Working with
Primafact **6**

New Feature User Guide

About Primafact 6

Primafact 6 takes case development to the next level. We have equipped Primafact for more efficient document review and case preparation.

Starting with your Inbox, Primafact 6 adds tools to sort, filter, code and track your new materials, making it easier to review and instruct and preserve details for future review. Enhanced coding tools capture key case information, to automating the intensive task of memo building.

Primafact 6 enhances efficiency at every stage of review, connecting meaningful analysis to source materials for better preparation and case understanding throughout the life of the case.

Video Overview

Click here to view our 10-minute overview of the new features available in Primafact 6.

We also offer a number of video tutorials on the individual features to help you get started.
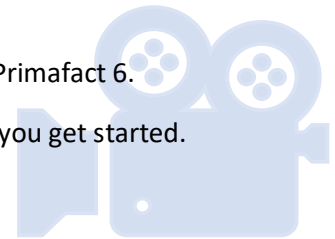
New in Primafact 6

Primafact 6 includes a number of new features, as well as enhancements to features available in Primafact 5. These include:

More Powerful Templates	Configure your Cases more efficiently than ever with more feature-rich Case Templates. Case Templates now pack the coding standards and preferred views designed for your Case type. Open Cases with views & coding already built-in, or easily update existing cases to match new Coding standards and report-friendly views.
Primafact Inbox	This is a special user-level folder designed to facilitate document intake and review, with search, filter and messaging capability via the new Discussions feature.
Review Workflows	• New review workflow tools enable review tracking to more efficiently manage and monitor document review and associated activities. • **Early Case Assignment** enables documents to be associated with their assigned Case prior to filing.
Document Discussions	This new feature allows messages to be exchanged within user Inboxes, with real-time notification.
Binder Enhancements	Visual coding enhancements, search and filter tools directly within the binder, and enhanced previews make identifying materials in your binder more efficient than ever.

Document Preview Enhancements	More information available on the Document Preview, with new Tabs for convenient annotation review and document discussion within Binders and Inboxes.
Easily build Chronologies, Outlines and Reports	• Instantly assemble chronologies and outlines from Primafact into Word and Excel • Link back directly to Primafact source content • Export URL link to Word memos
Annotation Enhancements	• Chronology support with Event Date + Time tracking • 12 more annotation colours + custom labels for uniform coding • Dedicated favorability coding • Dedicated Text Excerpt field • Annotation Repeats, Templates & automation • Batch updating capability • Better annotation view and search on documents, previews and lists
List View Enhancements	• Control default views, create and access multiple alternate views that can be displayed in a single click • Pop-Out List feature enables list views to be displayed alongside other Primafact windows
Copy Documents to Browsers	Drag & Drop documents to Browsers and other locations outside Primafact more efficiently
E-Briefs	Assemble electronic briefs, including CaseLines filings, efficiently with highlighting, hyperlinks, Document Title Aliases, and PDF Publish tools.

Create and Update Cases With More Powerful Templates

Primafact 6 makes applying unified Case Standards more efficient than ever with coding settings and views built right into the Template.

> ▶ Watch the video here: *Using Case Templates*

Create New Cases

When adding a new Case to Primafact, you will now see a new **Create New Case** dialog:

Now you can enter your New Case name before it's created, and select the Template you want to use for your Case using the dropdown beside the **Select a template** field.

By default, all Template settings, including coding settings and views, will be included in your new Case.

Optional: to selectively apply Template Settings click the Show More button and choose your settings.

Click **Create Case** to save your new Case.

*Note: You can also copy the structure and settings of a selected Case, in addition to copying from Templates, by un-selecting the Case Templates Only checkbox. This allows you to use any Primafact Case as the basis of your new Case. *

Updating Existing Cases to Match Template Settings

If you are updating to Primafact 6 with an existing caseload, it's easy to update existing cases to match your Templated Coding Standards and Case Views. You can even apply coding settings from another Case using this tool.

Apply Settings from a Template to an Existing Case

1. Start by opening a binder on the Case you want to update.

2. Click the Geary on the far-right of your blue binder ribbon.
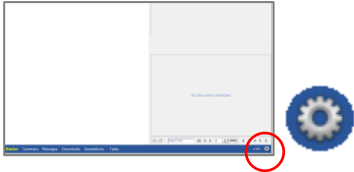
3. Click Setup Case From Template from the dropdown menu.

4. The Setup Case Window will open.

5. Choose the template you wish to copy.
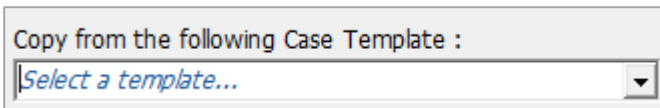
6. Click the Chevron beside any areas you wish to copy.
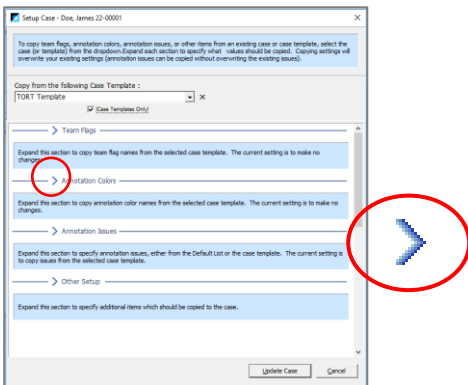
7. Select the Copy Case Template button for template options you wish to copy to your Case. Select Keep Current to retain your Case's current settings for that setting. (By default that setting will make no changes to a selected setting unless you select Copy Case Template.)

8. When you have completed your selections, click Update Case to update.

9. To select specific areas to update, expand the Other Setup menu item using the blue chevron to expand.

Add Date of Loss to your Case

Adding the Date of Loss to your Case Summary makes it easy to filter Events by Pre-DOL and Post-DOL using Primafact filter tools. Also, the DOL is displayed on all Case Binders and Case Views, for convenient reference.

To add the Date of Loss to your Case Summary:

1. Navigate to any Binder in your Case

2. Select Summary on the blue tab bar
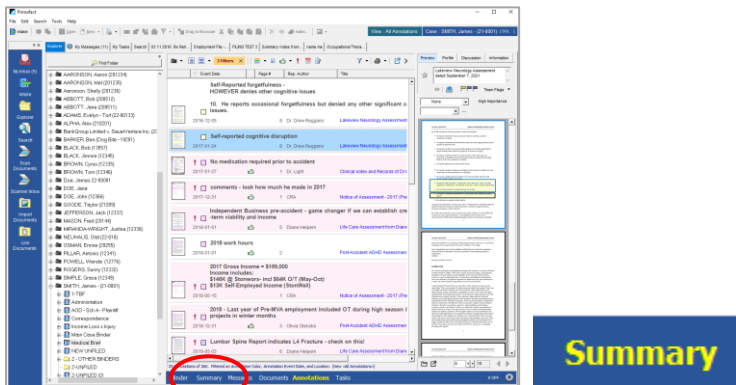
3. The Summary Screen will open.

4. **Click** the Edit button to add the Date of Loss.
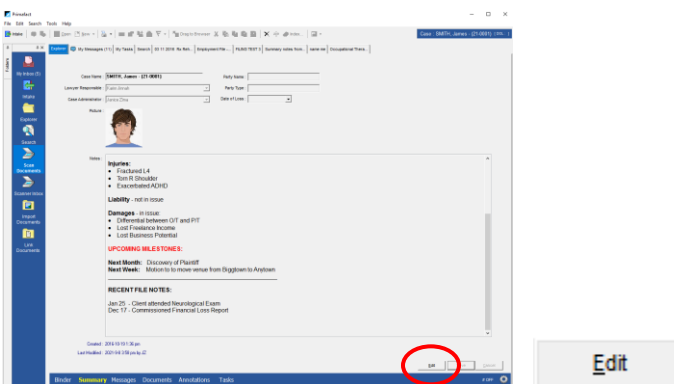
5. Enter the Date of Loss in the Date of Loss field
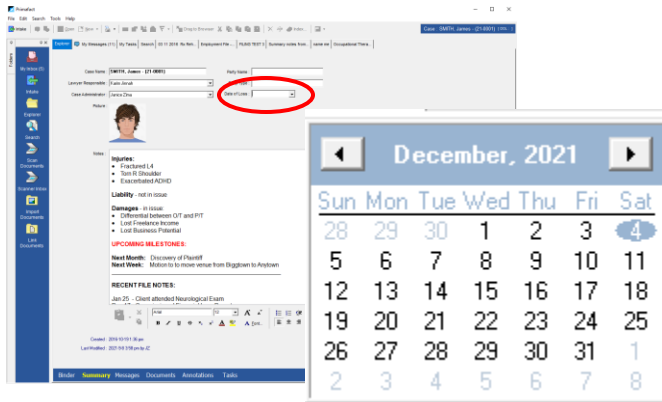
6. Click Save to preserve your new setting.

The Date of Loss will now appear at the top right of your Case views, and will be available for use in Date of Loss filters.
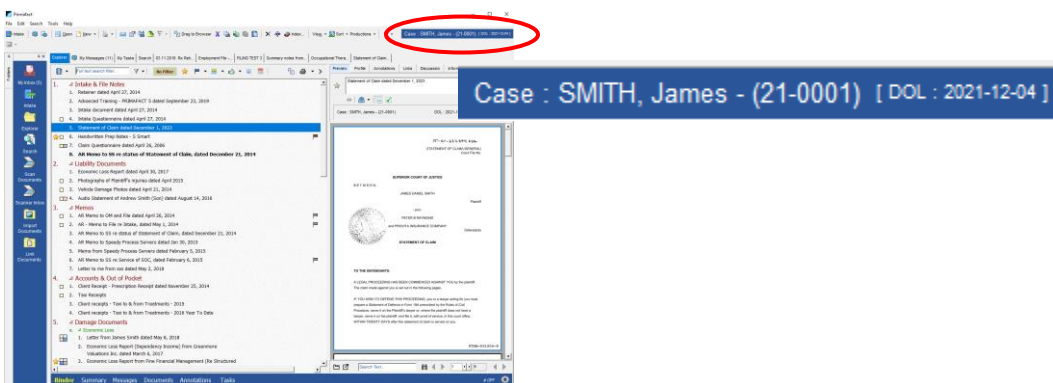
New Coding Capabilities

Primafact 6 includes additional coding capabilities at the both the document level and for annotations.

New Document-Level Coding

You can now add team flags to documents to designate document-level attributes. Team Flag Labels can be customized system-wide, or by Case.

As an example, a document with a Red Flag could mean "Offer Attached." A document with a green flag could mean "Outbound Correspondence." Alternatively, you could use flags to designate attributes like "Served" or "Ready to File."

The flag makes it easy to identify content of a particular document, so you can filter for those attributes on a search.

*See **Customizing Team Flags*** below for details on how to set up customized Team Flag Labels.

Annotation Coding Enhancements

Primafact 6 includes a number of coding enhancements designed to better track key Case Issues and dates, with the goal of making comprehensive reports and chronologies available for efficient Case preparation. For details on updates to the Annotation Form, see Annotation Form Updates below.

Binder Enhancements

 Watch the video here: *Using Binder Viewing Enhancements*

Binder Search and Filter

You can now complete full-text document searches directly from your Primafact Binders, making it easier than ever to locate specific information when reviewing from a Binder. You can combine filters with searches for very targeted document identification within your binders.

Search Bar

The search bar is located at the top of the Binder toolbar.
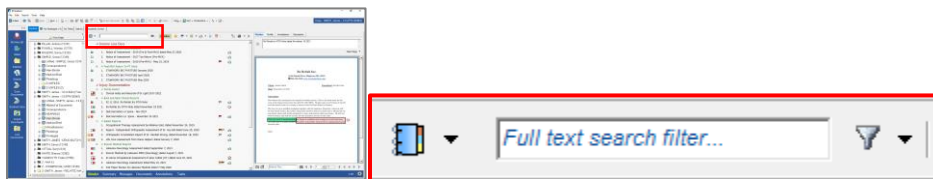
By default, Primafact 6 is set to perform full-text searches, including document titles, page text, annotations and profile fields. To perform a search, click on the search area and type your search query. Click the **Enter** key to perform your search. To adjust search settings, see ***Changing the Search Filter Options,*** *below*.

If your search bar is set to perform Full-Text searches, you can use wildcards (***** and **?** characters) to replace characters in your search.

Changing the Search Filter Options

The Binder search bar can be set to perform a ***Quick Search,*** which searches document titles, or ***Full-Text Search,*** which can include content in Titles, Page Text, Annotations and Profile Fields, depending on your selected settings.

1. To adjust your settings, click the filter dropdown to the right of the search bar:
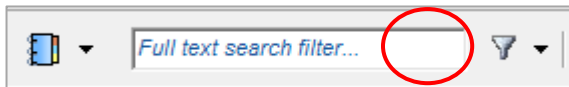
2. Click **Search Options.**

3. The Binder Text Filter Options dialog will open:
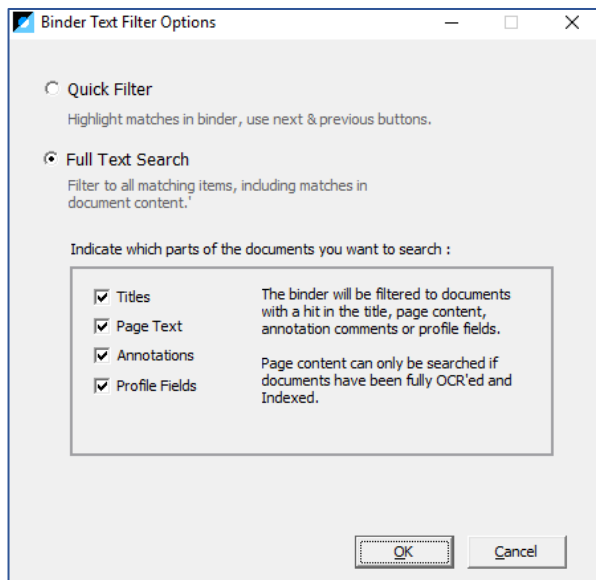
4. Select the Quick Filter button to perform Quick Searches. Select the Full Text Search Button to search for text content within your documents.

5. Selecting or de-selecting the Titles, Page Text, Annotations, and Profile Fields checkboxes will adjust the scope of your Full-Text Search.

6. Click OK to preserve your selection.

Using Filters

You can use filters on their own, or combine with text filtering for focused document identification. You can also apply more than one filter at a time for more refined results.
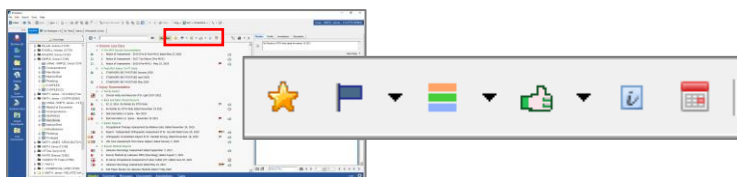
Filters are located on the binder toolbar to the right of the binder search bar. Available filters are:

 Key Document

 Team Flags (Dropdown allows you to select multiple flag colors)

 Annotation Colors (Dropdown allows you to select multiple annotation colors

 Annotation Favorability (Choose Favorable, Adverse, or both using the dropdown)

 Annotation Issue

 Document Date (Allows you to specify document date or date range)

Reviewing Filters

1. To review which filters have been applied, click the yellow Filters button:
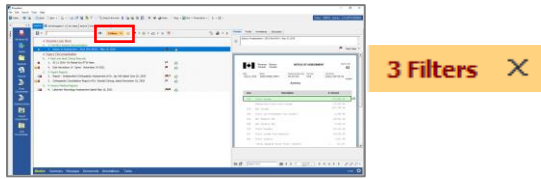
2. The Current Binder Filters window will open:

3. Click OK or Cancel to close. You can also selectively clear filters using this window.

Clearing Filters

1. To clear an individual filter, click on the selected item to de-select. For filter options with a dropdown, click the dropdown and select Clear Filter.

   You can also click the **X** on the **Clear Filter** button to clear all applied filters.

Selectively Clear Filters

1. To selectively clear filters, click on the yellow Filters button. The Current Binder Filters window will open.
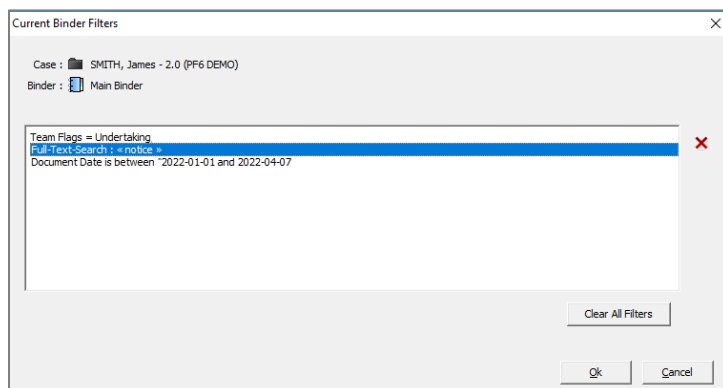
2. Select the filter you want to remove and click the red X button.

3. Repeat as desired.

4. When finished click OK.

Document Preview Enhancements

Document Preview Tabs

We have updated the Preview area to display more information without needing to open the document. There are now four tabs:

- *Preview Tab* – Displays selected document
- *Profile Tab* – Displays associated document profile information
- *Annotation Tab* – Displays document information on a searchable, filterable list
- *Links Tab* – Shows hyperlinks added to a document, notes and link address
- *Discussion* – Displays document discussion history
- *Information* – shows additional document-level information, including document locations in Primafact, OCR status, review status and technical information.

Each of the *Preview*, *Profile, Annotation* and **Links** Tabs display the document **Title**, **Key Document** coding, **Reviewer** and **Team Flag** information. You can name/rename the document, apply Key Document coding, apply Review status and apply Team Flags using any of these three tabs.
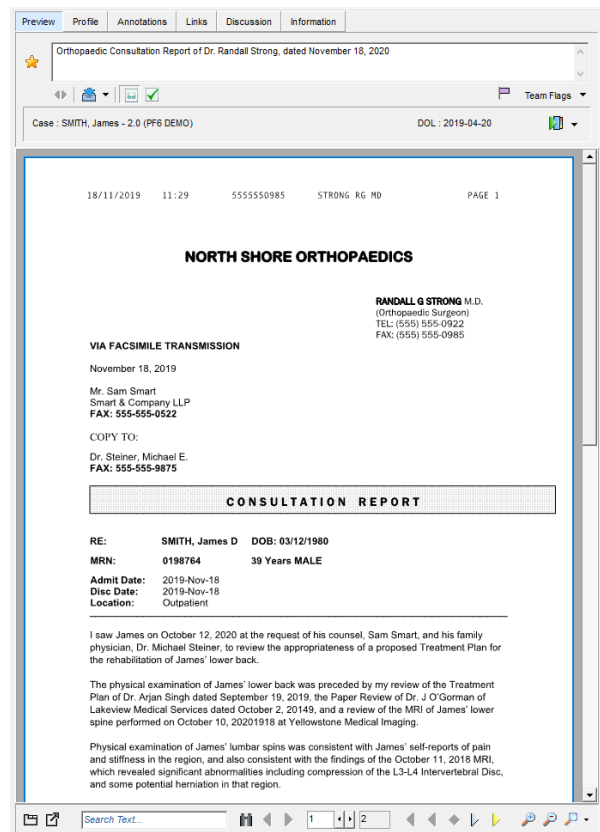
Document Viewing

Open Document Enhancements

It's now easier to identify document context by quickly locating the document within its binder. Simply click the *Show in Binder* button on the document toolbar to be taken to the document's location in the binder view.
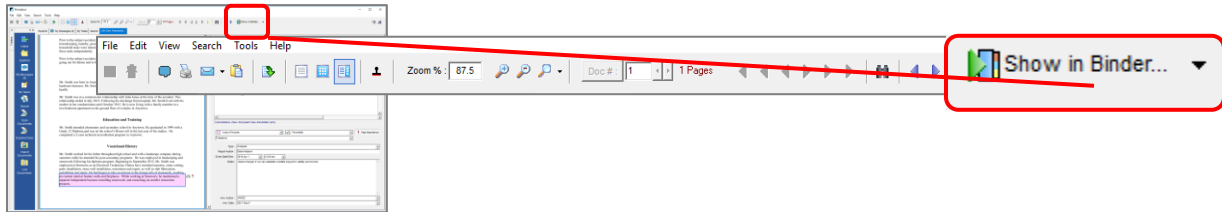
If a document is copied to multiple locations, you can choose an alternate location by clicking the **dropdown** arrow beside the *Show in Binder* button and selecting the desired binder location.

The Inbox

Recognizing that document review often starts with the Inbox, we have created a dedicated Inbox feature with capabilities that include the ability to search and filter documents in your Inbox, set preferred views, and manage inbox discussions for quick and convenient team document communications. You can create your own subfolders to organize inbox materials as desired.

You can access your Inbox by clicking on the *My Inbox* Icon at the top of the Shortcuts bar:
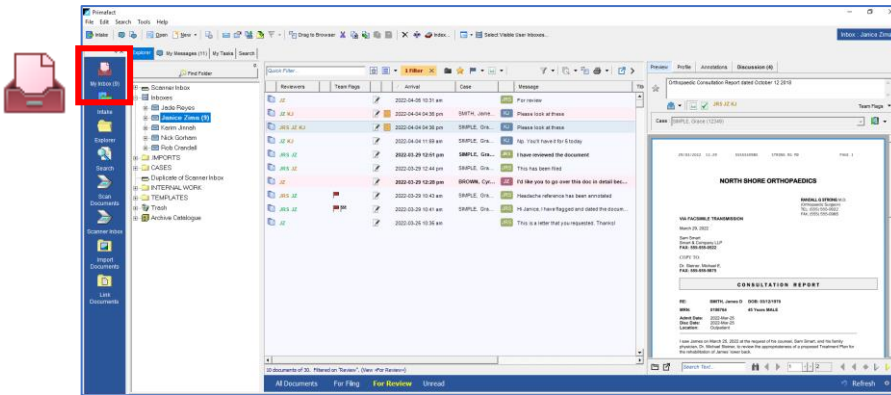
Viewing your Inbox

Main Inbox

The top level of your Inbox (Main Inbox) is designed to show you anything new that has been added to your Inbox.

