

CASE CENTER

Getting started guide for attorneys

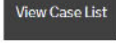
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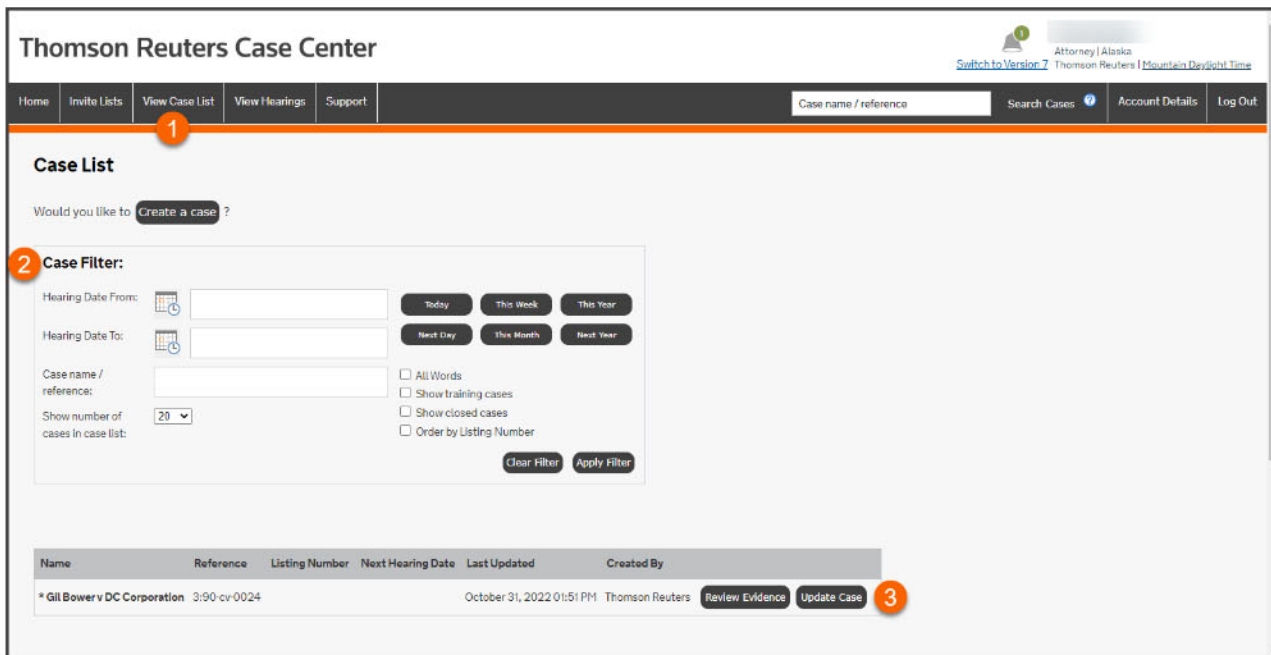
ACCESS CASE CENTER

To access Case Center, go to: **thomsonreuters.caselines.com** or your state/jurisdiction-specific website/instance and then select **Log On** located in the upper right corner.

LOCATE YOUR CASE

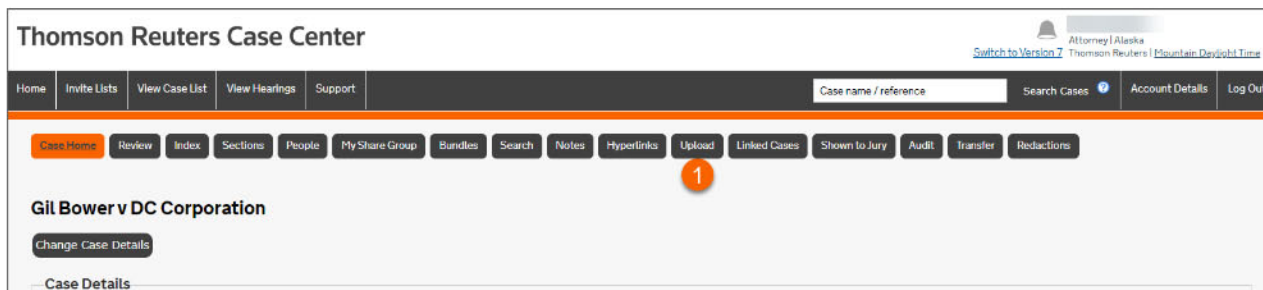
- 1 Upon logging in, select the **View Case List** button ().
- 2 Use the case filters to locate your case by date, keyword, or other available filters. Below the Case Filter section is a list of cases to which you have been invited.
- 3 Select the **Update Case** button to begin uploading your exhibits.

