

Find your way around Folio

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Folio has five tabs along the top. This guide walks through each one so you know where to go for what you need.

1

Start in Files

Files shows your folders down the left, under **All files**, and what's in the folder you're looking at on the right. Anything waiting for you, such as a request to approve, appears under **Needs you** at the top.

2

Read a record's row

Each record shows when it was filed, its class, the date it's **Kept until** and how it's protected. Type in the box above the list to find something in that folder by name.

3

Open a record

Click a record's name to see its details, how long it's kept, and its **Receipt**, **History** and **Nib** tabs. Click **Open the document** to read it in the page, or **Download** to save a copy.

4

Search across everything

Search looks through the names of your records and the words inside them, in every folder at once.

5

Check Approvals, Ledger and Settings

Approvals holds the changes waiting for a second person. **Ledger** lists everything that has happened to your records. **Settings** is where admins choose how long records are kept and which folders are protected.

What the labels mean

- **RETAINED**: kept until its date, and deleting it early needs two administrators.
- **LOCKED**: no one can delete it before its date.
- **ARCHIVED**: kept in the archive, so it has to be restored before you can open it.
- **PROTECTED**: a folder where opening anything needs a reason.

Why you might not see a tab

Each tab only shows for people who can use it. Viewers can see records but not open them, and the Ledger is for auditors, admins and owners. If you need more, an admin can [change what you can do](#).