Folders

User Guide

Version: Foundation 22.2

Written by: Documentation Team, R&D
Date: Tuesday, February 17, 2026

Documentation Notice

Document Name

Folders User Guide

Department/Group

Documentation

Revision Number

3.6.x

Table of Contents

About folders

A folder groups documents and other folders together according to a logic that you and the administrator define.

A folder can contain subfolders, documents, and shortcuts. Each folder is assigned a folder type that allows you to easily identify its purpose. Based on your organization's business needs, you administrator can restrict the type of documents and folders you can store in a folder.

Open a folder

In the Folders App, the viewer enables you to open a folder from a list based on privileges the administrator configures for you. To open a folder and view its contents, complete the following steps.

1. To display a list of available folders, select a folder view.
2. In the displayed list, select the folder you want to open. The system displays the folder in the folder viewer.

Delete a folder

To delete a folder from the views grid, complete the following steps.

1. From the views grid, select the folders you want to delete.
2. Click **Delete** .
3. Click **Yes** to verify.

Types of searches

Search allows you to define multiple constraints to filter documents, folders, tasks, or workflow items in the current view and returns the results that satisfy any or all of the defined conditions. After you define the search constraints you want to apply, you can group the constraints, reorder the constraints, and save the search criteria as a filter. The options in the field list vary depending on which module you are using. The options in the operator list vary depending on which field you select. You can use the following search types in Perceptive Experience.

Normal constraint search

A normal type constraint allows you to search on a static value that you define when creating the constraint. The view only returns the results that satisfy that constraint.

For example, when you create a normal type constraint on the document field Type, select the operator equal to and then type the value `Invoice`, the system only returns documents that have a document type of invoice.

Variable constraint search

A variable type constraint allows you to use a variable value, such as the current user or current date and time, instead of a static value. You can specify a user or date variable for any search constraint that could use a date or user variable as a value.

For example, when you create a variable type constraint on the document field Created by, select the operator equal to and then select the value Current user's user name, the system only returns documents created by you.

Prompted constraint search

A prompted type constraint allows you to enter a value when running the view. When you run a view, the system displays a dialog box allowing you to enter the value you want to search for. The view only returns the results that satisfy the constraints with the value you entered in the prompt dialog.

For example, when you create a prompted type constraint on the folder field folder status and select the operator equal to, you can then search for folders by selecting either Active or Inactive from a drop-down list in the prompt dialog. You can re-run the searches and change the prompt value at any time.

Folder search conditions

A Search applies a single condition or multiple conditions to the folders in the current view and returns the results that satisfy the condition. You define each condition by selecting an available combination of field, operator, and value as described in the Fields list below.

Folder searching guidelines

When building a folder search condition, keep the following guidelines in mind:

- If you are performing a prompted search, you do not specify a value when creating a search condition. A message box appears instead of a value box.
- If you are performing a variable search, you can select one of the following values to use as a variable for the current user: user name, first name, last name, title, organization, organization unit, locality, or user ID. You can also use the current date and time as a variable.

Fields

The following fields are available to use when defining a condition.

Created

The date the folder was created.

Created by

The user who created the folder.

Created within (days)

The number of days within which the folder was created.

Possible values include any numeric value.

Folder ID

The unique ID of the folder.

Possible values include any alphanumeric value.

Folder status

Whether the folder is active or inactive.

Has required documents

Whether the folder has required document types.

Is in workflow

Whether the folder is in workflow.

Modified

The date a user last modified the folder.

Modified by

The user who last modified the contents or properties of the folder.

Name

The folder name.

Possible values include any alphanumeric value.

Next task due

The date the next task associated with the folder is due.

Status changed

The date the folder's status changed to active or inactive.

Status changed by

The user who last changed the folder status.

Summary task count (active)

The number of active tasks assigned for the folder.

Possible values include any numeric value.

Summary task count (inactive)

The number of inactive tasks assigned for the folder.

