



## 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

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](#)**

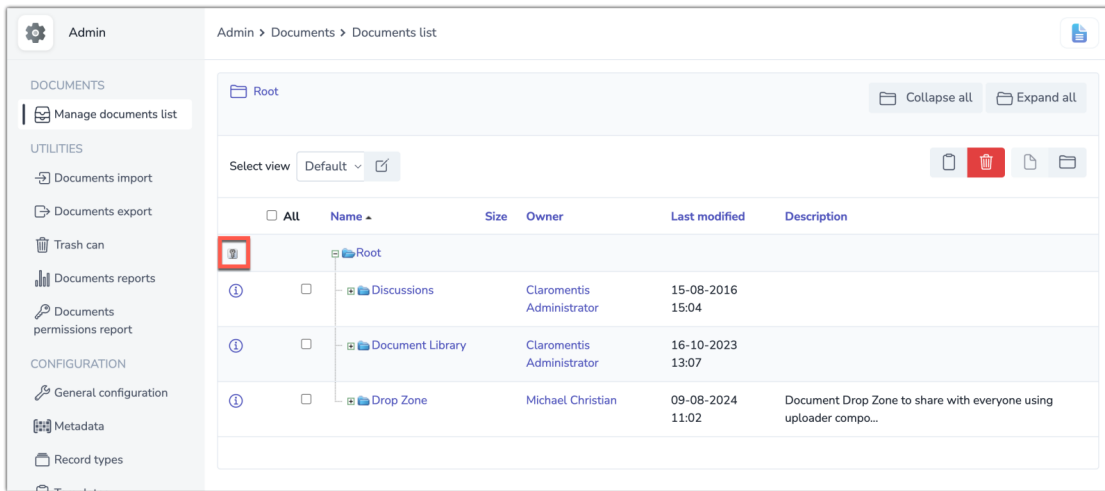
There are 3 main elements that an administrator can change permissions for:

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

### Permission to make changes at the root

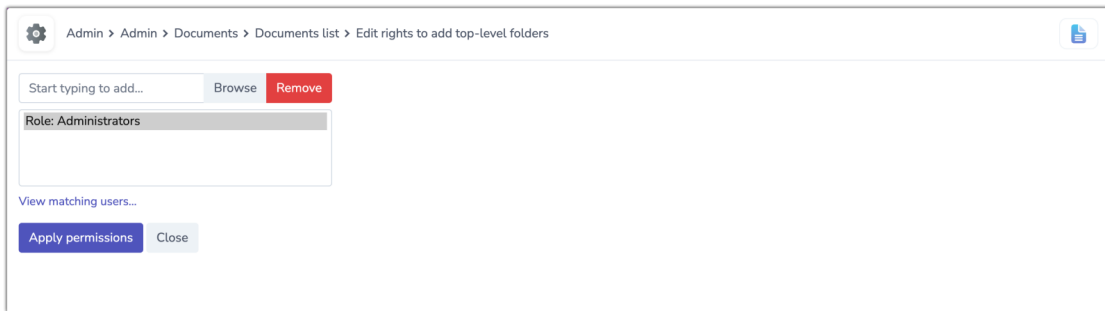
This relates to a user being able to add new folders at the root level.

- 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.



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.



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

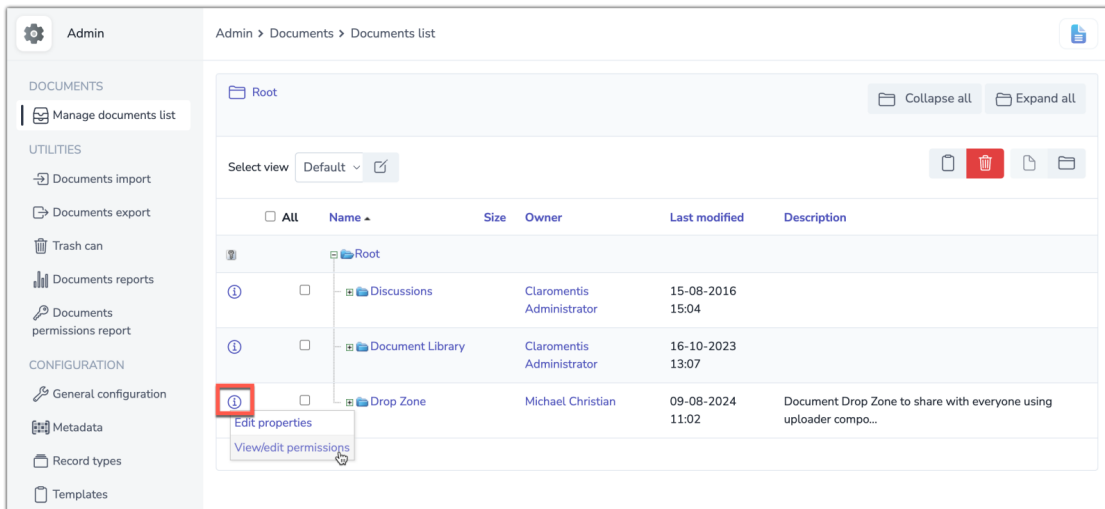
These permissions can be altered by an application administrator when needed over time.

