How can I create a Disclosure Bundle with Disclosed Documents Only?

Disclosure · https://disclosureready.us.legalready.ai/knowledge/how-can-i-create-a-disclosure-bundle-with-disclosed-documents-only/

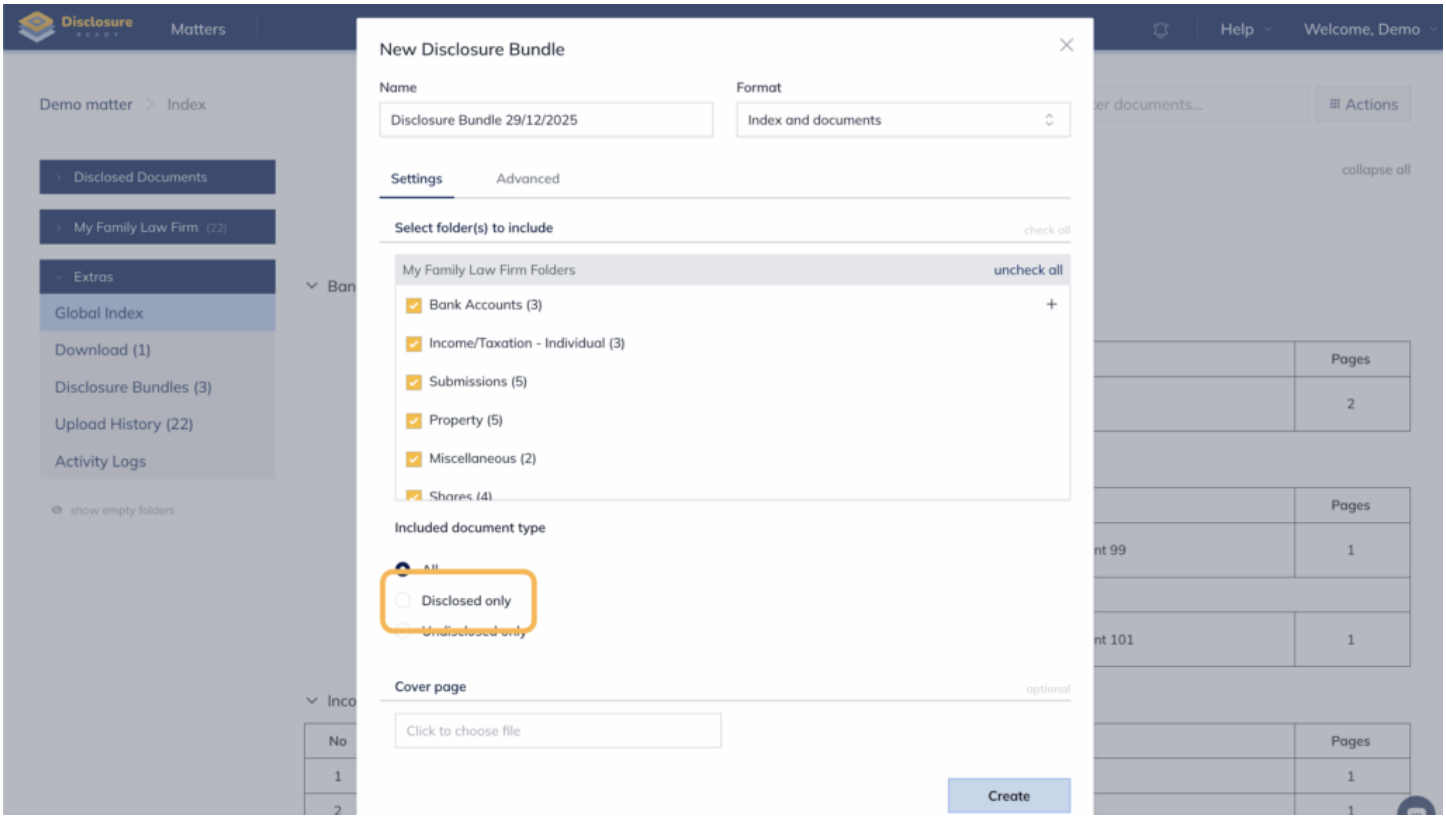
This article shows you how to create a Disclosure Bundle with only disclosed documents in Disclosure Ready.

