

TOP 10 STEPS TO GET STARTED WITH FIRM CENTRAL

1 Access Firm Central™.

After you've been given access to Firm Central, you'll receive an email with a registration key. Follow the instructions to add your Firm Central registration key to your existing OnePass account, or create a OnePass account and add your Firm Central registration key to your new account. Then access Firm Central at firmcentral.westlaw.com and fill in your profile.

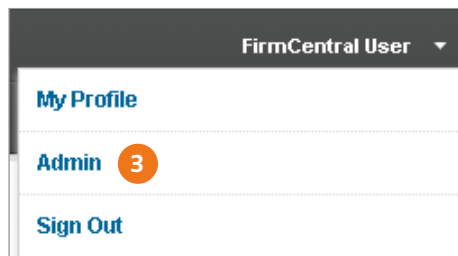
Note: If you don't receive an email with the registration key, do one of the following:

- Contact your firm's Firm Central administrator, who can access My Account from the Admin section of Firm Central and add users to Firm Central.
- Contact Firm Central Support at 1-800-328-4880 and press 1 for Customer Service and Billing.

2 Install the desktop integration plug-in.

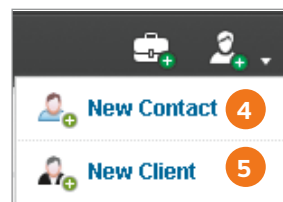
Firm Central enables you to add matter folders so you can organize and search all of your legal work in a single, secure location and collaborate with team members. Desktop integration provides seamless access to your Firm Central folders and documents from Microsoft® Outlook® and Windows® Explorer. If you install the plug-in, you can also view Outlook appointments and tasks from the respective matters in Firm Central. Be sure to install the desktop plug-in to take advantage of these capabilities.

To download the plug-in, go <http://info.legalsolutions.thomsonreuters.com/software/firm-central/>.



3 Admin users:

Sign in as Admin from the drop-down menu by your name and then set up storage alerts and default matter permissions, add users, link your Time and Billing account if you're a subscriber, and select the calendar settings your firm wants to use (either Outlook integration or the Firm Central Web calendar).



4 Add contacts.

Only the *First Name* and *Last Name* fields are required.

5 Add clients.

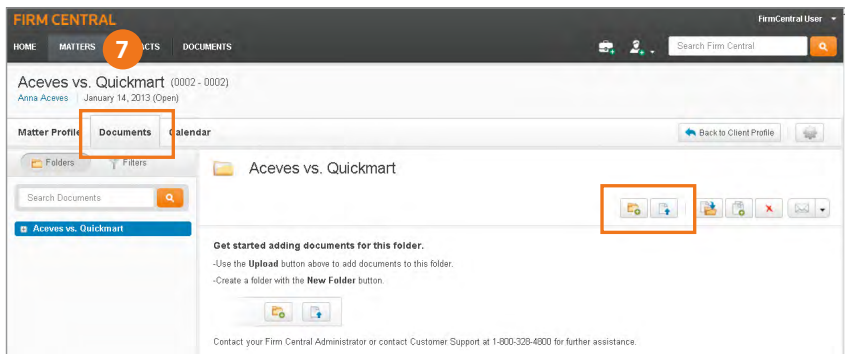
Only the *First Name* and *Last Name* fields are required.



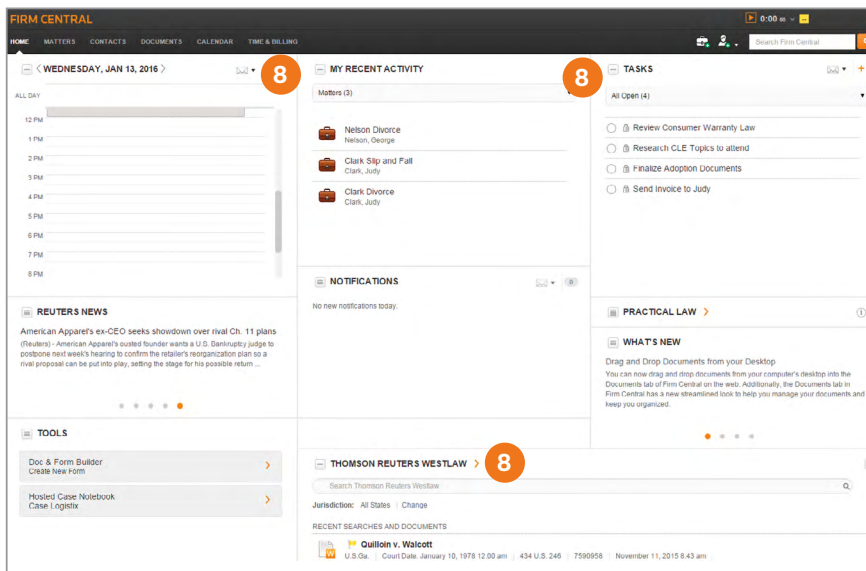
6 Add matters.

Only the *Matter Name*, *Date Opened*, and *Client* fields are required.

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- 7 Upload and organize documents in your matter folders.
Create subfolders. Open your documents in the document viewer. Notice the KeyCite® flags and links. As you review documents, take advantage of adding notes and highlighting for your own future reference.



- 8 Review the tools on your homepage, add tasks for your own use, assign tasks to others, and conduct legal research for your matter using the Thomson Reuters Westlaw™ widget on your homepage. Save research documents or snippets to your matter folder directly within Westlaw®.

- 9 Access Microsoft Outlook to see the Firm Central integration with Outlook. Drag relevant emails to the matter folders you created in Firm Central.
- 10 Go to Windows Explorer on your computer to see the Firm Central integration with your desktop. Drag any additional documents and folders to your matter folders that you want to include with the matter and share with others on the Matter Team.

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24/7 ASSISTANCE

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