

CLNG Matter Attachment Options

This section includes **Importing, Emailing, and Organizing** files along with other options available in the **Attachments** view of a matter.

All 'matter' attachments are managed in the matter **Attachments** view which can be accessed by clicking on the **Paper Clip** icon in the **Module Tool Bar** while that matter is open. Any type of allowable file can be imported into a matter in CLNG, and almost all file types are allowable.

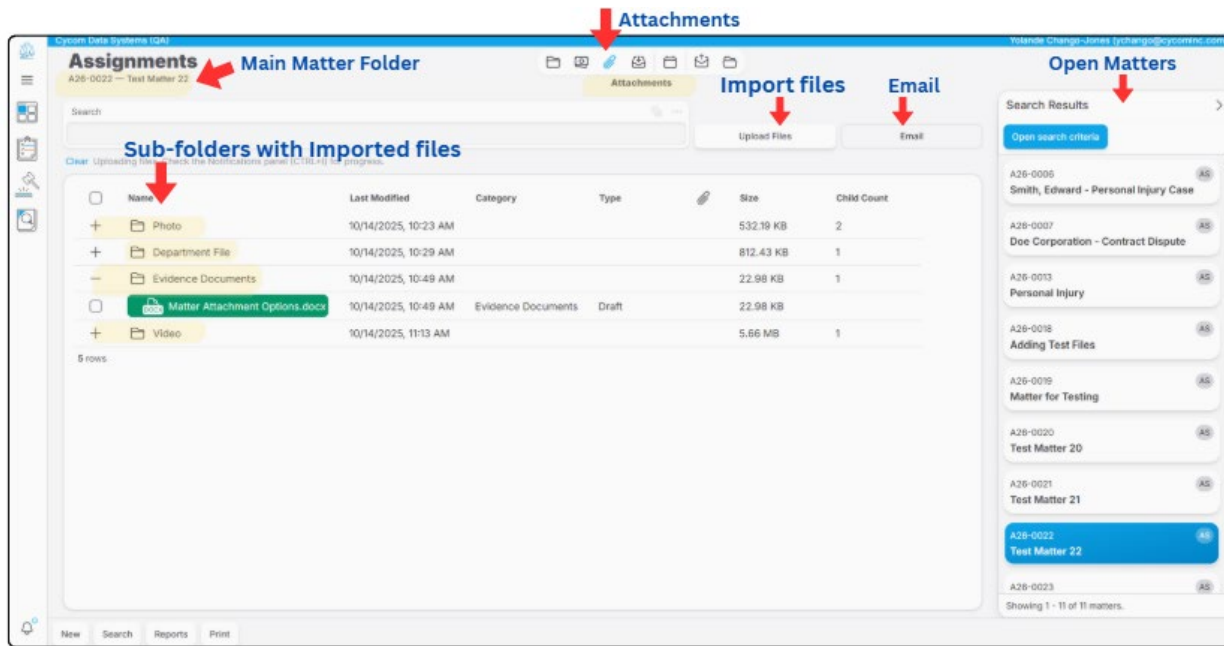
- Document and Text: **DOC, PDF, RTF, TXT**
- Image Files: **JPEG, PNG, BMP**
- Audio Files: **WAV, MP3**
- Video Files: **MP4, AVI, MOV**
- Email Files: **MSG**

File extension **.EXE** cannot be imported.

Contents For Attachments:

- [General Layout & Organization](#)
- [Importing Files](#)
- [Emailing Files](#)
- [Editing Files](#)
- [Searching Files](#)
- [Exiting the Attachments View](#)

