



## Documents: Permissions explained

### Introduction

This article details the permissions available in the documents application.

An application administrator should set up permissions using the People roles and groups as required across folders and documents, as well as specify individual users where necessary.

This differing permissions structure across users will give or restrict access to folders and documents as well as determine the actions they can perform in the application.

An application administrator of Documents can change permissions from 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

### Permissions

A screenshot of the 'View/edit permissions' dialog box. It has a title bar with a close button. Inside, there's a checkbox for 'Inherit rights from parent folder'. Below it is a text input field with 'Start typing to add...' and 'Browse' and 'Remove' buttons. A dropdown menu is open showing 'All registered' (highlighted), 'Owner', and 'Role: Administrators'. 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's 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 are able to 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.
- **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 the folder making process, Claromentis has an 'inherit' option for permissions for subfolders.

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

View/edit permissions

☒ Inherit rights from parent folder

Start typing to add... Browse Remove

Owner  
Group: Marketing  
Role: Administrators

☒ View  
☐ Create Draft  
☒ Edit & Approve  
☒ Move/delete  
☒ Edit Metadata  
☒ Edit permissions

[View effective permissions...](#)

Apply permissions Close

Inheriting can be turned off 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 will 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 / Marketing / Add new Document

Files

Choose file

or select from pre-uploaded...

Tags

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

Workflow

-- None --

☒ Take responsibility

Review Date

Author

Select user

Browse

Related Documents

Select document

Add new

Description

☐ Inherit

Version comment

Permissions

☒ Inherit rights from parent folder

Start typing to add...

Browse

Remove

Owner

Group: Marketing

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.

### Related Article

[Creating A Folder](#)

[Creating A Folder Structure](#)