

MARQUIS

DOCUMATIX

PERMISSIONS REFERENCE GUIDE

Marquis

5208 Tennyson Pkwy, Suite 120

Plano, Texas 75024

Technical Support: Call 888-884-5388 or email msupport@gomarquis.com

www.gomarquis.com

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USING THIS GUIDE

Welcome to DocuMatix! This guide provides institutional administrators with detailed information regarding the rights which can be assigned to users.

Let's get started!

MANAGE USERS – User Info

Path: **Account Settings/Administrator/Manage Users**

Creating and managing Users is a two-step process. On the first tab, **User Info**, the following information must be provided for each User:

- First name
- Last name
- Username *
- Password **
- Confirm password
- Email address
- Work phone

Optionally, the following information can also be provided for Users:

- Mobile phone
- Work phone Ext
- Address
- City
- State
- Zip

* Usernames are made of two parts.

The first part is the same for everyone using the same DocuMatix account and ends with a forward slash (/). This part of the username is established when your account is first set up. The second part is a unique identifier for the user you are adding. Usually, some form of the user's name is used. **Note:** Usernames are not case-sensitive.

** Passwords must be at least 8 characters long and must contain at least 3 of the following 4 categories:

- uppercase
- lowercase
- number
- symbols (@*!_#\$\$%^&+=)

The screenshot displays the 'Manage Users' interface in the MARQUIS application. The 'User Info' tab is active, showing a form with the following fields and requirements:

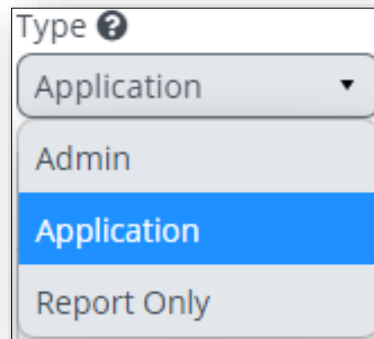
- First name** and **Last name**: Text input fields.
- Username**: Text input field with a requirement icon. The example shows 'MQLearning/' followed by a blank field.
- Password**: Text input field with a requirement icon. A note states: 'Passwords must be at least 8 characters long and must contain at least 3 of the following 4 categories: uppercase, lowercase, number, symbols (@*!_#\$\$%^&+=)'. Each category has a red circle icon.
- Confirm password**: Text input field.
- Contact Information**: Section header with a question mark icon.
- Email address**: Text input field.
- Mobile phone**: Text input field.
- Work phone** and **Ext**: Text input fields.
- Address**: Text input field.
- City**, **State**, and **Zip**: Text input fields. The 'State' dropdown menu is currently set to 'Texas'.

At the bottom right of the form, there are 'Continue' and 'Close' buttons.

MANAGE USERS – Access

On the second tab, **Access**, there are three access types from which to choose:

- **Admin:** This type of user has full rights to all functions. More than one person can be assigned Administrative rights.
- **Application:** This is the most common type of user where the level of access is determined by an Administrator.
- **Report Only:** This type of user is limited to running reports.



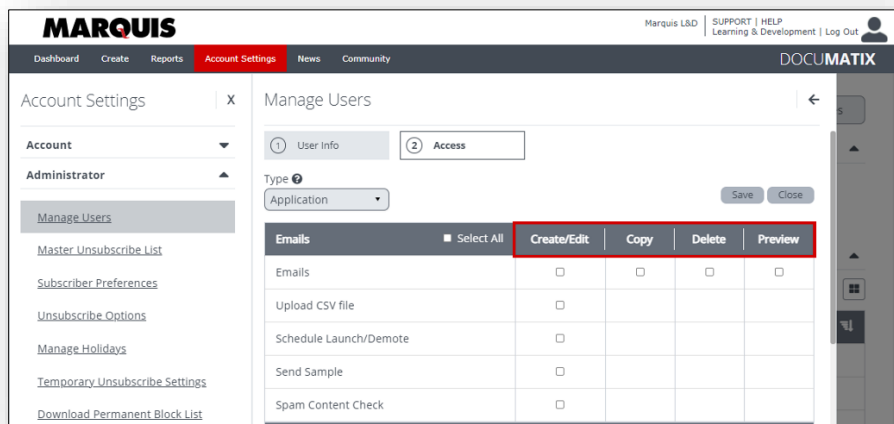
When creating an **Admin User**, simply click **Save** as this user type is given full rights to all functions.

