System Functions

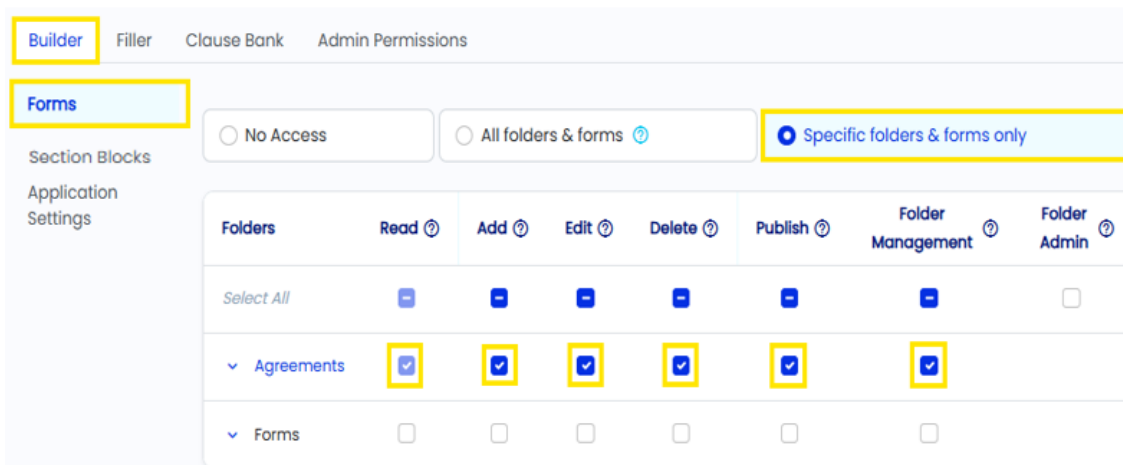
When **Specific folders & forms only** is selected, a table will appear with the following system functions that can be granted at a folder* and/or form level:

- **Read** allows users to view a document in build mode.
- **Add** (folder-level only) - allows users to add new forms to that folder and respective sub-folders.
- **Edit** allows users to edit existing documents.
- **Delete** - allows users to delete existing documents.
- **Publish** - allows users to publish existing documents.

- **Folder Management** (folder-level only) – allows users to edit and delete the folder; and add, edit and delete sub-folders within it. This does not allow users to create new parent folders.
- **Library Admin** – allows users to add, edit and delete *new* parent folders and grants them full control of the forms and sub-folders within them.

Note: Library Admin does not automatically grant users access to *existing* parent folders.

Note: When granting permissions at the folder level, all existing sub-folders and forms within that folder will inherit the selected permissions. When new forms and/or sub-folders are created within that folder, they will also inherit the permissions granted from that folder.



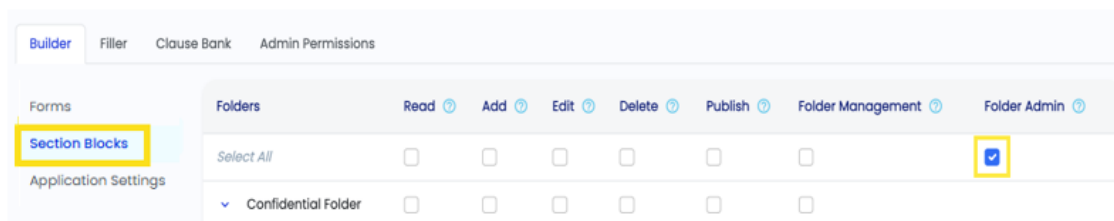
| Folders | Read ? | Add ? | Edit ? | Delete ? | Publish ? | Folder Management ? | Folder Admin ? |
|------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|
| Select All | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Agreements | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Forms | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Note: Save your work as you complete each screen to avoid losing inputs.

2.3 Section Blocks

The same **Builder System functions** mentioned in 2.2 can be set for **Section Blocks**.

