

This section includes **Importing/Uploading, 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.

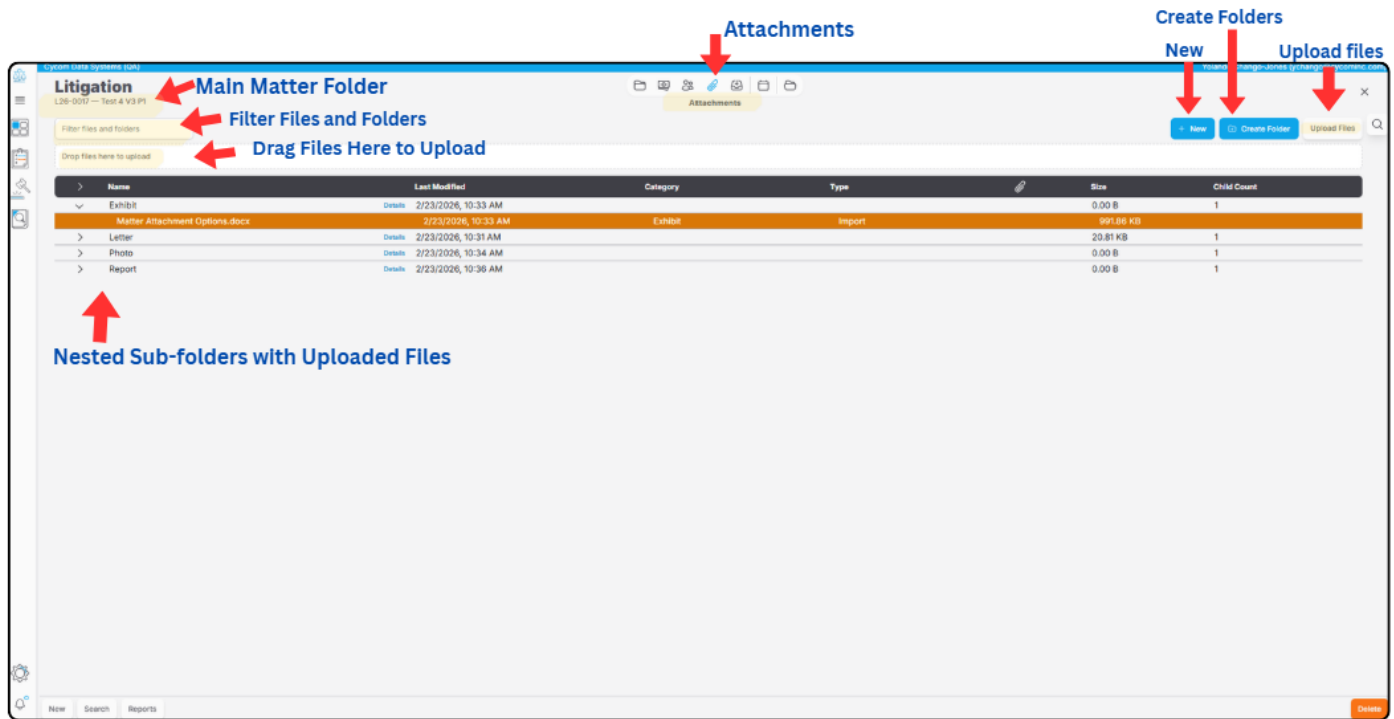
- Document and Text: **DOC, PDF, RTF, TXT**
- Image Files: **JPEG, PNG, BMP**
- Audio Files: **WAV, MP3**
- Video Files: **MP4, AVI, MOV**
- Email Files: **MSG**

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

Contents For Attachments:

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General Layout & Organization



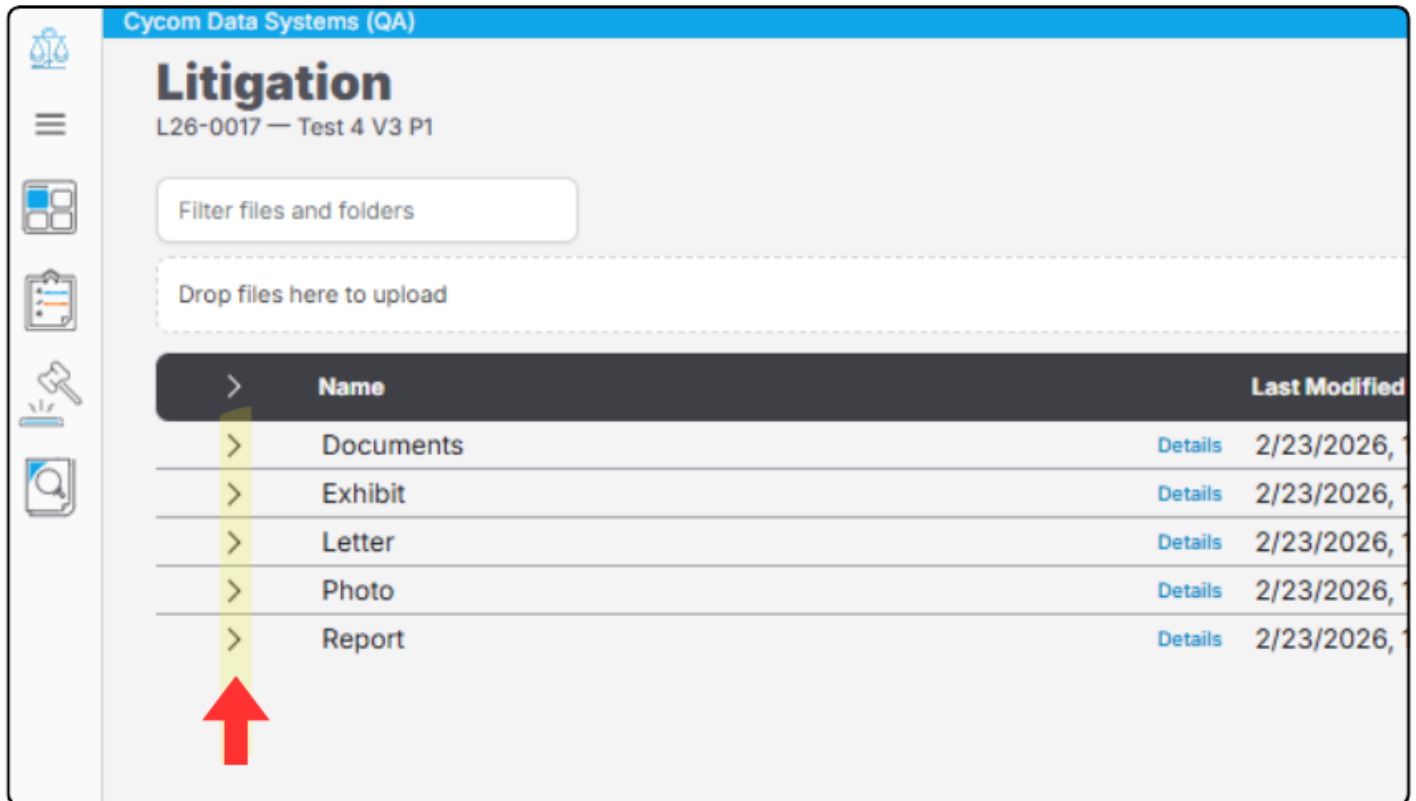
Files for a matter can be viewed in the **Attachments view**. It shows a **tree or hierarchy of nested folders** on the left panel. To the right is the display of the **current selected folder's contents**. At the top of the tree, there will always be the **main folder of the matter itself**; this is labeled with the **file number and name 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 the **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 **Chevron** symbol 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.



The screenshot shows the 'Litigation' interface for matter L26-0017 — Test 4 V3 P1. It features a search filter, an upload area, and a table of sub-folders. A red arrow points to the chevron icon next to the 'Report' folder.

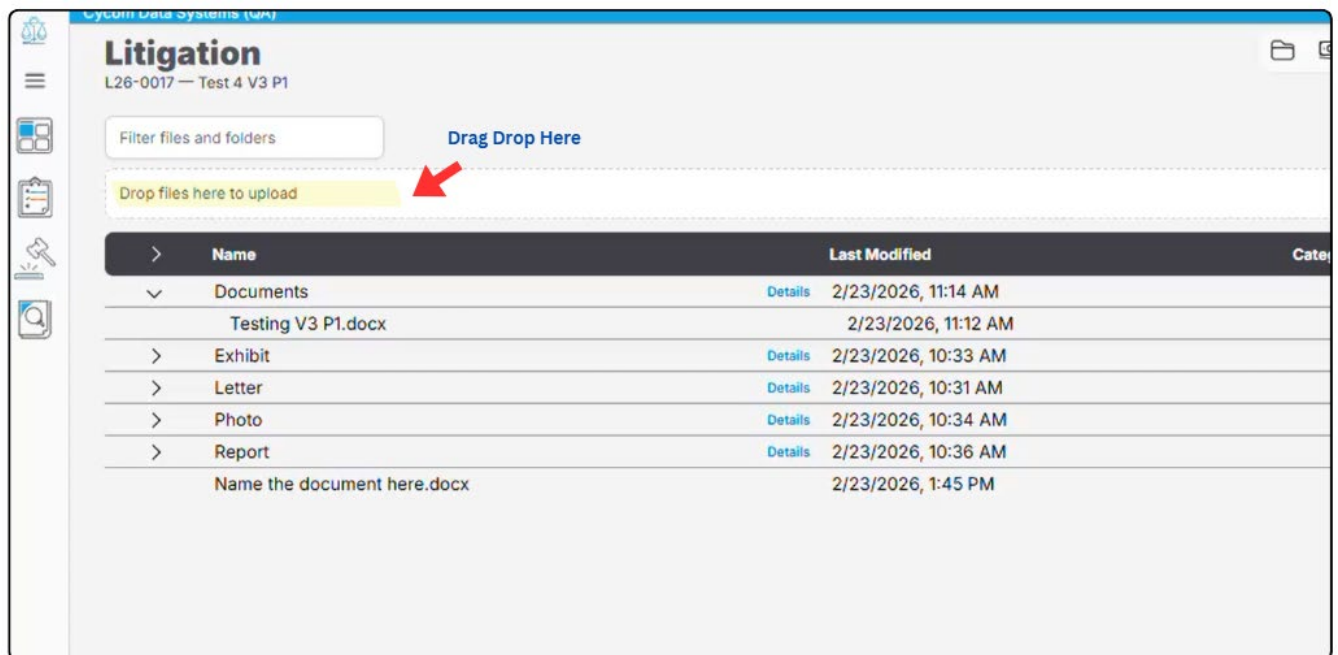
>	Name		Last Modified
>	Documents	Details	2/23/2026, 1
>	Exhibit	Details	2/23/2026, 1
>	Letter	Details	2/23/2026, 1
>	Photo	Details	2/23/2026, 1
>	Report	Details	2/23/2026, 1

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, Sub-attachment, Size, or Child Count** (referring to the number of files within the folder). Clicking a third time will reset to its original listing. The **Chevron** 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.

