Checkpoint
Create and Use Folders

Organise, manage, and share your research by storing documents, searches, and snippets of text into folders that you create.
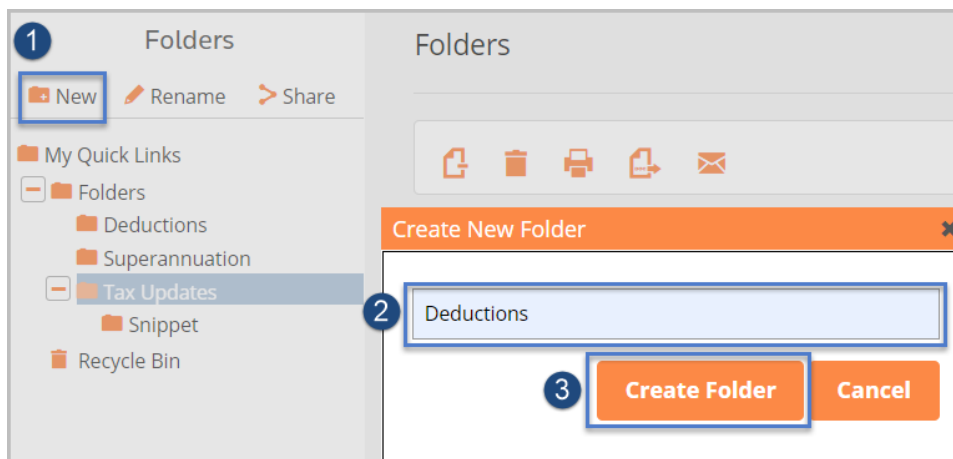
Accessing Folders

Folders can be accessed by clicking the **Folders** menu option from the orange toolbar.

⊘ History   ⚙ Preferences   ⚠ Alerts   ▪ **Folders**   👥 Contacts   👤 Client ID

Create a Folder from the Folders Page

1. Select **New** from the Folders window panel
2. Enter a folder name and click **Create Folder** button
3. Folder will appear in the Folder listing

To create a sub-folder from the Folders page

1. Select the folder that you want to add the sub-folder to
2. Click **New** from the Folders window panel
3. Enter a name for the sub-folder and click **Create Folder**
4. Sub Folder will appear in the folders listing

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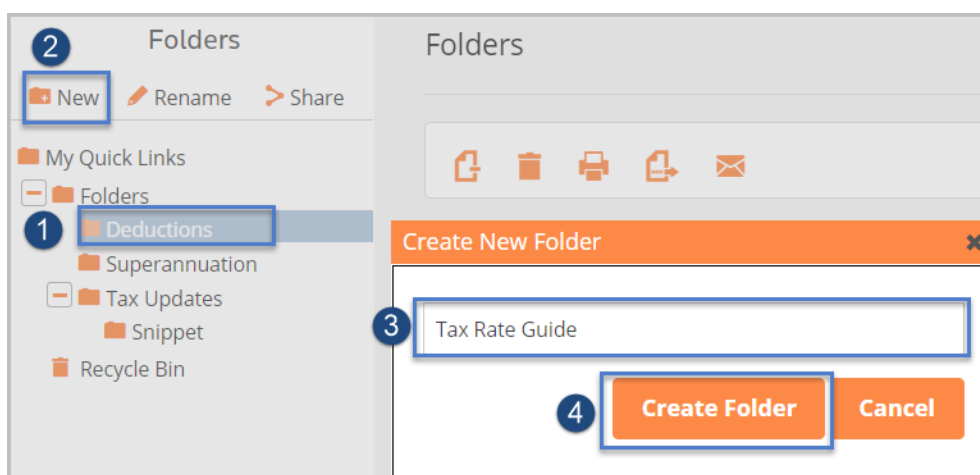
Save a Document into a Folder

1. Open a document and click **Save** icon from the white tool bar
2. Choose a folder location
3. Edit the document title if required
4. Click **Save** button then **OK** to confirm
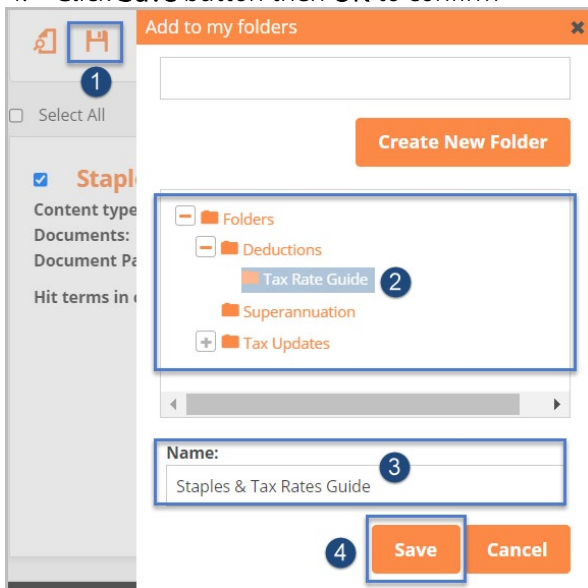
Save a Document from a Search Result(s) into a Folder

