

**LEGAL** ANYWHERE  
*connect with your clients*

## **Upload Tool 7**

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***Installation, Configuration & User Guide***

## **Legal Anywhere Upload Tool 7 Installation & User Guide**

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# About the Legal Anywhere Upload Tool

## Overview

The Legal Anywhere Upload Tool can facilitate the addition of files and folders to the extranet. It can also facilitate the addition of files from your Document Management System (DMS) to the extranet. Bulk Uploads of files and folders and the addition of large files to your extranet are simplified with the Upload Tool.

## Installation Requirement

- Legal Anywhere Connection Manager  
(included in the installation package if not already installed)

# 1

# Installation & Configuration

**Overview:**

This chapter covers the installation and configuration of the Legal Anywhere Upload Tool 7.x. If you are currently running an older version of the Extranet Upload Utility, you must first uninstall the Extranet Upload Utility prior to installing the Upload Tool.

## Installation & Configuration

### Install the Upload Tool

If you currently have the Extranet Upload Utility installed, you will need to uninstall it prior to installing the new Upload Tool. The installation process is very simple.

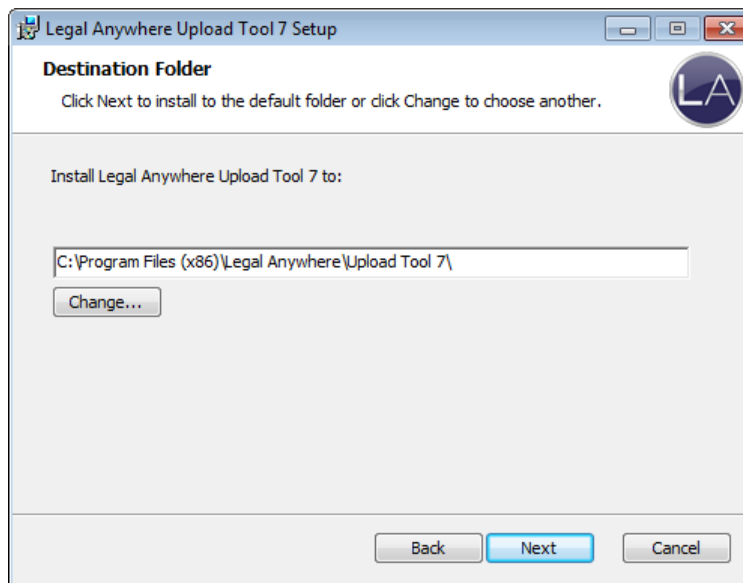
- 1 Uninstall the Extranet Upload Utility, if it is currently installed.
- 2 Double-click on the **Upload Tool 7.x.msi** file to launch the Setup Wizard.



- 3 Click the **Next** button on the Welcome screen for the Setup Wizard.

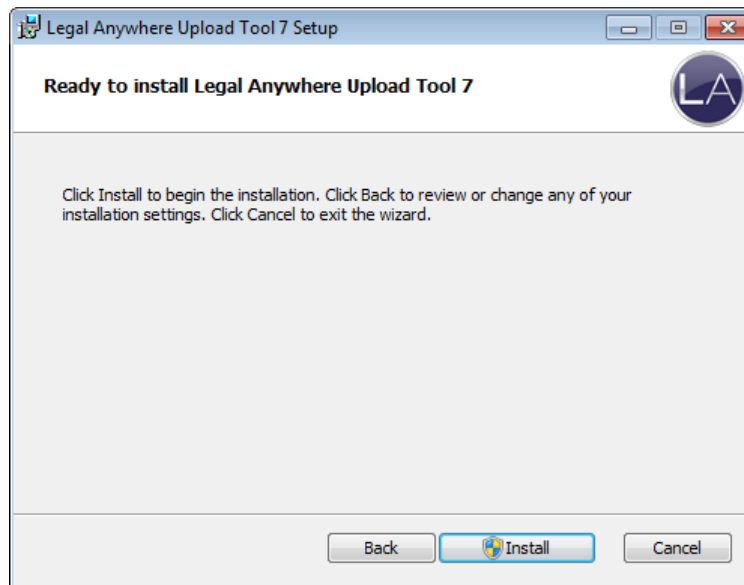


- 4 Click the **Next** button to accept the Destination Folder for the Upload Tool application.

