ShareFile Backup Instructions (Case Catalyst)

Before beginning the backup process under either option, it is assumed you have imported your jobs into a briefcase.

Option #1: Backing up a file in Case Catalyst to an external hard drive and then uploading to ShareFile.

- Make sure your external is plugged into your laptop.
- Highlight the briefcase and right click.
- Select "backup".
- Click the drop down arrow on the right hand side in the "Save in" column and choose whatever letter is designated for your external drive.
- Click "Save" in the bottom, right corner. The file should now be on your external drive.
- Minimize or close out of Case Catalyst.
- Go to ocr.sharefile.com
- Log in with your e-mail and password.
- Click on the folder with your name.
- Click on or create a subfolder if necessary.
- Click on the "upload files" button on the right.
- On the next screen, click the "Choose Files" button on the left (make sure your external is still plugged in). Note: If your external drive path doesn't show up, click on the "Start" menu on your computer at your desktop, then choose, computer, then your external drive path.
- Find the job you want to upload, highlight and click "Open" or "Add." Then job should appear in the ShareFile box.
- Then click "upload files" on the bottom left of ShareFile screen. Your files should start to upload.
- Log out of ShareFile when done.

Option #2: Backing up a file from Case Catalyst directly from your computer to ShareFile

- Go to ocr.sharefile.com.
- Log in with your e-mail and password.
- Click on the folder with your name.
- Click on or create a subfolder if necessary.
- Click on the "upload files" button on the right
- On the next screen, click the "Choose Files" button on the left.
- Double click the following:
  - Computer
  - C: drive
  - CAT4
  - Usr
  - Select the folder Catalyst is in
  - Find the file(s) you want to upload to ShareFile and highlight it. (Use the Ctrl + click to highlight more than one file at a time).
  - Hit "save" or "add" and it will appear in your ShareFile box.
- Then click "upload files" on the bottom left of ShareFile screen. Your files should start to upload.
- Log out of ShareFile when done.