



Product: Database Accelerator (DBXL) v2.4

Title: How to configure permissions

There are four permissions levels available in Qdabra's Database Accelerator: DBXL Admin, Global Level, Document Type Level and Document Level. This document will provide you with an overview of these four alternatives.

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DBXL ADMIN LEVEL

DBXL Admin Permissions are initially defined when DBXL is being installed, though you can modify them later by editing web.config. The installer grants permissions to the BUILTIN\Administrators.

The main purpose of DbxlAdmin is to perform broadly-scoped tasks like:

- adding and removing licenses
- adding, modifying and deleting document types
- reshred documents
- Import/Export documents

However, no additional document permissions are granted (Read/Write/Delete) to this user. That is, the DbxlAdmin doesn't have access to some of the finer-grained operations like performing actions on individual documents. The Global Admin (see following section) has access to do these operations.

After installation, DBXL Admin Permissions can be modified by editing the value for the DbxlAdminAlias key in web.config, located in *C:\inetpub\wwwroot\QdabraWebService* for default installations of DBXL.



GLOBAL LEVEL

Global Level Permissions are also initially defined during installation. The groups or users who are set at the Global Level will have access to all the document type configurations and all the documents. By default, the BUILTIN\Administrators group will be granted Global Level Admin Permissions, while the Writer and Reader groups are blank.

There are three sets of permissions that can be set at the Global Level:

- **Admin:** The members of this group have access to manage the Document Types as well as all document permissions for the document types they manage.
- **Writer:** The members of this group can view and edit all documents, but they do not have access to view or edit the Document Type Configurations.
- **Reader:** The members of this group are only allowed to view all documents. They do not have access to edit the documents and also do not have access to view or edit the Document Type Configurations.

DISABLING GLOBAL PERMISSIONS DURING INSTALLATION

During installation you have the option of disabling these global permissions by clearing the **Set Global User Permissions** checkbox, which will result in restricting DBXL access to DBXL Admins. For this reason, disabling global permissions does not make DBXL “wide-open”. On the contrary, it makes access DBXL more restrictive. In the screenshot below, only members of the DBXLAdmins group will be able to successfully interact with DBXL because we have disabled global permissions.



Qdabra Database Accelerator v2.4

Site | Log On | Document Security | Active Directory Service | SQL Server

DBXL Admin:

☐ Enable Global User Permissions

Admin Group:

Writer Group:

Reader Group:

Browser Group:

Members of the DBXL Admin security group can add document types and manage access permissions to DBXL document types.

When global permissions are enabled, users in these groups will have the given access to all documents stored in DBXL. For fine grained permissions, uncheck to disable global permissions and set permissions on individual document types.

< Back Next > Cancel

MODIFYING GLOBAL LEVEL PERMISSIONS

After installation, Global Level Permissions can be modified by editing the value for the **ReaderGroupAlias**, **WriterGroupAlias** and **AdminGroupAlias** keys in web.config, located in *C:\inetpub\wwwroot\QdabraWebService* for default installations of DBXL. You can turn off Global Level Permissions by switching the value of the **CheckUserPermissions** key from *true* to *false*. The **BrowserGroupAlias** only allows opening the XSNs.

```
<!-- Global security settings -->
<add key="CheckUserPermissions" value="true" />
<!--
If CheckUserPermissions is false, the group aliases below
are used as defaults for new document templates if
no permissions are specified
-->
<add key="BrowserGroupAlias" value="NT Authority\Authenticated Users" />
<add key="ReaderGroupAlias" value="" />
<add key="WriterGroupAlias" value="" />
<add key="AdminGroupAlias" value="BUILTIN\Administrators" />
<add key="DbxlAdminAlias" value="BUILTIN\Administrators" />
```



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DOCUMENT TYPE LEVEL

Document Type level permissions are granted in the Permissions tab of DAT **for each Document Type**.

Note that the **Enforce Permissions** checkbox must be checked for the permissions in this tab to be enforced. You are able to enter as many users or groups as desired, by clicking the **Insert document type level permissions** link. This will insert a new row where you will need to enter a name (an identifier of your choosing) and the user or group (Role Name). Then, for each of these rows, you will be able to grant the following permissions: **Add, Read, Write, L-Read, L-Write, Del** and **Admin**.

In the example below, the managers group has Admin permissions over the Document Type, while the Readers group only has Read access.

DATABASE ACCELERATOR Administration Tool

Document Type: QdNotification

Save Save As... Catalog

General Database **Permissions** Promoted Properties Documents Taxonomy Tree

☒ Enforce Permissions

Document Type Level Permissions

At least one role must be given Admin permission at the document type level. Otherwise a global DBXL admin is required to edit the document type. Only one user should be configured per row. Do not list users delimited with semicolons.

Name	Role Name	Add	Read	Write	L-Read	L-Write	Del	Admin
example	domain\managers	☒	☒	☒	☒	☒	☒	☒
example2	domain\readers	☐	☒	☐	☐	☐	☐	☐

☒ Insert document type level permissions

Document Level Permissions

Name	Membership XPath	Read	Write	L-Read	L-Write	Del
☒ Insert document level permissions						

Note the following:

- Checking the Admin checkbox will check the other six checkboxes.
- Checking the Write checkbox will check the Read and L-Write checkboxes.
- L-Read Permissions are not currently in use and are reserved for future use.
- Only one user or group can be added per row. Do not insert lists separated by commas, semicolons or other delimiters.



