DocMoto
Security & Permissions

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Introduction

This document is designed to guide you through the security & permissions and associated functions available within DocMoto.

Permissions

Permissions can be set against any DocMoto folder or file. All permissions are applied on a group basis. That is members of a group are given access to the folder or file. By default, permissions are inherited from the parent folder. When setting permissions, the options are as follows.

Fig. Permissions

Permission	Effect on Folder	Effect on File
No Access	Not displayed	Not displayed
Read Only	Include in parent's folder list	Include in parent's folder list, can download
Read & Write	Create sub folder, add file	Check-out, check-in, cancel check-out, download
Read, Write & Delete	Create sub folder, add file, delete self ('this' folder)	Check-out, check-in, cancel check-out, download, delete self ('this' file)
Administer	Full access plus the right to set permissions for other groups	Shares ownership

Groups

A "Group" is a collection of users. All security is applied at group level. A user can be a member of multiple groups and with regard to permissions the highest level of access will apply. For example, a user is a member of two groups, "Sales" and "Managers". A folder has permissions set such that the group "Sales" has no access and the group "Managers" has full access. A user who is a member of both groups will have full access to the folder.

DocMoto has two predefined top level groups, "users" and "administrators". All new groups will be nested within the group "users".

Users

A DocMoto user maps to a real person and the users credentials are used to log into the DocMoto Server.

A user's attributes are:

- **Login** – The user's login. A login is not case sensitive and should not contain:
  - **Whitespaces**
  - **Special characters (i.e. !@£$#)**
- **Real Name** – The name that is shown in DocMoto regarding a user action ie: who checked-in a file.
- **Email** – The user's SMTP email address. This is used by DocMoto's notification and subscription system. If left blank subscription will always be disabled for this user.
- **Allow Sharing** – Controls whether a user can create shares.

- **Inactive** – Sets the user inactive effectively removing them (as a user against the licence) but not deleting them. This is advantageous in that a full audit trail is kept for the user and is available for query. Generally, users should be set to inactive rather than deleting them.

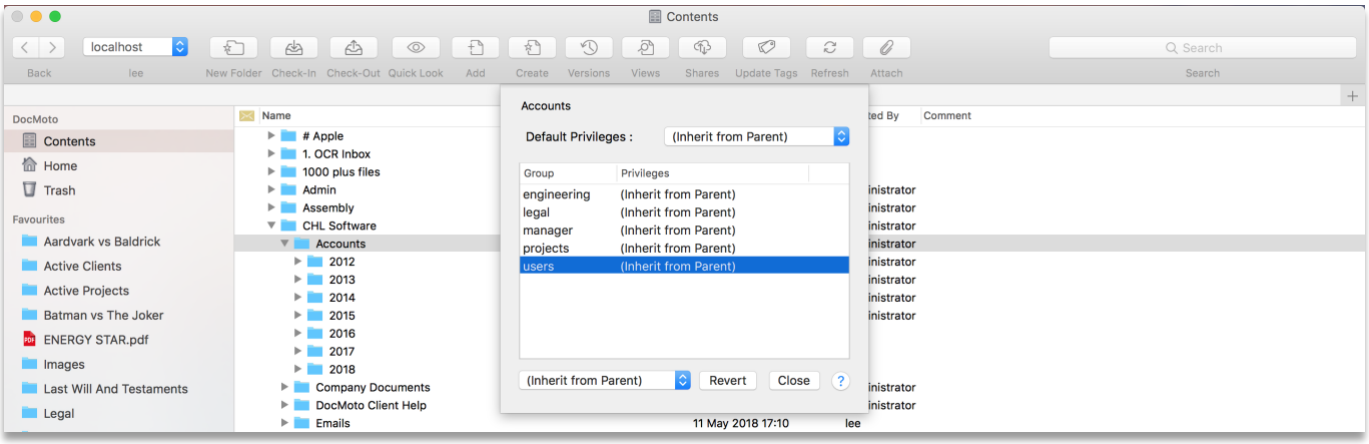
Setting Permissions

Permissions can be set against both folders and files. Permissions are group based. All members of the "administrators" group can set permissions as can any other groups given "administer" rights to the file or folder. The application of permissions is designed to be fast and simple particularly with large numbers of files, folders and user groups.

Setting Permissions – against an existing folder

1. Select the folder to set permissions against.
2. Select the **"Permissions"** option from either:
    a. The **"File"** menu.
    b. By right mouse clicking on the folder and selecting from the popup (or action) menu.
    c. The **"shift + cmd + p"** shortcut./
3. A Permissions dialog is presented as shown in Fig. Permissions dialog (folder).

Fig. Permissions dialog (folder)



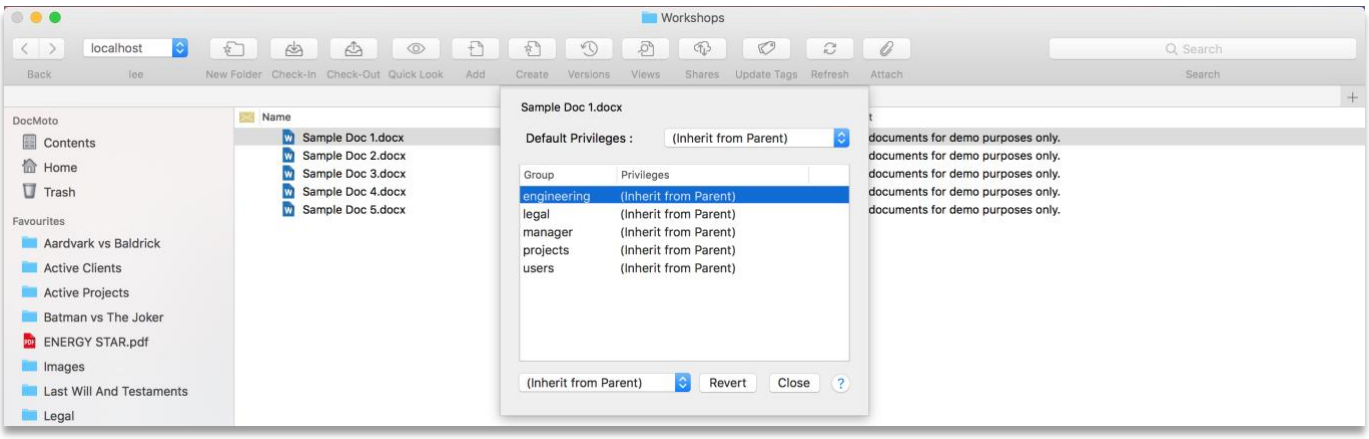
4. To apply a single set of permissions to the folder (**"Accounts" –** in this example) for all groups set the **"Default Privileges"** to the appropriate value. To modify the permissions for a single group, highlight the group and select the permissions required using the lower selection box.
5. Select **"Close"** to confirm changes.

Note: To reset the permissions to the default settings select **"Revert"**.

Setting Permissions – against an existing file

1. Select the file to set permissions against.
2. Select the **"Permissions"** option from either:
    a. The **"File"** menu.
    b. By right mouse clicking on the file and selecting from the popup (or action) menu.
    c. The **"shift + cmd + p"** shortcut.
3. A Permissions dialog is presented as shown in Fig. Permissions dialog (file).

Fig. Permissions dialog (file)



4. To apply a single set of permissions to the file (**"Sample Doc 1.docx" –** in this example) for all groups set the **"Default Privileges"** to the appropriate value. To modify the permissions for a single group, highlight the group and select the permissions required using the lower selection box.
5. Select **"Close"** to confirm changes.

Note: To reset the permissions to the default settings select **"Revert"**.

Setting Permissions – Template Manager

A template is a process that DocMoto can run when a folder is created. The purpose of a template is to automate tasks that are always undertaken when a folder is created. Templates are an excellent way to ensure that commonly created structures are always the same no matter who creates them.

For example, a template can be created for a project or legal case and will ensure that all projects or cases look the same with a common structure.

Templates can:

1. Create a sub folder structure within their parent folder.
2. Name sub folders based on criteria such as the parent folder's name or current date.
3. Import files from elsewhere within the DocMoto repository.

