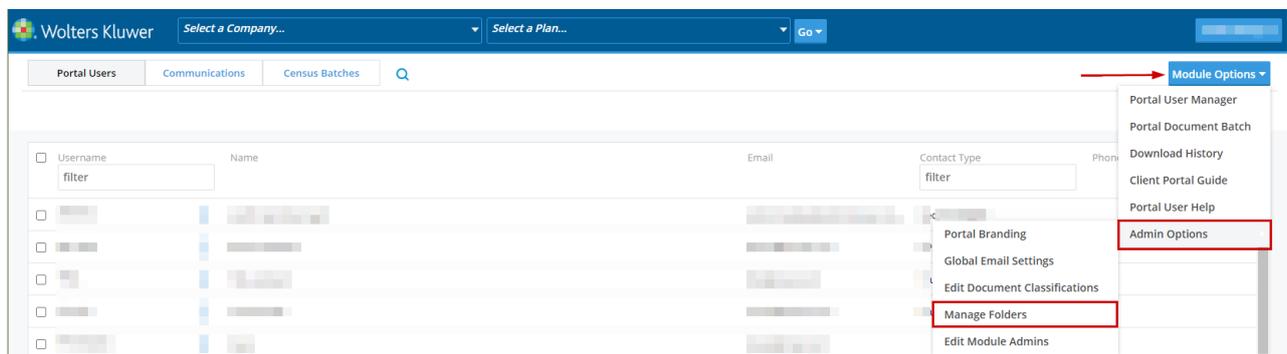


How to Delete Folder Names Associated with Portal Communications

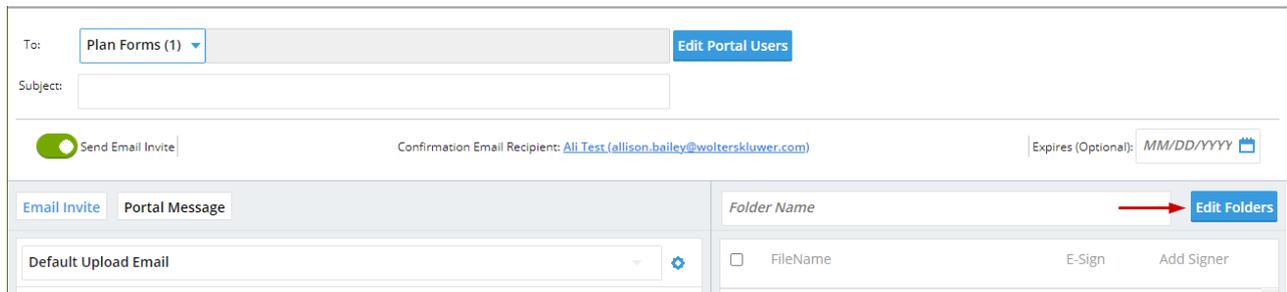
08/01/2024 11:41 am CDT

To delete document folders, you must be the Master Admin User or a Designated Admin. With these designations you may access the folder options through the following paths:

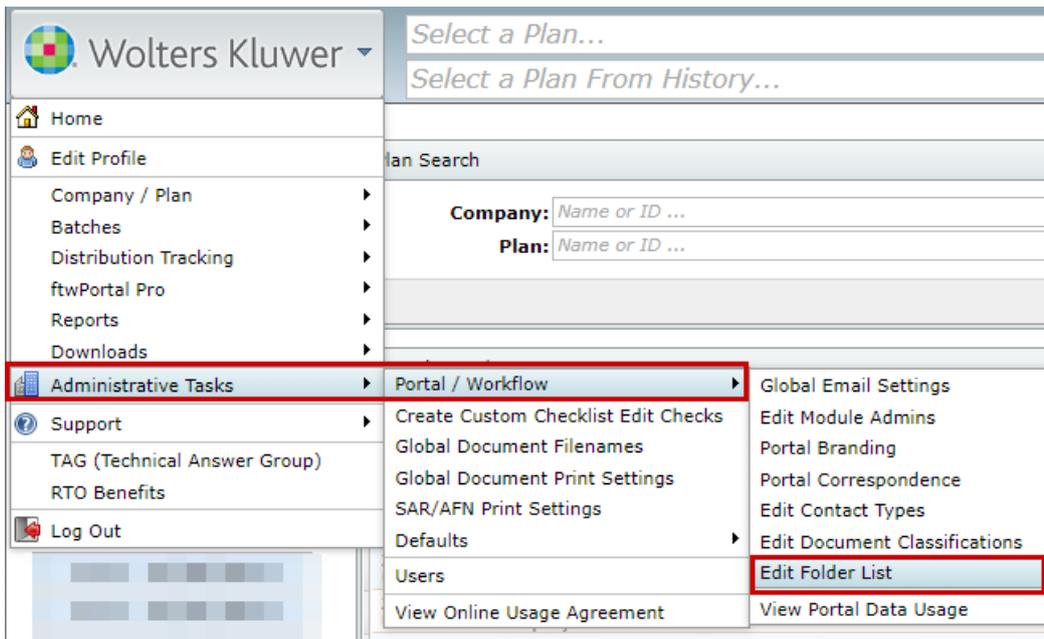
1. From the Global/Plan dashboard select the Module Options button in the upper right-hand corner. The 'Manage Folder' option is within the 'Admin Options' dropdown:



2. From within a new communication (other than a Direct Message):



3. From within the Wolters Kluwer Menu, select Administrative Tasks> Portal/Workflow> Edit Folder List:



After clicking on "Edit Folders" or "Edit Folder List", a list of folder names will appear in a pop-up. Select the checkbox for the desired folders to delete and click on "Delete Folders". The pop-up box will update with the text "Changes Saved". *

Please Note- Once removed, a folder can not be restored, any documents within the folders will be moved to display as a loose documents within the Portal Users view.

