Working with Primafact 5

User Guide

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www.primafact.com

Contents

Introduction

Primafact is **Document Management Software for Litigation** with features designed to meet litigators' needs for evidentiary document management, case development, analysis, and litigation support activities.

Primafact provides two main benefits to litigation teams:

1. Improved efficiency in managing litigation documents
2. Improved access to case documents making it easier to prepare and present legal positions.

Why are we using Primafact?

- ✓ Better document access with all documents related to a matter organized in one central location
- ✓ Search for a document electronically, no more misplaced documents or files
- ✓ "Google" like searching – search for any word or phrase in document
- ✓ Immediate access to all files in a case
- ✓ "Less paper" in the office – eliminate copies, Print on Demand
- ✓ Create file index electronically for productions
- ✓ Synchronize a case to a laptop for Out of Office access
- ✓ Burn a CD of Productions to send out
- ✓ Ability to annotate (mark up) and redact documents

Part 1: Getting Around Primafact

The Big Picture

Cases

Primafact 5 and the Primafact Mobility Beta incorporate the concept of a “Case”, which is visually identified as a black folder icon. Structured like other binders/folders in Primafact, a Case is a type of Primafact folder that supports mobile document access and specific legal document and case assembly features. ***A Primafact file must be converted to a Case to be accessible using your iPhone.***

Explorer Tab

Binder View

Binder Collapse/Expand

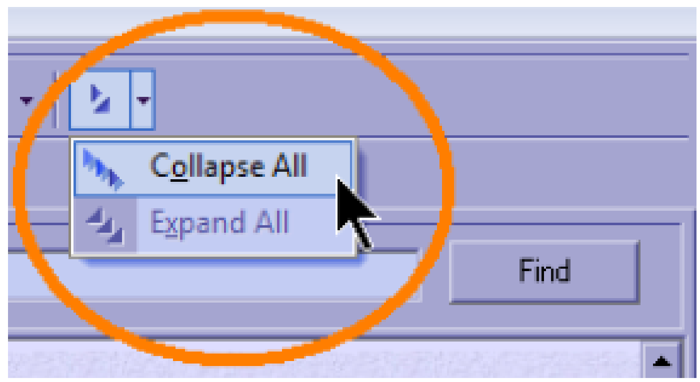
Collapsing and Expanding Applies Only to You: Unlike binder sorting, collapsing and expanding tabs and sections only affects your view of the binder.

You can collapse or expand the binder to aid in navigation – ie. if you only want to view the “Pleadings” tab, then you would collapse all and then just expand “Pleadings”.

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)

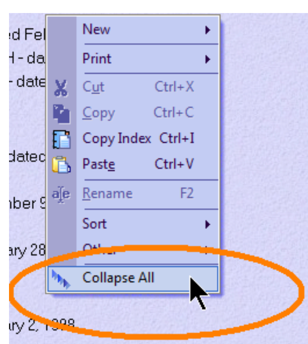
1. Open a binder.
2. Click on the Collapse/Expand toolbar icon and select "Collapse All" or "Collapse" just the tab/section you have highlighted.



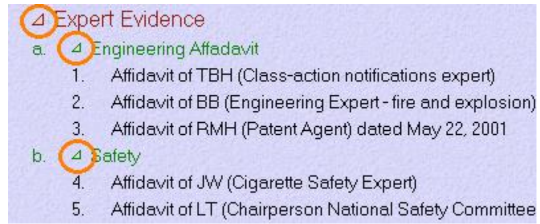
3. Click on the Collapse/Expand toolbar icon and select "Expand All" or just the tab you have highlighted.

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.

Enhanced Binder View

Primafact's binder view now makes it easier to identify your documents using the document preview pane, which displays your document or document profile alongside the binder view.

To display the document preview pane, click the button to the right of the quick search panel above the binder index. You will have the option of displaying your document (Pages Tab) or Profile (Profile Tab) from the top-left corner of the Preview Pane.

Document Preview

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

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.

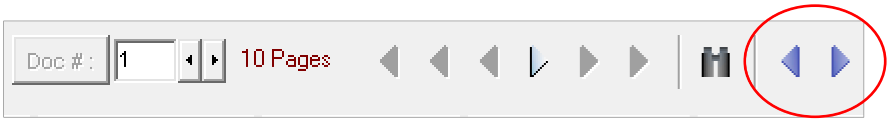
Opening a Document from the Preview Pane

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.

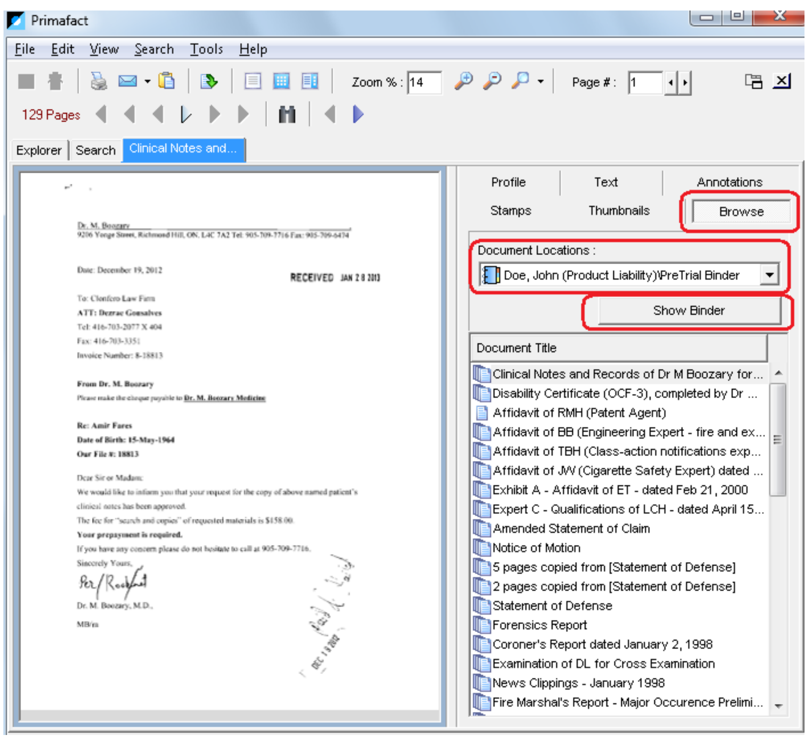
Browse Feature

The Browse feature allows you to quickly go to the next or previous document without going back to the Explorer view or opening a new document – you can also jump ahead to other documents using the Browse tab.

Use the blue arrows to the right of the binocular icon to go to the previous or next document in the binder.



Clicking the “Browse” tab shows a list of all the documents in the binder, in the order they appear in the binder. Clicking on any title will show the first page of that document.



Click on the Browse tab to display the document list.

The Document Locations drop-down list shows the locations where the document appears.

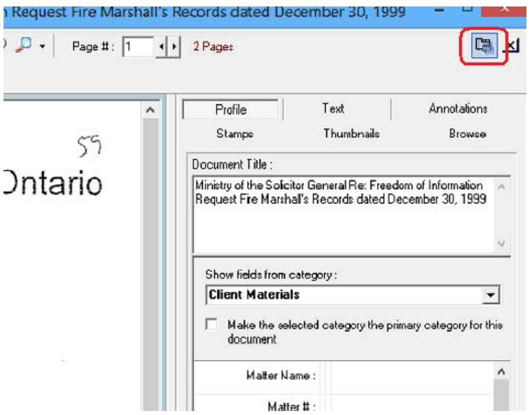
Click on the Show Binder button to jump to the binder view in the Explorer tab.

Detachable Document Windows

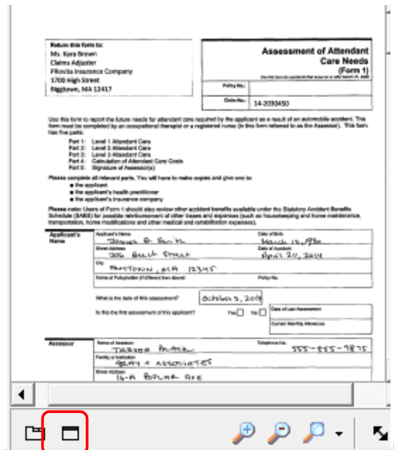
You may view and work on more than one document at a time in Primafact by opening it in its own window. This feature is best used with two monitors. All features from Primafact are available in this new window (ie: annotate, redact, rotate, thumbnail view, etc).

You can open the document in a new window by clicking on the New Window button in the top right of the toolbar (next to the Close Document button) or, in the lower left corner of the preview pane, if you prefer.

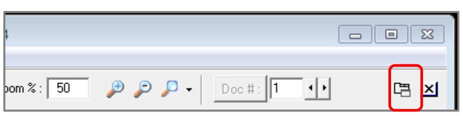
Open Primafact Document



Preview Pane



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

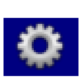


This will return the document to a tab in the main Primafact window.

Note: You cannot open multiple instances of the same document at one time.

Bottom Navigation

The new bottom navigation ribbon gives quick access to the Case Binder, Document List, Annotations List, Favorites and Tasks.



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

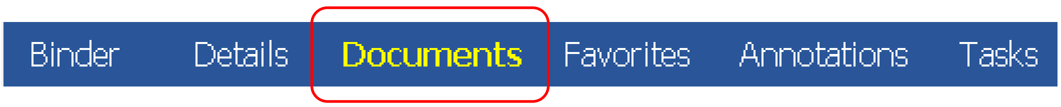
Document List View

In addition to viewing your document sets in the familiar binder index format, the **new 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. 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.

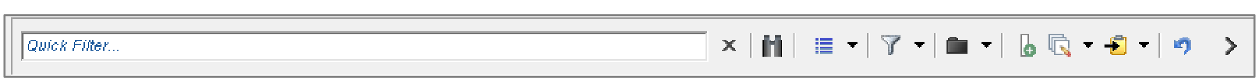


List View Features

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

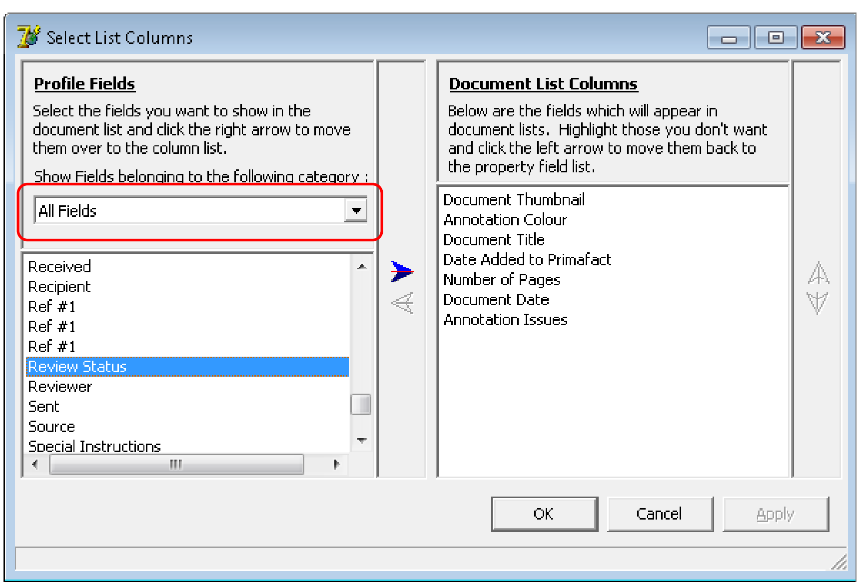
To view the document's Profile Fields, select the **Profile** tab in the Preview window. The **Messages** tab will display messages related to the document.

Selecting List Columns

You can sort documents by Profile Fields, which can be assigned to a list column.

To customize the columns used to sort your document list, select the **Profile Field** icon from the Filter bar.

The **Select List Columns** dialog will appear. Selecting **All Fields** from the top-left dropdown box will display all of the profile fields available to display as a list column.



Select the desired Profile Field from the left window, and select the Blue Arrow to include it into your document list columns. You may move the item up or down in the display using the blue arrows to the right of the dialog.

Your chosen Profile Field will now appear as a column in your chosen location on the document list.

Thumbnail Display on List

Document Thumbnails are now available as an optional column in the **Documents** view. This icon displays the first page of each document in your list, making it easier to visually identify documents. **Document Thumbnail** must be selected from **System** or **All Fields** to display the Favorites icon on the Documents List (the star appears on the thumbnail).

Positioning the Document Thumbnail at the top of the Document List Columns, so that it appears in the left-most column is recommended.

		Title	Added	Pages	DocDate	Issue
		Attending Physician's Statement dated from July 20, 1988 to October 31, 1994	2016-03-11	3	1988-07-20	
		Authorization Request dated January 1999	2016-03-11	1		
		Bone Density Report dated October 4, 2010 of Dr. W. Bensen	2016-03-11	2	2010-10-04	
		C.C.P. Functional Status Report dated from November 11, 1998 to December 2, 1998	2016-03-11	4	1998-11-11	
		Claim Form dated September 23, 2010 of Dr. Peter J. Leggett	2016-03-11	2	2010-09-23	

To Export Lists see ***Exporting Lists*** **in** ***Part 5, below.***

Favorites

Favorites allow you to identify documents that you refer to frequently, for ease of access. This is especially relevant to documents accessed from your mobile devices, whose smaller size makes navigation of larger lists and multiple screens more cumbersome. Favorites allows quicker access to frequently-used or important documents on your mobile device.

Creating Favorites

To create a Favorite within a binder:

1. Right-click on the desired document
2. Select **Favorites** from the dropdown menu.
3. You will see your document marked with a star to the left of the binder index.

Favorites List

To see your favorites list, select **Favorites** from the bottom navigation ribbon.

Your Favorite documents will appear on this list. ***Note: Favorite items are user-specific.***

Removing Favorites

To remove a Favorite:

1. Right-click the document name in binder view or on the Favorites list.
2. Select **Remove from Favorites**.

Setting your Viewing Preferences

Viewing 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, 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 order in which documents are displayed in Binder view is universal.

To Customize your Binder View:

1. Right-click anywhere in the binder pane
2. Select **View → Customize Binder View**
3. Once your customizations have been selected, click **OK.**

Part 2: Document Intake and File Assembly

Scan Settings

For documents to be scanned into Primafact, we recommend the following settings:

- Black and White
- Letter size (unless it's a legal or other size document)
- 300 PPI (this is the minimum setting, do not scan at 200ppi or lower)
- ***Color should only be used for documents that need to be in Primafact in color – i.e. photographs***

Understanding Binder Templates

A template is the foundation of your files, providing the "skeleton" onto which your new client files will be built. Each binder is organized with tabs & sections to sort documents by type.

Similar to precedents found in a law firm, templates are meant to be copied into a folder, renamed for the client file, and then can be amended to reflect the unique needs of the file.

Most client files will be organized in binders, in much the same manner that a physical (paper) file is set up for easy information retrieval. The typical file structure is a client folder with a binder.

Each binder will be organized with tabs (red – but customizable) and sections (green – also customizable), looking something like the image to the left.

Opening a New Client File in Primafact

1. Locate your “**BINDER TEMPLATES**” folder. Open it, and copy the applicable template.

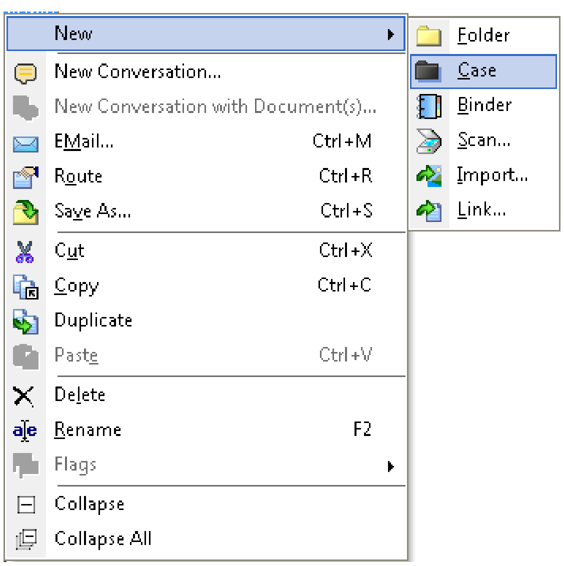
2. Right-Click on the Clients folder. Paste your Template into the Client Folder or desired subfolder.

3. Rename the Folder by typing in the File name. (This is no longer a template, so it shouldn’t be named as such.)

NOTE: If your firm has decided to backscan all or some client files, we don’t recommend you create all the client folders with binders right away. Wait until your entire firm has been using Primafact for a few weeks or a month. It happens quite frequently that the binder templates are changed once everyone is using Primafact.

Opening a new Case

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



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.

