Visionary
LEGAL TECHNOLOGIES ™

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GETTING STARTED:

SETUP & CONFIGURATION

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Network

Visionary's databases can be shared by multiple users when placed on network file servers. Visionary tracks what users are logged into its databases and manages user-locking issues to ensure that users don't write over each other's data. 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.

- The Logon Window gives users the option of selected what drive they wish to log in to. It's usually best to ensure that users have all of their cases on a single drive so that they don't' become confused and mistakenly think that their data has 'disappeared'. If your users have installed the demonstration version of Visionary, they may have created valid local data sources. Consider of removing these local databases and only have your data on the network.

- Visionary's image location database stores a drive name instead of a drive letter to locate image files. In the case of local drives, Visionary uses the drive volume name to locate drives and 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's 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 databases. 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):

    - 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')

- Establish policies regarding where data is stored. When users store some data locally and some on the network, it can be achieving all case data can be challenging and other users on the network may find that they can't load some data.

- Streaming video files over a network is now fairly common. However, be aware that streaming MPEG-2 files can take 2-8 times 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-4.

- Users must log into Visionary through a mapped drive. UNC's cannot be used.

Single user in a non-networked environment

1. Perform a Visionary install on the workstation. Select to install a Full Installation including, at a minimum, Visionary 7 and the Sample Case.

2. During the install when prompted, Choose to set the Data Drive to the designated, mapped network drive letter or a locally connected drive. This will create the necessary file structure on the specified drive and copy a small sample case to it.

3. Select the drive letter corresponding to the created network share or the locally connected drive for Visionary when logging in to the program from the workstation.

Case Set-Up

The Case Setup Wizard can be accessed from the 'Create' button in the Case Selection window. The Wizard consists of a series of automated steps that guide you through the case creation process. While creating a new case with the Wizard, you will be given the option to create a case from scratch or create it from a .VBK file.
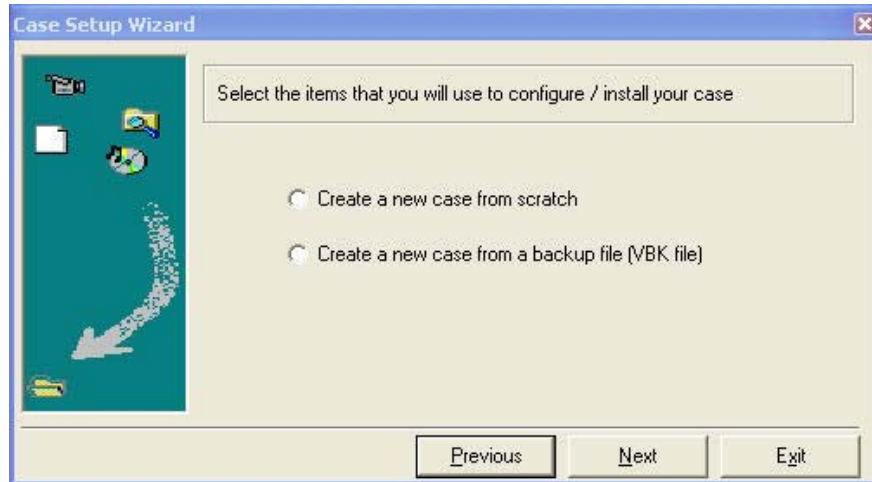
Creating a case from a VBK file

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.
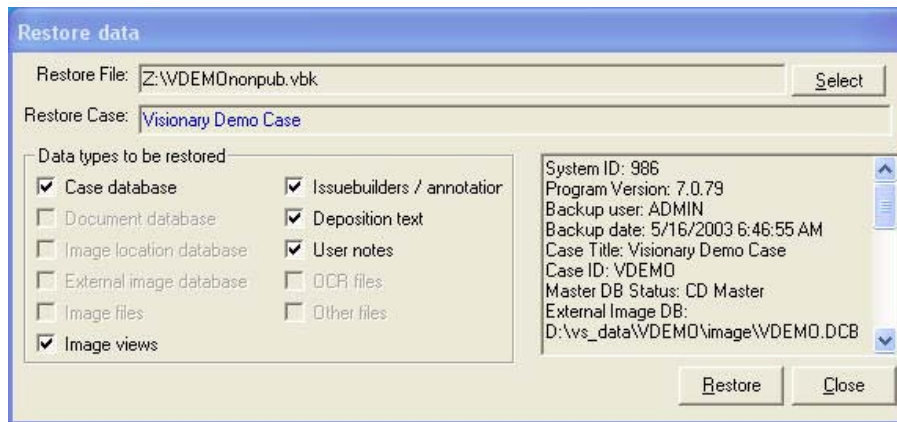
- Use the Select button to browse to and select the correct backup file.

- 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 'Open' 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 files. If the .VBK file does not contain all of these files, you will not be able to create a case using a .VBK file.

- 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 set the Visionary program to look to an 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 case from scratch

