

Ask for a reason before records are opened

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You can ask everyone to say why before they open a record in any folder, not just protected ones. People choose from a short list, such as **Audit** or **Customer request**, and their reason appears in the ledger.

Before you start

You need permission to manage Folio settings. An admin in your organisation can give it to you.

1 Open Reasons for viewing

Go to **Settings** in Folio and choose **Reasons for viewing**.

2 Turn it on

Click **Turn on**, choose your own reason for the change and click **Turn it on**. From then on, everyone is asked why before they open a record.

3 Choose how long a reason lasts

Click **Change** next to **A reason lasts** and pick 5, 10, 15 or 20 minutes. Give a reason and click **Send for approval**, and it changes once a second administrator approves it.

What people see

When someone opens a record, Folio asks **Why are you opening this?**. They choose from **Audit**, **Regulatory request**, **Legal proceedings**, **Customer request**, **Internal review**, **Correction** or **Other**, and can add details. **Other** needs a few words, and **Legal proceedings** needs a matter reference.

Their reason covers that folder and everything in it until the time runs out, so they aren't asked again for each record.

Turning it off

Click **Turn off** and then **Send for approval**. It stays on until a second administrator approves, and protected folders keep asking either way.