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Foreword

In the current crisis, remote working has become the new norm. Remote hearings are now taking place on a scale unimaginable just a few weeks ago. For the most current guidance, see the website established in late March 2020 with the blessing of the HM Courts & Tribunals Service at remotecourts.org.

With photocopiers and reprographics departments suddenly unreachable, to say nothing of the impracticality of circulating hard copy bundle additions at the last minute, we all need to be able to prepare an electronic bundle. Such ability is, however, not yet widespread.

This Guide

The following is a short guide for using the widely-available Adobe Acrobat Pro, which should produce a bundle compliant with the courts' most current directive on the topic in relation to e-bundling in the **Financial Remedies Courts** and Practice Direction 32, **paragraph 27**.

Best practice guidance on the content of bundles in the Commercial Court can be found in **Appendix 7 of the Commercial Court Guide**.

Step 1 – Install the Software. If you have not already, install Adobe Acrobat Pro (not Reader).

Step 2 – PDF Your Documents. You need to have everything you want in the bundle in PDF format. To the extent that they are not already:

» In the case of electronic documents, print to PDF.

It **may** be possible to skip this step and combine files (see Step 5 below) in their native formats. You will still need to give them bookmark-friendly file names (Step 3 below) and some files may need a bit of work first (especially Excel spreadsheets). I have not included this step because – depending on how your system is set up – it may not work or work with all file types. It is also a faff with emails which have attachments.

» In the case of hard copies, you will need to scan to PDF.

If you don't have a scanner, there is a very good iPhone/Android scanner called **Tiny Scanner**. Get the paid-for version, because it allows multiple pages. Don't get too close to the page(s) you are scanning – the flash is usually too bright if you do. It has a very good 'framer' in its workflow that you can use to make sure your pages don't include the carpet they were lying on. Set up a Dropbox folder or similar to make uploads easy, or just email the resulting PDF to yourself.

NB Unfortunately, *none* of what follows works with locked PDF files. (To see if a file is locked, open the left-hand pane as described in Step 7 below; if there is a padlock image, then the file is locked.) Print and scan is the only solution here (printing to PDF will not cure the problem).

Step 3 – Name your PDFs. Give the PDFs a name that is short and starts with a number, e.g., "01 - Claim Subs". The reason for this will become clear, but in essence you need to give each PDF a name corresponding to its tab number and (a short version of) its description.

Step 4 – Collect your PDFs. Get all the PDFs you want in the bundle into a separate folder.

Step 5 – Combine your PDFs. Select them all (CTRL+a works in Windows). Right-click and select "**Combine Files in Acrobat**". In the **Combine Files** window that opens:

- » Click the **List View** button (much easier to work with than **Thumbnails**).
- » Click the **Options** button and ensure that “**Always add bookmarks ...**” is checked. (It’s sticky, which means that once you’ve checked it, it should stay checked, so you should only need to do that once.) Click OK.
- » You can re-arrange the order of the documents within the PDF if you want, but if they all have names beginning with a number, then they should already be in the right order.
- » Then Click **Combine**.

Step 6 – Save your Bundle. Clicking **Combine** in the previous step will generate what is called a “Binder”, but it’s just another PDF. Save it with a useful name like “HrgBdl 310320”. (If you want to be super-organised, the best dating format to allow sorting by name but in date order is of course YYYYMMDD, so, e.g., 20200323 for 23 March 2020.). Make sure you keep saving your file as you work with it!

Step 7 – Viewing and Working with Bookmarks. To view the bookmarks, open the left-hand pane (click on the arrow halfway down the left-hand side of the window) and then the bookmark icon (second one down). Clicking on the relevant bookmark will take you to that spot in the PDF. You can add more bookmarks and arrange them into hierarchies – and even colour-code them.

Step 8 – Page Rotation. If you need to, because they’re upside down or landscape documents are on their side, you can rotate pages using the Page Thumbnails view. Select the page(s) to be rotated in the left-hand margin, right-click and select Rotate Pages.

