Introduction

Welcome to Visionary

Your Visionary software provides you with the very best tool for retrieving, reviewing, organizing, and presenting all forms of discovery data. Visionary's integrated work environment and IssueBuilder outlining tool streamlines the effort needed for attorneys, paralegals and trial technology experts to collaborate and reduce the amount of duplicative tasks performed when using alternative technology solutions.

If you are new to Visionary, we recommend that you review the Learning Visionary topic below. This will provide you with tips on how to get started using the software. In addition, our on-line help is always available by pressing the 'F1' key from anywhere in the program. Of course, both on-line and telephone support are also available.

Thank you for selecting Visionary. You can count on us to continue to evolve our products to be the best and easiest to use in the industry.

Learning Visionary

It’s common for new users to simply jump in and begin using Visionary without ever reviewing a manual. Depending on your general computer software experience and what features are relevant, you may be able to start using Visionary with minimal time spent in formal training or perusing manuals. However, a more systematic approach to training usually results in a better user experience and also causes users to fully understand the capabilities of Visionary and its many time-saving features. Below is a list of training resources.

Quick Start Guides

Visionary has created three ‘Getting Started’ guides to get case administrators, attorneys, paralegals and trial presenters up to speed quickly. These guides are designed to bring new users up to speed on how to use the most common tasks relevant to their job. These short manuals won’t make you an expert in every aspect of the program, but they will give the basics needed to start using the program in short order.

On-line manuals

PDF Versions

On-Line Demonstrations

Visionary provides on-line demonstrations of its software several times each week. If you have a high speed Internet connection, you can join in on these demonstrations to learn the basic functionality of Visionary and get your questions answered. Contact Visionary for more details.   (See Contacting Visionary Legal Technologies)

Visionary Training Seminars

Visionary routinely provides hands-on training seminars. For more information on times and locations, or to schedule training at your firm, contact Visionary. (See Contacting Visionary Legal Technologies)

Visionary Web Site

Additional training information may be available at the training page on Visionary's web site, www.VisionaryLegal.com.

Visionary 8.0 Frequently Asked Questions

Q. What's are the limitations of Visionary 8.0 Free?

A. Visionary 8.0 Free is intended for small cases limited to 5 or less depositions/transcripts and 200 or less documents. Some features are not available in the free version, as well, such as:

•Automatic Bates Numbering

•Automatic OCR

•On-The-Fly Scanning

•Quick Sync

•Export to HTML

•LiveFeed Direct

•Custom Reports

•Import/Convert PDF Files

Q. Do I get Support if I use Visionary 8.0 Free?

A. Visionary 8.0 Free users get help with installation and registration. Additional support can be purchased. Please contact a Sales Representative for details and prices.

Q. What's the difference between product support and training?

A. Support is generally provided through email and is geared towards answering your questions regarding improperly working software functions (i.e. error messages). Training involves systematically teaching people how to use the program. The value of training is that it can reveal capabilities of the program that you may never otherwise appreciate. We routinely speak with 'self-taught' users who have successfully used the program for years, who suggest a certain functionality that's been there all along, but they didn't know it. In other cases, these same people are not aware of alternative and faster ways of accomplishing something. Visionary offers several options fro training. Contact a Sales Representative to learn more.

Q. I'm considering using this software on a multi-million dollar case, can I trust your software for such an important task?

A. Absolutely! Visionary has been used in trials for more than 15 years and is routinely used in complex, multimillion-dollar cases. In fact, many believe that Visionary's capabilities shine the most, over the competition, in complex matters involving lots of data because of Visionary's strong transcript management and database integration.

Q. Do I have to go directly to Visionary for production services?

A. No. There are many companies throughout the United States that can provide production services that are compatible with Visionary.

Q. How do I synchronize my videos for use in Visionary?

A. With Visionary 8.0 Pro, you have several options for synchronizing.

1. Quick Sync: Sync your deposition at your desk.

2. Quick Sync Upload: Send your video and transcript to Visionary to Sync, QC and send you back the syncronized VDF transcript.

3. Contact a local Visionary Service Provider.

Contacting Visionary Legal Technologies

Corporate Office:

Visionary Legal Technologies

1555 Valwood Pkwy, Suite 110

Dallas, TX 75006-8400

Telephone: (214) 370-4359

E-Mail: Info@VisionaryLegal.com

Home Page: http://www.VisionaryLegal.com

Contact Support

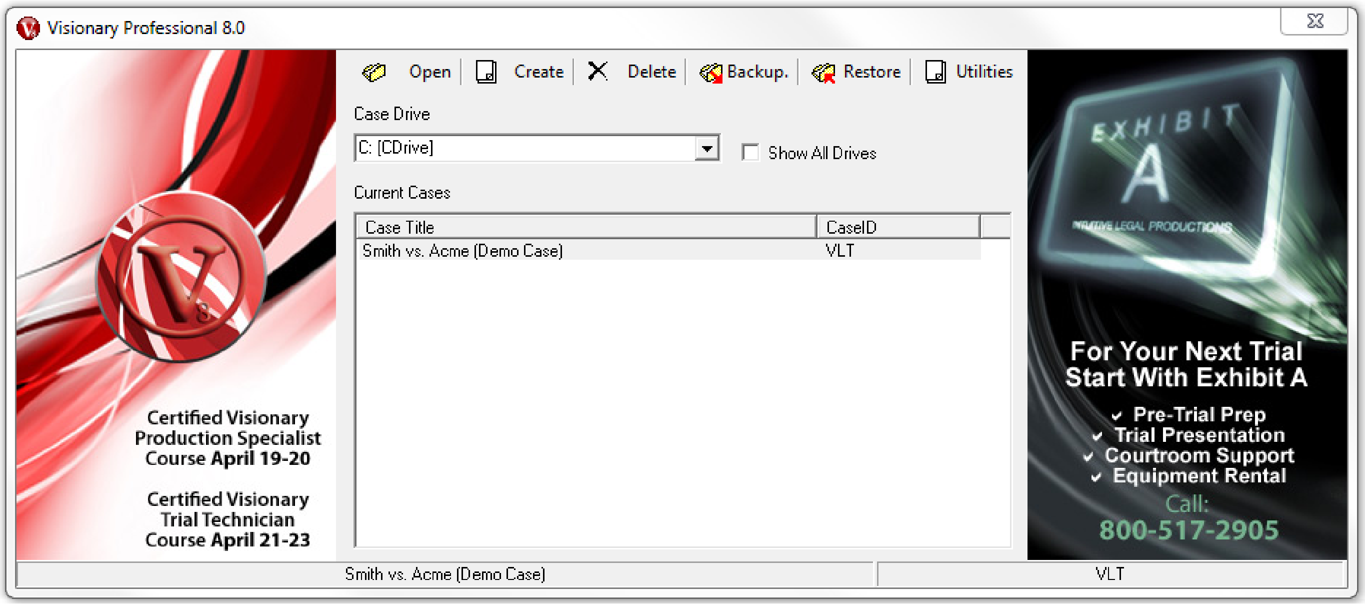
Visionary Legal Technologies provides support for Visionary via email and the Online Support Request Form.

Email support: Support@VisionaryLegal.com

Online Support Request Form: www.VisionaryLegal.com/Support.aspx.

Select Case

The case selection dialog is displayed when Visionary first launches and when a user selects the '\File\Open Case' menu item from the Main Window.



Case Drive - Displays all the connected drives that have a Visionary database.

Show All Drives – Checking this option will display all the connected drives as opposed to just those drives that contain a valid Visionary database. Selecting a drive that does not have a Visionary database on it will cause the program to create a Visionary database.

Open – Opens the currently selected case.

Create – Launches the Case Setup Wizard.

Delete – Deletes the selected case.

Backup – Launches a dialog for backing-up cases. See Backing-up Cases topic.

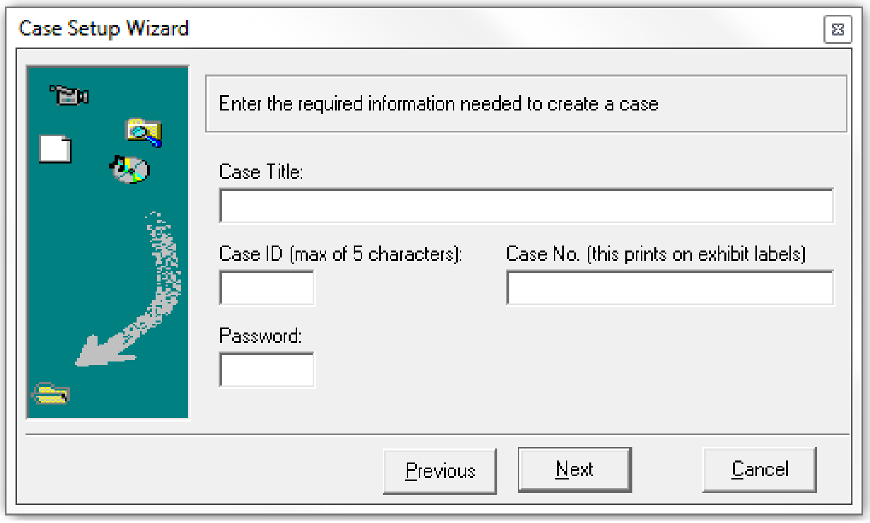
Restore – Opens a file selection dialog box for selecting a Visionary Backup File (.VBK). See Restoring Case Backup Files topic.

Utilities – Displays a dialog for rebuilding database files. See Rebuilding Database Files topic.

Case Setup Wizard

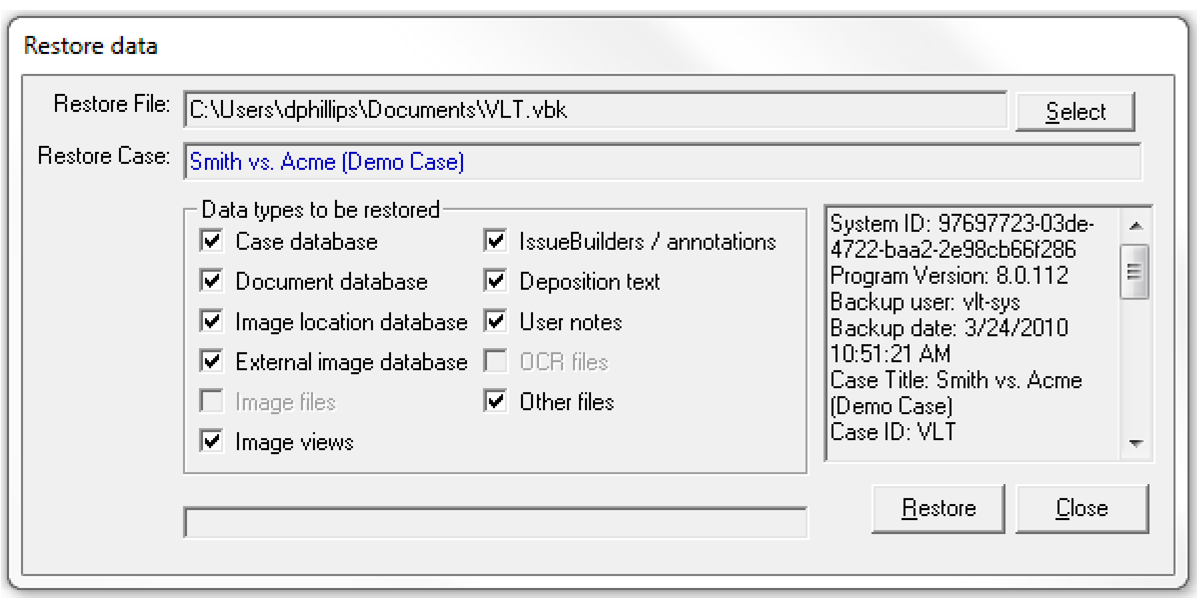
Overview

The Case Setup Wizard can be accessed from the ‘File, New Case’ menu in the Workbench screen or by clicking the ‘Create’ button in the Visionary splash screen window. The Wizard consists of a series of automated steps that guide you through the case creation process.



Creating a case from a VBK file

If you are creating a case from a Visionary Backup File (.VBK), select the ‘Create a new case from a backup file’ on the first screen of the Case Setup Wizard and click the ‘Next’ button. This will open the Restore data window.



- If the backup file was password protected, you will need to enter the password in the appropriate text box before selecting the file.
- Use the Select button to browse to and select the correct backup file.
- The case name will be listed when the case is selected.
- The checkboxes indicate which types of data will be restored. You cannot change these settings.
- When the correct case is listed, click ‘Restore’ to restore your data.
- Your case will now be listed in the Case Selection window. Click the ‘Select’ button to open your case.

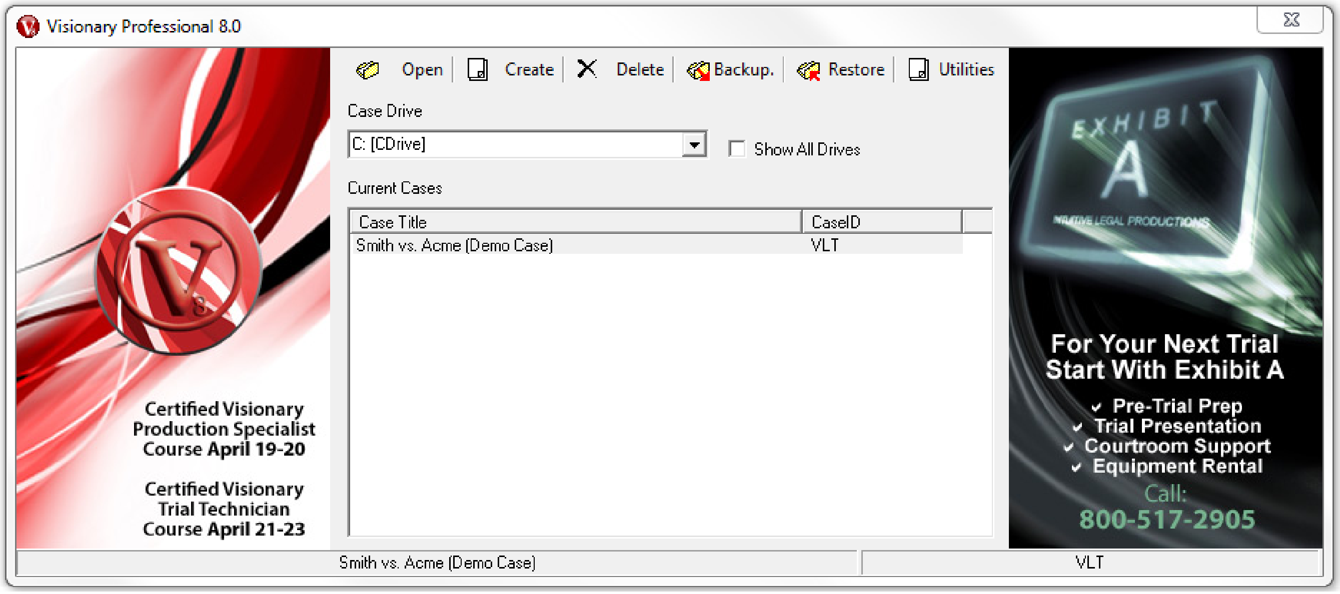
VBK files used to create cases must include: Case database, Image Document DB, Deposition text, IssueBuilders / annotations, Image Location DB, User Notes, and Original transcript data.

Image files may or may not be included with your backup file. It may be necessary to copy them to your hard drive or network separately. In addition, Visionary uses the drive volume name or network share name to identify the location of image files. If the image files were manually copied to your computer or network, it may be necessary to use the Image Volume Redirector to relocate the files in the alternate drive location.

The Case Setup Wizard is used to step through the process of creating a new case, linking that case to external databases such as Summation™ or Concordance™, and importing transcripts, images, and video into your case. All of these functions are also available from within an open case; however, the Case Setup Wizard simplifies the process of setting up a case by asking (or reminding) you what data you wish to import.

Creating a new case

To create a new case, select the "Create " option on the first window of the Visionary Splash screen.



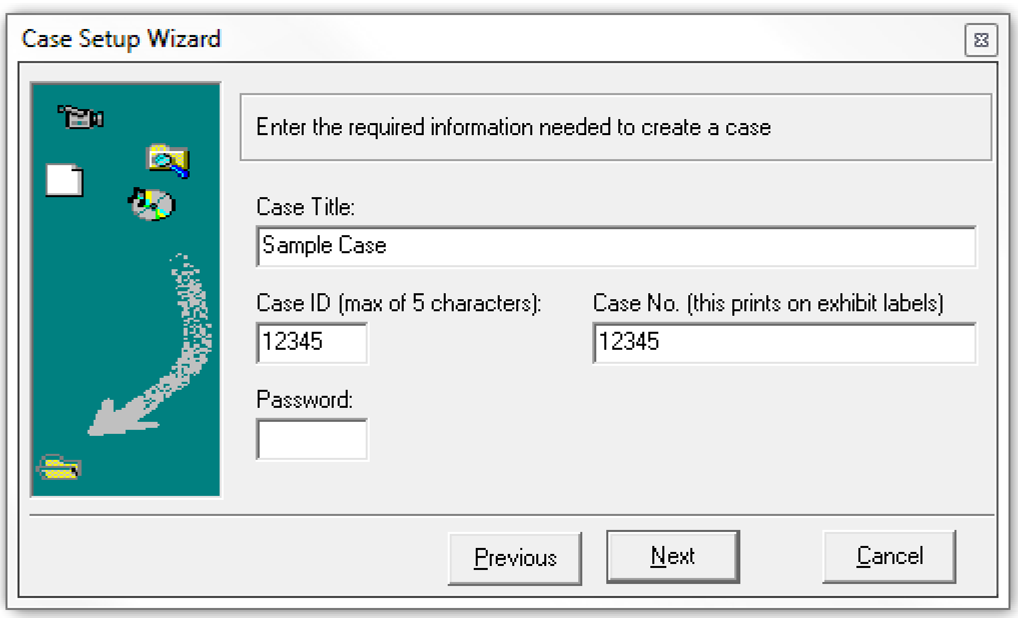
Enter a Case Title, Case ID, and Password (if desired).

Case ID – Can be any 5 characters, and must be unique for your list of cases.

Usually this is an easily recognizable abbreviation of the case name.

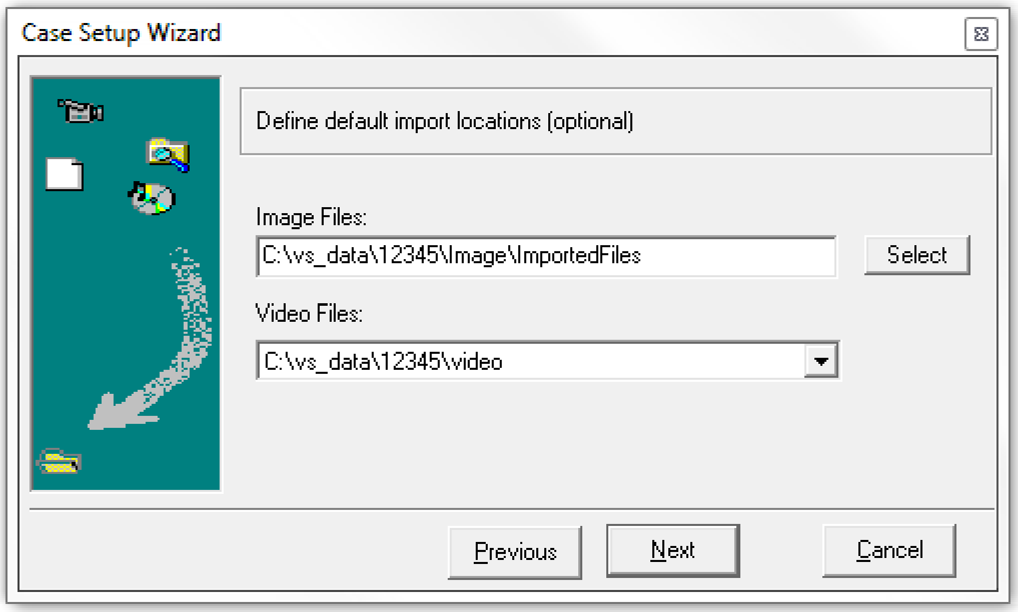
Password – Optional. A basic security measure to detour unintended users from opening the case.

Case No – The number that is printed in the footer of Exhibit Stickers and on reports.

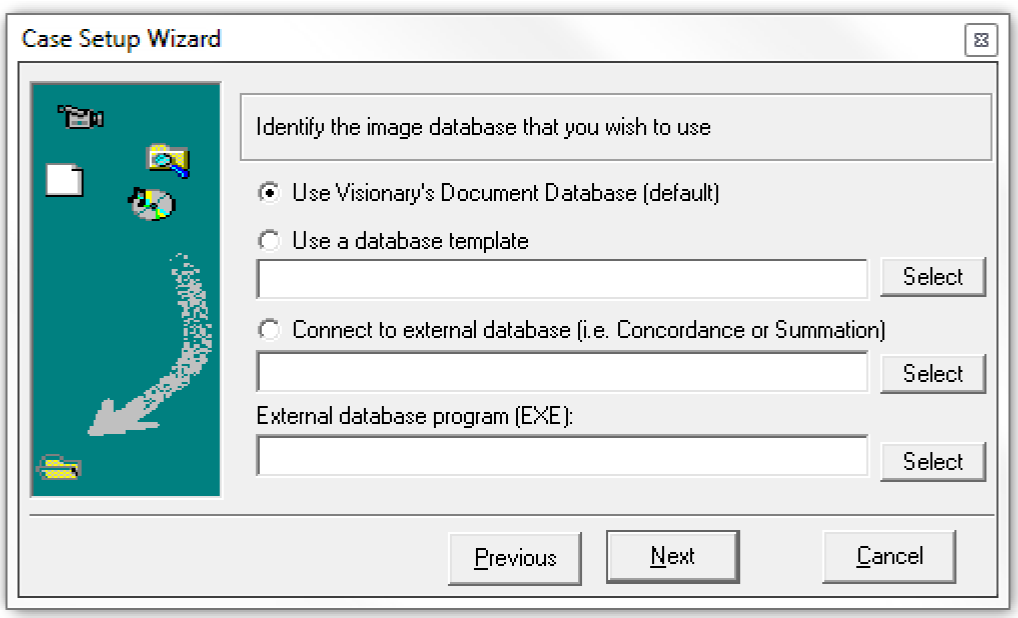


Press the ‘Next’ button when finished. (If a password has been set, a Confirm Case Password window will be displayed. Enter the same password to ensure they match. Then click ‘Ok’.)

The next screen allows you to specify default locations for where video and image files will be placed when importing VDF files from the Visionary Viewer program. Press the ‘Next’ button when finished.



The next screen allows you to link Visionary to a third party database such as Concordance™ or Summation™.



Use Visionary's Document Database – This selection will cause Visionary to us its document database. For most users, this is the best option.

Use a database template – Selecting this option will cause the database template file (i.e. Concordance database) to be copied and used for the case.

Connect to external database – Specifies that Visionary should link to an external database.

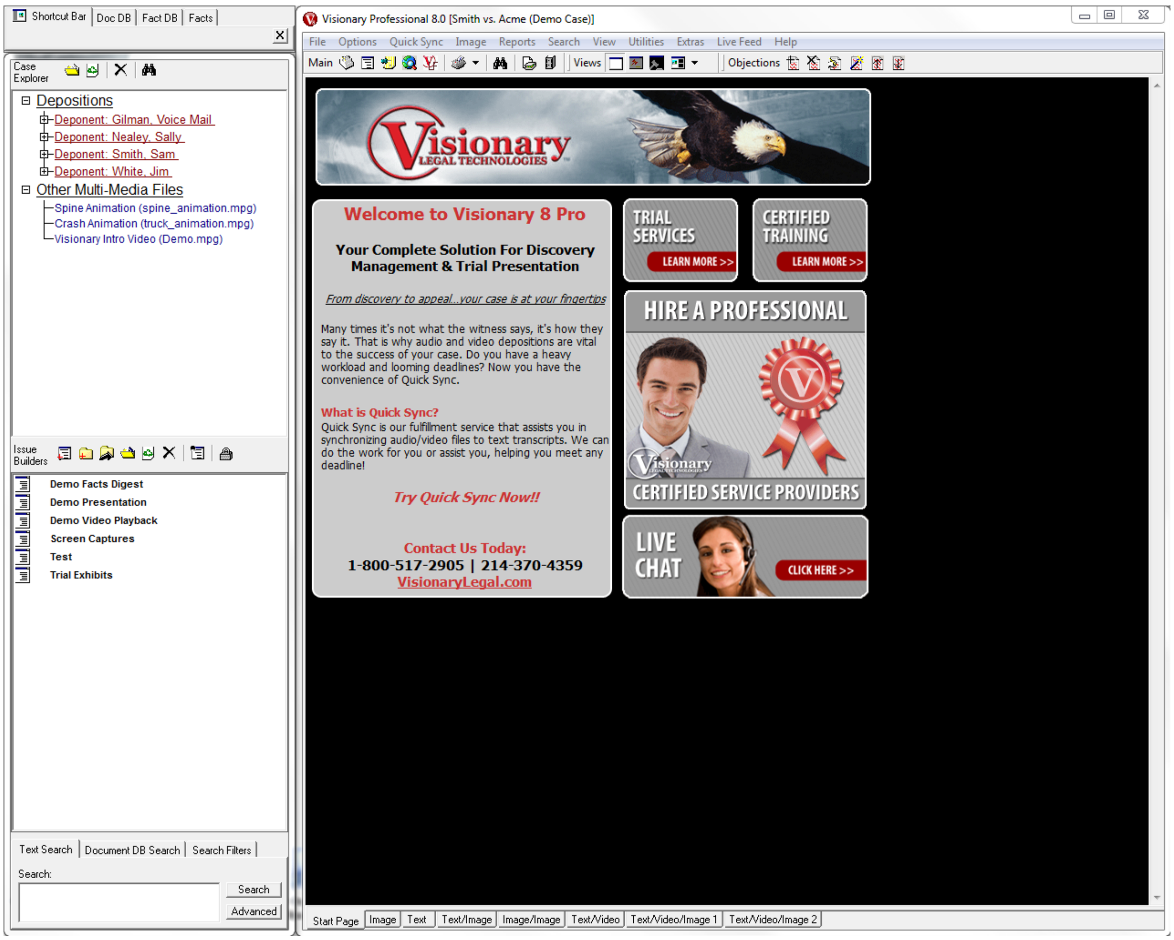
External database program – Specifies the third party program that Visionary should use to open the specified database. See the Concordance and Summation topics for further information.

Depending upon the circumstances, it may be appropriate to select some, none or all of these options. Each option is explained below.

When data importing has finished, the new case may be opened or the program will return to the Select Case window.

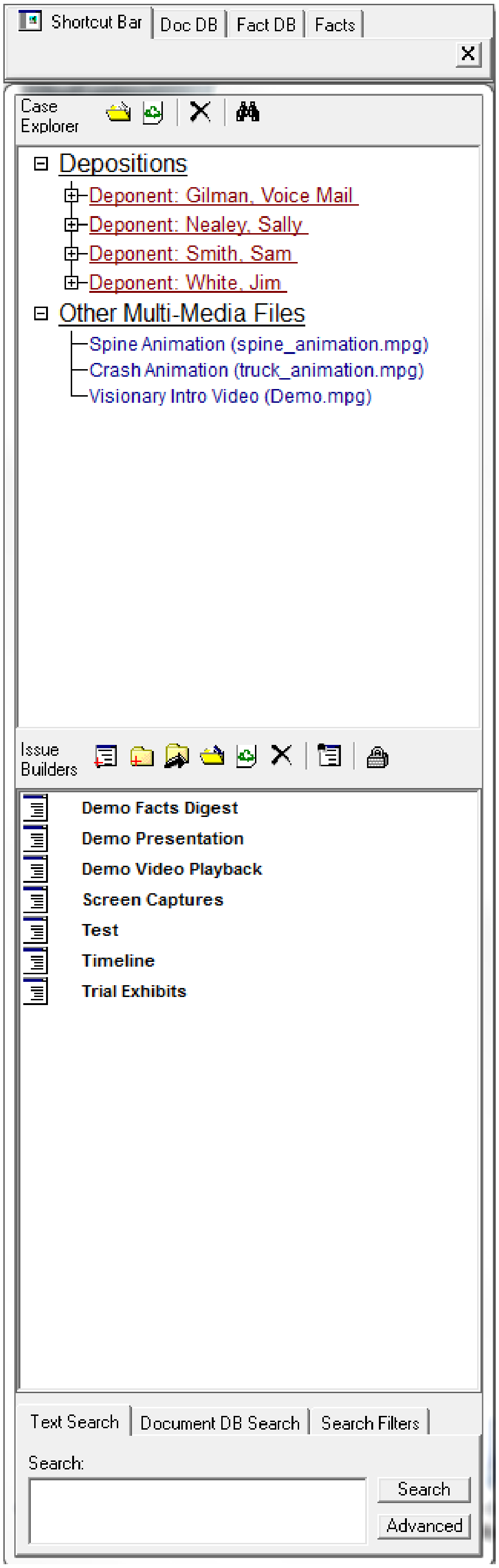
Main Screen Overview

Main Window



Shortcut Window Tab

The Shortcut Window Tab provides an easy way to load transcripts, IssueBuilders, perform searches and switch to different data sources.



Tab Bar - The tab at the top of the window provides a quick way to change between IssueBuilders, Document Database, and Fact Databases. (Click on the tab items for further details).

Case Explorer – Lists the depositions, non-synced video files, slides and timelines (coming soon) for your case. For further details about the Case Explorer toolbar, see the Case Explorer Window topic.

Issue Builders – Lists all the IssueBuilders for your case. For further details about the IssueBuilder toolbar, see the Select IssueBuilder Window topic.

Search Tab – Provides quick access to creating test and database queries. See the Search Window topic for further details.

Transcript Management

Visionary integrates many powerful transcript management features including: full text searches across depositions, transcript issue coding (see Facts Database), synchronized video playback, transcript clip digest creation (see IssueBuilders and Facts Database), image hyperlinking, designation tracking, and printing. Because Visionary's transcript management features are integrated throughout the program, some transcript features are documented in other topic areas. Links to the general transcript management capabilities of Visionary are contained below. However, you may find additional information in the help index.

See Also: Importing Transcripts

Loading Transcripts

Searching Transcripts

Building Transcript Digests & Summaries

Printing Transcripts

Hyperlinking Images to Transcripts

Auto-Hyperlinking Exhibits to Transcripts

Playing Synchronized Video

Objection Clips

Exporting Transcripts

Creating Designations

Importing VDF Files

To import a synchronized transcript VDF File:

1. Select the 'File/Import/Visionary Deposition File' menu item from the main window.
2. Select the file to be imported.
3. Press the 'Open' button.
4. Click anywhere in the case explorer window on the main window to update the deponent list.

Importing Transcripts

How to Import a transcript:

1. Select the "File/Import/Transcript' menu item on the main window.

2.  Tip: After importing a transcript (even from an InData or Sanction file), it is strongly recommended that you confirm the page numbering is correct. The best way to do this is to look in the transcript index (if it has one) and then confirm that one of its references towards the end of the transcript is correct. If it is not correct,

you may use the Transcript Renumber utility in Visionary Sync to fix this problem.Select the transcript file to be imported.

Supported File Types:

3. Visionary currently supports the import of standard ASCII transcript files that adhere to the specifications below and LiveNote™ PST files.

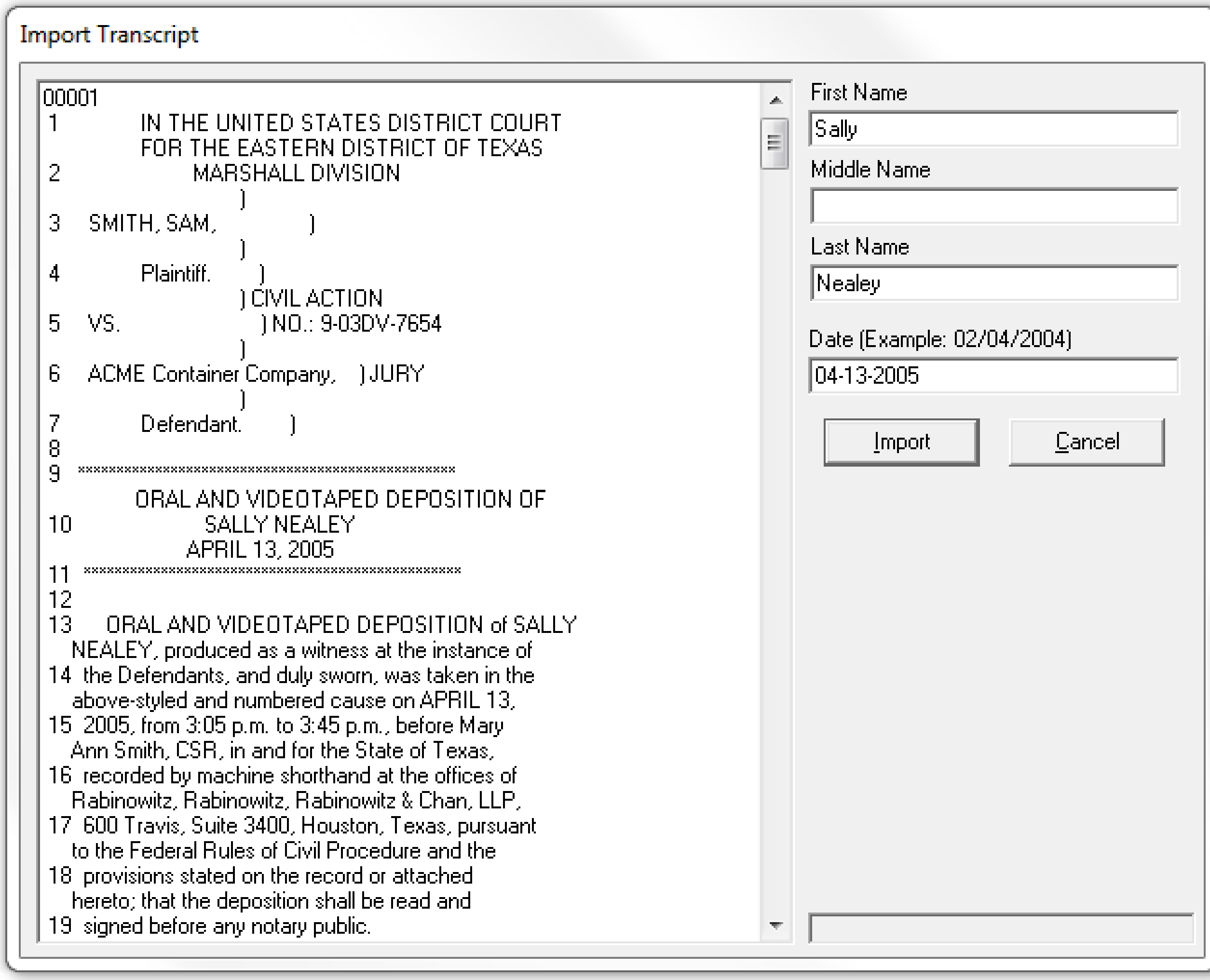
ASCII Transcript Import Specifications

4. Visionary has attempted to make its transcript importer as flexible as possible in its ability to import various transcript formats. Unfortunately, it is impossible for the program to deal with every possible permutation of a transcript and it is therefore STRONGLY recommended that you follow the guidelines below when preparing a transcript for import into Visionary's software. Most current versions popular stenographic software can create files compatible with the import specifications and examples outlined below.
5. TIP: When possible, ask for ASCII transcripts in Amicus™ format.

Required by Visionary

- Transcripts must be less than 65,000 lines (approximately 2600 pages).
- Transcripts should have a consistent number of lines per page.
- Files must be of a generic ASCII format.
- Each line of text should end with a carriage return and then a line feed.
- No lines may be longer than 70 characters (NOT counting valid time stamps, leading spaces and trailing spaces).
- All lines in the body of the transcript should have a line number.
- Time stamps must be placed either at the very beginning or end of the line and must be separated from the rest of the line with at least one space.
- Pages must be numbered contiguously.

6. Click the Next button.
7. Click the 'Open' button. If you are importing a Sanction or InData file, then this is all that needs to be done. If it is an ASCII transcript, enter the specific deposition information in the appropriate fields. See the ASCII Transcript Import Specifications topic below for further information on the types of ASCII files supported by Visionary.



5. Click the import button to complete the import process.
6. Recommended by Visionary
    - Page breaks or form feeds at the end of every page.
    - Page numbers should be at the top of every page.
    - Time stamps should be at the end of each line of text. If they are placed at the beginning, be sure that there is a space between the end of the time stamp and the line number.
    - Do include headers or footers in the files used for import into Visionary software.
    - The title page of the transcript should indicate the page numbers that it contains. (i.e. Pages 256 - 402")
    - If your transcript has time stamps, those time stamps must have an hour, minute, and second value in the format ‘hh:mm:ss’.

Sample Transcripts With Time Stamps. (Time Stamps are Optional)

what we can do about getting a break, whether it 10:09:54
is a short break you need or a longer break. 10:09:56
We'll also have a longer break at lunch time, as 10:10:00

Page 9
well. 10:10:00
You are free to talk to your attorney, 10:10:04
but not after I have asked a question. If I have 10:10:06
asked a question, you need to finish the question 10:10:08
and then ask to take a break, and then you can 10:10:12
talk to your attorney then. 10:10:14
…………………………………………………………………….
okay. 10:10:40
A. Okay. 10:10:40
Q. If you think of any documents that 10:10:42
would help you to recall an answer to a question 10:10:46
that I have, let me know. I might have that 10:10:48
document with me. If we do, I'll show it to you, 10:10:52
and you can answer the question more fully. 10:10:54
A. Okay. 10:10:54

Page 10
Have you had any alcoholic drinks in 10:10:56

10:09:54 what we can do about getting a break, whether it
10:09:56 is a short break you need or a longer break.
10:10:00 We'll also have a longer break at lunch time, as

0009
10:10:00 well.
10:10:04 You are free to talk to your attorney,
10:10:06 but not after I have asked a question. If I have
10:10:08 asked a question, you need to finish the question
10:10:12 and then ask to take a break, and then you

```
10:14  16 6   talk to your attorney then.

10:10:40 18       A.    Okay.
10:10:42 19       Q.    If you think of any documents that
10:10:46 20   would help you to recall an answer to a question
10:10:48 21   that I have, let me know.  I might have that
10:10:52 22   document with me.  If we do, I'll show it to you,
10:10:54 23   and you can answer the question more fully.
10:10:54 24       A.    Okay.

 0010
10:10:56 1    Have you had any alcoholic drinks
```

Sample Transcript Without Time Stamps.

```
24     is a short break you need or a longer break.
25     We'll also have a longer break at lunch time, as

0009
 1     well.
 2  You are free to talk to your attorney,
 3     but not after I have asked a question.  If I have
 4     asked a question, you need to finish the question
 5     and then ask to take a break, and then you can
 6     talk to your attorney then.
…………………………………………………

20     would help you to recall an answer to a question
21     that I have, let me know.  I might have that
22     document with me.  If we do, I'll show it to you,
23     and you can answer the question more fully.
24   A.    Okay.
25   Q.    If we don't have it, then we'll try to

0010
 1     see what we can do otherwise.
```

Non-ASCII Transcripts

Visionary cannot import transcripts in non-ASCII formats such as Microsoft Word or WordPerfect. Transcripts in these formats should be opened in Word or WordPerfect and resaved into an ASCII format that preserves line breaks. In some cases it may be necessary to adjust the font size and/or margins before saving to end up with a properly formatted transcript.

Transcripts Without Page or Line Numbers

Visionary requires that transcripts contain page and line numbers. Although you can add page and line numbers to ASCII transcripts, it is HIGHLY ILLADVISED to use these utilities because of the great likelihood that the end result will be different from the official transcript. The best advice on what to do when this happens if to get a version of the transcript that has valid page and line numbers.

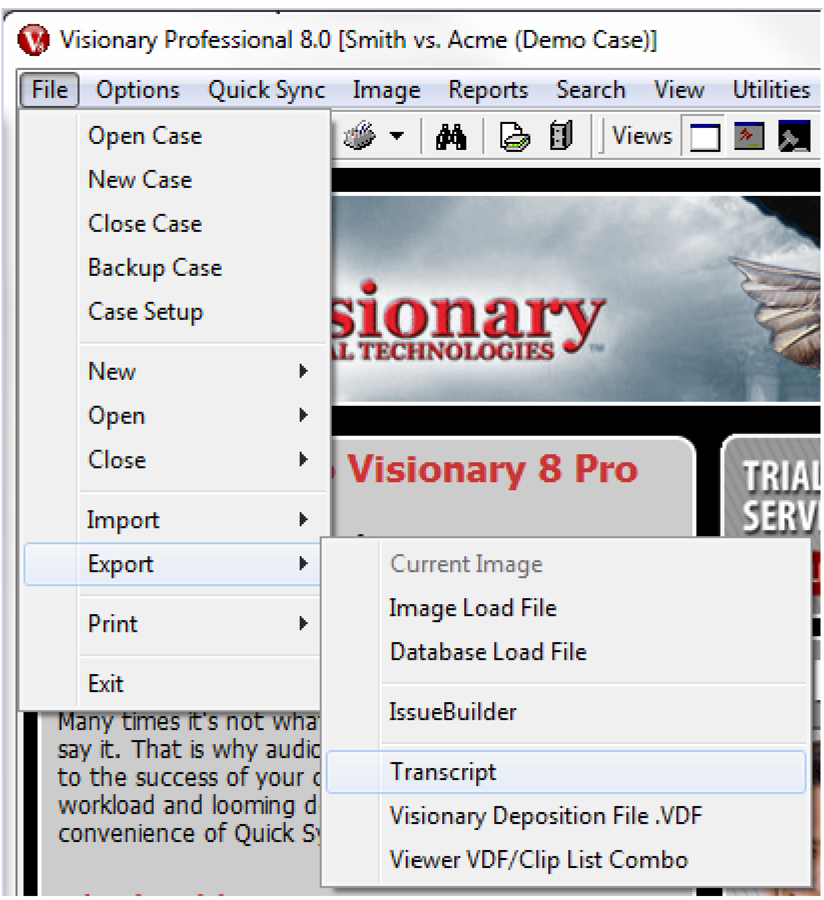
Cleaning Up Poorly Formatted Transcripts

Microsoft Word offers many useful search and replace functions that can simplify the process of cleaning up poorly formatted transcripts. See the Using MS Word's Find & Replace topic for more information.

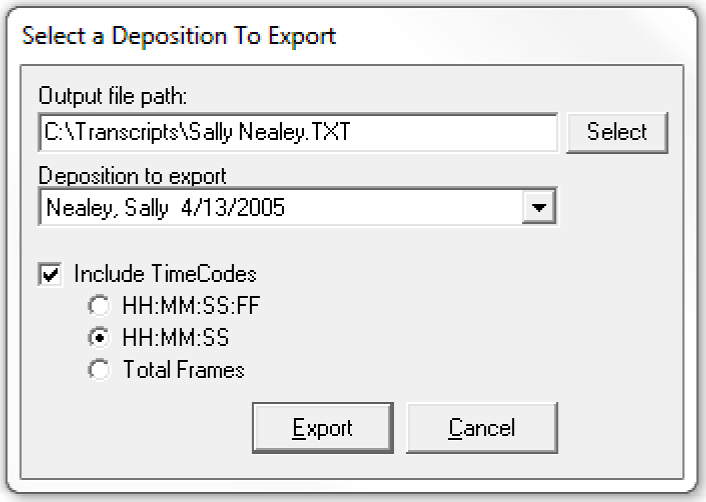
Exporting Transcripts

To export a transcript to ASCII format:

1. Select the ‘File/Export/Transcript’ menu item on the main window.



2. Select the output parameters from the ‘Select a Deposition to Export’ dialog box.



Output file path – Identifies the path and file name of the ASCII file that is to be created.

Deposition to export – identifies the transcript to be exported.

Include Time Stamps option – determines whether or not time stamps (that correspond to the video file time) will be added to the end of each line in the transcript.

3. Press the ‘Export’ button.

Loading Transcripts

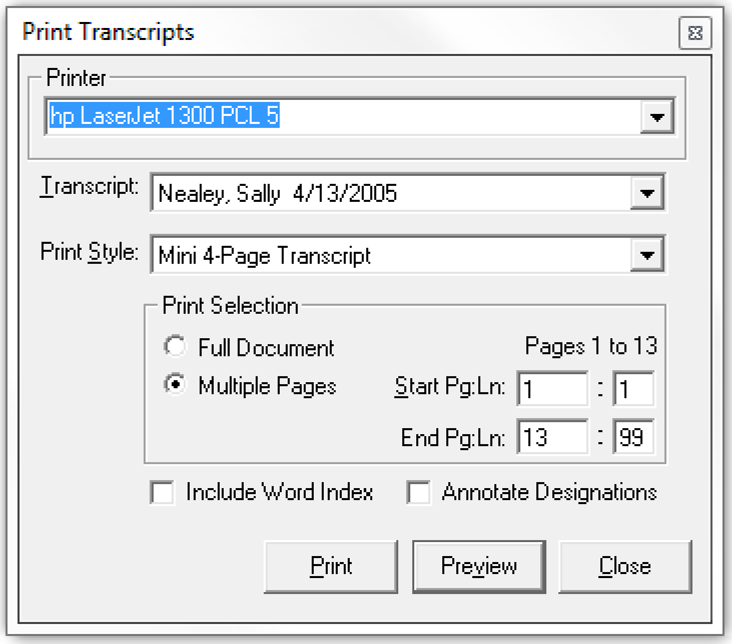
To load a transcript:

1. Double click on the deposition that you wish to load in the Case Explorer region of the Shortcut Window or select the ‘File / Open / Case Explorer’ menu item and then double click on the deposition that is to be loaded.To clear the transcript region on the main window:
   1. Select the ‘File / Close / Text’ menu item on the main window.
   2. See Also: Displaying Text in CourtViewer Mode

Printing Transcripts

To print a transcript:

1. Select the ‘File / Print’ menu item on the Main Window or press the ‘Print’ icon  mainscreen_IconPrint.bmp} on the toolbar of the Main Window.
2. Select the transcript to be printed and set the other print options as required.



Print Style – Sets the printing format.

Print Selection – Sets whether the entire transcript will be printed or just selected pages.

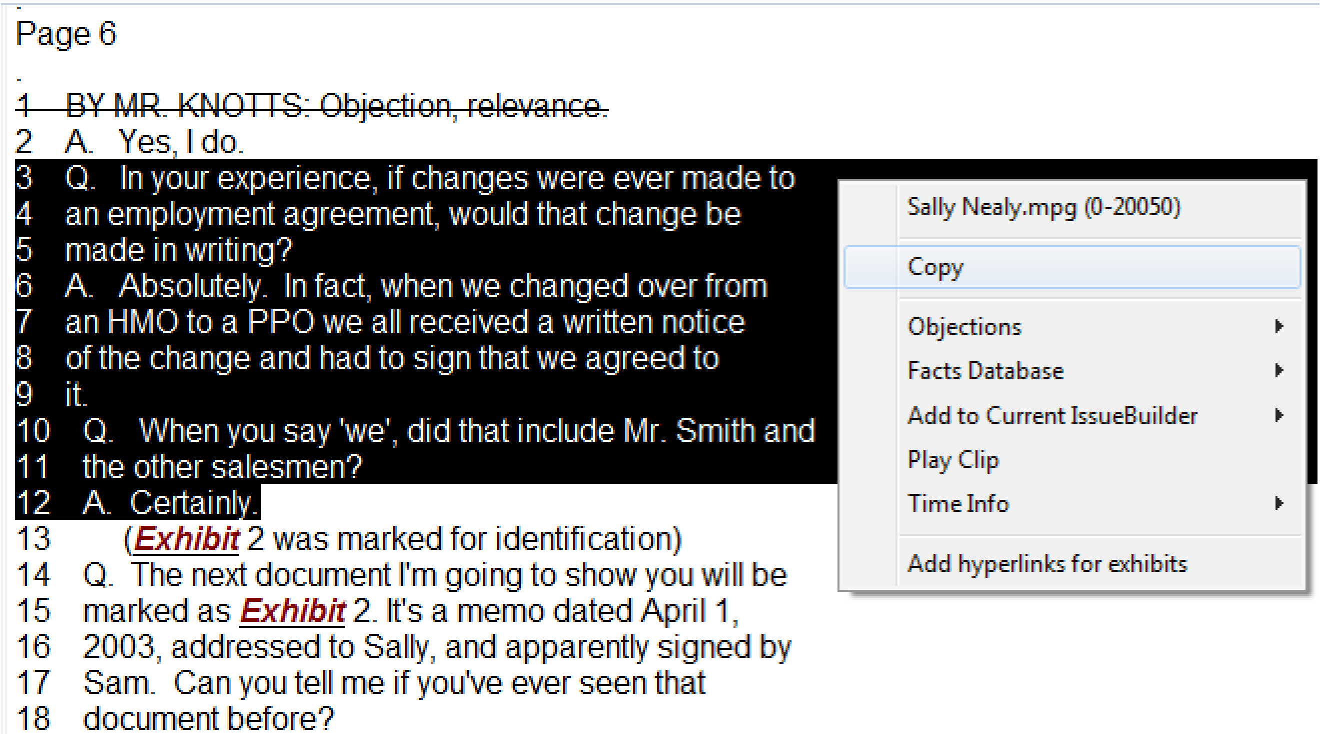
Include Word Index – If checked, a word index for the printed text will be added to the end of the printout.

Annotate Designation – If checked, portions of transcripts identified as designations (See Transcript Designations topic) will be annotated in the print out.

3. Press the 'Print' or 'Preview' button.

Copy & Paste with full annotations.

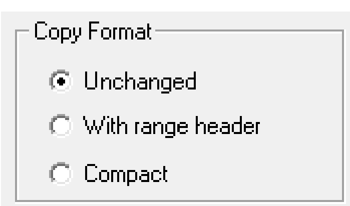
Highlight the section of the transcript you wish to copy. Right click and select 'Copy'



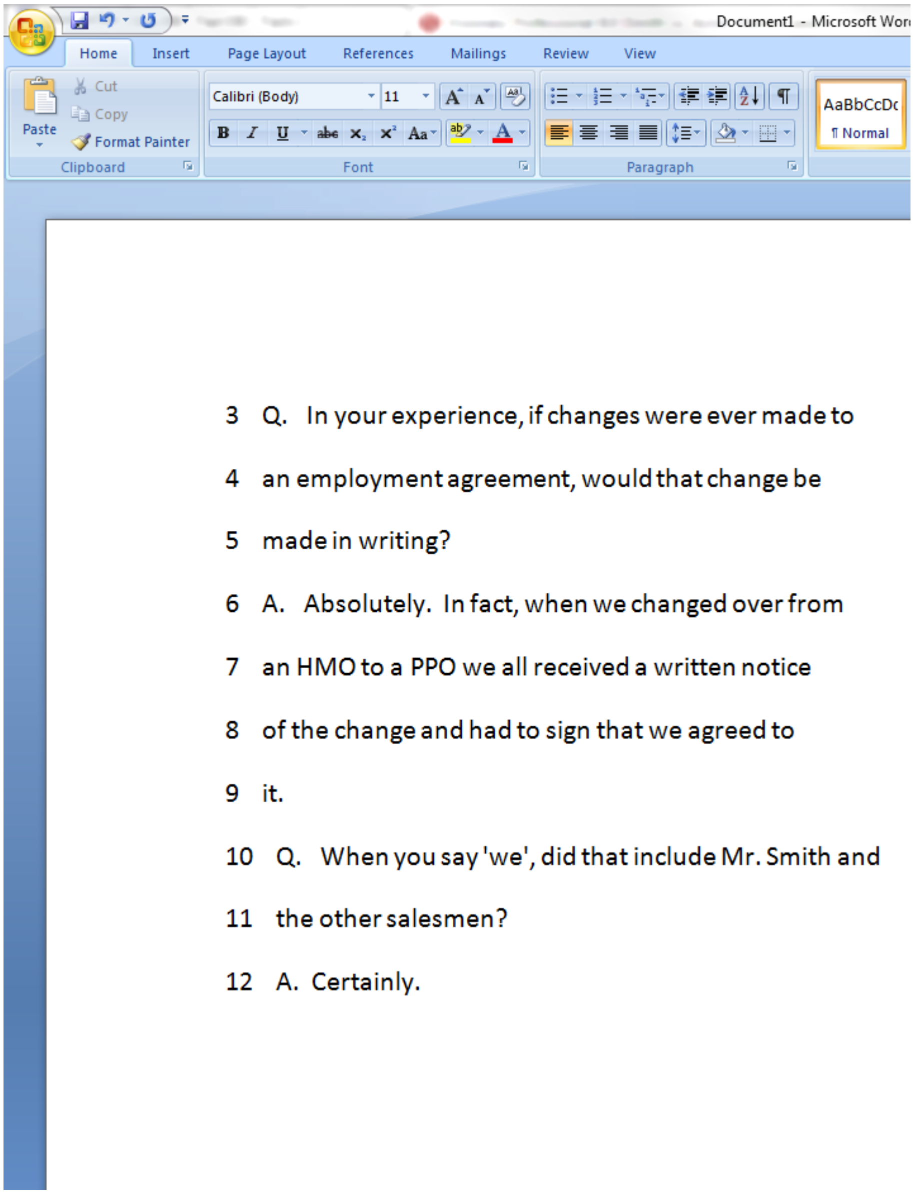
This copied information can be pasted into other programs such as PowerPoint, Word, Notepad, ect. In the program you wish to copy the information to, right-click and select 'Paste" to paste the highlighted text.

The output will vary depending on what is selected for the 'Copy Format' on the 'Text' tab of the 'Preferences' screen. To view and change these options select 'Options' from the main toolbar, then select 'Preferences'.

