



RealLegal® Binder™ 6.0 >> QUICK START GUIDE



INTERFACE AND TOOLBAR OVERVIEW

FROM BINDER, GO TO HELP | CONTENTS AND REFER TO "TOOLBARS"



> RealLegal Binder organizes discovery, annotations, reports, etc. within interactive panes. The **Project Tree** pane offers immediate access to all portions of the project. The **Details Pane** contains an at-a-glance view of the selected item. The open transcript, document or report is shown in the **Display Pane**. The **Word Index** and **Issue Code** panes can be activated from **Window** drop-down menu.

> Go to the **Project Tree** in the upper left portion of the interface. Click on the + next to the **Transcripts** folder. Click on any transcript to review in the Display Pane.

> Click the **New** button from the main toolbar. Select **Search Group**. When it appears in the Project Tree, name it.

> Select a transcript from the **Transcripts** folder and drag and drop it to the new **Search Group**. Do the same with another transcript. Now you can limit searches to just those added to this group.



ADD TRANSCRIPT

FROM BINDER, GO TO HELP | CONTENTS AND REFER TO "ADDING TRANSCRIPTS"



> Select **File - New - New Transcript** from the menu bar.

> Click the **Browse** button to find the file.

> Select the file and click the **Open** button.

> Click the **Next** button and RealLegal Binder will import the file.

> Click the **Finish** button.

> Click the **Close** button.



ADD DOCUMENT

FROM BINDER, GO TO HELP | CONTENTS AND REFER TO "ADDING DOCUMENTS"



> Select **File - New - New Document** from the menu bar.

> Click **Add** to browse to the file (any standard image format). Click **Open**. Click **Add** again to select additional files for importing.

> Click **Next** to import the files.

> Enter the descriptive information about the document and Click **Next**. If OCR (the ability to search for text in scanned memos and photographs) is not highlighted, contact your sales representative for licensing information. Click **Next**.

> Complete the fields to link the exhibit to a specific page and line in a transcript. Click **Finish**.



SEARCH AND LINK

FROM BINDER, GO TO HELP | CONTENTS AND REFER TO "SEARCHING AND LINKING"



Search and Link is useful when an exhibit is mentioned multiple times in multiple transcripts, and, everywhere a mention exists, you want to link the document to the relevant text. Later, when reviewing the transcript, you can click the link to view the document.

> Select **Search - Search and Link** from the menu bar.

> Type a relevant word or phrase in the **Search** field. For example, the name of a document you recently imported.

> Click the **Link Document** drop-down list to select the document that you intend to link to the search word or phrase.

> Click the **Action** drop-down list to categorize the exhibit.

> Click **Link All** to link all mentions of the word or phrase to the specified document. Click **Close**.



CREATE ISSUE CODE

FROM BINDER, GO TO HELP | CONTENTS AND REFER TO "MAINTAINING ISSUES"



- > Go to the **Project Tree** and click **All Issues**.
- > Right click anywhere in the Details Pane (the upper right pane of the split screen) and select **New Issue**.
- > Type the name of the new issue code.
- > Click the **drop-down list** to select a color for the new issue.
- > Click **OK**.



USE THE WORD INDEX

FROM BINDER, GO TO HELP | CONTENTS AND REFER TO "USING THE SEARCH FIELD"

- > Select **Window - Word Index** to display it.
- > Go to Project Tree and select **Search Groups**.
- > In the upper-right pane of the split window, verify a checkmark is next to **All Discovery**.
- > Type a word in the search field above the Word Index. In the Word Index, click on a transcript **line and page number combination**, or a document page number, to jump to that location.



ANNOTATE DISCOVERY

FROM BINDER, GO TO HELP | CONTENTS AND REFER TO "ANNOTATING TEXT"



- > With a transcript (or document) open in the Display Pane, click the **Cursor Mode** drop-down menu and select **Annotation Mode**.
- > Move the cursor over the transcript text and swipe it (click and hold down left mouse button, drag cursor over text, release mouse button). The **New Annotation** dialog box opens.
- > Select the applicable issue code, type comment, and disable or modify chronology. Click **OK**.
- > The Annotation Icon appears in the left margin of the transcript. Move cursor over the icon, and, when it becomes the hand symbol, click it to review the annotation.

Follow the same procedure to annotate a document in the project.



CREATE AN ANNOTATION REPORT

FROM BINDER, GO TO HELP | CONTENTS AND REFER TO "CREATING ANNOTATION REPORTS"



- > Select **File - New - New Report** from the menu bar.
- > In the pop-up dialog box, select **Annotation Report, Exploded View, and Customize**. Click **Next**.
- > Select a Search Group, for example, **All Discovery**. Click **Next**.
- > Select the Issues and Users to include in the report. Click **Next**.
- > To search for an annotation with a comment, click the **Only include annotations with comments** checkbox, click the **comment contain this text** checkbox, and type the comment. Click **Next**.
- > Name and describe the report for later use. Click **Finish**.
- > To e-mail the report, click the **Send** drop-down menu and select **Mail Recipient as HTML**.
- > The report will remain in the Project Tree for future use.



WORK IN REALTIME

CONSULT REALTIME GUIDE AT WWW.REALLEGAL.COM/BINDER.ASP



- > Work with your court reporter to establish the connection for realtime feed.
- > Click on the **New Realtime Transcript** from the **New** drop-down tool on the menu bar.
- > Follow the prompts and enter Transcript Properties.
- > Review the Realtime Guide to learn how to Quick Mark, Auto Mark, and more.

To discover how to take RealLegal Binder projects on the road and collaborate via the Internet, call 888.584.9988 ext. 4 and request RealLegal® iBinder™ details.