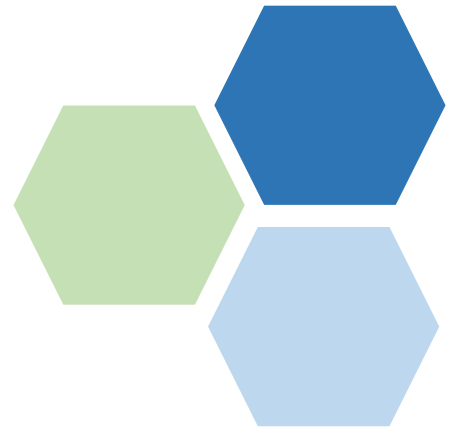


Primafact 6 Planning Guide Your Primafact 6 Upgrade



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About this Guide

This Guide is aimed at Primafact Administrators and team leaders, to help identify Primafact 6 features that your team will be using, how the features will be used, and program areas to customize and configure prior to Primafact 6 installation.

While your team can “phase in” additional features and configurations over time, it is helpful to identify any goals and related requirements early on, to assist the team in unified training and implementation.

Your Team's Goals

Your goals should be identified prior to planning any of the new features. This helps to ensure your configurations support the outcomes you wish to achieve, and also helps to prioritize objectives, so your team's time and effort is directed to goals that will deliver the most favorable impact.

How to Use This Guide

This Guide is designed to help you determine which Primafact 6 features your team will use, and identify associated program customizations that you will need to configure.

- The [New Feature Overview Chart](#) provides a brief overview of what's new in Primafact 6, to help you identify features your team is interested in using.
- Use the [Feature Selection Worksheet](#) to record the features you'd like to use – the Worksheet includes some tips on implementation and links to associated implementation guides and tutorial videos.
- The [User Resources](#) section connects to our Primafact 6 Resource Center, which includes User Guides and Tutorial Videos for user reference and training.

New Feature Overview

Primafact 6 includes many new features designed to promote improved team efficiency and get users “up to speed” faster when preparing for important activities and events.

Many of the new features are “team oriented,” to help deliver consistencies across Cases. These will require teams to consider and implement unified standards, including coding labels and system defaults.

| New Feature | How it Works | Get Ready | |
|---|--|---|--|
| Binder Enhancements | <p>Primafact Binders now make it easier to identify specific content, with visual identifiers, full-text search, and filter tools available directly in the Binder.</p> | <ul style="list-style-type: none"> • Users can customize their Binder views to display document details they want to review. • Filter and text search Binders | <ul style="list-style-type: none"> • Set up personal view customizations to match coding preferences and workflows (done by individual users) |
| Chronologies & Reports | <p>Prepare for appearances and meetings more productively with “one-click” chronologies and discovery prep charts – viewable on demand and exportable to Word, Excel, and other formats.</p> | <ul style="list-style-type: none"> • Use filtered Annotation list views to instantly assemble documentary evidence to understand specific Case issues. • Page references link directly back to Primafact for instant access to document content. | <ul style="list-style-type: none"> • Consider reports you’d like to use, and design views to match • Create Saved Annotation List Views • Configure Annotation coding to capture information used in Reports (<i>See Annotation Enhancements below</i>) |
| Annotation Enhancements | <p>Expanded coding options and an updated Annotation Form make it easier than ever to flag key content for future review.</p> | <ul style="list-style-type: none"> • Expanded Annotation Color Coding (18 available colours) and customizable labels make it easier than ever to efficiently code and identify annotation content. • Dedicated Event Date field captures date + time information for instant chronologies | <ul style="list-style-type: none"> • Determine Annotation Colors and Labels • Determine Annotation Issues for more granular identification and retrieval • Will you update existing annotations with new coding? (Batch Coding + Permissions) |
| Annotation Enhancements – Efficiencies | <p>Annotation Templates make creating routine annotations more efficient and consistent.</p> | <ul style="list-style-type: none"> • Pre-filled Annotation Templates can be used to create annotations in a single click. Use shortcut keys for even faster coding. | <ul style="list-style-type: none"> • Consider coding values that users apply repeatedly as the basis of Annotation Templates |

New Feature

How it Works

Get Ready

Team Flags

Team Flags instantly identify document-level content making it easier to select groups of documents.

- Easily identify documents by content type (e.g. Undertakings, Offers) or use in workflows (e.g. include document in an Affidavit schedule or brief). Team flag filters identify documents instantly in binders and lists.

- Consider document sets you want to find easily
- Consider purpose for identifying content (e.g. assembling a brief, reviewing correspondence) to determine useful flags. Team flags can be included to list views for an additional layer of document information
- Determine Team Flag Colors and Labels

E-Briefs

Primafact's new e-brief tools make it easy to assemble and share Court-ready content directly from Primafact.

