

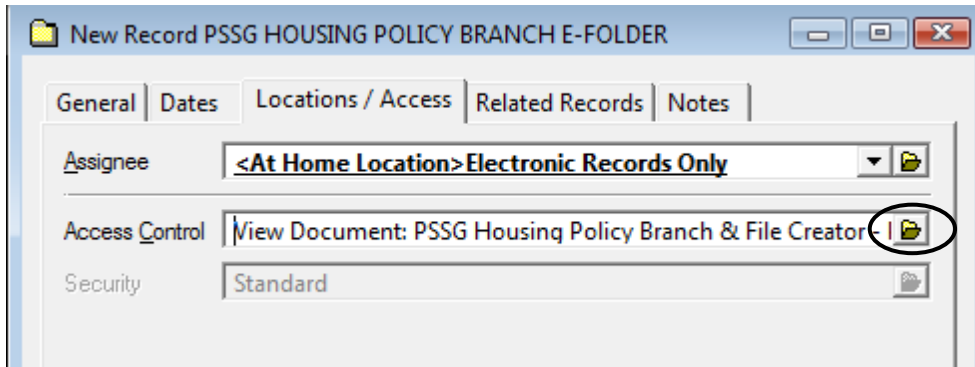
TRIM Quick Reference

Housing Policy Branch - Applying Stricter Access Controls to E-folders

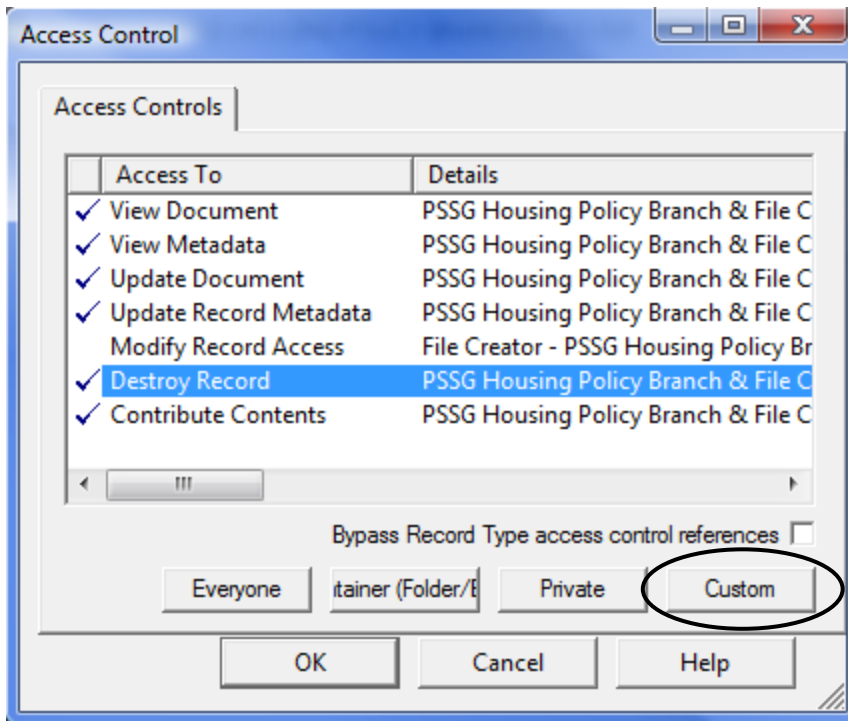
Follow these instructions to restrict access to HPB folders.

When Creating an E-Folder for HPB Personnel files

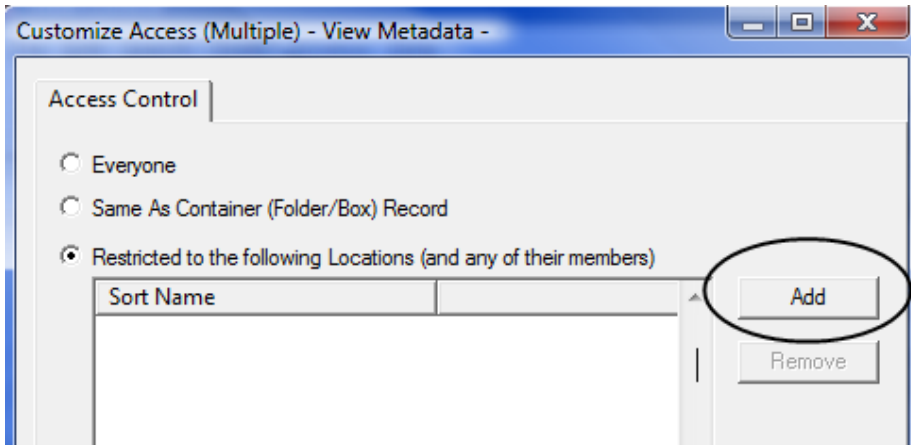
1. In **Locations/Access** tab, click on Kwikselect button beside Access Control:




2. Tag **View Document, View Metadata, Update Document, Update Record Metadata, Destroy Record and Contribute Contents**. Click on **Custom**.