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 Scanning**	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	When scanning with a TWAIN Scanner.
Bring Paper documents into Primafact using a networked scanner	**Paper**	**Scan + Document 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)**	**Document 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 TIF document sets (already scanned by firm or provided by external parties)	For these file types: **.PDF .TIF** **.JPG .BMP**
Bring an email or Word document into Primafact	**Any document you would otherwise print & scan**	**Print to Primafact** **(P2PF)**	Converts documents into static Primafact documents	Using **File** > **Print** from any printable application (e.g. Outlook, Word, Web Browsers)	Creators of new documents – eliminates need to print and scan	For internally-created "final" documents, or Outlook emails. (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 ***<u>or</u>*** 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)

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. 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.

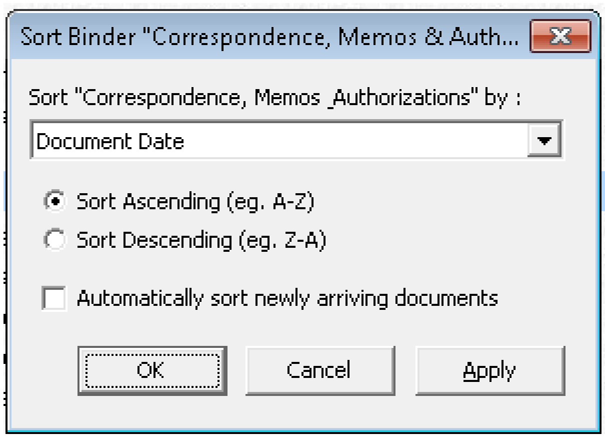
Sorting re-orders your documents within each tab/section/subsection (documents will not move to different tab or section locations during a sort). Individual documents can be repositioned manually after the sort.

Note: You cannot "UNDO" a sort.

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).

The Filing Center

The Filing Center is a separate Primafact window designed to streamline document intake. Each user has his/her own Filing Center.

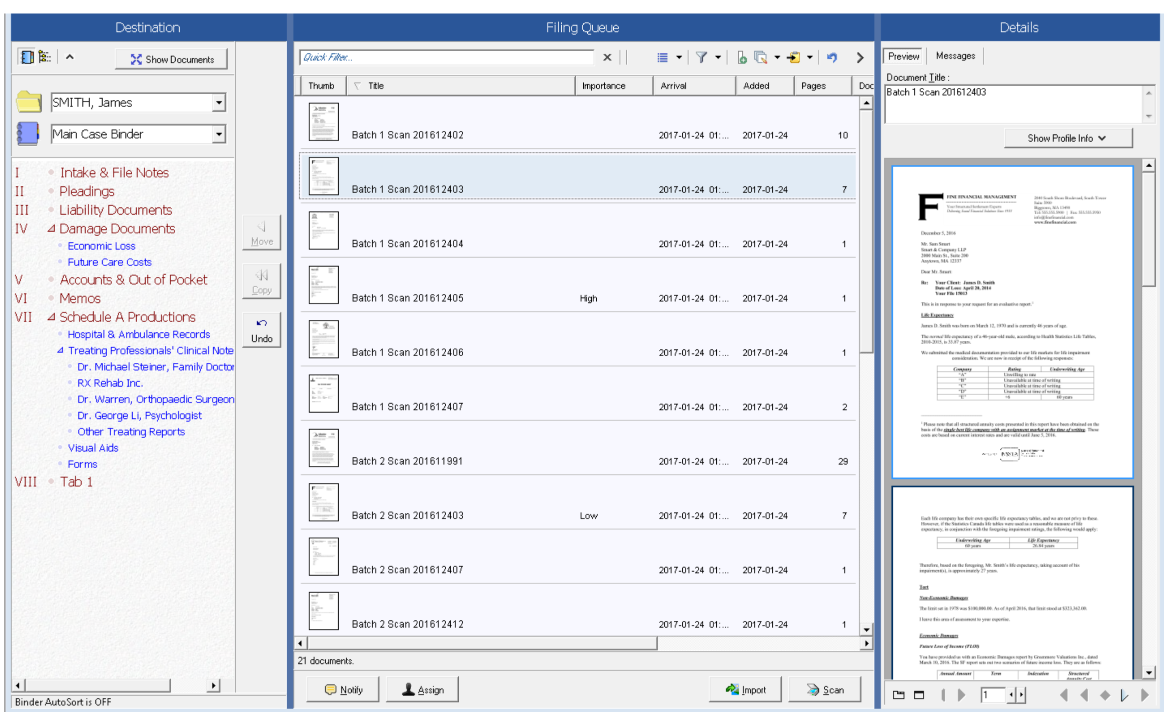
Opening the Filing Center

You can access the Filing Center using the Filing Center icon at the top-left of your toolbar in Explorer view, or on your Shortcuts pane:

Getting Around the Filing Center

The Filing Center is divided into three sections:

- **Destination** Pane (Left Panel) – this lets you see the Binder where you will be filing your document(s)
- **Filing Queue** (Middle Panel) – this where you find your new documents for filing
- **Details** Pane (right Panel) – this panel provides a preview of your selected document allowing you to review the document, associated messages and profile without having to open your document.



You can hide the **Details** pane by clicking the **>** button on the far-right of the toolbar at the top of the filing queue:

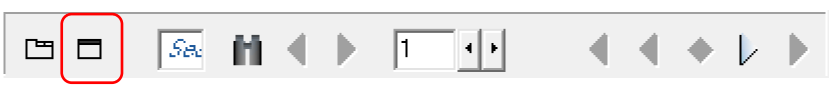
You can reveal the collapsed **Details** pane again by clicking the **<** that will appear on the toolbar when the pane is collapsed.

Filing a Document

Naming and Coding your Document

First, you will name your inbound document.

1. Start by ensuring your Details pane is displayed. (If it is not in view, select the **<** button at the top of the Filing Queue toolbar.)
2. Select the document you wish to name.
3. Make sure the Document is displayed in the preview area of the Details panel. (You can resize the panel and zoom the document size to see more detail; alternatively you can open the document using the ***Open document in window*** button at the bottom of the Details Pane:



4. Click inside the **Document Title** box at the top of the Details panel. (Alternatively, type the **F2** key.)
5. Type the name of your document and click **Enter.**

Adding Profile Information (optional)

You may add profile information prior to filing if desired. ***To Batch-Code Documents, see Batch-Coding documents, below***. To code the individual selected document:

1. Click the **Show Profile Info** button.

2. Enter the desired document information into the applicable profile field. *If you do not see the Profile Field you are looking for, select the appropriate category from the **Show fields from category** dropdown to reveal additional profile fields.*

Assign filing to another user (optional)

If another user will be doing any part of the document filing, click the **Assign** button at the bottom of the **Filing Queue** pane and select the desired user.

The selected document will move from your Filing Queue into theirs.

Notify another user (optional)

You should notify other users (*e.g.* responsible lawyer or paralegal) of incoming documents that they need to know have arrived.

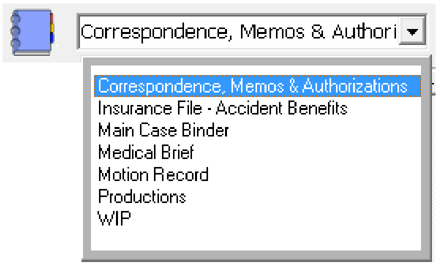
1. Select the named and coded document in your Filing Queue.
2. Click the **Notify** button at the bottom of your screen. (It's generally easiest to Notify the user ***before*** filing your document in the case binder, but the Case association is created after the document has been filed; if you prefer you can right-click on the filed document in the Destination pane and select ***New Conversation with Document(s)***.)
3. Fill in the Message and recipient information.
4. Click **Send**.

(***NOTE:*** We recommend that you habitually review your incoming documents ensure that documents requiring immediate attention are identified, and the person responsible is notified right away, so valuable time is not lost for time-sensitive items.)

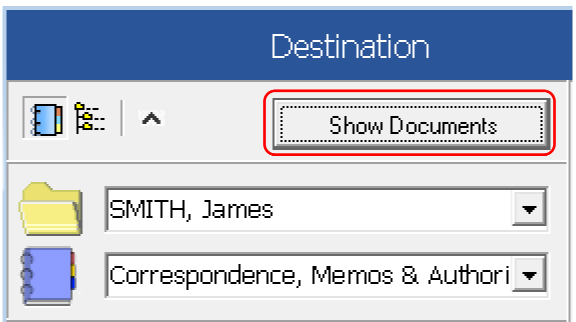
Moving your document to the desired destination binder

1. Select the destination Case from the Case drop-down at the top of the Destination window. (You can start typing the first letters of the file to narrow your list).

2. Choose your desired binder.



Select the **Show Documents** or **Hide Documents** button at the top-right of the Destination Pane to collapse or expand Tabs and Section headers.



(Note: Binder Auto Sort will be displayed as **OFF** or **ON** in the bottom left corner of the Destination Pane.)

3. Click the desired document in the Filing Queue.
4. Click the desired Tab or Folder in the Destination Pane.
5. Click **Move** or **Copy**. (Alternatively you can drag your document to the desired location in the Destination Pane. This is treated as a **Move)**.

NOTE: To move multiple documents at once, depress your **CTRL** key while clicking each selected documents using you left mouse button.

Naming New Documents

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

All new 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. Press F2 (or right-click the document, and select **Rename**) and type in the name of your document.

Importing New Documents

Primafact's Import feature lets you bring electronic files directly into Primafact. Files can be imported to the File Center using the Import button, or to case binders using the Import menu.

You can also Drag & Drop to import documents directly to case binders from emails, your desktop, or Windows Explorer.

NOTE: 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.

Import Documents to the Filing Center

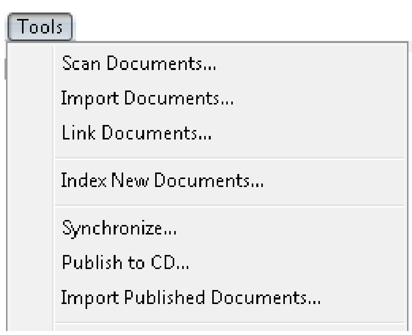
To import new documents to the Filing Center:

1. Select the **Import** button at the bottom of the Filing Queue pane.

2. Navigate to the desired Windows folder location.
3. Select the desired documents using the checkboxes. (Right-click and choosing **Select All** to Select all documents in a folder.)
4. Click the Import button.
5. The import dialog will open. When import is complete, click **Close**.

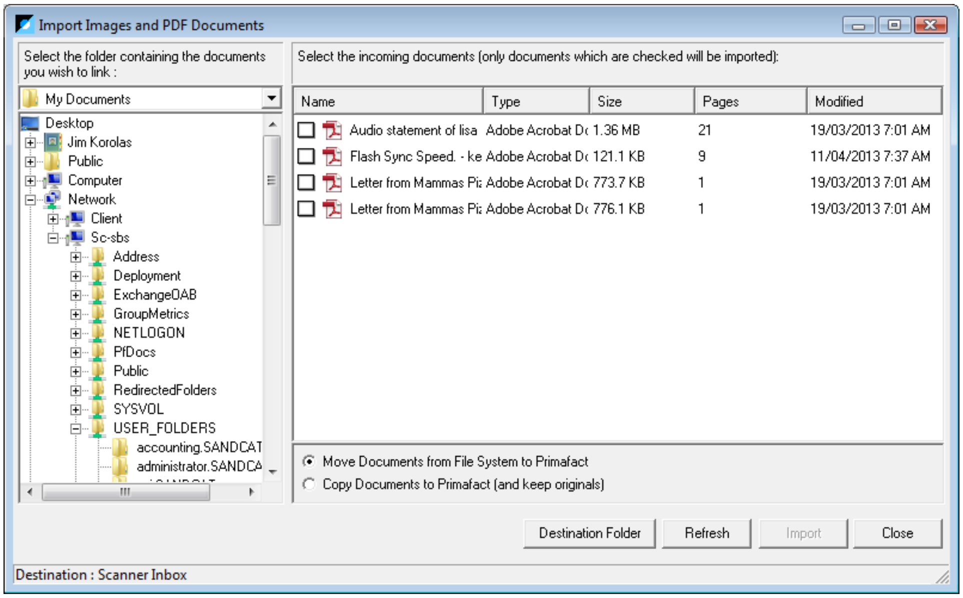
Import Documents to Primafact Case Binder

1. Select the desired tab or section destination in Primafact.
2. Click on **Tools** -> **Import Documents**.



(Alternatively, right-click, select **New** → **Import**)

3. 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.

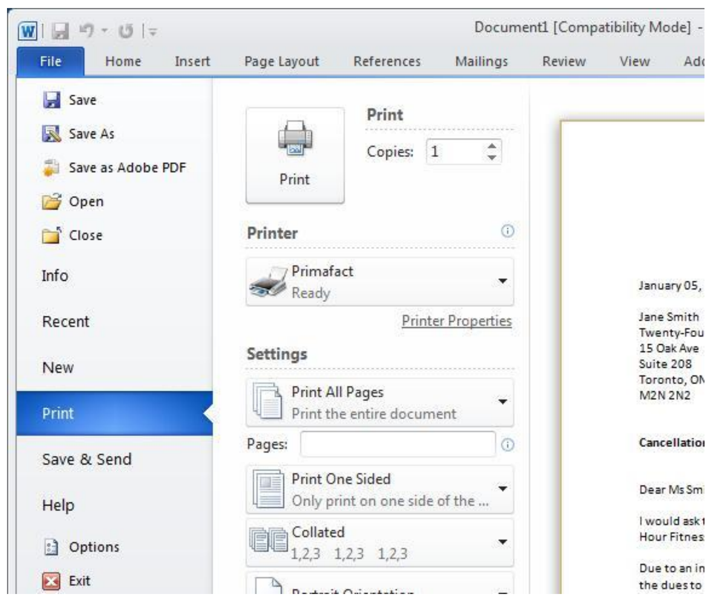
Printing to Primafact from Windows Applications

Print to Primafact saves you from printing and scanning documents that need to be in Primafact. Print to Primafact uses a special print driver that creates a file that you can save in Primafact. Documents can be printed directly into Primafact from any Windows application that supports printing (e.g. – Word, WordPerfect, Outlook, or any page on the Internet).

1. Open a Word document with Microsoft Word.
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.

   Press OK.



3. Primafact will open a window allowing you to choose a destination within Primafact to save the printed image document to, as shown on the image below - select the destination folder, and click on “OK”:

It is recommended that you name the document with the appropriate name in the “Document Title” area in the above window. If the document was saved already in Word, the name will display in the above field.

A way to save time getting Word documents into Primafact is to name the documents in Word the same way you must name them in Primafact. That way you don’t have to rename them in

Primafact. It also helps to standardize naming conventions in the firm, as there will be only one way to name documents.

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.

Document Copy & Duplication

Copying vs. Duplication

Primafact 5 includes the ability to "Duplicate" documents (or even tabs and binders).

Unlike copying, which allows the same instance of a document to appear in multiple folders, duplication creates a unique document that matches, but is completely independent of, the original.

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
- ✓ 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.
Any changes you make to any “copy” is done to all “copies” in the database. However, you can delete single “copies” of any document that has been copied.

Importing Email (Outlook Integration)

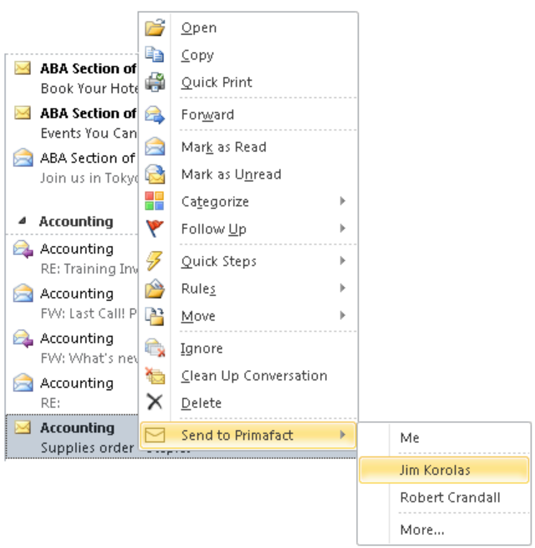
The Primafact Add-In lets you easily import email from Outlook. You will need to have the Add-In installed to access the Outlook Integration features.

Send to Primafact from Outlook

This import option allows you to send your email (with or without attachments) directly to someone’s **Filing Queue** in the Filing Center. 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 Filing Queue.

Drag and Drop from Outlook

You can also import an email by dragging it directly from Outlook into any Primafact binder (Binder View recommended). Attachments 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 added-to incrementally over the lifetime of a file.

To Merge two documents into one:

1. Left-click on the document that will comprise the first pages of your merged document. The document will take the name and location of the document that appears closest to the top of the binder index. The selected document appearing below this document will be merged after the higher document.
2. Press and hold the CTRL key and elect the next document that you wish to merge into the first. Repeat as necessary.

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

Extracting Documents

Extracting is the opposite of merging. By extracting pages from a document, you can turn a single document into multiple documents.

