Opus 2 End User Guide

A quick guide to basic Opus 2 functionality

v1.0

OPUS2

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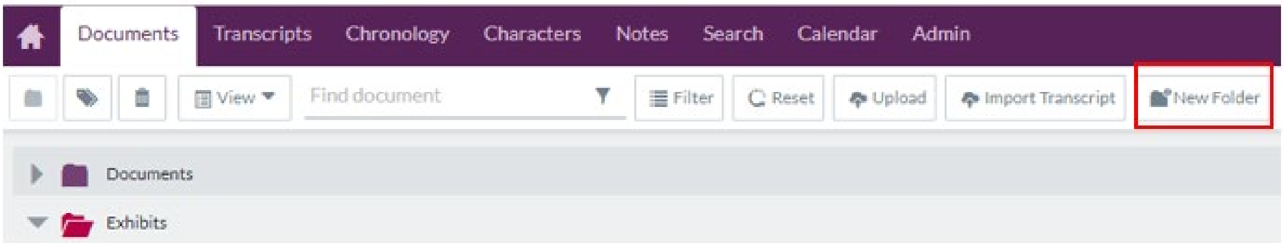
DOCUMENT AND FOLDER UPLOADS

Creating folders and uploading documents in Opus 2 is a simple, straightforward process. **Text-searchable PDFs** are the recommended format for uploaded documents, but Opus 2 can perform OCR on the documents as well if a PDF is not OCR'd at the time of upload.

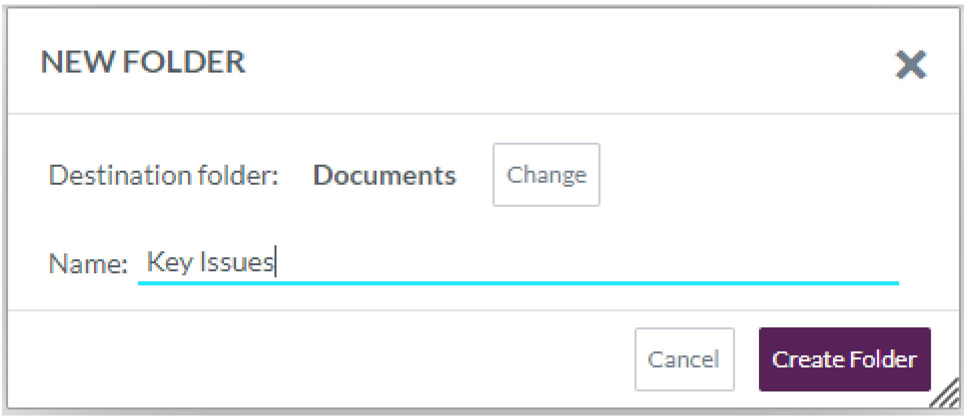
Creating New Folders & Setting Folder Color

In Opus 2, documents and transcripts are generally organized in folders in the Documents tab. These folders can be customized for any name or color desired by the user.

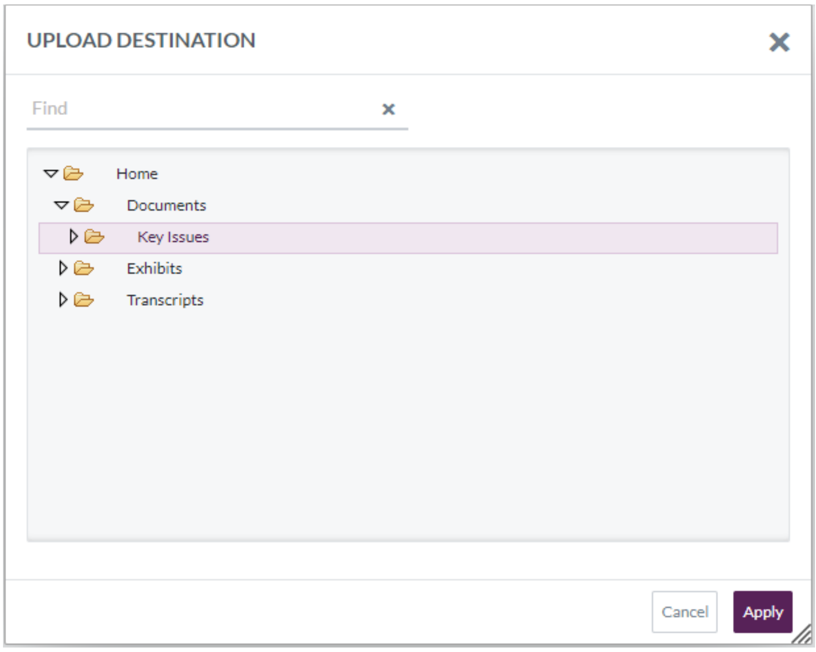
Click on the **New Folder button** in the Documents tab toolbar to create a new folder.



Click on **Change** to open the **Upload Destination** to set this. Choose the **Destination folder** within the workspace to create a top-level (Home) or nested folder (choose a parent folder to nest under).

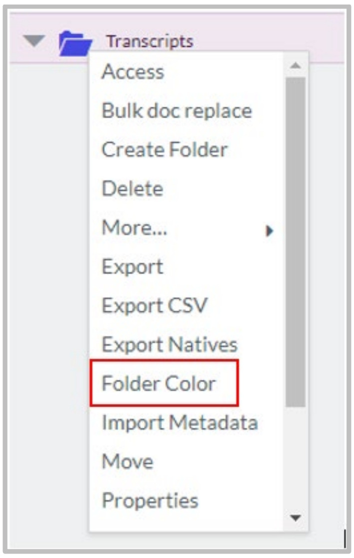


To create a nested folder within an existing folder, simply click on the desired existing (parent) folder to select it, and then hit **Apply.**

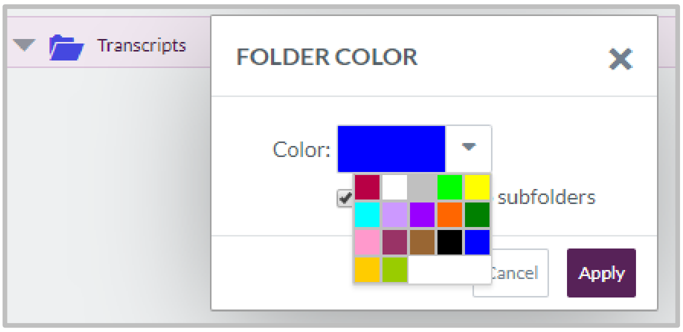


To set Folder color:

Right-click on the desired folder and select **Folder Color** from the menu.



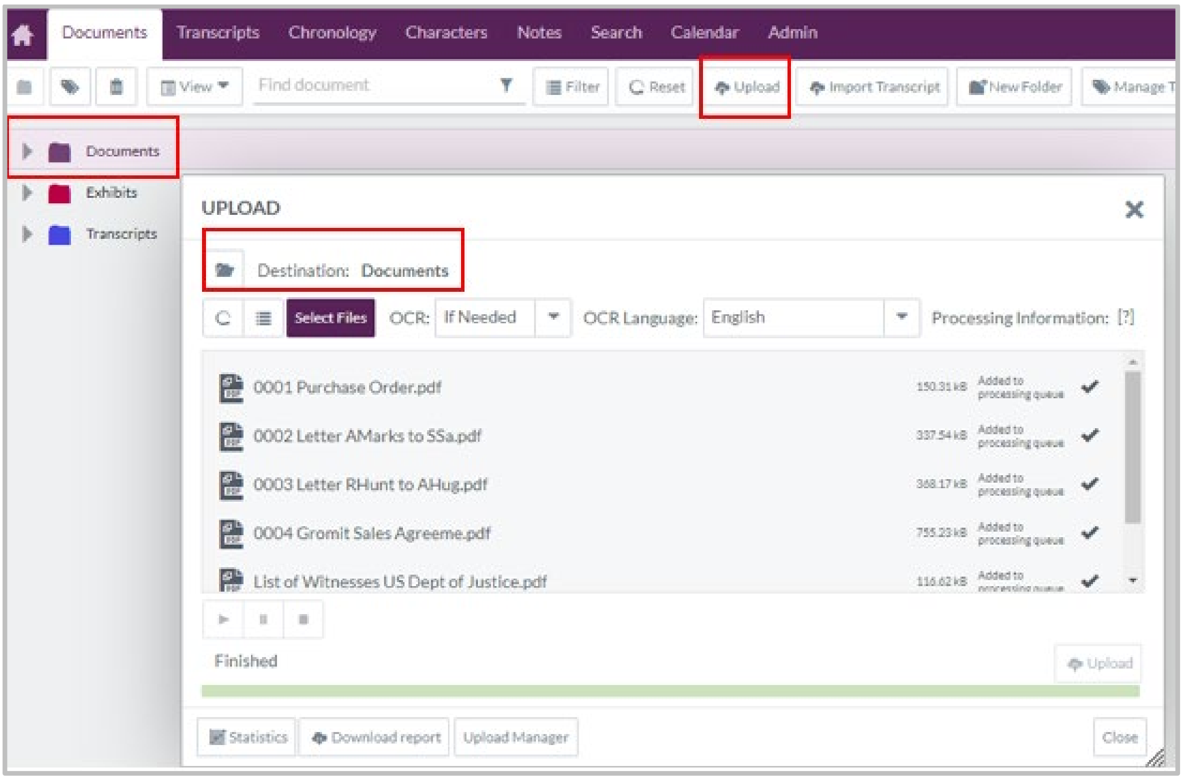
Select the desired color from the palette.



Users can also set the same color for all sub-folders within the parent folder by checking on the box next to this option.

Individual Document Uploads

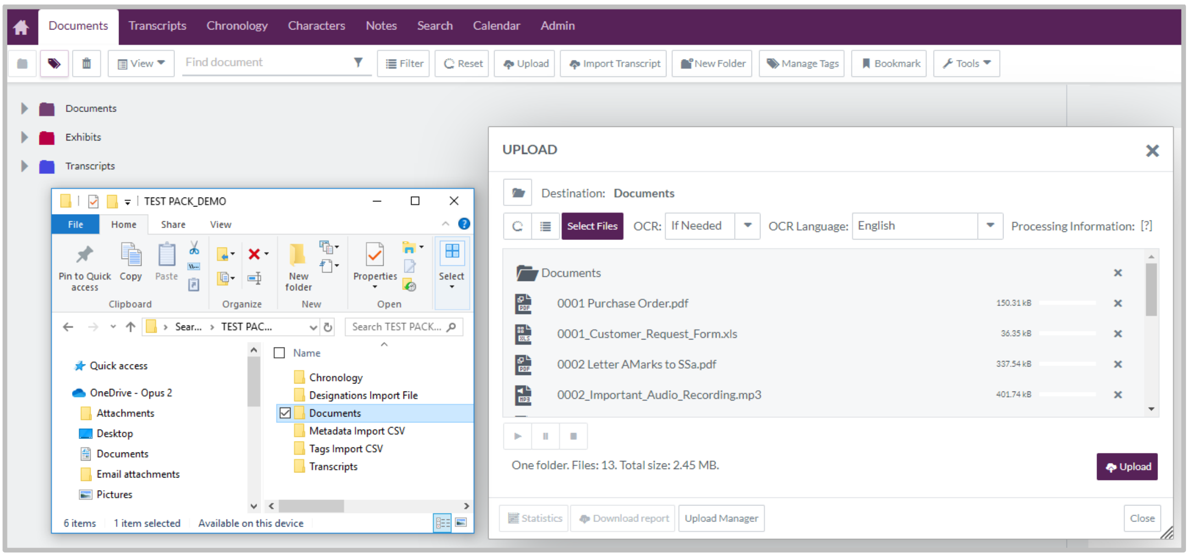
Click on the destination folder and **click the Upload** button located on the toolbar, **OR**, alternatively, **drag and drop** the files directly from the local drive directly into the **preferred folder** in the Opus 2 Documents tab, which will automatically trigger the Upload dialog.



If using the upload button: browse to find the document selected from the local drive to upload. Click on the document(s) and then click the **Upload** button in the **File Upload** window.

Folder Uploads

Users can also **drag and drop** entire folder structures directly into the Upload window. **Opus 2 will retain the folder structure, including all subfolders within a main/parent folder**.



OCR Settings

Once the desired documents appear in the Upload box, select the desired **OCR settings.** See the below options:

If Needed: Opus 2 identifies documents that need OCR:

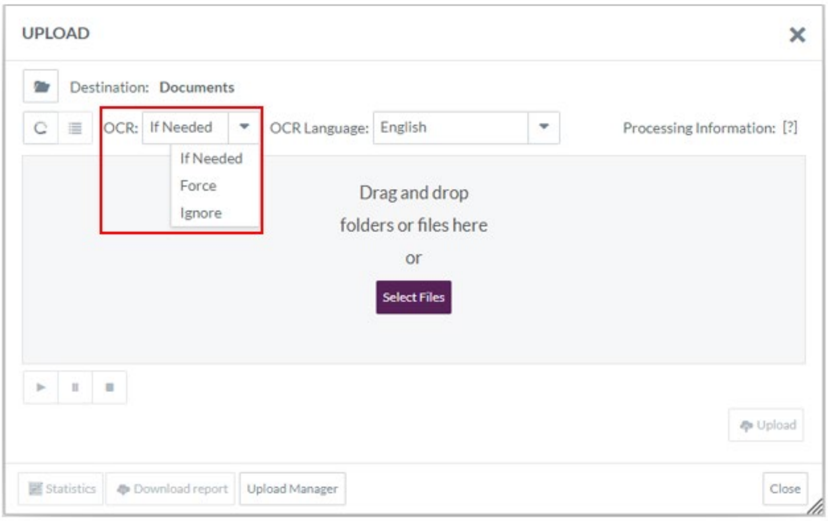
- if document contains 10 characters or less.

- Please note that if a small section of the document is **NOT OCR'd**, i.e., a signature or handwritten text, even if the rest of the document is already text searchable, Opus 2 will consider the document as needing OCR and will run OCR on it, if this option is selected.

Force: Opus 2 will OCR every document, even if over the Opus 2 threshold of characters.

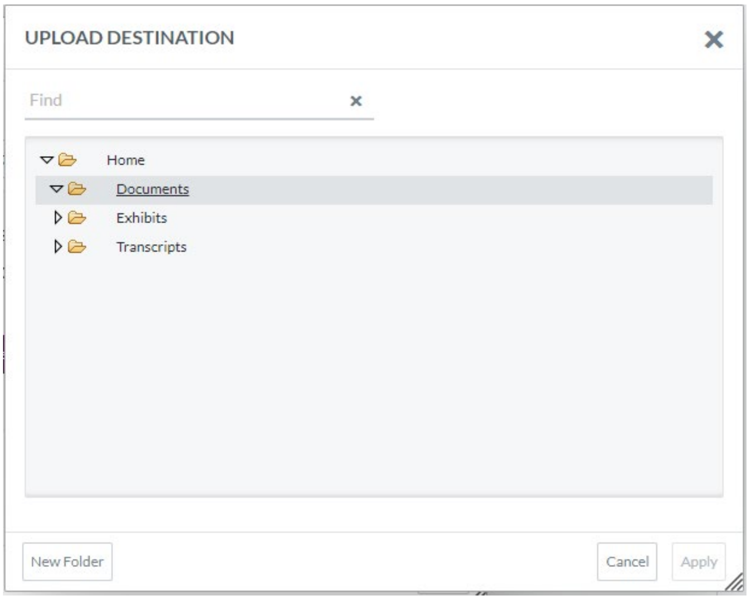
Ignore: Opus 2 will not OCR any of thedocuments.

BEST PRACTICE: We strongly recommend running OCR on PDF documents In Adobe, **prior to upload**, and then selecting the "Ignore" option In the Upload dialog during upload, to ensure the fastest possible upload speed.

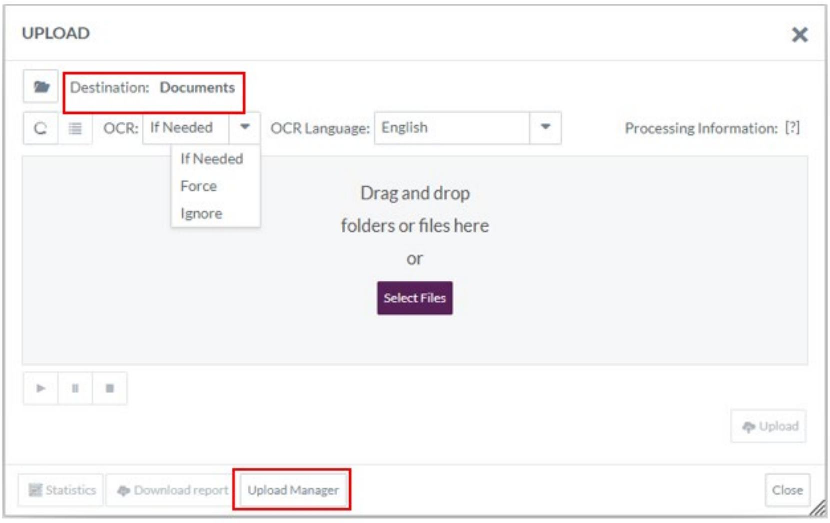


Setting the Upload Destination Folder

Click the **Destination** button to choose the destination folder of the documents. The documents will upload into the selected folder.



Click **Upload** to start loading the documents; Opus 2 will start the *processing* of the documents.



Click **Upload Manager** to view and monitor the status of the processed documents.

NOTE: If "Ignore" OCR was selected, and there are 20 or less documents in the Uploader, the upload job will bypass the Upload Manager and the documents will appear immediately in the folder.

TAGS

The process of applying Tags to either individual or multiple documents at a time is quick and simple. Tags are useful for marking documents to group them into specific categories or issues, or for further review, and are extremely helpful for sorting and organization in case collaboration and trial preparation.

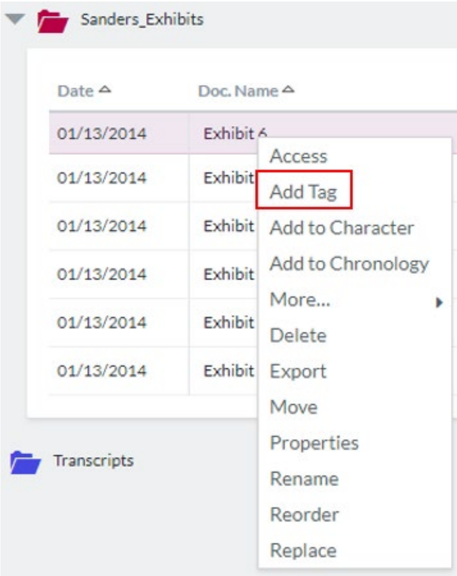
Tagging Documents

There are a number of ways to tag documents, which can be achieved by toggling back to the **Folder View** of the documents:

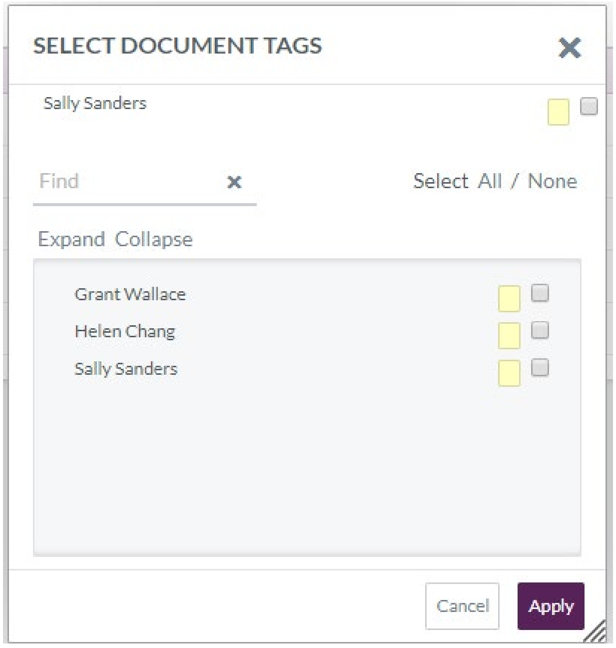
1. Tag a single document

2. Tag a selection of documents
3. Tag a folder (and subfolder contents)

Click to select a document (or multiple documents using **Shift** or **Ctrl** key) or a folder**.** Right-click and choose **Add Tag** (for single documents) OR **Tag Folder** (at the folder level) OR **Add to** and click **Tag** (for multiple document selections).

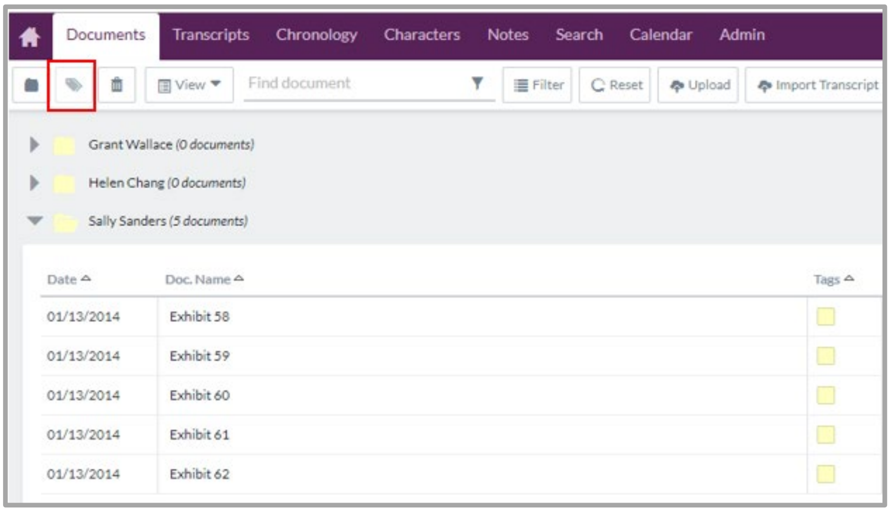


Tick the relevant tag (or multiple tags) and click **Apply**.

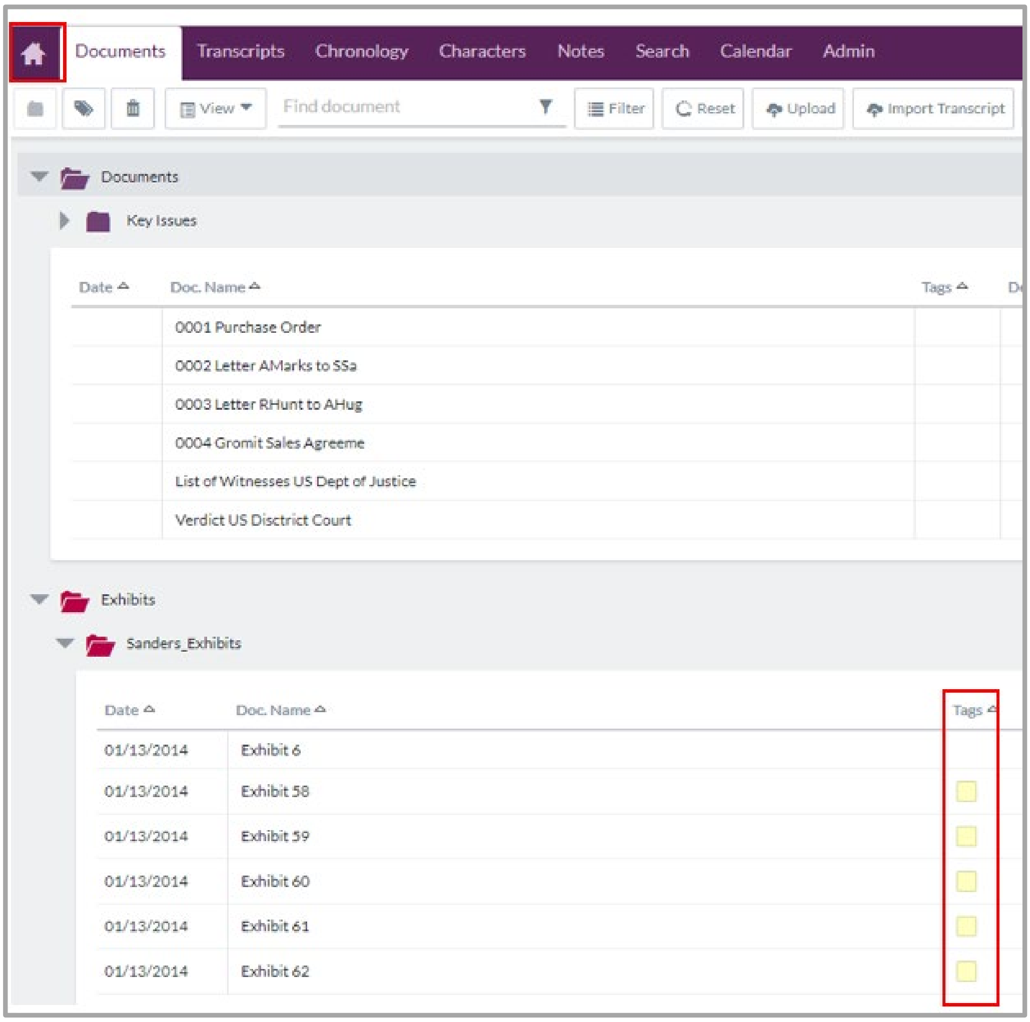


The documents will then be tagged to the selection. The User will be able to view the documents in the **Tag folder view** and **Tag columns view.**

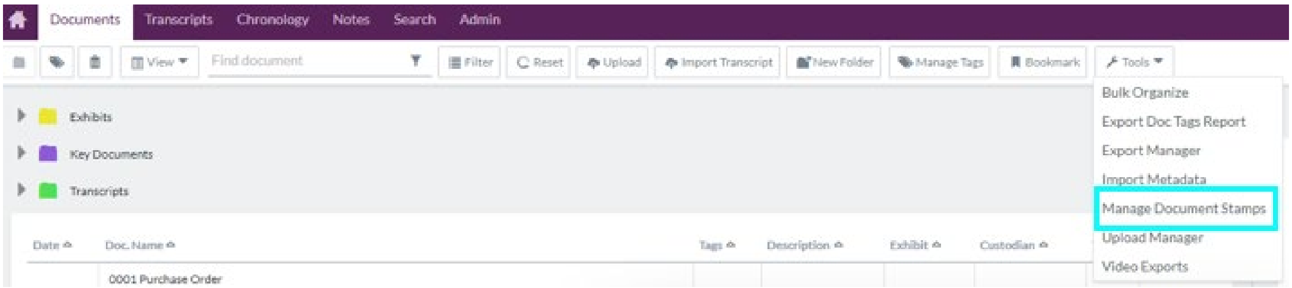
Tag Folder View (from Documents Tab)



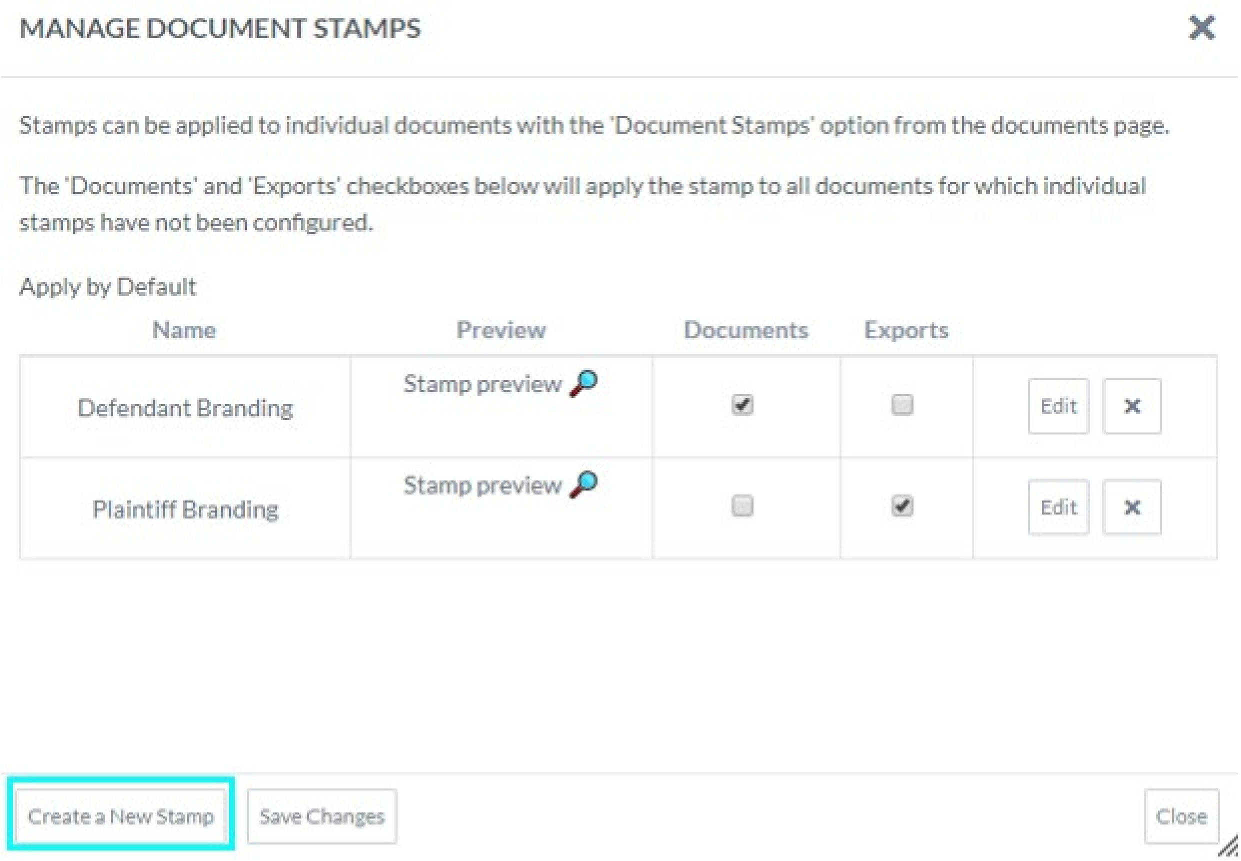
Tag Columns View (within Documents Tab > Columns)



DOCUMENT STAMPS



Users can now create and manage document stamps directly from the Documents Tab. Click on the **Tools** menu and select **Manage Document Stamps** to open the Manage Document Stamps dialogue.

