primafact

Working with Primafact 6

User Guide

www.primafact.com

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Contents

Introduction

Primafact 6 takes case development to the next level. Primafact is designed to support more efficient document review and case preparation.

Primafact provides several main benefits to litigation teams:

1. Improved efficiency in managing litigation documents
2. Superior access to case documents & review notes
3. Flexible review & reporting options

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

Why Primafact?

- ✓ Better document access with all documents related to a matter organized in one central location
- ✓ User-determined document positioning in Binder view, for controlled case narratives
- ✓ Search for a document electronically, no more misplaced documents or files
- ✓ Immediate access to all files in a case
- ✓ Detailed document markup and redaction
- ✓ Pinpoint annotations case-wide
- ✓ Effective case preparation and review
- ✓ Efficient production preparation and export

New in Primafact 6

Primafact 6 includes a number of new features, as well as enhancements to features available in previous versions. 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.

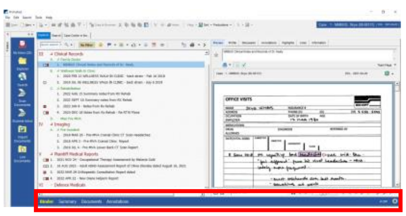
Getting Around Primafact

Cases

Primafact supports documents management by "Case", which is visually identified as a black folder icon. Supported with standardized but customizable binders/folders a Case includes coding and review features that make it easy to manage documents and associated markup for efficient ream review as Cases progress.

Case Navigation Ribbon

This blue ribbon, found at the bottom of the Case Binder and Case List Views, provides access to key Case views, along with Binder Page Numbering and Case Customization options accessed via the Gear menu.



Accessing the Case Navigation Ribbon

The Case Navigation Ribbon is only available on folders set up as Cases (identified as Black Folders in Primafact) – if your matters are set up in a regular yellow folder, you will not be able to access Case features, including the Case Navigation Ribbon.

To access the Case Navigation Ribbon, click on any Case Binder. You will see the blue Case Navigation Ribbon at the bottom of the binder view. This ribbon is also visible using the **Summary**, **Documents** and **Annotations** screens. The Case Navigation Ribbon is not available when viewing Case Content in a folder list view.

Binder View

The Binder is a unit for grouping documents in Primafact Cases. The Binder View allows documents to be positioned in a discretionary order, as determined by members of the team.

Clicking on a Binder  displays the “Binder View” for that Binder. The Binder View also includes the blue binder navigation ribbon at the bottom of the screen, which allows users to access other Views, including the Case Summary screen, Annotation List, and Documents Views. These views can only be accessed from within the Binder View.

The order of documents displayed in the Binder View is common to all users – this means that if a document is moved by one user, it is seen in that same binder location by all users. However, the Binder can be customized (numbering preferences, icon display preferences) at the user level, with selections not impacting other users.

Binder Tabs and Sections

Binders are subdivided into Tabs and sections for more detailed document organization and easier navigation. The Tab is the highest level of binder organization, and each Tab can be divided into sections and subsections.

Binder Collapse/Expand

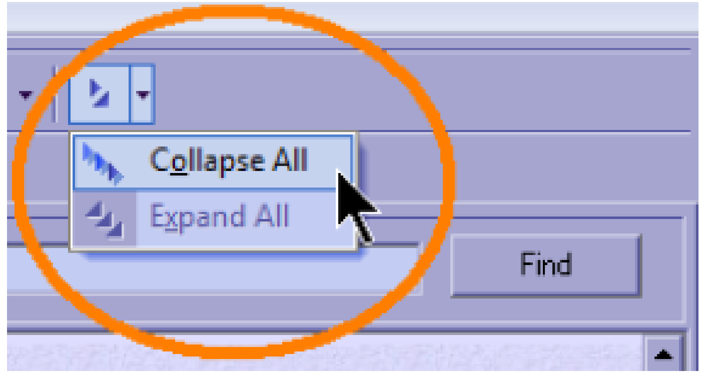
You can collapse binder tabs and sections to more easily navigate binders. **Collapsing and Expanding Applies Only to You:** Unlike binder sorting, which impacts all users, collapsing and expanding tabs and sections only affects your view of the binder.

A collapsed Tab/Section is indicated by this symbol (in the red circles)

An expanded Tab/Section is indicated by this symbol (in the blue circles)

1. Open a binder.

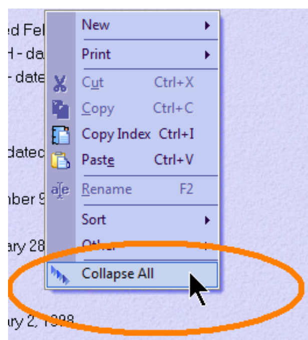
2. Click on the Collapse/Expand toolbar icon and select "Collapse All" or "Collapse" just the tab/section you have highlighted.



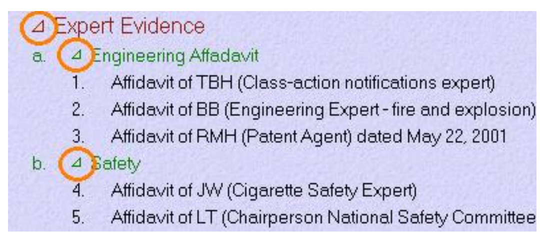
3. Click on the Collapse/Expand toolbar icon and select "Expand All" or just the tab you have highlighted.

You can also expand and collapse by:

- Right-clicking anywhere in the binder and select Collapse All from the context menu.



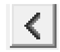
- Left-clicking on the expand/collapse triangle beside a tab/section:



- Double-clicking on an collapsed tab/section heading will expand it.
- Double-clicking on an expanded tab/section heading will collapse it.

Document Preview

The document preview makes it easier to identify documents in binders and on lists, by displaying the selected document on a single screen.

To display the document preview pane, click the  button at the far-right of the filter row near the top of any Binder or List View.

To preview a document, simply click on any document title in your binder index to display the first page of the document.

To close the document preview pane, click the  button to the right of the quick search panel above the binder index.

Opening a Document from the Preview Pane

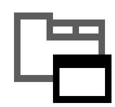
You can read and do most review tasks using the Preview Pane, but in some cases users need to review an open document.

To open a document from the Preview Pane, right-click on the preview pane and select **Open Document in Tab.** Alternatively, you may click the document icon on the ribbon located at the bottom left of the preview pane. You can also double-click on the document name in the binder.

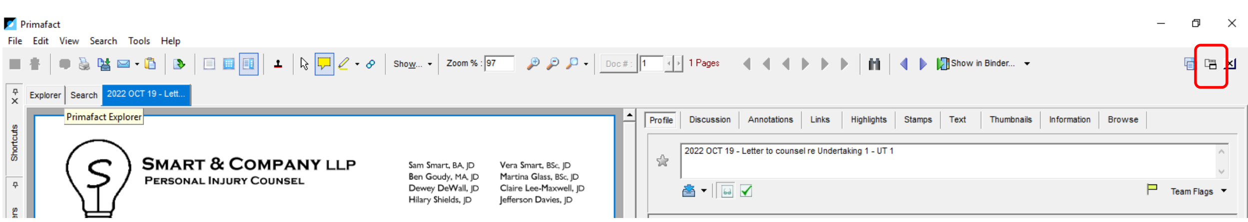
You can open the document in a new window (Detachable Document Window) by clicking on the New Window button in the lower left corner of the preview pane, if you prefer.

Detachable Document Windows

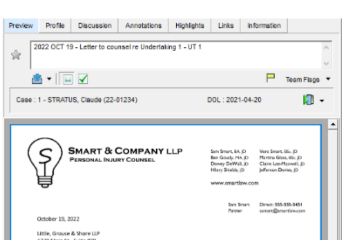
Viewing a document in its own window (detachable document window) makes it easier to view and work on more than one document simultaneously in Primafact. All features available for a document opened in its own tab are available in this new window.

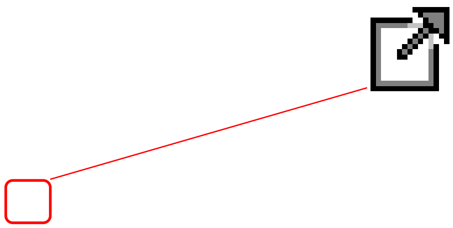
You can open the document in a new window by clicking on the New Window button in the lower left corner of the preview pane. If viewing a document in a Tab, you can switch to a detachable window by clicking on the new window button at the top-right of the Primafact Toolbar. 

Open from Primafact Document opened in Tab:

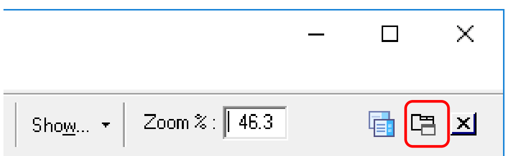


Open from Preview Pane:





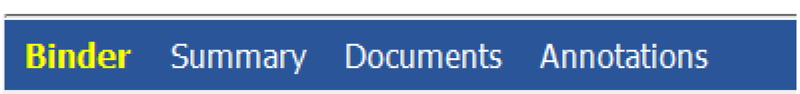
To restore the document to the main Primafact window, click the "**Restore Window**" button in the top right of the toolbar

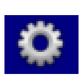


This will return the document to a tab in the main Primafact window.

Case Navigation Ribbon

The new case navigation ribbon at the bottom of the Binder View of any Case Binder gives quick access to the Case Summary Document List, and Annotations List.





The gear icon at the far right of the case navigation ribbon allows you to manage Case Issues, Bates IDs and AutoCompletes.

Document List View

In addition to viewing your document sets in the familiar binder index format, the **Document List** view gives you additional ways to sort and view document sets.

The Document List view displays documents in listed orders that can be changed on-demand, by filtering the document selection, or ordering documents by selected fields chosen by the user, or by using Saved Views. Documents may be displayed by Binder or by the entire Case.

Accessing the List View

You can access the Document List view by selecting the **Documents** option on the bottom blue navigation ribbon.

List View Features

The **List** view displays documents in listed orders that can be changed on-demand, by simply filtering the document selection, or ordering documents by selected fields chosen by the user. Documents may be displayed by Binder or by the entire Case.

Filtering the List View

Applying filters to the List View helps you quickly locate specific documents. Using the **Quick Filter** identifies only those documents containing the filtered term in any of the displayed fields (that are visible on your screen. For example, typing a doctor's name into the Quick Filter will limit the displayed documents to that doctor's records, allowing you to quickly identify the document you are looking for.

You'll see the number of documents meeting the filter criteria identified in the lower-right corner of the list pane.

To sort your list by different criteria, simply select the chosen header item on the top of the list to sort in ascending or descending order.

Document Preview in List View

As with the Analysis View, the **List** view offers the option of a Preview Pane to view any selected document, or the Profile Fields of any selected Document.

To display the preview pane, select the **chevron icon** to the right of the filter bar. 

Your selected document will be displayed at the right of the screen.

Profile Preview

To view the document's Profile Fields, select the **Profile** tab in the Preview window. The **Discussion** tab will display comments associated with the document.

Adjusting List Views

Primafact has list view options for

- Folders displayed on the Explorer tab (includes clicking on a Tab, Section or Subsection in any Binder)
- Case Documents
- Case Annotations
- Inboxes

Exporting Document Lists

To Export Lists see *Exporting Annotation Lists & Reports*.

Favorites

Favorites allow you to identify documents that you refer to frequently, for ease of access. You can filter to favorites by clicking the icon from any Binder or List View.

Creating Favorites

To apply the Favorite tag to a document:

1. Using the Preview or Profile Tab, click the greyed-out icon to apply the Favorites tag.

Removing Favorites

To remove a Favorite tag:

1. Using the Preview or Profile Tab, click the icon to remove the Favorites tag.

Setting your Personal Viewing Preferences

About Viewing Preferences

You can customize a number of personal viewing preferences for Primafact, which do not impact other viewers. Customizable preferences include overall Preferences, Binder View settings, and List View settings for Primafact Inboxes and other Primafact Lists.

Personal System Preferences

To set your personal Primafact preferences:

1. On the Explorer Tab, go to the main Toolbar menu
2. Select **Tools** → **Preferences**
3. Select your desired options
4. Click **OK** when complete

These preferences affect your viewing only. Other users are unaffected by your selected preferences.

Customizing your Binder View

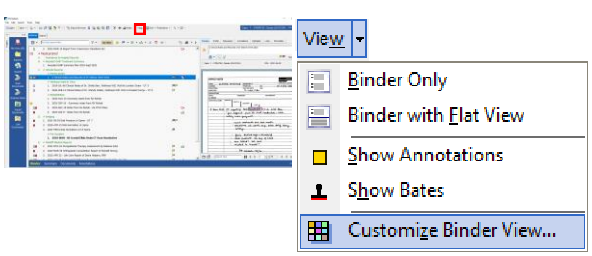
You can customize elements of your binder view, including the color of tabs and sections, displayed icons, as well as your numbering preferences.

Binder Customizations affect your view only – other users are unaffected by changes you make to numbering style (*e.g.* ***A B C*** *vs. 1.2.3.* numbering). (We do recommend that team members adopt a numbering standard for all users).

Note that the <u>order</u> in which documents are displayed in Binder view is universal to all users.

To Customize your Binder View:

1. In the Binder View, on the top tool bar select **View**
2. Select **Customize Binder View**



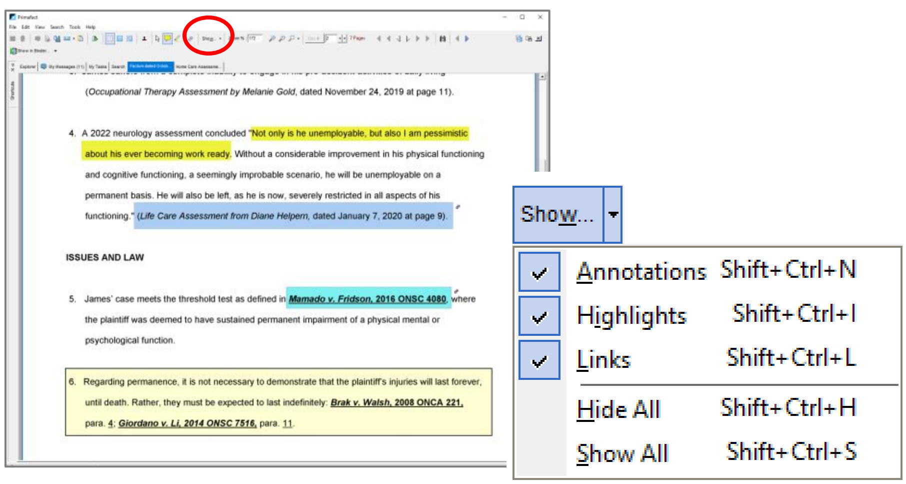
3. Once your customizations have been selected, click **OK**.

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.

Hidden markup will be hidden on all open Primafact documents (open on a Tab or separate Window) until you change Show/Hide settings.

NOTE: Markup is not hidden in document preview.

Search Tools

How Text Searches work

Primafact allows you to search scanned documents by converting the document content into searchable text using Optical Character Recognition (OCR) and mapping the results to the scanned page image. **Handwriting is not converted to searchable text**. Primafact supports full-text searching of scanned, printed to Primafact and imported documents as well as linked Word and Excel files.

Locating document content

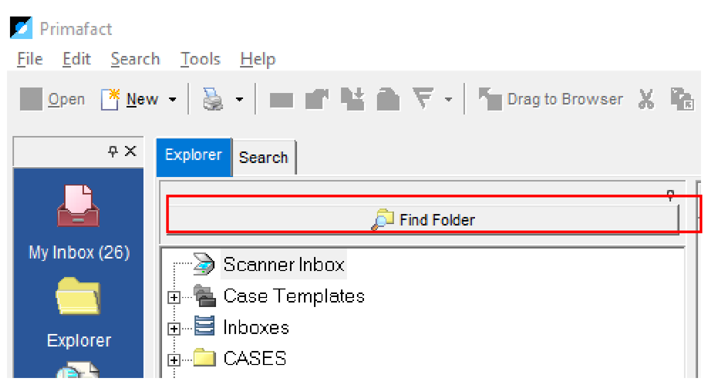
You can locate your document content a number of different ways in Primafact:

- ✓ Binder Search & Filter
- ✓ List View Search & Filter (Inboxes and Document Lists)
- ✓ Quick Search (less powerful alternative to Binder Search & Filter)
- ✓ Searching within a document
- ✓ Using the Search Tab
- ✓ Find Folder

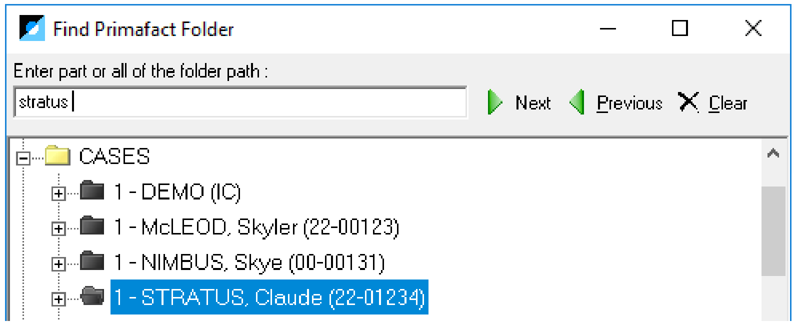
Find Folders

The Find Folder button allows you to navigate quickly to a specific folder, binder, tab or section/subsection. For example, instead of scrolling through hundreds of matter names in a Clients folder, you can use the client name or matter number to go directly to the folder.

1. Click on the Find Folder button at the top of the Explorer window.



2. Type all or part of a folder, binder, tab or section name and press Find, or click Enter on your keyboard. The first match will appear.



3. Click ▶ Next or ◀ Previous to move to the next or previous match.
4. If you are looking for a misplaced folder, you should make sure the Search for folders and binders in the trash checkbox is checked prior to executing the search. If this is checked, matching items from the trash will be shown.

Quick Search/Quick Filter

This is an alternate search option for the Binder view, for users who prefer Binder search options available Primafact 5 and earlier versions of Primafact. Default Binder search settings are more robust and discussed in *Binder Search and Filter*.

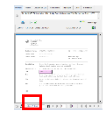
Quick Search Allows you to find document titles in Binder view (Does not search document text, just the titles)

1. The Quick Search (highlights) field at the top of the binder view allows you to quickly jump to documents containing specific text in the title.
2. In the Quick Search field, type part of the title for a document, tab or section. Press the Enter key or the button to commence the search.
3. Click ▶ the or ◀ button to move to the next or previous match.

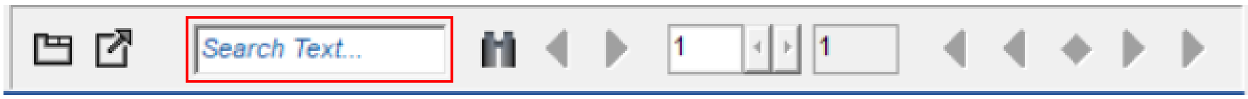
In-Document Searching

Searching within a document allows you to locate specific words or phrases within a selected single document (within an open document or using the Preview Pane).

Search within a document using the Preview Pane:

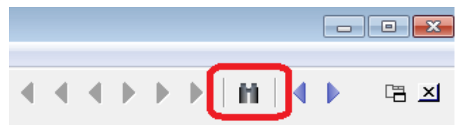


1. Enter your search query in the Search Text box. Note: this search is very literal, and can find only one word or phrase at a time. Searching **within a document does not accommodate quotation marks or wildcards**.

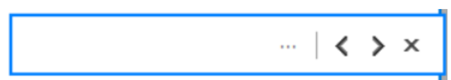


2. Click the binocular icon or press Enter on your keyboard to identify matches.
3. Click the or button to move to the next or previous page containing a match.

Search within an open document (tab or separate window):

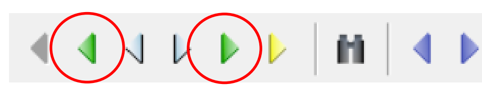


1. Click on the binocular icon in the toolbar.



2. Enter a word or phrase in the text-entry area. Note: this search is very literal, and can find only one word or phrase at a time. **Searching within a document does not accommodate quotation marks or wildcards**.

3. Press Enter on your keyboard



4. The current match will be highlighted in Orange and other matches will be highlighted in bright green. Bright green arrows indicate more matches on other pages on the toolbar indicate matches on other pages of the document.

Using the Search Tab

Global Searching & Selected Folders

Why Use the Search Tab

The search tab is a flexible tool that allows you to search Globally across Primafact, as well as drilling down into selected folders, tabs and sections.

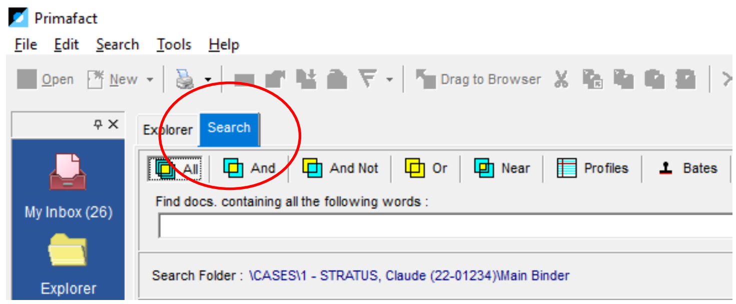
The search tab is the only search tool in Primafact that allows you to search Globally across Cases, and to find content in the Trash and Archives. The search tab is the only tool that permits detailed Boolean searching of Profile Fields across the Primafact database.

By Default, the search tab scope is set to search the currently selected folder (selected in the Explorer Pane). You can search the whole database by selecting "All" folders.

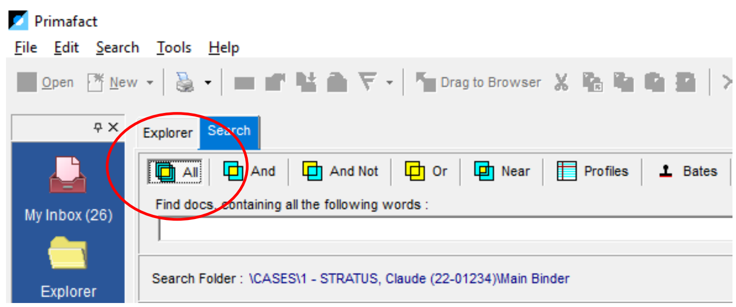
Basic searching

Once you have set the scope for your search (All vs. Current *etc.*)

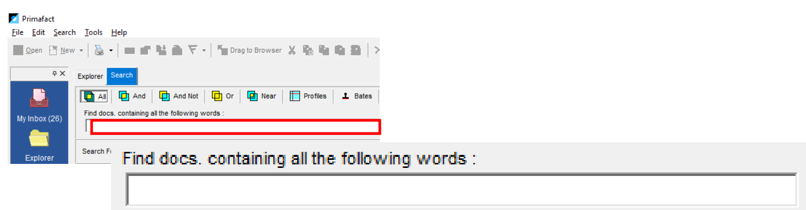
1. Click on the Search tab or the Search shortcut to open the search window.



2. **All** search is the default. This works like a Google search – Primafact will look for documents containing each of the words or phrases you type into the search bar.



3. Enter the word(s) or phrase you wish to locate in the search field (*search terms are **not** case sensitive*).



4. Click the **Search** button or press **Enter**

TIP: Searching for **probable cause** (without quotations) will find all documents which contain both the words "probable" and "cause";

Searching for **“probable cause”** (within quotation marks) will find all documents containing the exact phrase.

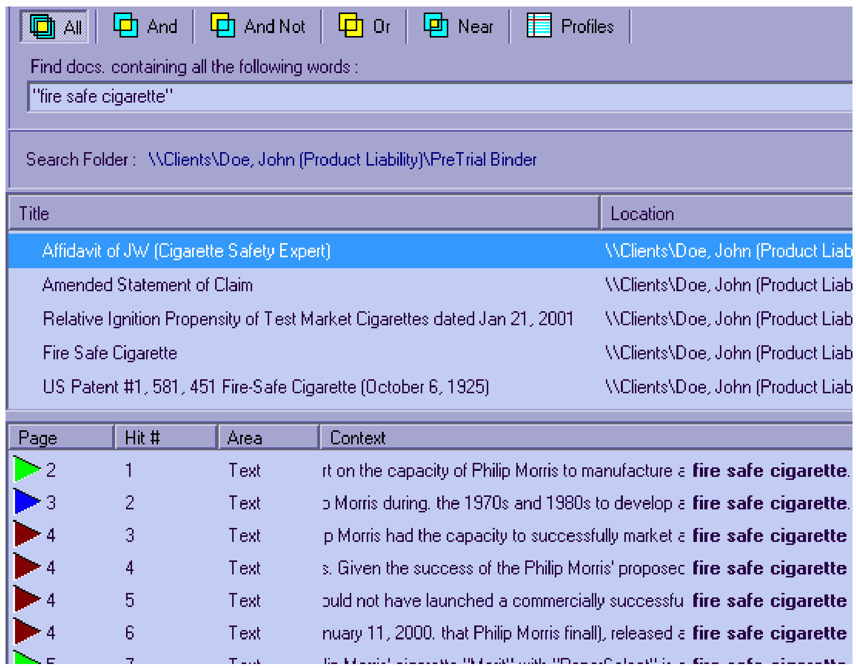
Working with Search Results on the Search Tab

The search results are divided into two parts. The top section displays all the documents which were found; the bottom section shows the matches for the highlighted document.

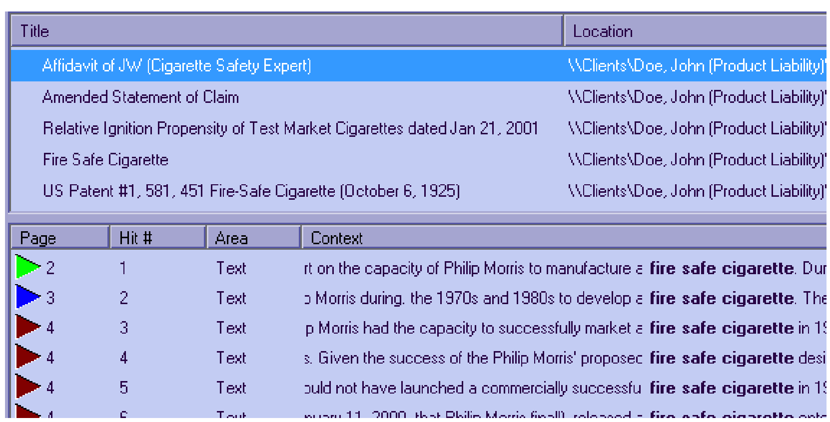
By default, documents are sorted by the number of hits – greatest to least. You can change the sort by clicking on one of the other column headings. For example, clicking on Added will sort the documents from oldest to newest. Clicking on page number will show search results by largest documents.

Documents appear in the top frame. Matches (“hits”) within the highlighted document appear in the bottom frame.

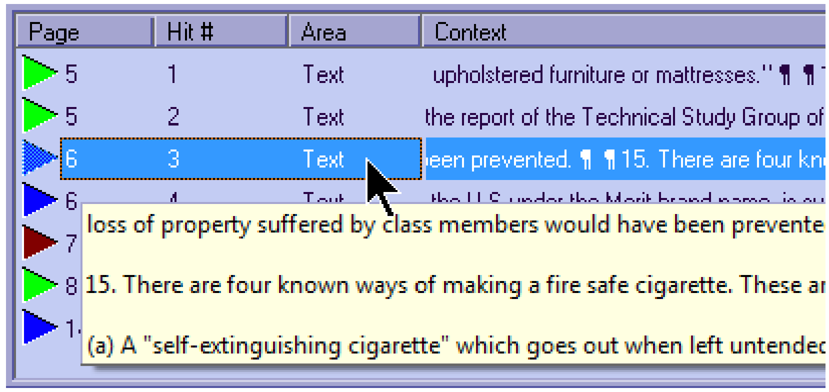
Coloured arrows indicate a page grouping - in this example, there are four hits on page 4.



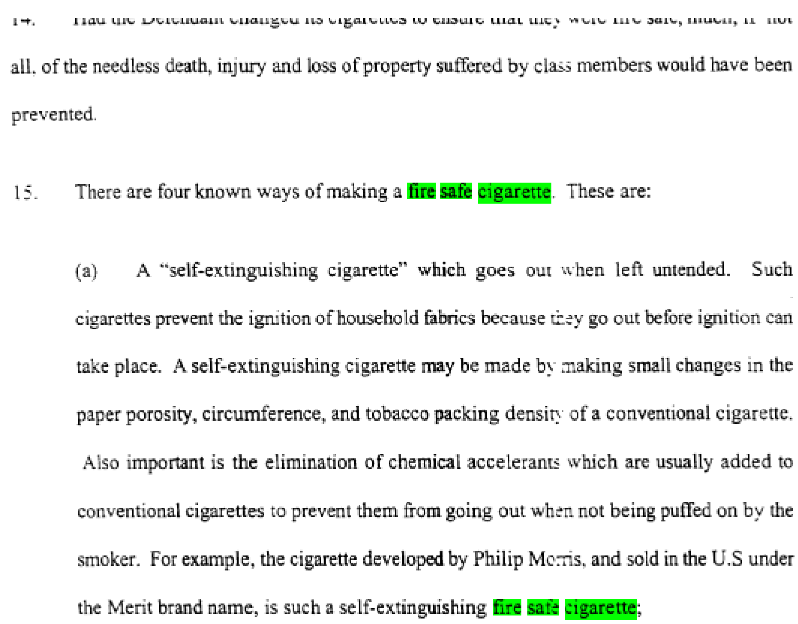
1. Click on a document name in top pane to reveal hits by context in lower pane.



2. To view a hit in context, use your mouse to place the pointer over the hit you wish to review. A yellow dialog will pop up with that hit in its immediate context.



3. Double-click on the selected hit to open the document at the page where the match occurs. Text matching selected search terms is highlighted in green.


all. of the needless death, injury and loss of property suffered by class members would have been prevented.

15. There are four known ways of making a fire safe cigarette. These are:

(a) A "self-extinguishing cigarette" which goes out when left untended. Such cigarettes prevent the ignition of household fabrics because they go out before ignition can take place. A self-extinguishing cigarette may be made by making small changes in the paper porosity, circumference, and tobacco packing density of a conventional cigarette. Also important is the elimination of chemical accelerants which are usually added to conventional cigarettes to prevent them from going out when not being puffed on by the smoker. For example, the cigarette developed by Philip Morris, and sold in the U.S under the Merit brand name, is such a self-extinguishing fire safe cigarette;

Use the Green arrows at the top of the toolbar to advance to the next or previous page containing a search "hit."

***NOTE:* In Normal view, you can use the Browse area to display a list of all documents picked up in your search. Clicking any of the documents will open that document in your Tab – which can be an easier way to review your search results than by going back and forth to the search tab.**

Advanced search options

Using Wild Cards

An asterisk (*) can be used as a "wild card" to replace any number of characters sharing a common root. This is useful when searching for a word that may come in a number of forms, or may have a number of spellings.

NOTE: Your search string is limited to 15 characters plus a wildcard.

Wildcard examples:

- **misrepresent*** will return words beginning with “misrepresent”, such as misrepresentation, misrepresentative, etc. Searching for “misrep” without the wildcard (*) will not find occurrences of the word “misrepresent”.
- ***cause** will return words ending with “cause”, such as cause and because.
- **s*s** will return words starting and ending with the letter “s”, such as statistics, stats, states, etc.

You cannot use the asterisk twice in a word.

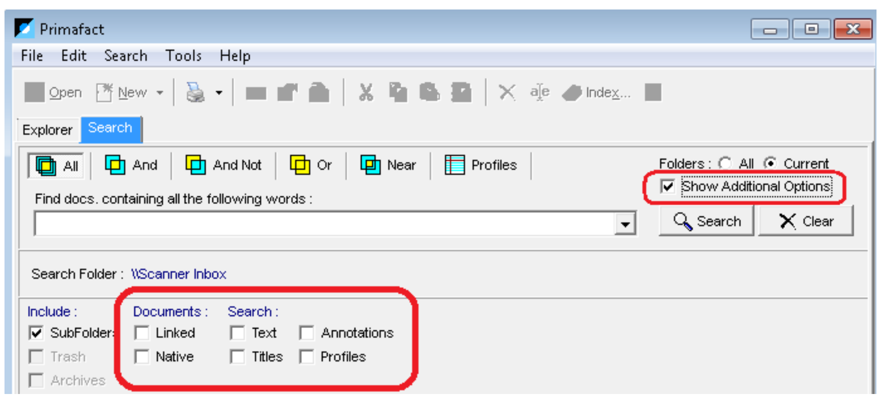
A question mark (?) may be used as a “wild card” to replace a single character in a word. It will replace only one letter at a time, in the exact location within the word. You may use more than one question mark within the same query.

For example:

- **L?W** will find words like **law** and **low**, but not words like lockjaw.
- **SP??E** will find words like **spine** and **space**, but not specialize [sic].

Types of content you can search:

If you check the **Show Additional Options** box, you will have additional options available that will allow you to search for specific content:



Check this:	To Do this:
Text	Find all documents containing the search term(s) anywhere within the document text.
Titles	Find the search term(s) in document titles.
Annotations	Find the search term(s) in the Annotations**.**

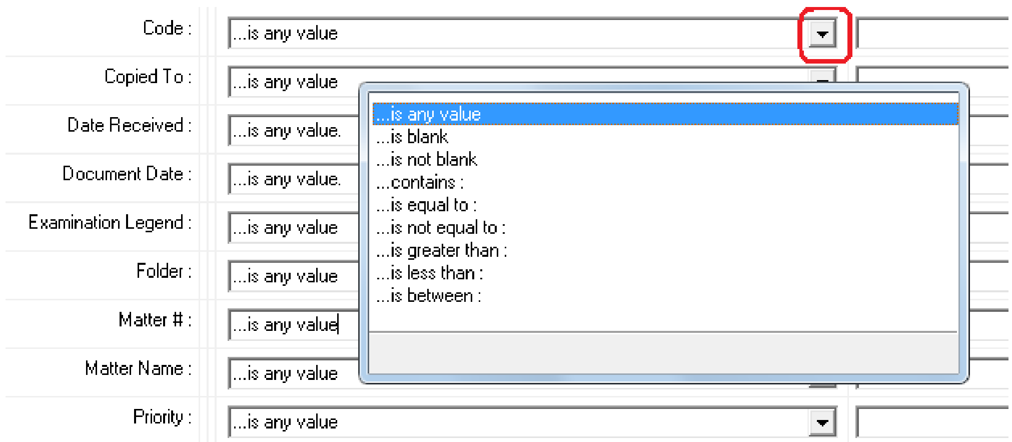
Profile Fields

Find the search term(s) in the document metadata (the profile fields shown at the right when you open a document):

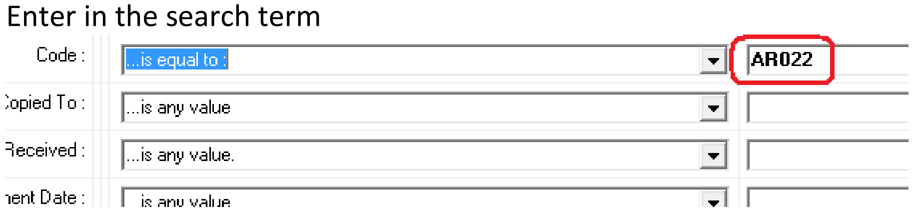
Using the Profiles Tab (on the Search Tab)

1. Select the category you are using when viewing documents (or another one entirely) by clicking on the dropdown button and selecting the appropriate category:

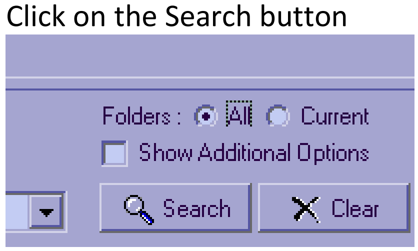
2. Click on the dropdown list beside the category field you wish to search and select the criteria.



3. Enter in the search term



4. Click on the Search button



Text Search Operators (Simplified Boolean Search Commands)

The scope of your searches is also governed by the Boolean connectors you select to create the parameters of your search.

ALL & AND In Primafact, the ALL search is an AND search.

AND restricts the results to documents that contain both phrases. ALL restricts the results to documents that contain ALL of the words or phrases entered (in an ALL search, double quotes are used to define a single phrase).

Documents containing only some of the selected words or phrases will not be identified by these searches.

OR Broader than an AND or ALL search; results include documents containing any of the phrases entered.

AND NOT Restricts results to documents containing the phrase selected EXCLUDING documents containing a particular word or phrase.

NEAR This is also known as proximity searching. Finds documents containing terms located within designated number of words from one another.

For example: If you search for “back” within 8 words of “pain”, then it would be found in a document containing “she complained of back pain” or “patient was exhibiting lower back and hip pain’.

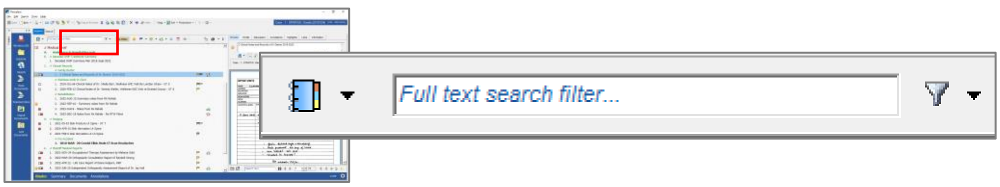
Working with the Binder View

Binder Search and Filter

You can perform full-text document searches directly from your Primafact Binders, to locate specific information located within the 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.



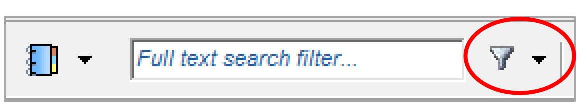
By default, Primafact 6 is set to perform full-text searches, including document titles, page text, annotations and profile fields. To perform a search, click on the search area and type your search query. Click the **Enter** key to perform your search. To adjust search settings, see ***Changing the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

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

Changing the Search Filter Options

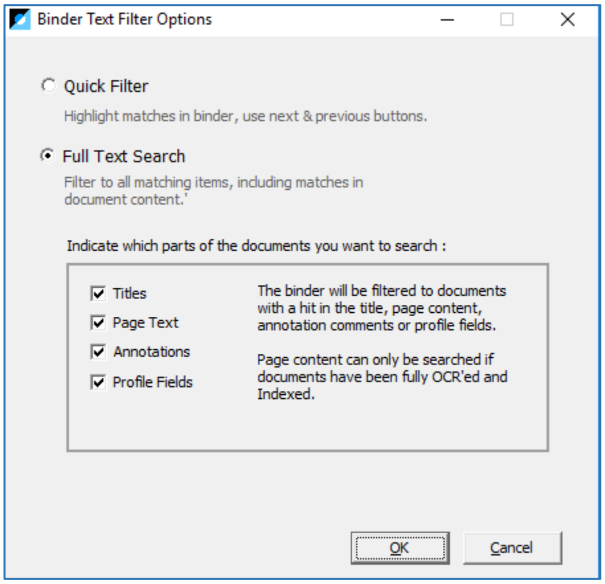
The Binder search bar can be set to perform a ***Quick Search****,* which searches document titles, or ***Full-Text Search****,* which can include content in Titles, Page Text, Annotations and Profile Fields, depending on your selected settings.

1. To adjust your settings, click the filter dropdown to the right of the search bar:



2. Click Search Options.

The Binder Text Filter Options dialog will open:

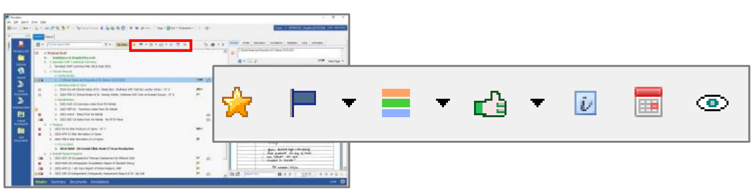


3. Select the Quick Filter button to perform Quick Searches. Select the Full Text Search Button to search for text content within your documents.
4. Selecting or de-selecting the Titles, Page Text, Annotations, and Profile Fields checkboxes will adjust the scope of your Full-Text Search.
5. Click OK 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 for the Binder view 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)

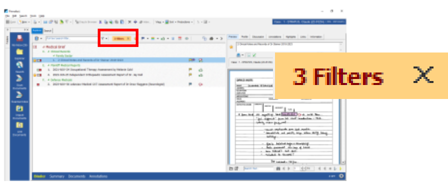
 Annotation Issue

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

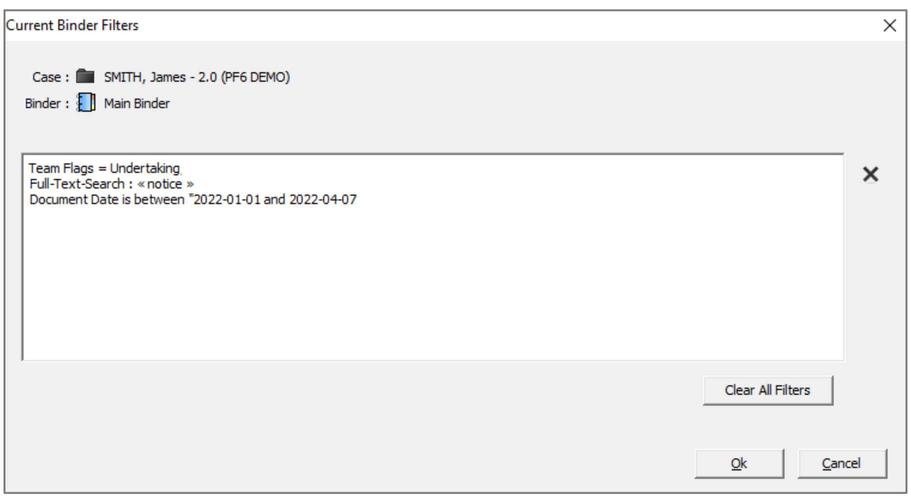
 Unread Documents

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.

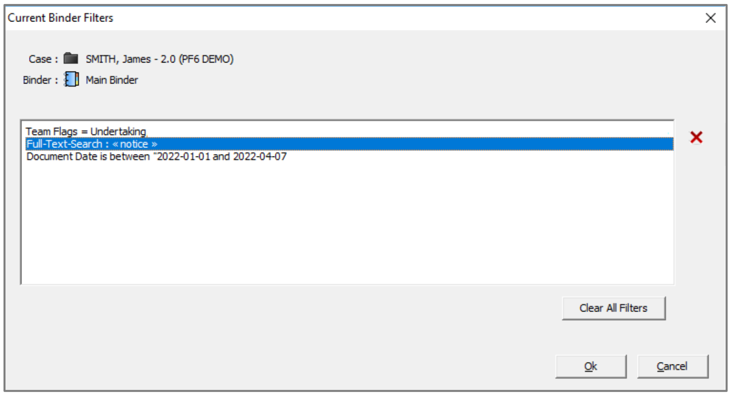
Clearing Filters

4. 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

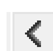
1. To selectively clear filters, click on the yellow **Filters** button. The **Current Binder Filters** window will open.

