

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)

		Contents		
< > localhost 🗘	£ & & • f			Q Search
Back lee Nev	w Folder Check-In Check-Out Quick Look Add	Create Versions Views Shares Update Tags Refresh	Attach	Search
		Accounts		+
DocMoto	Name	hoodino	ted By Comment	
Contents	▶ 🔜 # Apple	Default Privileges : (Inherit from Parent)		
🗄 Home	<ul> <li>I. OCR Inbox</li> <li>1000 plus files</li> </ul>	Group Privileges		
😈 Trash	Admin	engineering (Inherit from Parent)	inistrator	
Favourites	Assembly     CHL Software	legal (Inherit from Parent)	inistrator	
Aardvark vs Baldrick	V Accounts	manager (Innerit from Parent)	inistrator	
Active Clients	▶ 2012	users (Inherit from Parent)	inistrator	
Active Projects	≥ 2013 ≥ 2014		inistrator	
Batman vs The Joker	Þ 📄 2015		inistrator	
ENERGY STAR.pdf	2016			
Images	<ul> <li>2017</li> <li>2018</li> </ul>			
Last Will And Testaments	Company Documents	(Inherit from Parent)   Revert Close ?	inistrator	
Legal	DocMoto Client Help		inistrator	
	Emails	11 May 2018 17:10 le	e	

- **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)

0 0 0						<b>V</b>	Vorkshops					
< > localhost	1		Ð	£	3	P	GB	Ø	C	0	Q, Search	
Back lee	New Folder Check-In	Check-Out Quick Look	Add	Create \	Versions	Views	Shares	Update Tags	Refresh	Attach	Search	
DocMoto Contents Contents Home Trash Favourites Aardvark vs Baldrick Active Clients Active Projects Batman vs The Joker ENERGY STAR.pdf Images	Name V Sa V Sa V Sa V Sa V Sa	mple Doc 1.docx mple Doc 2.docx mple Doc 3.docx mple Doc 4.docx mple Doc 5.docx		Sample D Default Group legal manager projects users	Doc 1.doc) Privilege ring	x Privileges (Inherit f (Inherit f (Inherit f (Inherit f	(Inherit fro irom Paren irom Paren irom Paren irom Paren irom Paren	t) t) t) t) t)		t documents for demo purposes only, documents for demo purposes only, documents for demo purposes only, documents for demo purposes only,		+
Last Will And Testaments				(Inherit	from Par	rent)	Rev	clos	ie ?			

- **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 <u>Fig. Template Manager (folder) Permissions</u> <u>Tab</u>.

### Fig. Template Manager (folder) – Permissions Tab

				Contents	
< > localho	ost 🗘 🖅 🖄		£ 3 4		Q Search
Back	lee New Folder Check-In Check-Out	Quick Look Add	Create Versions Views	Shares Update Tags Refresh Attach	Search
DocMoto	Add Template		Default Privileges	Folder Tags Permissions View Columns Requested Tags	+
Home Home Home Home Home Home Home Home	Vemplates	•	Group engineering legal manager projects users	Permission (Default) (Default) (Default) (Default) Read, Write & Delete	
	Add Folder	Add File	No Access	0	
	Apply this template retrospectively on sav	e. See help for details			Close ?

- 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

			Contents		,
< > localho	ost 📀 🚯 💩 💿 🗄	1 1 2		Q Search	
Back	lee New Folder Check-In Check-Out Quick Look Ad	d Create Versions View	s Shares Update Tags Refresh Attach	Search	
DocMoto	Add Template		Source & Tags Permissions		+
Contents	▼ Templates	Default Privileges :	(Inherit from Parent)	<b>`</b>	
🟠 Home	🔻 🔜 Demo Template	Group	Permission		
🔽 Trash	@{foldername} - Client Area	engineering	(Default)		
Favourites	@{foldername} - Invoice.docx	legal	(Default)		
Aardvark vs E	Contracts	manager	(Default)		
Active Clients	Correspondence	projects	(Default)		
Active Projec	Documents - @{toldername}	03013	Rood & Wile		
Batman vs Th	Estate Administration Probate				
	▶ 🔜 New Client				
	New Corporate Matter				
Images	New Country New EL Matter				
Last Will And	New EP Matter	•			
Legal	New Guardian ad Litem Matter				
Projects	New IP Matter     New Litigation Matter				
Recent Documents	► 🗟 New Matter				
Letter.docx	New Mediation Matter				
Letter.docx	New Project				
Mardvark vs E					
Photo copy 2					
Benefits Of A					
DocMoto Trai					
	Add Folder Add File	Read & Write	0		
	Apply this template retrospectively on save. See help for d	etails.		Close ?	

