Documents: Creating a Folder

Introduction

Creating folders within the DMS depends on a hierarchical structure where permissions are applied at each level to give different users/roles/groups access.

Application administrators of Documents can see the whole directory (and files within) from the Admin side of Documents.

End-users are given front-end permissions by administrators to interact with folders and files in specific ways

Please note: Application administrators of Documents should be trusted chosen individuals as they can see every folder/file from the Admin side and do not require front-end permissions to interact with content from this area.

Creating folders in the admin end - As an administrator

Go to Applications > Admin > Documents.

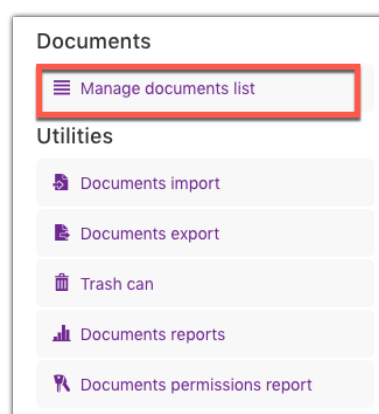- Click on Manage Document List as highlighted in Image 1.

Image 1 - The "Manage documents list" button will be on the right-hand side of the screen

You will be presented with the screen shown in Image 2. This outlines the folder structure as it currently stands.

- 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 you will be creating a subfolder.
  - You will need to have the appropriate permissions to add a folder at the Root level (see this guide for more information).

In this example, a new subfolder will be created within the existing "Discussions' folder.

When you are at your desired level click "New Folder" on the right-hand side.
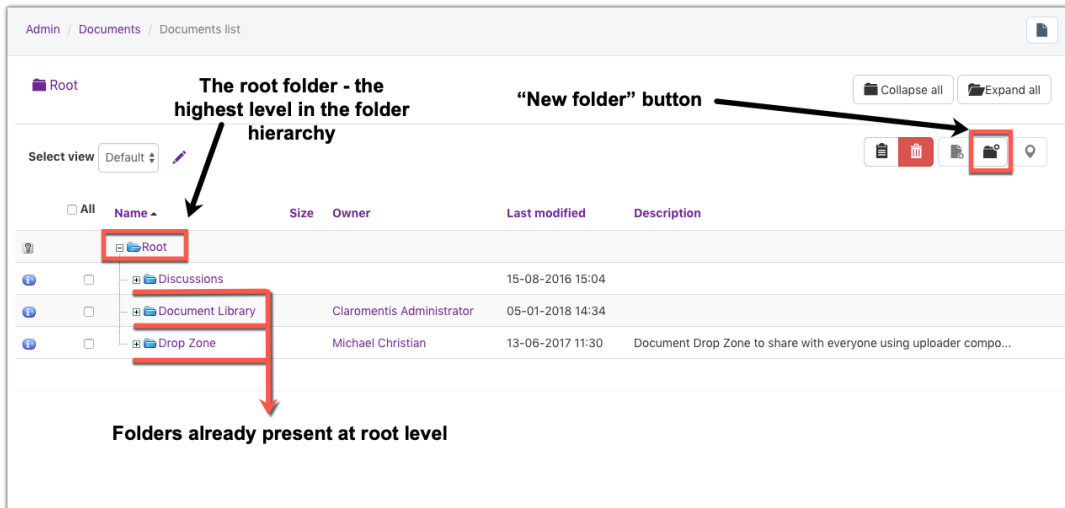

Image 2 - Root menu screen. Folders and subfolders as well as the files within them are displayed.

You will now see the screen shown in Image 3.

