



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

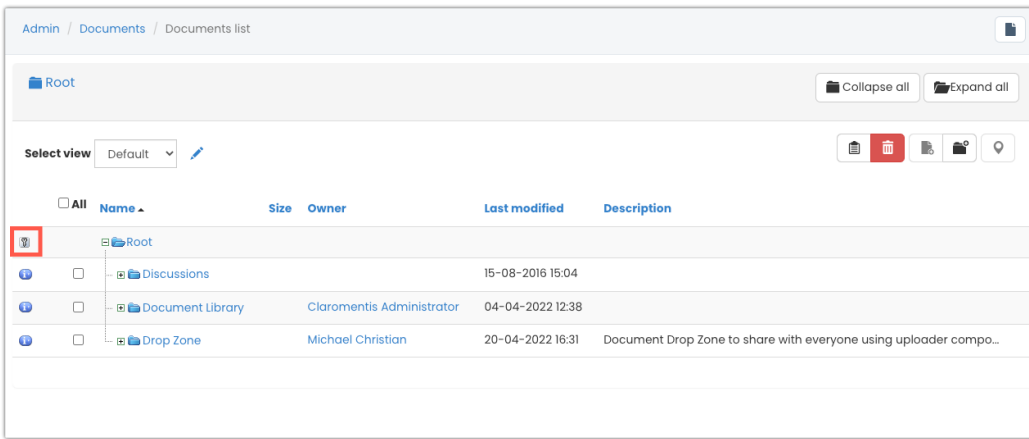
There are 3 main elements that an administrator can change permissions for:

- The root level of the directory
- Folders
- Documents

Permissions to make changes at the root

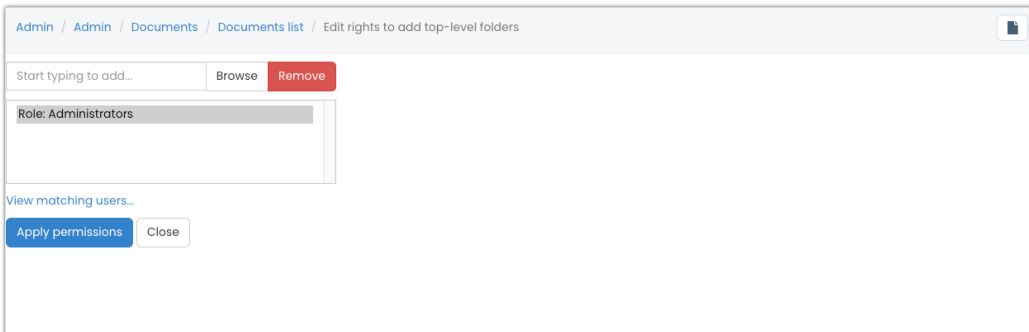
This relates to a user being able to add new folders at the root level.

- 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.

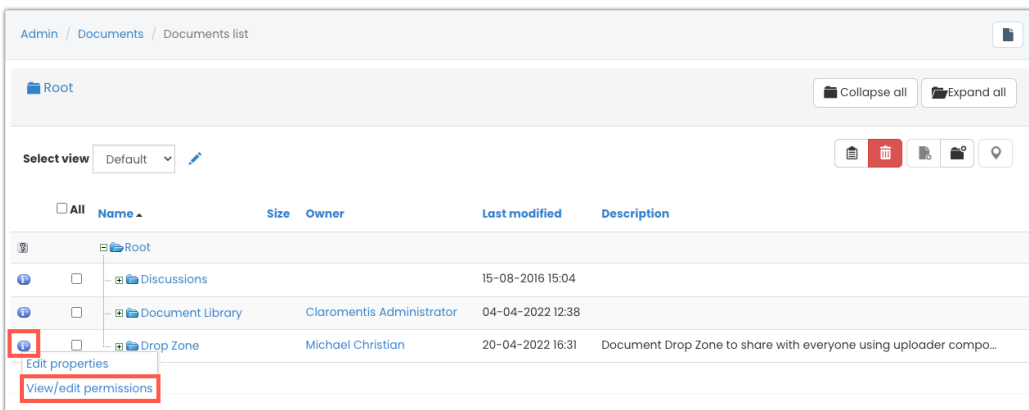
Changes to folder permissions

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.

