

# FileGenius 4.0, Phase 3 Changes Guide FileGenius®

This document will provide you with information on the changes that have been incorporated into the latest version of FileGenius (4.0, Phase 3).

**IMPORTANT:** Upon logging in for the first time, please click the “Refresh” or “Reload” button on your browser to make sure you’re seeing the new changes.

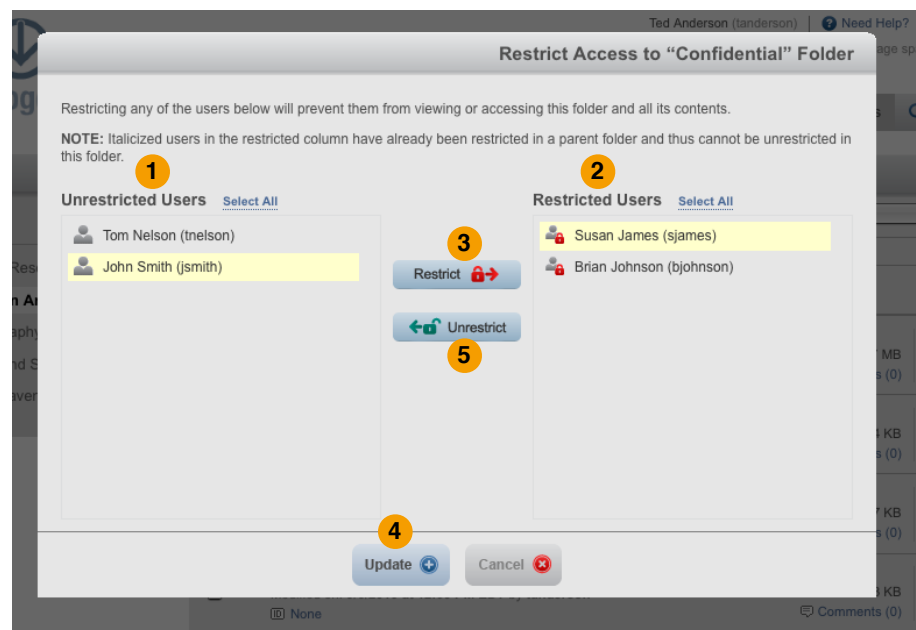
Numbers in orange circles correspond to the user interface screens shown in the document.

## Restricted Folders

This Phase 3 release of FileGenius allows for the creation of restricted folders. This new feature gives admins and sub-admins the ability to restrict particular users from seeing and accessing one or more folders within a workspace. This feature works by exclusion; the admin/sub-admin selects which users should be denied — excluded — from having access to a particular folder, and not by granting permission to all other users who should have access.

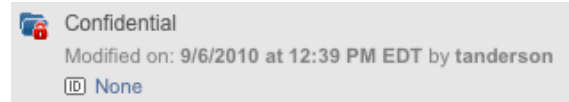
To use restricted folders, log in as an admin or sub-admin, choose the actions menu to the right of the folder you want to restrict and select “Restrict”. A shadowbox window will appear with two columns. On the left are users assigned to this workspace who are unrestricted (have access to this folder). **1** On the right are any users who have already been restricted from this folder. **2** To restrict one or more users, simply click on their name(s) in the left column and click the Restrict button. **3** Their names will now appear in the right column indicating they will be restricted from this folder. To complete the transaction, you must click the Update button at the bottom. **4** Clicking the Cancel button will cancel the transaction without saving any of your changes.

To unrestrict users simply follow the same steps as above, but this time select their name(s) in the right column and click the Unrestrict button, **5** again being sure to click Update to save the changes. You can both restrict and unrestrict users in the same shadowbox session.



