Primafact 6
Case Template & Customization Guide

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About this Guide

This Guide is designed to help Primafact Administrators and team leaders independently configure Default setting customizations, customized Case Templates and associated Primafact enhancements. It is part of a larger series of Primafact 6 Planning Guides.

How to Use This Guide

This guide offers feature descriptions and some step-by-step instructions for customizing many newly customizable system defaults and Case Template settings in Primafact. Users wishing to customize Case Templates in Primafact will need to have associated Case Permissions enabled to make any Customizations. See ***Setting Case Permissions*** below for details on enabling this feature.

Be sure to review *How Color Label Settings Behave Across Cases* before determining your team's Case Template standards.

Before customizing any Primafact settings, we recommend reviewing our Planning Guide, which outlines available new features, and offers some guidance on implementation considerations.

Also review the ***How Color Label Settings Behave Across Cases*** section of this Guide, which describes some key differences between system Default settings and Case Template settings so you can understand their respective impact on users when you implement future updates.

New Customizations Available in Primafact 6

Primafact 6 's new Case Permissions tool, which restricts user access to certain Case-level settings, can be set to restrict default permissions at the system level and the Case Template level. Permitted users can also apply permission customizations at the Case level.

Annotation Color Labels & Team Flag Color Labels can be set at the system level and at the Case Level (including as Case Templates)

Primafact 6 also includes more customizable coding options for annotations, as well as new customizable Team Flags. Customizable Saved List views make it easy to create multiple viewing options for more efficient assembly of reports, and presentation of information suited to different tasks.

List Views, Annotation and Team Flag Colors and labels can be customized as system defaults and by Case. Setting up Case Template views, colors and labels makes it easy to standardize settings across applicable Cases.

Case Permissions:

- Controls which users are entitled to
  - Be Case Administrators
  - Adjust Case Settings
  - Apply Batch Coding
- Basic Permissions can be set as System Defaults & on Case Templates
- Permitted users can adjust Case settings

Annotation Customizations:

- 18 colors are available; each can be set with customizable labels
- Default Annotation Settings can be adjusted system-wide and for individual users
- Annotation Templates can be created
- Annotation Views can be created globally, by Case, and for individual users

Team Flag Customizations:

- 13 colors are available; each can be set with Customizable labels

List View Customizations:

- Available for Annotation Lists, Document Lists, and Inbox Lists

How Color Label Settings Behave Across Cases

Case Template Labels vs. System Defaults

When determining color label settings for Annotations and Team Flags in Primafact, consider how any future changes to your settings will apply to your Case content. **Updating Case Template color labels will impact your Case labels differently than updating color labels at the system level.**

Depending on your goals, you may prefer to use system-level settings, Case Templates, or a mix of both on Cases.

! Updates to Case Template color labels will impact your Case color labels differently than updates to System-level color labels

Updates to System-Level Labels

When you apply color label settings at the system level (**Tools >Setup**), these labels become **Primafact system-wide Defaults**. Updates to system-wide default color labels will update any corresponding Annotation and Team Flag Case color labels to match the updated default labels *unless the Case's color labels are set to* ***Override for this case***.[1]

Updates to Case Template Labels

If you are using a Case Template to set color label values for Annotations or Team Flags ***and the Case Template is overriding system defaults***, your Case's ***color labels will not change*** when the Case Template is updated.[2]

[1] If you are using System-level color coding and do *not* want to update color labels on existing Cases, you'll need to set up a Case Template for existing Cases "**Existing Case Template**" , and set those colors to your existing colors, then update each applicable Case to Copy the Existing Case Template for Annotation Colors. If you are also updating Team Flag colors to match prior system values, Team Flags would need to be updated as well – Annotation Colors and Team Flags are updated independently of one another.

[2] This is because Primafact assumes that when you set color labels by *Case*, your team has a specific reason for recording a Case-specific value, and updating to match new defaults would interfere with those Case-set values.

To update a Case's color labels to match the updated Case Template, use the **Setup Case From Template** tool in the **Case Geary** menu to apply the update.

Note *Annotation Color labels and Team Flag labels are set independently from one another. It's possible that your team uses Annotation Color labels from the Case Template, and system-level settings for Team Flags (or vice-versa).*

Chart – Labels: Case Template vs. System Defaults

Color Label Update Performed	What Happens to Corresponding Color Labels on your Case?	
	You are using System-wide Default Labels on the Case	You have Copied Case Template Color Labels on the Case (where Case Template Color Labels override defaults)*
Update to **System-Wide** Annotation Color Labels	Case Annotation Color Labels auto-update to match new system labels	Case Annotation Color Labels ***do not*** update automatically to match system default
Update to **Case Template** Annotation Color Labels	N/A	No update to Case Annotation Labels until you update the Case using *Setup Case from Template* tool (This will cause all Team Flag labels for the Case to change to match updated template)
Update to **System-Wide** Team Flag Labels	Case Team Flag Color Labels auto-update to match new system labels	Case Team Flag Labels ***do not*** update automatically to match system default
Update to **Case Template** Team Flag Labels	N/A	No update to Case Annotation Labels until you update the Case using *Setup Case from Template* tool (This will cause all Team Flag labels for the Case to change to match updated template)

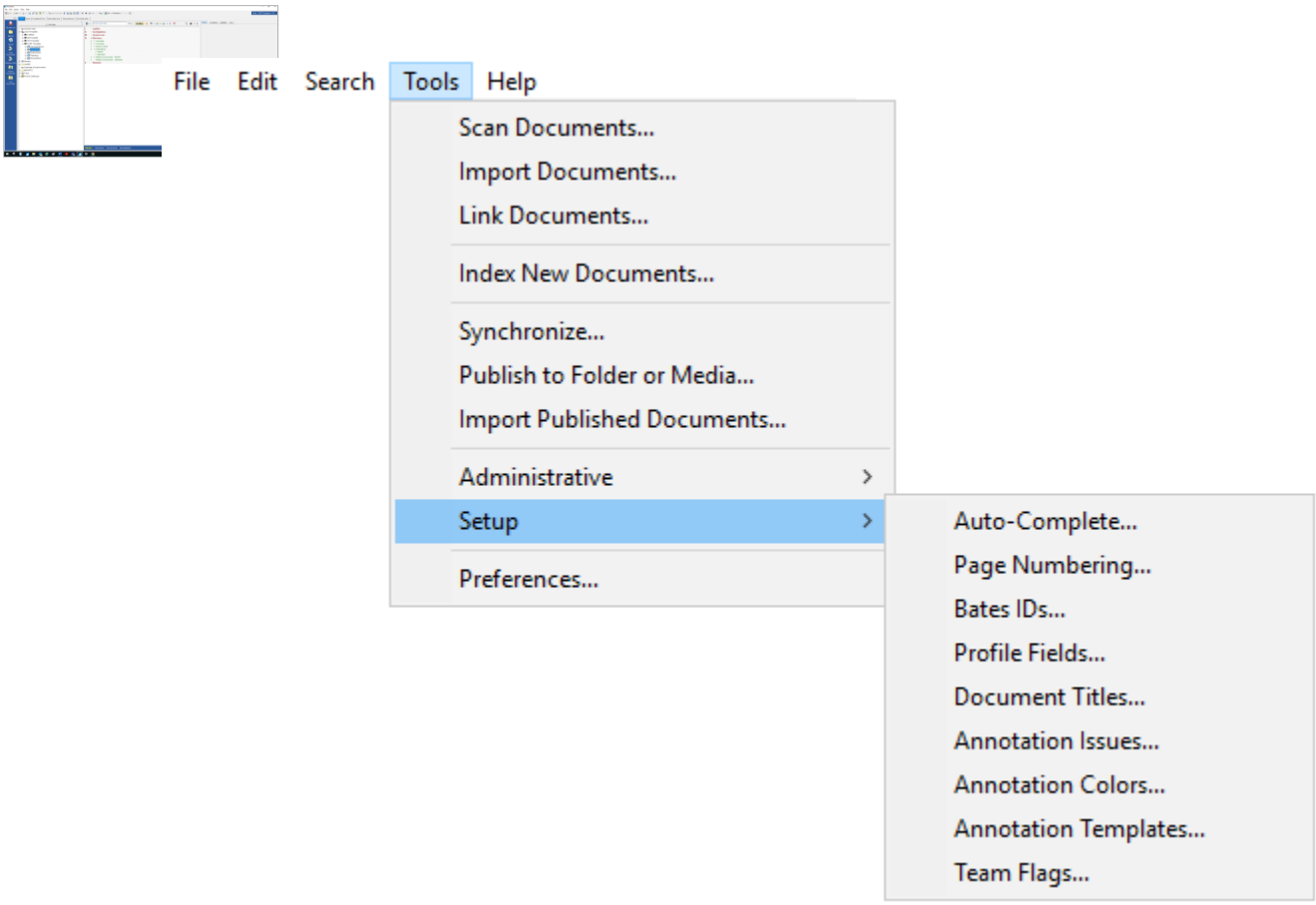
****Note: If your Case Template uses system-wide default label values for Annotation Colors or Team Flags, your Case labels will auto-update to match the current corresponding system-wide values.***

Changing Primafact System-Wide Defaults

For Annotation Issues, Annotation Colors, Annotation Templates and Team Flags

Primafact now allows you to customize your system defaults for new features, including Annotation Color labels, Annotation Templates, Document Titles (Title Aliases) and Team Flags.

You can find these settings on the Primafact main Toolbar, under Primafact **Tools** > **Setup**.



For Case Permissions

Case Permissions govern which users are allowed to set Case Permissions, adjust Case Settings, and perform annotation Batch Updates. Case Permission settings can be configured on the **LS.ini** file located at the Primafact server. The default Case Permissions are set as:

AllowCaseAdministrationByDefault=**No**

AllowCaseSetupByDefault=**Yes**

AllowBatchUpdatingDefault=**No**

To enable different default system settings, you will need to adjust the LS.ini file, with assistance from your firm's IT manager.

