

# Insight Permissions Guide

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# Permissions Guide

## Insight Permissions A-Z with Descriptions

Permission	Description
AdministerPredictModule	Create and manage Predict projects
AdministerReviewModule	Create and manage Review projects
BatchDocuments	Batch documents by field for Dynamic Folder review or into Static Folders
BatchPrint	Combine documents into a combined PDF or ZIP file
BulkConvert	Convert documents to PDF in bulk via Results page
BulkOCR	Run OCR on image records in bulk via Results page
BulkUpdate	Apply coding to several documents at once using the Bulk Update Wizard
CanResubmitFailedJobs	Resubmit any failed job
CanSeeOtherUsersJobs	View other users' jobs in Reports
CanUseMoreLikeThis	Highlight up to 5,000 characters in a record to perform a More-Like-This BodyText search
CompareFolders	Compare the contents of one folder to another folder
ConverttoPDF	Create a PDF version of a document for redaction purposes
CreatePredictDatabase	In Collections, create a Predict database for a collection
DeleteDocument	Permanently delete documents from site
DownloadNative	Download the native version of a record
EditDisplayForms	Create and manage personal display forms in the Results page. This is a basic user permission; when given with the UseAdmin permission, the user can add and edit default Results page displays
EditReviewForms	Create and edit Review forms used for coding
Export	Create data export reports
LockDocuments	Make documents read-only or remove read-only status
ManageOtherUserJobs	Delete jobs created by other users
ManagePublicFolders	Create and manage folders for any existing Public Folder
ManageSupportTickets	Access support tickets through the ticketing portal
OverrideCheckTextforOCR	Override checking for existing text when documents are submitted for OCR. Role must also have the BulkOCR permission

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OverrideLockedDocuments	Make changes to locked documents during bulk updating. Role must also have the BulkUpdate permission
OverwritePDFforConversion	Overwrite a PDF version of a document with the new PDF converted by Catalyst. Role must also have the BulkConvert permission
OverwritePDFforOCR	Re-OCR and PDF records that have been OCR'd by Catalyst
Redact	Redact documents
RemoveSharedFolder-Permissions	Remove a shared folder created by another user
ReplaceBodyTextFrom-ConvertedPDF	In Bulk Convert wizard, allows users to replace the document's text with the text taken from the PDF version during bulk conversion. Role must also have the BulkConvert permission
ReplacePDF	Replace the PDF version of a record that was created using Convert to PDF within the document page. Role must also have the BulkConvert permission
TagPreviousData	Apply coding (tagging) to the current document from the previously saved document
TranslateDocuments	Send documents for professional translation
UpdateSubcollection	Move documents among different collections / matters
UseAdmin	Access to Administrative features. Must have this permission to use administrative permissions
UseAdminCaseAdmin	Edit site settings
UseAdminCaseFields	Manage fields
UseAdminCollections	Create, edit, and delete collections
UseAdminExtensionTypes	Manage extension types and associate viewers used to display the types
UseAdminFieldAliases	Create, edit, and delete Field Aliases available in the Field Name menu
UseAdminFolderViews	Create and manage Dynamic Folders
UseAdminFormsAdmin	Create and manage review forms
UseAdminHighlightWords	Manage static highlights
UseAdminLinkedDocuments	Manage the mechanism that associates documents (related, duplicates, produced versions, etc.)
UseAdminLookupAdmin	Create and manage values available in field lookup tables

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UseAdminRedactionAdmin	Create and manage redaction labels and sets
UseAdminRolesAdmin	Create and manage roles and their associated forms and permissions
UseAdminSearchAliases	Add, edit, and delete Search Aliases.
UseAdminSearchFields	Add, edit, and delete fields that appear in the Filtered List and the Field Name menu in Search Assist
UseAdminSecurityViews	Manage security groups for private field sites
UseAdminUserAdmin	Access to User Administration; view and add users (Must also have UserAdminAddUsers to edit users)
UseAdminViewers	Manage the viewers used to view documents
UseAutoRotateforOCR	Apply auto-rotating when submitting documents for Bulk OCR. Role must also have the BulkOCR permission
UseColorforOCR	OCR documents in color as well as grayscale. Role must also have the BulkOCR permission
UseDashboard	Access to the Dashboard page
UseDiagnosticViewer	Access to troubleshooting tools
UseDynamicFolders	Access to dynamic folders
UseFailPrintJobonConversion	Fail a print job if any document in the batch print job fails. Role must also have the BulkConvert permission
UseFolders	Access to Folders menu
UseLiveSupport	Access to chat online with the Catalyst support team
UsePrivateFolder	Create, edit, and delete private folders (MyFolders) and copy documents to them
UseProcessing	Access to processing reports in Monitors & Reports
UseProductions	Create Production Folders, copy documents to these folders, and run productions
UsePublicFolder	Create, edit, and delete Public Folders and copy documents to these folders
UserAdminAddUser	Add and edit users
UseReviewModule	Access to review projects, stages, and documents
UseSearch	Access to the Search menu
UseSharedFolder	Access to folders shared with you by others

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UseTranslation	Ability to highlight up to 5,000 words in the Preview (html or text) version of a document and perform a quick translation
UseUploads	Access to Uploads reports in Monitors & Reports
ViewAuditReports	Access Document Audit Trail and User Audit Trail reports in Reports
ViewDocHistory	Ability to view the history of changes made to a document
ViewNonIndexedDocs	Access to information about non-indexed documents in Reports

## Insight Permissions Standard Examples

### General Permissions:

BatchPrint, CanSeeOtherUserJobs, CanUseMoreLikeThis, CopytoFolder, DownloadNative, EditDisplayForms, Export, ManageSupportTickets, TagPreviousData, TranslateDocuments.

### Administrative Permissions:

AdministerPredictModule, AdministerReviewModule, BatchDocuments, BulkUpdate, CreatePredictDatabase, DeleteDocument, EditReviewForms, LockDocuments, ManageOtherUserJobs, ReplacePDF, UpdateSubcollection, \*UseAdmin, UseAdminAddUser, UseAdminCaseAdmin, UseAdminCaseFields, UseAdmin Collections, UseAdminExtensionTypes, UseAdminFieldAliases, UseAdminFolderViews, UseAdminFormsAdmin, UseAdminHighlightWords, UseAdminLinkedDocuments, UseAdminLookupAdmin, UseAdminRedactionAdmin, UseAdminRolesAdmin, UseAdminSearchAliases, UseAdminSearchFields, UseAdminSecurityViews, UseAdminUserAdmin, UseAdminViewers.

### Conversion/OCR Permissions:

BulkConvert, BulkOCR, CanResubmitFailedJobs, ConverttoPDF, OverrideCheckTextforOCR, OverrideLockedDocuments, OverwritePDFforConversion, OverwritePDFforOCR, ReplaceBodyTextFromConvertedPDF, UseAutoRotateforOCR, UseColorforOCR, UseFailPrintJobonConversion.

### Folder Permissions:

CompareFolders, ManagePublicFolders, RemoveSharedFolderPermissions, UseDynamicFolder, UseFolders, UsePrivateFolder, UsePublicFolder, UseSharedFolder.

# Permissions Guide

## **Reporting Permissions:**

UseProcessing, UseUploads, ViewAuditReports, ViewDocHistory,  
ViewNonIndexedDocs.

## **Catalyst-Only Permissions:**

UseAdminViewers, UseDiagnosticViewer.

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