

PowerDMS[®]

Document Management **Simplified**

Understanding Folder Security

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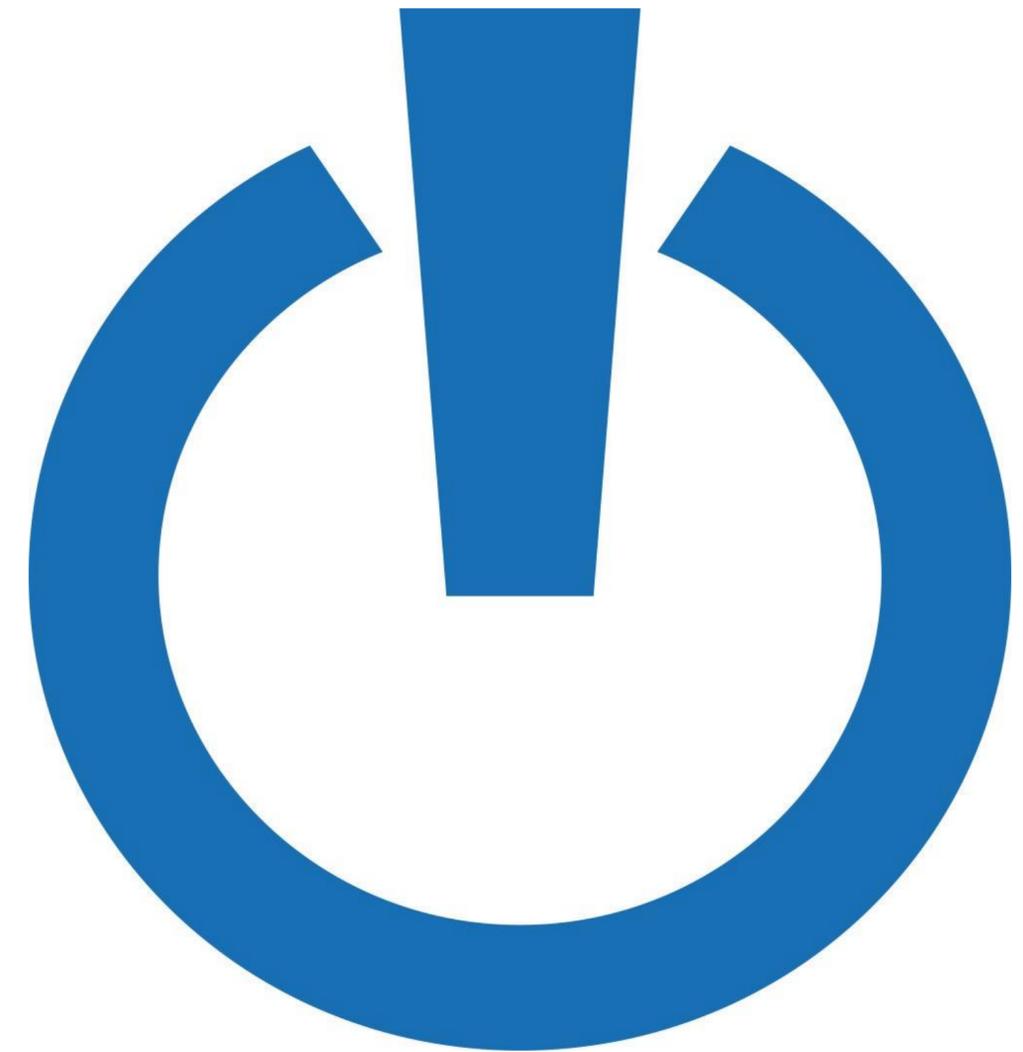
What you should know about this session:

- ✓ It is being recorded, and you will receive a copy of the video via e-mail on Friday
- ✓ Ask questions! 😊

What you can expect from this session:

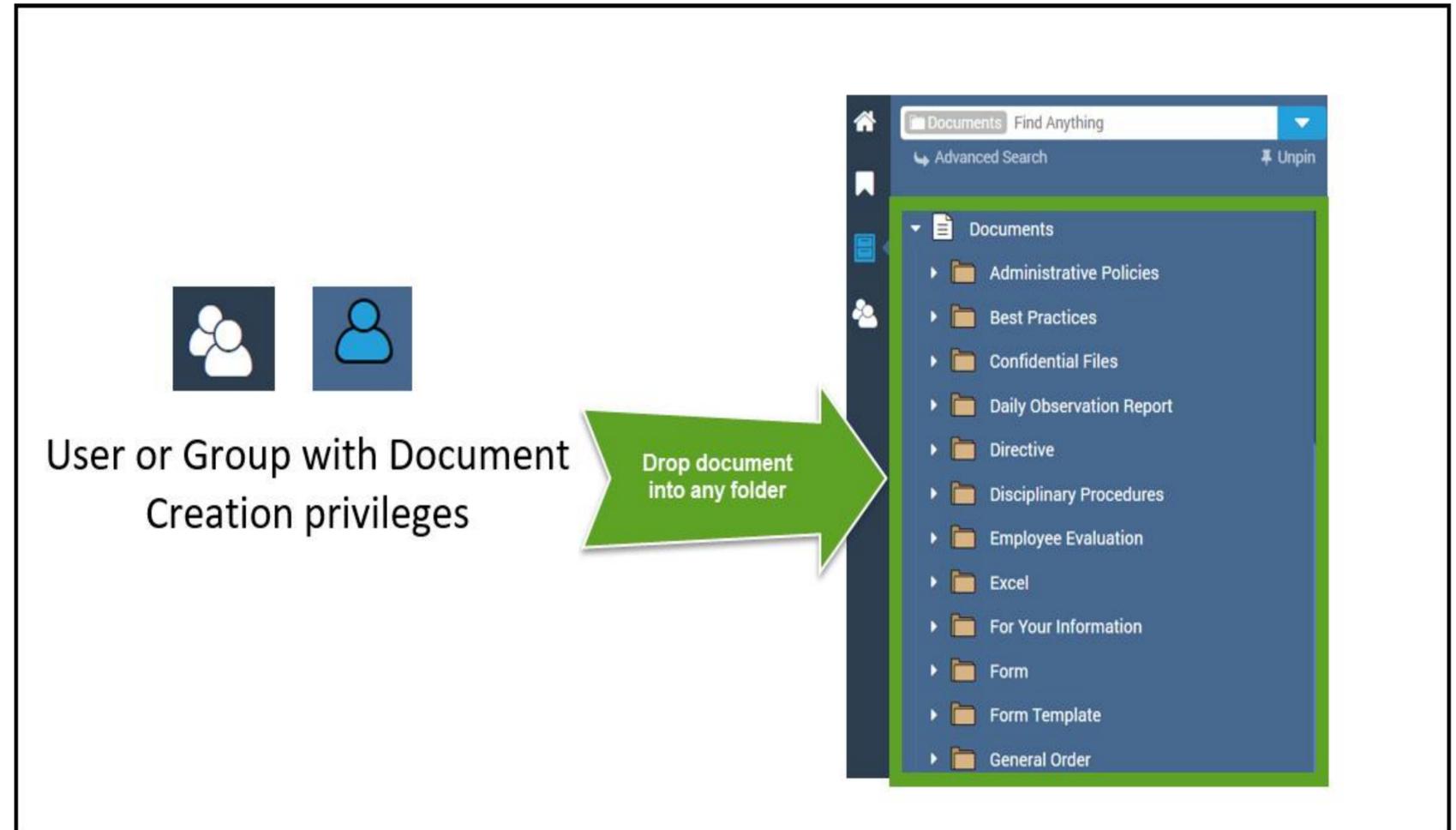
In this session we will review the new folders feature in PowerDMS and will specifically address:

- The folders feature
- The opt-in experience
- Creating folders
- Folder Security
- Sample scenarios



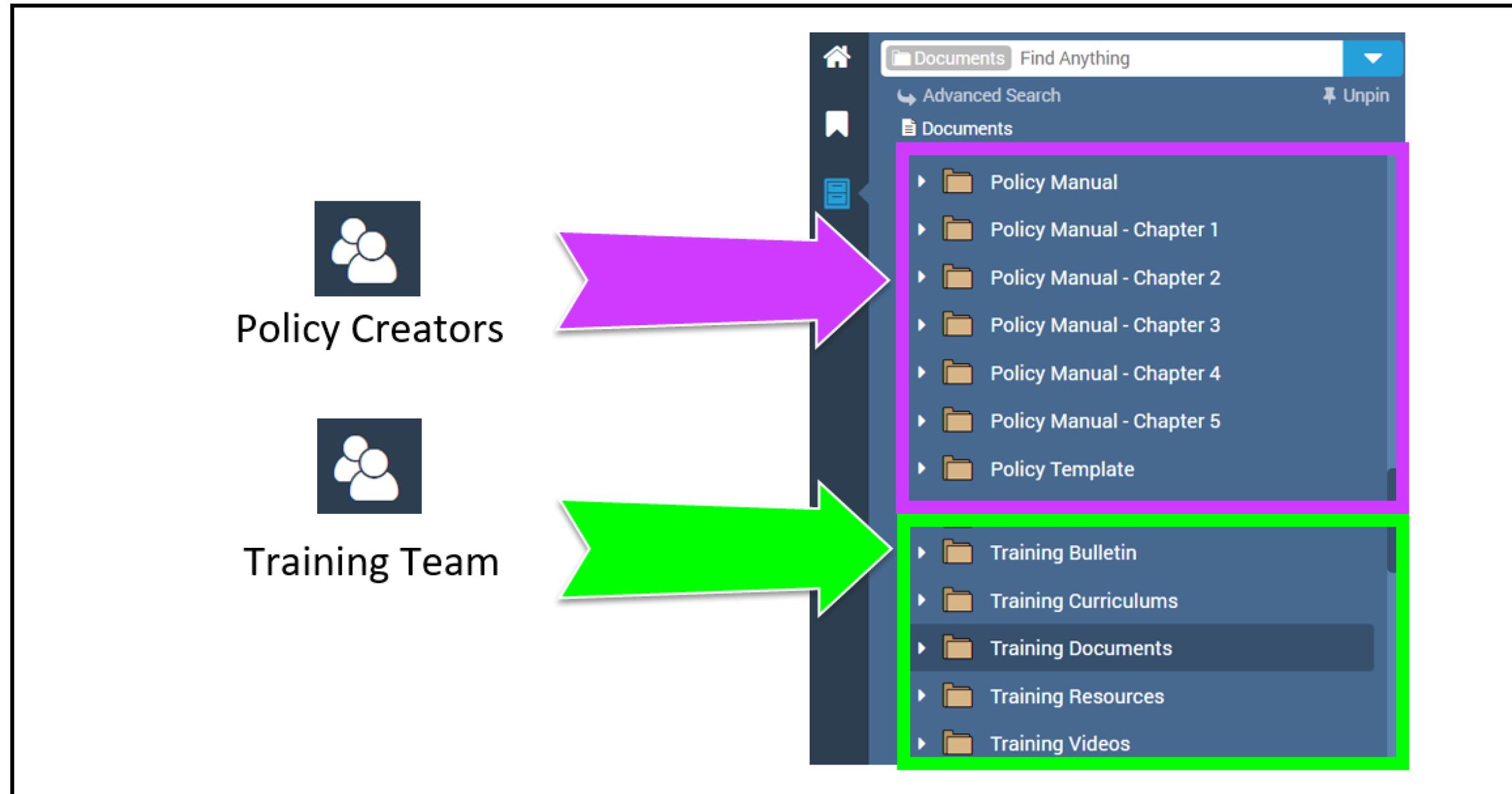
The Folders Feature:

Prior to the new folders feature, a user with "Document Create" privileges could drop a document into any folder



The Folders Feature:

With folders, users can interact specifically with the folder(s) that are relevant to their position within the organization



The Folders Feature:

You will also be given the ability to create “Nested Folders” or “Sub Folders”

Folders within folders

The screenshot displays the PowerDMS user interface. On the left, a navigation pane shows a folder hierarchy under 'Policy Manual'. A context menu is open over the 'Policy Manual' folder, offering options: 'Manage', 'New Folder' (highlighted), 'New Document', and 'Bookmark'. The main content area shows a 'Welcome to Our Agency's PowerDMS Site!' message, a 'To Do' list with tasks like 'Sign 2000 - Sexual Harassment Policy (Overdue) and 5 other documents', and a 'Dashboard' section with tabs for 'Users', 'Groups', 'Documents', 'Workflows', 'Training', and 'Assessments'. The user profile 'Caleb Smith' is visible at the bottom left, and a progress bar for '88 To Dos' is at the bottom right.

The Opt-In experience:

Upon login to PowerDMS, you will see an option for ***New Features Available***; upon clicking the feature, you will be walked through the process of upgrading to folders.

The Opt-In experience:

Once updated, you can easily drag and drop folders into other folders to make “Sub-Folders” or “Nested Folders”

The Opt-In experience:

Once updated, all users with document creation privileges will only have privileges to the “Root” Documents folder.

Setting Folder Privileges:

One of the most important steps to this process is to ensure that you give the appropriate groups “Edit” rights to the appropriate folders.

It may be appropriate to give them “Edit” and “Cascading” if they need access to the sub-folders as well.

Setting Folder Privileges:

To view “Who” in the organization has document creation rights, follow these steps:

- Hover over the **Documents** folder and click on the three dots
- Select **Manage**
- Select **Security**

Setting Folder Privileges:

To view “Who” in the organization has document creation rights, follow these steps:

- Hover over the desired folder and click on the three dots
- Select **Manage**
- Select **Security**
- Add the appropriate group(s) that need to add documents to this folder by giving them **Edit** to the folder

Setting Folder Privileges:

Once you have added privileges to the appropriate folders, it is important to REMOVE edit privileges from the documents folder:

- Hover over the Documents folder and click on the three dots
- Select **Manage**
- Select **Security**
- **Remove all privileges** for each group by unchecking all privileges.

Setting Folder Privileges:

What's with cascading?

Cascading means that the permission you're giving applies to anything inside of the folder.

If I give Edit cascading, not only can I edit my items, I can also edit any other items in the folder.

Scenarios

Scenario #1:

Sally and Trudy belong to the Training Specialists group. Create a folder called "Training Documents". Assign the following privileges:

- The Training Specialists need to be able to add documents to the "Training Documents" folder
- The Training Specialists need to be able to see each other's documents within that folder, but not edit them.

Scenario #1 - Solution:

Sally and Trudy belong to the *Training Specialists* group. Create a folder called "Training Documents". Assign the following privileges:

- Give the Training Specialists **Edit** rights over the Training Documents folder
- Give the Training Specialists given the **View Cascading** over the Training Documents folder.

Scenario #2:

The Training Department has a new division- Instructional Design.

Create a group called "Instructional Design Team", and create a folder called "Instructional Design Materials" that is a subfolder of the "Training Documents" folder.

Grant the Instructional Design Team group privileges to add content to their folder, as well as run reports on all content in that folder

Scenario #2- Solution:

- Grant **admin privileges** to the Instructional Design Team.
- Give the Instructional Design Team **Edit** rights over the "Instructions Design Materials" folder
- Give them **Cascading Audit** over that folder.

Questions?

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Thank you for joining us for
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