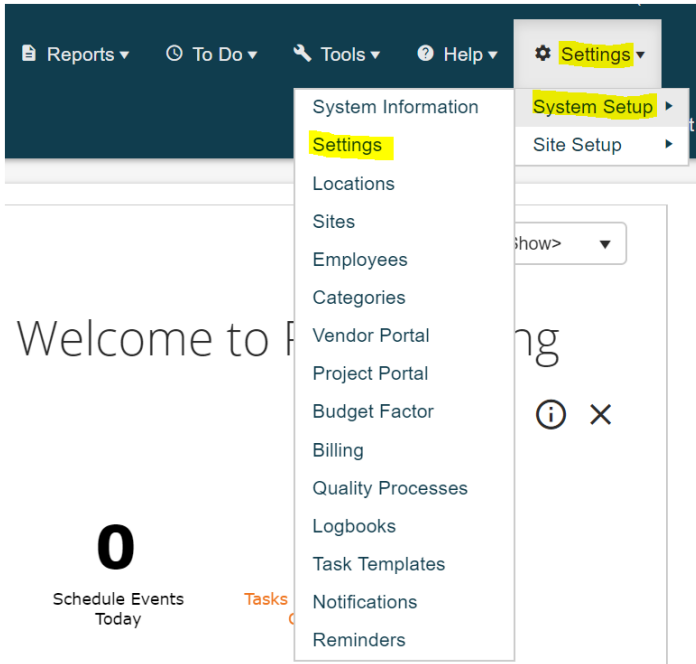
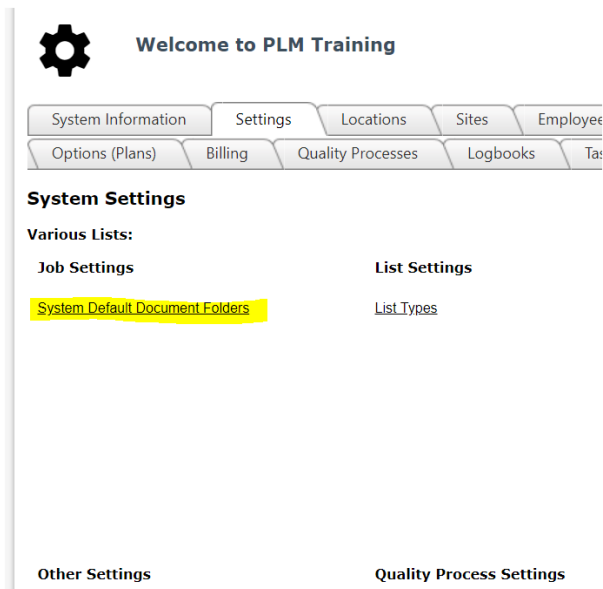


Adding Default Document Folders

To add Default Document Folders hover over Help/Tools in the blue toolbar → Tools→ System Setup→ Settings.



First column single click on System Default Document Folders.



Adding Default Document Folders

If 'Lock Folder Creation' is checked users cannot edit and/or delete any of the folders created regardless of their employee document permissions.

Select 'Auto Create Folder Structure For Each New List Added' for folders to create instantly.

To add a Folder click the **+Add Folder** button.

System Setting

Lock Folder Creation

Auto Create Folder Structure For Each New List Added


+

Folder Name	Is Locked
Other Job Documents	No
Photos	Yes
Selection Documents	No

Add your Folder Name description then **Save**.

Folder Name

Is Locked

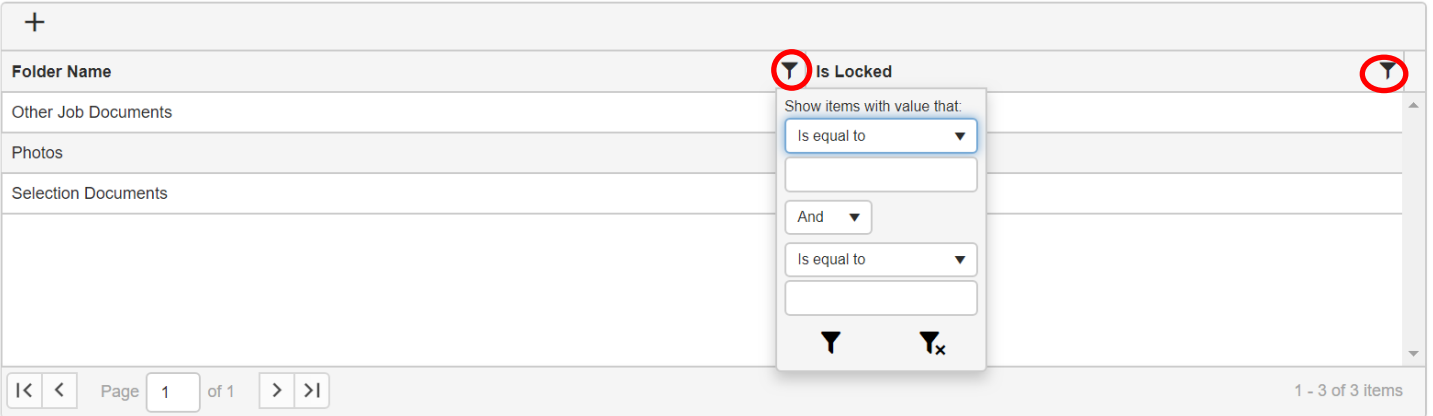
 

If "Is Locked" is checked the folder cannot be moved documents stored within the folder cannot be edited or deleted.

Important: The folders that are setup will only be added to new Jobs, Companies and Sub/Tech records.

After your folders have been added you can search by clicking on the funnel in the Header. This provides many search filters.

Adding Default Document Folders



Folder Name

Other Job Documents

Photos

Selection Documents

Is Locked

Show items with value that:

Is equal to

And

Is equal to

Page 1 of 1

1 - 3 of 3 items

Sample of Default Document Folders added to a New Job

Job Name: Mickey Mouse

Job ID: 7-77

Status: Under 1 Yr Warranty

Lot #: 777

Close Date: 01/02/2019



Mickey Mouse rherndon@verisk.com
556 Stone Road, Madison, WI 53700



Tasks: 4 Incomplete: 3 Due Today: 0 Overdue: 2 Future: 1

Documents: 6

Correspondence: 21

Items: 11 Open: 9 Due Today: 0 Overdue: 7 Review: 0 Repair: 0

of Lists: 7

Average Age: 35.3

Total Costs: \$57.50

Estimate: \$70.00

Over/Under: (\$57.50)

Job Snapshot

Detail Owners (1) Lists (7) Schedules (2) Tasks (4) Plan Vendors Costs** Correspondence (21) Documents & Pics (6)

Document Merge Quality Processes (3) Equipment Change Log

Documents

Select All Photos (Current Job)



- [-] _Master Documents
- [+] Attachments
- [+] Lists
- [-] Other Job Documents
- [-] Photos
- [-] Selection Documents

Title	Description	Master	Viewable in Portal	View	Changed
	Pictures	No	Job, Project		- 02/22/2019 08:14 AM
	Pictures	No	Job, Project		- 02/22/2019 08:14 AM
	Pictures	No	Job, Project		- 02/22/2019 08:14 AM

Adding Default Document Folders

****Important:** For an overview of how to upload Documents & Pictures please refer to the following reference document **Uploading Documents & Pictures** available on the University under Training Documents → Estimator & Project Manager.