Getting Started:

Managing Your Case

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Startup Window

Open
To open an existing case, select the name of the case to be opened and click the 'Open' button.

Create
To create a new case, click the 'Create' button on the Select Case window.

Delete
To delete a case, select the name of the case to be deleted and click the 'Delete' button. This will cause the Case Deletion Warning dialog to appear. Clicking 'Yes' in this dialog will cause Visionary to delete the case from the database as well as all associated files within the CaseID directory.

Backup
The Backup Data feature allows you to backup all or part of your case data, including linked external databases. The backed up files are stored in a PKZIP compatible format with file extension .VBK. Backup files may be used to restore part or all of your case transcripts and databases.

Restore
The Restore/Import 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.

Utilities
The 'Utilities' button allows you to rebuild the following:

- System Database
- Issues Database
- Image Location

- Depo/Sync Database
- Document Database
- Text Indexes

Shortcut Tab Window

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, & Fact Databases

Case Explorer – Lists the deponents, non-synced video files, slides & timelines (coming soon) for your case.

IssueBuilders – Lists all the IssueBuilders for the case.

Search Tab – Provides quick access to creating test & database queries.

Case Explorer Window

The Case Explorer is used to view the list of depositions and non-synced video files available for your case. The toolbar buttons are explained below.
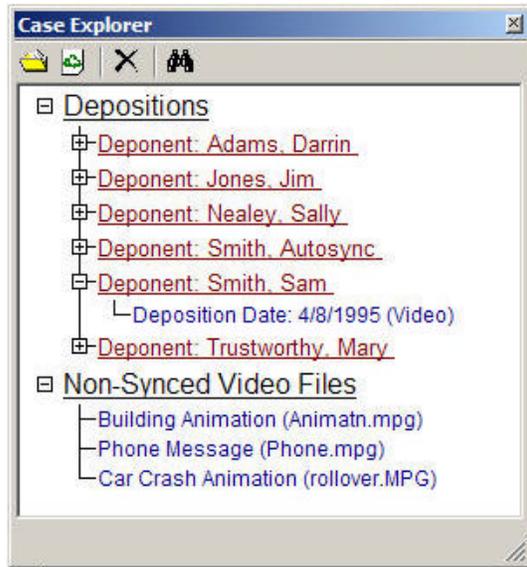
 Open selected transcript

 Refresh transcript list

 Delete selected transcript

 Search transcripts

Modifying Screen Layout

Modifying the screen layout in Visionary allows you to configure its main screen for different layouts to facilitate the review of various data types at any one time. To modify the screen layout, go to the View menu and select the desired layout option. You may also access the Screen Layout options buttons from the View toolbar located on the main toolbar.
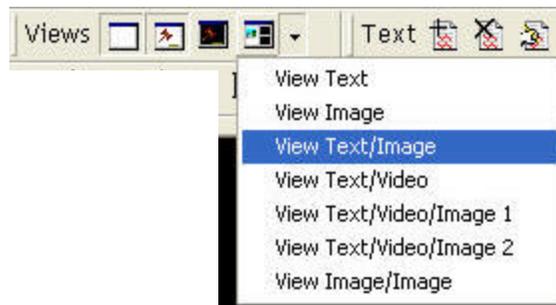
Importing Transcripts

How Import a transcript:

1. Select the "File/Import/Transcript' menu item on the main window.
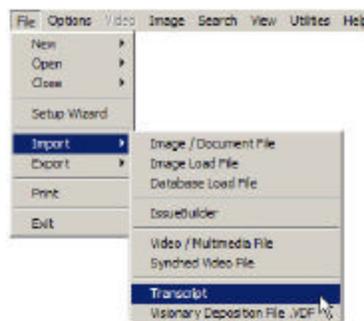
2. Click the '…' to browse to the transcript file and click 'Open".

3. Review the transcript in the left window to make sure everything looks good and click the Next button.

4. Enter the specific deposition information in the appropriate fields such as first, middle, last name and the deposition date.
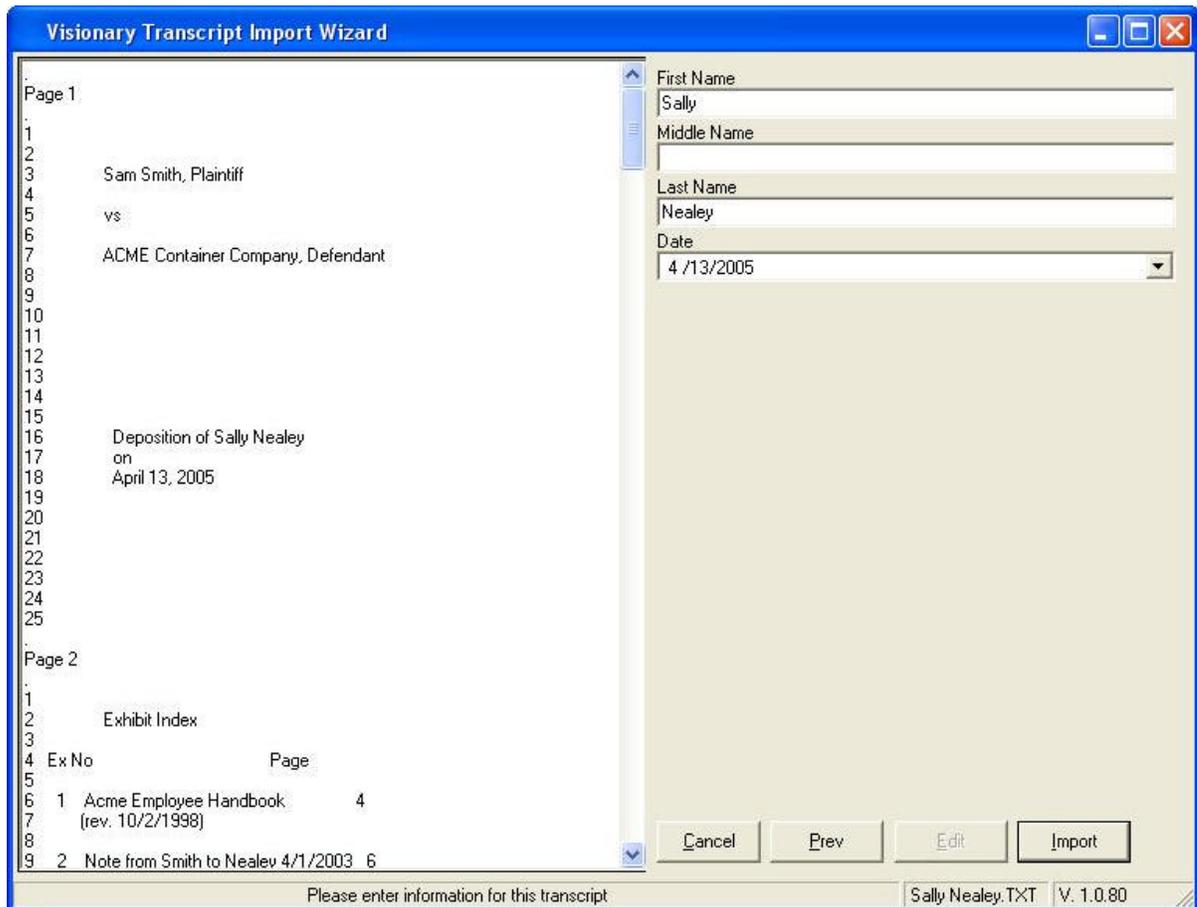
5. Click the import button to complete the import process

6. Upon completion, click the 'Ok' button to close the Transcript Import window.

⬤ *Tip: After importing a transcript, 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.*

Supported File Types:
Visionary 7.1 currently supports the import of standard ASCII transcript files that adhere to the specifications below and LiveNote™ PST files.

ASCII Transcript Import Specifications
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.

● *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.

Recommended by Visionary

● Page breaks or form feeds at the end of every page.

● Page numbers should be at the top of every page.

● 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 the transcript has time stamps, those time stamps should be in the 'hh:mm:ss' format.

Non-ASCII Transcripts

Visionary Sync cannot import transcripts in non-ASCII formats such as WordPerfect. Transcripts in these formats should be resaved into an ASCII format that preserves line breaks. This can be accomplished using the 'File/Save As' menu item in either Microsoft Word or Word Perfect.

Transcripts Without Page or Line Numbers

Visionary Sync requires that transcripts contain page and line numbers. Although there are utilities (including one from Visionary if you ask for it) that 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.

Exporting Transcripts

To export a transcript to ASCII format:

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

2. Click the 'Select' button to Output the file path and select a deposition from the drop down arrow to export. The option is available to include the timestamps as well.

Select a Deposition To Export

Output file path:

C:\Smith.TXT [Select]

Deposition to export

Smith, Sam 4/13/2005 ▼

☐ Include TimeCodes

[Export]   [Cancel]
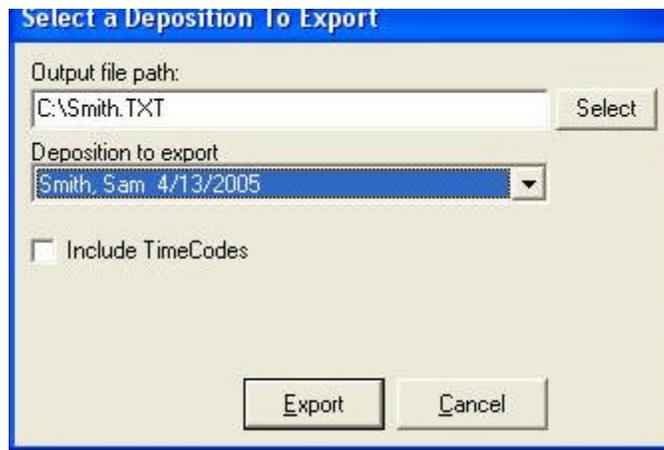
Output file path – Identifies the path and file name of the ASCII file that is to be created

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. Click on the '+' to show the deposition date or simply double click on the Deponent name. Double click on the deposition date 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 date to load the transcript.

Printing Transcripts

To print a transcript:

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 transcript to be printed and set the other print options as required.
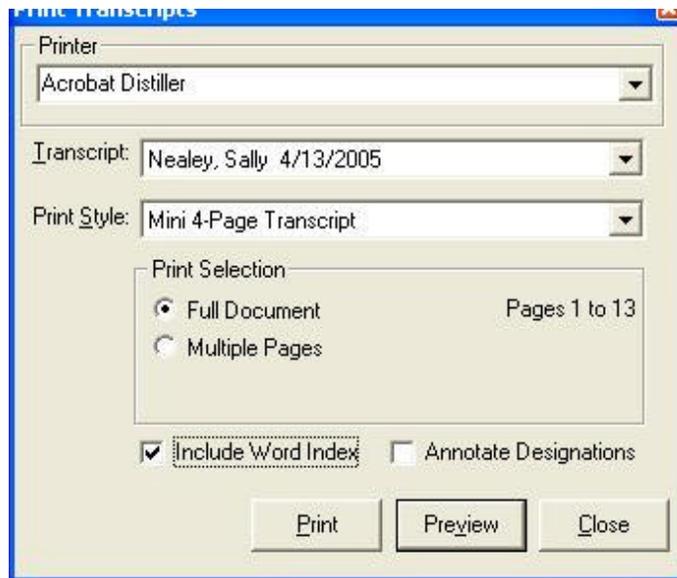
Print Style – Sets the printing format.

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.

Auto-Hyper Linking Exhibits to Transcripts

Visionary 7.1 provides an automated mechanism for hyper linking images to transcripts that can save considerable time over the drag drop method. The automatic hyper linking feature uses Document Database information along with simple word searching and parsing on the transcript to automatically create links between documents and transcript references to exhibits.

🔴 *Warning: An important prerequisite for this feature is that exhibit references be numbers only and that deposition exhibit numbers be unique for all the exhibits in a case, that is, they can't start at one for each deposition.*

To auto hyperlink exhibits to a transcript:

1. Import the transcript that you want to link.

2. Import the scanned images that you wish to link to the transcript.

3. Code the DepoExhibitID field for the documents that you want to link to the transcript in the Document Database. Alternatively, you can import the DepoExhibitID information through a Document Database Load File.

4. In the case explorer, right mouse click on the deposition that you wish to auto hyperlink to display the popup menu and select the 'Add Hyperlinks for Exhibits' menu item.

How Auto Hyper Linking Works

Visionary's auto hyper linker works by searching the selected deposition for the word 'Exhibit' and then looking for a number immediately after. If it locates a number, then it searches for that number

in the DepoExhibitID fielding the Document Database. If it finds a match, it creates a link to the document that it located in the database.

Hyper Linking Images to Transcripts

To hyperlink an image to a transcript manually:

1. Switch to Text/Image View using the tabs at the bottom of the main window or using the 'View' menu item on the main screen.

2. Load the transcript in which you want to create the hyperlink.

3. Load the image that you want to hyperlink to the transcript.

4. Highlight the word or words in the transcript that you want to link the current image to.

5. Drag the image drag icon over to the transcript (anywhere is fine, you do not need to drop directly on the selected text).
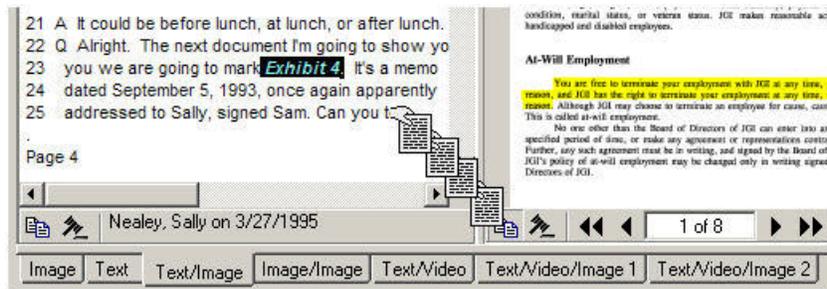
Alternative:

The drag icon on the Document Database window may also be used to create links.

