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## About CaseMap

#





## What's New in CaseMap

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rather than automatically displaying in the DocManager file viewer. To automatically view linked files in the native application, click Tools, then click Options and then clear the Open Linked Files in DocManager check box.



The Batch Print Wizard also provides the ability to apply Bates stamps to documents included in the printed output. Various Bates stamp settings allow for customizing the Bates number, the stamp style, and its placement on the printed document.

For more information, see [Batch printing linked documents](#).





## Using CaseMap



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 [To change the Navigation pane display](#)









## CaseMap Toolbar Buttons

	Name	Use
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## About CaseMap menus

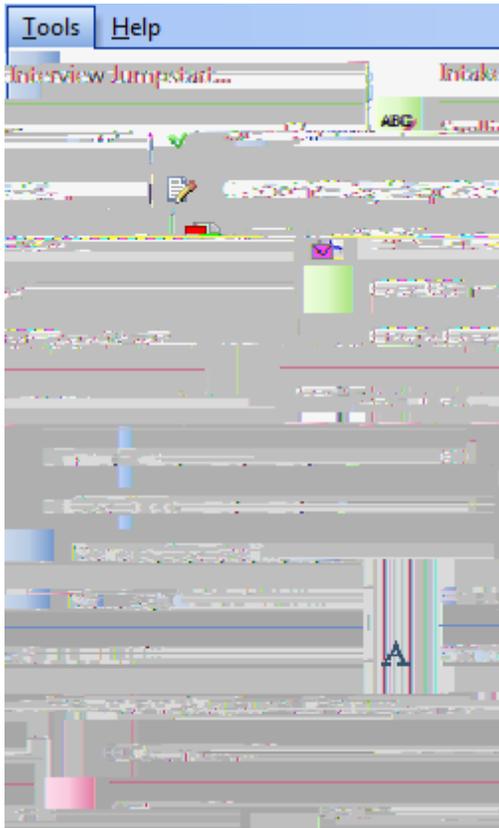
CaseMap's Menu bar is located at the top left of the CaseMap screen, just below the



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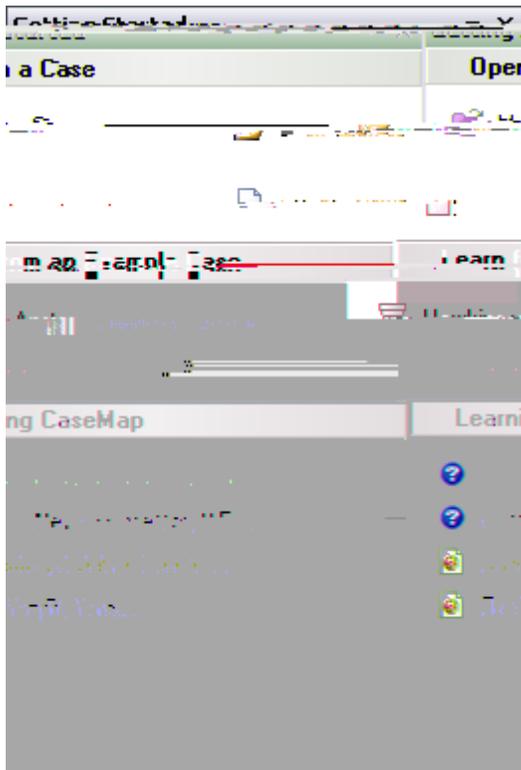




2.0 To the Customize dialog box, click the Options tab. 153-065-12350789902-100569(0)408



If you have closed this interactive window, you can still open it from the Getting Started pankdo fB^"#4F#





*HA Y'E i JW' FYZYfYbW' 7UfX\ Y'dg'mci 'Xc'lc' h'Y'& ``ck ]b[.*

- Create a basic case file
- Create a Cast of Characters
- Enter case issues
- Import data into a case file
- Analyze case data
- Search case data
- View documents and files in the DocManager viewer
- Print standard reports and ReportBooks

Related Topics

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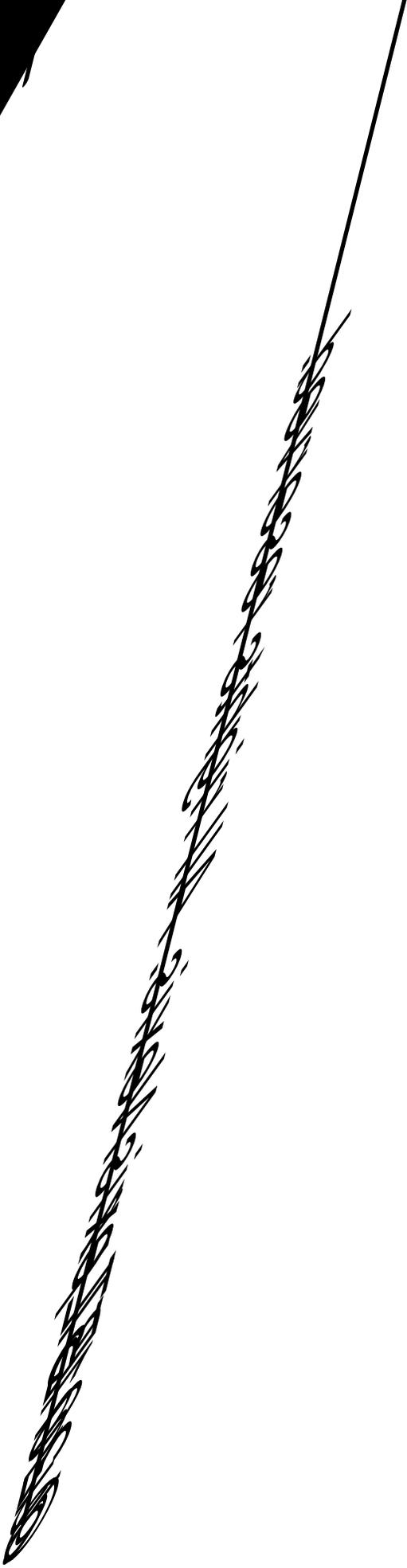








time, or to change the date format (mm/dd/yyyy), select Options on the Tools menu, and



For more information, [About facts2](#) and [Entering facts](#).



Filter feature to run most filters7 Or use Guided Filter on the Records > Filter menu7 CaseMap

For more information, see [About full-text searches](#), [Using search operators](#), and [Running full-text searches](#).

To learn more about searching, see [About searching](#).

 [Using # fields](#)







- If you are working in a SQL case and a menu item is grayed out, you may not have permission to use that feature. Contact your system administrator for more information.

#### To open a local case

1. On the **File** menu, click **Open Local Case**.

If you do not have CaseMap Server, then this option will be File > Open.

2. In the **Open Local Case** dialog box, browse to the network folder to locate the case you want to open and double-click on it.
3. In the **Case Log On** dialog box, select your user ID from the **Staff Member** list.

If only one user is added to a case, the Case Log On dialog box does not display.

If you are logging on as a scribe, select the author for whom you are entering case information. See [About adding users](#).













information.

Related Topics

[About cases](#)

[Creating cases](#)

## About cases

Before you can start working in CaseMap, you first need to create a case to store information regarding the matter. Cases are actually databases designed to help you organize and analyze

Case staff will need a CaseMap license and have the software installed on their desktop. To access cases assigned to them, case staff need to be added as users in each case as well as

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Passwords automatically default to blank, so you can type in a password, verify it, and then click OK to save it. We strongly recommend that you encourage all local case uses to set passwords the first time they logon. Cases are saved in network directly folders to ensure that multiple users can access the case. You can further protect the local cases by setting user access permissions to folders that contain case information.



Related Topics

[Before creating cas7](#)

Related Topics



When you create a template from an existing case, users and fields import into the new template structure. You can then use options in the Template Wizard to determine what facts, objects, issues, questions, and research fields you want to reserve in the new template.

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If you don't want the wizard to launch each time a new case is created, clear the Show when opening a new case check box.