1. Enter a keyword and select the **Search** button
2. Click **Select All** to clear selection
3. Select the required document(s) to save
4. Click **Save** from the white tool bar
5. Choose a folder location, or **create a new folder**
   Note: to create a sub-folder, first select the folder from the list where you want the sub-folder to appear
6. Click **Save** button then click **OK** to confirm
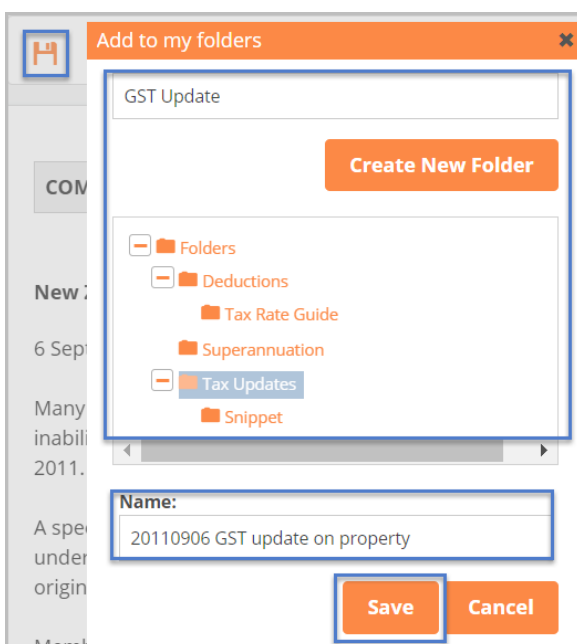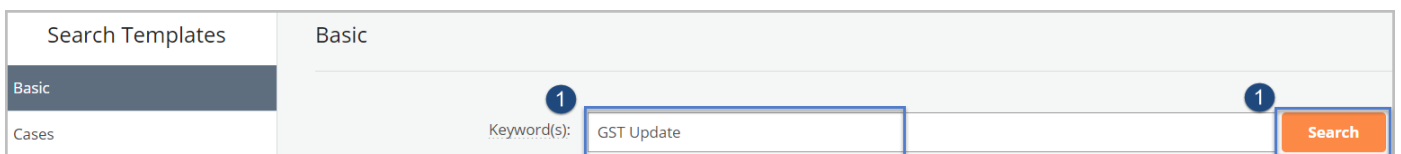
Save A Search to a Folder

1. Enter a keyword and select the **Search** button
2. Select the document to save and click the **Save Search to My Folders** icon from the left window panel
3. Choose a folder location, or **Create a new folder or subfolder**
   Note: to create a sub-folder, first select the folder from the list where you want the sub-folder to appear
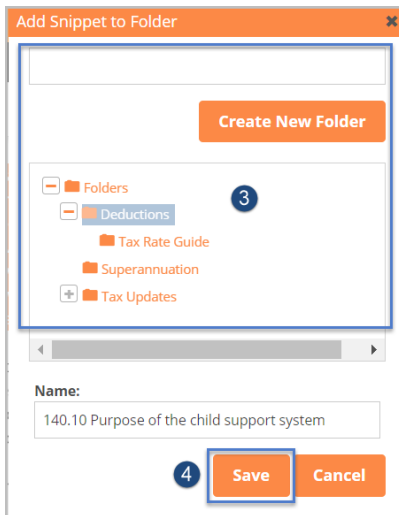4. Click **Save** button then click **OK** to confirm

Save Selected Text to a Folder

You can save a section of selected text as a 'Snippet' in your folders.

1. Highlight the text you want to save
2. Select **Add Snippet** from the pop-up options
3. Choose a folder location, or **Create a new folder or subfolder**
   Note: to create a sub-folder, first select the folder from the list where you want the sub-folder to appear
4. Click **Save** button then click **OK** to confirm

View Saved Content

1. Select **Folders** from the orange menu toolbar
2. Select a folder from the left window panel.
   Note: The content saved in the folder will be displayed on the main page.
3. Click on a link to view a saved document or run a saved search
4. To print/export or email a document(s), select the required documents, and click on the preferred delivery icon.