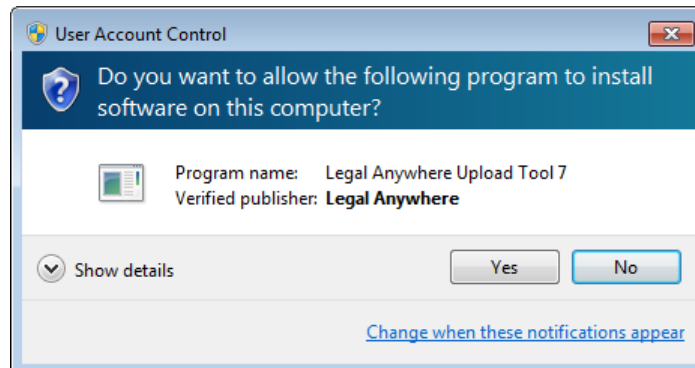


## Installation & Configuration

- 5 Click the **Install** button to start the installation.

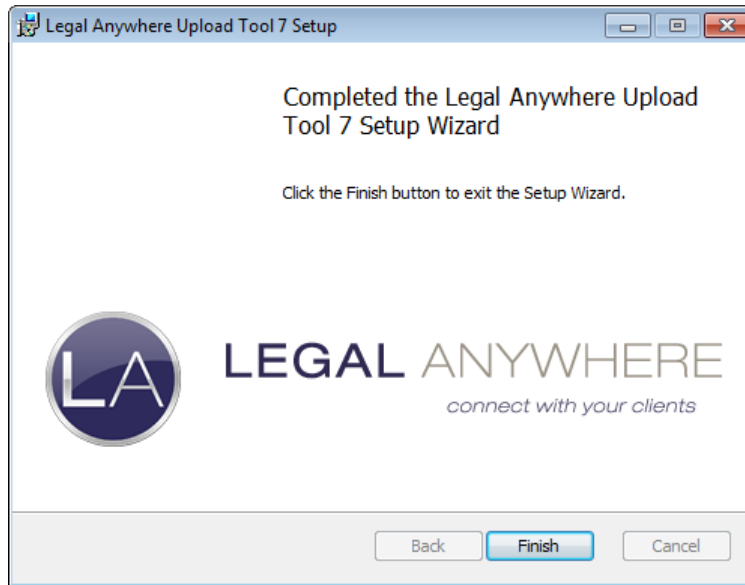


**NOTE:** Click the **Yes** button if you receive the **User Account Control** popup window in Windows 7.



## Installation & Configuration

- 6 Click the **Finish** button when you receive the **Completed** screen.



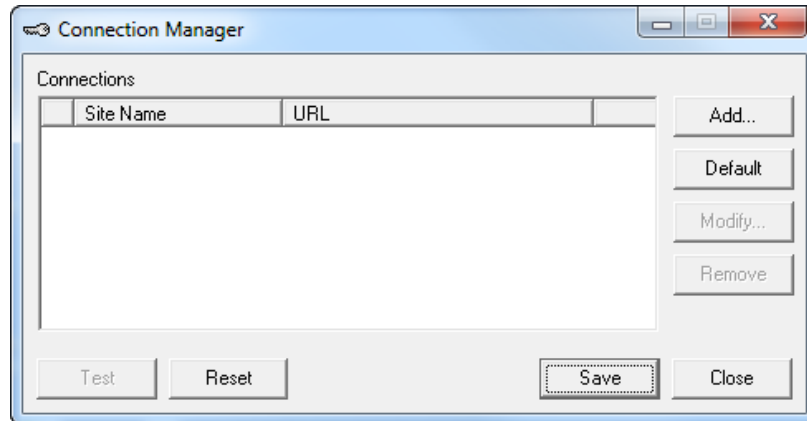


## Installation & Configuration

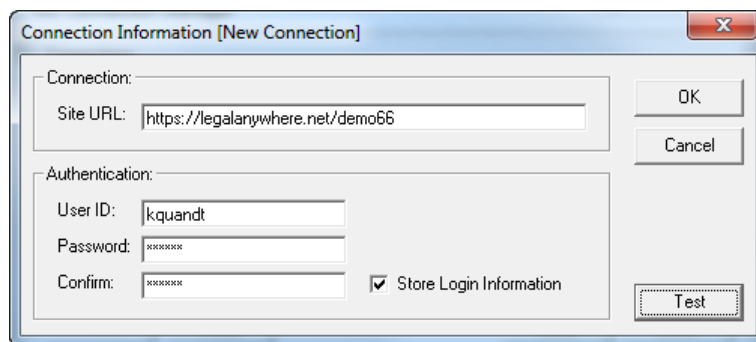
### Configure the Connection Manager

Once the Upload Tool has been installed, you must first configure the Connection Manager. The Connection Manager sets up the Extranet path and login credentials for your uploads.

