CMPOnline Imaging

Overview

In CMPOnline, imaging allows for documents, files, and pictures to be saved per case file for easy access. Images can be saved in a number of ways within Case Master. In this session, we will review the three most common: uploading images on the imaging screen directly, imaging documents generated within CMP, and adding images to activity notes.

Uploading Images

1. First, navigate to Case File > Imaging.
2. To add an image, click "Add New".
3. Select an image description, document date, and note if needed.
4. Click within the blue box below to select files you wish to upload from your computer. You are also able to drag and drop images into this area.
5. Click "Upload".

Once uploaded, you can use the grid to view, sort, and export flies as necessary.

Imaging Generated Documents

CMPOnline allows you to image documents directly after generation. For help generating documents, visit our Basic Document Generation Help File or Contact Support.

1. Generate a document.
2. In the document editor, once the document has been generated, click "File".
3. You have two options for sending to imaging, send as a word document (.docx) or as a PDF (.pdf). Click the appropriate "Send to Imaging" button.
4. Select an image description.
5. Click "Save".
6. Move back to Case File > Imaging to ensure the document was imaged. You should see your document with corresponding description and name in the imaging grid.

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Attaching Images to Activity Notes

CMPOnline also allows you to attach images to activity notes, effectively ensuring your firm's staff is able to find any image or document related to the case matter they are working on.

1. Navigate to Case File > Activity.
2. To add a new activity note, click "Add New".
3. Select your Activity Code and fill in any pertinent information necessary.
4. At the bottom of the Add Activity pop-up, you have the option to "Add Existing Image" or "Add New Image".
   a. Click "Add Existing Image" and a dialog box will appear allowing you to search all existing images attached to the current case file. Find the image you wish to add and double click to select.
   b. OR you can click "Add New Image" and a dialog box will appear allowing you to either drag and drop or browse to upload a new image to your current case file using the same instructions above.
5. Save your Activity Note.
6. Now you will see a "View" link next to your new Activity Note in the grid.

Questions?

support@casemasterpro.com
(386) 675-0177