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 used if you accidently merged the wrong documents – to split them up again.

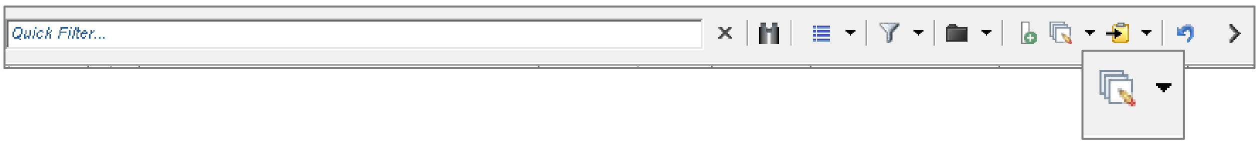
To extract pages from a document:

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

3. Right click and select "**Extract Pages**" from the context menu.
4. The extract dialog will open.
5. 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).
6. 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.
7. 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.

Batch Profile Updates

You may now change the content of Profile fields on multiple documents at one time using the **Multiple Updates** button on the **List** view.

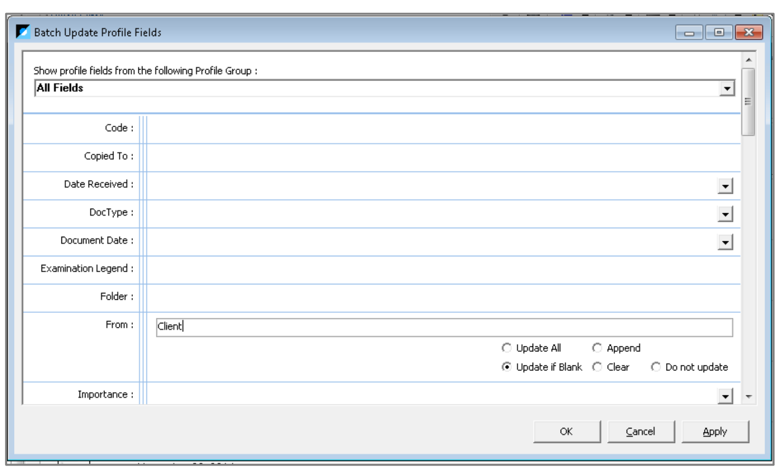


Complete a Batch Profile Update

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.

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

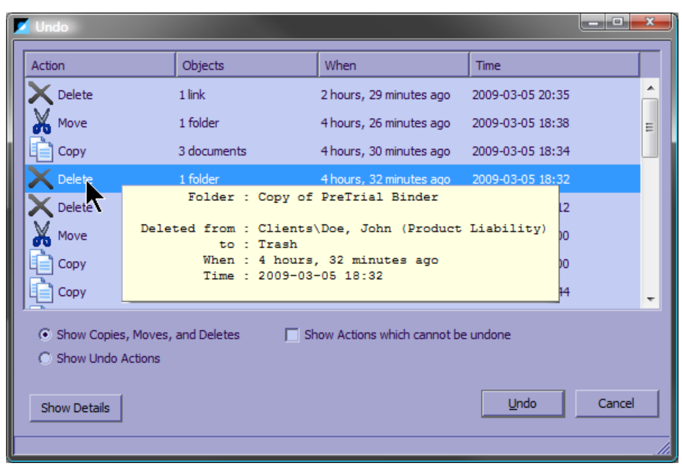
You cannot undo anything else in Primafact.

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**.

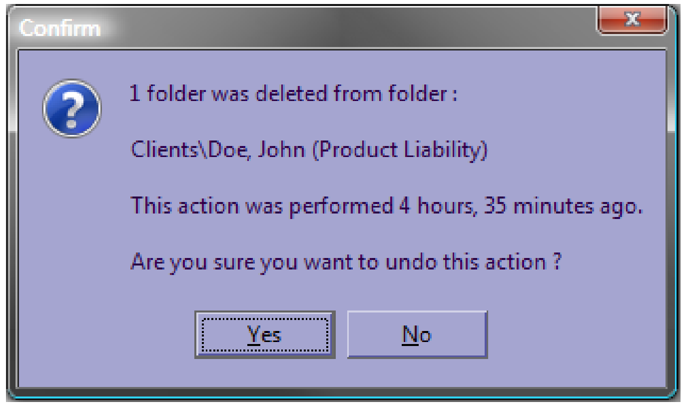
1. To access the Undo dialog, select Edit > Undo from the main menu while in the Explorer view. You can also press Ctrl+Z.

   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.

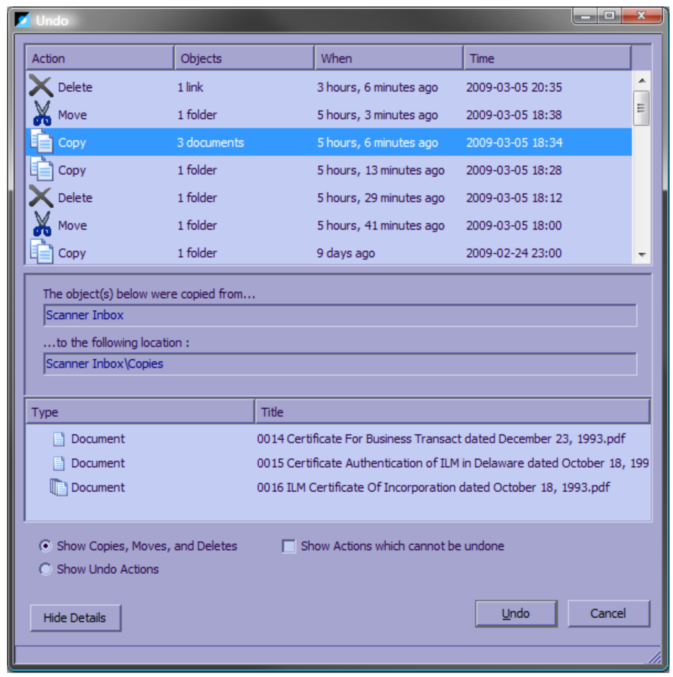
   In this example, "Copy of PreTrial Binder" folder was deleted from "Doe, John Product Liability)" 4½ hours ago. By undoing the deletion, the folder is moved from the trash to "Doe, John Product Liability)".



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 is no longer in 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.



Part 3: Sharing and Messaging

Primafact Inbox

The new Primafact Inbox is designed to improve document-related communication and workflows using a built-in messaging app limited to users within the firm.

Desktop Inbox and Messaging

The Desktop Inbox can be accessed using the Inbox tab (beside the Explorer Tab under the main menu.)

Your messages can be sorted by Recipients, Case, Date and Attachments, Grouped, Flagged and Filtered.

Message Notification

The Inbox tab now displays the number of unread messages in your inbox with a bracketed number at the right of the tab.

The Messaging Toolbar Ribbon

The messaging toolbar ribbon (below the Primafact tabs) allows you to manage and filter conversations.

The **Quick Filter** field lets you filter emails by a selected word or phrase *e.g.* ***Becker*** will eliminate any message threads without "Becker" anywhere in the conversation.   Select the **X** button to remove the Quick Filter.

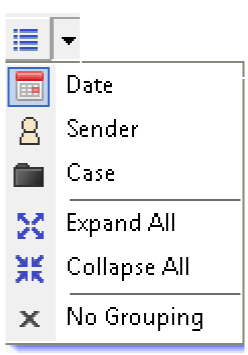
Start Conversation

Add to conversation

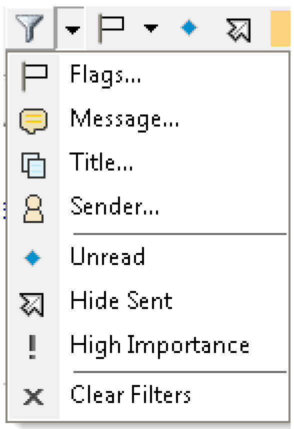
Delete Conversation will remove a conversation (message thread) from your inbox.

However, you will still receive future messages on that thread.

Unsubscribe from conversation removes you from the thread, so you will not receive future messages on that thread unless another sender reinstates you on the thread.



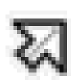
Groupings allow you to group your Inbox messages by **Date**, **Sender** or **Case,** as well as **Expand and Collapse** headers.



The Filter dropdown allows you to filter by other criteria, including Flags, Message, Title, Sender, Read/Unread, Messages Sent by you, and messages of High Importance.

The Flag dropdown allows you to filter by assigned flag color.

The **Blue Diamond** allows you to display or hide **Unread Messages** only.



This button allows you to hide or display Conversations where you composed the last Message

Refresh List

Hide/Display Conversation

Marking a conversation

Right-click on conversation. Mark message as desired from the available options.

Starting a Conversation with a document attachment

When this application has been fully developed, it will be possible to add documents to messages from within the Inbox. At this time, however, you will need to start a conversation with a document attachment from within the Binder view.

To send a message with a document attachment:

1. Select and **Right-click** on the desired document(s) within the Binder
2. Select **Send Message** from the drop-down menu
3. The **Send Message** window will open:
4. Add your recipients to the To: field by typing part of their name – potential recipients matching your typed selection will appear as options.
5. Add your Message to the **Text** field.
6. When complete, press **Send**.

Receiving New Messages

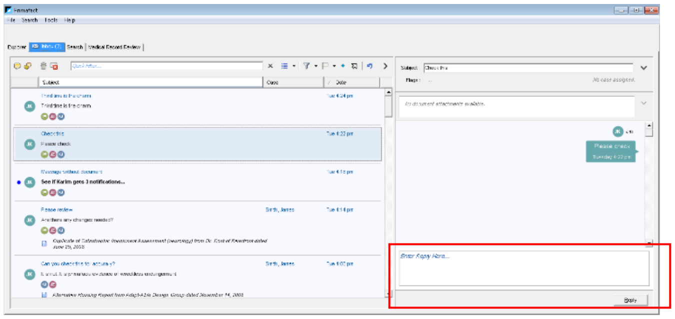
New Messages appear in your inbox with the Message bolded and marked by a blue dot in the left margin.

The message thread should appear in the area to the right.

If the message thread is not displayed, ensure your “Hide conversation” button in the messaging toolbar ribbon is pointing right. 

Replying to Messages

Just start typing in the *Enter Reply Here… area* (it’s at the bottom of your message screen) or select the **Reply** button and start typing directly in the Reply area.



iPhone Inbox

The iPhone Inbox is the mobile counterpart to the Desktop Inbox – and is a vital workflow tool for professionals on the move. It is designed particularly to ensure that staff can stay connected, even with key team members frequently out of the office, with ready access to case documentation and file status.

The Primafact Inbox can be accessed from the home screen of the Primafact iPhone app.

Selecting the Inbox takes you to your message list.

Organizing Messages

The Inbox messages can be sorted and filtered using the buttons on the bottom:

The second button from the left allows you to group messages by **Date**, **Sender**, and **Case**.

The middle button will display your user initials. Select it to include or remove messages with you as the last sender.

The flag button, second from the right, allows you to filter messages by the flag color. You may filter by multiple flags at a time.

The last button in the list allows you to expand or collapse messages under the displayed groupings.

Composing Messages

You may compose a new message at any time using the **Add Message** button, which always appears at the bottom left of the screen (it becomes a transparent blue over documents)

To send a message, simply tap the **Add Message** button. The Message Screen will appear.

Composing Messages with document attachment

At this time, you can only associate one document in a single message thread at a time from the mobile app.

To start a message with a document attached:

1. Open the desired document.
2. Tap the **Add Message** button at the bottom of the screen.
3. The **Compose** window will open.
4. Select recipients by tapping the **To** field and selecting from the available options (you may scroll through the list by swiping horizontally.)
5. Compose your message in the Message field.
6. You may use on/off switch below the Message field to mark your message with High Importance, or add Flags using the ooo button.
7. 

`
8. When complete, press Send on your keyboard.

Emailing and Routing

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 – use SHIFT or CTRL to select multiple documents. 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 or CTRL-R.)

2. If you are routing, the e-mail window will appear with one attachment for each document you highlighted.
3. If you are e-mailing, you will see the Emailing a Document from Primafact dialog. You can also select 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. The recipient will be able to navigate each document using the Bookmarks pane in Adobe Acrobat Reader. If you select Multiple PDF Documents, one 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.

Part 4: Assembling Productions

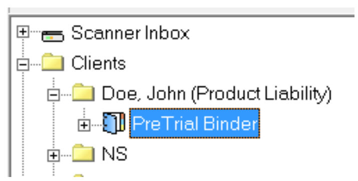
Copy Binder Index

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

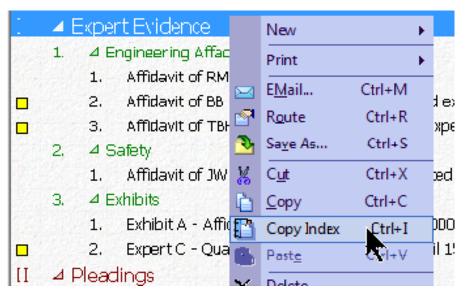
To copy a Binder Index:

1. Select the desired binder in the Explorer View.

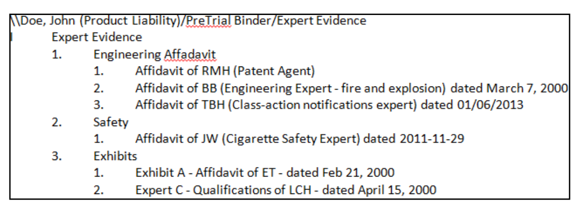
   You can also select a tab or section in a binder to copy the index from.



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 not 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. Binders that are complete (for example a submitted brief) can be locked so that no further changes are allowed.

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

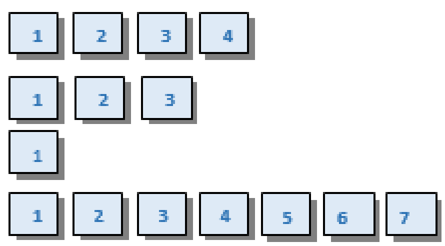
  e.g. In a 4-document tab with Document 1 (4pp) Document 2 (3pp), Document 3 (1p) Document 4 (7 pp) the pages would be numbered as:

  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.

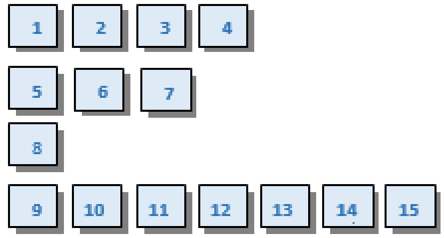
  e.g. In a 4-document tab with Document 1 (4pp) Document 2 (3pp), Document 3 (1p) Document 4 (7 pp) the pages would be numbered as:

  Doc 1: Pages 1-4

  Doc 2: Pages 5-7

  Doc 3: Page 8

Doc 4: Pages 9-18



- **Restart numbers on each section**

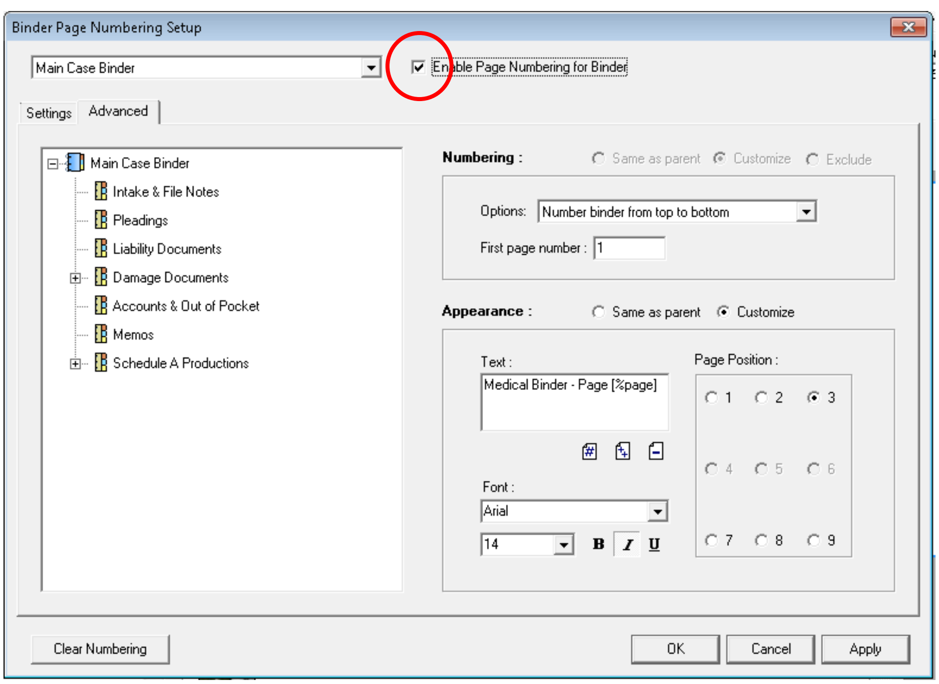
  This numbers each document within a Primafact ***section*** starting at Page 1 of the first document, continuing without interruption across documents, similarly to "Number tab from top to bottom".

