



# Cleaning Up Folder & Document Security

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# A Few Things to Note:

- This session is being recorded.
- The recording will be automatically Emailed to all registrants of this session, as soon as it becomes available.
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# After this session you will be able to:

- Set security settings for:
  - Document Root
  - Folder
  - Subfolder
  - Document
  - Group
- Identify how cascading impact folders and documents





# This session assumes you already:

- ✓ Know how to create a folder and subfolder
- ✓ Know how to create a group
- ✓ Know how to upload a document
- ✓ Have a basic understanding of folder security and cascading

# Security at Document Root

The screenshot displays the 'Security' tab for the 'Documents' folder at the 'Document Root'. The 'Documents' folder is highlighted with a green box and a callout. The 'Security' tab is active, showing a list of users and groups with their permissions. The 'Policy Development Team' is highlighted with a green box and a callout stating: 'This group can edit **all** folders and documents'. The permissions for this group are: View (checked), Audit (checked), Edit (checked), and Cascading (checked). The 'Users and Groups' section is also visible, showing a list of users and groups.

Document Root

Documents

General Content Assignments Security

▼ Add Users Or Groups

☐ View ☐ Audit ☐ Edit ☐ Cascading

☒ View ☒ Audit ☒ Edit ☒ Cascading

?

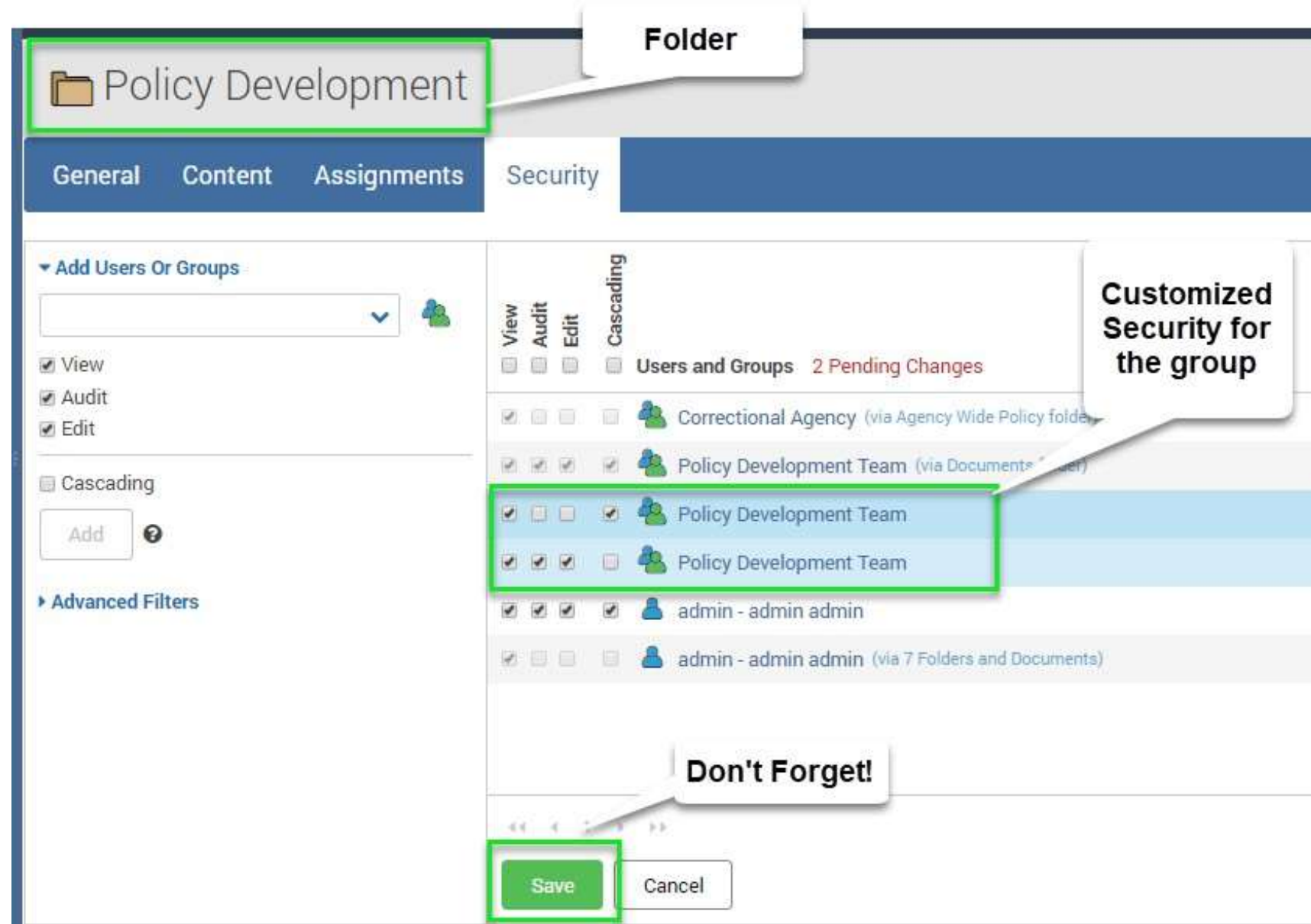
► Advanced Filters

Users and Groups

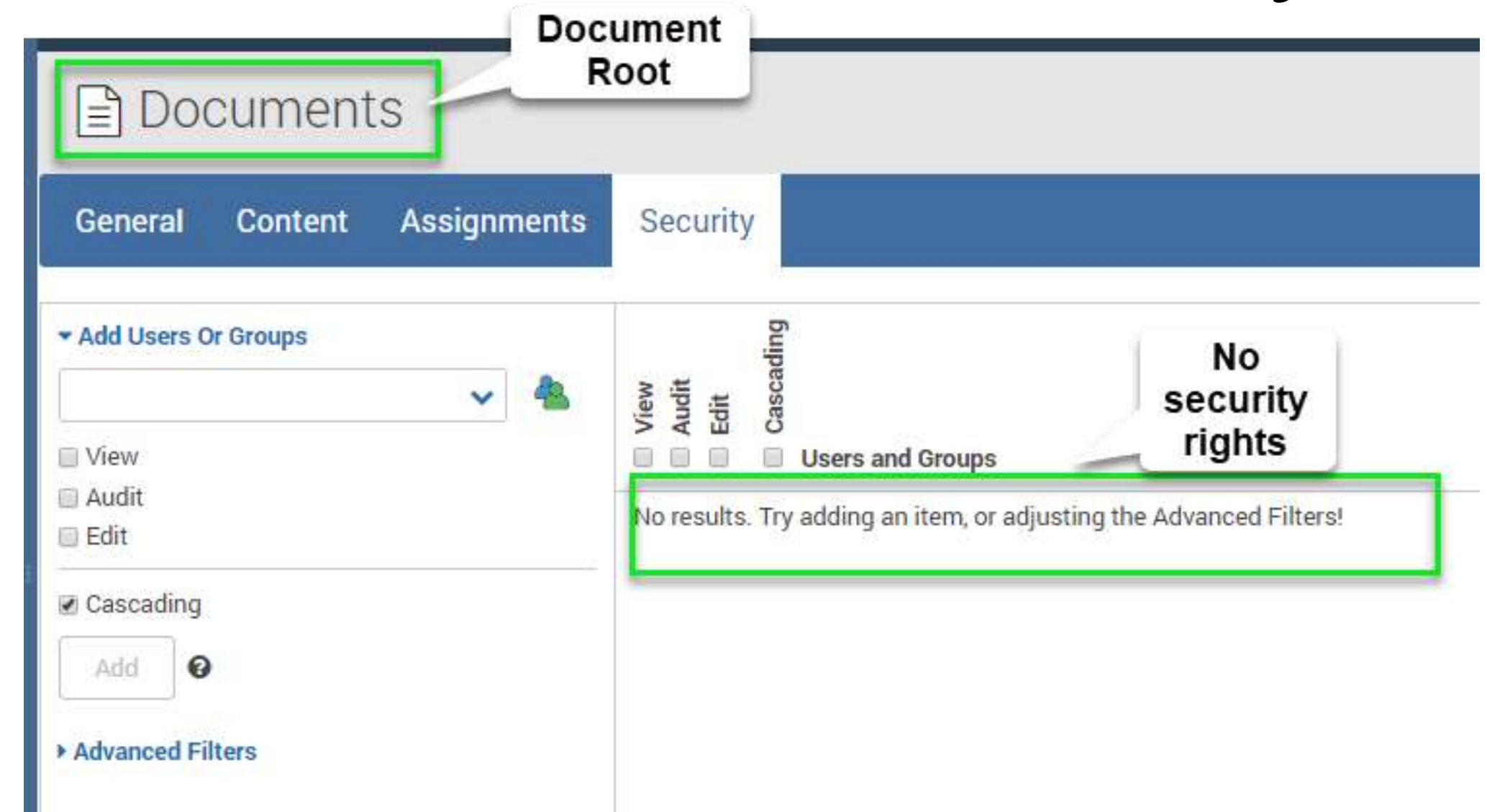
☒ ☒ ☒ ☒ Policy Development Team

This group can edit **all** folders and documents

# Folder Security vs. Document Root Security



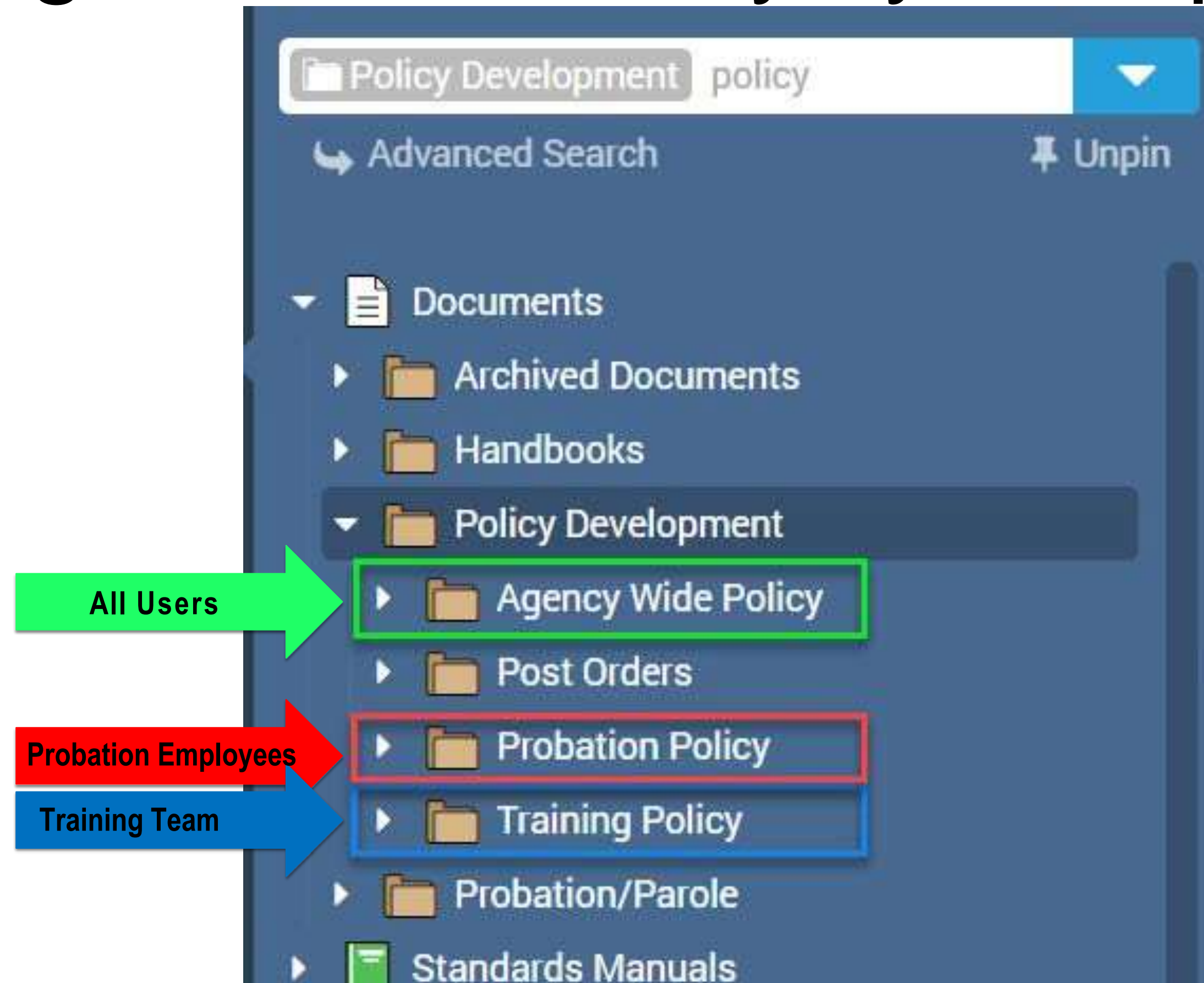
The group has the ability to create and edit their OWN documents but see ALL documents in this folder.