You can decide if you want your Main Inbox to also show the contents of any subfolders, or just the contents of the Main Inbox folder. By default, Primafact shows the contents of the selected folder only, meaning no content filed in subfolders will be shown.

New Arrivals Indicator

When new documents or messages arrive in your Inbox, your Inbox Icon will display the number of unread items appearing in your Inbox:
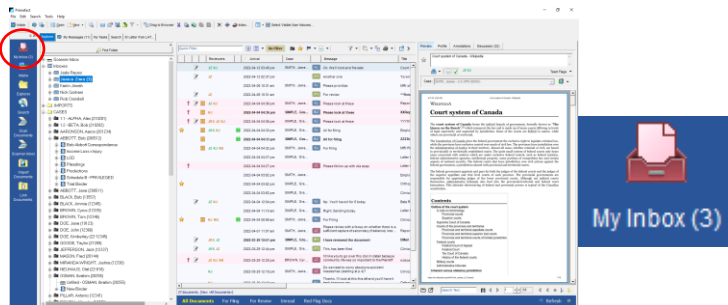
Note: If your shortcuts toolbar is hidden or disabled, your inbox notifications appear at the bottom-left corner of Primafact.
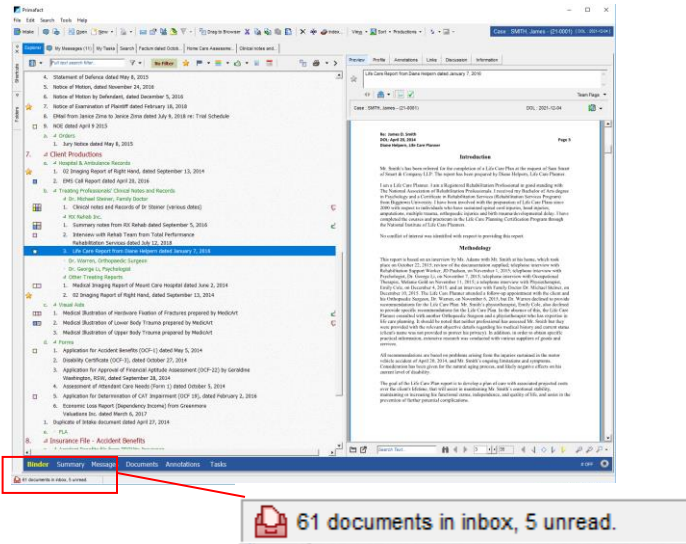
Identifying Inbox Folders with New Items

Individual folders with new items will also display a bolded title along with the number of new items:
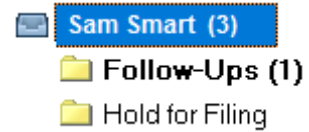
We recommend you set aside time to check your Inbox regularly for new arrivals.

NOTE - You can mark items "Read" or "Unread" by right-clicking on the item and selecting Mark Read/Mark Unread.

Refresh button

We recommend you click your Refresh button from time-to-time to confirm you are viewing the most recent content in your Inbox.
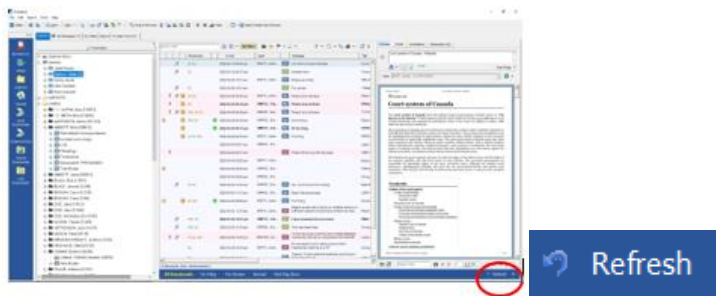
Searching your Inbox

You can search and filter content in your Inbox. As with the binders, you can set your Inbox to complete Full-Text Searches, or Quick Filter searches.

For guidance on how to use the filters, see *Using Filters* in Binders, above. Note the available filters will be slightly different in the Inbox.

Filtering Inbox Content

You can filter your Inbox as needed in the moment, and even preserve those filters in saved Views for quick future access.

Primafact 6 has two built-in filters: **For Review** and **For Filing**. *When you are in your own Inbox*, the **For Review** filter identifies content marked for your review, and not marked done. The **For Filing** filter identifies documents marked for filing *by you*.

Adding Documents to your Inbox

Documents may be added to Primafact Inboxes the same way you add documents to any location in Primafact. This includes Dragging & Dropping, and Scanning to the Inbox if you have a compatible scanning configuration.

You can also right-click on any document in Primafact and click the menu option, then select the recipient(s) who will receive the document in their Inbox
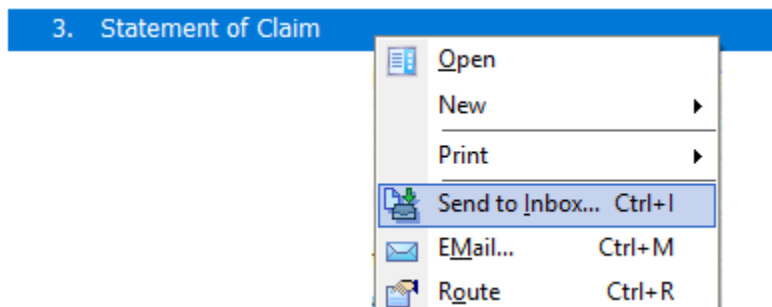
See Sending Documents to Other Users' Inboxes *below* for guidance on sending documents to other users' Inboxes.

Adjusting Your Inbox Settings: Setting Up Your Inbox

Note: For instructions on refining your Intox List View, see Customizing List Views, below.

Customizing your Tab Bar

You can change the items on your Tab bar to provide quick access to the views that are most important to you.

To customize your Tab Bar:

1. Click on the gear icon at the far right of the blue Tab bar:

2. The Tab Bar Options window will open.
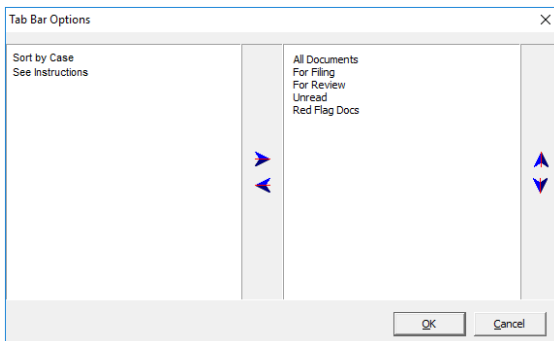
3. Select the Views you wish to add or remove from the Tab bar using the arrows.

4. Position the View order using the arrows.

5. Click OK to save your changes.

Change Inbox View – Folder Content

Inbox View settings can be set at the User Level to allow you to see your preferred fields and formatting when you review your Inbox. Changes to your own view settings will not impact other users.

Adjusting Folder Content Displayed in Main Inbox Folder

To change what Inbox Folder content (Inbox content only or Inbox + subfolder content) you see in the Main Inbox:

1. Click the More View Options Dropdown button
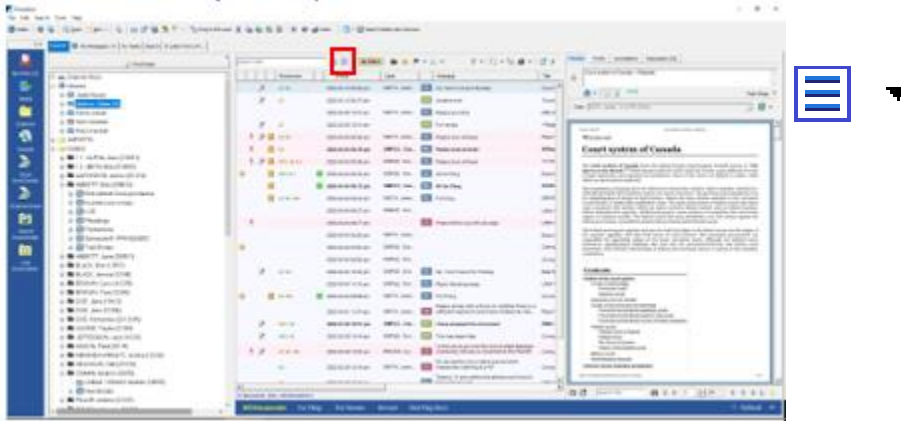
2. Select Modify View.

3. The *Modify Inbox Documents View* window will open.

4. Change Show Documents In: selection to "Selected folder and subfolders."
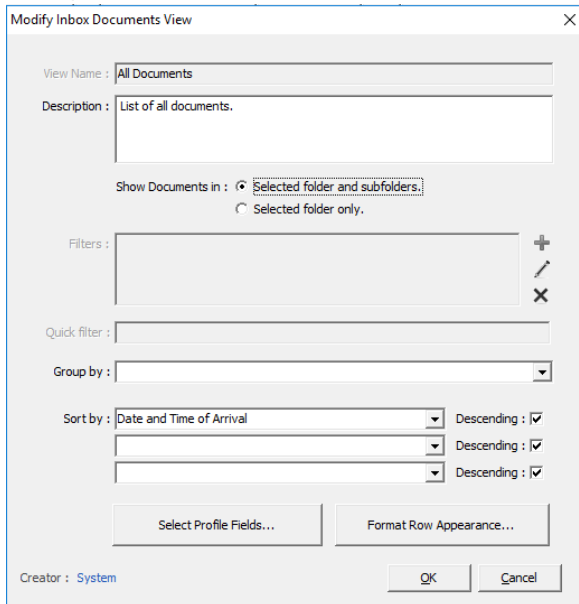
5. Click OK to preserve your changes.

6.

NOTE: *Primafact's Default "Show Documents" setting is to show documents in Selected Folder Only.*

You may make additional changes to your Inbox view using this window as described elsewhere in this Guide.

Updating your Inbox View

You can change your field display in your Inbox

To do this:

1. Click the View button and select Format Row.
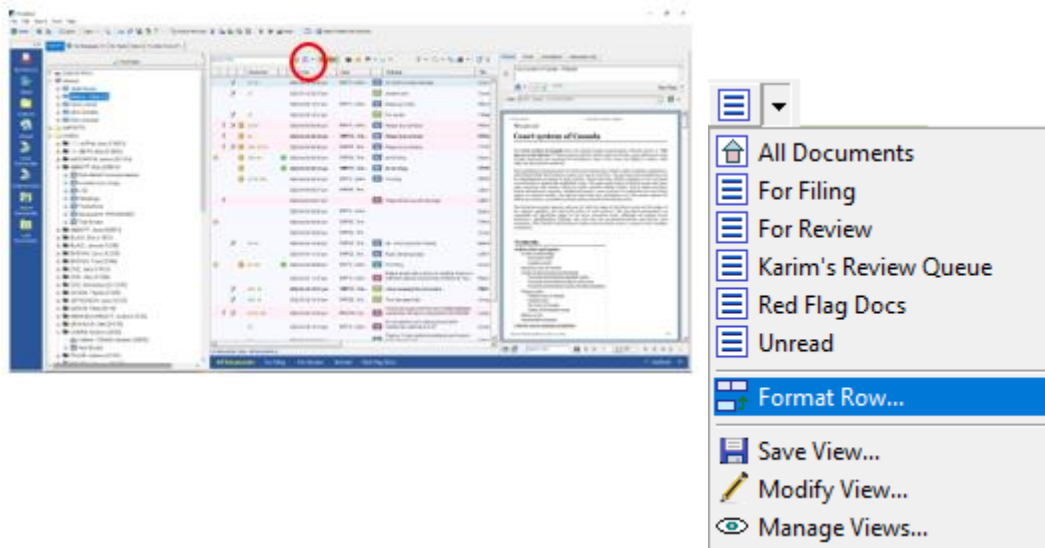
2. The Format Row Appearance window will open:
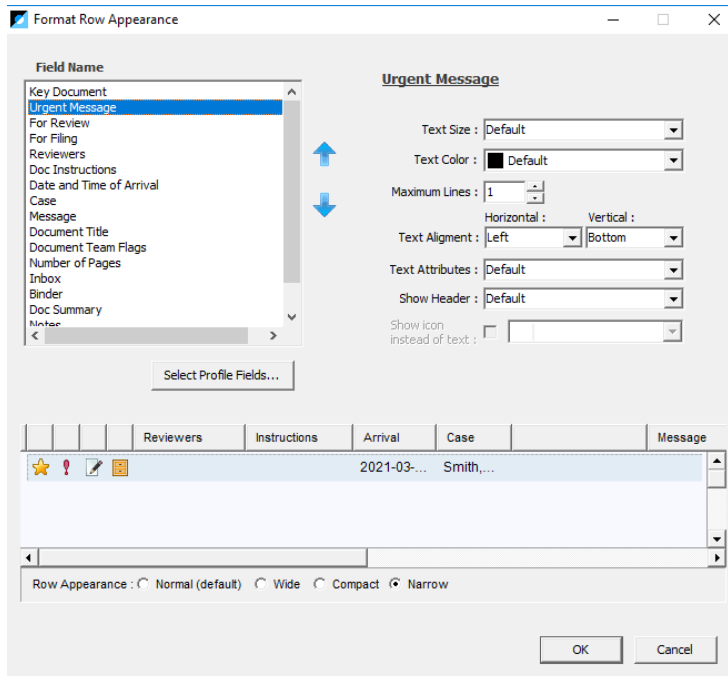
3. Select Profile Fields by clicking the Select Profile Fields button. Use the arrows to add or remove fields from your display.

4. Click **OK** to preserve your changes.

5. To position your fields, use the up and down buttons (if you do not see both, they will appear as you select an item further down the list.

6. Formatting for the selected field appears at the right.

Formatting List Fields

1. You can change text attributes (color and size) for the selected field on the right hand side of the *Format Row Appearance* window.

2. To conserve space on lists, text fields, such as Notes, offer the option of showing an information icon instead of text:
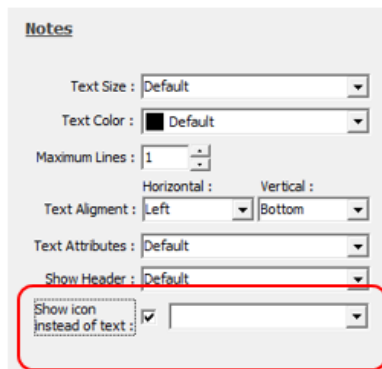
3. Select your chosen icon using the dropdown.
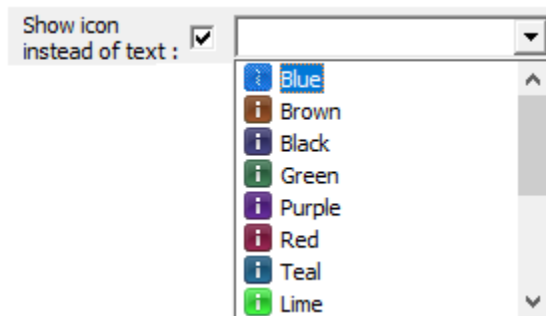
4. Click **OK**.

5. Add any filters, if desired.

Saving your View for Future Use

To save your view for use as a "Saved View":

1. Click the **View** button and select **Save View**.
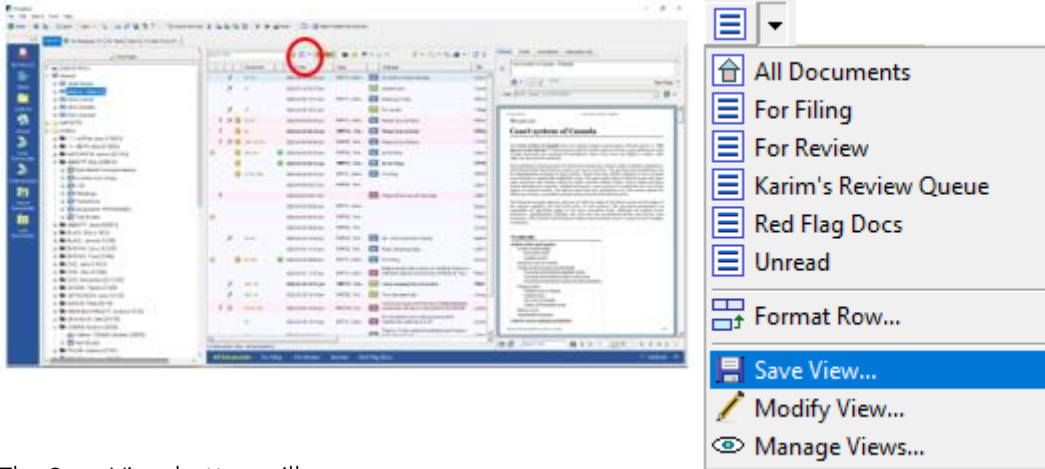
2. The Save View button will appear.
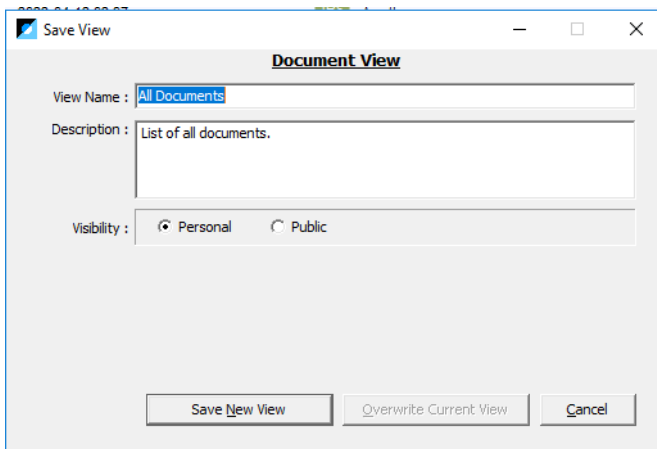
3. **Name** your view. You can set this view to **Personal** visibility (meaning only you will see this view), or **Public** visibility, which makes this view available to other users.

4. **Save** your view when complete.

See Customizing List Views below for more details on formatting Saved List Views.

NOTE – *Be careful if creating a new view using an existing view as you have the option of overwriting the current view with the new settings.*

Document Review Workflows: Reviewing Documents within your Inbox

Primafact Inboxes are designed to make it easy to review your documents right within your Inbox. In addition to search and filter features, the Primafact Inbox has a number of review supports, including "For Review" marking, a dedicated Notes field and a team Discussion tool.

Early Case Assignment - Assigning Documents to a Case before Filing

The *Early Case Assignment* tool lets you assign documents to a Case before filing. This allows you to use Case coding tools while a document is awaiting review within Inbox, allowing users to effectively complete document reviews and coding as soon as a document is received.

To assign your document to a Case:

1. Select the Document(s) in the Inbox.

2. Select any of the first four tabs in the preview Window.
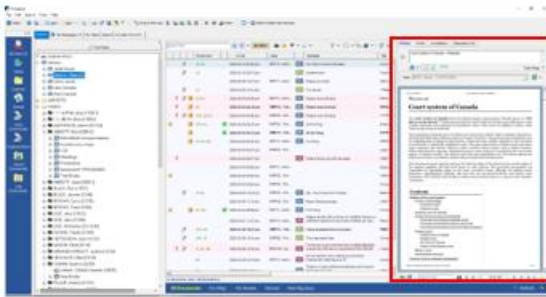
3. Start typing part of the Case Name in the Case area to display matching options.
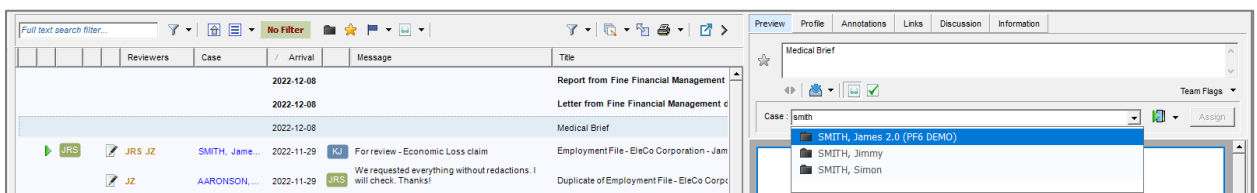
4. Select the desired Case.

5. Click the Assign button to assign to the Case.

6. Once assigned, the *Case* field will turn Grey.
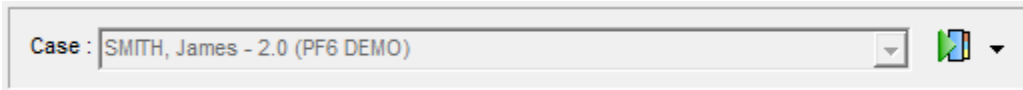
7. Clicking the dropdown button beside the binder icon will display all locations where the document can be accessed in Primafact.   Clicking any of the listed locations will take you to that binder or folder in Primafact. (This is a single document; all locations contain **copies** of that document.)
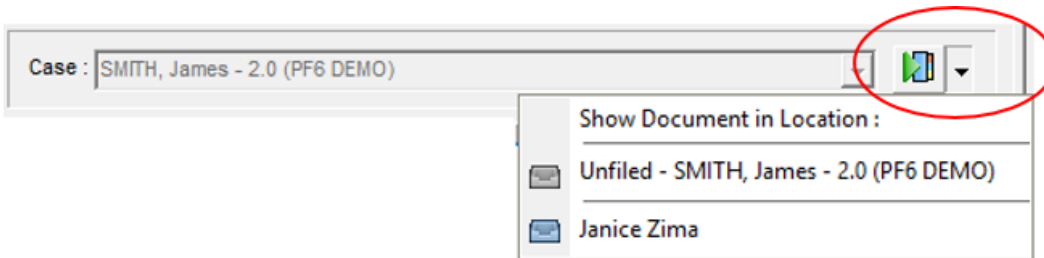
8. Now you can apply any Case coding to your document.

