# Working with folders

After running a search, users may wish to save some or all of the documents retrieved by a query into a PatBase folder. A single folder can contain up to 40,000 family records at a time, and each PatBase ID can hold up to 2,500 folders.

Before we move on to outline how to work with folders within PatBase it is important to note that families held within folders are **not static**. This means that if new members or equivalents are added to the families held within a folder, these members will be visible in the folder the next time it is opened. PatBase will not add new families to the folder, only new members or information appended to existing or new members of the included families. If you wish to create a copy of the folder results for a specific time, then the data in the folder must be exported or published at said time.

Creating and opening a folder:

To create and open your first new folder, click the *New Folder* option listed under the *Folder* tab on the top toolbar.
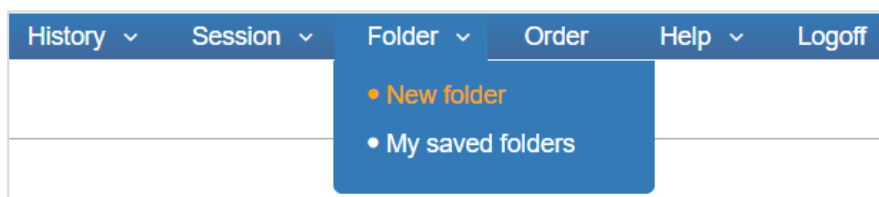
Users will then be directed to the folder management page. Here they can create a new folder, by entering a name in the text box displayed under *Add a new folder* at the top of the page or on the right-hand side. Folder names only accept standard Latin characters and do not accept symbols or accents.

At this point, users can decide whether they wish to share the folder with other users of their PatBase domain. They can choose to either share the folder with all users or define user groups by selecting users from a list. Access rights can be set at either read/write (able to add and remove information to the folder as well as view it) or read-only (only able to view the information held within the folder).

Rename a folder

To rename a folder, select *move/rename* against the folder you wish to change. Enter the *New folder name* and click rename to save it.

Delete a folder

To delete a folder, select *delete* against the folder you wish to remove.

To delete multiple folders, check them using the checkboxes down the left-hand side of the folder table, and scroll to the bottom of the screen, selecting delete from the dropdown as shown below.
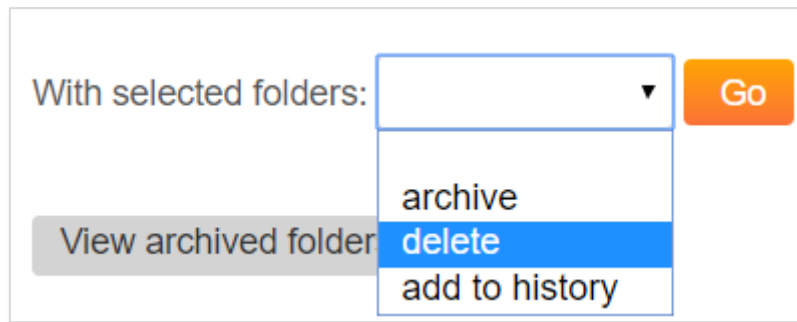
Adding records to a folder

Records can be added to a folder in several different ways when viewing/browsing search results.

When viewing a family, you can add it to a folder by checking the indicated check box on the family bar to add it to the currently open folder.

Add to a folder other than the currently open folder

Click on this icon to open a pop-up list of your private and shared folders, check a box in the list to add the record to an existing folder or enter a new folder name to add the record to a new folder.

Folder shortcuts

Folder shortcuts enable a user to work with up to 10 folders at the same time. Clicking on the icon will retrieve a list of all available folders. Click the *Add shortcut* button to add a folder's shortcut to your family toolbar.

If a folder is already open, it will count as one of your shortcuts and you will be able to open 9 more. If no folder is open, you will be able to add all 10 shortcuts. Folder shortcuts appear below the family bar when viewing records:

The open folder, in this case, is 'Example', which is shown in blue, with the remaining shortcuts shown in orange. As you scroll through the families in your result set you can add any family to multiple folders by checking the checkboxes on your shortcuts.

