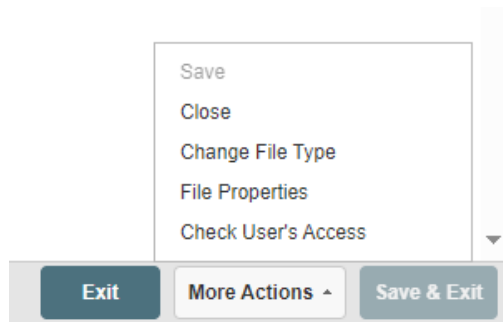


QUICK REFERENCE GUIDE

Actions you can complete under **File Properties** are to change file ownership or grant temporary access to another file manager,

Steps to change file ownership:

1. Select the **More Actions** box, in the lower right-hand corner from within the file.
2. Select **File Properties**.



3. The main file properties page will summarize in the **General** tab file history, for example who has modified the file or accessed it.
4. Click on the **Status/Ownership** tab to change the ownership of the file.

File Properties ?

General
Status/Ownership
Security

File State and Status

Current State: In-Progress

Current Status:

Status Description:

Primary/Duplicate: Primary

Ownership

Responsible Owner:

Current Owner: training10 account10

My Important Files

Mark as Important:

Reason:

Responsible Owner – Typically a manager whose goal it is to make sure that the file gets closed.

Current Owner – The user who is working the file at this moment. They are taking the steps necessary to close the file.

RL – File Properties

5. Click on the magnifying glass to open a search page titled **Select Users**. You can search using user ID (e.g. from email) or with partial name, job title or by department.
6. Click on **Search**.
7. Click on circle by the file manager from the search result and then on **OK**, or
8. Click on **Reset** if you do not find the individual and you want to complete another search.

Select Users ?

Please enter the user information you would like to search for:

UserID starts with:

- OR -

Name contains Title contains Dept. contains

Include: Active Users Inactive Users

[Search](#) | [Reset](#)

Search Result

User ID	Full Name	Title	Dept.
No Data			

[Cancel](#) [OK](#)

Steps to grant access for another file manager to complete a task, review only or to have all access to work on the file:

1. From the **Files Property** page, click on **Security** tab,
2. Click on **Add** under the **Granted Access**.

Granted Access

[Add](#) | [Modify](#) | [Delete](#)

<input type="checkbox"/>	User Name	Granted On	Granted By	End On	File Access
No Granted Access!					

3. Click on the plus sign to open the **Select Users** page to search for the individual as described in steps 5 to 8 above,

Tip – You can assign new ownership from the Info Center:

- Click on the box by the selected file
- Click on the **More** drop-down box
- Select **Change Owner**
- Enter 2 or more characters to search for the individual and click **Execute** to change ownership

QUESTIONS? Contact RL_Support@sharedhealthmb.ca