

Defining User Group Privileges and Organization Capabilities

Organizations

User belongs in a single organization

The Organization that a User belongs to establishes whether a User can:

- See specific browse flows (taxonomy)
- See specific media
- See the Cart
- See a PO or RFQ
- See pricing in the Cart
- See pricing in the BOM
- See Retail Pricing
- See Discount Pricing
- See Wholesale Pricing
- See Order History

✓ For integration projects only:

- Get Part Info from ERP
- Send Cart to ERP

User



- ✓ Name
- ✓ Username
- ✓ Password
- ✓ Enabled?

User Groups

User may belong to one or many user groups

The User Group that a User belongs to establishes:

- ✓ Which Media Categories a User can see
- ✓ What Privileges a User has, such as:
 - Ability to see the Cart
 - Ability to change Preferences
 - Ability to Print Interactive Media
 - Access to Admin Modules
 - Access to Publisher Module
 - Ability to Use Quick Publish
 - Ability to View or Add Related Media
 - Access to Reporting Module
 - Ability to View or Edit Comments
 - Ability to View or Edit Attachments
 - Ability to View Offline Content
 - Ability to Administrate all Orders
 - Ability to Administrate Org Specific Orders

What's in this Article?

Organization Capabilities	3
Overview	3
Available Organization Capabilities	3
ERP Capabilities	4
Pricing Capabilities	4
Shopping Cart Capabilities.....	5
Templates Capabilities	6
Reports Capabilities.....	6
User Group Privileges	7
Overview	7
Media Categories Privileges	8
Attachments Privileges.....	8
User Experience Privileges	8
Comments Privileges	9
Order Management Privileges (HTML Order Management only)	9
Modules Privileges	10
Pricing (Documoto Classic only)	14
Related Privileges	14
Shopping Cart Privileges (Documoto Classic only)	15
User Privileges	15

Organization Capabilities

Overview

The **Admin > Organization Admin** Module contains a 'Capabilities' section under each organization. This section allows Administrators to enable or disable certain privileges (i.e. capabilities) for a specified organization. The 'Capabilities' options are not inherited by an organization's child organization. This implies that a child organization may have a number of privileges enabled or disabled, and as such may have more or less than its parent. For a child organization to have the same capabilities as its parent, the same capabilities must be enabled for the child organization.

Available Organization Capabilities

SERVICESANDBOX
Manage Organizations
Miscellaneous
General
Capabilities
Style Editor
Part List Columns
Properties
Profile
Addresses
Users
Commerce
Commerce System
ERP System
ERP Headers
Classic Shopping Cart
Classic Quote Templates
HTML Order Management
Template Layout Override
Email Recipients

Capabilities

Order Management ☐ Disable Order Management Admin

ERP ☐ Enable Sync PO Address with ERP ☐ Disable Add Part to ERP Cart ☐ Enable Fetch Part Info From ERP
☐ Enable Send Shopping Cart to ERP

Pricing ☐ Display Discounted Price ☐ Display Prices in Parts List ☒ Display Prices in Shopping Cart
☒ Display Retail Price ☒ Display Wholesale Price ☐ Disable Hide Pricing Button

Shopping Cart ☐ Disable Shared Shopping Carts ☐ Disable Add to Shopping Cart Pricing from ERP ☐ Disable Add to Shopping Cart Qty Prompt
☒ Enable Shopping Cart ☐ Disable Shopping Cart Availability ☐ Disable Shopping Cart ETA from ERP
☐ Disable Classic Shopping Cart Import from XLS

Templates ☐ Disable HTML Order Template ☐ Disable HTML Quote Template ☒ Disable Classic Order Template
☒ Disable Classic Quote Template

Reports ☒ User Action Report ☒ Media Access Controls Report ☒ Orders Report
☒ Users Report ☒ Part Tag Report ☐ Tenant Usage
☒ Parts Created By Date/Product Report ☐ Model To Parts Report ☒ Where Used Report
☐ Manitou Log Ins Report ☐ Boart LY Part Tag Report ☐ Hotpoint Link Report
☒ TOC Data Report ☒ All Pages Report ☒ Who Took Content Offline
☒ Where Page Used Report ☒ Bill of Material by Book Report ☒ Page Part Tag Report (New)
☒ Where Part Used Report ☐ Users Free Text Report ☐ Parts Manuals Report
☐ Books Report

Save Cancel

Disable Order Management

Enabling the 'Disable Order Management' capability disables the option to submit orders through the shopping cart. This also disables all other Order Management options, such as viewing order history, cancelling or duplicating orders and any order management privileges a user may have through User Group privileges.

