

Client Training HQ

Adding and Deleting Report Folders

If you have Immigration Case Management (ICM) Administrative privileges, you can manage report folders via the Administrative Settings.

Accessing Report Folders

To view your report folders:

1. From the ICM dashboard, click **your username** displayed in the upper right.
2. Select **Administrative Settings** from the drop-down menu.
3. Click the **Choice Lists** tab.
4. Select **Report Folders** from the drop-down menu next to **Choice Lists** in the center.

Adding a Report Folder

To add a folder:

1. Enter the desired folder name in the blank center field.
2. Click **Add Custom Type**.

The new folder will be added for use within the Reports module.

Deleting a Report Folder

To delete a folder:

1. Click to highlight the folder you want to delete in the right column.
2. Click **Remove Type**.

Note: Administrators cannot remove custom folders that contain reports. Reports must be moved to a different location before deleting the report folder.

More Training Available!

Check out additional training resources available on our site, [Connections](#).

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.