

Firm Central – Mass Update Admin

Please follow the below steps to mass update Admin access on all matters in Firm Central. This MUST be completed prior to data extraction.

1. Sign into Firm Central as the Admin.
2. Selects Firm User Management from left hand navigation.
3. Select User Matter Access from top navigation.
4. Select the individual User from the "Firm User" drop down menu.
5. From the "Set As" drop down menu, you will need to select "Owner".
6. Under Matter Team, make sure INCLUDE is selected and the icon is green.
7. Under "Select Matters" click on the drop-down menu and select the option for "All Matters".
8. Check the box to select "All Matters".
9. The Matters will appear on the "Selected Matters" display on the right.
10. Once the save button becomes active, select save.

The screenshot displays the 'Administration' page in Firm Central, specifically the 'User Matter Access' configuration screen. The interface includes a left-hand navigation menu, a top navigation bar, and a main content area with various configuration options. Red boxes and numbers 1 through 10 are overlaid on the interface to indicate the steps for mass updating Admin access.

1. Administration menu

2. Firm User Management (left navigation)

3. User Matter Access (top navigation)

4. Firm User dropdown menu

5. Set As dropdown menu

6. Include radio button (Matter Team)

7. Open Matters dropdown menu

8. Select all 2204 checkbox

9. Selected Matters panel

10. Save button