When creating [Application](#) or [Report Only Users](#), it is necessary to grant rights to whichever functions or reports are needed.

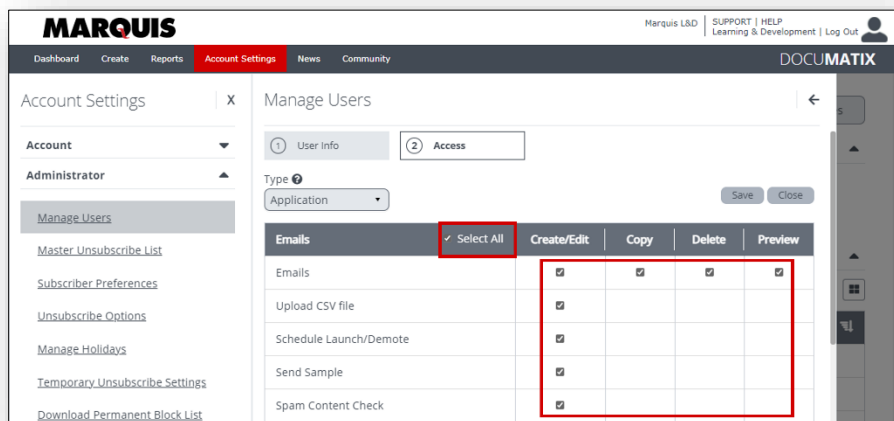
APPLICATION USER ACCESS

The top header contains the list of available rights:

- View - enables the ability to view and have access to certain areas of DocuMatix
- Create - enables the ability to create new items
- Edit - enables the ability to edit items that have already been created
- Copy - enables the ability to make a copy of items that have already been created
- Delete - enables the ability to delete items
- Preview - enables the ability to view an item in its current state during creation



The gray category headers organize the various modules based on where they can be found in the modules drop-down menu, which is found on the **Dashboard**. To the right of the module name, there is a **Select All** checkbox. This can be checked to enable full access to all rights for that module.



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Under each gray category header is a list of the various rights belonging to the category. Define the right(s) to be granted to the user. Click **Save**.

MARQUIS Marquis L&D | SUPPORT | HELP Learning & Development | Log Out

Dashboard Create Reports **Account Settings** News Community **DOCUMATIX**

Account Settings x Manage Users ←

Folders	Select All	Create	Edit	Delete
Emails		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Events		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Surveys		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Web Forms		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Web Polls		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Reports	View
Emails	<input checked="" type="checkbox"/>
Events	<input type="checkbox"/>
Surveys	<input type="checkbox"/>
Web Forms	<input checked="" type="checkbox"/>
PURLs	<input type="checkbox"/>

Additional access	
DocuMatix On Demand	<input type="checkbox"/> Manage DOD options
Community	<input checked="" type="checkbox"/> Participate in DocuMatix Community

Save Close

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RIGHTS DETAILS

EMAILS

This section controls the rights for each process involved with building and launching emails.

Emails	
Emails - Create/Edit	<ul style="list-style-type: none"> • Create new emails • Edit existing emails
Emails - Copy	Copy existing emails
Emails - Delete	Delete existing emails
Emails - Preview	View an email in its current state
Upload CSV file - Create/Edit	Upload the CSV file containing recipient data
Schedule/Demote - Create/Edit	<ul style="list-style-type: none"> • Schedule email for launch • Remove email from scheduled launch and make editable
Send Sample - Create/Edit	Send a sample email to desired recipient(s)
Spam Content Check - Create/Edit	Test the likelihood of email being treated like spam and receive report with findings

