Creating and Managing a Favorites Folder for Documents

Creating a Favorites folder for documents allows you to store your frequently-used documents in one location for quick access. When you create a **Favorites** folder,

  〉 it is accessible to only you and is saved with your profile

  〉 it is managed by you

  〉 added documents/folders may be renamed by you (the renamed document/folder is only accessible via your profile and does not change the document name accessible by others)

  〉 the search feature includes your **Favorites** folder

Follow these steps to create and/or manage your **Favorites** folder.

Creating the Favorites Folder

While in an order, if a **Favorites** folder does not already exist,

  1. Click the **Documents** button

  2. Click the **Add to Favorites** button on the **Document Selection** toolbar

The **Favorites** folder is created and is the first folder in the Documents tree.
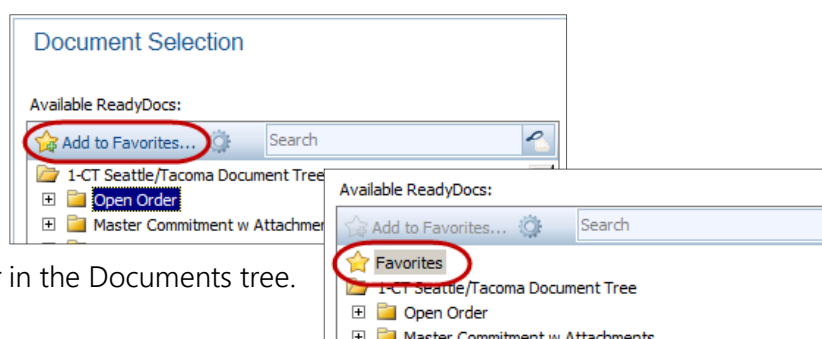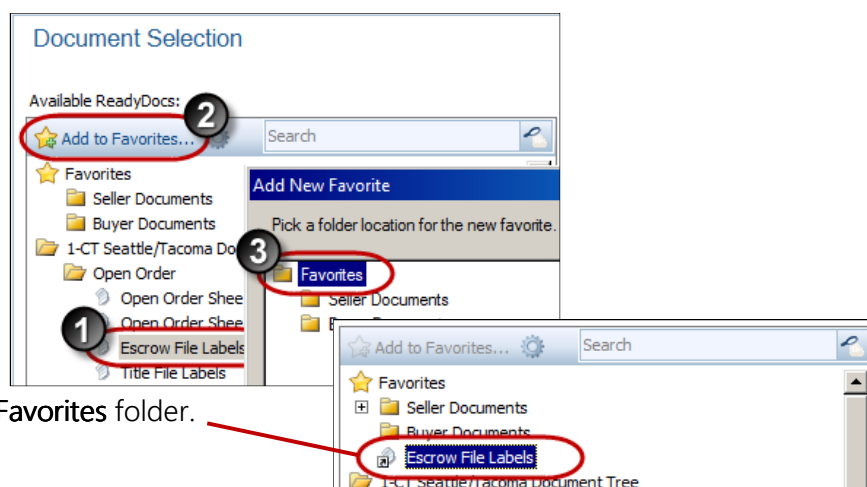
Adding to your Favorites Folder

You may add individual documents or entire folders from the Documents tree. Things to remember when adding to your **Favorites** folder,

  〉 only one document or folder may be added at a time

  〉 when selecting an existing folder to add to your **Favorites**, all of the documents contained within the folder are added as well

  〉 you need to specify where in the folder new items are to be saved (if you have multiple sub-folders)

  1. Click the existing document (or folder) you wish to add

  2. Click the **Add to Favorites** button

  3. Select the **Favorites** folder (or a sub-folder, if you wish the documents to be stored in a sub-folder)

The document (or folder) then appears in your **Favorites** folder.

Dated: 08.01.2016

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Managing your Favorites Folder

1. Click the **Manage Favorites** ⚙ icon

2. Highlight a document (or folder) to activate the action buttons; when the **Favorites** folder is highlighted, only the **New Folder** button is activated

3. Click the button for the action you wish to perform (actions only effect documents/folder **within** your Favorites folder)

   a. **New Folder** – creates a new folder

   b. **Move** – allows you to move a selected document/folder

   c. **Rename** – allows you to rename documents or folders

   d. **Delete** – allows you to permanently remove a document/folder
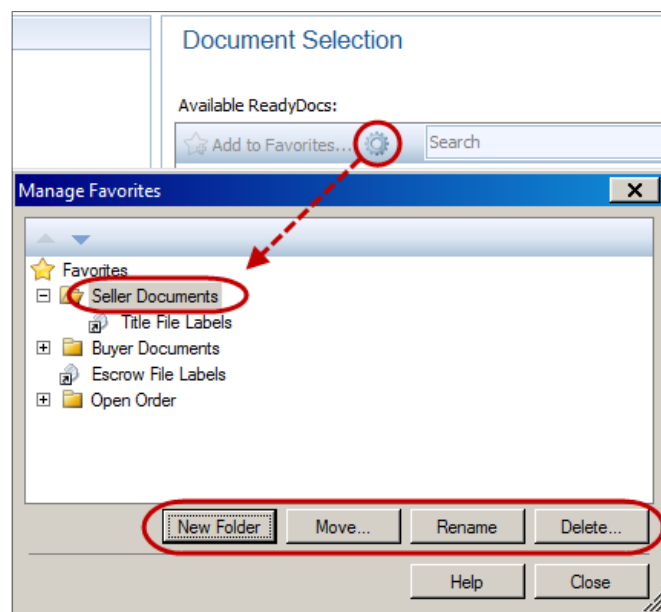
REMINDER:

〉 Documents (or folders) added to your **Favorites** folder are accessible to you in all orders

〉 When a folder is added to your **Favorites** folder, all of the documents contained therein are copied to there as well

〉 Moving a document/folder to your **Favorites** creates a copy of the document or folder; it does not remove it from your Document Tree

〉 All actions (move, rename, delete, new folder) occurs only within the **Favorites** folder; the actions have no effect on documents or folders within the Company Document Tree