How to create a folder and add documents to a folder

Any member of a team has the ability to create a folder and place documents in that folder or into an already existing folder. This feature lets you provide documents for team members to open and download in the Team Documents section of your folder.

Your files will appear in a table that is easy to view and you can quickly sort what order documents appear.

Step 1

Go into the team space and click the *Add a Folder* button.

Step 2

On the next screen, type the name of the folder in the **Title** field.

You can describe the purpose of the folder or instructions for team members in the **Folder Description** field. Or leave that space blank.

You also can use the description section like a mini web page to provide text, images, and links above the files.

Step 3

The **Team Documents** section is where you will create your table of documents to link within the folder. Start by clicking the *Add new Team Document* button. Select a file from your computer to upload it to this folder.

Use the **Friendly Label** to display a clear title for your file. For example, if your file name is dd0204-sectionreport, you can use Friendly Label to show the file as February 4, 2024 Section Report. Use **File Description** to offer even more detail. These fields are optional and the site will simply display the file name if you leave these fields blank. Click *Create Team Document* to save the file to your folder.
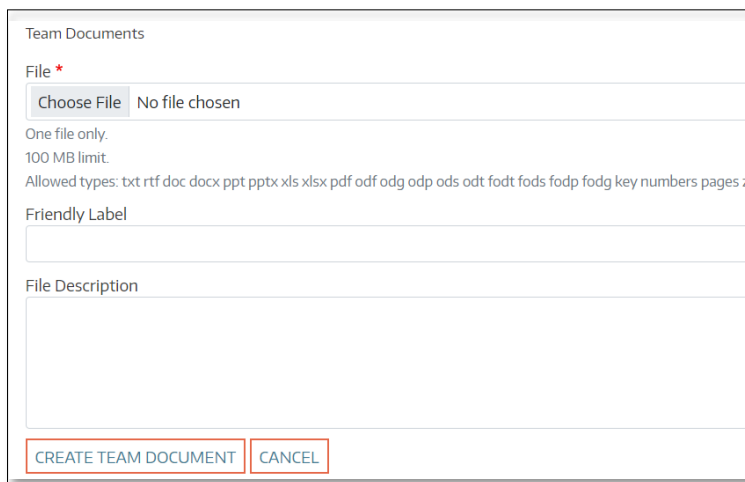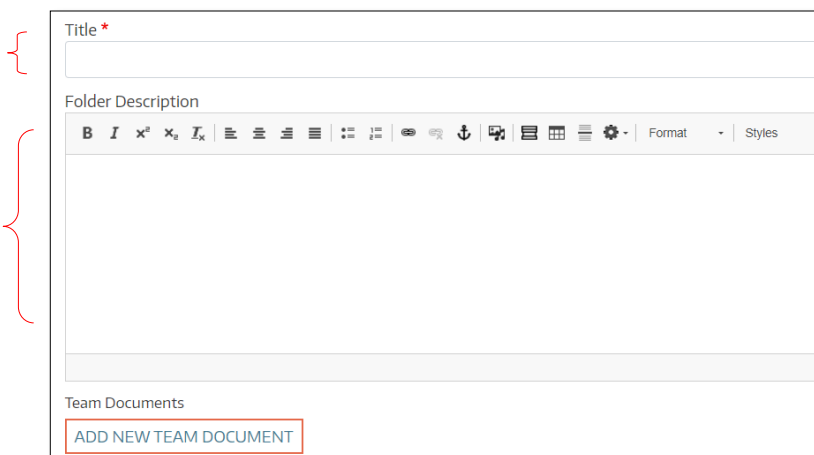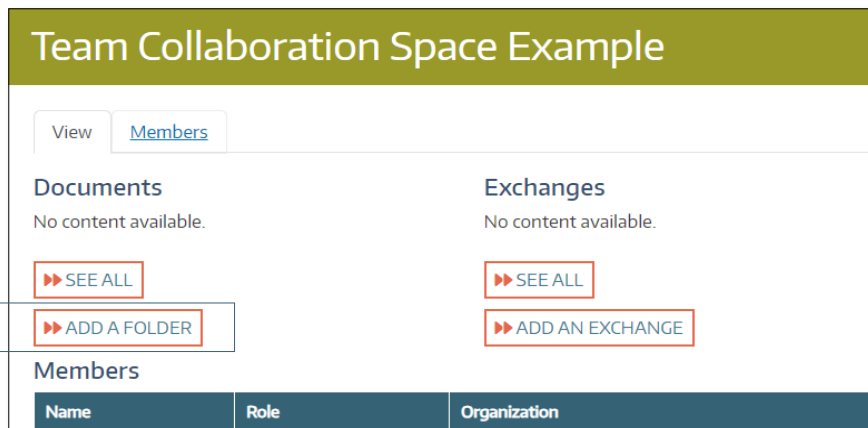
Important New Rules for File Names

Before uploading a document to WA Portal, follow these protocols for how to name a file:
- Avoid using spaces (dashes and underscores are OK)
- Avoid using symbols such as &, @, or quotation marks

Too vague: MeetingAgenda

Best: 081923PublicHealthCouncilAgenda or 081923phcagenda