FIRM CENTRAL MATTERS & DOCUMENTS

Firm Central allows users to create and store details about a matter, give colleagues access to the matter, create tasks and appointments that relate to the matter, record notes against the matter, and store documents that relate to the matter.

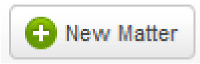
ADDING A NEW MATTER

You can create a new matter and record relevant details about the matter by doing the following:

1. Either:
    - Click the Add Matter button in the Firm Central banner:

    - Click the **Matters** tab in the Firm Central banner, and then click the New Matter button;

2. Both of these methods will bring you to the New Matter screen, where you can fill in the any of the following details that are relevant to this contact:

MATTER DETAILS	Begin by recording the following details: • Matter Name • Client • Alternate ID If the client for this matter has already been entered into the firm's records, the client name will appear as predictive text when you start typing in the Client field. If the client is a new client, a **create a new client** link will appear when you start typing the client's name in the Client field. Clicking this link will open the New Client screen, where you can enter the client's full name and contact details. The Matter Name and Client are required fields, you must record these details before you can save the matter. The Alternate ID is optional, you do not need to populate this field if you do not wish to
MATTER DESCRIPTION	The Matter Description allows you to assign a basic classification and description to the matter and record the opposing party's details (if needed) The following fields are available in the Matter Description:

	• Practice Area • Work Type • Work Description • Opposing Party The **Practice Area** drop down can be used to assign the matter to a general practice area. This field can be used when searching for the matter in future The **Work Type** drop down can be used to assign a secondary classification based on the Practice Area The **Work Description** field is a free text field which can be used to supply a short description of what the matter is about The **Opposing Party** area allows you to enter the name and contact details of the opposing party or opposing parties in the matter The Matter Description fields are all optional, if you do not wish to populate them, you do not have to
COURT INFORMATION	If the matter is going to Court, you can record the following details: • Court/Jurisdiction • Court File Number • Limitation Period These fields are both optional, if you do not wish to populate them, you do not have to
MATTER PERMISSION & MATTER TEAM	The Matter Permission & Matter Team area shows a list of all the members of the firm. You can use the Matter Permission drop down, and Matter Team checkbox beside a name to indicate what level of access that person should have to this matter You can select from the following Matter Permissions: • **Owners:** Can create, edit, and delete Matters and Matter Documents. • **Editors:** Can edit Matter. Editors cannot delete a matter or move/delete documents added to a matter. • **Read Only:** Can view all Matter information but cannot edit or delete. • **Denied Access:** User cannot see any portion of the Matter. Selecting the **Matter Team** checkbox will mean that this matter appears in that person's My Matters list, and that tasks and activities relating to this matter will show in the Calendar, Tasks, and Notifications widgets on that person's home page

BILLING TYPE	You can record the billing type that will be applied to this matter
NOTES	You can record any notes or background details in this field These field is optional. If you do not wish to populate it, you do not have to

3. Once you have entered all the details you need to, you can press the **Save** button to save the Matter

ADDING A NOTE TO A MATTER

You can add notes to a matter. The note feature can be used to remind yourself, or other members of the matter team what point the matter has got to, or what the needs to happen next.

You can add a note to the matter by doing the following:

1. Locate the matter you wish to add a note to
2. Click on the **Matter Profile** page
3. Enter the text of your note in the Notes field
4. Click the **Save** button below the Notes field
5. The note will now appear on the **Matter Profile** page

ADDING DOCUMENTS TO A MATTER

Any documents that are created or supplied in relation to a matter can be uploaded and stored with the matter.

You can upload a document to Firm Central by doing the following:

1. Click the **Documents** tab
2. Select **My Documents, Firm Library**, or the matter folder or subfolder from the All Documents list that you want to add the document to
3. Click the **Upload a Document** icon on the right side of the page
4. A file upload page is displayed. Click **Add Files** to access the file(s) you want to upload.
5. Select the document(s) you want to upload to your matter and then click **Open**.
6. Click **Upload**.
7. Firm Central shows the progress of your files being uploaded. After all of your files are uploaded, click **Close**.

SUPPORTED DOCUMENT FORMATS

You can upload documents of up to 20MB in any of the following formats to Firm Central:

- Microsoft Word (.doc and .docx)
- WordPerfect (.wp and .wpd)
- Portable Document Format (.pdf)
- Text (.txt)
- Rich Text Format (.rtf)
- Microsoft Outlook Message (.msg and .eml)
- Web (.htm and .html)

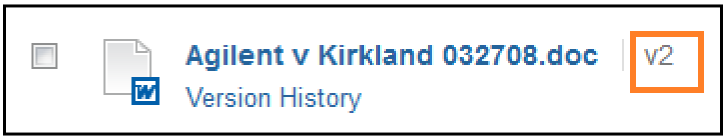
- Apple files:
    - .key
    - .numbers
    - .pages
- Audio Files:
    - Windows Media Formats (.wma, .wmv)
    - Audio Visual Interleave (.avi)
    - Audio for Windows (.wav)
    - QuickTime Movie file (.mov)
    - Moving Pictures Experts Group (.mpg, .mp2, .mp3)
    - mp4 (.mp4, .m4a)
- Microsoft Excel (.xls and .xlsx)
- Microsoft PowerPoint (.ppt and .pptx)
- Graphics files:
- .tif and .tiff
- .bmp
- .jpe and .jpg and .jpeg
- .gif
- .png
- .jfx
- WinZip (.zip)

CREATING A NEW VERSION OF A DOCUMENT

As a matter progresses, you may find that you or a team member need to make updates and changes to a document that you have uploaded to Firm Central. You can create and upload a new version of a document by doing the following:

1. Locate the document you wish to modify and version
2. Click on the title of the document to open it in the Firm Central Document Viewer
3. Click the **Open in Native Format** icon  on the Document Viewer toolbar
4. Select **Open with** to open the document in your word processor
5. Make the changes to the document
6. Save the document to your hard drive using the same name as it had when stored in Firm Central
7. Return to the Firm Central document folder where the original version of the document was stored
8. Click the **Upload** button 
9. When the Upload dialogue appears, click the Upload button
10. Click the **Version Document** link

11. When the document has uploaded, you will be able to see a version number beside the file name :

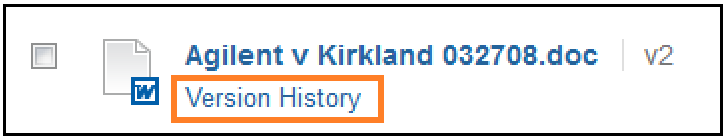


12. You can click the **Version History** link to see the full list of versions for a document

RECOVERING AN EARLIER VERSION OF A DOCUMENT

If for any reason you need to recover an earlier version of a document which has had multiple versions created, you can do the following:

1. Locate the document
2. Click the Version History link to see the full list of versions



3. When the list of versions appears, click the radio button beside the version that you wish to recover, and click the **Revert** button
4. Click **Yes** to confirm that you want to complete the revert
5. A new version of the document will be created. The new version will be a copy of the earlier version that you had selected