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 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
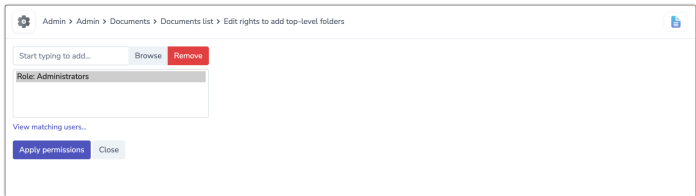
Permission to make changes at the root

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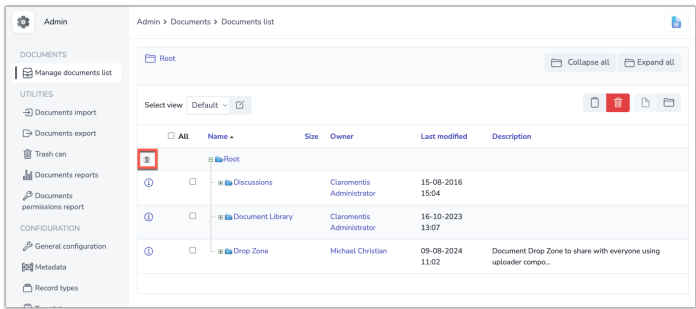
The icon highlighted above is where permissions to edit the root level can be carried out.

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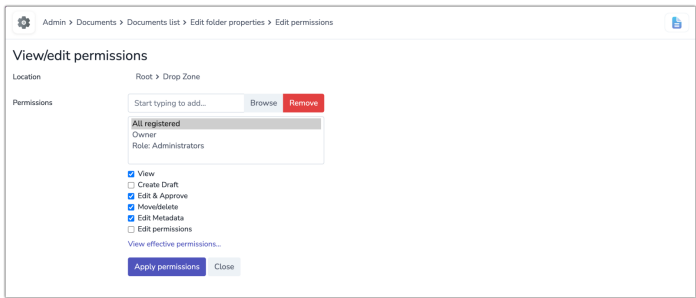
From the 'Manage Documents List' area, navigate to the folder or subfolder you wish to make changes to.

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

Select 'view/edit permissions'.
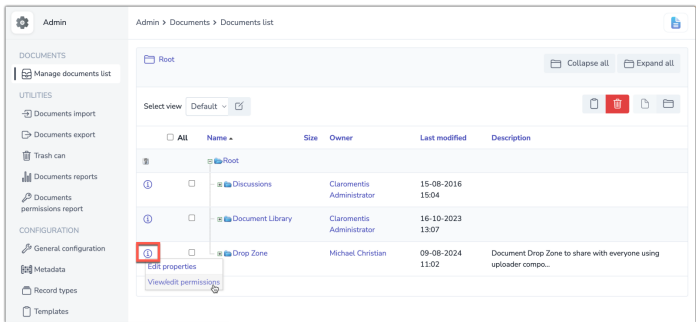
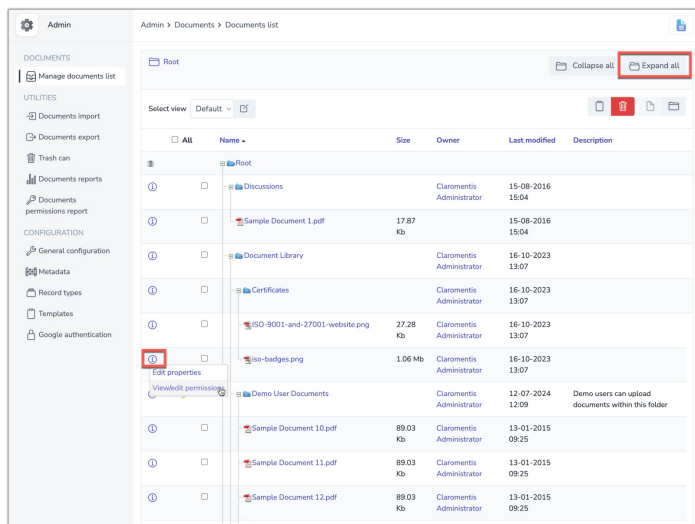On the next screen permissions for that folder can be edited.

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

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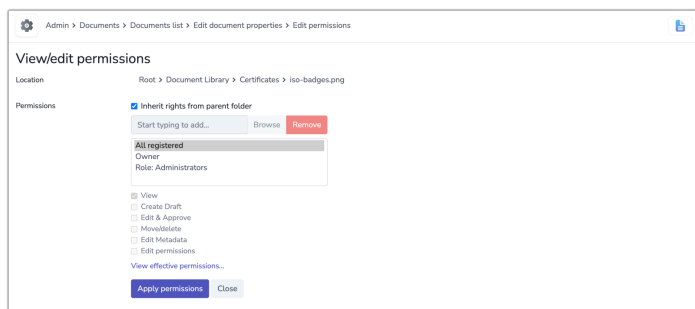
Click 'apply permissions' to save, user access will update in line with this.

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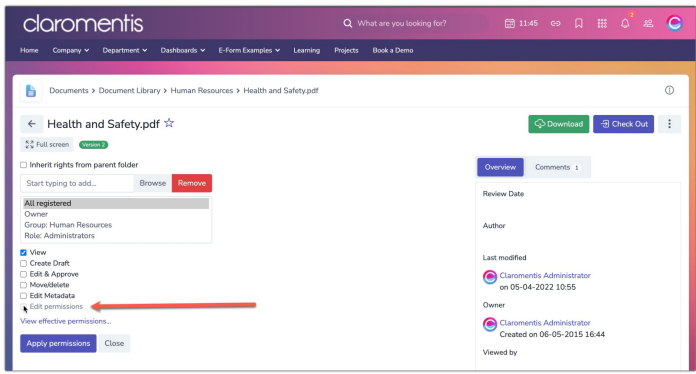
'Edit Permissions' permission

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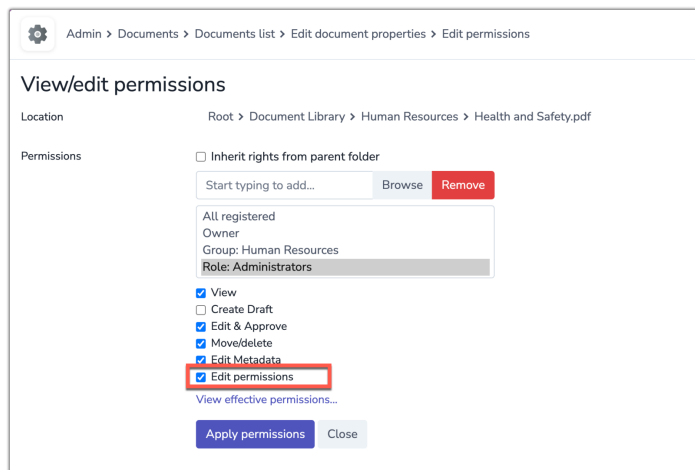
As this is quite a big responsibility, and because it allows user access to be changed, it can only be applied to users by an administrator on the admin side.

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.

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.

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