- Highlighting tool adds sharable emphasis to your documents
- Add exportable links to external websites (CanLii and more), and to other Primafact documents
- Title aliases make it easy to apply CaseLines and other court-compliant document naming protocols to your documents on-demand
- Export binders as tabbed PDFs at the touch of a button

- Consider any naming protocols used when submitting documents to courts and other venues
- You may wish to set up special profile fields for document Autonaming

| New Feature | | How it Works | Get Ready |
|--------------------------------------|--|---|--|
| Inbox Review & Discussion | Primafact 6 Inboxes support document intake workflows with integrated discussion and review tools | <ul style="list-style-type: none"> • Dedicated user inboxes & tools make it easy to send, receive, and discuss Primafact documents • New review tools make it easy to manage team activities • Customizable views make it easy to organize documents for different tasks | <ul style="list-style-type: none"> • Consider whether any intake workflows need to be created or modified • Consider how your team will use the new Review tools and Discussion capability to provide document details and instruction • Consider intake, triage and review activities that could benefit from custom Inbox views |
| Case Templates Productivity | Case Templates make it faster and more consistent to set up new Cases by gathering settings such as binders, coding, and list views. | <ul style="list-style-type: none"> • Use Case Templates to automatically apply coding values and views to new and existing Cases | <ul style="list-style-type: none"> • Update existing Case Templates to new format • Instruct Teams on the new Case Creation Dialogue • Will you update existing Case coding to match Template Annotation and Team Flag coding? |
| Portal Uploads Productivity | Upload documents directly from Primafact to online Portals with a simple “Click” + “drag” | <ul style="list-style-type: none"> • The Portal Upload Tool makes it quicker than ever to select and upload materials from Primafact directly into online portals, including document exchange platforms and <i>CaseLines</i> | <ul style="list-style-type: none"> • Consider the platforms you use – Title Aliases can help to apply compliant document titles in a single click • Consider adding required Profile fields to instantly populate Title aliases with suitable content |

New Feature

Date of Loss Field
Productivity

Add the Date of Loss to Cases for improved document filtering

How it Works

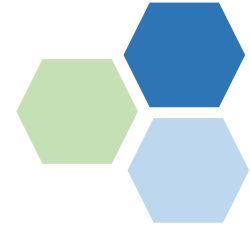
- The Date of Loss field in the Summary Screen provides an easy DOL reference on every Case Binder and List View, and can be used to filter documents based on pre-and post-accident occurrence


Get Ready





- Add the DOL to each Case Summary screen

Feature Selection Worksheet

Use the worksheet on the following page to identify the features you wish to use. Click the links to view associated customization details.



| Feature + Description | Your Selections & Notes |
|---|--|
| <p><input type="checkbox"/> Case Templates Case Templates can now be packaged along with coding colours, labels and customized Views for consistent coding and reports.</p> <p>At minimum, we recommend migrating existing Case Templates to the Case Template Folder.</p> <p>Adding Coding to your Case Templates makes it easy to benefit from coding standards across Caseloads.</p> <p>Note you can include Case Permissions in Case Templates.</p> <p> Watch Case Templates Video</p> | <p><input type="checkbox"/> Template 1: _____</p> <p><input type="checkbox"/> Template 2: _____</p> <p><input type="checkbox"/> Template 3: _____</p> <p><input type="checkbox"/> Template 4: _____</p> <p>NOTES:</p> |

| | |
|---|--|
| <p><input type="checkbox"/> Chronologies & Reports Consider what kinds of Reports you will want to use for more efficient Case preparation– this will determine your Annotation Coding selections, and which fields to add to your Annotation List Views.</p> <p>* If you already create evidentiary charts, consider generating these out of Primafact. Please share a sample.</p> <p>* Align report requirements with Annotation Coding settings</p> <p> Watch Creating Saved List Views Video</p> <p> View Planning Guide</p> | <p><input type="checkbox"/> Adjust Default List Views (Optional)</p> <p><input type="checkbox"/> Create List Views for Chronologies and Reports e.g..Pre-Accident Health Chronology (General or filtered by specific issue)</p> <p>Sample Fields: Date   Issue/Note Clinician Doc/Page Ref Excerpt</p> <p>NOTES:</p> |
|---|--|

Feature + Description

Your Selections & Notes

Annotation Enhancements

Consider using global firm standards, along with distinct requirements for Case Templates and individual Teams

18 Colors are available for color coding.

Color coding can be used to identify Issues (e.g. Pre-Accident Health, Diagnoses, Liability etc.) or “hot buttons” – Witness Question; Expert Opinion; Requires Investigation etc.



[Watch Annotation Enhancements Video](#)



[View Planning Guide](#)

- Decide on color coding + labels globally
- Decide on color coding + labels for different Case templates
- Add annotation colors + coding labels to global settings and applicable templates
- If your practice area requires event chronologies to record time to the minute/second, add Event Time to your Template and Case Settings

NOTES:

Annotation Enhancements – Efficiencies

Annotation Templates make creating routine annotations more efficient and consistent.



[Watch Annotation Template Video](#)

- Consider adding templates for repetitive annotation coding, such as recording treatment dates.

NOTES:

Feature + Description

Your Selections & Notes

E-Briefs

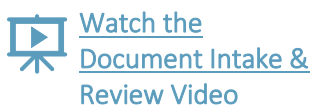
Primafact's new e-brief tools make it easy to assemble and share Court-ready content directly from Primafact.



Set up Title Alias Auto-Naming if desired

Inbox Review & Discussion

Primafact 6 Inboxes support document intake workflows with integrated discussion and review tools



Consider Updating Inbox Intake Workflows

Consider creating Saved Views for Inboxes

Consider adding Folders to Inboxes

Consider using the Review Tracking Tools for review management & delegation

Communicate Workflow and Review Expectations to your Team

NOTES:

Batch Annotation Updates

Consider updating existing Cases to match updated Templates using Case Template update tool & Batch Coding

Complete desired Case updates

Set User Permissions to Batch Update Annotations as applicable

Feature + Description

Your Selections & Notes

Training

Ensure your Team is trained on the new tools



[Watch Primafact 6 Tutorials here](#)

- User tutorials are available at <https://www.primafact.com/pf6-resources>
- Primafact offers additional live user training options.

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.