



The Casedo Workspace

for Casedo v1.2.0

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User Manual for Casedo v1.2.0

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.

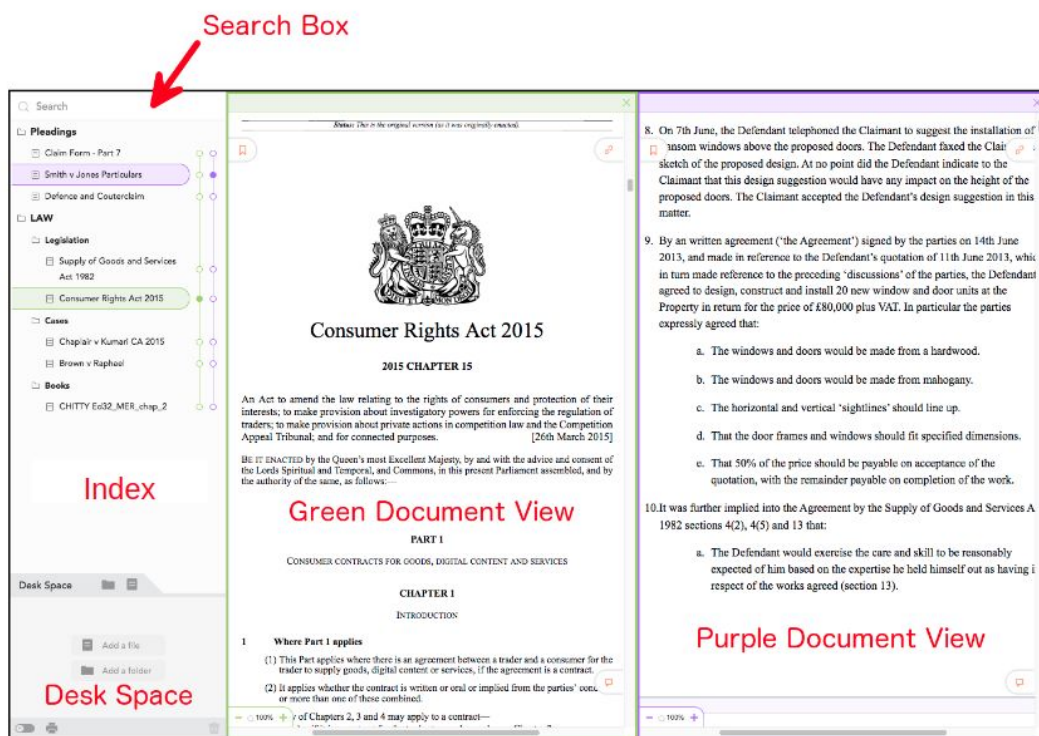
Casedo is designed to be simple, quick to learn, and easy to use. It reduces the amount of time spent on case preparation, so you can focus on the analysis, argument, and articulation of your case. We recommend you now follow the onscreen tutorial for a quick tour (2 minutes at most).

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.

The Casedo v1.2.0 Workspace

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



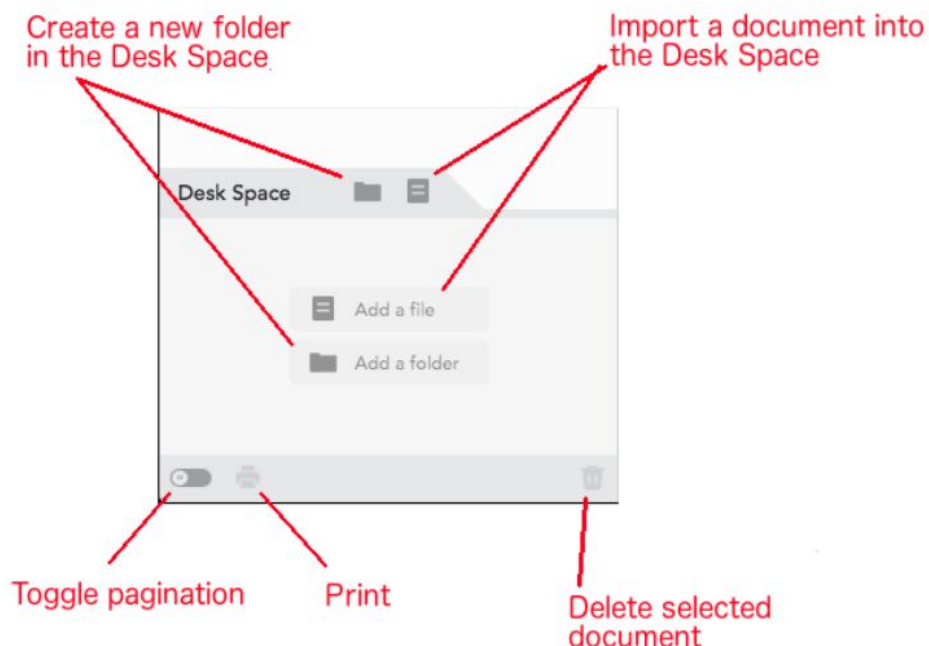
Areas

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

- **Search Box** - Search for terms in the imported Casefile of documents showing in the Document Views.
- **Index** - 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** - Newly imported documents and created folders are held here. 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. The relative size of the two Document Views can be adjusted by dragging the divider between them.
- **Purple Document View** - This is the other document view.






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.

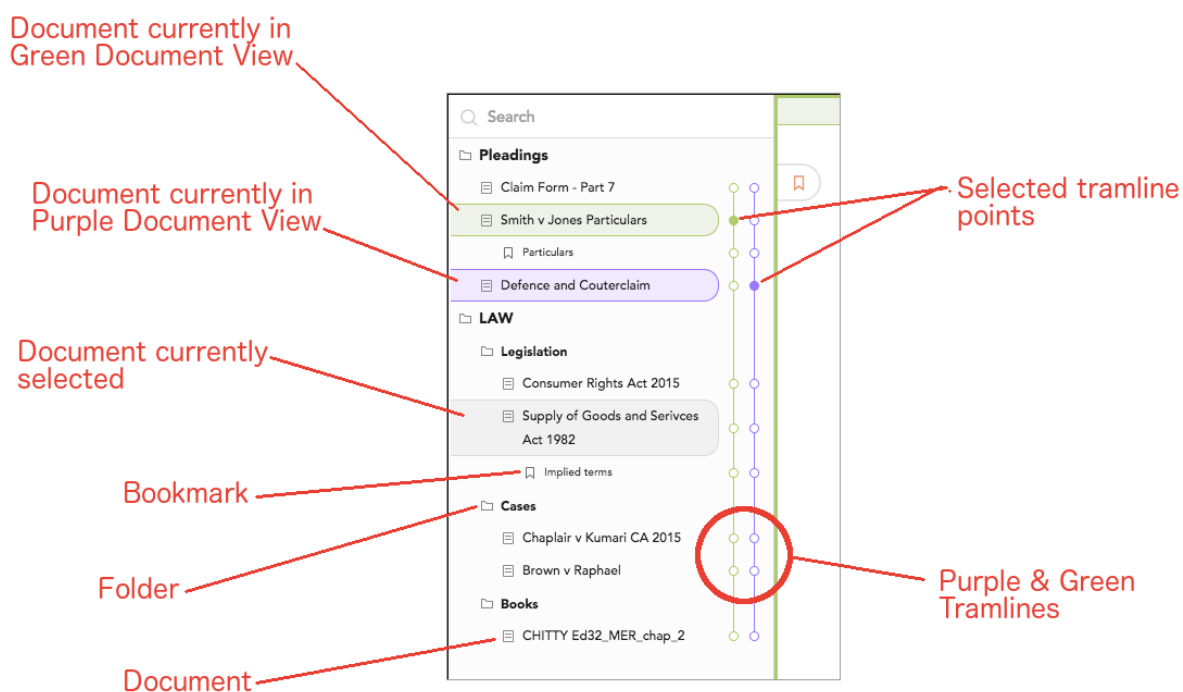
Here's a tabular summary of the buttons above:

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.