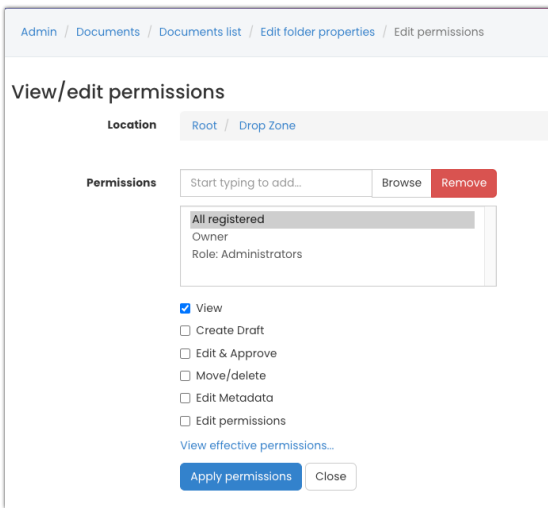
From the 'Manage Documents List' area, navigate to the folder or subfolder you wish to make changes to.

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.



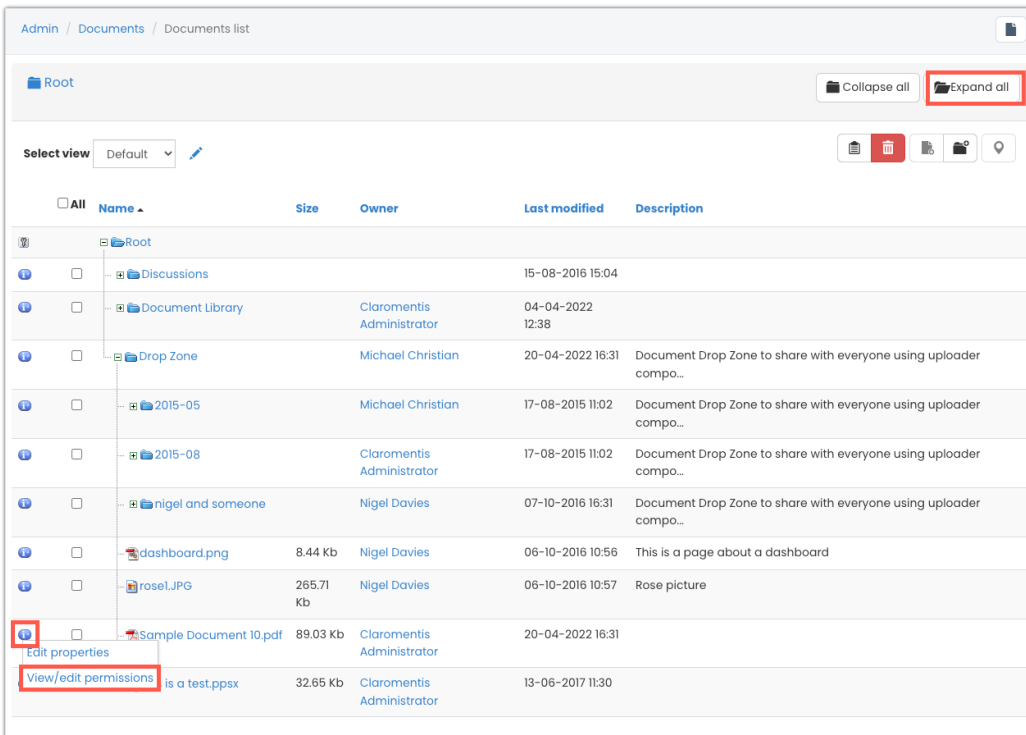
Click 'apply permissions' to save, user access will update in line with this.

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.



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

Start typing to add...

- Public
 - All registered
 - Owner
 - Role: Administrators

View

- Create Draft
- Edit & Approve
- Move/delete
- Edit Metadata
- Edit permissions

[View effective permissions...](#)

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

Select view: Default

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