How to create a binder step by step

Getting started

1. Create a Binder Project

2. Add folders and sub-folders

3. Import folders, sub-folders, and documents from iManage

4. Import folders, sub-folders, and documents from Windows File Explorer

5. Choose files to convert to PDF

6. Rename documents

7. Organize documents within the Binder Project

8. Create, view, and edit the Cover Page

9. Preview document content

10. Edit PDF content - Send to Organizer Project Mode to edit PDF content

11. Send back to the Binder Project and delete the previous version

12. Create the binder

13. Add links to other documents and web pages

14. Freeze pagination and add new documents

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Create the binder

1. From the Back Stage View, select New > Binder > Binder Project from Template.

2. Select Family Court Template from the Server Templates drop-down.

3. Type the name for the binder in the Name field.

4. Click Create Project to save the binder to the required location.

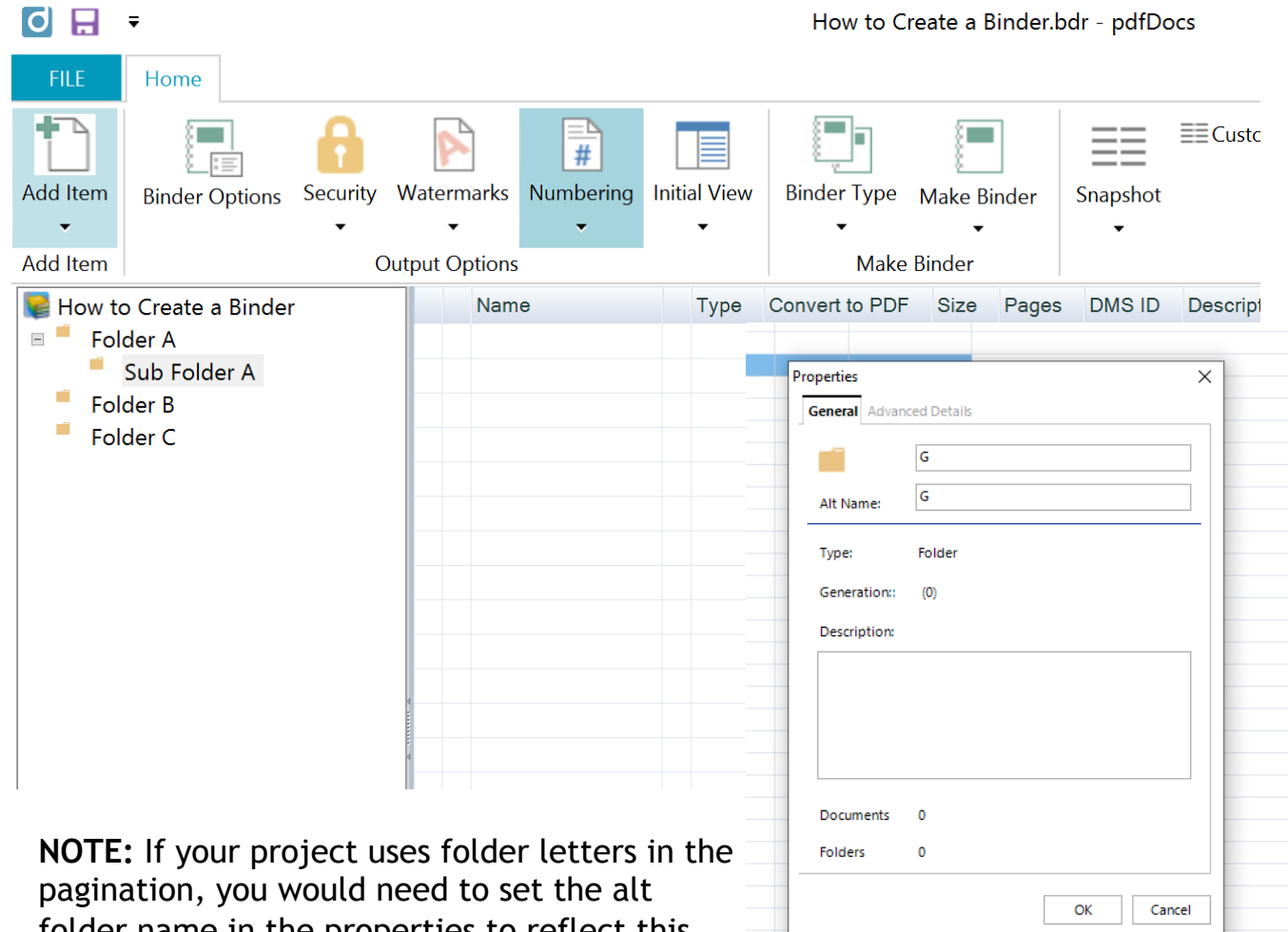NOTE: We would always recommend saving your project as you go along.