**NOTE:** If the Connection Manager has already been set up for use with another Client Pack Tool, these steps are not necessary.

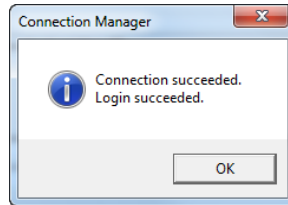


- 1 Navigate to **Start > All Programs > Legal Anywhere** and select the **Connection Manager**  
**NOTE:** If the **Connection Manager** was previously installed with a different Client Pack Tool, it may be located in the following path: **Start > All Programs > Extranet Client Pack**. The Upload Tool can use the file from either location.
- 2 Click the **Add...** button to create a new Connection.
- 3 Enter the URL for your Extranet Site into the Site URL box. Do not include the /default.asp to the URL. (e.g. [https://legalanywhere.net/\[firm\]](https://legalanywhere.net/[firm]))
- 4 Enter your User ID for your Extranet Site.
- 5 Enter your Password for your Extranet Site.
- 6 Re-enter your Password to confirm.
- 7 Check the Store Login Information checkbox, if it is not against your Firm policy to store credentials on your computer.

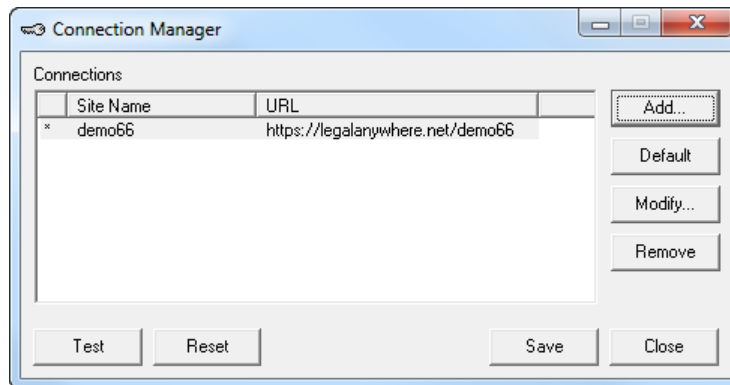


## Installation & Configuration

- 8 Click the **Test** button to ensure that your Site URL and login credentials are valid.



- 9 Click the **OK** button to close the popup.
- 10 Click the **OK** button to complete creation of the new connection.

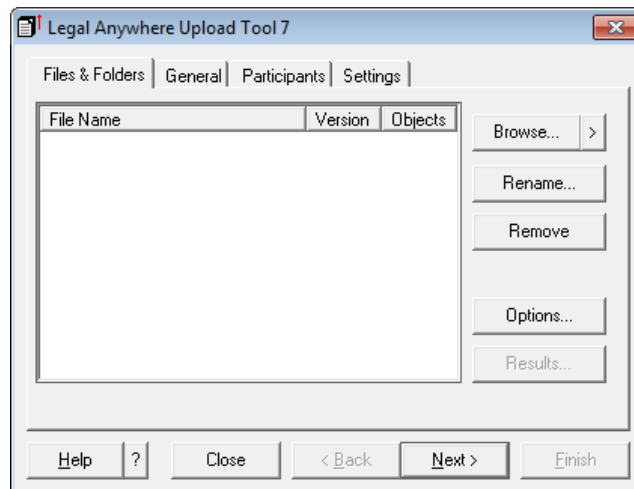


- 11 Click the **Save** button to save your settings.
- 12 Click the **OK** button in the confirmation popup.
- 13 Click the **Close** button to complete the configuration.

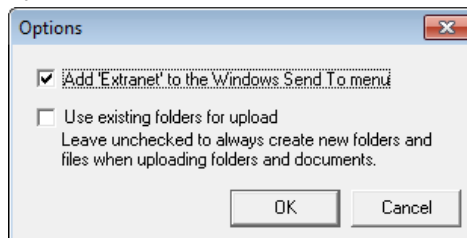
### Setting Upload Tool Options

Setting the Upload Tool Options allows you to have the Extranet be an option in your Windows Send To menu, and determine whether you wish to use existing extranet folders during your uploads or have the ability to create new folders on the extranet.

