



ULTIMATE GUIDE TO E-BUNDLE CREATION FOR THE FAMILY DIVISION

The requirements for creating and delivering electronic bundles is changing.
Discover Bundledocs and get compliant today.

www.bundledocs.com

INTRODUCTION

At Bundledocs we want to make e-bundle creation accessible and easy for everyone – after all bundle is in our name! Today Bundledocs is used by professionals in over 36 countries, ranging from large global practices to small firms, to help them produce professional court compliant bundles quickly and easily.

Born in the cloud, from day one we have developed Bundledocs to meet the e-bundling needs of our clients, as well as the various courts requirements and practice directions. With the move from paper bundles to electronic bundles, we have seen several changes to the practice directions and how electronic bundles need to be prepared and presented to court. As Bundledocs is a true cloud solution, we have the agility to quickly adapt to any new changes, ensuring you are **always working with the latest court compliant software**.

One of the most popular use cases for Bundledocs is to help with the creation of e-bundles for the use in courts – especially in the family courts and family division. Recently there has been some changes to the practice directions so we have created this quick guide to outline some of the key features you need to be aware of when producing e-bundles.

In this guide we will cover:

- Anatomy of a bundle: What are the key elements of an electronic bundle.
- Lifecycle of a bundle: What the e-bundle production process looks like.
- E-Bundle Creation: Discover the key requirements and how to create an ebundle from scratch.
- E-Bundle Delivery: How to electronically share the e-bundle with others.

For any Bundledocs users, the good news is **Bundledocs is fully compliant** with the new practice directions, as well as all previous directions. We've even created **pre-set templates** to make it easier for you to create court compliant e-bundles using Bundledocs. So, get in touch with us to get your copy today!

We hope you will find this guide a useful and helpful resource. If you have any queries on anything covered, please reach out to us at info@bundledocs.com and our team will be happy to help.

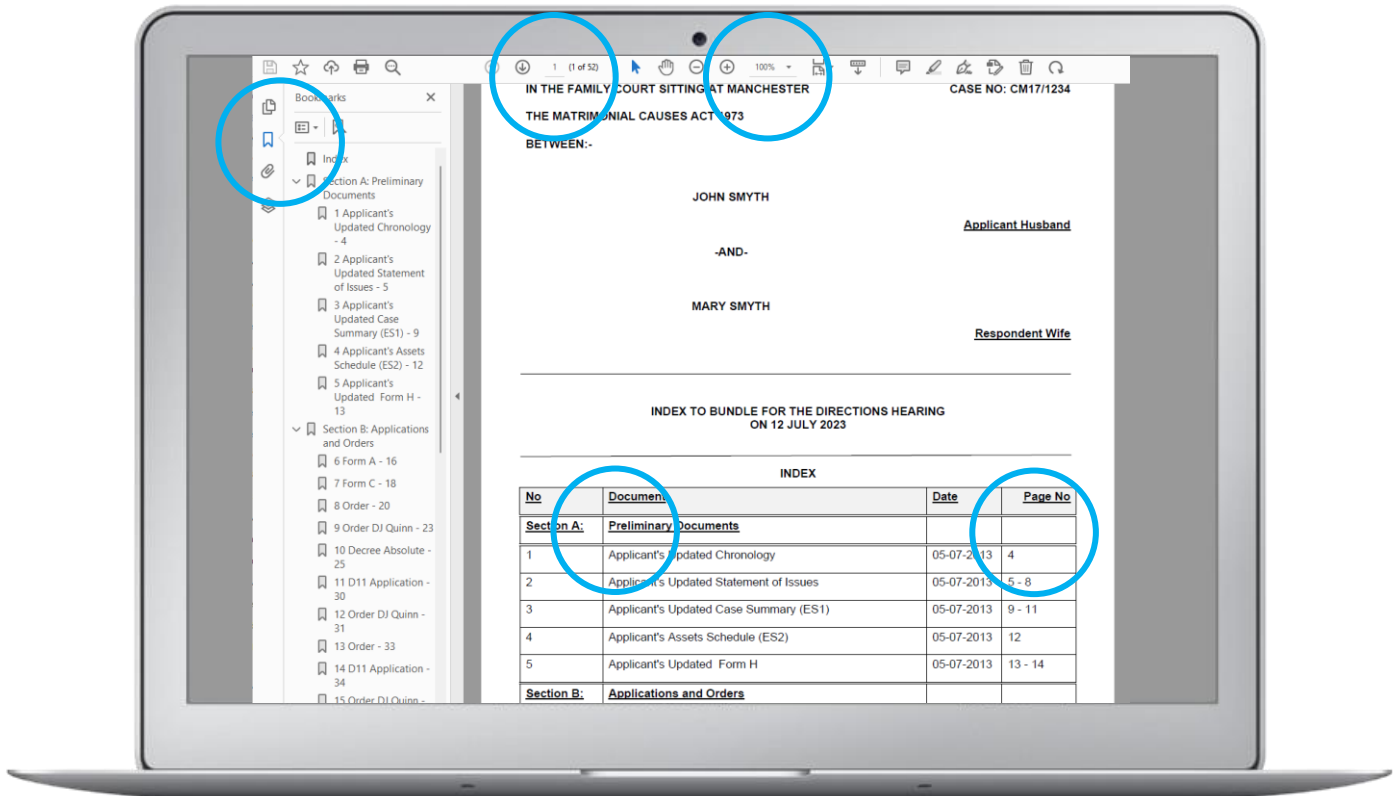
The Bundledocs Team

ANATOMY OF AN E-BUNDLE

There is no doubt that electronic bundles are the way forward. As courts and firms alike make the move away from paper bundles, the practice directions on electronic bundle creation and delivery are continually evolving and changing.

For those that regularly submit e-bundles to court, it is important to keep up to date with latest requirements and customise your bundle to ensure your bundles are fully compliant with the latest practice directions.

Although there are regular updates to the practice directions, the anatomy of the e-bundle does remain consistent so before we jump into how to prepare a bundle, let's first look at the key elements that make up an electronic bundle.



PDF FORMAT

All bundles should be prepared in electronic PDF format. Once complete, the PDF bundle can be easily downloaded, shared electronically, or printed.

DOCUMENT RESOLUTION (DPI)

The document resolution allows you to reduce scanned documents or images dpi to allow for smaller bundles and faster navigation. Setting a DPI rating to 300 dpi or lower, makes significant savings in terms of the size of the bundle.

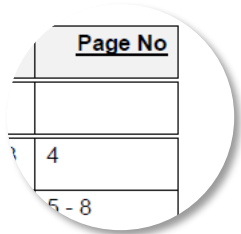
DEFAULT VIEW

In some cases, the courts may specify that you set the default view of your bundle to, for example, 100%. Doing so ensures that when you open your PDF e-bundle, the bundle will automatically open at a view of 100%. This saves the other side, judge and third parties, having to zoom in/out to find this specific viewpoint.



PAGINATION & PAGE NUMBERING

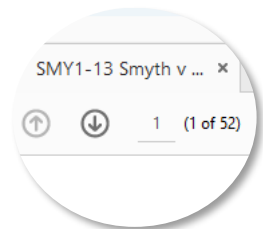
Document pagination is where you apply page numbers to your document pages. With the introduction of electronic bundles, it is best to use software to apply computer generated numbering to ensure it is fully court compliant. Any numbering applied to your document pages should also be reflected on your index page, at the beginning of your bundle.



In some cases, you may be required to apply Bates Numbering to your bundle. Bates numbering differs from traditional page numbering, as it applies a unique number to each document in your bundle.

DIGITAL NUMBERING

Applying digital numbering to your bundle ensures the page / bates number is fully searchable within any PDF viewer. With this you can easily search your e-bundle for any numbering style and the relevant page will instantly appear. For example, type "0-1", "2a" or "3-1" to go to this page.



HYPERLINKED INDEX

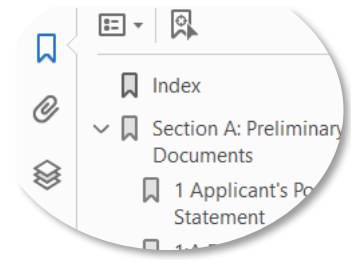
It is important to provide an index at the beginning of your bundle. This will give an overview of the sections and documents in your bundle, as well as the corresponding page numbers.

Each index should be hyperlinked so you can quickly navigate and move to different parts of your bundle. Simply select the section, document, or page number, to go directly to the relevant page.

	<u>Document</u>
<u>Section A:</u>	<u>Preliminary Documents</u>
1	Applicant's Updated Chronology
2	Applicant's Updated Statement
3	Applicant's Updated Case S
	Applicant's Ass

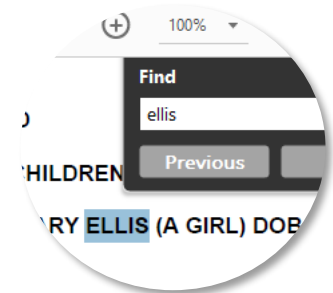
BOOKMARKING

Including bookmarks in your bundle means you can quickly move to different parts of your bundle. In some cases, the court may ask that you have a particular format for your bookmarks, so these should be amended to comply with any specific requirements.



OCR (TEXT SEARCHABLE)

Apply OCR will ensure your bundle is fully text searchable and you can easily search and find specific keywords or sentences in your bundle. Once an e-bundle is OCR'd, you will be able to search and navigate through documents using any PDF viewer. It is particularly important to OCR images or document scans, to ensure they are text searchable in your completed e-bundle.



SECTIONS

Most practice directions ask that you create relevant sections for your bundle, to help organise court documents. All sections and documents will be viewable and accessible from the index page of your e-bundle.

A circular inset showing a table of contents. The table has two columns: 'Section A:' and 'Document'. The first row is the header. The second row is '1 Applicant's Updated Chronology'. The third row is '2 Applicant's Updated Statement'. The fourth row is '3 Applicant's Updated Case S'. The fifth row is 'Applicant's Asses'.