To create a new case from scratch, select the "Create a new case from scratch" option on the first window of the Case Setup Wizard. Click 'Next'.
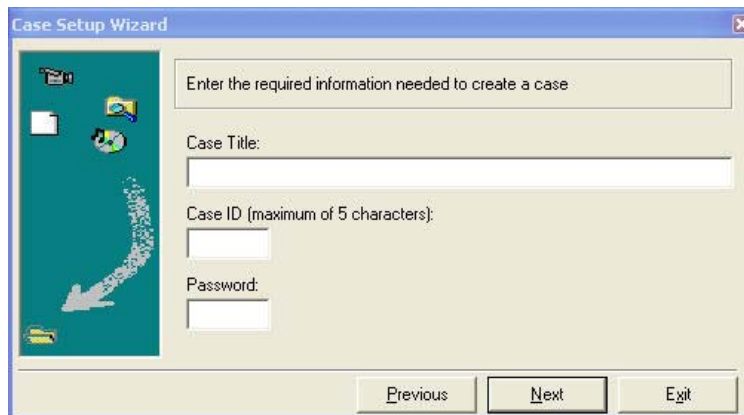
Enter a Case Title, Case ID, and Password (if desired). A Case ID is any 5 characters, and must be unique for your list of cases. Usually this is an easily recognizable abbreviation of the case name. A password is not required but is useful for security purposes. Press the 'Next' button when finished. (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 select image or video file locations into the new case.
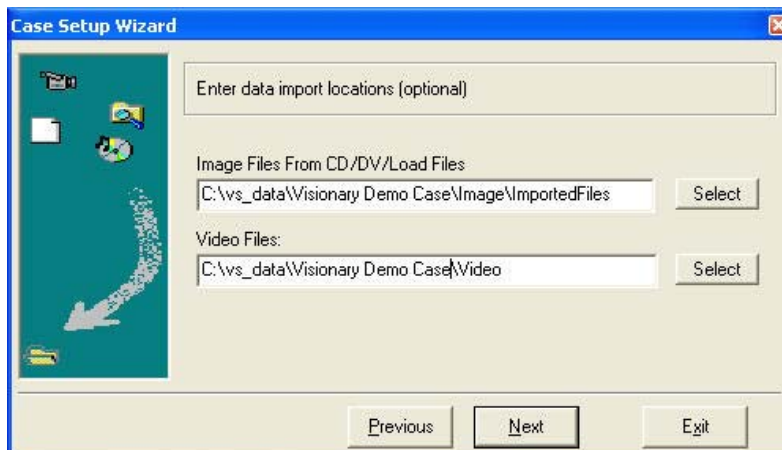
The next screen allows you to select items to be used in the initial case creation.
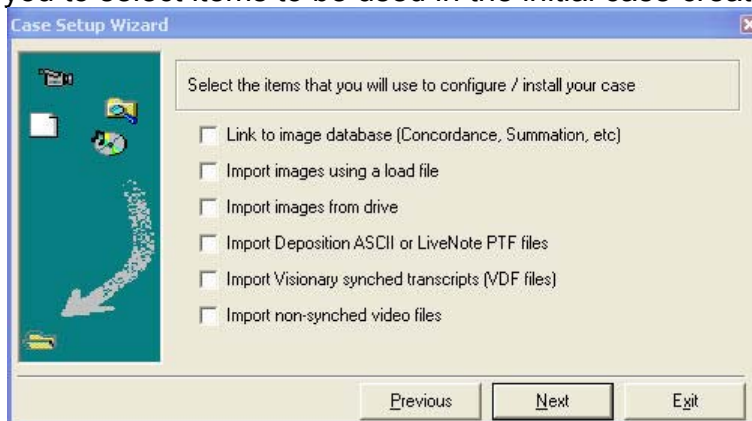
Depending upon the circumstances, it may be appropriate to select some, none or all of these options. Each option is explained below.

Link to Image Database
This option helps you set up a link to an external image database program, such as Concordance ™ or Summation ™.

Import Images Using a Load File
Images can be imported into the case using an Opticon, Summation (.dii) or other load file.

Import Images from Drive
Selecting this option brings up the Image Import screen where individual images can be brought into the case from a hard drive.

Import Deposition ASCII or LiveNote PTF File
This option allows you to import standard ASCII depositions or LiveNote files into your case.

Import Visionary synced transcripts (VDF Files)
Importing a .VDF file brings imports a synced transcript into the case.

Import non-synced video files
Non-synced video files, or non-deposition video files can be imported into the case with this option. When data importing has finished, the new case may be opened or the program will return to the Select Case window.

Case Structure

When you create a new case in Visionary, there is a case structure that is created for that case. Below is a list of folders Visionary creates with each new case. The folders can be found on the Visionary drive/Case I.D., or where you installed the software. This is where the case data is kept. (i.e. images, video files, transcripts, etc…)
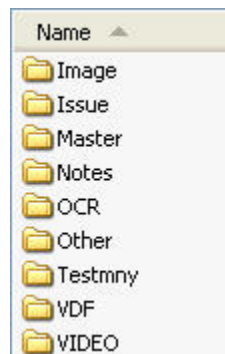
Importing Transcripts

How to import a transcript:

1. Select the "File/Import/Transcript' menu item on the main window.
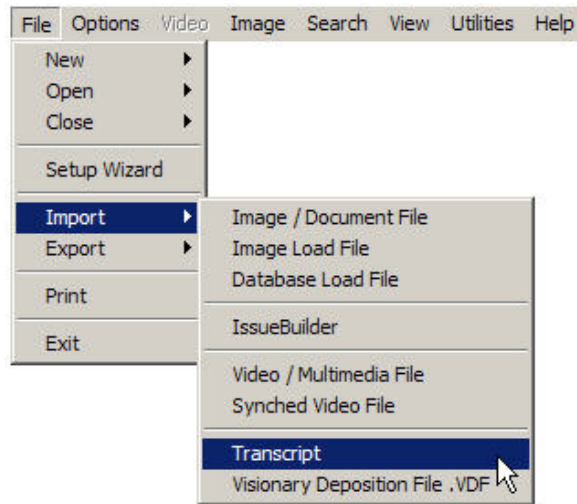
2. Select the transcript file to be imported

3. Click the Next button

4. 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.
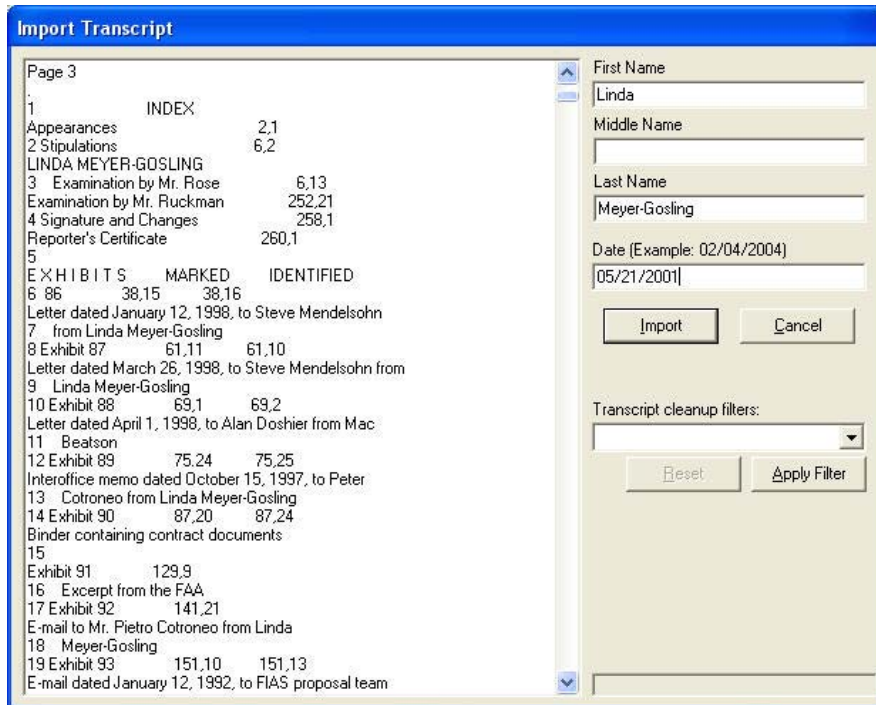
5. Click the import button to complete the import process

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

🔴 *Tip: After importing a transcript (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.*

Supported File Types:

Visionary 7 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.

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

Video

Visionary 7 was built from the ground up to support a robust set of video playback features. Visionary 7 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.

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 fro the Case Explorer

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

Playing Non-Syncronized 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.