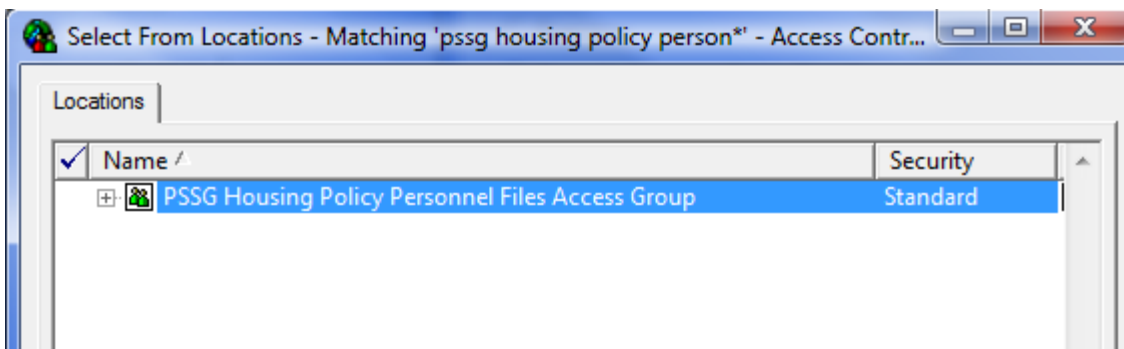


3. Choose **Restricted to following locations**, highlight your name and click on the **Remove** button. Then click on the **Add** button.

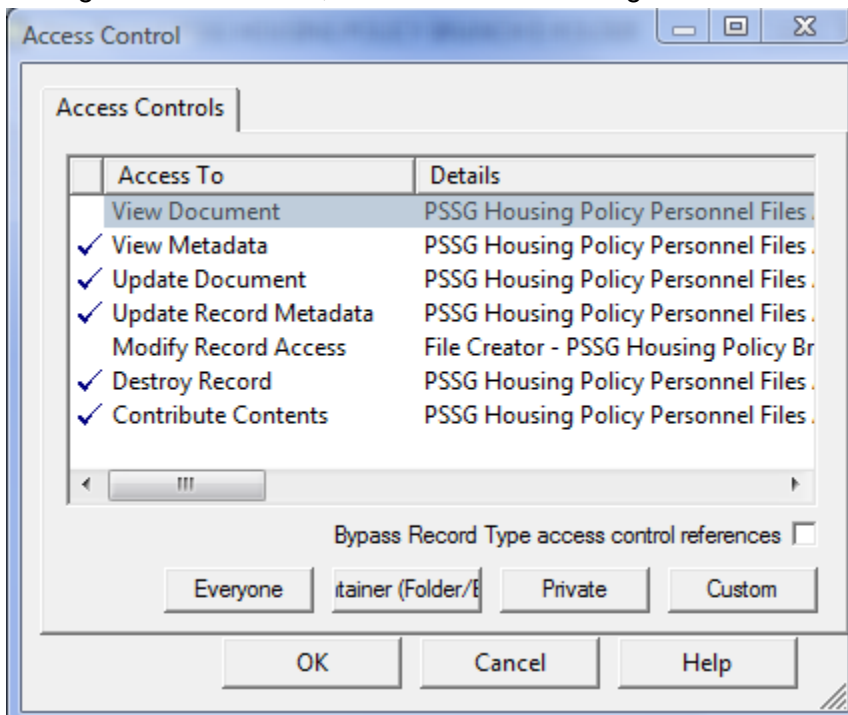


4. Type in **PSSG Housing Policy Personnel Access Group**, highlight and click **OK**. Click **OK** again to return to the Locations/Access tab.

HINT: To see who is in the PSSG Housing Policy Personnel Access Group, click on the  beside the location name.



5. Un-tag **View Document**, and click on Custom again.



- Select **Restricted to the following Locations** again, and then click the **Add** button. This time search for **File Creator – PSSG Housing Policy Branch**, highlight, click **OK**, and **OK** again to return to the **Access Controls** screen.

