

# Bundledocs Software

SERVICE DEFINITION

**G-CLOUD 15**

CLOUD SOFTWARE



**bundledocs**

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## About Bundledocs

Since the beginning, Bundledocs has been committed to one thing. Help make lawyers' lives easier in everything we do. It's true! Whether it's through our simple and easy to use product design, flexible price plans, or our friendly support team - we're committed to helping you in any way we can.

In a short time, Bundledocs has gone from strength to strength and is now used in firms worldwide.

Today Bundledocs is sold internationally across the EMEA, APAC and Americas. Our clients range from single user practices to large global law firms to SME's to national government agencies. The entire Bundledocs team is focused on technical excellence, customer care and are dedicated to helping our clients' gain the most benefit from our software.

## Bundledocs Service Definition

The development of cloud-first document bundling, delivery and collaboration software used by governments, legal and professional services to help automate time consuming activities and maximise in-house efficiencies.

## Bundledocs Service Offering

Effortlessly prepare quality professional briefs, reports, eBooks or document bundles in minutes. Simply take a load of documents from your folder, Case or Document Management System. Bundledocs organises them into a neat, numbered, sectioned bundle in minutes – ready to save, share or print. No matter how big or small, you can change in seconds. Simple, easy to use, time saving and massively efficient.

### The Process:

| 5 STEPS TO CREATE A BUNDLE |                                         |
|----------------------------|-----------------------------------------|
| <b>Step 1</b>              | Create your Workspace                   |
| <b>Step 2</b>              | Create your Sections                    |
| <b>Step 3</b>              | Upload your Documents (from any source) |
| <b>Step 4</b>              | Arrange, Order and Customise Bundle     |
| <b>Step 5</b>              | Save, Download or Securely Share        |

### The Result:

Bundledocs produces high quality professional electronic bundles with ease. Each bundle created is immediately available in PDF format. Bundles can be downloaded, saved, printed or securely shared directly within Bundledocs.

Bundledocs responsive design means you are no longer confined to the office. Create complete bundles from scratch, make amendments or simply view your completed bundle - direct from your pc,

laptop, tablet or smartphone. Anytime, anywhere. It is great for any busy professional on the go and ensures you continue to create high quality professional bundles regardless of where you are.

## Customise your Bundle

At Bundledocs we provide a range of customisable options to help ensure that you create a bundle to suit your requirements. Customisation options include:

| Your Bundle                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Bundle Format</b>                  | <p>Bundles are automatically produced in PDF format. Any bundle generated can be downloaded, securely shared, saved, or printed. For double sided printing requirements, there is an option to include vacat pages.</p> <p>In addition to PDF, Bundledocs also includes the ability to export all source documents as a zip file. It can be exported as a:</p> <ul style="list-style-type: none"> <li>• Zip with Converted PDF Documents</li> <li>• Zip with Original Documents</li> </ul> <p>Users also have the ability using Split Points to split very large bundles into two or more generated pdfs.</p>                                                                                                                                                                                                                                                                                                                                                               |
| <b>Custom Cover Page</b>              | <p>Upload a custom cover page for your bundle. Bundledocs automatically produces a simple title page for your bundle, you have the option to upload your own title page for your bundle and/or sections.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Index / Table of Contents Page</b> | <p><u>Automatic Index Page:</u><br/>Bundledocs automatically produces a complete index for your bundle. It is automatically hyperlinked so you can quickly navigate your bundle.</p> <p>Your index page can be customised to meet your requirements. For example, include a document date column, a custom column, choose alternative ordering scheme, hide section or document levels, amend names and headings, set fonts and styles etc.</p> <p><u>Custom Index Page:</u><br/>Upload a Custom Index page(s) to Bundledocs.</p> <p>Our Custom Index allows you control the look of your index page. The Index page is first created within Microsoft Office Word and saved as a word document (.doc, .docx). Each index page is framed using our unique codes which Bundledocs can read and understand. This custom index page is then uploaded into Bundledocs and can be used when generating your bundle.</p> <p>Index pages can be instantly updated at any-time.</p> |
| <b>Table of Authorities</b>           | <p>Upload a custom Table of Authorities.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Font &amp; Styles</b> | Customise the font and styles used for your page numbering, index and section headings of your bundle. You have the option to set your house styles as default or change for each bundle created. The choice is yours.                                                                                                                                                                                                                                                      |
| <b>Digital Numbering</b> | <p><u>Page Numbering:</u><br/>           Pagination is automatic with Bundledocs. You have the option to choose how your numbering appears on the page, even choose to restart numbering at the beginning of each new section, remove it entirely, sort in ascending order etc.</p> <p><u>Bates Numbering:</u><br/>           For anyone that requires it, Bundledocs provides the facility to apply Bates Numbering. This can be customised to suit your requirements.</p> |
| <b>Watermark</b>         | Easily apply a custom watermark. Choose to apply a custom text or image watermark to your bundle. What's great is you can easily add/remove when needed – and all with the click of a button!                                                                                                                                                                                                                                                                               |