The screenshot shows the Marquis Documatix interface. At the top, there's a navigation bar with 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. The 'Product Suite' dropdown is set to 'Emails'. Below this, the 'Add New' section features several template buttons: Standard, Marketing Path, Newsletter, Triggered, Web Form, and PURL. A context menu is open over the 'Standard' button, listing actions: Edit, Copy, Delete, Save as Template, Merge Fields, Preview and Test, Upload Data File, Data Upload Summary, Schedule Launch, Convert To, and Move to Folder. Below the 'Add New' section is the 'Recent Work' section, which includes a table with columns for Name, Description, Type, and Updated Date. The table lists several email templates and their launch dates.

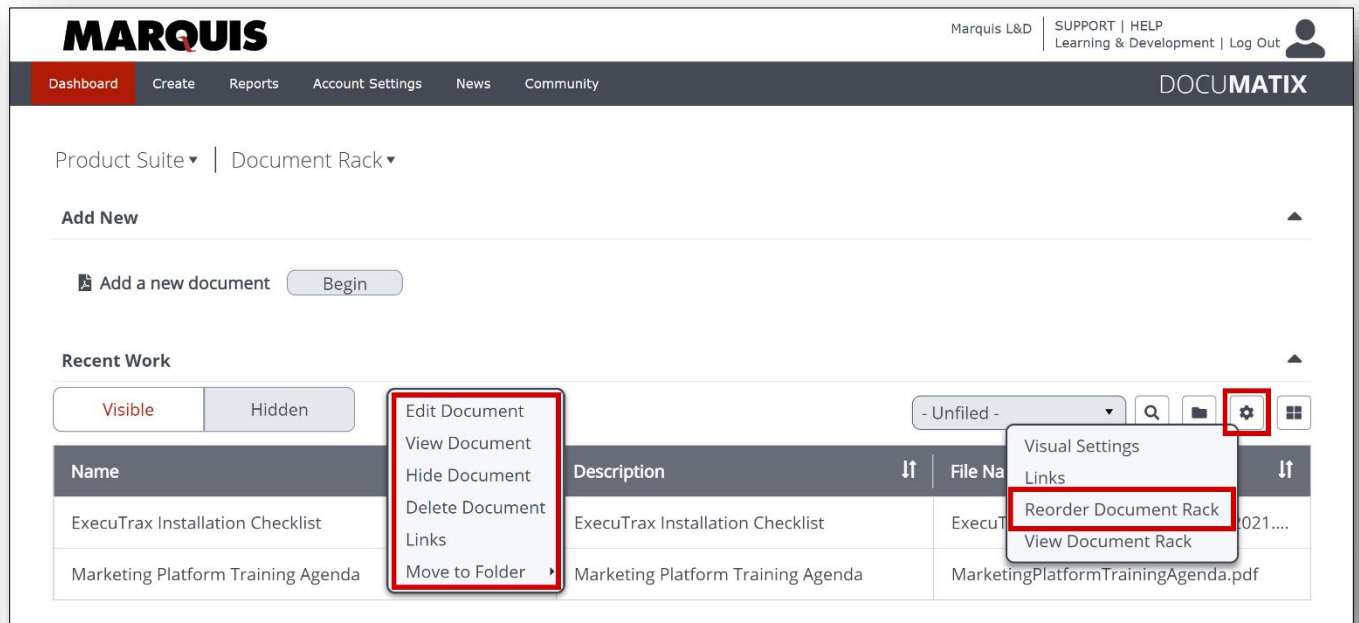
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DOCUMENTS

This section controls the rights for each process involved with using the Document Rack.

Documents	
Documents - Create/Edit	<ul style="list-style-type: none"> Add new documents to Document Rack Edit existing documents in the Document Rack
Documents - Delete	Delete documents from the Document Rack
Re-order Documents - Create/Edit	Re-arrange the documents in the Document Rack
Generate URL - Create/Edit	Generate unique URLs for documents in the Document Rack



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EVENTS

This section controls the rights for each process involved with using Events.

