FIRM CENTRAL

WORKING WITH DOCUMENTS GUIDE

THOMSON REUTERS™

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Firm Central™ gives you and other team members easy access to documents. Document tools, such as notes and highlighting, help you be more productive by keeping your analysis and information together. KeyCite® flags and links to WestlawNext® allow you to work more efficiently by showing you the status of cited references directly in your documents.

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CUSTOMER SUPPORT

Customer Service
1-888-287-8537
customerservice@thomsonreuters.com
Hours: 7 a.m.- 8 p.m. (CST), Monday-Friday

Reference Attorneys
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Customer Technical Support
1-888-287-8537
techsupport@thomsonreuters.com

SUPPORTED DOCUMENT TYPES AND FILE SIZES

Individual files may not be larger than 75MB.

You can upload the following file types and they will be full text searchable and available in the Document Viewer up to 40 MB. The Document Viewer displays KeyCite flags and links to WestlawNext from authority cited within your documents. It also enables you to add notes and highlights to documents.

Note: These file types are available only in the original file format if they are from 40MB to 75MB in size. They will not appear in the Document Viewer. Search is also limited to searching the document title, name of user who uploaded the document and date of upload.

- Microsoft Word (.doc, .docx., .docm, .dot)
- WordPerfect (.wp and .wpd)
- Text (.txt)
- Rich Text Format (.rtf)
- Microsoft Outlook Message (.msg and .eml)
- Web (.htm and .html)
- Portable Document Format (.pdf)
  Note: View scanned documents that have been saved as PDF files by clicking **Open Original** in the document viewer.

You can upload the following file types to Firm Central but you cannot view them with the Document Viewer. When you view these files from within Firm Central, they open in their native applications, e.g., Microsoft Excel. Search is limited to file title, name of user who uploaded the file and the file upload date. The full-text of the file is not searchable.

- Microsoft Excel (.xls and .xlsx)
- Microsoft PowerPoint (.ppt and .pptx)
- Graphics files:
  - .tif and .tiff
  - .bmp
  - .jpe and .jpg and .jpeg
  - .gif
  - .png
  - .jfx
- Apple (.key, .numbers, .pages)
- Windows Media (.wma, .wmv)
- Audio Visual Interleave (.avi)
- Audio for Windows (.wav)
- QuickTime Movie (.MOV)
- Moving Pictures Experts Group (.MPG, .MP2, .MP3)
- MP4 (.MP4, .M4A)
- Condensed (.ZIP)

THE DOCUMENTS TAB

The Documents tab is a repository of all of the documents for all of the matters. It does not include the matter details.
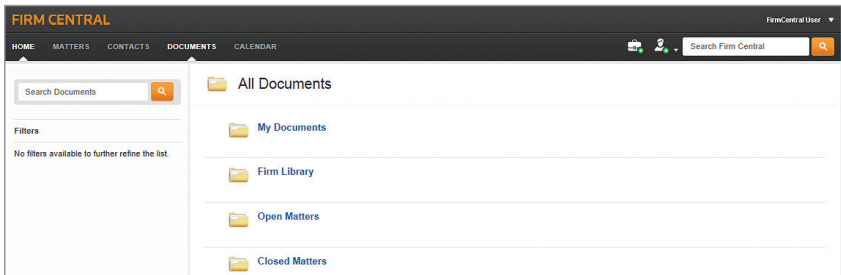
1 Click the **Documents** tab in the Firm Central header to browse documents across all clients and matters. Four primary document folders help keep you organized; My Documents, Firm Library, Open Matters, and Closed Matters.

2 The left column provides available filters as a primary folder is selected and there are individual document to filter.

3 Both the Open Matters and Closed Matters folders are organized alphabetically by client with subfolders organized alphabetically by the matters for each client.

4 A client may have more than one matter.

5 A client who does not have any open matters does not appear in the Open Matters folder. A client who does not have any closed matters does not appear in the Closed Matters folder. The client continues to exist in your Contact/ Client directory. The client appears in the Documents directory when you have at least one open or closed matter for that client.

You cannot see any matters in the Documents directory to which you have been denied access.

ADD DOCUMENTS TO A MATTER FROM THE DOCUMENTS TAB
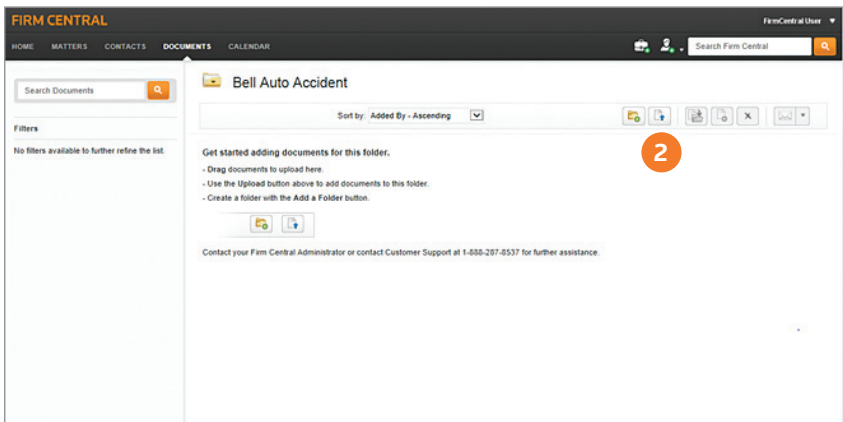
1 Select **My Documents**, **Firm Library**, **Open Matters**,or **Closed Matters** folder or subfolder from Open Matters or Closed Matters.

2 Click the **Upload a Document** icon on the right side of the page.

3 The file upload page for the matter is displayed. Click **Add Files** to access the file(s) you want to upload.
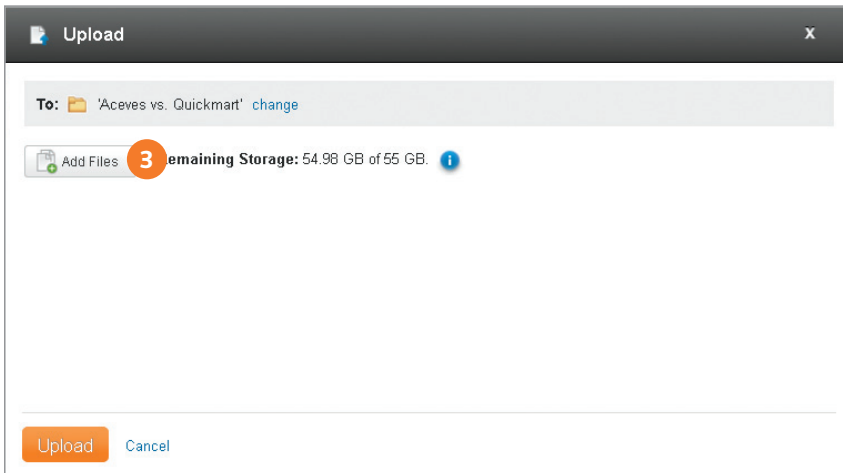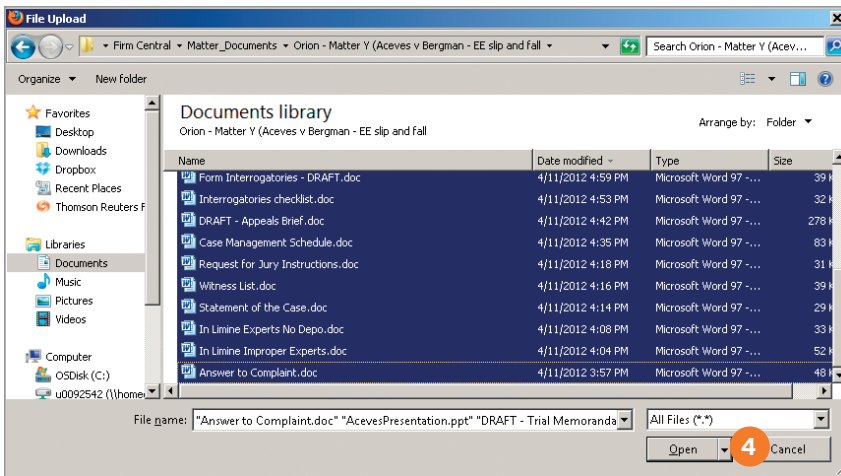
4 Select the document(s) you want to upload to your matter and then click **Open**.

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 document.

