

User Privileges

Quick-start

Use privileges (set in **Vaults|Security...**) to secure which user (or guest user) has access to which functions in PowerFlow. Below are the currently enabled security options, by *menu*, to use as a guideline for fine-tuning user interaction with PowerFlow.

Main Menus

Menu	Menu Item	Rights Required
PowerFlow	Licensing	Admn (Administrator)
PowerFlow	Check for Updates	Admn (Administrator)
PowerFlow	PowerFlow Server Setup	Admn (Administrator)
PowerFlow	PowerFlow Client Setup	Edit
PowerFlow	Fax Setup	Admn (Administrator)
PowerFlow	Email Setup	Admn (Administrator)
PowerFlow	Email Notification Setup	Admn (Administrator)
PowerFlow	OCR Setup	Admn (Administrator)
Vaults	Connect	Edit
Vaults	Open	Edit
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

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Menu	Menu Item	Rights Required
Items	Delete	DelItm (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)
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) & DelItm (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

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Menu	Menu Item	Rights Required
File	Save Copy to File	Output (Output)
File	Preview	Output (Output)
Edit	Undo	Edit
Edit	Redo	Edit
Edit	Cut	Edit
Edit	Copy	Edit
Edit	Paste	Edit
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

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Menu	Menu Item	Rights Required
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
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 Selected	Edit
n/a	Toggle Assign All	Edit
n/a	Unassign Document	Edit
n/a	Find next Assigned	Edit
n/a	OCR Scripting	Edit
n/a	Commit Assignments	Edit

Image Context Menu (right-click on Graphic Viewer)

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

Notes

- If **View** rights, then applications can only be launched "read-only".
- Must have **Edit** rights to set a bookmark or use bookmarks.
- 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.
- Ruler Clipping in the graphic viewer can only be saved to 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.
- Must have **Admn** (Administrator) rights to change local or remote security rights.

