



## FAQ: Folder Management

**Important:** Access to the folder management options are set according to the user role you have been given. If the folder options are greyed out and you are unable to click on them, then the user role you have been given, prevents you from accessing them. If you require access to a folder, contact your Portal Administrator who can assist you.

**Q: How can I hide my folder structure?**

Use the **Hide folders toggle** on the top right-hand side of the entity management screen to hide/show your folder structure.

**Q: How can I add a new folder?**

Click on the **Add folder** option and type in your new folder's name. Select the **Parent folder** from the drop-down list that you would like your new folder to sit under and click on **Save**.

**Q: How can I change the name of an existing folder?**

Click on the **Edit folder** button under the status column for the folder you wish to edit. Type in the amended name and click on **Save**.

**Q: I want to move a folder to sit under a different parent folder, how do I do this?**

You can move a folder using either the **move to** option or by **editing** the folder.

**Move to:** Select the folder you want to move by ticking the **check box** next to the folder name. Click on the **Move to** button and select the new parent folder from the drop-down list, then click on **Save**.

**Edit:** Select the **Edit folder** option for the folder you wish to move. Choose the new parent folder from the drop-down list and click on **Save**.

**Q: How do I delete a folder?**

Select the folder you want to delete by ticking the **check box** next to the folder name. Click on the **Delete** button and then click on **Yes** to confirm.

*Note: If your folder contains entities, you will need to move these entities into another folder or delete them if they are no longer required before you can delete the folder.*

**Q: How can I assign a user to allow or prevent them from accessing one of my folders?**

Select the folder you want to assign user access to by ticking the **check box** next to the folder name. Click on the **Assign user** button and select the user's name from the drop-down list. Choose the relevant access level (either No access or Access) and then click on **Save**.

*Note: The system defaults to the Access option for all users that have been assigned the relevant user role.*

**Q: Why am I unable to add, edit or delete a folder?**

Your Portal Administrator will have assigned you a user role, that will determine what access you have to folders, entities, and tasks that you can perform. If you are unable to select the folder options, then you may not have access to do this. Contact your Portal Administrator, in the first instance to review your access levels.

For more information see the **Folder management guide**.