UPLOAD YOUR EXHIBITS

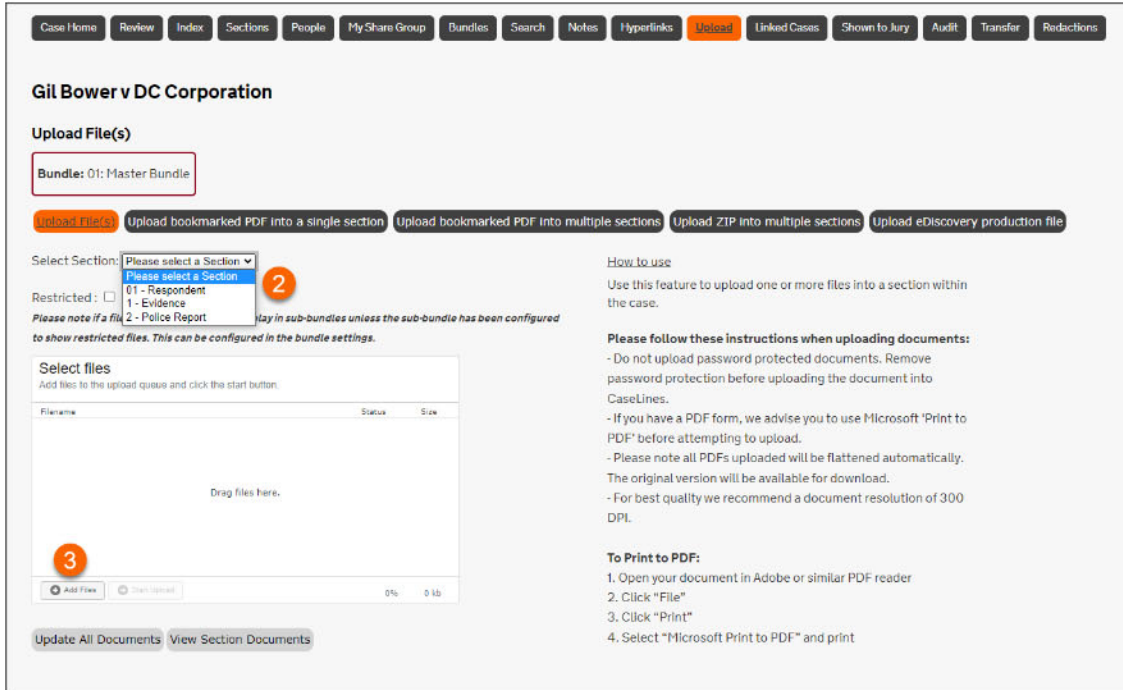


With Case Center, you can upload exhibits directly into the system, including documents, photographs, and videos.

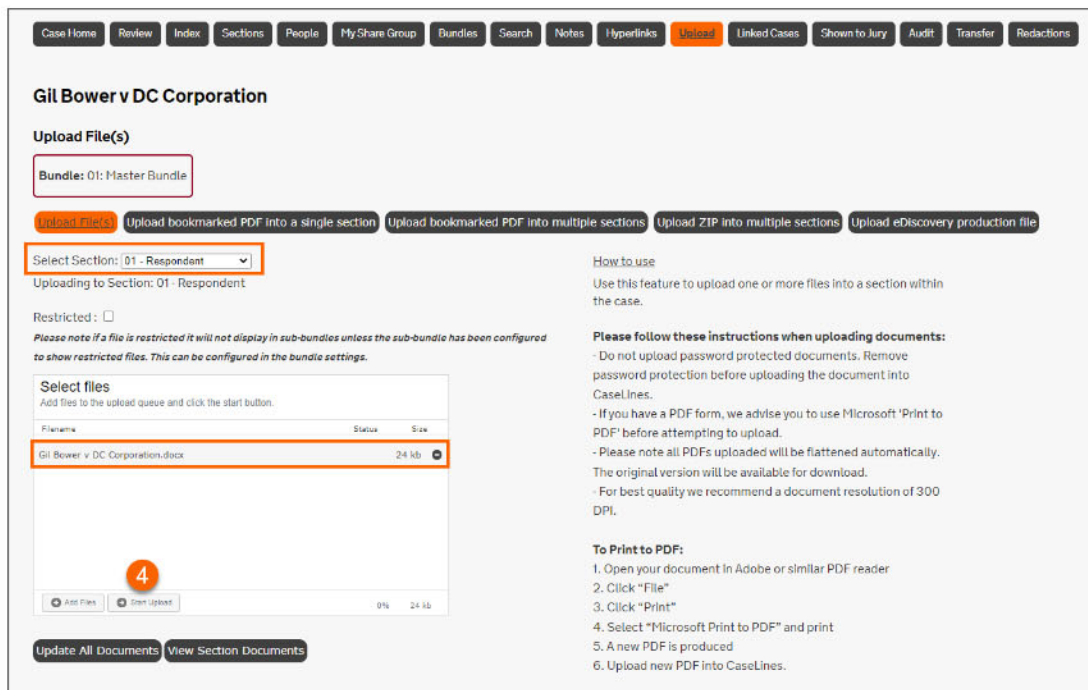
- 1 Select the **Upload** button located on the toolbar at the top of the page to retrieve the page where you will upload your exhibits.