Related Topics

Before creating casesre W n 1.3333333 0 0 1.3333 0 75 410.13642 Tmhm [(©)10fore rA(e)



5. Click **OK** to navigate to the new location of the linked files, then click **OK** again.
6. In the **Browse For Folder** box, navigate to the new folder location, then click **OK**.
7. Verify the old path and new path locations for the case, then click **Yes** to run the utility.

When the process is complete a message box displays the number of linked files updated successfully.

8. Click **OK** to close the utility.

Related Topics

- [Copying cases](#)
- [Deleting cases](#)

### Deleting cases

ES: If you need to delete cases, click the **Delete** button in the **CaseMap** utility. **Deleting cases**









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## ***Working with Spreadsheets and Fields***

### **About spreadsheets**

The spreadsheet pane is where case data is displayed. CaseMap has five main spreadsheets: Facts, All Objects, Issues, Questions, and Research. The All Objects spreadsheet has 11 sub-level spreadsheets where you can analyze specific object information by type. Research is actually broken into three spreadsheets that display authority and extract information in different views.

Each spreadsheet title displays at the top left of the pane with the total number of records included to the far right. Use the scroll bars to the right and bottom of spreadsheets to access additional field information.

Each CaseMap spreadsheet contains various fields to accommodate the type of information you need to track. The fields most often used automatically display when you open each spreadsheet. A list of hidden fields is accessible any time you want to track and analyze more information. You may also choose to hide fields from view that aren't being used or to create a specific spreadsheet view in preparation for creating a report.

#### [Review the five main spreadsheets](#)

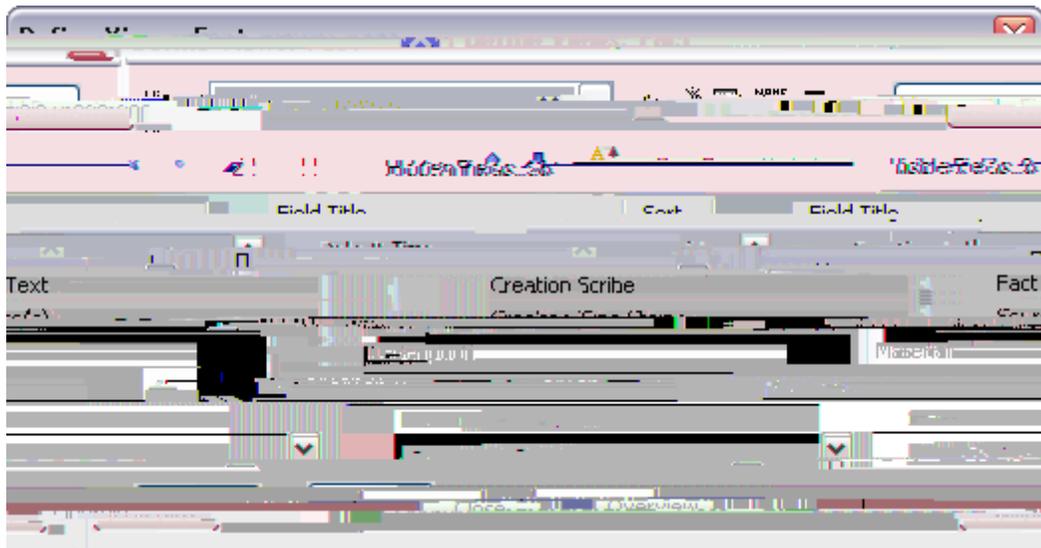
CaseMap has five main spreadsheets that will contain your case information. Only three of these spreadsheet icons display in the Case Shortcuts pane's Favorites pane: Facts, All Objects, Imack. Tllm60(r)10(m)56(a)-66(t)-244(s)-62( )19(i)2k ath resoese spreadsheet icons

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3. In the **Define Views**

[Related Topics](#)

- [About spreadsheets](#)
- [Changing spreadsheet elements](#)
- [Changing spreadsheet views](#)
- [Copying spreadsheet views](#)
- [Deleting spreadsheet views](#)

### **Changing spreadsheet views**

Spreadsheet views are located on the View menu by clicking Current View. Each spreadsheet has one or more views created by CaseMap. Any saved custom views also display on this menu. Saved views only display for the active spreadsheet.



### **Steps**

1. On the **View** menu, click **Cu**
2. Click on the view you want to use.

The spreadsheet automatically modifies the field display for the view selected.

[Related Topics](#)

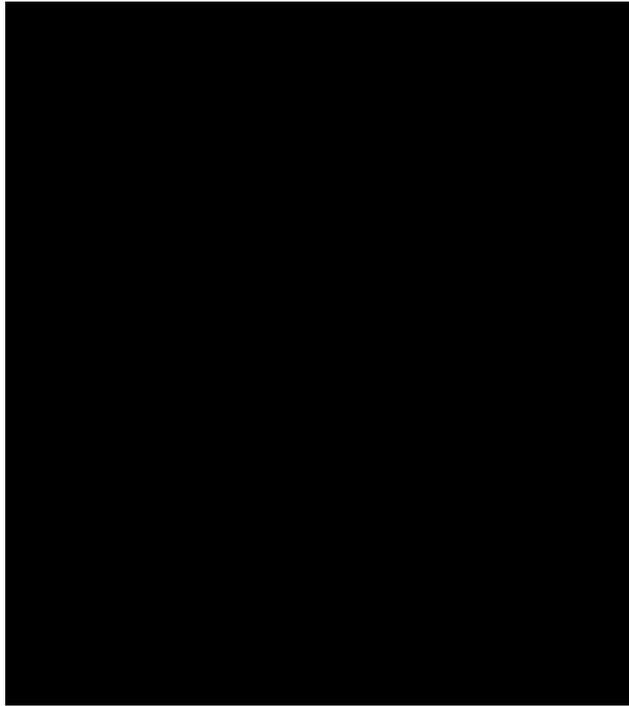
- [About spreadsheets](#)
- [Changing spreadsheet elements](#)
- [Creating spreadsheet views](#)
- [Copying spreadsheet views](#)
- [Deleting spreadsheet views](#)











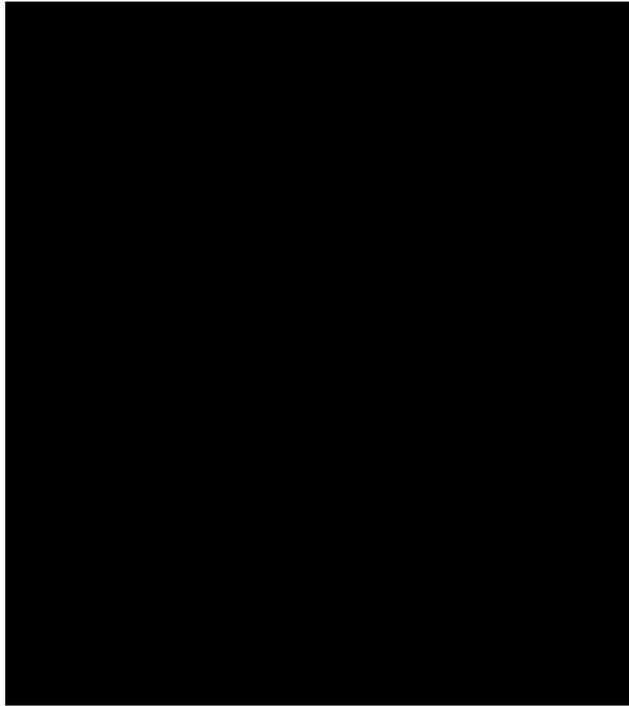








Inse i2nhi2(i2)4(n)-34gs f(i2)4(e)-7s.



4. In the message box, click **Yes** to confirm the action.

The spreadsheet no longer displays in the All Shortcuts pane.

Click Close to save your changes.







