Documents: Creating a Folder

Creating folders requires specific permission to carry out.

Application administrators of Documents can interact with the whole directory (and files within) from the Admin side of Documents, including creating folders at any level.

Because of this access administrators should be trusted 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.

In contrast, users are given front-end permissions by administrators to interact with folders and files in specific ways, including being able to create folders.

This guide will cover how an administrator can create a folder from the admin side of Documents and how a user can do so from the front end.
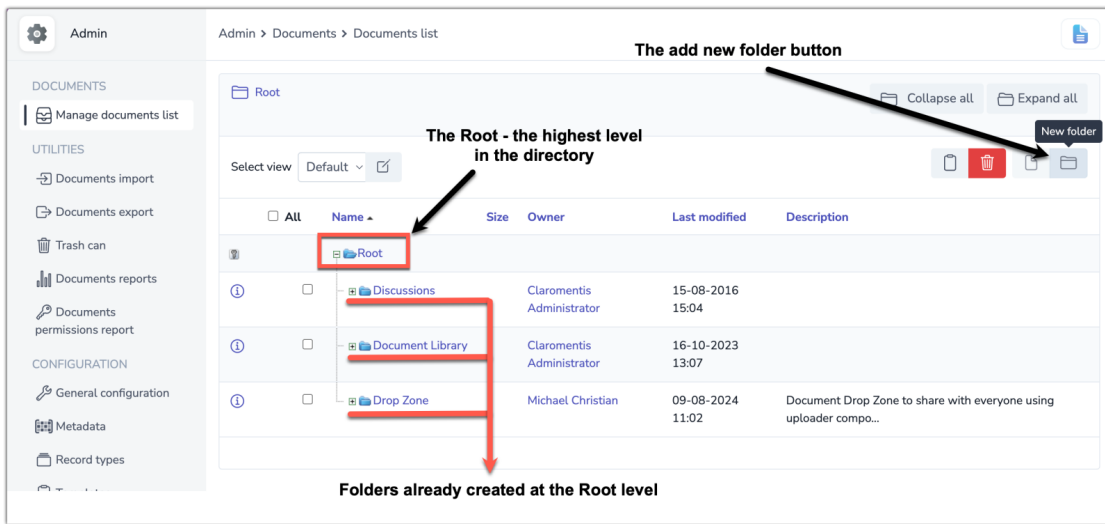
Creating folders on the admin side (Administrator only)

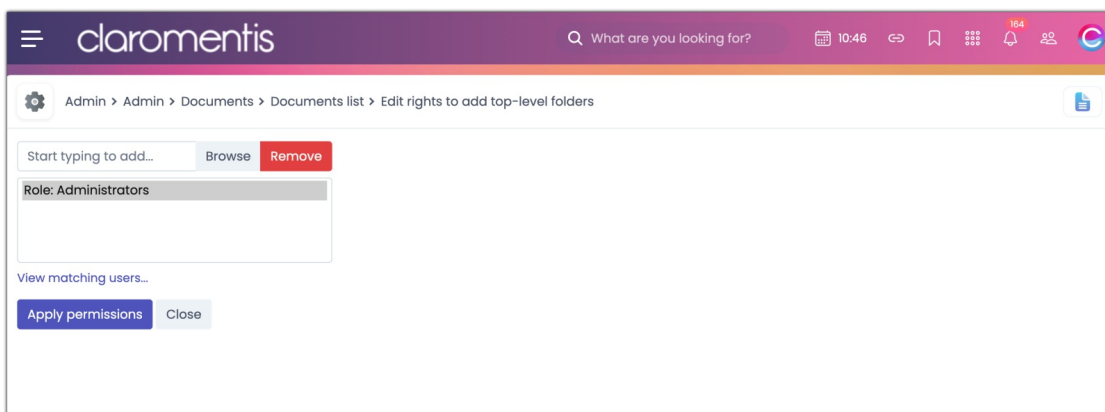Go to Applications > Admin > Documents > Manage Document list

The whole directory is shown.

The folder location you are within will determine where the new folder will be added.

Adding folders to the top most level (the Root) requires special permission to be given first, which administrators can change.

