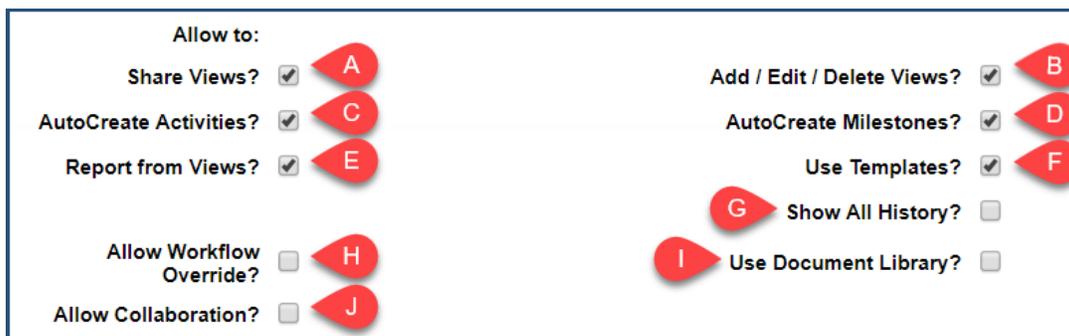# User Permissions: Tips and Tricks

Security Permissions in UCM are set up through a series of folders with permissions being granted or denied per user. You do have the option to set up Role Models, which act as user permission templates, so you can quickly apply a set of permissions to any user. Aside from just folders, you can also use Contract Types as a way to limit visibility for your users. There are also a few tricks that can make setting up a new user, or managing an existing user, much quicker and easier.

Basic User Permissions: *Allow To*

Before we get to folder permissions, your user has a few checkbox options right underneath the User Info section that can adjust what they are allowed to do. Depending on the user type (*Admin, Full-Access, Read-Only, No-Login/Template*) the options may be slightly different, but they are fairly consistent, and easy to understand their function:

- (A) ***Share Views***: Share any user created views with others in your company
- (B) ***Add/Edit/Delete Views****:* Enable or Disable the Users ability to work with Views
- (C) ***Auto Create Activities***: Outdated relic option from older version of UCM
- (D) ***Auto Create Milestones***: Outdated relic option from older version of UCM
- (E) ***Report Views***: Allows your user to create a Spreadsheet Report from their views
- (F) ***Use Templates***: Grants access to Templates (*if enabled in your system*)
- (G) ***Show All History***: Shows the entire history of whatever you're viewing. Leaving this box unchecked will make it so your user ONLY sees their history activity.
- (H) ***Allow Workflow Override***: Gives ability to swap out workflows on a contract container
- (I) ***Use Document Library***: Grants access to Document Library (*if enabled in your system*)
- (J) ***Allow Collaboration***: User can initiate and be involved in Collaboration conversations (*if enabled within your system*)

Basic User Permissions: *Contract Actions*

Right under the Allow To section, is a box called Contract Actions. These five checkboxes allow you to do mass changes and actions to your contracts. These are only available for Admins and Full-Access Users, and should be given out with extreme caution. We recommend only giving these permissions out when absolutely needed, and to even come back in and disable once the task that required them re completed.

- Ⓐ ***Delete Selected***: Delete all selected Contracts. There is no cost-effective way to retrieve deleted contracts within UCM. This is the most dangerous Action that could be performed. You do get a few pop-up warnings before completing the action, but use the most caution with this checkbox.
- Ⓑ ***Copy Selected***: Create a single copy of a contract container, including attachments if you wish. Works as a great tool if you have multiple contracts that are very similar, or you re-up with an old vendor and want to create a new container with the old history, while still preserving the original contract container.
- Ⓒ ***Modify Selected***: Change details of a container like Name, Owner, Type, Workflow, etc at a mass level. If the contracts are not selected carefully, lots of details about multiple contracts could get changed very quickly.
- Ⓓ ***Email Selected***: Outdated relic option from older version of UCM. Leave Unchecked. Replaced with Collaboration and Email tab from within contract container.
- Ⓔ ***Create Corresponding X Records***: Create Activities and Manual Milestones, or add Attachments or Notes, to Contracts on a mass scale. No much irreversible damage can be done with this option, but with any mass change options, it could take a decent amount of time to clean up any mess that could be made accidentally.