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\case01\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 7 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.

🔴 *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.*

Syncronizing Video To Transcripts

Visionary 7 does not currently provide the ability to synchronize transcripts to video. However, Visionary does offer this functionality in its voice recognition based product Visionary Sync. Contact Visionary for further details.

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. Using the browse window, select the media file to be imported

3. Enter a description for the media file in the Import Video / Multimedia file dialog box
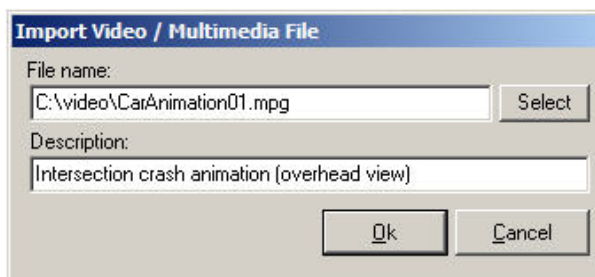
4. Click 'Ok'

🔴 *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.*

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/Synched Video File' menu item on the main window

2. Select the file to import

3. Click the 'Open' button

🔴 *Note: Files are copied to the 'Video Cache' drive location set in the Program Configurations window.*
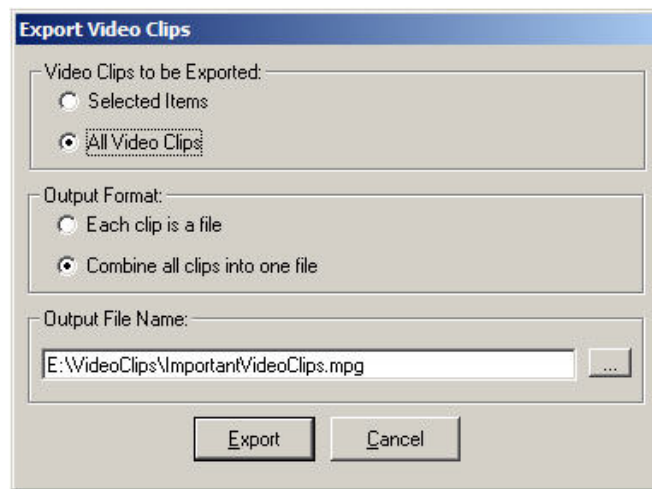
Exporting Video Clips

🔴 *The export clip feature provides the ability to export portions of synchronized MPEG video files into smaller files that only contain the video specified 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. Video Clips to be Exported Option – Select the option to export the currently selected clips or all of the video clips

6. Output Format – 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 ellipse button, define 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: This feature only exports MPEG files. In addition, 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.*

Drive Configurations

To open the Configurations Dialog select the 'Options/Configurations' menu item on the Main Window.
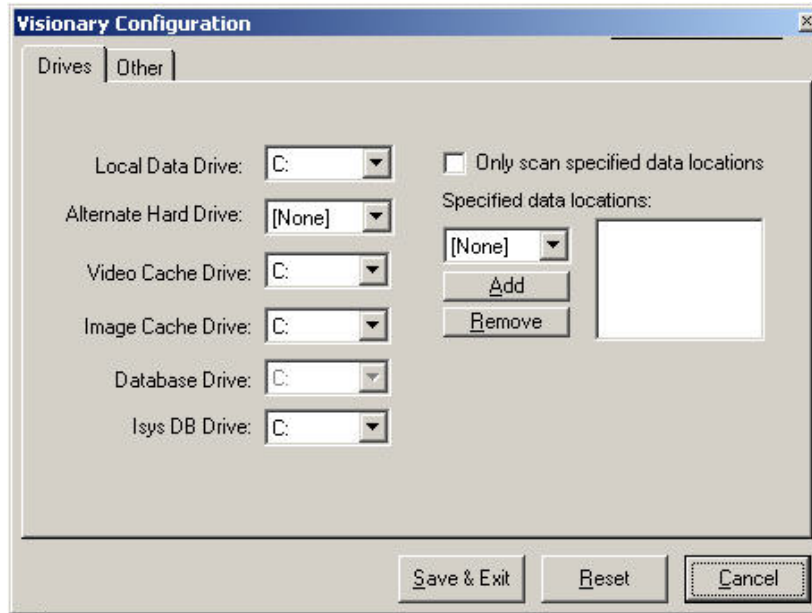
Data Drive

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].

Video Cache Drive

The Video Cache Drive setting identifies the drive location that any cached video clips will be saved to. Note: this setting is only relevant for Version 6.0 cases that have been upgraded to Visionary 7. Visionary 7 replaced the cache feature with the Exporting Video Clips feature.

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.

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.

<u>Specified data locations</u>

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
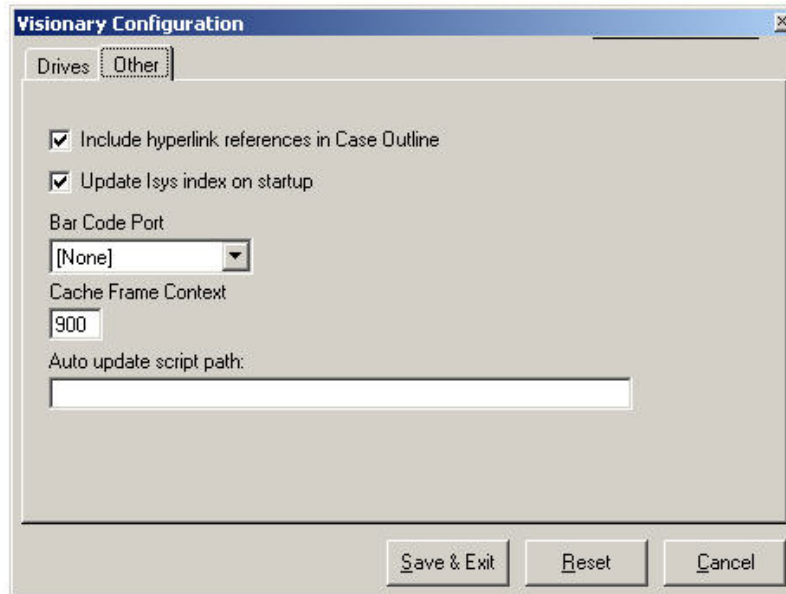
<u>Include hyperlink references in Case Outline</u>

When this option is selected, hyper linked references (see Hyper linking 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.

What is OCR?

OCR stands for Optical Character Recognition and is a process of extracting text from images. It is used to make image files fully text-searchable.

Using OCR Files In Visionary

Visionary provides users 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.

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 is 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 is 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. When an OCR file is displayed, Visionary uses the OCR file name, which should be the same as the Document ID for the record that it relates to, to determine 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.

