



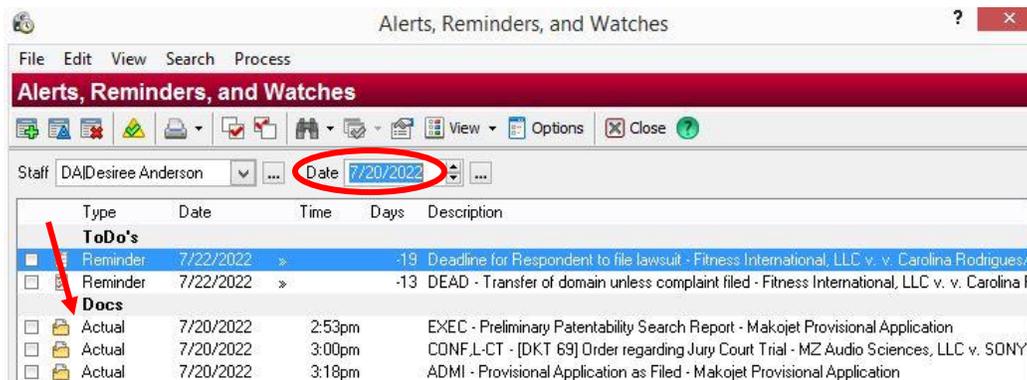
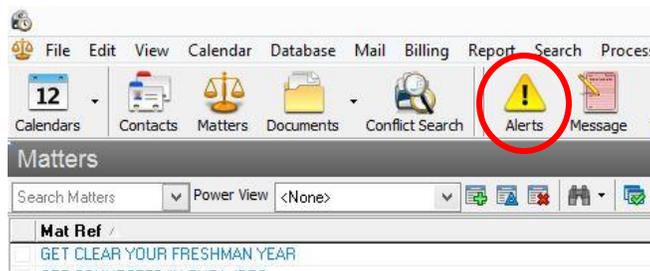
C&T Staff Training
July 27, 2022 (da/lb)

Saved Document to Wrong Matter – Changing Matters

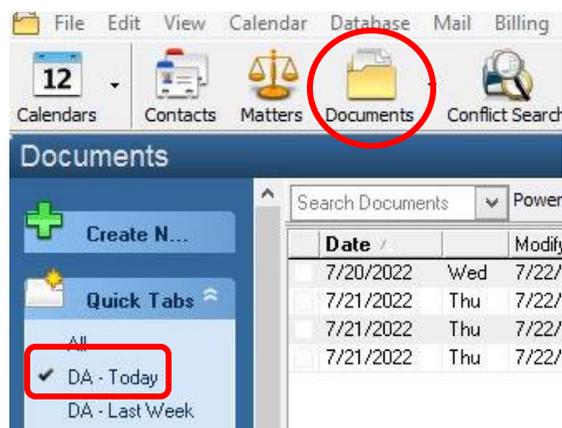
What if I have saved a document in the wrong place?

- If you do not know where you saved it, you can find it by...

(1) Going to the “Alerts” tab and look through the list of documents you created that day

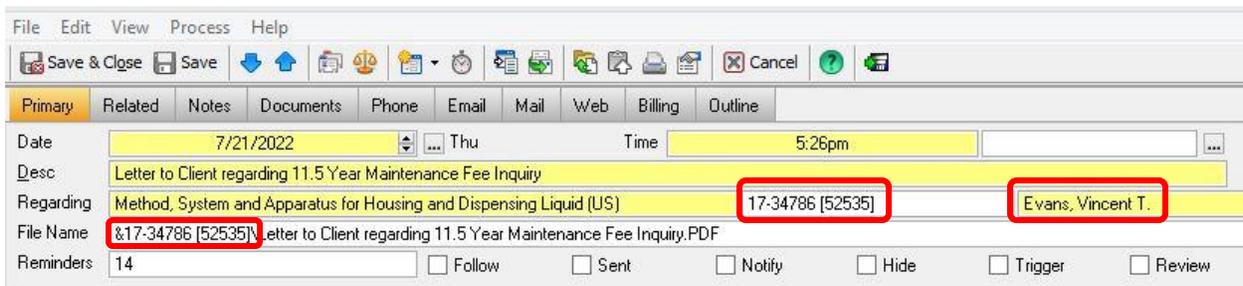


(2) Click on the “Documents” tab and select “[Initials] – Today”



If you know where you saved it, but it is in the wrong matter...

- (1) Go to the matter and open the “Document Form – Change” for that document
- (2) Delete the matter number and client contact
- (3) Add in the correct matter number and press the Tab key
- (4) Replace the matter number with the correct matter number in the “File Name” section
 - Be careful not to delete the “&” or “\”
- (5) Click “Save & Close”



- (6) Open the T-drive folder for the old matter number and the new matter (you will have two folders open)
- (7) Drag the document from the old matter folder into the correct T-drive folder
- (8) Go back to the document in Time Matters and double check the document linked up

Make sure to update the file path at the bottom of Word documents