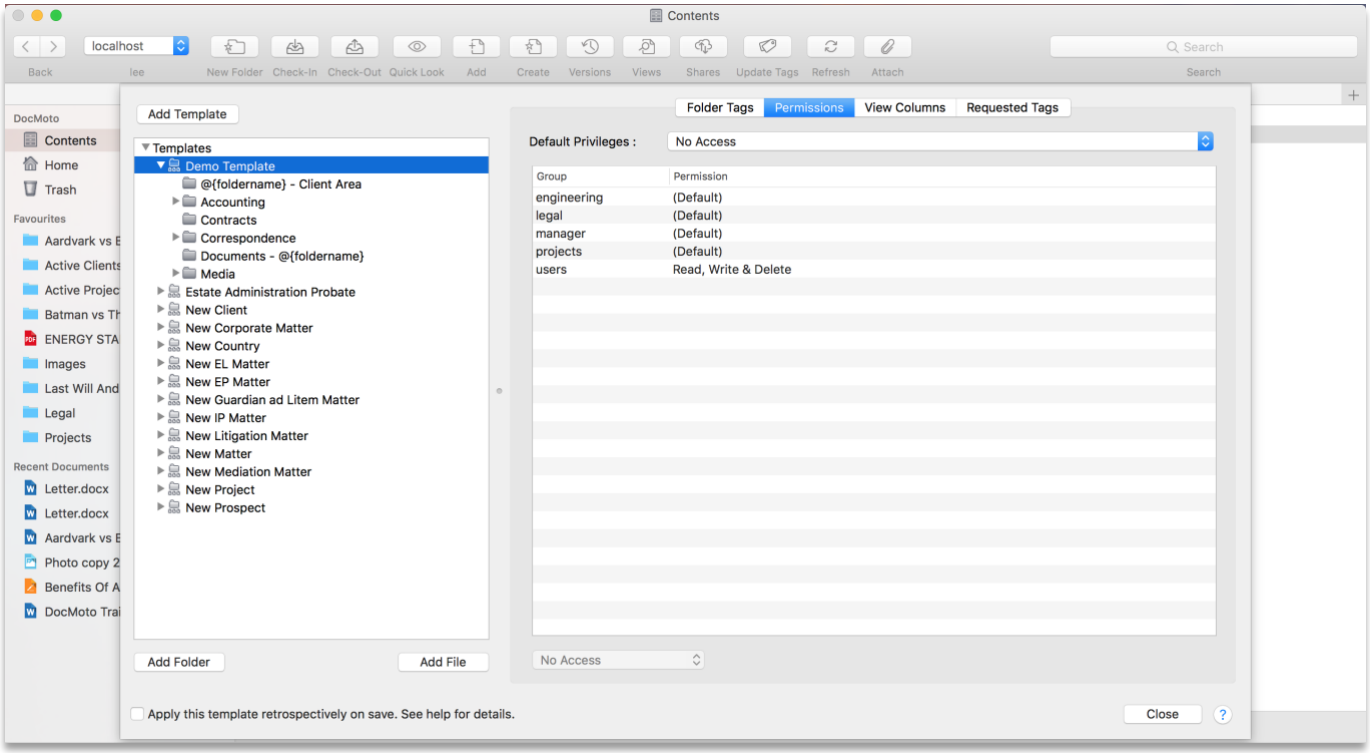
4. Set tags against folders or files.
5. Set permissions against folders or files.

By using DocMoto's ability to create folders from templates, administrators can retrospectively apply permissions changes in the folder template. DocMoto will apply the changes to all folders created via said template. Retrospective changes will be covered later in this document.

Setting Permissions – Template Manager (folders):

1. Select the **"Template Manager"** option from the **"Admin"** menu.
2. Select a folder within the folder template to set (or change) the permissions.
3. Select the **"Permissions"** tab as shown in Fig. Template Manager (folder) – Permissions Tab.

Fig. Template Manager (folder) – Permissions Tab



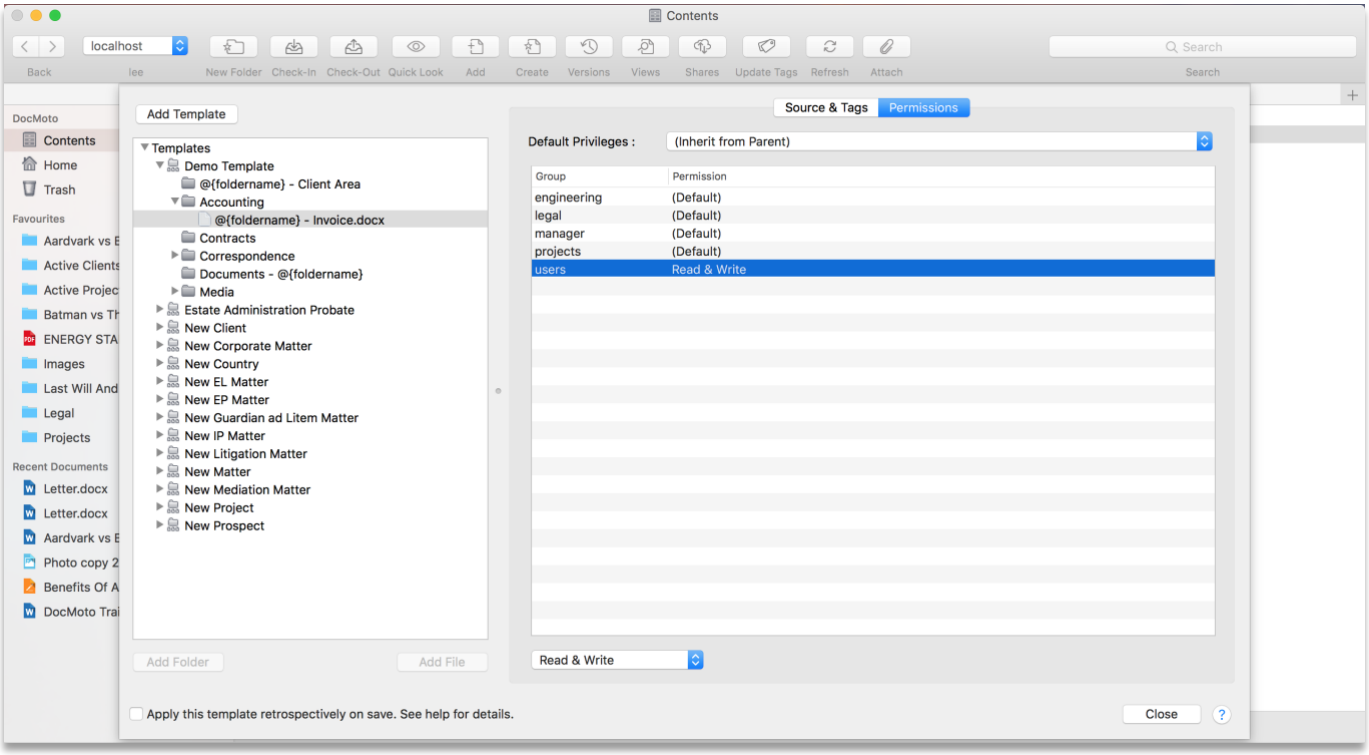
4. To apply a single set of permissions to the folder (**"Demo Template"** parent folder **–** in this example) for all groups set the **"Default Privileges"** to the appropriate value. To modify the permissions for a single group, highlight the group and select the permissions required using the lower selection box. In this example, the groups: **(a)** engineering **(b)** legal **(c)** manager **(d)** projects have **"No Access"** set whereas the group "users" have **"Read, Write & Delete"**.
5. Select **"Close"** to confirm changes.

Setting Permissions – Template Manager (files):

1. Select the **"Template Manager"** option from the **"Admin"** menu.
2. Select a file within the folder template to set (or change) the permissions.

3. Select the **"Permissions"** tab as shown in Fig. Template Manager (file) – Permissions Tab.

Fig. Template Manager (file) – Permissions Tab



4. To apply a single set of permissions to the file (**"Invoice.docx" –** in this example) for all groups set the **"Default Privileges"** to the appropriate value. To modify the permissions for a single group, highlight the group and select the permissions required using the lower selection box. In this example, the groups: **(a)** engineering **(b)** legal **(c)** manager **(d)** projects have **"No Access"** set whereas the group "users" have **"Read, Write"**.
5. Select **"Close"** to confirm changes.

Setting Permissions – Retrospectively

As the life-cycle of a DocMoto system progresses it can become necessary to update template definitions and re-apply them to folders. The DocMoto system has a set of tools to make this possible. To re-apply a modified template is in principle extremely easy. All that is required is to select a single tick box within the **"Template Manager"** and save the changes. For a more detailed listing of the rules for retrospective changes, click here.

The next section will include an example of how permissions can be changed retrospectively via the **"Template Manager"**. The example is based upon the demo folder template illustrated in Fig. Template Manager (folder) – Permissions Tab.

