

Documents Admin: Manage Documents List

This article is for application administrators of Documents.

A sysadmin of your site can make you an administrator if you are not already.

This means you can access the **Applications > Admin > Documents > Manage Documents** list pathway.

Overview

From this area, an overview of the whole directory is given, and an application administrator can see every folder and file from the admin side without requiring front-end permissions.

For this reason, administrators of Documents should be carefully chosen by your team, as those responsible will have access to all uploaded files with full control to modify or delete.

This guide will cover what actions an administrator of Documents can carry out from the 'Manage Documents List' area.

A general overview of the Admin > Documents landing page is given here

Viewing the Directory

The Applications > Admin > Documents > Manage Documents list pathway:

A screenshot of the Documents Admin interface. The top navigation bar shows 'Admin / Documents'. The main content area is divided into three sections: 'ERMS features', 'Statistics', and 'Documents'. The 'ERMS features' section contains a list of toggle switches for various features. The 'Statistics' section contains a table with document statistics. The 'Documents' section contains a list of links, with 'Manage documents list' highlighted by a red box. The 'Utilities' section contains links for document import, export, trash, reports, and permissions. The 'Configuration' section contains links for general configuration, metadata, record types, templates, and Google authentication.

ERMS features	
<input type="checkbox"/>	Use ERMS records (ERMS_CONFIG_RECORD)
<input type="checkbox"/>	Use ERMS markers (ERMS_CONFIG_MARKERS)
<input type="checkbox"/>	Use record types (ERMS_CONFIG_RECORD_TYPES)
<input type="checkbox"/>	Use multi-component documents (ERMS_CONFIG_MULTICOMPONENT_DOCUMENT)
<input type="checkbox"/>	Use 'security levels' in permission system (ERMS_CONFIG_SECURITY_LEVEL)
<input type="checkbox"/>	Use MD5 signature for documents (ERMS_CONFIG_MD5_SIGNATURE)
<input type="checkbox"/>	Use export/import for ERMS objects (ERMS_CONFIG_EXPORT_IMPORT)
<input type="checkbox"/>	Use ERMS schedules (ERMS_CONFIG_SCHEDULE)
<input type="checkbox"/>	Use Google drive links (ERMS_CONFIG_GDOC_LINKS)
<input type="checkbox"/>	Use Microsoft OneDrive links (ERMS_CONFIG_ONEDRIVE_LINKS)

Statistics	
Number of Documents	86
Number of all versions of documents	91
Number of checked out documents	0
Total space occupied by documents	401.65 Mb
Number of deleted documents and folders	0
Size of deleted documents	0 Bytes

Documents

- Manage documents list

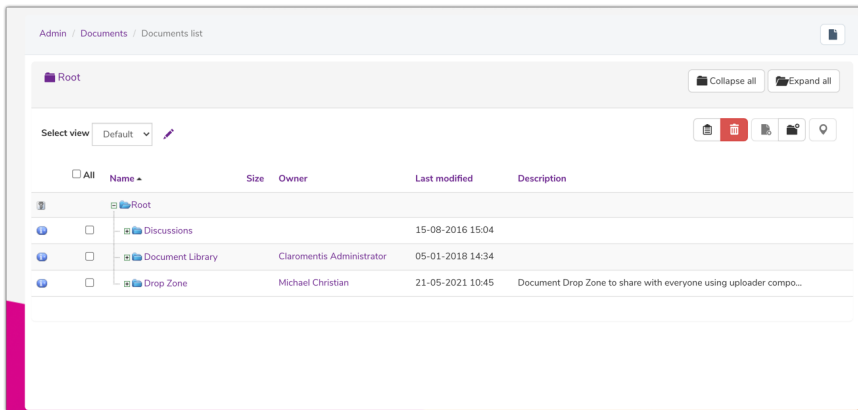
Utilities

- Documents import
- Documents export
- Trash can
- Documents reports
- Documents permissions report

Configuration

- General configuration
- Metadata
- Record types
- Templates
- Google authentication