Basic User Permissions: *Folder Permissions*

After creating a User, and going back inside their profile from the Manage User section of Company Admin, you have a set of tabs towards the top that you can go into and edit different user settings. Folder Permissions is where you can give and deny access to different areas of your system.

Each Folder, and even down to each Contract within that folder, has the same set of checkboxes attached to it, that give you different options on what your user is allowed to do to the contracts within that folder:

- (A) ***Inherit Parent Folder Permissions*:** This checkbox will Inherit, or copy, the permissions of the Parent Folder, or in other words, the folder located above it. This allows you to have sub-folders within larger folders, and have any security setting cascade down.
- ***Change Contract Folder*:** Allow your User to change the Folder Location of a contract.
- ***Change Contract Owner*:** Allow your User to change the Owner of a contract.
- ***Be and Owner*:** Allow your User to be Assigned as an Owner
- ***Delete Document*:** Allow your User to Delete any Attachment Documents in the Container
- ***Edit Contract Type*:** Change the Contract Type. Will change the Field Groups, Workflow, and any other associated Contract Type Attributes of the container.
- ***Edit Contract*:** Allows your User to edit anything else that is not specifically covered by a separate checkbox here. *Ex: Fields and Field Groups*
- ***Delete Field/Field Groups*:** Allow your User to remove Fields and Field Groups from your Container.
- ***Create New Contract*:** Allow your User to create contracts using either Direct Entry or Templates.
- ***Download Contract Documents/Show Documents as View-Only*:** These two work as a toggle, as only one can be checked at a time. "Download" allows your user to download the attachment file to their hard drive. "Show" will only open the document file in a preview window, preventing it from being downloaded locally.
- ***View Contract*:** Gives your user access to see the Container and its contents.
- ***Create/Edit Alert Notification*:** Gives your User all the Alert Functions.
- (B) ***Save*:** After any changes are made to a Folder, you must Save to keep your changes. Each separate folder MUST be saved, or only your last changed setting will save.

Basic User Permissions: *Contract Types*

Another way that you can adjust what your user sees is through limiting the Contract Types, as well as Templates and Library Items, that your user can see. The important part to understand is that this is a *Limiting* function, not a "View All".

What that means is that you **CAN** have a Contract Type that contains sensitive information, and completely **REMOVE** a user's ability to see that Contract Type, **REGARDLESS** of their Folder Permissions. You **CANNOT**, however, have a Contract Type selected here, and allow that selection to give your User access to those Contract Type regardless of Folder Permissions.

In the image below, ALL of our Contract Types are selected, so that means that only our Folder Permissions are acting as barriers for this user. If we were to **Deselect** our BAA Contract Type, then regardless of the Folder Permissions given to our user, they would not be able to see any BAA Contract Types in our system.
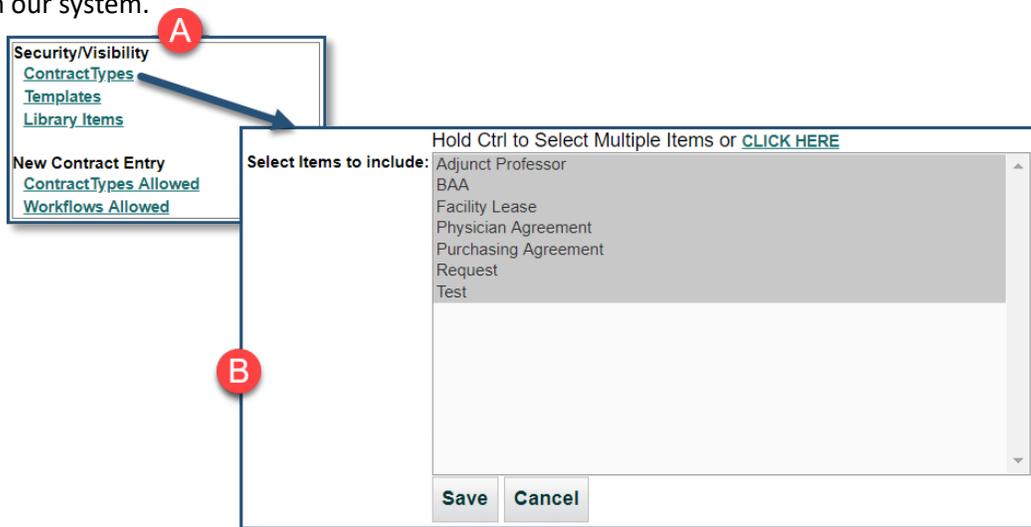
Each of the links in Box (A), which is located to the right side of the Edit User page, opens into windows that look like Box (B), where you can select and de-select any of the items to remove or grant visibility.