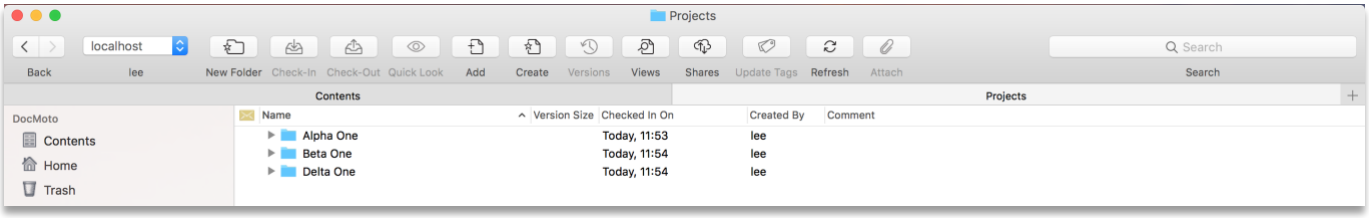
The following projects have been created by the folder template **"Demo Template"**:

1. Alpha One

2. Beta One
3. Delta One

As shown in Fig. Projects created by Demo Template.

Fig. Projects created by Demo Template.

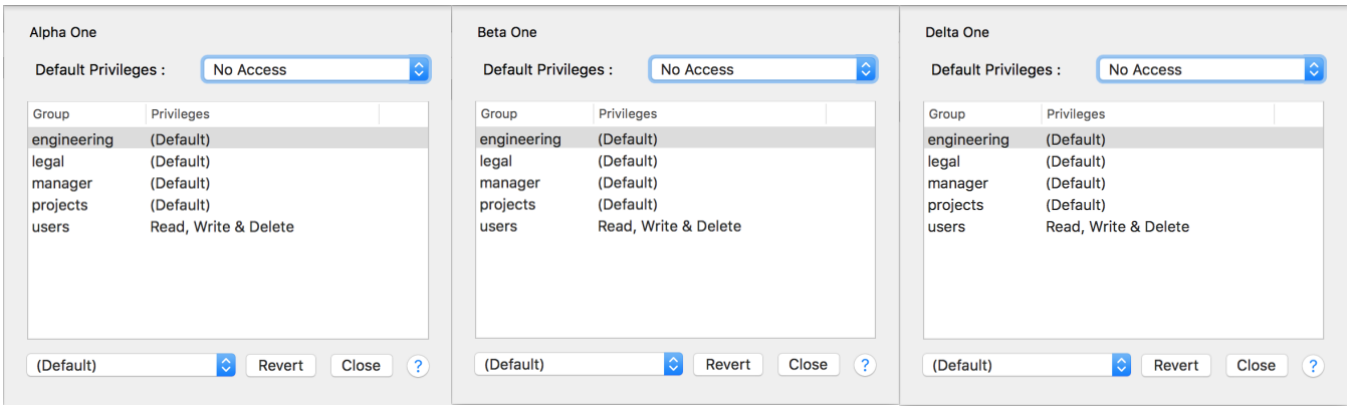


The permissions set against the parent folder (for each project) is:

- **engineering** – No Access (Default)
- **legal** – No Access (Default)
- **manager** – No Access (Default)
- **projects**– No Access (Default)
- **users** – Read, Write & Delete

As illustrated in Fig. Template Manager (folder) – Permissions Tab and Fig. Project parent folder permissions.

Fig. Projects parent folder permissions

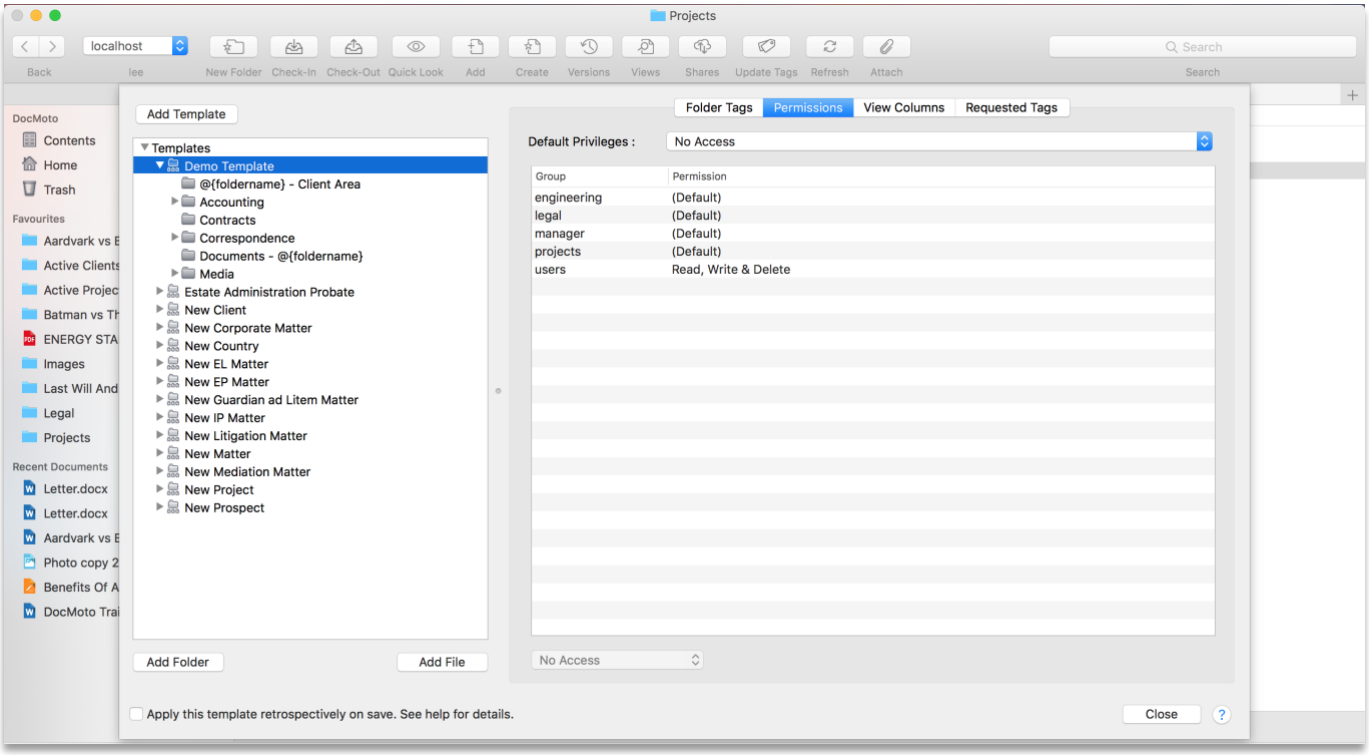


The next section will illustrate how to apply permission changes retrospectively to any project created via the **"Demo Template"**.

Template Manager – retro permissions change.

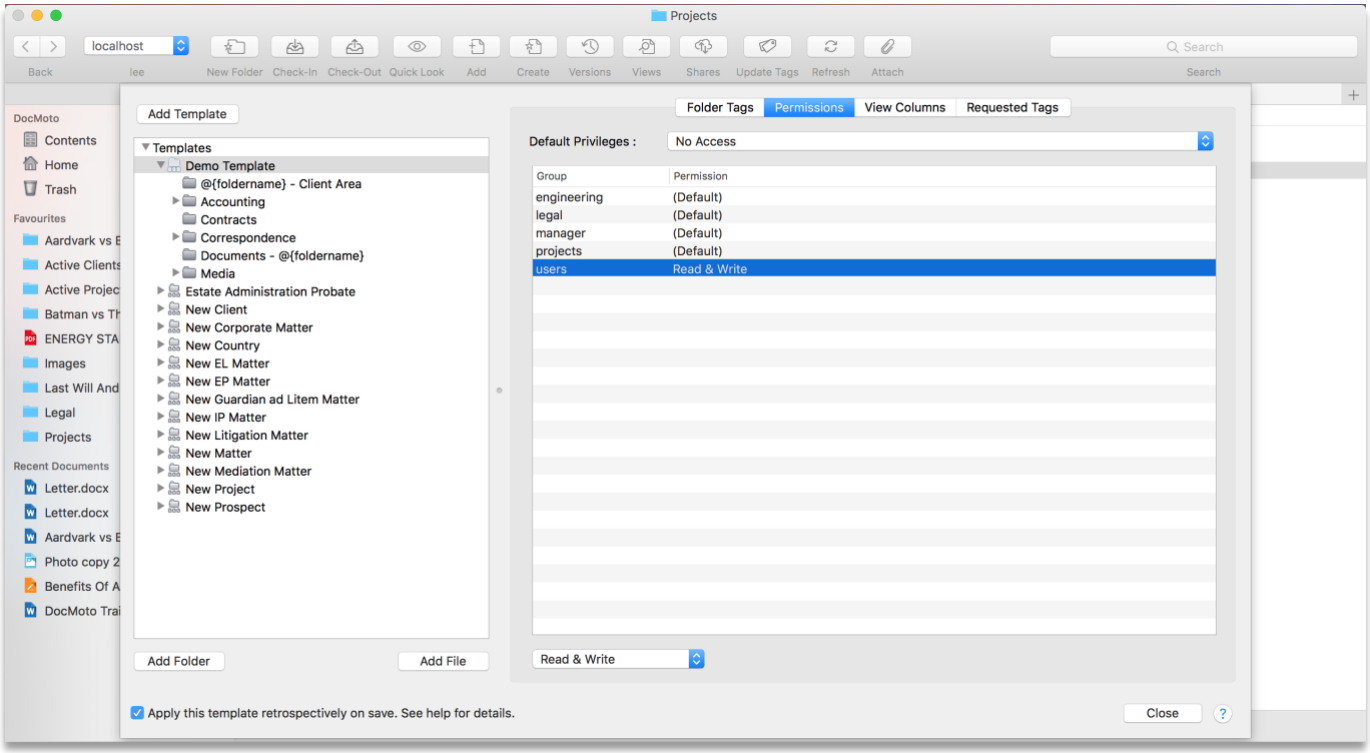
1. Select the **"Template Manager"** option from the **"Admin"** menu.
2. Select a folder within the folder template to set (or change) the permissions.
3. Select the **"Permissions"** tab as shown in Fig. Template Manager (retro permissions change) – Permissions Tab.