- 1 Launch the Upload Tool (**Start > All Programs > Legal Anywhere > Upload Tool > Upload Tool**).
- 2 Click the **Options...** button.



- 3 Check the box **Add "Extranet" to the Window Send To menu** if you would like to have the ability to right click on files or folders in your Windows environment to send them to the Extranet using the Upload Tool.
- 4 Check the box **Use existing folders for upload** if you wish to use only existing Extranet folders for your uploaded content. If you leave this box unchecked, the tool will automatically create new folders where necessary.



**NOTE:** If you are updating an existing version of the Upload Tool (with the previous AMS Legal branding), you will need to de-select the **Add 'Extranet' to the Windows Send To menu** option, and then re-select it in order for it to work properly.

- 5 Click the **OK** button to save your selected **Options**.
- 6 Click the **Close** button to close the application, or follow the steps in Chapter 2 for uploading files and folders.

# 2

# Upload Files & Folders

**Overview:**

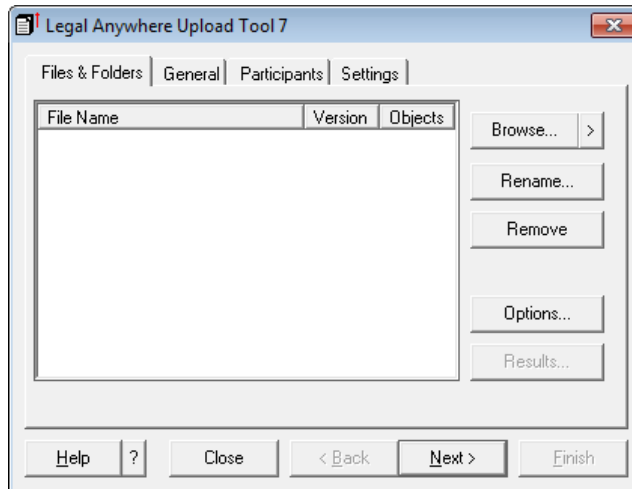
The Upload Tool allows you to upload individual and multiple files, or even folders full of files. The Folder uploads include creation of the folders within the Matter. You can upload individual files up to 2 GB in size. The Utility provides a status of the upload as it progresses as well as a Log with the final results of the process for review.

## Upload Files & Folders


### Files & Folders Tab

The Files & Folders tab is used for the selection of the file(s) and folder(s) to be uploaded.

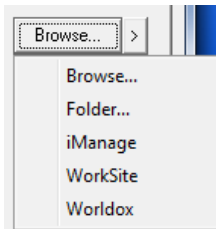
- 1 Navigate to **Start > All Programs > Legal Anywhere > Upload Tool**, and select **Upload Tool**.



- 2 Click the **Browse...** button to select a file or files to be uploaded;  
**OR**

Click the chevron button (  ) to the right of Browse for other options such as **Folder...** to select Folders to upload, or your document management system (DMS) to select files to be uploaded from the DMS;

**NOTE:** You can only upload files from your DMS, not folders.



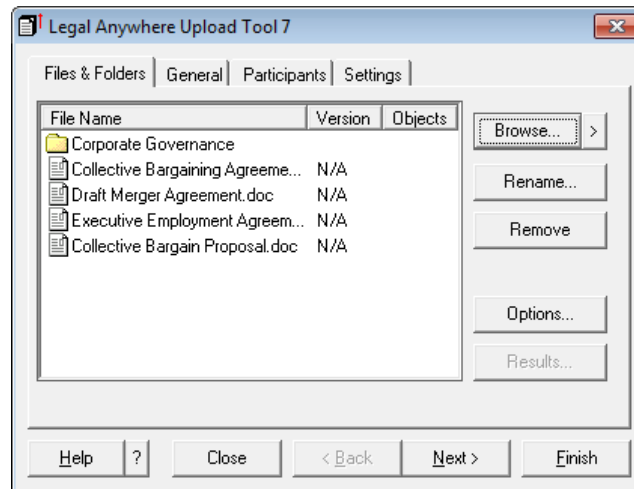
**OR**

You can drag and drop files and/or folders from a Windows location into the Files & Folder area of the Upload Tool.

**NOTE:** You cannot drag and drop files from a CD or DVD into the Upload Tool. These files can, however, be added using the **Browse...** button.