Click the key symbol in line with the Root title to update this:
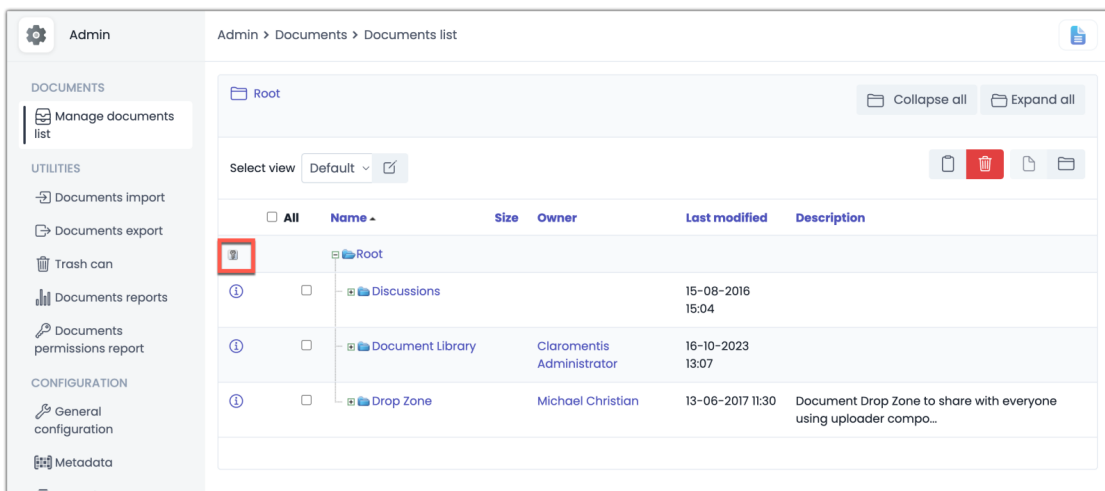
We recommend using a People Role or Group for Administrators and including this to give them all the ability to create folders at the Root.

- Creating a folder at the Root

Navigate to the Root and click the 'New Folder' button.

On the next screen fill out its properties:
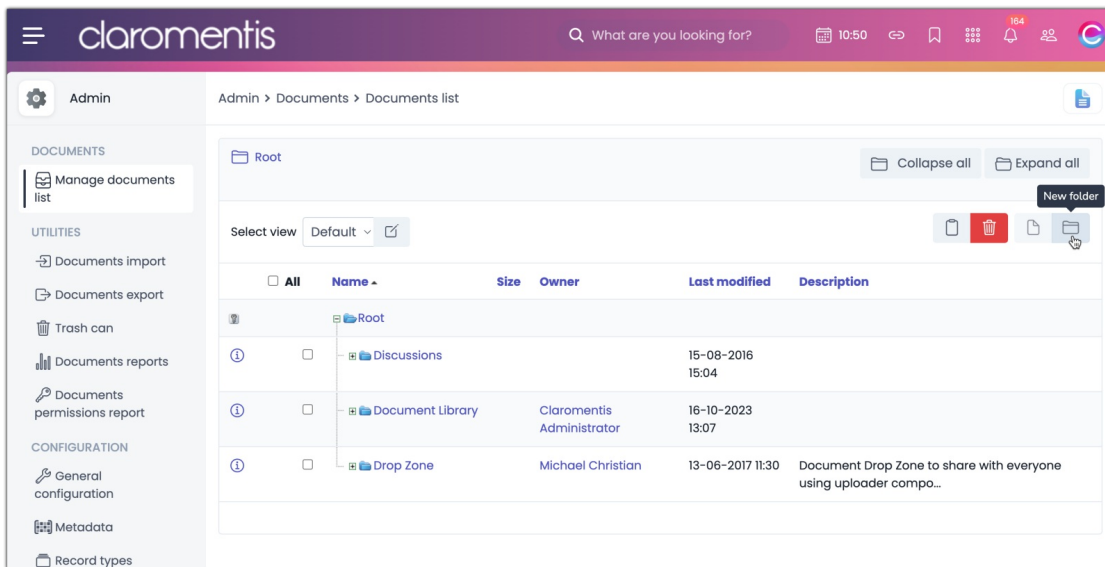

Folder name: The title of the folder

Description: A short explanation of the contents of the folder.

