

CIVICA



Advance Bundling Guide

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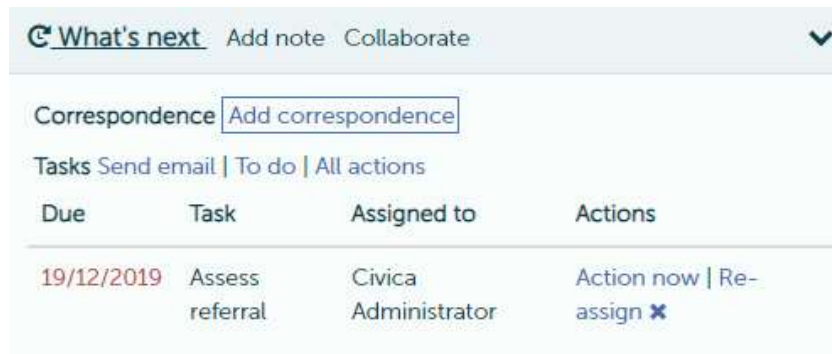
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Advance Bundling Guide

Bundling allows several different correspondence items to be brought together into a single PDF. This is most associated with court bundles but can be used for many other purposes. This will go through the steps required to create a bundle.

Creating a Bundle Cover Sheet

A bundle cover sheet provides key details about the case you are creating a bundle for. To create your bundle cover sheet, the first step is to select “Add correspondence” on your “Status” tab of your chosen case.



The screenshot shows a software interface with a header bar containing "What's next", "Add note", and "Collaborate". Below the header, there is a section for "Correspondence" with a button labeled "Add correspondence" highlighted by a blue box. Underneath, there is a "Tasks" section with sub-links for "Send email", "To do", and "All actions". A table follows with columns for "Due", "Task", "Assigned to", and "Actions".

Due	Task	Assigned to	Actions
19/12/2019	Assess referral	Civica Administrator	Action now Re-assign ✕

This will bring you to a page of ad-hoc letters. By selecting “Bundle cover sheet” and then pressing “Next” at the bottom of the page, the system will populate the form.

✎ Correspondence

Please select from the list below.

Blank letter to case contact

Bundle cover sheet

Case expenses

Next

After pressing “Next”, the system will bring you back to the “Status” tab of the case.

Before using the bundle cover sheet, it is best practice to check the document. This is done by selecting “Edit” followed by “Edit document” from the drop-down list.

🔄 What's next Add note Collaborate ▼

Correspondence Add correspondence

Due	Type	Recipient	Actions
+ 30/01/2020	Bundle cover sheet	Document	Edit

Tasks Send email | To do | All actions

Due	Task	Assigned to	Actions
19/12/2019	Assess referral	Civica Administrator	Action now assign

- Edit document
- Email document
- Mark complete
- Save draft version
- Request approval
- Re-assign

The system will show you the document, and at this point you can edit any information. Please note, if the information is incorrect then please check and update this through the “Edit details” drop down list on the “Status” tab of the case. Then generate the form again.

Once you have checked the document, select “Mark complete”.

Back

Save

Preview / print

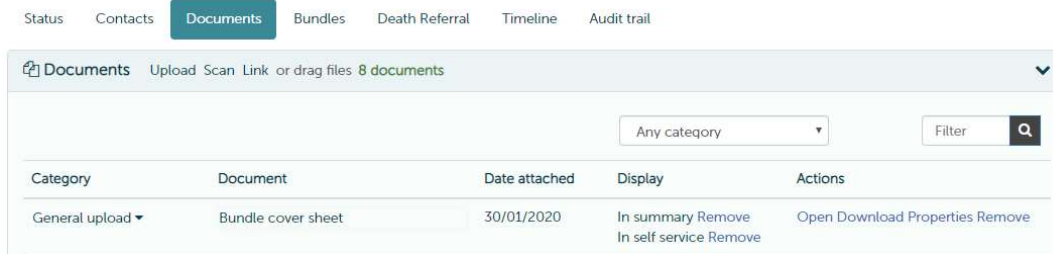
Attach to email

Mark complete

Locating your Bundle cover sheet

Once you have completed your bundle cover sheet it will be located in the “Documents” tab of your case.