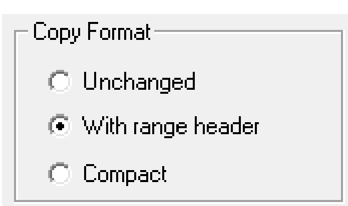
Unchanged



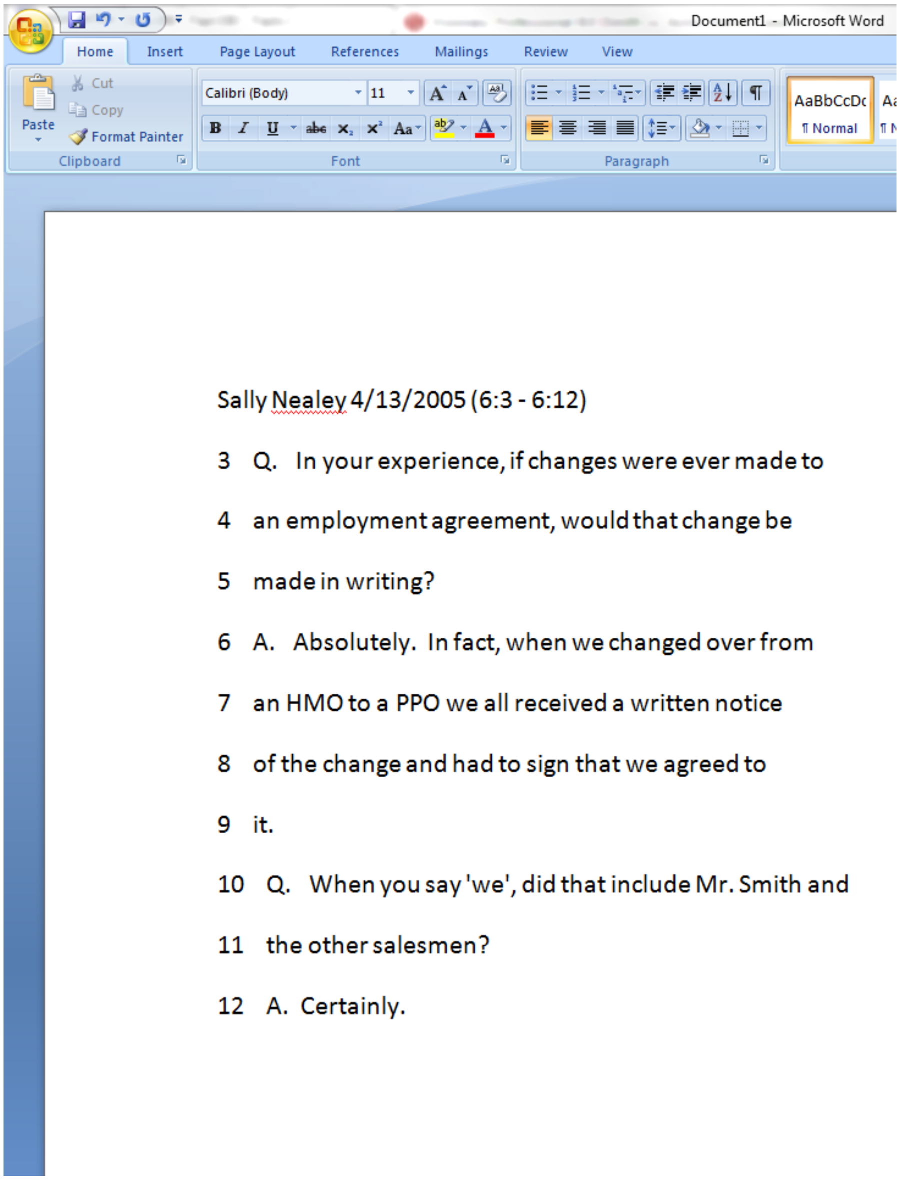
This option will copy the selected text exactly as it appears in Visionary.



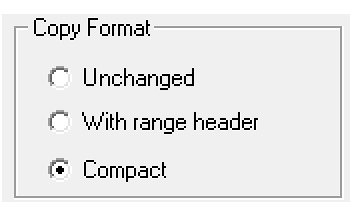
With Range Header



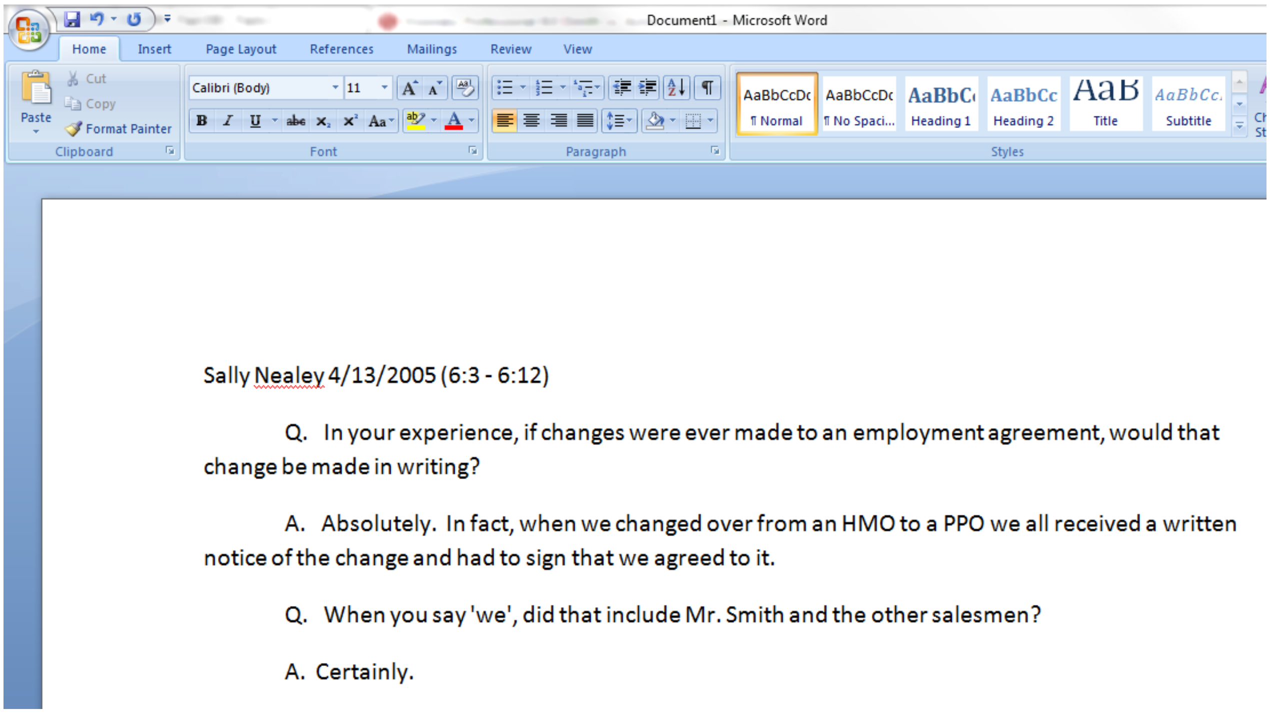
This option will copy the selected text with an annotation at the top displaying the name of the deponent, date of the deposition, and the page and line numbers.


Document1 - Microsoft Word
Home
Insert
Page Layout
References
Mailings
Review
View
Paste
Cut
Copy
Format Painter
Clipboard
Calibri (Body)
11
Font
Paragraph
AaBbCcDc
¶ Normal
Sally Nealey 4/13/2005 (6:3 - 6:12)
3 Q. In your experience, if changes were ever made to
4 an employment agreement, would that change be
5 made in writing?
6 A. Absolutely. In fact, when we changed over from
7 an HMO to a PPO we all received a written notice
8 of the change and had to sign that we agreed to
9 it.
10 Q. When you say 'we', did that include Mr. Smith and
11 the other salesmen?
12 A. Certainly.

Compact

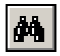

Copy Format
Unchanged
With range header
Compact

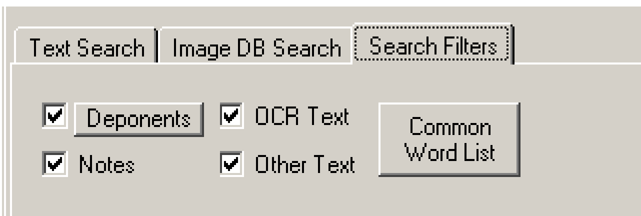
This option will copy the selected text in a condensed format showing the question and answer pairs without the line numbers at the beginning of each individual line. An annotation will appear at the top displaying the name of the deponent, date of the deposition, and the page and line numbers.



Searching Transcripts, OCR & Other Text

To search transcripts, OCR, and/or other text:

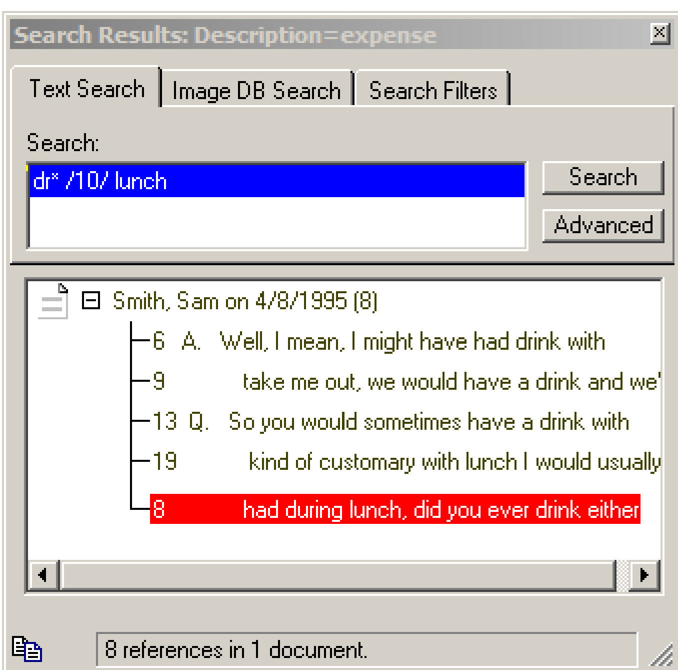
1. Click on the search icon  on the main window's toolbar to display the search window.
2. On the search window, select the 'Search Filters' tab and select the data types that you wish to search.



Deponents Button – Displays a dialog that allows you to select which deponents to search. See the Filtering Deponents topic for more information.

Common Word List – Displays a dialog that allows you to define the 'common word' list. The common word list defined the set of words that are not indexed. For more information about the common word list feature, see the Common Word List topic.

3. On the search window, select the 'Text Search' tab.
4. Enter the words or phrase that you wish to search for.



5. If desired, you can press the ‘Advanced’ button to reveal the Advanced Search Operator assistant. See the Search Operators topic for a list of all the Boolean and proximity that are available when performing full text searches.

6. Press the ‘Search Button’.

OCR & Other Text

Using OCR Files In Visionary

Visionary provides users the ability to perform full-text searches on scanned documents using OCR text files. If produced correctly, Visionary will automatically display the scanned version as well as the OCR text when viewing an OCR search result. For further information on using OCR files in Visionary, please review the following topics:

Searching OCR Files

Importing OCR Files

Linking OCR Files to Images

What Is OCR?

Importing OCR Files

To import OCR files into Visionary:

1. Make sure that the OCR files that you wish to import adhere to the following standards:

    a. The file should be in ASCII format.
    b. The name of the file should match the DocumentID value stored in the Document Page Database. Note that this requirement does not always mean the OCR file name is the same as the corresponding image file.
    c. Ideally, there should be one OCR file per document, as opposed to on OCR file per page. Absent this requirement, text search results that should produce results when words or phrases cross pages will fail.
    d. If there are page breaks in the OCR file (ASCII character 12), Visionary will use the page breaks to display the proper image page.
    e. Files should have a TXT or OCR file extension.

2. Copy the OCR files to the OCR folder in your case folder. The location of your Case Folder is dependent upon the CaseID property that was set when your case was created, however, the general location of your case folder is: [Data Drive Letter]:\vs_data\[CaseID]\ocr. For example, the folder where you would place the OCR files for a case whose CaseID='case01' would be 'c:\vs_data\case01\ocr'.

Visionary will automatically index and search any files that it locates in the OCR folder.

Note: OCR files can be placed in sub folders of your design providing that these sub folders are contained inside of the case's OCR folder.

Linking OCR Files to Images

OCR files are linked to image files by the OCR file name (see the Importing OCR Files topic for details). When an OCR file is displayed, Visionary uses the OCR file name, which should be the same as the DocumentID for the record that it relates to, determining which image file to load. In addition, if the OCR file has page breaks, (ASCII character 12) Visionary will attempt to move to the corresponding image page as a user scrolls through the OCR file text.

See Also:Displaying OCR Files

Displaying OCR Files

OCR files are only displayed from query results. Visionary does not currently provide a mechanism to view OCR files in a manner independent of queries.

See Also: Searching OCR Files

Importing Other Text Files

To import Other (ASCII) files into Visionary:

1. Make sure that the files that you wish to import are ASCII files and not some other format like RTF, Word, Word Perfect, etc.
2. Copy the ASCII files to the 'Other' folder in your case folder. The location of your Case Folder is dependent upon the CaseID property that was set when your case was created, however, the general location of where the Other ASCII files should be placed is: [Data Drive Letter]:\vs_data\[CaseID]\other. For example, the folder where you would place the ASCII files for a case whose CaseID='case01' would be 'c:\vs_data\case01\other'.

OR

3. Select the 'File / Open / Other Text File' menu item from the main window. Select a file, and when asked if you want to copy the selected file to the 'Other' folder, answer 'Yes'.

Displaying Other Text Files

To view 'Other' (ASCII) files:

1. Select the ‘File / Open / Other Text File’ menu item from the main window.
2. Select the file that you wish to open. By default you will be prompted to select files that are in the ‘Other’ folder for your case.

User Notes

Visionary's User Note feature allows users to create notes that can be searched and added to IssueBuilders. If you need to associate a note with a specific portion of a transcript or document, consider using the Fact Database. For more information on notes, refer to the following topics:

Opening Notes

Creating Notes

Deleting Notes

Adding Notes To IssueBuilders

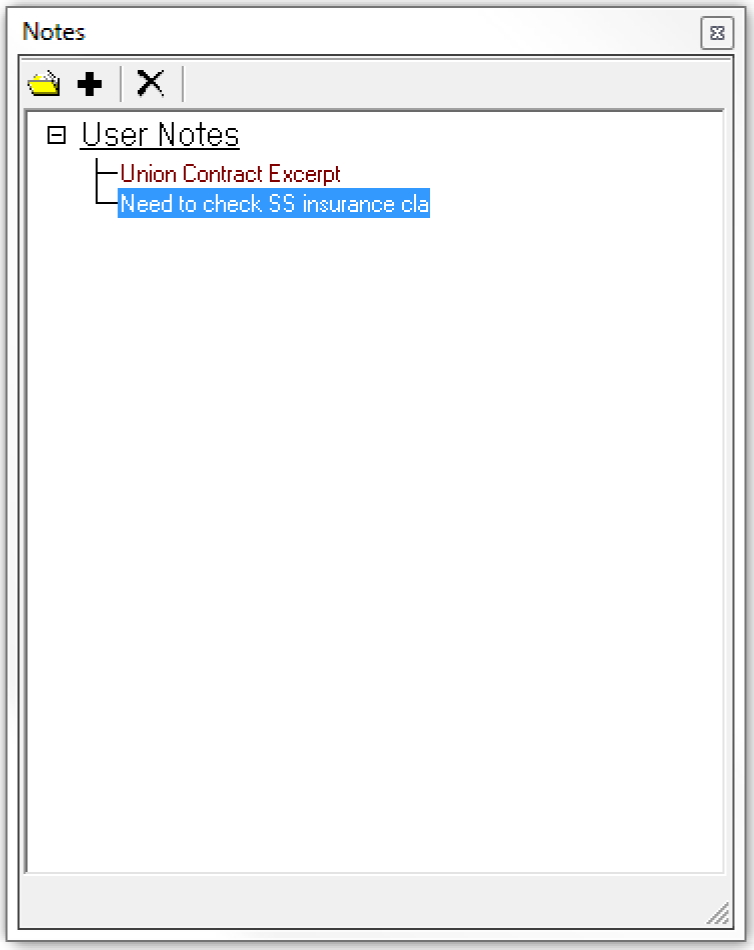
Searching Notes

Note Selection Window

Once a note is saved, it can be opened or deleted form the Browse User Notes window.

To open the Browse User Notes Window:

Select the 'Open / Notes' menu item on the main window or press the 'Open Note' icon  on the toolbar of the main window.

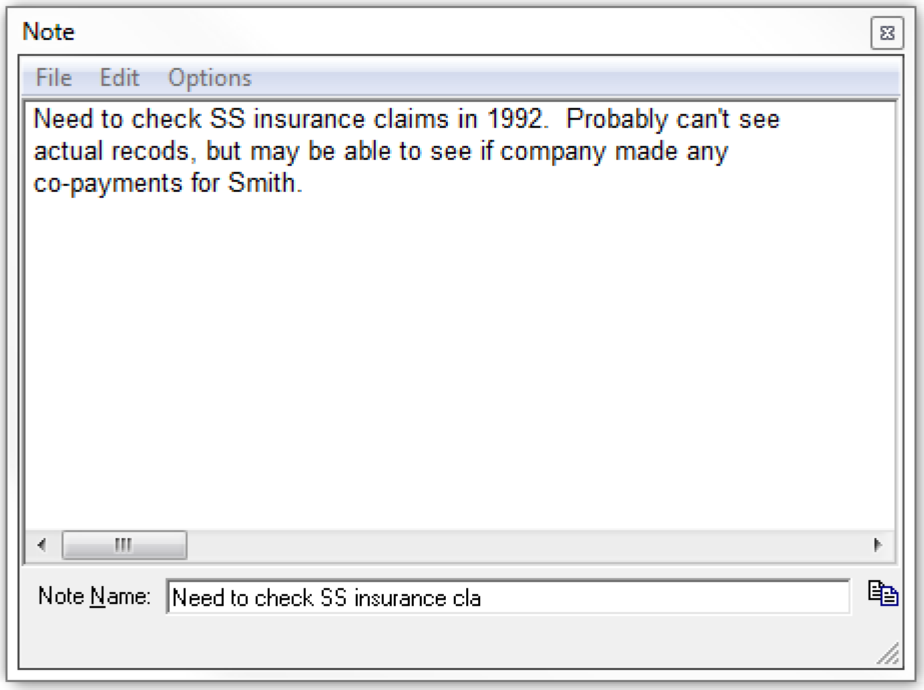


 - Add new note.

 - Open selected note.

 - Delete selected note.

Note Window



File Menu

Save – Saves the current note.

Save New – Saves the current note as a new note.

Exit – Closes the notes window.

Edit Menu

Cut – Cuts the currently selected text to the Windows Clipboard.Copy – Copies the currently selected text to the Windows Clipboard.

Paste – Pastes text currently contained in the Windows Clipboard.

Options Menu

Word Wrap – Toggles word wrapping on/off.

Creating Notes

To create a User Note:

1. Select the ‘File / New / Note’ menu item on the main window.
2. Enter in the note text.
3. Save the note by:

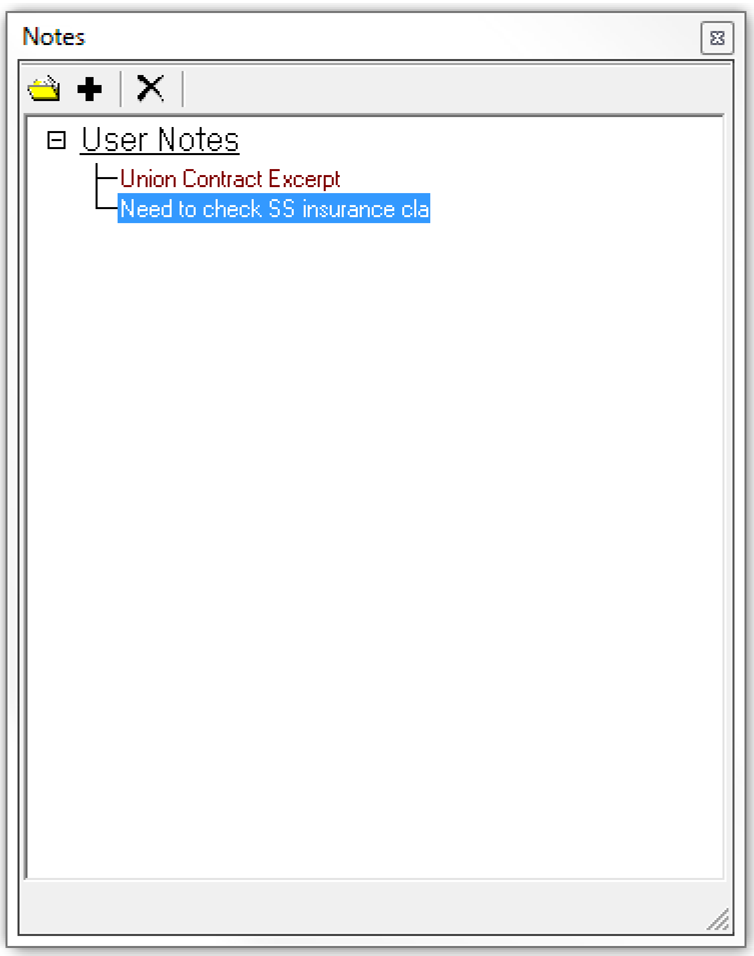
   a. Selecting the ‘File / Save New’ menu item on the Note window; or
   b. Dragging the Note Drag icon on to an IssueBuilder.

See Also: Adding Notes To IssueBuilders

Opening Notes

To open a User Note:

1. Open the Browse User Notes window by selecting the ‘File / Open / Notes’ menu item or pressing the Notes icon on the main window’s toolbar.
2. Select the note that you wish to open.



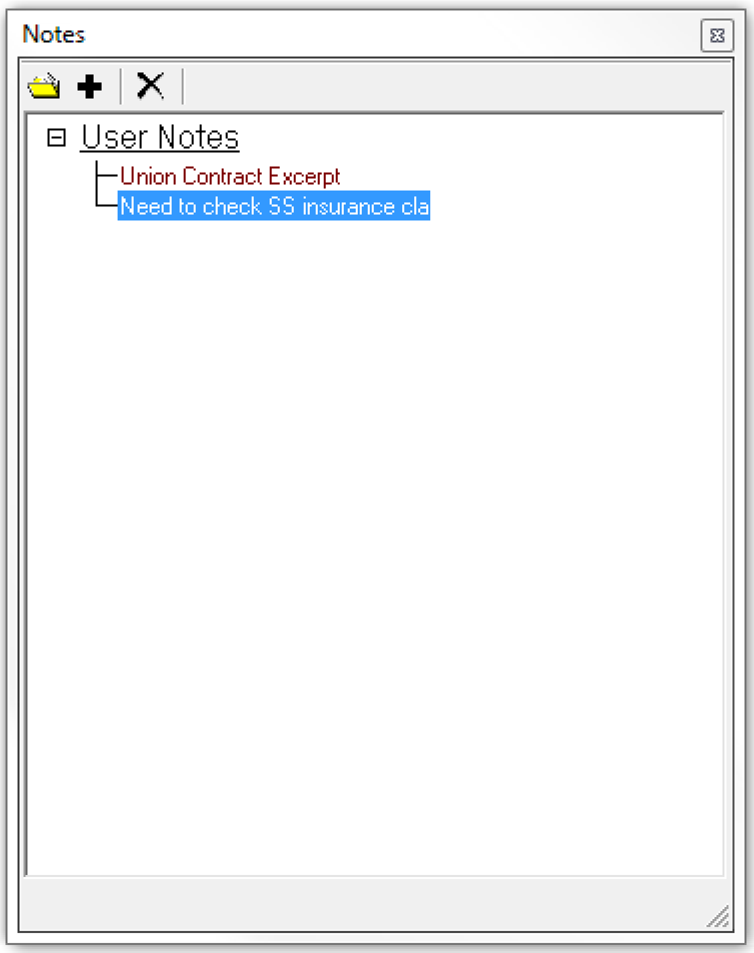
Press the ‘Open’ icon  on the Browse User Notes toolbar.

 Note: Notes saved to IssueBuilders can also be opened from the IssueBuilder in which they were saved.

Deleting Notes

To delete a User Note:

1. Open the Browse User Notes window by selecting the ‘File / Open / Notes’ menu item or pressing the Notes icon  on the main window’s toolbar.
2. Select the note that you wish to delete.



3. Press the ‘Delete’ icon  on the Browse User Notes toolbar

Adding Notes

To add a note to an IssueBuilder:

1. Open the IssueBuilder that is to receive the note
2. Open a note
3. Either drag the Drag Icon on the note onto the IssueBuilder, select the ‘Item / Add / Note’ menu item or press the ‘Add Note’ icon on the toolbar.

Associating Notes With Images

Visionary’s Fact Database feature can be used to create searchable user notes that are associated with documents at the page level. See the Mid Topic ID: FactsDB Create From Images topic for more information.

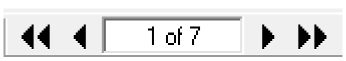
Displaying & Annotating Images

Displaying Images

Visionary provides a robust set of tools for importing, reviewing, coding, annotating, and locating scanned documents. Images can be displayed from the Document Database, Fact Database, IssueBuilders, and by using the navigation buttons located under the image display region on the main window. For a more thorough review of how to display and manipulate images in Visionary, review the topics listed under See Also.

To display an image using the navigation buttons on the main window:

1. Make sure that images have been imported into the current case.
2. Use the ‘View’ menu or Views Tab on the Main Window to switch to a view that displays the image-viewing window. (See the View Menu topic)
3. Use the image navigation bar located under the image display window to move through the population of images.



See Also:Document Database

Document Page Database

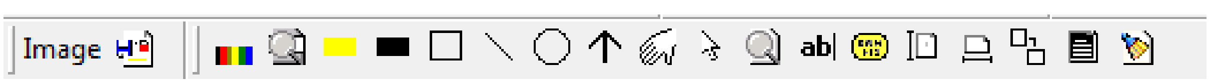
Importing Image Files ntent.

Displaying an IssueBuilder Item

Facts Database

Image Annotations

Visionary supports a rich set of image annotation, sizing, and rotation features. These features can be enabled using the toolbars on the main screen, CourtViewer screen and through the use of shortcut keys.



Icon Description   Shortcut

Save Image View - if the current image was loaded from an IssueBuilder, this updates the image view (annotation, rotation, and zoom) properties for that IssueBuilder item.	
Annotation Properties – Sets color, font, and line thickness properties	
Crop Zoom	Ctrl+1
Highlight	Ctrl+2
Redact	Ctrl+3
Square	Ctrl+4
Line	Ctrl+6
Circle	Ctrl+5
Arrow	Ctrl+7
Scroll Page	Ctrl+9
Annotation Selector	Ctrl+0
Zoom	Ctrl+8
Text	Ctrl+=
Exhibit Sticker	
Fit-to-Height	Ctrl+H
Fit-to-Width	Ctrl+W
Rotate	Ctrl+[Arrow Keys]
Scale-to-Gray	
Clear All Annotations	Ctrl+D
Delete Last Annotation	End

To add an annotation to an image:

1. Click on the desired annotation icon located on the Main Window's, CourtViewer Window's, or CourtViewer Control Window's image toolbar.
2. Press and hold the left mouse button anywhere in the image region and drag the mouse to size and position the annotation.

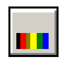
See Also:Modifying Annotation Properties

Moving Annotations

Deleting Annotations

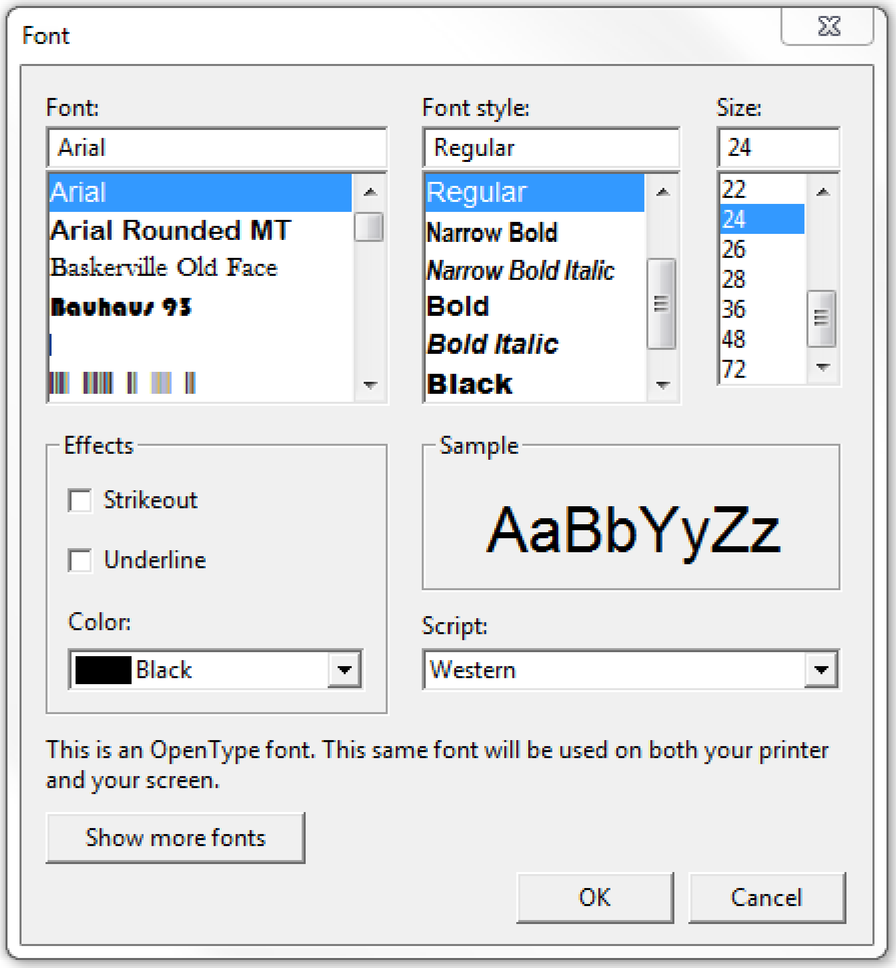
Modifying Annotation Properties

To change the color, line thickness or font properties of an annotation:

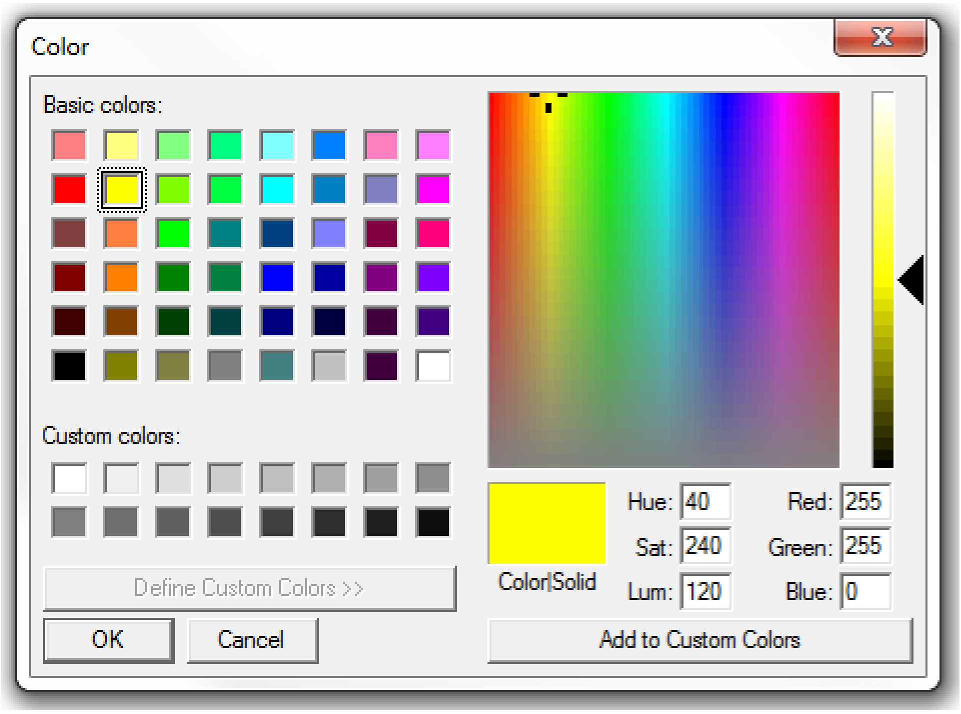
1. Click on the annotation icon  located on the Main Window’s, CourtViewer Window’s, or CourtViewer Control Window’s image toolbar.
2. Click on the Annotation Properties icon  on the Image toolbar on the main window.

    a. For annotations that have a line element, you will see options to select the line width as well as an option to select the annotation color.

    b. For text annotations, pressing the Annotation Properties button will cause a Font Selection dialog to be displayed. This dialog allows both the font style and color to be set.

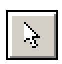


For all other annotations, the color selection dialog is displayed.



Moving Annotations

To move an image annotation:

1. Click on the annotation sector icon  located on the Main Window's, CourtViewer Window' s, or Presentation Control Window's image toolbar.
2. Click on the annotation to be moved.
3. Drag the annotation to the desired position.

Navigating Through Images

To move to the next or previous document or page:

Use the navigation toolbar located under the images window.

<< - Move to previous document.

< - Move to previous page of current document.

> - Move to next page of current document.

>> - Move to next document.

To jump to a specified page in a document:

1. Click on the page text box , enter the page number, and press the ‘Enter’ key.

2. See Also: Changing Pages in CourtViewer

3. CourtViewer Control Window

Deleting Annotations

To delete the last created annotation:

Press the ‘End’ key on the keyboard immediately after creating the annotation.

To delete a single annotation:

1. Switch to the annotation selection tool by clicking on the annotation selection icon on the image toolbar located on the main window, CourtViewer Window, or CourtViewer Control Window.
2. Click on the annotation to be deleted.
3. Press the ‘Delete’ key.

To delete all the annotations displayed on an image:

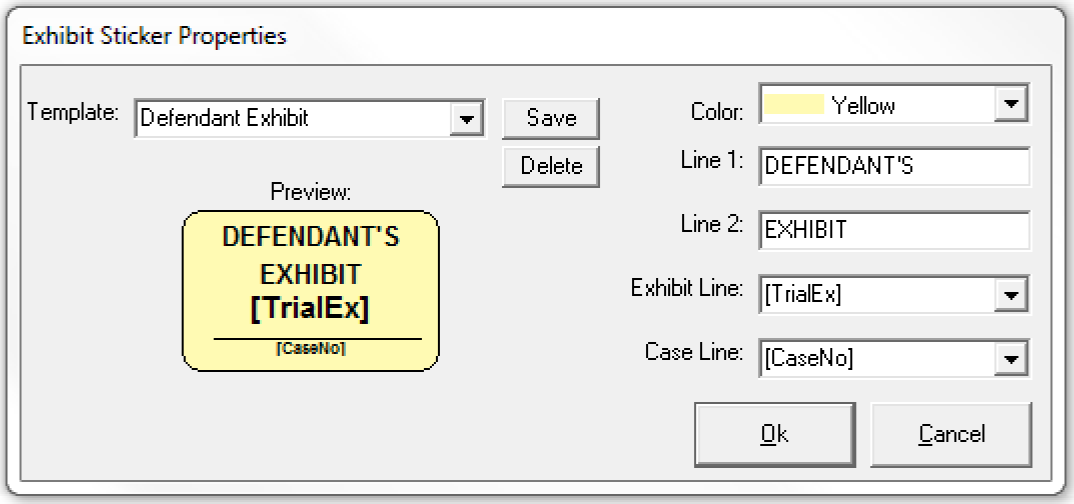
1. Click on the image viewing area.
2. Click on the ‘Delete all Annotations’ icon on the image toolbar located on the main window, CourtViewer window, or CourtViewer Control window or Press ‘Ctrl-D’.

Exhibit Stickers

Exhibit Stickers can be added to images for display and print. Exhibit number and case number information can be added on a sticker-by-sticker basis or pulled from the database.

To add an exhibit sticker to an image:

1. Select the Exhibit Sticker annotation icon on the Main Window.
2. Set the desired output format on the Exhibit Sticker Properties dialog:



Template – Allows you to select an Exhibit Template.

Color – Sets the color of the sticker.

Line 1 & 2 – Exhibit sticker description lines.

Exhibit No – Identifies either a database field to display or user-entered exhibit no.

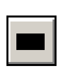
Case Line – Identifies either the case number associated with the case or user-entered information.

 The case number field can be set in the dialog that's displayed by selecting the 'File/Setup Case' menu item.

Redactions

Visionary provides the ability to create, display and print redactions on images using the redaction annotation tool.

To redact part of an image:

1. Click on the annotation icon  located on the Main Window's, Screen Overview: Single Screen or Presentation Control Window image toolbar.
2. Press the left mouse button anywhere in the image region and drag the mouse to size and position the redaction area.

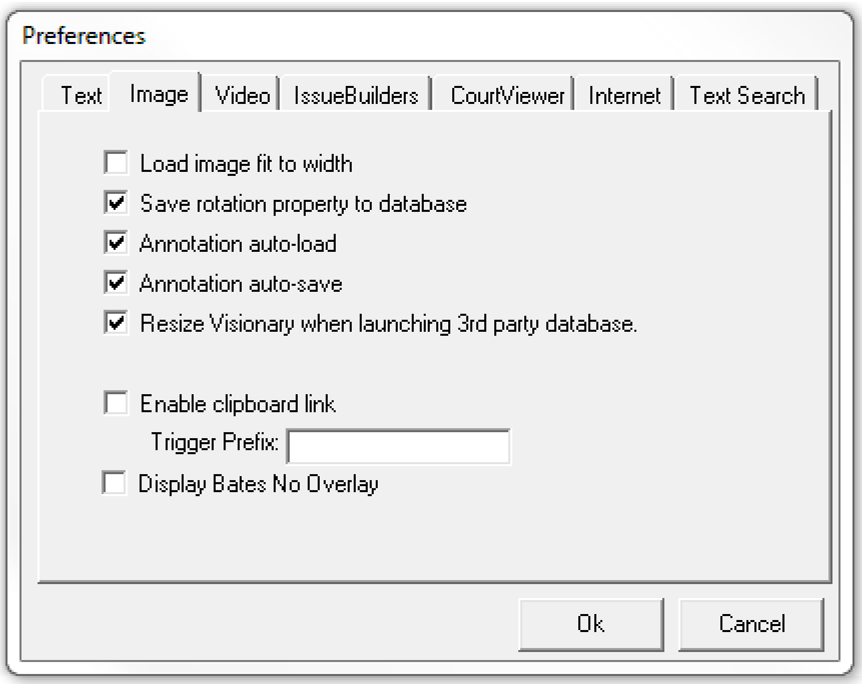
Note: Redactions are automatically saved when applied CourtViewer mode and displayed the next time that the image is displayed. In addition, redactions do not clear when the other annotations are cleared in CourtViewer mode.

Saving Annotations With Images

When properly configured, Visionary will automatically save image annotations as they are applied during the document review process. This allows annotations to automatically be displayed when users recall an image while browsing or displaying the results of searches. In addition, image annotations are saved when creating new image IssueBuilder items or new Image Views.

To associate an annotation(s) with an image:

1. Make sure that the ‘Annotation auto-load’ and ‘Annotation auto-save’ options are checked in the Image Preferences dialog that is accessed from the ‘Options / Preferences’ menu on the main window.



2. Display an image.
3. Apply an annotation by selecting an annotation from the image annotation toolbar and then dragging across a region of the image.

4. Move to another page or document, your annotation(s) are now saved and will be recalled the next time that the image is displayed in the main window (assuming that your preferences are set to display annotations).

Note: Annotating images does not create a new copy of the image or alter the original image in any way. Visionary stores all annotations in a small file that describes how to draw the annotations and then redraws them whenever images are displayed.

See Also: Displaying Images

Image Annotations

Supported Image Formats

BMP

All 2, 4, 8, and 24-bit bi-level, gray scale, and color, uncompressed BMP and OS/2 Bitmap images are supported.

PCX

Originally developed by ZSOFT for its PC Paintbrush program, PCX is a graphics file format for graphics programs running on PCs.

Supported Image types:

- Monochrome

- 16 color

- 256 color

- 24-bit color

TIFF

Supported Compression Types:

- Uncompressed
- Packbits
- Modified Huffman encoding
- CCITT Group 3 1D
- CCITT Group 3 2D
- CCITT Group 4

Supported Color Formats

- Monochrome
- 256 color
- Grayscale
- 24-bit color
- CMYK

DXF

Data Exchange File, a two-dimensional graphics file format supported by virtually all PC -based CAD products

2 Dimensional DXF files are supported.

EPS

Encapsulated PostScript is the graphics file format used by the PostScript language, usually implies that the file contains a bit-mapped representation of the graphics for display purposes.

Level1 (b/w & grayscale) Encapsulated postscript files with and without display images are supported. If the EPS file doesn't contain a TIFF or Windows Metafile display image then the filename of the EPS image will be displayed.

FlashPix

FlashPix is a format designed with the Internet in mind. Developed by Kodak, this format is intended to transfer and display high definition images quickly across the Web.

WMF

Only metafiles, which conform to the Aldus Placeable Metafile Format, are supported. Most applications that export or import metafiles support this format.

Targa

TrueVision Targa file, used in paint, graphics, and imaging apps.

All 8, 16, 24, and 32 bit images are supported. Versions 1 & 2 of the file format are supported although compressed images in V 1.00 format may take longer to display than Version 2 images.

IMG

All IMG files are supported.

GEM raster is the native storage format for the Graphical Environment Manager, developed and marketed by Digital Research.

JPEG

All JPEG files in compliance with the JFIF standard are supported. Progressive JPG images are supported. Full support for both loading and saving 8 bit grayscale jpeg images. Loads some jpeg images that do not fully conform to the JFIF specification.

WPG

Word Perfect Graphic Format.

PCD

Kodak PhotoCD files.

PNG

Supports reading standard and interlaced PNG images.

PDF Support

PDF images may be viewed in Visionary by importing them in the same manner as other image files. Professional Edition users benefit from being able to convert PDF files to TIFF during the import process. Converting PDF's to TIFF's enables users to reference PDF content at the page level rather than the document level and also allows PDF content to be zoomed and annotated. See Importing Image Files for further details.

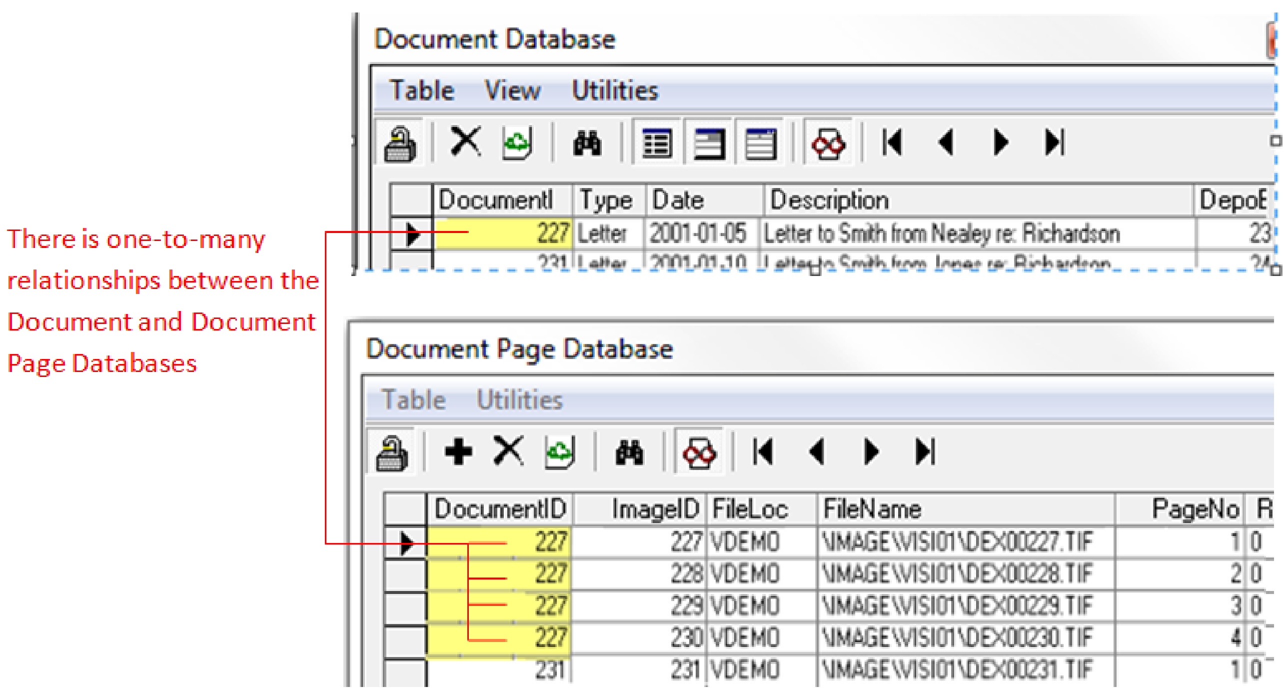
Document & Document Page Databases

Visionary 8.0 Document & Document Page Databases

Visionary includes a fully configurable document database that allows you to code imaged documents. This database is implemented in an open MS Access™ database, so it can be manipulated both inside of Visionary and directly inside of MS Access. Text and memo fields are fully text search able and you also have the option of creating lookup fields to ensure consistent coding standards. You may also elect to use Visionary in conjunction with other popular database programs such as Concordance™ and Summation™. (See Linking to 3rd Party Programs.)

Document Database vs. Document Page Database

Visionary uses two databases to manage your images. The first database is called the Document Page Database. This database stores a record for every page of every document and provides the information on how to locate the actual image or document files. The second database is called the Document Database. This database stores one record per document. As an example, if your database has a 10-page letter, there would be 10 records in the Document Page Database and one record in the Document Database.

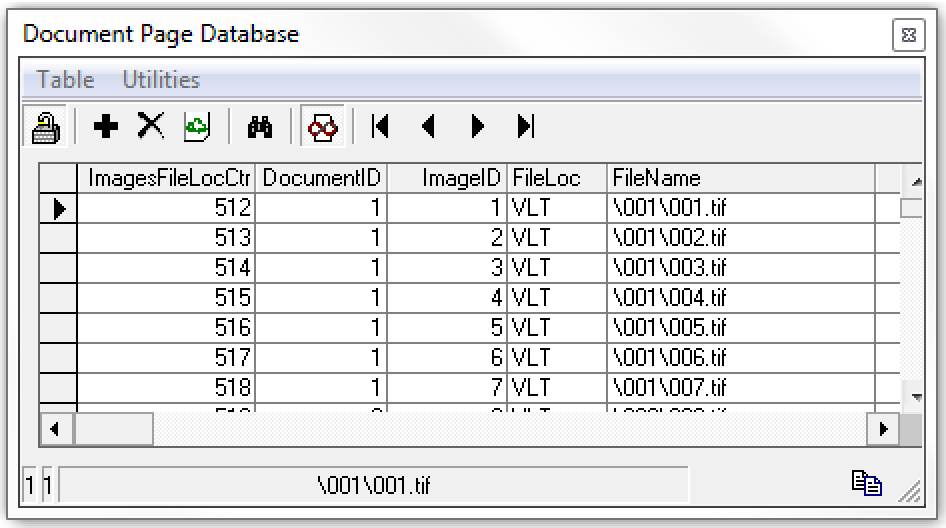


Document Page Database Window

Sorting Data   Table Menu   View Menu   Utilities Menu

Overview

The Document Page Database window displays the location for every page for each document that has been imported into a case (See Importing Images & Documents topic). This topic explains the function of the toolbar and menu items contained in this window.

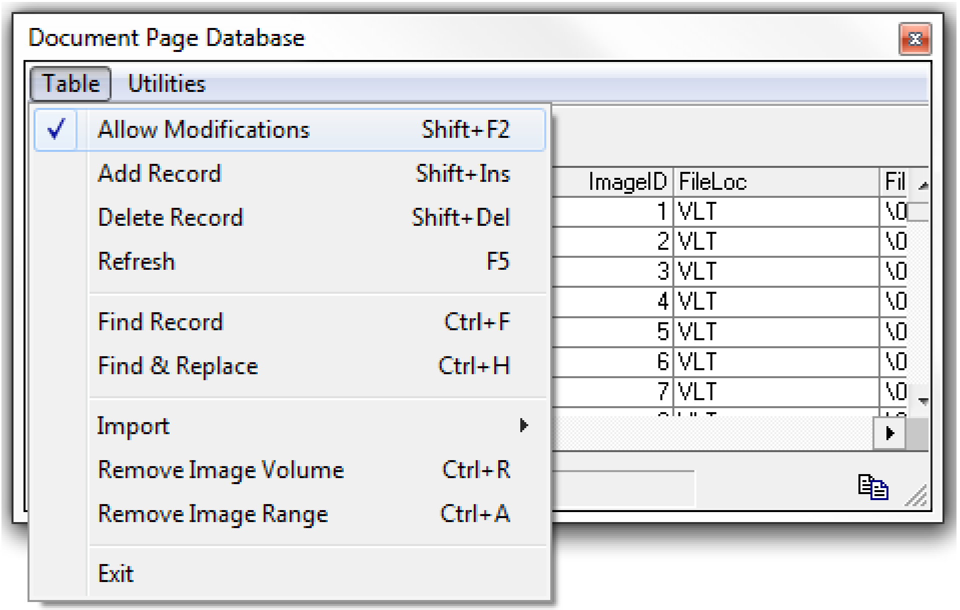


Sorting Data

By double clicking on the heading labels of the Document Page Database grid, the information will be sorted by that specific heading. For instance, double clicking where it says "ImageID" will sort all of the image records in alphanumeric order by Image ID.

To select a record, click on the box to the left side of the desired record. Once a record is selected, it can be displayed if Auto Load Images is selected, edited if Allow Table Modifications is selected, or dragged and dropped into an IssueBuilder or text using the "Drag an Drop Icon" on the bottom right hand corner of the database window.

Table Menu



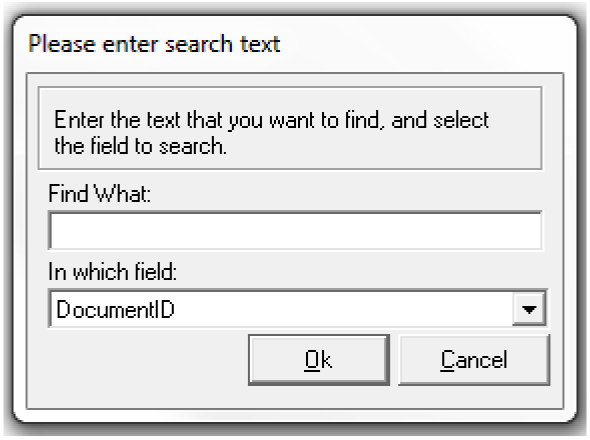
Allow Table Modifications - When this option is selected, the information contained in the table may be modified. When it is deselected, the table is read-only, and no modifications are allowed. Please use caution when editing the information contained in this table, as it will affect where Visionary looks for the images, and may prevent the images from being displayed.

Add Record – Adds a record with a randomly generated Document ID and Image ID.

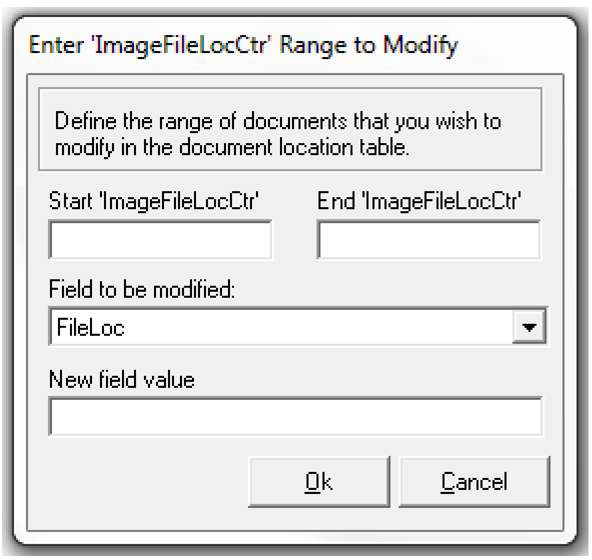
Delete Record – Deletes the currently selected record from the database.

Refresh – Reloads the table data, sorting then redisplaying the information.

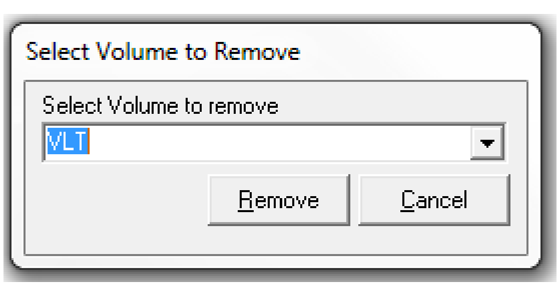
Find Record – Displays a ‘Find’ dialog that allows you to locate a specified page record.



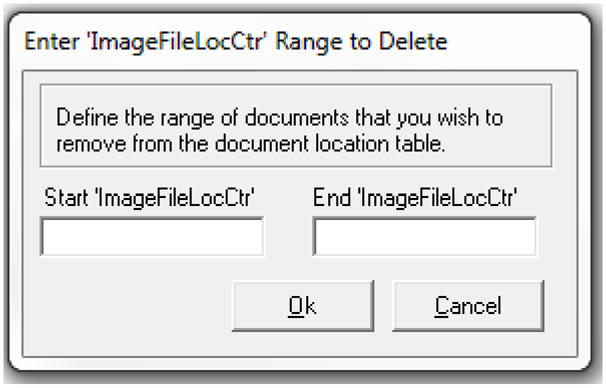
Find And Replace – This option will load the following window. You may alter the File-Loc field for a range of image/documents.



Remove Image Volume – This option will load the following window. Select the Volume to Remove and click the Remove button. This will remove all specified records with parameter = FileLoc.



Remove Image Range – This option will load the following window. Select a range of records using the ImagesFileLocCtr field to remove from the database.

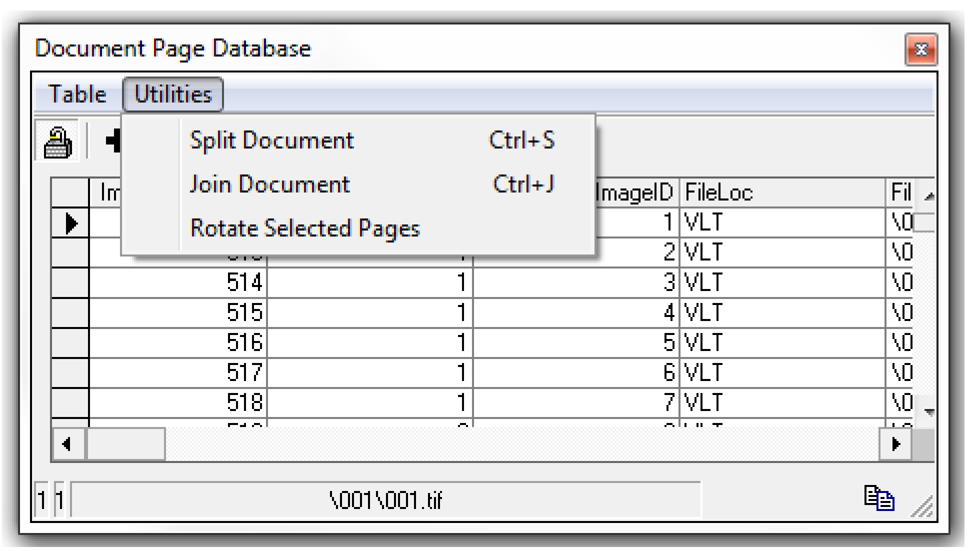


Exit – This option will close the Document Page Database.

Views Menu

Auto Load Images – Selecting this option will cause images to automatically be loaded into the Document window whenever a new image record is selected.

Utilities Menu



Split – Makes the database entries necessary to split the selected document at the selected page.