***Note* you can set different Case Permissions on Case Templates, which override system settings when applied to new Cases.**

A Note about List Views

Saved Annotation List Views and Document List Views are created in Cases, and Global Public[3] List Views can be attached to individual Cases and Case Templates. Default home list views can be set on the Case Template, and can also be adjusted at the user level.

Saved global Public Inbox List views are created in the Inbox and are visible to all users.

Primafact 6 Case Templates

What is a Case Template in Primafact 6?

Case Templates in Primafact 6 build upon Case Templates in earlier versions of Primafact. As in prior versions of Primafact, Case Templates in Primafact 6 are set up as black Case folders containing one or more named Tabbed Binders along with optional folders. Your template may even contain template documents or links to file locations on your network.

Case Templates let you automatically apply template settings to new Cases, or to update existing Cases.

Case templates can be used to create new Cases, or to update existing Primafact Cases to match selected Case template settings.

Case Binder Structure

As in prior versions of Primafact, using a Case Template as the basis for a new Case will automatically create a new Case that includes the same binders, tabs, sections and folders in the same order that they appear in your Template.

Updating an exiting Case with a Case Template will ***not*** impact the current Binder or folder structure of the existing Case.

What's New in Primafact 6 Case Templates?

Along with pre-configured binders, tabs and sections, and optional folders, Primafact 6 allows you to add Case-specific settings, including:

- Annotation Colors and Labels
- Annotation Issues
- Annotation Event Time (along with Event Date)
- Team Flag Colors and Labels
- Saved List Views
- Autocompletes

These settings can be automatically added to New Cases (they are incorporated by default, but you can selectively apply system Default settings if you choose.

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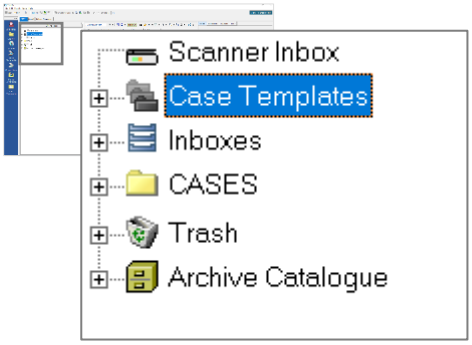
[3] **Global** List Views are available to all Cases. **Public** List Views are visible to all users (where available to the Case). Case List Views can be also created for individual Cases, and visibility can be restricted to the user creating the View.

Documents in a Template are also included in Cases created using the Template, but you have the option to exclude them when your Case is created.

Where Can I Find Case Templates?

Notice there is a new built-in folder near the top of the Primafact Explorer Pane, called **Case Templates.** This folder is hard-coded into Primafact, and cannot be moved or renamed.

Primafact considers any Case located in the Case Template folder to be a Case Template. Any Case outside this folder is not considered a Case Template (even if used as such by your Team). You can use regular Cases as templates in certain situations, but Primafact treats regular Cases differently from templates located in the Case Template folder.



Creating and Updating Case Templates

Updating Existing Case Templates

If you already have existing Case Templates, you can move them from their current location to the Case Templates folder. Applying settings as listed in the *What's New* section above enables Case coding and views to be standardized to match the settings of your Template.

Creating New Templates in Primafact 6

To create a new Case Template, simply Add a new **Case Folder** to the **Case Templates** folder. Add binders, tabs and sections. Customize your Case Settings as desired using the instructions below. You may need to close and reopen Primafact to use your new Template.

Adding Customized Settings and Views to Your Case Templates

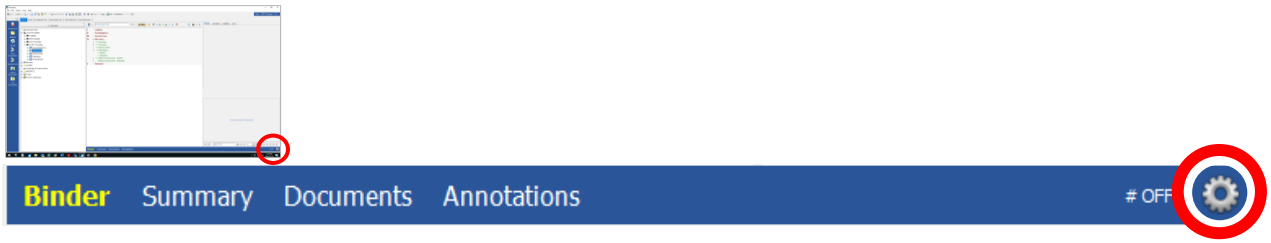
Why Customize a Case Template?

Adding Customizations to Case Templates allows you to establish settings suited to the requirements of a particular Case Type, which may differ from preferred setting for other types of Cases.

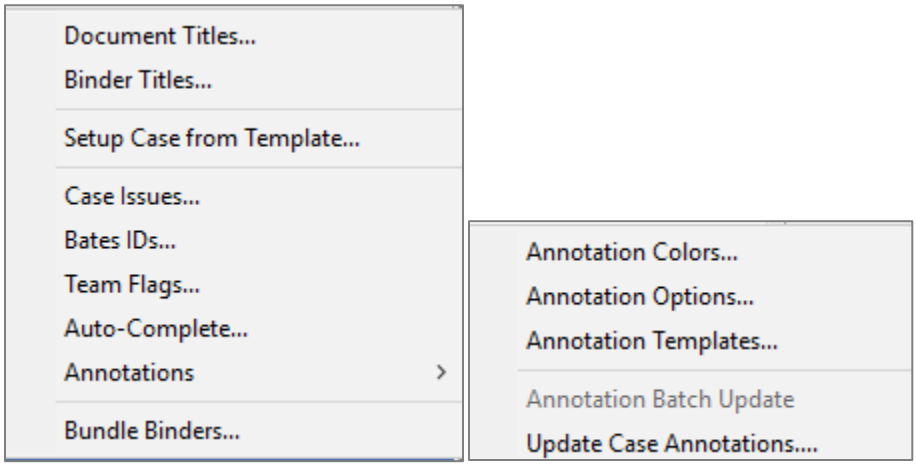
Applying these settings to your Template makes it easier to set up new Cases, as Template settings are applied automatically as the new Case is created. Template settings can also be used to easily update existing Cases.

Where do I add my Case Template Customizations?

Case Template Customizations can be set by clicking on the **Geary**, located at the far-right of the blue **Navigation Ribbon**, accessed by clicking on any Case binder:



When you click on the Geary, the Case Settings menu will appear:



Customize your settings as you would customize a regular Case:

Customizations to

- Case Issues
- Team Flags
- Auto Complete
- Annotations (Annotation Colors, Annotation Options, and Annotation Templates)

will be auto-applied to any new Cases based on the template by default.

Using the **Setup Case from Template** menu option allows you to apply settings from another Case Template or Case to your current Template.

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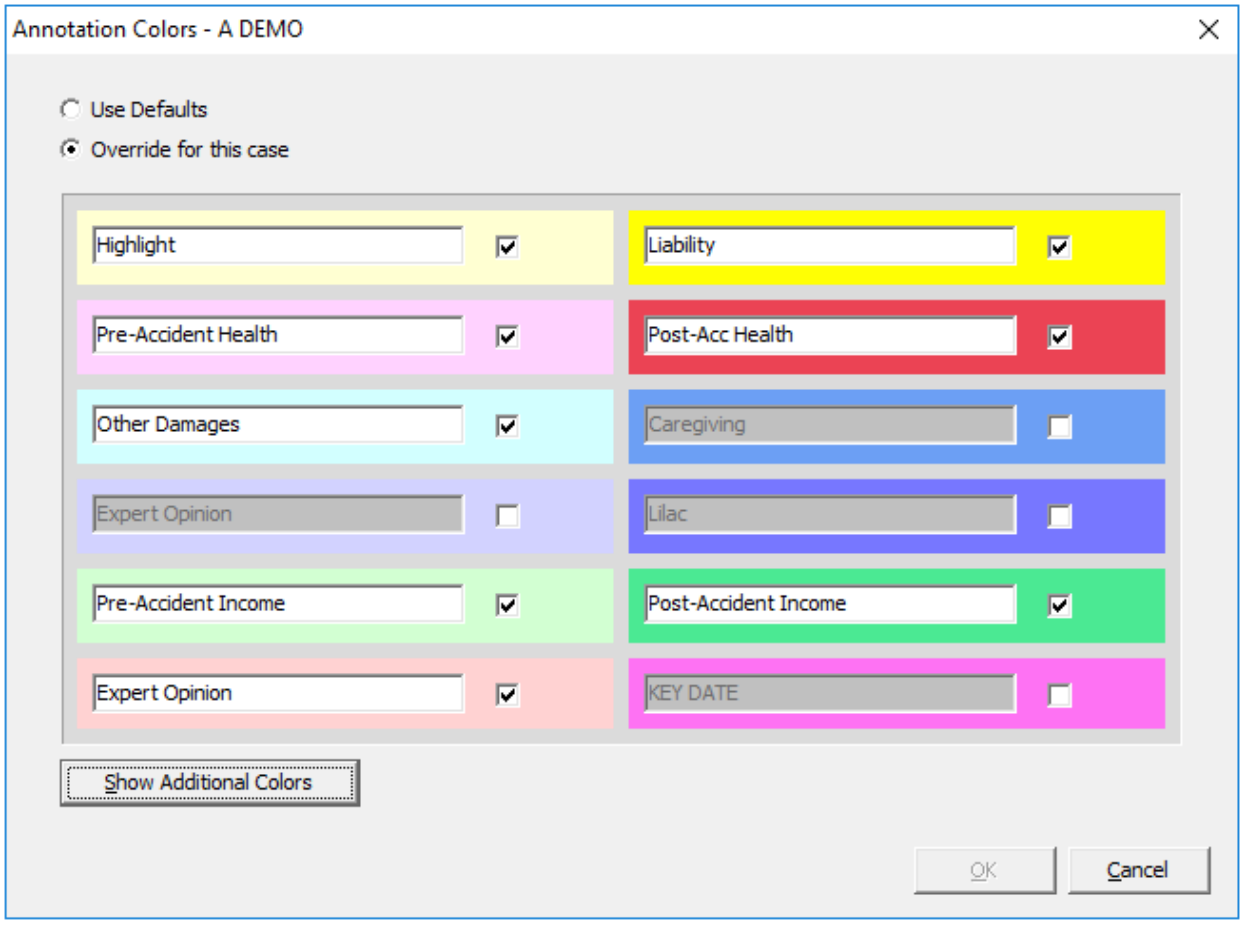
Annotation Color Labels

Customizing your Case Template's Annotation color labels allows color coding to match the requirements of the associated Case type, allowing your team to avoid a "one-size-fits-all" approach to labelling.