**5** The documents are displayed on the file upload page for the matter.

   a. Upload additional files by clicking **Add Files** and accessing the files. This is especially useful if you want to upload files from a different folder.

   b. Review the list. If the list contains a file that you determine you do not want to upload, click the **red X** to delete it from the file upload page.
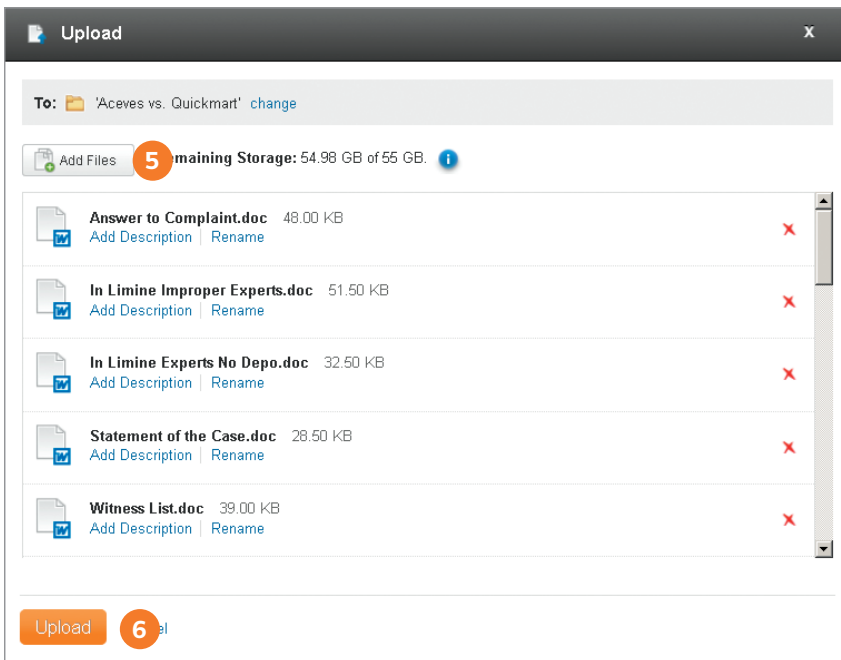
6 Click **Upload**.
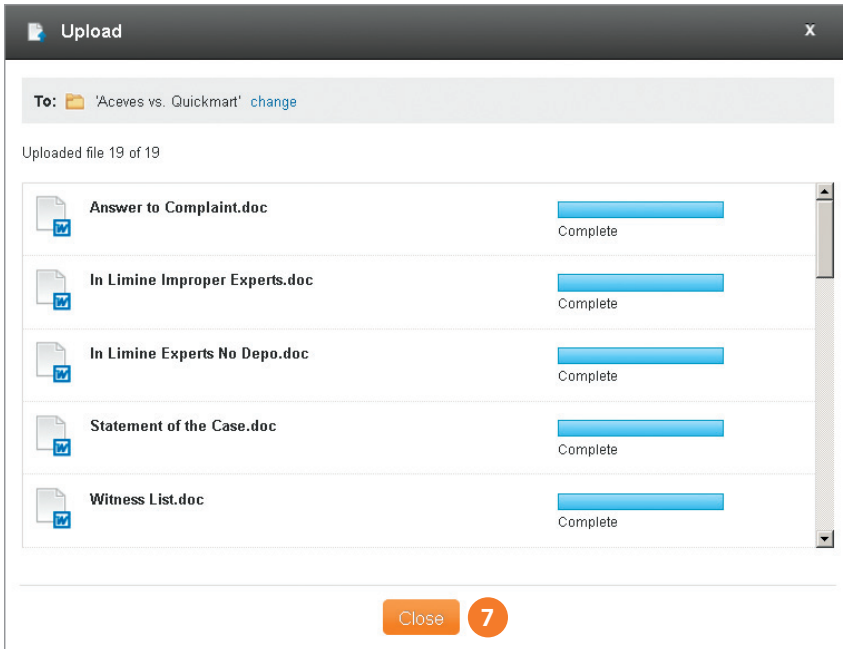
**7** Firm Central shows the progress of your files uploading to the matter. As Firm Central uploads your documents, it applies indexing technology from WestlawNext to add KeyCite status flags to your cited authority and links to the full-text documents on WestlawNext. You need a subscription to WestlawNext to access KeyCite and the full text of your cited references. After all of your files are uploaded, click **Close**.

ORGANIZING MATTER DOCUMENTS FROM THE DOCUMENTS TAB
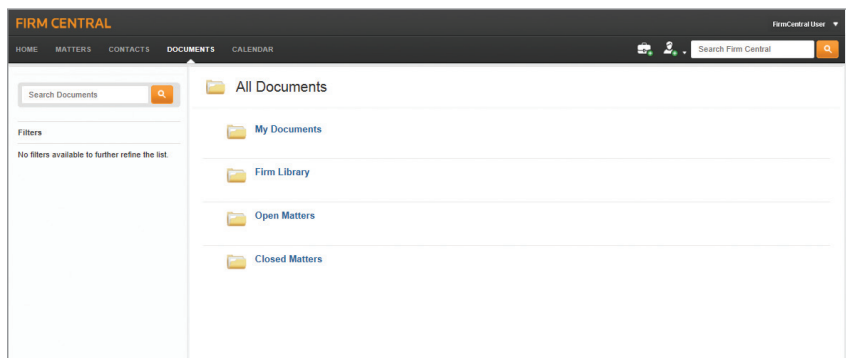
Create a Folder

1 Select the folder or subfolder from All Documents on the Documents tab.

2 Click the **Add a Folder** icon on the right side of the page. The Create Folder screen appears.

3 Type the folder name in the text box and click **Save**.

4 The folder appears above the matter documents.
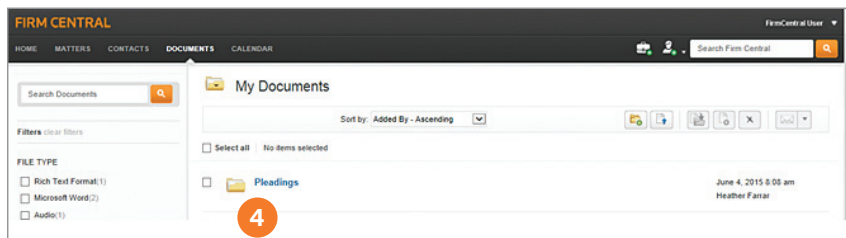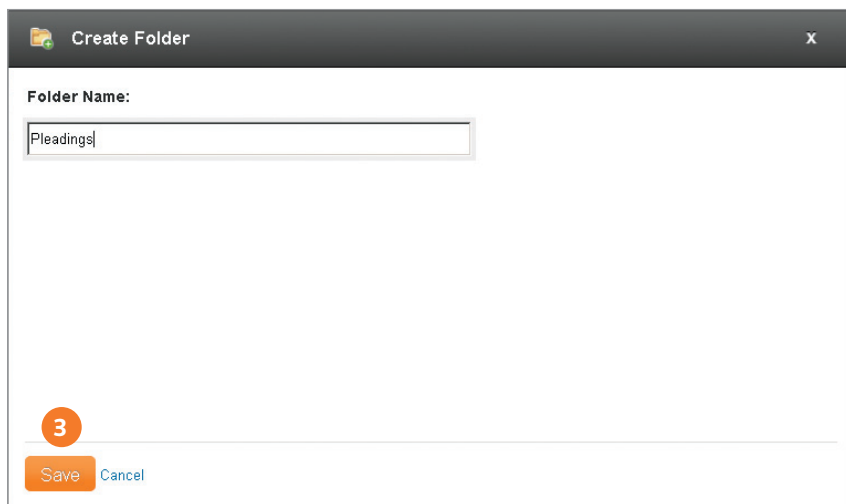
Move Documents

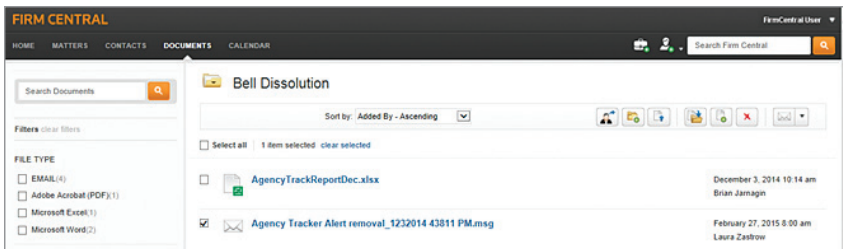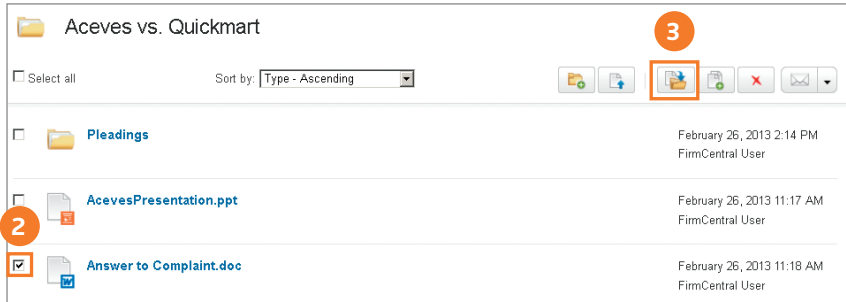You can move documents from one matter folder to another using either the *Move Selected Items* button or drag-and-drop.