## Navigate your Bundle

|                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Hyperlinked Index</b>           | Each index is automatically hyperlinked so you can quickly move to different parts of your bundle.                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Bookmarks</b>                   | Each bundle is automatically bookmarked and can be used to quickly move to different parts of your bundle. Bookmarks are automatically generated and fully customisable. We offer a range of options to customise your bookmarks. For example, include the display order, description, date, page number etc. If changes are made to the bundle, these bookmarks are automatically updated.                                                                                                                                                                              |
| <b>Fully Text Searchable (OCR)</b> | <p>Effortlessly apply OCR to your electronic bundle. Our OCR feature comes as standard so there is no need to purchase any additional software. Applying OCR will ensure your bundle is fully text searchable and you can easily search and find what you want, when you want.</p> <p>Our generated bundles are fully text searchable PDF documents. Finding and navigating through documents can be carried out easily in any PDF viewer. We are working on a document searching feature that will allow document filtering from within the Bundledocs application.</p> |
| <b>Document Reference Links</b>    | Using annotations, you can create Document Reference Links to allow you link to other parts of your bundle. Use the links contained within the document or the links in the bookmarks tab, to quickly move through your bundle.                                                                                                                                                                                                                                                                                                                                          |

|                           |                                                                                                                                                                                                                                                                                      |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Optimisation (DPI)</b> | You have the option to reduce scanned documents or images dpi to allow for smaller bundles and faster navigation with Bundledocs Content Optimisation feature. DPI ratings can be reduced to between 200 and 300 dpi, making significant savings in terms of the size of the bundle. |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## Organise your Bundle

|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Templates</b>                            | <p>Bundledocs templates can help save time when preparing bundles. Using templates will automatically pull in any predefined settings, styles and customisations to help save time when creating bundles.</p> <p>Includes options to lock template settings, set default templates for your own account or for multiple user accounts etc.</p>                                                                                               |
| <b>Sections, Sub-Sections &amp; Volumes</b> | <p>Easily create single section, multi-sectioned or sub-sectioned bundles. This can be done by dragging and dropping. Plus, you can even choose to include/exclude whole sections from your bundle.</p> <p>Bundledocs also provides the functionality to prepare large multi volume bundles. Users have full control and can prepare volumes of any sizes. For example: choose to create new volumes every 100, 120, 150, 300 pages etc.</p> |
| <b>Section Border Colour</b>                | Choose to apply border colours to your section index pages.                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Include/Exclude</b>                      | With each version of your bundle you can choose to include or exclude complete sections or individual documents, with the click of a button.                                                                                                                                                                                                                                                                                                 |
| <b>Order Documents</b>                      | Easily order documents, complete sections and volumes. Bundledocs offers a number of ways to easily order and re-order files. You can select single or multiple files at once and in any order. Order using a simple drag/drop or move selected files with a single click.                                                                                                                                                                   |
| <b>Add Sub-Documents</b>                    | Place documents beneath documents. The sub-document will appear slightly indented and sub-level numbering will be automatically applied. This can be done via upload or drag/drop.                                                                                                                                                                                                                                                           |
| <b>Core Bundle</b>                          | Easily create a core bundle from your Bundledocs bundle.                                                                                                                                                                                                                                                                                                                                                                                     |

## Work with your Documents

|                                  |                                                                                                                                                                                                                                                                                                                                                   |
|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Amend Document Name</b>       | Section and documents can be easily renamed by double-clicking. This can be done at any time directly within Bundledocs.                                                                                                                                                                                                                          |
| <b>Merge Documents</b>           | Any upload files can be merged into a single PDF document with the click of a button.                                                                                                                                                                                                                                                             |
| <b>Include Document Dates</b>    | Easily include document dates within your completed index. You can amend individual document dates, choose date formats and even generate with/without dates with just one click. Bundledocs also supports chronological sorting options.                                                                                                         |
| <b>Include Original Document</b> | Bundledocs automatically scales uploaded documents to A4 size. If required, users can choose to include the original documents either at document level or as a default. This is particularly useful when working with maps or with documents in landscape orientation.                                                                           |
| <b>Insert Blank Document</b>     | This allows users to create a blank document within Bundledocs. This is beneficial for users that want to create their bundle but may not currently have the relevant files. A blank document is inserted within the bundle (where the missing item should be). The blank page is indexed ensuring the bundle is correctly indexed and paginated. |
| <b>Apply Strike Out</b>          | If a document is marked as a 'Strike-out' its contents will be removed from the generated bundle. However, the document name will still be included on your index page and will have a strike-out.                                                                                                                                                |
| <b>Apply Late Inserts</b>        | If you have added any documents at the last minute and do not want to re-generate your index, you have the option to mark as a Late Insert. This will apply alternative numbering and will not affect your current index.                                                                                                                         |
| <b>Replace Document</b>          | Replace any uploaded document.                                                                                                                                                                                                                                                                                                                    |
| <b>Delete Pages or Document</b>  | <p>Specify what pages of your uploaded document you would like included in your bundle. Only the identified pages will then appear in the completed bundle. You can revert to the original document at any time.</p> <p>Remove a document entirely from your bundle.</p>                                                                          |

