How to Move Documents

Folder to Folder:

- 1. On the user's menu panel, click the Document Management
- 2. Open Document Manager
- Select and open an existing document
 Select the document/s, then click the Move button. Move Documents screen will open.

ave Close								
Documents								
Source		Documents				Properties Pr	eview	
Source	Contract	Add + Move ± Downlo	ad 🗙 Delete Export • 🔡 View •	Filter (F3)	К.Я. 21 У.	Name	Contract-232.pdf	
Record No	232	Name 🖑	Date Size	Туре	User			
		Contract-232.pdf	6/23/2017, 4:0 58.55 Kb	application/pdf	George M Olney			
🗅 Print	ted	Contract-232.pdf	6/23/2017, 4:2 58.55 Kb	application/pdf	George M Olney			
		Contract-232.pdf	6/23/2017, 5:0 58.55 Kb	application/pdf	Steve Palm			

5. Select the document, then select a different folder

Move Documents Save Close								□ ×
Move (2)			Select Sour	ce		Properties Pre	view 3	
Name	Date	User	Source	Contract		Name	Contract-232	
Contract-232.pdf	06/23/2017	George M Olney	Record No	232	~	BOL Number	* 01	
Contract-232.pdf	06/23/2017	George M Olney	Select Fold	er		Vessel	* V01	
			Folders			Voyage	* V01	
			V 🗅 Con	tract 2		BOL Date	11/07/2018	
				Contract print				
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				New Folder				
			> 🗅 Logi	stics				
			🗅 Clair	ns				
			🗅 Prin	ted				
			🗅 Acco	ounts payable				
			🗅 Acco	ounts receivables				
			🗅 Risk	Management				
				-				

- 6. If the folder is associated with Document Type, required fields should also be filled.
- 7. Click the Save button once done.

Record to Record:

- 1. On the user's menu panel, click the Document Management
- 2. Open Document Manager
- Select and open an existing document
 Select the document/s, then click the Move button. Move Documents screen will open.

Document Manage									×
Documents									
Source		Documents					Properties Pre	view	
Source Cont	tract		X Delete Export •	B View -	ilter (F3)	К.Я. И У	Name	Contract-232.pdf	
Record No 232	~	Name U	Date	Size	Туре	User			
		Contract-232.pdf	6/23/2017, 4:0	58.55 Kb	application/pdf	George M Olney			
Printed		Contract-232.pdf	6/23/2017, 4:2	58.55 Kb	application/pdf	George M Olney			
		Contract-232.pdf	6/23/2017, 5:0	58.55 Kb	application/pdf	Steve Palm			

5. Select the document, then select a different Record No. and folder

Move (2)			Select Sour	rce	Properties P	review	
lame	Date	User	Source	Contract	Name		4
ontract-232.pdf	06/23/2017	George M Olney	Record No	232 🗸	BOL Number	★ 01	-
ontract-232.pdf	06/23/2017	George M Olney	Select Fold	er	Vessel	* V01	
			Folders		Voyage	* V01	
			V 🗅 Cont	tract	BOL Date	11/07/2018	
				Contract print			
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			D	New Folder			
			> 🗅 Logi	stics			
			🗅 Clair	ns			
			🗅 Print	ted			
			🗅 Acco	ounts payable			
			🗅 Acco	ounts receivables			
			Co. Diek	Management			

- 6. If the folder is associated with Document Type, required fields should also be filled.7. Click the Save button once done.