DELIVERY

Delivering electronic bundles is now a big part of the e-bundle process. After all, what's the use of creating the perfect court-compliant bundle if you can't share it with the courts/others.

Depending on the court, there may be specific requirements for e-bundle delivery so it's worth reviewing the practice directions and checking with the courts directly. Options can include sending electronically via a secure downloadable link, sending via email, or uploading directly to the court system.

LIFECYCLE OF AN E-BUNDLE

There is more to creating a bundle than merging documents together with an index and pagination. The process of producing electronic bundles involves key areas from creation to updates to delivery.

Throughout the lifecycle of a bundle there are many changes that may need to be made. In most cases you will start with the relevant documents. Then as it progresses you will gradually need to do more with the bundle, from editing/adding/removing documents, arranging in order, customising as per court requirements, and finally delivering. Then in some cases, there may need to be further changes needed once the bundle has been completed and so on.

For us here at Bundledocs, it is important that we developed everything you need to prepare, edit and deliver your electronic bundle in one place, so our users wouldn't need to purchase any additional software.

For example, at the beginning our users create a workspace to store case documents. Within this area they can edit and manipulate documents, apply annotations and redactions, form fill and work collaboratively with our team, outside counsel, clients and other third parties. Then when it's ready to complete, we can download the final version or securely share with others or the courts. Even better, if any changes are needed, with a single button they can re-generate the bundle and time consuming tasks such as pagination, index creation, hyperlinking and bookmarking are automatically updated for you. Simple!

In recent years the requirements and expectations for e-bundles have changed, so it's worth investing in new technologies to make this process easier for your teams. Regardless of the solution you choose, it is important that your e-bundle software has the flexibility to adjust to the changes that are needed during the bundle process.

CREATE YOUR E-BUNDLE WORKSPACE

Now that we've looked at the key elements that constitute an e-bundle and an overview of the e-bundle lifecycle, let's jump right in and look at how to create an electronic bundle using Bundledocs.

In Bundledocs, there are 5 steps to the creation and delivery of bundles.

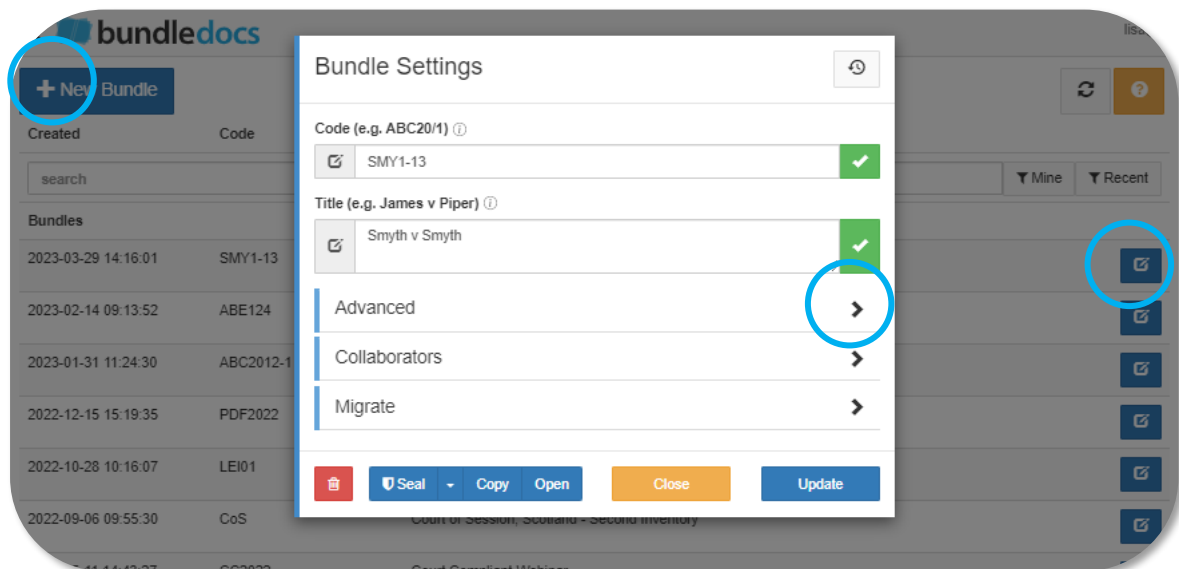
1. **Create a Workspace - We will start here!**
2. Create Sections
3. Add Documents
4. Generate & Customise
5. Distribute & Share

Note: Please ensure you review the relevant practice directions to keep up to date with the latest requirements for creating and delivering electronic bundles to court.

Requirements

- ✓ **PDF Format** – E-bundles must be provided in pdf format.
- ✓ **Default View** – The default view for all pages should be 100%.
- ✓ **Resolution** – The resolution of the bundle should not be greater than 300 dpi, in order to avoid slow scrolling or rendering. The bundle should be electronically optimised so as to ensure that the file size is not larger than necessary.

