



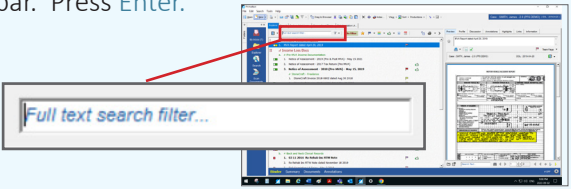
Primafact 6 Quick Start Guide

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Better Binders

New visual indicators, full-text searching & filter tools instantly identify content.

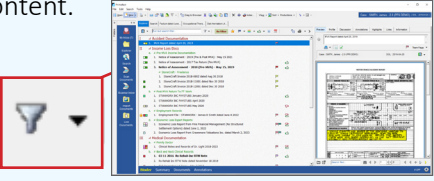
Full-Text Search: Enter search query into search bar. Press Enter.



Use drop-down filter options to find tagged content.



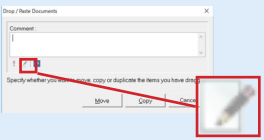
Adjust Full-Text search options: Click **Filter dropdown > Search Options**. Select **Checkboxes** to include/exclude **Document, Titles, OCR Text** and other content.



[> Watch Binder Enhancements Tutorial](#)

Document Discussions

Drag a document to a User's Inbox & add a Comment to Post. Clicking the **Review Button** assigns recipient as Reviewer.



Use **@** key or button to add recipients.

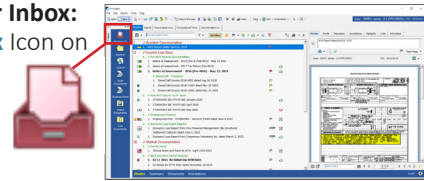
Use the Comments area on the **Discussion Tab** to post a Comment to other users.

[> Watch Document Discussions Tutorial](#)

Review-Friendly Inboxes

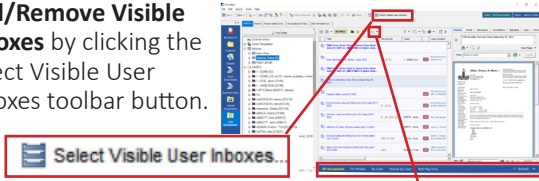
New Inboxes make it easy to review documents before filing within Case Binders.

To access your Inbox: Click **My Inbox** Icon on your shortcuts toolbar.




Notifications: number of unread items is displayed below the Inbox icon.


Add/Remove Visible Inboxes by clicking the **Select Visible User Inboxes** toolbar button.



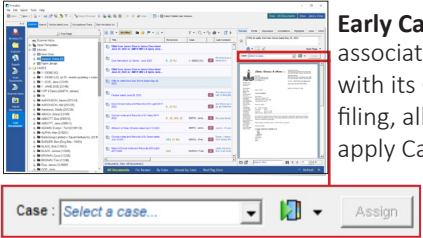
Filter and Search tools allow you to find specific content. **Unread** dropdown identifies unread and urgent items.



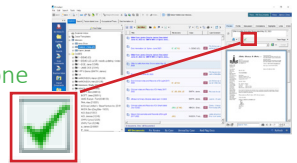
Blue Navigation Toolbar displays popular Inbox views. You can customize toolbar View selection.



Early Case Assignment associates a document with its Case before filing, allowing you to apply Case-associated coding directly from the Inbox.



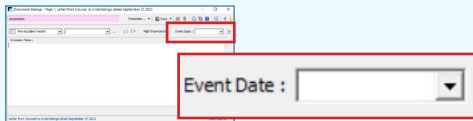
Reviewer Status:
Gold initials = For Review
Green initials = Review Done
 Click **Done** button to mark your review Complete.



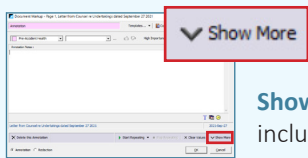
[> Watch Inbox Intro Tutorial](#)
[> Watch Intake Review Tutorial](#)

Annotation Enhancements

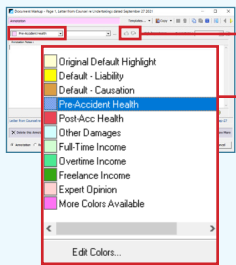
[Annotation Enhancements](#) make routine annotation coding quicker and easier.



Dedicated **Event Date** field captures event timing for chronologies. (Event Time field may be optionally added to Case Annotation forms.)

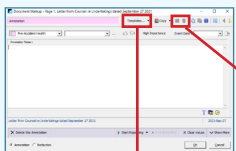


Show More button reveals Expanded form area, including page preview & dedicated OCR Text field.

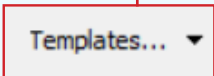


Favorability buttons   identify adversarial content.

More colors & new **color labels** support consistent coding.



Annotation Copy & Paste buttons let you copy annotation content and paste into a new annotation.

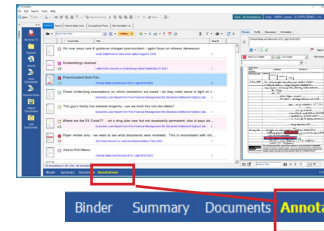


Use **Annotation Templates** to auto-populate annotation fields for speed and consistency.

