How to Create Folders in the DMS

Archived

How to create folders in the DMS

Introduction

Creating folders within the DMS (Document Management System) allows you to have a hierarchical structure on which permissions can be applied. If you have access to the Admin panel, you can create folders via the Documents Control Panel. If you have the required permissions, you can also create folders via the front-end Documents application.

Creating folders in the back end - Document Control Panel

Go to Applications > Admin > Documents. Click on Manage Document List.

☰ Manage Document List

Click New Folder on the right hand side. The folder location you are within will determine where the new folder will be added. So if you are within the Root folder, the new folder will be added to the Root level, whereas if you are within an existing folder that is present at Root level, you will ultimately be creating a subfolder.

ⓘ You will need to have the appropriate permissions to add a folder at Root level.

Complete the New Folder properties.

New folder

Add to folder	Finance Documents
Folder name	
Description	☑ Inherit
Workflow	-- None -- ▾
Documents text is searchable	Inherit from parent (▾
Display documents in "What's New" list	Inherit from parent (▾

New folder

- Enter a name for your new folder in Folder Name.

- In the description field, enter a description of the contents of the folder. Checking the Inherit box means that the description will be pulled from the parent folder, so the descriptions will be the same. This option is not available if you are adding a folder to the Root level.
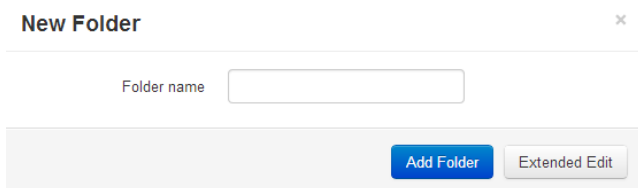
- The "Documents text is searchable" option means that the folder will be indexed to enable users to search for it. By default this is switched on, with the "Inherit from parent (on)" option selected. Changing this option to Off will mean that the folder content will not be searchable.

Once you have completed the details, click New Folder. Once created, you will receive a confirmation message, saying that the folder was succesfully added.

Creating folders in the front end - Documents application

Adding folders in the front end Documents application is a very similar process. Go to Applications > Documents. Navigate to the folder you wish to add a folder to, and click Add Folder.

A pop-up will appear where you can simply enter the name of the folder, and click Add Folder.

New Folder   ×

Folder name   [_____]

[Add Folder]   [Extended Edit]

Clicking Extended Edit will take you to a page where you can enter further details about the new folder, which is very similar to the page within the Documents Control Panel.

New folder

Add to folder	HR Documents
Folder name	
Additional Information	[text area] ☐ Inherit
Description	[text area] ☐ Inherit
Workflow	-- None -- ▼

[New folder]

Enter the relevant details, and click New Folder.

Last modified on 22 May 2019 by Mhairi Hutton

Created on 28 April 2014 by Kerensa Johnson
Tags: dms