

Overview

It is possible to add an extra layer of security to files and folders in the Documents application that goes beyond the standard permissions that are already set, and gives or restricts access to users/roles/groups.

This is achieved by applying classification levels to files, folders and users, then restricting certain levels to only be accessible from specific IP addresses/ranges. e.g. documents classified as 'Top Secret' can only be accessed when users (with standard permissions already to view these items) are an the office IP.

Please note: Application administrators of the Documents application will always be able to see all files and folders from the admin side, regardless of their classification level on the front end or the IP they are accessing from.

Request security level is enabled

The Document security level feature is disabled by default (as it is optional), so if you want to try this out, please raise asupport ticket requesting this, and we will enable it for your site.

Once this is enabled, it will display as 'ON' in Admin > Documents:

Admin	Admin > Docume	onts	
DOCUMENTS E Manage documents list UTILITES 순 Documents Import	ERMS features	ori Use ERMS records (ERMS_CONFIG_RECORD) ori Use ERMS markers (ERMS_CONFIG_RECORD_TYPES) on Use record types (ERMS_CONFIG_RECORD_TYPES) ori Use multi-component documents (ERMS_CONFIG_MULTICOMPONENT_DOCUMENT) on Use 'security levels' in permission system (ERMS_CONFIG_SECURITY_LEVEL)	
□+ Documents export 圓 Trash can		 Iso MD5 signature for documents (ERMS_CONFIG_MD5_SIGNATURE) Iso export/import for ERMS abjects (ERMS_CONFIG_EXPORT_IMPORT) Iso ERMS schedules (ERMS_CONFIG_SIERDUR) 	
Documents reports		on Use Google drive links (ERMS_CONFIG_EDOC_LINKS) on Use Microsoft OneDrive links (ERMS_CONFIG_ONEDRIVE_LINKS)	
CONFIGURATION	Statistics	Number of Documents	49

Considerations before set-up

There are several elements involved in setting up the security levels.

To ensure this achieves your goal, your team will need to confirm what you are trying to achieve by applying the levels to your documents and consider on what scale this is necessary for your directory.

Your team will also need to decide how they wish to restrict access (e.g. which IPs) and to which levels.

This will require collaboration between your site's application administrators of both Documents and People to ensure the changes you want to make can be applied (as these users have the right access to do so)

Classification labels

There are 5 labels, from low to high 'security', they are:



Your team can change the phrasing of each level in the localisation if you so wish in Admin > System > Localisation > Core apps and update each:

	G	25 hannahdv9-demo.myintranet.c	com/intranet/admin/util	s/msg_edit.php?edit_mode=m	tioed	* 8	1 - 20 -
mon.	perms,	_definitions	Show all				
tus	Type	Kery		Aux	English	U.S. International	Russian
	Im	common.perms_definitions.confidential			Confidential		Конфиденциаль
	Im	common.perms_definitions.restricted			Restricted		Ограниченный
	Im	common.perms_definitions.secret			Secret		Секретно
	Im	common.perms_definitions.top_secret			Top Secret		Совершенно се
	Im	common.perms_definitions.unclassified			Unclassified		Не классифици
	_		_				

Clear the site cache from Admin > System > Labs to ensure your changes apply.

Regardless, the default label titles selections cover the security levels that could be needed to complete the set up your company wants to implement.

- Applying classification labels to documents

An application administrator of Documents can set the security level for a folder or file by editing its permissions on the admin side, changing the field for this and saving:



If permissions are set to inherit, the security level will be inherited.

The security level can only be changed at sub-levels if permissions are not set to inherit.

To make the implementation efficient, start with the folder and file classification levels that will be restricted to IPs.

Once the security level feature is enabled, all folders and files are given the 'unclassified' label by default.

So, start updating the folders and files that will be the highest level restriction to this first and update the rest over time.

- Applying classification labels to users

An application administrator of People can access individual profiles from Admin > People, update their classification level in the field for this, and save.