Step 9 – Pagination. You can give the resulting PDF printable page numbers by clicking on the Edit PDF button on the right-hand side of the window, and then the Header and Footer button. Click where you want to add the page number and then on Insert Page Number. Fairly easy to use, but make sure you make the page numbers at least 12-point font size. (You can save your settings, too, so that they are quicker to apply next time.)

NB Sometimes you may need to **add a blank page**, so that individual documents start on an odd-numbered page of the PDF - which may not be the same as the printable page number, if you have added more pages or an index. This can, e.g., be necessary if you are printing double-sided – the default under PD 32 para 27.15. You can do this by clicking on the **Page Thumbnails** button on the right-hand side of the window; then right-click on the page where you want to add the blank. Select **Insert Pages > A Blank Page**. You will be given the option to add it before or after the page you clicked on.

Step 10 – Make it Searchable. If you need to make it word-searchable (always a good idea), click on the **Scan & OCR** button on the right-hand side and follow the prompts.

NB The resulting file may well be quite large (over 100MB is common) and cannot therefore be shared by email. For sharing (internally and externally), use Citrix Files (or your favourite file-sharing website – ensuring that you comply with data protection requirements).

Step 11 – Adding More Pages. It is all-too-common to need to insert additional pages. You can do this by adding the inserts as further PDFs to the file by (for example):

- » Clicking on the **Page Thumbnails** button on the right-hand side of the window.
- » Dragging and dropping the additional file into the relevant place in the list of pages.
- » NB –
 - i) **Bookmarks.** This will usually (though sadly not always) add the filename (and any bookmarks it contains) at the **bottom** of your bookmarks list in the existing file, regardless of where in the file you have inserted it. To get the new bookmark(s) into the right place, just drag them there. (If the added file’s name and bookmarks have not carried across, you will have to insert them manually.)
 - ii) **Pagination.** If the additional file is going to mess with the bundle’s existing (printable) pagination, paginate it as above **before** you add it. Obviously, add the number of the page it is going to be added after (and a full stop) as a prefix to the automatic number, e.g., “102.”

Step 12 – Making PDF Page Numbers Match Printable Ones. This makes use of a feature called “Page Labels” and will make navigating the document while viewing it on a screen *much* easier.

If you *have* added printable pagination to the file, use the “Page Labels” feature to make that pagination correspond with the PDF page no. (i.e., the one displayed in the bar above the document). Say you want the index to the bundle to be numbered i, ii, ... :

- » In the **Page Thumbnails** view, select the pages you want to number like that (click on the last one, hold down the **SHIFT** key and – holding it down – click on the first one; release **SHIFT**).
- » Then right-click on one of the selected pages and select **Page Labels**. The resulting dialog box will allow you to apply a different numbering to those pages.
- » You can use the same technique to relabel inserted pages so that they become, e.g., 302A- 302N.
- » You can then navigate to the relevant page just by typing that number into the box above the document. (Note, though, that these numbers will *not* be used if you paginate the document in the manner described in Step 9 above.)

NB Page Labels has a bug/feature: if you add a file immediately after some “relabelled” pages, it will automatically apply the relabelling to those new pages (which is fine, if you’re expecting it), but it *won’t* import the new file’s bookmarks.

James M Turner QC



“His work is sharp and focused, and his advocacy has a deservedly excellent reputation.” (Chambers UK, 2020)

James specialises in cross-border commercial disputes in international arbitration, energy, shipbuilding, offshore construction, shipping and banking.

“A skilled tactician who can be entrusted with anything” (Chambers UK), as an advocate – with “a deservedly excellent reputation” (Chambers UK) – he appears most often in arbitration, before tribunals operating under LCIA, ICC, HKIAC or LMAA Rules, as well as in ad hoc matters. His Court work is almost exclusively in the Commercial Court and on appeals up to and including the Supreme Court.

Well-known for his ability “to crunch through the details of a very technical case” (Legal 500), much of James’s work requires the co-ordination of a range of expert specialisms, ideally suited to his down to earth approach and team-building skills that make him a “great pleasure to work with” (Who’s Who Legal). Reflecting the invariably international character of his practice, James has extensive experience in dealing with foreign law and multi-jurisdictional disputes. He has a particular eye for appreciating and addressing cultural barriers in international arbitration.

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