

# Primafact 6 Planning Guide Inbox Document Review Workflow



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## About Primafact Inboxes

Primafact's new Inboxes are set up for individual users to receive

- ✓ Documents
- ✓ Messages related to Primafact documents

Primafact Inboxes include new features designed to facilitate team workflows, including:

- ✓ Early Case Assignment (relates documents to their Case for Coding & Inbox management)
- ✓ Review Tracking (Assign for review, mark done)
- ✓ Move/Copy documents to other users' Inboxes
- ✓ Send document messages
- ✓ Inbox Views (filters, groupings, field selection)

## Workflow

- ✓ What does the Intake workflow look like?
  - When is a document reviewed
  - By whom?
- ✓ Who distributes documents?
- ✓ Who files?
- ✓ Identifying a document as "ready to file"

## Overall Program Configuration

When developing your Intake review workflow, also consider program-wide configuration updates to support more consistent review and coding across Cases:

- Converting Case Templates to the new Case Template Format
- Setting Global Annotation Color Values and Labels
- Setting Team Level Inbox Views

## Inbox Configuration

Primafact 6 Includes built-in Inbox filters and views to make it easy to organize and identify Inbox content. You can adjust default settings, and add additional customized views.

Consider "Global" viewing preferences, as well as anticipated User Preferences, including:

- 1) Adding Subfolders
  - Subfolders act like a "place" to house specific Inbox content of your choosing, such as
    - ✓ "In Progress" review
    - ✓ Holds
    - ✓ Follow-Ups
    - ✓ Personal Reference Items

In some cases you may prefer to use other coding, and rely on filters to display more focused Inbox information.

2) Subfolder “Roll-Ups”

You can set up views to display content from the selected folder only OR content from the selected folder and subfolders (*Can be done after training*)

3) Setting up Inbox Views

- Select the fields you want to see, groupings you prefer, and necessary filters  
*e.g. Unread documents by Case; New documents with Messages*

## Annotation & Review Configuration

Because review often starts at the Inbox, we’ll want to go over some basic coding considerations (considered in greater detail by the team working with the Annotation/Coding/Chronology features.)

The Annotation Enhancements in Primafact 6 are designed to support more effective review and Case preparation, including the development of reports and Case Chronologies. Your selected customizations should **“begin with the end in mind,”** so that coding decisions are aligned with your review goals.

### A: Consider Reports

The Annotation enhancements are designed to enable reports to be instantly produced, based on annotation coding. To determine coding configuration, please determine 1-2 reports you would like to create and what they should look like.

#### Report Examples:



i) Chronologies – Pre-Accident Health

Fields included:

Event Date |   | Annotation Color Code | Document Title | Page Ref | Note | Text Excerpt

ii) Discovery Preparation

Fields included:

Annotation Color Code/Issue |   | Document Title | Page Ref | Note/Question | Text Excerpt

## B: Determine any Practice-Area Color Coding

Annotation Coding will be established based on what information you would like to include in your Reports.

### 1. **Color Coding.**

Color coding makes evidence classification highly visible “at a glance” when reviewing binder views and documents. (Color coding assignment will be considered along with setting Global Annotation Color Values and Case Templates. We recommend reserving some of the colors for future assignment.)

#### Color Coding Examples:

- Pre-Accident Health
- Post-Accident Health
- Diagnosis
- Pre-Accident Income
- Post-Accident Income
- Liability
- Key Issue
- Inconsistency

## C: Set 1-2 Annotation List Views based on Coding (e.g. health chronology)

Annotation List Views make it easy to review consolidated Annotation content configured in the order you wish to view the information. 2-3 Views are recommended as a “start” to enable reports and case prep. Sample views include pre-accident health chronology, discovery prep, income chronologies, and adversarial positions.

### **Consider:**

- Fields you want to view
- Field formatting (colour, size)
- Field positioning on lists (1,2,3)
- Sort Order, Filters and Groupings

## Configuration and Training

Consider assistance for planning and executing program configuration updates, as well as new feature training for your team.