Deleting Hyperlinks

To delete a single hyper link:

1. Load the transcript that contains the link to be deleted.

2. Right mouse click on the link to be deleted and select 'Yes' in the delete confirmation dialog.
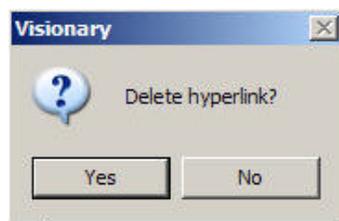
To delete all the hyperlinks for a deposition:

1. Select the deposition for which you wish to delete all the hyperlinks in the Case Explorer region of the Shortcut Bar.

2. Right mouse click to display the popup menu and select the 'Delete all hyperlinks' menu item.

Playing Synchronized Video

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

1. Switch to the 'Test\Video' screen layout.

2. Load the transcript by double clicking on the deposition date in the Shortcut Bar.

3. Select 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.

Searching Data

Overview

Visionary provides the ability to search transcripts, OCR files, user notes, and document databases.

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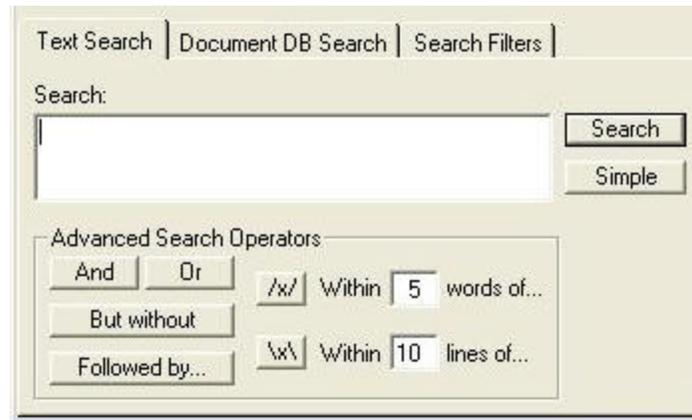
- Search Text Box – Enter the search parameters (words, phrases, and/or search operators).

- Search Button – Execute the specified search.

- Advanced Button – Causes the Boolean and proximity to be displayed

Image DB Search Tab

The Image DB Search tab is used for performing searches on the Document Database.
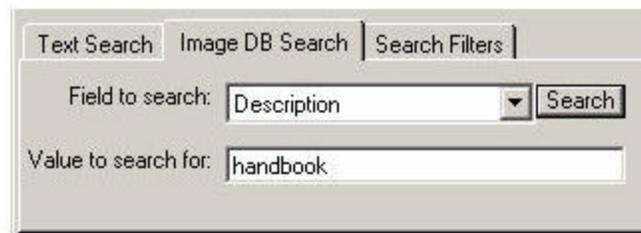
- **Field to search text box** – Select the Document Database field to be searched.

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

- **Search button** – Execute the specified search

Search Filters Tab

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

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

- **Deponents** - Causes the Deponents Filter Dialog box to be displayed.
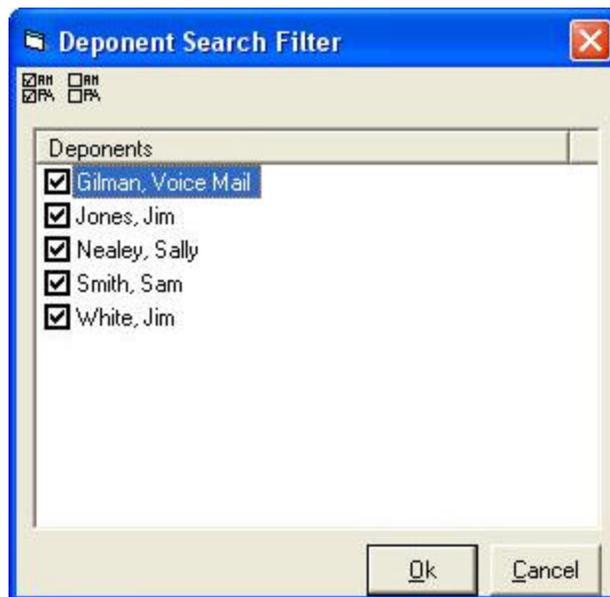
Searching Transcripts, OCR & Other Text

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.

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3. On the search window, select the 'Text Search' tab.

4. Enter the words or phrase that you wish to search for.
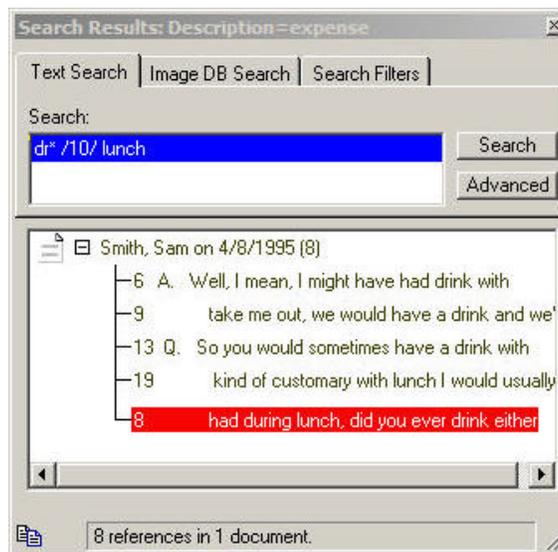
5. If desired, you can press the 'Advanced' button to reveal the Advanced Search Operator assistant.

6. Press the 'Search Button'.

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, which 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'.

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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'.

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 the deponents you need to search.
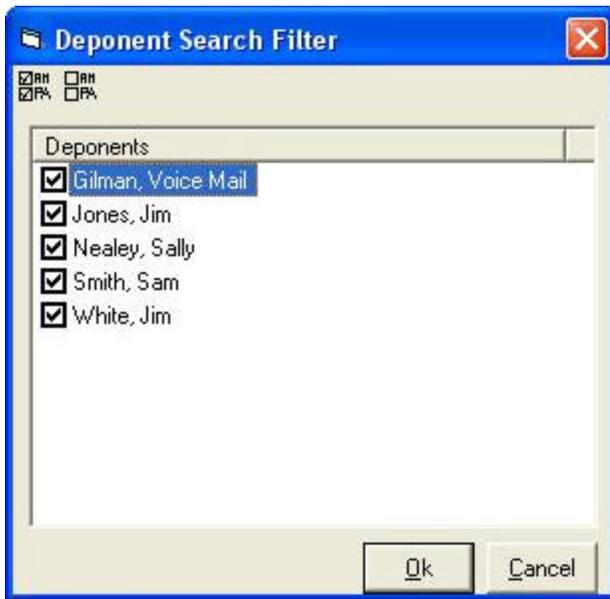
☑AN
☑PA - Select all deponents

☐AN
☐PA - Select no deponents

4. Press 'Ok'

5. Switch to the 'Text Search' tab and perform your search.

Page 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.
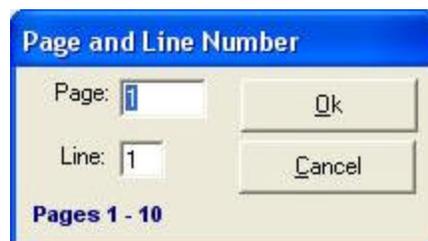
Displaying Images

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.

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.

3. Use the image navigation bar located under the image display window to move through the population of images.
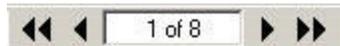
Navigating Through Images

To move to the next or previous document or page:

Use the navigation toolbar located under the images.

  << - 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:

Click on the page text box, enter the page that you wish to jump to, press the 'Enter' key.
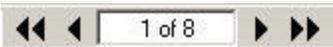
Image Annotations

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

Icon	Description	Shortcut
	Crop Zoom	Ctrl+1
	Highlight	Ctrl+2
	Redact	Ctrl+3
	Square	Ctrl+4
	Circle	Ctrl+5

|			
	Line		Ctrl+6
	Arrow		Ctrl+7
	Zoom		Ctrl+8
	Scroll Page		Ctrl+9
	Annotation Selector		Ctrl+0
	Text		Ctrl+=
	Fit-to-Height		Ctrl+H
	Fit-to-Width		Ctrl+W
	Rotate		Ctrl+[Arrow Keys]
	Scale-to-Gray		
	Exhibit Sticker		
	Clear All Annotations		Ctrl+D
	Save Image View – If the current image was loaded from an IssueBuilder, this updates the image view (annotation, rotation & zoom) properties for that IssueBuilder item.		
	Annotation Properties – Sets color, font & line thickness properties.		

To add an annotation to an image:

1. Select on any of the annotation icons located on the Main Window, CourtViewer Window, or CourtViewer Control Window's image toolbar.

2. Press the left mouse button anywhere in the image region and drag the mouse to size and position the annotation.

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.
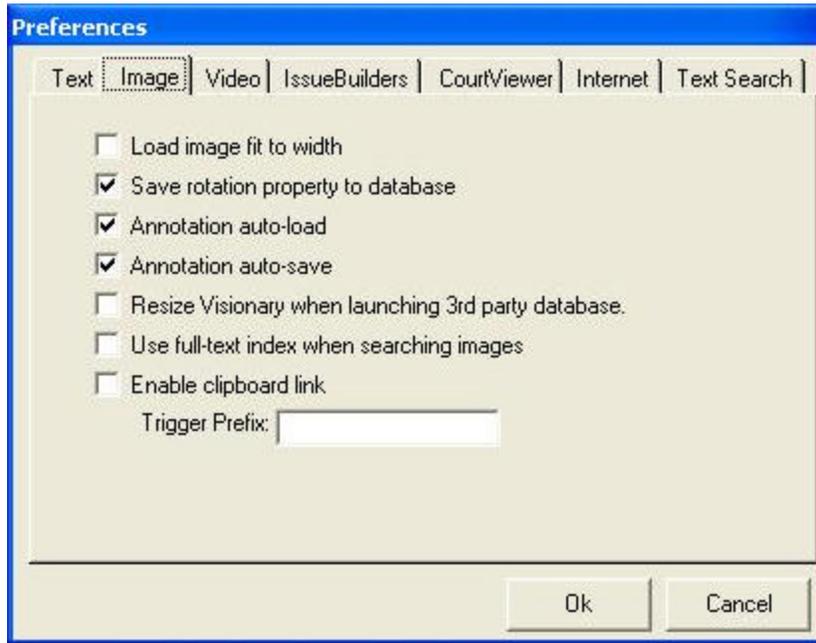
2. Display an image.

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 do 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.*

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.
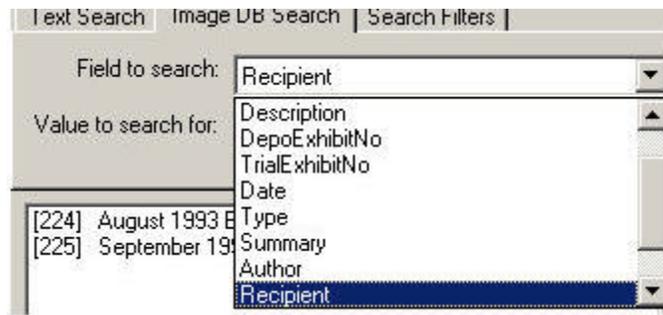
4. Enter the word that you wish to search for and press the 'Search' button.

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.

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 and drop it in 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.

Print Manager Window

Visionary's Print Manager offers a wide array of printing capabilities, enabling you to print IssueBuilders, Images, Notes, Text and several forms of reports. The Print Manager can be accessed by clicking on the Print Manager icon on the main window's toolbar or by selecting 'File / Print' menu item on the main window. All tabs of the Print Manager contain the following three buttons:

Printer Setup

Clicking on the Setup button will display the current default printer information. To select a new printer, go to the go to the Windows start menu, select Control Panel, and then select Printers. It will list all the useable printers, plus the option to add a new printer. Click on the desired printer and then select "Set as Default" under the File Menu on the Printers Folder.

Print

Clicking on the Print button will print the selected information according to the settings in the Print Manager window. This will print to the default printer that is set up in your Windows Control Panel.

Print Preview

While in Print Preview mode, there are several ways of manipulating the preview screen. To zoom in on the preview, double click the left mouse button on the area you wish to enlarge. To zoom back out, double click the right mouse button. To go to the next page, you can simply click on the Next button, or you can hold down the shift key and double click the right mouse button. Similarly, to go to the previous page, you can select the Previous button or hold shift and double click the left mouse button.

Printing IssueBuilders

To print an IssueBuilder:

1. Select the 'File / Print' menu item on the main window or press the 'Print' icon ![icon] on the toolbar of the main window.