- Fill in the New Folder properties.
  - Enter a name for your new folder.
  - In the description field, enter a short explanation of the contents of the folder.
    - Checking the Inherit box means that the description will be pulled from the parent folder. (This option is not available if you are adding a folder to the Root level.)
    - Also, the permissions set for this folder will be inherited from the parent folder.
    - 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.
- With all details complete click 'New Folder'.
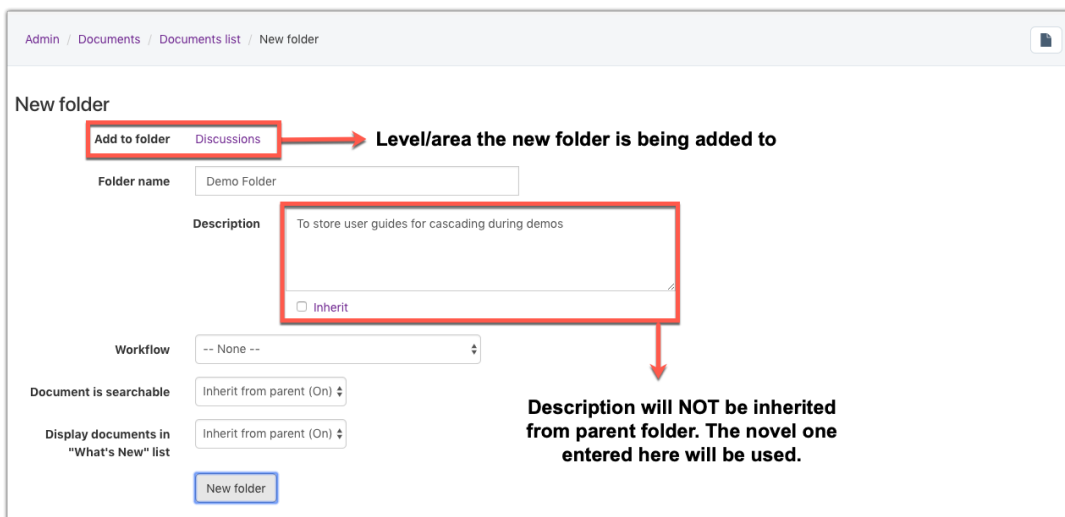- Once created, you will receive a confirmation message that the folder was successfully added.

Image 3 - New folder properties screen

You will be returned to the folder structure once you have added your new folder.

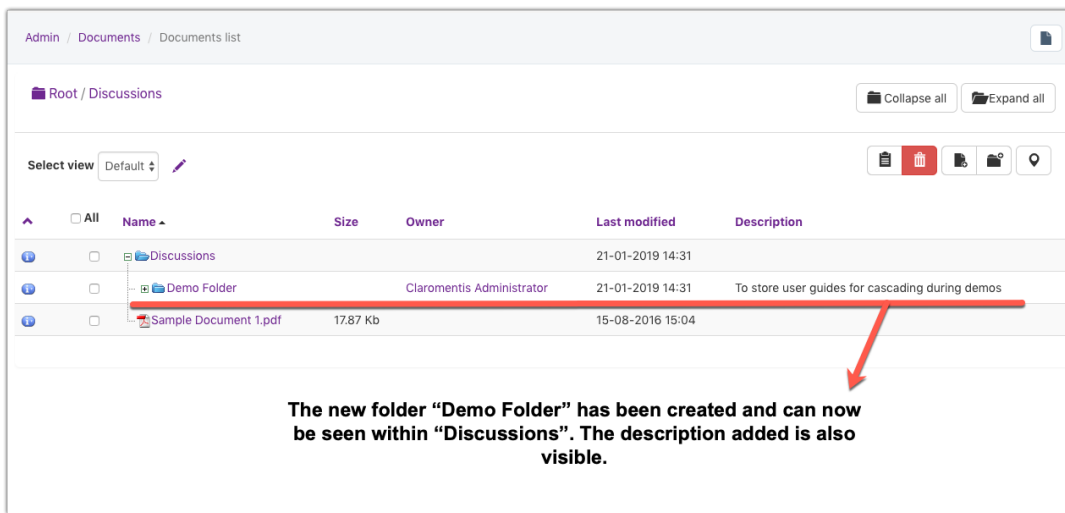- You should be able to see your creation now listed in the hierarchy.

