

# Managing Folders

From the menu, click Admin, then click Folders under the Fileroom Management column, or click the Folders button below the admin menu.

## Add Folder

Personal Private **Default**

Cabinet **Students** + From To

Description Search Clear Notes

Action	Student Name	Student ID	DOB	Declared Major
<input type="checkbox"/>	Bethany Planter	789654123	10/05/1998	Art History
<input type="checkbox"/>	Greg Johnson	654321987	11/20/2000	Education
<input type="checkbox"/>	Jamie Jones	321456987	06/21/1999	English
<input type="checkbox"/>	Kevin Conrad	654789312	12/11/2000	Computer Science
<input type="checkbox"/>	Paula Adams	469871326	11/29/1999	Physical Education

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1. Select the Cabinet you want to add a folder to.
2. Click the + button located to the right of the Cabinet field.
3. Enter the required information for the Folder Fields.
4. Click the Save button.

## Edit Folder/Folder Security

1. Select the Cabinet the folder belongs to.
2. Use the folder detail fields to locate the folder, then click any of the folder details to open the folder.

Personal Private **Default**

Cabinet **Students** + From To

Description Search Clear Notes

Action	Student Name	Student ID	DOB	Declared Major
<input type="checkbox"/>	Bethany Planter	789654123	10/05/1998	Art History
<input type="checkbox"/>	Greg Johnson	654321987	11/20/2000	Education
<input type="checkbox"/>	Jamie Jones	321456987	06/21/1999	English
<input type="checkbox"/>	Kevin Conrad	654789312	12/11/2000	Computer Science
<input type="checkbox"/>	Paula Adams	469871326	11/29/1999	Physical Education

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3. In the pop-up window, update the folder details as needed.
4. If you would like to make a folder a private folder, check the Private Folder bubble, then add the Groups/Users you want to give folder access to.
5. When you are finished, click the Save button.

Students Fields

Values

\* Student Name

Bethany Planter

Student ID

789654123

DOB (mm/dd/yyyy)

10/05/1998

Declared Major (Majors)

Art History

Notes

Save

Folder Security

Personal

Private

Default

Groups with Access

1. Demo User

2. Education

3. Human Resources

4. Legal

5. Medical

6. Parts

7. Super Admin Users

8. Supplier

Users with Access

1. Administrative Office

2. Demo User

3. Drew Johnson

4. Financial Office

5. Human Resources

6. Legal Person

7. Medical Admin Office

8. Parts Person

9. Pat Slim User

10. Patrick C

11. Sandy Jones

Documents

Doc Name	Sub-Divider	Doc Type	Doc Tab	Status	Doc Date	Entry Date
Bethany Planter Student Verification Form - FinAid	Financial Aid	Student Verification Form - FinAid	Default		11/11/2020	11/11/2020
Bethany Planter App	Application Documents	Student Application	Default		11/08/2020	11/09/2020
Bethany Planter Student Clarification of Income Form	Financial Aid	Student Clarification of Income Form	Default		11/08/2020	11/09/2020
Bethany Planter Student Transcript	Transcripts	Student Transcript	Default		11/08/2020	11/09/2020

## Delete Folder

Personal

Private

Default

Cabinet

Students

Description

Search

Clear

From

To

Notes

Action	Student Name	Student ID	DOB	Declared Major
<div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>	Bethany Planter	789654123	10/05/1998	Art History
<div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>	Greg Johnson	654321987	11/20/2000	Education
<div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>	Jamie Jones	321456987	06/21/1999	English
<div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>	Kevin Conrad	654789312	12/11/2000	Computer Science
<div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>	Paula Adams	469871326	11/29/1999	Physical Education

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Please note, you can only delete a folder if it is empty and there are no recoverable documents for the folder.

1. Under the Actions column, click the Delete button next to the folder you want to delete.
2. A confirmation message will appear at the top of the page. Click Yes to confirm.

## Share Folder/Sub-Divider

☐ Personal
 ☐ Private
 ☒ Default

Cabinet 
+
↑
 From  To

Description

Search  Clear

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<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Bethany Planter	789654123	10/05/1998	Art History
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<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Jamie Jones	321456987	06/21/1999	English
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Kevin Conrad	654789312	12/11/2000	Computer Science
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Paula Adams	469871326	11/29/1999	Physical Education

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This action emails an external link to view the documents within the folder or sub-divider you share. You do not need to reshare the folder or sub-divider when documents are deleted or added.

1. Under the Actions column, click the Share Documents button next to the folder.
2. In the pop-up window, enter the Email(s) you want to share the folder to.
  - If you would like to share only one sub-divider in the folder, select the Sub-Divider.
  - If you would like the documents to be editable, check the box for Editable Link.
3. Enter the End Date.
4. Click the Share button.

## Move Folder

☐ Personal
 ☐ Private
 ☒ Default

Cabinet 
+
↑
 From  To

Description

Search  Clear

Action	Student Name	Student ID	DOB	Declared Major
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Bethany Planter	789654123	10/05/1998	Art History
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This action allows you to move a folder from one cabinet to another.

1. Under the Actions column, click the Move Folder button next to the folder.
2. In the pop-up window, start by selecting the cabinet you want to move the folder to.
  - If you need to add a new folder in the cabinet you selected, click the blue + next to the Cabinet field, then enter the folder information and click the blue Create Folder button. You will then see the new folder selected in the Folder field.
  - If you are merging the folder to an existing folder in the cabinet, select the folder in the Folder field.
3. Select the sub-divider in the Sub-Divider field, unless you need to add a new one. To add a new sub-divider, click the blue + next to the Sub-Divider field to add a new one to the selected

cabinet.

- If you want to delete the original folder after you submit, check the Delete Folder box.

4. When you are ready, click the blue Submit button.

## CM Link

Personal Private Default





















Cabinet Students

Description

Search Clear

From To

Notes

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<input type="checkbox"/>    	Paula Adams	469871326	11/29/1999	Physical Education

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If you would like to link an Account to an existing folder, please follow the steps below:

1. Under the Actions column, click the CM Link button next to the folder you want to link an Account to.
2. Select the Account (and Contact If needed).
3. Click the Add button.

## Assign Onboard

Personal Private Default





















Cabinet Students

Description

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From To

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If you would like to assign an onboard to an existing folder, please follow the steps below:

1. Under the Actions column, click the Start Onboard button next to the folder.
2. In the pop-up window, select the Onboard.
  - Check Retroactive if you want the to count existing documents in the folder.
3. Click the Add button.