2. Select the IssueBuilder to be printed.

3. Set the other print properties as desired.
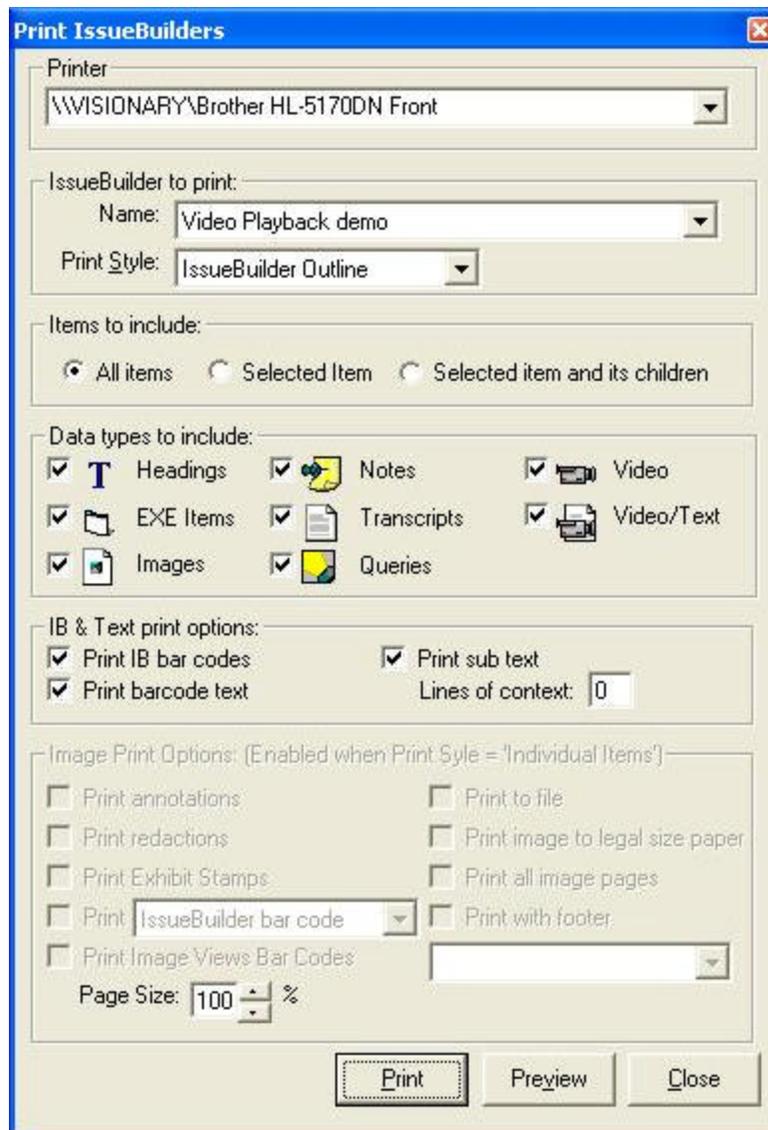
Print Style – IssueBuilder Outline prints the IssueBuilder in an outline format that mimics what you see when viewing an IssueBuilder in Visionary.   3 X 10 prints the IssueBuilder in a bar code format suitable for printing on Avery labels.

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 IssueBuilder 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 on each IssueBuilder.

Image Print Options – 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 ![icon] 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.
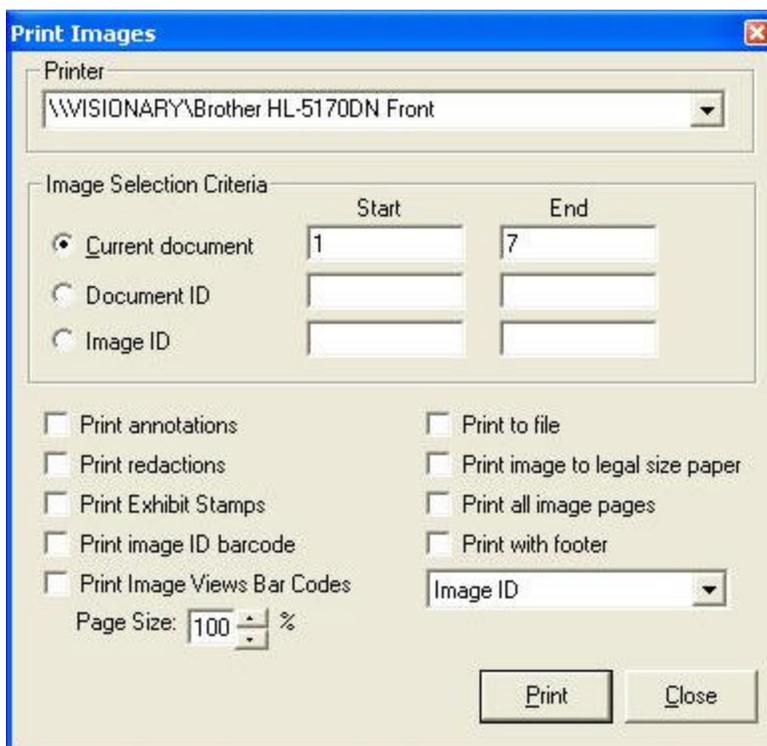
Print with annotations – Prints any annotations associated with the images.

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

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

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

Print exhibit stamps – If checked, prints exhibit stamp on each image.

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.

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 on the toolbar of the main window.

2. Select note to be printed.
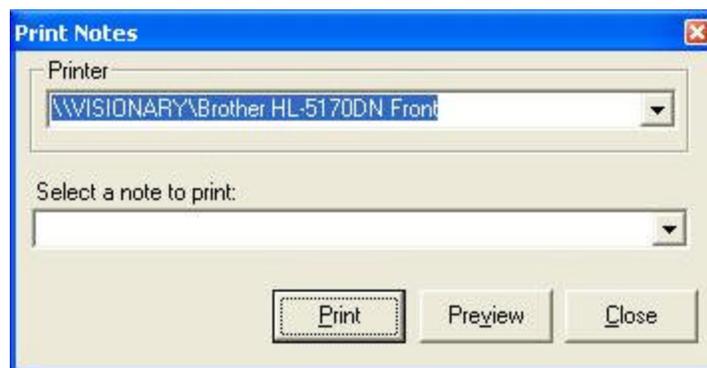
3. Press the 'Print' or 'Preview' button.

Printing Reports

To print a report:

1. Create the desired report by going to "Reports".

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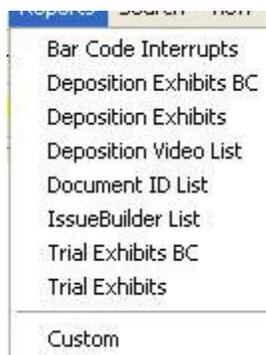
Bar Code Interrupts - Prints bar code labels for special bar codes that will send commands to Visionary, such as Play, Stop, Pause, Black Out Screen, and commands to step through an IssueBuilder outline.   These bar codes allow you to control Visionary during court presentations without being near the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

Deposition Exhibits BC – Prints the deposition exhibits with barcodes.

Deposition Exhibits – Prints the deposition exhibits without barcodes.

Deposition Video List – Prints the deposition video files in a case.

Document ID List – Prints a list of Document ID's and descriptions.

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

Trial Exhibit BC – Prints the trial exhibit barcodes.

Trial Exhibits – Prints the trial exhibits without the barcodes.

Custom – Print custom reports including Depositions, Deposition Video, Documents, Documents Page, Facts and the IndexPage.
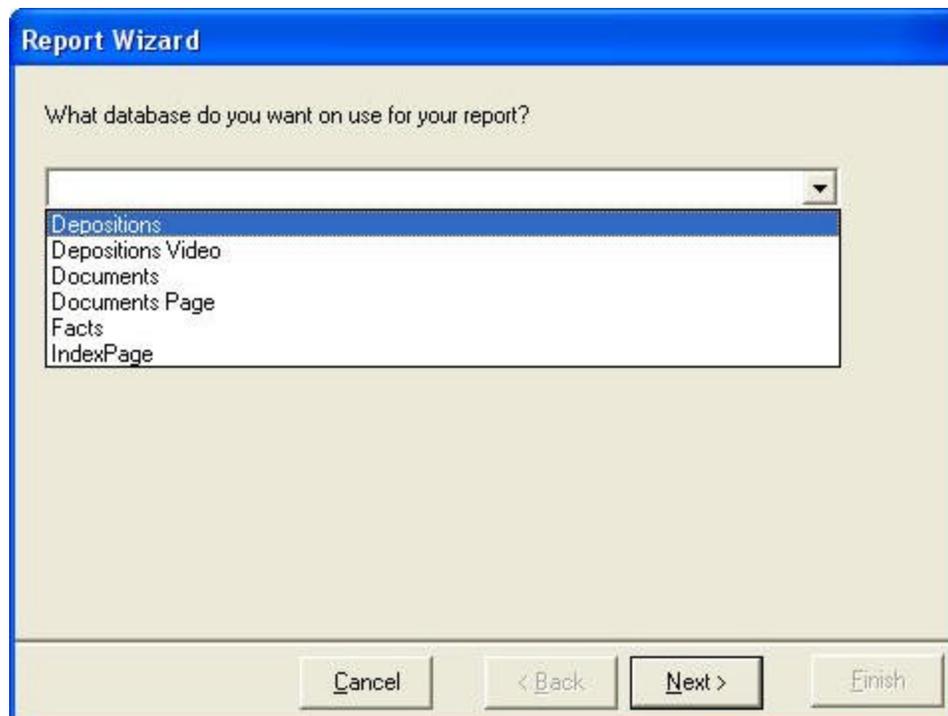
3. Press the 'Print' button.

IssueBuilder Window

IssueBuilders are digital outlines that enable end users to hierarchically organize thoughts, user notes, transcript references, video clips, and annotated images. IssueBuilders also provide the foundation for Visionary's sophisticated presentation scripting features.
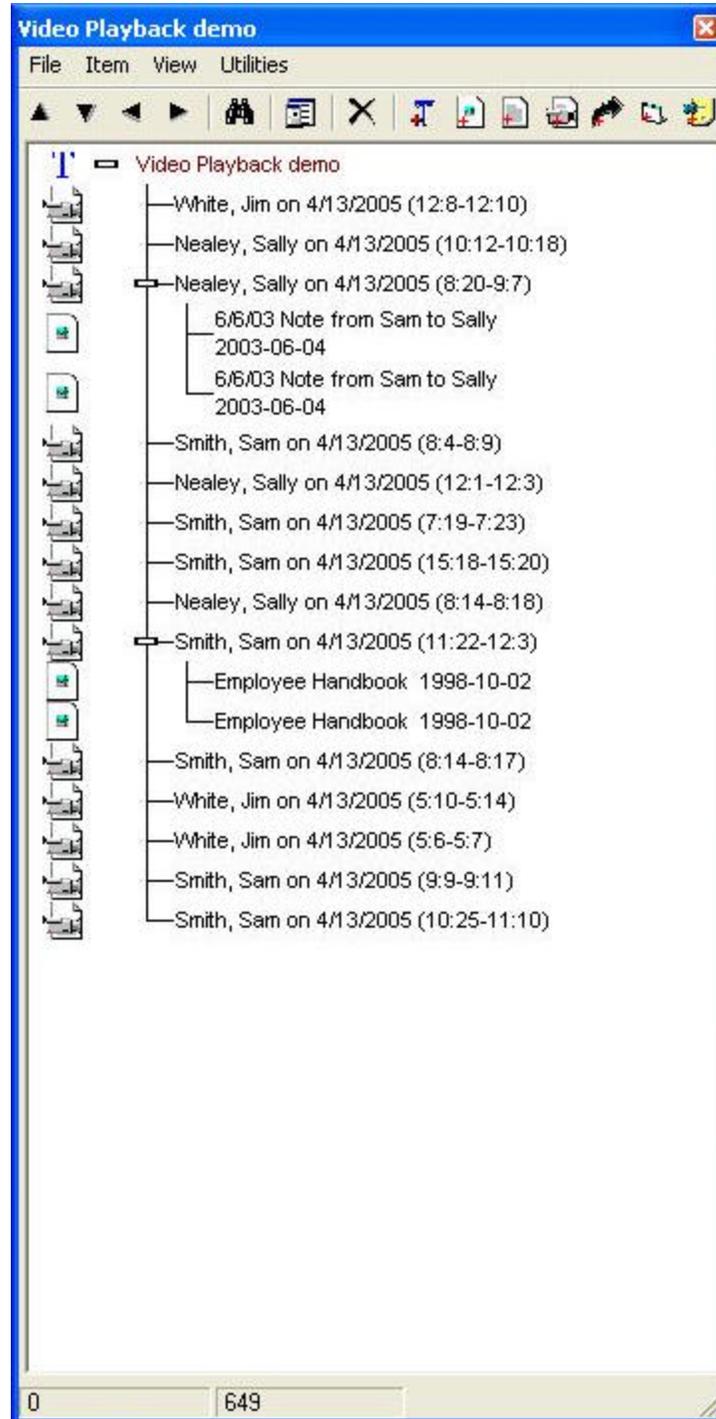
Save – Saves the current state of the IssueBuilder to the database

Print – Displays the Print Manager

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Export – Provides options to export the IssueBuilder or to create video clip files for all of the video clips contained in the IssueBuilder

Close – Closes the IssueBuilder window

Item Menu

Add Item – Presents a list of items that can be added to the IssueBuilder (same functionality that is offered by the toolbar.

Run – Causes the currently selected IssueBuilder Item to be displayed (except headings).