To adjust the Annotation Color Labels on your Template:

1) Click the **Geary** on your Case Template's blue navigation ribbon
2) Select **Annotations** > **Annotation Colors**

The **Annotation Colors** selection screen will appear:



3) Twelve (12) colors will be displayed. To see all 18 color options click **Show Additional Colors**.
4) To customize your Case Template's Annotation color values, select **Override for this case**.
5) Check the boxes beside the colors you wish to use on your Case Template

6) Enter your desired label name in the text area.

7) Click **OK** to preserve your changes.

How Updating Global Label Settings Impacts Case Labels

Case Template Annotation labels do not automatically update on your Cases when you change Annotation color label values on the Template – even if only one color differs from the system Default settings.

(To align existing Cases with updated Template label settings, use the ***Setup Case from Template tool***). *See the* *Color Labels: Case Templates vs. System Defaults* Chart above for a detailed description of updated label behavior.)

! Updating Annotation Color Labels on your Case Template will not cause Annotation Color Labels on existing Cases to update automatically.

Annotation Issues

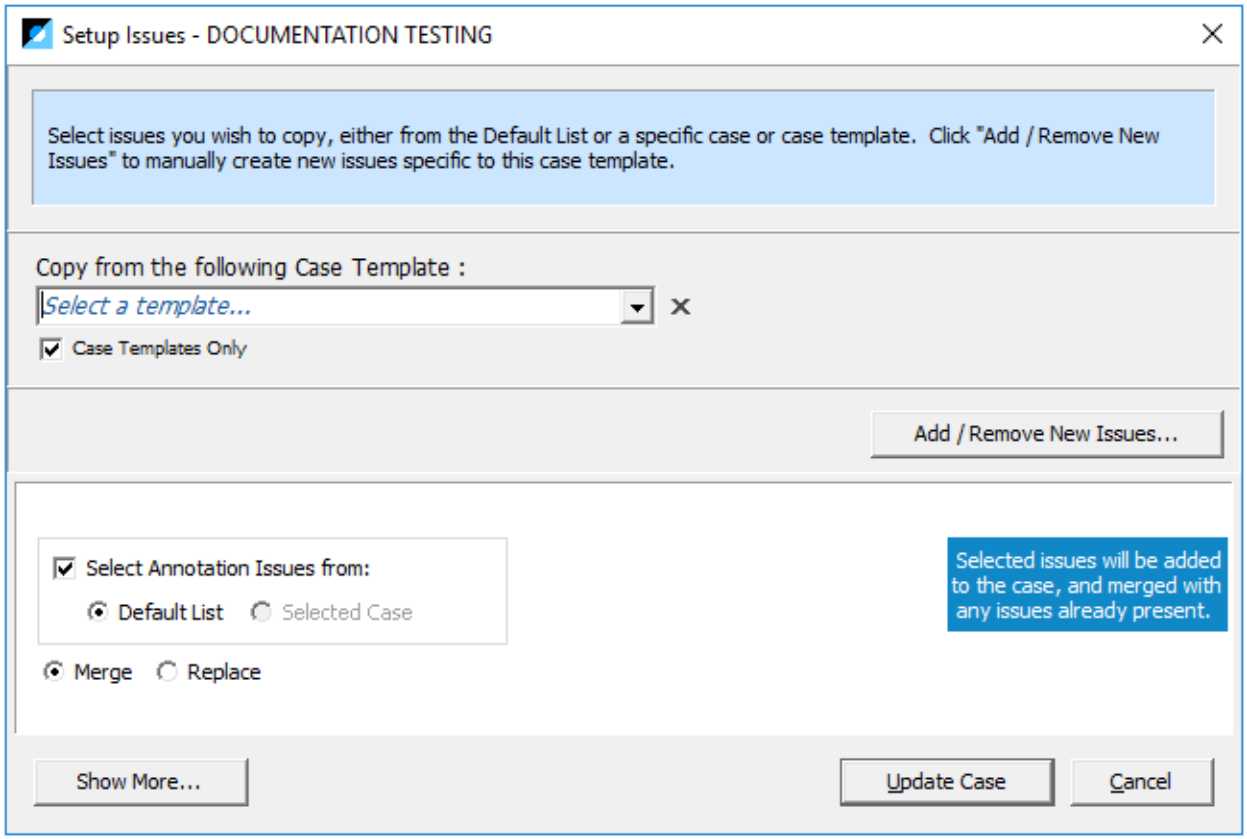
Customizing your Case Template's Annotation Issues allows a set of pre-configured Issues to be automatically applied to Cases, in a single step. (You can add additional Issues to the Case to meet that Case's unique requirements

To adjust the Annotation Issues on your Template:

1) Click the **Geary** on your Case Template's blue navigation ribbon

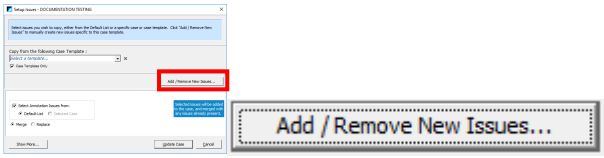
2) Select **Case Issues**

3) The ***Setup Issues*** dialog will appear:

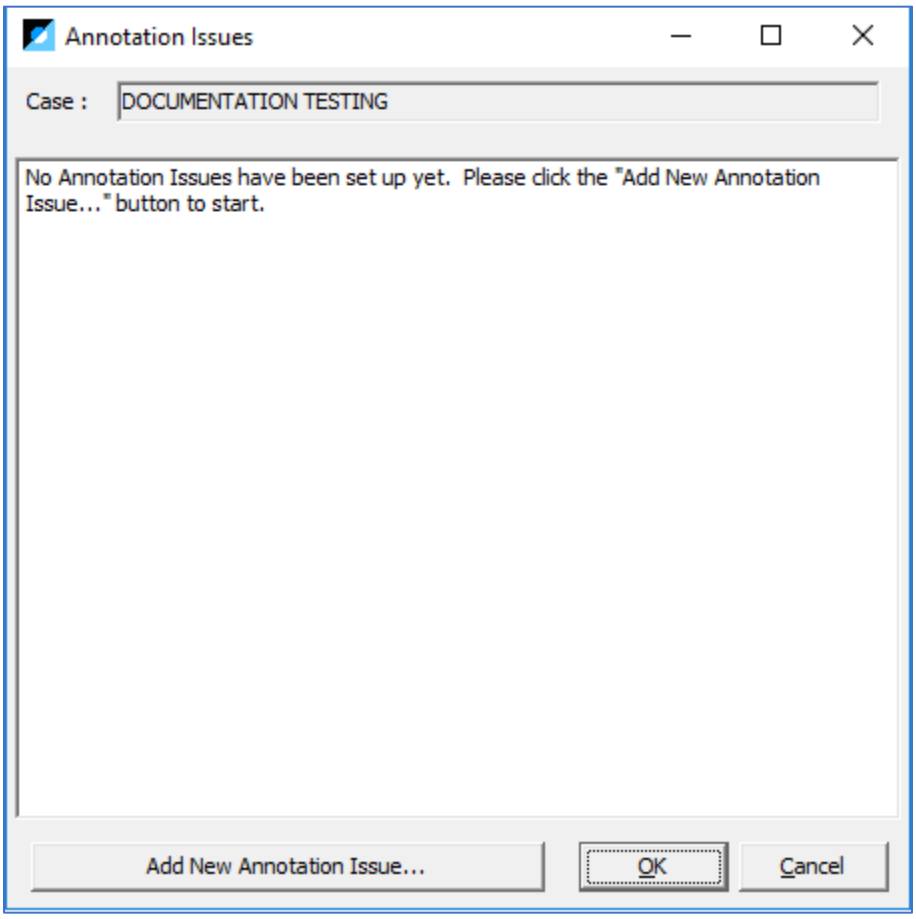


Creating New Annotation Issues for your Case Template

4) Click **Add/Remove New Issues** to set up new Issues for your Template:

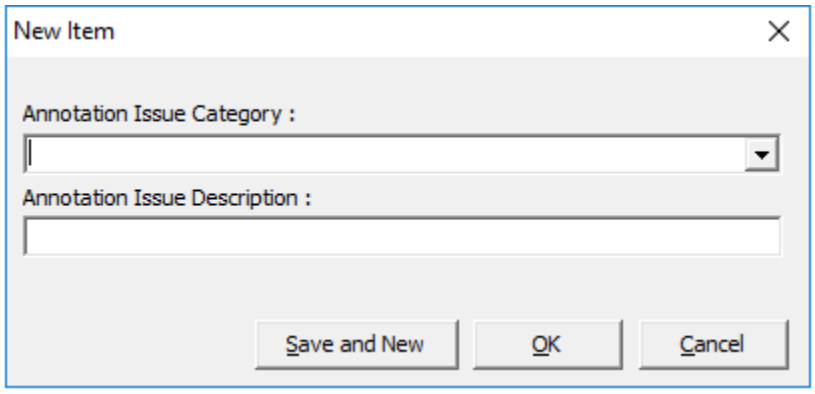


5) The ***Annotation Issues*** dialog will Open:



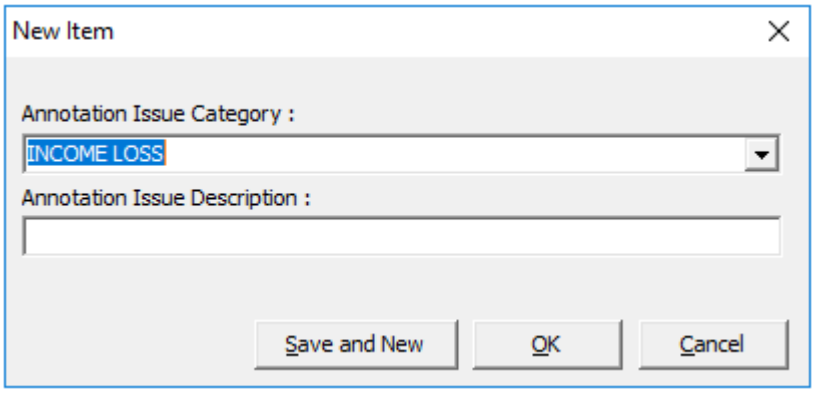
6) Click **Add New Annotation Issue** to begin adding Annotation Issues to your Case.