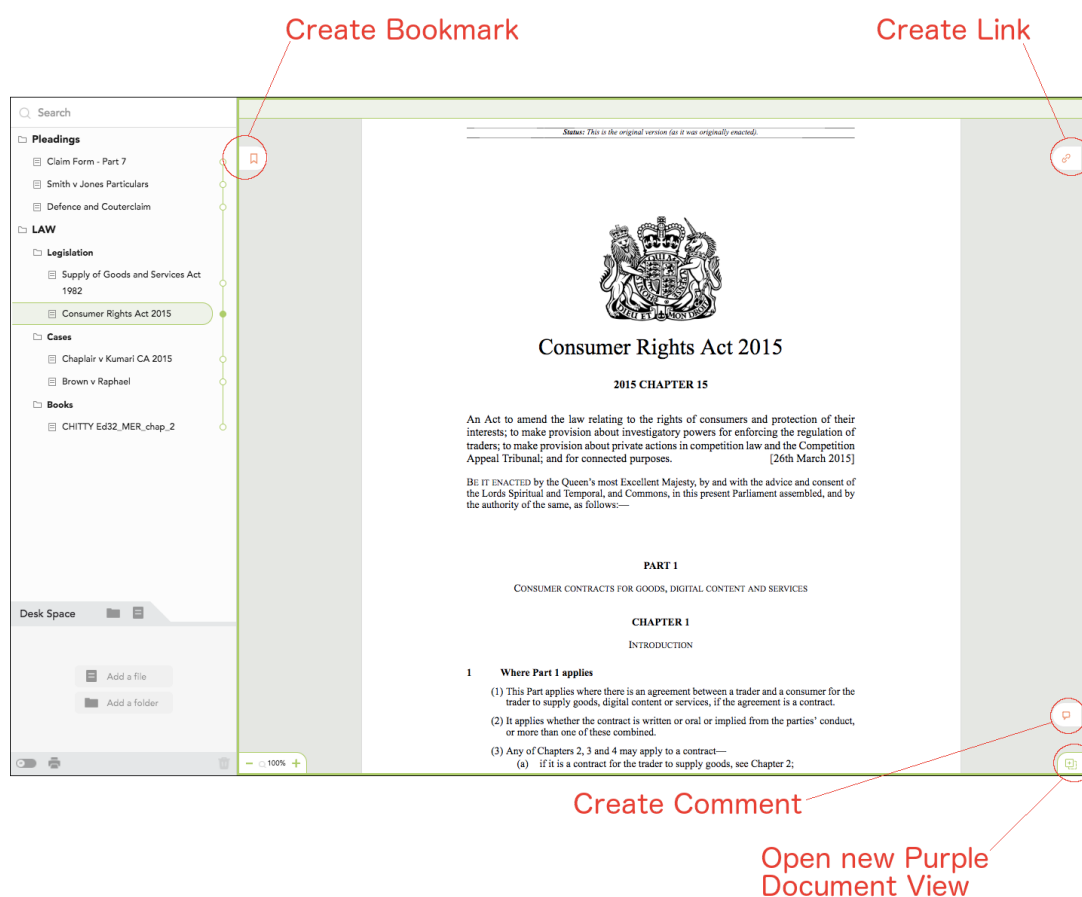
Tramlines

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.

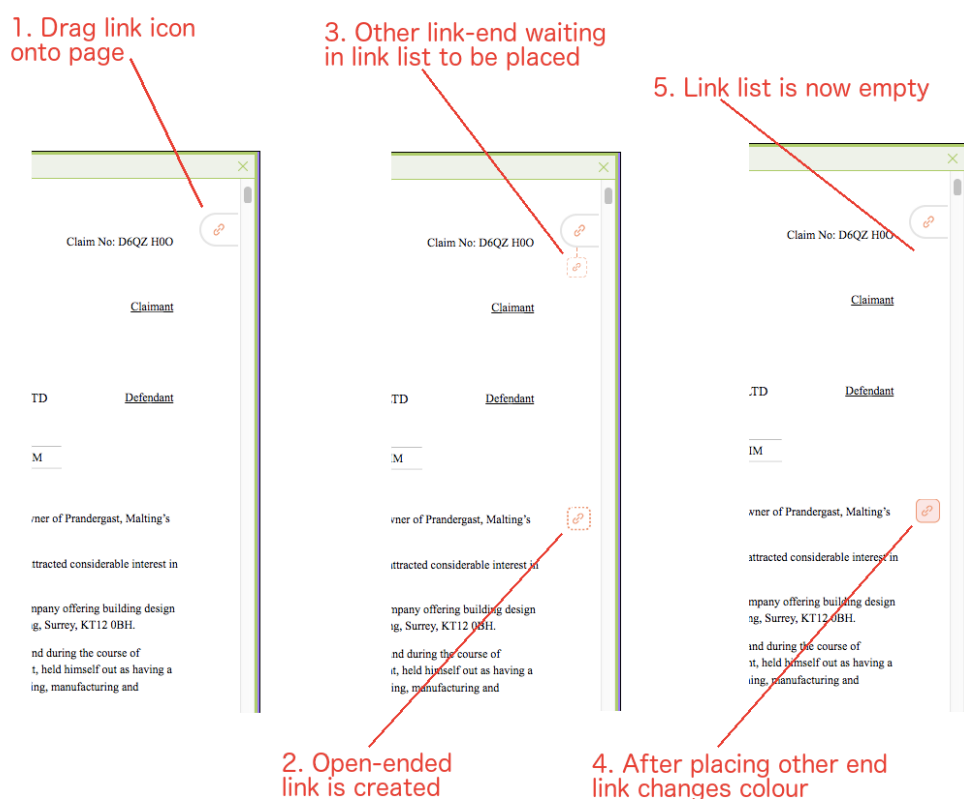
To add a bookmark, drag the bookmark icon onto the page and release. You can then name the bookmark by typing in a name. The bookmark will also appear in the Index under the document it is attached to.

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.

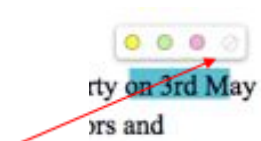
To add a comment, drag the comment icon onto the page and release. To delete a comment select the comment icon and click delete.

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:



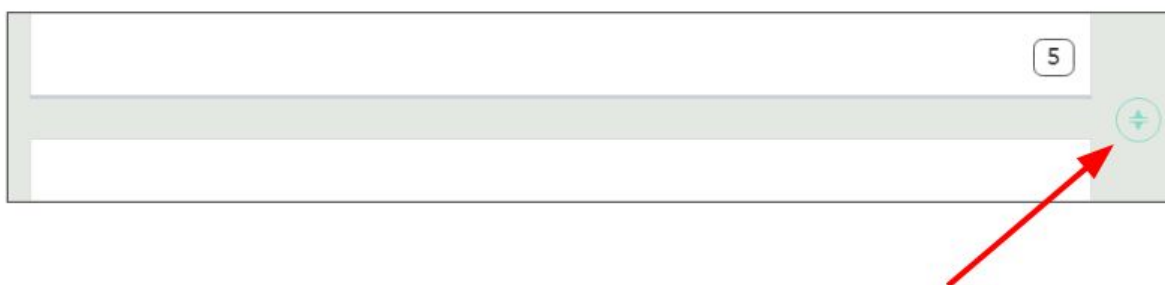
Like search, highlights only work if the pdf imported is searchable. For more information see *Preparing Documents for Casedo* below.

Splitting & Merging Documents

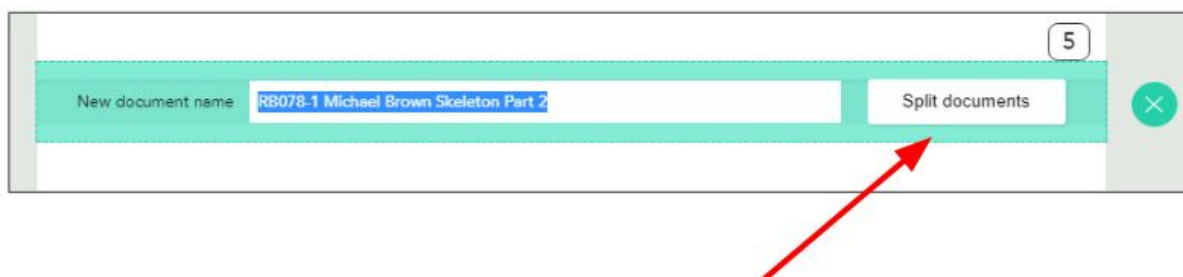
These features allow you to break apart large documents into individual sections, or to combine documents that belong together. It also allows you to remove sections of a document that are not needed by separating it off so that it can be deleted.

