Primafact 6
Planning Guide
Annotation Coding and Chronologies
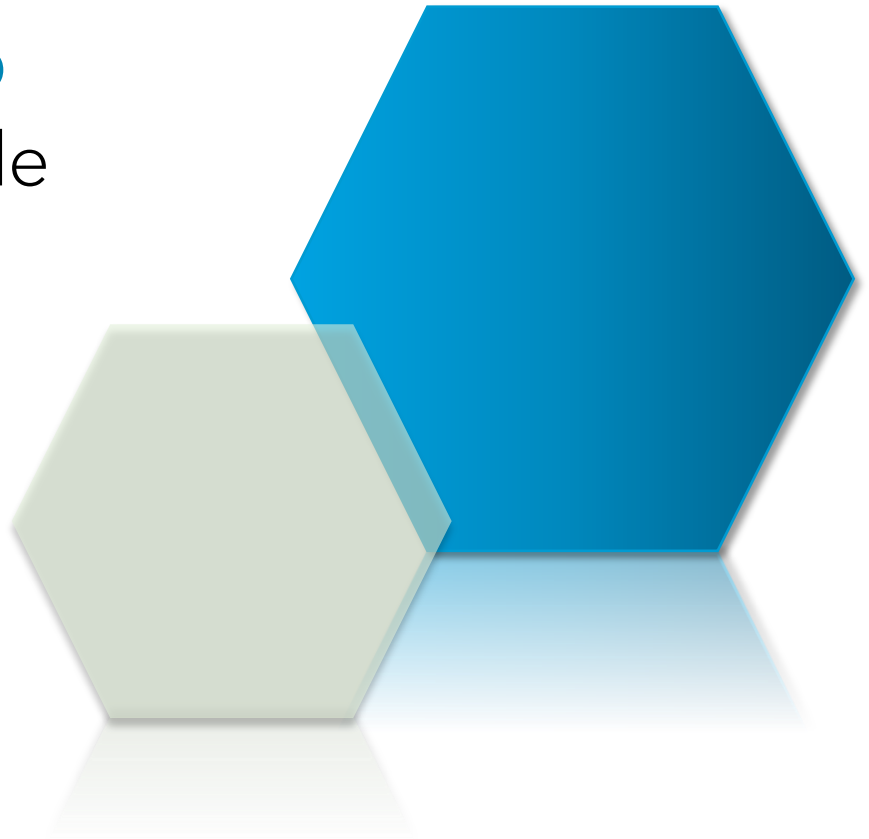
Overall Program Configuration

To support consistent coding across cases consider configuration updates including:

- Converting Case Templates to the new Case Template Format
- Setting Global Annotation Color Values and Labels

Annotation & Review Configuration

The Annotation Enhancements in Primafact 6 are designed to support more effective review and Case preparation, including the development of reports and Case Chronologies. Your selected customizations should *"begin with the end in mind,"* so that coding decisions are aligned with your review goals.

Step One: Decide on Reports

The Annotation enhancements are designed to enable reports to be instantly produced, based on annotation coding. To determine coding configuration, please determine 1-2 reports you would like to create and what they should look like.

Report Examples:

i) <u>Chronologies – Pre-Accident Health</u>

   Fields included:

   Event Date | 👍👎 | Annotation Color Code | Document Title | Page Ref | Note | Text Excerpt

ii) <u>Discovery Preparation</u>

   Fields included:

   Annotation Color Code/Issue | 👍👎 | Document Title | Page Ref | Note/Question | Text Excerpt

Step Two: Determine Coding

Annotation Coding will be established based on what information you would like to include in your Reports.

1. **Color Coding**.
   Color coding makes evidence classification highly visible "at a glance" when reviewing binder views and documents. (Color coding assignment will be considered along with setting Global Annotation Color Values and Case Templates. We recommend reserving some of the colours for future assignment.)

   <u>Colour Coding Examples:</u>
   - Pre-Accident Health
   - Post-Accident Health

- Diagnosis
- Pre-Accident Income
- Post-Accident Income
- Liability
- Key Issue
- Inconsistency

2. **Annotation Issues**

   Annotation Issues are typically more granular than color assignment. They may be used to "cross-cut" (e.g. Pre-Accident Health + Inconsistency), or code with more specificity. You may decide to start with color coding then add Annotation Issues if finer issue delineation is desired.

   <u>Annotation Issue Examples:</u>
   - Pre-Accident Health:
     - Resolved pre-accident
     - Aggravated by accident
     - Ongoing
   - Post-Accident Health
     - Specific injuries/complaints
     - Diagnosis
     - Treatment Recommendation
   - Liability
     - Party A
     - Contributory (Plaintiff)
   - Challenges
     - Inconsistency
     - Discuss with Witness

Step Three: Determine Annotation Templates

Annotation Templates make consistent annotation coding more efficient. At a minimum you will want to set the firm default annotation template. Users can set their own defaults if desired.

Annotation Default

- Color
- Color Label
- Text Excerpt auto-populated (Y/N)?
- Event Date Field auto-populated (Y/N)?

Other Annotation Templates

For frequently-used coding, consider adding templates to standardize coding for things like:

- Pre-Acc Health Chronology Entry
  - Helpful 👍
  - Adverse 👎

Step Four: Determine Annotation List Views

Annotation List Views make it easy to review consolidated Annotation content configured in the order you wish to view the information. 2-3 Views are recommended as a "start" to enable reports and case prep. Sample views include pre-accident health chronology, discovery prep, income chronologies, and adversarial positions.

Consider:

- Fields you want to view
- Field formatting (colour, size)
- Field positioning on lists (1,2,3)
- Sort Order, Filters and Groupings

Step Five: Case Selection

To make feature evaluation most effective and useful for participants, we recommend that each team selects a small number (2-3) Cases to work on intensively to build up a meaningful set of annotations to build Reports and chronologies before implementing broader system-wide coding updates.

Step Six: Division of Effort

Consider if any coding activities can be delegated (*e.g. Lawyer/Clerk identifies document content to annotate; assistant adds/confirms dates, cleans up text excerpts*).

Step Seven: Configuration and Training

We offer planning, configuration and training packages to help your team make the most of the Primafact 6 program enhancements.