General Layout & Organization



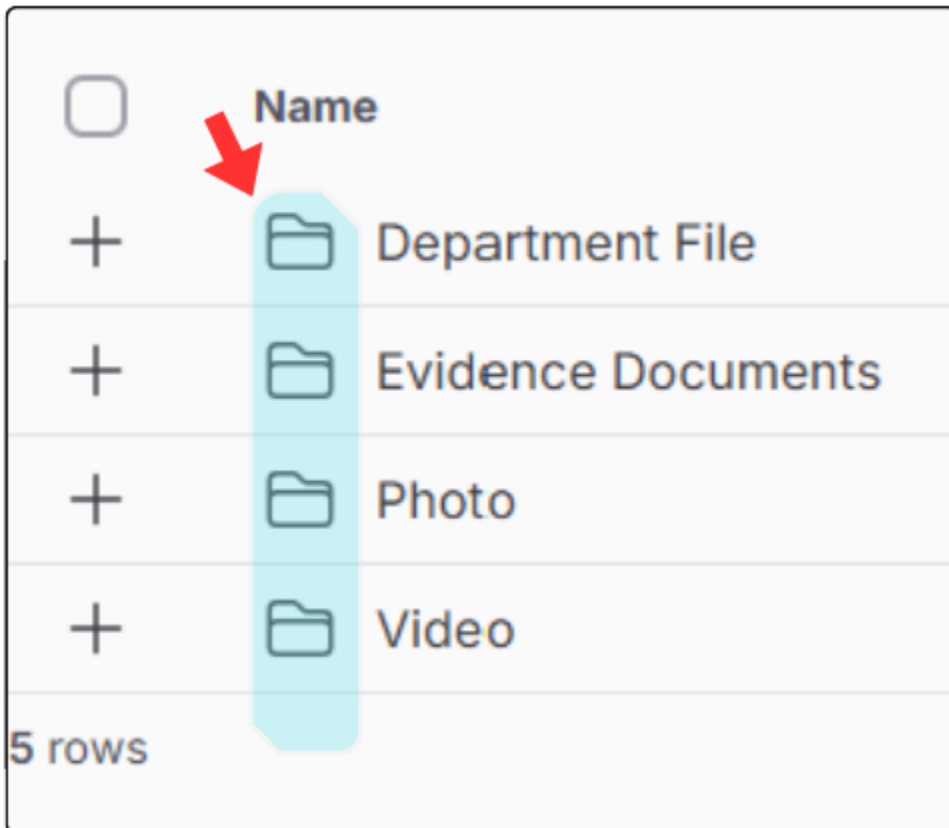
Files for a matter can be viewed in the **folder view**. It shows a **tree or hierarchy of nested folders** on the left panel. To the right is the display of the **current selected folder's contents**. At the top of the tree, there will always be the **main folder of the matter itself**; this is labeled with the **file number of the selected matter**. Any file that is attached to a matter will go into this folder by default unless another folder is specified.





This top folder cannot be deleted or renamed. However, any number of nested subfolders can be created under this folder to further sort the attachments.

