

Folder Structure & Moving items

Archived

It is recommended to read the "Create A Folder" and "Folder Permissions" user guides to reinforce understanding of the documents application in Claromentis and how to use it.

Introduction

A folder directory structure is the organisation of an operating system's files and how this is displayed to a user. Files are typically laid out in a hierarchical structure. In Claromentis there is no limit to how many folders or subfolders can be created. This is restricted only by the amount of space on your server.

If your system is hosted by us you will have 100GB free storage, please [contact us](#) if you would like to purchase more.

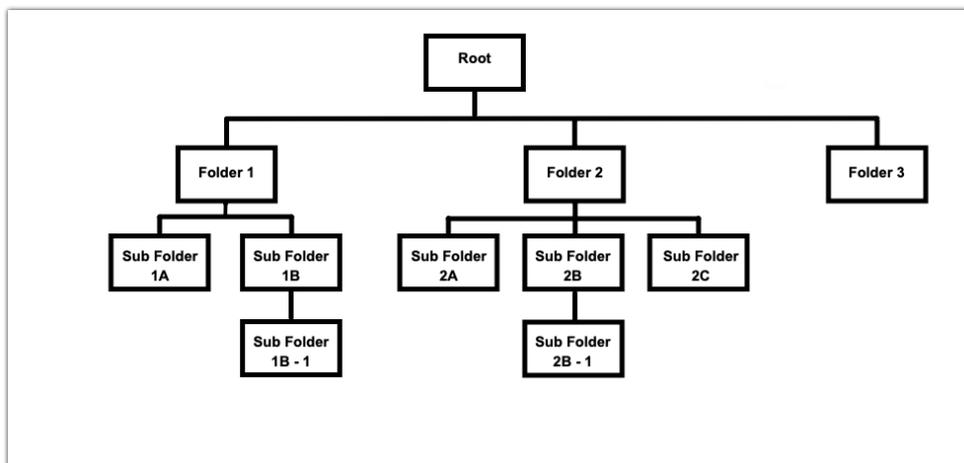


Image 1 - Basic folder structure diagram

The visual presentation of folders shown in Image 1 is displayed slightly differently in Claromentis.

- The structure is exactly the same and the lines that convey the relationship between folders can still be seen.
- However, instead of the folders expanding downwards, they are visualized moving horizontally.
- Have a quick look at Image 1 compared to Images 2, 3, 4 & 5 to familiarise yourself with these differences .

Folder Structure Breakdown - Admin

Folders can be manipulated from both the front end and Admin panel. Permissions control the levels of access users have on the front end, whereas those with application administrator rights will be able to access the admin panel as well.

An administrator of Documents will always be able to edit permissions from the admin side and 'edit permissions' rights can only be configured from there and not on the front end at all.

For this reason, administrators of Documents should be trustworthy as they are going to be able to access all folders and files without being given any permissions on the front end.

For this demonstration, we will start by accessing the hierarchy from the back end. Go to Admin > Documents > Manage Documents List to follow along.

On the Admin side, an overview of the whole directory is given. The **root** folder is the highest level of the folder structure, as shown in Image 1 and in Claromentis in Image 2 onwards.

- In this example, we can see the folders "Discussions", "Document Library" and "Drop Zone" all sit at the Root.
- Folders can be added to the root, but the root cannot be placed elsewhere as it is the overarching level of the directory.
- The "Add folder" button will take you to the same new folder properties screen as explained in the "Create A Folder" user guide.