How It Works Using Bundledocs



1. Select 'New Bundle' and provide a Code and Title to create your workspace.
2. Once your bundle is created, select Edit Bundle and expand the 'Advanced' section.
3. Then apply the following settings:
 - a. Choose to show document date on screen.
 - b. Set the Zoom Level to 100%.
 - c. Choose to apply content optimisation on upload and set to 300 DPI.
 - d. Choose to apply source orientation on upload.
 - e. Choose to apply OCR on upload.
4. Once these options are selected, select 'Update' to complete.

Note: Remember, we've created **pre-set templates** to make this process easier for you. These templates will automatically include all these settings and everything you need to create a court compliant e-bundle. Get in touch with our team to download your free template today.

It Gets Better...

- ♥ **Document Dates** - Opt to include document dates on screen so you can easily sort documents in chronological order with the click of a button. **See it in action.**
- ♥ **Resolution** - With Bundledocs you have the option to reduce scanned documents or images dpi to allow for smaller bundles and faster navigation with Bundledocs Content Optimisation feature. DPI ratings can be reduced to between 200 and 300 dpi, making significant savings in terms of the size of the bundle. With Bundledocs, you can choose the resolution. **See it in action.**

Interested to learn more?

Looking for a solution to help you prepare court compliant family e-bundles, Bundledocs has got you covered. Get in touch to access your free template today!

FREE TEMPLATE



ADD SECTIONS

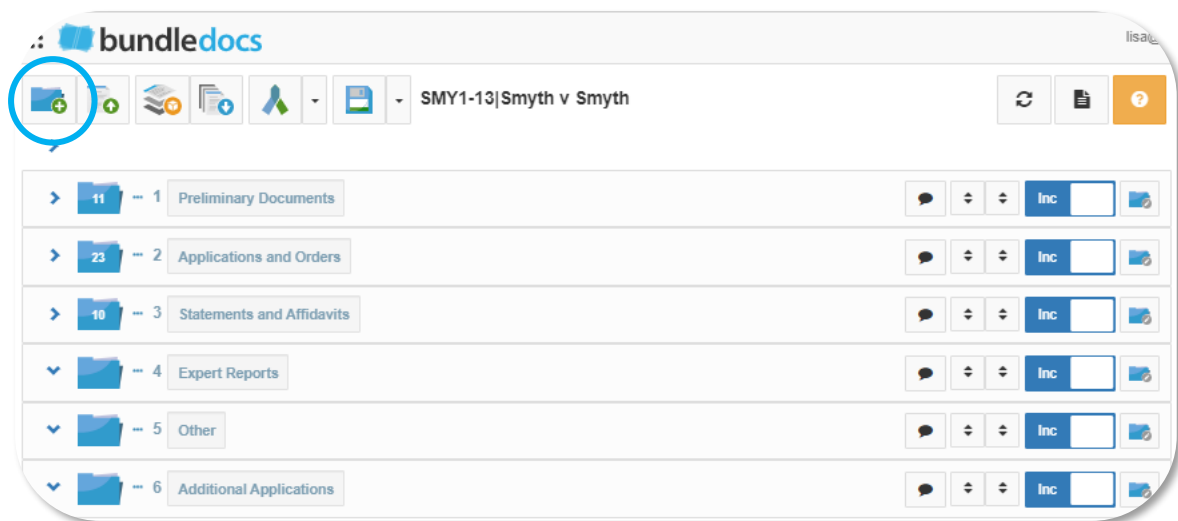
Now we've created our workspace, let's move on to the 2nd step:

1. Create a Workspace
- 2. Create Sections**
3. Add Documents
4. Generate & Customise
5. Distribute & Share

Requirements

- ✓ **Bookmarks**– All significant documents and all sections in bundles must be bookmarked for ease of navigation, with a short description as the bookmark.
- ✓ **Late Inserts** - If a bundle is to be added to after it has been transmitted to the judge, then new pages should be added at the end of the bundle (and paginated accordingly). An enquiry should be made of the court as to the best way of providing the additional material. Subject to any different direction, the judge should be provided with both (a) the new section and, separately, (b) the revised bundle. This is because the judge may have already marked up the original bundle.
- ✓ **Bundle Limit** - Specifically, an e-bundle may only exceed the default limit of 350 pages provided by PD 27A para 5.1 with the court's permission.
- ✓ **Chronological Order** - The documents in the bundle shall be arranged in chronological order from the front of the bundle, paginated individually and consecutively (starting with page 1 and using Arabic numbering throughout), indexed and divided into separate sections (each section being separately paginated) ...'

How It Works Using Bundledocs



1. Select to create sections for your e-bundle
 - a. If you need to re-name any section, simply double click and rename.
 - b. If you need to re-arrange this can be done by dragging and dropping.

It Gets Better...

- ♥ **No Limitations** - No limit to the number of sections or sub-sections in your bundle.
- ♥ **Templates** - Bundledocs templates can help save time when preparing bundles. By using templates, it will automatically pull in any predefined settings, styles and customisations to help save time when creating bundles. This includes options to lock template settings, set default templates for your own account or for multiple user accounts etc.