## Upload Files & Folders

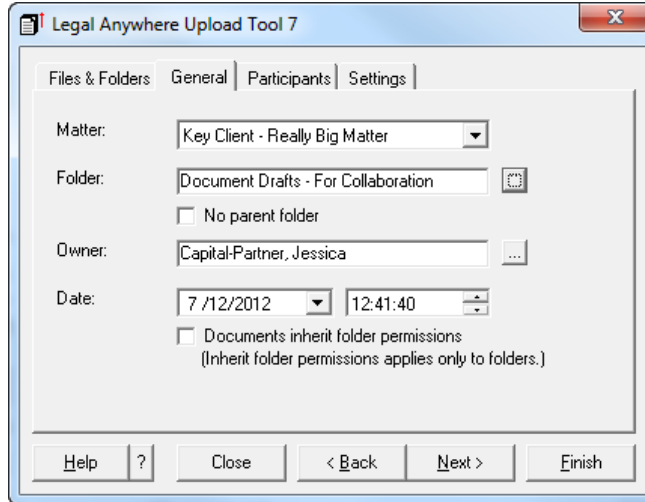
- 3 Select the file(s) and/or folder(s) to be uploaded to the Extranet.
- 4 Select a file or folder and click the **Rename** button to rename any files or folders in the list box.
- 5 Select a file or folder and click the **Remove** button to remove any files or folders that you do not wish to upload.
- 6 Click the **Next** button to move to the **General** tab.



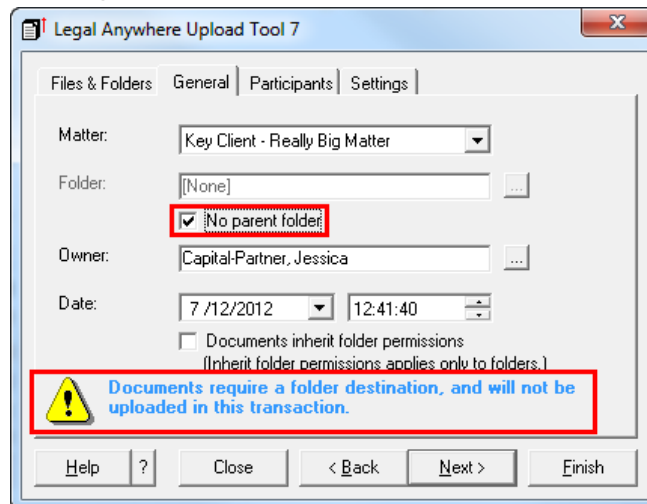
## Upload Files & Folders

### General Tab

The General tab is used for selecting the location the file(s) and/or folder(s) will be placed on the Extranet, the Owner of the items, the Created Date/Time to be set for the items, and whether or not Documents inherit folder permissions will be set to Yes for any Folder(s) in the upload.



- 1 Select the **Matter** to which you wish to add the file(s) or folder(s) from the **Matter** dropdown list.
- 2 Click the elipsis button (...) to select the **Folder** to which you wish to add the file(s) or folder(s).
- 3 Check the **No parent folder** checkbox if you are uploading only folders and wish them to become top level folders on the extranet.



**NOTE:** Any files not contained within a folder on the Files & Folders tab will not be uploaded, if you select **No parent folder**.

- 4 Change the **Owner**, if desired, or allowed by permissions.
- 5 Modify the date and time of the upload, if necessary.

**NOTE:** Best practice is to leave the current date and time as defaulted.

## Upload Files & Folders

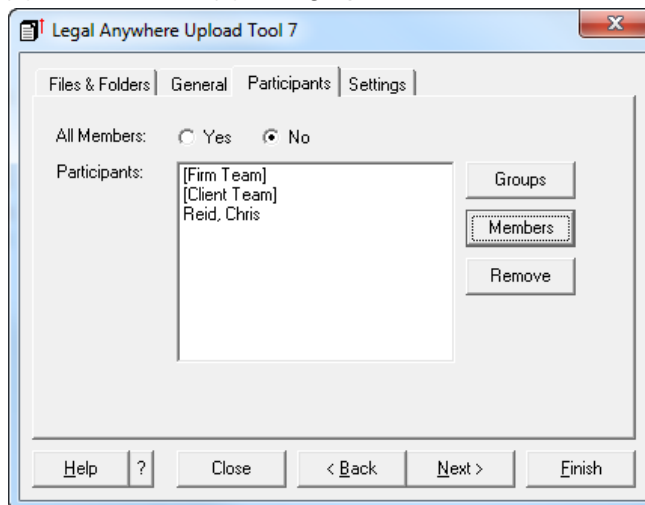
- 6 Check the **Documents inherit folder permissions** checkbox if you are uploading one or more folders and wish the documents within the folders to inherit the permissions.
- 7 Click the **Next** button to move to the **Participants** or **Settings** tab.  
**NOTE:** The **Participants** tab will not appear if the folder you are hooking onto (or the last folder selected) was set to **Yes** for the **All Members** field.