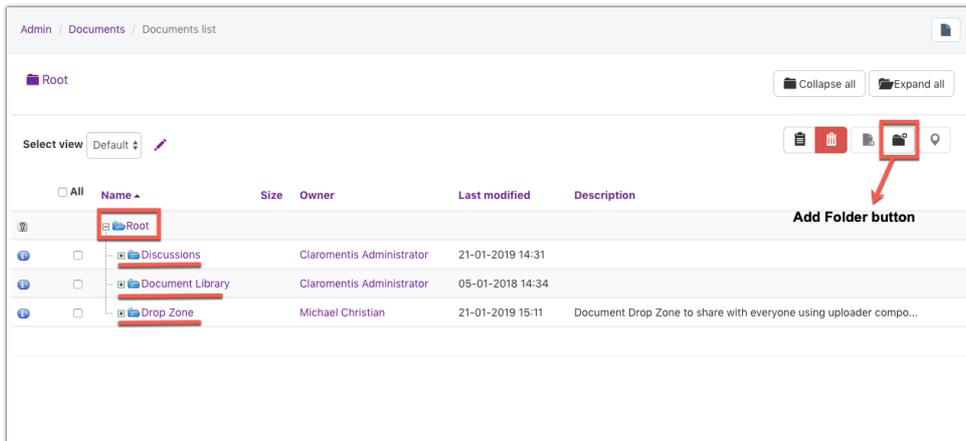


Image 2 - Folders shown at the Root

A **subfolder** is one that resides inside of another folder (it's parent folder). In Claromentis you can create as many subfolders as required, just like those in Image 1.

- Clicking the plus icon will expand the corresponding folder, open up the structure and show its contents.
 - The icon will now display a minus. Click it again to collapse the folder back.
- There are "Collapse all" and "Expand all" buttons at the top right of the screen.
 - Every folder in the system will then be expanded/collapsed all at once using these.
- In Image 3 the "Discussions" folder has been expanded to reveal its contents, a subfolder called "Demo Folder" and a file called "Sample Document".

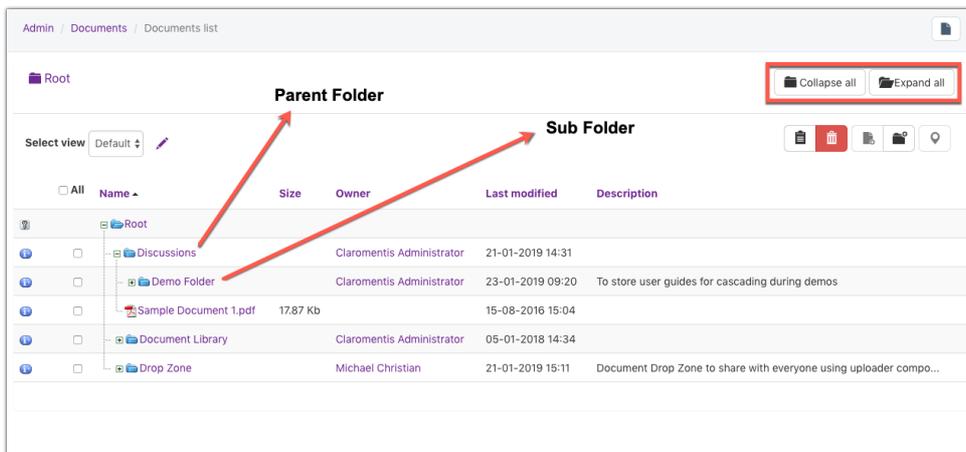


Image 3 - "Discussions" folder has been expanded to reveal its sub folder's and files

In Image 4 the subfolder "Demo Folder" has now been expanded. It contains 3 subfolders and a document called "Demo_template".

- Notice how upon expansion the structure is moving to the right and new lines have appeared to show the relationship between each folder/file.
- The plus and minus icons can be seen clearly to denote when a folder has been expanded and when it is collapsed.

