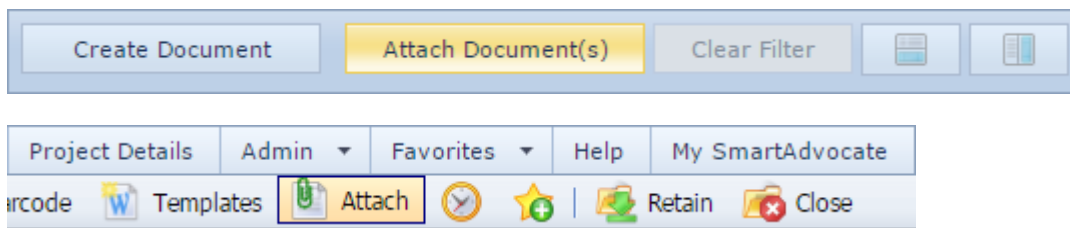


## Managing Documents in SmartAdvocate Cloud

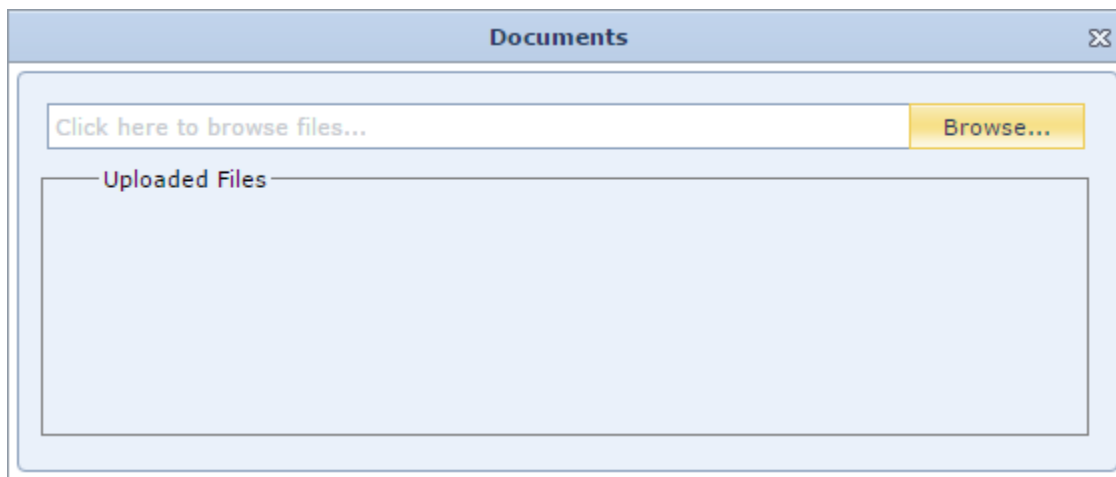
The process of adding, editing, or opening documents in the cloud version of SmartAdvocate is fairly simple: upload a new document to the cloud to add it, or upload an edited document to replace an older version; download a document to retrieve it from SmartAdvocate or to make changes.

### *Attaching New Documents*

To attach a document from your computer to a case file in SmartAdvocate, click the Attach Document button in the Documents page, or click the Attach button in the Case Quick Add Bar.



This will bring up a small panel; click the Browse button in the panel to browse your computer files for the document you wish to attach.



Once you have selected the file, the panel will expand to allow you to enter the details of the document (such as its category and description). Click Save once you have entered the information you wish to add, and the document will be uploaded to the cloud and saved in the case file.

Documents
✕

Click here to browse files...
Browse...

