

CaseMap Filter and Search- Litigation Webinar

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Agenda

- Why Filter?
- Methods of Filtering
- Why Search?
- Different levels of Searching
- Training/Resources
- Q & A

Benefits of Filtering

- Cull data to generate reports
- Save filters to rerun at a later time when new information is added to the case
- Isolate a subset of records based on fields such as status, evaluation, linked issues
- Narrow a set of records for light document production

Instant Filter | Use simple filters like a key word or phrase

FACTS							29 RECORDS
Date & Time	Fact Text	Source(s)	Linked Issues	Material	Status	Evaluation	
Mon 11/25/200...	William Lang meets Philip Hawkins while touring Converse Chemical Labs plant in	Deposition of... William Lang, 25:14;	Wrongful Termination	Yes	Disputed	↘	
Thu 12/12/2002	William Lang invites Philip Hawkins to visit Anstar Biotech Industries facilities in Irvine.	InterviewNotes	Wrongful Termination	No	Prospective	↘	
Thu 01/16/2003	William Lang offers Philip Hawkins Sales Manager position at Anstar Biotech...	InterviewNotes, Email from Phil...	Retaliation	No	Undisputed	→	
Mon 01/13/2003	Philip Hawkins joins Anstar Biotech Industries as a Sales Manager.	Anstar Biotech Industries	Wrongful Termination	Yes	Undisputed	→	
Mon 12/01/2003	Philip Hawkins promoted to Anstar Biotech Industries VP of Sales.	InterviewNotes	Retaliation	No	Undisputed	↘	
Fri 01/09/2004 to Wed	Philip Hawkins negotiates <i>draft</i> Hawkins Employment Agreement with William Lang.	Hawkins Employment...	Wrongful Termination	Yes	Undisputed	↘	
Sat 02/14/2004	William Lang tells Philip Hawkins that he has changed his mind regarding the Hawkins...	Philip Hawkins, Deposition of...	Wrongful Termination	Yes	Disputed	↘	

Selection: WrongfulTermination

- Filter by Selection Ctrl+R
- Tag by Selection Ctrl+G
- Cancel Filter
- Send To
- Link Assistant Ctrl+Space
- Add Issue... Ctrl+A
- Issue Detail... Ctrl+D
- Cut Ctrl+X
- Copy Ctrl+C
- Paste Ctrl+V

FACTS							Filtered: 8 of 29
Filter: Linked Issues = "Wrongful Termination"							Cancel Save
Date & Time	Fact Text	Source(s)	Linked Issues	Material	Status	Evaluation	
Mon 11/25/200...	William Lang meets Philip Hawkins while touring Converse Chemical Labs plant in	Deposition of... William Lang, 25:14;	Wrongful Termination	Yes	Disputed by: Us	↘	
Thu 12/12/2002	William Lang invites Philip Hawkins to visit Anstar Biotech Industries facilities in Irvine.	InterviewNotes	Wrongful Termination	No	Prospective	↘	
Mon 01/13/2003	Philip Hawkins joins Anstar Biotech Industries as a Sales Manager.	Anstar Biotech Industries	Wrongful Termination	Yes	Undisputed	→	
Fri 01/09/2004 to Wed	Philip Hawkins negotiates <i>draft</i> Hawkins Employment Agreement with William Lang.	Hawkins Employment	Wrongful Termination	Yes	Undisputed	↘	
Sat 02/14/2004	William Lang tells Philip Hawkins that he has changed his mind regarding the Hawkins...	Philip Hawkins, Deposition of...	Wrongful Termination	Yes	Disputed by:	↘	
Wed 05/11/2005	Philip Hawkins receives Hawkins Performance Review from William Lang. Is	Hawkins Performance Review	Wrongful Termination, Deserved Termination	Yes	Undisputed	↘	
Mon 09/19/2005	Philip Hawkins writes letter to William Lang complaining about the way he's being	Hawkins Letter of 9/19/2005	Wrongful Termination, Hawkins Specific	Yes	Undisputed	↘	
Fri 11/11/2005	Reduction in force takes place. 55 Anstar Biotech Industries employees are let go		Wrongful Termination, Hawkins Specific	Yes	Undisputed	↘	

Guided Filter | Run pre-built filters from CaseMap or access your own saved filters

