Documents’ visibility

In order to change the visibility of a given document, can be changed by using the highlighted button from the EDMS user interface:

Documents visibility - Access Levels

Based on CERN's official access rights policies, EDMS provides the following set of access levels for documents:

- **Sensitive**: Document accessible to group members + share. Hidden from everyone else, the document will not be displayed in the search result.

- **Restricted access**: Document accessible to group members only + share. The document will be displayed in the search results. People that are not part of its access group are not allowed to see its content.

- **CERN Internal**: Document accessible to CERN account holders.

- **Public access**: Document accessible to everyone.
Access Levels - Options availability

The list of possible choices is depending from the configuration of the Document’s Context. In particular, **Read Access for Collaboration, Public Allowed** option for each combination of document type/Release Procedure and **Sensitive Context** option setup by your EDMS local administrator play an important role.

In order to understand the logic, please have a look at the following diagram:

*Read Access for Collaboration rules can be setup for a specific combination of Release Procedure/Document status
**If allowed in the Context for a given combination of Document Type/Release Procedure

Options availability - Use cases

In the following chapters we will consider different use cases in order to better understand how EDMS manages the visibility options.
Use case 1 - Not Sensitive context without Read Access for Collaboration

For this use case we consider a document:

- With **NOT Sensitive** context.
- With **Public NOT Allowed** on a given Doc. Type/Release Procedure combination (Minute/DOC-OWNER).
- **Without Read Access for Collaboration** rules.

According to the diagram described above, we are in the following use case:

**Since the Public visibility is not allowed** for the Doc. Type/Release Procedure combination (Minute/DOC-OWNER), the only available options are **Sensitive**, **CERN Internal** and **Restricted** (this option is currently set so that it’s not displayed it in the menu):

When the status evolves to Released, the **Sensitive visibility stays** since **Read Access for Collaboration** rules are **not defined**. However, it’s possible to change the visibility after the document release.

The “**Public**” visibility is **not available** since the Doc. Type/Release Procedure combination (Minute/DOC-OWNER) used for this use case is configured to “**Public NOT Allowed**”.

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Use case 2 - Not Sensitive context with Read Access for Collaboration

For this use case we consider a document:
- **With NOT sensitive** context (Restricted).
- **With Public Allowed** on a given Doc. Type/Release Procedure combination (Report/DOC-OWNER).
- **With the following Read Access for Collaboration** rule:

According to the diagram described above, we are in the following use cases:

- Document in “In Work” status
- Document in “Released” status

When the document is in “In Work” status all options available and we can switch between all access levels:

As soon as the document is released, the CERN Internal visibility is setup due to the Read Access for Collaboration rule. If we want to switch the access level now, we are only able to increase the document visibility to Public.
Use case 3 - Sensitive context with Read Access for Collaboration

For this use case we consider a document:

- With Sensitive context
- With Public Allowed on a given Doc. Type/Release Procedure combination (Procedure/CMS-DOC-B)
- With the following Read Access for Collaboration rules:

According to the diagram described above, we are in the following use cases:

- Document in “In Work” status
- Document in “Under Approval” status
- Document in “Released” status

Due the configuration of this Context (Sensitive), it is possible to switch the document’s visibility between Public, CERN Internal and Sensitive:

When the status of the document evolves to Released, the Read Access for Collaboration rule is applied. Since the rule is configured to open the visibility to the “World” when the document is released, it’s not possible to set a different visibility and the button is greyed out: