

Folder Permissions

Introduction

Permissions are rules set by user/role/group that give different levels of access. Depending on the permissions set different functions are allowed to be carried out by these categories of people.

For folders the permissions that can be assigned are to view, create a draft folder, edit & approve, move/delete, edit metadata and finally to edit permissions. Usually administrators can carry out all these functions, with other users/groups only given certain levels of access. For example, only the ability to view, edit (add new documents) and move/delete.

The nature of permissions gives your company the capability to restrict or give access to users where required, subsequently creating multiple user perspectives of the Intranet.

Assigning permissions in the back end

Go to Applications > Admin > documents > Manage Documents List

In the Documents directory permissions can be set for folders at the root as well as all other folders separately. Image 1 shows the separate buttons to click on to access the permissions for the root and all other folders.

- Permissions can be set to allow users to add folders at the root.
 - Without these permissions users can only add folders/files within those already established at the root, but not create any new root folders.
 - This would allow an admin/manager to control the highest level of the directory but still enable other users to add files where needed at the lower levels.
 - This ensures the core of the directory is stable, can only be accessed by those authorised and not susceptible to unwarranted changes.
- Each folder created a level down from the root can also have permissions set individually or inherit the same ones from its parent folder. So, in order to access a folder a user/role/group must be given permissions to it's parent first.

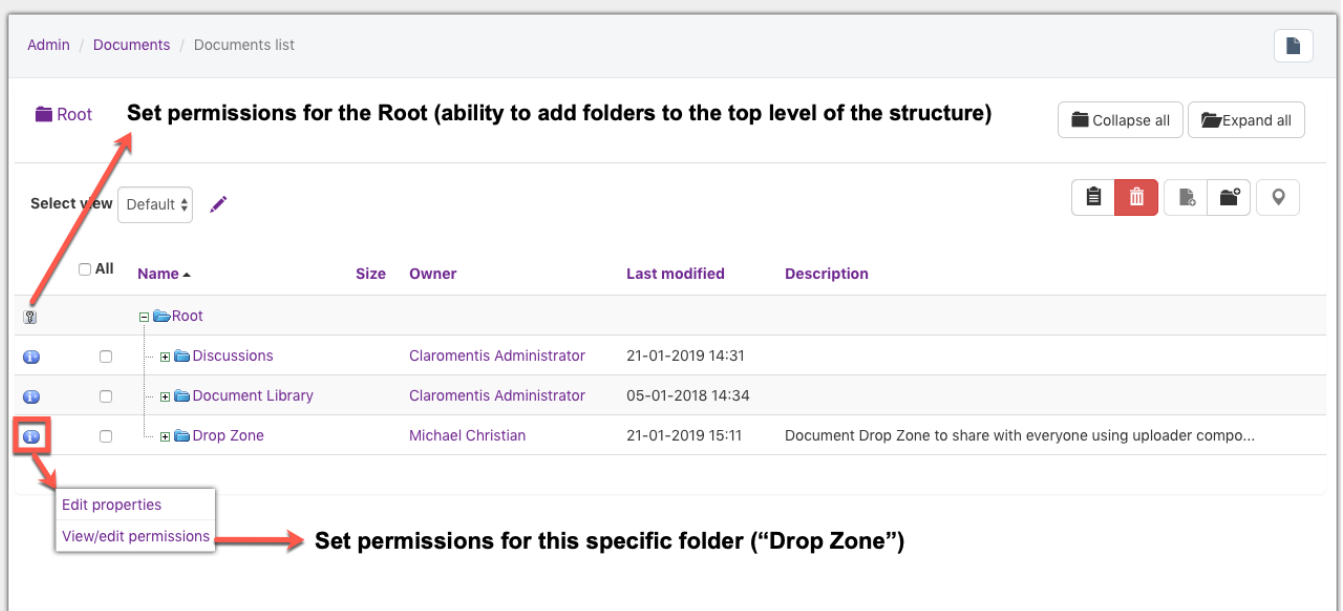


Image 1 - How to assign permissions for root and all other folders

Image 2 shows the permissions currently set for the root. (Click on the key icon shown in Image 1 to access

this menu).

- In this example, all users in the roles of "Administrators" and "Managers" are able to add/remove folders at the root, or as it says in the pathway "Edit rights to add top-level folders".
- Use this box to add any users/roles/groups that you wish to be able to manipulate the root and click "Apply Permissions" to confirm.
- Your added groups have now been assigned permissions to access/edit the root.