Uploading Files

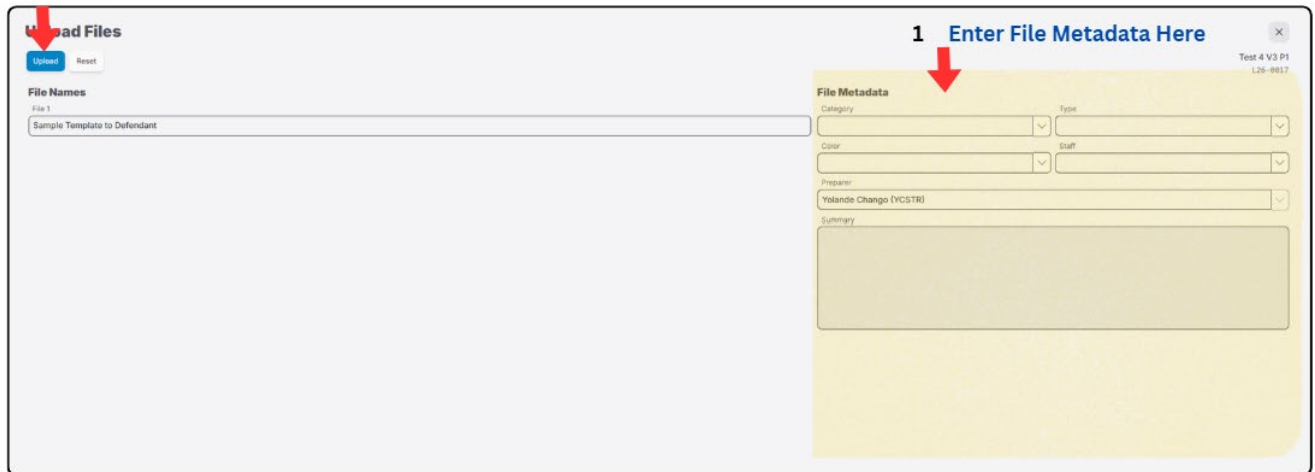
There are two ways to import a file:

1. Drag and drop files from your desktop computer to the designated location in CLNG. Open your File Explorer, select the file hold, drag and drop into the **Drop file here to upload** banner.

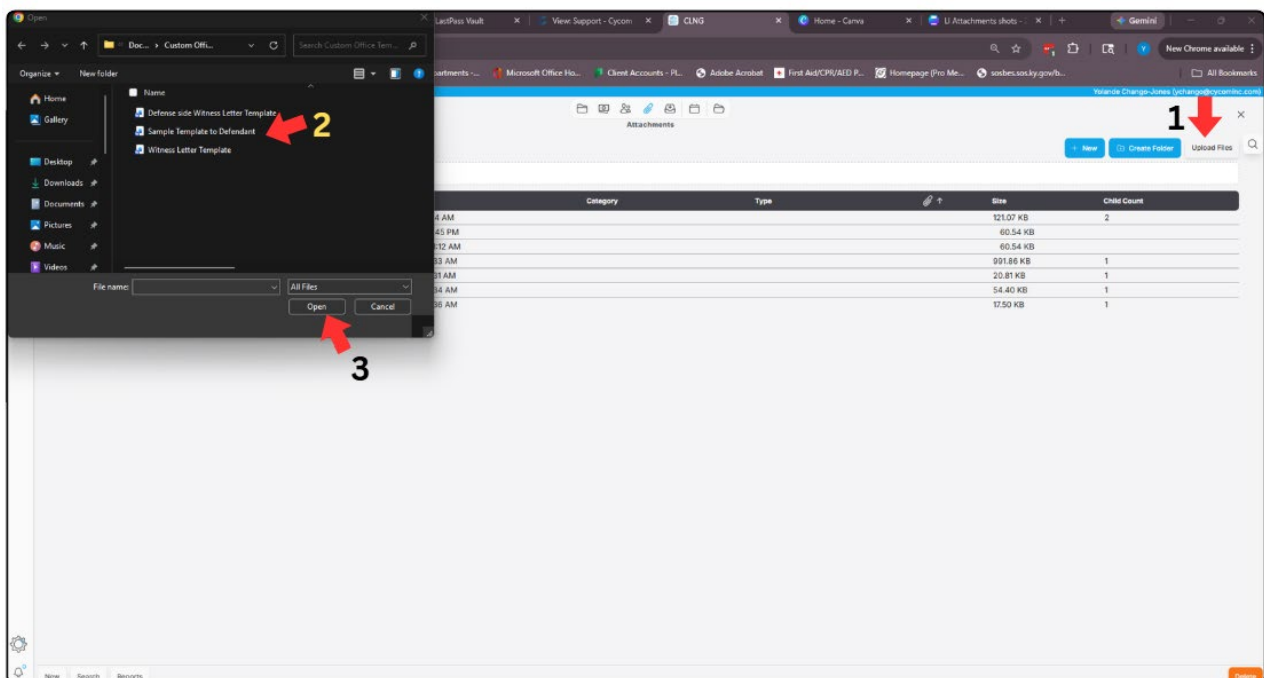


The **Upload Files** window will open for you to enter the **File Name and File Metadata**, such as **Category, Type, Staff** and **Summary**. The Preparer's name will be entered automatically. Next, click **Upload**. The file will appear in the list of **Attachments**.

2 Upload

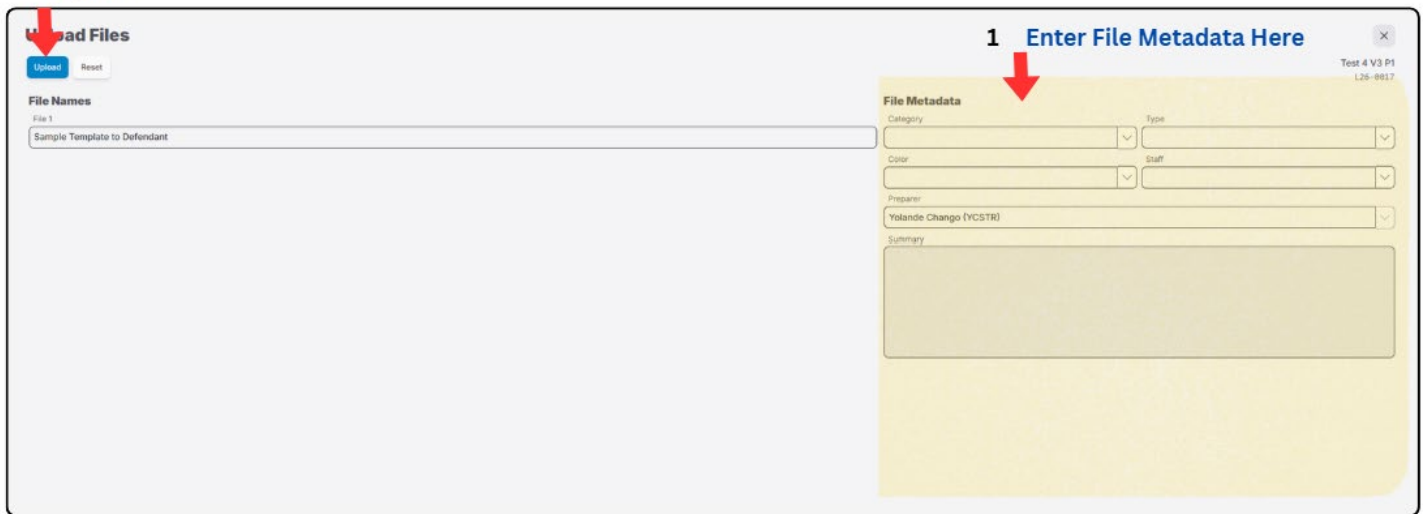


2. Click **Upload Files** button on top right. The file explorer on your desktop will appear to **select the file** you wish to attach to the selected matter. Click **Open** to attach it to the matter.



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.