## Document Editing & Manipulation

|                                  |                                                                                                                                                                                                                                                                |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Quickly Preview Documents</b> | Quickly preview any uploaded document directly within Bundledocs. This is great for those that build their bundle over time or that work collaboratively with colleagues or third parties. Quickly and easily preview any document with the click of a button. |
| <b>Rotate Pages</b>              | Specify what pages you would like to rotate. You can rotate a single page or multiple pages at once. Rotate by 90 degrees, 180 degrees or 270 degrees.                                                                                                         |
| <b>Order Pages</b>               | Easily order and re-order document pages using a simple drag and drop method.                                                                                                                                                                                  |
| <b>De-Skew Pages</b>             | You have the option to choose any document you would like to De-Skew, if any document is slightly off centre.                                                                                                                                                  |
| <b>Crop Document</b>             | Simply specify or choose how you would like to crop your document. Bundledocs will crop your page(s) or document, based on your specifications.                                                                                                                |
| <b>Split Document</b>            | Simply specify or choose how you would like your document split. Bundledocs will create individual PDF files, based on your specifications. This is particularly beneficial for clients that scan large amounts of documents.                                  |

## Redact your Documents

|                                 |                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Redact Confidential Data</b> | <p>Apply redactions to completely remove confidential information from your documents. Again, you can choose to include/exclude with each generated bundle.</p> <p>As your bundle is fully text searchable, you have the ability to redact all or multiple instances of a term/phrase at once.</p> <p>Redaction can be applied overtly and covertly.</p> <p>Bulk redactions can also be applied through search terms.</p> |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## Annotate your Documents

|                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Highlight</b>                     | <p>Add highlights to any uploaded document. Easily amend, remove or even choose to include/exclude with a single button.</p> <p>As your bundle is fully text searchable, you have the ability to highlight all or multiple instances of a term/phrase at once.</p>                                                                                                                                                                                                                        |
| <b>Notes/ Comments</b>               | <p>Ability to add comments to your bundle. You can choose to include:</p> <ol style="list-style-type: none"> <li>1. Public Comments (visible to all) and/or</li> <li>2. Private Comments (only visible to you)</li> </ol> <p>Add, edit or remove comment annotations from your documents. Comment Annotations can be included/excluded with a single click, in each bundle you generate. Additionally, you have the option to generate your bundle with private annotations only.</p>     |
| <b>Labels</b>                        | <p>Add Labels to any document uploaded into Bundledocs. Any label annotation added will automatically form part of your bundle. You have the ability to place the annexure/label at any point in your bundle and any place on the page. In each generated bundle you can choose to include/exclude with a single button.</p>                                                                                                                                                              |
| <b>Document Reference Links</b>      | <p>Add Document Reference Link Annotations to any document. This allows you link to other parts within your bundle. Once created, any reference links created will be automatically added to the bookmarks tab in your completed bundle. In each generated bundle you can choose to include/exclude with a single button.</p> <p>As your bundle is fully text searchable, you have the ability to add Document Reference Links to all or multiple instances of a term/phrase at once.</p> |
| <b>Signature</b>                     | <p>Add an electronic signature to any uploaded document. You can choose to draw your signature; type your signature and customise the font and font size; or upload an image of your signature.</p>                                                                                                                                                                                                                                                                                       |
| <b>Add Image(s) to your Document</b> | <p>Easily apply an image to your document. You have the ability to place the image at any point in your document.</p>                                                                                                                                                                                                                                                                                                                                                                     |

## Collaboration

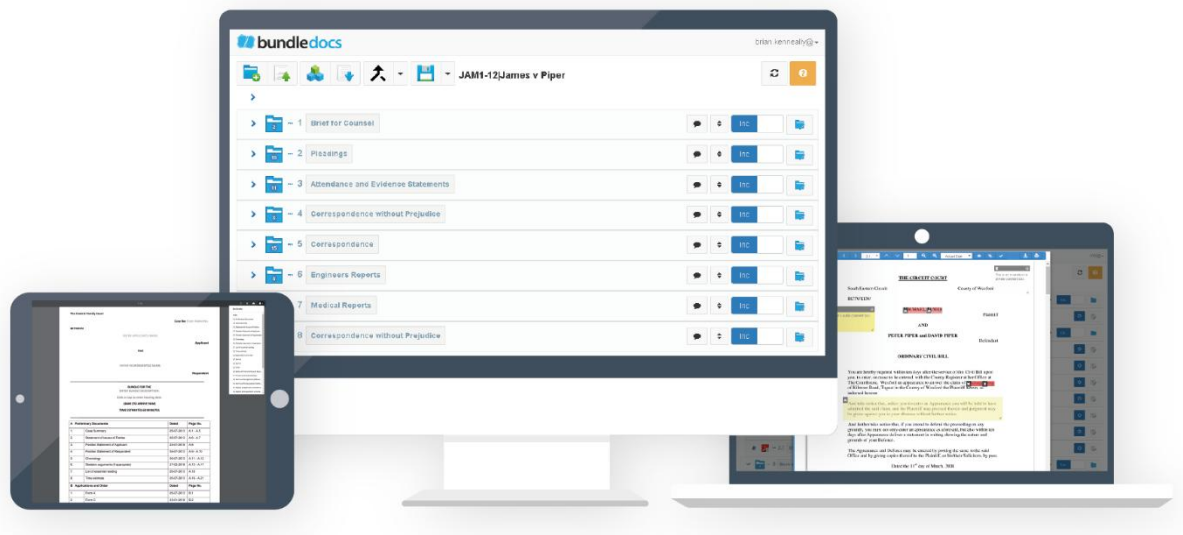
Bundledocs is dedicated to providing our customers with an all-in-one bundling solution that helps with every aspect of bundle creation – from beginning to end. We know that working collaboratively and securely sharing bundles is an important part of the process and can significantly reduce paper waste and delivery costs. Options include:

| Collaborate with Others       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Forward to Third Party</b> | <p>Securely send your bundle to any third party – direct from Bundledocs.</p> <p>Each bundle is password protected, with the ability to set download limits and expiry dates. You can send to more than one recipient at once and include custom comments. It works great when the completed bundles are too large to send via email attachment.</p>                                                                                                                                                                                                                                                                  |
| <b>Collaborate</b>            | <p>Bundledocs Collaboration is ideal when you need to work with anyone outside your organisation. Collaboratively work with anyone, simply grant access and work together on your bundle. Access types include:</p> <ul style="list-style-type: none"><li>• <i>Owner</i>: Can download, upload, update, generate, migrates and delete</li><li>• <i>Contributor</i>: Can download, upload, update and generate.</li><li>• <i>Downloader</i>: Can download only.</li></ul> <p>Everyday examples include: inviting cost draftsman to review cases, inviting outside Counsel to collaborate and review documents etc.</p> |
| <b>Work in Groups</b>         | <p>Share bundles with colleagues so you can collaboratively work together on your bundles.</p> <p>Option to create private bundles that are only visible to you or make bundles available to all/specific groups. Alternatively, make bundles read-only to groups.</p> <p>When working collaboratively with group members on bundles, you have the ability to set section level permissions. Meaning you can specifically choose what sections of a bundle others can work on.</p>                                                                                                                                    |
| <b>Migrate Bundle</b>         | <p>Option to move ownership of a bundle from one user to another.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

Bundledocs is a Cloud-First solution so you can access your bundle at any time and from any location. This allows teams to work collaboratively on bundles – regardless of which office, country or even time zone!

## Mobility

Bundledocs responsive design means you are no longer confined to the office. Desktop, laptop, tablet, smartphone – whatever your device – Bundledocs can be accessed from any location, at any time. This is great for busy professionals on the go. It ensures you and your team can continue to create high quality professional bundles, regardless of which office you are based in or where you are.



Create complete bundles from scratch, make amendments or simply view your completed bundle - direct from your smartphone, tablet, laptop or desktop. Anytime, anywhere.

- For those that utilise Bundledocs on their smartphone or tablet device, Bundledocs responsive design is available on iOS and Android devices.
- Browser Support: Bundledocs supports all modern web browsers including IE9+, Microsoft Edge, Firefox, Chrome, Safari, Opera.

## Documents Supported

Bundledocs has the ability to handle a wide range of document formats.

When a document is uploaded into Bundledocs, it is automatically converted from its native format to PDF. There is no need to purchase additional software, this is all handled automatically on-upload.

In addition to this, when a file is uploaded into Bundledocs we also keep a copy of the original document. This enables our clients to use or securely share the original documents with third parties, if the need arises.

- Word Documents and Adobe (.doc and .docx, .dotx, .dotm, .pdf)
- E-Mail Message (.msg, .eml, .odt)
- Text Files (.txt, .xml)
- Web Pages (.html, .htm)
- Images (.jpg, .jpeg, .png, .gif, .tiff, .tif, .bmp, heic)
- Excel (.xls, .xlsx, .xlsm)
- Rich Text Format Documents (.rtf)

- Multimedia Files:
  - Audio (.mp3, .m4a, .wav, .aac)
  - Video (.avi, .mp4, .webm, .mov, .ogg, .hevc)
- Powerpoint (.ppt, .pptx)

We are continually updating our product so if there are any files that you use regularly in your bundles and would like to know more, get in touch.

## Integration Partners:

At Bundledocs, we are committed to helping our users effortlessly create high quality professional bundles. Having worked with our clients, we know that a seamless integration is integral to making this process even easier. To date, Bundledocs has integrated with a number of leading solutions including: practice management systems, case management systems, document management systems, cloud solutions etc. Some of our integration partners include:

| Integration Partners |                                                                                                                                                                                  |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Actionstep</b>    | Access documents stored in Actionstep and upload into Bundledocs. No setup needed. Simply login directly from your Bundledocs account.                                           |
| <b>Box</b>           | Access documents stored in Box and upload into Bundledocs. No setup needed. Simply login directly from your Bundledocs account.                                                  |
| <b>Clio</b>          | Access documents stored in Clio and upload into Bundledocs. No setup needed. Simply login directly from your Bundledocs account.                                                 |
| <b>Denovo</b>        | Bundledocs integration with Denovo allows you to easily access files stored in Denovo and upload them directly into Bundledocs.<br><br>Contact us to get this integration setup. |
| <b>Dropbox</b>       | Access documents stored in Dropbox and upload into Bundledocs. No setup needed. Simply login directly from your Bundledocs account.                                              |
| <b>GoogleDrive</b>   | Access documents stored in GoogleDrive and upload into Bundledocs. No setup needed. Simply login directly from your Bundledocs account.                                          |
| <b>Iken Cloud</b>    | Access documents stored in Iken Cloud and upload into Bundledocs. No setup needed. Simply login directly from your Bundledocs account.                                           |