## 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 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 the 'File/Import/Image/Document File' menu item from the main window

2. In the Document Importer window, select the files to be imported
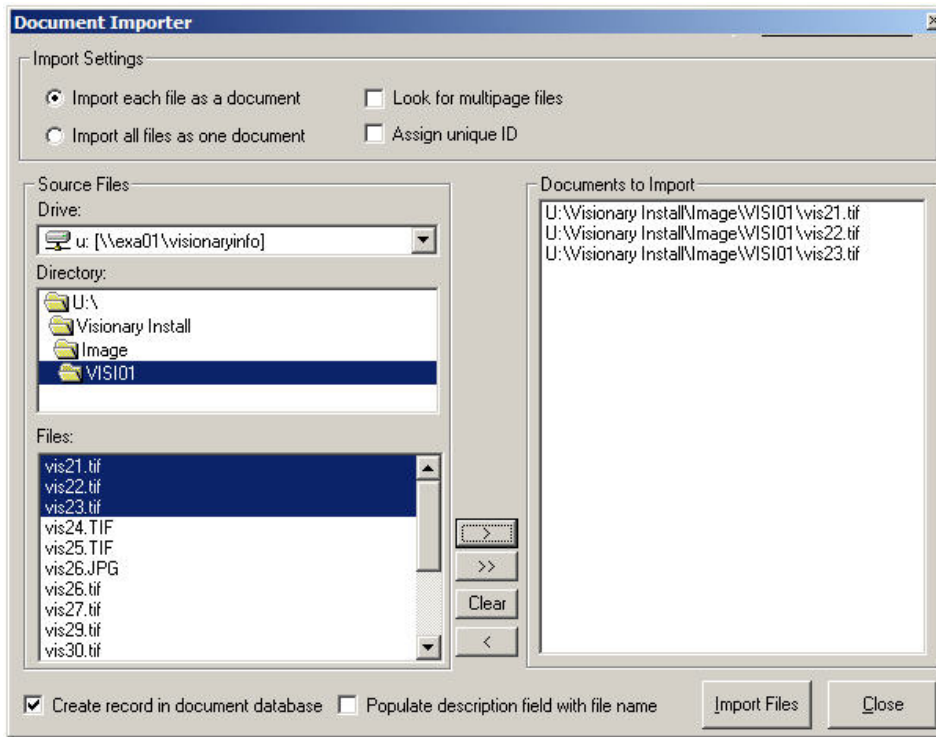
Select the file(s) and press the '>' to move the files into the 'Documents to Import' list

3. Set the import options as required

- **Import each file as a document** – choose this option if each of the files should be treated as a unique document

- **Import all files as one document** – choose this option if a collection of files should be treated as one document

- **Look for multi-page files** – use this option when importing multi-page tiff files to ensure that a record is added for each page of the document

- **Assign unique ID** – use this option if you want Visionary to assign a globally unique id to the ImageID field for the file(s) as they are imported. If this option is not checked, the first 20 characters of the file name will be used as the value for the Image ID field.

- **Create record in document database** – use this option if you want a record to be created in the Document Database in addition to the Document Page Database. This option should generally be turned on unless you are using a third party database such as Concordance™

- **Populate description field with field name** – use this option if you want to populate the description field in the Document Database with the file name.

4. Click the 'Import Files' button

5. Upon completion, a window will appear letting you know that the document/s have been imported into Visionary. 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 7 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

6. Upon completion, a Load File Import Successful window will be displayed, click 'Ok" 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
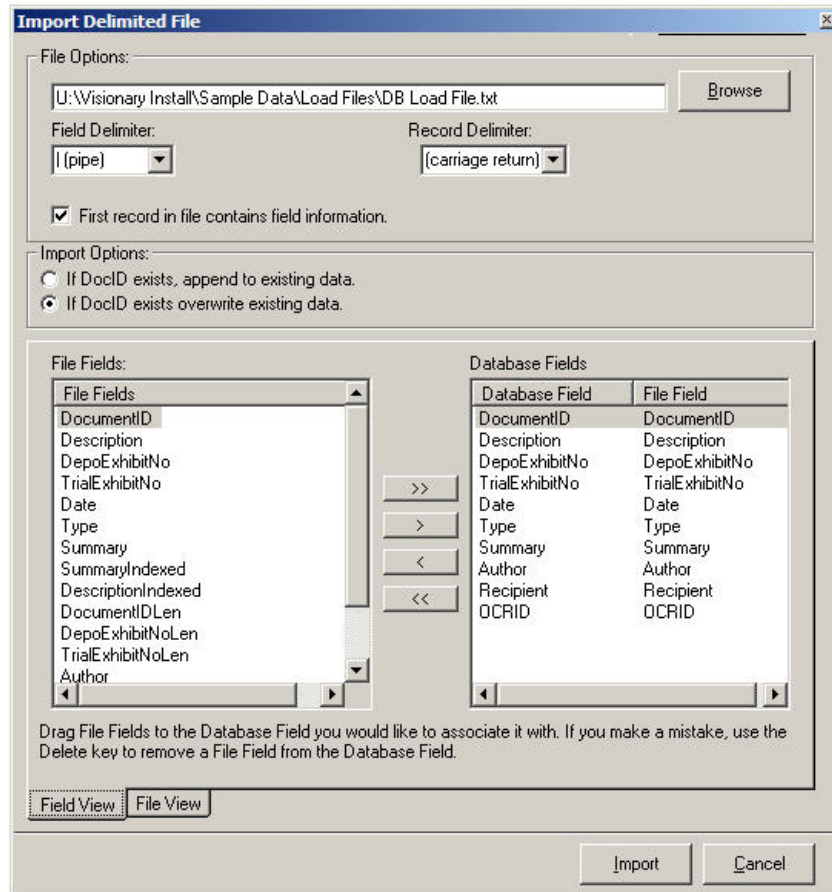
Field Delimiter – Identifies the ASCII character used to delimit fields

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 BateNo 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 window will be displayed, click 'Ok"

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.