Note: You cannot move documents to a client folder. You must expand the client folder to display the destination matter folder.

Move Selected Items Button

1 Select the matter folder or subfolder from the Folders list on the Documents tab. The matter documents are listed on the right side of the page.

2 Select the check box preceding each document you want to move.

3 Click the **Move Selected Items** icon on the right side of the page.

4 The Move box appears listing the available folders. If necessary, click **Show all matters** to display all of your matter folders. Highlight the destination folder and then click **Move**.

5 A message appears confirming you moved the document(s) to the destination folder. Click **Close**.
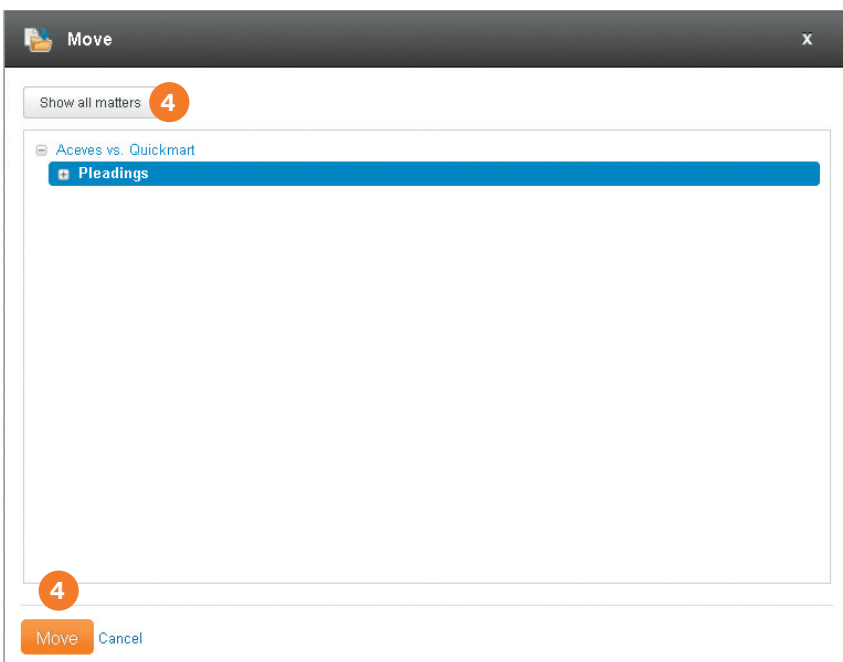
Move Using Drag-and-Drop

1 Select the matter folder or subfolder from the Folders list on the Documents tab. The matter documents are listed on the right side of the page.
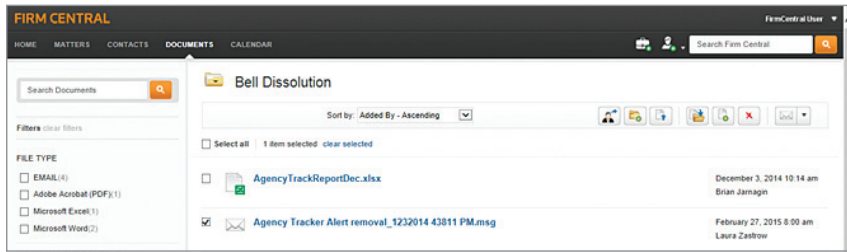
2 If you want to move a single document to another matter folder, hold your mouse on the document icon (not the title) and drag it to the destination matter folder.

3 If you want to move more than one document from the same folder to another matter folder, select the check box preceding each document you want to move. Then hold your mouse on one of the document icons to drag all of the selected documents to the destination matter folder.

4 When you release the document(s) on the destination folder, a menu appears. Click **Move**.

5 A message appears confirming you moved the document(s) to the destination folder. Click **Close**.
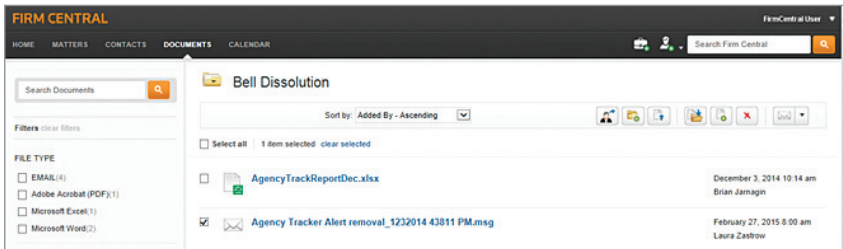
Copy Documents

You can copy documents from one matter folder to another using either the *Copy Selected Items* button or drag-and-drop.

Note: You cannot copy documents to a client folder. You must expand the client folder to display the destination matter folder.

Copy Selected Items Button

1 Select the matter folder or subfolder from the Folders list on the Documents tab. The matter documents are listed on the right side of the page.

2 Select the check box preceding each document you want to copy.

3 Click the **Copy Selected Items** icon on the right side of the page.

4 The Copy box appears listing the available folders. If necessary, click **Show all matters** to display all of your matter folders. Highlight the destination folder and then click **Copy**.

5 A message appears confirming you copied the document(s) to the specified folder. Click **Close**.
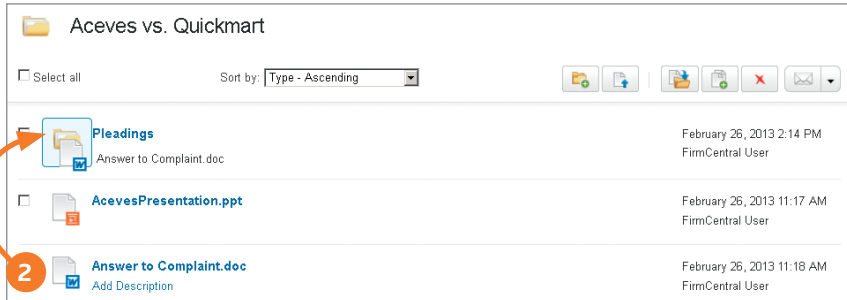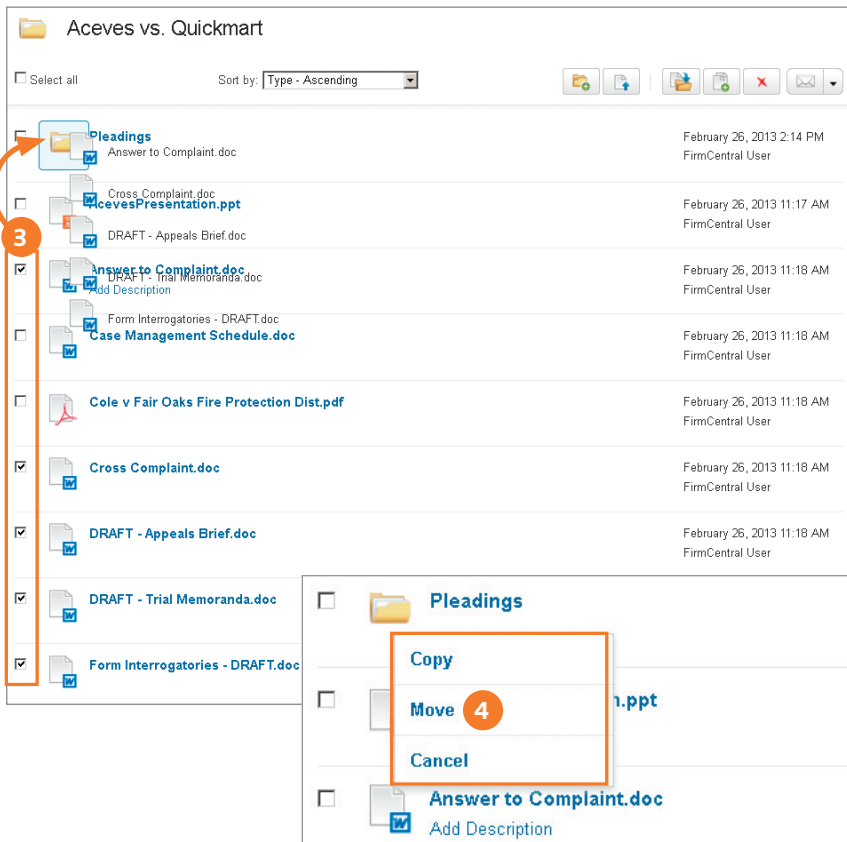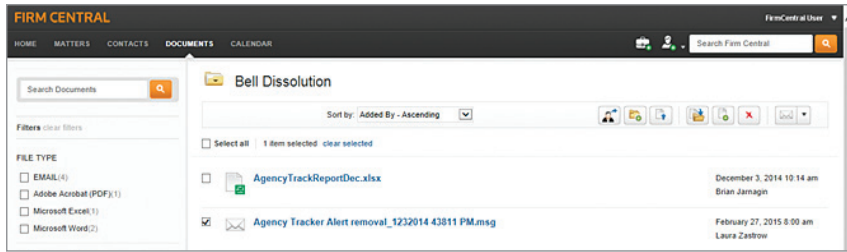
Copy Using Drag-and-Drop

1 Select the matter folder or subfolder from the Folders list on the Documents tab. The matter documents are listed on the right side of the page.

