

How to set privacy at the level of Matter or Folder

Objectives

- Set Privacy at the level of the Matter
- Set Privacy at the level of Folder

Steps

In LEXZUR, you can set privacy at the level of Matter or folder.

When adding a matter, you can review the privacy settings on the **"General Info"** section of the create matter page. Click on the **"Everyone"** link to share it with specific users. By default, the matter creator and assignee will be set as the default users with whom the matter is shared. You have the option to add any other users and set it as **private**.

The screenshot shows the 'Add Corporate Matter' form. The 'General Info' tab is active. A red box highlights the 'Shared With' dropdown menu, which is open and shows 'Matter Creator' and 'Assignee' as options. A red arrow points from the 'Set Private' button to the 'Shared With' dropdown.

You can also set the privacy of a corporate matter or a litigation case from the **Privacy** section in the General Information of the matter.

The screenshot shows the 'Legal Opinion for Alvah Batz' matter page. The 'General Info' tab is active. A red box highlights the 'Privacy' section, which shows 'Shared With' set to 'Everyone' and a 'Set as Private' button.

In addition, all matters can be set to private by default by the administrator.

This can be done from the System Settings Setup & Configuration. Click on the **default values** tab and set "Matter private by default" to "yes".

Active Directory	Intellectual Property Status	1-Open	Save
Adobe Sign Integration	User Groups Included in KPI Report	<div> System Administrator X Administrator X User X Accountant X User read-only X Accountant read-only X IT - Maker X IT- Checker X </div>	Save
Advisor Portal	Matter cap - Reset Cap amount after invoicing	No	Save
Contract/Document Default Values	Matter Private by Default	No	Save
Client Portal	Only requested by can edit the task metadata	Yes	Save
Default Values	Privacy per Assigned team	No	Save
Delegation	IP Assigned Team	All Teams	Save
DocuSign Integration			
emSigner Integration			
External Links			
Hearing Verification Process			
Document Content Search			
Maker Checker Control			
Menu External Links			
Notifications			
Outgoing Mail			
Password Policy			

Privacy can be set also at the level of the folder. You just need to click near the folder "share with"

App4Legal Documents										
Google Drive SharePoint OneDrive Dropbox URL's										
Download Rename Move Copy Link Share with Delete										
X 1 Selected										
Documents										
	Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By	Modified on	
	Agreement_template				-	2020-05-12 09:3...	Garry Malbeck	Garry Malbeck	2020-05-12 1	
	Contract Templates				-	2021-06-03 05:3...	William Singleton	William Singleton	2021-06-03 0	
<input checked="" type="checkbox"/>	General				-	2020-08-09 12:...	Garry Malbeck	Garry Malbeck	2020-08-09	
	Hearing Template				-	2021-05-31 07:26...	William Singleton	William Singleton	2021-05-31 10	

Select if you want to share the folder with recipients, give them "Editor/Viewer" permissions, and select the access type.

Share with Recipients

General

Add Recipients

Add people and groups

Permission

Editor

Add

App4Legal access



Everyone

All App4Legal Users having required permissions can access this document

Cancel

Save

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!