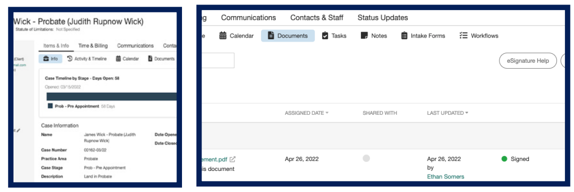
How to Upload to MyCase

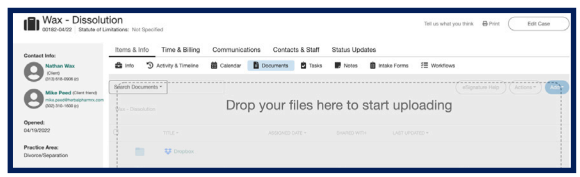
This is just a quick instructional guide on uploading files to MyCase. When we get emailed a file, or something comes in from discovery you will want to upload it into the client's case. From there you can organize it, track your time, and share it with the client. Follow the steps below to see how to keep that process ticking along! You can also watch this guide here: *joneslawcolorado.com/dashboard*

Steps to Follow

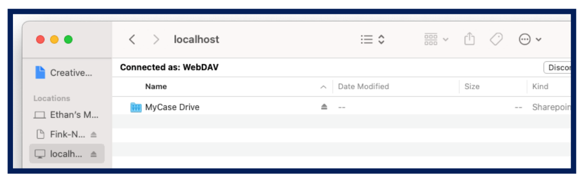
- Navigate to a client profile and click "Items and Info" and then "Documents".



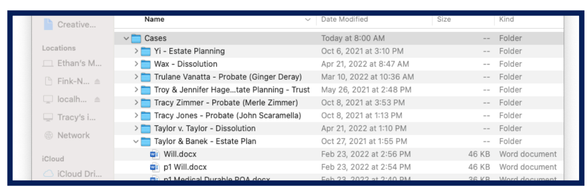
- Grab the file and drag it into the documents area where an upload symbol will appear.



- OR using the new local file organizer go to MyCase in the file browser and click into the case.



- Once you've located the case file drop the file you want to upload in and it will appear in the case!



- That's that! Good job!

Concluding Thoughts

Now that MyCase Drive has been installed on all our computers it's the quickest and easiest way to move files in and out of MyCase. You will still need to use the web based version of MyCase to share documents with clients, but you can open and edit things now directly from your file browser!!