

CASELINES TIPS AND TRICKS

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updated: June 4, 2022

1. Use **UPDATE CASE** to get into your matter: it is quicker than REVIEW EVIDENCE and will get you right to the case menu.


Case List

Case Filter:

Hearing Date From:  Today This Week This Year

Hearing Date To:  Next Day This Month Next Year

Case name / reference:

Show number of cases in case list: 

☐ All Words
☒ Show training cases
☐ Show closed cases
☐ Order by Listing Number

Clear Filter Apply Filter

Name	Reference	Listing Number	Next Hearing Date	Last Updated	Created By
* Family Law Training Case	FS-PLACEHOLDER			May 12, 2022 03:24 PM	SCJ - Central East Region - Ontario Superior Court of Justice

Review Evidence Update Case

2. Once into your case, the **INDEX** menu is a great place to start: if you are not in the Bundle that you want to be on, remember you can click on the grey SELECT BUNDLE to move to another bundle.

Contents

Bundle: 02: Motion Select Bundle

3. The documents in a Bundle will show in the Index. Remember that you are seeing the CURRENT CaseLines page numbering here, instead of the MASTER numbering. You have two options to see a document: Clicking on **VIEW** will open a new Tab (super helpful) and see the document within CaseLines, showing both MASTER and CURRENT numbering:

View Document

[View all section documents](#)

Section: A: Applicant Documents


Document: 0001: Form 15 - Motion to Change

Date: December 13, 2021

Date Loaded: December 13, 2021 02:19 PM

[Next >](#) [Move](#) [Remove](#) [PDF](#)

Page 1 of 6: [|<](#) [<<](#) [page 1](#) [>>](#) [>|](#) [Hyperlink](#) [Copy Link](#)

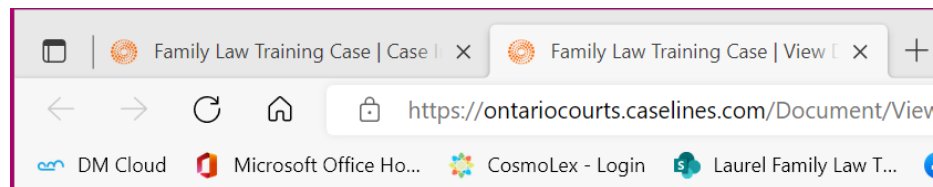

SEAL
Applicant(s)

Superior Court of Justice
(Name of Court)
at 361 University Avenue, Toronto, ON M5G 1T3
Court office address

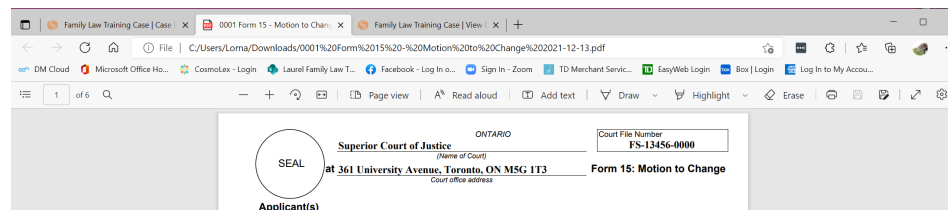
Form 15: Motion to Change
Master: A1
Current: A1

Form 15: Motion to Change
FS-13456-0000

If you want to go back to the INDEX menu, just click on the previous Tab on your browser:



Clicking on PDF will allow you to open the document as a PDF and download on to your desktop if you want, or just view the PDF in the browser:



- From the main case Menu, use **SECTIONS** to upload and rename/reorder documents. Remember you can click on the grey SELECT BUNDLE button once you are in the SECTIONS menu to change bundles if you need to:

Case Home Review Index **Sections** People My Share Group Bundles Search Notes Hyperlinks Upload Transfer

Family Law Training Case

Sections

Bundle: 02: Motion [Select Bundle](#)