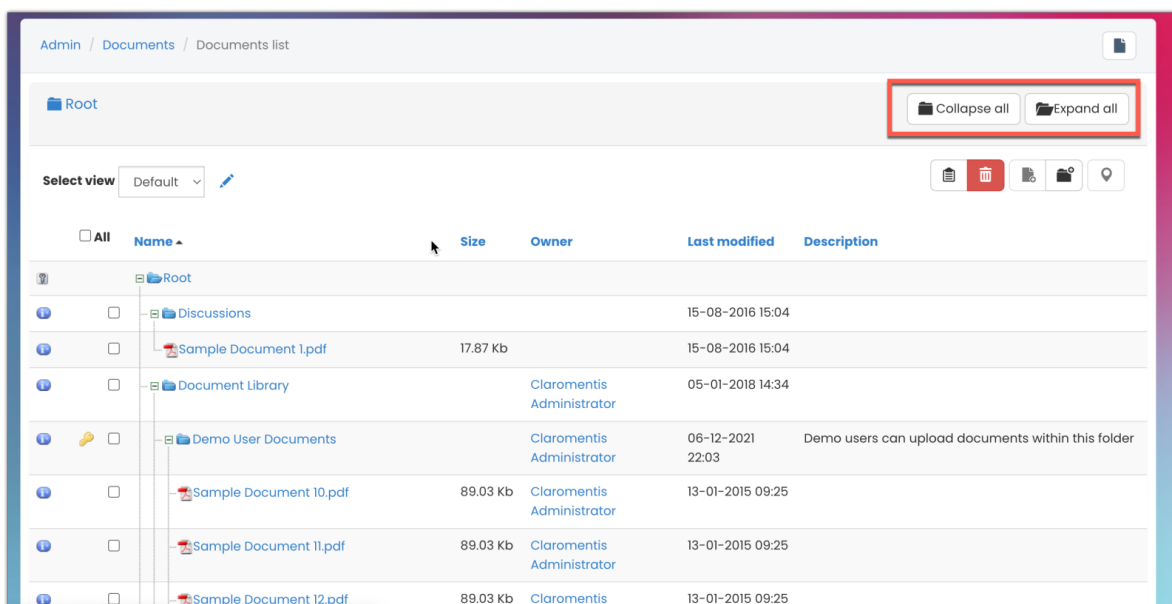
The overarching directory is revealed:



Here an administrator of Documents can manage files and folders.

They do not require front-end permissions to content, instead they can access everything from the admin side.

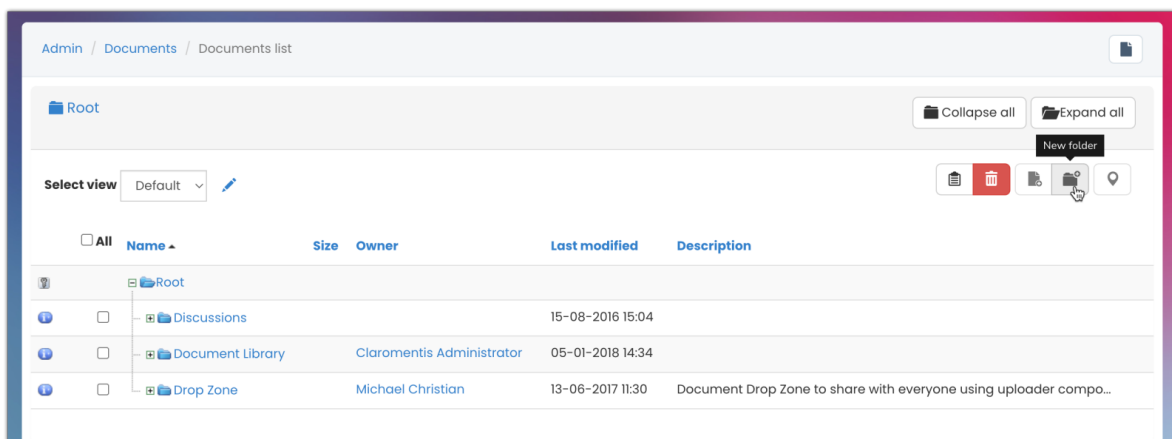
The directory appears as a tree diagram with the ability to expand or collapse its sections to allow for changes.