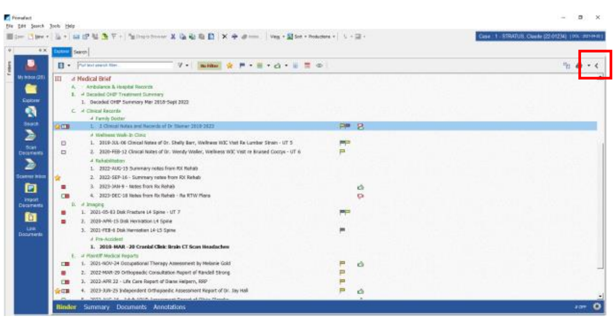


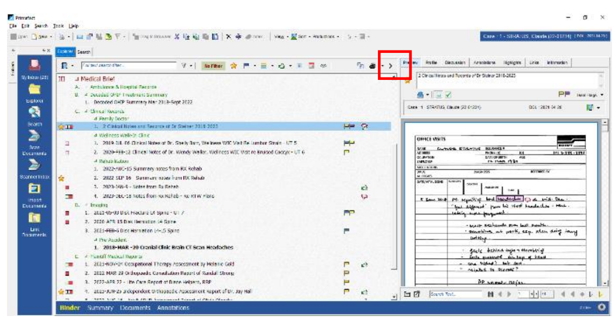
2. Select the filter you want to remove and click the red **X** button.
3. Repeat as desired.
4. When finished click **OK**.

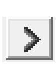
Document Preview

The document preview makes it easier to identify documents in binders and on lists, by displaying the selected document on a single screen.

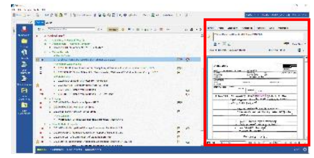
If the preview pane is not displayed click the  button at the far-right of the filter row near the top of any Binder to display the preview.



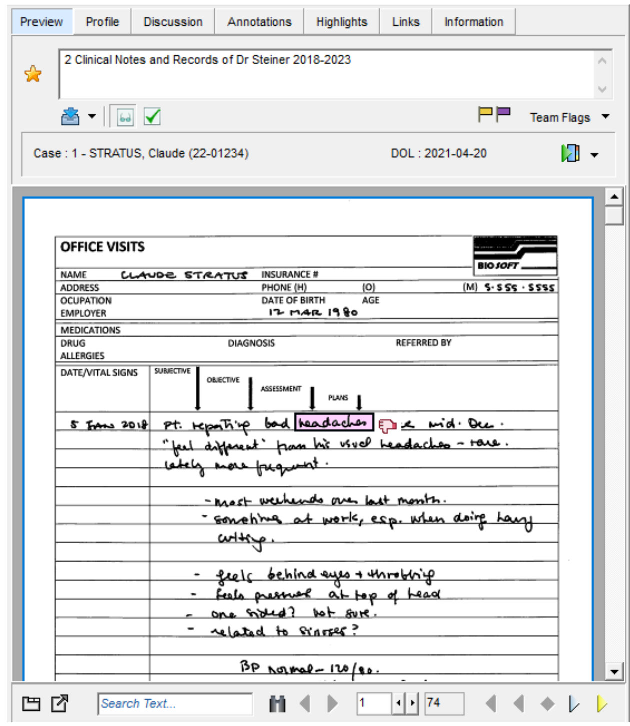


Clicking the  button to the right of the quick search panel above the binder index will hide the document.

Document Preview Tabs



The Preview area has several tabs that display additional information about the previewed document.



- ***Preview Tab*** – Displays selected document
- ***Profile Tab*** – Displays associated document profile information
- ***Discussion*** – Displays document discussion history
- ***Annotation Tab*** – Displays document information on a searchable, filterable list
- ***Highlights Tab*** – Shows highlighted text & connects to associated pages
- ***Links Tab*** – Shows hyperlinks added to a document, notes and link address
- ***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.

Organizing Binders

Primafact binders are designed to permit flexible positioning of Tabs, Sections and Documents. Unless Auto-Sorting has been applied, simply click and drag to move documents to their desired position.

Sorting Binders

Set Binders to Auto-Sort

One of Primafact's most powerful features is that it lets you organize your documents very flexibly, by positioning documents exactly where you want them. **Note Binder order is Global – all users will see all documents displayed in the same order when they are in Binder View.** However, if you prefer, you can set binders to automatically sort incoming documents by one of the following three categories:

- ✓ Document Date (provided the document has been assigned a date)
- ✓ Document Title
- ✓ Date Document was added to Primafact

This can be quite helpful for document types such as correspondence, which are typically organized in chronological order, by date sent/received. However, auto-sorting may not be appropriate for other file types, which might be organized by issue, for example.

Auto-sorting works only at the binder level (you cannot auto-sort individual tabs or sections). Accordingly, if you have some types of documents that are auto-sorted (such as correspondence), we often recommend setting up a separate binder. This can make it much quicker to file documents sent to those binders.

You cannot manually reposition documents in any binder set to Auto-Sort, unless positioning documents with the same Sort value (e.g. same Document Date). If you are not happy with auto-sorting the binder, you can turn Auto-Sorting off at any time.

Discretionary Document Sorting

You can sort documents by the above categories at the Binder, Tab, and deeper levels at any time by manually initiating a sort.

Sorting re-orders your documents within each tab/section/subsection (documents will not move to different tab or section locations during a sort). Individual documents can be repositioned manually after the sort.

Note: You cannot "UNDO" a sort. (This means you can't revert your documents to their pre-sort order using the UNDO button; you can re-sort or manually re-order documents after applying a sort.)

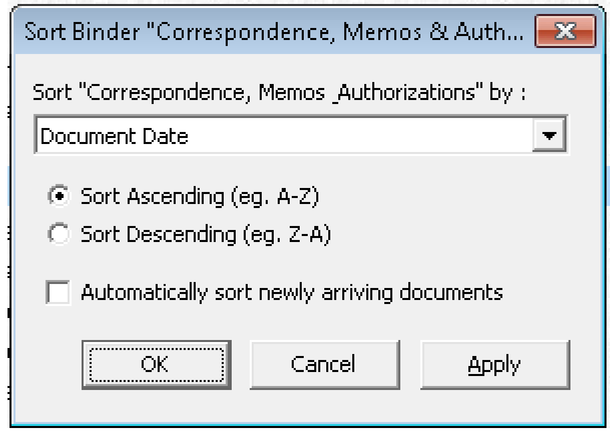
Sorting a binder:

You can sort using any of the three options in ascending or descending order.

1. Select the Tab or section you wish to sort. (This is not necessary if you are sorting the entire binder.)
2. Click on the **Sort** icon in the menu bar. (Alternatively, you can sort by right-clicking in the Binder and selecting **Sort** followed by the desired option.)
3. Select the level (Binder/Tab/Section) you wish to sort.

4. In the sort window, choose the sort category, in ascending or descending order.

   If sorting by date, undated documents will be displayed at the top (if "Sort Ascending" is selected), otherwise, they will appear at the bottom (if "Sort Descending" is selected).



5. If desired, you can select the **Automatically sort newly arriving documents checkbox** to have inbound documents automatically land in the sort order as they arrive in the binder (***NOTE:*** this option is available to entire binders only, and not to individual tabs or sections).

Managing Documents

Importing New Documents

Files can be imported to Primafact via Drag & Drop, or by right-clicking on any Binder, Tab, Section or Folder and selecting **New > Import** and navigating to the source document location.

You can Drag & Drop emails from Outlook, and can import attachments directly from emails.

Once Imported, a document is considered a “native” Primafact document, which is stored in the Primafact database and supports document coding, including annotations, Team Flags, and Profile field coding.

Primafact will import the following file types as “native” Primafact documents:

- **Word**
- **PDF**
- **msg**
- **JPG**
- **TIF**
- **BMP**

If your firm scans using high-end multifunction copiers attached directly to the network, this typically will “push” scanned documents to a server hard drive location. These files can be imported to Primafact using the import function. The import function also allows you to add documents provided on CD or DVD media from third parties.

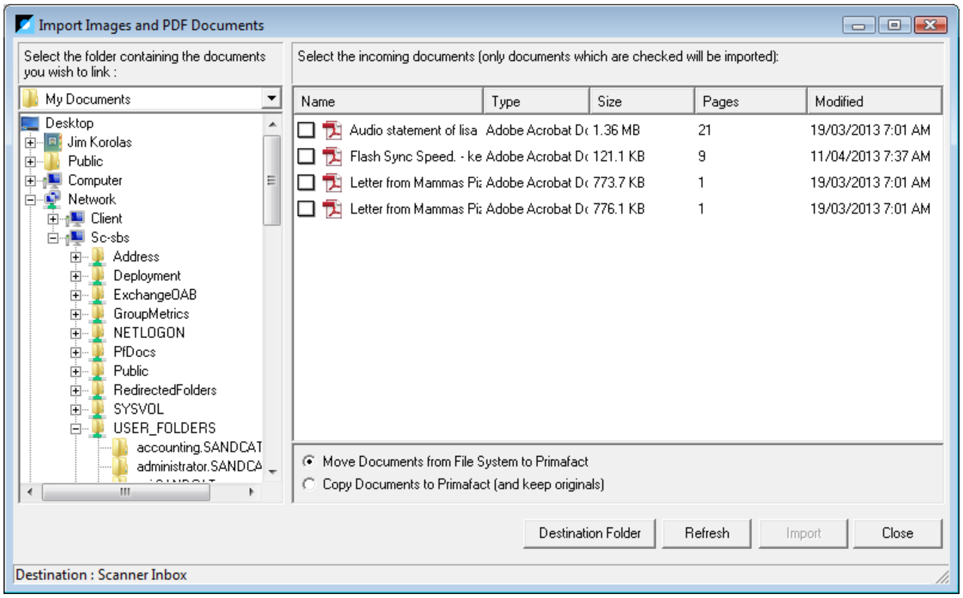
Drag & Drop Import

1. Select the desired tab or section destination in Primafact.
2. Drag & Drop from the source location to the desired Primafact location

Import Documents Menu

1. Select the desired tab or section destination in Primafact.
2. Right-click and select **New → Import**)
3. (Alternatively, click on **Tools** -> **Import Documents**)

   You will be presented with the Import Documents window below. It is divided into two parts: the left shows the folders in the file system; the right shows the documents in the currently highlighted folder:



4. Select the files you want to import by checking each selected document (or by right clicking and choosing **Select All**).

5. The bottom left of the window shows the location in Primafact where the checked documents will be imported.

6. This usually defaults to **Scanner Inbox**. A different Primafact folder can be specified by clicking the **Destination Folder** button. Doing so will display the **Select Primafact Folder** window, where you can navigate to the desired Primafact location.

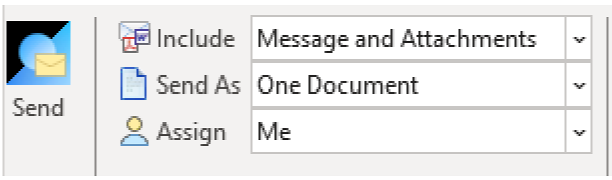
7. The selected documents can be ***moved*** or ***copied*** into Primafact.
   a. When **COPY** is chosen, it will leave the selected documents on the network folder location, these “source” documents will NOT be deleted.
   b. However, when you select **MOVE**, the files in the file system folder will be removed after they have been imported to Primafact. This is to help users with workflow, the assumption being that PDF and Image files represent scanned documents which only exist for the purpose of being imported into Primafact, and once imported they are no longer needed.

If you wish to import native documents into Primafact without removing them from the file system, make sure that Copy Documents to Primafact (and keep originals) is selected.

Importing Email (Outlook Integration)

You can import email and/or supported attachments from Outlook to Primafact by Dragging and Dropping.

The Primafact Plug-In is needed to access the Outlook Integration features, including how to easily control how Outlook email and attachments are imported. (You can select what content to import, and whether email and attachments are imported independently, or merged together as a single email.)



Email Autonaming

Emails imported to Primafact are autonamed, according to a pre-determined format. Attachments imported independently retain the filename of the original attachment.

Supported Attachments

Primafact will import some attachments directly to Primafact. Supported attachments are:

- Word documents
- PDFs
- WordPerfect Documents
- Attached Emails (but not their attachments)

Unsupported Attachments

Certain attachments will not be imported to Primafact. You can bring them in by other methods, such as saving to the network and linking (e.g. video files or Excel document), saving as a PDF and importing (e.g. Excel document that you want to crystallize), or Printing to Primafact.

Unsupported attachments include:

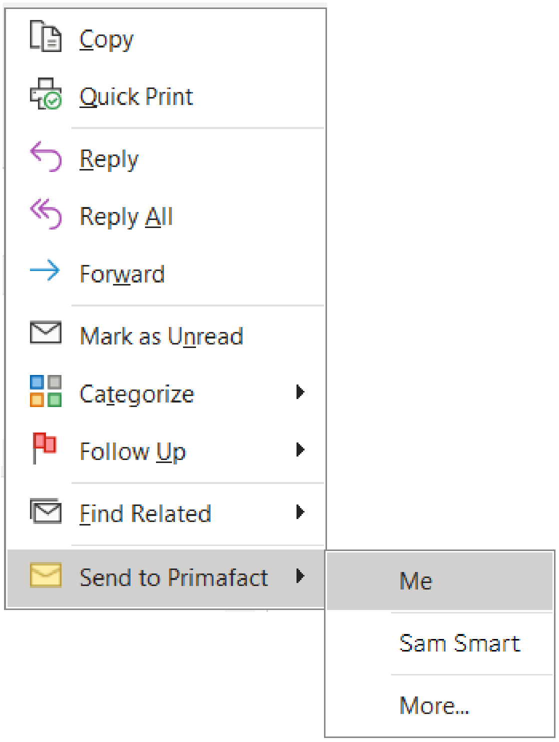
- Excel documents
- Audio/video files such as MP4s
- Attachments to attached emails (open the attachment and import independently)

Send to Primafact from Outlook

This import option allows you to send your email (with or without attachments) directly to someone's **Inbox**. It is a great option when you are delegating your document intake to an assistant.

Send to Primafact using the right-click menu in Outlook :

1. Right-click on the desired email(s) in Outlook.
2. Select **Send to Primafact** from the pop-up menu, then choose the recipient.



3. The email will arrive in the recipient's Inbox.

Drag and Drop from Outlook

You can also import an email by dragging it directly from Outlook into any Primafact binder (Binder View recommended).

Print to Primafact

Print to Primafact saves you from printing and scanning materials that need to be in Primafact. Print to Primafact uses a special print driver that creates a file that you can save in Primafact.

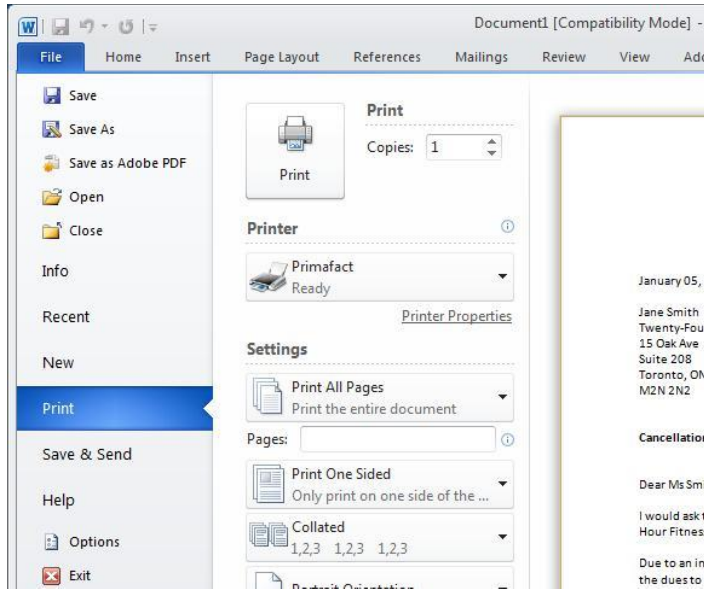
Typically this feature is used with non-TWAIN scanners cannot scan directly to Primafact – selecting the scan to Print option, to direct your document to Primafact.

Documents can be printed directly into Primafact from any Windows application that supports printing (e.g. – Word, WordPerfect, Outlook, or any page on your web browser).

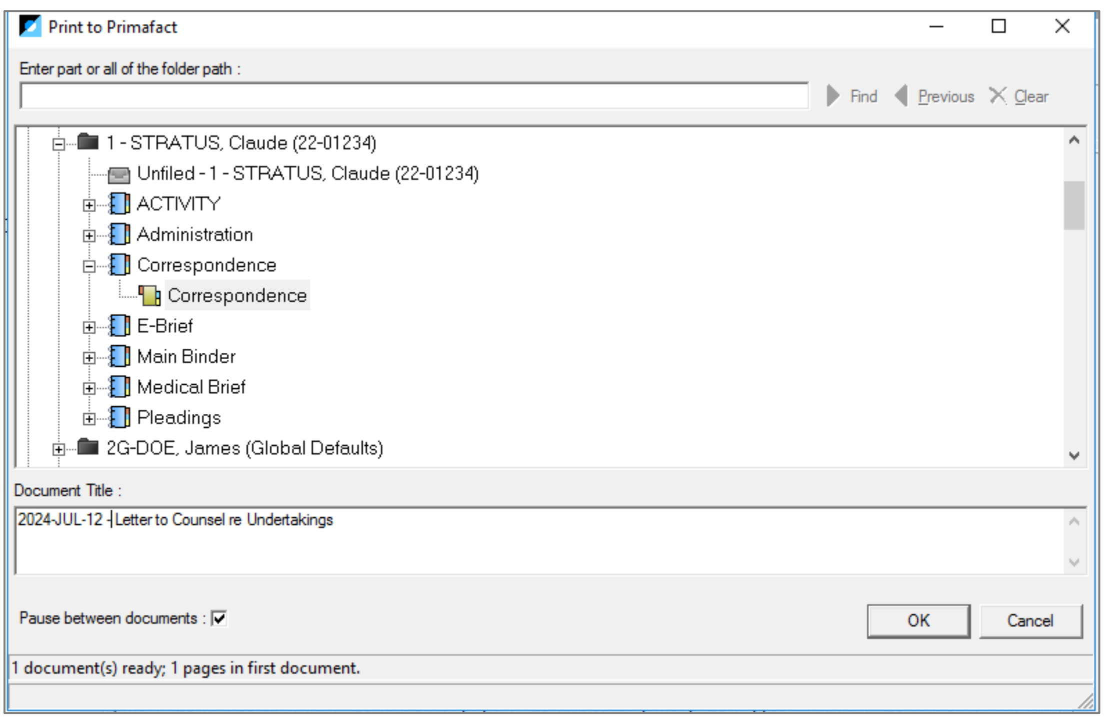
1. From your document (or email, browser window, scanner application etc.:
2. Choose **Print** within Microsoft Word as shown here:

   On the On the Print Dialog, choose **Primafact** from the list of Printers, and in this case, leave all other printing options at their default.

   Click **OK**.



3. Primafact will open a window allowing you to choose a destination within Primafact where the document will be saved as shown on the image below - select the destination folder, and click **OK**:



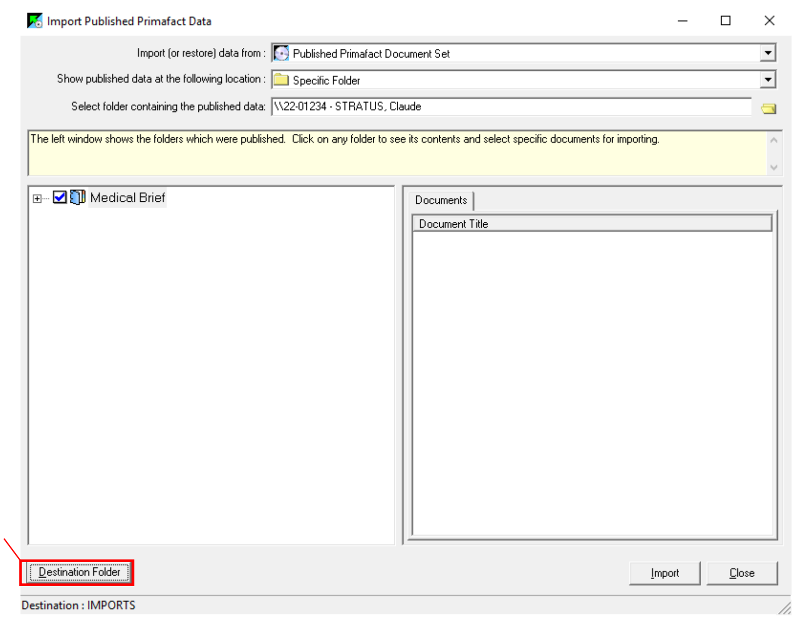
If your document is not already named, you can apply a name using the “Document Title” area shown above.

4. Click **OK** to save the document in Primafact. Click on “Open last Batch of Documents” if you want to see the documents in Primafact.

Importing a Primafact CD (Primafact Publish Import)

You can import Primafact CDs from other firms into your firm’s Primafact and maintain the complete structure as seen on the disc:

1. Set up an **IMPORTS** folder if one has not already been created. You will be importing your documents to this Folder (or another non-Case folder), then moving them to your desired Primafact Case location.
2. Insert the CD/DVD you received from another law firm using Primafact. If you received the file as a link, you will need to unzip the file to import.
3. From the main Primafact menu, select **Tools** > **Import Published Documents**
4. Select the desired folder. (If you wish to preview contents, click a folder on the left to view its documents on the right. Note that for binders, you have to click each individual tab and section - the contents of tabs and sections are not shown when the binder icon is highlighted).



5. Highlight a folder to see its content. Although they will be imported, linked documents are not shown, only scanned and imported documents are shown.
6. Click the **Destination Folder** button at bottom left to select the Primafact folder where the documents should be copied.
7. Make sure any folders you want to import are checked. When you check a folder, all the subfolders are automatically checked as well.
8. Click **Import** to start the process.
9. When complete, a message is displayed indicating the import was successful.

Naming New Documents

Documents in Primafact should be named in a way that makes content clear to a user, and reflects naming that would be appropriate in a Productions Index. Document names in Primafact may differ from the names of documents actually filed with the Courts. *You are responsible for ensuring that documents are named in accordance with the practice directions of the applicable courts where applicable.*

Documents brought into Primafact will retain the name that they were assigned at the time of Scanning, or the name that they acquired in Windows (Word, Outlook emails, file names on CD etc.) You can rename these documents at any time.

Scanning to Primafact – Auto Naming

Scanned documents are automatically numbered in the sequence that they have been scanned, i.e. “New 00000012”. It is helpful to have a document preview displayed as you rename it as this allows you to review the document’s contents as you assign a new name. To rename:

1. Review the document in the preview pane. Locate the page with appropriate name/date information, if necessary.

2. Right-click the document, and select **Rename** and type in the name of your document, or rename in the Document Title area of the Preview tab.

Applying a Document Date

The document date should be included in the document title where possible (adding a date to the Document Date Profile Field enables your document to be sorted and filtered by Date.

You may want to consider aligning the format with Court guidelines. For Primafact to recognize a document date from your document title, ensure that your date format matches Primafact’s recognized date formats below.

If you include a document date using a recognized date format in your document name, Primafact will automatically populate the Document Date field with the date specified in the document name.

Recognized Primafact date formats

Primafact will recognize date formats included in a document title in addition to the examples above. Details on how Primafact’s date triggers work and accepted date formats are listed below.

We recommend adopting team-standardized date formatting for document titles.

Except where the document date appears at the beginning of the document title (where document date is automatically recognized), the document date must be preceded by one of the following to trigger date recognition:

- ✓ dated
- ✓ from
- ✓ on
- ✓ to
- ✓ hyphen preceded and followed by a space ("[name] - [date]")

* **The year must be indicated by 4 digits.**

What if more than one date appears in a document name?

If more than one date keywords is included in a document title and followed by a date, the first date following a recognized date trigger is taken.

e.g Hospital Records from St. Michael's ***from*** January 1, 2019 to May 30, 2021

...the document date is January 1, 2019

Example 2
Hospital Records from St. Michael's January 1, 2019 ***to*** May 30, 2021

...the document date is May 30, 2021

Example 3
January 1 2019 Hospital Records from St. Michael's January 1, 2019 ***to*** May 30, 2021

...the document date is May 30, 2021

Valid Date Formatting Options:

01-JUN-2021

June 1, 2021
JUN 1, 2021
1 Jun 2021
Tuesday, June 1, 2021
Tuesday June 1 2021
2021 Jun 1

06/01/2021*

06.01.2021*
06-01-2021*
2021 06 01*
2021.06.01
2021-06-01

Digits may be separated by any of the following characters: / \ - , ( ) ? ? | { } [ ] ~ . ` space

*** [note in some cases your System may override date formats so that dates above are interpreted as January 6, 2021. Test to confirm date defaults on your system.]**

Document Copy & Duplication

At times you will want multiple copies of the same document in Primafact. **Copy** allows you to position the same document, inclusive of coding, in multiple Primafact locations, for ease of access. **Duplicate** creates a stand-alone clone of your document, inclusive of most coding. Any subsequent changes made to the original document do not impact the duplicate. Any subsequent changes made to the duplicate do not impact the original.

You can also copy or duplicate entire Tabs, Sections and Binders.

Duplication

A few things to keep in mind when duplicating documents:

- ✓ When duplicating a document to the same case, Bates IDs are retained
- ✓ When duplicating a document outside the case, Bates IDs are removed
- ✓ Document Discussions are not included
- ✓ When duplicating a Case folder, all information, including Bates IDs, is duplicated.

To duplicate a document:

1. Right-click on the selected document.
2. Select **Duplicate**.
3. Select the target folder, binder or Case.
4. Right-click and select **Paste**.

Making a Copy of a Document

Essentially copying a document creates a "shortcut", which allows you to access the ***same*** Primafact document from multiple locations. For example, you may create a separate binder with select materials for a motion, while keeping your principal document set intact.

You can only copy a document to other locations in the same Case, or to any non-Case folder, such as an Inbox. You cannot copy a document to another Case.

Any changes you make to any "copy" impacts all "copies" in the database will be copied separately into the binder.

Merging Documents

Merging brings multiple documents together into a single document.

Merging documents is useful where a document is too large to be fed through the scanner at one time, or where a document is assembled incrementally over the lifetime of a file.

To Merge two documents into one:

In the BINDER VIEW[1]

1. Left-click on the document that will comprise the first pages of your merged document. ***The resulting merged document will retain the name, location, profile field content and discussions on this document ONLY*. *Name, location, profile information and discussions on documents merged into this document will be lost.***
2. Press and hold the **CTRL** key and select the next document that you wish to merge into the first.
3. Right-click and select **Merge**
4. Your merged document will appear as the first-clicked document, along with any profile field content and discussions associated with that document. Merged documents appear after the last page of the first-clicked document.

NOTE: Primafact recommends limiting documents 1,500 pages. Longer documents can be split into multiple volumes.

[1] Note document merge order differs when merging documents in a list, rather than in Binder view.

Extracting Documents

Extracting allows you to:

- split a single document into multiple documents, OR
- duplicate selected pages of a document into a separate document

Extracting is useful when you batch scan multiple documents in at the same time, or when you find that a very large document should be broken up into smaller pieces, individually named.

It can also be helpful to create freestanding documents, while keeping an original document intact, such as preserving a complete set of Clinical Notes, along with a separately managed Report that is also part of the Clinical Notes.

To extract pages from a document:

Open the document you want to Extract from. Choose Thumbnail view.

1. Right click and select "**Extract Pages**" from the context menu.
2. The extract dialog will open.
3. Rename the document as desired. If you do not rename, the new document will be named "xx pages extracted from Document Title" (unless you named it in above option).
4. Choose a destination for the extracted document page(s). (If no destination is selected the extracted document page(s) will be placed in the same directory as the source document.
5. Select **Move** or **Copy**:
   a. Select "**Move**" to remove selected pages from the original into a new document. The original will no longer include these pages. This is a "CUT".
   b. Select "**Copy**" to place copies of the pages in a new document. The original document will remain intact. ***Note the Copy will not include annotations, but will include redactions from the original document.***

Document Intake and File Assembly

Scan Settings

When scanning documents into Primafact, we recommend the following settings:

- Black and White
- 300 PPI (this is the minimum setting, do not scan at 200ppi or lower)
- To keep file sizes as small as possible, ***color should only be used for documents that need to be in Primafact in color – i.e. photographs***

I Want To…	Doc Type	Input Type	What it Does	How to Do It	Who Uses It?	When To Use
Scan paper documents directly to Primafact (Dedicated Scanner)	Paper	Direct Scan	Scans document directly into Primafact (no interim placement into Windows or Outlook)	Select **New** > **Scan** and document destination. *Requires Connection to a TWAIN Scanner.*	Typically used by firms with Centralized Scanning workflow Performed by Scanning Clerk	Requires a TWAIN Scanner.
Bring Paper documents into Primafact using a networked scanner	Paper	Scan + Import	Moves/copies scanned documents into Primafact	1. Scan your document to your email ***or*** to a Shared Folder on the Network (Windows Folder). 2. Use the **New** > **Import** menu ***<u>or</u>*** Drag and Drop from Windows, Outlook, select applications.	Firms without a TWAIN scanner Performed by Staff with filing responsibility (Legal Assistant, Law Clerk, or dedicated Scanning Clerk.)	When using a networked scanner.
Bring PDFs or other scanned documents into Primafact	Electronic Documents (PDFs & photos)	Import	Converts files in .PDF, .TIF, .JPG & .BMP to Primafact documents	1. Use the **New** > **Import** menu ***<u>or</u>*** 2. Drag and Drop from Windows, Outlook, select applications.	Users with existing PDF or other supported file types	For these file types: .PDF .TIF .JPG .BMP
Bring an email or Word	Emails Word Docs	Drag & Drop	Converts documents into	Drag & Drop from Windows	Creators of new documents –	For internally-created "final" documents, or Outlook emails.

document into Primafact		**or Print to Primafact**	static Primafact documents	OR Using **File** > **Print** from any printable application (e.g. Outlook, Word, Web Browsers)	eliminates need to print and scan	(Can be used for any document file-type.)
Link regularly updated documents (*e.g.* running memo, Undertakings Chart) to Primafact	**AV files, Documents you want to edit in Word, Excel**	**Linked Document**	Creates shortcuts from Primafact to documents stored on your network Text in linked files can be searched in Primafact Documents remain editable (subject to security settings & permissions)	1. Use the New > Import menu ***or*** 2. Drag and Drop from Windows, Outlook, select applications. ****Note***: *File must be located in a shared server location. File name & location do not automatically update if renamed/moved on server.*	Users who wish to access diverse file types from within Primafact	1. For audio video file types - *e.g.* emergency call recordings, videos 2. For routinely accessed editable documents (*e.g.* Undertakings Charts, Running File Memos)

Understanding Case Templates

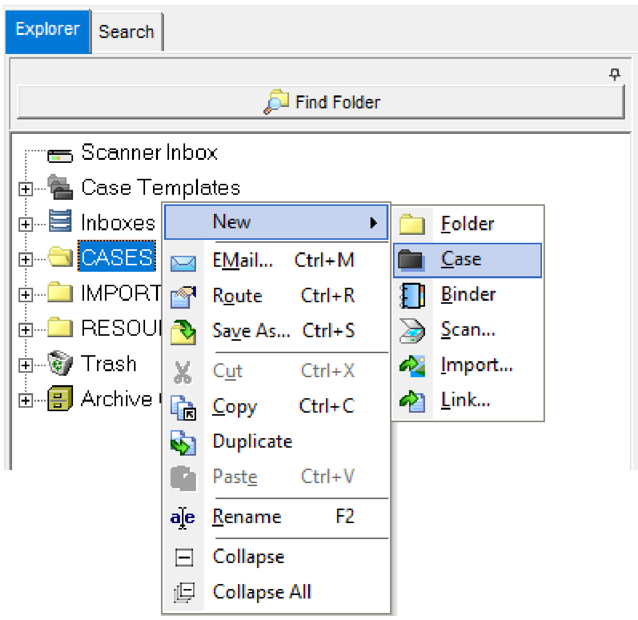
A template is the foundation of your files, providing the "skeleton" Case onto which your new client files will be built. Each Case includes one or more binders organized with tabs & sections to sort documents by type. Templates can also include Case-specific coding, including Annotation Color Labels, Annotation Issues, Team Flag Labels and List Views.

Similar to precedents found in a law firm, Templates allow files to be quickly assembled to a consistent standard. The new Case can be amended with additional Binders, tabs and sections as needed to reflect the unique needs of the file.

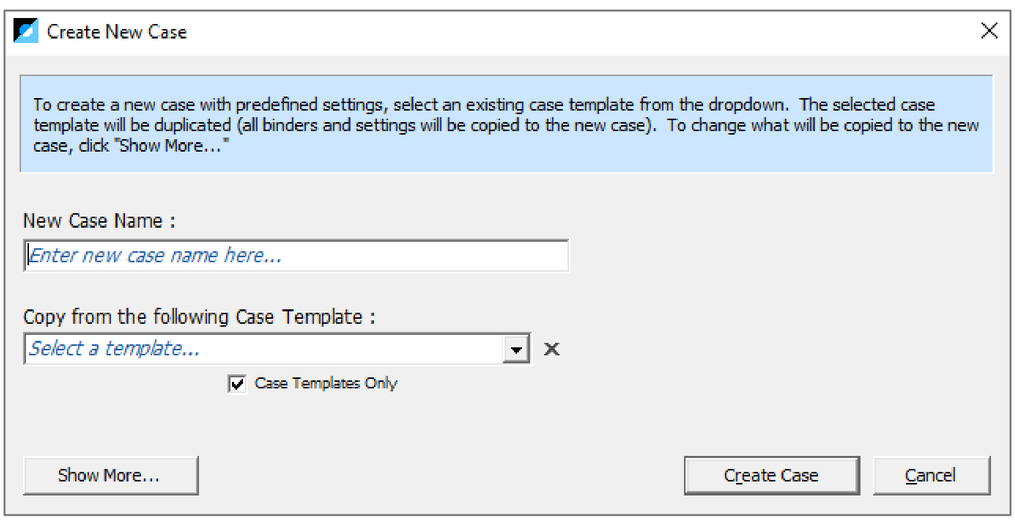
Each binder will be organized with tabs (shown in red text in the image to the left) and sections (identified with green text in the image to the left). Tab and section colors are customizable at the user level.

Creating a New Case in Primafact

1. In the Explorer view, right-click where you would like to create the folder and select **New** and then select **Case**.



2. 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.

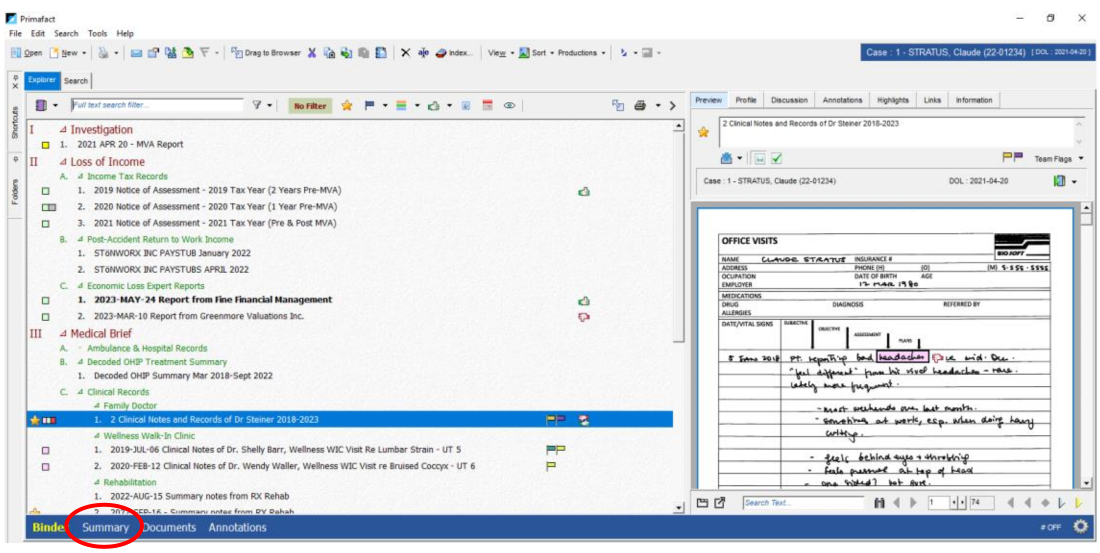
Note: You can also copy the structure and settings of a selected Case, in addition to copying from Templates, by un-selecting the ***Case Templates Only*** *checkbox. This allows you to use any Primafact Case as the basis of your new Case.*

Add Date of Loss to your Case

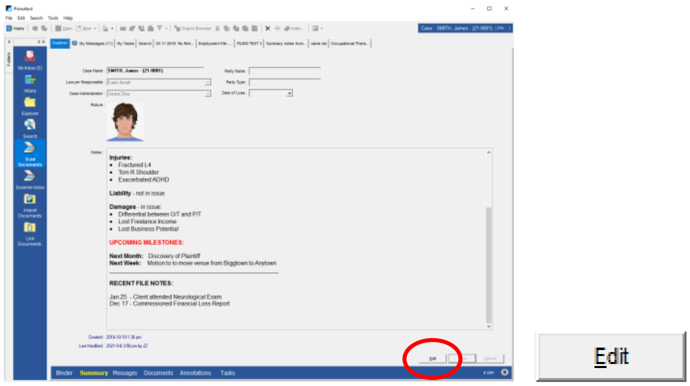
Adding the Date of Loss to your Case Summary makes it easy to filter Events by Pre-DOL and Post-DOL using Primafact filter tools. Also, the date of loss is displayed on all Case Binders and Case Views, for convenient reference.

To add the Date of Loss to your Case:

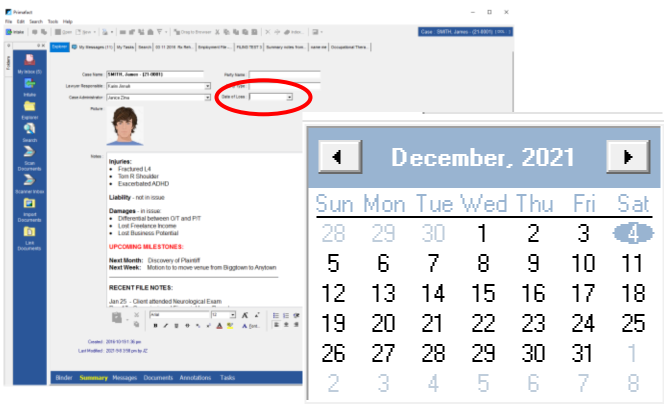
5. Navigate to any Binder in your Case
6. Select Summary on the blue case navigation ribbon.



7. The Summary Screen will open.
8. Click the Edit button to add the Date of Loss.

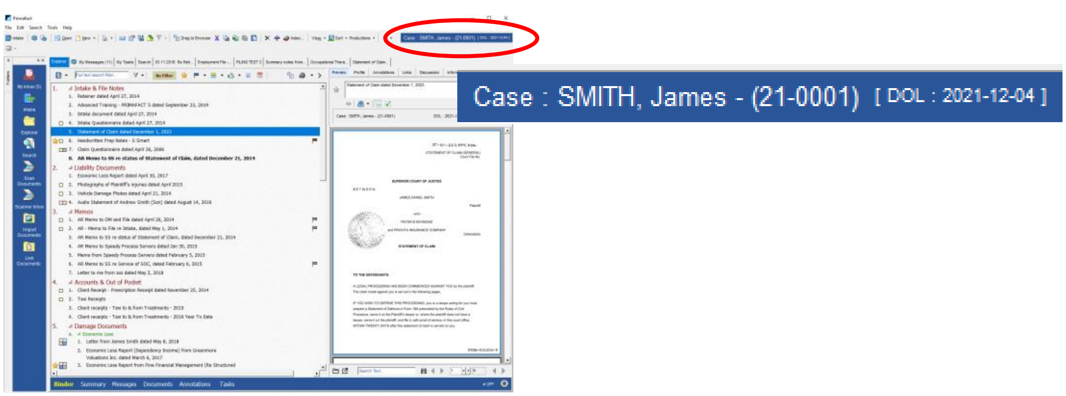


9. Enter the Date of Loss in the Date of Loss field



10. 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**-related filters.



Updating Existing Cases

Converting a Regular folder to a Case

If you are creating a Case from an existing folder, you can convert the folder to a Case.

1. Right-click on a folder and select **Convert to Case**.
2. The icon for the folder will switch from manila-coloured to black to signify the change to a Case. 

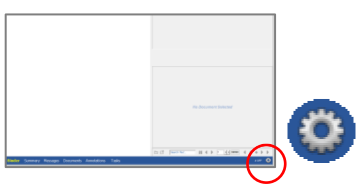
NOTE: Cases cannot be nested within other Cases.

Updating Existing Cases to Match Template Settings

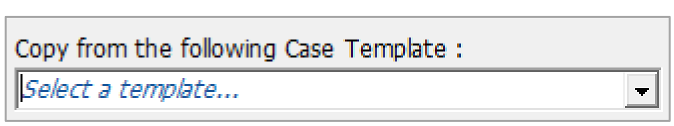
If you are updating to Primafact 6 with an existing caseload, it's easy to update existing cases to match your Templated Coding Standards and Case Views. You can even apply coding settings from another Case using this tool.

Apply Settings from a Template to an Existing Case

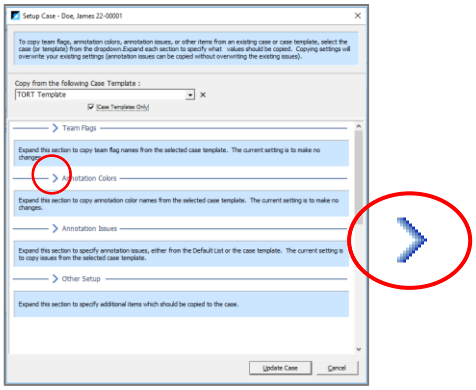
1. Start by opening a binder on the Case you want to update.
2. Click the Geary on the far-right of your blue Case Navigation Ribbon.



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.

Document-level Coding

Team Flags

Primafact 6 Team Flags allow you to tag documents with a labelled flag to easily identify and filter documents. Team Flag labels are set by the team. Team Flag Labels can be set up globally or by Case. (Applying Case label settings overrides the Global settings for that Case.)