Workflow: (Optional) If a document workflow is implemented, select the one to apply to this folder.

Document is searchable: The folder will be indexed to enable users to search for it, allow this to inherit from the parent or not.

Display documents in "What's New" list: This folder's contents will appear in the 'What's new' component where it has been placed. Inherit from the parent or not.

Click 'New folder' once complete to save.

The permissions box will now appear to fill out, enter users/roles/groups and give them permissions as appropriate.

The profile that created the folder (e.g. you in this example) will auto populate in the box with all permissions given and will be labelled as the 'Owner' of the folder.
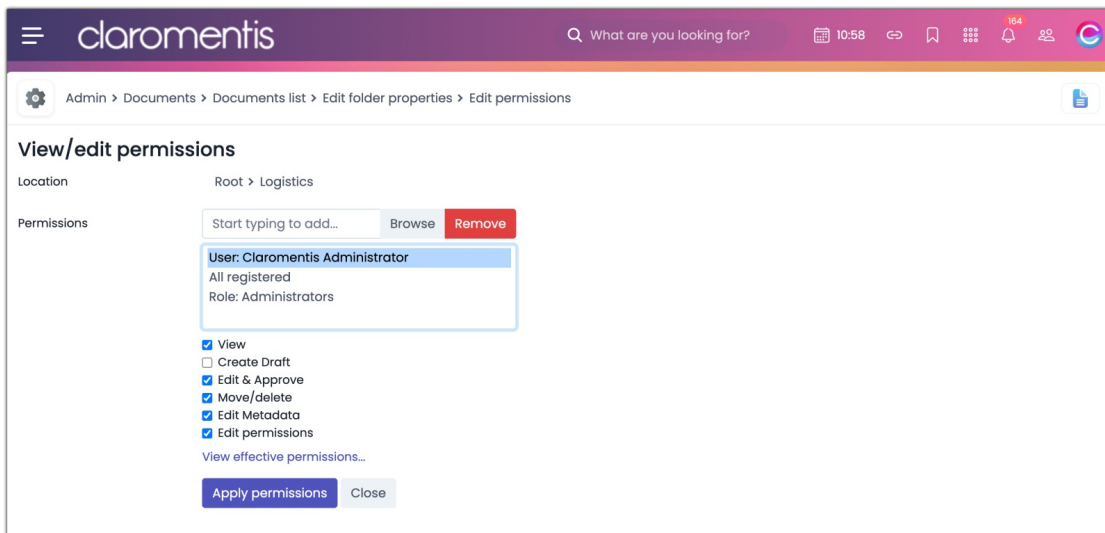
Once ready click 'apply permissions' and the folder will be created with permissions applied.