[> Watch Annotation Enhancements Tutorial](#)

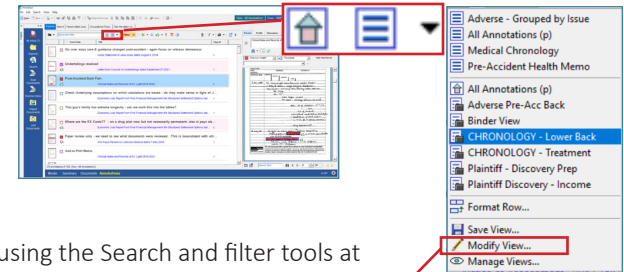
Chronologies & Reports

Instant chronologies and reports consolidate case information for more effective case understanding. Export to Word, Outlook and Excel to preserve and share.



Assemble Chronologies & Reports from the Case Annotation Screen (accessed via the bottom blue Case Navigation ribbon).

Use Saved Views to quickly assemble formatted and filtered report content. Access available Views using the **Saved Views** dropdown.



You can also filter any list using the Search and filter tools at the top of the Annotation screen to focus content on-demand.

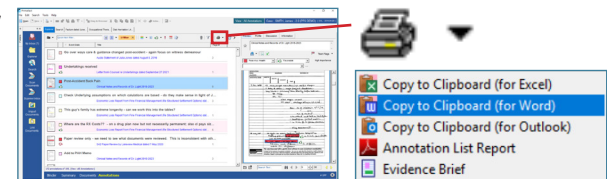
Modify View Options (near bottom of Saved Views dropdown) allow you to adjust displayed fields and row formats in Saved Views.



The **Home** Button restores the Default Annotation List View for the Case.

Export a Report / Chronology to Word: Assemble your Report using Saved Views and/or Filters, as above.

Click Reports Dropdown > Copy to Clipboard for Word.



Select Output, **Click OK**, and **Paste** to Word.

[> Watch Case Chronology Creation Tutorial](#)

E-Briefs Made Easier

Primafact's new E-Brief tools make it easier than ever to create electronic briefs suitable for upload to CaseLines and other forums.

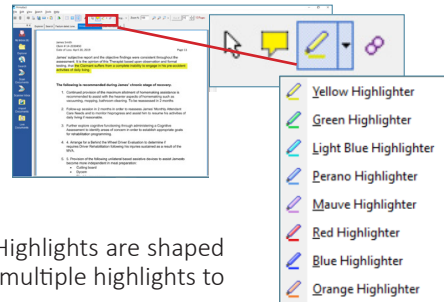
Add a Highlight

On an open document (opened in a Tab or new Window):

Click the **Highlighter** Tool

Select your preferred **color**

Draw a box around desired page content. (Highlights are shaped like a box for tidiness; you may need to add multiple highlights to capture irregularly-shaped text blocks.)



> [Watch Working with Highlights Tutorial](#)

Add a Link

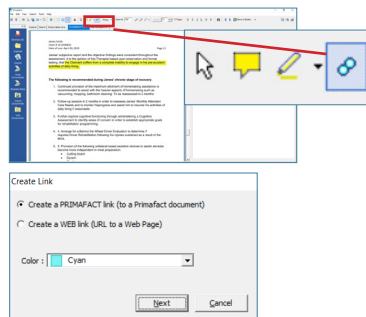
On an open document (opened in a Tab or new Window):

Click the **Link** Tool

The **Create Link** Dialog will appear

Select **Primafact Link** or Web Link

Use the **dropdown** to select a **color**



Click **Next . . .**

. . . Link to Primafact

Create Primafact Link dialog will appear.

Make sure your link destination is open to the desired page. (This can be in the Preview area or on an open document Tab or Window.) Add **Link Note** if you wish. Click **Set Link** button to create your link.

Primafact Links can be included in exported PDFs, but destination document must be included in exported bundle to preserve exported Primafact links.

. . . Link to Web Location

Create External Link dialog will appear.

Find your desired location online (you can also use **Link to Highlight** in Chrome). Add **Note** if desired. Insert link in lower dialog. Click **OK** to set link.

External Links can be included in exported PDFs.

> [Watch Working with Links Tutorial](#)

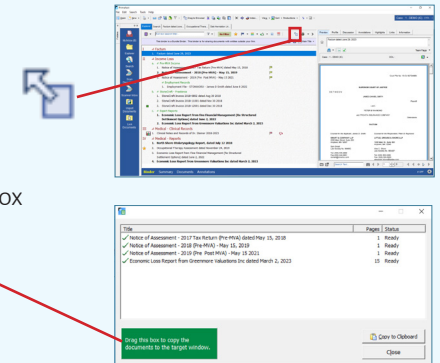
Export to Portals

The Primafact Portal Export tool speeds up exporting one or more individual Primafact documents, and preserves the source Binder's document order when exporting.

Select your document(s)

Click the Export button

When the **"Drag this Box..."** square Turns green, **click and drag** the green box to your export destination.



> [Watch Portal Uploads Tutorial](#)