Events	
Events - Create/Edit	<ul style="list-style-type: none">• Create new Events• Edit existing Events
Events - Copy	Copy existing Events
Events - Delete	Delete existing Events
Publish/View Event Links - Create/Edit	<ul style="list-style-type: none">• Publish Events (make them public)• View Event links and QR codes
Sessions - Create/Edit	<ul style="list-style-type: none">• Create new Sessions for an Event• Edit existing Sessions for an Event
Sessions - Delete	Delete existing Sessions for an Event

The screenshot shows the Marquis DOCUMATIX interface. The top navigation bar includes 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. The 'Events' section is active, showing 'Add New' and 'Recent Work' tabs. A table lists events, with a dropdown menu open for 'Company Christmas Party 2021'. The dropdown menu options are: Edit, Copy, Delete, Preview, Publish, Manage Sessions, and Move to Folder.

Name	Description	Sessions	Updated Date
Company Christmas Party 2021	Company Christmas Party	0	7/5/2022

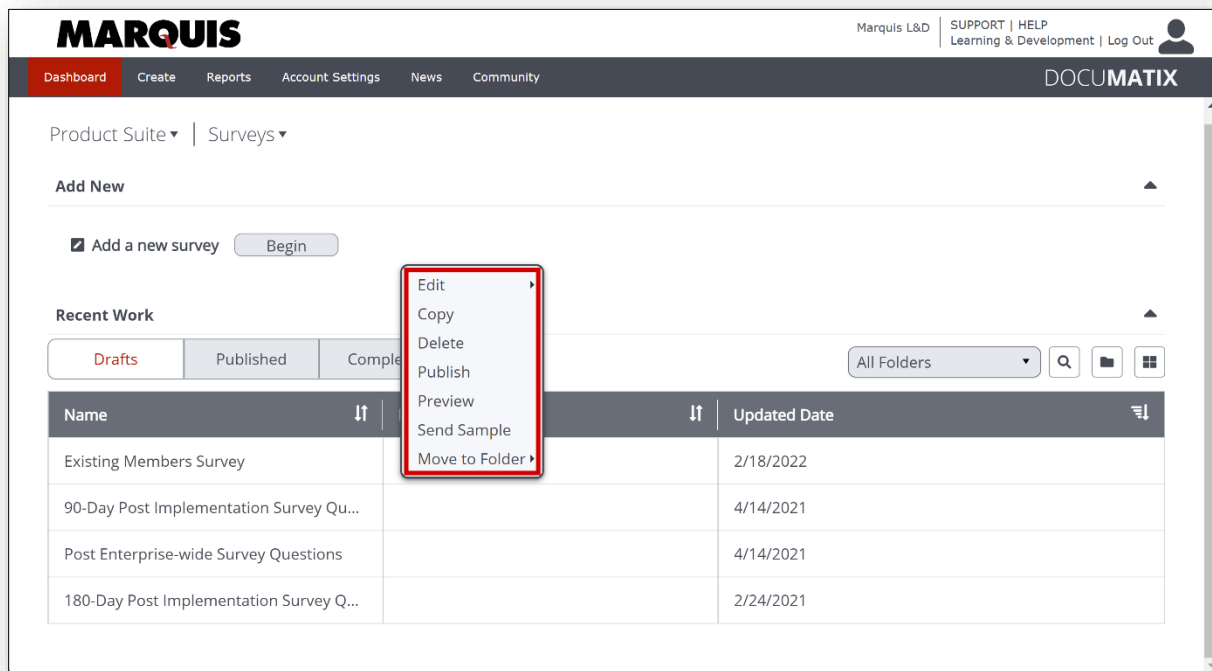
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SURVEYS

This section controls the rights for each process involved with using Surveys.