NOTE – *When the document is filed in a Case Binder in Primafact, the document copy will be removed from the* **Unfiled** *folder in that Case.*

Marking a Document "For Review"

You can mark your own documents "for Review" or mark for review by another User when sending them a document.

Review Indicator

Documents marked for review will have the reviewers' initials displayed on the first four **Preview Tabs** when viewing the document Preview. Reviewers' initials appear on the Profile Tab when viewing the Open document in the Normal View.
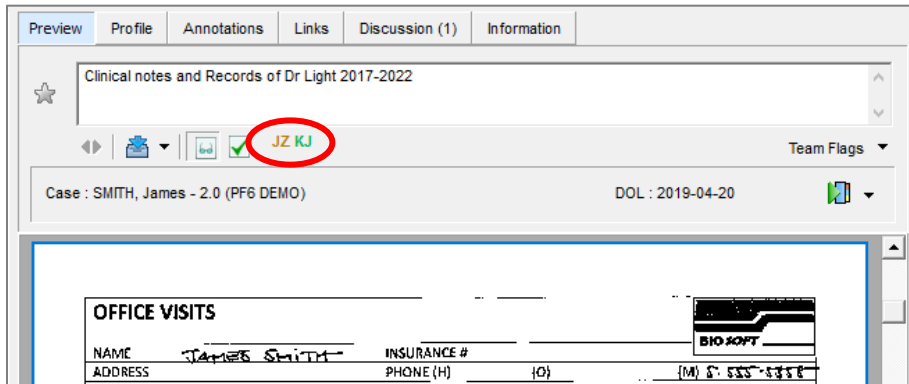
- Initials in Brown (**JZ** in this image) indicate a document is marked "For Review" for that user, but not marked done.
- Initials in Green (**KJ** in the above image) indicate a document has been marked as reviewed by that user.

Marking a Document for Your Own Review

To indicate that a document requires *your own review*, click the dropdown arrow beside the **Inbox Icon** on the Preview Tab (Profile Tab on an Open Document).

Click **Mark for Review.**
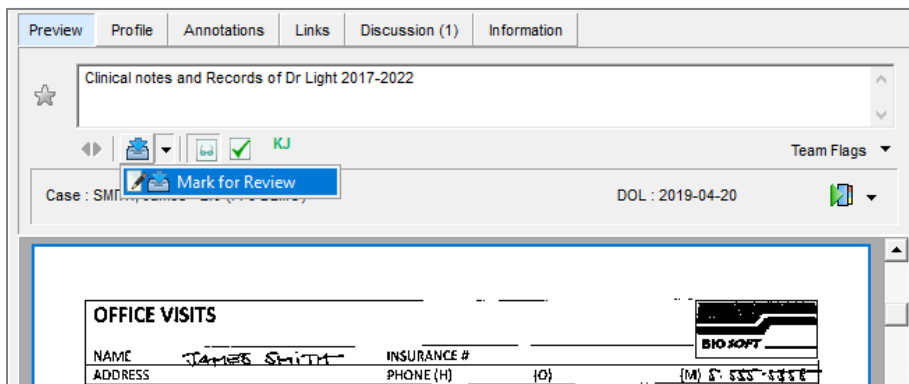
Marking a Document for another User's Review

When sending a document to another User, select the "For Review" button on the **Send Document(s)** window. The document will be marked for that user's review when sent. To mark a document for multiple users' review at a time – *see Sending Documents to Other Users' Inboxes*.

Marking a Review Done

To mark your review **Done**, click the checkmark button [✓] to the right of the Inbox icon. Your brown initials will turn green, and the document will no longer be marked "For Review."
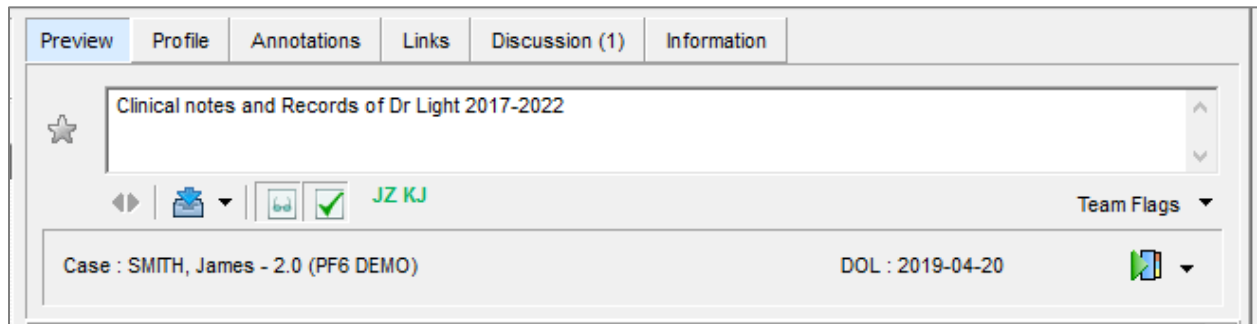
NOTE – Clicking the checkmark button will mark the item as "done" by you, and add your initials in green, even if you did not mark the document "for review" before clicking the checkbox.

Changing a "Done" review back to "For Review"

To return your reviewed document to "For Review" status, click the checkmark button [✓] to the right of the Inbox icon. Your initials will be changed to Brown, and your document will be returned to the "For Review" list.

Unmarking a Document For Review

To unmark a document for your review, click the click the dropdown arrow beside the **Inbox Icon** on the Preview Tab (Profile Tab on an Open Document).

Click the **Unmark for Review** option. Your initials will be cleared. (You will need to do this twice if your initials are displayed in green.)
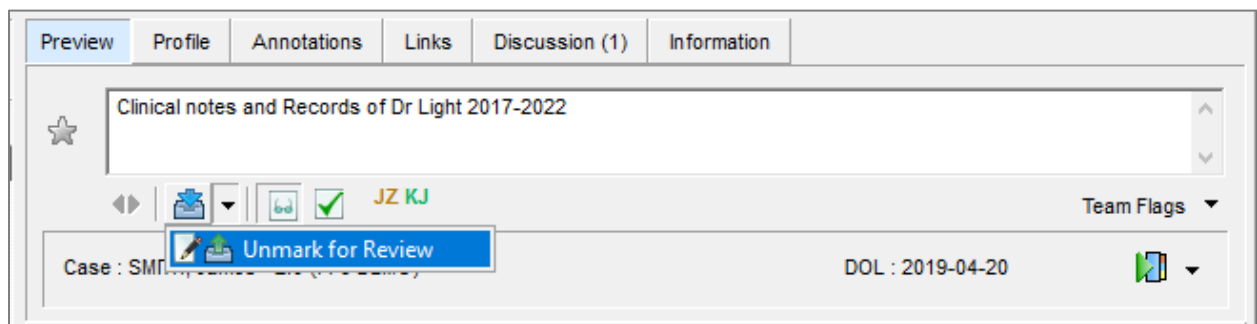
Inbox Filter: For Review

You can quickly filter to your Inbox items marked "For Review" by you (and not marked done) by clicking the "For Review" Button on the blue **Tab Bar** located at the at the bottom of the Inbox.
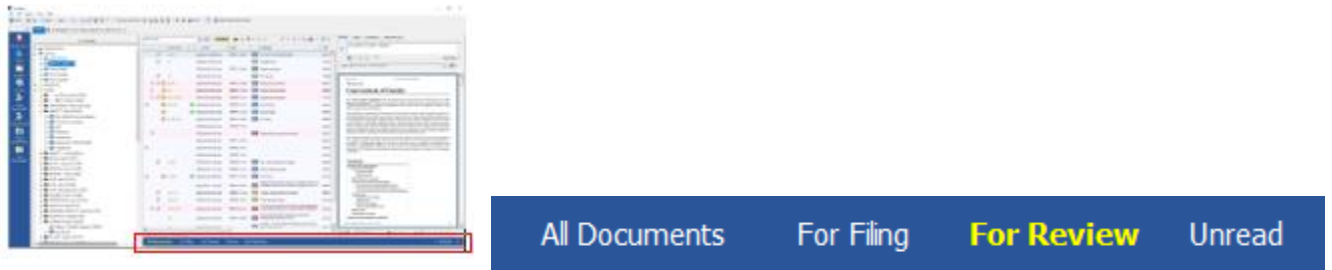
See *Marking a Document "For Review"* *for more details on this feature.*

Sending Documents to Other Users' Inboxes

You can easily move documents to other Users' Inboxes, or send **copies** to other users for filing or review while the document remains in your Inbox, allowing concurrent review for multiple users.

To Send Documents to a Single User

To send to a single user, you can drag and drop the selected document(s) from your Inbox into the other user's Inbox. A dialog will appear, giving you the option of moving or copying the document. You can add a message, Mark "**Urgent**," and/or "**For Review**."
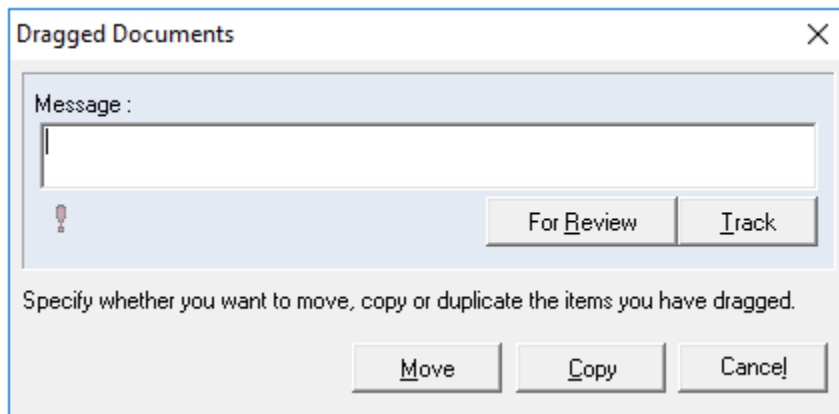
To send to multiple recipients at the same time:

1. Select your document(s)

2. Right-click after selecting your document(s) and select Send to Inbox.
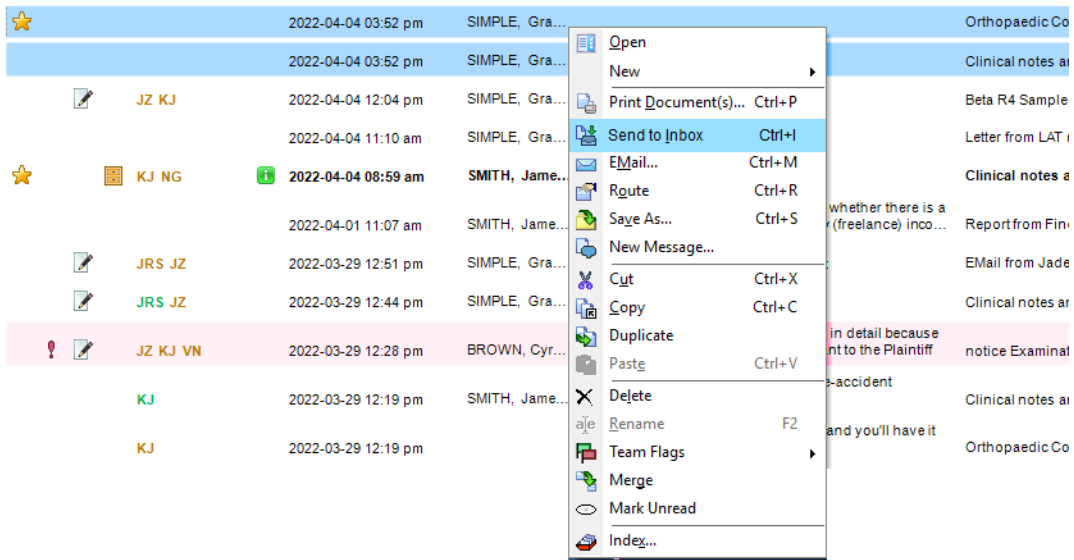
3. The Send Document(s) to Inbox(es) window will appear.
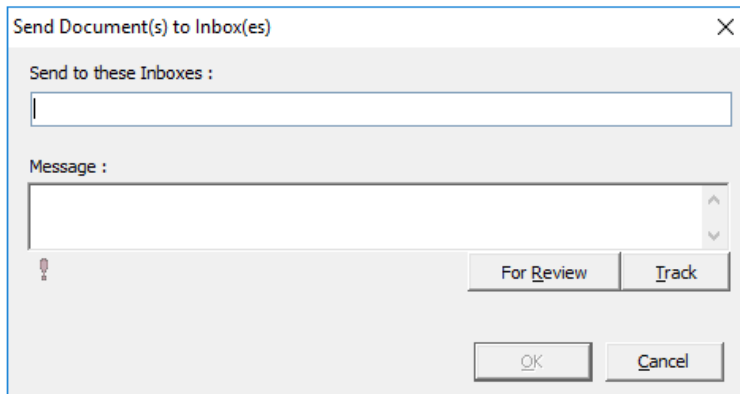
4. Type the recipient initials in the top field (as you type matches will appear. Click on the item on the menu or **Enter** to select.
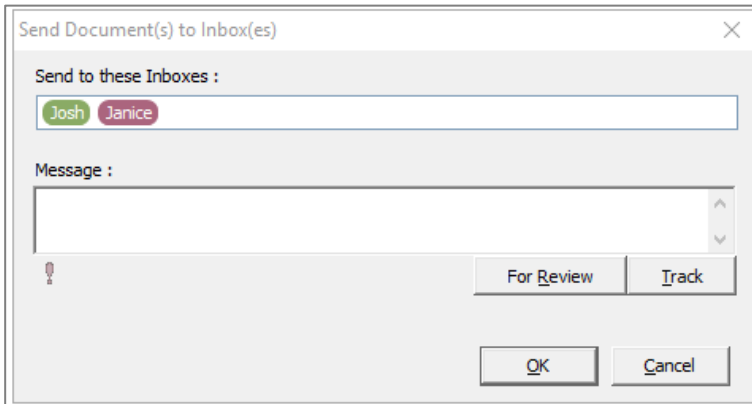
5. You may add a message if you wish. (Messages appear on the document **Discussions** tab)

6. You may also mark documents Urgent or For Review.

7. *NOTE – Documents sent using the Send to Inbox menu item stay in your Inbox after sending. If you wish to delete from your Inbox you will need to delete after sending to other users. They remain selected after sending so are easy to identify.*

Sending A Message (Document Discussions)

You can add messages to documents as you send them to other users. These are called Document Discussions and appear on the Discussions tab on a document.

Messages can be added as you send a document in the Messages area of the **Send Document(s)** window, or sent from the **Discussions Tab** of the selected document.
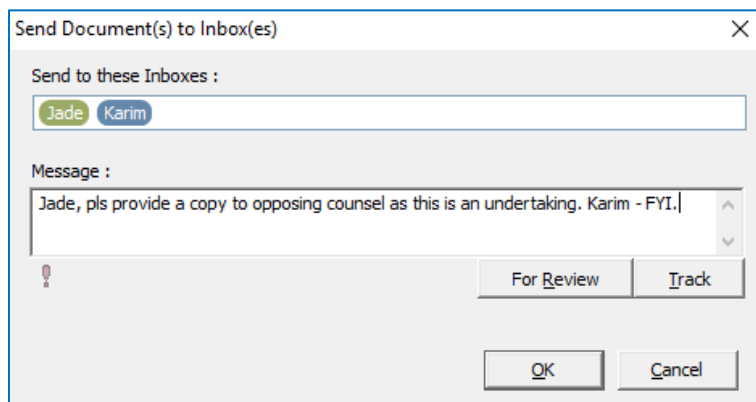
Directing recipient to a specific page

You can direct your recipient to a specific page of your document by right-clicking on the page in the Preview area, **right-clicking** and selecting "**Send to Inbox"** from that page. The document will open on that page in the recipient's Inbox.

Document Discussions Tab

All messages on a document appear on the Document Discussions Tab. You can send a message to another user by entering their initials in the **To** area near the bottom of the Tab.
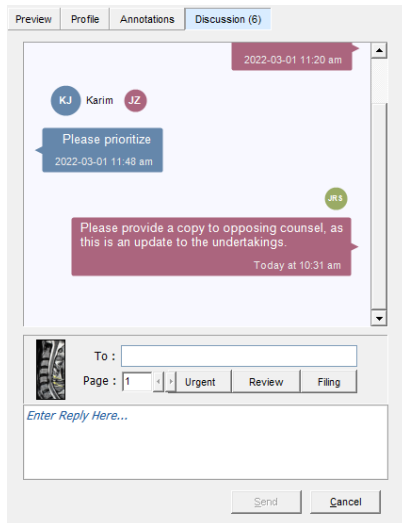
Replying to a Selected Message

You can reply to a specific message by clicking on that message, and your message will be directed to that user.

You can direct recipients to a specific page by entering the destination page in the **Page** area before hitting **Send**.

Adding Persistent Notes and Instructions

You can add a more persistent notes and instructions by entering them in the **Notes** area on the profile field, or other field that your team has designated for Instructions.

You can set this field to appear on your Inbox view, either as a text field, or as an **[i]** icon, which, when displayed, indicates content has been added to that field.

See *Updating Your Inbox View* for details on how to make Notes visible on your Inbox List.

Pop-Out Inbox

You can Pop Out your Inbox screen to view it alongside other Primafact windows. This is designed to make activities like filing easier. You can pop-out any Inbox folder, and other list views as well.

To Pop Out your Inbox, select the Pop-Out button ⬈ on at the far right of the main toolbar:
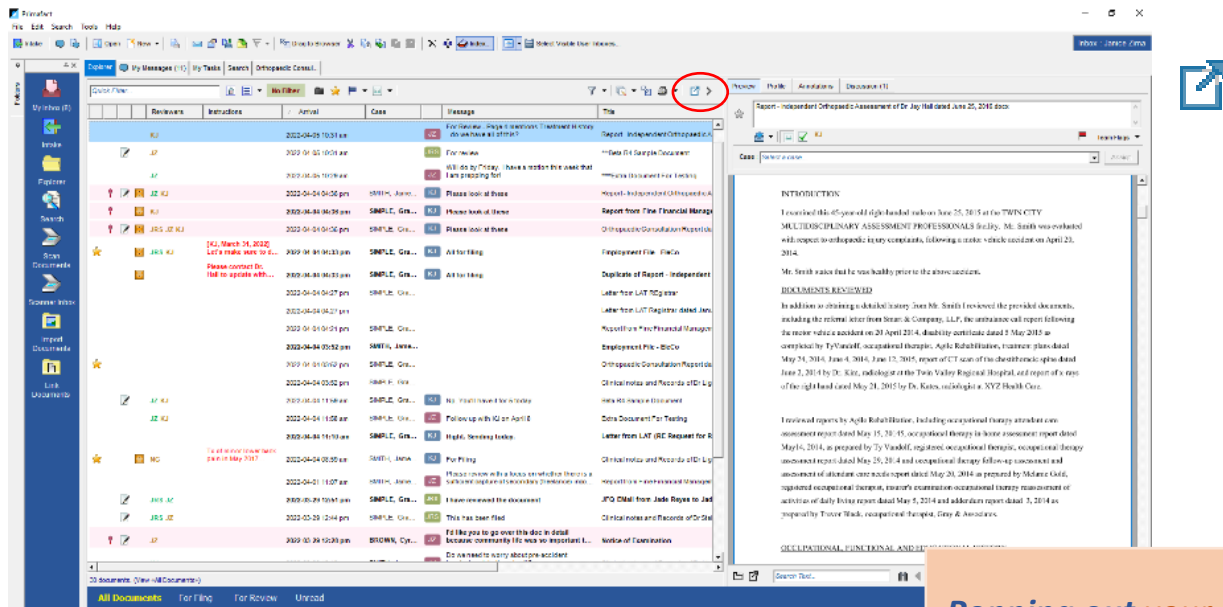
Popping out your Inbox screen into a new window makes filing easier, since you can view both locations side-by-side.

Viewing Other Users' Inboxes

You can view documents in other users' Inboxes and Inbox folders. **_We do not recommend that you complete your own document reviews while viewing another viewer's Inbox._**

Selecting Visible Inboxes

You can select which users' Inboxes are visible to you in Primafact.

To choose which User Inboxes are visible:

1. click on the Select Visible User Inboxes button on the Inbox Toolbar:
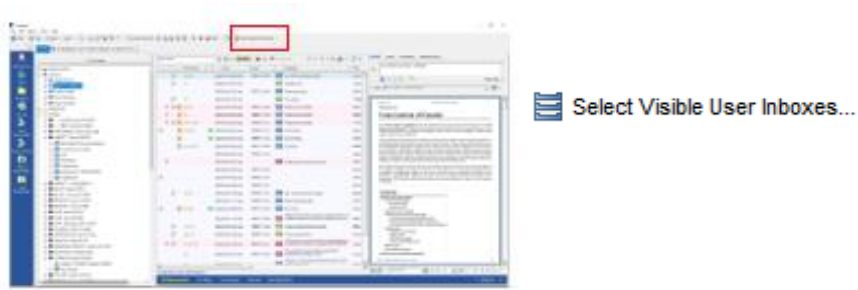
2. The Select Inboxes window will open.
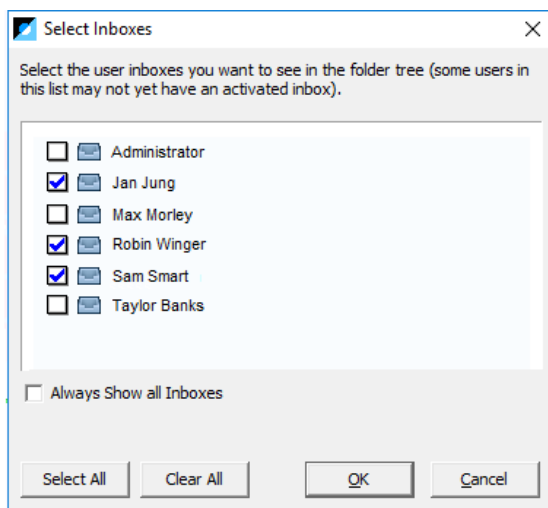
3. Check the User Inboxes you want to have visible in the Folder view. (Your own Inbox will not be visible on this list, as it is viewable by default.)