**Field Considerations**

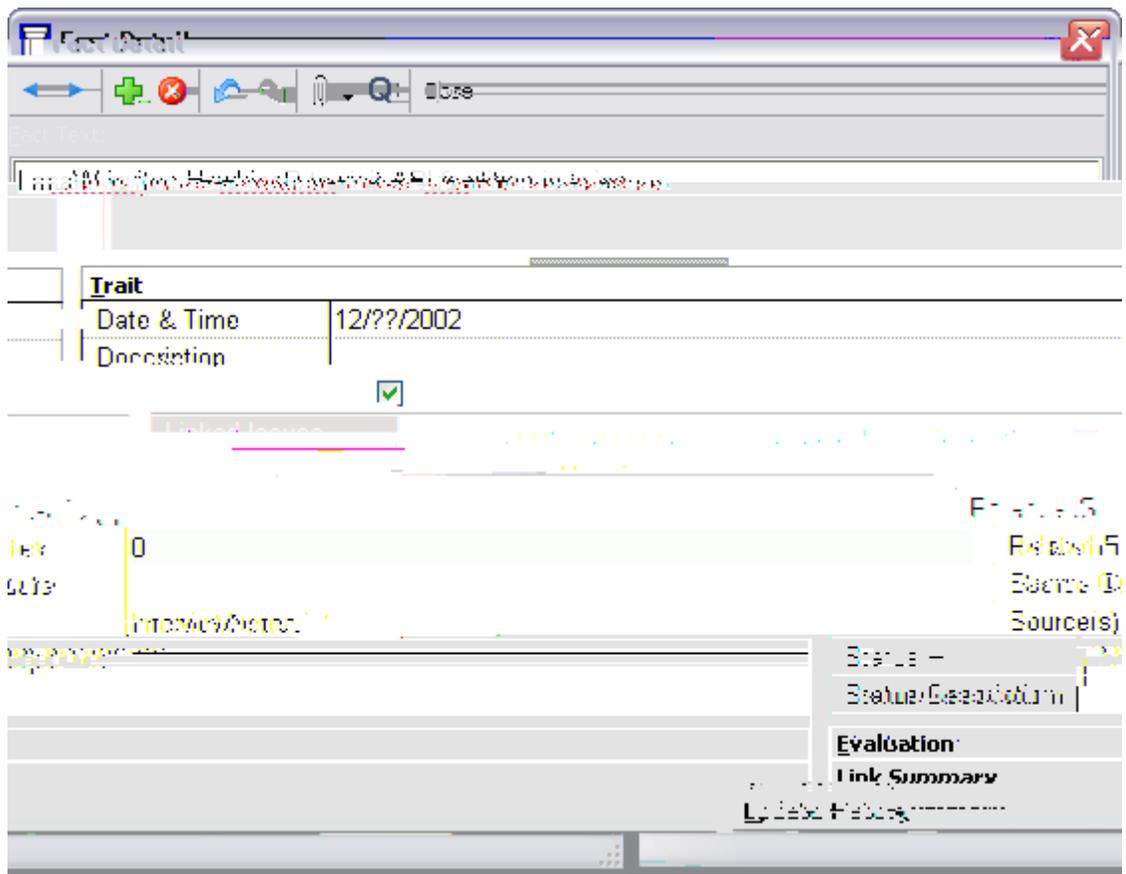
<b>Fields</b>	<b>Description</b>
---------------	--------------------

Description









☐ [List dialog boxes](#)

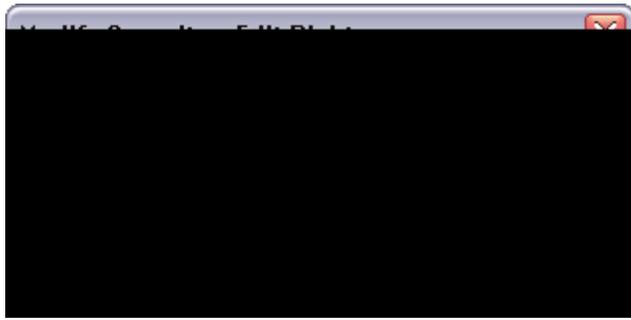
Related Topics













5. Click **Close** to save the changes.















Issues Spreadsheet Field Listing



Facts Spreadsheet Field Listing		
Field Name	What it Displays	Using It
		<06/15/97 (i.e., before 06/15/97). If two or more facts have the same date and time value, you can also add a sequence number (e.g., #1, #2).

Fact Text

The text defining the fact.

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*Objects spreadsheet field list*

**Objects Spreadsheet Field Listing — Common**

Field Name	What it Displays	Using It
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## Objects Spreadsheet Field Listing — Unique

Field Name	
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### Objects Spreadsheet Field Listing — Unique

Field Name	What it Displays
------------	------------------

Objects Spreadsheet Field Listing — Unique		
Field Name	What it Displays	Using It
	hearing (e.g., deposition, grand jury hearing, arraignment).	list of options or add a new one.
<b>Other Discovery</b>		
Response Date	The date a response was received.	Type a date directly or use the Date Stamper. This field supports the use of fuzzy dates such as 05/??/99.
Response Received	An indication of whether or not a response has been received.	To indicate a response has been received, select the check box.
Service Date	The date of service.	Type a date directly or use the Date Stamper. This field supports the use of fuzzy dates such as 05/??/99.
Type+	The type of discovery (e.g., Interrogatory, Request for Production, Request for Admission, Interview).	Select an existing value from the list of op60(r)]TJ T* [(P)-64(r)1s oi
<b>Demonstrative Evidence</b>		
Estimated Cost	An estimate of what it will cost to produce the visual.	Type a nsumber upmaoa 5 characters of text.



Related Topics

### Questions Spreadsheet Field Listing

Field Name	
------------	--



















1. On the **Insert** menu, click **Insert Symbol**.
2. In the **Insert Symbol** dialog box, select the symbol you want to use, then click the **Insert** button.
3. Click **Close** to return to your spreadsheet record.

 To save a record

To save data in a field, press Tab to move to the next field -133 -943 cm BT 0 g /TT2 12 Tf rec /TT2 1 automatically saved.

*Hc'gUj Y'U'fYVtfxZ'WccgY'cbY'cZH Y'Zc``ck ]b[ 'cdh]cbg.*



1. In the **Case Shortcuts** pane, click the icon for the spreadsheet you want to use.
2. Create a new text field in the spreadsheet for the new numbering format.  
For more information, see [Creating custom fields](#).
3. Filter records to include only those that you want to apply the new numbering format to.
4. On the **Tools** menu, click **Case Tools** and then click **Auto\* u mer\* ecor s**





## Short Name Considerations

### Fields







 To use the Link Assistant tool

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After you create your initial issue outline, you have the option to add new issues in the Issue Linking pane, which is accessible from each spreadsheet. If data is imported from other applications using the Send To feature in CaseMap, you can link content to data using the









Record data is automatically saved as you navigate to a new cell or record.















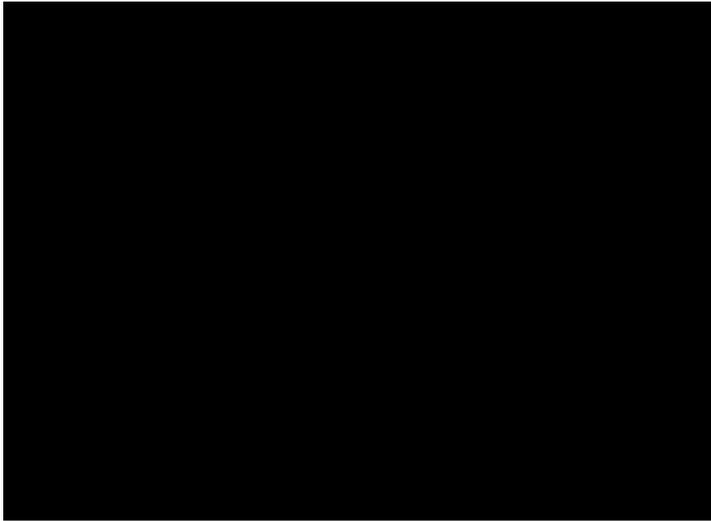


Notice that the text is now enclosed in brackets, indicating(n)-34(o)-a4(o)-link is set from record to the source file.