7) The ***New Item*** dialog will open:

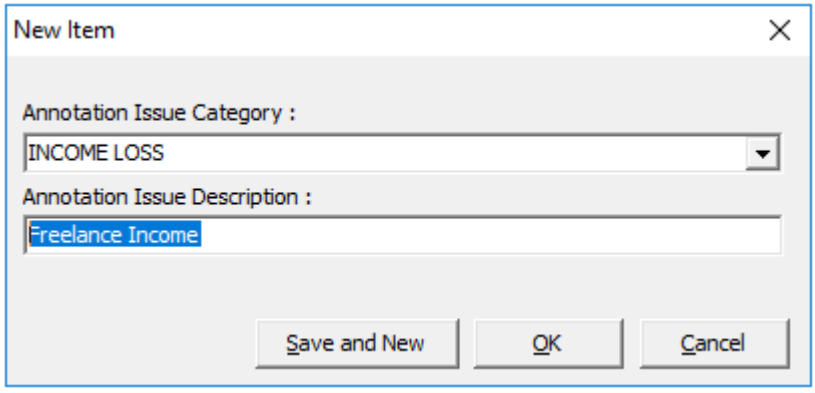


8) Enter an **Annotation Issue Category** Name (Creating Issue Categories allows you to organize your Annotations into manageable sub-groupings.)

   If your Case Template already has Categories, use the **drop-down** to select the desired Issue Category. You can also create a New Issue Category, as desired.



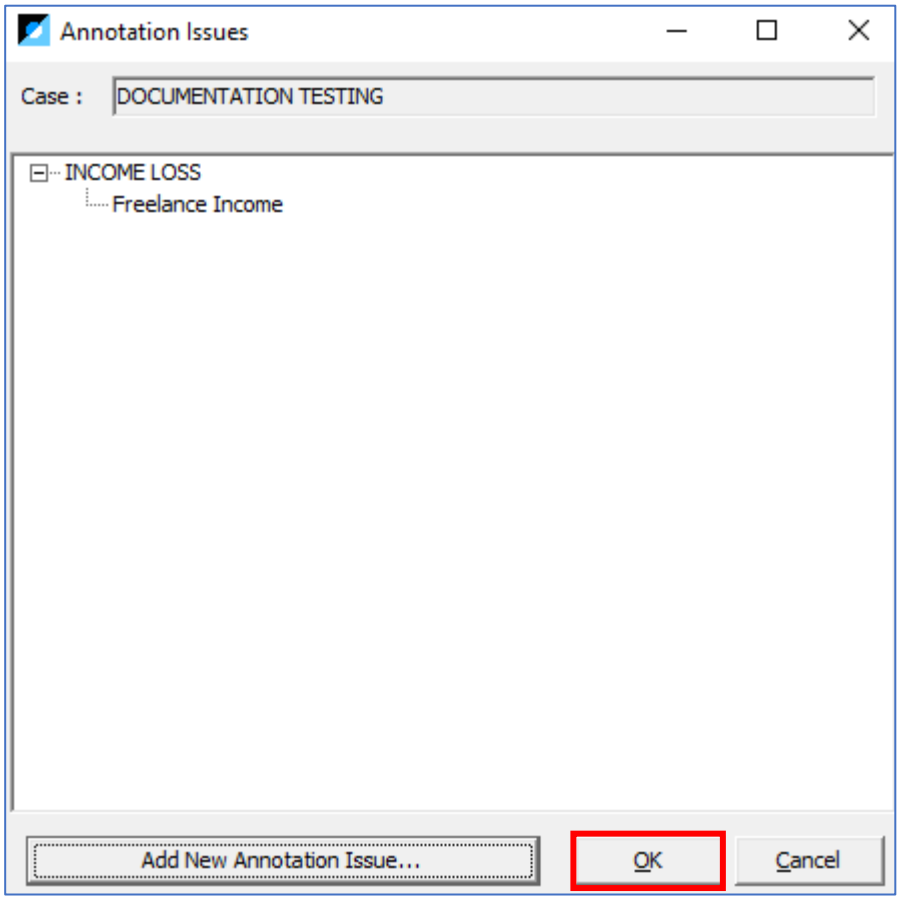
9) Enter the **Annotation Issue Description** – this is the Annotation Issue applied to selected Case Annotations.



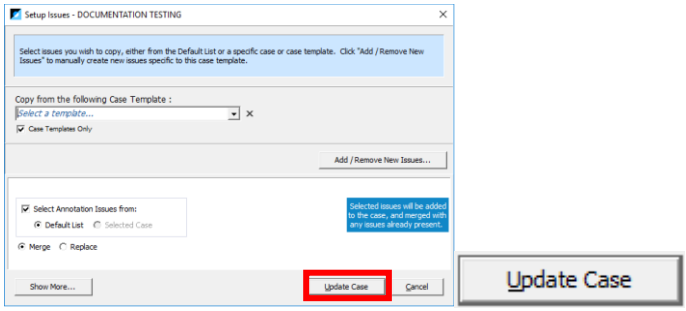
10) When you have finished adding Annotation Issues, Select **OK** to Save.

    If you wish to continue adding new Issues, select **Save and New**, repeating the steps above until you have finished adding your desired Case Template Annotations Issues.

11) Click **OK** on the ***Annotation Issues*** dialog to preserve your added Annotation Issue(s).

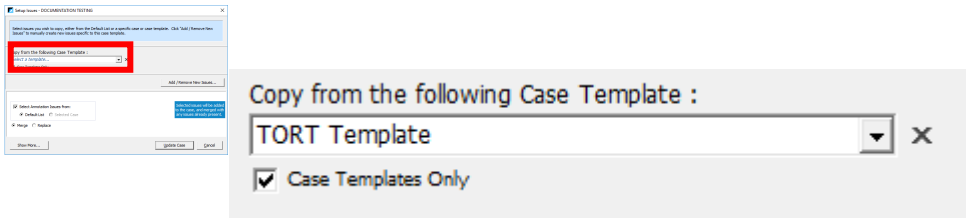


12) Click **Update Case** to complete.

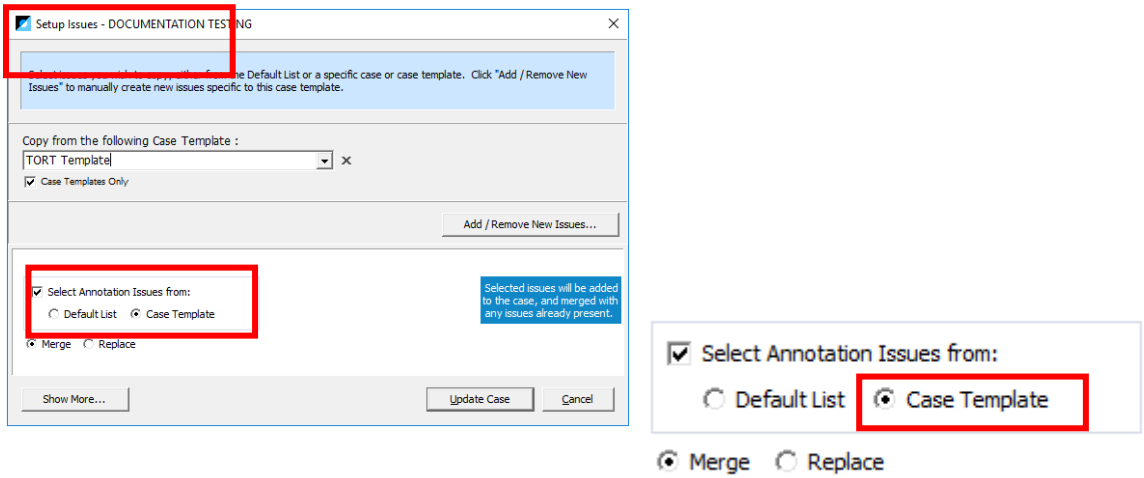


Importing Annotation Issues from a Case Template

13) To import Case Issues from another Case or Case Template, open the ***Setup Issues*** dialog (see Steps 1-3 above) and **select** a **Case Template** using the ***Copy from Case Template*** dropdown:



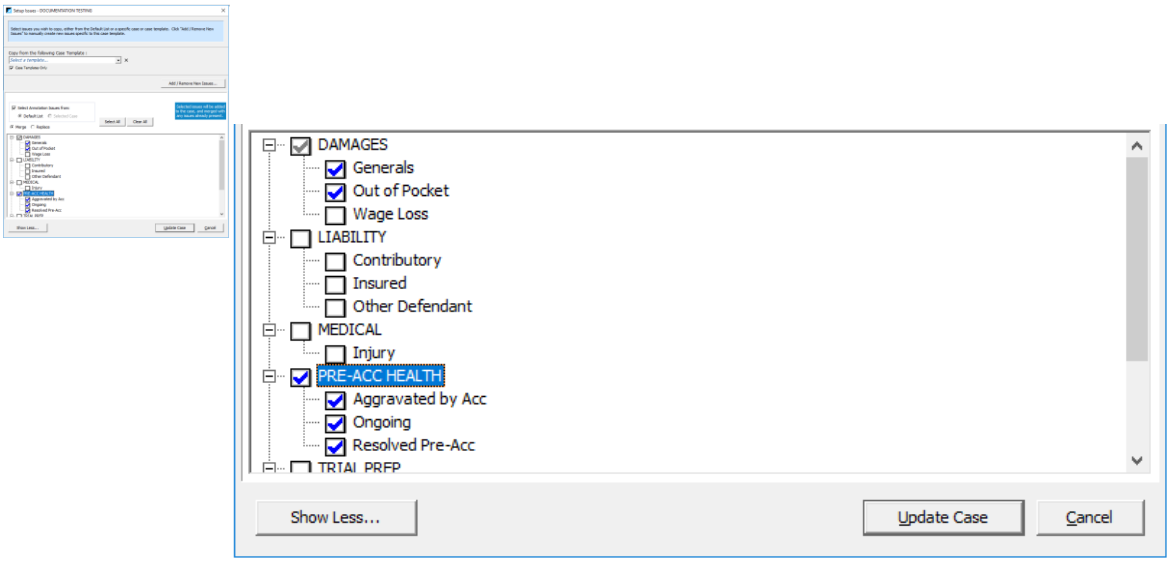
14) In the white area at the bottom of the ***Setup Issues*** dialog, confirm that you are Selecting Annotation Issues from the selected Case Template.



