

# INGEST A BUNDLE INTO A CASE

## UPLOAD ZIPPED FILES

Uploading a zip file to DCS is a great way of quickly uploading multiple documents into new Sections.

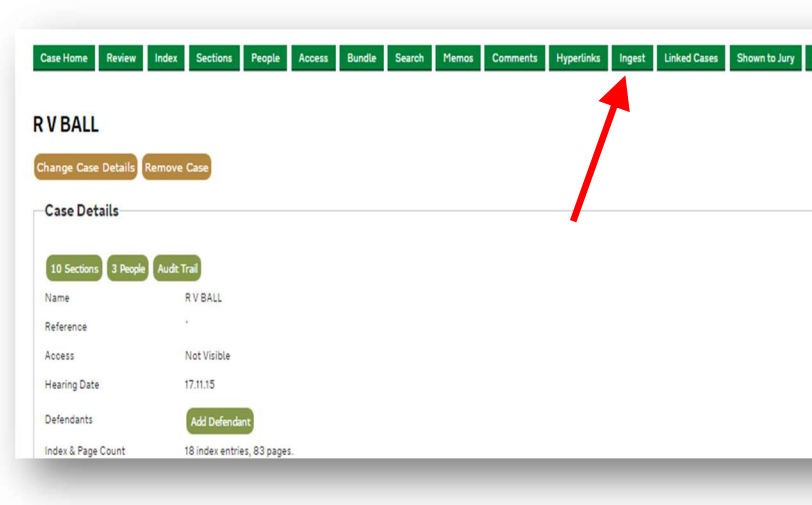
Using the standard file structure create your folder list.

House the relevant documents within these folders, and put them all into a zip file.

To create a zip folder:

1. Select the documents and folders to zip
2. Right-click on one of the folders
3. Hover over 'Send to...'
4. Select 'Compressed (Zipped) Folder'.

When on the **Case Home** screen, click on the **Ingest** button (shown by red arrow).



## QRG: Ingest a bundle into a case

PDF files may also be ingested.

The PDF must have 2 levels of bookmarking:

- Level 1 bookmarks – used to create sections
- Level 2 bookmarks – used to find the start of individual documents and used for the names of those documents.
- Level 3 & 4 bookmarks will be ignored by the system.

Associate a defendant with the bundle using the tick box at the top. This association will apply to all documents destined for sections with defence access restrictions (e.g. Pre Cons) - these documents will only be visible to representatives for the selected defendant(s). Documents destined for other sections (e.g. Witness statements) will be visible to representatives for all defendants.

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 ingest a bundle to one of these sections without associating a defendant, you will see an error message.

Click on **Add files** to open the browser, find the zip file to upload and click OK.

Once the file has been selected, click **Start Upload**.

### Ingest Composite File

*Note: If you are loading one or more individual document files please click on Sections (above) followed by Upload Document(s).*

To ingest a single composite file click on *Add Files*. Then click on *Start Upload*. Choose either:

1. A PDF with two levels of bookmarking:
  - Level 1 bookmarks are used to create sections in the bundle. Level 2 bookmarks are used to find the start of individual documents and used for the names of those documents. Level 3 and level 4 bookmarks are ignored.
2. A ZIP file with one level of subfolders and documents within those sub folders
  - The names of the subfolders are used to create sections in the bundle. The files within the subfolders are loaded into the section. The documents are named with the name of the file.

SMITH, John, 1/1/80

#### Select files

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

Filename	Status	Size
Drag files here.		

0%
0 kb

SMITH, John, 1/1/80  

**⚠ Defendant selection is mandatory for this case, please select a defendant from the list above. ✖**

## EDITING DOCUMENT ACCESS PERMISSIONS

Defence access to documents within section with Defence Access restrictions may subsequent be edited, if necessary.

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
<a href="#">Move</a> <a href="#">Remove</a>	0001: Previous Convictions - Kenobi	09 Oct 17	1: N1 - N11	Yes-No-No	No-No-No	<a href="#">Edit Access</a> <a href="#">View</a> <a href="#">PDF</a>
<a href="#">Move</a> <a href="#">Remove</a>	0002: Previous Convictions - Skywalker	09 Oct 17	2: N12 - N15	Yes-No-No	No-No-No	<a href="#">Edit Access</a> <a href="#">View</a> <a href="#">PDF</a>

✕

One Defendant 1 - 01.01.70

Two Defendant 2 - 04.02.59

Save and close