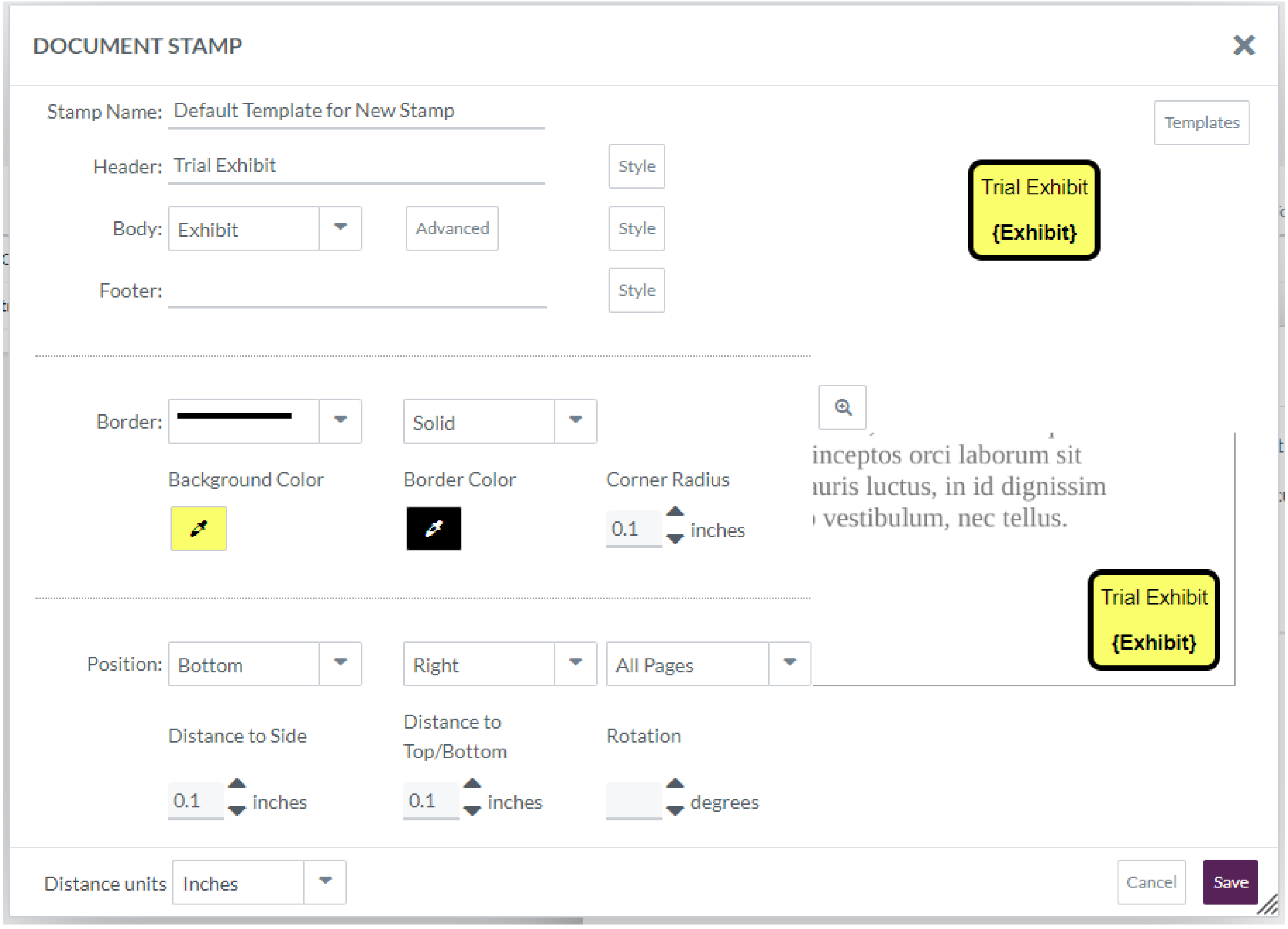


Create a new stamp:

Click on the **Create A New Stamp** button on the bottom left corner of the Manage Document Stamps dialogue to open the **Document Stamp** dialogue, and set up the following:

- **Stamp Name** – the main identifying label for the stamp within the workspace.
- **Header** – the main text that will appear on each stamp.
- **Body** – the metadata field values that will appear under the header, i.e., Beg Bates.
- **Footer** – any other preferred line of text, i.e., the case name; will appear under the Body.
- **Border width, background color** and the stamp's **position** on each document can be customized here as well.

- **Templates** can also be applied to the stamp format; click on the **Templates** button to view the options.
- **Position -** Choose the placement or position of the stamp within the document. Click on the **Zoom** icon to display the full-page view of the document and preview the placement of the stamp within the document. Stamp position can also be adjusted manually from the document view by clicking on a stamp and then dragging and dropping it into a new position. The new stamp position can be applied to all pages by ticking the dialogue box.
- **Distance Units -** Define the unit of measure to use when setting the distance of the stamp from the edge of the document page.

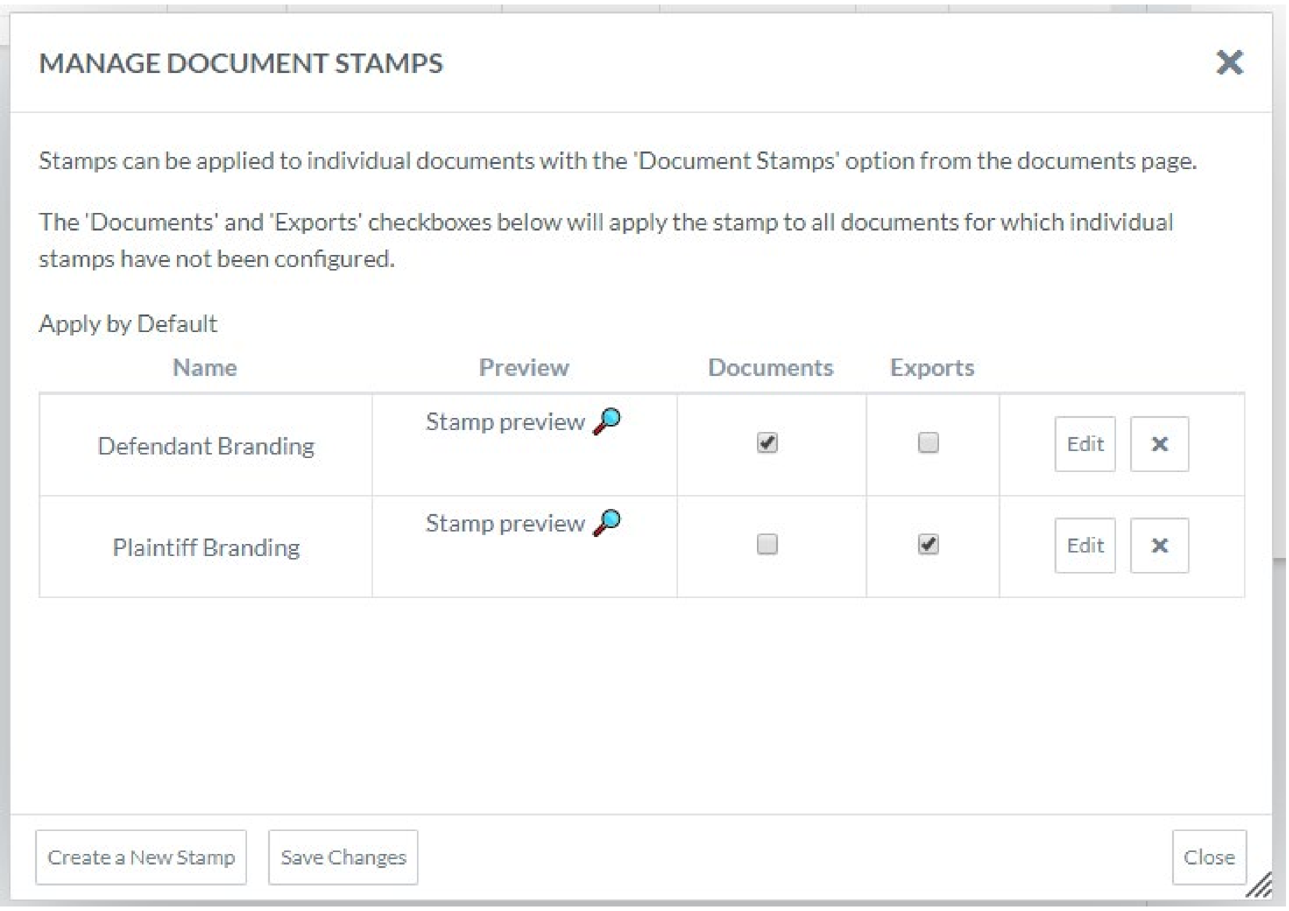


To use a pre-existing stamp template, click on **Templates** in the upper right corner of the dialogue, and choose from the displayed templates.

Click **Save** to create the new stamp or to save changes made to an existing stamp. All stamps created will be listed in the **Manage Documents Stamps** page.

Manage Document Stamps

Within the **Manage Document Stamps** dialogue, select whether the stamp should be **applied by default to ALL documents** in the workspace or in **all exports**, or both, or neither. If stamps are not applied by default, the user can always apply them to each document individually.



Check the boxes to the right of each stamp to customize settings for stamp application.

- Check under **Documents** to show the stamp on all documents by default.
- Check under **Exports** to show the stamp on all exported documents by default.
- Stamps can be unapplied at a document level.

Click on **Edit** to make changes to a stamp, or the **X** corresponding to a stamp to permanently delete the stamp.

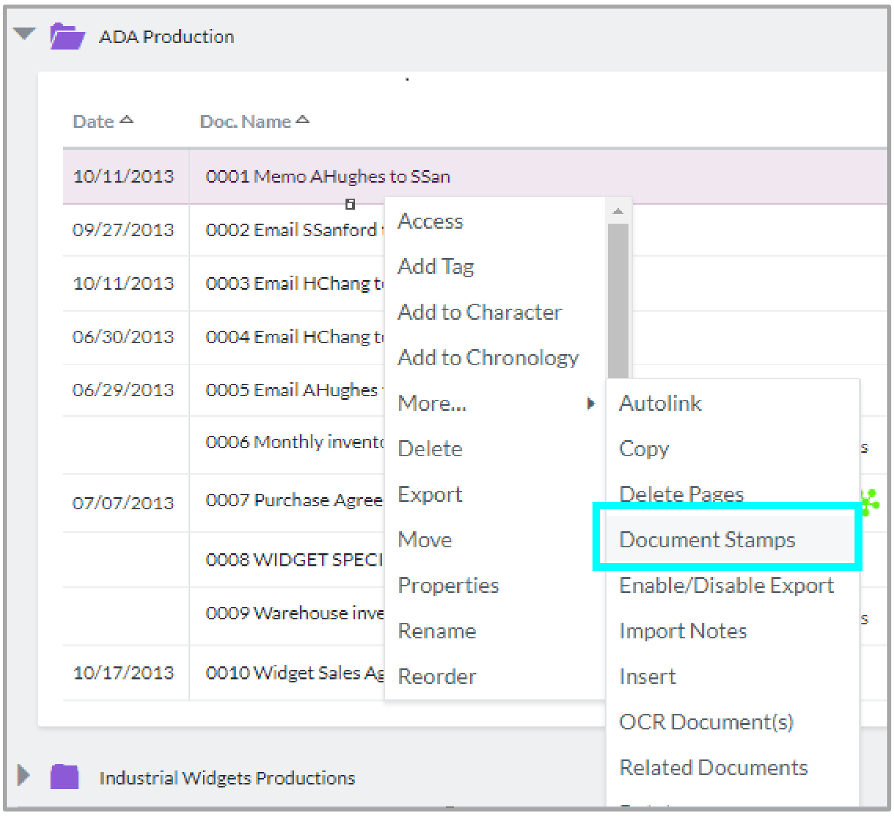
Remember to hit **Save Changes** at the bottom of the dialogue to ensure all edits are applied.

To remove a stamp from a document:

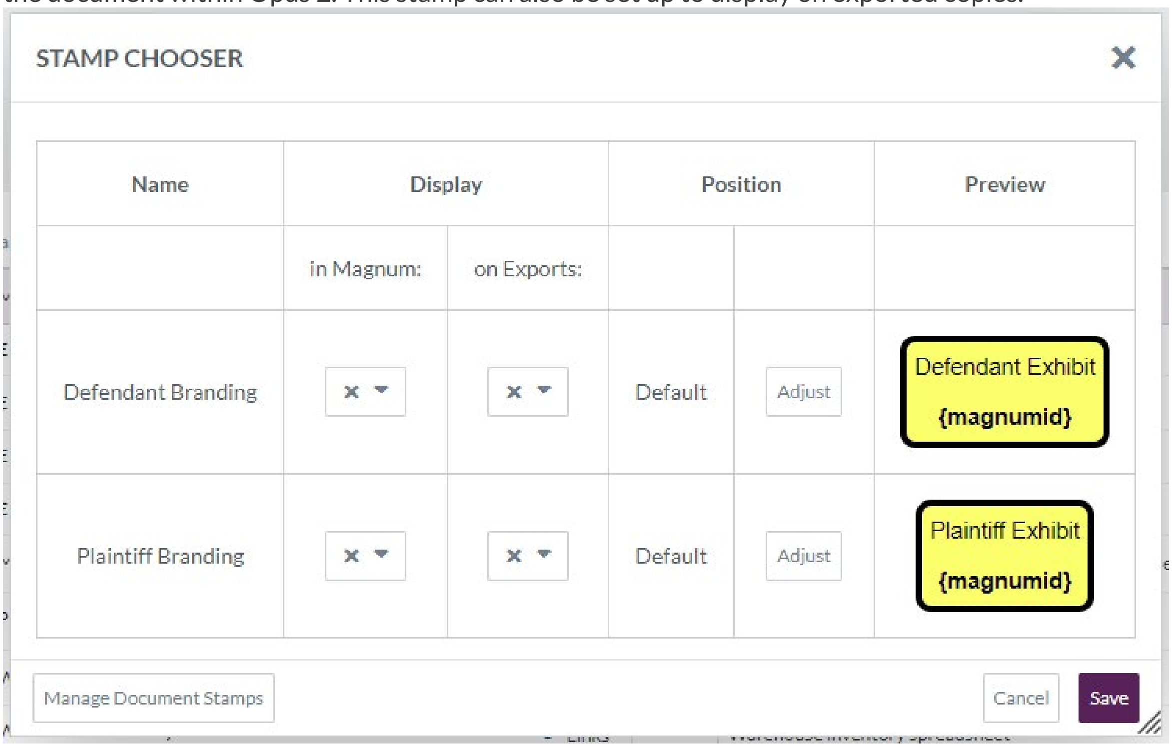
- Right-click on the document from which a stamp is to be removed and select **Document Stamps** from the menu.
- In the **Stamp Chooser** dialogue box, within the **Display** section, click on the **down arrow** to view the options for either the documents in Opus 2 or in exports.
- Select **Hide** under the desired setting (in exports, within the platform or both) to remove the stamp from the document.
- An X confirms that a stamp is hidden from a document. Simply change the option to **Show** if the stamp is to be displayed again.

Applying Document Stamps

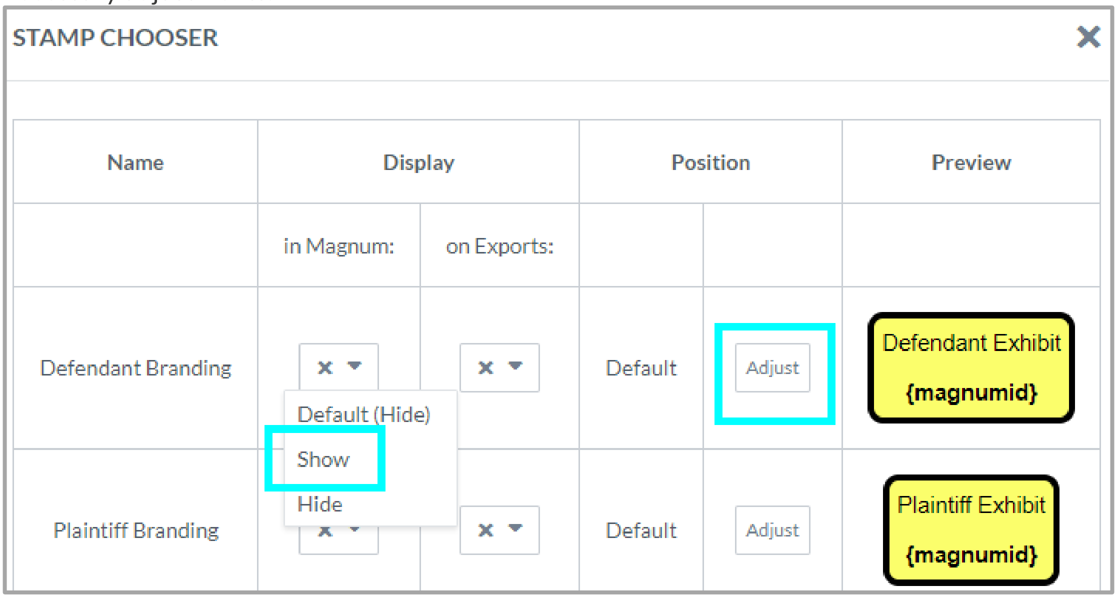
1. To apply Document Stamps, right-click on a document in the **Documents** tab. Click on **More...** and then select **Document Stamps** from the sub-menu.



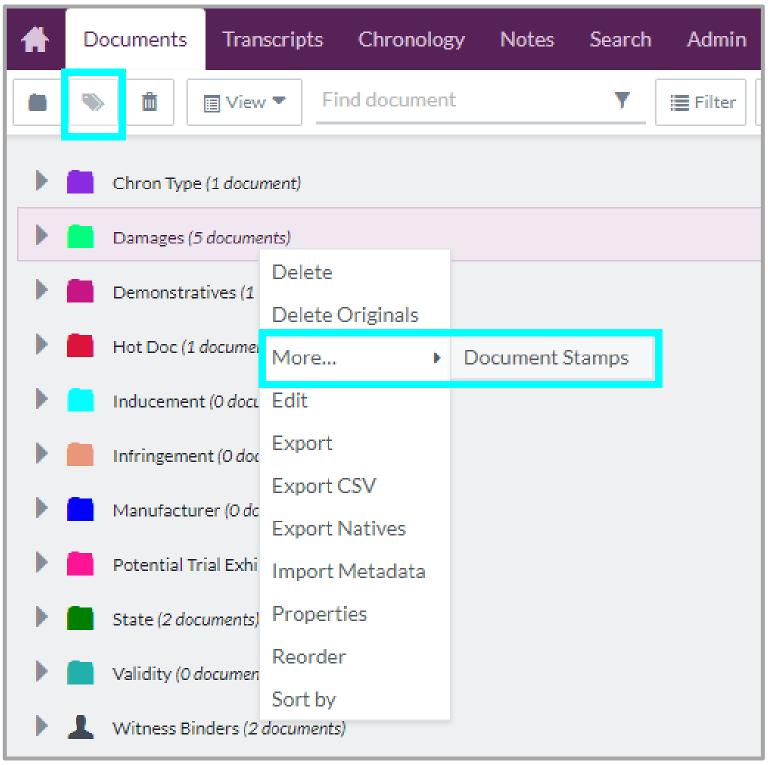
2. This will open the **Stamp Chooser** dialog box where a pre-existing stamp can be selected and applied to the document within Opus 2. This stamp can also be set up to display on exported copies.



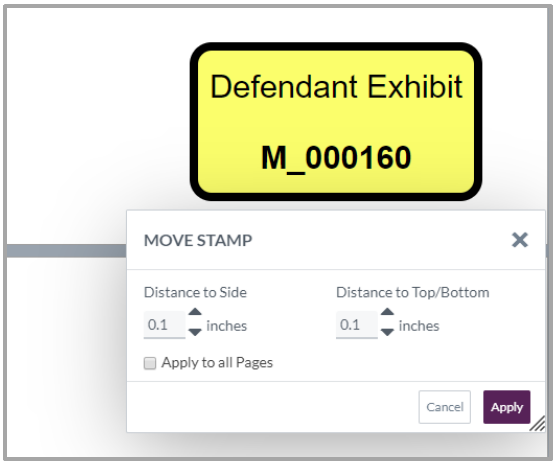
3. By default, all stamps are hidden.
    1. To **apply** a stamp or stamps to the document, click the drop-down in the **Display** column that corresponds to the **In Magnum** option, and select **Show.**
    2. To **adjust the position** of the stamp in the document, click **Adjust** under Position and enter the necessary adjustments.



4. Stamps can also be applied to multiple documents at a time. If all documents are in one folder in the Documents tab (either in the Columns view or Tags view), right-click on the folder (if ALL documents for stamping are within one folder) OR open the folder containing the documents. **Highlight** to select the desired documents, right-click, and select **Document Stamps**



5. To view a stamped document, double-click on a document or click on the **Document Preview**.
6. Once the document is open in a separate tab, the position of the stamp in the document itself may be adjusted. To make adjustments, click on the stamp and drag-and-drop it to the desired position. The **Move Stamp** dialogue window will appear and its distance values will change as the stamp is moved.



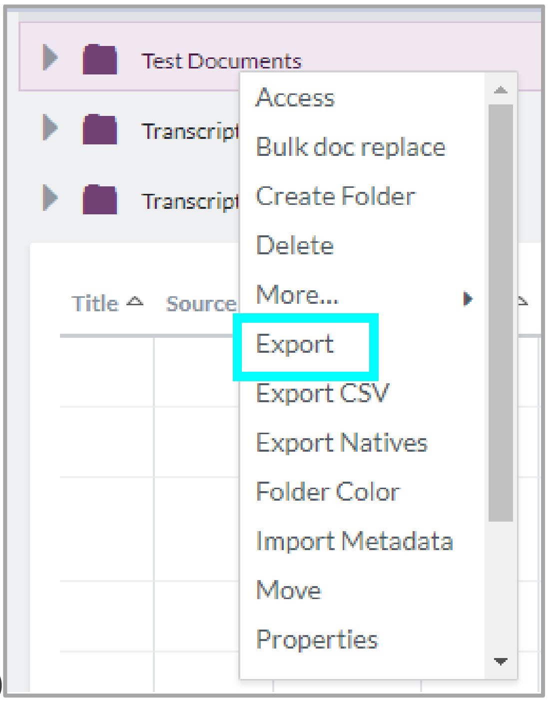
7. Click **Apply** to save your changes.

STAMPS vs. TAGS

If the documents are in different folders, it is recommended that **Document Tags** be used to identify the documents that need to be stamped. Refer to the Tags section of this User Guide for instructions on how to apply Document Tags. For example, if you want to apply Trial Exhibit stamps, you may create a Document Tag called "Trial Exhibits". **Apply the Tag** to all documents you want to **stamp**. Once the Tags are applied, switch to the **Tags view**.

DOCUMENT EXPORTS

1. The right-click **Export** function can be applied to any document, folder or to a multiple selection of documents and folders. Use the **Shift** or **Ctrl** key on the keyboard to select multiple documents and folders. (*__Note__: Exporting out a folder that contains subfolders will preserve the foldering structure exactly as it is in Opus 2.*



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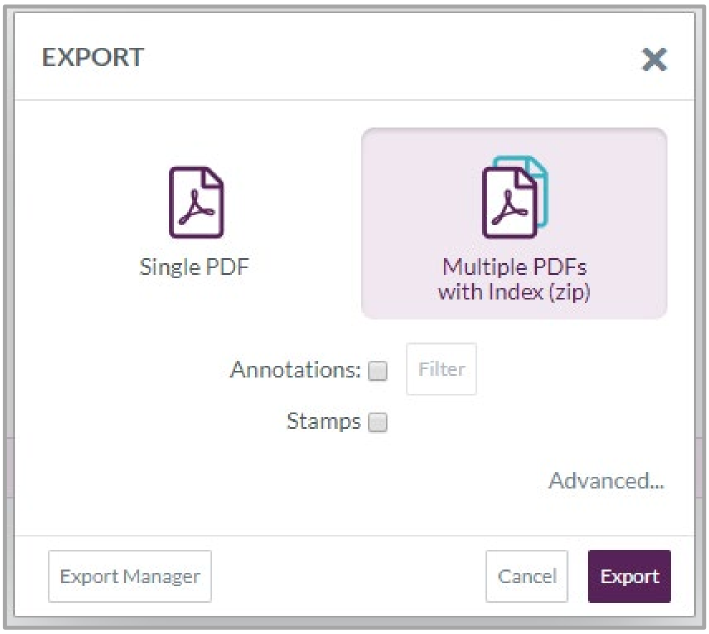
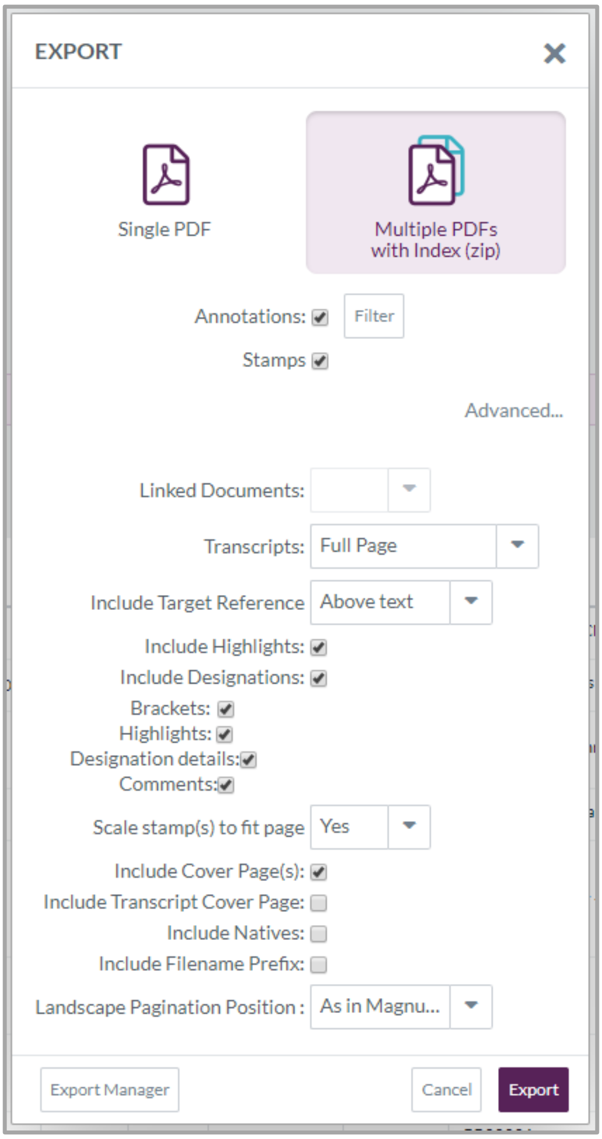
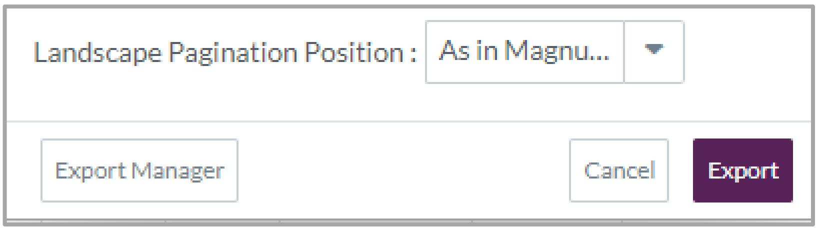
2. Export documents as a single PDF (combining multiple PDFs into one with a table of contents), or as multiple PDFs with a hyperlinked index (in a zip file). See more details in the table below.



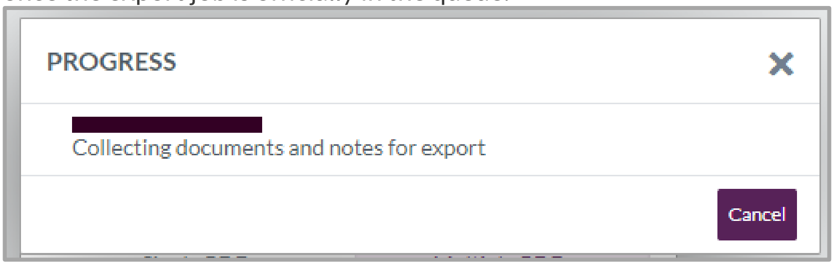
3. By checking the box next to **Annotations**, the User can include any notes that have been created or shared. The selection can be refined further by tag/author and groups by using the **Filter** button. (***Note:*** *Choosing to include notes will add time to the document export process)*



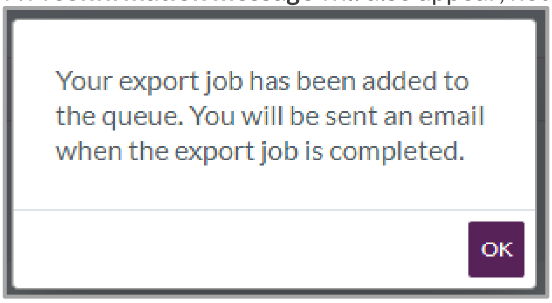
4. By checking **Stamps**, the User can include all document stamps set to be displayed on export.
5. Once all settings have been finalized, click on **Export** to start the export job.



6. A **progress bar** will instantly appear, indicating that the request is being submitted. This disappears once the export job is officially in the queue.



7. A **confirmation message** will also appear, notifying the user that the job has been added to the queue.



Export Basic Options

Single PDF	Combines selected PDFs into one PDF file
Multiple PDFs	Exports a series of individual files for each document within a zip file, with an HTML index to navigate the system. • Please note: Links in HTML index will only work after the zip file has been unzipped/extracted.

Export Advanced Options

Advanced Export Option	**Description**
Linked Documents	Choose to include the hyperlinked documents in the export. • Hyperlinked documents will be included in a linked documents folder, named with the document name containing the links.