  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).

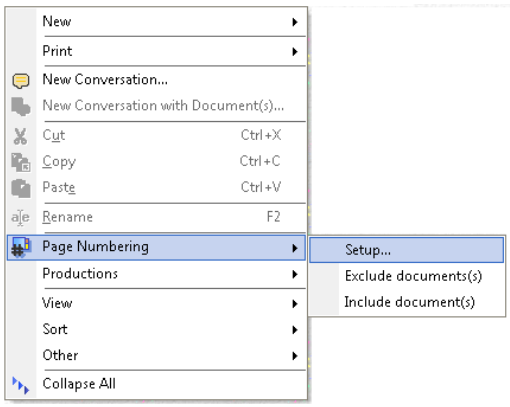
1. This will bring up the **Binder Page Numbering Setup** Window.



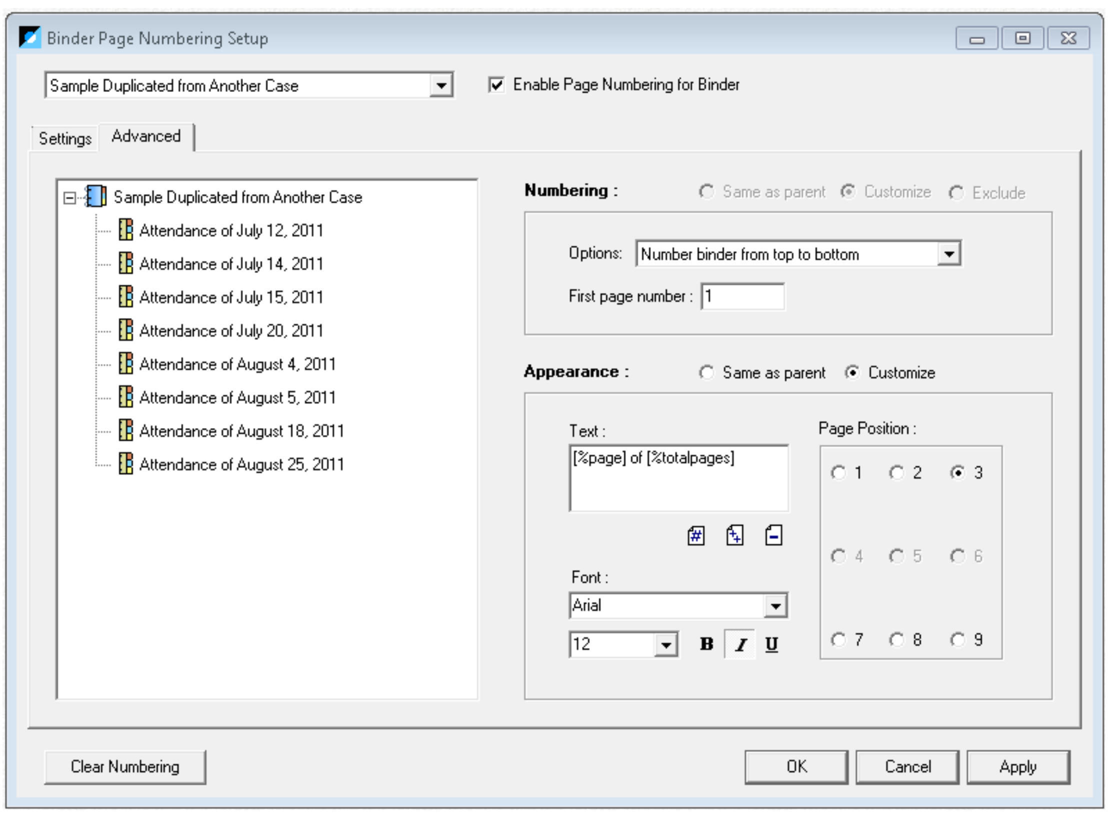
2. Select (Click) the **Enable Page Numbering for Binder** checkbox. Click **OK.**

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

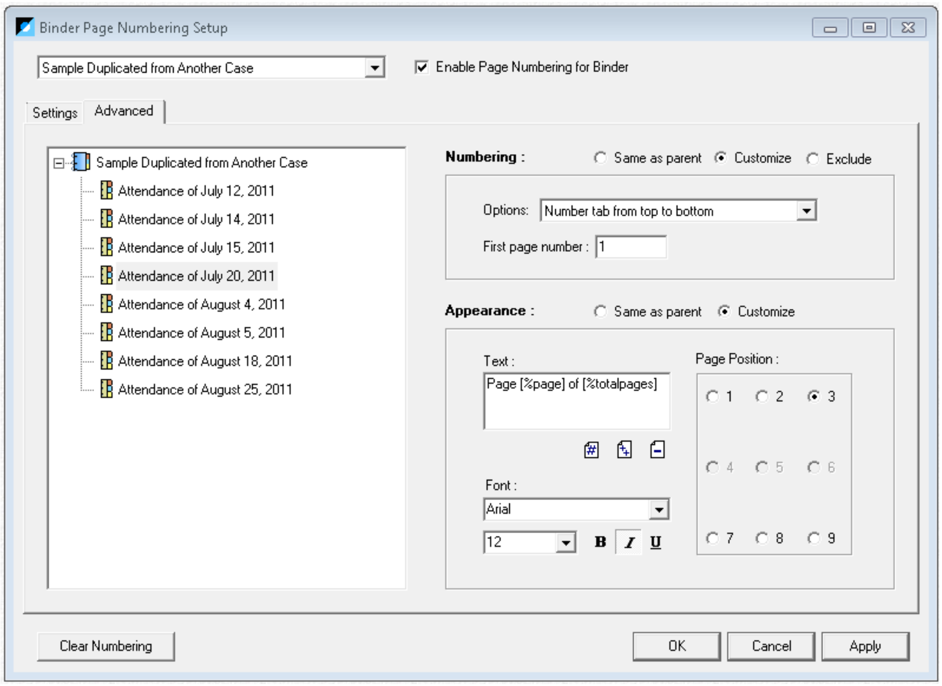
7. Select the Position in the Page Position Area (the buttons indicate the location on the page where the number will be displayed - #3 is top right, for example.

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 binder:



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 numberstamp.

A note about section numbering:

The Total Number of Pages in the binder will always include ALL pages (except excluded pages), including pages numbered separately within a tab or section.

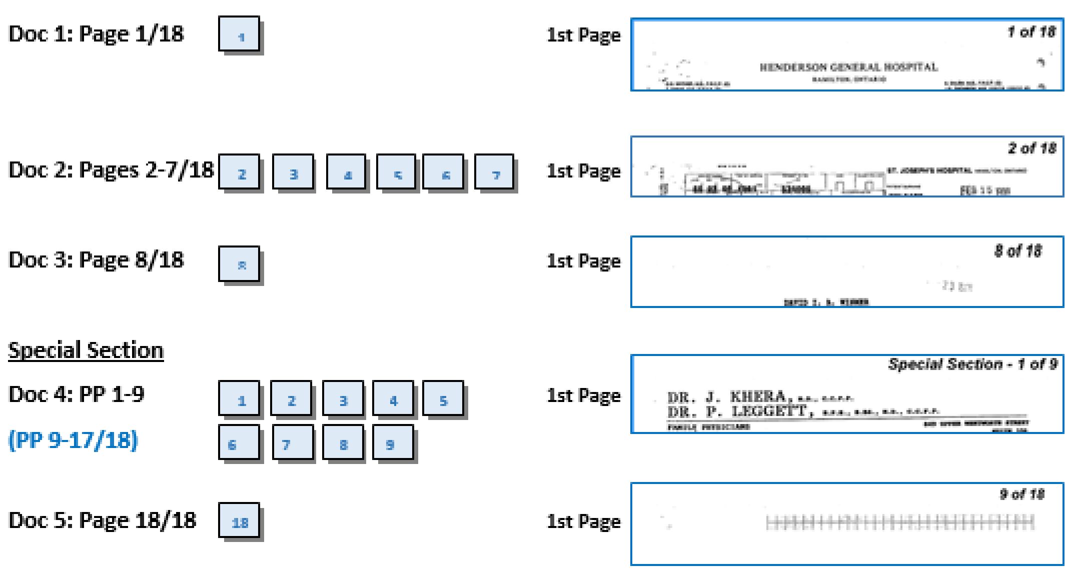
You may choose to number a tab or section separately from the rest of the documents in a binder – for example number your binder "Top-to-bottom" but have a document in the middle that needs to be numbered individually, using Section Numbering.

In this case, the Total Number of Pages will include the pages within the separate section. The first page after the separate section, will continue at the number of the last numbered page (prior to the Separate Section) + the number of pages within the section.

e.g. You have a 5-document binder with Document 1 (4pp) Document 2 (6pp), Document 3 (1p) Document 4 (7 pp) and Document 5 (4pp).

You are numbering the binder top-to bottom BUT want to number Document 4 differently from the rest of the binder, as its own unit.

Here's how the pages will be numbered:



Excluding Pages from Being Numbered

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

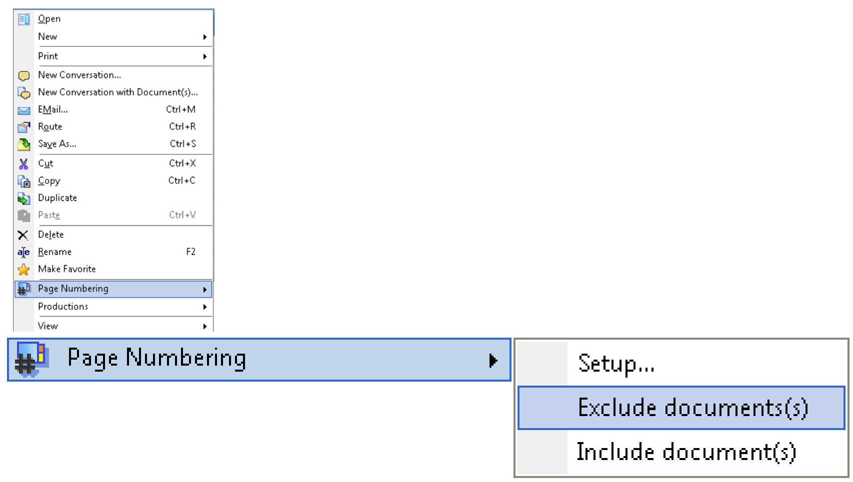
Keep in mind that the total number of pages in the document will not be included in the total number of page of that document set. (For you Harry Potter fans, it's kind of like an invisibility cloak – the document is there, but the numbering system doesn't notice).

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).

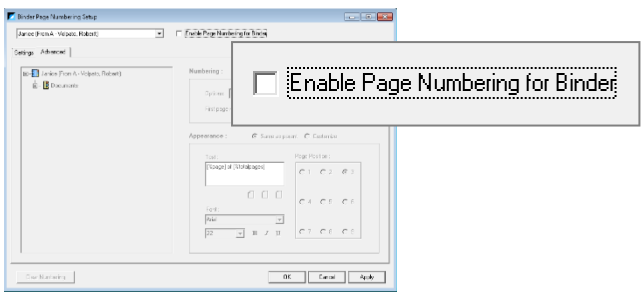
Turning Page Numbering Off

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.

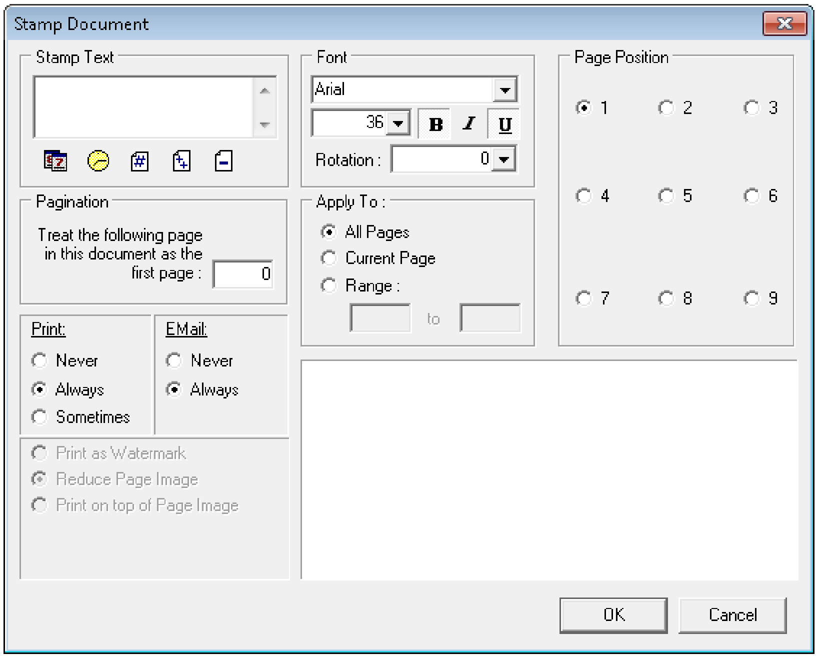
NOTE: Turning Page Numbering Off is different from "Clear Numbering" (button at the bottom left-corner of the window), which will remove all the number formatting you have applied to the binder.

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.

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, although individual pages may be numbered in a document (following a Merge). 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.

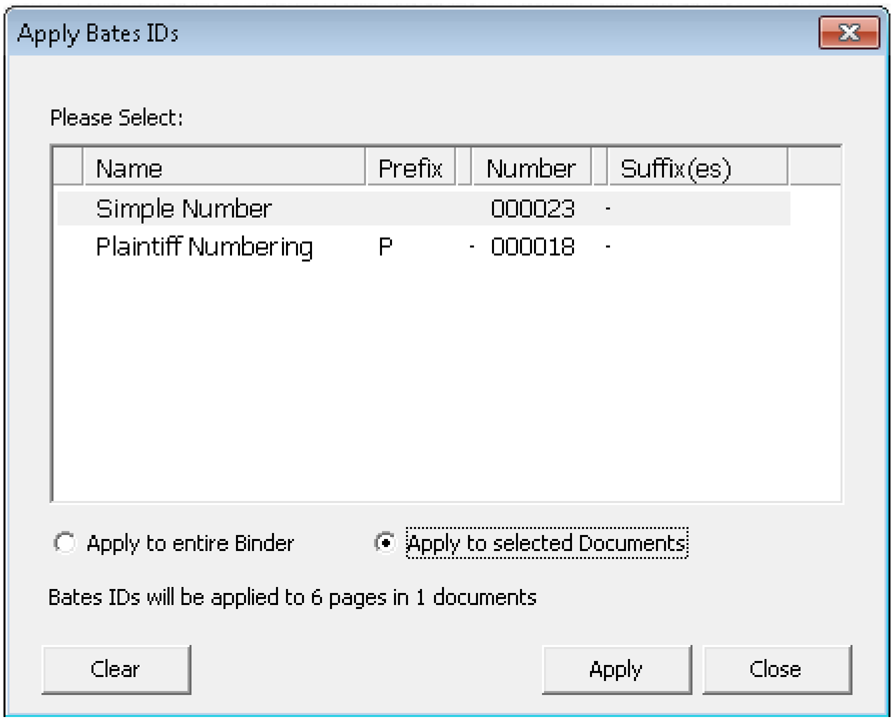
Bates IDs are not available in a case until they are set up.

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:

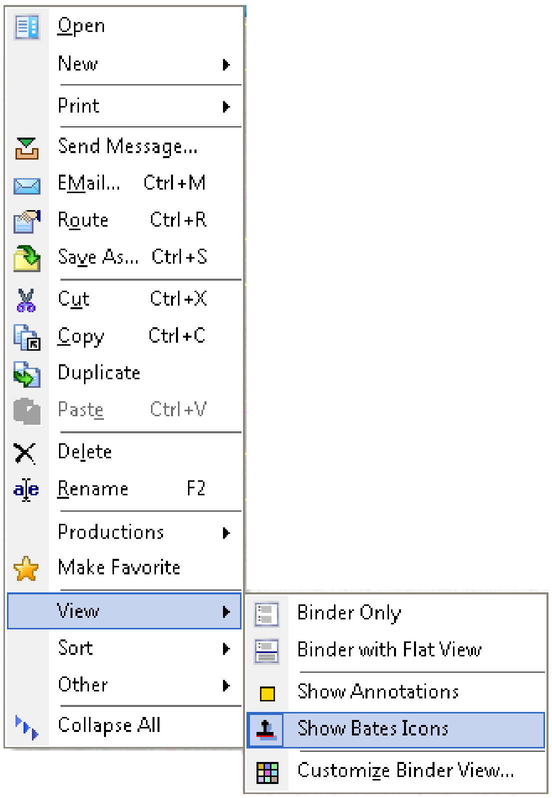
1. Within the Binder View, select your document(s), right-click and select **Productions > Apply Bates IDs** from the drop-down menu.
2. The **Apply Bates IDs** window will open.



