

Checkpoint AU

Sharing Folders

Share your folders and the associated sub-folders with other Checkpoint users within your organisation.

To share a folder:

1. Click on Folders in the orange toolbar
2. Select the folder you want to share
3. Click on the **Share** link

The screenshot shows the Checkpoint AU interface. The top navigation bar includes 'History', 'Preferences', 'Alerts', 'Folders' (highlighted with a blue box and a '1'), 'Contacts', and 'Client ID'. Below this, there are tabs for 'Research', 'Workflow', 'Tools', and 'Learning'. On the left, a 'Folders' sidebar contains a 'Share' button (highlighted with a blue box and a '3') and a tree view of folders. The 'FBT' folder under 'Deductions' is selected (highlighted with a blue box and a '2'). The main area displays a list of folders with columns for 'TITLE', 'CONTENT', 'CLIENT ID', and 'DATE ADDED'.

TITLE	CONTENT	CLIENT ID	DATE ADDED
<input type="checkbox"/> Rates	Folder	-	19/04/2021
<input type="checkbox"/> "Car parking"	Search	-	19/04/2021
<input type="checkbox"/> 37AC Meal entertainment benefits	Legislation	-	19/04/2021
<input type="checkbox"/> Entertainment expenses fringe benefit	Commentaries	-	19/04/2021

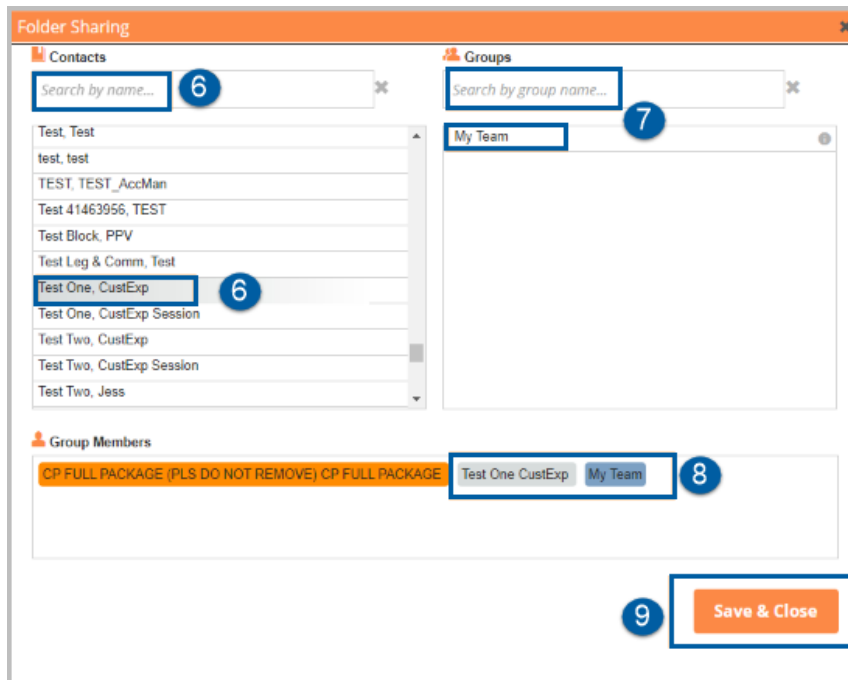
4. From the **Folder Sharing** pop-up window, the **Apply to subfolders** checkbox will control access to subfolders. Unticking the checkbox will prevent contacts from accessing the subfolders within the folder.
Note: By default, contacts will have access to all folders and any sub folders.
5. To add a new contact(s) click on the **Add Members** button

The screenshot shows the 'Folder Sharing' pop-up window. It has a title bar with 'Folder Sharing' and a close button. Below the title bar, there is a 'Groups' section with a checkbox 'Apply changes to subfolders' (checked, highlighted with a blue box and a '4'). Below this, there is a table with one row: 'Dogana, Berna' and 'Owner' (with a red 'X' icon). At the bottom, there are two buttons: 'Add Members' (highlighted with a blue box and a '5') and 'Save & Close'.

6. Select a contact(s) from the Contacts list select to add.
Note: You can search for a contact by entering their name in the 'Search by name...' field
7. Alternatively, select a Group from the Group list to add.
Note: 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** to exit

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



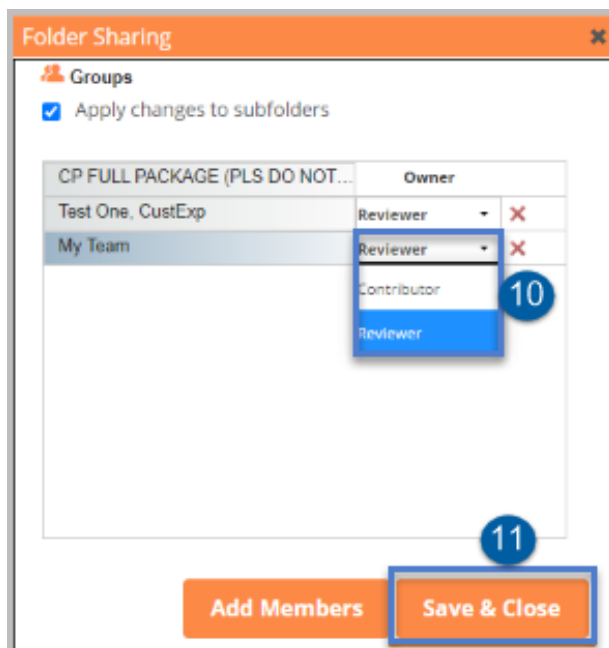
10. From the Folder Sharing pop-up window, select the permission level for the newly added contact and/or group.

Note: There are 2 permission levels that can be assigned when sharing folders

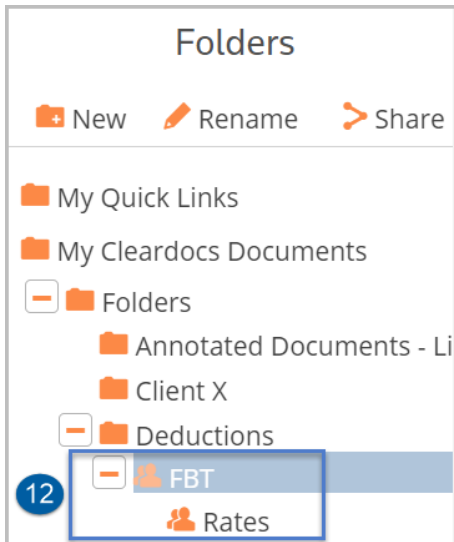
Reviewer - Can only view and read the shared documents

Contributor - Can review and save documents or searches to the shared folder.

11. Click the Save & Close button



12. The Folder(s) list will display the People icon to indicate that this folder has been shared, and the user(s) shared with will see the shared folder in their directory.



13. To stop sharing with a user, select the Folders
- Select the shared folder from the Folders list
 - Click the **Share** link
 - Click the X to the right of the Contacts/Groups you wish to remove
 - Click the **Save & Close** button