2 If you want to copy a single document to another matter folder, hold your mouse on the document icon (not the title) and drag it to the destination matter folder.

3 If you want to copy more than one document from the same folder to another matter folder, select the check box preceding each document you want to copy. Then hold your mouse on one of the document icons to drag all of the selected documents to the destination matter folder.

4 When you release the document(s) on the destination folder, a menu appears. Click **Copy**.

5 A message appears confirming you copied the document(s) to the destination folder. Click **Close**.
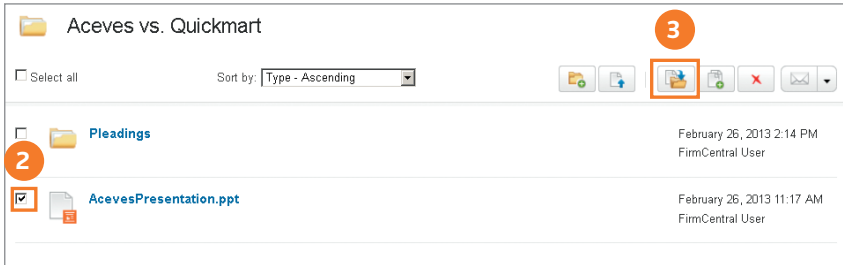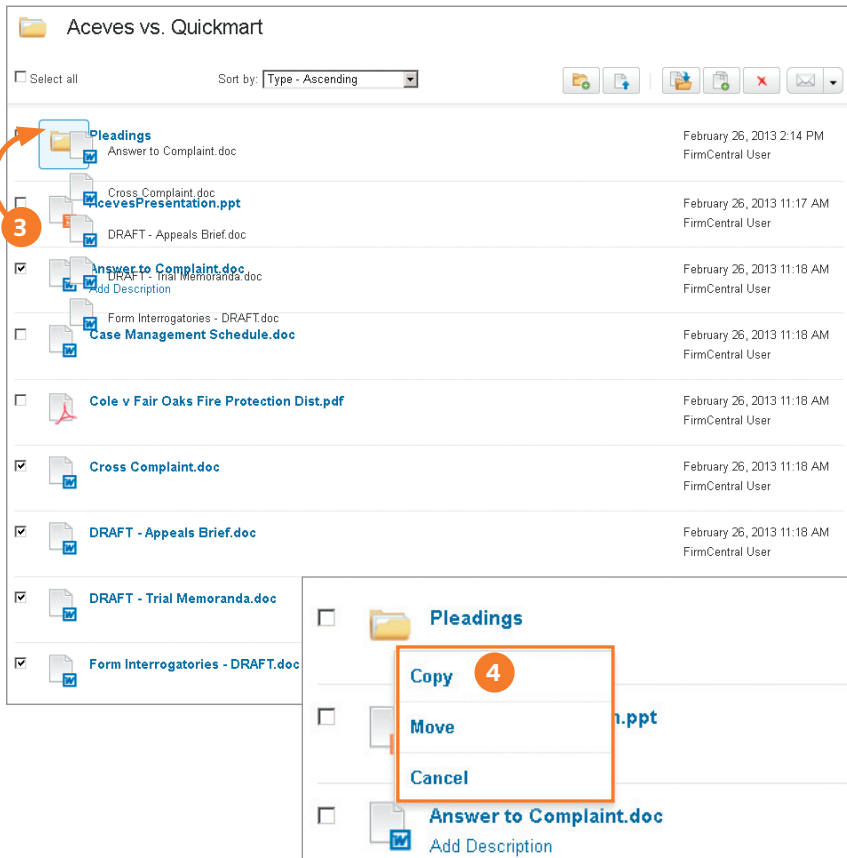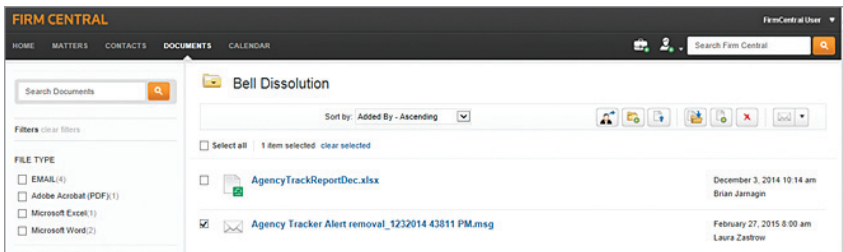
Delete Documents
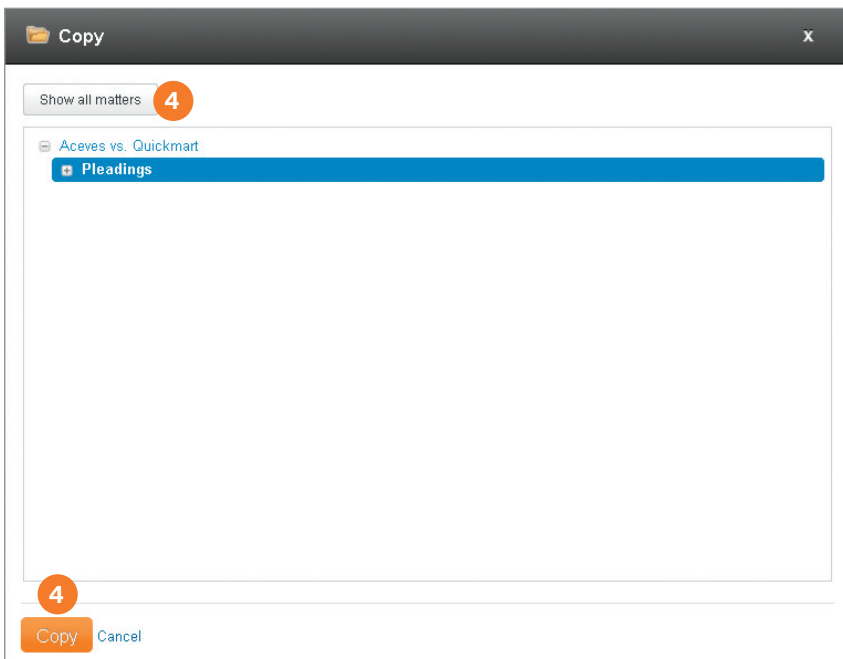
1 Select the matter folder or subfolder from the Folders list on the Documents tab. The matter documents are listed on the right side of the page.

2 Select the check box preceding each document you want to delete.

3 Click the **Delete Selected Items** icon on the right side of the page.

4 A confirmation box appears. Click **OK** if you want to proceed with deleting the selected items.

5 A message appears confirming you deleted the document(s). Click **Close**.
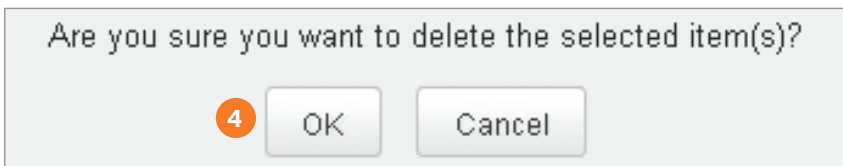
ORGANIZING DOCUMENTS VIA THE DESKTOP INTEGRATION
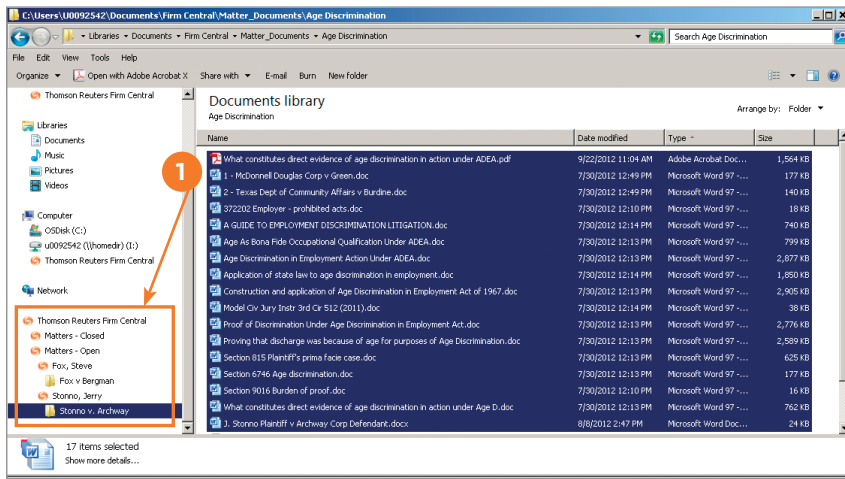
Use Drag-and-Drop to Copy or Move Documents in Your Matters Within Windows Explorer

1 You can copy documents to your matter folders directly from your desktop when you have the Firm Central desktop integration installed. 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 matter folders.