Only the Master Administrator can create documents and folders from the root.



# Designating Folder Security by Group





# PowerDMS Tip

Recognize that you are in control of everything your groups of users can:

- View (see)
- Audit (run reporting on)
- Edit (modify, add, or remove)

You can and should be strategic and purposeful with what access level you provide to whom.

# Group Settings – Create Privilege

## Create Rights

☐ Users

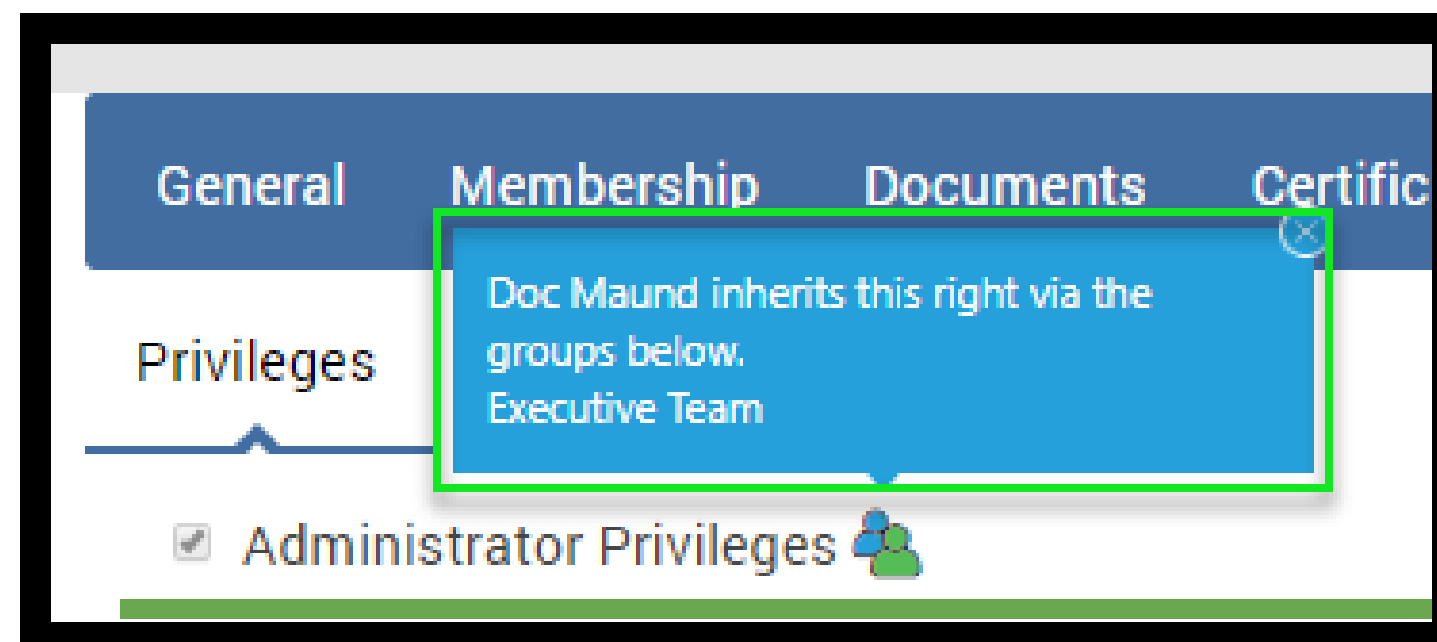
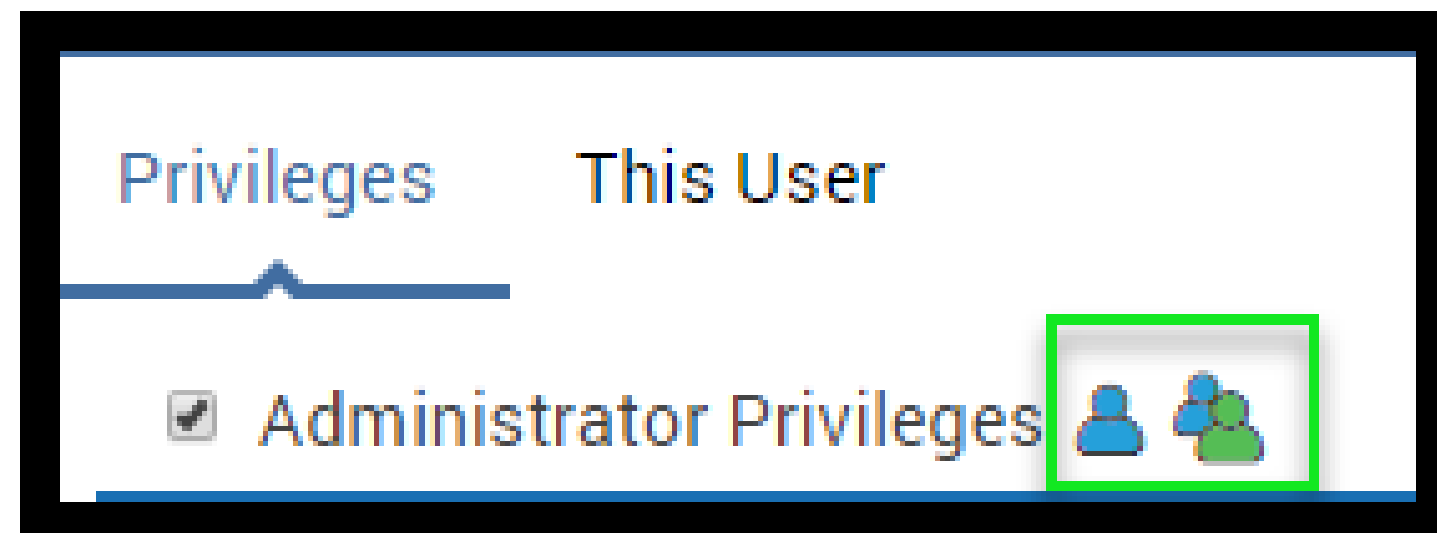
☐ Documents  Action Required

☐ Standards Manuals

☐ Tests

**Must check  
before your  
group can  
create a  
document or  
folder!**

# Group and User Settings – Revoke Privilege



## Privilege Change

### Revoke Create Document Privilege

The Create Document privilege is now tied to having edit rights at a folder. To remove or revoke this user's Administrative Privileges and/or remove the edit rights they have on folders.

1. Navigate to a Folder or a Group.
  - From a Folder select Security Over This Folder.
  - From a Group select Folders under Rights and Assignments.
2. Remove Edit over the folder.

Edit rights allow a User or Group to create documents and folders within that folder.

Multiple ways to achieve the SAME goal!