Create eBinders. Effortlessly.
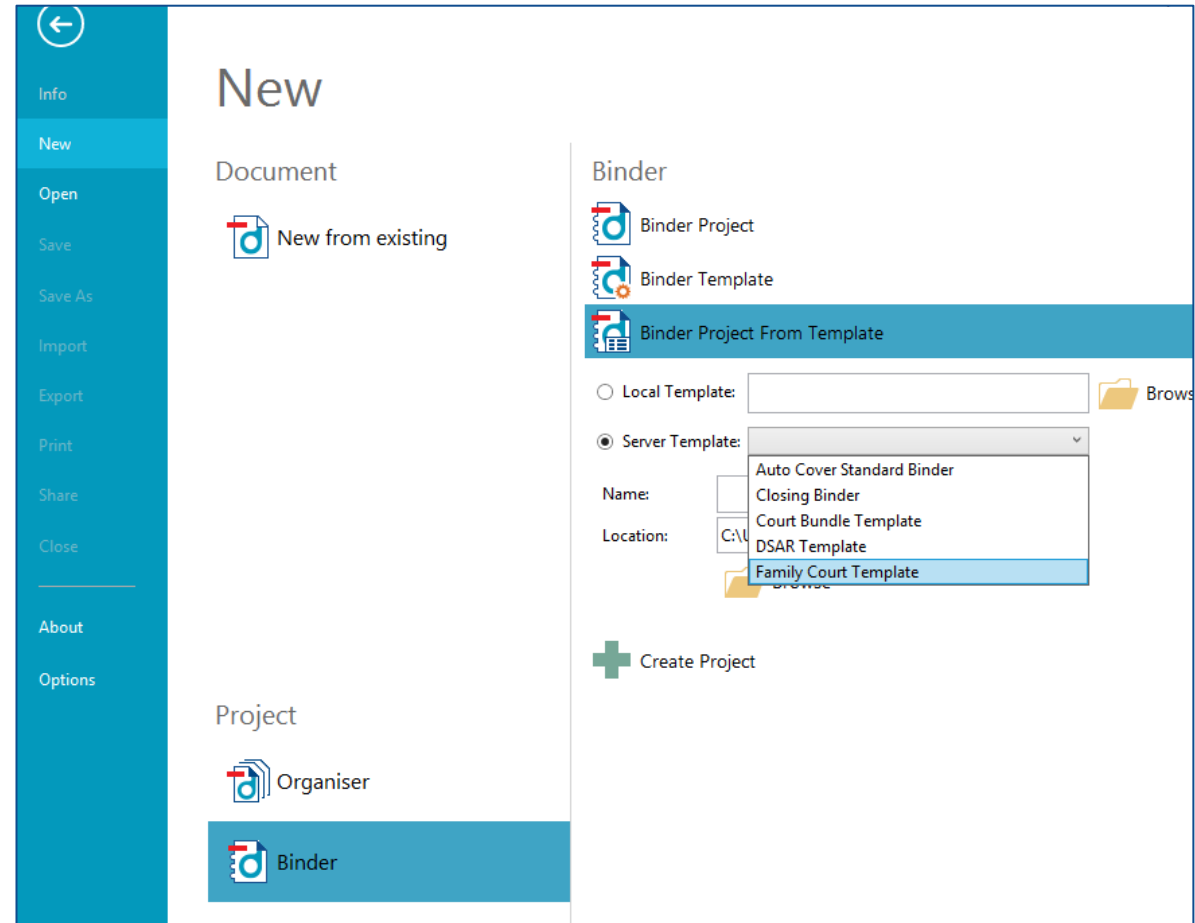
Add folders

We recommend setting up a folder and optimizing files before importing into a Binder Project.

Organizer or Single Document mode can be used to remove incorrect pagination, apply redactions, compress large files, OCR, rotate pages and convert to PDF.

Click the Add Item button on the toolbar, and select My Computer.

1. From the Add Item to Binder dialog box, select between a Folder or Sub-Folder.

2. Right-click or click into the folder to rename it.

3. Right-click on the folder and select New Folder to create a sub-folder.

How to Create a Binder.bdr – pdfDocs

FILE   Home

Add Item   Binder Options   Security   Watermarks   Numbering   Initial View   Binder Type   Make Binder   Snapshot   Custo

Add Item   Output Options   Make Binder

How to Create a Binder
- Folder A
  - Sub Folder A
- Folder B
- Folder C

Name   Type   Convert to PDF   Size   Pages   DMS ID   Descript

Properties   ✕

General Advanced Details

G

Alt Name: G

Type: Folder

Generation::   (0)

Description:

Documents   0

Folders   0

OK   Cancel

NOTE: If your project uses folder letters in the pagination, you would need to set the alt folder name in the properties to reflect this.

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Add/import documents and folders from iManage

- Open an existing Binder Project or create a new one.
- Go Home > click Add Item icon.
- In the Add Item to Binder dialog > select iManage Work > and choose to add a folder, sub-folder, or document and click OK.
- Navigate to the location of the folder/documents > select those you wish to add > click Open