- 2 The court sets up sections for each party to share their exhibits. Select your section from the **Select Section** drop-down menu.
- 3 Select the **Add Files** button.



- 4 Select the documents/photos/videos from your files that you wish to upload and then select the **Start Upload** button.



ORGANIZE YOUR DOCUMENTS

- The court may ask that your exhibits conform to specific naming conventions. Rename your exhibits by selecting the **Update All Documents** button located on the Upload page.

Gil Bower v DC Corporation

Upload File(s)

Bundle: 01: Master Bundle

Upload File(s) Upload bookmarked PDF into a single section Upload bookmarked PDF into multiple sections Upload ZIP into multiple sections Upload eDiscovery production file

Select Section: 01 - Respondent

Uploading to Section: 01 - Respondent

Restricted:

Please note if a file is restricted it will not display in sub-bundles unless the sub-bundle has been configured to show restricted files. This can be configured in the bundle settings.

Select files
Add files to the upload queue and click the start button.

Filename	Status	Size
Gil Bower v DC Corporation.docx		24 kb

0% 24 kb

1 Update All Documents View Section Documents

How to use
Use this feature to upload one or more files into a section within the case.

Please follow these instructions when uploading documents:

- Do not upload password protected documents. Remove password protection before uploading the document into CaseLines.
- If you have a PDF form, we advise you to use Microsoft "Print to PDF" before attempting to upload.
- Please note all PDFs uploaded will be flattened automatically. The original version will be available for download.
- For best quality we recommend a document resolution of 300 DPI.

To Print to PDF:

1. Open your document in Adobe or similar PDF reader
2. Click "File"
3. Click "Print"
4. Select "Microsoft Print to PDF" and print
5. A new PDF is produced
6. Upload new PDF into CaseLines.

- On the Update All Documents page, select the **Document Title** box to begin editing the exhibit name. Your changes are saved automatically.

Gil Bower v DC Corporation

Update All Documents

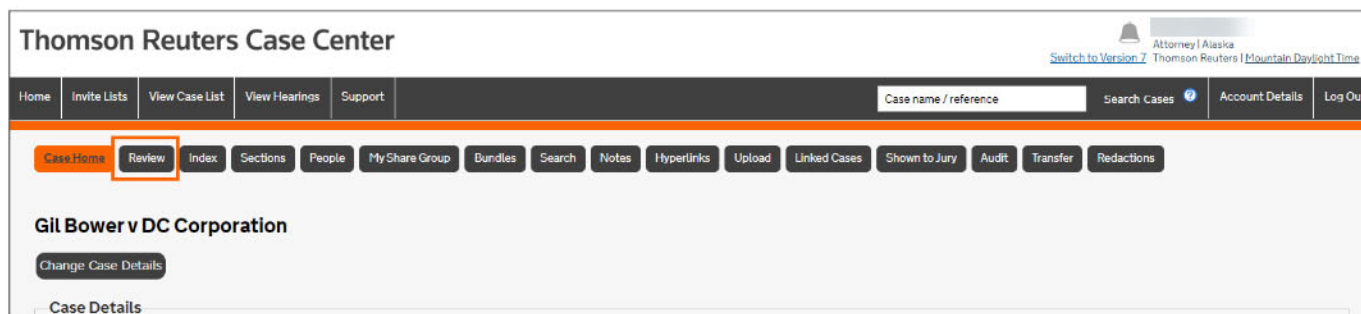
01: Respondent Documents

Click on an entry to edit. Changes are saved automatically.

