Binders 101

Learn how to use Compass Binders to access powerful searches and litigation analytics.

Compass stores search results in a virtual packet called a "binder." A binder can contain results from a single search or multiple searches divided by tabs, very much like a typical paper binder.

Bundling search results this way lets you share, export and print the entire binder with just a few clicks.

The example binder is a Judge Profile.

- Binder Name.
- TABLE OF CONTENTS contains tabs.
- Each tab has different search filters and results.
- Search results appear on the right.

The FILE button contains controls for the entire binder.
- Save, rename and delete the binder.
- Export the entire binder, or just the tabs you want, into one XLS file.
- Share the binder.

- Create one alert for the entire binder.
- Select a delivery frequency: intra-daily, daily, or weekly on a specific day.
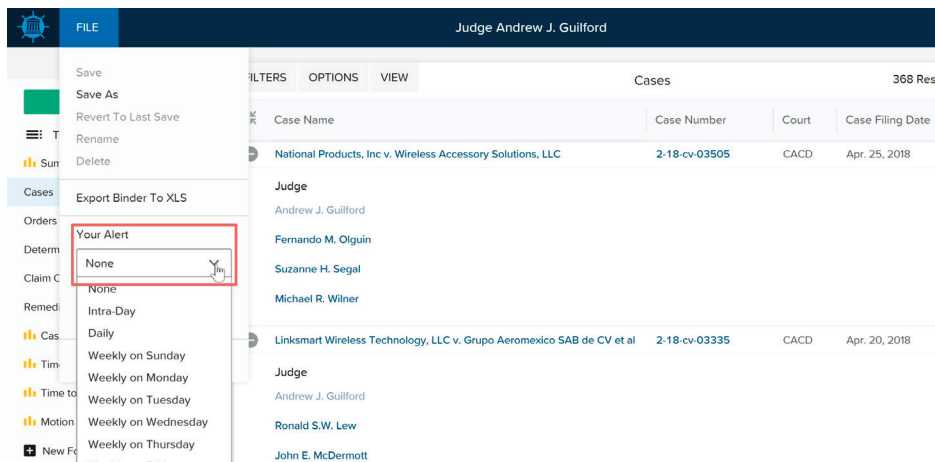
There are also controls for each tab.
- FILTERS: view and edit active filters for that tab.
- The top portion of the filter drawer displays the currently active filters.
- Expand RELATED FILTERS to quickly add a new filter.
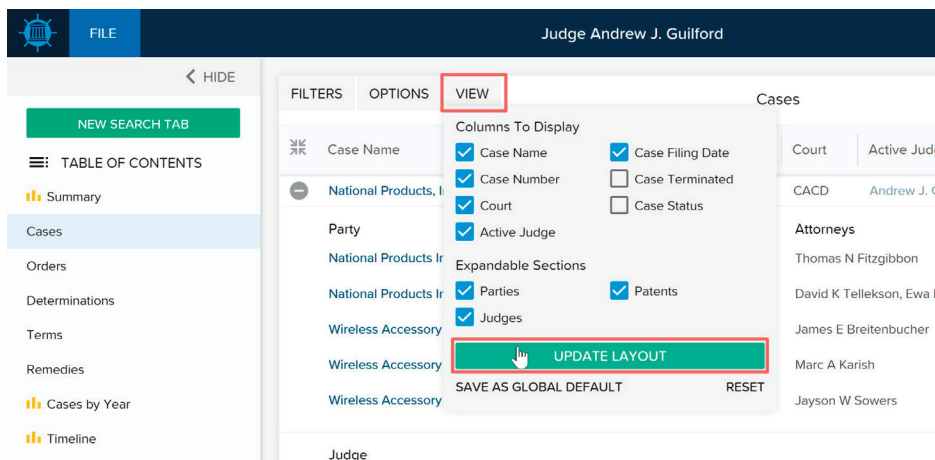- EDIT FILTERS opens a larger filters drawer for more detailed editing.
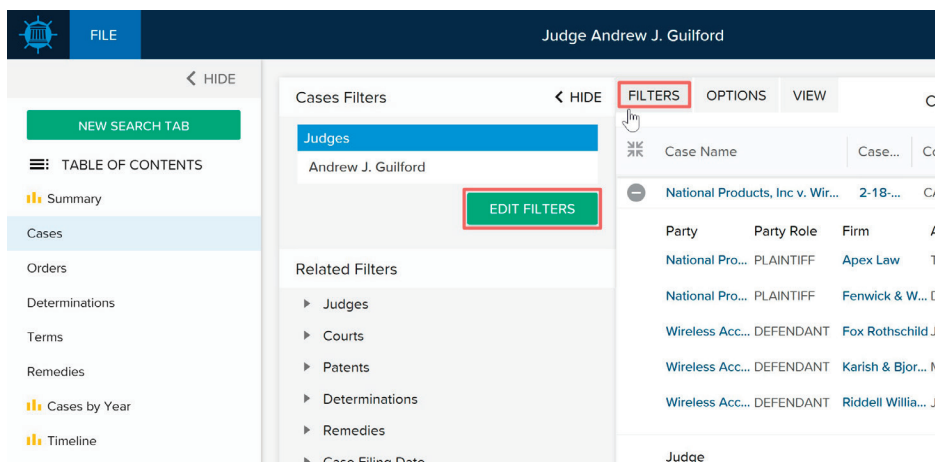
- VIEW: add or remove columns then click UPDATE LAYOUT to apply those changes.
- SAVE AS GLOBAL DEFAULT saves the columns as your preferred layout for that kind of search.
- RESET returns to the default columns.

