



CASELINES USER GUIDE FOR PARTIES & ADVOCATES

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INTRODUCTION

This User Guide has been produced to help Parties and their representatives get started with CaseLines and provides an overview of the most commonly used functions. The SDT dedicated CaseLines website offers Solutions and Quick Reference Guides which Parties and their representatives should refer to for additional support. CaseLines is regularly updated to improve user experience and therefore the following guide should be used as a starting point only as it does not reflect any changes made after February 2019.

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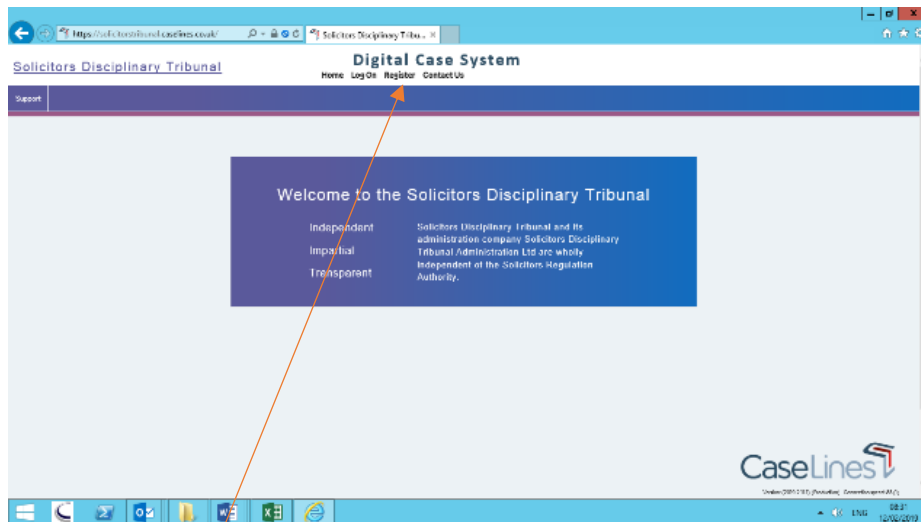
1. How to Access CaseLines

To access the CaseLines Home Page for the Solicitors Disciplinary Tribunal go to:

<https://solicitorstribunal.caselines.co.uk/>

To use CaseLines you will first need to register an account on the site

(A link to this website can be found on the SDT website home page.)



2. How to Register

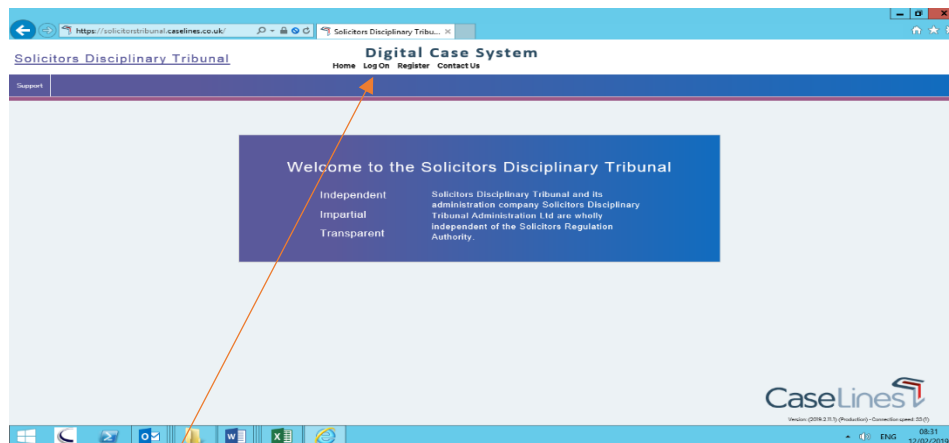
Click on the Register tab at the top of the Home Page.

Fill in your Account Information including:

- Title, First Name, Last Name
- Username (must be at least 5 characters long)
- Enter a valid primary email address - It is recommended that you choose to hide your email address
- Create a password which is at least 7 characters and contains an uppercase letter, a lower case letter, a character (e.g.!) and a number.
- Read the Data Protection details and the Terms and Conditions of Use.
- Tick the box to agree to be bound by the Terms and Conditions of Use.

Once you have filled in all the details correctly, the 'Register' button becomes active; click on it to register.

Once registered you will need to Log On every time you want to access cases on CaseLines.



3. How to Log On

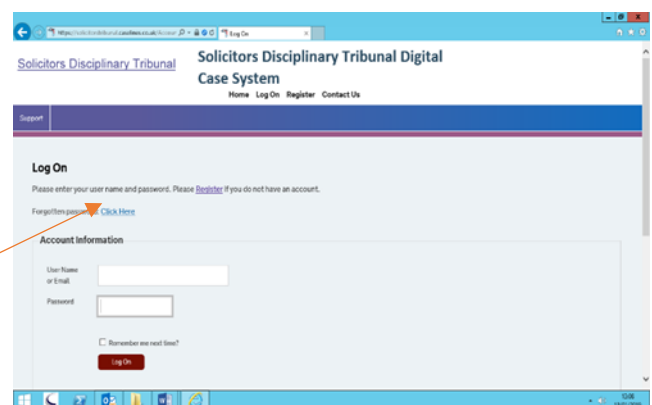
Click on the Log On tab at the top of the Home Page

Type in your email address or username and your password.

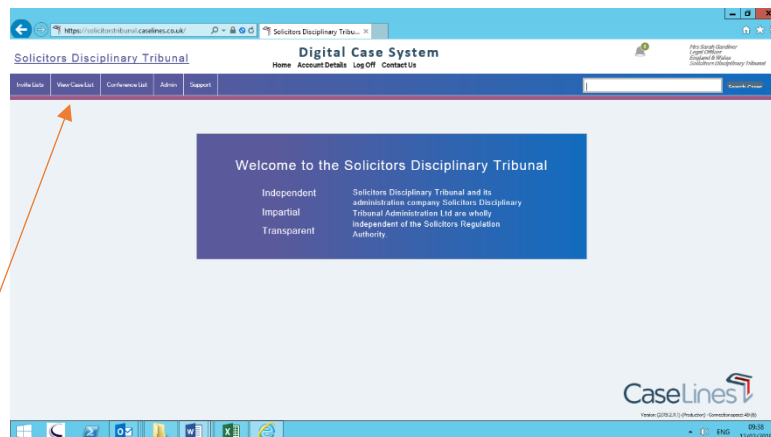
Tick the box marked 'Remember me next time?' if you are using your own device and if you want your browser to remember your login details. If you are using a court supplied laptop please do not tick the box to remember next time.

If you've forgotten your password, click Forgotten password: Click here.

You will then be required to submit your user name or email address; an email will then be sent to you containing a link to reset your password.



4. How to find your cases



To find the cases to which you have been invited Click View Case List located in the menu bar at the top of the webpage.

You will be presented with the case list containing all cases to which you have been invited.

The case list can be filtered using the case filter.

You can filter on:

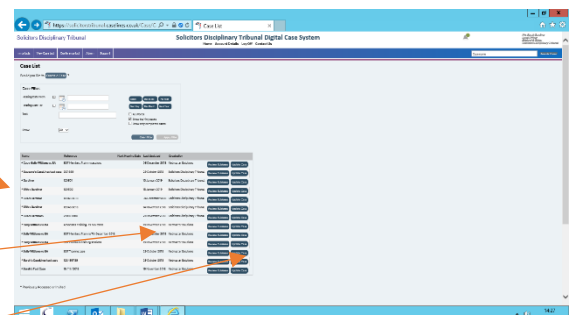
- Hearing Date
- Case Name or Reference (TEXT)
- Training Cases
- Completed Cases



Click Apply Filter to filter the case list.

Click Clear Filter to clear any search parameters.

All Cases to which you have been invited will appear below



Select the Case you want using Review Evidence Button to view the Bundle

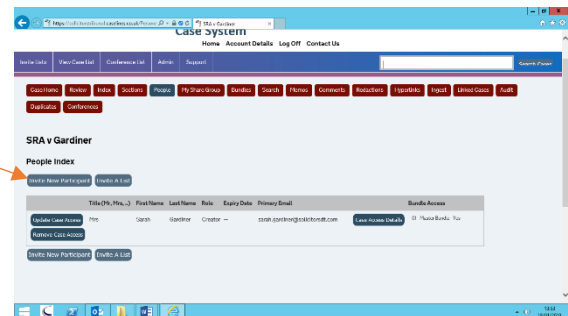
Or Update Case Button to make changes to the case such as Upload Documents or Invite people to the case.

5. How to invite People to the Case

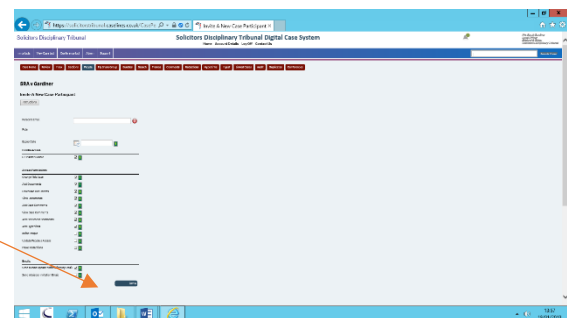
Click on the People tab



Click on Invite New Participant



Enter the Person's details and Click on Invite



It is also possible to invite a group of people at the same time by creating an invite list. For example you may wish to invite other members of staff who may be working on the case.

6. How to Create an Invite List

Click on Invite Lists tab at top of Home Page

This page will appear

Click on Create New Invite List



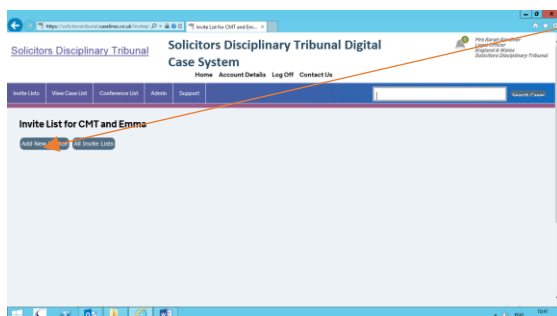
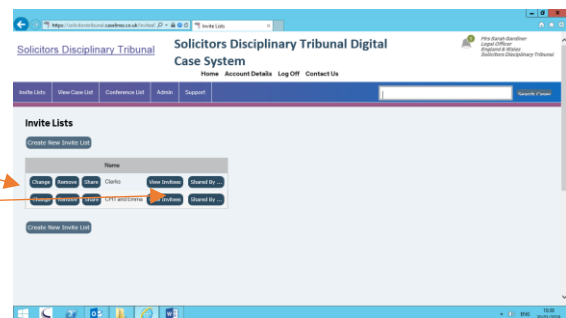
Enter the name of your group

e.g. "CMT and Clerks PA" or "Clerks"

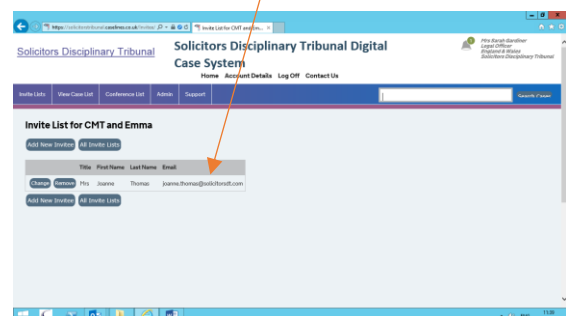
Click on Create List

The List of Invite Lists created will now appear.

Next add participants to the list – click on View Invitees



Click on Add Invitee then enter the invitees details and email. Do this for each person you want to add to the group. The list of names will appear as below

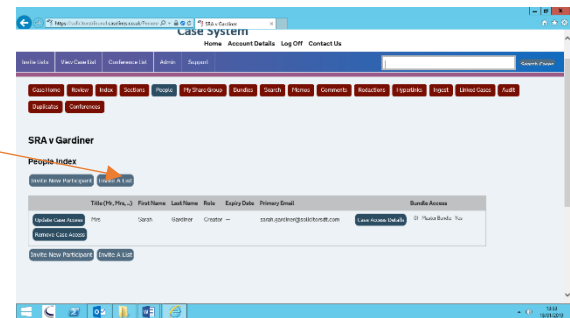


7. How to Invite a List of People

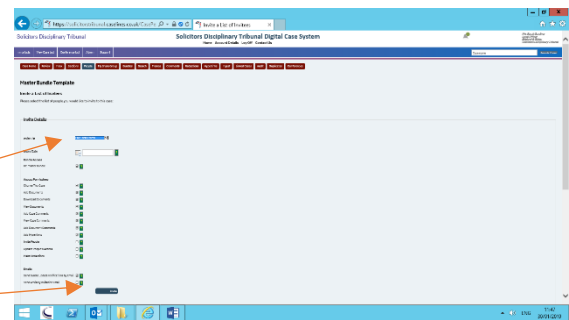
Click on the People tab



Click on Invite List



Select the list of people you want to invite.



Click on Invite

8. The Master Bundle

All documents uploaded to CaseLines will be automatically stored in the Master Bundle.

The Master Bundle is separated into the following Sections in compliance with the Protocol:

A: Application, Statement and Exhibits;

B: Respondent's Answer and Documents;

C: Applicant's Reply and Documents not previously filed;

D: Witness Statements;

E: Applications for an Order;

F: Directions/Memos/Orders/Decision Sheet;

G: Certificate of Readiness/Hearing Timetable/ Civil Evidence Act Notice;

H: Costs and Statement of Means;

I: Skeleton Arguments;

J: Copies of all authorities relied on;

K: Medical Reports;

L: Character References;

M: Relevant Correspondence;

Z: Late Submissions

9. How To Upload Documents to Master Bundle

Select Sections tab at top of Case Home Page

Select Master Bundle from Select Bundle Button

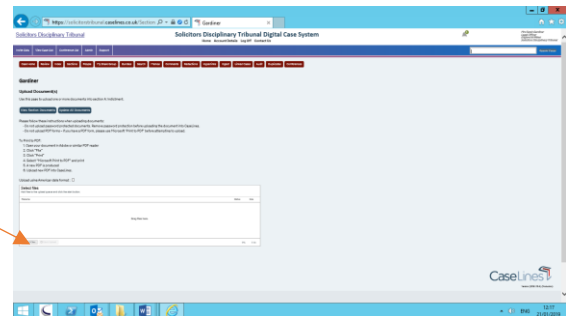


Select Upload Documents button for the required Section of the Bundle to which document is to be uploaded



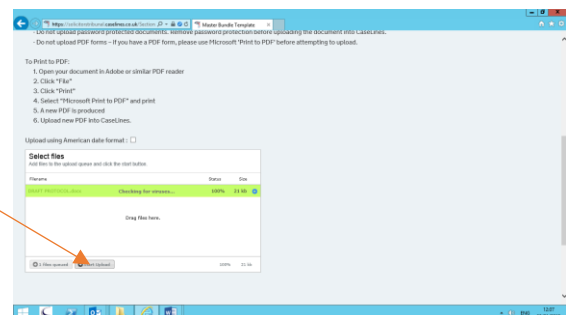
Click on Add Files

Choose the files to upload from the pop up box



Then click on Start Upload

The Files will then be uploaded to the Bundle Section of the Master Bundle



10. The Hearing Bundle

Click on Bundles tab at top of Case Home Page

Click on Bundles tab at top of Case Home Page

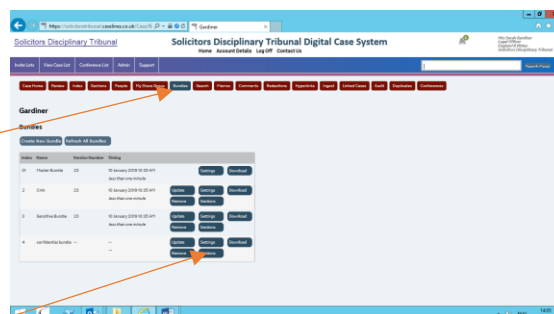


Each Hearing Bundle to which you have been invited will be listed and named so as to properly identify the nature of the hearing for which the Bundle is being prepared (for example, application for proceedings to be held in private 10/01/2019 or adjournment application 10/01/2019).

11. How to add documents from Master Bundle to Hearing Bundle

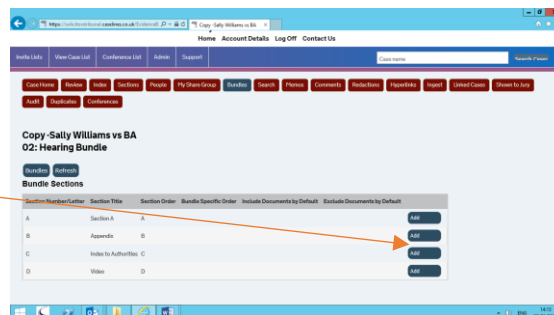
Once a Hearing Bundle has been created documents already uploaded to the Master Bundle can be selected to be included in the Hearing Bundle.

Click on Bundles tab to see a list of all Hearing Bundles created.



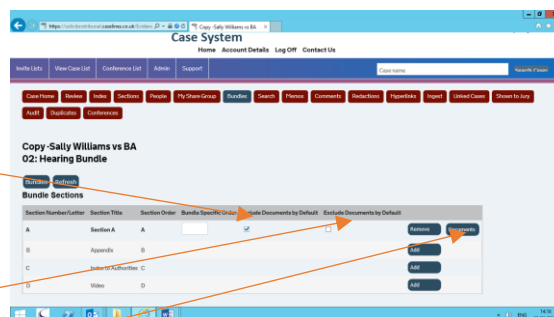
Click on Sections tab for the Bundle you want to add the documents to.

A list of the Master Bundle Sections will appear. Click on Add for each of the sections to be added to the Hearing Bundle



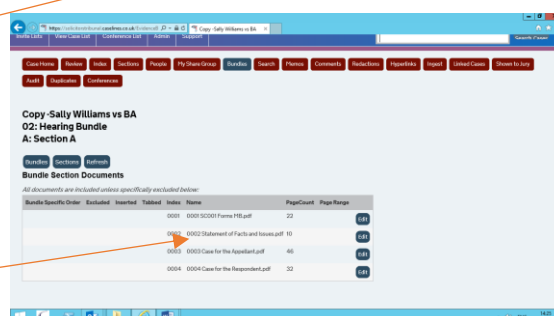
You can either add all the documents in that section by selecting Include Documents by default and then deselect any documents in that section not to be included in the Hearing Bundle

Or you can select specific documents from the section to be added to the Hearing Bundle by clicking on Exclude Documents by default and then choosing which of the documents in the section to be added to the bundle.



Click on Documents to deselect or select the documents from that section to be included in the Hearing Bundle

Click on each document to include or exclude from the Hearing Bundle as necessary



12. How to give access to the Hearing Bundle to people already invited to the case

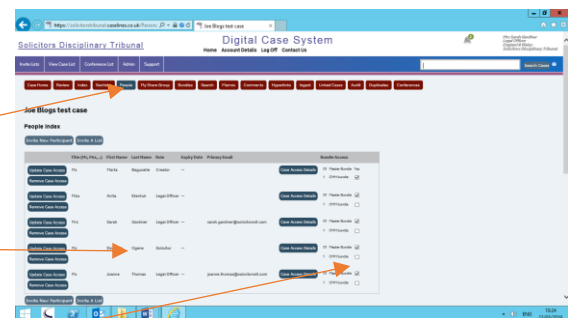
Once the Hearing Bundle has been created you will need to give anyone invited to the case access to the Bundle.

Click on People tab

A list of all people invited to the case will appear

The Bundles to which each person has access will be indicated by a tick

To give access to a particular Bundle select that Bundle for every person who requires access to it.

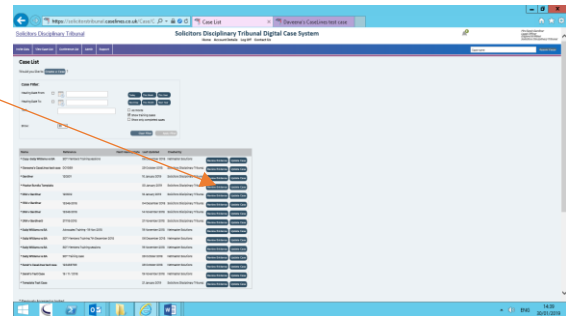


13. How to access the Hearing Bundle

The Hearing Bundle can be accessed either by clicking on the Review tab at the top of the Case Home Page



Or by clicking on Review Evidence on the View Case List page

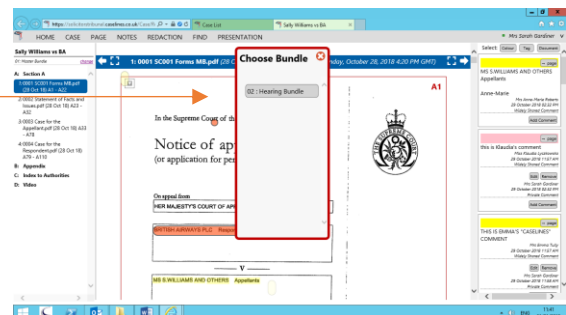


A new tab will open and you will be taken to the Bundle. If you have been given permission to access the Master Bundle and Hearing Bundles you will be able to select which Bundle you want to look at. If you have only been given permission to access a Hearing Bundle then that is the Bundle which will appear automatically.

To Select a Hearing Bundle or Master Bundle click on Change



A pop up box will appear listing the Bundles available. Select the Bundle required



14. How to navigate the Hearing Bundle

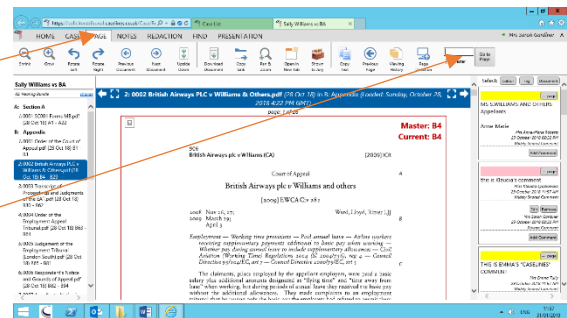
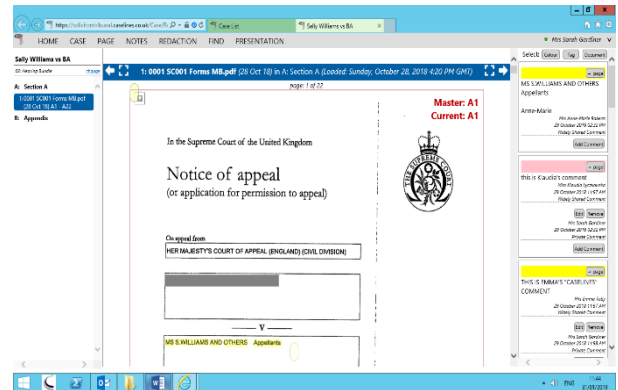
Bundle pages appear in the middle of the screen

Index to Bundle Documents appear down the left hand side.

Any Document comments made appear on the right hand side of the screen

The Bundle can be navigated in a variety of ways:

- scroll through using the arrow keys or the scroll bar down the side of the Document to navigate the Bundle in page order
- click on page tab and use any of the options to navigate to a particular document
- Click on Document required in Index on left hand side of screen to be taken directly to the start of the particular document
- Click on Go To Page in Page tab or Find tab and enter the page number required using Section Number and Page Number e.g. A22



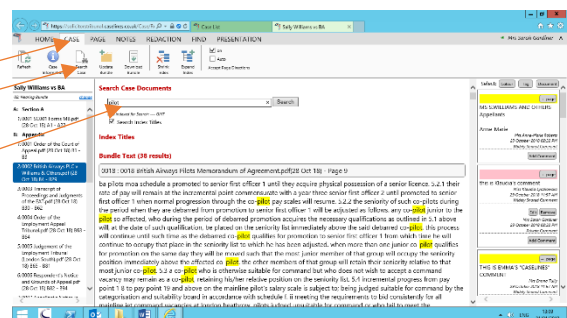
15. How to Search the Bundle

To search for a particular word or phrase when reviewing the Bundle click on Case tab

Then click on Search Case

Enter word or phrase required

All occurrences of the word or phrase will be highlighted



16. How to Highlight and Add Comments

To highlight text click on Notes from the tabs at the top.

Select the preferred option from the menu:

- Draw a Box – highlights a border around the text selected
- Draw a Filled Box – highlights all the text selected
- Highlight Text – highlights text freehand

Once you have selected your preferred option the cursor will become a black cross. Select the text to be highlighted as you would if you were selecting text to cut or copy.

A pop up comment box will appear. Add any comment you wish or leave blank and click “Save”

By default the comment will be private, only accessible by the person making the comment.

To share the comment with people in your share group select “Shared with my Share Group”

Click Save

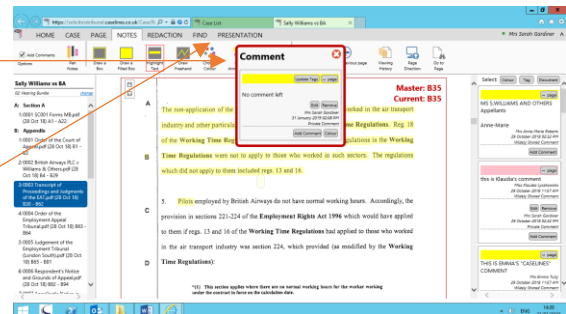
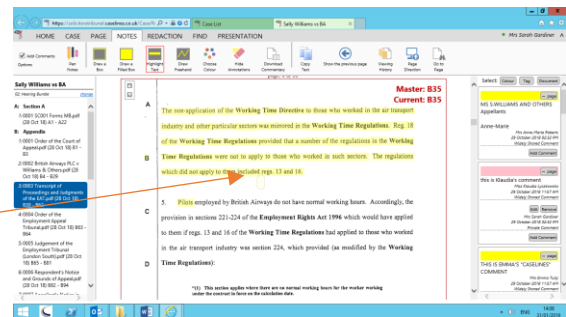
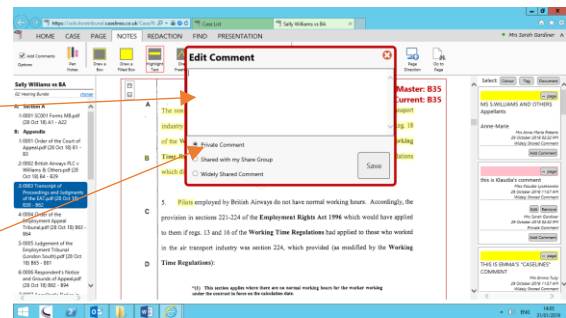
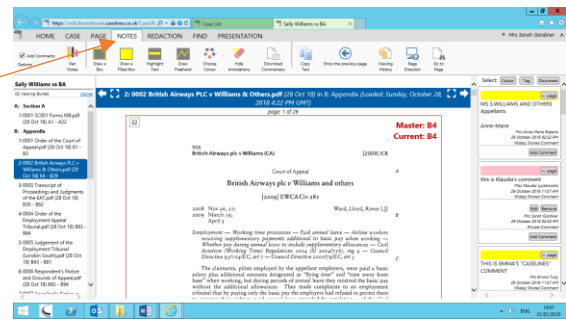
The text remains highlighted and an elongated bubble will appear to show a comment has been left

Hover over the bubble to access the comment or click on the bubble to read the comment in a pop up box

All comments will appear down the right hand side of the screen

The colour of the highlighted text can be changed by “Choose Colour” in the Notes tab

A pop up box will appear: choose a colour then click on the white cross to close the pop up box



17. How to Create a Share Group

Creating a Share Group will allow you to share any comments you make with those in your share group only. These comments will only be accessible by those in your Share group.

To create a Share Group click on My Share Group tab at top of the page.

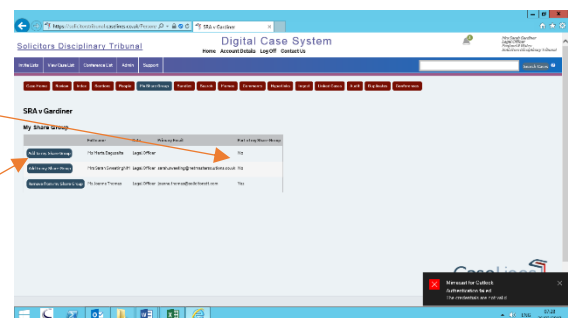
A list of everyone invited to the case will appear

Click on Add to my Share Group for each of the people you want included in your Share Group



You will see who has been added to your share group by "yes" appearing after their name.

A person can be removed from your share group by clicking on Remove from my share group



18. Court Presentation

During a hearing any party may issue a Page Direction to direct others in the court to a particular page of the bundle.

Click on Page tab

To Direct to a single page

Find the page you want others to look at then click on Page Direction. A pop up box will appear for anyone looking at the bundle inviting them to the page. Accept the request and the viewer will be automatically taken to that page.

To Direct to multiple pages

If a party wants to direct the court to a number of pages then click on Presentation tab at the top of the page

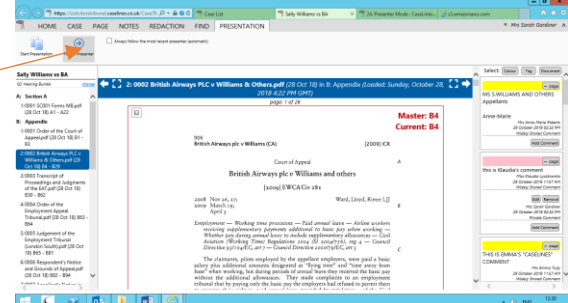
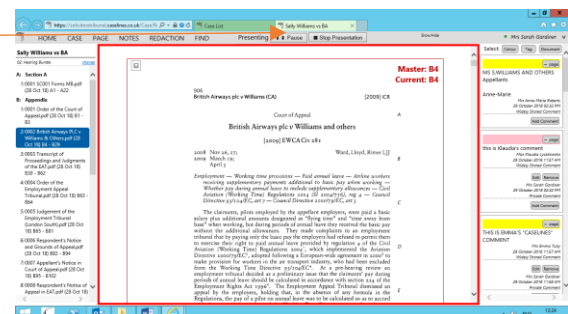
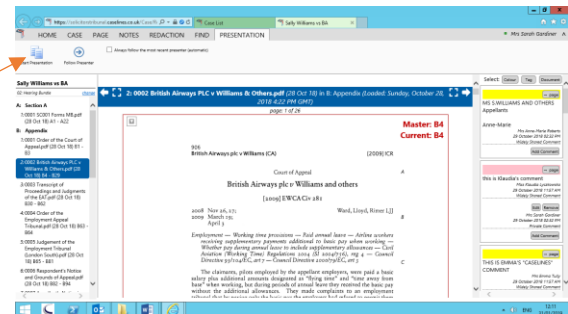
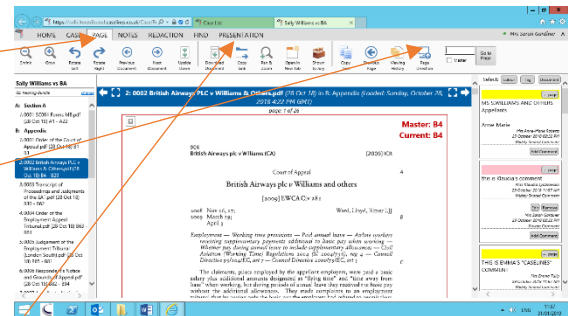
Then click on Start Presentation

The Presentation can be paused or stopped at any time

To Follow a Presentation

To follow a presentation initiated by someone else click on Follow Presenter and select the Presenter to follow from the pop up box

Following the Presenter can be paused or stopped at any time.



19. How to Download a Hearing Bundle

Click on Bundle tab at top of page

All Hearing Bundles created for the case will be listed.

Click on Download button for the Bundle you want to Download



You can download the complete Bundle or just the Index or just a Section of the Bundle.

Make your selection. The Bundle can be downloaded to a web page or as a word document which you can then save to your device.



Please remember a downloaded version of the Bundle will not be updated. If any updates are made to the Bundle you will have to download a new copy.

20. How to Share the Hearing Bundle Securely

You may want to share a complete version of the Bundle. This can be done securely through Case Lines.

Follow the Steps above to download the Bundle. Select the Bundle you want to share.

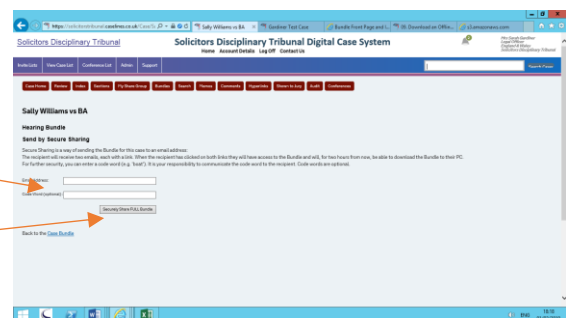


Click on Secure Sharing



Enter the email address of the person you want to share the Bundle with and follow the instructions for entering a code word.

Click on Securely Share Full Bundle



21. Additional Support and Quick Reference Guides

For additional support on anything not covered by this guide please refer to the online Caselines support. This can be accessed by clicking on Support at the top of the page



You will now be directed to the Solutions page where you can raise a ticket with any specific query directly to Caselines or search their solutions and quick reference guides.

