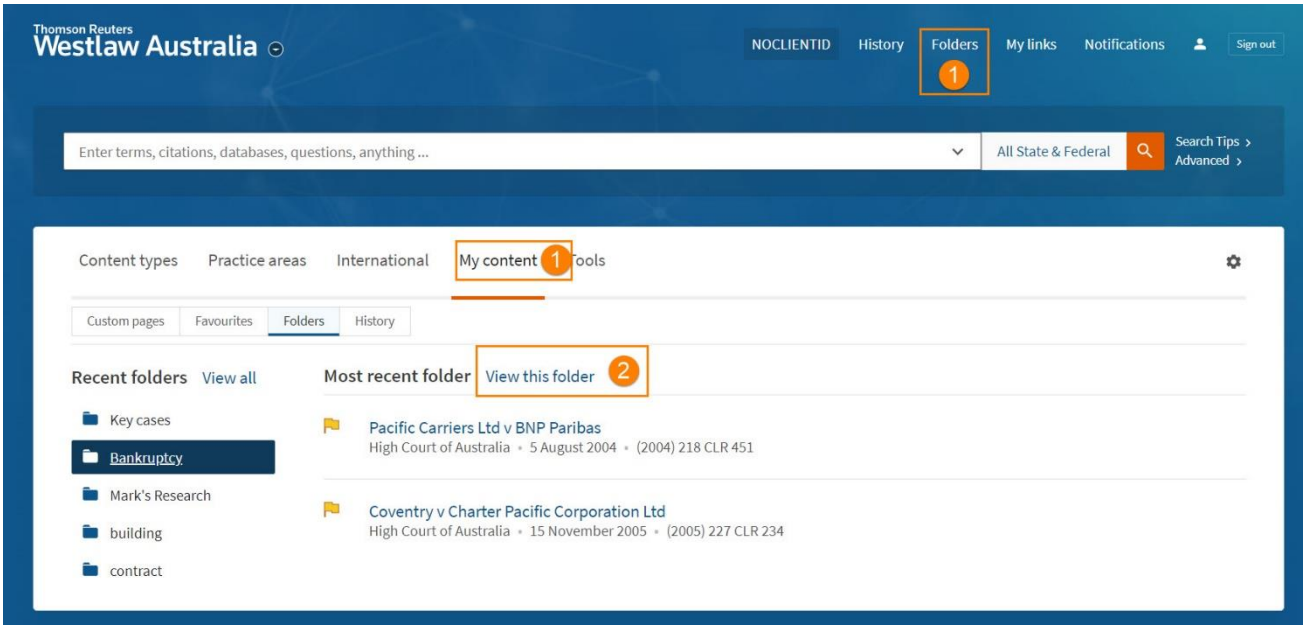
Using and sharing folders

Learn how to organise and manage your research by storing documents and snippets in folders and sharing them with colleagues.

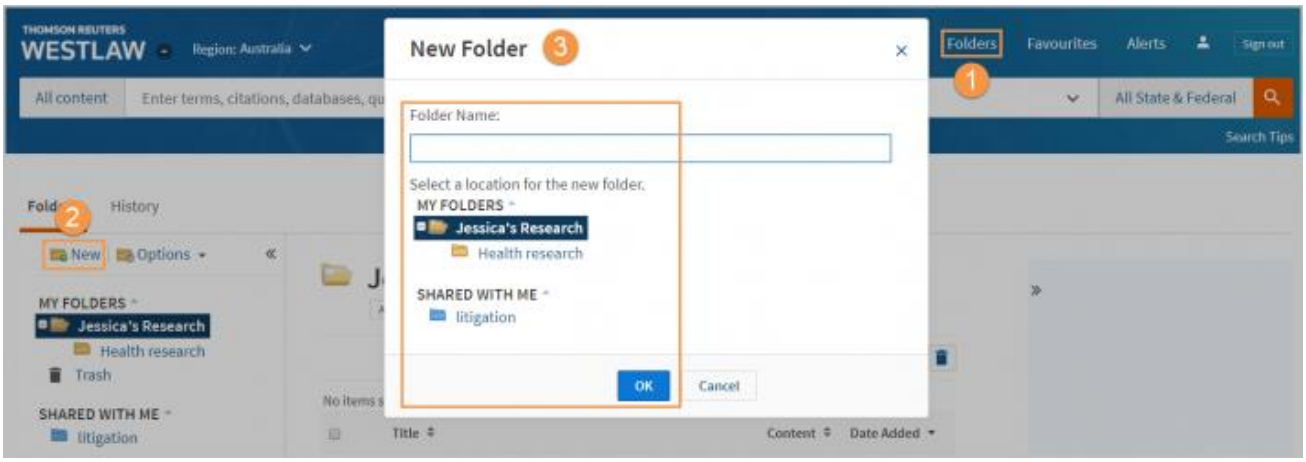
Accessing your folders

1. Click on **Folders** in the top menu or click on My Content tab and then the folders subtab in the browsing menu in the middle of the screen.
2. Select **View this folder** to display all content in saved in a particular folder.



Creating a folder from the Folders page

1. Access Folders from the top menu.
2. Select New in the left-hand panel to create a new folder
3. Enter a name for the folder, select a location, and click OK.



