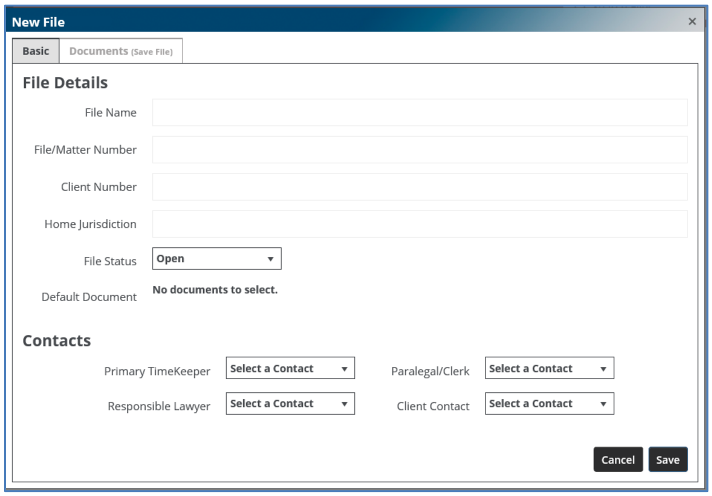
Creating and Editing Files

To create a NEW file:

1. Select the practice area (the following example uses Corporate Records)
2. Click **+Add File**
3. The **New File** form will appear:

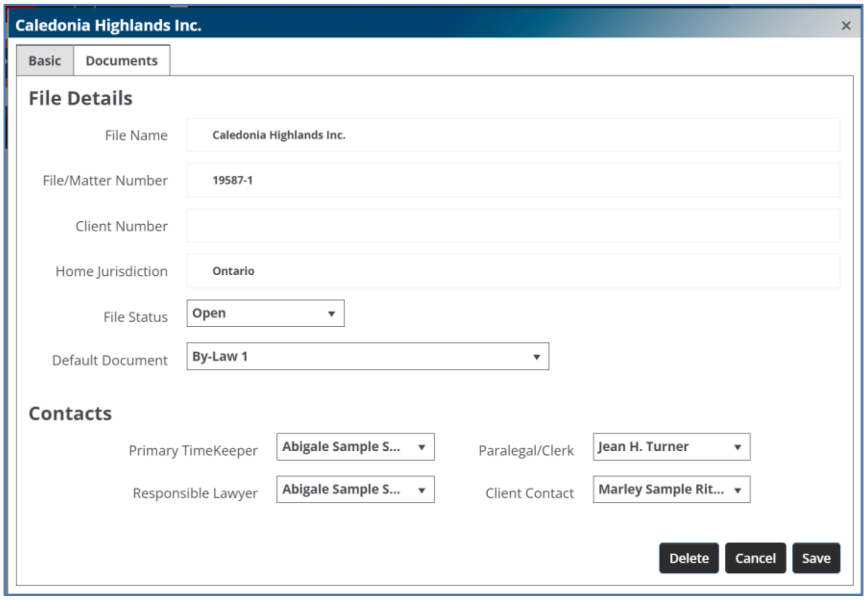


Basic Tab

The **Basic** tab is active – the Documents tab is initially greyed out since documents cannot be added until the file has been created.

Note: The *only* required fields are File Name and File Number

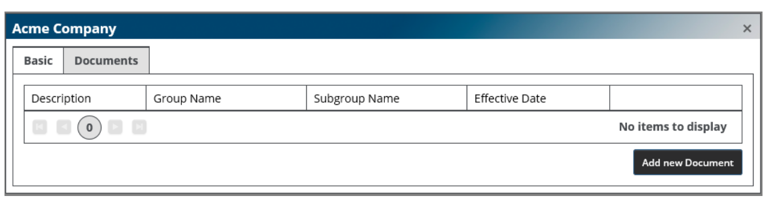
File Name	Text field
File/Matter Number	Text field
Client Number	Text field
File Status	Dropdown with two options – Open or Closed. Open files can be viewed by any User (assuming required access rights). Closed files can only be viewed by Internal Users (Law Firm Employee)
Home Jurisdiction	Text field
Primary Timekeeper	Select an existing Contact or create one
Responsible Lawyer	Select an existing Contact or create one
Paralegal/Clerk	Select an existing Contact or create one
Client Contact	Select an existing Contact or create one



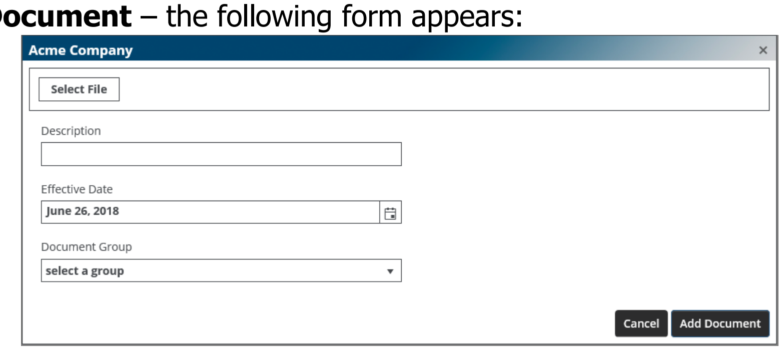
Click **Save** to create the file. If you decide you do not wish to create this file, click **Cancel**.