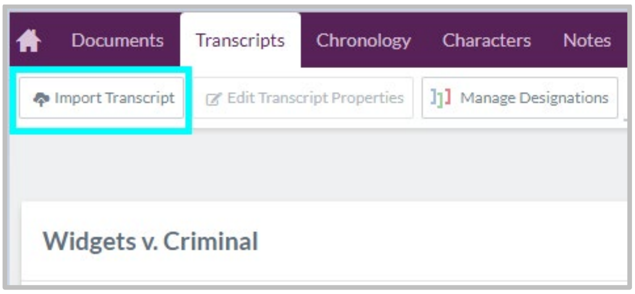
Transcripts	Customized page formats for transcript: • Two per page (default) • Four per page (do not use if including designations) • Full page
Include Target Reference	Choose to include the name of the hyperlinked document in the following ways: • Above text (linked document name floats above linked text) • Left Margin (linked document name included in left margin) • Right Margin (linked document name included in right margin) • Overwrite (linked document name overwrites linked text) • Not Shown (original blue underlined text)
Include Highlights	Choose to red highlight annotated text. • Click on 'Include annotations' to include note text in margin.
Include Designations	For electronic transcripts only: Choose to Include Designations in export. One or more of the following options must be clicked to include designations: • Brackets option: Choose to display bracket next to designated text. • Highlights option: Choose to highlight text in designated colors. • Designation details: Choose to include designation margin boxes.
Include Cover Page(s)	Choose to include a cover page with a hyperlinked index. • **Admin** will be able to customize the metadata fields included on the cover page.
Scale Stamps to Fit Page	Choose whether to adjust document stamps to the page during export.
Include Natives	Choose to include native documents in exported set.
Include Filename Prefix	Choose this to export in sort order. Opus 2 adds a prefix to the document name to set order in zip file.
Landscape Pagination Position	Change the positioning of the pagination: **- As in Opus 2** **- Portrait**

TRANSCRIPTS

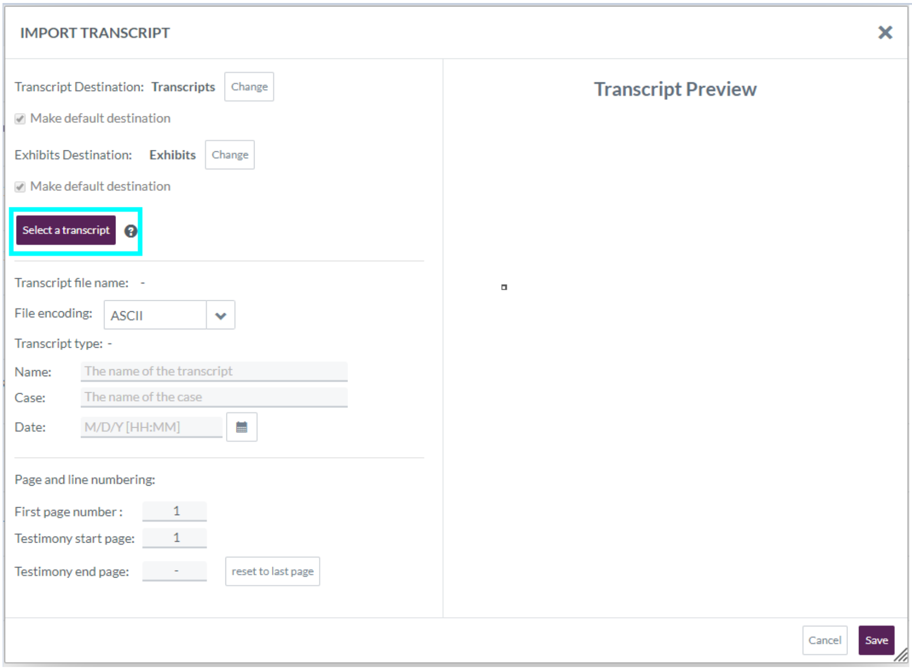
Opus 2 Users can upload transcripts for collaborative work among the case team and/or with co-counsel and opposing counsel. Transcripts in Opus 2 offer helpful functionality for designating and annotating testimony, linking exhibits, sharing Notes and exporting full copies of the Transcript that include selected work product.

Add a Transcript to the Workspace

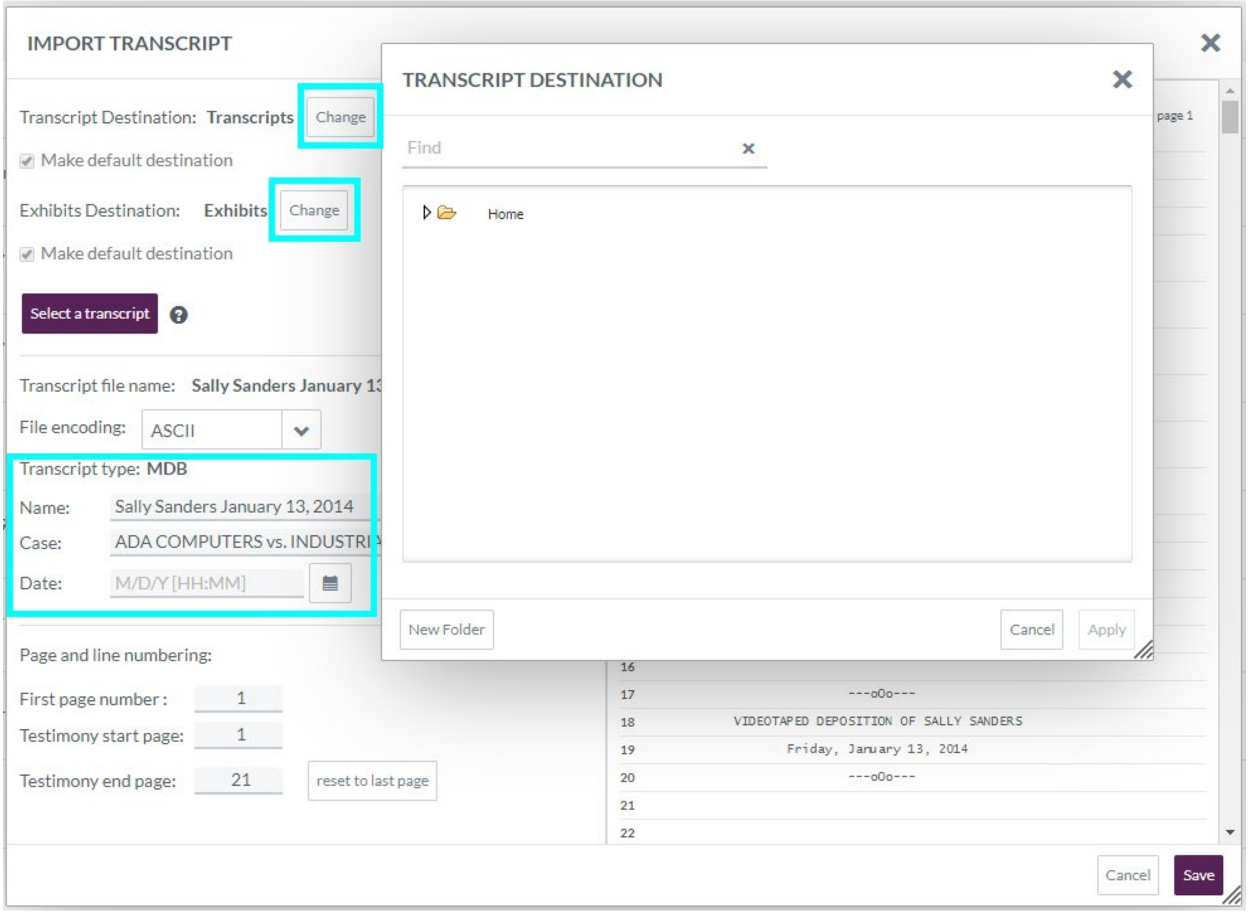
In either the **Documents** or **Transcripts** tab, click on the **IMPORT TRANSCRIPT** button.



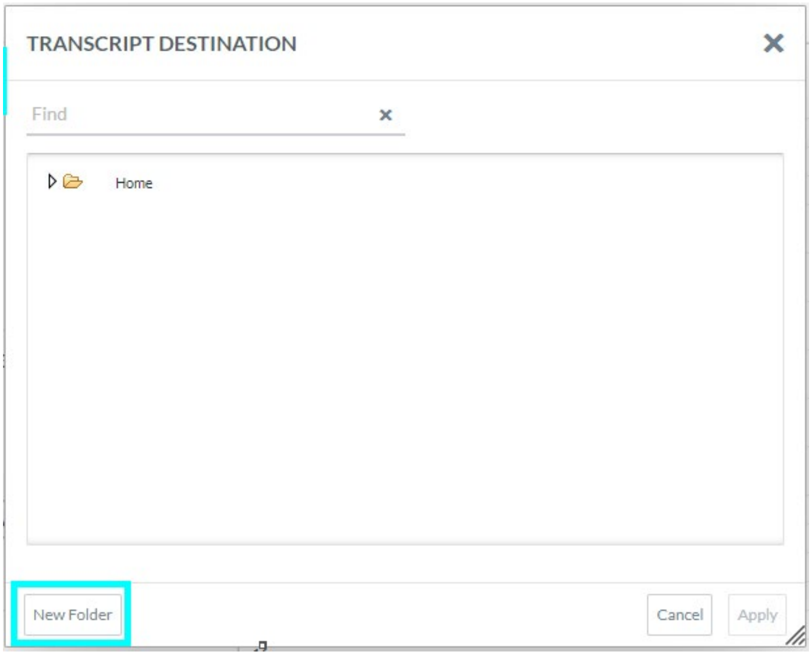
Drag and drop an Opus 2-supported electronic transcript file (ASCII, LEF, LTX, MDB, PCF, PTF, TRN, XML; *please see **Accepted File Types** guide document*) anywhere into the **Import Transcripts** window. Users may also click on **Select a transcript** and drill down to the file on their local drive.



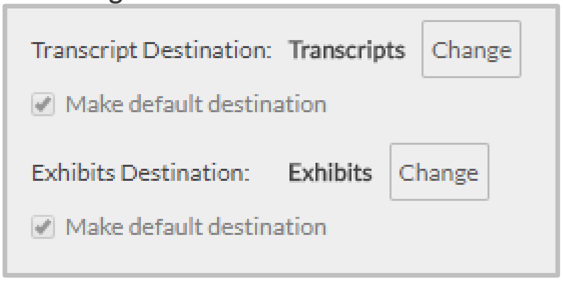
Once the transcript has finished parsing in the right-hand window, select the **destination folder** for the transcript (see Best Practices section below for details) and apply the appropriate deponent metadata for the transcript, then hit **Save.**



If the desired destination folder does not yet exist in Opus 2, users may also create one within the **Import Transcript** dialog box, via the **New Folder** option. Click on the **Change** button next to **Transcript Destination** at the top of the dialog.

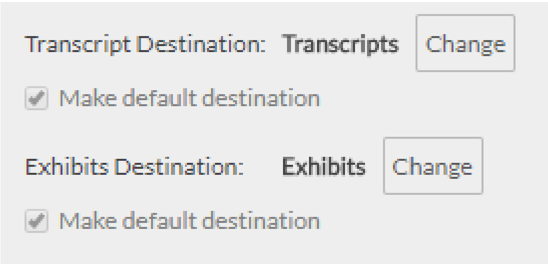


Users may also select or create a folder for exhibits that accompany the chosen transcript. Click on the **Change** button next to **Exhibit Destination** at the top of the dialogue.

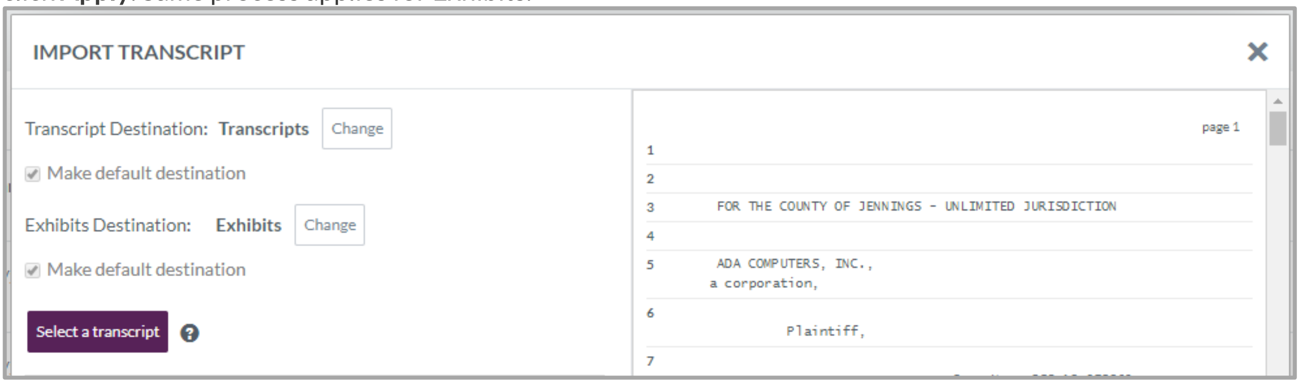


Best Practices for Transcripts

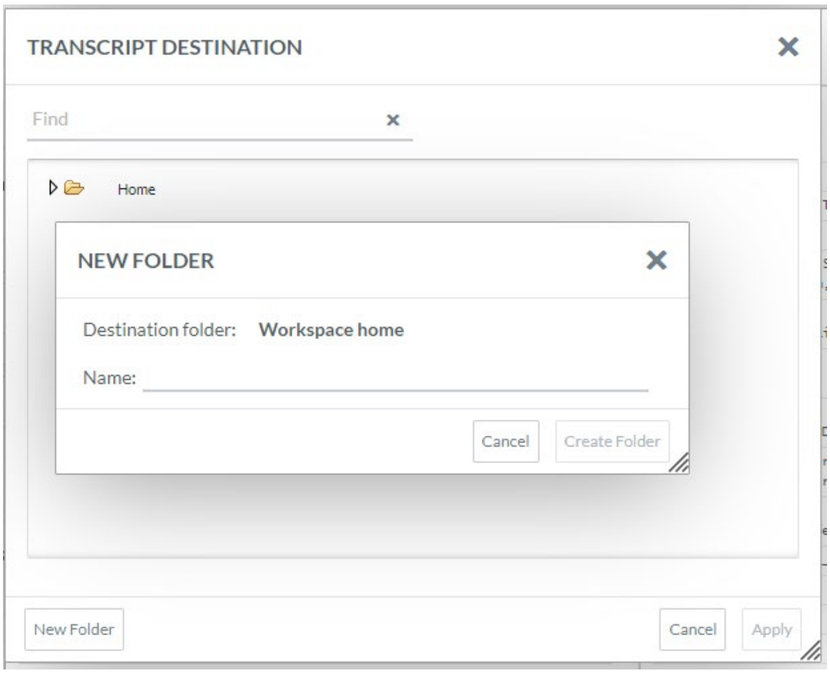
- Select the **destination folder** for the transcript. We recommend creating a "Transcript" folder to help organize all transcripts uploaded to the workspace.



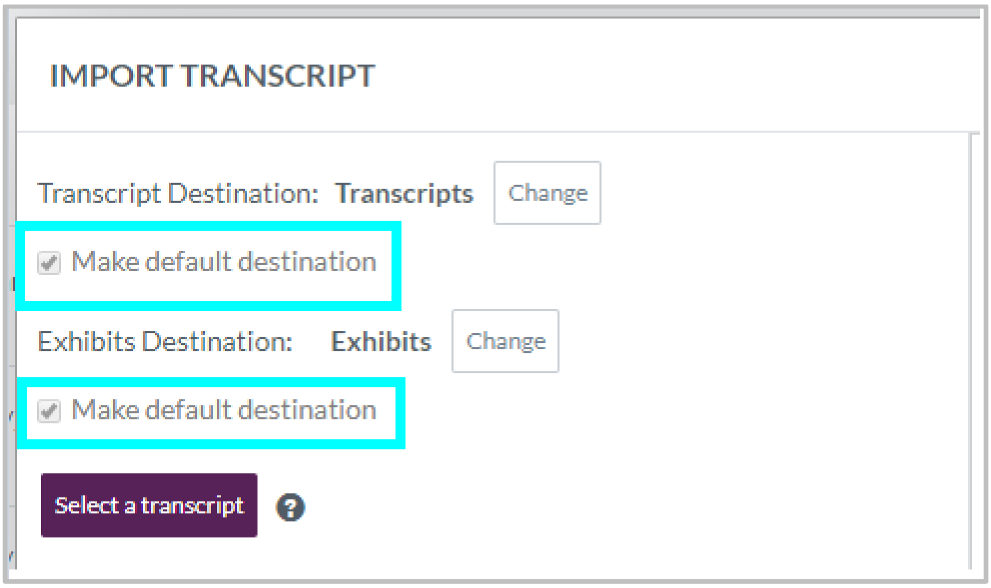
- To **assign a destination folder**: Click on the **Change** button next to **Transcript Destination,** which opens the Transcript Destination dialog box. Drill down to the desired folder, select the folder and click **Apply**. Same process applies for Exhibits.



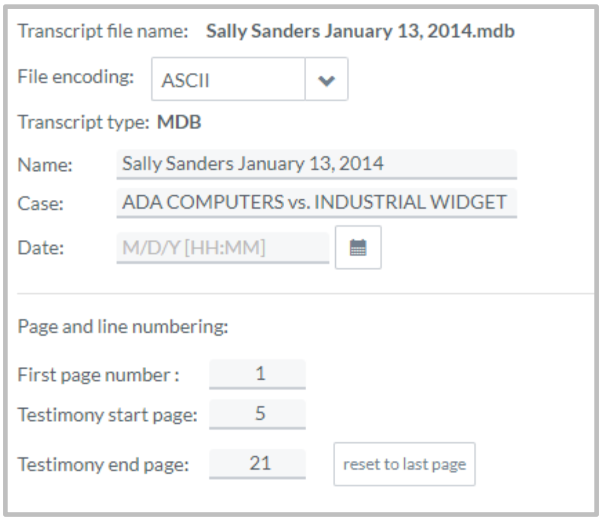
- A **new folder** can be created from within the **Import Transcript** box and assigned as the destination folder for either exhibits or transcripts, or both. Click on the "**Change**" button next to Transcript Destination or Exhibits Destination and select "New Folder" on the bottom left of the Destination box. Type in your preferred name for the new folder and click **Apply.**



- To make these selected or newly created folders the **default destination** for ALL transcript or exhibit uploads during your current browser session, check the box next to **Make default destination**.



- **Apply page numbering for testimony start and end** that accurately matches the original transcript. **TIP:** The actual testimony starts with the "**VIDEOGRAPHER**" introducing the deponent; running a search for the word "Videographer" in the transcript can help determine the start of testimony.



- **If transcript consists of only 1 volume**: First page number will be "1."
- **If transcript has more than one volume**: First page number will most likely start where the previous volume ends. This means the first page number may be a higher number, in the 100s if not higher.
- **Testimony Start Page**: The first page where the deponent's testimony actually begins.
- **Testimony End Page**: The last page where actual deponent testimony ends.

Replacing a Transcript with an Updated Version

Opus 2 users have the option to replace or update an existing version of a transcript in Opus 2. The **Transcript Replacement** function fully preserves all work product and eliminates the need to reapply links, annotations, designations and video when the current copy of the transcript needs to be updated.

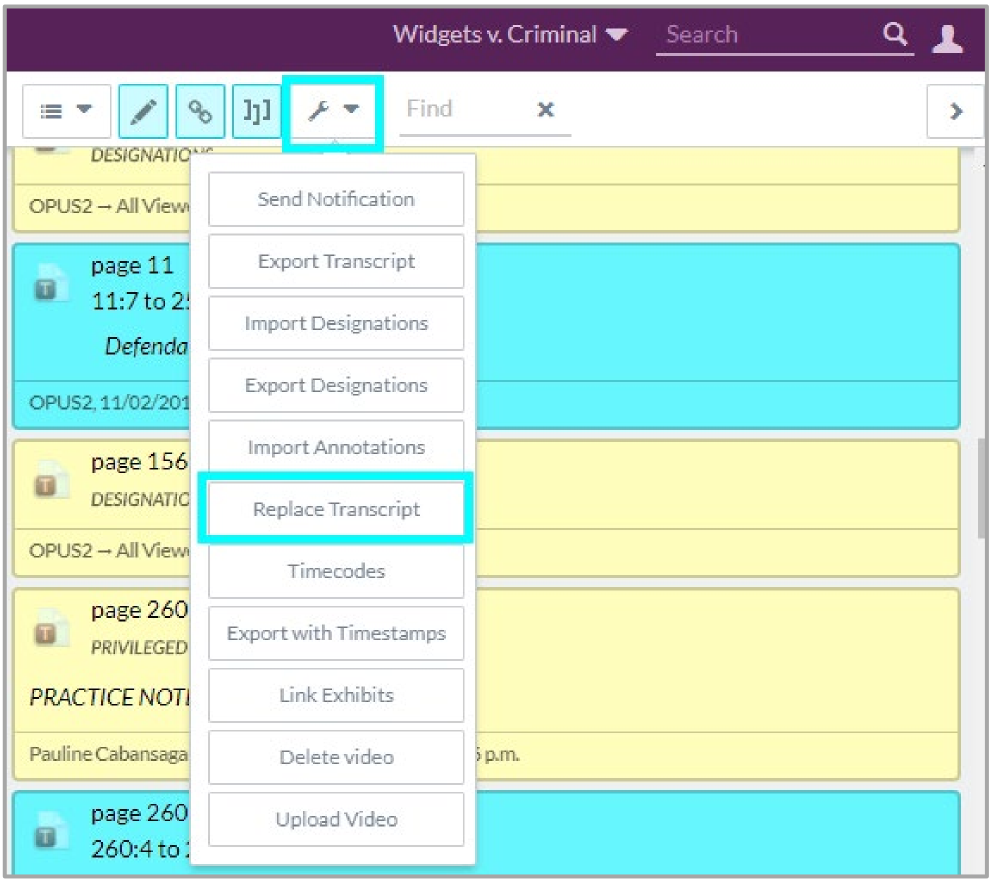
This is essential in the following scenarios:

1. Uploading videos: the transcript will need to re-uploaded in MDB format, which contains timecodes, at video upload time in order for videos to be correctly synced with transcript text.
2. Cosmetic issues with the initial transcript: pages are added/removed, or transcript does not contain 25 lines per page.
3. Replacing a ROUGH draft with a FINAL, polished copy of the same transcript.
    1. **NOTE**: if video was uploaded with the initial draft, the final (replacement copy) must be in **MDB format** to ensure that the video is synced with transcript text, as timecodes are contained in MDB files only.

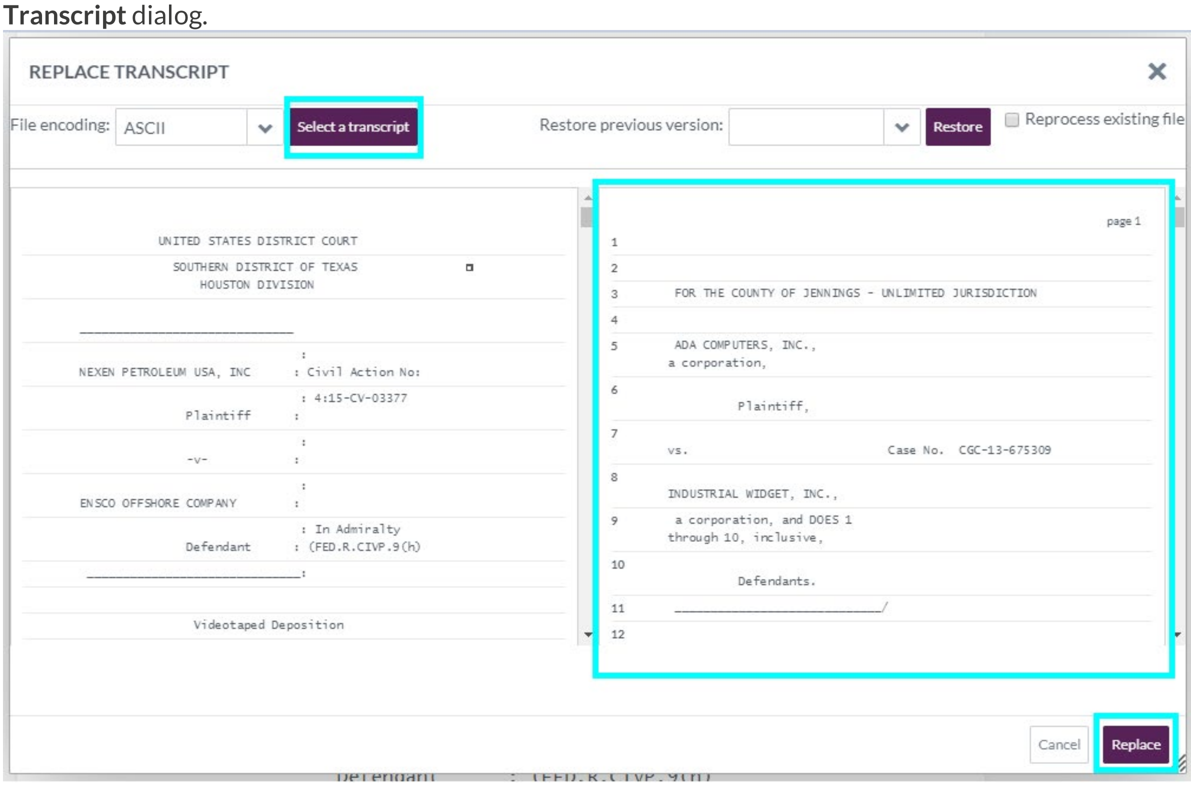
PLEASE NOTE: ***Replacement vs. Deletion***: *All* links, annotations, designations and video already assigned to a transcript in Opus 2 will be preserved after a transcript is **replaced**. However, *all* current annotations, links, designations and video will be lost if the user opts to **delete** the Transcript and then either re-import the same version of the document or import a new version of the document.

Also, it is not necessary to replace an ASCII or LEF Transcript with an MDB file; an existing ASCII/LEF/MDB transcript can be replaced with another transcript in the same format (ASCII/LEF/MDB).

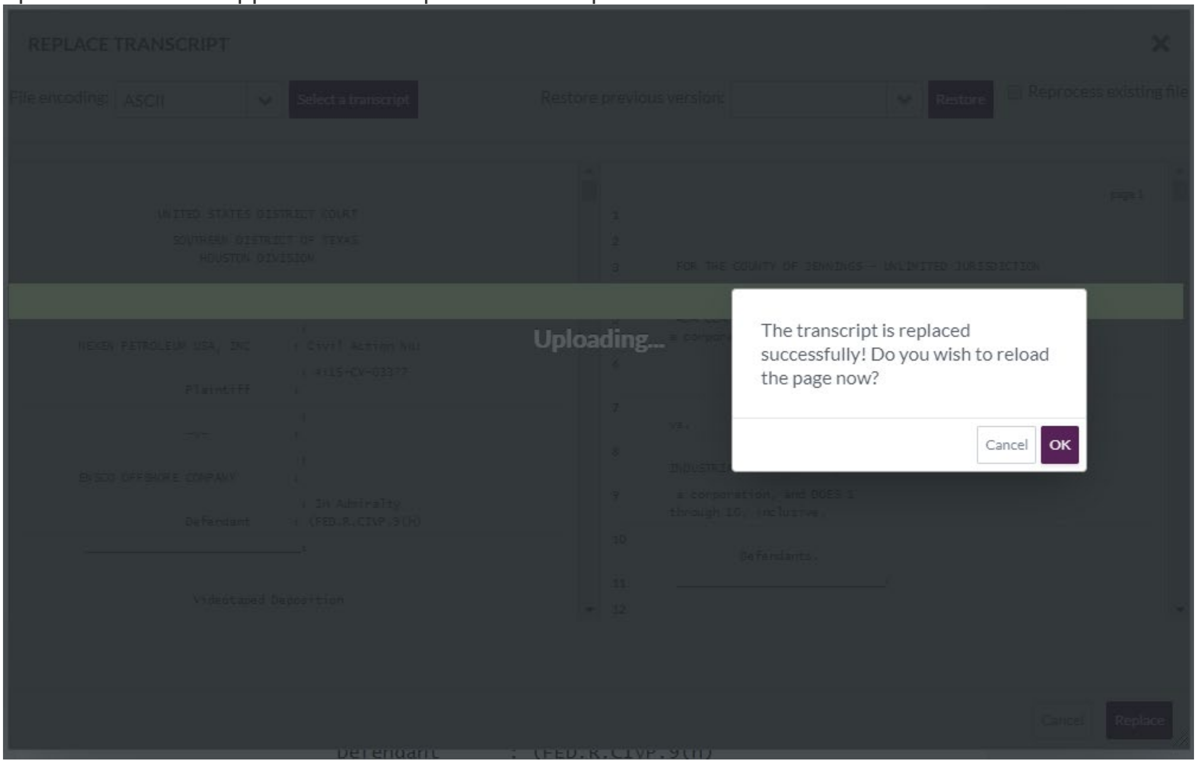
1. In Opus 2, navigate to the transcript to be replaced. Once it is open, click on **Tools** and select the **Replace Transcript** option.



2. The **Replace Transcript** dialogue will appear on screen; the first page of the transcript's current version in Opus 2 will be shown on the left-hand side.
3. Click on **Select a transcript** and drill down to the replacement transcript on the local PC or network drive. Click on the file to select it.
4. Once the replacement is selected, it will be listed on the right-hand side of the preview pane in the **Replace Transcript** dialog.



5. Click on **Replace**.
6. Opus 2 will then replace the existing copy of the transcript in Opus 2 with the selected version; a pop-up notification will appear when the process is complete.



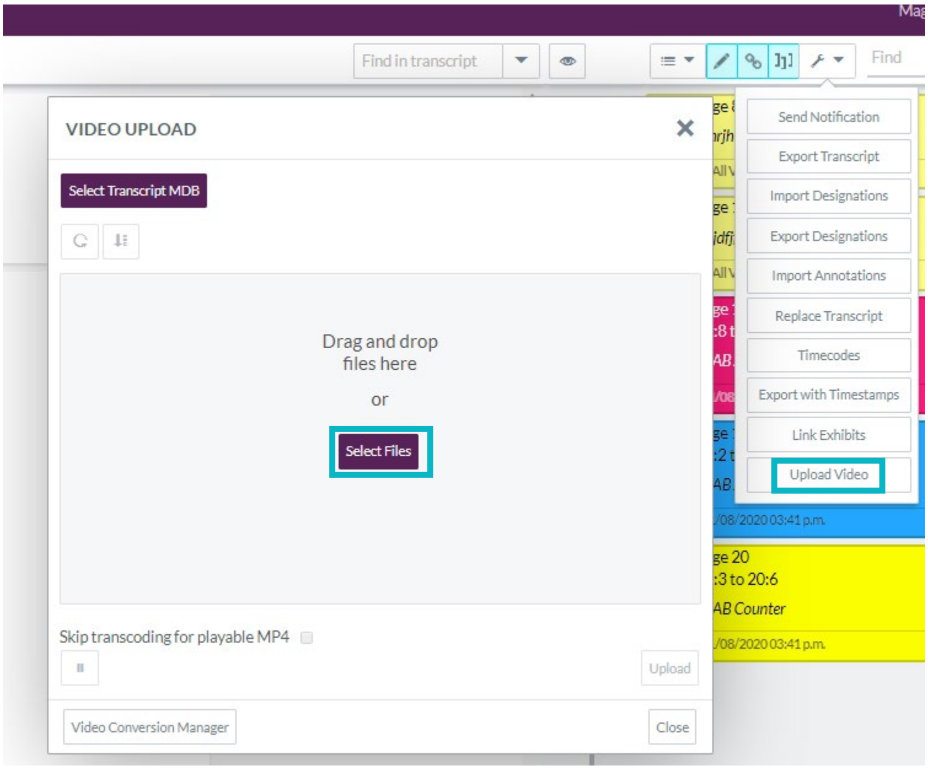
7. Click **OK** to reload the Transcript view in Opus 2. This completes the transcript replacement process and all annotations, links, designations and video remain in place as in the original copy.