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FREE TEMPLATE



ADD & WORK WITH CASE DOCUMENTS

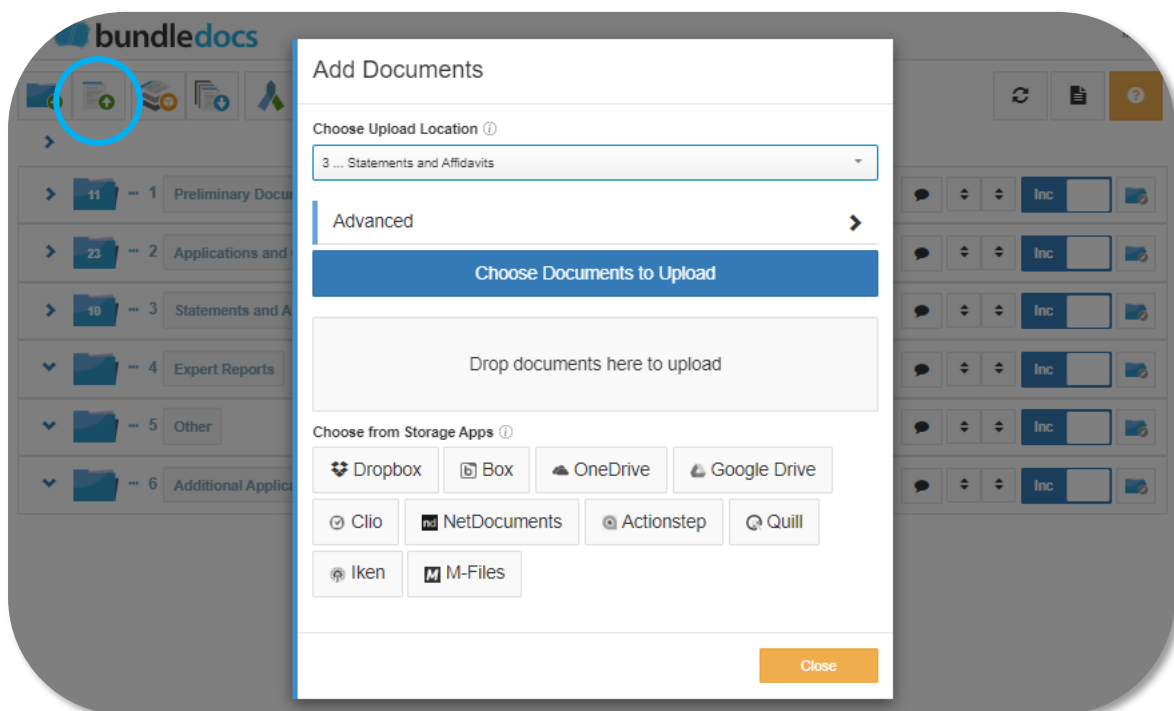
Now we've created the sections for our workspace, let's move on to the 3rd step:

1. Create a Workspace
2. Create Sections
- 3. Add Documents**
4. Generate & Customise
5. Distribute & Share

Requirements

- ✓ **Landscape Pages**– Any page that has been created in landscape orientation should appear in that orientation so that it can be read from left to right. No page should appear upside down.
- ✓ **Mark Key Documents with an Asterix** - Rather than producing a core e-bundle a better method for identifying key documents, more conformable with the continuous pagination rule, is to mark them in the index with an asterisk (or to list them in a separate hyperlinked list of essential reading placed behind the index).

How It Works Using Bundledocs



1. Click here to upload documents into your bundle. There are a few ways you can upload documents to Bundledocs. For example, you can upload from your desktop or through one of our many integrations with a case/document management system. For more information on integrations with Bundledocs, please get in touch with support@bundledocs.com.
 - a. If you need to re-name any document, simple double click and rename.

It Gets Better...

- ♥ **Form Filling:** Bundledocs has a built-in suite of editing and document manipulation features. This includes the ability to form fill uploaded documents. This works great if you need to complete 'Form E' documents.
- ♥ **Redaction:** Bundledocs offers in-built redaction tool. Redaction allows you to completely remove sensitive information from your bundle and is fully customisable. As your bundle is fully text searchable, you have the ability to redact all or multiple instances of a term/phrase at once. Even apply bulk redactions if needed. **See it in action.**
- ♥ **Annotations:** Bundledocs offers a suite of annotation tools including the ability to add comments/notes, highlights, document reference links, labels, and signatures. **See it in action.**
- ♥ **Split Documents:** With Bundledocs in-built editing tools you can easily split documents and complete bundles. Simply specify or choose how you would like your document split. Bundledocs will create individual PDF files, based on your specifications. This is particularly beneficial for clients that scan large amounts of documents. **See it in action.**
- ♥ **Re-name Documents:** Easily re-name documents with the click on a button. Even add an asterisk for any important documents that you want to mark in your index.

Interested to learn more?