Index	Name	Section Order	Document Ordering	Level
A	Applicant Documents	001		Normal
B	Respondent Documents	005		Normal

View Documents View Notes Upload File(s) Update All Documents

5. **UPLOADING FILES** is easy. Just determine the party you need to upload files for and then Click **UPLOAD FILE(s)**:

A	Applicant Documents	001	Normal	View Documents	Update All Documents
				View Notes	Upload File(s)

Then look about half-way down the page to the big empty white space under **SELECT FILES**. You can either Click on files from your desktop and drag them over and dump them in the white space, or you can Click on **ADD FILES** to pick the file you want to upload from your directory/desktop:

Upload File(s)

Bundle: 02: Motion [Select Bundle](#)

[Upload File\(s\)](#) Upload bookmarked PDF into a single section Upload eDiscovery production file

Select Section: A - Applicant Documents

Uploading to Section: A - Applicant Documents

Upload using American date format : ☐

Restricted : ☐

Please note if a file is restricted it will not display in sub-bundles unless the sub-bundle has been configured to show restricted files. This can be configured in the bundle settings.

Select files
Add files to the upload queue and click the start button.

Filename	Status	Size
Drag files here.		

[Add Files](#) [Start Upload](#) 0% 0 kb

[Update All Documents](#) [View Section Documents](#)

Once you have your file/files sitting in the SELECT FILES white space, Click on **START UPLOAD**. You will know the file uploaded if you see 100% in the status column beside the file:

Select files
Add files to the upload queue and click the start button.

Filename	Status	Size
Factum - Respondent H. Harold - 18-JUN-2021.pdf	100%	360 kb

100% 360 kb

bonus tip: CaseLines does not like files over 500 pages!

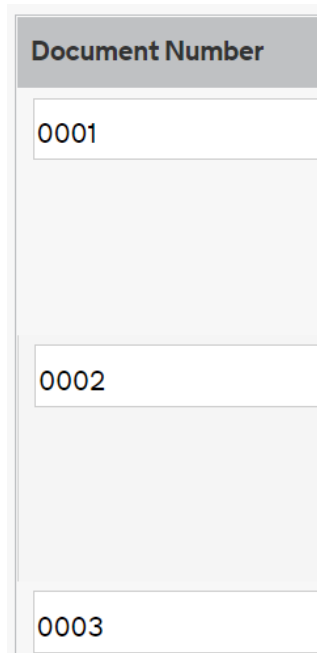
- Re-naming and re-ordering documents is next. If you are in your UPLOAD FILES(S) screen, Click **UPDATE ALL DOCUMENTS** just below the white SELECT files space:

Here is where the fun starts! You can do a lot of great organizing in the UPDATE ALL DOCUMENTS screen.

To change the **DOCUMENT TITLE** or **DOCUMENT DATE** just Click and type. Don't worry if the field is kind of greyed out. As soon as you Click there it will turn white and let you type. If you have used the naming protocol that the Court has instituted you shouldn't have to make any changes but this is your opportunity to ensure that it is done property, especially the document date (if you don't use the naming protocol your document may upload with the date at the time you upload, instead of the date on the document).

To change the order in which the document will show on the INDEX, Click in the **DOCUMENT NUMBER** field and change the number. Keep a 4-digit protocol, but otherwise change the numbering as you wish. CaseLines numbers documents by the sequence of uploading, so if you want your Notice of Motion to show up before

your Affidavit, but you uploaded your Affidavit first, just change the Notice of Motion DOCUMENT NUMBER from 0002 to 0001 and change the Affidavit DOCUMENT NUMBER from 0001 to 0002:



The screenshot shows a vertical list of document entries. At the top is a grey header bar with the text "Document Number". Below this are three white input fields, each containing a four-digit number. The first field contains "0001", the second contains "0002", and the third contains "0003". The fields are separated by light grey background blocks.

bonus tip: if there is a document I want the presiding judge to find quickly in a bundle, I number it 0000. That way it is always at the top. You can number as many documents as you want 0000. For trials, I like the Opening Trial Statement and the Draft/Proposed Order to both be 0000 in the Trial Documents Bundle, for example.

bonus tip: if are not in the UPLOAD FILE(S) window when you decide you want to change the DOCUMENT NAME or DOCUMENT DATE or DOCUMENT NUMBER, you can get there from the **SECTIONS** menu. Once you are in the SECTIONS window, Click **UPDATE ALL DOCUMENTS** and you will be there!



