

Configure default instance security

When you create a document, the document automatically gets a set of permissions. These permissions are preconfigured on the document class. This default set of permissions is called Default instance security.

Characteristics of Default instance security

Default instance security is:

- an access control list (ACL) that is configurable at the class level
- set on the class definition properties page
- used as the source for default security when objects are instantiated
- applied only one time (during the creation of the object)

By default, the creator of an object has Owner access and you can remove #CREATOR-OWNER from the default instance security to override this behavior.

When you change default instance security, you can choose to propagate the change to child classes or not. Changes to default instance security do not affect existing objects. You can use Bulk Operations for updating security on existing objects. Direct security of the object can be modified during or after instantiation.

You will learn about the Bulk Operations in a different section of this course.

Benefits of Default instance security

Default instance security:

- determines the initial proposed security of an object
- is applied automatically
- is used to enforce consistency in assigning initial security

Activity: Configure default instance security for an object class

In this activity, you configure default instance security on a document class. Whenever an instance of that class is created, its security is determined by the default instance security.

Important: This activity builds on the previous activities under the Security topics, and so ensure that the previous activities are completed.

In this activity, you will accomplish the following:

- Set default instance security on a new document class.
- Verify default instance security.

Set default instance security on a new document class.

In this task, you will create a property template and a document class, and set the default instance security. In the earlier activity, you have already practiced adding a property template and a class.

- In the **Mozilla Firefox** browser, click the **ACCE** bookmark or type the following URL: **<http://vclassbase:9080/acce>**
- Type **p8admin** for the **User name** field, **FileNet1** for the **Password** field, and then click **Log In**.
- On the left pane of the **EDU_P8** tab, expand the **Object Stores** folder click the **Finance** object store.
- From the **Finance** tab, expand the **Data Design** node on the left pane, right-click **Property Templates**, and then click **New Property Template**.
- From the **New Property Template** tab on the right pane, type **Invoice Number** for the **Display name** field.

The Symbolic Name and Description fields are automatically populated.

- Click **Next** and then select **String**, from the list, for the **Data type** field.
- Click **Next** two more times and then for the **Single or multi-value** field, select **Single**, and click **Next**.
- Click **Finish** and then click **Close** on the **Success** page.
- In the **Finance** tab, click **Refresh**.
- Expand the **Data Design > Classes** node on the left pane, right-click **Document** and then click **New Class**.
- In the **New Document Class** tab, type **Invoice** for the **Display name** field.
The Symbolic Name and Description fields are automatically populated.
- Complete the wizard by clicking **Next**, **Finish**, and then **Close**.
- In the **Finance** tab, click **Refresh**.
- On the left pane, expand the **Data Design > Classes > Document** node, and then click **Invoice**.
- From the **Invoice** tab on the right pane, click the **Property Definitions** subtab and then click **Add**.
- On the **Add Properties** page, type **Invoice** in the filter to show the property template that you added.
- Select **Invoice Number** and then click **OK** to close the **Add Properties** page.

- On the **Invoice** tab, verify that **Invoice Number** is listed and then click **Save**.
In the following steps, you will configure the default instance security for the class that you created.
- On the **Invoice** tab, open the **Default Instance Security** subtab.
- Review the ACL list under **Access Permissions**, click **Add Permissions**, and then select **Add User/Group Permission**.
- On the **Add Users and Groups** page, search for **Finance managers**, select it from the **Available Users and Groups**, and move the group to the **Selected Users and Groups** by clicking the forward arrow.
- Select **Finance managers**, scroll down to the **Permissions** section, select **Full Control** for the **Permission group** field, and then click **OK**.
- On the **Invoice** tab, verify that **Finance managers** is listed (with **Full Control** for the **Permission Group** column) and then click **Save**.
- Repeat the steps to add **Finance clerks** with **Major Versioning** for the **Permission group**.
- On the **Invoice** tab, click **Save** to save the Invoice class properties.
- On the **Invoice > Default Instance Security** subtab, select **#CREATOR-OWNER** by clicking the box and then click **Edit**.
- On the **Edit Permissions** page, select **Major versioning** for the **Permission group** field and then click **OK** to close the page.
- Click **Save** on the **Invoice** tab and then click **Refresh**.
- Under the **Access Permissions** section, verify that the **#CREATOR-OWNER** and **Finance clerks** rows now have **Major versioning** as its **Permission Group**.

Class Definition: Invoice

General Properties Property Definitions Default Instance Security

Access Permissions

Add Permissions... Edit... Remove

<input type="checkbox"/>	Name	Source	Permission Type	Permission Group
<input type="checkbox"/>	#CREATOR-OWNER	Direct	Allow	Major versioning
<input type="checkbox"/>	Finance clerks	Direct	Allow	Major versioning
<input type="checkbox"/>	Finance managers	Direct	Allow	Full Control
<input type="checkbox"/>	p8admin	Direct	Allow	Full Control
<input type="checkbox"/>	p8admins	Direct	Allow	Full Control
<input type="checkbox"/>	p8users	Direct	Allow	View content <Default>

- Log out of the Administration console, clear the browser cache, and close the browser.

Verify default instance security.

In this task, you will log in to the IBM Content Navigator (ICN) desktop as Carol who is a member of Finance clerks, create an Invoice document, and verify the security settings.

- In the **Mozilla Firefox** browser, click the **Finance Desktop** bookmark or enter the following URL: **http://vclassbase:9081/navigator/?desktop=FinanceDesktop**
- Type **Carol** for the **User name** field, **FileNet1** for the **Password** field, and then click **Log In**.
- Expand the **Finance** repository > **Invoices** folder on the left pane and then click **Carol**.
- Click **Add Document** from the toolbar.
- In the **Add Document** page, for the **What do you want to save?** field, click **Browse**.
- On the **File Upload** page, navigate to the **C:\Training\F2810G\SampleDocs** folder, select any file (Example: **MarketingPlan1.pdf**), and then click **Open**.
- Back on the **Add Document** page, Select **Invoice** for the **Class** field and then edit the text to **Invoice 1** for the **Document Title** field.
- For the **InvoiceNumber** field, type **123**, scroll down and then click **Add** on the lower right.
- Back on the **Browse** page, verify that the new document is listed.
- Right-click the **Invoice 1** document, select **Properties**.
- On the **Properties** page, click the **Security** tab and verify the default instance security settings.

Properties	Security	Versions	Folders Filed In	Parent
<div> <div>Users and Groups</div> <div>Roles</div> </div>				
<div> <div>Share with: ⓘ</div> <div>Specific users and groups</div> <div>Select...</div> </div>				
<div> <div>Owner:</div> <div>Finance managers ✕</div> <div>p8admin ✕</div> <div>p8admins ✕</div> </div>				
<div> <div>Author:</div> <div>Carol ✕</div> <div>Finance clerks ✕</div> </div>				
<div> <div>Reader:</div> <div>Script testers ✕</div> <div>p8users ✕</div> </div>				

As you configured, the Finance managers have full control along with P8admins. Finance clerks and Carol has Author access. Notice that the document creator (Carol) is not listed as the owner. P8users and Script testers have Reader access.

The list of available security settings is different in IBM Content Navigator (ICN) as compared to Administration Console for Content Platform Engine (ACCE). ICN presents some aggregations of security settings to give end users a more intuitive set of options, whereas ACCE provides a much more granular set of options.

- Click **Cancel**, log out of ICN **Finance Desktop**, and then close the browser.