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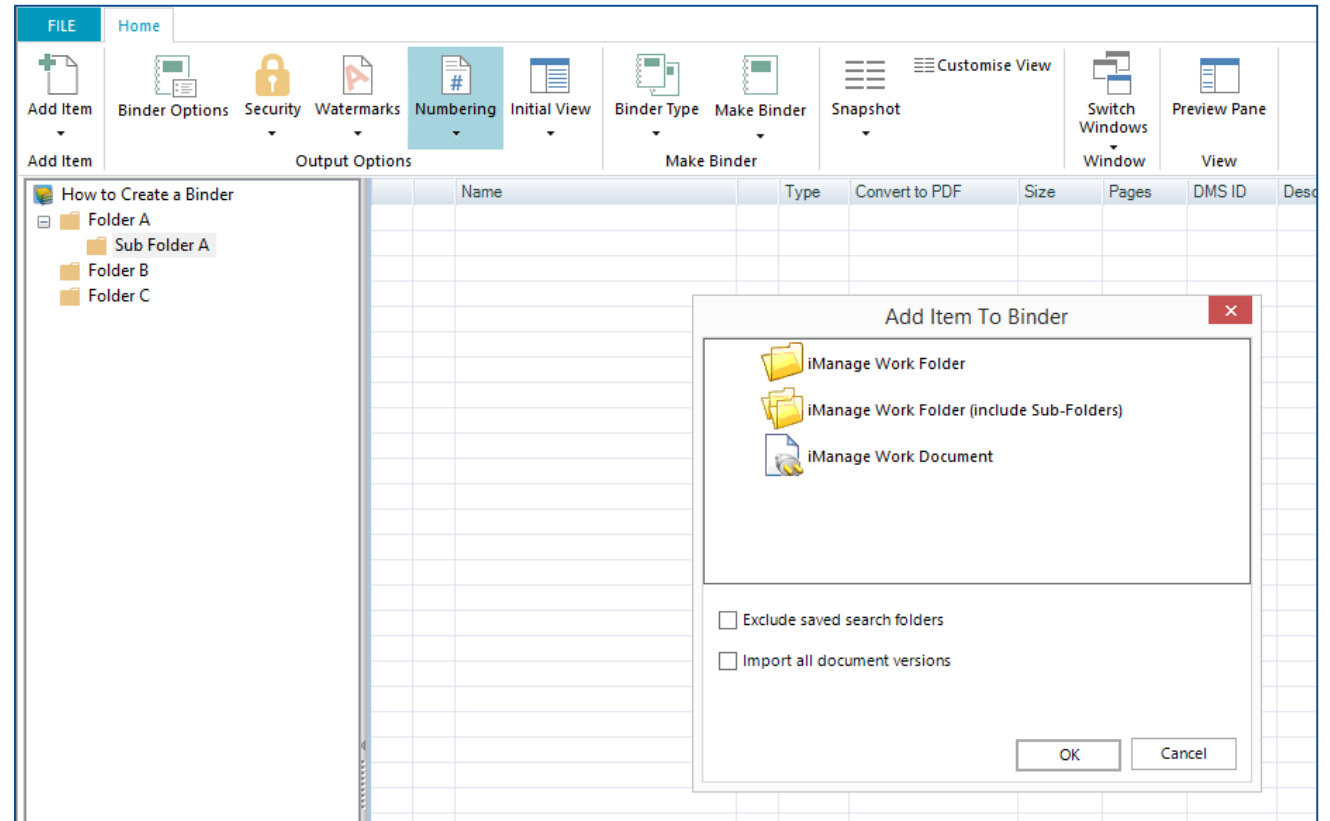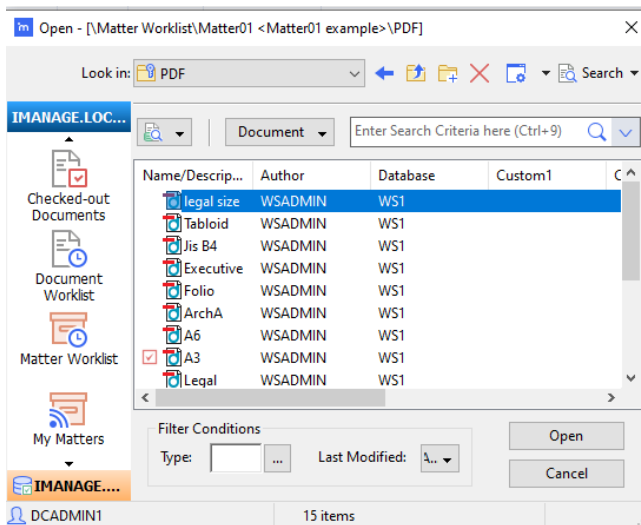
Import from Windows File Explorer

If you drag and drop documents from Windows File Explorer, they will import in the order they were selected (providing the cursor is at the top of the list).

See how the list on the right is ordered Z-A. If dragged from the top file Proposed Quality Bonds Mod.DOC, they will be imported in this order.

The result: identical file structure.

NOTE: Custom metadata fields can be created. Speak with your IT department if you wish these to be set up (Doc Dated from iManage etc).

