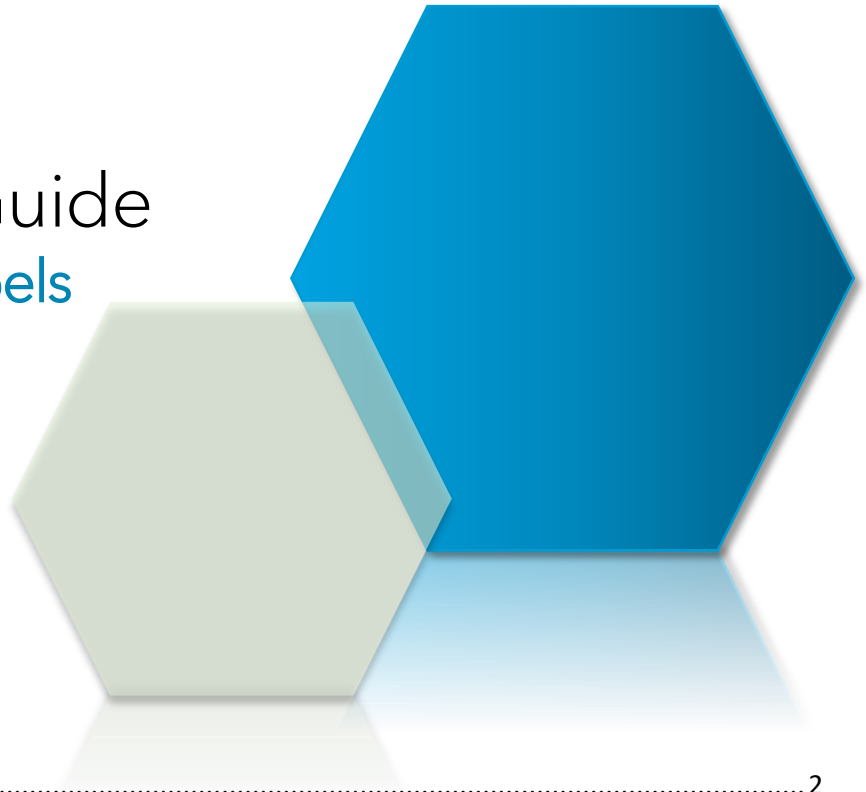


Primafact 6

Quick Start Guide

Customizing Labels



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Introduction

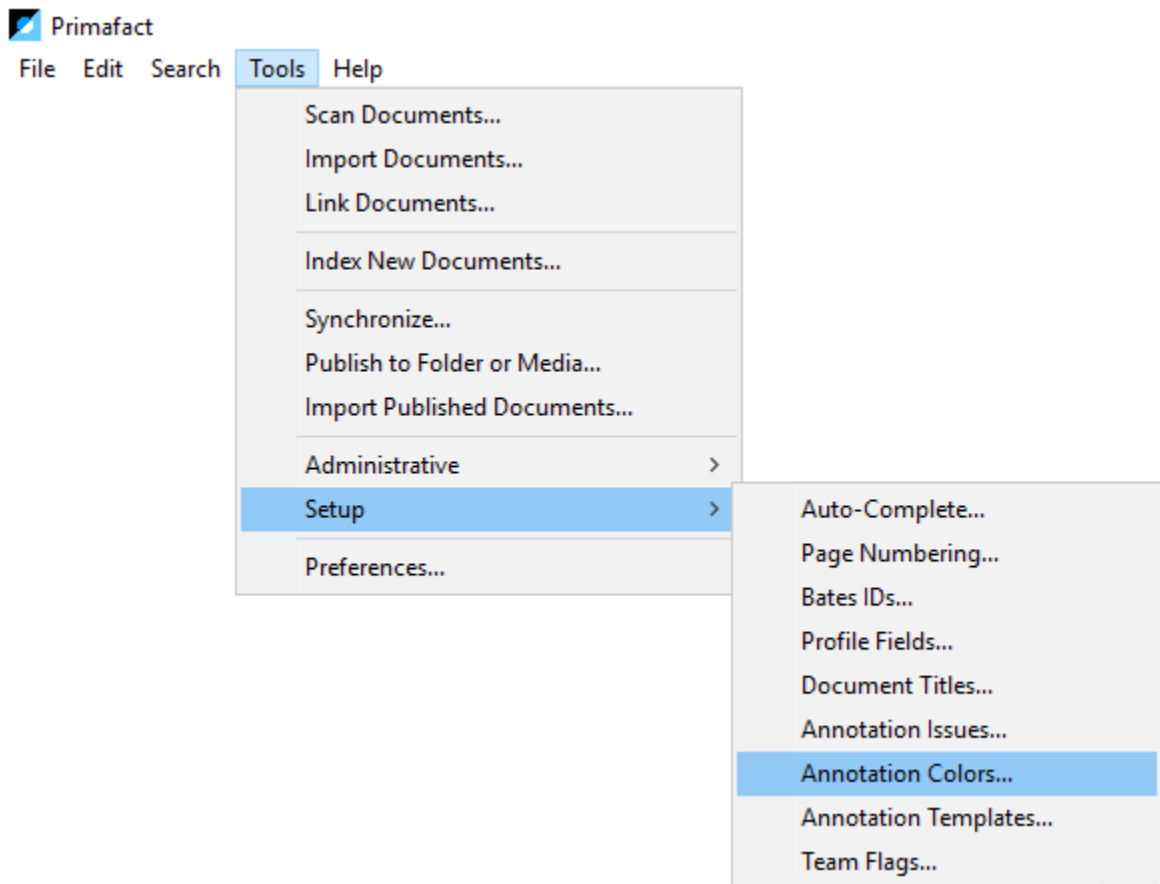
Primafact 6 introduces customizable labels for Annotation Colors and the new Team Flags. These make it easy to code more precisely and consistently, so you can quickly & flexibly filter binders and lists to focused content.

Customizing Annotation Color Labels

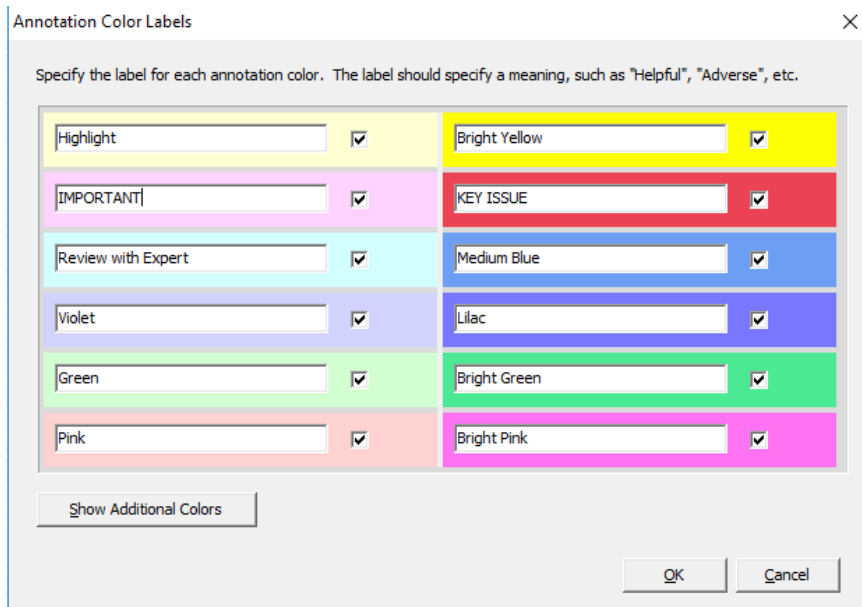
Customizing Annotation Color Labels makes it easier to standardize annotation color coding.

Customizing System Default Labels

1. In the main Primafact Toolbar, select **Tools > Setup > Annotation Colors**.



2. The **Annotation Color Labels** window will open.



You will see 12 colours. Click **Show Additional Colors** to make 9 additional colours available.

Select the colors you wish to use by clicking the checkbox to the right of the selected color. Enter the color label in the text area of the selected color.