There are some **built-in folders** that will appear automatically to presort files based on **file type**, for example, when an email with **file extension (.MSG)** is imported, it will be placed in a folder called **"emails"** by default.

The **built-in folders** can be identified by the Folder icon to the left of the name. The names of these folders can only be **added or edited by a system administrator**. They will appear in the **Category drop-**

down as options. The built-in folders will always be nested directly under the main matter folder. Any number of sub-folders can be created under the main matter folder.



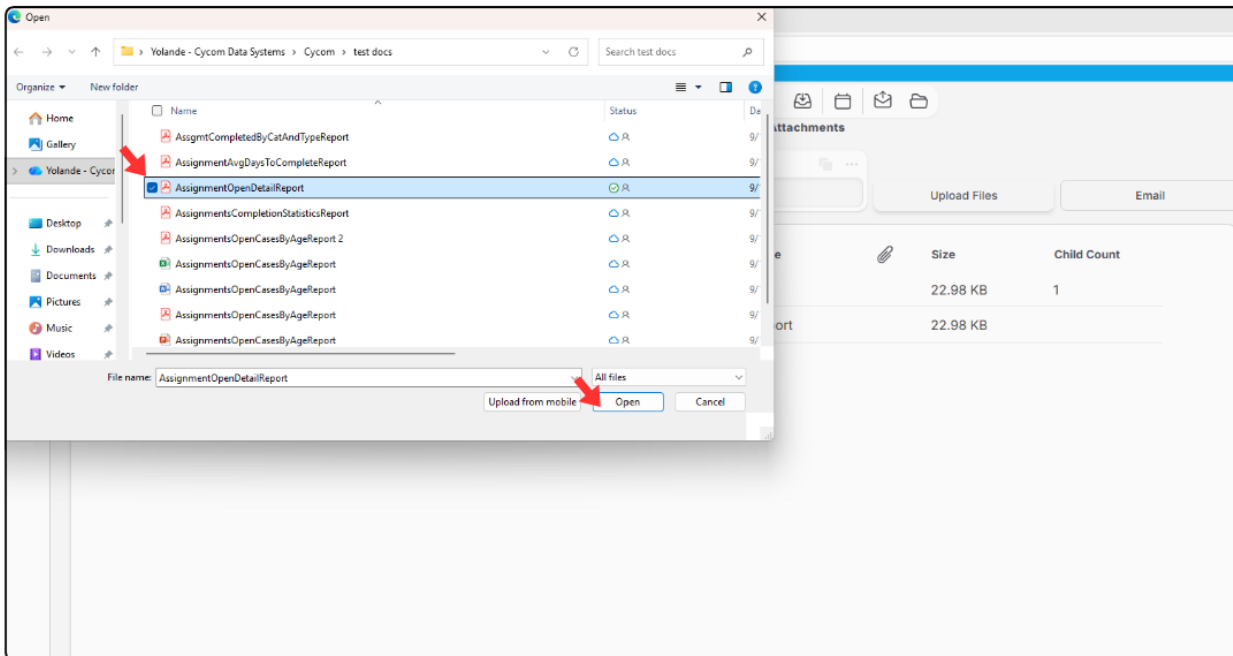
<input type="checkbox"/>	Name
+	 Department File
+	 Evidence Documents
+	 Photo
+	 Video

