

MANAGE THE INDEX AND UPLOAD DOCUMENTS

MANAGE THE STRUCTURE AND EVIDENCE WITHIN THE DIGITAL CASE FILE

Often you may need to restructure the evidence bundle and add in or edit sections within the bundle. You can do this from both the **Index** and **Sections** areas on the DCS.



Editing the structure of the case will change the structure and the page numbers for all users. Therefore this should only be carried out for good reason.

MANAGING THE INDEX

Click the **Index** button.

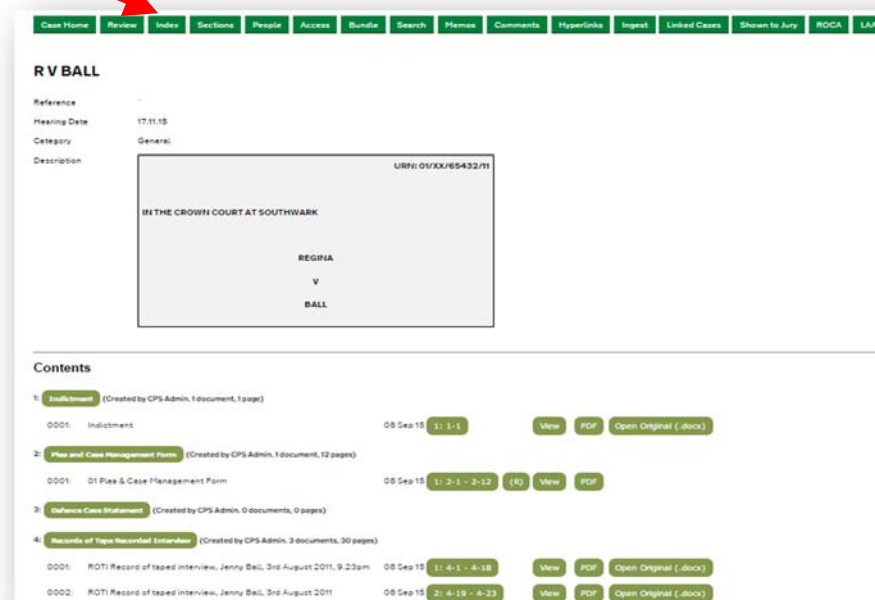
Within this area are reference details for the case, including a preview of the Front Page.

Below is the **Content** of the bundle, separated into sections.

Within the sections are all the documents that make up the evidence bundle.

Click on one of the lettered Sections to be taken to a separate page to interact with the documents within that section.

In the Section are a number of tools to use, listed below the name of the case.



The screenshot shows the CaseLines interface for case R V BALL. A red arrow points to the 'Index' button in the top navigation bar. The main content area displays case details: Reference, Hearing Date (17.11.15), Category (General), and Description (IN THE CROWN COURT AT SOUTHWARK, REGINA v BALL). Below this is a 'Contents' section listing documents with their creation dates, page counts, and actions like 'View', 'PDF', and 'Open Original (.docx)'. The documents listed are:

- 1: Indictment (Created by CPS Admin, 1 document, 1 page) - 08 Sep 15 - 1: 1-1
- 2: Plea and Case Management Form (Created by CPS Admin, 1 document, 12 pages) - 08 Sep 15 - 1: 2-1 - 2-12
- 3: Defence Case Statement (Created by CPS Admin, 0 documents, 0 pages)
- 4: Records of Taped Recorded Interviews (Created by CPS Admin, 3 documents, 30 pages)
 - 0001: ROT1 Record of taped interview, Jenny Ball, 3rd August 2011, 9.23am - 08 Sep 15 - 1: 4-1 - 4-18
 - 0002: ROT1 Record of taped interview, Jenny Ball, 3rd August 2011 - 08 Sep 15 - 2: 4-19 - 4-23

UPLOADING DOCUMENTS

Upload Document(s) allows users to manually add documents and evidence straight into the Digital Case File, into a specific section. The upload tool becomes available when clicking into a section.

This allows other parties to view the documents quickly and easily.

i When uploading documents to a Digital Case File, all users with access to that section within the case will receive a notification via the bell informing them that new documents have been added. If a section is restricted, or has defence access restrictions, only the people who have access to the section will receive a notification. See QRG: Notifications.