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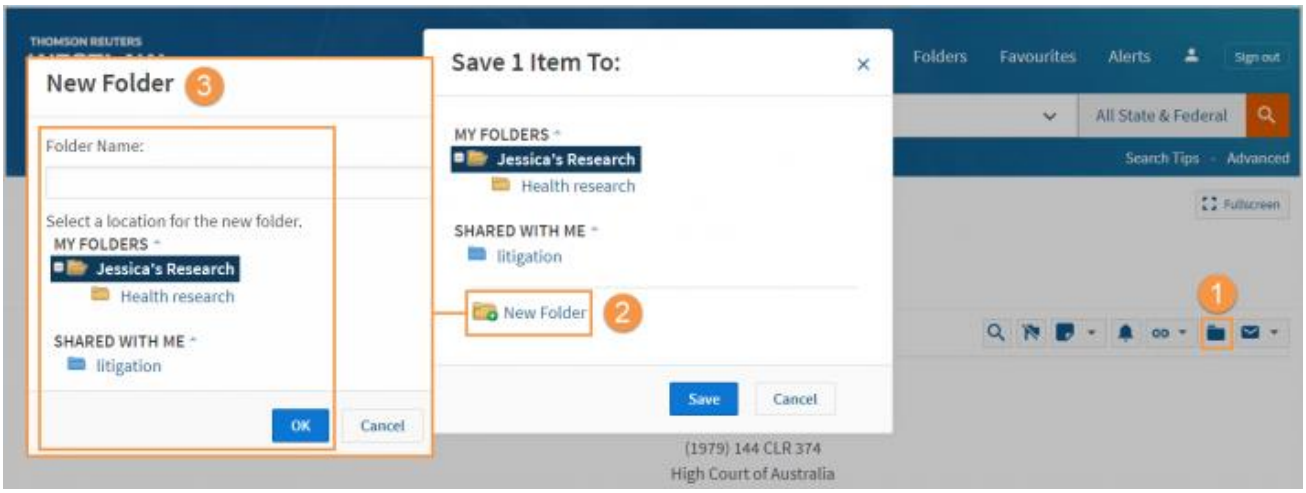
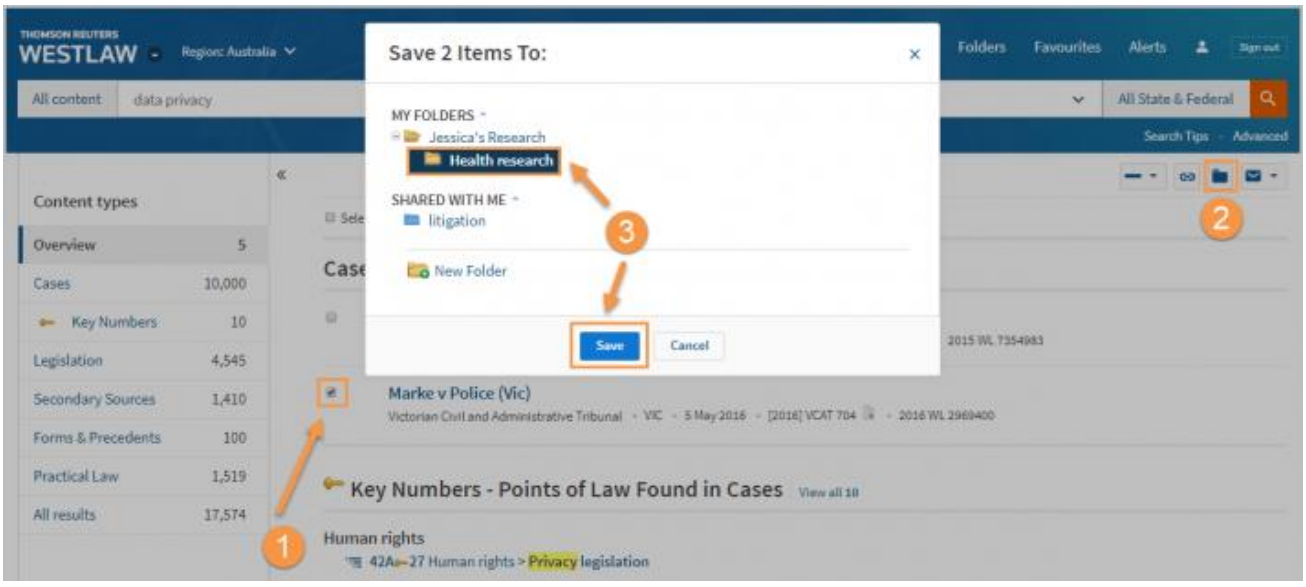
Creating a folder from a document or search results list

1. Select the **Save to Folder** icon.
2. In the pop-up window, click **New Folder**.
3. Enter a name for the new folder, select a location, and click **OK**.



Saving documents from search results into a folder

1. Select the check boxes next to the documents you want to save.
2. Click the **Save to Folder** icon.
3. Select the folder you want to save the documents and click **Save**. A confirmation message displays on the screen.



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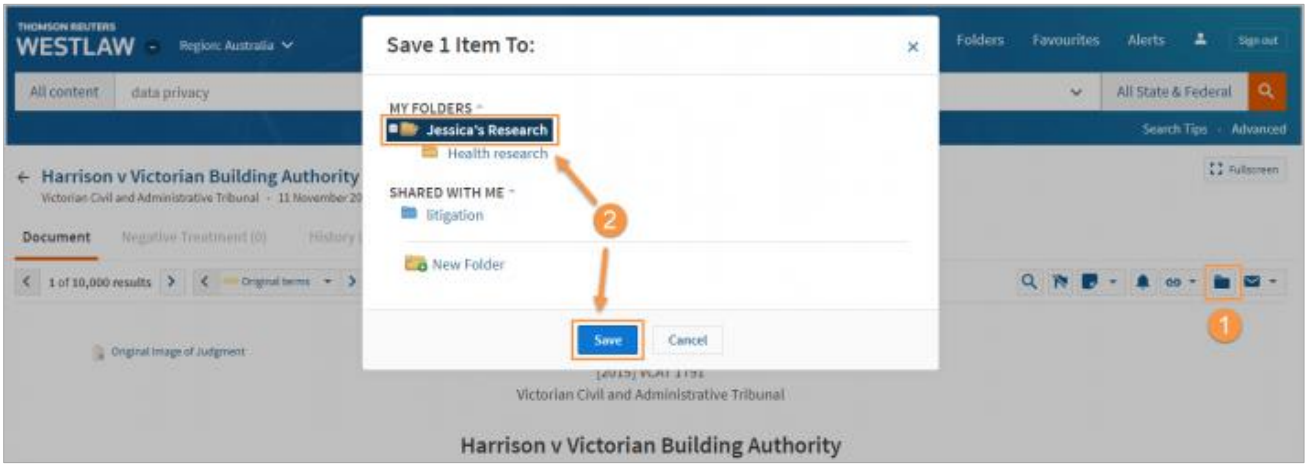
Saving the document you are viewing

1. From within the document, click the **Save to Folder** icon.
2. Select the folder in which you want to save the documents and click **Save**. A confirmation message is displayed.



