

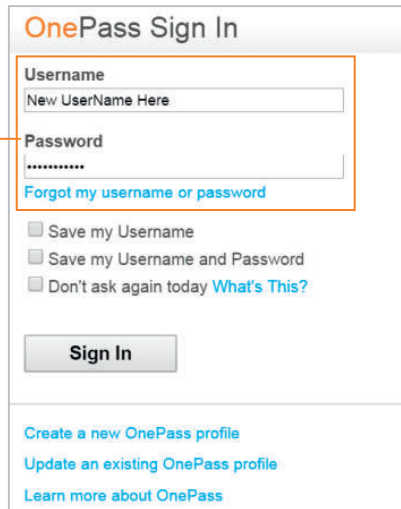
FIRM CENTRAL[®]

MANAGING MATTERS IN FIRM CENTRAL – GENERAL USERS AND ADMINISTRATORS

QUICK START GUIDE

STEP 1

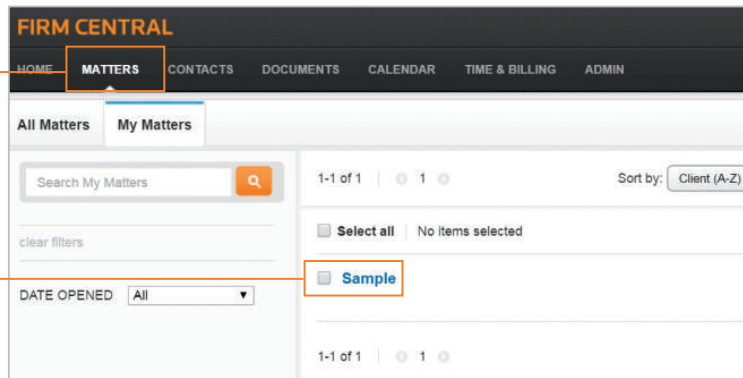
Go to firmcentral.westlaw.com and sign in with your usual OnePass.



The OnePass Sign In form includes a Username field with the placeholder text "New UserName Here", a Password field with masked characters, a "Forgot my username or password" link, and three checkboxes: "Save my Username", "Save my Username and Password", and "Don't ask again today" with a "What's This?" link. A "Sign In" button is located below the form. At the bottom, there are three links: "Create a new OnePass profile", "Update an existing OnePass profile", and "Learn more about OnePass".

STEP 2

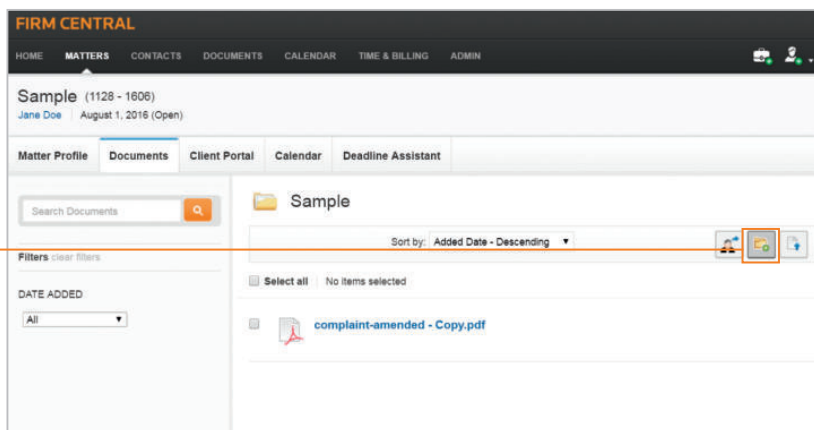
Click on the **Matters** link from the Firm Central homepage. Note that you may toggle between All Matters associated with your account and My Matters, which are matters you have created.



The Firm Central Matters page features a navigation bar with "HOME", "MATTERS", "CONTACTS", "DOCUMENTS", "CALENDAR", "TIME & BILLING", and "ADMIN". Below the navigation bar, there are tabs for "All Matters" and "My Matters". A search bar labeled "Search My Matters" is present. On the right, there is a pagination control showing "1-1 of 1" and a "Sort by: Client (A-Z)" dropdown. A list of matters is displayed, with one item titled "Sample" highlighted by a red box.