2 Upload

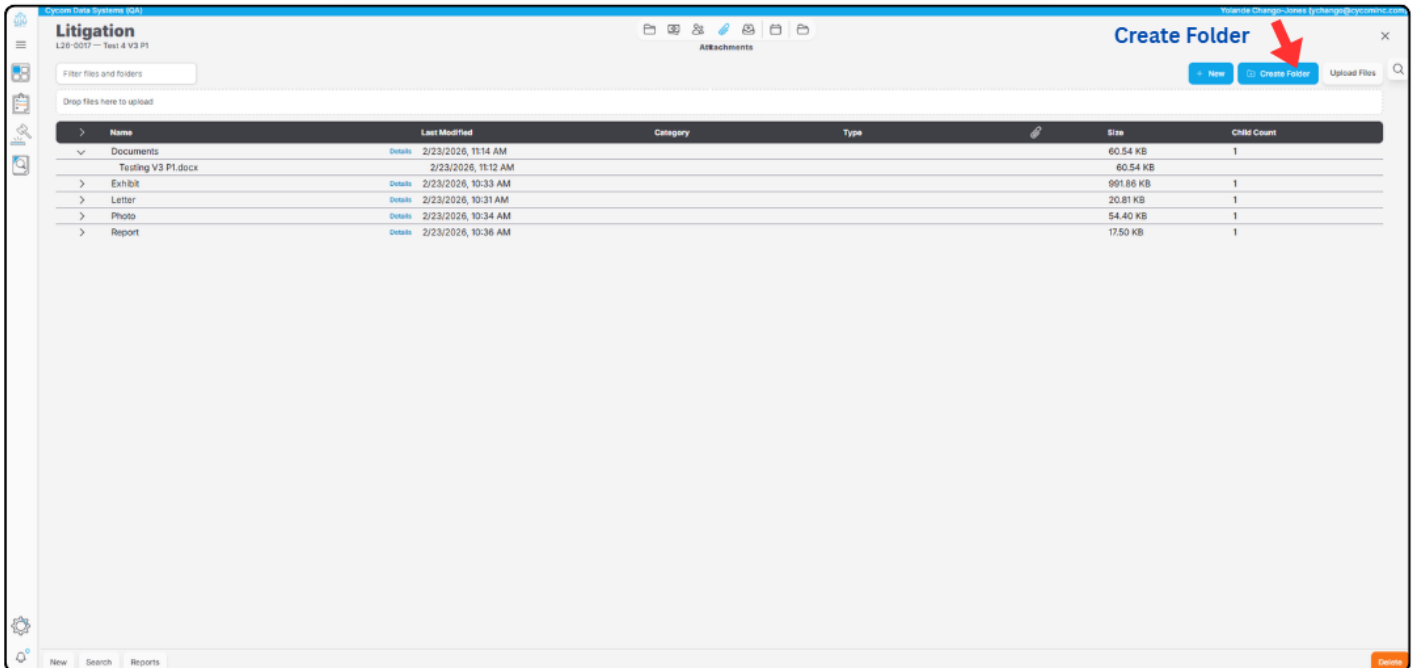


The screenshot shows the 'Upload Files' interface. On the left, there is a section titled 'Upload Files' with an 'Upload' button and a 'Reset' button. Below this is a 'File Names' section with a text input field containing 'Sample Template to Defendant'. On the right, there is a 'File Metadata' section with a yellow background. This section contains several dropdown menus: 'Category', 'Type', 'Color', and 'Staff'. The 'Preparer' field is pre-filled with 'Yolande Chango (YCSTR)'. Below these is a 'Summary' text area. A red arrow labeled '1' points to the 'File Metadata' section, and another red arrow labeled '2' points to the 'Upload' button.

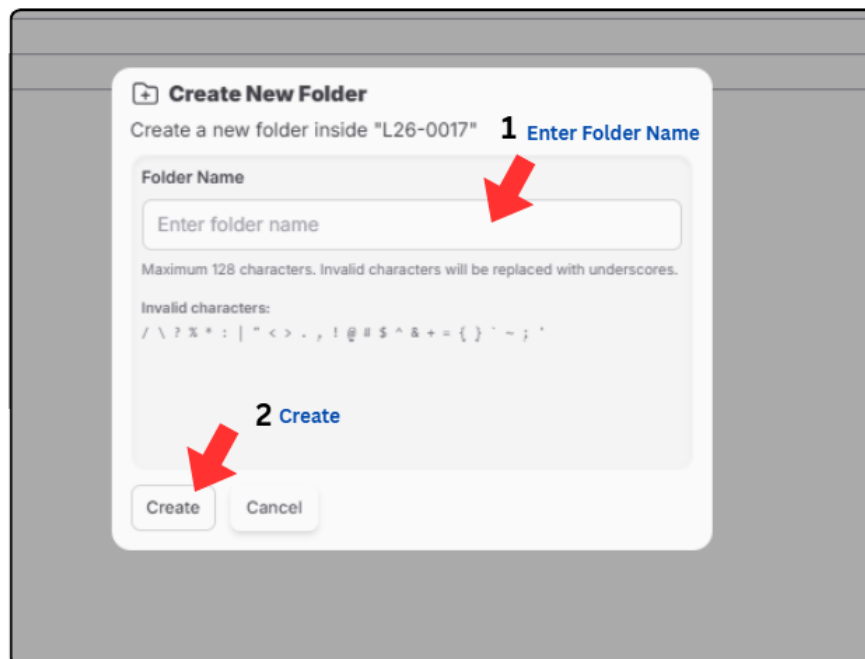
Creating Folders

To create a folder, click the **Create Folder** button. Using this Create Folder button while working on a particular matter the folder will not appear in the Category list only under this matter in the **Attachments** view. The list in the Category drop-down is set by the systems administrator to appear as options under any matter.

CLNG Litigation Matter Attachments Options

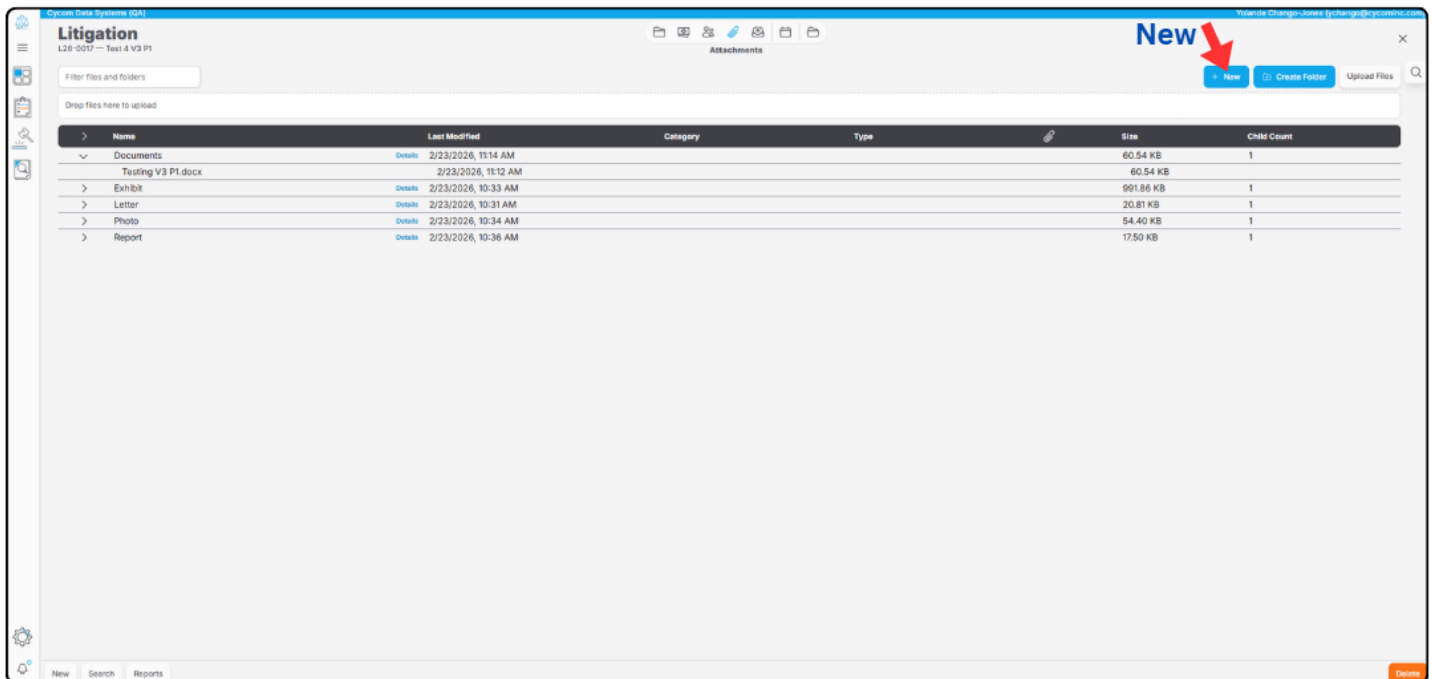


Next, a **Create New Folder** card will appear. **Enter the folder name** you wish to create and click **Create**. The new folder will appear in the list of folders.



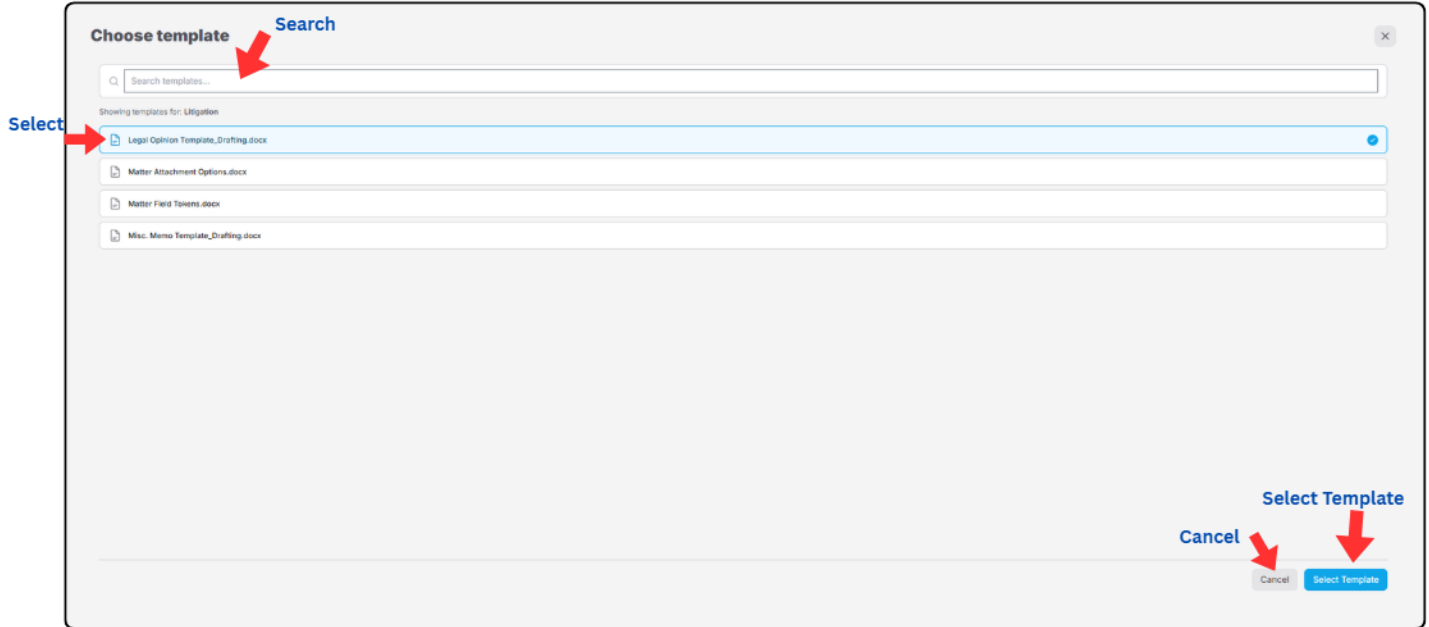
Adding New Documents from Templates

To add a new document, click **New**.