Fig. Template Manager (retro permissions change) Permissions Tab.



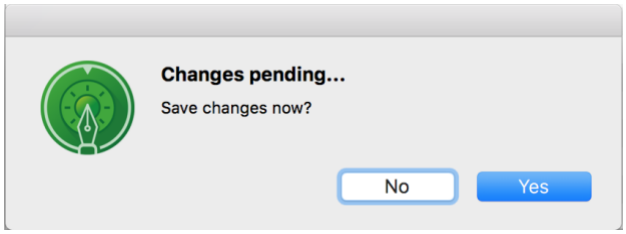
4. To apply a single set of permissions to the folder (**"Demo Template"** parent folder **–** in this example) for all groups set the **"Default Privileges"** to the appropriate value. To modify the permissions for a single group, highlight the group and select the permissions required using the lower selection box. In this example, the groups: **(a)** davidson **(b)** external **(c)** inactive have **"No Access"** set whereas the group **"users"** will be set to **"Read & Write"**. Essentially removing the delete permissions for the **"users"** group. As shown in Fig. Template Manager (retro permissions change) Users group.

Fig. Template Manager (retro permissions change) Users group.



5. Once the permissions change is set – select the tick box labelled **"Apply this template retrospectively on save."**.
6. Select **"Close"**. The user will be prompted to save the changes as shown in Fig. Template Manager – Changes Pending dialog.

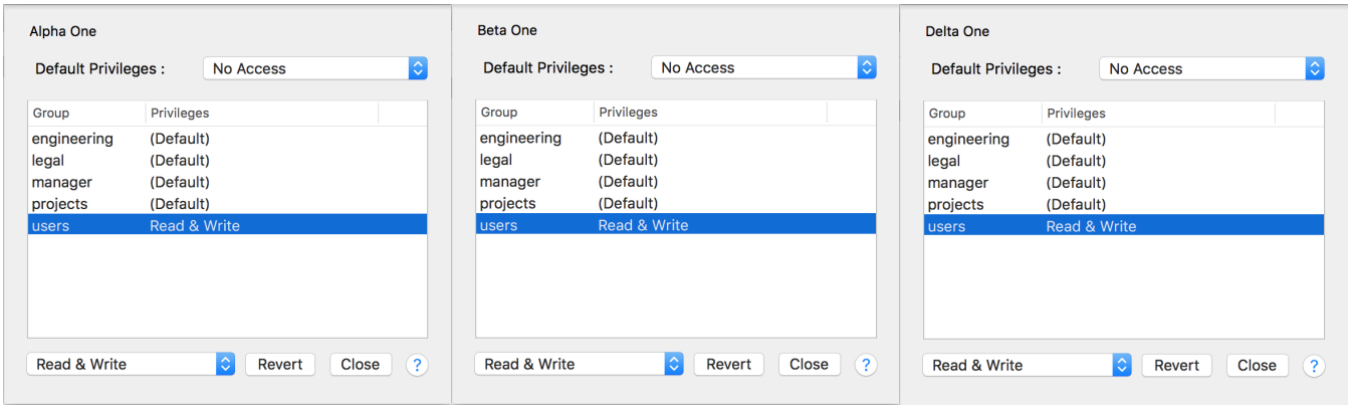
Fig. Template Manager – Changes Pending dialog.



7. Select **"Yes"** to confirm the changes.

Once the changes have been confirmed the **"Template Manager"** will retrospectively apply the changes to any folders which have been created by the **"Demo Template"** folder template. As illustrated in Fig. Projects parent folder - permissions retro change.

Fig. Projects parent folder - permissions retro change.



The permissions on the parent folder of each project (Alpha One, Beta One, Delta One) have been modified with the changes effected in [Template Manager (retro permissions change) Users group](#).

Applying Tags to multiple folder for re-application of templates.

The DocMoto system makes it possible to apply tags and their values to multiple folders. To achieve this highlight the folders you wish to modify, select the **"Edit Folder Properties"** option from the **"File"** menu and add the required tags with associated values.

The Template Name Tag:

DocMoto folder templates are important and extremely popular, whenever a template is applied to a parent folder a tag called **"Template Name"** is completed. As such the **"Template Name"** tag is an ideal way to identify the folders that have had templates applied.

Re-application of Templates:

The DocMoto system can re-apply templates to the repository and the re-application uses the **"Template Name"** tag to indicate which folders should be considered.

Combining the two:

The two concepts listed above can be combined to enable administrators to tag a folder with an appropriate **"Template Name"** and retrospectively apply that template to that folder.

The main benefit being that it is an ideal way to simply re-organise a repository that was not originally created using templates.

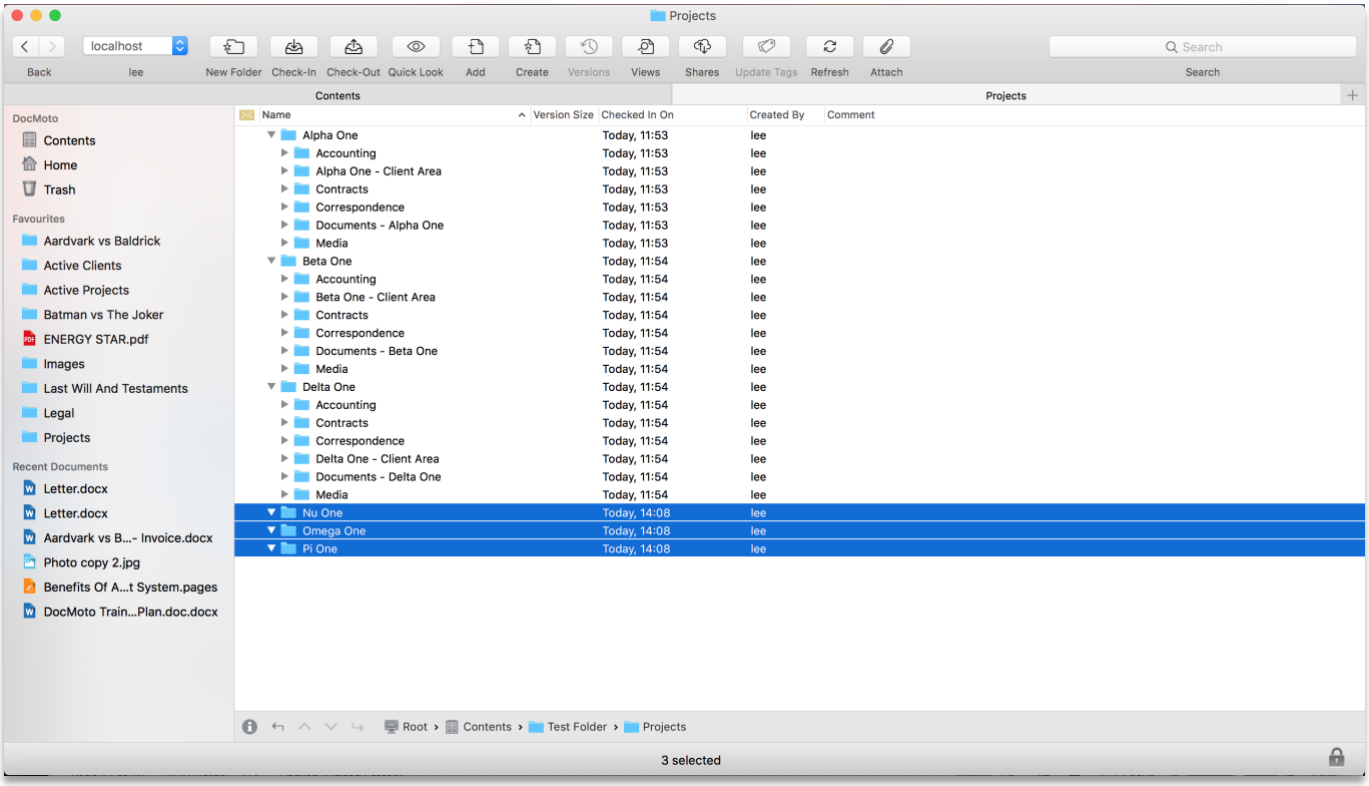
The next section includes an example of how administrators can utilise this functionality.