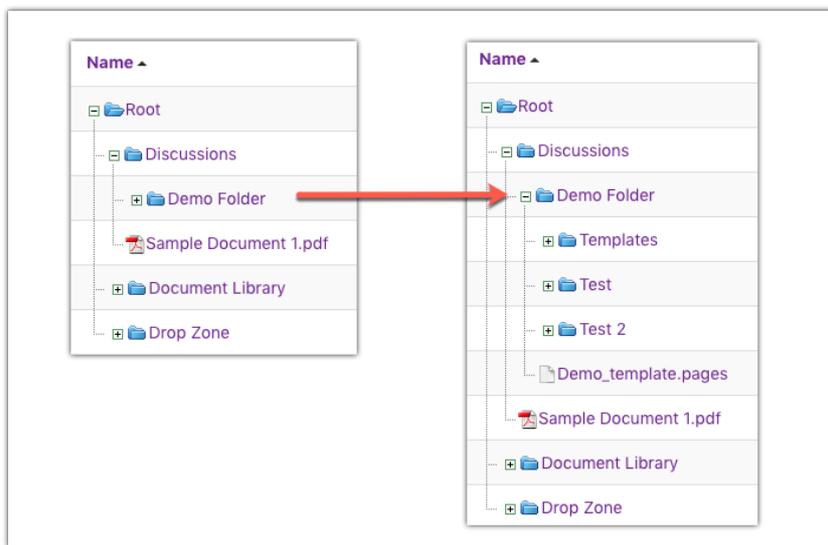


Image 4 - Closer look at folder structure and how it is displayed with expansion

In Image 5 the structure has been expanded further to reveal several layers of subfolders within "Test 2".

- The "Test 2" folder also has two subfolders of its own: "Important Documents" and "Important Policies"
- Currently, they sit within 2 levels of subfolders, it may be more appropriate to keep anything important more easily accessible within the structure.
- Moving the folders closer to the root would make finding the folders easier.

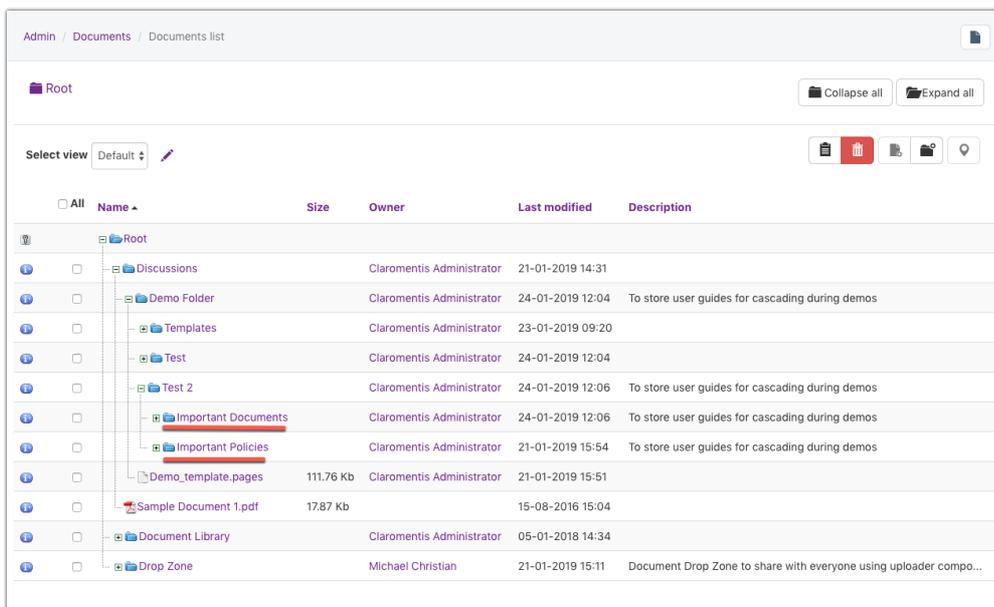


Image 5 - Several levels of subfolders within the "Demo Folder"

Moving folders/files from the admin side

"Important Documents" and "Important Policies" will be moved to the first level of "Discussions". Follow the steps below and see Image 6 to do the same for a folder in your system. Any folder can be moved in this way as long as you have the correct permissions.