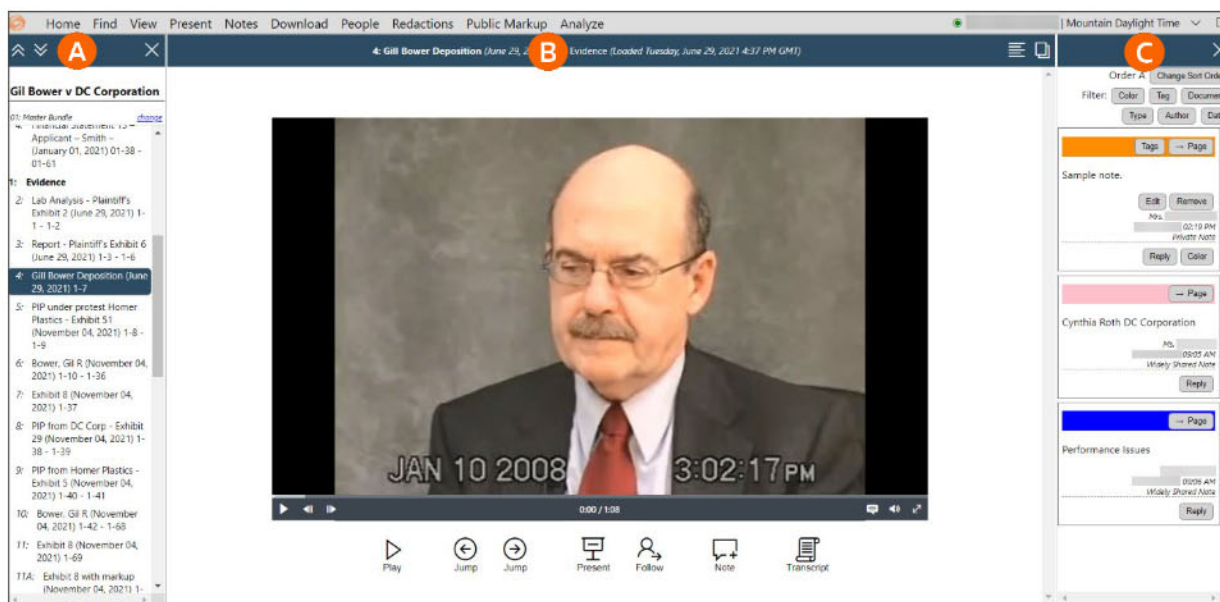
Document Number	Document Title	Document Date	Included	Inverted	Tabbed	Restricted	View	Move	PDF	Remove	Edit
0001	Case Conference Brief 17A - Respondent - Smith -	January 01, 2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View	Move	PDF	Remove	
0002	Certificate of Financial Disclosure 13A - Respondent - Smith -	January 01, 2021	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View	Move	PDF	Remove	
0003	Affidavit of Service 6B - Applicant - Smith -	January 06, 2021	Yes-No-No-No				View	Move	PDF	Remove	Edit
0004	Financial Statement 13 - Applicant - Smith -	January 01, 2021	Yes-No-No-No				View	Move	PDF	Remove	Edit

NAVIGATE THE REVIEW PAGE

Select the **Review** button on the toolbar to load the Review Page.

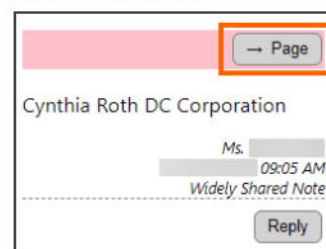


The Review Page is divided into three panes:



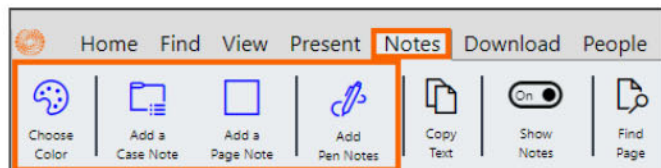
- A** **Index pane:** Located on the left side and allows you to navigate between the different exhibits uploaded by the parties.
- B** **Reading pane:** Located in the center of the page and allows you to view the exhibits. View documents, photographs, and videos in the Reading Pane.
- C** **Notes pane:** Contains notes created by you or others with access to this case. Notes act like bookmarks or shortcuts and allow you to quickly jump to an exhibit with ease.

Select the **Page** button in a note and the Reading pane loads the annotated exhibits.



CREATE NOTES

On the Review page, select the **Notes** tab to expand its ribbon.



