



# IT Trainers Guide Court Bundling



## Table of Contents

Page Number	Heading
2	Forward
3	Getting Help System Requirements Contacting Zylpha Support
4	Creating a new Court Bundle Creating a new Court Bundle from a template
5	Open and change an existing Court Bundle Create a subpage in a Court Bundle How to define a Template for a Court Bundle
6	TO create a new template from an existing court bundle To create a new court bundle template
7	Sort documents in a bundle Saving a Court Bundle
8	Add documents tab
10	Add Document - Right Click Menu
11	Bundle index format
13	Case details tab
14	Create bundle tab for court bundle
15	Temporary bundle Saved bundle

## **Forward:**

This guide has been created for the sole purpose of IT Teams and those providing training to end users (train the trainer). As such we have tried to create a guide that shows you how to use our product and it's core functionality in a simple, easy to understand way.

As someone who has had to print huge training guides full of large colour screen grabs (which were mainly superfluous), we vowed to create IT training guides that did not feature tons of them but were comprehensive in supporting the person using them. The help file within the program itself contains the same information but with more screenshots (if you like that kind of thing).

We have split the guides out to focus on the different functions within our bundling product. This guide is solely about the court bundling process, which is our most utilised aspect.

Lets get started.

## **Getting Help**

There are various ways you can access help for Zylpha Bundling Solution:

- By pressing the "F1" key while in Zylpha Bundling Solution the relevant help page will be displayed.
- Via the program by accessing the "Help" option on the "Help" menu.
- From the Start menu, select Programs, then Zylpha Bundling Solution and click Zylpha Bundling Solution Help.

## **System Requirements**

Below is a list of recommended system requirements to use Zylpha Bundling Solution

- PC with Intel® Pentium®/Celeron®/Xeon™, AMD K6/Athlon™/Duron™ or compatible processor. Processor should be 200MHz with 1GB of RAM
- .NET Framework 3.5 or later
- Microsoft® Windows XP or later
- Adobe Reader or equivalent pdf reader

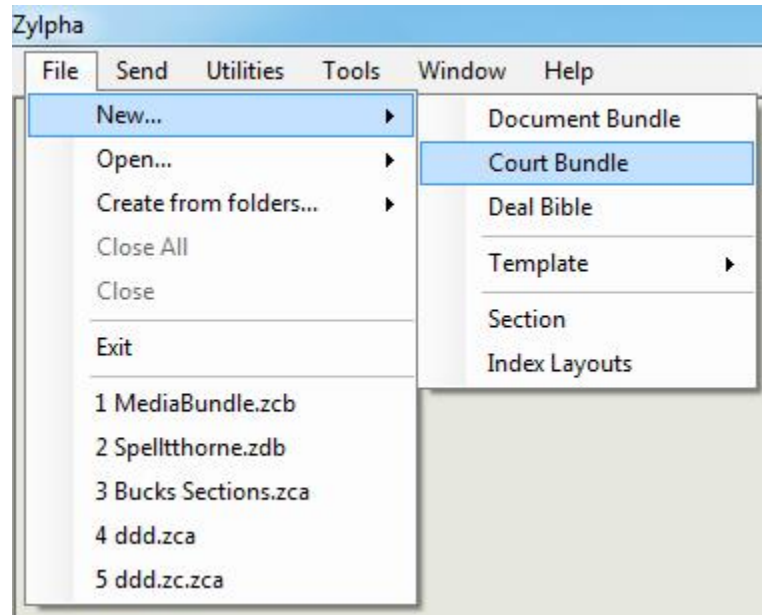
## **Contacting Zylpha Support**

Please refer to your contract which will specify the correct escalation and front line support procedures for contacting Zylpha support.

Generally, we ask for one sole point of contact within an organisation who can contact us on [support@zylpha.com](mailto:support@zylpha.com) which is monitored during normal working hours.

## Creating a new Court Bundle

This will take you through the various steps required to create a new Court Bundle.