1. Navigate to the level where the folders/files you wish to move are or expand the directory using the cross icons until you can see them
2. Check the boxes to the left of each folder
3. Add your selections to the clipboard by clicking on the clipboard icon that now appears
4. Your selections will now appear at the top of the screen
5. Navigate to the new location you wish to move the folders to in your directory (You must be inside the folder you wish to move them to - in this example we are in the 'Discussions' folder)
6. Click the 'move' button at the top of the screen and a green confirmation message will display 'pasted' to show the change was successful

PLEASE NOTE - If you wish to move your selected folder(s) to the root, ensure you do not manually navigate to a location (ignore step 5) and instead are at the root level when you click 'move'; the folders will be sent to the root as no formal location has been specified.

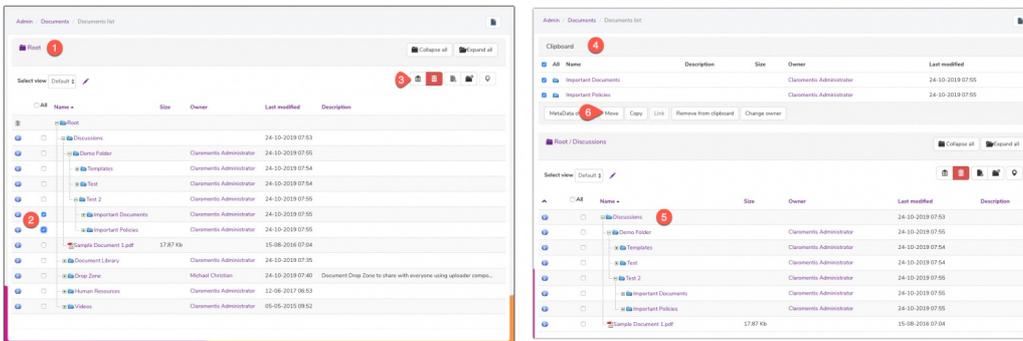


Image 6 - Moving folders from the admin side

Documents from the Front End

In the front end of the documents application rather than an overview of the whole directory shown in the back end, each click of a folder brings up its contents straight away.

- Instead of plus/minus icons to expand, a folder is instead expanded by clicking through, shown in Image 7.
- The pathway is always shown at the top of the screen to show your location in the directory.
- The "Parent folder" button when clicked will take you to the parent folder of the one you are currently in, effectively moving up a level.
 - Once you reach Root level, the parent folder icon will disappear as you have reached the top of the directory.

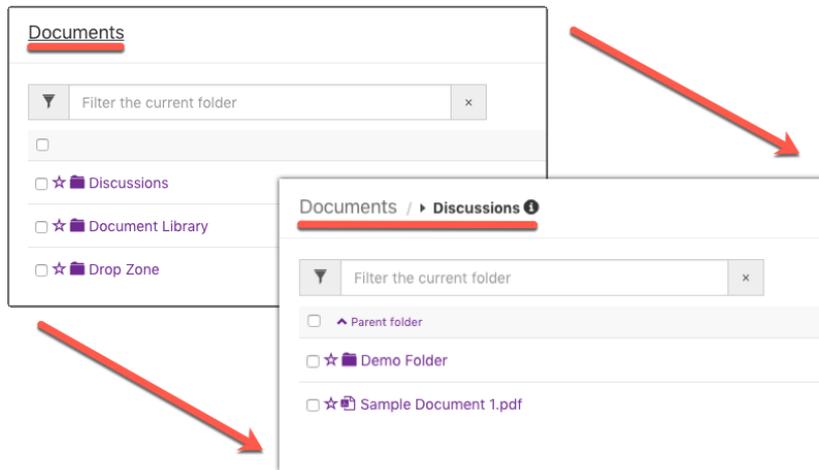


Image 7 - Expanding the "Discussions" folder and the on screen journey

The way folders are displayed in the directory can also be changed.

- In Image 8 the views available are labeled: List View, Minimal List, and Thumbnail View.
- The one currently being used is Minimal List, so its button is greyed out and the configuration displayed on the left of the screen.
- These views can be toggled at any time whilst using the documents application from the front end.