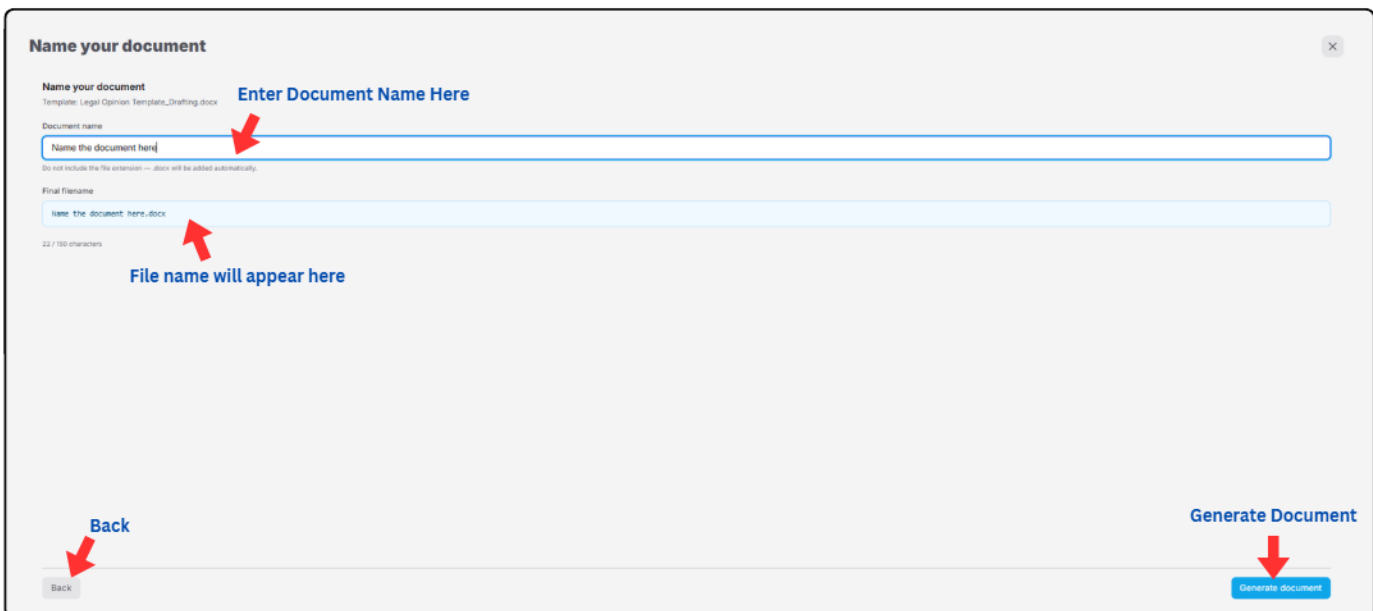


A **Choose Template** card will open. You may **search** for a specific template or **select** it from the list provided by your systems administrator. Next, click **Select Template** or **Cancel** should you wish to return to your previous screen.

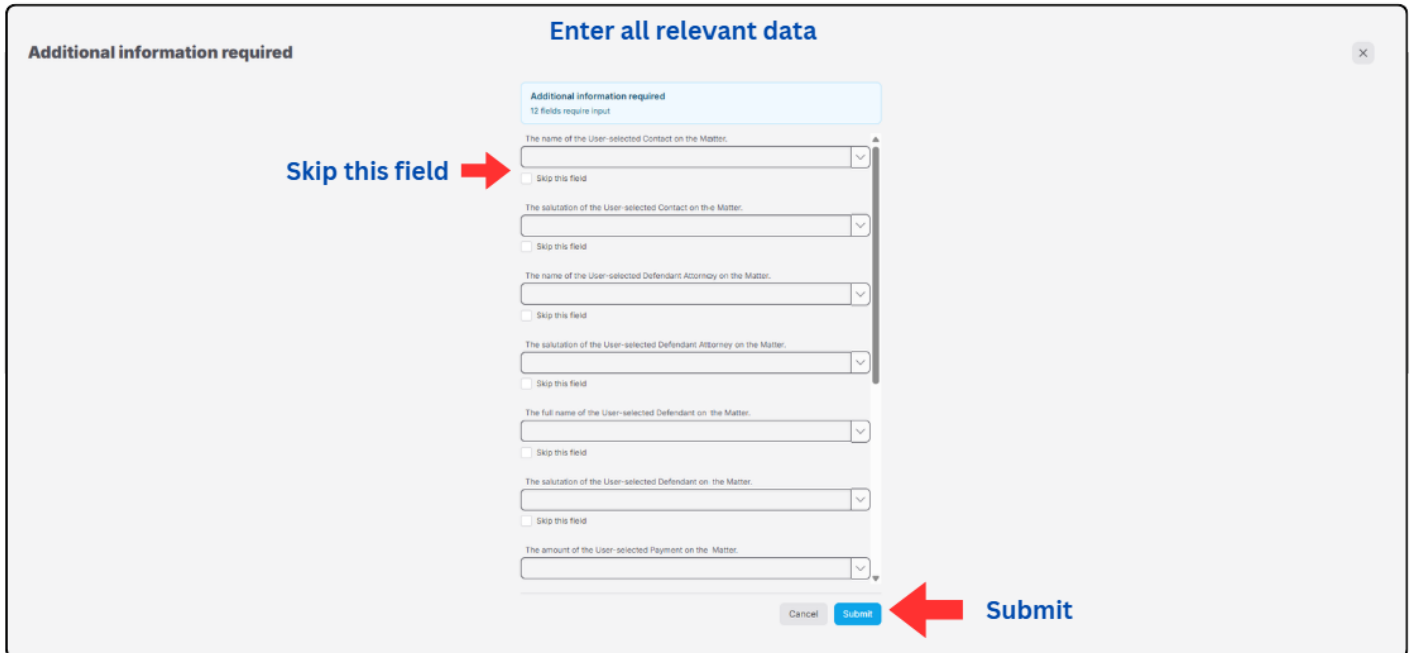
CLNG Litigation Matter Attachments Options



Next, a **Name your document** card will open. Enter a name for the document you wish to create, then click **Generate Document**. The **Back** button will return you to your previous screen.



The **Additional information required** card will open. Enter the relevant data. Any field that does not apply, check the box **Skip this field**. When done, click **Submit**.



The screenshot shows a modal window titled "Additional information required" with a subtitle "Enter all relevant data". The form contains several dropdown menus, each with a "Skip this field" checkbox. A red arrow points to the "Skip this field" checkbox for the first dropdown. At the bottom right, a red arrow points to the "Submit" button.

Additional information required (12 fields require input)

The name of the User-selected Contact on the Matter. Skip this field

The salutation of the User-selected Contact on the Matter. Skip this field

The name of the User-selected Defendant Attorney on the Matter. Skip this field

The salutation of the User-selected Defendant Attorney on the Matter. Skip this field

The full name of the User-selected Defendant on the Matter. Skip this field

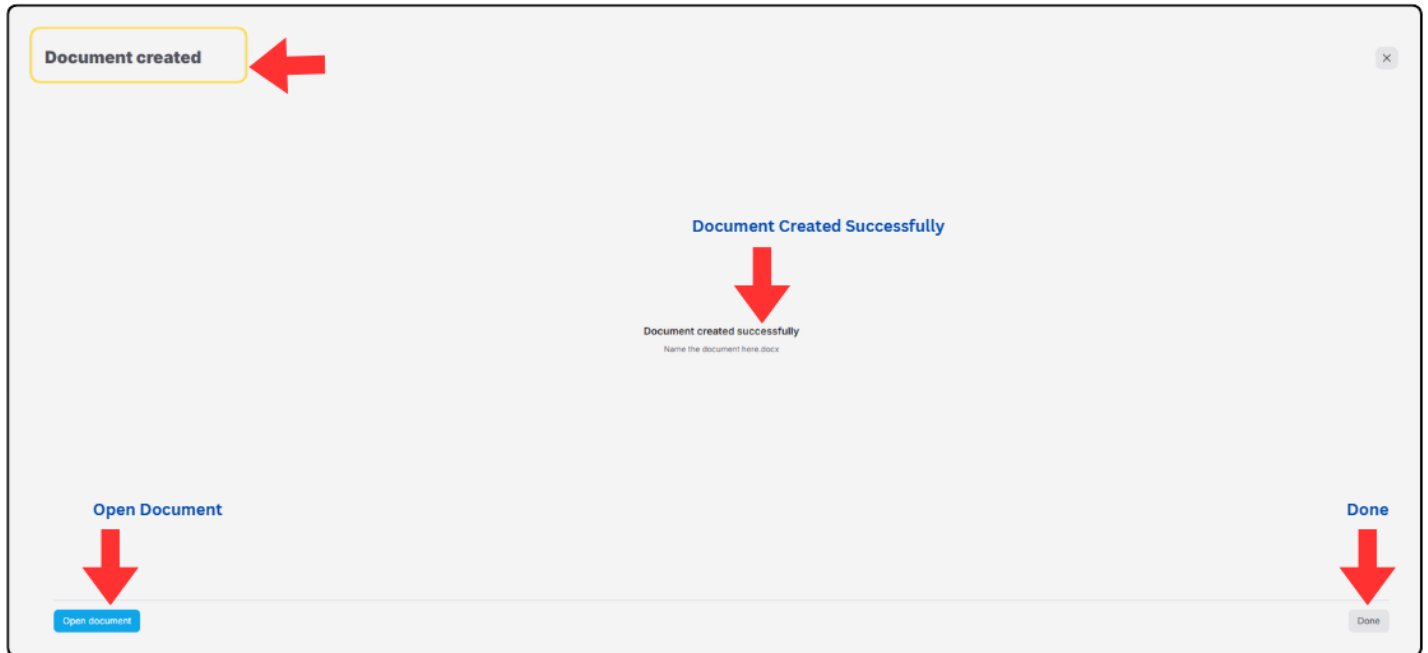
The salutation of the User-selected Defendant on the Matter. Skip this field

The amount of the User-selected Payment on the Matter. Skip this field

Cancel **Submit**

A Document Created Successfully notice will appear in a new card. Click **Open Document** to further work on it or **Done** button if you are finished.

