

Rights management

Guilhem VERGON - 2024-07-03 - Configuration and administrator monitoring

Rights management

For rights management, there are simple and advanced modes.





Both modes can be picked for every folder, simple mode is faster while advanced mode allows more precise management.

READ, MODIFY and **INVITE** = [Browse, Consult, Download] + [Add, Edit, Delete] + Invite

For every folder you can set proper rights for users or groups.

How to manage rights on folders ?








To grant rights on a folder :

- **Go to your NetExplorer platform**, spot your folder.
- Right-click on it and select "**Details**"
- On the right of the screen you can see the timeline of the folder, spot the name and click on the symbol  to access **Administrator options**.
- Sélectionnez **Manage access rights**.
- Click button 
- Spot user or group then click on  and then 
- Add rights by ticking the boxes you want to set (e.g. read, edit, delete...).
- Click "**SAVE**" to confirm modifications.

What are the rights for simple mode ?

- **Read** : See documents, read content, read folder content and download files and folders.
- **Edit** : Edit documents (rename, delete), create files or folders, edit them, copy/paste or drag'n'drop files or folders.
- **Invite**: Allows to invite internal or external people (depends of configuration set by admin).

What are the rights for advanced mode ?

-  **Browse** : Allows navigation in folders, useful to regroup folders without break in the folder tree. Careful, these rights do not duplicate on children folders.
-  **Consult** : See documents in folders and open preview, do not allows to download.
-  **Download**: Download children elements of folder (including children folders).
-  **Add**: Create folders or document in a folder, or add an external one. This right does not allow to modify existing documents.
-  **Modify** : Modify documents or folders.
-  **Delete**: Delete documents or versions, or a folder.
-  **Invite**: Invite internal or external people in folder.

To **copy/paste** a folder, you need to have at least the 4 first rights ticked in your right's line : **browse, read, download, add**.

Platform software creates a new folder with the same rights than the copied one, then add inner elements one by one.


If you don't have the right to **Add**, then you will get an error message "**Insufficient rights**"

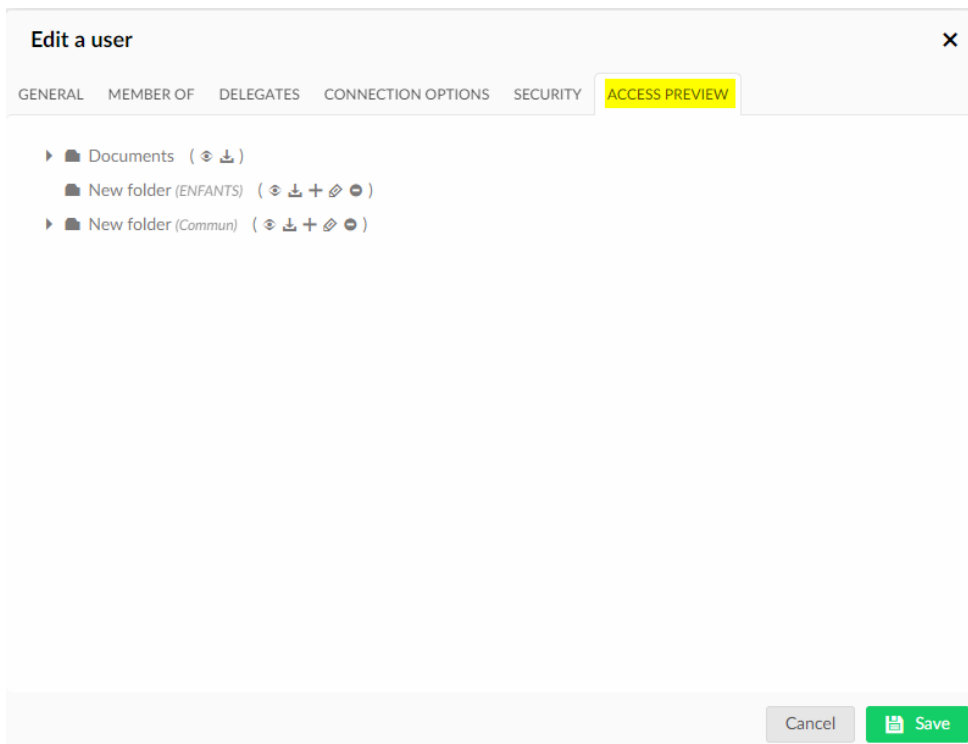
According to the action you wish to make on a file, its parent folder must have the following rights ticked :

- **browse, read, download, add** : copy/paste document
- **brows, read, download, add and modify** : to modify document

Control rights of users

To control rights of users in the blink of an eye :

- **Go to your NetExplorer platform**, then in **platform management**, go to **Users tab**.
- Spot the user and click on 
- In user details, select tab **ACCESS PREVIEW**.
- The filetree displays and you can see between commas (X) the rights applied for every folder where he/she has rights, according to symbols of the advanced rights management.




This part is very handy when you need to check previously granted rights.

Save modifications in recursive or non-recursive way

When you modify rights on folders, you can do so :

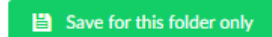
- **recursive** : modifications will be applied for children folders and files (below in filetree)
- **non-recursive** : modifications will be applied for current folder only.

You can save :

- recursive : click the button 

The changes will NOT be applied to sub-folders.

- non recursive : click the down arrow then



Notes

A user can combine rights he/she has personally and through groups.

→ A user inherits rights from a group, and will cumulate with personal rights, but **user rights always prevail over group rights**.

As an example :

EMCINTOSH belongs to the SALES SERVICE group, but he's not allowed to browse this folder

or to do specific actions. By adding a personal right to this folder, and un-ticking boxes, his rights will be restrained.

Define the access settings for this folder ✕

Documents/COMMERCE/Plaqueette en fabrication/ 0 B Advanced mode + Add

| USER OR GROUP ^ | INVITATION | ↑ | 🔍 | ↓ | + | 📄 | 🗑️ | ← | ACTIONS ⋮ |
|------------------------------|--------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-----------|
| Administrateurs 2 Members | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| SALES SERVICE 3 Members | by Nicolas Arbouin | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| EMCINTOSH | by Nicolas Arbouin | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

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On the opposite, if a user has to get more rights than its group grants him/her, you can add a personal line of rights and tick more boxes than the group owns.

Define the access settings for this folder ✕

Documents/COMMERCE/Proposition commerciale/ 12.8 MB Advanced mode + Add

| USER OR GROUP ^ | INVITATION | ↑ | 🔍 | ↓ | + | 📄 | 🗑️ | ← | ACTIONS ⋮ |
|------------------------------|--------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-----------|
| Administrateurs 2 Members | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
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