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FREE TEMPLATE



GENERATE & CUSTOMISE YOUR E-BUNDLE

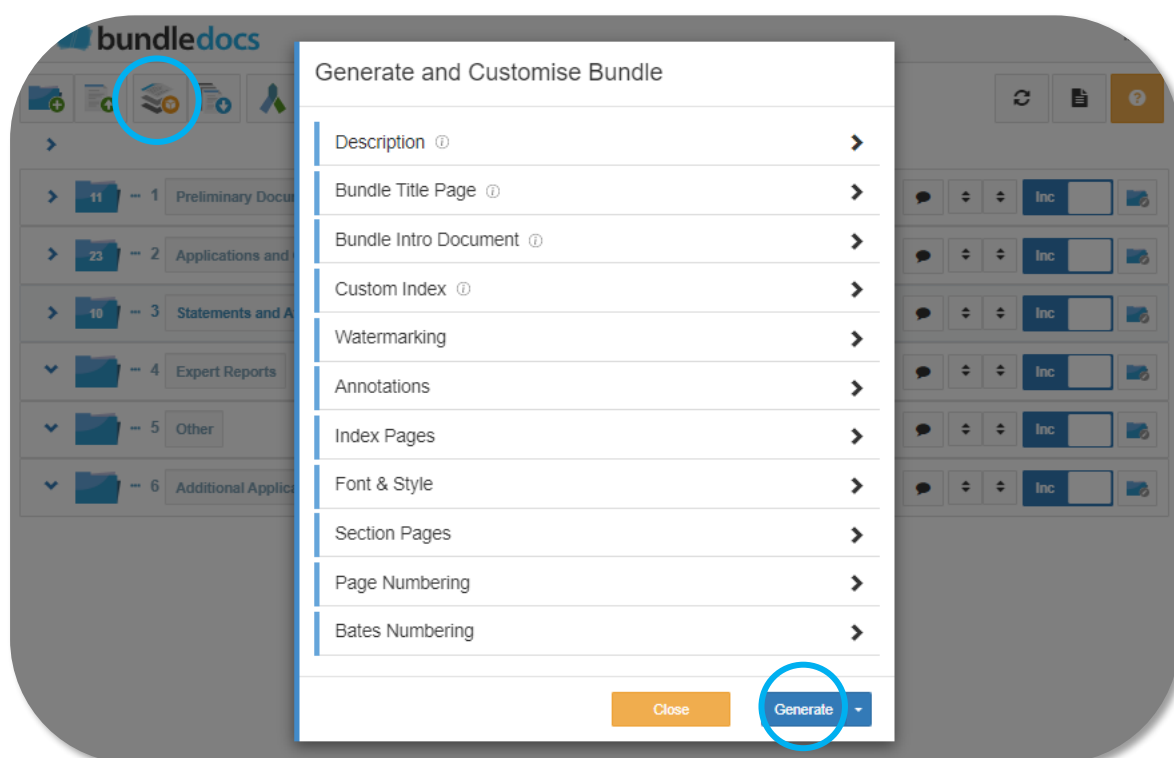
Now we've added our documents, let's move on to the 4th step:

1. Create a Workspace
2. Create Sections
3. Add Documents
- 4. Generate & Customise**
5. Distribute & Share

Requirements

- ✓ **Filename** - The filename for a bundle must contain the case reference and a short version of the name of the case and an indication of the content of the bundle – eg “CO12342021 Carpenters v Adventurers Hearing Bundle” or “CO12342021 Carpenters v Adventurers Authorities Bundle”.
- ✓ **Hyperlinked Index** - Each entry in the index must be hyperlinked to the indexed document.
- ✓ **Bookmarks** - All significant documents and all sections in bundles must be bookmarked for ease of navigation, with a short description as the bookmark. The bookmark should contain the page number of the document.
- ✓ **Numbering** - All pages in an e-bundle must be numbered by computer-generated numbering, not by hand. The numbering should start at page 1 for the first page of the bundle (whether or not that is part of an index) and the numbering must follow sequentially to the last page of the bundle, so that the pagination matches the pdf numbering. If a hard copy of the bundle is produced, the pagination must match the e-bundle.
- ✓ **Numbering** - Para 2 of the general guidance is temporarily suspended in public law children proceedings. During the period of suspension further enquiries will be undertaken to examine the operational and resource consequences of the general guidance to local authorities and those representing respondents in public law proceedings. A working group comprising of representatives from the Judiciary, the FLBA and the ALC has been established to examine the issues and make recommendations.

How It Works Using Bundledocs



1. To produce our bundle, it must first be 'Generated'. Generating your bundle helps you to customise how you want your bundle to appear. You can generate the bundle as many times as needed. In our example, we will be producing a simple bundle, so we will not be making any additional changes.

It Gets Better...

- ♥ **Index Automation** - Bundledocs automatically creates the index for you. It is even fully customisable so can be amended to suit any requirement.
- ♥ **Hyperlinking Automation** - Bundledocs automatically hyperlinks the index. If any changes are needed to your bundle, simply re-generate and Bundledocs will automatically handle any changes made and re-index and re-hyperlink the entire bundle.
- ♥ **Bookmark Automation** - Bundledocs automatically bookmarks your bundle This is fully customisable so can be amended to suit any requirement.
- ♥ **Pagination / Bates Numbering Automation** - Bundledocs can handle any pagination, including bates numbering and working with late insert documents. All pagination is fully customisable and if any changes are made to the bundle, the numbering is automatically updated for you.