Possible values include any numeric value.

Summary task status

The status of the task associated with the folder.

Possible values include Assigned, Returned, Complete, Complete Pending Review, Canceled, and Invalid.

Type

The folder type value.

Possible values include all folder types the user can access.

Workflow item ID

The workflow item ID for the folder.

Possible values include any alphanumeric value.

Workflow queue

The workflow queue the folder is currently in.

Possible values include all workflow queues the user can access.

Workflow status

The status of the folder in workflow.

Possible values include Idle, Working, On hold, Pending, Waiting for routing, and Waiting for inbound action.

Workflow user

The user who added the folder to worklow.

What is a composite property?

A composite property stores multiple values or sets of values that are based on one or more existing custom properties, and groups and refines the metadata that users use to describe the items in your system. With composite properties, you can add multiple sets of values.

You can perform a search to locate documents, folders, tasks, and workflow items based on composite property values just as you would when searching on any item property.

Search for an item

To create a search constraint and search for a document, folder, task or workflow item, complete the following steps.

1. In the **Views** pane, select the view you want to use as a basis for your search.
2. To create a normal or variable constraint, complete the following sub-steps.
   1. Click anywhere in the **Search in <View_name>** box located to the left of the **Search** button.
   2. Under **Add Constraint**, in the constraint type list, select **Normal Constraint** or **Variable Constraint**.
   3. In the **Field** list, select the field to use.
   4. If you selected a composite property from the **Field** list, then select a value from the **Custom Property** list.
   5. In the **Operator** list, select an operator to use in the comparison.
   6. For normal constraints, in the **Value** box, select or type a value. For variable constraints, in the **Value** list, select a value.
   7. Click **Add** to complete the constraint.
   8. Click **Search**. The system returns the appropriate search results.
3. To create a prompted constraint, complete the following sub-steps.
   1. Click anywhere in the **Search in <View_name>** box located to the left of the **Search** button.
   2. Under **Add Constraint**, in the constraint type list, select **Prompted Constraint**.
   3. In the **Field** list, select the field to use.
   4. If you selected a composite property from the **Field** list, then select a value from the **Custom Property** list.
   5. In the **Operator** list, select an operator to use in the comparison.
   6. In the **Message Input** box, type a message to display in the prompt dialog.
   7. Click **Add** to complete the constraint.
   8. Click **Search**.
   9. In the **<Prompt_Name>** dialog box, select or enter the appropriate search value.
   10. Click **OK**. The system returns the appropriate search results.

   See the list below for more search constraint options.

- Constraints that have not been run are outlined with a dashed border.
- To edit a constraint, select the constraint and update the necessary parameters.
- To change from an AND to an OR constraint statement, click **AND**. Click **OR** to change it back to **AND**.
- To use multiple constraints in a single search, click and repeat the steps to create a constraint.
- After you define the search constraints you want to apply, you can group the conditions, reorder the conditions, and save searches performed with the search as a filter. The search evaluates the conditions in the order in which you define them. You can save a multiple condition search as a filter.

Export grid search results

To export grid search results to a CVS file, complete the following steps.

1. To display the list of available items, select a document, folder or workflow view.
2. From the views grid, select the items you want to export.
3. From the toolbar, select **Export Grid**.

Result

The system exports all rows of the grid, whether the entire list is visible on the screen or not.

Create a private filter

A private filter is saved search criteria that is accessible to you. To create a private filter, complete the following steps.

Note that when creating a new private filter, the system does not save column sorting and ordering.

1. In the **Views** pane, select the view you want to use as a basis for your filter.
2. In the right pane, define your quick search or create conditions for a search.
3. If the search returned the results you want, in the **Current View** toolbar, click the **Create New Filter** button. If not, refine your search and then repeat this step.
4. In the **Create Filter** dialog box, type a name and an optional description for the filter and then click **OK**.

   After you save the private filter, it appears below the view you used to create it in the **Views** pane.

