

Firm Central Drag and Drop Folder Quick Reference Guide

Firm Central now features the ability to drag and drop your folders into Firm Central for storage and anytime access. This bulk import feature can be accessed in two ways - from a Desktop Computer to the Firm Central website, or from a local Desktop Computer folder to Firm Central using Windows Explorer.

For Firm Central Support and technical assistance, call: **1-888-287-8537**

From a Desktop to the Website

With this new capability to bulk import documents into Firm Central from the Desktop to the Website, you can now drag and drop folders into My Documents, Firm Library and Open or Closed Matters.

NOTE: The Google Chrome Browser must be used to drag and drop folders from the desktop to the website; empty folders will not copy into Chrome.

BEFORE YOU BEGIN

Prior to executing the bulk import from desktop to website or desktop to desktop, a few steps will help make the process run smoother.

- In the Firm Central website, you may want to disable the document upload notification – this will avoid individual notifications from appearing for each file and folder uploaded. To adjust your notification settings, go to the preferences section, click on **Notifications** and deselect the checkbox next to Document Uploaded/Version Added. Then, click **Save**.
- Import all clients/matters or create clients/matters in the Firm Central website. This will set up your matters so you have target destinations for each matter's documents.

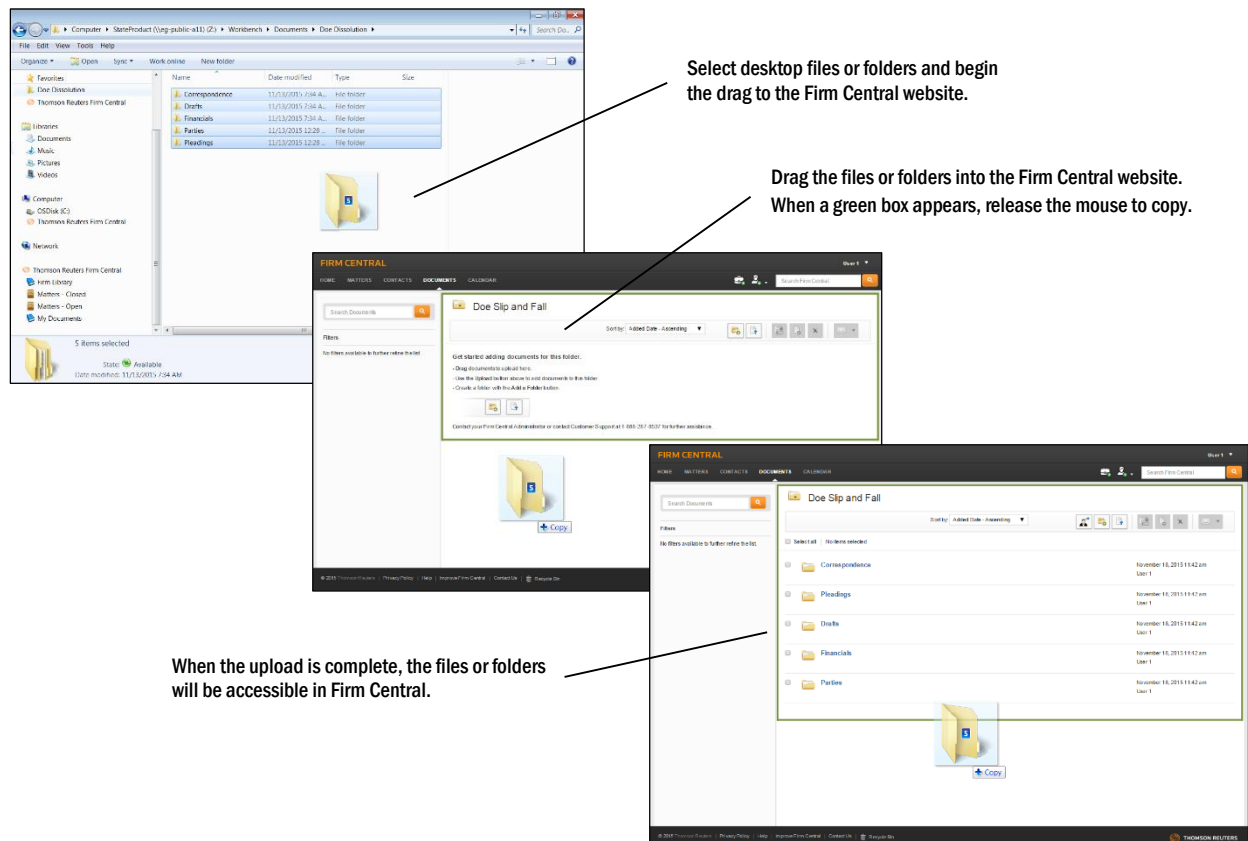
HOW IT WORKS

- Click the **Documents** tab, then select your desired location – My Documents, Firm Library, Open Matters or Closed Matters (or a subfolder) – to prepare your Firm Central document destination. If a specific matter is your destination, open the matter folder as well from the Open or Closed Matters folder.
- From your computer's desktop, access the folders and document(s), and select the title(s) and folder.
NOTE: To select all of the documents in a row, click the first document, hold down the **Shift** key and then click the last document. If the documents are not in a row, click the first document, hold down the **Ctrl** key and then click each additional file. Holding down the **Ctrl** key and the **A** key will select all folders and documents on the page.
- Next, left click your mouse, then drag the file(s) into the opened Firm Central folder area in the Chrome Browser. A specific folder will highlight in green to indicate it is the selected target location of the drag and drop action. A green box will appear around the area indicating that the file(s) will drop to the root folder instead of a specific subfolder.
- Release the mouse button to drop the file(s) into the desired folder.
- Firm Central will show the progress of the files being uploaded. As Firm Central uploads the documents, it applies indexing technology from Westlaw to add KeyCite status flags to your cited authority and links to the full-text documents on Westlaw. Note that you need a subscription to Westlaw to access KeyCite and the full text of your cited references.
- After all of the files are uploaded, click **Close**.



- When using Google Chrome, you cannot drag empty folders into Firm Central's document area. If you attempt to do so, you will receive a warning message noting that you cannot drag the selected empty folders (or an unaccepted file type) and they will not be uploaded. Click **OK** to move past the warning screen and continue uploading the remaining folders and documents.
- When the upload dialogue box opens, it displays the list of folders and documents to be uploaded. You now have three options:
 - You may remain on this screen while the files upload (no other work can be done while on this screen).
 - You may cancel the upload and any remaining items will not upload.
 - You may select the **Open New Tab** button from the upload dialogue box. This will open a new tab in Firm Central, where you continue to perform other work until the upload completes.