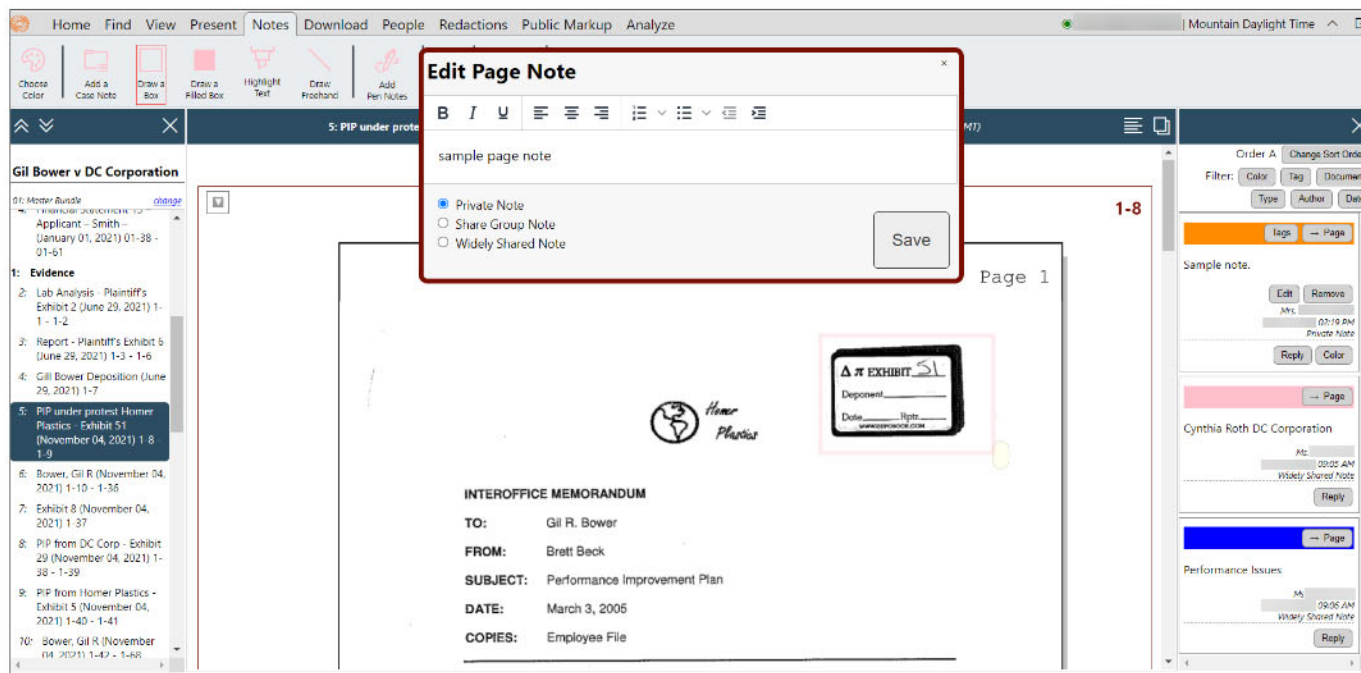
Choose Color: Select a color for the note.

Add a Case Note: Create a general note about the entire case.

Add a Page Note: Create a note attached to a specific page.

Add Pen Notes: Using a touchscreen device, create handwritten notations on an exhibit.

By default, notes are private and visible to the author only. Notes can be private, shared with a select group of individuals, or widely shared with everyone who has access to the case.

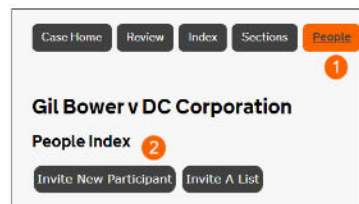


INVITE A WITNESS

Invitations to witnesses are sent through the People tab on the Case Home page. (**NOTE:** If you do not see a People tab when in Update Workspace, the court/agency will need to invite witnesses to the case.)

If you have been given the Permission to Invite, here are the steps to follow:

- 1 From the **Case Home** page, select the **People** tab.
- 2 Select **Invite New Participant** on the **People Index** page.
- 3 On the following page, select **Invite a Witness**.
- 4 The **Name** field is the only required field, but you can enter **Witness 1** to keep the name anonymous.
- 5 Enter an **Email** or **Phone** number if you would like the witness to be sent a PIN. Depending on what field you complete, a witness will be sent an email or text message with the **PIN**.
- 6 Select the following box to receive an email copy of the **PIN**.
- 7 Select **Invite**. The list of invited witnesses will be displayed on the **People Index** page.

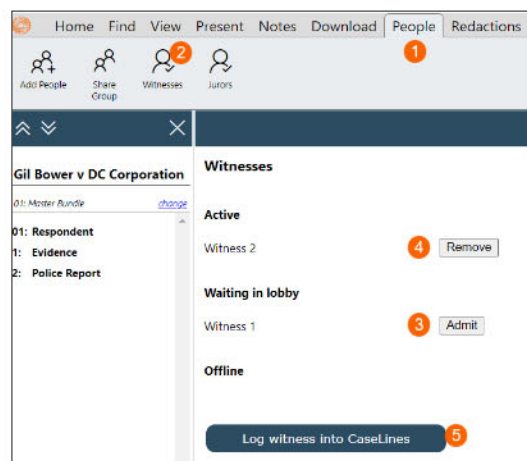


ADMIT A WITNESS ON A DEDICATED DEVICE

If the witness has a dedicated device, direct the witness to the **URL** for the witness portal. The witness will enter their **PIN** on the first screen and wait in the lobby until admitted.

To admit the witness, begin in the **Review Workspace** for the case.

- 1 Select the **People** tab.
- 2 Select **Witnesses**. You will see the witnesses **Waiting in Lobby**.
- 3 Select **Admit** next to the witness you would like to admit into the case.
- 4 The witness will be moved to **Active** and see the evidence. Select **Remove** to stop their view and admit the next witness.
- 5 Select **Log Witness into CaseLines** to admit a witness listed under **Offline**. This allows a witness who was not given a **PIN** or has forgotten their **PIN** to view the **Review Workspace**. This feature is also used when the witness does not have a dedicated device.