|                            |                                                                                                                                                                                                     |
|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>iManage</b>             | <p>Bundledocs integration with iManage allows you to easily access files stored in iManage and upload them directly into Bundledocs.</p> <p>Contact us to get this integration setup.</p>           |
| <b>IIZUKA</b>              | <p>Bundledocs integration with IIZUKA allows you to easily access files stored and upload them directly into Bundledocs.</p> <p>Contact us to get this integration setup.</p>                       |
| <b>Keyhouse</b>            | <p>Bundledocs integration with Keyhouse allows you to easily access files stored in Keyhouse and upload them directly into Bundledocs.</p> <p>Contact us to get this integration setup.</p>         |
| <b>LawWare</b>             | <p>Bundledocs integration with LawWare allows you to easily access files stored in LawWare and upload them directly into Bundledocs.</p> <p>Contact us to get this integration setup.</p>           |
| <b>Quill</b>               | <p>Bundledocs integration with Quill allows you to easily access files stored in Quill Interactive and upload them directly into Bundledocs.</p> <p>Contact us to get this integration setup.</p>   |
| <b>Mattersphere</b>        | <p>Bundledocs integration with Mattersphere allows you to easily access files stored in Mattersphere and upload them directly into Bundledocs.</p> <p>Contact us to get this integration setup.</p> |
| <b>M-Files</b>             | <p>Bundledocs integration with M-Files allows you to easily access files stored in M-Files and upload them directly into Bundledocs.</p> <p>Contact us to get this integration setup.</p>           |
| <b>NetDocuments</b>        | <p>Access documents stored in NetDocuments and upload into Bundledocs. No setup needed. Simply login directly from your Bundledocs account.</p>                                                     |
| <b>OneDrive</b>            | <p>Access documents stored in Microsoft's OneDrive and upload into Bundledocs. No setup needed. Simply login directly from your Bundledocs account.</p>                                             |
| <b>Partner for Windows</b> | <p>Bundledocs integration with Partner for Windows allows you to easily access files stored in P4W and upload them directly into Bundledocs.</p>                                                    |

|                   |                                                                                                                                                                                                 |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | Contact us to get this integration setup.                                                                                                                                                       |
| <b>Relativity</b> | <p>Bundledocs integration with Relativity allows you to easily access files stored in Relativity and upload them directly into Bundledocs.</p> <p>Contact us to get this integration setup.</p> |
| <b>Sharepoint</b> | <p>Bundledocs integration with Sharepoint allows you to easily access files stored in Sharepoint and upload them directly into Bundledocs.</p> <p>Contact us to get this integration setup.</p> |
| <b>Smokeball</b>  | <p>Access documents stored in Sharepoint and upload into Bundledocs. No setup needed. Simply login directly from your Bundledocs account.</p>                                                   |
| <b>Timeslice</b>  | <p>Bundledocs integration with Timeslice allows you to easily access your documents and upload them directly into Bundledocs.</p> <p>Contact us to get this integration setup.</p>              |
| <b>Worldox</b>    | <p>Bundledocs integration with Worldox allows you to easily access your documents and upload them directly into Bundledocs.</p> <p>Contact us to get this integration setup.</p>                |

### Bundledocs Open API

At Bundledocs we provide our API (Application Programming Interface) to any third party looking to integrate with us. Access to our API enables you to integrate all of the features and functionality of our document bundling solution into your own application.

Any potential integration partner must first register their application with Bundledocs to gain access to the API.

Bundledocs follows the OAuth2 spec for authorization and Authorisation Code and Implicit authorisation grant flows are supported.

Interactive documentation for the API is available.

A full Swagger definition file describing the API is available to allow our integration partners generate a wrapper for the API in a wide variety of development languages.

Contact our Support team ([support@bundledocs.com](mailto:support@bundledocs.com)) to discuss the Bundledocs API.

## Bundledocs in the Cloud

From day-one Bundledocs has been a cloud-first SaaS solution. We recognised the incredible benefits that a cloud solution could offer our clients, such as improved usability, scalability and performance.

Innovation and the continual enhancement of Bundledocs is a key priority for us. We develop Bundledocs in short three-week development sprints (development cycles) to ensure our users are always working with the latest, most up-to-date, court compliant solution.

To cater for our global client base, we are continually innovating to ensure Bundledocs remains the market leader in the document bundling space.

Bundledocs is hosted inside Microsoft's Azure Infrastructure. Bundledocs users have full control over where their data is stored and can choose from one of our locations, including the UK (London and Cardiff); in the EU (Dublin, Ireland and Amsterdam, Netherlands); in Canada (Toronto, Ontario and Quebec City, Quebec); in the United States (Virginia and California); or in Australia (Sydney, New South Wales and Melbourne, Victoria).

When dealing with Cloud Architecture, scaling out allows computational resources to be added and subtracted in response to demand. An application's work load is divided across a number of servers, each of which are responsible for the processing of a job or set of jobs retrieved from shared queues of work. With a Cloud based architecture, real computational power comes from parallelism and cost saving comes from resource flexibility.