## Upload Files & Folders

### Participants Tab

The Participants tab is used for identifying the Members and/or Groups who will have access to the file(s) and/or folder(s) being uploaded.



- 1 Select **No** for **All Members**, if you wish to set permissions by Members or Groups.
- 2 Click the **Members** button to select individual Members who will be able to access the file(s) or folder(s).
- 3 Click the **Groups** button to select the Group or Groups that will be able to access the file(s) or folder(s).
- 4 Click the **Remove** button to remove any selected Groups or individual Members from the Participants list.

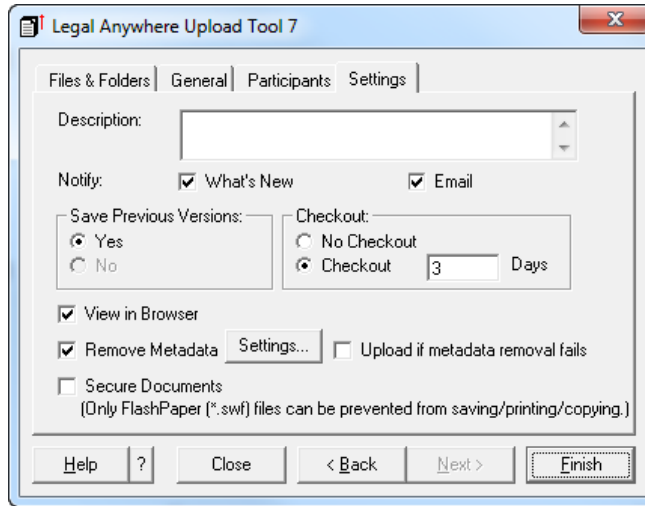
**NOTE:** The permissions selected here will apply to *all* listed Files and Folders in this upload session.

**NOTE:** With **All Members** set to **Yes**, all of the Members who have access to the destination Folder will also have access to these file(s) and/or folder(s).

## Upload Files & Folders

### Settings Tab

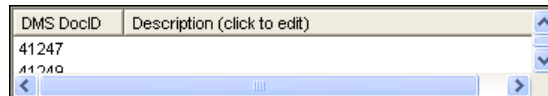
The Settings tab is used to select file-level options.



- 1 Enter a **Description** for the file(s) or folder(s), if desired.

**NOTES:** Any Description entered when pulling files from your local or network drives, or your document management system will apply to every file and folder in this upload batch.

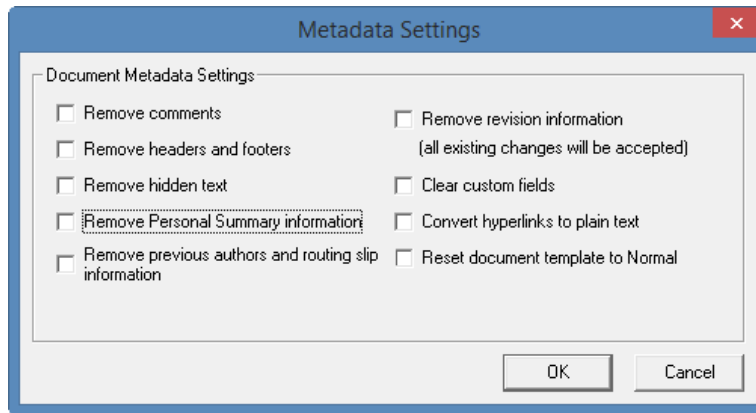
When using the *Send to Extranet/Client Portal* functionality from a Document Management System, you can modify the description of each file individually, by clicking on the line by the DMS DocID, and typing the Description into the popup dialog.



