

Documents: Assigning permissions on the admin side

This guide shows how an Application Administrator can update permissions on Folders and files from the administrative side.

For more information on the permissions themselves and what each means, see our Permissions Explained guide.

Reminder \triangle

If a User/Group/Role is not appearing as selectable in a subfolder or document permissions, it is likely they have not been predetermined in the Parent folder permissions or were left out at some point in the folder levels above the one being modified.

In these situations, check the folder permissions of levels higher in the directory to highlight where the lack of definition for your desired User/Group/Role starts and rectify this by adding them in.

They will become available for selection in the lower levels following this.

Assigning permissions on the admin side

Only application administrators will be able to make changes from this pathway.

```
Go to Applications > Admin > Documents > Manage Documents List
```

There are 3 main elements that an administrator can change permissions for:

- 1. Root level of the directory
- 2. Folders
- 3. Documents

Permission to make changes at the root

This relates to a user being able to add new folders at the root level.

- Without these permissions, users can only add folders/files within folders already created.
- This allows administrators or defined responsible users to control the highest level of the directory.
- This ensures the core of the directory is stable, can only be accessed by those authorised, and is not susceptible to erroneous changes by users without proper knowledge.

Admin	Admin > Documer	nts > Documents list				ł	
DOCUMENTS	E Root Expand all						
UTILITIES -윈 Documents import	Select view De	fault ~ 🗹					
\Box Documents export	🗆 All	Name - Siz	e Owner	Last modified	Description		
🔟 Trash can	2	🖻 🗁 Root					
Documents reports	①	- 🗉 🖿 Discussions	Claromentis Administrator	15-08-2016 15:04			
permissions report	(i)	– 🗉 💼 Document Library	Claromentis Administrator	16-10-2023 13:07			
$\int \!$	(i)	🗉 🖿 Drop Zone	Michael Christian	09-08-2024	Document Drop Zone to share with everyone using		
🔛 Metadata				11:02	uploader compo		
Record types							

The icon highlighted above is where permissions to edit the root level can be carried out.

Add in User/Group/Role as required to this area and click Apply permissions to save this.

Admin > Admin > Documents > Documents list > Edit rights to add top-level folders	
Start typing to add Browse Remove	
Role: Administrators	
Apply permissions Close	

Those defined will be able to add new folders at the root level.

These permissions can be altered by an application administrator when needed over time.

Changes to folder permissions

Please note: Document application specifically - when making changes to the top-level folders, removing 'All registered' from the root will remove all instances of Group/Role related down the subfolder levels e.g. the loss of a lot of permissions at every lower level. If you require changes to Document permissions, start from the lowest level in the directory and work upwards making permissions alterations towards the parent folder/root - this will retain permissions and avoid access losses.

From the Manage Documents List area, navigate to the folder or subfolder you wish to make changes to.

Click the blue i icon in line with the desired folder and select View/edit permissions.

Admin	Admin > Docume	ents > Documents list				
DOCUMENTS	🛅 Root				Collapse all 🖨 Expand all	
UTILITIES - 쥔 Documents import	Select view Default -> 🗹					
\Box Documents export	🗆 All	Name -	Size Owner	Last modified	Description	
🔟 Trash can	2	⊨ Root				
Documents reports	()	– 🗉 📄 Discussions	Claromentis Administrator	15-08-2016 15:04		
permissions report	()	– 🗷 💼 Document Library	Claromentis Administrator	16-10-2023 13:07		
🎾 General configuration	1	🗉 🖻 Drop Zone	Michael Christian	09-08-2024	Document Drop Zone to share with everyone using	
💷 Metadata	Edit properties	issians		11:02	uploader compo	
Record types	view/edit perm	NISSIONS (
Templates						

On the next screen permissions for that folder can be edited.

View/edit per	missions	
Location	Root > Drop Zone	
Permissions	Start typing to add	Browse Remove
	All registered Owner Role: Administrators	
	 View Create Draft Edit & Approve Move/delete Edit Metadata Edit Metadata 	
	View effective permissions	

Click Apply permissions to save, user access will update in line with this.

Please note: If permissions for the document are set to inherit, further changes can only be made by deselecting the inherit option.

Changes to Document permissions

From the Manage Documents List area, navigate to the document you wish to make changes to.

Use the Expand all button to reveal the whole directory and assist in searching for a document's title.

Click the blue i icon in line with the desired folder and select View/edit permissions.

Admin	Admin > Documents > Documents list					
DOCUMENTS	Root				E] Collapse all 🕒 Expand all
UTILITIES - 뒨 Documents import	Select view Defa	Select view Default -> D				
⊖ Documents export	🗆 All	Name 🔺	Size	Owner	Last modified	Description
🛍 Trash can	2	🗏 💼 Root				
Documents reports	í) 🗆	- 🗃 💼 Discussions		Claromentis Administrator	15-08-2016 15:04	
permissions report	(j) 🗆	Sample Document 1.pdf	17.87 Kb		15-08-2016 15:04	
ℬ General configuration IIII Metadata	i	– 🗃 💼 Document Library		Claromentis Administrator	16-10-2023 13:07	
Record types	(i)	- 🗄 💼 Certificates		Claromentis Administrator	16-10-2023 13:07	
Templates Google authentication	1	-SISO-9001-and-27001-website.png	27.28 Kb	Claromentis Administrator	16-10-2023 13:07	
	i D Edit properties	so-badges.png	1.06 Mb	Claromentis Administrator	16-10-2023 13:07	
	View/edit permissi	🛞 – 🕫 💼 Demo User Documents		Claromentis Administrator	12-07-2024 12:09	Demo users can upload documents within this folder
	(i)	-ZSample Document 10.pdf	89.03 Kb	Claromentis Administrator	13-01-2015 09:25	
	①	-ZSample Document 11.pdf	89.03 Kb	Claromentis Administrator	13-01-2015 09:25	
	(i)	-ZSample Document 12.pdf	89.03 Kb	Claromentis Administrator	13-01-2015 09:25	