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).

Determining 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**.

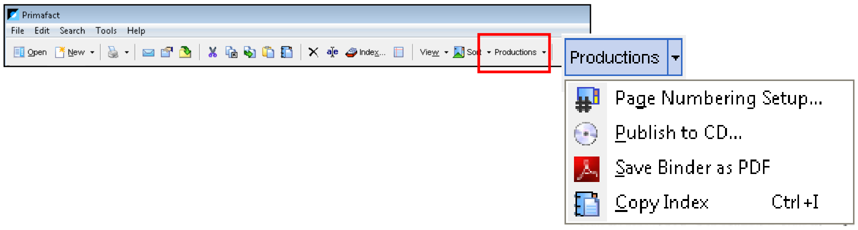
Saving Binders to PDF

Saving Binders to PDF format allows you to share your Primafact binders with recipients who do not want to receive case materials in *Publish to Primafact* format.

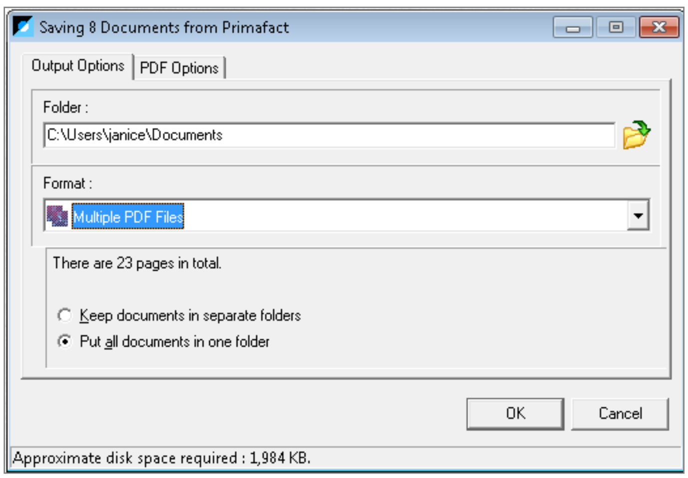
By default binders are saved as a single PDF. If Page Numbering has been turned on for the binders, this numbering will be included in the saved PDF. (Page Numbering can be turned off prior to saving to PDF if desired).

To save a binder to PDF:

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



The Binder Save window will open.



2. Select where you will save the folder, and how you wish to format your Binder (Multiple PDF files or original documents.

3. The **PDF Options** tab also has some formatting options, including whether to include Annotations in the PDF document(s). (By default, Annotations are excluded).

Note: Production numbers will be included, if turned ON. Bates Numbers are always included. Redactions are always included in Binders saved to PDF.

Publishing Documents to CD/Memory Stick

Primafact's Published CDs are used to exchange document sets with expert witnesses/other firms/your clients. Published Primafact CDs package your documents with a built-in viewer which allows the recipient to view all the documents directly from the disc without the need to install Primafact software. Linked documents (e.g. Microsoft Word files), will require that the recipients have the necessary software installed on their computers.

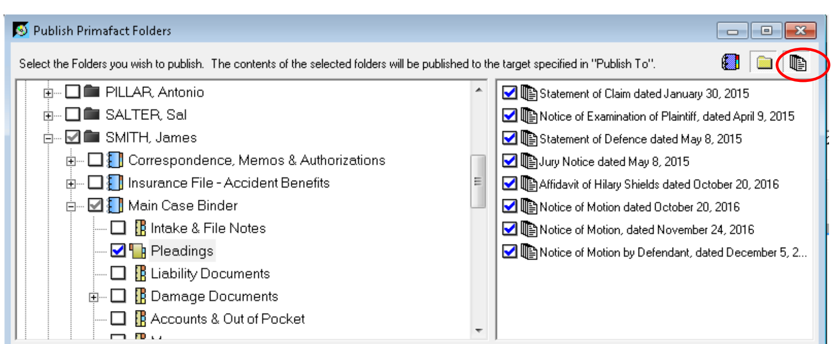
What gets published, and what doesn't:

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

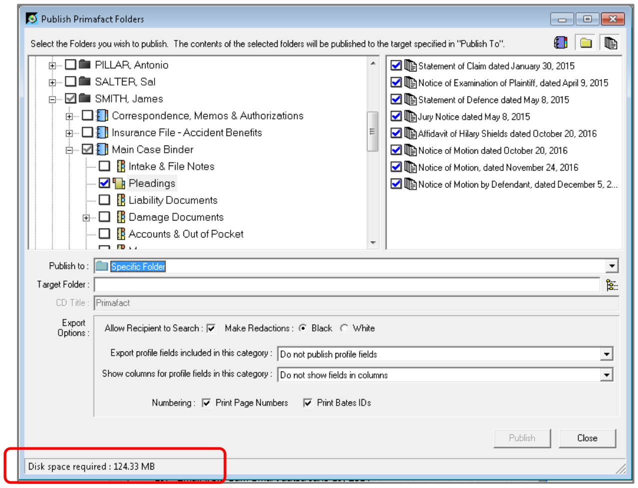
Publishing Directly to CD/DVD

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

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.



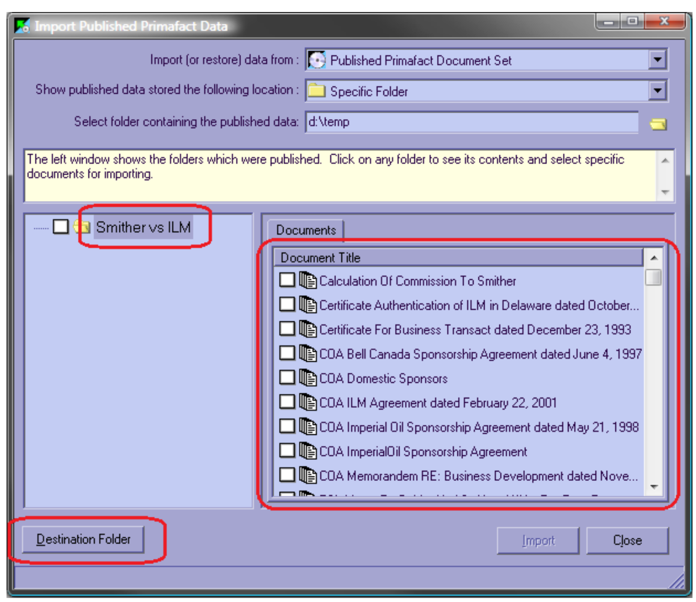
The status bar (bottom left-hand corner of the Publish window) shows how much space and how many discs the published documents require. This is an estimate.



Importing a Primafact CD

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

1. Insert the CD/DVD you received from another law firm using Primafact.
2. From the main Primafact menu, select **Tools** > **Import Published Documents**
3. 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).



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

Part 5: Document Review & Analysis

Searching

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

- ✓ Filtered Lists for Documents and Annotations (*See Filtering List Views* in **Part 1**, *above*)
- ✓ Quick Search (to identify document titles and section headers in Binders – searches titles only)
- ✓ Find Folders
- ✓ Using the Search Tab
- ✓ Searching within a document

About Searching

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.

Quick Search

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

1. The Quick Search field at the top of the binder view allows you to quickly jump to documents containing specific text in the title.

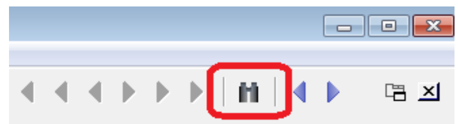
2. In the Quick Search field, type part of the title for a document, tab or section. Press the Enter key, or click the Find button.

3. Click the Find button or press Enter again to go to the next match.

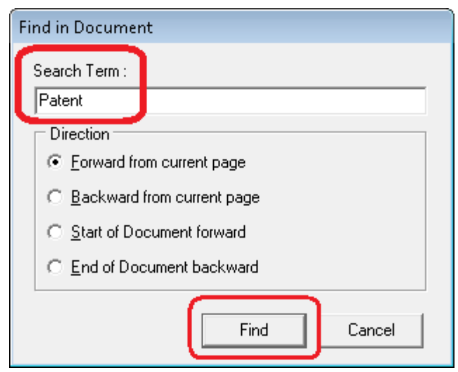
In-Document Searching

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).

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**.



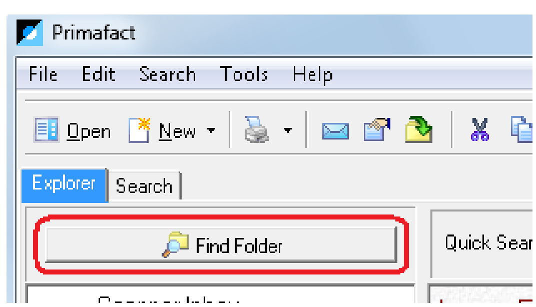
3. Click the Find button.

   All matches will be highlighted in bright green. Bright green arrows indicate more matches on other pages

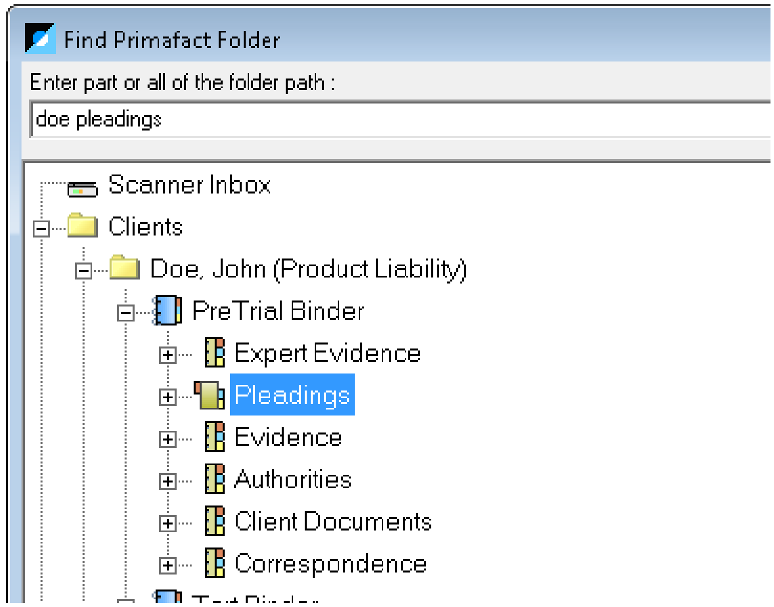
Find Folders

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 in all or part of a folder, binder, tab or section name and press Enter. The first match will appear.

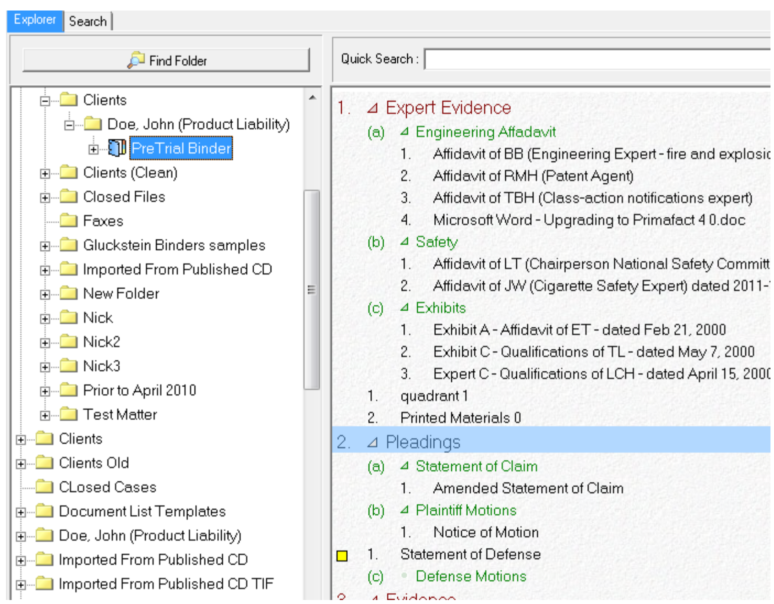


3. You can search for multiple folder names.

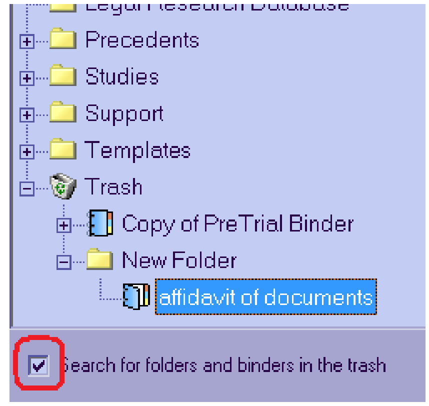
   For example, you can use the name of the client and the word “pleadings”. In the example here, **Pleadings** in the **Doe** case comes up as the first match.

   When you find the folder you want, double click on it, or click the Select button.

4. When you select a tab or section, the binder view will open with the selected tab or section highlighted.



5. If you are looking for a misplaced folder, you should make sure **Search for folders and binders in the trash** is checked prior to executing the search. If this is checked, matching items from the trash will be shown.

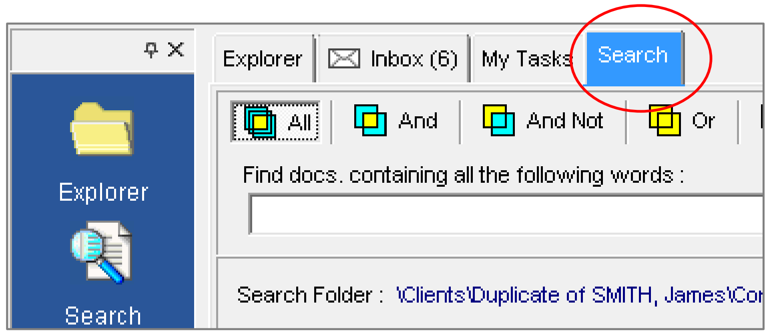


Using the Search Tab

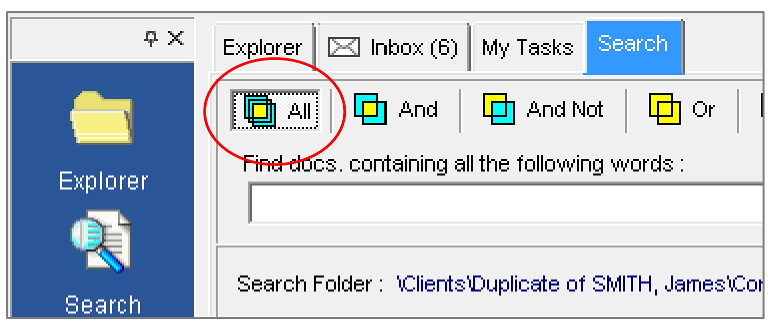
The Search tab by default searches the currently selected folder (selected in the Explorer Pane). You can search the whole database by selecting "All" folders.

Basic searching

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**

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.

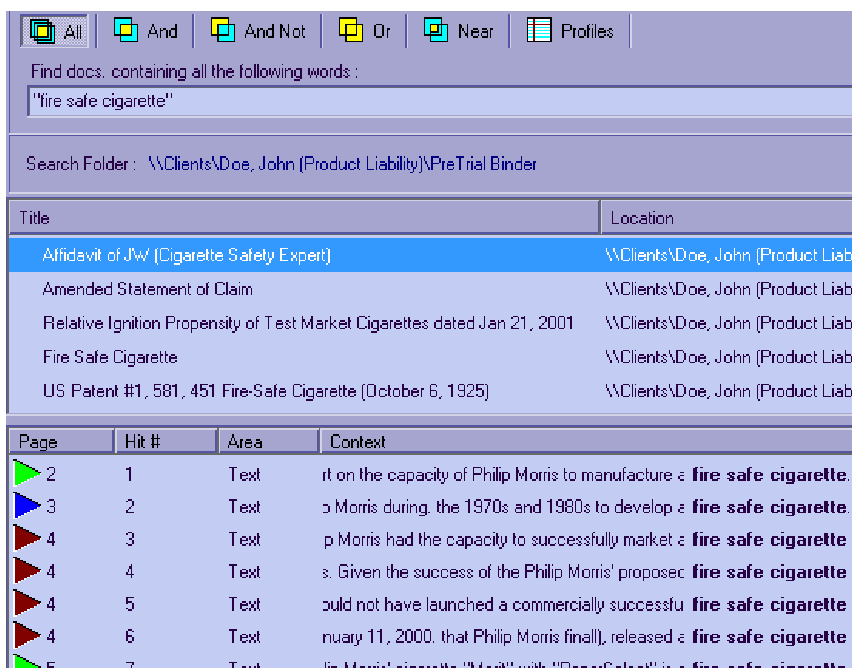
Working with Search Results

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.

