

Use privileges (set in **Vaults|Security...**) to secure which user (or guest user) has access to which special functions in PowerFlow. Below are the currently enabled security options, by *menu*, to use as a guideline for fine-tuning user interaction with PowerFlow. Items *not* listed do not require specific rights.

Main Menus

Menu	Menu Item	Rights Required
PowerFlow	Licensing	Admn (Administrator)
PowerFlow	PowerFlow Server Setup	Admn (Administrator)
PowerFlow	Email Notification Setup	Admn (Administrator)
Vaults	Synchronize	Outpt (Output)
Vaults	Options	Admn (Administrator)
Vaults	Security	Admn (Administrator)
Vaults	Structure	VltBld (Vault Builder)
Vaults	Synchronization Setup	VltBld (Vault Builder)
Vaults	Audit Review	Admn (Administrator)
Folders	New	Edit
Folders	Modify	Edit
Folders	Duplicate	Edit
Folders	Lock	Edit
Folders	Delete	DelFld (Delete Folder)
Folders	Save Shortcut	Exprt (Export)
Folders	Email Shortcut	Exprt (Export)
Documents	New	Edit
Documents	Modify	Edit
Documents	Duplicate	Edit
Documents	Lock	Edit
Documents	Delete	DelDoc (Delete Document)
Documents	Save Shortcut	Exprt (Export)
Documents	Email Shortcut	Exprt (Export)
Items	New	Edit
Items	Modify	Edit
Items	Duplicate	Edit
Items	Lock	Edit
Items	Delete	DelItem (Delete Item)
Items	Auto-number	Edit
Items Panel	Move Up	Edit
Items Panel	Move Down	Edit
Items	Launch External Application	Outpt (Output)
Items	Save As	Exprt (Export)
Items	Send Via Email	Outpt (Output)

User Privileges

Quick-start

Menu	Menu Item	Rights Required
Items	Save Shortcut	Exprt (Export)
Items	Email Shortcut	Exprt (Export)
Find	Prepare Find OCR	Admn (Administrator)
Filter	Edit Filters	Admn (Administrator)
Filter	Show Deleted	Admn (Administrator)
Filter	Show Templates Only	Admn (Administrator)
Filter	Show Audits	Admn (Administrator)
Filter	Show Audits and Data	Admn (Administrator)
Send	Print Output	Outpt (Output)
Send	Fax Output	Outpt (Output)
Send	Email Output	Outpt (Output)
Send	Export Vault	Exprt (Export)
Send	Export Data	Exprt (Export)
Send	Copy to Transfer	Exprt (Export)
Send	Move to Transfer	Exprt (Export) & Del itm (Delete Item) & Edit
Send	Email Notifications	Admn (Administrator) & Edit
Receive	Import Vault	Imprt (Import)
Receive	Import Data	Imprt (Import)
Receive	Import Items	Imprt (Import)
Receive	Scan Images	Scan
Receive	Import Transfers	Imprt (Import) & Edit
Receive	Select Import Batch	Imprt (Import)
Tools	Configure Tools	Admn (Administrator)
Tools	Configure Integration	Admn (Administrator)

WP Main Menus and Context Menus (right-click on WP)

Menu	Menu Item	Rights Required
File	Save Changes	Edit
File	Revert Changes	Edit
File	Load from File	Edit
File	Save Copy to File	Outpt (Output)
File	Preview	Outpt (Output)
Edit	Undo	Edit
Edit	Redo	Edit
Edit	Cut	Edit
Edit	Copy	Edit
Edit	Paste	Edit