STEP 3

To manage a particular matter, click on the title of the Matter from the My Matters list. You will then see the full matter page.



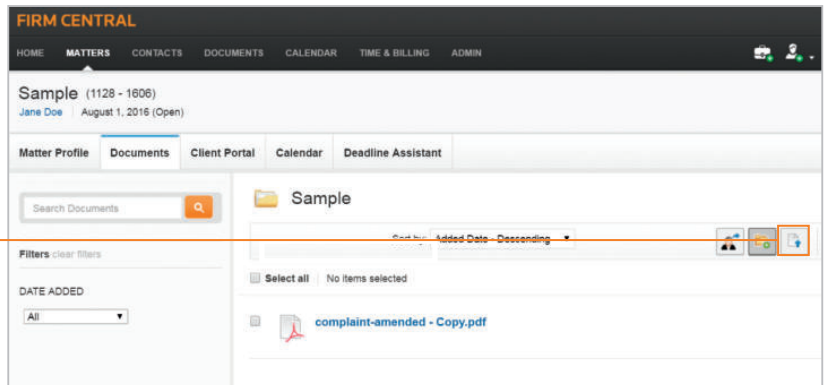
The Firm Central Matter Profile page for "Sample (1128 - 1606)" shows the user "Jane Doe" and the status "August 1, 2016 (Open)". The page has tabs for "Matter Profile", "Documents", "Client Portal", "Calendar", and "Deadline Assistant". A search bar labeled "Search Documents" is present. On the right, there is a pagination control showing "1-1 of 1" and a "Sort by: Added Date - Descending" dropdown. A list of documents is displayed, with one item titled "complaint-amended - Copy.pdf" highlighted by a red box.

STEP 4

Note that in addition to adding Task and Notes and modifying Matter Details, you may also begin to upload documents relevant to the particular matter via the Documents tab. When adding documents, you may create Folders by using the **Add a Folder** link.

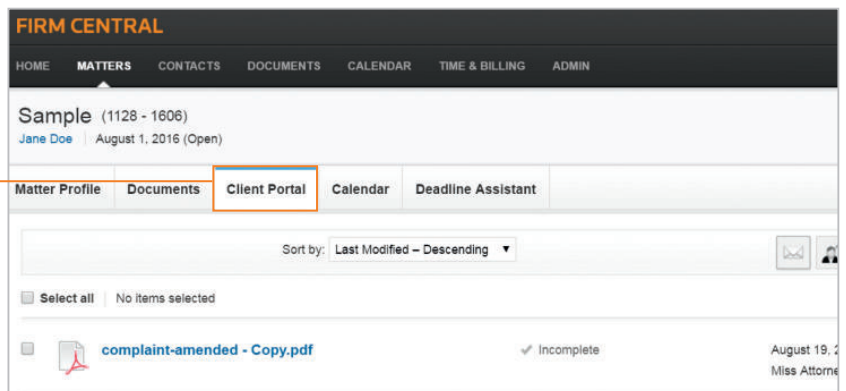
STEP 5

Or simply begin uploading documents to the matter without creating folders by using the **Upload a Document** link.



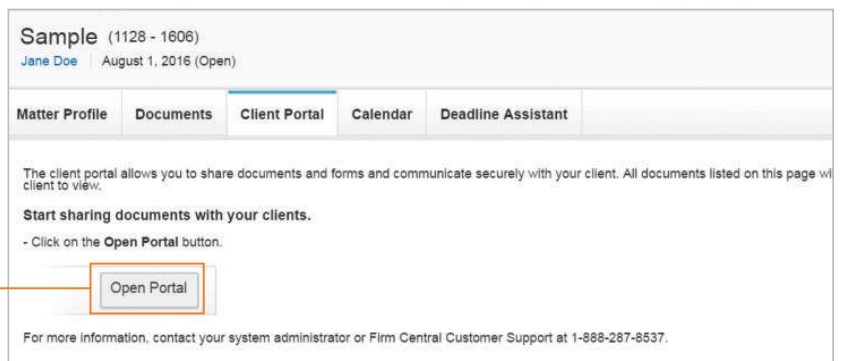
STEP 6

The Client Portal is another component of matter management within Firm Central. This feature allows you to securely share documents, forms and other matter materials with a client. Access to the Client Portal is available from the **Client Portal** tab within the specific matter.

