## 01. WHAT IS FOLDERING?

Foldering is organizing documents for a specific purpose using the Foldering panel. You might, for instance, use folders to conduct pre-production QC or to organize documents that will be used as hearing or trial exhibits. Similarly, if you are running searches and want to compile search results together to return to later, you can add the search results to a folder.

Adding documents to a folder does not move the documents in any way; it simply allows you to quickly filter to a folder's contents and view that document set.

Foldering documents is different from tagging documents; when documents are added to a folder the Tag History icon in the Results List is never activated and the Reviewed By field is never populated.

02. HOW DO I ACCESS THE FOLDERING PANEL?

If your user rights allow it, click the Tagging panel menu and select Foldering. Fields designated by the Case Manager are displayed in the panel.
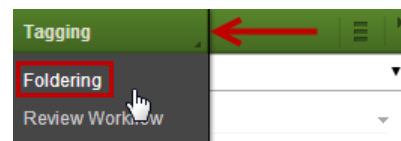
## 03. HOW DO I ADD DOCUMENTS TO A FOLDER?

1. In the Results list, select the document(s) to be added to a folder. If you are working on the Review page, you can add the current document to a folder without first selecting the document.
2. Switch the Tagging panel to Foldering.
3. Hover on the name of the folder to which the document(s) will be added.
4. Click the checkmark for the folder when it appears to add the document(s) to the folder. *Documents are added to the selected folder and its top-level folders.*
5. A message confirms the name of the folder to which the selected documents were added.
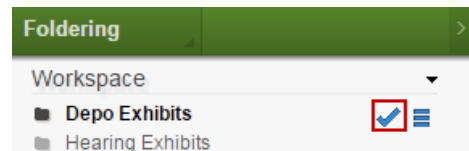
You can optionally click the toolbar button for the folder and select Add to Folder instead of clicking the checkmark.

04. HOW DO I REMOVE DOCUMENTS FROM A FOLDER?

1. In the Results list, select the document(s) to be removed from a folder. If you are working on the Review page, you can remove the current document from a folder without first selecting the document.
2. Hover on the name of the folder from which the document(s) will be removed.
3. Click the toolbar button for the folder when it appears and select Remove from Folder. *Documents removed from a top-level folder are removed from that folder and all sub-folders. Documents removed from a sub-folder are removed from that folder and all sub-folders only; they are not removed from any higher-level folders.*
4. A message confirms the name of the folder from which the selected documents were removed.

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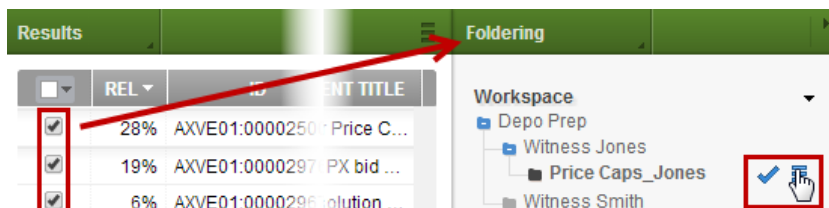
05. HOW DO I VIEW DOCUMENTS CONTAINED IN A FOLDER?

To view documents in a folder, switch the Tagging panel to the Foldering panel and then click the toolbar button to the right of the folder of interest. In the drop-down menu, select Filter Results. A Smart Filter is automatically applied, narrowing the Results List to just the documents within that folder.
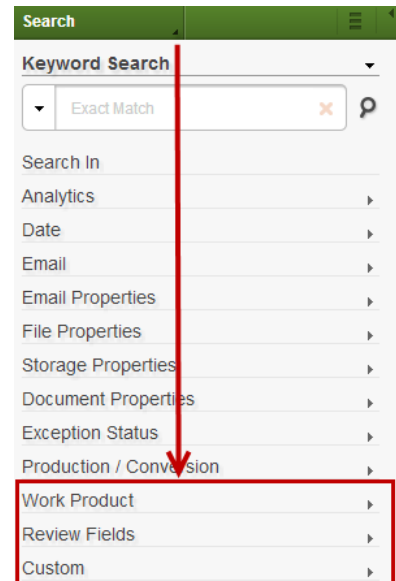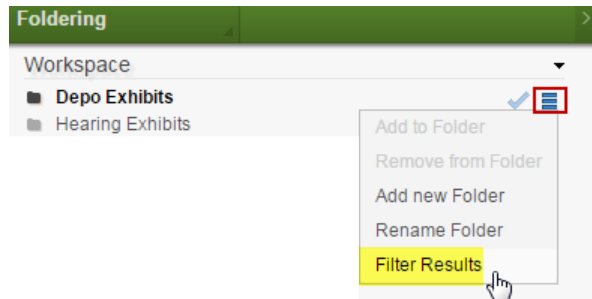
You can also view documents in a folder by manually applying the Smart Filter. Locate the applicable Smart Filter in the Search panel, typically found under the Work Product, Review Fields or Custom Smart Filter groups. Open the filter, select the folder name from the list and click Apply. If the specific folder value is not visible, use the Smart Filter type-ahead text box to search for the folder by name.

To return to the full Results list, clear the applied filter by clicking the X in the Current Criteria panel or the New button in the Search panel header.

06. HOW DO I RENAME OR ADD A FOLDER?

To rename a folder or add a new sub-folder, hover on the folder name and click the toolbar button when it appears. If your user role allows it, you'll see options to Rename Folder or Add New Folder. Select the relevant option, then input your changes and click the checkmark to save.
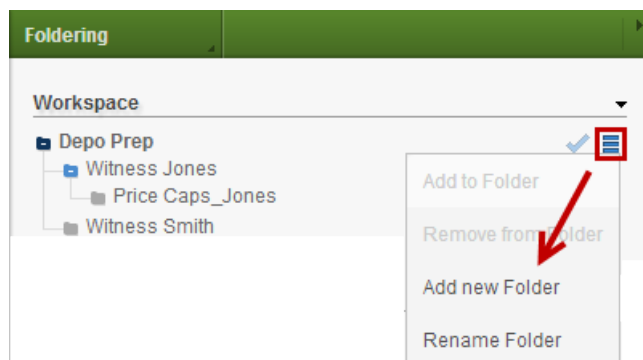
The display limit for folder names is 26 characters, but names can be longer; the hover-over will display the full folder name.

07. HOW DO I DELETE A FOLDER?

Case Managers can delete folders from the Fields and Values page. Contact your Case Manager for assistance.

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