

## Manage Security: How to Restrict Folder Access

Applicable to: Administrators

eTMF

- 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.	Manage Security		x
Choose	Select the Target	Select Folders	
the	Folders     All folders	Q. Search	
target	Subfolder Security	Be Index     Im 01 Trial Management 1	
folders	Apply same security as the parent folder	Ibi Country 0     Ibi Country 1     Ibi Country 0     Ibi 02 Central Trial Documents 0	
to	Select the security update type O Update existing Security	Im 03 Regulatory 0     Im 04 (R8 or IEC and other Approvals 0	
manage.	Overwrite existing Security Remove from existing Security Restrict access to Administrators only Apply folder inheritance for all documents	Bu 05 Site Management 0     Bu 06 IP and Trial Supplier 0.     Bu 07 Safety Reporting 0     Bu 08 Central and Local Testing 0     Bu 09 Third parties 0     Bu 10 Data Management 0     Bu 11 Statistics 0     Bu 11 Statistics 0     Bu Stateine 33	
		Show Empty Folders Cancel Next	

If Folders is selected, decide if Subfolder Security will be the same as the parent folder.

## T R I A L INTERACTIVE

SCIENCES

LIFE

## Manage Security: How to Restrict Folder Access

Select the security update type 4. Choose to Update or Overwrite existing security settings. Update existing Security Overwrite existing Security Remove from existing Security Restrict access to Administrators only Apply folder inheritance for all documents Update is often a better choice so that other existing folder security is not removed. 5. Click Next. Next Cancel Manage Security cress and Security 6. Find the 7. Double-click users to the user manage name(s) in the 2-Step Workflow - OC 1 2-Step Workflow - QC 2 left panel or from Groups drag it into the try India Editor and/or ntry India Readers right panel. orth Macedonia\_Edit ry North Macedonia Read Users. 8. Do NOT check any boxes. Leaving the boxes blank will prevent these Selected members users or groups from accessing the folders. Name Email ۲ Ø TIReader103@ti.com Reader 103 Reader 102 TIReader102@ti.com 9. Click Save. Previous Save For any additional assistance, click ... Help 🖻 Guide