Under **Security/Visibility**, you have links to Contract Types, Templates, and Library Items, which selecting or deselecting here grants or removes your user's ability to SEE those items in your system.

Beneath **New Contract Entry**, you have links to Contract Types and Workflows which selecting or deselecting here grants or removes your user's ability to CREATE containers with those items.

Tips and Tricks: Role Model "Templates"

Most security features are also available to change and edit into a Role Model, which is in essence, a User Template within UCM. *Allow To* and *Contract Actions* are still set per user, but anything related to Folder Permissions or Contract Types are able to be set through Role Models. The layout may look a little different, but the features are all still there and easy to find. Each individual company will have their own different sets of User permissions, so there aren't too many "base" Role Models, but there are three that we use often, and could be useful for you and your company,

Everything Enabled/No Permissions

The first two are Role Models (RM's) that can give your user access to Everything in your system, and also one that locks down everything, and removes access to anything within the system. These are very easy to set up, and can be used a number of ways.

Everything Enabled: Can be used as a "base" template for a user who needs access to everything except a few areas. By using this RM to enable everything, you can know that the individual pieces you remove access to are the only thing that is being changed. It can also be used as a way to quickly promote a user to have full access with just a few clicks.

No Permissions: This "base" is a great way to clear out a User's permissions and give yourself a clean slate to work with. If you have a User who only needs access to a few folders or contract types, use the RM to clear out their permissions, and then only give access to what they need, knowing that there's nothing being missed. It can also be used as an extra safety precaution for a deactivated user.

- To set either of these RM's up, just head to the Role Model section of Company Admin, create your new Role Model, and then when you Save, you'll be able to go into Folder Permissions and Contract Types (etc.) to enable or remove all permissions.
- By default, all Contract Types are enabled, so you don't need to change any of those settings, just Folder Permissions, for **Everything Enabled**.

- Double click the **ALL** checkbox to on the top-most folder to set all the checkboxes to active. Its name will be the name of your particular company.
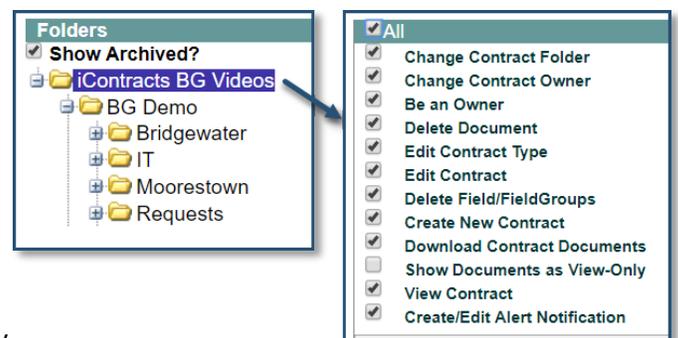
- Then click on the next folder down, which usually has the name *Contract Management System* unless you have multiple objects, and make sure the **Inherit Parent Folder Permissions** box is checked to verify that everything is turned on down beneath it. As long as the icons are all green checks like our image, this user will have access to the entire system now.
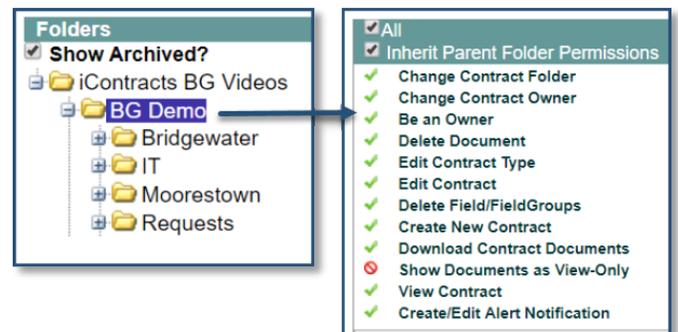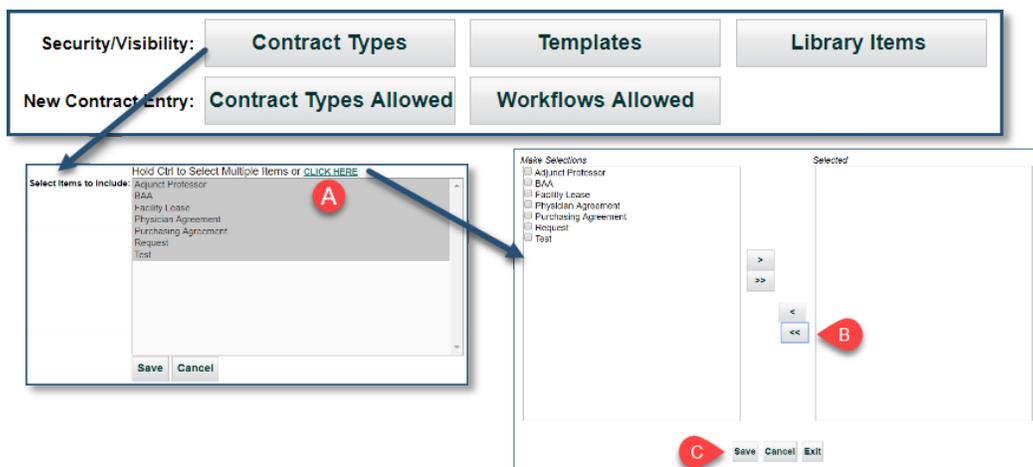
Tips and Tricks: Role Model "Templates" (*Cont.*)

