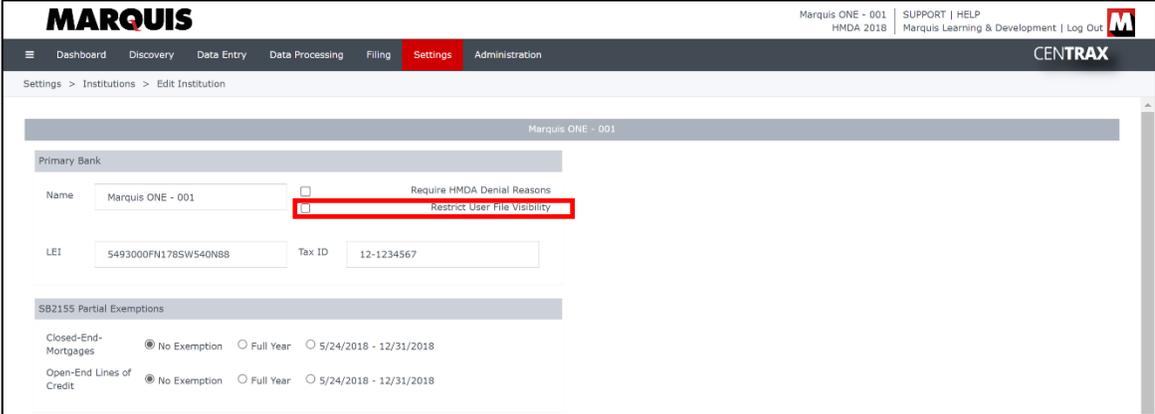
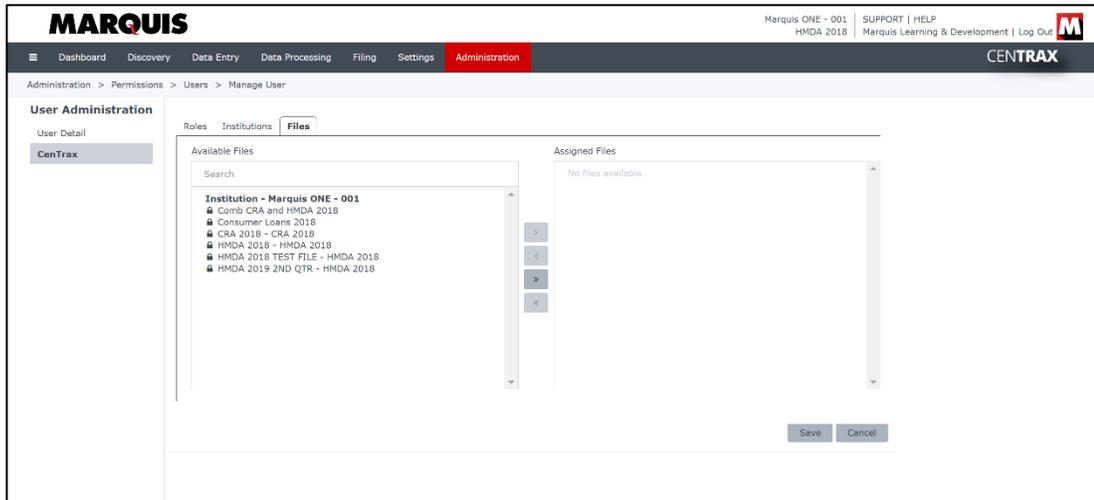


