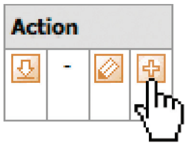
Annotating documents

Manage your lists of case files with your own annotations and status flags. Search for files based on your annotations and status flags.

1. In the Case Repository > Files screen, you can add notes or other annotations to a file listing by clicking its add (+) button.

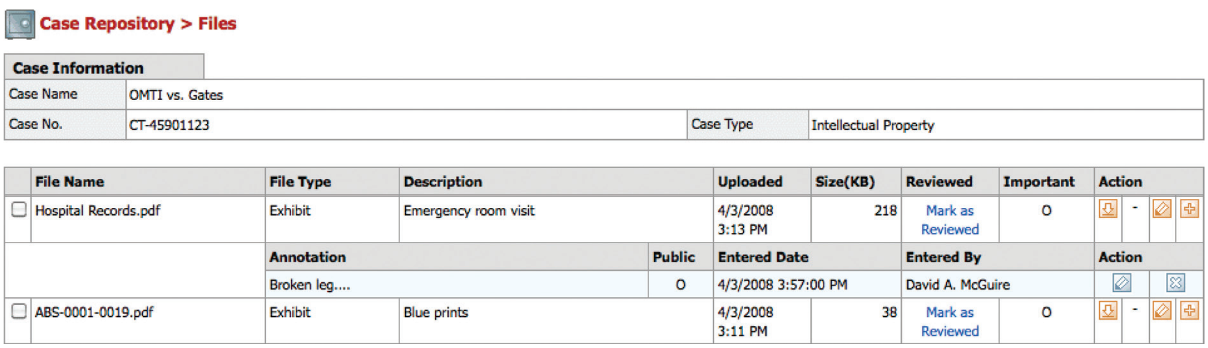


2. In the New Annotation pop-up window, enter your information in the **Annotation** field.

3. In the **Public** drop-down, select:
   - **Yes** – If you want your annotation to be seen by others.
   - **No** – To keep an annotation private.

4. Click **Save.** Your annotation appears in a separate line under its file listing. An O appears in the **Public** column of any annotations that can be seen by others. Each file can have an unlimited number of annotations.

5. Flag a file as important by clicking its edit (pencil) button. In the Edit Annotation Flag pop-up window, choose Yes in the drop-down, then click **Save.** An O appears in the **Important** column of any flagged files.



Case Repository > Files

Case Information			
Case Name	OMTI vs. Gates		
Case No.	CT-45901123	Case Type	Intellectual Property

	File Name	File Type	Description	Uploaded	Size(KB)	Reviewed	Important	Action
☐	Hospital Records.pdf	Exhibit	Emergency room visit	4/3/2008 3:13 PM	218	Mark as Reviewed	O	-
		Annotation	Public	Entered Date		Entered By		Action
		Broken leg....	O	4/3/2008 3:57:00 PM		David A. McGuire		
☐	ABS-0001-0019.pdf	Exhibit	Blue prints	4/3/2008 3:11 PM	38	Mark as Reviewed	O	-

6. To edit individual file annotations, click the annotation's edit (pencil) button and change the **Annotation** field contents in the Edit Annotation pop-up window.

7. To delete an annotation, click its delete (X) button, then click **OK** in the warning box.

TIP

If you add annotations to case files, you can search for specific files by entering text in the **Personal Annotation** field in the Case Repository Search Criteria. You can also filter search results by selecting Yes or No in the **Important** drop-down under Search Criteria.