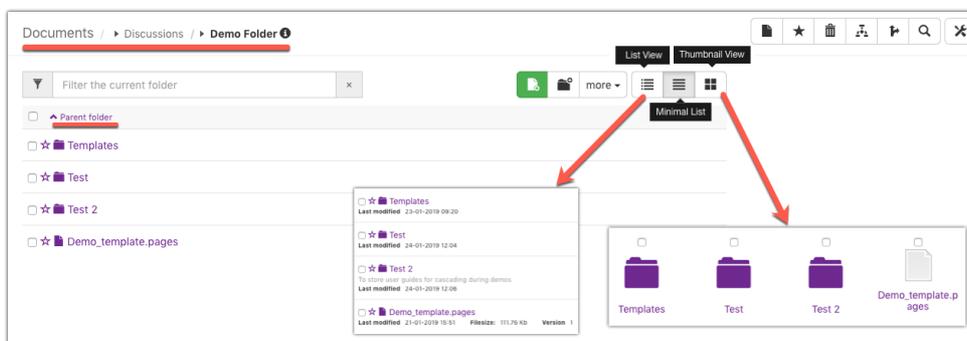


Image 8 - Different views in Documents application

There is also a search function in Documents accessible from the front end. It is a "Filter" bar on the top left of the screen underneath where the pathway is displayed. (See Images 7 & 8).

- Inputting keywords/document names will search the folder you are currently in.
- Any hits from the search will appear, click them to open.

- Keeping file/folder names logical and concise helps improve the search functionality.
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Moving folders/files from the front end

"Important Documents" and "Important Policies" will be moved to the first level of "Discussions" as we saw above in image 6 from the admin side but this time we will do so from the front end. Follow the steps below and see Image 9 to do the same for a folder in your system. Any folder can be moved in this way as long as you have the correct permissions.

1. Tick the boxes to the left of all the folders/files you wish to move.
2. Click on the "Clipboard" Icon.
3. The "Clipboard" sub-menu will appear, select the "Move" icon.
4. A pop-up will appear asking you to select the folder's new location. A new window will be opened showing the whole directory, select your chosen new location.
5. The pop-up has auto-filled with the location selected in step 4. Click submit and a green "ok" will appear to confirm the folders have moved.
6. Now navigate to your chosen location and you will see the folders have moved there successfully.

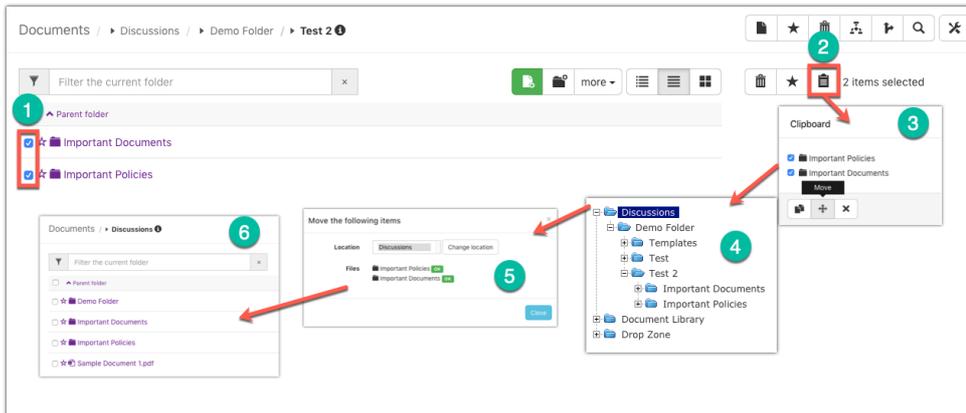


Image 9 - Steps to move folders and change their directory location from the front end

Top Tips:

- Keep folder/file names appropriate and concise.
- Logically store files within the most suitable folders.
- Important or shared files should be easy to find and not hidden within complex levels of folders.
 - Keep the most important at the root or within one folder sub-level.
- Too many subfolders can stop being helpful and actually begin to impede workflow.

Related Article

[Creating a Folder](#)

[Folder Permissions](#)

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