Saving snippets into folders

A snippet is a section of text, such as a quotation, commentary extract or a clause from a precedent. You can save a snippet instead of a whole document into a folder. Details of the document where the snippet came from are also referenced in the folder.

1. To save a snippet into a folder, highlight the text you want to save by clicking and dragging with your cursor.
2. Choose **Save to Folder** from the pop-up menu.
3. Select the folder into which you want to save the snippet.

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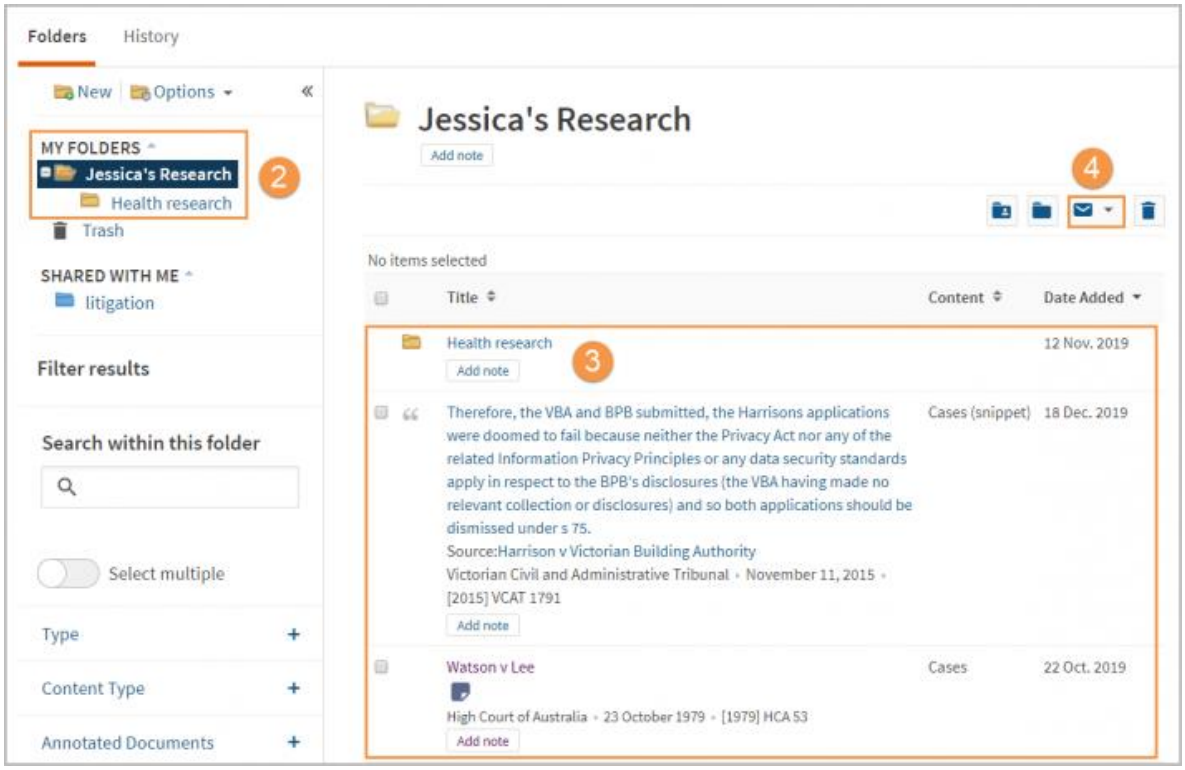
Viewing documents and text in a folder

1. To view documents or text in folders, click **Folders** from the top menu and then **View All**.

2. Click the folder containing the items you want to view.
3. A list of your saved documents and text is displayed in the right column.
4. To email, print, or download documents, tick the checkbox beside the item(s) name, and click the delivery tools icon to choose your preferred delivery method.



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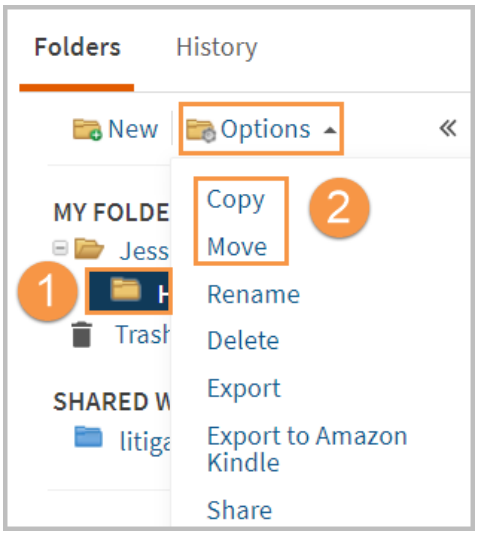
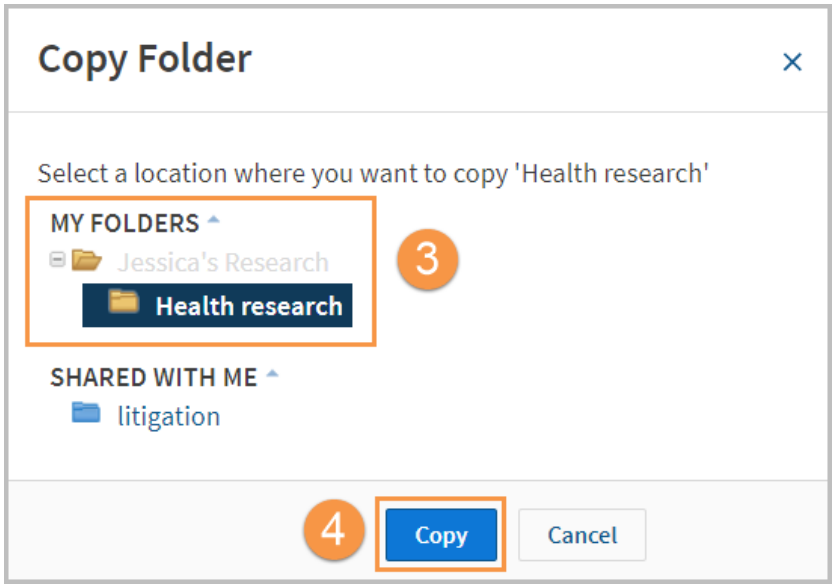
Moving or copying a folder