A dark grey button with rounded corners and a white border. The text "Update All Documents" is written in white, sans-serif font.

There is no "save" feature when you re-name or re-order your documents, so don't look for it! Feeling worried that all of your good work didn't stick? No problem. After you are done, Click the **INDEX** menu to check that the documents are re-named/re-ordered as you want.

Case Home Review Index Sections People My Share Group Bundles Search Notes Hyperlinks Upload Transfer

Family Law Training Case

Update All Documents

A: Applicant Documents **Documents**

Click on an entry to edit. Changes are saved automatically.

Document Number	Document Title	Document Date	
0001	Form 15 - Motion to Change	December 13, 2021	Included: <input checked="" type="checkbox"/> View Inserted: <input type="checkbox"/> Move Tabbed: <input type="checkbox"/> PDF Restricted: <input type="checkbox"/> Remove

Case Home Review **Index** Sections People My Share Group Bundles Search Notes Hyperlinks Upload Transfer

Family Law Training Case

Reference FS-PLACEHOLDER

Category General

Description

Contents

Bundle: 02: Motion [Select Bundle](#)

A: **Applicant Documents** (4 documents, 68 pages, 0 minutes)

Document Number	Document Title	Document Date	Page Range	View	PDF	S	T
0001	Form 15 - Motion to Change	December 13, 2021	1:A1 - A6	View	PDF		
0002	Form 35.1 - Affidavit in Support of Claim for Custody or Access (Beyonce)	December 03, 2021	2:A7 - A14	View	PDF		
0003	Factum - Respondent H. Harold -	June 18, 2021	3:A15 - A41	View	PDF	S	T
0004	Factum - Respondent H. Harold -	June 18, 2021	4:A42 - A68	View	PDF	S	T

7. The **PEOPLE** menu is a great place to go to see who your Judge may be. You may see a big, long list of participants in your cases. It is usually the Trial Coordinators, judicial assistants and MAG staff at a courthouse who need access. But if you press **CTRL + F** on your keyboard in this screen, a little FIND menu will pop up. Type in Judge and press ENTER. You should find all of the Judges assigned to your matter. If you have had other appearances, the Judges who heard those appearances will also still likely show up.
8. Some of lawyers prefer preparing for appearances without having to scroll through documents on CaseLines but want the page number references. It is easy to do this through the **BUNDLES** Tab:

Home Invite Lists View Case List View Hearings Support

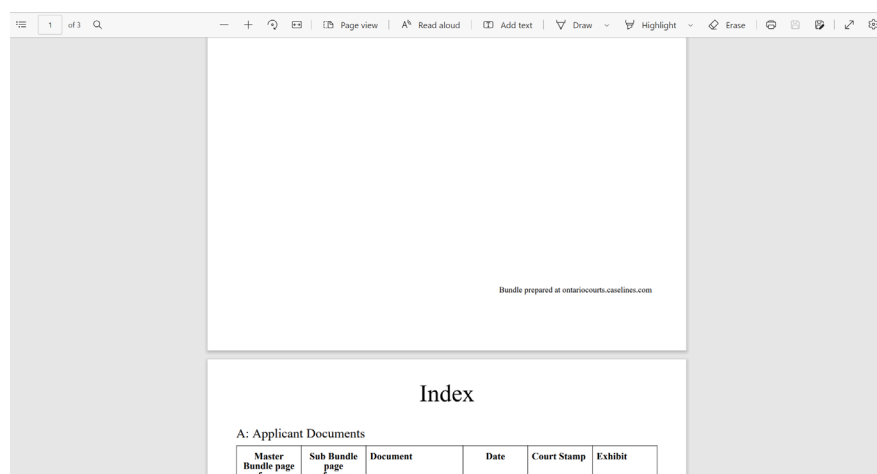
Case Home Review Index Sections People My Share Group **Bundles** Search Notes Hyperlinks Upload Transfer

