



Documents: Permissions explained

This article details the permissions available in the document application and explains how to set these to inherit across directory levels.

An [application administrator](#) of People can create [People Roles and Groups](#) and add users to these.

An application administrator of Documents can then specify Users/Roles/Groups in permissions across folders and files to give or restrict access.

This differing permissions structure across users and the document directory will determine each user's experience and ensure that they can only interact with the appropriate content to the correct degree.

An application administrator of Documents can change permissions on the admin side of the application as detailed [here](#)

An end user (with this ability) can change permissions from the front end of the application by following the steps [here](#)

Available Permissions

Permissions that can be set on folders and files are the same:

A screenshot of a permissions dialog box for a document titled "Sample Document 9.pdf". The dialog has a header with a back arrow, the document name, and a star icon. Below the header, there are icons for "Full screen" and a "Version 1" tag. A checkbox labeled "Inherit rights from parent folder" is present. Below this is a search bar with the text "Start typing to add..." and two buttons: "Browse" and "Remove". A dropdown menu is open, showing "All registered" and "Owner" as options, with "Role: Administrators" selected and highlighted in blue. Below the dropdown is a list of permissions with checkboxes: "View" (checked), "Create Draft" (unchecked), "Edit & Approve" (checked), "Move/delete" (checked), "Edit Metadata" (checked), and "Edit permissions" (unchecked). At the bottom, there is a link "View effective permissions..." and two buttons: "Apply permissions" and "Close".

- **View** – Users can see this content listed in the application, if a document they can [download it](#).
- **Create Draft** – This user can only submit draft documents rather than directly upload them. Other users with 'Approve' permissions can publish these drafts.
 - If you're not using an approval process, this permission can be left blank for all. If you are, it's required to give a user "View" and "Create Draft" permissions only, then give another group/role all other permissions, allowing them to publish draft documents submitted.
- **Edit & Approve** – Users can add documents to a folder, create sub-folders in the parent folder, as well as approve other users' drafts (if drafts are being utilised).
- **Move/Delete** – Users can add folders and documents to the clipboard and [relocate these](#) to another area of the directory, as well as delete content.
 - The trashcan retains 'deleted' items for 30 days in case mistakes are made, and content can be retrieved or permanently deleted from the trashcan. End users can only see content they moved to the trash can, administrators of documents can see everyone's.
- **Edit Metadata** – Users can edit the associated [metadata](#) of folders/documents e.g. properties such as titles, tags, author, review date, etc.
- **Edit Permissions** – Users can alter the permissions on a folder or document, giving or restricting access to all of the above.
 - Only application administrators can give/remove this permission from the [admin side](#).

Please note: "View" and "Edit & approve" permissions only will allow users to upload files and new versions but "Edit metadata" permissions will be needed too if they should also be able to edit document properties e.g title, tags, metadata

General logic to understand when assigning permissions

In Documents, access is given to the top-level (parent folder) by inputting permissions groups/roles/users.

The permissions groups/roles/users put into the parent will impact which groups can be picked in its content and/or subfolders.

Logically, users that are not defined in the parent cannot access the content in it - or be chosen for any of its sub level content - they need to be included in the parent first.

Subsequently, the system will only offer groups/roles/users that have been defined in the parent when setting permissions for its content or subfolders/files.

If a group/role/user is not appearing in the subfolder permissions, it will be because they have not been included in the parent or have been left out at some point in the folder levels above the one being modified.

To troubleshoot, the permissions at each level above the content you are trying to update can be checked to see where the group/role/user has been left out, with this is rectified by adding them in and saving.

Setting 'inherit' permissions

Folder level

To speed up creating folder structure, Claromentis has an 'inherit' checkbox option for permissions for subfolders.

This will pull through the permissions set on the folder above and apply this to the subfolder.

The screenshot shows a 'View/edit permissions' dialog box. At the top, there is a checkbox labeled 'Inherit rights from parent folder' which is checked and highlighted with a red rectangular box. Below this checkbox are two buttons: 'Start typing to add...' and 'Browse', followed by a 'Remove' button. Underneath these buttons is a list of permissions: 'All registered', 'Owner', and 'Role: Administrators'. Below this list is a section with several checkboxes: 'View' (checked), 'Create Draft', 'Edit & Approve', 'Move/delete', 'Edit Metadata', and 'Edit permissions'. At the bottom of the dialog, there is a link 'View effective permissions...' and two buttons: 'Apply permissions' and 'Close'.

Inheriting can be turned off by deselecting the checkbox and custom permissions added into new folders instead.

Please note: When not inheriting only users/roles/groups defined in the parent folder can be selected as Documents logic requires users/roles/groups to be defined higher in the directory for use in the lower levels.

Document level

Document permissions also offer an 'inherit' option.

This means the permissions for the folder the document is being put into will also be applied to the file.

Documents > Document Library

Add new Document

Files

Choose file

or select from pre-uploaded...

Tags

popular tags: intranet, claromentis, microsoft, excel, social

Review Date

Author

Select user

Browse

Related Documents

Add new

Select document

Description

☐ Inherit

Version comment

Permissions

☒ Inherit rights from parent folder

Start typing to add... Browse Remove

All registered

Owner

Role: Administrators

☐ View

☐ Create Draft

☐ Edit & Approve

☐ Move/Delete

☐ Edit Metadata

☐ Edit permissions

View effective permissions...

Notifications

☒ None

☐ Select recipients

Status

☐ Mark as draft

Add a Document

The 'inherit' option can be deselected here too so custom permissions can be set for documents that differ from the folder permissions.

This allows different users/roles/groups to see different files listed when in the same folder based on their permissions.

Please note: When not inheriting only users/roles/groups defined in the parent folder can be selected as Documents logic requires users/roles/groups to be defined higher in the directory for use in the lower levels.