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.
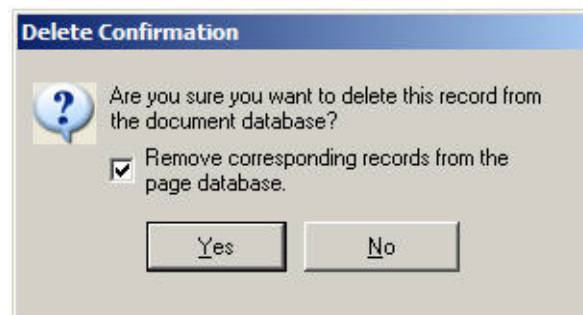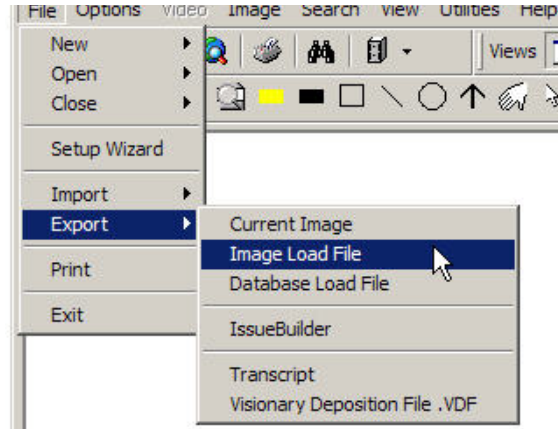

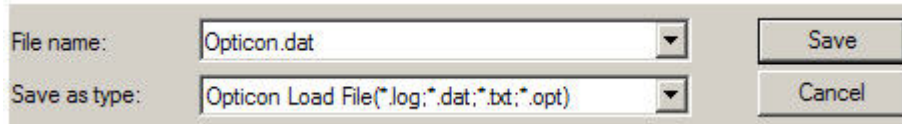5. Press the 'Yes' button

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

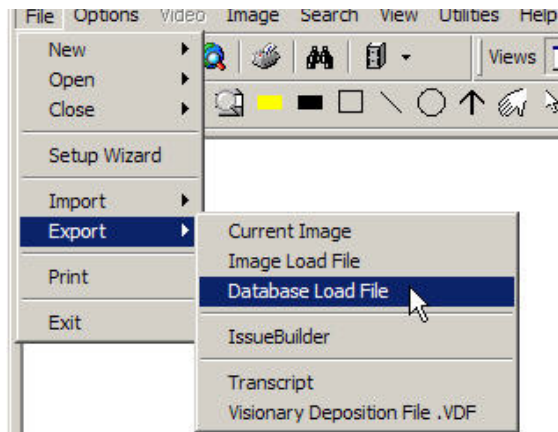3. Select the type of exported load file to be created from the 'Save as type' drop down list
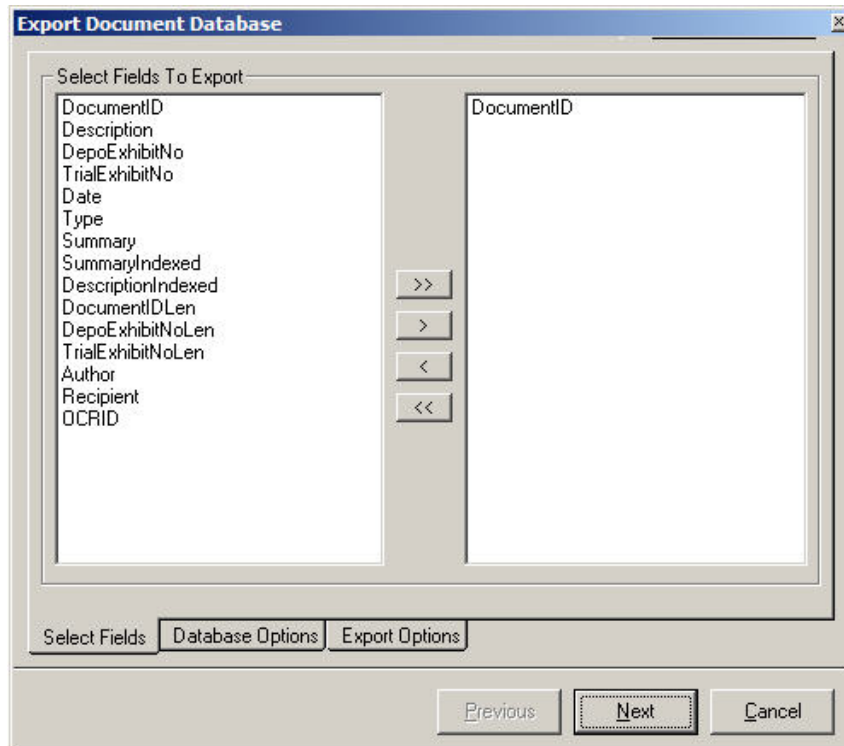

4. Click 'Save'

Exporting Database Load Files

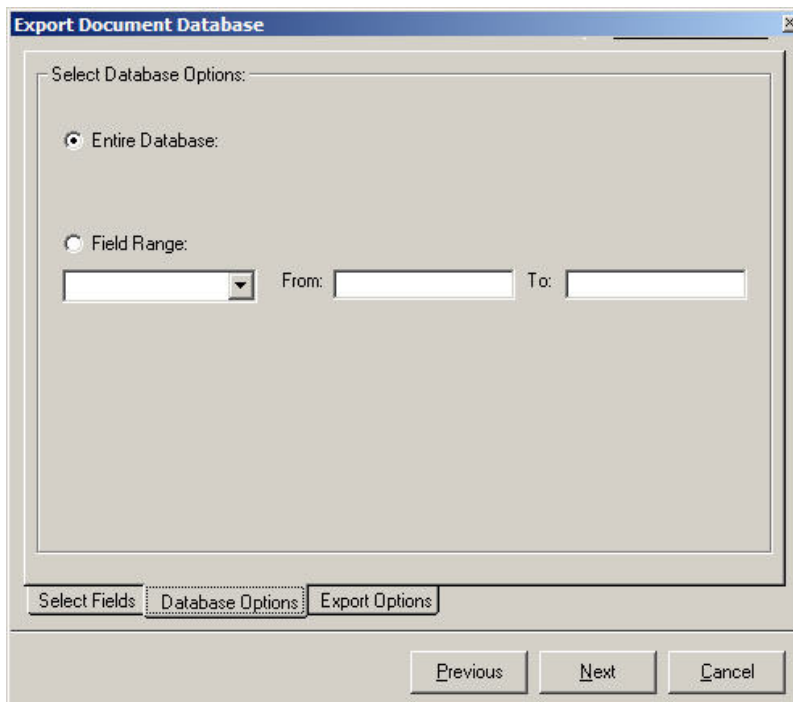To export or create a Database Load File from a Visionary database:

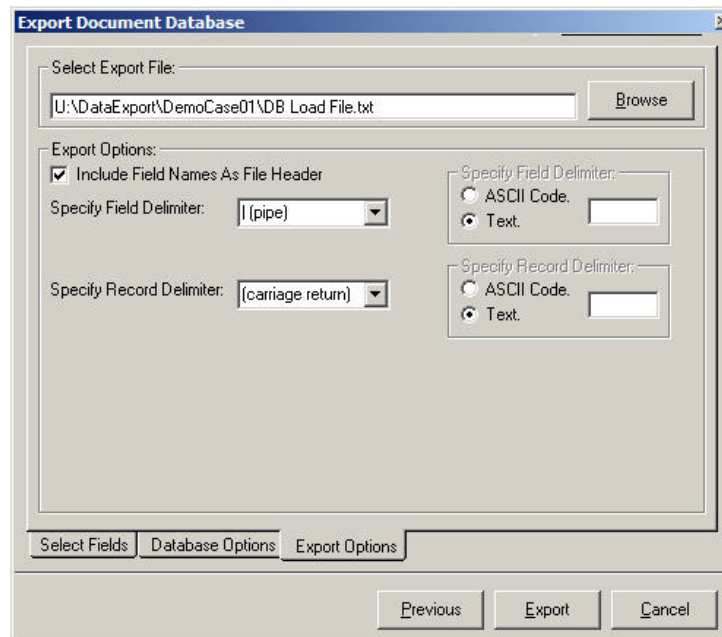1. Select the 'File/Export/Database Load File' menu item from the main screen

2. Select the individual fields to be exported and the 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 Document ID in all Database Load Files.*

Image Volume Redirector

Overview

The Image Volume enables all the image files associated to 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 in loaded in your CD-ROM drive.   Next, you copy all of the images into a folder named 'c:\ my cases\jones vs smith\images\cd001' and remove the CD.   The images will no longer display.   To remedy the problem, you add an entry to the Image Volume Redirctor.   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:\ my cases\jones vs smith\images\cd001' to the beginning of whatever path is referenced in the database.
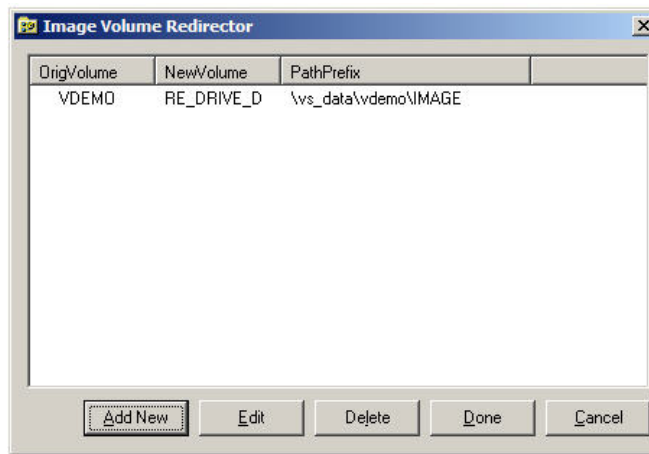
Adding Redirection Entries

To add entries to the Image Volume Redirector:

1. Select the 'Utilities\Image Volume Redirector' menu item on the main window
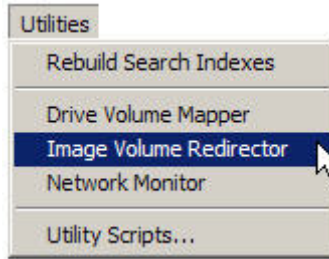
2. Press the 'Add' button on the Image Volume Redirector dialog

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 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

4. 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

<u>To delete an Image Volume Redirector entry:</u>

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

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.
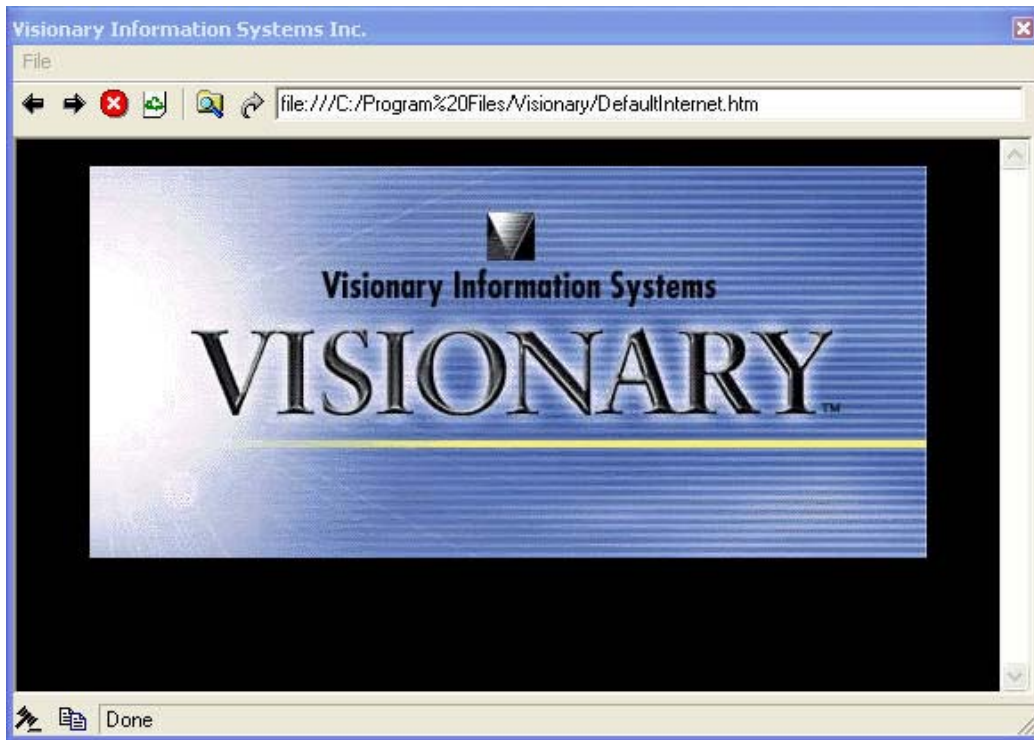
⬅ Move backward in browse sequence

➡ Move forward in browse sequence

❌ Stop loading page

🔃 Refresh page

🔍 Browse for file

↪ Load current file or web address

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. Load the added to the Document Page database

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 cause 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.*