When adding a rough/temporary draft of a transcript that is meant to be replaced later, please follow the below steps:

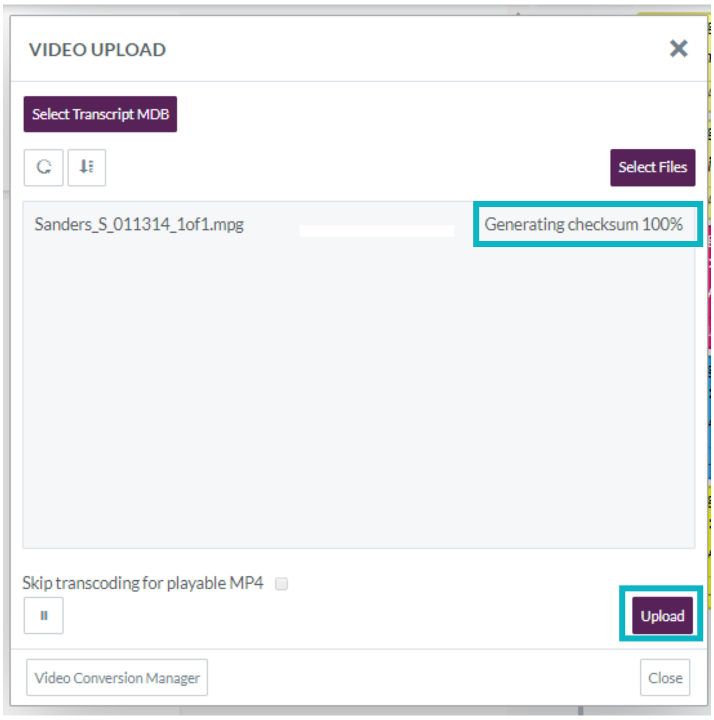
1. Import the ROUGH copy of the transcript into Opus 2.
    1. If no work product is applied to the ROUGH copy, the user may delete it **AFTER** uploading the FINAL copy.
    2. If work product has been applied to the ROUGH copy, continue to step #2.
2. Upload the FINAL copy (in LEF file format) via the Import Transcript function.
3. Once the final copy has been uploaded to Opus 2, navigate to the Documents tab. Locate the final transcript name within its respective folder, right-click, and select **Import Notes.**
    1. Select the rough copy of the transcript that contains the work product.
4. Confirm that all notes and designations have been completed and correctly imported to the **FINAL** copy of the transcript.
5. Delete the rough copy.

Uploading Video to Transcripts

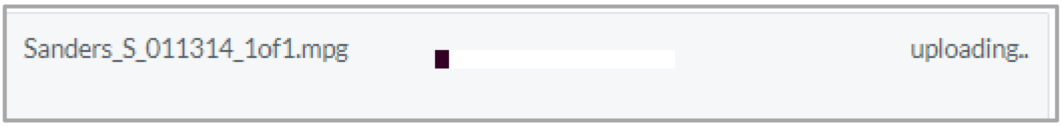
1. In the **Transcripts** tab, select the Transcript to which the video corresponds, and click on the Transcript name to open.
2. Click on the **Tools** (wrench icon) and select the **Upload Video** option.



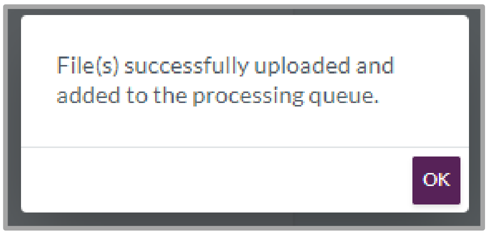
3. Go to the **Video Upload** dialog. **NOTE**: Opus 2 needs the **MDB version** of the Transcript in order to access the necessary timecodes and sync the video with the Transcript text. **If you would like to update the current transcript with its MDB version,** please click on **Select Transcript MDB** and drill down to the MDB version of the Transcript on the local PC or network drive. Once the MDB version of the Transcript has been selected, another pop-up appears on screen asking to confirm if the user would like to update the Transcript in Opus 2. Click **Yes** to initiate upload. Once clicked, control returns to the **Video Upload** dialog and the MDB transcript will now be listed above the file selection box.
4. Now the corresponding video in MPEG or MP4 video file format can be uploaded. Click on **Select Files**. OR **drag and drop** the file(s) from your local drive so that they appear in the **Video Upload** dialog.
5. At this point, Opus 2 will start generating a checksum on the video file(s). Once all checksums are at 100%, click on **Upload**.



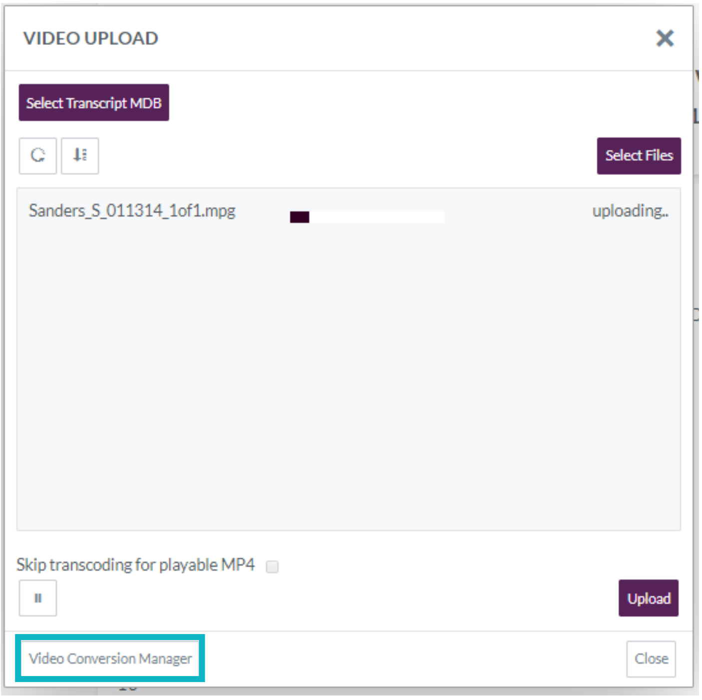
6. Opus 2 will begin uploading the video file(s). A progress bar will be filled in as Opus 2 works through the upload process until it is 100% complete.



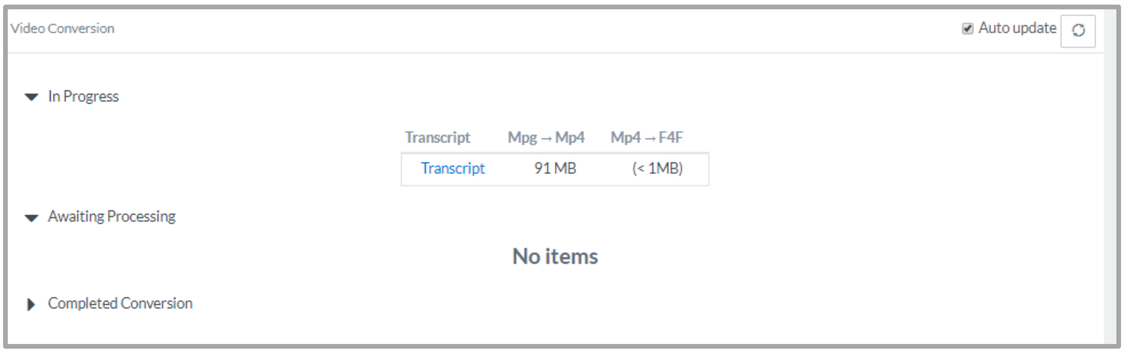
7. Once all video file(s) have been uploaded, another pop-up will appear on the screen to indicate that the file has been added to the processing queue. Click on **OK.**



8. Back in the **Video Upload** dialog, click on **Video Conversion Manager,** which opens the Video Conversion Manager page. This is where users can monitor progress as Opus 2 converts the uploaded video file(s) to a single MP4 file.

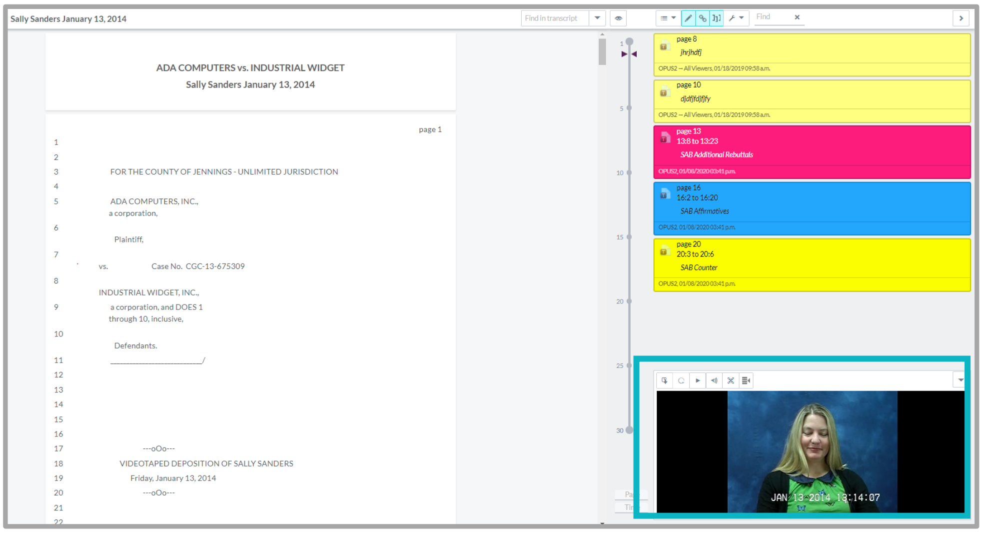


9. Once the video conversion process completes for a Transcript, the job will then move into the Completed Conversion phase.



10. Go back into the Transcripts tab and refresh the browser cache (CTRL + SHIFT + R).

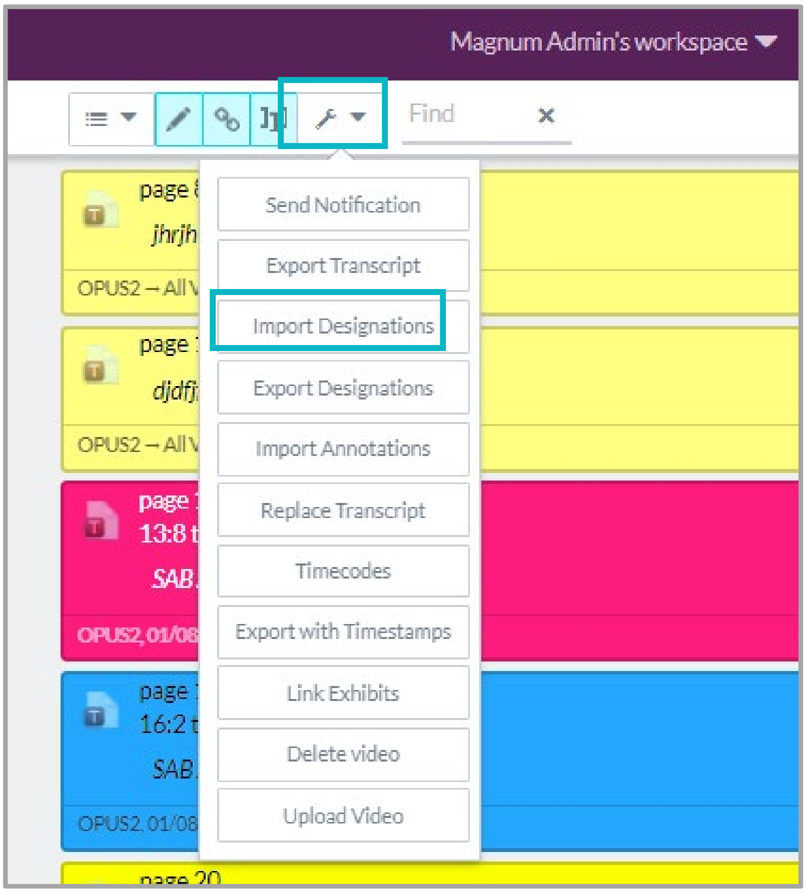
11. A media player window should now appear in the bottom right-hand corner of the **Transcript** page. Hit the **Play** button and the video will play; it should also now be in sync with the Transcript text.



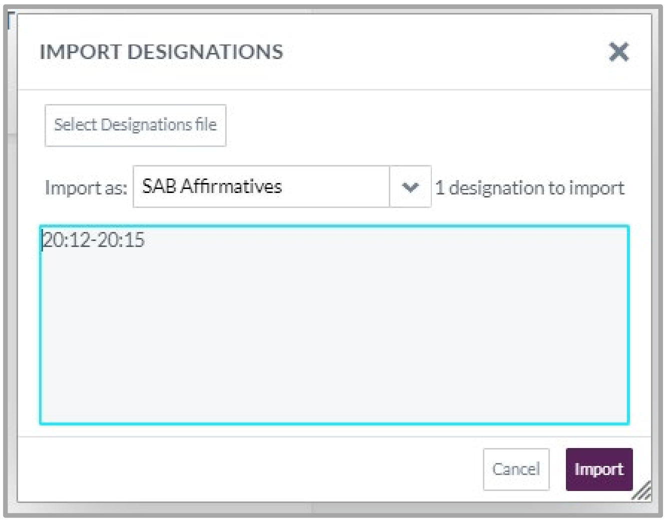
DESIGNATIONS

Applying Designations to Transcripts (Import Designations)

1. In the transcript, click the **Tools** button (wrench icon), and choose **Import Designations**.



2. The Import Designations dialogue box will display. Paste or type a list of designations, or import a file from the local drive with designations in the accepted Opus 2 format: **page:line-page:line**; e.g. 16:6-16:23.



3. Choose the type of designation in the drop-down **Import As** menu. Click on **Import** ONLY after choosing the correct Designation type. **WARNING:** Do not click on **Import** until the Designation type has been correctly selected in the drop-down **Import As** menu. If the incorrect Designation Type is chosen, the designations will have to be deleted manually and re-added in the order detailed above.

TIPS FOR CORRECT DESIGNATION FORMAT:

- Designation ranges must be in sequential order.
  - Incorrect: 20:15-20:12
  - Correct: 20:12-20:15
- For a ONE-LINE designation, please fill out both sides of the range:
  - Incorrect: 20:12
  - Correct: 20:12-20:12

Opus 2 will display an error message if the range is out of bounds or out of order.

Bulk Designations Import

Setting up the XLS/XLSX import file

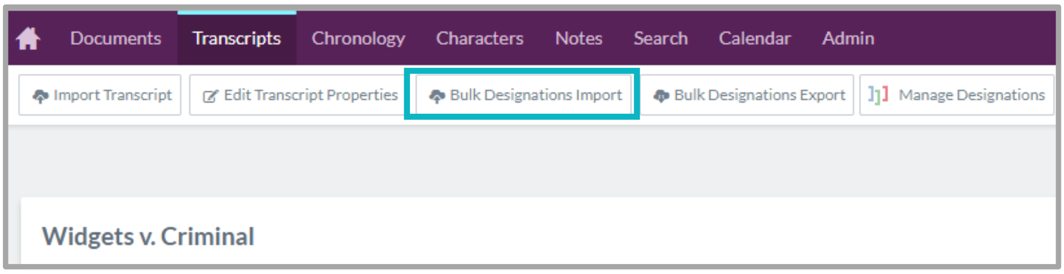
In order to set up a file that is compatible with Bulk Import Designations tool, each value to be imported in should be in its own separate column in Excel, with page and line values in separate columns, matching the format that is exported out of Opus 2. For instance, the first column should be the Transcript name, the next column should be start page number, the next should be start line number, followed by end page number, etc. See the example below:

Transcript	Start page	Start line	End page	End line	Comments	Designations
Kent Final	15	1	15	24	For Review	Plaintiff
Sinet, Jean-Claude	34	17	34	18		Defendant
Sinet, Jean-Claude	34	20	25	13		Defendant
Sinet, Jean-Claude	36	3	38	9		Defendant
Sinet, Jean-Claude	38	11	38	12		Defendant

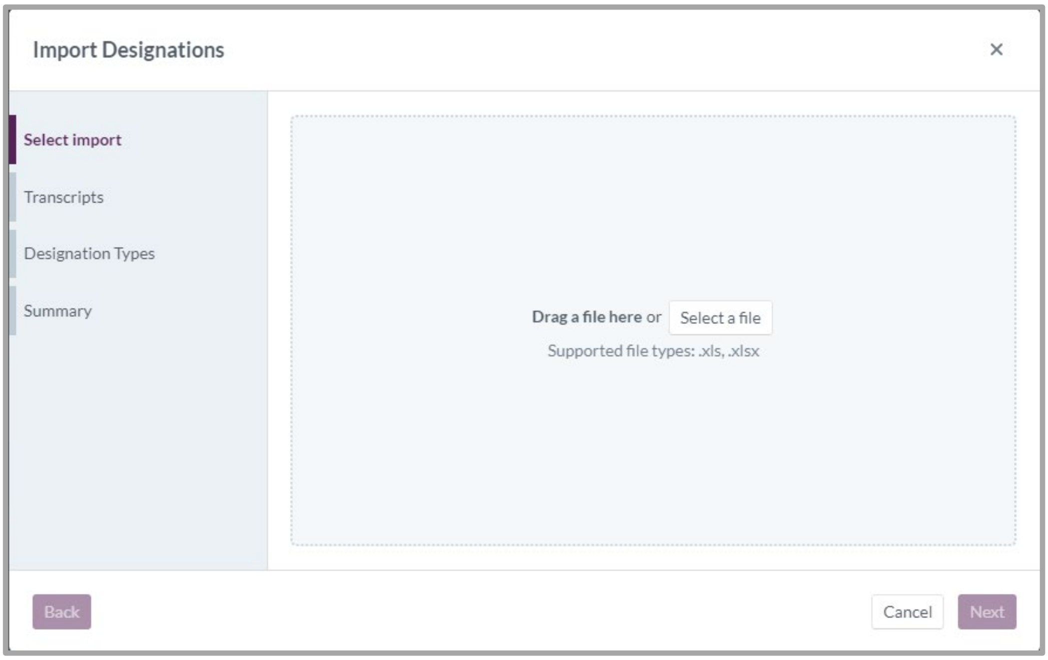
Once all details are added in the correct format, save the file as an XLS or XLSX file. It is now ready for import.

Import Designations

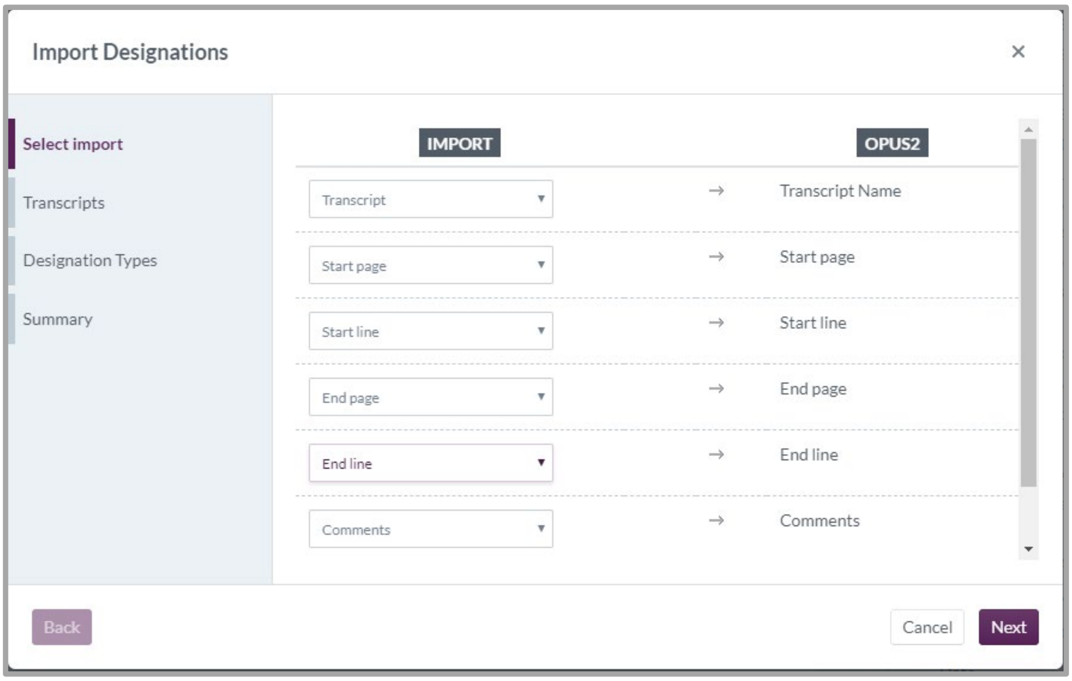
In the Transcripts tab, click on the **Bulk Designations Import** button.



In the **Import Designations** dialog, drag and drop your import file, OR, click on the **Select A File** button to navigate through your local drive to locate and select your file.



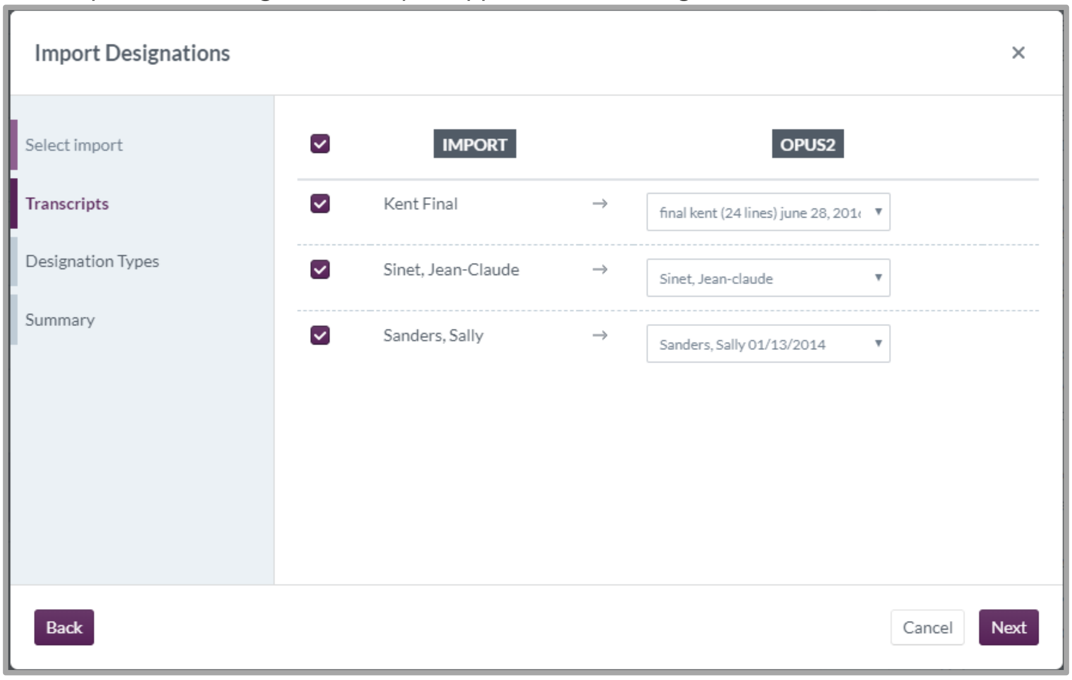
Once the file is selected, each column header in the XLS/XLSX file will be matched with a corresponding Opus 2 field. Click on the downward arrow next to each column name if you would like to change the import header name selection:



Once the import file header names are correctly matched up with their Opus 2 counterparts, click **Next.**

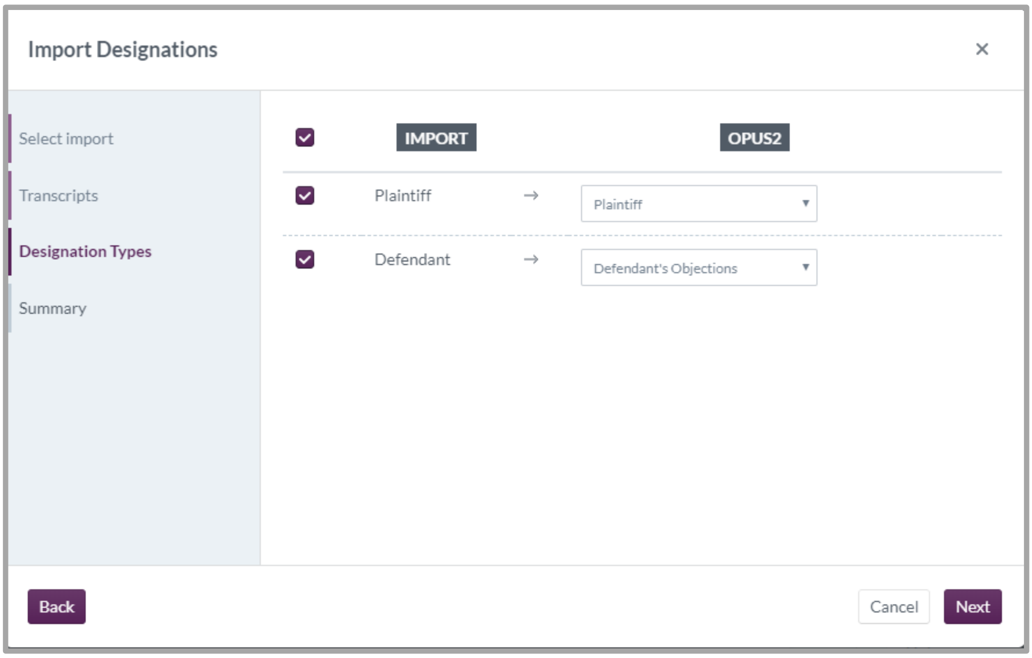
This leads to the **Transcripts** dialog. Here, the Transcript names from the import file are matched up with their possible counterparts in Opus 2. **NOTE:** If the transcript was not imported to Opus prior to the import attempt, no match will be found in this dialog.

BEST PRACTICE: Carefully check for correct matching with transcript **dates,** particularly for multi-volume transcripts, as the designations may be applied to the wrong volume if the dates are not checked.

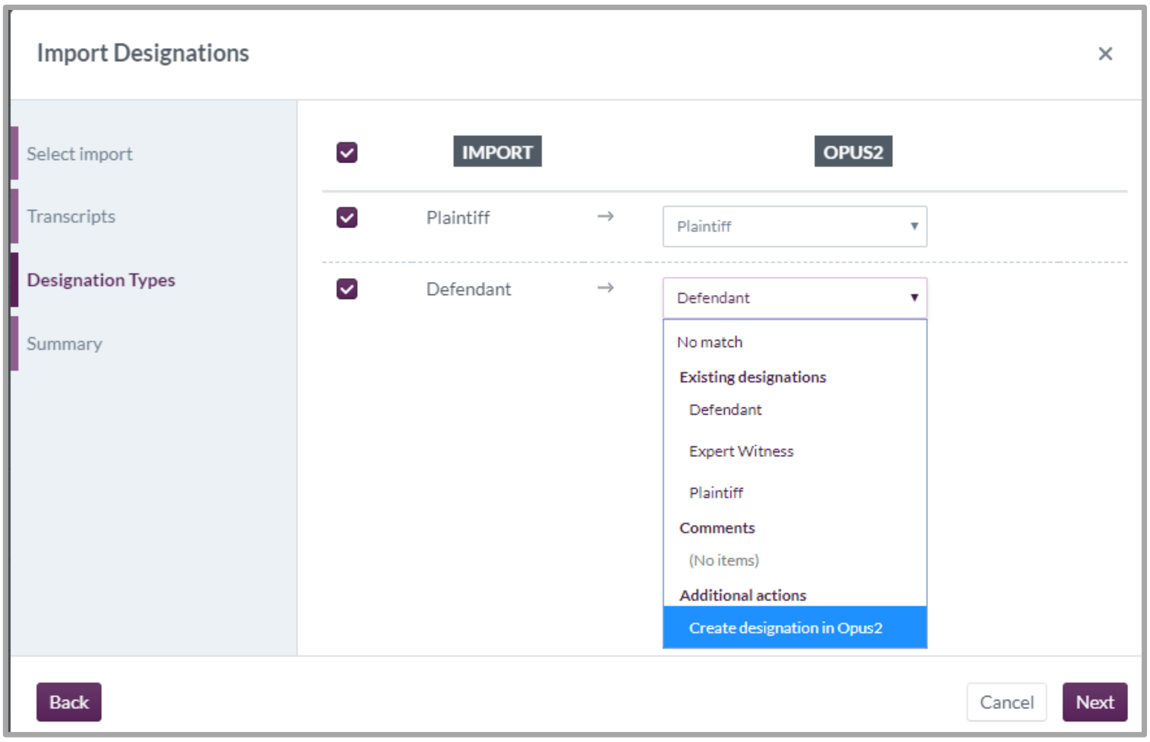


Hit **Next** once all Transcripts are correctly matched.

This leads to **Designation Types.** Match up the import file Designation Type values with their corresponding ones in Opus 2; choose from the list of existing types by clicking on the downward arrow.

