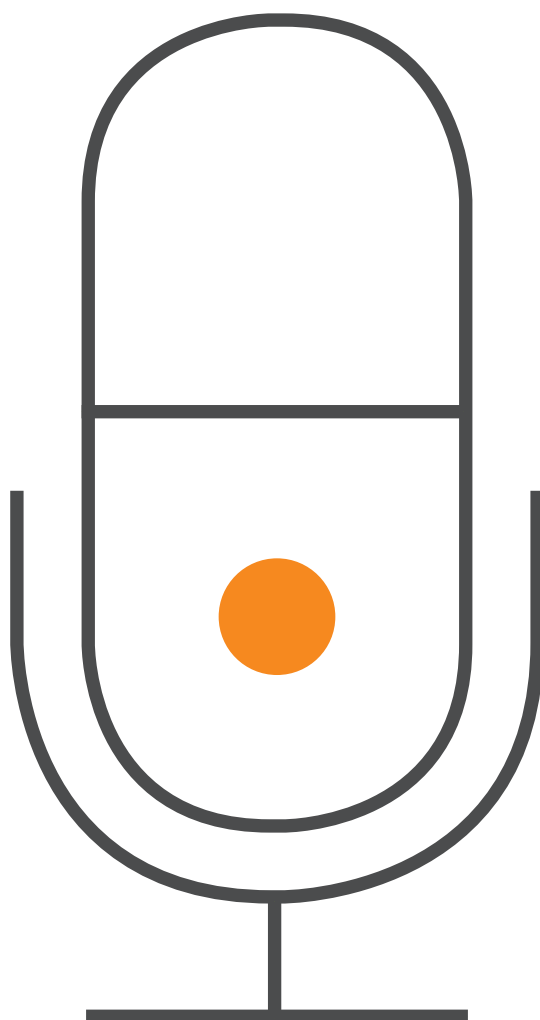


Firm Central

Frequently Asked Questions



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General overview

What is Firm Central?

Firm Central from Thomson Reuters is the only online matter management solution for sole practitioners and small law firms that connects you to your work. As you use Firm Central, you'll discover how it helps you accomplish more for your clients with less effort and stress.

What is matter management software?

Matter management software is designed to manage and streamline a law firm's workflow, bringing more efficiency and productivity. This includes efficient opening and closing of matters, client and other contact management, storage, search and collaboration on confidential matters and documents, task and legal diary management. Firm Central offers all of this and takes it a step further by featuring integration with other Thomson Reuters products such as the leading online legal Know How content provided through Practical Law.

Is Firm Central a document management system?

Firm Central provides light document management capabilities. Documents can be uploaded and shared among firm members. Permissions can be added to the Matter controlling who among the users can upload, view, edit and delete documents in the Matter. Firm Central has document versioning capability, so firms can store multiple iterations of a document within the system.

What does it mean to work in a hosted environment?

Working in a secure hosted environment means you are using a web or internet-based application (e.g. Facebook, Gmail or Salesforce.com). This means: 1) Applications are accessed via a browser and 2) files are stored within the application, not on your hard-drive. A small installation is required to sync calendars, Windows Explorer and Microsoft Outlook.

System requirements

What are the technical requirements for running Firm Central?

Browser

- Internet Explorer 9 or later
- Firefox 7.0 or later
- Safari 5.0 or later
- Google Chrome 7 or later

Hardware

- Personal computer with 1 GHz Dual Core or faster processor
- 1 GB of RAM
- 2 GB of available hard disk space
- Integration with Microsoft Outlook and Windows Explorer
- Windows 7 Home Premium (32-bit and 64-bit)
- Windows 7 Professional (32-bit and 64-bit)
- Windows 8 Professional (32-bit and 64-bit)
- Windows 8 Enterprise (32-bit and 64-bit)
- Microsoft Office 2007 (32-bit and 64-bit) (requires Service Pack 3)
- Microsoft Office 2010 (32-bit and 64-bit)
- Microsoft Office 2013 (32-bit and 64-bit)

Product overview

How do I access Firm Central?

Go to www.firmcentral.co.uk, then click on the Login button in the top right corner of the header image. This will take you through to the OnePass login and registration screen where you will be asked to enter your username and password.

How and why do I use permissions?

Permissions within Firm Central allow administrators to control who within the firm has access to upload, view, edit and delete matter content. This functionality enables greater security for the firm. Permissions can be assigned on a matter by matter basis.

What do the different permission settings mean?

Owner: Can create, edit, and delete Matters and Matter Documents.

Editor: Can edit Matter Details and add documents but cannot delete documents. Contributors cannot delete a matter.