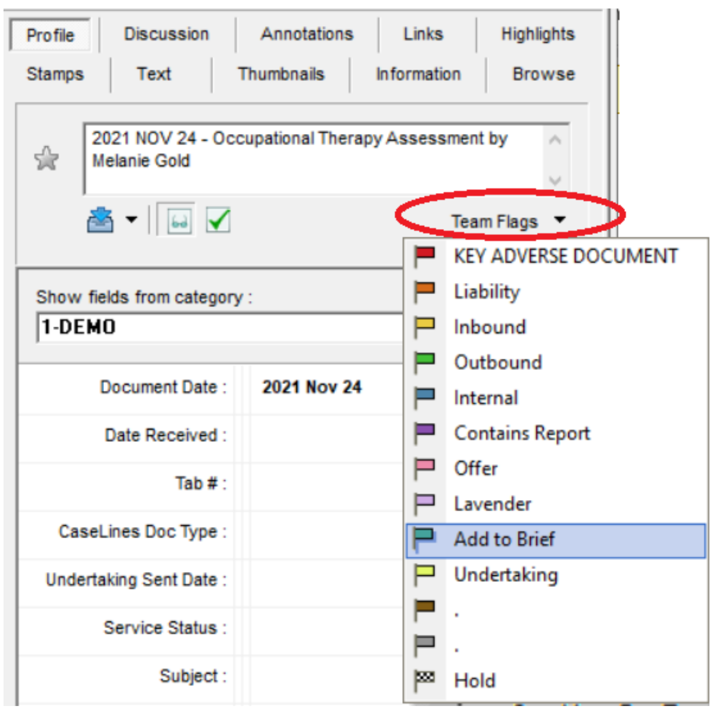
Thirteen (13) Team Flag colors are available in Primafact 6. There is no limit to the number of Team Flags that can be applied to a document.

Applying Team Flags

Apply to a single document

To apply a Team Flag to a document:

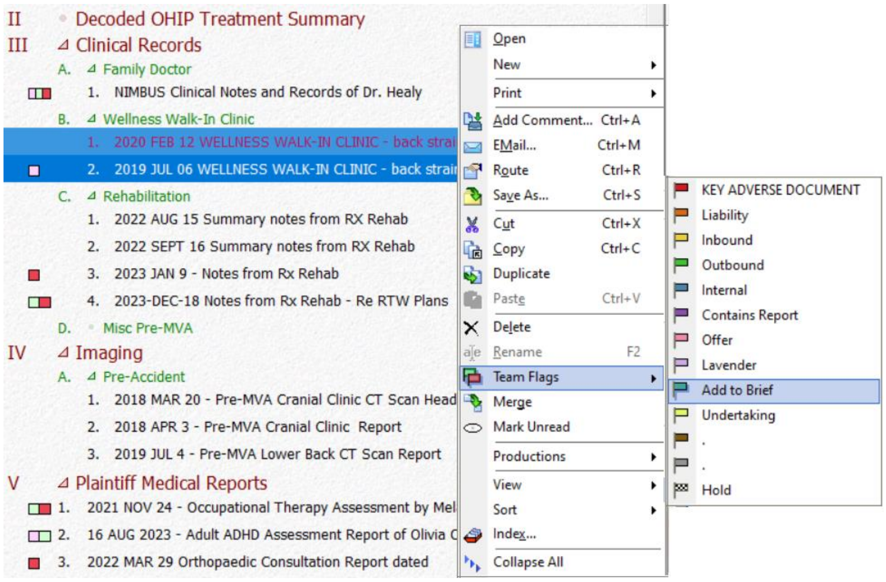
1. Click the **Team Flags dropdown** button on the document ***Preview*** or ***Profile*** Tabs.



2. Click the desired Team Flag to apply. Repeat as needed.

Apply Team Flag to Multiple Documents at One Time

1. Select your desired documents in the Binder or List View
2. **Right-Click** to display the pop-up menu:
3. Select **Team Flags**
4. Select desired flag. Repeat as needed.



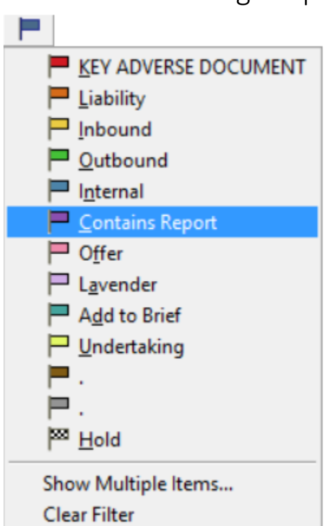
Removing Team Flags

Follow the same steps outlined in Applying Team Flags, above. Repeat as needed.

Filtering by Team Flag

You can filter by Team Flag in the Binder and List Views. Team Flag filtering is not available on the Search Tab.

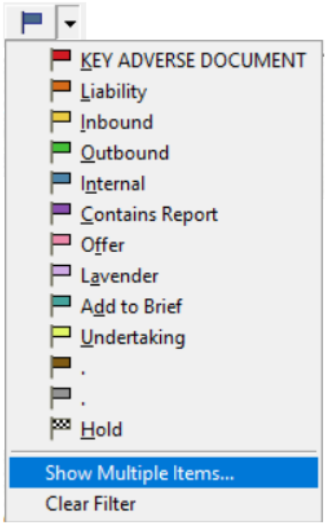
1. Click the Team Flag dropdown and select your desired flag filter.



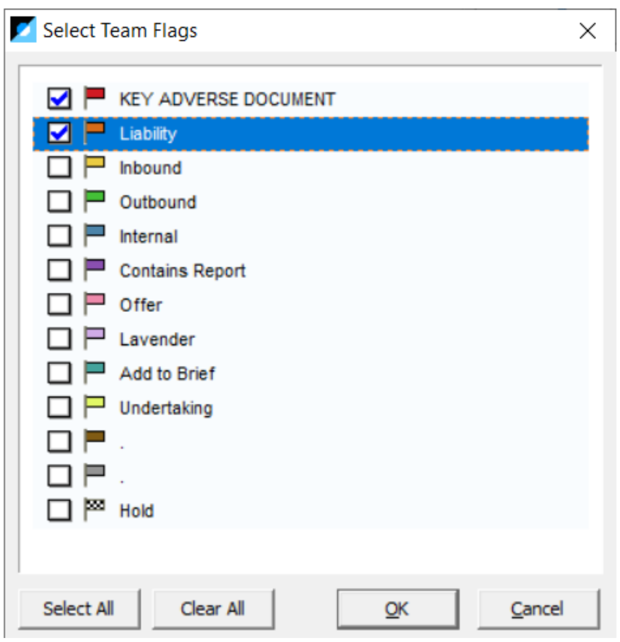
Filtering by Multiple Flags

To filter by more than one flag:

1. Click the Team Flag dropdown and select your desired flag filter.



2. The Select Team Flags window will appear:



3. Check the desired Flags.

   NOTE: The Team Flags Filter is an <OR> search among Team Flag Values. In the above example, this means that the filter will identify any document with either the Liability Flag or KEY ADVERSE DOCUMENT FLAG (or both).

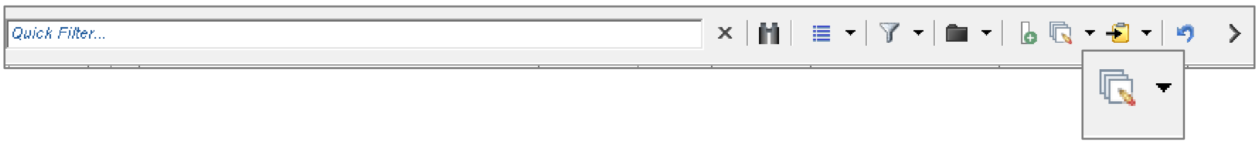
Profile Fields

Adding information to Profile fields makes it easier to record and retrieve document-level information as your case progresses. You can use profile field data to filter documents.

See [*Profile Fields*]() for details on customizing and managing Profile Fields.

Batch Profile Updates

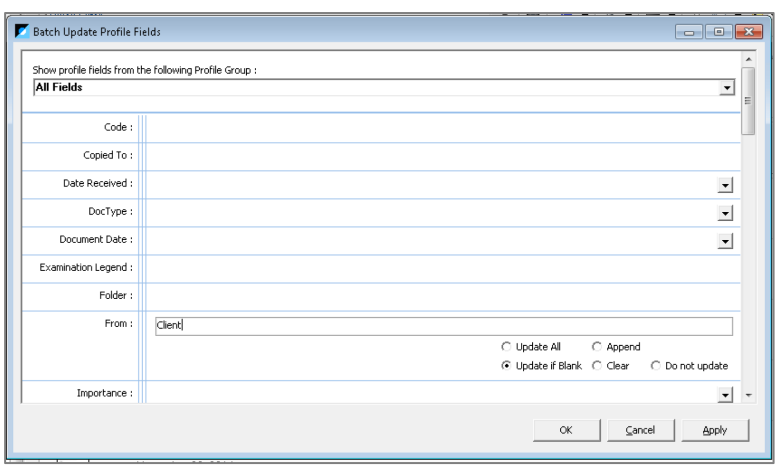
Batch Updates allows you to update Profile fields on multiple documents at one time using the the **Documents** List and Folder List views.



Complete a Batch Profile Update

You have the option of batch updating profile fields of selected documents or ***all*** documents on the filtered document list at one time.

1. To Complete a Batch Update, select the desired documents on your list, using the control (**CTRL**) key and your left-click button on your mouse. (If you plan to update all documents on the list, skip this step.)
2. Select the drop-down arrow beside the **Multiple Updates** icon. 
3. Select the desired scope (update selected documents or all documents).
4. Apply your desired values within the applicable profile field(s) – you may update several fields without leaving this window.



5. Click the applicable update button (**Update All**, **Update if Blank**, **Append**, **Clear**, or **Do not update**).
6. Select the **Apply** button to apply your changes.

7. Continue updating fields as desired.

8. When you have finished your updates press **OK**.

9. Your updated profile fields will be applied to the selected documents.

NOTE: You may use Batch Profile Updates to replace entire profile field content, or to append information to existing content.

! ***YOU CANNOT "UNDO" A BATCH UPDATE – you would need to revise fields individually or by completing additional Batch Update operations.***

Undo

The "undo" feature allows you to undo the following four types of operations:

- Folder and Document Deletions (depends on security settings)
- Folder and Document Cut and Paste's
- Folder and Document Copy and Paste's
- Reordering of Documents in a Binder

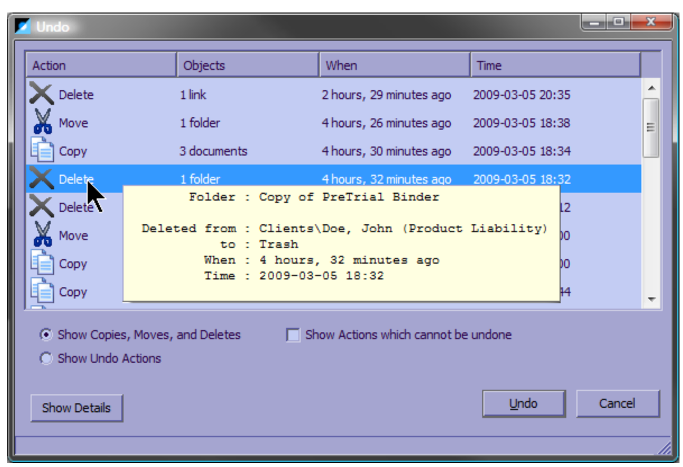
You cannot undo anything else in Primafact.

Primafact will remember Copies, Moves, Reorders and Deletes for up to 60 days.

Primafact only shows you the operations which you performed - **you cannot undo operations performed by other users**.

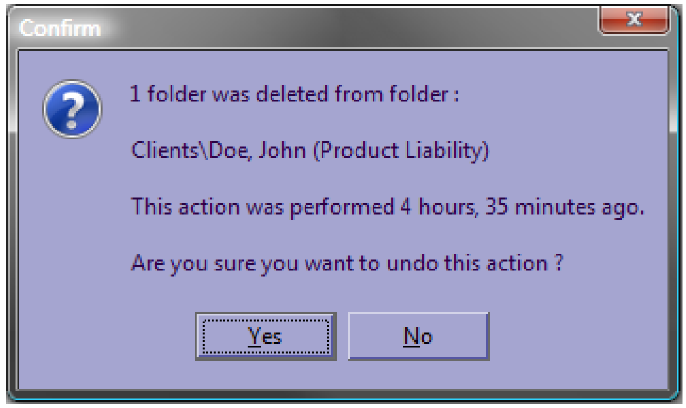
1. To access the Undo dialog, select Edit > Undo from the main menu while in the Explorer view. You can also press Ctrl+Z.

   The window lists all the actions which can be undone. As you hover the mouse over each one, details of the operation are shown.



2. To “Undo” an operation, highlight it and click the Undo. You will be prompted to continue. Click **Yes** to proceed. Only one operation can be undone at a time.

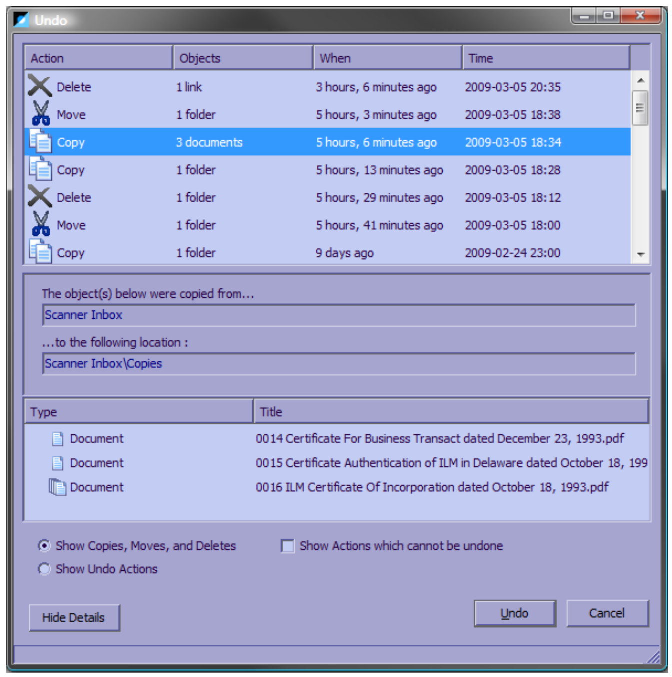
   In this example, "Copy of PreTrial Binder" folder was deleted from "Doe, John Product Liability)" 4½ hours ago. By undoing the deletion, the folder is moved from the trash to "Doe, John Product Liability)".



3. If you want more details shown for each operation, click the Show Details button at the bottom left of the dialog. A list of folders and documents which were copied, moved, re-ordered or deleted is shown.

   Some operations cannot be undone. For example, if a deleted document has been purged from the Trash, <u>it cannot be restored</u>.

   Also, depending on Security settings, most users may not be able to Undo a Delete. This is because of recommended Security settings of Read Only on the Trash, except for one or two uses that will maintain the Trash.



Team Document Sharing and Inbox Review

Emailing and Routing Primafact Documents via Outlook

You can share Primafact documents quickly and easily as e-mail attachments. E-mailing sends a copy of the document as a PDF file, although you also have the option of sending documents in TIFF format (which may be preferred for nuanced photos, for example).

EMail a document

(also see: "E-mailing and Routing Multiple Documents" below):

1. Open a document, right-click on the page and select **Mail > Email Document**, or use the toolbar button to do the same.
2. A window will display. You can change the File Name – PDF format and All pages of the document will be included by default.
3. There is a tab at the top for PDF options. Click on this tab for more options. You can specify whether you want annotations included, or if it is a colour document, you can adjust compression size to make the file size smaller for emailing (Note: to ensure photos sent as PDFs are sufficiently detailed, set the compression to no less than 40%. Alternatively you can send photos in TIFF Format.)
4. Click **OK.** Your usual e-mail window will appear with the document attached.
5. Enter the recipient's address and send your message as usual. When the recipient opens the attachment, the document will open up in their PDF viewer. (Documents sent as TIFFs will open in the recipient's default image viewer application.)

Note: Documents from Primafact can be dragged and dropped into an email you are currently creating in Outlook.

Document Routing

If the recipient is a member of your firm with access to Primafact, you should route the document instead of emailing it. (You can use e-mail if a staff member is offsite with no access to your network.)

Routing sends a shortcut to the networked document via an e-mail attachment, bringing you directly to the document (or specific page reference) in Primafact, keeping you connected to the system. (Alternatively you can send the document using Primafact's Messaging tool).

To ROUTE a document

1. Open a document, right-click on the page and select **Mail > Route Document Reference**, or use the toolbar button to do the same.
2. Your usual e-mail window will appear with an attachment featuring the Primafact icon.
3. Enter the recipient's address and a message. Click **Send**.

When the recipient opens the attachment, the document will open up in Primafact.

E-mailing and Routing Multiple Documents

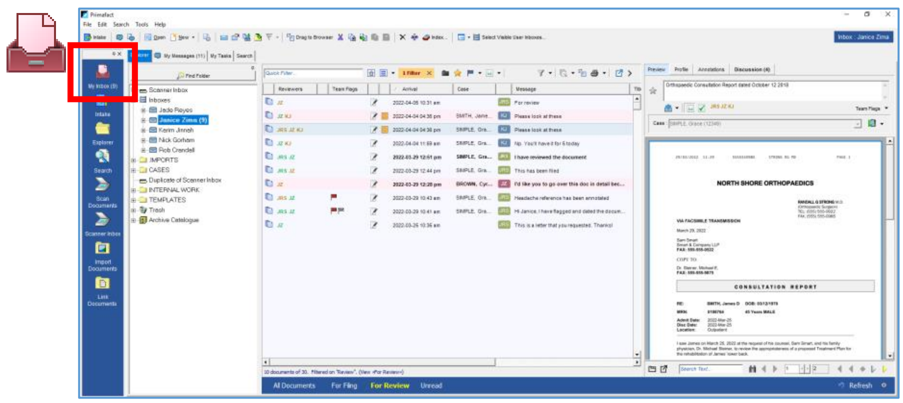
Multiple documents can be e-mailed and routed from the Primafact Binder view:

1. Highlight the documents you wish to send. Right click and select **Email** or **Route**. (You can also click the e-mail or route icons in the toolbar. Or you can press **CTRL+M** to email or **CTRL+R** to export.)
2. If you are routing, the e-mail window will appear with separate attachments for each document you highlighted.
3. If you are e-mailing, you will see the **Emailing a Document from Primafact** dialog. You choose between sending **Multiple PDF Documents** or **Single PDF Document** from the **Format** dropdown. If you select Single PDF Document, all the documents you highlighted will be merged into one large document, with bookmarks automatically inserted on the first page of each document. The recipient will be able to navigate each document using the Bookmarks pane in Adobe Acrobat Reader. If you select Multiple PDF Documents, a separate PDF will be created for each of the highlighted documents.
4. Click **OK** on the dialog. Your usual e-mail window should appear with either one PDF attached or with multiple PDF documents attached, depending on your Format selection from step 3.

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

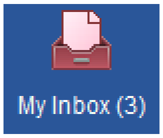
Main Inbox

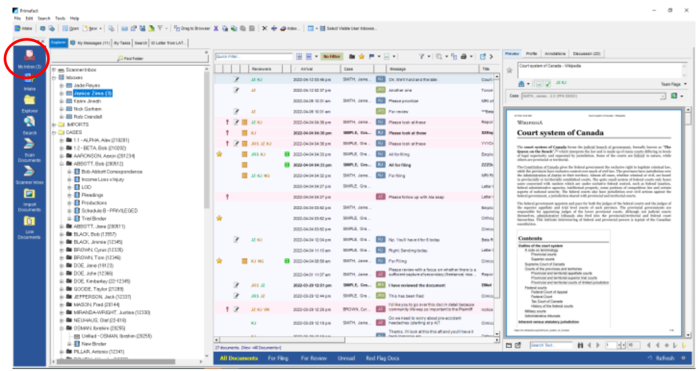
The top level of your Inbox (Main Inbox) is designed to show you anything new that has been added to your Inbox.

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.

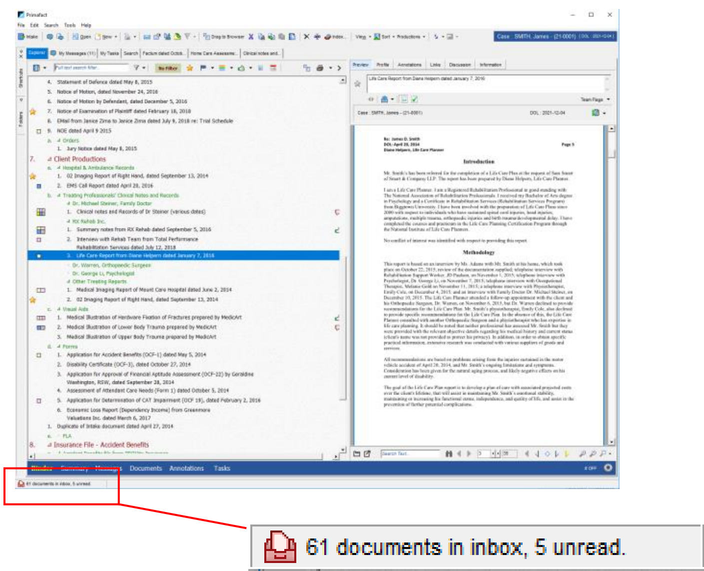
New Arrivals Indicator

When new documents or messages arrive in your Inbox, your Inbox Icon will display the number of unread items appearing in your Inbox:

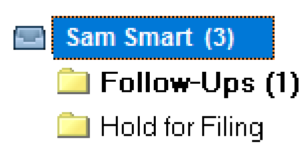




Note: If your shortcuts toolbar is hidden or disabled, your inbox notifications appear at the bottom-left corner of Primafact.



Identifying Inbox Folders with New Items



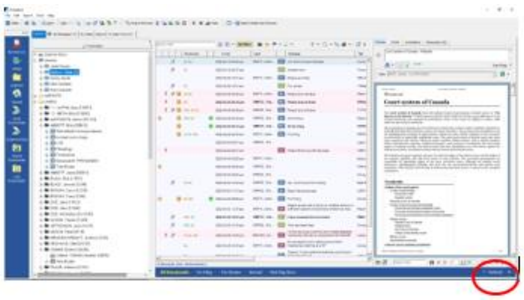
Individual new folders with new items will also display a bolded title along with the number of items:

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.

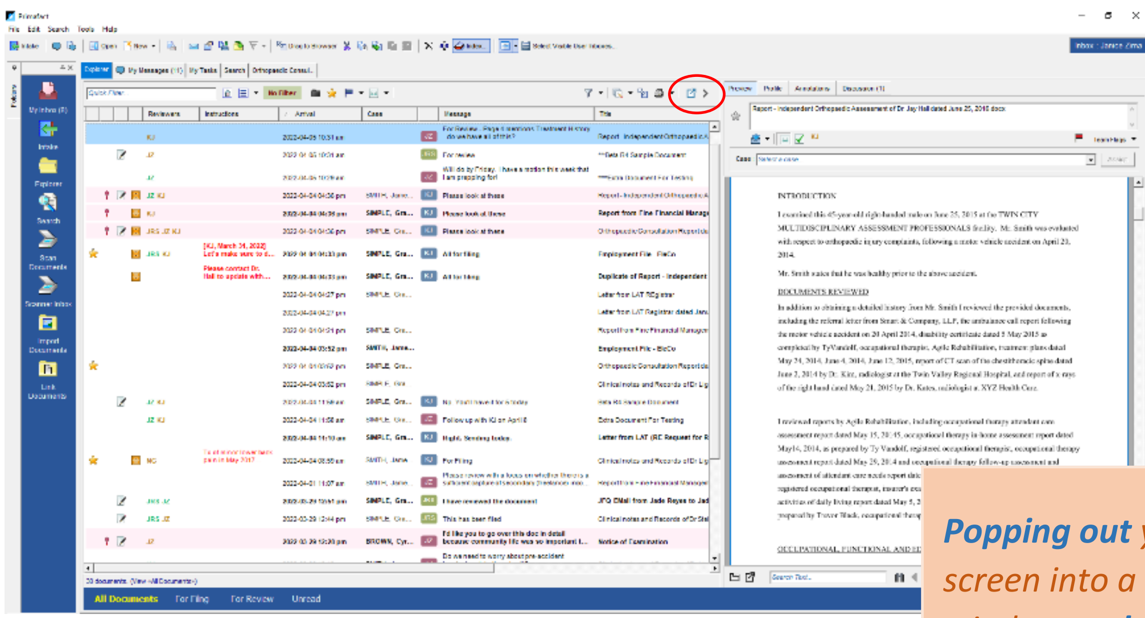
Primafact 6 has some built-in filters to make it easier to manage your Inbox content. You can add views as needed. See *Customizing List Views* for details on creating and managing List Views in Primafact.

Our *Creating Saved List Views* video tutorial walks you through the basics of creating your own list views.

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:

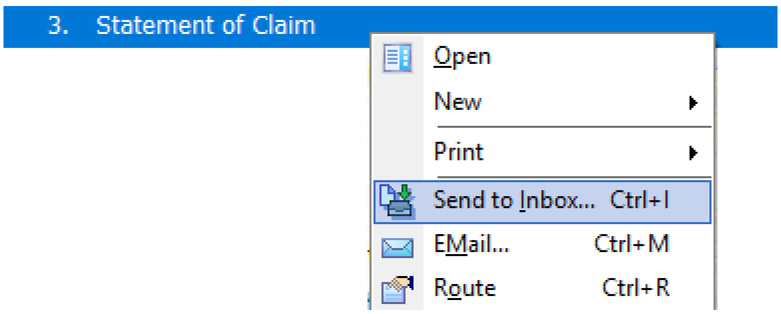


***Popping out** your Inbox screen into a new window **makes filing easier,** since you can view both locations side-by-side.*

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 Inbox List View, see [Customizing List Views](#), below.*

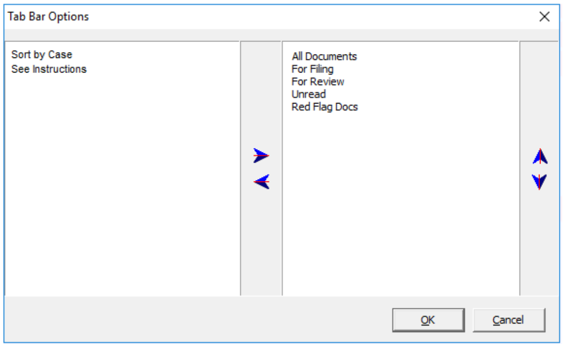
Customizing your Tab Bar

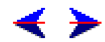
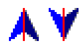
You can change the items on your Tab bar to provide quick access to the views that are most important to you.

To customize your Inbox 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.

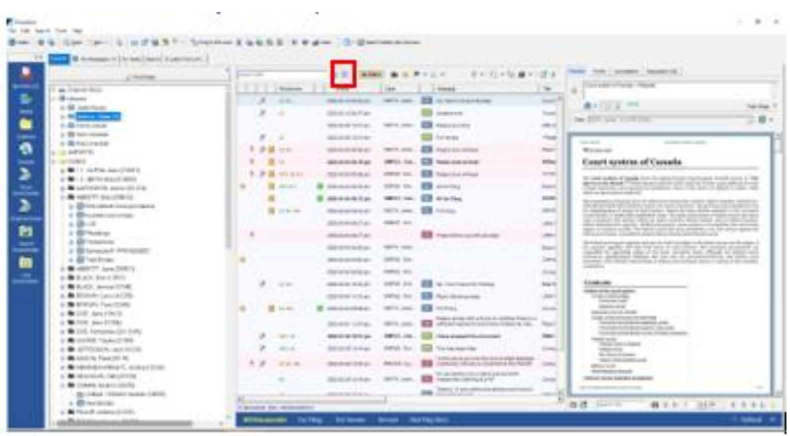
Change Inbox View – Folder Content

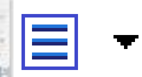
Inbox View settings can be set at the User Level to allow you to see your preferred fields and formatting when you review your Inbox. Changes to your own view settings will not impact other users.

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:

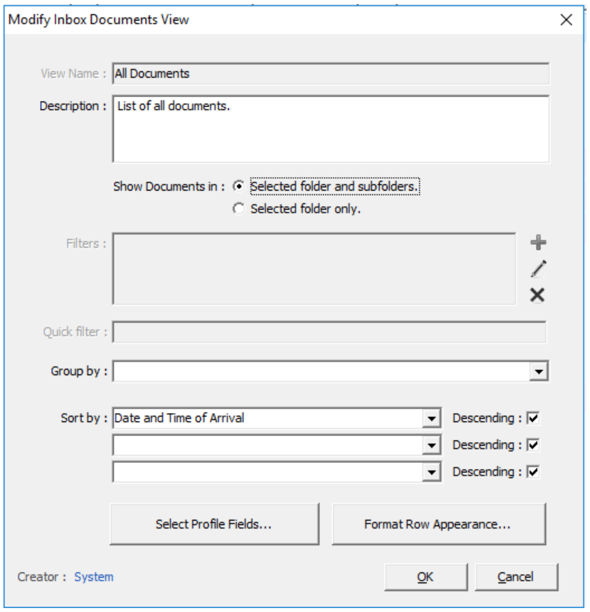
1. Click the More View Options Dropdown button





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.

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

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

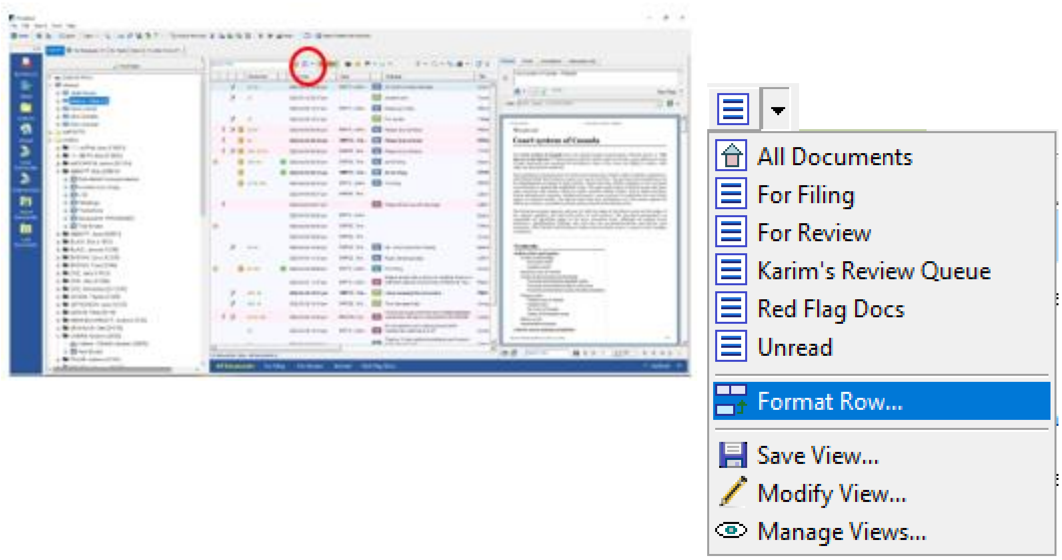
You may make additional changes to your Inbox view using this window as described elsewhere in this Guide.

Updating your Inbox View

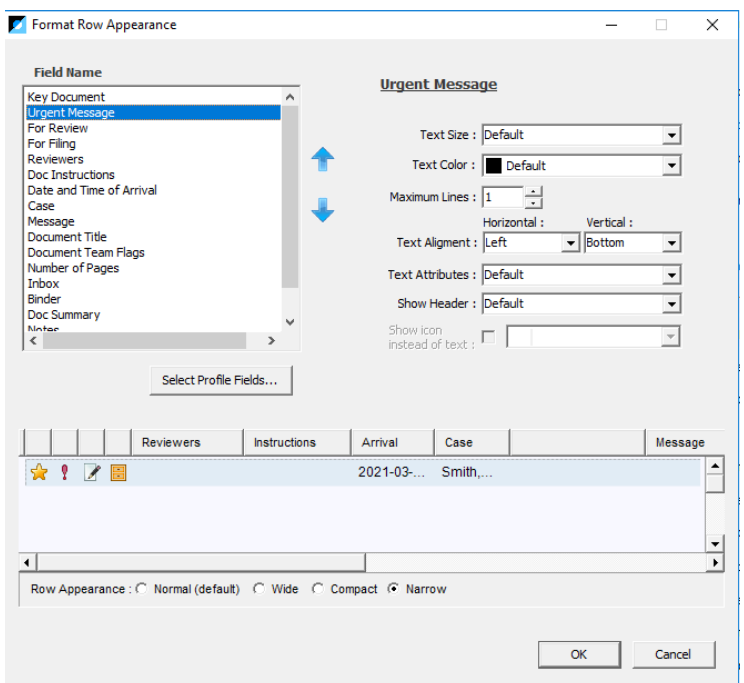
You can change your field display in your Inbox

To do this:

1. Click the View button and select Format Row.



2. The Format Row Appearance window will open:



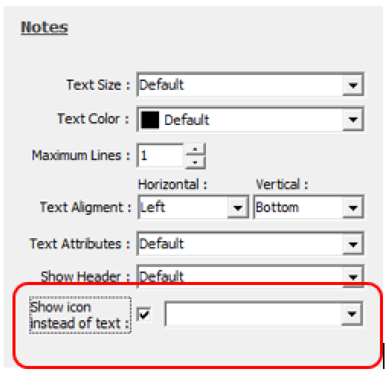
3. Select Profile Fields by clicking the Select Profile Fields button. Use the arrows to add or remove fields from your display.
4. Click OK to preserve your changes.
5. To position your fields, use the up and down buttons (if you do not see both, they will appear as you select an item further down the list.

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

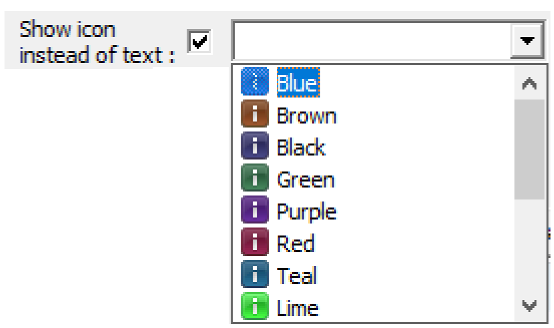
Formatting List Fields

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

8. To conserve space on lists, text fields, such as Notes, offer the option of showing an information icon instead of text:



9. Select your chosen icon using the dropdown.



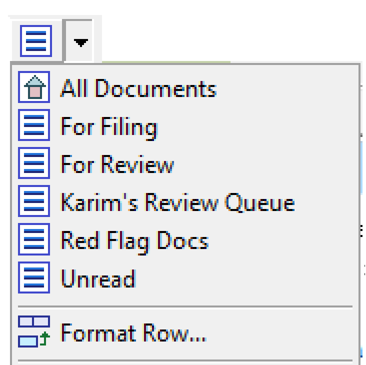
10. Click **OK**.

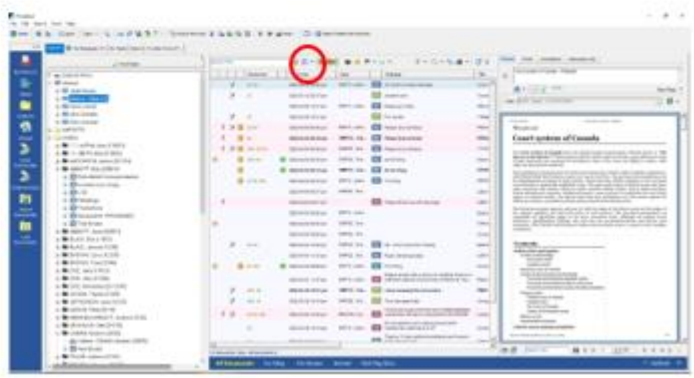
11. Add any filters, if desired.

Saved Views: Saving your View for Future Use

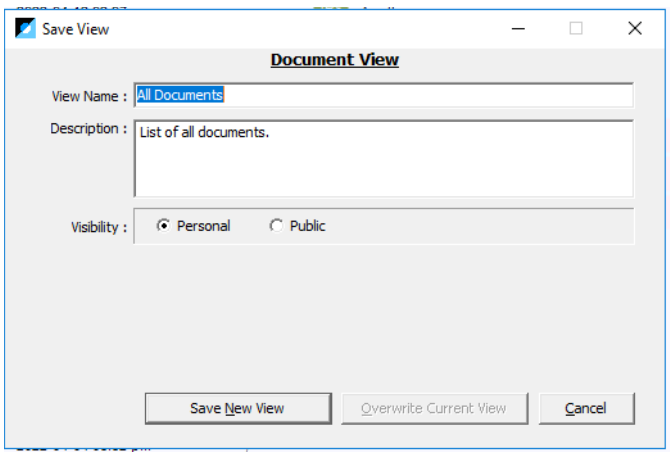
To save your view for use as a "Saved View":

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.*

Viewing Other Users' Inboxes

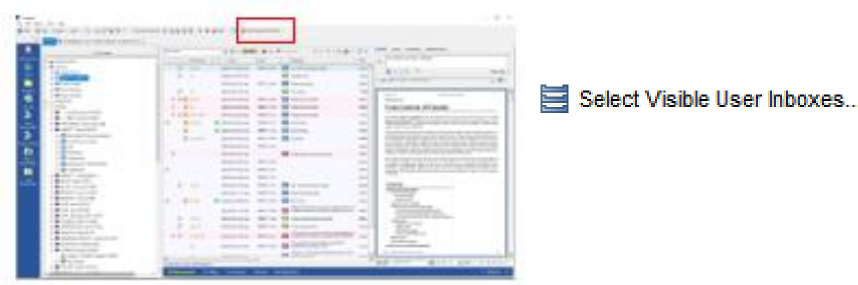
You can view documents in other users' Inboxes and Inbox folders. ***We do not recommend that you complete your own document reviews while viewing another viewer's Inbox.***

Selecting Visible Inboxes

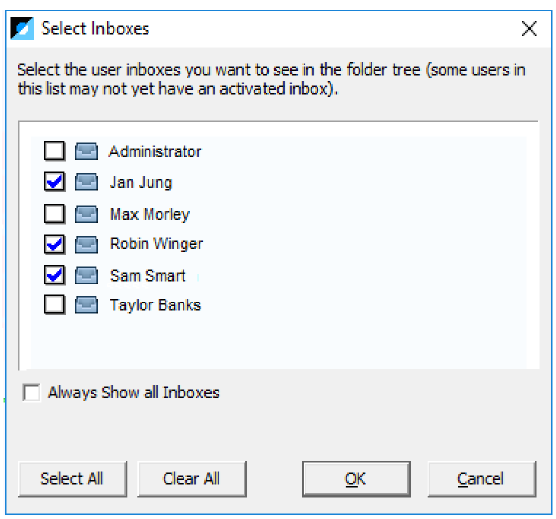
You can select which users' Inboxes are visible to you in Primafact.

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.

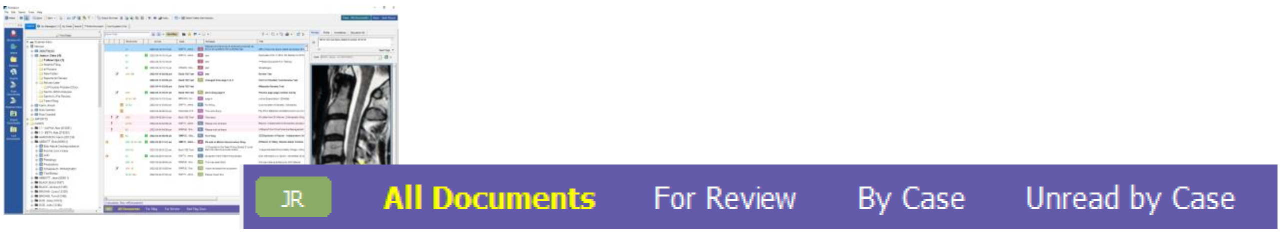


3. Check the User Inboxes you want to have visible in the Folder view. (Your own Inbox will not be visible on this list, as it is viewable by default.)

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.*

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.

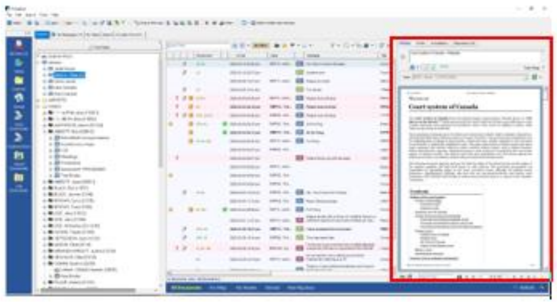
Watch our video tutorial on Document Intake and Review Workflows.

Early Case Assignment - Assigning Documents to a Case before Filing

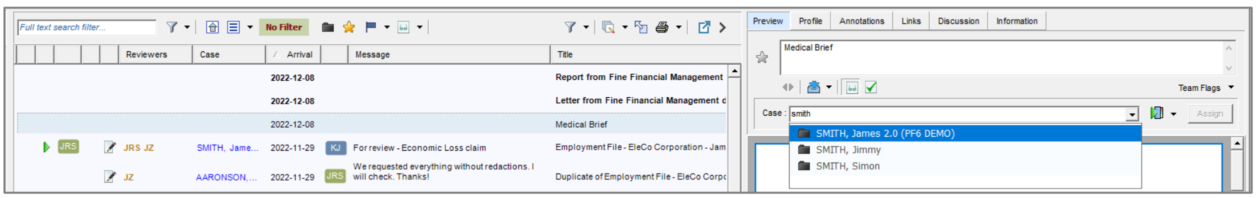
The ***Early Case Assignment*** tool lets you assign documents to a Case from the Inbox before filing in a Case binder. This allows you to use Case coding tools while a document is awaiting review within Inbox, allowing users to effectively complete document reviews and coding as soon as a document is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

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.



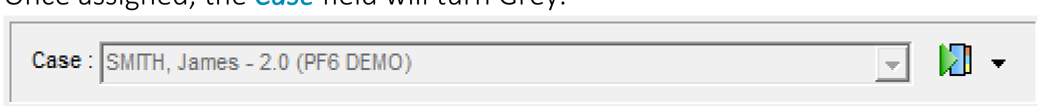
3. Start typing part of the Case Name in the Case area to display matching options.



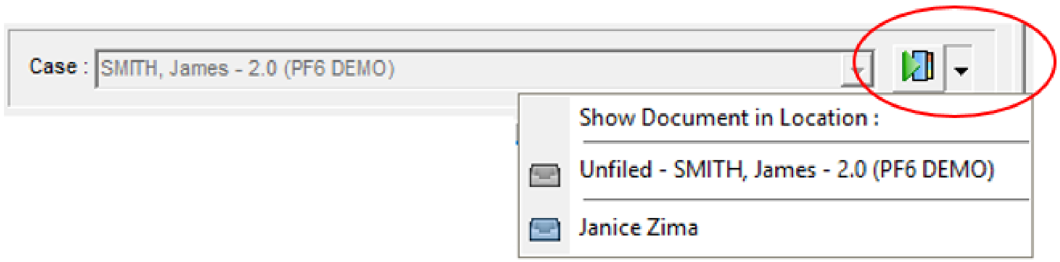
4. Select the desired Case.

