

Adding new folders manually can be done in three ways. First, you can add a new folder on the fly while filing a document from the “File Single Document” screen (also known as the File/Review Screen). Second, you can add new folders by going into the “Manage Folders” screen. And third, you can create new folders directly from the “Browse Folders” locating screen.

Adding a Folder through Manage Folders

Once a cabinet has been created, and the metadata fields for that cabinet are specified, folders can be added very quickly:

1. Begin by selecting the Cabinet Type, then click Add Folder.
2. Fill in all of the required metadata fields for your folder (all with a red asterisk).
3. Add any notes needed for the folder. *If notes are included as part of a folder setup, you can use those notes as keywords when conducting a search in the Content Search locating screen.*
4. Click Save.

Adding a Folder through File Single Document

Folders can also be created while filing a document. Once you have selected the cabinet your document belongs to, you can add a folder on the fly by simply typing in the information (metadata) for this new folder.

A word of caution, if you are filing a document into a folder that has already been created, select “Existing Folder” next to the metadata information and select the correct folder. Typing in the folder name and saving will create a duplicate folder. When you type data in the metadata fields, a new folder will be created. To avoid multiple folders with the same subject, always check Existing Folder to see if one has been created.



Adding a Folder through Browse Folders

New folders can also be added on the fly when users are on the “Browse Folders” locating screen. Simply click the folder icon next to the cabinet you would like to add a folder to, then fill in all required metadata to save the new folder.

