

Electronic Briefs

My strong preference is to be briefed electronically, whether via email through a file share platform or a shared vault in Harvey.

That said, over time electronic briefs are just as liable to become a mess as a hard copy brief. This note is intended to help all keep the brief in order so that I can find and use the materials as efficiently as possible.

Index

1. Please always include an index which can grow when the brief expands – something like this:

A.	Pleadings	Date
A 1	Summons	
A 2	Commercial List Statement	
A 3	Commercial List Response	
B.	Key documents	
B 1	Policy Schedule	2019-2020
C	Interlocutory Applications	
C 1	Motion for preliminary discovery	

2. **Whenever I am briefed with substantive documents, eg pleadings, evidence, interlocutory applications, discovered documents, journal articles etc, please include an updated index.** This has several benefits. *First*, to facilitate working paper free, I currently use Dropbox, Liquidtext and Harvey. My wonderful PA (Joanne Andrews) manages all of the administration associated with my practice. Without an updated index, she does not know where (in the brief) new documents should be saved, including whether, for example, to set up sub-folders. *Second*, without an updated index, it takes me much longer to find the documents. *Third*, if we all have the one index, it facilitates communication between us all and saves time.

Document formats / file names

3. All documents which are being included in the substantive brief (other than the index and documents for me to settle) should be PDFs, preferably text searchable. Where possible, please save excel spreadsheets both in native form and PDF so I have a copy I can manipulate and one I can use in Liquidtext.

4. As I Mac user, I often cannot read native emails sent as attachments and, importantly I cannot save them into Liquidtext. Please convert native emails into PDFs and generally save as 1 PDF the email with its attachment(s).
5. At the start of a case please don't brief me with one large PDF with pleadings, evidence etc (even with hyperlinks between documents). They are too difficult to manipulate and it makes it too difficult to manage when the brief expands.
6. Ordinarily I find it easiest if each document (or set of documents) is a separate PDF – so I can have more than one open at a time. That said, for most cases I have found that the following works particularly well:
 - **Pleadings**: Separate PDF for each document, preferably with a short file name such as "ASOC".
 - **Courtbooks**: 1 (large) PDF with a file name such as "CB" or separate courtbooks to match the Court's folders.
 - **Appeal books**: 1 PDF per book with a file name such as "*Black 1*".
 - **Affidavits**: 1 PDF for the affidavit titled "*Jones 1*" and a 1 PDF containing all exhibits titled "*Jones 1 Ex*".
 - **Historical client file**: 1 **PAGINATED** PDF per volume of 'file'.
 - **Subpoenaed documents**: 1 **PAGINATED** PDF per packet, using the packet no. as the file name, with the schedule on top.
 - **A curated set of documents**: Separate PDF for each document with the PDF file name matching the brief index (eg just "A 21").
 - **Authorities/academic articles**: Generally 1 PDF per document or 1 PDF per volume to match the Court's folders.
7. Please try to ensure that the file name mirrors the brief index. That makes it easiest to file/retrieve and replace.

Sending Briefs and updates

8. I don't ordinarily download or save documents. My secretary Joanne Andrews is in charge of all the administrative work associated with my practice. If you are setting up access to an electronic brief, please include Joanne to ensure a smooth process.
9. If you have any queries about the form of an electronic brief, please talk to Joanne at 8239-0207 or at [**joanne.andrews@banco.net.au**](mailto:joanne.andrews@banco.net.au)