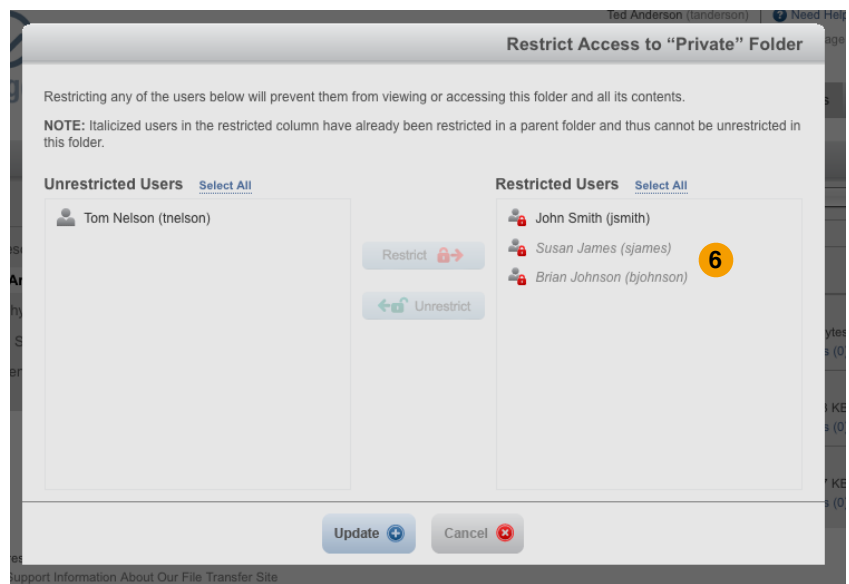
## Visual Indicators

If a folder is restricted, the admin and sub-admin will see a folder icon with a red lock indicating that folder has been restricted from one or more people. When a user is restricted from a folder, that folder will be completely hidden and not appear to them within the workspace. **Important:** please see Additional Notes below about these settings taking effect only after user logout.



## Parent/Child Folder Restrictions

If a user is restricted from a folder, they are automatically restricted from all folders within that one and cannot be unrestricted from a lower-level folder. When setting the restrictions for a sub-folder within a folder that has already been restricted, users that are currently restricted from a higher-level folder will have their names appear in italics in the right column, **6** indicating they cannot be unrestricted from that folder.



## Moving/Copying Restricted Folders

When a restricted folder is moved or copied from its current location to another, the restricted permissions applied to that folder remains with it. **Example:** Ted Anderson is restricted from the folder "Confidential". If that folder is moved or copied to another location within that workspace or to another workspace, Ted will still be restricted from that folder.

**NOTE:** If a restricted folder is moved or copied to another workspace where one or more of the restricted users do not belong, their name(s) will not appear in the restricted users list within the new workspace (since they do not belong to that workspace, their name cannot appear in the list). If, at a later date, that user is then added to that second workspace, they will be automatically restricted from that folder (and their name will appear in the restricted users list). So if an admin/sub-admin sees a restricted folder but there doesn't seem to be any restricted users, this indicates the folder was moved or copied from another workspace that had different users assigned to it.

## Additional Notes

- Folders in the Home workspace cannot be restricted.
- Admins and sub-admins cannot be restricted from folders.
- Users will still be able to see a folder they have been restricted from until they log out. Upon logging back in, the folder restrictions will be in effect.
- Only folders can be restricted, not individual files. Unrestricted users could potentially move or copy files out of a restricted folder, inadvertently granting access to files to a restricted user. Admins and sub-admins should alert users of a restricted folder not to move or copy files out of them without checking with the admin.

## Interface Updates

The following changes have been made to the FileGenius interface:

### Home Directory Removed for Non- Admins/Sub-admins

Regular users will no longer see a Home workspace with the message, “Choose a Workspace to begin browsing files.” Upon logging in they will automatically be shown the contents of the first workspace to which they belong.

### Email User from Actions Menu

Admins and sub-admins can now email a single user through the Control Panel --> Users --> Actions menu without having to use the Batch Email feature for a single user.

### Batch Actions Require Multiple Selections

The Batch action items will now only become active when two or more files are selected at one time. This was done to eliminate confusion as to which action method to use regarding a file or folder; one is not a batch.

### Move/Copy Interface Simplified

The move/copy shadowbox interface has been simplified, making any folders that exist in the Home workspace visible only after clicking on the Home workspace instead of displaying them alongside the other workspaces. **7**