Once you are in the BUNDLES menu, find the Bundle you want to download and Click **DOWNLOAD** on the right hand side of the screen. Now you have some decisions to make. Do you want to download the COMPLETE BUNDLE or the BUNDLE INDEX. Even if I don't want the COMPLETE BUNDLE I always want the BUNDLE INDEX on my desktop as a great quick reference point. Click on **DOWNLOAD BUNDLE INDEX** to start:

02 : MOTION - MAY 26, 2022

Front Page Index	Bundle Parts PDF	Secure Sharing
Document Indexes: <input checked="" type="checkbox"/>	Download Complete Bundle (28.0 Mb)	Secure Sharing
Page Numbers: <input checked="" type="checkbox"/>	Download Bundle Index (50 Kb)	
Consecutive Numbering: <input checked="" type="checkbox"/>	Download 001 A1 to A27 (2.8 Mb)	
Inserts Only: <input type="checkbox"/>	Download 002 B1 to B94 (27.8 Mb)	
<input type="button" value="Web"/> <input type="button" value="Word"/> <input type="button" value="CSV"/>	<input type="button" value="Page Map CSV"/>	

The BUNDLE INDEX will pop up as a PDF to download in your browser. I use Microsoft Edge as my browser. If you Click on Open File below the Index the PDF will open in a new Tab. You can then Click Save to save the BUNDLE INDEX to your desktop:



bonus tip: do NOT panic when you see the first page blank. This is (annoyingly) how the download always generates. Scroll to the second page and you will see

the Index. Once you download to your desktop you can use the ORGANIZE PAGES menu in AdobeDC Pro to delete that first page.

The great thing about the BUNDLE INDEX is that it will give you the MASTER and CURRENT page numbering as well as the DOCUMENT NAME and DATE:

Index

A: Applicant Documents

Master Bundle page reference	Sub Bundle page reference	Document	Date	Court Stamp	Exhibit
A1 - A6	A1 - A6	Form 15 - Motion to Change	December 13, 2021		
A7 - A14	A7 - A14	Form 35.1 - Affidavit in Support of Claim for Custody or Access (Beyonce)	December 03, 2021		
A15 - A41	A15 - A41	Factum - Respondent H. Harold -	June 18, 2021		

If you want the entire bundle of documents uploaded for an appearance, Click on **DOWNLOAD COMPLETE BUNDLE** from the Bundled menu. Just like the DOWNLOAD INDEX option, you will see a blank first page once you open or save the COMPLETE BUNDLE, so don't worry!

With this option, you get the INDEX and you also get all of the DOCUMENTS. The CaseLines MASTER numbering will be on each page of the documents in red, and if you want to move around the bundle with a bit more ease you can Click on the BOOKMARKS Tab on the left-hand side of the screen to quickly access each document:

The screenshot shows the CaseLines interface. On the left is a 'Bookmarks' sidebar with a list of documents: Front Page, Index, A: Applicant Documents, 1: Form 15 - Motion to Change (13 Dec 21)(A1-A6)(A), and 2: Form 35.1 - Affidavit in Support of. The main area displays the document 'D: Office of the Children's Lawyer Documents' with sub-sections 'E: Intervenor Documents' and 'F: Third Party Documents'. At the bottom, there is a court stamp area. It includes a circular 'SEAL' placeholder, the text 'Superior Court of Justice' with '(Name of Court)' below it, and the address 'at 361 University Avenue, Toronto, ON M5G 1T3' with 'Court office address' below it. To the right, there is a box for 'Court File Number' containing 'FS-13456-0000' and a red 'A1' next to it. Below this box is the text 'Form 15: Motion to Change'.