15) Select **Merge** or **Replace**. (**Merge** will preserve any existing Annotation Issues you already have on your Case Template. **Replace** will remove any existing Annotation Issues on your Case Template and replace with the selected values from the Copied Case Template.)

16) Click **Show More**, which will display all Annotations Issues on the Copy Template.

17) Check the **Annotation Issues** you wish to Copy into your current Case Template – Use **the Select All** and Clear All Buttons to batch-select all available Annotation Issues:

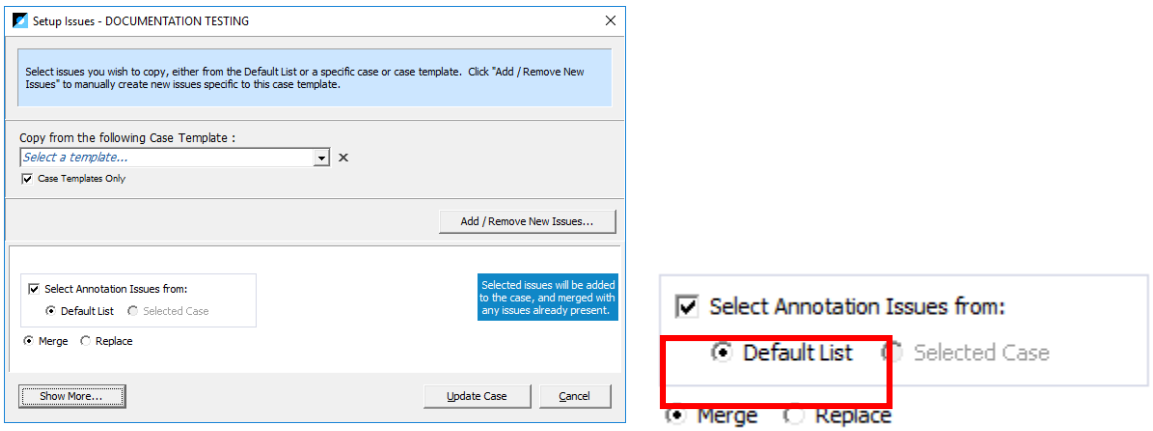


Note: You must click "Show More" and select Issues from the copied Template in order to save them to your Case Template.

18) When you have completed your selections, click **Update Case** to preserve your selections on your current Case Template.

Importing Annotation Issues from the Default List

19) If you have a Default Annotation Issue List in your System and wish to add Annotation Issues from that list into your Case Template, complete Steps 13-18 above, except choose **Default List** instead of Case Template as the basis of your copied selections.



Note: You must click "Show More" to select Issues from the Default List to save them to your Case Template.

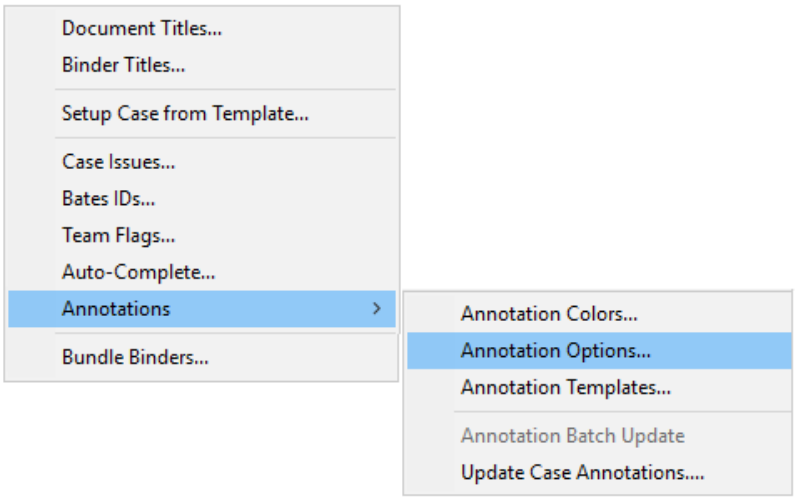
Annotation Event Date and Time

The Annotation Event Date and Time fields capture the timing associated with Case Events, for use in creating Chronologies.

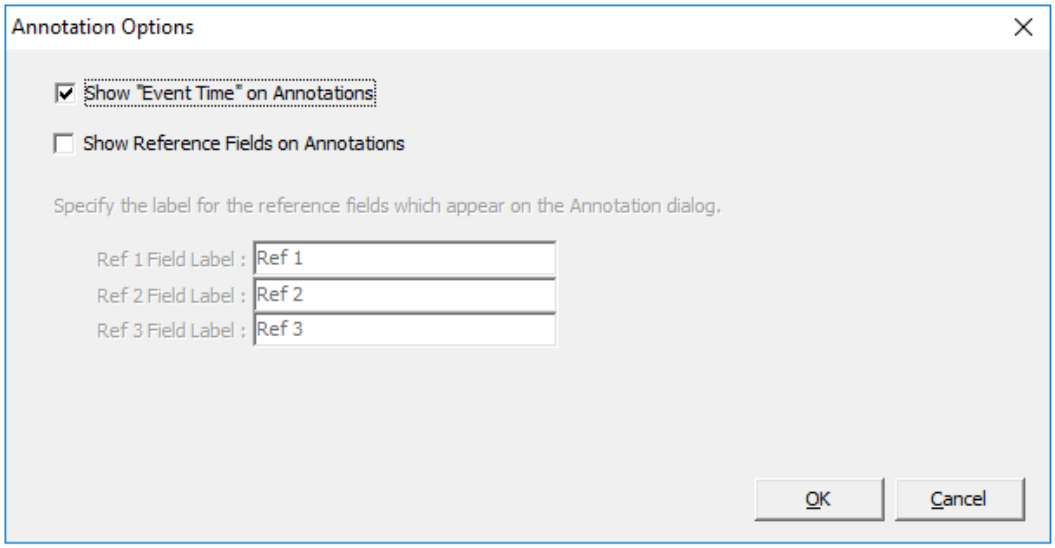
By default, the Annotation Form displays only the Annotation Event Date. You can customize the Annotation Form to include Event Time. This will add the Event Time field to all annotations on your Case.

To add or remove Event time from your Template's Annotation Form:

1) Click the **Geary** on your Case Template's blue navigation ribbon
2) Select **Annotations** > **Annotation Options**



3) The ***Annotation Options*** dialog will open. Select **Show "Event Time" on Annotations** to add this field to the form.



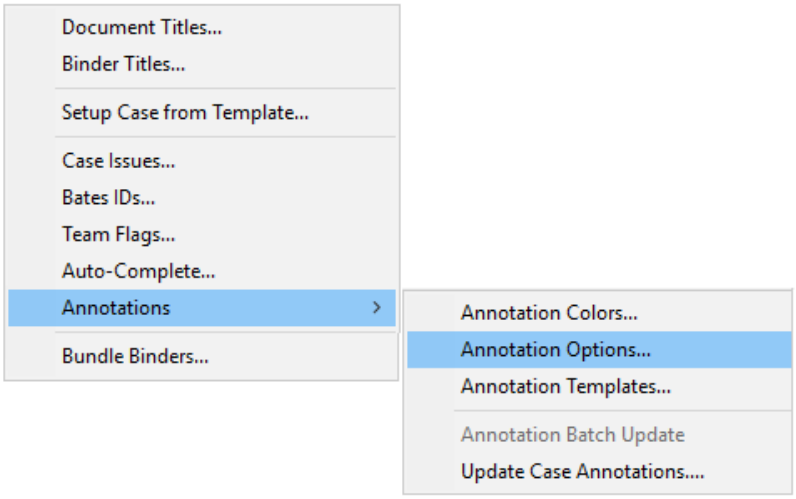
4) Click **OK** to preserve your selection.

Reference Fields

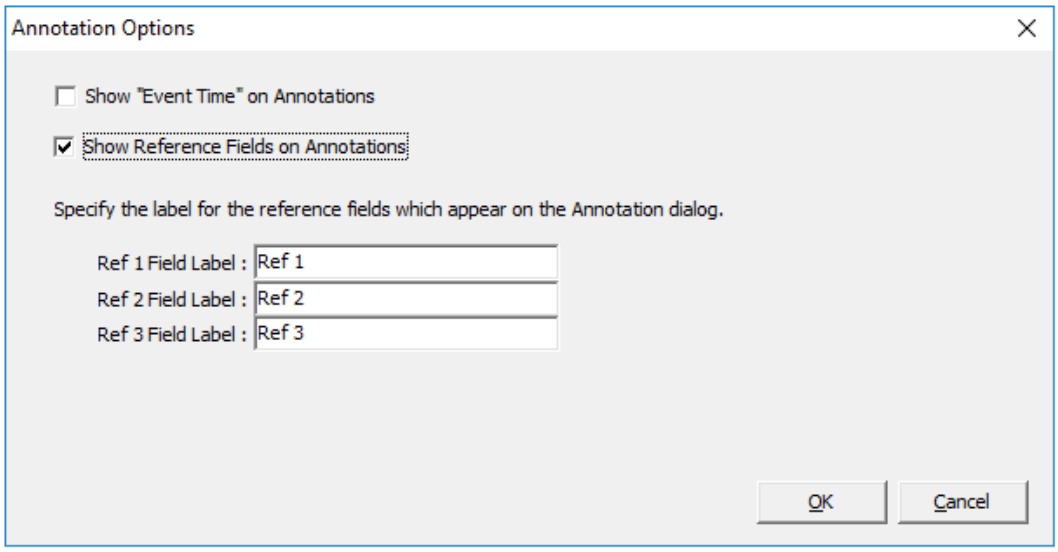
Reference fields provide a few extra customizable fields for additional information your team may wish to add to Annotation forms. These were available on the Annotation forms in Primafact 5, and are hidden by default in Primafact 6. These fields can be added to your Case Template for capture of additional information as desired.