Surveys	
Surveys - Create/Edit	<ul style="list-style-type: none"> • Create new Surveys • Edit existing Surveys
Surveys - Copy	Copy existing Surveys
Surveys - Delete	Delete existing Surveys
Publish/View Survey Link - Create/Edit	<ul style="list-style-type: none"> • Publish Surveys (make them public) • View Survey links and QR codes
Send Sample - Create/Edit	Send a sample survey to desired recipient(s)



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WEB FORMS

This section controls the rights for each process involved with using Web Forms.

Web Forms	
Web Forms - Create/Edit	<ul style="list-style-type: none"> • Create new Web Forms • Edit existing Web Forms
Web Forms - Copy	Copy existing Web Forms
Web Forms - Delete	Delete existing Web Forms
Publish/View Web Forms Link - Create/Edit	<ul style="list-style-type: none"> • Publish Web Forms (make them public) • View Web Form links and QR codes
Revisions/Revision History - Create/Edit	Create a revision of a Published or Completed Web Form which places an editable version in the Drafts folder
Revisions/Revision History - Preview	View history of all revisions of Published or Completed Web Forms

The screenshot shows the MARQUIS web application interface. At the top, there is a navigation bar with the MARQUIS logo, user information (Marquis L&D), and links for SUPPORT | HELP, Learning & Development | Log Out. Below the navigation bar, there are tabs for Dashboard, Create, Reports, Account Settings, News, and Community. The main content area is titled 'Product Suite | Web Forms'. There is an 'Add New' section with a button 'Add a new web form' and a 'Begin' button. Below that is the 'Recent Work' section, which has tabs for Drafts, Published, and Completed. A table lists recent work items with columns for Name, Email, and Updated Date. A context menu is open over the 'Updated Web Form' entry, showing options: Edit, Copy, Delete, Publish, Preview, Send Sample, and Move to Folder. The 'Edit' option is highlighted with a red box.

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WEB POLLS

This section controls the rights for each process involved with using Web Polls.

Web Polls	
Web Polls - Create/Edit	<ul style="list-style-type: none"> • Create new Web Polls • Edit existing Web Polls
Web Polls - Copy	Copy existing Web Polls
Web Polls - Delete	Delete existing Web Polls
Web Polls - Preview	View a web poll in its current state during a build
Publish/View Web Polls Settings - Create/Edit	<ul style="list-style-type: none"> • Publish Web Polls (make them public) • View Web Poll HTML code
Responses - Preview	View results of Web Poll responses

The screenshot displays the Marquis Documatix interface. At the top, the 'MARQUIS' logo is on the left, and 'SUPPORT | HELP Learning & Development | Log Out' is on the right. Below the logo is a navigation bar with 'Dashboard' (selected), 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. The main content area shows 'Product Suite' and 'Web Polls' dropdowns. Under 'Add New', there are two buttons: 'Add a new web poll' and 'Add a new web poll from a template'. Below that is the 'Recent Work' section with tabs for 'Drafts', 'Published', and 'Completed'. A table lists recent work items with columns for Name, Title, and Updated Date. A context menu is open over the 'Mobile Payment Options 2' row, showing options: Edit, Copy, Delete, Publish, Preview, and Move to Folder.

Name	Title	Updated Date
Mobile Payment Options 2	Mobile Payment Options	6/27/2022
Online Holiday Shopping	Online Holiday Shopping	6/25/2021
Mobile Wallet	Mobile Payment Options	5/13/2020
Intranet Content Poll	We Want To Know	4/22/2020
Volunteer t-shirt sizes	T-Shirt Size Poll	4/22/2020