Expand Outline – Makes all indentation levels visible

Contract Outline – Makes only first indentation level items visible

Mark Item – Adds or removes a '**' mark from the beginning of the selected IssueBuilder item(s)

Edit – Displays a dialog that allows you to modify the selected item's description

Properties – Displays the IssueBuilder Properties Window

Insert Item from Global IB Item List - Presents a dialog for selecting IssueBuilders contained in the Global Issue Pool list. See the Using the IssueBuilder Global Pool topic.

Convert – Provides mechanism for converting text clips to text-video clips and visa versa

Word Wrap Item Descriptions – controls whether or not the IssueBuilder item descriptions will word wrap

Delete – Deletes the currently selected IssueBuilder Item(s)

Find – Presents a dialog box for doing a text search for the selected IssueBuilder

Find Next – Locates the next IssueBuilder with the current search criteria

Utilities Menu
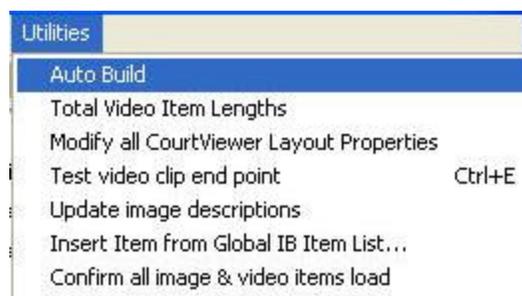
Auto Build

    Add range of images - Allows user to add a group of images based upon database field values.

    Add deposition test clips – Creates a random set of video clips for the purpose of confirming sync and video quality.

Total Video Item Lengths - Displays the total video playback length the specified video items within the IssueBuilder

CourtViewer display properties for all the items in the IssueBuilder

Test Video Clip End Point – Plays the last 5 seconds of the currently selected video clip

Update Image Descriptions - Displays a dialog for modifying all descriptions for Image Items in the IssueBuilder using specified field(s) from the Document Database or Document Page Database.

Insert Item from Global IB Item List – Select and choose to insert an item from the Global IBer from sorting by description, data type, original IssueBuilder or IB page/ data type.

Confirm all image & video items load - This will confirm all images and video files load properly.

Issue Builder Data Types

The following types of data files can be saved to and retrieved from an IssueBuilder. The icon to the left of each IssueBuilder item provides rapid identification of the data type referenced by that item.

T Heading
The Heading data type can be added to IssueBuilders for organizational purposes. Headings can be displayed and moved just as other data types.

Text/Video
The Text/Video data type indicates an item wherein video is synchronized to text. When these items or "clips" are accessed, the text is displayed on the left half of the screen while the corresponding video is displayed in the upper right quarter of the screen. Or, if CourtViewer mode is enabled, the video is displayed in a full-screen mode. The corresponding text can also be displayed with the video in CourtViewer mode, if the Show Text option is enabled in IssueBuilder Item Properties.

Video-only items have no corresponding text, and may be animations or other types of video. Video-only files are displayed in the upper right quarter of the screen, or full-screen if CourtViewer mode is enabled. They are sometimes referred to simply as "Other Video."

Text
The Text data type refers to text-only segments with no associated video. Text-only segments are displayed in the text window on the left half of the screen or full-screen when CourtViewer mode is enabled.

Documents and Images
This data type is for images that are scanned or imported. Images are loaded into the active image window or displayed full-screen if CourtViewer mode is enabled.

Notes
These items are created through the Notes feature of Visionary. When retrieved, Notes are displayed in the pop-up Notes window. They may also be displayed full-screen if CourtViewer mode is enabled, and can be included in text searches.

➡ <u>Move Item</u>

A Move Item is used when you wish to move an IssueBuilder item to a new location, during a CourtViewer presentation.

🖼 <u>Shell Execute Item</u>
A Shell Execute Item will run a program outside of Visionary or in the case of PowerPoint you can launch a slide or a presentation in CourtViewer mode. Shell Execute items are also referred to as Application Documents under the Item menu from within an IssueBuilder, and as Program Executes from the IssueBuilder toolbar. For example, you can set up a Shell Execute item to open and display a text file in Notepad.   For more information on how to perform a Shell Execute, see Shell Execute Properties.

📹 <u>Video</u>
The Text data type refers to text-only segments with no associated video. Text-only segments are displayed in the text window on the left half of the screen or full-screen when CourtViewer mode is enabled.

Adding Headings

<u>To add a heading to an IssueBuilder</u>

1. Open the IssueBuilder that is to receive the new heading

2. Highlight the IssueBuilder item directly above the location where you want the new heading to be placed.

3. Select the 'Item / Add / Heading' menu item or press the 'Add Heading' icon 🔲 on the toolbar

4. Enter the description for your new heading and press 'Ok'

Enter heading description

[   ]

[<u>O</u>k] [<u>C</u>ancel]

Adding Images

🖼 *Note: When you add an image to an IssueBuilder, you are actually creating a link to the image file as opposed to creating a copy of the image file. In addition, IssueBuilders store the zoom position and annotation settings from the image-viewing window.*

<u>Drag Drop Method</u>

<u>To add an image to an IssueBuilder using Drag/Drop:</u>

1. Open the IssueBuilder that is to receive the image

2. Load the image that you wish to add to the IssueBuilder

3. Drag and drop the text Drag Icon (located under the image window) onto the IssueBuilder. If you drop on an empty area of the transcript, the clip will be added to the end of the IssueBuilder. Otherwise, the item will be added as the last child of the item that you drag to.

Toolbar or Menu Method

To add an image from the IssueBuilder toolbar or menu:

1. Open the IssueBuilder that is to receive the image

2. Load the image that you wish to add to the IssueBuilder

3. On the IssueBuilder window, select the 'Item / Add / Image' menu item or press the 'Add Image' icon on the toolbar.

Adding Transcript Clips

There are several ways to add transcript clips to IssueBuilders. Each of these methods is outlined below.

Drag Drop Transcript

To add a transcript clip to an IssueBuilder:

1. Open the IssueBuilder that is to receive the new clip

2. Highlight the section of the transcript to be added to the IssueBuilder

3. Drag and drop the text Drag Icon (located under the text window) onto the IssueBuilder. If you drop on an empty area of the transcript, the clip will be added to the end of the IssueBuilder. Otherwise, the item will be added as the last child of the item that you drag to.

Clip Dialog

To add a transcript to an IssueBuilder with the Clip Dialog:

1. Open the IssueBuilder that is to receive the new clip

2. Select what is to be the parent item of the new clip. (to add a clip to the end of an IssueBuilder, select the first item)

3. (Optional) Highlight the section of the transcript to be added to the IssueBuilder

4. Press the Add Transcript Clip icon or select the 'Item / Add / Transcript Clip' menu item from the IssueBuilder Window

5. Modify the clip properties as needed
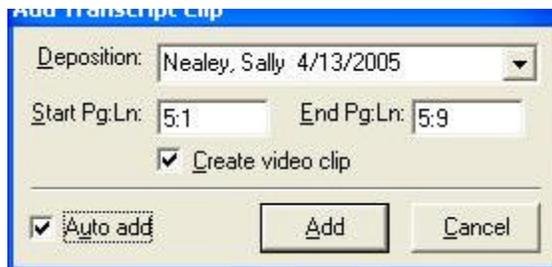
Deposition – Identifies the deposition source

Start Pg:Ln – Start page and line for the clip

End Pg:Ln – End page and line for the clip

Create Video Clip – Option to make clip a text-video clip rather than a text clip

Auto add – If checked, the Add Transcript Clip window will stay up for purposes of multiple clips.

6. Press 'Add'

Transcript Popup Menu

To add a transcript to an IssueBuilder with the Clip Dialog:

1. Open the IssueBuilder that is to receive the new clip

2. Select the text for which you wish to create an IssueBuilder clip

3. Right-mouse click on the transcript to display the transcript popup menu

4. Select the 'Add to Current IssueBuilder' menu item and then select where the item should be placed
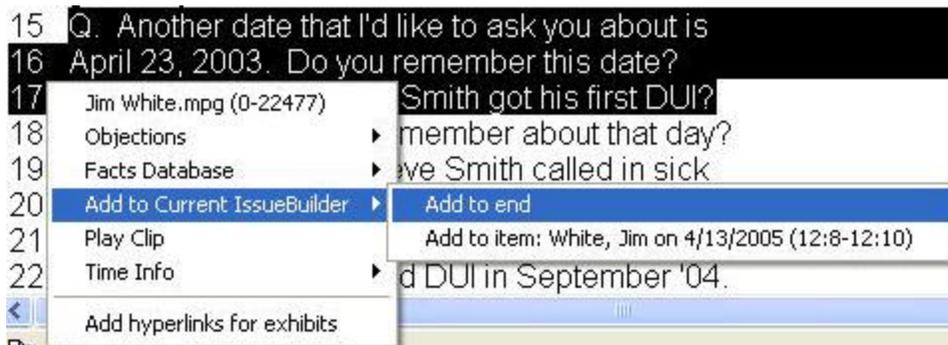
Add to end – Places the new transcript clip at the end of the IssueBuilder

Add to item – Places the new transcript clip as the last child of the currently selected IssueBuilder Item

Adding Video Clips

Synchronized Transcript Clips

To add a video clip to an IssueBuilder:

1. Open the IssueBuilder that is to receive the new clip

2. Select the text for which you wish to create an IssueBuilder clip

3. Select the 'Item / Add / Video Clip' menu item or press the 'Add Video Clip' toolbar button [icon] on the IssueBuilder window.

4. Adjust the clip parameters as needed in the clip editor dialog

Clip Description – The description that is displayed in the IssueBuilder.

Start/End Page: Line – Page line start and end that will be displayed when this clip is selected

Mark In/Out – Uses the current video position to sets either the start or end video time. These can be used while the video is playing

Play Start/End – Plays the start or end (last five seconds) of the clip

Freeze at end – Option to have the clip end on a freeze frame rather than clear the screen

5. Press the 'Save As New' button

Non-Synchronized Clips

To add a non-synchronized video clip to an IssueBuilder:

1. Open the IssueBuilder that is to receive the new clip

2. Start playing the video file for which you want to created the clip by double clicking on it in the 'Other Video' section of the Case Explorer

3. Select the 'Item / Add / Video Clip' menu item or press the 'Add Video Clip' toolbar button [icon] on the IssueBuilder window.

4. Adjust the clip parameters as needed in the clip editor dialog

Clip Description – The description that is displayed in the IssueBuilder.

Start/End Page: Line – Page line start and end that will be displayed when this clip is selected

Mark In/Out – Uses the current video position to sets either the start or end video time. These can be used while the video is playing

Play Start/End – Plays the start or end (last five seconds) of the clip

Freeze at end – Option to have the clip end on a freeze frame rather than clear the screen

Playback Speed – Sets the clip playback speed.

Frame by frame playback – Option to playback video one frame at a time; when in this mode the user uses the keyboard to move the video forward one frame at a time.

5. Press the 'Save As New' button

Adding Move Items

Move Items provide a mechanism for moving screen elements during a scripted presentation

To create a new move item:

1. Select the item in the IssueBuilder that immediately proceeds where you want to place the new move item

2. Select the 'Item / Add / Move Item' menu item or press the 'Add Move Item' icon on the IssueBuilder window

3. In the 'New Move Item' dialog select the screen element that is to be moved.
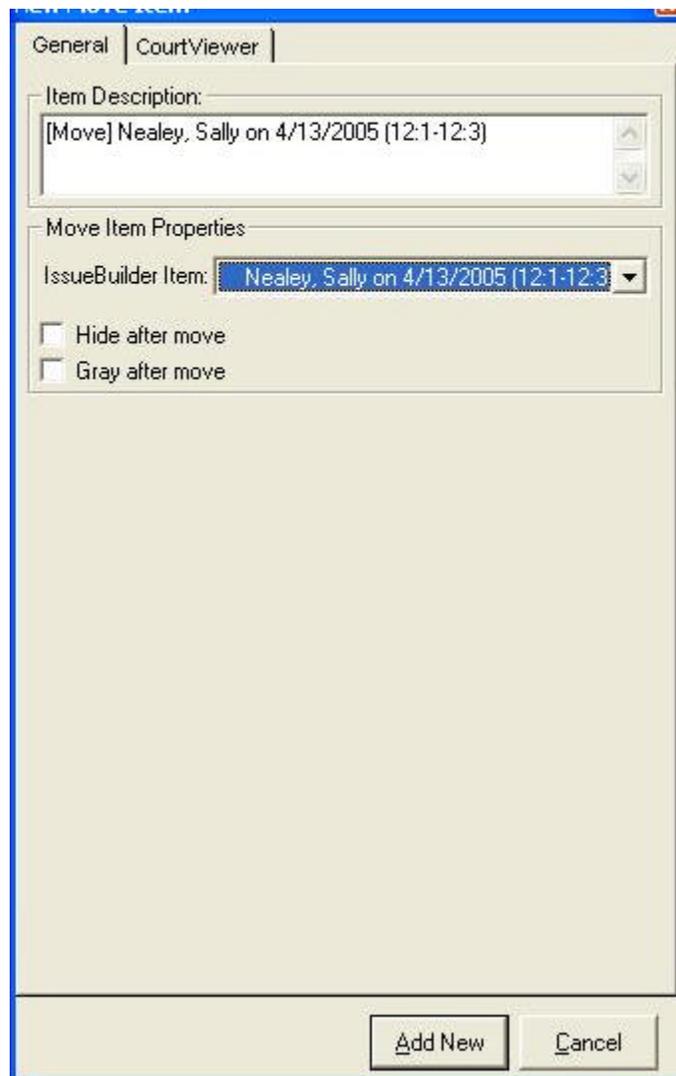
Item Description – The description that will be shown in the IssueBuilder. A description will automatically be entered when you make an IssueBuilder item selection.

