Management Console Training Reference Guide





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etfile

etfile Management Console

Introduction:

The purpose of this section is to create **Users** for the etfile software. The **Users** will be added to **Groups**. Permissions are granted or removed for each **Group** to determine what features of the software you will allow each **User** to have. By adding **Users** to a **Group** you can control permissions easier at the **Group** level and simplify the process of managing permissions. The Management Console is intended for Administrators of the etfile Software. We recommend designating a few **Users** to be the Administrator of the **etfile** system and ensuring those **Users** have sufficient privileges, which is discussed in this Training Guide.

Security Manager Console Topics Covered:

- Creating **Groups** and **Users**
- Adding **Users** to a **Group**(s)
- Setting permissions for Groups and Users.
- Discuss User Passwords
- Setting security for the User passwords
- Resetting a password for a User
- Setting a **Security Policy**

Concepts and Definitions

User

A User is a login into etfile and any of its associated modules.

- Each User has an ID and a password to login into etfile
- A User can be a member of one or more Groups.
- A User can have access rights on top of those derived from the Groups of which they are a member.

Group

A Group is a container with defined permissions to features in eTFile.

• **Group** could have one or more users.

User Interface of the Management Console

- On the left hand side of the display is a tree view showing all the **Groups** and **Users** in etfile.
- Right hand side of the display is a list view that shows details of items selected in tree on the left hand side.

Standard Groups

There are four standard **Groups** pre-defined in the Security Manager Console:

- 1. Document Viewer
- 2. Power User
- 3. Administrator
- 4. Super Admin

Document Viewer

This is the most basic group in etfile.

• This is the default group for any new User created in etfile.

Power User

- This **Group** is for more advanced **Users** since it has permissions to create and modify data in etfile.
- Typically, a scan station **User** would belong to this group.

Administrator

- Members of this Group are responsible for overall administration of **etfile** like creating File Rooms and cabinets, creating scan descriptions, etc.
- This **Group** has most of rights in etfile except for deleting data.

Super Admin

• The select few members of this **Group** have all the rights in etfile except the right to manage **User** accounts and permissions.



Creating a Custom Group

In addition to pre-defined **Groups**, **Users** can create their own **Groups** with custom access rights. Creating your own Group is recommended if the access rights you want to grant your **Users** are not satisfied by the pre-defined **Groups** and you have a few **Users** to whom you want to assign those rights.

1. Log into the Security Management Console by double clicking the icon



If this icon is not present navigate to where etfile is installed, for isntance,

C:\Apres\etfile. Right click on eTSecureMan, eTSecureMan and choose send to desktop. This will create the icon for the Management Console.

NOTE: If you cannot locate the install directory please contact our Technical Support Group for assistance or your IT department. Please note in order to proceed with these document instructions you will need to to login with a User that has sufficient privileges to create **Group** and **Users** and set permissions.

- 2. Use one of the following options to create a new Group and launch the Group **Profile** dialog box:
 - Select the item *Groups* on the left side console tree and use the menu option *Action New Security Group*.
 - Right click the item *Security Groups* on the left side console tree and use the menu option *New Security Group*.

etfile

Group Profile			
General Permissio	ins		
Group <u>N</u> ame:	Test Group		
Description:	Test description		
M <u>e</u> mbers			
User Name		User ID	
Add	<u>R</u> emove		
		<u>C</u> reate	Cancel



General Tab

- *General* tab allows you to enter a name and description for your Group.
- You can add and remove **Users** belonging to the group using the *Add* and *Remove* buttons respectively in the above dialog.

NOTE: Creating new Users is discussed in the next section. Once a new User is created you can Add them to a Group through the Member of Tab on the User **Profile** screen or you can follow the instructions below to Add a User to the Group in the Group Profile screen. By right clicking on the Security Group or the Users you can Modify a User or Group.

- 1. To add a User to a Group select the *Add* button. A list of the Users will display.
- 2. Select the Users in the list and click *OK* to add selected Users to the Group.
- 3. To remove Users from the Group, select the Users and click the *Remove* button.

Users	
<u>A</u> vailable Users:	
User Name	User ID
🕵 Security Manager	SECMNGR
🖸 Test User	TESTUSER
Te T	
<	
OK Cance	



Permissions Tab

The **Permissions Tab** on the Group Profile enables you to set the **Group** permissions. All **Users** belonging to this **Group** will inherit these permissions.

- 1. Select the **Permissions Tab** on the **Group Profile** screen next to the **General** tab.
- 2. Click on the checkbox below the **Allow** column to grant the **Group** access to a particular feature or select the checkbox below the **Deny** column to take away the permission of a feature.

