

Protect a folder

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Protecting a folder means everyone gives a reason before opening a record in it, even if your organisation doesn't ask for one elsewhere. It suits HR files, client papers and anything else that should only be read for a good reason.

Before you start

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

1 Open Protected folders

Go to **Settings** in Folio, choose **Protected folders** and click **Protect a folder**.

2 Choose the folder

Pick the folder you want to protect. Any folders inside it are protected too, including ones made later.

3 Say why and save

Choose a reason, add a few words about why, and click **Protect it**. The folder now shows **PROTECTED** in **Files**.

What changes

Anyone opening a record in the folder is asked why first. Renaming the folder, or moving a record out of it, waits for a second administrator to approve.

Removing protection

Click **Ask to remove** next to the folder, give a reason and click **Send for approval**. Nothing changes until a second administrator approves it in **Approvals**.

If something goes wrong

The folder I want isn't in the list.

It may already be protected, or sit inside a protected folder, in which case it's covered already. Check the list under **Protected folders**, and if it isn't there, write to us at support@unforged.ai.