How to set privacy at the level of Matter or Folder
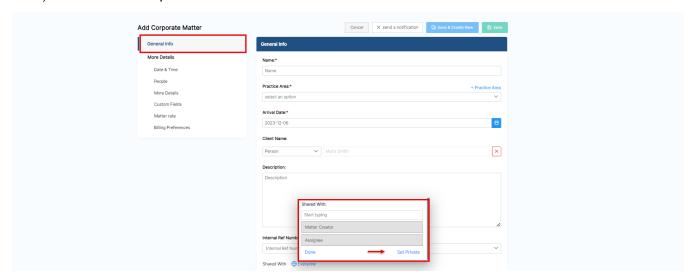
Objectives

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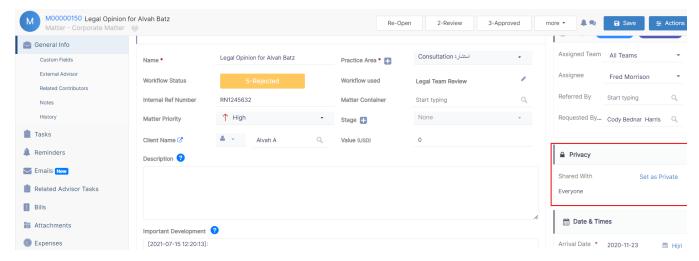- Set Privacy at the level of Folder

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.**
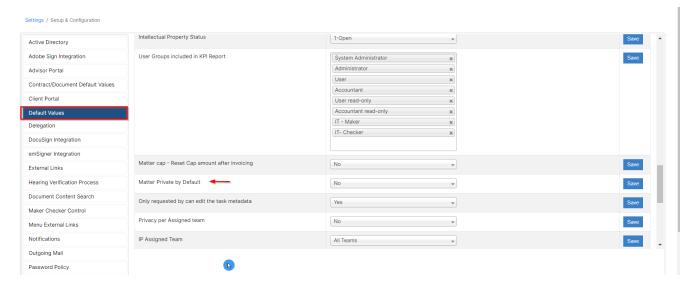

You can also set the privacy of a corporate matter or a litigation case from the **Privacy** section in the General Information of the matter.
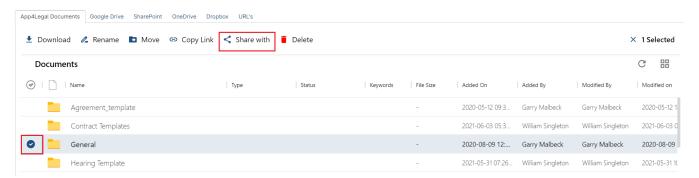

In addition, all matters can be set to private by default by the administrator.
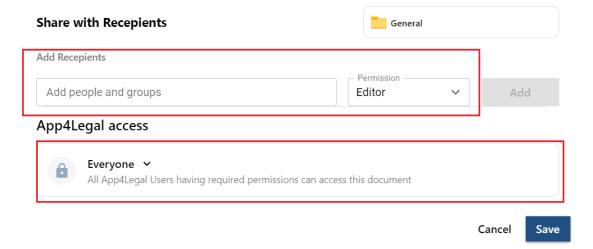
This can be done from the System Settings Setup & Configuration. Click on the **default values** tab and set "Matter private by default" to "yes".

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

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

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

Thank you!