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Work Folders: Quick Reference

Stay on the same page without duplicating efforts when you save, annotate and share research documents, searches, and more with colleagues, clients and stakeholders.

▶ **WATCH THE SHORT VIDEO**

SAVING RESEARCH

Save a full-text document:

Select ⌵ from the delivery icons. Choose a folder.

Save selected document text:

1. Highlight text in a full-text document.
2. Choose **Add to Folder**. Follow steps.

Save results documents or results list:

1. Select checkboxes next to documents you want to save.
2. Select ⌵ and choose a folder.

(Each folder can have up to 2,000 documents.)

Save a search request for later:

1. Select the **Actions** link next to the search request on the result screen.
2. Choose **Add search to Folder**.

ANNOTATING DOCUMENTS

Annotate a full-text document:

Highlight text in a full-text document.

1. Select **Annotate**.
2. Add notes.
3. Click **Annotate**.

Save the document to a Folder.

WORKING IN FOLDERS

Go to your folders:

Choose the **More** drop-down link in the black bar at the top of the screen. Click **Folders**.

Create a folder:

In Folders, click the **Create New Folder** button.

Name your folder. Click **Create**.

Working in specific folders:

Select a folder name from the left-pane list.

Once in a folder you can:

- Deliver, share, move, copy or delete items like documents, text or searches.
- **Add Notes** to the folder.
- Open documents; add notes or annotations.

Share a folder

1. Select a folder and click **Actions** next to the folder name.
2. Select **Share folder**.
3. Choose a peer's name from the list or enter an email address. Click **Add to share**.
4. Allow recipient to edit or view only.
5. Click **Save**.