

Checkpoint

Managing Folders

Checkpoint provides several options for managing content that you have saved in your Folders. Folders can be created and renamed, items can be moved to other folders and to the recycle bin for deletion or can be printed, exported, or emailed.

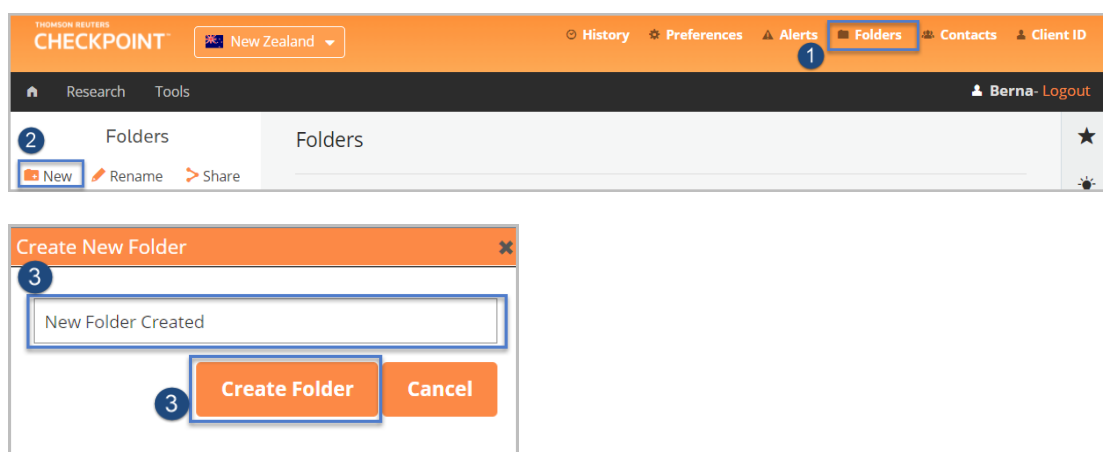
Create a New Folder

Create folders and sub folders to store documents and searches.



New

1. Select the **Folders** menu from the orange tool bar
2. Select **New** from the **Folders** window panel
3. Enter a folder name and click the **Create Folder** button
4. Click **OK** to confirm



Note: For more detail on **Folders**, see the Folders training guide.

Rename a Folder

Edit and rename folders created from the Folders page.



Rename

1. Select **Rename** from the **Folders** window panel
2. Edit the folder name and click the **Rename** button
3. Click **OK** to confirm



Document Delivery

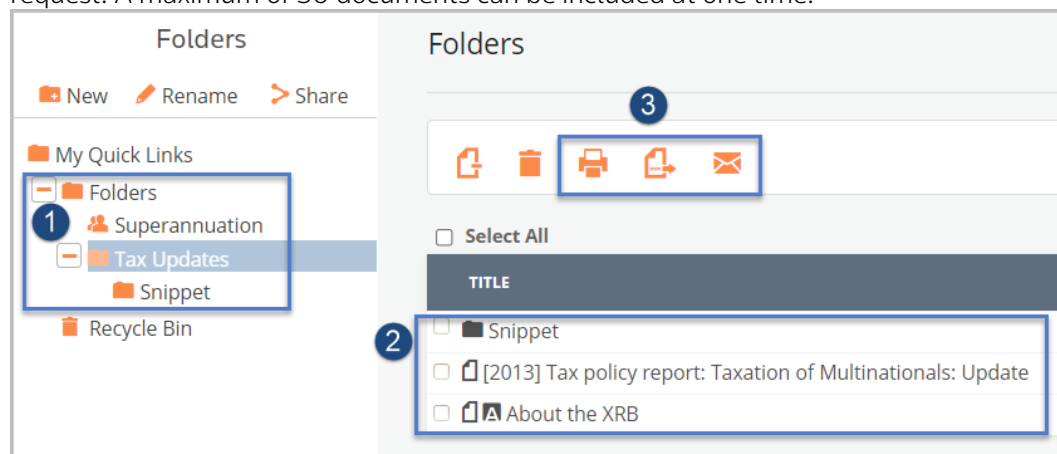
Print, export, or email saved documents.



