Checkpoint

Sharing Folders

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

To share a folder:

- 1. Click Folders from the orange toolbar
- 2. Select the folder to share
- 3. Click on the Share link

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	Select All			
	TITLE	CONTENT	CLIENT ID	DATE ADDED
	□ 🖞 About the XRB	Commentaries	-	12/05/2021
	🗆 🖞 Staples & Tax Rates Guide	Commentaries	-	12/05/2021
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- 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

Folder Sharing		×
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5 Add Members	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...' field7. 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

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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
 - a. Select the shared folder from the Folders list
 - b. Click the Share link
 - c. From the Folder Sharing pop-up box, click the X to the right of the Contacts/Groups you wish to remove
 - d. Click the Save & Close button