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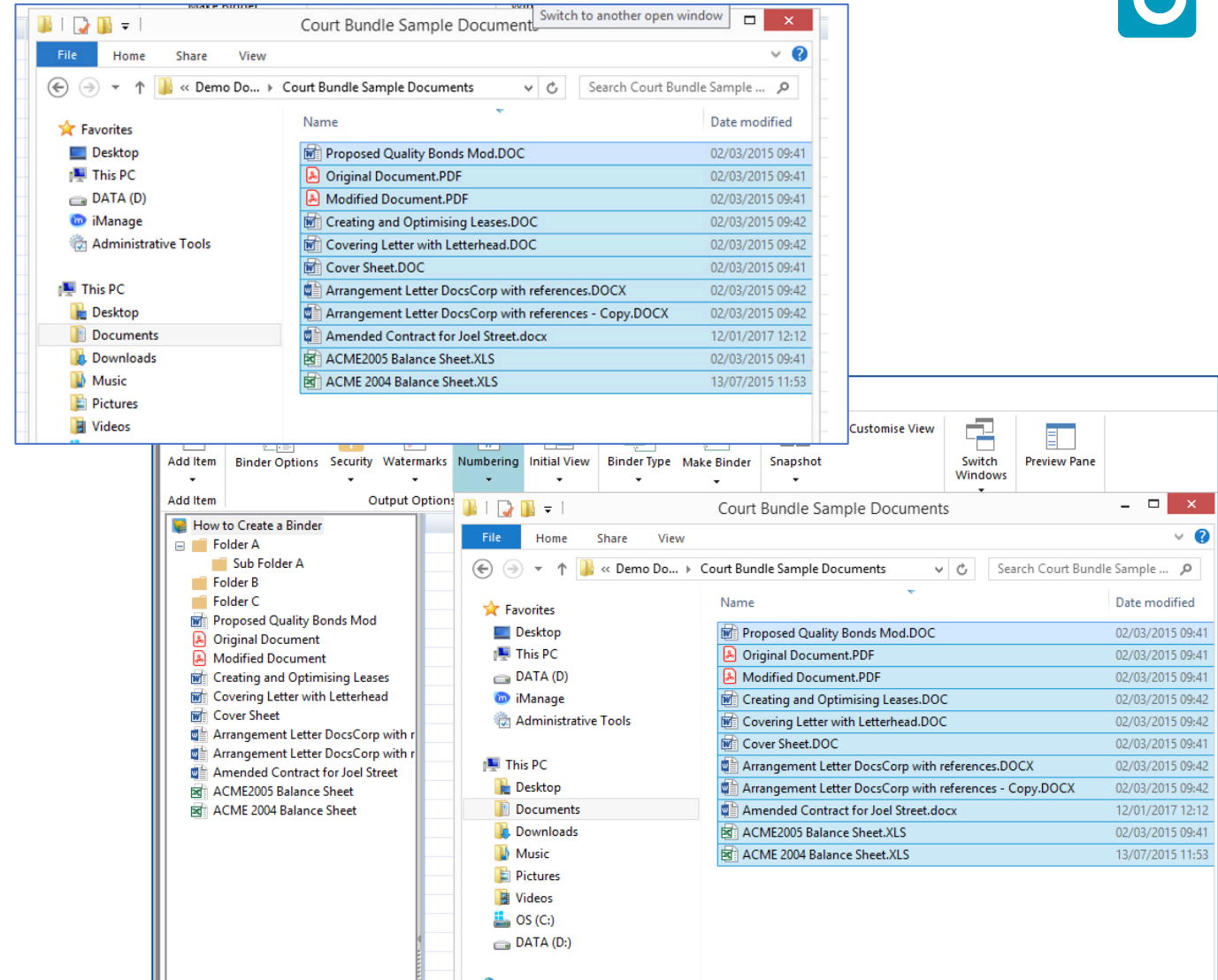
Convert to PDF

pdfDocs will automatically convert supported files to PDF when producing a binder, including:

- Emails

- Excel

- Publisher

- Word

- PowerPoint

- AutoCAD

- Text Documents

- Visio Drawing

- Graphics files (JPG, PNG, GIF)

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Rename files

1. Rename files by right-clicking on the file name and select Rename

Or

2. Click into the file name and rename.

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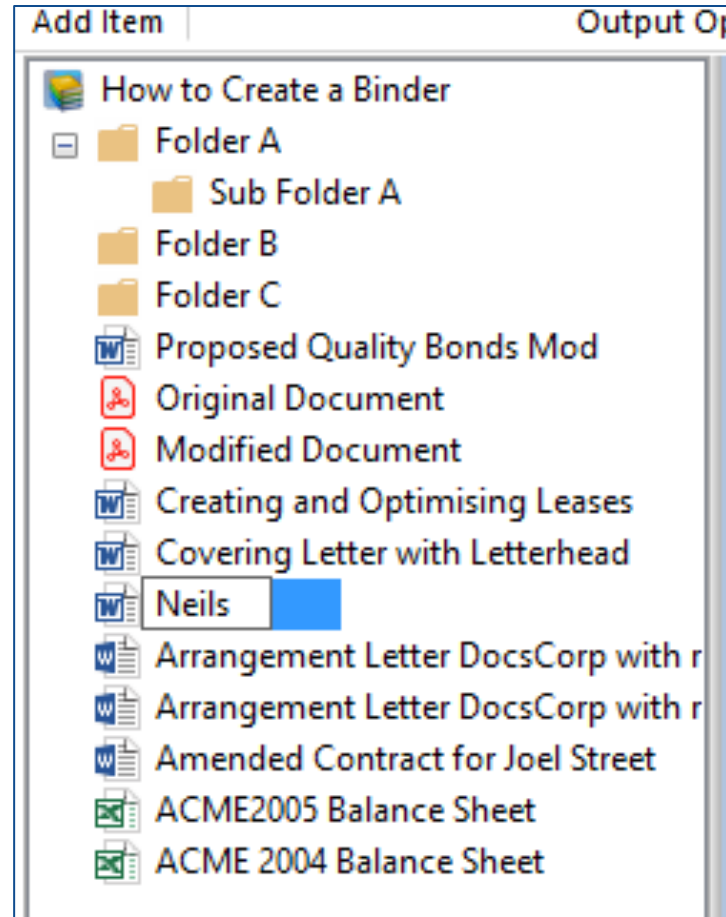
Organize files

1. **Moving** files within the **Binder Project**, or into a folder is a simple **drag and drop**.