Sort & Filter

- Sort
 - Field: Linked Issues
 - Sort Ascending
 - Sort Descending
 - Advanced Sort...
- Filter
 - Filter Fact:
 - Linked to People, Documents, etc...
 - Linked to Issues
 - Containing Text
 - Added in the Last
 - Day
 - Week
 - Month
 - Three Months
 - My Saved Filters
 - Cancel Filter
 - Save Filter...
 - Advanced Filter

FACTS Filtered: 6 of 29

Filter: (What's New In Last Week) Creation Time Stamp >= 03/14/16 Cancel Save

Date & Time	Creation Time Stamp	Fact Text	Source(s)
Sat 03/06/2004	3/21/2016 9:44:11 AM	Susan Sheridan has dinner with Linda Collins and	Deposition of Linda Collins, 33:15.
07/??/2005	3/18/2016 9:44:11 AM	Susan Sheridan is terminated.	Deposition of Philip Hawkins
Mon 07/04/2005	3/21/2016 9:44:11 AM	Philip Hawkins allegedly makes derogatory remarks	InterviewNotes
Fri 08/12/2005	3/21/2016 9:44:11 AM	Frank Varvaro has lunch with Philip Hawkins.	Deposition of Philip Hawkins, 52:3-14
Wed 12/14/2005	3/18/2016 9:44:11 AM	Philip Hawkins turns down job offer from Converse Chemical.	Rumor William Lang heard
01/??/2006	3/18/2016 9:44:11 AM	Philip Hawkins meets with Susan Sheridan	Rumor William Lang heard

Advanced Filter | Construct and save multi-level filters using operators to narrow results as well as edit/save complex filter

FACTS
Filtered: 4 of 29

Filter: (Evaluation-against us) Evaluation = Against and Linked Issues = Wrongful Termination and Material = Yes
 Cancel Save

Creation Time Stamp	Fact Text	Source(s)	Linked Issues	Material	Status	Evaluation
5/13/2006 4:26:37 PM	William Lang meets Philip Hawkins while touring	Deposition of William Lang, 25:14;	Wrongful Termination	Yes	Disputed by: Us	↘
5/13/2006 4:26:37 PM	Philip Hawkins negotiates draft Hawkins...	Hawkins Employment Agreement.	Wrongful Termination	Yes	Undisputed	↘
5/13/2006 4:26:37 PM	William Lang tells Philip Hawkins that he has	Philip Hawkins, Deposition of William..	Wrongful Termination	Yes	Disputed by:	↘
5/13/2006 4:26:37 PM	Philip Hawkins writes letter to William Lang	Hawkins Letter of... 9/19/2005	Wrongful Termination, Hawkins Specific	Yes	Undisputed	↘

ADVANCED FILTER: FACT

Edit

Filter: Evaluation-against us
 ... Evaluation = Against
 ... and Linked Issues = Wrongful Termination
 ... and Material = Yes

Tag: (None)

NEW FILTER | **SAVED FILTERS**

Filter Field/Area:
 Last Update Time Stamp
 Linked Issues
 Material
 Potential Source(s)

Filter Tag

(Blank)
 No
 Unsure
 Yes

Benefits of Searching

- Quickly search across spreadsheets, linked files, and annotation notes
- Locate all instances or “hits” of search terms
- Isolate a subset of records based on key words or phrases for reporting or document production
- Construct queries for stronger and precise search results

Basic Search | Perform single word searches

SEARCH RESULTS <

Search ^

✖

Narrow Results ^

Spreadsheet Field ... (30)

Linked File Text Hits (4)

Annotation Note Hits (2)

Results ^

- 📅 Facts (13)
- 👤 Persons (1)
- 📄 Documents (15)
- 🏛️ Proceedings (1)

Resources ^

- 📄 Search ReportBook...
- 📄 Linked File Text Hits Report...
- 🏛️ Review Linked File Hits...