# MARQUIS

<b>CNX305</b>	<b>Restrict File Access</b>
	<p>Due to the ability to now restrict file access, users with Administrator access will be able to see all files, but non-administrator users will only see the files that they have been given access to see.</p> <p>For instance, an institution may have users who are working on different types of files, such as a dedicated HMDA individual working on a HMDA file, and a dedicated CRA individual working on a CRA file. This allows the HMDA individual to not have access to the CRA files and the CRA individual to not have access to the HMDA files.</p>
<b>Order of Steps</b>	<b>Tasks</b>
<b>Step 1</b>	Log into <b>CentTrax NEXT</b>
	The active <b>Institution</b> and <b>File</b> will display in the upper right-hand section to the left of the name of the user logged in.
<b>Step 2</b>	Navigate to Settings/Institutions, and click Edit for the desired institution where you will turn on the ability to restrict file access.
<b>Step 3</b>	Select the checkbox to Restrict User File Visibility.
	 <p>The screenshot shows the MARQUIS interface for editing an institution. The 'Restrict User File Visibility' checkbox is checked and highlighted with a red box. Other visible fields include 'Name: Marquis ONE - 001', 'LEI: 5493000FN178SW540N88', and 'Tax ID: 12-1234567'. There are also radio button options for 'SB2155 Partial Exemptions'.</p>
<b>Step 4</b>	Scroll down and click <b>Save</b> .
<b>Step 5</b>	Next, navigate to Admin/Permissions/Users and click edit for the desired user where you will restrict file access.
<b>Step 6</b>	Click the <b>Files</b> tab.
<b>Step 7</b>	Here, files which are available to users may be updated or changed. To move a file from the the available files column to the assigned files column, select the file and click the single arrow.

# MARQUIS



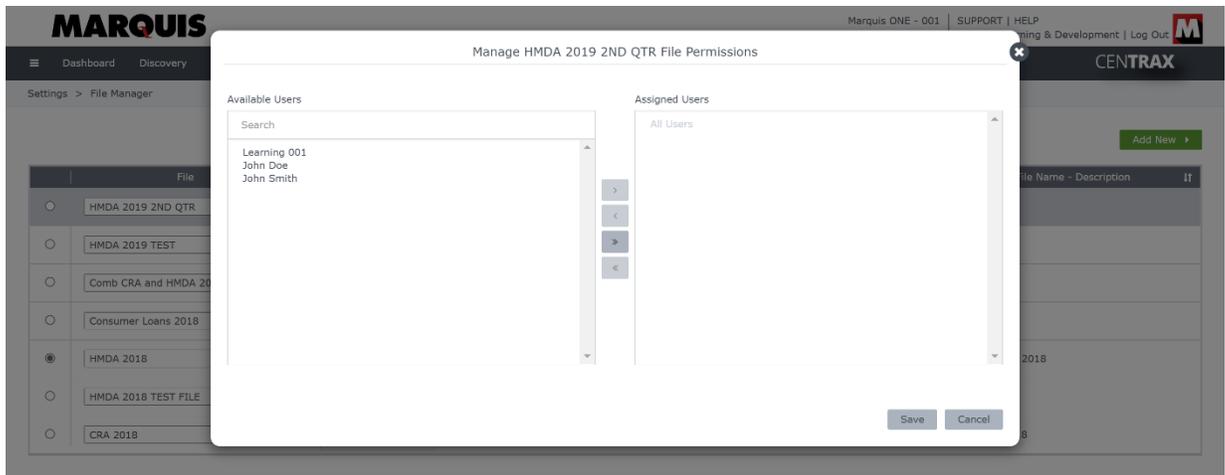
**Note: All files** may be moved from the Available Files column to the Assigned Files by clicking the double forward arrow.

**Step 8** To remove access, and therefore move a file from the Assigned Files to the Available Files, select the file and click the backward arrow.

**Step 9** Next, navigate to the File Manager. If the restrict access ability has been turned on, you'll see an additional column, Restrict Users, displayed as part of the grid.

**Step 10** To restrict access to specific users, click the people icon.

**Step 11** For any users you wish to restrict access, click the user's name from the Available Users column. Click the forward arrow to move the user to the Assigned User column. Users remaining in the **Available** Users column will not have access to the file.



**Note:** The lock icon displayed within the manage user area corresponds to the "Restrict File" column within the File Manager. If the file is restricted, the lock icon indicates that non-admins cannot access the file unless specifically added.

**Note 2:** Users will also only see the files which they can access, when clicking the list of available files from the upper-right hand corner of the screen.