This screenshot shows the 'Security Over This Folder' settings for 'Training Resources'. The 'Edit' checkbox is checked, and the 'Cascading' checkbox is also checked. The 'Users And Groups' section shows 'matt - Matt Lavoie' with a checkmark in the 'Edit' column. A 'Got it!' button is at the bottom.

# Group Settings – Report Privilege

**MUST** be checked before a group can generate any reporting on content (policies, tests, assessments, etc.) or groups/users.

## Create Rights

- ☐ Users
- ☐ Documents
- ☐ Standards Manuals
- ☐ Tests
- ☐ Surveys
- ☐ Courses
- ☐ Certificates
- ☐ Groups
- ☒ Reports



Privileges

Folders

Documents

Standards Manuals

Assessments

Courses

Surveys

Tests

Certificates

Groups

Users

▼ Add Folders

▼

📁

☐ Sign

☐ View

☐ Audit

☐ Edit

☒ Cascading

Add

?

► Filter Folders

Sign

View

Audit

Edit

Cascading

☐ Folders

Child Folder 2 (via Departmental Policies folder)

☐ ☒ ☒ ☒ ☒

Personnel / Policy Manual / Departmental Policies / Memorandums / Forms / HR

Child Folder (via Departmental Policies folder)

☐ ☒ ☒ ☒ ☒

Personnel / Policy Manual / Departmental Policies / Memorandums / Forms / HR

Compliance Folder (via Departmental Policies folder)

☐ ☒ ☒ ☒ ☒

Personnel / Policy Manual / Departmental Policies / Memorandums / Forms / HR

Container Folder (via Departmental Policies folder)

☐ ☒ ☒ ☒ ☒

Personnel / Policy Manual

Departmental Policies

Privileges

Folders

Documents

Standards Manuals

Assessments

Courses

Surveys

Tests

Certificates

Groups

Users

▼ Add Groups

▼

👤

☐ View

☐ Audit

☐ Edit

☒ Cascading

Add

?

View

Audit

Edit

Cascading

☐ Groups

☒ ☐ ☐ ☐

All Users (via Direct Reports group)

☒ ☒ ☐ ☒

Direct Reports

📘 Cascading security applies to both the group and its members. View Example



# PowerDMS Tip

To ensure your groups can create documents or subfolders within any given folder, the group **MUST** have **TWO** security settings established:

1. **Documents** must be checked in the group's create privileges
2. **Edit** security rights to a folder or subfolder

# Cascading and Folders

The screenshot displays the 'Security' tab in the PowerDMS interface. It features a table of user permissions and a sidebar with configuration options. Callouts provide context for specific settings:

- Gives the ability to create subfolders and documents:** Points to the 'Cascading' checkbox in the sidebar.
- Multiplies "view" rights to all documents and subfolders in the folder:** Points to the 'View' checkbox for the 'JonR - Jon Riggs' user.
- Gives the ability to see documents:** Points to the 'View' checkbox for the 'JonR - Jon Riggs' user.

	View	Audit	Edit	Cascading	Users and Groups
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Users and Groups
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Police
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	adm
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	adm
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	admin
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	JonR - Jon Riggs
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	JonR - Jon Riggs

**General** | **Content** | **Assignments** | **Security**

▼ Add Users Or Group

☐ View  
☐ Audit  
☐ Edit

☒ Cascading

Add ?

► Adv







# PowerDMS Tip

Layering security settings at the folder level allows you to:

1. Specify which subfolders and documents users can access with less effort than making those settings at the individual subfolder or document.
2. Easier to manage if you want to make changes!

# Document Security Versus Folder Security

Edit rights set  
to the  
document

View	Audit	Edit	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Users and Groups
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 Policy Development Team (via Documents folder)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 Probation Users (via Amanda Bradford folder)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 Probation Users
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 admin - admin admin
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 admin - admin admin (via 2 Folders)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 JonR - Jon Riggs

Edit rights  
set to the  
folder



# You should now be able to:

- Set security settings for:
  - Document Root
  - Folder
  - Subfolder
  - Document
  - Group
- Identify how cascading impact folders and documents