ADMIT A WITNESS ON A SHARED DEVICE

When there is a single shared screen for the witness, use the **Log witness into CaseLines** feature to display the witness view on the shared screen.

FIND EXHIBITS AND DIRECT PARTICIPANTS TO THE SAME PAGE

- 1 Select the **Find** tab at the top of the page to expand its ribbon.



Find Exhibits

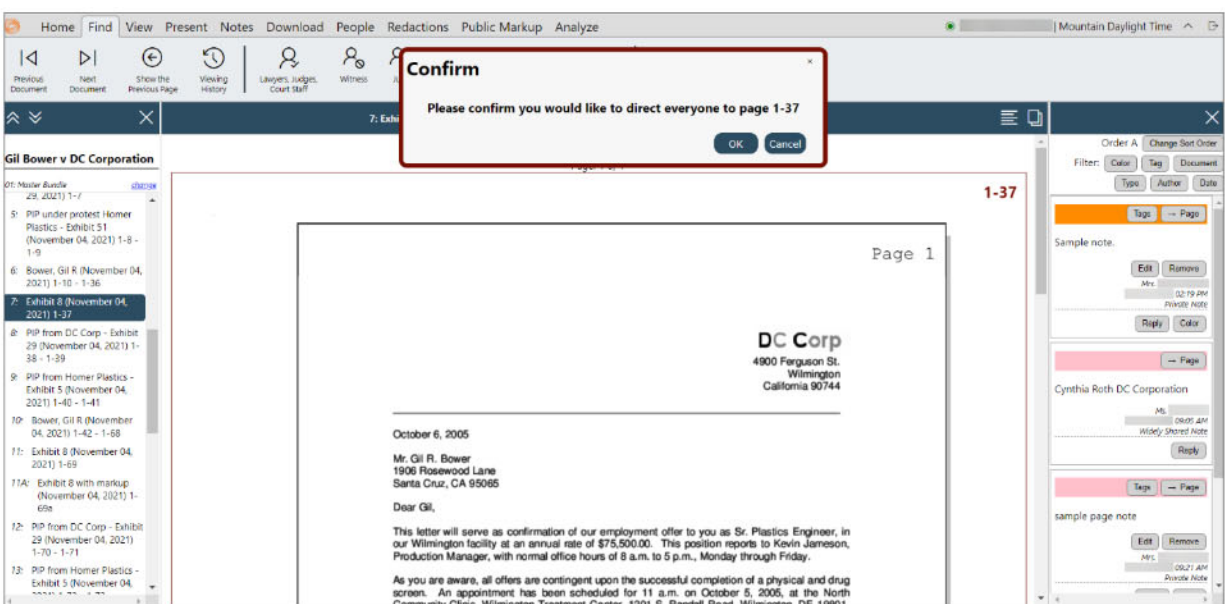
You can find an exhibit by page number or keyword search. Uploaded exhibits are automatically assigned (by Case Center) and page numbers are in the upper right corner.

- 2 To find an exhibit by:
 - **Keyword search:** Select the **Search Case** button, enter your keywords into the field provided and select **Search**, **Search Current Document**, or **Search Current Section**.
 - **Page number:** Select the **Find Page** button and enter the desired page number.