4. Click OK to save your selection.

Viewing another User's Inbox ("View As")

To view another User's Inbox, you will be viewing content from the perspective of that user. You can tell you are in another user's inbox, because the Blue Tab Bar will change to a shade of purple and the other user's initials will appear on the left-side of the Tab Bar.
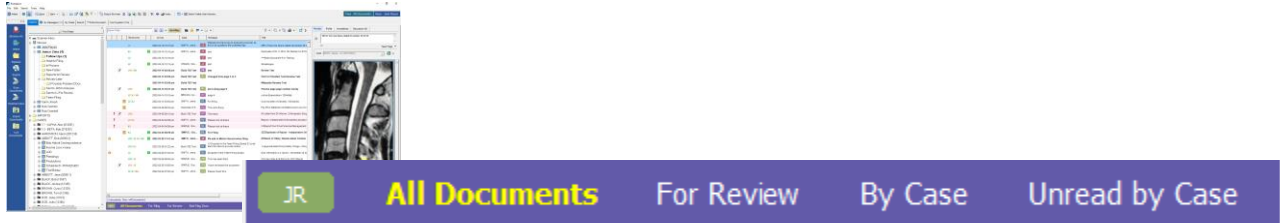
Note – *You do not have an* **Unread** *option available when "Viewing As" another user.*

Working with Annotations

Updated Coding Tools

Primafact's Annotation Forms have been updated to support more uniform visual coding, along with fields to enable quick assembly of Chronologies, Discovery Outlines and other reports.

Annotation Forms offer automation options for more efficient coding.

Annotation Form Updates

Simple and Expanded Form

The annotation form can now be expanded to hold more information. Clicking the **Show More / Show Less** button at the bottom-right corner of the Annotation form will expand or limit the display.
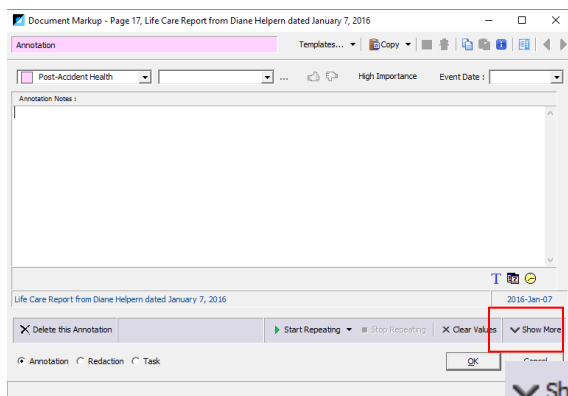
Simple Form: **Expanded Form**
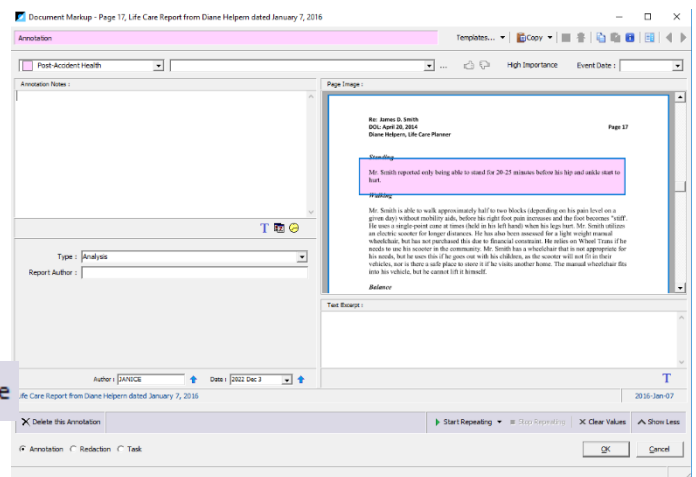
Additional Fields on Expanded Form:

In addition to fields on the Simple Form, Fields on the expanded form include:

- **Text Excerpt (New)**   Dedicated area for quoted document content, distinct from the Annotation Note field. Allows verbatim content to be included separately in Reports

- **Annotation Author**   Creator of the Annotation

- **Annotation Date**   Date Annotation was added to Primafact by Annotation Author

- **Annotation Type**   Optional Field – Defaults to Analysis. Dropd-down options include Fact, Handwriting, Highlight, and Question

- **Report Author**   Originator of document content

- **Page Image**   Annotated Page in Primafact – provides annotation convenient context.

Event Date & Time

The Event Date field is a new field displayed at the top-right area of the Annotation Form. It is designed to support event chronologies. This dedicated field is designed to preserve the date (and optionally, time) of the annotated content as it would appear in a chronological record of Case events.

Why use this field? Completing the Event Date (and optionally, the time) on an annotation form enables swift assembly of Case Chronologies.
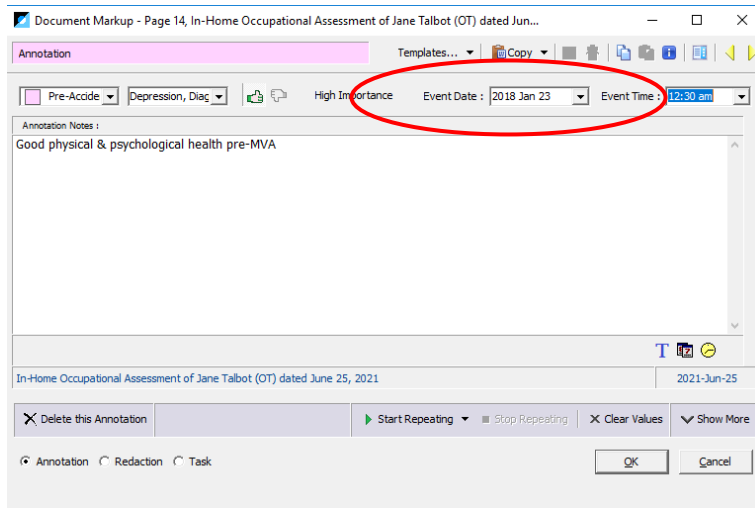
Labelled Color Coding

Primafact now includes up to 18 colors, which can be labelled by the firm for more uniform coding and more visual identification when viewing documents and binders.

Why use this field? Color-coding annotations with standardized colors & labels makes it easier to recognize the broader category of an annotation for more efficient Case preparation. Annotation Coding tools help to break down annotation content into manageable and relevant groupings for downstream Case preparation and analysis.
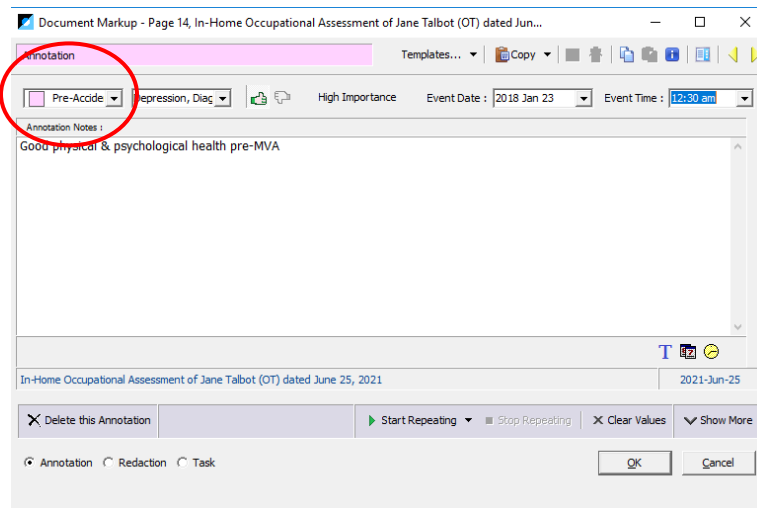
Issue Coding

While Issue Coding has been available in Primafact 5, you can now add Annotation Issues to Case Templates to more efficiently leverage document standards across Caseloads.

Why use this field? Issue coding allows more subtle categorization of Case Issues for refined analysis and reporting.

Favorability Coding

Dedicated favorability buttons (thumbs-up 👍 and thumbs-down 👎) make coding for adversarial value efficient and highly-recognizable. You can filter annotations by adversarial value to quickly assemble materials marked as notably helpful or adverse to your case.

Why use this field? Thumbs-up and thumbs-down buttons are instantly recognizable when viewing documents and binders – document views display the thumbs-up and thumbs-down codes right on the document, for instant identification when reviewing materials. You can filter annotations by adversarial value to quickly assemble materials marked as notably helpful or adverse to your case, making preparation for negotiations particularly efficient.
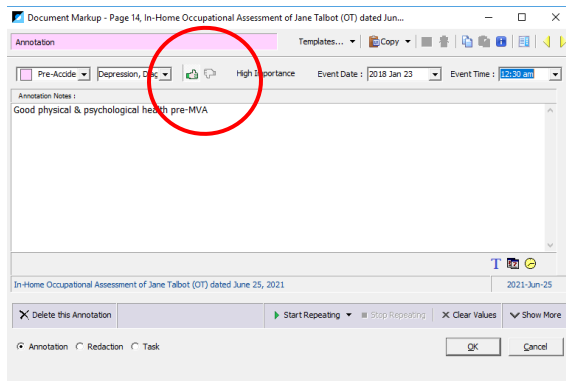
Text Excerpt

The Text Excerpt Field, found on the Expanded Annotation Form, is a dedicated location to house the verbatim excerpt subject of the annotation. You can auto-populate any OCR'd text in this field by clicking the **T** button below the bottom right-corner of the Text Excerpt field.

Why use this field? Designed for building reports, the Text Excerpt field provides a distinct area to house text citations, distinct from reviewer comments in the **Annotation Notes** field.

Working with Annotations – Advanced Efficiencies

New automation tools, including Annotation Templates and Annotation Repeat tools are designed to make repetitive coding more efficient.

Annotation Copy

Copy Annotation Content to another Annotation

Use the Annotation Copy button to copy instantly copy Annotation content into another Primafact Annotation.

1. Open the annotation you wish to copy.

2. Click the Copy button.
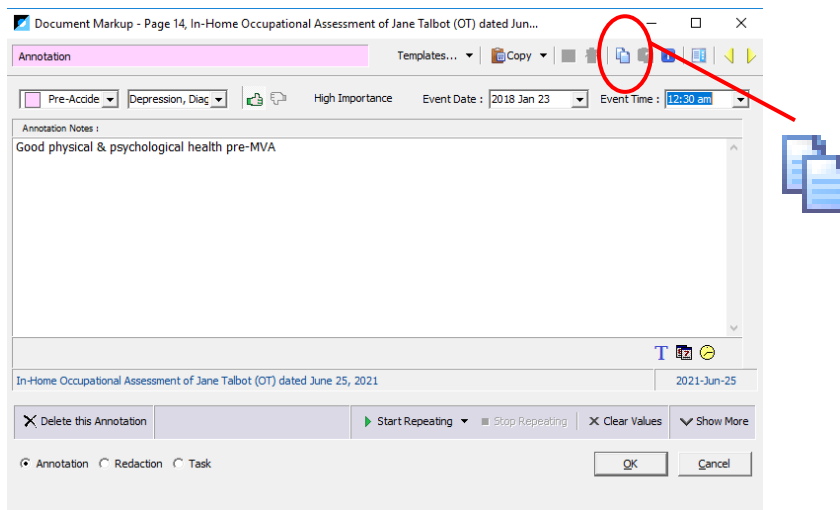
3. Click OK to close annotation.

4. Create new annotation in desired location.

5. Click Paste Annotation button.
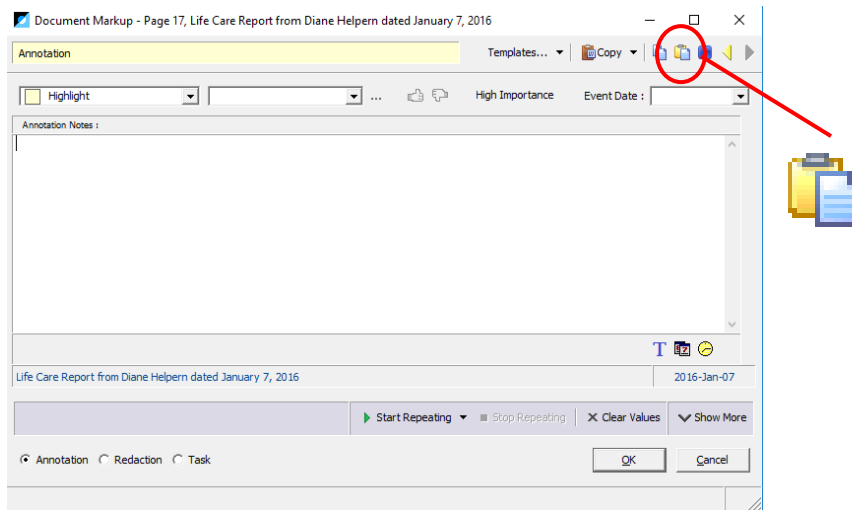
6. All copyable fields will populate the current annotation.

7. Click OK to save and close.

Annotation Repeat

The Annotation Repeat tool makes repeat annotations, such as identifying references to a specific issue, quicker and more efficient. You can repeat with or without the annotation dialog. (Repeating with the annotation dialog works well when you want to repeat specific fields and add additional annotation-specific coding. Repeating without the annotation dialog works well when you want to repeat coding and quickly move on.)

Using Annotation Repeat

1. Open an annotation form (this can be a new or existing annotation).
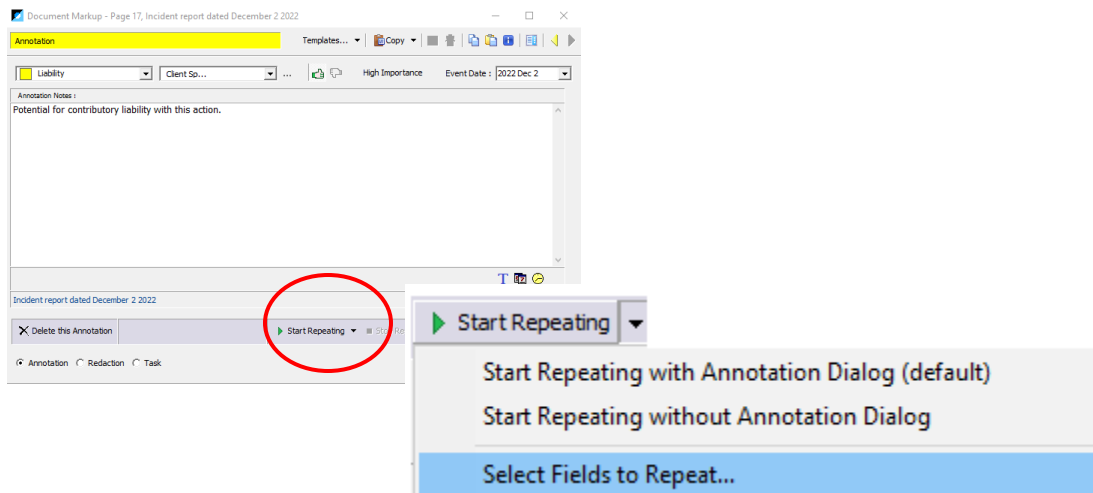
2. Populate the fields you wish to repeat.

3. *Optional – Select Fields to Repeat*

   a. Click the Start Repeating dropdown button > Select Fields to Repeat button to select which fields you will repeat from the available options.

   b. Check the desired items from the Annotation Auto-Repeat Options checklist. Click OK. (Primafact will use the last selection if you do not select fields to repeat. Primafact will use the default selection if you have never selected fields to repeat.)

4. *Repeat with or without Annotation Dialog:*

   a. **Repeat with Open Annotation Dialog:**

      i. Click Start Repeating

      ii. Create a new annotation. Annotation Form will open with selected fields populated. Update as desired. Click OK to save and close.

      iii. Annotations will continue to open with selected fields repeated until Repeat is stopped.

b. **Repeat without opening Annotation Dialog**

   i. Click Start Repeating dropdown

   ii. Click Start Repeating without Annotation Dialog
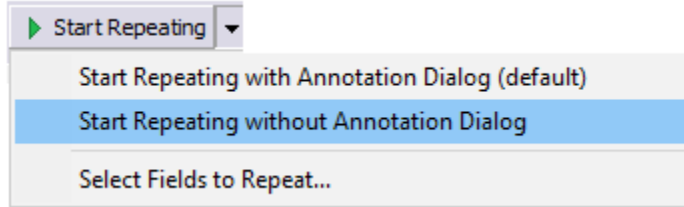
   iii. Create a new annotation. Annotation will be created with selected fields populated without form opening

   iv. Annotations will continue to be created with selected fields repeated until Repeat is stopped.

   v.

Stopping Annotation Repeat

When you are ready to stop repeating your Annotation, **click** the green **Stop Repeating** button at the top-right of your Primafact window.
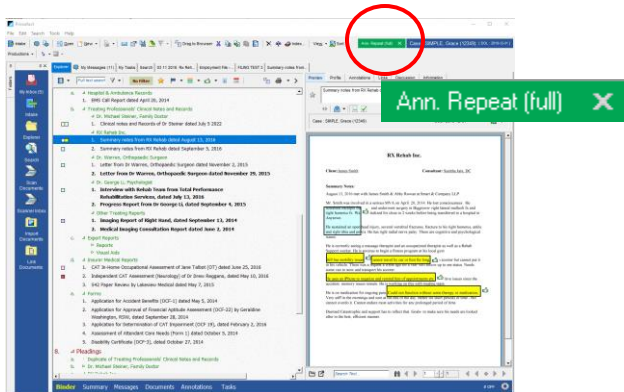
Create Chronologies and Reports

Comprehensively and consistently annotating your Case documents means more effective future preparation. Applying structured annotation coding makes it possible to pull together detailed reports in moments, for efficient preparation and review as your case progresses.

Reports are assembled using the Annotation List View, and can be easily exported to Word, Export, Excel and PDF.

You can create highly customized reports in a table format, based on your requirements. Report examples include:

- Detailed Chronologies
- Issue Chronologies
- Discovery / Witness Preparation Charts

The Annotation List View

Reports are assembled using the Annotation List View, which can be accessed by selecting the **Annotations** option on your Blue Case ribbon. You must select a Case Binder to view the blue Case Ribbon.
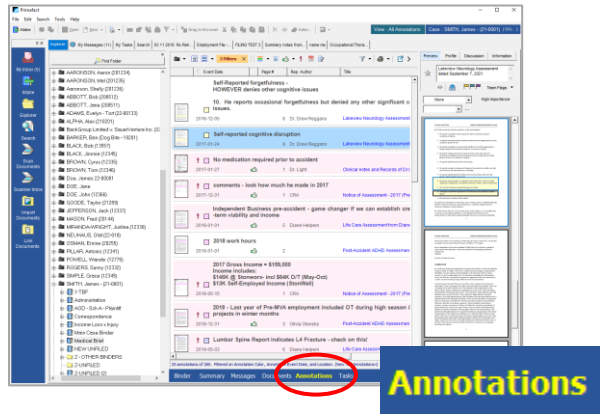
Note: You can create custom Annotation List views to precisely set the columns and sort order of chronology reports exported to Word. See Customizing List Views below.

Assembling your Report

To display the specific content required for your Report you will typically filter and sort the Annotations appearing on your List.

To change the displayed annotations from the content displayed by default, you can filter and sort. You can also use saved Views to quickly apply pre-set Annotation List formatting and filters. *See Customizing List Views, below for details on customizing your List View to display a custom report formatting and filters.*

When you have your Annotation List filtered and sorted into the desired content and presentation, you are ready to export your report.