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.*

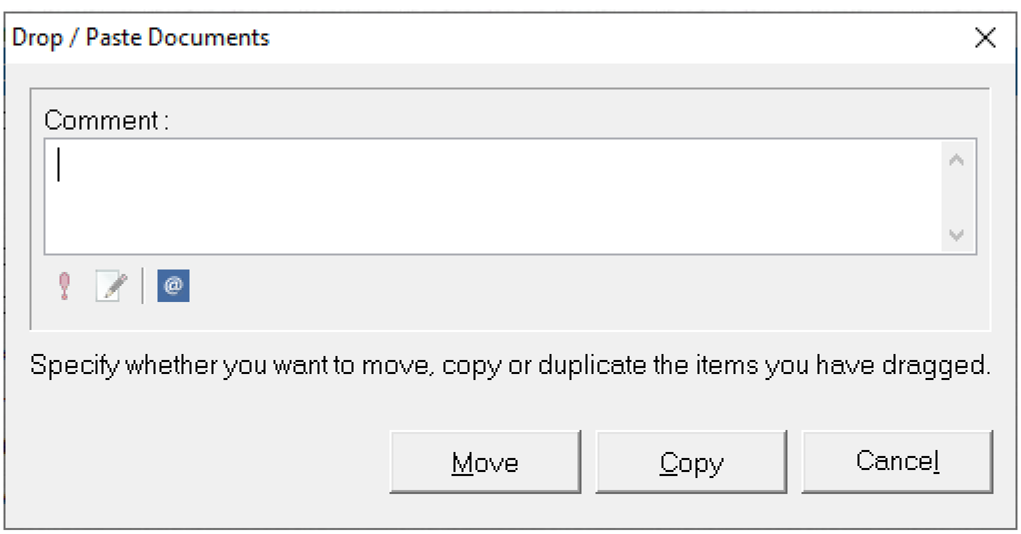
Sending Documents to Other Users' Inboxes

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**"

Clicking **Copy** will keep the document in its current location and deposit a copy (linked to the same document) in the recipient's inbox. Clicking **Move** will transfer the document to the recipient's Inbox.



Send a comment to multiple recipients at the same time:

1. Select your document & drag to a single user inbox
2. To add recipients, Type your Message in the new comment window at the bottom of the discussion tab. Use the @ key on your keyboard or the blue @ button to select recipients (as you type names, matches will appear. Click on the name on the menu to select.
3. Add comments if you wish.
4. You may also mark documents Urgent or For Review.
5. Clicking Copy will keep the document in its current location and deposit a copy (linked to the same document) in the recipient's inbox. Clicking Move will transfer the document to the first recipient's Inbox, and copies of the same document to other recipients' Inboxes.

Sending A Message (Document Discussions)

Send a comment to multiple recipients at the same time:

1. Select your document
2. Click on the Discussion tab
3. Type your Message in the new comment window at the bottom of the discussion tab. Use the @ key on your keyboard or the blue @ button to select recipients (as you type names, matches will appear. Click on the name on the menu to select.

4. Add comments.

5. Adjust the page if you wish to direct the recipients' attention to a different page.

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

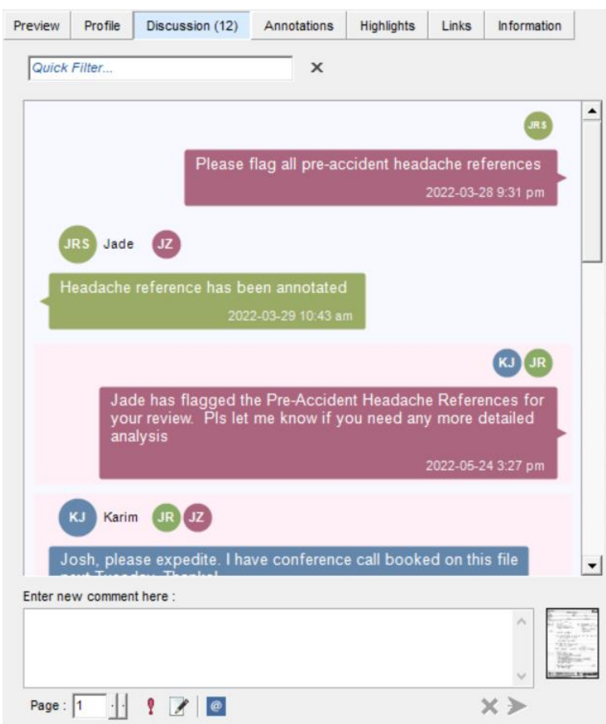
7. *NOTE – Documents sent using the Send to Inbox menu item stay in your Inbox after sending. If you wish to delete from your Inbox you will need to delete after sending to other users. They remain selected after sending so are easy to identify.*

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.



Opening at specific page

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.

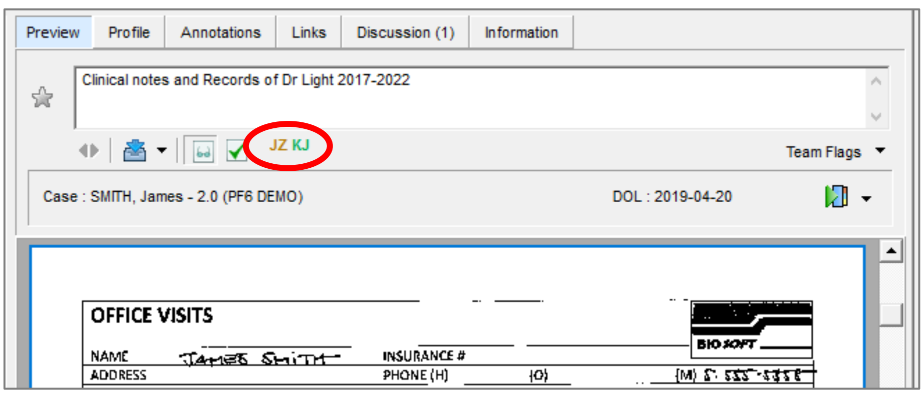
See *Updating Your Inbox View* for details on how to make Notes visible on your Inbox List.

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** and **Profile Tabs** when viewing the document Preview. Reviewers' initials appear on the Profile Tab when viewing the Open document in the Normal View.

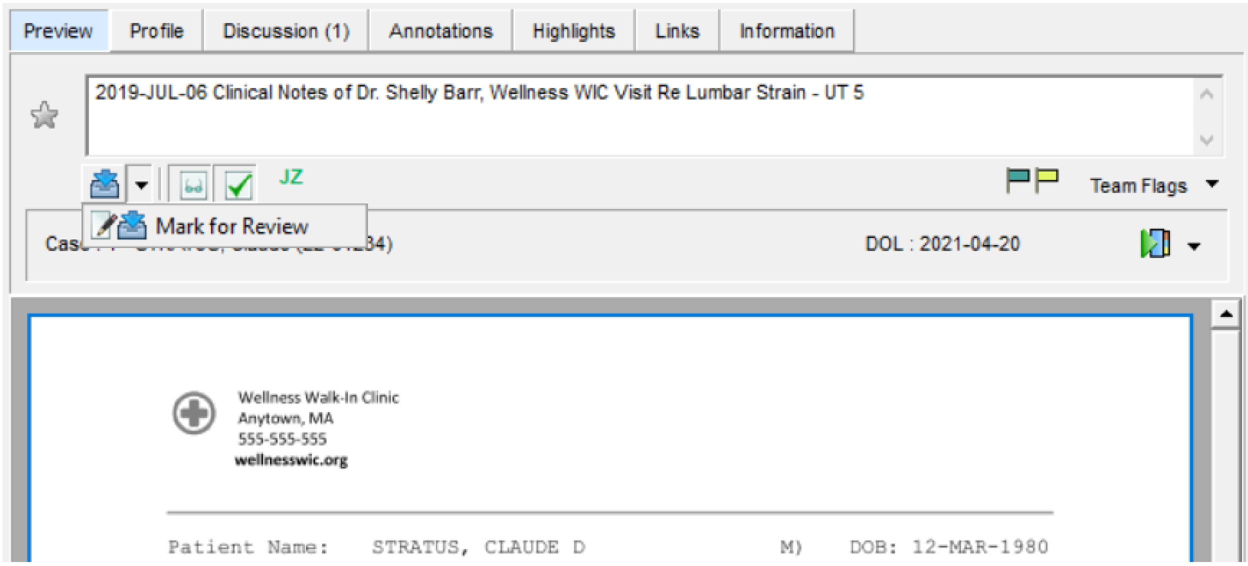


- Initials in Gold (**JZ** in this image) indicate a document is marked "For Review" for that user, but not marked done.
- Initials in Green (**KJ** in the above image) indicate a document has been marked as reviewed by that user.

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).

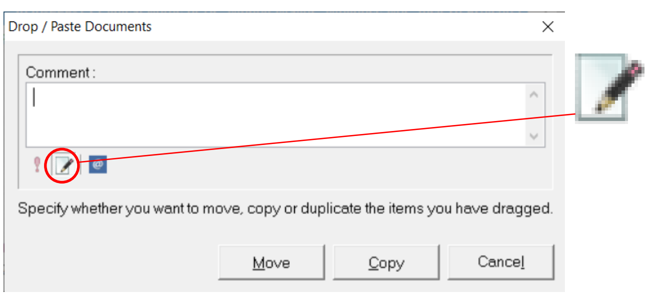
Click **Mark for Review.**



Your initials will appear in gold.

Marking a Document for another User's Review

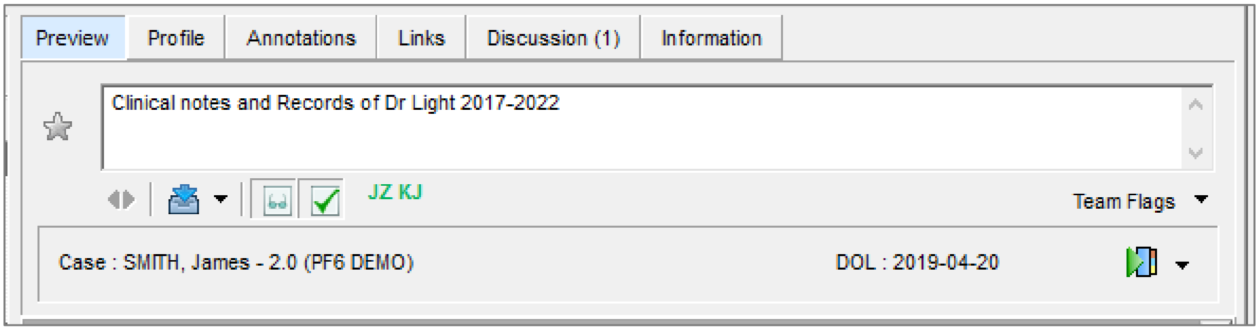
When sending a document to another User, select the "For Review" button on the **Drop/Paste Documents** window.



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 gold 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.

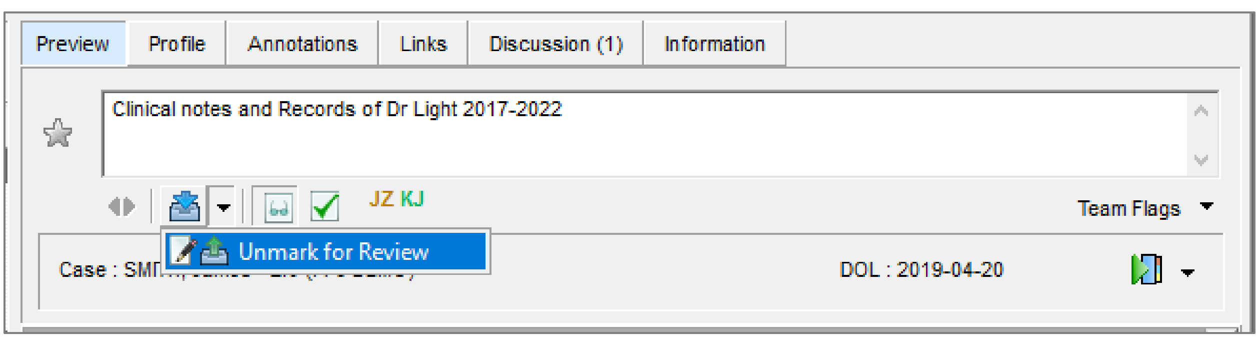
Changing a "Done" review back to "For Review"

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 gold, and your document will be returned to the "For Review" list.

Unmarking a Document For Review

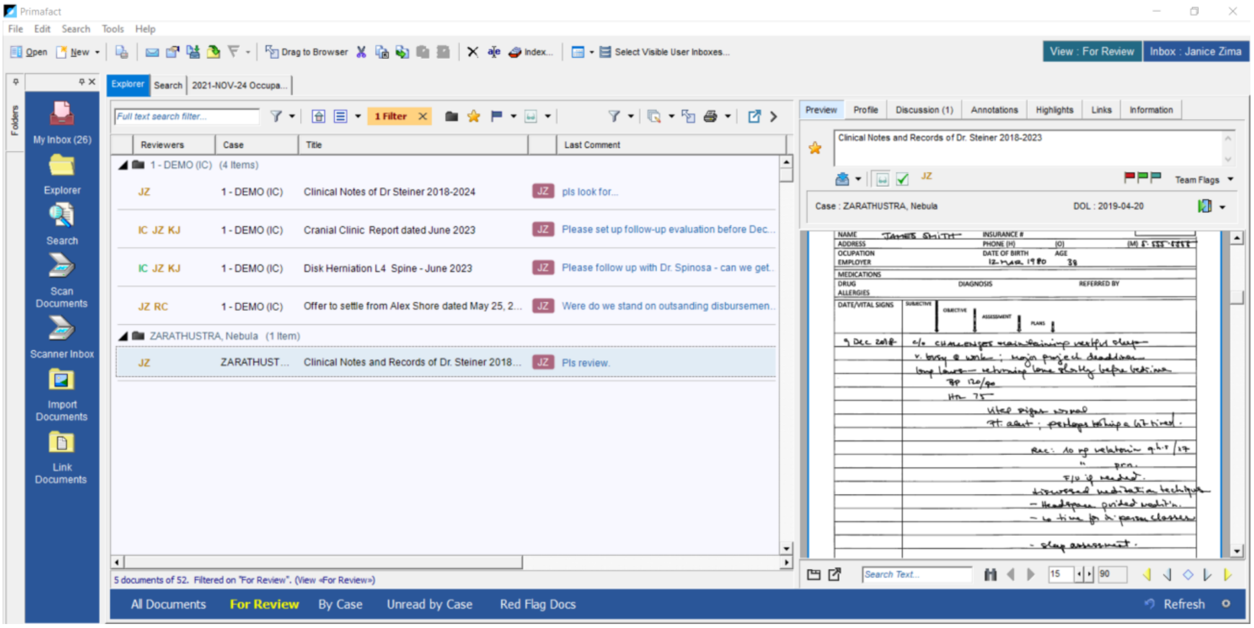
To unmark a document for your review, click the click the dropdown arrow beside the **Inbox Icon** on the Preview Tab (Profile Tab on an Open Document).

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.*

Working with Annotations for Document Review and Analysis

About Annotations

Annotations are designed to identify important document content, and to capture notes and coding that make it easier to review your materials as the case progresses.

You may use annotations to:

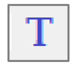
- ✓ Highlight important parts of a page, just as you would use a highlighter on a paper page
- ✓ Highlight important parts of a page and add your analysis, or assign an Issue
- ✓ Summarize handwritten text that cannot be OCR'ed
- ✓ Redact sensitive content (See Redactions)

Annotations incorporate coding tools, including Annotation Event Date, Favorability, as well as Color labels and Issue labels that can be set up by your firm to enable standardized coding for consistent review as a case progresses.

Annotations are designed to stay confidential to the firm, as solicitor's work product. By default, they are not emailed and they can never be included in a Published CD. However, you can choose whether or not to include them when exporting to certain formats, including PDF and printing.

Creating an Annotation

1. Identify an area you wish to annotate. (This can be done in an open document or from the preview pane).
2. Holding the left mouse button down, drag the mouse down and right until the box surrounds the area you wish to highlight. Release the left button when you have highlighted the area. A dialog box will appear.
3. Type in your notes as desired (this text can be changed or added to later.) If you do not enter any text, the annotated area will still be highlighted.
4. Select your annotation type (Analysis is the default).

5. Add your Issue(s) as applicable.
6. Fill in any of the additional fields as desired.
7. Select the **T** button to insert any document text that appears beneath your annotation area (this applies to OCR'd text only). 
8. Click OK. Your annotation will appear in the annotation list shown in the Annotations tab.

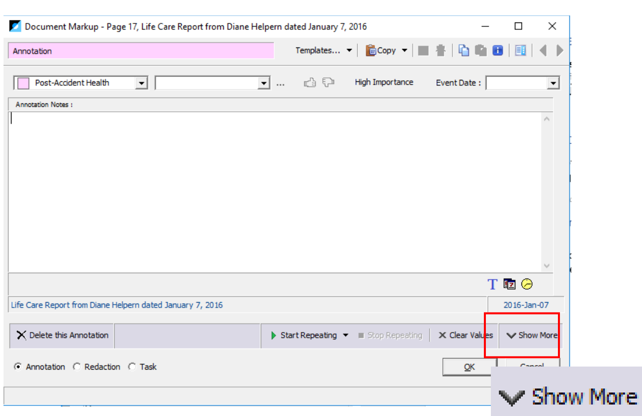
Simple and Expanded Annotation Form

The Annotation form appears when you create a new annotation, or click on an existing annotation (within the document area) to edit. This form allows you to record information for future recall and analysis.

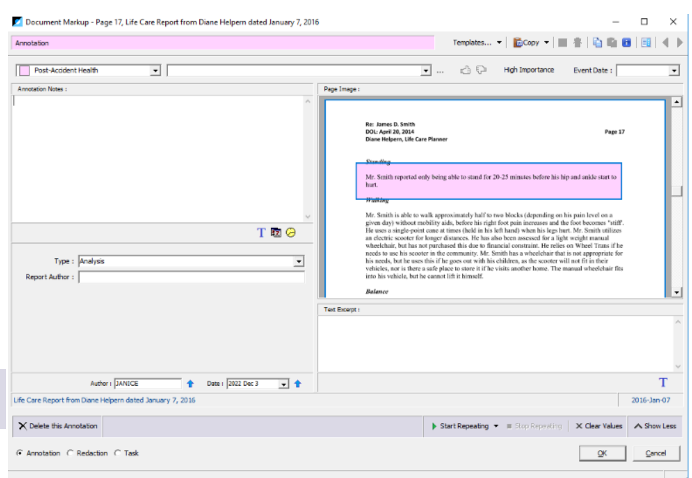
Primafact 6 Annotation Forms support uniform visual coding, along with dedicated fields to support quick assembly of Chronologies, Discovery Outlines and other reports. The annotation form can be expanded to capture more information. Clicking the **Show More / Show Less** button at the bottom-right corner of the Annotation form will expand or limit the display.

Annotation Forms also offer automation options for more efficient coding.

Simple Form:

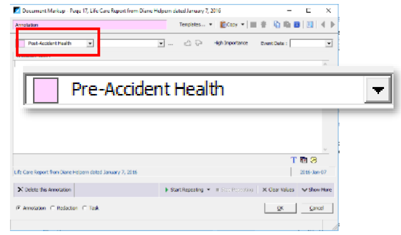


Expanded Form



Fields on Annotation Form:

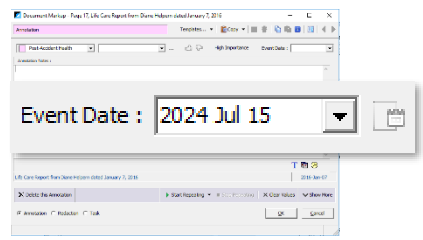
Labelled Color Coding



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.

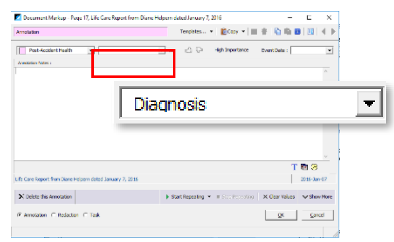
Event Date & Time



The Event Date field is 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.

Issue Coding

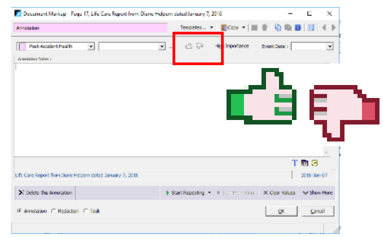


Using Issues allows you to add nuance to your Annotations for more granular filtering and reporting. You can apply multiple issues to a single annotation, making it easy to cross-reference annotations, or use for multiple reports. For example, you could create Issues for multiple witnesses, to pull together examination preparation lists for each witness – even where a production is applicable to more than one witness. This lets you create a simple annotation for everyone.

Embedding Annotation Issues in 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.

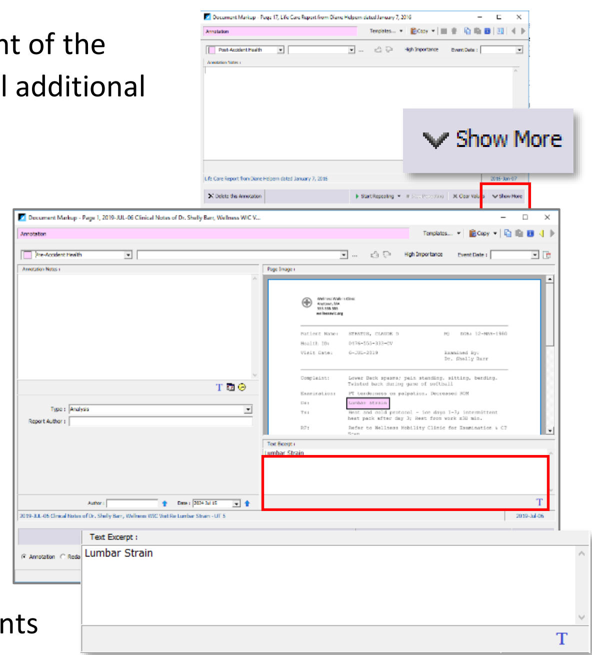
Favorability Coding



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.

Fields Found on Expanded Form:



Clicking the “Show More” button at the bottom right of the simple Annotation Form expands the form to reveal additional fields.

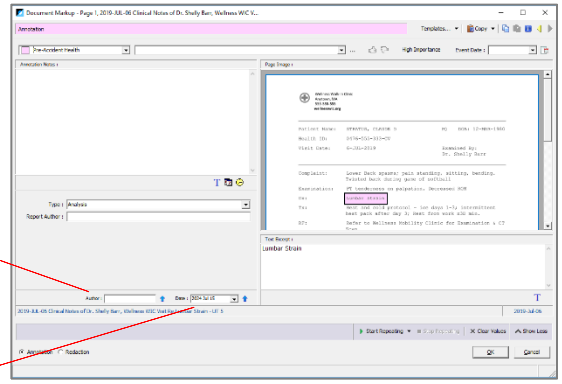
Text Excerpt

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.

Annotation Author

This field records the team member who has created the Annotation.



Annotation Date

This field records the date the Annotation was created. (This is distinct from the Annotation Event Date, which tracks the event date of the subject litigation).

Annotation Type

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

Report Author

Tracks the originator of the document content. For example, the doctor who writes a medical opinion.

Page Image

This area shows the annotated page in Primafact, and you can scroll to view convenient annotation context.

Redactions

Redactions block out sensitive document content that you do not wish to share with outside parties.

In Primafact, redacted text is visible through a dark grey transparent box. You can choose to output redactions in black or white by selecting the appropriate option when printing, e-mailing, exporting and publishing documents. Redactions are automatically applied to documents exported from Primafact using the PDF export and Primafact Publish tools.

Creating Redactions

1. Create redactions as you would an annotation - identify an area in the document page you wish to redact. Place your mouse in the top left corner of the area to redact. Holding

the mouse button down, drag the mouse down and right until the box surrounds the area you wish to redact and then release the left button when you have highlighted the area.

2. The Annotation form will open. Select the Redaction button at the bottom of the form.

You will notice the form header change in color to dark grey.

3. Press the "**OK**" button to preserve your redaction.

Annotation Efficiencies

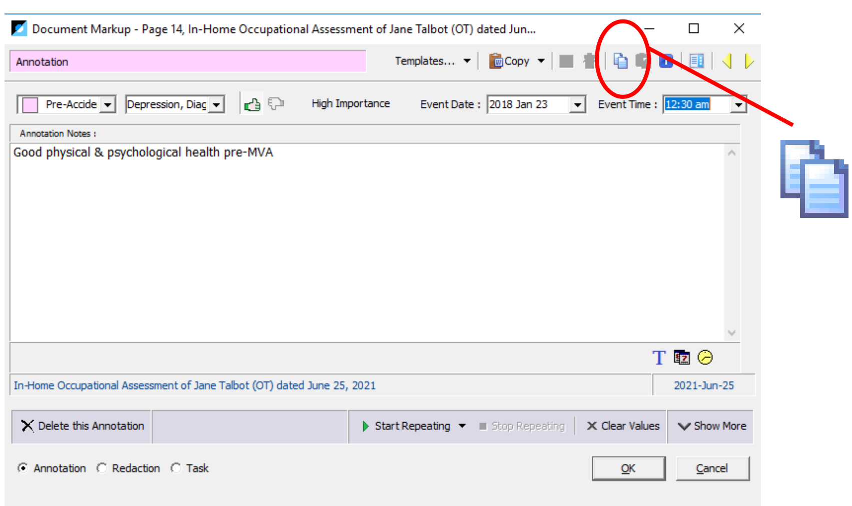
Annotation Automation tools, including ***Annotation Templates*** and ***Annotation Repeat*** tools are designed to make repetitive coding more efficient.

Annotation Copy

Copy Annotation Content to another Annotation

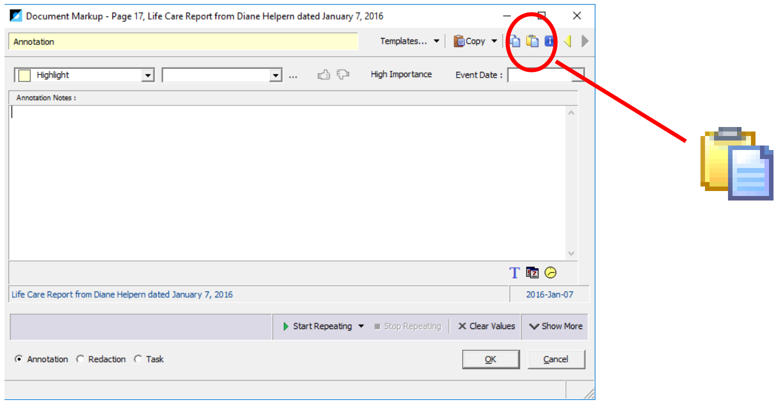
Use the Annotation Copy button to copy instantly copy Annotation content into another Primafact Annotation. Coding is copied, except for Annotation Issues and Annotation Text fields.

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.



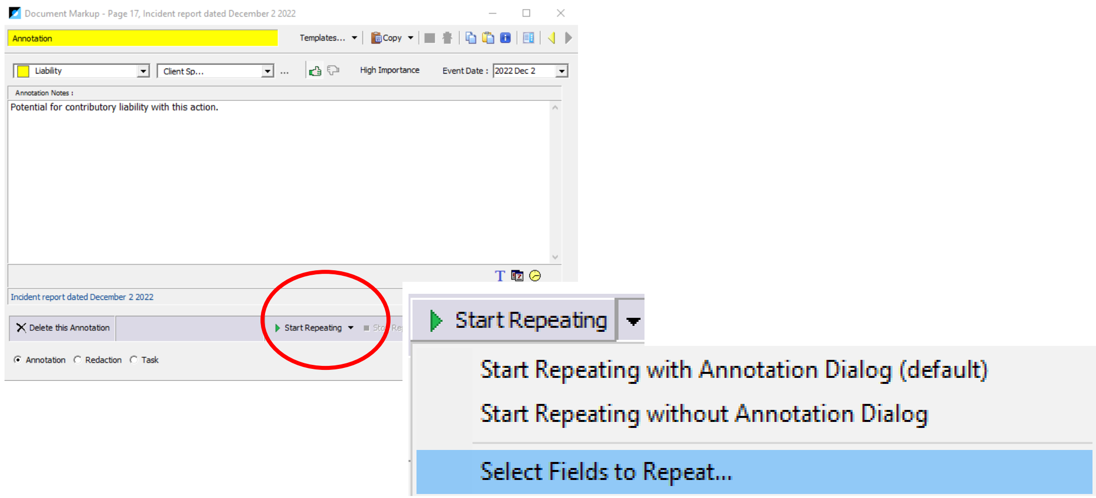
6. All copyable fields will populate the current annotation.
7. Click OK to save and close.

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

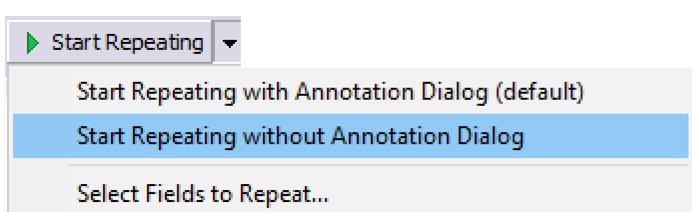
      ii. Create a new annotation. Annotation Form will open with selected fields populated. Update as desired. Click OK to save and close.

      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

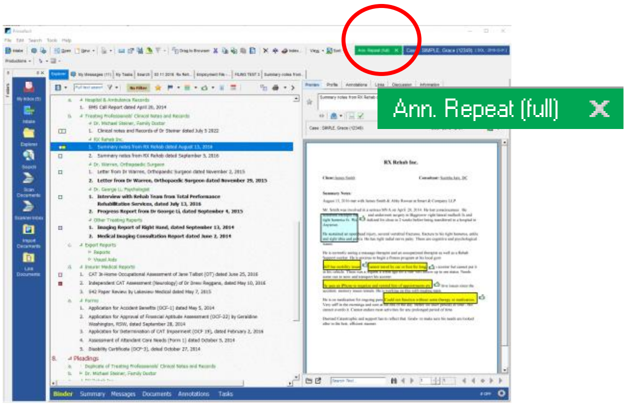


      iii. Create a new annotation. Annotation will be created with selected fields populated without form opening *iv.* Annotations will continue to be created with selected fields repeated until Repeat is stopped.

v.

Stopping Annotation Repeat

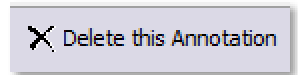
When you are ready to stop repeating your Annotation, **click** the green **Stop Repeating** button at the top-right of your Primafact window.



Deleting Annotations

You can delete annotations you no longer need, but be careful – there is no "undo" button to restore deleted annotations.

To delete an open annotation:



Open Annotation form: click the "Delete this Annotation" button at the bottom-left corner of the Annotation form.

On Annotation Lists: Select your annotation(s). Right click and select "**Delete Annotation**."

Reviewing Annotations

Viewing Annotations

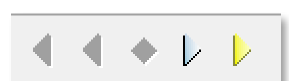
Quick View: Hover your mouse over the annotation you wish to view. An i will appear; hover over the i. The contents of the annotation will appear in a yellow box below your mouse.

You can also open an Annotation by clicking on it (either on the document or on an annotation list) to see the entire Annotation.

Annotation information can also be reviewed on the Annotation List, and on the Annotation Tab of an open document, or on the Annotation Tab of a document viewed in the Preview pane.

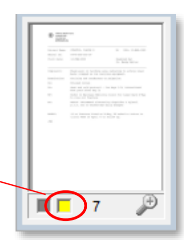
Browsing Annotations

Annotated documents are identified by a small colored box to the left of the document name in the binder view.



Within an open document, you can move to the next or previous annotated page by clicking one of the yellow arrows on the Primafact toolbar.

Pages with annotations are identified by a yellow square in the thumbnail view.



Hiding Annotations

You can show/hide annotations and other markup when viewing documents in a Tab or separate window in Primafact. See *Adjusting Markup Display on a Document in Primafact* for details.

Annotation Lists and Reports

The Annotations List

The Annotations List is a collection of all annotations on a Case. Filtering the Annotations List allows you to limit displayed annotations to specific annotated content for focused review.

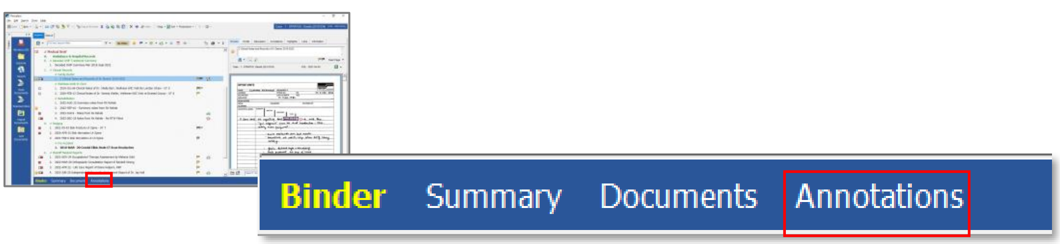
Annotation Lists can be easily filtered and sorted, and you can format lists to display desired content in your preferred order. You can save lists to enable easy access to formatted and/or filtered annotations to accommodate different review requirements – for example you may create a view for an issue chronology, and a different view to track witness preparation lists or diagnostic findings.

Annotation Lists can be exported in various formats, including Word and Outlook.

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*.

Accessing the Annotations List

The Annotations List view can be accessed by selecting the **Annotations** option on your Blue Case ribbon. You must select a Case Binder to access the blue Case Ribbon.



Annotation Filtering

Annotation filtering can be accomplished by a combination of the terms you type in the Quick filter and the options available in the Filter drop-down, offering considerably more flexibility in determining the scope of Annotations identified in a search.

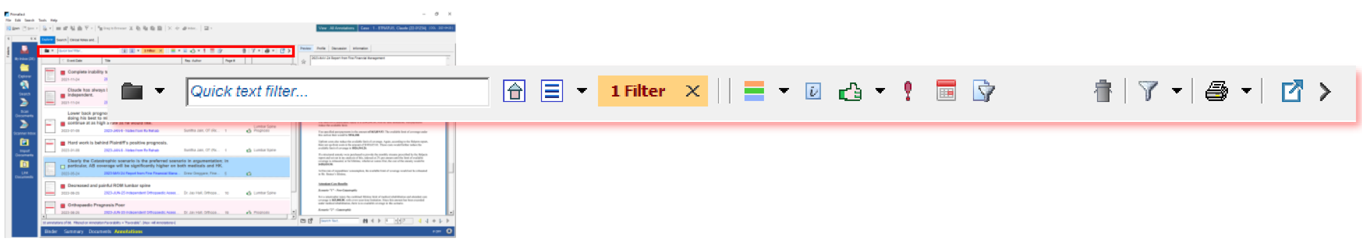
Filters may be applied cumulatively, allowing you to filter by any or all filter categories at a time.

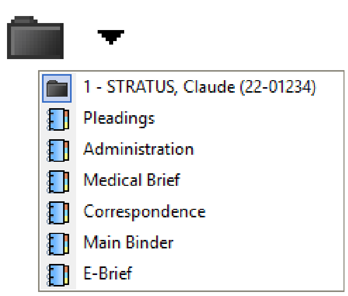
HOW FILTERS ARE AGGREGATED: Primafact applies "and" coding for multiple coding values: *e.g. selecting Pink Annotation Color and Favorable: Displays results with BOTH values (must be coded pink and favorable)*

Multiple selections within a coding variable (e.g. annotation color) – will be an "or" selection, identifying annotations coded with *any* of the selected colors within that variable.

Annotations Toolbar

The Annotations toolbar features a number of tools to help filter and review annotations.





The **Case Dropdown** allows you to display all annotations in a Case or display only annotations found in the selected binder

The **Quick Text Filter** filters to annotations including your specified text. Note only fields appearing on your List will be searched. (For example you might be looking for "Lee," a Report Author. If Report Author is not a displayed field on your list, this annotation will not be identified.

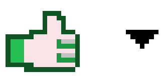
NOTE the Annotation List Quick Text Filter only searches Annotation Content, and not text in the associated document.

The **Home View** button returns you to your default Annotation Home List View

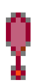
The **Saved Views** button allows you to instantly switch your list view screen to the format of a Saved View, or to save and format new views

The Annotation Color Dropdown Filter allows you to filter to annotations coded by selected color(s)

The **Issue** filter allows you to filter to select Annotation Issues



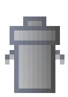
The **Favorability** dropdown allows you to filter to annotations coded with adversarial values



The **Importance** filter allow you to filter to annotations marked Important

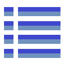
The Date filter allows you to filter by **Annotation Event Date** (Including Before and after the Date of Loss assigned to your Case)

The **Current Document** button filters to display only other annotations on the same document as your selected annotation

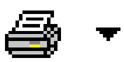


The **Trash** button deletes your selected annotation(s). ***NOTE: You can't restore deleted annotations.***

The Additional **Filters** dropdown allows you to filter and group your displayed annotations by a number of additional attributes, including Binder and Tab location

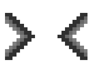


The **Grouping** icon (beneath the filter) features a dropdown that allows you to sort the displayed annotations in groupings such as Color, Document or Author. To clear the sort, select "**No Grouping**." The dropdown menu also includes expand and collapse icons that you can use to expand and collapse all displayed groupings.



The **Export** button lets you export lists to Word, Outlook and Excel and other formats

This button pops out your list into a separate Primafact window.



Hide/Show Preview will reveal or remove the document preview pane from the Binder View.

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.

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

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

VIDEO TUTORIAL: Create a Case Chronology

WATCH VIDEO

Watch our video tutorial for tips on creating your own Case Chronology annotation list view.

Start with 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.

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.

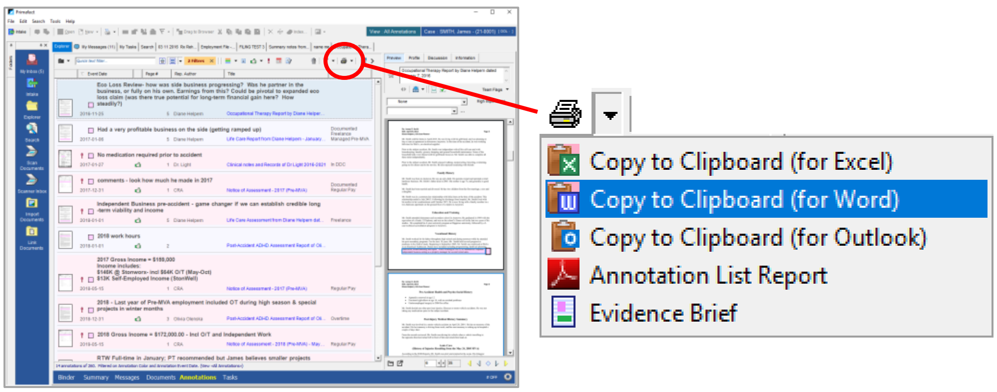
Exporting Lists & Reports

You can export a list to preserve or share your report, in various formats. For a static easily-shared list, Word and Outlook are often preferred, while Excel is recommended for users who will be extensively manipulating these exported lists. The Evidence Brief assembles a PDF of all pages appearing in the List along with the associated annotation, for context.

Export to Word

To export your displayed Annotation List to a Word table

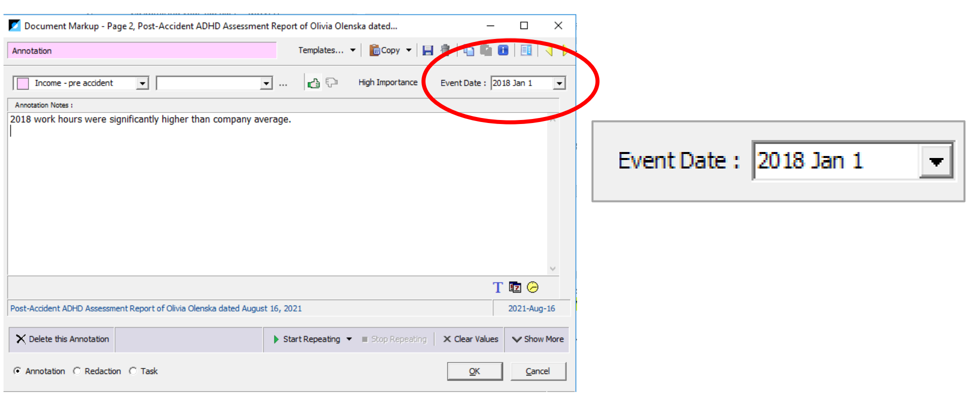
1. **Click** the Report Dropdown and select Copy to Clipboard (for Word)



2. **Paste** into your Word document.

Create a Chronology

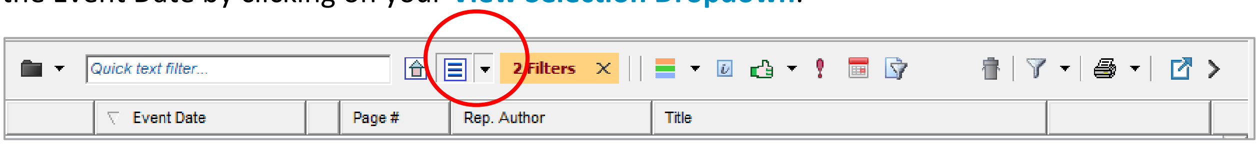
Assembling an Event chronology requires the Event field to be completed on your Annotation forms. Event chronologies use the date in this field to sort by date.



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.*

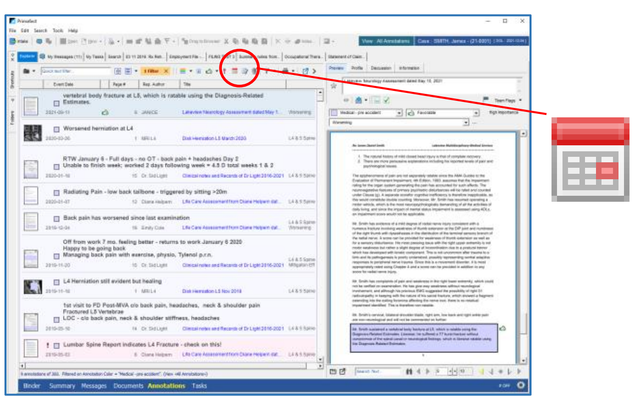
To export your chronology to Word use the ***Report Dropdown***, as detailed in *Export to Word*.

