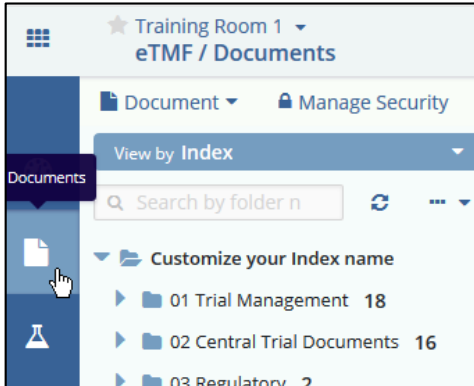


Applicable to:  Administrators  eTMF

The purpose of this job aid is to limit the view of a user or group to only see select folders. Changing security settings for a Group (e.g. CRAs) is a best practice recommendation rather than changing individual (e.g. John Doe) user settings



By default, users will see all file index folders until Manage Security is applied (or unless the initial room configurations included security settings)

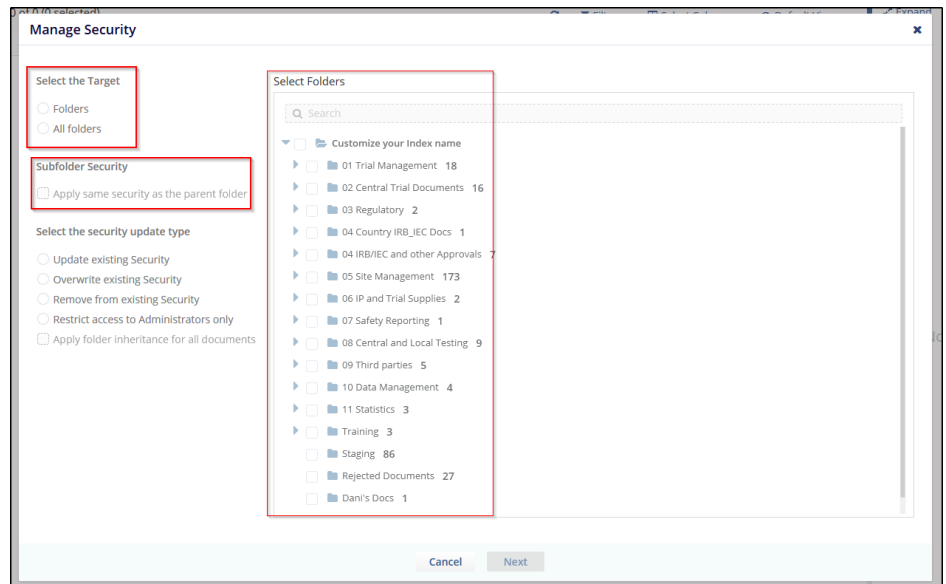
1. Enter a room and navigate to the **Documents** module

2. Above the grid, click **Manage Security**



3. Choose the target folders to manage

If **Folders** is selected, decide if Subfolder Security will be the same and select the specific folder(s) to update



## 4. Choose to **update** or **overwrite** security



Update is often a better choice so that other existing folder security is not removed

### Select the security update type

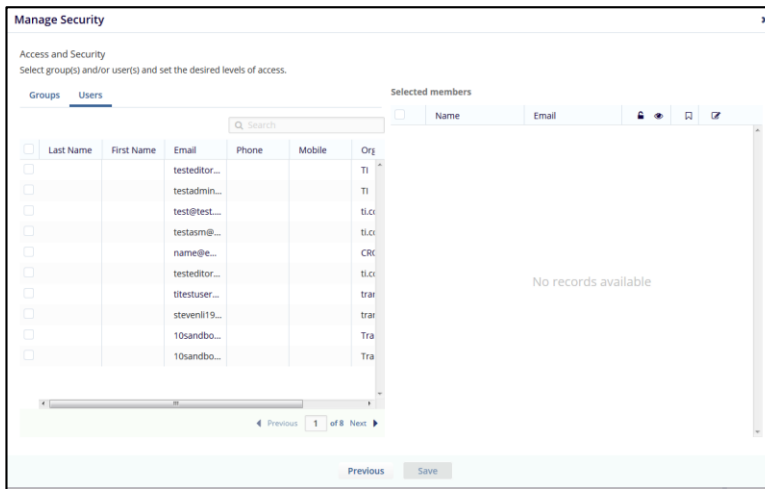
- Update existing Security
- Overwrite existing Security
- Remove from existing Security
- Restrict access to Administrators only

## 5. Click Next

Cancel

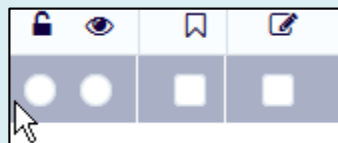
Next

## 6. Find the users to manage from **Groups** and/or **Users**



## 7. Double-click the user name(s) in the left panel or drag it into the right panel

## 8. Do NOT check any boxes



Leaving the boxes blank will prevent these users (or group) from accessing the folder(s)

Previous

Save

## 9. Click **Save**



When applying security, the **Everyone** group settings **cannot** also be applied to the same folder

**For any additional assistance, click ...**

