## 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.

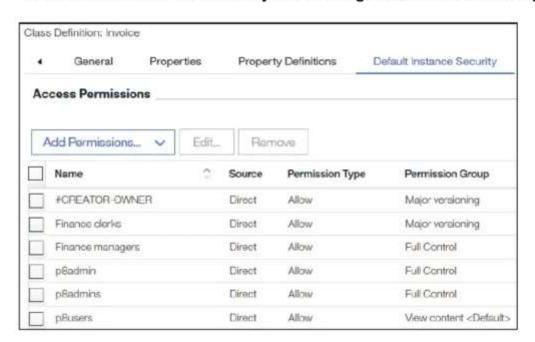
In this task, you will create a property template and a document class, and set the default instance security. In the earlier activity, you have already practiced adding a property template and a class.

- 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.

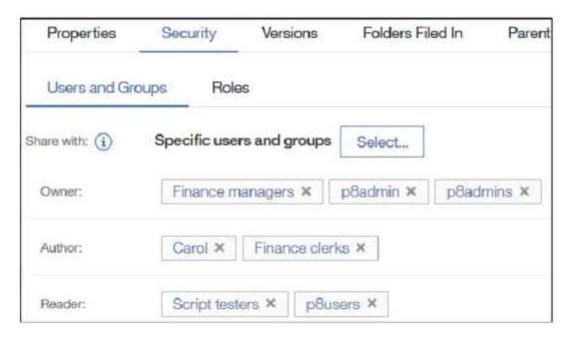


 Log out of the Administration console, clear the browser cache, and close the browser.

### 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.



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.