Admin > People Control Panel > Edit user Info						1
🙎 Edit user info	ormation () Role	옲 Group	🖧 Org chart	() Other settings		
Access level	✓ Unclassified Restricted	1			🔀 Change image	
User code	Confidential			Ee	 Delete image 	
Last time login	Top Secret 12			12		
Account state	Enabled Oisable	d				
Assign user to extranet area	Primary Area	~		🗆 🗹 Email log-in de	tails	
Username *	abigail					
Password						
	Admin > People C C Edit user info Access level User code Last time login Account state Account state Account state Account state Account state Account state Account state Account state Account state Account state	Admin > People Control Panel > Edit use Catures Information © noise Access level User code Last time login Confidential Secret Last time login Confidential Secret Confidential Confidential Confidential Confidential Confidentia	Admin > People Control Panel > Edit user info Catule user information Catule and Control Panel > Edit user info Access level User code Control Panel C	Admin > People Control Panel > Edit user info	Admin > People Control Panel > Edit user Info	Admin > People Control Panel > Edit user info

To make the implementation efficient, start with the user classification levels that will be restricted to IPs.

Once the security level feature is enabled, all users are given the 'unclassified' label by default.

So, start updating the users who will be the highest level restriction to this first and update the others over time.

- Applying classification labels to IP addresses

An application administrator of People can navigate to Admin > People > Configure IP ranges:

Admin	Admin > Pec	ple Control Panel						1 1
🔁 Staff list	A Users	2 Power users	@ Roles දු	오 Groups	Password policy			
12 Add a new user					~ Q			
Disport users	All A B C	DEFGHIJI	(L M N O P Q	R S T U V	W X Y Z	↓↑ First n	iame, Surna	me
CSV file	Photo	Full name +	Job Title	Role	Group	Last 1	ime login	
CONFIGURATION General configuration	ê 👰	Abigail Clark	Human Resources Assistant	none	Company, Resources, Developme	Human 22-04 Learning and 10:02 ant	1-2025	
i≡ Configure user profile fields	2 🧕	Alan Metcalfe	Sales Assistant	none	Company,	Sales 17-04	-2025 17:17	
Configure IP	8 🔮	Alison Kelly	Human Resources Assistant	none	Company,	Human Resources 26-09 15:45	5-2020	
S Configure Skills	۵ ۵	Amelia Jackson	Human Resources Assistant	none	Company,	Human Resources 24-07 15:50	7-2020	

Here, they can enter the desired IP ranges and choose the security level of documents that will be accessible when on that IP.

e.g. in the below example, users that have 'Top Secret' classification (the highest level) set on their profile will only be able to open files/folders with that classification when on the Office IP. Whereas all documents that are 'unclassified' (the lowest level, which is applied by default after the feature has been enabled) are accessible on any IP.

Admin	Admin > People Control Panel >	Configure IP ranges		4				
愛 Staff list UTIUTIES 4월 Add a new user ⓒ Export users	Each ip range (intranet, office, em For example, company intranet h 'Restricted' level. When user logs in from some con computer's ip. NB: if there are firewall or proxy be	ployee's home, campus, etc) can be as 'Top secret' level, some departme nputer, their security level will be calc stween intranet webserver and user's	restricted to certain security level. Int restricted to "Confidentional" level, entire world h culated as lower of their own security level and secu computer, firewall ip will be taken.	as rity level o				
Add/update from CSV file	Description Unclassified V							
Synchronize/Update users from user	Description	Security level limit	IP range	10)				
CONFIGURATION	Office Only	Top Secret	× 67.186.21.173 - 67.186.21.173					
l ^{General} configuration	Entire world	Unclassified	~ 0.0.0.0 - 255.255.255.255					
⊞ Configure user profile fields	Save Delete selected							
Configure IP								

Standard permissions applied to folders and files still apply; a user will only be able to see documents they have permissions for.

The document security level is simply another layer on top that can prevent access to the content from IPs outside those configured.

Once the security levels have been set across your folders and files, and the IP configuration area has the desired ranges entered against each level, you are ready to test.

Have a user access your Intranet from certain IPs to check what they can/can't access in Documents is in line with the configuration you have created.

Tweak the IP configuration area based on this.

Edit or remove the configuration

An application administrator of People can edit the configuration at any time from Admin > People > Configure IP ranges.

The levels and IP ranges they are restricted to can be changed freely or deleted.

They can also update the user classification level on their profiles.

An application administrator of Documents can update and manage the classification level of files and folders over time.

If you wish to turn the security level feature off entirely (rather than just removing all the configuration in the IP area) please raise asupport ticket for us to assist with this.

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