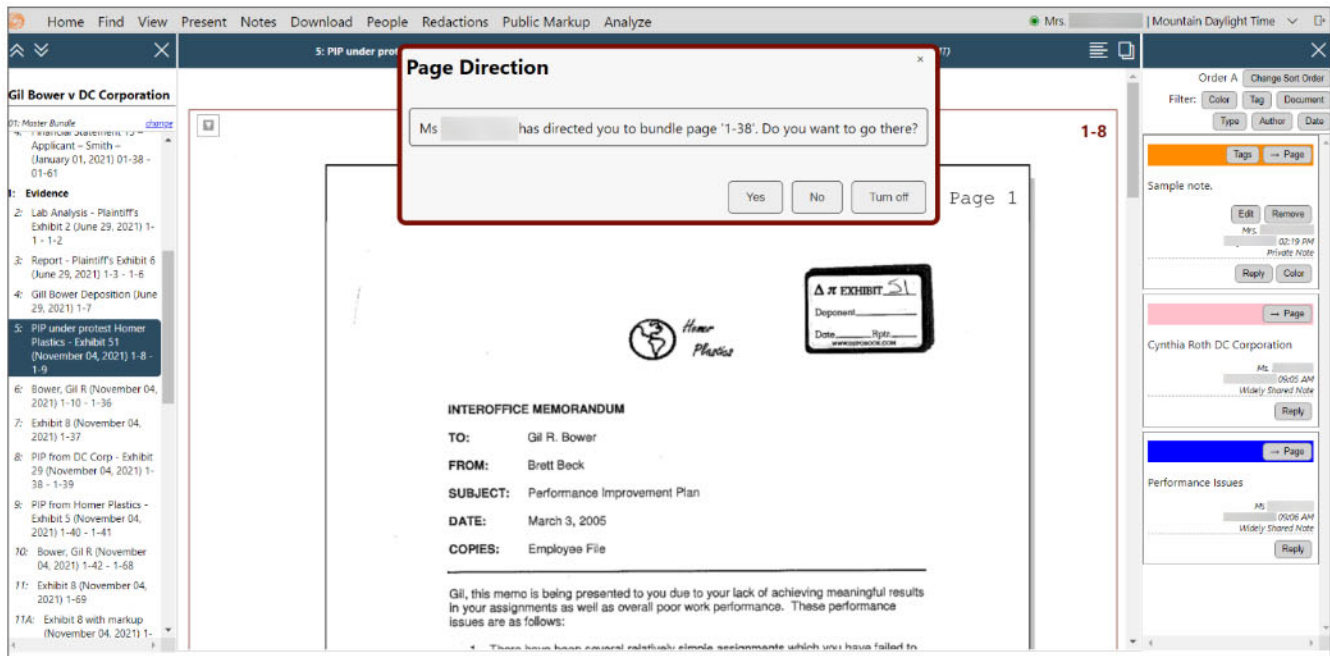
Get participants on the same page

You can direct others to a specific page by using real-time page notifications.

- 3 Select **Direct Others to Page** and confirm the page direction.



When receiving a page direction, a notification appears on your screen. Select **Yes** to accept the page direction and move to the requested page.



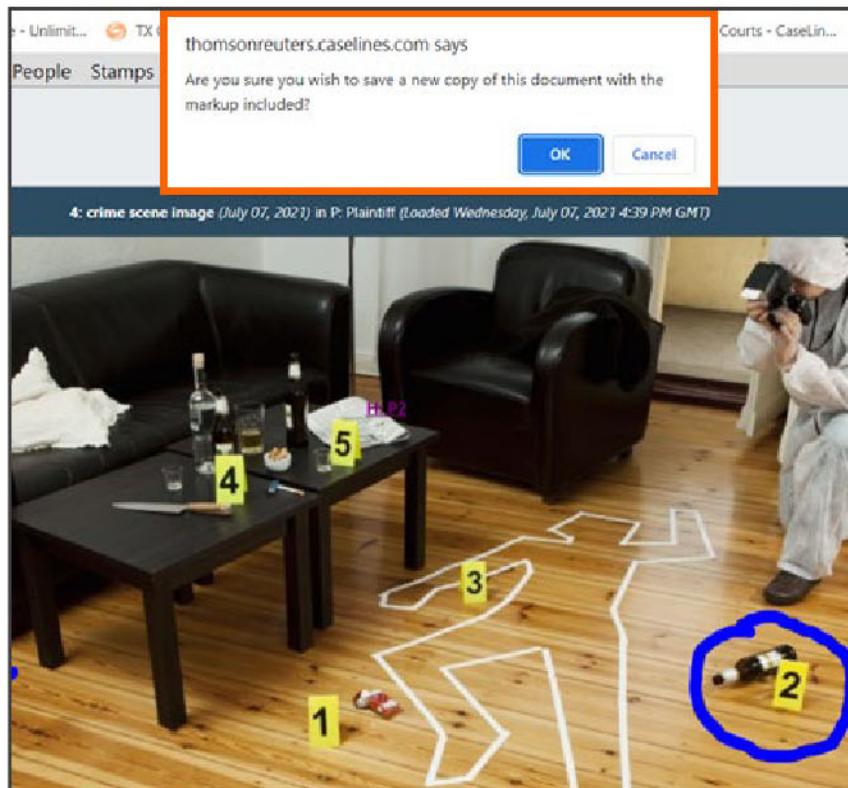
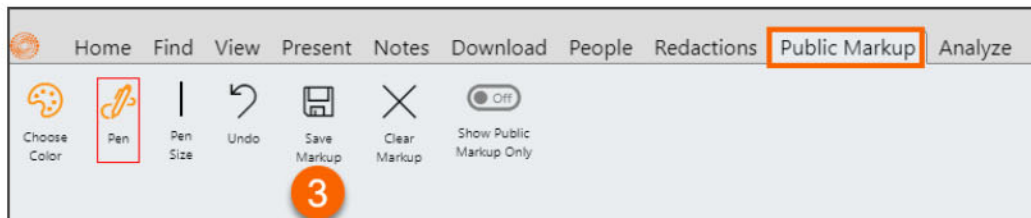
QUESTION A WITNESS

Use Public Markup if the witness marks a document and the marked document needs to be saved.