5 rows

The **columns in the table** listing the sub-folders can be **rearranged in an ascending or descending order** by clicking on the heading of the column, **Name, Last Modified, Category, Type, or Child Count** (referring to the number of files within the folder). Clicking a third time will reset to its original listing. The **Plus sign** to the left of the folder allows for **expanding or collapsing the content** of the folder. Any file not placed in a folder will be listed separately.

Importing

To import a file, click Upload Files button on top left. The file explorer on your desktop will appear to select the file you wish to attach to the selected matter. Click Open to attach it to the matter.



An **Upload Files** card will appear. Enter the relevant information related such as **Category, Type, Color, Staff and Summary**. The preparer's name will automatically be entered. The file name can be edited or changed before the **Upload** button is clicked to save the file to the matter.

Assignments Matter Attachments Options

Upload Files

Upload Reset Test Matter 22
A26-0022

To Save and attach to matter

File Names

File 1	...
AssignmentOpenDetailReport	...

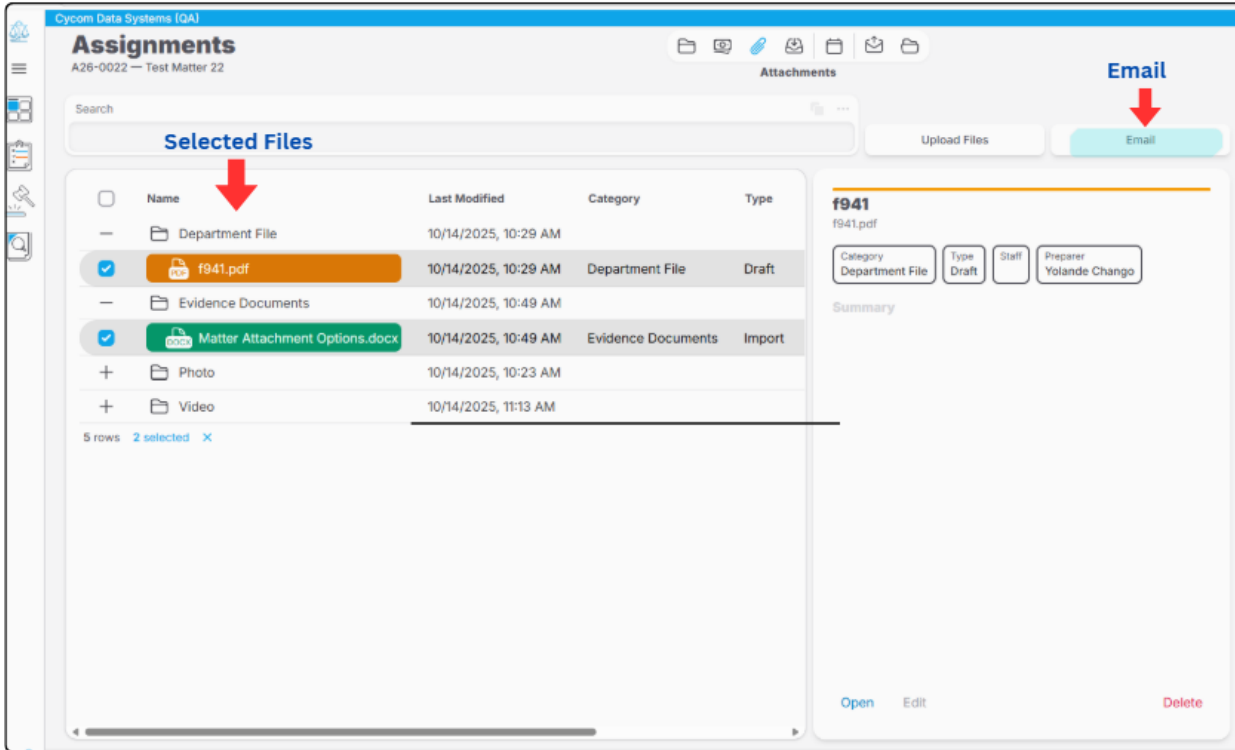
File Metadata

Category	Type
Agreement (AGMT)	Draft (DRAFT)
Color	Staff
Yellow	A TEAM (5295)
Preparer	...
Yolande Chango (YCSTR)	...
Summary	...
Testing file uploading in Attachments	

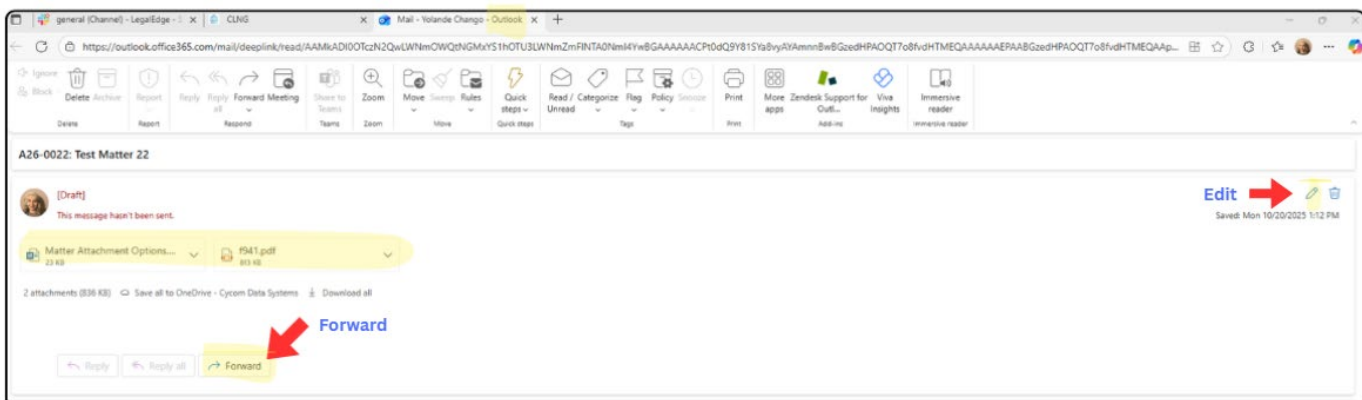
Emailing

To email a file, select the file or any number of files then click the **Email** button on the top right.

