



User Permissions

Help Guide

Note: The enhanced feature described in this guide is scheduled for release on 27th March 2025. This document is intended to enable you to prepare for the changes ahead and circulate information to your system administrators.

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1. Smarter Drafter Permissions

Smarter Drafter Permissions are used to define user access to **folders**, **documents** and **system functions**.

Users with the **Permission Management** function enabled under [Admin Permissions](#) can customize permissions for new and existing users. This can be done either at the individual user level or using a **Permission Set**, which can be assigned to multiple users.

2. About Permission Sets

Permission Sets are a predefined configuration of access and system functions. Once created, they can be assigned to one or more users. Any updates made will be applied to all users assigned to the permission set automatically.

2.1 Default Permission Sets

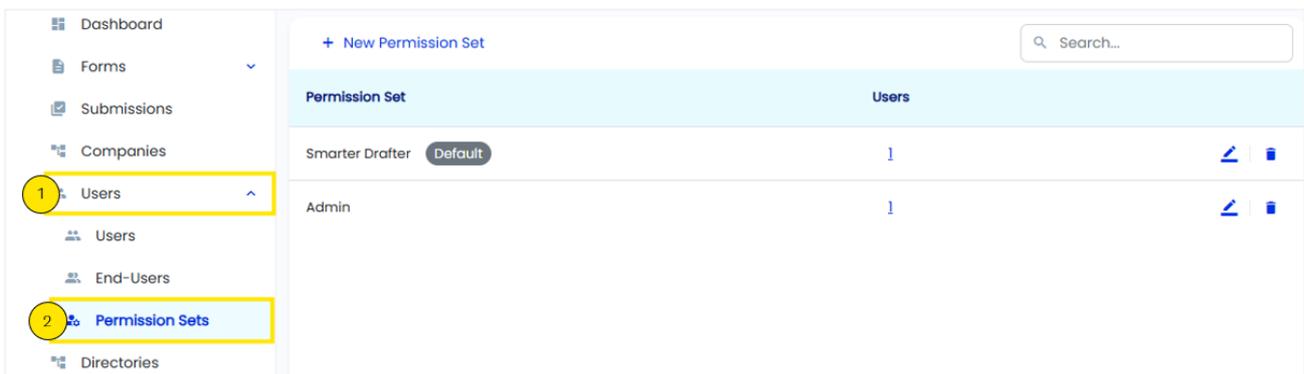
Smarter Drafter Pro will have the following pre-configured permission sets available on every tenant:

- **Admin** - grants access to all admin functions.
- **Builder** - grants access to all builder functions for new documents created by anyone with this permission set.
- **Filler** - allows user(s) to generate published documents.
- **Clause Bank Builder** - allows user(s) to add clauses to the Clause Bank.
- **Clause Bank User** - grants access to all published clauses in Clause Bank.
- **Clause Bank Reviewer** - allows user(s) to approve, reject and publish new clauses added to the Clause Bank.

3. Create a Permission Set

Permission Sets are located under **Users** from the navigation menu on the left. To create a new Permission Set:

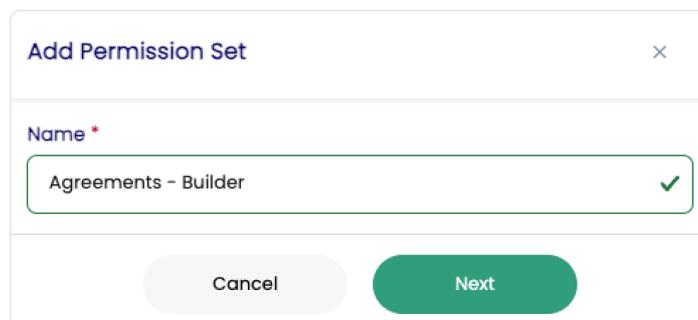
1. Click **Users**,
2. Click **Permission Sets** and
3. Click **+ New Permission Set**



3.1 Name the Permission Set

The name of the Permission Set should reflect the users and their intended purpose within the system. Once created, permissions can be configured across all [Permission Categories](#) for that set.

For example, when defining permissions for a group of users who are responsible for building Agreements, the Permission Set name could be "Agreements - Builder".