Use the breadcrumb trail to navigate back to the directory to see your new Folder listed at the Root.
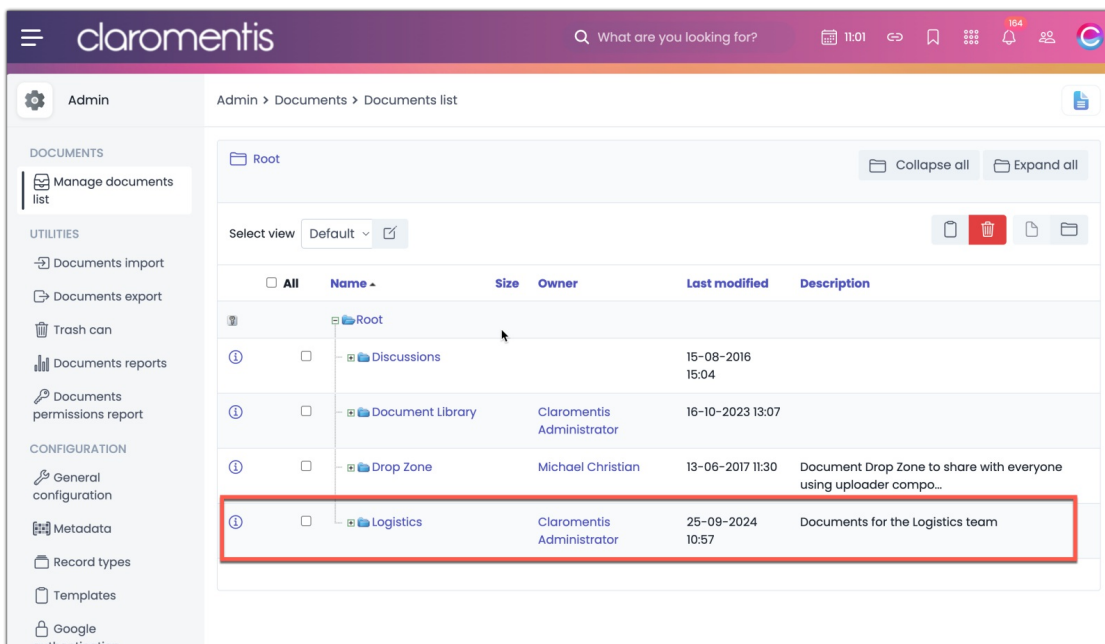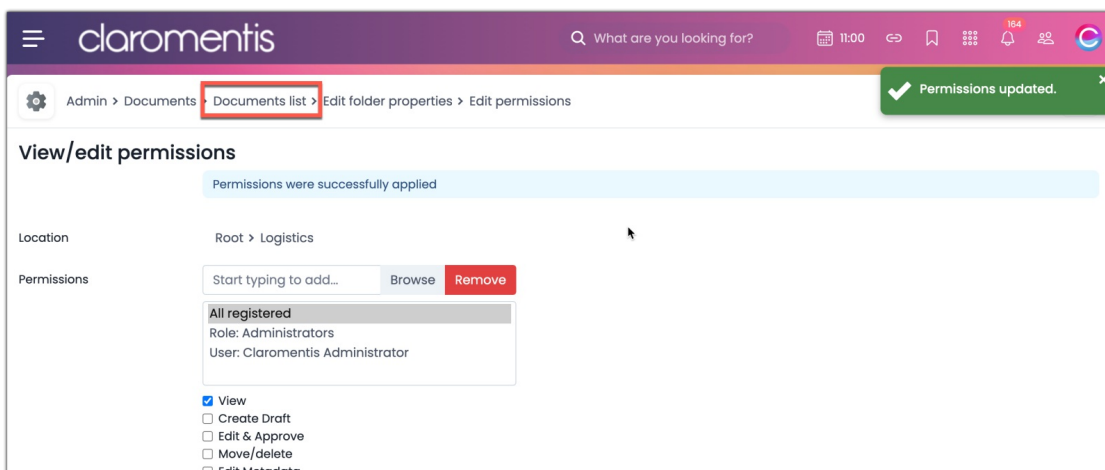
- Creating a new folder at other levels

Navigate to the folder level you want to create a new folder at.

The same options as described for the Root will appear and can be followed to create the Folder, as shown in this video for the sub folder 'Trucks' which has been created in 'Logistics' which is at the Root.

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For any subfolder, the description will pull through and can only be edited if the 'inherit' checkbox is deselected; then once saved, the new folder can be edited.

All subfolders created will inherit its parent's permissions by default - if these need to be changed, edit the permissions once the folder is created and deselect the checkbox.

Remember the general logic that determines which users/roles/groups will appear at the sub-levels. If those you expect aren't selectable, they have not been defined in the parent folder and must be added there first.

Creating folders in the front end
(Front-end permission)

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

Users can only add to the Root level if they have the special permissions outlined earlier.

Navigate to Applications > Documents and the level the new folder should be created at.

A folder can be created by just giving it a title, and it will be created immediately with permissions set to inherit.

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Or the 'extended edit' option can be chosen where the description can be edited before creating the folder:

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Only users with the 'edit permissions' right can alter permissions on the front end, so your team can decide who should be changing these and give the rights accordingly (either end users that create the folders, administrators only or both)

Once decided, if end users should be able to make edits, ensure they have been given the 'edit permissions' right by an administrator, otherwise once they create folders on the front end these will remain with permissions set to inherit and they cannot edit this without administrator help.