9. Working on a Factum and want hyperlinks to a document on CaseLines? Easy-peasy! From the **INDEX** menu, click on VIEW beside the document you want to hyperlink:

View Document

[View all section documents](#)

Section: A: Applicant Documents


Document: 0001: Form 15 - Motion to Change

Date: December 13, 2021

Date Loaded: December 13, 2021 02:19 PM

[Next >](#) [Move](#) [Remove](#) [PDF](#)

Page 1 of 6: [|<](#) [<<](#) [page 1](#) [>>](#) [>|](#) [Hyperlink](#) [Copy Link](#)

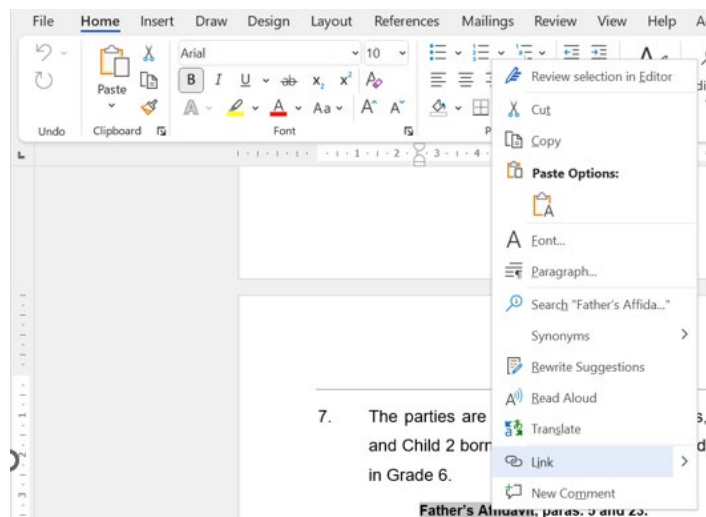

Seal

Superior Court of Justice
(Name of Court)
 at 361 University Avenue, Toronto, ON M5G 1T3
Court office address

ONTARIO
 Court File Number **Master: A1**
 FS-13456-0000 **Current: A1**
 Form 15: Motion to Change

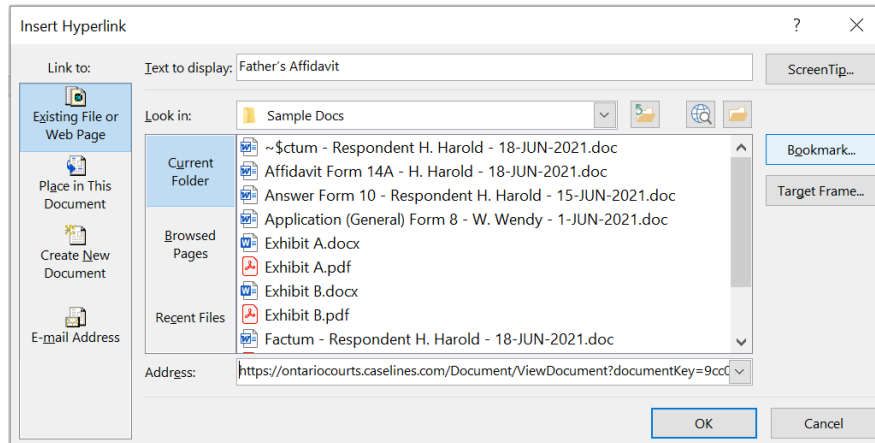
Now Click **COPY LINK** just above the document. A pop up will appear, asking you to copy the link to the Windows clipboard by pressing CTRL + C on your keyboard. If the link is blue, go ahead and press CTRL + C. If it is not blue, click in the field and highlight the entire link and then press CTRL + C. Once you have done this, Click OK.