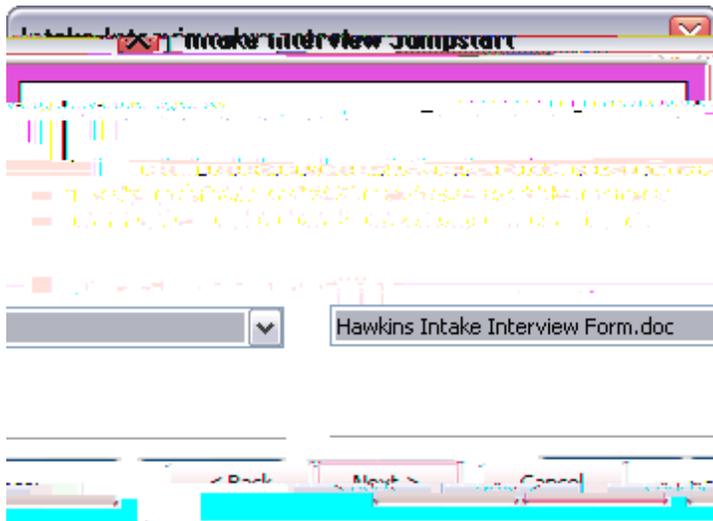






4. In the





8. In the **Choose date format and start import** box, click the date format you want to use or keep the default date format of **m/d/yy** in the **Date Format** list.



 [Send to CaseMap](#)

Using the Send to CaseMap wizard, you can send selected document content (usually fact text or research extracts) from other applications into a spreadsheet like the Facts spreadsheet. You can also send Word documents and PDF files to an objects spreadsheet, such as the Documents spreadsheet. You can send fact text or documents to CaseMap from a variety of external applications, including Microsoft® Word and Outlook, Adobe® Acrobat

file viewer, please contact your CaseMap Sales Representative for upgrade pricing. For more information, see [DocManager](#).













Adobe Reader, you can activate DocPreviewer in the Adobe products by clicking Detect and Repair on the Help menu. Select the Modify option in the maintenance setup to complete the installation process.

If the install package for maseMap is not available on your computer, the Detect and Repair option may not work. You can install DocPreviewer by reinstalling maseMap at [www.lexisnexis.com/casemap](http://www.lexisnexis.com/casemap).

 **To update DocPreviewer**

To update DocPreviewer, click on the Help menu and then click Detect and Repair. This maintenance utility will install the latest version of DocPreviewer and subsequently update Adobe Aeeat and Adobe Reaer, as neee

before making any changes to them. Even though you can restamp the documents, if needed, it is always good to have an unaltered original stored in case something happens to the stamped or marked up version.

#### Review Bates stamping features







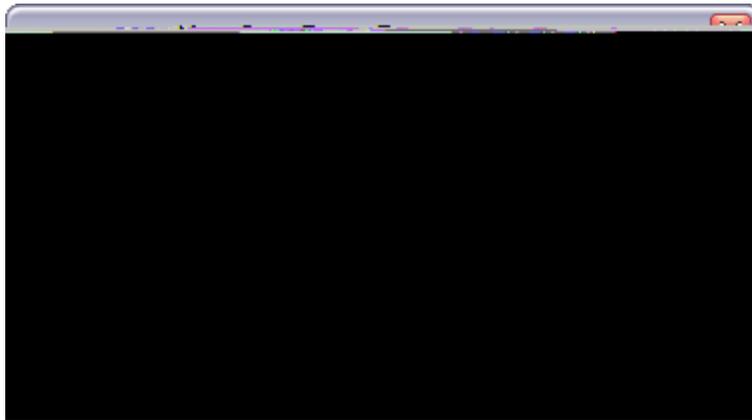
3. In the message box, click **OK** to send all linked PDFs in the current spreadsheet to the CaseMap Bates Stamp utility.
4. In the **Batch Processing - Review Linked Files** dialog box, review linked files and remove any you do not want to Bates stamp.



5. Click **OK** to continue.  
The CaseMap Bates Stamp Utility now launches.
6. On the submenu, click **Bates Stamp PDFs**.
7. In the message box, click **OK**.  
Notice that Acrobat automatically launches behind the CaseMap Bates Stamp Utility.
8. In the **CaseMap Bates Stamp Utility**, click **Next**.
9. In the **Select the PDF files you want to Bates Stamp** dialog box, click the **Add Folder** button to navigate to the folder where the PDF files are stored.  
**Optional: To Bates Stamp an individual PDF**
  - a. In the **Select the PDF files you want to Bates Stamp** dialog box, click the **Add Files** button to navigate to the folder/where the PDF file is stored.



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17. In the **Case Name** field, type in the name for the Bates numbering format, then click **Finish**.
18. In the **Review case Bates Numbering format** box, verify the Bates numbering range and prefix, as well as format settings.
19. Opti9(f)19(o)-6(g)-44(s613a.))TJ -24 -2>1 Cgick





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 Case option settings are specific to each case.

#### To manage Bates numbering formats

You can manage Bates numbering formats in Adobe® Acrobat.

1. Launch **Acrobat** and close any open documents.
2. Click on the **CaseMap DocPreviewer** button and then click **Bates Stamping > Manage Bates Numbering Formats**.
3. In the **Manage Bates Numbering Formats** dialog box, click the **New** button.
4. In the **New Case Bates Format** dialog box, select the maximum number of pages you

4. Click **OK** to save the setting change.

 [To run the Bates Analyzer](#)

Related Topics

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2. In the **Send to CaseMap - Edit Document** dialog box, set additional field status for this record or click on the **Issue Linker** bar to link to case issues.
3. When you are finished, click **OK** to save your changes.

Related Topics

[About importing data](#)

[About PDFs and DocPreviewer](#)

[Sending facts from PDFs](#)

[Reviewing PDFs](#)

[Importing documents](#)

### ***Reviewing PDFs***

The Review PDFs feature allows you to review linked PDF files in a case spreadsheet in Adobe® Acrobat or Adobe® Reader — without having to flip back and forth between the PDF file and CaseMap.





***Batch printing linked PDFs***

The Batch Print PDFs tool allows you to print a set of PDFs in a spreadsheet that were linked



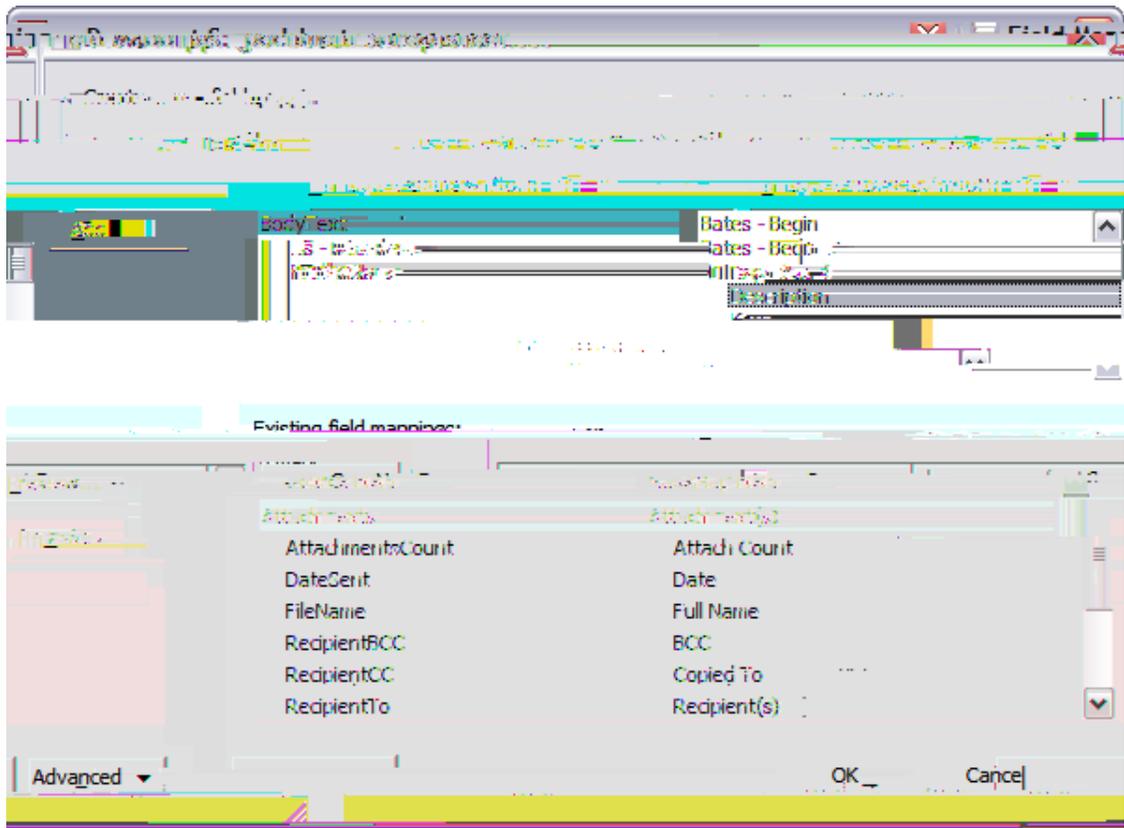
## Importing Emails

### *About importing emails*

The easiest way to import emails into a case is to use the [Send Email to CaseMap](#)