To copy documents from a folder that's on your computer to a matter folder in Firm Central, select one or more documents and drag them to the matter folder listed below *Firm Central*.

The documents are copied to the matter folder. Now, any of the matter participants can access these documents. Their level of access depends on the roles assigned to them as participants.

To move documents between Firm Central folders, select one or more documents in a matter folder and drag them to the destination matter folder.

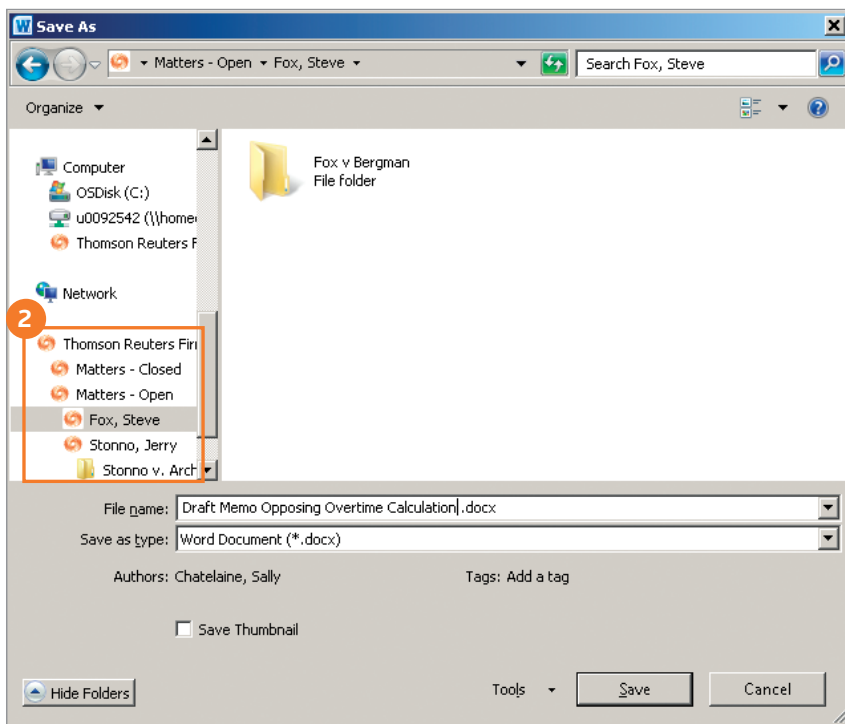**Note:** To select all of the documents in a row, click the first document, hold down the **Shift** key, and then click the last document. If the documents are not in a row, click the first document, hold down the **Ctrl** key, and then click each additional document.

Save a Document Directly to a Matter Folder from Your Word-Processing Application

2 The desktop integration enables you to save a Microsoft Word, Corel WordPerfect, or Adobe PDF document to a Firm Central matter folder just as you would save it to any other folder. You can also open a document from a matter folder within your word processor just as you would open any other document. Choose **Save** or **Open** in your word processor and select the folder from the Firm Central section.

SEARCHING DOCUMENTS
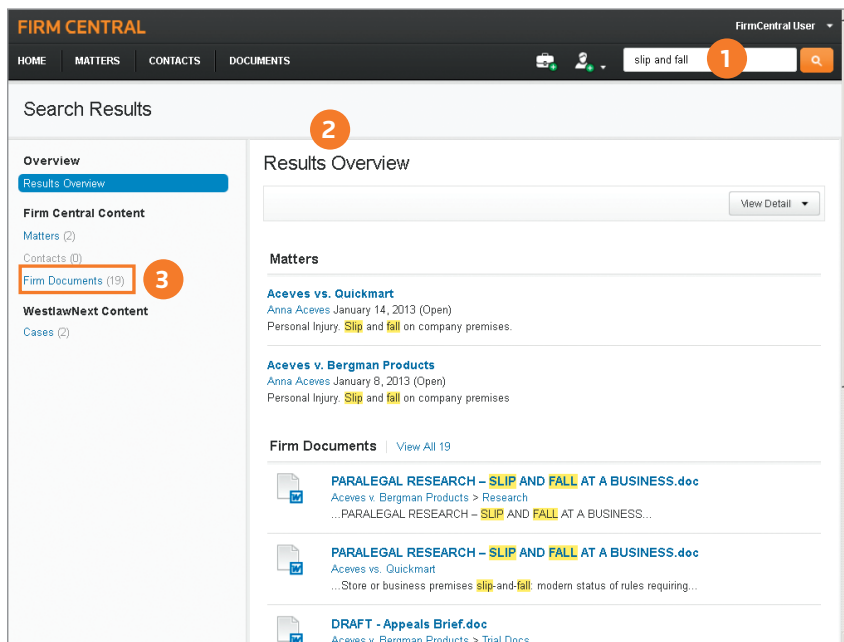
Search Documents in All Matters Using Global Search

Global Search in Firm Central makes it easy to find documents, matters, and work authored by specific people. All you need to do is enter a Terms and Connectors search in the global search box at the top right corner of any page.

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.

1 Enter your search terms in the global search box to search all matters.

Note: If you have been denied access to any matters, they will not be included in your search.
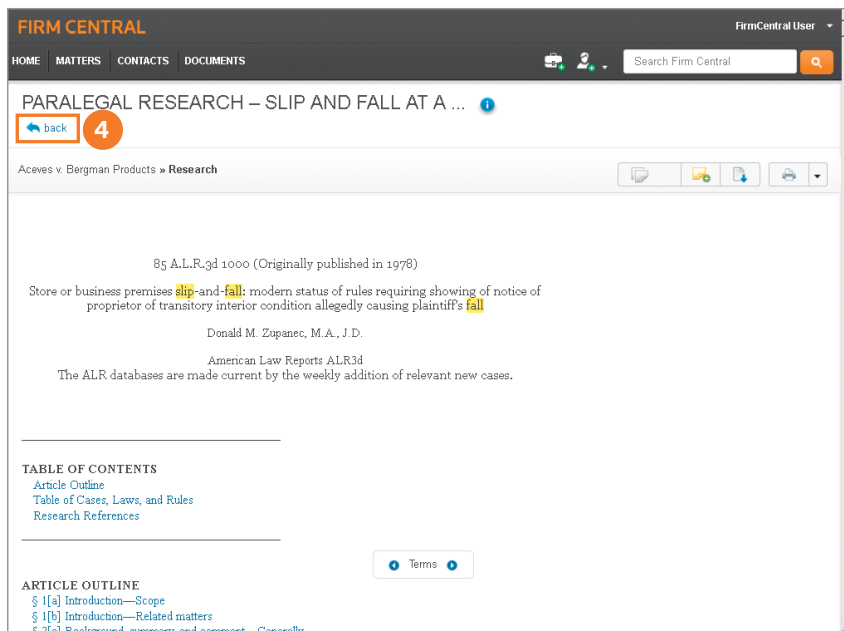
2 The result contains an overview of all results, matters, documents, contacts, and WestlawNext documents matching your search criteria.

3 Click the **Firm Documents** category on the left to see its result. Firm Central highlights the search terms in both the document title and in snippets from the text so you can easily identify the documents you need.