Uploaded Files

[AttachmentExample.docx](#)

Date:

Direction:  Incoming  Outgoing  Memo

Search Sub-Category:

Category:

Sub-Category:

From:  Our Firm

To:  Our Firm

Priority:  Critical  High  Normal  Low

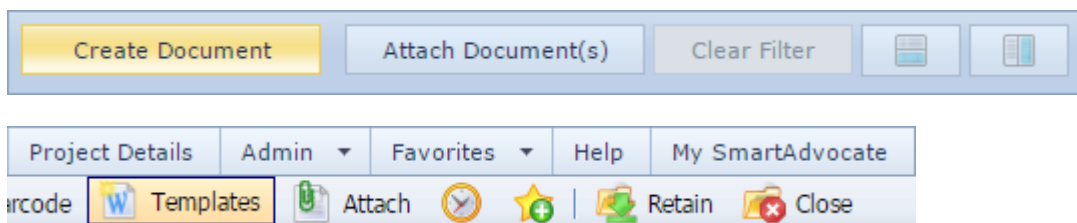
Analysis:

Reviewed

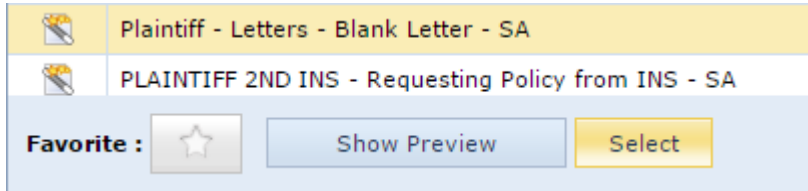
Description:

### *Generating New Documents*

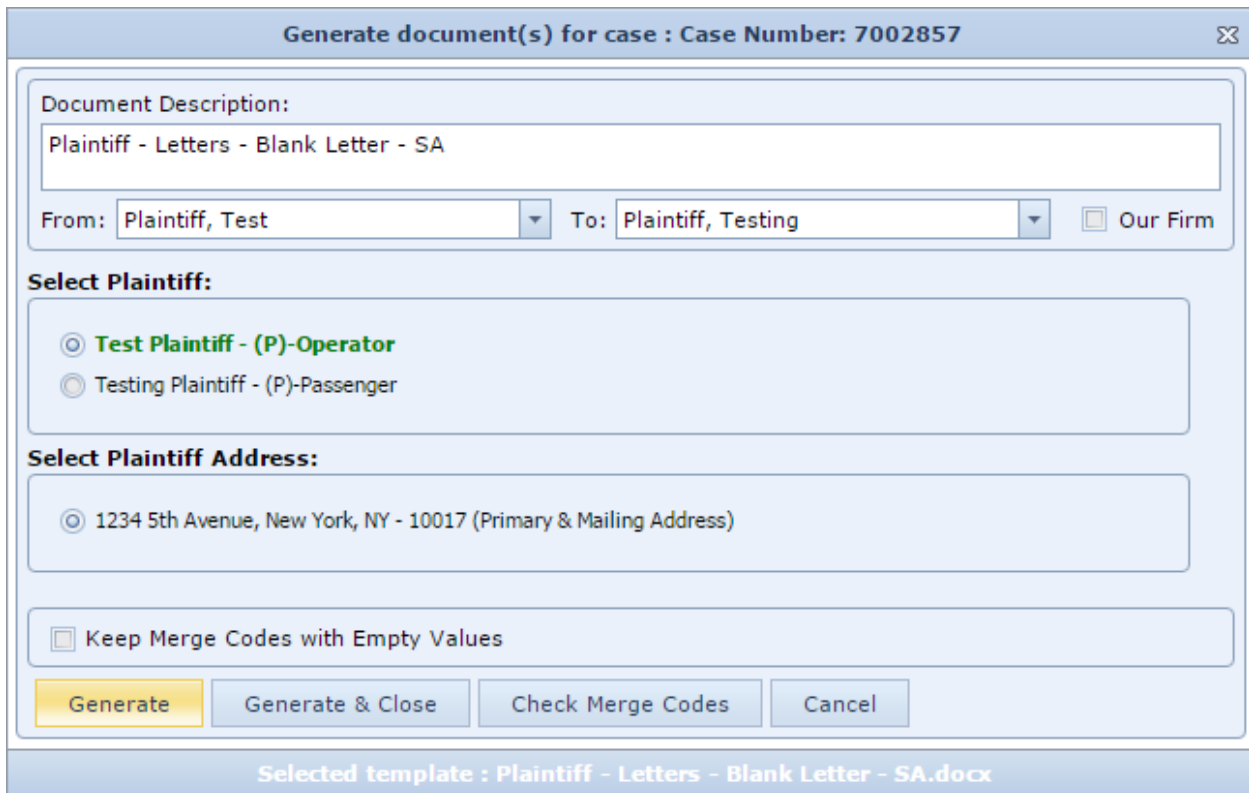
To generate a new document from a SmartAdvocate document template, click the Create Document button in the Documents page, or click the Templates button in the Case Quick Add Bar.