- Select "Court Bundle" from the menu "File" and then "New...", as below.
- From the displayed "Select the Template to be used..." window select the "Don't use a Template?" to create a bundle from the default settings.
- Enter the information required for the front page on the "Case Details" tab.
- Enter the required sections on the "Sections" tab.
- Change the "Numbering Styles" on the "Sections" tab as required.
- Include all the documents required for the bundle and attach them to their section on the "Add Documents" tab.
- Optionally, handle any warnings by viewing the "Warnings" tab.
- Generate the bundle by clicking "Generate" button on the "Create Bundle" tab.

## Creating a new Court Bundle from a template

This will take you through the various steps required to create a new Court Bundle using a template.

- From the "File" menu select "New..." then "Court Bundle"
- From the displayed "Select the Template to be used..." window select the location of the template you wish to use. Once you have selected the template click the "OK" button.

- This will open a “New Court Bundle” window with the settings based on the values stored in the template.
- Make the changes you require, e.g. add any documents. Once you have made your changes to the bundle you can save and/or generate the bundle.

### **Open and change an existing Court Bundle**

The various steps required to open and make changes to a Court Bundle:

- Open Court Bundle from the menu "File" then "Open..." and then "Court Bundle", as below.
- This will display the dialog box shown below, locate the bundle you wish to open and either double click on the file or select the file and click the "Open" button.
- To change information for the cover page go to the "Case Details" tab.
- To change information for the sections go to the "Sections" tab.
  - To change information for the documents go to the "Add Documents" tab.
  - Optionally, any warnings can be viewed via the "Warnings" tab.
  - If you need to generate the bundle go to the "Create Bundle" tab and click the "Generate" button.

### **Creating a subpage in a Court Bundle**

This page explains how you create a subpage in a Court Bundle.


- Open the Court Bundle that you want to add a subpage to.
- Click on the "Add Documents" tab and enter the document that you want to add as a sub page if it isn't already present.
- Check the "Sub Page" cell for the required document. If "Sub Page" isn't displayed in the tab check the icon at the top of the tab to view the "Bundle Index Format" see if "Sub Page" is displayed on the Document tab.
- When you then generate the bundle the sub page document will be added to the index and contents using the sub page pagination rules so as not to affect the index items around it. For example if a sub page document was added between two documents which have pages "A-1" and "A-2" respectively, the sub page document will start its page numbers at "A-1-a", then "A-1-b" and so on.

## **How to define a Template for a Court Bundle**

If you create multiple court bundles that are very similar in their format, e.g. cover page, index layouts, sections, etc. You can create a template that has the styling you require which you can then use as a basis for a court bundle each time you need to create a new one. This will stop you having to repeat the same steps every time you need to create a court bundle.

This section details the steps required to create a template to be used for a court bundle. You have two choices when creating a template either a new one or from an existing court bundle.

### **To create a new template from an existing court bundle**

If you have a court bundle that already has or is close to the format you require you can create a template from the bundle and then tailor it as you require. To do this open the court bundle and then in any of the tabs click the  icon which is at the top of the tab.

You will be asked what name you want to save the template as and then the template will be created, saved and opened for you to view and amend as necessary.


### **To create a new court bundle template**

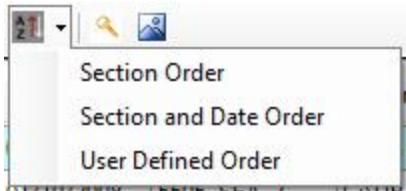
To create a template from the start you will need to perform the following steps:

- From the “File” menu select “New...” then “Template” and finally “Court Bundle” which will open a new court bundle template window. The tabs are very similar to the ones you see when viewing a court bundle.
- On the “Case Details” tab you can enter the case details which are used to create the bundles cover page.
- The “Sections” tab is where you enter the templates sections, index and numbering styles.
- Any documents that you want to be included in the template are entered in the “Add Documents” tab
- “Create Bundle” tab is where the templates generated options are set. There are a couple of items which you can’t access on this tab. You can’t set a “Save as” location and there is no button to generate the bundle.