4 The links at the top of a result document make it easy to navigate the result. You can link to the matter associated with the document or click **Back** to return to the result.
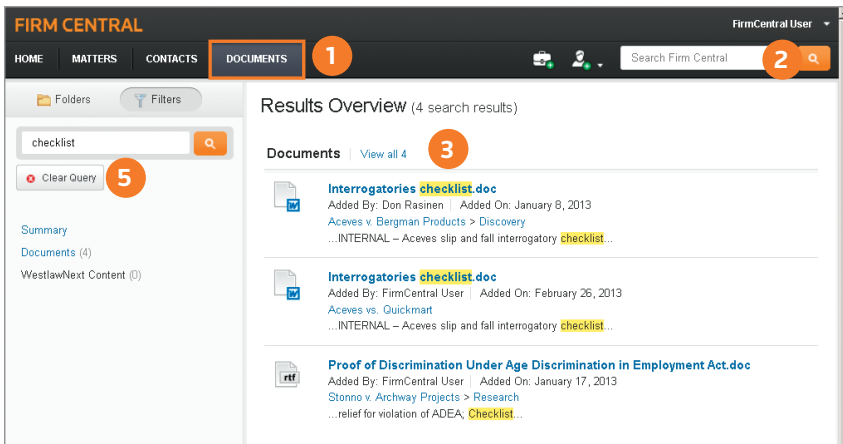
Search Documents in all Matters at the Documents Tab

Whereas Global Search runs your search across matters, documents, and contacts, Search in the Documents tab runs your search across documents only. Searches in the Documents tab also search the full text of documents in addition to the documents' metadata.

1 Click the **Documents** tab.

2 Enter a Terms and Connectors search in the Search Documents box on the Folders list and then click the search button (magnifying glass).

3 The documents that satisfy your search are displayed on the right.

4 The links at the top of a result document make it easy to navigate the result. You can link to the matter associated with the document or click **Back** to return to the result.

5 To clear the result and display all documents, click **Clear Query** below the Search box.
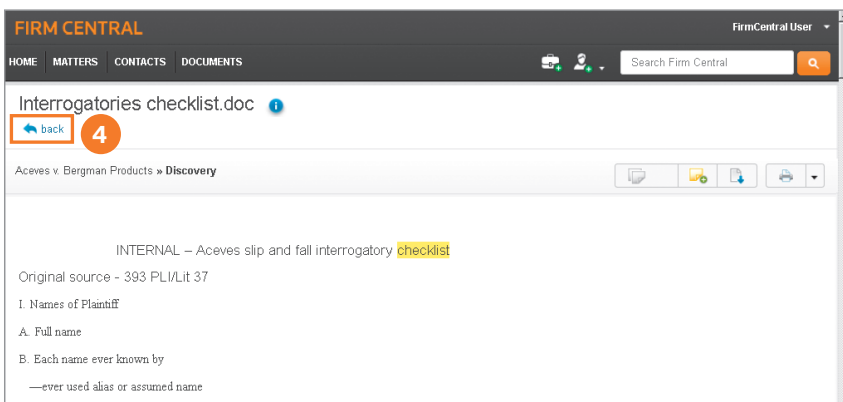
Search Documents in a Specific Matter

1 Limit your search to the documents within a specific matter by using the search box in the Documents subtab for that matter.
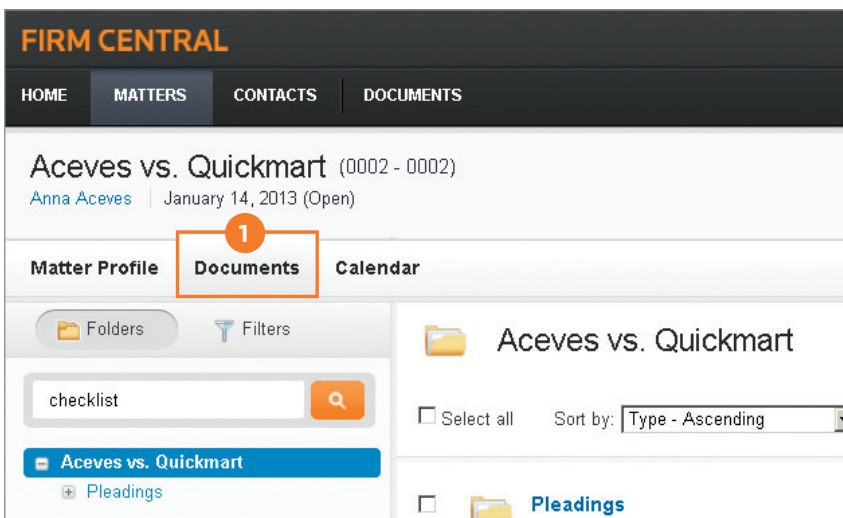
Terms and Connectors

Firm Central uses Terms and Connectors to search across matters. Although Firm Central recognizes a space between terms as the OR connector, if you enter a search such as *age discrimination*, the result includes documents containing *age discrimination*.

If you want more precise searching, you can use the standard connectors between your terms:

- /p (in the same paragraph)
- /n (within n words of each other)
- " " (exact phrase)
- * (universal character—used anywhere in a term)
- ! (root expander—used at the end of a term)

Supported Document Types

You can search the full text of the following file types. Firm Central displays snippets of terms from the body of the result documents as well as the document title in the result list.

- Microsoft Word (.doc and .docx)
- WordPerfect (.wp and .wpd)
- Portable Document Format (.pdf) other than scanned and password-protected documents
- Text (.txt)
- Rich Text Format (.rtf)
- Microsoft Outlook Message (.msg)
- Web (.htm and .html)

You can search the metadata (e.g., document title) of the following file types. Firm Central highlights search terms from the document title in the result list.

- Microsoft Excel (.xls and .xlsx)
- Microsoft PowerPoint (.ppt and .pptx)
- Scanned documents that have been saved as PDF files
- Graphics files:
  - .tif and .tiff
  - .bmp
  - .jpe and .jpg and .jpeg
  - .gif
  - .png
  - .jfx

DOCUMENT FEATURES

When you open a supported document type in Firm Central, such as Word, WordPerfect, or PDF, it is displayed in a Document Viewer that includes several features to help you be more productive.
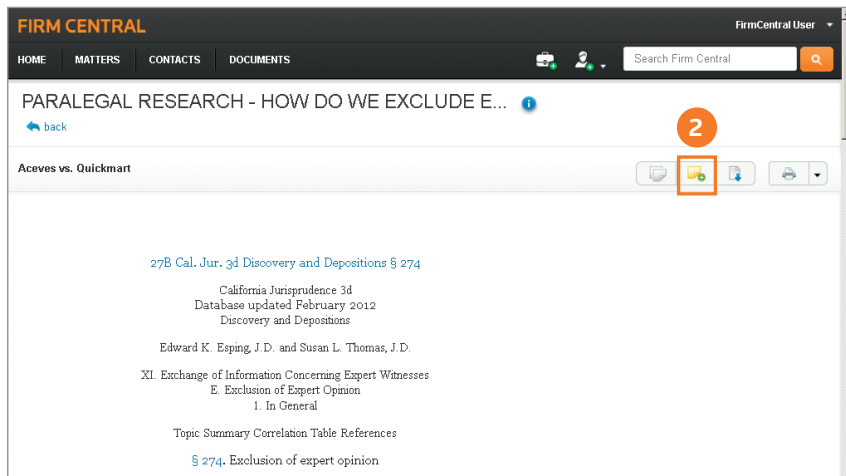
Add Notes or Highlights to Documents

Keep your notes and analysis attached to documents in Firm Central for your own future reference. Add notes and highlights to the document so you can keep your thoughts and analysis in the matter folder in Firm Central along with all of the other information related to that matter. Your source document remains in its original format without the annotations.

1 Open a document in Firm Central.

2 Add notes to the top of a document by clicking the **Add Notes** icon.

3 Enter your note and then click **Save**.

4 The note appears at the top right of the page with links to *Edit* or *Delete* the note. You can collapse the note into the Notes banner by clicking the **arrow** on the right of the banner.

West's Key Number Digest, Pretrial Procedure 39 to 41, 45, 224, 313

Except as otherwise provided, on objection of any party who has made a complete and timely compliance with the exchange requirements,1 the trial court must exclude from evidence the expert opinion of any witness that is offered by any party who has unreasonably failed to do any of the following:2

• timely list that witness as an expert
• submit an expert witness declaration
• timely produce reports and writings
• make that expert available for a deposition

Add a Note

Highlight

West's Key Number Digest, Pretrial Procedure 39 to 41, 45, 224, 313

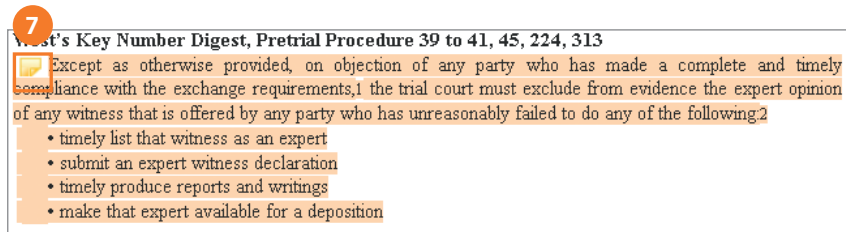Except as otherwise provided, on objection of any party who has made a complete and timely compliance with the exchange requirements,1 the trial court must exclude from evidence the expert opinion of any witness that is offered by any party who has unreasonably failed to do any of the following:2

• timely list that witness as an expert
• submit an expert witness declaration
• timely produce reports and writings
• make that expert available for a deposition

Trial court reasonably precluded plaintiff's experts, in nuisance action arising out of contamination of downhill property by fuel oil from uphill property, from offering opinions at trial that experts had not given in their depositions, particularly as to whether soil contamination was reasonably abatable so as to permit recovery for a continuing nuisance and avoid statute of limitations for a permanent nuisance. West's Ann.Cal.C.C.P. §§ 338(b), 2034.010 et seq. McCoy v. Gustafson, 2009 WL 4803344 (Cal. App. 6th Dist. 2009).