- OPTIONS: copy, export, delete or rename a tab.
- COPY TAB opens a new tab, exactly duplicating the currently selected tab.
- OPEN ANALYTICS creates a new analytics tab with charts using the same targets and filters as the currently selected tab.
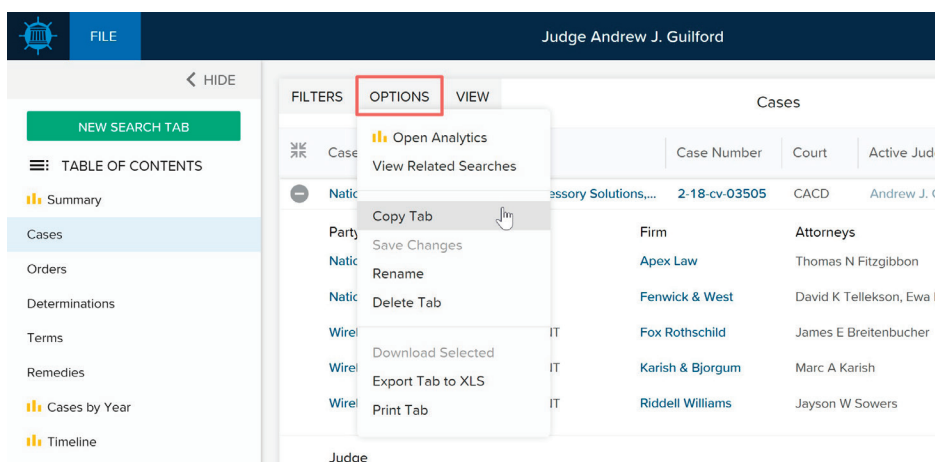
TABLE OF CONTENTS
- Add a new search tab.
- Right-click on tab names to copy, delete or rename.
- Reorder the tabs by dragging them with your mouse.
- NEW FOLDER: Create a folder. Drag tabs into the folder.
- Right-click on the Folder Name to Rename or Delete.
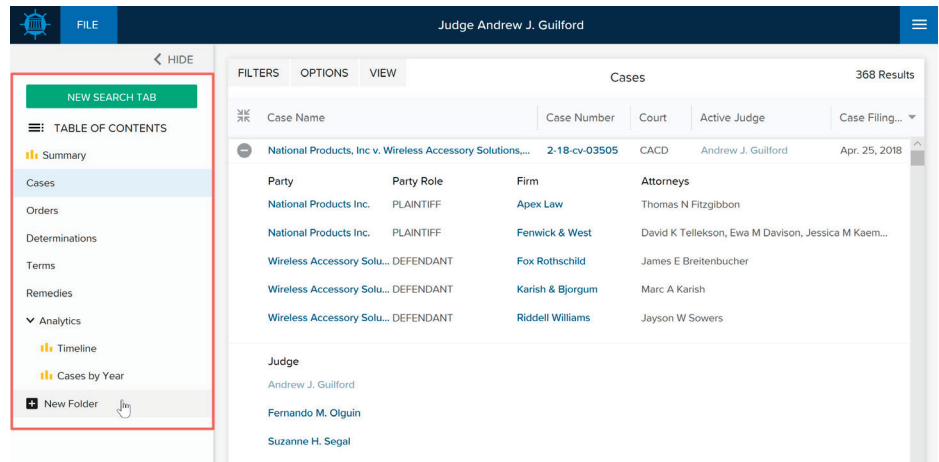