> **Create customized Annotation List views for quick and precise control over the appearance and order of exported reports and chronologies.**

Export to Word

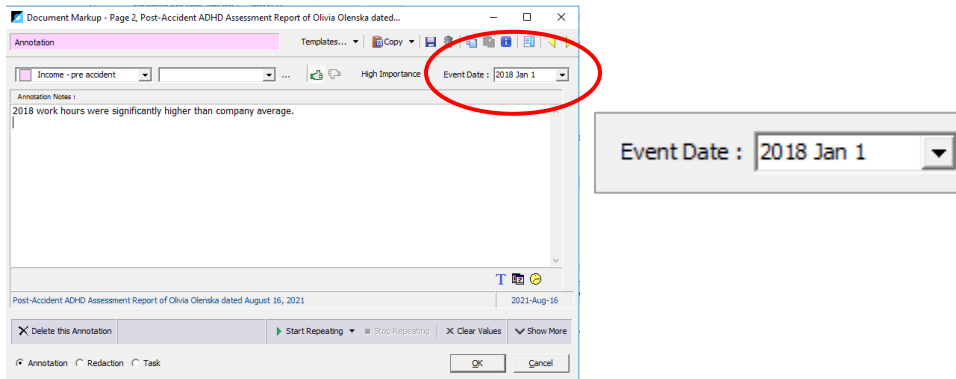To export your displayed Annotation List to a Word table

1. **Click** the Report Dropdown and select Copy to Clipboard (for Word)
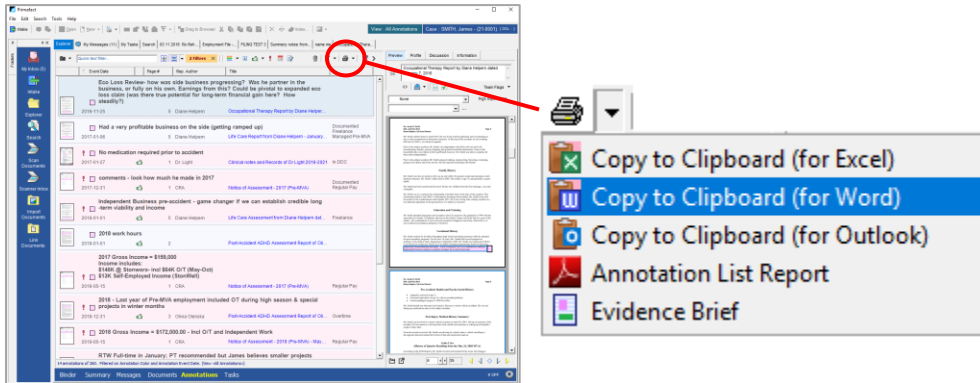
2. **Paste** into your Word document.

Create a Chronology

Assembling an Event chronology requires the Event field to be completed on your Annotation forms. Event chronologies use the date in this field to sort by date.


If your list is sorting by another column, you can sort your *Event Date* column to present your annotations in chronological order.

Simply **click** on the *Event Date* column to sort your displayed annotations in ascending or descending date order.
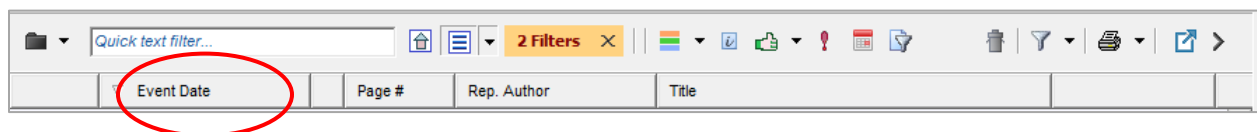
If your displayed view does not include an *Event Date* column, switch to a view that includes the Event Date by clicking on your **View Selection Dropdown**.
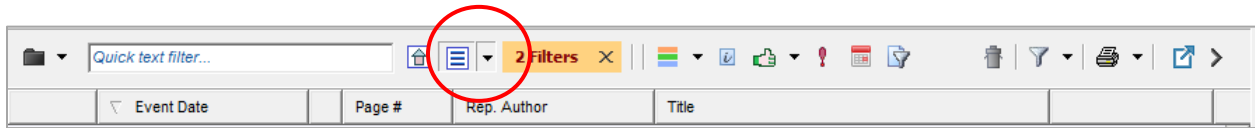
To add an Event Date column to your Annotation List, you can adjust your List Formatting to include different field selections and ordering. *See Customizing List Views, below.*

To export your chronology to Word use the **Report Dropdown**, as detailed in *Export to Word, above.*

Filtering by Date of Loss

Primafact includes a built-in DOL filter that allows you to filter to events occurring pre-DOL, or on and after the DOL. To use this tool, the DOL must have been entered into the Case Summary.
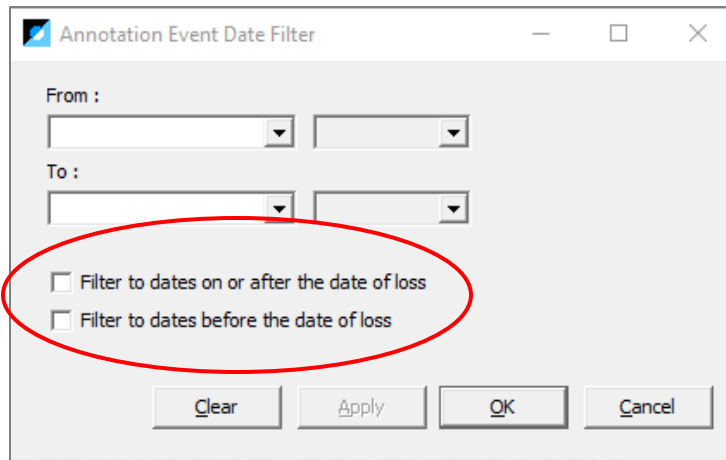
To filter a List by Date of Loss:

1. Select the Event Date filter on your Annotation List
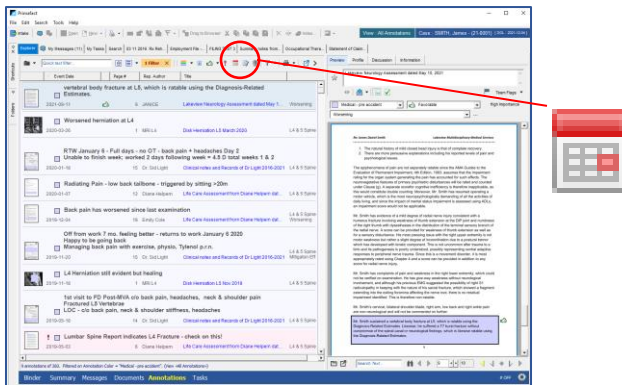
2. The *Annotation Event Date Filter* dialog will appear.

3. Click the appropriate **checkbox** to filter to dates before or after the Date of Loss, as applicable:

4. Click **OK** to apply filter.and close dialog.

Annotation Batch Updates

You can now update multiple annotations on a single Case in the same operation using the Annotation List. This is a good way to update large numbers of annotations if you are using new coding values.

You can use this option to

- ✓ replace or amend certain values (e.g. turn light green annotations to mid-blue)
- ✓ update other fields (e.g. find green annotations and add favorability coding)

You can update:

- ✓ all annotations
- ✓ all filtered annotations
- ✓ selected annotations (selected using CTRL+ select or SHIFT+ select)

! Be careful when Batch Updating – there is no utility to automatically revert back to prior coding if you make a mistake. Firms may wish to limit personnel permitted to perform batch updates.
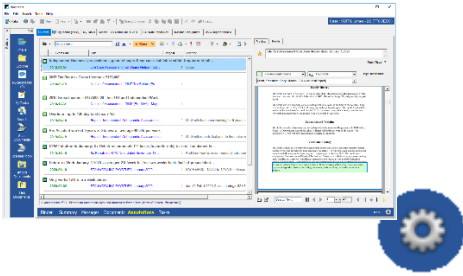
To perform a batch update:

1. Filter your Annotations to the items you wish to update (in this example we've filtered to all of our Case annotations coded green):
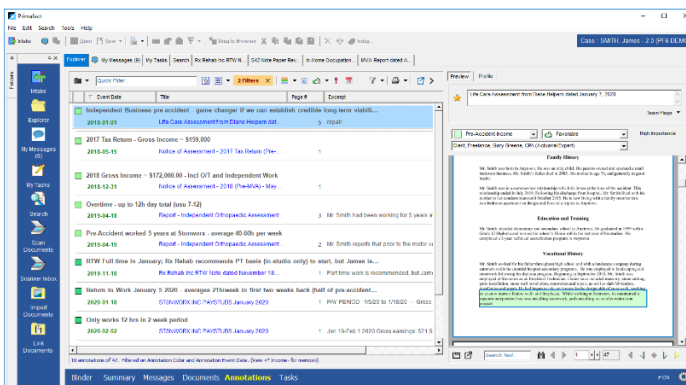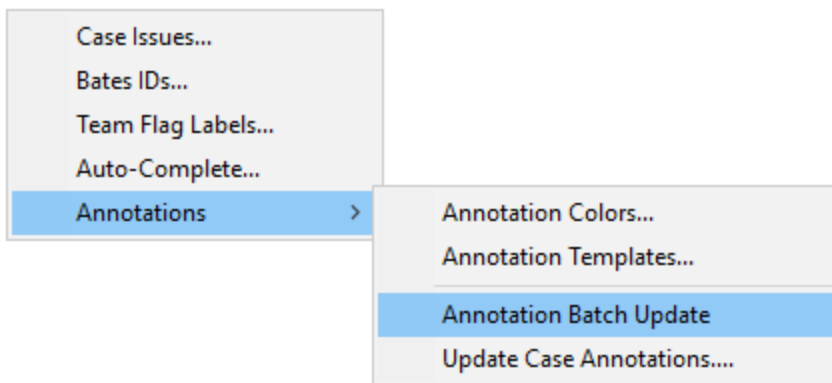

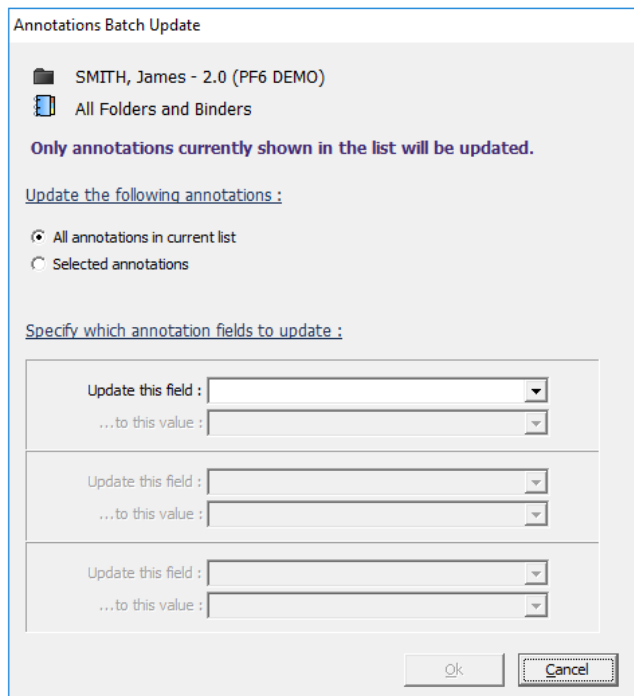2. Optional: Select specific annotations from this list (if desired).

3. Click the Gear icon on the bottom-right corner of the Annotation screen:


4. Select Annotations > Annotation Batch Update

5. The Annotations Batch Update will appear.

6. Choose which annotations you wish to update:

    a. "**All annotations in current list**" means all annotations in your current view, which may be filtered

    b. "**Selected annotations**" means annotations you have manually selected using **CTRL+select** or **SHIFT+select**

7. Choose the field you wish to update using the dropdown:
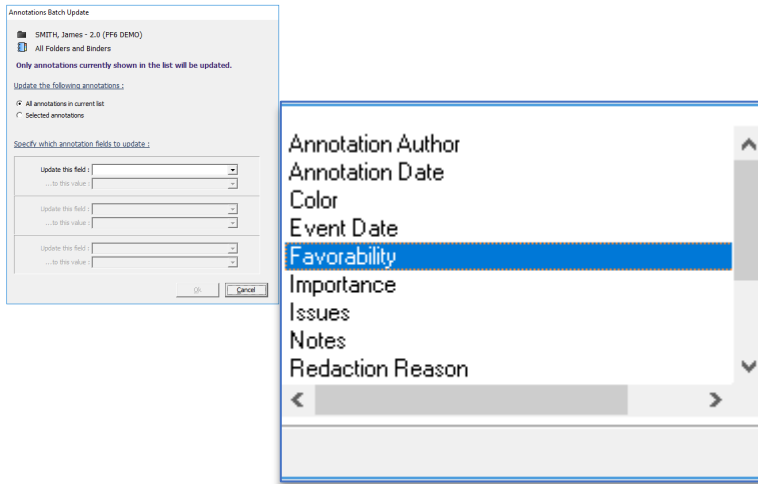
8. Next select the updated value (options will vary by field selected)
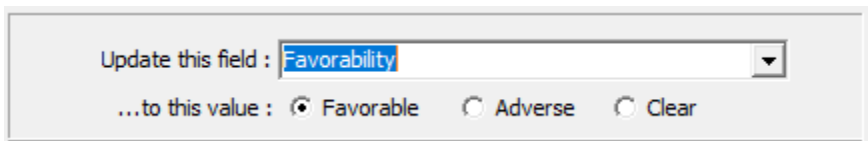
Remember - in this example, we want to take all of the annotations coded "green" and make them "favorable." We have filtered to "green" and are now updating the favorability field to "favorable."

9. Repeat step 7 on the next value if desired. (e.g. I may wish to take all the green annotations converted to favorable and change the color to something else, like yellow or blue).

Customizing List Views

Creating multiple List Views in Primafact makes it easy to switch list displays at the touch of a button for more relevant case viewing and report assembly. Customizing views makes it quick and easy to suit your precise needs when viewing Case materials in Primafact.

Views can include specific fields and formatting, as well as pre-set filters for quick and consistent list presentation.

One major benefit of customizing Annotation List views is that it enables you to precisely select the data fields and sort order appearing in your exported reports and chronologies.

This section shows how to work with *Annotation List Views*, but these instructions also apply to setting views for other lists including your Inbox and the Document List View.

The Home View (Default List View)

The Home View is the default view that you view when you first open a List view. You can change your home view if you prefer to see a different default display. You can quickly reset your display to the home view by clicking the home view button at the top of your list toolbar.
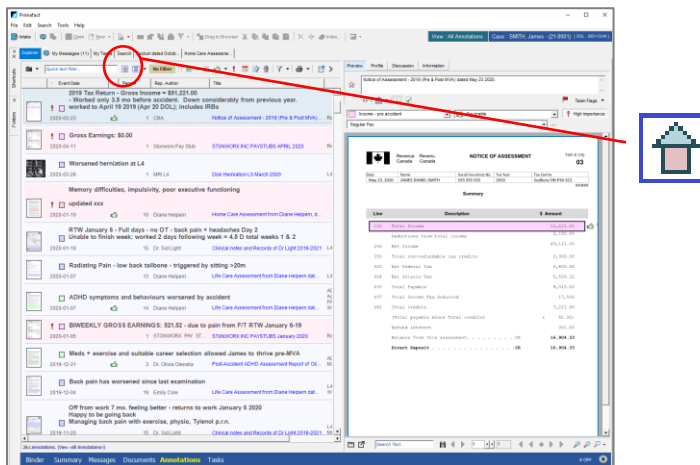

To change your Home View see *Change Your Default Home View*, below.

> **One benefit of customizing Annotation List views is precise control over the appearance and order of exported reports and chronologies.**
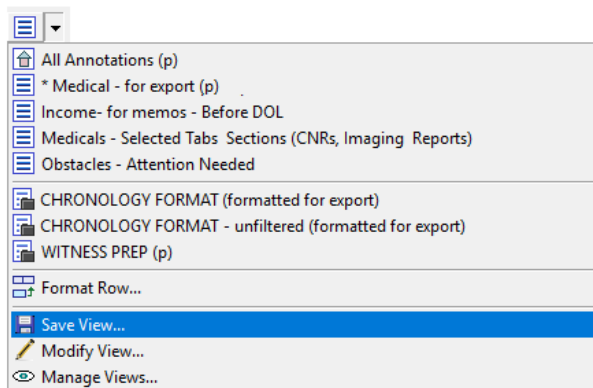
Creating a New View

You can create custom views to display your lists with your preferred fields, formatting, filters and sort tools.
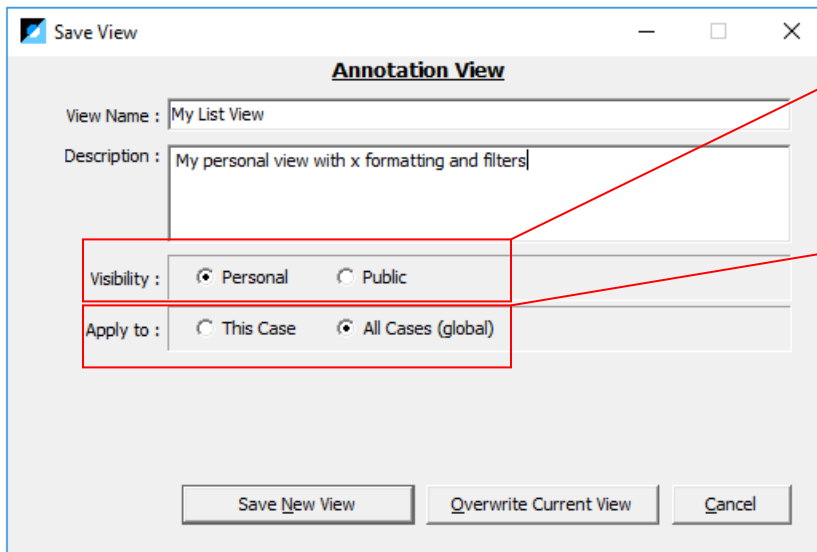
1. To avoid overwriting an existing view, start by saving your new view. Click the View Dropdown on your list toolbar:
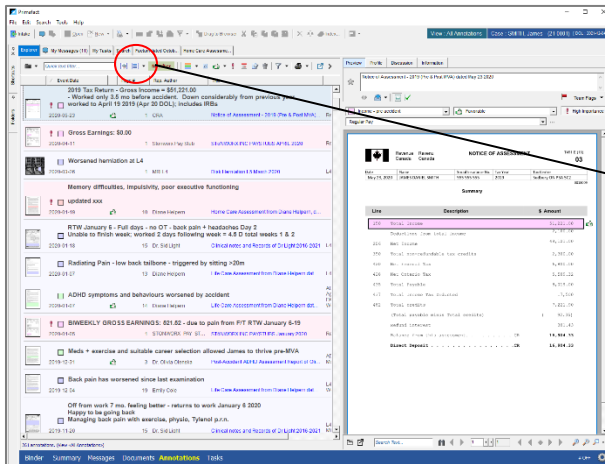
2. Click Save View.

3. Name your view and add a description for future guidance.

Visibility: Click **Personal** if you are creating the view for yourself or **Public** if you wish to create a view for other users.

Apply to: Click **All Cases** to use this view in other Cases. Apply to **This Case** will make this view available to this Case only. (Case views can be copied to other Cases using the Updating Existing Cases Using Case Templates feature)
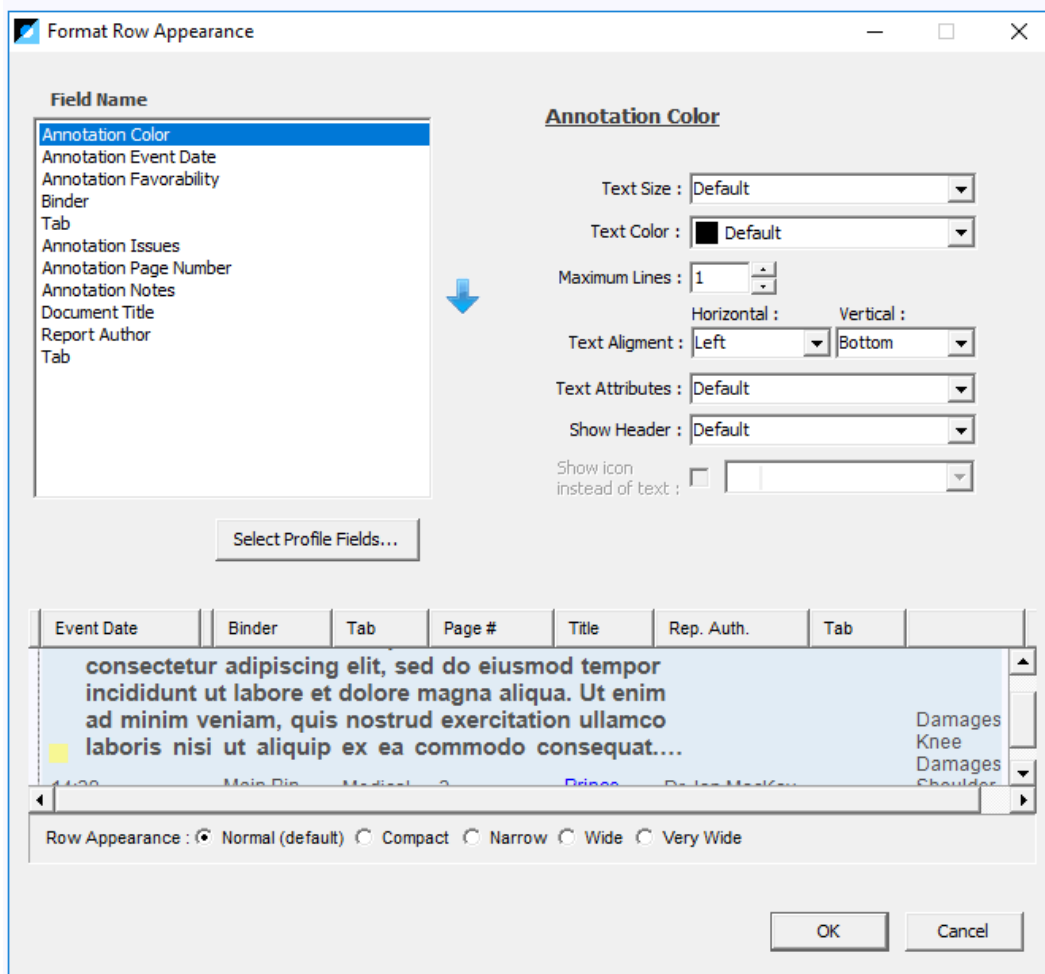
You can complete this step once you have finished creating your View, but doing this step first helps to preserve existing Views without unintentionally changing existing settings.

