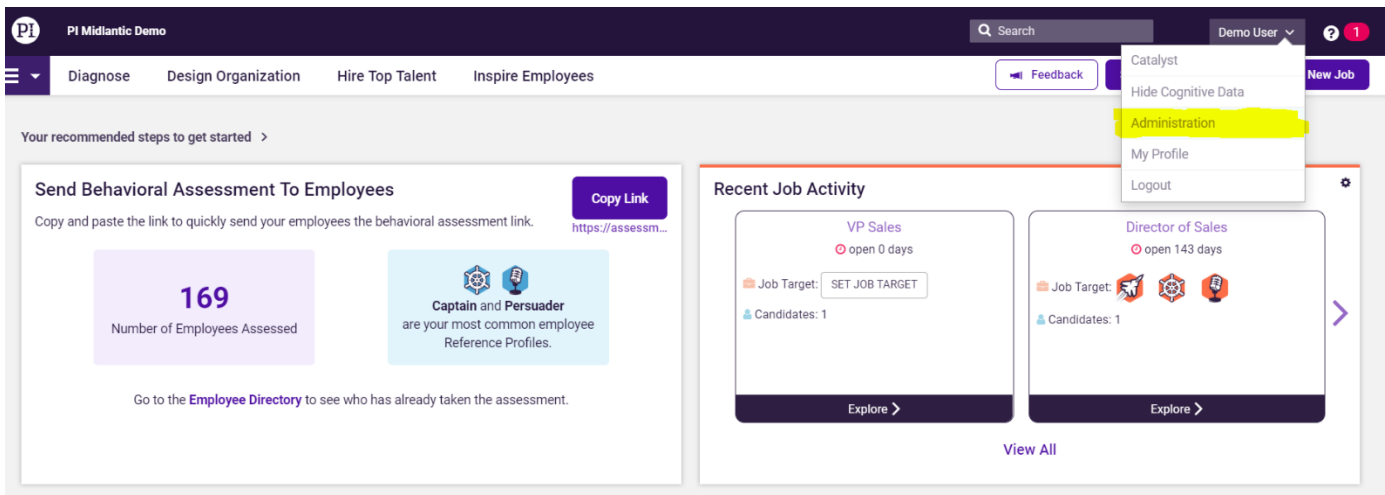


Creating Folders

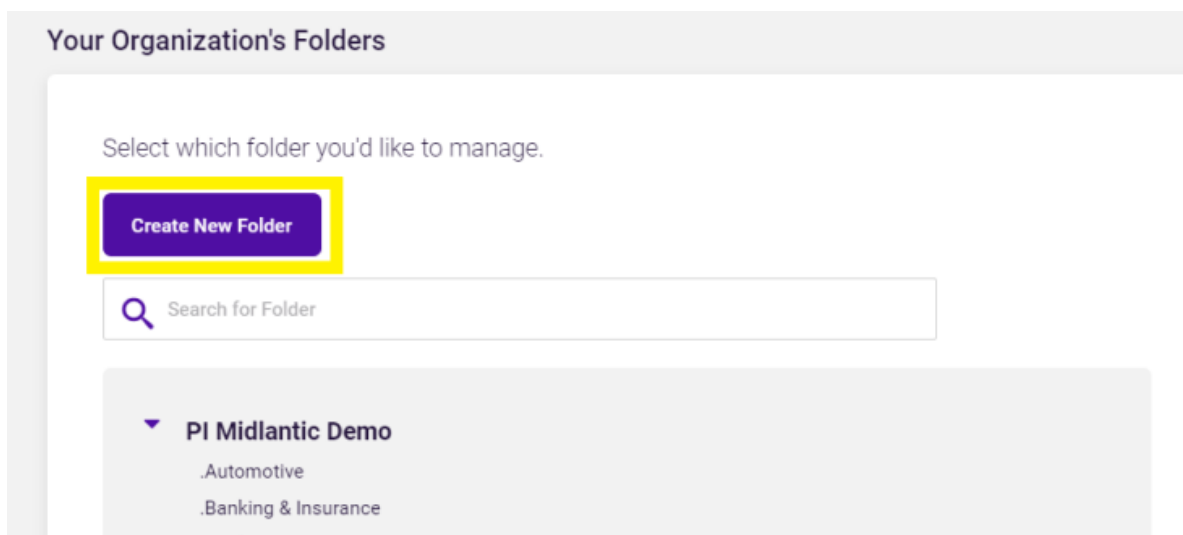
Account Owners and Account Admins have inherited access to all folders and their contents in the software. However, Power Users, Users, and Read-Only users only have access to the folders (and their contents) if granted access. Below is a guide to grant folder access.

There are two separate features in Administration regarding folders. Default Folder in User Management relates to which folder assessments are saved to by that user. Folder Management allows you to enable users access to specific folders so they can see specific assessments. As of 6/18/2020 - new software users will be given automatic access to the default folder selected by the Account Admin/Owner when the user is created. The below article will outline the differences between these two features.

- 1) **Log in to the PI software at app.predictiveindex.com. Click on your name in the top right hand corner and select “Administration”.**



- 2) **Click on the “Folder Management Tab”, and select “Create New Folder”.**



3) Name the folder & Select "Save". *Optional: You can select specific users with access as well as move records from this page or you can do that later on.*


Add New Folder

Folder Path

\PI Midlantic Demo x

Folder Name

Folder Contents

 Add person, group or job to store in this folder

Users with Access

 'Who would you like to have access to this folder?'

Save

Cancel

4) Once entered, hit "Save"

Folder Path

\PI Midlantic Demo x

Folder Name

.Automotive

Folder Contents

🔍 Add person, group or job to store in this folder

View and manage current contents

Users with Access

🔍 'Who would you like to have access to this folder?'