Note- Multi-page image files cannot be split. Only documents where each page is a separate file can be split. An example of a multi-page image file would be DocumentID 235 in the Demo case. In this example we have an 8-page document where each page is associated to file Vis35.tif. This file cannot be split.

Merge – Makes the database entries required to merge the current document with the previous document.

Note – Multi-page image files cannot be joined to single or other multi-page image/documents. You may join single page image files with multi-page files or other single page image files.

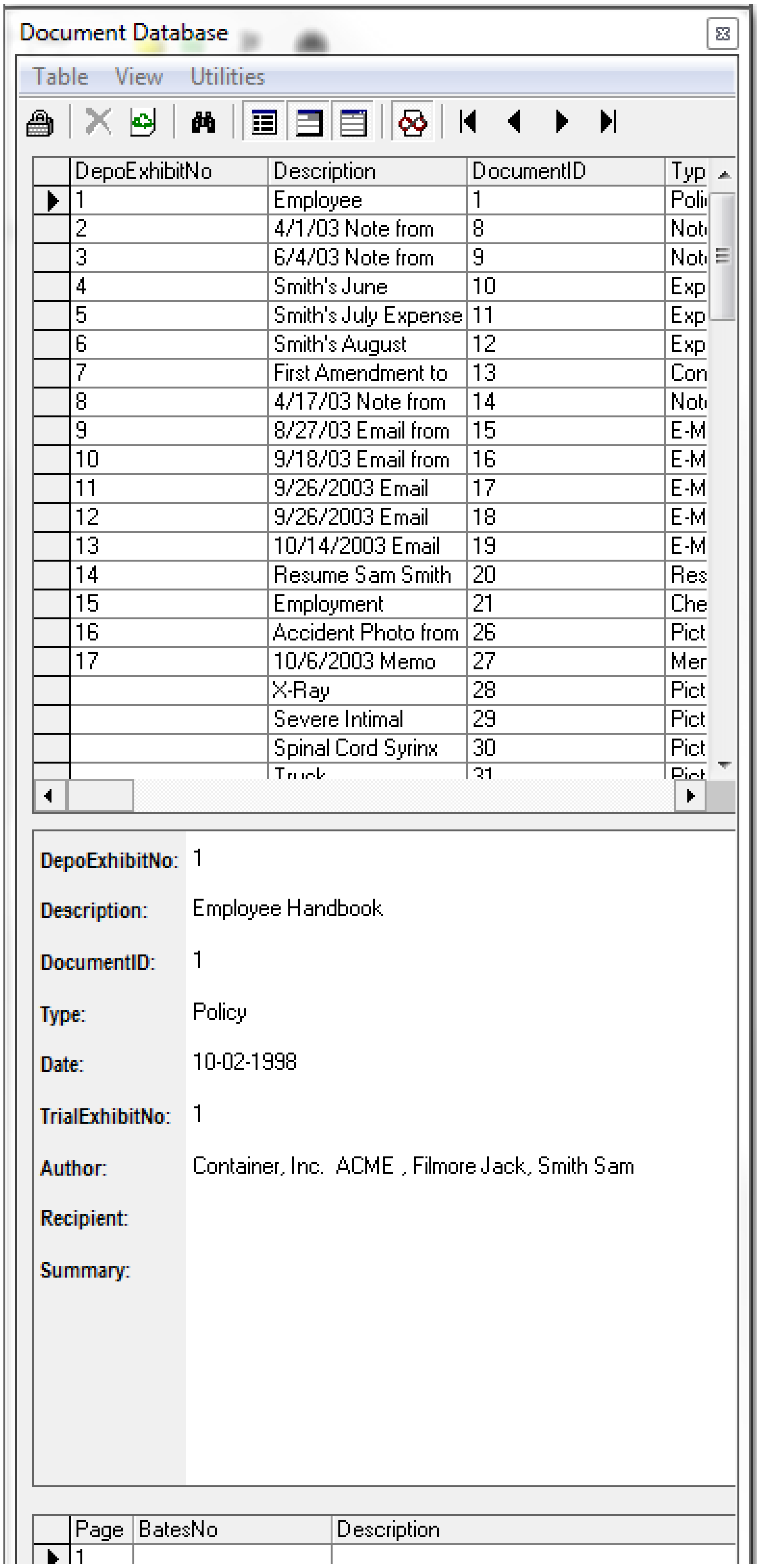
Rotate Selected Pages – Causes all of the selected document pages to be rotated whenever they are displayed. Similar to the ‘Save Image rotation property to database’ option on the Preferences window Images tab.

Document Database Window

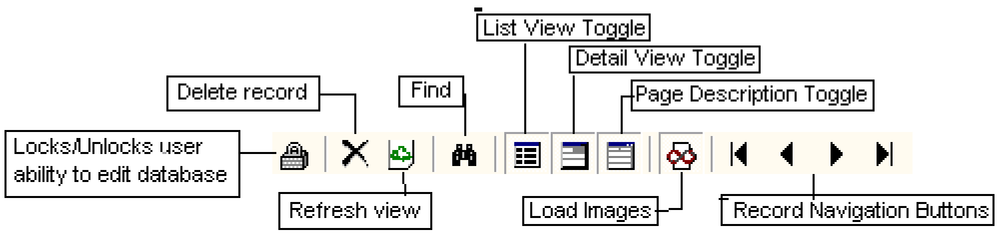
Table Menu   View Menu   Utilities Menu

Opening Document Database Window

The Document Database is opened by selecting the ‘DocDB’ tab on the Shortcut Bar or by selecting the ‘Document Database’ from the ‘View’ menu on the Main Window.


Document Database
Table View Utilities
DepoExhibitNo Description DocumentID Typ
1 Employee 1 Poli
2 4/1/03 Note from 8 Not
3 6/4/03 Note from 9 Not
4 Smith's June 10 Exp
5 Smith's July Expense 11 Exp
6 Smith's August 12 Exp
7 First Amendment to 13 Con
8 4/17/03 Note from 14 Not
9 8/27/03 Email from 15 E-M
10 9/18/03 Email from 16 E-M
11 9/26/2003 Email 17 E-M
12 9/26/2003 Email 18 E-M
13 10/14/2003 Email 19 E-M
14 Resume Sam Smith 20 Res
15 Employment 21 Che
16 Accident Photo from 26 Pict
17 10/6/2003 Memo 27 Mer
X-Ray 28 Pict
Severe Intimal 29 Pict
Spinal Cord Syrinx 30 Pict
DepoExhibitNo: 1
Description: Employee Handbook
DocumentID: 1
Type: Policy
Date: 10-02-1998
TrialExhibitNo: 1
Author: Container, Inc. ACME , Filmore Jack, Smith Sam
Recipient:
Summary:
Page BatesNo Description
1

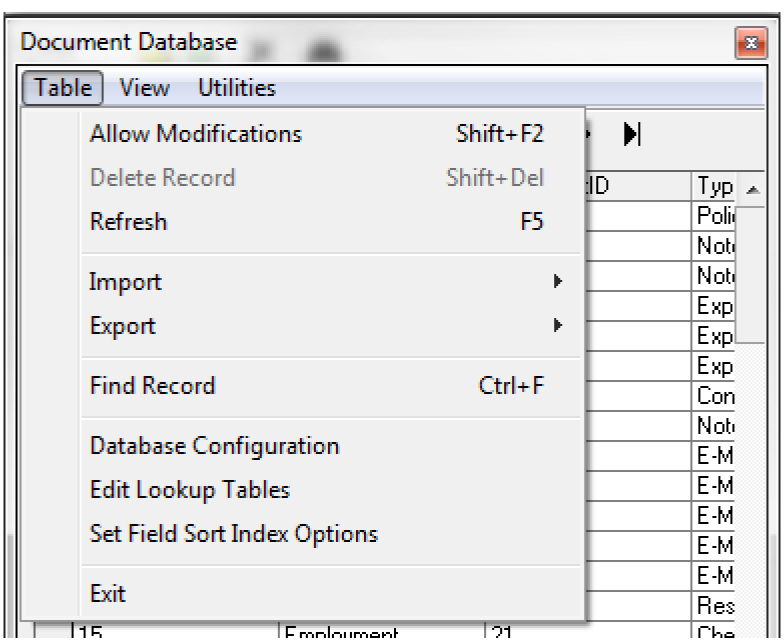
User Interface Tips



Here are a few quick points about the Document Database Window:

- The Document Database window can be configured to view records in list, detail, or list and detail views. See View Menu for more details.
- If the 'Autoload Images' option under the View Menu is checked, images will automatically be loaded as you move through the records.
- To edit records, you must first check the 'Allow Modifications' option on the 'Files' menu or press the lock on the toolbar.
- Click on the screen capture below to learn more about using the Document Database.

Table Menu

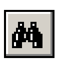


Allow Modifications – this menu option turns on/off the ability to alter the database.

Delete Record – This menu option is only enabled if ‘Allow Modifications’ is on. This will cause the currently selected record to be deleted from the database.

 Deleting a record will delete the actual image file.

Refresh – Refreshes the database view. This feature is sometimes needed to update the view to reflect data that was just imported or recent changes made by other users in a multi-user environment.



Find Record – This opens the ‘Find’ dialog box and allows you find records in the Document Database.

Import – This opens a file selection dialog and allows you to import document data contained in delimited ASCII files. See Importing Document Database Data below for more details.

Export – This opens a file selection dialog and allows you to export data out of the Document Database into a delimited ASCII file. See Exporting Document Database Data below for more details.

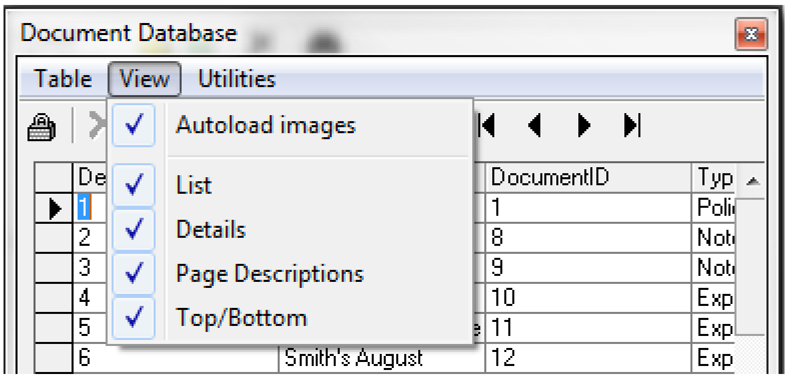
Database Configuration – Opens the Database Configuration window.

Edit Lookup Tables – Opens the Lookup Fields dialog for modifying the value list of the various lookup fields.

Set Field Index Sort Options – Opens the Field Index Sort Options dialog that controls how the DepoExhibitNo and TrialExhibitNo fields are sorted.

Exit – This closes the Document Database window.

Views Menu



Auto Load Images – Selecting this menu option will cause images to automatically be loaded as you move through the Document Database.

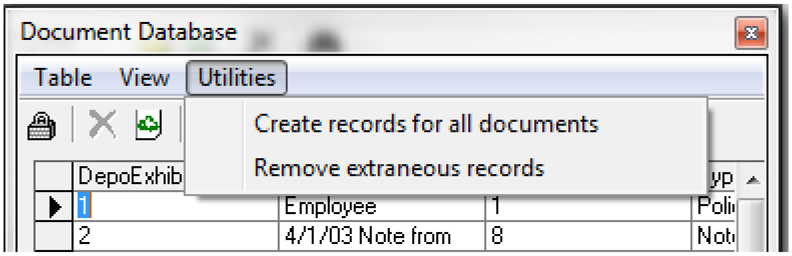
List View – List View shows all the database information in a grid – one record per row. This view is useful to view many records at the same time. However, fields containing lots of data will not be completely viewable.

Details View – Details View permits you to see all the data for one record. The fields will automatically resize to allow you to see all the data for each field.

Page Description View – Page Description View will cause part of the window to show the descriptions that have been associated with each page of a document.

Top/Bottom View – This option causes the record details to display below the database grid view, instead of to the right of the database grid view, when viewing the grid and details views at the same time.

Utilities Menu



Modify Database Structure – Selecting this menu item will open the Modify Database Structure dialog. This dialog permits you to add and remove fields from the database, define what fields are lookup fields, and define the order in which fields are displayed. See Database Configuration below.

Define Lookup Table Values – Selecting this menu item will display the Define Lookup Field Values dialog that allows you define the valid entries for fields defined as being ‘lookup fields’. See Define Lookup Field Values dialog below.

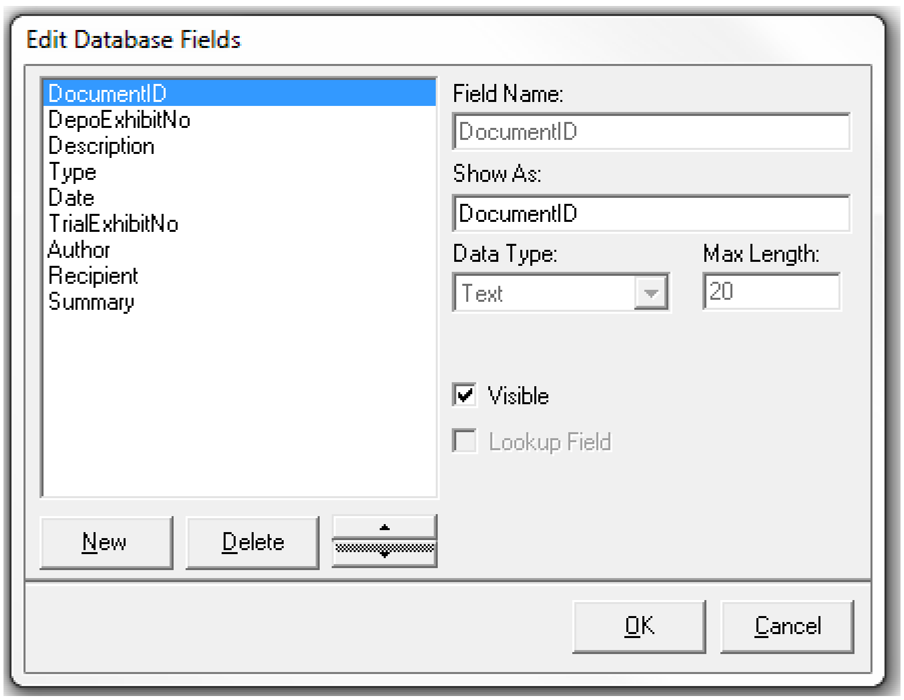
Create Records for all Documents – This utility will cause the program to look for documents defined in the Document Page Database that do not exist in the Document Database and add those records to the Document Database.

Remove Extraneous Records – This utility will delete records in the Document Database that do not have any corresponding record in the Document Page Database.

Database Configuration

Overview

To modify the structure of your Document Database, select ‘Modify Database Structure’ from the ‘Table’ menu on the Document Database window. The Database Configuration dialog allows you to create and delete fields from your database. It also allows you to define the order that fields will be displayed in both the List and Detail views on the Document Database window.



Although you can’t delete any of the required fields, you can hide them by unchecking the ‘Visible’ check box on the Document Database window.

Adding Fields

To add a field to the Document Database:

1. Select ‘Modify Database Structure’ from the ‘Table’ menu on the Document Database window. This will load the Database Configuration dialog. (See above)
2. Click the New button.

3. Enter the Name of the new field – note: No two fields may have the same name.
4. In the ‘Show As’ text box enter how you would like the new field name to be displayed in the column headings and details section of the Document Database window.
5. Select the type of data you wish to store in this field.

    a. If you selected Text data type, you can enter the maximum number of characters that are allowed in the field, up to 255.
    b. Memo data types can store textual data of any length.
    c. Number fields.

6. Allow Full Text Searching option checked causes the field data to be fully text searchable.
7. To make the new field invisible in the main document database table, uncheck the Visible option.
8. In those circumstances where you wish to limit the values that can be entered in a text field, you can select the Lookup Field option. When this option is selected, you also need to select the source of the lookup table. Your three options are:

    a. General Lookup – use this option if you want to define a list of valid entries independent of people or issue entries that are made in the Facts Database. You can create the list of valid entries for the field using the Define Lookup Field Values dialog.
    b. People Lookup – use this option if you want the valid list of entries to be limited to the list of people used by the Facts Database.
    c. Issue Lookup – use this option if you want the valid list of entries to be limited to the list of issues used by the Facts Database.

9. When all the options are correct, click the OK button to add the field to the database.

Removing Fields

To remove a non-required field (see below for list of Required Fields) from the document database:

1. Select ‘Modify Database Structure’ from the ‘Table’ menu on the Document Database window. This will load the Database Configuration dialog. (See above)
2. From the Utilities menu, select Edit Database Fields.
3. Select the field you wish to remove.

4. Click the Delete button.
5. You will be asked to confirm the removal of the field.

NOTE: All data will be permanently lost if a field is removed!

Required Fields

The following fields are required for Visionary to function properly and cannot be removed.

- Document ID
- DocumentIDLen*
- Description
- DepoExhibitNo
- DepoExhibitNoLen*
- TrialExhibitNo
- TrailExhibitNoLen*
- Type
- Date
- Author

- Summary

*Only visible from within MS Access

Changing Field Names

Visionary permits you to change the ‘Display As’ property of a field after it has been created. However, it does not permit you to change other field properties. To change the ‘Show As’ property:

1. Select ‘Database Configuration’ from the ‘Table’ menu on the Document Database window. This will load the Database Configuration dialog. (See above)
2. From the Utilities menu, select Database Configuration.
3. Select the field you wish to alter.
4. Specify the new display name in the Show As: textbox.
5. Check or uncheck the Visible option.
6. Click Ok to save your changes.

Changing Field Order

The order in which fields are displayed in the list and details view in the Document Database can be altered from the Database Configuration dialog. To change the field order of your fields:

1. Select ‘Database Configuration’ from the ‘Table’ menu on the Document Database window. This will load the Database Configuration dialog. (See above)
2. From the Utilities menu, select Database Configuration.
3. Select the field you wish to move up or down in the field order.
4. Press the up/down buttons to move the field.
5. Click ‘Ok’ to save your changes.

Lookup Fields

To add, remove, or edit data in the look-up tables:

1. From the Utilities menu of the Document Database window, select Edit Look-up Tables.
2. The Look-up Table dialog will appear.
   {DocDB_{bmct DocDB_editlookup.bmp}
3. The Issues and People tables from the Facts Database are included, as well as Document Types and any user-defined fields, which are set for General Look-up.
4. To add a record to the current table, click the New button. A new record will be added, and you can edit the data within that record.
5. To remove a record from the Look-up table, select the record using the record selector on the left of the table and click the Delete button.
   NOTE: Any changes made to the Issues or People table will also be reflected in the Facts DB tables!
6. To edit an existing record, place the mouse cursor in the field you wish to edit and type in the new value.
7. When you have finished making changes, click the OK button.

Synchronizing Document Database with Document Page Database

By default, empty records will automatically be created in the Document Database whenever records are placed in the Document Page Database. However, it is possible for documents to only be referenced in the Document Page Database.

To create a record in the Document Database for every document referenced in the Document Page Database:

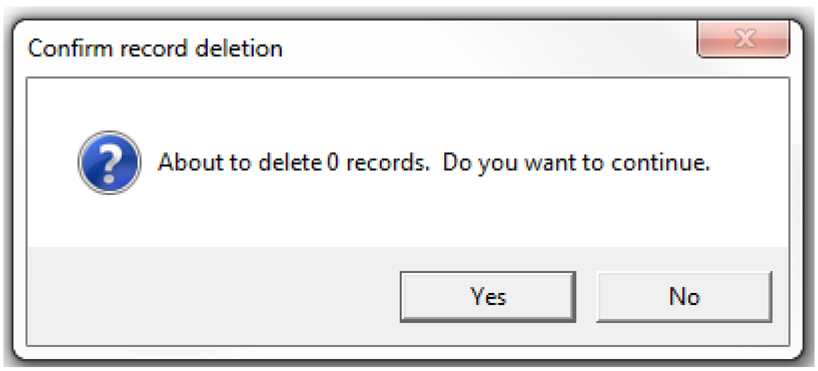
1. Open the Document Database window.
2. Select the ‘Utilities\Tools\Create records for all documents’ menu item.

Removing Extraneous Records

It is possible for the Document Database to contain extraneous references to images or documents that are no longer contained in the Document Page Database. Most often this occurs when records are removed from the Document Page Database and results in a ‘Cannot locate image page reference in database’ message being displayed in the image window.

To remove the extraneous records in the Document Database:

1. Open the Document Database window.
2. Select the ‘Utilities\Remove extraneous records’ menu item on the Document Database window.
3. If there are extraneous records then you will be presented with a confirmation message that warns you how many records will be removed if you continue. Press the ‘Yes’ button to remove all of the extraneous records.

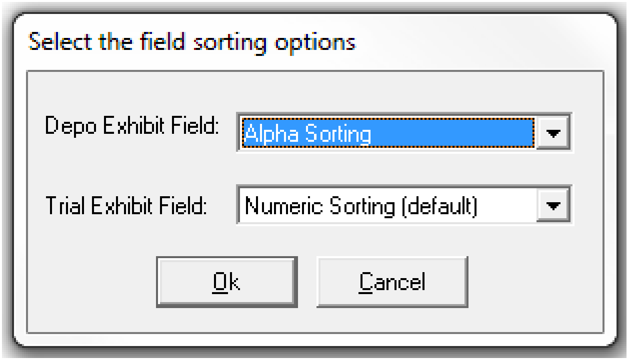


Select Field Sort Options

By default, Visionary will sort the DocumentID, ImageID, DepoExhibitNo, and TrialExhibitNo fields numerically as opposed to alphabetically.

To modify the sorting algorithm used for any given field:

1. Select the ‘Table\Set field index sort options’ menu item on the Document Database window.
2. Select the desired sort type for each of the fields listed.



Merging Documents

Note: The merging functionality in Visionary is limited to merging two documents that are listed consequitively in the database. This feature is primarily intended to address situations where documents were scanned in the proper order but were not properly broken at the document level.

To merge two documents into a single document:

1. Open the Document Page Database window by selecting the ‘View / Document Page Database’ menu item on the main window.
2. Turn on ‘Allow Modifications’ by selecting the ‘Table / Allow Modifications menu item or pressing the Lock button on the toolbar.
3. Select the first page of the document immediately after the document that you want to merge it with.
4. Select the ‘Utilities / Merge Documents’ menu item.
5. Press ‘Ok’ to the merge confirmation box.

Splitting Documents

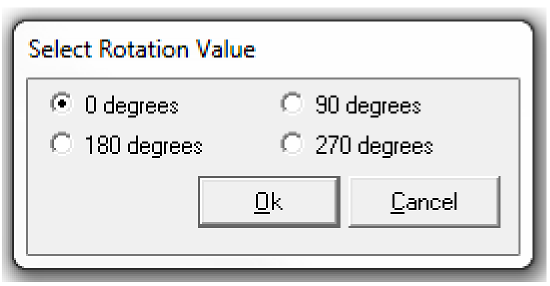
To split one document into two documents:

1. Open the Document Page Database window by selecting the ‘View / Document Page Database’ menu item on the main window.
2. Turn on ‘Allow Modifications’ by selecting the ‘Table / Allow Modifications menu item or pressing the Lock button on the toolbar.
3. Select page of where the new document should start.
4. Select the ‘Utilities / Split Documents menu item.
5. Press ‘Ok’ on the split document confirmation box.

Rotating Selected Image Records

To rotate a selected group of images from the Document Page Database:

1. Open the Document Page Database window by selecting the ‘View / Document Page Database’ menu item on the main window.
2. Turn on ‘Allow Modifications’ by selecting the ‘Table / Allow Modifications menu item or pressing the Lock button on the toolbar.
3. Select the image record(s) to be rotated.
4. Select the ‘Utilities / Rotate Selected Pages’ menu item.
5. Select the degree to which the images should be rotated.



Press ‘Ok’.

Importing Image & Document Files

Visionary can import images and other files that can be displayed in Internet Explorer by selecting those files one at a time or in groups.

Tip: If you have hundreds or thousands of images to import or if you are importing images that were scanned by a service bureau, use an Image Load File to import your images. This will save you considerable time and will simplify the process of consolidating the documents properly when they have been scanned as single page files. All reputable scanning vendors and popular legal scanning software such as IPRO™ and LAW™ can create image load files.

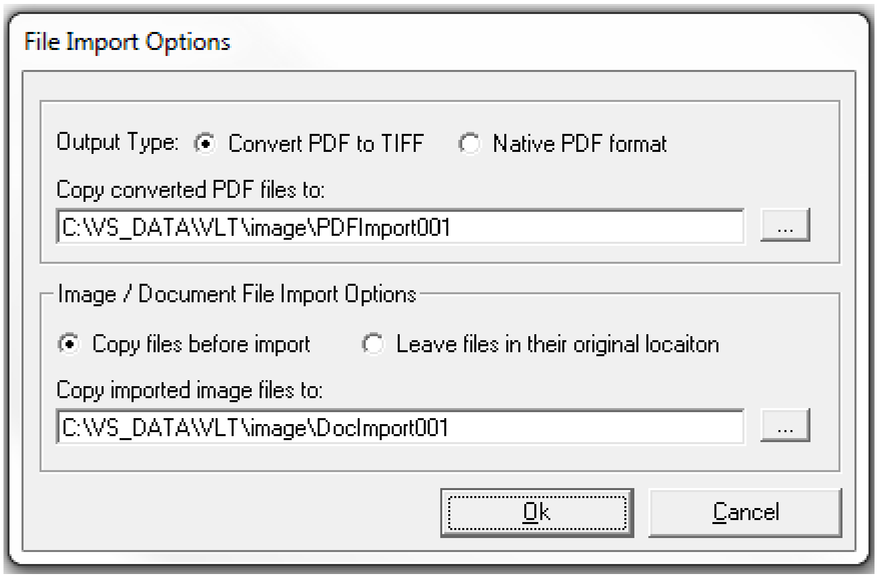
To import an image or document file into Visionary:

1. Select either the ‘File/Import/Image/Document Files (Advanced)’ or ‘File/Import/Image/Document Folders (Advanced)’ menu item from the main window.

2. Select the files or image folder that you want to import.

Note: If you select a folder to import that only has other folders within it, Visionary will import all the files within the image folder.

3. Select the desired import options.

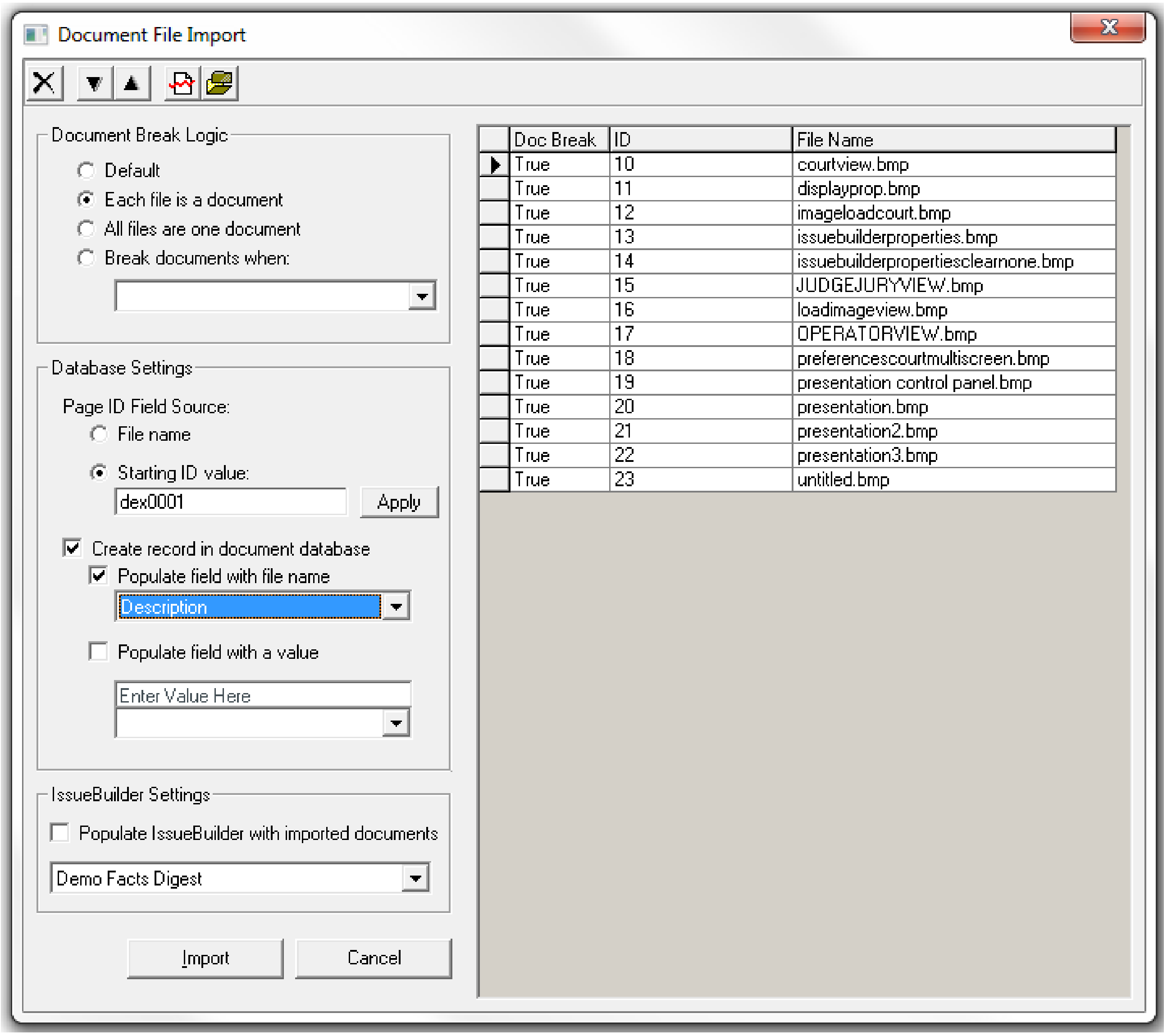


PDF Import Options (Professional Edition) – Determines whether or not PDF files will be converted to TIFF format before being imported and where the TIFF files will be copied.

Image / Document File Import Options – Determines whether or not files will be copied to the specified folder before being added to Visionary's databases.

 It is generally preferable to convert PDF files to TIFF because TIFF files can be annotated, zoomed, and recalled at the page level rather than the document level. TIFF files also load faster than PDF files, which can be a benefit in trial and presentation settings.

4. In the Document File Import window, select the desired import options and confirm that the document breaks (denoted by the icon in the leftmost column) are correct.



Document Break Logic – Determines how the files will be broken at the page level. If the file selection includes any multipage files, then only the 'Each file is a document' option is enabled.

Database Settings – indicates how the document ID field should be derived and what, if any, database information should be written to the document database.

IssueBuilder Settings – Indicates if the group of imported images should be added to an IssueBuilder.

5. Click the 'Import' button.
6. Upon completion, the files have been imported window will appear. Click the 'OK' button to return to the Document Imported window for further imports.

When importing files, take the time to develop a file naming and directory naming system. Prepare for a time when you'll want to copy all the case files onto another computer or drive (as is common when you go to court). Store all the case files under a single directory so it's to easy find all the applicable files. Also, avoid placing files on your desktop or the 'My Documents' folder. Documents placed in these locations may not be accessible when logged into your computer as a different user.

Importing Image Load Files

To import an Image Load File:

1. Select the 'File/Import/Image Load File' from the main window (or from the Document Database window).
2. In the 'Files of type' field, select the file type to be imported.

Visionary supports importing the following Image Load File formats:

Visionary Image Load Files (.VIF)

Opticon

Summation DII

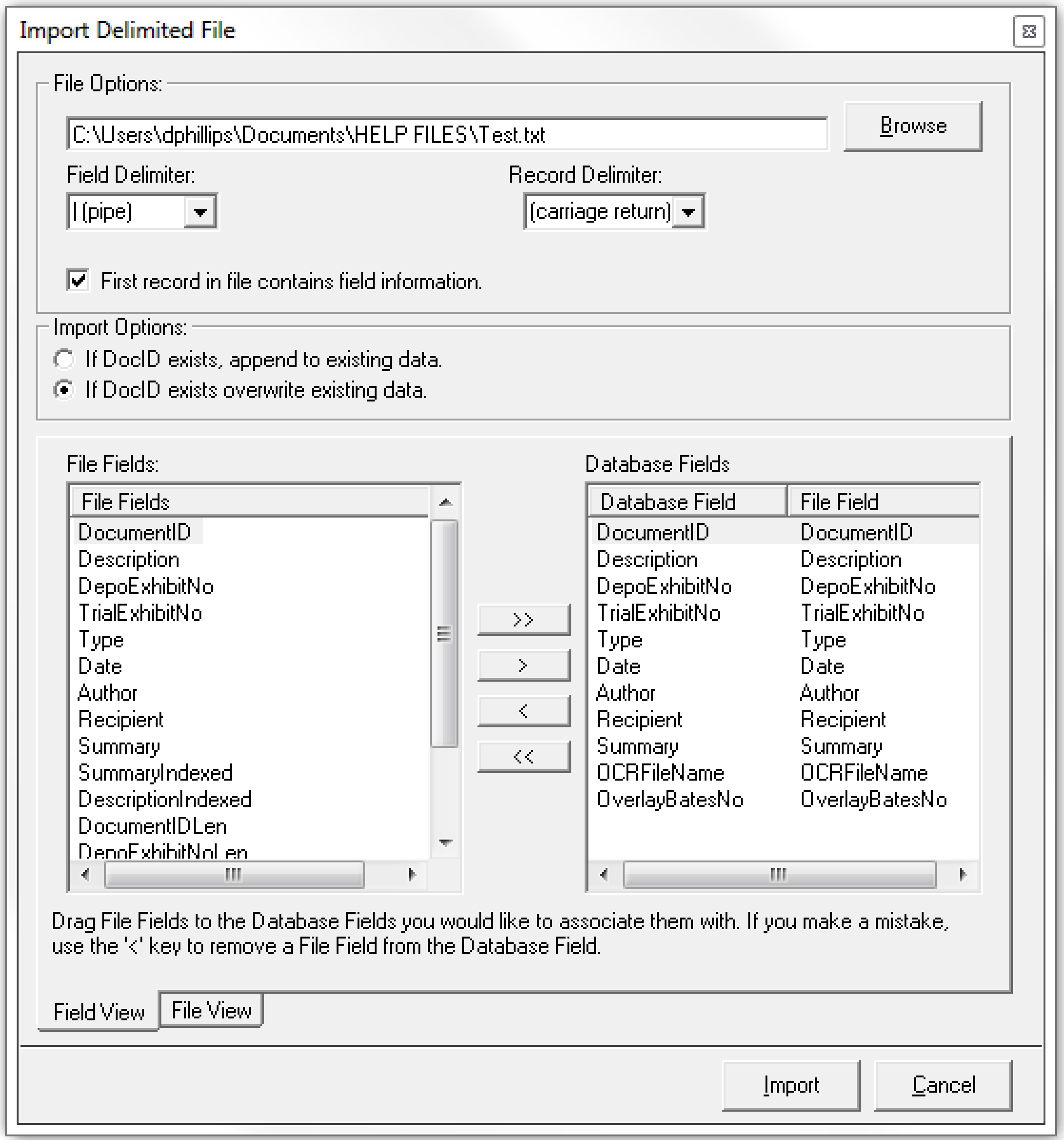
3. Select the file to be imported.
4. Click the 'Open' button to start the import process.
5. During the import process, a moving progress bar will display the status of the image load file.
6. Upon completion, a Load File Import Successful window will be displayed, click 'Ok".

See Also: Importing Database Load Files

Importing Database Load Files

To import a Database Load File:

1. Select the 'File/Import/Database Load File' menu item from the main window.
2. Select the file to be imported.
3. Click the 'Open" button to start the import process.
4. Select the appropriate File and Import options.



Field Delimiter – Identifies the ASCII character used to delimit fields.

Record Delimiter – Identifies the ASCII character used to delimit records.

Import Options – Select to either overwrite or append to existing data. (Note: Data is only appended for text fields when the 'Append' option is selected. Data in other field types is always replaced.)

5. Associate the fields identified in the source file with those present in the Document Database by either: (a) selecting and dragging a File Fields entry to the corresponding Database Field entry or (b) select a File Field and a Database Field and clicking the '>' button to associate the two.

Note: The source file must contain and you must associate a DocumentID field (sometimes referred to as BatesNo or BegNum). This field is required because it is what binds the field data to the actual image.

6. File View Tab.

Modify File data – You can replace various ASCII characters using the Find and Replace process. This could be used to replace incorrect characters with correct characters. It can be executed multiple times. Enter the character to find in the Find field and the character to be the replacement in the Replace field.

7. Press the ‘Import’ button.
8. Upon completion, a File has been imported. The imported window will be displayed, click ‘Ok".

See Also: Importing Image Load Files

Supported Database Load File Formats

Opticon Format

The Opticon Image Load File format is a simple comma delimited file format made popular by Concordance™. Opticon files take the following form:

[PageID],[Drive Label],[Image File Path and Name], [Document Break Flag], [Folder Break Flag], [Box Break Flag], [Page No]

Sample Opticon Load File: (Also found in the ‘Sample Data’ folder on the Visionary install CD.)

```
233,VDEMO, C:\IMAGE\VISI01\VIS33.TIF,Y,,

234,VDEMO, C:\IMAGE\VISI01\VIS33.TIF,,,

235,VDEMO, C:\IMAGE\VISI01\VIS35.TIF,Y,,

236,VDEMO, C:\IMAGE\VISI01\VIS35.TIF,,,

237,VDEMO, C:\IMAGE\VISI01\VIS35.TIF,,,
```

Important Notes:

- The pageID field must be unique for every image in a case. IssueBuilders use this field as a key to identify what images to display.
- Concordance can work with load files that have a unique PageID for each document. This is fine for Concordance because it has one record for each document. However, Visionary makes references to pages within documents so it requires that these values be unique.
- Visionary does not make use of any drive letter references to the file path. Instead, it makes use of the File Location value to identify the drive or network share to use loading an image file.
- The Folder Break, Box Break, and Page Number fields are optional, though the trailing commas should be retained.

Visionary Image Load File Format

The Visionary Image Load File format (.VIF) is an Image Load File and Document Database Load File combined into a single file that extends the Opticon format to include Document Database fields for document descriptions, page descriptions, document types, deposition exhibit references, and trial exhibit references.

Summation DII

The Summation DII format is a rich, but complex format used by Summation. Visionary can use this format as an Image Load File for the Visionary Document Page Database. A sample DII file is contained in the Sample Data folder on the Visionary installation CD.

Modifying Document Database Records

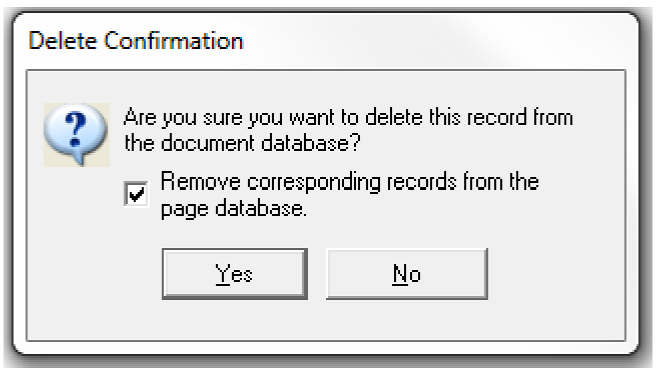
To modify a record in the Document Database:

1. Select the ‘Table \ Allow Modifications’ menu item or press the icon on the toolbar.
2. Make sure that the details view is visible. (See Views Menu)
3. Select the record to be modified.
4. Click on the field to be modified and enter or remove text as needed.

Delete Records

To delete a record in the Document Database:

1. Select the ‘Table \ Allow Modifications’ menu item or press the icon on the toolbar.
2. Select the record to be removed.
3. Select the ‘Table \ Delete Record’ menu item or press the icon on the toolbar.
4. Select whether or not the related records in the Document Page Database should also be removed. If you elected to NOT Remove corresponding records from the page database, then you will still be able to view the document when moving through the document population or by doing PageID searches. See the Document Database vs. Document Page Database topic for more information about the difference between the Document and Document Page database.

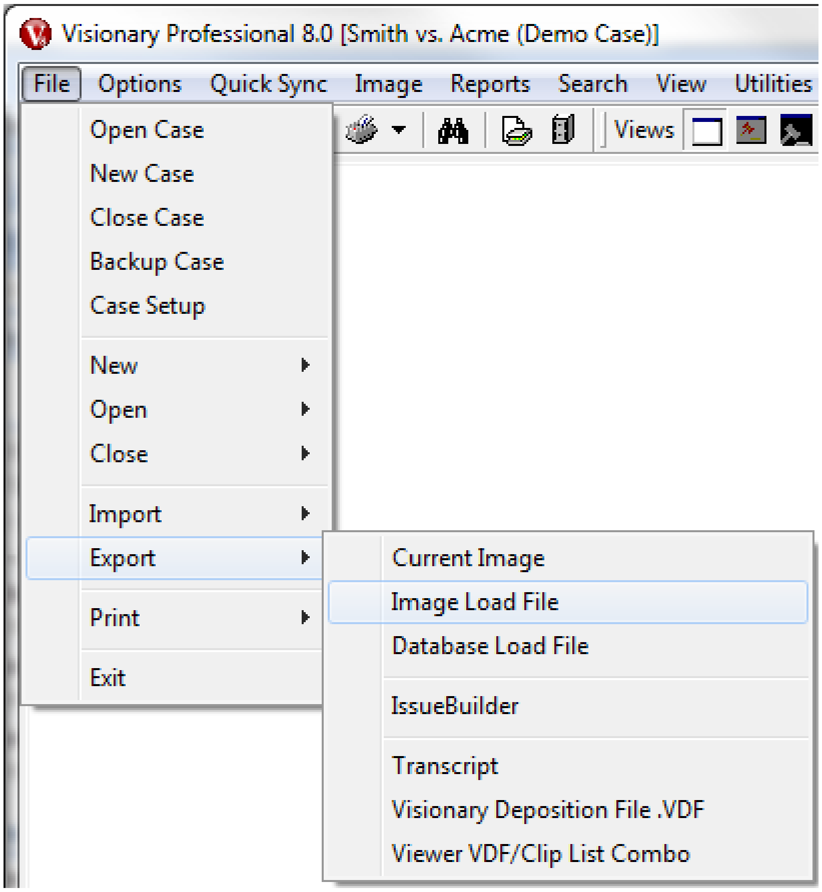


5. Press the ‘Yes’ button.

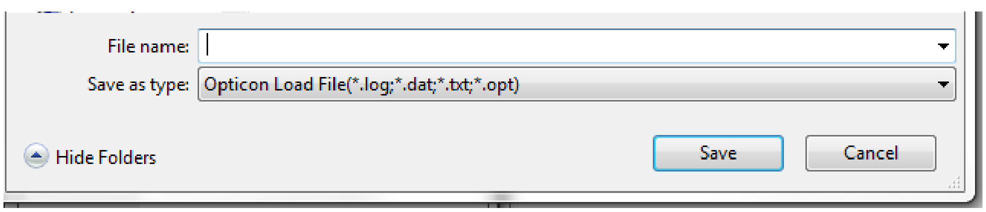
Exporting Image Load Files

To export or create an Image Load File from a Visionary database:

1. Select the ‘File/Export/Image Load File’ menu item from the main screen.



2. Enter a file name.
3. Select the type of exported load file to be created from the ‘Save as type’ drop down list.

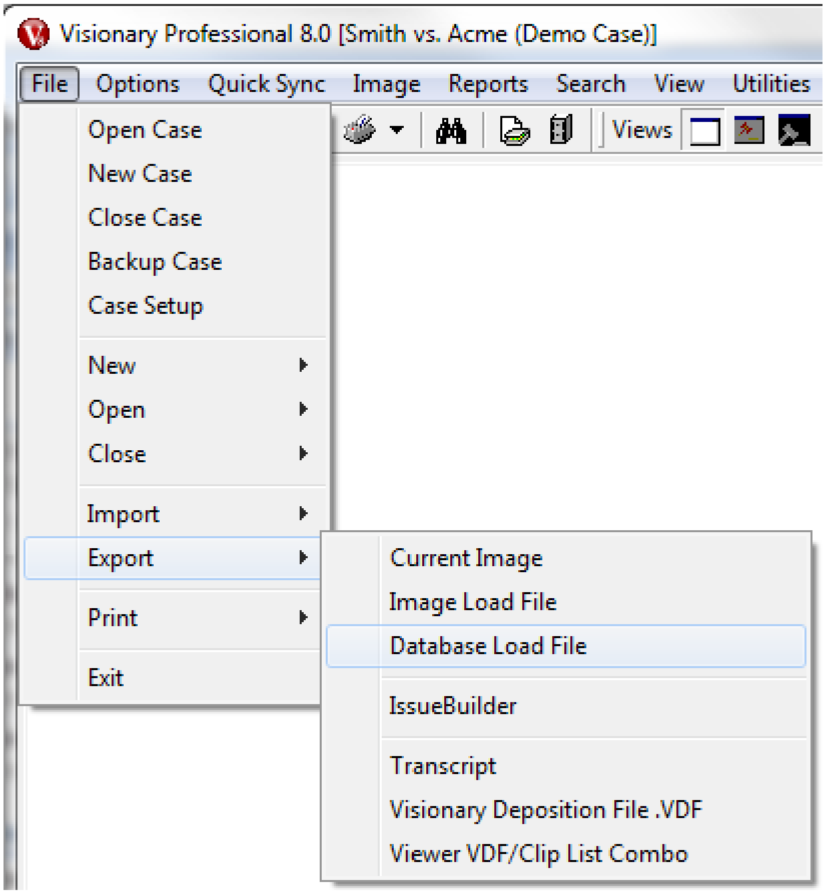


4. Click ‘Save’.

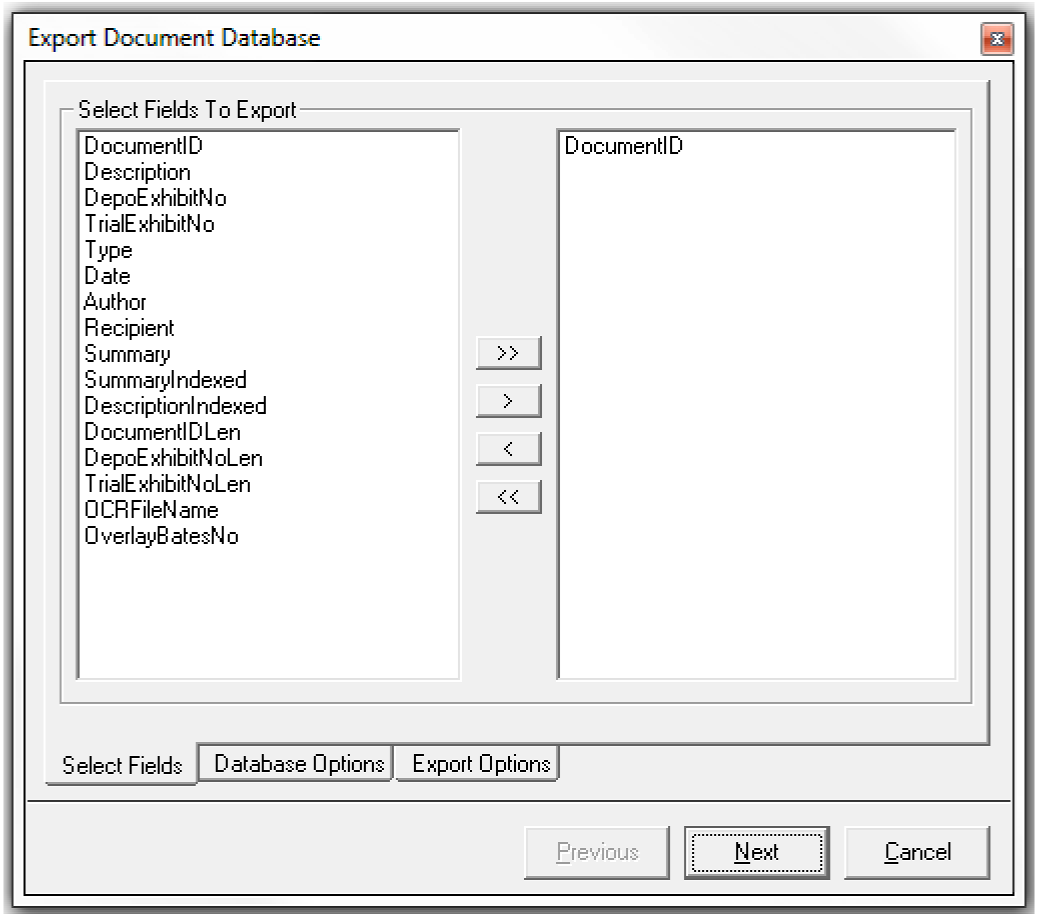
Exporting Database Load Files

To export or create a Database Load File from a Visionary database:

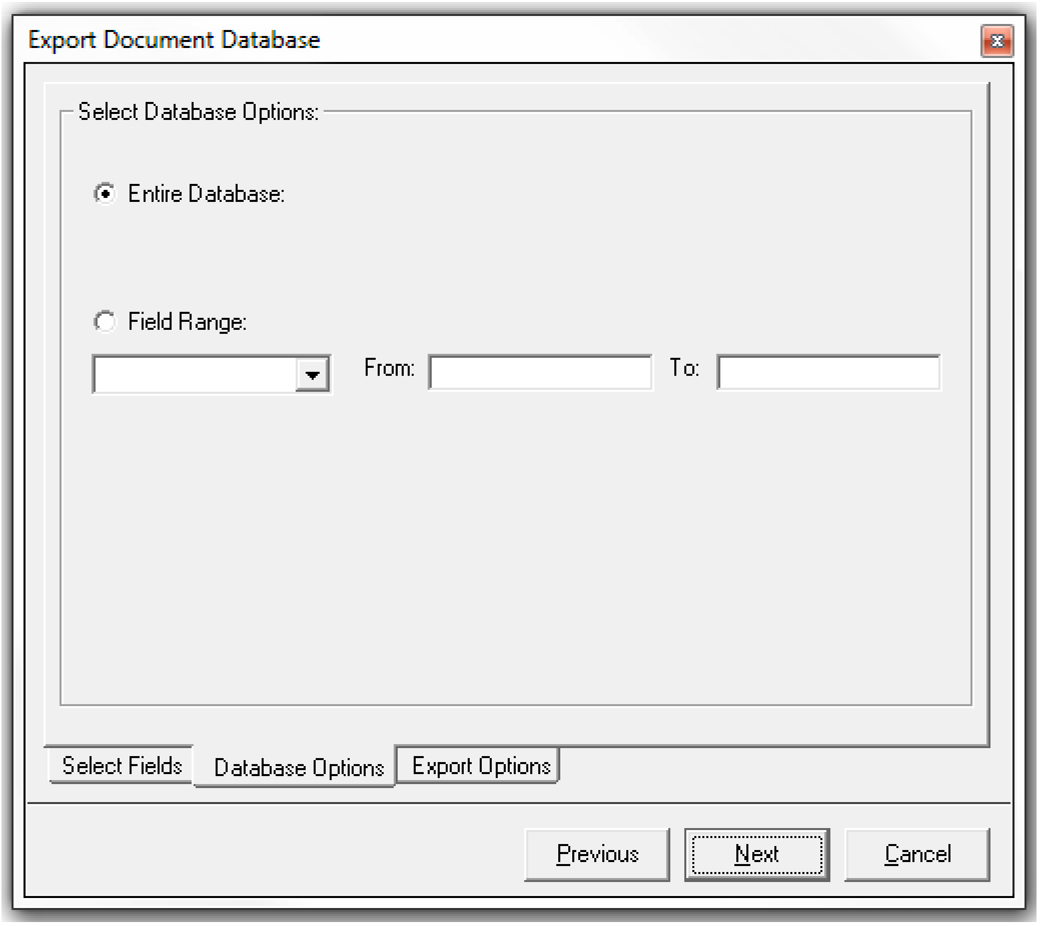
1. Select the ‘File/Export/Database Load File’ menu item from the main screen.



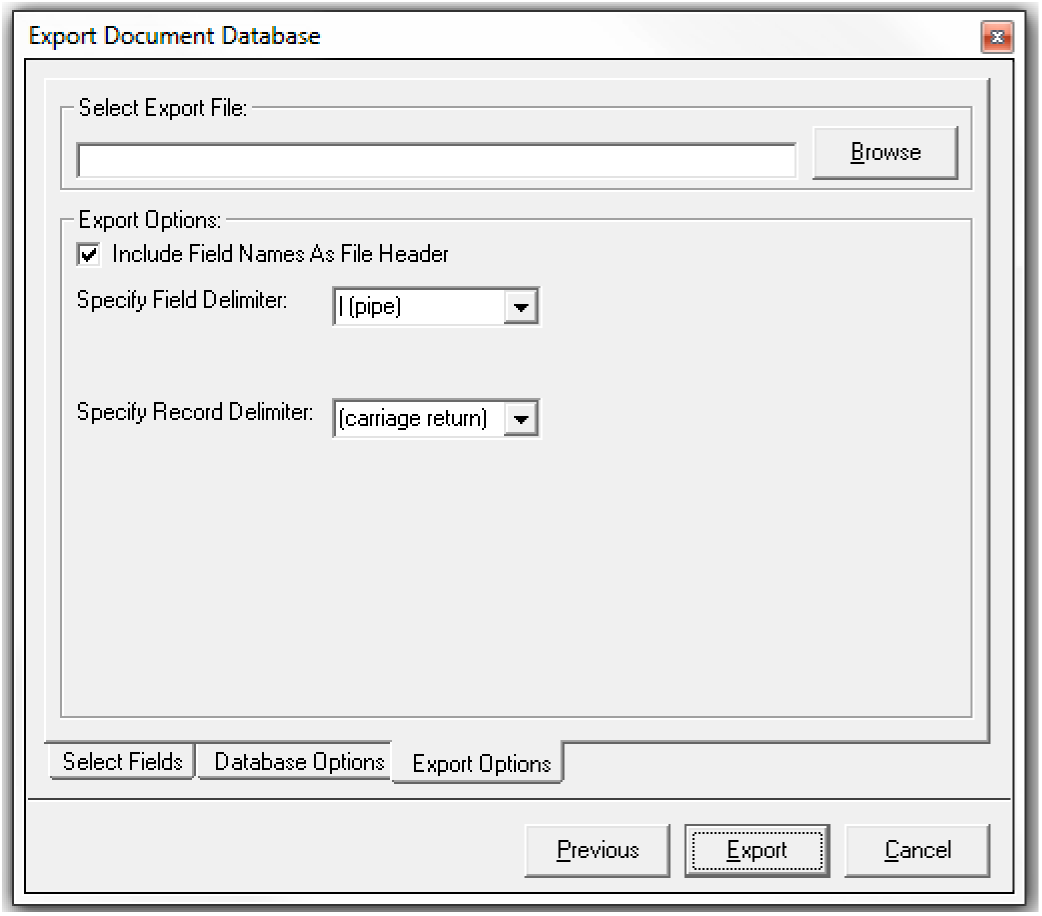
2. Select the individual fields to be exported and then press the ‘>’ button to move these fields into the output list. Then click the ‘Next’ button.