The screenshot shows a dialog box titled 'Add Permission Set' with a close button (X) in the top right corner. It has a 'Name *' label and a text input field containing 'Agreements - Builder' with a green checkmark on the right. At the bottom are two buttons: 'Cancel' and 'Next'.

3.2 Permission Categories

All system functions can be configured and granted from the following categories:

1. **Builder** - contains all the permissions related to building document automations
2. **Filler** - contains all the permissions for granting access to published forms for generating documents
3. **Clause Bank** - contains all the permissions for the Smarter Drafter Pro Clause Bank
4. **Admin** - contains all the system administration permissions

3.3 Builder Permissions

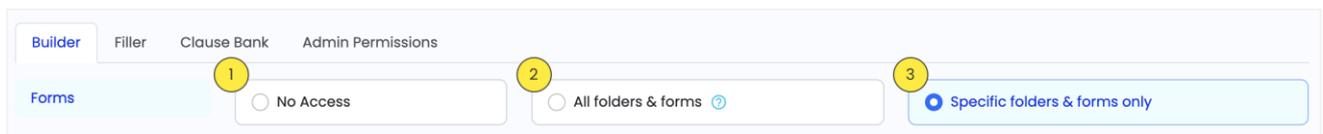
Under the **Builder tab**, there are 3 sub-categories:

1. Forms
2. Global Forms
3. Application Settings

3.3.1 Builder Permissions: Forms

There are three options for granting **Builder** permissions to **Forms**:

1. **No Access**: when selected, the user will not have access to build document automations and the *Forms > Build* option will not be available from the side navigation menu.
2. **All forms & folders**: when selected, the user will have *unlimited* builder access. This grants them access to *all* builder functions for all existing and new documents.
3. **Specific folders & forms**: when selected, specific system functions can be enabled at a folder and/or form level.

A screenshot of the 'Builder' permissions configuration interface. At the top, there are four tabs: 'Builder', 'Filler', 'Clause Bank', and 'Admin Permissions'. The 'Builder' tab is active. Below the tabs, there are three radio button options for granting permissions to 'Forms'. The first option is 'No Access', marked with a yellow circle containing the number '1'. The second option is 'All folders & forms', marked with a yellow circle containing the number '2'. The third option is 'Specific folders & forms only', marked with a yellow circle containing the number '3' and is currently selected with a blue dot.

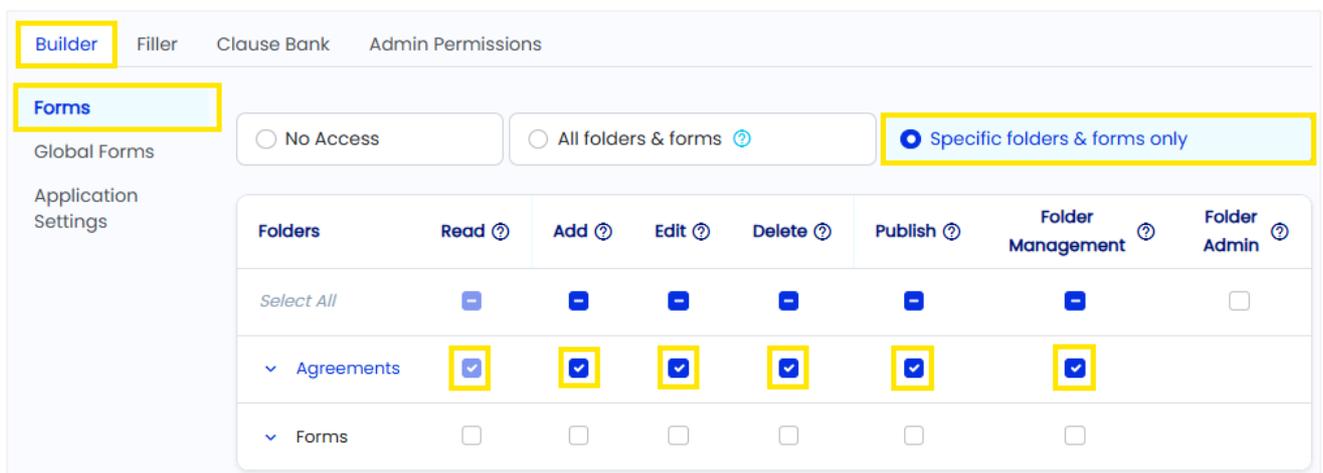
3.3.2 Builder System Functions

When **Specific folders & forms only** is selected, a table will appear with the following system functions that can be granted at a folder* and/or form level:

- **Read** allows users to view a document in build mode.
- **Add** (folder-level only) - allows users to add new forms to that folder and respective sub-folders.
- **Edit** allows users to edit existing documents.
- **Delete** - allows users to delete existing documents.
- **Publish** - allows users to publish existing documents.
- **Folder Management** (folder-level only) - allows users to edit and delete the folder; and add, edit and delete sub-folders within it. This does not allow users to create new parent folders.
- **Library Admin** - allows users to add, edit and delete *new* parent folders and grants them full control of the forms and sub-folders within them.

Note: Library Admin does not automatically grant users access to *existing* parent folders.

Note: When granting permissions at the folder level, all existing sub-folders and forms within that folder will inherit the selected permissions. When new forms and/or sub-folders are created within that folder, they will also inherit the permissions granted from that folder.



Folders	Read ?	Add ?	Edit ?	Delete ?	Publish ?	Folder Management ?	Folder Admin ?
Select All	<input type="checkbox"/>	<input type="checkbox"/>					
Agreements	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Forms	<input type="checkbox"/>	<input type="checkbox"/>					

Note: Save your work as you complete each screen to avoid losing inputs.

3.3.3 Builder Permissions: Global Forms

The same Builder System functions mentioned in [Section 3.3.2](#) can be set for Global Forms.

In this example, the users has been granted **Library Admin**, which grants them full control to create *new* Global Form folders and forms, however, they do not have access to the *existing* "Confidential Folder".

Builder Filler Clause Bank Admin Permissions								
Forms								
Global Forms	Folders	Read	Add	Edit	Delete	Publish	Folder Management	Folder Admin
Application Settings	Select All	<input type="checkbox"/>	<input checked="" type="checkbox"/>					
	Confidential Folder	<input type="checkbox"/>						

3.3.4 Builder Permissions: Application Settings

Application Settings under the Builder tab displays a list of builder-related functions. These functions are available to Builders with **add** and **edit** access at a *form level*, however, when enabled from here, the user will be able to view and manage these functions at the *application level* e.g. when 'Option Sets' is enabled from here, the user can view and manage *all* option sets used throughout *all* forms. In this example, these users will have permission to edit options sets and snippets, but no permission on other features.

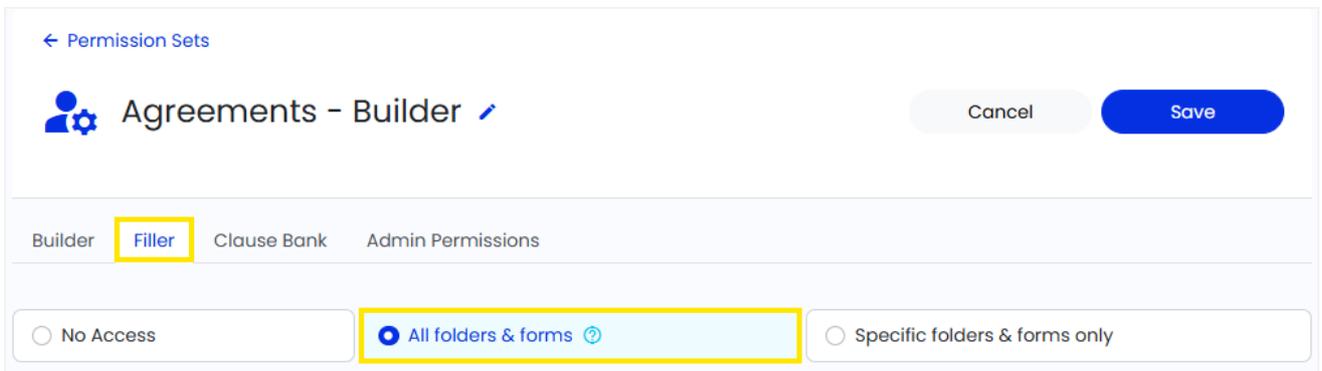
Builder Filler Clause Bank Admin Permissions	
Forms	
Global Forms	
Application Settings	Select All <input checked="" type="checkbox"/>
	Option Sets <input type="checkbox"/>
	Replacement Rules <input checked="" type="checkbox"/>
	Template Styles <input type="checkbox"/>
	Snippets <input checked="" type="checkbox"/>
	Form Settings <input type="checkbox"/>
	Field Alias <input type="checkbox"/>
	Form Roles <input type="checkbox"/>

