PowerDMS
by NEOGOV

Understanding Folder Security

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PowerDMS by NEOGOV

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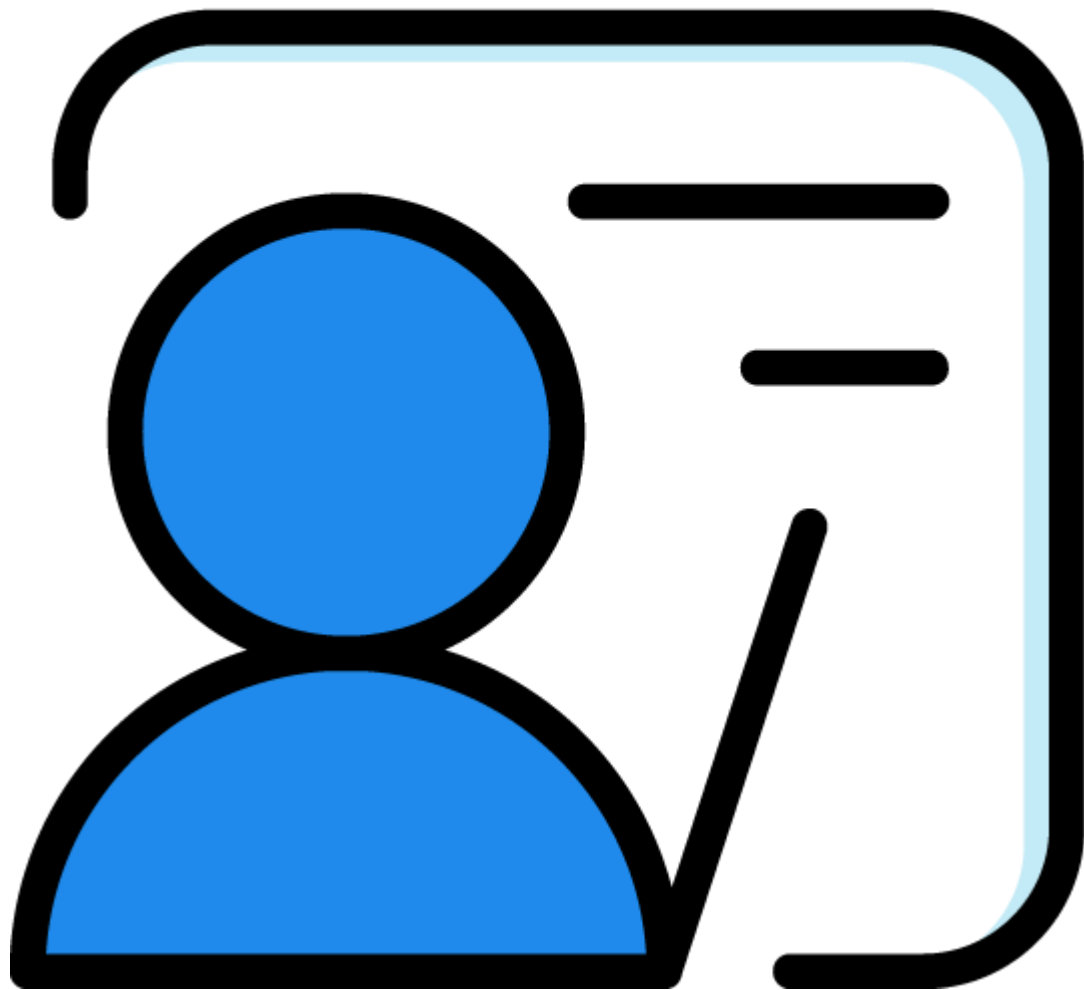
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After This Session, You Will Be Able To:

- Recall the steps to create a folder structure in PowerDMS.

- Add security to folders.

- Layer security for groups in folders within PowerDMS.

- Ensure groups have the right privileges and security to folder content.

- Utilize PowerDMS Analytics to assist with reporting.

What terms are used for Folders?

✓ Parent Folder (also known as folder): Is the initial folder within the document root located in the side bar in your PowerDMS site.

✓ Child Folder (also known as a sub-folder or nested folder): Is a folder that is created within a Parent folder.

✓ Nested Folders: Is a folder that is stored within another folder.

✓ Folder Hierarchy: A parent folder that is created below the initial document root structure and that has its own nested folders and/or documents.

Scenario 1:

Stephen and Beverly belong to the 1 – HR Supervisor group. Create a parent folder called "1 – Human Resources" and then create two child folders at the same level: Training Documents and HR Investigations. Assign the following privileges:

✓ The group needs to be able to run reports on all documents within the folder hierarchy.

✓ Ensure the group can only add/delete/modify documents in the HR investigations folder.

Scenario 1 Solution:

✓ Create Parent Folder 1 – Human Resources folder.

✓ Create two child folders (Training Documents and HR Investigations

✓ Provide 1 – HR Supervisor group with audit/cascade rights to the 1 – Human Resources Folder.

✓ Provide 1 – HR Supervisor group with edit rights to the HR Investigations folder.

Scenario 2:

The Human Resource Team wants to add their Board of Directors to PowerDMS and give them the privilege to run reports and make edits within their own BOD folder.

- ✓ Create a group called 1- HR BODs

- ✓ Create a sub-folder to 1 – Human Resources called BOD

- ✓ Ensure the group can only add/delete/modify documents in the HR investigations folder.

- ✓ Ensure the group has ability to run reports on all content in the 1 – Human Resources folder and any personnel in the 1 – Human Resource groups.

Folder and Document Resources

Documents

[Uploading Documents](#)

[Document Best Practices](#)

Folders

[Creating and Assigning Folders](#)

[Folder Security](#)

Reporting

[Document Reports](#)

You Should Now Be Able To:

- Recall the steps to create a folder structure in PowerDMS.

- Add security to folders.

- Layer security for groups in folders within PowerDMS.

- Ensure groups have the right privileges and security to folder content.

- Utilize PowerDMS Analytics to assist with reporting.