1. Select a folder from the **Folders** window panel
2. Tick the checkbox beside the item name(s). You can choose one or multiple items to output at one time
3. Select the **Print, Download** or **email** icon from the white tool bar

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

Note: 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.

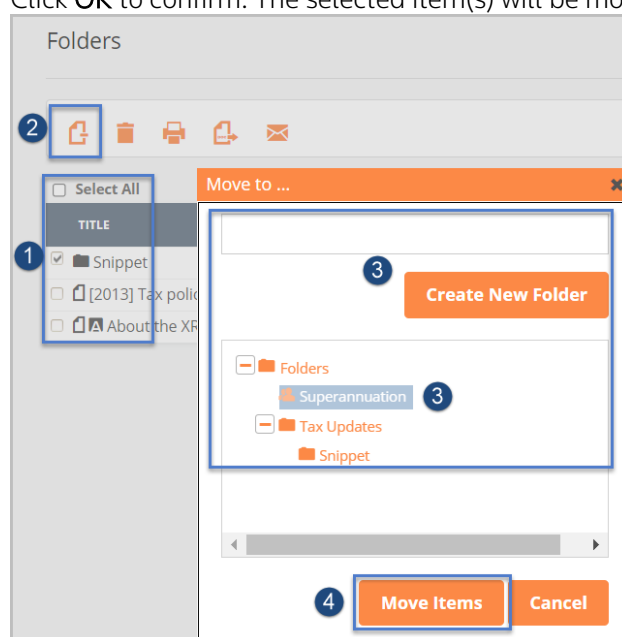


Move Items

You can move items that you have saved to another folder location



1. Tick the checkbox beside the item(s) you want to move. You can choose one or multiple items to output at one time
2. Click the **Move Item** icon from the white tool bar
3. From the 'Move to' pop-up, select a folder location or create a new folder and click the **Move Items** button
4. Click **OK** to confirm. The selected item(s) will be moved to the new folder location



Move Folder or Item(s) to Recycle Bin

Send folders to the Recycle bin.



1. Tick the checkbox beside the item name(s) to delete. You can choose one or multiple items to move at one time
2. Click on the **Recycle Bin** icon from the white tool bar
3. Click **OK** to confirm.

Restore Folder or Items(s) from the Recycle Bin

Restore Folder or Item(s) from Recycle Bin



1. Select the **Recycle Bin** folder from the left window panel
2. Tick the checkbox beside the item name(s) to restore. You can choose one or multiple items to move at one time
3. Click the **Restore to Folder** icon from the white tool bar
4. Select a folder location or create a new folder and click the **Restore to folder** button
5. Click **OK** to confirm.
The selected item(s) will be moved to the new folder location

Delete

Permanently delete a Folder or Item(s)



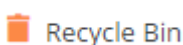
1. Select the **Recycle Bin** folder from the left window panel
2. Tick the checkbox beside the item name. You can choose one or multiple items to move at one time
3. Click the **Delete** icon from the white tool bar
4. The selected item will be permanently deleted
Note: Items cannot be accessed from 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.

Other Content accessed via the Folders page:

This folder lists your saved **Quick Links** and enables you to view and edit them.



1. Click on **My Quick Links** folder in the left window panel.
Note: Your saved Quick Links will be displayed on the main page
2. Click the title to view the document content
3. To **Edit** your Quick Link, click the **Gear** icon, edit the title, and click **Update**
4. To **Delete** a Quick Link click the **X** icon, and click **Remove Quick Link**.



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

The screenshot shows the 'Folders' page interface. On the left, the 'My Quick Links' folder is highlighted with a blue box and a circled '1'. The main area displays a table of 'Quick Links' with columns for 'TITLE', 'CONTENT TYPE', and 'CLIENT ID'. A row is visible with the title 'Tax - Analytical framework', 'Search' as the content type, and 'Unassigned' as the client ID. This row is highlighted with a blue box and a circled '2'. In the bottom right corner of the table, there are three icons: a gear (circled '3'), an 'X' (circled '4'), and a plus sign.