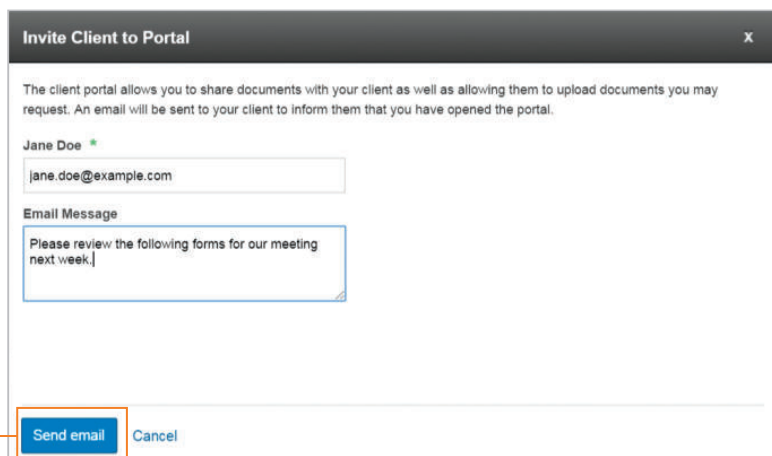


STEP 7

Start by using the **Open Portal** link from the Client Portal tab ...

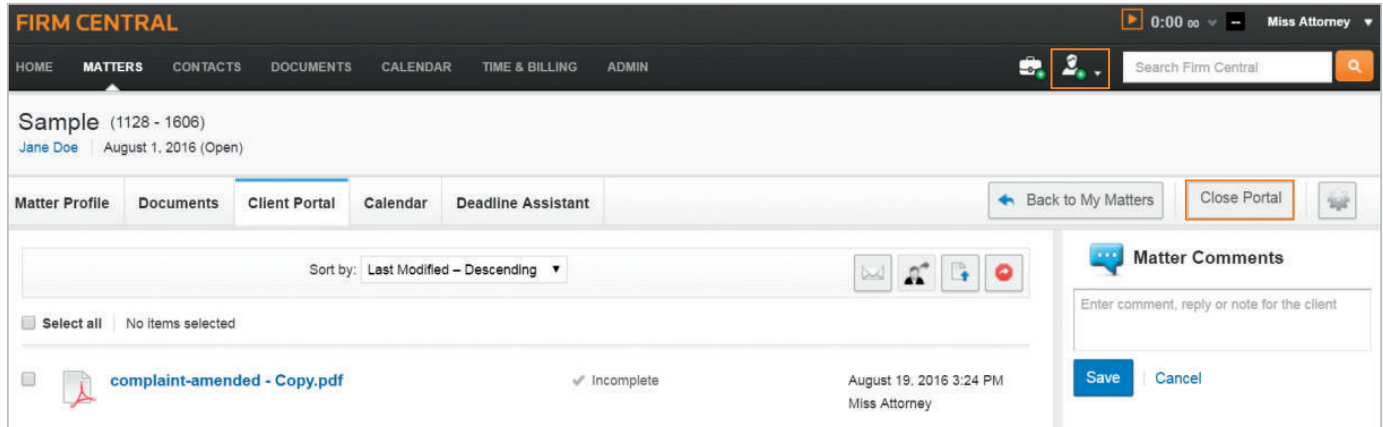


... then **invite clients** to the portal via e-mail.



STEP 8

Use the **Share an Existing Document** icon on the Client Portal page to make documents already added to the matter available to your client in a completely secure environment. You may also use the **Close Portal** link at any time to stop sharing.



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