



Firm Central

Documents

January 2016

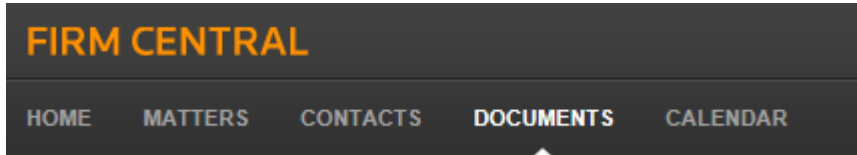
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ADDING DOCUMENTS TO A MATTER

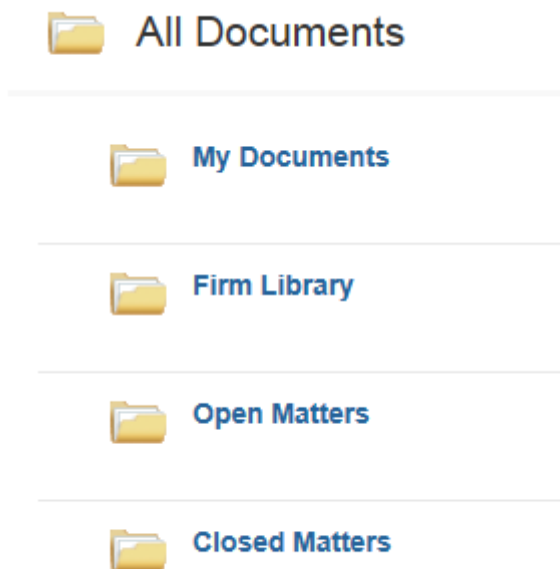
Any documents which are created or supplied in relation to a matter can be uploaded and stored in Firm Central.

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

1. Click the documents tab on the main Firm Central banner.



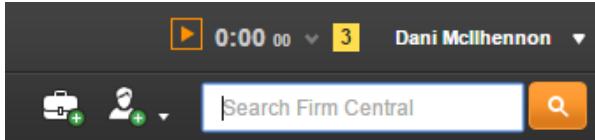
2. Select My Documents, Firm Library, or the matter folder and sub folder from the all documents list that you want to add the document to.



3. Click the Upload a Document icon on the right side of the page. The file upload page is displayed.
4. Click Add files the 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.

Note: You can search for documents using the Firm Central global search bar.

Firm Central searches the full text of documents in addition to the documents' metadata, such as their filenames, so you get complete results. Your search terms can include key words from the documents or their titles, a matter name, or the name of a document's author.



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)
- Text (.txt)
- Rich Text Format (.rtf)
- Microsoft Outlook Message (.msg and .eml)
- Web (.htm and .html)



Note: You can upload the following file types to Firm Central. When you view these files, they will open in their native applications, e.g., Microsoft Excel.

- Microsoft Excel (.xls and .xlsx)
- Microsoft PowerPoint (.ppt and .pptx)
- Portable Document viewer (.pdf)
- 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)
- Graphics files:
 - .tif and .tiff
 - .bmp
 - .jpe and .jpg and .jpeg
 - .gif
 - .png.
 - .jfx
- WinZipp (.zip)

CREATING A NEW VERSION OF A DOCUMENT

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

1. Locate the document you wish to modify
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. Make changes to the document
5. Save the document to your hard drive using the same name it has in Firm Central
6. Return to the Firm Central document folder where the original version of the document was stored
7. Click the upload a document icon on the  right side of the page

8. When the upload dialogue appears, click the Upload button
9. Click the Version Document link
10. When the document has uploaded, you will be able to see a version number beside the file name:



11. You can click the version history link to see the full list of version 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 documents
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.

Note: You can also view the earlier version of the document without reverting to it.