Third Party Software Integration

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 to create 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.
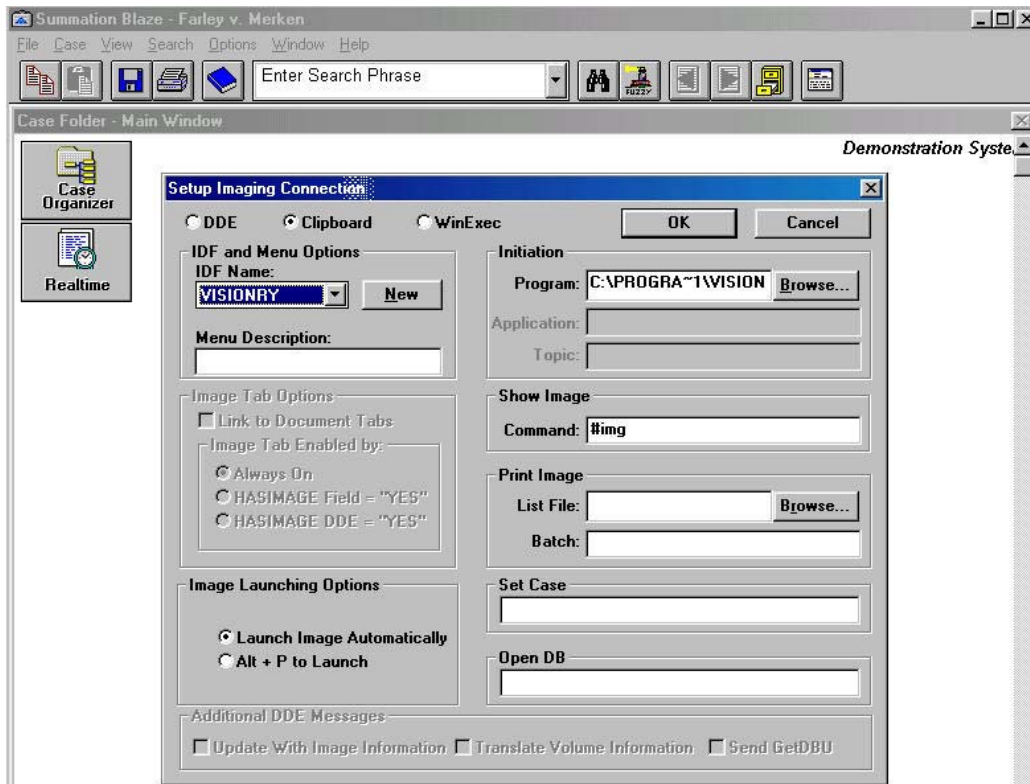
Summation iBlaze

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. Make sure the Database Program (EXE): box lists the location of the .exe file of the Summation software. You may also choose to set the Connect to an existing database option. This causes the selected database to load when launching Summation from within Visionary.

3. Launch Summation from the Summation button added to the Visionary main toolbar. If you have designated a database file to open when configuring Visionary, Summation will launch with the specified database loaded.

5. From within Summation you can send the entire database to the currently open IssueBuilder or perform searches and set the result sets to the currently open IssueBuilder by right clicking on the Field Headers in Summation. From this menu you can also print each document.

6.
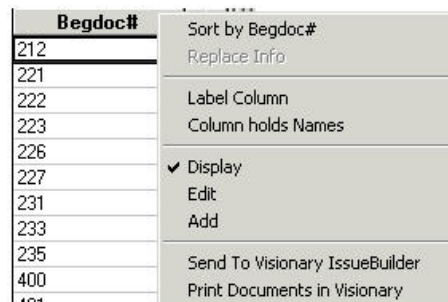
PowerPoint

Launching PowerPoint From IssueBuilders

Visionary allows you to incorporate PowerPoint slides and presentations into your case. From the IssueBuilder you wish to have your slide or presentation contained in, 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.
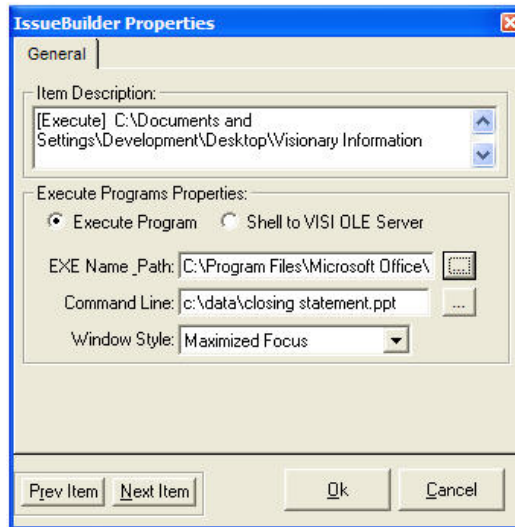
Set the EXE Name_Path should be set to the location of the PowerPoint executable. In this example the path to the PowerPoint executable is C:\Program Files\Microsoft Office\Office\PowerPnt.exe. For the Command Line parameter, set it to the location of the PowerPoint .pps file. In this example the Command Line is set to F:\Sample Data\Visionary Information Systems.pps. Notice the –s prepended 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 other 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
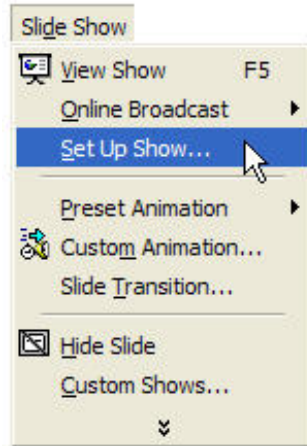
Step 2. Set the 'Show on' setting to your second monitor
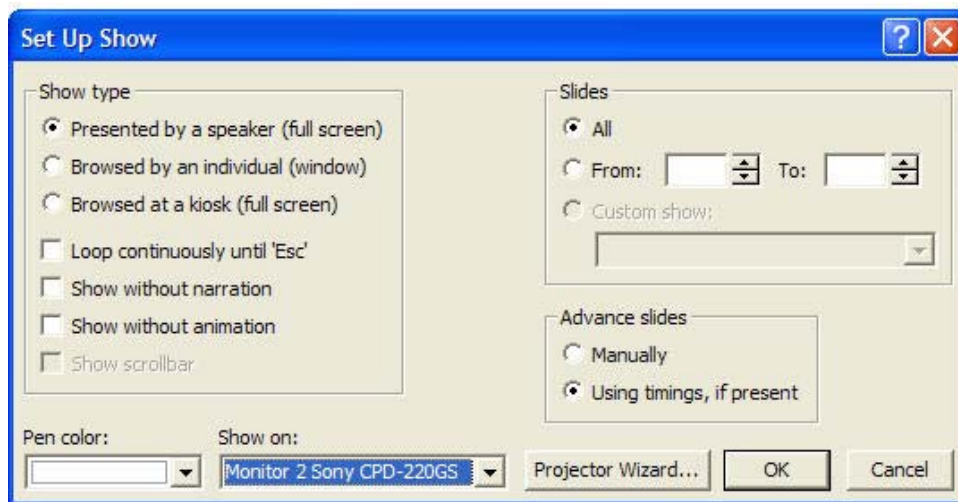
- It is also possible to use PowerPoint in a dual screen configuration by importing your PowerPoint flies into the Document Database and having Visionary display your PowerPoint presentations inside of Internet Explorer. See index for further information.