These shortcuts will remain active within a session, so if a different shortcut is needed, click the icon again and select *remove shortcut*.

Add all records to a folder

You can add all the records from a search query to an open folder by clicking *more...* against the search query on the *History* page. The contextual toolbar to the right of the page will update, and you will be able to select *Add to results folder* from the newly available options.

You will then have three options: Add results to current folder (if there is a folder open), Name new results folder or Select an existing folder. When adding to an existing folder, the *filter by folder name* search box simplifies finding the folder you are looking for.
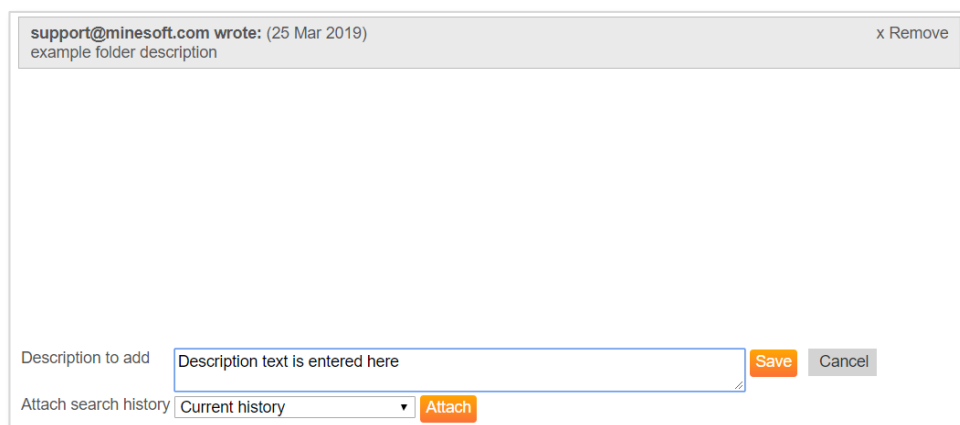
The limit of records that can be added to a folder at one time is 10,000.

Add a folder description

When viewing a folder, some additional options are available. To add a description to an open folder, click the folder description button shown below:
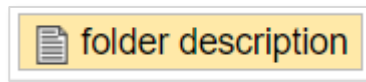
You can add a description of choice which will be timestamped. You can also attach the search history to a folder if, for example, you have constructed a search history specifically to generate the result set that has been added to the folder.
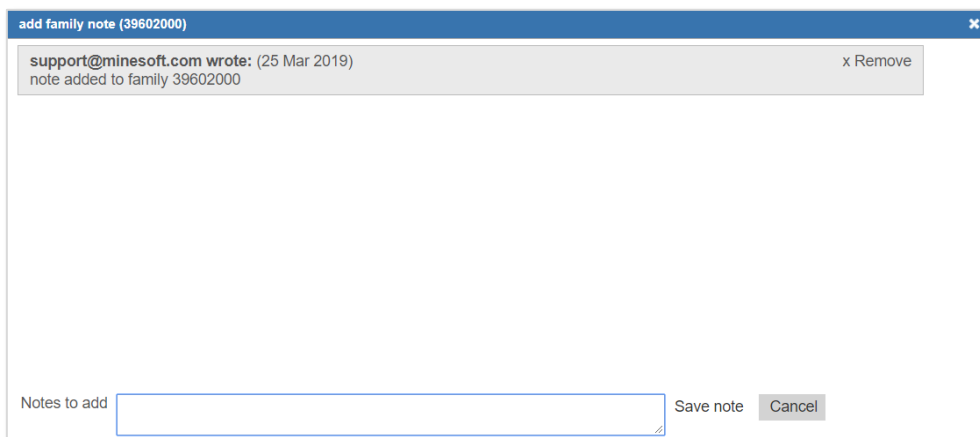
Add notes to records within a folder