- Many of the features in the FILE menu and tab controls can only be enabled AFTER a binder is saved.
- A yellow "caution light" means the binder has unsaved changes.
- Once saved, your binder will appear under RECENT BINDERS in the main search page.
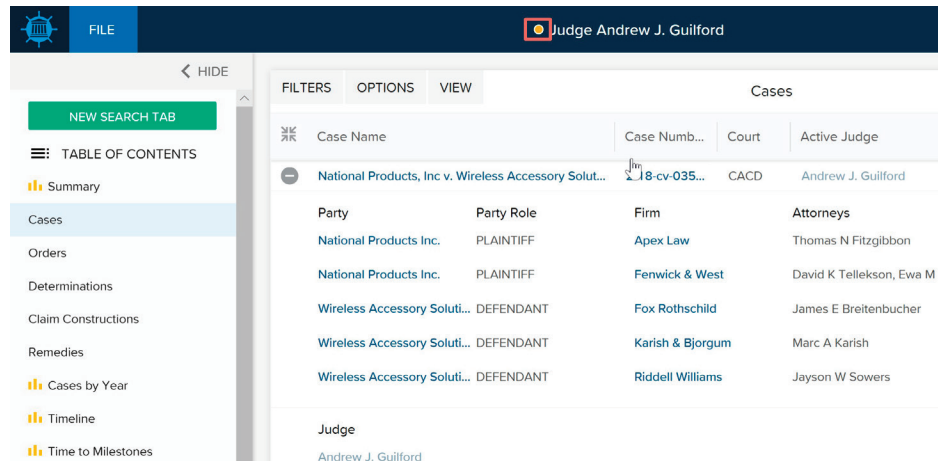
- Access all of your binders in the BINDER WALL.
- You can sort and filter to view previously saved binders and binders that have been shared with you.
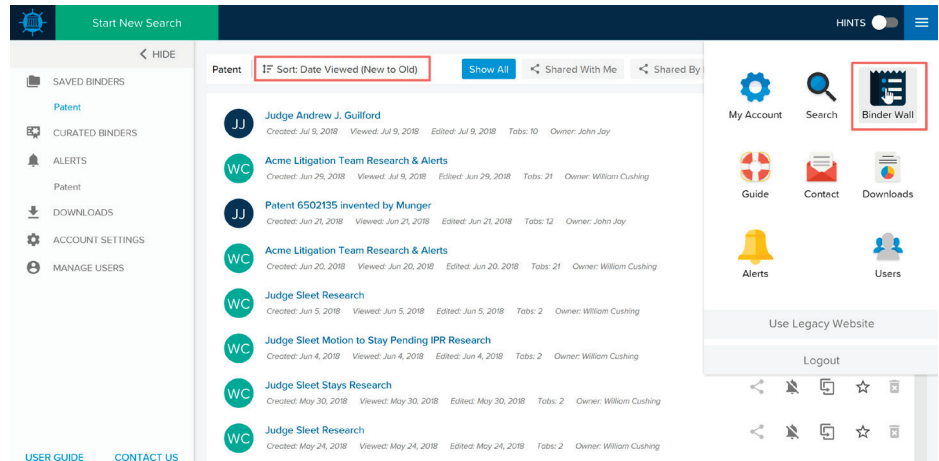
Please send an email to contact@docketnavigator.com if you have any questions. We're always happy to help.

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