1. Select the folder you want to move or copy in the **My Folders** list on the left.
2. Select **Options** and choose **Move** or **Copy** from the drop-down menu.



3. The **Copy Folder** or **Move Folder** options to copy or move folders.
4. Click **Move** or **Copy**. A message will confirm the action has been completed.



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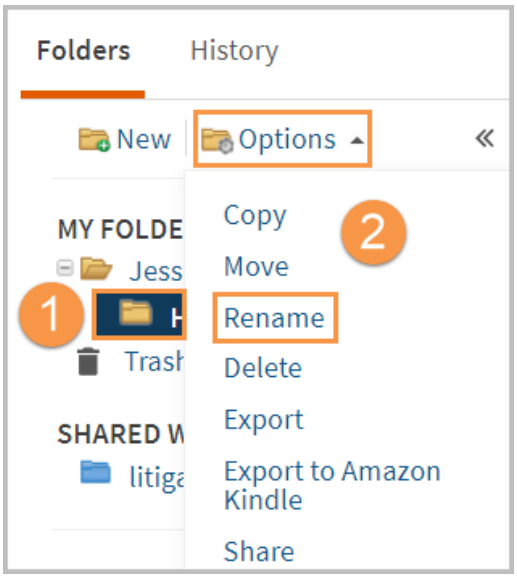
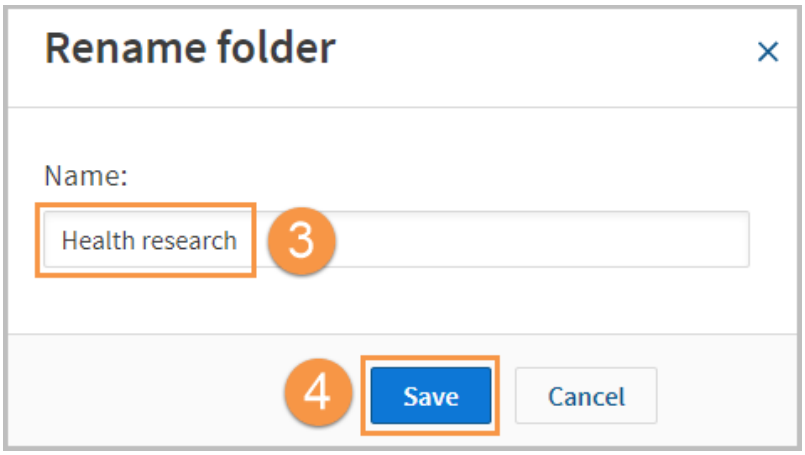
Renaming a folder

1. Select the folder in the My Folders list on the left.
2. Click Options and select Rename from the drop-down menu.



3. The Rename Folder window will display where you can change the folder's name.
4. Click the **Save** button.



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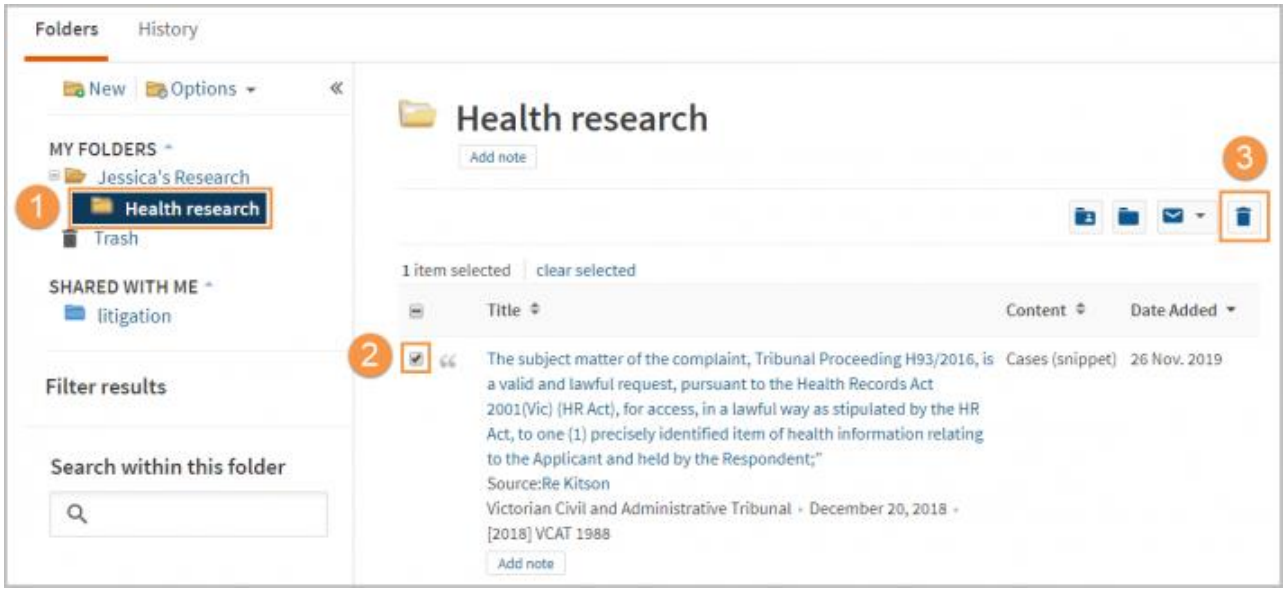
Deleting items from folders

You can delete folders or selected items in a folder. Deleted items are moved to the Trash folder, which are automatically deleted after 30 days.