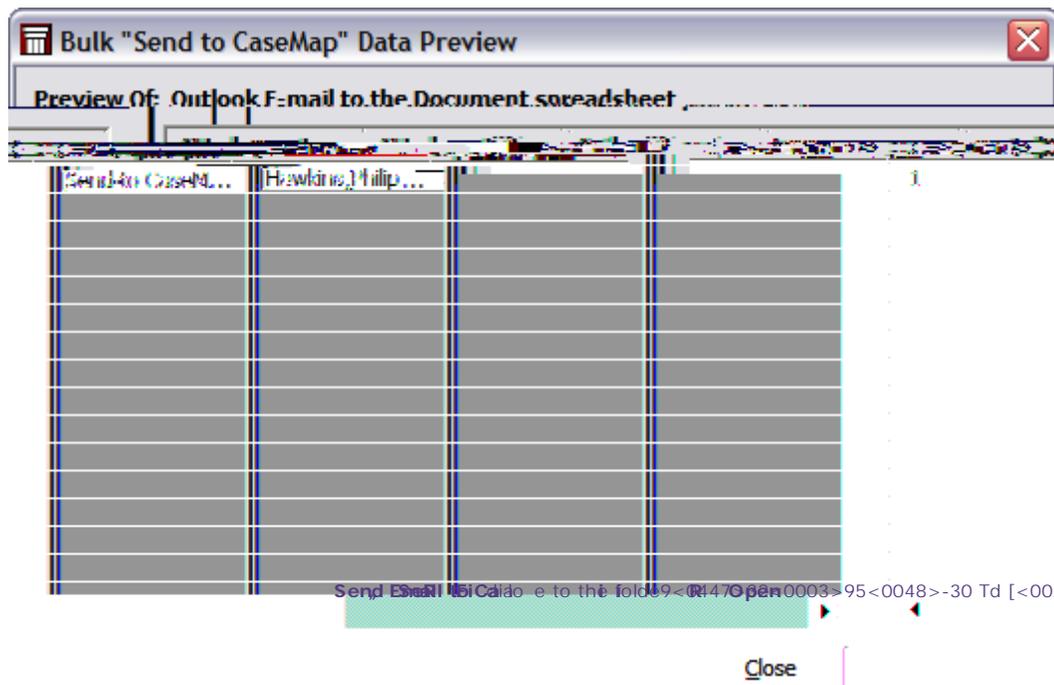






3. In the **Unmapped Source fields** box, select the Outlook email field that needs to be mapped to a CaseMap field.
4. In the **Unmapped CaseMap fields** box, select the field you want to map to unmapped field.
5. Click the **Add** button.  
The mapped fields now display in the Existing field mappings box.
6. Click the **Remove**





5. Click **Close** when you are finished.

#### To load field mappings from a file

1. In **Outlook**, click the **Send Email to CaseMap** button.
2. In the **Send Email to CaseMap** dialog box, click the **Field Mappings** button.
3. In the **Field Mappings** dialog box, click the **Advanced** button and then click **Load Mappings from File**.
4. In the **Open** dialog box, navigate to the folder and select the field mapping file you want to load into the case.

Field mapping files have a .cmbulkmap extension.

5. Click **Open**.

The field mapping structure now displays in the Field Mappings dialog box for you to use or modify as needed.











This should be the desktop folder you saved the zipped .PST files.

7. In the **Options** area, select the appropriate option for duplicate handling, then click **Next**.
8. Next select the folder to import from and choose whether to include subfolders.
9. C                    choose wre to import the folder.  
Personal Folderssell make it part of your Inbox.
10. Cick **Finish** to complete the appess.





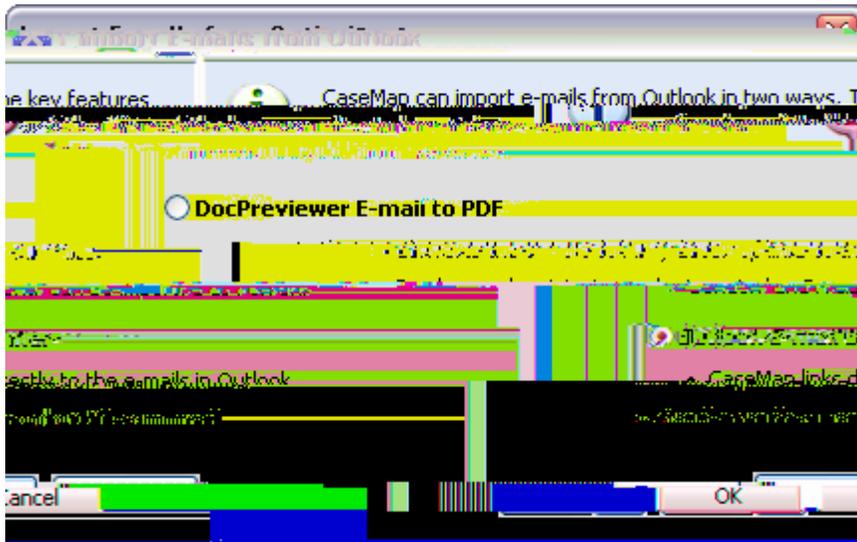




5. Click **Close** to continue.

**To import emails in Outlook**

1. Add the Outlook Email Linker to the File menu's Import submenu.
2. Open **File** from Outlook, click **Import** and then click **Outlook Email Linker** in the emails you import.





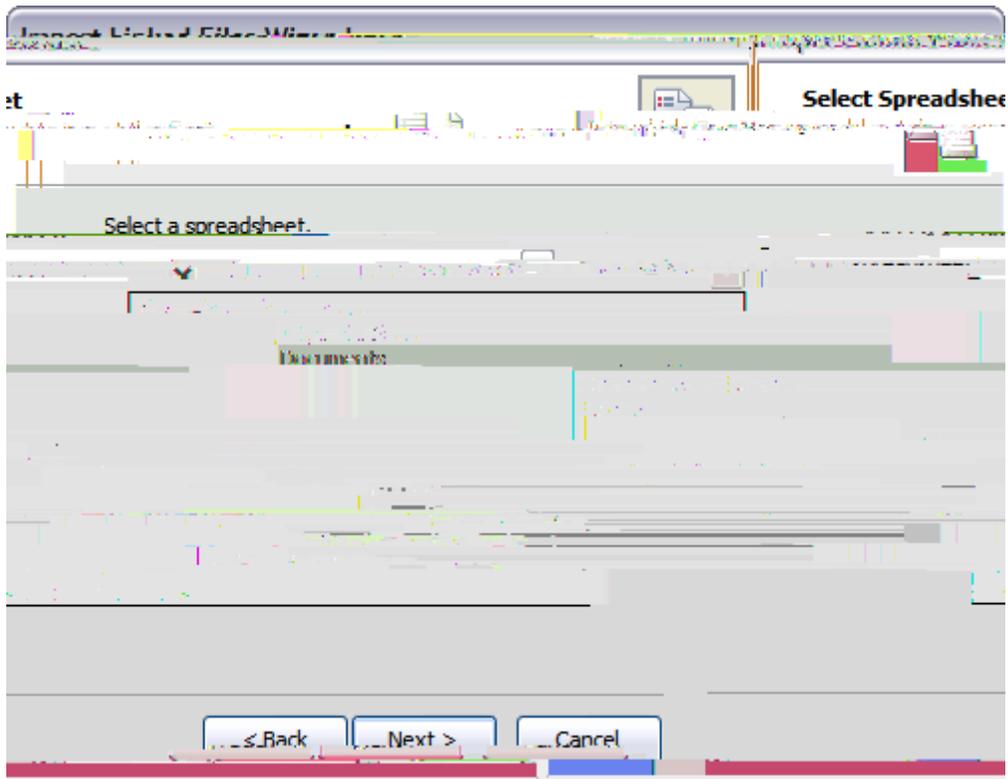


## Importing linked files

The Import Linked Files Wizard guides you through the process of importing one or more documents/files into your case. The wizard will create a new record for each file you select to import. You can select one or more files, or a folder of files to import. If a folder contains subfolders, all files in each subfolder will be selected for the import as well.