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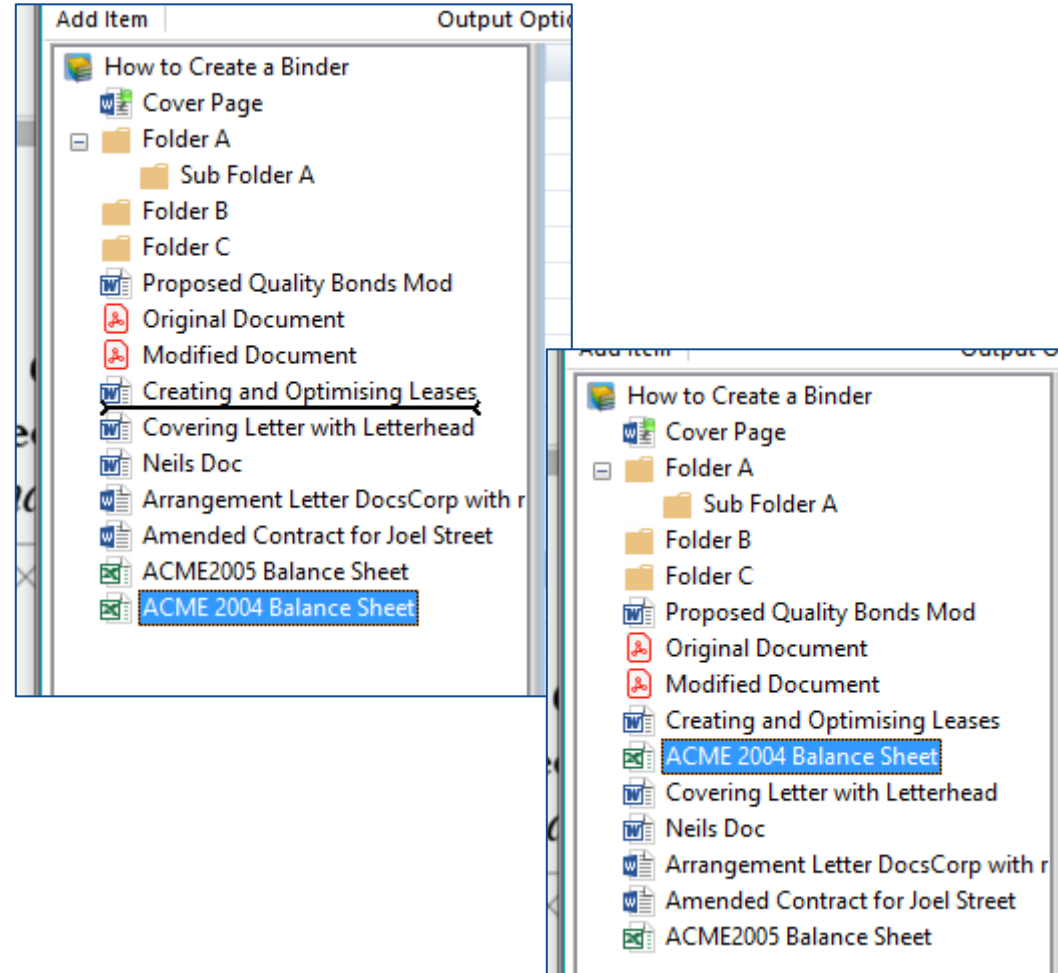
View the Cover Page

1. Select a document in the binder that will be the Cover Page document.

2. Right-click on the document and select Mark as Cover.

3. To view or edit the document, right-click on it and select View/Edit Item.

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Preview a document

1. To preview the contents of any document in the Binder Project, click the Preview Pane button on the toolbar.
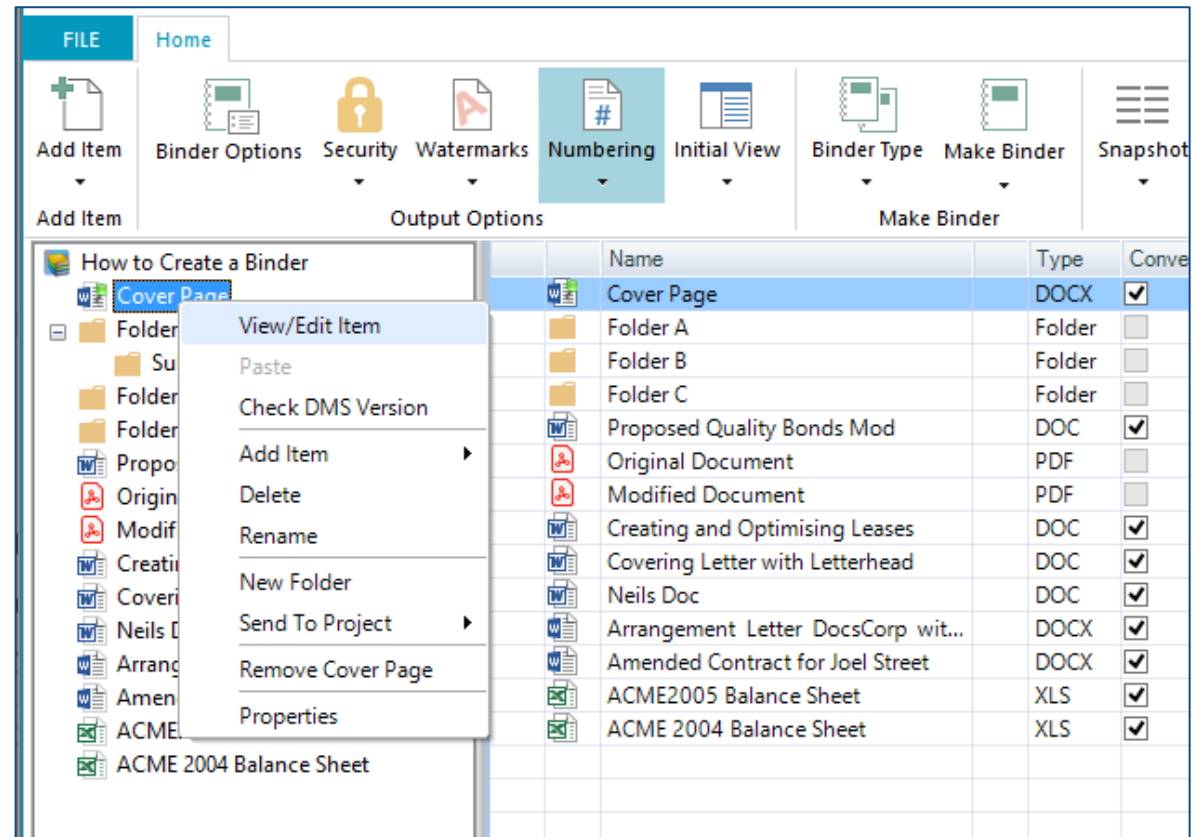
Edit a PDF

1. If you need to amend a page/file, right-click on it and select Send to Project.

2. Choose which Project to send it to.

Once in the Project, you can mark up, redact or OCR the document.