General Permissions Permissions Image: Allow Deny Copy Folders and Documents Image: Allow Deny Enable disabling of diary item prompt after Image: Allow Deny Generate Audit Reports Image: Allow Deny Manage annotation tools Image: Allow Deny Manage client logins Image: Allow Deny Manage diary subjects Image: Allow Deny Manage diary subjects Image: Allow Deny Manage user-level flagging of email after ir Image: Allow Deny Manage user-level flagging of email after ir Image: Allow Deny Manage zonal OCR templates Image: Allow Deny Move Folders and Documents Image: Allow Deny Movefolw Console Image: Allow Deny Console Image: Allow Deny Movefoleve FileRoom	Group Profile		×
Feature Allow Deny Copy Folders and Documents Image	General Permissions		
Copy Folders and Documents Image Enable disabling of diary item prompt after Image Generate Audit Reports Image Manage annotation tools Image Manage client logins Image Manage Collaboration Workspaces Image Manage Contacts Image Manage diary groups Image Manage diary subjects Image Manage diary system options Image Manage e TFile - Outlook module settings Image Manage user-level flagging of email after in Image Manage zonal OCR templates Image Move Folders and Documents Image Perform Third Party Integration Image Set Permissions on Document, Folder, Cat Image Use Workflow Console Image Create and Edit FileRoom Image Delete FileRoom Image	Permissions		
Enable disabling of diary item prompt after Image Generate Audit Reports Image Manage annotation tools Image Manage client logins Image Manage Collaboration Workspaces Image Manage Contacts Image Manage diary groups Image Manage diary subjects Image Manage e TFile - Outlook module settings Image Manage user-level flagging of email after in Image Manage vacation planner Image Manage zonal OCR templates Image Move Folders and Documents Image Perform Third Party Integration Image Set Permissions on Document, Folder, Cat Image Use Workflow Console Image Create and Edit FileRoom Image Delete FileRoom Image	Feature	Allow De	eny 🔺
Manage diary groups Image diary subjects Manage diary system options Image diary system options Manage e TFile - Outlook module settings Image diary system options Manage user-level flagging of email after ir Image diary system options Manage user-level flagging of email after ir Image diary system options Manage user-level flagging of email after ir Image diary system options Manage user-level flagging of email after ir Image diary system options Manage vacation planner Image diary system options Image diary system options Manage zonal OCR templates Image diary system option Image diary system option Move Folders and Documents Image diary system option Image diary system option Set Permissions on Document, Folder, Cat Image diary system option Image diary system option Set Permissions on Document, Folder, Cat Image diary system option Image diary system option Create and Edit FileRoom Image diary system opt	Enable disabling of diary item prompt after Generate Audit Reports Manage annotation tools Manage client logins Manage Collaboration Workspaces		2
Manage user-level flagging of email after ir Image vacation planner Manage vacation planner Image vacation planner Manage zonal OCR templates Image vacation planner Move Folders and Documents Image vacation Perform Third Party Integration Image vacation Set Permissions on Document, Folder, Cat Image vacation Use Workflow Console Image vacation Create and Edit FileRoom Image vacation Delete FileRoom Image vacation	Manage diary groups Manage diary subjects Manage diary system options Manage eTFile - Outlook module settings	य ा र	2
Delete FileRoom	Manage user-level flagging of email after ir Manage vacation planner Manage zonal OCR templates Move Folders and Documents Perform Third Party Integration		
	Use Workflow Console Create and Edit FileRoom Delete FileRoom	। । । ।	
Modify Cancel		Modify	Cancel

Creating Users

Note: The system is set up with a few default **Users**. Our Technical Support group uses the **APRES** user and **Security Manager User** for purposes of troubleshooting any issues during a support call. Please do not change the password to these users.

- Any User who uses etfile or its associated modules should have an account (User ID and password) to login into etfile.
- It is not recommended to use common accounts for multiple users since User IDs are used to track their actions in the etfile Analytics Tool.
- 1. To Create a **User** choose one of the methods described below:
 - Select the item *Users* in console tree and use the menu option *Action New User* or
 - Right click the item *Users* in console tree and use the menu option *New User*.