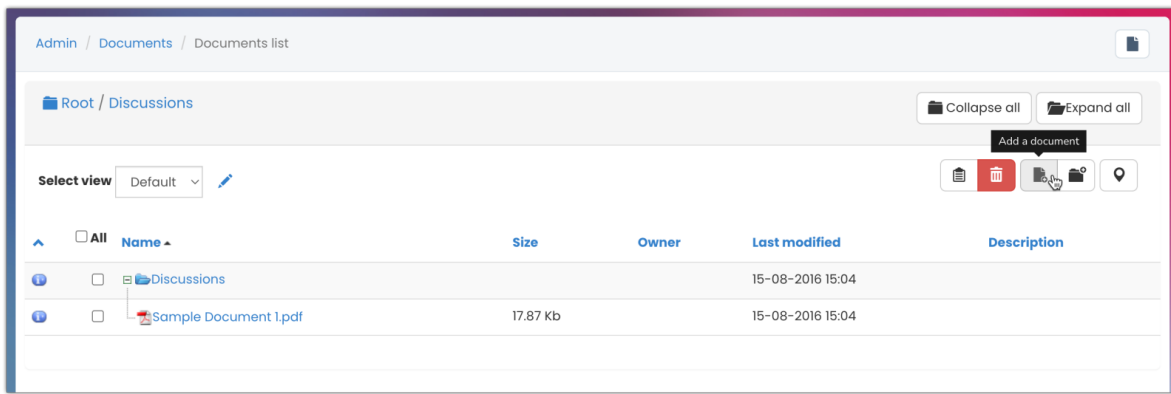
Making changes

Most actions that can be performed on the front end can be carried out on the admin side.