IssueBuilder Item – The IssueBuilder screen element that is to be moved. The drop down IssueBuilder list will reveal four standard screen elements (Video Window, Video-Text Window, Title Widow, Next Button) and all of the IssueBuilder items that precede the currently selected item.

Hide after move – When checked, the selected screen element will be hidden

Gray after move – When checked, the selected screen element will be grayed (if that element supports this property)

4. On the CourtViewer tab, set the Move Item's screen position and other settings as you would for any IssueBuilder element.

IssueBuilder Property Window

The IssueBuilder item properties window is used to modify item descriptions create Move Items and manage the CourtViewer scripting features.

To open the IssueBuilder Properties window:

1. Open an IssueBuilder.

2. Select an IssueBuilder item.

3. Press the right mouse button to display the popup menu and select the 'Properties' menu item.

General Tab (Images, Video Clips, Text Clips)
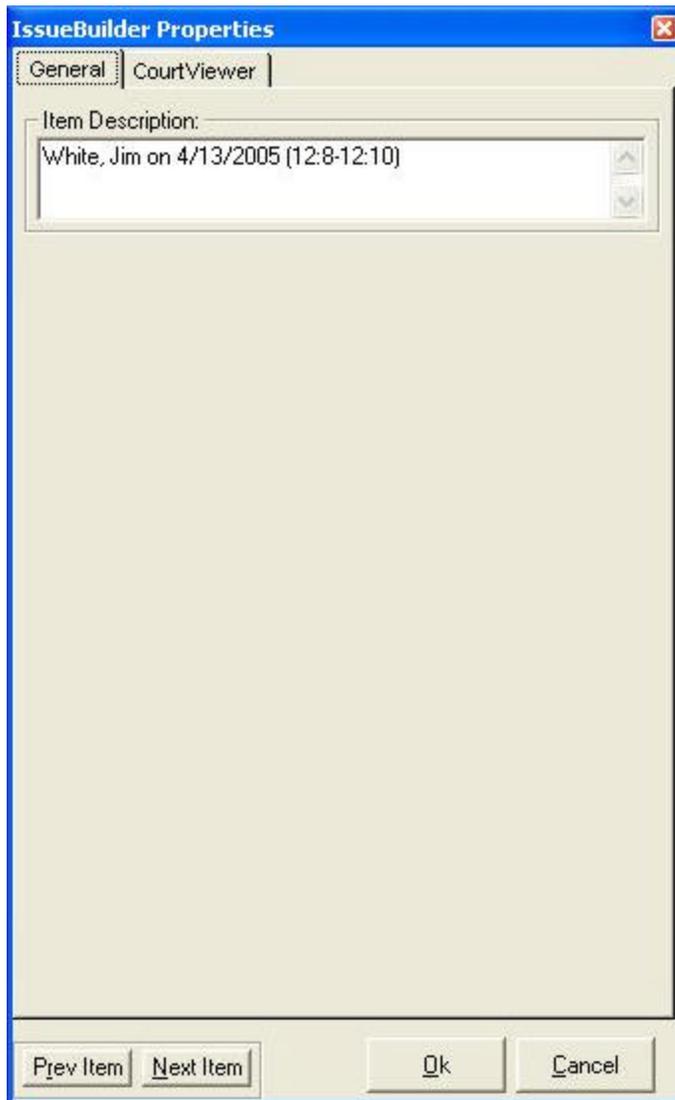
IssueBuilder Properties

General | CourtViewer |

Item Description:

White, Jim on 4/13/2005 (12:8-12:10)

Prev Item | Next Item | Ok | Cancel

Item Description – Designates what description will be displayed in the IssueBuilder for the current item.

General Tab (Move Items)

Item Description – Designates what description will be displayed in the IssueBuilder for the current item

IssueBuilder Item – Designates what IssueBuilder item or screen element will be moved. (Properties on the CourtViewer tab determine how & where things will be moved)

Hide after move – will cause the IssueBuilder item or screen element to be hidden when this IssueBuilder item is run.

Gray after move – Causes the identified IssueBuilder or screen element to be 'Grayed' after the move.
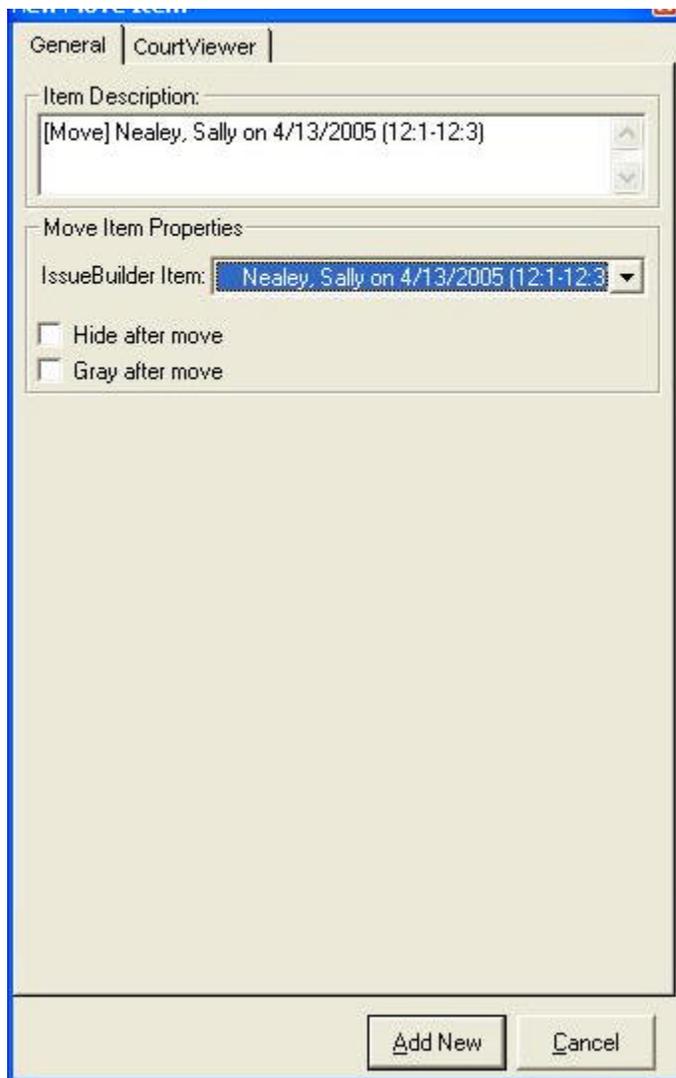
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General Tab (Launch Application Items)

CourtViewer Tab

Item Description – Designates what description will be displayed in the IssueBuilder for the current item.

Execute Program – (default) this option indicates that a third party application is to be run.

Shell to VISI OLE server – Indicates that a custom Visionary OLE server object is to be called.

EXE Name & Path - Identifies the application file to be launched.
Note: If this is omitted, then Visionary will use the file extension of the file name identified in the Command Line parameter to determine what application file should be used.

Command Line – Usually used to identify the data file that the application file should use when opened, but may contain whatever instructions are supported by the application file.

Window Style – Determines how the new application should be opened on the Windows desktop.

Previous Item Clear – Designates what should happen to the IssueBuilder items on the screen when the current item is displayed.

Previous item gray – Sets whether or not items support 'graying' will be grayed when the current item is displayed. Has no effect if Previous Item Clean option clears the screen.

Apply template – This drop down box lists previously defined templates & selecting on will set all the CourtViewer properties to match the template.

Save as new template – Prompts you for a template name & then saves all the current properties with that template.

Show item title – If checked, the IssueBuilder description will be displayed.

Show video text – If checked a window that scrolls the transcript text will be displayed.

Item title color – Sets the title color.

Item title font – Sets the title font type & size.

Starts video position – When checked, this option delays the current item from being displayed until the video reaches the specified frame.

Run next Item – Determine when the next item is run.

Prev/Next buttons – Used to navigate through the IssueBuilder items.

Copying and Moving Items Between IssueBuilders

IssueBuilder items can be copied or moved to other open IssueBuilders by selecting the IssueBuilder item and dragging it to another open IssueBuilder. Hold down the CTRL key while performing this operation in order to drag a copy of the IssueBuilder item, which will leave the item in its original location as well.
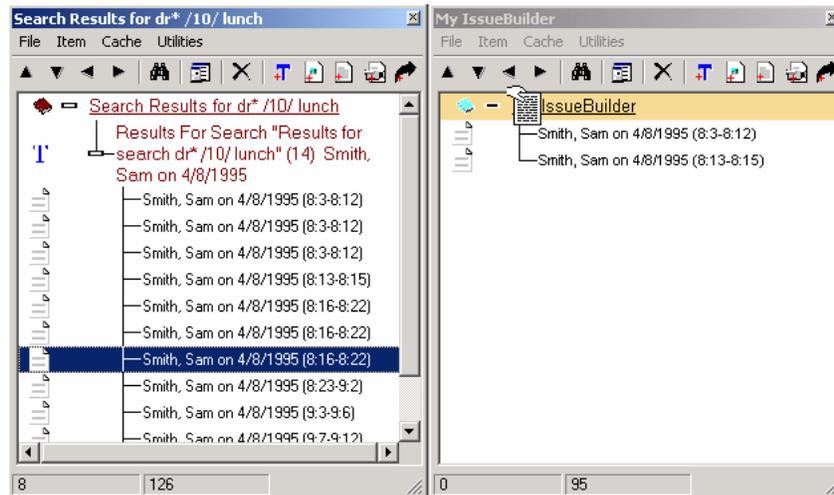
Objection Editing

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.

Text/Objection Toolbar:

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

 - Create objection clip for selected text

 - Delete the currently selected objection

 - Edit the start/end time values for the selected objection

 - 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. Highlight the portion of the transcript that is to be omitted from video playback
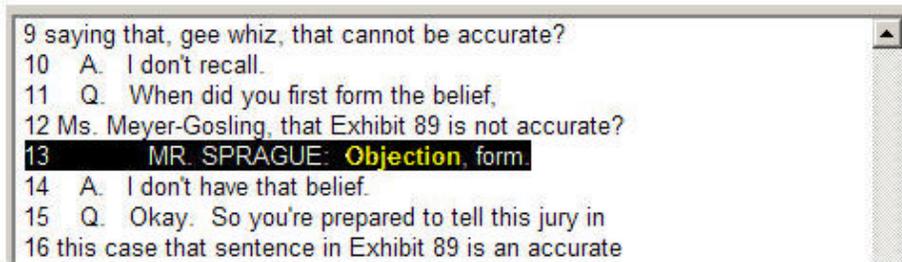

3. Press the 'Add Objection' icon on the main toolbar or select the 'Objections / Add' menu item from the transcript popup menu that displays when you right mouse click on the transcript. The selected text will now appear with a line through it.
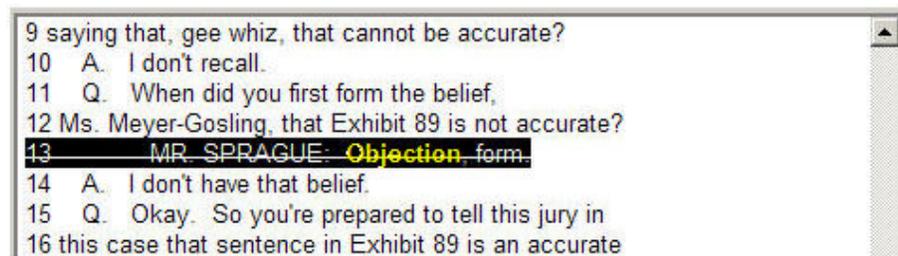
Editing Objection Start & End Times

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
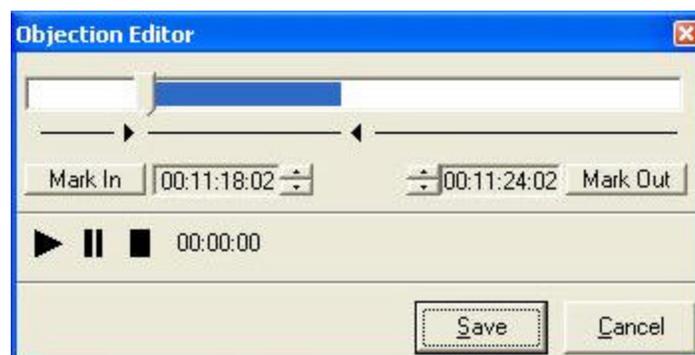
To adjust the start/end points:

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.

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 Facts Digest Wizard, users are able to tell in an instant what facts help or hurt their case, the order in which various events occurred, what legal issues are supported or refuted by the facts, what people are associated with facts, and many other variations of facts as they relate to issues, people, events, time, and importance. Fact coding is a more powerful version of the transcript coding features available in pervious versions of Visionary. In addition, the Facts Database can also be used for tracking all trial designations and counter designations for all parties in a case.