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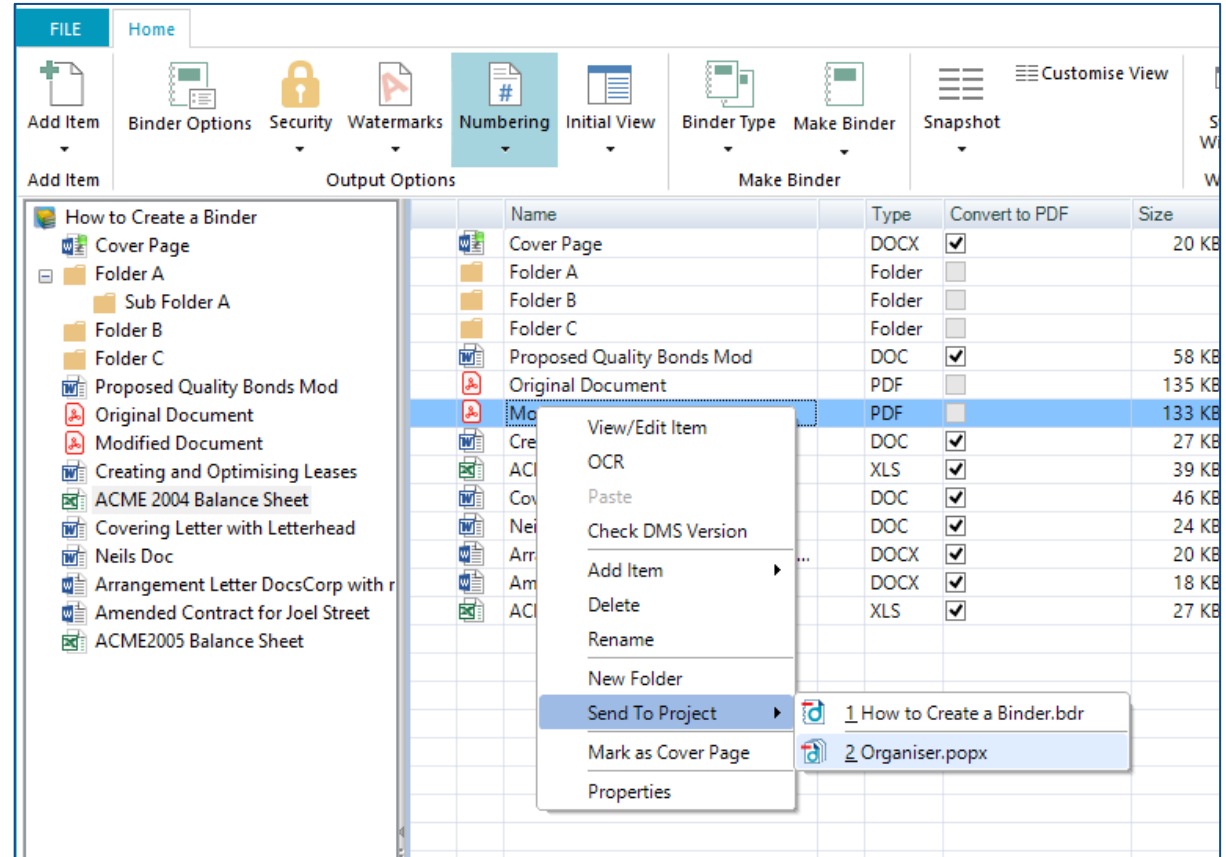
From Organizer to Binder

When you have finished editing, you can send the document back to the binder.

