CREATE NOTES IN THE DIGITAL CASE FILE

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DCS has the ability to make notes in the bundle by adding comments.

These can be used to highlight key arguments or evidence, assist in summations, help with cross examining or provide quick links to documents.

However you use them, either when preparing a case or making comments live in court, they are flexible, easy to add and can help keep track of a case and navigate to key pages more efficiently.

CREATE A COMMENT

From the Review pane, you may optionally choose the colour of your comment [5] to distinguish as seen fit e.g. separate types of arguments, defendants, or if the evidence is for or against your case. Setting the colour prior to making any comments will change the default.

Choose from the four options:

1. The outline of a rectangular
2. Solid rectangle
3. Highlight text
4. Freehand drawing.

Then draw on the document with the mouse to open the comment dialogue box.
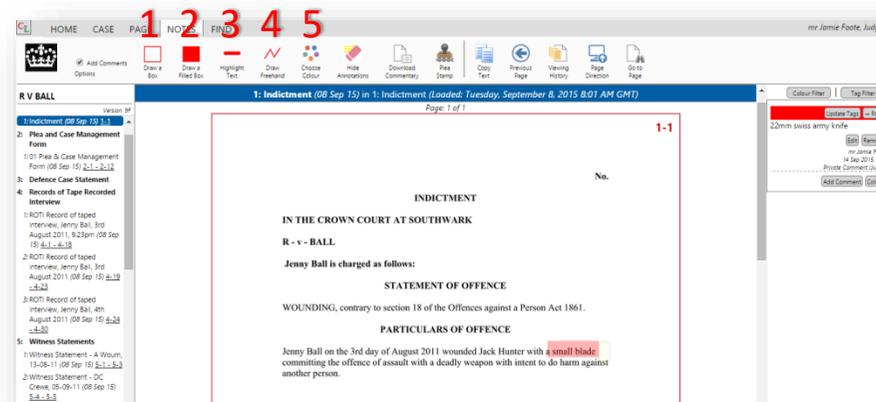
Choose the privacy level of your comment.
There are three options; **Private Comment** (default),
**Tightly Shared Comment**, or **Widely Shared Comment**.

1. A **Private Comment** can only be seen by the user that created the comment, and cannot be seen by anyone else within the case.
2. A **Tightly Shared Comment** can only be seen by people within the same role type**.
3. A **Widely Shared Comment** can be seen by everyone who has access to the case.

**Role Types are:

- HMCTS Admin
- Judge (Full time Judge and Fee Paid Judge)
- CPS Admin
- Prosecution (CPS Prosecutor, Associate Prosecutor and Outside Prosecuting Advocate)
- Defence (Defence Advocate, Defence Person and Solicitor Admin)
- NOMS

For users in the defence role, tightly shared also restricts the comment to those defence users who are associated with the same defendant as you.

Defence users only, may increase the level of tightly sharing to include defence users associated with other specified defendants, or the prosecution (in this case both CPS Admin and Prosecution Role Types).
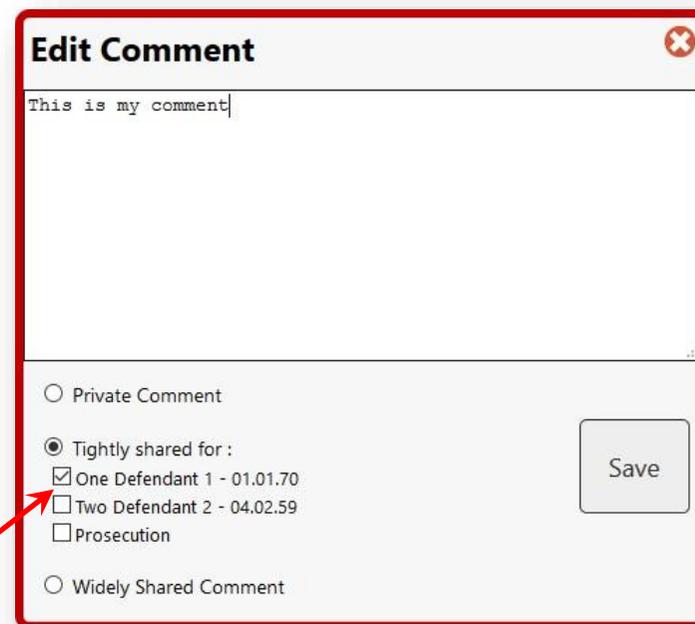
Edit Comment ⊗

