

Document Management Roles and Security

All files and folders reside in containers called knowledge centers. The access levels that any user is granted on those files and folders is typically inherited by their access level to the knowledge center. See also: [Knowledge Center Security](#) and [Configuring Security for Groups](#). All users with access to a knowledge center or folder must be one of three types of users: Read-Only, Author, or Administrator.

Role	Description
No Access	Users cannot use the knowledge center or folder.
Read Only	View and download files. No changes to content can be made, such as uploading files or creating new folders.
Author	Authors of a knowledge center or folder can upload and download files.
Community Administrator	<p>Every Community has at least one user designated as a Community Administrator. This user is responsible for the content of the organizational community home page. Community Administrators are also able to create content that pertains to their Communities. Community Administrators are responsible for the content that users upload to knowledge centers, as well as for approving users who apply for access.</p> <p>A Community Administrator is different from an Administrator of a knowledge center or folder. Community Administrators can be knowledge center or folder Administrators, but they also have more permissions in the Document Management — Community Administrators can create Organizational Community Knowledge Centers and can feature Files in the Document Management Channels that are in their Portal Community home page. A user who is designated an Administrator of an Organizational Community Knowledge Center is not necessarily a Community Administrator.</p>
Knowledge Center / Folder Administrator	Administrators of a knowledge center or folder have the highest level of access — they have all possible permissions over the content of that knowledge center or folder. Administrators can view all content (including forums related to documents), add new Files/Folders, delete Files/Folders, add/remove users, and change user access levels. The first Administrator is always the Creator of the knowledge center or folder. The Creator can then select other users for access. Any users the Creator designates for Administrator access will have the same options over the knowledge center or folder that the Creator does. The Creator can be removed from administrative access at any point in time by another administrator.

If you have High Security configured for Internet Explorer, Appian must be added to the list of Trusted Sites.

Configuring Knowledge Center Security

Security settings are applied at the knowledge center (KC) level and cascade down to folders, subfolders, and files in those folders. In this manner, access to the files and folders within a KC is restricted to the pool of users (or groups) who are associated with the KC. KC security is managed with rules and user roles. Users must have access to a folder (and be subscribed to the KC where the folder is located) to view the files in that folder.

Folder security can be decoupled from the parent KC and modified to allow different security levels for the users and groups associated with a folder than those inherited from the parent knowledge center. Users and groups can also be removed from having access to a folder.

[Security diagram.gif](#)

To assign different users to a folder than the users who are associated with the parent KC, you can [use a process](#). You can also [remove users from a folder](#), if they do not have Administrator or Deny rights for the KC.

Subscriptions

You must [subscribe](#) to a knowledge center in order to view files in that knowledge center. The **Subscribe** button appears in the toolbar when viewing a knowledge center that you have not subscribed to.

Subscription requests are automatically granted, unless the knowledge center security rules require administrator approval.

Configuring KC Security Rules

The following security rule options are available when creating a KC and when editing KC security. You must have administrator rights for a KC to modify its security rules (if you do not have administrator rights for the KC, the security button does not appear).

When editing an existing KC, these options appear on the **Rules** tab of the Security dialog box.

- Determine the following policies for the KC.
- How should users gain access? Select each user and group, or give all users read access.
- Should the knowledge center (and the files it contains) be indexed for searching?
- Should changes to the knowledge center require administrator approval?

Select one of the following security options.

High Security

- You must select each user who can access the KC.
- The KC (and the files it contains) are not displayed in search results.
- All changes to the files contained in the KC require approval by the KC administrator.

Medium Security

- You must select each user who can access the KC.
- The KC (and the files it contains) appear in search results.
- File changes are posted without requiring approval by the KC administrator.

The medium security classification also includes KCs where:

- All users must be selected
- Changes do not require approval
- The KC is excluded from search results

Low Security

- Any user who applies for access is automatically approved for read-only access.
- The KC (and the files it contains) appear in search results.
- File changes are posted without requiring approval by the KC administrator.

Custom

Apply any of the following security options.

- Users require administrator approval to gain read-only access to the KC
- Hide Knowledge Center from search results
- Require administrator approval for all KC changes
Selecting custom security options that match a preset security level changes your selection from **custom** to the matching level.

Adding Users or Groups to a Knowledge Center

- View the contents of the KC. The Security button appears on the toolbar.
- Click **Security**. The Security dialog box is displayed.
- Click **Add Users and Groups**. The Choose Users and Groups combination box (picker) is displayed.
- Select the user, users, or groups you want to list as having rights for the KC. Click **OK**. The users and groups selected are listed in the Security dialog with Administrator rights.
- Assign each user or group the right to perform actions for the KC. The following rights are available.

Action	Administrator	Author	Read-Only
Subscribe To/Unsubscribe From KCs	X	X	X
View File Properties	X	X	X
View Knowledge Centers	X	X	X
View Usage Reports	X	X	X
Create Folders	X	X	
Upload Documents	X	X	
Change KC Creator	X		
Create New Knowledge Centers	X		
Delete Folders	X		
Edit File Names	X		
Edit File Descriptions	X		
Manage KC Access Requests	X		
Manage KC Security	X		
Move KCs	X		
Show User Statistics	X		
View Administration Page	X		
View KC Change Approvals	X		
View KC File Expirations	X		
View KC Properties	X		
View KC Statistics Interface	X		
View Unsubscribed KCs	X		

View User Alerts	X
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Deny

- Users associated with the **Deny** role cannot use a knowledge center or folder.

When a user is added to a knowledge center, they receive a notification that contains a link to the knowledge center, unless the user has changed their notification settings to not receive the alert.

See also

[Document Management](#)