Click **OK**.

Now you have set your Annotation Color system defaults.

Customizing Case Default Labels

If you want to customize your Annotation Color Labels for a specific Case:

1. Open any Case Binder.
2. Click the gear icon at the bottom-right the Primafact Window:



3. Select **Annotations > Annotation Colors**.

- The **Case Annotation Labels** screen will open.

Annotation Colors - SMITH, James - (21-0001)

Use Defaults
 Override for this case

Highlight	<input checked="" type="checkbox"/>	Pre-Accident Health	<input checked="" type="checkbox"/>
Income - pre accident	<input checked="" type="checkbox"/>	Income - post accident	<input checked="" type="checkbox"/>
Review with Expert	<input checked="" type="checkbox"/>	Blue (Medium)	<input checked="" type="checkbox"/>
Medical - pre accident	<input checked="" type="checkbox"/>	Medical - post accident	<input checked="" type="checkbox"/>
ADHD	<input checked="" type="checkbox"/>	Bright Green	<input type="checkbox"/>
Witness Qs	<input checked="" type="checkbox"/>	DOL	<input type="checkbox"/>

Show Additional Colors

OK Cancel

- Select **Override for this case**.
- Add** or **rename** any color that you wish to customize for the Case. (Colors that you do not rename will retain the default system labels.)
- Click **OK** to preserve your updates.

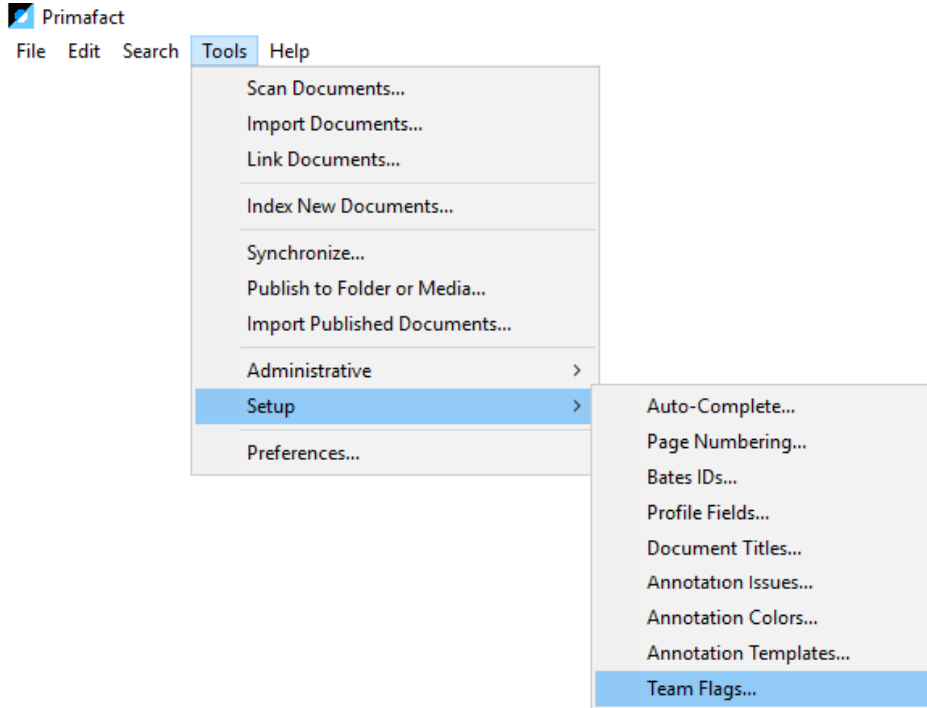
*Note you can copy values from another Case by using the **Setup Case From Template** gear menu option.*