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.

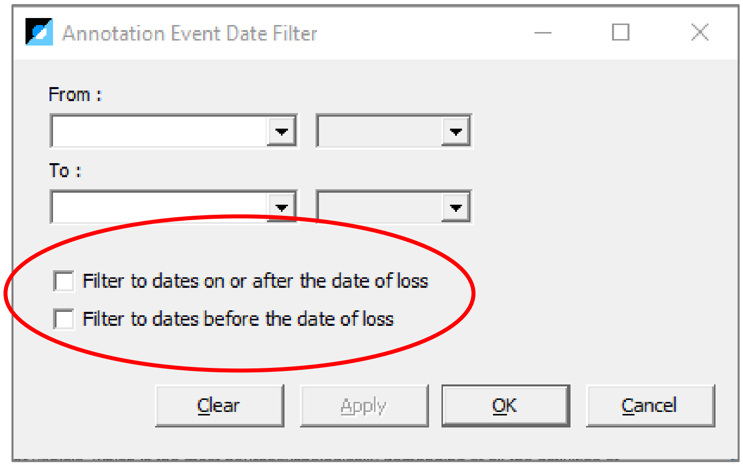
To filter a List by Date of Loss:

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:



One benefit of customizing Annotation List views is precise control over the appearance and order of exported reports and chronologies.

4. Click OK to apply filter and close dialog.

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.

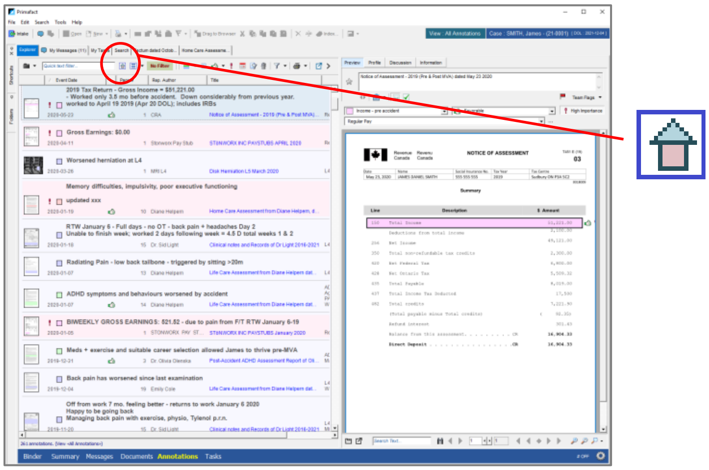
VIDEO TUTORIAL: Saved List Views

WATCH VIDEO

Watch our video tutorial on creating Saved List Views.

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.

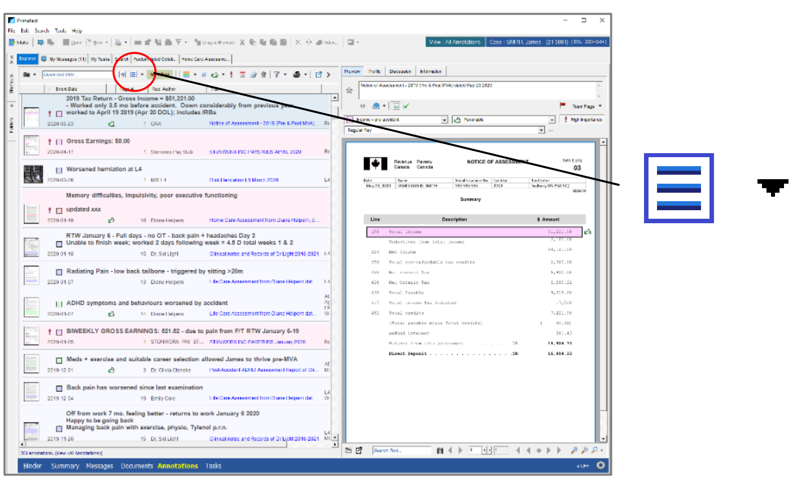


To change your Home View see *Change Your Default Home View*, below.

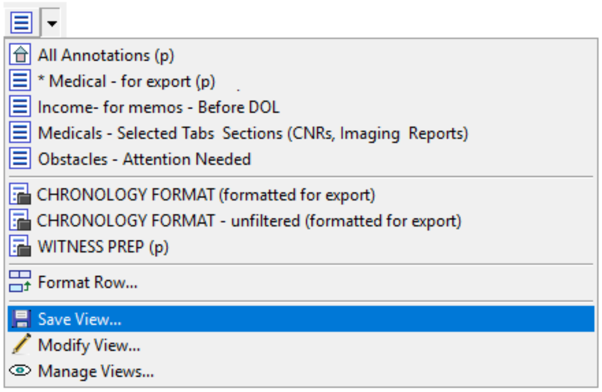
Creating a New View

You can create custom views to display your lists with your preferred fields, formatting, filters and sort tools.

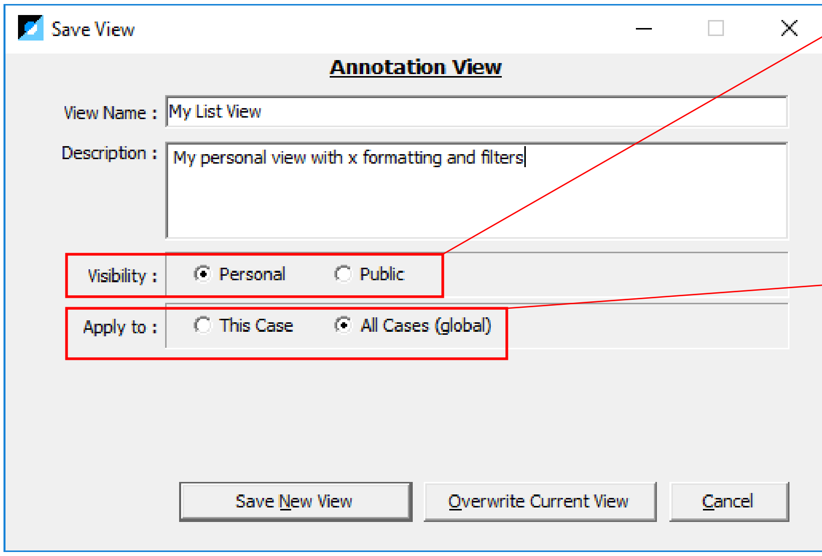
1. To avoid overwriting an existing view, start by saving your new view. Click the View Dropdown on your list toolbar:



2. Click **Save View**.


All Annotations (p)
* Medical - for export (p)
Income- for memos - Before DOL
Medicals - Selected Tabs Sections (CNRs, Imaging Reports)
Obstacles - Attention Needed
CHRONOLOGY FORMAT (formatted for export)
CHRONOLOGY FORMAT - unfiltered (formatted for export)
WITNESS PREP (p)
Format Row...
Save View...
Modify View...
Manage Views...

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



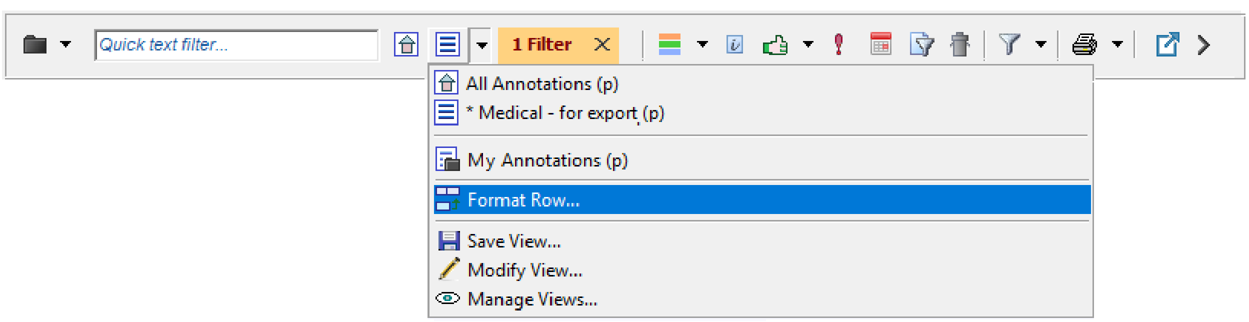
Visibility: Click Personal if you are creating the view for yourself or Public if you wish to create a view for other users.

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)

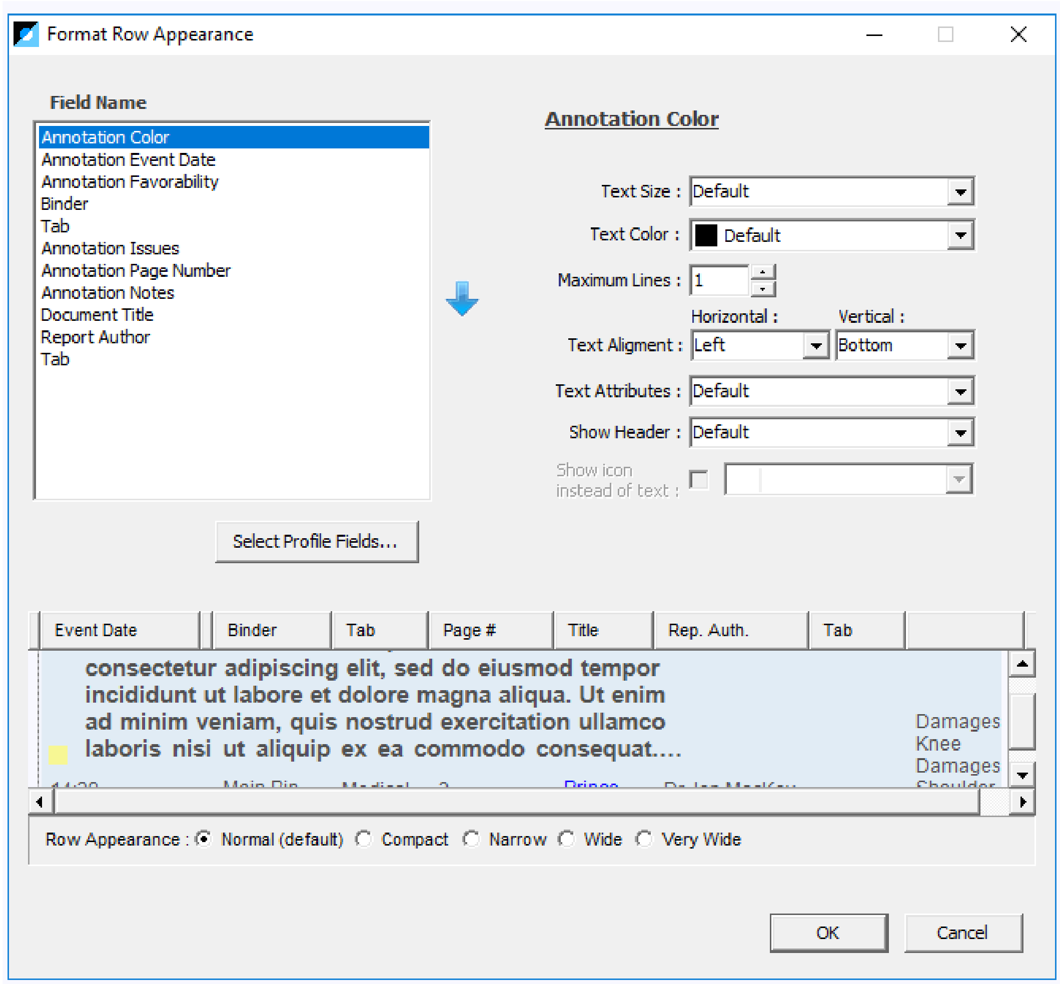
You can complete this step once you have finished creating your View, but doing this step first helps to preserve existing Views without unintentionally changing existing settings.

Formatting your View:

1. To format your current view, click the ***View*** dropdown on your List toolbar and select Format View.

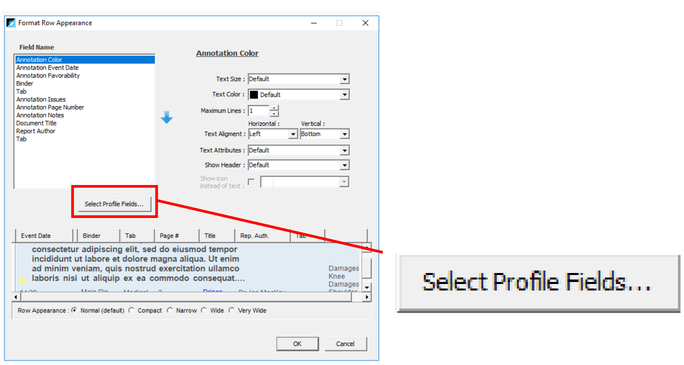


2. The *Format Row Appearance* dialog will open.



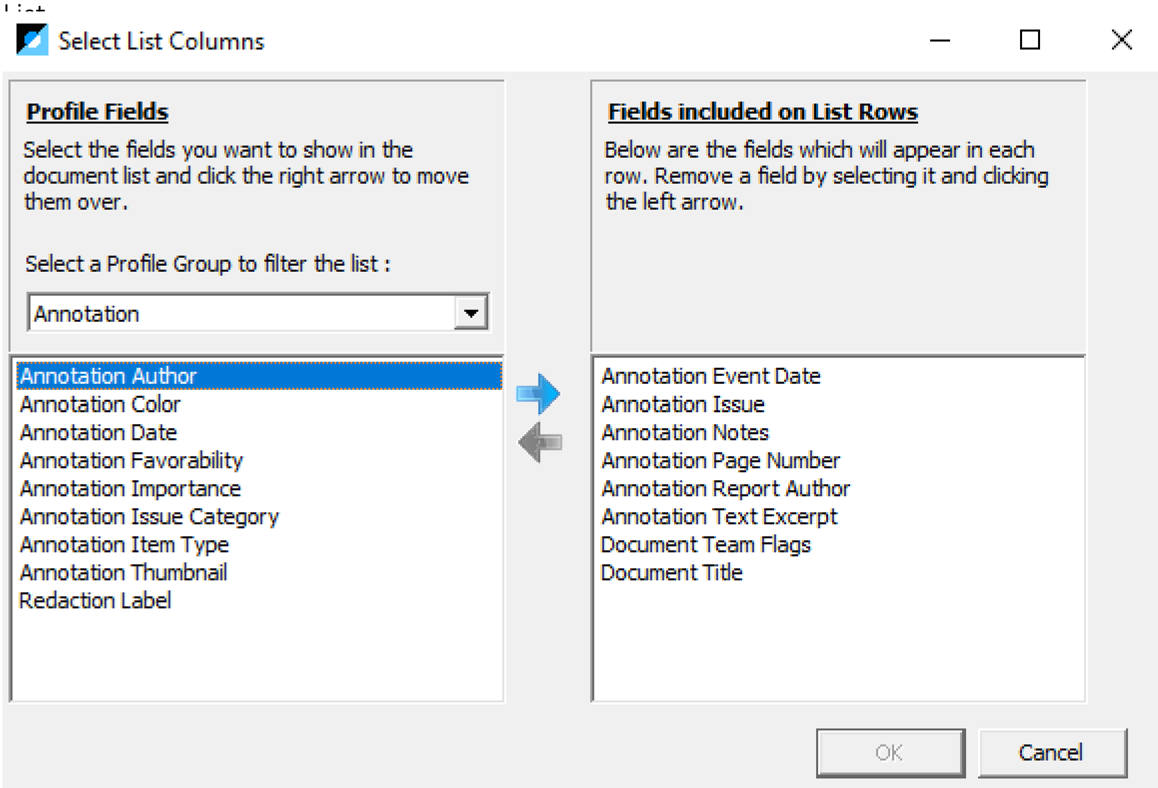
This is where you can specify which fields appear on your list, the order of your list columns, and row formatting (size, color *etc*.)

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.

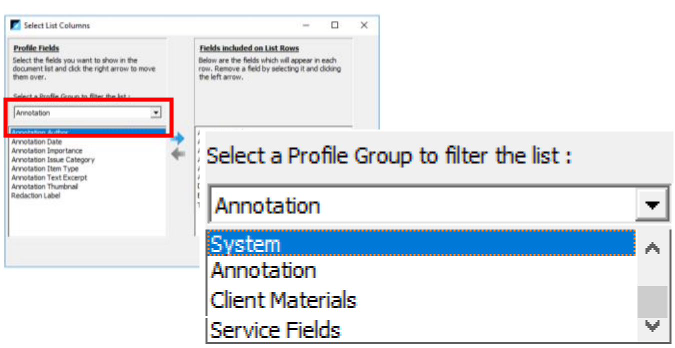


4. **The Select List Columns** dialog will open.

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:*

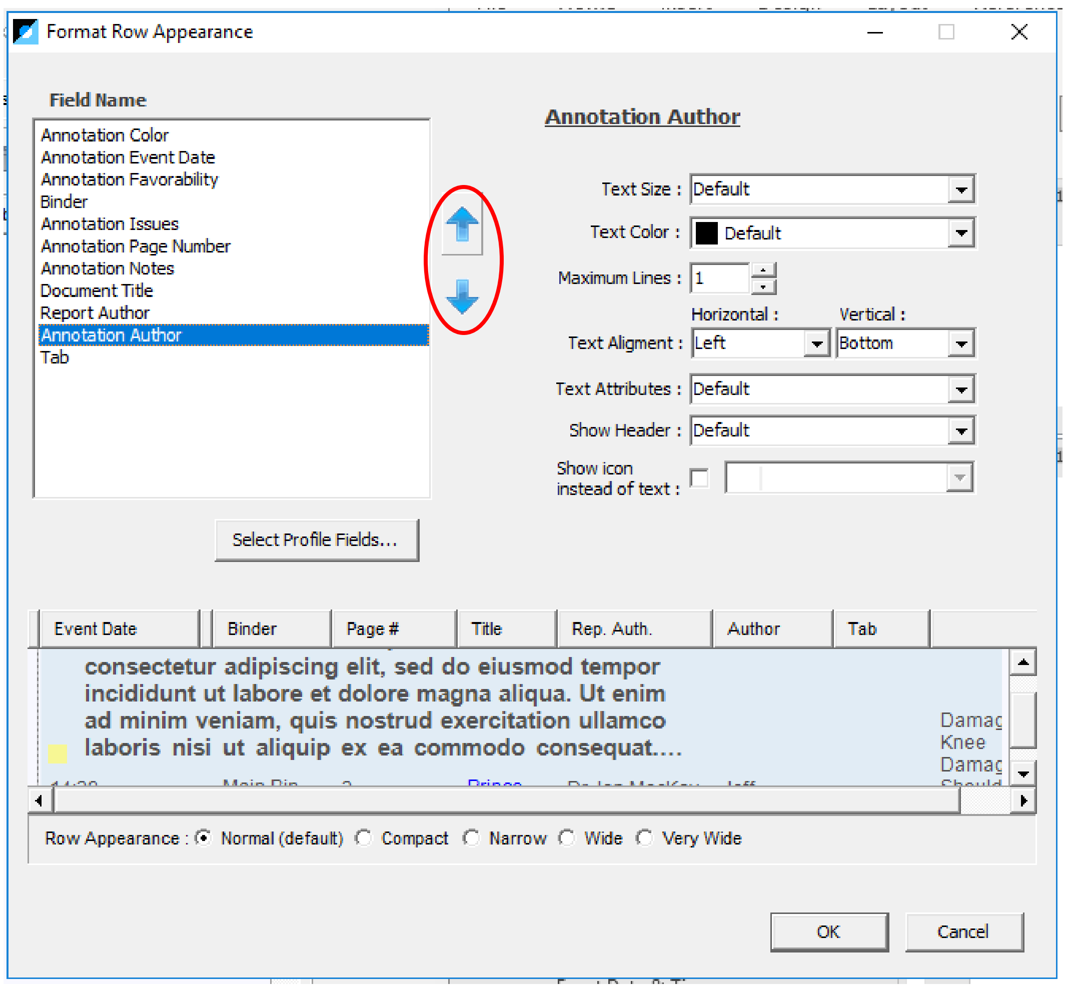


TIP: *If you are creating a view for export to Word, keep in mind the number of columns that will comfortably fit on your page when adding columns to your view*

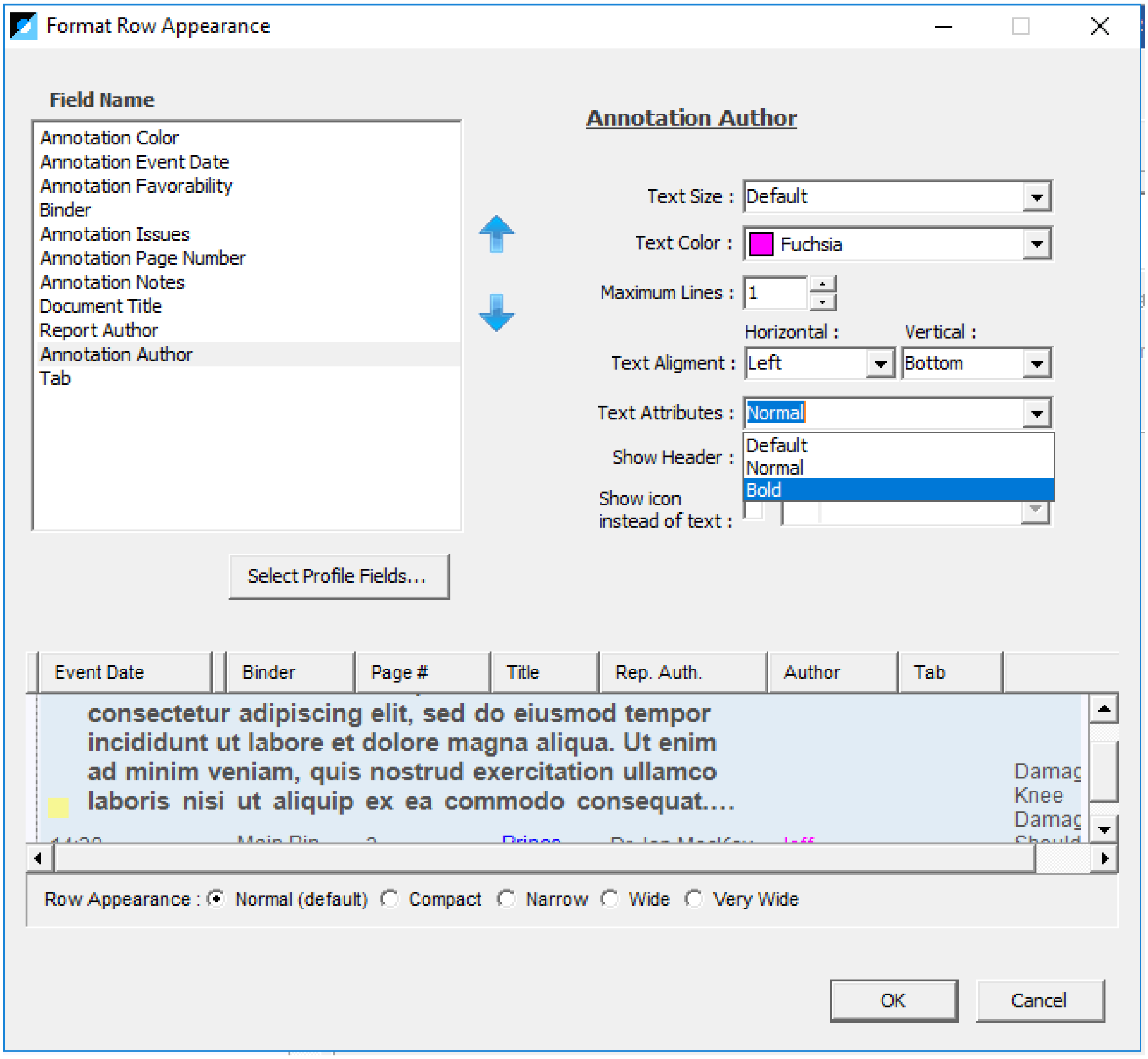
6. Once you have selected your fields, click OK.

   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.*

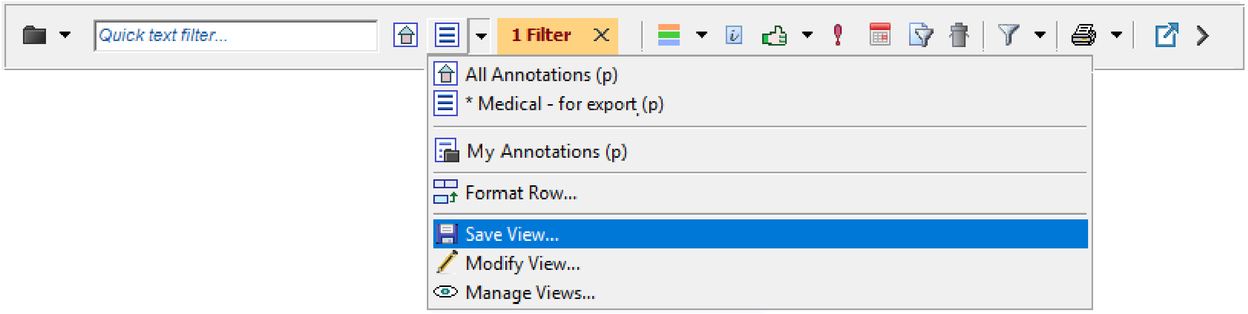
7. Next, on the ***Format Row Appearance*** dialog, use the blue up and down arrows to position your fields in the desired position on your list – items from top to bottom are displayed from left to right on your list.



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:

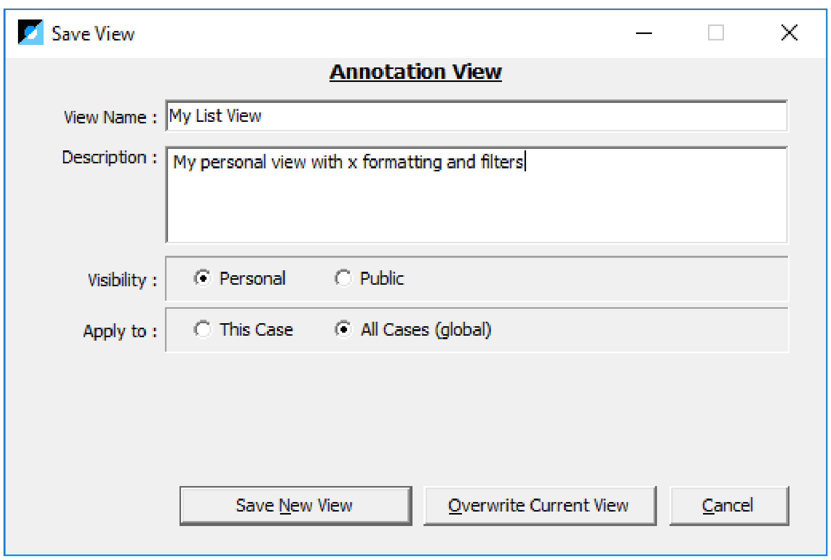


Save your View.



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

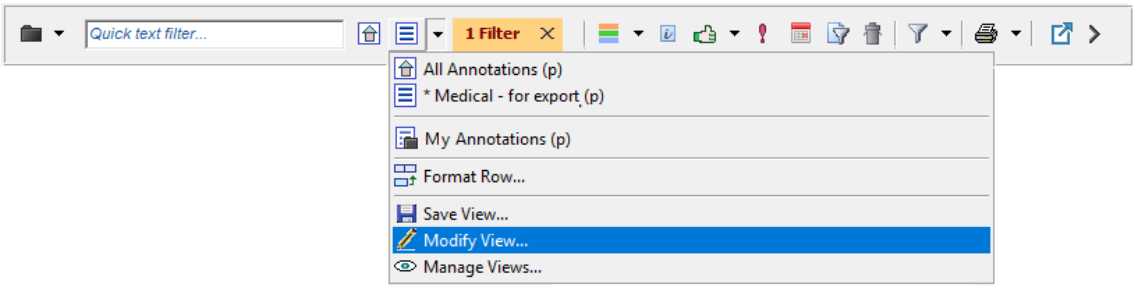
   If you are saving a New view, name and save as a New View, completing the Visibility and Apply to fields.



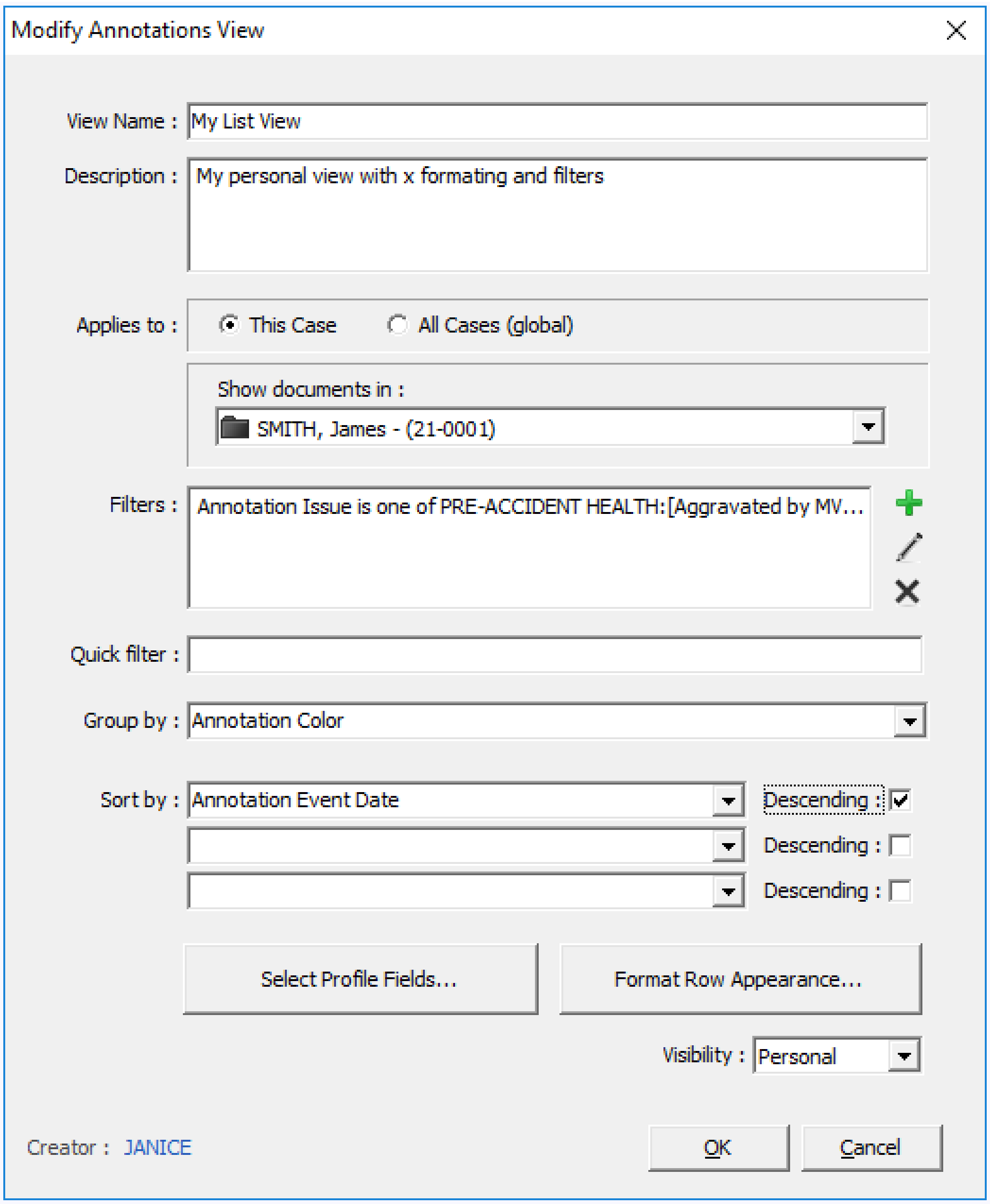
Additional View Formatting – Sort Order, Groupings and Filters

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.*

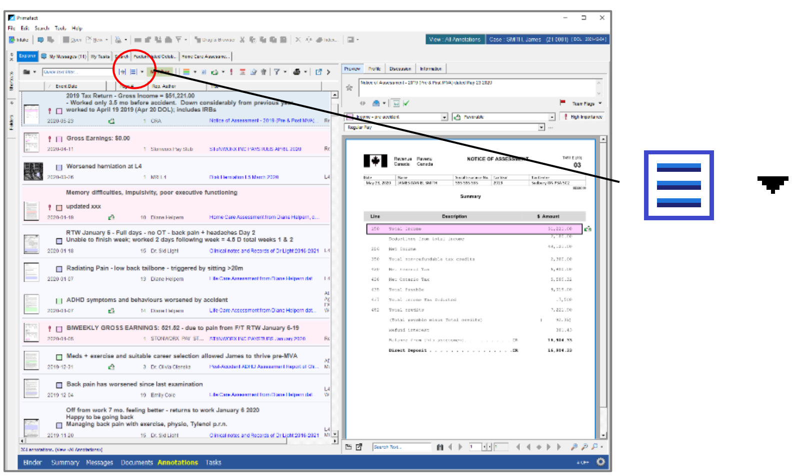
4. Click OK to apply and Save your settings to your Saved View.

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.*

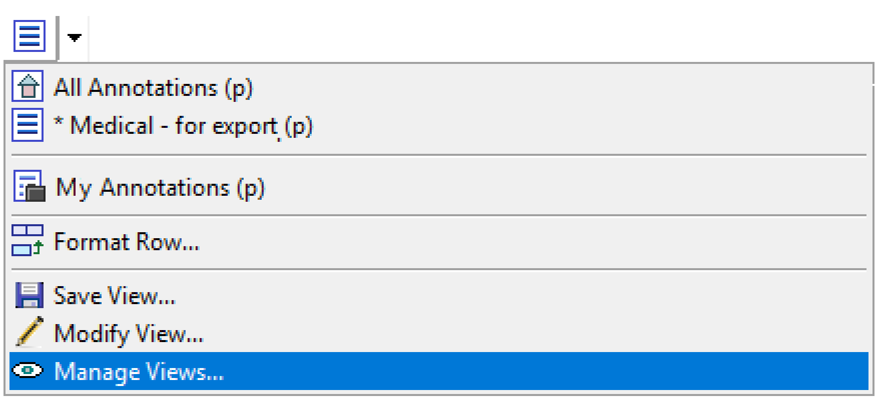
Change your Default Home View

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.

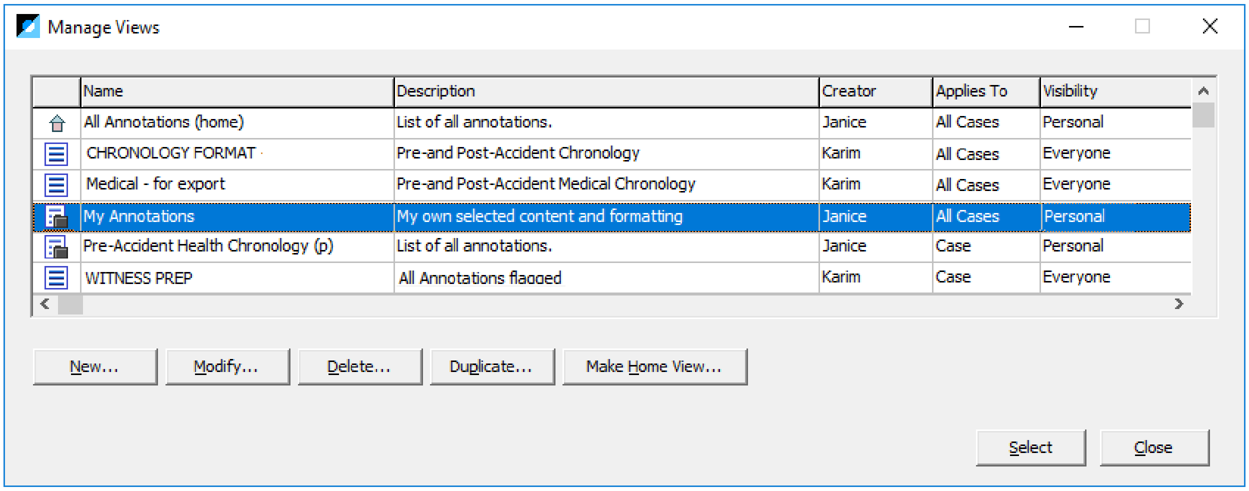
1. Click the View Dropdown on your list toolbar:

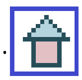


2. Select Manage Views.



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.

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)

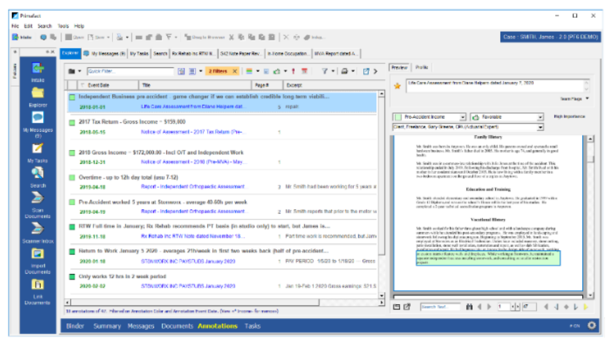
You can update:

✓ 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, and by default most users are restricted from using this feature unless specifically enabled.

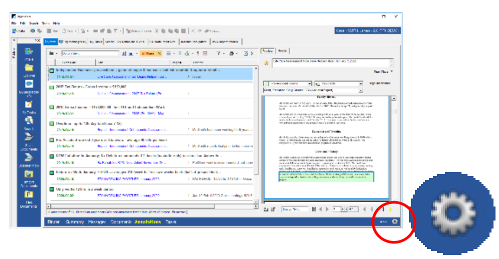
To perform a batch update:

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):

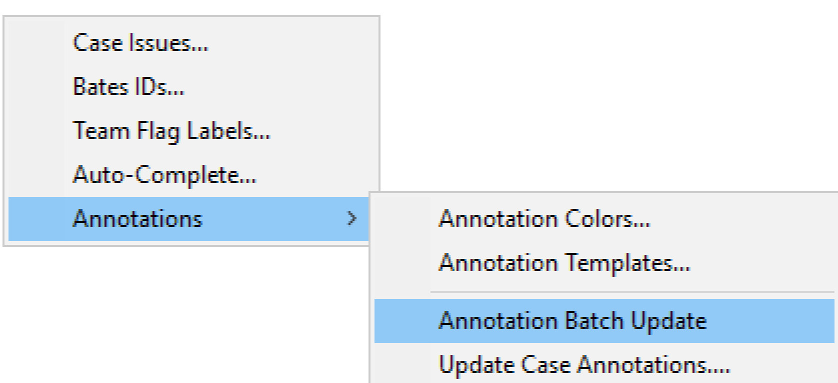


2. Optional: Select specific annotions from this list (if desired).

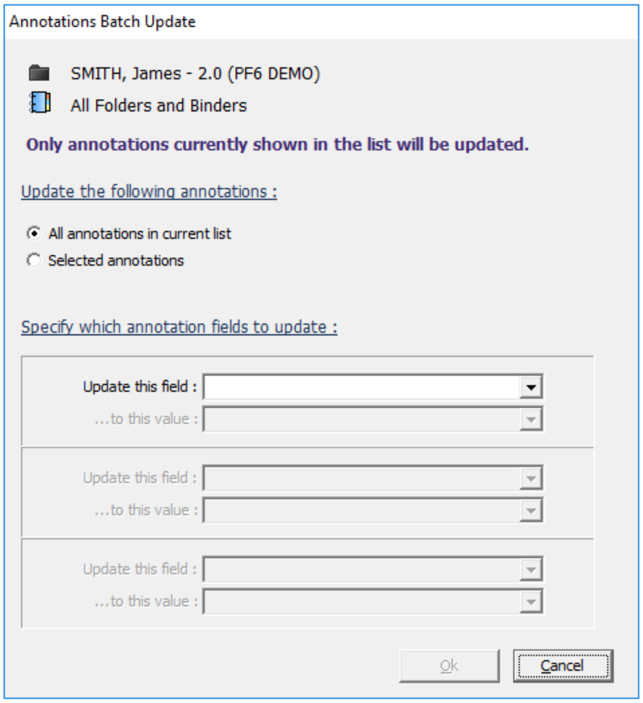
3. Click the Gear icon on the bottom-right corner of the Annotation screen:



4. Select Annotations > Annotation Batch Update



5. The Annotations Batch Update will appear.

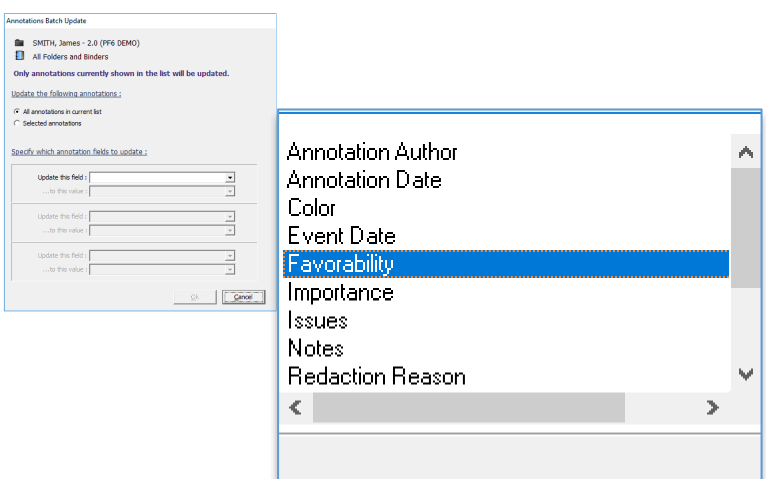


6. Choose which annotations you wish to update:

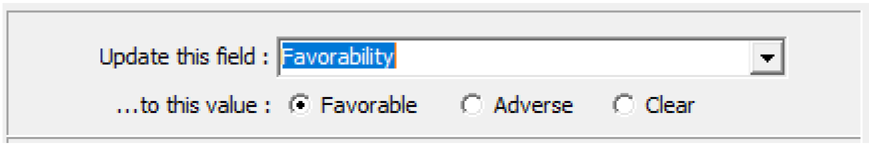
   a. "***All annotations in current list***" means all annotations in your current view, which may be filtered

   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).

Assembling Productions

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

- ✓ **Binder Index** Copying or printing binder indexes makes it easy to preserve a record of binder content, and can make it easy to create Indexes and Affidavits of Documents in MS Word.
- ✓ **Binder Page Numbering** - Allows page numbering to be applied to entire Binders, Tabs, or Sections in a single operation. Numbering is dynamic, so if content is moved, numbering adjusts to reflect changes.
- ✓ **Stamps** - Allows you to apply headers, footers and watermarks to individual documents. Stamps are static until changed. You can adjust when a stamp is published in the stamp settings.
- ✓ **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 citations

  - 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

- ✓ **Bates IDs** - Allows teams to assign persistent identifiers to individual pages in a Case. Applied to full documents, or multiple documents at a time.

