



How to enable uploads to a Sub-Bundle

Uploading materials to separate sub-bundles allows different parties to add material to the same case without revealing files to each other until the case is fully prepared. All documents added are visible in the Master Bundle.

Enable Uploading

- 1. From the update screen of your case, select the **Bundles** tab.
- 2. Select the **Sections** button next to the sub-bundle.
- 3. Select **Add** next to the section(s) you want to add to your sub-bundle.

Case HomeReviewIndexSectionsPeopleMy Share GroupBundlesSearchNotesHyperlinksUploadLinked Cas

SAMPLE v. SAMPLE

Bundles

Create New BundleRefresh All Bundles

Index	Name	Version Number	Timing	Update / Remove	Edit	Download	Redactions
01	Master Bundle	22	December 07, 2021 05:49 PM less than one minute		Settings	Download	
02	Expert Witness	—	—	Update Remove	Settings Sections	Download	Redaction Categories

SAMPLE v. SAMPLE

02: Expert Witness

BundlesRefresh

Bundle Sections

Section Number/Letter	Section Title	Section Order	Bundle Specific Order	Allow Document Upload & Delete	Include Documents by Default	Exclude Documents by Default
A	Plaintiff/Claimant Material	001				Add
B	Defendant/Respondent Materials	002				Add
C	Applications and Orders	003				Add

- 4. Check the **Allow Document Upload & Delete** box for the appropriate section(s).
- 5. Choose the **Include Documents by Default** or the **Exclude Documents by Default** options.

SAMPLE v. SAMPLE

02: Expert Witness

BundlesRefresh

Bundle Sections

Section Number/Letter	Section Title	Section Order	Bundle Specific Order	Allow Document Upload & Delete	Include Documents by Default	Exclude Documents by Default
A	Plaintiff/Claimant Materials	001	001	☐	☐	☒
B	Defendant/Respondent Materials	002	002	☐	☐	☒
C	Applications and Orders	003	003	☐	☐	☒

When a document is uploaded to a sub-bundle with the **Allow Document Upload & Delete** option checked, it will be marked as included, even if **Exclude Documents by Default** is checked.

Sample v. Sample Inc.

02: Expert Witness

C: Applications and Orders

BundlesSectionsRefresh

Bundle Section Documents

All documents are excluded unless specifically included below:

Bundle Specific Order	Included	Inserted	Tabbed	Index	Name	Page Count	Page Range	Edit	YM 5th Image	Date (US)	NE Stamp Def
	☒				0001 Application ABC	3		Edit			