- 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 <u>here</u>.

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.

•••		Pr	rojects			
< > localhost	: * * * *	1 1 S 2	<b>(</b> ) <b>(</b> )		Q Search	
Back lee	New Folder Check-In Check-Out Quick Look	Add Create Versions Views	Shares Update Tags Refresh Attach		Search	
	Contents			Projects		+
DocMoto	Name	<ul> <li>Version Size Checked In On</li> </ul>	Created By Comment			
Contents	Alpha One	Today, 11:53	lee			
A Home	Beta One	Today, 11:54	lee			
Home	Delta One	Today, 11:54	lee			
Trash						

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

Alpha One Default Privileges : No Access	Beta One Default Privileges : No Access	Delta One Default Privileges : No Access				
GroupPrivilegesengineering(Default)legal(Default)manager(Default)projects(Default)usersRead, Write & Delete	GroupPrivilegesengineering(Default)legal(Default)manager(Default)projects(Default)usersRead, Write & Delete	Group     Privileges       engineering     (Default)       legal     (Default)       manager     (Default)       projects     (Default)       users     Read, Write & Delete				
(Default) Close ?	(Default)  Close ?	(Default) Close ?				

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 <u>Fig. Template Manager (retro permissions change) Permissions Tab</u>.

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

Projects													
< > localho	ost ᅌ 🔄 🖄	( ) ( )		1	୍ର	<b>P</b>	Ø	C	0		Q 5	Search	
Back	lee New Folder Check-In Check-Out	Quick Look Add		reate Versions	Views	Shares	Update Tags	Refresh	Attach			Search	
DocMoto Contents Content	Add Template  Templates  Add Templates  Correspondence Corrects Correspondence Corrects Correspondence Corrects Correspondence Corrects Correspondence Corrects Corre		0	Default Privileg Group engineering legal manager projects users		Folder T No Access Permission (Default) (Default) (Default) (Default) Read, Writ	ags Perm	issions	View Columns	Requested Tags			+
	Add Folder	Add File		No Access		٥							
	Apply this template retrospectively on sa	ve. See help for de	etails.								Close	?	

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.

						Projects						
< > localh	ost ᅌ 🚯 🛃		*	C	ð					Q Sei		
Back lee New Folder Check-In Check-Out Quick Look Add		iick Look Add	Create	Versions	Views	Shares	Update Tags	Refresh	Attach		Se	arch
DocMoto Contents Contents Home Trash Favourites Active Clients Active Project Batman vs Tr ENERGY STA Images Last Will And Legal Projects Recent Documents Letter.docx Letter.docx Aardvark vs E Photo copy 2 Benefits Of A DocMoto Trai	Add Template  Templates  Template		Defau Group legal mana proje	It Privilege p neering ager scts s	IS;	Folder 1 No Access Permission (Default) (Default) (Default) (Default) Read & Wr	ags Perm	issions	View Columns	Requested Tags		
	Add Folder	Add File	Rea	d & Write		0						
	Apply this template retrospectively on save.	See help for detai	ls.								Close	?

- 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 <u>Fig. Template</u> <u>Manager Changes Pending dialog</u>.

#### 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 <u>Fig. Projects parent folder - permissions retro change</u>.

#### Fig. Projects parent folder - permissions retro change.

Alpha One	Beta One	Delta One				
Default Privileges : No Access	Default Privileges : No Access	Default Privileges : No Access				
Group     Privileges       engineering     (Default)       legal     (Default)       manager     (Default)       projects     (Default)       users     Read & Write	Group     Privileges       engineering     (Default)       legal     (Default)       manager     (Default)       projects     (Default)       users     Read & Write	Group     Privileges       engineering     (Default)       legal     (Default)       manager     (Default)       projects     (Default)       users     Read & Write				
Read & Write   Revert Close ?	Read & Write   Revert Close ?	Read & Write    Revert Close ?				

The permissions on the parent folder of each project (Alpha One, Beta One, Delta One) have been modified with the changes effected in <u>Template Manager (retro permissions change) Users</u> 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.