Image 4 - The new folder is shown within the chosen location; the "Discussions" folder

Creating folders in the front end - As an administrator or end-user with permissions

Adding folders in the front end of the Documents application is a very similar process to the admin side.

- Go to Applications > Documents.
- Navigate to the folder you wish to add a folder to and click Add Folder.
  - In this example, a new folder will be made within the existing "Drop Zone" folder
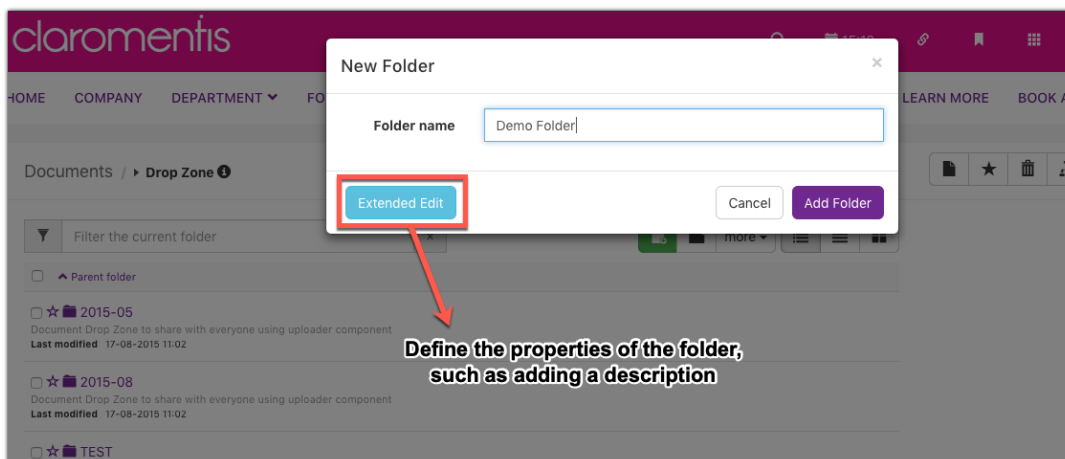

Image 5 - Naming the new folder

- A pop-up will appear where you can simply enter the name of the folder, and click Add Folder.
- 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 shown in Image 3 above.
- Enter the relevant details, and click New Folder.
- The "Demo Folder" has been created and is now visible in the "Drop Zone" folder. As shown in Image 6
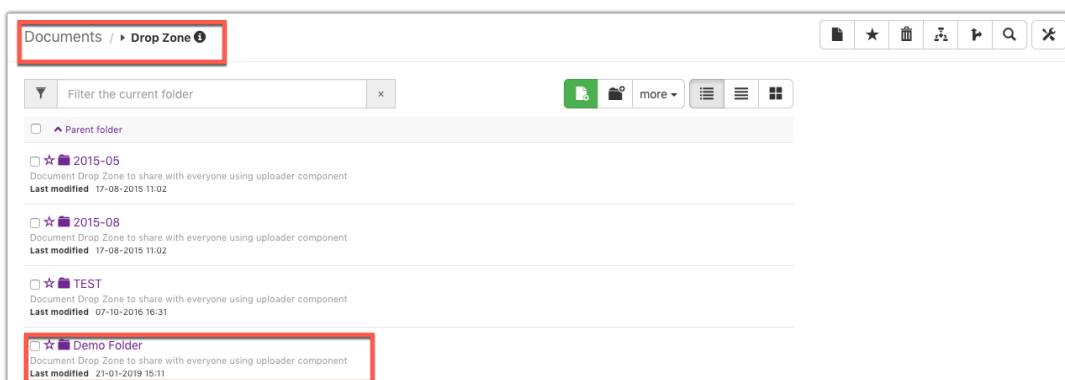

Image 6 - Newly created "Demo Folder" displayed inside the "Drop Zone" folder