Assignments Matter Attachments Options

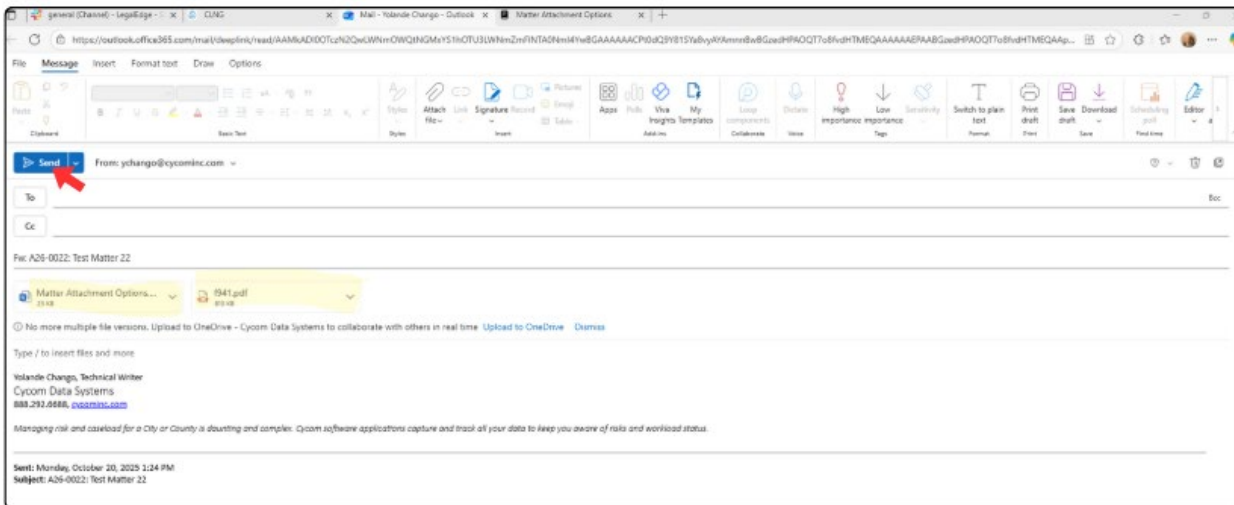


Outlook will open an **email draft** with the selected file/files already attached. Click **edit (pencil icon)** forward.



Assignments Matter Attachments Options

An **email** will be opened with the attachments. Enter the required information and hit **Send**.

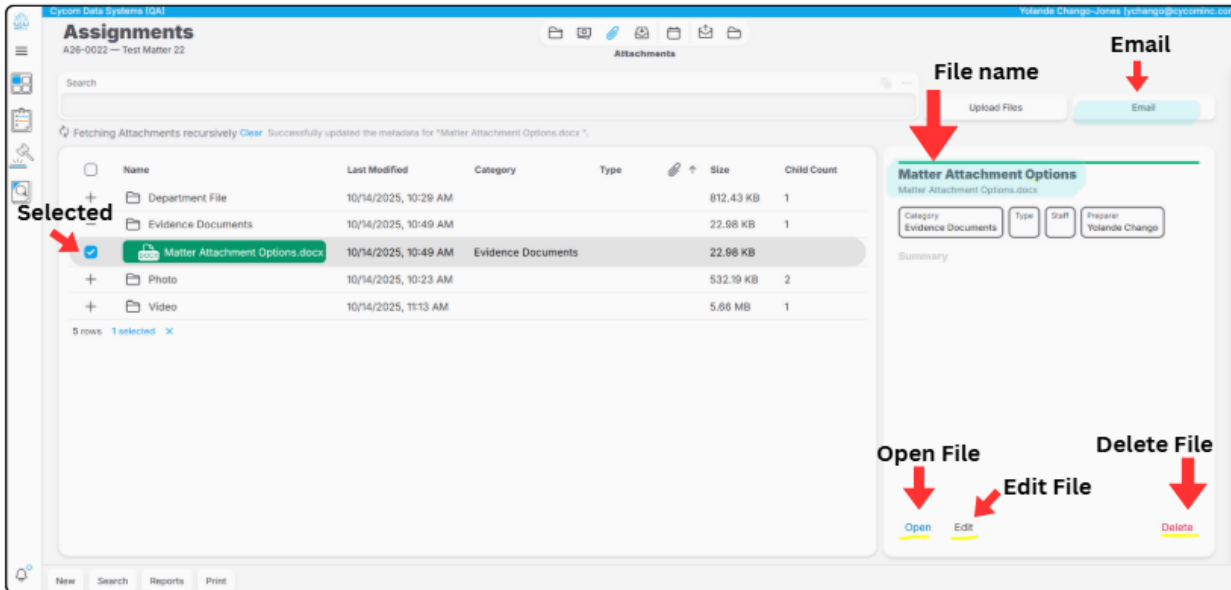


Editing

When a file is selected, a window will appear to the right with the file name and its contents. To edit the file, click the **Edit** button on the bottom left. An **Edit Attachment Metadata** card will open (see image below). After editing, click **Save on the top left**.

To open or to read the file, click the **Open** button on the bottom left. To delete the file, click the **Delete** button on the bottom right.

