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# FOLDERS GUIDE

Checkpoint Folders helps you organise, manage and share your research. This includes the ability to save searches, documents and snippets, and includes the ability to share folders and content with other people within your organisation. Folders is located in the top orange Tool bar.

**Note:** Only documents are shared. Your annotations are unique to you and cannot be viewed by others.

## FOLDERS

In Folders you can view and manage all folders and the associated contents:

1. **My Quick Links** – This folder lists your Quick Links and enables you to view and edit items.
2. **My Cleardocs Documents** – This folder links to your Cleardocs account where you can access your Cleardocs documents
3. **Folders** – This folder lists your personal folders and enables you to view and manage your folders and saved documents and/or searches
4. **My Shared Folders** – This folder list folders that have been shared with you by other people in your organisation
5. **Recycle Bin** – This folder holds documents and searches you no longer need until you permanently delete them.

Note: Documents can only be permanently deleted from the Recycle Bin.

### 1. MY QUICK LINKS

The screenshot shows the 'Folders' interface. On the left, a sidebar lists folders: 'My Quick Links' (highlighted with a red box '1'), 'My Cleardocs Documents', 'Folders', 'List of annotated documents', and 'Recycle Bin'. At the top of the sidebar are 'New', 'Rename', and 'Share' buttons. The main content area is titled 'Folders' and contains a 'Quick Links' table. The table has columns for 'TITLE', 'CONTENT TYPE', and 'CLIENT ID'. The first row is '★ TEMPLATE LIST' (with a red box '2'), 'Link', and 'Unassigned'. To the right of 'Unassigned' are three icons: a gear (with a red box '3'), a plus sign, and a red 'X' (with a red box '4'). The other rows are '★ LONG SERVICE LEAVE REFERENCE GUIDES', '★ QUICK FACTS - TERMINATION', and '★ PAYROLL ASSISTANCE SERVICE', all with 'Link' content type and 'Unassigned' client ID, and each with gear, plus, and red 'X' icons.

TITLE	CONTENT TYPE	CLIENT ID
★ TEMPLATE LIST	Link	Unassigned
★ LONG SERVICE LEAVE REFERENCE GUIDES	Link	Unassigned
★ QUICK FACTS - TERMINATION	Link	Unassigned
★ PAYROLL ASSISTANCE SERVICE	Link	Unassigned

**1. Open your Quick Link Folder**

To manage your Quick Links, click on My Quick Links folder. Your saved Quick Links will be displayed in the right hand pane. **Note:** Your Quick Links are also automatically displayed and updated in the Quick Links portlet on the Homepage.

**2. View your Quick Link**

To view the content of your Quick Link click on the title hyperlink

**3. Edit a Quick Link**

To edit your Quick Link click on the pencil icon

**4. Delete a Quick Link**

To delete your Quick Link click on the X icon

**2. MY CLEARDOCS DOCUMENTS**

This folder links to your Cleardocs account where you can access your Cleardocs documents. Cleardocs provides an automated document creation process for your Australian company, SMSF, trust and estate planning needs. The document creation process is simple to follow and the Cleardocs legal documents are written in plain language.

Collapse/Expand All				
ID	Matter (Client)	Created	Status	Options
<b>Unit Trust - non-fixed</b>				
378076	123456 (Marion Randall)	19/01/2015	Pending	More
<b>Change of Trustee Unit Trust</b>				
392467	12345 (xyz)	14/04/2015	Pending	More

**3. FOLDERS**

**Folders** are your personal folders where documents and searches are stored. It also provides a number of options for managing these items including the ability to create and rename folders, move items to other folders and to the recycle bin. When you save research in your folders, it is stored for the life of your subscription.

**Tip:** Organising your folders and contents with meaningful names is important as this will allow you to quickly and efficiently locate and access your research.



New

**Create a New Folder**

You can create and name folders and sub folders in which you wish to store your documents and searches.