- 1 Select the **Public Markup** tab.

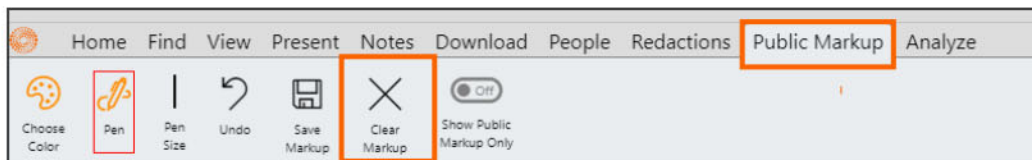


- 2 Select a color. Instruct the witness to mark the document.
- 3 To save the marked document, select the **Save Markup** button and then the **OK** button in the pop-up box.



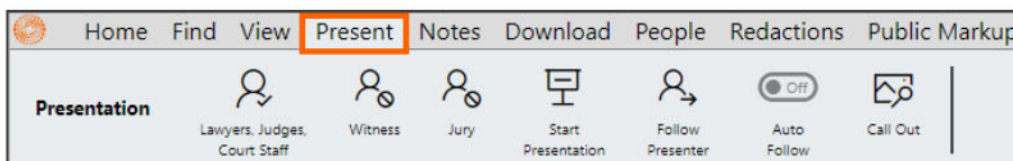
Once the document is saved, you will see that marked copy of the document as a new entry in the Index pane.

When questioning more than one witness, the best practice is to select **Clear Markup** before showing the second witness the same document.

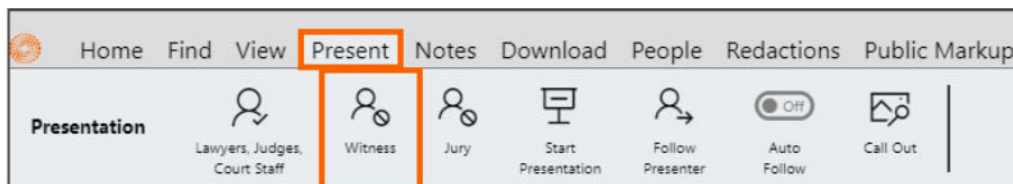


USING THE PRESENT FEATURE

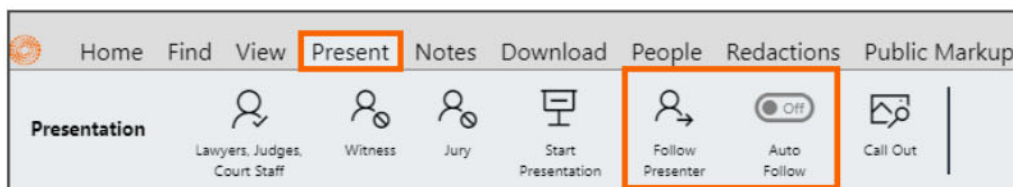
When you want to present an exhibit in court, use the **Present** tab on the Review screen.



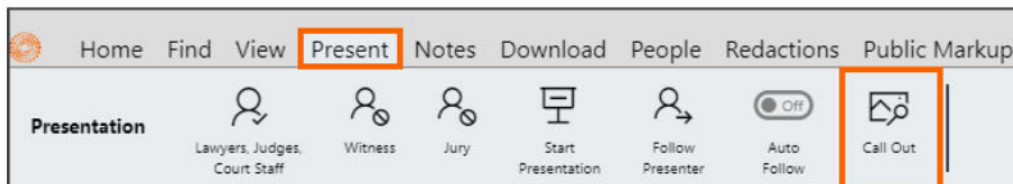
Select who you will be presenting to (i.e.: lawyer/judge, witness, jury, or all three).



Before presenting, announce that you will be presenting so that all participants can turn on **Follow Presenter** or select **Auto Follow**.



The **Call Out** button allows you to emphasize or enlarge text or images within a document as you present.



The screenshot displays a legal document viewer interface. At the top, there is a navigation bar with tabs for Home, Find, View, Present, Notes, Download, People, Redactions, Public Markup, and Analyze. Below this is a toolbar with icons for various actions like Presentation, Layers, Judges, Witnesses, Jury, Steno, Hearings, Exhibits, Hearings, Auto, Filter, Page Direction, and Auto Direction. The main document area shows a page titled "11: Exhibit 8 (November 04, 2021) in 1: Evidence (Booked Thursday, November 04, 2021 8:27 PM GMT)". The document text includes an employment offer for a Sr. Plastics Engineer position at an annual rate of \$75,000.00. A red box highlights a specific sentence in the text: "Federal law requires proof of identity and employment eligibility within 48 hours of employment." To the right of the document, there is a sidebar with a search filter, a "Sample case note" section with a "Tag" button, and another "Sample page note" section with "Tag" and "Print" buttons.