Setting Up Your Productions

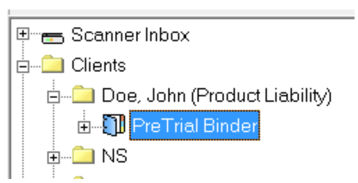
Copy Binder Index

Primafact makes it easy to create an Index of documents, such as an Affidavit of Documents or List of Documents for use in Word.

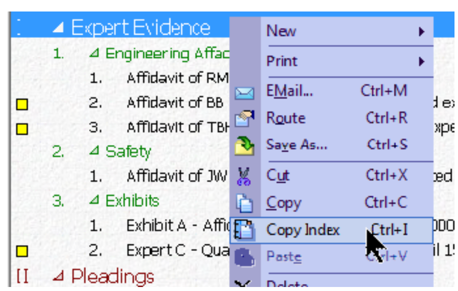
To copy a Binder Index:

1. Select the desired binder in the Explorer View.

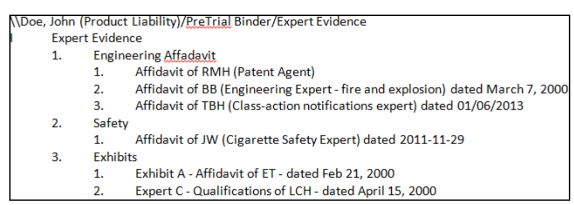
   You can also select a tab or section in a binder to copy the index from.



2. Right-click anywhere in the binder and select Copy Index. This copies the binder index as unformatted text to the Windows clipboard.



3. Start a new document in Word and paste the text. You can then edit as required.

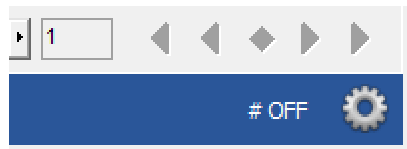

\\Doe, John (Product Liability)/PreTrial Binder/Expert Evidence
Expert Evidence
1. Engineering Affadavit
1. Affidavit of RMH (Patent Agent)
2. Affidavit of BB (Engineering Expert - fire and explosion) dated March 7, 2000
3. Affidavit of TBH (Class-action notifications expert) dated 01/06/2013
2. Safety
1. Affidavit of JW (Cigarette Safety Expert) dated 2011-11-29
3. Exhibits
1. Exhibit A - Affidavit of ET - dated Feb 21, 2000
2. Expert C - Qualifications of LCH - dated April 15, 2000

Binder Page Numbering

Page Numbering allows you to quickly and easily number **all** documents in a selected binder or tab continuously from 1 on the first page of the first document the last page of the final document. (You may exclude documents from being numbered, but cannot selectively number pages using this feature.)

When activated, page numbering is applied to all documents within a binder (except documents you exclude), and is dynamically updated as documents are added, removed or reorganized within a binder.

Numbering is displayed as **#ON** or **#OFF** in the blue bottom ribbon of your binder.



All edits to Page Numbering are saved and take effect immediately.

Managing Page Numbers

You have a number of options for numbering your binders:

- **Restart numbers on each document**

  This starts each document at Page 1

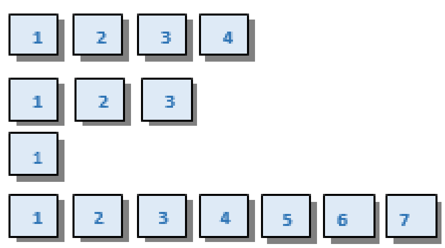
  e.g. In a 4-document tab with Document 1 (4pp) Document 2 (3pp), Document 3 (1p) Document 4 (7 pp) the pages would be numbered as:

Doc 1: Pages 1-4

Doc 2: Pages 5-7

Doc 3: Page 8

Doc 4: Pages 9-18



- **Number tab from top to bottom**

  This numbers each document within a Primafact ***tab*** starting at Page 1 of the first document, continuing without interruption across documents.

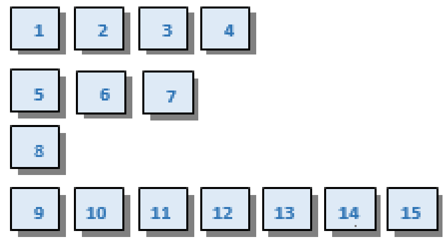
  e.g. In a 4-document tab with Document 1 (4pp) Document 2 (3pp), Document 3 (1p) Document 4 (7 pp) the pages would be numbered as:

Doc 1: Pages 1-4

Doc 2: Pages 5-7

Doc 3: Page 8

Doc 4: Pages 9-18



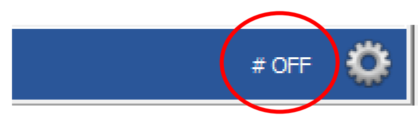
- **Restart numbers on each section**

  This numbers each document within a Primafact ***section*** starting at Page 1 of the first document, continuing without interruption across documents, similarly to "Number tab from top to bottom".

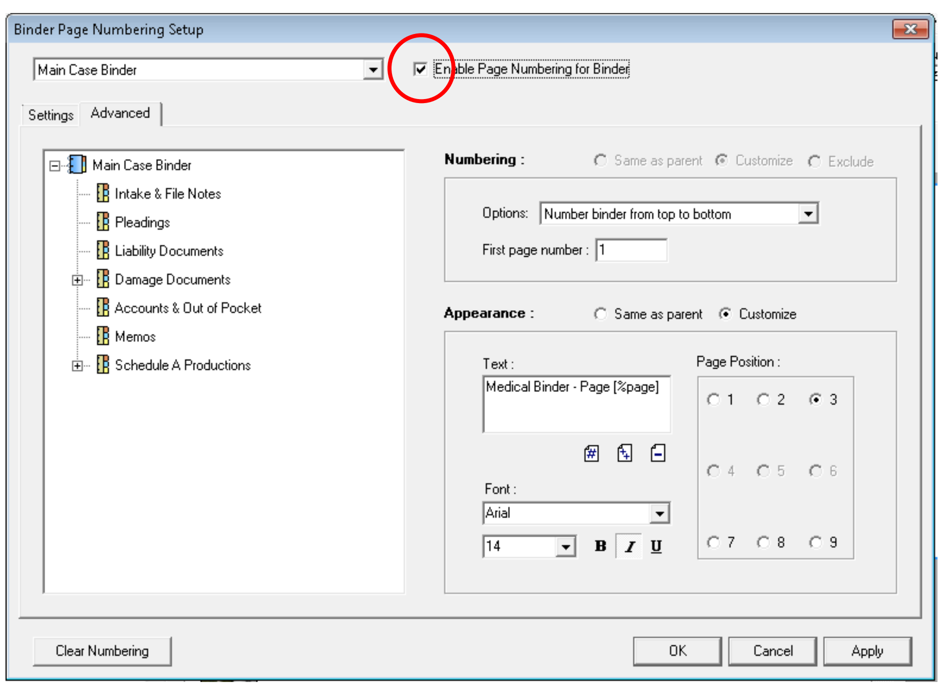
  However, with this option, ***numbering restarts at Page 1 on the next section***.

Turning Page Numbering On

Page numbering can quickly be turned on by clicking the numbering area at the far right of the blue bottom navigation ribbon. (If numbering has not been turned on, you will click **# OFF** to open the Page Numbering Setup window).



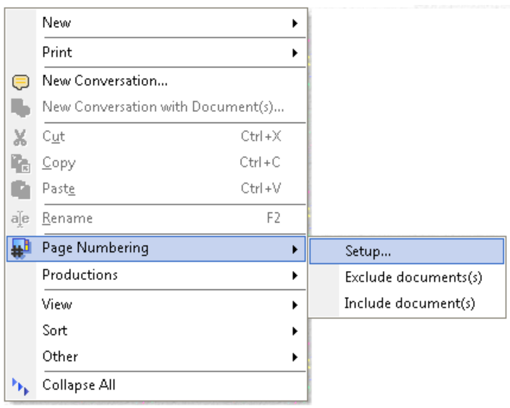
1. This will bring up the **Binder Page Numbering Setup** Window.



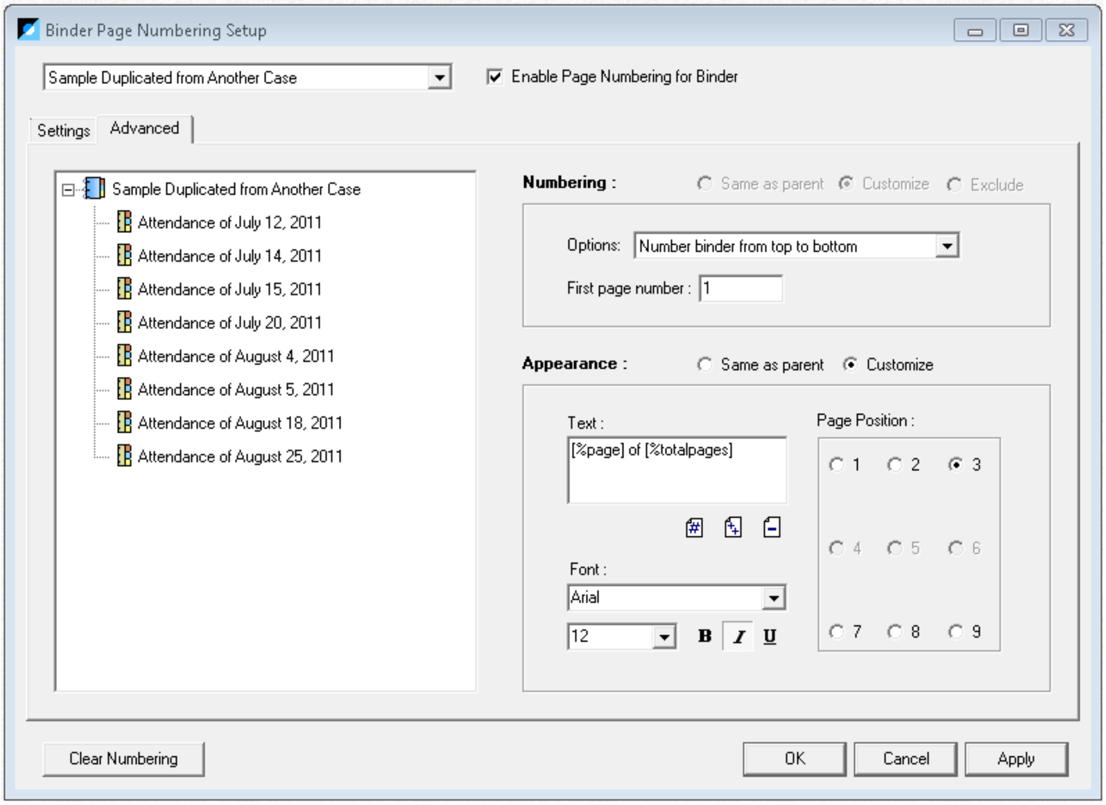
2. Select (Click) the **Enable Page Numbering for Binder** checkbox. Click **OK.**

Applying Page Numbers to a Binder

1. Open the Binder Page Numbering Dialog by right-clicking in the binder and selecting **Page Numbering > Setup**.



2. Select the Advanced tab on the **Binder Page Numbering Setup** dialog.

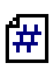
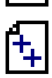


3. Click the **Enable Page Numbering for Binder** checkbox.

4. Select the Numbering Option from the Options dropdown (*See Managing Page Numbers,* above, for an explanation of how these selections work)

5. Below Options, select the page where your page numbering should begin.

6. In the appearance area, enter your text, including desired auto text fields:

 Page Number
 Number of Pages
 Document Title

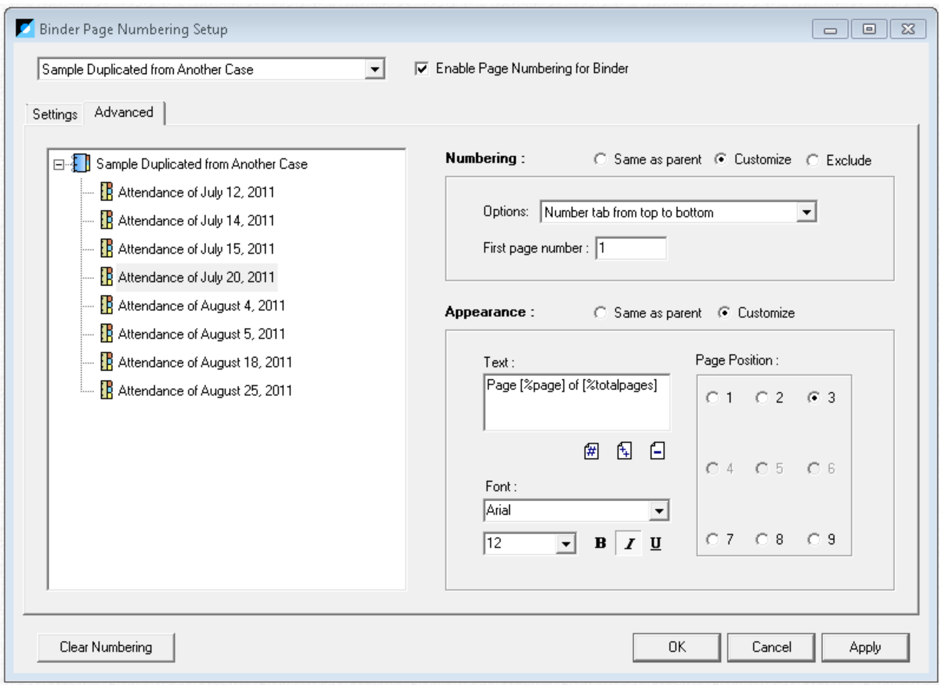
7. Select the Position in the Page Position Area (the buttons indicate the location on the page where the number will be displayed - #3 is top right, for example.

8. Select your preferred font and font size in the Font area.

9. Select **Apply** and **OK to** stamp your document.

Separately numbering a Tab

1. On the Advanced tab on the **Binder Page Numbering Setup** dialog, select the desired Tab:



2. Select the **Customize** button in the numbering area.
3. Select desired page numbering configuration described in [*Applying Page Numbers to a Binder*](), *above.*
4. You may use the same Parent appearance, or adjust the appearance of your numbering by selecting **Customize** in the Appearance Area.
5. Click **OK** to apply your number stamp.

Excluding Pages from Being Numbered

Primafact will allow you to select specific documents from a binder, and exclude them being automatically numbered.

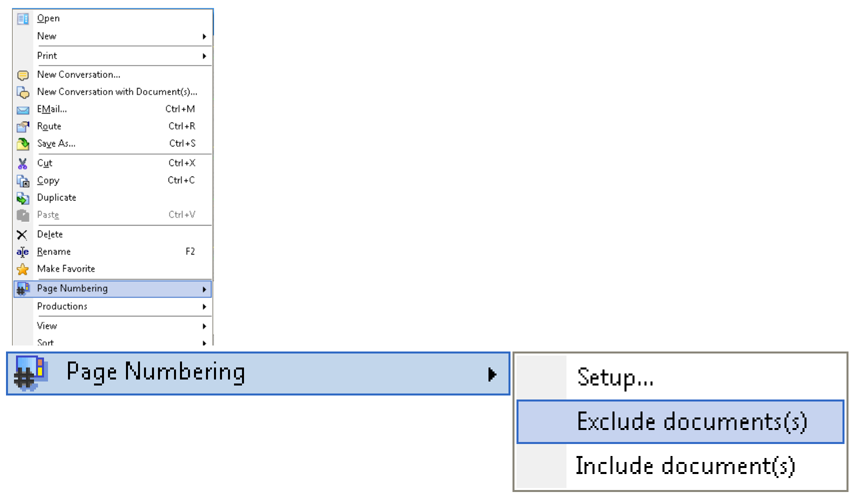
Keep in mind that the total number of pages in the document will not be included in the total number of page of that document set. (It's like an invisibility cloak – the document is there, but the numbering system doesn't notice).

To exclude pages from being numbered:

1. Click on your selected document. (If you wish to select several, select these by pressing the **Ctrl** key as you make your selections.)

2. Right Click to bring up the drop-down menu.

3. Select **Page Numbering > Exclude Document(s)**.



To include previously excluded pages in your numbered document set

If you change your mind and decide a document should be included in the document set, you may bring it back in using steps similar to those detailed above:

1. Click on your selected document. (If you wish to select several, select these by pressing the Ctrl key as you make your selections.)
2. Right Click to bring up the drop-down menu.
3. Select Page Numbering > Include Document(s).

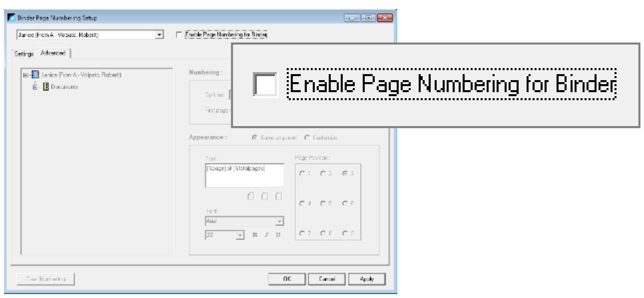
Turning Page Numbering Off

Page Numbering for any binder may be turned on or off at any time. Turning numbering OFF allows you to print or publish documents without numbering. You may turn on page numbering again at any time. The numbering will revert to the stamp setup previously created for the Binder (though this may be edited as desired.)

To turn off Page Numbering:

1. Click the **# ON** area in the blue bottom navigation ribbon.

2. Simply de-select (uncheck) the **Enable Page Numbering for Binder** checkbox on the Binder Page Numbering Setup Window. Click **OK**.



3. Page numbering will be temporarily disabled.

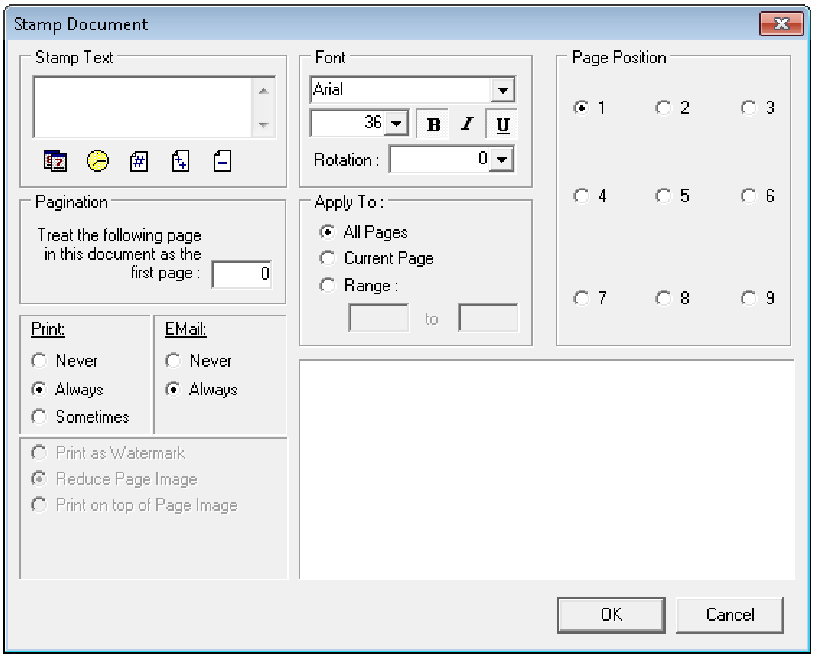
! ***NOTE: Turning Page Numbering Off is different from "Clear Numbering" (button at the bottom left-corner of the window), which will remove all the number formatting you have applied to the binder.***

Stamps

Stamping lets you include additional text information on Primafact documents without affecting the original images. A stamp can include information such as the document title, page numbers, and watermarks. Stamps may be located in a number of positions on the page, and on selected pages within a document.

Stamping a Document

Adding page numbers: Open a document and select the "Stamps" tab in the right pane. Click the "Add" button at the bottom. The Stamp Document dialog box will appear.



1. In the Stamp Text section, add the desired text. Icons beneath this area allow you to add fields such as Page Number and Document Name.
2. In the **Apply To** area, select your desired page range.
3. In the Font section choose your desired font, size and attributes.
4. Choose page position – each radio button corresponds to a location on the page. (Postion 1 is the top left corner of the page; Position 8 is centered at the bottom of the page.)
5. Determine Print and Email appearance. (Choosing “Never” for Email means the stamp will not appear if you email the document; stamping “Never” for Print means you will not be able to apply the stamp to printed documents, even if you select stamp printing in your printer dialog.)
6. Click **OK**.

Adding a Watermark

1. Select **Position 5** in the Page Position area to make the watermarking option available.
2. Rotate 310° to position your stamp diagonally across the page.
3. Your stamp text will appear as a transparent watermark image on your document page(s).

Deleting a Stamp

Select the stamp from the list in the Stamps tab and click on the Delete button.

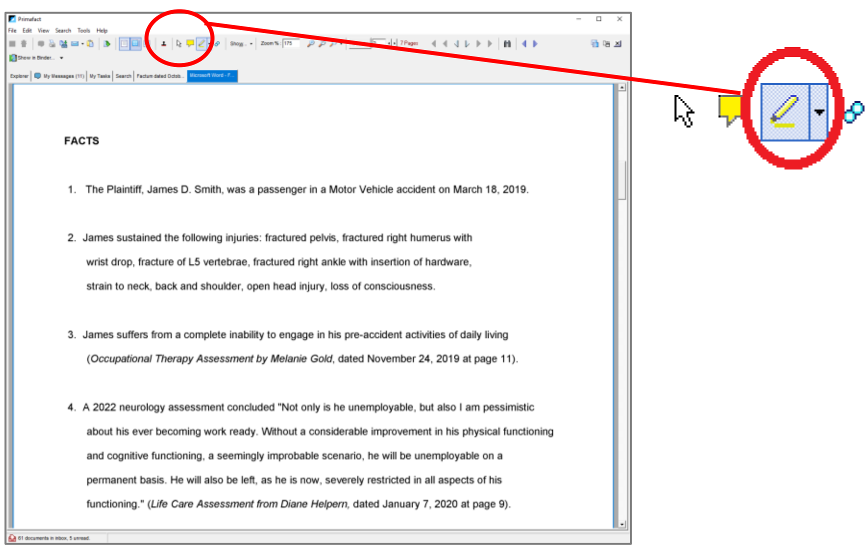
Adding Highlights

WATCH VIDEO

You can add highlights to your documents in Primafact 6 to call attention to key content. Highlights are a colored transparent overlay that can be exported along with documents shared in PDF format. You can elect to include or exclude highlights when exporting your documents as PDFs.

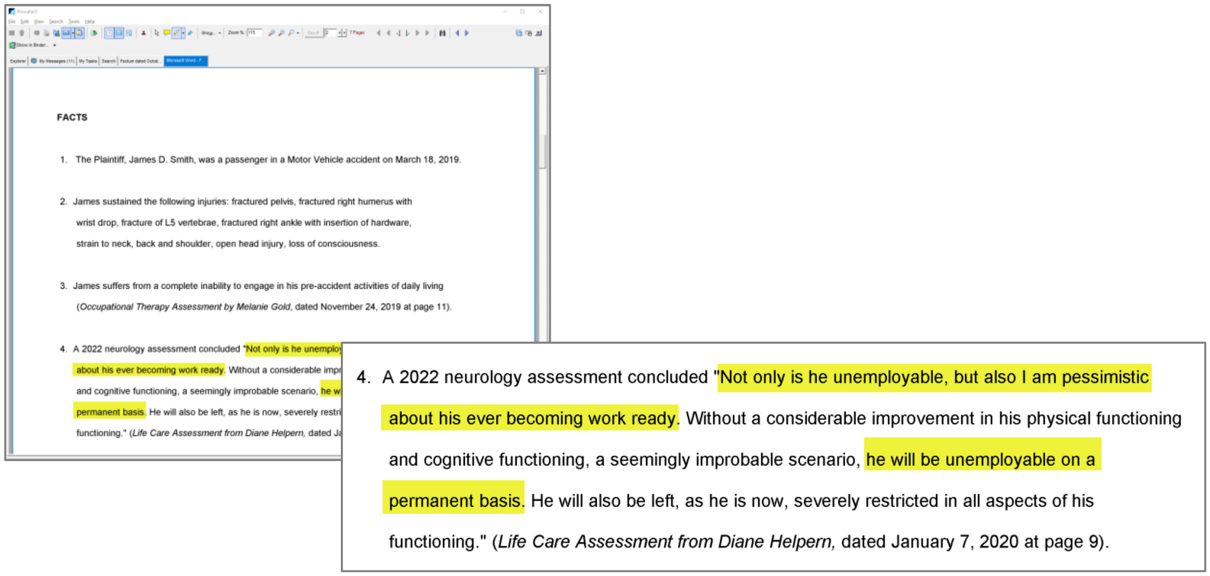
Using the highlighting tool to add a highlight:

1. Open your document.
2. Select the Highlight tool from the markup options on your toolbar.

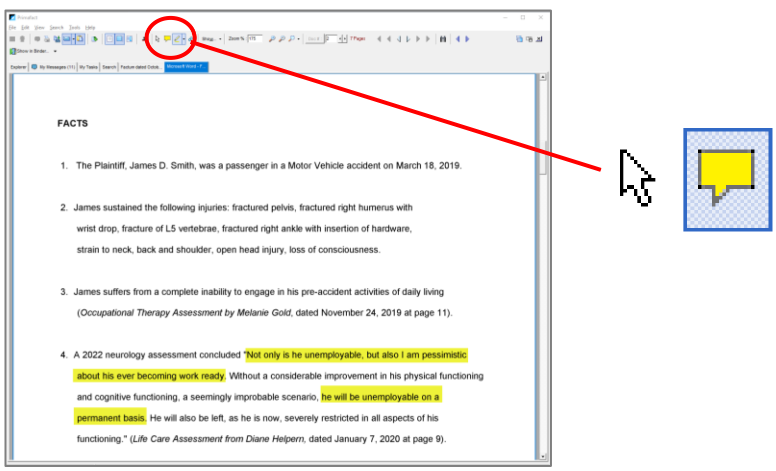


3. If desired, use the Highlighter dropdown to select a different highlight color.
4. The highlighter tool will appear.
5. Draw one or more boxes around the text you wish to highlight. (Highlight boxes can be selected and resized.)
6. Click to set highlight.

   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

WATCH VIDEO

You can add links to your Primafact documents to other Primafact document locations and to online resources outside Primafact. Links can be used within Primafact and included in PDF exports from Primafact.

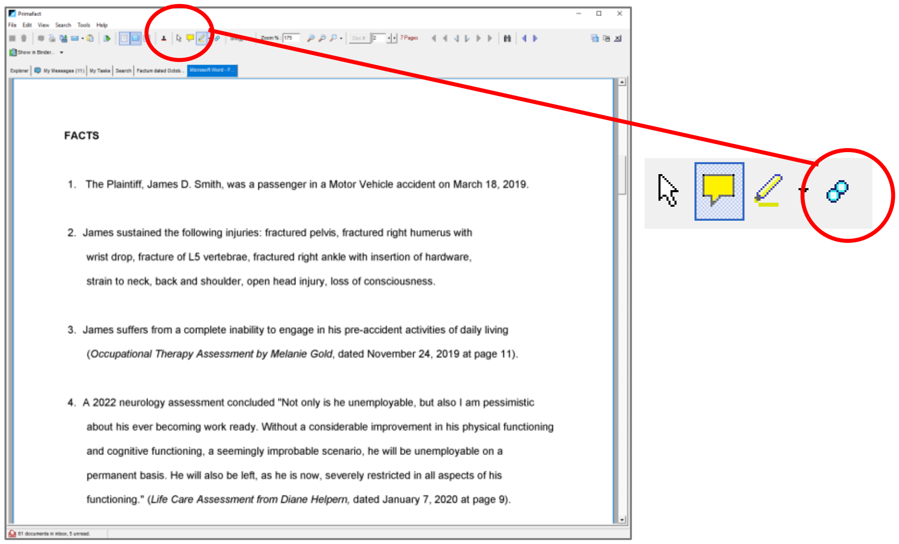
Links to Primafact documents only export if the linked documents are included in the exported document or bundle.

Links to Primafact document locations

Using the linking tool to add a link to a Primafact location:

1. Open your document on a Tab or separate window.

2. Select the Linking tool (the document markup setting defaults to “create annotation”).

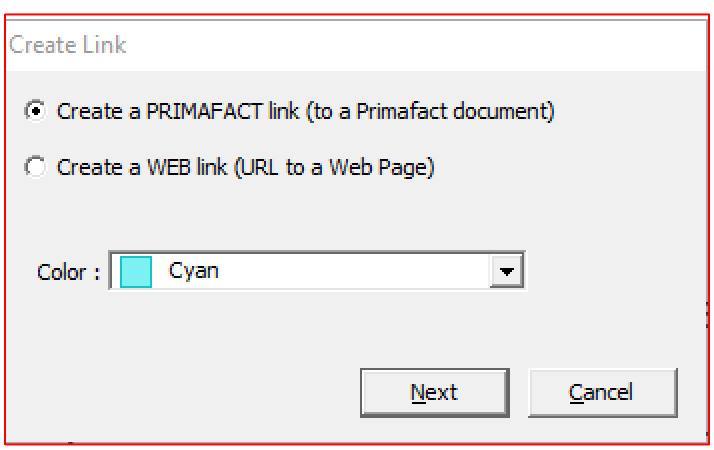


3. The link tool will appear.

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.

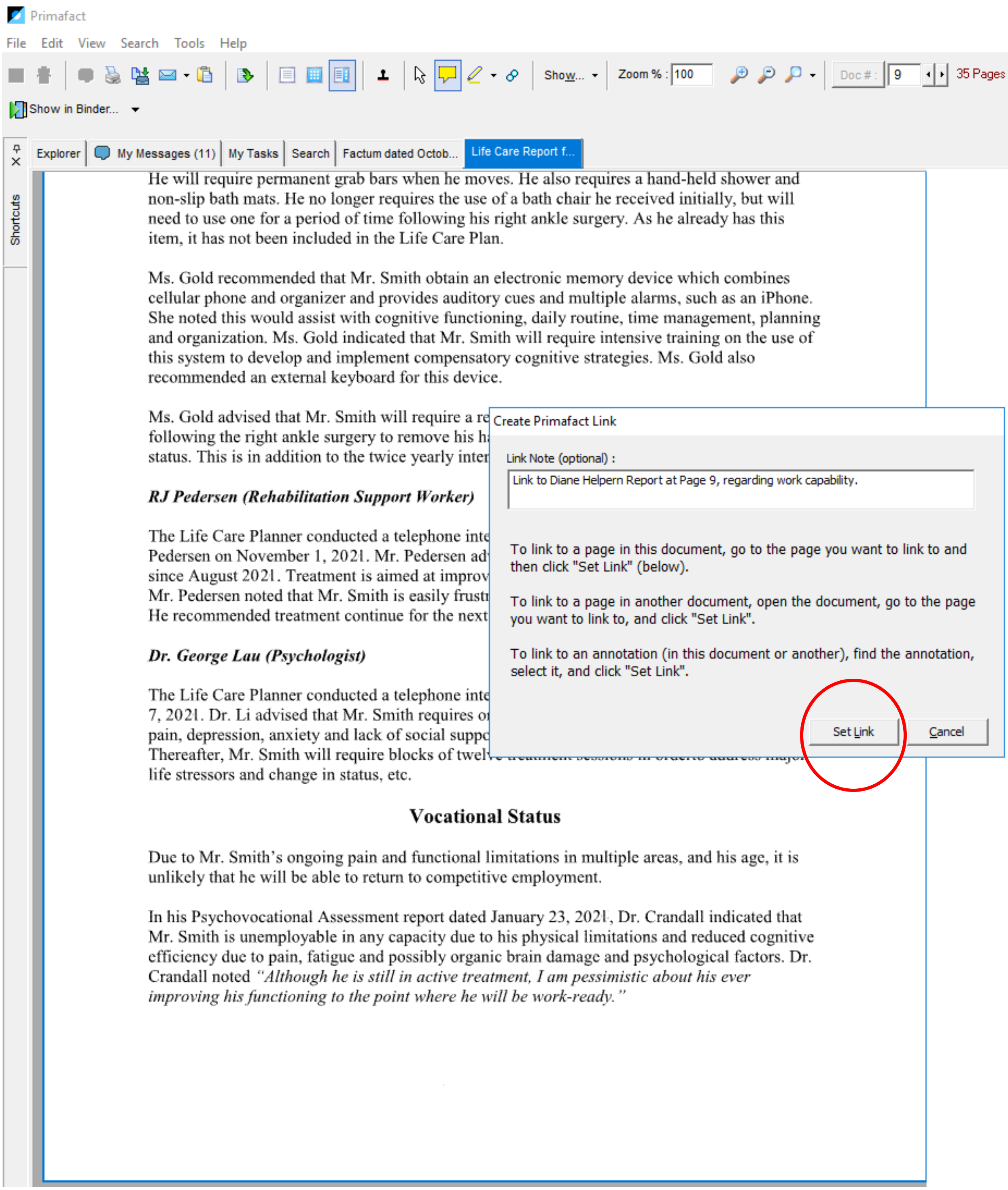


7. Click Next.

8. Add a link note if desired.

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

10. Click Set Link.



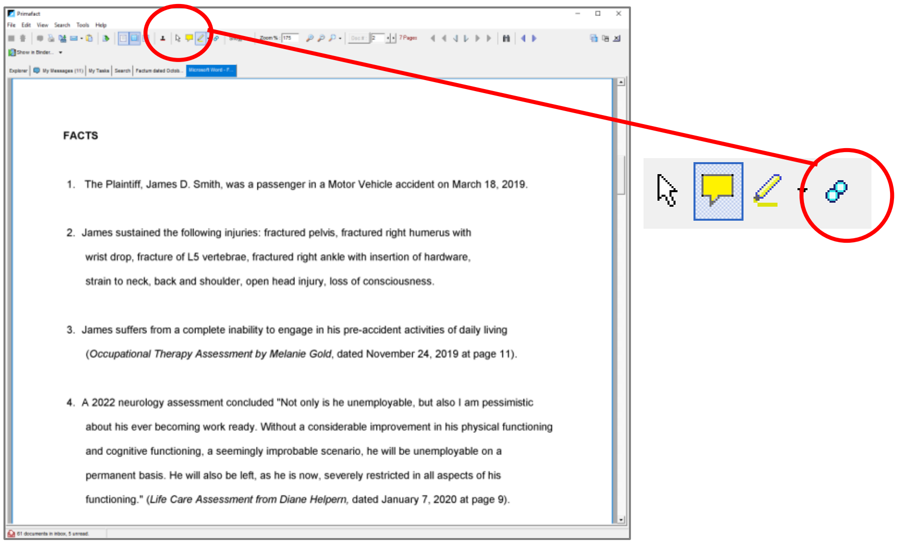
11. Link will be set to the specified Primafact location.

Links to online locations (Web Links)

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

1. Open your document on a Tab or separate window.

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

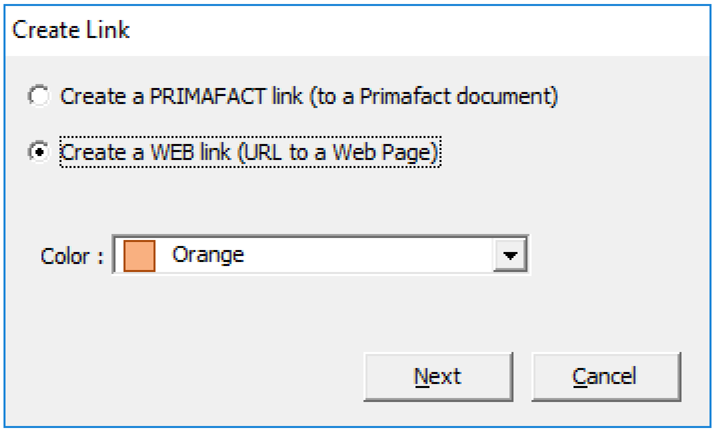


3. The link tool will appear.

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 Displayed in Primafact

You can show/hide markup when viewing documents in a Tab or separate window in Primafact. See *Adjusting Markup Display on a Document in Primafact* for details.

Bates IDs

Bates IDs assign a unique, static identifier to pages in a case. The purpose of Bates IDs is to uniquely identify pages for evidentiary purposes regardless of where they appear. Accordingly, the Bates IDs will be the same even when a document appears in multiple binders. Only one Bates ID may be applied to any page.

Bates IDs are applied at the document level (to all pages in a document) rather than on a page-by-page basis. If you merge Bates ID'd pages into a different documents, the Bates ID'd pages will retain their original Bates numbering. Because the Bates IDs are persistent, it is possible that Bates IDs will not appear sequentially in a document.

A file must be converted to a Case before Bates IDs can be used.

Setting Up Bates IDs

The default format of Bates IDs is a simple number that is unique across all documents in a case. (*e.g.* 000001). A Bates ID may only be used once in any Case.

For advanced number scenarios, it is possible to create multiple numbering sequences for a case that include prefixes. Bates IDs are unique within prefixes, so for example it is valid to have both a P-000030 and D-000030 page in a case. When applying a Bates ID a sequence must be selected. Only a single Bates ID can be applied to a page.

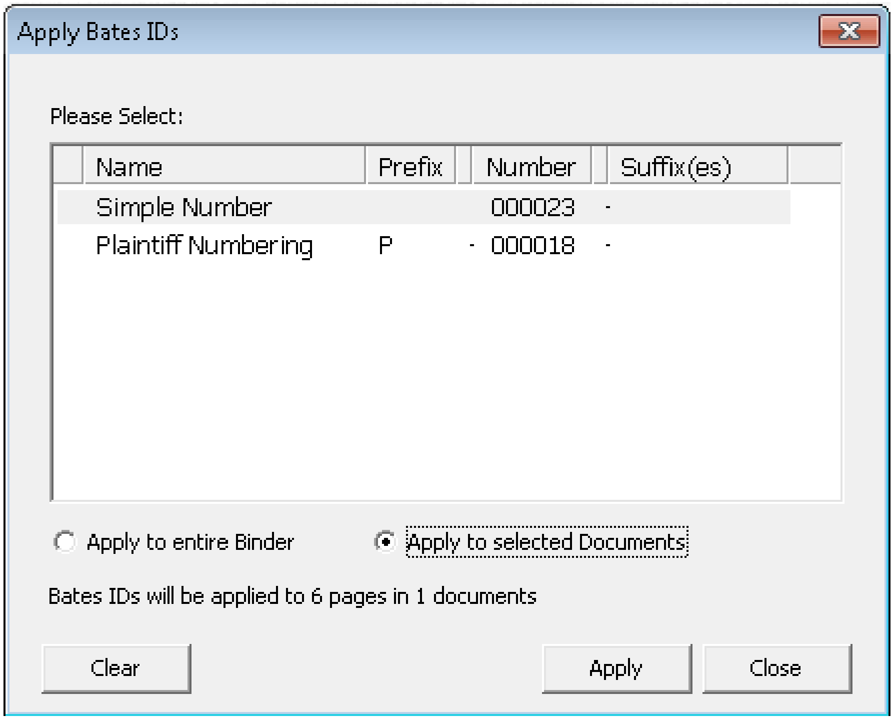
Bates IDs are not available in a case until they are set up.

Applying Bates IDs to Documents

Bates IDs may be applied to single documents, multiple documents, or full binders at one time. Each page will be assigned a unique, static Bates ID. You may not apply Bates IDs to single pages within a larger document, but you may move (merge) Bates ID'd pages to documents without Bates IDs on all pages.

To apply a Bates ID:

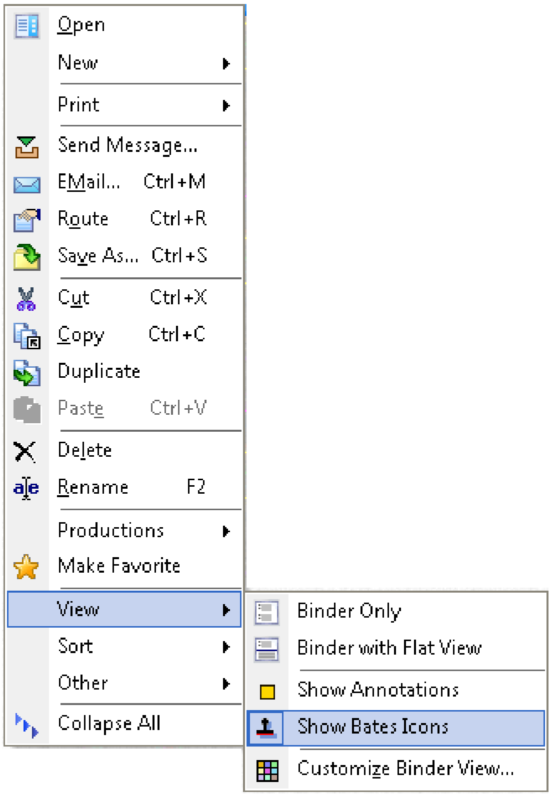
1. Within the Binder View, select your document(s), right-click and select **Productions > Bates ID's > Apply Bates IDs** from the drop-down menu.
2. The **Apply Bates IDs** window will open.



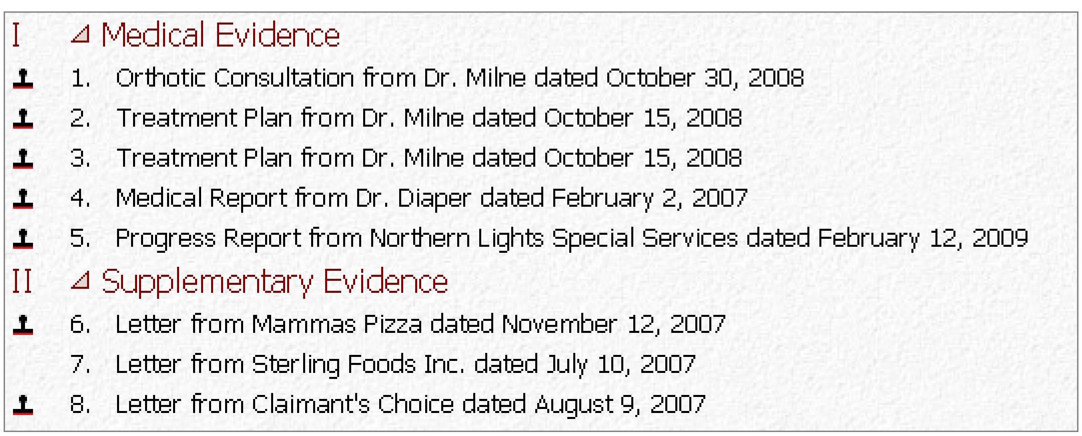
3. Select the desired Bates ID sequence, and documents where the Bates numbering will be applied (entire binder or selected documents.
4. Once you are satisfied with your selection, select **Apply**.
5. The next available numbers in the Bates ID sequence will be applied to your document(s).