ERP Capabilities

Enable Sync PO Address with ERP

Enabling the 'Enable Sync PO Address with ERP' capability allows users to fetch address information in real-time when placing an order or quote in Documoto. This is only applicable when there is an integration between Documoto and the Digabit Customer's ERP system.

Disable Add Part to ERP Cart

Enabling the 'Disable Add Part to ERP Cart' capability disables the option to add parts to a third-party or external shopping cart. This is only applicable when there is an integration between Documoto and the Digabit Customer's Ecommerce site or external shopping cart.

Enable Fetch Part Info From ERP

Enabling the 'Enable Fetch Part Info From ERP' capability enables ERP information to be displayed in the 'Get Part Info' window and Bill of Materials list. This will only work if there is a systematic ERP integration between Documoto and the Digabit Customer's ERP system.

Enable Send Shopping Cart to ERP

Enabling the 'Enable Send Shopping Cart to ERP' capability enables the Send to ERP button in the shopping cart. ERP settings must be configured for customer's implementation of Documoto in order for the 'Send to ERP' button to function correctly. This setting should only be enabled after a full test of ERP integration has been performed and with guidance from the Digabit staff.

Pricing Capabilities

Display Discounted Price

Enabling the 'Display Discounted Price' capability enables discounted price information to be displayed in the 'Part Information' screen, which is accessible by clicking on the part number link. Discount prices must be configured for a part for it to display.

Display Prices in Parts List

Enabling the 'Display Prices in Parts List' capability enables price information (Discount, Retail or Wholesale) to be displayed in the Bill of Materials (BOM) or parts lists in pages. The BOM must be configured to include pricing columns.

Display Prices in Shopping Cart

Enabling the 'Display Prices in Shopping Cart' capability enables price information (Discount, Retail or Wholesale) to be displayed in the shopping cart. Prices must be configured for a part for pricing to display in the shopping cart.

Display Retail Price

Enabling the 'Display Retail Price' capability enables retail price information to be displayed in the 'Part Information' screen, which is accessible by clicking on the part number. Retail prices must be configured for a part for it to display.

Display Wholesale Price

Enabling the 'Display Wholesale Price' capability enables Wholesale price information to be displayed in the 'Part Information' screen, which is accessible by clicking on the part number. Wholesale prices must be configured for a part for it to display.

Disable Hide Pricing Button (Documoto Classic only)

Enabling the 'Disable Hide Pricing Button' capability disables the 'Pricing' button displayed at the top of the Documoto Classic screen next to 'Preferences.' Enabling this capability also removes all 'Hide Pricing' options from the 'Preferences' window, which is where users configure what prices to hide.

Shopping Cart Capabilities

Disable Shared Shopping Carts (Documoto Classic only)

Enabling the 'Disable Shared Shopping Carts' capability will disable users from sharing saved carts with other users, in other organizations, in the shopping cart. Note: Shared Shopping Carts are only available in Documoto Classic.

Disable Add to Shopping Cart Pricing from ERP

Enabling the 'Disable Add to Shopping Cart Pricing' capability will disable users from viewing part pricing within the shopping cart. This option only applies when there is an ERP integration already set-up that fetches part pricing from the Digabit Customer's ERP system.

TIP: The 'Disable Add to Shopping Cart Pricing' option does not apply to manually added or imported pricing. This capability relates only to ERP pricing. To disable shopping cart pricing for prices that appear in your Documoto instance, that are unrelated to ERP integrated pricing, disable the 'Display Prices in Shopping Cart' option under the **Pricing Capabilities** section.

Disable Add to Shopping Cart Qty Prompt

Enabling the 'Disable Add to Shopping Cart Qty Prompt' capability will disable the 'Add to Cart' dialog-box when 'Add to Cart' is selected. This option only applies to an organization when the 'Enable Add to Shopping Cart Qty Prompt' has been enabled for an entire tenant.