The bulk loader allows users to add single or multiple documents into a section. To do this:

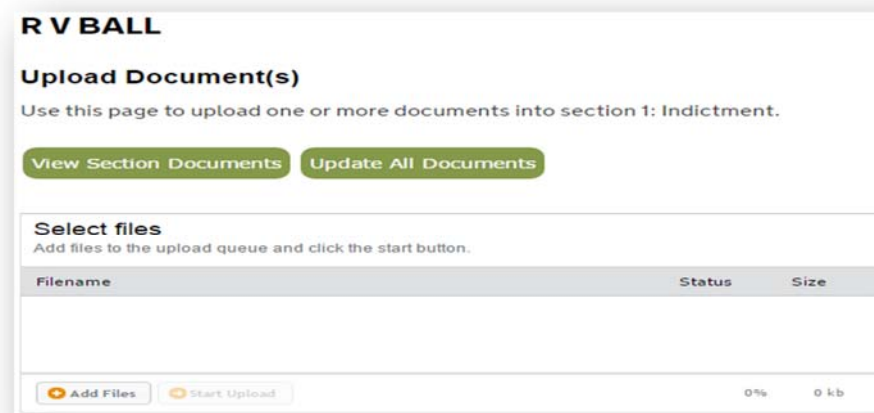
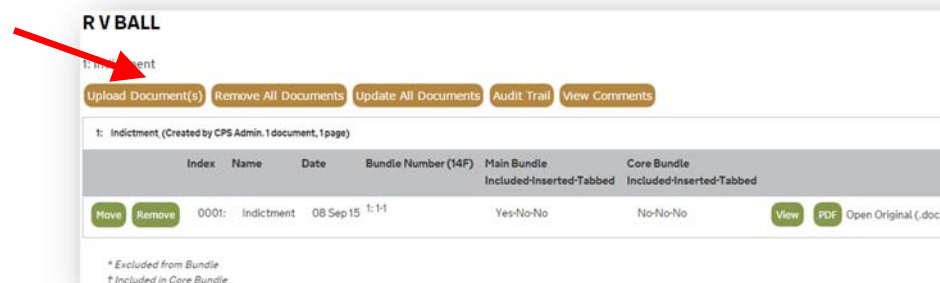
1. Click the **Add Files** button
2. Locate and select the relevant files on your computer or device.
3. Click **Open**

Click **Start Upload** to add the selected files.

You can upload many different file types including but not limited to:

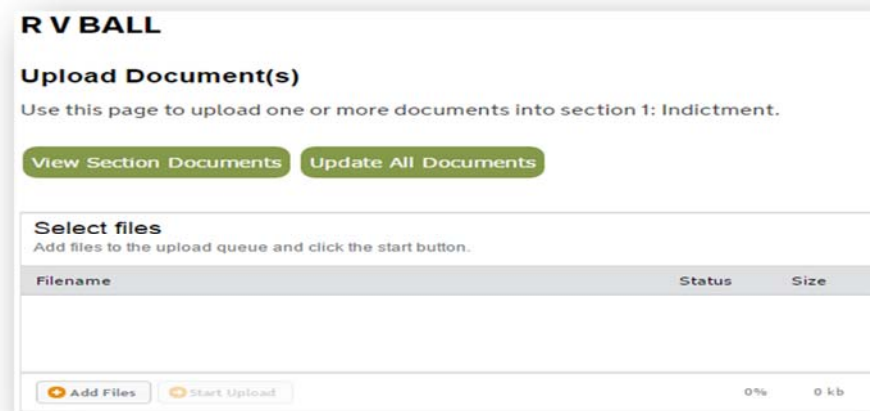
- PDFs
- Word documents
- Excel files
- Images
- PowerPoint presentations

i All uploaded documents will be presented in the bundle in PDF form. Access to the original file type can be found within the **Bundle** area.



QRG: Manage the Index and Upload Documents

- During uploads users can see the status of the upload.
- The speed is dependent on the speed of the internet connection.
- There are no set limits on the sizes of the files which can be uploaded.
- Uploads may be cancelled by clicking the **Cancel** button.
- Click **View Section Documents** to go back into the section.