Apply Tags for Re-application of Templates – Example:

The following folders were created as standard folders:

1. Nu One (as shown in Fig. Projects created as standard folders)
2. Omega One
3. Pi One

Fig. Projects created as standard folders



Changing Tag Restrictions:

Administrators must change the tag restrictions on the tags:

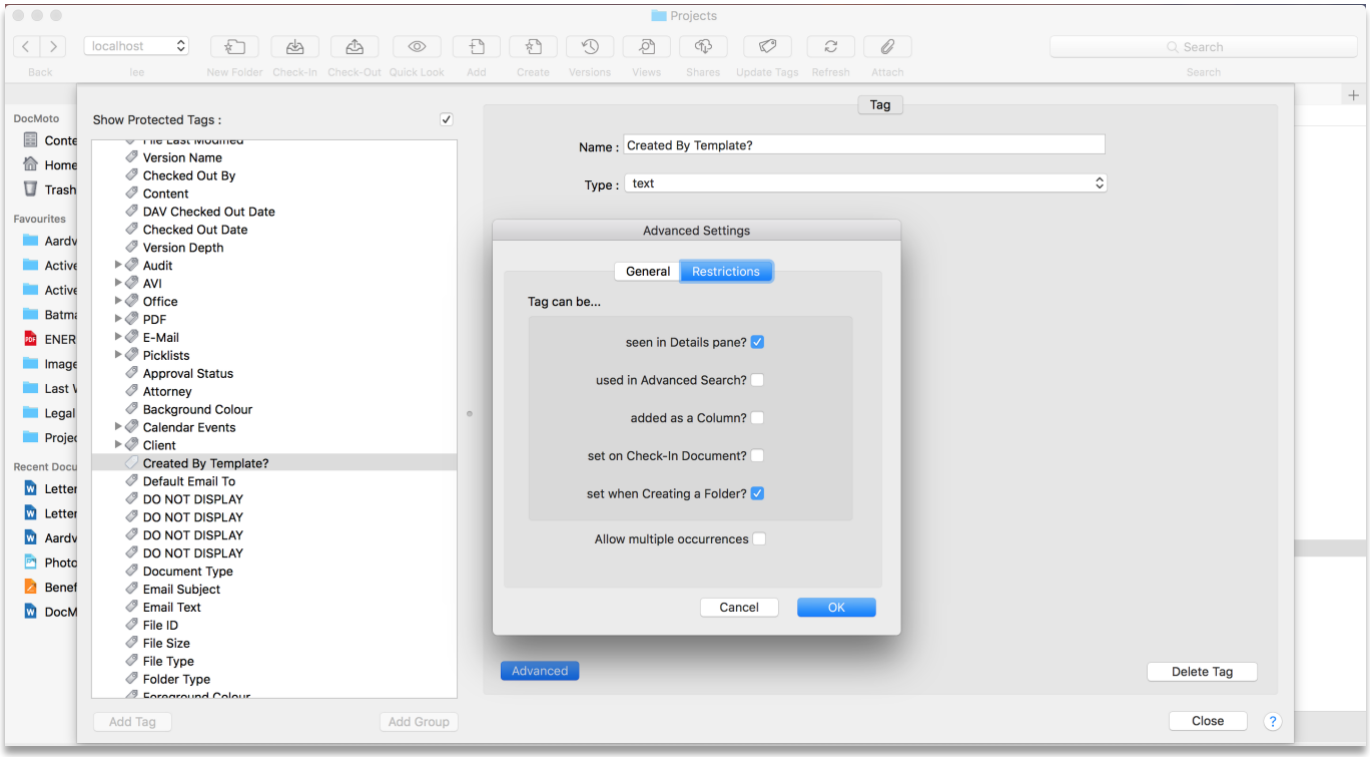
1. Template Name
2. Created By Template?

To achieve this:

1. Select **"Tag Manager"** from the **"Admin"** menu.
2. Select **"Show Protected Tags"** tick box (this will expose the system defined tags).
3. Navigate to the **"Created By Template?"** tag.
4. Select **"Advanced"** and an **"Advanced Settings"** dialog is presented.
5. Select **"Restrictions"** tab.
6. Select **"set when Creating a Folder?"** check box. As shown in Fig. Advanced Settings – Restrictions tab.

7. Repeat steps **3** to **6** for the tag **"Template Name"**.

Fig. Advanced Settings – Restrictions tab.



8. Select **"OK"** to confirm restrictions change.
9. Select **"Close"** (**"Tag Manager**).

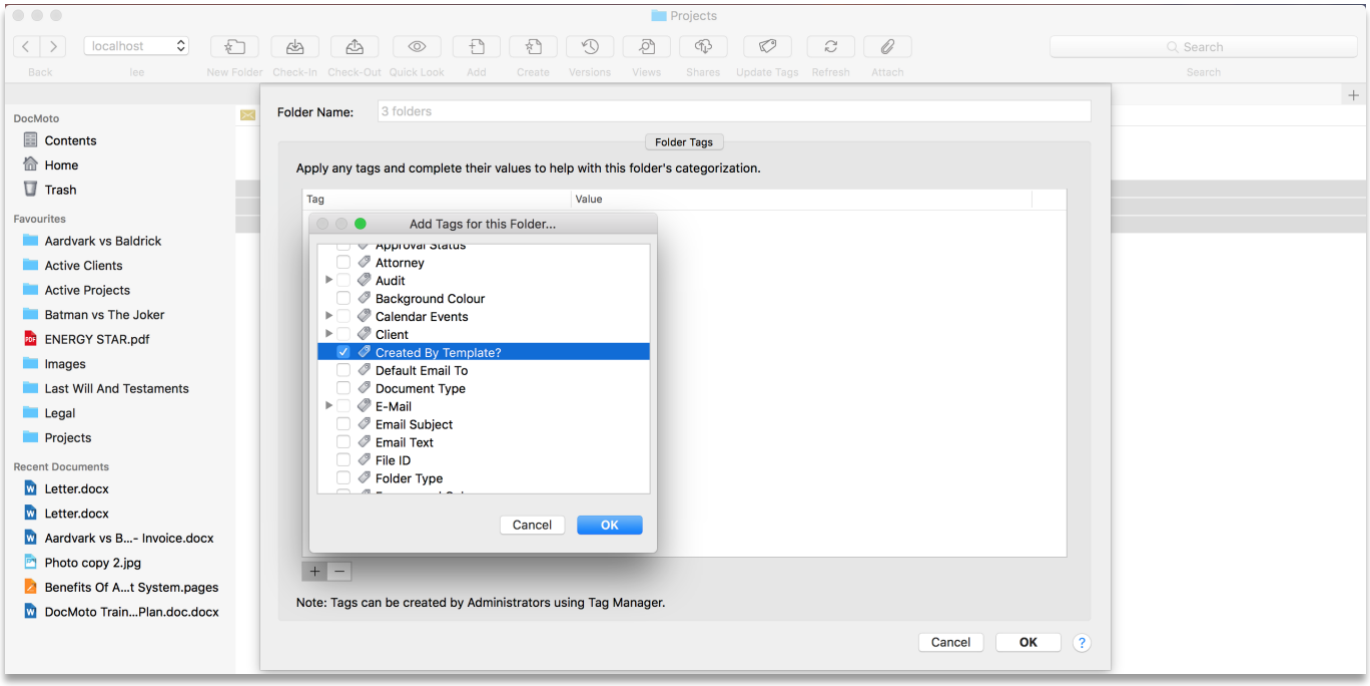
The administrator will be prompted to save the changes. Select **"Yes"** to confirm the changes.

Applying Tags to multiple folders:

Administrators can set the **"Created By Template?"** & **"Template Name"** tags to folders within the system.