Now go into your Factum. I like doing this in Word. Highlight the area you want hyperlinked (so if you have copied the Affidavit, find the place in your Factum where you have referred to the Affidavit and click to highlight the Affidavit reference. Once highlighted, Right-Click on your mouse to access the menu:



Select LINK.

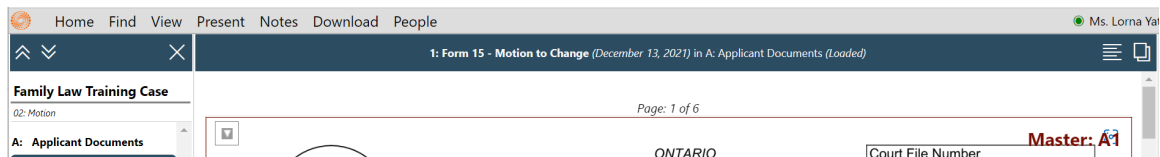
Your cursor should default to the ADDRESS field at the bottom of this LINK window. If it does, just press CTRL + V on your keyboard or Right-Click and select PASTE to paste the link that you copied from CaseLines into the ADDRESS field.



Press OK.

Ta-dum! The reference to the Affidavit should now be blue. You can press CTRL and then Click on the link to test it out. You should be taken into CaseLines to the Affidavit you linked. Consider how helpful this is for the judge.

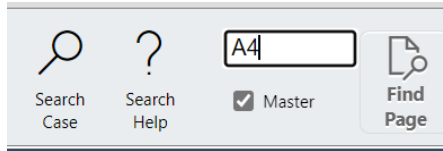
10. CaseLines has a pretty good FIND menu to help you find pages or words in a document or even the entire bundle. From the case menu, select **REVIEW**. A new Tab will open in your browser (**tip:** you don't have to ever worry about getting back to the main case menu – just close the Tab or click on the previous Tab to go back to the case menu). You will have a new menu in the REVIEW screen. Click on FIND from this new menu:



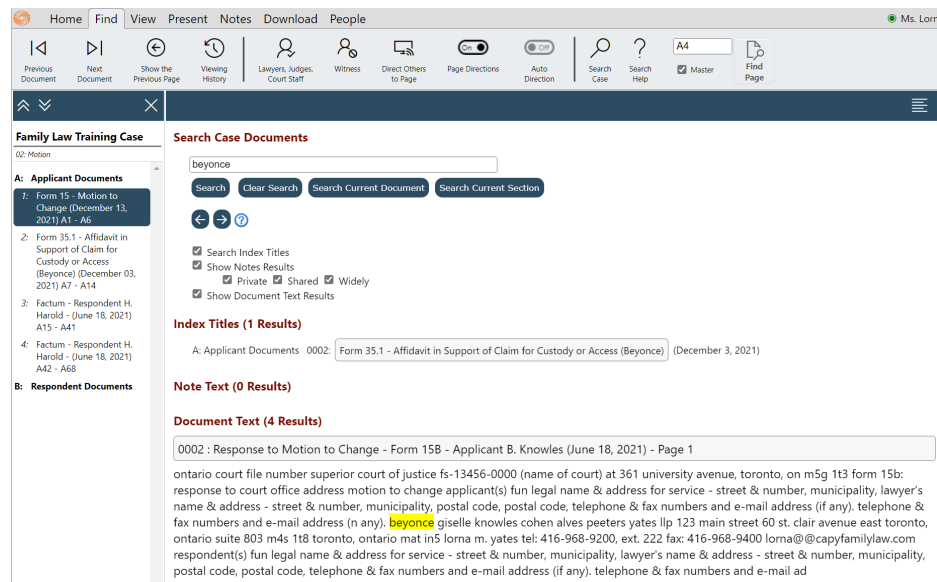
To find a page in a bundle, select **FIND PAGE** on the far right-hand side of this FIND menu:



Ensure there is a checkmark beside MASTER. Now just type in the page you are looking for and press ENTER on your keyboard. CaseLines will take you right to that page.