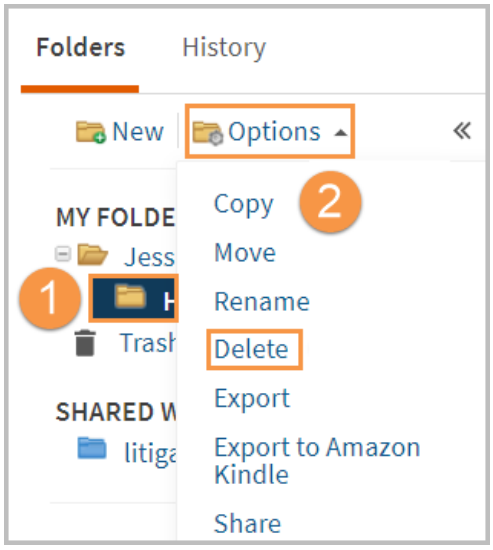
1. Access the folder in the My Folders list on the left.
2. To delete an item, tick the checkbox next to the item(s) names.
   You can select one at a time or delete all by selecting the check box in the table header.
3. Click the **Delete icon** on the top-right.



Deleting a folder

Note: Your primary folder (i.e., *[your name's] Research*) cannot be deleted.

1. Select the folder in the My Folders list.
2. Click Options and select **Delete** from the drop-down menu.



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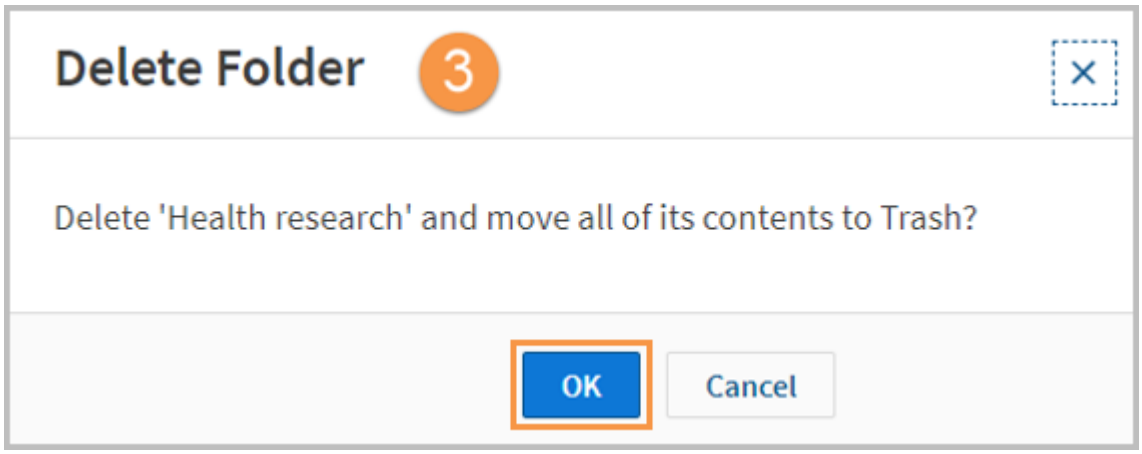
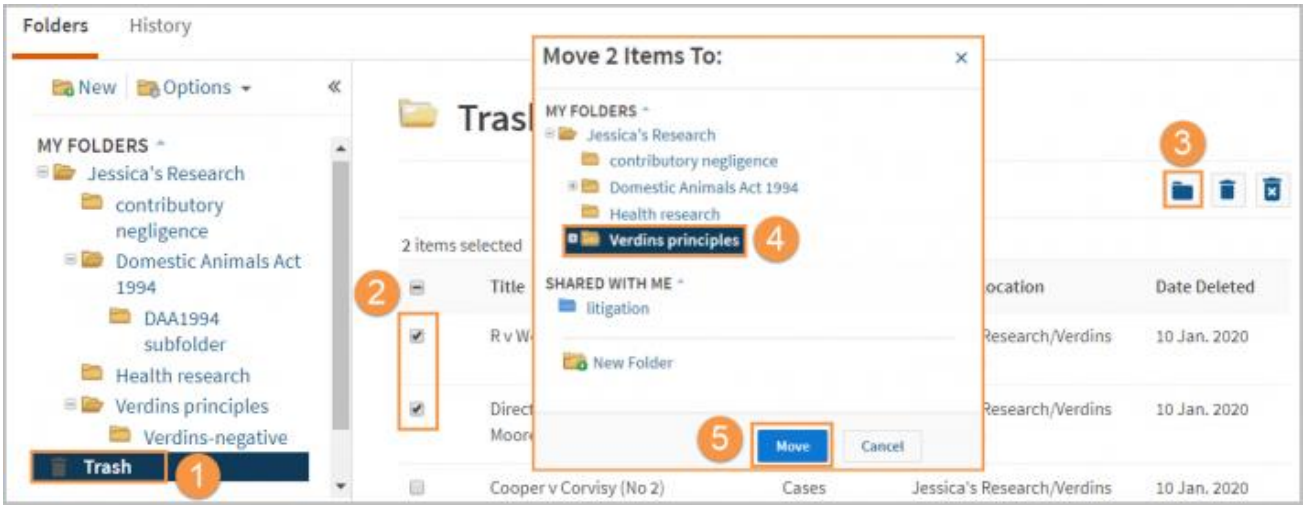
3. The Delete Folder will be displayed; click **OK** to delete the folder.