N.B. Any setting made in a template can be overridden in the bundles created from it. The template is only a common starting point to speed up the time taken to create similar bundles

## Sort documents in a bundle

The "Sort Bundle" option is available from the "Add Documents" tab toolbar via the  icon. The documents can be sorted by clicking this icon, the order you select will affect the bundle index when you next generate.



By selecting the "Section Order" sort option the documents are sorted in the order the sections are listed on the "Sections" tab for the bundle.

Selecting the "Section and Date Order" sort option the documents are sorted in the order the sections are listed on the "Sections" tab for the bundle and then in ascending order of the Document Date.

Choosing the "User Defined Order" allows you to format the sort to your requirements.

The sort must have "Section" as the main part of the sort, and this is therefore pre-selected. After that you can select which ever field you want to sort by from the drop down list and whether the order for that field is ascending or descending. A field can only appear once in the sort and the warning icon is displayed next to the field of a repeated entry.

Once you are happy with the selection click the "OK" button to action the sort. The "Cancel" button will return you back to the "Add Documents" tab without performing the sort.

## Saving a Court Bundle

This explains how you save a Court Bundle, you can either save a bundle with its current name, i.e. the "Save" option or save it from its current name to another name, i.e. the "Save As" option.






- To "Save" the bundle click the icon at the top of the tab.
- To save the bundle as another name click "File" menu and select "Save As...".
- If you select "Save As..." then the "File Dialog" box will be displayed allowing you to select the new location and file name for the bundle, click the "Save" button to action the save. If the file already exists then a warning message is displayed to inform you that you will overwrite this file.



## Add Documents tab

The "Add Documents" tab is the place where documents which make up the bundles are linked to a section so that they can be positioned in the correct part of the bundle.

There are various right-click options that you can access from the document grid and these are described here.

Icons	Description
	Delete the selected document row(s) This icon will remove any selected document line(s) from the bundle. It will only be selectable when the whole line is highlighted, which is achieved by clicking on the row header. There is a confirmation message displayed to make sure this is the line(s) you want to delete.
	Move a document up or down Documents can be moved up or down by selecting a document and clicking on either of the icons, depending on which way you want the document to go. You can also drag and drop the lines.
	Sort Documents The documents can be sorted by clicking this icon, the order you select will affect the bundle index when you next generate. For a more detailed description view the Sort a Bundle help.
	Change the index format The index pages and document tabs can be formatted differently from the default values so you can produce the index page you require and view the columns you need on the "Add Documents" tab. This allows different set ups for different types of bundles. For a more detailed description view the Bundle Index Format help.
	Create a template from this bundle This will convert the current bundle into a template which can be used as a template for other bundles to speed up their creation.

The Document grid's columns are described below, if you can't see a field it will have been set as not visible in the tab to view a hidden column click the index button at the top of the tab.

Section	contains a drop down list of all the sections entered on the "Sections" tab for the bundle.
Document Date	displays the date which will appear next to the document on the index page. The date will default to the document's create date when it is added but can be overridden. To select a date double click in the cell and the "DatePicker Dialog box" is displayed to enable the required date to be selected. You can also add text into the date field, this handles situations for example when the date is a range, e.g. "01/03/2010 - 15/03/2010" or "March - May".
Description	contains the description which will appear on the index page for the document. It will be defaulted to the document name when it is added. It is easier to edit the description by double clicking the cell to view the "Maintain Document Description" form.
Document Path	displays the location of the actual document you want to include in the bundle. To locate the document double click in the cell and the "DocumentPicker" is displayed, locate the document then either double click on the document or select it and click the "Open" button to add the path to the cell. You can also drag and drop files on to the grid see "Drag and Drop Documents".  N.B. if the cell is coloured red then the document is of a type that bundle can't convert to Pdf, see the "Features" page in the Help file for convertible types. If the cell is coloured orange then the path to the document is no longer valid.
Sub Page	If this cell is ticked then it signifies that this document should be handled as a sub page when it is paginated into the bundle.
User Defined Field 1	This field can be renamed to be used as required by the user to help extend the functionality of the index.
User Defined Field 2	This field can be renamed to be used as required by the user to help extend the functionality of the index.