3.4 Filler Permissions

The Filler Permissions have the same 3 options as the Builder:

1. **No Access** - when selected, the user will not have access to fill out forms to generate documents and the *Forms > Fill* option will not be available from the side navigation menu,
2. **All forms & folders** - when selected, the user will have unlimited access to all published forms. This grants them access to all existing and new documents.
3. **Specific folders & forms** - when selected, access can be granted at a folder* and/or form level for the following functions:
 - a. **Read** allows the user to view all the published forms, however, they cannot generate documents.
 - b. **Write** allows the user to view and generate documents using the published forms they have access to.

Note: When granting permissions at the folder level, all existing sub-folders and forms within that folder will inherit the selected permissions. When new forms and/or sub-folders are created within that folder, they will also inherit the permissions granted from that folder.



← Permission Sets

 **Agreements - Builder** 

Cancel Save

Builder **Filler** Clause Bank Admin Permissions

No Access All folders & forms  Specific folders & forms only

3.5 Clause Bank Permissions

The Smarter Drafter Pro Clause Bank is accessible via the MS Word add-in. To grant users access, one or more of the following options must be enabled:

- **Access to Private Clause Bank** is the collection of clauses that belong to the individual user.
- **Access to Firm-Wide Clause Bank** includes all the clauses of all the users in the firm.

The following system functions can be granted at the **Clause Bank** folder level:

1. **Read** allows users to view published clauses only.
2. **Add** allows users to add new clauses.
3. **Edit** allows users to edit existing clauses.
4. **Delete** allows users to delete existing clauses.
5. **Review & Publish** allows users to review newly created clauses and either approve or reject them before publishing and making available for the team.

NOTE: The *Clause Bank Workflow* must be enabled under app settings for this function.

6. **App Settings** allows users to view and manage all clause bank settings, including *Practice Areas*, *Jurisdictions*, *Category Tags* and *Workflows*.

Builder
Filler
Clause Bank
Admin Permissions

Smarter Drafter's Clause Bank provides users quick and easy access to a repository of your firms clauses accessible from Microsoft Word.

Access to Private Clause Bank

Access to Firm-Wide Clause Bank

Folders	Read [?]	Add [?]	Edit [?]	Delete [?]	Review and Publish [?]	App Settings [?]
Select All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Admin Permissions

Admin Permissions grant users access to the following system functions:

- **User Management:** Permission to add and edit user accounts.
- **Permission Management:** Permission to edit the permissions on user accounts.
- **Companies:** Permission to add companies to the organisation’s account.
- **Groups:** Permission to create and add users to groups.
- **Payments:** Permission to view payments.
- **Report:** Permission to view, create and download reports.
- **Account:** Permission to manage the organisation’s account.
- **Submissions:** Permission to view, clone and manage form submissions made by form fillers.

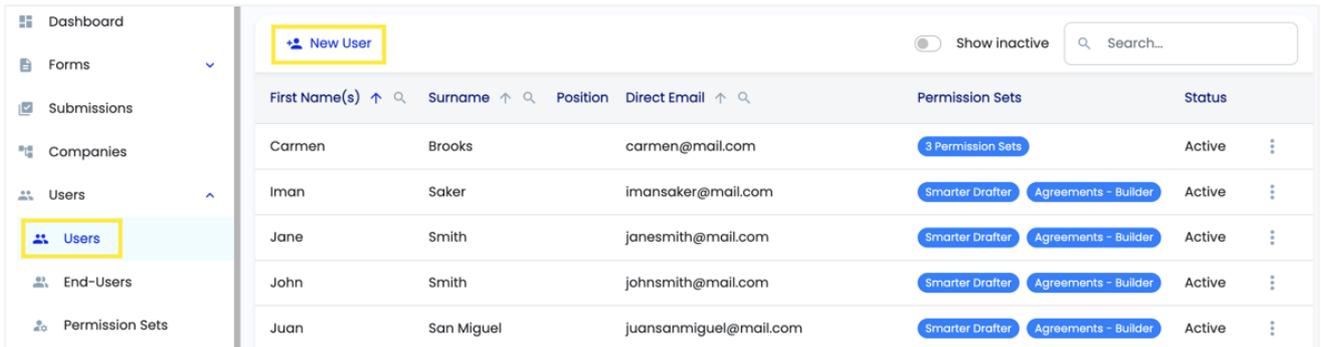
For example, if a set of users requires access to submissions and needs to create reports but does not require access to any other admin features, the permission set could be set as follows:

Builder	Filler	Clause Bank	Admin Permissions
Select the admin permissions you'd like to grant to this user and where they can apply them below			
<i>Select All</i>			<input checked="" type="checkbox"/>
User Management			<input type="checkbox"/>
Submissions			<input checked="" type="checkbox"/>
Permission Management			<input type="checkbox"/>
Companies			<input type="checkbox"/>
Groups			<input type="checkbox"/>
Payments			<input type="checkbox"/>
Reports			<input checked="" type="checkbox"/>
Account			<input type="checkbox"/>

5. Assigning Permissions

5.1 Assigning Permissions to New Users

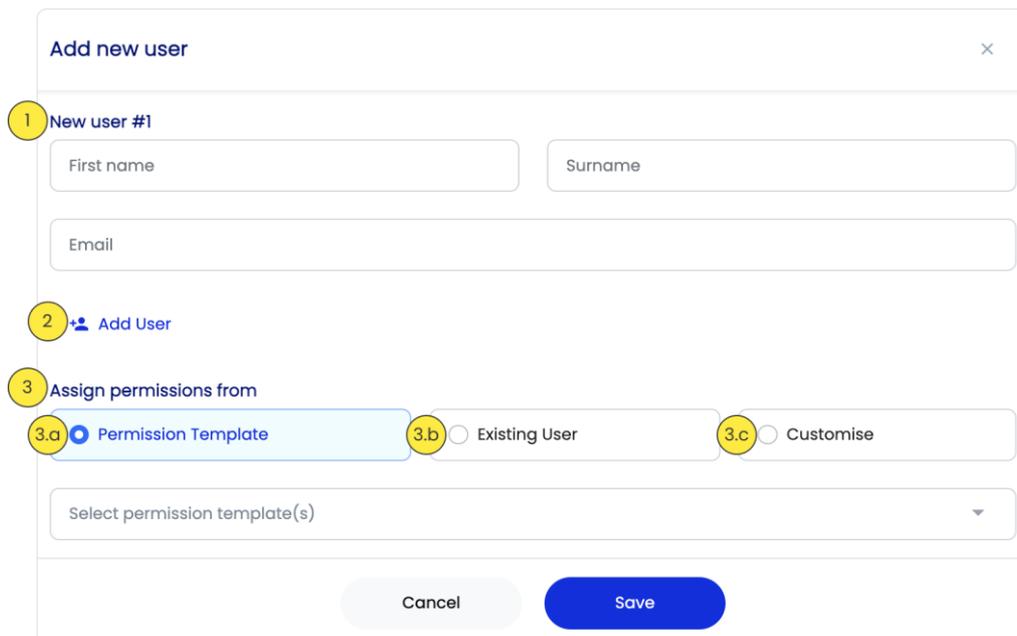
To add a new user to Smarter Drafter, navigate to **Users** from the navigation menu and click + **New User**.



First Name(s)	Surname	Position	Direct Email	Permission Sets	Status
Carmen	Brooks		carmen@mail.com	3 Permission Sets	Active
Iman	Saker		imansaker@mail.com	Smarter Drafter, Agreements - Builder	Active
Jane	Smith		janesmith@mail.com	Smarter Drafter, Agreements - Builder	Active
John	Smith		johnsmith@mail.com	Smarter Drafter, Agreements - Builder	Active
Juan	San Miguel		juansanmiguel@mail.com	Smarter Drafter, Agreements - Builder	Active

A pop up will appear prompting you to:

1. Enter the new user's details (*First name, Surname and email address*).
2. Add User (*optional*): allows you to add multiple users at a time.
3. Assign permissions from:
 - a. **Permission Set**: Allows you to select one or more Permission Sets to the new user.
 - b. **Existing User**: Allows you to assign the same permissions of an *existing* user.
 - c. **Customise**: Allows you to configure the new user's permissions manually.