Moving items from Trash into a folder

1. To restore a folder or item into My Folders, select the Trash icon on the left of the screen.
2. Tick the checkbox beside the item(s) to restore.
3. Click the Folder icon.
4. Select the folder to return the content to. The selected item(s) will be restored to the new folder location.
5. Click on the Move button to complete the action.



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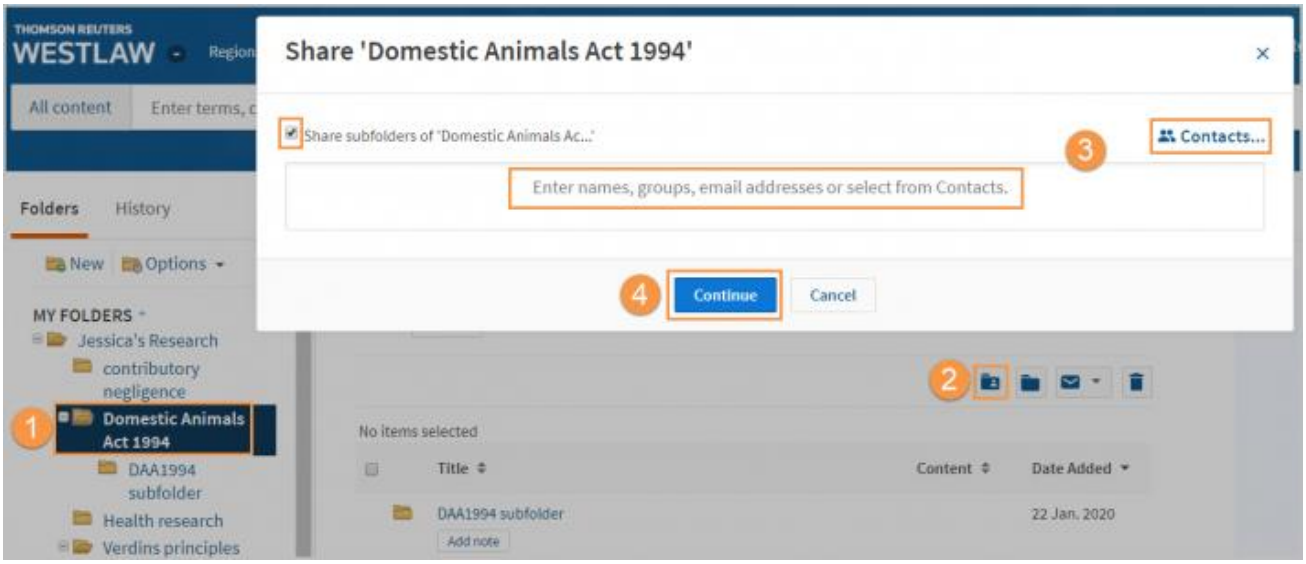
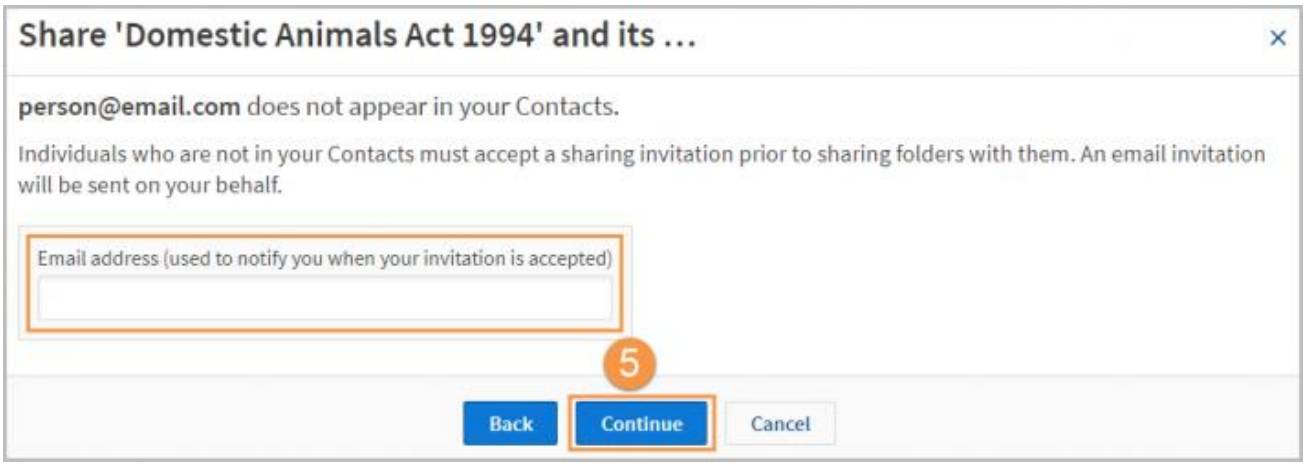
Sharing folders

Sharing your research with colleagues is an efficient method of working with others. Share your folders, sub-folders and associated items with others within and outside your organisation.

1. In the Folders menu on the left-hand panel, click the folder you want to share.
2. Select the **Share Folder** icon. If the folder has sub-folders that you do not want to share, untick the 'Apply to sub-folders' check box.
3. Enter the names, group, or email addresses manually or find in Contacts.
4. Click Continue.



5. If an added email address is not in your contacts, you will receive a notice that they need to accept a sharing invitation before the folder can be shared.
   Add your email address and click **Continue**.