Enable Shopping Cart

Enabling the 'Enable Shopping Cart' capability will enable the shopping cart for a specified organization. If this option is **not** enabled, the shopping cart functionality will be disabled and so the Shopping Cart Manager (icon on the top right hand side of Documoto) will not exist in the UI and users will not be able to add parts to a shopping cart.

Disable Shopping Cart Availability

Enabling the 'Disable Shopping Cart Availability' capability will disable users from viewing part availability within the shopping cart. This option only applies when there is an ERP integration already set-up that fetches part availability from the Digabit Customer's ERP system.

Disable Shopping Cart ETA from ERP

Enabling the 'Disable Shopping Cart Availability' capability will disable users from viewing shopping cart ETA within the shopping cart. This option only applies when there is an ERP integration already set-up that fetches part availability from the Digabit Customer's ERP system.

Disable Shopping Cart Import from XLS

Enabling the 'Disable Shopping Cart Import from XLS' capability will disable the shopping cart import feature for a specified organization. This option only applies when shopping cart to an organization when the 'Enable Shopping Cart Import from XLS' capability has been enabled for an entire tenant.

Templates Capabilities

Before configuring Template Capabilities, evaluate which type of templates your tenant is currently utilizing.

- HTML Order Templates are configured under Tenant Admin > Template Layout
- HTML Quote Templates are configured under Tenant Admin > Template Layout

Note that only HTML templates can be used in Documoto Rocket.

Disable HTML Order Template

By default, the 'PURCHASE' button is enabled in the HTML shopping cart. By enabling the 'Disable HTML Order Template' capability, the 'PURCHASE' button in the shopping cart will not be available.

TIP: Although the 'PURCHASE' button is enabled by default, the button will not work unless an HTML template, of type 'order', is configured and set to 'Use as Default' (indicated by bold text in Tenant Admin > Template Layout).

Disable HTML Quote Template

By default, the 'REQUEST QUOTE' button is enabled in the HTML shopping cart. By enabling the 'Disable HTML Order Template' capability, the 'REQUEST QUOTE' button in the shopping cart will not be available.

TIP: Although the 'REQUEST QUOTE' button is enabled by default, the button will not work unless an HTML template, of type 'quote', is configured and set to 'Use as Default' (indicated by bold text in Tenant Admin > Template Layout).

Reports Capabilities

Note: See our article on 'Documoto Reports' for detailed descriptions of the contents of all of the available reports in Documoto.

User Action Report

Allows users in the specified organization to view the 'User Action Report,' under the condition that the user is assigned to at least one User Group with 'Reporting' module privileges.

Media Access Controls Report

Allows users in the specified organization to view the 'Media Access Controls Report,' under the condition that the user is assigned to at least one User Group with 'Reporting' module privileges.

Orders Report

Allows users in the specified organization to view the 'Orders Report,' under the condition that the user is assigned to at least one User Group with 'Reporting' module privileges.

Users Report

Allows users in the specified organization to view the 'Users Report,' under the condition that the user is assigned to at least one User Group with 'Reporting' module privileges.

Part Tag Report

Allows users in the specified organization to view the 'Part Tag Report,' under the condition that the user is assigned to at least one User Group with 'Reporting' module privileges.

Who took Content Offline Report

The Who Took Content Offline report displays which users have taken content offline within a specified date range.

Where Page is Used Report

The Where Page is Used report displays which books contain a page by specifying the page filename.

Bill of Material by Book Report

The Bill of Material by Book report displays a sum of bill of materials quantities, from all parts, in all pages, within a specified media identifier.