➡ CASE SHORTCUTS

🔍 SEARCH RESULTS

FACTS (Search Results) 13 RECORDS							
Date & Time ^	Fact Text ↗	Source(s) ↗	Linked Issues ↗	Status +	Evaluation	Material +	
Mon 11/25/200...	William Lang meets Philip Hawkins while touring	Deposition of William Lang, 25:14;	Wrongful Termination	Disputed b	↘	Yes	
Thu 12/12/2002	William Lang invites Philip Hawkins to visit Anstar...	InterviewNotes	Wrongful Termination	Prospective	↘	No	
Thu 01/16/2003	William Lang offers Philip Hawkins Sales Manager	InterviewNotes, Email from Phil Hawkins at...	Retaliation	Undisputed	➡	Yes	
Fri 01/09/2004 to Wed	Philip Hawkins negotiates draft Hawkins Employment...	Hawkins Employment Agreement	Wrongful Termination	Undisputed	↘	Yes	
Sat 02/14/2004	William Lang tells Philip Hawkins that he has	Philip Hawkins, Deposition of William...	Wrongful Termination	Disputed by:	↘	Yes	
Wed 05/11/2005	Philip Hawkins receives Hawkins Performance Review	Hawkins Performance Review	Wrongful Termination, Deserved Termination	Undisputed	↘	Yes	
Wed 06/22/2005	William Lang makes decision to reduce size of staff.	Deposition of Karen Thomas 43:19	Hawkins Specific	Disputed by: Us	↘	Yes	
Tue 08/02/2005 #1	Philip Hawkins and William Lang meet.	????	Hawkins Specific	Undisputed	➡	Unsure	
Tue 08/02/2005 #2	Philip Hawkins alleges that William Lang tells him "The	Complaint, p. 8; Deposition of Philip...	Hawkins Specific, Demotion	Disputed by: Us	↘	Yes	
Mon 09/19/2005	Philip Hawkins writes letter to William Lang complaining	Hawkins Letter of 9/19/2005	Wrongful Termination, Hawkins Specific	Undisputed	↘	Yes	
Tue 09/27/2005	William Lang meets with Frank Varvaro regarding RIF	Deposition of William Lang, 101:14	Age Discrimination	Disputed by: Us	◆	No	
Wed 12/14/2005	Philip Hawkins turns down job offer from Converse...	Rumor William Lang heard	Failure to Mitigate	Prospective	➡	Yes	

Full-Text Search | Perform searches with two or more search terms or phrases that gain stronger, precise search results

The screenshot displays a search results interface. On the left, a search bar contains the query 'lang and sheridan'. Below it, the 'Narrow Results' section shows three filters: 'Spreadsheet Field Hits' (checked, 1), 'Linked File Text Hits' (unchecked, 0), and 'Annotation Note Hits' (unchecked, 0). The 'Results' section shows one result: 'Facts' (1).

The main results table is titled 'FACTS (Search Results)' and shows '1 RECORD'. The table has the following columns: Date & Time, Fact Text, Source(s), Linked Issues, Status, and Evaluation. The single record is as follows:

Date & Time	Fact Text	Source(s)	Linked Issues	Status	Evaluation
01/16/06	Philip Hawkins meets with Susan Sheridan	Rumor William Lang heard	Age Discrimination	Prospective	→

Create queries from different operators: Boolean, Context, Proximity, Wildcards

Context Search | Search at the field level to identify relevant records

SEARCH RESULTS <

Search ^

"fact text" contains lang ✕

Narrow Results ^

- Spreadsheet Field Hits (11)
- Linked File Text Hits (0)
- Annotation Note Hits (0)

Results ^

- Facts (11)**

Resources ^

- Search ReportBook...
- Linked File Text Hits Report...
- Review Linked File Hits...

.....

↩ CASE SHORTCUTS

🔍 SEARCH RESULTS

Full Text Search ✕

Terms **Spreadsheets**

Search Text:

"fact text" contains lang

Recent Searches:

_____ ▾

OK Cancel

Live Demonstration

Training | LexisNexis University

<https://www.lexisnexis.com/university/>

Email: LNTraining@lexisnexis.com

Phone: 1-800-227-9597 x1252111

CaseMap Answer Center

<http://help.lexisnexis.com/litigation/ac/cm/cm12/index.html?welcome.htm>

Search Operator Table

http://help.lexisnexis.com/litigation/ac/cm/cm12/index.html?cm_search_operators_using.htm

CaseMap Technical Support

- Email: casemap.support@lexisnexis.com
- Phone: 1-800-833-3346 (option 3)
- Hours: Monday-Friday, 9:00 a.m. to 9:00 p.m. Eastern Time



Q & A