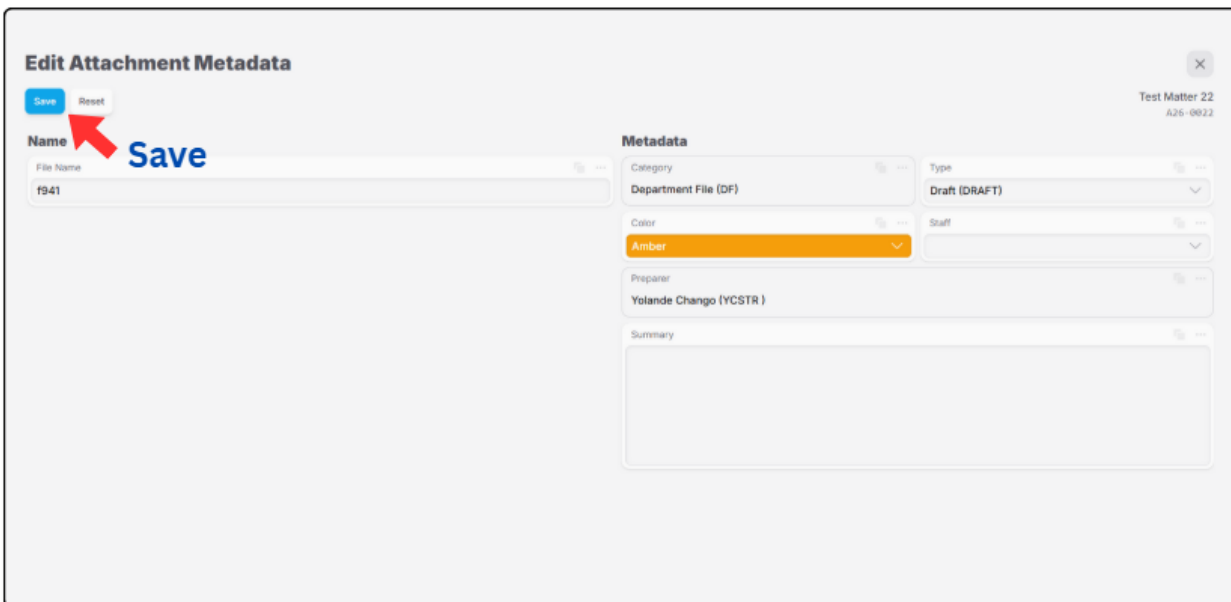
Assignments Matter Attachments Options



The screenshot shows the 'Attachments' section of the 'Assignments' page for 'A26-0022 - Test Matter 22'. A table lists several attachments, with 'Matter Attachment Options.docx' selected. A red arrow labeled 'Selected' points to the checkmark in the selection column. To the right, a card titled 'Matter Attachment Options' displays the file name 'Matter Attachment Options.docx' and its category 'Evidence Documents'. Annotations with red arrows point to the 'File name' and 'Email' buttons at the top, and the 'Open File', 'Edit File', and 'Delete File' buttons at the bottom of the card.

Name	Last Modified	Category	Type	Size	Child Count
Department File	10/14/2025, 10:28 AM			812.43 KB	1
Evidence Documents	10/14/2025, 10:49 AM			22.98 KB	1
<input checked="" type="checkbox"/> Matter Attachment Options.docx	10/14/2025, 10:49 AM	Evidence Documents		22.98 KB	
Photo	10/14/2025, 10:23 AM			532.19 KB	2
Video	10/14/2025, 11:13 AM			5.66 MB	1