Documents Tab

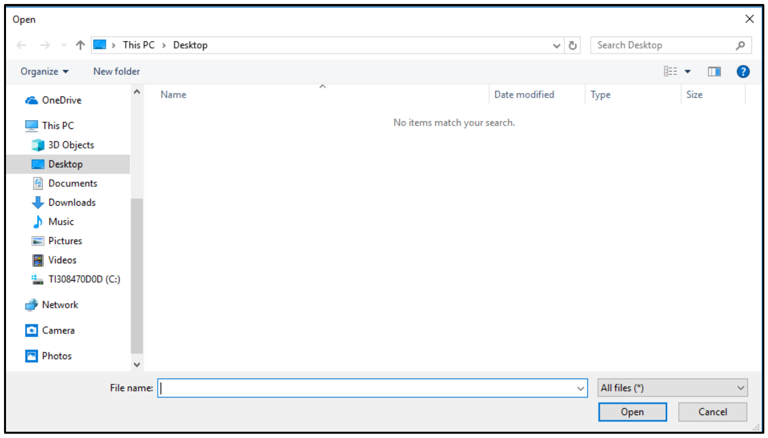
The Documents tab opens directly after saving the newly created file. You can now add documents to the file.



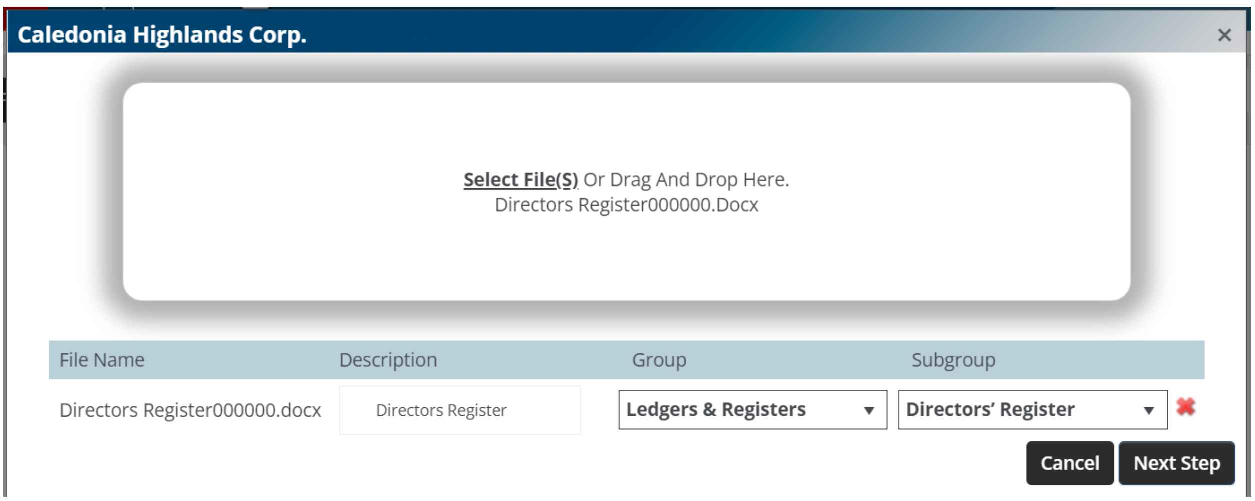
1. Click **Add new Document** – the following form appears:



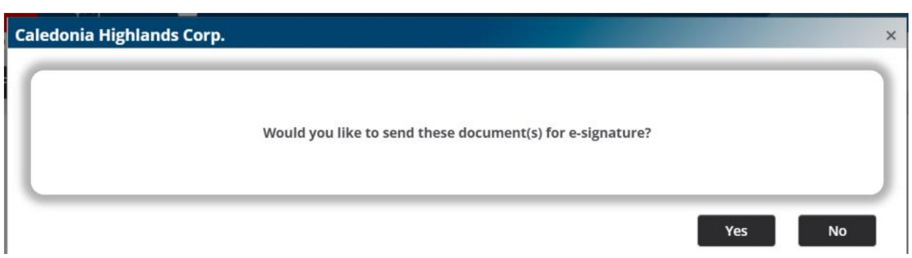
2. Click **Select File**



3. Navigate to the location of the document you wish to add. Select the document(s) and double-click to select or click **Open**.



4. Now enter the **Description**, and select the **Group** and **Subgroup** using the dropdowns. These are required fields and if one is not entered, the document will not be saved to the file and not appear as a link in the Table of Contents.
5. Click **Next Step** to add the document to the file.
6. Click **No** to add the document to the Minute Book with no further steps necessary.



7. The document will now appear in the Table of Contents and can be viewed. Click **Cancel** if you decide not to.
8. Click **Yes** if the documents are to be sent for signature using DocuSign.

Deleting a File

If this file is no longer needed in Legal Kiosk, click **Delete** and the file, together with all uploaded documents, will be deleted from Legal Kiosk