To add Reference Fields to your Template's Annotation Form:

1) Click the **Geary** on your Case Template's blue navigation ribbon
2) Select **Annotations** > **Annotation Options**



3) The ***Annotation Options*** dialog will open. Select **Show Reference on Annotations** to add these fields to the form.



4) Customize Field Labels as desired (recommended for consistency of content entries).
5) Click **OK** to preserve your selection.

Team Flags

Team flags allow you to identify documents with specified attributes. Adding a Label ensures consistent application of Team Flags, which assists when filtering and visually identifying content.

Team flag labels can be customized as system defaults, and by Case. When added to your Case Templates, suitable values can be automatically added to your Cases, to reflect the requirements of that type of Case (for example you may flag Liability documents in a Tort Case, which you may not require in an Accident Benefits Case).

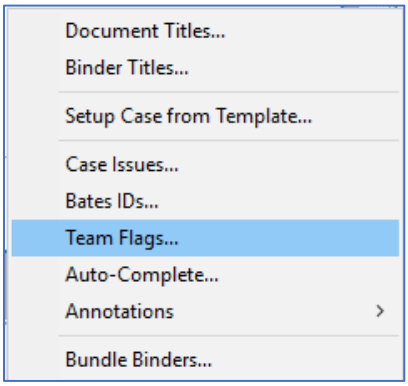
Team flags can be used to identify attributes such as:

- Inbound vs. Outbound documents
- Documents satisfying Undertakings
- Selected documents to add to a brief

You can customize Labels completely flexibly; however, it helps to apply commonly used flag labels to the same color across Cases to make user identification more efficient.

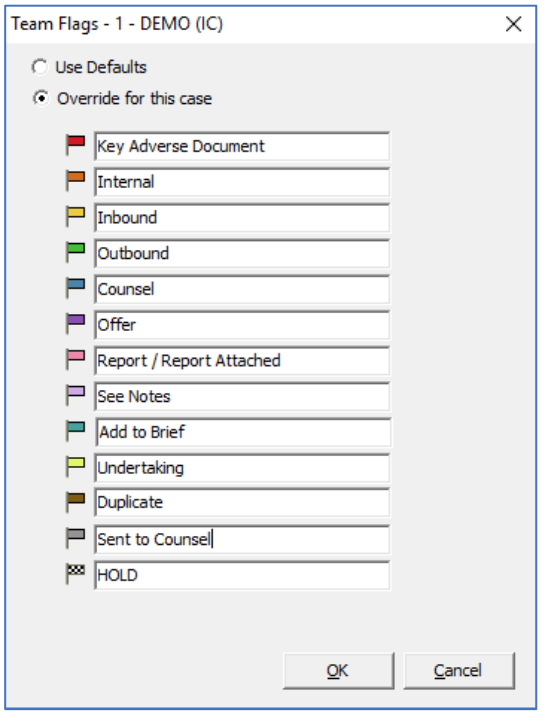
To adjust the Team Flag Labels on your Template:

1) Click the **Geary** on your Case Template's blue navigation ribbon
2) Select **Team Flags**



3) The Team Flags dialog will open.
4) Choose **Override for this case** to add your own Team Flag label values.

5) Enter your desired Team Flag labels (labels below are an example, but feel free to develop your own preferred settings).



6) Click **OK** to preserve your selections.

How Updating Global Label Settings Impacts Case Labels

Case Template Team Flag labels do not automatically update on your Cases when you change Annotation color label values on the Template – ***even if only one color differs from the system Default settings.***

(To align existing Cases with updated Template label settings, use the ***Setup Case from Template tool***). *See the* *Color Labels: Case Templates vs. System Defaults* Chart above for a detailed description of updated label behavior.)

!

Updating Team Flag Labels on your Case Template will not cause Team Flag Labels on existing Cases to update automatically.

Saved List Views

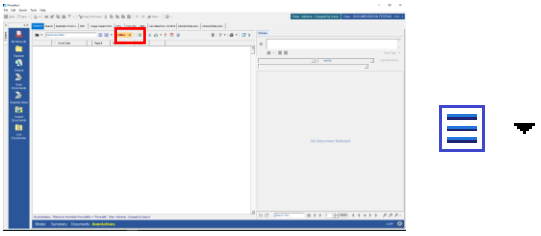
Saved List Views make it easy for users to adjust their list displays to suit their requirements – and to quickly switch views as needed to more easily perform different activities in Primafact. Creating Saved List Views on your Case Templates makes it easy to set up Cases with suitable Views immediately available to all users. You can even set a Default Case Home View with settings fine-tuned to your team's top Case review requirements.

Creating Saved List Views on a Template is done the same way as you would create a Saved List View on a Case.

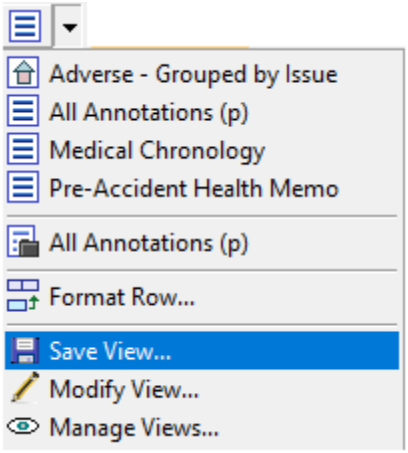
Create a Saved Annotation List View on your Template

1) Start by going to your Case Template's Annotation List View, which can be accessed by clicking the **Annotation** text button located on the blue ***Navigation Ribbon***, found at the bottom of any Case binder:

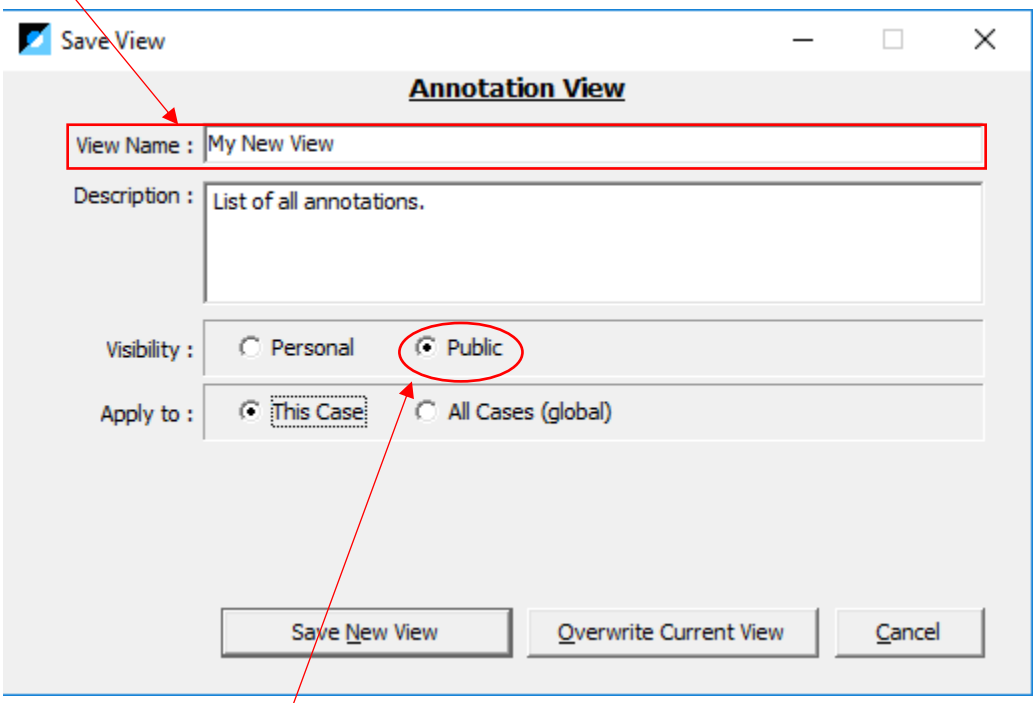
2) Click the ***Saved List View*** dropdown on the Annotation List toolbar



3) Select **Save View**



4) Name your new View in the View Name Field and add an optional description.



5) Set ***Visibility*** to **Public**.

6) Select ***Apply to*** **This Case**. This restricts availability of this View to your Template, and to any Cases created or updated using this Template. This is useful if your View is suited to your template's Case Type, but not to all Cases.

   (If you select ***Apply to*** **All Cases**, the view is available Globally. This can be helpful if you are creating a truly Globally-useful view.)

7) Click the **Save New View** button to preserve your new View.
8) You can now make adjustments to the View, using field selection and filters *(See **Working with Primafact 6 New Feature User Guide*** and our Tutorial video, ***Creating Saved List Views***.)[4]

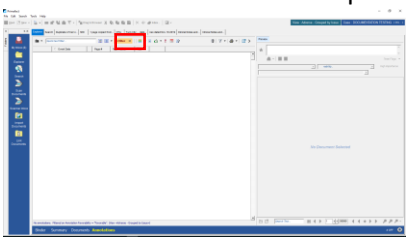
[4] ***Creating Saved List Views Video Tutorial*** can be found at https://www.primafact.com/primafact-6-tutorial-saved-list-views.