R V BALL

Upload Document(s)

Use this page to upload one or more documents into section 1: Indictment.

[View Section Documents](#) [Update All Documents](#)

Select files
Add files to the upload queue and click the start button.

Filename	Status	Size
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[Add Files](#) [Start Upload](#) 0% 0 kb

UPLOADING TO A SECTION WITH DEFENCE ACCESS RESTRICTIONS

If the section you are uploading to has defence access restrictions (sections C, D, M, N, Q, T, U, V & PD) you will be required to indicate which defendant(s) should have access to the document.

Only defence users associated with defendants who have been granted access the document will be able to see it.

Defence users not users associated with defendants who have been granted access the document will not be able to view the document, nor will they be able to see the existence of the document in the index or ROCA, nor will they be able to see any notes attached to the document.

1. The Defendants that are linked to this case will be listed,
2. Select the defendants that are related to the document (s) that you are uploading but putting a tick in the relevant tick box.
3. Click Start Upload in the usual way

For cases with only one defendant, the tick box will be ticked by default.

Access must be granted to at least one defendant: if you attempt to upload a document to one of these sections without associating a defendant, you will see an error message.

Upload Document(s)

Use this page to upload one or more documents into section C: Basis of Plea.

View Section Documents
Update All Documents

Destroyer,Drax,1/4/2000
 Quill,Peter,1/11/1980

⚠ Defendant selection is mandatory for this section, please select a defendant from the list above. ✕

Filename	Status	Size
0001 Trade Union and Labour Relations(Consolidation) Act 1992.pdf	0%	215 kb +

Drag files here.

+ 1 files queued
Start Upload

0% 215 kb

EDITING DOCUMENT ACCESS PERMISSIONS

When you view the list of documents in a section with defence access restrictions, either by navigating to the **Section** screen and clicking on **View Documents** or by navigating to the **Index** screen and clicking on the section title, you can amend the access to a particular document.

This is done by clicking on the **Edit Access** button. This button will be only be available if you have the same role* as the user who originally uploaded the document.

*Same role in the case of a defence user is one associated with the same defendant.

This will show the current Defendants in the case, and which ones have been granted access to this particular document. Amend the ticks next to the required Defendant and click on the **Save and close** button.

N: Pre Cons

Upload Document(s) Remove All Documents Update All Documents Audit Trail View Comments

N: Pre Cons, (Created by HMCTS Admin. 2 documents, 15 pages)

Index	Name	Date	Bundle Number (31F)	Main Bundle Included-Inserted-Tabbed	Core Bundle Included-Inserted-Tabbed	Defence Restrictions
0001	Previous Convictions - Kanobi	09 Oct 17	1: N1 - N11	Yes-No-No	No-No-No	<input type="checkbox"/> Edit Access <input type="button" value="View"/> <input type="button" value="PDF"/>
0002	Previous Convictions - Skywalker	09 Oct 17	2: N12 - N15	Yes-No-No	No-No-No	<input type="checkbox"/> Edit Access <input type="button" value="View"/> <input type="button" value="PDF"/>

✕

One Defendant 1 - 01.01.70

Two Defendant 2 - 04.02.59

Save and close

INDEX STATUS ICONS




When a document is loaded, an icon to the left of the Index displays its processing state.

For documents uploaded prior to the introduction of the processing icons, creating a fresh bundle using the *New Bundle* button will re-process all documents (see QRG12 - Download an offline copy of the index and bundle).

G: Key Witness Statements (Created by HMCTS Admin, 8 documents, 21 pages)			
0001:	Adam APPLE	09 Jan 18	1: G1 - G3 View PDF
0002:	Adam APPLE	09 Jan 18	2: G4 - G8 View PDF
0003:	Bob BANANA	09 Jan 18	3: G9 - G10 View PDF
0004:	Caroline CARROTT	09 Jan 18	4: G11 - G12 View PDF
0005:	Cyril CAULIFLOWER	09 Jan 18	5: G13 - G14 View PDF

There are three processing states:

- Busy processing
- Successfully processed
- Failed to process

Busy processing		0001:	Adam APPLE
Successfully processed		0001:	Adam APPLE
Failed to process		0001:	Adam APPLE

A document may fail to process if it is of an unsupported file type, is corrupt, is password protected, or is potentially harmful (contains a virus or executable).