3. Select the range of documents to be exported.



4. Select the output file and set the other export options.



Include Field Names as First Record – Field names will be listed as the first record in the export file.

Specify Field Delimiter – Indicate the ASCII character to be used as the field delimiter.

Specify Record Delimiter – Indicate the ASCII character to be used as the record delimiter.

5. Click the 'Export' button.
6. Upon completion the Database Load File Export window opens. Click the 'Ok" button to finish the process.

Tip: Under most circumstances, be sure to include the DocumentID in all Database Load Files.

Image Volume Redirector

Overview

The Image Volume enables all the image files associated with the same file location (often the CD Volume value in load files) to be redirected to a new drive and path location. This is very useful when images are imported from Load Files that point to a CD, but the images are copied onto a local or network hard drive. It is also useful when copying data to laptops with different volume names.

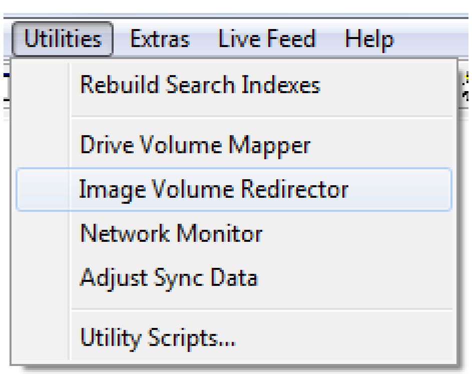
Example of When to use the Image Volume Redirector

Understanding how the Image Volume Redirector works can best be understood by example. Let's assume that you receive a CD whose Volume Label is 'CD001'. The CD contains a Load File that is valid for pulling the image files from the CD and you use this file to import the images into your case. At this point, Visionary can display any of your images as long as the CD is loaded in your CD-ROM drive. Next, copy all of the images into a folder named 'c:\CaseId\images\cd001' and remove the CD. The images will no longer display. To remedy the problem, you add an entry to the Image Volume Redirector. Basically, you tell the redirector that whenever a request is made for any file that resides on 'CD001' to go to 'DRIVE_C' instead and add 'c:\CaseId\images\cd001' to the beginning of whatever path is referenced in the database.

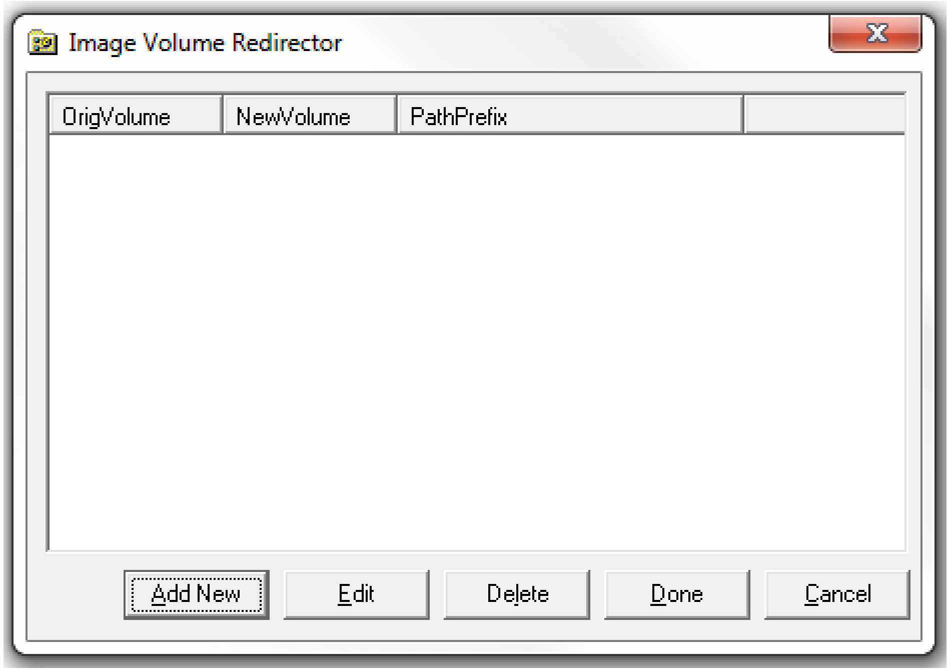
Adding Redirection Entries

To add entries to the Image Volume Redirector:

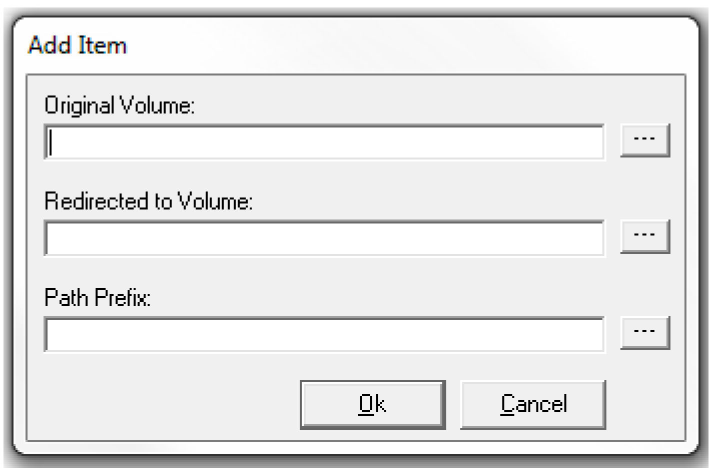
1. Select the 'Utilities\Image Volume Redirector' menu item on the main window.



2. Press the 'Add' button on the Image Volume Redirector dialog.



3. In the ‘Add’ dialog, identify the original and new drive volumes.



Original Volume – The drive volume or network share location is referenced in the Document Page Database .

Redirected Volume – The drive volume or network share location that should be used in place of the Original Volume.

Path Prefix – The path that should be added to the beginning of the path and file name identified in the File Name field of the Document Page Database.

4. Press ‘Ok’ to save the entry.
5. Press the ‘Done’ button to save your changes.

Modifying Redirection Entries

To modify entries in the Image Volume Redirector:

1. Select the ‘Utilities\Image Volume Redirector’ menu item on the main window.
2. Select the entry to be edited, press the ‘Edit’ button.
3. Modify the properties as required.
4. Press the ‘Done’ button to save your changes.

Deleting Redirection Entries

To delete an Image Volume Redirector entry:

1. Select the ‘Utilities\Image Volume Redirector’ menu item on the main window.
2. Press the ‘Delete’ button.
3. Press the ‘Done’ button to save your changes.

Viewing & Saving Internet Content

Web Browser Window

Microsoft's Internet Explorer technology is integrated into Visionary's Web Browser Window. Using this window, users can display anything inside of Visionary that can be displayed in Internet Explorer – including Word, Excel, Power Point, and PDF files when the appropriate controls have been installed on a computer. Items displayed in Visionary's browser may also be added to Visionary's document database and added to IssueBuilders.

Move backward in browse sequence

Move forward in browse sequence

Stop loading page

Refresh page

Browse for file
Load current file or web address

See the following topics for more information on using Visionary's web browser:

Opening the Browser Window

Adding Web Pages & Documents to Document Database

Adding to IssueBuilders

Internet Preferences

Opening the Browser Window

To open the Internet browser window:

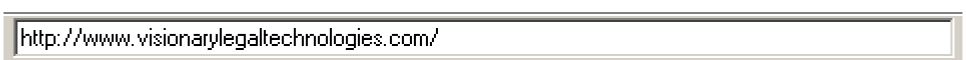
Click on the Internet Browser icon located on the main windows toolbar.

or

Select the 'View / Internet Window' menu item on the main window.

To view a web page or file:

Enter a path or URL into the address text box at the top of the web page



or

Open a file using the 'Open File' icon or select the 'File / Open Local File' menu option and then select a file in the Open File dialog box.

Adding Web Pages & Documents to Document Database

Files and web pages viewed in the Web Browser window can be saved and added to the document database for retrieval at a later time.

To add an Internet item to the Document database:

1. Open a web page or document in Visionary's web browser window.
2. In the Internet window, select File->Add to Document Page database if the item is not included in an IssueBuilder

or

Use the drag icon at the bottom of the page to copy an item to an IssueBuilder – this causes the Internet item to be added to the database and then to the IssueBuilder.

Note: Web pages that contain HTML frames that load other pages or reference image files that reside outside of the HTML page will not be saved with the main page.

Scanning New Documents

Overview

Note: This feature is only available in the Professional Edition.

Visionary provides the scanning capabilities through a TWAIN interface that are perfect for adding small numbers of documents to a case using a personal scanner. Visionary allows you to quality check and perform basic data coding to allow you to quickly locate and begin using your scanned documents.

Note: You must install the TWAIN driver that came with your scanner before using Visionary's scanning features. Visionary does not support Pixel or Isys scan drivers.

See Also:Scanning Documents

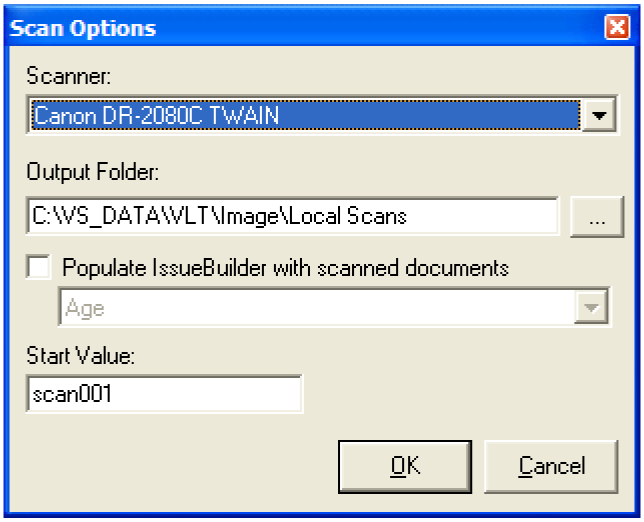
Scanning Documents

There are three steps to scanning new documents into Visionary. They are:

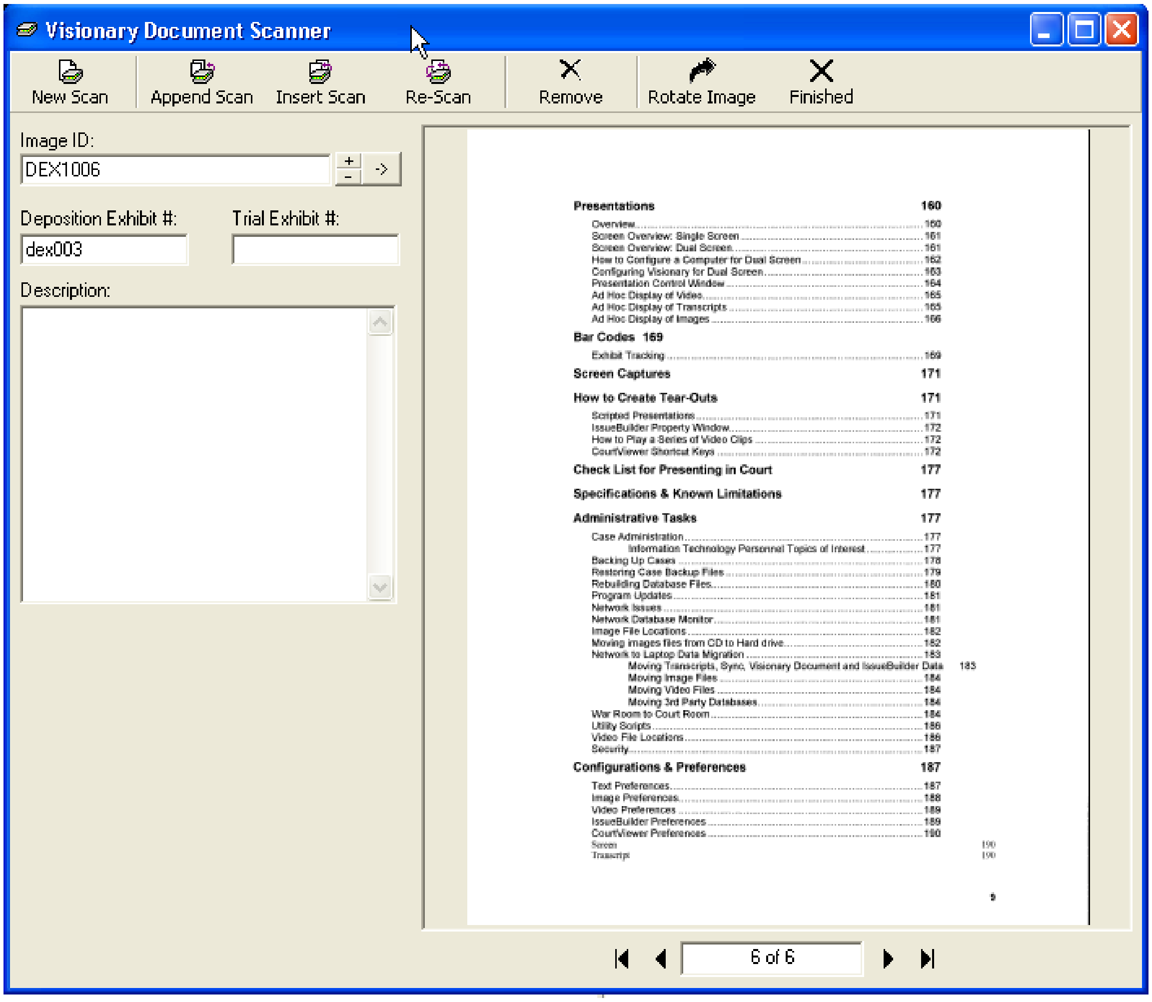
1. Scan.
2. Quality-check the scanned pages to ensure that no pages were missed (i.e. double fed through the scanner) and that they can be read.
3. Complete the database entries as appropriate.

To scan a new document:

1. Select the '\File\Import\Scan Document' menu item on the Main Window.
2. Select the scanner, output folder, optional IssueBuilder to append images to, and the ImageID/file name naming convention to be used.



3. Set whatever parameters are appropriate and available via your TWAIN scanner interface. Note: This interface will vary with scanner manufacturer and TWAIN driver versions. You will have to refer to the user manual for your scanner for an explanation on how to configure your scanner using the TWAIN scan interface.
4. After you scan a page, you can code some of the basic database fields, rotate pages, remove pages, add additional pages, or replace an existing page before moving the newly scanned pages into the Document Database.



To Quality-check newly scanned documents:

Once your document has been scanned, you should confirm that each page has scanned properly. If needed, you can use the ‘Append Scan’, ‘Insert Scan’, and ‘Re-Scan’ buttons to add additional pages or replace bad ones. If needed, you can also rotate pages.

To code your document:

Type information into the four text fields that are to the left of the scanned document.

- This step is not required, but it can make it easier to locate your documents once you close out of the scan module.
- If left alone, the Image ID field will automatically be filled in using the format specified when you first select the ‘Scan’ menu item.

- Documents are saved to the database when the ‘Close’ or ‘New Scan’ buttons are pressed.

Image Views

Overview

Image Views provide users the ability to associate an unlimited number of named views with any image. An image view describes the rotation, zoom, tear-out, position, and annotation settings that should be used to display an image. Image Views work almost the same as image IssueBuilder items except that the list of available views is loaded as an image is loaded rather than when an IssueBuilder is loaded. Image Views provide the same "pre-treat" benefit as IssueBuilders, but with added flexibility that makes it easy to use the pre-treats when images are called up in an ad-hoc fashion during a presentation. In presentation mode, Image Views can be displayed using the Image Views window when in dual-screen mode or using short cut keys.

For further information on using Image Views, please refer to the following topics:

Adding New Image Views

Deleting Image Views

Displaying Image Views In Workbench Screen

Displaying Image Views In CourtViewer Screen

Image Views Window

Image Views Window

The Image Views window is used to manage views associated with an image. This list changes on a page-by-page basis as you scroll between or within documents. The Image Views window is displayed by selecting the ‘Views / View Image Views’ menu item on the main window.

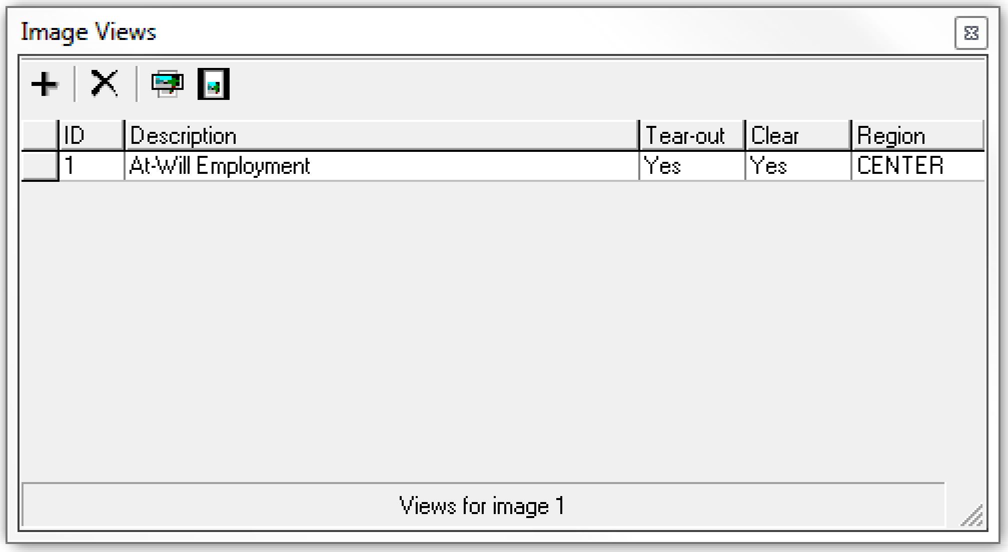


Table Field (Column) Meanings

ID Field – Numeric view ID that can be used to recall a view using shortcut keys in Court-Viewer Mode.

Description Field – User definable description for the field.

Tear-out Field – If ‘Yes’ view is identified as a tear-out view and the full screen version of the image will remain on the screen when view is displayed.

Clear Field – If set to ‘Yes’, then all other tear-out windows will be cleared before view is displayed.

Region Field – Specifies where an image should be loaded on the screen.

Toolbar Explanation

 - Create a new view (image zoom, rotation and annotation settings) for the currently image on the main window.

 - Delete the currently selected image view.

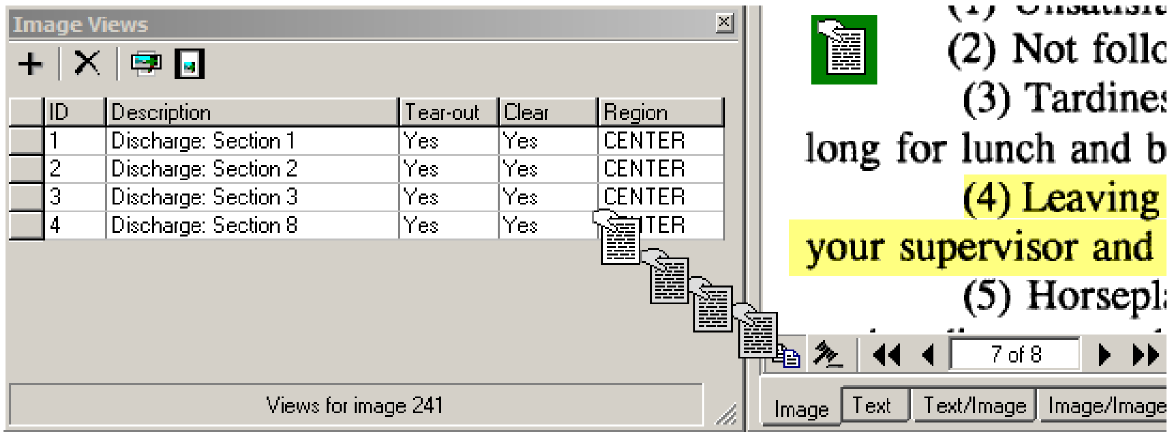
 - Show the currently selected image view. (Will load the ‘parent’ image if the view is defined as a ‘tear-out’)

 - Show the current image full screen.

Adding New Image Views

To add a new Image View using drag drop:

1. Load the image views window by selecting the ‘Views / View Image Views’ menu item on the main window.
2. Load an image. (See Navigating Through Images topic.) Zoom and annotate the view that you want to save.
3. Drag the drag icon below the image onto the Image Views window.



4. Alter the Image Views Description and other fields as desired. See the Image Views Window topic for further details.

To add a new Image View using the toolbar:

1. Load the image views window by selecting the ‘Views / View Image Views’ menu item on the main window.
2. Load an image.
3. Zoom and annotate the view that you want to save.
4. Press the ‘Add’ icon  on the Image Views window toolbar.
5. Alter the Image Views Description and other fields as desired. See the Image Views Window topic for further details.

Deleting Image Views

To delete an Image View:

1. Load the image views window by selecting the ‘Views / View Image Views’ menu item on the main window.

2. Select the view to be removed.
3. Press the ‘Delete’ icon. 

Displaying Image Views In CourtViewer

Display Using Image Views Window   Display Using Shortcut Keys

Image Views can be displayed in Visionary’s presentation window using the Image Views window or shortcut keys.

To display Image Views in the CourtViewer presentation screen using the Image Views window (the preferred method):

1. Make sure that Visionary is configured for dual screen presentation. See Configuring Visionary for Dual Screen.
2. Put Visionary into CourtViewer Mode.
3. Load in image into the CourtViewer screen for which image views exist. See Ad Hoc Display of Images.
4. Double click on the view that you want to display.

To display Image Views in the CourtViewer presentation screen using key stroke:

1. Put Visionary into CourtViewer mode.
2. Load an image into the CourtViewer screen for which there are image views.
3. Make sure that the CourtViewer screen has focus by clicking on it.
4. Enter ‘- -‘ (dash, dash) and then the view ID that you wish to load (see the ID column values in the Image Views window) and then press the ‘Enter’ key. (See the CourtViewer Shortcut Keys topic.)

Displaying Image Views In Main Window

To display an Image View on the work bench screen:

1. Load the image views window by selecting the ‘Views / View Image Views’ menu item on the main window.
2. Select the image view that you wish to view.
3. Drag the row over to the image area on the main window and drop

OR (If you are NOT in CourtViewer mode)

Double click on the view you wish to see.

Playing Video & Clip Creation

Video Overview

Visionary was built from the ground up to support a robust set of video playback features. Visionary permits playback of both synchronized and non-synchronized video and audio files. It also provides simple mechanisms for creating clips that can be recalled in presentation mode. For more information about how to use video or audio files, select from the topics below.

Playing Synchronized Video

To playback video that is synchronized to a transcript in Workbench Mode:

1. Switch to the ‘Video\Text’ screen layout. See View Menu topic.
2. Load the transcript from the Case Explorer.
3. Select or highlight the part of the transcript that you wish to play.
4. Press the play button  or select the ‘Play Video’ menu option from the popup menu that displays when you right mouse click on the transcript.

See Also:Playing Non-Synchronized Audio & Video Files

Importing Synched Video Files

Playing Non-Synchronized Audio & Video Files

To playback an audio or video file that isn’t synchronized to a transcript:

1. Double click on the file to be played under the ‘Non-Synched Video File’ in the Case Explorer.

See Also: Playing Synchronized Video

Importing Video & Multimedia Files

Locating Video Files

Visionary will automatically locate an audio or video file according to the following guidelines:

1. All files within a case must be uniquely named.
2. Files must reside on any connected and mapped drive in one of the following locations:

    a. The root folder of a drive (e.g. ‘c:\myvideo.mpg’)
    b. A ‘video’ folder under the root of a drive (e.g. ‘c:\video\myvideo.mpg’)
    c. A ‘video’ directory inside the case dir (e.g. ‘c:\vs_data\CaseID\video\myvideo.mpg’)

Note: You may see a slight performance boost in playing video files if all the files for a case are stored in the same folder.

Supported Audio & Video File Types

Visionary uses Microsoft's Media Player as the basis for its media playback technology. Accordingly, Visionary can playback any file format that is supported by Media Player. However, the suggested file types for use in Visionary are MPEG-1 and Wave formats.

Note: MPEG-1 vs. MPEG-2 vs. DVD. In recent years, legal videographers began delivering depositions in DVD. DVD movie CD's will not work with Visionary. Although movie DVD's contain MPEG-2 video and may even play in Media Player, they won't work in Visionary because these DVD's aren't created in a data format that allows Visionary to locate the video file (open a DVD up in Windows Explorer if you want to understand this issue further). Visionary can play MPEG-2 files if you have installed the necessary drivers. MPEG-2 offers superior picture quality over MPEG-1 however you should be aware of the following drawbacks: (1) MPEG-2 will consume 2-10 times more the drive space, (2) MPEG-2 will consume 2-10 times the network bandwidth than MPEG-1, (3) MPEG-2 files will have to be delivered on DVD or hard drives – CD's don't have the required capacity, (4) an MPEG-2 file that plays on one machine, may not play on another due to driver issues. When the video is produced properly, MPEG-1 delivers good video quality with manageable file sizes. This is the reason that it is the standard video format in the legal industry.

Synchronizing Video To Transcripts

Visionary does not currently provide the ability to synchronize transcripts to video. However, Visionary does offer this functionality in its voice recognition based product Visionary Auto-Syncer. Contact Visionary for further details.

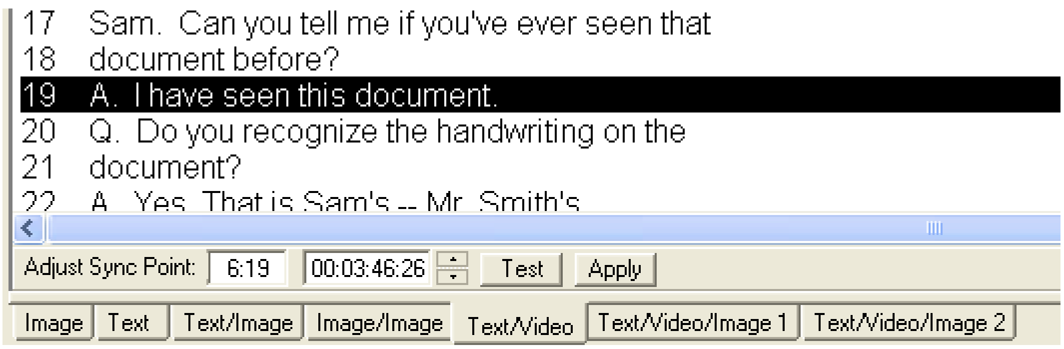
See also: Adjusting Sync Points

Adjusting Sync Points

Although Visionary does not provide the ability to synchronize a video to a transcript, it does provide a mechanism for making minor adjustments to the video sync data on a line-by-line basis.

To adjust a sync point:

1. Select the ‘Utilities\Adjust Sync Data’ menu item on the main window. This will cause the Adjust Sync Point toolbar to appear below the transcript.
2. Use the up and down arrows on the Adjust Sync Point toolbar to start the video earlier or later.

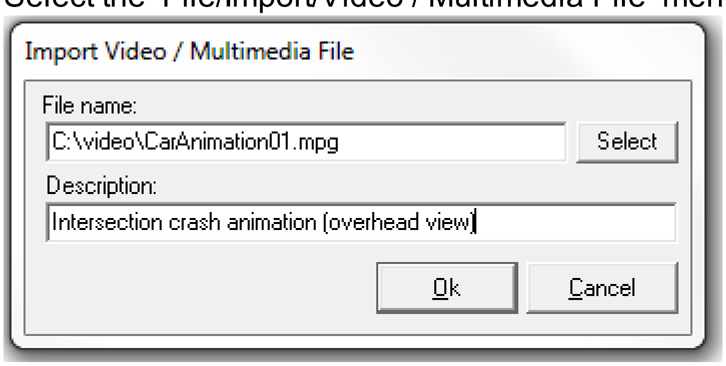


3. Press the ‘Test’ button to preview the results of your adjustment.
4. Press the ‘Apply’ button to write your adjustment to the database.

Importing Video & Multimedia Files

To import non-synchronized video or audio files:

1. Select the ‘File/Import/Video / Multimedia File’ menu item on the main window.



2. Click ‘Ok’.

Warning: When working in a multi-user environment, be aware that the playback drivers may be different from one computer to the next. This can especially be a problem when using file formats other than MPEG-1, AVI, or WAV.

See also:Supported Audio & Video File Types

Importing Synced Video Files

Note: Video files that are synchronized with transcripts, don't have to be imported into Visionary. The only requirement for their use is that they be placed in one of the Video Folder Search Locations. This feature is meant to assist users in copying video files to the correct location without the need to perform this task in Windows Explorer.

To import (or more precisely copy) synchronized video files:

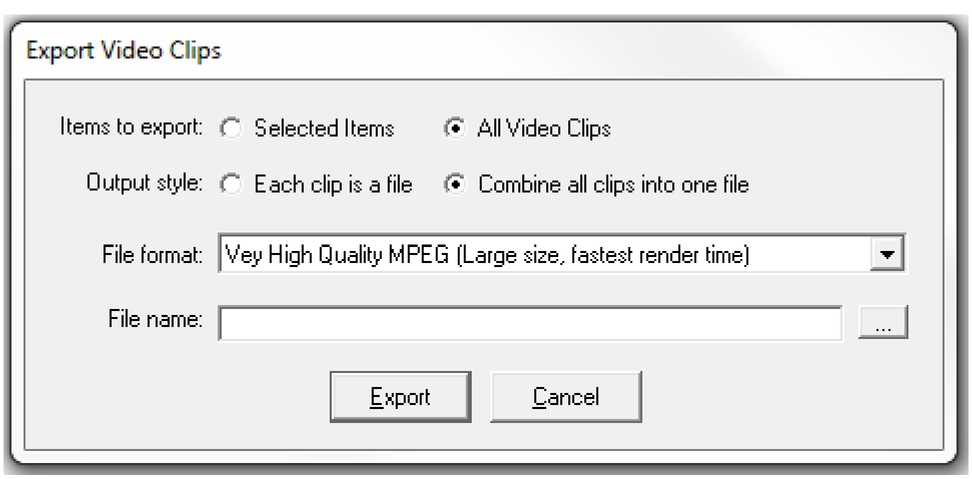
1. Select the 'File/Import/Synced Video File' menu item on the main window.
2. Select the file to import.
3. Click the 'Open' button.

See also: Locating Video Files

Exporting Video Clips

The export video clip feature provides the ability to export portions of synchronized MPEG video files into smaller files that only contain the specified video clips.

1. To export a Video Clip:
2. Open the IssueBuilder that contains the clips to be exported.
3. Select the 'File/Export/Video Clips' menu item on the IssueBuilder window.
4. Set the export parameters.



5. Items to export – Select the option to export the currently selected clips or all of the video clips.
6. Output style – Select the option to either create a new MPEG file for each clip or to combine all of the clips into a single MPEG file.
7. Using the ellipsis button, choose the file or directory to export the clips into.
8. Press the ‘Export’ button.
9. Upon completion, click the ‘Ok" button to close the Action Completed window.

Warning: Some MPEG files are not editable by Visionary due to being encoded in a manner that is outside the normal parameters used by mainstream encoding cards like that of Optibase.

Video Objection Editing

Objection Editing

Visionary's Objection Editing feature provides an easy mechanism for dealing with objections and other portions of transcripts that needs to be omitted during the playback of video in trial or other presentation settings. In a nutshell, Objection Editing allows you to designate portions of transcripts that should never be played – either from IssueBuilder video clips or in an ad hoc fashion.

See Also: Creating a Video Objection Clip

Editing Objection Start & End Times

Deleting Objection Clips

Objection Toolbar

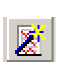
Text/Objection Toolbar

The objection toolbar is located on the toolbar of the main window.

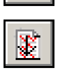
 - Create objection clip for selected text (CTRL-O may also be used).

 - Delete the currently selected objection.

 - Edit the start/end time values for the selected objection (CTRL-U may also be used).

 - Reset all of the objection start/end time values from values in the transcript sync database.

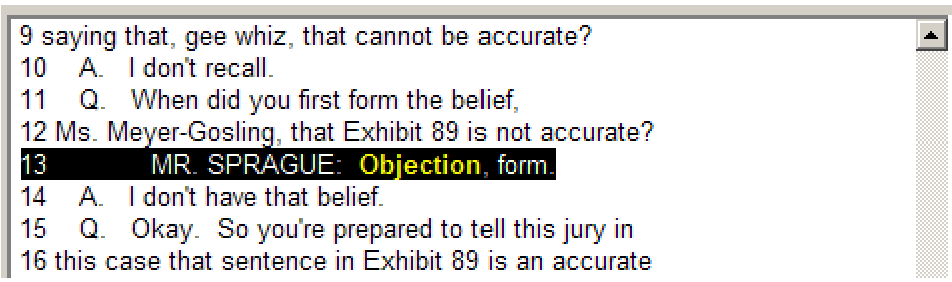
 - Move to the previous objection clip in the loaded transcript.

 - Move to the next objection clip in the loaded transcript.

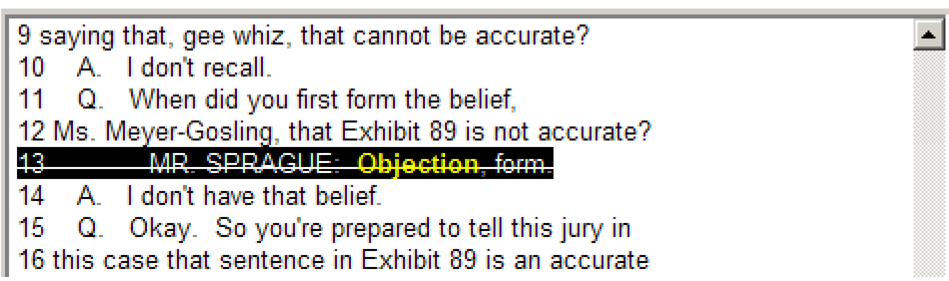
Creating a Video Objection Clip

To create a Video Objection clip:

1. Load a transcript from the Case Explorer.
2. Select the portion of the transcript that is to be omitted from video playback.



3. Press the ‘Add Objection’ icon  on the main toolbar or select the ‘Objections / Add’ menu item from the transcript popup menu that displays when you right mouse click on the transcript. The selected text will now appear with a line through it.



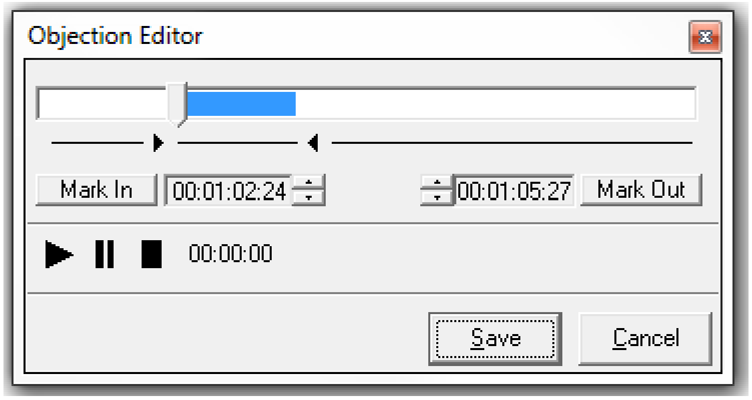
See Also:Editing Objection Start & End Times

Deleting Objection Clips

Editing Objection Start & End Times

Objection Clips define areas of the transcript and video that will not be displayed during playback. To adjust the start and end times of these objection areas:

1. Click anywhere on the text where an objection has been defined.
2. Press the ‘Edit Objection’ icon  on the main toolbar or select the ‘Objections / Edit’ menu item from the transcript popup menu that displays when you right mouse click on the transcript.
3. Make the required adjustments in the Objection Editor.



To adjust the start/end points:

Click and drag the triangle start/stop markers. 

Or

Adjust the frame values up/down using the up/down buttons. 

Or

Press the ‘Mark In/Out’ buttons while the video is playing.

4. Press the ‘Save’ button.

Deleting Objection Clips

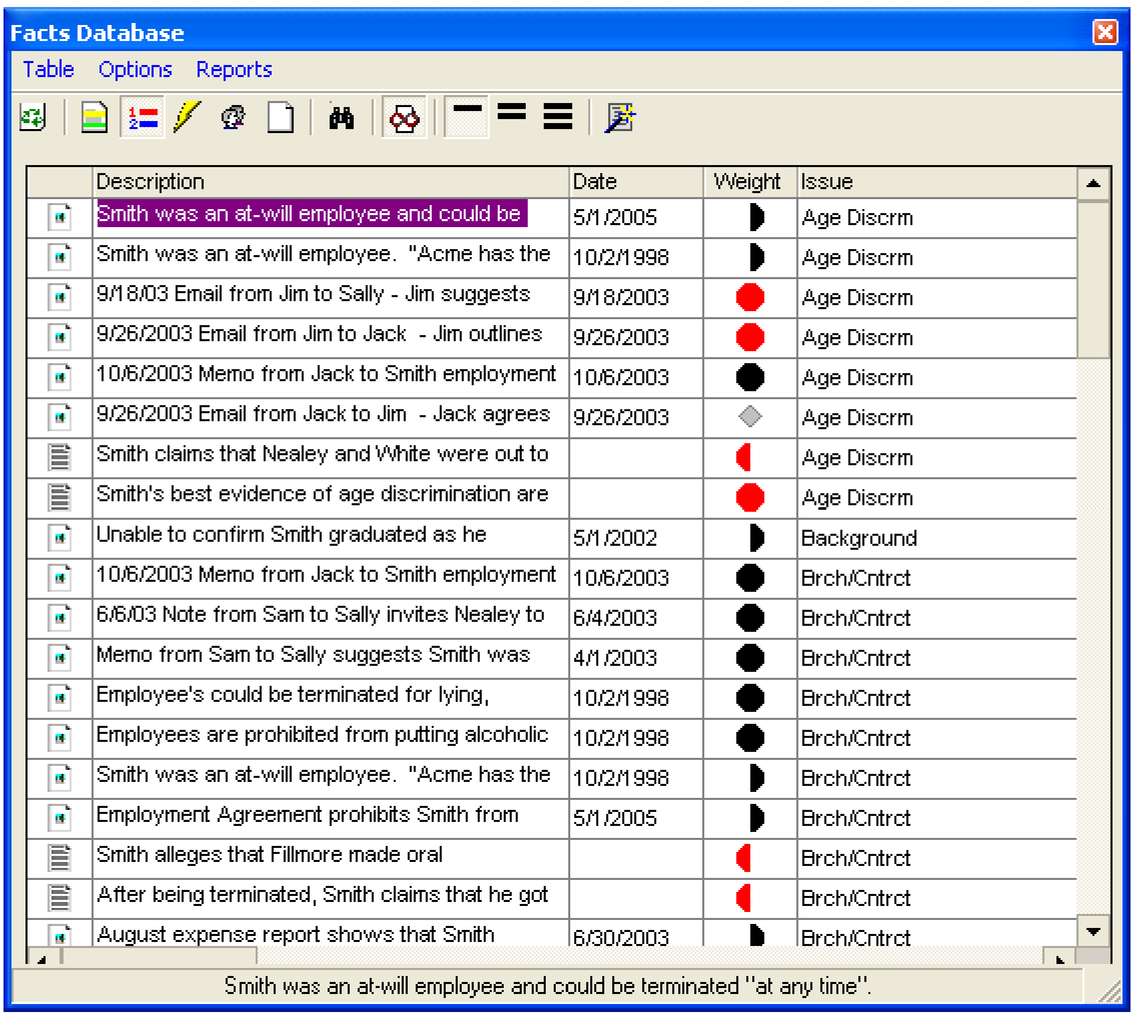
To delete an objection clip:

1. Click anywhere on the text where an objection has been defined.
2. Press the ‘Edit Objection’ icon  on the main toolbar or select the ‘Objections / Edit’ menu item from the transcript popup menu that displays when you right mouse click on the transcript.

Transcript and Image Facts Issues Chronology Coding

Facts Database

Fact Coding allows users to associate descriptions, people, events, issues, dates and importance to transcript clips and document pages. Using this tool, along with the Fact Digest Wizard, users can instantly identify which legal issues are supported or refuted, the chronology of events, and which people or documents are key to any specific issue. In addition, the Facts Database can also be used for tracking all trial designations and counter designations for all parties in a case.



	Description	Date	Weight	Issue
	Smith was an at-will employee and could be	5/1/2005		Age Discrm
	Smith was an at-will employee. "Acme has the	10/2/1998		Age Discrm
	9/18/03 Email from Jim to Sally - Jim suggests	9/18/2003		Age Discrm
	9/26/2003 Email from Jim to Jack - Jim outlines	9/26/2003		Age Discrm
	10/6/2003 Memo from Jack to Smith employment	10/6/2003		Age Discrm
	9/26/2003 Email from Jack to Jim - Jack agrees	9/26/2003		Age Discrm
	Smith claims that Nealey and White were out to			Age Discrm
	Smith's best evidence of age discrimination are			Age Discrm
	Unable to confirm Smith graduated as he	5/1/2002		Background
	10/6/2003 Memo from Jack to Smith employment	10/6/2003		Brch/Cntrct
	6/6/03 Note from Sam to Sally invites Nealey to	6/4/2003		Brch/Cntrct
	Memo from Sam to Sally suggests Smith was	4/1/2003		Brch/Cntrct
	Employee's could be terminated for lying,	10/2/1998		Brch/Cntrct
	Employees are prohibited from putting alcoholic	10/2/1998		Brch/Cntrct
	Smith was an at-will employee. "Acme has the	10/2/1998		Brch/Cntrct
	Employment Agreement prohibits Smith from	5/1/2005		Brch/Cntrct
	Smith alleges that Fillmore made oral			Brch/Cntrct
	After being terminated, Smith claims that he got			Brch/Cntrct
	August expense report shows that Smith	6/30/2003		Brch/Cntrct

See Also: Facts Database Setup

Creating Fact Entries

Reviewing Fact Entries

Facts Digest Wizard

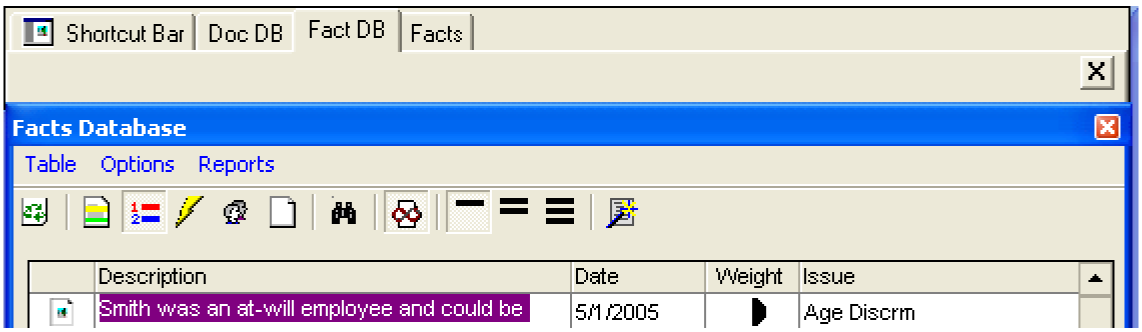
Creating Trial Designations

Reviewing Case Facts

Facts may be reviewed on both a document-by-document basis and on a case basis.

To view Facts for all the documents and transcripts in your case:

1. Select the ‘Fact DB’ tab on the Shortcut Bar.



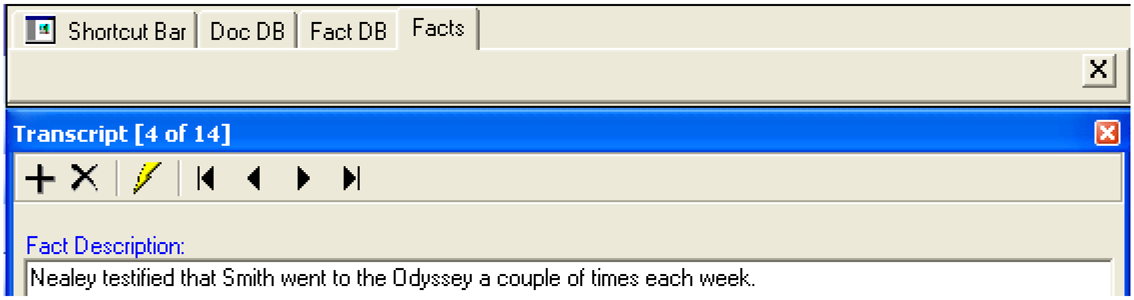
2. Select a Fact filter (Designations, Events, Issues, People, or Fact description) on the Fact Database window.

3. Sort the fields as desired by clicking on any of the column headings.

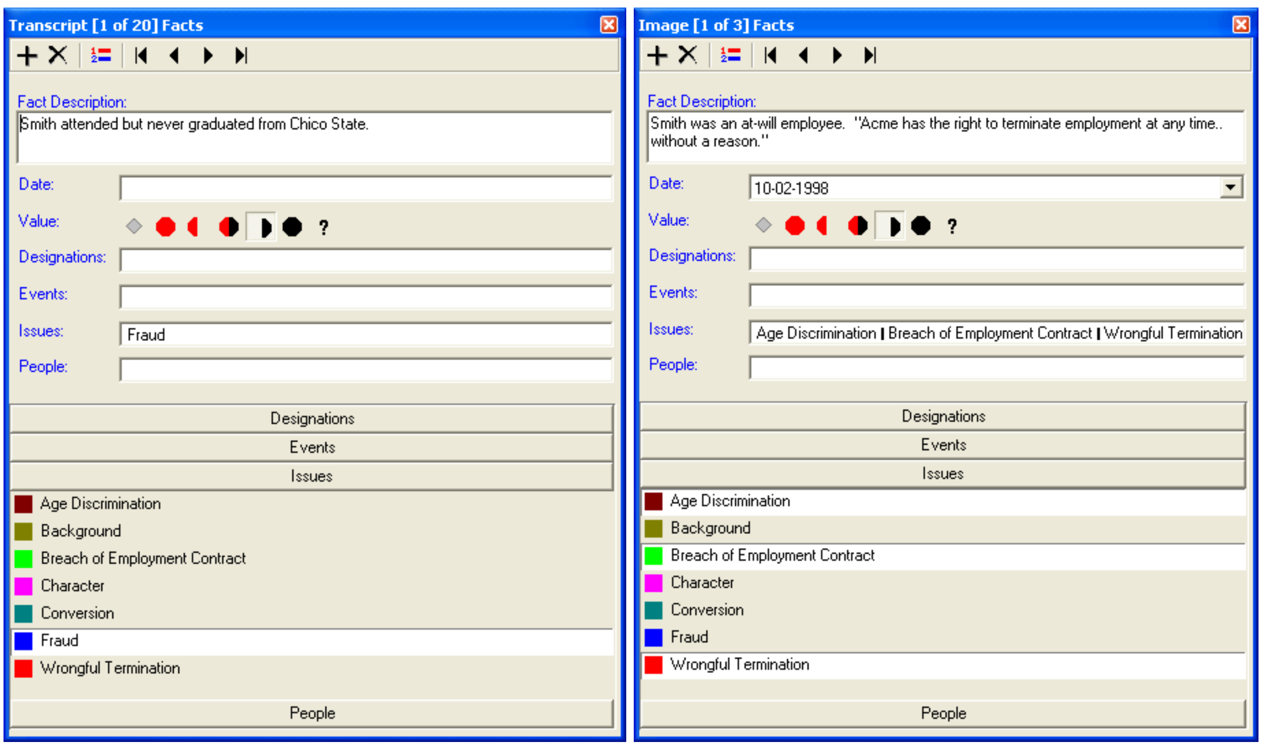
See Also: Facts Database Window

To view Facts on a Fact by Fact basis:

1. Select the ‘Facts’ tab on the Shortcut Bar.



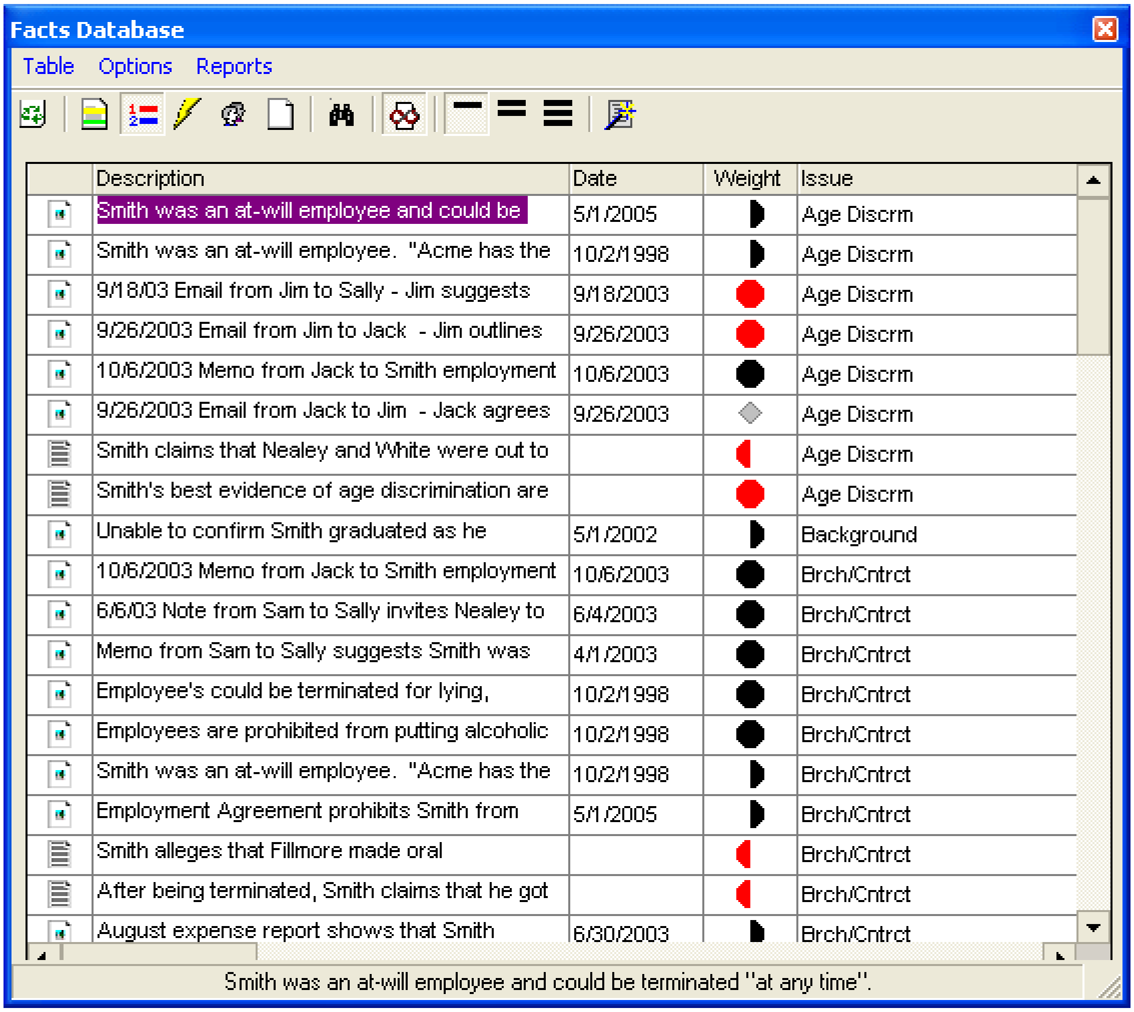
2. Load either a transcript or document. If Facts have been associated with the document or transcript, you will see the caption of the Facts window change to reflect what you selected and the number of Facts associated with that item.



3. To move through the Facts for a specific item, use the navigation buttons located at the top of the Facts window.

Facts Database Window

The Facts Database Window shows the Facts or designations for the entire case. Which Facts are displayed is determined by which filter is selected on the window's toolbar. An explanation of the Facts Database Window follows:

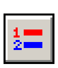


	Description	Date	Weight	Issue
	Smith was an at-will employee and could be	5/1/2005		Age Discrm
	Smith was an at-will employee. "Acme has the	10/2/1998		Age Discrm
	9/18/03 Email from Jim to Sally - Jim suggests	9/18/2003		Age Discrm
	9/26/2003 Email from Jim to Jack - Jim outlines	9/26/2003		Age Discrm
	10/6/2003 Memo from Jack to Smith employment	10/6/2003		Age Discrm
	9/26/2003 Email from Jack to Jim - Jack agrees	9/26/2003		Age Discrm
	Smith claims that Nealey and White were out to			Age Discrm
	Smith's best evidence of age discrimination are			Age Discrm
	Unable to confirm Smith graduated as he	5/1/2002		Background
	10/6/2003 Memo from Jack to Smith employment	10/6/2003		Brch/Cntrct
	6/6/03 Note from Sam to Sally invites Nealey to	6/4/2003		Brch/Cntrct
	Memo from Sam to Sally suggests Smith was	4/1/2003		Brch/Cntrct
	Employee's could be terminated for lying,	10/2/1998		Brch/Cntrct
	Employees are prohibited from putting alcoholic	10/2/1998		Brch/Cntrct
	Smith was an at-will employee. "Acme has the	10/2/1998		Brch/Cntrct
	Employment Agreement prohibits Smith from	5/1/2005		Brch/Cntrct
	Smith alleges that Fillmore made oral			Brch/Cntrct
	After being terminated, Smith claims that he got			Brch/Cntrct
	August expense report shows that Smith	6/30/2003		Brch/Cntrct

Toolbar Buttons

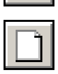
 - Refreshes the database grid view.

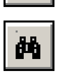
 - Show all facts associated with designations.

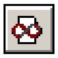
 - Show all Facts associated with Issues.

 - Show all Facts associated with Events.

 - Show all Facts associated with People.

 - Show all Facts.

 - Search Facts

 - Auto load Fact source.

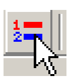
 - Set the Description column line spacing.

 - Run Facts Digest Wizard.

To sort Fact data: Click on the column to be sorted.

