CaseMap Filter and Search- Litigation Webinar

Elaine Igama | March 23, 2016





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



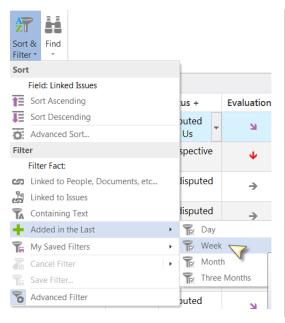
Instant Filter Use simple filters like a key word or phrase

L.C.	FACTS								29 RECORDS
	Date & Time	Fact Text 🖘	Source(s) ಆಾ	Linked	Issu	es ഗ	Material +	Status +	Evaluation
0	Mon 11/25/2002	William Lang meets Philip Hawkins while touring Converse Chemical Labs plant in	Deposition of William Lang, 25:14;	Wrong	fulTe	ermination :	Yes ngfulTerminat	Disputed to Us	71 -
	Thu 12/12/2002	William Lang invites Philip Hawkins to visit Anstar Biotech Industries facilities in Irvine.	InterviewNotes	Wrong		<u>Filter by Selection</u>		ospective	•
0	Thu 01/16/2003	William Lang offers Philip Hawkins Sales Manager position at Anstar Biotech	InterviewNotes, Email from Phil	Retaliat	415	<u>C</u> ancel Filter		ndisputed	→
	Mon 01/13/2003	Philip Hawkins joins Anstar Biotech Industries as a Sales Manager.	Anstar Biotech Industries	Wrong	_	Send To Link Assistant	Ctrl+Space	ndisputed	→
	Mon 12/01/2003	Philip Hawkins promoted to Anstar Biotech Industries VP of Sales.	InterviewNotes	Retaliat	ia R	Add <u>I</u> ssue Issue <u>D</u> etail	Ctrl+A Ctrl+D	ndisputed	Ä
0	Fri 01/09/2004 to Wed	Philip Hawkins negotiates <i>draft</i> Hawkins Employment Agreement with William Lang.	Hawkins Employment	Wrong	<u>‰</u> ሮት	C <u>u</u> t C <u>o</u> py	Ctrl+X Ctrl+C	ndisputed	Ä
0	Sat 02/14/2004	William Lang tells Philip Hawkins that he has changed his mind regarding the <u>Hawkins</u>	Philip Hawkins, Deposition of	Wrong	Ē	<u>P</u> aste	Ctrl+V	sputed by:	7





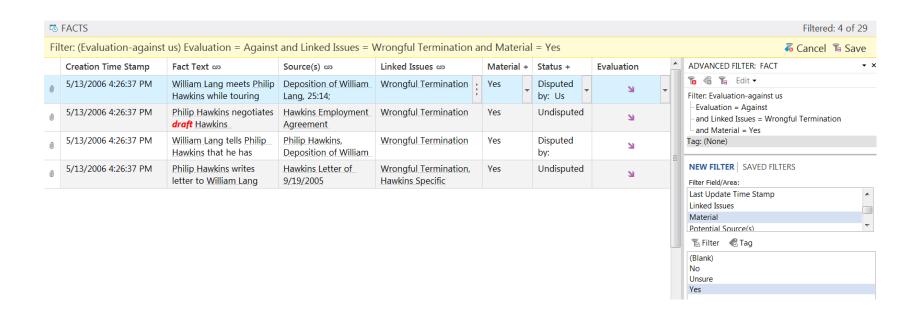
Guided Filter | Run pre-built filters from CaseMap or access your own saved filters



ĽĠ	FACTS			Filtered: 6 of 29					
Fil	ter: (What's New)	What's New In Last Week) Creation Time Stamp >= 03/14/16							
	Date & Time 🔺	Creation Time Stamp	Fact Text 🖙	Source(s) ಆಾ					
	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



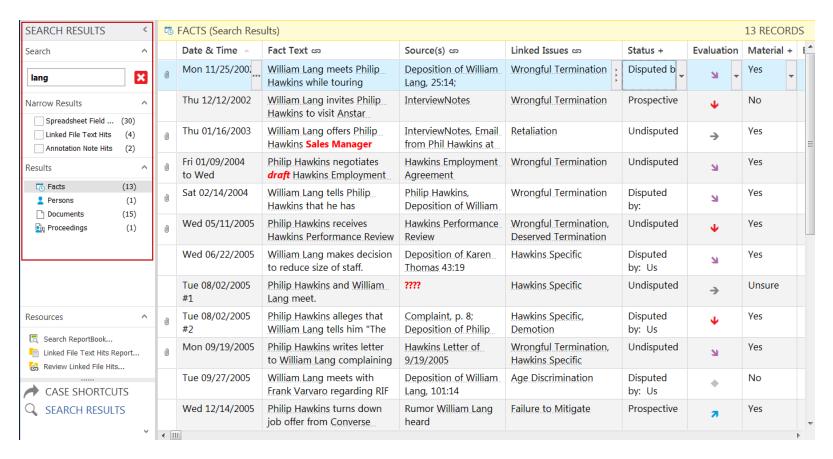


Benefits of Searching

- 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

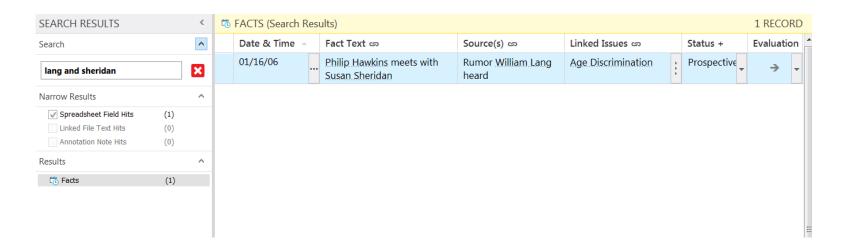


Basic Search | Perform single word searches





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

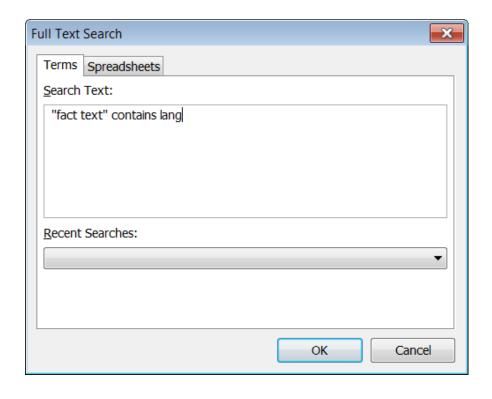


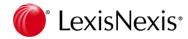
Create queries from different operators: Boolean, Context, Proximity, Wildcards



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







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