- If you return to the original tab during the upload, the displayed list will update to show the current progress, including those files that have successfully uploaded. You will also see a Cancel button that allows you to cancel the remaining uploads at any time. Once the upload completes, you must return to the original tab and **close** the dialogue box.
 - To monitor the status of your upload, review the Upload Queue on the footer of the screen in the second tab. The Upload Queue text will display the number of documents left in the queue.
 - Click on **Upload Queue** to see the list of upload batches you have started in the last 24 hours. You can view entries for completed uploads and note any items that did not upload due to an error. Click on the **email/print delivery** icon to deliver the list of items that failed to upload. These entries will disappear after 24 hours.
 - Documents will be uploading to the system while the queue indicates the number of items. As documents are uploaded, they can be accessed and opened in their native formats.

NOTE: It may take up to 24 hours for the documents to be indexed and available for search due to the bulk import process, which allows for the upload of a large number of items at one time.



From Desktop to Desktop

Users can use the drag and drop functionality to copy documents and folders into Matters using Windows Explorer. The desktop integration adds a Firm Central section to the groups of folders displayed in Windows Explorer on your computer. You can expand this section to access all of your Firm Central folders.

NOTE: To ensure drag and drop folder capability, users must have Version 2.1.0304 or newer installed.

HOW IT WORKS

- Open a Windows Explorer window and navigate to the Firm Central directory. Next, open a separate Windows Explorer window and navigate to the folder or documents to be transferred.
- To copy documents and folders from your desktop computer to My Documents, Firm Library, Open Matters or Closed Matters (or a subfolder), select one or more documents and folders and drag them to the destination folder listed below the Firm Central heading.

NOTE: To select all of the documents in a row, click the first document, hold down the **Shift** key and then click the last document. If the documents are not in a row, click the first document, hold down the **Ctrl** key and then click each additional file. Holding down the **Ctrl** key and the **A** key will select all folders and documents on the page.

- Once the selected folders and documents are pulled to the destination folder, the system will display a progress bar to indicate that the upload is active.
 - If any unaccepted file types are included in the upload, they will be identified and will not upload.
 - You will receive a warning if a selected document or folder already exists in the destination location. As part of this process, you will be asked to **Rename** the item, mark it as a **New Version** of the previous document or **Don't Upload**.
 - Empty folders will upload to Firm Central as part of the desktop to desktop transfer option.
- To receive an update on the upload status of the files and folders, you can access the Firm Central desktop system tray in the footer. Right click the **Firm Central Desktop Icon** in the footer and the system status tray will open.
 - A list of files and folders waiting to upload will appear. The queue will show the number of items awaiting upload along with the list of files and folders.
 - You may view a list of items that did not upload due to error by clicking on the **Error Report** button.
- As documents are uploaded, they can be accessed and opened in their native formats.

NOTE: It may take up to 24 hours for the documents to be indexed and available for search due to the bulk import process, which allows for the upload of a large number of items at one time.