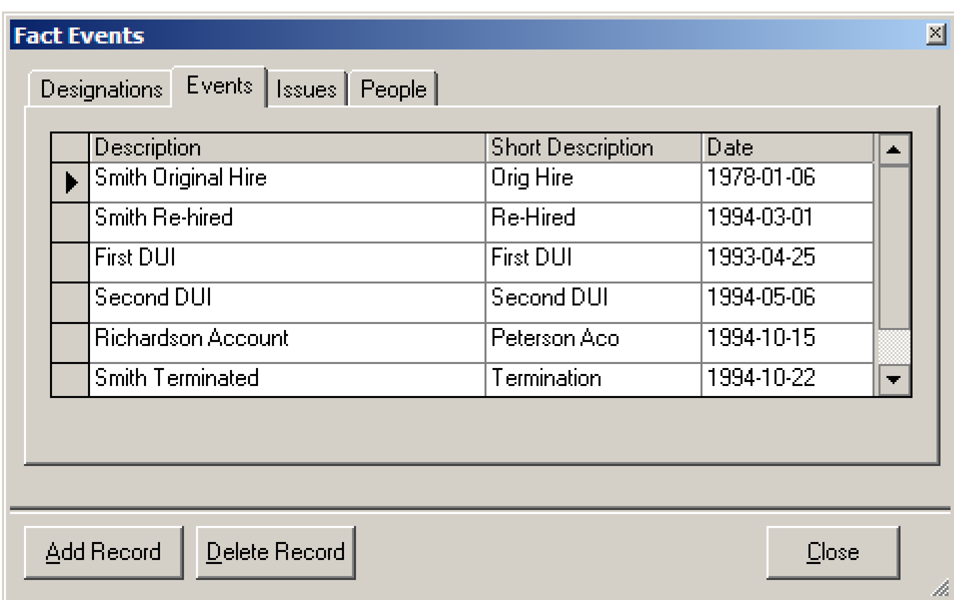
Setting-Up the Facts Database

Although it isn't absolutely necessary, it's useful to enter the list of events, issues, and people that you want to track and/or associate with the Facts at the beginning of your case. You can define the lists associated with your case by launching the Events/Issues/People/Designations dialog from the Facts window. Press the 'Display Events/Issues/People' Table button on the Facts dialog window.



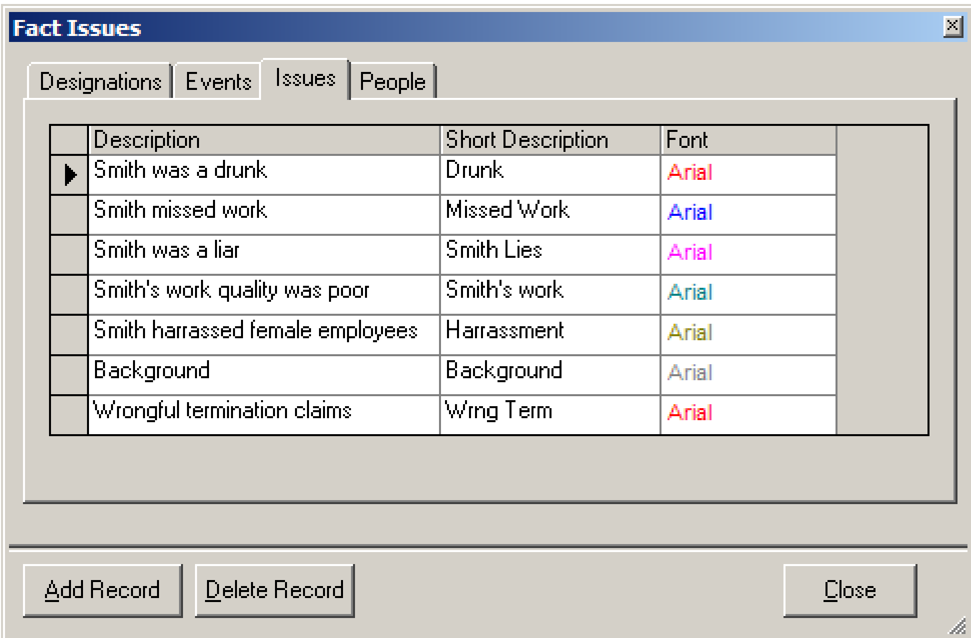
Events

Items can be added and deleted from the Events list by pressing the buttons at the bottom of the Designations/Events/Issues/People dialog. To edit an item in the events list, simply click on the item that you wish to modify. You must enter information in the Description and Short Description fields. The Short Description field is used in the FactsDB window to make it possible to see more columns of information.



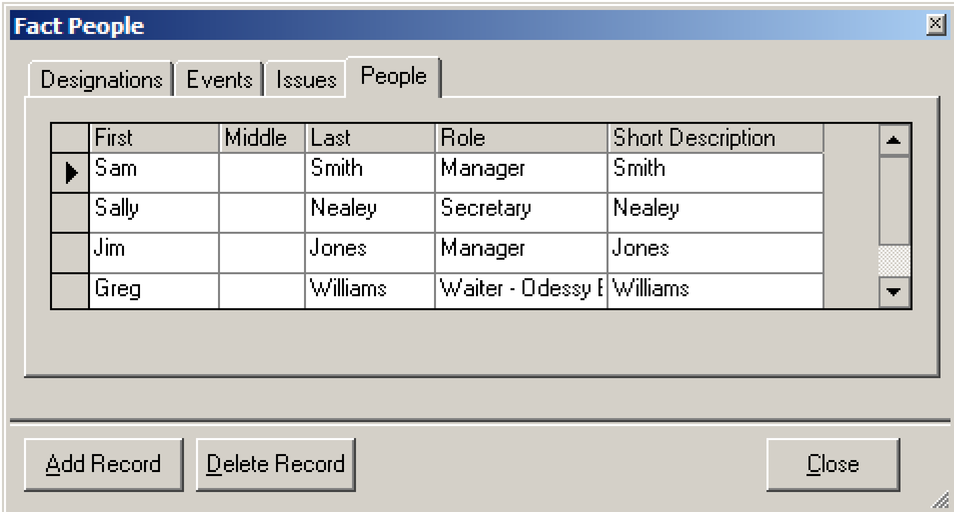
Issues

Items can be added and deleted from the Issues list by pressing the buttons at the bottom of the Designations/Events/Issues/People dialog. To edit an item in the Issues list, simply click on the item that you wish to modify. You must enter information in the Description and Short Description fields. You may also associate a color with issues that will be used to identify portions of transcripts that are associated with a specific Issue. The Short Description field is used in the FactsDB dialog to make it possible to see more columns of information.



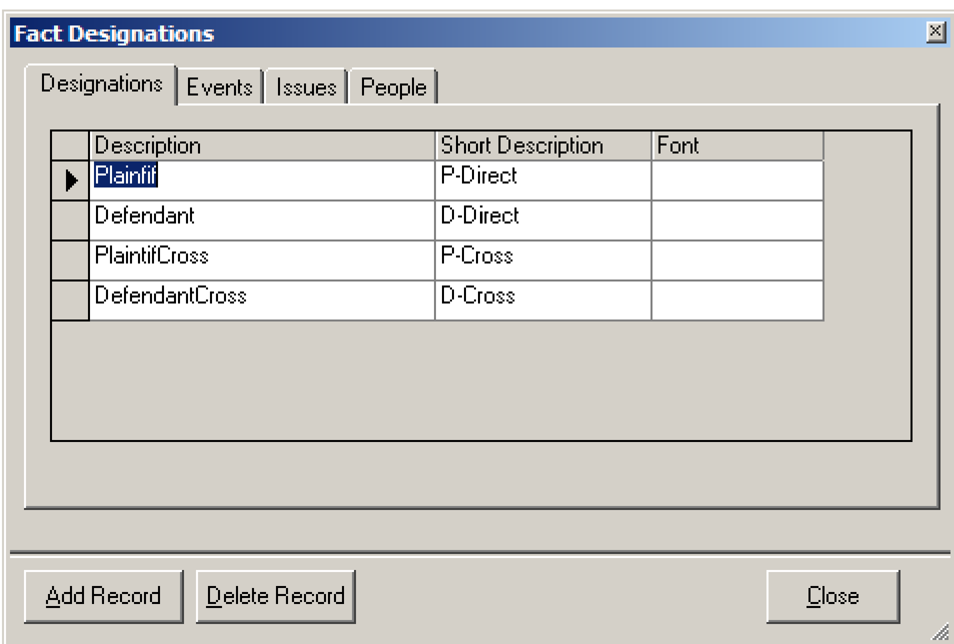
People

Items can be added and deleted from the People list by pressing the buttons at the bottom of the Designations/Events/Issues/People dialog. To edit an item in the People list, simply click on the item that you wish to modify. You must enter information in the First, Last and Short Description fields. The Short Description field is used in the FactsDB dialog to make it possible to see more columns of information.



Designations

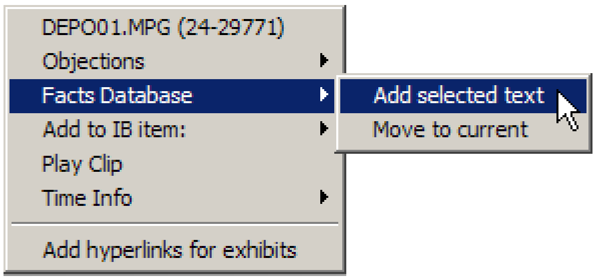
Items can be added and deleted from the Designations list by pressing the buttons at the bottom of the Designations/Events/Issues/People dialog. To edit an item in the Designations list, simply click on the item that you wish to modify. You must enter information in the Description and Short Description fields. You may also associate a color with issues that will be used to identify portions of transcripts that are associated with a specific Issue. The Short Description field is used in the FactsDB dialog to make it possible to see more columns of information.



Creating Fact Entries

Creating Facts from Transcript Clips

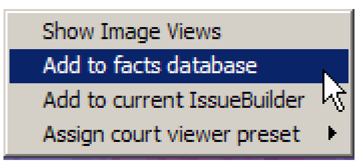
To define a Fact that is associated with part of a transcript, highlight part of a transcript, right mouse click to display the transcript popup menu, and select the 'Facts Database/Add Selected Text' menu item.



You may also create Facts by selecting a portion of text and dragging the transcript drag icon onto the Facts dialog or by pressing the 'Add' button on the Facts dialog tool bar.

Creating Facts from Images

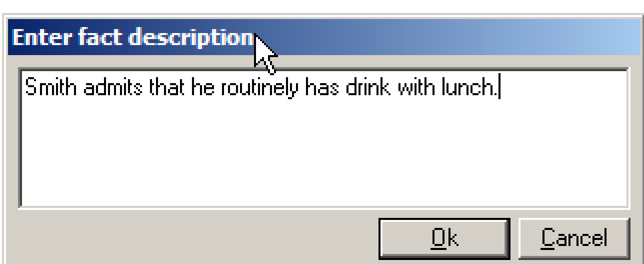
To define a Fact that is associated with part of a document, right mouse click on the image to display the image popup menu, and select the 'Add to facts database' menu item.



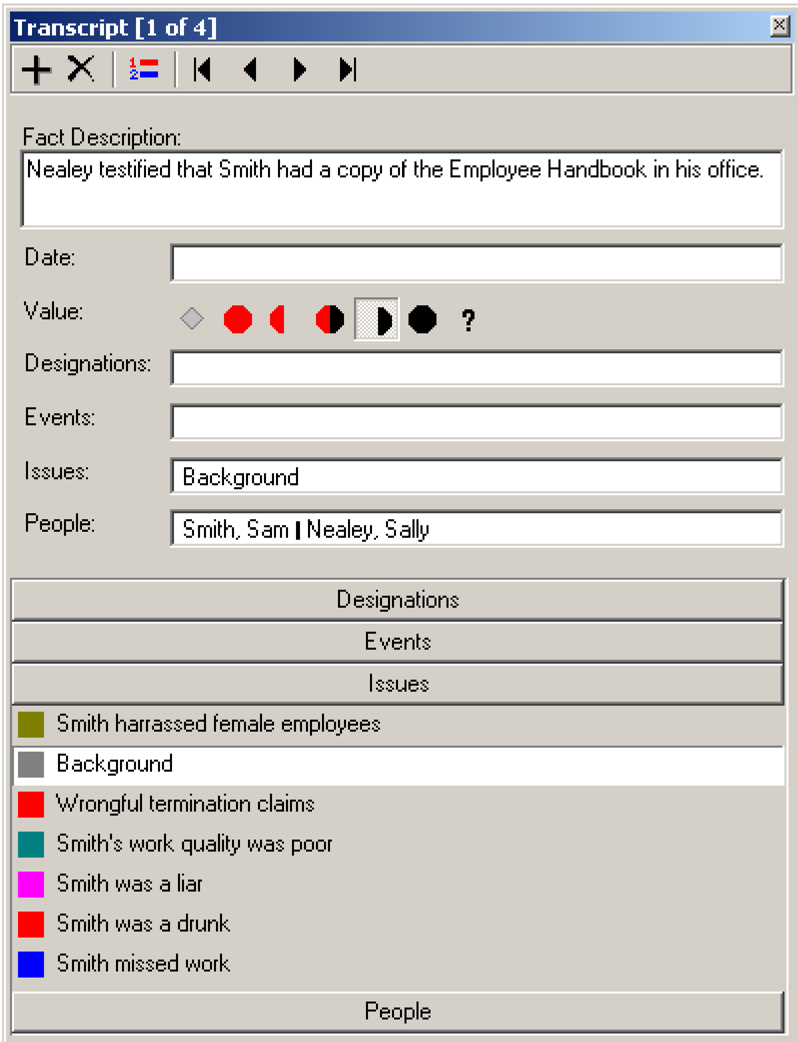
You may also create Facts by dragging the image drag icon onto the Facts dialog or by pressing the 'Add' button on the Facts dialog tool bar.

Setting Fact Properties

When you create a Fact, you will be prompted to enter the Fact description information. By default the Fact will assume the description of the source transcript or document. However, you can enter your own description of the Fact.



The Facts Dialog window allows you to associate a description, date, weight (value), events, issues and people with the Fact.



Fact Description Field

By default, the Fact Description will describe the Fact's source. Normally, you will want to enter your own text to describe the Fact.

Date Field

The Date field allows you to associate a date with the Fact. The default format for this field is 'YYYY-MM-DD'. If the exact month or day isn't known, you may enter '00' in its place. For example, if you knew the event occurred in 1998, but didn't know the exact month, you could enter 1998-00-00. By entering information in this field, it is possible to generate reports (see Facts Digest Wizard) that are sorted by date. In a sense, it will allow you to create a timeline of the Facts.

Value Field

The Value field allows you to associate a value or weight to Fact. In other words, it allows you to indicate if the Fact helps, hurts, or is neutral to your case. The symbols are explained below.

- Fact weight has yet to be determined.

– Fact is bad, hurts your case.

- Fact is slightly bad, hurts the case a little.

- Fact is neutral or helps and hurts the case.

- Fact is slightly good, helps the case a little.

- Fact is good, helps the case a lot.

- Don't know if Fact is good or bad.

Events, Issues and People Fields

The Events, Issues and People Fields display what Events, Issues, and People are associated with the Fact.

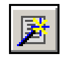
NOTE: You cannot enter data in these fields. To associate an Event, Issue, or Person with the Fact, select the items that you wish to associate from the selection list box. To see the list of possible Events, Issues or People, press the corresponding button. To add Events, Issues, or People to your selection lists, press the 'Display Events/Issues/People Table button on the Facts dialog window.

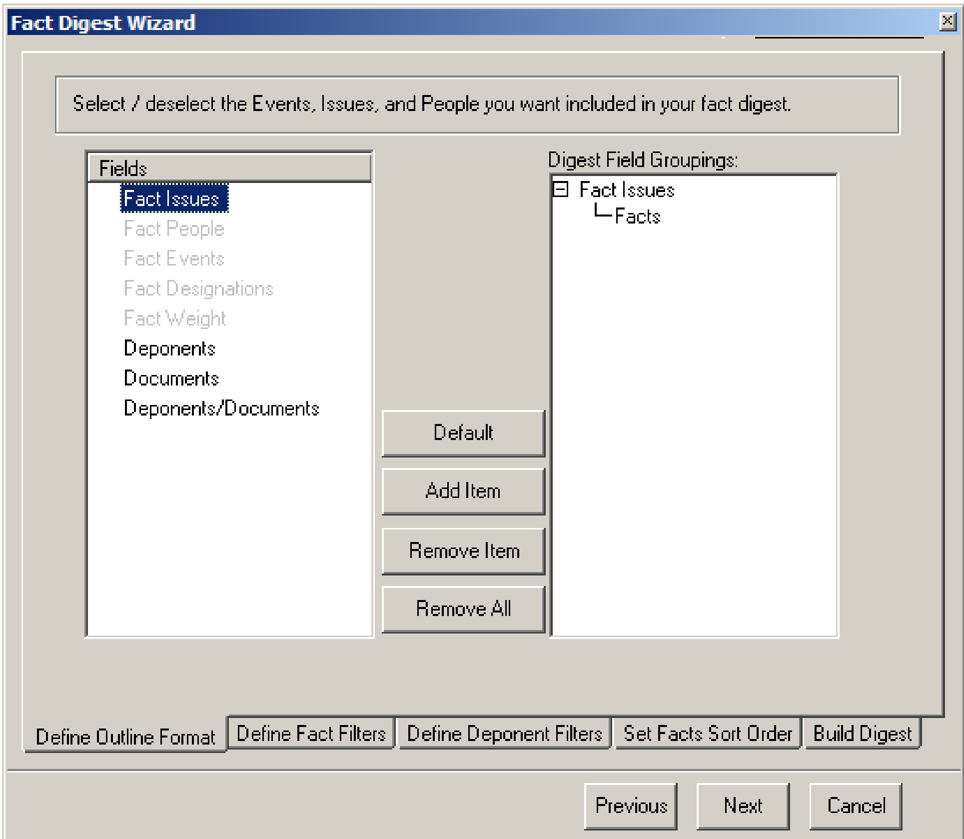
.

Fact Digest Wizard

The Fact Digest Wizard is a versatile reporting tool that allows you to filter, group, and sort Facts into IssueBuilder outlines. The wizard prompts you to design the outline structure, filter which Designations, Events, Issues, and People to include in the report, filter which depositions should be included, set the sort order, and determine to which IssueBuilder these Facts should be added. Details of the process are outlined below.

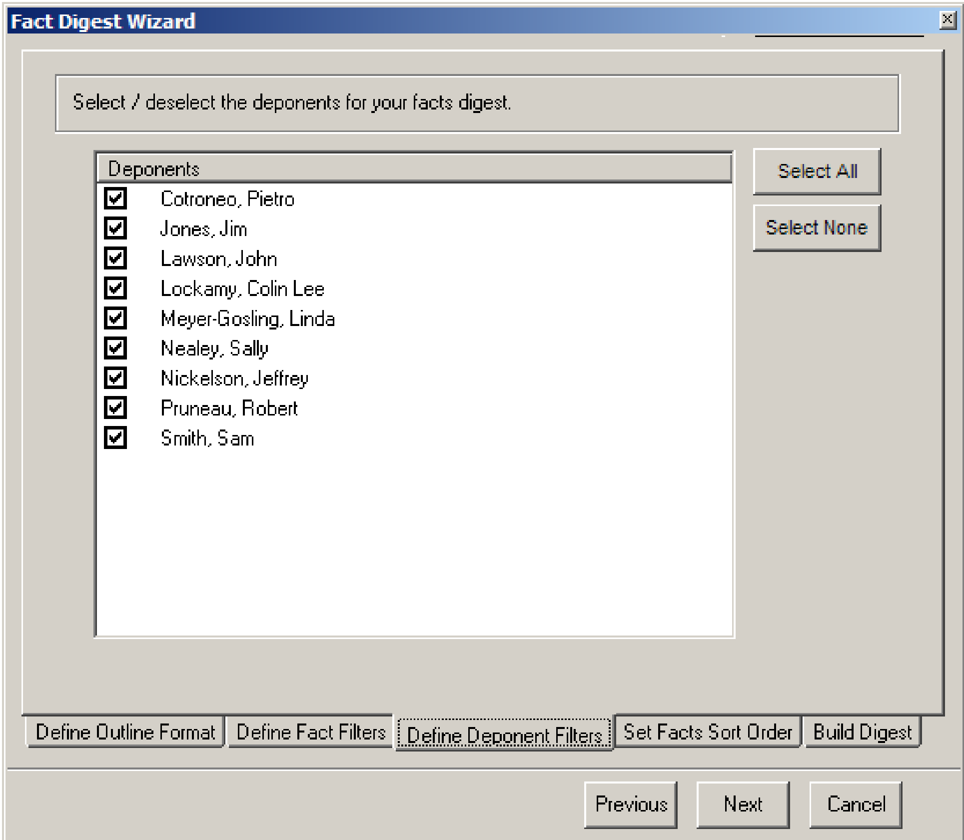
To run the Facts Digest Wizard:

1. On the Facts Database Window, select the ‘Reports / Facts Digest Wizard’ menu item or press the Digest Wizard icon. 
2. Select the outline hierarchy grouping options. This will determine the structure of the IssueBuilder.

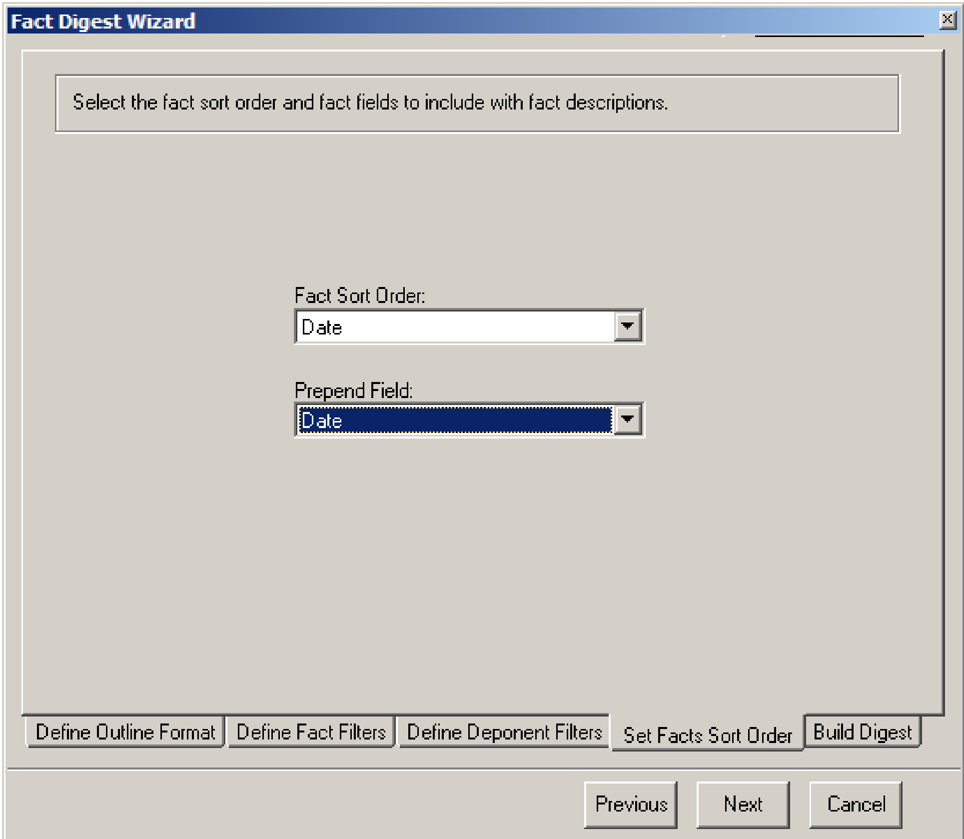


3. Select the Designations, Events, Issues, and People categories to be included in the digest. Any Fact that is associated with any of the selected items (as opposed to all of the selected items) will be included in the digest.

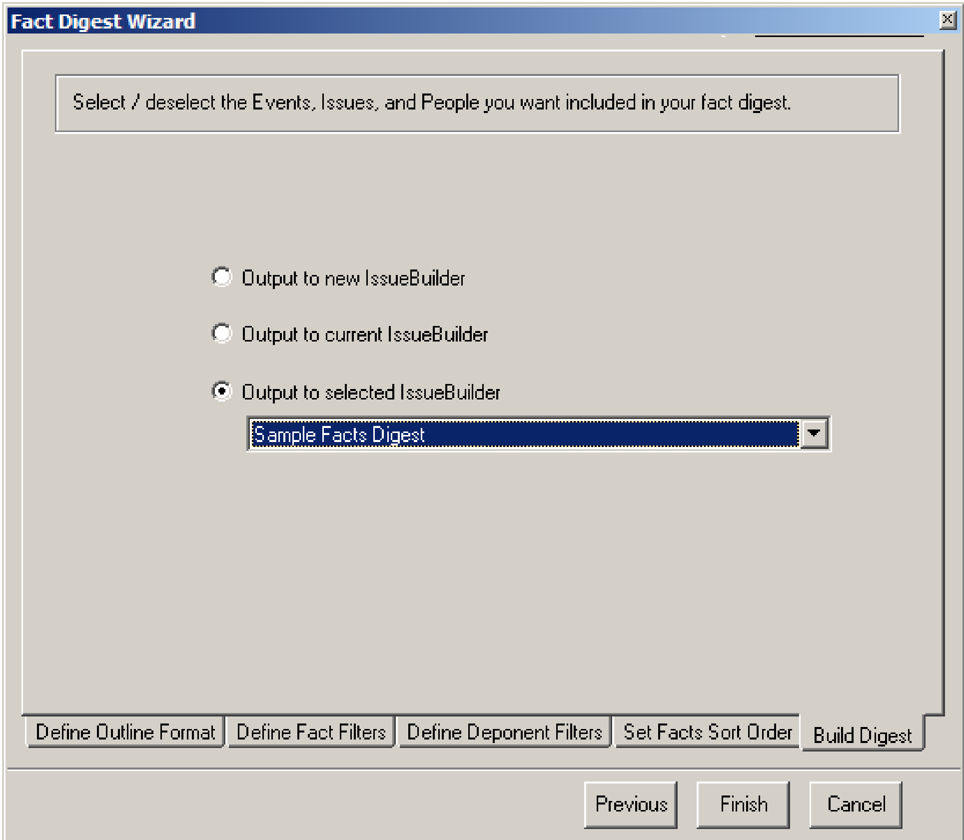
4. Select which deponent transcripts you want included in the digest.



5. Select the sort order and what information you want added to the start of digest Facts.



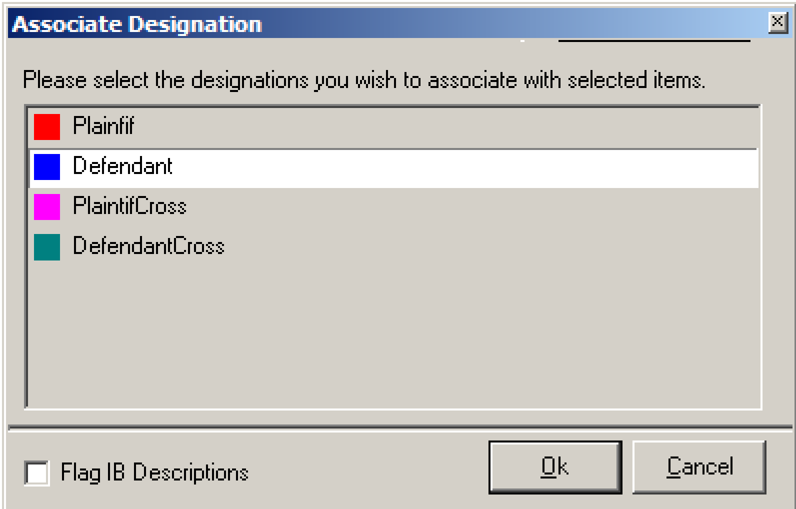
6. Select what IssueBuilder the Facts Digest Wizard should output to.



Populating Designation List From IssueBuilders

To add IssueBuilder transcript clips to Designations tracked in the Fact Database:

1. Open the IssueBuilder containing the list of Designations.
2. Select the transcript clip(s) to be added to the Fact Database as Designations.
3. Select the designation type.


Associate Designation
Please select the designations you wish to associate with selected items.
Plainfif
Defendant
PlaintifCross
DefendantCross
Flag IB Descriptions
Ok
Cancel

Press ‘Ok’.

Searching Data

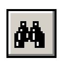
Overview

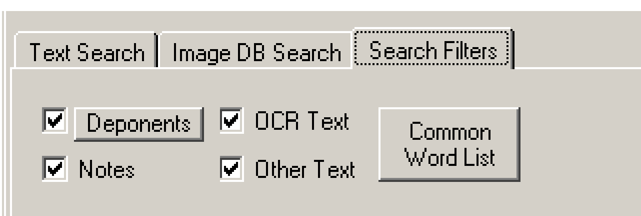
Visionary provides the ability to search transcripts, OCR files, user notes, and document databases. It also provides the ability to do the same for full text searches on the Document Database. For more information on searching data in Visionary, see the following topics:

- Searching Transcripts, OCR & Other Text
- Filtering Deponents
- Searching the Document Database
- Search Window

Searching Transcripts, OCR & Other Text

To search transcripts, OCR, and/or other text:

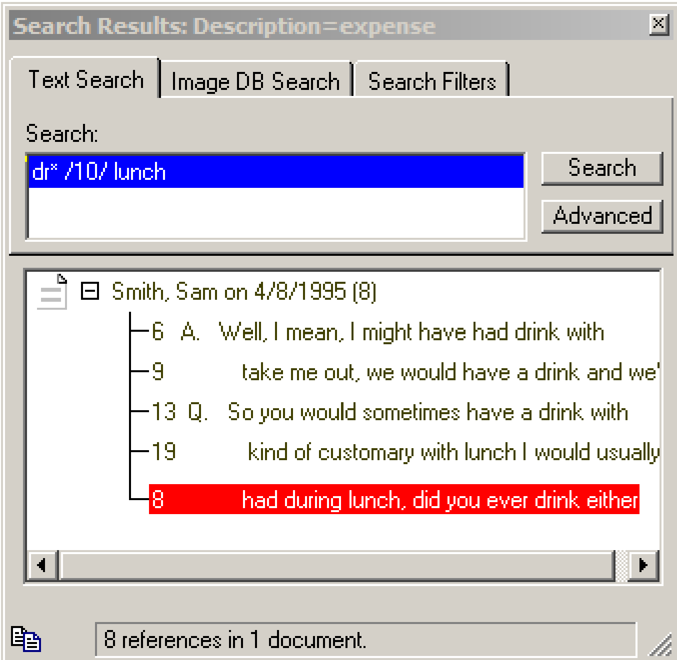
1. Click on the search icon  on the main window's toolbar to display the search window.
2. On the search window, select the 'Search Filters' tab and select the data types that you wish to search.



Deponents Button – Displays a dialog that allows you to select which deponents to search. See the Filtering Deponents topic for more information.

Common Word List – Displays a dialog that allows you to define the 'common word' list. The common word list defined the set of words that are not indexed. For more information about the common word list feature, see the Common Word List topic.

3. On the search window, select the 'Text Search' tab.
4. Enter the words or phrase that you wish to search for.



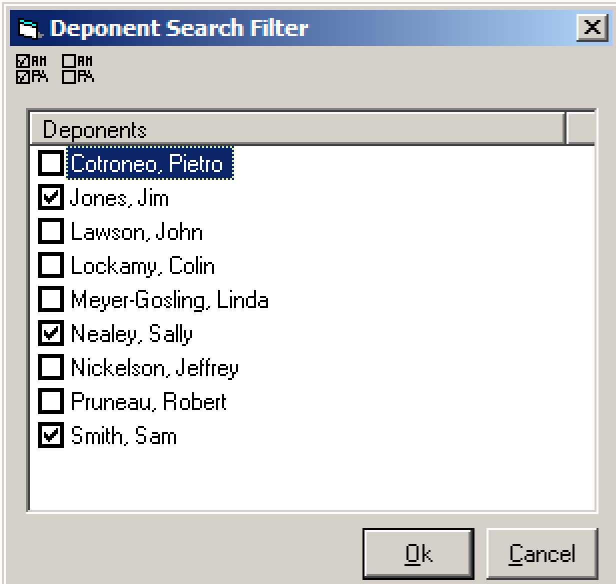
5. If desired, you can press the 'Advanced' button to reveal the Advanced Search Operator assistant. See the Search Operators topic for a list of all the Boolean and proximity that are available when performing full text searches.

6. Press the 'Search Button'.

Filtering Deponents

To filter which deponents will be searched:

1. On the search window, select the 'Search Filters' tab.
2. Press the deponents button.
3. Select which deponents should be searched.



 - Select all deponents.

 - Select no deponents.

4. Press ‘Ok’.
5. Switch to the ‘Text Search’ tab and perform your search.

Saving Search Results

To save the all results of a query:

1. Perform a search.
2. Press the drag icon  located at the bottom of the Search Window and drag it over and drop it on an IssueBuilder.

To save selected results from a transcript query:

1. Perform a search.
2. Click and drag a transcript heading in the results window over to an IssueBuilder.

Search Operators

In addition to searching for word phrases, Visionary allows you to use Boolean and proximity operators to locate relevant documents.

Boolean Operators

The following operators can be used between words to apply simple Boolean logic.

And

The operator is used to locate documents that contain both of the entered words or phrases anywhere in the same document. Query syntax example: ‘lunch and bar’.

Or

This operator is used to locate documents that contain any one of the entered words or phrases. Query syntax example: ‘drunk or alcoholic’.

Proximity Operators

Within x Words of

This operator is used to locate documents that contain a word or phrase that is within "x" words of another word or phrase. The variable "x" is user-definable. Query syntax example: ‘drink /5/ lunch’

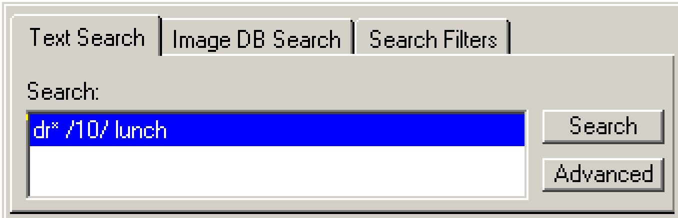
Within x Lines of

This operator is used to locate documents that contain a word or phrase that is within "x" lines of another word or phrase. The variable "x" is user-definable. Query syntax example: ‘drink /2/ lunch’

Search Window

Text Search Tab

The Text Search tab is used for performing full text searches on transcripts, OCR, Other Text, and User Notes. The exact types of data to be searched can be modified on the Search Filters Tab.



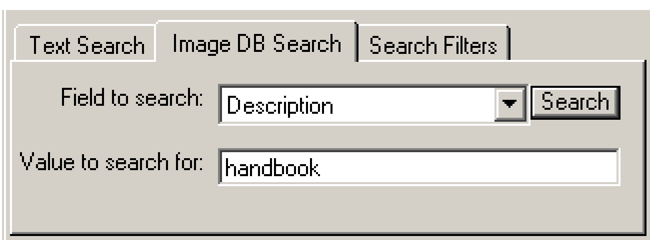
Search Text Box – Enter the search parameters (words, phrases, and/or search operators).

Search Button – Execute the specified search request.

Advanced Button – Causes the Boolean and proximity options to be displayed.

Image DB Search Tab

The Image DB Search tab is used for performing searches on the Document Database.



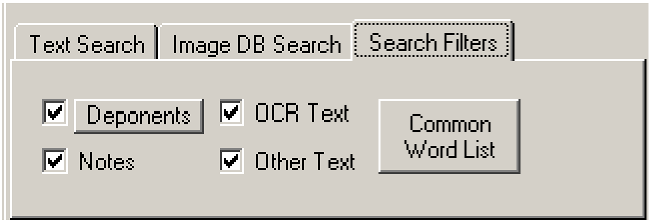
Field to search text box – Select the Document Database field to be searched.

Value to search for text box – Enter the text or value to search for here.

Search button – Executes the specified search.

Search Filters Tab

The Search Filters tab is used to filter what data is searched for in Text Searches.



Check Boxes - When checked, the Deponents, OCR Text, Notes, and Other Text options cause Visionary to include the respective data types when performing searches.

Deponents Button - Causes the Deponents Filter Dialog box to be displayed.

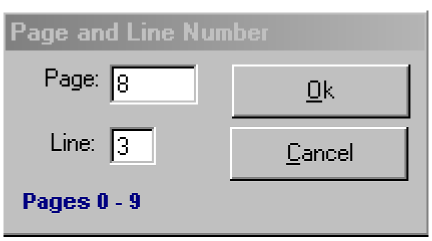
Common Words List Button - <Professional Plus Only> Will cause the Common Word List dialog to display.

Page and Line Searches

Once a transcript is loaded, Visionary allows to you jump to a specified page line designation.

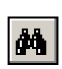
To Perform a Page/Line Search:

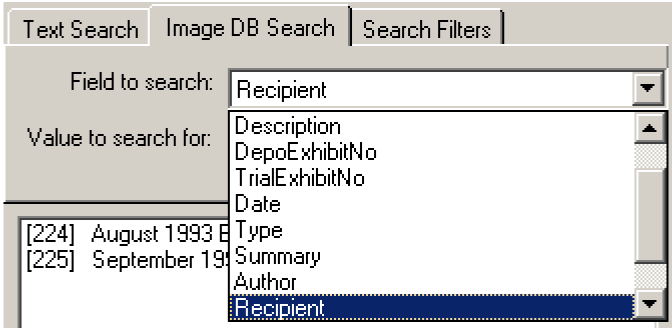
1. Load a deposition transcript.
2. Select the ‘Search/Page and Line Number’ menu item on the Main Window.
3. Enter the page and line that you want to search for and press the ‘Ok’ button.



Searching the Document Database

To search the Document Database:

1. Click on the search icon  on the main window’s toolbar to display the search window.
2. On the search window, select the ‘Image DB Search’ tab.
3. Select the field to be searched.



4. Enter the word that you wish to search for and press the ‘Search’ button.
5. The search results will then be displayed in the search results area.
6. To display one of the document associated with a result, click on one of the result lines.

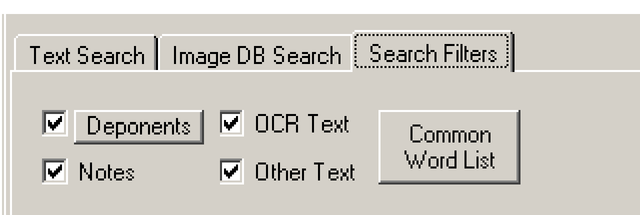
Common Word List

Note: This is only applicable to the Professional Plus edition.

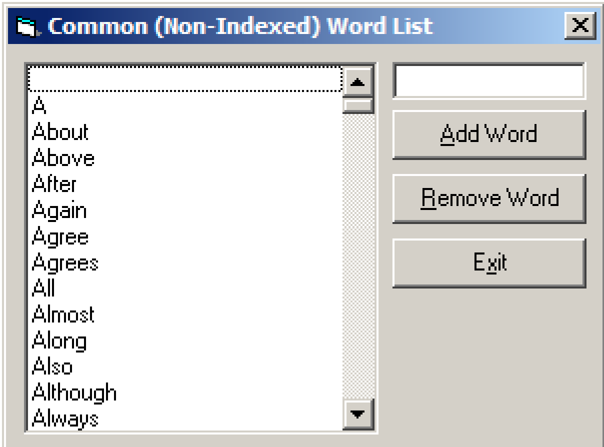
The common word list defines the list of words that are not indexed and that are therefore not searchable. This list of words eliminates those words that would produce such numerous as hits as to not useful. This common word list is also used to eliminate certain words from the word index that is included at the end of printed transcripts. In addition, by eliminating these common words from the index, the indexing process precedes considerable faster and the index sizes are considerably smaller.

To view or modify the common word list for a case:

1. Click on the search icon on the main window’s toolbar to display the search window.
2. On the search window, select the ‘Search Filters’ tab.



3. Press the ‘Common Word List Button’.
4. Use the Common Word List dialog to add and remove words from the common word list.



To add a word:

1. Enter a word in the text box above the Add Word button.
2. Press the ‘Add Word’ button.

To remove a word:

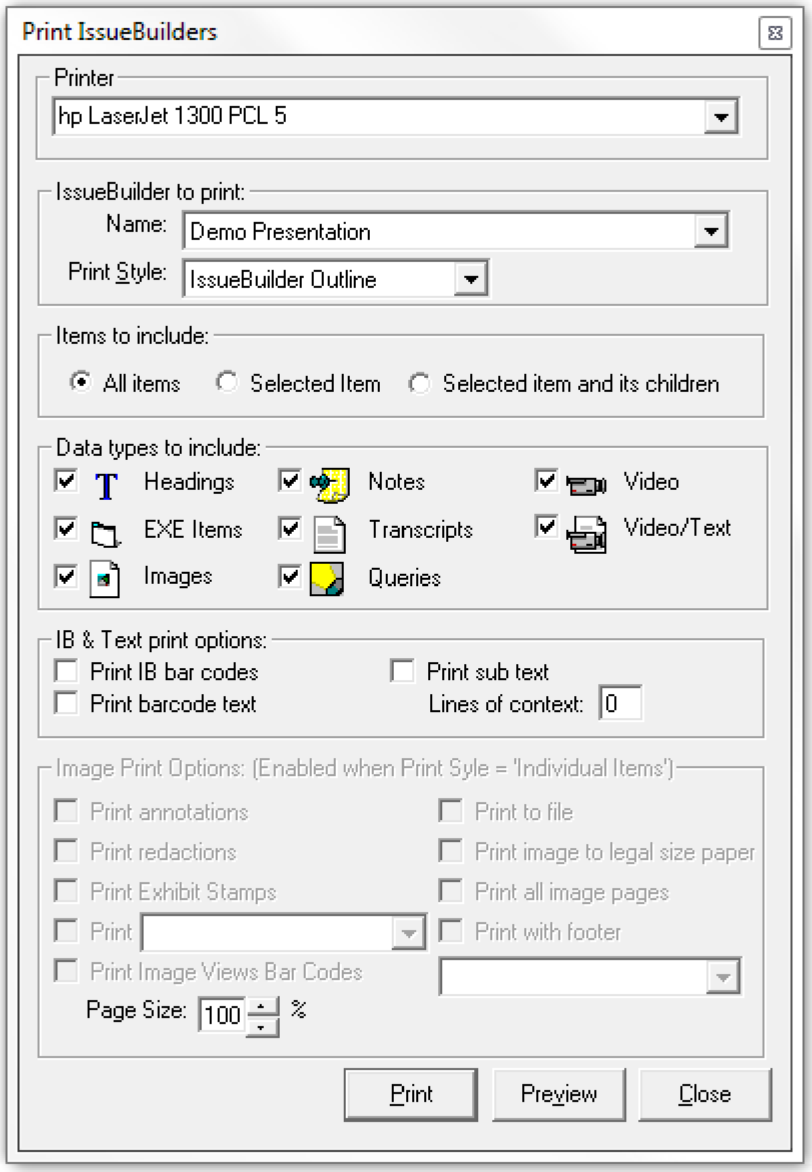
1. Select the word to be removed from the list box on the left side of the dialog.
2. Press the ‘Remove Word’ button.

Printing Transcripts, Notes, Images & IssueBuilders

Printing IssueBuilders

To print an IssueBuilder:

1. Select the ‘File / Print’ menu item on the Main Window or press the ‘Print’ icon  on the toolbar of the Main Window.
2. Select the IssueBuilder to be printed.
3. Set the following print properties as desired.



Print Style – IssueBuilder Outline Prints the IssueBuilder in an outline format that mimics what you see when viewing an IssueBuilder in Visionary.   3 X 10 prints the IssueBuilder in a bar code format suitable for printing on Avery labels. Individual Items – Prints out copies of the images and text excerpts referenced in the IssueBuilder.

Items to include – Specifies what items in the IssueBuilder will be printed. Selected Item and 'Select item and its children' only have an effect if the IssueBuilder being printed is open.

Data types to include – Specifies what IssueBuilder data types will be printed.

Print sub text – Available only when printing in Outline format. When checked, the actual text to which text or video text clips refer is printed under the respective Issue-Builder item.

Lines of context – Specifies how many additional lines will be printed before and after the text when the ‘Print sub text’ option is checked or when printing with the Individual Item Print Style.

Print bar codes – When checked, bar codes will be printed with each IssueBuilder items.

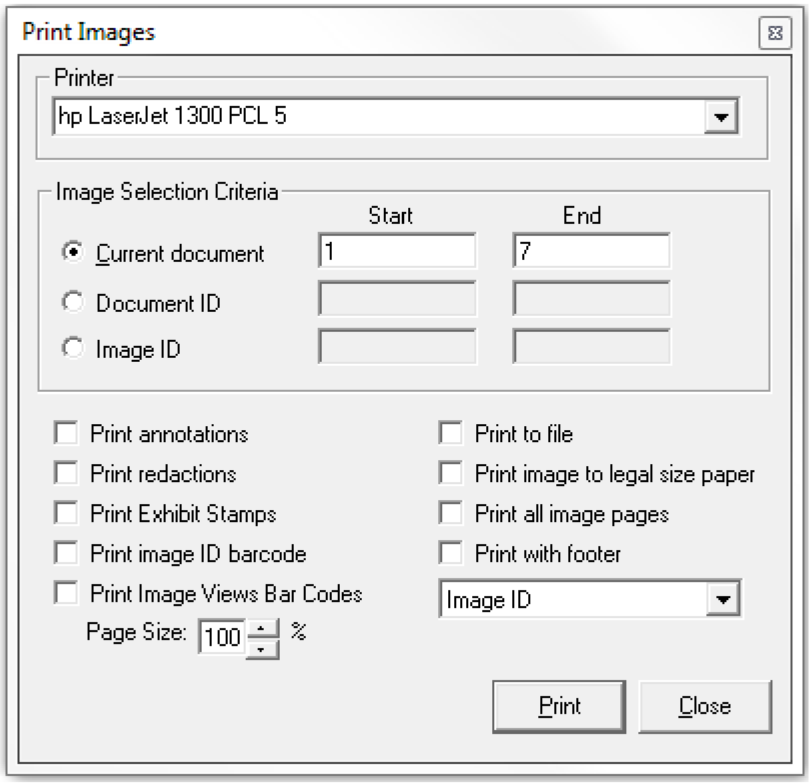
Print all image pages – Available only when the ‘Print Style’ is ‘Individual Items’. When checked, all the pages associated with a document referenced in the IssueBuilder will be printed.

4. Press the ‘Print’ or ‘Preview’ button.

Printing Images

To print a range of images:

1. Select the ‘File / Print’ menu item on the Main Window or press the ‘Print’ icon  mainscreen_IconPrint.bmp} on the toolbar of the Main Window.
2. Enter the range of images to be printed in the Image Selection Criteria area and set the other print options as required.



Print to file – Outputs the images to a file rather than a printer when the 'Print' button is pressed.

Print with annotations – Prints any annotations associated with the images. (See the Annotating Images topic)

Print with redactions – If checked, any redactions associated with images will be printed.

Print with ImageID bar code – If checked, a bar code will be printed at the bottom of each page.

Print with footer – If checked, a footer will be printed at the bottom of each page. The footer style is specified in the drop down list box below this option.

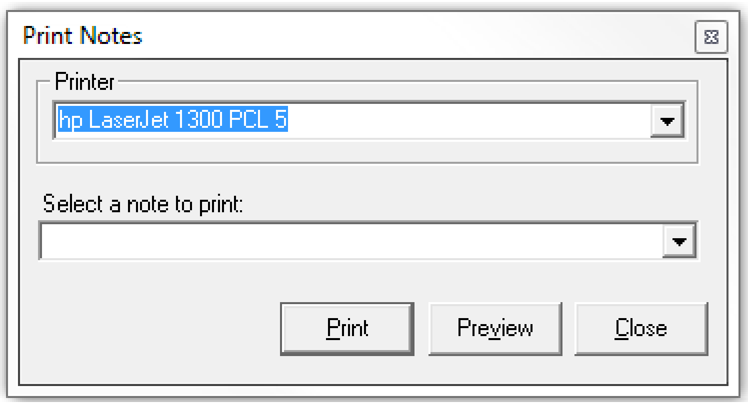
Print image to legal-size paper – If NOT checked, legal-sized documents will be reduced to 8.5 X 11.

3.Press the 'Print' or 'Preview' button.

Printing Notes

To print a note:

1. Select the ‘File / Print’ menu item on the Main Window or press the ‘Print’ icon  mainscreen_IconPrint.bmp} on the toolbar of the Main Window.
2. Select note to be printed.



Press the ‘Print’ or ‘Preview’ button.

Printing Reports

To print a report:

1. Select the ‘Reports’ menu item on the Main Window.
2. Select Report to be printed.

Bar Code Interrupts - Prints bar code labels for special bar codes that will send commands to Visionary, such as Play, Stop, Pause, Black Out Screen, and commands to step through an IssueBuilder outline. These bar codes allow you to control Visionary during court presentations without being near the computer.

IssueBuilder Listing – Prints a list of the IssueBuilders for the case.

Print Image Bar Code Report – Prints a set of bar codes for specified range of images.

Worthington Setup Bar Codes – Prints a copy of the bar codes used to configure a Worth Data bar code reader.

3. In the Report Viewing Window, press the print button on the toolbar or select the ‘File\Print’ menu item.

Creating and Viewing Database Reports

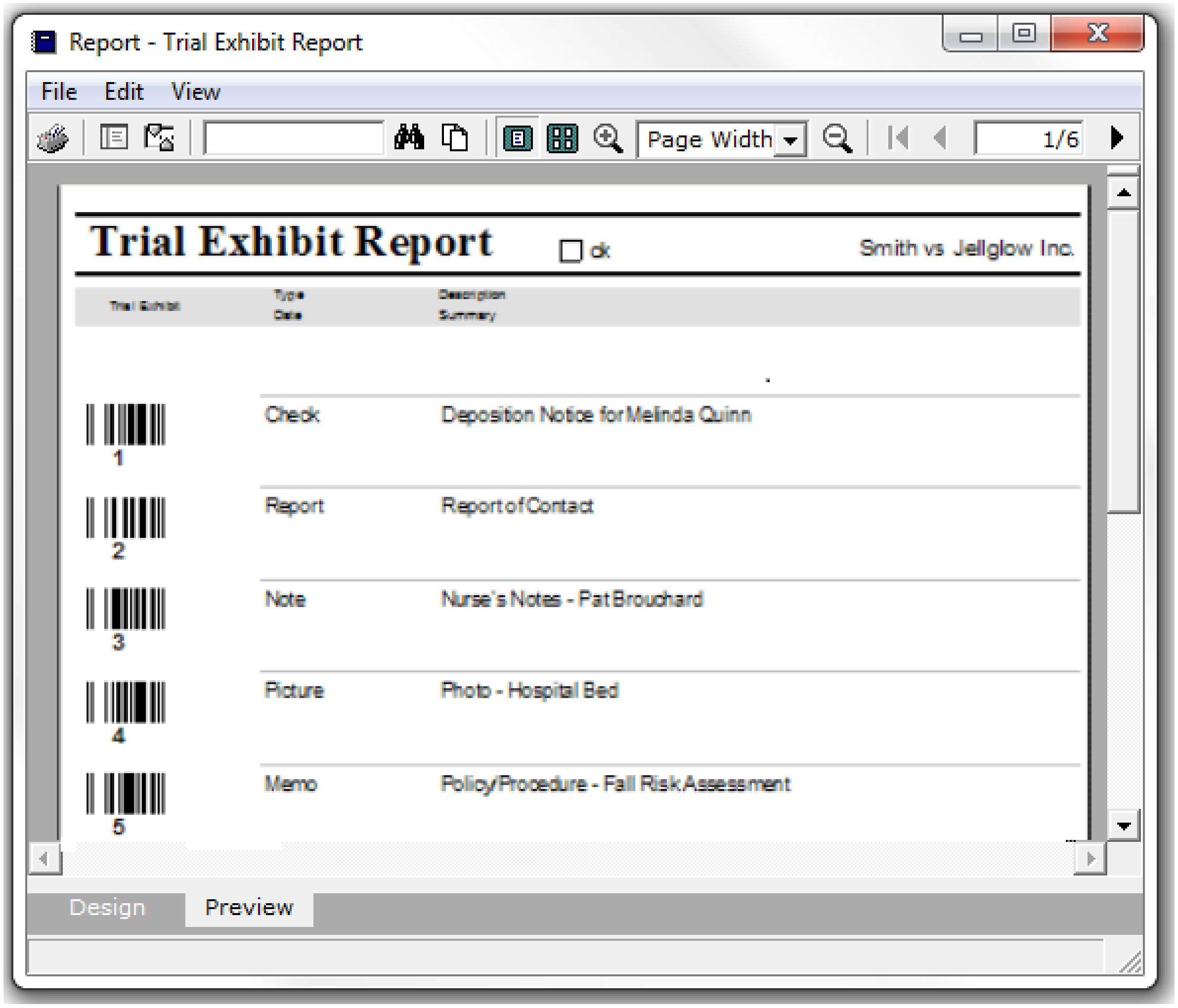
Overview

Visionary includes a robust report designer that allows users to create custom reports on the fact and document databases. It also includes a number of predefined reports that are commonly used in a case. The report design feature should be fairly intuitive to anyone that has used a database report writer like Crystal Reports™ or the one found in Microsoft Access™. However, if you have never used a report writer or are unfamiliar with basic relation database concepts, then it may be necessary for you to peruse all of the Report Designer topics.

Viewing Reports

To view a report:

1. Select the '\Reports\Custom' menu item on the Main Window.
2. Select the report that you wish to view.
3. Press the 'View' button on the Report selection dialog.



The Reports selection dialog can be displayed by selecting the ‘Reports/Custom’ menu item on the main window. Using this dialog, users can select a report to view, edit, delete or create a new report. See the corresponding toolbar buttons at the top of the window.

Creating Reports

 Note: This feature is only available in the Professional Edition.