To create a Disclosure Bundle, open your matter, select the Actions button, and choose Create Disclosure Bundle from the dropdown list.

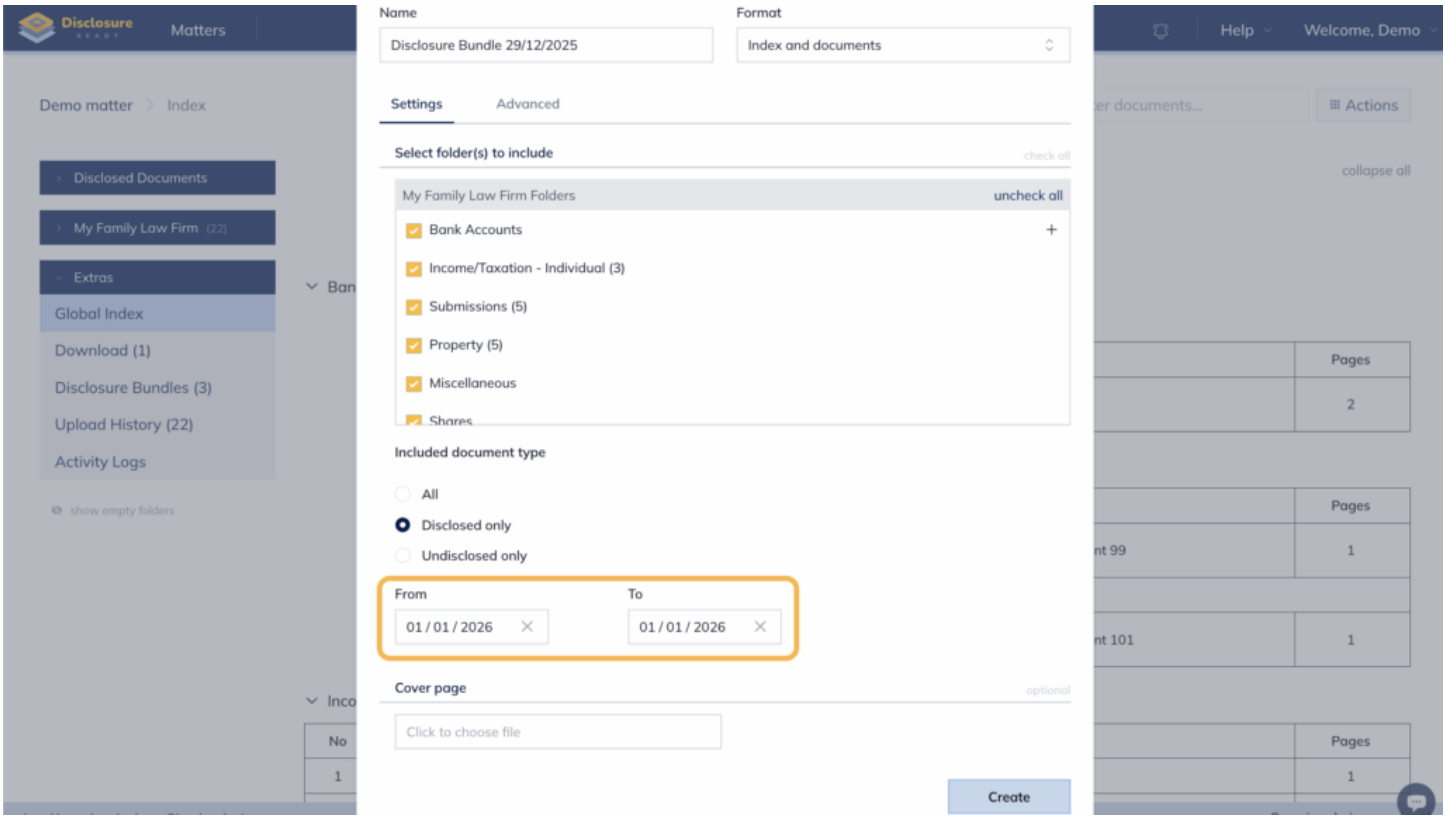


In the "Settings" tab, you can define the basic structure of the Disclosure Bundle. This includes naming the bundle, selecting which sections to include in the format, choosing the folders to include, and deciding whether to insert a cover page.

