ShareSecure Folder Management: User Guide

Introduction

ShareSecure's folder system allows you to efficiently organize documents within workspaces. This guide covers everything you need to know about creating, managing, and optimizing your folder structure.

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1. Navigating the Folder Structure

Folder Panel

- Located on the left side of your workspace
- Displays a collapsible/expandable tree structure
- Click on any folder to display its contents in the main panel

Navigation Features

- **Search**: Use the search box above the folder tree to quickly locate specific folders
- **Expand/Collapse**: Click the arrow icons to expand or collapse folder trees
- **Selection**: Currently selected folder appears highlighted

2. Creating and Managing Folders

Creating a New Folder

1. Right-click on the parent folder where you want to add a subfolder
2. Select **'New Folder'** from the context menu
3. Enter a name for the new folder and press **Enter**

Renaming a Folder

1. Right-click on the folder you want to rename
2. Select **'Rename'** from the context menu
3. Enter the new name and press **Enter**

Deleting a Folder

1. Right-click on the folder you want to delete
2. Select **'Delete'** from the context menu
3. Confirm the deletion when prompted

Note: Folders containing documents or subfolders cannot be deleted until emptied

3. Uploading Documents to Folders

Standard Upload

1. Right-click on your target folder
2. Select **'File Upload'** from the context menu
3. Browse your device and select files
4. Click **'Upload'** to begin the process
5. Monitor upload progress in the status indicator

Drag-and-Drop Upload

1. Open the folder where you want to upload in ShareSecure
2. Open the folder containing your files on your computer
3. Select files or entire folders from your computer
4. Drag them directly into the ShareSecure window
5. The folder hierarchy will be automatically preserved

Bulk Upload Features

- Multiple files can be selected simultaneously
- Entire folder structures can be uploaded with hierarchy intact
- Supported file types include PDFs, Office documents, images, and more
- Maximum file size: 2GB per file

4. Managing Folder Access

Setting Access Permissions

1. Right-click on a folder
2. Select **'Manage Access'** from the context menu
3. The Access Control panel will appear

Permission Options

- **Add Users/Groups**: Type names in the search field
- **Permission Levels**: Choose between View, Edit, or Admin access

- **Inheritance**: All documents and subfolders inherit parent folder permissions by default
- **Override Options**: Enable "Override inherited permissions" to set unique access

Reviewing Current Access

- The "Current Access" section displays all users and groups with access
- Icons indicate permission level (View, Edit, Admin)

5. Viewing and Managing Documents

Document View

- Documents appear in the right panel when a folder is selected
- View displays document name, type, size, upload date, and categories

Document Management

- **Sort**: Click column headers to sort by name, date, size, etc.
- **Filter**: Use the filter options to narrow document display
- **Search**: Search within the current folder using the search bar

Document Actions
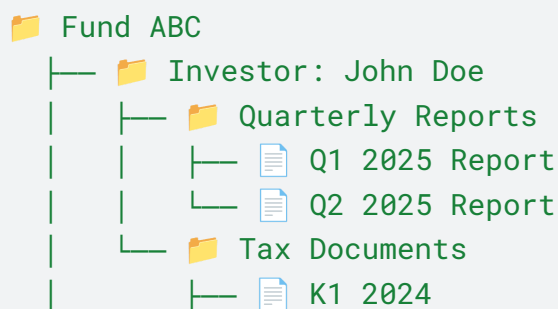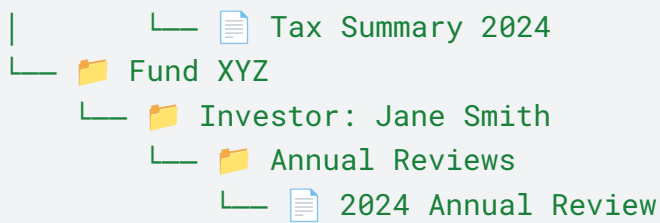
- Click a document to select it
- Use the action bar for common tasks (Download, View, Share)
- Right-click for additional context menu options

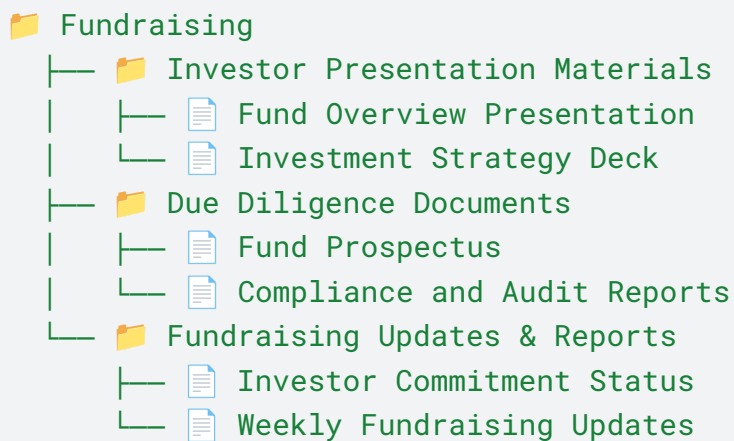# 6. Example Folder Structures

Investor Relations Structure

```
None
📂 Fund ABC
├── 📂 Investor: John Doe
│   ├── 📂 Quarterly Reports
│   │   ├── 📄 Q1 2025 Report
│   │   └── 📄 Q2 2025 Report
│   └── 📂 Tax Documents
│       ├── 📄 K1 2024
```

```
|              └── 📄 Tax Summary 2024
└── 📁 Fund XYZ
       └── 📁 Investor: Jane Smith
              └── 📁 Annual Reviews
                     └── 📄 2024 Annual Review
```

Fundraising Structure

```
None
📁 Fundraising
├── 📁 Investor Presentation Materials
│      ├── 📄 Fund Overview Presentation
│      └── 📄 Investment Strategy Deck
├── 📁 Due Diligence Documents
│      ├── 📄 Fund Prospectus
│      └── 📄 Compliance and Audit Reports
└── 📁 Fundraising Updates & Reports
       ├── 📄 Investor Commitment Status
       └── 📄 Weekly Fundraising Updates
```

7. Important Considerations

- **Permission Inheritance**: All documents and subfolders automatically inherit access permissions from parent folders
- **Deletion Requirements**: Folders must be empty before deletion
- **Categories/Tags**: Use categories to improve document searchability across the system
- **Global View**: Access "All Documents" view for a workspace-wide document list

8. Best Practices

- **Consistent Naming**: Use clear, consistent naming conventions for folders and documents
- **Structured Hierarchy**: Create a logical folder structure that mirrors your business processes

- **Regular Access Review**: Periodically audit folder permissions to ensure appropriate access
- **Bulk Operations**: Utilize drag-and-drop for efficient organization of multiple files
- **Search Optimization**: Use meaningful document names and categories to improve searchability
- **Avoid Duplication**: Create links to documents rather than storing multiple