



## Primafact New User Quick Start Guide

### Creating a Case

#### Create a New Case

1. Locate desired Template
2. Right-Click on selected template → select Duplicate
3. Right-Click destination folder (Where Client Files are located) → select Paste
4. Rename Case Folder\*
5. If Template folder is not black, right-click on Case folder → select Convert to Case

*\*Consult your Firm's Primafact Manager for Case naming standards*

#### Add Binders/Tabs/Sections to your Case

##### Add a Binder to a Case Folder

1. **Right-Click** on the Case folder → Select **New** → Select **Binder**
2. Rename Binder

##### Add a Tab to a Binder

1. In the Binder View
2. **Right-Click** anywhere within the Binder → Select **New** → Select **Tab**
3. **Rename** Tab
4. **Position** Tab as desired

##### Add a Section to a Tab

1. In the Binder View
2. **Right-Click** on the Tab where your Section will be located → Select **New** → Select **Section**
3. Name & position Section as desired

*Tabs and Sections can be moved as needed within the Binder by dragging the Tab and Section to the appropriate location*

### Importing Documents

#### Supported File Types

- Word
- JPG
- PDF
- TIF
- MSG (Outlook message)
- BMP

#### Scan Settings

- 300 DPI – recommended setting for scanning documents
- Black and White Monochrome

*Colour should only be used for documents that need to be in colour - i.e. Photographs*

## Importing Documents (Continued)

### Drag and Drop from Outlook

Outlook emails can be moved from Outlook to Primafact by dragging the email and/or supported attachment directly into any Primafact Binder.

Primafact Outlook Plug-In allows you more control over email handling.

- Use the **Include** selector to import Email + Attachment; Email Only; Attachment Only.
- Use the **Send As** selector allows import Email + Attachment(s) as a single Primafact document or Multiple documents

*Primafact auto-names Emails: The document title in Primafact includes the sender, recipient, email date and subject line.*

### Drag and Drop from Windows/Network

Import Documents by dragging the document directly into any Primafact Binder.

*The document title in Primafact will keep the same name. You can rename the document in the **Document Title** area, at the top of the Document Preview area.*

### Print to Primafact

Documents can be printed directly into Primafact from Word, WordPerfect, Outlook, Adobe or any page on the Internet.

1. Open a document and select **Print**
2. Select **Primafact** from the list of available printers
3. In Primafact the **Print to Primafact** window will open. Select the document and click **OK**
4. Rename as desired.

## Working with Documents

### Moving Documents

Documents can be moved within Primafact by dragging them to any desired position within any Binder/Tab/Section in Primafact\*

*\*If the Auto-sort feature is turned on, you cannot reposition documents outside of the Sort parameters*

### Copying Documents

Copying a document creates a shortcut/link that allows you you to access the same document from multiple locations within Primafact.\*

1. **Right-Click** on the document → Select **Copy**
2. Locate the Binder/Tab/Section and **Right-Click** on the target location, select **Paste** and position as desired within the Binder.

*\*Documents can be copied to any location in Primafact except to a location in another Case folder.*

## Working with Documents (Continued)

### Delete Document

Documents can be deleted by right-clicking on the document and selecting **Delete**.

*Primafact will provide a warning message if the selected document is the only copy in the active database. Documents with copies elsewhere in Primafact (other than Trash) are deleted without the warning message.*

### Undo

To undo a document moved to the wrong location select **Edit → Undo** from the top toolbar menu. (**Ctrl + Z** works too).

The Undo window will open. Select the desired item to undo.

**!** *Undo only applies to entire documents moved or reordered within Primafact – changes to the pages reordered or deleted within documents cannot be remedied with the Undo feature.*

*Undo will only work for documents that have not been relocated since the action you wish to Undo.*

### Duplicating Documents

Duplicating a documents creates a clone of the original document. This new document is not connected to the original. Duplicates are managed independently of originals - any changes made to a document will not be reflected on its duplicate.

1. **Right-Click** on the document → Select **Duplicate**
2. Locate the Binder/Tab/Section and **Right-Click** on the target location, select **Paste**
3. Position as desired within the Binder.

*The duplicated document's title will indicate that it is a duplicate. The document can be renamed as needed.*

### Merging Documents

Merging documents combines multiple documents together into a single document.

1. **Left-Click** on the document that will comprise the "Lead Document" (Title & first pages of the combined document)
2. **Press and hold** the **CTRL** key and select the document(s) to include in the Merge
3. **Right-Click** → Select **Merge**

*Documents should kept to a maximum size of 1,500 pages. Longer documents should be split into multiple documents.*

## Working with Documents (Continued)

### Extracting Documents

Extracting documents is the opposite of merging. Extracting allows you create new documents by moving or copying pages from one document into a new document.

1. Open the document you wish to extract from and select the **Thumbnail** view
2. **Right-Click** and select **Extract Pages**
3. Select the pages you wish to extract and select the destination where the extracted page(s) will be placed.
4. Select **Move** or **Copy\***

\* **!** **Move** will remove the selected pages from the original into a new document.

\* **!** **Copy** will copy the selected pages in a new document. (The pages are cloned). The original document will remain intact.

### Trash Folder

Deleted documents can be retrieved from the Trash folder in the folder window.



To retrieve a deleted document, select that item from the **Undo** window (if permitted) or drag from Trash into a Binder/Tab/Section.