Page Part Tag Report

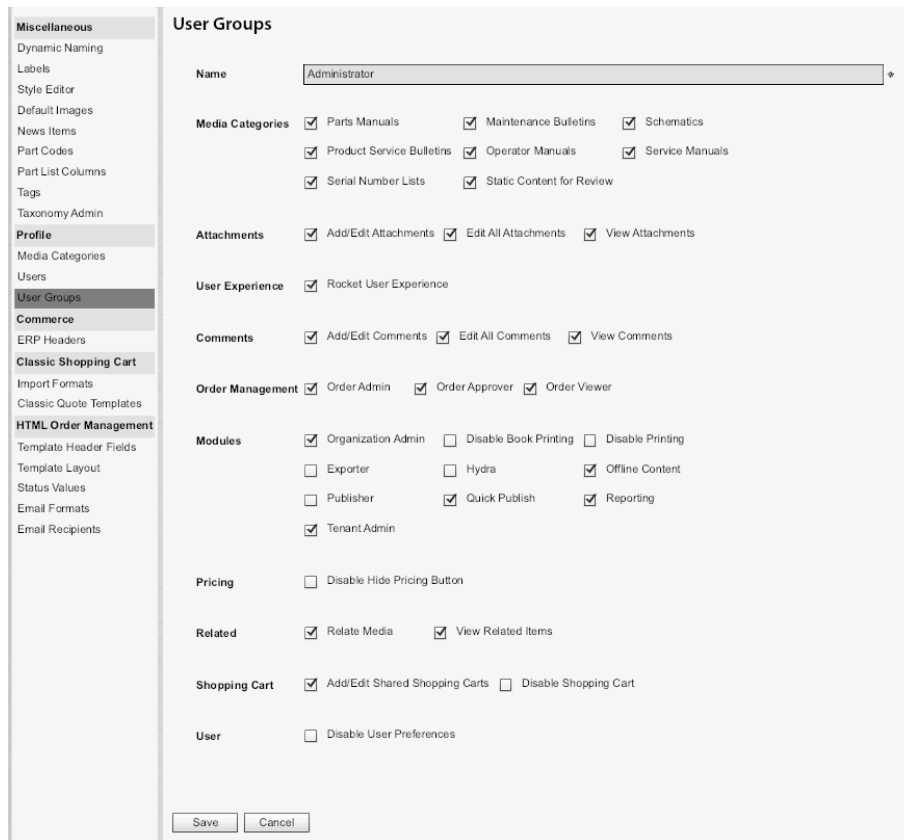
The Page Part Tag report displays all parts within a media identifier. If desired, you can select the report to display global or local part tags. The report supports filtering on specific tag names, tag values or supplier key.

User Group Privileges

Overview

The **Admin > Tenant Administration > Profile > User Groups** Module contains Privileges sections which allow Tenant level Administrators to configure certain privileges and viewing rights for a specified user group. By default, a newly created User Group will have no privileges or viewing rights. In order to set privileges, viewable media categories and available modules for a user group, the user must be a member of a user group that has the 'Tenant Admin' module enabled.

Available User Group Privileges



User Groups

Name: Administrator

Media Categories

- ☒ Parts Manuals
- ☒ Maintenance Bulletins
- ☒ Schematics
- ☒ Product Service Bulletins
- ☒ Operator Manuals
- ☒ Service Manuals
- ☒ Serial Number Lists
- ☒ Static Content for Review

Attachments

- ☒ Add/Edit Attachments
- ☒ Edit All Attachments
- ☒ View Attachments

User Experience

- ☒ Rocket User Experience

Comments

- ☒ Add/Edit Comments
- ☒ Edit All Comments
- ☒ View Comments

Order Management

- ☒ Order Admin
- ☒ Order Approver
- ☒ Order Viewer

Modules

- ☒ Organization Admin
- ☐ Disable Book Printing
- ☐ Disable Printing
- ☐ Exporter
- ☐ Hydra
- ☒ Offline Content
- ☐ Publisher
- ☒ Quick Publish
- ☒ Reporting
- ☒ Tenant Admin

Pricing

- ☐ Disable Hide Pricing Button

Related

- ☒ Relate Media
- ☒ View Related Items

Shopping Cart

- ☒ Add/Edit Shared Shopping Carts
- ☐ Disable Shopping Cart

User

- ☐ Disable User Preferences

Save Cancel

Media Categories Privileges

The media categories, that users will have access to are set by the user groups that they are assigned to. Each option in the 'Media Categories' privileges section represents a media category in a company's library. Enabling any of the 'Media Categories' check boxes will allow users assigned to the specified user group to access the corresponding media category.

TIP: The 'Media Categories' privileges only enables the shelf itself. In order to allow users to access specific books or media, the 'Access Controls' for that book or media item must be set-up through the 'Publisher' module. Similarly, if an organization has been granted access to certain books or media through the 'Publisher' module, but the users within that organization are not assigned to a 'User Group' with 'Tenant Admin' privileges to view the 'Media Categories' that the books or media are contained in, users will not be able to view the category in their library to find media.