Add new user [X]

1 **New user #1**

First name: Surname:

Email:

2 **+ Add User**

3 **Assign permissions from**

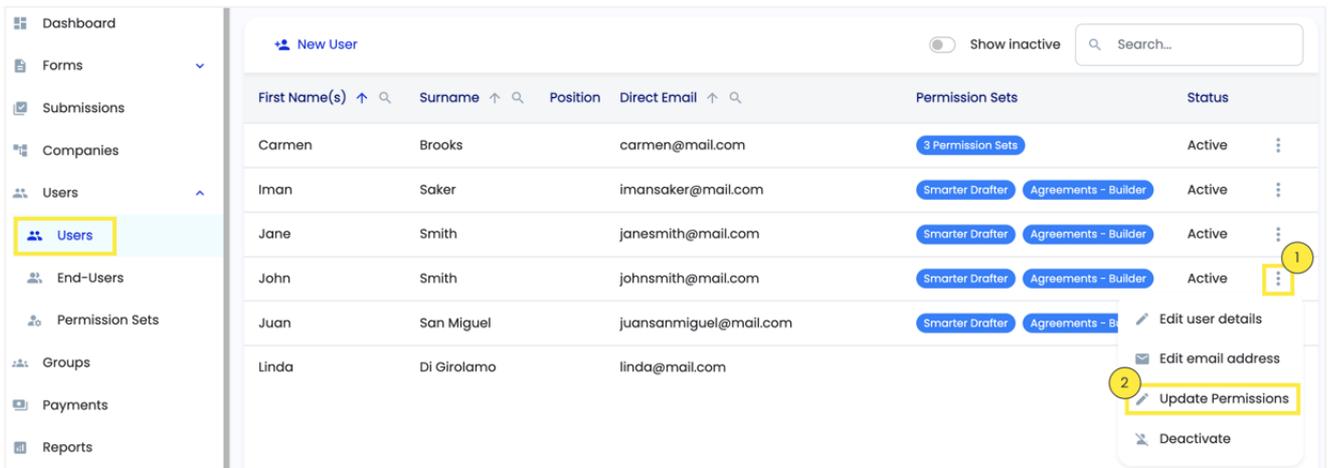
3.a **Permission Template** 3.b Existing User 3.c Customise

Select permission template(s)

5.2 Updating Existing Users' Permissions

To update an existing user's permissions, navigate to **Users** from the navigation menu, locate the user you'd like to update and:

1. Click the **ellipsis** besides their name.
2. Click **Update Permissions**.

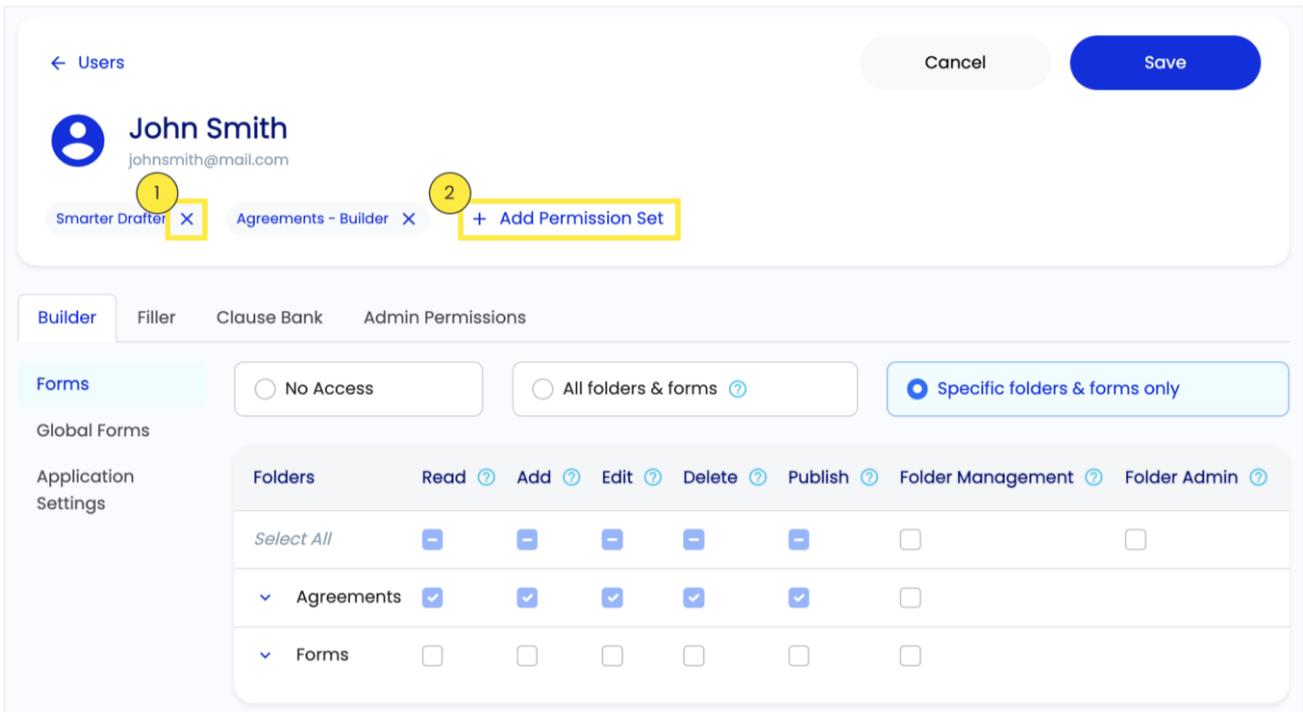


First Name(s)	Surname	Position	Direct Email	Permission Sets	Status
Carmen	Brooks		carmen@mail.com	3 Permission Sets	Active
Iman	Saker		imansaker@mail.com	Smarter Drafter Agreements - Builder	Active
Jane	Smith		janesmith@mail.com	Smarter Drafter Agreements - Builder	Active
John	Smith		johnsmith@mail.com	Smarter Drafter Agreements - Builder	Active
Juan	San Miguel		juansanmiguel@mail.com	Smarter Drafter Agreements - B	
Linda	Di Girolamo		linda@mail.com		

You will be directed to the User's profile where you can:

1. **Remove** an existing Permission Set, by clicking on the [X] beside the respective Permission Set,
2. **Add a new Permission Set**, and
3. Enable permissions in addition to those of the assigned Permission Set(s).

Note: When a Permission Set is assigned to a user, additional permissions can be added and will appear as a "Custom" Permission Set for that user.



← Users Cancel Save

John Smith
johnsmith@mail.com

Smarter Drafter × Agreements - Builder × **+ Add Permission Set**

Builder Filler Clause Bank Admin Permissions

Forms No Access All folders & forms Specific folders & forms only

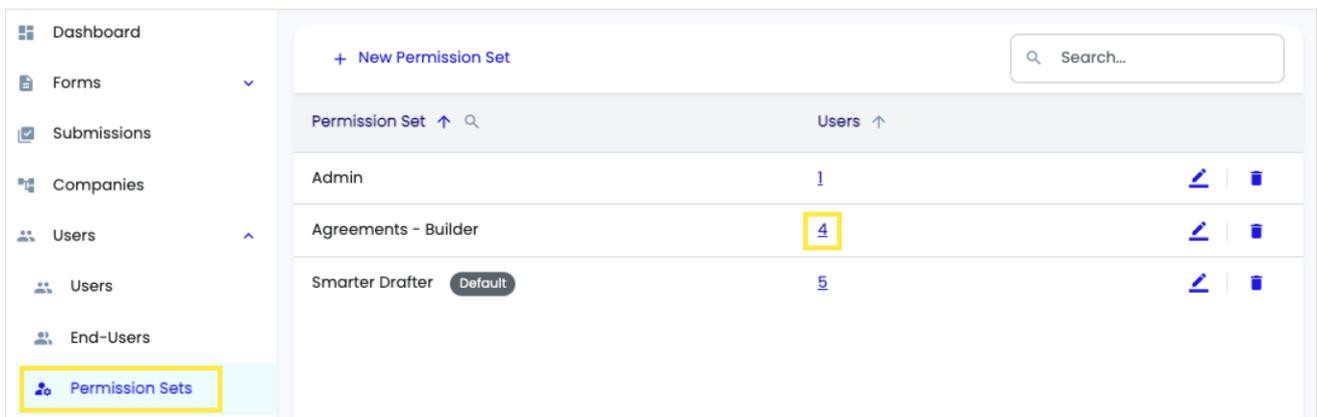
Global Forms

Application Settings

Folders	Read	Add	Edit	Delete	Publish	Folder Management	Folder Admin
Select All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Agreements	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