CaseMap recognizes duplicate documents imported from the same folder. However, if you have the same document stored in different folders, CaseMap will create separate records for each.



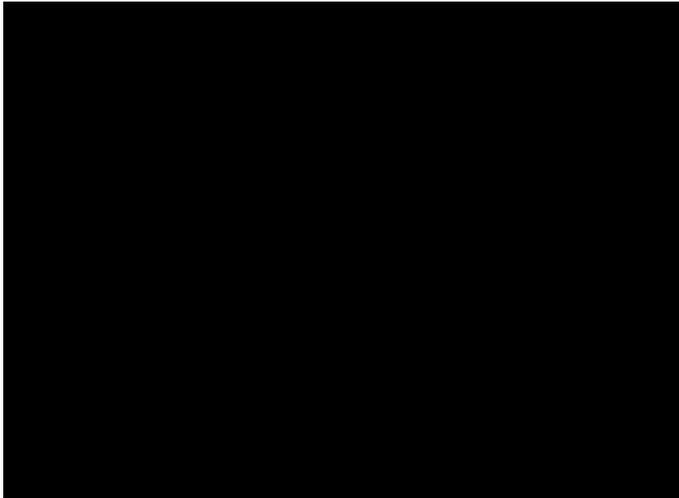


8. In the **Spreadsheet**





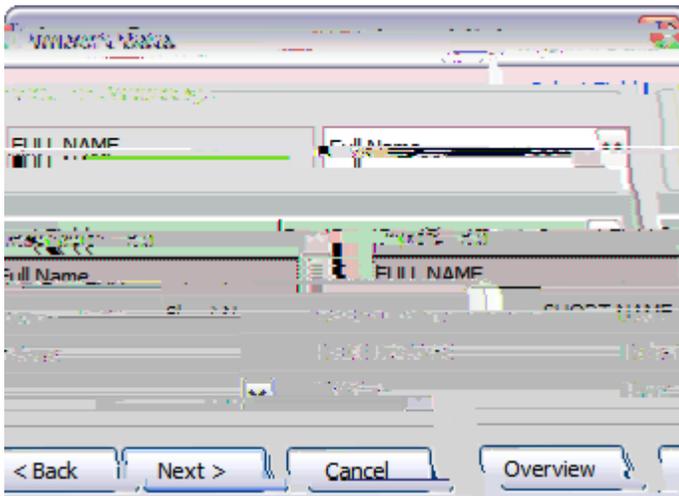




11. In the **CaseMap spreadsheet** dialog box, select the spre24(a)-dsheet in which you w24(a) import d24(a)-t24(a)-, **Next** click

If you 24(a)-re importing objects, select the object type spre24(a)-dsheet, then click Next

12. In the **Select Field Mappings** dialog box, map the import fields frm the text file to the destin24(a)-tion fields in the spre24(a)-dsheet.



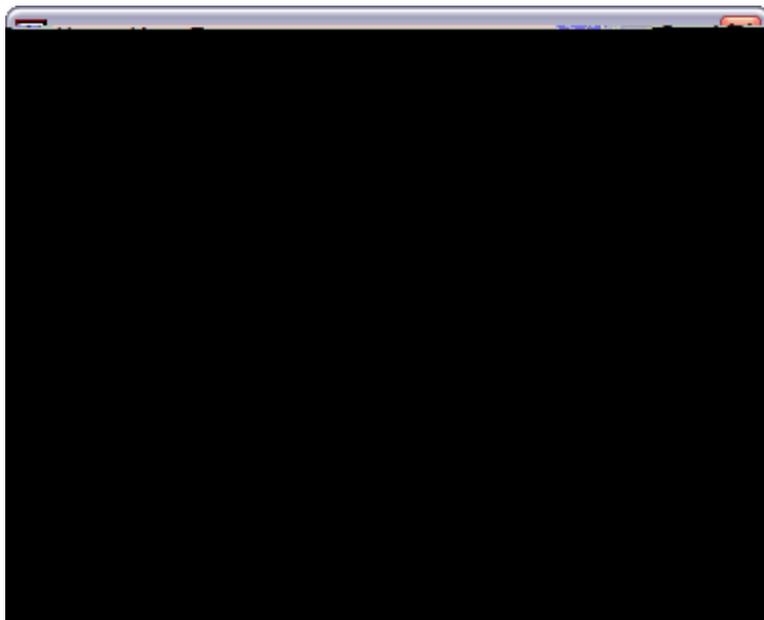
13. In the **Import Data** dialog box, select the a field you w24(a)-nt to map in **Import Field** list.
14. In the **Select Field Mappings** drhp-dhwn list, select the CaseMap field (Destin24(a)-tion f where you w24(a)-nt to import the d24(a)-t24(a)-.
15. Repe24(a) **Steps 14-15** for e24(a)-ch import field, then **Next**.
16. In the **Review** dialog box, preview the field mappings you specified, then click







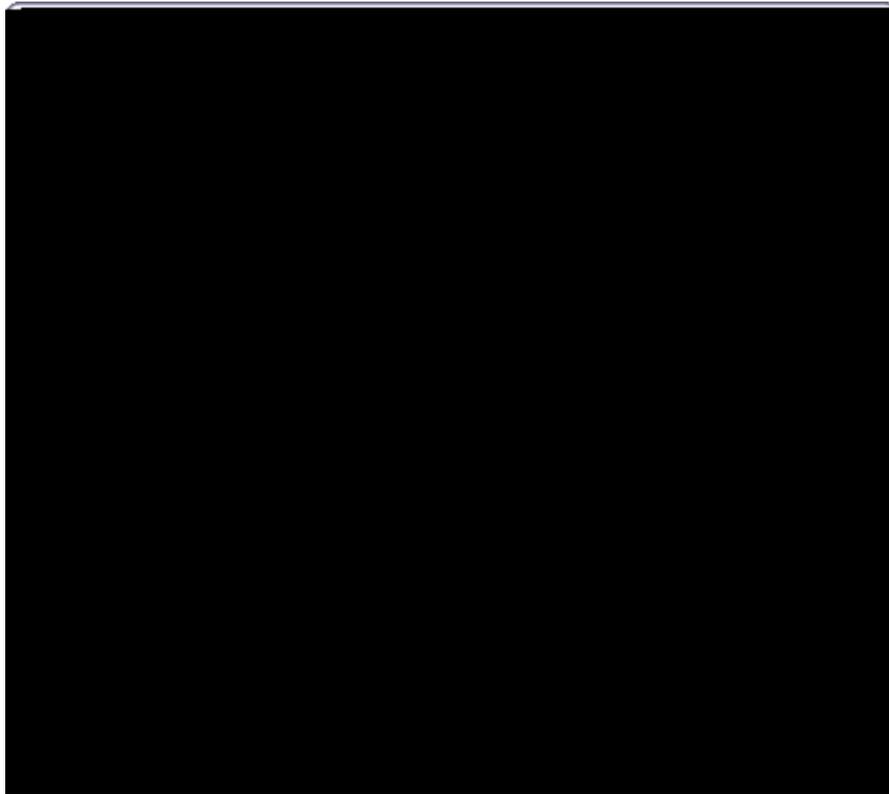




5. In the **Full Name** field, review or edit the default full name for the document.
6. In the **Short Name** field, review or edit the default short name for the document.
7. Click **OK** to continue.
8. In the **Send to CaseMap – New Fact** box, select **Fact Text** in the **Append Text Selection** to field so that the excerpt displays in the Facts spreadsheet.