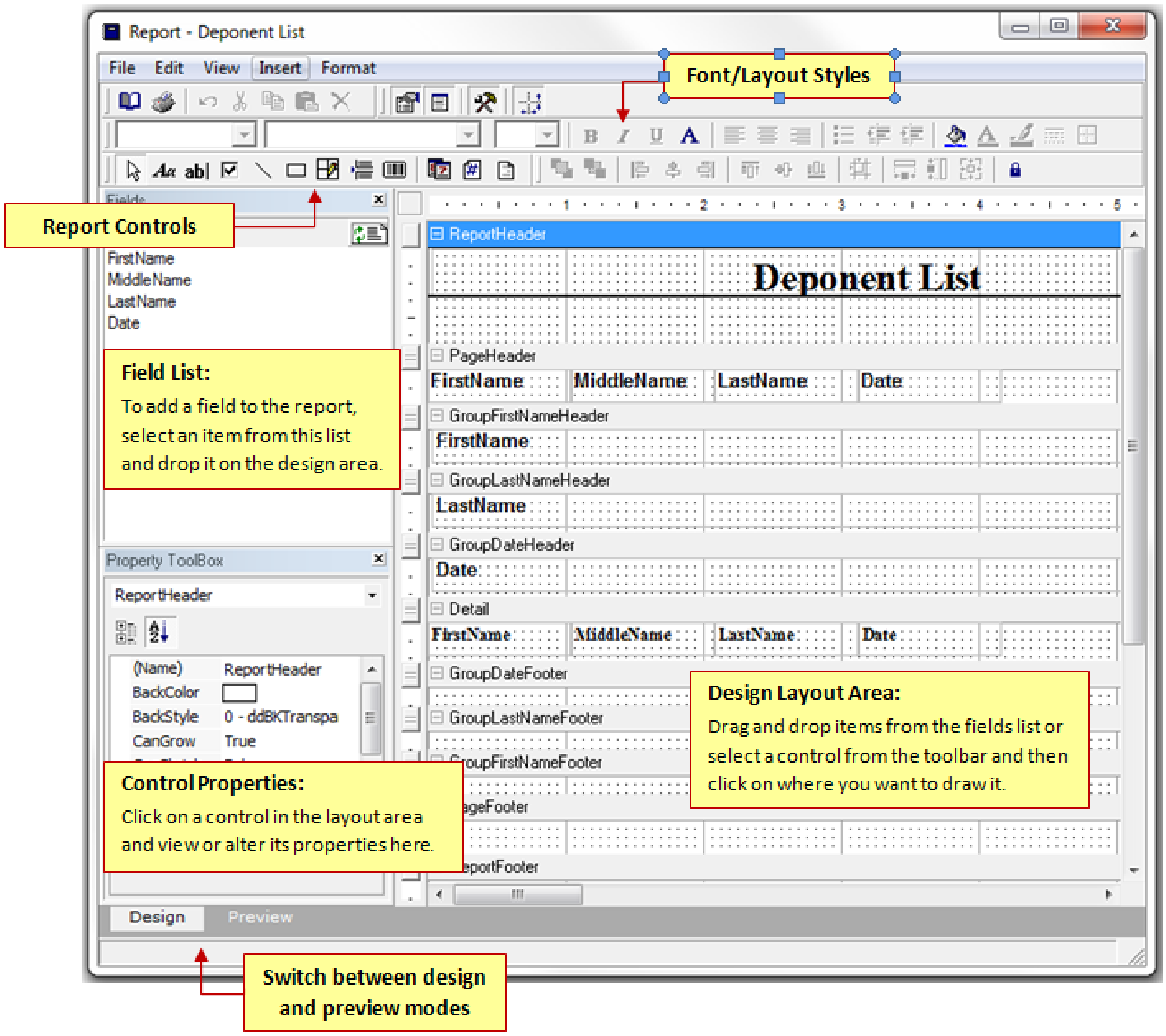
To create a new report:

1. Select the ‘\Reports\Custom Reports’ menu item from the Main Window to start the Report Wizard.
2. Press the ‘New’ button on the Report Selection dialog’s toolbar.
3. Follow the instructions of the Report Wizard to identify what records will be included in your report.
4. Check and refine the layout of the report as generated by the Report Wizard. Note that some fields may be positioned too far left to print on typical 8 ½ x 11 sheet of paper and it may be necessary to use the Report Wizard. Adjust the page orientation or field positions to achieve desired results.

Report Layout Designer

 Note: This feature is only available in the Professional Edition.

The Report Layout Designer window provides a canvas to layout custom reports. The graphic below provides a basic overview of the design window. Details on the various menu item functions are located in this topic. For information about how to perform common reporting tasks see the Design How-To's topic.



Report Controls Overview

The Report Designer provides a number of different controls that can be added to reports. An explanation of the various controls follows.

Aa Label Control. Useful for adding static text to reports such as titles. See the Label Control Properties for more information.

ab| Field Control. Displays the database field identified in the DataField property. See the Field Control Properties for more information.

☑ Checkbox Control. Used to indicate a true/false state based on the field identified in the DataField property. See the Checkbox Control Properties for more details.

Line Control. See the Line Control Properties for further details.

Shape Control. Used to draw squares, rectangles, circles, and ellipses. See the Shape Control Properties for further details.

Frame Control. See the Frame Control Properties topic for further details.

Page Break Control. Forces a page break at the specified location. See the Page Break Control Properties topic for further details.

Bar Code Control. Draws a bar code using the field value defined by the DataField property. See the Bar Code Control Properties topic for further details. NOTE: Under most circumstances, you should only set the DataField property to fields with a "BC" suffix if you want your bar codes to word reliably in Visionary's Courtviewer mode.

Insert Date. Inserts the current time and date.

Insert Page No. Inserts the page number. Normally placed in the page header or footer section of the report.

Insert Case Name. Inserts the case name.

Report Control Properties

AllowSplitter	Sets or returns whether or not the print preview can be split into two windows.
DocumentName	Sets or returns the document name for a report. The document name appears in the print spooler and can be used to easily identify the report.
MaxPages	Sets or returns the maximum number of pages Visionary's report writer will process. Once the number of maximum pages is reached, Visionary will stop processing the report.
PrintWidth	Sets or returns the report's printable width in twips (1440 twips = 1 inch).
RulerVisible	Sets or returns whether or not the report's top and side rulers are shown during run- time.
ScriptDebugger Enabled	Sets or returns whether or not the report will use an ActiveScript debugger to debug the script code.
ScriptLanguage	Sets or returns the scripting language Visionary will use to write and interpret the script properties.
ShowParameterUI	Sets or returns whether or not the query parameters dialog box will appear when the report is run.
TOCEnabled	Sets or returns whether or not the table of contents tree view is enabled when the report is shown.
TOCVisible	Sets or returns whether or not the table of contents tree view is displayed in the viewer when the report is shown.
ToolbarVisible	Sets or returns whether or not the toolbar is displayed in the preview window.
UserData	Sets or returns users specified information.
WaterMark	Adds a specified image to the report's background. The watermark image can be positioned, sized, aligned and placed on specified pages by using the other watermark properties.
WaterMarkAlignment	Sets or returns the watermark's general vertical and horizontal positions when it is added to the canvas.
WaterMarkPrintOn Pages	Sets or returns a value indicating the specific pages the watermark should be added to.
WaterMarkSizeMode	Sets or returns how the watermark will be sized when the image is rendered on the canvas.

Group Properties

BackColor	Sets or returns the background color of a section. The setting will be reflected when the BackStyle property is set to ddBKNormal.
BackStyle	Sets or returns whether the object has a transparent or normal background. Transparent background makes the objects behind the section visible.
CanGrow	Determines if the section is allowed to stretch beyond its maximum height based on its contents.
CanShrink	Determines if the section height should shrink to reflect the size of its components.
ColumnLayout	Determines if a group header or footer section should reflect the column setting of it detail.
ColumnSpacing	Sets or returns the space between columns in multicolumn report (in twips)
DataField	Applies to group header sections. It sets or returns the name of the field to use for grouping data. Visionary will start a new group whenever the value of the specified field changes in the data set.
GrpKeepTogether	Applies to group header sections. Determines if the group can be separated from its detail section.
NewColumn	Determines whether the section should be preceded or followed by a column break, i.e., cause the start or end of a column. Does not apply to PageHeader or PageFooter sections.
NewPage	Determines whether the section should be preceded or followed by a page break, i.e., cause the start or end of a page. Does not apply to PageHeader or PageFooter sections.
Repeat	Determines whether a group section should be repeated at the beginning of a new page if its detail was split across pages.
UnderlayNext	Determines whether the section should print underneath the following section. The following section will start printing beginning from the top coordinate of the section instead of the bottom coordinate.
Visible	Determines whether the section is visible; non- visible sections are not printed.

Field Control Properties

Alignment	Determines how the value should be printed relative the left, center and right edges of the field.
BackColor	Sets or returns the background fill color of the field.
BackStyle	Sets or returns the transparency of the field.
CanGrow	When set to True, the field area will grow vertically to fit the text. Otherwise, the text will be clipped to the preset size of the field.
CanShrink	When set to True, the field will shrink to fit the text.
ClassName	Sets or returns the controls name.
DataField	Sets or returns the name of the bound field.
Font	Sets or returns the font properties used to print the value of the field.
ForeColor	Sets the font color used to print the value of the field.
HyperLink	Sets or returns a hyperlink for a field. Once a hyperlink is set, users can follow the specified link by clicking on the field at run - time
Multiline	Determines whether the contents of the field are printed on a single line or multiple lines.
OutputFormat	Sets or returns the formatting string used to translate the data value of the field to its printed text value.
Style	Sets or returns a style string for the field. The style string can be used to specify a particular appearance for each field.
SummaryDistinctField	Sets the field name that should be used in calculating distinct summary functions.
SummaryDistinctValue	Sets a value that is used to calculate unbound distinct summary functions.
SummaryFunc	Sets the type of summarization to be calculated for the specified field.
SummaryGroup	Specifies the summarization group level. This property is ignored if the SummaryType is not a group level summary.
SummaryRunning	Specifies the type of running summarization to be used.
SummaryType	Specifies the level of summarized to be used.
Text	Sets or returns the formatted value of the field to be printed.
VerticalAlignment	Determines how the value should be printed relative to the top, middle, and bottom of the field.
WordWrap	Sets or returns whether or not a field's text will wrap.
ZOrder	Sets or returns the order, front or back, for the controls. Changing the control's ZOrder allows controls to be positioned behind or in

front of other controls.

Label Control Properties

Alignment	Determines where the caption should be printed relative the left, center and right edges of the label.
Angle	Sets or returns the angle (slope) of the printed value. 1 = 1/10 degree.
BackColor	Sets or returns the background fill color of the label.
BackStyle	Sets or returns the transparency of the label.
Caption	Sets the value to be printed.
ClassName	Sets or returns the controls global style. The global styles are specified in the styles dropdown window.
Font	Sets or returns the font properties used to print the value of the label.
ForeColor	Sets the font color used to print the value of the label.
Hyperlink	Sets or returns a hyperlink for a label. Once a hyperlink is set, users can follow the specified link by clicking on the label at run – time.
Multiline	Determines whether the label prints as a single line or expands to multiple lines.
Style	Sets or returns a style string for a label. The style string can be used to specify a particular appearance for each label.
VerticalAlignment	Determines how the value should be printed relative to the top, middle, and bottom of the label.
WordWrap	Sets or returns whether or not the label's caption will wrap. When WordWrap is set to False, "white- space:nowrap" will appear in the Style property window. If the label's caption is longer than the label's width, the text will be truncated.
ZOrder	Sets or returns the order, front or back, for the controls. Changing the control's ZOrder allows controls to be positioned behind or in front of other controls.

Line Control Properties

LineColor	Sets or returns the drawing color.
LineStyle	Sets or returns the style color.
LineWeight	Sets or returns the thickness of the line.
X1	Sets the horizontal coordinate of the line's starting point.
X2	Sets or returns the horizontal coordinate of the line's ending point.
Y1	Sets or returns the vertical coordinate of the line's starting point.
Y2	Sets or returns the vertical coordinate of the line's ending point.
ZOrder	Sets or returns the order, front or back, for the controls. Changing the control's ZOrder allows controls to be positioned behind or in front of other controls.

Shape Control Properties

BackColor	Sets or returns the background color of the object. This property is ignored if the BackStyle is set to transparent.
BackStyle	Sets or returns the transparency of the object.
LineColor	Sets or returns the line color of the border around the object.
LineStyle	Sets or returns the line style of the border around the object.
LineWeight	Sets or returns the line thickness of the border around the object.
Shape	Sets or returns the shape type, ellipse, rectangle or rounded rectangle.

Frame Control Properties

BackColor	Sets or returns the background fill color of the frame.
CanGrow	When set to True, the frame area will grow vertically to fit the text. Otherwise, the text will be clipped to the preset size of the frame.
CanShrink	When set to True, the frame will shrink to fit the text.
CloseBorder	Sets or returns if the border is closed.
ZOrder	Sets or returns the order, front or back, for the controls. Changing the control's ZOrder allows controls to be positioned behind or in front of other controls.

Page Break Control Properties

Enabled Sets or returns whether or not the page break is activated.

Bar Code Control Properties

Alignment	Sets or returns the position the barcode's readable caption will have relative to the barcode's left, center and right edges.
BackColor	Sets or returns the barcode's background color or fill color.
BarWidth	Sets or returns the width, in pixels, for the barcode's narrow bars.
Caption	Sets or returns the barcode's caption.
CaptionPosition	Sets or returns the type of vertical alignment the barcode's caption will have.
DataField	Sets or returns the field the control will be bound to.
Direction	Sets or returns the barcode's direction horizontally or vertically.
EnableCheckSum	Sets or returns if checksum value is used when rendering barcode. Setting EnableCheckSum to false will only affect codes with check-sum values.
Font	Sets or returns the font properties used to print the caption.
ForeColor	Sets the font color used to print the barcode.
Style	Sets or returns the type of code, or symbology, the barcode control will use to generate the barcodes. Code 39 and 128 are the most commonly used. Code 128 is slightly more compact.

Checkbox Control Properties

Alignment	Sets or returns the alignment of text within the object area.
BackColor	Sets or returns the background color of the object. This property is ignored if the BackStyle is set to transparent.
BackStyle	Sets or returns the object transparency setting.
Caption	Sets or returns the printed caption of the checkbox.
Font	Sets or returns the font properties of the object.
ForeColor	Sets or returns the foreground color of the print font.
Style	Sets or returns a style string for the specified checkbox. The style string can be used override a global style or set a particular style for the specified check-box.
Value	Sets or returns the value of the checkbox, checked or not checked.

Adding Bar Codes

To add a bar code to a report:

1. In the Report Layout Designer, select the bar code control from the report controls toolbar.
2. Draw a rectangle on the design area. This will insert the bar code control.

Note: by default, the BackColor of the Bar Code control and the report window are white, which can make it difficult to see exactly where the bar code control is placed. It may be useful to temporarily modify the BackColor of the Bar Code control while designing the report.

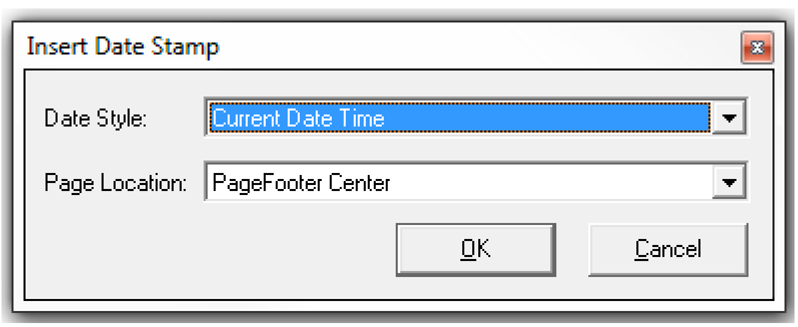
3. Set the DataField property. If you are using the bar codes in Visionary's Courtviewer mode it is important to only select fields that end with 'BC'. These fields contain the load prefix required by Visionary in Courtviewer mode. See Load Prefixes for further details.
4. Select style. The bar code style. Code 128 A or Code 39 are the most commonly used styles, but you may use any style supported by your bar code reader.

See Also: Bar Code Control Properties

Adding Current Date

To add the current date to a report:

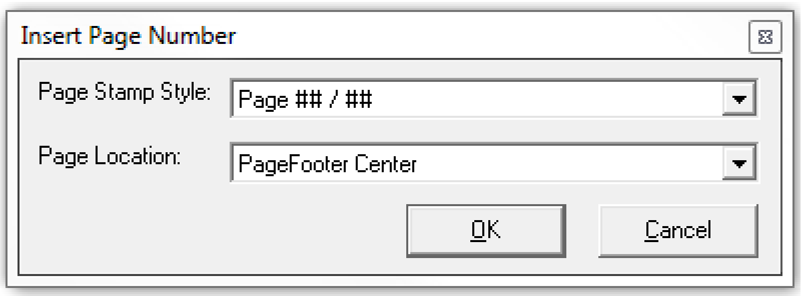
1. In the Report Layout Designer, select the Insert Date button on the report controls toolbar.
2. In the Insert Date Dialog, select the report section where the date should be inserted and the date format.



Adding Page Numbers

To add the current date to a report::

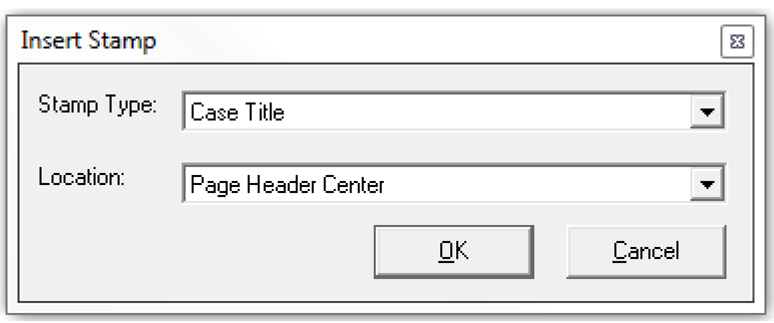
1. In the Report Layout Designer, select the Insert Date button on the report controls toolbar.
2. In the Insert Date Dialog, select the report section where the date should be inserted and the date format.



Adding Text Stamps

To add a text stamp to a report:

1. In the Report Layout Designer, select the Insert Date button on the report controls toolbar.
2. In the Insert Date Dialog, select the report section where the date should be inserted and the date format.



Adding Fields

To add a field using the field control:

1. Select the Field control ab| on the report controls toolbar.
2. Draw a rectangle on the design area. This will insert the bar code control. Most fields need to be added to the details section of the report, though it is sometimes appropriate to add fields in a group section of the report.

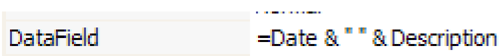
3. Set the DataField property. See Modifying Report Control Properties for further details.

To add a field using the field list:

1. If the field list isn't visible, select the '\View\Fields' menu item.
2. Select a field in the field list and drag it over and release it in the layout area.

To concatenate two fields:

1. Manually type the fields that you want to combine.



See also: Field Control Properties

Grouping Data

To create a new report group level:

1. Select the 'Insert\Group header\footer' menu item.
2. Click anywhere in the newly created Group Header area.
3. Select the field that you wish to grout one by setting the DataField property for the Group Header.

See Also:Section Properties

Parameter Queries

Parameter queries provide a mechanism for allowing users to specify values when a report is viewed without the need to edit the report's design. See Example 4 in the Report Wizard: Record Criteria topic for further details.

Copying Reports Between Cases

The reports created in Visionary are stored either with the Visionary program files (i.e. c:\program files\visionary\reports) or with the case databases (i.e. z:\vs_data\m-ycase\reports). Should you ever create a set of reports in one case and desire to use them in another case, simply use Windows Explorer or My Computer to manually copy the flies from one case's 'Reports' folder to another.

Using a Report as a Template

To use one report as a template for a new report:

1. Open the report to be used as the template for the new report.
2. Select the 'File\Save As' menu item.
3. Enter the file name and select where the report should be saved. Then press 'Ok'. This will create a new report that is ready for editing.

Modifying Report Control Properties

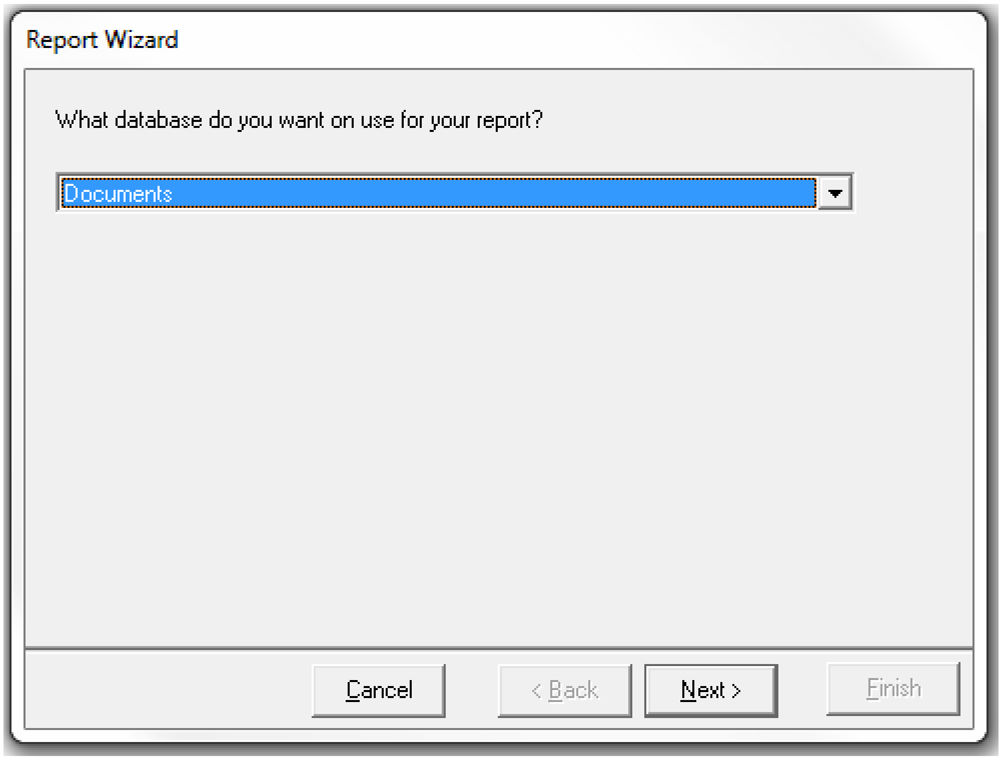
To modify the properties of a report control:

1. Select the control to be modified.
2. If the properties list isn't visible, select the '\View\Properties menu item.
3. Select the property to be modified and make the change.

See Also:Report Controls Overview

Report Wizard: Select Data Source

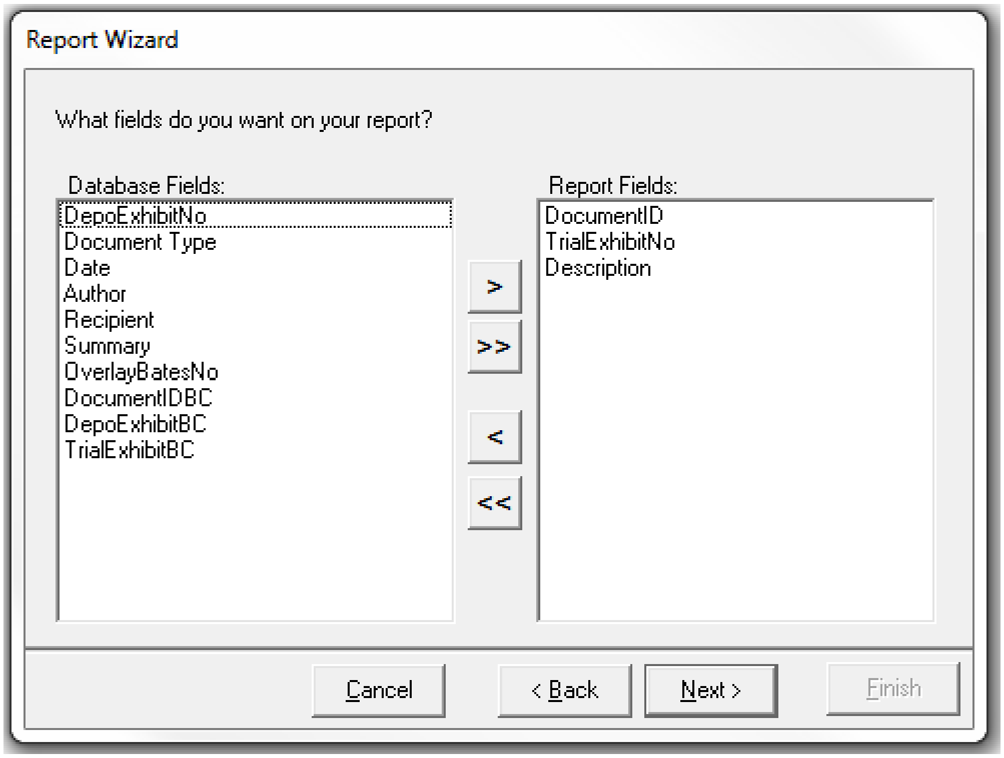
Select Data Source Select Fields Grouping Sorting Layout Style Record Criteria Naming Reports



The first step of the Report Wizard asks you to select the database that you wish to use to generate your report. Below is a list of the possible data sources and an explanation as to what information they contain:

- Document – Contains all the fields viewed in the Document Database window.
- Document Page – Contains all the document database fields as well as the page-level descriptions.
- Depositions - Provides a list of depositions.
- Depositions Video – Provides a list of the depositions and their associated video files.
- Facts – Contains all the fields viewed in the Facts Database window.

Report Wizard: Select Fields



This step in the Report Wizard asks you to define which records you are going to include in the report. Unnecessarily including fields that won't be used will result in slower performance.

To add a field:

Double click on a field in the 'Available Fields' list box.

Or

Select one or more fields and press the '>' button.

To add all the fields:

Press the '>>" button.

To remove a field:

Double click on the field to be removed from the 'Included Fields' list box.

Or

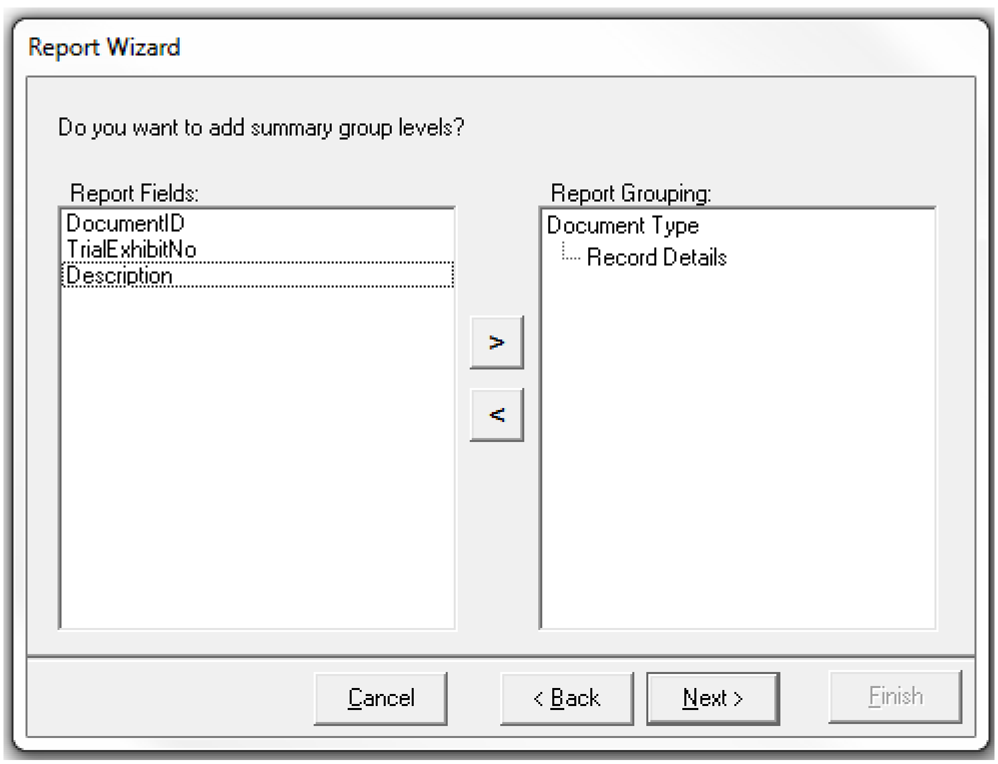
Select one or more fields and press the ‘<’ button.

To remove all the fields:

Press the ‘<<’ button.

Report Wizard: Grouping

Select Data Source Select Fields Grouping Sorting Layout Style Record Criteria Naming Reports



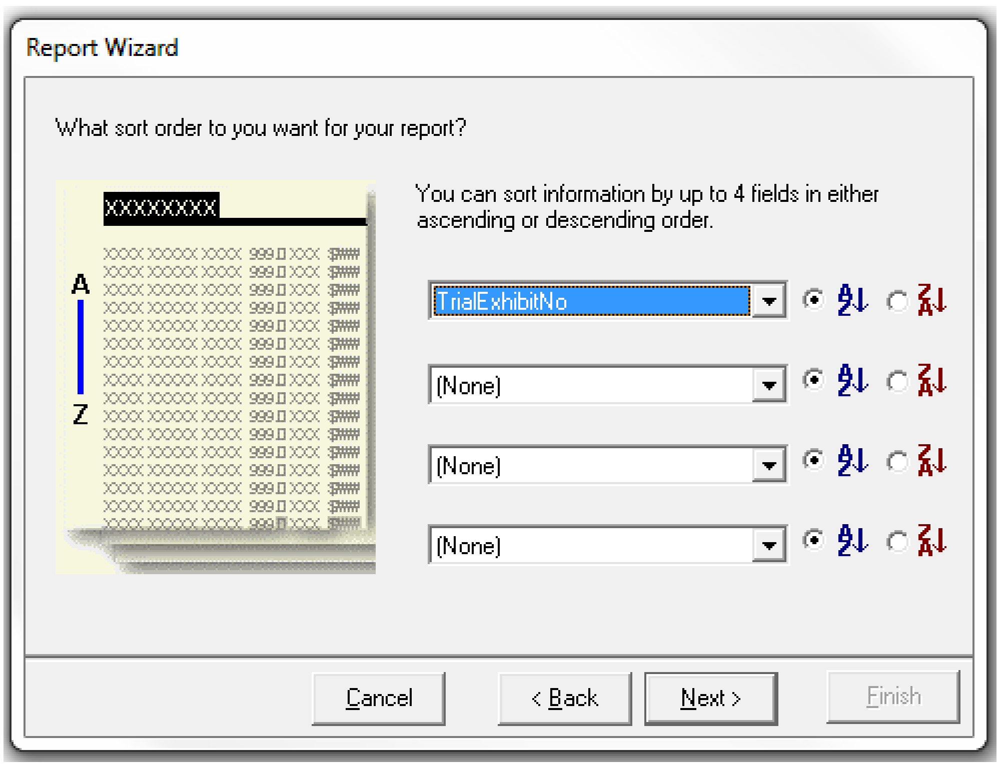
The field-grouping step provides a mechanism for data to be grouped in a hierarchy. For example, you could elect to organize all the documents by Author and then Document Type.

Use the ‘<’ and ‘>’ buttons to add and remove fields from the grouping hierarchy. Use the up and down buttons to change the hierarchy order.

Note: To add grouping to your report in the Report Designer, see the Grouping Data topic.

Report Wizard: Sorting

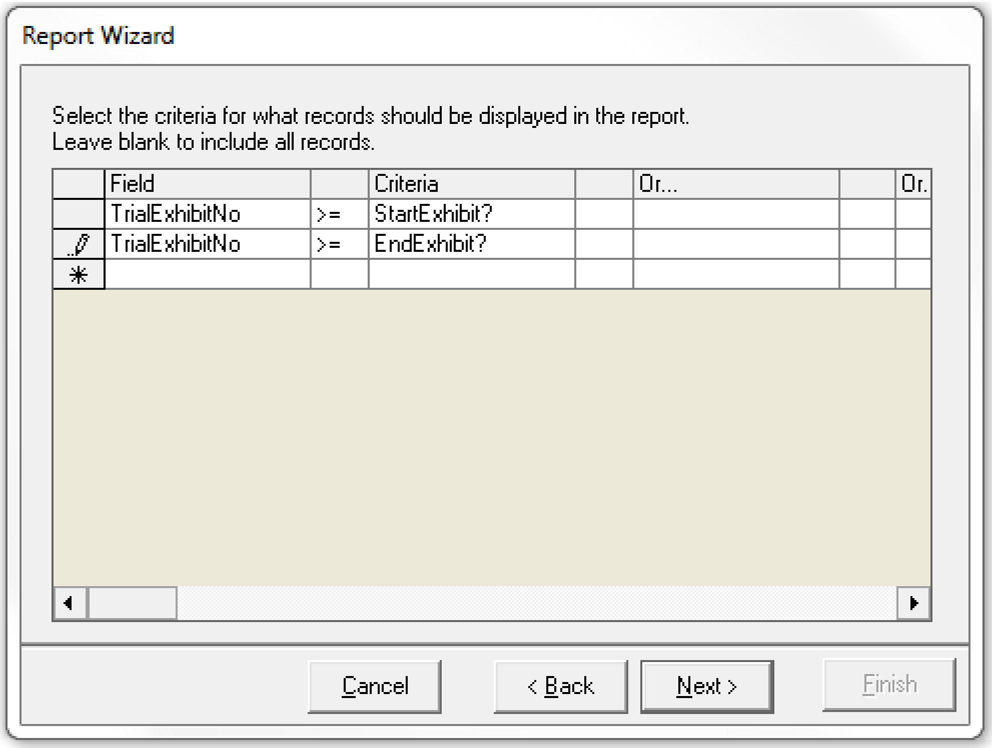
Select Data Source   Select Fields   Grouping   Sorting Layout Style Record Criteria
Naming Reports



The Sort Order step of the Report Wizard allows you to sort the report using up to four records. The option boxes to the left of the field selection drop down list box allow you to sort records in descending or ascending order. It is often useful to sort on the same fields that are grouped.

Report Wizard: Record Criteria

Select Data Source   Select Fields   Grouping   Sorting Layout Style Record Criteria
Naming Reports



The Record Criteria step enables you to define what records will be included in the report. Examples of how to define queries are defined below.

Example 1: Include all the defense documents (which have a prefix of ‘dex’)

Field		Criteria		Or...
DocumentID	>=	dex00001		
DocumentID	<=	dex99999		

Example 2: Include all the Letters and Memos authored by Smith

Field		Criteria		Or...
Type	=	Memo	=	Letter
Author	=	Smith		

Example 3: Include all Letters and memos between two user specified dates

Field		Criteria		Or...
Type	=	Memo	=	Letter
Date	>=	StartDate?		
Date	<=	EndDate?		

Note the question mark '?'. This means that rather than look for a value of 'StartDate' or 'EndDate', the user will be prompted to enter a "StartDate:" and "EndDate" values when the report is run.

Report Wizard: Layout Style

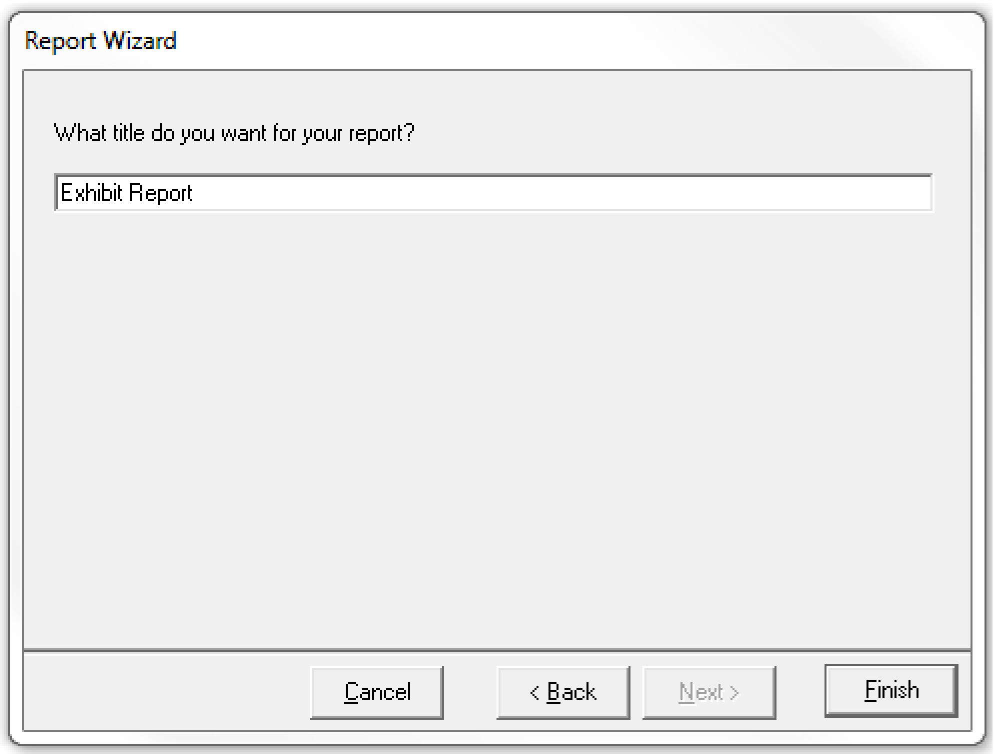
Select Data Source   Select Fields   Grouping   Sorting Layout Style Record Criteria Naming Reports

The Layout step allows you to set the basic look to the report. You can also modify this look manually in the Report Layout Designer.

 Note: The Report Wizard organizes the fields in a basic manner, and users may need to refine things such as field sizes and positions.

Report Wizard: Naming Reports

Select Data Source   Select Fields   Grouping   Sorting Layout Style Record Criteria
Naming Reports



The last step of the Report Wizard asks you to give the report a name. This name will be used to name the actual report layout file that is saved on your computer as well as appear at the top of the report. This step also asks you to identify where the report should be saved. You have the option of saving this report inside your case folder, which will allow anyone who accesses this case to access the report, or you may save it to your local hard drive, which will allow you to use this report in other cases.

After this step, Visionary will open the Report Designer Window.

Presentations

Overview

Visionary contains a robust set of features for creating effective trial presentations. Generally, there are two styles of presenting information. The first is a scripted style where items are displayed on the screen in a specific order. Visionary's IssueBuilder presentation scripting features allow items to be played back in a linear sequence similar to PowerPoint. Items can be precisely positioned on the screen, screen elements can be moved based upon a time or frame trigger, and user defined titles can also be added. The second style is an ad hoc style where everything is brought up on the fly. When working this way, transcript clips, video clips, user notes, images (both annotated and non-annotated), and other data can be located and displayed in seconds. Visionary's Objection Editor, Image View, and Dual Screen capabilities make it the easiest and most robust product on the market when you need to get a piece of information on the presentation screen quickly.

Here is a list of some of the topics related to the trial presentation features of Visionary:

Ad Hoc Display of Images

Ad Hoc Display of Transcripts

Ad Hoc Display of Video

Scripted Presentations

Screen Overview: Single Screen

Visionary's single screen CourtViewer mode provides the ability to display images and IssueBuilder clips without ever leaving the Presentation Screen. In addition, using the pop-out toolbars located at the sides and bottom of the Presentation Window and Shortcut Keys, you are able to control the video playback, select image annotations, do screen captures, track exhibits, load IssueBuilder items and load images. Although you should use the Dual Screen presentation features whenever possible, Visionary is perfectly capable of producing first class results when configured for single screen use. In addition, the use of a hardware switch that can black out the screen viewed by the judge and jury can be used to mimic Visionary's use in dual screen mode.

See Also: Screen Overview: Dual Screen

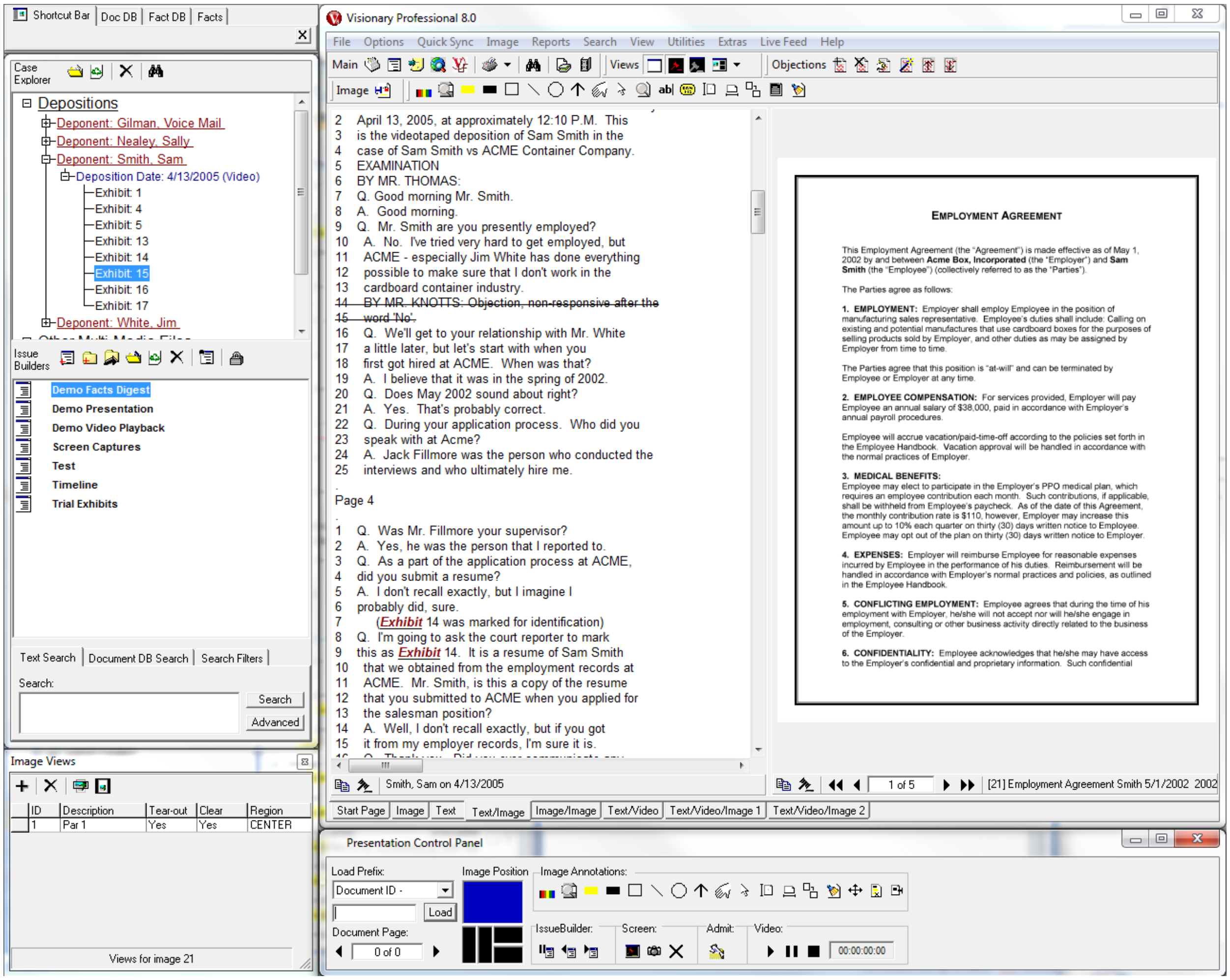
Screen Overview: Dual Screen

Visionary's dual screen CourtViewer view maximizes presentation effectiveness by minimizing the amount of work that the judge and jury see being done to present information.

With dual screen, there's no need for pop-out toolbars and the amount of mouse movement across the screen is minimized. In addition, presentation mode also gives you the flexibility of searching, preparing and previewing data before it is displayed, while the judge and jury are simultaneously reviewing information. Without question, this is the preferred method of presenting in a trial setting because it simplifies the effort required to put on a first-rate presentation.

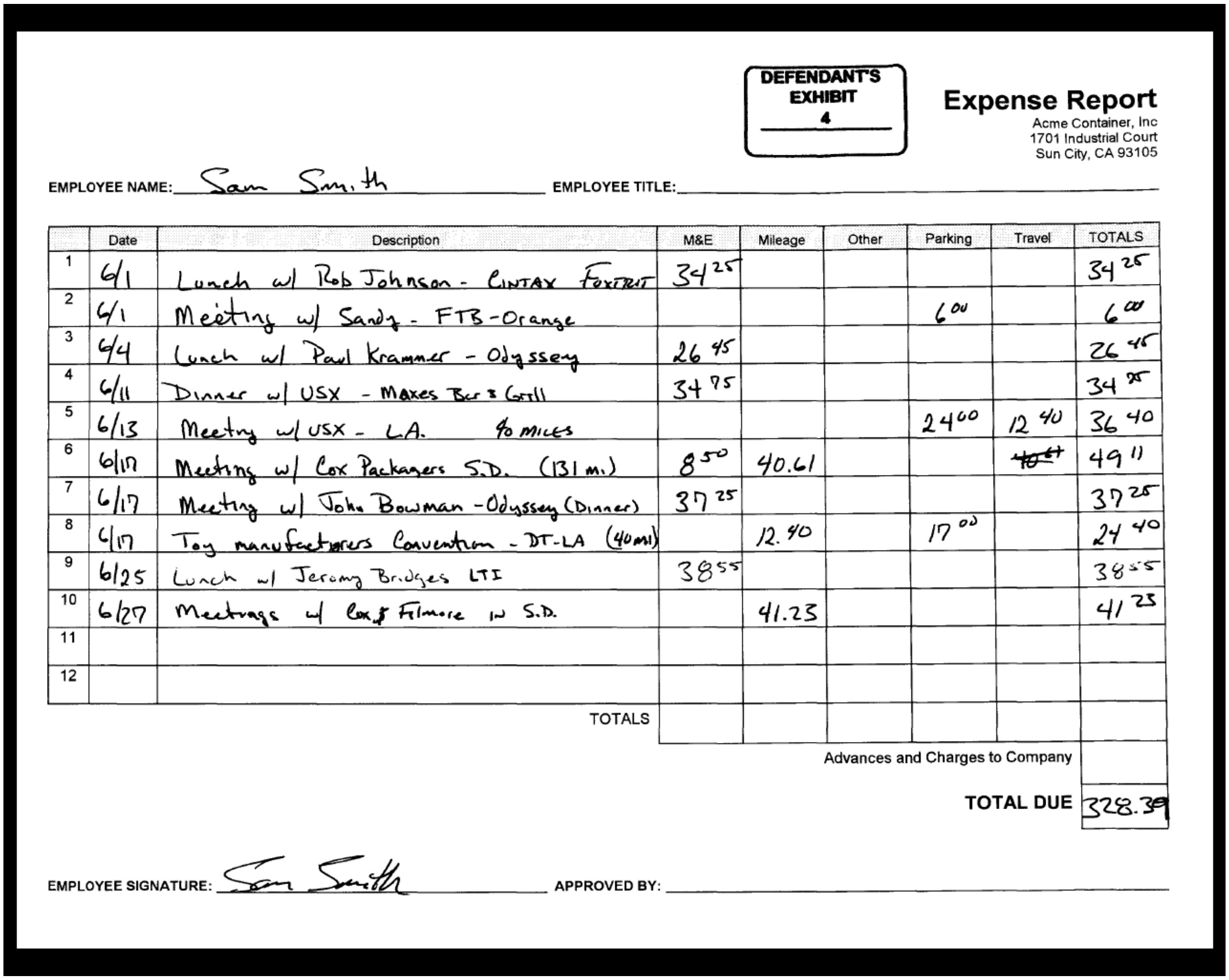
When configured for dual screen mode, the person operating the Visionary software can typically see the Main Window (workbench mode) and the CourtViewer presentation window. In addition, he or she also sees the Presentation Control Window, which provides a centralized area for controlling what is seen in the Presentation Window. The judge and jury, however, only see the CourtViewer window. Many laptops support this feature out of the box and desktops can be configured to support this feature with the addition of a second graphics card. The graphic blow simulates what is seen. Note that as your mouse moves off of one screen it will appear on the other.

OPERATOR VIEW



While the judge and jury are viewing a document, transcript clip, or image, you can be searching and previewing the next item to be displayed.

Judge & Jury View



DEFENDANT'S EXHIBIT 4

Expense Report
Acme Container, Inc
1701 Industrial Court
Sun City, CA 93105

EMPLOYEE NAME: Sam Smith EMPLOYEE TITLE:

	Date	Description	M&E	Mileage	Other	Parking	Travel	TOTALS
1	6/1	Lunch w/ Rob Johnson - CINTAX Foxtrot	34.25					34.25
2	6/1	Meeting w/ Sandy - FTB-Orange				6.00		6.00
3	6/4	Lunch w/ Paul Krammer - Odyssey	26.45					26.45
4	6/11	Dinner w/ USX - Maxes Bar & Grill	34.75					34.75
5	6/13	Meeting w/ USX - LA. 40 miles				24.00	12.40	36.40
6	6/17	Meeting w/ Cox Packagers S.D. (131 mi.)	8.50	40.61			~~40.61~~	49.11
7	6/17	Meeting w/ John Bowman - Odyssey (Dinner)	37.25					37.25
8	6/17	Toy manufacturers Convention - DT-LA (40mi)		12.40		17.00		24.40
9	6/25	Lunch w/ Jeromy Bridges LTI	38.55					38.55
10	6/27	Meetings w/ Cox & Filmore in S.D.		41.23				41.23
11								
12								
		TOTALS						

Advances and Charges to Company

TOTAL DUE 328.39

EMPLOYEE SIGNATURE: Sam Smith APPROVED BY:

The judge and jury's attention isn't distracted by pop-out toolbars or excessive mouse movements.

 Note: Although this feature can be used on Windows XP, Vista and Windows 7; experience has shown that it is often most easily configured as the operating system level with Windows XP.

To use the dual screen features in Visionary, you must configure both your computer and Visionary to recognize the second screen. See the topics below for further information.

How to Configure a Computer for Dual Screen

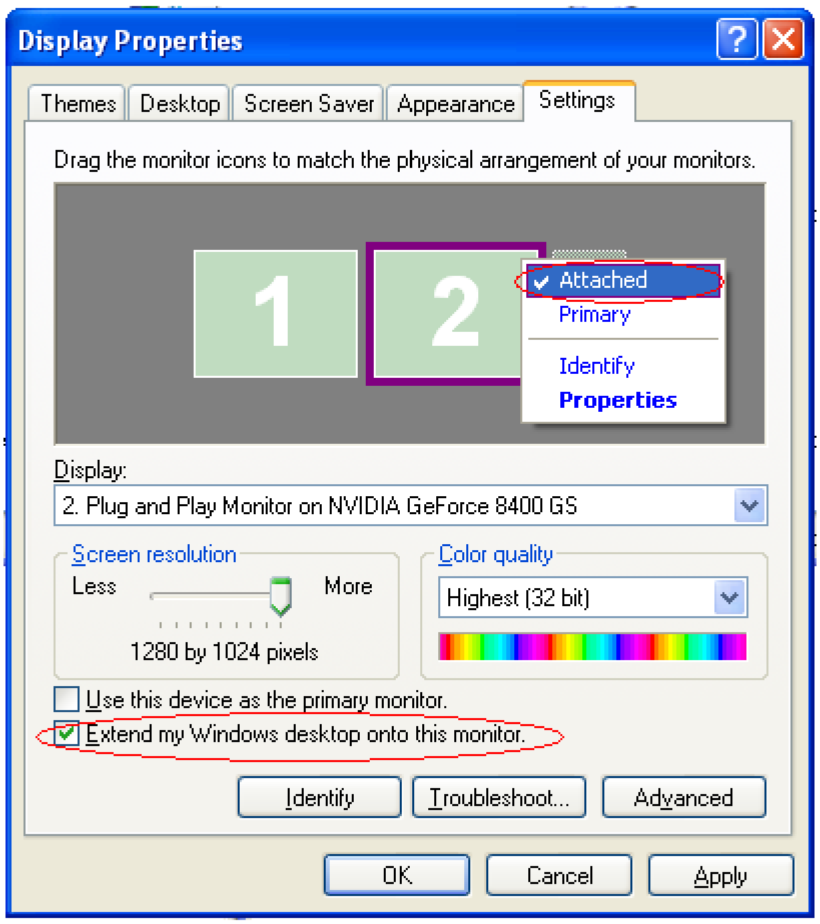
Configuring Visionary for Dual Screen

How to Configure a Computer for Dual Screen

Note: The procedure described below can vary slightly from computer to computer due to differences in hardware and software drivers.

To configure a computer for dual-screen use:

1. Select ‘Screen’ in the Windows Control Panel.
2. Select the ‘Settings’ tab on the display properties dialog.



3. Right mouse click on the second monitor to display a popup menu and check the ‘Attached’ menu item.
4. Check the ‘Extend my desktop to this monitor’ option.

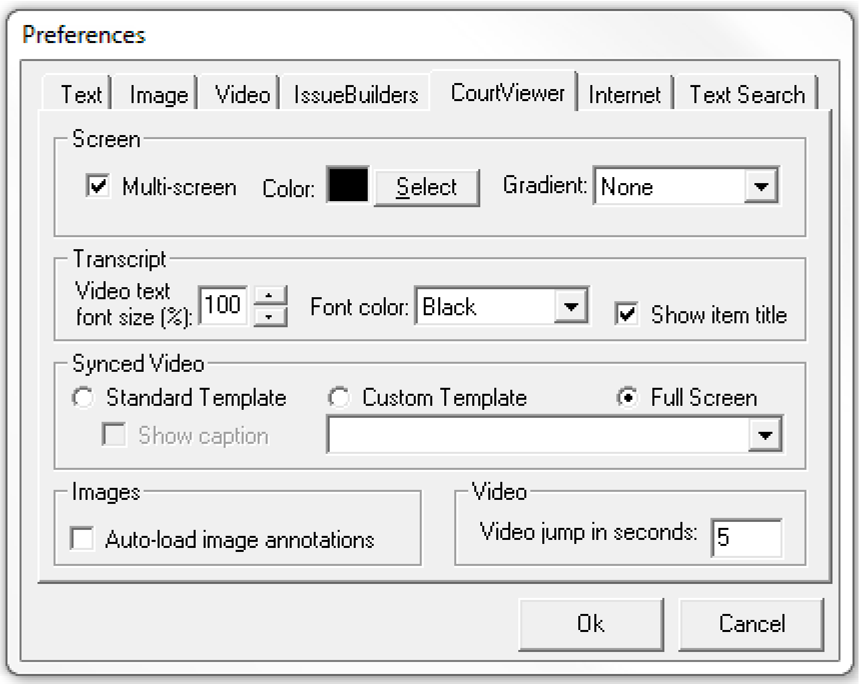
Configuring Visionary for Dual Screen

Note: Your computer must be configured to support dual screen views before Visionary can be configured to support dual screen views. See the How to Configure a

Computer for Dual Screen topic for further details.

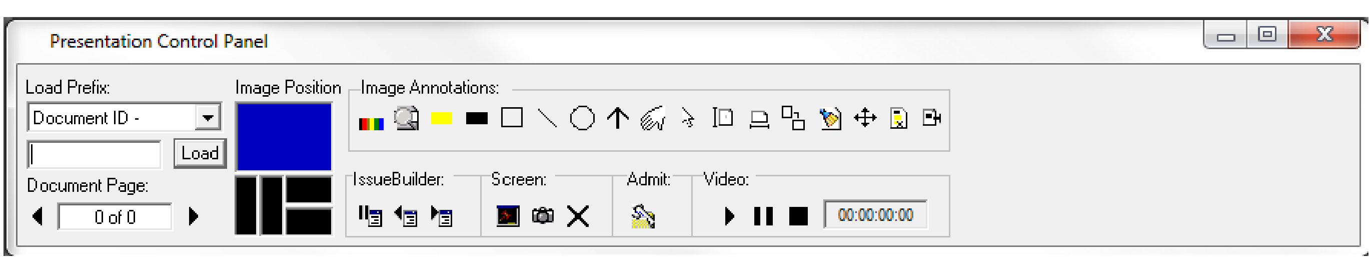
To configure Visionary to support dual-screen use:

1. Select the ‘Options / Preferences’ menu item on the Main Window.
2. Select the ‘CourtViewer’ tab.
3. Select the ‘Multi-Screen’ option on the ‘CourtViewer’ tab of the Preferences Window.
4. Press ‘Ok’.



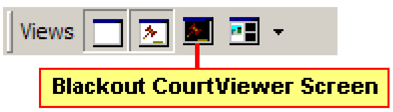
Presentation Control Window

The Presentation Control Window is designed to exploit the dual screen capability built into many computers by providing the ability to configure CourtViewer settings off screen without the need to use any shortcut keys. An explanation of the various features contained in the Control Window are outlined in the graphic below.