This is my comment

○ Private Comment

⦿ Tightly shared for :
☑ One Defendant 1 - 01.01.70
☐ Two Defendant 2 - 04.02.59
☐ Prosecution

○ Widely Shared Comment

Save

COMMENT OPTIONS

Located in the comment pane on the right-hand side will be all the comments you've made, and other people's comments shared with you.

With your own comments, there are several options available:

Go directly to the page where the comment is by clicking the **Page** button.

1. **Edit** own comments by clicking on the **Edit** button. Click **Save** when finished.
2. **Remove** own comments by clicking on the **Remove** button. Then click **OK**
3. Add a comment to a comment by clicking **Add Comment**:
   These look the same as a normal comment but are linked to the original comment and appear just below the original comment.
4. Change colour of comments by clicking **Colour** and selecting a colour from the pop-up.
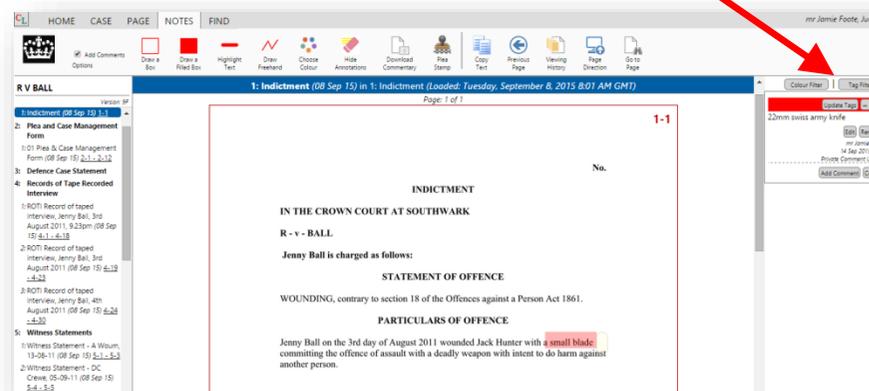
TAG COMMENTS

Tags are a useful way of grouping comments together.

To create a tag or assign a tag to a comment, click the **Update** Tags button.
A pop-up window will appear.

> *ℹ️ **ALL** tags created on a case will be available here, not just the tags you create. What this means is that if you create a tag name, that tag name is visible to **everyone** who can access this case.*

Type the tag in the blank tag box, then tick the corresponding box and click **Save**.

The tag will appear just above the comment.
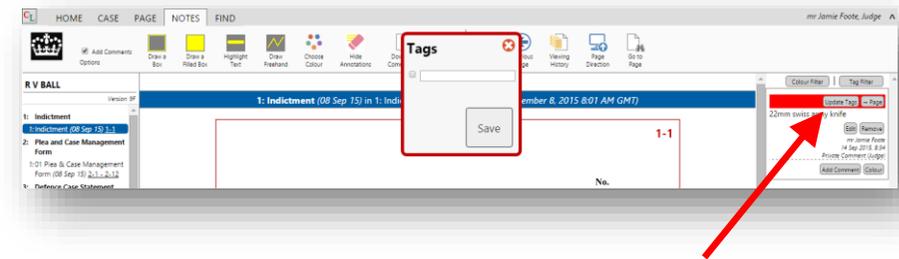
FILTERING NOTES (TAGS & COLOUR)

To help find groups of comments, use the **Colour Filter** and the **Tag Filter**