## 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**.



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



Admin > Documents > Documents list > Edit folder properties > Edit permissions



## View/edit permissions

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 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.

## 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

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

Admin > Documents > Documents list

Root

Collapse all

Expand all

Select view

Default

	All	Name	Size	Owner	Last modified	Description
		Root				
		Discussions		Claromentis Administrator	15-08-2016 15:04	
		Sample Document 1.pdf	17.87 Kb		15-08-2016 15:04	
		Document Library		Claromentis Administrator	16-10-2023 13:07	
		Certificates		Claromentis Administrator	16-10-2023 13:07	
		ISO-9001-and-27001-website.png	27.28 Kb	Claromentis Administrator	16-10-2023 13:07	
		iso-badges.png	1.06 Mb	Claromentis Administrator	16-10-2023 13:07	
		Demo User Documents		Claromentis Administrator	12-07-2024 12:09	Demo users can upload documents within this folder
		Sample Document 10.pdf	89.03 Kb	Claromentis Administrator	13-01-2015 09:25	
		Sample Document 11.pdf	89.03 Kb	Claromentis Administrator	13-01-2015 09:25	
		Sample 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 > Documents > Documents list > Edit document properties > Edit permissions

### View/edit permissions

Location: Root > Document Library > Certificates > iso-badges.png

Permissions

☒ Inherit rights from parent folder

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 permissions

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

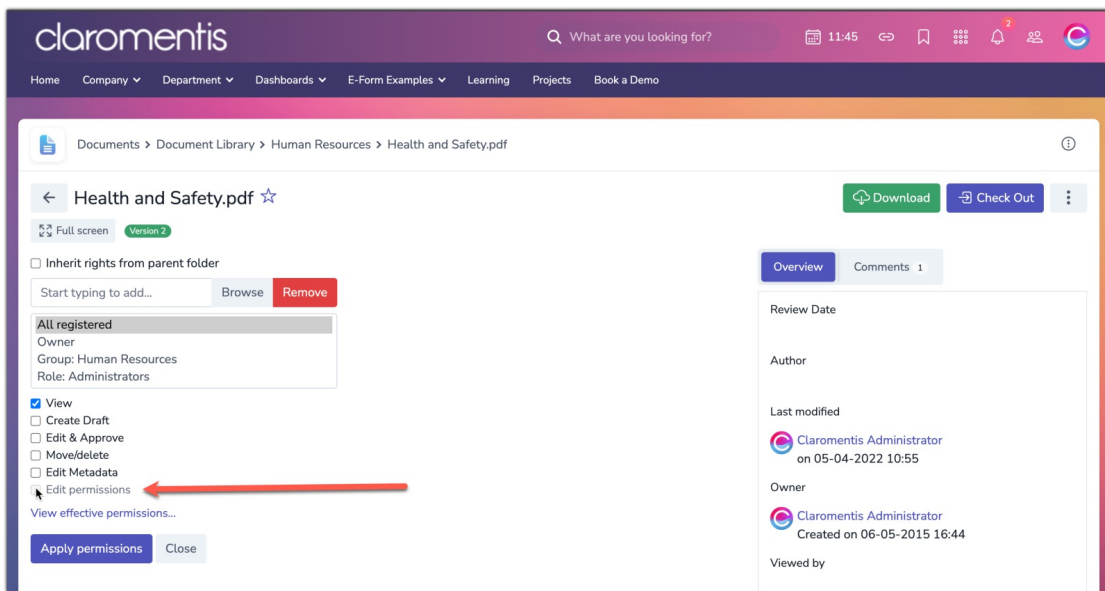
☒ View  
☐ Create Draft  
☒ Edit & Approve  
☒ Move/delete  
☒ Edit Metadata  
☒ Edit permissions

[View effective permissions...](#)

Apply permissions Close

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)



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

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Manage documents list

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Documents reports

Documents permissions report

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Admin > Documents > Documents list

Root

Collapse allExpand all

Select viewDefault

All

Name

Size

Owner

Last modified

Description

		Root				
		Discussions		Claromentis Administrator	15-08-2016 15:04	
		Document Library		Claromentis Administrator	16-10-2023 13:07	
		Certificates		Claromentis Administrator	16-10-2023 13:07	
		Demo User Documents		Claromentis Administrator	12-07-2024 12:09	Demo users can upload documents within this folder
		Human Resources		Claromentis Administrator	05-04-2022 10:55	
		Marketing		Claromentis Administrator	17-07-2017 10:28	
		Projects		Michael Hassman	05-06-2017 12:36	
		Sales		Claromentis Administrator	14-08-2017 09:40	
		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	
		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.