 [To send Word documents to CaseMap](#)



4. Click the **Issue Linker** bar to link the record directly to a case issue.
5. Click **OK** to save your edits.

The new record information is now saved in the case spreadsheet.

 [To view the Word document in CaseMap](#)

1. Open the **Word document**

5. In the **COMAdd Ins** dialog box, select **LexisNexis CaseMap COMAdd In**.
6. Click **Add** and then click **OK**.

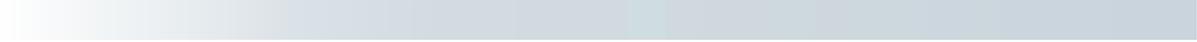
The LexisNexis CaseMap COM Add In now displays under the Active Applications Add Ins area.

7. Click **OK** to save your changes.

The CaseMap ribbon now displays in Word 2010.

Related Topics

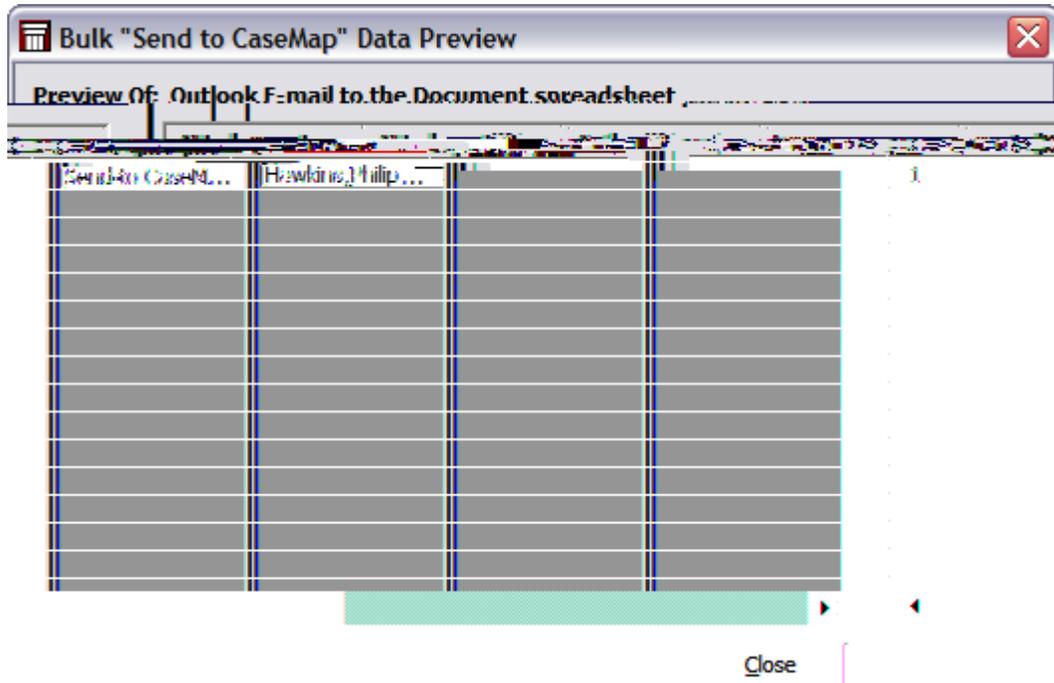
indexing process completes. When you click the paperclip icon for the new record, the email displays in CaseMap's DocManager.





3. In the **Unmapped Source fields** box, select the Outlook email field that needs to be mapped to a CaseMap field.
4. In the **Unmapped CaseMap fields** box, select the field you want to map to unmapped field.
5. Click the **Add**

1. In **Outlook**, click the **Send Email to CaseMap** button.
2. In the **Send Email to CaseMap** dialog box, click the **Field Mappings** button.
3. In the **Field Mappings** dialog box, click the **Preview** button.
4. In the **Bulk Send to CaseMap Data Preview** dialog box, review a list of selected emails you are including in the import and review the number of email attachments.