The **Colour** and **Tag** filters are located at the top of the comments section.
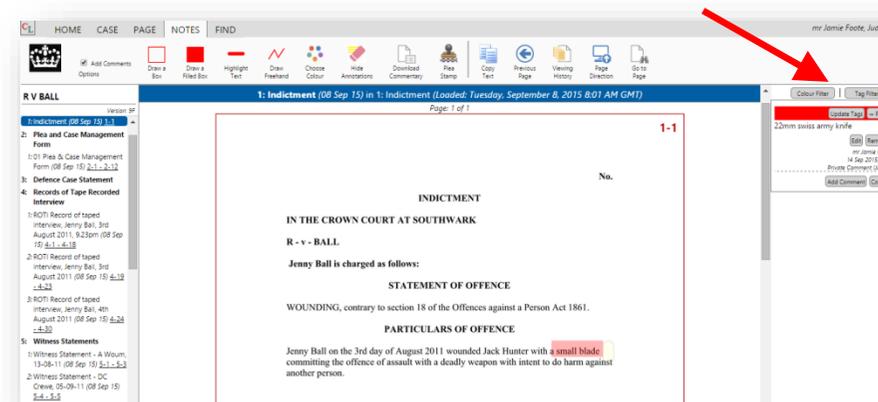
CREATE A SUMMARY OF YOUR NOTES

DCS allows users to export all private comments and widely shared comments in the case.

This is particularly useful if a Judge wants to use this for summing up, or Prosecution or Defence want to collect all comments for a closing statement.

To export comments, click the **Download Commentary** button.

Either download the comments as a PDF file or an Excel spreadsheet.
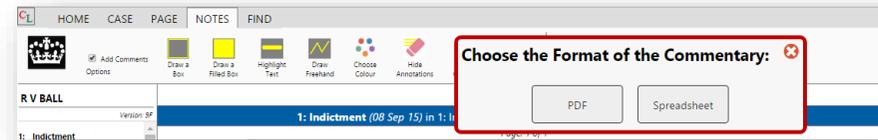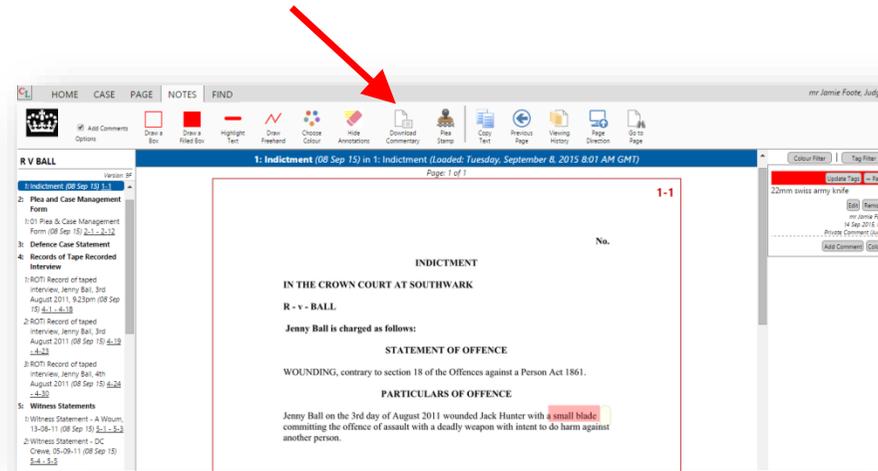
EXPORT NOTES TO PDF

Click **PDF**

Click **Open** to export the comments to a PDF file.

1. The first page contains a brief summary of the case details:

    - who exported the PDF
    - when it was exported

    meaning users always know if they have the latest version of comments.

2. The second page shows the front page of the case.
3. Subsequent pages show all private comments and widely shared comments ordered in the same order as the digital bundle and separated into sections.

    Each comment includes:

    - page and page reference number
    - a picture of where on the page the comment was made
    - the text in the comment
    - the name of the person who made the comment
    - when it was made
    - whether it was widely shared or a private comment

The Case Commentary can be saved to work on it offline if needed.

EXPORT NOTES TO EXCEL

Click **Download Commentary**.

Click **Spreadsheet**.

Click **Open**.

Summary details of the case appear in the 'Summary' tab.

Click the Comments tab to show :

- A list of all the comments including details of where the comments are positioned in the bundle
- Colour of the comment
- If comment was assigned any tags
- Comment text
- Who made the comment
- If comment was private or widely shared.

When finished, close the Excel Spreadsheet.