Reviewing Case Facts

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

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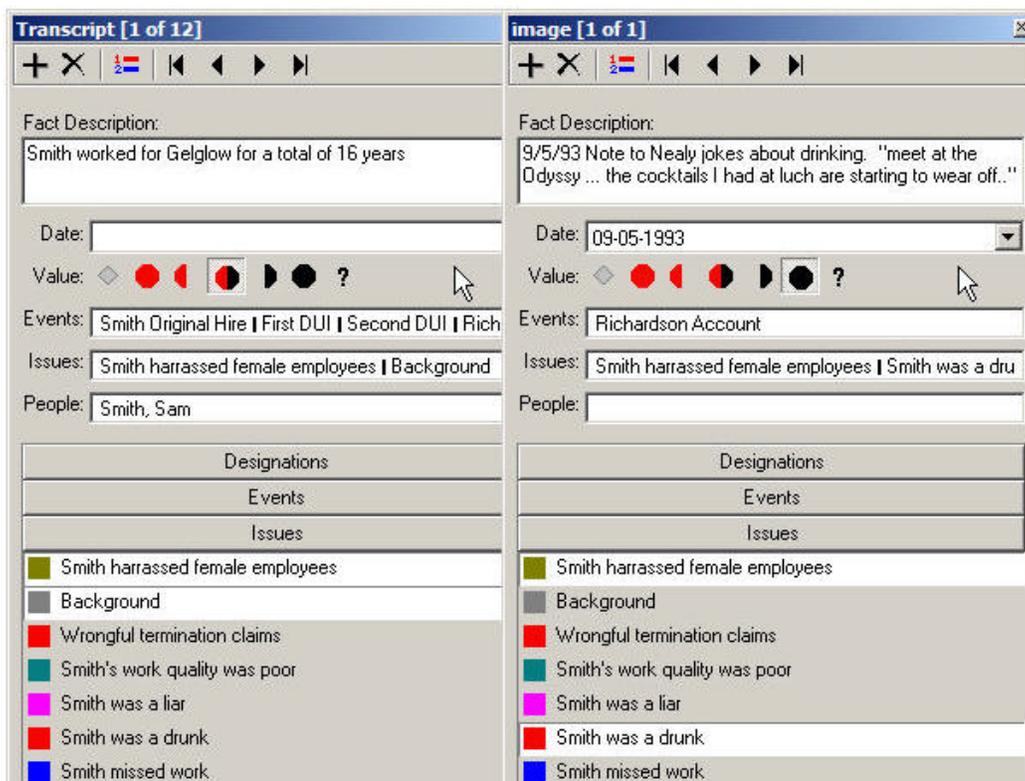
3. To move through the facts for a specific item, use the navigation buttons located at the top of the Facts window

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

1. Select the 'Fact DB' tab on the Short Cut Bar
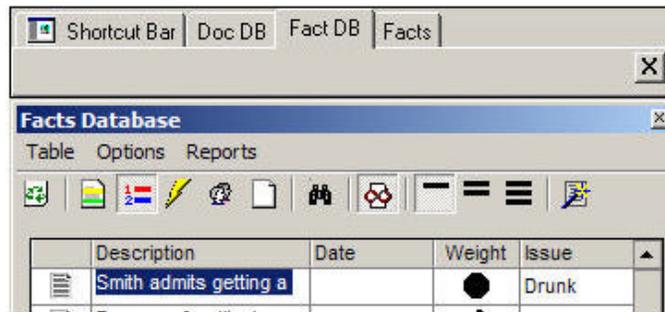
2. Select a fact filter (designations, events, issues, people, or fact description) on the Fact Database window.

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

Facts Database Window

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

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 list of events, issues, and people associated with you case by launching the Events/Issues/People 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 row and column that you wish to edit.   You must enter information in the Description and Short Description fields.   The Short Description field is used in the Facts Database dialog to make it possible to see more columns of information while taking up minimal screen space.
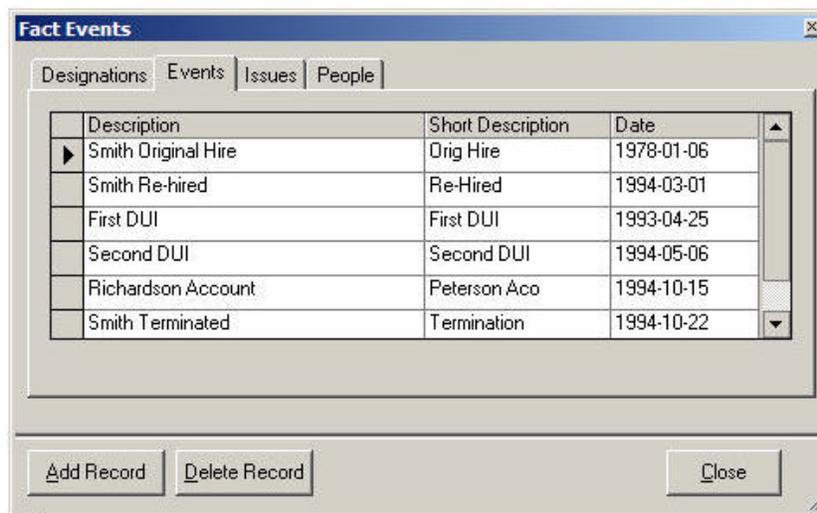
Issues

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 row and column that you wish to edit.   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 Facts Database dialog to make it possible to see more columns of information while taking up minimal screen space.
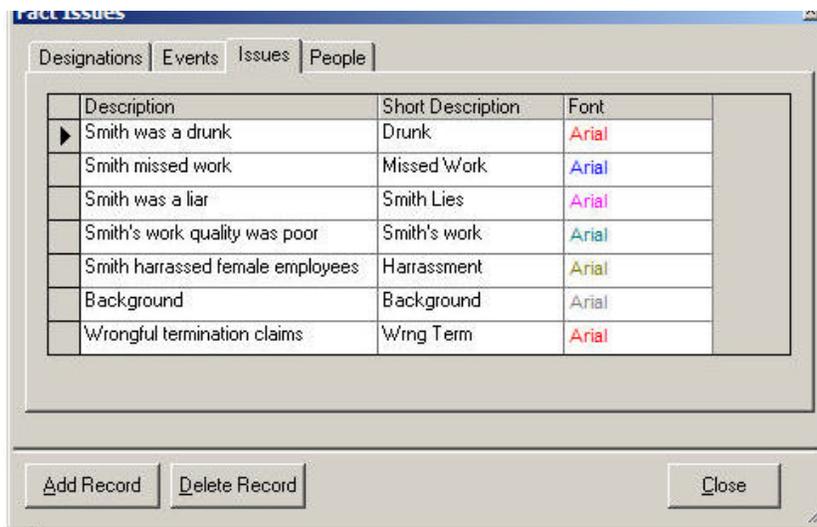
People

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 row and column that you wish to edit. You must enter information in the First, Last and Short Description fields. The Short Description field is used in the Facts Database dialog to make it possible to see more columns of information while taking up minimal screen space.
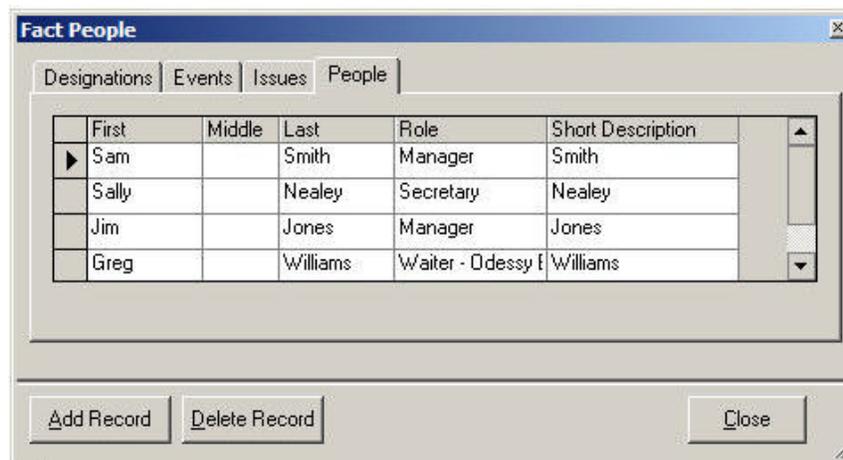
Designations

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 row and column that you wish to edit. 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 Facts Database dialog to make it possible to see more columns of information while taking up minimal screen space.
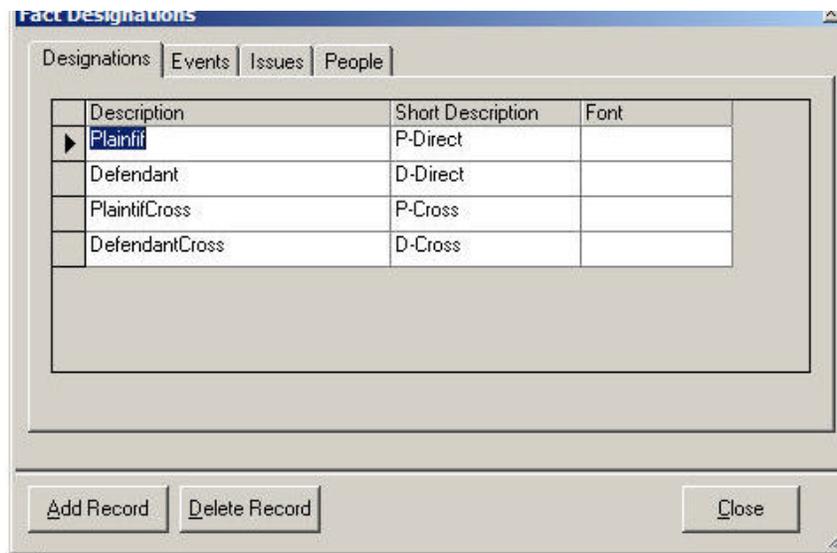
Creating Fact Entries

Creating Facts from Transcript Clips

To define a fact that's 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's associated with part of an imaged document, right mouse click on the image to display the image popup menu, and select the 'Add to facts database' menu item.
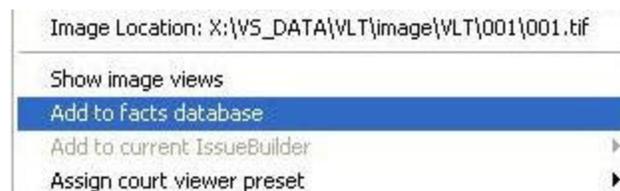
You may also create facts by dragging the image drag icon onto the Facts dialog or by pressing the 'Add' button on the Facts dialog tool bar.

<u>Setting Fact Properties</u>

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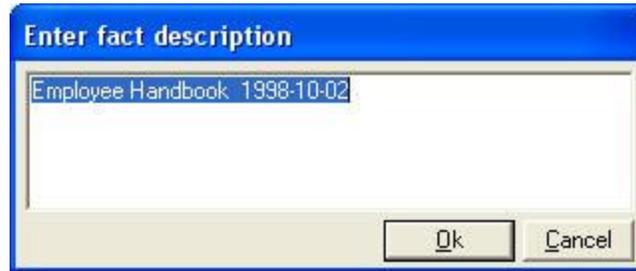
The Facts Dialog window allows you to associate a description, date, weight (value), events, issues and people with the fact.

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.

<u>Value Field</u>

The value field allows you to associate a 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 not set.

 - Fact is very bad.

 - Fact is bad.

 - Fact is neutral.

 - Fact is good.

 - Fact is very good.

 - Don't know if fact is good or bad

<u>Events, Issues and People Fields</u>
The Events, Issues and People Fields display what Events, People, and Issues 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 Facts 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.

<u>To run the Facts Digest Wizard</u>:

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.
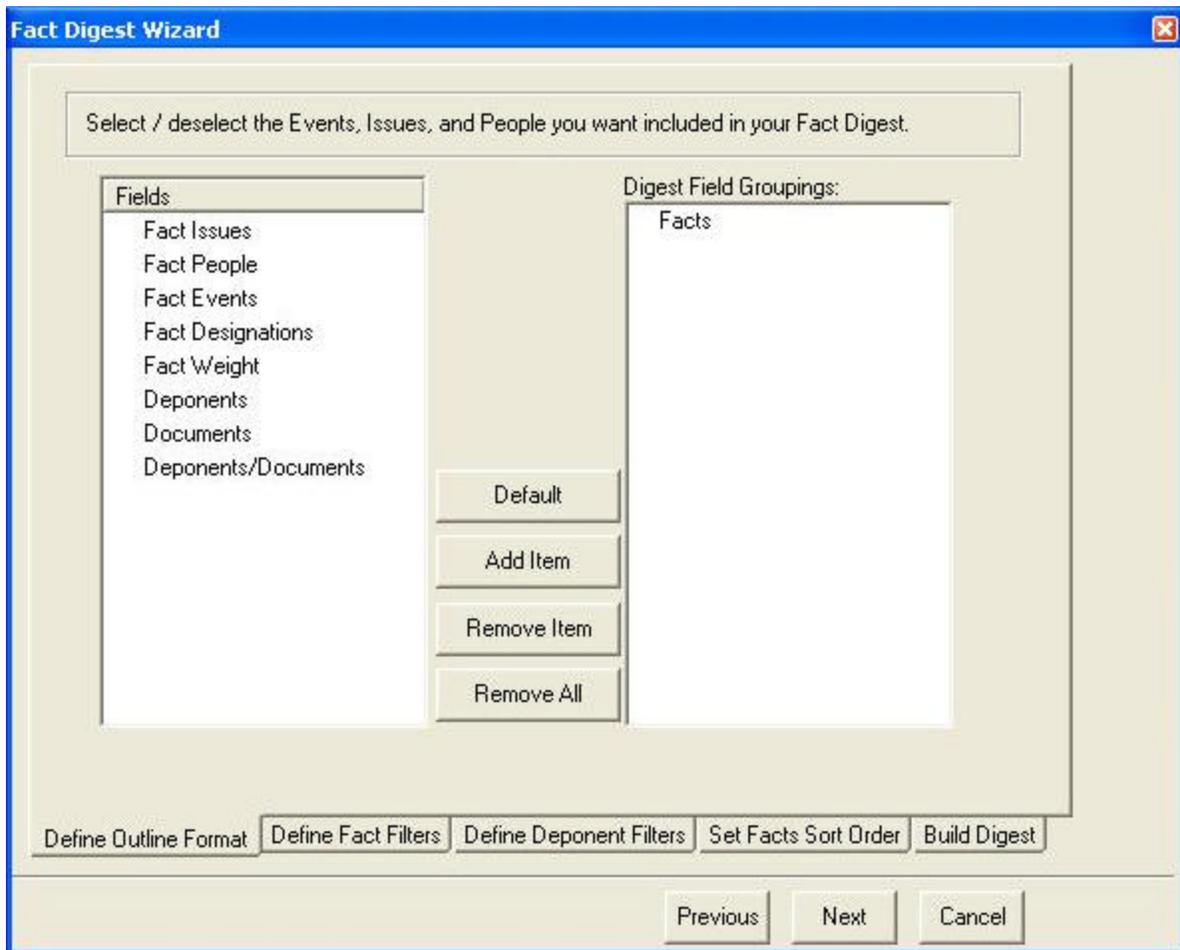
3. Select the Designations, Events, Issues, and People categories to be included in the digest. Any fact that is associated with any of the selected items (as opposed to all of the selected items) will be included in the digest.
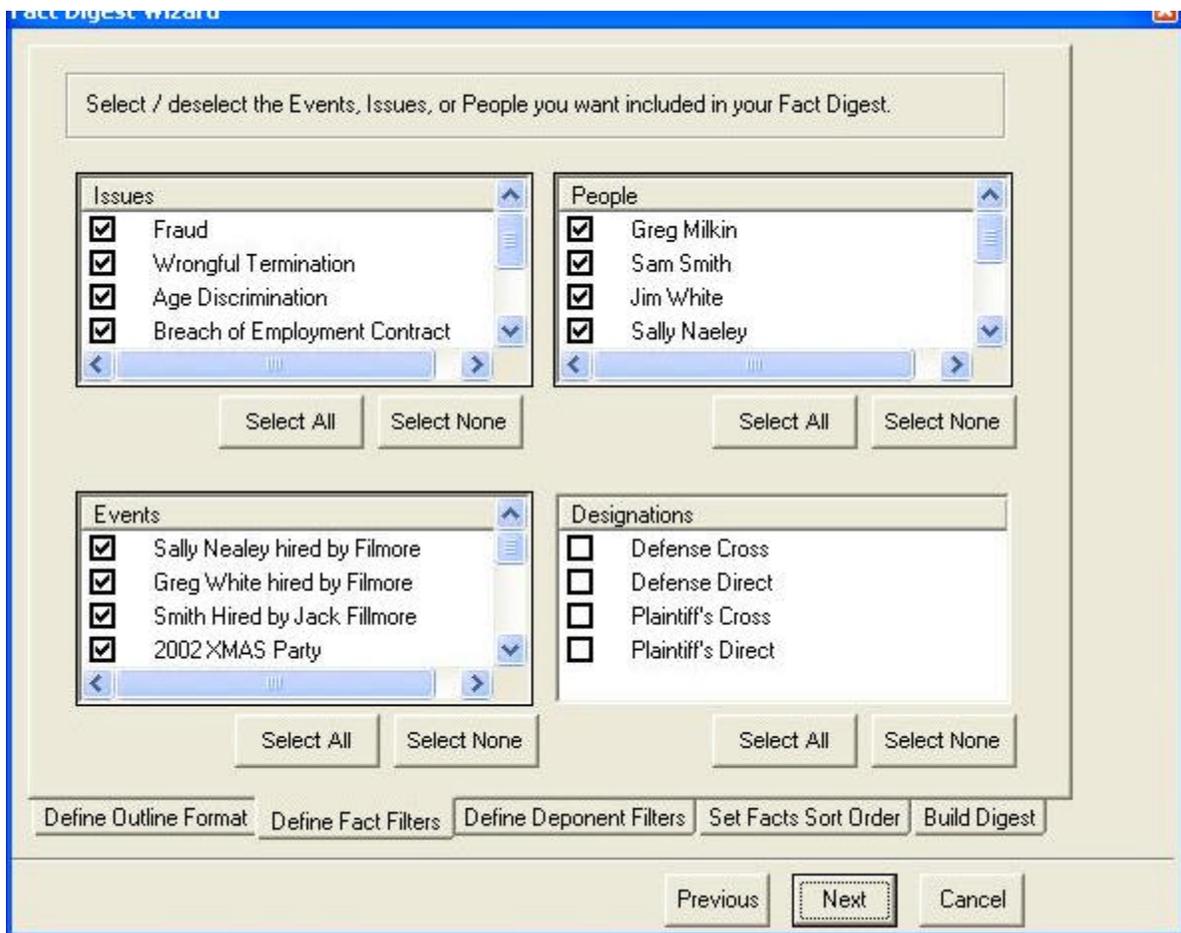
4. Select which deponent transcripts you want included in the digest.

Fact Digest Wizard

Select / deselect the deponents for your Facts Digest.

Deponents

☑ Gilman, Voice Mail
☑ Nealey, Sally
☑ Paul, David Francis
☑ Prather, Irvine
☑ Smith, Sam
☑ Vol. 12, Jan 14, 2005
☑ White, Jim

Select All

Select None

Define Outline Format | Define Fact Filters | Define Deponent Filters | Set Facts Sort Order | Build Digest

Previous | Next | Cancel
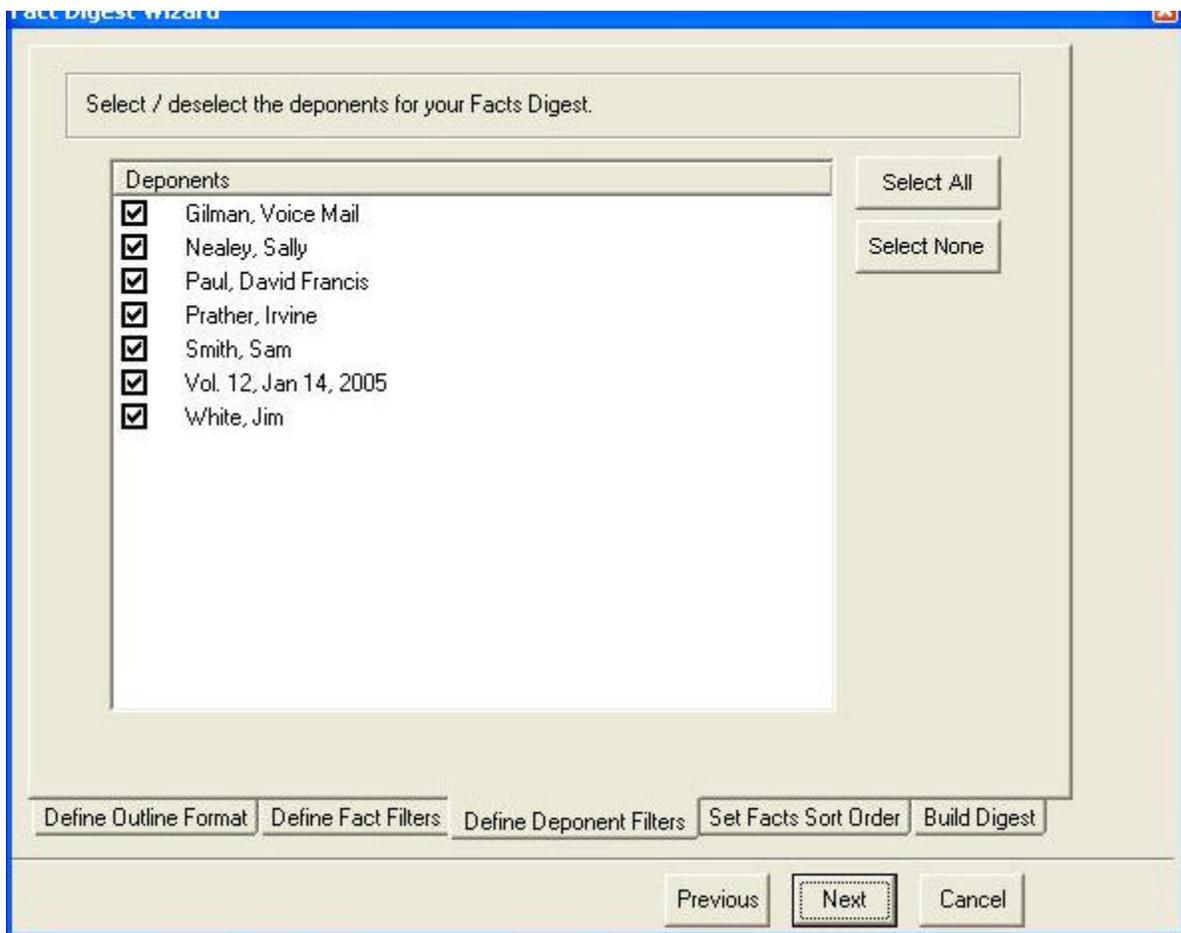
5. Select the sort order and what information you want added to the start of digest facts.

Select the fact sort order and fact fields to include with Fact descriptions.

Fact Sort Order:
[None]

Prepend Field:
Date

| Define Outline Format | Define Fact Filters | Define Deponent Filters | Set Facts Sort Order | Build Digest |