A party's expert may not offer testimony at trial that exceeds the scope of his deposition testimony if the opposing party has no notice or expectation that the expert will offer the new testimony, or if notice of the new testimony comes at a time when deposing the expert is unreasonably difficult. West's Ann.Cal.C.C.P. § 2034.210 et seq. Easterby v. Clark, 171 Cal. App. 4th 772, 2009 WL 266143 (2d Dist. 2009).

5 Highlight text within a document by selecting the text you want to highlight and then choosing **Highlight** from the pop-up menu.

6 Add notes within a document by selecting the text to which you want to attach the note and then choosing **Add a Note** from the pop-up menu. Enter your note and then click **Save**.

7 A note icon appears to the left of the selected text. Click the **note** icon to view, edit, or delete the note. Click anywhere on the page to close the note.
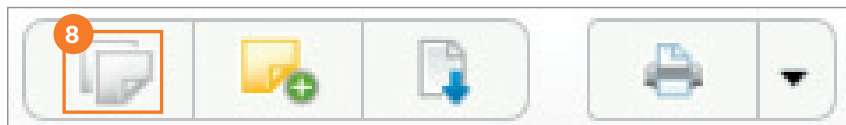
8 Click **Hide/Show Notes** in the document tool bar to view only the document. Click the **Hide/Show Notes** icon again so you can view the annotations.

View KeyCite Status Flags, Access KeyCite and Full-Text Documents on WestlawNext
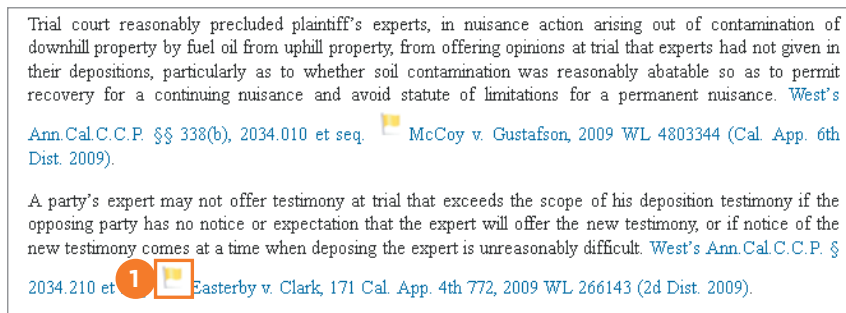
1 Firm Central uses indexing technology from WestlawNext to add KeyCite status flags and links to the full-text documents on WestlawNext from the cited authority within the documents you upload. You need a subscription to WestlawNext to access KeyCite and the full text of your cited references.

KeyCite flags show you whether the cited authority is still good law. Click the flag to view the citation's Negative Treatment on WestlawNext. Click the link to the citation to view the full-text document on WestlawNext.

DELETING AND RESTORING ITEMS
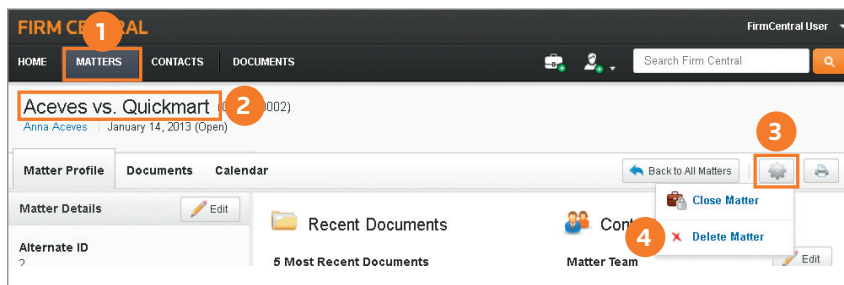
Delete a Matter

1 Click the **Matters** tab in the Firm Central header.

2 At either the All Matters or My Matters tab, click the name of the matter you want to delete. The matter dashboard is displayed.

3 At the matter dashboard, click the **gear icon** in the upper right corner.

4 Click **Delete Matter** from the drop-down.

5 Click **OK** to confirm you want to delete the matter.
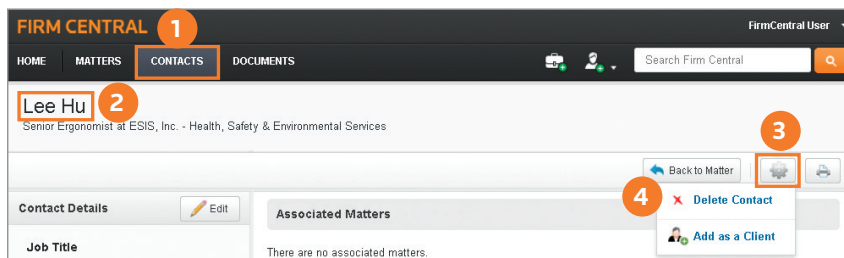

Delete a Contact

1 Click the **Contacts** tab in the Firm Central header.

2 At the All Contacts tab, click the name of the contact you want to delete. The contact's page is displayed.

3 At the contact's page, click the **gear icon** in the upper right corner.

4 Click **Delete Contact** from the drop-down.

5 Click **OK** to confirm you want to delete the contact.
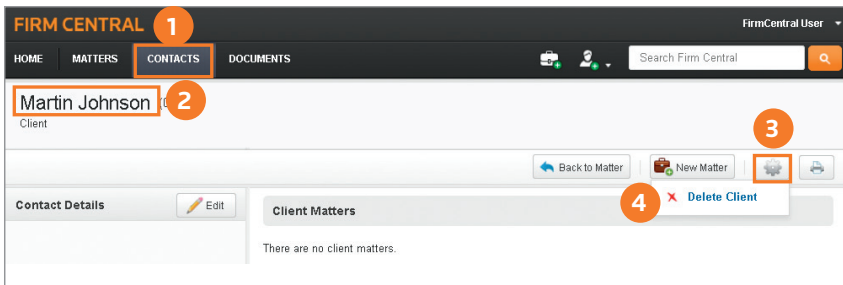
Delete a Client

**Note:** You cannot delete a client if Firm Central contains matters for the client.

1 Click the **Contacts** tab in the Firm Central header and then click the **Clients** tab.

2 At the Clients tab, click the name of the client you want to delete. The client's page is displayed.

3 At the client's page, click the **gear icon** in the upper right corner.

4 Click **Delete Client** from the drop-down.

5 Click **OK** to confirm you want to delete the client.
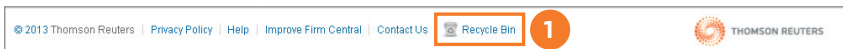
Restore Items from the Recycle Bin— General User

You can restore items you delete as long as an administrator has not purged them from the system.