To display the Presentation Control Window:

1. Make sure that your computer is configured for dual screen use. See the How to Configure a Computer for Dual Screen topic for more information.
2. Make sure that Visionary is configured to use dual screens by selecting the ‘Use multi-screen setup’ option on the ‘CourtViewer’ tab of the Preferences Window. (Use the ‘Options / Preferences’ menu item on the Main Window to display the Preferences Window.)



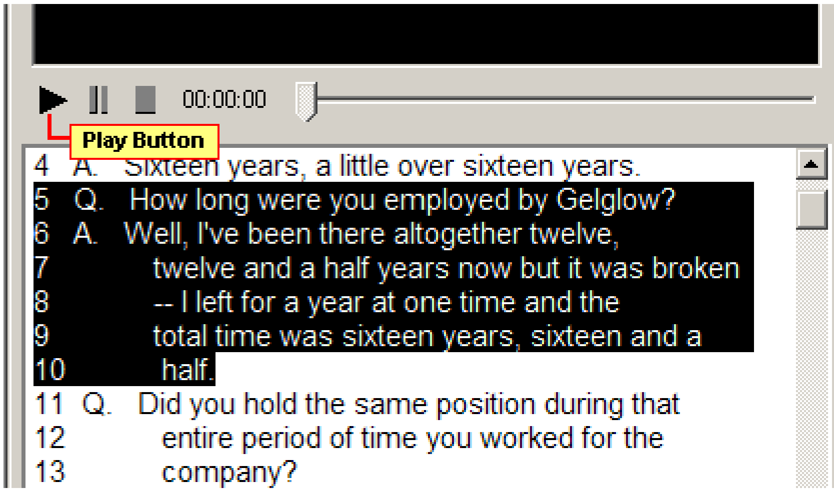
3. Put Visionary into CourtViewer mode by clicking on the CourtViewer icon on the Main Window’s toolbar or by selecting the ‘Options / CourtViewer’ mode menu item on the Main Window.

Note: The Presentation Control Window can only be displayed when configured for dual screen display. If you system does not support dual screen display, then you should use the pop-out toolbars and shortcut keys on the CourtViewer window to perform the tasks managed by the Presentation Control Window.

Ad Hoc Display of Video

To display a video clip in an ad hoc fashion:

1. Switch to a view that displays both text and video. (See Screen Views topic.)
2. Load a synchronized transcript in the Main Window.
3. Select the portion of text that you wish to play.
4. Press the play button or right mouse click and select the ‘Play Video’ item from the popup menu.

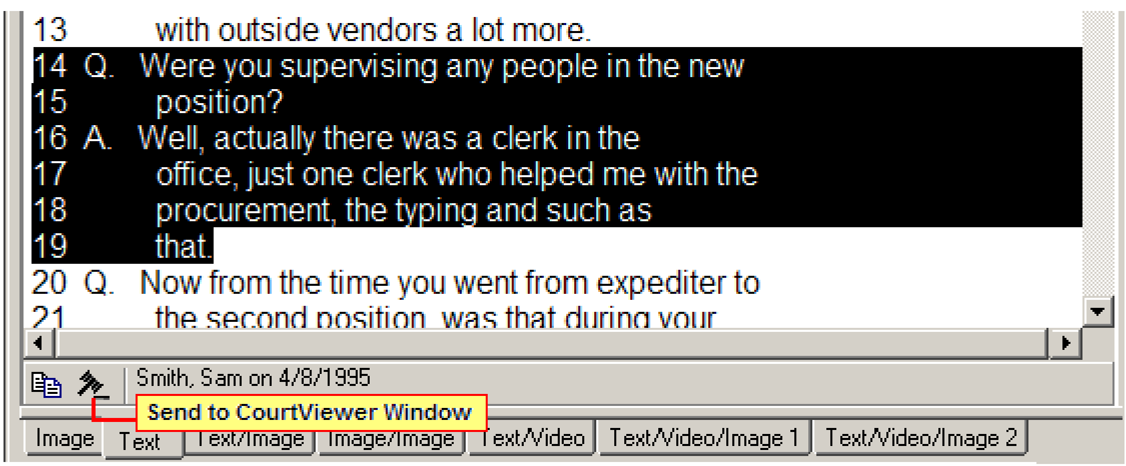


See Also:Objection Editor

Ad Hoc Display of Transcripts

To display a transcript clip in an ad hoc fashion:

1. Load a transcript in the Main Window.
2. Select the portion of text that you wish to display.
3. Press the ‘Send to CourtViewer’ icon located below the transcript display region.

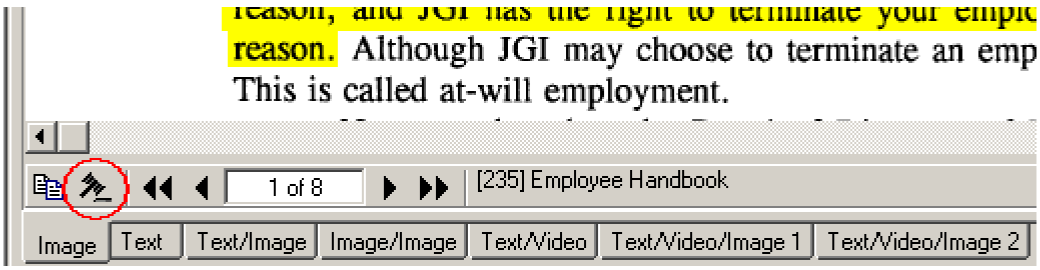


Ad Hoc Display of Images

Visionary provides numerous mechanisms for loading images into the CourtViewer window. The various methods are listed below in order of difficulty.

Use the 'Send to CourtViewer' Button

1. Load an image on the Main Screen from an IssueBuilder, query, or the Document Database. (Note: If you are in dual screen mode and want to display an image from an IssueBuilder in the Main Window, drag the image IssueBuilder item onto the image display area.)
2. Press the Send to CourtViewer button located below the image display region.

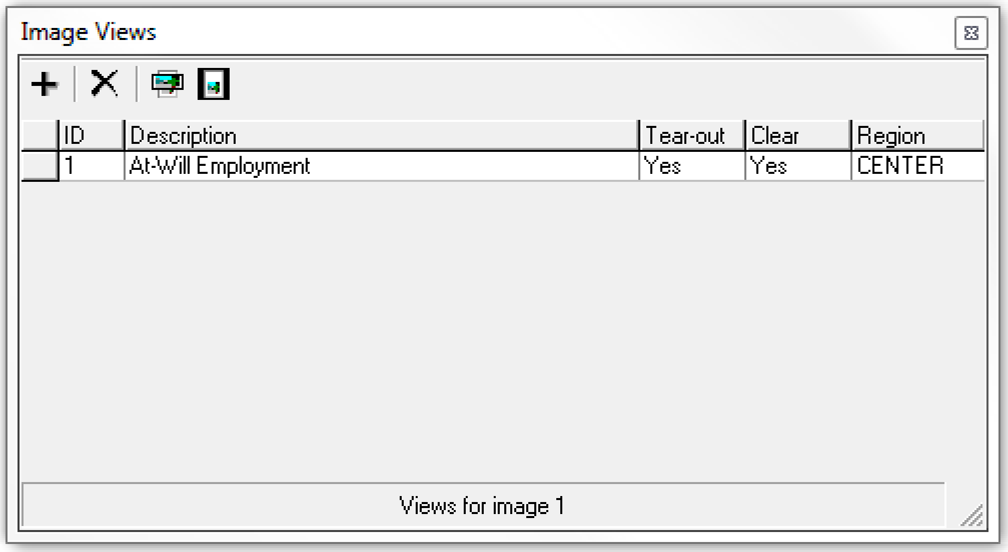


Use the ImageViews Window

1. Load an image on the Main Screen from an IssueBuilder, query, or the Document Database. (Note: If you are in dual screen mode and want to display an image from an IssueBuilder in the Main Window, drag the image IssueBuilder item onto the image display area.)
2. Press the 'Show current image full screen' icon on the ImageViews toolbar.

Or

Select one of the ImageViews (if there are any) and press the 'Show ImageView' icon on the ImageViews toolbar. This will cause specified ImageView (along with it's annotation and zoom settings) to be displayed.



Load current image full screen in CourtViewer.

Load selected ImageView.

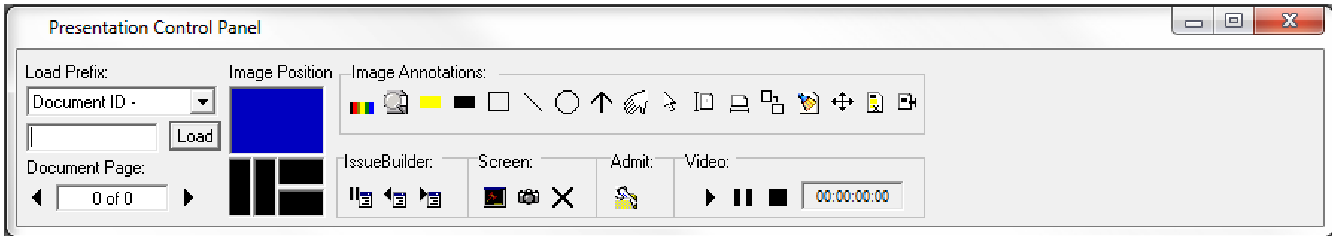
Enter the Exhibit Number or other field value for the image that you want to load (dual screen)

1. In the Presentation Control Panel select the desired Load Prefix. If for example, you wished to load an image based on its trial exhibit number (and this data has been coded in the database) then you would select the TrialExhibitNo load prefix.
2. Enter the value of the document that you wish to find and press the ‘Enter’ key or press the ‘Load’ button.

Note: It is not necessary to include any leading zeros when loading images based upon ImageID, DocumentID, DepoExhibitNo, or TrialExhibitNo fields.

Enter the Exhibit No or other field value for the image that you want to load (single screen)

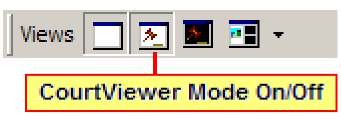
1. Make the CourtViewer screen visible and click on it to ensure that it has focus. (One way to display the CourtViewer window is to click on the ‘Blackout Court-Viewer Window’ icon on the main toolbar.



2. Type in the Load Prefix followed by the field value for the image that you wish to load. If you omit the load prefix, then the default prefix will be used. See the Setting the Default Load Prefix for more information.

Double click on an IssueBuilder item (dual screen)

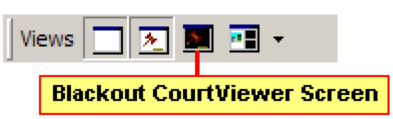
1. Open the IssueBuilder that contains the image that you wish to open.
2. Make sure that Visionary is in CourtViewer mode. (You can determine if Visionary is in CourtViewer mode by looking at the 'View' section of the toolbar on the Main Window.)



3. Double click on the IssueBuilder item that you wish to display.

Double click on an IssueBuilder item (single screen)

1. Make the CourtViewer screen visible and click on it to ensure that it has focus. (One way to display the CourtViewer window is to click on the 'Blackout CourtViewer Window' icon on the main toolbar.



2. On the CourtViewer's right hand toolbar, press the IssueBuilder list icon. 
3. Press the IssueBuilder icon  on the right hand toolbar. This will cause the selected IssueBuilder to be displayed.

4. Double click on the IssueBuilder item that you wish to display.

See Also:Changing Pages in CourtViewer

Image Presets

Bar Codes

Visionary can interface with bar code readers to load data in its CourtViewer presentation window. Visionary supports the use of bar code readers that emulate keyboards. The output from these types of bar code readers mimic the output of a keyboard.

For example, if you swipe a bar code that reads '.1002' while the Windows Notepad is open, '.1003' will be printed inside of Notepad as though you had typed it. Accordingly, for Visionary to work with bar code readers, the presentation window must have focus just as it would if you wanted to enter the number or ID of an item that you want to load via the keyboard.

See also: Printing IssueBuilders

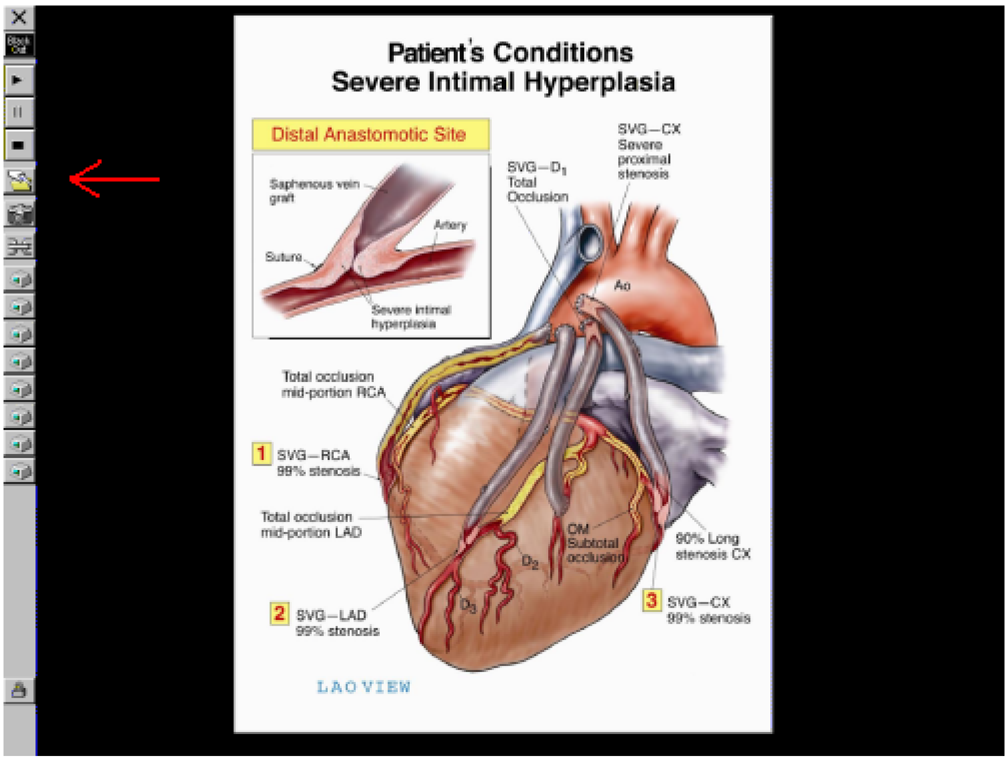
Exhibit Tracking

Visionary's exhibit tracking feature makes it easy to track and database images as they are admitted. When images are marked, they are added to a predefined "Trial Exhibits"

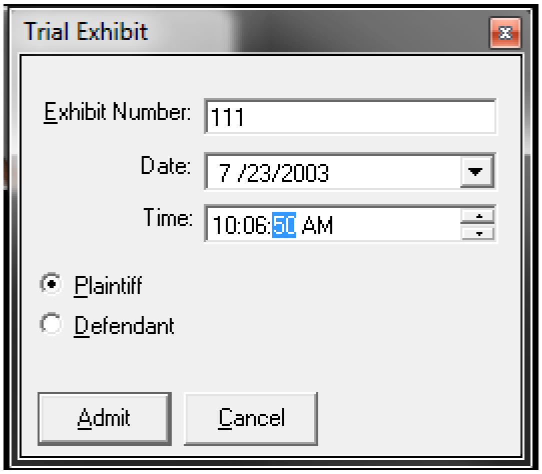
IssueBuilder and the TrialExhibit field in the Document database is updated.

To mark an image as an exhibit:

1. Display an image while in CourtViewer mode. See the Displaying Ad Hoc Display of Images topic.
2. Select the ‘Admit Exhibit’ icon  from the left pop-out toolbar or on the Presentation Control Panel (dual screen mode) or press ‘Alt-A’.

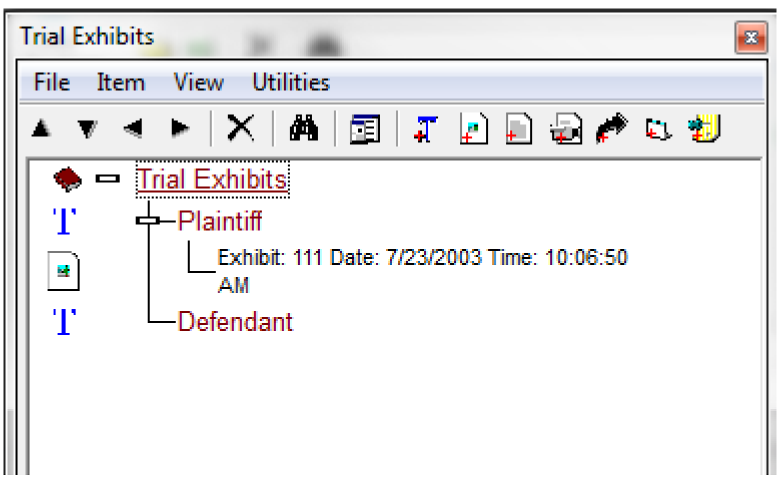


3. In the Trial Exhibit dialog enter the Exhibit number and whether the exhibit is being entered by the Plaintiff or Defendant.



Note - Visionary automatically enters the ‘Date’ and ‘Time’.

4. Press the ‘Admit’ button. The current document has now been added to the Trial Exhibits IssueBuilder and the Document Database has been modified to reflect the proper Trial Exhibit Number.



Screen Captures

The screen capture function can be used to capture the exact state of the CourtViewer window.

To do a screen capture of the CourtViewer window and add this capture to the Document Database:

1. Display something in CourtViewer mode.
2. Press the Screen Capture Icon on the Presentation Control Panel or bottom toolbar of the CourtViewer window.

How to Create Tear-Outs

To create a tear-out in CourtViewer mode:

1. Load an image.
2. Press the ‘Ctrl’ button, then press the right mouse button on the image and drag the mouse over the region that you wish to ‘tear-out’ of the image and then release the mouse button.

Or

Select the tear-out annotation tool from the bottom toolbar on the CourtViewer Window or the Presentation Control Panel.

Scripted Presentations

Visionary’s IssueBuilders can be used to create scripted presentations where video clips, text clips, and images are displayed together and/or in sequence. Scripted presentations can also display captions and layer data elements on top or beside one another. For a better understanding on how to use the scripting features in Visionary, review the ‘Scripted Presentation Demo’ contained in the sample case that is distributed with the Visionary Installation CD and review the following topics:

How to Play a Series of Video Clips

How to Display an Image During a Video Clip

How to Display an Image with Tear-outs Using IssueBuilders

How to Play a Series of Video Clips

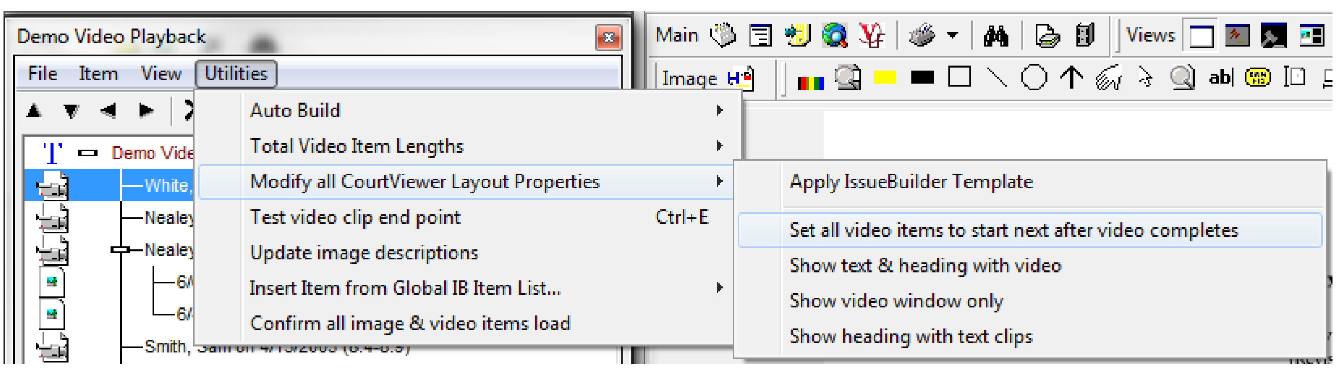
A series video clips can be played back to back using the IssueBuilder scripting functionality.

To play a series of video clips back to back:

1. Add a series of video clips to an IssueBuilder.
2. Select the first video clip.
3. Press the right mouse button on the IssueBuilder and select the 'Properties' menu item.
4. Select the 'After Video Completes' option in the 'Run Next Item' section of the IssueBuilder Properties window.

To set all the video clips contained in an IssueBuilder to play back-to-back:

1. Add a series of video clips to an IssueBuilder.
2. Select the 'Utilities / Modify all CourtViewer Layout Properties / Set All Video Items to Play After Video Completes' menu item.



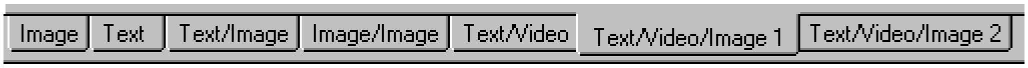
How to Display an Image During a Video Clip

Using the IssueBuilder scripting features, it is possible to display images, including annotation and tear-outs, while video is playing on the screen.

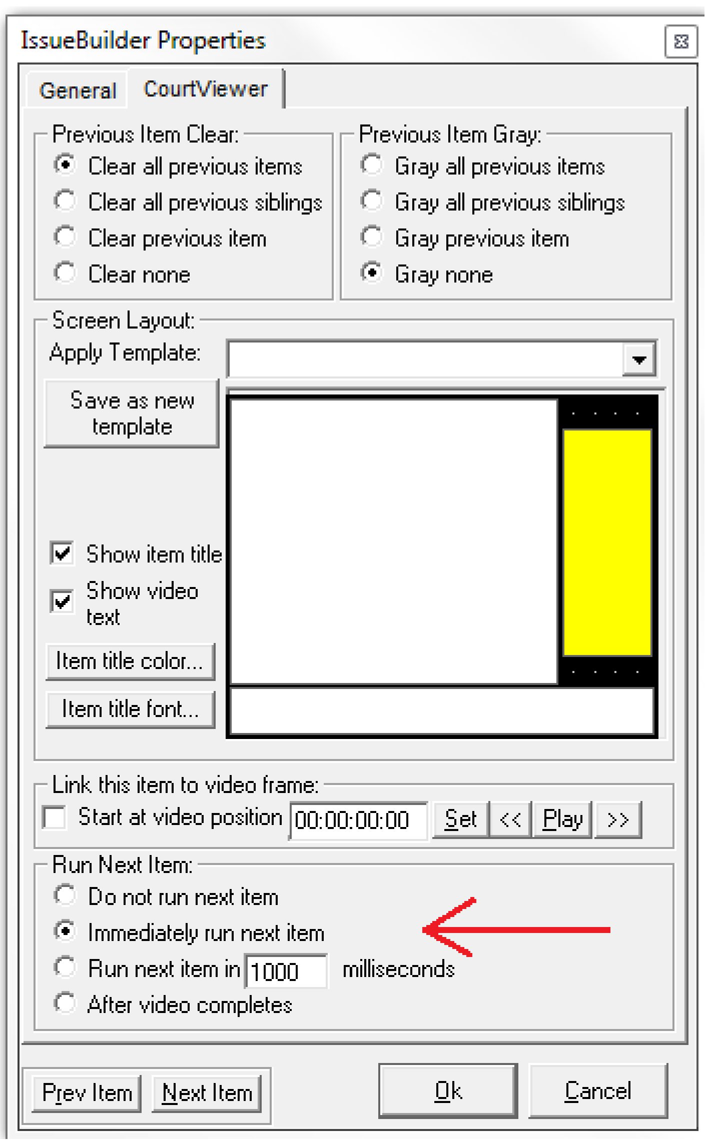
To show an image in the middle of a video clip:

1. Make sure that you are NOT in CourtViewer Mode.

Note: You may find it easier to do this type of scripting in the 'Text/Video/Image 1' screen mode.

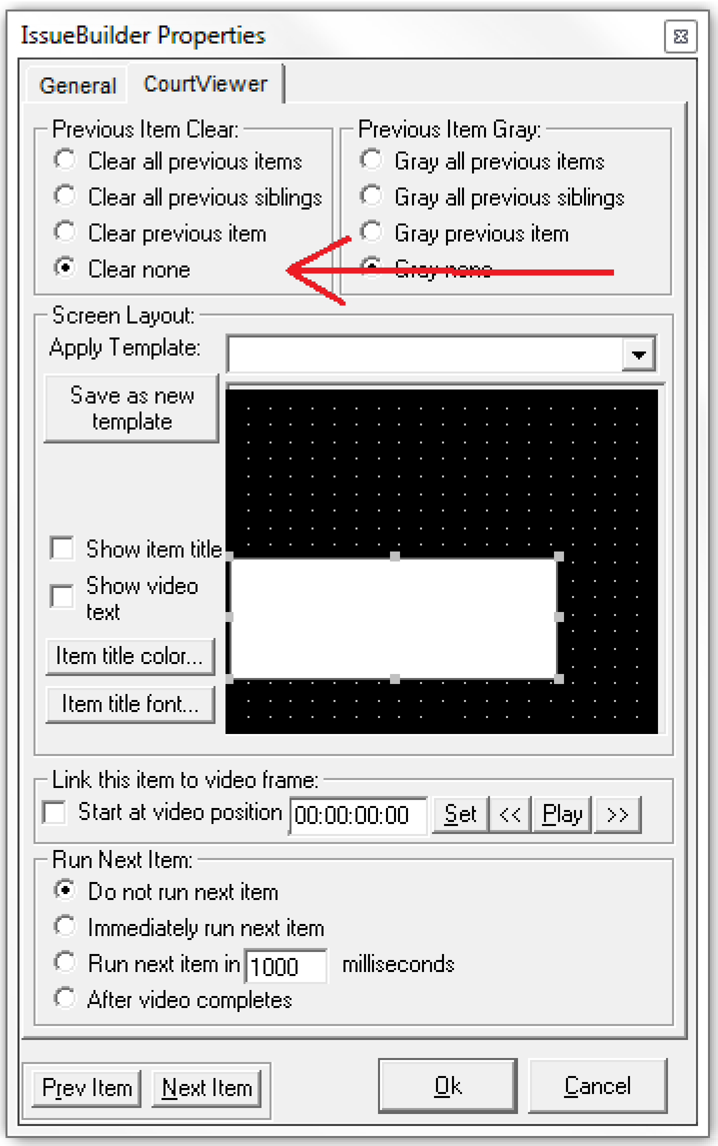


2. Create a new Issue Builder by clicking on the ‘Create New Issue Builder’ button on the Case Explorer window or select the ‘File/New/IssueBuilder’ menu item on the Main Window.
3. Create a video clip. See the Adding Transcript Clips or Adding Video Clips topics for further details.
4. Load the image that you wish do display during the video clip. See the Displaying Images topic.
5. Annotate and size the image as desired and add it to the IssueBuilder after the video.
6. Select the video clip item in the IssueBuilder and display the IssueBuilder Properties dialog (right mouse click and select the ‘Properties’ menu item).



a. Position the video display area (white area) to the left side of the screen.
b. Select the ‘Immediately run next item’ option.

7. Select the image IssueBuilder item and modify its properties as follows:



a. Select the ‘Clear none’ option.
b. Position the image display region to the right side of the screen.

8. To play the video and image, switch to CourtViewer Mode and the double click on the video IssueBuilder item.

This example shows what it looks like when two images are displayed while the video plays.

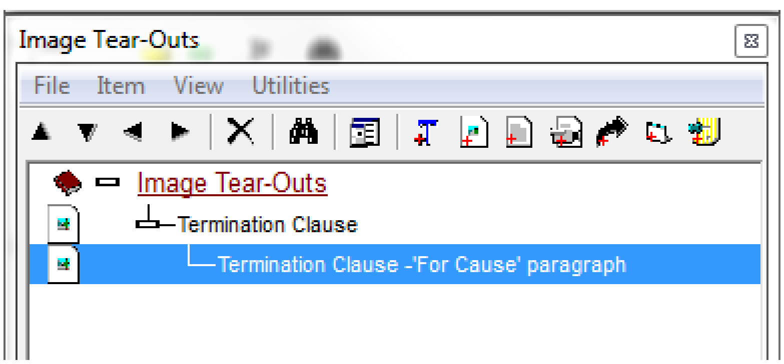
How to Display an Image with Tear-outs Using Issue-Builders

To display an image with tear-outs using IssueBuilders:

1. Open an IssueBuilder
2. Display an image. (See Displaying Images topic)

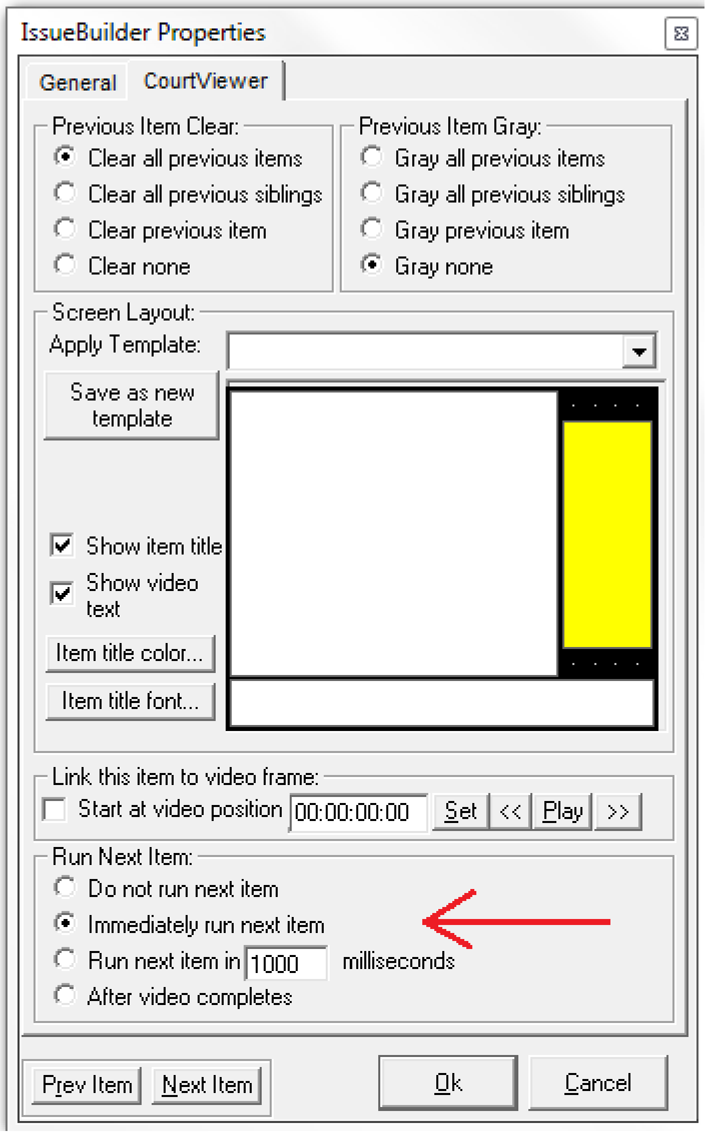
Note – Be sure to have the 'Image ' tab view selected.

3. Make sure that the entire image is displayed and not zoomed or cropped. (See Fit-to-Height and Fit-to-Width topics)
4. Add the image to the current IssueBuilder by pressing the Image icon.
5. Click on the 'Crop Zoom' button located in the tool bar and select the image area that you wish to 'tear-out'.
6. Add the cropped image to the current IssueBuilder by pressing the Image icon on the Image Toolbar. At this point you have added two items to the IssueBuilder, one that displays the image full screen and a second that displays a cropped version of the image.

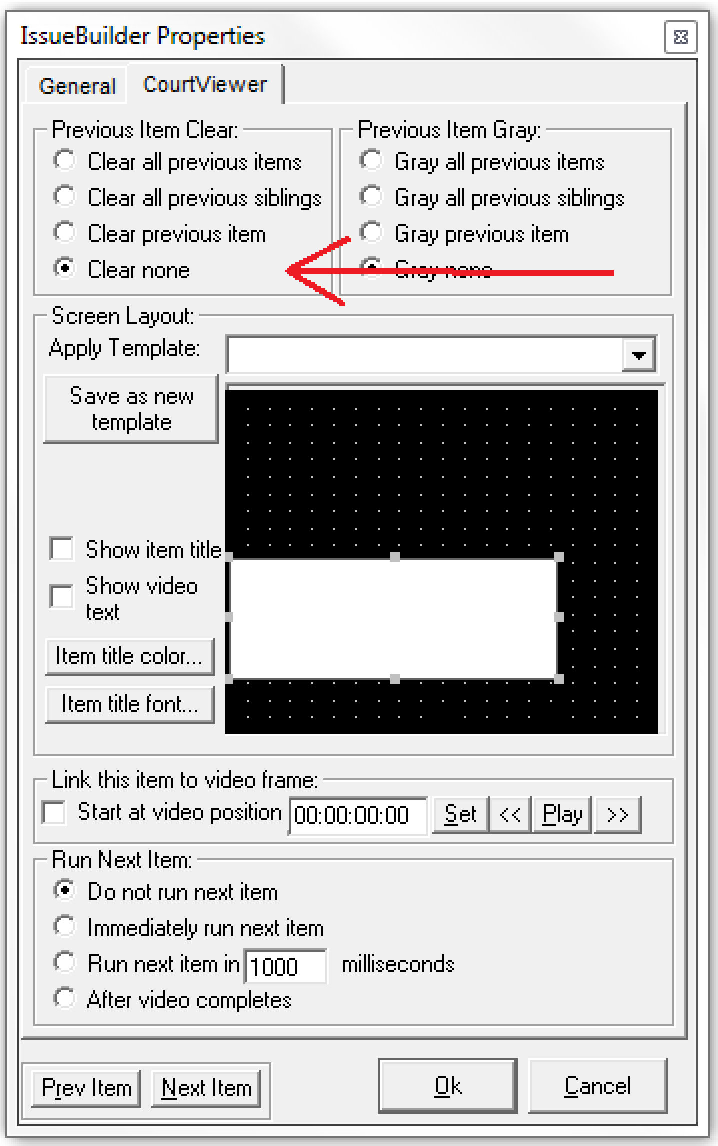


Note – You can also apply other annotations to the image before adding it to the IssueBuilder. See the Image Annotations topic for further details.

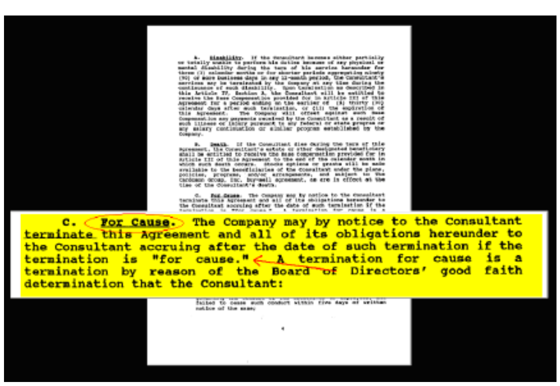
7. Select the first image in the IssueBuilder, right mouse click and select the 'Properties' menu item from the popup menu.
8. In the 'Run Next Item' section of the IssueBuilder Properties window, select 'Immediately Run Next Item'



9. View the properties for the second (cropped) image in the IssueBuilder. Set the Previous Item Clear property to ‘Clear None’



10. Switch to CourtViewer mode and then launch the IssueBuilder item (See Displaying an IssueBuilder Item topic). When in CourtViewer mode, you will see something like the following:



See Also: How to Display Ad Hoc Tear-outs in Presentation Mode

How to Display Ad Hoc Tear-outs in Presentation Mode

To create a tear-out on the fly in presentation mode:

1. Load an image into the presentation screen.
2. Press the Ctrl key and draw using the mouse to draw a region on the displayed image. When you release the mouse button, you'll have a tear-out.

To hide the tear-out:

1. Make sure that it was the last image selected
2. Press the 'F-11' key (See CourtViewer Shortcut Keys topic)

To move a tear-out:

1. Press 'Ctrl-M' or select the 'Move' annotation tool from the image toolbar
2. Move the tear-out by pressing the left mouse button on the image, dragging the tear-out to the desired location, and releasing the mouse button.

See Also:How to Display an Image with Tear-outs Using IssueBuilders

CourtViewer Shortcut Keys

Most of the program functions that can be accessed with the CourtViewer Window's tool-bars or the Presentation Control Window can also be accessed through the use of short-cut keys. In general, the Presentation Window must have the focus in order for these shortcut keys to work.

Pressing These Keys	Performs This Action
ESC	Clear Screen

CTRL + X	Clear Screen
F12	Clear Current Image
Shift + F12	Clear Other Images
F11	Current Image Annotations Hide/Show
CTRL + D	Delete Current Image Annotations
END	Delete Last Annotation
DEL	Delete Selected Annotation
CTRL-ALT-SHIFT-E	Plays the last 5 seconds of the current clip
Move	Move
	Fit to Width Current Image Region
CTRL + H	Fit to Height Current Image Region
SHIFT + W	Fit to Width Current Image Full Screen
SHIFT + H	Fit to Height Current Image Full Screen
CTRL + M	Current Image Allow Move and Resize
ALT + 1	Current Image to Lower Left Corner
ALT + 2	Current Image to Bottom
ALT + 3	Current Image to Lower Right Corner
ALT + 4	Current Image to Left
ALT + 5	Current Image to Center
ALT + 6	Current Image to Right
ALT + 7	Current Image to Upper Left Corner
ALT + 8	Current Image to Top
ALT + 9	Current Image to Upper Right Corner
CTRL + C	Load Image Center Region
CTRL + L	Load Image Left Region
CTRL + R	Load Image Right Region
CTRL + T	Load Image Top Region
CTRL + B	Load Image Bottom Region
CTRL + Up Arrow	Current Image Rotation is 0
CTRL + Down Arrow	Current Image Rotation is 180
CTRL + Left Arrow	Current Image Rotation is 270
CTRL + Right Arrow	Current Image Rotation is 360
Scroll	Scroll
	Scroll Current Image

CTRL + S	Current Image Scroll Bars On/Off
Zoom	Zoom
SHIFT + Left Mouse Button	Tear Out Select Position
CTRL + Left Mouse Button	Tear Out Centered
Annotation Tools	Annotation Tools
CTRL + 1	Crop Zoom
CTRL + 2	Highlight
CTRL + 3	Redaction
CTRL + 4	Box
CTRL + 5	Circle
CTRL + 6	Line
CTRL + 7	Arrow
CTRL + 8	Zoom
CTRL + 9	Hand Scroll
CTRL + 0	Pointer
Image Display	Image Display
Page Down	Next Page
Page Up	Previous Page
Other	Other
ALT + A	Admit Button
ALT + C	Screen Capture
CTRL + Page Down	Next IB Item
CTRL + Page Up	Previous IB Item
CTRL + ALT + P	Pause/Play Scripted IB
Video	Video
CTRL + P	Pause/Play Video
CTRL + ALT + [0-9]	Adjust video playback Speed (if version of Media Player and hardware permits)

SHIFT + Right Arrow	Move forward a frame when in frame-by-frame playback; Jump forward when playing
SHIFT + Left Arrow	Move back a frame when in frame-by-frame playback; Jump back when playing
Load Prefix Change	Load Prefix Change
ALT + T	Trial Exhibit Number
ALT + D	Deposition Exhibit Number
ALT + Plus Key	Image ID
ALT + P	Page Number
ALT + I	IssueBuilder Item Number
ALT + Minus Key	Document ID
ALT + V	Image Views
Preset Buttons	Preset Buttons
SHIFT + CTRL + F1	Assign Current Image to Preset Button 1
SHIFT + CTRL + F2	Assign Current Image to Preset Button 2
SHIFT + CTRL + F3	Assign Current Image to Preset Button 3
SHIFT + CTRL + F4	Assign Current Image to Preset Button 4
SHIFT + CTRL + F5	Assign Current Image to Preset Button 5
SHIFT + CTRL + F6	Assign Current Image to Preset Button 6
SHIFT + CTRL + F7	Assign Current Image to Preset Button 7
SHIFT + CTRL + F8	Assign Current Image to Preset Button 8
CTRL + F1	Display Image for Preset Button 1
CTRL + F2	Display Image for Preset Button 2
CTRL + F3	Display Image for Preset Button 3
CTRL + F4	Display Image for Preset Button 4
CTRL + F5	Display Image for Preset Button 5
CTRL + F6	Display Image for Preset Button 6
CTRL + F7	Display Image for Preset Button 7
CTRL + F8	Display Image for Preset Button 8
Preset Buttons	Preset Buttons
CTRT + ALT + T	Show/Hide Toolbars

Administrative Tasks

Case Administration

This section of the manual is intended to cover the periodic administrative tasks and cover the topics relevant to backing-up and restoring data, networking users, recovering corrupted databases, security issues and other issues related to keep end users up and running. This chapter also covers some of the technical details that might be of interest to Information Technology personnel when deploying Visionary on their network – topics most end users never need to worry about.

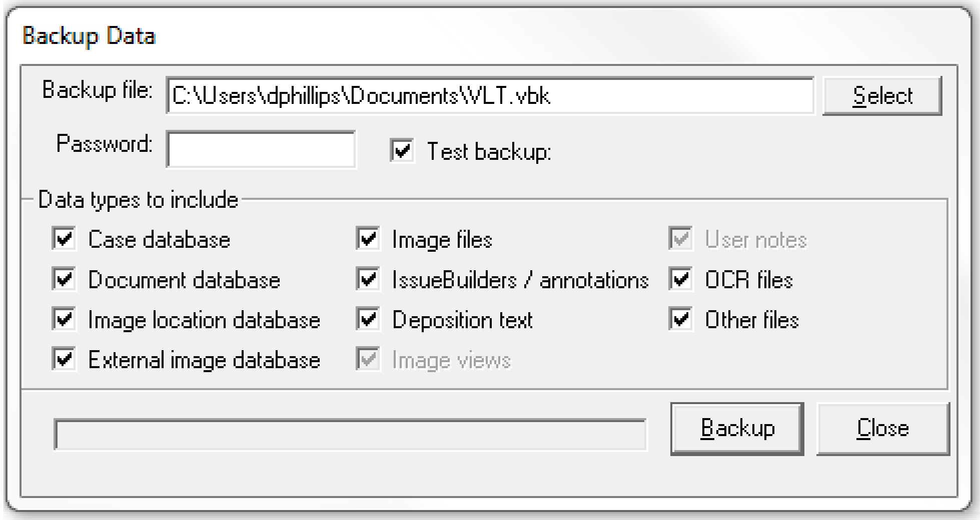
Information Technology Personnel Topics of Interest

If you are an IT person, you may have little need to know how to use Visionary for creating digital outlines of a cases or playing video clips in trial. However, you may need to understand how Visionary stores its data, how Visionary works in a networked environment, how to import and backup data, and how to move data from your network to a laptop so that your attorney's can go to court. Below is a list of topics contained in this and other chapters that you'll find the most useful in providing your litigation team the behinds-the–scenes support your litigation department will appreciate.

- Creating New Cases
- Backing Up Cases
- Restoring Cases
- Networking Issues
- Rebuilding Database Files
- Folder Structure
- Video File Locations
- Image File Locations
- Importing Data: Transcripts, Images, Audio/Video-Synced Transcripts
- Image Volume Redirector

Backing Up Cases

The Backup Data is accessible from the Select Case dialog and allows you to backup all or part of your case data, including linked Concordance_Database_Manager external databases. You may backup your data to a hard drive or removable media such as Jaz disks or floppy disks. The backed up files are stored in a ZIP compatible format with file extension .vbk. Backup files may be used to restore part or all of your case transcripts and databases.



To Backup Case Data:

1. From the Select Case dialog, select the case that is to be backed-up or select the '\File\Backup' menu item from the Main Window.
2. Select the 'Backup' toolbar button.
3. Select the types of data you wish to include in the backup and click on the Backup button.

    a. Case database – Sync, hyperlink, video list, and transcript list data.
    b. Image document DB – Document database, page description, and lookup data.
    c. Deposition text – ASCII transcript files, transcript objection lists.
    d. Image files – Image files contained in the case image folder.
    e. IssueBuilders / annotations – IssueBuilder and image annotation data.
    f. Image location DB – Image location data.
    g. OCR files – Files in the case 'OCR' folder.
    h. External Image Database – Includes external database identified in the case setup.
    i. User notes – User notes. (always included with IssueBuilders)
    j. Other files – Any files in the case 'Other' folder.
    k. Image views – Image views data. (always included with IssueBuilders)

4. The case data will be saved to the location chosen in the Backup File box. The files are automatically compressed.

TIP: It is highly recommended that you backup your entire case on a regular basis and whenever you import new transcripts. IssueBuilder and Document DB data should be backed whenever significant amounts of time has been spent working in these areas.

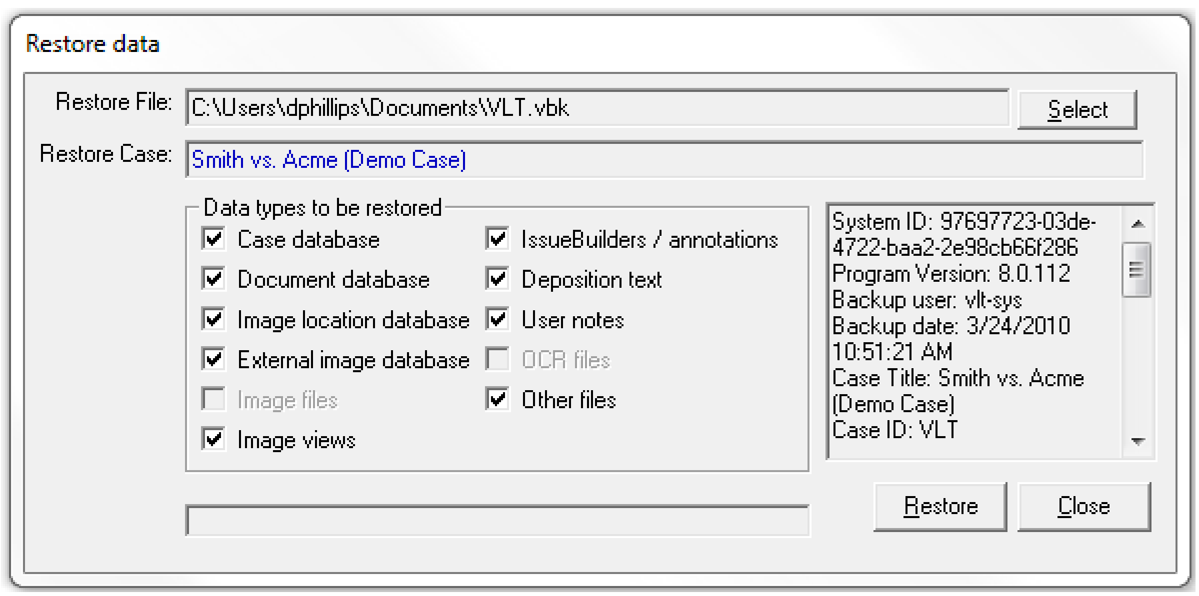
See Also: Restoring Case Backup Files

Restoring Case Backup Files

The Restore Case Data command restores previously saved case data from a file of type .vbk to your Visionary system. This function also allows users to transfer an entire case to a new Visionary system.

To Restore a Case:

1. From the Select Case dialog, press the "Restore" button on the toolbar.
2. Select the Visionary backup file (.vbk) that is to be restored.
3. If the backup file you will select is password protected, enter the password.
4. Click on the Restore button.



Note- When you restore a case using a Visionary Backup file, the items that were included in the backup will be activated in the selected items to restore. All options may not be available depending on the items that were originally included in the backup.

VBK files used to Create Cases must include: Case database, Document database, Image location database, Image Views, IssueBuilders/annotations, Deposition text, and User Notes. If the backup file does not contain all of these files, you will not be able to create a case from this .vbk.

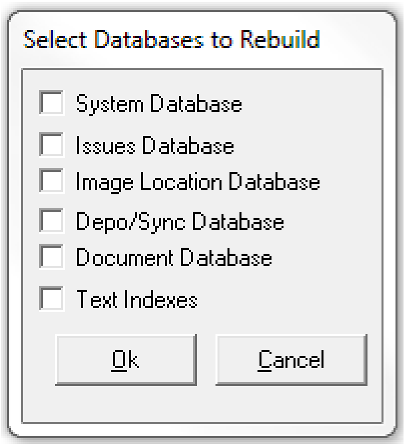
See Also: Backing up Cases

Rebuilding Database Files

Although it is rare, it is possible for the databases used by Visionary to become corrupted. Most of the time, these corruptions can be fixed by the Rebuild Database utility.

To rebuild your databases:

1. Open the Select Case dialog.
2. Select the case that needs to be rebuilt.
3. Press the ‘Utilities’ toolbar button to display the Select Databases to Rebuild window.



4. In the Select Databases to Rebuild window, select which database(s) you wish to rebuild. Below is an explanation of what information each of the databases stores.

   - System Database – Stores the list of cases and case passwords.
   - Issues Database – Stores all IssueBuilder and Fact Databases.
   - Image Location Database – Stores image load file information.
   - Deposition/Sync Database – Stores depositions, hyperlinks, and sync information.
   - Document Database – Stores document and page description information.
   - Text Indexes – Indexes used to speed transcript and database searches.

5. Press the ‘Ok’ button to start the rebuild process.

Note: When working on large databases or network connections, the rebuild process can take a considerable amount of time. Resist any urge to restart the Visionary through Task Manager as this might further corrupt your databases.

Program Updates

Updates to Visionary software can be obtained from the Visionary Legal Technology web site at www.VisionaryLegalTechnologies.com. In addition, you can check for program updates by selecting the ‘Help/Check For Update’ menu item on the Main Window.

Network Issues

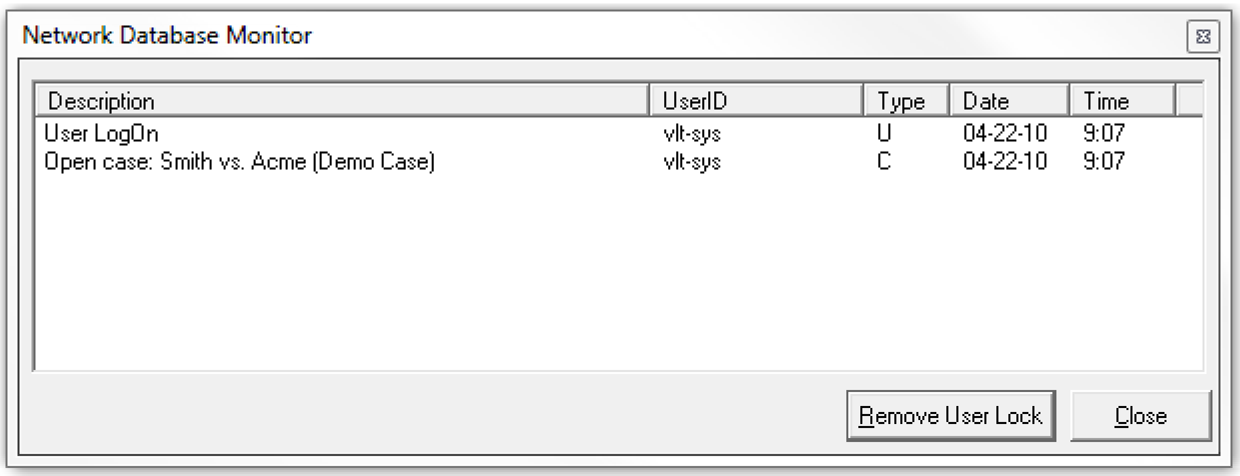
Visionary Cases can be shared by multiple users when placed on network file servers. Visionary tracks which users are logged in to its databases and manages user-locking issues to ensure that users don’t write over each other’s data (see Network Database Monitor topic). Below is a list of the basic things a network administrator must consider when configuring Visionary to work in a networked environment.

- Users must have read, write, modify and delete permissions. Ninety-nine percent of all tech support calls relating to network issues are rooted in users not having proper permissions.
- Visionary’s image location database stores a volume label instead of a drive letter to locate image files. In the case of local drives, Visionary uses the drive volume label to locate drives. In the case of mapped network drives, Visionary uses the network share names. If you move images from a local drive to a network share, you’ll likely need to make changes to your database or use the Image Volume Redirector to get the images to load.
- All data generated by Visionary is contained in a folder named ‘vs_data’ that is located in the root of your Data Drive. See the Folder Structure topic for details on how Visionary stores its data.
- Video and image files do not have to reside with Visionary’s Data Drive directory. However, it often works well to do so.
- Video files must reside in one of three places on any drive connected to the local computer (CD-ROM/DVD drives included):
    - The root directory
    - A ‘\Video’ directory off the root directory.
    - A ‘Video’ directory inside of the case folder (i.e. ‘c:\vs_data\CaseID\video’)
- Establish policies regarding where data is stored. When users store data both locally and on a network, some data will not be accessible to all users. In general, if you are going to store some data on a network file server, it is best to save all your data on the server.

- Streaming video files over a network is now fairly common. Be aware that MPEG-2 files can take 2-8 times the bandwidth and drive space of MPEG-1 files. Although the quality of MPEG-2 is outstanding, some consideration should be given to the size and bandwidth benefits of MPEG-1. Note MPEG-4 is a promising new format that may offer the best of both MPEG-1 and MPEG-2.
- Users must use a mapped drive. UNC's cannot be used.

Network Database Monitor

The Network Database Monitor is accessible through the Utilities Menu on the main Visionary screen. The Network Database Monitor shows how Visionary is tracking users in its databases. When a user opens an IssueBuilder or Note, Visionary places a lock on that item, so that subsequent users will have read-only access.



If a user leaves Visionary without going through the proper shutdown sequence, locks can remain when they shouldn't. When this happens, the locks can be removed by selecting the item that you wish to unlock and pressing the 'Remove user Lock' button.

Below is an explanation of the various columns on the Network Database Monitor.

Description – description of what's being locked.

User ID - the user name of everyone who is currently connected to the case.

Type - indicates what type of data the user is currently manipulating. 'N' = note, 'I' =IssueBuilder, 'C' = When and what case a user opened, 'U' designates the time and date that a user logged in to Visionary.

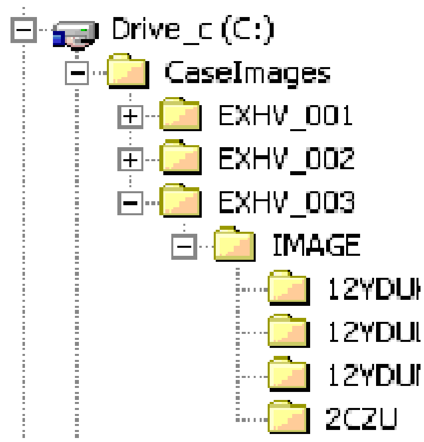
Date and Time – indicates when the user logged in or when the lock was applied.

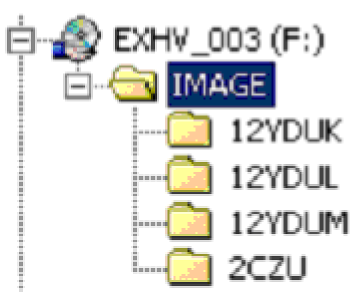
Image File Locations

Image files can be located on any attached drive or network share. There is no requirement that images be stored with the case directory. Visionary locates images through the combined use of the Image Page Database and the Image Volume Redirector. Refer to these two topics for more information on configuring your cases to display images.