Customizing Team Flags

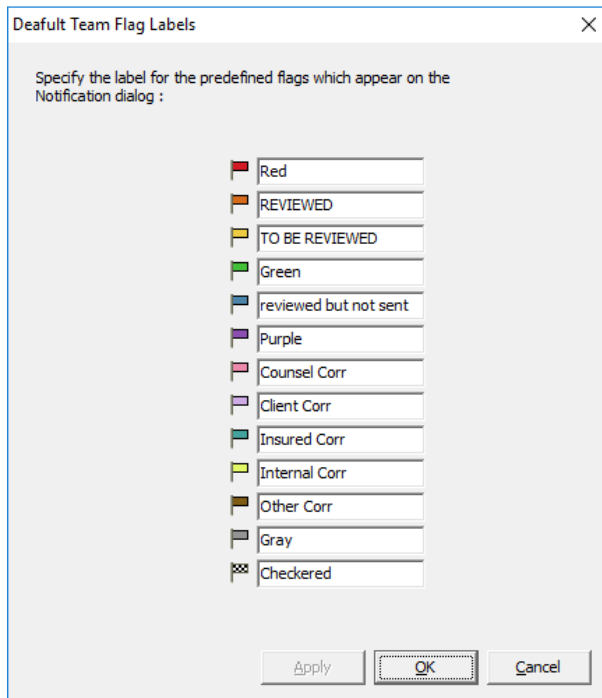
Team flags are colored document-level flags. Adding labels helps ensure their use is standardized across the team.

Customizing System Default Labels

1. In the main Primafact Toolbar, select **Tools > Setup > Team Flags**.



2. The **Default Team Flag Labels** window will open.



3. Enter the desired label in the field to the right of your flag.
4. Click **OK** to save.

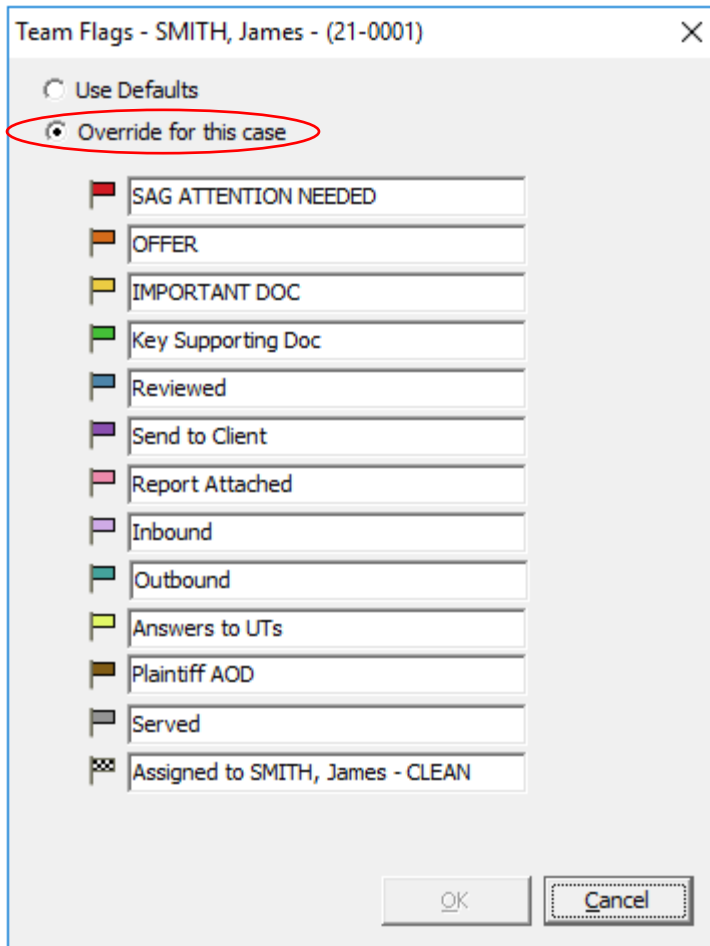
Customizing Case Default Labels

If you want to customize your Team Flag Labels for a specific Case:

1. Open any Case Binder.
2. Click the gear icon at the bottom-right the Primafact Window:



3. Select **Team Flags**.
4. The **Case Team Flags** window will open.



5. Select the **Override default** button.
6. Enter the desired label in the field to the right of your flag. This will set a new label value for your Case.
7. Select **OK** to preserve your updates.