

The Documents Tab

On the Documents tab you'll see documents we have shared with you as well as any you have uploaded to the Portal. The documents are stored in a secure encrypted form.

The screenshot shows the 'DOCUMENTS' tab selected in a navigation bar. Below the navigation bar, there is a header area with 'All Files' and two buttons: 'ADD DOCUMENT' and 'CREATE NEW FOLDER'. A search bar is present with the text 'Search for Folders and Documents'. The main content area displays a list of folders and documents:

Folder/Document Name	Owned By	Created On	Count/Size	Actions
Bonds	Layton Frederick	12/2/2015	35	ACTIONS
Commercial Insurance Policies	Layton Frederick	11/18/2015	2	ACTIONS
Essential Documents	Layton Frederick	11/18/2015	0	ACTIONS
Testing the notifications	Clay	4/21/2016	1	ACTIONS
Adding documents for Client Portal.pdf	Layton Frederick	3/15/2016	440 KB	ACTIONS
CAP Team Action Items 2016.xlsx	Layton Frederick	3/18/2016	13 KB	ACTIONS
MemorialDay_053016.pdf	Jason	5/31/2016	81 KB	ACTIONS
test DOC.pdf	Franzi Wedeking	3/23/2016	85 KB	ACTIONS

Under the Actions drop-down you can download the document, move it, rename it, or delete it.

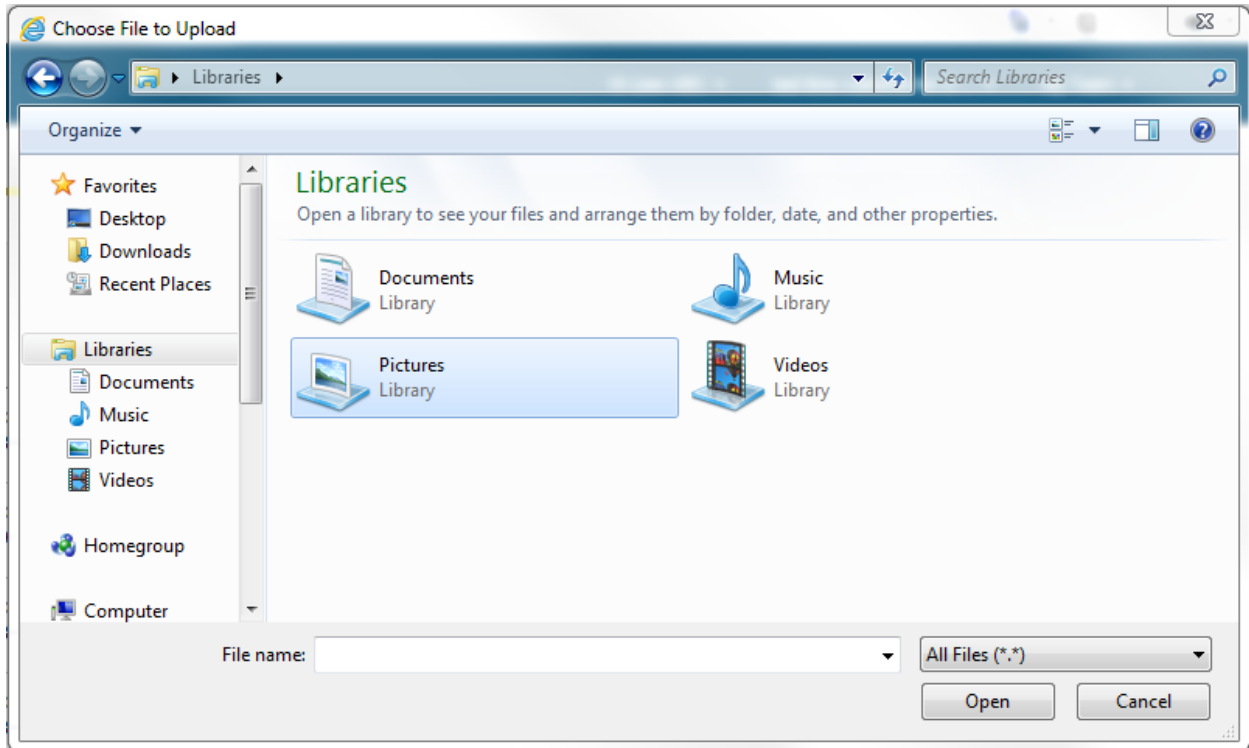
This screenshot is similar to the previous one but shows the 'ACTIONS' drop-down menu open for the 'Bonds' folder. The menu options are:

- Open
- Move
- Rename
- Delete



To add a document, click **Add Document** above the document list.

This is a close-up of the header area of the Documents tab, showing the 'All Files' dropdown and the two buttons: 'ADD DOCUMENT' and 'CREATE NEW FOLDER'.

Windows file browser will open up to allow you to browse for the document you would like to upload.



When you successfully **Open** the file of your choice it will appear in the document list.

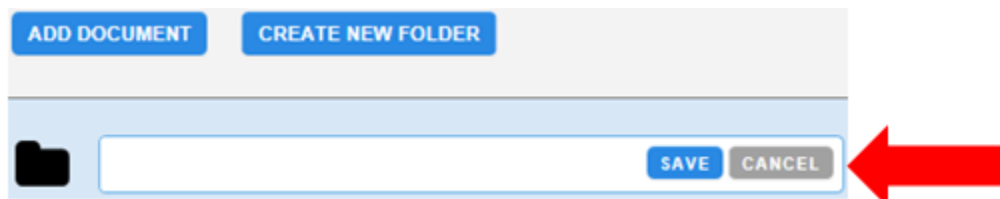
	RCS Documents OWNED BY Layton Frederick	CREATED ON 8/3/2015	2 Items	ACTIONS ▾
	IMG_2034.jpg OWNED BY User ABC	CREATED ON 9/16/2015	1 MB	ACTIONS ▾

Creating a folder:

1. Select the "Create New Folder" button.

CREATE NEW FOLDER

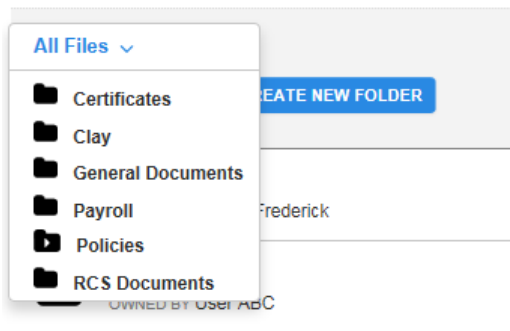
2. Type the name of the folder you wish to create. Click **Save** when done.



3. The folder will appear in the list of folders that are in the documents list. (Take note that each folder has who created it under the folder name.)

 Bonds OWNED BY Layton Frederick	CREATED ON 12/3/2015	35 Items	ACTIONS ▾
 Commercial Insurance Policies OWNED BY Layton Frederick	CREATED ON 11/19/2015	2 Items	ACTIONS ▾
 Essential Documents OWNED BY Layton Frederick	CREATED ON 11/19/2015	0 Items	ACTIONS ▾
 TEST  OWNED BY Layton Frederick	CREATED ON 6/18/2016	0 Items	ACTIONS ▾
 Testing the notifications OWNED BY Clay	CREATED ON 4/21/2016	1 Items	ACTIONS ▾

You can also use the drop down menu above the **Add Document & Create New Folder** for sorting views.



Within the Documents Tab there is a search bar for you to be able to find the exact document you need without having to click around for it. **Example:** If I know I am searching for information from a 2015 file, I would just type 2015 and it will display the exact location.