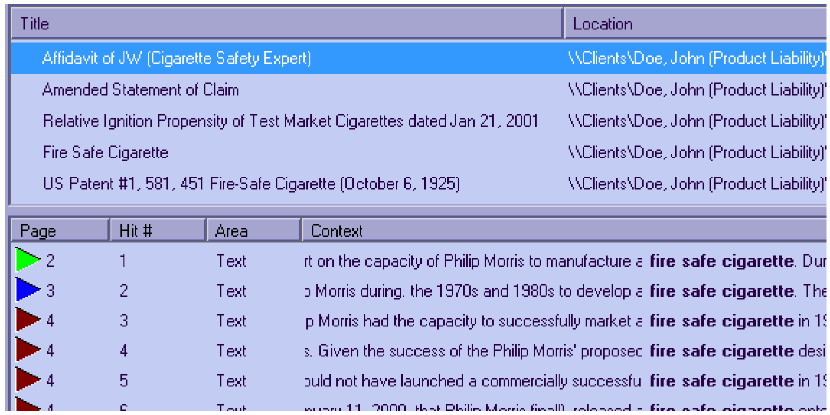
By default, documents are sorted by the number of hits – greatest to least. You can change the sort by clicking on one of the other column headings. For example, clicking on Added will sort the documents from oldest to newest. Clicking on page number will show search results by largest documents.

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

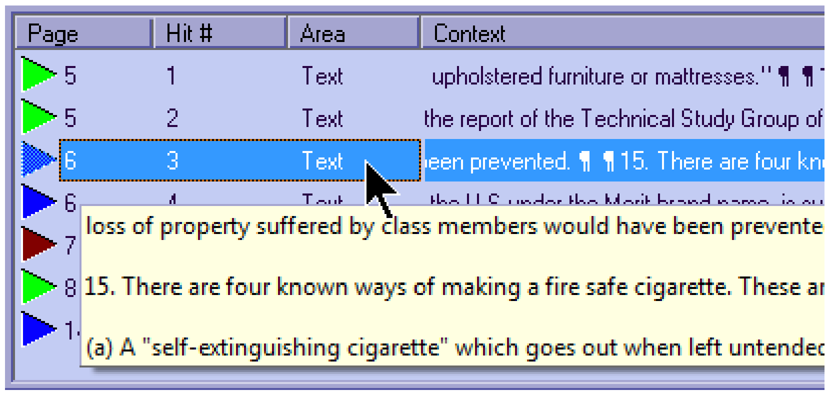
Coloured arrows indicate a page grouping - in this example, there are four hits on page 4.



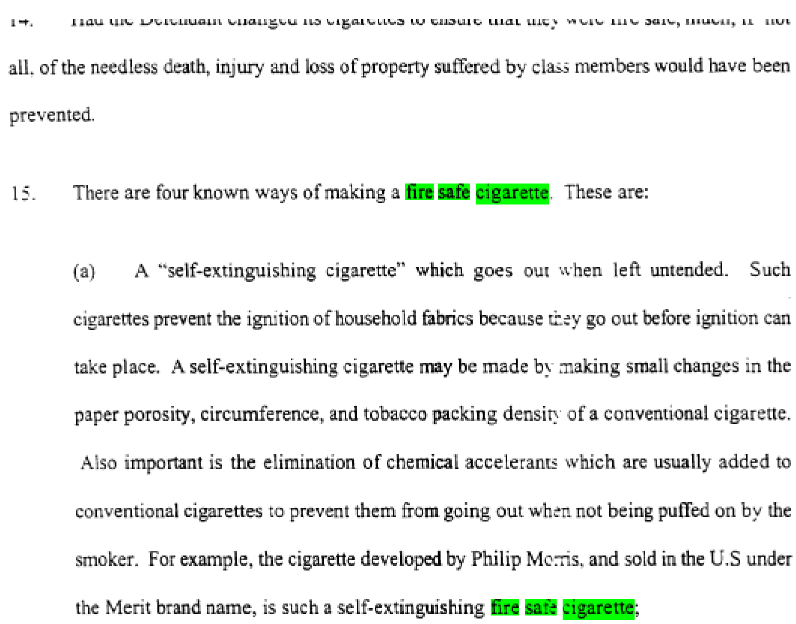
1. Click on a document name in top pane to reveal hits by context in lower pane.



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 searching

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.

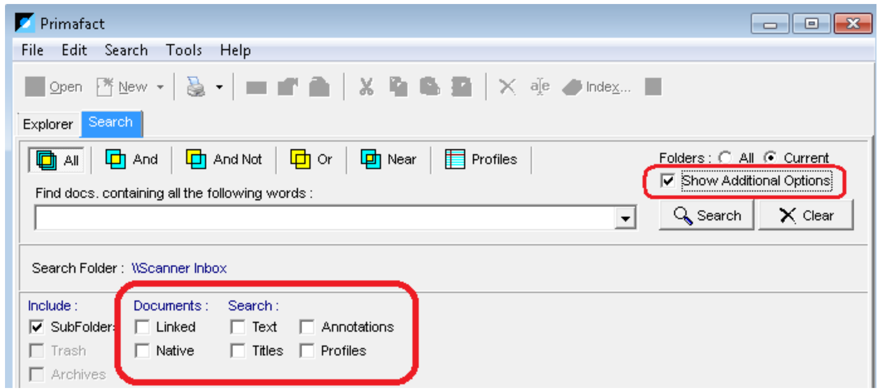
A question mark (?) may be used as a "wild card" to replace a specific character in a word. It will replace only one letter at a time, in the exact location within the word. You may use more than one question mark within the same query.

For example:

- **L?W** will find words like law and low, but not words like Laidlaw.
- **bur??r** will find words like burger and bursar, but not burgr [sic].

Types of content you can search:

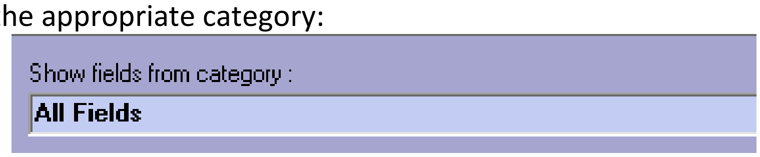
If you put a check in the Show Additional Options box, you will have additional options available that will allow you to search for specific content:



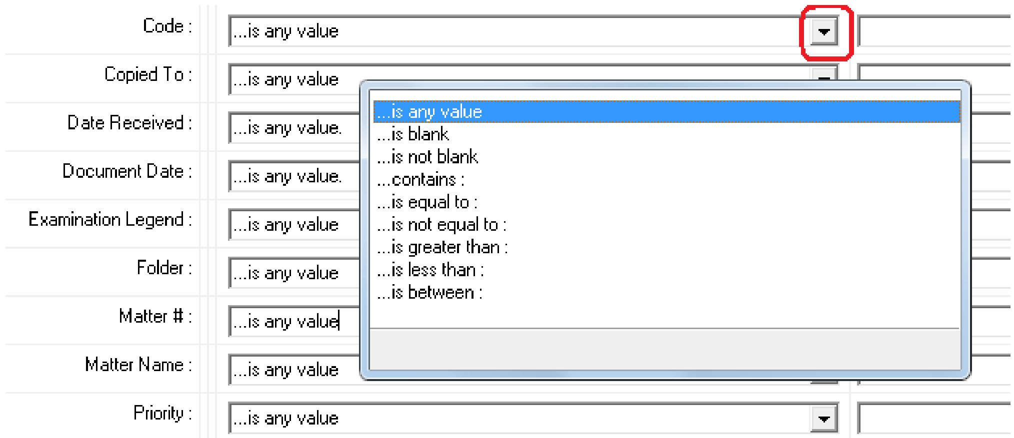
Check this:	To Do this:
Text	Find all documents containing the search term(s) anywhere within the document text.
Titles	Find the search term(s) in document titles.
Annotations	Find the search term(s) in the Annotations**.**
Profile Fields	Find the search term(s) in the document metadata (the profile fields shown at the right when you open a document):

Using the Profiles Tab (on the Search Tab)

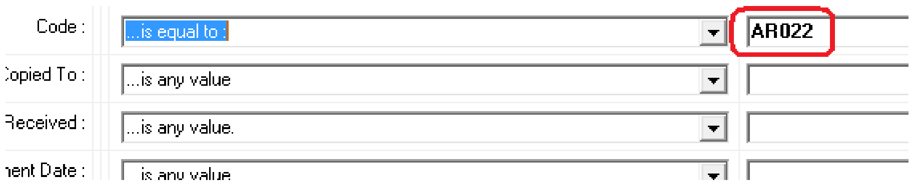
1. Select the category you are using when viewing documents (or another one entirely) by clicking on the dropdown button and selecting the appropriate category:



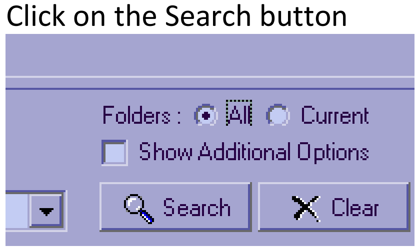
2. Click on the dropdown list beside the category field you wish to search and select the criteria.



3. Enter in the search term



4. Click on the Search button



Search Operators (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’.

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.

- If Redactions is checked, 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.

Annotations

New Annotation/Analysis Features

Primafact has improved Annotations to allow improved and more standardized organization by Issue. You can now manage Annotations in the Annotations List area of the program, accessible from the blue navigation ribbon at the bottom of the binder view. New features designed to improve issues tracking include an Issues dropdown menu that allows you to categorize by Issues set by you or your firm.

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

Annotations are designed to stay within the firm, as solicitor's work product. By default, they are not emailed and they can never be included in a Published CD. You can choose whether or not to include them when emailing or printing a document.

Revised Annotation Area

The Annotations Area to the right of the document in Normal View now includes High Importance (!) and issues fields, as well as space for additional information in Ref 1, Ref 2, and Ref 3 fields, which may be used for your designated information, such as document author, source (such as Plaintiff or Defendant) or other information coded by your firm.

Annotation Form

The Annotation form appears when you create a new annotation, or click on an existing annotation (within the document area) to edit. The Edit Annotation form includes as a drop-down Issues menu, which allows annotation coding by pre-defined issue.

Additional fields include:

> **Type**: This field allows you to categorize your annotation as **Analysis**, **Fact**, a **Highlight**, or a **Question**.
>
> **Ref 1, Ref 2** and **Ref 3**: These fields allow you to capture additional discretionary information about your annotation, such as source, applicable expert, or origin of the document – you will undoubtedly discover additional uses. Standardizing the use of each field is recommended.

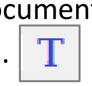
Buttons at the bottom allow you to designate your annotation as an **Annotation**, **Redaction**, or **Task**, with the corresponding functionality.

The T (Text) button allows you to insert the underlying document text directly into your Annotation.

Creating an Annotation

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.

Viewing the Contents of an Annotation

Place your mouse over the annotation you wish to view. The contents of the annotation will appear in a box below your mouse.

Browsing Annotations

Annotated documents are identified by a small yellow 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 will also display a yellow square in the thumbnail view.

Hiding Annotations

If you do not wish to see the annotations while viewing a document, click on the Annotations tab and put a check in the "Hide Annotations" box.

Deleting Annotations

If you do not wish to see the annotations while viewing a document, click on the Annotations tab and put a check in the “Hide Annotations” box.

Annotations List for Case Analysis

Annotations helps you record and manage case analysis. The Annotations List consolidates all of the annotations in a particular binder or Case.

These are filtered and sorted using the Annotations Toolbar.

To open the Annotations window, select **Analysis** from the bottom ribbon (this will replace the Binder view).

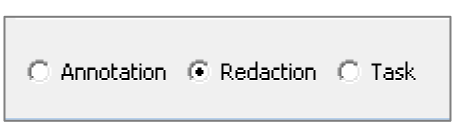
Redactions

Redactions block out sensitive material in printed copies, e-mail, and published documents which 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 (which makes them less obvious) by selecting the appropriate option when printing, e-mailing, exporting and publishing documents (the default colour is white).

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.



3. Press the "**OK**" button.

Exporting Lists

Primafact 5 improves Annotation Issues and Document Profile management by allowing you to easily export your annotation lists to Microsoft® Word or Excel®. (Excel is recommended for users who will be extensively manipulating these exported lists.)

To Copy and Export a List to Word or Excel:

1. Using the Filter Toolbar, filter your list to display the desired content.
2. Sort your documents on the desired column.
3. Add or remove columns as required, using the guidance in Selecting List Columns, above.
4. Once your desired documents are selected and sorted with the appropriate Profile Field columns, select the arrow beside the Copy List icon on the Filter toolbar:

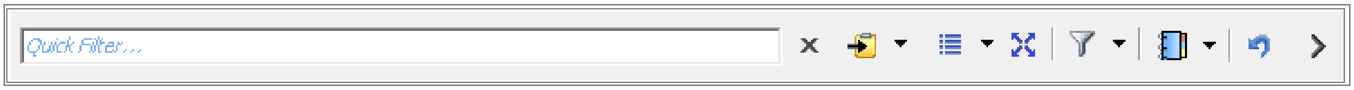
5. Select **Copy List**.
6. Paste your list into the desired application (Excel® is recommended, for maximum sorting flexibility).

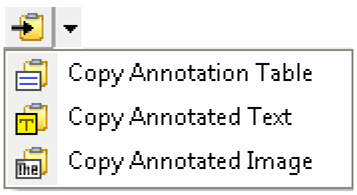
	A	B	C	D	E	F
1						
2						
3		Title	Added	Pages	DocDate	Issue
4		Attendance of July 14, 2011	04-Mar-16	2	14-Jul-11	Causation : Pre-MVA
5		Emergency Section	04-Mar-16	10	16-Jul-11	Causation : Pre-MVA
6		Emergency Section	04-Mar-16	4	04-Mar-15	Causation
7		Treatment Records	04-Mar-16	3	04-Mar-15	Muskoskeletal : Hand
8		Chrono-Surgery Section	04-Mar-16	4	06-Jun-15	Muskoskeletal : Back
9		Chrono-Surgery Section	04-Mar-16	3	07-Jun-15	Muskoskeletal : Back
10		Observation Records	04-Mar-16	2	11-Aug-15	Muskoskeletal : Back
11		Observation Records	04-Mar-16	2	18-Aug-15	Muskoskeletal : Hand
12		Attendance of August 18, 2015	04-Mar-16	2	18-Aug-18	Muskoskeletal : Back
13		Observation Records	04-Mar-16	1	12-Feb-16	Muskoskeletal : Back
14						

7. Format and edit as required.

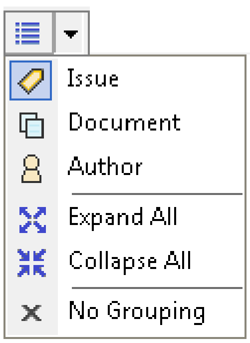
Annotations Toolbar

The Annotations toolbar features a number of tools designed for easy annotation review.

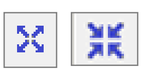




The **Copy Annotation** dropdown allows you to copy an annotation table for pasting into Word or Excel, or copy annotated text or an annotated image.



The **Grouping** icon features a dropdown that allows you to sort the displayed annotations by Issue, Document or Author. To clear the sort, select "**No Grouping**." The dropdown menu also includes icons that you can use to expand and collapse all displayed groupings.

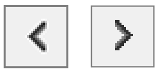


Expand All/Collapse All collapses or expands the listing of annotations beneath categories.

The **Filter** allows you to filter your displayed annotations by a number of attributes – Issue, Comment, Title, Color, Author, Annotation Type and High Importance.

The **Binder vs. Case list** dropdown allows you to view all the Annotations in the Case or for the Current Binder in the List, as determined by your selection.

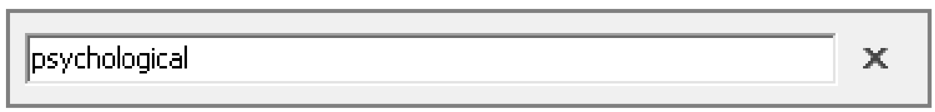
Refresh updates the list to reflect any changes made to the list or individual items on the list made since you last opened or refreshed the list. (This is a temporary feature, which will no longer be required when this Beta module is complete.)



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

Quick Filter

The Quick Filter bar at the top of the Annotations window allows you to limit the displayed Annotations to annotations that meet your selected criteria.



Expanding any of the hits will reveal the underlying annotations containing the Quick Filter Search Term, whether this appears in the Annotation Category or the main text of the Annotation.

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.

