



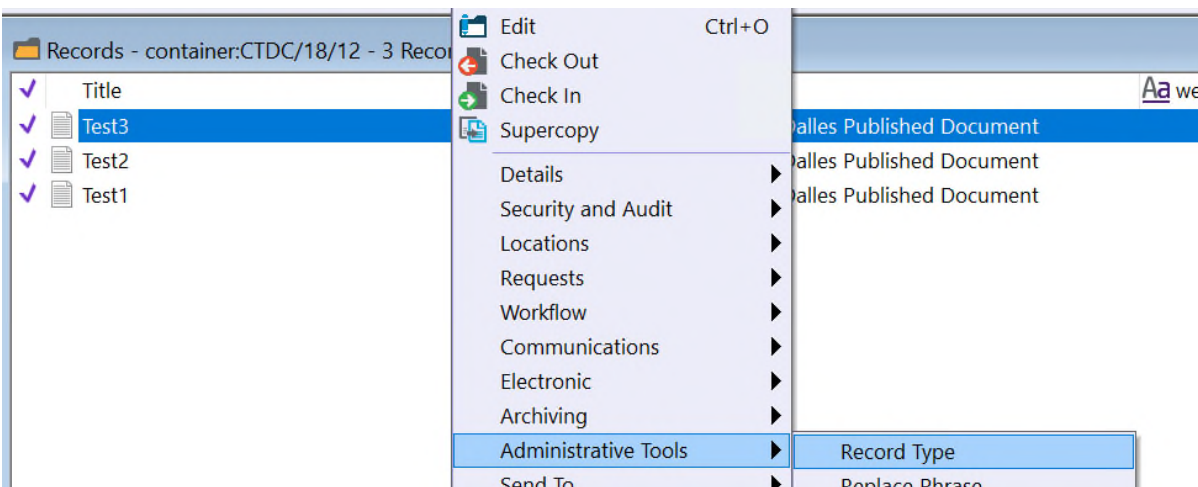
Changing the Document Record Type for Documents in Content Manager 9.3 – Published to Internal

Please note – this action can only be performed by Power Users.

Select the records for which you wish to **change the record type** by clicking in the blank space to their immediate left, as circled below (a process known as tagging):



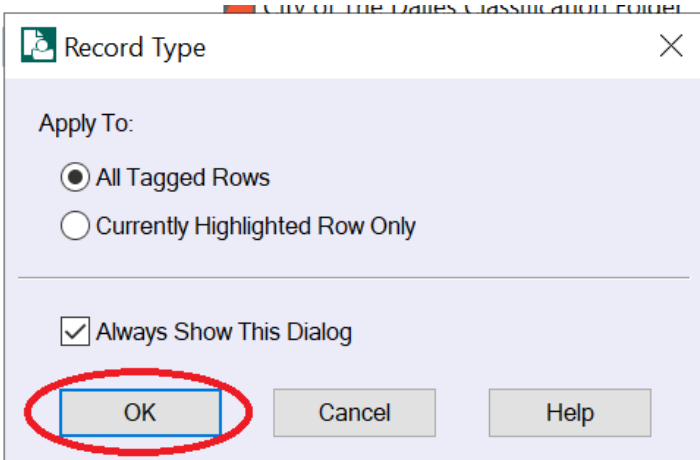
Right click on any of the tagged records and go to **Administrative Tools -> Record Type**:



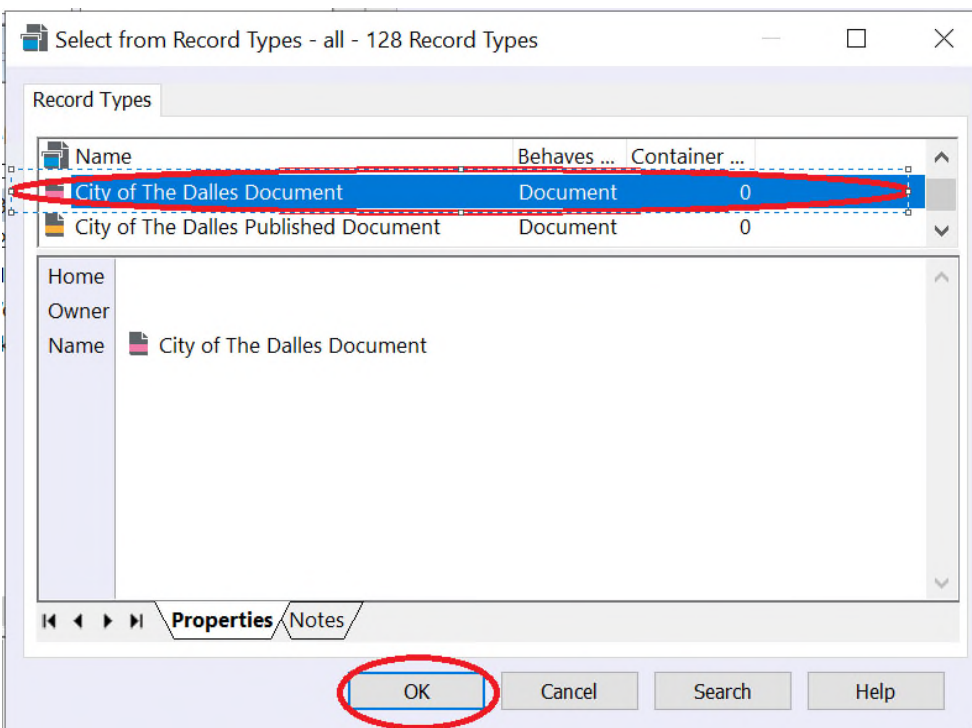


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Click **OK** to apply the forthcoming change to **All Tagged Rows**:



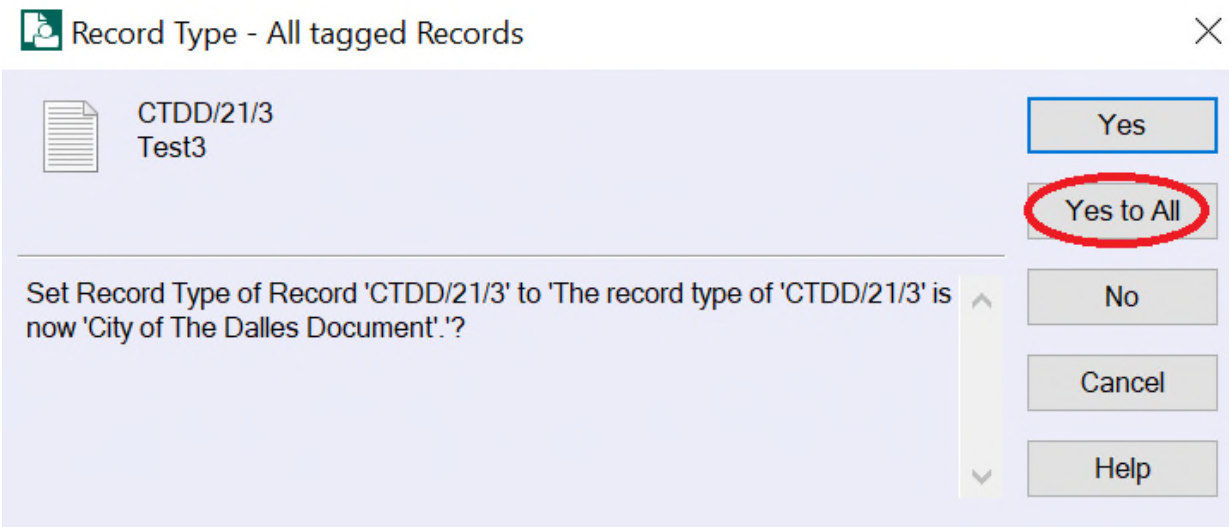
Select the **desired record type** and click **OK**:



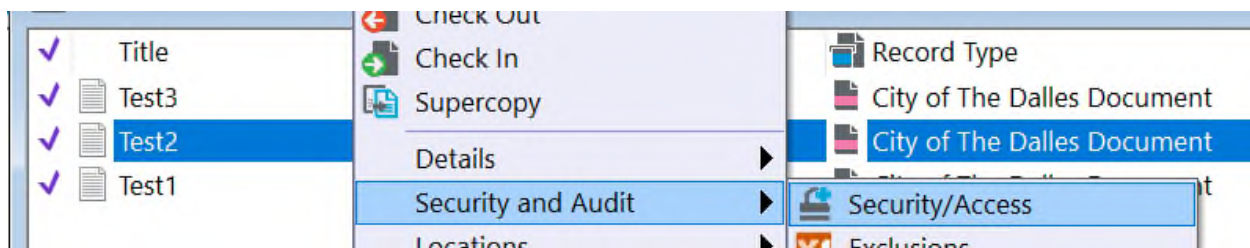


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In the resulting window, click “**Yes to All**” when asked whether you wish to change the record type of all the records you tagged. The record type has now been changed, but the security applied to the record has not (see next steps).