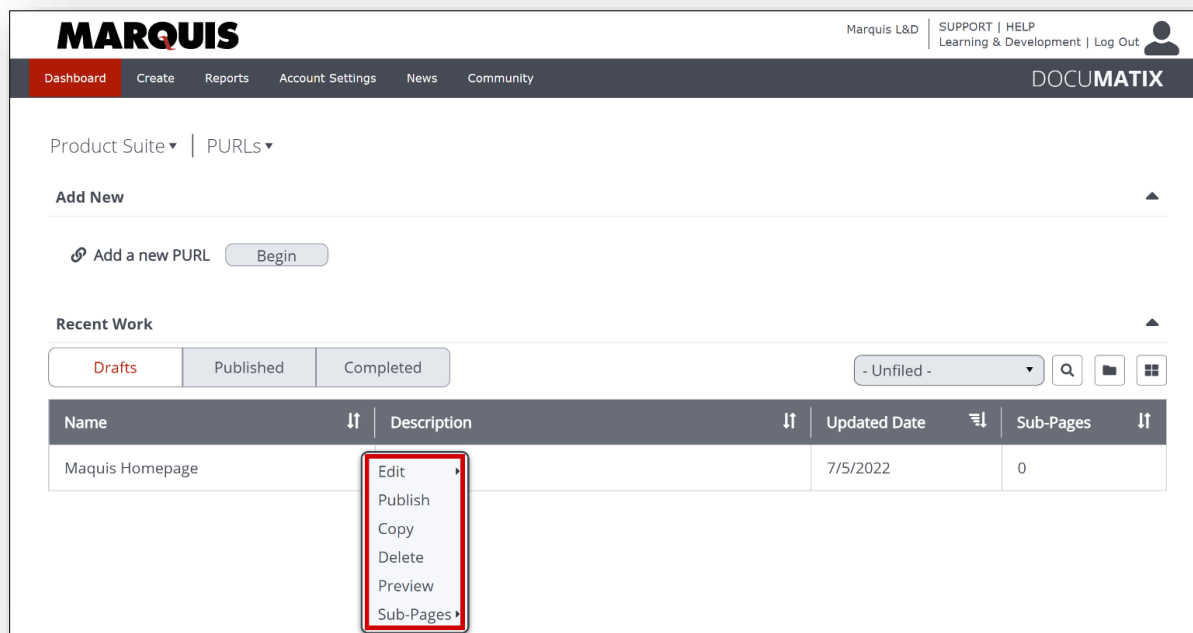
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PURLs

PURLs are personal URLs. This section controls the rights for each process involved with using PURLs.

PURLs	
PURLs - Create/Edit	<ul style="list-style-type: none"> • Create new PURLs • Edit existing PURLs
PURLs - Copy	Copy existing PURLs
PURLs - Delete	Delete existing PURLs
PURLs - Preview	Preview PURL landing page
Publish PURLs - Create/Edit	Publish PURLs (make them public)
PURL Info - Preview	View all PURL Info: <ul style="list-style-type: none"> • Name • Description • Sub-Domain • Campaign Name • PURL Example • Expire Date • Expire Notification Email • Redirect URL • Merge Fields • HTML Pages • Uploaded Data