- To set your **No Permissions** RM, follow the same steps as above, but obviously setting the checkboxes to inactive:
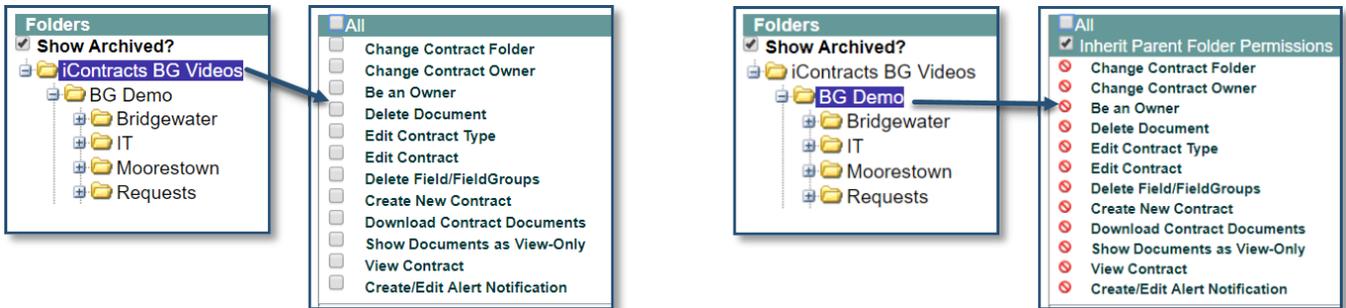
- In addition to Folder Settings, you will have to go into each of the five links under Security/Visibility and New Contract Entry to remove permissions to those items. By using the Left-Right pop up, you can quickly de-select all your items, which is especially helpful if you have many in each list.
- To do so:
  - o Choose which list you'd like to clear (**Contract Types, Template, Library Items, Contract Types Allowed,** and **Workflows Allowed**)
  - o Select the "Click Here" link at the top Ⓐ , which opens the Left-Right pop up
  - o Use the Double Left arrows (**<<**) Ⓑ , to move everything to the de-selected side
 - o Save Ⓒ , and repeat for the remaining lists

Tips and Tricks: Role Model "Templates" (*Cont.*)

"Read-Only" as a Full Access

There are some instances where you want a user to be Read Only for basically every way, except for one. By creating a "Read-Only" base, you can then add on any additional features that a Read-Only user cannot usually do, since they are technically Full Access.