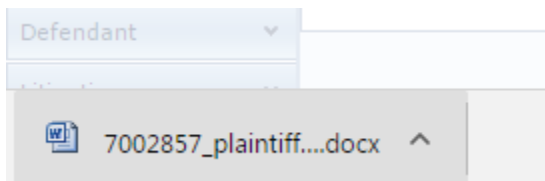
This will bring up a list of your available templates. Click the one you wish to use for the document generation and click the Select button below the list of templates.



This will bring up a panel that allows you to specify what data various merge codes will use (for example, if your template includes merge codes that use data about a plaintiff, you will need to specify which of the plaintiffs in the case the merge codes should refer to). Once you have made the necessary selections, click Generate or Generate & Close.

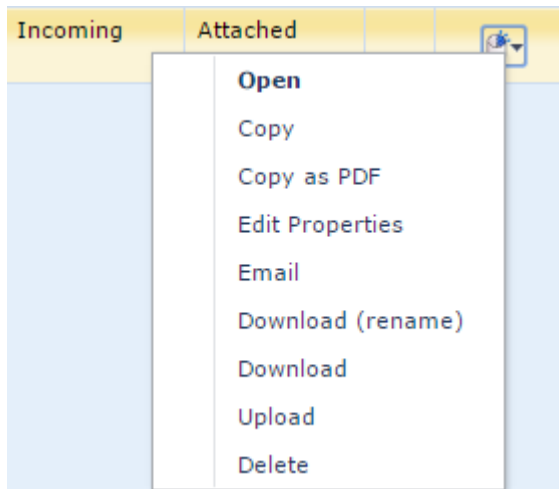


The document will be automatically generated by SmartAdvocate and will be automatically downloaded to your computer. There should be a download panel or bar in your browser that shows the newly created file; click it to open the downloaded document.