Where a document fails to process, DCS will replace the document in the bundle with a placeholder and inform the uploading user by email.

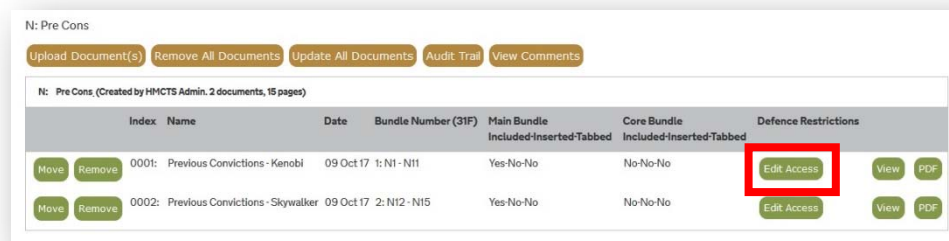
EDITING DOCUMENT ACCESS PERMISSIONS

When you view the list of documents in a section with defence access restrictions, either by navigating to the **Section** screen and clicking on **View Documents** or by navigating to the **Index** screen and clicking on the section title, you can amend the access to a particular document.


This is done by clicking on the **Edit Access** button. This button will be only be available if you have the same role* as the user who originally uploaded the document.

*Same role in the case of a defence user is one associated with the same defendant.

This will show the current Defendants in the case, and which ones have been granted access to this particular document. Amend the ticks next to the required Defendant and click on the **Save and close** button.



Index	Name	Date	Bundle Number (31F)	Main Bundle Included-Inserted-Tabbed	Core Bundle Included-Inserted-Tabbed	Defence Restrictions
0001	Previous Convictions - Kenobi	09 Oct 17	1: N1 - N11	Yes-No-No	No-No-No	Edit Access View PDF
0002	Previous Convictions - Skywalker	09 Oct 17	2: N12 - N15	Yes-No-No	No-No-No	Edit Access View PDF



✕

One Defendant 1 - 01.01.70

Two Defendant 2 - 04.02.59


Save and close

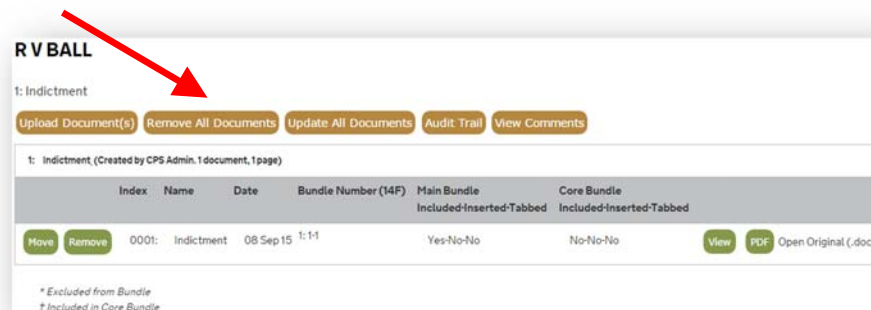
REMOVE ALL DOCUMENTS

Within the Section area users can also 'Remove All Documents'.
Click on **Remove All Documents**.

A pop-up window will appear asking again if you are sure you want to remove all the documents from this section.

Click **Okay** to proceed, otherwise click **Cancel**.

 *This function should almost never be used*



R V BALL
f: Indictment

Upload Document(s) **Remove All Documents** Update All Documents Audit Trail View Comments

f: Indictment (Created by CPS Admin. 1 document, 1 page)

Index	Name	Date	Bundle Number (14F)	Main Bundle Included-Inserted-Tabbed	Core Bundle Included-Inserted-Tabbed	
0001	Indictment	08 Sep 15 1:11		Yes-No-No	No-No-No	View PDF Open Original (.docx)

* Excluded from Bundle
† Included in Core Bundle

UPDATE ALL DOCUMENTS

Click **Update All Documents** to update.

i *Update All Documents* allows users to edit the details of a document within the bundle, but not the content or text within a document.