All of Bundledocs data is stored in state-of-the-art facilities. All traffic in and out of Bundledocs is encrypted in-transit and all document data is encrypted at-rest to prevent security concerns. Bundledocs also has single sign on to user accounts, account lockdown after five failed log on attempts, and other account protection measures to defend against malicious activity. Any potential user of Bundledocs, whether a student or a state, can be fully assured that we are doing everything in our power to keep their documents and data secure.

Bundledocs in the Cloud is always up to date and always improving.

## Technical Requirements

Browser Support: Bundledocs supports all modern web browsers including IE9+, Microsoft Edge, Firefox, Chrome, Safari, Opera.

For those that utilise Bundledocs on their smartphone or tablet device, Bundledocs responsive design is available on iOS and Android devices.

## Backup & Disaster Recovery

At Bundledocs we take our customers data seriously. Bundledocs is hosted on Microsoft's Windows Azure platform which is highly secure and reliable. We implement a number of data backups and utilise both Locally Redundant Storage and Zone Redundant Storage. Our Local Redundant Storage replicates customer data within their region and in order to maximise durability, this is replicated three times. These replicates are then spread across different domains to ensure our customers' data

is available at all times. In addition to this, Bundledocs also utilises Zone Redundant Storage to replicate customer data in another region to provide even higher durability.

Full security details can be found in the Appendix.

## Free Demo & Free Trial Service

### Free Online Demonstration

Bundledocs offers free online demonstrations to both individuals and project groups. Our online demonstrations enable representatives to view the demonstration on their computer screen in real-time. All you will need is a computer with an internet connection and a telephone or headset device. Demonstrations last approximately 30 minutes and our dedicated team will answer any queries or questions during this session. Our free online demonstrations can be scheduled by contacting us on [info@bundledocs.com](mailto:info@bundledocs.com).

### Free Trial Service

At Bundledocs we believe the best way to understand how Bundledocs works is by utilising our free trial service. Our trial is available for 30 days and offers your team the opportunity to test Bundledocs fully. With complete access to our full range of features you can see how easy it is to produce a high-quality electronic document bundle in minutes. During the free trial you will have full access to our support team and our support resources. Register for a free trial account by contacting our team on [info@bundledocs.com](mailto:info@bundledocs.com)

## Service Levels

### Support

Bundledocs is committed to continually improving our support service to best suit the needs of our customers. We provide a number of support methods during normal business hours. Out of normal business hours support can be arranged by request.

Telephone, email and online support are provided as standard.

**1. Telephone Support:**

The Bundledocs Support Department is open daily from 9.00am to 5.30pm GMT Monday to Friday excluding public and bank holidays. During these hours, we have at all times telephone support available to our customers.

Incidents can be logged by telephone on the following numbers:

- a. Calling from the UK: +44 (0)20 3885 0044
- b. Calling from Ireland: +353 (0)21 203 1007

All calls made to Bundledocs are logged on our call logging system. Each call is tagged and given a unique call log number. This enables us to trace any calls and issues that may be resolved, unresolved etc.

**2. Email Support:**

- a. Support Enquiries: [support@bundledocs.com](mailto:support@bundledocs.com)
- b. General Enquiries: [info@bundledocs.com](mailto:info@bundledocs.com)

**3. Online Live Support:** Bundledocs offers real-time live support via our browser-based chat console. Our live online support enables our clients to directly contact our support team and have any questions or queries answered as it happens.

Our online support is available Monday to Friday during working hours 9.00am to 5.30pm, excluding public and bank holidays.

Our support team can be contacted directly via the 'click to chat' tab that appears on our website ([www.bundledocs.com](http://www.bundledocs.com)) and within your Bundledocs account (<https://app.bundledocs.com/session/new/?/#!/>).

### Service Level Availability

We aim for 99.95% availability which is in keeping with Microsoft's own SLA for their Azure Cloud App Services module.

[https://azure.microsoft.com/en-us/support/legal/sla/app-service/v1\\_4/](https://azure.microsoft.com/en-us/support/legal/sla/app-service/v1_4/)

## Target Response Times

The following shows the target response times for us to make a first response to a new call. The Bundledocs Support Department is committed to continually improving our support service and endeavour, wherever possible, to better these response times.

| Priority                   | Response       |
|----------------------------|----------------|
| Application Unavailable    | Within 1 Hour  |
| Practice Affected by Issue | Within 4 Hours |
| Other                      | Within 8 Hours |

## Training & Resources

Bundledocs provides a range of training support to suit every need and requirement. We consider training to be of paramount importance to the successful integration of Bundledocs into your organisation. The Bundledocs training department is dedicated to providing high quality effective training to all our client sites. Sessions can be arranged for initial on-boarding user training, advanced user training (ideal for super users), refresher training, as well as Administrator training.

**On-boarding User Training:** The Bundledocs team are on-hand to guide you through on-boarding and getting started with Bundledocs. Our team can provide online training sessions, resources and any support your team needs to get started. We have outlined the training options below. The initial training session takes about 1 hour, regardless of the users' role. Additional training sessions are available upon request.

**On-going User Training:** Bundledocs offers a range of online resources so our users can improve their awareness and knowledge of new functionality. Key resources include our online training manual, which can be accessed directly from each account. Our clients find video resources particularly helpful so we offer short how-to videos on key features, as well as on-demand long-form videos. In addition to this, we have a range of short guide on key functionality. Our support team are on-hand to provide users with any resources they need and refresher training session can be arranged upon request.

