

Filing an eBundle

Litigant's Quick Start Guide



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CaseLines is a Netmaster Solutions Ltd product.

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1. Introduction

CaseLines is a highly useful tool for **preparing legal electronic bundles** of any size. CaseLines reduces the time and effort required to prepare legal bundles. CaseLines gives you secure and easy-to-use internet technology to collaboratively produce quality professional legal bundles. You can use CaseLines in two ways:

1. **Self Service:** You load your documents directly into the electronic bundle.
2. **Serviced Bundles:** Our experienced team create the legal bundle for you from the paper and electronic documents that you provide. After we create the legal bundle you review and modify the bundle through a secure internet link.

2. Overview

With CaseLines you create a bundle of documents called a “case”. Once the case has been created you apply pagination, redaction, conduct searches, download it, share it with a colleague, give collaborative access to another party, add late arriving documents with sub-numbering and print for a hearing.

CaseLines is accessible from internet enabled locations including the office, court room and home. This means that litigants and their representatives no longer need to carry paper bundles.

A case contains sections and each section contains documents. Each document receives a descriptive title and date plus other information to identify its place in the final paginated bundle.

3. Self Service

Load documents into CaseLines, collaborate with experts and other parties. Reduce the time, effort and cost to produce the legal bundle.

The documents that you load into each section will often be PDFs produced by scanning paper documents received in your office. They can also be word documents, spreadsheets, emails, web pages and other electronic documents.

Once the documents have been loaded you can update the title and date for each document. CaseLines then produces an automatic bundle index, front page and date ordered set of documents. The final eBundle is “court ready”.

The process is fast and easy, turning jobs that used to take days into hours and reducing team sizes ten-fold.

4. Serviced Bundles

Our experienced team can do the work for you. The results are placed in a secure private cloud where the bundle can be updated by you, shared with counsel, expert witnesses, other parties and used online in the court room or printed in court-ready lever arch folders.

Send us paper and electronic documents. We scan paper, unitize documents, prepare document titles, identify dates for chronological

ordering and help you finalise your electronic bundle. Indexed, ordered, searchable and paginated for web-based collaboration, paperless disclosure, printing or online use in court.

Reduce your bundle preparation workload ten-fold and reduce timescales four-fold (taken from recent bundle building experiences).

5. Using the eBundle

Review the whole bundle in the specialised online review tool, available on iPad, android and all browser enabled devices.

Add notes and comments, annotate the bundle, redact as appropriate and detect duplicate documents.

Add late arriving documents with sub-numbering and disclose electronically. Search the bundle across text, date and titles with multiple word searches and 'sounds like' facilities. All scanned documents receive automatic OCR to make them searchable.



6. Instructions

Registration

1. Go to www.caselines.co.uk
2. Click on **Register** (top right)
3. Fill in your details. Use your work email address when asked.
4. Click on Submit to complete your registration.

Create a Case

1. Go to www.caselines.co.uk
2. Click on **Create New Case** (top left)
3. Click on **Create a blank case**
4. Fill in the name of the case e.g. "R v. James Smith"
5. Scroll down and click on **Create**.

Create a Section

1. Go to www.caselines.co.uk
2. Click on **View Case List** (top middle)
3. Click on **Go To Case**
4. Click on **Sections** (then **Create New Section** if this is your second section)
5. Fill in the Section Number (e.g. "A"), the Section Title (e.g. "Summary") and the Section Order (e.g. "A")
6. Click on **Create**.

Load Documents

1. Go to www.caselines.co.uk
2. Click on **View Case List** (top middle)
3. Click on **Go To Case**

4. Click on **Sections**
5. Click on **Bulk Load**
6. Scroll down and click on **Add Files**
7. Choose the files to load into this section
8. Click on **Start Upload** and wait while the files load.

Update Documents

1. Click on **Sections**
2. Click on **Update All Documents**
3. To change the number, name or date of a document click on the entry and edit the text.

Download the Bundle

1. Click on **Bundle**
2. Under the heading of 'Bundle Parts' click on **Complete Bundle**
3. If you want to download the redacted version of the bundle scroll down to the bottom half of the page under the heading 'Redacted Case Bundle' and click on **Complete Bundle**.

