Department Administration

Best Practices

Version: Foundation 22.2

Written by: Documentation Team, R&D
Date: June 2023

Documentation Notice

Table of Contents

What is Department Administration?

Department administration allows you to administer multiple departments on a single Perceptive Content instance as if each department exists as a separate instance of Perceptive Content, which allows greater security and specificity for your organization. Departments provide the capability to separate the configurable components of Perceptive Content into logical business areas based on individual departments within your company or geographic locations.

Users who have at least one management privilege can access one department at a time in Management Console. Every setting or feature you modify in Management Console applies to the selected department only.

Getting started

You can create a department that conveniently pertains to a particular section of your business with no content overlapping with other departments in your business. This setup keeps the department information secure from users in other departments. Departments are an effective way to give administrators access to every feature in Perceptive Content without giving those administrators access to information and features applicable to other departments in your business.

The installation or upgrade automatically establishes a default department in which to work. After the installation, you can create additional departments based on logical business areas within your company. We recommend that you work in these additional departments and avoid using the default department to ensure that every department is free from external dependencies. The following sections contain information you should consider when configuring additional departments in your system.

About manager roles

Two types of manager roles are available: Perceptive Manager and Department Manager.

Note When upgrading environments, existing owner or manager users are granted both Perceptive Manager and Department Manager roles. We recommend adjusting these settings so that each user is assigned only one manager role.

In addition, we recommend that you set up all manager users with both a manager account and a non-manager user account in the system, to encourage role separation in your organization. When performing tasks that can only be done as a manager, manager users should use their Perceptive or Department Manager account. When a manager is acting in the capacity of a standard user, the manager user should switch to their standard user account.

Perceptive Manager

A Perceptive Manager is a specialized type of user who can perform the following tasks.

- Create other users
- Assign Global privileges to other users
- Create departments
- Create and modify department labels
- Promote other users to the Department Manager role

- Create migration profiles
- Import or export migration packages
- Assign licenses and set up license groups

While the Perceptive Manager has the ability to manage every option available in the Cross Department Settings, the Perceptive Manager requires individual management privileges to perform actions in a department view in Management Console. For example, to create a document type, a Perceptive Manager requires the document type creation privilege. Users are promoted to the Perceptive Manager role during installation or upgrade. After installation, a Perceptive Manager can promote or demote other users with an INTool command.

Note When a user with the owner or manager role becomes a Perceptive Manager as a result of the upgrade to version Foundation EP1, the user gains access to nearly all privileges in the system. When you demote a Perceptive Manager, that user only loses the manager privileges in the global privilege category, while the other global privileges assigned during upgrade remain active. Therefore, if you demote a Perceptive Manager after upgrade, you may need to manually disable several privileges assigned to the user.

Department Manager

A Department Manager role allows you to perform any administrative action within your department. In addition, Department Managers are the only users who can share objects in their department with other departments. You can be a Department Manager for any number of departments, and you can have multiple Department Managers for a single department in the system.

Note Only a Perceptive Manager can promote a user to the Department Manager role.

Set up departments

Installation automatically establishes a default department in which to work. Department security is recommended for customers who have multiple departments that need to keep their content secure.

To begin using department security, the Perceptive Manager must first set up the departments within the system. For best results, complete the following sequence of procedures. You perform each procedure in the Cross Department Settings in Management Console.

- Assign department name, description, and department label
- Create users
- Promote at least one user to department manager for each department
- Set up license groups
- Set up sharing
- Set up user groups and privileges

Assign department names and descriptions

When you create a department, you must first assign a unique name. This name should reflect the name of your business department, team, or global area. You can also create a department description.

You can modify both the department name and description fields at any time.

Define a department label

Department labels assist with keeping all content type names unique across all departments. The department label automatically appears at the start of every naming field for a new item created in the department view in Management Console.

For example, if you want every future document type created in your department to have the department label “Sales –” in its name by default, in the Department Label field, enter “Sales”.

We recommend that you do not include department labels in Custom Property names, to avoid stretching the Properties pane in the viewer to account for the longer names. Instead, share Custom Properties with all other departments.

Create users

Users exist in the global Perceptive Content system, and are not specific to any one department. You can assign users to groups that are specific to a department.

Set up license groups

We recommend setting up one license group per department, and then allocating the minimum number of licenses the department requires to operate. We also recommend that you leave some licenses available in the unassigned license pool to serve as overflow for all license groups.

Transfer items to other departments

If you implement department administration for your system, we recommend that you transfer all items created in Management Console from the Default department into the appropriate departments.

There are two steps to the transfer process. The department manager of the originating department creates a transfer profile outlining every item that they want to permanently transfer into the destination department. When the deparment manager of the originating department executes the transfer, Management Console creates a transfer package at that time.

The department manager of the destination department then imports the transfer package. We recommend that you perform both the export and the import during non-peak business hours.

Transfer considerations

Every item you transfer to another department gets shared back to the source department to prevent breaking changes in the source department.For example, when Department Manager A transfers Group A from Department A to Department B, after Department Manager B receives the resulting transfer package, Department B contains Group A, and Group A is automatically shared with Department A.

You cannot transfer to multiple departments with the same operation.

Perceptive Managers have no ability to transfer or receive department items. This operation is conducted solely between two Department Managers.

When you transfer a Document Type, Document Type List, Folder Type, Folder Type List, Record Type, or Record Folder Type to another department, any custom properties associated with one of those department items will be shared to the destination department. For example, when Department Manager A transfers Document Type A from Department A to Department B, and Custom Property A is associated with Document Type A, the following three results occur.

- Document Type A is transferred to Department B.
- Document Type A is shared back to Department A.
- Custom Property A is shared to Department B.

After a Document Type, Document Type List, Folder Type, Folder Type List, Record Type, or Record Folder Type has been transferred to another department, you cannot transfer it to another department.

Set up sharing

As a Department Manager, you can share any item created in Management Console with other departments.

We recommend sharing custom properties with all other departments to keep important information consistent and available in all departments.

If you want to allow other departments to access items created in your department, we recommend that you share the items rather than transfer the items.

Sharing considerations

You can reference items shared from another department when configuring settings in your own department, but you cannot configure the shared items or view any detailed information for the items.

For example, if a drawer has been shared with your department, when you configure an application plan, the shared drawer will appear in the list of destination drawers for the application plan, but the shared drawer will not appear in the list of drawers in the Drawers pane of Management Console.

When you share a document type, document type list, folder type, folder type list, record type, or record folder type with another department, users can view and map all of the custom properties associated with the record folder type, including custom properties that have not been shared with your department, in the Application Plan Designer.

Because you cannot unshare an item once it is shared, you should carefully consider the items you share with other departments. However, you can delete a shared item if you remove all references to the shared item in other departments.

Set up privileges

Privileges limit user access to certain views and functionalities within the system. You can assign privileges at the user or group level. Privileges assigned to a user have higher priority than privileges assigned to a group. Users and groups can assign privileges per privilege category, both at the global level and department level.

Perceptive Managers are the only users who can assign every global privilege to users and groups. Global privileges grant capabilities that are not scoped to any department. A Department Manager sets up department-level privileges, such as drawer and record privileges.

You can grant non-managers the ability to assign various categories of privileges to users and groups.

About the All Users group

If you upgraded to Perceptive Content Foundation EP1, we recommend that you disable the All Users group when you work with multiple departments. The All Users group no longer automatically includes every user in the system. After the upgrade, the All Users group becomes a standard group in the Default department that includes every user in the system at the time of upgrade.

You can, however, define an audit template that applies to all users in the system.