This is a good time to ensure all your documents are labelled correctly.



Category	Document	Date attached	Display	Actions
General upload ▾	Bundle cover sheet	30/01/2020	In summary Remove In self service Remove	Open Download Properties Remove

Building your Bundle

Once you have completed your bundle cover sheet, the next step is to start building your bundle. You can do this in the “Bundles” tab.



To create a new bundle, select Menu and then Add Bundle



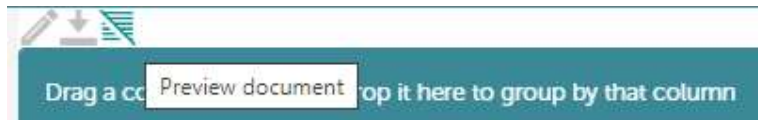
Highlight a structure and press “Select”.

Drag a column header and drop it here to group by that column	
Name	Description
Simple bundle	
DB1	
Childcare	Childcare
Simple	Simple

Name your Bundle and add a description, and press "Save". This will load your bundle structure; any pre-defined sections will be automatically added.

Adding Documents to the Bundle

To preview you're a document before adding it to the Bundle, highlight the document and select the end symbol in the top



The first document you will want to add to your bundle, is your "Bundle cover sheet". This can be done by dragging and dropping the document into the "Coversheet" section of your bundle.



Adding sections and documents to your Bundle

To add another section to your bundle, select the plus sign in the top left-hand side. Then name your new section. Once you have your sections ready, drag and drop the rest of your documents into your chosen sections.

Rearranging documents in your Bundle

Once the documents are added to your bundle, you might want them in a specific order. To move any document into a different section or in a different order, highlight your document which has been added in.

Then drag and drop the document to its new location. Items which have already been added to the bundle will show in dark Green

Coversheet		Drag a column header and drop it here to group by that column			
Preliminary Documents		Date	Description	Category	Author
Application and Orders		23/09/2020	Health Visitor Statement	School reports	Rod Wallace
[23/Sep/2020] Medical Report		23/09/2020	Social Report	Application	Met Sterland
[23/Sep/2020] Family Statement		23/09/2020	Family Statement	Application	Howard Wilkinson
Care Plans		25/09/2020	Bundle cover sheet	General upload	Civica Administrator
[23/Sep/2020] Adding an Alert Note.docx		23/09/2020	Bundle cover sheet	Correspondence	Civica Administrator
Medical Statements		23/09/2020	Adding a to do item.docx	General correspondence	
Other Statements		23/09/2020	Childcare(1)	Documents uploaded	
		23/09/2020	Childcare(1)	Documents uploaded	
		23/09/2020	Go Live Period.docx	Application	

Removing documents and sections from your Bundle

Right click on the document or section you wish to remove and select "Remove". Then confirm "Yes"



Repagination for removed items

If you remove an item from a bundle this will repaginate those items below it. So, for example if you remove A7 then the item that was A8 would become A7.

if you do not want this to happen then leave the item in use the export option and ensure the removed item is unselected.

Then on the radio set for export option select

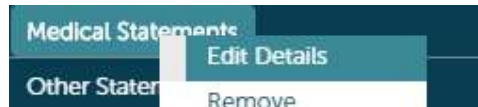
Partial – This will exclude the removed item from the index page

Lowlight – This will include the removed item in the index page but in a greyed-out font



Renaming your sections within your Bundle

Right click on the section name and select “Edit Details”. Then edit the “Title” and save.