Review the Bundle Online

To quickly review the complete bundle online follow these steps:

1. Go to www.caselines.co.uk
2. Click on **View Case List** (top middle)
3. Click on **Go To Case**
4. Click on **Review**
5. Navigate the bundle using the index on the left and the 'ribbon bar' options at the top.

Give Access to Other Parties

You can give read-only access into the eBundle to other parties. To do this follow these steps:

1. Go to www.caselines.co.uk
2. Click on **View Case List** (top middle)
3. Click on **Go To Case**
4. Click on **People**
5. Click on **Invite New Participant**
6. Enter the name of the other person (e.g. John Smith) and their email address (e.g. john.smith@lawfirm.co.uk)
7. Choose the access options. For read-only access tick 'View Documents' and leave the other boxes unticked
8. Click on **Invite**.

The person you have invited will receive an email with instructions for accessing the eBundle.

Filing the eBundle with the Court

To file the eBundle with the court follow the instructions for giving access to other parties using the name and email address given by the court registry. You will receive an automatic email indicating that access has been given to the court.

Note: you should give the court the ability to invite other people and to update their access rights. This is so that the court registry can invite the judge to view the eBundle.

Accessing the eBundle during the Hearing

The eBundle is electronically accessed during the hearing using one of two methods. These are:

1. Online review web page
2. Offline windows app

The online review page is available in the web browser of all devices including PCs, tablets, iPads and large sized mobile phones. It can be used for navigating the eBundle, adding notes to individual pages and directing others in the hearing to a particular page.

To access the online review page follow these steps:

1. Go to www.caselines.co.uk
2. Click on **View Case List** (top middle)
3. Click on **Go To Case**
4. Click on **Review**
5. View the available options in the 'tool bar' at the top of the page.

The offline windows app is available for Windows 8.1 tablets (search the windows store for 'CaseLines').

Updating the eBundle during the Hearing.

You can add a new document to the eBundle after the pagination has been fixed by inserting it as a 'sub-numbered' document. You can place it at the correct point in the bundle without upsetting the pagination of the eBundle. To do this follow these steps:

1. Load the document(s) as described on page 7.

2. For the newly loaded document(s) tick the third tick box under the heading 'Number as an Insert'.

This will cause the new document to be sub-numbered in the paginated eBundle thus maintaining the current pagination of the eBundle.

A new paginated eBundle will be available a few minutes after this process. It can be accessed through the online review page (see page 8) by clicking on **Case** followed by **Refresh**.

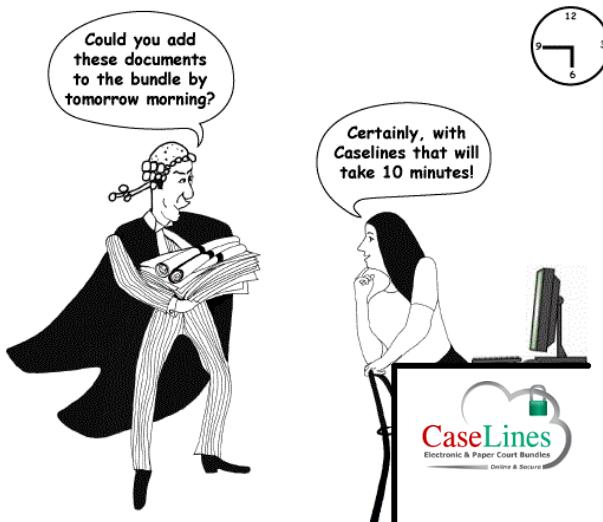
7. Pricing

The cost of using CaseLines starts at 20p per page for self-service usage. For costs associated with serviced bundles please call the number below to discuss your specific requirement.

8. Contact CaseLines

The CaseLines help line is available during UK working hours on 08447 705535. The line only costs 5p per minute and we will always help you finish your task as quickly as possible. Call us when you need help.

Alternatively email us on help@caselines.co.uk



www.caselines.co.uk

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