To add a note against a specific family in the folder, select the note icon on the toolbar for the family of interest:

A text area box will appear and you will be able to append a note against the given family:
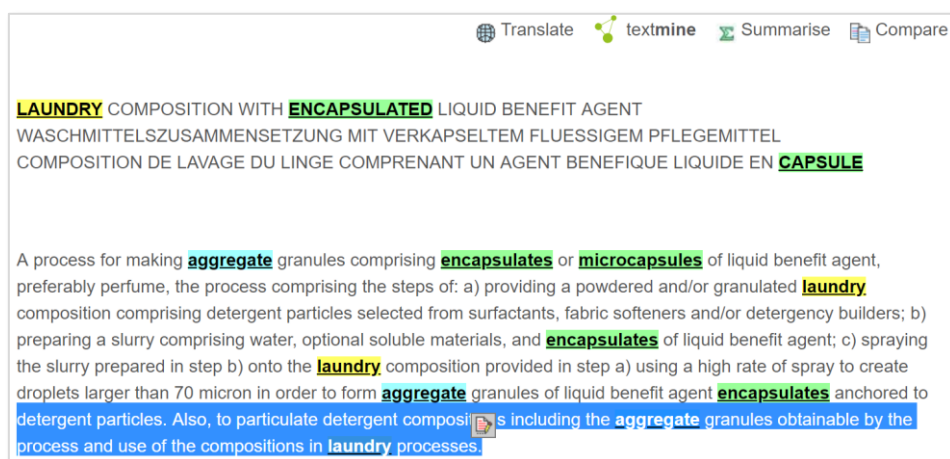

Add notes from full text whilst using folder shortcuts

Whilst working with folder shortcuts in the full text view, first select a document's text area to view in full text mode, then highlight the text to generate the note icon, click the note icon to add the text area as a note to the family.

Add family ranking

You can add a ranking to any of the families saved within a folder when viewing the folder. In the family bar for any given family, click the row of stars to apply a ranking out of 5.
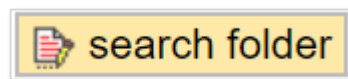
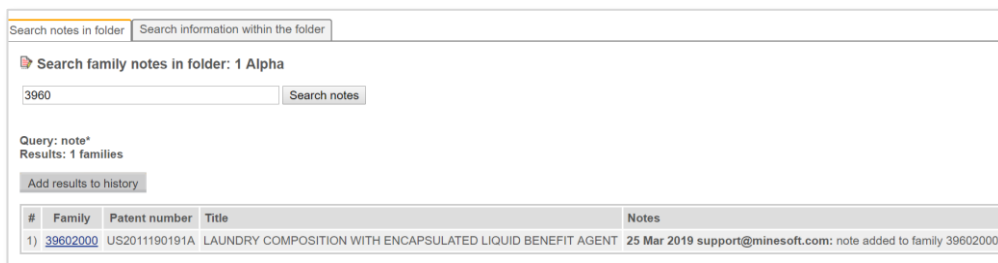To remove a ranking on a family, click the ✖ symbol to the left of the ranking.
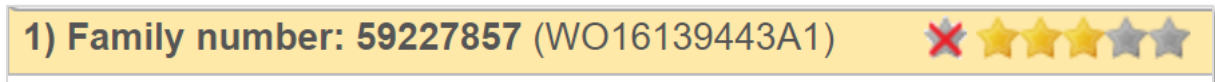
For shared folders, any user who has "Read-write" access can apply or edit the ranking of records.

Search folder

To search a folder, click the search folder button found at the top of the page when viewing the open folder.