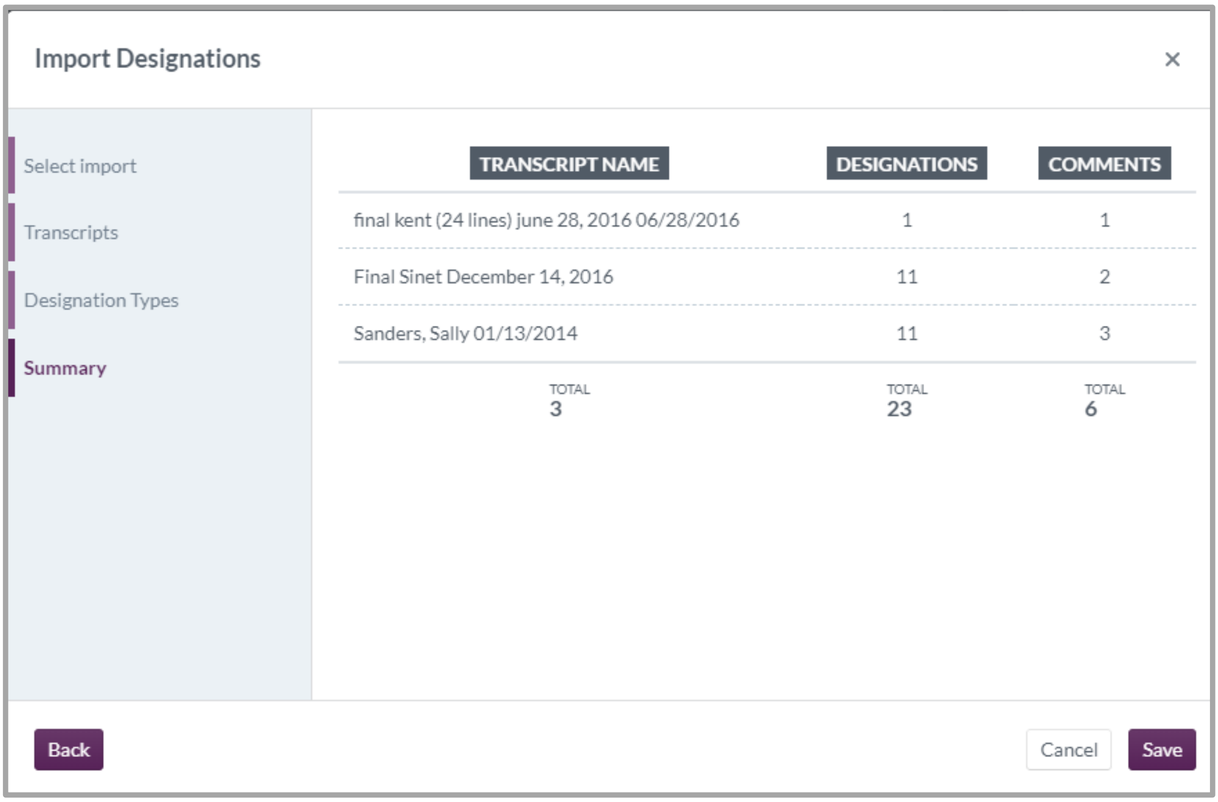


If the Designation Type does not yet exist in Opus 2 and is not on the list, you can create it by selecting the option Additional Actions > "Create designation in Opus 2" from the bottom of the drop-down list.

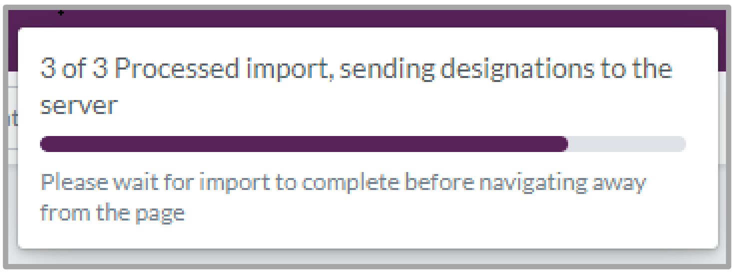


Once the Designation Types are correctly matched up, hit **Next.**

You are now ready to view the Import Summary page. Review all the details displayed prior to hitting **Save,** which then starts the applications of Designations and Comments.



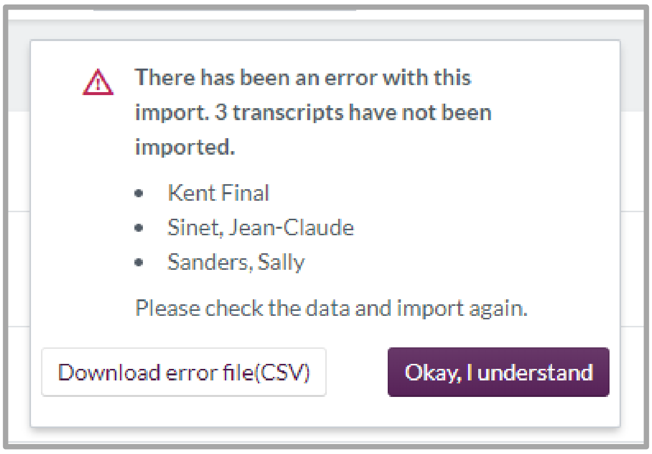
A status window will appear, displaying the progress of the task.



Once this process completes, you should now be able to view your Designations and Comments within their respective Transcripts.

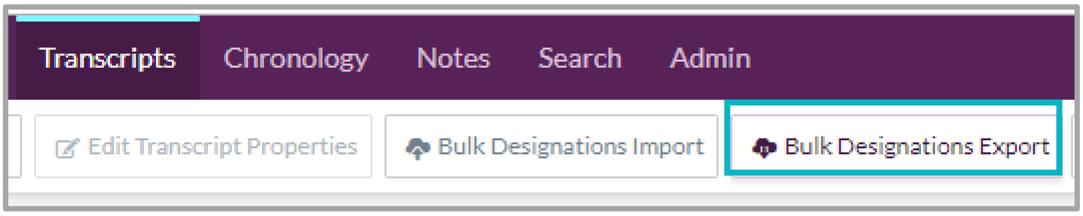
Import Errors

If any of the Designations or Comments are not applied for any reason, an **error report** will be produced and can be downloaded as a CSV.



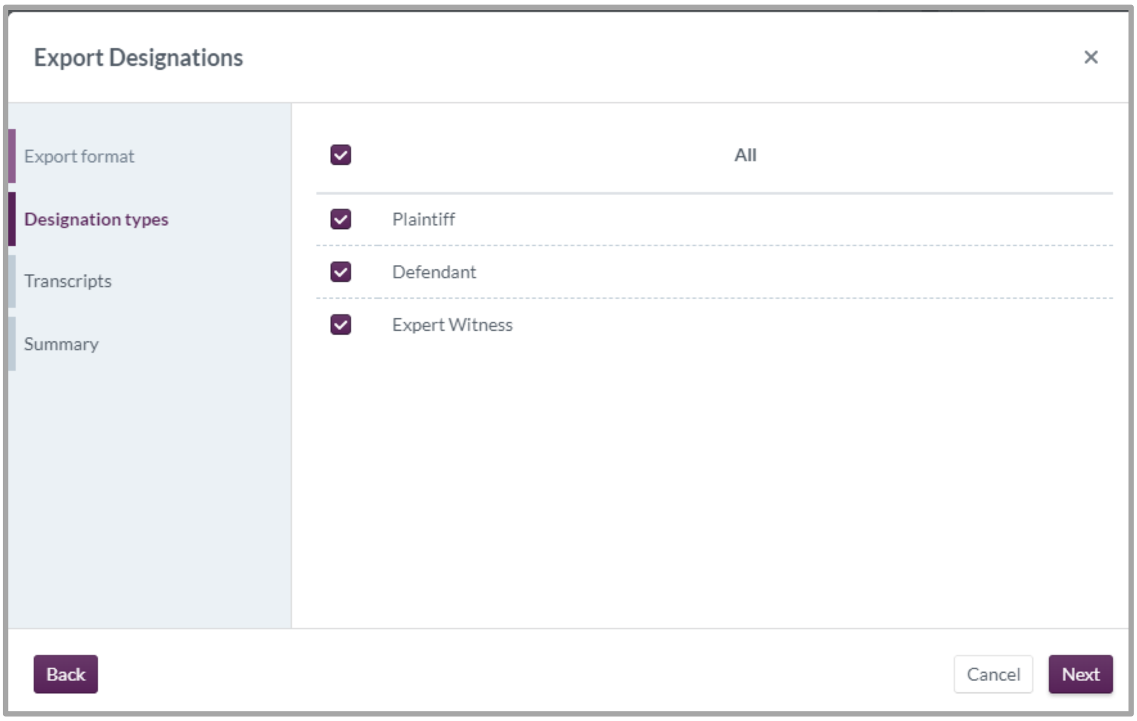
Bulk Designations Export

Click on the Bulk Designations Export button at the top of the Transcripts tab. This will launch the **Export Designations** dialog.

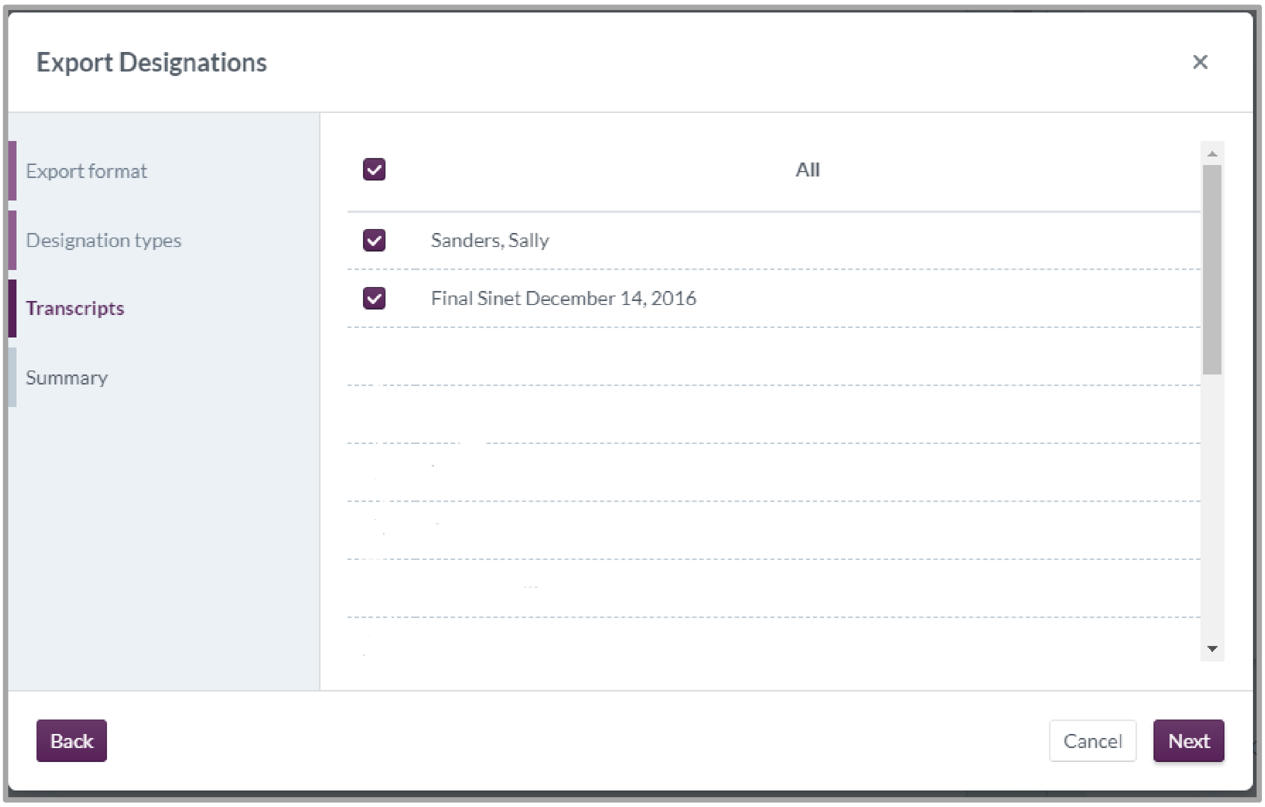


In **Export Format,** make your selection between **Single sheet** (all deponents in one Excel sheet) or **Multi sheet** (one deponent per Excel sheet). Once done, hit **Next.**

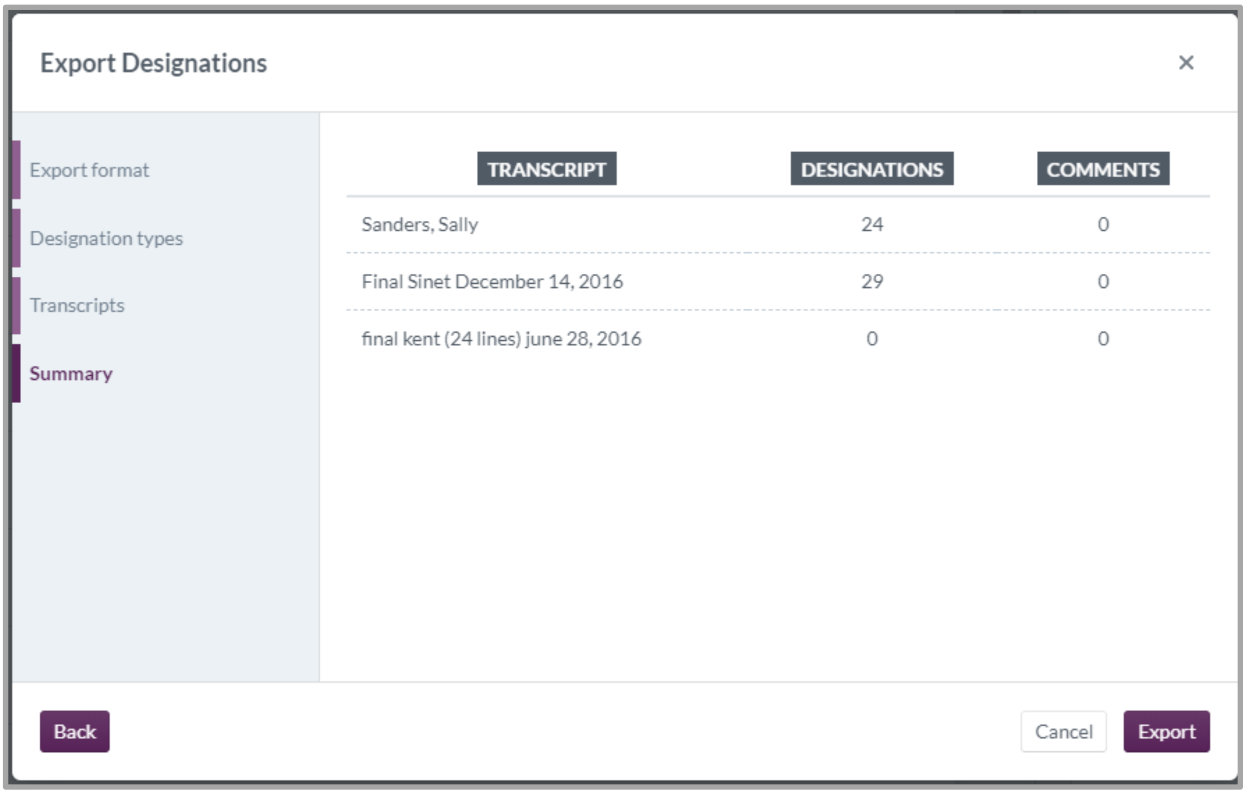
Next, select the Designation Types for export from the list of existing types in Opus 2, and hit **Next.**



Then, select the Transcripts from which the desired Designations will be exported from. If you would like all Transcripts to be included, select "All" at the top of the list. Once you've made your selections, hit **Next.**



A **Summary Page** will display the numbers of Designations and Comments to be exported per Transcript. If all looks good, hit **Export** to begin exporting.



This will launch your local drive's window, allowing you to select a folder or location to which the export file(s) will be downloaded and saved. You can also rename your export file(s) from here, prior to saving. Once saved, your export file(s) should now be ready for viewing and sharing.

Bulk Import of Comments to Existing Designations

The new Bulk Designations Import tool allows users to add both Comments and Designations to multiple transcripts and for multiple Designation Types at one time and using only one Excel file. What's useful about this tool is that users can not only create NEW designations and comments together but can also ADD new comments to designations that were previously applied to transcripts in the workspace. The process, which is slightly different from when you are creating a new set of comments and designations together, is detailed below:

Adding Comments to Previously Applied Designations

- Create a ROW in the spreadsheet with the details for the designation to which the comment will be applied. No need to list the designations out separately in a different row (doing so will create a **duplicate** designation upon import).
- **IMPORTANT**: Users need to ensure that the range and name of the designation (designation type) matches exactly with the those of the designation(s) in Opus where you want the comments added. For this reason, as a BEST PRACTICE, we recommend first **exporting a report of designations** from the desired transcript(s) and copying the necessary values for the designations you are adding comments to, from there.

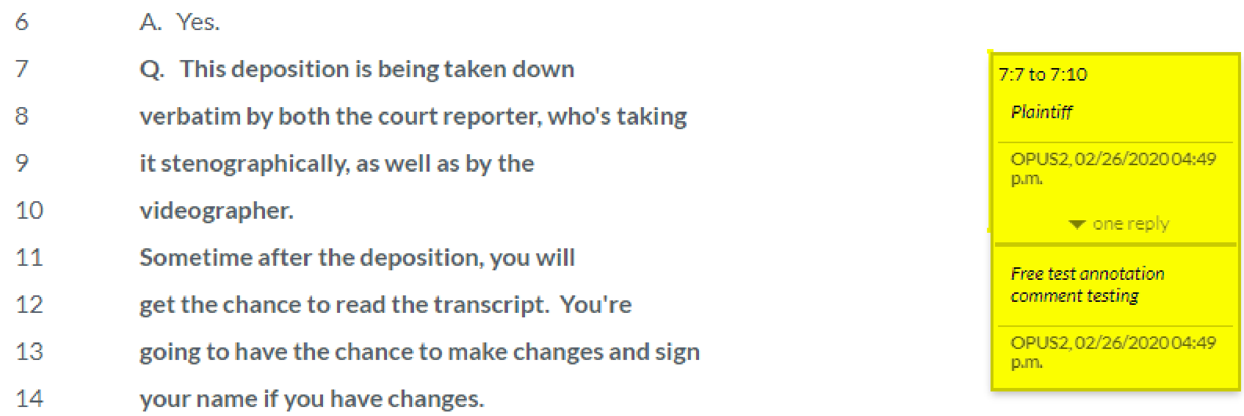
Below is a sample of a correctly formatted Comment import spreadsheet:

Transcript Name	Designation	Start Page	Start Line	End Page	End Line	Comments
Bangs, Martin	Defendant	6	1	6	6	Free text annotation comment testing

Bangs, Martin	Defendant	6	4	6	8	Free text annotation comment testing
Bangs, Martin	Defendant	6	4	6	8	Free text annotation comment testing – 2nd comment
Bangs, Martin	Plaintiff	7	7	7	10	Free text annotation comment testing

Once your file is ready, proceed to follow the steps for using the [Bulk Designations Import tool](#) to bring the designations and comments in your file into the transcript(s). The new comments will be added to the corresponding designations outlined in your spreadsheet.

The below example from an Opus 2 transcript shows the comment added to the Plaintiff designation in ROW 5 of the above sample spreadsheet:

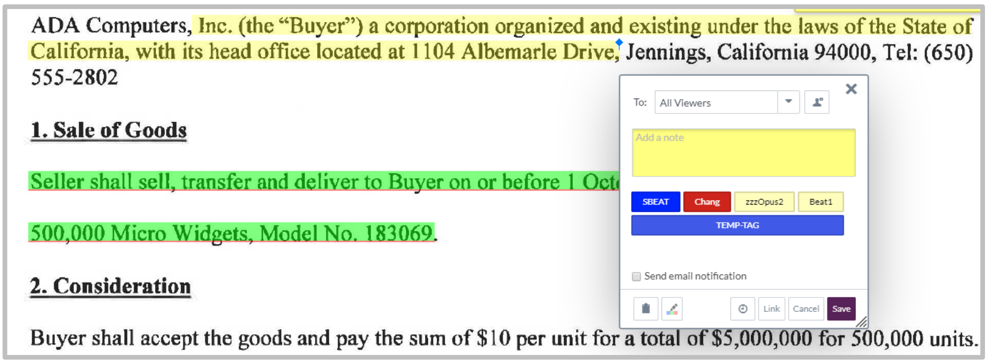


NOTES

Creating notes/annotations is simple and straightforward in Opus 2. The User can write a note in the notepad as they would on a Post-it Note, and share them with selected case team members, or with all members of the workspace.

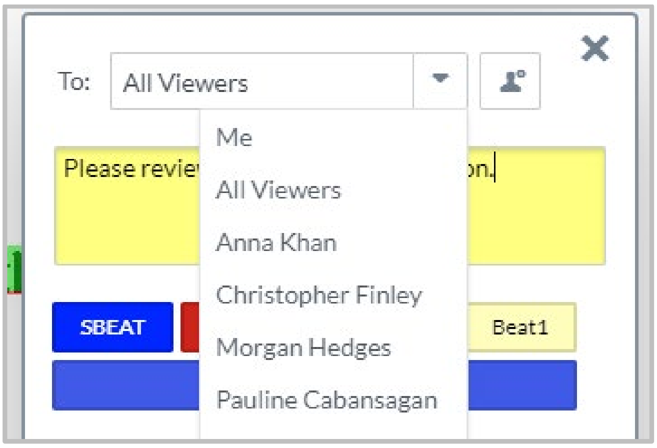
Annotating Text in Opus 2

Simply **click and drag** over any section of text in a document or transcript, and the annotation dialog box will appear. Type in the **desired text** in the Note dialog box, and/or select any **Note Tags** that apply to the annotation, which will appear as colored rectangular boxes with the Note Tag name.



Set Viewing Permission for Notes

The User can customize viewing permissions of their notes by **clicking** on the drop-down menu at the top of the annotation dialog box, and choosing from the available options:

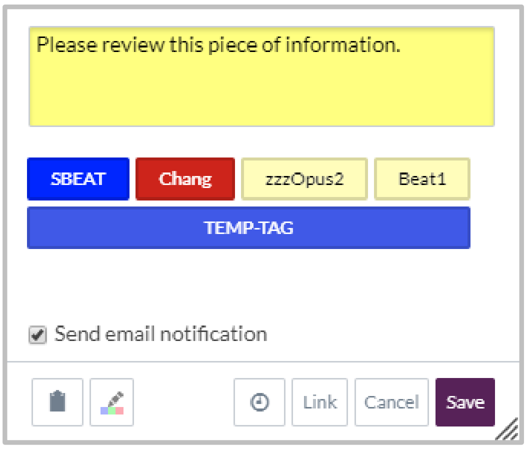


- **Me** – the User's note will remain private and is visible only to them.
- **All Viewers -** share the note with everyone who has access to the workspace.
- **Groups -** configure groups of multiple Users with whom to share notes; for instance, Counsel Team / Client Team (please contact **Admin** to set these up).
- **Individuals -** choose an individual User with whom to share a note. If the User wants to add more than one other User, click on the icon button in the top right corner of the annotation dialogue box.

The User can set the **default setting** for Notes via the **Account** page (which can be accessed by clicking on the **User's name** on the top right of the screen).

Share Notes via Email

Email important notes by clicking the **'Send email notification' checkbox**. This will send an automated email to the relevant User(s) containing a link to the new annotation. **Recipients must first be logged into Opus 2 to open the emailed link.**

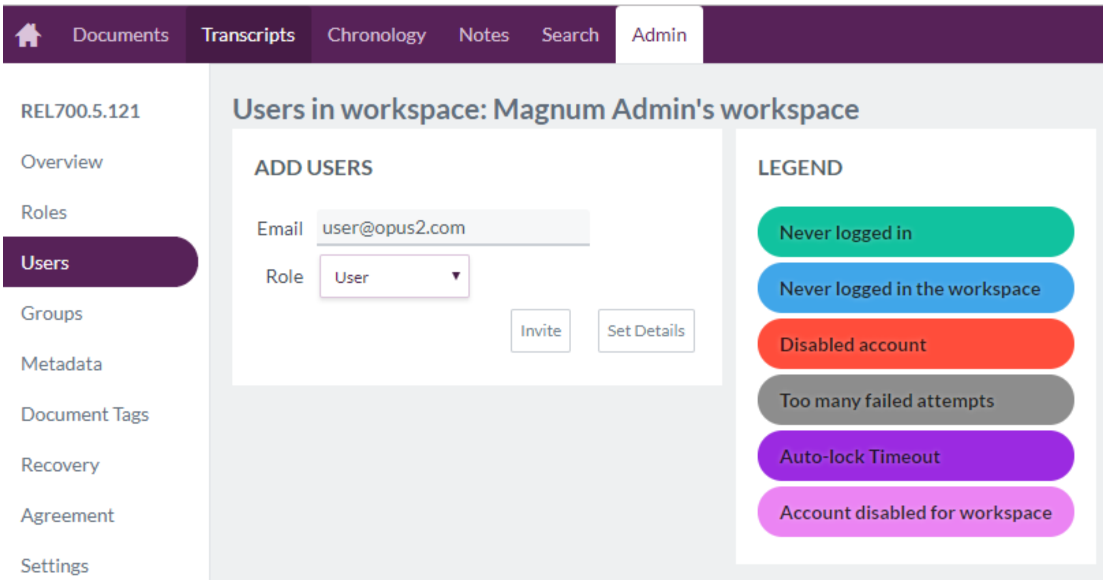


Adding Workspace Users (For Admin Users Only)

Adding Users in the Workspace Admin Tab

Go to the workspace **Admin** Tab > **Users** page.

In the **Add Users box,** enter the email address for the user and select their role.



For a detailed list of the capabilities assigned to each Role, check the **Admin > Roles** page.

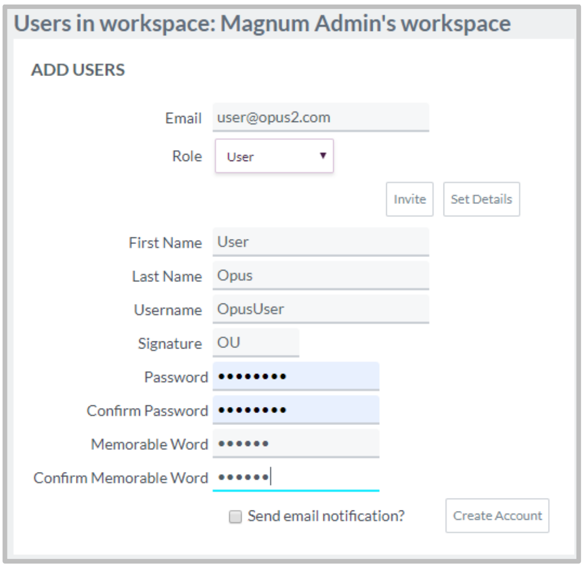
Set Details

Use the **Set Details** option when…

1. Repeated attempts to send a user their registration link do not work, and they are not able to set up their own account credentials, or

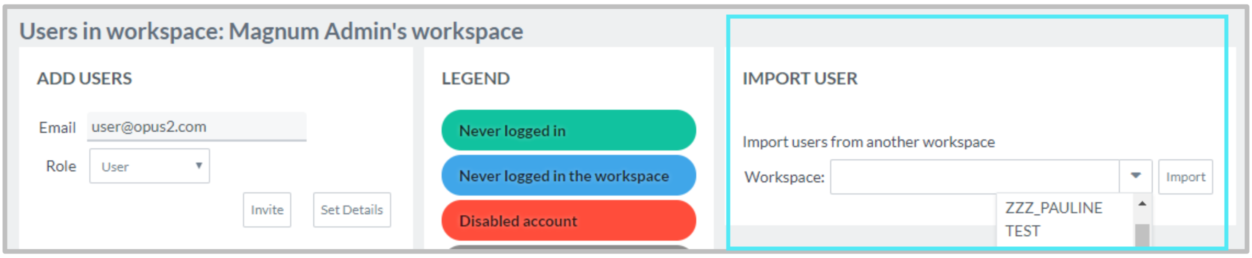
2. Workspace or System Admins prefer to have more control over the credentials of workspace users and would like to set these up for them without needing the usual registration process.

Click on **Set Details** in the Add Users dialog, and fill in the necessary information.

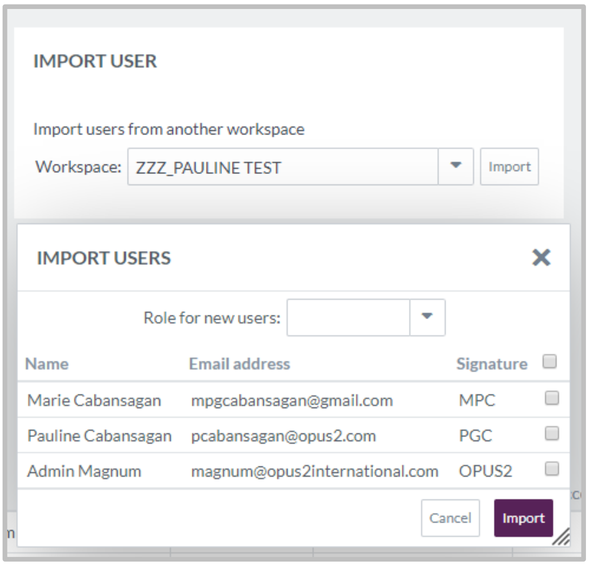


Import Users From Another Workspace

Workspace/System Admins can also use the IMPORT USER option to bring in existing users from another workspace within the same server.