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.

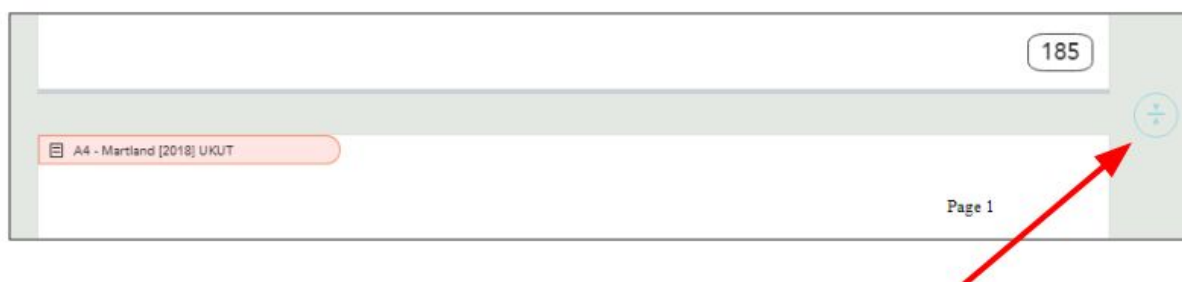


Once that has been selected, you will then be asked to confirm the split. At this point you have the option to rename the newly created document, or cancel the split altogether by clicking the cross (X) on the right hand side.

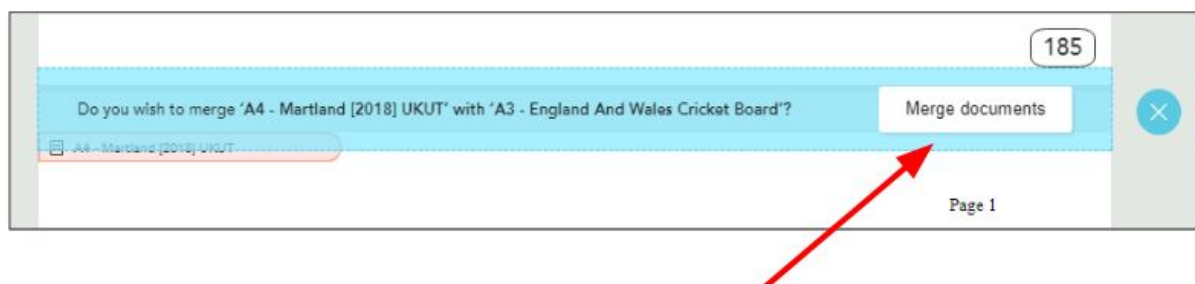


Merging Documents

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.



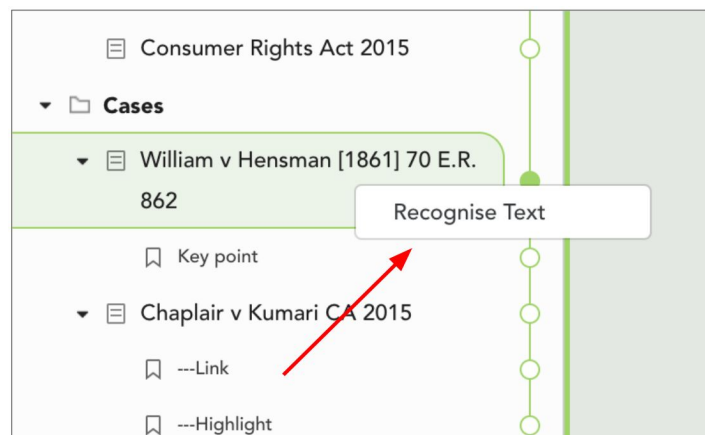
The title of the lower merged document is used as a bookmark in the new single document.

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 cancelling the operation and display a message asking you to wait a few seconds.

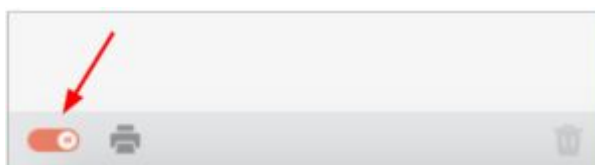
NOTE There is currently a 60 page limit for scanning documents. However, if you want to scan a longer document within Casedo, you can always use the Split feature to split the document up into lengths that can be OCR'd and then use the Merge feature to put them back together again. However, we recommend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

Go to page

The 'go to page' feature is located at the top left of each Document View. Instead of scrolling to find what you're looking for, you can use this function to easily go to any selected page in your document.

To do this:

Make sure that [pagination](#) is turned on.



At the top left of each Document View, you will see 'Go to page'



Click in the empty box next to it and type any number you want and simply click **Enter**

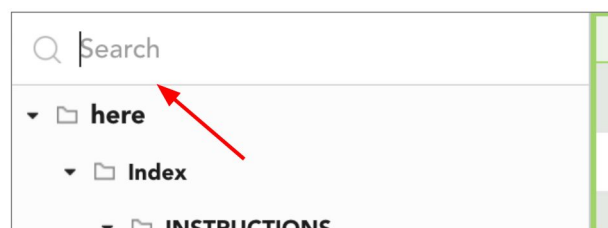
If you have both Document Views open, you can move between the **Go to page** boxes by using the **TAB** key.

Also, you can also use the keyboard shortcuts to go to any page, this is done by pressing Mac **⌘ + g**, Windows **Ctrl + g**, then simply put down the page number and press enter.

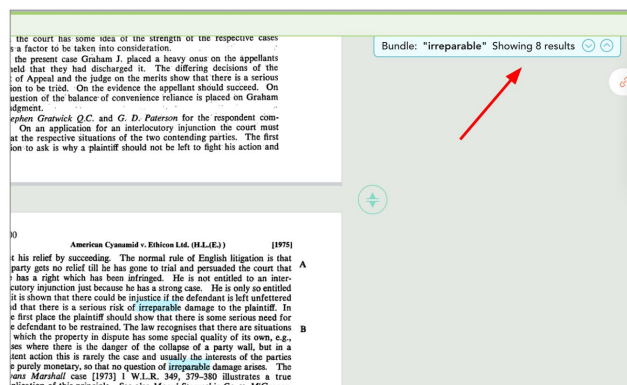
Navigation & Search

With Casedo there are different ways to find the information you are looking for, both through searching and best-practice structuring of documents in your Casefile. There are many ways in which you can use Search in Casedo for different outcomes.

Using the Search feature, located in the top left corner of the application, you can search all the documents in the Index. Type any keywords in the Search box to find any words or phrases in any of your documents.



Results will be highlighted in the document itself, while also showing the results in the top right of the Document View:



NOTE In Casedo, the Search function works by indexing the underlying text in the bundle. This means that the first time a Search is carried out, it can take time. As long as the bundle is not subsequently rearranged, searching for new terms will be very quick. However, if the bundle is rearranged, the bundle will need to be Indexed again.

TIP If in a court or similar situation, run a Search before the hearing begins, thus making any subsequent searches very quick.

Other ways to use Search

1. Searching for rare terms:

Search for a rare term such as "beneficiary loan" and tap through the results to find where that's referred to. This provides an efficient way of searching for a rare term in your document.

2. Jump quickly to a document:

Use this search feature to jump straight to any of the cases referred to in the casefile. You can easily find all related search terms for your case. Simply type the case name into the search box. This will quickly direct you to the beginning of that decision, or any other cases that have referred to that searched-for case.

3. To find the next instance of a term:

When you are in a document and you want to find a specific place. This feature makes use of the fact that search in Casedo starts in two different places. So let's say that you are in 'case A' and you type in the word 'discussion'. That will give you some results.

If you press on the up arrow, it will take you to the first result, and you don't want that. If you want all the results that are within 'case A', you can simply type in your word and press enter. This will take you not to the first page, but to the first page this word is mentioned within 'case A'. Meanwhile you could also either press the down arrow, or simply scroll through your case and look out for the highlighted terms.

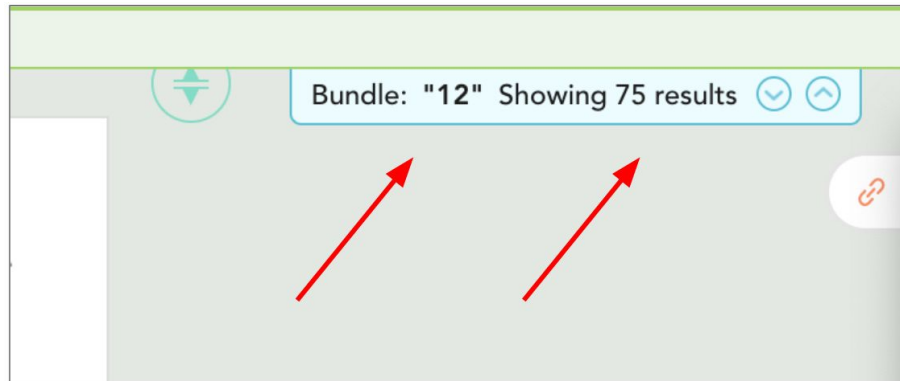
Once found, you can choose to add a bookmark to that specific section, so as to have it in your index and not have to search for it again.

4. Help you with reading your case:

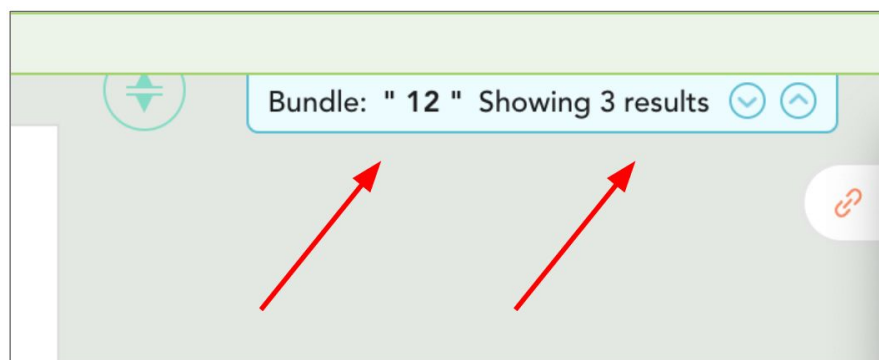
For example in 'case B', you are only interested in reading the specific part about 'reasonableness'. You might search the word 'reasonable', and as you are searching 'case B', you can read it, or you can scan through it, until you come across the part of the case where it starts to talk about 'reasonableness' by spotting the highlighted term. This allows you to scan easier through it when you are reading a longer case.

NOTE We get asked a lot if you could also add quotation marks around terms to make it specific. Answer is, you can get that effect by using space. For example let's say you want to search for the number 12. When you simply write 12 in your search box, you will

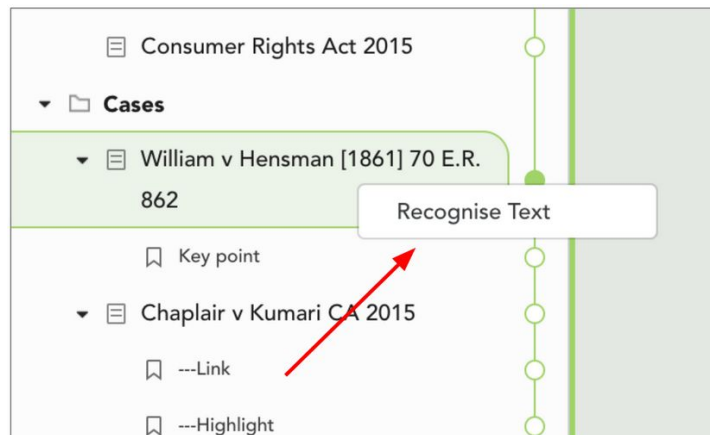
get 75 results. This will include all the numbers and dates that also includes the number 12, such as "341256" or "120".



However, if you simply add a space before and after the number 12, you will see that the results shown are decreased. Now you will only get the number which only has 12 in it, now only showing you 3 results.



NOTE Casedo can only search documents that have texts in them. If your document does not have a recognisable text, the computer can't search that document. To get around that you can use the Optical Character Recognition (OCR) function. You can do that by left click/double click on that document, and press 'recognise text'. This feature will convert the document to a searchable format. This is very useful but it can take some time.



Lastly, if you prefer to search for page number. You can't do that from the normal Search box function. But we have a specific box made just for that. The 'Go to page' feature of Casedo allows you to jump to any page you want effectively. The 'go to page' feature is located at the top left of each Document View, but only appears if pagination is enabled.



Let's say, if you search for page number 12 and enter, it will directly take you to page number 12. This is a dedicated 'go to page' function instead of actually searching for those as texts. That works even if you have inserted pages, or AB pagination, so now you can search for B14,, and that will take you straight to the page B14.

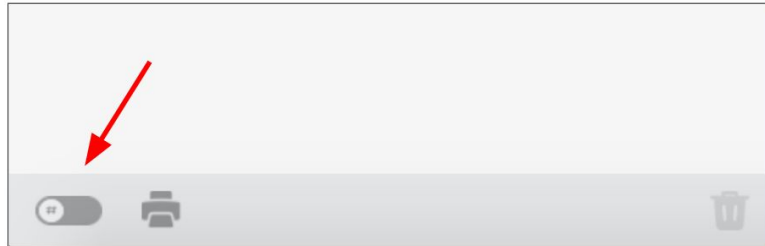
Pagination

Simple Pagination

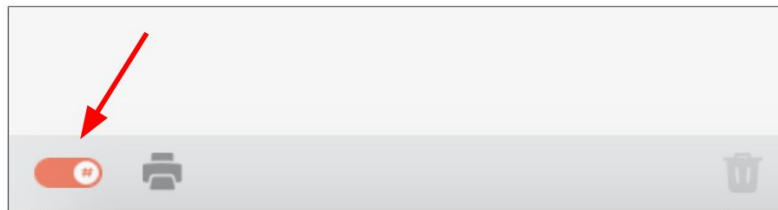
Casedo offers a pagination system where it allows you and others to navigate your casefile easily and effectively.

By turning on the pagination, Casedo numbers all of your pages according to the organisation of your documents.

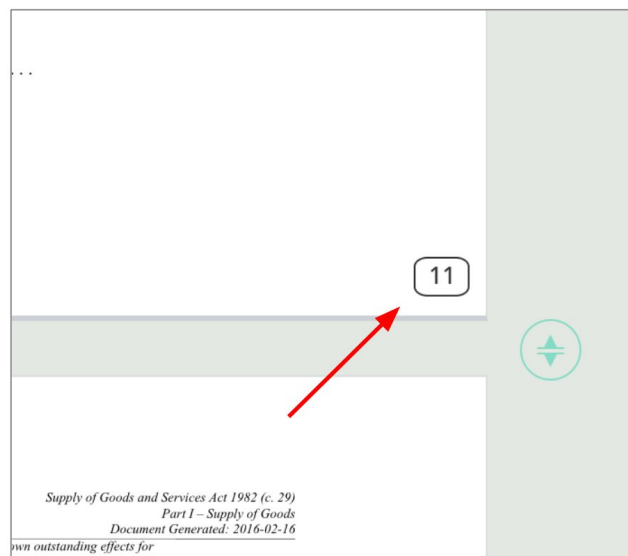
To turn on the pagination simply click on the toggle switch as shown:



After it is turned on, it should look like this:



You will now realise that your pages will all be numbered as shown:

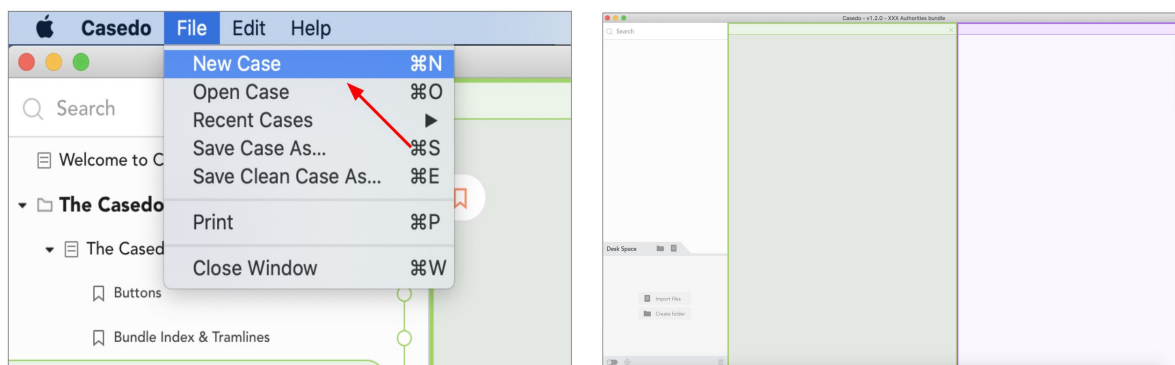


More Complex Pagination 1 - Creating a Court Bundle

To illustrate how the pagination works in Casedo, we are going to create a court bundle:

1. Create a new casefile.

Firstly create a new casefile by clicking on the new case located in the file menu on the toolbar. You can save that for example as 'XXX Authorities bundle', if that's what you want to create. You will now see that you have an empty Casedo casefile.



2. Open the Index document

Find the Index Document. This is a document (a document of authorities) which you might have been sent by a solicitor or a barrister on the other side of the case. You can import that to the top of your Casedo Index, and those will be the documents you will want to create.

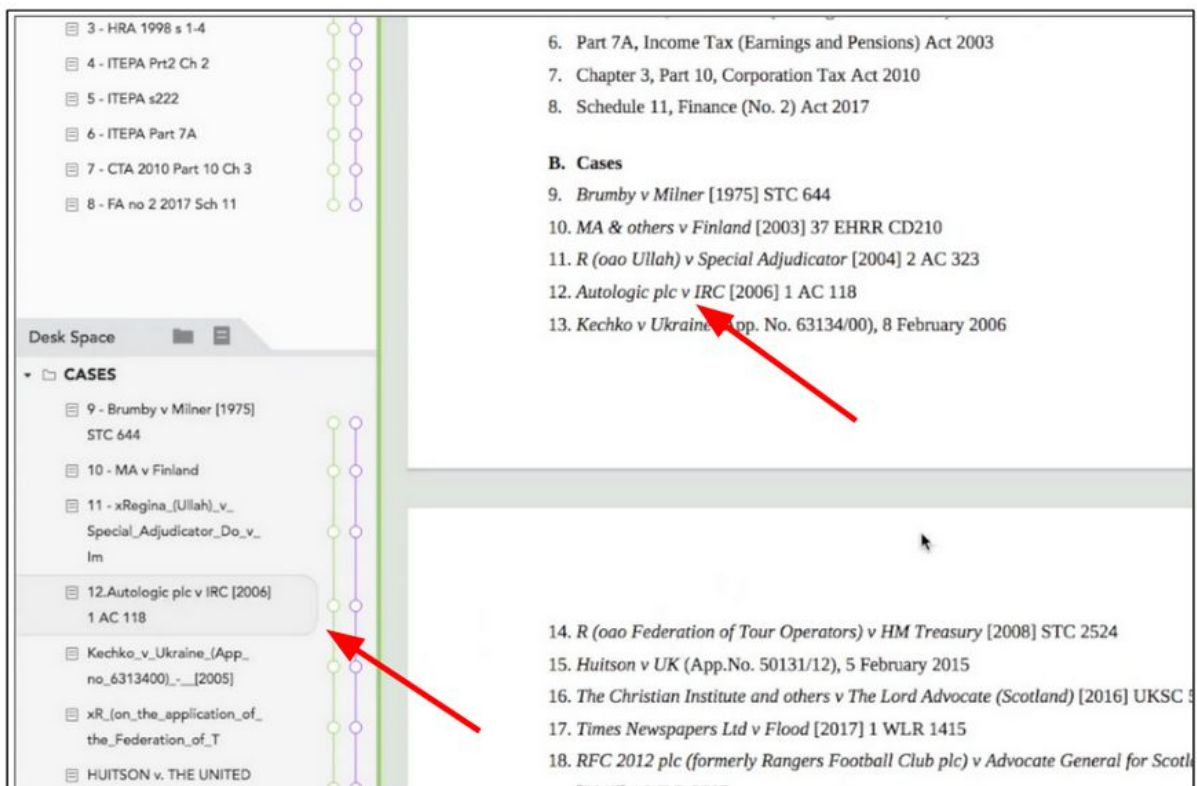
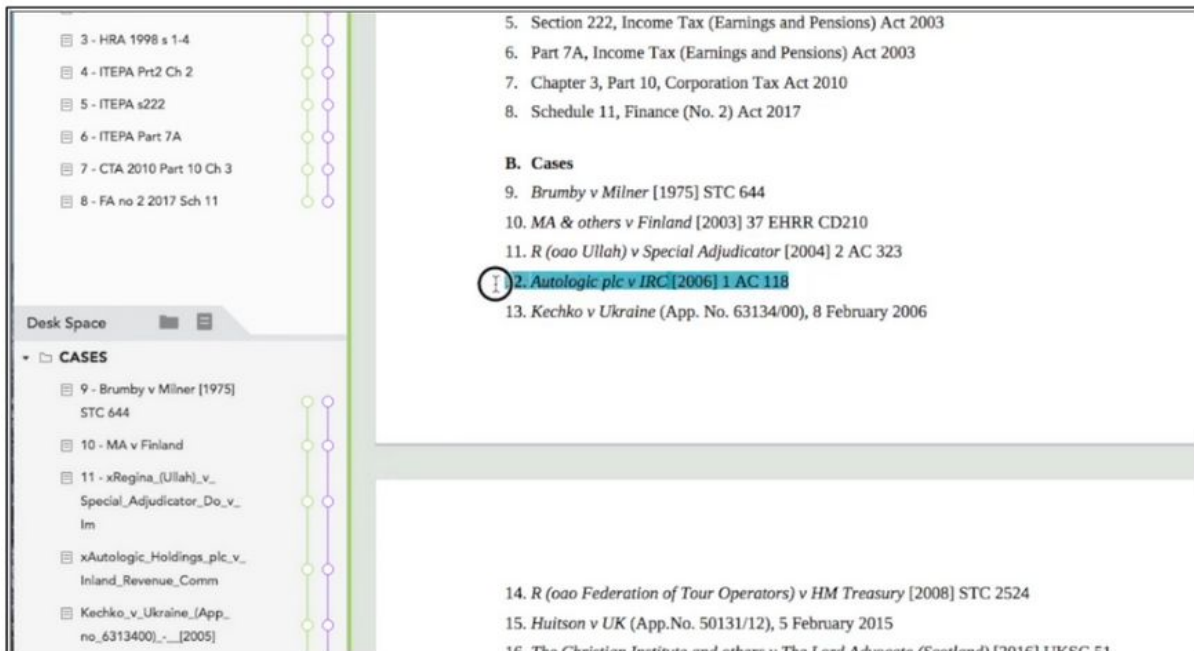
3. Import files

Next thing you want to do is import the files stated in the Index Document. After having imported all of these files, they can be organised appropriately. Dropping the cases under a "Cases" folder, and legislations under a "Legislations" folder.

4. Add tab numbers

As you go along, you can add the tab numbers to your files in the specific order your index document (Authorities bundle) tells you.

To do this simply, rename your imported folders in the same order the authorities bundle has specified. For example, if the "Autologic plc v IRC [2006] 1 AC 118" is numbered as 12, then simply rename your case in the index side as "12 - Autologic plc v IRC [2006] 1 AC 118". This will make it easier to navigate.

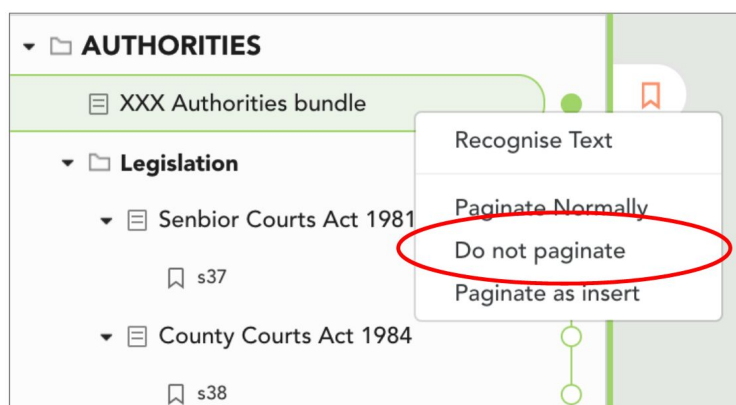


You will now see that you have a folder for all the Legislations, organised in the manner the index document states.

5. Turn on pagination

You can see that when the pagination is turned on, the numbering starts from the very first page, sometimes you might not want that. You might need your pagination to start from a specific document rather than starting from the very first page which in this case is the index document.

In order to avoid this, after having turned on pagination, right click on the index document and choose the "Do not paginate" option. As shown:



By clicking that the imported Index Document will not be paginated, and numbering will start from the page of your choice.

6. Full bundle

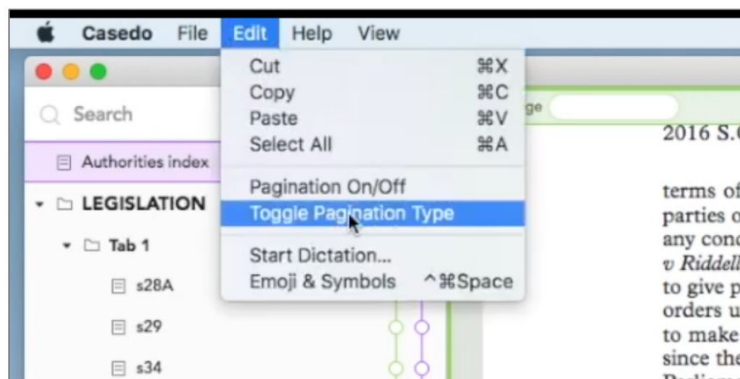
After having imported all your cases and legislations, and renamed them accordingly. You will have a complete bundle fully paginated and with pagination starting from the first legislation or tab 1, and extending all the way through. This feature will also enable you to track at what pages your cases start, or your legislation. For example, you will now know that your authorities start on page 210.

7. Print

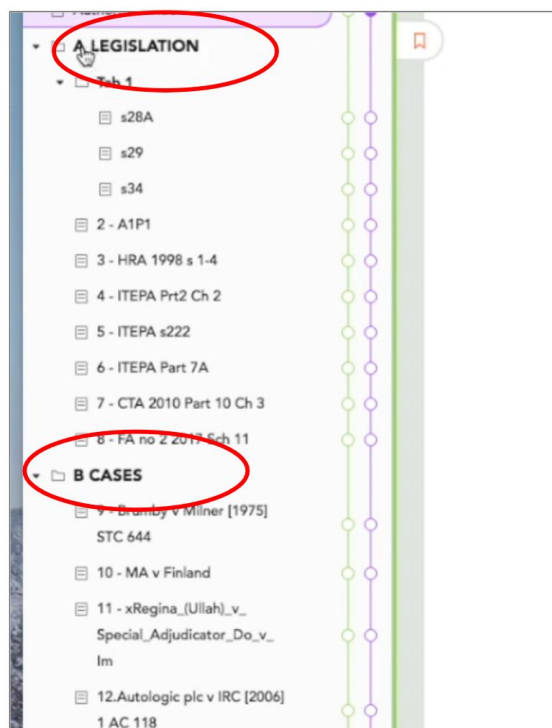
Now that your bundle is ready and paginated. You can now simply hit print, and send that to the printer, and you're done.

More Complex Pagination 2 - Separating sections of the bundle

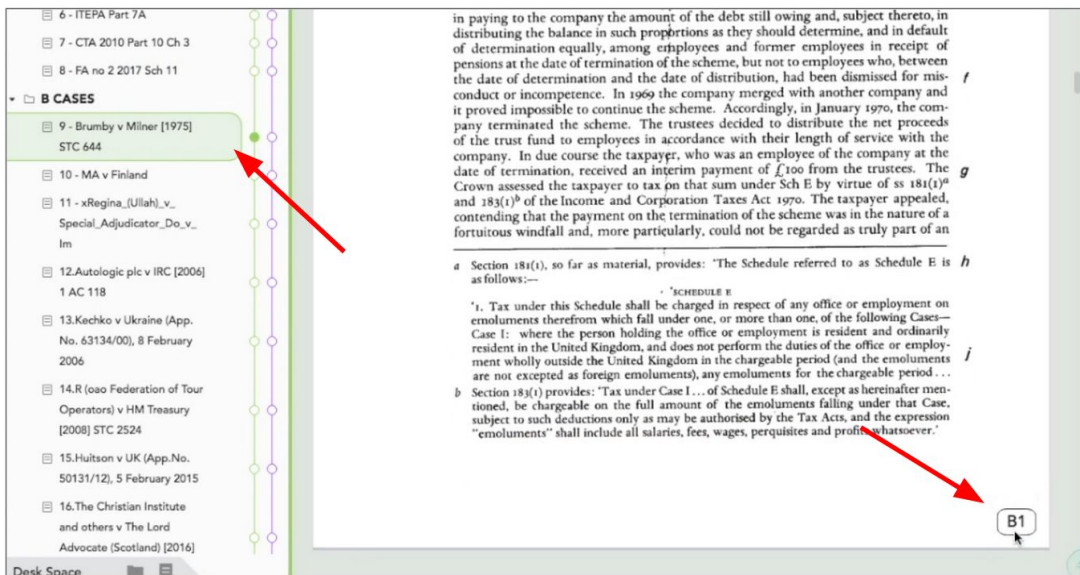
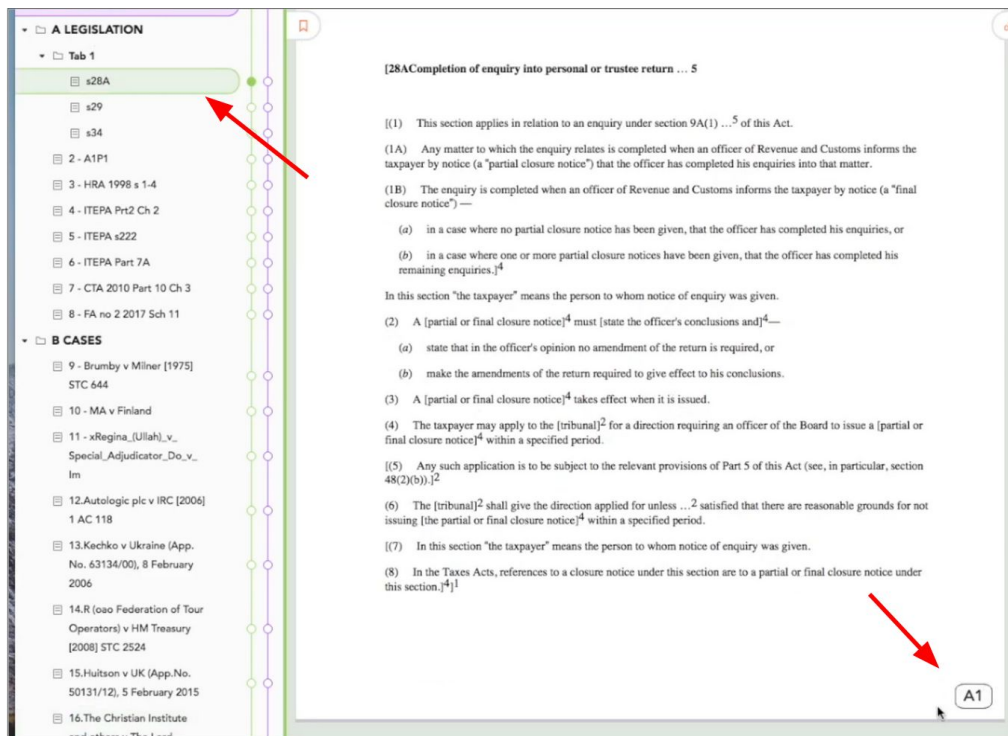
However, it is normal practise to paginate cases separately to legislation. You might want to have two separate files. For example, you might want to have a **bundle A** for legislation and a **bundle B** for cases authorities. To do that go to the main menu, select **Edit > Toggle Pagination Type'**.



This takes the top level folders and assigns them a letter, as shown below.

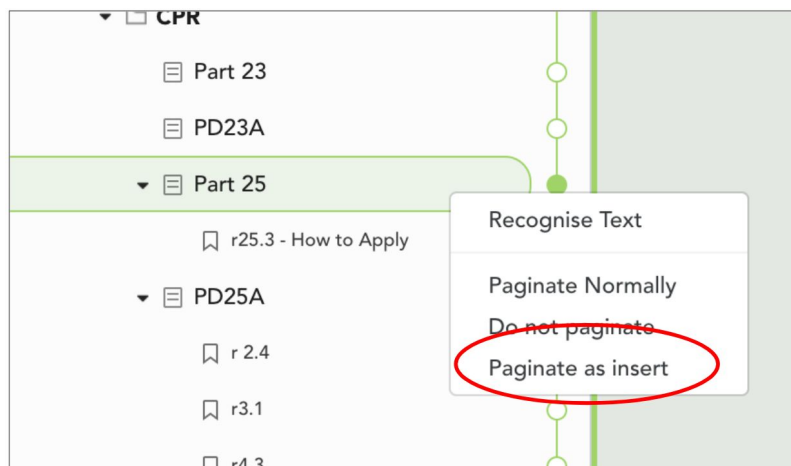


Everything in that folder separately gets assigned a prefix. For example now the content in the A folder will start from A1 and the content in the B folder will start from B1. As demonstrated below.

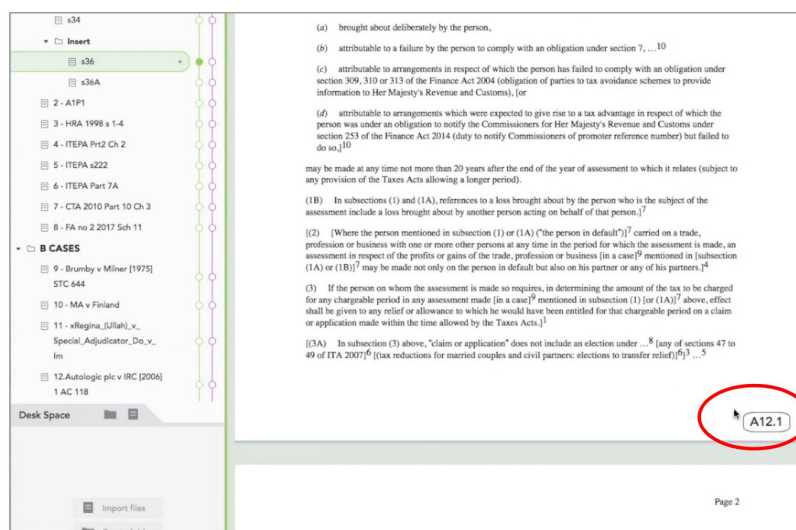


And if you no longer want that you can simply press on the 'toggle pagination type' and this will take it back to the original pagination style.

Also, If you have forgotten to add something in your casefile, it is equally as easy as correcting that mistake. Simply import your file and place it anywhere in your bundle and it will be automatically paginated. However, if you want your file to be added as an insert, meaning you don't want to upset the existing pagination, simply right click on that folder and click on **Paginate as an insert**.

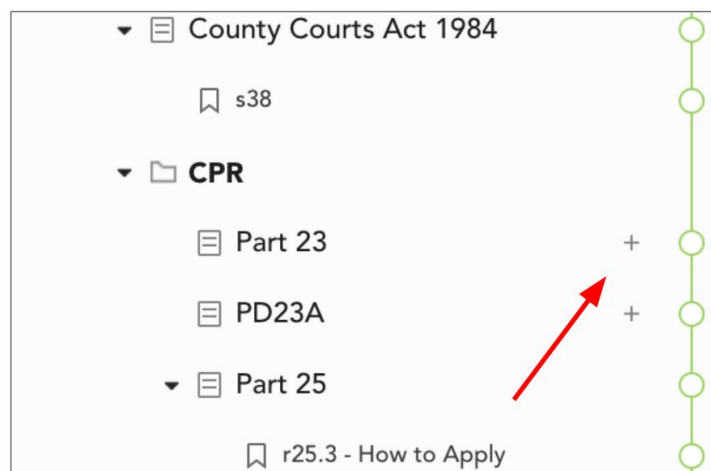


This will give this document a 'point reference' page number, for example A12.1, as shown:

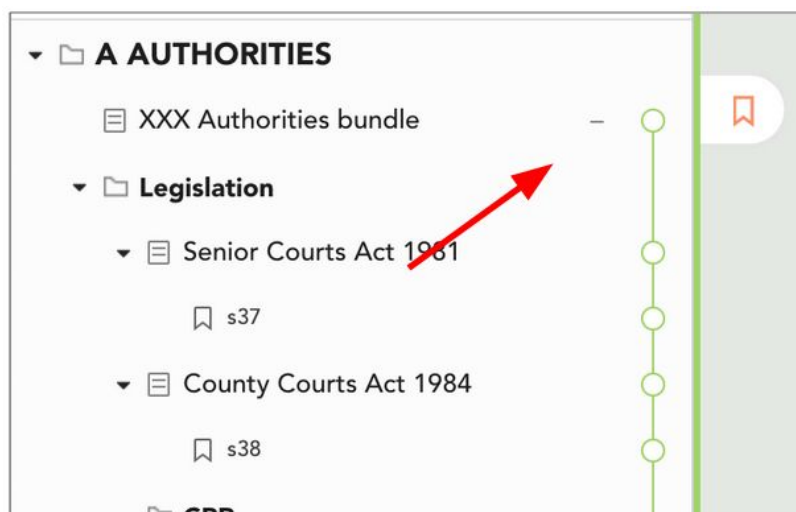


You can repeat this as many times with any other document.

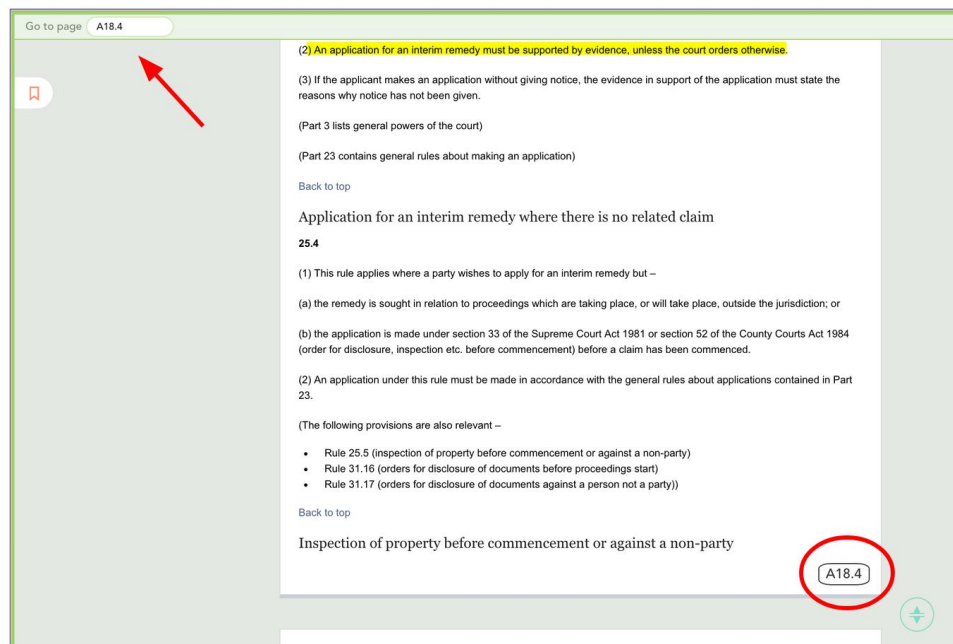
Paginated inserts are indicated by a plus sign (+) in the Index.



Similarly, an excluded document from pagination is indicated by a minus sign (-).



Casedo now also has the 'go to page' feature which allows you to go to any page very quickly without having to scroll down. You can find that at the top left of your Document View if the pagination is enabled. This feature is compatible with the pagination system we have explained above. So you can now simply type for example A18.4, and it will take you directly to that page.





You can repeat this process in both viewers of your case files separately, allowing you to quickly and efficiently be at two different parts of your casefiles at the same time.

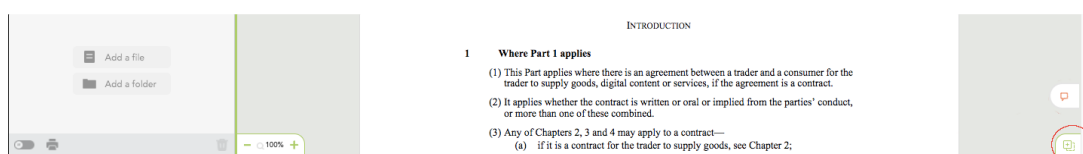
Customising the Workspace

Working with only one Document View


It is often 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.

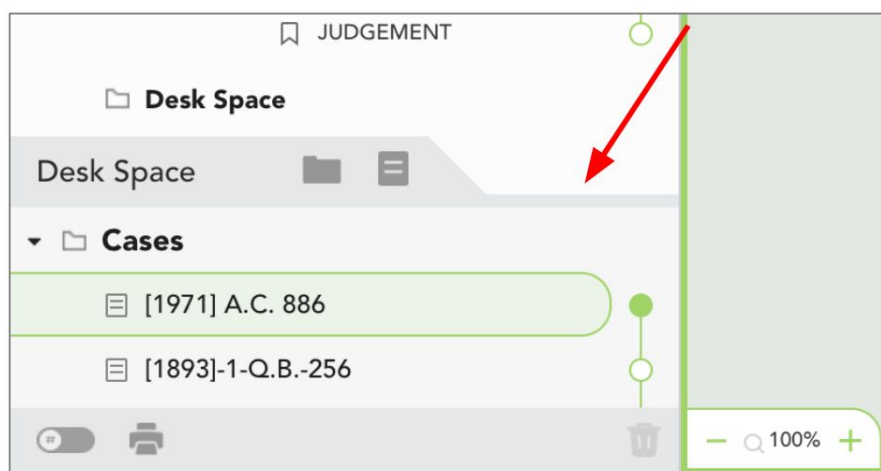
The same is also true of the Desk Space which can easily be resized in order to make it larger to view a greater number of documents.

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

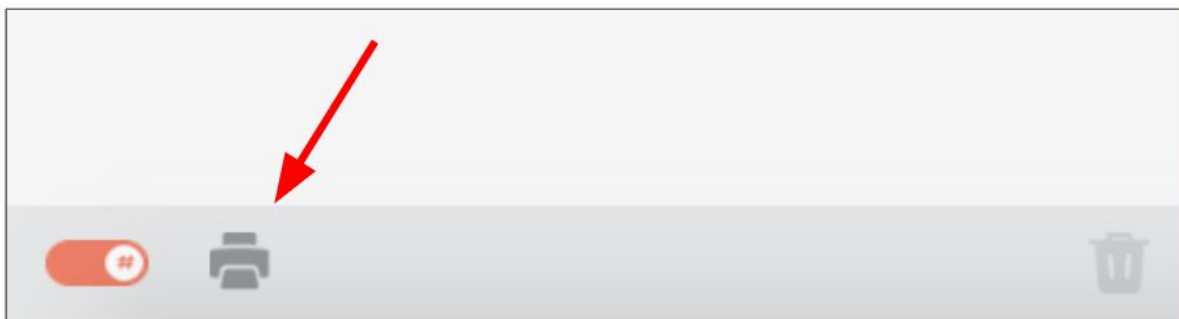


2. Then click on it, dragging it up or down accordingly.

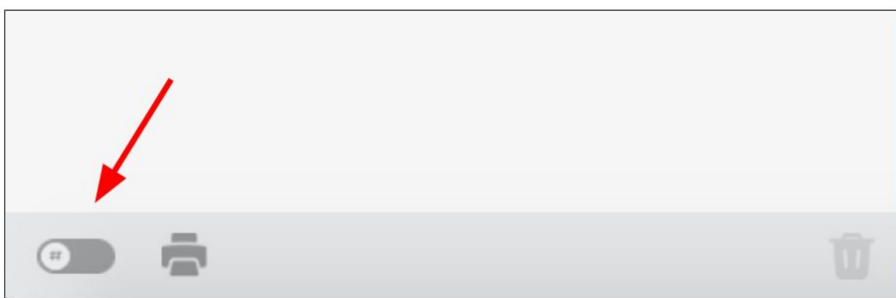
Printing from Casedo

The printing feature in Casedo is in its infancy. We've concentrated on other features as Casedo is designed to be used without printing. However, we do understand the need for printing and we're working on it.

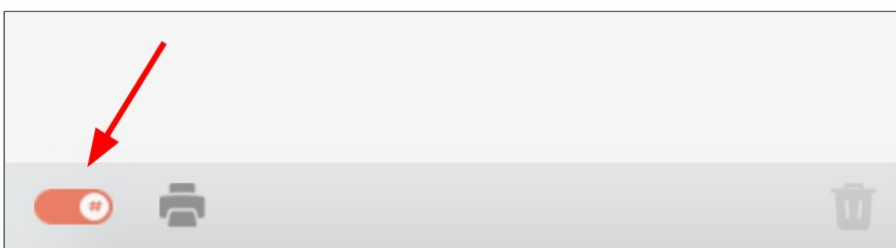
In order to print in Casedo all you have to do is simply press on the print icon located on bottom right side of your Casefile. By pressing this it will automatically start printing your pages.



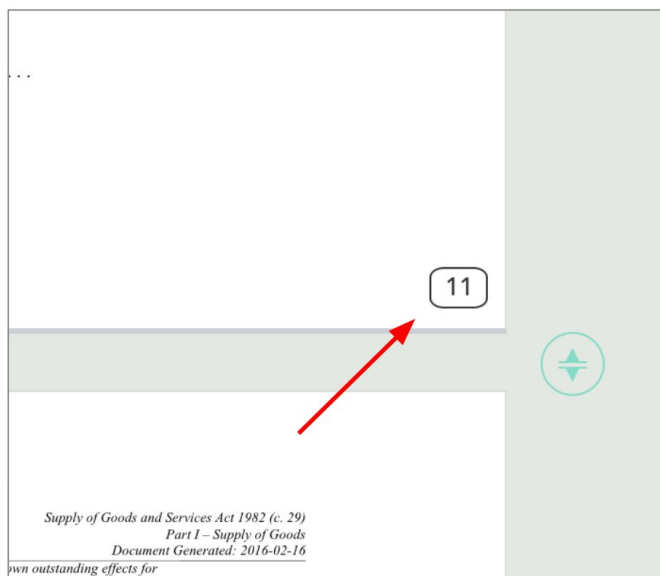
However, if you want a paginated version of your casefile before printing, simply press on the toggle switch located right next to the print icon at the bottom right side of your casefile.



Once turned on you it will turn orange.



You will see that your pages will be numbered as shown;



After turned on, simply print as normal, and this will allow all your printed documents to be paginated.

NOTE At the moment the printing feature

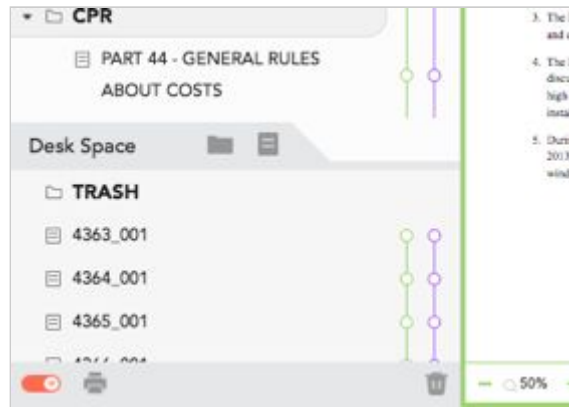
- only prints a clean pdf (ie. no comments, bookmarks or highlights)
- only prints a non-readable pdf (the underlying software scans the documents as an image)
- is resource-intensive, I have a 700-page bundle that takes around 5 minutes to process.

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.

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.

Action	Mac OS	Windows OS
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
Go to Page	⌘ + g	Ctrl + g