Exclude from Index Numbering      Check this field if you don't want this document to be numbered in the index, it will be displayed on the index page without the numbering prefix. This field is only displayed when the "Number Documents in index" is checked on the "Section" tab.

### **Add Document Right Click menu**

The right click menu is available when you right-click the mouse inside the document grid on "Add Documents" tab and any selected rows in the grid will be affected by any action selected from the right click menu.

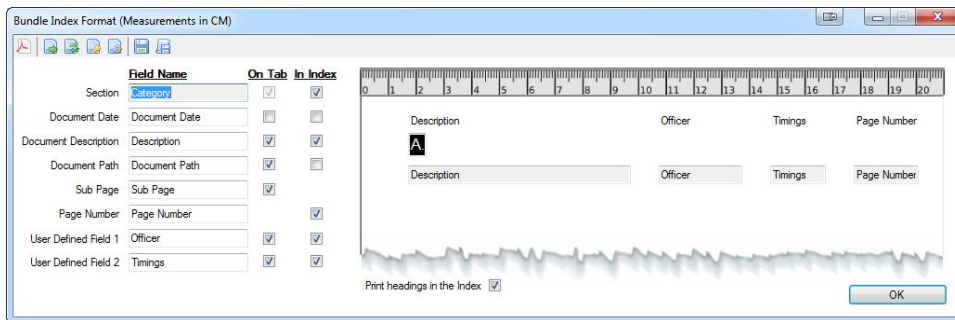
Descriptions from the "Add Documents" tab is shown below. Please note that the actions available on the list is dependent on the type of lines you are actioning and therefore the list will not always be the same

- |                           |   |
|---------------------------|---|
| Move Up                   | Moves the selected row up one row, this is only allowed when one row is selected  |
| Move Down                 | Moves the selected row down one row, this is only allowed when one row is selected  |
| Delete                    | Deletes all the selected rows after you have clicked ok on the confirmation screen that is displayed  |
| View Document             | Views the selected document, this is only allowed when one row is selected  |
| Insert a line             | Inserts a blank line after the last selected line, you will be asked to enter the section the blank line will belong to   |
| Properties...             | Displays the "Properties" form which allows you to change all selected lines on a single form.  |
| Size Media...             | Allows you to set the format of a media file in the bundle. Displays the "Set the media properties..." form which allows you to format the size of a media file in a bundle. This option is only available when the selected line is a media type |
| Select Excel Worksheet... | Allows you to select either all the sheets, which is the default, or a single worksheet from the spreadsheet. Displays the "Select the  |

worksheet" form which is a list of all the work sheets. This option is only available when the selected line is a spreadsheet file type.

## Bundle Index Format

This screen is accessible from the "Sections" and "Add Documents" tab via the icon at the top of the tab. Here the user can tailor the layout of the bundles index and the columns viewable on "Add Documents" tab. You can drag the start and end points of the index fields directly from the form.



The tab is shown below with descriptions of its features.

### Icons



Preview Index

### Description

This will show an example of the index page with the settings applied. The only difference from the generated bundle is that each index field has a coloured box around it to show its size. This will help positioning fields and identify overlapping fields. See an example of this previewed index page below.



Reset index fields to defaults

Click this button to return all the settings to your default settings.



Set as Default

Click this button to make these settings your default settings and will be used as your default for all new bundle created from this point forward.