Modify or rename a private filter

You can change the name and description of a saved search filter or the conditions associated with the filter. To modify a private filter, complete the following steps.

1. In the **Views** pane, select the view associated with the filter and then select the appropriate filter.
2. In the **Search** box, modify the necessary components of the condition and then click **Save Filter**.

3. Optional. In the **Save Filter** dialog box, in the **Name** and **Description** boxes, update the name and description of the filter.
4. Click **OK**.

Delete a private filter

To delete a saved search filter, complete the following steps.

1. In the **Views** pane, select the view that contains the filter you want to delete and then select the appropriate filter.
2. Click the **Delete Filter** button.
3. In the confirmation dialog box, click **Yes** to confirm the deletion of the filter.

Edit a page label

To edit a page label, complete the following steps.

1. Perform a folder search using available search functionality.
2. In the folder list in the results grid, select the desired folder.
3. Expand sub-folders as necessary and then select the desired page.
4. In the menu bar at the top of the page, select **Edit** .
   The page label will be highlighted.
5. Type the desired page label into the field and then select **Check Mark** to save the page label.

View related folders

The viewer enables you to view related folders according to the relationship criteria defined in the Perceptive Content Management Console. To view the related folders, complete the following steps.

1. In the viewer, select **Show or Hide Related Folders** .
2. In the **Relationship** list, select the relationship you want to view.

   Note: In the Relationship view pane, the list of related folders as per the selected relationship appears.

3. Select any related folder from the list.

   Note: You can view the related folders as per the relationship based on the user privileges set by the administrator.

Show folder content

To toggle between a form centric folder and its content, complete the following steps.

1. To display a list of available folders, select a folder view.
2. In the displayed list, select the folder you want to open. The system displays the form centric folder in the folder viewer.
3. Select **Show Content**. The system displays the folder content in the folder viewer.

View related tasks

To view the related tasks associated to a document or folder, complete the following step.

1. While viewing a document or folder, select **Show or Hide Related Tasks** .

Result Related tasks are displayed in the bottom pane. You can modify the view by selecting a different task view from the list.

Delete a task

You can delete a task associated with a document or folder from the related tasks pane. To delete a task, complete the following steps.

Prerequisite You must have the Task Template>Delete privilege for the associated task template to delete a task.

1. While viewing a document or folder, select **Show or Hide Related Tasks** .

   Related tasks are displayed in the bottom pane. You can modify the view by selecting a different task view from the list.
2. In the bottom pane select the task you want to delete.
3. Select Delete .

About forms

Forms are an optional component of Perceptive Content. Forms are available if your administrator configures them for your use. You administrator specifies which forms are available, including any workflow queues to which they are associated. Depending on your system configuration, you may use the following types of forms.

A form displayed as a stand-alone document or folder

When you open a document or folder, a form appears in the viewer. Depending on your system configuration, each field can map to a corresponding custom property. After you fill in the fields and save the form, the system can automatically populate the values for the corresponding custom properties.

A form displayed as supplemental information for a document or folder

This type of form allows you to capture additional data for your documents or folder. When you open a document or folder, such forms appear in the forms pane. You can select from the available forms and fill in the fields to provide additional information about a document or folder.

Forms configuration properties

You can configure form properties in the `lesrdl-content-forms` section of the *config.json* file. The available properties are listed below.

loadByDefault

Specify whether the first form in the list displays by default when viewing the Forms pane. The default setting is false.

Configure forms pane to load by default

You can specify whether the first form in the list displays by default when viewing the Forms pane. You define the property in the `lesrdl-content-forms` section of the *config.json* file. To define the property, complete the following steps.

1. Go to *[drive:]\Program Files\Apache Software Foundation\Tomcat<version>\webapps\<subdirectory>*.
2. Open the *config.json* file using a text editor.
3. If necessary, add the `lesrdl-content-forms` section to the file.
4. In the `lesrdl-content-forms` section, add the `loadByDefault` property.
5. Under the property name, enter `true` or `false`.

