



Documents: Assigning permissions on the admin side

This guide shows how to update permissions on Folders and Documents from the admin side.

For more information on the permissions themselves and what each means, see our guide [here](#)

Reminder

If a user/group/role is not appearing as selectable in a subfolder or document permissions when you are editing them, 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/role/group 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

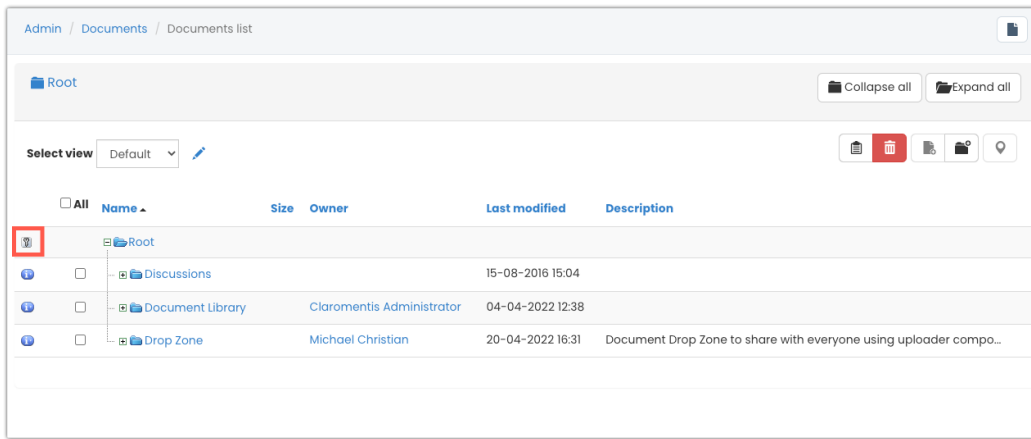
There are 3 main elements that an administrator can change permissions for:

- The root level of the directory
- Folders
- Documents

Permissions to make changes at the root

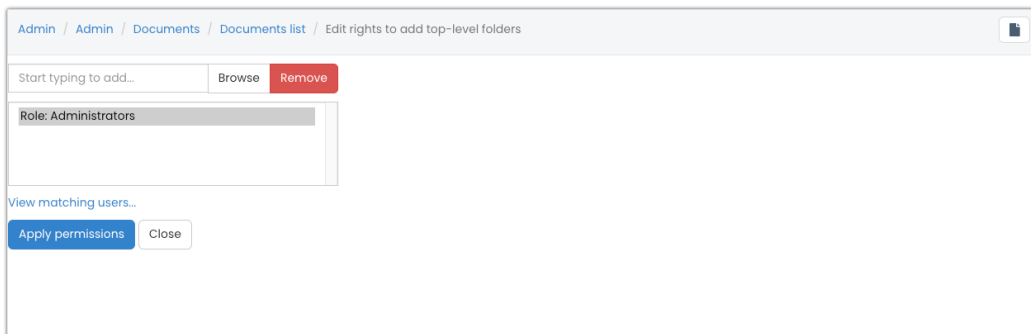
This relates to a user being able to add new folders at the root level.

- 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 users/roles/groups as required to this area and click 'apply permissions' to save this.



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

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

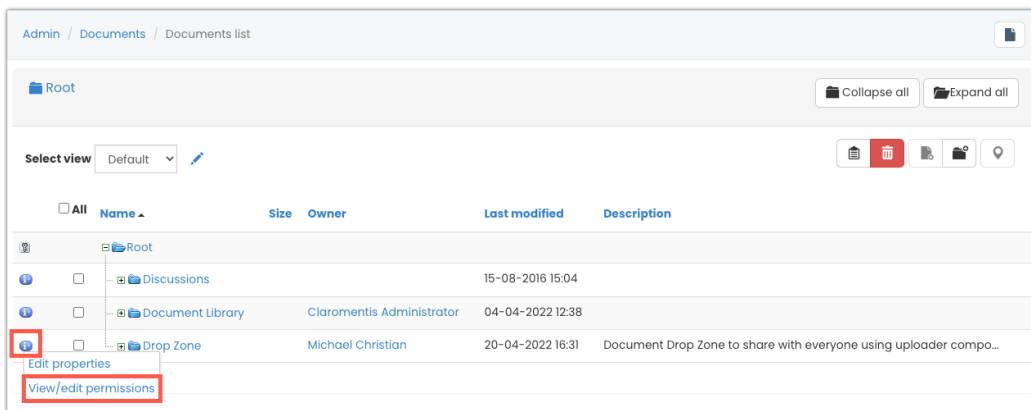
Changes to folder permissions

Please note - Document application specifically - when making changes to the top-level folders, removing 'All registered' from the root will remove all instances of groups/roles 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 to reveal two options.

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 [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 editing permissions on a subfolder, permissions may be set to inherit and impact the changes you can make and how best to make them.

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 and therefore location if you are unsure.

Admin / Documents / Documents list

[Root](#) [Collapse all](#) [Expand all](#)

Select view [Default](#)

☐ All [Name](#) [Size](#) [Owner](#) [Last modified](#) [Description](#)

Root					
Discussions				15-08-2016 15:04	
Document Library			Claramentis Administrator	04-04-2022 12:38	
Drop Zone			Michael Christian	20-04-2022 16:31	Document Drop Zone to share with everyone using uploader compo...
2015-05			Michael Christian	17-08-2015 11:02	Document Drop Zone to share with everyone using uploader compo...
2015-08			Claramentis Administrator	17-08-2015 11:02	Document Drop Zone to share with everyone using uploader compo...
nigel and someone			Nigel Davies	07-10-2016 16:31	Document Drop Zone to share with everyone using uploader compo...
dashboard.png	8.44 Kb	Nigel Davies	06-10-2016 10:56	This is a page about a dashboard	
rose1.JPG	265.71 Kb	Nigel Davies	06-10-2016 10:57	Rose picture	
Sample Document 10.pdf	89.03 Kb	Claramentis Administrator	20-04-2022 16:31		
is a test.ppsx	32.65 Kb	Claramentis Administrator	13-06-2017 11:30		

Click the blue 'i' icon in line with the desired folder to reveal two options.

Select 'view/edit permissions'.

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 / Drop Zone / Sample Document 10.pdf

Permissions

☒ Inherit rights from parent folder

Browse Remove

Public

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: Check if permissions for the document are set to inherit as this may impact the changes you can make and how best to make them.

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 facilitate investigations into making changes between folder levels to include them.

Admin / Documents / Documents list

Root

Collapse all Expand all

Select view Default

☐ All

	Name	Size	Owner	Last modified	Description
	Root				
	Discussions			2016/08/15 15:04	
	Sample Document 1.pdf	17.87 Kb		2016/08/15 15:04	
	Document Library		Claromentis Administrator	2021/03/03 11:46	
	Human Resources		Claromentis Administrator	2017/06/12 14:53	
	Marketing		Claromentis Administrator	2021/03/18 15:51	
	Projects		Michael Hassman	2017/06/05 12:36	
	Sales		Claromentis Administrator	2017/08/14 09:40	
	Templates		Claromentis Administrator	2017/10/27 14:39	
	User Guides		Claromentis Administrator	2015/04/30 13:37	
	Videos		Claromentis Administrator	2015/05/05 17:52	
	2017-05-31_13-13-06.png	18.23 Kb	Michael Hassman	2017/06/29 14:14	
	Using an Agile Approach in a Large, T...	39.37 Kb	Claromentis Administrator	2017/09/19 21:29	
	Drop Zone		Michael Christian	2021/03/05 11:03	Document Drop Zone to share with everyone using uploader compo...