Manually edit index values

This displays a numeric position of the index fields to allow a more precise positioning of the fields

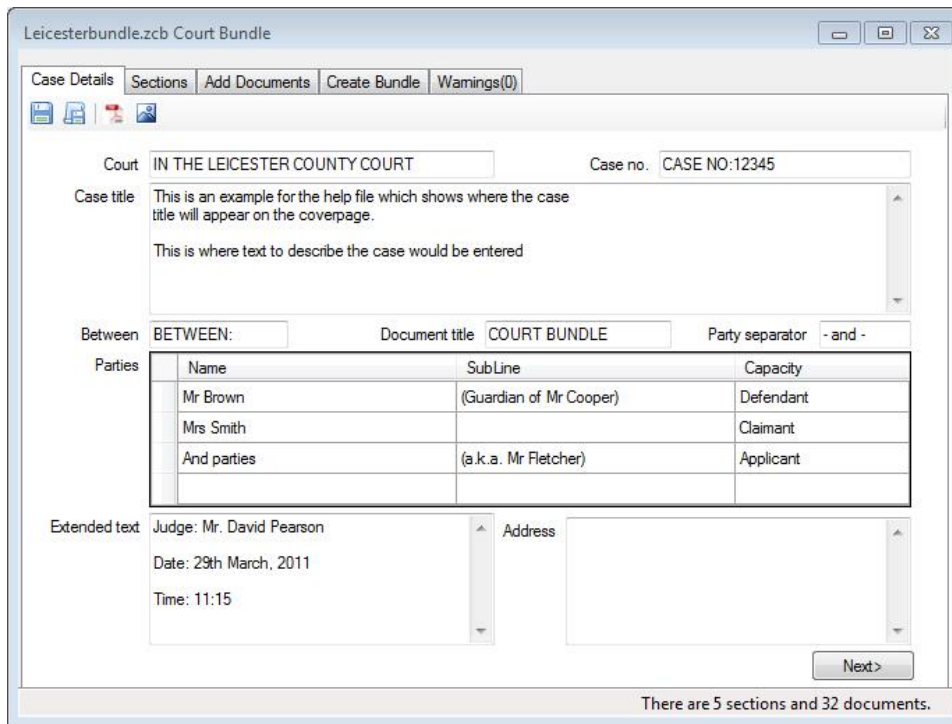
Print headings in the Index?

when checked causes the index page to also print the column headings.

The following fields Section, Document Date, Description, Document Path, User Defined 1, User Defined 2 and Page Number have similar fields which are described below.

Field Name	this text box allows you to rename the fields default name, for example "Document Date" might make more sense when called "Create Date". Changing this value will mean that the new value will appear in the Document tab column heading and the Index page heading, if the headings are printed in the index.
On Tab	When checked then this column will appear in the Document tab and unchecked it will not. The Section column must always be displayed and so this option is checked and can not be changed.
In Index	When checked then this column will appear on the Index page and unchecked it will not be shown. The Section column must always be displayed and so this option is checked and can not be changed. Also the "Sub Pages" column is preset to unchecked and can not be changed.
Position (only visible from the manually edit index values)	This field indicates the start position of the field on the index line. The field is only available if the "Visible in Index" field is checked and all measurements are in centimeters.
Length (only visible from the manually edit index values)	This field indicates the length of the field on the index line. The field is only available if the "Visible in Index" field is checked and all measurements are in centimeters. There is no Index Length field for the Section as this appears on it's own line in the index.

## Case Details tab



Leicesterbundle.zcb Court Bundle

Case Details Sections Add Documents Create Bundle Warnings(0)

Court IN THE LEICESTER COUNTY COURT Case no. CASE NO:12345

Case title This is an example for the help file which shows where the case title will appear on the coverpage.  
This is where text to describe the case would be entered

Between BETWEEN: Document title COURT BUNDLE Party separator - and -

Name	SubLine	Capacity
Mr Brown	(Guardian of Mr Cooper)	Defendant
Mrs Smith		Claimant
And parties	(a.k.a. Mr Fletcher)	Applicant

Extended text Judge: Mr. David Pearson Date: 29th March, 2011 Time: 11:15 Address

Next >

There are 5 sections and 32 documents.





The "Case Details" tab is where the information required to create the cover page for a Court Bundle is entered.

The fields Court, Case No., Case Title, Between, Document Title, Party Separator, Parties, Extended and Address text take their initial values from settings you enter in the "Application Settings" from the "Tools > Preference" menu item. This allows the form to be pre-populated to speed up the process but all of these values can either be added to or over typed as required.