- 2 Select or deselect the appropriate Notification options – **What's New** and/or **Email**, if allowed by permissions.
- 3 Change the **Save Previous Versions** setting, if desired, or allowed by permissions.
- 4 Change the **Check Out** settings options for the file(s) being uploaded, if necessary, or allowed by permissions.
- 5 Select or de-select **View in Browser** as appropriate.
- 6 Select or deselect **Remove Metadata** as appropriate.

## Upload Files & Folders

- 7 Click the **Settings** button to view or change the Metadata options.

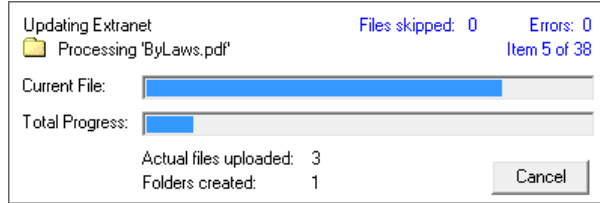


Metadata Settings	
<b>Remove comments</b>	This option will remove any comments that were added to the document.
<b>Remove headers and footers</b>	This option will remove any headers or footers that exist in the document.
<b>Remove hidden text</b>	This option will remove any text that is formatted as "hidden".
<b>Remove Personal Summary information</b>	This option will remove any personal information from the uploaded files (e.g. Title, Author, Company, etc.).
<b>Remove previous authors and routing slip info</b>	This option will remove the names and routing slip information for any previous authors of the document.
<b>Remove revision information (all existing changes will be accepted)</b>	This option will remove any revision information (Track Changes). Not that all existing changes will be accepted.
<b>Clear custom fields</b>	This option will clear the contents of any custom document fields.
<b>Convert hyperlinks to plain text</b>	This option will convert active hyperlinks into plain text.
<b>Reset document template to Normal.dot / Normal.dotx.</b>	This option will change the existing document template to "Normal.dot" or "Normal.dotx" depending on the version of Word installed on the Client computer.

- 8 Select or de-select **Secure Documents** as appropriate.  
9 Click the **Finish** button to upload your file(s) and/or folder(s).

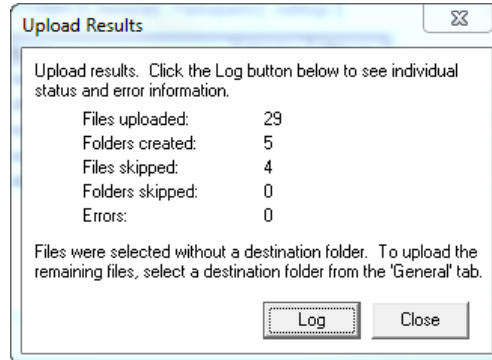
An Upload Progress window will appear during the upload of your file(s) and folder(s).

## Upload Files & Folders

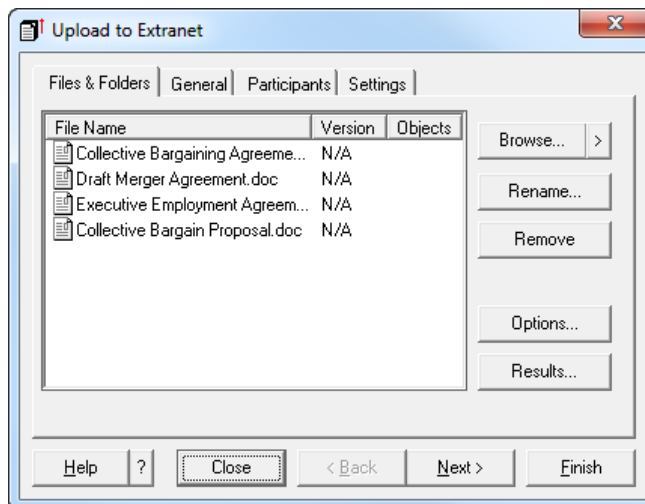


- 10 Click the **Log** button to view the Log results of your upload process; or click the **Close** button.

**NOTE:** Any files that may not have been uploaded will still be listed on the **Files & Folders** tab, if they were not initially contained in a Folder that was uploaded.



- 11 You can click the **Results** button on the **Files & Folders** tab to access the Upload Tool Log at any time. The most recently run Upload process will be at the bottom of the log file, and any previous jobs run will appear above it.
- 12 If Files are skipped (because there is No Parent Folder), they will remain on the **Files & Folders** tab, after you close the Upload Results dialog.



- a. Return to the **General** tab to select a folder to place the files in, and
- b. Click the **Finish** button to complete your upload.

# 3

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