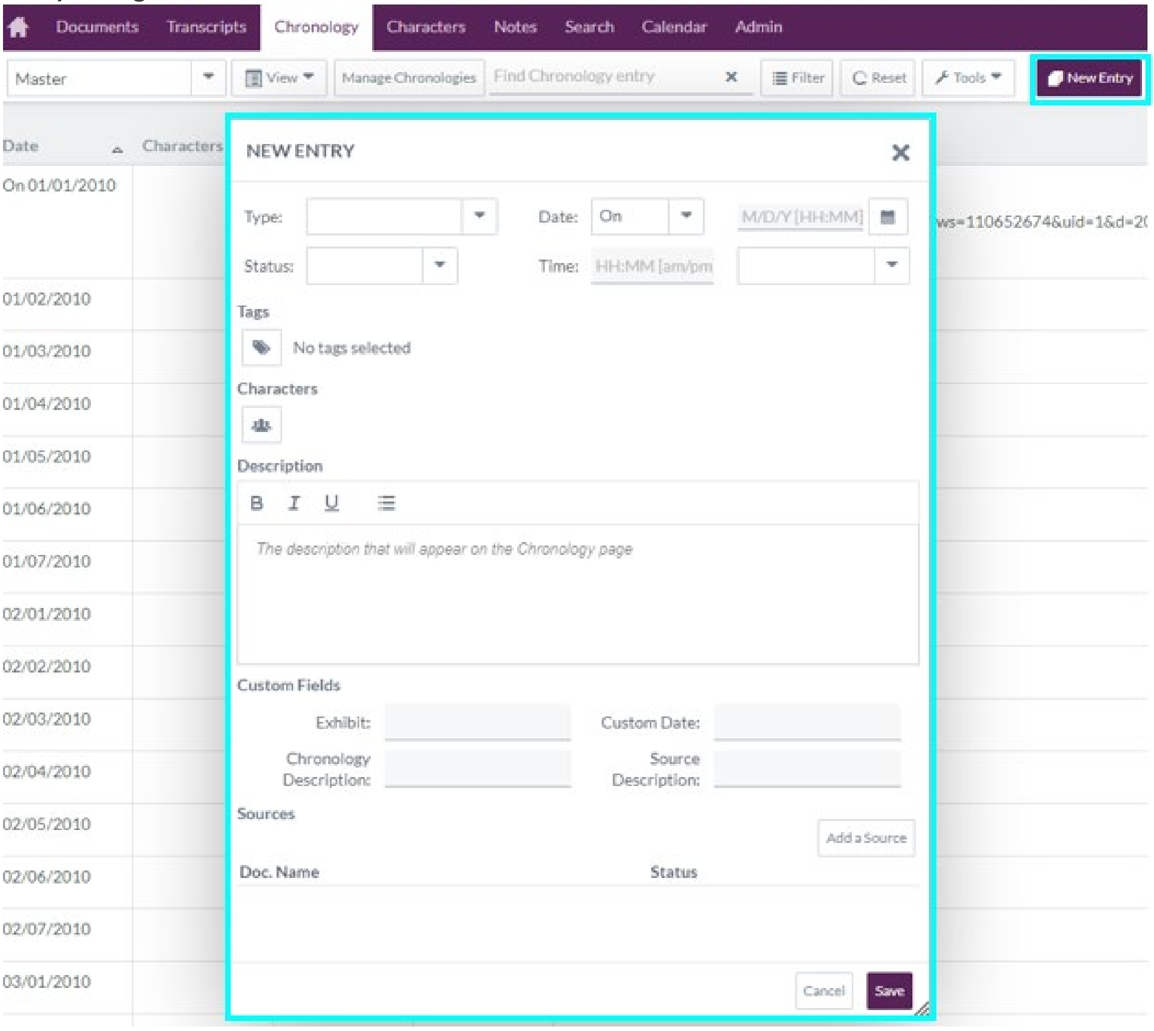
In the **Import User** dialog, select the name of the desired workspace from the drop-down list. The Import Users dialog will pop up with a list of users from the selected workspace. Click the checkbox(s) next to the names of the users you would like to include in the import, and then click **IMPORT.**



CHRONOLOGY

Adding New Chronology Entries

1. In the **Chronology tab,** click on **New Entry** in the menu bar on the top of the screen to access the **New Entry dialog box.**

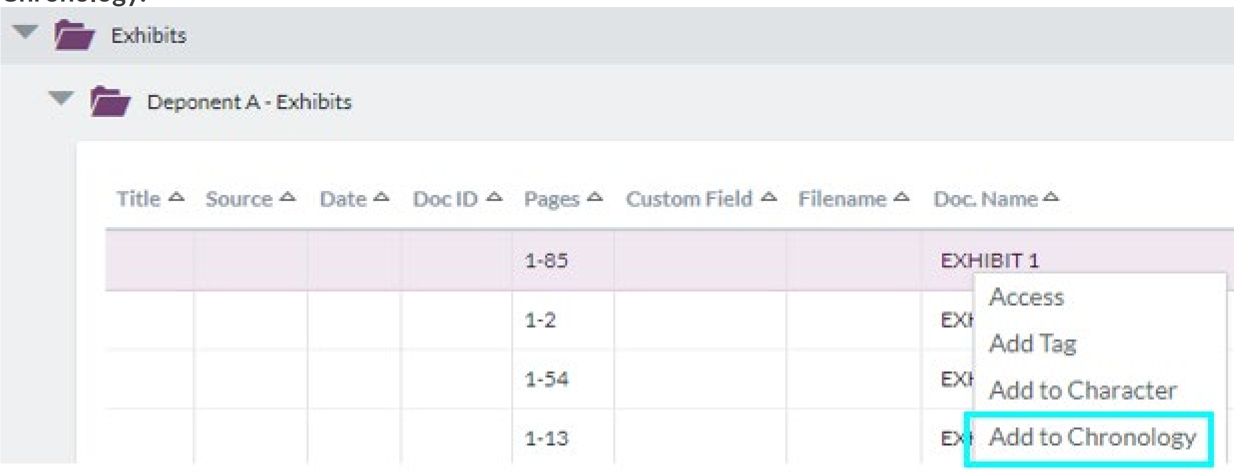


2. Add relevant information about the item, apply tags and link to supporting documents in the **New Entry** dialog box.
   1. **Type**: Drop-down menu includes default types (**Fact**, **Meeting**, **Event**, **Letter**, **Email** and **None**) & any custom types.
   2. **Status:** Drop-down menu includes **Disputed**, **Undisputed** and **Not Set**. If the User chooses **Disputed**, the line will RED highlight. If User chooses **Undisputed**, the line will GREEN highlight.
   3. **Date:** Drop-down menu allows Users to specify Date status: **On**, **Before**, **After**, **Range** and **None**.
   4. **Time:** Drop-down menu includes multiple time zones.
   5. **Tags:** Users can apply tag(s) to the entry.
   6. **Description:** Users can apply a description of the entry, analysis and work product. **NOTE:** The Description field now accommodates **rich text formatting**, including bullets and bold/italic/underlined text. Users can maximize customization of text in this field.

7. **Add a Source**: Users can link a source document(s) to the entry. The **Sources** column appears by default in the Chronology tab and displays the source document(s) linked to an entry.

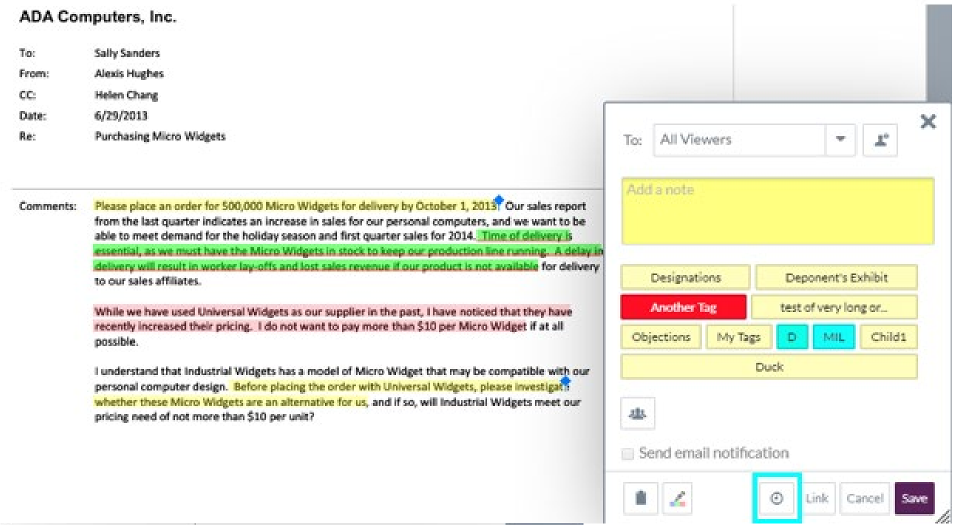
Add Documents to Chronology from Documents Tab

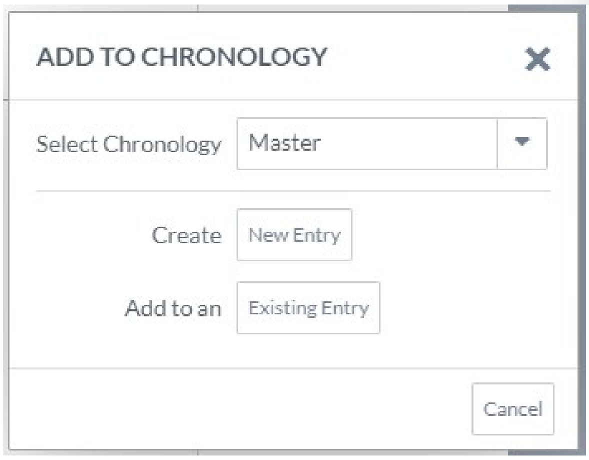
3. Additionally, documents can be added to a Chronology from the **Documents tab.** Within the Documents tab columns view, **right-click** on a document or set of documents and choose **Add To Chronology.**



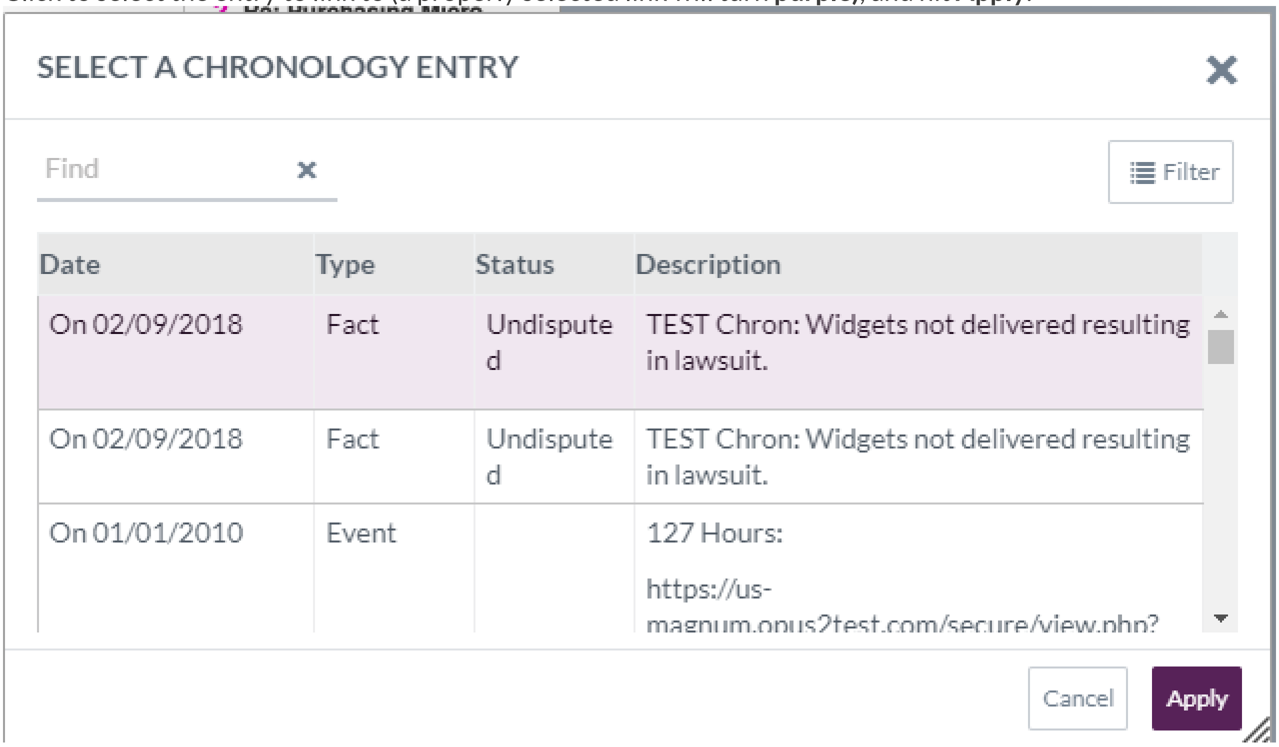
4. The User has the option to **Select Chronology** (if multiple chronologies exist), and either add the selected document(s) as **a new entry** or to **an existing entry.**

5. **To link a source document to a Chronology:** In the Document view (within the document), after highlighting the desired text, click on the **clock icon** to add a link to this page to a Chronology.

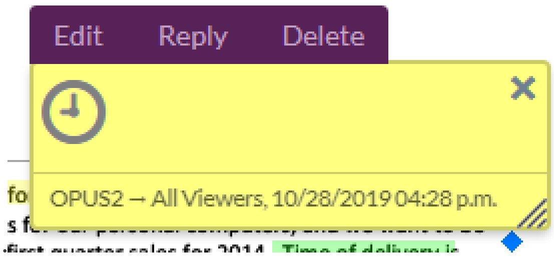




6. Click to select the entry to link to (a properly selected link will turn **purple)**, and hit **Apply**.



7. Once the Chronology entry is saved to the text, the clock icon will display on the note to indicate it is associated with a Chronology entry



OPTIONS FOR CHRONOLOGY ENTRIES:

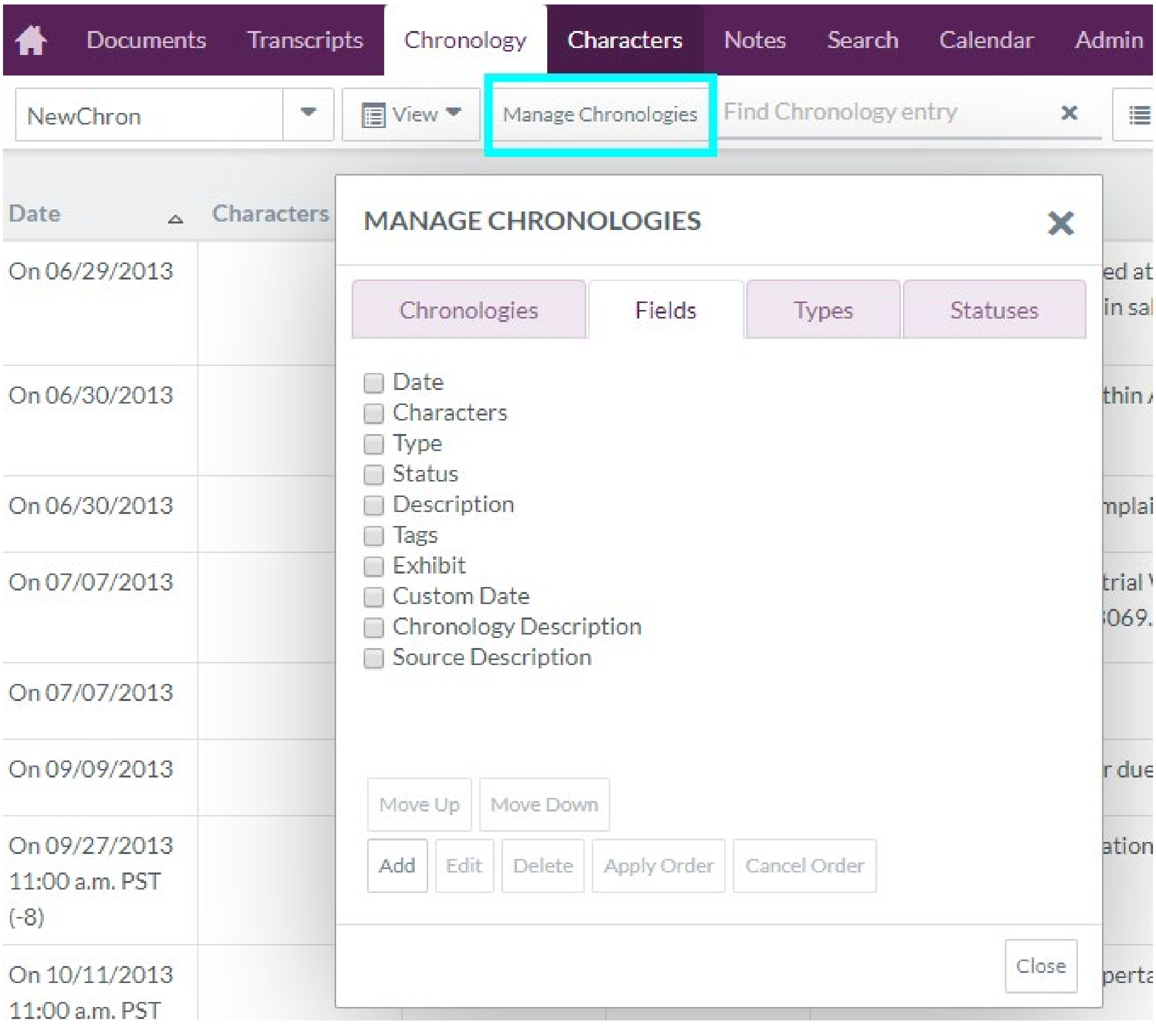
- **Create a New Entry:** If added as a **New Entry,** fill out the relevant sections in the dialog box.
- **Select an Existing Entry:** If added as an **Existing Entry**, click and blue **highlight** the entry in the **Select A Chronology Entry** dialog box.

Click **Apply**¸ and those documents will be added as **Sources** in the Chronology tab for that entry.

Manage Chronologies

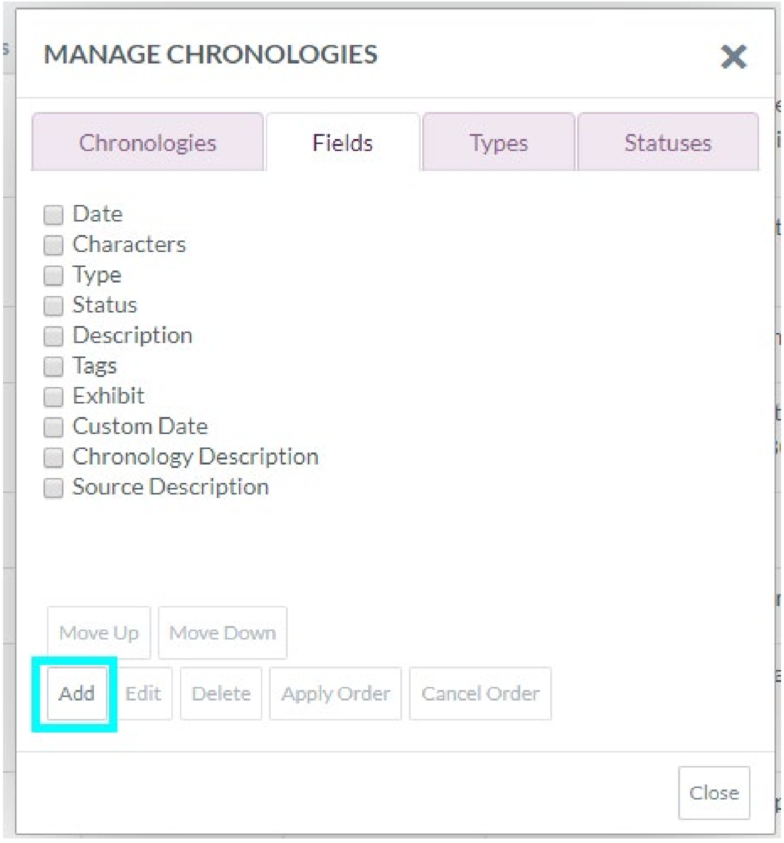
Click on **Manage Chronologies** and select any of tabs in order to do the following:

- **Add** a new chronology or custom field, type or status.
- **Edit** to edit the name or any relevant settings of a chronology or custom field, type or status.
- **Delete** to delete an existing chronology, field, type or status.
- **Move Up**
- **Move Down**
- **Apply Order**
- **Cancel Order**

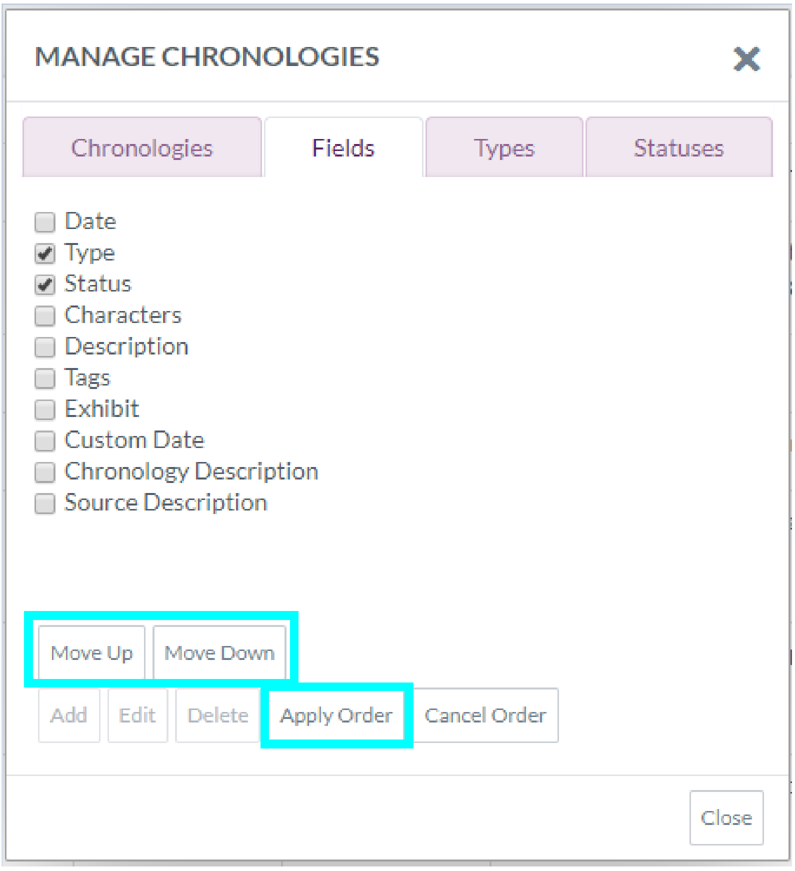


Custom Fields

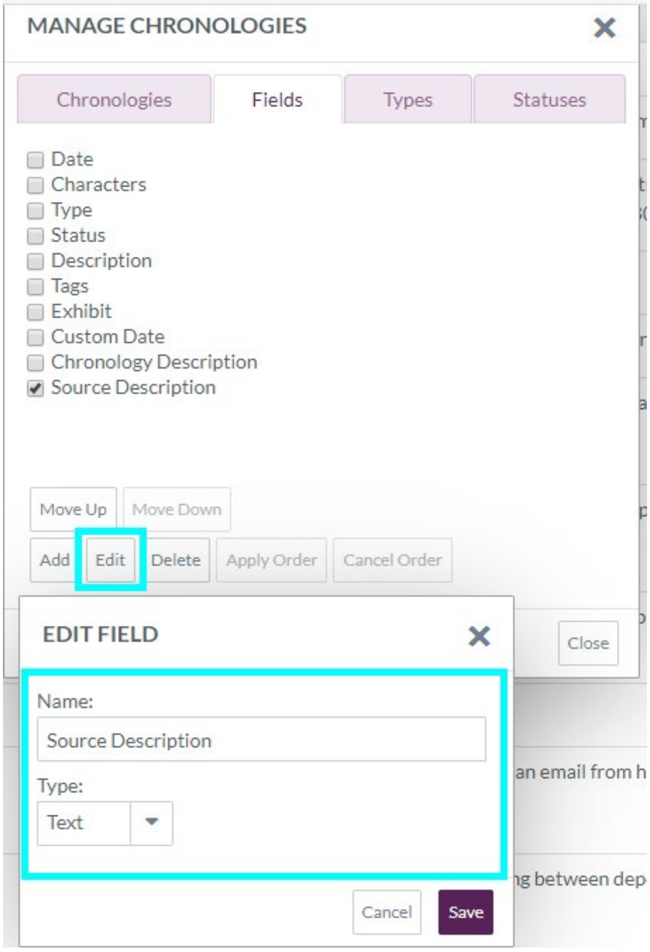
ADD: Create up to 20 custom fields in a Chronology and reorder all fields as desired. Click on **Add** to create a new field and set the appropriate field type:



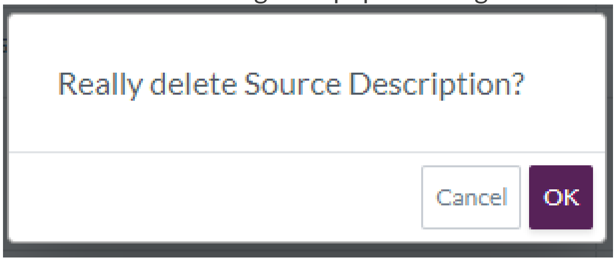
REORDER: Click on the **checkboxes** next to the fields that need reordering. Use the **Move Up** and **Move Down** controls to arrange the sequence of fields. Click on **Apply Order** to finalize changes. Click **Cancel Order** to undo.



EDIT FIELD: Click on the checkbox to select a field, then on **Edit** to revise the field name and type. Click **Save** to finalize changes.

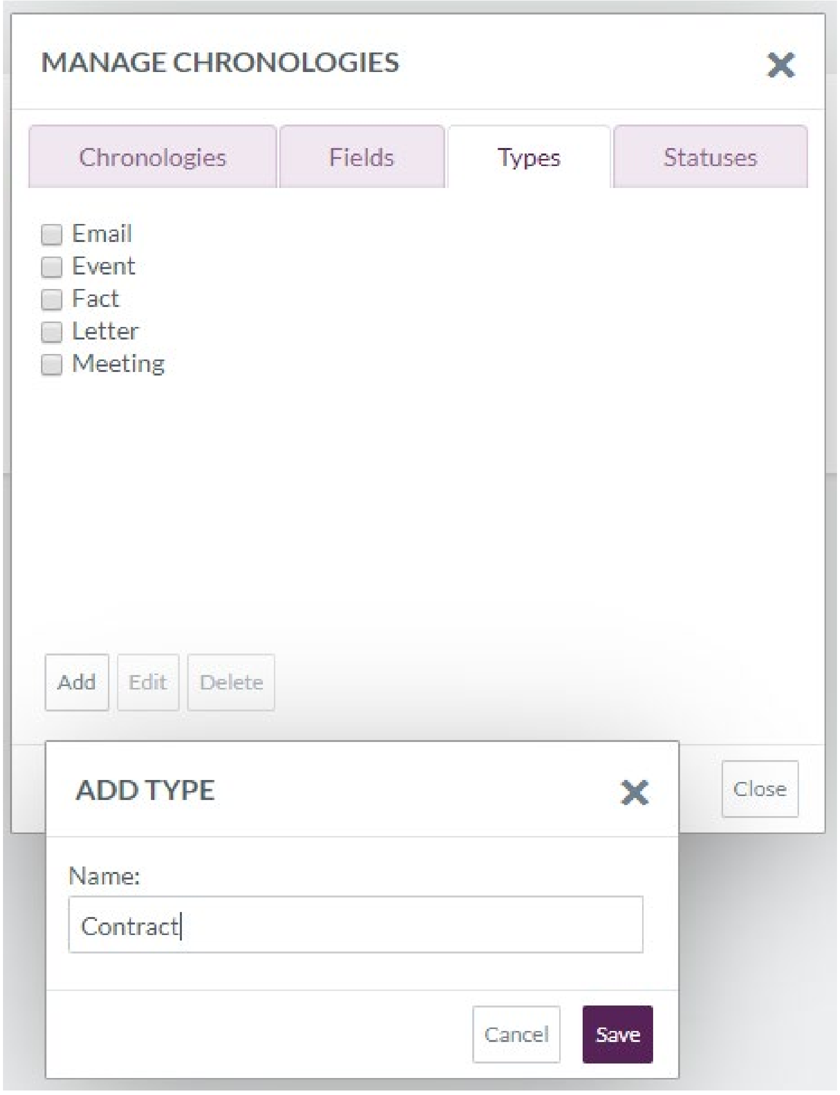


DELETE FIELD: Click on the checkbox to select a field, then on **Delete** to remove the field from the Chronology. A confirmation message will pop us asking the user to confirm the deletion; click on **OK** to finalize.



Custom Types

Current default types in the **Chronology** tab are **Email, Event**, **Fact**, **Meeting**, **Letter** and **None**. Users can supplement the default types based on the needs of the case. Click on the**Types** tab in the Manage Chronologies dialog and select **Add** to create a new custom type.

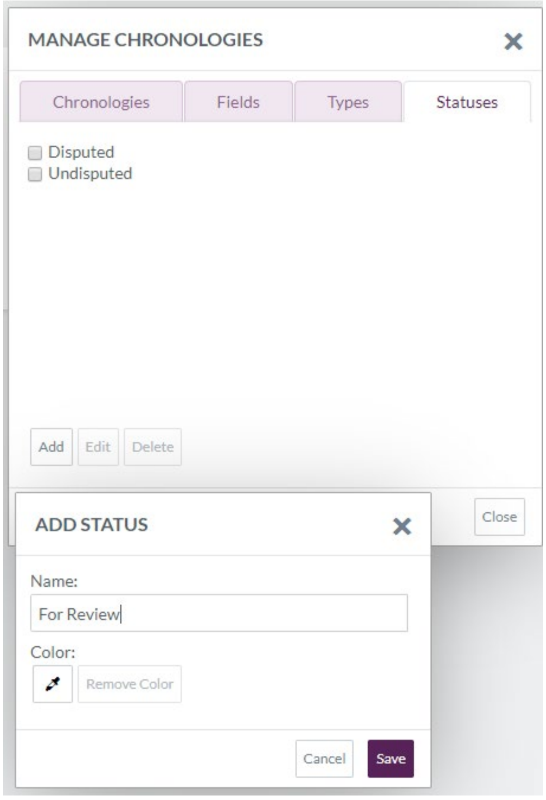


Enter the name of the new Type and hit **Save** to finalize changes.

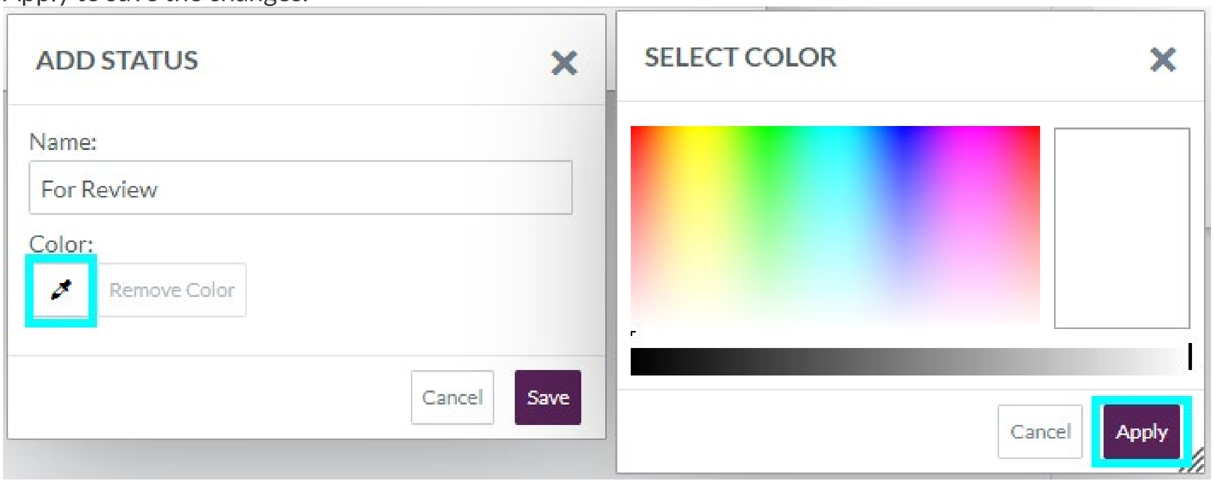
Once the new type has been created, it will appear in the **Type** tab options.