Identifying Documents that have Bates IDs

You may see which documents in a binder have Bates IDs by right-clicking in the binder and selecting **View > Show Bates Icons** from the drop-down menu.



Documents with Bates IDs will be displayed with a Bates icon in the left margin:



NOTE: This selection replaces the Annotation Icons view. You can only see Bates icons OR Annotation icons at one time in the Binder view. Annotation icons can be replaced using the same drop down menu.

Clearing Bates IDs

Clearing Bates IDs is performed using many of the same steps used to apply Bates IDs. However, you will clear the Bates ID instead of applying. *NOTE: Once you clear a Bates ID, it cannot be re-used and is unavailable to the Case in the future.*

To Clear a Bates ID:

1. Select the document(s) in the Binder view.
2. **Right click**, and select **Productions > Apply Bates IDs** from the drop-down menu.
3. Select **Apply to Entire Binder** or **Apply to Selected Documents** in the Apply Bates IDs window. (Be careful, as once cleared, this action cannot be undone!)
4. Select **Clear**.

Exporting from Primafact

There are many ways to export content from Primafact. Publishing tools make it easy to assemble and share organized briefs.

Upload to Portals

You can now upload documents to browsers directly from Binders and Inbox folders[2]. This eliminates the "extra step" of dragging documents from Primafact to a local folder before exporting to locations in the Cloud.

VIDEO TUTORIAL: Portal Uploads

WATCH VIDEO

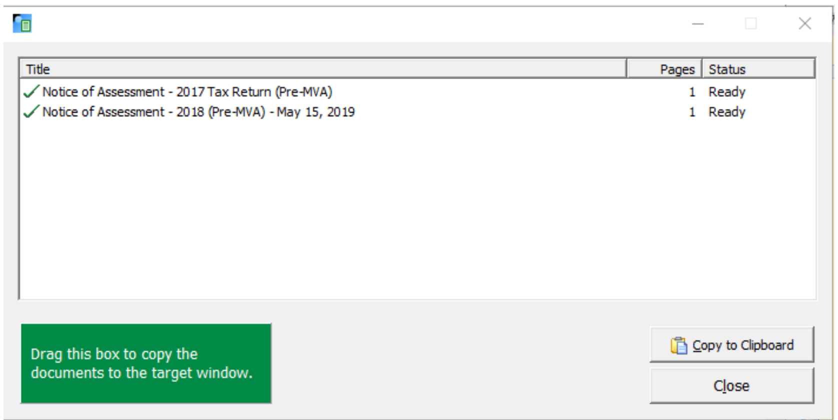
Watch our video on uploading documents from Primafact to online portals.

[2] Requires a supported browser.

Copy Documents to Browsers and other locations outside Primafact

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

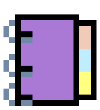
1. Select your documents
2. Click the **Export** Button
3. A separate window will appear. Drag the Green box to your target window.



4. Confirm your upload.
5. 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.

Bundle Binders



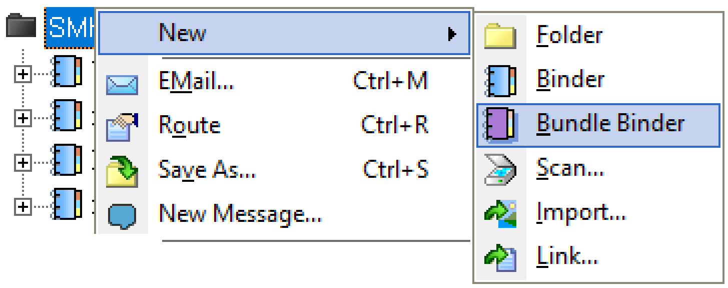
The Bundle Binder is a new Binder setting designed for sharing documents with entities outside your firm. It is particularly helpful for efficient creation and export of court submissions, including *CaseLines* submissions. A Bundle Binder is identified as light purple (rather than blue). You can set Binder as a Bundle Binder without losing any regular binder functionality.

The Bundle Binder setting makes it easier to access many e-brief production features 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** – Similar to the feature available in Primafact 5, but designed to be more efficient

Apply Bundle Binder Setting to a Case Binder

1. Right-click your Case Binder
2. Select **New > Bundle Binder**



3. Name your binder, and add Tabs, Sections and Documents as applicable.

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.

Now you can more efficiently export a structured document set in a single tabbed PDF, including:

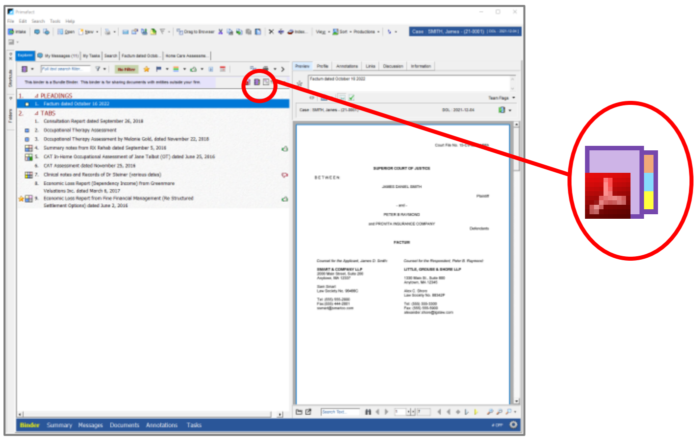
PDF bundle binders preserve links to other document locations in your bundle

- 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)

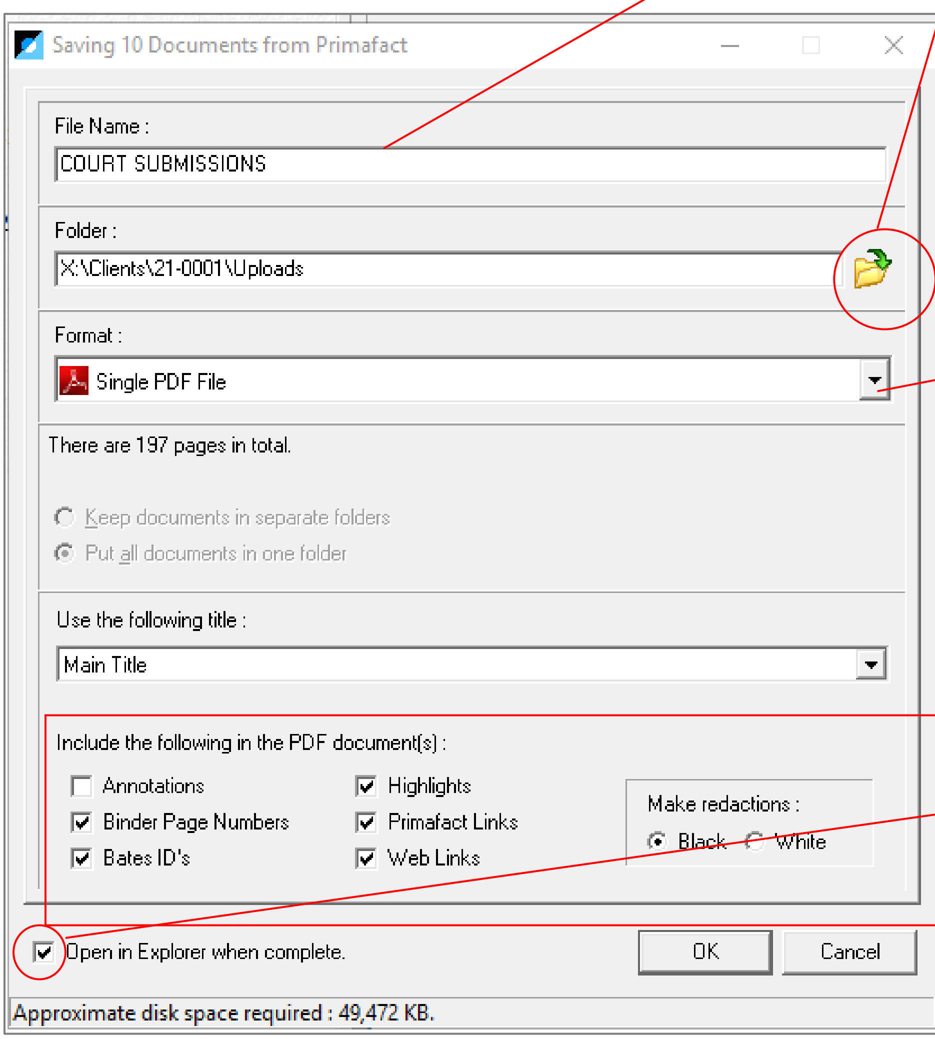
Large files can be easily uploaded to *CaseLines*, online portals, document exchange tools and other locations outside Primafact.

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](#).*

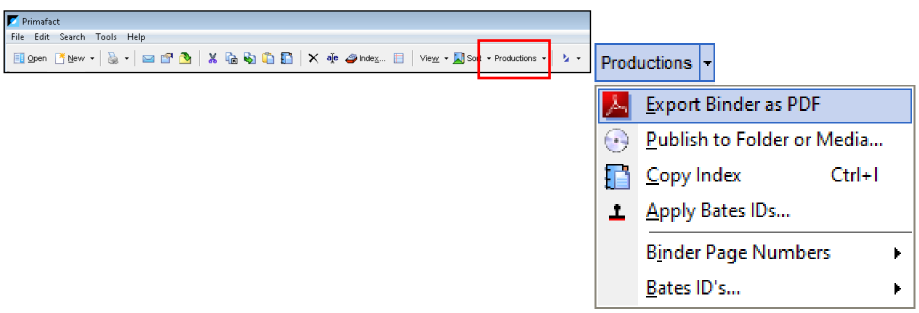
Exporting Binders as PDF without the Bundle Binder Setting

You can save any binder to PDF format to create easily-shared tabbed briefs, even if you're not using the Bundle Binder setting.

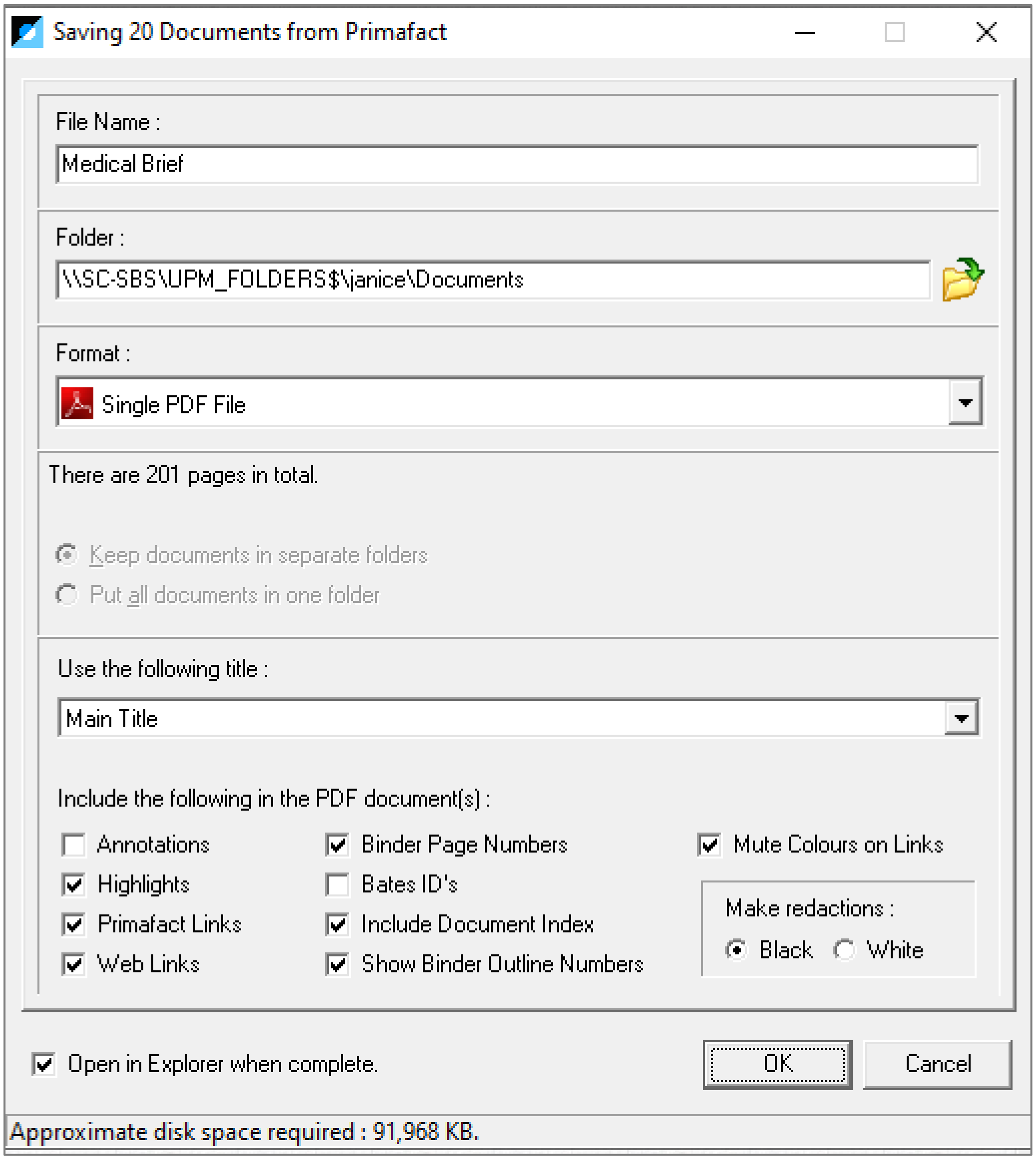
By default binders are saved as a single PDF. If Page Numbering has been turned on for the binders, this numbering will be included in the saved PDF. (Page Numbering can be turned off prior to saving to PDF if desired).

To export a regular binder as PDF:

1. From the Productions menu in the top toolbar, select **Export Binder as PDF**.



The Binder Save window will open.



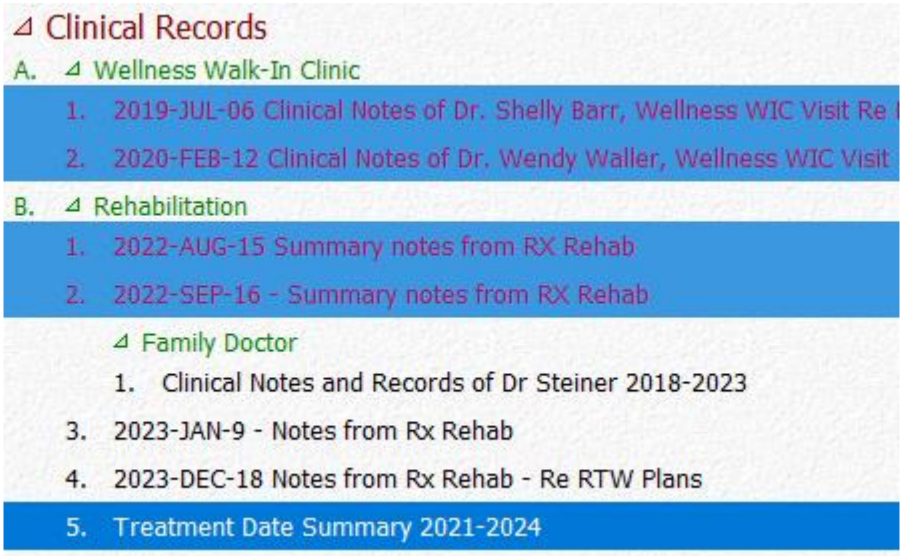
1. Select where you will save the folder in the **Folder** area, and how you wish to format your Binder (**Multiple PDF files** or **Single PDF File**). To create a single bookmarked document select **Single PDF File.** If saving as a single PDF file, you have the option of renaming your file in the **File Name** area.
2. Check the Open in Explorer when complete checkbox to open your exported PDF in Windows Explorer when your exported PFD is ready.
3. Click OK to export your PDF.

Note: Redactions are always included in Binders saved to PDF. Annotations are not included by default but can be included by checking the Annotations checkbox.

Export Select Documents as PDF

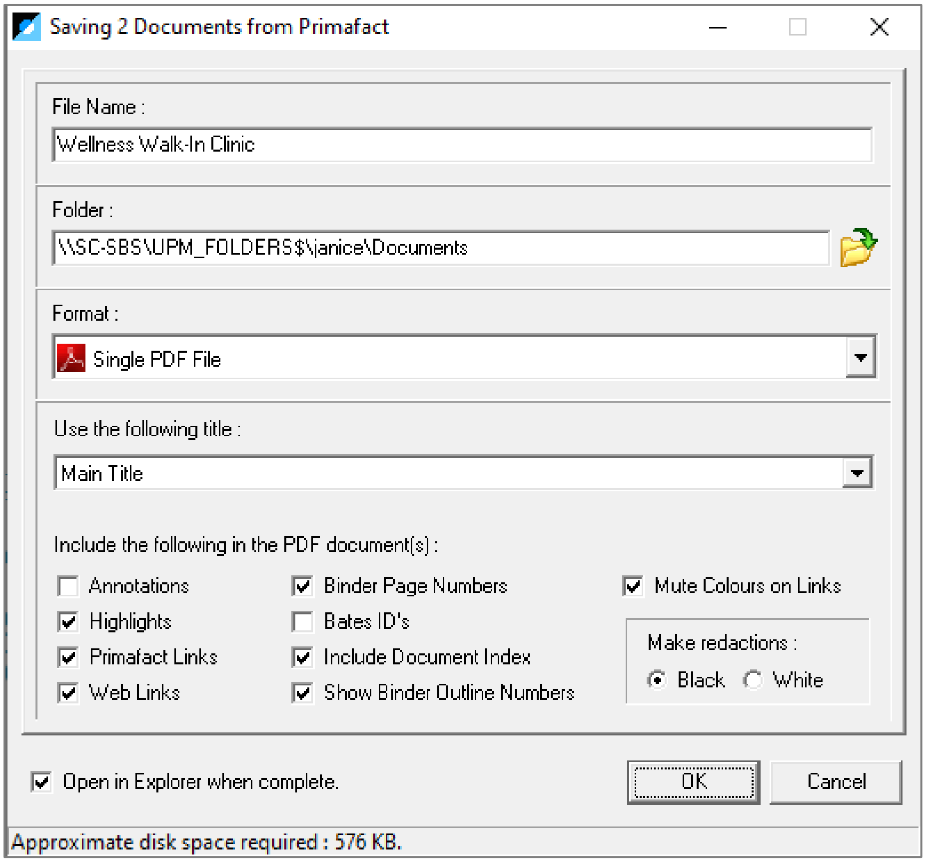
If you do not wish to export an entire binder, you can select specific documents, tabs and sections to export in a single PDF operation.

2. Select the documents you wish to export



3. **Right-Click** and select **Save As** from the context menu

   The Save window will open.



4. Select where you will save the folder in the **Folder** area, and how you wish to format your Binder (**Multiple PDF files** or **Single PDF File**). If you are saving as a Single PDF file, you have the option of renaming your file in the **File Name** area.
5. Check the **Open in Explorer when complete** checkbox to open your exported PDF in Windows Explorer when your exported PFD is ready.
6. Click **OK** to export your PDF.

Note: Redactions are always included in Binders saved to PDF. Annotations are not included by default but can be included by checking the Annotations checkbox.

Using Title Aliases

WATCH VIDEO

Primafact 6 Title Aliases allow you to assign more than one title to a document at the same time. This means a document can have more than one name, which is helpful when circumstances require you to name a document differently than your preferred document name in Primafact, such as naming court submissions.

Publish to Folder or Media

The Publish tool packages your documents with a built-in viewer which allows the recipient to view all the documents on a PC without the need to install Primafact software. Linked documents (e.g. Microsoft Word files, MPEG videos) can be included in the package, but require that the recipients have the necessary software installed on their computers.

What gets published, and what doesn't:

When you export documents using the Publish tool, the output content is a bit different from the PDF output options. The table below shows what is included in Published output:

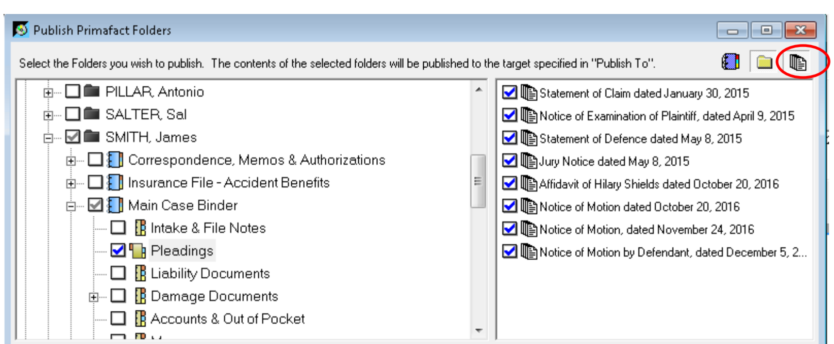
Always Included:	Optional:	Never Included:
• Documents included in the folders you select • Redactions	• Searching capabilities • Profile fields (metadata) • Bates IDs • Binder Page Numbers	• Annotations

Publishing Directly to CD/DVD

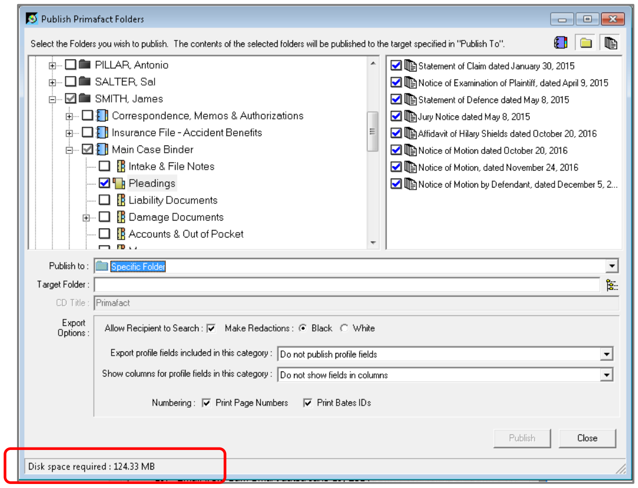
1. Insert a CD/DVD into your drive
2. Select **Tools > Publish to Folder or Media**
3. The **Publish Primafact Folders** dialog will appear
4. Select the folders, binders, tabs, sections or documents you wish to publish
5. Click **OK**

Selectively Publishing Documents

To publish or to exclude specific documents from a folder, display the document pane and select the desired documents. Click on the Documents icon in the top right of the window to select or deselect individual documents.



The status bar (bottom left-hand corner of the Publish window) shows how much space and how many discs the published documents require. This is an estimate.



Publish to a specified folder

If you wish to save your Published file to your network, you will want to publish to a specified folder. This save option is typically used when you plan to share your document via link to a document portal.

1. Create and name a new folder in Windows Explorer where you will publish your Primafact file. This will be referred to as your "**target folder**" in the steps below.
2. In the **Publish to** area, select **Specific Folder**.
3. Select your target folder using the dropdown in the **Publish to** area of the Publish window. Click the folder button  to navigate to your desired destination.
4. Publish steps are the same as when [Publishing directly to CD/DVD] above,

   Note: *Primafact will only publish to an empty folder. You will need to create your target folder BEFORE you complete Step 3 above.*

Sharing a Primafact published file via Document Portal

You will need to **Zip** the file before uploading to your document portal for sharing. The recipient will need to unzip the file to open or import to their own Primafact installation.

If you do not have a dedicated Zip tool and you are using Windows Explorer, you should be able to Zip your file by **right-clicking** on the Primafact Publish folder and selecting **Send to > Compressed (Zip) Folder**.

Importing documents received in Primafact Publish format

Documents received in Primafact Publish format use a dedicated import tool that preserves the organization of the published file. See *Importing a Primafact CD (Primafact Publish Import)* for details on using this tool.

Printing from Primafact

Print a document open in Primafact

1. Right click on the page and select **Print** or click the Printer icon the toolbar, or press **CTRL+P**

2. Select a printer from the dropdown menu.

3. Select the pages: you can print all the pages, the current page, or a range of pages.

4. The Content options in the lower left of the dialog are Primafact-specific.

    - If Page Image is checked, the scanned images (the content) will be printed.

    - If Annotations is checked, the annotation highlights are printed on the page image. The size of the printed page image may also be reduced to allow space to print the annotation details (date, author, and comments).

      If Page Image is not checked, Annotations can still be checked. Doing so will cause all the annotation details to be printed, without printing the page images.

    - If Stamps is checked, the stamps will be printed on top of the page image.

      Note that the size of the printed page image may be reduced to allow space for the stamps on the page.

    - It is possible to Print documents without including Redactions. If the Redactions checkbox is checked (recommended), all redacted areas in the document will either be blanked out or blacked out depending on whether White or Black is selected. It is very important that this box be checked for documents going outside the firm to protect privileged information.

5. There are two Special options you may choose:

    - Use Print as One Job if you are printing multiple documents, they will be sent to the printer as one big batch.

      This can be used if multiple copies of many small documents are being printed, and you want them collated.

      This can also be used if you are printing many small documents to a shared printer, and you don't wish your documents to be interspersed with other people's print jobs.

- The Conserve Memory checkbox only works when colour images are being printed. If a document prints but shows blank pages, try selecting this option.

Print all of the documents in a binder/tab/section/subsection

a) Select the first document you wish to print

b) Scroll down the window until you see the last document you wish to print - hold down the Shift key and left click on this document

c) Right click on any of these selected documents and select Print > Print Document(s).

Print selected documents in a binder/tab/section/subsection

a) Select the first document you wish to print

b) Hold down the CTRL key and left click on the desired documents

c) Right click on any of these selected documents and select Print > Print Document(s).

Check the Print Status

Primafact does its printing in the background. This means you can keep working while printing proceeds. You can even keep adding print jobs to Primafact's print queue. If there is an error while printing, you will not be notified. You have to check the Print Status to see that all your jobs printed properly. You do this by pressing **CTRL+ALT+P**, or select **File > Print Status** from the main menu.

Primafact 6 Team Coding Customizations

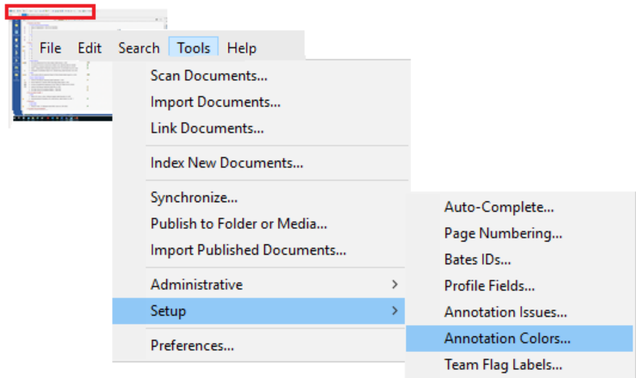
Primafact 6 enables more customizable settings for coding, including annotation colors and labels, annotation default form settings, and team flag colors and labels.

Global System-Level Customizations

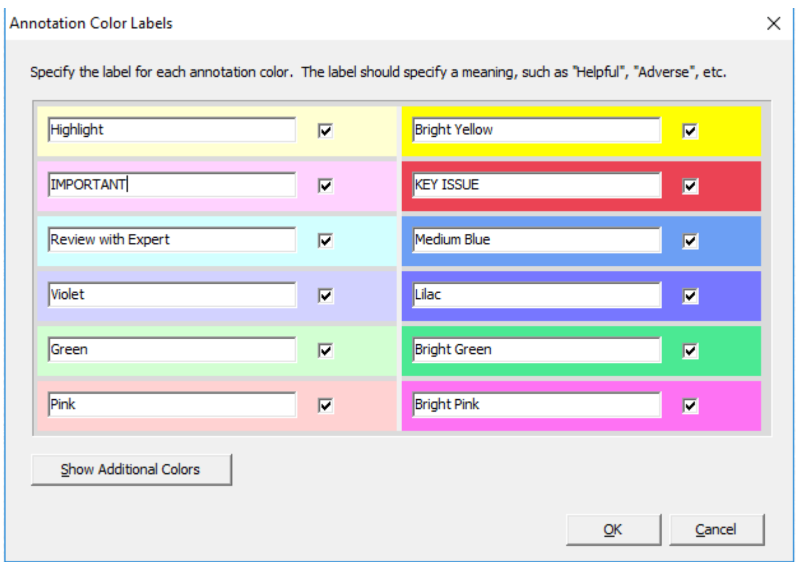
Customizing Annotation Color Labels

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

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 Global Team Flags

Team flags are colored document-level tags used to identify documents at the Case level. Similar to Profile Fields, they can be used to identify documents by attributes such as type of document, document content, and document status. Applying labels to Team Flags helps ensure their use is standardized across the team.

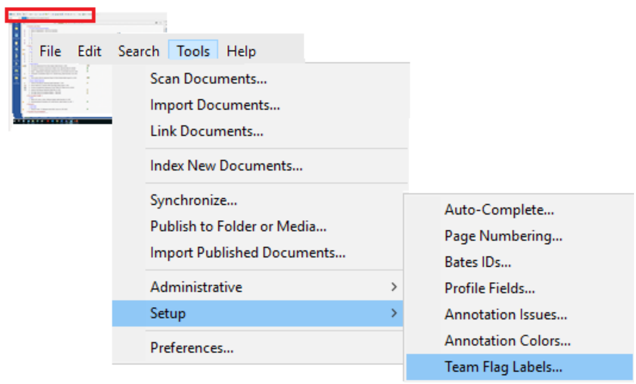
NOTE: Changes made to global labels are automatically applied to all cases across Primafact unless your case is set to override the Global settings.

It is a good idea to carefully determine a Team Flag's label before applying it as a global setting, as changes can create confusion and incorrectly tagged documents.

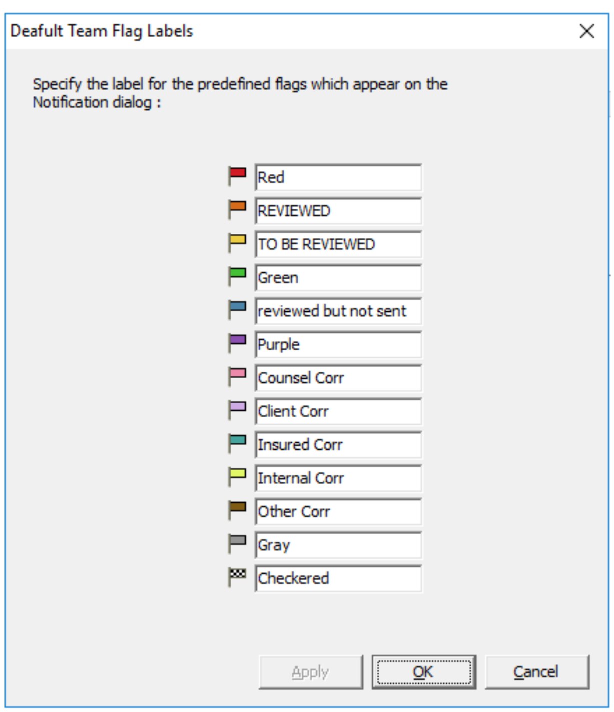
*If you wish to **"lock down"** the current Global Team Flag Label **settings on a case** (so that case labels are not automatically updated when changes are made to the Global values), open the Case Team Flag settings and select* **Override for the Case.**

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.

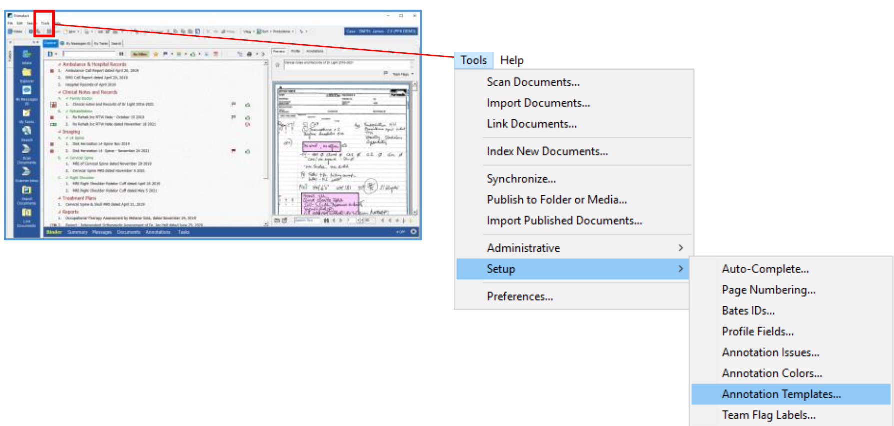
System-Wide Annotation Form Default Settings

You can now customize default annotation values. An example would be opening Annotations to a different color 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).

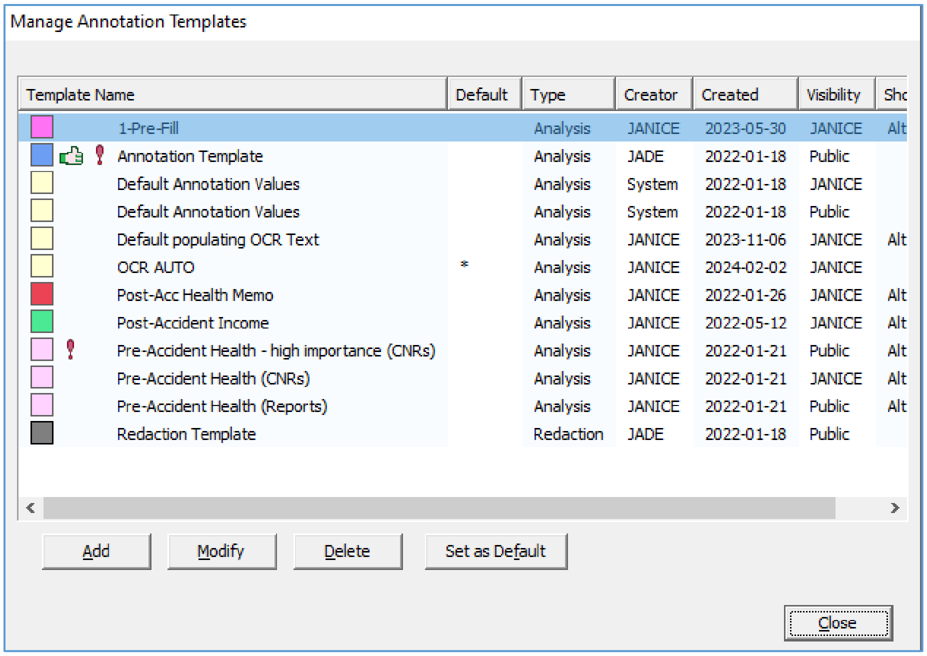
Adjusting Annotation Defaults – Global Settings:

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

   Tools > Setup > Annotation Templates



2. The Manage Annotation Templates window will open.



3. Select the template you wish to use as your default.
4. Select **Set as Default.**
5. Confirm your selection
6. Click **Close** to complete.

Customizing Profile Fields

A profile field represents one piece of metadata which can be associated with a document, for example, a document date. A profile category is a group of profile fields. Primafact allows you to enter data in any profile field in any profile category. Clients can create their own custom category and use existing fields or create new fields.

Creating and Modifying Profile Fields

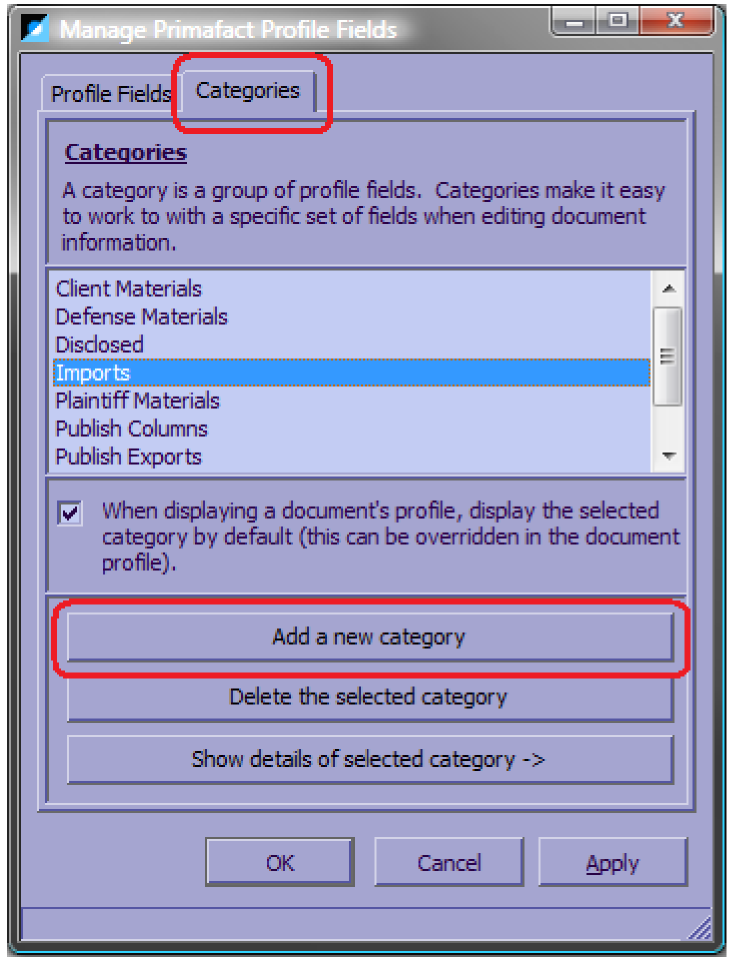
The user interface for setting up profile fields and categories is called the Profile Management Window. To access it, select **Tools → Setup → Profile Fields** from the main menu.

You may want to create a category for your firm, to include only those specific fields you'll use.

Creating a Category

1. Select the Categories tab.

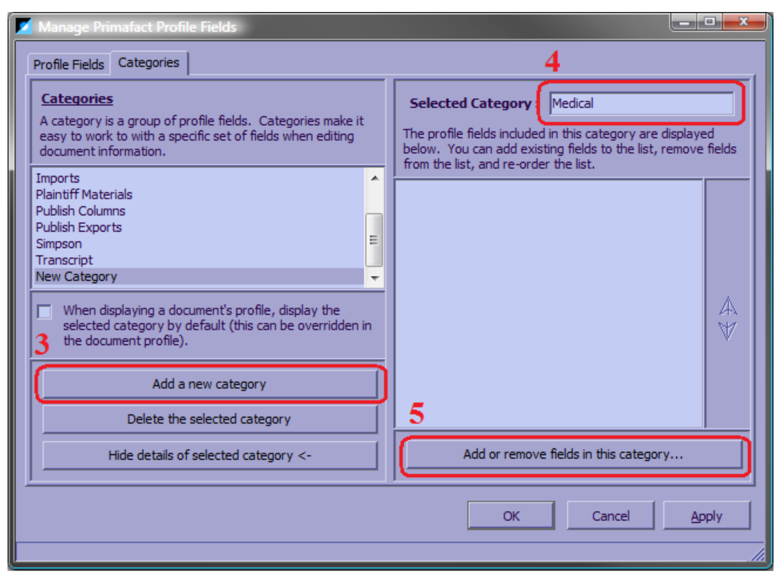
2. Click on “Add a new category”.
   You will now see the full window (see step 3).



3. Click on “Add a new category” in this window.

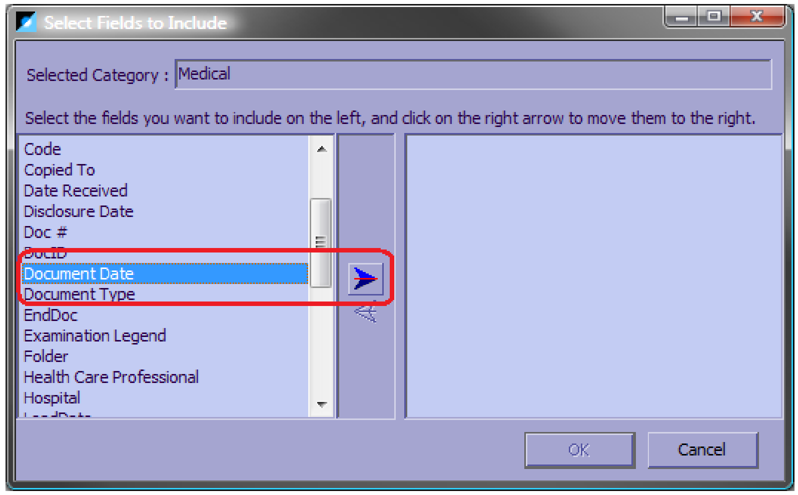
4. Enter a descriptive name for “Selected Category” in the top right, for example “Medical”.

5. Click on “Add or remove fields in this category…” to bring up the Select Fields to Include dialog.



6. Select a field in the left pane, and click the right arrow to move it to the right pane. You must include Document Date in every category, so start with that.

7. Continue adding fields you want to the list on the right. If you add a field by mistake, highlight it, then click the left arrow to move it back to the list on the left.

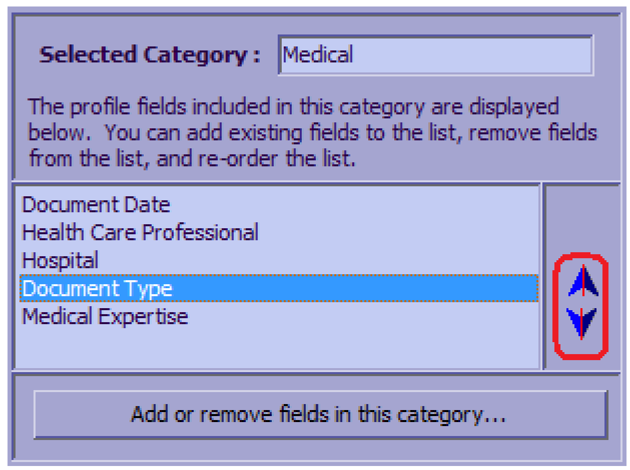


8. Click **OK** when done.

9. The fields you selected now appear under the selected category. Click on the up and down arrows to change the order of the fields.

10. Click **OK** to save the changes and close the window.

11. Click **Apply** to save the changes without closing the window.



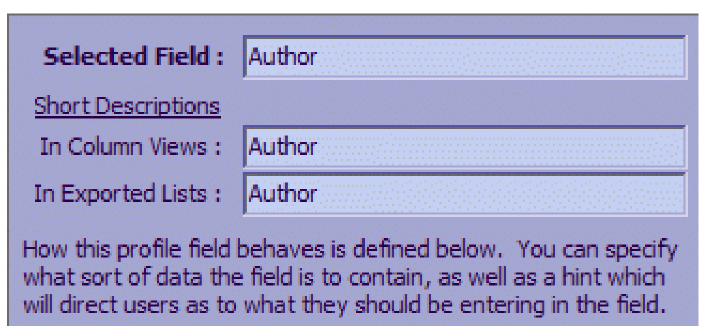
Creating a New Field

1. Click on the "Profile Fields" tab.

2. Click on Add a New Field. The new field is created – rename it in the Selected Field box.

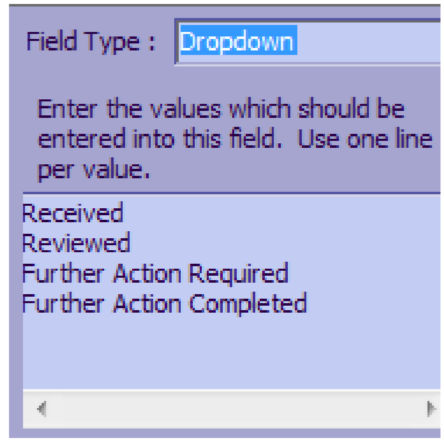
   - **In Column Views** - this description is used when the profile field is displayed in the list view on the Explorer tab

   - **In Exported Lists** - this description is used when exporting document data to CSV format file.