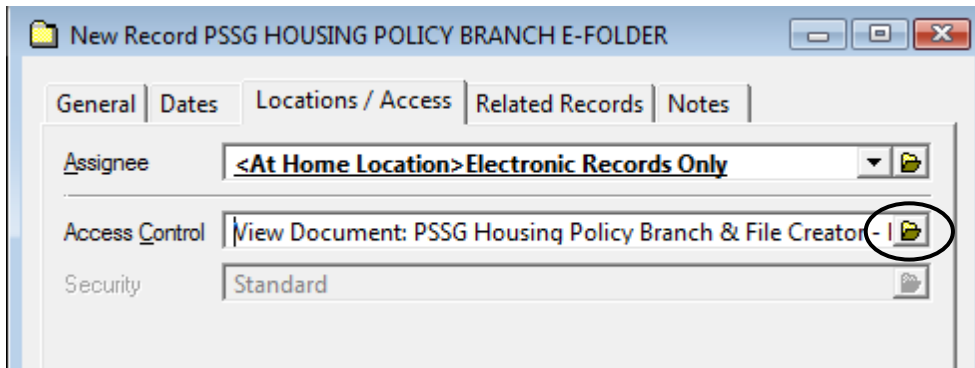
Access Controls

Access To	Details
View Document	PSSG Housing Policy Personnel Files Access Group PSSG Housing Policy Branch & File Creator - PSSG Housing Pol
✓ View Metadata	PSSG Housing Policy Personnel Files Access Group & File Creator - PSSG Housing Policy Branch PSSG Housing Pol
✓ Update Document	PSSG Housing Policy Personnel Files Access Group & File Creator - PSSG Housing Policy Branch PSSG Housing Pol
✓ Update Record Metadata	PSSG Housing Policy Personnel Files Access Group & File Creator - PSSG Housing Policy Branch PSSG Housing Pol
Modify Record Access	File Creator - PSSG Housing Policy Branch (based on Record Type 'PSSG HOUSING POLICY BRANCH P-FOLDER')
✓ Destroy Record	PSSG Housing Policy Personnel Files Access Group & File Creator - PSSG Housing Policy Branch PSSG Housing Pol
✓ Contribute Contents	PSSG Housing Policy Personnel Files Access Group & File Creator - PSSG Housing Policy Branch PSSG Housing Pol

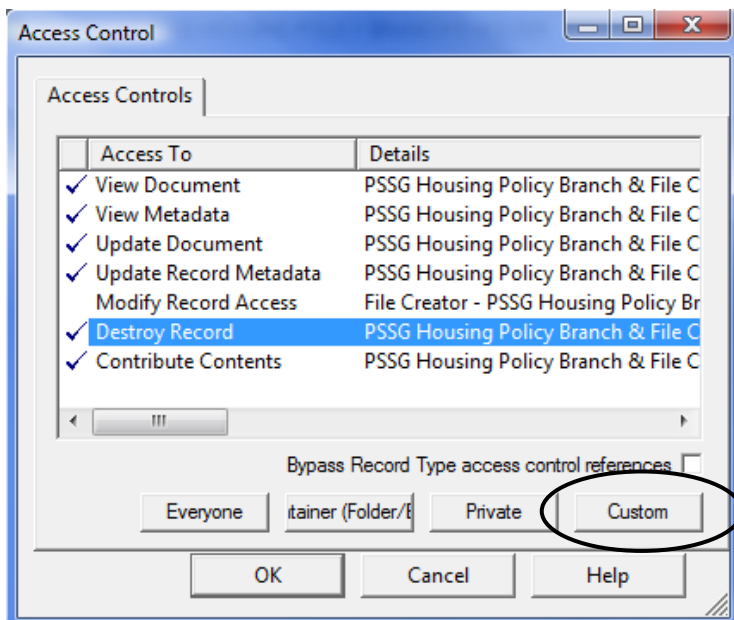
- Click OK to save access controls.
- Review other fields on the New Record form and press OK when complete.

When Creating an E-Folder for HPB Executive files

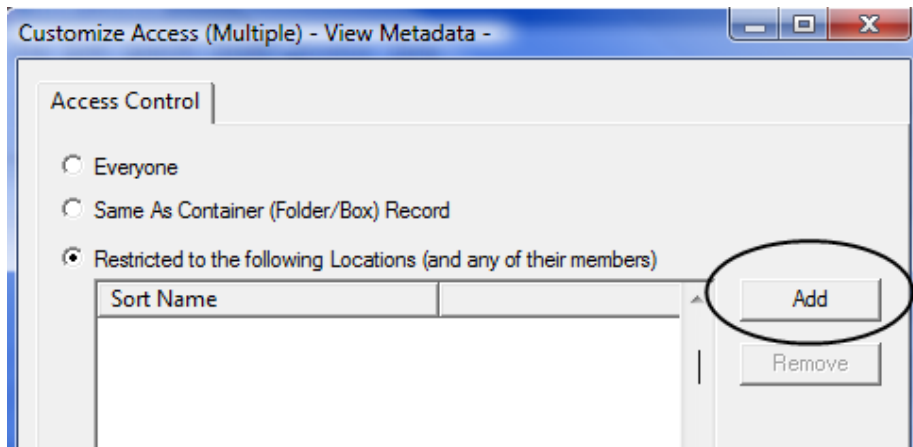
- In **Locations/Access** tab, click on Kwikselect button beside Access Control:



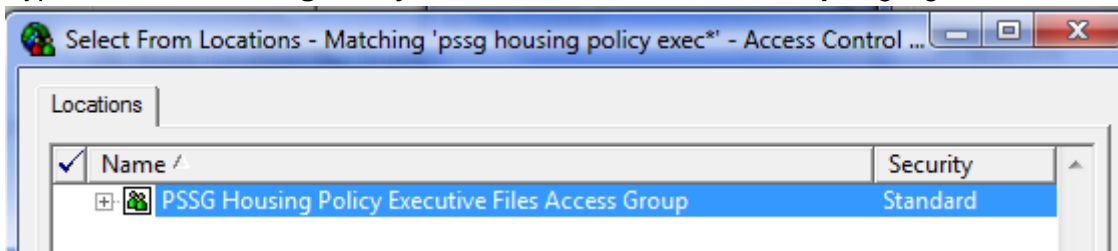
- Tag **View Document, View Metadata, Update Document, Update Record Metadata, Destroy Record** and **Contribute Contents**. Click on **Custom**.



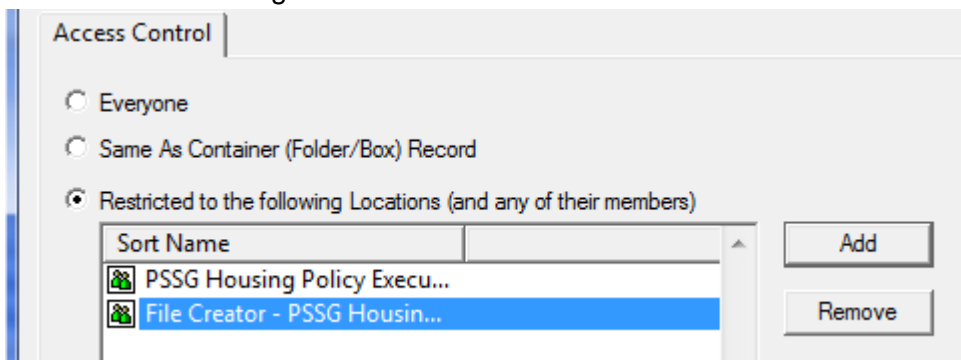
- Choose **Restricted to following locations**, highlight your name and click on the **Remove** button. Then click on the **Add** button.



- Type in **PSSG Housing Policy Executive Files Access Group**, highlight and click **OK**.



- Click on Add again, and this time search for **File Creator – PSSG Housing Policy Branch**. Highlight and click **OK**. Click **OK** again to return to the **Access Control** screen.



- Click **OK** to save access controls.

Access To	Details
<input checked="" type="checkbox"/> View Document	PSSG Housing Policy Executive Files Access Group & File Creator - PSSG Housing Policy Branch PSSG Housing Poli
<input checked="" type="checkbox"/> View Metadata	PSSG Housing Policy Executive Files Access Group & File Creator - PSSG Housing Policy Branch PSSG Housing Poli
<input checked="" type="checkbox"/> Update Document	PSSG Housing Policy Executive Files Access Group & File Creator - PSSG Housing Policy Branch PSSG Housing Poli
<input checked="" type="checkbox"/> Update Record Metadata	PSSG Housing Policy Executive Files Access Group & File Creator - PSSG Housing Policy Branch PSSG Housing Poli
<input type="checkbox"/> Modify Record Access	File Creator - PSSG Housing Policy Branch (based on Record Type 'PSSG HOUSING POLICY BRANCH E-FOLDER')
<input checked="" type="checkbox"/> Destroy Record	PSSG Housing Policy Executive Files Access Group & File Creator - PSSG Housing Policy Branch PSSG Housing Poli
<input checked="" type="checkbox"/> Contribute Contents	PSSG Housing Policy Executive Files Access Group & File Creator - PSSG Housing Policy Branch PSSG Housing Poli

- Review other fields on the New Record form and press **OK** when complete.