

To add folders and/or reorganize the folder tree click on the **Doc Folders** button in the **Setups** menu group.

You can add, rename, move and delete folders as you are used to do in Windows.

The only unusual feature is that you can change the **order of folders** that are on the same level on the tree by selecting a folder and clicking the **up-down arrow buttons**. This feature allows you to override the usual alphabetical sequencing of folders, and order them in accordance with some more rational scheme instead.

When there are no active document revisions in a folder, the folder will be empty when viewed in the Document Menu module.

If you don't want to display empty folders, check this box.

When organizing your documents, keep in mind that **document viewing permissions are granted per folder** (presented in the next slide).

Don't show empty folders in Document Menu module

Click the **View Permissions** button to setup the **document viewing permissions** for individual users.

Document viewing **permissions are granted per folder**. If the user has no permission to view a folder, it will not be visible in his or her **Doc Menu** module when they log in.

Note: By default, newly established users have full permission to view all documents in the system.

To deny permission, uncheck the box next to the folder.

In this example, Jessica Halverson can view all documents in folders and sub-folders of the **ISO 9001 QMS** and **Quality Control** categories, and **Work Instructions** in the **Operations** category.

To open the setup box, select the user and click the **Set Viewing Permissions** button.

This is a simple utility for composing the images for document headers and footers. If you prefer, you can compose these images in another application, such as Adobe PhotoShop, for example, and then use this dialog box to import them as background images only.

Click this button to open the Header and Footer editor.




Header and Footer Image Editor

Use this simple image editor to create company logo/branding that will be attached to documents headers and footers. Click on the tabs below to edit the header for the first page, header for the second and subsequent pages, and footer.

First Page Header | 2nd Page Header | Footer (all pages)

This image will appear above the document control header on the first page of a document. (size 650 x 50 pixels)



You can also make the images in another application (Photo Shop, for example), and then bring them here as the background images (click the 'Bcg Image' button).

Click on the gray button to select a text line, and then click on the color, move, etc.

Background

- Bcg Color
- Bcg Image
- Fit Image
- Delete Image

Logo Image

- Logo image: Logo Image
- Resize image: 100%
- Move image: [Left Arrow] [Up Arrow] [Down Arrow] [Right Arrow]
- Delete logo image: Delete Logo

Text Lines (Company name, address, etc.)

- [Gray Button] Your Company Name, Inc.
- [Gray Button] City Name, State - www.yourwebsite.com - youremail@your
- Font
- Color
- Move text line: [Left Arrow] [Up Arrow] [Down Arrow] [Right Arrow]

Help | OK | Cancel | Apply

You can create up to three lines of text. Each can be different font, size, and color. Use the arrow buttons to position the text.

End of Slide Show. Thank You for Watching