Using the same process as before, set your Folder Permissions checkboxes to match below (*with you deciding with of the two Download/Show Document selections to choose*), and make sure the folders beneath are inheriting.
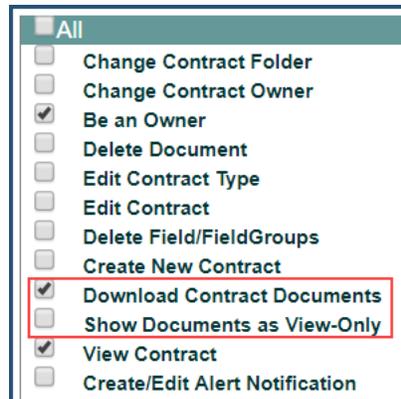
You can now apply this Role Model to any of your Users to use as a base, and then just add on any other permissions you'd like, such as Create New Contract or Edit Contract, if you want them to have some ownership and control of contracts, without having full access to everything else.

Applying Role Models

Placing a User under a Role Model is very easy to do, as it's just a drop down menu from within the User Profile page. Using this method, however, prevents you from being able to edit any of the user setting controlled by the Role Model, making the idea of a "base" set of permissions unusable. However, there is a way to Copy the permissions of a Role Model to apply to a user, and then you can continue editing those permissions per user. On the next page you can see how to use **Copy Permissions** as a way to make your Role Model into a base user template, as opposed to a governing set of global permissions.
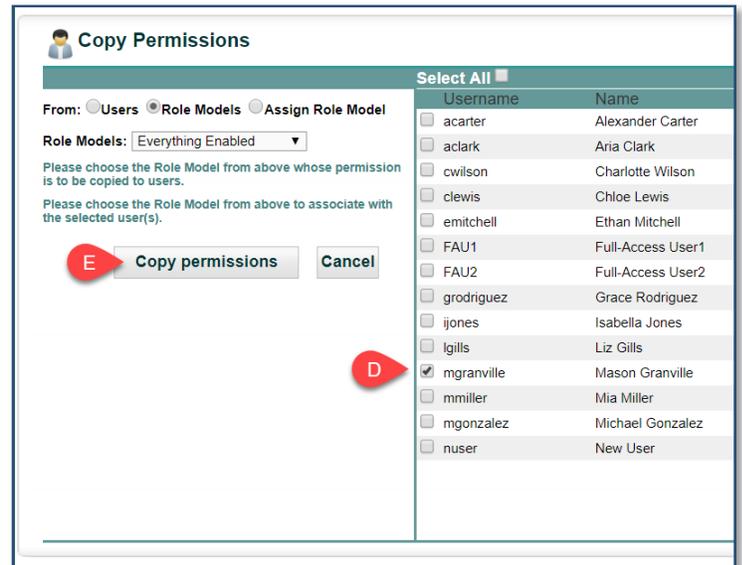
Applying Role Models (*Cont.*)

- From the Manage Users page, select **Copy Permissions** at the Top Ⓐ

Applying Role Models

- On the section to the left, select the **Role Models** radio button Ⓑ
- Choose the Role Model you want to apply from the dropdown Ⓒ
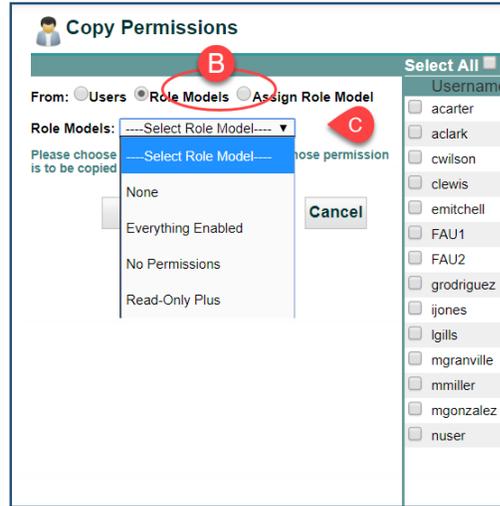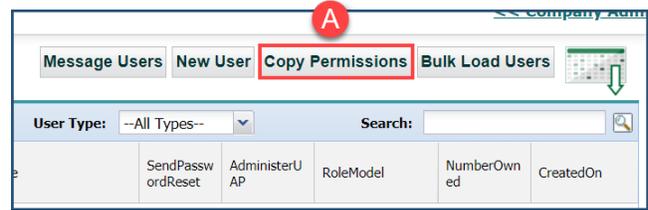
- Select the User or Users that you want to apply the RM to using the checkboxes next to their name in the section to the right

- Select **Copy Permissions**, Ⓔ , and wait for the green banner to appear letting you know the **Permissions Copied Successfully**