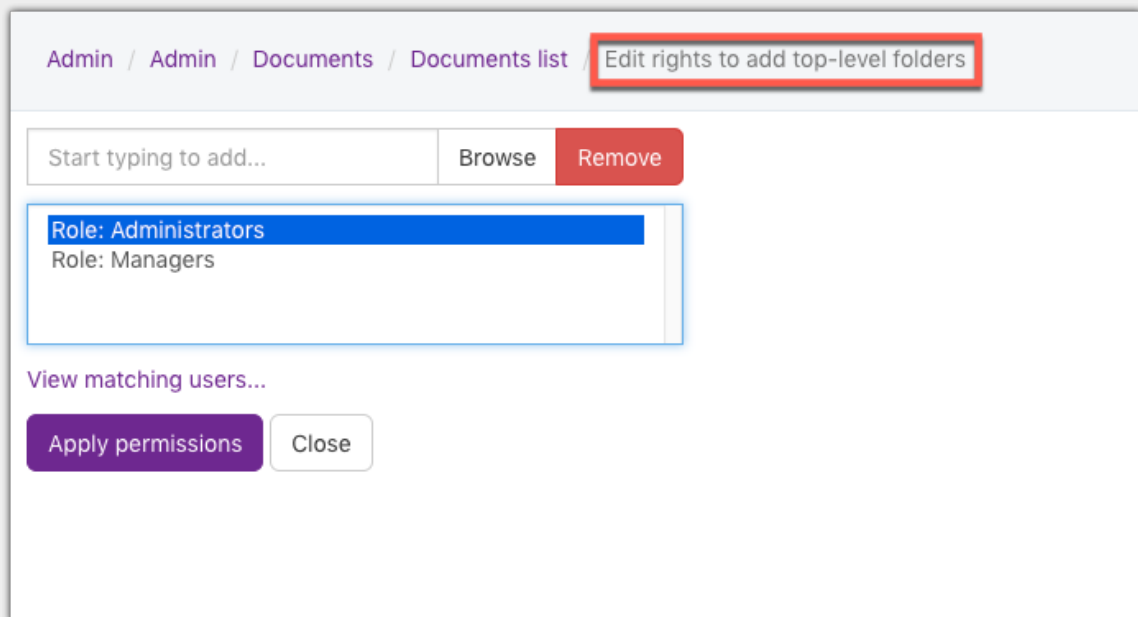


Image 2 - Assigned permissions currently active for the Root

Image 3 shows the permissions for the folder "Drop Zone". (Click on the icon to the left of your chosen folder as shown in Image 1)

- In this example "All registered users" can view and edit items in the folder (edit = add new files).
- "Administrators" and the "Owner" (creator of the folder) have additionally been given the ability to edit permissions.
- However, if the folder was only meant for the "Administrators", we can remove all registered users from the permissions box.
 - Now only the administrators and the owner would be able to see the folder in the directory and edit the folder's contents.
 - This can be particularly useful for folders shared between departments or with clients.
 - Ensure the permissions have been correctly set for what you want to achieve, and a user/role/group hasn't mistakenly been given editing or viewing permissions.