Attachments Privileges

Attachments privileges enable user groups the ability to view, edit or add attachments. Attachments are found in the 'Related Items' window and can be found at the part, page, chapter or book level. Attachments are related external files or thumbnails. Related Items and Attachments can be found by clicking on the hierarchy icon within a BOM, or in the page, chapter or book navigation ("bread-crumbs") bar.

Add/Edit Attachments

Enabling the 'Add/Edit Attachments' privilege will provide users within the specified user group the ability to add, edit and remove their own attachments. This privilege does not enable privileges to edit or remove any other user's attachments.

TIP: A user which is a member of a user group with the 'Add/Edit Attachments' privilege enabled will be able to make attachments within the system, but will not be able to make cross-link related media within the system (the 'Relate Media' privilege must be enabled to create cross-links as related media).

NOTE: Current functionality is that attachments are NOT accessible across all organizations. Only the organization itself, parent and the child organizations will be able to view an attachment made with the 'Add/Edit Attachments' privilege enabled, so long as the organization of kin has access controls to the item containing the attachment. (TIP: In order for child organizations to view an attachment, always enable the 'Public' option when relating media!)

Edit All Attachments

Enabling the 'Edit All Attachments' privilege will provide users within the specified user group the ability to edit or remove any user's attachments.

View Attachments

Enabling the 'View Attachments' privilege will grant all users that are members of the user group containing this privilege to be able to view attachments.

TIP: A user group with the 'View Attachments' privilege will not be able to view related media (cross-linked media) in the 'Related Items' view unless they also have the 'View Related Items' privilege enabled.

User Experience Privileges

User Experience privileges enable groups of users to access to the Documoto Rocket user interface.

Rocket User Experience

Enabling the 'Rocket User Experience' privilege will enable the Documoto Rocket interface for all users in the group. To use Documoto's Classic interface, leave this privilege unchecked.

Comments Privileges

Comments privileges enable user groups the ability to view, edit or add comments. Comments can be found at the part, page, chapter or book level. Comments are written statements added to media, which are viewable in a separate 'Comments' window. Comments can be found by clicking on the double-cloud/comment icon in the BOM, or in the page, chapter or book navigation ("bread-crumb") bar.

Add/Edit Comments

Enabling the 'Add/Edit Comments' privilege will provide users within the specified user group the ability to add, edit and remove their own comments. This privilege does not enable privileges to edit or remove any other user's comments.

NOTE: Current functionality is that comments are NOT accessible across all organizations. Only the organization itself, parent and the child organizations will be able to view a comment made with the 'Add/Edit Comments' privilege enabled, so long as the organization of kin has access controls to the item containing the attachment. (TIP: In order for child organizations to view a comment, always enable the 'Set as Public' option when adding the comment!)

Edit All Comments

Enabling the 'Edit All Comments' privilege will provide users within the specified user group the ability to edit or remove any user's comments.

View Comments

Enabling the 'View Comments' privilege will grant all users that are members of the user group containing this privilege to be able to view comments.

Order Management Privileges (HTML Order Management only)

Order Management privileges enable user groups to view & administrate orders created through the HTML Order Management module in Documoto.

Order Admin

Enabling the 'Order Admin' privilege will grant all users that are members of the user group containing the privilege the ability to administrate any order that is submitted across the entire tenant. Users with this privilege will see all orders submitted by all users in any organization within the tenant when they view they open the 'Orders' module.

Order Approver

Enabling the 'Order Approver' privilege will grant all users that are members of the user group containing the privilege the ability to administrate orders submitted by users in their organization and child organizations. Users with this privilege will see orders submitted by all users in their organization and child organizations of their organization when they view they open the 'Orders' module. Order Approvers cannot administrate or view orders submitted by sibling organizations.

TIP: The 'Order Management' privileges only enable the administration of order management. In order to allow users to administrate orders in the Order Management module, the organization that a user belongs to cannot have Order Management disabled.

Order Viewer

Enabling the 'Order Viewer' privilege will grant all users that are members of the user group containing the privilege the ability to view their submitted orders and orders submitted by other users in their organization.

NOTE: if no ecommerce privileges are enabled, a user will have the ability to view only their submitted orders.