≞_ 12- 88 III				
Action View Help				
Console Root	User Name	User ID	Group Membership	Description
- 🔏 Groups	<u></u> 1234	1234	Document Viewer	
- 🌯 Administrator	👗 ABCD	ABCD	Power User, Document Viewer	
- 🐴 Document Viewer	👗 Buckeye	BUCKEYE		
Nower User	👗 Chris	CHRIS		
Super Admin	占 Dec Page	DECPAGE	Super Admin, Document Viewer	
Users	👗 etfile	ETFILE	Super Admin, Document Viewer	
AL New User	👗 Frank Smith	FRANK SMITH	Document Viewer	
All Vacadion Planner	👗 George Pataky	GEORGE	Super Admin, Document Viewer	
	🦾 John	JOHN	Super Admin, Power User	
	👗 Julie Smith	JULIE SMITH	Power User, Document Viewer	Added create cabinets to this security
	📕 🚣 Junk Mail	JUNKMAIL	Document Viewer	
	👗 Lily	LILY	Super Admin	
	👗 MailRoom	MAILROOM	Power User, Document Viewer	
	👗 Mary Smith	MARY	Super Admin, Document Viewer	
	👗 Melissa	MELISSA G	Super Admin, Power User	
	🚨 Melissa M	MELISSA	Super Admin, Power User	
	🚣 Melissa Malee	MMALEE	Administrator, Power User, Document Viewer	
	👗 Mike	MIKE	Power User, Document Viewer	
	🚣 Paul	PAUL	Super Admin, Document Viewer	gave 3rd Party Intergration
	👗 Paul Smith	PAUL SMITH	Power User	
	👗 per Lines	PL	Document Viewer	
	🚣 Recycle	RECYCLE	Power User, Document Viewer	
	👗 Recycle Bin	RB	Super Admin, Document Viewer	
	👗 Security Manager	SECMNGR		User accounts and Groups Manager
	TEST	TEST	Super Admin, Administrator, Document Viewer	



General Tab

This tab allows you to enter the basic information for the User.

- User Name: Required. Full name of the User
- *User ID:* Required. Login ID of the User. This is used when the User logs in into etfile or any of its associated modules. User ID can be up to 16 characters long. Please note that User ID cannot be changed once the User is created.
- Description: (Optional). A general description for the User.
- *Password:* Password can be a combination of letters and numbers up to 10 characters long.
- Confirm Password: Confirm the password entered in Password field.

NOTE: Passwords can be left blank when creating a User. This will allow the User to enter their User ID and a **blank password**. The user will be prompted to create a password at login. This method is recommended when creating Users.

🔁 etfile Management Console						_ @
Action View Help						
	User Name 1234 ABCD Buckeye	12 AB	CD	Group Membership Document Viewer Power User, Document Viewer	Description	
Power User Super Admin Super S	A Chris Chris Cec Page Etfile		ICKEYE IRIS	×		
Vacation Planner	Frank Smith George Pataky John Jule Smith Junk Mail Uily MailRoom Mary Smith Melissa Melissa M Melissa Malee Melissa Malee Make	General Member DI User Name: User ID: Description: Password:	f Permissia	ons	Added create cabinets to this sec	urity
	Aul Paul Smith Fer Lines Recycle	Confirm Password:			gave 3rd Party Intergration	
	Accycle Bin Security Manager TEST			Create Cancel	User accounts and Groups Manag	er
<u> </u>						

2. Fill in the User Name, User ID and the optional Description and Password on the General Tab.



Member of Tab

This tab defines Group memberships for the User.

• A User can be a member of more than one Group. In this case, the User gets access rights of the highest Group that he is the member of. For example, if the User is a member of Document Viewer and Power User, resultant User rights are those of the Power User.

User Profile			
General Memb	er Of Perm	issions	
Member of			
Group Nam		Description	工川
St Docume	nt Viewer	Group with basic viewing permissions	
Add	<u>R</u> emov	-	
		<u> </u>	
		Modify	Cancel



- 3. Click **Add** at the bottom of the **Member of** tab on the **User Profile** screen to add the **User** to one or more **Groups**. Only those **Groups** that the **User** is not a member of are listed.
 - The following dialog is displayed:

Groups	
<u>A</u> vailable Groups:	
Group Name	Description
Administrator	Admin Group
🕵 Power User	Group with some modify permiss
🕵 Super Admin	Group with all permissions
🕵 Test Group	This is description for test group
<	· · · · · · · · · · · · · · · · · · ·
OK	Cancel

4. Select the Group(s) and click *OK* to add the User to the Group(s)

5. To remove a User(s) from a **Group** select the **Group**(s) to remove the **User** from and click the **Remove** button.

Permissions Tab

This tab displays the permissions of the **User** and enables you to modify individual **User** rights.

Note: Please note that it is not possible to remove any access rights that the User inherits from the Group memberships. You can assign Users additional rights in addition to the rights inherited from the Groups that they are a member. For example, if the User is member of Power User Group the User has the right to scan documents. It is not possible to take this right away from the User as long as he is a member of the Power User Group. You can assign the User additional rights (e.g. Create Cabinet ...) that are not a part of Power User Group.