This will generate a pop-out window where you can either search against any family notes recorded against families in the folder.
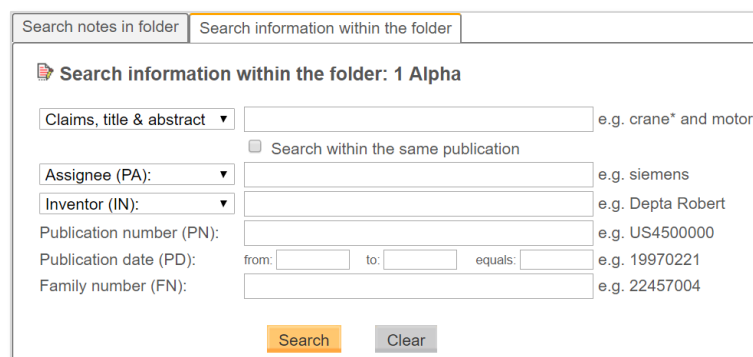
Alternatively, you can run a search against the PatBase field data held by families in the folder.

Publish folder

To publish a folder, first, open the folder and click the *publish folder* button as shown below, which can be found at the top of the page:
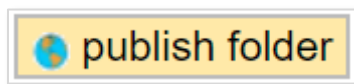
You will be asked to confirm the information you wish to publish, if none of the boxes below is checked, then only the PatBase data on the families within the folder will be made available.

A link will be generated, and you will see the screen below, inviting you to either copy the link to share using your own mail service/methods or to enter the email address of the recipient(s) into the below email form to send directly from PatBase:

Recipients that click the link will be presented with 3 options, for PatBase and PatBase Express subscribers, they can view the folder in either PatBase or PatBase Express. For non-subscribers there is the PatBase folder viewer which allows anyone with the link to see the bibliographic data for each of the included families, view the family and legal status explorer information and run a snapshot analysis on the contents.

Print or Export folder

Printing the information held within a folder or exporting all or part of it can be done by selecting the relevant button as shown below:
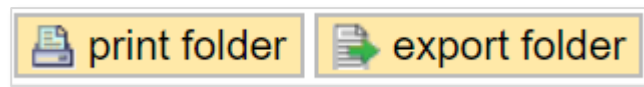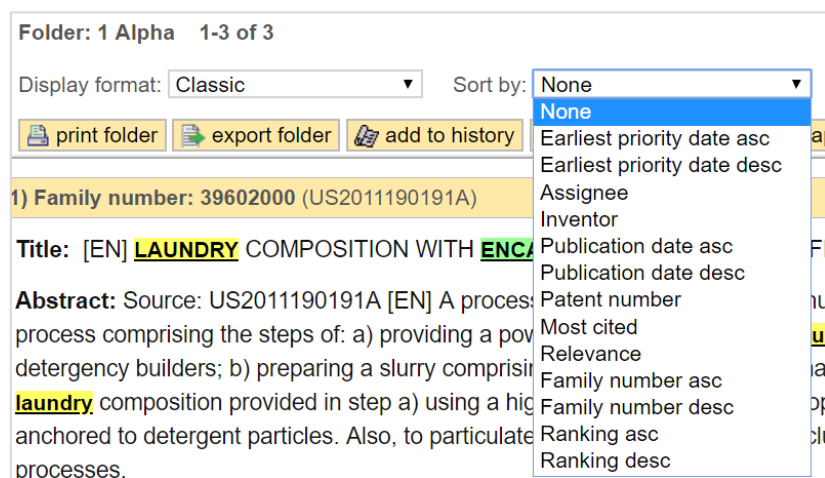

These buttons are accessible at the top of the page when viewing a folder.

Selecting print will open a new window detailing how many pages you are printing the layout etc.

Selecting *export folder* will open the Export Wizard. To learn more about exporting information, please see our exporting and sharing guide.

One important thing to note is if conducting a Word or PDF based export, the sort order of the export will match the sort order of the folder when exporting directly from a folder.

You can alter the sort order for the folder by clicking the sort by dropdown at the top of the page when viewing the folder.

Contact us

If you have any queries relating to using folders in PatBase, please contact support@minesoft.com or call us on +44 (0)20 8404 0651.