Formatting your View:

1. To format your current view, click the *View* dropdown on your List toolbar and select **Format View**.
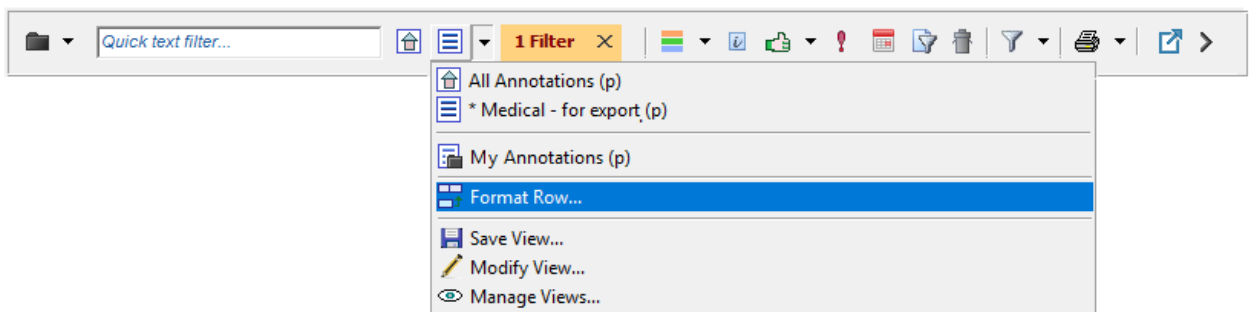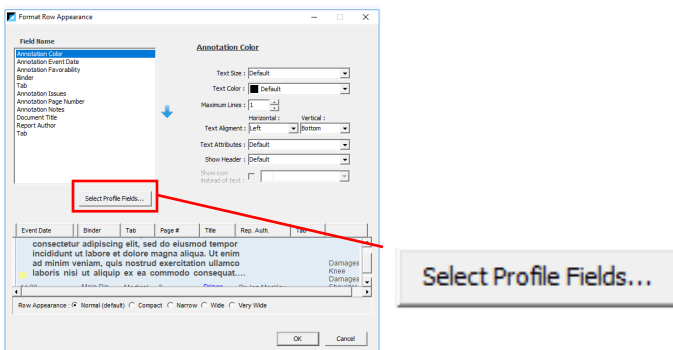
2. The *Format Row Appearance* dialog will open.

This is where you can specify which fields appear on your list, the order of your list columns, and row formatting (size, color *etc.*)

3. **Selecting Columns appearing on your list:** To select which columns appear on your List click the **Select Profile Fields** button on the *Format Row Appearance* dialog.

4. **The Select List Columns** dialog will open.

5. **Click** items from the columns and use the blue arrows to add or remove fields from your List.
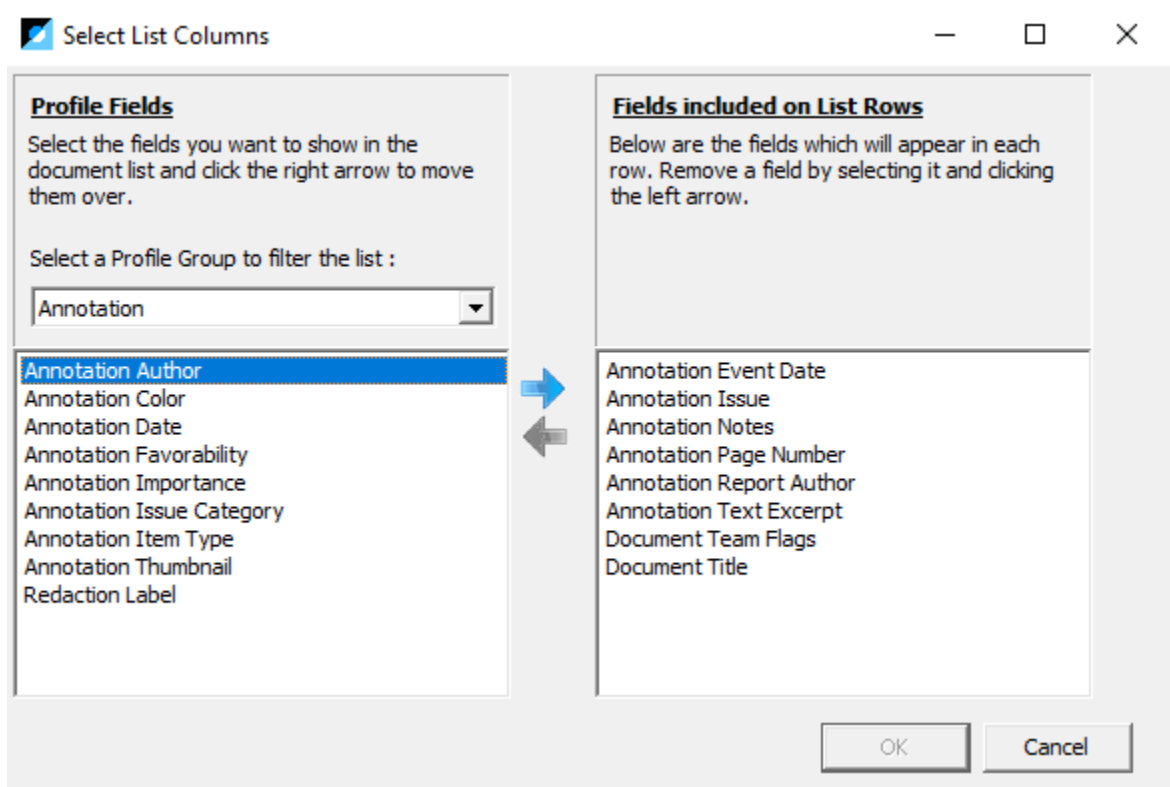
Note: *You can include fields from other areas of Primafact (such as System fields including Team Flags and document Reviewer Information, or other Profile Categories by using the Profile Group Dropdown to change your Profile Field selection options:*
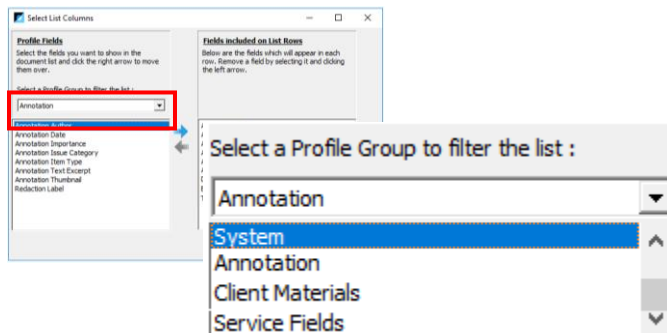
TIP: *If you are creating a view for export to Word, keep in mind the number of columns that will comfortably fit on your page when adding columns to your view*

6. Once you have selected your fields, click OK.

*Note:* *Reports and Chronologies export to Word in Table format. If you are creating a view for export to Word, keep in mind the number of columns that will comfortably fit on your page.*

7. Next, on the *Format Row Appearance* dialog, use the blue up and down arrows to position your fields in the desired position on your list – items from top to bottom are displayed from left to right on your list.
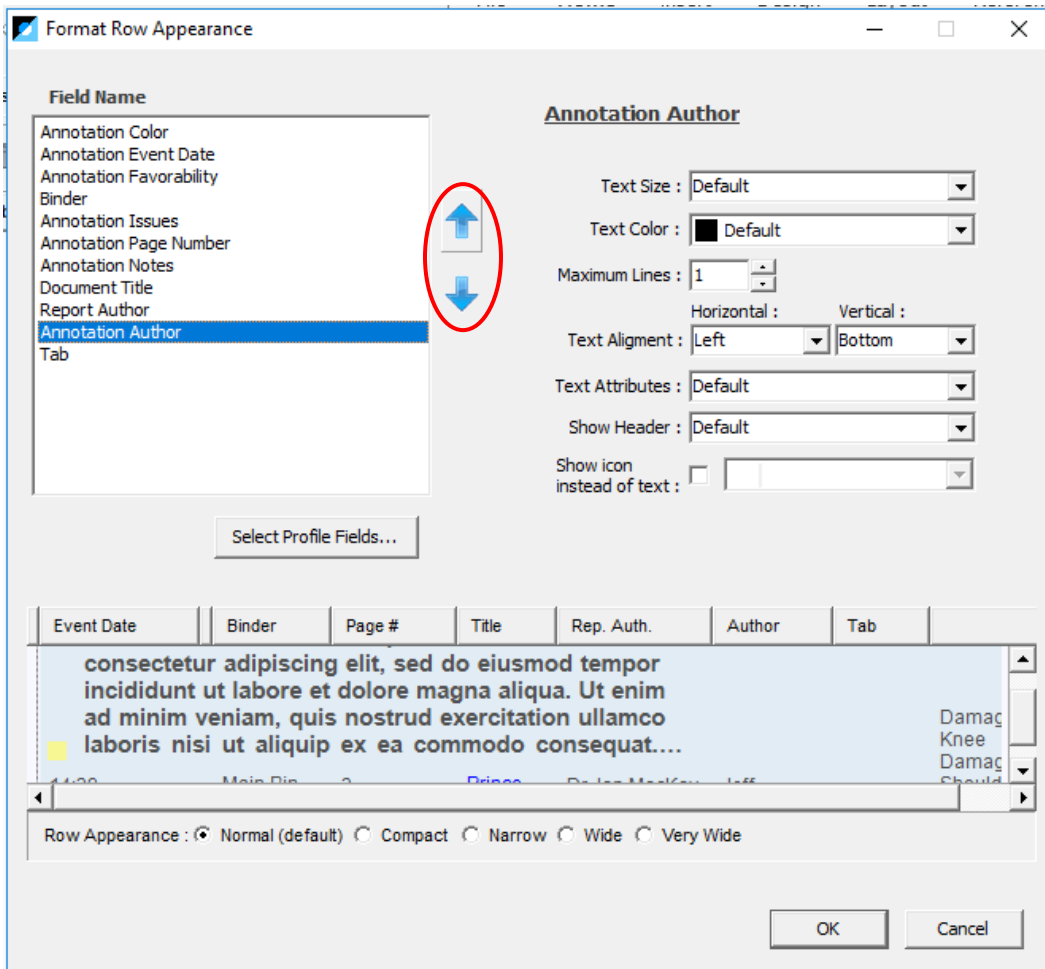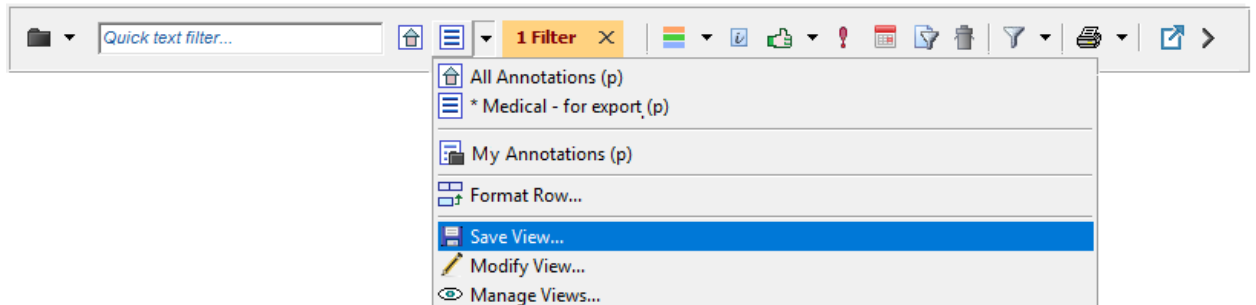
8. **To Change Column Formatting**, such as changing text color or size, click on the field name and make your column formatting selections on the right hand side. In this example, I am making the author column text bold and pink for quick visual identification:
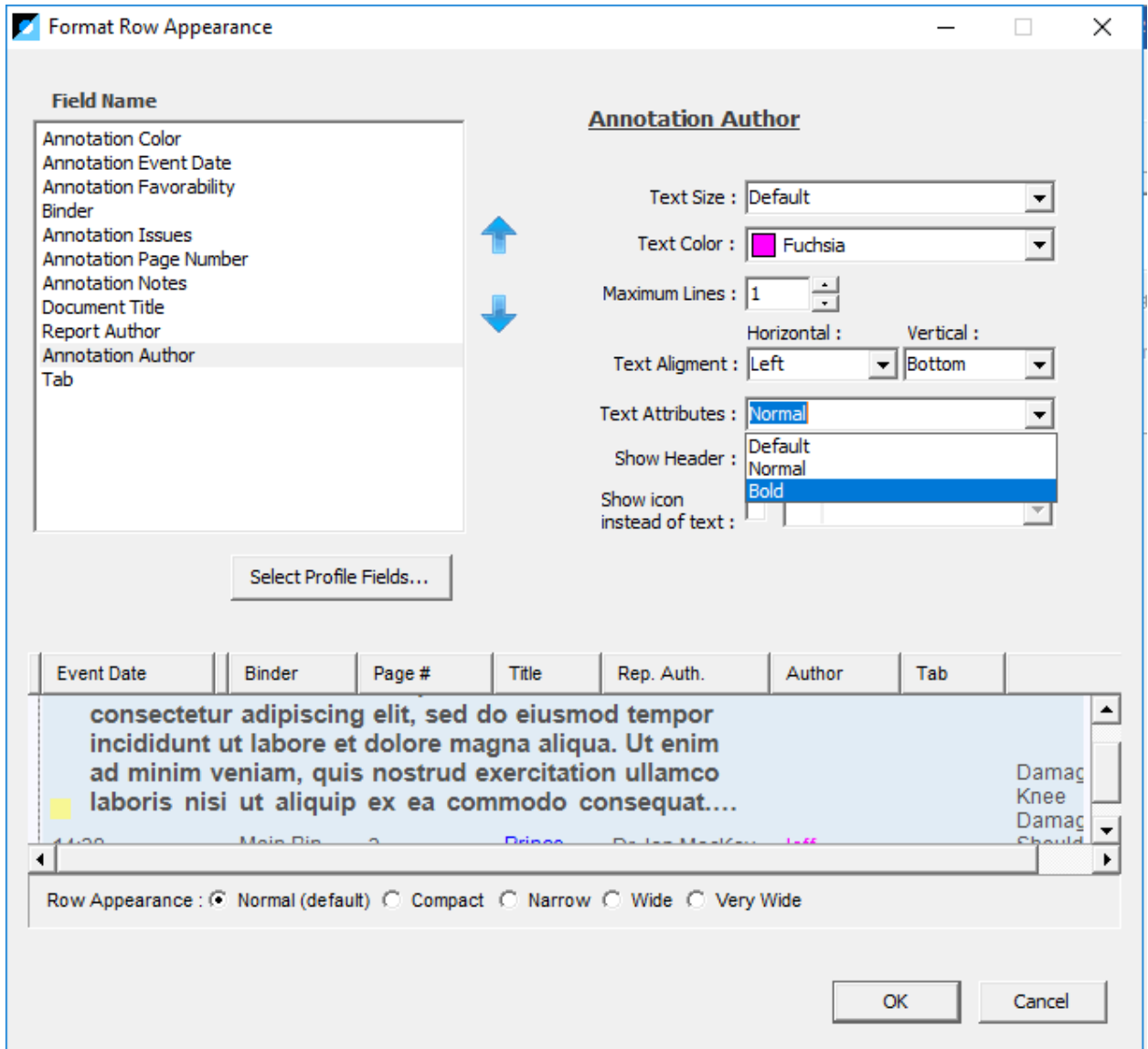
Save your View.

9. *If you are Saving updates to an existing list*, select the Overwrite View option.

   If you are saving a New view, name and save as a New View, completing the Visibility and Apply to fields.
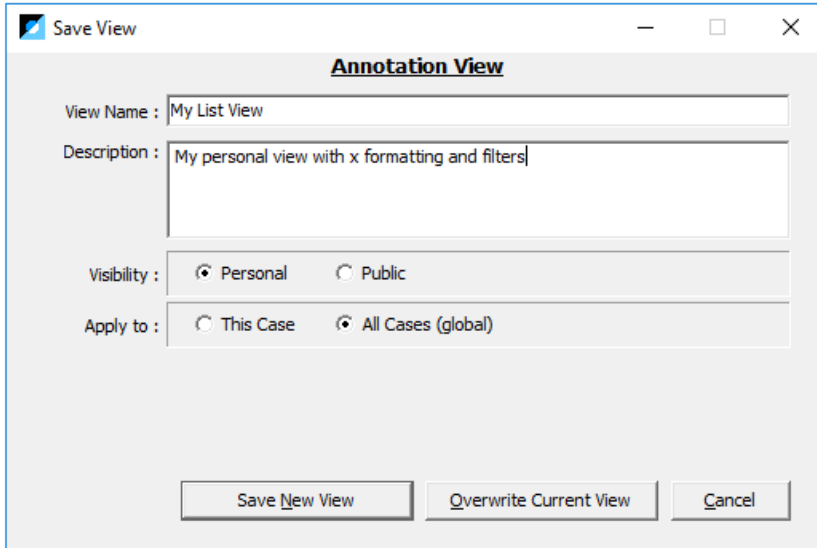
Additional View Formatting – Sort Order, Groupings and Filters

To specify your list's sort order (essential for chronologies), as well as applying groupings and additional filters, you will need to use the ***Modify Annotations View dialog***.

1. Click the *View* dropdown and select Modify View.

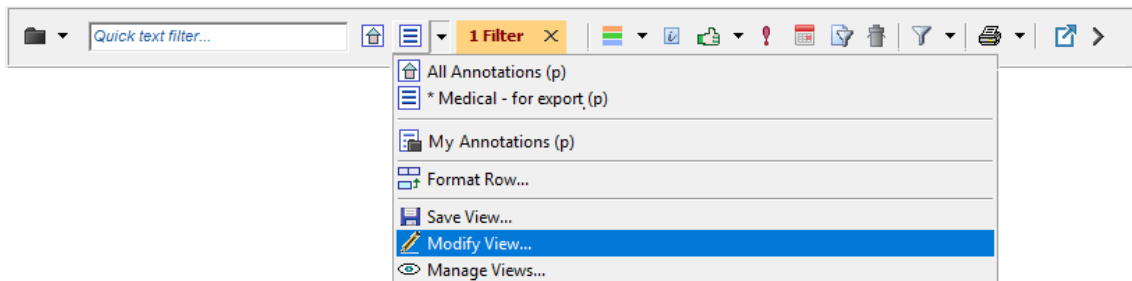2. The Modify Annotations View dialog will open.

3. Adjust your settings as desired. Click the Descending checkbox to sort in descending order (*e.g. Z-A, or most recent items on top.*

4. Click OK to apply and Save your settings to your Saved View.

NOTE: You can also select Profile Fields, format Row Appearance and visibility using the Modify Annotations View dialog, so if you are creating a very detailed List View, it can be helpful to start with this screen after creating your view.

Change your Default Home View

You can select any of your Saved Views to appear as your Home View on your List Screen, to make it convenient to access your most frequently-used view settings.

1. Click the View Dropdown on your list toolbar:
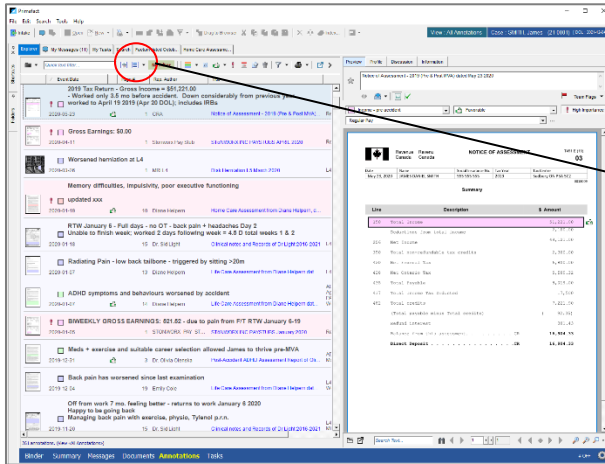
2. Select Manage Views.

3. The Manage Views dialog will open.
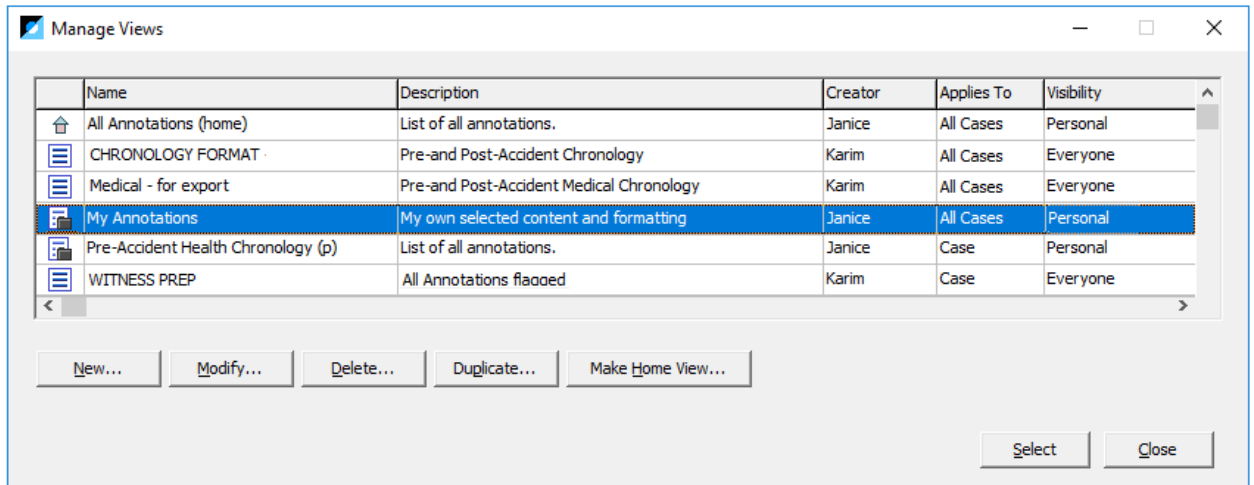
4. Click the **Make Home View** button. Click **Yes** to proceed and set your new Home View.