Setting A Default Home *View*

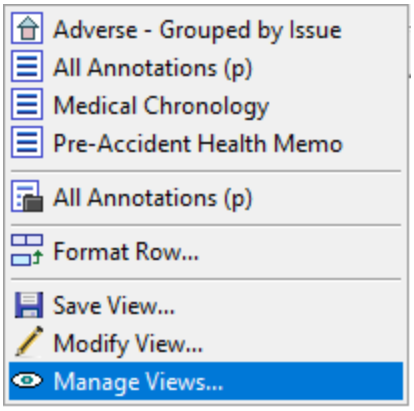
The List Home View is the default list view that is displayed when you first land on the List View, or when you click the Home button on the List toolbar.

You can set a Saved View as the default List Home View.

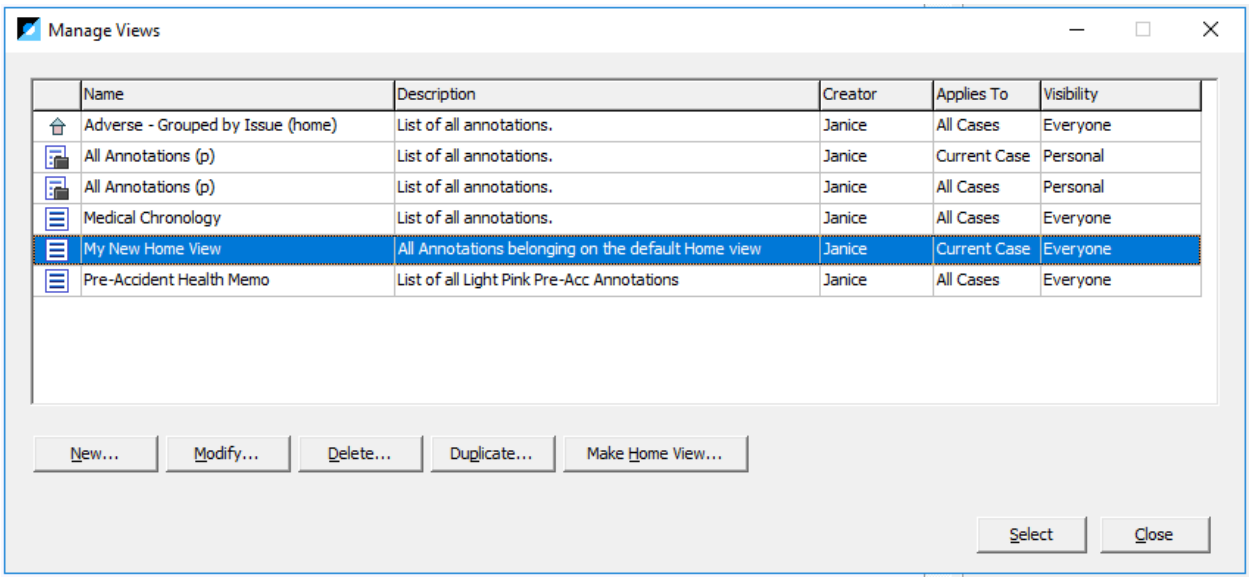
1) Click the ***Saved List View*** dropdown on the List toolbar



2) Select **Manage Views**.



3) The ***Manage Views*** Dialog will appear.

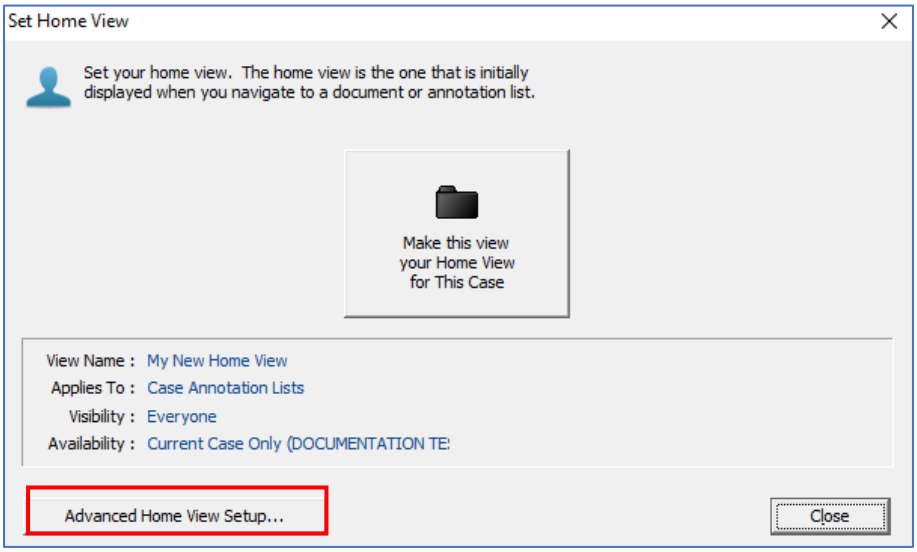


4) Click on the View that you would like to set as your Default Case Home View for all Users.

5) Click the **Make Home View** button.

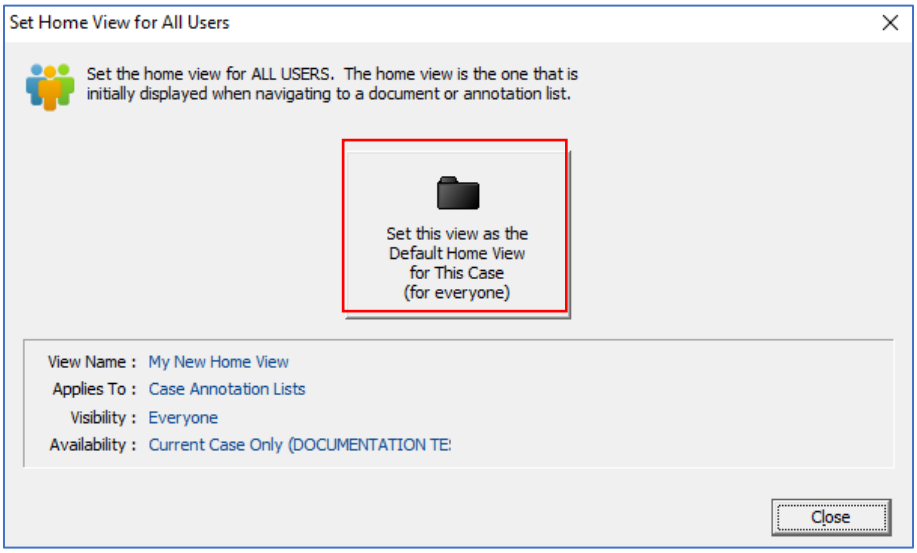
6) The ***Set Home View*** Dialog will appear.

7) Click the **Advanced Home View** Setup button



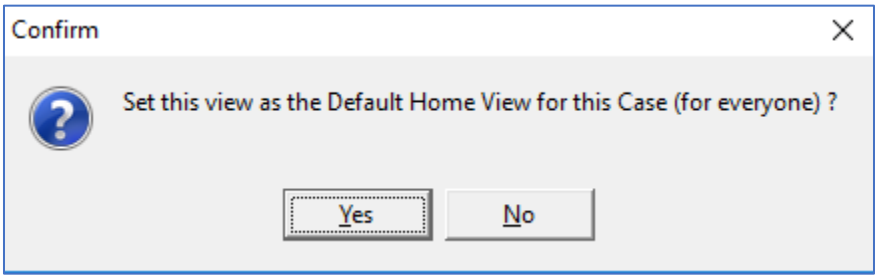
8) The ***Set Home View*** For all Users dialog will appear.

9) Click the **Set This View as the Default Home View** Button. This will set this view as the Default Home View for all users.[5]

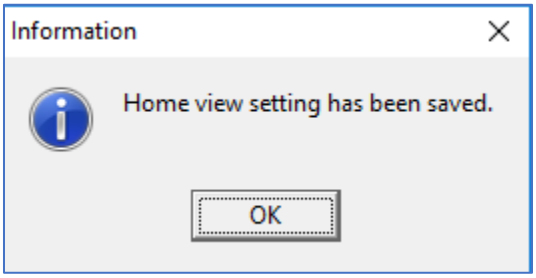


[5] Users can change their Home Views independently if they wish.

10) Click **Yes** to confirm.



11) Click **OK** to Close the Information dialog



12) Close the Manage Views dialog.

13) You will see your Home View has been changed to your selected view. This will be the initial Home View for all new Cases created using your Template.

Setting Case Permissions

Case Permissions help to protect Case data integrity by allowing firms to control each user's ability to adjust Case Setup settings and to update annotations using the Batch Coding utility.

What Case Permissions Control

Case Permissions are ***Case Level*** settings that control a user's right to:

- Change case permissions
- Adjust Case Setup settings and
- Perform Batch Updates on the Case.

Case Administration:

- This is the most powerful permission. Enabling the Case Administration setting allows a permitted user to change any of the Case permissions available on this screen, for any user.

Case Setup:

- When the Case Setup permission is enabled for a user, they have permission to "Setup Case From Template", adjust Annotation Colors, Annotation Issues, Annotation Options, Annotation Templates and Team Flags for the Case, and to Add "Document Titles", "Binder Titles". Users with this permission enabled can also set "Bates ID" & enable "Bundle Binders.

Perform Batch Updates:

- Enabling Batch Updates allows a user to update multiple annotations in one operation.

  NOTE: Since Batch Coding does not have an "undo" option, most teams will want to restrict Batch coding rights to carefully defined users to prevent the unintentional destruction of annotation data.

Changing Case Permission System Default Settings

Case Permissions system settings are configured on the **LS.ini** file located at the Primafact server. The default Case Permissions are set as:

AllowCaseAdministrationByDefault=**No**

AllowCaseSetupByDefault=**Yes**

AllowBatchUpdatingDefault=**No**

To enable different default system settings, you will need to adjust the LS.ini file, with assistance from your firm's IT manager.

Note **Case Permissions for Case Templates will override system settings when applied to new Cases.**

Also, any user permissions enabled on the Case Templates will allow permitted users to make associated changes to the Case Templates, as well as to Cases configured using the templates.