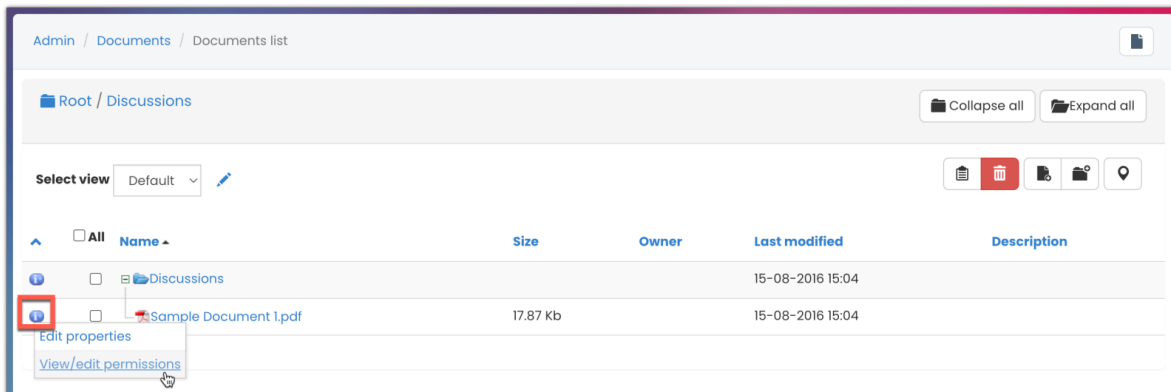
e.g. New folders can be created



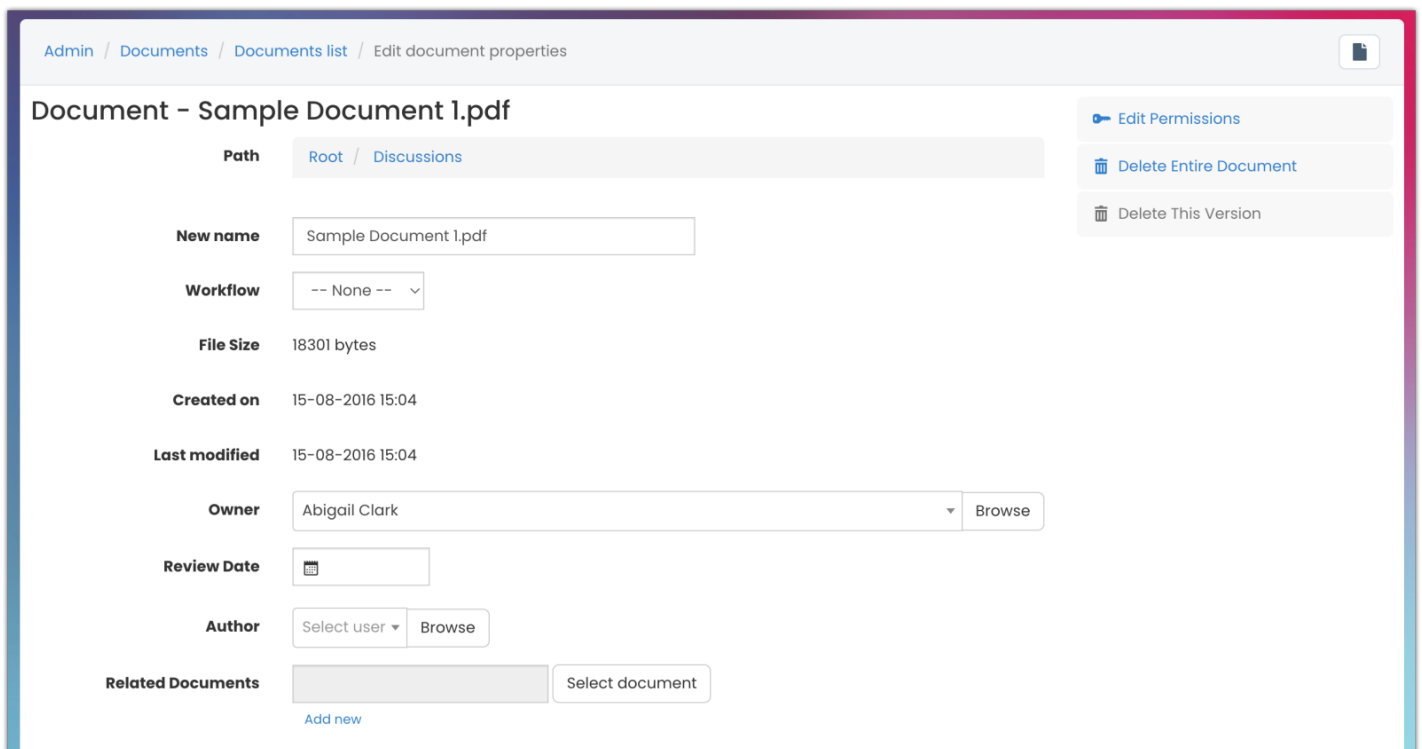
Files can be uploaded



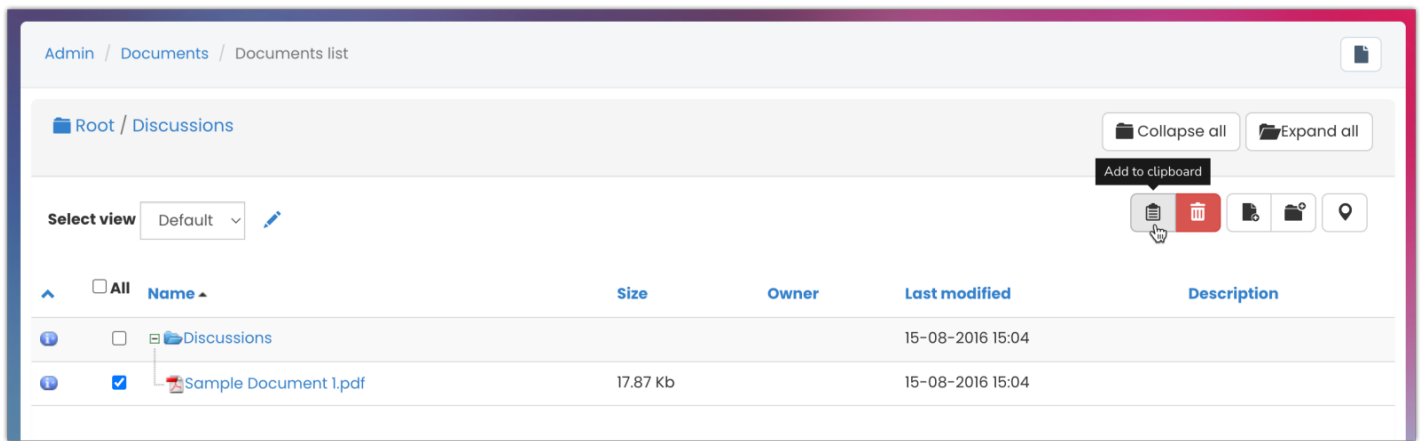
Permissions changes made to folders or files using the 'i' icon



As well as editing properties:



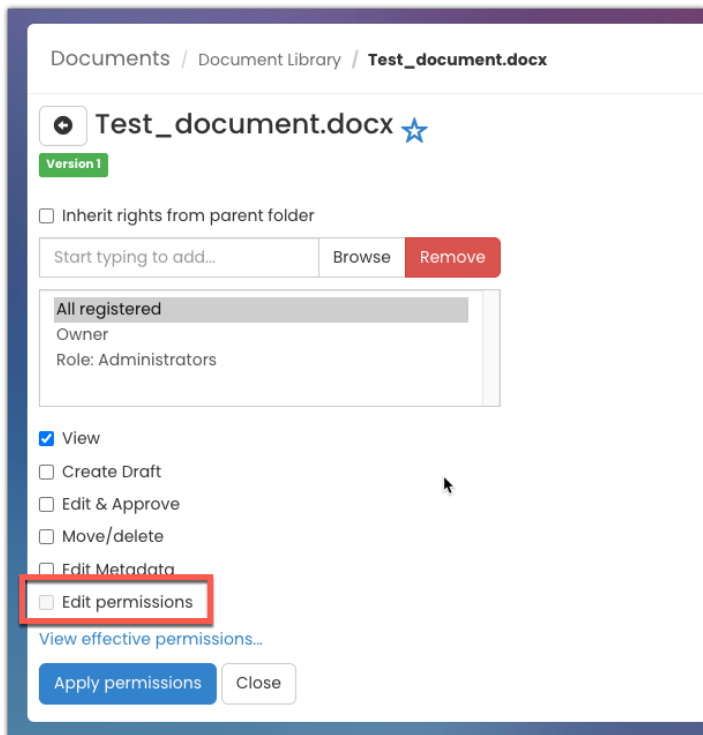
The location of folders and files can be changed using the clipboard function on the admin side, which is covered in more detail here.



'Edit Permissions' permission

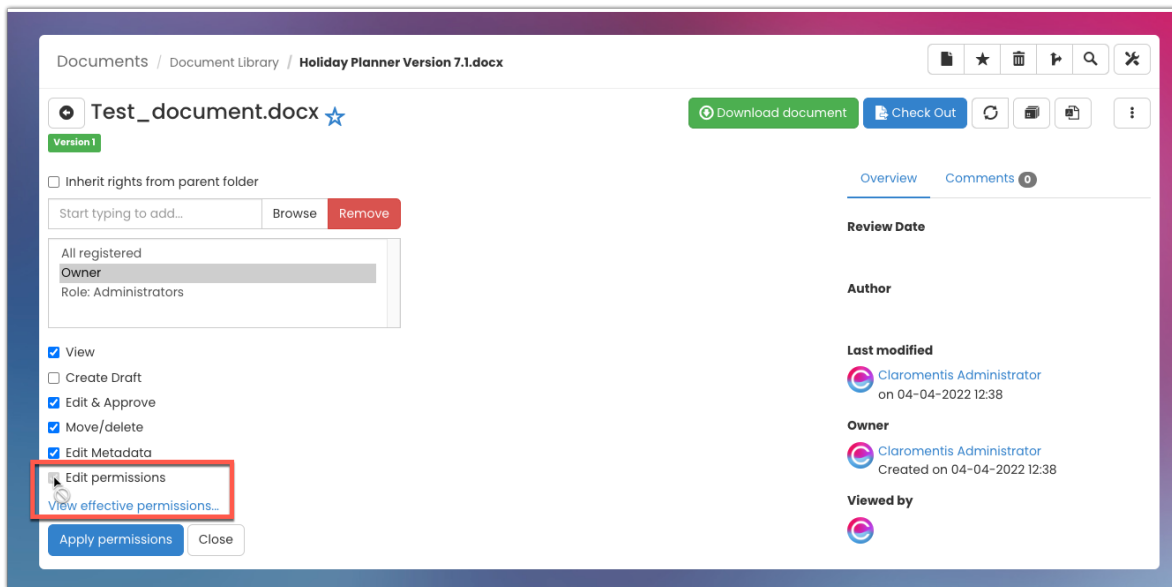
One action that is particular to the admin side only, is the ability to give users/roles/groups the 'edit permissions' permission.

This essentially means, 'Can this user edit folder/file permissions from the front end?'



As this is quite a big responsibility, because it allows user access to be changed, it can only be given by an administrator on the admin side.

Attempting to change this permission on the front end will not be permitted (even by an administrator)



Therefore, if front-end updates to this permission need to take place, an administrator of Documents will need to carry this out.

Once saved users defined will be able to edit permissions to the specified files/folders from the front end without being an administrator.

Created on 17 May 2021 by Hannah Door. Last modified on 30 November 2023

Tags: documents, folder, permissions, administrator, files