

Workspace security quick reference

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

Feature permissions view

Groups permission view

Permissions

Workspace Security

Groups

Object Security

Tab Visibility

Other Settings

Groups

Selections

Selected Workspace

Salt v Pepper

Group List

Group Name

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

Add / Remove Groups

Close

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.
Copy	Copy the selected group's permissions to a new or existing group.

Group management security settings

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

Permissions

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Groups
Object Security
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Other Settings

Object Security

Permissions

☐ Permission Name	None	View	Edit	Delete	Add	Edit Sec
☐ Document Error						
☐ Domain						
☐ Entity						
☐ Error Category						
☐ Event Handler						
☐ Field						

☐ Add Field Choice By Link

Item Overrides

All (122)
Apply to Selected
Save
Revert All
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.
	Delete	Group members can delete the object.
	Add	Group members can add new instances of the object.

Object security permission controls			
	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

Permissions

Update item permissions as needed. This view exclusively shows items with overridden permissions.

Search

Field	
Field Name	
Artifact ID	Edit Item Security
System Created On	Edit Item Security
System Created By	Edit Item Security
System Last Modified On	Edit Item Security
System Last Modified By	Edit Item Security
Production Errors	Edit Item Security
Supported By Viewer	Edit Item Security
Has Inline Tags	Edit Item Security

Tab visibility

Permissions

Workspace Security

Groups

Object Security

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Tab Visibility

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Selected Workspace

Salt v Pepper

1

Selected Group

Level 1

Tabs

2

Search

Q-

3

Name

Documents

Workspace Admin

Select All (16)

4

Workspace Details

Search Indexes

Object Type

Save

Revert All

Close

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.

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Other settings

Permissions

Workspace Security
Groups
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Tab Visibility
Other Settings

Other Settings

Selections

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

1 Selected Group Level 1

2 Browsers

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

4 Mass Operations

☒ Assign to Entity
☐ Cluster
☐ Convert

3 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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