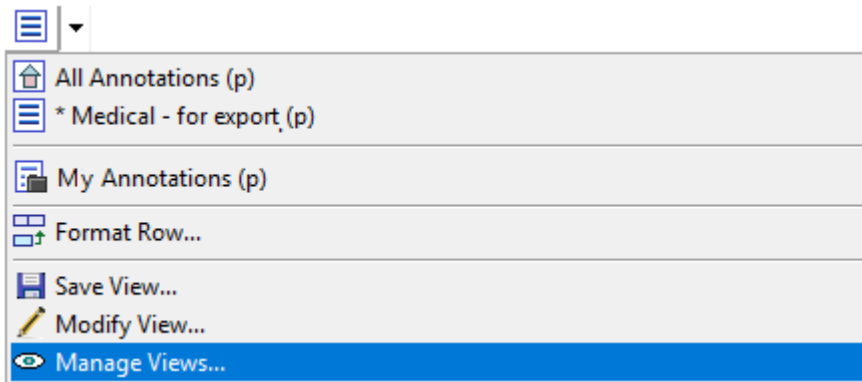   *Note: If your selected view is an* All Cases *view, this will reset your Home View for this List Type across all Primafact Cases. (This will not impact your Inbox Home View Settings.*

   If your selected view is a Case *view, this will reset your Home View for this Case only. (If this setting is applied to a Template, the home view will be applied to Cases based on the Template, unless reset by the User.)*

   Resetting your own Home View settings will not impact other Users.

5. Clicking the Home button will open your new Home View.

Creating Electronic Briefs

Primafact 6 includes several new features designed to more conveniently assemble materials for sharing outside the firm right within Primafact. New features include

- ✓ **Highlighting** - Looks like a standard highlight, to direct attention to specific content and designed for export

- ✓ **Linking** - Allows linking to content outside Primafact (*e.g.* external websites, such as *CanLii* Case reports

  - Allows linking to Primafact Content (in the same exported document or Tabbed PDF)

- ✓ **Title Aliases** Add up to 5 alternate Document Titles to efficiently meet document naming requirements for court submissions – this preserves preferred document names without needing to duplicate new documents for other purposes

- ✓ **Binder Bundles** - New Binder type designed for export; includes title alias selection for exported document and document sets

Adding Highlights

You can add highlights to your documents in Primafact 6 to call attention to key content. Highlights are designed to be shared outside the firm, and you can elect to include or exclude highlights when exporting your documents as PDFs.

Using the highlighting tool to add a highlight:

1. Open your document.

2. Select the Highlight tool from the markup options on your toolbar.
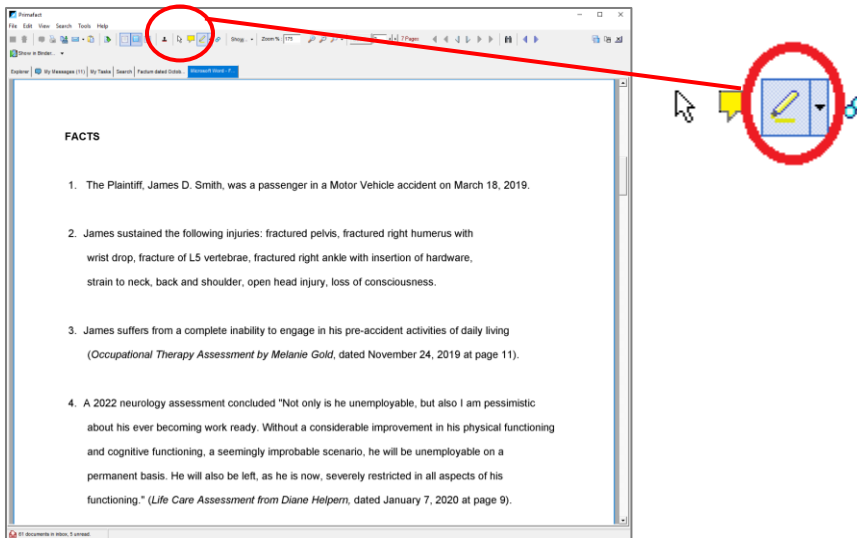
3. If desired, use the Highlighter dropdown to select a different highlight color.

4. The highlighter tool will appear.

5. Draw one or more boxes around the text you wish to highlight. (Highlight boxes can be selected and resized.)

6. Click to set highlight.

    Highlights appear as transparent linear overlay over document content:
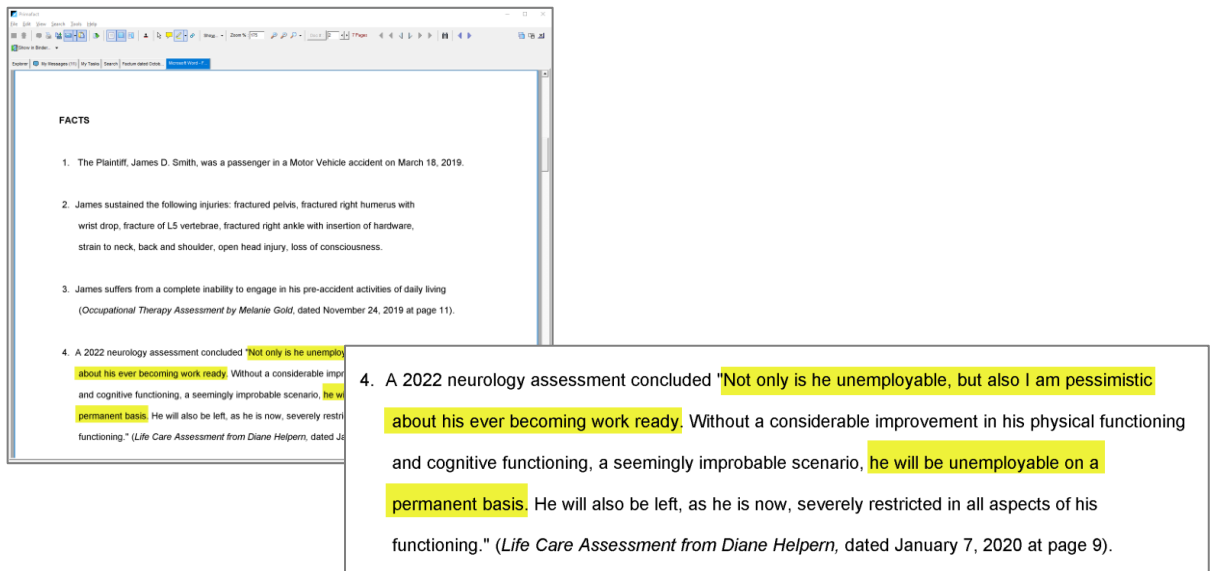
7. When you have completed highlighting reset markup tool to pointer or annotation setting:
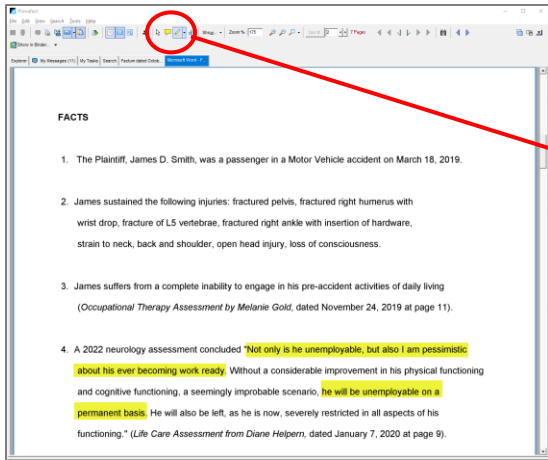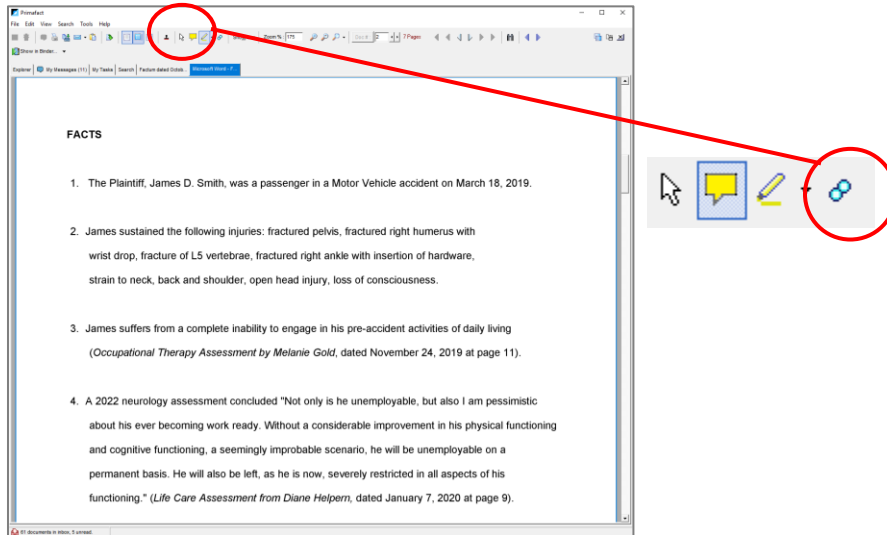
Adding Links

You can add links to your Primafact documents to other Primafact document locations and to online resources outside Primafact. Links can be included in PDF exports from Primafact.
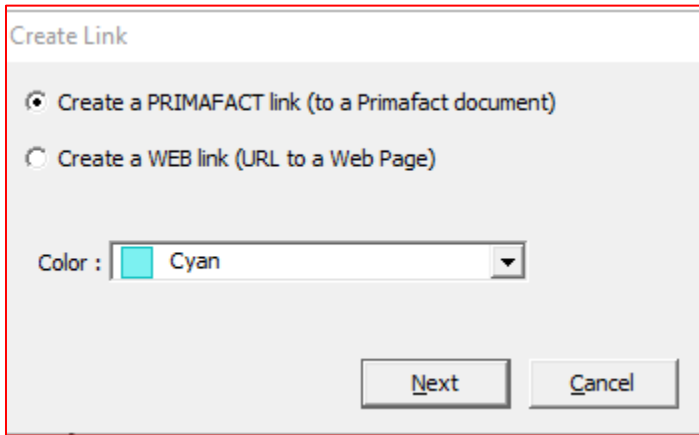
Using the linking tool to add a link to a Primafact location:

1. Open your document.

2. Select the **Linking** tool (the document markup setting defaults to "create annotation").

3. The link tool will appear.

4. Depress your left mouse-click button to draw a box around the area where you want to insert your link.

5. The *Create Link* dialog will open.

6. You have the option of Creating a PRIMAFACT link or a WEB link. If linking to a Primafact document, **click** the Create a PRIMAFACT link checkbox. Adjust the color if desired.

7. Click Next.
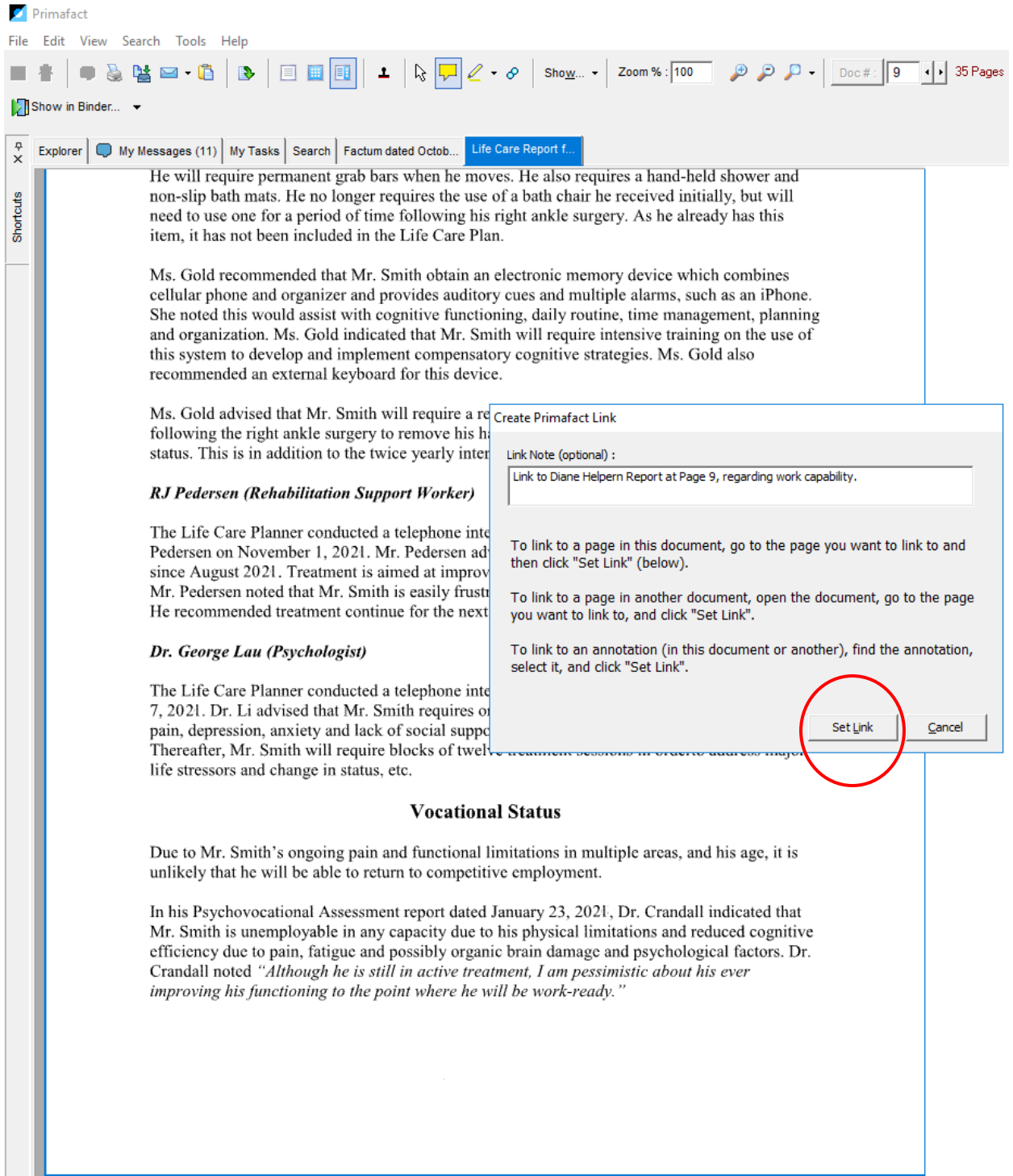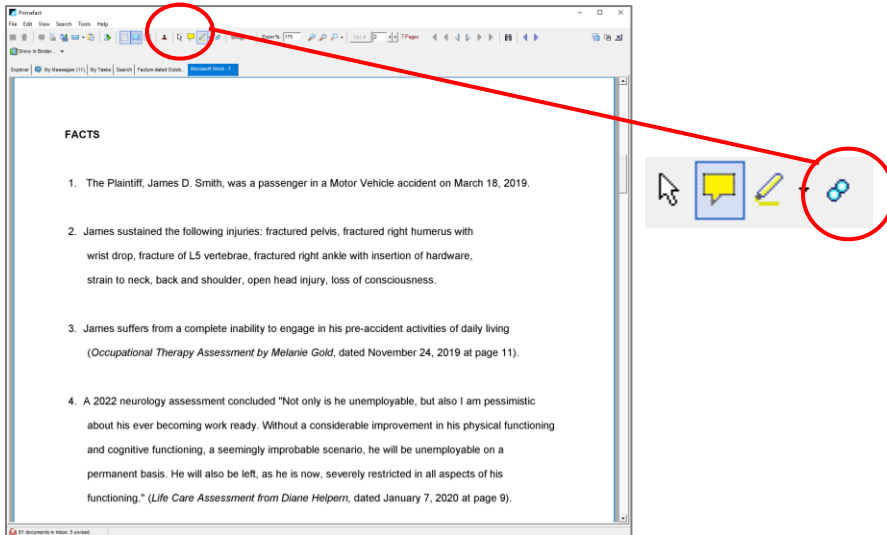
8. Add a link note if desired.

9. Navigate to the desired location in Primafact where your link will lead.

10. Click Set Link.

11. Link will be set to the specified Primafact location.

Using the linking tool to add a web link (location outside Primafact):

1. Open your document.

2. Select the **Linking** tool (the document markup setting defaults to "create annotation").

3. The link tool will appear.

4. Depress your left mouse-click button to draw a box around the area where you want to insert your link.

5. The *Create Link* dialog will open.

6. You have the option of Creating a PRIMAFACT link or a WEB link. If linking to a Primafact document, **click** the **Create a WEB link** checkbox. Adjust the color if desired.
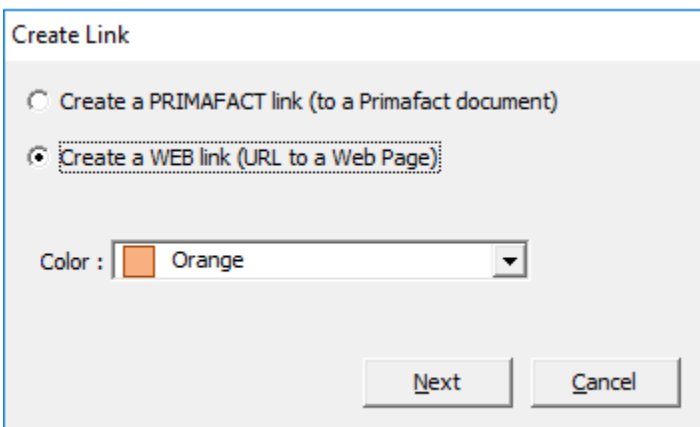
7. Click Next.

8. Add a link note if desired.

9. Specify the web link URL address.   (Primafact will support Chrome's link to highlight feature, to direct link to a specific web page location, such as specific *CanLii* paragraph citation.)

10. Click OK.

11. Link will lead to specified external link location.

Opening Links inside Primafact

Opening links on an open document

1. Right-click over Link location and click **Open Link**.

Opening links in the document Preview

1. Left-click on Link and select **Open Link.**

Adjusting Markup Display on a Document in Primafact

You can set visibility of document markups on an open document in Primafact – this can be helpful if a heavily marked-up document is distracting.

To adjust markup display settings:

1. Click the Show dropdown on the open document toolbar:
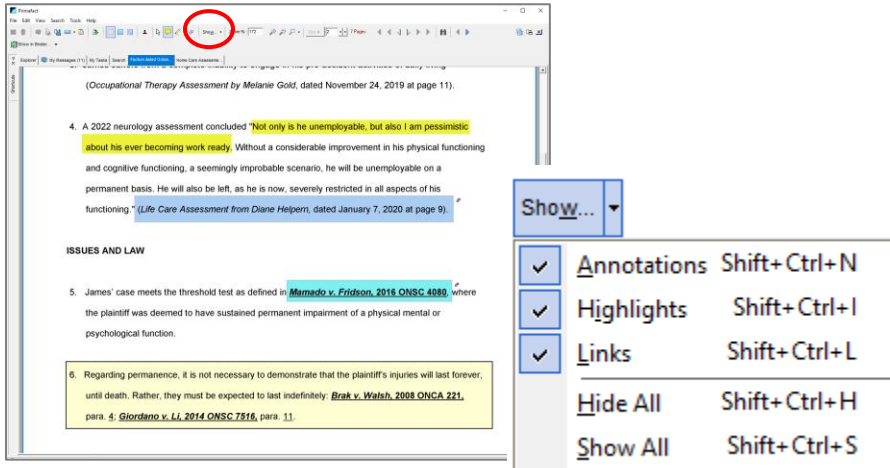
2. Click the markup items you wish to hide or display.

Bundle Binders

The Bundle Binder is a new type of Binder designed for sharing documents with entities outside your firm, and particularly to support efficient creation and export of court submissions, including *CaseLines* submissions.

Bundle Binders include a number of features designed to facilitate e-brief production, including:

✓ **Multiple Title Aliases**, allowing you to assign more than one title to the same document, so the document can be renamed instantly depending on where the document will be submitted (*e.g.* Firm Document Standards and CaseLines titles can be applied to the same document)

✓ **Copy binder to Tabbed PDF** – This feature is available in Primafact 5, but designed for more streamlined application.

Create a Bundle Binder

1. Right-click your Case Binder

2. Select **New > Bundle Binder**
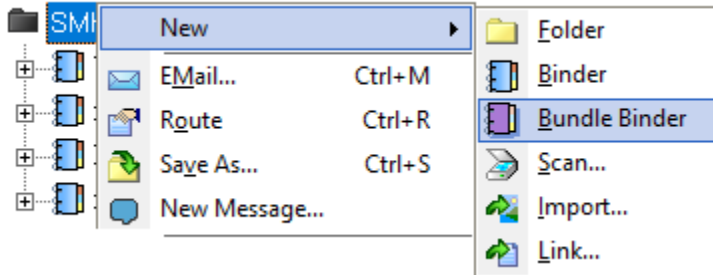
3. Name your binder, and add Tabs, Sections and Documents as applicable.

Using Document Alias Titles

***

Export a Bundle Binder as a PDF

Primafact 6 has updated the PDF export tool to support easy exchange of organized, multi-document tabbed briefs.

