

Set Up & Security

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Quantum Center Set-up

- Internal Support: Enter the name and contact information for the individual who will provide internal support to your users
- Library set up: Link Expirations: Enter the number of days that links to Library files will expire
- Review Notifications: Select yes, if you want an email notification to be sent to users so that they can review & identify outdated files to be deleted or archived
- Default time period for file review is 1 year
You can override the default time period for file review when you upload a new file, and under Attributes, select a new date for review.
- If yes, select users to receive email notification
- Add company logo to your home page – browse local drives, select logo and save

Workgroup Security

From the Home page, select workgroups:

All workgroups for your company are displayed on this page

Add Workgroups: Select ADD and enter workgroup name

Edit Workgroups: Select PENCIL icon to change access & permissions for existing workgroup

Assign & Usage Rights to your workgroup by selecting the respective Tool Tab

Home Permissions: We recommend these be assigned to your Center Admin

Library Permissions: Access allows the workgroup to use your Library

Admin allows the workgroup all Functions & Report access

Workgroups can be assigned individual Functions & Report access

Data, Email, Apps

Contacts Permissions: These tools can be customized for your company by workgroups with Admin rights

Add Users & Assign to Workgroups

From the Home page, select users:

Add: Select ADD User (top left) and enter contact information, email address & assign to one or more workgroups


Edit: Select PENCIL icon to change a user's workgroup assignment or contact info



Deactivate: From the user grid, select the red X at the far right or select the PENCIL icon and select DEACTIVATE from the pull down menu.

NOTE: Users are never deleted from your Center and can be reactivated.

Library Folder Access & Permissions


Library folder permissions are granted to workgroups in your Library folder tree.

- select Your Library folder
- Select the FOLDER EDIT ICON  and the Folder Security Tab
- A list of all workgroups will be presented with these options
 - No Access
 - Read Only
 - Read/Write (or the ability to access and upload to folders)

- Select the security rights for each workgroup
- Rights set up in **Your Library folder** will be inherited by all folders and sub folders in your filing tree
 - If you want to apply Read or Read/Write rights to ALL Folders for a single workgroup
 - Select Your Library folder, select the FOLDER EDIT ICON and folder Security Tab
 - Select the disinherit icon 
 - Assign the new permission and hit SAVE
 - If you want to override inherited permissions to a folder branch and its sub folders **UNDER Your Library folder** for a workgroup
 - Select Your Library folder, FOLDER EDIT ICON and Folder Security Tab
 - To disinherit permissions, select the disinherit icon,  and assign the new permission
 - That folder and all sub-folders within the folder branch will inherit those permissions

One important note: If the upper-most folder in any folder branch is designated NO ACCESS with a blue radio button, you cannot override permissions for subfolders.

Trouble shooting:

- Workgroup members have access to the Library but no folders
 - Check Your Library security settings
 - If the workgroup has a blue button under No Access
 - select the disinherit icon 
 - select no access & save
 - this will allow you to override permissions as indicated by the gray button under No Access 