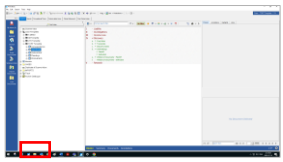
Setting Initial Case Permissions on the Case Template

Applying Permissions to the Case Template sets standardized user permissions anytime you create a new Case based on the Template. (Currently you cannot use Case Templates to quickly update permissions on an existing Case.)

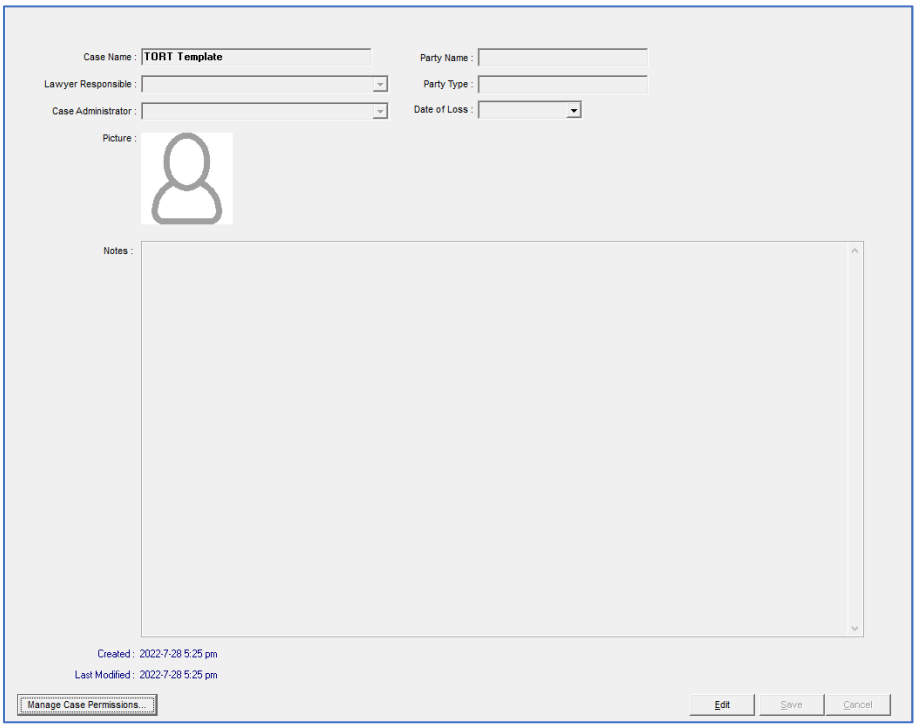
Keep in mind that users granted Permissions on the Case Template have can use those same permissions on the Case Template itself, as well as the Cases created using the Template's Case Permissions settings.

To change Case Permissions on the Case Template:

1) Start by going to your Case Summary Screen, which can be accessed by clicking the **Summary** text button located on the blue ***Navigation Ribbon***, found at the bottom of any Case binder:



2) The ***Case Summary*** screen will appear.

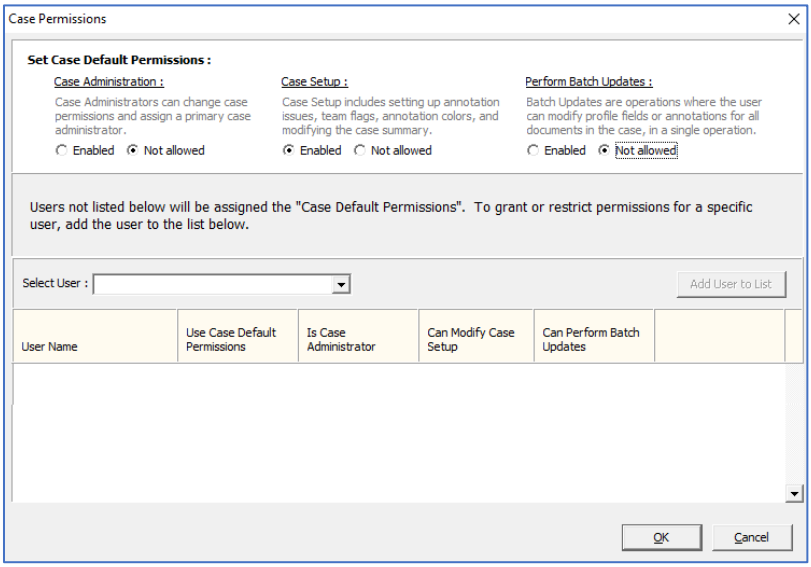


3) To manage Case Permissions, a Case Administrator must be named in the Case Administrator field. If no name appears in the field, Click the Edit button, and enter your name in the **Case Administrator** field in the top left area of the screen. (Additional Case Administrators may be named to the Case later on).

4) Click **Save** to preserve your changes.

5) Click the **Manage Case Permissions** button at the bottom-left corner of the screen.

6) The ***Case Permissions*** dialog will open.



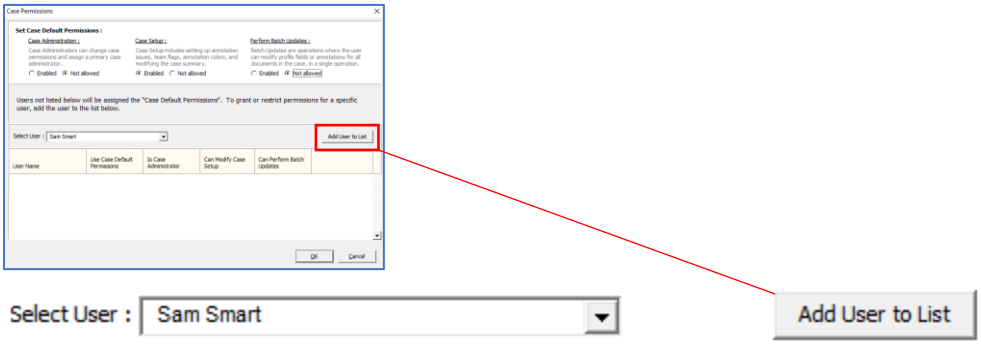
7) The settings at the top of this dialog, under ***Set Default Case Permissions*** govern default settings for any user not listed in the table area at the bottom of the dialog screen. (Exception: The person named as the Case Administrator on the Summary screen will have Case Administration rights, even if that person is not listed on the table.)

If you change these settings, users not listed on this table will be assigned the updated permissions for the Template when a new Case is created, based on the Template.

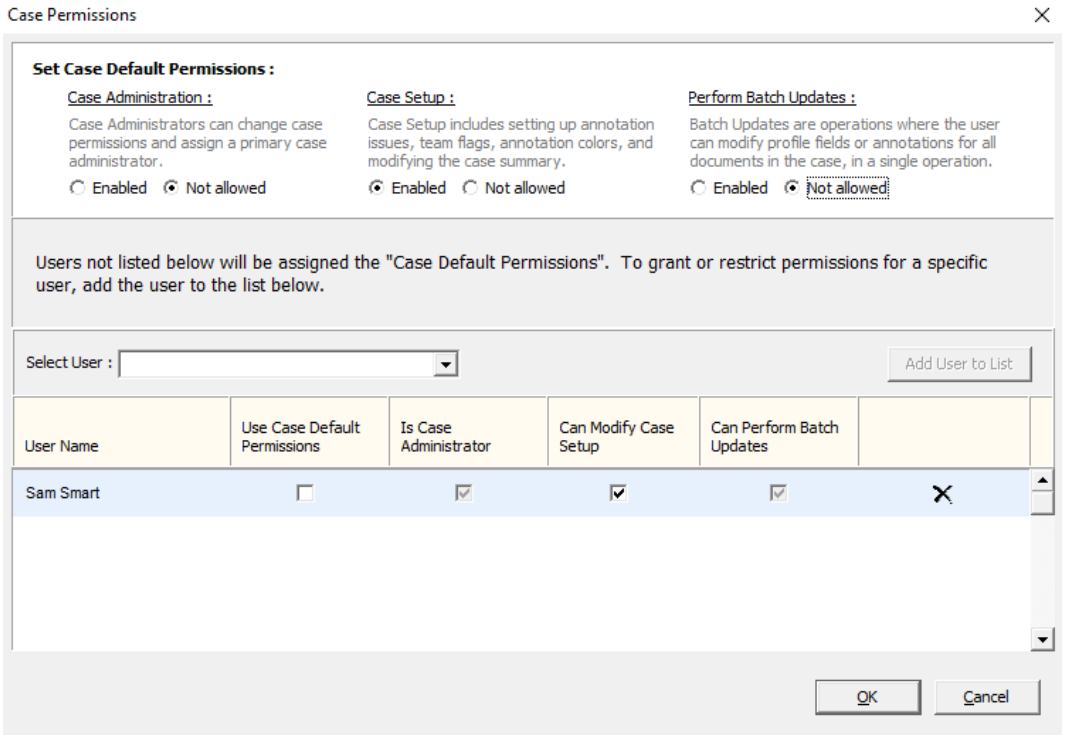
Note if you update the Template, default Permissions will <u>not</u> be automatically updated for existing Cases created earlier using the Template.

8) To grant different permissions to individual users, select that user using the **Select User** dropdown.

9) Click the **Add User to the List** button.



10) The user's name will appear on the table.



11) Click on the **checkboxes** to enable desired permissions for the selected user.

12) Click OK to preserve your settings.

NOTE: *If you assign a User the permissions that match the Case's Default Permissions, that user will be removed from the Table.*

Using Case Templates to Create and Update Cases

For details on how to us use Case Templates to create new Cases and update existing cases, see

- ***Working with Primafact 6 New Feature User Guide***
- ***Using Case Templates*** (Primafact 6 Video Tutorial)[6]

User Resources

Visit our Primafact 6 Resources Page for User Guides and Tutorials: https://www.primafact.com/pf6-resources.

Consulting and Training Services

We offer Primafact 6 Upgrade Planning, Configuration and Training Assistance to help your team get the most from your Primafact investment. Contact our Customer Success Team at customersuccess@primafact.com.

[6] ***Using Case Templates Video Tutorial*** can be found at https://www.primafact.com/primafact-6-tutorial-using-case-templates .