

Workspace security quick reference

The guide provides an overview of the security options and functions in a workspace.

Groups permission view

| Group Name | View Users | Edit Permissions | Copy | Preview |
|-----------------------|------------|------------------|------|---------|
| Level 1 | View Users | Edit Permissions | Copy | Preview |
| Level 2 | View Users | Edit Permissions | Copy | Preview |
| Level 3 | View Users | Edit Permissions | Copy | Preview |
| Reg Group | View Users | Edit Permissions | Copy | Preview |
| System Administrators | View Users | | | |

| Group management security settings | |
|------------------------------------|--|
| View Users | Copy the selected group's permissions to a new or existing group. |
| Edit Permissions | Edit the permissions of the group for objects, tab visibility, and other settings. |

| Group management security settings | |
|------------------------------------|---|
| Copy | Copy the selected group's permissions to a new or existing group. |
| Preview | Opens a preview of the Relativity workspace with the selected group's permissions applied. |
| Add/Remove Groups | Add or remove groups in the environment for a particular workspace and begin editing their permissions. |

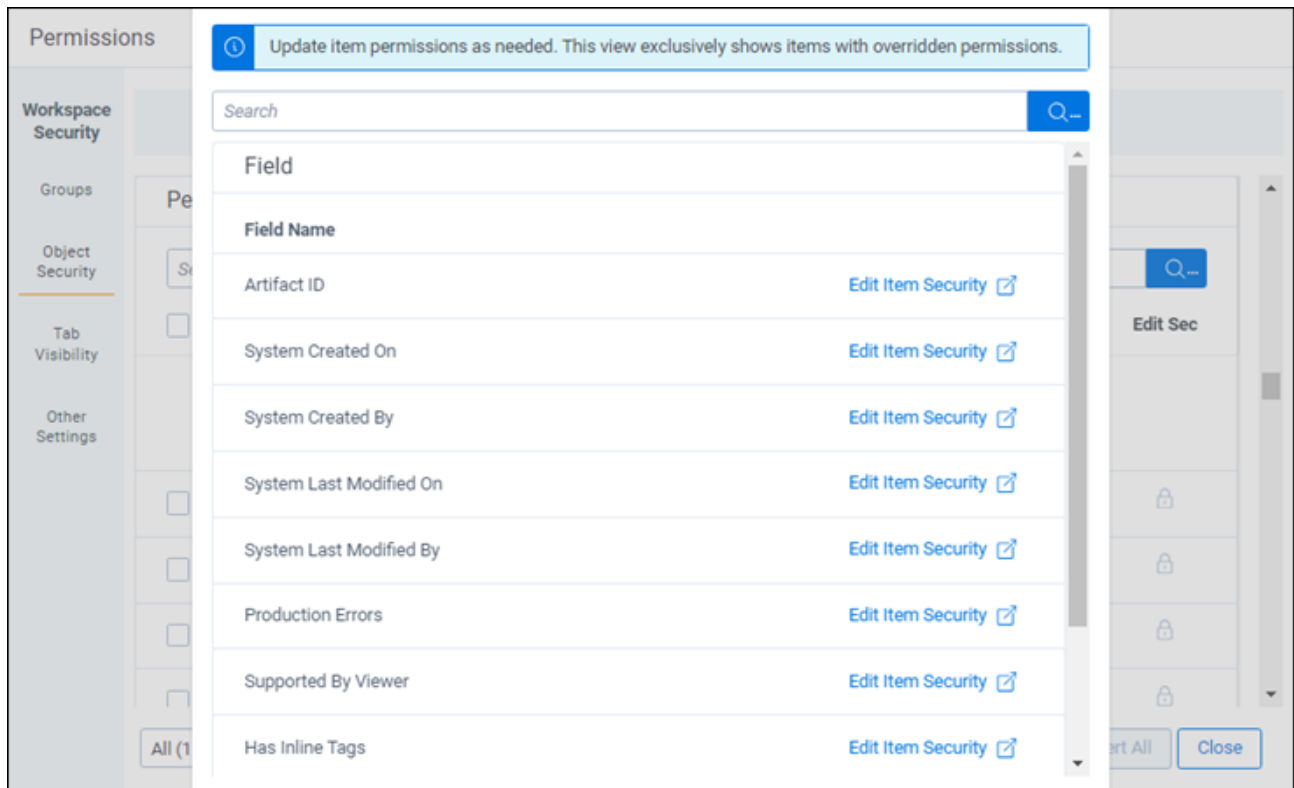
Object security permissions view

The screenshot shows the 'Object Security' view in Relativity. On the left, there is a sidebar with navigation options: 'Workspace Security', 'Groups', 'Object Security' (selected), 'Tab Visibility', and 'Other Settings'. The main area is titled 'Object Security' and contains a 'Permissions' section. At the top, there is a search bar. Below it is a table with columns for 'Permission Name', 'None', 'View', 'Edit', 'Delete', 'Add', and 'Edit Sec'. The 'Field' permission is selected, and its 'Item Overrides' are shown. At the bottom, there are buttons for 'All (122)', 'Apply to Selected', 'Save', 'Revert All', and 'Close'.