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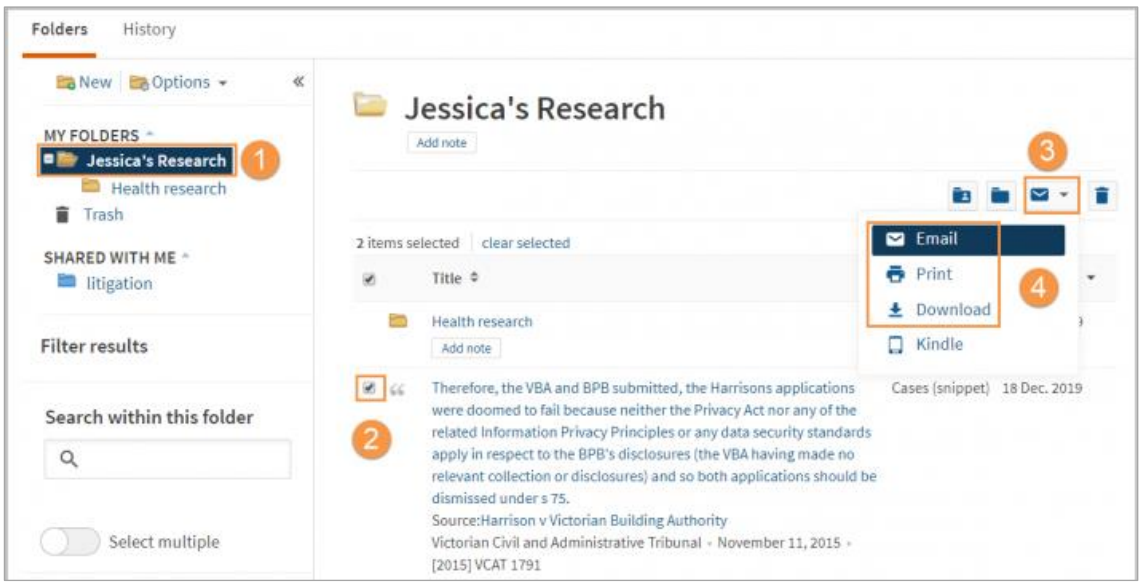
6. Choose a role for the people you are sharing your folder with:
   - Reviewer – View and download documents.
   - Contributor – Reviewer access, add/delete own documents, create sub-folders.
   - Owner – Contributor access, manage folder access, delete documents and folders.
7. Delete people or groups from the list with the X next to their name.
8. Once you have chosen the appropriate roles and the list is correct, click **Share.**

Document Delivery: email, print or download folders

1. Select the appropriate folder in the left-hand Folders panel.
2. Tick the check boxes next to the items you want to email, print, or download.
3. Select the document delivery icon.
4. Choose email, print, or download.



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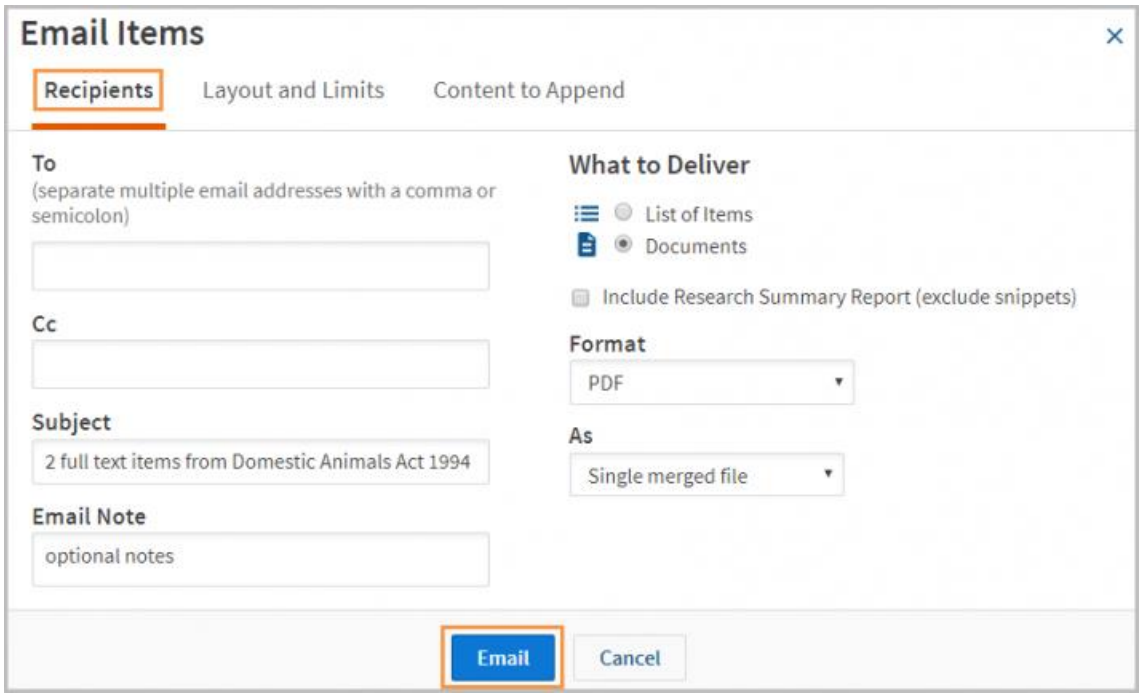
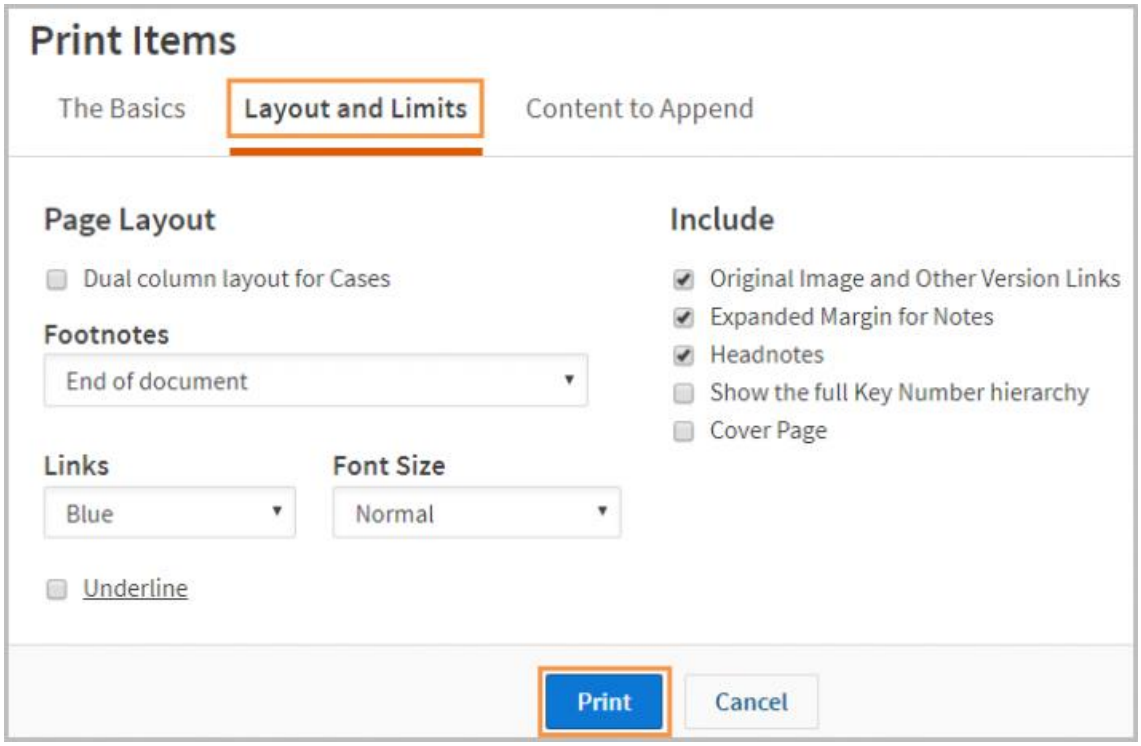
- **Email:** add email addresses, choose what to deliver (Recipients tab), change the layout (Layout and Limits tab), and add references (Content to Append tab), then click Email.