**Move:** Moves the document, removing the original from the Trash Can

**Copy:** Moves the document, but the a link (copy) stays in the Trash

**Duplicate:** Creates a clone of the document, the original remains in the Trash Can

Users can sort documents in the Trash folder by Date Added, Doc Date and users can add additional columns as needed\*

1. **Right-Click** on the Title Bar and select **Customize Columns**
2. Select the **Profile Fields** as needed and click the **Blue Arrow** to add the field to the Document Columns List

\*Profile Fields are used to code documents. The **Document Date** field is an example of a Profile field.

## Binder Views

### Binder View

Use the Binder view to see Tabs/Sections/Documents within the Binder, and position contents in the desired location.

When a binder is selected, you'll notice a **Blue Navigation Ribbon** at the bottom of the window. When the "**Binder**" is highlighted in yellow, you are in the **Binder View**.

### Document Preview

The **Document Preview** displays documents alongside the binder view. Click on any document in a binder to see it displayed document in the preview pane

The **Chevron** button **> <** will reveal and hide the **Preview** pane.

## Binder Views (Continued)

### Document List View

Users can access the **Documents List View** by selecting the Documents option on the **Blue Navigation Ribbon**.

This view allows documents to be dynamically presented in groupings selected by the user (and different from how documents are organized in the binders). Documents can be selected by filtering, grouping, and ordering (sorting) documents by selected Profile fields chosen by the user.

Documents can be displayed by Binder or by the entire Case.

This is a great screen for searching, since documents matching search criteria are displayed in the preview area alongside the document list.

## Document Views

### Thumbnail View

**Thumbnail** view allows users to see all pages in a document. This feature is useful for re-ordering pages, extracting pages, deleting pages, and changing the page orientation.

To re-order pages, click on the page and drag it to the appropriate location.

To **Rotate**, **Extract**, or **Delete** pages, **Right-Click** on the page and select the feature. Users can use these features to adjust multiple pages. To select multiple pages, hold down the **CTRL** key to select the desired pages.

### Normal View: Text window

The **Text** window displays the page's converted searchable text. This can be useful to copy and paste text, for example, into a word document or an annotation.

*Indexing will not convert handwritten text*

### Normal View: Browse Window

The **Browse** window will show users where a document is located within a Binder.

Users can cycle through documents in a binder by clicking on the corresponding document in the Browse area. Clicking **Show Binder** takes you directly to the document location in the Binder view.

### Opening a Document in a Tab

**Double-Click** on a document to open it in its own **Tab**. The tab will be highlighted in blue when viewing that document.

A document can be opened in its own window by clicking on the **Detachable Document Window** button.

## Exporting Documents


### Copy Index

The Binder Index feature allows users to create an Index of Documents that can be used in Word documents.

1. Select the corresponding Binder, Tab or Section and **Right-Click** anywhere within the Binder (or on Tab or Section) and select **Productions → Copy Index**
2. Open a new Word document and **Paste** the Index
3. Edit the list as required

### Primafact Publish

Primafact's **Publish** feature is used to exchange document packaged within a shareable Primafact viewer. Recipients do not need to install any software. This feature is supported for PC users (not available for Mac).

1. Right-click the Binder, Tab or Section you wish to Publish
2. Select **Productions → Publish to CD** – the **Publish Primafact Folders** window will appear
3. Optional: select additional Binders, Tabs, Sections or documents you wish to publish
4. If not publishing directly to CD, Select **Publish to: Specific Folder** and click on the  icon beside **Target Folder**.
5. Browse to publish location
6. Select **New Folder** – name the folder as desired.
7. Adjust the Export Options as desired and click **Publish**.
8. Save published folder to shareable media.
9. (If using a secure link, first compress the Published folder.)

### Save Binder as PDF

Saving Binders to PDF format allows users to share an organized document set in a tabbed multi-document PDF. (Useful when sharing Primafact document sets with Mac users.)

#### To share a full binder:

1. Right-click within click within the Binder and select **Productions → Save Binder as PDF**
2. Select published PDF destination in **Folder** area
3. Adjust Output Options and PDF Options as desired
4. In the **Format** area, select **Single PDF File**

#### To share a Tab or Section or select documents:

1. Select desired documents, Tab(s) or Section(s)
2. Right-click and select **Save As**
3. Select published PDF destination in **Folder** area
4. Adjust Output Options and PDF Options as desired
5. In the **Format** area, select **Single PDF File**

*Users can adjust the export options by clicking on the **PDF Options** tab in the PDF save window.*

## Exporting Documents (Continued)

### Email Documents

Users can email documents from Primafact in PDF or TIF format.

1. Select the documents
2. **Right-Click** on the document(s) and select **Email**
3. Adjust the settings as needed and select **Ok**
4. Prepare and send the message as usual

*Users can drag and drop documents from Primafact into an Outlook message. Note the ability to send a Primafact document using via email will be constrained by size limits set by system administrators.*

### Routing Documents

If the recipient is a member of your firm with access to Primafact, we recommend routing the document, which adds a link to the Primafact document in an email message. Clicking the link will take the recipient directly to the document location in Primafact.

1. Select the document(s)
2. **Right-Click** on the documents and select **Route**
3. Prepare and send the message as usual

- *Users can drag and drop Primafact Links from Primafact into an Outlook message.*
- *Routing from within an open document also provides the option of linking to a specific page.*

## Additional Resources

Primafact's User Manual can be found online at:

[http://help.primafact.com/OtherDocs/Linked\\_PDF\\_Files/Working\\_With\\_Primafact\\_5.pdf](http://help.primafact.com/OtherDocs/Linked_PDF_Files/Working_With_Primafact_5.pdf)