Modules Privileges

Organization Admin

Enabling the 'Organization Admin' privilege will grant all users that are members of the user group containing this privilege to have access to the Administration Module. Once enabled, the Organization Administration Module can be accessed by clicking on Admin > Organization Admin towards the top right-hand side of Documoto. A user that has access to this Administration Module will have access to the following Administration Module Sections:

1. **Manage Organizations:** The 'Manage Organizations' button leads to the manage organizations window. This section is where a user can create new organizations, as well as edit parent level organization assignments.
2. **Miscellaneous**
 - a. **General:** In 'General' users can edit organization names, add or change organization parents, set the "DMZ Expiration Period and copy Access Controls from another organization.
 - i. Note: the 'Copy Access Controls' feature can only be used **once** per Organization.
 - b. **Capabilities:** As described earlier in this article, this section contains all of the options for disabling and enabling organization level capabilities.
 - c. **Style Editor:** Organization-specific logos, imagery and branding can be defined using the Style Editor.
 - d. **Part List Columns:** Where administrators can customize the visibility, order and minimum width (in pixels) of part columns for a specific organization.
 - e. **Properties:** The 'Properties' section is where a user can define values for organization level properties. Currently, the available properties for an organization are:
 - i. Default Currency Code
 - ii. Availability and Price Mapping (ERP Integrations only)
 - iii. Override SVG Opacity (Documoto Classic only)
 - iv. Shopping Cart Price Column Order
 - v. Add to Cart Qty Behavior
 - vi. Ignore Access Controls (Documoto Rocket only-this will show all media in the library, but if a user opens media they do not have Access Controls for, they will get an error message)
3. **Profile**
 - a. **Addresses:** The 'Addresses' section is where a user can add, edit or remove Addresses for an organization. Each organization can have its own addresses. These addresses will be available

to be chosen from a listbox when creating or editing a user's information (from the 'Users' section).

- b. **Users:** The 'Users' section is where a user can create or edit information for a user. The 'Users' section is also where a user can be enabled or disabled, as well as assigned to specific user groups.

4. Commerce

- a. **Commerce System:** The 'Commerce System' section is used by the Digabit team to enable or disable a commerce service.
- b. **ERP System:** The 'ERP System' section is used by the Digabit team to enable or disable an ERP service.
- c. **ERP Headers:** Headers are configured by Digabit engineers when establishing an Integration between Documoto and a customer back-end ERP system.

5. Shopping Cart (Documoto Classic only)

- a. **Quote Templates:** The 'Quote Templates' section is where a user can create, edit or remove Request for Quote templates for the Shopping Cart for the specified organization. If a tenant defined RFQ template exists, then the user can also clone the tenant template to the organization. If the organization is operating under a different locale, the Request for Quote template can be customized by language.

6. Order Form (HTML Order Management Only)

- a. **Layout Override:** The 'Layout Override' section is where users can override tenant-defined HTML Order or Quote forms for a specific organization.
- b. **Order Email Recipients:** The 'Order Email Recipients' section is where users can override the tenant-defined order status notifications & the defined email recipients for a specific organization.

Publisher

Enabling the 'Publisher' Module privilege will grant all users that are members of the user group containing this privilege to have access to the Publisher Module and the ability to log into and utilize Docustudio for authoring. Once enabled, the Publisher Module can be accessed by clicking on Admin > Publisher towards the top right hand side of Documoto. A user who has access to the Publisher Module will have access to all Publisher Module sections including: **Process Content, Media Manager, Page Manager, Parts Manager, Template Manager and Print Settings.**

Tenant Admin

Enabling the 'Tenant Admin' privilege will grant all users that are members of the user group containing this privilege to have access to the Administration Module. Once enabled, the Tenant Administration Module can be accessed by clicking on Admin > Tenant Admin towards the top right hand side of Documoto. A user that has access to this Administration Module will have access to the following Administration Module Sections:

1. Miscellaneous

- a. **Dynamic Naming:** Dynamic naming formats allow tag substitution into the displayed names of entities.
- b. **Labels:** The 'Labels' section is where a user can create or remove custom defined labels for certain buttons and text within the UI. In other words, users could replace the Documoto

standard label of 'Book' with something customized, such as 'Catalog.' Some of the Label Keys for which a custom defined display value can be entered are:

- Book
 - Chapter
 - Page
 - Part
 - CartTab
 - Order
 - RFQ
 - ERP
 - QuickAddUnkownBook
 - Price Labels
- b. **Style Editor:** Default tenant-level logos, imagery and branding can be set in the 'Style Editor'.
 - c. **Default Images:** Default user-interface images, such as a default part image, can be set in the 'Default Part Images' area.
 - d. **New Items:** The 'News Items' section is where a user can create, edit or remove a news item (text, link or file). This section is also where a user can define which organizations have access to which news item bulletins. Required readings are managed under the 'News Items' section as well.
 - e. **Part Codes:** The 'Part Codes' section is where a user can create part codes (ex. OBS for "Obsolete"). Part Codes are global across all organizations for a tenant.
 - f. **Part List Columns:** Where administrators can customize the visibility, order and minimum width (in pixels) of part columns for the tenant.
 - g. **PGP Key:** The 'PGP Key' section is used by the Digabit team to encrypt PO and RFQ cart submissions.
 - h. **Tags:** The 'Tags' section is where a user can add, edit or remove tag tags. Tags can be managed in this section by display order, entity type (where tag is applicable), searchable, input type and tag properties.

2. Profile

- a. **Media Shelves:** The 'Media Shelves' section is where a user can create, edit or remove Media Shelves, or 'Media Categories' (Documoto Rocket). A user can also assign an owner to a media category by adding an email address to the email field, which results in a new (!) icon added to the icon bar when a media is open, which allows end users to send feedback to the specified owner (email address) of a media category.
- b. **User Groups:** As described in this article, the 'User Groups' section contains Privileges the can be enabled or disabled, which allow Tenant level Administrators to configure certain privileges and viewing rights for a specified user group.

3. Commerce

- a. **ERP Headers:** Headers are configured by Digabit engineers when establishing an Integration between Documoto and a customer back-end ERP system.

4. Shopping Cart (Documoto Classic only)

- a. **Import Formats:** The 'Import Formats' section is where a user can create and edit shopping cart import formats. Multiple import formats can be configured, and will be available in the

shopping cart to users under any organization with shopping cart and import formats capabilities.

- b. **Quote Templates:** The 'Quote Templates' section is where a user can create, edit or remove Request for Quote templates for the Shopping Cart for the specified organization. If an organization specific RFQ template exists it will override the tenant level template in that organization. If the tenant is operating under multiple locales, the Request for Quote template can be customized by language.

Exporter

Enabling the 'Exporter' Module privilege will grant all users that are members of the user group containing this privilege access to the 'Exporter' Module. The options available in the Exporter module are configured for clients by the Digabit Engineering team based on a customer's need to export book information from Documoto into an archive or another software system. The Exporter module should not be made available to any user groups unless it has been setup and configured for use.

Quick Publish

Enabling the 'Quick Publish' Module privilege will grant all users that are members of the user group containing this privilege to be able to utilize the Quick Publish button. The Quick Publish button is available when a user is in the Library section of Documoto, and has a Media Category selected. The Quick Publish button appears as an 'Add Book' button towards the top of the page, to the left of the layout buttons (Tile, List, Grid, and Flow). The Quick Publish button allows a user to quickly to add a new file to the selected Media Category by browsing to a file on their local hard drive, filling out Documoto fields, and uploading it as a new media to the system.

Disable Book Printing

Enabling the 'Disable Book Printing' Module privilege will disable users that are members of the user group containing this privilege from printing interactive parts books. The print button will be disabled for users in groups with this privilege enabled at the book level only. This option does not disable the ability to print interactive parts pages or chapters, but only interactive books or media item types of 'Books' in their entirety.

Disable Printing

Enabling the 'Disable Printing' Module privilege will disable users that are members of the user group containing this privilege from printing or downloading any interactive or static media. The export button will be disabled on any interactive (pages, chapters and books) and download button will be disabled on any static media items.

Offline Content

Enabling the 'Offline Content' Module privilege will grant all users that are members of the user group containing this privilege to be able to drag content the Offline Shelf. The Offline Shelf will only be available to users if they are a member of a user group which has this privilege enabled. The offline content shelf allows users to place media in it by dragging the media to it (or using the copy to offline shelf button in a Media's Additional Info Dialog Box) and then allows the user to download the media to be opened and viewed within the Documobile or Docuview applications.