			Projects	
$\langle \rangle$	localhost 🗘 😰 🖄		£ 9 A & C 2 /	Q Search
				Search
Back Back Back Back Back Back Back Back	Ite New Folder Checkel Checke Ite New Folder Checkel Checke Show Protected Tags : The Least Mounted Version Name Checked Out By Content OAV Checked Out Date Checked Out Date Checked Out Date Version Depth Ault OAVI Checked Out Date Version Depth Ault Ault Checked Out Date Version Depth Checked Out Date Version Depth Checked Sut Date Checked S		Create Versions Views Shares Update Tags Refresh Attach Tag Name: Created By Template? Type: text  Advanced Settings General Restrictions Tag can be Seen in Details pane? ? used in Advanced Search? added as a Column? set on Check-in Document? set when Creating a Folder? ? Allow multiple occurrences Cancel OK	Search +
	<ul> <li>File Type</li> <li>Folder Type</li> </ul>		Advanced	Delete Tag
	Add Tag	Add Group		Close

- 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.

	Projects	
< > localhost 🗘		Q Search
Back       iee       Neer Folder         Back       iee       Neer Folder         DocMoto       Image       Image         Images       Aardvark vs Baldrick       Active Clients         Active Clients       Active Projects         Batman vs The Joker       Images         Last Will And Testaments       Legal         Projects       Recent Documents         Letter.docx       Letter.docx         Photo copy 2.jpg       Benefits Of At System.pages	Image: Carcele Out Outlek Look Add	C. Search Search +
DocMoto TrainPlan.doc.docx	Note: lags can be created by Administrators using lag Manager. Cancel OK ?	

- 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":

		Projects	
< > localhost 🗘 😓			Q Search
Back lee New Folder	Check-In Check-Out Quick Look Add Create	Versions Views Shares Update Tags Refresh Attach	Search
			+
DocMoto	Folder Name: 3 folders		
Contents		Folder Tags	
1 Home	Apply any tags and complete their values to	help with this folder's categorization.	
Trash	Tag	Value	
Favourites	Created By Template?	true	×
Aardvark vs Baldrick	Template Name	Demo Template	¥
Active Clients			
Active Projects			
Batman vs The Joker			
ENERGY STAR.pdf			
Images			
Last Will And Testaments			
Legal			
Projects			
Recent Documents			
Letter.docx			
Letter.docx			
Aardvark vs B Invoice.docx			
Photo copy 2.jpg	+ -		
Benefits Of At System.pages			
DocMoto TrainPlan.doc.docx	Note: Tags can be created by Administrators	s using Tag Manager.	
		Cancel	

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:

Projects							
< > localh	ost 🗘 🚯 🖾 💿 🕆					Q Search	
Back	lee New Folder Check-In Check-Out Quick Look Add		Create Versions Views Shares U	odate Tags Refresh Attach	Search		
DocMote Contents Home Trash Favourites Aardvark vs E Active Clients Active Projec Batman vs Tr ENERGY STA Images Last Will And Legal Projects Recent Documents Letter.docx Letter.docx Aardvark vs E Photo copy 2 Benefits Of A DocMoto Trai	Add Template   Templates    Complete    Contracts  Cont	•	Tag Import Question Project ID Project Manager Project Status	Permissions     View Columns     Requested Tags       Value     Select a(n) @(foldername) Project Folder       @(foldername) - @(datetime: %Y%m%d%H%M%S)       @(user)       Open	· · · · · · · · · · · · · · · · · · ·		
	Add Folder Add File		+ - Tags and Values that apply	to the new folder			
	Apply this template retrospectively on save. See help for det	tails.			Close ?		

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

#### 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:

 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:

• • •	Document: ** No File Selected **	IocMoto Client - localhost		
< > localhost 📀 🐑 🔬	Email Import Audits Emails	2 10 0 0	0	Q Search
Back lee New Folder Check-In Che	Folder: Contents	Checked Out Details	Attach	Search
DocMoto Name	Matter Project Shares	<ul> <li>Checked Out Summary</li> <li>Contents</li> <li>Multi Level Summary</li> </ul>	Projects nent	+
Contents	Tags	Permissions Summary by Group		
Home ► Trash	Time Spent Users	Template Usage     Text Analysis     Top Level Summary		

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

### Fig. Permissions Report – Result Set:

	Folder: Contents/Per	missions Summary by (	Group			
Folder permissions by user group						Parameters 🧮
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					J
/Contents/Assembly/	No Access					·
/Contents/CHL Software/	No Access			1		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/		<b>\</b>		L.)		Read, Write & Delete
/Contents/Legal/Active Clients/A - D/Aardvark vs Baldrick/Correspondence/			(	D)		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/	$\square$					Read, Write & Delete
/Contents/Legal/Active Clients/A - D/Aaron vs Melchett/	No Access	(a)				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
Iocalhost >  Contents						
Save to Clipboard	199 1	rows found				Refresh Close
	1001					

(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).