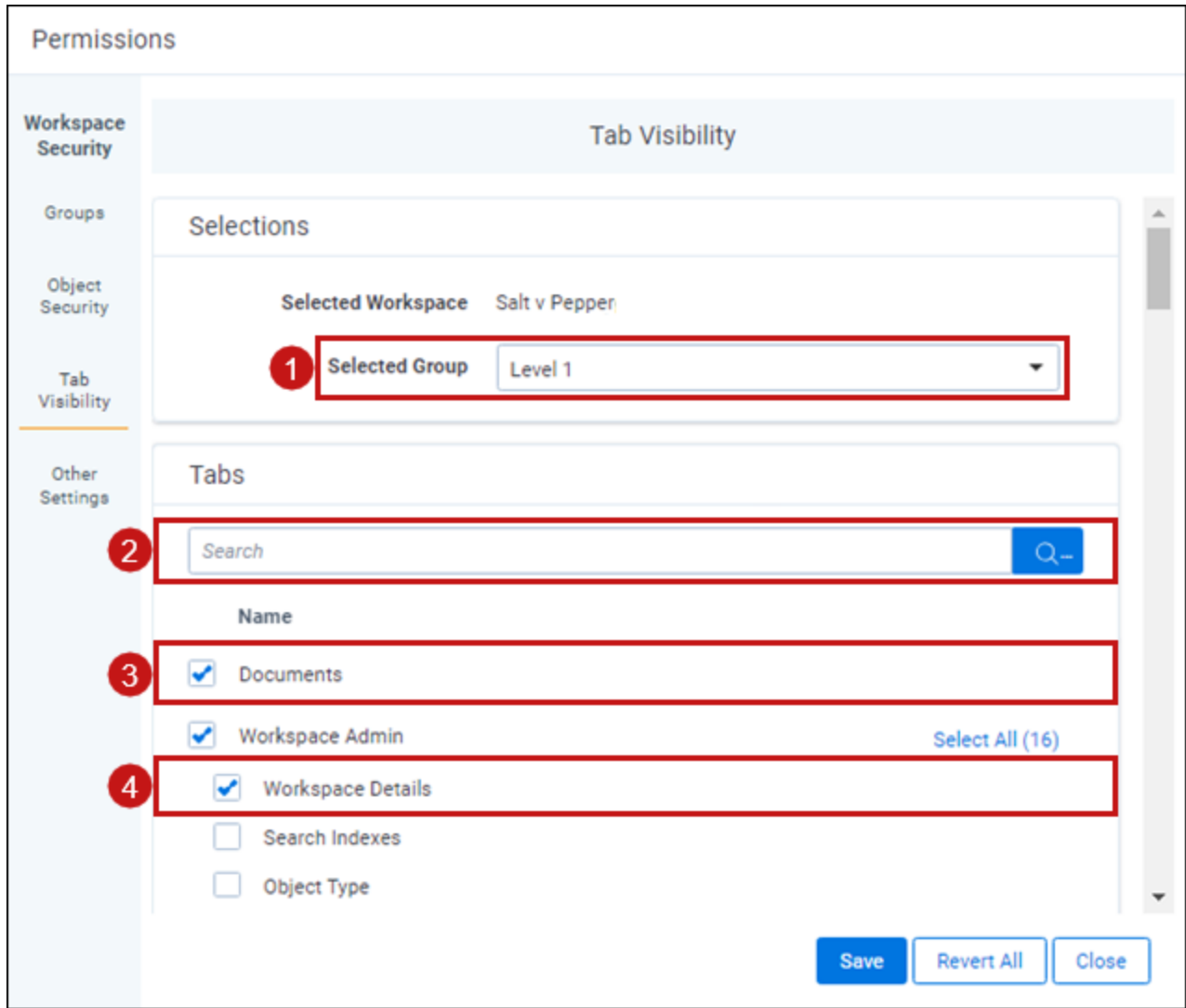
| Object security permission controls | | |
|-------------------------------------|-------------|---|
| | None | Denies the group members access to the object. |
| | View | Group members can view the object. This is the most basic level of permissions. |
| | Edit | Group members can edit and view the object. |

| Object security permission controls | | |
|-------------------------------------|-----------------------|---|
| | Delete | Group members can delete the object. |
| | Add | Group members can add new instances of the object. |
| | Edit security | Group members can edit the security for instances of the object. |
| Item Overrides | Item Overrides | If item-level security is applied to an object, it is marked with this link. Click the link to customize permissions for the chosen item. |
| | Toggle | Toggle to give or remove access to the object's sub-features. |

Item overrides view



Tab visibility



Tab visibility

| | | |
|---|-----------------------------|--|
| 1 | Group drop-down menu | Displays the current group whose permissions you're editing. |
| 2 | Search bar | Type the name of the tab you want to make visible for the group. |
| 3 | Selected tab | This tab is visible for the group. |
| 4 | Child tab | You can select a parent tab for visibility without the child tabs. However, you cannot select a child tab for visibility without its parent. |

Other settings

Permissions

Workspace Security

Other Settings

Groups

Object Security

Tab Visibility

Other Settings

Selections

Selected Workspace JZ Salt v Pepper - 2510 [DO NOT DELETE]

Selected Group Level 1

Browsers

- Folders
- Field Tree
- Advanced & Saved Searches
- Clusters
- Document Preview

Mass Operations

- Assign to Entity
- Cluster
- Convert

Admin Operations

- Allow dtSearch Index Swap
- Allow Export
- Allow Import
- Assign Batches
- Communication Analysis Widget
- Delete Object Dependencies
- Download Relativity Desktop Client
- Email Thread Visualization
- Export Dashboard
- Manage Object Types

Save Revert All Close

Other settings

| | | |
|---|-----------------------------|---|
| 1 | Group drop-down menu | Displays the current group whose permissions you're editing. |
| 2 | Browsers | Gives users the ability to view the selected browsers in the documents tab. |
| 3 | Mass Operations | Gives users the ability to perform selected mass operations. |
| 4 | Admin Operations | Gives users the ability to perform selected admin operations. |

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