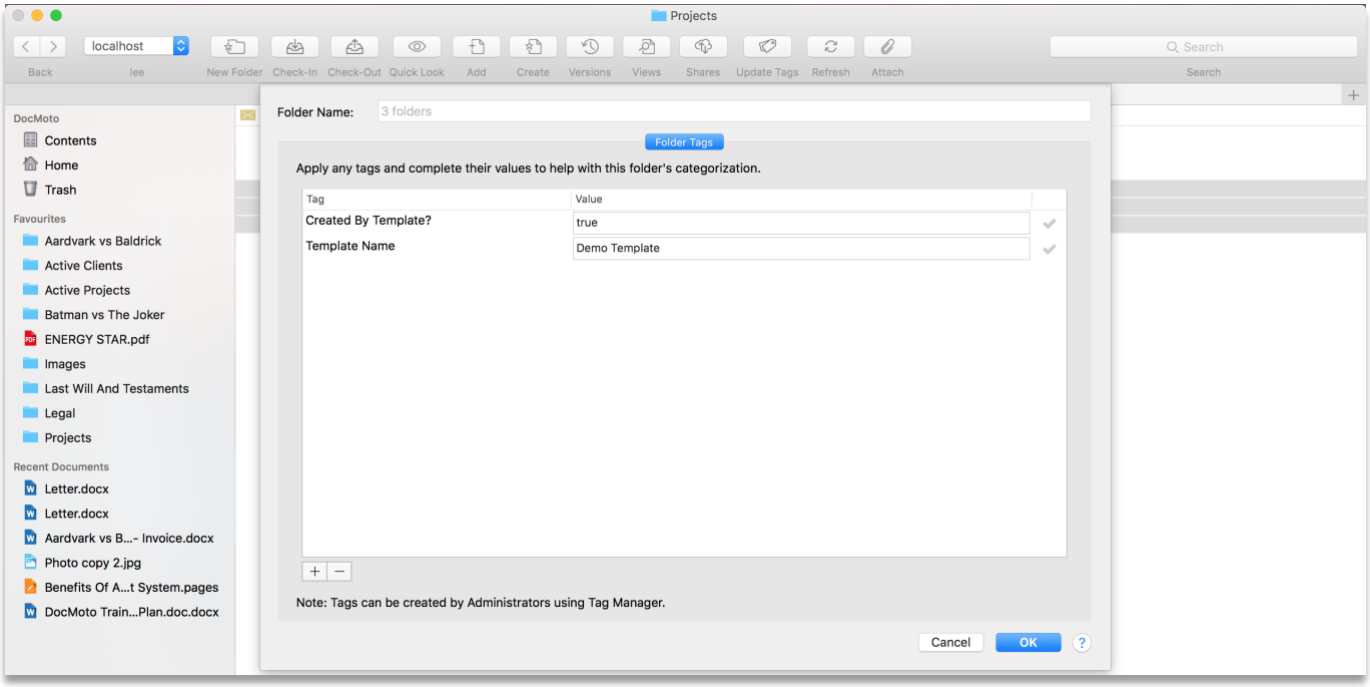
1. Select the folders which require the tags **"Created By Template?"** & **"Template Name"** for re-application of a folder template.
2. Select **"Edit Folder Properties"** option from either:
   a. The **"File"** menu.
   b. By right mouse clicking on the folders and selecting from the popup (or action) menu.
   c. The **"shift + cmd + e"** shortcut.
3. A **"Folder Tags"** dialog is presented enabling the user to add (or remove) folder tags. Select the **"+"** button (bottom left hand corner of dialog) to add tags.
4. An **"Add Tags to this Folder"** dialog is presented enabling the user to select the tags to add as folder tags. Navigate and select **"Created By Template?"** & **"Template Name"** tags. As shown in Fig. Add Tags for this Folder.

Fig. Add Tags for this Folder.



5. Select **"OK"** (Add Tags for this folder – dialog) to add tags.
6. Enter the following as values against the **"Created By Template?"** & **"Template Name"** tags:
    a. Created By Template? = **true**
    b. Template Name = **<name_of_the_template>** (in this example = **Demo Template**) as shown in Fig. Adding values to the "Created By Template?" & "Folder Name" tags.

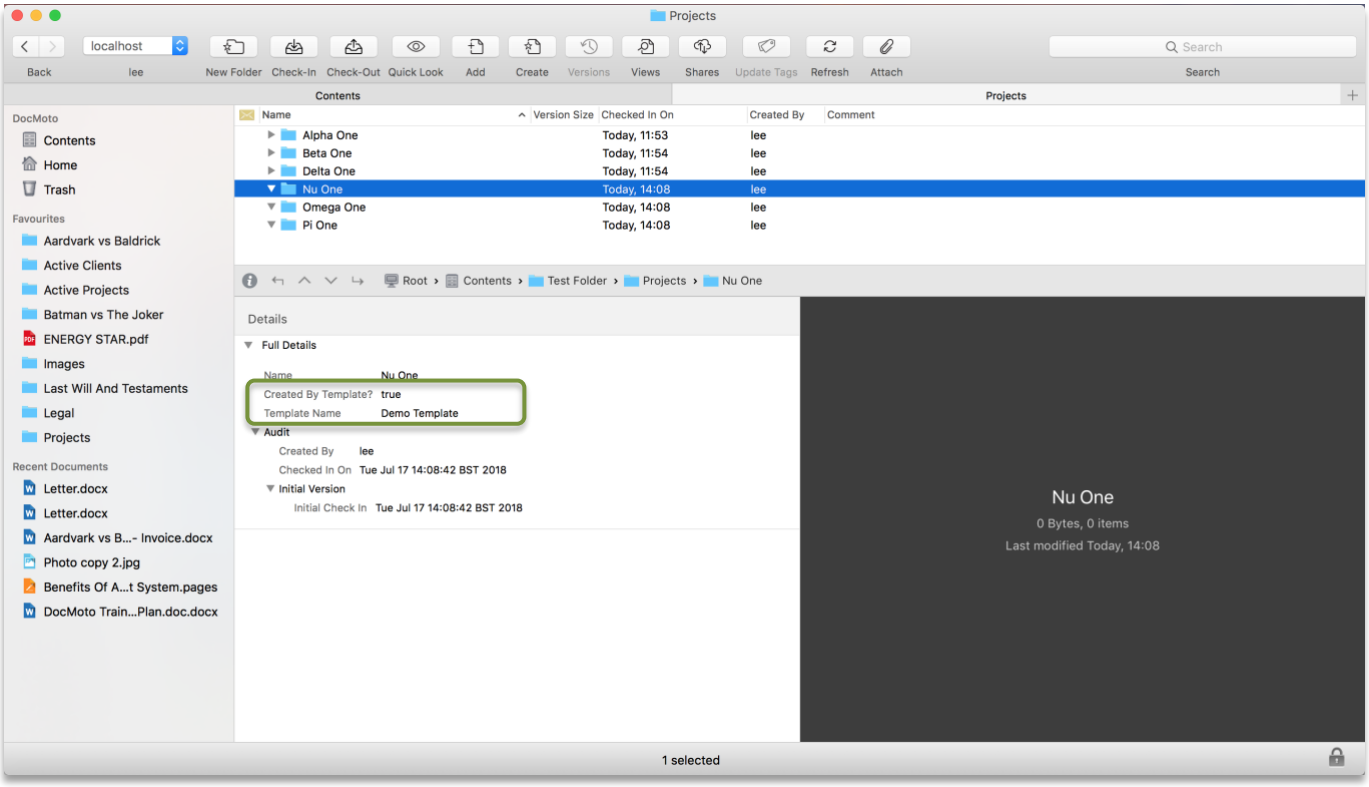
Fig. Adding values to the "Created By Template?" & "Folder Name" tags":



7. Select **"OK"** to apply the tags and values against the selected folders.

Fig. Folder Tags "Created By Template" & "Folder Name" and values applied to folders - illustrates.