1. Go to Folders
2. From the left hand pane select the folder under which you want the new folder to be located
3. Click on the New Folder icon
4. Type a folder name and click the **Create Folder** button
5. Then Click OK to confirm

The new folder will be created and appear immediately on the left hand pane and main screen

**Saving a Search to Folders**

1. Conduct a search
2. From the Search Results page click the save icon located above the search results.
3. The Folders pop up will appear
4. Choose a **My Searches** folder location, create subfolder or new folder
5. Edit the search name if required
6. Click Save button then click OK

**Note:** If you have Contributor rights of a shared folder, you can also save searches to that folder.

**Saving a document to Folders from a Search Results list**

1. Conduct a search
2. From the Search Results list click Select All to clear selection and then place a tick next to the required document/s
3. Click Save selected documents to Folders icon in the main Tool bar
4. Choose a folder location, or create a new folder
5. Edit the document title if required
6. Click Save button then click OK

**Note:** If you have Contributor rights of a shared folder, you can also save searches to that folder.

**Saving a document to Folders from Document Level**

1. Navigate to a document via the Table of Contents or by selecting a document from the search results list.
2. Click Save this document to Folders icon in the main Tool bar
3. Choose a folder location, or create a new folder
4. Edit the document title if required
5. Click Save button then OK

**Note:** If you have Contributor rights of a shared folder, you can also save documents to that folder.

**Rename a Folder**

You can edit and rename folders you have created from the Folders page.

1. Go to Folders
2. In the left hand pane select the folder you wish to edit
3. Click on the **Rename** icon
4. Type in a new name and click the **Rename** button
5. Then Click OK to confirm

**Note:** The renamed new folder will appear immediately in the left hand pane and main screen.

**Document Delivery**

You can Print, Download, or E-mail documents saved to Folders

1. Go to Folders and select a folder
2. Tick the checkbox beside the item(s) name. You can choose one or multiple items to output at one time
3. Select Print, Download or E-mail icons
4. Select the Output options then click **OK**

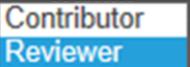
**Note:** Only documents can be included in delivery options, saved searches is not an option.

If you select a folder all items including sub folders will be included in the request. A maximum of 50 documents can be included at one time.

**4. SHARED FOLDERS**

You have the ability to share folders and the associated sub folders with other people within your organisation and to view folders that have been shared with you. **Note:** The names listed in the Contacts will only be users within your organisation who have been issued with a Checkpoint Username & Password or who have personalised their IP Access.

To add or remove names, please contact Customer Support on [supportANZ@thomsonreuters.com](mailto:supportANZ@thomsonreuters.com)


**Share Permissions**

There are 2 permission levels that can be assigned when sharing folders: Reviewer and Contributor.

1. Reviewer – A reviewer can only view and read documents
2. Contributor – A contributor can review, save documents and save searches to the shared folder


**Contacts**

Contacts allows you to create groups of contacts within your organisation for the purpose of folder sharing.


**Share your Folders**

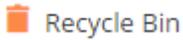
1. To add a new contact to share your folders, go to **Folders** and select the folder in the left hand pane
2. Click on the Share icon
3. The My Contacts window will open
4. The default is for contacts to have access to folders and any sub folders. If the selected folder has sub folders and you don't wish to grant access, untick the 'Apply to subfolders' checkbox.
5. To add a new contact(s) click on the **Add Members** button
6. In the Contacts list select the contact to add. You can search for a contact by entering their name in the 'Search by name...' field
7. Alternatively, in the Groups list select the group to add. You can search for a group by entering the name in the 'Search by group...' field
8. Selected contacts and/or groups will be added to the Group Members list
9. Click **Save & Close** button to exit
10. On the Folder Sharing screen, select the permission level for the newly added contact and/or group
11. Click the **Close** button
12. The Folder icon will now be updated to indicate this folder has been shared

**5. RECYCLE BIN**

This Folder holds documents and searches you no longer need until you permanently delete them. **Note:** Documents can only be permanently deleted from the Recycle Bin.

**Move Folder or Item to Recycle Bin**

1. To delete a folder and/or item, tick the checkbox beside the item name. You can choose one or multiple items to move at one time
2. Click on the **Recycle Bin** icon
3. Then Click OK to confirm. The selected items will now appear in the **Recycle Bin** folder

**Recycle Bin****Restore Folder or Item from Recycle Bin**

1. To restore a folder and/or item back into Folders, select the **Recycle Bin** folder in the left hand pane
2. Tick the checkbox beside the item name. You can choose one or multiple items to move at one time
3. Expand the Manage list and select **Restore to Folder** option
4. Select a folder location and click the **Restore to folder** button
5. Then Click OK to confirm. The selected item(s) will be moved to the new folder location

**Delete Folder or Item from Recycle Bin**

1. To permanently delete a folder and/or item, select the folder in the left hand pane
2. In the main screen, tick the checkbox beside the item name. You can choose one or multiple items to move at one time
3. Expand the Manage list and select Delete option
4. The selected item will be permanently deleted

**Note:** Items cannot be accessed from the recycle bin. You will need to move a document or search from the recycle bin to another folder if you wish to access it.