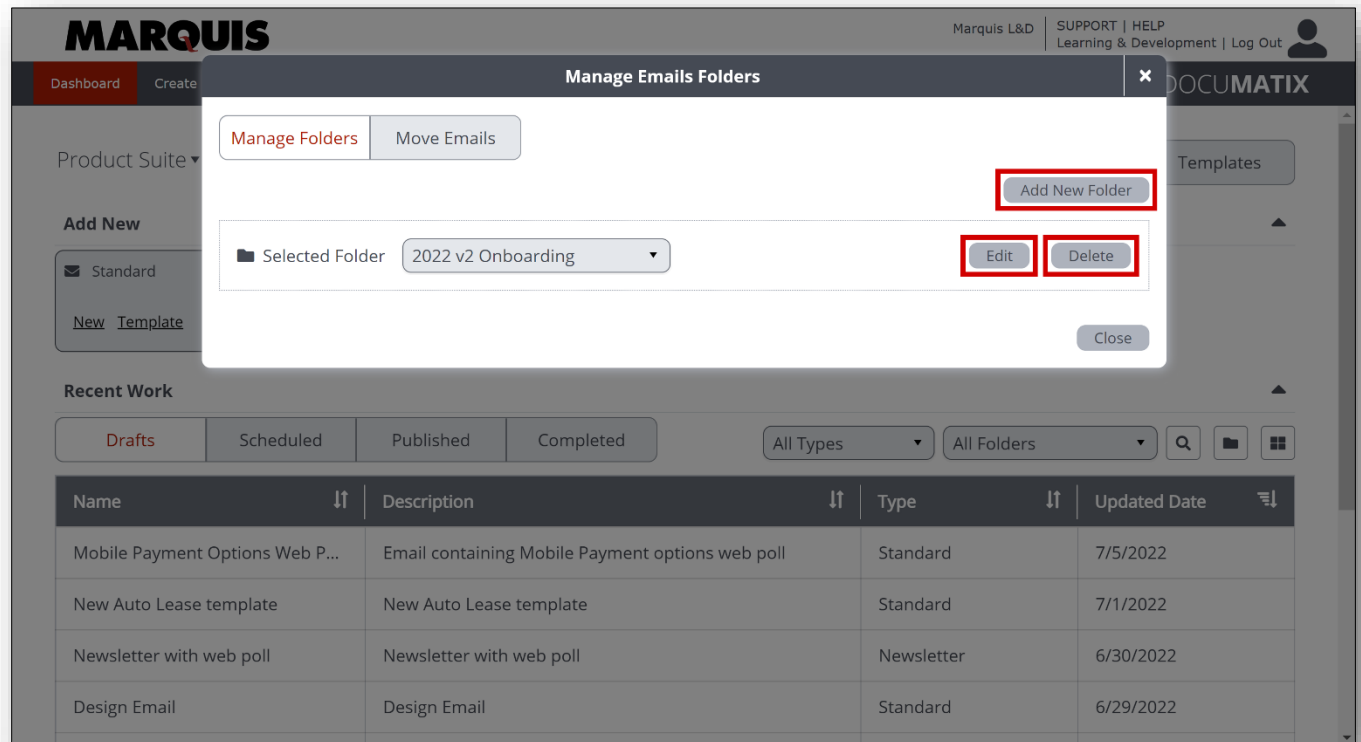
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FOLDERS

This section controls the rights for creating and maintaining folders for each module in DocuMatix.

Folders	
Emails - Create	Create folders for organizing Emails
Emails - Edit	Edit folders for organizing Emails
Emails - Delete	Delete folders for organizing Emails
Events - Create	Create folders for organizing Events
Events - Edit	Edit folders for organizing Events
Events - Delete	Delete folders for organizing Events
Surveys - Create	Create folders for organizing Surveys
Surveys - Edit	Edit folders for organizing Surveys
Surveys - Delete	Delete folders for organizing Surveys
Web Forms - Create	Create folders for organizing Web Forms
Web Forms - Edit	Edit folders for organizing Web Forms
Web Forms - Delete	Delete folders for organizing Web Forms
Web Polls - Create	Create folders for organizing Web Polls
Web Polls - Edit	Edit folders for organizing Web Polls
Web Polls - Delete	Delete folders for organizing Web Polls