If you want to look through the case to find a word or reference in a hurry, press **SEARCH CASE** from the FIND menu. From this window, you can type in a word or reference and select SEARCH (**tip:** you can restrict the search to just the document you are in or the bundle, as opposed to searching all documents uploaded in your matter):



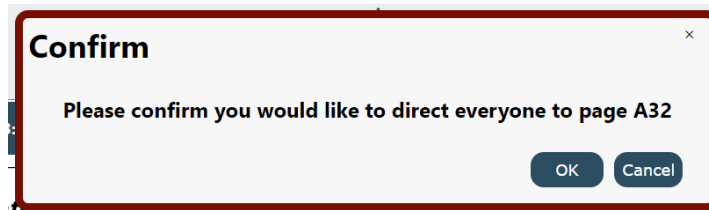
From here, you can see all references to the term you searched with a synopsis below each reference. To go into the document, click on the grey reference (if you hover your mouse over the reference the colour should turn burgundy). Once in the document, the term that was searched will be highlighted:

Applicant(s)

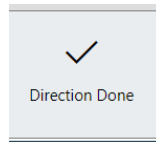
Full legal name & address for service — street
postal code, telephone & fax numbers and e-m.

Beyoncé Giselle Knowles
123 Main Street
Toronto, Ontario
M4S 1T8

11. A great way to take your presiding judge to a specific page when you are making submissions is to use the **DIRECT OTHERS TO PAGE** feature in the FIND menu. Once you are on the page you want to take the judge and your friend/the SRL to, Click to select DIRECT OTHERS TO PAGE. A pop up will appear, asking you to confirm that you want to take everyone to the particular page:



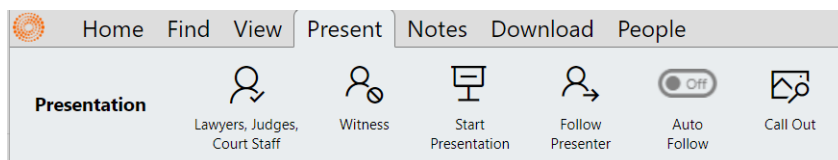
Press OK. Everyone logged into CaseLines on your matter will then be taken to that page. You will know that this worked if you look back up to the FIND menu. The DIRECT OTHERS TO PAGE option will be temporarily re-named to DIRECTION DONE with a checkmark:



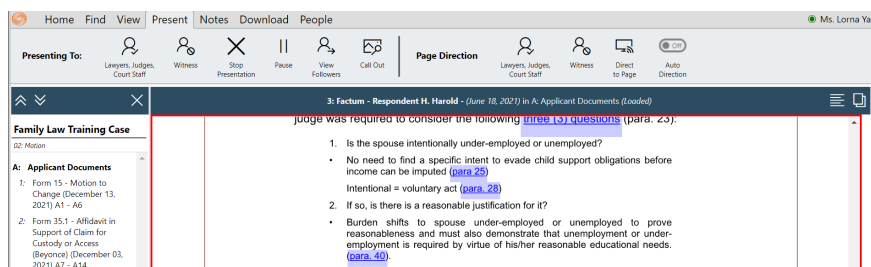
After you have directed others to the selected page you everyone on the case will be free to move around as they please.

12. Notwithstanding my love of Zoom, I now use CaseLines if I want to share my screen during an appearance and the DIRECT OTHERS TO PAGE option is not enough and I want to control the screen and move around between documents, for example.

From the REVIEW menu, select **PRESENT**:



Now select START PRESENTATION. You will see a red border around any documents you move through. You are now controlling everyone's CaseLines experience. You can PAUSE or STOP PRESENTATION any time:



This works the same way as the share screen function on Zoom, so most of you will be familiar with it. Be mindful that it is a bit invasive, however, so use the PRESENT option sparingly and try to use DIRECT OTHERS TO PAGE as to your default.