To edit an entry, click on it. Once changes have been made, they are saved automatically.

Click on a document to make the fields become editable. Fields that may be changed include:

- **Document number** The majority of sections are set to sort documents by number so editing this field will change the order of the documents in the section.
- **Document Title** The name of the document. Care should be taken as if this is changed additional copies may appear in the bundle that would otherwise be captured by the de-duplication process.
- **Document Date** The date that appears is typically the date the document was uploaded into the bundle. If there was a delay in uploading the document into the bundle you may want to put in here the date that the document was received. This will not change the actual date and time of upload recorded in the blue bar at the top of the document in the review screen
- Should document appear in the Main Bundle and/or in the Core Bundle.

i *The Main Bundle includes all documents uploaded and ingested into the Digital Case File, this is the complete bundle that is used in court. The Core Bundle is a streamlined bundle with just the most relevant and pertinent evidence. The Core Bundle is not presented in court on DCS, but can be downloaded as a PDF.*

R V BALL

1: Indictment

Upload Document(s) Remove All Documents **Update All Documents** Audit Trail View Comments

1: Indictment (Created by CPS Admin. 1 document, 1 page)

Index	Name	Date	Bundle Number (14F)	Main Bundle Included-Inserted-Tabbed	Core Bundle Included-Inserted-Tabbed	
0001	Indictment	08 Sep 15 11:11		Yes-No-No	No-No-No	View PDF Open Original (.docx)

* Excluded from Bundle
† Included in Core Bundle

Update All Documents

Click on an entry to edit. Changes are saved automatically.

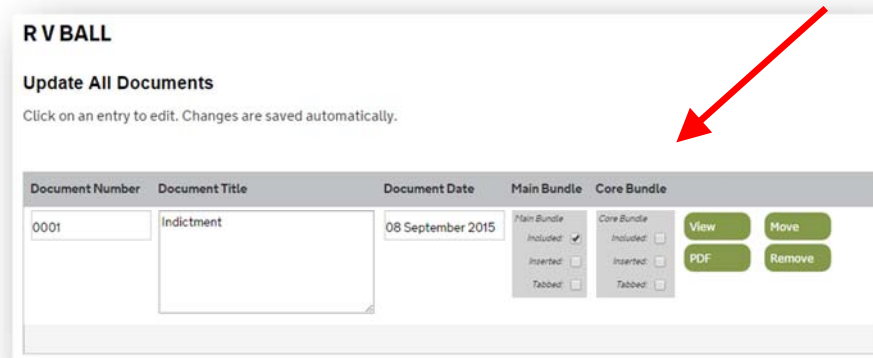
Document Number	Document Title	Document Date	Main Bundle	Core Bundle	
0001	Photograph of Knife	09 October 2017	<input checked="" type="checkbox"/> Included <input type="checkbox"/> Inserted <input type="checkbox"/> Tabbed	<input type="checkbox"/> Included <input type="checkbox"/> Inserted <input type="checkbox"/> Tabbed	View Move PDF Remove

Users can also:

- **View** the document
- **Open** the document as a PDF
- **Remove** the document
- **Move** the document to another section. To do this:
 - Click **Move**
 - On the pop-up window, select a section from the drop-down menu
 - Click **Move** again

The document then disappears and moves to the section selected.

The **Document Number** in the new section should then be edited to set the correct order in the section in which the document appears.



RV BALL

Update All Documents
Click on an entry to edit. Changes are saved automatically.

Document Number	Document Title	Document Date	Main Bundle	Core Bundle	
0001	Indictment	08 September 2015	Main Bundle Included <input checked="" type="checkbox"/> Inserted <input type="checkbox"/> Tabbed <input type="checkbox"/>	Core Bundle Included <input type="checkbox"/> Inserted <input type="checkbox"/> Tabbed <input type="checkbox"/>	<input type="button" value="View"/> <input type="button" value="Move"/> <input type="button" value="PDF"/> <input type="button" value="Remove"/>