Fig. Folder Tags "Created By Template" & "Folder Name" and values applied to folders:

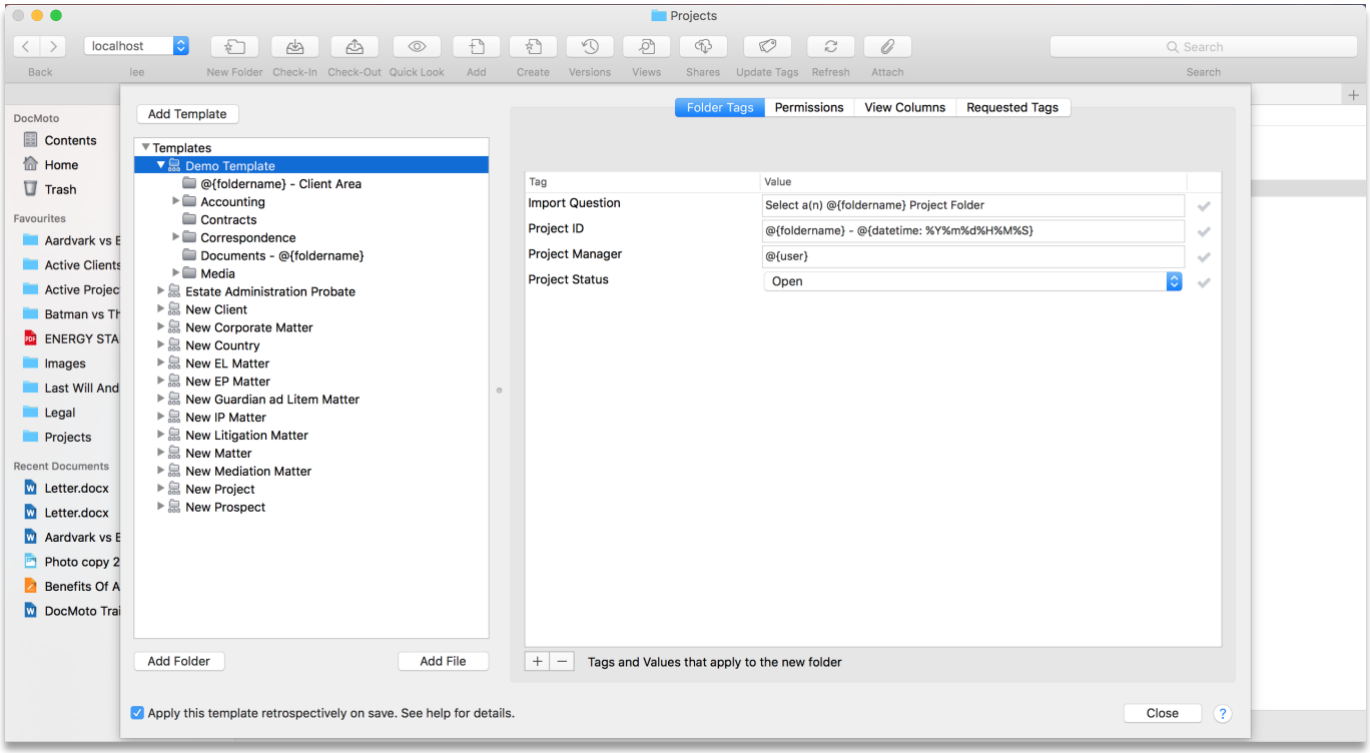


Re-Application of folder template – Example:

Administrators can now retrospectively apply the folder template **"Demo Template"** to the system.

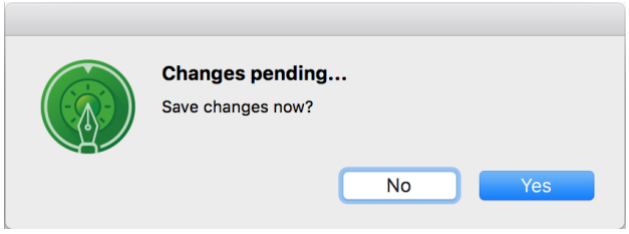
1. Select the **"Template Manger"** from the **"Admin"** menu.
2. Select the template to apply the retrospective changes.
3. Select the tick box labelled **"Apply this template retrospectively on save."**. As shown in Fig. Applying the "Demo Template" retrospectively.

Fig. Applying the "Demo Template" retrospectively:



4. Select **"Close"**.
5. The user will be prompted to save the changes as shown in Fig. Demo Template – Changes Pending dialog.

Fig. Demo Template – Changes Pending dialog:

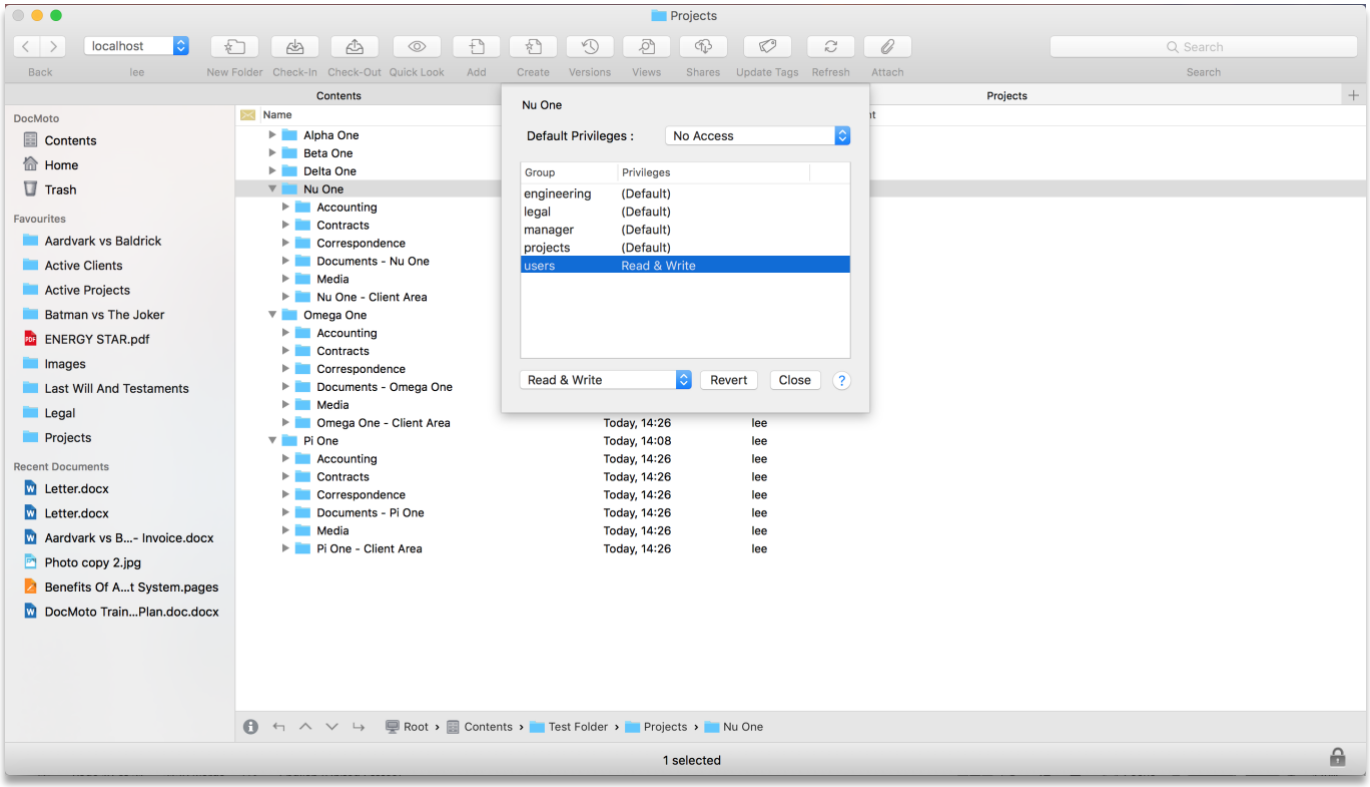


6. Select **"Yes"** to confirm the changes.

DocMoto will check for any folder which has been created by the folder template **"Demo Template"** and retrospectively apply the necessary changes. As the folders in this example have been marked as being created by the template **"Demo Template"** (use the two folder tags **"Created By Template?"** & **"Template Name"**) the folder structures will be changed to match. As shown in Fig. Retrospective change results – Demo Template.

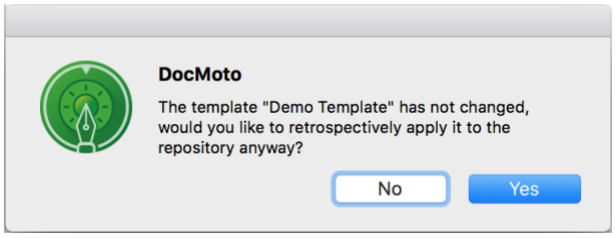
Note: If the administrator has not changed any of the folder templates properties (i.e. new folders or files, permissions, column views, document or folder tags, etc) then they will receive a message to reflect this point. As shown in Fig. Apply changes anyway dialog.

Fig. Retrospective change results – Demo Template:



The projects: **(1)** Nu One **(2)** Omega One & **(3)** Pi One have been retrospectively changed to match the folder template **"Demo Template"**.

Fig. Apply changes anyway dialog:



Summary:

The example illustrated above deals with converting a standard folder into a complex hierarchical folder with business rules applied (permissions, sub-folders, custom column views, folder & document tags). It is possible to create a folder template with just one folder with custom permissions and apply this template retrospectively to either standard or hierarchical folder(s). The retrospective rules ensure no sub-folders or business rules (folder and document tags) are removed only added.

Permissions Report:

DocMoto has a sophisticated built-in reports system. Designed specifically to provide essential management information, the reporting feature is another tool to help increase efficiency, improve customer service and drive down costs.