The "Parties" grid lists the Names of the parties involved, an optional Sub-Line which appears below the Name entry on the cover page and their capacity in the case, e.g Applicant, Respondent, etc.

Entries in the "Parties" table can be reordered by either dragging and dropping to a new position or by right-clicking on the entry and selecting either "Move Up" or "Move Down" from the displayed menu.

Parties can be deleted by either selecting the row header (the grey column to the left of each row) and pressing "Delete" on the keyboard or by right-clicking on the entry and selecting "Delete" from the displayed menu.

	<b>Icons</b>	<b>Description</b>
	Save	Saves the bundle
	Preview the cover page	This will display a preview of the cover page based on the settings in the tab.
	Create a template from this bundle	This will convert the current bundle into a template which can be used as a template for other bundles to speed up their creation.
	Create a Spine Label	Will create a spine label based on the cover page settings

### **Colour Dialog box**

The Colour Dialog box allows you to select the colour you require for either a font or a section. Click on the colour you want to use and then click "OK" to select the colour. If you want to return without selecting a colour then click the "Cancel" button.

If you don't see the colour you require then click the "Define Custom Colours" button which will extend the dialog box and give you access to a palette where all available colours can be selected.

### **Create Bundle tab for Court Bundle**

The "Create Bundle" tab is where the bundle is generated using all the information entered by the user.

To create the bundle, click the "Generate" button. When this button is clicked there is a final check to see if there are any issues with the bundle, e.g. document does not exist. If there are, then a message is displayed giving a brief description of where the issues are. You are then given the choice to continue generating the bundle or viewing the messages. All warnings can be viewed on the "Warnings tab".

There are two types of bundles you can create and they are described below.





### **Temporary Bundle**

If you want to create a temporary bundle but not save it, you can leave the "Save as" box empty and the bundle will be created in a temporary pdf which once closed cannot be retrieved except by regenerating.

## Saved Bundle

You can create a saved bundle by entering a location in the "Save as" box. Simply click in the icon and then the "Save as" file dialog box will be displayed. Select the location and bundle name you wish to use and click the "Save" button. Nothing will be saved to this location until you click the "Generate" button to create the bundle. N.B. The "Save as" location will be stored with the bundle if you save the bundle at any point.

There are various options on this tab and they are described below:

Icons	Description
 Save	Saves the bundle
 Security settings for the bundle	Displays the "Add Security to Pdf document" form to allow you to define the security settings for the bundle.
 Set the watermark	Displays the "Set the Watermark options..." form to allow you to define a watermark for the bundle
 Create a template from this bundle	This will convert the current bundle into a template which can be used as a template for other bundles to speed up their creation.

The following options are available on the main form

Version Text	Any entered text will be added to each of the bundles page footers. The version text is positioned on the left side of the footer unless the page number has been put on the left in which case it is moved to the right. This field is optional
Include the version text on cover page?	Check this option if you want the version text to be added to the cover page(s).
Display bundle after generating?	After clicking the "Generate" button, if checked the generated bundle will be displayed in your pdf viewer. If this field is not checked then the bundle will still be created but the bundle will not displayed.
Print index pages in the bundle?	To include the index page(s) in the bundle check this field, to exclude the index from the bundle simply uncheck the field.



Print separator pages in the bundle?	To include the separator pages in the bundle check this field, to exclude the index from the bundle simply uncheck the field.
Duplex print ready?	To allow duplex printing, this is when you can print the bundle double sided, check the option.
Add security to the bundle?	To include any security settings you may have entered in the generated bundle you will need to check this option.
Include a watermark	To include any watermark settings you may have entered in the generated bundle simply check this option and as long as a watermark has been set it will be added to each page.
Send the generated document securely	By checking this option, when the bundle is generated, the resultant bundle is added as a send file in the "Secure Delivery" form ready to be sent to its' recipient. You can't check this option and redact at the same time.
Redact the bundle?	Checking this option will send the bundle after generation to be redacted. You can't check this option and secure delivery at the same time.