Tasks

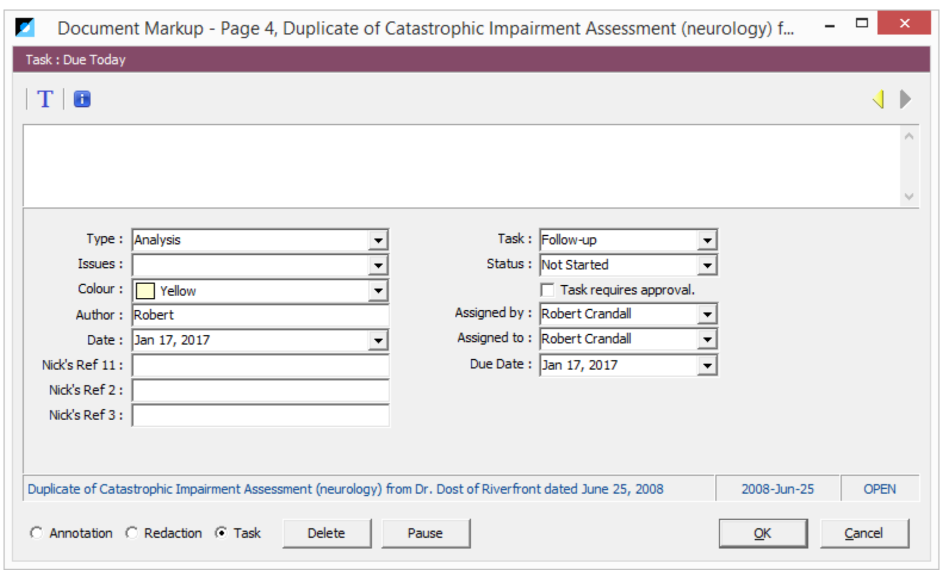
Tasks allow you to create and track tasks related to any document in Primafact. Tasks are created similarly to Annotations, with additional fields specific to Tasks.

Creating a task

1. Using your mouse and left-click button, create a rectangle on the page of a document. (Alternatively, you can open an existing Annotation and convert it to a Task by selecting the Task radio button at the bottom of the Annotation form.)

2. Click on the radio button for "Task."

3. The task-related fields become enabled and populated with default field entries (which can be edited.



4. Edit and save.

   NOTE: Tasks requiring approval can only be approved by the assignor. Tasks requiring Approval are not considered closed until both the Status is reported as "**Done**" and the Task is approved.

Task Notification

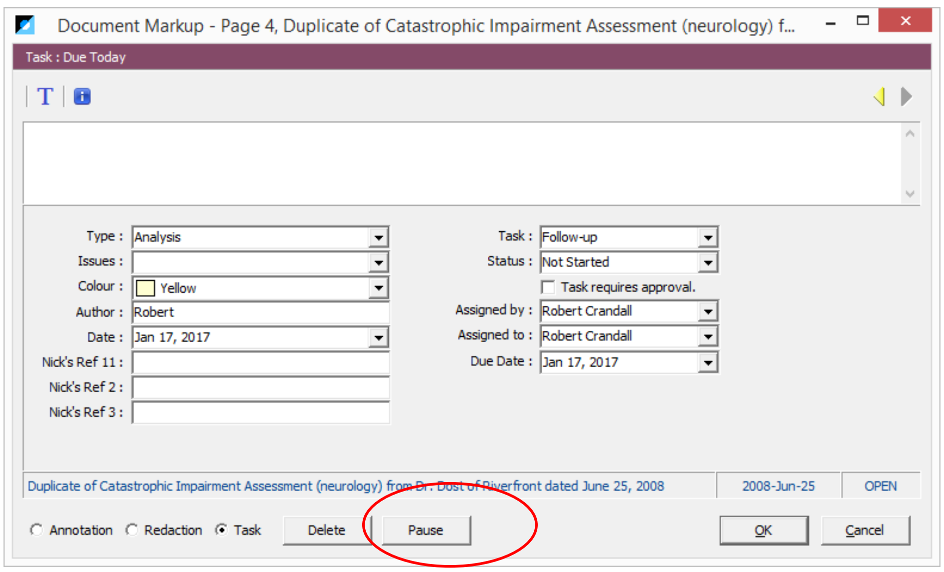
If you create or assign a task assigned to another user (Assignee) they will be notified in their Primafact Inbox. This task will also appear on their filtered task lists.

Pause a Task

The Pause item, unique to Primafact, allows you to "Pause" an item so that it disappears from your Task list view until the date that you set it to "unpause". This preserves the original due date, but allows you to focus on other tasks during the pause period.

To Pause a Task:

1. Select the **Pause** button on the bottom of the Task form.



2. Enter your "end pause" date in the **Pause Until** field:

3. Select **OK.**

4. Your task will disappear from your main view until the date you entered in the **Pause Until** field arrives. You can view your Paused tasks by choosing **Pause** from the **Quick Groupings** dropdown menu in the Tasks view (See **Viewing Task Lists – Case Tasks,** below).

Viewing Task Lists – Case Tasks

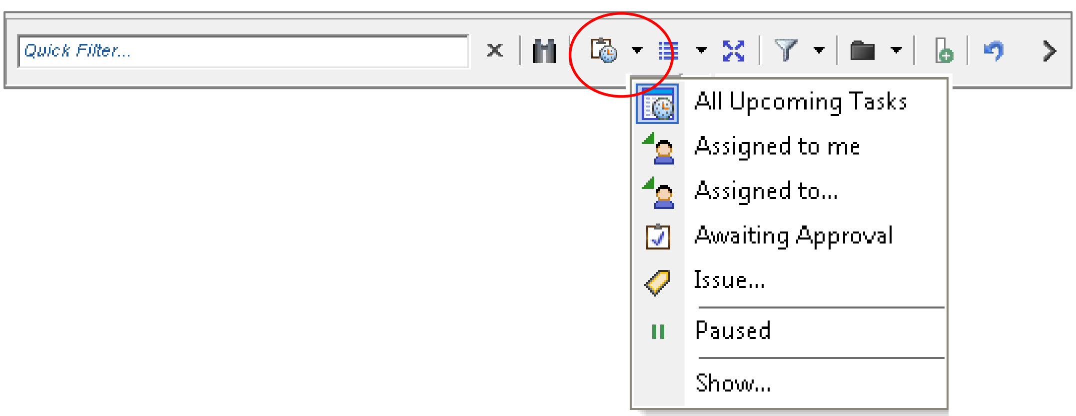
Tasks can be accessed from the **Tasks** button on the blue toolbar of any Case binder. This screen allows you to filter and view all of the tasks associated with the current case.

You can also access your own Tasks across all Cases using the **My Tasks** tab – ***See* Viewing Case Tasks – My Tasks (Global)**, below.

Quick Groupings

By Default, you view all upcoming tasks, grouped by date (Overdue, This Week, Next Week etc.)

To reset to this default view, select **All Upcoming Tasks** from the **Quick Groupings** Toolbar dropdown menu.



Other Groupings

Other Grouping selections (chosen from the Groupings dropdown)  will be applied to your current **Quick Grouping** selection (or the default, *All Upcoming Tasks,* if you did not apply a Quick Grouping), combined with your current **Show** option (Open/Closed).

Select the **All Upcoming Tasks** Quick Filter if you do not want a Quick Grouping applied to your grouped data.

Filters

Filters (chosen from the Filter dropdown)  or entered into the **Quick Filter** bar will be applied to your current **Quick Grouping** selection (or the default, *All Upcoming Tasks,* if you did not apply a Quick Filter), combined with your current **Show** option (Open/Closed).

Select the **All Upcoming Tasks** Quick Filter if you do not want a Quick Grouping included in your filter.

Viewing Paused Tasks

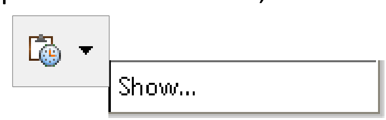
To view the tasks marked "**Paused**," select the **Paused** item from the Quick Filter dropdown menu.

You can change the pause date in the **Paused Until** field.

To Unpause, select the **Unpause** button at the bottom of the form. Your task will appear in the Tasks list, due on the date set in the Due Date field.

Show Open and/or Closed Files

By default, Primafact will display Open Files only. To view both open and closed files, or closed files, select the **Show** item on the Show Toolbar dropdown menu.



Primafact will preserve your selection as you adjust your display views and groupings until you decide to change it.

What tasks are open and which are closed?

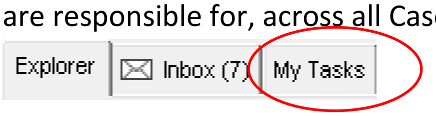
Tasks are identified as “open” or “closed” based on the content of the Status field (and the approval checkbox, if approval is required.)

	CLOSED	OPEN
Tasks *not* requiring approval (approval checkbox ***not*** selected) ☐ Task requires approval.	Tasks marked “**Done**” “ “**Approved**” or “**Abandoned**”	All other status options
Tasks requiring approval* (approval checkbox selected) ☑ Task requires approval.	Tasks marked “**Done**” or “**Abandoned**” **AND** subsequently **“Approved”**	All other status options

* ***NOTE:*** **For tasks requiring approval, <u>Approval must be completed by the *Assignor*</u>.**

Viewing Case Tasks – My Tasks (Global)

To view your own tasks (you are the Assignor or Assignee) on any Case in Primafact, select the Tasks view on the blue toolbar ribbon. This allows you to filter and view all of the tasks that you are responsible for, across all Cases in Primafact.



Reviewing Task History

To see the history of changes to any task form, select the  button.

Synchronizing a Laptop

Primafact has the ability to synchronize a case to the hard drive of a laptop, so that files can be accessed away from the office (e.g. trial, discovery, mediation, while on vacation).

Synchronizing the laptop ensures that the documents on the laptop hard drive are “in synch” with the documents in the firm’s network. Once the documents are synchronized to the laptop, they may be worked with anywhere – no internet connection needed! On return to the office, you quickly synchronize again, which ensures that changes made to the documents on the laptop (annotations etc.) are included in the main database of the network.

What You Can and Cannot Do

The “Out of Office” version of Primafact allows you to make a number of changes to your Primafact documents.

You can:	You cannot:
☑ View documents	☑ Scan new documents
☑ Search	☑ Import new documents
☑ Annotate	☑ Link documents
☑ Print	☑ Move documents
☑ E-Mail and Route	☑ Delete documents
☑ Rename	☑ Extract or delete pages
☑ Rotate pages	
☑ Modify Profiles	

How to Synchronize to your Laptop

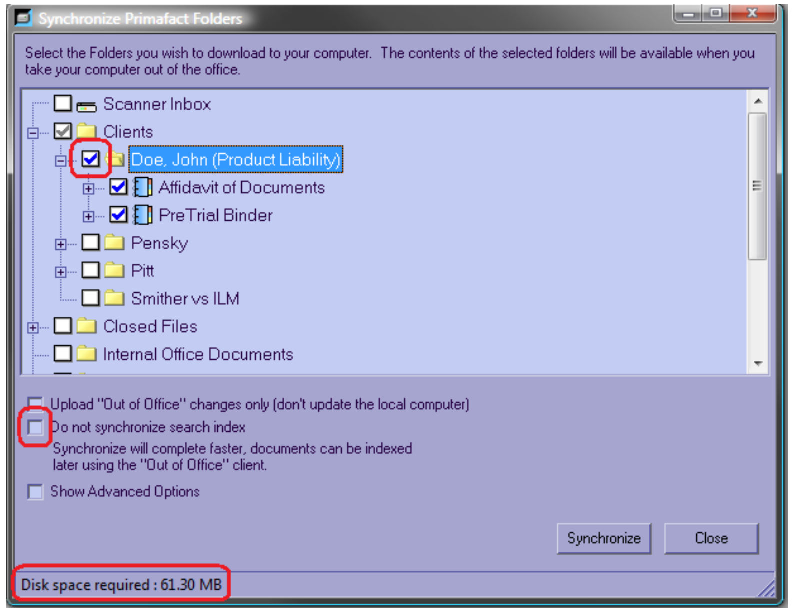
1. Select Tools > Synchronize... from the main menu. The Synchronize Primafact Folders window will appear.

2. Select the folders, binders, tabs, or sections you wish to synchronize.

   If synchronizing huge cases (over 4000 documents), it may be more practical to omit the search index. It can be rebuilt later when you are out of office.

   The status bar shows approximately how much disk space is needed on the laptop.

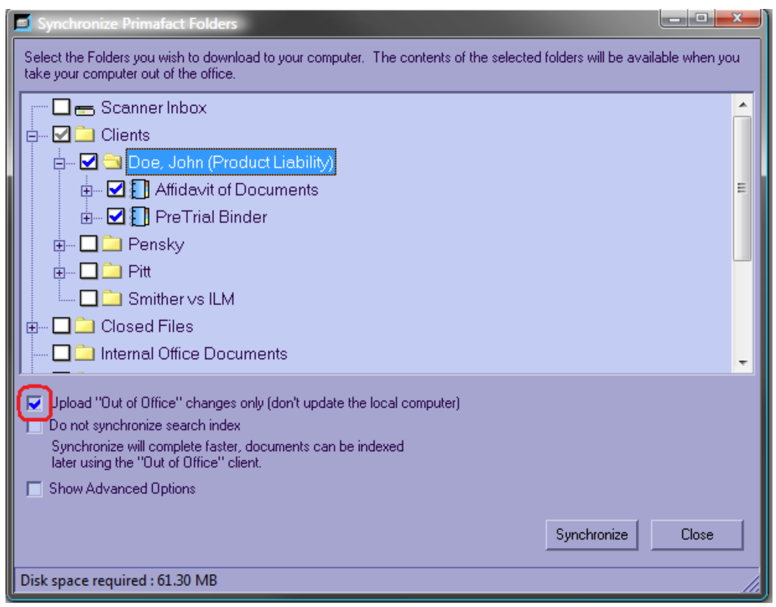
3. Click the Synchronize button to start the process.



Synchronizing Back to the Server

To synchronize the Out of Office changes back to the server when you are back in the office, choose Tools > Synchronize, then ensure that Upload "Out of Office" changes only is checked.

Click the Synchronize button.



Search Index

You can save time initially synchronizing to your laptop by selecting **Do not synchronize search index** at the time you perform the initial synchronization. You create the search index later in the Out of Office version by selecting **Tools > Index New Documents**. (The synching is still time-consuming, but can be deferred to a more convenient time.)

Part 6: Customizing Primafact

Annotation Issues

This feature allows you categorize annotations by issue, and to set up standard categories for repeated use.

Setting up an Annotation Issue

1. Select the Gear icon from the far right of the blue bottom navigation ribbon.
2. Select **Manage Case Issues**
3. The Annotations Issues window will open.
4. Select Add New Annotation Issue….
5. Fill in the Category and Description Fields.

Deleting an Annotation issue

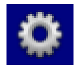
1. Right-Click on the desired issue on the Annotations Issue form.
2. Select **Delete** from the drop-down menu.

Customizing Annotation Forms

Primafact 5's Updated Annotation Forms include three new annotation fields **(Ref 1, Ref 2** and **Ref 3**), which allows greater flexibility in coding annotations.

Now teams can customize the names of each Ref Label by Case, for more systematic coding and easier content identification (the chosen Label will appear in Annotation Lists and Forms on that specific Case for all users).

Customizing Ref Labels

1. To customize Ref Labels for a case, select the Gear icon from the far right of the blue bottom navigation ribbon. 
2. Select **Annotaion Labels**
3. The Case Profile Field Labels window will open.
4. Select **Add New Annotation Issue**.
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.

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

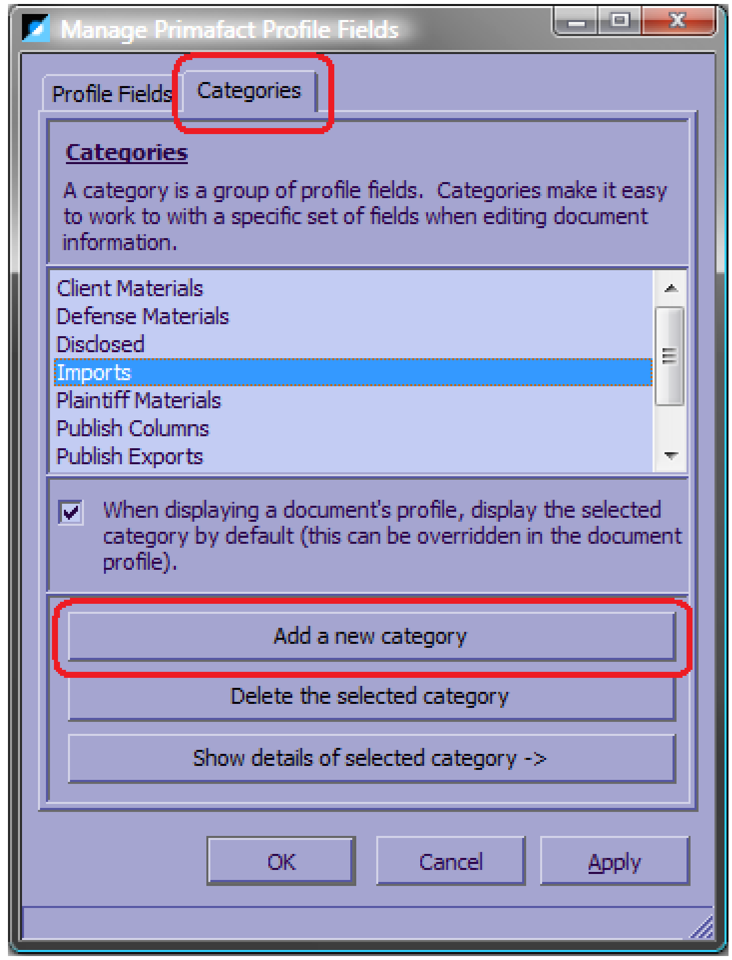
The user interface for setting up profile fields and categories is called the Profile Management Window. To access it, select **Tools → Setup → Profile Fields** from the main menu.