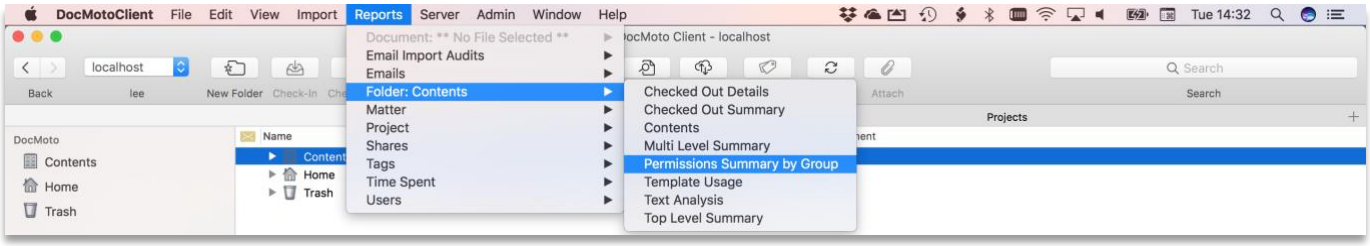
The next section will cover the permissions based report.

Running the Permissions Report:

To run the permissions report:

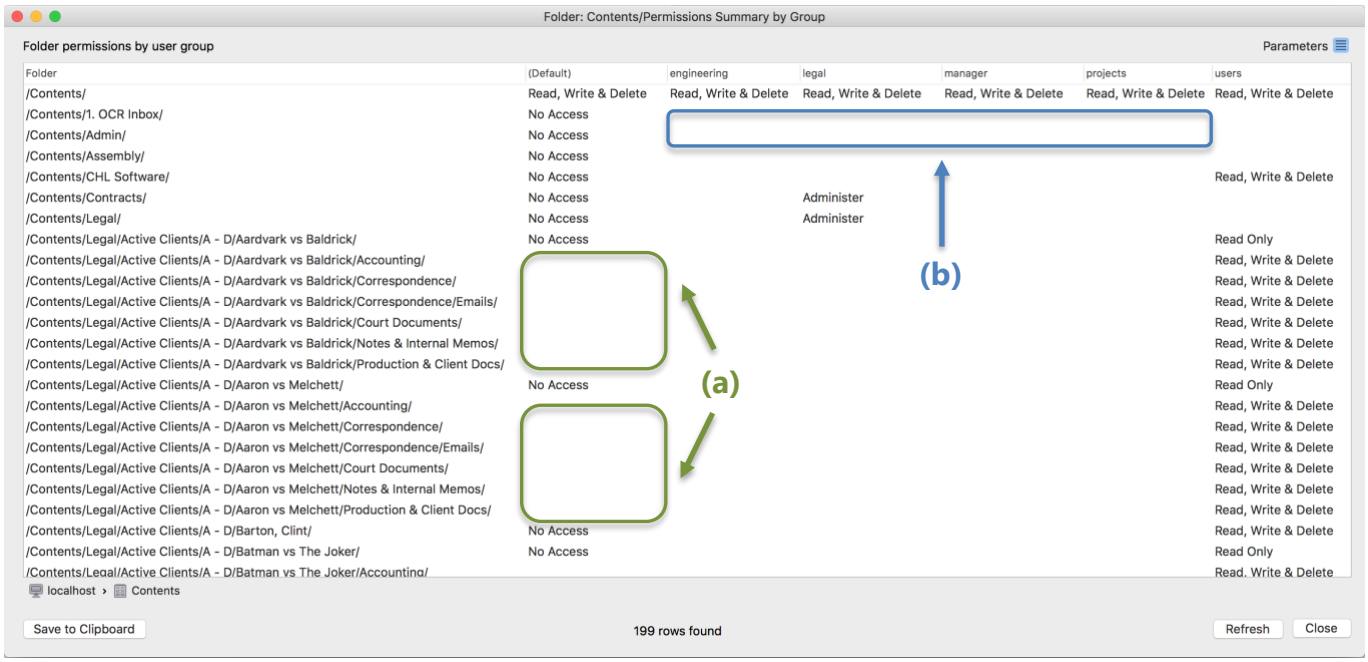
1. Select the **"Permissions Summary by Group"** menu item from the **"Reports/Folder: <name_of_folder>/"** menu. As shown in Fig. Permissions Report – Menu Item. **Note:** The **"<name_of_folder>"** listed above is the name of the folder where the report is run from, in this example the **"Contents"** level folder. This example gives the user a global permissions matrix.

Fig. Permissions Report – Menu Item:



2. A report will be created and the result set will be displayed to the user. As shown in Fig. Permissions Report – Result Set.

Fig. Permissions Report – Result Set:



Folder	(Default)	engineering	legal	manager	projects	users
/Contents/	Read, Write & Delete	Read, Write & Delete	Read, Write & Delete	Read, Write & Delete	Read, Write & Delete	Read, Write & Delete
/Contents/1. OCR Inbox/	No Access					
/Contents/Admin/	No Access					
/Contents/Assembly/	No Access					
/Contents/CHL Software/	No Access					Read, Write & Delete
/Contents/Contracts/	No Access		Administer			
/Contents/Legal/	No Access		Administer			
/Contents/Legal/Active Clients/A - D/Aardvark vs Baldrick/	No Access					Read Only
/Contents/Legal/Active Clients/A - D/Aardvark vs Baldrick/Accounting/						Read, Write & Delete
/Contents/Legal/Active Clients/A - D/Aardvark vs Baldrick/Correspondence/						Read, Write & Delete
/Contents/Legal/Active Clients/A - D/Aardvark vs Baldrick/Correspondence/Emails/						Read, Write & Delete
/Contents/Legal/Active Clients/A - D/Aardvark vs Baldrick/Court Documents/						Read, Write & Delete
/Contents/Legal/Active Clients/A - D/Aardvark vs Baldrick/Notes & Internal Memos/						Read, Write & Delete
/Contents/Legal/Active Clients/A - D/Aardvark vs Baldrick/Production & Client Docs/						Read, Write & Delete
/Contents/Legal/Active Clients/A - D/Aaron vs Melchett/	No Access					Read Only
/Contents/Legal/Active Clients/A - D/Aaron vs Melchett/Accounting/						Read, Write & Delete
/Contents/Legal/Active Clients/A - D/Aaron vs Melchett/Correspondence/						Read, Write & Delete
/Contents/Legal/Active Clients/A - D/Aaron vs Melchett/Correspondence/Emails/						Read, Write & Delete
/Contents/Legal/Active Clients/A - D/Aaron vs Melchett/Court Documents/						Read, Write & Delete
/Contents/Legal/Active Clients/A - D/Aaron vs Melchett/Notes & Internal Memos/						Read, Write & Delete
/Contents/Legal/Active Clients/A - D/Aaron vs Melchett/Production & Client Docs/						Read, Write & Delete
/Contents/Legal/Active Clients/A - D/Barton, Clint/	No Access					Read, Write & Delete
/Contents/Legal/Active Clients/A - D/Batman vs The Joker/	No Access					Read Only
/Contents/Legal/Active Clients/A - D/Batman vs The Joker/Accounting/						Read, Write & Delete

(a) Any whitespace within the **"Permissions"** report denotes the default permissions are set (i.e. Inherit from Parent – folders permission). Therefore, the folders:

Contents/Legal/Active Clients/A – D/Aardvark vs Baldrick/Accounting/
Contents/Legal/Active Clients/A – D/Aardvark vs Baldrick/Correspondence/
Contents/Legal/Active Clients/A – D/Aardvark vs Baldrick/Correspondence/Emails/
Contents/Legal/Active Clients/A – D/Aardvark vs Baldrick/Court Documents/
Contents/Legal/Active Clients/A – D/Aardvark vs Baldrick/Notes & Internal Memos/
Contents/Legal/Active Clients/A – D/Aardvark vs Baldrick/Production & Client Docs/

Has the **"No Access"** permission set for the groups:

- engineering
- legal
- manager
- projects

This is due to the parent folder **"Contents/Legal/Active Clients/A – D/Aardvark vs Baldrick/"** having the **"No Access"** permission set. Subsequently all child folders inherit the same permissions.

Whereas the **"users"** group has the **"Read, Write & Delete"** permission set against the folders listed above.

(b) Any whitespace within the **"Permissions"** report denotes the default permissions are set (i.e. Inherit from Parent – folders permissions). Therefore, the folder:

Contents/Admin/

Has the **"No Access"** permissions set for all groups (including the **"users"** group). Only administrators will be able to view this folder.

And the folder:

Contents/Legal/Active Clients/A – D/Aardvark vs Baldrick/

Has the **"No Access"** permissions set for the groups:

- engineering
- legal
- manager
- projects

Whereas the **"users"** group has the **"Read Only"** permissions set. This will ensure the child folder level cannot be manipulated (deleted, moved).