5.3 Add Users to a Permissions Set

To add users directly to a Permission Set, navigate to **Permission Sets** from the navigation menu, locate the Permission Set you'd like to add the user to and click on the **number of Users**.

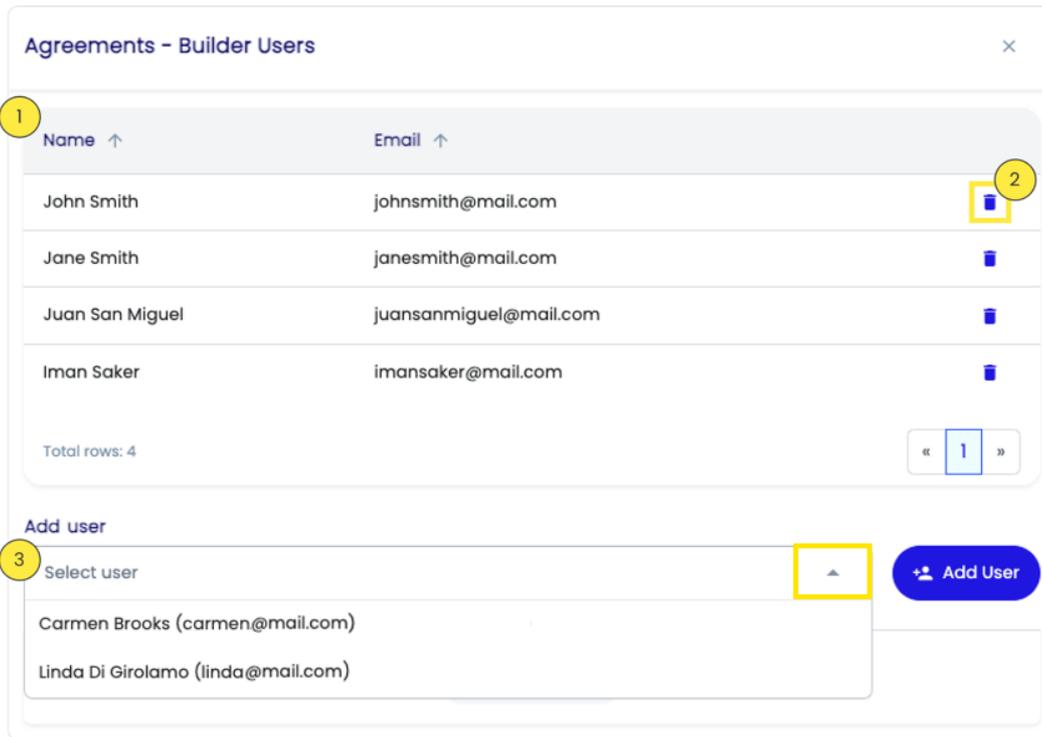


+ New Permission Set Search...

Permission Set	Users	
Admin	1	Edit Delete
Agreements - Builder	4	Edit Delete
Smarter Drafter Default	5	Edit Delete

A pop up will appear allowing you to do the following:

1. View all the users who have been assigned that Permission Set.
2. Remove users from the Permission Set by clicking the **Delete** button.
3. Add users to the Permission Set from the drop-down menu.



Agreements - Builder Users [Close]

Name ↑	Email ↑	
John Smith	johnsmith@mail.com	
Jane Smith	janesmith@mail.com	
Juan San Miguel	juansanmiguel@mail.com	
Iman Saker	imansaker@mail.com	

Total rows: 4 [« 1 »]

Add user

Select user 

- Carmen Brooks (carmen@mail.com)
- Linda Di Girolamo (linda@mail.com)

