




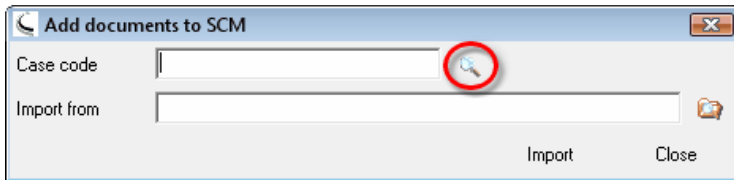
1 How to Use the Add Document to SCM Utility


Within the Case Documents tab you are able to add one document at a time using the **Other** option. However, this help sheet will show you the process of copying multiple Documents from your network drive into the appropriate Case within Solicitor Case Manager using an application stored in the OPSIS Utilities folder.

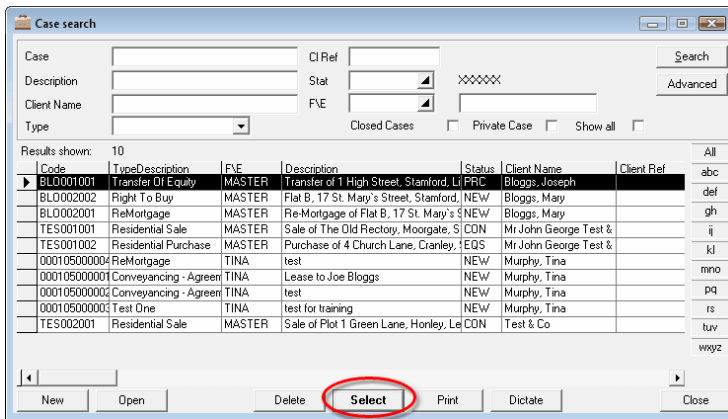
In order for you to copy documents currently on your network drive into Solicitor Case Manager you must have the documents stored in separate folders for each Case or Client as shown in the example below.

Name	Date modified	Type	Size
BLA001001 - Sidney Bland			
BLA001002 - Sidney Bland			
BLO001001 - Joseph Bloggs			

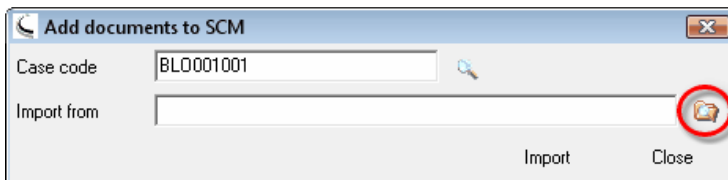
1. Log into **Solicitor Case Manager (SCM)**.
2. Open **My Computer** (windows explorer).
3. Navigate the OPSIS pathway on your network or on the hard drive of your computer.
4. Double click on the  icon, the following screen will appear.



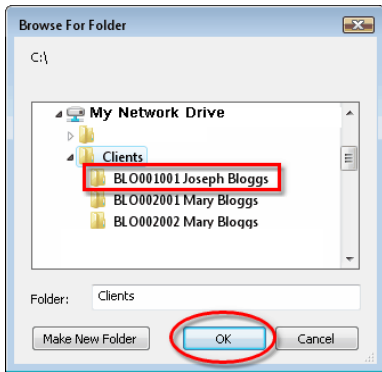
5. Click the  (*search*) button, this will activate the SCM Case search screen.
6. Search for and highlight an appropriate Case.



7. Click the **Select** button, the following screen will appear containing your chosen Case Code.

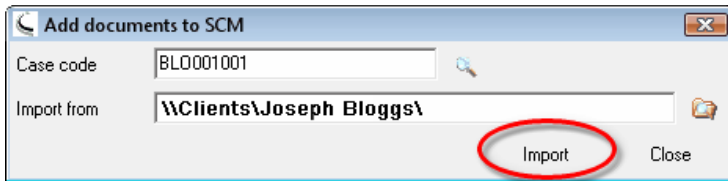


8. Click the  (*browse*) icon in the **Add document to SCM** screen, the following screen will appear.

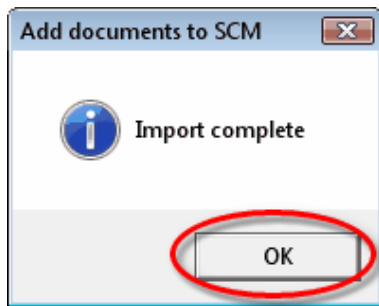


9. Navigate to and highlight the **client folder** for the **Case**.

10. Click the **OK** button - the **Import from** field will be automatically populated.

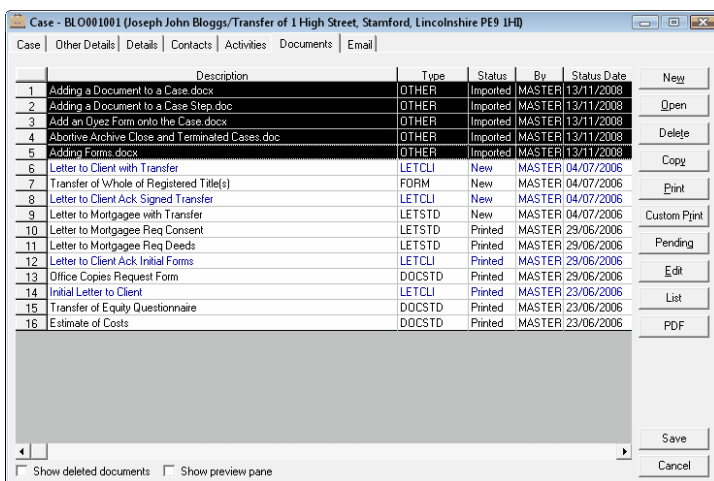


11. Click the **Import** button, the following window will appear when it has finished copying over the documents.



12. Click the **OK** button.

13. Go to the Case in SCM and check the **Documents** tab, the example below highlights the imported **OTHER** documents.



14. Repeat the process from steps 5 to 13 for all other Documents and Cases.



Further assistance can be obtained through the OPSIS Support Desk between 8.30am and 6.00pm on 0844 8155752 or support@opsisltd.com