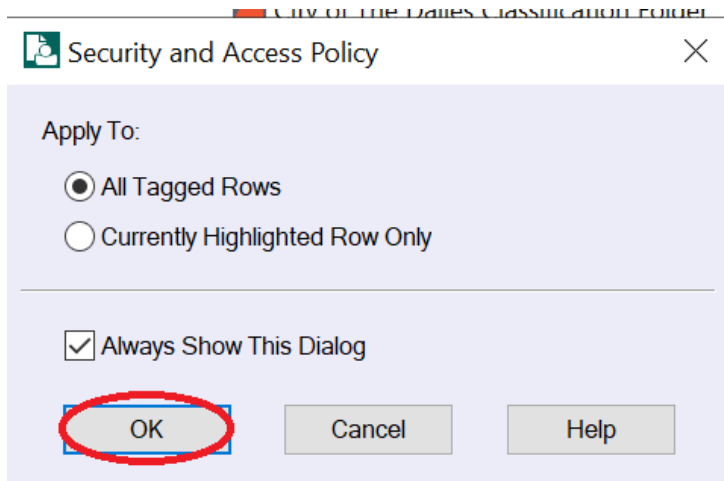
To change the security on the records in question, right click on one of the same tagged documents and select **Security and Audit -> Security/Access**:



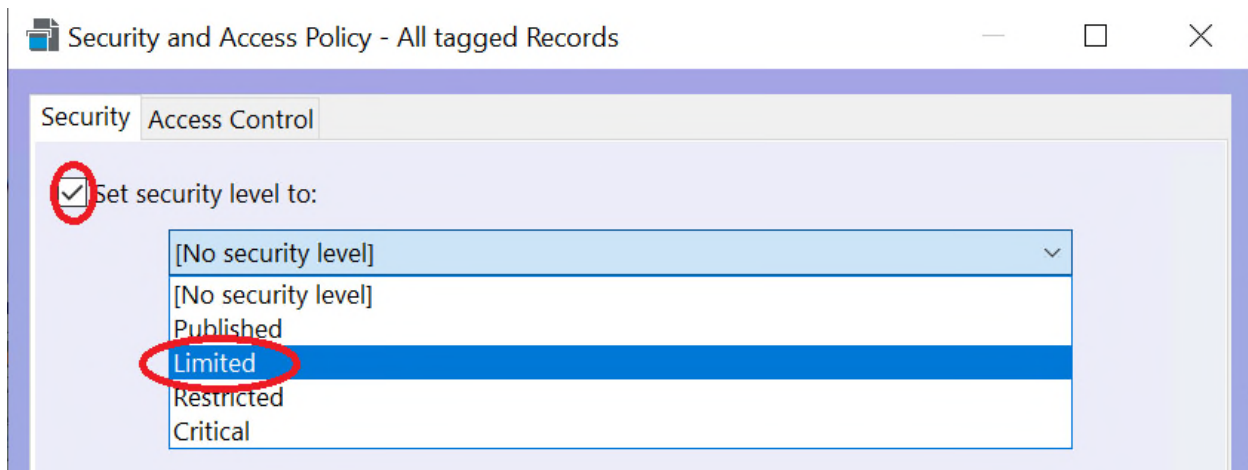


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Click **OK** to apply the forthcoming change to **All Tagged Rows**:



In the resulting window, check the box next to **Set Security Level To**, and then click on the accompanying dropdown and select **Limited**:





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In the same window, under the **Access Control** tab, click in the white spaces to the left of **View Document** and **View Metadata** to tag them (#1 below), and then click **Container** (#2 below) to restrict access to these records to your agency. Once you've done that, hit **OK** at the bottom of the window (#3 below):

The screenshot shows the 'Security and Access Policy - All tagged Records' window. The 'Access Control' tab is selected. The 'Set Access For:' section contains a table with the following items:

	Access control	Change Requested
☒	Access control	
☒	View Document	No change
☒	View Metadata	No change
	Update Document	No change
	Update Record Metadata	No change
	Modify Record Access	No change
	Destroy Record	No change
	Contribute Contents	No change

Handwritten annotation 1 points to the checkboxes for 'View Document' and 'View Metadata'. Handwritten annotation 2 points to the 'Container' button in the 'To:' section. Handwritten annotation 3 points to the 'OK' button at the bottom.

Below the table, the 'To:' section has buttons: No Change, Clear, Container, Private, and Custom. The 'Container' button is selected.

Below the buttons, the 'Behavior with respect to Record Type access control references:' section has three radio buttons: ☒ No Change, ☐ Access controls bypass any Record Type reference, and ☐ Access controls apply together with any Record Type references.

At the bottom, there is a text box for '<Enter an update comment for the audit log>' and three buttons: OK, Cancel, and Help.



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In the resulting window, click **Yes To All** to apply these changes across the tagged records. The security for the records in question has now been changed:

