



# Anatomy of the Casedo Workspace

for Casedo v1.1.0

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User Manual for Casedo v1.1.0

## Welcome to Casedo

Congratulations on installing Casedo - Made by lawyers, for lawyers, Casedo is the multi-document reader and organisation tool streamlining the legal analysis and court bundling process.

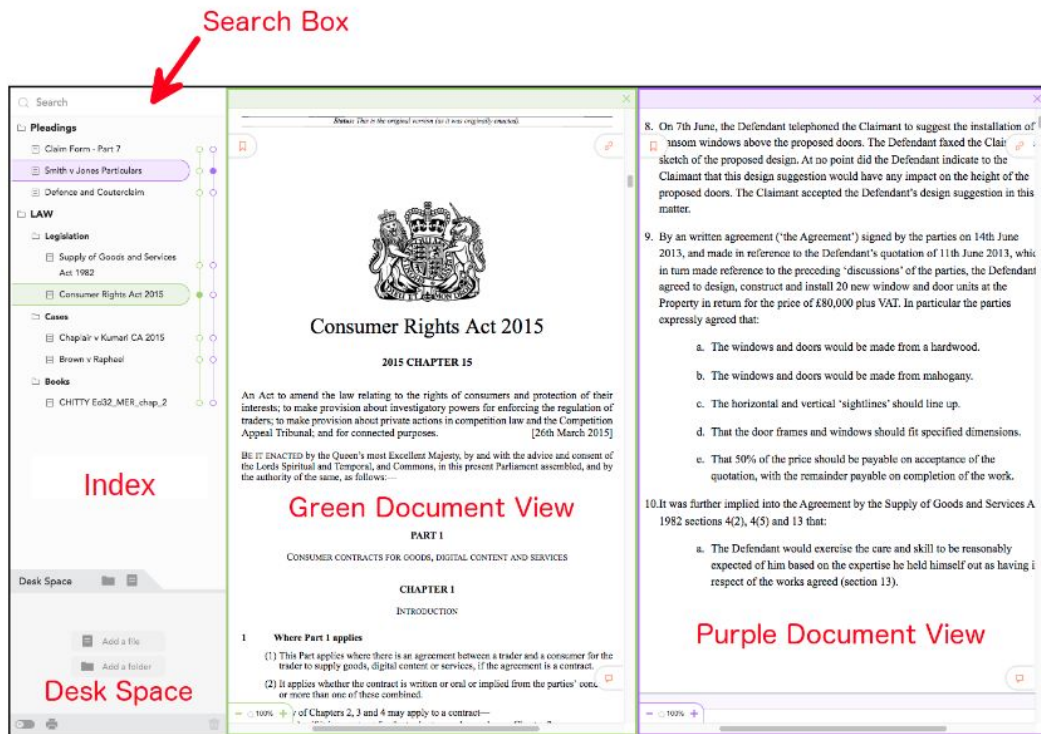
Casedo is designed to be simple, quick to learn, and easy to use. It reduces the amount of time spent on case preparation, so you can focus on the analysis, argument, and articulation of your case. We recommend you now follow the onscreen tutorial for a quick tour (2 minutes at most).

But if you prefer to learn by reading rather than try it out for yourself this document gives you a more detailed overview of Casedo's workspace, features, and best practices.

And if you have any questions or suggestions don't hesitate to email us at [support@casedo.com](mailto:support@casedo.com).

## Anatomy of the Casedo v1.1.0 Workspace

The default Casedo Workspace has five functional areas annotated in the following screenshot.



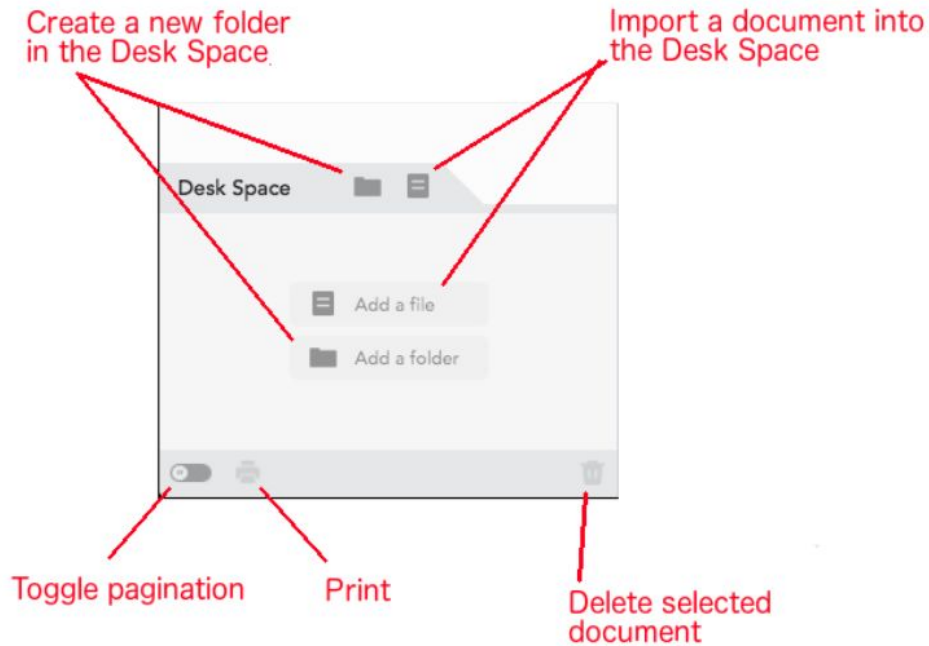
### Areas

Working anti-clockwise from the top left, the boxes are:

- **Search Box** - Pretty self-explanatory, this is where you can search for terms in the imported Casefile of documents showing in the Document Views.
- **Index** - This is where you will organise your separately imported documents and folders from the Desk Space and organise them, with the help of bookmarks, into a coherent Casefile.
- **Desk Space** - This is where newly imported documents are held. It's a holding window for documents and folders, a place for documents that are not yet ready to be put into the organised Index space. For more information see *More on the Desk Space* below.
- **Green Document View** - This is one of the two document views. It is where imported documents can be read and marked up. The orange icons are drag and drop tools to add bookmarks, links, and comments.
- **Purple Document View** - This is the other document view. The relative size of the two Document Views can be adjusted by dragging the divider between them.






## Buttons in and around the Desk Space

The bottom left hand corner of the Casedo Workspace contains a variety of tools:



In this screenshot, it can be seen that the "Print" icon is faded out, this is because no document has been selected.

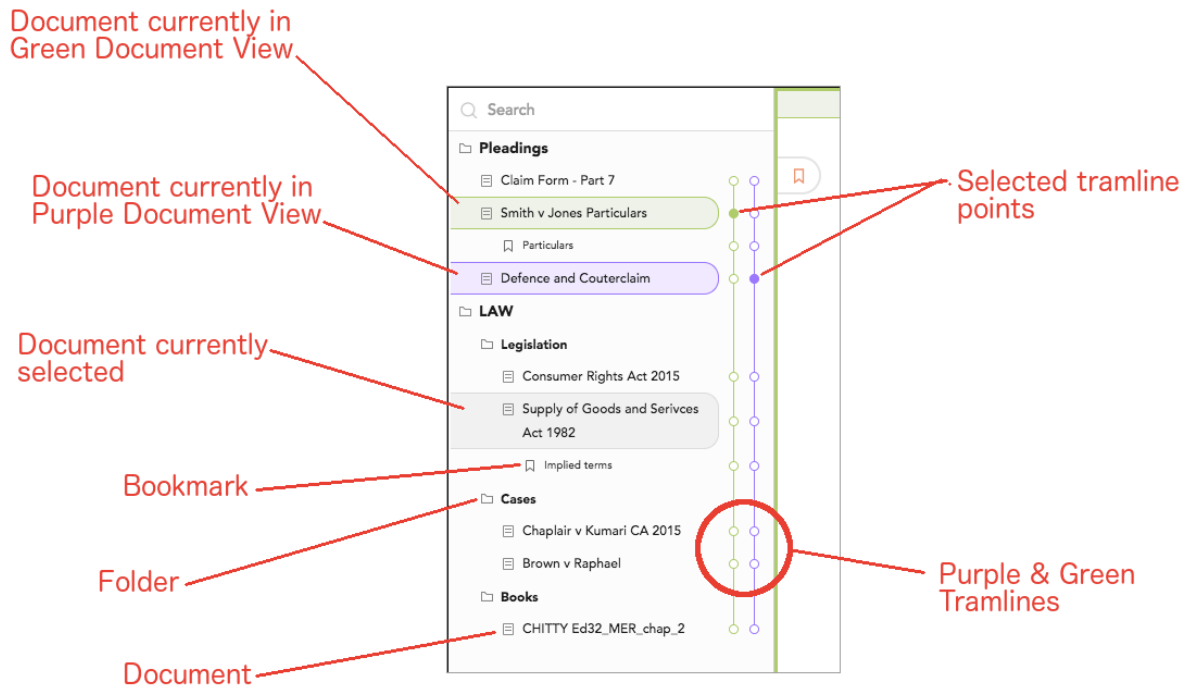
Here's a tabular summary of the buttons above:

Icon	Function
	Create a new folder in the Desk Space
	Import a document into the Desk Space. Documents can also be dragged and dropped in from the local file system.
	Toggle pagination (create page numbers over the entire Casefile in the Index)
	Print entire Casefile (not including items in Desk Space)
	Delete selected item

## Index & Tramlines

### Index

The Index is where documents imported into Casedo are ordered and reordered. It displays all the folders, documents, and bookmarks added to the Casefile, and allows you to navigate your Casefile quickly. It might look like the following:



In the Index you can:

- Rename a document or folder by double-clicking on its name.
- Select a folder, document or bookmark to delete it.
- Reorder the Index by dragging and dropping folders or documents to a new position, or by moving either to the Desk Space.
- Select which part of your document you want to look at using the tramlines.

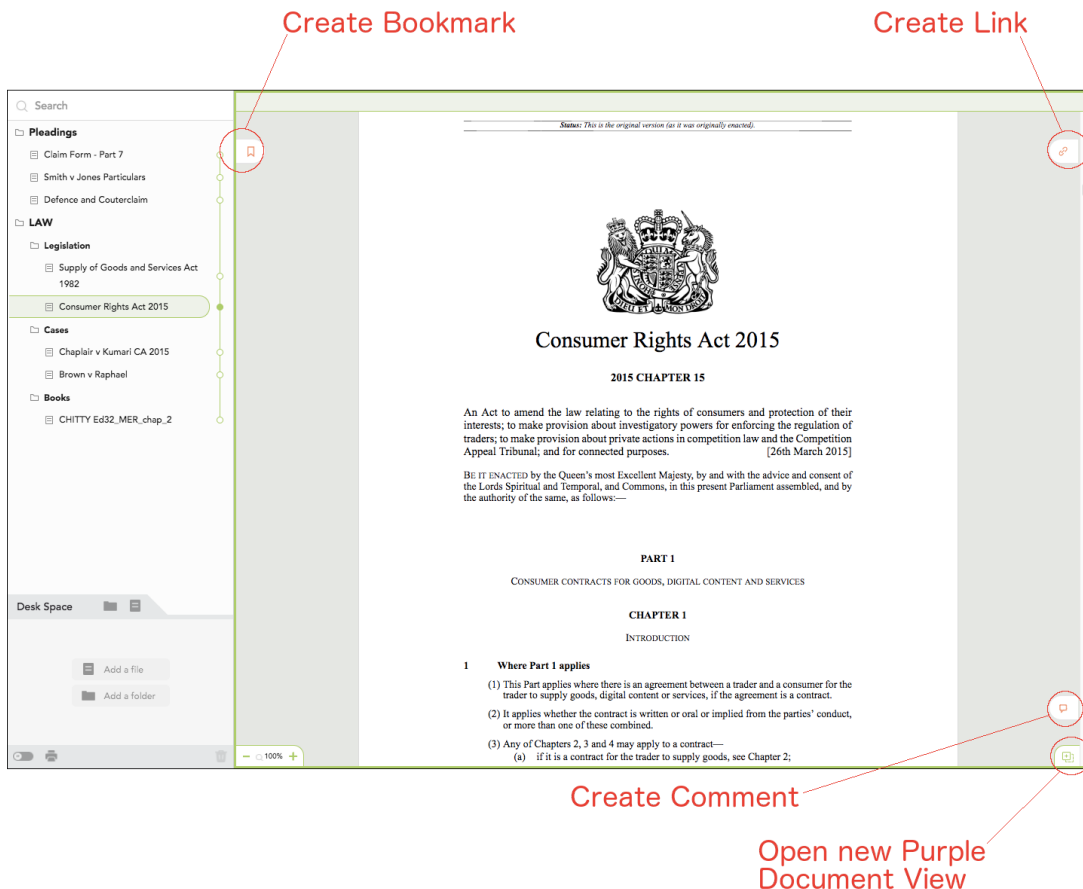
### Tramlines

The tramlines help to navigate through a Casefile using multiple Document Views. You can see that the tramlines match the colour of the Document Views themselves. To see a document in either the Green or Purple Document View, click on the corresponding tramline point.

As you scroll through a Casefile in any of the Document Views, or use search or links to move around your Casefile, the tramlines will update to show which document or bookmark is being viewed.

## Annotations

There are four principal types of on-document annotations in Casedo: Bookmarks, Links, Comments, and Highlights. For the first three use click, drag and drop to add the appropriate orange icons to the document:



### Bookmarks

Bookmarks are the primary tool for making a Casefile easy to navigate and for finding again the parts of your Casefile that are most important. They allow you to both divide a document up into chapters and to mark important passages so that they can be found again quickly.

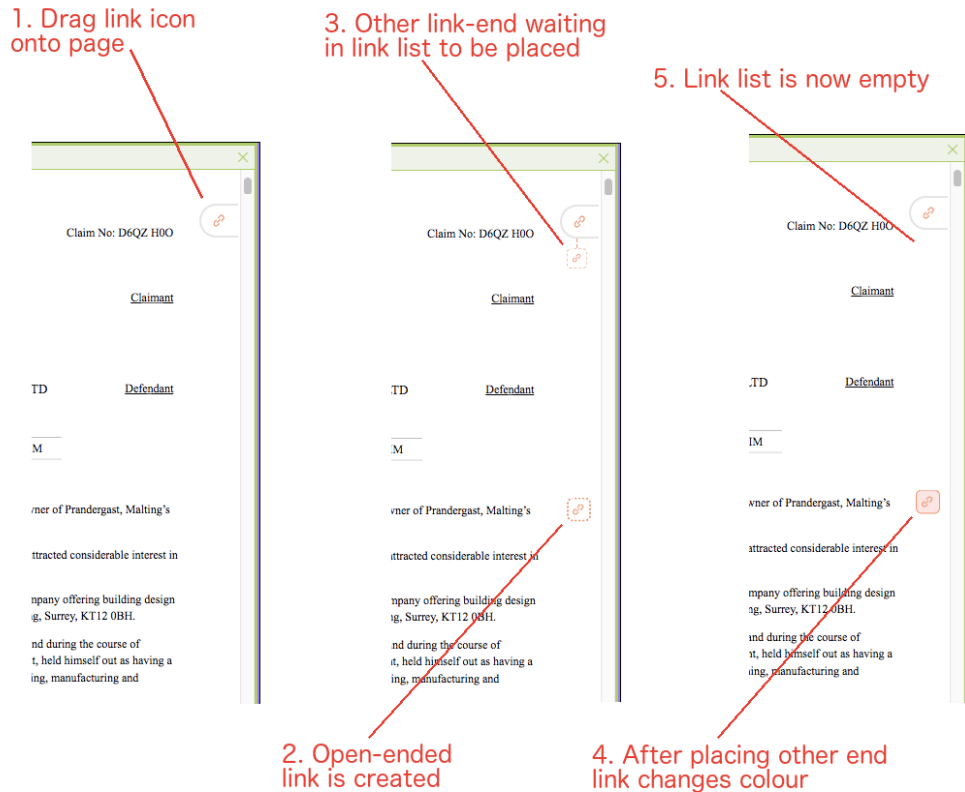
To add a bookmark, drag the bookmark icon onto the page and release. You can then name the bookmark by typing in a name. The bookmark will also appear in the Index under the document it is attached to.

To rename a bookmark, double click the name. To move it, drag it to a new position. To delete a bookmark, select it in either the Document View or the Index and click delete.

## Links

Links connect two points in a Casefile, forming a two-way portal between pages.

To add a link, drag the orange add link icon onto a page and release. This lays down one end of the link. The other end appears in the link list under the add link icon, waiting to be connected. Navigate to another part of the Casefile and drag that end of the link onto the page to complete the link.



To use a link, double click on one end to jump to the other. Double click again to jump back.

If you have two Document Views open, you can drag one end of a link into the other view to navigate that other view to the other end, allowing you to see both ends at once.

To delete a link end, select it and click delete.

## Comments

Comments are a simple way of adding a note to the side of a page.

To add a comment, drag the comment icon onto the page and release. To delete a comment select the comment icon and click delete.

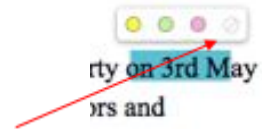


## Highlights

Highlights allow you to pick out important passages or information so it can easily be spotted again.

To add a highlight, simply select some text and then choose the preferred colour from the pop up menu.

To delete a highlight, click on the highlight *once* and choose the right hand 'no colour' icon:



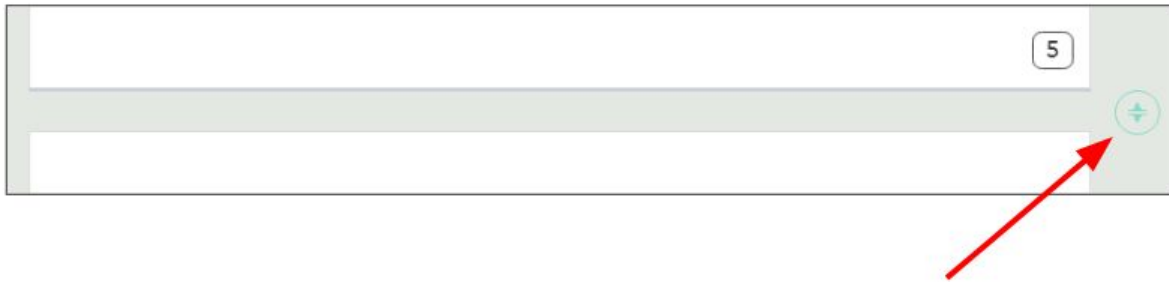
Like search, highlights only work if the pdf imported is searchable. For more information see *Preparing Documents for Casedo* below.

## Splitting & Merging Documents

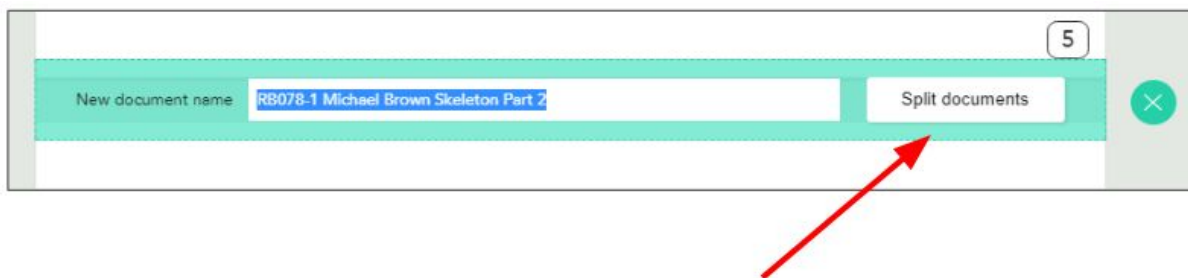
These features allow you to break apart large documents into individual sections, or to combine documents that belong together. It also allows you to remove sections of a document that are not needed by separating it off so that it can be deleted.

### Splitting Documents

If you want to split an existing document into two (or more) documents, scroll to the end of the page where you want the document to be split and select the split icon on the right.

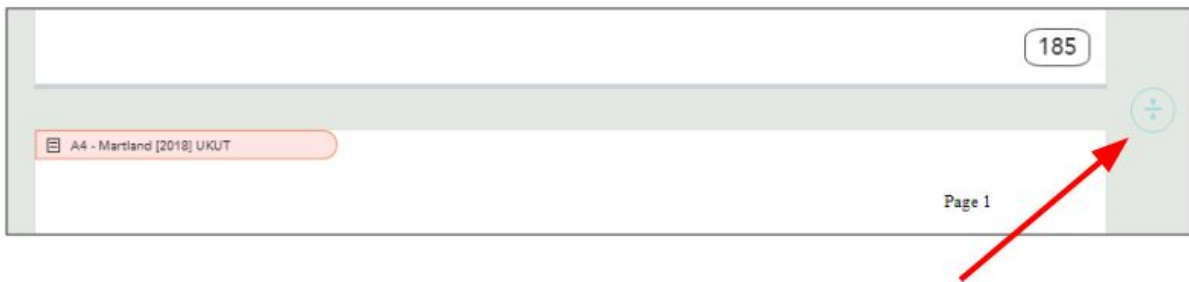


Once that has been selected, you will then be asked to confirm the split. At this point you have the option to rename the newly created document, or cancel the split altogether by clicking the cross (X) on the right hand side.



## Merging Documents

If you want to merge two existing documents, first arrange them next to each other in the correct order in the Index. Then scroll to the end of the first document and select the merge icon on the right.



Once that has been selected, you will then be asked to confirm the merge. At this point you have the option to cancel the split altogether by clicking the cross (X) on the right hand side.



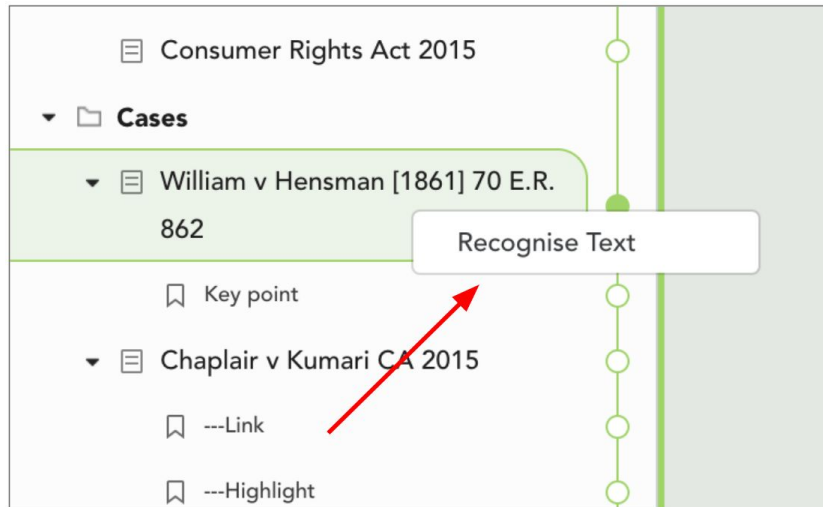
The title of the lower merged document is used as a bookmark in the new single document.

## OCR (Optical Character Recognition)

OCR allows you to make a document searchable and its text selectable for highlighting. This feature currently works best with letters and other short documents to a maximum of sixty pages in length. It takes around 30 seconds to scan a single page..

To do this:

1. Right-click on the unreadable pdf document (not the bookmark tab)
2. Select 'Recognise text'





If you want to stop Casedo from searching the unreadable text mid-operation, simply press the ESC key on your keyboard. Casedo will start canceling the operation and display a message asking you to wait a few seconds.

Note:

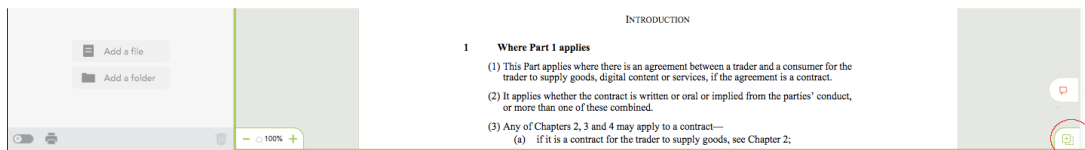
There is currently a 60 page limit for scanning documents. However, if you want to scan a longer document within Casedo, you can always use the Split feature to split the document up into lengths that can be OCR'd and then use the Merge feature to put them back together again. However, we recommend that large documents should be scanned *before* being imported into Casedo.

## Working with only one Document View


It is sometimes desirable to use only one Document View - for example, because you are working on a small laptop. To do this simply click on the Close Document View icon at the top right of each Document View window.

Icon	Function
	Close Purple Document View
	Close Green Document View

You'll notice that at the bottom right of the open Document View a new icon has appeared. This will open a new Document View.



Open new Purple Document View

Icon	Function
	Open new Purple Document View

New Document Views open at the same place in your Casefile as the one that is already open.

## Resizing Windows

With both Document Views open, you can resize the relative widths of the views. To do this simply hover the mouse anywhere over the 'join' between the two Document Views until a black icon appears with arrows pointing left and right, then drag the icon in either direction to resize the windows to the desired size.

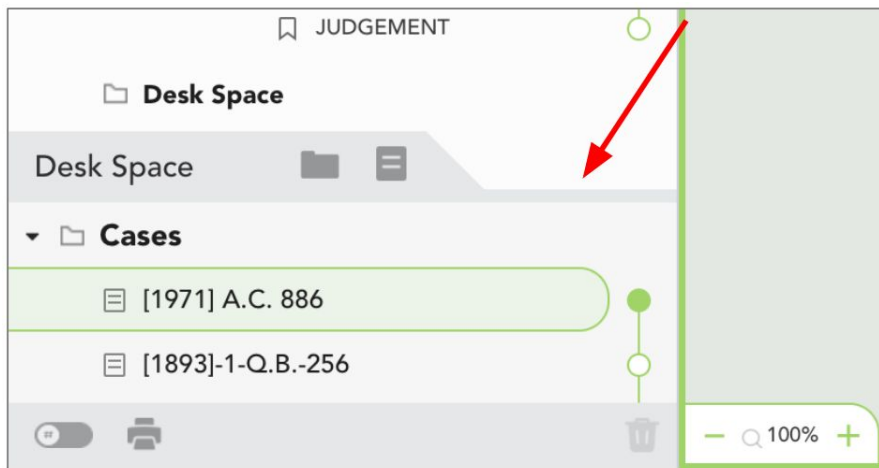
The same is also true of the Desk Space which can easily be resized in order to make it larger to view a greater number of documents.

## Resizing the Desktop / Index

You can also resize the desktop and the index by making the desktop larger or smaller..

To do this:

1. Hover your mouse on the line that separates the index from the desktop



2. Then click on it, dragging it up or down accordingly.

## More on the Desk Space

Some are initially puzzled by the Desk Space. What is it for? Why can't we just import things straight into the Index? But once understood it is a simple, flexible, and powerful feature.

Casedo exists to make sense of your documents - to order them and name them and put them in context. But when you import new documents, or add a new folder, this work is still to be done. The Desk Space is, firstly, a space for these documents and folders which have not yet found their proper place. Holding them here prevents them cluttering up your well organised Casefile (hence the name: it is the temporary place you put a document before it is properly filed, but where you can still read it and figure out what it is).



As well as taking new documents, the Desk Space can also be used to pull documents or folders out of a Casefile without deleting them entirely. Some users create a folder called 'Trash' in the Desk Space so that they can get rid of documents without having to delete them permanently. It is also useful if you wish to print only a part of your Casefile, or as a place to keep tangential materials that are less relevant to your primary task.

However, you are free to use it as you like: all of Casedo's features work exactly the same whether a document is in the Index or the Desk Space, and you can even create links between the two.

## Preparing documents for Casedo

Casedo now has an OCR feature, but you could also use external software to make sure your files are in the right format. It is important to note that the OCR in Casedo is best used for small numbers of pages, so it is much better to OCR your large documents before importing them.

Of course, don't forget that since v1.0.0 you can import Word documents directly into Casedo, there is no need to convert them to pdfs beforehand.

### PDFs should be searchable

Though one pdf looks much the same as another to most of us, in fact they do come in a variety of formats, the main three being:

**Searchable** - Searchable pdfs are what you get if you save a word document as a pdf. The text is embedded in the pdf document and can therefore be searched and highlighted by Casedo.

**Non-searchable scans** - A non-searchable pdf is usually a scan of a document, and because to the computer it is just an image, it's not searchable.

**Fillable forms** - A fillable form is a searchable pdf with a whole set of additional functionalities, as such it is searchable, but can cause layout problems in Casedo.

Casedo loves searchable pdfs. They can be searched and highlighted easily.

### Making a pdf searchable

The easiest way to do this is using Casedo's internal OCR function. However, if you have large documents it is best to use a premium service such as one of the following (there are many alternatives on the market),

Adobe Acrobat Pro (<https://acrobat.adobe.com/uk/en/acrobat.html>) is a subscription-based service.

ABBYY FineReader (<https://www.abbyy.com/en-gb/finereader/>) offers a perpetual license for its software. There are also many free online services such as OCR.space (<https://ocr.space/>).

Once you have a searchable pdf in your grasp, you can import it into Casedo in the usual way.





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## Break up large documents or Casefiles into smaller chunks

It's very tempting to scan a 300-page document and import it directly into Casedo. The downside is that Casedo will only recognise it as a single document, and the Index will reflect this. Whilst bookmarks and linking etc. will still be available, the Index will contain a single item, which can therefore not be re-ordered.

The best way to break up a large document is to not scan it in one piece in the first place! If this is unavoidable, using a free service like Adobe Acrobat Reader to 'Print to pdf' different sets of pages, is the easiest way to achieve this.

## Keyboard Shortcuts

Keyboard shortcuts are the quickest way to navigate Casedo. For the functionality referred to below, check out entries in the pages above for that particular solution.

<b>Action</b>	<b>Mac OS</b>	<b>Windows OS</b>
Create a new Casefile	⌘ + n	Ctrl + n
Open an existing Casefile	⌘ + o	Ctrl + o
Save Casefile as...	⌘ + s	Ctrl + s
Create a new search	⌘ + f	Ctrl + f
Toggle pagination	⌘ + k	Ctrl + k
Print a .case file	⌘ + p	Ctrl + p
Stop printing a .case file	ESC	ESC
Quit Casedo	⌘ + q	Ctrl + q