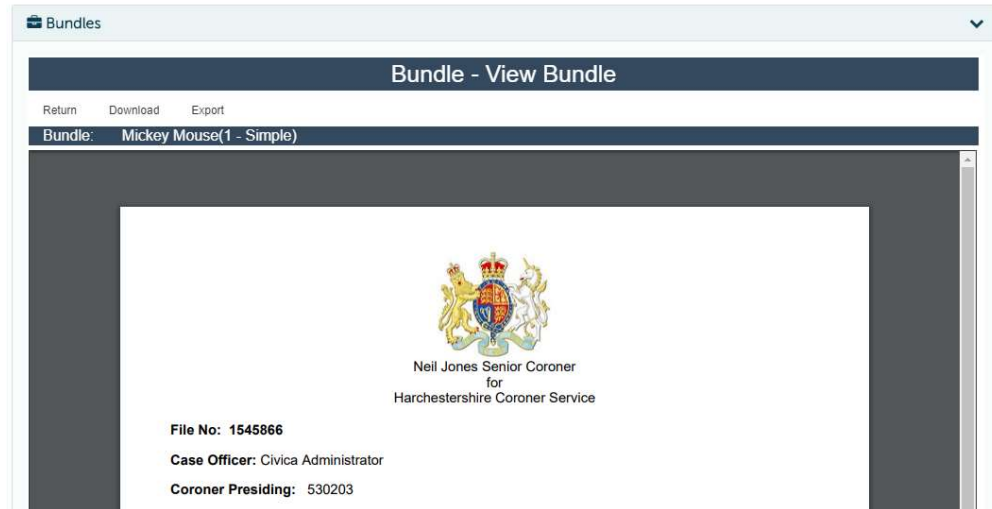
Making your Bundle into a document

Select “Build” from the top bar of the Bundle’s page.



The system will refresh and generates an Index page which is added to the bundle. The system will show you the created Bundle and allows you to quickly access documents from the paginated Index.

In the top right corner, you will have the option to “Return”, where you can continue to edit the document. Then “Download” and “Export”, these two options allow you to save the document away from the system.



Where to locate your Bundle once built.

When you have completed your Bundle, it will be automatically saved to your “Documents” tab of your case.

Adding to a bundle

If you have an existing bundle and want to add or amend to this then you can go back into the bundles tab. This will load the existing bundle, if you have another bundle which you wish to amend if you go to Menu and then select bundle.



When the bundle is loaded the existing documents already in the bundle are shown in Green.

To add a new item, highlight the new item and drag this into the relevant place in the existing bundle structure. This will automatically add this under the item it is dragged across to.

If this is added to the middle of the section or bundle, then a decision is needed to be made around the pagination

1. If you wish to re-paginate all subsequent items, then there is no need to anything
2. If you wish to add the new item as a supplementary item (Eg A2a, A2b) then click on the document within the bundle structure and select Supplement



Upon clicking on build this will build the new index with the page numbering as required. In the below example you can see how there are two supplementary items.

SECTION A – Evidence			
Document	Date	Author	Pages
Go Live Period.docx	27/02/2020		A1 – A1
End User Day 1 Agenda.docx	27/02/2020		A1a – A1a
Completing the Form 121.docx	27/02/2020		A2 – A2
Notification to foreign embassy - draft version	24/02/2020		A2a – A2a
Adding an Alert Note.docx	27/02/2020		A3 – A3

Emailing a bundle structure

When sending a bundle, the most efficient method is to send this via secure email. This will ensure that this is sent as a link contained password protected email. This would mean that the bundle itself is never sent via attachment so there are no file restrictions in place.

The user would receive two emails.

Email 1 would contain the password


Email 2 would contain a link to click on to access, upon clicking on the link the user is prompted for a password

Neil Jones

Civica Administrator
Senior Coroner
01111111111
neil.jones@civica.co.uk
[Contact us about this case](#)

Send securely ⓘ Password Baneutmi81+ will be sent by separate email

[← Previous](#) [Send message now →](#)

 **Access restricted details**

Password

Upon entering the password, the user would see the email and any attachments

Documents attached

[Court bundle](#)

Exporting bundle structure

Within the software it is possible to export and extract single or multiple elements from the bundle. Click on the export button and then tick which items you wish to export; this can be individual or multiple pages or section. There is also a tick box to add to the document list, this means that the new item will appear as a separate document under the documents tab.