Read Only: Can view all Matter information but cannot edit or delete documents.

Administrator: The Firm Administrator has full access to all matters, contacts, clients and documents in Firm Central. Additionally the Firm Administrator can create the Default Permission list for firm users, designate a storage notification limit and is the only person in the firm with the ability to permanently empty the Recycle Bin. Each law firm is encouraged to have more than one Firm Administrator for Firm Central. In the event an Administrator leaves the firm the remaining Administrator(s) will continue to have access to all matters, contacts, clients and documents.

Denied Access: User cannot see any portion of the Matter

Who can see deleted items?

The Recycle Bin allows Firm Central users to see the items they deleted. Administrators will be able to see all deleted items and also have permission to permanently delete items. Users can restore items from their respective recycle bins.

Uploading documents to Firm Central

Uploading files to Firm Central allows you to access and share information within your firm (based upon Matter permission) from anywhere an internet connection is available using any internet-enabled device (computer, tablet, smart phone). Files are uploaded via a secure connection and are encrypted to ensure the highest security possible. Thomson Reuters uses robust encryption and transport standards when performing transactions over the internet. Files are then stored in Thomson Reuters' state-of-the-art data centre.

What kind of files can be uploaded?

The following file types can be uploaded: .doc, .docx, .wp, .wpd, .pdf, .txt, .rtf, .msg, .htm, .html, .eml, .xls, .xlsx, .ppt, .pptx, .tif, .tiff, .bmp, .jpe, .jpg, .jpeg, .gif, .png, .jfx, .key, .numbers, .pages, .wma, .wmv, .avi, .wav, .mov, .mpg, .mp2, .mp3, .mp4, .mp4a and .zip.

What document types allow full text searching?

Full-text searching is available for .doc, .docx, .wp, .wpd, .pdf, .txt, .rtf, .msg, .htm, .html, .eml, .key, .numbers, .pages file types.

What document types do not allow full text searching?

The following files do not allow full-text searching but will allow title/file name searching: .xls, .xlsx, .ppt, .pptx, .tif, .tiff, .bmp, .jpe, .jpg, .jpeg, .gif, .png, .jfx, .wma, .wmv, .avi, .wav, .mov, .mpg, .mp2, .mp3, .mp4, .mp4a, .zip.

What document file types are viewable in firm central?

The following document types are viewable within Firm Central: .doc, .docx, .wp, .wpd, .pdf, .txt, .rtf, .msg, .htm, .html, and .eml.

Other file types that may be uploaded to Firm Central must be viewed in their native applications: .xls, .xlsx, .ppt, .pptx, .tif, .tiff, .bmp, .jpe, .jpg, .jpeg, .gif, .png, .jfx, .wma, .wmv, .avi, .wav, .mov, .mpg, .mp2, .mp3, .mp4, .mp4a, .zip.

What is the baseline amount of storage? Is it per user or per account?

Storage is shared by everyone within the firm. The amount of storage is determined by the number of users within the firm. All firms are given 10 GB of storage as a base amount and 2 GB storage for each user within the firm. For example, a 3 person law firm would be given a total of 16 GB of storage (10 GB base storage + 3 x 2 GB for each user). As noted, the total storage is shared by everyone within the firm.

Example: If a firm buys 30 seats – total of 70 GB – one user can upload all 70 GB.

How do i know when I am out of storage?

User uploaded documents including documents in the Recycle Bin count towards storage limits. The firm Administrator can set up an email notification to be alerted when a designated threshold of storage has been reached. An error message displays to individual users if s/he attempts to upload a document and the firm has exceeded its available storage space. The firm can purchase more storage or the Administrator can clean out unneeded documents. Additionally, administrators can see the amount of storage they are using by clicking on the administrator tab and users will be notified of remaining storage every time they upload a document from the web browser.

How many documents can you store in 10GB of storage?

10 GB = approximately 50,000 to 150,000 documents, but actual number of documents varies depending upon file types and sizes.

What types of files affect the storage?

Any user uploaded documents count against storage, including documents in the Recycle Bin. Contacts, Matters and Events are not counted against storage.

What is the default order for matters? Can they be re-sorted?

Initially the Matters tab will default to the All Matters sub-tab and will appear alphabetically by client name, in ascending order. All matters represent all matters throughout the firm, excluding any matters for which you have been denied access. You may switch to the My Matters sub-tab, displaying only matters for which you are a member of the Matter Team, in alphabetical order by client name ascending. Both All Matters and My Matters sub-tabs may be re-sorted by matter name and Open Date, ascending and descending order for each.

