Create New Folders

Steps to Create a New Sub-Folder in the Completed Folder

Note: Each user needs to perform these actions from their own inbox. There is not a way for the system administrator to complete this process across the system.

- Go to the Performance Module from the main menu
- Click on the Completed Folder
- From here you can click Create New Folder link in the left panel

What is the Maximum Number of Forms We can Put into a Completed Folder?

Currently there is a maximum number of 65535 forms that will display in a single completed folder for 1 person. For this reason, if you have a user that gets copied on all forms, and this number is likely to exceed 6500, then we recommend you create sub folders as described above and move forms to the subfolders each year.
How Do I Mass Move Forms into My New Folder?

Note: Each user needs to perform these actions from their own inbox.

- Go to the Performance Module from the main menu
- Click on the Folder that your forms are currently in (typically your forms will be in your completed unfiled folder.
- Tips to manage large numbers of documents
  - Change the "Items per page" setting to display all your unfiled forms on one screen
  - Make sure your setting is on "All" forms and not just "My Direct Reports" so that you can see all documents.
- Now select all the forms you wish to move into your new folder
- At the top of the page under Move to Folder, select the folder from the dropdown list to move forms to
- Click the Move button

How Do I Rename a Folder?

Note: Each user needs to perform these actions from their own inbox.

- Go to the Performance Module from the main menu
- Click on the Completed Folder
- Click on the folder you wish to rename
- You will now see a button called RENAME in the top section
- Click this button and enter the new folder name and save

Steps to Remove a 'Completed' Document Folder

You may perform the following steps if:

- You are logged in as the user OR you are a Proxy for the User (you must have been granted proxy rights).

1. Choose the Performance or My Forms tab.
2. Select the 'Completed' documents folder link.
3. Choose the link for the completed document folder you would like to delete.
4. Click the 'Delete' button
   - NOTE: The folder you wish to delete MUST be empty before the 'Delete' button will appear. If the folder contains documents move them to another folder other than 'Un-Filed'. You will not be able to move documents back to the 'Un-Filed' folder once they have been moved out of it.

The following message will appear in the upper left hand corner of the page indicating that the folder was deleted successfully:

'! Folder was removed'