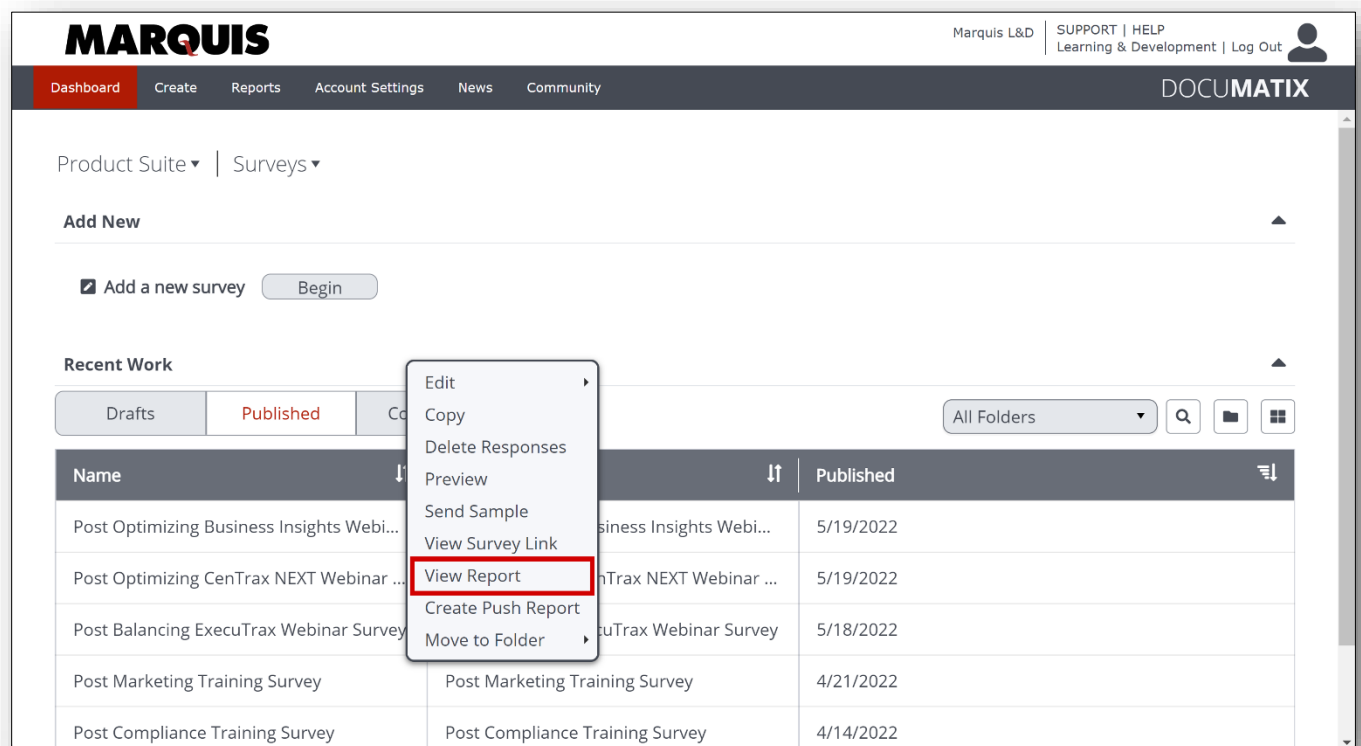
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REPORTS

This section controls the rights for viewing reports for each module in DocuMatix.

Reports	
Emails - View	View reports for Emails
Events - View	View reports for Events
Surveys - View	View reports for Surveys
Web Forms - View	View reports for Web Forms
Web Polls - View	View reports for Web Polls



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ADDITIONAL ACCESS

This section controls the rights for DocuMatix On Demand and DocuMatix Community.

Additional access	
DocuMatix On Demand - View	Grants access to DocuMatix On Demand
Community - View	Participate in DocuMatix Community

The screenshot shows the Marquis DocuMatix interface. The 'Community' tab is highlighted in the top navigation bar. A dropdown menu is open under 'Emails', with 'On Demand' selected and highlighted with a red box. Below the navigation, there are several 'New Template' buttons for different content types: Marketing Path, Newsletter, Triggered, Web Form, and PURL. The 'Recent Work' section shows a table of drafts, scheduled, published, and completed items.

Name	Description	Type	Updated Date
Mobile Payment Options Web P...	Email containing Mobile Payment options web poll	Standard	7/5/2022
New Auto Lease template	New Auto Lease template	Standard	7/1/2022
Newsletter with web poll	Newsletter with web poll	Newsletter	6/30/2022
Design Email	Design Email	Standard	6/29/2022

REPORT ONLY USER ACCESS

When granting access for **Report Only Users**, you can specify which reports the user can and cannot access. These selections are organized by each module within DocuMatix:

- Emails
- Events
- Surveys
- Web Forms
- Web Polls
- PURLs

To the right of each module name, there is a **Select All** checkbox which can be checked to enable access to all reports under the module. There is also an **All current and future** checkbox for each module which can be checked to enable access to all current and future reports under the module. Once access has been given to the needed reports, click **Save** at the bottom of the page.

