



Documents FAQ's

A user reports they cannot access a certain folder, how do I investigate this?

Access is controlled by permissions so if there are access issues it is likely the user is not included in view permissions for the folder either by their profile not be specified directly or via a role/group they are in.

An application administrator of People can head to the admin side of Documents, locate the folder in question and view its permissions.

If the user is not specified explicitly in permissions and the administrator is unsure if the user is included in the other roles/groups defined there, user membership can be checked.

An application administrator of People can look up the user and navigate to the groups/roles tab to check what membership the user has.

Cross-reference this with the entries made in the folder permissions.

If the user is not included in any roles or groups, is it appropriate to add them directly or one of the groups they are in and give permissions?

The administrator can choose the most suitable option to resolve based on your needs - ensure the user is included in permissions now, give them the correct abilities and save. The user should now be able to access the folder.

A user should have access to a certain folder, but not all documents within that folder, how do I set this up?

An administrator can navigate to the admin side of documents and locate the folder in question.

Expand its content using the small plus icon.

For a user to access a folder, they have been given permission to it already.

For each document within, different permissions can be specified to ensure only certain users that can access the folder can access specific files.

For each file you do not want everyone who can access the folder to see, edit its permissions and ensure firstly that these are not set to inherit.

Now start to add the users/roles/groups you do wish to have access and give them view rights etc. Once all have been added save this.

A key icon should appear next to the file on the admin side after saving, which indicates the permissions set on it differ from those set on the parent folder for easy identification.

Any user/role/group left out of these permissions can still access the folder as these rights did not change, but they will not see that file at all.

Remember that to select users/roles/groups in file permissions, they must first already have access to the parent folder otherwise they won't appear as selectable.

A user has checked out a document and someone else needs to check it out instead, how can we resolve this?

The options to resolve this are:

1- Contact the currently checked-out user and ask them to cancel this or complete the check-in process. Once complete this frees up the file for another person to check out.

2- An application administrator of Documents cancels the edit from the admin side, where all checked-out documents are listed. Once cancelled a different user can check out the document.

How can I move a document's location in the directory?

This can be done from either the front end of the application with end users that have this permission or from the administrative side by application administrators.

Select the checkbox against the content you wish to move and add it to the clipboard, the move option should appear.

More information here

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