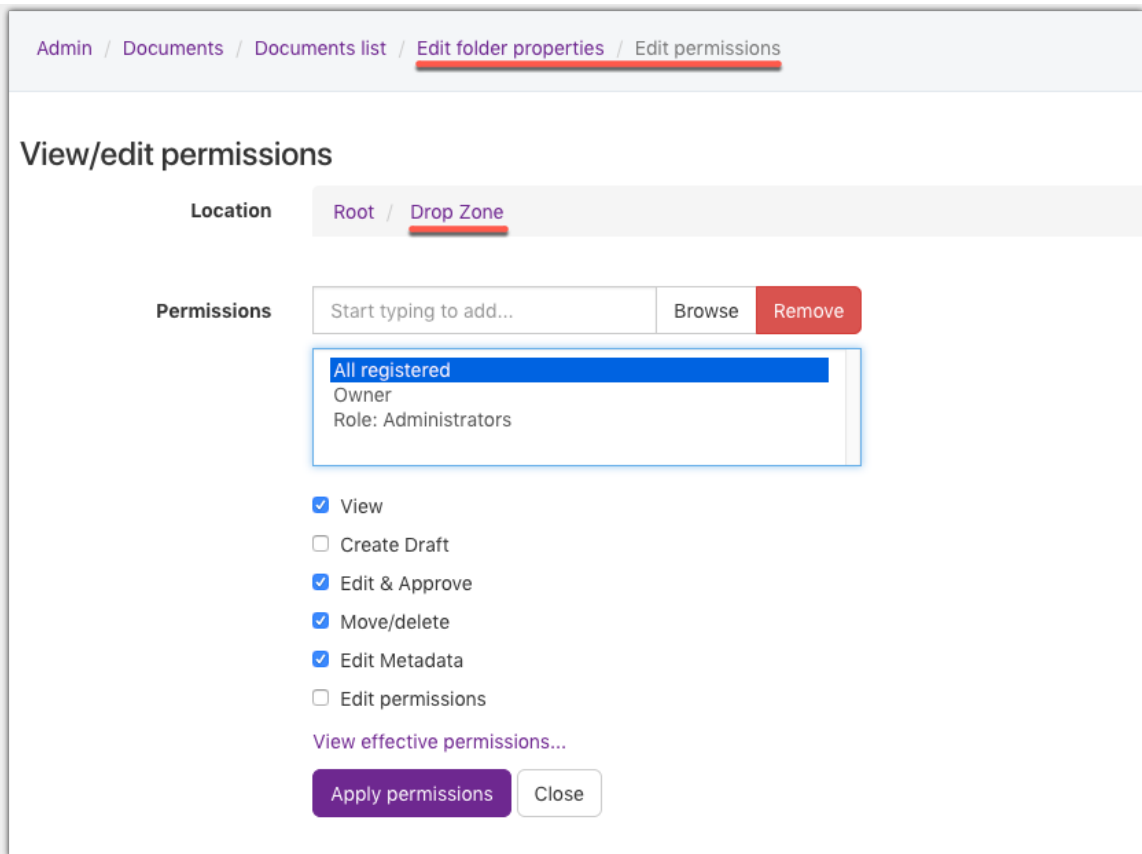


Image 3 - Assigned permissions currently active for the folder "Drop Zone"

Assigning permissions in the front end

Go to Applications > Documents

- Navigate to your chosen folder.
- On the right there will be a small arrow, click on this to bring up the drop down menu, as shown in Image 4.
- Click on "View/Edit Permissions".
- A pop up will appear where you can now change/assign permissions just like in Image 3.
- When complete, click "Apply permissions" and you will return to the documents screen.
- A green pop up will appear in the top right corner confirming that permissions have been updated.

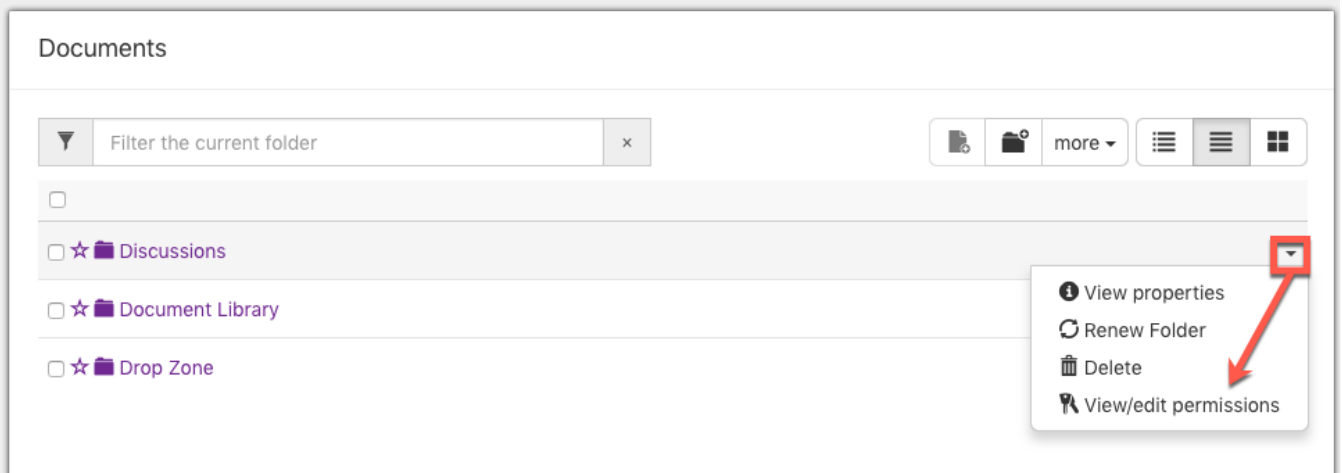


Image 4 - How to edit permissions for a folder from the front end

[Creating A Folder](#)

[Creating A Folder Structure](#)

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