Demo User (demouser@pimidlantic.com) x

Save

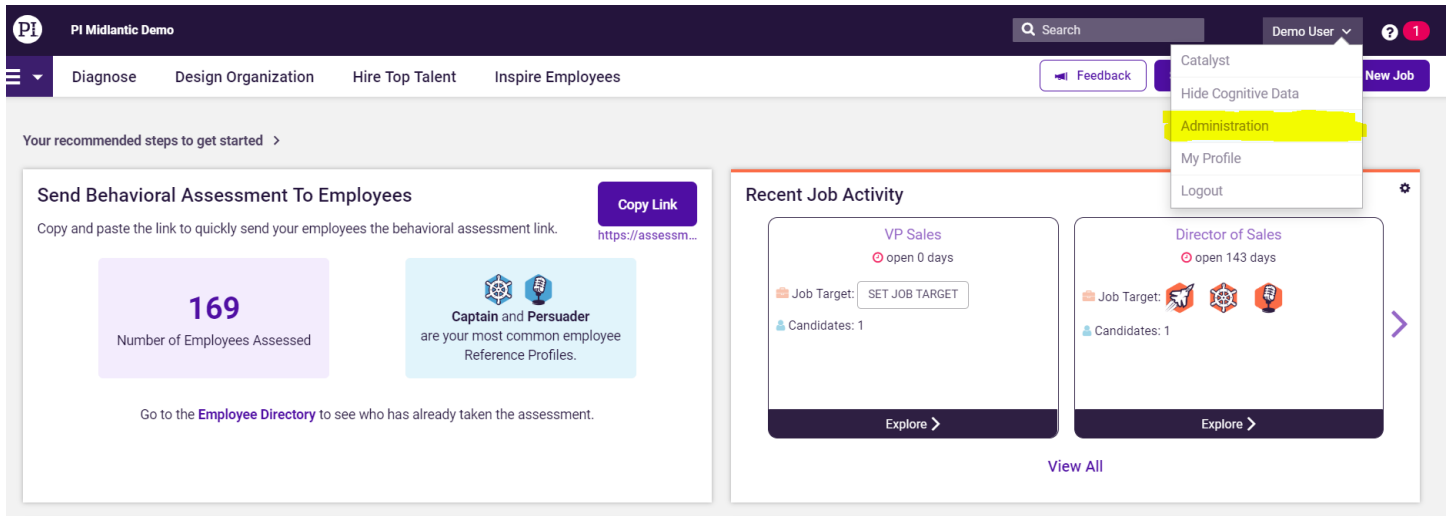
Cancel

Granting Folder Access

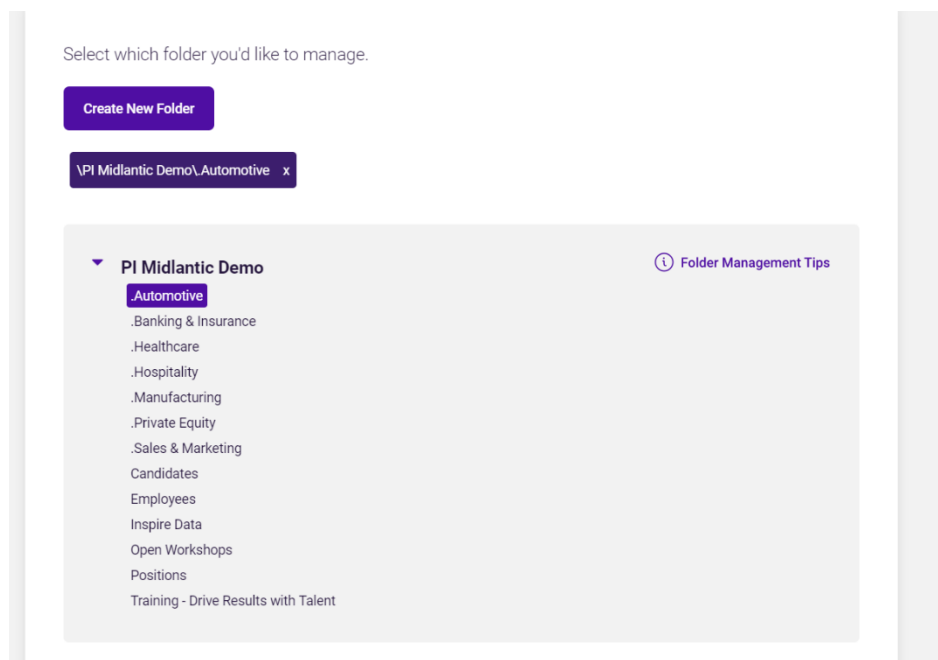
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- 1) **Log in to the PI software at app.predictiveindex.com. Click on your name in the top right hand corner and select "Administration".**



2) Click on the “Folder Management Tab”, and select the folder which you would like to grant access for.



3) Once selected, enter the name of the Power User/User/Read-Only User that you would like to give folder access to in the “Users with Access” Field.

Folder Details

Delete Folder

Folder Path

\PI Midlantic Demo x

Folder Name

.Automotive

Folder Contents

🔍 Add person, group or job to store in this folder

[View and manage current contents](#)

Users with Access

🔍 Who would you like to have access to this folder?

Demo User (demouser@pimidlantic.com)

Save

Cancel

4) Once entered, hit "Save"

Folder Path

\PI Midlantic Demo x

Folder Name

.Automotive

Folder Contents

🔍 Add person, group or job to store in this folder

[View and manage current contents](#)

Users with Access

🔍 Who would you like to have access to this folder?

Demo User (demouser@pimidlantic.com) x

Save

Cancel