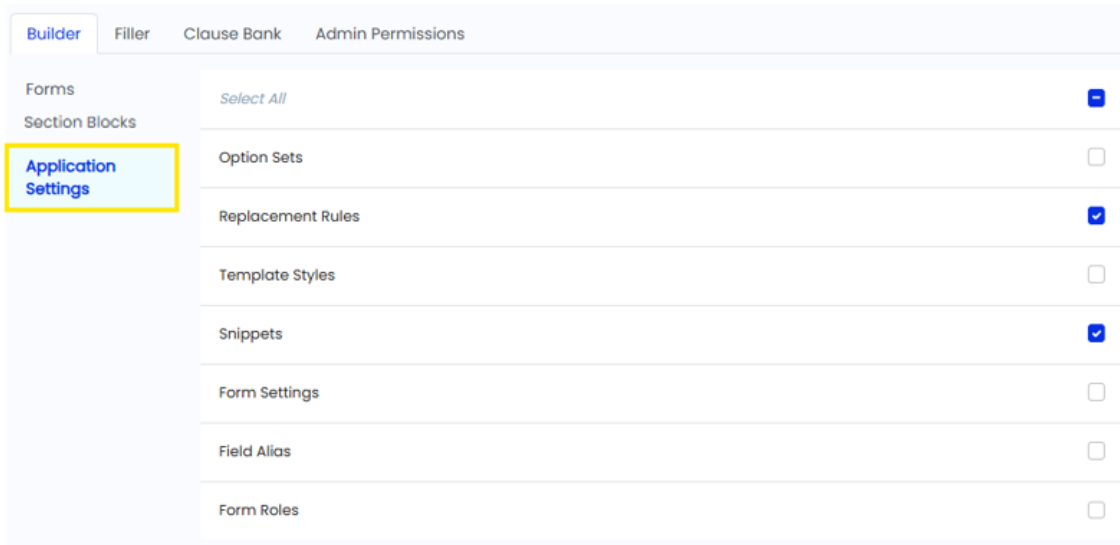
In this example, the user has been granted **Library Admin**, which grants them full control to create *new* Section Blocks folders and forms, however, they do not have access to the *existing* 'Confidential Folder'.



| Folders | Read ? | Add ? | Edit ? | Delete ? | Publish ? | Folder Management ? | Folder Admin ? |
|---------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|
| Select All | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Confidential Folder | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

2.4 Application Settings

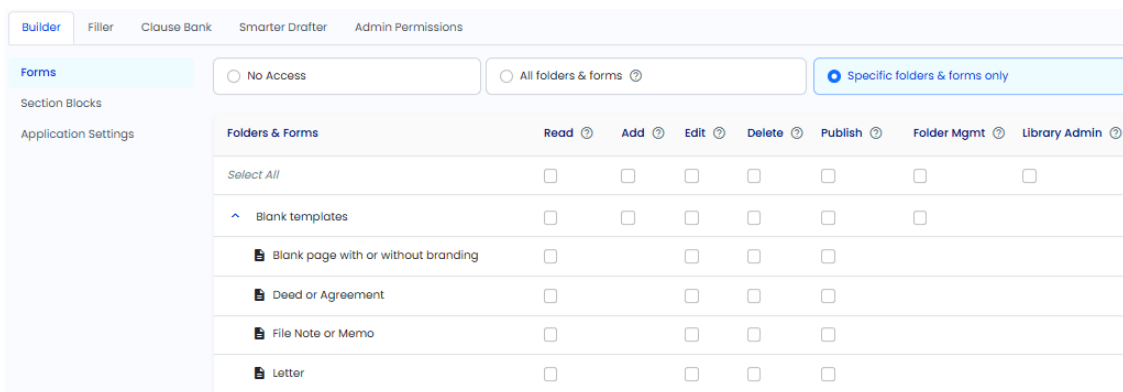
Application Settings under the **Builder** tab displays a list of builder-related functions. These functions are available to Builders with **add** and **edit** access at a *form level*, however, when enabled from here, the user will be able to view and manage these functions at the *application level* e.g. when **Option Sets** is enabled from here, the user can view and manage *all* option sets used throughout *all* forms. In this example, these users will have permission to edit options sets and snippets, but no permission on other features.



| Builder | Filler | Clause Bank | Admin Permissions |
|----------------------|-------------------------------------|-------------------------------------|-------------------|
| Forms | Select All <input type="checkbox"/> | | |
| Section Blocks | | | |
| Application Settings | | | |
| | Option Sets | <input type="checkbox"/> | |
| | Replacement Rules | <input checked="" type="checkbox"/> | |
| | Template Styles | <input type="checkbox"/> | |
| | Snippets | <input checked="" type="checkbox"/> | |
| | Form Settings | <input type="checkbox"/> | |
| | Field Alias | <input type="checkbox"/> | |
| | Form Roles | <input type="checkbox"/> | |

3. Customised Folder and Form Permissions

Adjustments to specific folder and form permissions are handled in each user's permission settings and/or the groups they've been assigned permission to.



| Builder | Filler | Clause Bank | Smarter Drafter | Admin Permissions | | | | |
|----------------------|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Forms | <input type="radio"/> No Access <input type="radio"/> All folders & forms ⓘ <input checked="" type="radio"/> Specific folders & forms only | | | | | | | |
| Section Blocks | | | | | | | | |
| Application Settings | | | | | | | | |
| | Folders & Forms | Read ⓘ | Add ⓘ | Edit ⓘ | Delete ⓘ | Publish ⓘ | Folder Mgmt ⓘ | Library Admin ⓘ |
| | Select All | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Blank templates | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Blank page with or without branding | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | |
| | Deed or Agreement | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | |
| | File Note or Memo | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | |
| | Letter | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | |

Permission sets can be used to create sub-groups to only give permission to specific people, a set practice area etc.

Note: If a folder or form requires custom permissions, contact your account administrator.