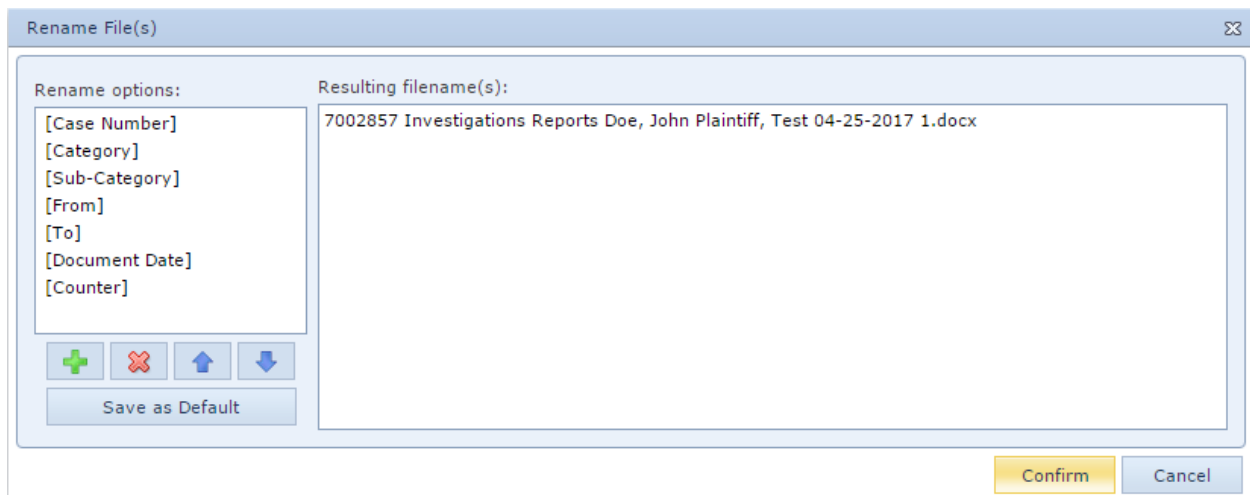


### *Opening Existing Documents*

To open a document that has been added to SmartAdvocate, find the row corresponding to that document in the table in the Documents page. (If there are many documents on the page, you can use the search fields at the top of each column to efficiently find the document you are looking for.) Once you have found the row, right-click the row or click the right-click icon in the Action column of the row. This will bring up a menu of available actions for the document.



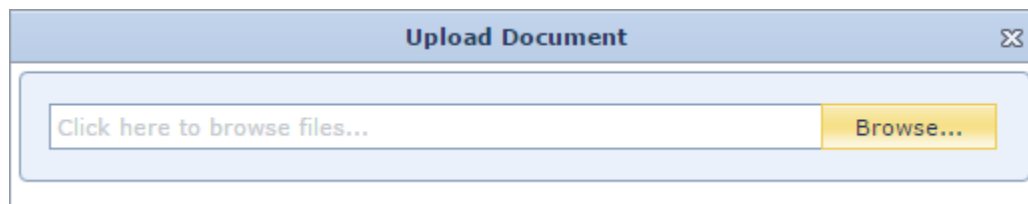
Click either Download or Download (rename). Clicking Download will immediately download the document to your computer. There should be a download panel or bar in your browser that shows the downloaded file; click it to open the downloaded document. Clicking Download (rename) will open a panel allowing you to change the file name of the document to make it easier to understand in your computer files. You can automatically add, remove, or reorder various elements of the file name, including the case number, document date, or custom text selected by you. Once you are satisfied with the new file name, click Confirm and the renamed file will be downloaded to your computer.



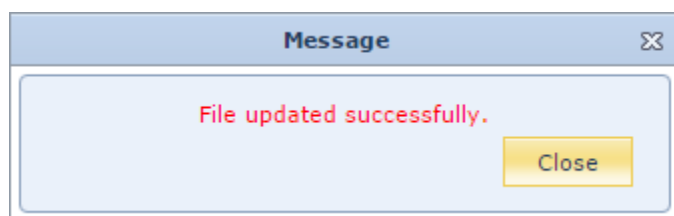
### ***Uploading Edited Documents***

If you have downloaded an existing document and made edits to it, there are two options for uploading the edited document back to SmartAdvocate. You can either attach it as if it were a

new document (see Attaching New Documents, above) or you can upload the edited document in the place of the original version. To replace an older version of a document with an edited version, find the row corresponding to the document in the table in the Documents page. Right-click the row or click the right-click icon in the Action column, then click Upload. Click the Browse button in the small panel that appears, then select the edited version of the document in your computer files.



The edited version will automatically be uploaded and will replace the older version of the document in the SmartAdvocate system.



Note that the listed properties of the document in SmartAdvocate will not be updated to reflect any changes. If you wish to change the properties of the document, such as the document date, right-click the row corresponding to the document and then click Edit Properties. This will open the panel containing the document properties, so you can make any necessary changes. Click Save when you are finished making changes.

Documents



Date: 04/27/2017 01:15 PM

Direction:  Incoming  Outgoing  Memo

Search Sub-Category: Investigations, Reports

Category: Investigations

Sub-Category: Reports

From:  Our Firm Doe, John

To:  Our Firm Plaintiff, Test

Priority:  Critical  High  Normal  Low

Analysis: Positive Plus

Reviewed

Description: An extremely exemplary example

Created at 04/25/2017 7:53PM by Unassigned, Staff

Save

Cancel