Previous   Next   Cancel
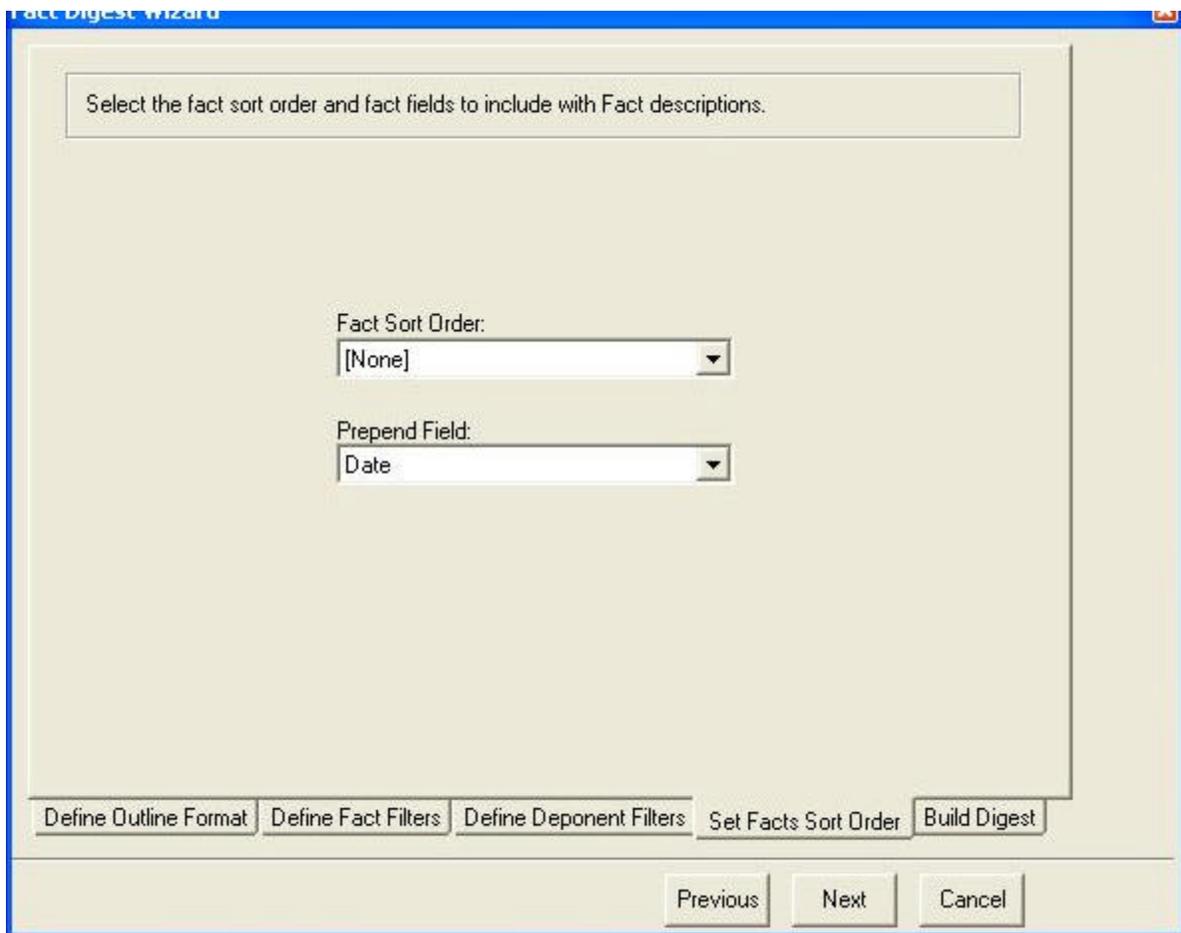
6. Select what IssueBuilder the Facts Digest Wizard should output to.
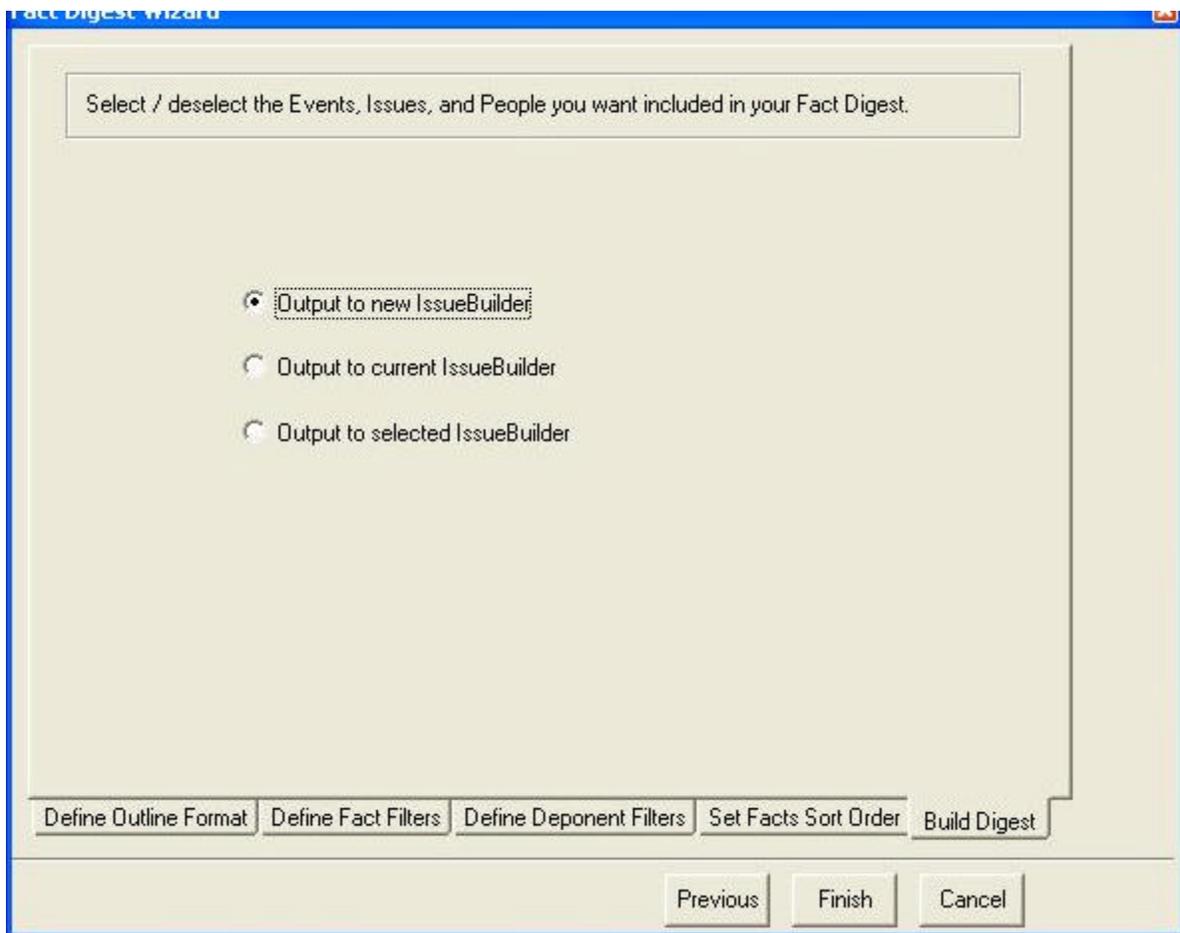
Launching External Applications

The functionality of Visionary can be augmented in almost infinite ways with the ability of IssueBuilders to launch external programs.

To launch another program from an IssueBuilder:

1. Open the IssueBuilder that is to launch the program

2. Select the IssueBuilder item under which the new Program Item is to be placed

3. Select the 'Item / Add / Program Execute' menu item or press the 'Program Execute icon on the IssueBuilder toolbar

4. Enter the required parameters
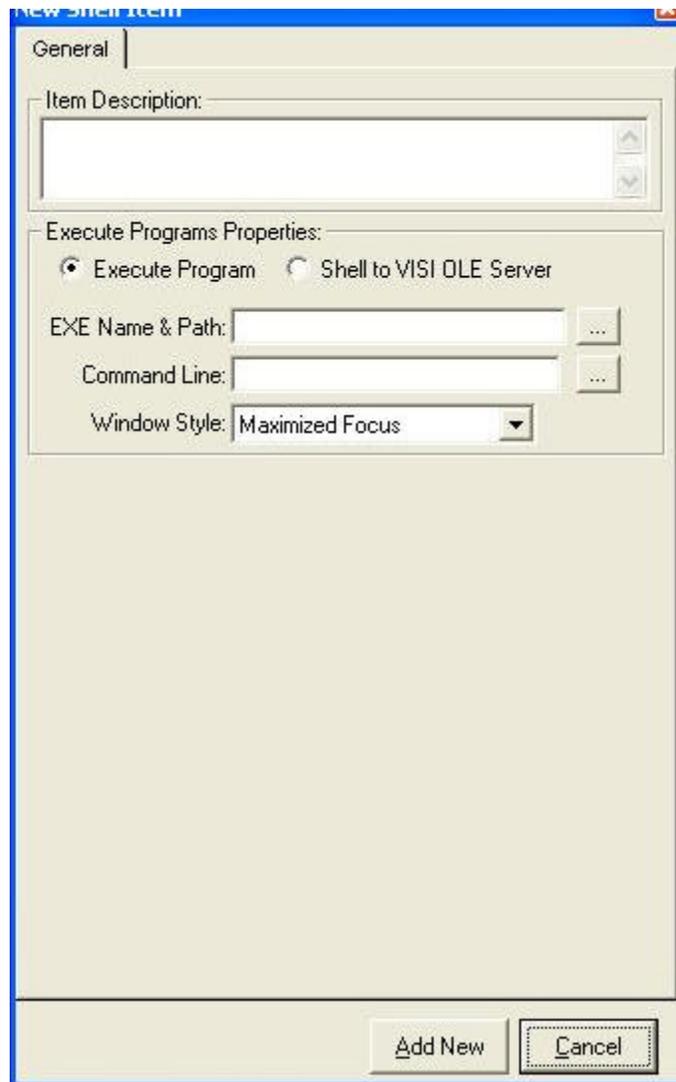
Item Description – The description that is displayed in the IssueBuilder

EXE Name & Path – The path and file name of the application that is to be launched

Command Line – Used to identify the data file that the application file should use when opened, but may contain whatever instructions are supported by the application file.

Window Style – Determines how the new application should be opened on the Windows desktop.

- *Note: If you are entering a data file name for the command line parameter and the data file name file extension is registered (i.e. '.doc' and '.ppt' files are typically registered with MS Word and PowerPoint respectively), then the EXE Name & Path are optional. In fact, it is best to not enter an application name when using common data file types because this will ensure that Visionary determines the location of the application files on an as needed basis on each computer that runs the IssueBuilder.*

5. Press 'Ok'

- *Note: When operating in dual screen mode, there can be issues with applications not launching on the proper screen. However, PowerPoint does have a setting that will cause it to launch on the proper screen.*

Importing IssueBuilders

<u>To import an IssueBuilder:</u>

1. Select the 'File/Import/IssueBuilder' menu item on the main window
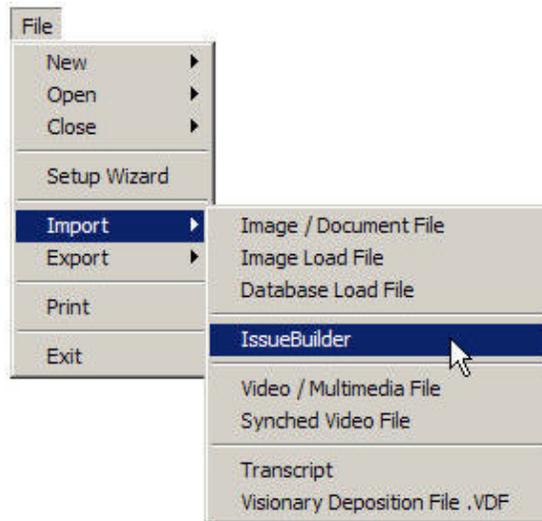
2. Browse to the specific IssueBuilder file and file type.
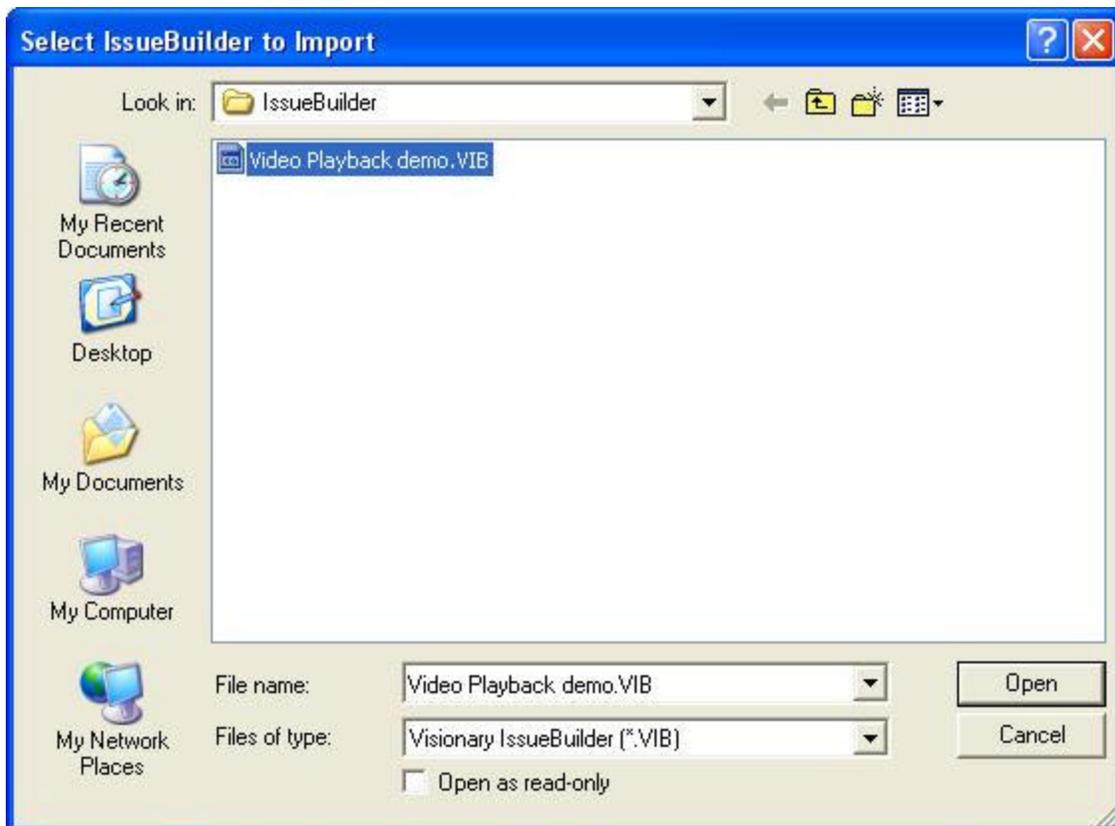
3. Click the 'Open' button

4. Upon completion, the "IssueBuilder Imported" window will open. Click the 'Ok' button to close this window.

Exporting IssueBuilders

To Export an IssueBuilder:

1. Select the 'File/Export/IssueBuilder' menu item on the main window

2. Select the IssueBuilder to be exported from the list on the "Select an IssueBuilder to Export" window. Click the "Export" button.

3. Browse to save the file and click 'Save".

VIB Format
The .VIB IssueBuilder export format contains all of the information to transfer an IssueBuilder. This format is the preferred format to use when transferring IssueBuilder data from one computer to another or when backing up data.

Simple Text Format
Simple Text Format exports the IssueBuilder to an ASCII text file and includes IssueBuilder headings and may also include excerpts from transcripts. This export format is useful when you want to export transcript clips into a format that can easily be opened by MS Word or Word Perfect.

Formatted Text Format
The main reason that Visionary exports the to the Formatted Text format is that it imports this format. If desired, users can create outlines in MS Word or WordPerfect that conform to this format for import into Visionary. If you need to dissect IssueBuilder data for some purpose, consider using the CSV

format described below. In most cases it is better to use the VIB format when you need to transfer IssueBuilders between cases or computers.

Comma Separated Value (CSV) Format
The CSV Format is a comma separated value format that is useful when you need to import IssueBuilder data into other litigation support programs or to be viewed and reorganized in spreadsheet programs like MS Excel. This format extracts IssueBuilder descriptions as well as information about the underlying data the IssueBuilder items refer. The first record (or line) in the CSV file identifies the database fields that are exported.

5. Click the 'Save Button'

6. Upon completion the "IssueBuilder Export window will be displayed. Click the 'Ok" button to close.

   ● *Note: VIB files contain pointers to data and not the actual data. Accordingly, if you export an IssueBuilder that points to 10 images and 5 video files and then import this IssueBuilder on another computer, it will only work properly if this second computer contains copies of the same data files.*