Custom Statuses

New statuses for Chronology entries can be created in the Statuses tab of Manage Chronologies. Click on Add and type in the desired name for the new Status.



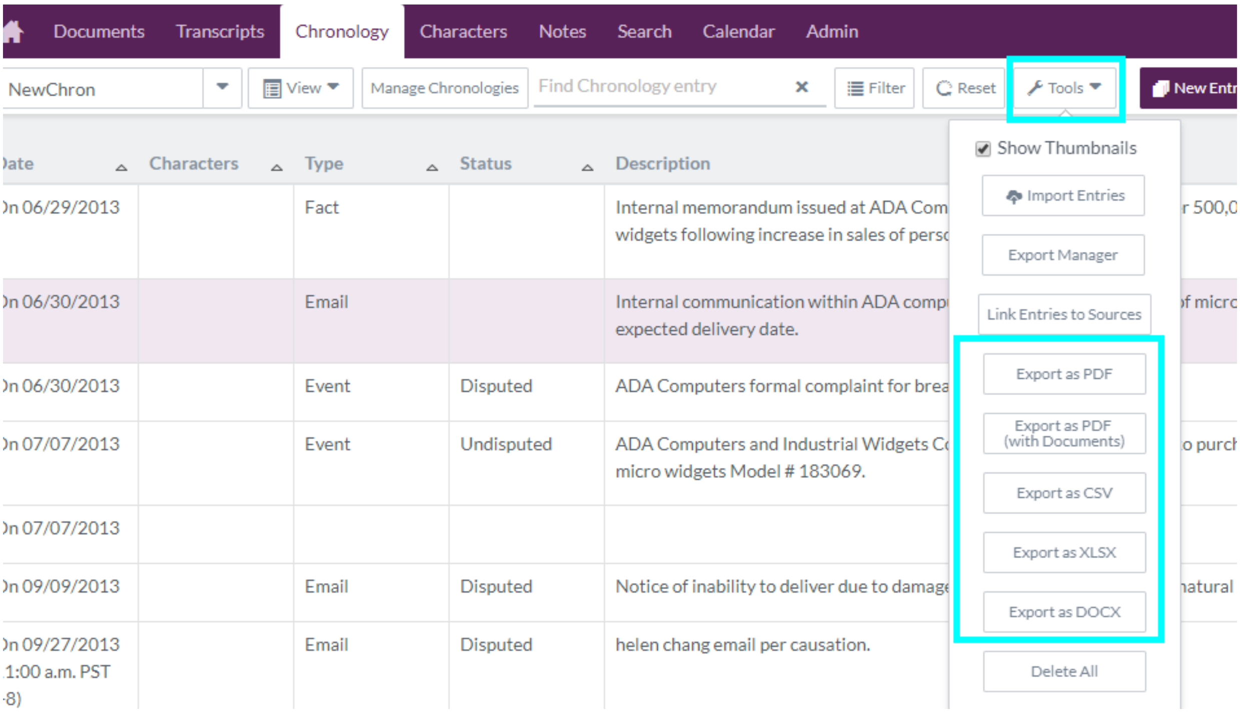
Assign a color to the status by clicking on the Color icon and selecting the desired color from the palette. Hit Apply to save the changes.



To remove an assigned color, hit “Remove Color” in the New Status/Edit Status dialogue. Hit Save to finalize any changes. To **EDIT or DELETE** a status, click on the checkbox to select the status, and then hit Edit or Delete. Hit Save to finalize any changes.

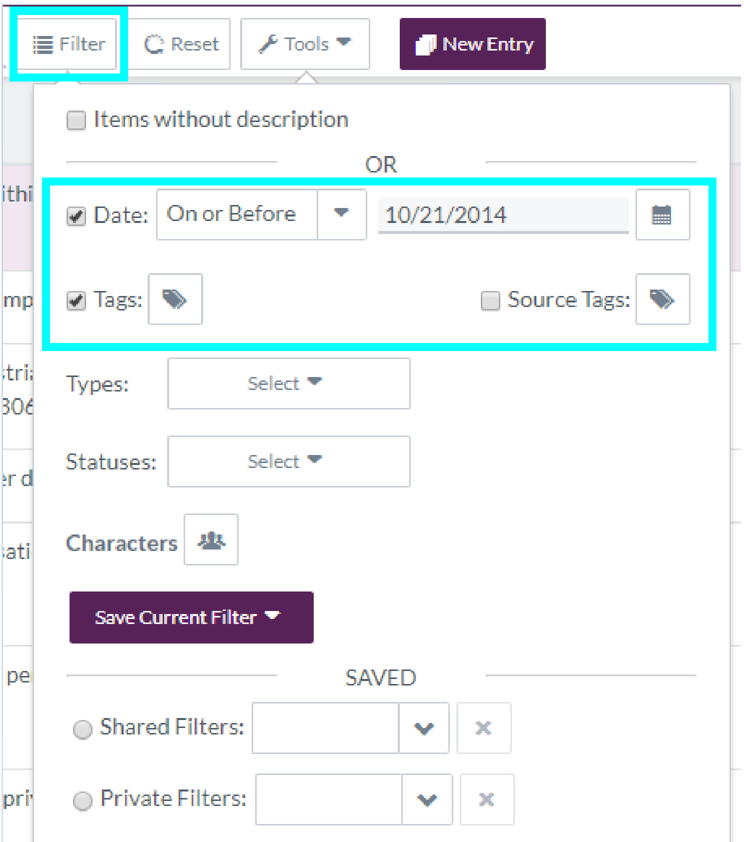
Export Chronology Report

1. In the **Chronology** tab, Click on **Tools** in the menu bar at the top right of the screen.
2. Users have the option to export the entries into **PDF, CSV, XLSX and DOCX reports** for a presentation, a hard copy printout, or further manipulation outside of Opus 2. Select the desired file format from the drop-down menu.



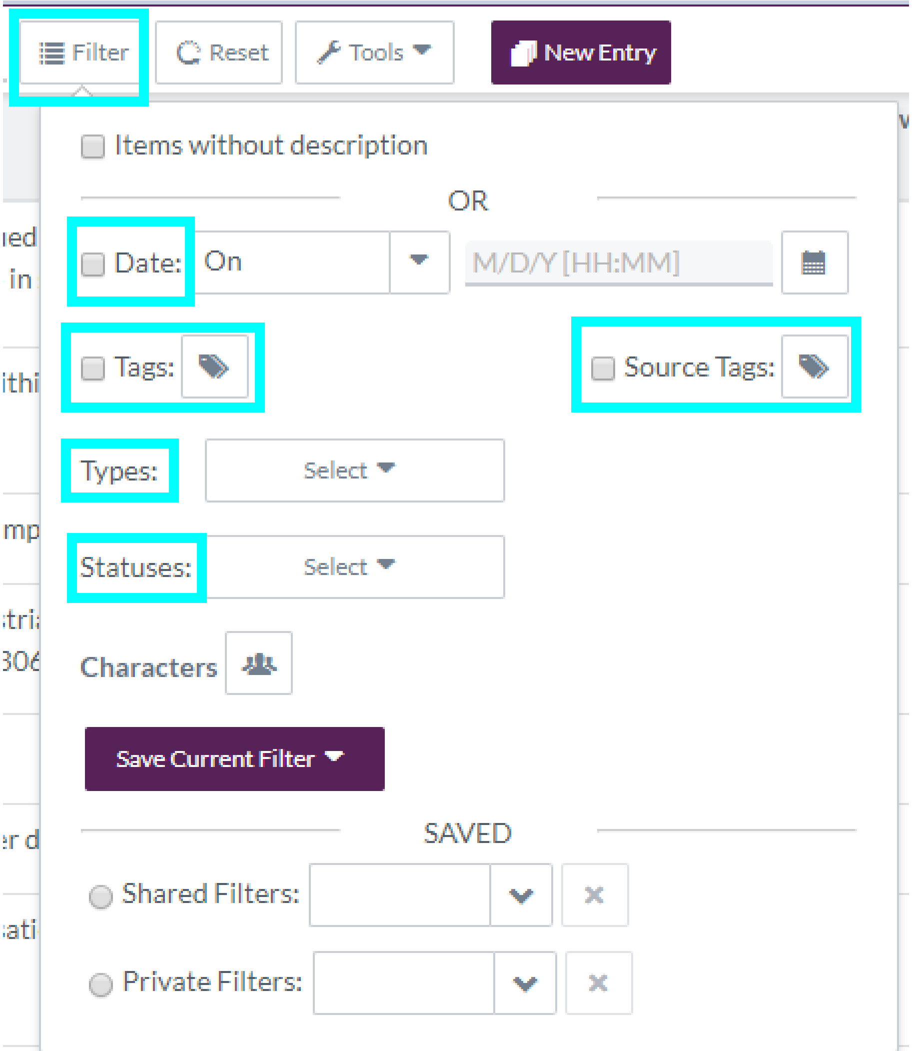
3. The **Export as PDF with Documents** option will export the entire Chronology report, including any linked documents.

4. Applying a filter prior to the export will customize the export (further discussed in the **Chronology Filters article**).



Chronology Filters

FILTERS DIALOG



The User can filter against the entries in the Chronology tab. Click on **Filter** in the menu bar at the top of the screen and choose the following options:

- <u>Items without description:</u> New entries without descriptions.
- <u>Date:</u> Choose between the date before, after and range.
- <u>Types:</u> Choose between the types of entries (Fact, Meeting, etc.).
- <u>Status:</u> Choose between Disputed, Undisputed, Any (both), Not Set.
- <u>Tags:</u> Choose the tags of the documents in the entries the User wants to view.

Users have the option to **Save** the filter as a **Shared Filter** (viewable to everyone who can access the **Chronology** tab), or as a **Private Filter** (viewable only to the User who created it).

Characters: Enhanced Witness Management

With the Opus 2 7.0 release, we are pleased to introduce the new Characters feature, which enhances the platform's witness management capabilities. Analyze and organize case information with greater flexibility to derive smarter insights and enjoy access to new ways of manipulating and organizing data.

Overview

With Characters, you'll be able to:

- Create a centralized view of witnesses and key persons relevant to the case, along with related information and documents;
- Prepare witness binders in less time. With your data in one location, you can find data and export with ease;
- Quickly and easily capture and review relationships between your witness and key evidence with multi-directional linking;
- Tailor the Characters feature to suit your individual cases. Add, remove and modify any information field and customize the layout exactly how you want it; and
- Use advanced views such as worksheets and cards that offer different lenses to view your case information. We'll be adding more views in future releases to provide even greater flexibility.

For a full demonstration on how to use this tool, please contact your Opus 2 Technical Account Manager.

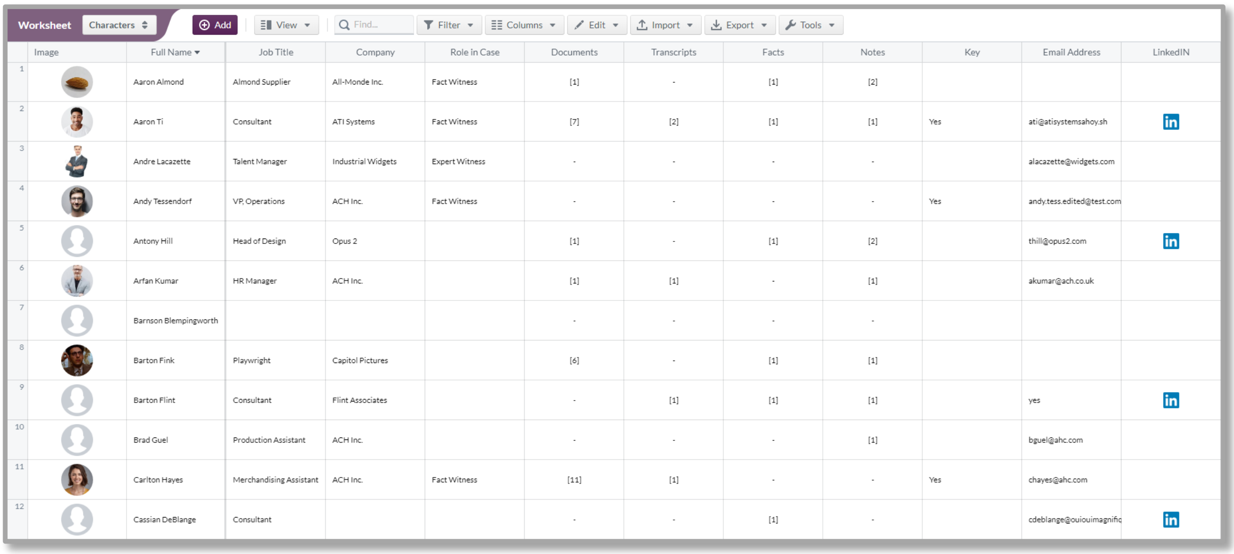
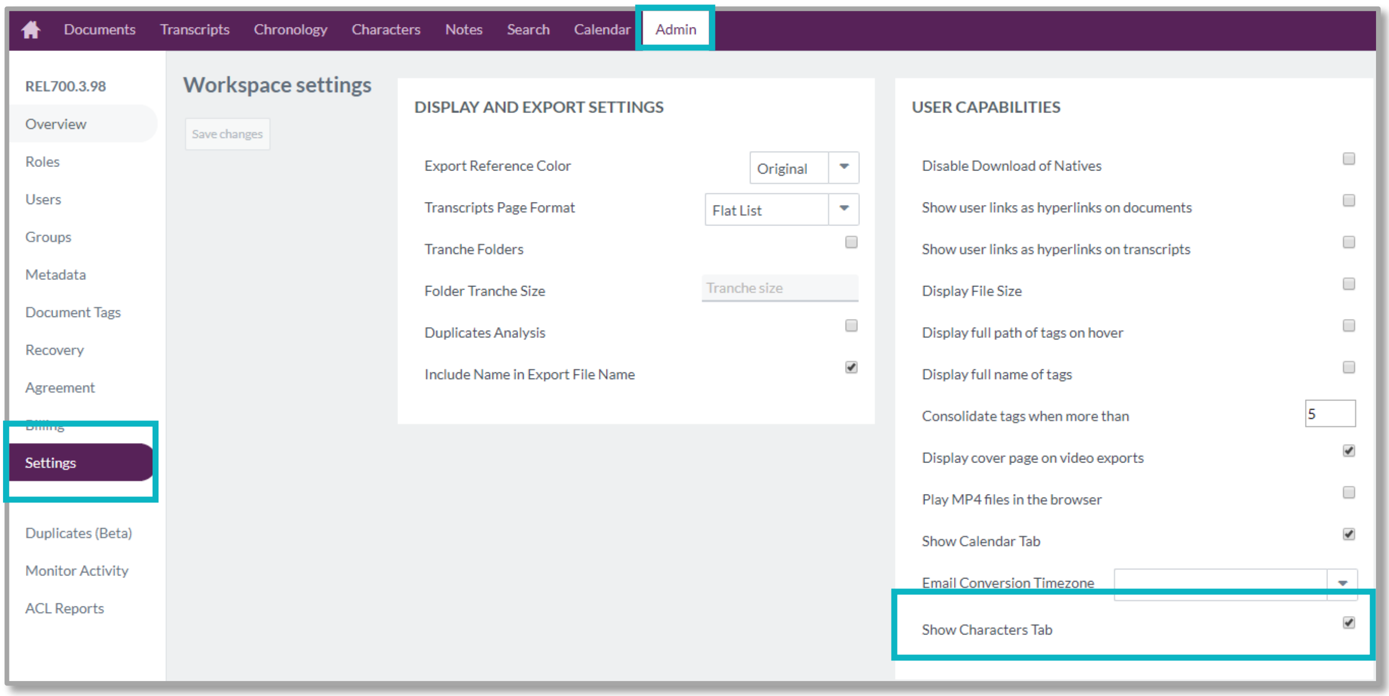


	Image	Full Name	Job Title	Company	Role in Case	Documents	Transcripts	Facts	Notes	Key	Email Address	LinkedIN
1		Aaron Almond	Almond Supplier	All-Monde Inc.	Fact Witness	[1]	-	[1]	[2]			
2		Aaron Ti	Consultant	ATI Systems	Fact Witness	[7]	[2]	[1]	[1]	Yes	ati@atisystemsahoy.sh	
3		Andre Lacazette	Talent Manager	Industrial Widgets	Expert Witness	-	-	-	-		alacazette@widgets.com	
4		Andy Tessendorf	VP, Operations	ACH Inc.	Fact Witness	-	-	-	-	Yes	andy.tess.edited@test.com	
5		Antony Hill	Head of Design	Opus 2		[1]	-	[1]	[2]		thill@opus2.com	
6		Arfan Kumar	HR Manager	ACH Inc.		[1]	[1]	-	[1]		akumar@ach.co.uk	
7		Barnson Blempingworth				-	-	-	-			
8		Barton Fink	Playwright	Capitol Pictures		[6]	-	[1]	[1]			
9		Barton Flint	Consultant	Flint Associates		-	[1]	[1]	[1]		yes	
10		Brad Guel	Production Assistant	ACH Inc.		-	-	-	[1]		bguel@ahc.com	
11		Carlton Hayes	Merchandising Assistant	ACH Inc.	Fact Witness	[11]	[1]	-	-	Yes	chayes@ahc.com	
12		Cassian DeBlange	Consultant			-	-	[1]	-		cdeblange@ouiouimagnific	

Enable the Characters tab on your Workspace (Admin Users)

To make the Characters tab accessible on a workspace, a Workspace Admin or System Admin user will need to turn on the feature from the Admin > Settings page by checking the box next to **Show Characters Tab**.

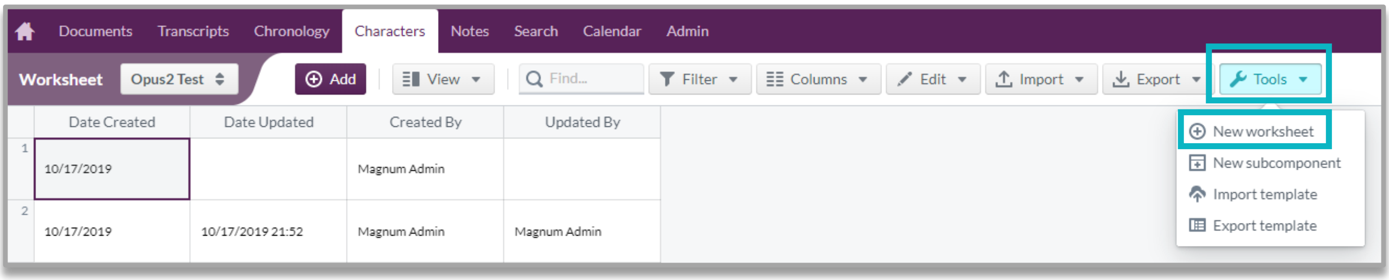


If you do not have the access to do this or would like further information, please contact your firm's Workspace or System Administrator(s), or email support-us@opus2.com.

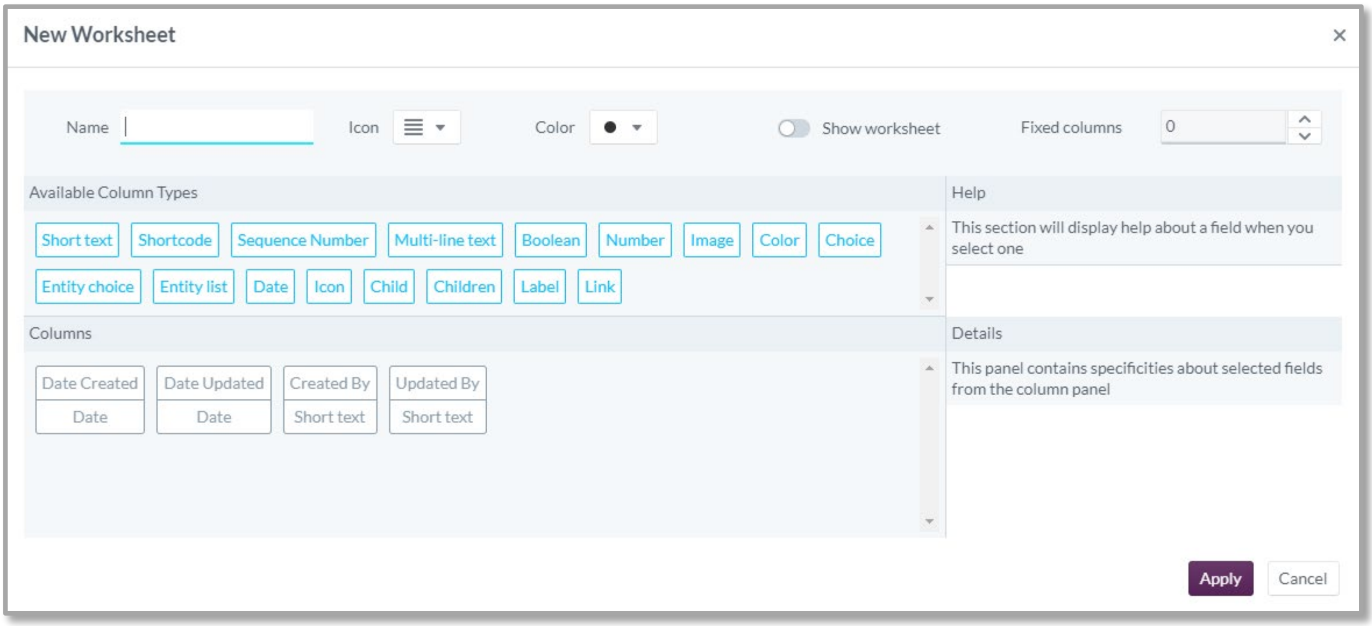
Getting Started: Create a New Worksheet

Once you have access to the Characters tab, you're ready to set up Worksheets to organize your data.

In the **Tools** drop-down, select the **New Worksheet** option.

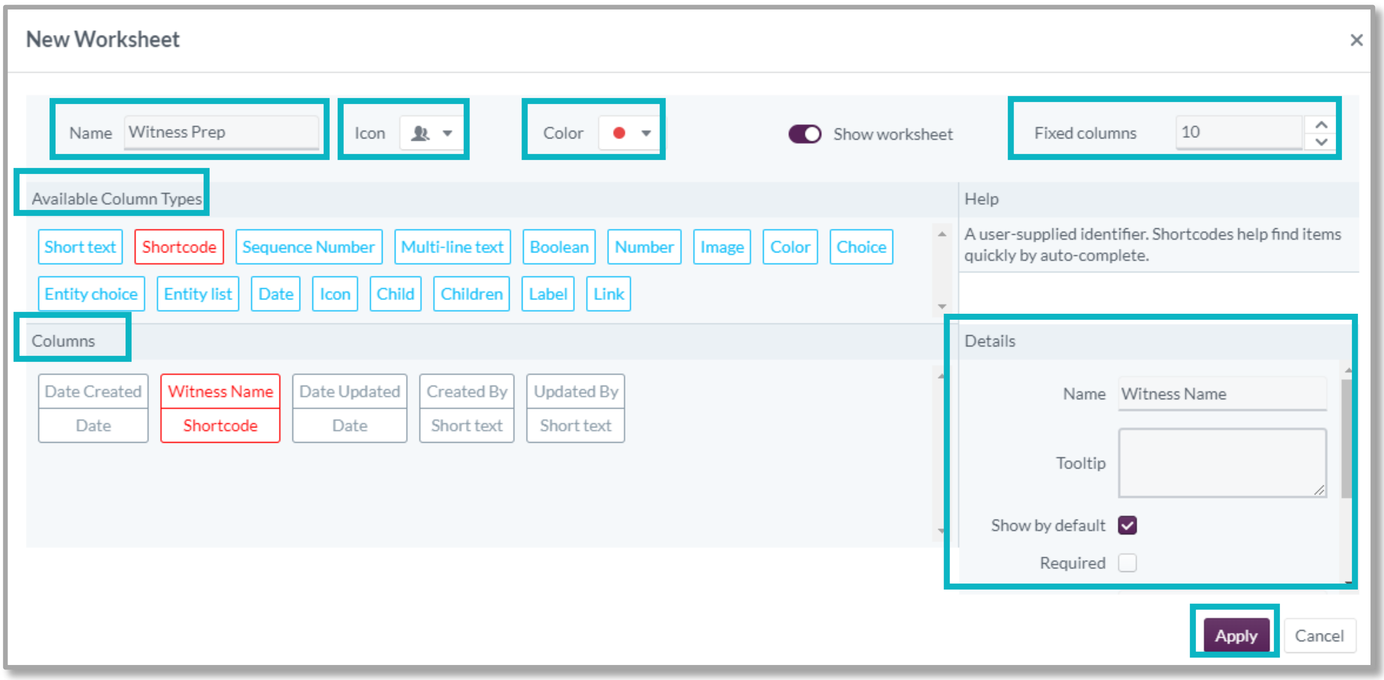


This will trigger the **New Worksheet** dialog:



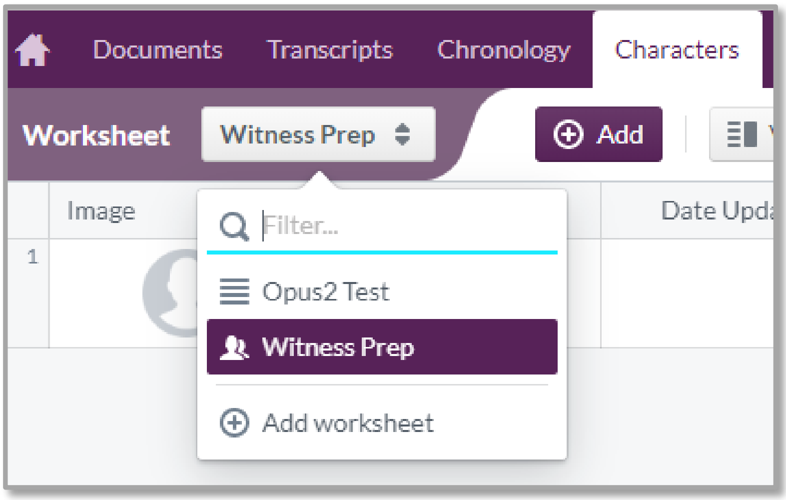
Within this dialog, you can:

1. **Type in the name** for the new worksheet.
2. **Select an Icon** to identify to represent the worksheet.
3. Select a **color**.
4. Set the **number of fixed columns** that will appear each time the worksheet Is loaded.
4. Drag available column types from the Available Column Types section into the Columns section to **create a new field** in your worksheet.
5. **Edit Column details** on the lower right-hand side. From here, rename the column and change its settings.



After all settings and preferences have been set, hit **Apply** to create your new worksheet.

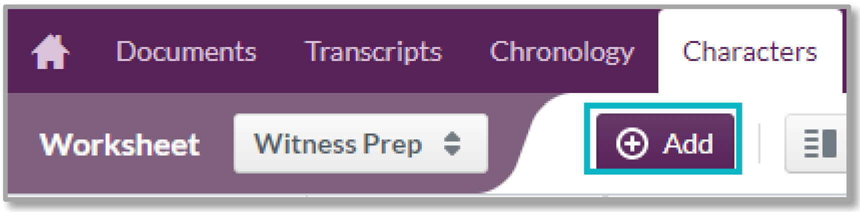
To navigate between two or more worksheets, click on the arrows next to the worksheet name in the upper left-hand corner. Select the desired worksheet name from the list to load another worksheet:



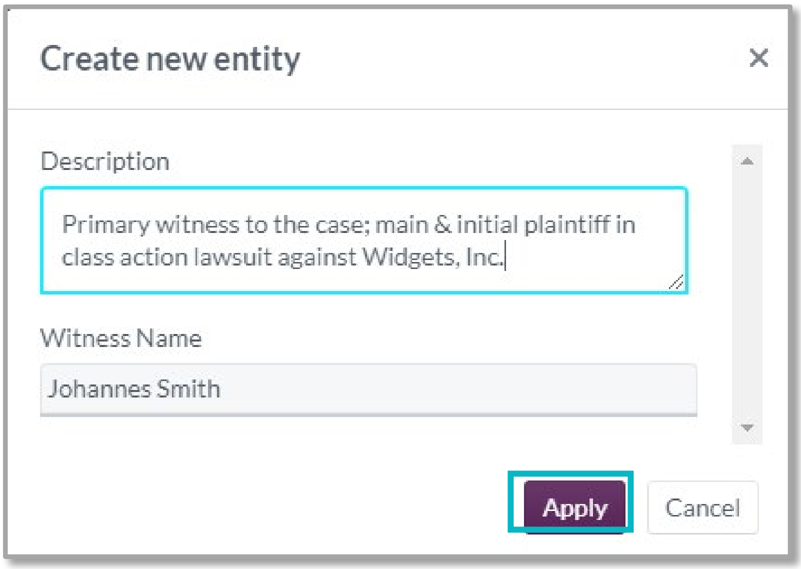
Create A New Entity

Each entity in a worksheet represents a person relevant to the case.

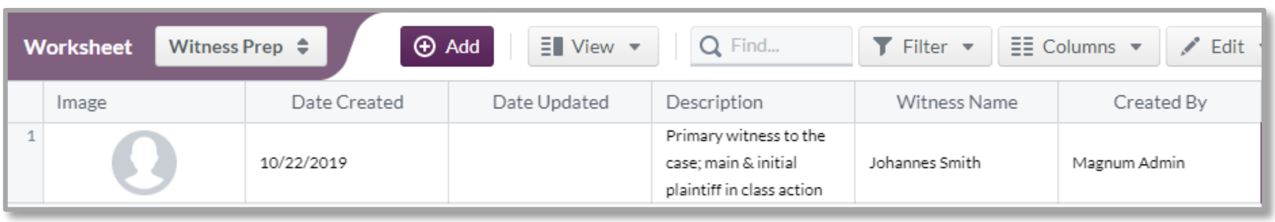
To create a New Entity, click on the purple Add button next to the Worksheet name.



Type in the corresponding details for each field in the **Create New Entity** dialog. Hit **Apply** when finished.



This adds a new Entity to your worksheet.