On the next screen permissions for the document can be edited:

Admin > Docu	ments > Documents list > Edit docume	nt properties > Edit permissions	
View/edit per	missions		
Location	Root > Document Library >	Certificates > iso-badges.png	
Permissions	Inherit rights from parent for	lder	
	Start typing to add	Browse Remove	
	All registered Owner Role: Administrators		
	View Create Draft Edit & Approve Move/delete Edit Metadata Edit permissions		
	View effective permissions		
	Apply permissions Close		

Click Apply permissions to save, user access will update in line with this.

Please note: If permissions for the document are set to inherit, further changes can only be made by deselecting the inherit option.

'Edit Permissions' permission

One action that is particular to the admin side is the ability to give users/roles/groups the Edit permissions permission.

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

Admin > Documents > Documents list > Edit document properties > Edit permissions						
View/edit perr	nissions					
Location	Root > Document Library > Human Resources > Health and Safety.pdf					
Permissions	Inherit rights from parent folder					
	Start typing to add Browse Remove					
	All registered Owner Group: Human Resources Role: Administrators					
	 View Create Draft Edit & Approve Move/delete Edit Metadata Edit permissions View effective permissions 					

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

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

claromentis	Q What are you looking for?	፼ 11:45 cp 仄 ⅲ Q ² 発 🜔	
Home Company V Department V Dashboards V E-Form Examples V Learning	Projects Book a Demo		
Documents > Document Library > Human Resources > Health and Safety.pdf		:	
← Health and Safety.pdf ☆		다 Download ⑦ Check Out	
Version 2			
Inherit rights from parent folder		Overview Comments 1	
Start typing to add Browse Remove		Review Date	
All registered			
Owner Group: Human Resources		Author	
Role: Administrators			
✓ View □ Create Draft		Last modified	
Edit & Approve		Claromentis Administrator	
Move/delete Edit Metadata		on 05-04-2022 10:55	
Edit permissions		Owner	
View effective permissions	Claromentis Administrator		
Apply permissions Close		Created on 06-05-2015 16:44	
		Viewed by	

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.

We recommend only giving responsible users and/or Document administrators the 'edit permission' ability.

Key symbol

From the admin side, this indicates a folder or document's permissions are not set to inherit.

This helps to visually identify where certain Users/Groups/Roles you are updating permissions for will not have access and facilitates investigations into making changes between folder levels to include them.

Admin	Admin > Documents list					
DOCUMENTS	Proot			🗎 Collapse all 🕒 Expand all		
UTILITIES - 윤 Documents import	Select view D	fault - 🗹				
\rightarrow Documents export	□ All Name ► Size Owner Last modifier				Description	
🕅 Trash can	2	⊟ B oot				
Documents reports	(j)	☐ — ⊞ 🖨 Discussions	Claromentis Administrator	15-08-2016 15:04		
permissions report	(j)] — 日 🍋 Document Library	Claromentis Administrator	16-10-2023 13:07		
ℬ General configuration ∰ Metadata	()	🛛 — 🛛 🖨 Certificates	Claromentis Administrator	16-10-2023 13:07		
Record types	í) 🤌) — 🛛 🗃 Demo User Documents	Claromentis Administrator	12-07-2024 12:09	Demo users can upload documents within this folder	
Google authentication	 <i>></i>) — 🗉 📷 Human Resources	Claromentis Administrator	05-04-2022 10:55		
	 <i>></i>) — 🗉 🧰 Marketing	Claromentis Administrator	17-07-2017 10:28		
	()	🗋 — 🖻 💼 Projects	Michael Hassman	05-06-2017 12:36		
	 <i>></i>) — 🗉 🧰 Sales	Claromentis Administrator	14-08-2017 09:40		
	(i)) — 🖻 💼 Templates	Claromentis Administrator	27-10-2017 14:39		
	()) — 🖻 🧰 User Guides	Claromentis Administrator	09-08-2024 14:14		
	()) — 🖪 🧰 Videos	Claromentis Administrator	05-05-2015 17:52		
	()	Using an Agile Approach in a Large, T 39.37 Kb	Claromentis Administrator	19-09-2017 21:29		
	(j)	🛛 🕒 🛚 🖀 Drop Zone	Michael Christian	09-08-2024 11:02	Document Drop Zone to share with everyone using uploader compo	

e.g. In the above example, 4 folders out of 9 within the 'Document Library' parent folder are not set to inherit its permissions, as denoted by the key symbol.

Subsequently, we also know that the 5 folders without the key symbol match the permissions on 'Document Library'.

If there is an access or permission issue for a user within the 'Document Library' folder, the key symbol assists with investigations to rectify and identify where the user is potentially missing or at which level they lack permissions.

Last modified on 8 January 2025 by Veronica Kim

Created on 9 August 2024 by Hannah Door Tags: documents, permissions, user