The Document will open in a new Tab in Microsoft Word.



Drag and Drop Files

Drag and drop files from your desktop computer to the designated location in CLNG. ([See Upload Files](#))

The **Upload Files** window will open for you to enter the **File Name and File Metadata**, such as **Category, Type, Staff** and **Summary**. The Preparer's name will be entered automatically. The file will appear in the list of attachments as a stand-alone document. If you wish to file it in a designated folder, drag and drop it into the folder.

CLNG Litigation Matter Attachments Options

Cycom Data Systems (QA)

Litigation

L26-0017 — Test 4 V3 P1

Filter files and folders

Drop files here to upload

>	Name	Last Modified	Category
∨	Documents	Details 2/23/2026, 11:14 AM	
	Testing V3 P1.docx	2/23/2026, 11:12 AM	
>	Exhibit	Details 2/23/2026, 10:33 AM	
>	Letter	Details 2/23/2026, 10:31 AM	
>	Photo	Details 2/23/2026, 10:34 AM	
>	Report	Details 2/23/2026, 10:36 AM	
	Name the document here.docx	2/23/2026, 1:45 PM	

Hold and Drag

Cycom Data Systems (QA)

Litigation

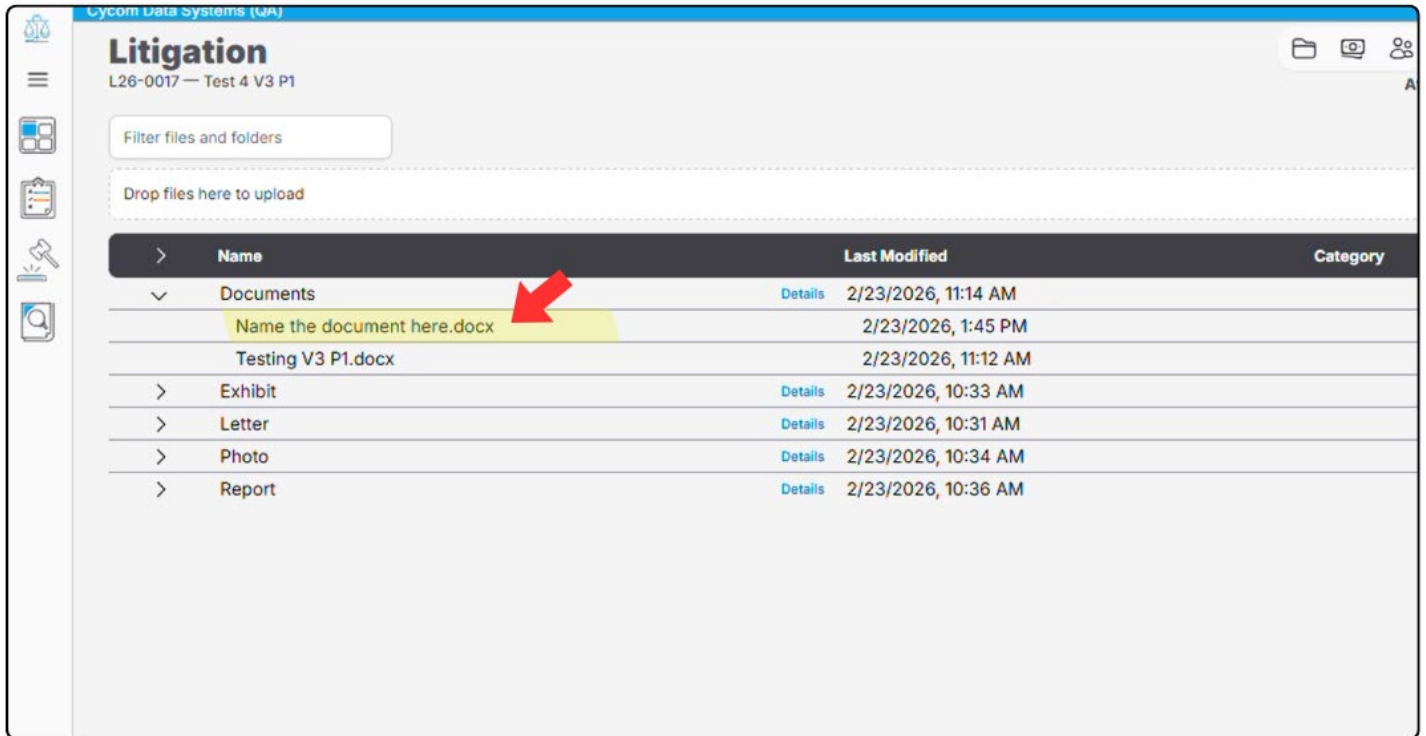
L26-0017 — Test 4 V3 P1

Filter files and folders

Drop files here to upload

Drop in Folder

>	Name	Last Modified	Category
	Name the document here.docx		
>	Exhibit	Details 2/23/2026, 10:33 AM	
>	Letter	Details 2/23/2026, 10:31 AM	
>	Photo	Details 2/23/2026, 10:34 AM	
>	Report	Details 2/23/2026, 10:36 AM	

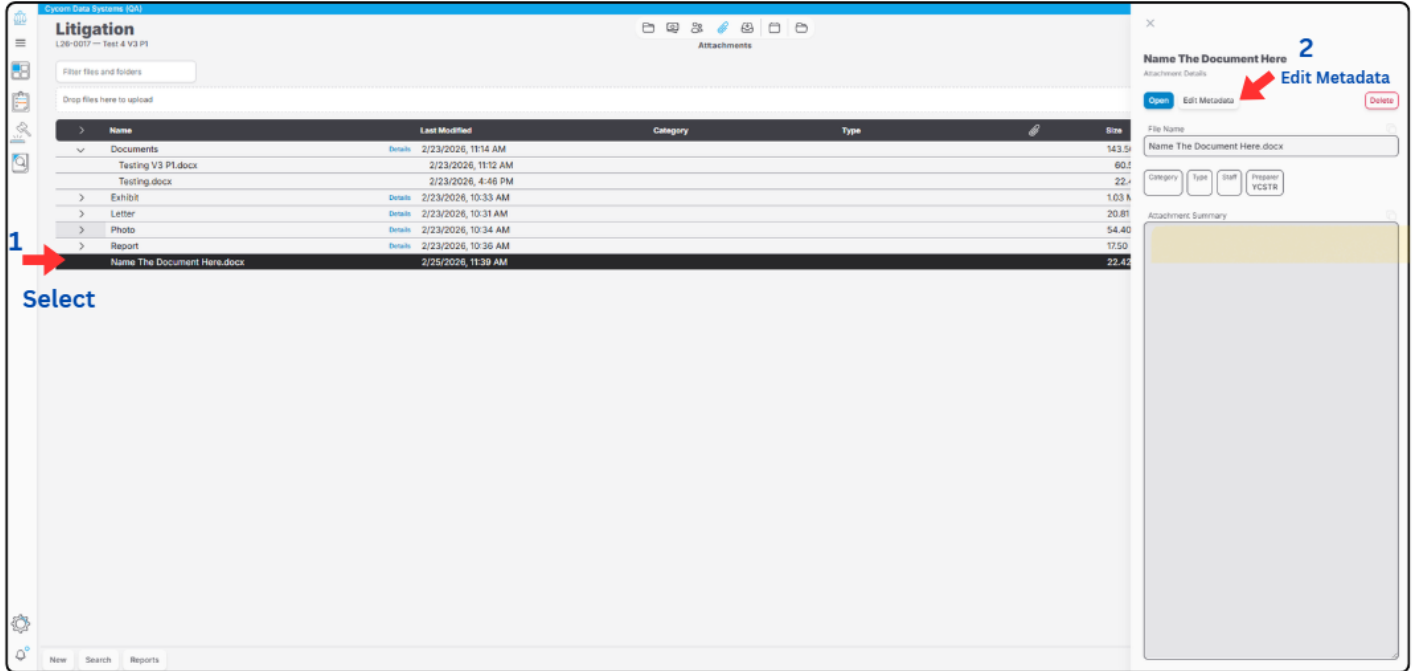


The screenshot shows the 'Litigation' interface for matter L26-0017 — Test 4 V3 P1. It features a sidebar with navigation icons, a search bar, and a file list table. A red arrow points to the document 'Name the document here.docx' in the 'Documents' folder.