If blank, they will default to the description next to Selected Field when needed.

3. Select the Field Type from the drop-down list. The following types are available:



Text Accepts a single line of alphanumeric text.

Memo Accepts multiple lines of alphanumeric text.

Dropdown Appears as a drop-down box containing a list values you specify.

Number Accepts numbers only (no decimals).

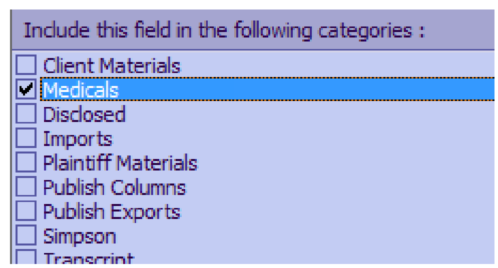
Date Accepts date input only. Appears with a drop-down calendar button.

Time Accept time input only. Appears with a drop-down time button.

Float Accepts decimal numbers.

Currency Accepts numbers with two decimal places.

4. Select the categories which should include this field. You should see your new category and ensure it is selected.
5. Click OK or Apply to save the changes.



Changes made to profile fields will not show up in any documents which are already open in Primafact. Primafact must be closed and reopened for changes to be visible.

Document Date Field

There is one profile field which cannot be changed and cannot be deleted: Document Date. This is a special field which Primafact uses for display and sorting of documents.

Configuring Title Aliases

Why Use Title Aliases?

Primafact 6 supports up to 5 sets of Title Aliases per Case. Title Aliases allow you to have more than one document title for each document, so that you can review and share the same document using different names that suit distinct use requirements, such as *CaseLines* document naming protocols. Among other advantages, title aliases can make document duplication unnecessary when done for the sole purpose of complying with court naming requirements.

Title Aliases can be set up at the Global level for ease of use on any Case, but you can override global defaults to set up custom Title Aliases for individual Cases

Auto-Generating Title Aliases

You can configure Title Aliases to auto-generate based on Case and Profile-field level attributes so that your documents get named according to content in that field. If using Auto-Generates, your team will need to ensure that applicable profile fields are populated with accurate data (an empty field will yield an "n/a" output for that field).

Setting Up Profile Fields

It helps to determine how documents will be named in a title alias, then to use (or create) Profile fields to correspond to the intended output. A Title Alias Category can make it easier to populate specific fields when applicable to your document.

If you wanted your output to look like:

1. Factum – Respondent Doe – 8-SEPT-2024

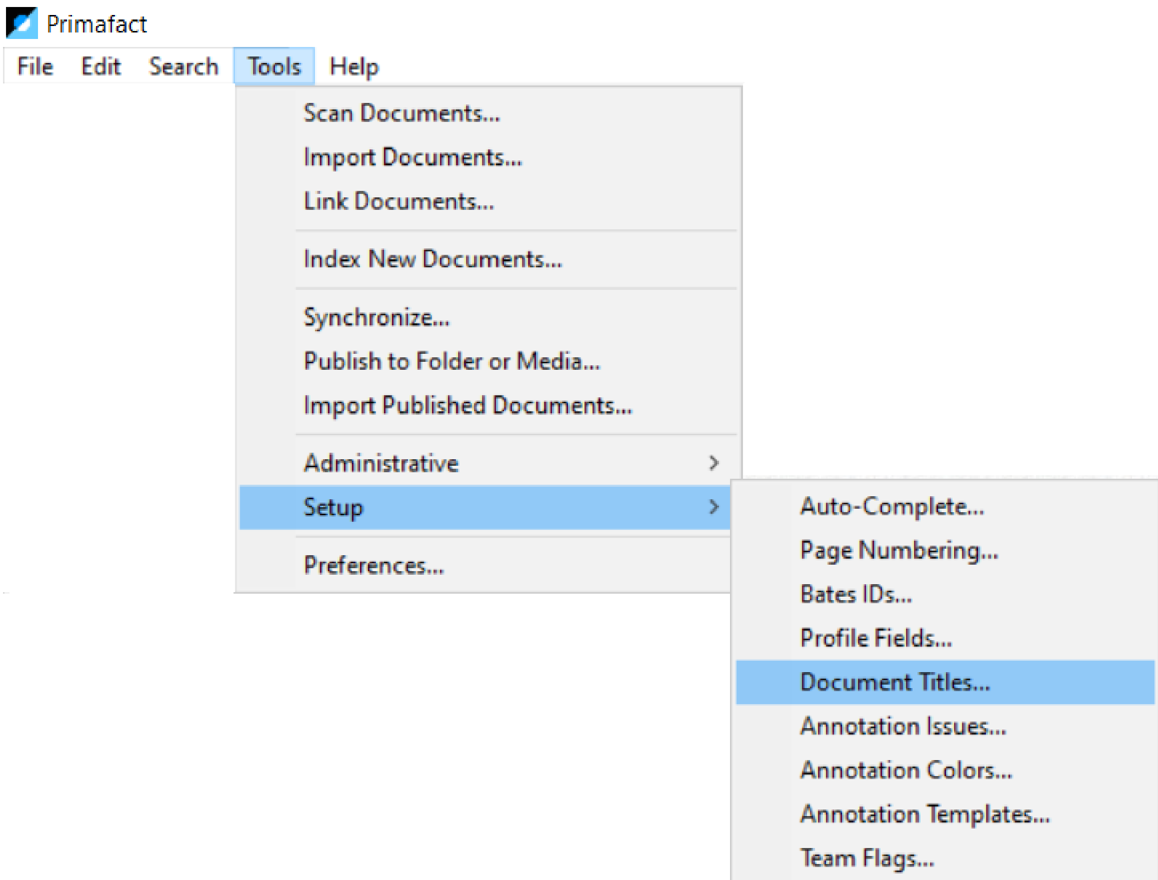
you would want to set up the following profile fields:

- "**1.**" .... [Document Number - *Custom Profile Field (Number)*]
- "**Factum**" .... [Document Description - Custom Profile Field *(Text)*]
- "**Respondent**" .... [Party Role - *Custom Profile Field (Motions) or Existing Field on Summary Screen (Main Action) (Text)*]
- "**Doe**" .... [Party Name - *Existing Field on Summary Screen*]
- "**8-SEPT-2024**" .... [Document Date - *Existing Field (Document Date)*]

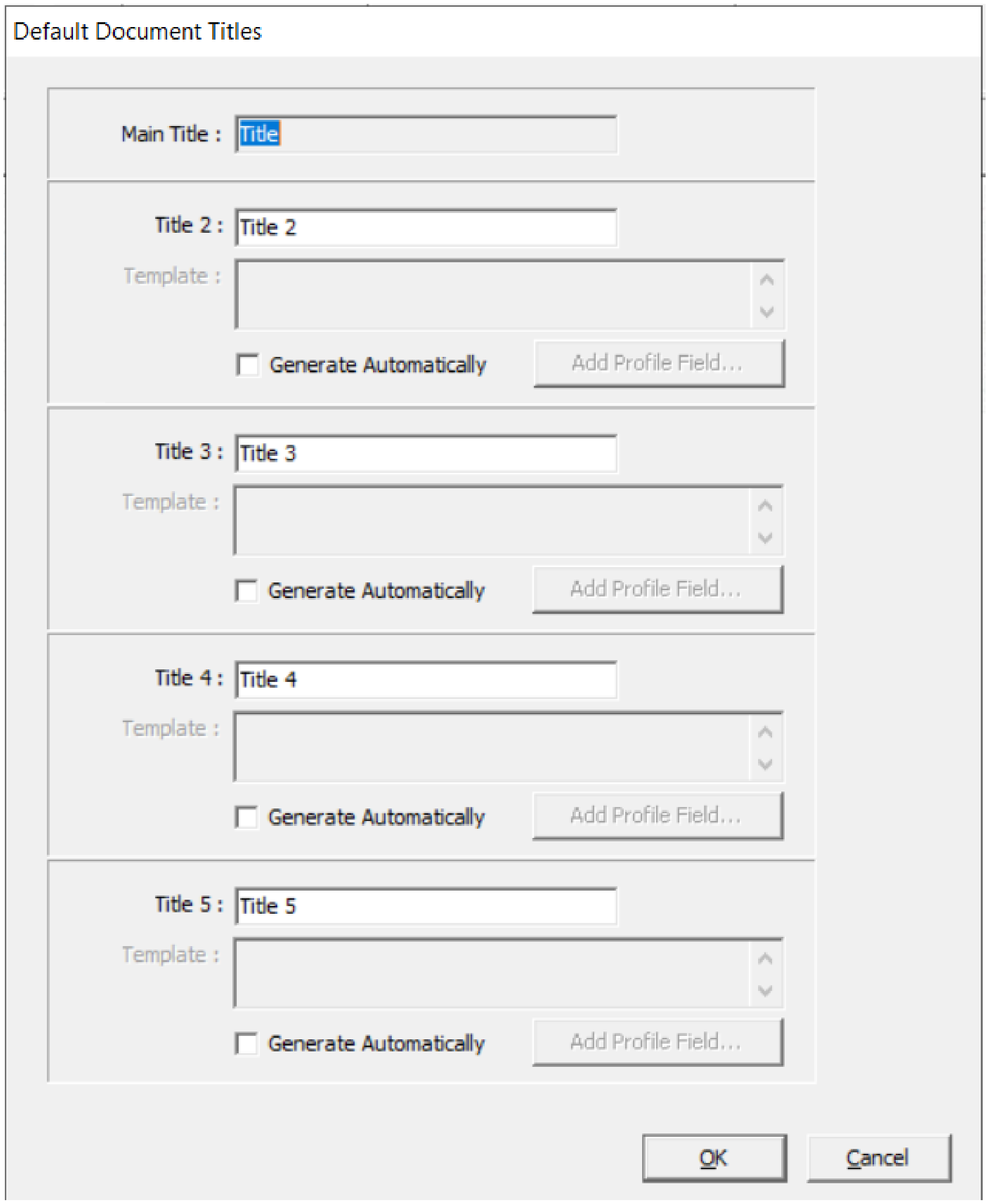
See ***Customizing Profile Fields*** for details on configuring Profile Fields

Configuring Auto-Generating Title Field

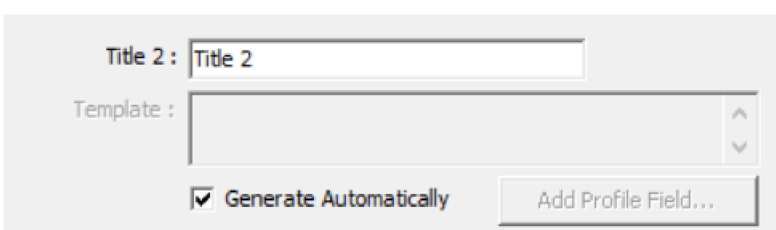
1. System default Title Aliases can be configured in the global settings by clicking Tools > Setup > Document Titles


Primafact
File
Edit
Search
Tools
Help
Scan Documents...
Import Documents...
Link Documents...
Index New Documents...
Synchronize...
Publish to Folder or Media...
Import Published Documents...
Administrative
Setup
Preferences...
Auto-Complete...
Page Numbering...
Bates IDs...
Profile Fields...
Document Titles...
Annotation Issues...
Annotation Colors...
Annotation Templates...
Team Flags...

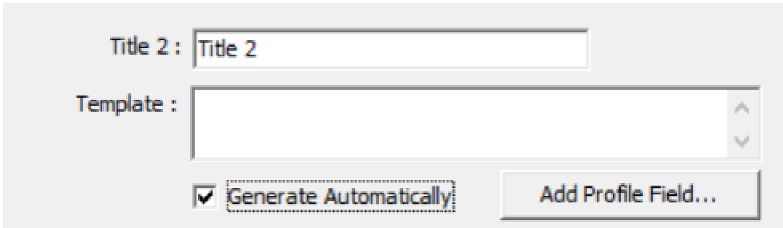
2. The Default Document Titles window will open:



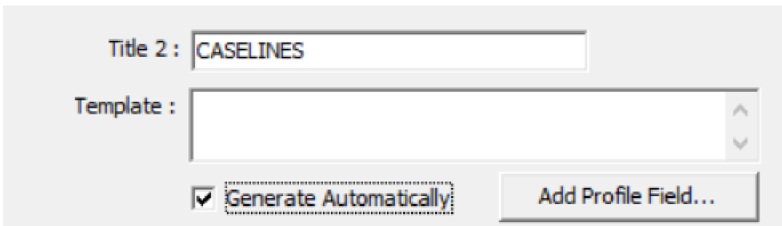
3. Click the checkbox beside the Title Alias you wish to set to auto-generate:



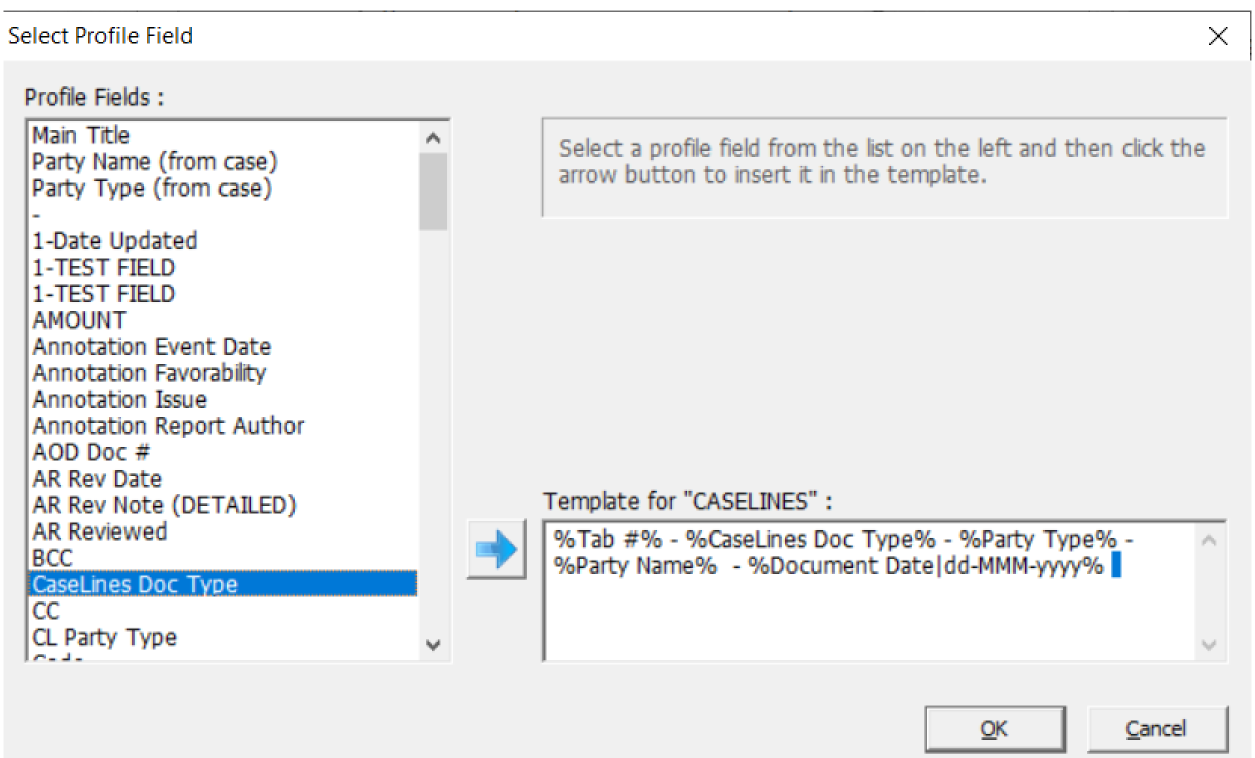
4. This will activate the Template area:



Name your Title (if you wish):



5. Click the Add Profile Field button
6. The Select Profile Field window will open.
7. Click the fields you wish to add and click the arrow button  to add the selected field to your Template.



NOTE: If you select "Document Date" you will be prompted to select a date format. You can adjust the date format manually by typing your preferred format, but may have to make a few adjustments to your template to achieve the desired output.

You can also add your own text to the Template:

> *e.g. Motion Record - %Tab #% - %Document Description% - %Document Date |yyyy-MMM-dd%*

Auto-Complete

The Auto-Complete feature allows you to speed up text entry by setting up shortcuts that are converted to designated text within document titles and annotations. Auto-Completes can be used for more efficient and consistent document naming and mark-ups.

Auto-Completes can be created for three types of use:

- ✓ Globally (firm-wide, all cases)
- ✓ Case-level (for specific Cases)
- ✓ User-level (for your individual use)

Creating Auto-Completes

To create an Auto Complete:

1. Select **Setup > Auto-Complete** from the **Tools** menu. This will open the Auto-Complete form.
2. Select the category/scope of the Auto-Complete that you are about to create (Global, Case List or User List).
3. Select the **Add** button.
4. The Add entry to Global list window will appear. Create your desired Abbreviation and associated term.

Once the Auto-Complete has been set up, you can use it to "auto-populate" any text field in Primafact, including document names and annotations.

Sharing Auto-Completes

Personal or Case-Level Auto-Complete lists may be shared among users and Cases, using the Export and Import features detailed below. To access these features, select the **Advanced** button on the Auto-Complete form. The **Auto-Complete Advanced window** will appear. You will use this window to export and import lists.

Exporting Auto-Completes

To use Case-Level Auto-Completes in other Cases (or to share User-Level Auto-Completes among other users or Cases), you will need to Export the desired Auto-Completes.

To do this:

1. Using the Auto-Complete form, Select the desired list (Global List, Case List or User List)
2. Click the **Advanced Button**
3. Select **Export this list**

The Export this Case list to file window will appear.

Determine where you would like to save your file by browsing the **Save in:** area.

1. Name your file in the **File name field.**
2. The file will be saved as a **CSV** (Comma Separated Values) file in the **Save as type**: area. ***Do not change the file type.***
3. Click **Save**.
4. Your file is available for Importing.

Importing Auto-Completes

This is a quick way to assemble Auto-Completes using existing setups.

Auto-Completes can be imported to other Cases and Users. First, the desired Auto-Completes must be exported (*see Exporting Auto-Completes*, above).

To import an Auto-Complete file:

1. Open the Auto-Complete Form using the **Tools > Setup > Auto-Complete** drop-down menu described under *Sharing Auto-Completes,* above.

2. Select the desired list (Global List, Case List or User List)
3. Click the **Advanced Button.**
4. Select **Import a saved list.**
5. The Import a Case List from file window will open.
6. Browse and select the desired file (this will always be a CSV file)**.**
7. Click **Open**.
8. Your file will be imported to your selected list. If there are any duplicate entries, these will be identified and ignored.

Case-Level Customizations

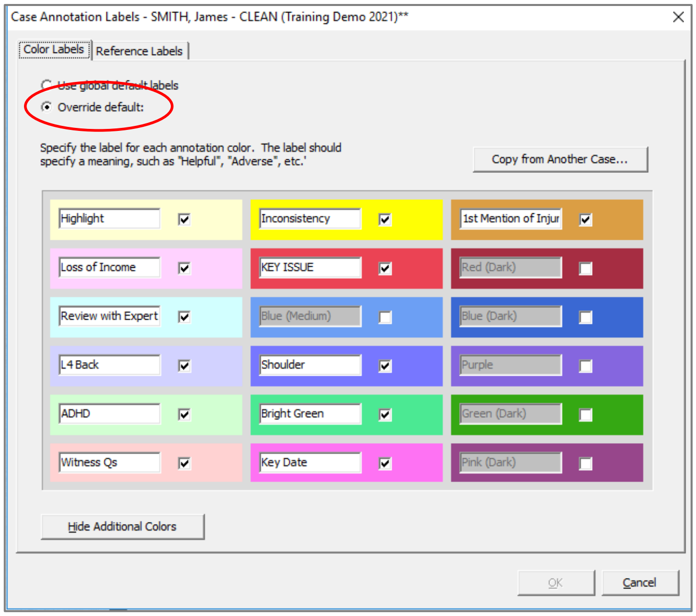
Case Annotation Customization

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:

1. Select **Annotation Labels.**
2. The ***Case Annotation Labels*** screen will open.



3. Select ***Override default***.

4. **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.)

5. Click **OK**.

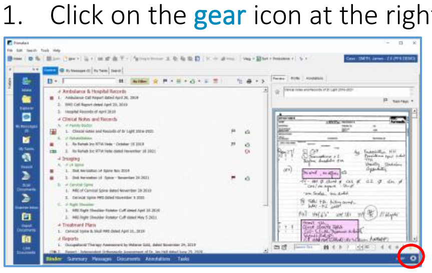
*Note you can copy values from another Case by clicking **Copy from Another Case** button, selecting the desired Case and clicking OK, then Yes to confirm. After the Case values have been copied, you can continue to customize your current Case labels as desired.*

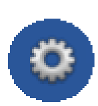
Customizing Annotation Case-Level Defaults with Case Templates

You can set default values for individual Cases, overriding global annotation defaults and annotation templates for that Case. Using Case Templates can help preserve standardization for values applied to individual cases, while allowing for variances across Case types.

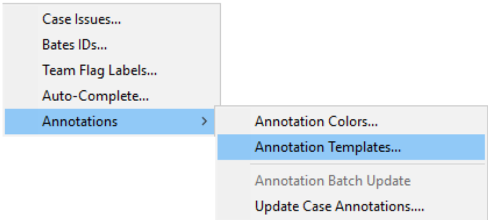
To change default annotation settings for a Case:

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

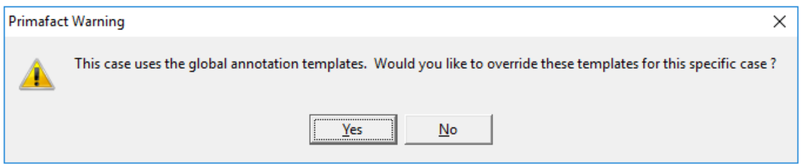




2. Click Annotations > Annotation Templates on the drop-down menu:

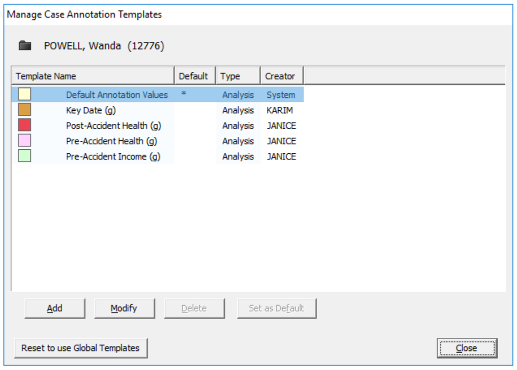


3. If you have not activated Case-level templates, the template override warning will appear. If you click "Yes" the Case Templates will disconnect from the Global templates[3].

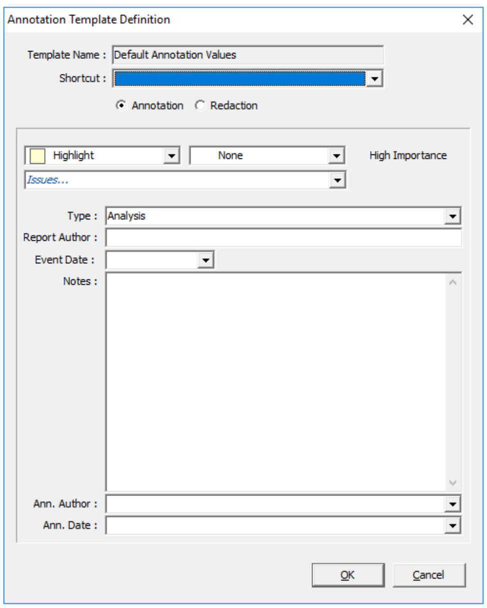


[3] You can reset back to Global templates but will lose any Case template customizations. (Any existing annotations made using the Case template settings will be preserved.)

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



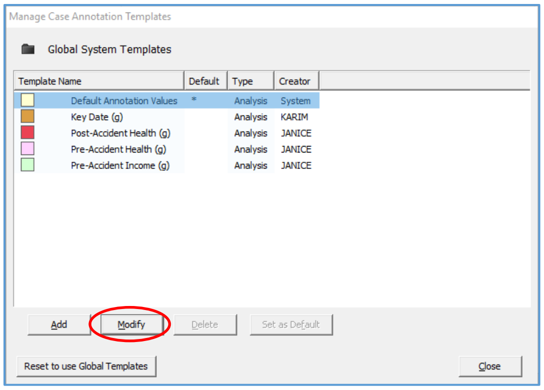
5. The Annotation Template Definition will open.



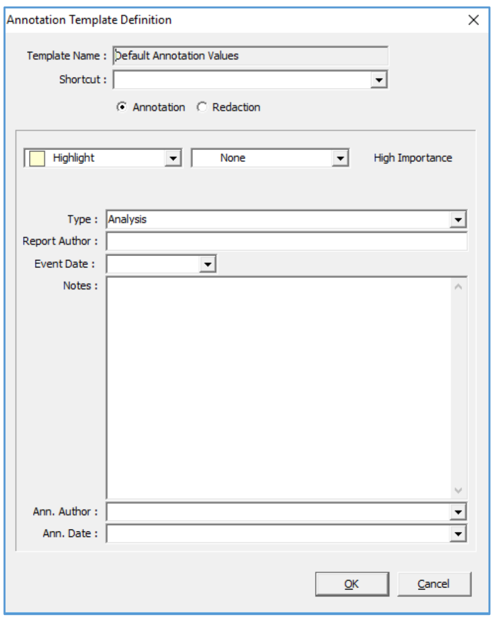
6. Set your field preferences and click OK. This works similarly to the settings for the global default annotation values, except you have the added option of adding ***Issues*** to the default Case annotation settings.

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

8. Click Modify.



9. The Annotation Template Definition will open.



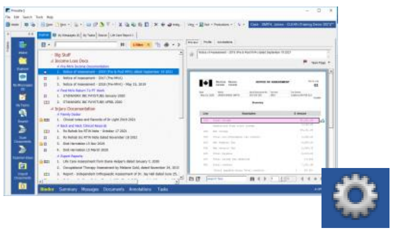
10. Set your field preferences and click OK.

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

Customizing Annotation Forms

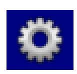
Annotation Form Customization (Event Time)

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 Ref Labels

Reference labels allow you to add extra form fields to customize tracked annotation information.

1. To customize Ref Labels for a case, select the Gear icon from the far right of the blue bottom navigation ribbon. 
2. Select Annotations > Annotation Options
3. The Annotation Options form will open
4. Select Show Reference Fields on Options
5. Specify your label for the predefined reference fields.
6. Your defined Reference field labels will now appear on Annotation forms associated with your Case.

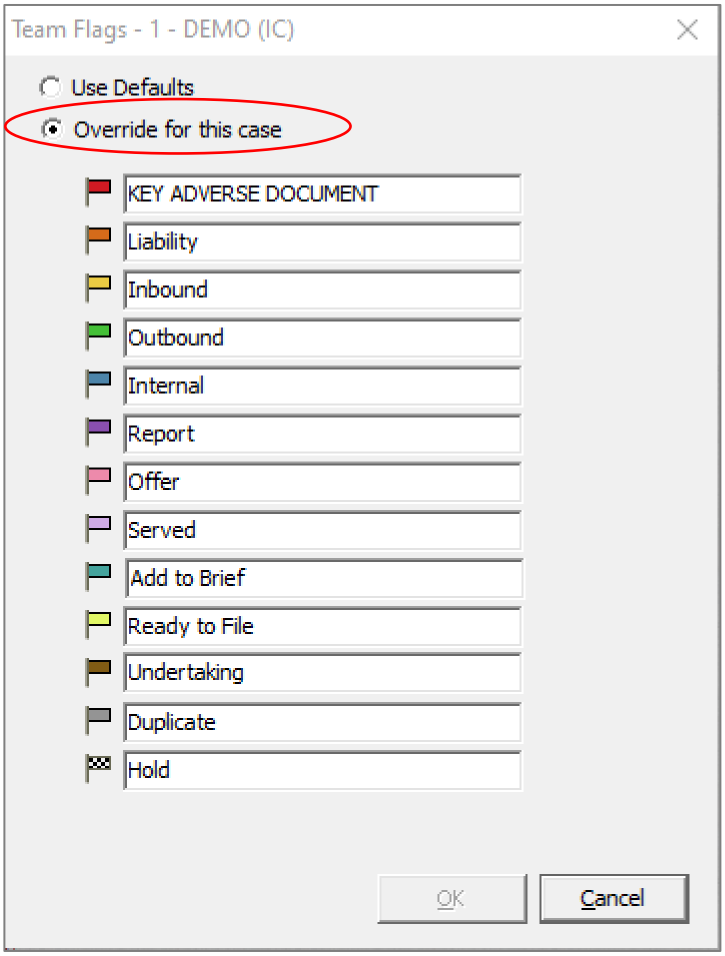
Customizing Case Default Team Flag Labels

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.

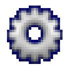


5. Select **Override for this case**.
6. Enter the desired label in the field to the right of your flag. This will overwrite the system default and apply your label to the Case.
7. Select **OK** to save.

Customizing Title Aliases for the Case

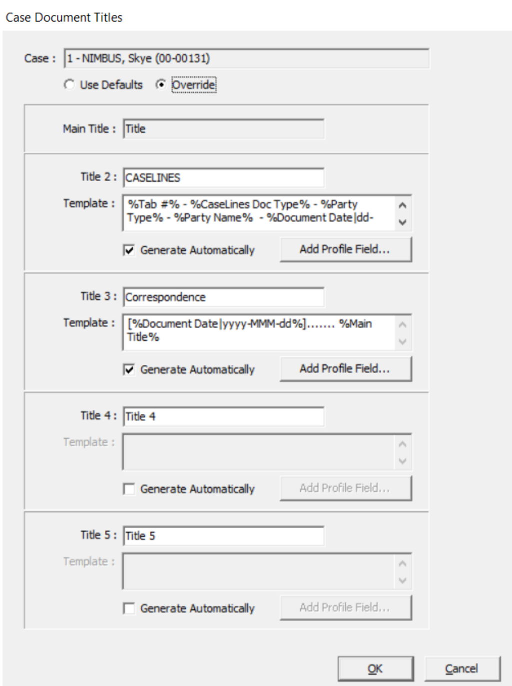
If your Case needs Title Alias Customizations that differ from the Global settings, you can override Global settings and apply customized Title Aliases for the Case.

To customize Case Title Aliases:

1. Access the Case Titles settings using the gear icon at the right corner of the blue Case Navigation Ribbon 

2. Select Document Titles from the menu.

3. The ***Case Document Title*** window will appear:



4. Click the Override button. (Notice the current Global Default values are displayed. These may be retained for your current case, modified or overwritten. Any changes will not impact the Global Settings.)

5. Select the Title series you wish to customize.

6. Rename the Title

7. Check the Generate Automatically checkbox to customize auto-generated content.

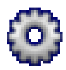
8. Add desired text and/or select Profile Fields. ***See Auto-Generating Title Aliases for details.***

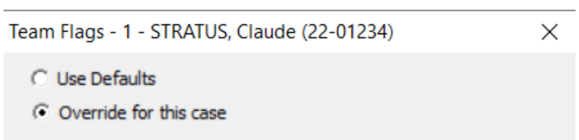
Customizing Team Flag Labels

You can customize Team Flag labels to diverge from Global Team Flag label settings. You may choose to preserve some Global labels and customize others, or apply completely customized Team Flag Label settings to your Case.

NOTE: Overriding Global settings divorces case Team Flag settings from Global settings. If you choose to customize any Team Flag label, any Team Flag label still using the Global Team Flag label name will not update along with any updates to that Global level Team Flag setting.

To customize Team Flag labels for the case:

1. Access the Case Titles settings using the gear icon at the bottom right corner of blue Case Navigation Ribbon 
2. Click on the Gear icon and select **Team Flags** from the pop-up menu.
3. The Team Flags window will appear.
4. Click the Override for this case button to customize Team Flag labels for the case.



5. Rename any flag colors you wish to reassign to new label values for the case.

Using Case Templates to Apply Label Values to your Current Case

Case Templates can include customizations to label values, making it quick to update an individual Case to a set of standardized settings that diverge from Global Settings.

You can apply settings from a Case Template, or from other Cases.

****To apply Case Template settings to the Current Case*

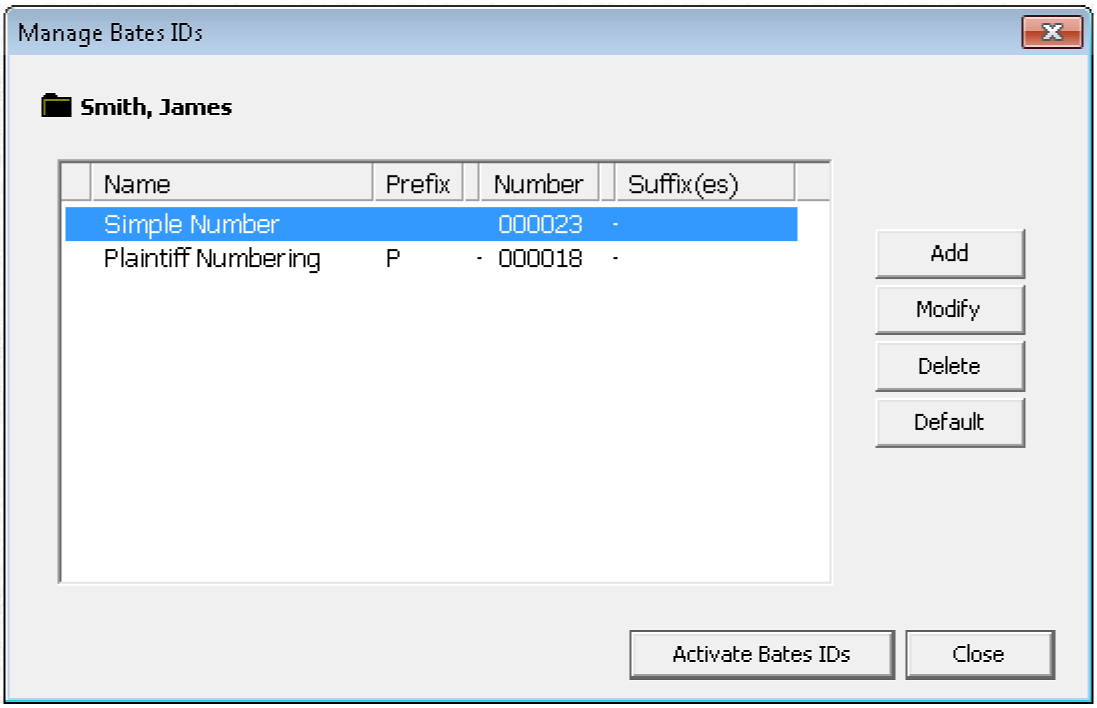
NOTE: When you override Global settings on a Case, your Case will not automiatically update

Managing Bates IDs

Setting up the Bates ID Master List

Access the Bates Master List using the Gear icon at the bottom-right of the blue Case Navigation ribbon :

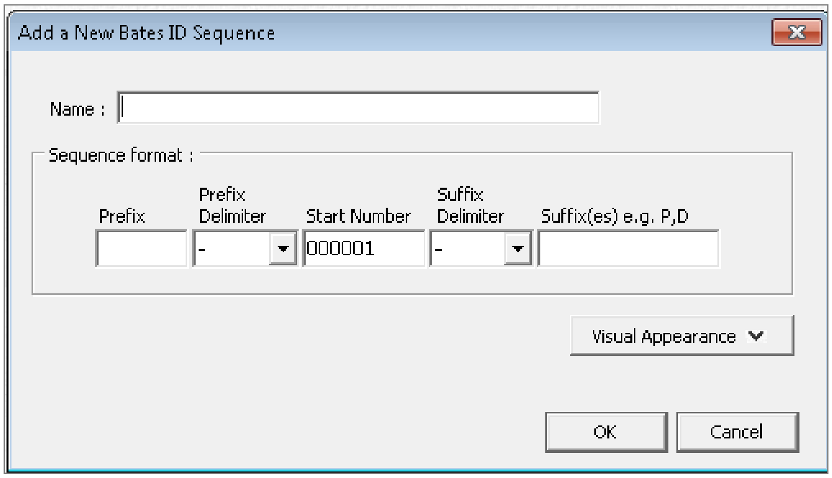
1. Click on the Gear icon and select **Manage Bates IDs from** the pop-up menu.
2. The **Manage Bates IDs** window will appear:



Add a new Bates ID sequence using the Add button, or modify an existing Bates ID sequence using the Modify button.

Adding a Bates ID sequence

1. Select **Add** from the **Manage Bates IDs** form**.**
2. The **Add a New Bates ID Sequence** screen will appear.



3. 3. Enter the name, any Prefixes, Prefix Delimiters (a hyphen is available) the desired start number, and any desired Suffix/Suffix Delimiter.
4. ***NOTE****: Any Bates ID in this sequence may be used only once. The same number (e.g. 000001) can be used with multiple Prefixes, resulting in a unique Bated ID for each.*
5. The Bates ID's Visual Appearance may be modified by selecting the **Visual Appearance** button. This area functions much like the **Stamp** interface, allowing you to select font, font size, and page position. (The middle position is unavailable).
6. Select **OK** to save your new Bates ID sequence.

Modifying a Bates ID Sequence

To modify a Bates sequence, open the **Manage Bates IDs** screen. Select the desired sequence and click the **Modify** button. Changes to the Bates ID sequence format (position, font, font size etc.) will apply retroactively to existing uses of that sequence.

Primafact Administration

Trash

Managing the Trash folder

During training users are told to empty the trash regularly. There should be only one or two people in a firm that have this ability. This is set up in the Primafact security module.

You can find out who has full access to the trash: Click on the Trash Folder, then right click. If you see "Delete" or "Empty Trash" as options, then you have Full Access to the Trash. Users who have

Read Only access will not see either of these options. If everyone can see the Delete and Empty Trash options, please contact Primafact Support to set up Security on the Trash.

The trash should be purged routinely to avoid “bloating” your database with discarded materials.

We also recommend clients organize the trash by the date things were put in the trash and then deleting ONLY documents that are older than 60 days. (the Undo function shows actions performed up to 60 days ago – they will not be retrievable using Undo if purged from the trash.)

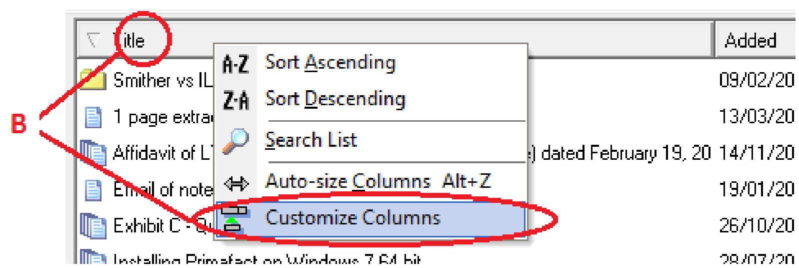
There may be instances when documents are accidentally deleted from their folder or binder. In order to prevent someone from deleting them from the trash or emptying the trash altogether, it is best to restrict all Primafact users’ access to this folder (Read Only) and leave the management of this folder **to one or two people who would be given Full Access**.

Please have your IT person call Primafact Support to set up or change Security on the Trash Folder. We recommend your IT person manages the Security on Primafact, with assistance from our Support technicians.

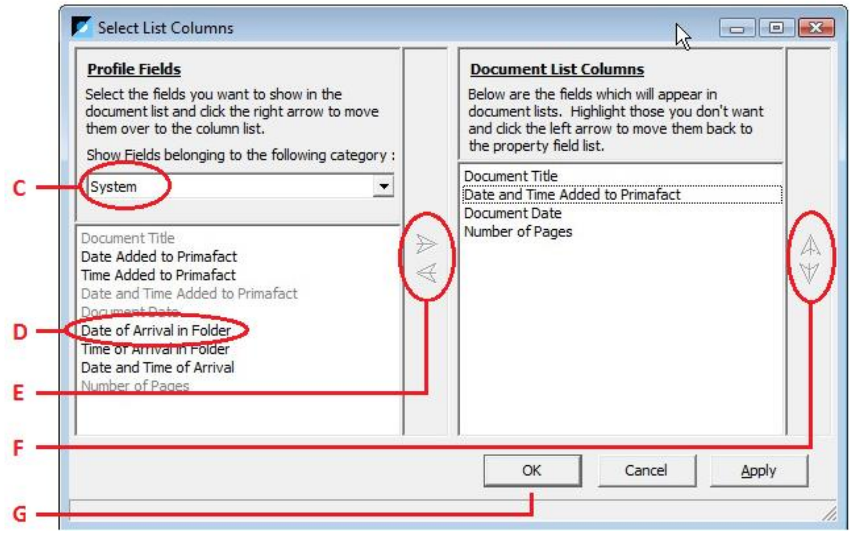
Purging files from the Trash folder

1. Navigate to the **Trash** folder.

2. Because you will typically want to limit purging to older items, it will be helpful to sort items by Time of Arrival in the Trash. In the display window on the right, if you do not see a column titled “**Arrival**”, right-click on any column and select **Customize Columns**.



3. In the new window, in the left side under "Profile Fields", from the drop-down list, select "System". ***See Area C, to the right***
4. Next, in the list under "System", select "**Date and Time of Arrival in Folder**". ***See Area D***
5. Click on the arrow pointing to the right to add this to the "Document List Columns" section. ***See Area E***
6. Click on the UP or DOWN arrow on the far right to position the column now, if you like. **See Area F**



7. Click **OK**
8. Click on **the** newly added column to sort by the date and time the items were put into the trash.

Document Size

Single document size should not exceed 1,500 pages. If necessary, when scanning or printing to Primafact, do so in batches of 1,500 pages or less. Primafact can house documents over 1,500 pages but larger documents can have issues with Indexing, extracting, merging and printing.

Contacting Primafact Support

9am-5pm EST Monday-Friday (excluding holidays)

support@primafact.com
Local Toronto: 416-531-0891 x 1
Toll-free: 1-888-881-0891 x 1