## Training Options

Bundledocs offers a range of training methods to suit your team. Although self-serve training resources are available, we recommend users attend one training session.

Choose a training option that suits your organisation. Options include:

- 1. Live Online Training:** Our training department conduct online training sessions that cater for users of all levels and groups of any size. These online training sessions are conducted at a date and time that are convenient for your team. All you will need for the session is a computer with an internet connection and a headset/telephone. Your team can logon remotely and receive training – regardless of whether they are in the office or in another country. Following the training session our team will provide all relevant support material and answer any questions that may arise.

2. **On-Demand Online Training:** If for any reason a team member is unable to join a live online training session, the training sessions can be recorded, upon request. We also offer on-demand training videos for those that would prefer not to join a live session.
3. **On-Site Training:** Most training is conducted online, however our experienced training team also provide on-site training. On-site training sessions are available to groups of all sizes and abilities.
4. **Train-the-Trainers:** For clients that prefer to utilise an internal trainer this can be facilitated with our 'train-the-trainers' scheme. Our 'train-the-trainers' scheme helps you create 'Super Users' that can conduct internal sessions within your organisation. Our training department will train users on all aspects of Bundledocs and will ensure your team are provided with all the relevant support information and resources required for internal training sessions.

## Ordering & Invoicing Process

Bundledocs users can pay for their subscription either by credit card or standing order.

If you choose to pay by credit card, you will be automatically charged for your Bundledocs subscription. It is automatically set to auto-renew. Users have the ability to cancel their subscription within their account or by contacting the Bundledocs team directly.

If you choose to pay via Standing Order, please submit orders or expressions of interest to:

|                |                                                              |
|----------------|--------------------------------------------------------------|
| Lisa Walsh     | Chief Operating Officer                                      |
| Office Number: | +353 21 203 1007                                             |
| Email:         | <a href="mailto:lisa@bundledocs.com">lisa@bundledocs.com</a> |

## On Boarding/ Off Boarding Process

Bundledocs intuitive design ensures that our clients can begin to build their bundles immediately. Existing documents can be easily uploaded into Bundledocs. We have developed a number of integrations with leading case and document management providers that ensures users have the ability to seamlessly upload documents into their Bundledocs account.

At Bundledocs we recognise that off-boarding is equally as important as on-boarding. Bundledocs enables our customers to remain as “data controllers” with the ability to download individual files and complete bundles. This can be done within the users account and details on this can be viewed within our complete training manual.

If users need any further help or assistance, the Bundledocs Support team can be contacted using the Support methods outlined previously.

## Termination Terms

Following the expiration or termination of a client’s subscription, Bundledocs clients may access and extract data at any time, for up to 90 days.

Bundledocs clients can contact the Bundledocs team directly, following expiration or termination of their subscription and request that their account is deleted and all data extracted.

As customers are responsible for the extraction of their data, there are no additional charges for data extraction. For more information about data extraction, please see the Bundledocs On-boarding/ Off-boarding.

# Bundledocs Software

## **APPENDIX**

### Bundledocs Security



**bundledocs**

## SECURITY

At Bundledocs we take your data security seriously. The following information answers many of the common questions about data security with cloud-computing. If you have further questions, please contact us at [info@bundledocs.com](mailto:info@bundledocs.com).

### HOW DOES BUNDLEDOCS SECURE MY DATA?

#### *In-Transit*

Bundledocs uses TLS encryption technology to ensure a secure channel of communication between our servers and the user's browser. Any communication between our web servers and operational services such as our data storage service or document processing service is secured in this way. This ensures that at no point can Bundledocs data be deciphered during any routing operations.

#### *At-Rest*

Bundledocs uses [AES] in order to encrypt data. Specifically, [Cipher Block Chaining (CBC)] mode with AES.

Bundledocs Encryption Keys are managed and maintained in the [Azure Key Vault service] and access to those Keys is securely provided by [Azure Active Directory] through a [secure token exchange mechanism].

### WHERE IS MY DATA PHYSICALLY STORED?

Bundledocs' data is stored in Europe by default, in Microsoft's Azure Cloud data centres in Dublin, Ireland and Amsterdam, Netherlands. Bundledocs is a true cloud-based solution and as such data may be retrieved from either European location during disaster recovery or redundancy scenarios.

Users may choose to store their documents in United Kingdom, in Microsoft's Azure Cloud data centres in London, England and Cardiff, Wales. Bundledocs is a true cloud-based solution and as such data may be retrieved from either United Kingdom location during disaster recovery or redundancy scenarios.

Users may choose to store their documents in Australia, in Microsoft's Azure Cloud data centres in Sydney, New South Wales and Melbourne, Victoria. Bundledocs is a true cloud-based solution and as such data may be retrieved from either Australian location during disaster recovery or redundancy scenarios.

Users may choose to store their documents in Canada, in Microsoft's Azure Cloud data centres in Toronto, Ontario, and Quebec City, Quebec. Bundledocs is a true cloud-based solution and as such data may be retrieved from either Canadian location during disaster recovery or redundancy scenarios.