>	Name		Last Modified	Category
∨	Documents		Details 2/23/2026, 11:14 AM	
	Name the document here.docx		2/23/2026, 1:45 PM	
	Testing V3 P1.docx		2/23/2026, 11:12 AM	
>	Exhibit		Details 2/23/2026, 10:33 AM	
>	Letter		Details 2/23/2026, 10:31 AM	
>	Photo		Details 2/23/2026, 10:34 AM	
>	Report		Details 2/23/2026, 10:36 AM	

Another option is: Open the document or file, a **Matter Attachment Options** panel will open to the right, click **Edit Metadata**. Enter a **Category** and **Type** or any other details you wish, then click **Save**. The document will be filed in the proper folder.

CLNG Litigation Matter Attachments Options



1 Select

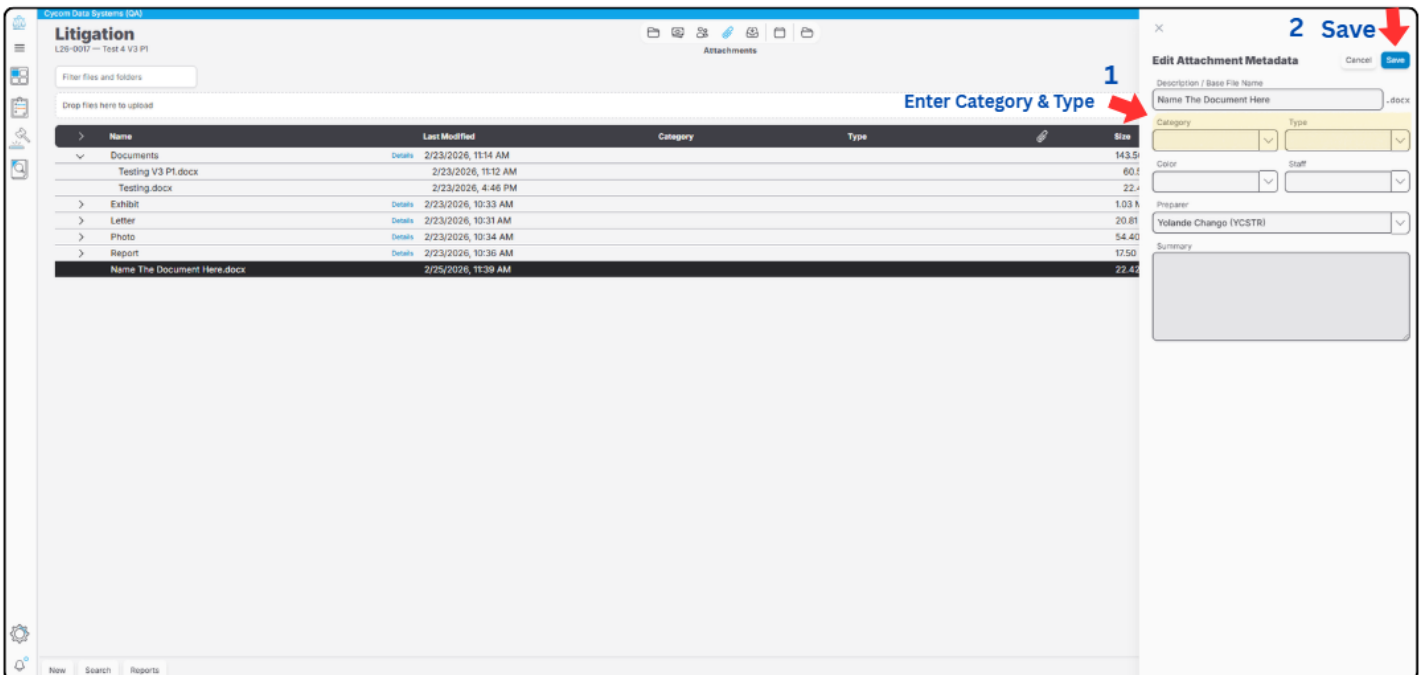
Name	Last Modified	Category	Type	Size
Documents	2/23/2026, 11:14 AM			143.5 K
Testing V3 P1.docx	2/23/2026, 11:12 AM			60.1 K
Testing.docx	2/23/2026, 4:46 PM			22.1 K
Exhibit	2/23/2026, 10:33 AM			1.03 M
Letter	2/23/2026, 10:31 AM			20.8 K
Photo	2/23/2026, 10:34 AM			54.4 K
Report	2/23/2026, 10:36 AM			17.5 K
Name The Document Here.docx	2/25/2026, 11:39 AM			22.4 K

2 Name The Document Here **Edit Metadata**

File Name: Name The Document Here.docx

Category: [] Type: [] Staff: [] Preparer: YCSTR

Attachment Summary



1 Enter Category & Type

2 Save

Edit Attachment Metadata Cancel Save

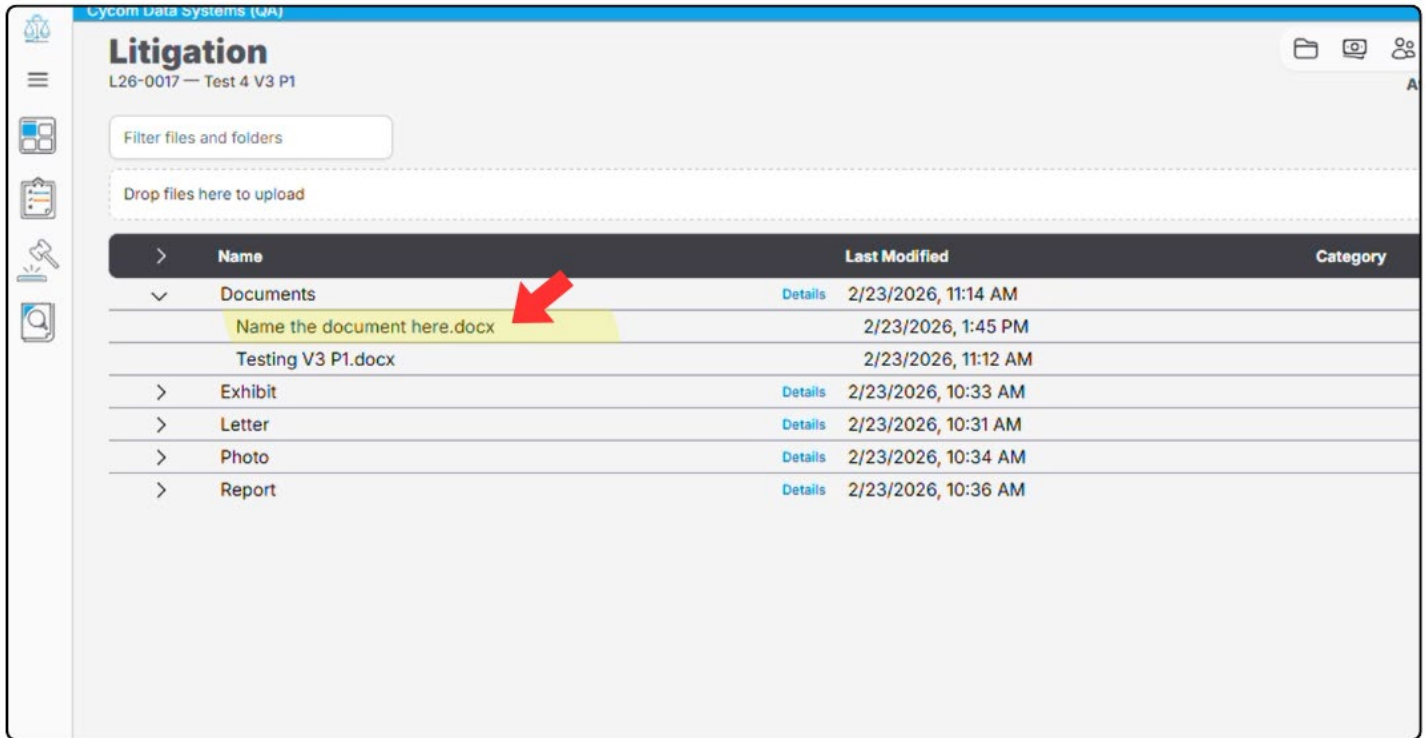
Description / Base File Name: Name The Document Here .docx

Category: [] Type: []

Color: [] Staff: []

Preparer: Yolande Chango (YCSTR)

Summary

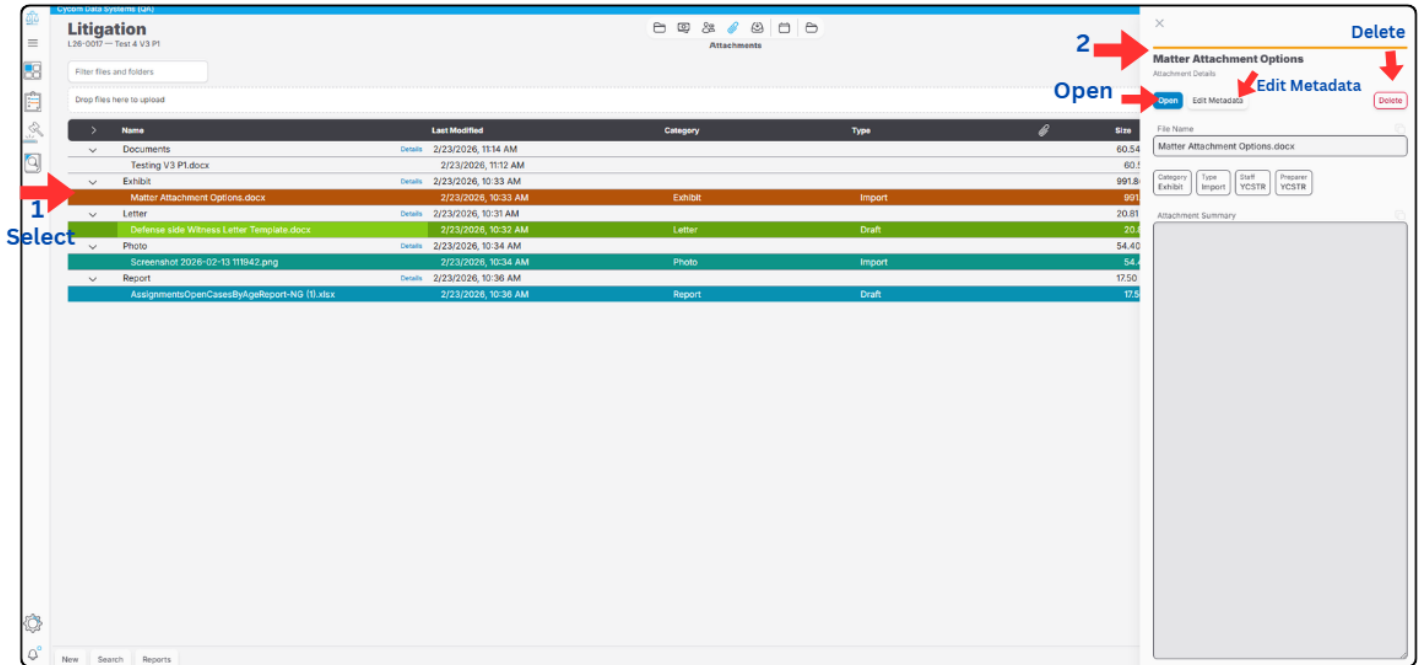


The screenshot shows the 'Litigation' interface for 'L26-0017 — Test 4 V3 P1'. It features a search bar, an upload area, and a table of files. A red arrow points to the file 'Name the document here.docx' in the 'Documents' category.