Moving image files from CD to Hard drive

Image files are commonly delivered on CD and need to be placed in a central network share or hard drive for easier and faster access. To begin, copy your images to your network or hard drive. Copy them to the following location: [driveLetter]:\vs_data\CaseID\Image directory. Consider the following example:

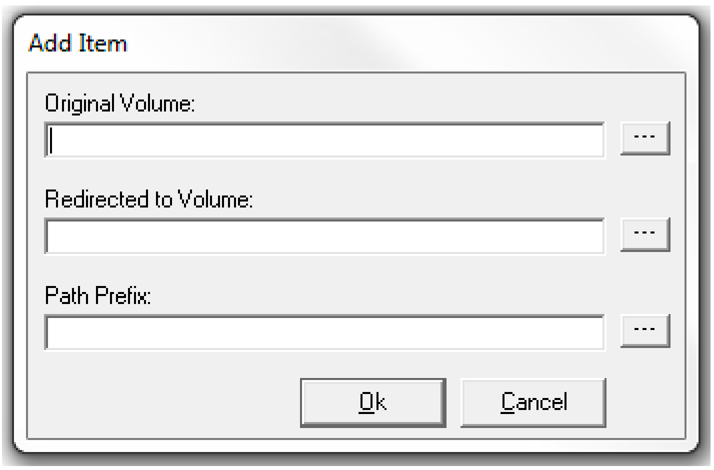




Once your images are copied to your local or network drive, the next step is to configure the Document Page Database, image load file, or Image Volume Redirector to point to the correct drive and path location. Image load files can be modified in a text editor like

WordPad prior to being imported into Visionary. You should note that the file location setting for locally connected drives is the corresponding drive volume name and the file location setting for network drives is the drive share name.

Using the above example: In order to have the program look to the C: drive for these image files. Select Utilities/Image Volume Redirector. Select the Add New button.



Enter EXHV_003 as the Original Volume. Enter Drive_c as the Redirected to Volume. Enter \CaseImages\EXHV_003 as the Path Prefix.

RECOMMENDATION: We suggest that you import the load file that points to the CD's and then use the Image Volume Redirector to point Visionary to the new local hard drive or network location. This gives you the ability to quickly move back to using the CD's, if it ever becomes necessary, and provides you with the most flexibility.

Network to Laptop Data Migration

The process of moving data from your network to your laptop will vary depending on the types and locations of data. This topic attempts to draw your attention to the various issues you are likely to run into when moving your data from one location to another.

Moving Transcripts, Sync, Visionary Document and IssueBuilder Data

Moving the data directly imported into Visionary is accomplished by backing up your case and restoring it to a new location. Visionary backups can include your transcripts, Sync Data, IssueBuilders, user Notes and Images. Visionary backups will NOT include copies of video files.

See also: Backing Up Cases Restore Cases

Moving Image Files

Visionary locates images by using the drive location and file path information in the Document Page Database. The drive location information refers to a drive volume name or network connection share name. If you move data from your network drive to a local drive, you will have to either modify the file location information in the Document Page Database or use the Image Volume Redirector to tell the program to look to an alternate data location. For example, if you copied your images from your network whose share name was 'Net_Image_Data' and your local hard drive had the volume label 'drive_c', then you would need to modify your document page database to reference 'drive_c' instead of 'Net_Image_Data'.

Moving Video Files

If you are playing your video files on the CD/DVD, or hard drive that they were received on, then the only step is connecting the CD/DVD, or hard drive to the laptop. If you want to play the video from a different location (i.e., the local hard drive) then you should follow the steps outlined in Moving Video files from CD/DVD to hard drive.

Moving 3rd Party Databases

Visionary provides you with an option to backup the 3rd party database (if any) associated with a case. If this option is selected, then your databases should be restored with your Visionary databases.

War Room to Court Room

Visionary incorporates several features to facilitate the movement for data between the war room and the courtroom. This topic is intended to cover common scenarios that clients encounter.

I have my data on a network and need to move it over to a laptop that I can take it to trial.

See Network to Laptop Data Migration

I want to set up my war room computer to mirror my courtroom computer.

The process of mirroring two computers is essentially the same process as described in the Network to Laptop Data Migration topic. However, for total redundancy purposes, it is advisable to assign both computers the exact same drive volume labels so that no drive redirection or document page database alterations are required.

I've just built an IssueBuilder that I need to use in court five minutes from now.

One of the big advantages of Visionary over other products is that you can transfer your IssueBuilder work product from one computer to another on a 'thumb drive' or other media that has limited space. Other programs require many megabytes of storage to accomplish the same task because image annotations are stored inside the image files and thus require that the image files be transferred to the courtroom computer.

To copy an IssueBuilder from one computer to another, simply select the File/Export/IssueBuilder menu item from the Main Window. Identify the name and folder to export to and select the 'Visionary IssueBuilder (VIB) Save As file type.

IMPORTANT: IssueBuilders contain pointers to data – not actual data (i.e. image, text, video files). If you export an IssueBuilder from the war room computer that contains references to data not contained on the courtroom computer, then the IssueBuilder will not work properly when used in the courtroom.

Last night I imported images into Visionary, built an IssueBuilder and now I need to use those images and IssueBuilder in the courtroom.

1. Export your VDF file.
2. Copy your VDF and new image files onto something that you can bring to the courtroom.
3. Import your VDF file.
4. Copy the image files onto the courtroom computer in the same directory location that they existed on the war room computer.
5. Import the image files into the courtroom computer. (See Importing image files)

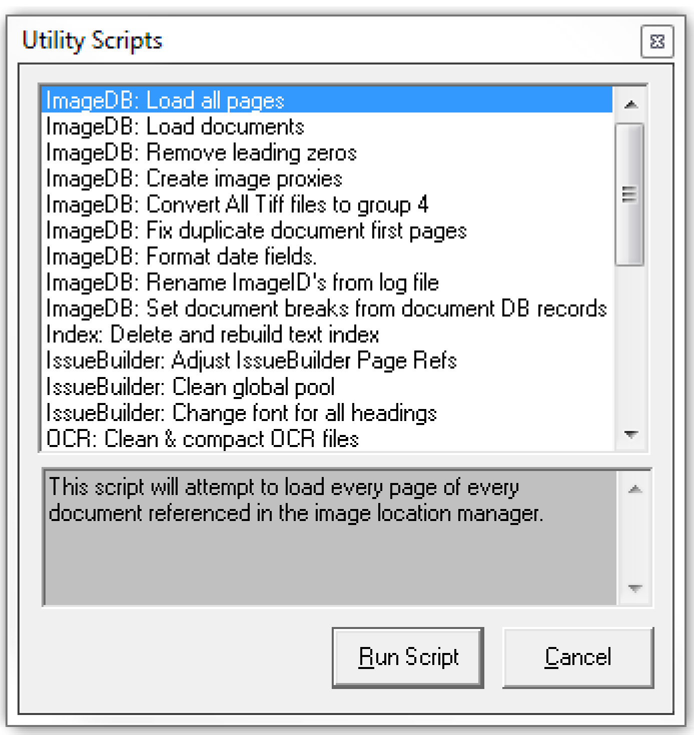
IMPORTANT: If you are going to import images without a load file that assigns image id’s you should ensure that you image names are unique and less than 20 characters. This will ensure that both the war room and courtroom computers will assign the same image id to the files and that the IssueBuilders will work properly.

I’ve just imported a synched (VDF) file into my war room computer, built an IssueBuilder, and now I need to get the synched transcript and IssueBuilder into the courtroom computer.

1. Export your IssueBuilder from your war room computer.
2. Import your VDF into your courtroom computer.
3. Import your IssueBuilder file into your courtroom computer.

Utility Scripts

The Utility Script dialog displays a list of infrequently used diagnostic and data manipulation scripts. An explanation of what each script does is displayed below the script list when list items are displayed.



To run a script:

1. Select the script to run.
2. Confirm that the script performs the desired task by reviewing the detailed description of the script.
3. Press the ‘Run Script’ button.

Video File Locations

Video files must reside in one of three places on any drive connected to the local computer (CD-ROM/DVD drives included):

1. The root directory.
2. A ‘\Video’ directory off the root directory.
3. A ‘Video’ directory inside of the case folder. (i.e., ‘c:\vs_data\mycase\video’)

Security

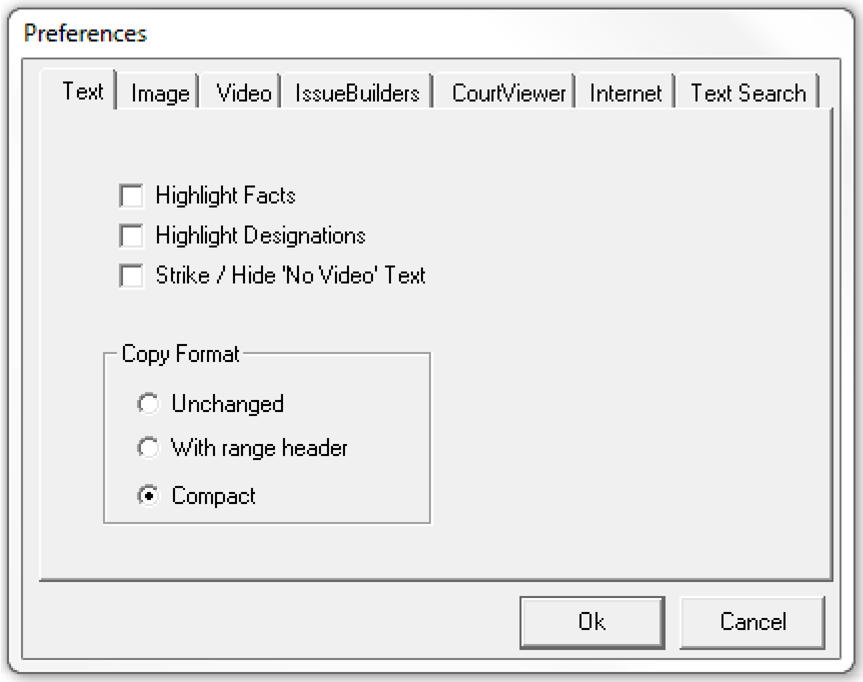
Visionary provides three mechanisms for limiting user access to data.

- User Logon Passwords – Users can be required to enter their user ID and password before running the program. See the Users and Logon Window topics for more information.
- Case Passwords – Passwords can be required to open cases. See the Creating Cases topic for more information.
- User Access Levels – You can assign different access levels when creating users. See the Users topic for more information.

Important Note: Case/Network administrators should understand that the security mechanisms built into Visionary are primarily intended to help users save them from themselves and can be easily circumvented by someone who is willing to spend a little time and effort to do so. Administrators should rely on their network security policies to protect sensitive data.

Configurations & Preferences

Text Preferences

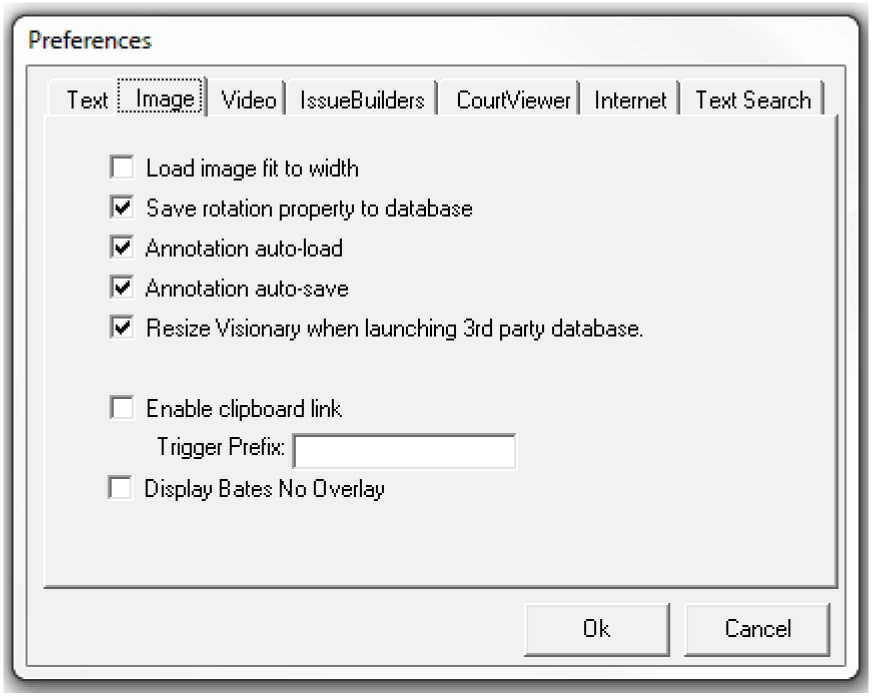


Highlight Facts – Causes portions of the transcript that are associated with Facts that are associated with Issues to be colored the Issue color. See the Create facts from Transcript Clips topic.

Highlight Designations - Causes portions of the transcript that are associated with Facts that are associated with Designations to be colored the Designation color. See the Creating Designations topic.

Strike / Hide ‘No Video’ Text – Cause portions of the transcript that were marked as ‘no video’ during the sync process to not be displayed in Courtviewer mode and to display with a strike through line in the Main Window.

Image Preferences



Load image fit to width – Causes images to be loaded fit-to-width in the Main Window. This option makes it easier to read scanned images at the cost of only seeing part of the page.

Save rotation property to database – Causes the rotation setting for a page to be saved to the database and used the next time that the page is displayed.

Annotation auto-load – When checked, this option will cause any annotations saved with an image (See Annotation auto-save option below) to automatically be displayed.

Annotation auto-save – When checked, annotations added to an image in the Main Window will automatically be saved with an image and displayed whenever the image is recalled.

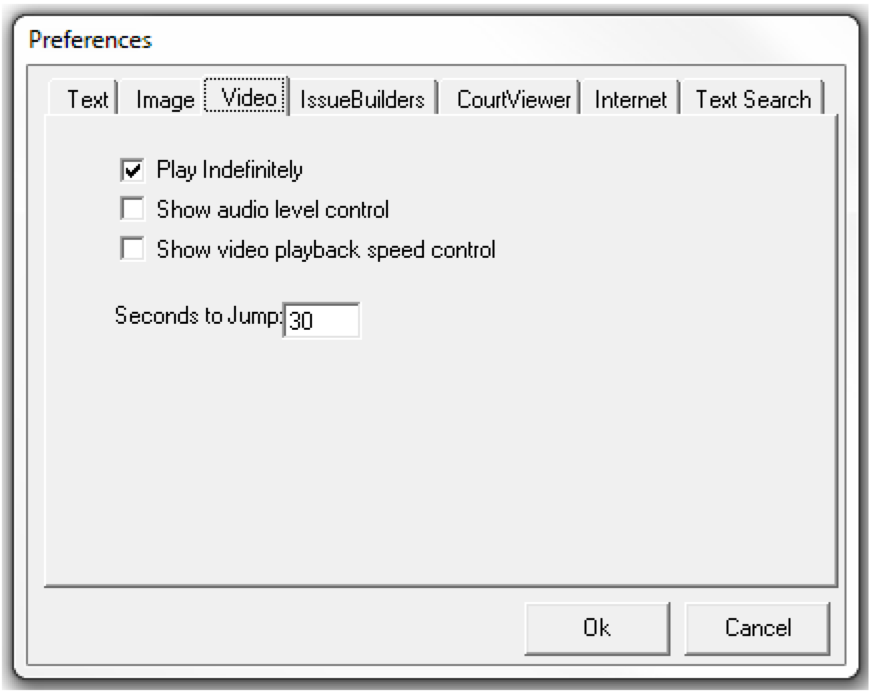
Resize Visionary when launching 3rd party databases – When checked, Visionary will automatically resize to the right side of the screen to make room for a third-party database program.

Use full-text index when searching images – (Professional Plus Edition Only) – Causes Visionary to use a full-text indexing engine for image database searches.

Enable clipboard link – When enabled, Visionary will monitor the Windows clipboard for requests to load images. See the Clipboard Messaging topic.

Trigger Prefix – Defines a leading character filter that Visionary will use to determine whether or not to examine something that has been posted to the Windows clipboard.

Video Preferences



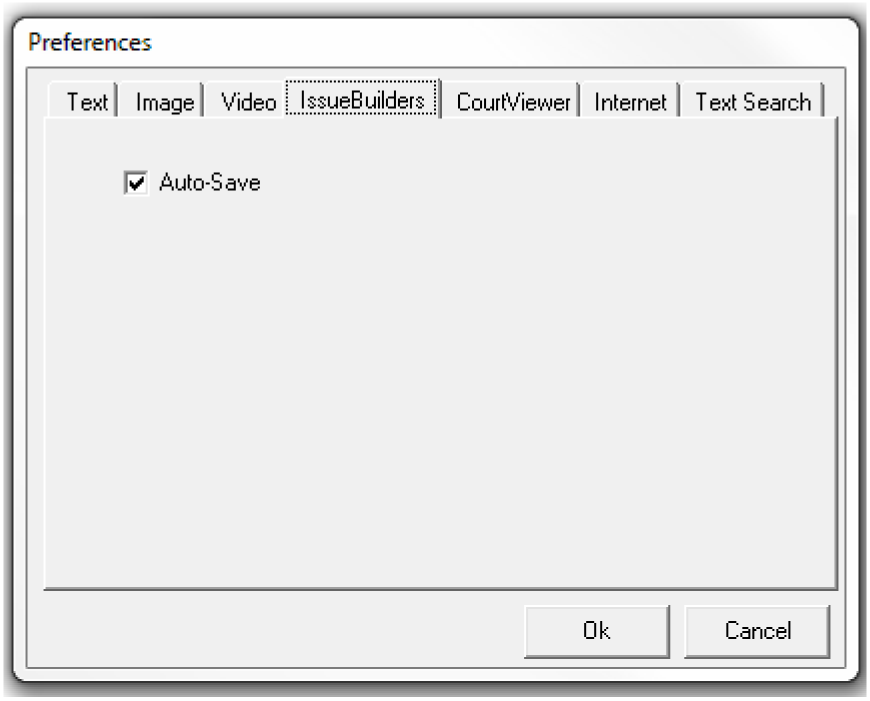
Play indefinitely – This option causes ad hoc clips to start the video playing indefinitely as opposed to only playing the part of the video that corresponds to the selected portion of the transcript.

Show audio level control – This option causes the audio level control to be displayed on the video control bar.

Show video playback speed control – This option causes the playback speed control to be displayed on the video control bar.

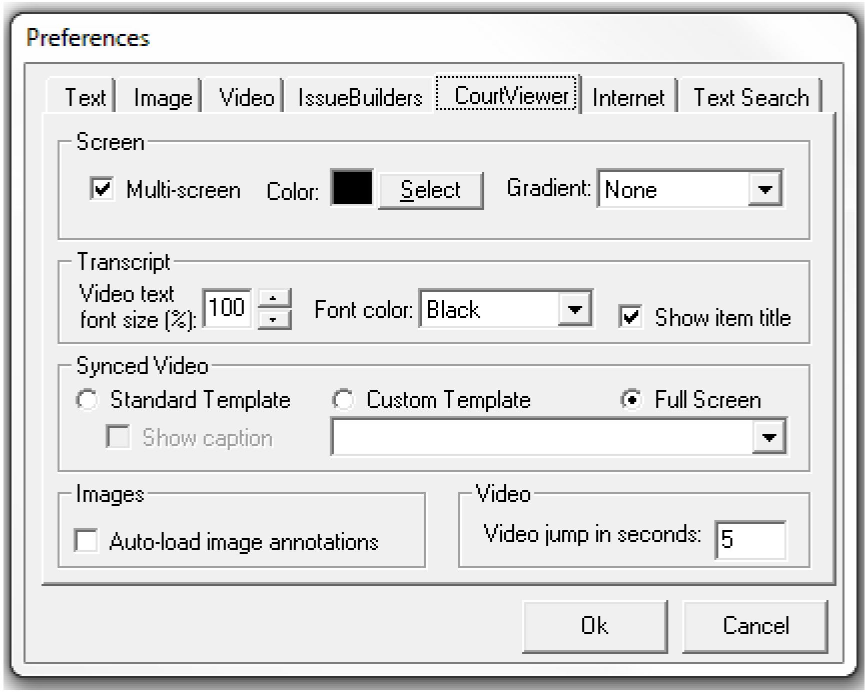
Seconds to jump – Sets how many seconds the video will jump when pressing the seek forward or backward buttons on the CourtViewer tab of the IssueBuilder Properties Window.

IssueBuilder Preferences



Auto-save – This option causes all IssueBuilder data to be saved automatically whenever a change is made to an IssueBuilder. When deactivated, you must save your IssueBuilders manually and it is strongly recommended that you save your IssueBuilder frequently in order to avoid losing data due to a power outage or other unexpected event.

CourtViewer Preferences



Screen

Use multi-screen setup – When enabled, this option will cause Visionary to use two screens when in CourtViewer Mode, one for the main screen and the second for the CourtViewer screen. This option may only be modified when Windows is configured to support multiple monitors. (See How to Configure a Computer for Dual Screen).

Color – Sets the background color for the CourtViewer presentation screen. The default background color is black.

Gradient – Determines whether the CourtViewer window will display as a solid color or a gradient between two different colors.

Transcript

Font size multiplier - Determines the size of text that is displayed on the CourtViewer screen. If your text is displaying too large or too small, try editing this value.

Font color – Sets the font color for headings.

Show caption – Determines whether or not the clip title will display with playing ad hoc video clips.

Synced Video

Full Screen – Ad hoc video clips will be displayed full screen.

Standard Template – Ad hoc video clips will display with scrolling text.

Show Caption – Determines whether or not the clip title will display when the ‘Standard Template’ option is selected.

Custom Template – Ad hoc video clips will play using the custom screen layout set in the IssueBuilder Properties Window.

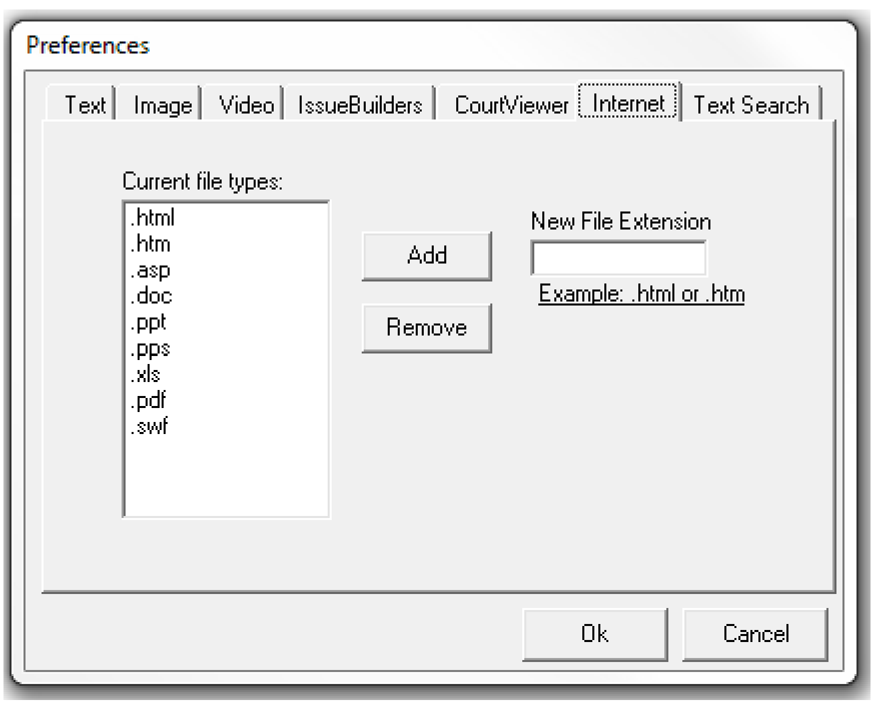
Images

Annotation auto-load in CourtViewer – When enabled, annotations that have been associated with images (See Saving Annotations With Images)ImageDisplay_AssociatingNotesWithImages will automatically display in the CourtViewer window.

Video

Video Jump in Seconds – Determines how far the video will jump when using the shift-left/right buttons in Courtviewer mode.

Internet Preferences



Current File Types - This is a drop down list box of all the file extensions, or types set to be displayed in the Internet Window within the program. If a file type is not listed, it will not be loaded into the Internet Window.

New File Extension - This is an entry box where you may add a file extension to the list of files to open in the Internet window. Type in the extension and select the Add button. To remove a file extension, type in the extension and select the Remove button.

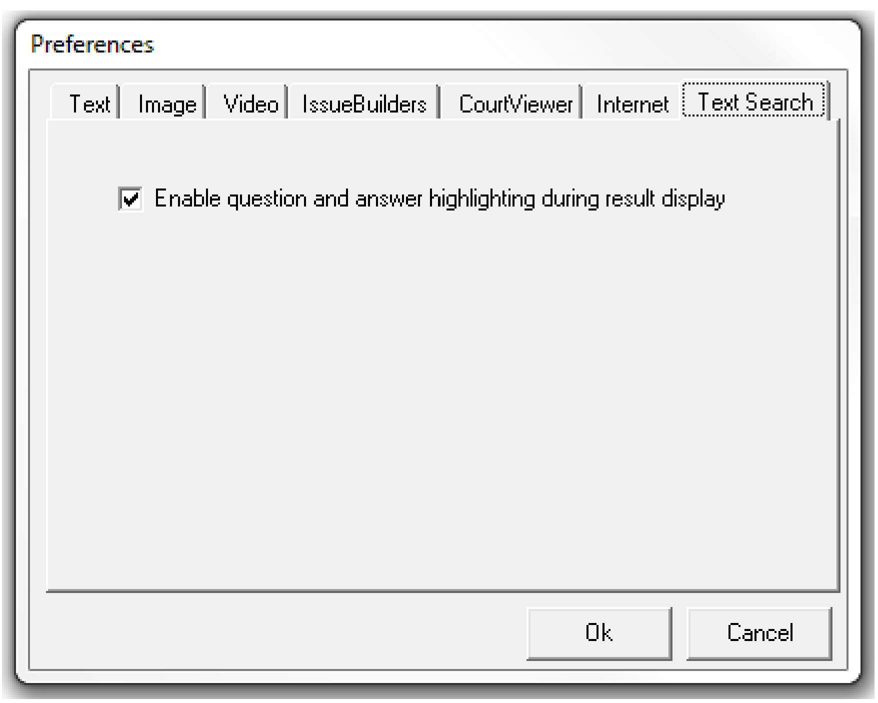
To add a new Internet File Type:

1. Enter the extension of the new file type in the 'New file extension' text box.
2. Press the 'Add' button.

To remove an Internet File Type:

1. Select the Internet File Type that you wish to remove.
2. Press the 'Remove' button.

Text Search Preferences

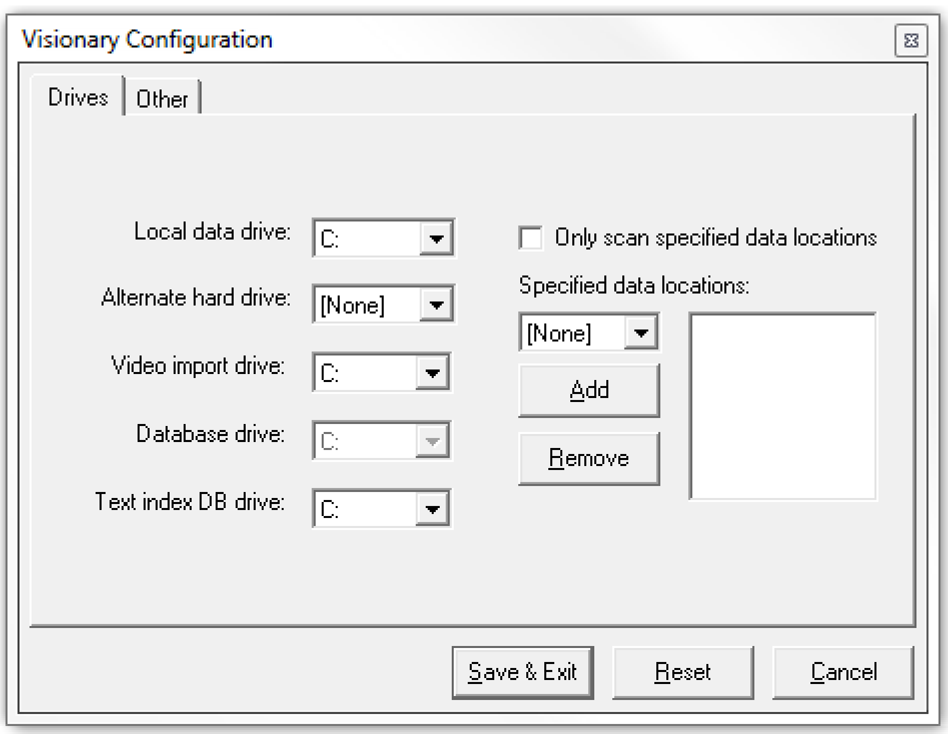


Enable question and answer highlighting during result display - When enabled, selecting a search result will highlight the entire corresponding question and answer in the text window.

Drive Configurations

Other Tab

To open the Configurations Dialog select the ‘Options/Configurations’ menu item on the Main Window.



DataDrive

Identifies the local data drive that should be used to store temporary data files.

Alternate Hard Drive

The Alternate Hard Drive setting identifies an additional location that the program will check when trying to locate image or video files. In most cases, this setting can be set to [None].

Database Drive

The location of the main database files is determined by the Database Drive setting. This setting can be set in the Logon Dialog only and is read-only on the Configurations Dialog.

Text Index DB Drive (Professional Plus Edition Only)

The Text Index DB Drive setting determines the location of the text index database. The text index database is the engine that Visionary uses for full text searching in the Professional Plus Edition. Text index databases can only be opened by a single user at a time. Accordingly, the Text Index drive setting should be set to a local drive when working in a networked environment when multiple users will access case data simultaneously.

Only scan alternate data locations

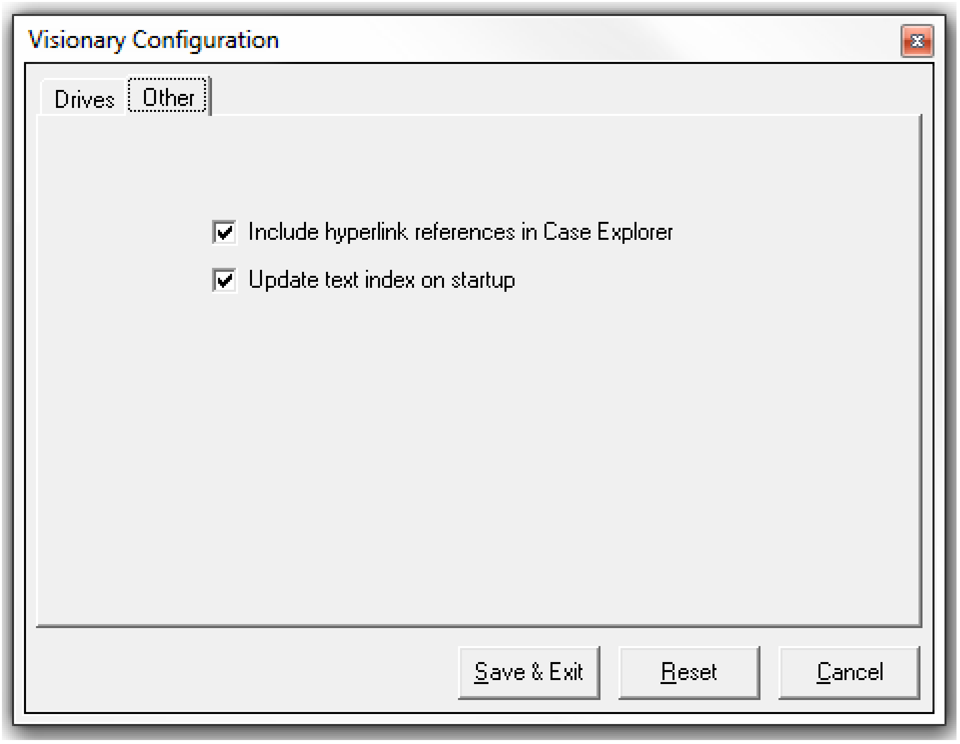
If the only scan alternate data locations box is checked, no drives will be scanned except for those listed in the Specified Data Locations list. All specified locations must be entered in the list before checking this box. Be careful to include all connected drives that contain data for your case. This option is most useful when a workstation is connected to several network drives that do not have unique disk labels.

Specified data locations

The specified data location list is used when multiple hard drives or a CD Jukebox are connected to the system or when a workstation is connected to several network drives that do not have unique disk labels. Use the Add and Remove buttons to add drives to the list or remove drives that are no longer needed.

Other Configurations

Drives



Include hyperlink references in Case Outline

When this option is selected, hyperlinked references (see Hyperlinking Images to Transcripts) will be displayed with depositions in the Case Explorer. The Case Explorer will need to be refreshed after changing this setting. In cases with many deponents and hyperlinks, leaving this option unchecked can dramatically improve the time needed to build the Case Explorer list.

Update text index on startup <Professional Plus Edition>

If this option is selected and you are running the Professional Plus Edition of Visionary, Visionary will scan all transcripts, OCR, and other text files to determine if the search indexes need to be updated and will update them accordingly.

Third Party Software Integration

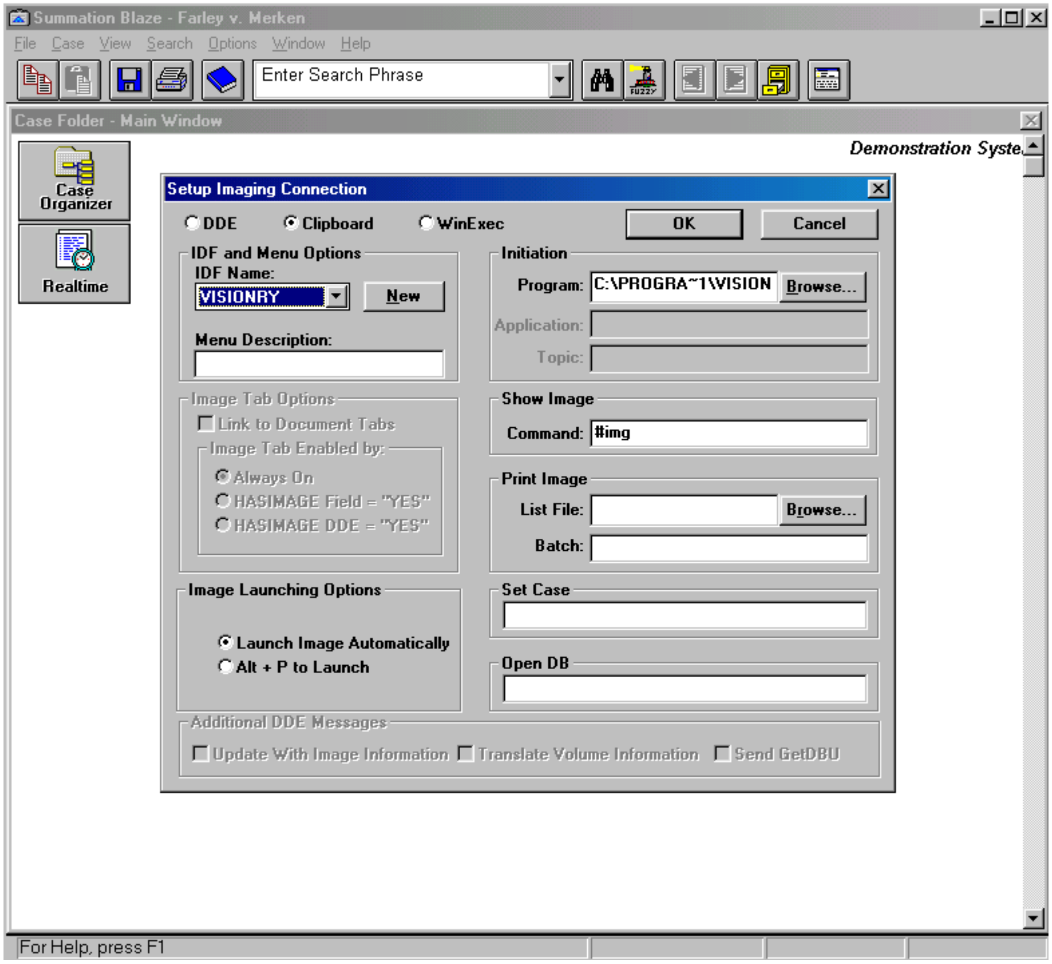
Summation

Summation Blaze

Visionary can be linked to existing Summation Databases. Connecting to 16 bit versions 5.0, 5.1, 5.2 and 5.21 is accomplished thru a clipboard link, while the IBlaze 32 bit versions are setup thru a DDE connection.

Below are the steps to follow for creating a link between Visionary and Summation 5.0, 5.1, 5.2 and 5.21:

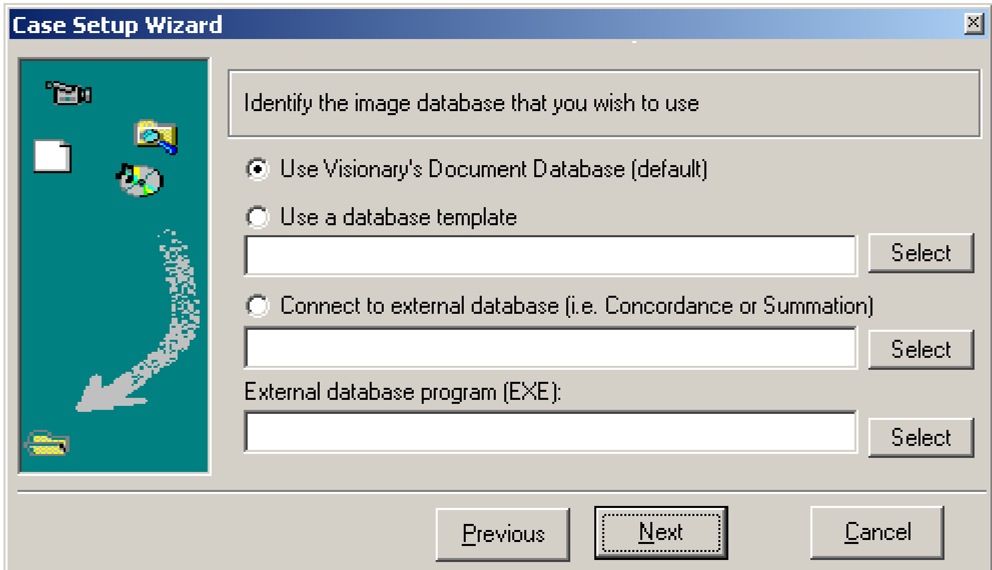
1. Import your images into Visionary using a load file provided by your imaging vendor. Verify that images existing in your Summation DB exist in Visionary.
2. Within Visionary go into Options Menu, select Preferences and the Image tab. Check ‘Enable Clipboard Link’ option.
3. Go into Summation and click on Options and Imaging Connection and Setup Imaging Connection.
4. Choose Clipboard, Type in "Visionary". For program choose the path: "C:\PROGRA~1\VISION~1\VISION~1.EXE". For Show Image Command type: "#img"
5. Set image launching options.



Summation iBlaze

Below are the steps to follow to create a link between Visionary and Summation IBlaze 1.0:

1. Import your images into Visionary using a load file provided by your imaging vendor. Verify Summation and Visionary Databases contain the same information.
2. Go to the File Menu and select the Setup Wizard. Press the Next button from the following screen. Select Link to image database. Enter the location of the Summation program file (sw32.exe) in the ‘Database Program (EXE):’ text box.



Note: When linking to Summation iBlaze, leave the ‘Connect to existing database’ text box empty. You will use Summation to select the case.

3. Launch Summation from the Summation button added to the Visionary main toolbar.
4. From within Summation you can send the entire database to currently open IssueBuilders or perform searches and set the result to currently open IssueBuilders by right clicking on the Field Headers in Summation. From this menu you can also print each document.

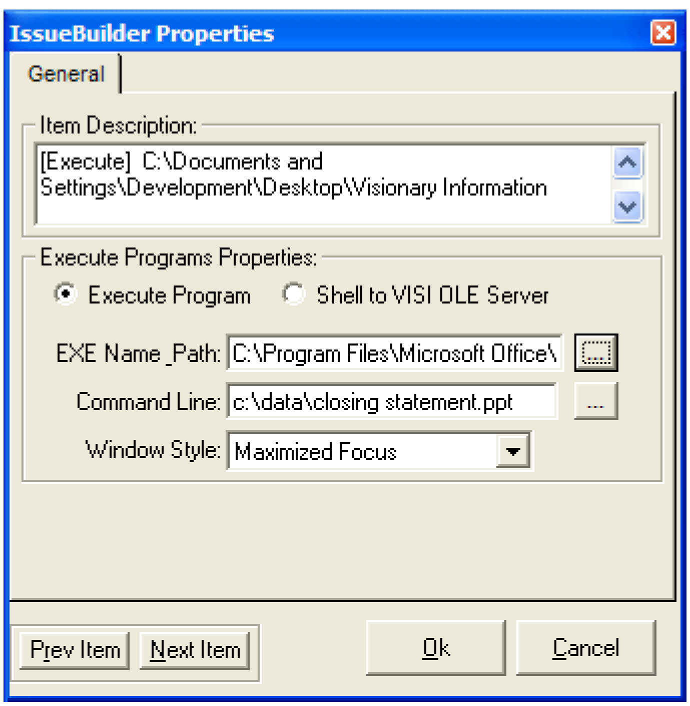
PowerPoint

Overview

PowerPoint is an effective presentation tool that is commonly used in conjunction with Visionary. Most often, PowerPoint is used for the creation of time lines and other demonstrative slides or for presenting information during opening or closing statement, where the presentation can be planned and presented in a fairly linear fashion. It is also common for users to export their PowerPoint slides out to JPEG or BMP files and then import those files into Visionary. This allows PowerPoint slides to be called up on the fly like any other document.

Launching PowerPoint From IssueBuilders

Visionary allows you to incorporate PowerPoint slides and presentations into your case. From an IssueBuilder, choose New Application Document from the Item menu or select Add program execute from the IssueBuilder toolbar. You will see the following screen when you first select to add this type of data item to your IssueBuilder.



Set the EXE Name_Path should be set to the location of the PowerPoint executable. In this example the path to the PowerPoint executable is C:\Program Files\Microsoft Office\Office\PowerPnt.exe. For the Command Line parameter, set it to the location of the PowerPoint .pps file. In this example the Command Line is set to F:\Sample Data\Visionary Information Systems.pps. Notice the –s prefix parameter in the Command Line. This tells PowerPoint to launch into slide mode. Without this parameter, PowerPoint will launch outside of Visionary with the selected file from the Command Line.

In most cases, the ‘EXE Name Path’ can be omitted. If the file’s extension (i.e. doc, .pdf, .xls, .ppt) that you want to display is registered with the operating system, Visionary will determine the location to the associated application.

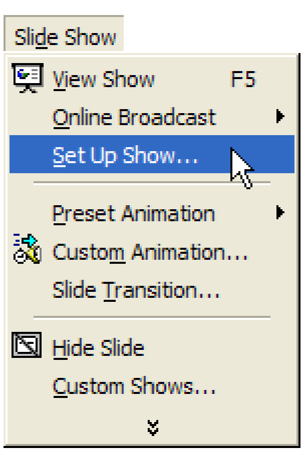
Displaying PowerPoint Presentations Inside of Visionary’s Browser

PPT and PPS files can be displayed in Visionary by importing them like any other image/document file (see Importing Image Files topic). When imported in this manner, you can code the PowerPoint data files like any other document and then recall the PowerPoint presentation by performing a query or entering an exhibit or document ID on the CourtViewer window or CourtViewer Control window. Visionary will display PowerPoint documents inside of the Internet Explorer component integrated into Visionary.

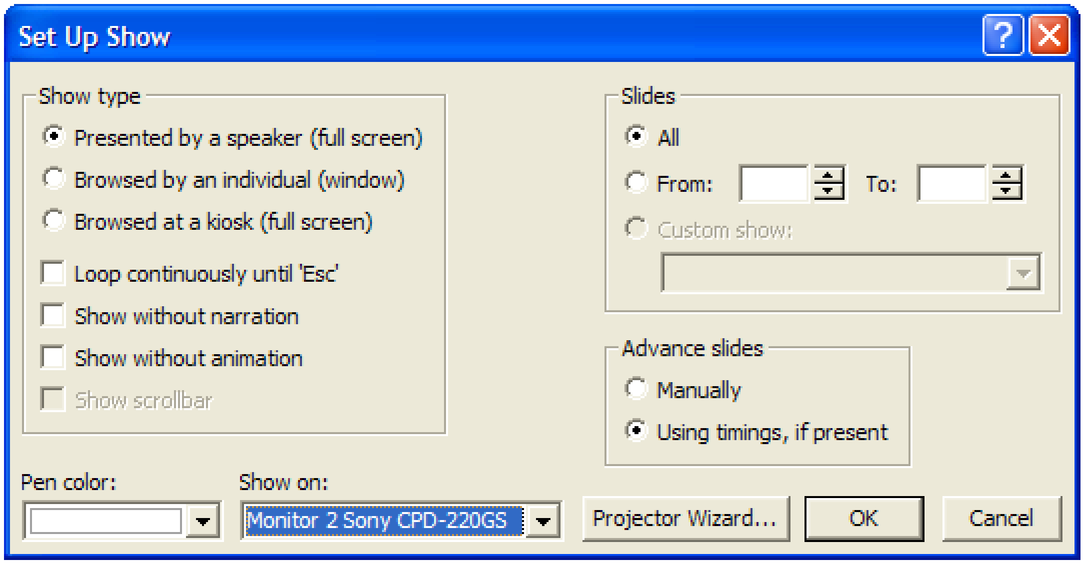
Dual Screen Setup

PowerPoint, like Visionary, can be configured to work in a dual monitor configuration. You should search the PowerPoint on-line help for the words "dual monitor’ for complete information. Minimal details for configuring PowerPoint™ 2000 are included here for convenience.

Step 1. With PowerPoint running, select the Set Up Show menu item from the main screen in PowerPoint.



Step 2. Set the ‘Show on’ setting to your second monitor.



It is also possible to use PowerPoint in a dual screen configuration by importing your PowerPoint flies into the Document Database and having Visionary display your PowerPoint presentations.

LiveNote

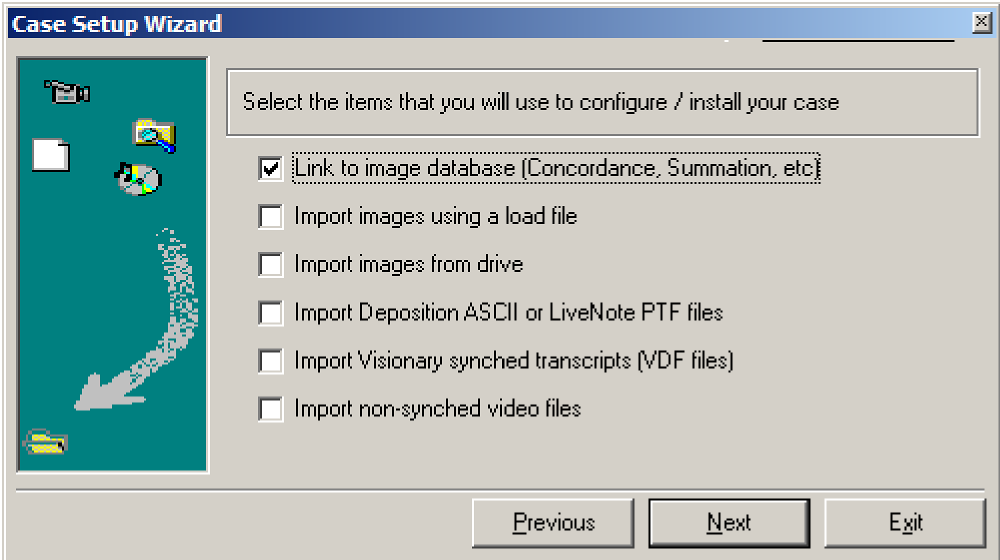
Visionary has the ability to import LiveNote PTF files. Attorney notes and transcript Issue coding information are transferred to the Fact Database inside of Visionary. See the Importing Transcripts topic for more information.

Concordance

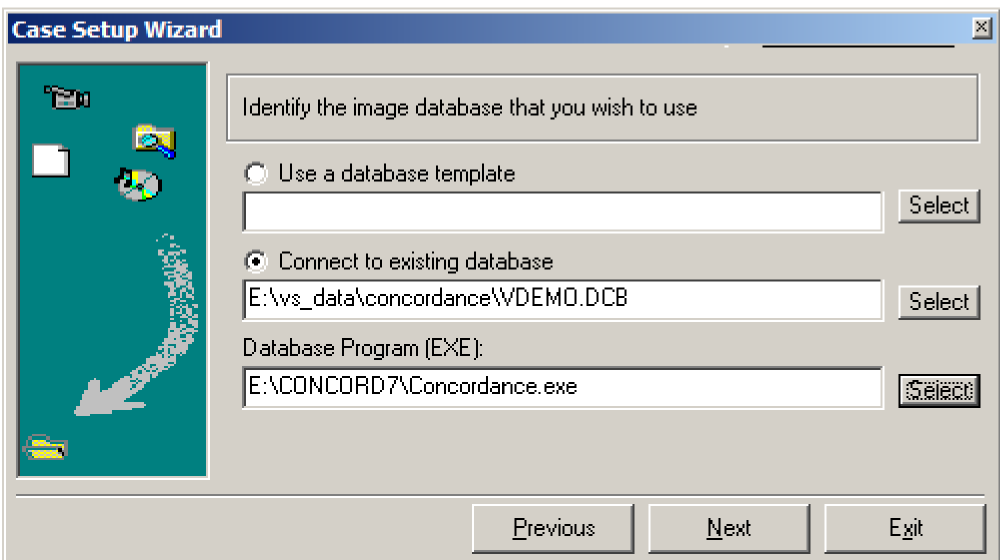
Although Visionary contains a fully configurable and searchable document database, it is sometimes desirable to use Visionary in conjunction with a more powerful database such as Concordance.

To link Visionary to a Concordance database:

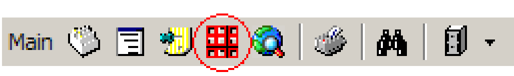
1. Select the ‘File / Setup Wizard’ menu item.
2. Press the ‘Next’ button to advance to the configuration checklist.
3. Check the ‘Link to Image Database’ option, and then press the ‘Next’ button.



4. In the database configuration step, select the Concordance database file to be associated with the current case and then select the Concordance program executable file (concordance.exe).

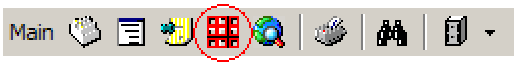


5. Press the ‘Next’ button twice to save the settings and return to the Main Window. You should now see the Concordance icon on the Main Window’s toolbar.



To launch Concordance from within Visionary:

1. Link the desired Concordance database to your current Visionary database using the instructions above.
2. Press the Concordance Icon that is located on the Main Window’s toolbar.



Note: In most cases, Visionary will automatically modify the Concordance database’s configuration files’ (ini) settings so that Concordance knows how to communicate with Visionary. However, sometimes it may be necessary to modify Concordance’s configuration setting manually to make the two programs communicate.

You may prevent Visionary from automatically updating a Concordance DB .INI file by setting the [Settings]VisionaryLock=1 in the visionary.ini file.

To manually configure Concordance to communicate with Visionary:

1. Open the Concordance database (in Concordance) that is to be linked to Visionary.
2. Select the ‘Tools / Preferences’ menu item in Concordance.
3. Select the ‘Viewer’ tab and enter the settings for the DDE Server and DDE Topic as seen below. The other settings are optional. In most cases it’s best to apply the settings to the current database.

To display images selected in Concordance inside of Visionary:

1. Link Concordance to Visionary per the instructions above.
2. Launch Concordance per the instructions above.
3. Press the camera icon on the bottom toolbar of Concordance.
4. Click on an image record. The corresponding image should appear in Visionary.

Dynamic Data Exchange

Visionary can be directed to display images from any application that supports dynamic data exchange (DDE) protocol. DDE is a messaging protocol supported by the Windows operating system. The DDE settings used by Visionary are:

- DDE Server Setting = "Visionary"
- DDE Topic Setting = "Data".
- DDE Command to instruct visionary to load an image "VIEW " + [ImageID Field] (note the space)

Note: Visionary's Document Page Database must be populated with the appropriate data before Visionary will know what to do with a given ImageID that is passed during a DDE conversation.

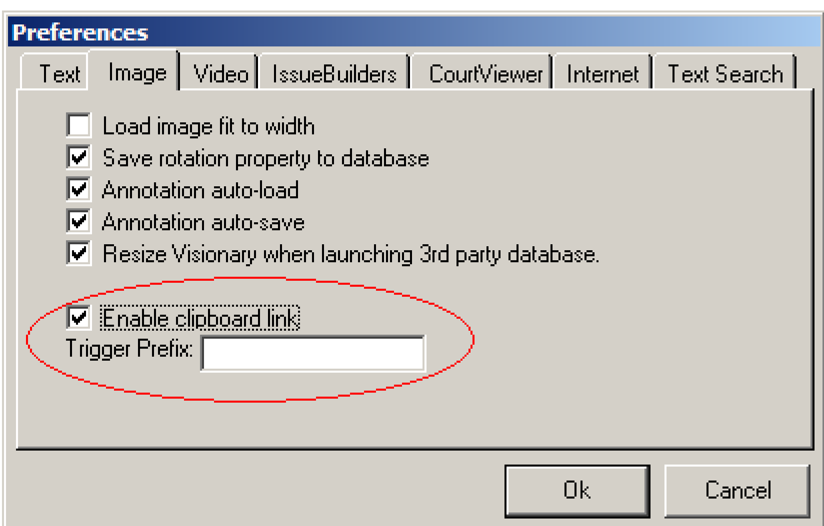
Note: The DDE Monitor Utility Script (see the 'Utilities/Utility Script' menu) can be used to monitor DDE messages being received by Visionary and diagnose problems with the application sending the messages.

See Also: Clipboard Messaging

Clipboard Messaging

Visionary can be directed to display images from any application that uses the Window's clipboard to send messages. To use the clipboard messaging feature that is built into Visionary:

1. Configure Visionary to monitor the Windows clipboard for messages by selecting the 'Options / Preferences' menu item on the Main Window.



2. Check the 'Enable clipboard link' option.
3. If desired, enter a 'Trigger Prefix'. A trigger prefix is a character(s) that Visionary will look for before acting upon anything that it reads from the Windows clipboard.

When something is saved to the Windows clipboard, Visionary will read what was saved. If the value saved starts with the Trigger Prefix or if no Trigger prefix is required, Visionary will check to see if the value added to the Windows clipboard exists in the ImageID field of the Document Page Database.

See Also: Dynamic Data Exchange