TIP: In order for a media to be able to be taken offline, it must have the Offline Enabled property set to true (this can be set in the Admin > Publisher > Publish Media module by selecting a media and checking off the 'Offline Enabled?' checkbox in the 'Media Properties' panel).

Reporting

Enabling the 'Reporting' Module privilege will grant all users that are members of the user group containing this privilege to be able to access the Reporting Module, which is accessible via the Admin drop-down on the top right of the Documoto window.

TIP: Enabling the Reporting Module by itself will give the users of a user group access to the module, but the user will not be able to run any reports unless the reports are also chosen to be available in the 'Organization Capabilities' options under the 'Organization Admin' Module for the organization which the user group belongs to.

Pricing (Documoto Classic only)

Disable Hide Pricing Button

By default, the hide 'Pricing' button is enabled. Enabling the 'Disable Hide Pricing Button' privilege disables the 'Pricing' button displayed at the top of the Documoto screen next to 'Preferences.' Enabling this privilege also removes all 'Hide Pricing' options from the 'Preferences' window, which is where users configure what prices to hide.

TIP: Although the hide 'Pricing' button is considered enabled by default at the User Group Level, there is an Organization Level capability titled 'Disable Hide Pricing Button,' and if this is enabled then the user belonging to that user group will still not be able to view the 'Pricing' button in Documoto, regardless of this User Group privilege setting.

Related Privileges

Related privileges enable user groups the ability to view, edit or add related media. Related Media are found in the 'Related Items' window and can be found at the part, page, chapter or book level. Related Media are media in the system that are cross-linked to another media, book, chapter, page or part. Related Media and Attachments can be found by clicking on the hierarchy icon within a BOM, or in the page, chapter or book navigation ("bread-crumbs") bar.

Relate Media

Enabling the 'Relate Media' privilege will grant all users that are members of the user group containing this privilege to be able to relate media (cross -linked media in the system between a media, book, chapter, page or part and another media item).

TIP: A user which is a member of a user group with the 'Relate Media' privilege enabled will be able to cross link media within the system, but will not be able to add attachments (the 'Add/Edit Attachments' privilege must be enabled to add attachments as related media).

NOTE: Current functionality is that cross linked related media (not attachments) is accessible across all organizations, including children, siblings and parents, so long as the organization of kin has access controls to the related item!

View Related Items

Enabling the 'View Related Items' privilege will grant all users that are members of the user group containing this privilege to be able to view related media (cross -linked media in the system between a media, book, chapter, page or part and another media item.)

TIP: A user group with the 'View Related Items' privilege will not be able to view attachments (related external media or thumbnails) in the 'Related Items' view unless they also have the 'View Attachments' privilege enabled.

Shopping Cart Privileges (Documoto Classic only)

Add/Edit Shared Shopping Carts

By default, the ability to add/edit shared shopping carts is not enabled for users. Enabling the 'Add/Edit Shared Shopping Carts' privilege will enable the shared shopping cart functionality in the shopping cart.

TIP: The ability to create and distributed shared saved carts should be considered an administrative function. This is because users with this privilege will have access to your organization structure through 'Access Privileges' in shared carts.

Disable Shopping Cart

By default, the shopping cart is enabled. Enabling the 'Disable Shopping Cart' privilege will disable the shopping cart functionality and so the Shopping Cart Manager (icon on the top right hand side of Documoto) will not exist in the UI and users will not be able to add parts to a shopping cart.

TIP: Although the Shopping Cart is considered enabled by default at the User Group Level, there is an Organization Level Privilege titled 'Enable Shopping Cart', and if this is not enabled, then the user of a user group will not be able to view the shopping cart, regardless of this User Group privilege setting.

User Privileges

Disable User Preferences

Enabling the 'Disable User Preferences' privilege will disable the Preferences Module for any user that is a member of a user group with this privilege enabled. Users that are members of a user group with the 'Disable User Preferences' enabled will disallow users from setting their own preferences including:

- Miscellaneous
 - Locale
 - Password Reset
- Library (Documoto Classic only)
 - Default Shelf
 - Default Search View
 - Show Shelf Filters
- Books (Documoto Classic only)
 - Show Table of Contents
 - Diagram Layout
 - Show Diagram Navigator
 - Zoom in on Callout
 - Part List Columns