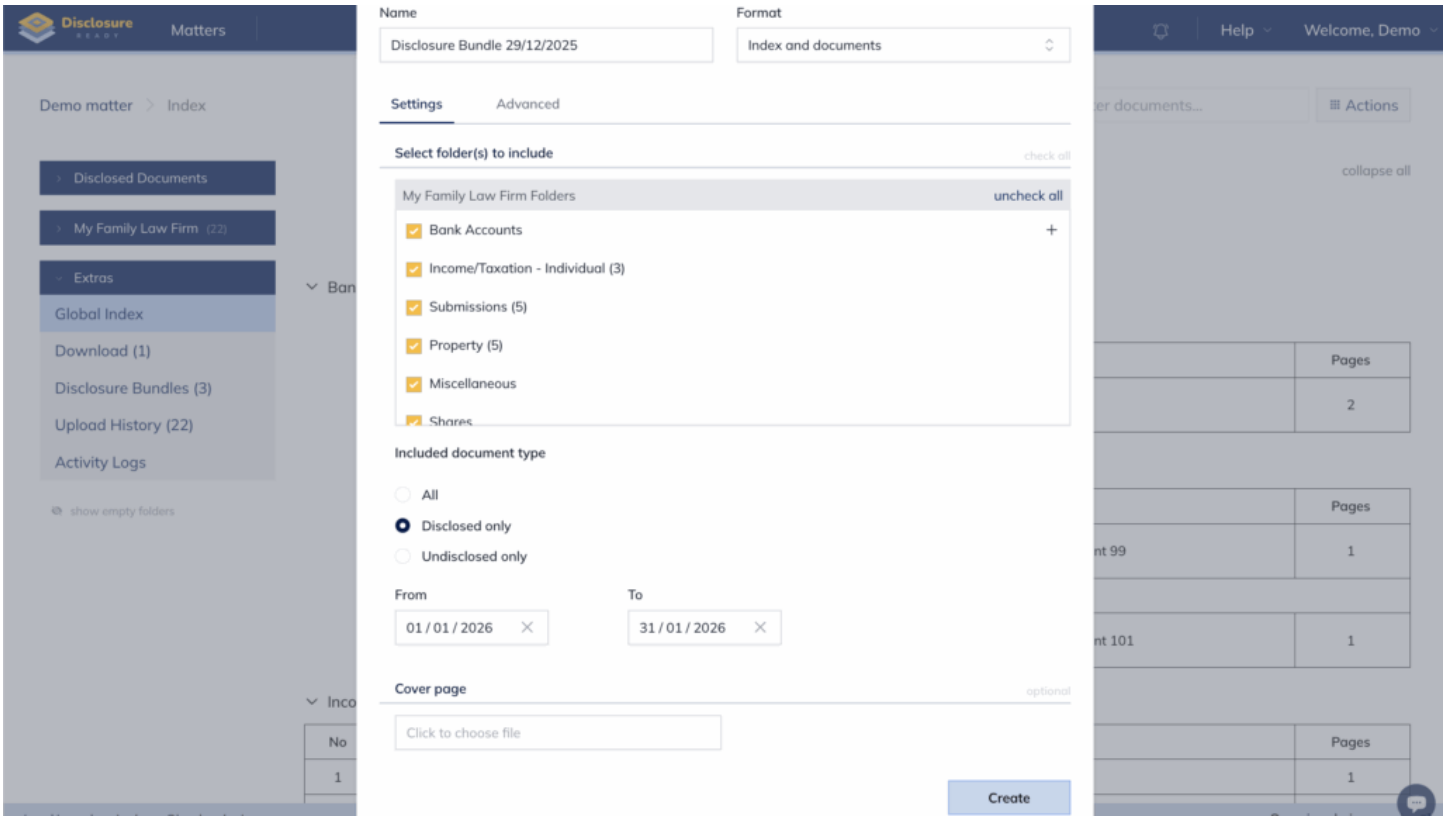
Under the "Included document type", you can select to include all disclosed documents by selecting "Disclosed only". This automatically selects all documents that have been marked as disclosed.



You can further narrow the selection by specifying a single disclosure date:



Or even a date range:



Once you have reviewed your settings and document selection, proceed to generate the Disclosure Bundle. The resulting bundle includes only the disclosed documents that match your selected criteria.