What is the default order for documents? Can they be re-sorted?

Documents on the Documents tab are organised alphabetically by client, and then alphabetically by Matters for the client. Within a Matter, documents are defaulted to the most recently added documents appearing first. Documents can be re-sorted by type, by title, and by date added, in ascending and descending order for each option.

Can a user add a new matter without first creating a contact?

A client is required to save a newly created matter. However, a user can create a New Matter without first creating a Contact or Client separately. The New Matter form includes a brief series of steps to add a new Client while creating the Matter.

Is there a way to know if someone else is editing a document I'm editing?

No. However, simple document versioning will allow the system to accept the upload of both documents, so no changes should be lost. If a document with the same file name already exists on Firm Central, the user will be alerted to the duplicate upon upload and have the option to replace or rename the version the user is attempting to upload.

How can I add sent emails to the matter folder?

To add a sent item to a matter, simply drag it from your sent items file folder to your matter folder in Outlook.

Can I access my Firm Central data offline?

All data is stored in Thomson Reuters' data centres. In order to access data offline a user should store a back-up copy of documents required offline to their PC.

Does the mobile site work on Android devices?

Firm Central is accessible from many devices that have an internet connection and browser. A list of supported browsers is available within the product in the Help file located in the site footer.

Can I get my data out if I end my subscription? How does that work?

You can remove your data from our systems at any time. Even if you stopped paying your bill we will continue to store your data for 180 days after you lapse your account. We will never prevent you from removing your data under any circumstances. We provide tools to export your data at any time.

How do I add gmail/Mac emails to matter folders?

First, save the email to your PC / Mac desktop, from there it can be uploaded using the document upload feature.

When I import an email, does the attachment come with it? Is it searchable?

Yes and yes. If the email contains multiple nested levels of attachments, only the first level of attachments comes with the original. Attachments are searchable if the format of the attachment is one of the supported/indexed file types.

Does Firm Central integrate with Outlook on a Mac?

No. The Firm Central desktop plug-in is only available for Outlook on a PC.

I am a Mac user- can I drag and drop files from Desktop to Firm Central?

YES. Best results using Google Chrome as a browser- users may see some limitations with moving full file tree structure with other browsers.

As a Mac user, can I save files to Firm Central using desktop plugin?

NO. Mac users cannot save a file directly to Firm Central on a Mac, they must either upload the saved document or drag and drop into Firm Central. Users can run Windows on their Mac computers using software like Parallels. However, TR does not actively support use of the desktop utility in this manner.

Is Outlook Calendar installed on my Mac compatible with Firm Central calendar?

NO. Users cannot add the Firm Central calendar as a link within the installed version of Outlook for Mac.

Will Mac calendar integrate with Firm Central calendar?

YES. One way sync is available using .ics calendar link.

Is Office 365 (Online) on Mac compatible with Firm Central?

MOSTLY YES. In this case, the Firm Central calendar link can be added to the online version of Exchange for Office 365. This requires a subscription to Office 365 Online. If users have an Office 365 *online only* subscription, they must save the document locally and then upload or drag and drop.

Does Firm Central offer any options for managing time and billing?

Yes and yes. Time & Billing module enables users to log and track time and expenses to matters, generate pre-bills and invoices and log payments.

Can pre-bills be edited?

Yes. User can add new time and expense entries to an existing pre-bill; in addition, user name or date on specific time and expense entries on the pre-bill can be changed.

Can I reverse an invoice?

Yes. User can reverse invoices in Firm Central (with the exception of contingency fee type); all previous transactions need to be reversed first- as a result, the invoice returns to a pre-bill stage.

Pricing

How is price calculated?

Pricing is based on the total number of fee earners within a firm (we define fee earners as all partners, associates, paralegals and trainees). This ranges from £75 per person per month for a sole practitioner down to under £65 per person per month for a firm of 30 fee earners. The standard discount policies will apply. A full pricing matrix will be uploaded to the hub in time for the initial launch.

Security

How secure are my client matters?

Firm Central includes data-hosting services that assure the safety, confidentiality, and accessibility of your firm's information and meet legal-industry data standards. Client data is stored in secure Thomson Reuters' UK data centre that is ISO27001 certified. For more detail on this, please refer to the UK-specific Hosted Security flyer.

Support

UK customer support

Thomson Reuters Technical Support provides professional, consultative assistance for any technical issues you may have when using Firm Central.

Weekdays: 9am to 5pm.

The support line is closed at weekends and on UK public holidays.

Call: 0345 600 9355

Email: customersupport.firmcentral@thomsonreuters.com