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

Creating a Category

1. Select the Categories tab.

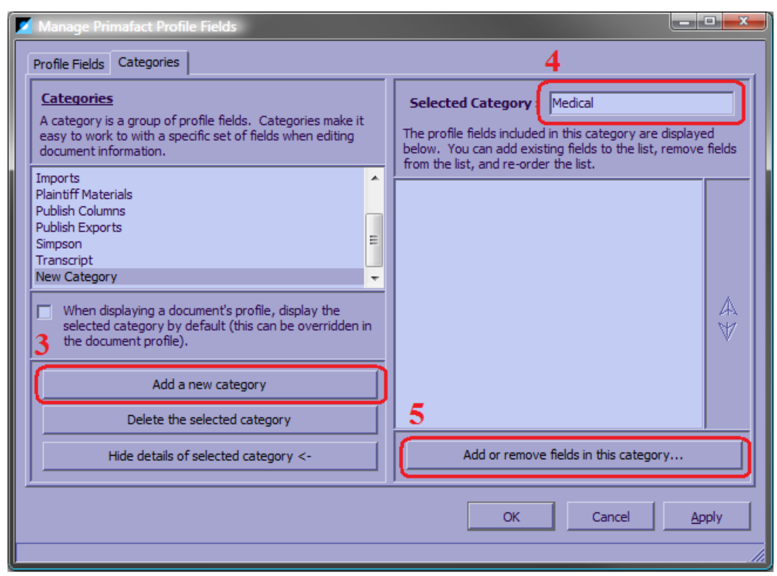
2. Click on "Add a new category".
   You will now see the full window (see step 3).



3. Click on "Add a new category" in this window.

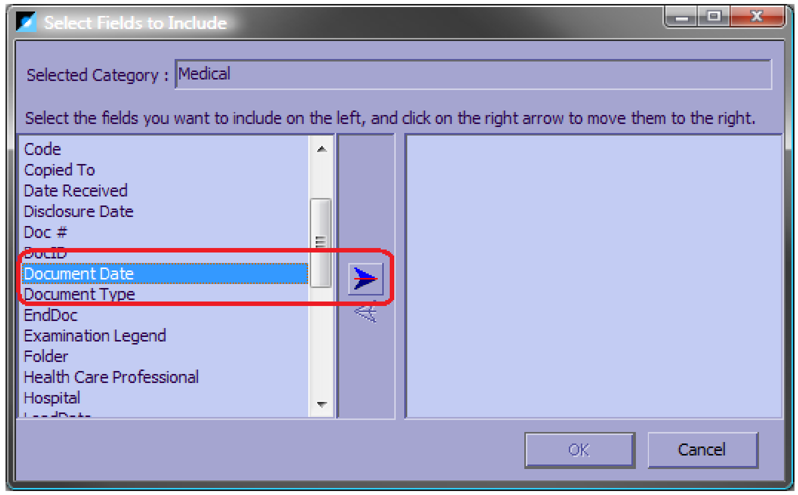
4. Enter a descriptive name for "Selected Category" in the top right, for example "Medical".

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.

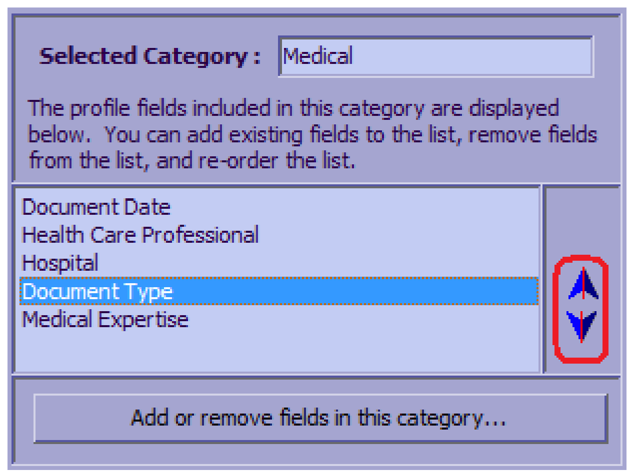


8. Click **OK** when done.

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.



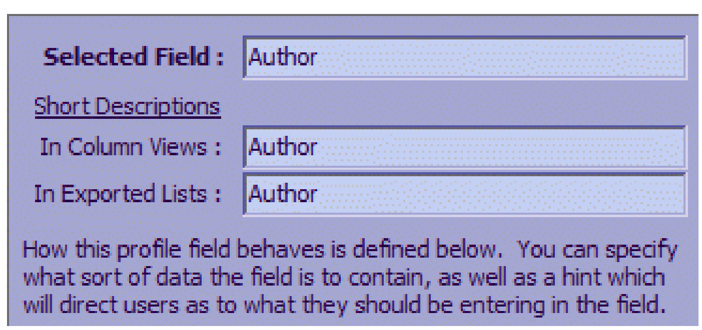
Creating a New Field

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.

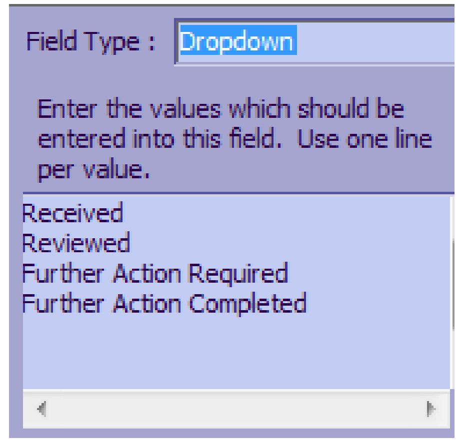
- **In Column Views** - this description is used when the profile field is displayed in the list view on the Explorer tab

- **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 of v you specify.

   Number Accepts numbers only (no decimals).

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

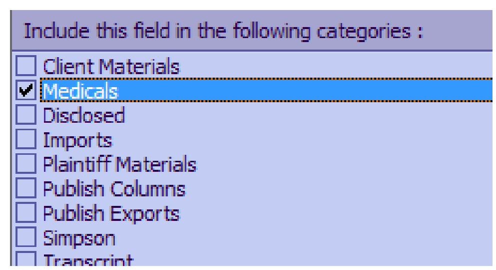
   Time Accept time input only. Appears with a drop-dow time button.

   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.

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

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.

Search Templates

Searching in Primafact is now easier and more efficient with features that allow you to save your searches. Search Templates allow you to set up search parameters that you can save for reuse in future searches. You may create search templates for any available searches in Primafact.

Search Templates allow users to save search terms for reuse so they can be more quickly executed in the future. The primary benefits are:

- ✓ Saving time by setting up quick search shortcuts designed for repeated use
- ✓ Improving consistency for standard searches that are repeated within and across cases such as reviews that happen at case milestones (settlement conferences and EDs).

Creating a Search Template

1. To create a search template you first need to perform a search in the Search window.
2. Once you have performed your search, click the drop-down arrow to the right of the search button.

3. Select **Save Search Template As.**
4. Select your desired saved search folder. This can be at the Personal level (My Search Templates) or at the Case level, if you are working within a Case.
5. Name your Search Template. By default, the name will be your search query, or you can select another name for the saved search template.
6. Click **Save**.
7. Your new Search Template is now available for use. If you wish, you may organize your Templates using the **Manage Search Templates** instructions in this Chapter.

Re-Executing Search using a Search Template

Using existing Search Templates can enhance the speed and consistency of your searches. You may choose from your Personal Templates or Case Templates.

Using Search Templates

1. In the search window, click the drop-down arrow to the right of the **Search** button and select **My Search Templates**.
2. A menu displaying your available Search Templates will appear. Applicable nested menus with deeper group structures are available by clicking on the triangle to the right.
3. The search will be performed immediately on selection of the Search Template.

Personal vs. Case Templates

Search Templates have different scopes:

- ✓ **Personal** – Personal templates are created just for a specific user. Personal templates are available to that user any time, across cases.

- ✓ **Case** – Case templates are saved to a specific case and are available to any users, but only for searches within the case.

Managing Search Templates

If you have set up a number of Search Templates, you may organize them into folders.

Personal and Case Search Templates can be renamed to make them easier for you to identify.

To Manage Search Templates

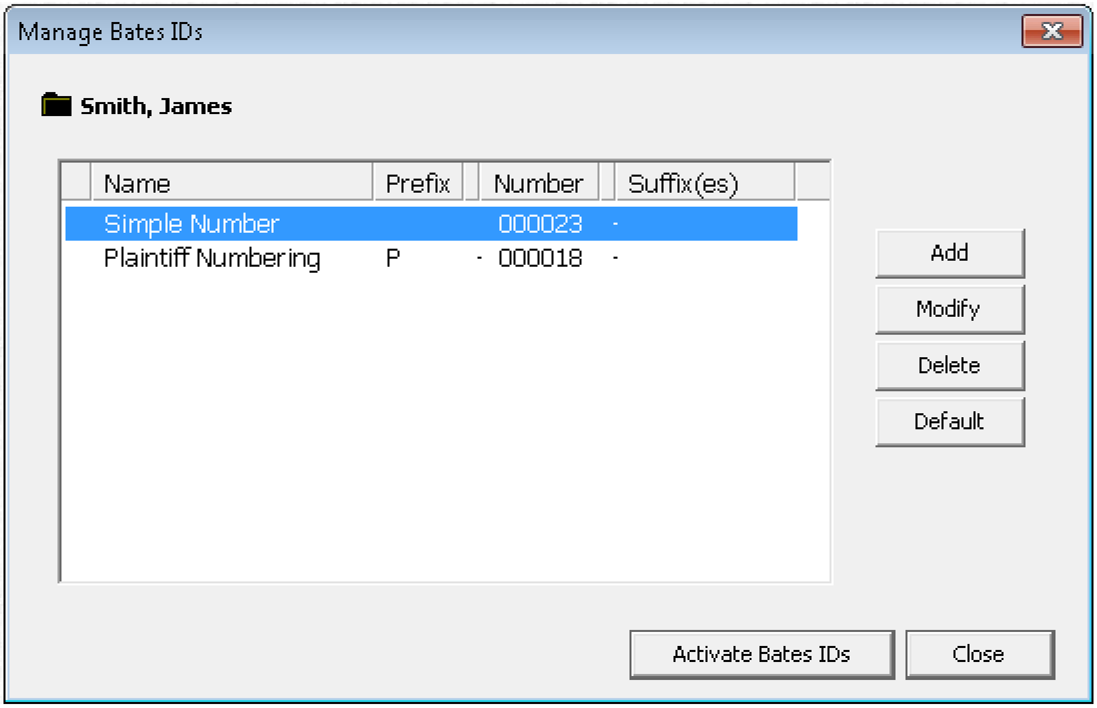
4. In the search window, click the drop-down arrow to the right of the search button and select **Manage Search Templates.**

Setting Up Bates IDs

Setting up the Bates ID Master List

You may access the Bates Master List using the Gear icon at the bottom-right of the Blue Binder ribbon: 

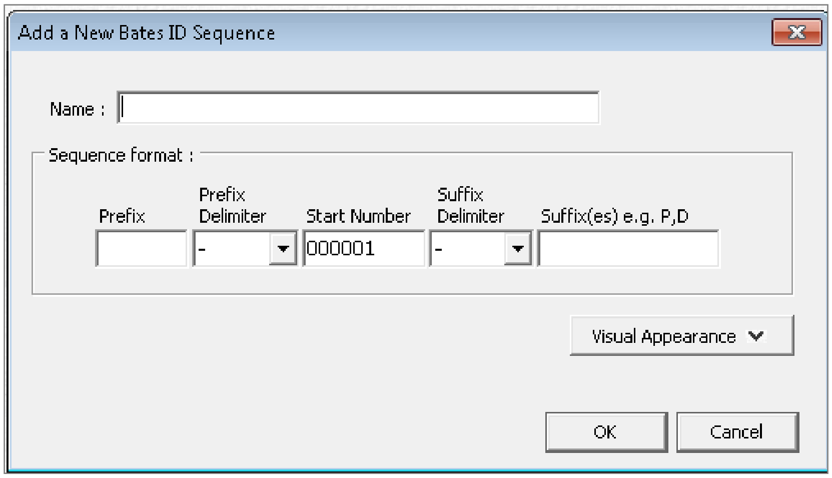
1. Click on the Gear icon and select **Manage Bates IDs** from the pop-up menu.
2. The **Manage Bates IDs** window will appear:



You may 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.

Part 7: 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 (if you have Primafact **Team version**, you don't have security, and everyone can access the Trash).

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.)

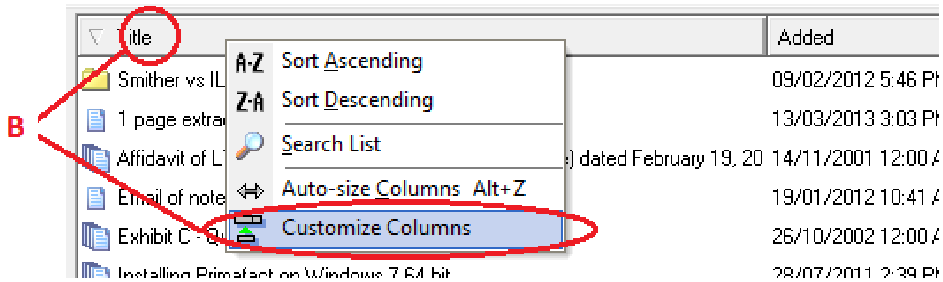
There may be instances when documents are accidentally deleted from their folder or binder. In order to prevent someone from deleting them from the trash or emptying the trash altogether, it is best to restrict all Primafact users' access to this folder (Read Only) and leave the management of this folder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

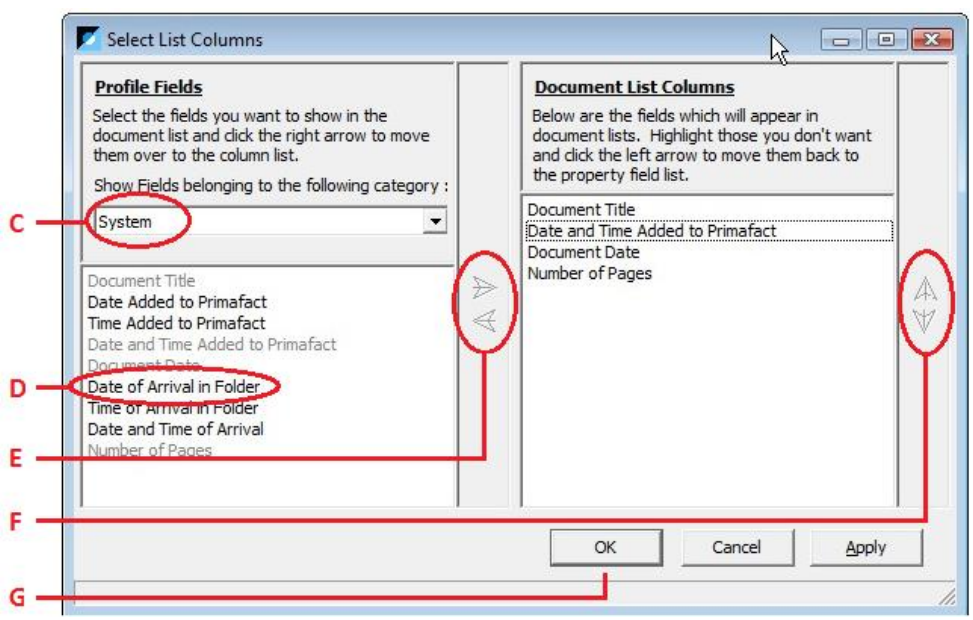
Purging files from the Trash folder

1. First set the Date Arrived in Folder on the Trash. Click on the TRASH icon in the explorer window.

2. 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”.



4. Now in the list under “System”, select “**Date and Time of Arrival in Folder**”.

5. Click on the arrow pointing to the right to add this to the “Document List Columns” section.

6. Click on the UP or DOWN arrow on the far right to position the column now, if you like.

7. Click **OK**

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. Having documents over 1,500 pages can cause 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

Need to force OCR

Prioritize Indexing

Filing Screen