Use	r Profile		X
	neral Member Of Permissions		
	Feature	Allow	Deny 🔼
	Copy Folders and Documents Generate Audit Reports Import Contacts Manage User Accounts and Groups Move Folders and Documents Perform Third Party Integration Schedule Tasks Set pemissions on Document, Folder, Cab Create and Edit FileRoom Delete FileRoom		สสสาสสาสสา
	Create and Edit Cabinet Templates		
	Create and Edit Cabinets Delete Cabinets		× ×
	<		>
		<u>M</u> odify	Cancel

6. Select **Allow** or **Deny** for each feature of **etfile** you want the **User** to have permissions to use.



Modifying a Group

Use any of the following options to modify a Group,

- Select the Group in console tree and use Action Modify Group menu.
- Right click the Group in console tree and use Modify Group option.
- Double click the **Group** in the console tree.
- Double click the **Group** in the list view on the right hand side.
- Right click the **Group** in the list view on the right hand side and use **Modify Group** option.

All dialogs and operations for modifying a **Group** are same as creating new **Group**. Please refer to the section on creating new **Group** for details.

• It is not possible to modify a name and permissions of standard (etfile predefined) Groups.

Modifying a User

Use any of the following options to modify a User,

- Select the User in console tree and use Action Modify User menu.
- Right click the user in console tree and use **Modify User** option.
- Double click the **User** in the console tree.
- Double click the **User** in the list view on the right hand side.
- Right click the **User** in the list view on the right hand side and use **Modify User** option.

All dialogs and operations for modifying a **User** are same as creating new **User**. Please refer to the section on creating new **User** for details.

- All attributes of **User** can be modified except the **User ID**.
- It is not possible to modify name and permissions of standard (etfile predefined) Users.

Deleting a Group

To delete a **Group**, select the **Group** in the console tree and use **File** – **Delete Group** menu option.

• It is not possible to delete standard **Groups**.

Deleting a User

To delete a User, select the user in the console tree and use File – Delete User menu option.

• It is not possible to delete standard **users**. If you delete a **user** you will not be able to run reports on this **User** in the AUDIT Tool.



Setting a Security Policy for User Passwords

Introduction:

The purpose of this section is to describe how to set a Security Policy for Users of etfile. Setting a **Security Policy** ensures a more secure method for User's passwords. Each User of etfile has the ability to select the **Change** option at the etfile Login in order to change their password anytime. When a Security Policy is setup the User has to follow a certain criteria in order to set up their password.

eTFile Login		×
User ID:	APRES	Details
Password:		Change
	Login	Cancel

To Set a security Policy:

- 1. Log into etfile Security Manager.
- 2. On the top right menu bar Select Actions-Set Security Policy.

1.0	シ目前		
6	ction View Belp		
81	tiew Security Group	Security Group Name	Description
1	Modify	AL Administrator	Admin Group
	Briefe	AL Commercal Lines AL Document Viewer	Group with basic viewing permissions
	Set Security Policy	All self. All JoseGroup All Marketing	Human Rescouce documents
	tyt		Training for Jose
	Se Marketing Se Office Admin Se Power User Sales (AUTO) Se Super Admin	Ag Office Admin Ag Power User Ag Sales (AJTO) Ag Super Admin Ag Trainse	Group with some modify permissions like scar Super Administrator Training Class I with John



3. The **Security Policy** window will display. Select the options you want to set and select **OK**.

Security Policy
Enforcing a stricter security policy may require users to change their passwords to conform to the new policy. A zero (0) setting means no limitation.
Criteria
User cannot reuse last 0 🛨 passwords
Password must change every 0 📩 days
Password must be at least 5 🗧 characters in length
Password must contain 1 🗧 of 4 character groups
- Lower-case (a-z)
- Upper-case (A-Z)
- Numbers (0-9)
- Special characters (Such as !@#\$%)
OK Cancel

4. If a **User** tries to log into etfile with a password that does not meet the criteria set for the **Security Policy** the message below will display for the **User** which describes the policy so they can reset the password accordingly.

Security Po	licy check failed	X
8	Password does not comply with the current Security Policy. Please reset your password which satisfies the following criteria: - has at least 5 characters; - contains at least 1 of the following four character groups: Lower case(a-z); Upper case(A-Z); Numbers(0-9); Special characters(such a !@#\$%);	as
	0	к



Resetting a User's Password

If a User forgets their password log into the Management Console to reset the password.

- 1. Right click on the User and select Modify User.
- 2. On the **General** Tab of the **User Profile** screen type in a **Password** and type it a second time in the **Confirm Password** field for this **User**.
- 3. Select **Modify** and provide the **User** with the new password. The **User** can select **Change** at the login screen to change their password.