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.
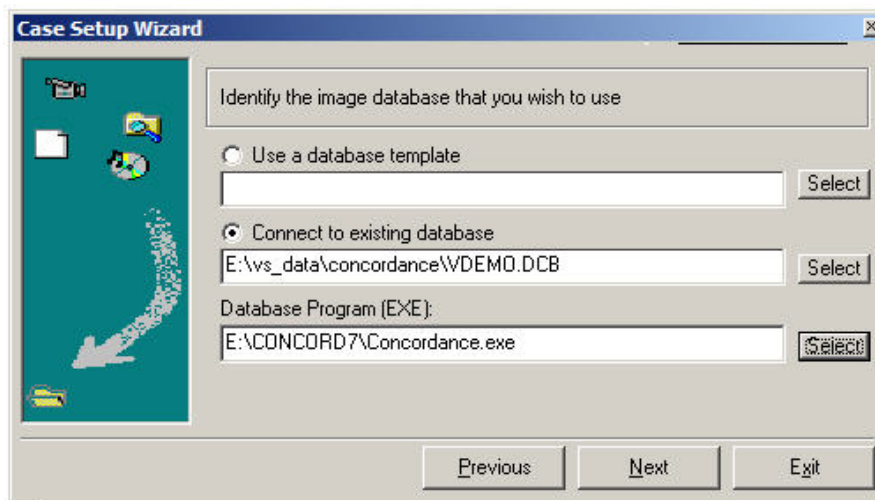
Concordance

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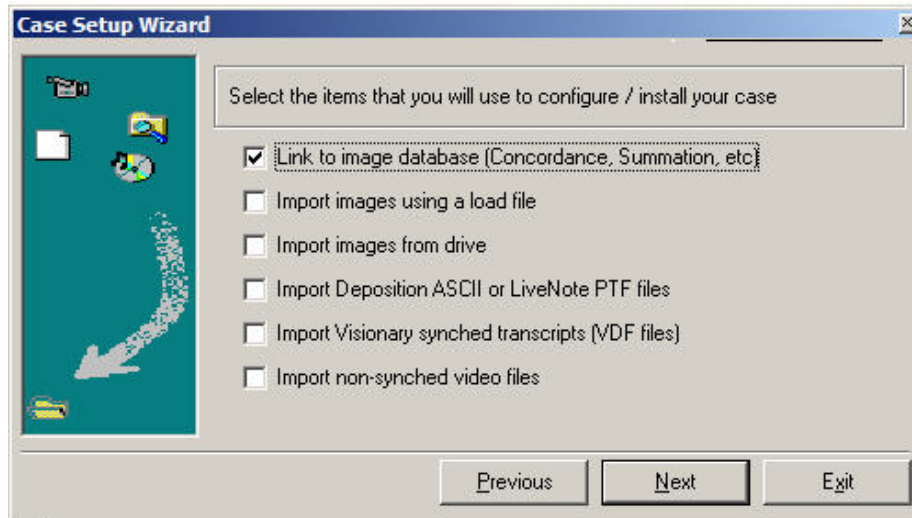
4. In the database configuration step, select the Concordance database file to be associated with the current case and then select the Concordance program executable file (concordance.exe).

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.
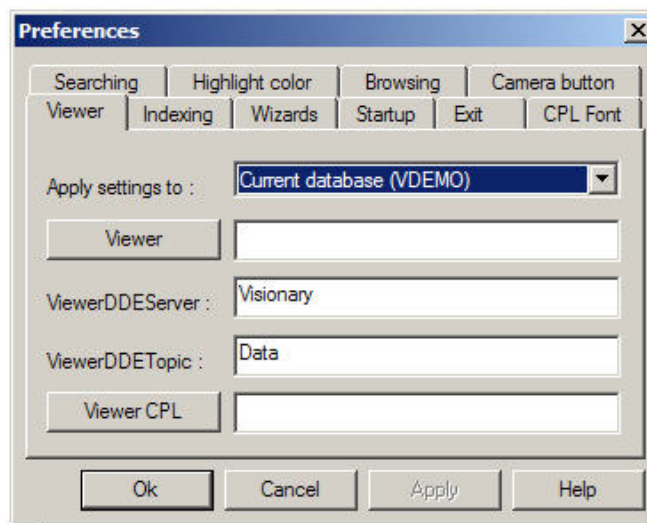
To display images selected in Concordance inside of Visionary:

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.

Backing Up Cases

The Backup Data feature, which is accessible from the Startup Window, allows you to backup all or part of your case data, including linked 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 PKZIP 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 Startup Window, select the Utilities/Case Backup menu item.

2. Select the case from the drop down list box, and select the location you wish to export the data to, in the Backup File box. Enter the case Password in the Password box, if required.

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 allowing for more information to fit on each disk. If more than one disk is necessary, you will be prompted to insert the next disk. (Note: Disks will be formatted prior to backup!)

🔴 *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 have been spent working in these areas.*

Restoring Case Backup Files

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.

To Restore a Case:

1. From the Startup Window, select the Utilities/Case Restore menu item.

2. If the backup file you will select is password protected, enter the password.

3. Select the Restore File by clicking the Select button or typing the path name in the Restore File box.

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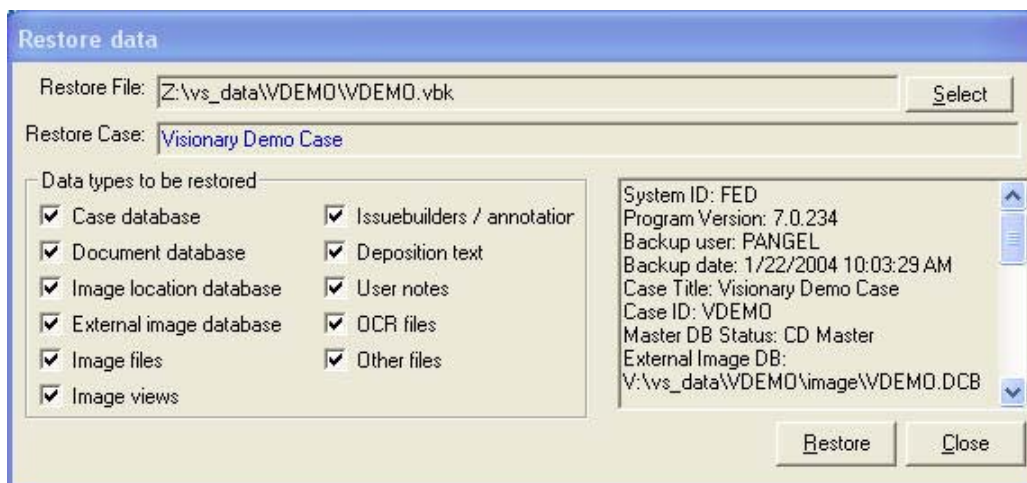
🔴 *Note- When you restore a case using a Visionary Backup file, the items that were included in the backup will be activated in the selected items to restore. All options may not be available depending on the items that were originally included in the backup.*

🔴 *VBK files used to create cases must include: Case database, Image Document DB, Deposition text, IssueBuilders / annotations, Image Location DB, User Notes, and Original transcript files. If the backup file does not contain all of these files, you will not be able to create a case from scratch.*