- **Print:** choose what to deliver (The Basics tab), change the layout (Layout and Limits tab), and add references (Content to Append tab), then click Print.



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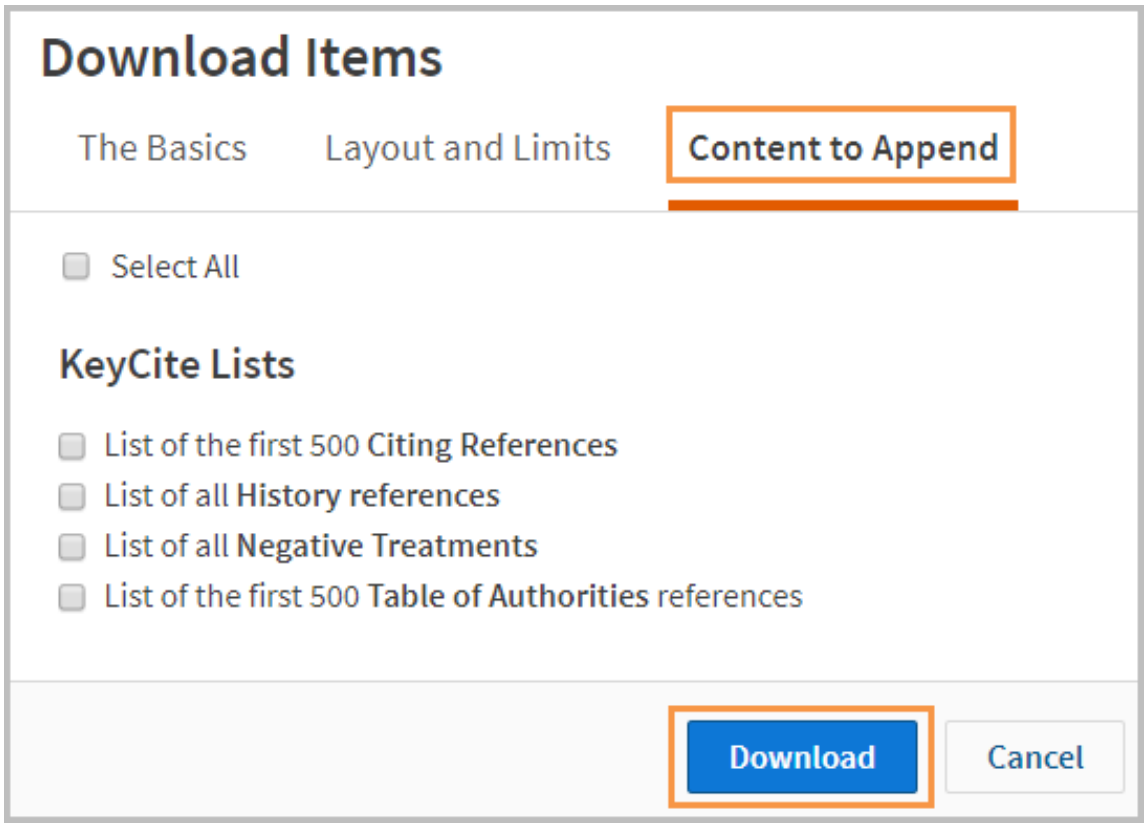
- **Download:** choose what to deliver, the format and as a single file or zipped folder (The Basics tab), change the layout (Layouts and Limits tab), and add references (Content to Append tab), then click Download.



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