1 Click **Recycle Bin** in the Firm Central footer.

2 Find your item and click **Restore**.

3 If you have a lot of items in the Recycle Bin, filter them by category and/or date deleted.
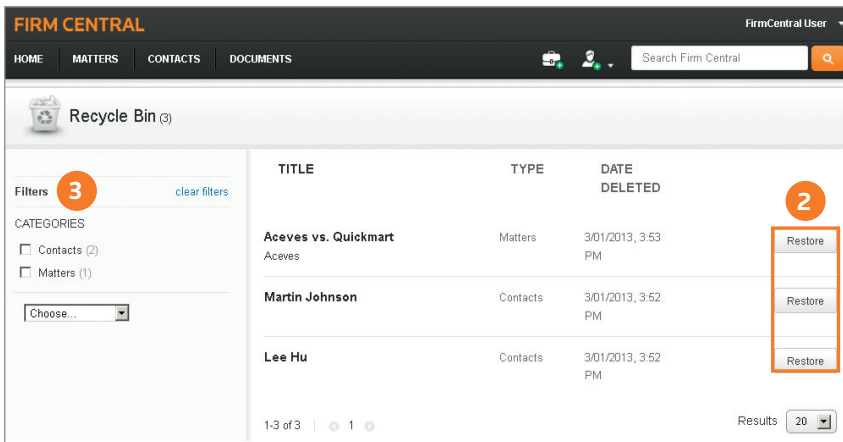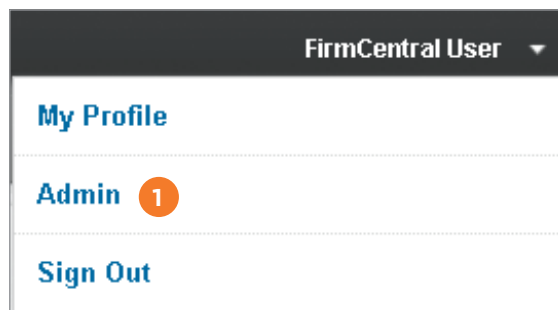
Notes about Restoring Matters—General Users

Firm Central has a smart restore, which means it returns the matter to its previous location as long as the matter still exists and you still have permissions to access it. If Firm Central cannot identify the previous location, it prompts you to select the location where you want to restore the matter.

Firm Central does not retain the permissions you assigned to a matter when you restore the matter. After you choose to restore a matter, Firm Central displays the firm's default permissions, which you can modify before completing the restoration process.

If you deleted both a client and one or more matters for that client, restoring the matter restores the client along with it.

If another user deleted the client or an administrator purged the client, you cannot restore a matter you deleted for that client.

Restore and Purge Items from the Recycle Bin—Administrative User

Administrators can restore or permanently delete (purge) all items in the recycle bin.

Restore an Item

1. Sign in as an administrator by clicking the drop-down menu to the right of your name and choosing **Admin**.

2. Click **Recycle Bin** in the Firm Central footer.

3. Find the item and click **Restore**.

4. If you have a lot of items in the Recycle Bin, filter them by category and/or date deleted.
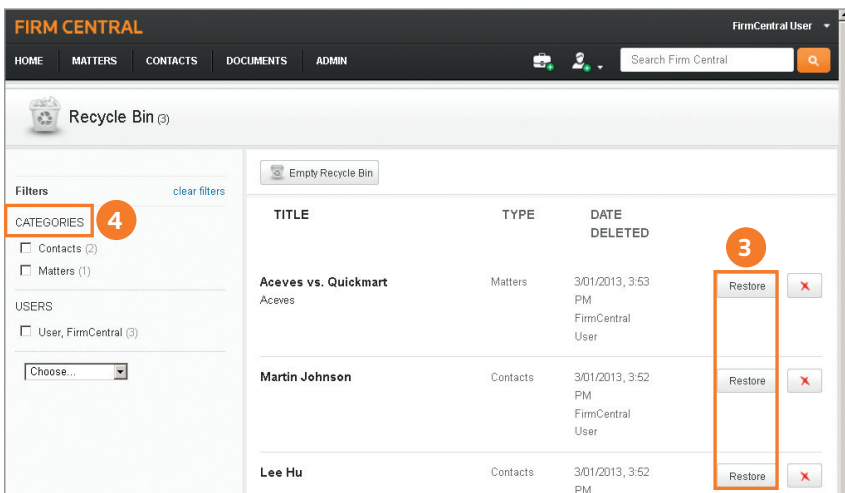
Notes about Restoring Matters—Administrator

Firm Central has a smart restore, which means it returns the matter to its previous location as long as the matter still exists. If Firm Central cannot identify the previous location, it will prompt you to select the location where you want to restore the matter.

Firm Central does not retain the permissions you assigned to a matter when you restore the matter. After you choose to restore a matter, Firm Central displays the firm's default permissions, which you can modify before completing the restoration process.

If one or more users have deleted both a client and one or more matters for that client, restoring the matter restores the client along with it.
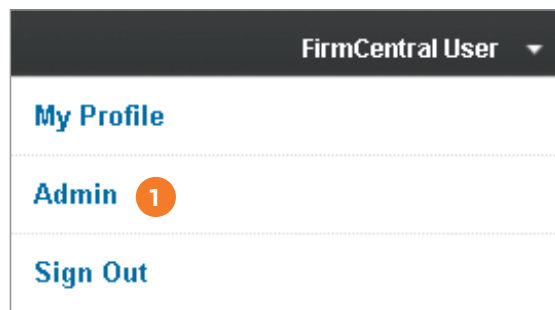
Purge an Item

1. Sign in as an administrator by clicking the drop-down menu to the right of your name and choosing **Admin**.

2. Click **Recycle Bin** in the Firm Central footer.

3. Find the item and click the **Delete** button.

4. Click **OK** to permanently delete the item.
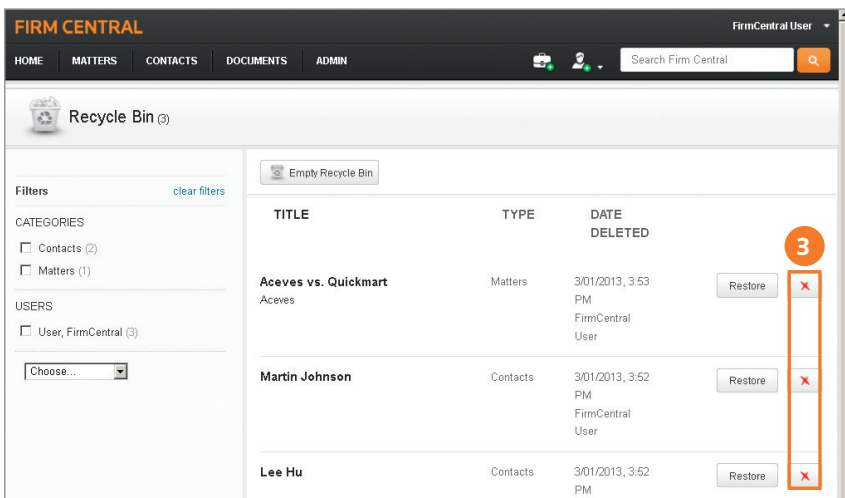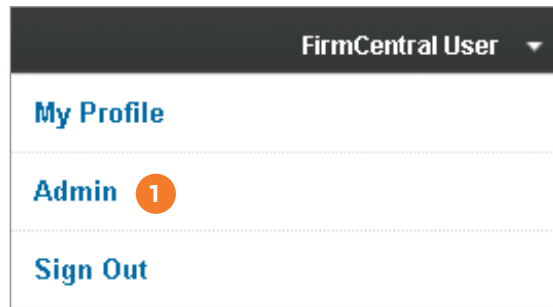
Note about Purging Clients

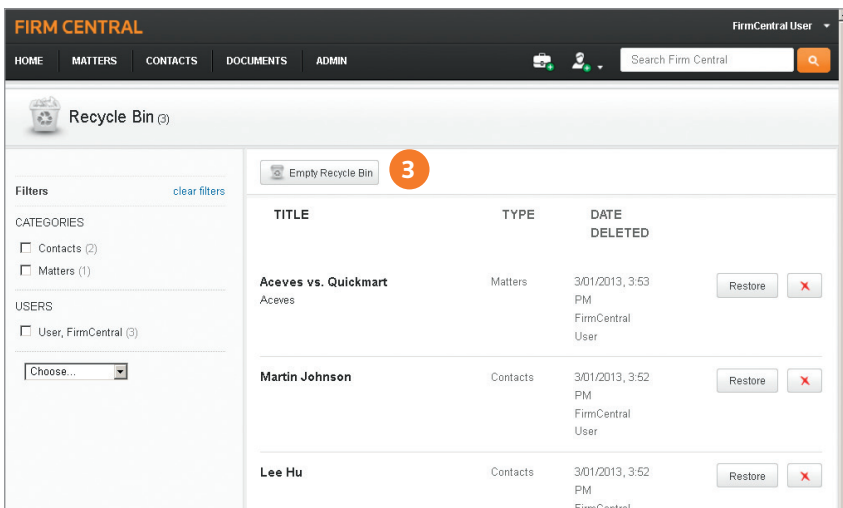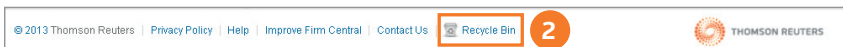If you purge a client, any deleted matters for that client are purged automatically.

Purge All Items for All Users

1 Sign in as an administrator by clicking the drop-down menu to the right of your name and choosing **Admin**.

2 Click **Recycle Bin** in the Firm Central footer.

3 Click **Empty Recycle Bin**.

4 Click **OK** to permanently delete every item in the recycle bin for all users.

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