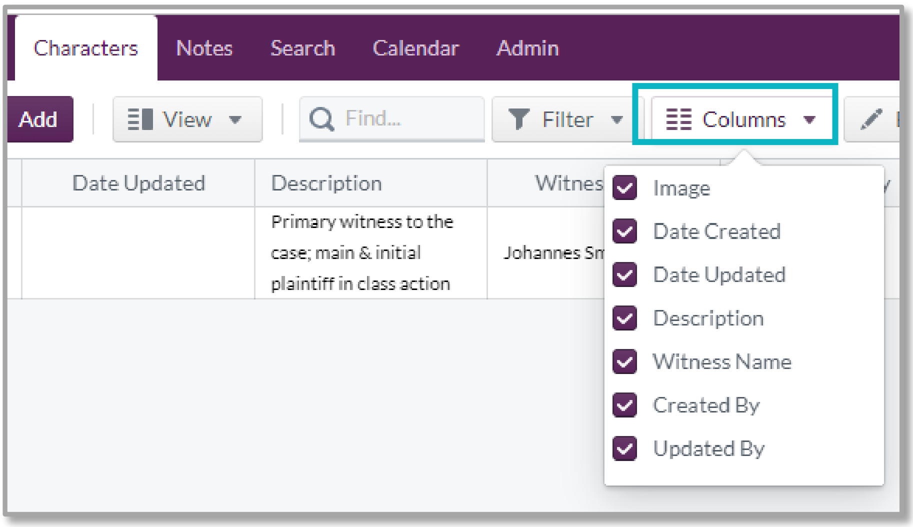


Managing Your Worksheet

Please note that some options may not be available for non-Administrator users. If you need access to a specific option that is not currently available to you, please contact your Workspace or System Administrator, or Opus 2 Support.

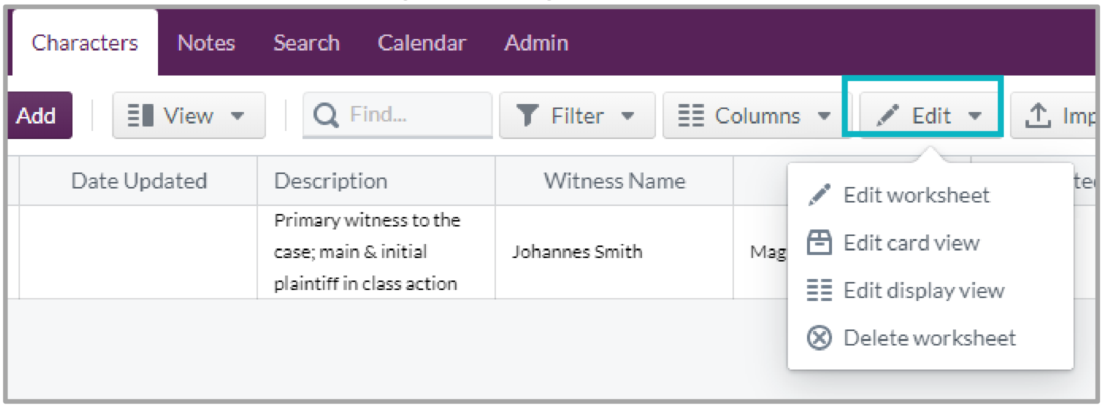
Select Columns for Viewing

Customize your view of the fields that contain data for your witness using the View drop-down. Click the **Columns** button, then check the boxes corresponding to the column names you'd like displayed within your worksheet:

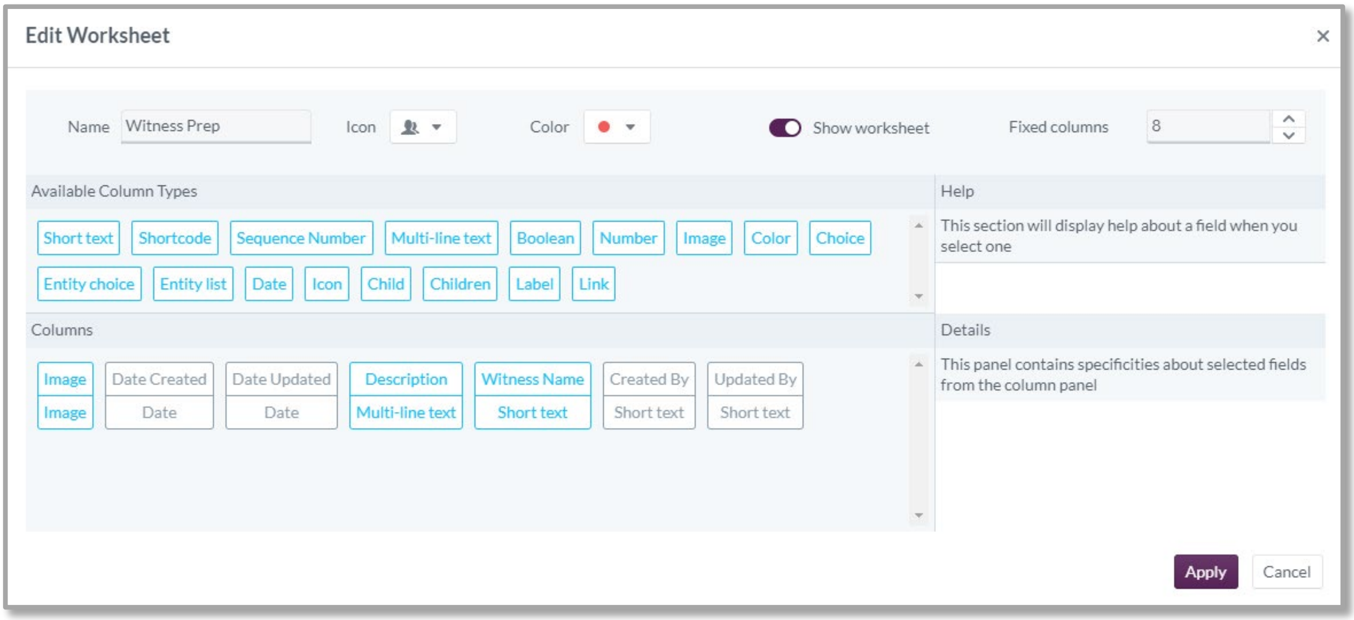


Edit Your Worksheet

The Edit button allows you to change the settings for your worksheet, card view and display.

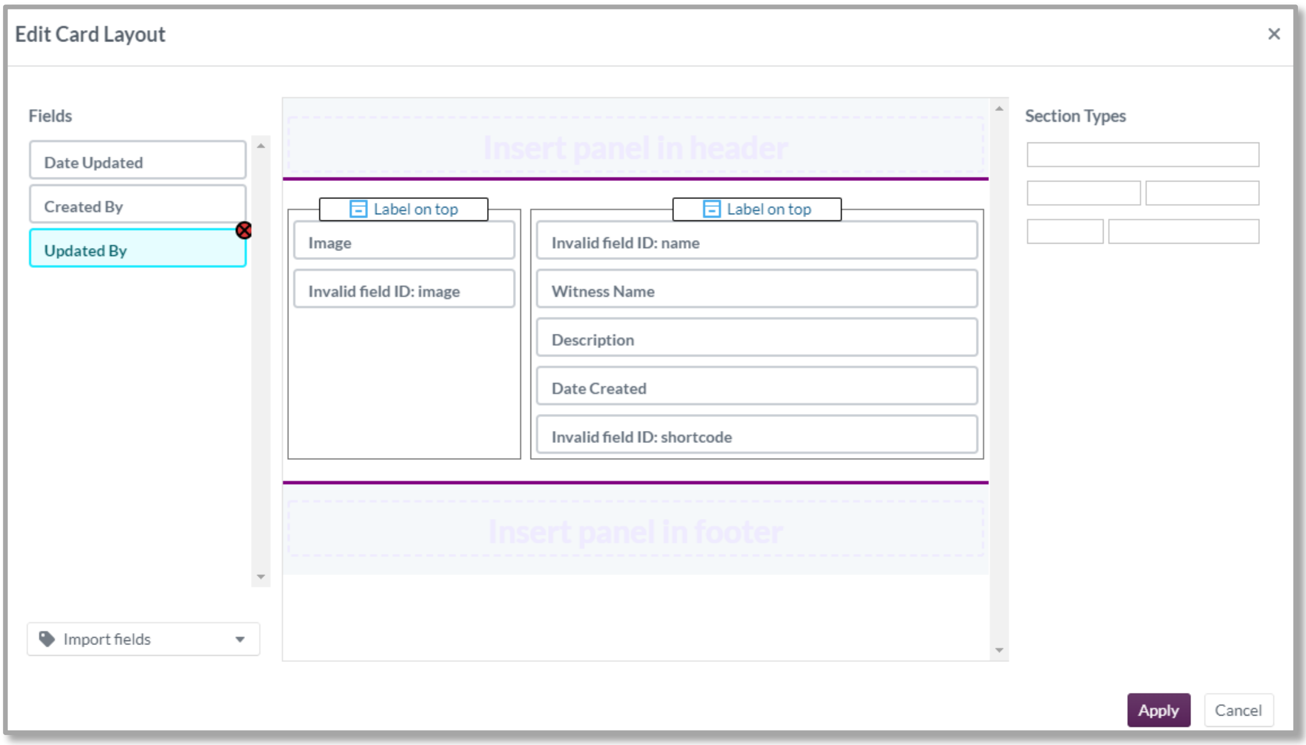


Make changes to your worksheet settings and defaults in the **Edit Worksheet** dialog. See the above **New Worksheet** section for details on the options within this dialog.



Customize Card View Layout

Customize your Card View layout by dragging and dropping fields from the list on the left-hand side onto the layout template in the center. Move the fields up or down in your desired order, and set the position for the label to be on the left, top or none.



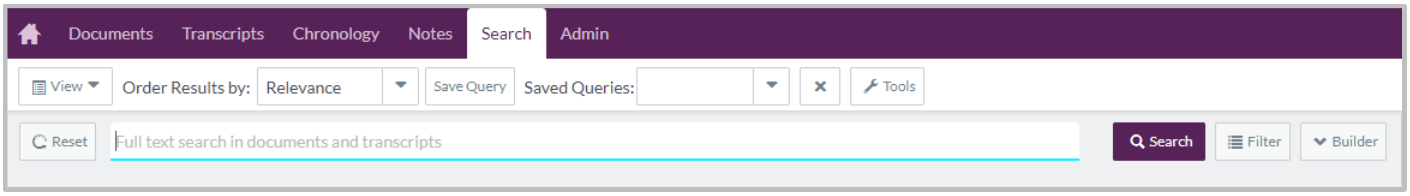
Export Your Worksheet

Export your worksheet into either a CSV- or XLSX-format report using the Export button.

SEARCH

Opus 2 Users can search within documents and transcripts from the **SEARCH tab**. This pulls up **ALL SEARCH HITS** within any and all **OCR'd or SEARCHABLE text** within the workspace. Please note that this **not** include metadata; metadata can be searched from the **FIND** box in the Documents tab.

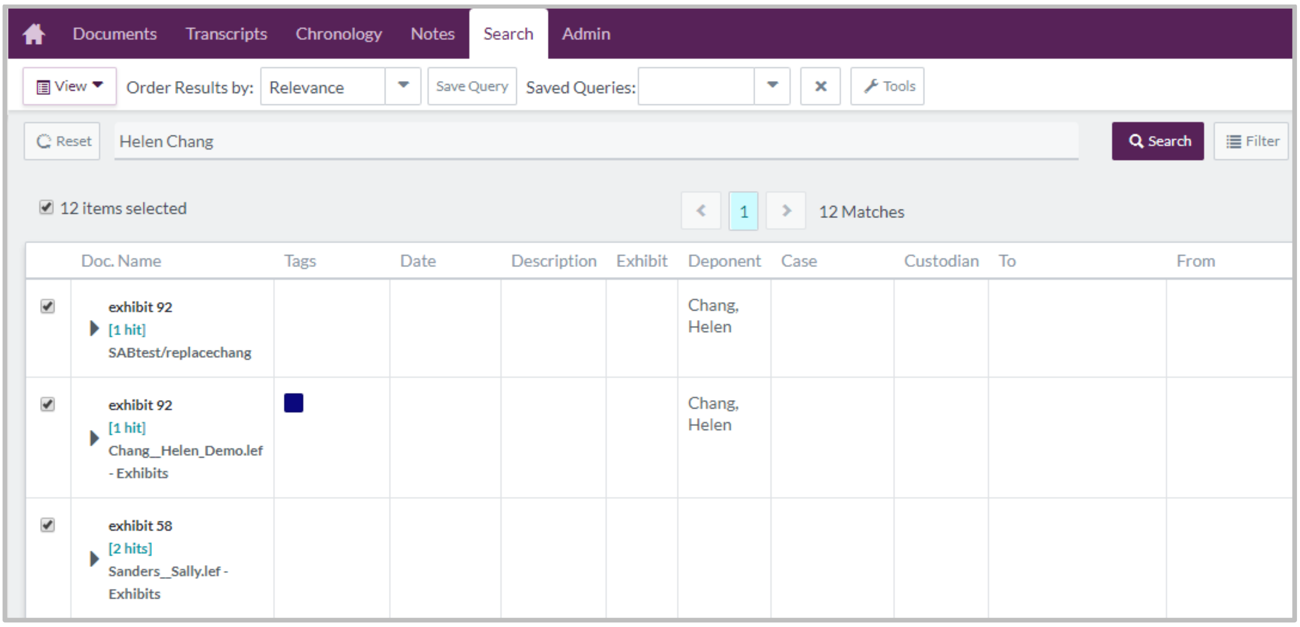
Basic Search



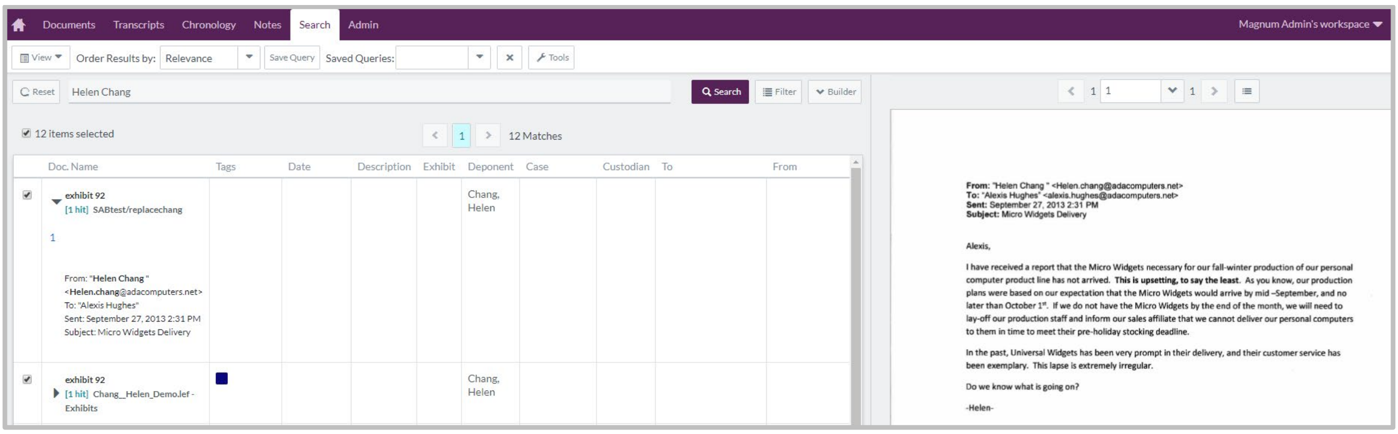
Enter a search term in the query box and results will be displayed below, including the resulting hits' metadata.

(Please contact Admin to customize the set of metadata in the Search view.)

NOTE: The Search tab is set up to accommodate a number of special characters within search terms, including periods, commas, dashes and currency signs.



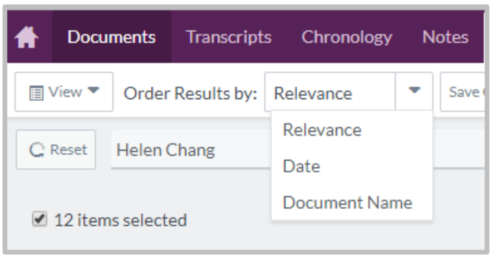
Click on a **search term hit** and the preview window will then display the document or transcript on the right side of the page. Click on the **preview image** to launch the full document in a new tab.



Search Results Sort Options

Opus 2 offers several options for sorting the search results:

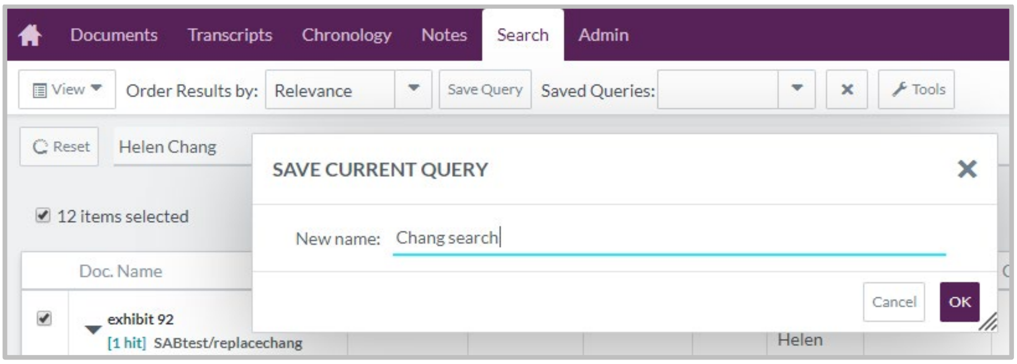
- **Relevance** will sort to display the most relevant search results.
- **Date** will display results in chronological order (if this data exists in Opus 2).
- **Document Name** will display results in alphabetical order.



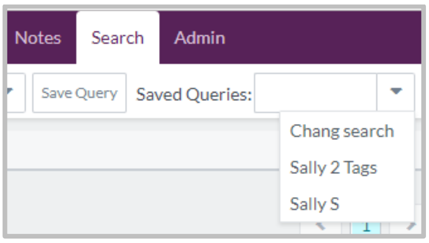
Saving Search Queries

Opus 2 allows the User to save search queries, which preserves the terms and any filters applied. The saved queries are visible to all other Users.

After creating and running a search, click on the **Save Query** button, and type in a name for the query.



Once saved, the query will be available in the **Saved Queries** drop-down menu.



Advanced Searches

The Opus 2 Search tab allows more the construction and saving of more complex searches, using Boolean Operators & the Query Builder, which streamline the process of setting up advanced searches. As with basic searches, please note that advanced searches run through all **SEARCHABLE TEXT** in the database, but do not cover document metadata.

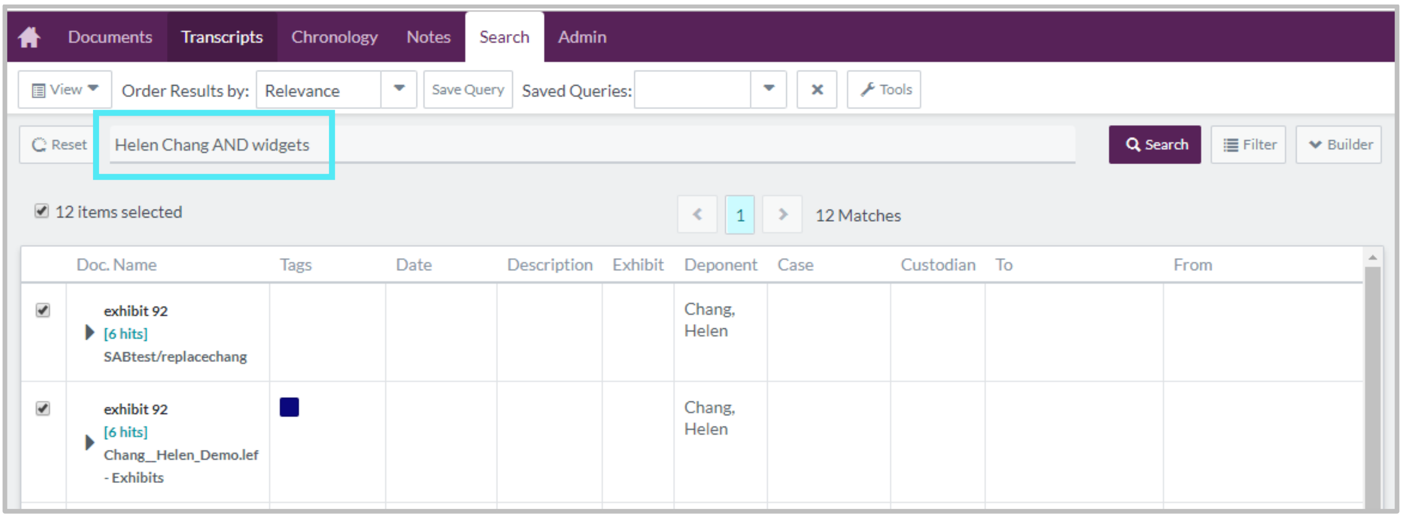
Boolean Operators

Boolean operators allow for terms to be combined in various ways that will affect search results.
The **Search** window will allow for term or phrase searches with Boolean operators (AND,OR).

Entering '**AND**' between two words will return only documents where both terms are present.

Entering '**OR**' between two words will return documents where either or both terms are present.

Please note: When typing a string in the Search window, 'AND' and 'OR' must be entered in **all capital** letters. Phrase searches should be within quotations "", e.g. "sale of goods".

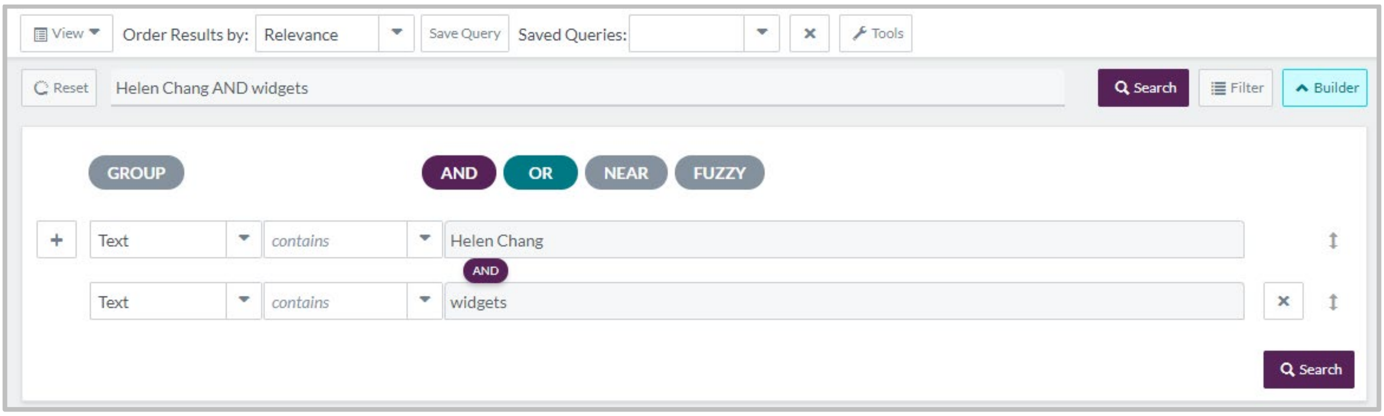


Query Builder

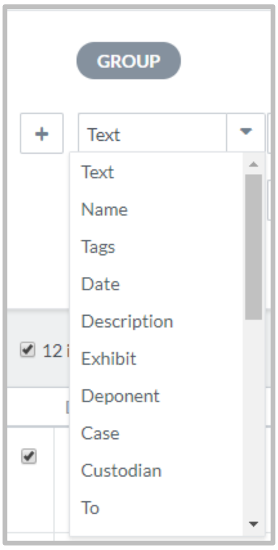
Complex query building is available by clicking on **Builder.** Type in a search term in the search window and click on **Builder** to configure terms, search against metadata, search against Tags, and group sets of search terms. The following sections detail how to build complex queries.

The User can create search queries by **DRAGGING** and **DROPPING** the buttons **'AND'**, **'OR'**, **'Near'** (proximity) and **'Fuzzy'** (approximate) operators from the builder to the search string work area.

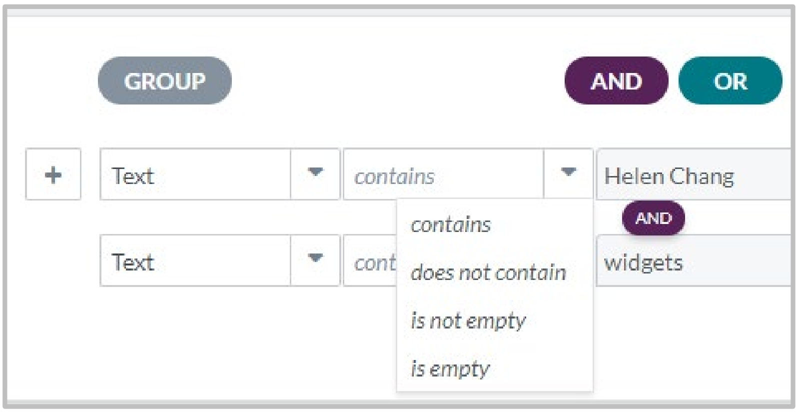
Click on the "**+**" button on the left to add a term line, and **drag and drop the AND/OR button** into the query.



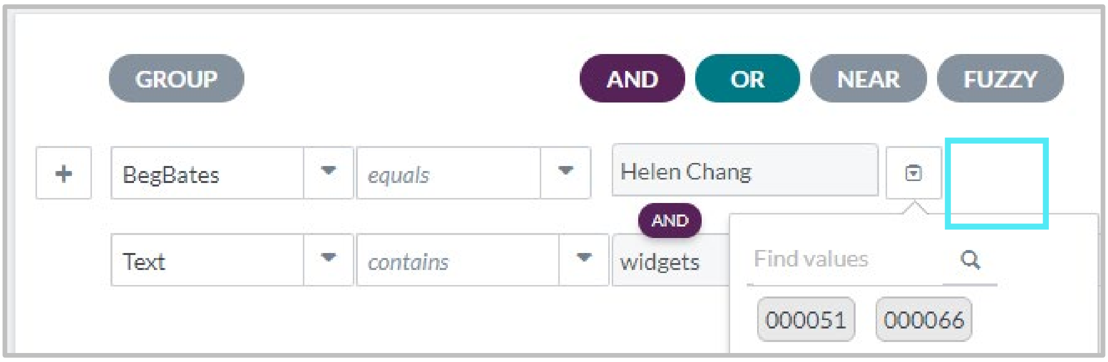
Users have the options to search against searchable **Text**, **Tags** and **Metadata fields** by clicking on the **drop-down menu**.



Users also have **Search Operator options** customized for **Text**, **Tags** and **Metadata field** searches.



Click on the downward arrow for the **library feature,** and Opus 2 then displays all possible values for the selected metadata field.



BEST PRACTICE: CACHE CLEARING

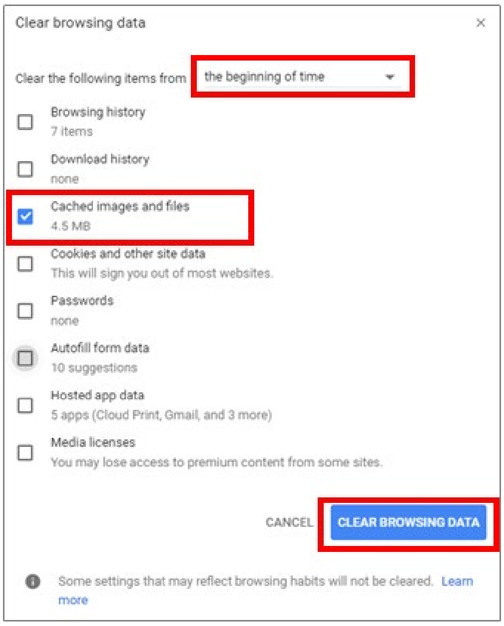
Each time you access a file through your web browser (Internet Explorer, Firefox, or Chrome), the browser caches or 'stores' it so it doesn't have to keep retrieving the same files or images from the remote web site each time you click Back or Forward. As a practice, periodically clearing the cache allows your browser to function more efficiently and ensure that the content you are viewing in Opus 2 is the most current and that access and functionality are most efficient.

Your Browser Cache and Opus 2

Many elements that you see after initially logging in to Opus 2 are stored within your browser cache and cookies. When Opus 2 issues an update, patch, or other change to your server, you may be advised to clear your cache and/or cookies. This forces Opus 2 to freshly download all materials and allows you to fully engage with any new features or settings.

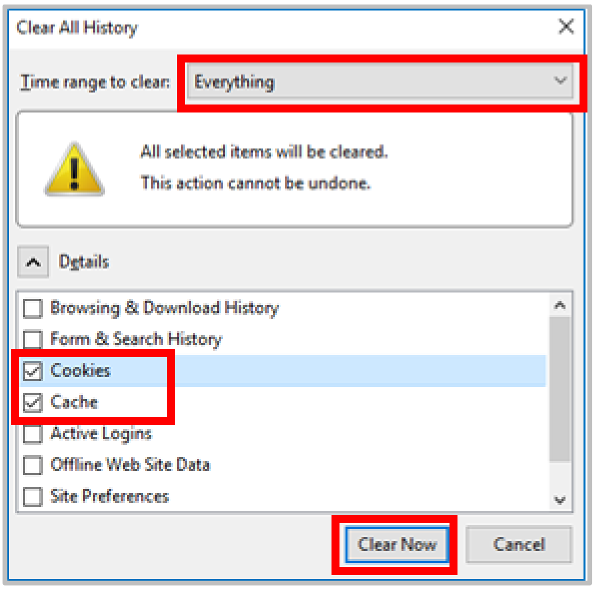
Chrome

·Open a new browser window and press “CTRL + SHIFT + DELETE” to access the “Clear Browsing Data” settings. Select to clear items from “the beginning of time,” check the “Cached Images and Files” box and then “Clear Browsing Data.” Additional information available here: https://support.google.com/chrome/answer/95589?co=GENIE.Platform%3DDesktop&hl=en



Firefox

Open a new browser window and press “CTRL + SHIFT + DELETE” to access the “Clear All History” settings. Select to clear the time range of “Everything,” check the “Cookies” and “Cache” boxes, and then “Clear Now.” Additional information available here: https://support.mozilla.org/en-US/kb/how-clear-firefox-cache



Internet Explorer

Open a new browser window and press “CTRL + SHIFT + DELETE” to access the “Delete Browsing History” settings. Check the “Temporary Internet files and Website files” and “Cookies and website data” boxes, and then “Delete.” Additional information available here: https://support.microsoft.com/en-us/help/17438/windows-internet-explorer-view-delete-browsing-history