An exported bundle binder allows you to efficiently export a structured document set in a single tabbed PDF, including:

PDF bundle binders preserve links to other document locations in your bundle

- Bookmarks to each document
- Binder Page Numbering
- Alternate document Titles
- Highlights (if desired)
- Primafact links to other documents in the bundle
- Web links
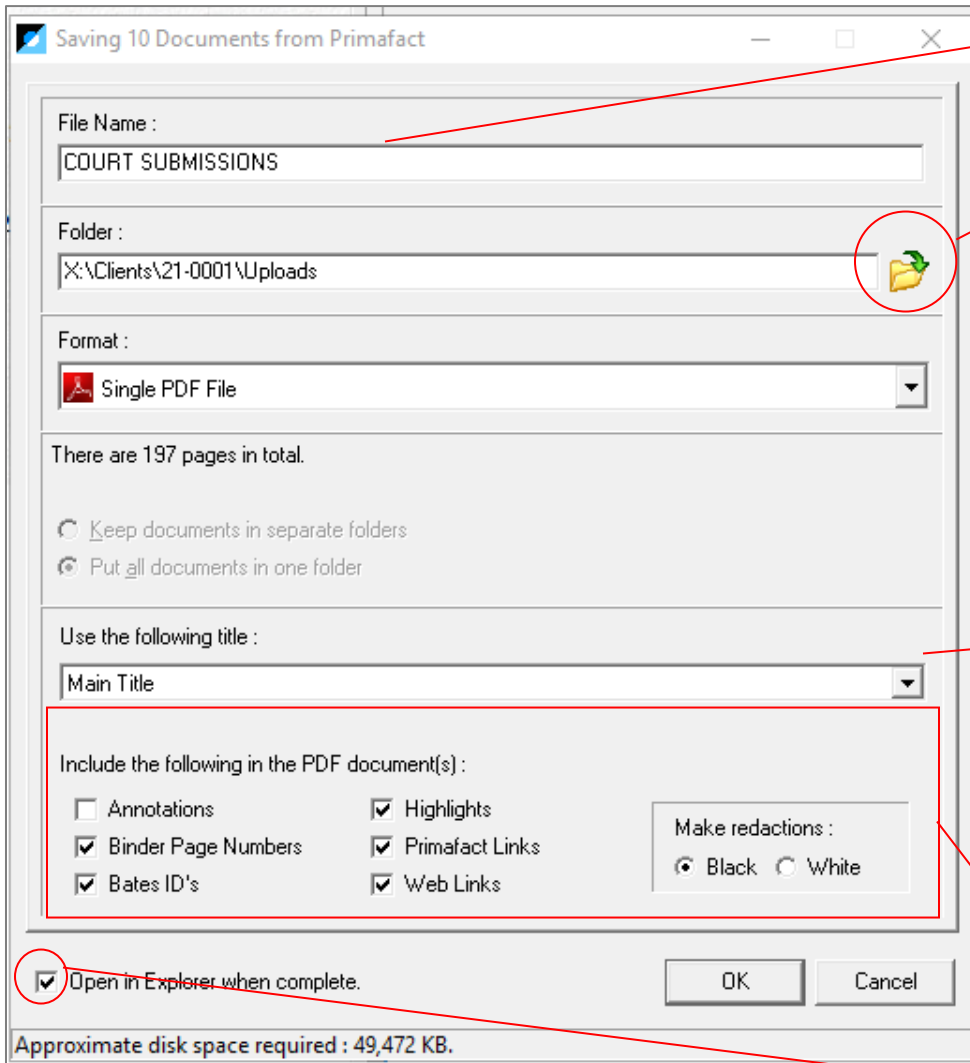- Bates IDs where applicable
- Annotations (if desired)

Large files can be easily uploaded to *CaseLines*, online portals, document exchange tools and other locations outside Primafact.

To export your bundle binder as a PDF:

1. Click the Binder-to-PDF button at the top of the Bundle Binder
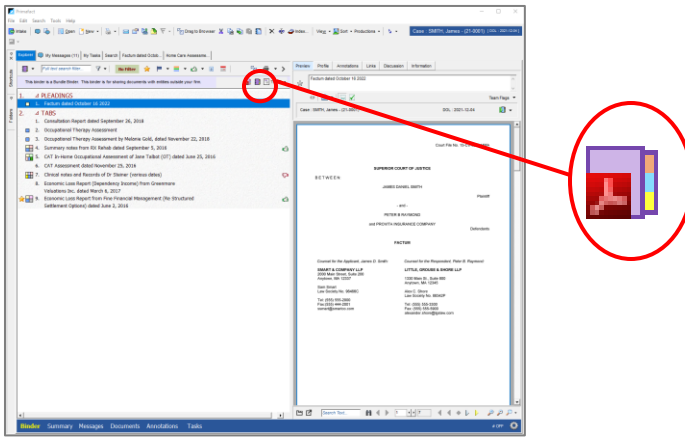
2. The Saving from Primafact window will appear

File name defaults to name of Binder. Rename if desired.

Change destination folder if desired by clicking browse button

Single PDF file selection will create a single tabbed PDF with documents ordered as they appear in your Bundle Binder

Document titles default to Title set selected in Binder, but you can use dropdown to select a different set of alias titles.

Other options may be included as desired

Click Open in Explorer checkbox to immediately access your saved PDF.

3. Select the desired output and click **OK** when complete.

Note: *To upload individual documents, see Upload to Portals, below.*

▶

Upload to Portals

Document Export (Copy to Browser)

You can now upload documents to browsers directly from Binders and Inbox folders[1]. This eliminates the "extra step" of dragging documents from Primafact to a local folder before exporting to locations in the Cloud.

Copy Documents to Browsers and other locations outside of Primafact

To copy documents directly to browsers or other locations outside Primafact, including Windows Explorer location:

4. Select your documents

5. Click the Export Button

6. A separate window will appear. Drag the Green box to your target window.
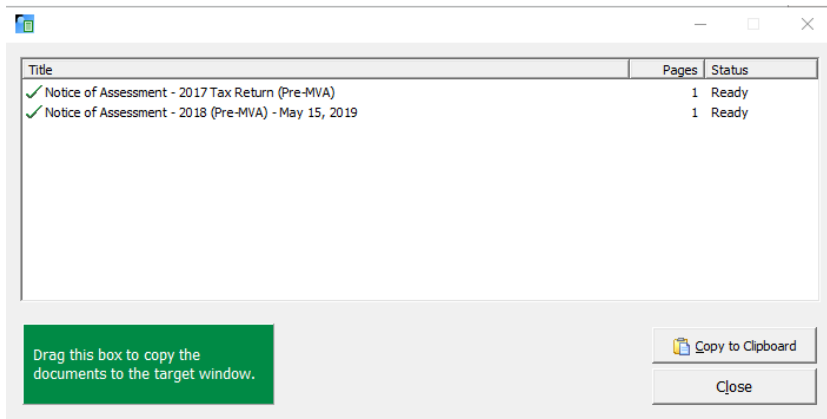
7. Confirm your upload.

8. Close the *Upload from Primafact* window.

If you are sending very large documents, it may take a moment for your documents to be ready. You can continue working in Primafact as the documents are prepared for sharing.

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[1] Requires a supported browser.

Primafact 6 Team Customizations

Primafact 6 enables more customizable settings for coding, including annotation colors and labels, annotation default form settings, and team flag colors and labels.

Customizing Annotation Color Labels

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

Customizing System Default Annotation Labels

1. In the main Primafact Toolbar, select **_Tools > Setup > Annotation Colors_**.
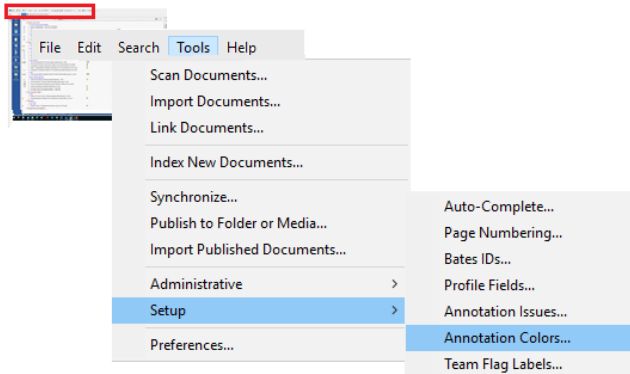
2. The **Annotation Color Labels** window will open**.**

You will see 12 colours. Click **_Show Additional Colors_** to make 6 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.**

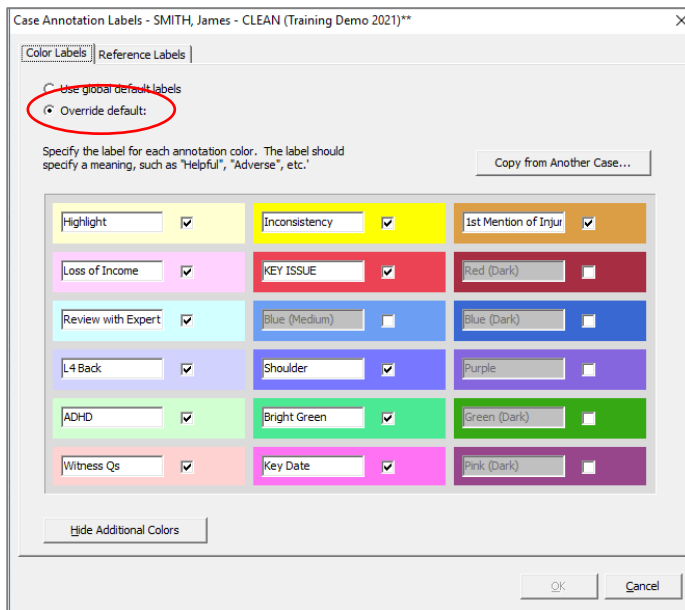Now you have set your Annotation Color system defaults.

Customizing Case Default Annotation 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 *Annotation Labels.*

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

5. Select *Override default*.

6. **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.)

7. Click **OK**.

*Note you can copy values from another Case by clicking **Copy from Another Case** button, selecting the desired Case and clicking OK, then Yes to confirm. After the Case values have been copied, you can continue to customize your current Case labels as desired.*

Annotation Form Customization (Event Time)

To add or remove the Event Time field from the Annotations forms on a Case, click the **Gear** icon at the far right of the blue Case Ribbon and select **Annotation Colors.** Select the **Annotation Fields** tab. Select or de-select the "**Event Time**" checkbox and click **"OK."**
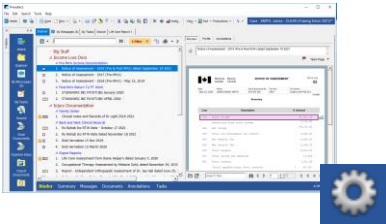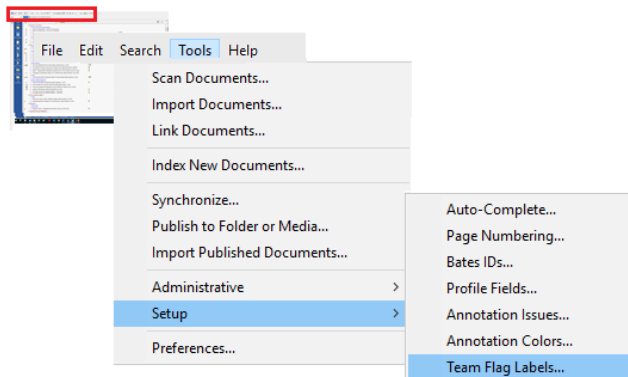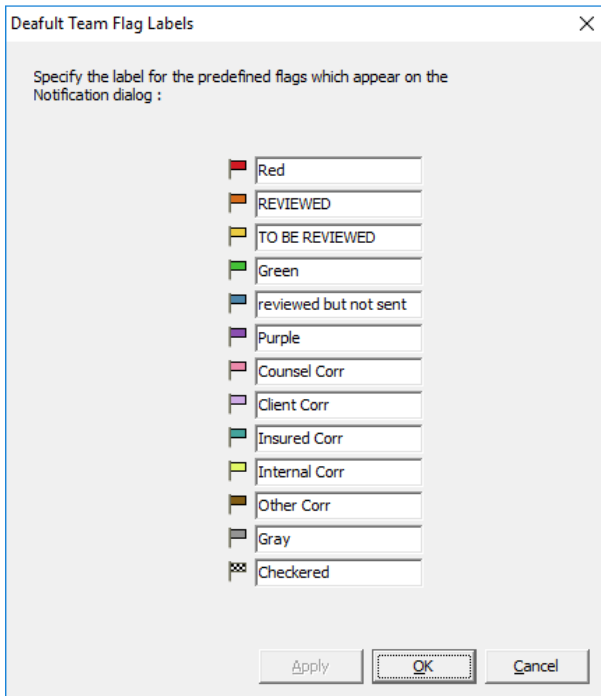

Customizing Team Flags

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

Customizing System Default Team Flag Labels

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

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.

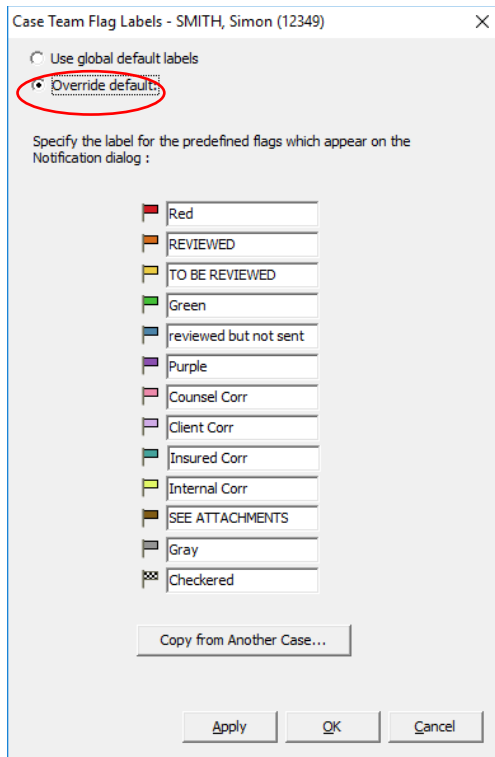## Customizing Case Default Team Flag Labels

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 Flag Labels**

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

5. Select ***Override default***.
6. Enter the desired label in the field to the right of your flag. This will overwrite the system default.
7. Select **OK** to save.

Note: To copy values from another Case, click the **Copy from Another Case** *button, selecting the desired Case and clicking OK, then Yes to confirm. After the Case values have been copied, you can continue to customize your current Case labels as desired.*

System-Wide Annotation Form Default Settings

You can now customize default annotation values. An example would be opening Annotations to a different colour than yellow. Setting annotation defaults can be done at the system level (globally, for all users), and at the Case level (for all users while using that that Case).
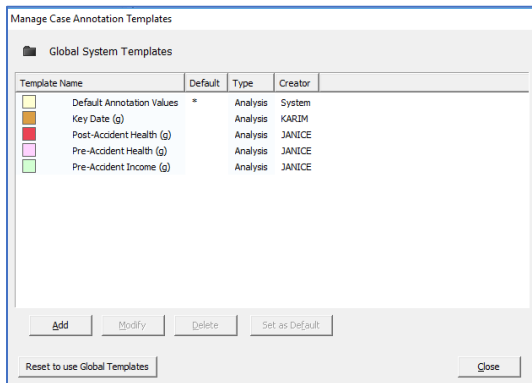
Adjusting Annotation Defaults – Global Settings:

1. To change your firm's global setting, go to

Tools > Setup > Annotation Templates
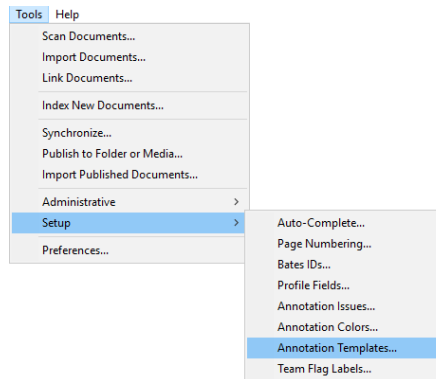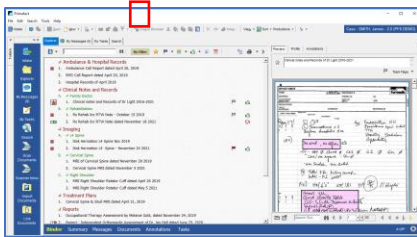
2. The Manage Case Annotation Templates dialog will open.
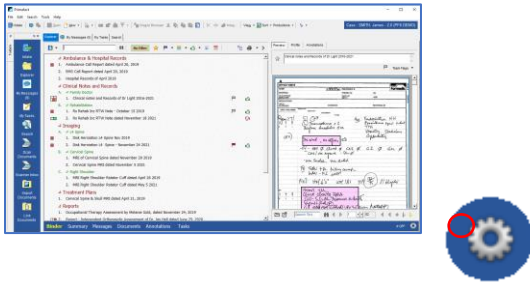

3. Select Default Annotation Values.
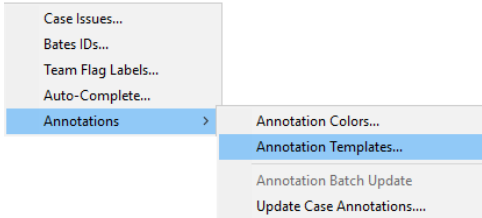
Adjusting Annotation Defaults – Case Settings:

You can set default values for individual Cases, overriding global annotation defaults and annotation templates for that Case.
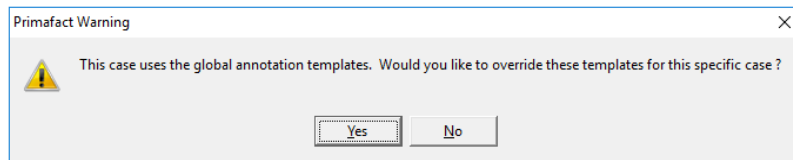
To change default annotation settings for a Case:

4. Click on the gear icon at the right-corner of the Case ribbon:

5. Click Annotations > Annotation Templates on the drop-down menu:

6. If you have not activated Case-level templates, the template override warning will appear. If you click "Yes" the Case Templates will disconnect from the Global templates[2].
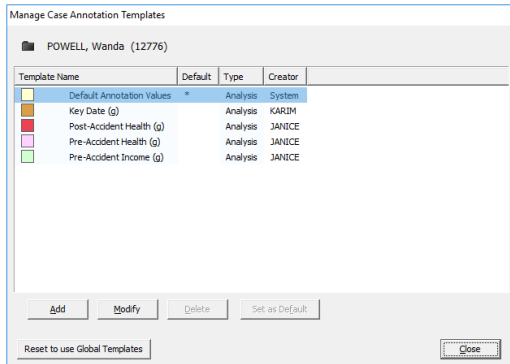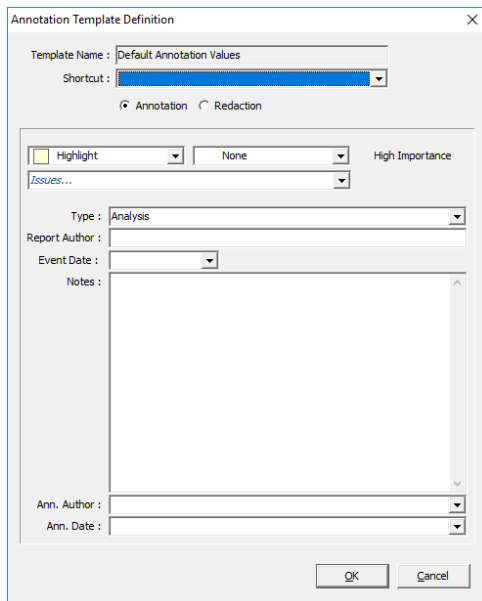

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[2] You can reset back to Global templates but will lose any Case template customizations. (Any existing annotations made using the Case template settings will be preserved.)

7. The Manage Case Annotation Templates dialog will appear. Select Default Annotation Values and click the Modify button.
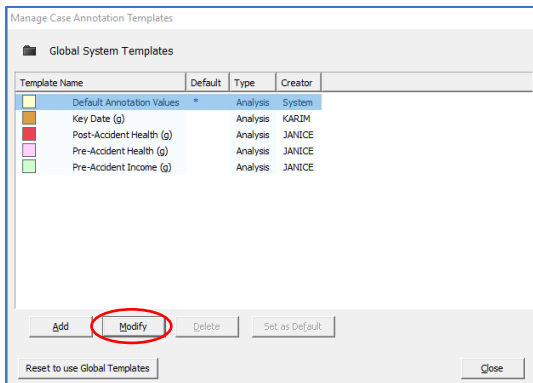

8. The Annotation Template Definition will open.

9. Set your field preferences and click OK. This works similarly to the settings for the global default annotation values, except you have the added option of adding *Issues* to the default Case annotation settings.

10. Your default annotations will open at the set values for this specific Case.

11. Click Modify.

12. The Annotation Template Definition will open.
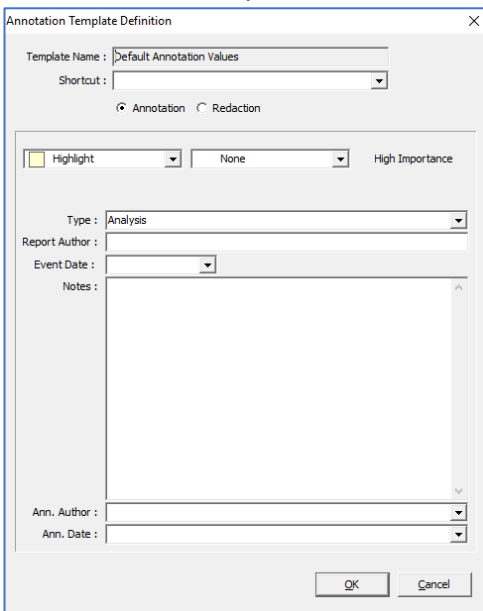
13. Set your field preferences and click OK.

14. Your default annotations will open at the set values, unless you have set a different annotation for specific Cases.

Technical Support

Thank you for participating in the Primafact 6 Beta. We appreciate your time and feedback!

If you experience any bugs in the program please contact Primafact Support at support@primafact.com or 416-531-1891. The support desk is available from 9am-5pm ET Monday-Friday.