Interested to learn more?

Looking for a solution to help you prepare court compliant family e-bundles, Bundledocs has got you covered. [Get in touch](#) to access your free template today!

ELECTRONIC BUNDLE DELIVERY

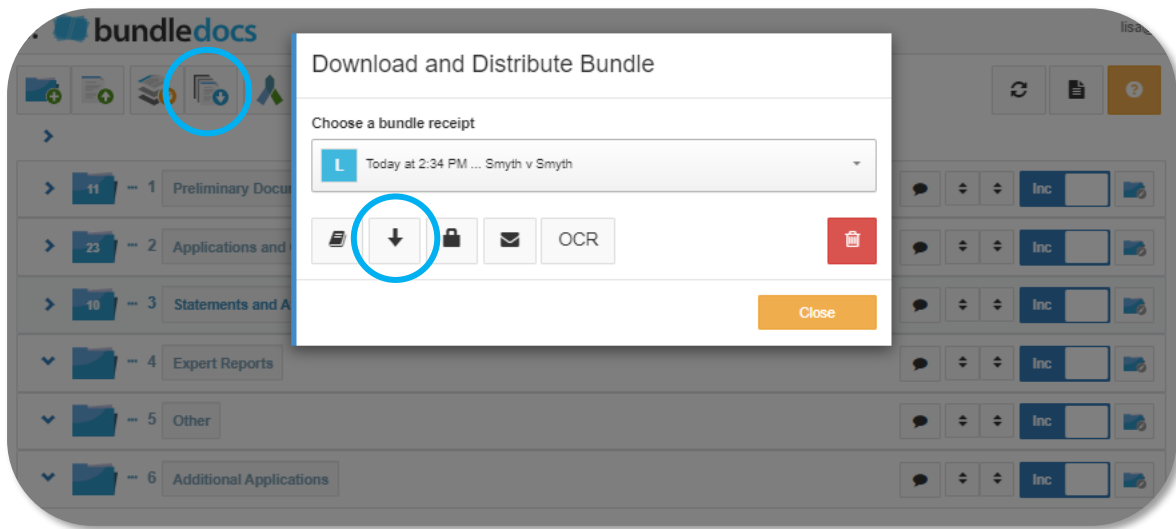
Now we've generated our bundle, let's move onto the 5th and final step:

1. Create a Workspace
2. Create Sections
3. Add Documents
4. Generate & Customise
5. **Distribute & Share**

Requirements

- ✓ **OCR** - All pages in an e-bundle that contain typed text must be subject to OCR (optical character recognition) if they have not been created directly as electronic text documents. This makes it easier to search for text, to highlight parts of a page, and to copy text from the bundle.
- ✓ **Core Bundle** - If a core bundle is required, then a PDF core bundle should be produced complying with the same requirements as a paper bundle.
- ✓ **Number of Bundles** - Thought should be given to the number of bundles required. It is usually better to have a single hearing e-bundle and (where appropriate) a separate single authorities e-bundle (compiled in accordance with these requirements), rather than multiple bundles (and follow any applicable court specific guidance – see eg CPR PD52C Section VII).
- ✓ **Delivering by Email** - If the bundle is to be sent by email, please ensure the file size is not too large. For justice.gov e-mail addresses the maximum size of email and attachments is 36Mb in aggregate. Anything larger will be rejected. The subject line of the email should contain the case number, short form case name, hearing date and name of judge (if known).
- ✓ **Delivering by Uploading** - Bundles should be sent to the court in accordance with the court's directions. Where the bundle would otherwise be sent by email (rather than being uploaded to a portal) but is too large to be sent under cover of a single email then it may be sent to the Document Upload Centre by prior arrangement with the court – for instructions see the Professional Users Guide (opens in a new tab).

How It Works Using Bundledocs



1. Once your bundle has been generated it is ready to download. Bundledocs automatically emails the completed bundle to you, however, you can also access the bundle within your account by selecting the 'Download' button. All bundles can be downloaded at any time and as many times as you need.

It Gets Better...

- ♥ **Securely Share from Bundledocs** - Bundledocs Secure Share (also known as, Forward Bundle to Third Party) allows you to share bundles created in Bundledocs securely with any third party. Bundledocs users have full visibility on the status of the file i.e. send, receive and download notifications. **See it in action.**
- ♥ **Securely Share via Outlook** - Bundledocs Secure Share with Outlook allows you to share bundles created in Bundledocs with any third party. Although our clients mostly use Microsoft Outlook as their email provider, if you use alternative email software, it will work with this too. Using this method, you can create a secure encrypted hyperlink in Bundledocs and add this directly to your email. This is great as it allows you to send large bundles to others from your own email address. **See it in action.**

Interested to learn more?

Looking for a solution to help you prepare court compliant family e-bundles, Bundledocs has got you covered. Get in touch to access your free template today!

FREE TEMPLATE



ACCESS YOUR FREE TEMPLATES

Thanks for taking the time to read our, *Ultimate Guide to E-Bundle Creation for the Family Division*. We hope you have a better idea of the key elements to keep in mind when preparing your e-bundles for court.