Users may choose to store their documents in United States, in Microsoft's Azure Cloud data centres in Virginia and California. Bundledocs is a true cloud-based solution and as such data may be retrieved from either United States location during disaster recovery or redundancy scenarios.

### WHAT CERTIFICATIONS DO THESE DATA CENTERS HAVE?

Microsoft's Azure Cloud operates in the Microsoft Global Foundation Services (GFS) infrastructure, portions of which are ISO27001-certified, ensuring an industry standard degree of data centre security.

ISO27001 is recognized worldwide as one of the premiere international information security management standards.

Responsibility for compliance with laws, regulations, and industry requirements remains with customers, but Microsoft is committed to helping them achieve compliance.

For more information visit:

- EU-U.S. DPF, UK Extension to the EU-U.S. DPF, and Swiss-U.S. DPF  
<https://www.dataprivacyframework.gov/s/>
- Azure compliance offerings  
<https://learn.microsoft.com/en-us/compliance/regulatory/offering-home>
- Azure ISO/IEC 27001 Information Security Management Standards  
<https://learn.microsoft.com/en-us/compliance/regulatory/offering-iso-27001>
- Azure ISO/IEC 27001 Certificate  
<https://learn.microsoft.com/en-us/azure/compliance/offerings/offering-iso-27001>
- BSI Australia ISO/IEC 27001  
<https://www.bsigroup.com/en-AU/ISO-27001/>

### HOW IS ACCESS TO MY DATA MANAGED?

#### *System Level*

Best practices for data security are followed to ensure that only authorized access to Bundledocs data is provided.

Bundledocs application and database servers are hosted in Microsoft data centers. Connections to the database are always encrypted, and unencrypted connections are disabled.

Note: Windows Azure Achieves ISO 27001 Certification from the British Standards Institute.

### Application Level

We have procedural measures in place, such as access restrictions on service operations to prevent any possibility of unauthorized access to your data and documents. Bundledocs is the only service that can retrieve your documents in an unencrypted way. In the unlikely event of any data being maliciously retrieved from Microsoft's data storage services, the data would never be readable due to the data encryption measures we have in place.

### User Level

User level access is negotiated using the OAuth specification.

## AUTHENTICATION, SESSION MANAGEMENT, & ACCESS CONTROL

User credentials are encrypted and uniquely salted to protect them in case of unauthorized access. Every piece of the Bundledocs infrastructure provides encryption in-transit. All communications from the browser to the application as well as the application to the database, membership server and file storage are encrypted using TLS.

Bundledocs authenticates and authorizes every request to the application. This ensures that users are only capable of viewing data and performing actions they are permitted at the time of the request.

- Users are logged out of the application after a period of inactivity. This ensures that unwanted access is not possible if a user leaves their account unattended.
- Passwords are recovered by sending a reset password request to the users email address. This ensures that only the user with access to the users email account can change a password.

## FOR HOW LONG IS MY DATA STORED?

In terms of retention periods of your completed bundles. The standard is up to six versions of any completed bundle are retained. So, if you created a seventh version of a particular bundle, the first will be deleted automatically. You can also delete any version manually if you choose to do so.

A bundle will stay on the server until it's deleted by the user or for 3 months after a users' account has expired.

We do maintain backups for 7 days so it is possible that the data may be contained within the backups for up to 7 days.

## HOW IS DISASTER RECOVERY HANDLED?

Bundledocs uses Azure Storage replication for disaster recovery and protection. Visit Microsoft Azure (<https://azure.microsoft.com/en-us/documentation/articles/storage-redundancy/>) for more information.

## XSS & INPUT VALIDATION

ASP.Net Request Validation - prevents the server from accepting content containing un-encoded HTML. This feature is designed to help prevent some script-injection attacks whereby client script code or HTML can be unknowingly submitted to a server, stored, and then presented to other users. While input validation should always be performed both on the client and server, request validation provides a powerful filter on all incoming requests before they even reach the application.

ASP.Net MVC3 .Aspx View Engine - We encode all HTML output by default to protect against malicious user input that wasn't properly validated. Validating user input is a key principle of building secure applications but this additional layer of security provided by the framework gives additional protection.

#### HOW DO I REPORT A SECURITY INCIDENT?

Please contact us if you have experienced an incident with your account. Once we receive your report, we'll send you an email telling you the best way to track the status of your report. We'll begin to investigate the incident right away, and work with you to make sure we fully understand the problem. However, we won't disclose any issues until we finish the investigation. Once the investigation is complete and the issue resolved, we'll post a security update on our site giving you thanks and credit for the discovery.

#### HOW CAN I LEARN MORE ABOUT CLOUD SECURITY?

If you have other questions regarding how we keep your information secure, simply email us [info@bundledocs.com](mailto:info@bundledocs.com).

# Contact the Bundledocs Team Today!

Any Questions? We endeavor to help you with any queries or questions you may have. Get in touch with the Bundledocs team today. We're here to help!

## CONTACT

Email: [info@bundledocs.com](mailto:info@bundledocs.com)

Web: [www.bundledocs.com](http://www.bundledocs.com)

### Postal Address:

Westpoint Business Campus,  
Link Road,  
Ballincollig,  
Co. Cork,  
Ireland