1. From the Home tab, click the Send to Project button.

2. Select the appropriate Binder Project option.
    The file will be added to the binder.

3. Remove the previous version of the file from the binder.

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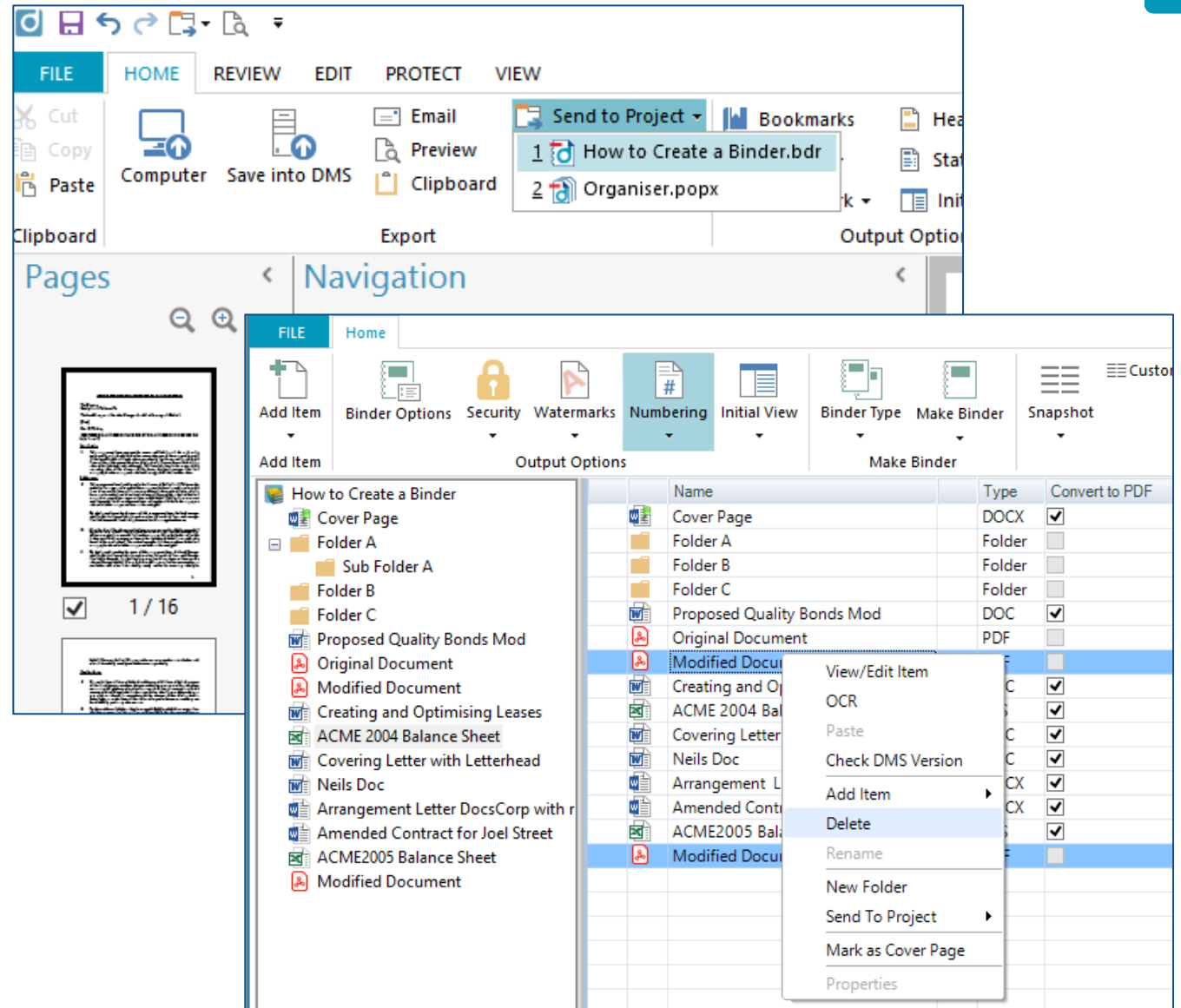
Create the binder

1. To generate the binder, click the Make Binder button on the toolbar.

2. Choose between a Single PDF Binder, Multi-PDF Binder or a Cover Page Binder only.

3. Click OK.

Create eBinders. Effortlessly.
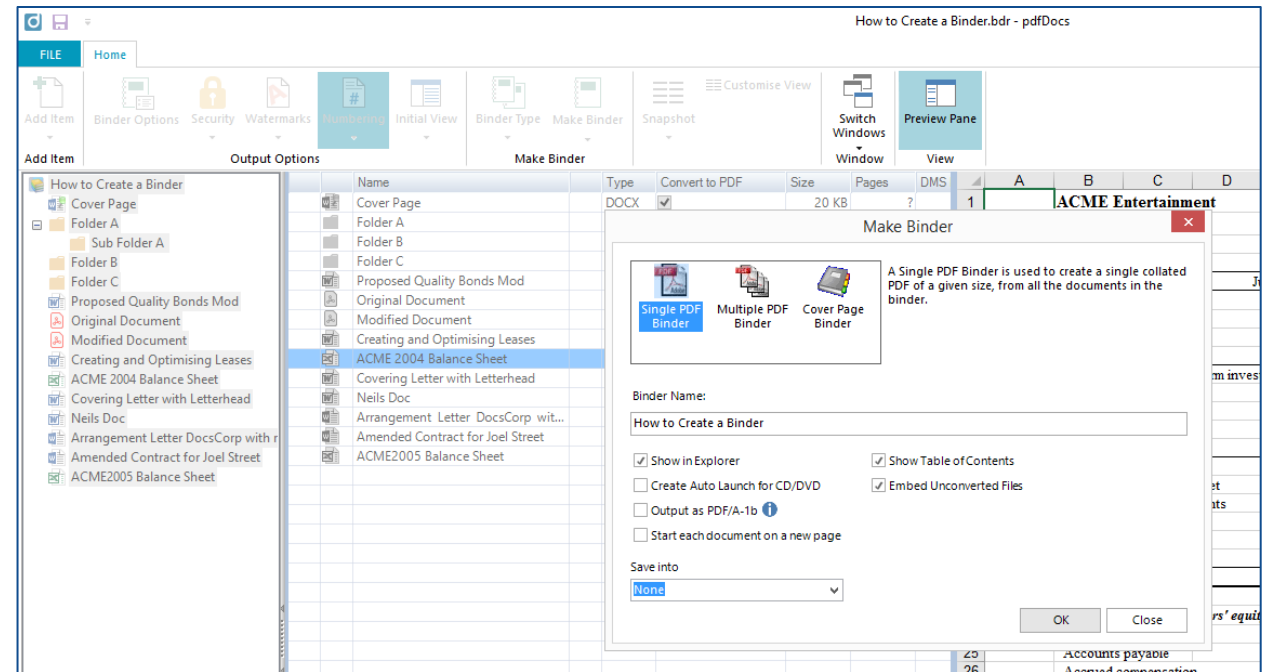
Add links to documents

Bookmarks and the Table of Contents are automatically generated when the binder is created.