>	Name	Last Modified	Category
∨	Documents	Details 2/23/2026, 11:14 AM	
	Name the document here.docx	2/23/2026, 1:45 PM	
	Testing V3 P1.docx	2/23/2026, 11:12 AM	
>	Exhibit	Details 2/23/2026, 10:33 AM	
>	Letter	Details 2/23/2026, 10:31 AM	
>	Photo	Details 2/23/2026, 10:34 AM	
>	Report	Details 2/23/2026, 10:36 AM	

Editing Files

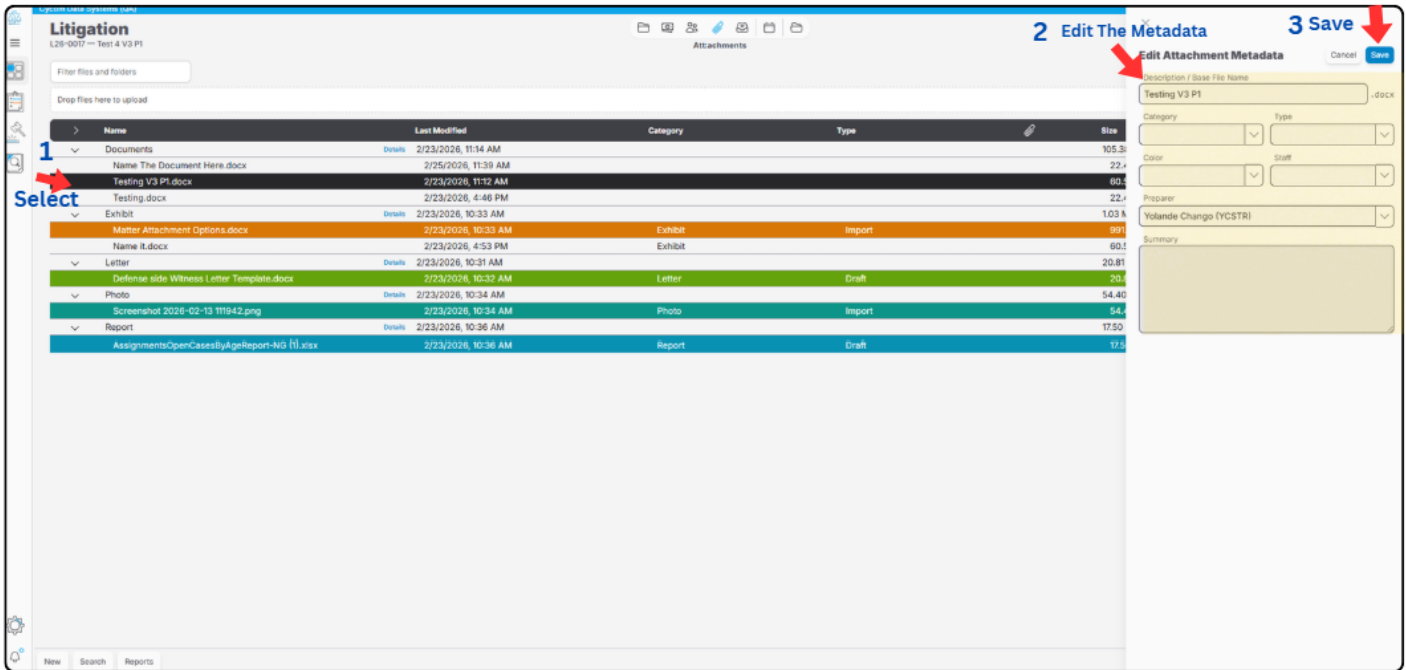
To edit **select the document** or the file you wish to make changes to. A **Matter Attachment Options** panel will open to right. Click **Edit Metadata**.



The screenshot displays the 'Litigation' interface with a table of attachments. A red arrow labeled '1' points to the 'Matter Attachment Options.docx' row. A second red arrow labeled '2' points to the 'Edit Metadata' button in the right-hand panel. The 'Edit Metadata' panel includes fields for 'File Name', 'Category', 'Type', 'Staff', and 'Present', along with 'Open', 'Edit Metadata', and 'Delete' buttons.

Name	Last Modified	Category	Type	Size
Documents	2/23/2026, 11:14 AM			60.54
Testing V3 P1.docx	2/23/2026, 11:12 AM			60.54
Exhibit	2/23/2026, 10:33 AM			991.8
Matter Attachment Options.docx	2/23/2026, 10:33 AM	Exhibit	Import	991.8
Letter	2/23/2026, 10:31 AM			20.81
Defense side Witness Letter Template.docx	2/23/2026, 10:32 AM	Letter	Draft	20.81
Photo	2/23/2026, 10:34 AM			54.40
Screenshot 2026-02-13 11:04:2.png	2/23/2026, 10:34 AM	Photo	Import	54.40
Report	2/23/2026, 10:36 AM			17.50
AssignmentsOpenCasesByAgeReport-NG (1).xlsx	2/23/2026, 10:36 AM	Report	Draft	17.50

An **Edit Attachment Metadata** panel will open. Make the necessary changes or edits then click **Save**. If you wish to **delete** the file, click **delete** in the **Matter Attachment Options** panel.



The screenshot displays the 'Litigation' interface with a table of attachments. A red arrow labeled '1' points to the 'Select' checkbox for the file 'Matter Attachment Options.docx'. Another red arrow labeled '2' points to the 'Edit Attachment Metadata' button. A third red arrow labeled '3' points to the 'Save' button in the metadata form.

Name	Last Modified	Category	Type	Size
Documents	2/23/2026, 11:34 AM			105.3
Name The Document Here.docx	2/25/2026, 11:39 AM			22.2
Testing V3 P1.docx	2/23/2026, 11:12 AM			60.1
Testing.docx	2/23/2026, 4:46 PM			22.2
Exhibit	2/23/2026, 10:33 AM			1.03
Matter Attachment Options.docx	2/23/2026, 10:33 AM	Exhibit	Import	991
Name It.docx	2/23/2026, 4:53 PM	Exhibit		60.1
Letter	2/23/2026, 10:31 AM			20.81
Defense side Witness Letter Template.docx	2/23/2026, 10:32 AM	Letter	Draft	20.81
Photo	2/23/2026, 10:34 AM			54.40
Screenshot-2026-02-13 111942.png	2/23/2026, 10:34 AM	Photo	Import	54.40
Report	2/23/2026, 10:36 AM			17.50
Assignments/OpenCasesByAgeReport-A6 (1).xlsx	2/23/2026, 10:36 AM	Report	Draft	17.50

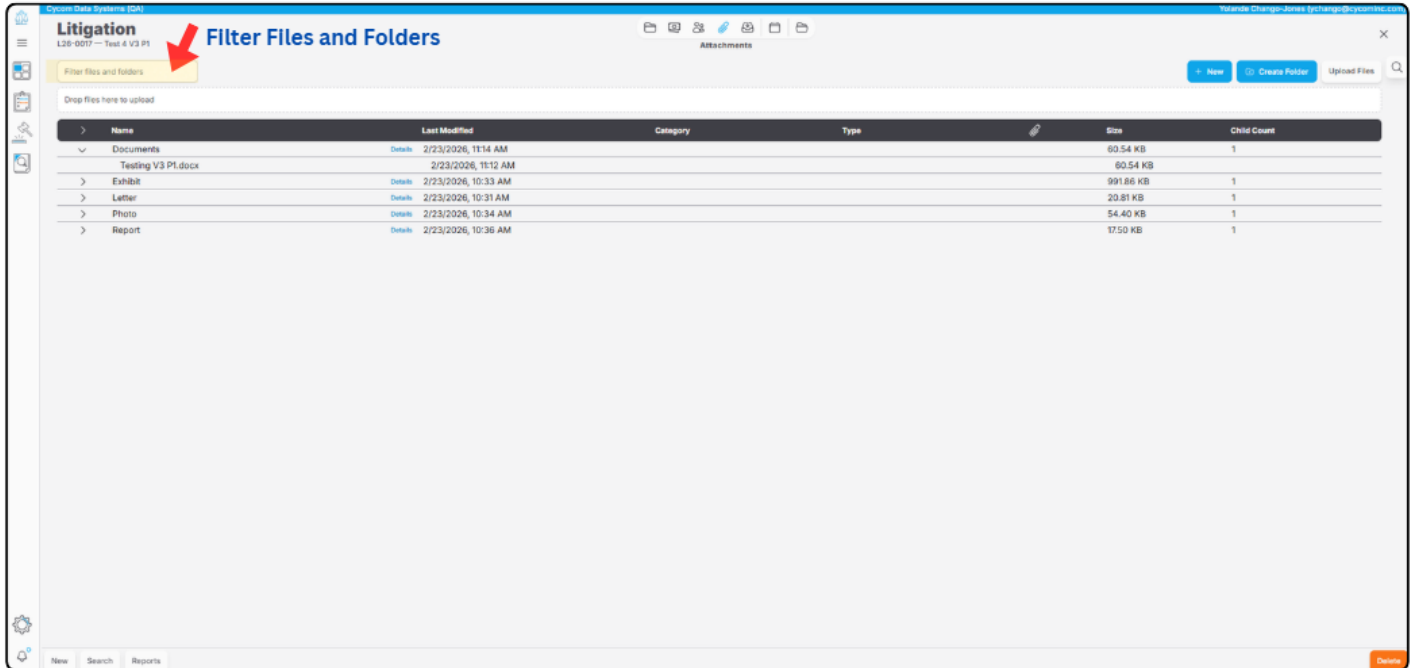
The 'Edit Attachment Metadata' form on the right includes fields for:

- Description / Base File Name: Testing V3 P1
- Category: [Dropdown]
- Type: [Dropdown]
- Color: [Dropdown]
- Draft: [Dropdown]
- Preparer: [Dropdown]
- Volante Change (YCSTRI): [Dropdown]
- Summary: [Text Area]

Filtering Files and Folders

A wonderful feature that allows you to **filter your search** by entering a **partial word, a part or full name** of a file/document or folder, or a **file number or part of the number**. You can also filter **by file type** such as docx, png, pdf, xlsx, etc...).

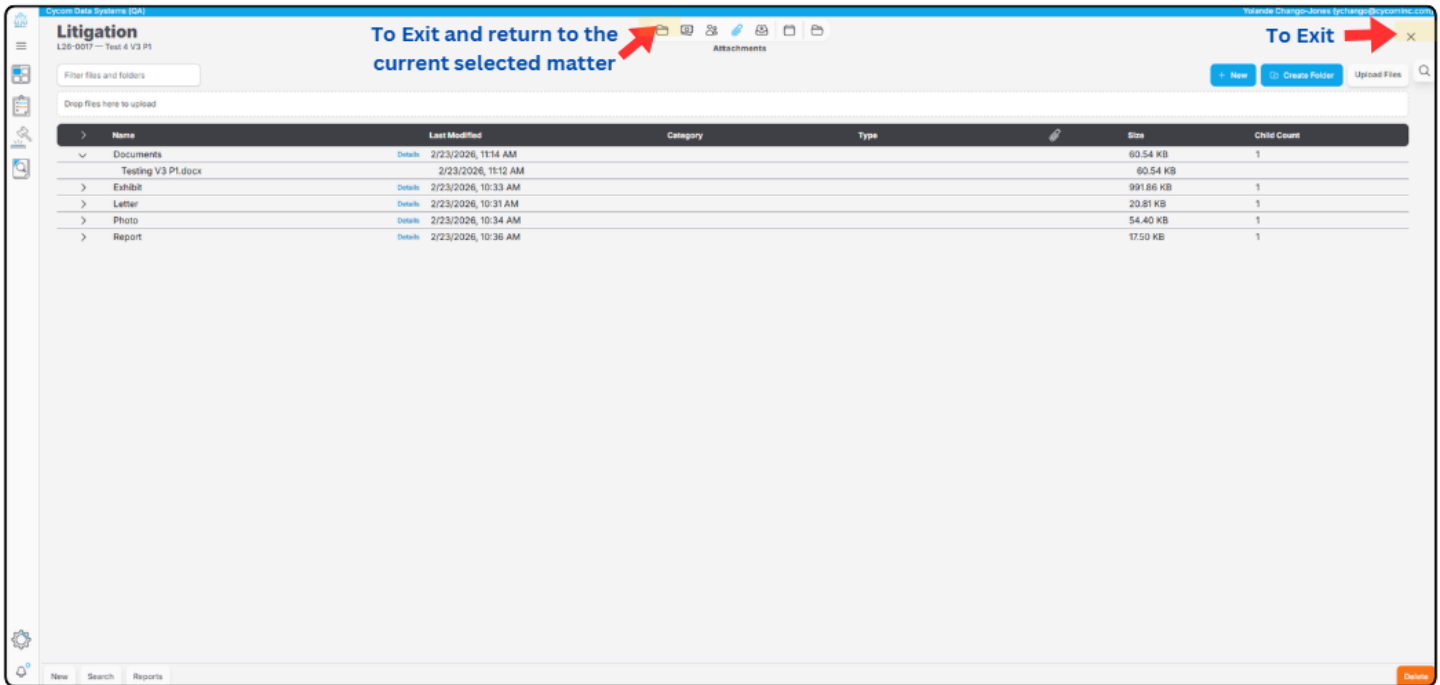
The results will show instantaneously in the table below.



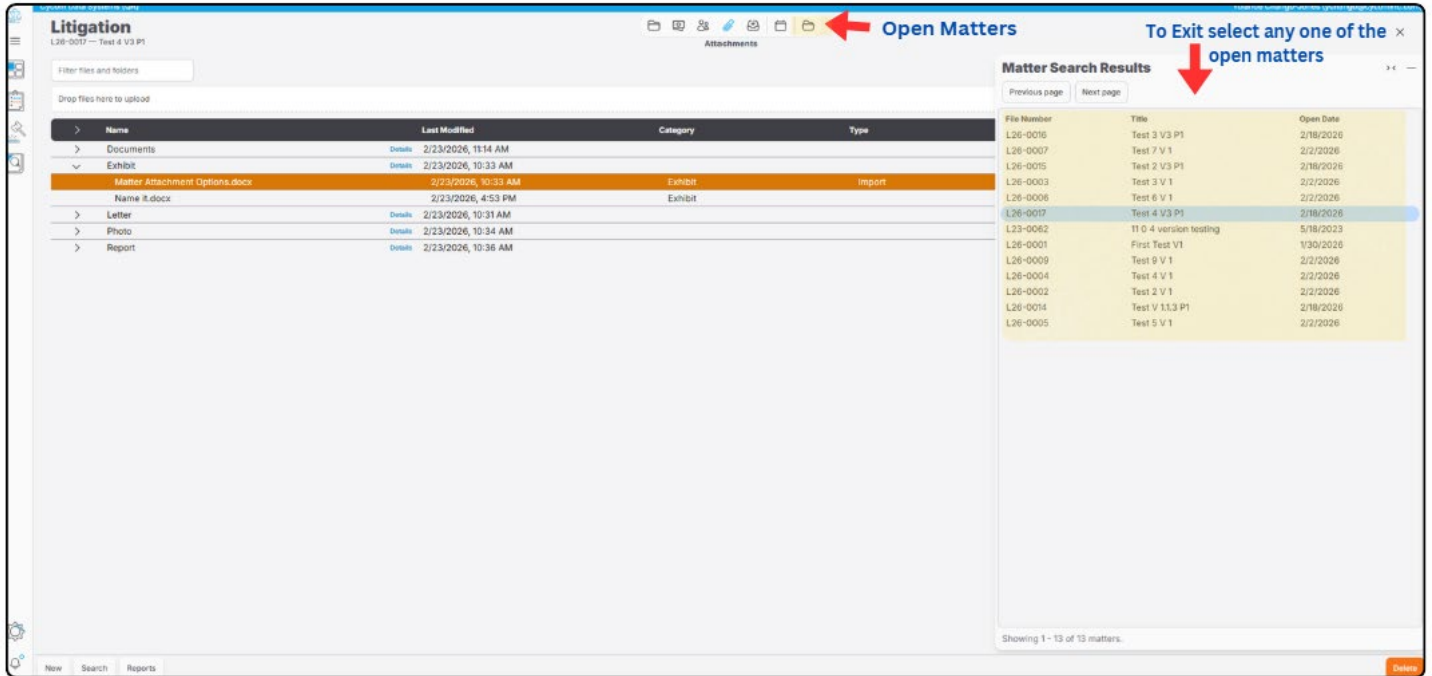
Emailing Files (coming soon)

Exiting the Attachments View

To **exit the Attachments** view, click on the **Overview** icon on the **Module Tool Bar** and return to the current selected matter or click on any **one of the open matters**. You may also exit by clicking on the **X** to the far-right corner of the screen.



CLNG Litigation Matter Attachments Options



The screenshot displays the 'Litigation' interface with the following components:

- Attachments Table:**

Name	Last Modified	Category	Type
Documents	2/23/2026, 11:14 AM		
Exhibit	2/23/2026, 10:33 AM		
Matter Attachment Options.docx	2/23/2026, 10:33 AM	Exhibit	Import
Name 8.docx	2/23/2026, 4:53 PM	Exhibit	
Letter	2/23/2026, 10:31 AM		
Photo	2/23/2026, 10:34 AM		
Report	2/23/2026, 10:36 AM		
- Matter Search Results Table:**

File Number	Title	Open Date
L26-0016	Test 3 V3 P1	2/18/2026
L26-0007	Test 7 V 1	2/2/2026
L26-0005	Test 2 V3 P1	2/18/2026
L26-0003	Test 3 V 1	2/2/2026
L26-0006	Test 6 V 1	2/2/2026
L26-0017	Test 4 V3 P1	2/18/2026
L23-0062	TI 0 4 version testing	5/18/2023
L26-0001	First Test V1	1/30/2026
L26-0009	Test 9 V 1	2/2/2026
L26-0004	Test 4 V 1	2/2/2026
L26-0002	Test 2 V 1	2/2/2026
L26-0014	Test V 11.3 P1	2/18/2026
L26-0005	Test 5 V 1	2/2/2026
- Annotations:**
 - A red arrow points to the 'Open Matters' button in the top navigation bar.
 - A red arrow points to the 'Matter Search Results' header.
 - A red arrow points to the text 'To Exit select any one of the open matters' located above the search results table.

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.