We want to help make the process of creating court compliant e-bundles easier for anyone who is creating and submitting family bundles to court. That's why we've created a FREE pre-set e-bundle template that is fully compliant with the latest practice directions.

Ready to get started? Request a court compliant template from us now and we will unlock a FREE 30-day trial of Bundledocs so you can fully test it out and see how simple e-bundle creation really is.

As there are some unique requirements for those submitting e-bundles for care proceedings, we have created a separate pre-set template that is fully compliant with all the latest requirements. So, request a copy today!



Family E-Bundle



Need to prepare e-bundles for family law cases? We've prepared pre-set template that fully comply the new guidance. Get your FREE template today.

REQUEST A FREE COPY ►



Public Law E-Bundle



Need to prepare e-bundles in public law cases? We've prepared pre-set template that fully comply the new guidance for use in care proceedings. Get started today.

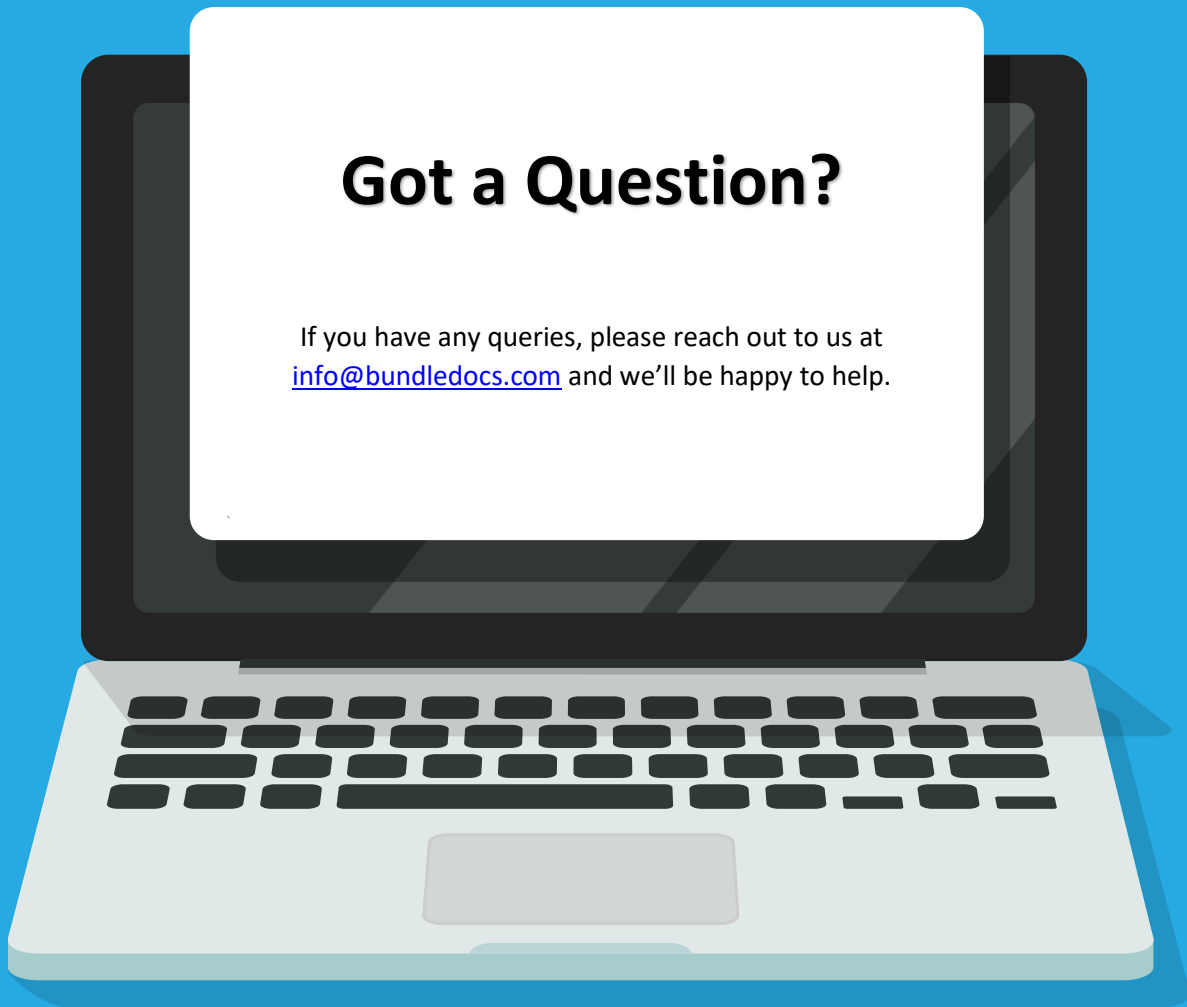
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We hope you will find this guide a useful and helpful resource. If you have any queries on anything covered, please reach out to us at info@bundledocs.com and our team will be happy to help.

The Bundledocs Team

Got a Question?

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