User Privileges

Quick-start

Menu	Menu Item	Rights Required
Edit	Delete	Edit
Edit	Replace	Edit
Edit	Form Mode	Admn (Administrator)
View	Edit Body	Admn (Administrator)
View	Edit Header	Admn (Administrator)
View	Edit Footer	Admn (Administrator)
Character	Font Settings	Edit
Character	Normal	Edit
Character	Bold	Edit
Character	Italic	Edit
Character	Underlined	Edit
Character	Strike Out	Edit
Character	Superscript	Edit
Character	Subscript	Edit
Paragraph	Paragraph Settings	Edit
Paragraph	Page Layout	Edit
Paragraph	Borders	Edit
Paragraph	Tab Stops	Edit
Paragraph	Bullets...	Edit
Paragraph	Left	Edit
Paragraph	Center	Edit
Paragraph	Right	Edit
Paragraph	Justified	Edit
Paragraph	Prior Level	Edit
Paragraph	Next Level	Edit
Paragraph	Bullets	Edit
Paragraph	Numbers	Edit
Outline	Include in Outline	Edit
Outline	Outline Level Up	Edit
Outline	Outline Level Down	Edit
Table	Create Table	Edit
Table	Select Row	Edit
Table	Insert Row	Edit
Table	Delete Row	Edit
Table	Select Column	Edit
Table	Insert Column	Edit
Table	Delete Column	Edit
Table	Combine Cells	Edit
Table	Split Cells	Edit

User Privileges

Quick-start

Menu	Menu Item	Rights Required
Table	Outer Borders	Edit
Table	Inner Borders	Edit
Table	Bottom Borders	Edit
Table	Right Borders	Edit
Table	Left Borders	Edit
Table	Top Borders	Edit
Table	Switch Borders On	Edit
Table	Switch Borders Off	Edit
Insert	Token	Edit
Insert	Tag	Edit
Insert	Formula	Edit
Insert	Page Number	Edit
Insert	Page Count	Edit
Insert	Date	Edit
Insert	Time	Edit
Insert	Insert Hyperlink	Edit
Insert	Symbol	Edit
Insert	Graphic	Edit
Insert	Background Form	Edit
Insert	Bookmark	Edit
Insert	File	Edit
Table (Cell Alignment)	Align Top	Edit
Table (Cell Alignment)	Align Middle	Edit
Table (Cell Alignment)	Align Bottom	Edit
Graphics	Treat As Char	Edit
Graphics	Anchor to Paragraph	Edit
Graphics	Position Left of Text	Edit
Graphics	Position Right of Text	Edit
Graphics	Position Over Text	Edit

Import Context Menu (right-click on Import, Transfer, Scan items)

Menu	Menu Item	Rights Required
n/a	Toggle Assign All	Edit
n/a	Toggle Assign Selected	Edit
n/a	Unassign Document	Edit
n/a	Commit Assignments	Edit
n/a	Find next Assigned	Edit
n/a	OCR Scripting	Edit
n/a	Copy to Transfer	Exprt (Export)

Menu	Menu Item	Rights Required
n/a	Move to Transfer	Exprt (Export) & DelItm (Delete Item) & Edit
n/a	Save As	Exprt (Export)

Image Context Menu (right-click on Graphic Viewer)

Menu	Menu Item	Rights Required
n/a	Clip Selection	Outpt (Output)
n/a	OCR Selection	Edit
n/a	Add Annotation	Edit

Notes

- If **View** rights, then applications can only be launched "read-only". View right is not available explicitly in local Vault Security, but it can be set by not giving any rights.
- Must have **Edit** rights to use *Move Documents* and *Move Items* options in the *Manage Bookmarks* dialog.
- Must have **Edit** rights to modify any tags (primary or secondary), *except* for the "FreeAccess" tags, which anyone can modify.
- Graphic items *can* be rotated with **View**, but changes will not be saved to the DB unless the user has **Edit** rights.
- Annotations require **Edit** rights unless **Allow annotation editing for non-Edit users** option is selected for a cabinet in *Vault Structure* under the *Misc* tab.
- Ruler clipping in the graphic viewer can only be saved to a new document with **Edit** rights.
- Must have **Admn** (Administrator) rights to modify output templates.
- Must have **Admn** (Administrator) rights to use *Vault Integration* design mode.
- Structure option in the *Vaults* menu is not visible by default even though a user might have **VltBld** (Vault Builder) rights. To make the *Structure* option visible, either close the open vault or close the open cabinet by pressing the **Esc** key repeatedly until all the panels are closed and only cabinet names are visible. Press **Ctrl+V**. The *Enter License Key* dialog should display: enter the *Organization Name* and *License Key* and press **OK**.
- Must have **Admn** (Administrator) rights to change local or remote security rights.