If you need to add links to other documents or web pages, this should only be done when the document is final.

Do this in pdfDocs using the Link tool in either Single Document or Organizer Project mode.

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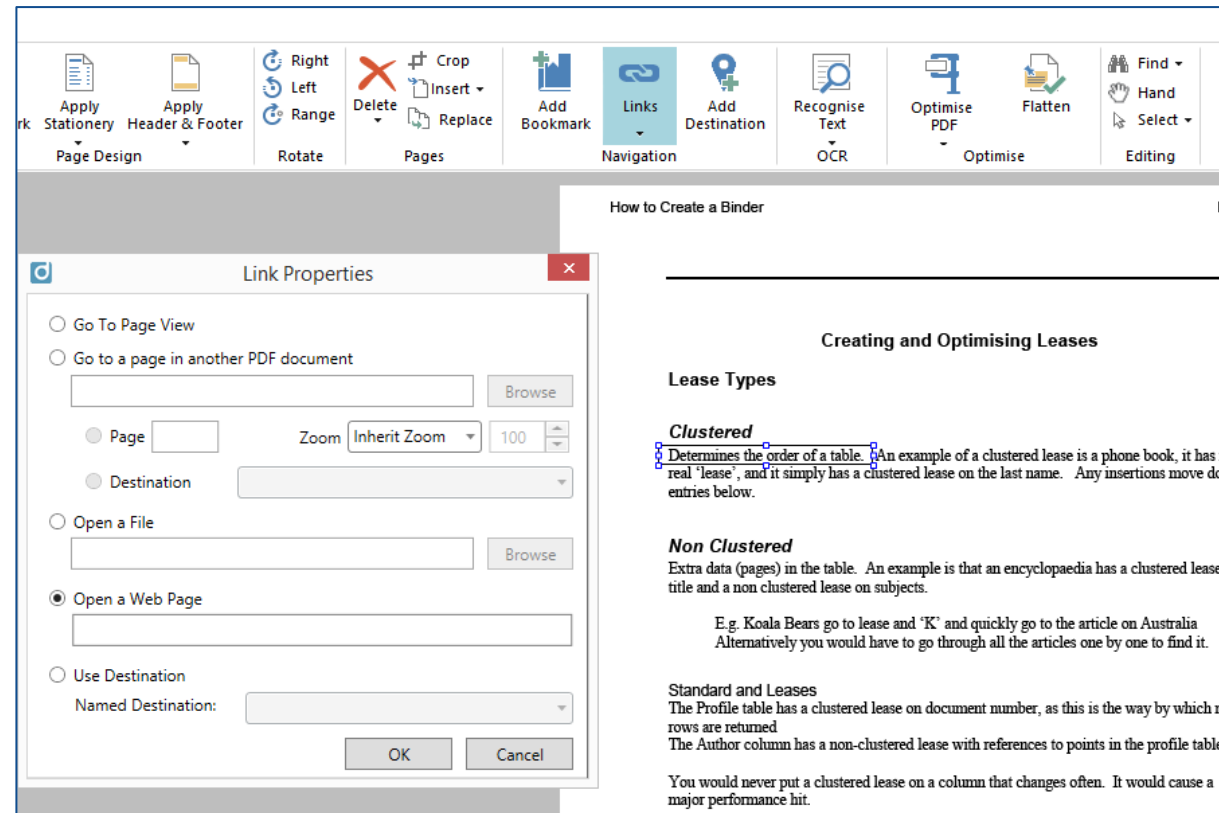
Use Snapshot

If you wish to add documents later to a binder and not affect the original pagination, just click Snapshot and this will freeze the Binder Project's layout, allowing you to add files with extended numbering (A1.1, A2.1 and so on).

Appendix

Binder Template Examples

CASE NO : 12345689/888

ICHESTER FAMILY PROCEEDINGS COURT

TER OF FRED FLINSTONE (DOB 15.09.04)

THE COUNCIL OF THE CITY OF MANCHESTER

<u>Applicant</u>

-and-

Paul Darby

<u>First Respondent</u>

-and-

Andrew Smith

(Acting by the Children's Guardian)

<u>Second Repondent</u>

INDEX TO BUNDLE

Section A - Applications and Orders

1.	A1 - A 1	ACME 2004 Audit Report Appendix B
2.	A1.A1 - A 1.A176	Firm Manual
3.	A2 - A 3	ACME 2004 Tax Return Appendix B (Fe

Section B - Statements and Affidavits

4.	B1 - B 1	Minutes of June 15th 2004
5.	B1.A1 - B 1.A1	Engagement Letter re_ Dispute
6.	B1.A2 - B 1.A5	Defendant's Request for Production of D
7.	B2 - B 3	ACME 2004 Consolidated Work Papers

Section C - Experts, Childrens Guardian and Other Report

8.	C1 - C 2	ACME 2004 Tax Return Appendix C (St
9.	C3 - C 3	ACME Corporate Brochure By Chris

Section D - Other Documents

10.	D1 - D 1	Ajuba LLP Brochure
11.	D2 - D 2	By-Laws

Section P - Prelimiary Documents

12.	P1 - P 1	Minutes of June 15th 2003
13.	P2 - P 2	Articles of Incorporation
14.	P3 - P 10	Complaint at law

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Appendix

Binder Template Examples

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