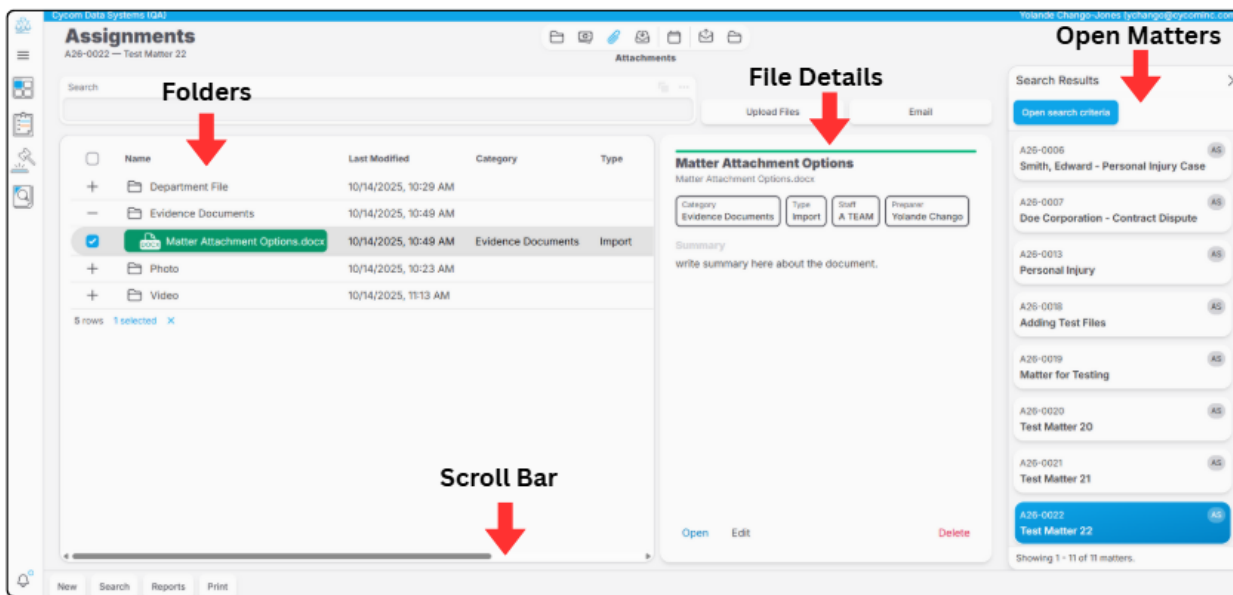
Edit Attachment Metadata card:



The screenshot shows the 'Edit Attachment Metadata' card for 'Test Matter 22'. The card has a 'Name' field with the value '1941' and a 'Save' button. A red arrow points to the 'Save' button. The 'Metadata' section includes fields for 'Category' (Department File (DF)), 'Type' (Draft (DRAFT)), 'Color' (Amber), and 'Preparer' (Yolande Change (YCSTR)).

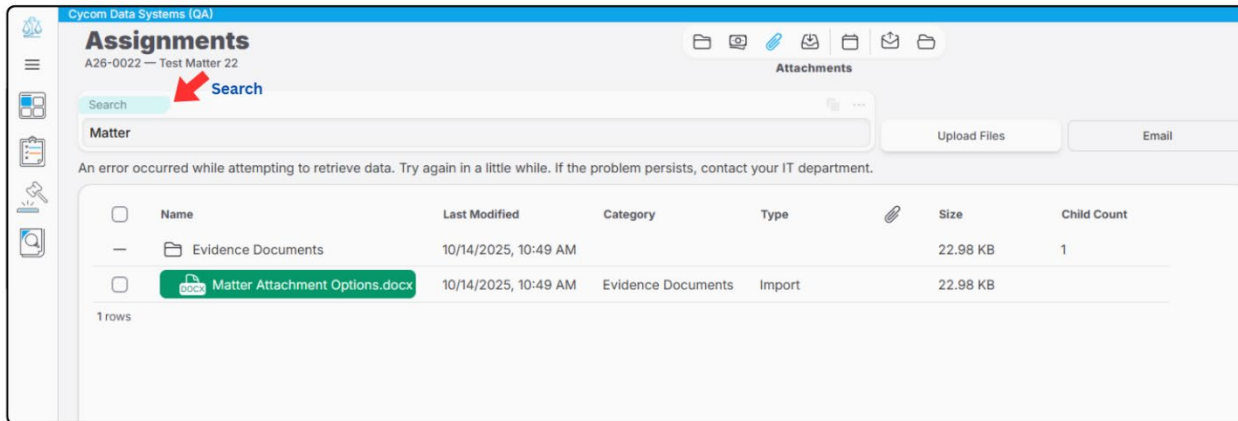
Assignments Matter Attachments Options

A scroll bar will appear at the bottom of the **Folders** panel if other views are also open. To access the other columns in the table, use the **scroll bar**. Alternatively, to **zoom in or out**, use the **Control key** while **scrolling with the mouse**.



Searching

To **Search** for a specific file, **enter a key word or the complete name of the file**, and it will be listed in the subfolders panel for a quick find and review.



Exiting

To **exit the Attachments** screen, click on the **Summary** icon on the **Module Tool Bar** and return to the current selected matter or click on any

If you discover an error in this document, or if you encounter any problems performing any steps described, please contact **Cycom Support** at support@cycominc.com or by calling **888-292-6688**.