DOCUMENT LEVEL

Document Level permissions are also established in the Permissions tab of DAT. As with Document Type Level Permissions, the **Enforce Permissions** checkbox must be checked for the permissions in this tab to be enforced. You are able to enter as many rows as desired, by clicking **Insert document level permissions**. Clicking this will insert a new row where you will need to enter a name (any identifier of your choosing) and the xpath where the xml document stores the role information. Then, for each of these rows, you will be able to grant the following permissions: **Read, Write, L-Read, L-Write** and **Del**.

An example is shown below. In the form, a field will contain the user alias of the **Approver**, who will in turn be granted permission to read, write, lock and delete. Meanwhile, the **Auditor** will only be granted read access. Of course, this assumes that you have designed your form such that it contains these two pieces of information. This allows for fine grained control, as well as dynamic permissions, for instance, allowing the Approver to change the Auditor responsible for the document.

DATABASE ACCELERATOR Administration Tool

Document Type: QdNotification

Save Save As... Catalog

General Database **Permissions** Promoted Properties Documents Taxonomy Tree

☒ Enforce Permissions

Document Type Level Permissions

At least one role must be given Admin permission at the document type level. Otherwise a global DBXL admin is required to edit the document type. Only one user should be configured per row. Do not list users delimited with semicolons.

Name	Role Name	Add	Read	Write	L-Read	L-Write	Del	Admin
☐ Insert document type level permissions								

Document Level Permissions

Name	Membership XPath	Read	Write	L-Read	L-Write	Del
Approver	/my:myFields/my:DocumentApprover	☒	☒	☒	☒	☒
Auditor	/my:myFields/my:Auditor	☒	☐	☐	☐	☐

☒ Insert document level permissions

Note the following:

- Checking the Write checkbox will check the Read and L-Write checkboxes.
- L-Read Permissions are not currently in use and are reserved for future use.
- Only one user or group can be added per row. Do not insert lists separated by commas, semicolons or other delimiters.
- If you modify Document Level Permissions after creating documents, you must reshred the documents in order to apply the new permissions to the previously-existing documents.

ASSIGN DOCUMENT-LEVEL PERMISSIONS TO MORE THAN ONE USER



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In order to use document level permissions to grant rights on a document, we provide the DBXL Administration Tool (DAT) an xpath in our form template. This xpath will contain a user alias, which will then be granted the permissions that are checked. For an example, see the screenshot below.

Document Level Permissions						
Name	Membership XPath	Read	Write	L-Read	L-Write	Del
creator	/my:myFields/my:author	☒	☒	☐	☒	☐

If you wanted to grant permission to multiple people, no change is necessary in DAT itself, but rather in your form template. Let's assume that this is your form template:

The screenshot shows a form template with a title bar 'Repeating Doc Level permissions'. Below the title bar are three input fields labeled 'Name', 'Author', and 'Description'. A 'Submit' button is located at the bottom left. On the right side, there is a 'Data Source' panel. It shows a tree structure with a folder 'myFields' containing three items: 'name', 'description', and 'author'. The 'Main' data source is selected.

1. Double click on the author node (which is the xpath used in the DAT permissions) and mark it as repeating.
2. This will unbind your Author field. Remove the unbound field from the view. Right click on the author node in the data source and select Repeating Table. This will enter a repeating table into your view.

Your form now looks like this:



Repeating Doc Level permissions

Name

Author

☒ Repeating Table

Description

Data Source

Design Tasks

Data source:

Main

myFields

- name
- description
- author

Now you can enter multiple Authors into the repeating control. All of the user aliases in that repeating node will be granted Document Level permissions.



COMBINING PERMISSIONS

You can combine Document Type Level and Document Level permissions as desired. One common scenario is illustrated below:

1. You grant everyone Add permissions at the Document Type Level. This is accomplished by the setup seen in the screenshot below.

Name	Role Name	Add
Everyone	NT AUTHORITY\Authenticated Users	☒

2. The form contains a field called **my:SubmittedBy**, which is auto-populated with the submitter's alias when the form is submitted.
3. The submitter is granted Document Level permissions, so that s/he can Read the forms that s/he has submitted.

Document Level Permissions						
Name	Membership XPath	Read	Write	L-Read	L-Write	Del
Submitter	my:SubmittedBy	☒	☐	☐	☐	☐

4. We add another Document Type Level permission. This time, we grant an Admin group permission to read and write all documents. (You could also check the Admin checkbox for this group.)
5. Finally, we add another Document Level permission for a Reviewers group. This means that the user alias entered into this field is granted Read permissions.

Document Level Permissions						
Name	Membership XPath	Read	Write	L-Read	L-Write	Del
Submitter	my:SubmittedBy	☒	☐	☐	☐	☐
Approver	my:Reviewer	☒	☐	☐	☐	☐

Result:



- Everyone can add
- The Submitter can read his or her own xml documents.
- The Admins can Read and Write all xml documents.
- The Approvers can read the xml documents assigned to them.

As you can see from the above example, Document Type and Document Level permissions can be combined to customize your solution as desired.

SUPPORT

If you have questions about the information in this document, please contact us for assistance.

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