   Example

   ```
   “lesrdl-content-forms”: {

   “loadByDefault”: true
   ```
6. Save the file.

About presentation

A presentation represents a view of the form data based on the privileges defined by your administrator.

A form can have one or more presentations. Each presentation represents a different view of the form data. The first presentation of the form displays by default. You can select the presentation you want to view.

Save a stand-alone form

A stand-alone form appears in the viewer when you open a document or folder. To modify and save a form, complete the following steps.

1. Open the document or folder you want to modify.
2. Optional. If there are multiple presentations, from the drop-down list, select the required presentation.
3. Modify the information in the form.
4. Select **Save**.

Save a form as supplemental information

Forms that provide supplemental information associated with a document or folder appear in the forms pane of the viewer. To modify and save a form that displays supplemental information, complete the following steps.

1. Open the document or folder you want to modify.
2. To display the forms pane, select **Form**.

3. In the forms pane, from the drop-down list, select the form you want to modify.
4. Optional. If there are multiple presentations, from the drop-down list, select the required presentation.
5. Modify the information in the form.
6. Select **Save**.

View a stand-alone form

A stand-alone form appears in the viewer when you open a document or folder. To view a stand-alone form, complete the following steps.

1. Open the document or folder you want to view.
2. Optional. If the form has multiple presentations, from the drop-down list, select the presentation you want to view.

   > **Note:** If the form has only one presentation, the viewer displays that presentation.

View a form as supplemental information

Forms that provide supplemental information associated with a document or folder appear in the forms pane of the viewer. To view a form that displays as supplemental information, complete the following steps.

1. Open the document or folder you want to view.
2. To display the forms pane, select **Form**.
3. In the forms pane, from the drop-down list, select the form you want to view.
4. Optional. If the form has multiple presentations, from the drop-down list, select the presentation you want to view.

   > **Note:** If the form has only one presentation, the forms pane displays that presentation.

5. Optional. If you need more space to view the form, resize the forms pane.

Reset a form

Before you save a form, you can reset the form to display the last saved data of that form. To clear the data in a form and revert to the last saved data, complete the following steps.

1. In the forms pane, select .
2. Select **Reset**.

View folder properties

Folder properties define information that is specific to a folder. A folder can have folder properties and custom properties. To view the properties of a folder, complete the following steps.

1. Open the folder.
2. In the viewer, select **Show or Hide Folder Properties**to show or hide the folder and custom properties.

> **Note:** You can edit the custom properties of any folder based on the user privileges set by the administrator. The administrator defines the custom properties of a folder.

Edit folder properties

To change a folder property value for a folder, complete the following steps.

1. Open the folder.
2. Select **Information** to show or hide the properties.
3. In the **Properties** pane under **Folders Properties**, update any of the following values.
   - In the **Name** box, type a new name for the folder.
   - In the **Path** box, complete the following actions.
     - Select .
     - Optional. In the **Select a Location** dialog box, select the appropriate drawer from the **Filter by:** list.
     - Select **Search** and then select the new location from the results.
     - Select **OK**.
   - From the **Type** list, select the new type for the folder.
4. To ensure the values are saved to the item, select **Save**.

> **Note:** On a mobile device, some functions such as **Save** are grouped under an ellipsis.

Edit custom or composite property data

To change a custom property or composite property value for an item, complete the following steps.

1. Open the item.
2. Select **Information** to show or hide the properties.
3. In the **Properties** pane under **Custom Properties**, type or select a value in the property.

4. Optional. To add a new composite property row or set, select **Add**.
5. Optional. To remove a composite property row or set, select **Remove**.
6. Optional. To reorder the listing of composite properties you can drag and drop the row or set.
7. To ensure the values are saved to the item, select **Save**.

> **Note:** On a mobile device, some functions such as **Save** are grouped under an ellipsis ⋮ .