5. Click **Close**













3. When the Send to CaseMap utility launches, select **Proceeding** for the spreadsheet in



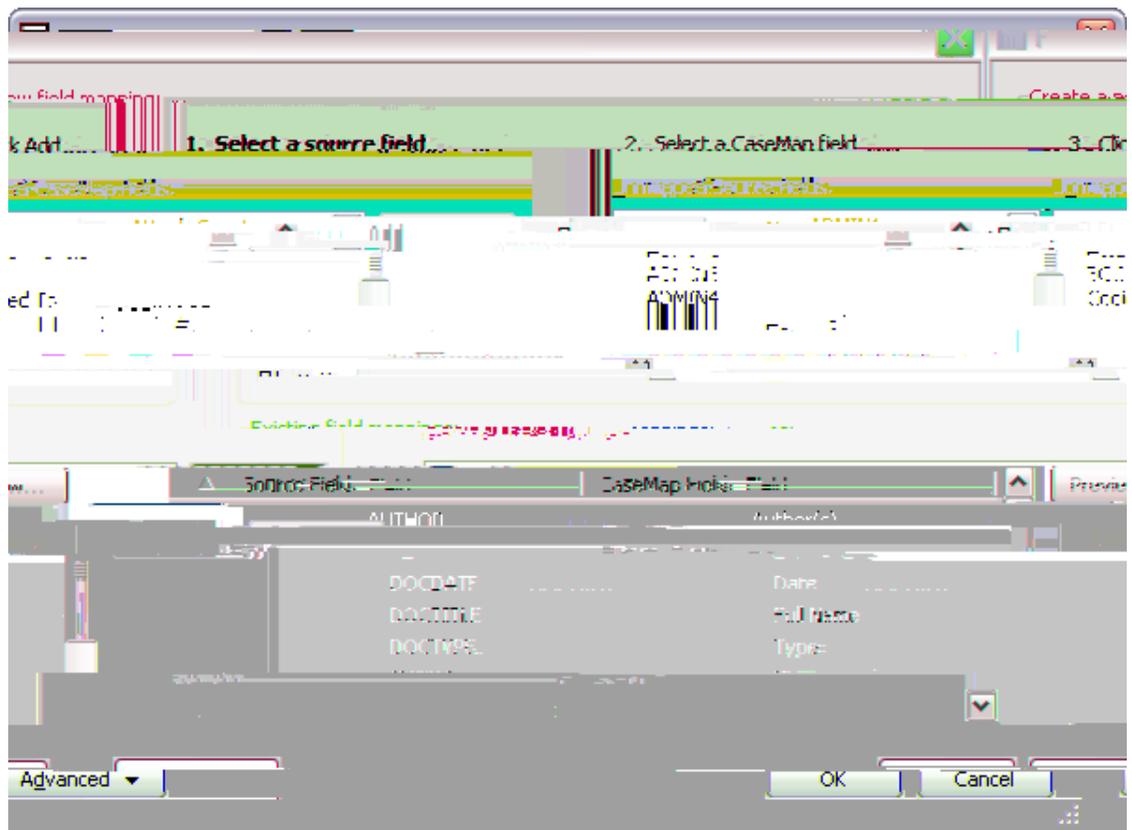


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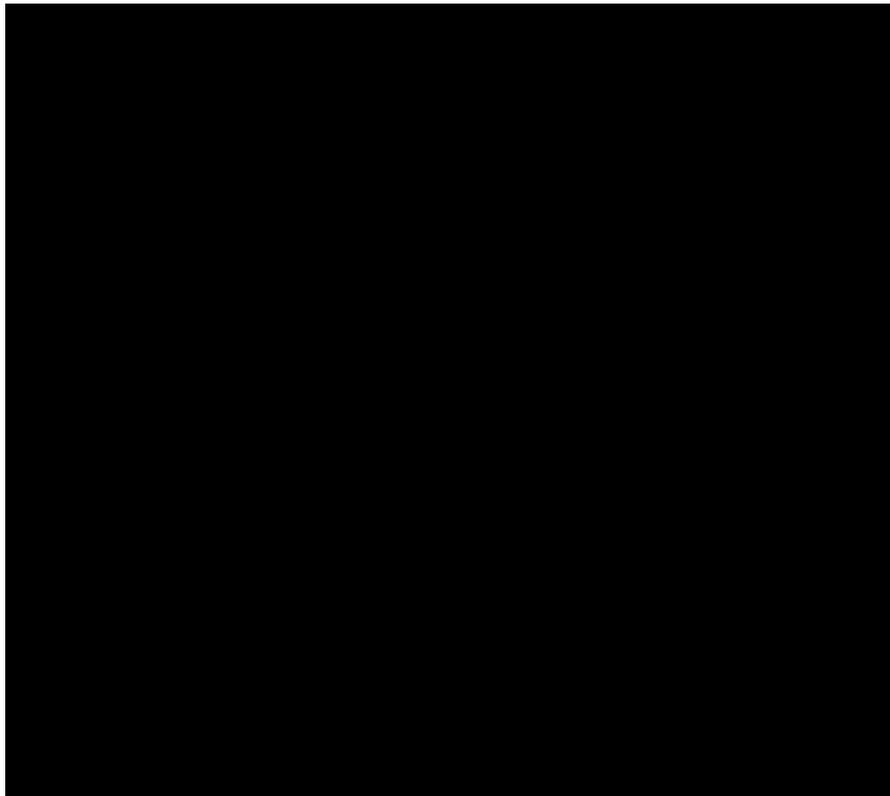


10. Next select the field you want to map to in the **Unmapped CaseMap** fields list, then click the **Add** button.

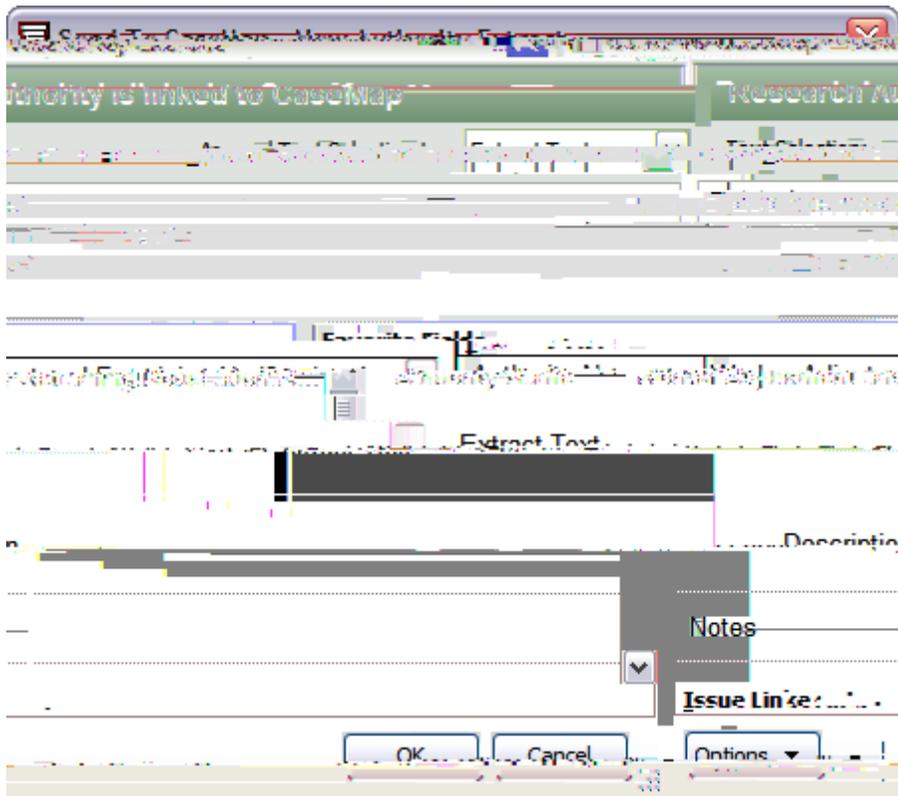
11. Continue mapping fields until you are finished, then click **OK**. 11 in the

Related Topics









3. Click reserved.



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the # Field you want to analyze. Click on the Ellipsis button in a # Field cell. List dialog boxes can be printed for reference.



For more information, see

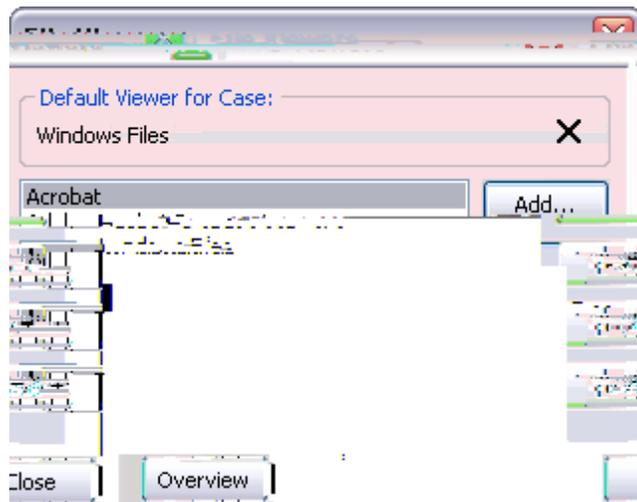
If your organization does not use one of the file viewer applications listed in the table, you still can configure the viewer to view documents from CaseMap. CaseMap supports DDE (dynamic data exchange), ActiveX Scripting, or Command Line Parameters so you can view documents. Contact your system administrator to 6(p)-44(.)314(.)31ist you with this What you need to know about file viewers and How to 6(p)-4dd/change file viewers.

External Applications			

Acrobat

File & Serve

Prima6(p)-4ct

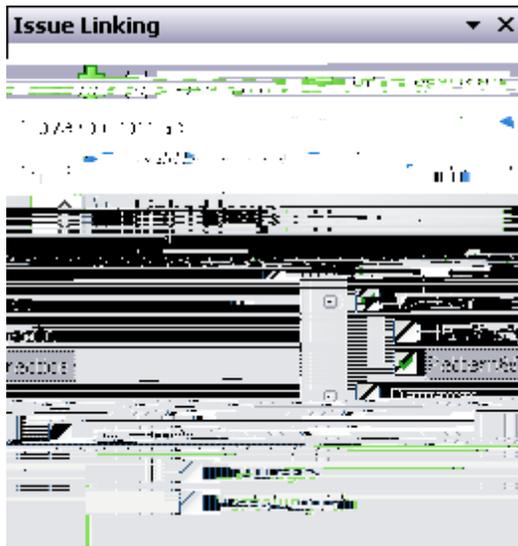






*Df]a UfmZ]Y`Xgi gYX`tc`HfUW]`]bZcfa Uh]cb`]bWl XY*: Bates - Begin and Bates - rnd, Date, Type, Author, Recipient, Description, Attachments, Review Status, Reviewed By, Linked File, and other similar field types.

*Df]a UfmZ]Y`Xgi gYX`tc`UbU`mY#WlHY[cf]nY`]bWl XY*



select it.

6. Click to **Open** and then **OK**











## Showing all facts linked to a set of objects



**To link questions to objects**

When you enter questions records, you should always type using short names so that you automatically link the records with an object (person, organization, etc.)



For more information, see [Entering questions](#)

**To link questions to issues**



2. On the **CaseMap** toolbar, click on the down-arrow at the far right of the toolbar.
  
3. Click the **Add/Remove Buttons** menu.
  
4. Click **Add Question** so that a check mark displays next





5. Click thr **Browse** button to navekte

[Research spreadsheets field list](#)

Changing research settings

## **About online research**

CaseMap has convenient access to LexisNexis' integrated legal research tools built into case spreadsheets and toolbars so you can access information you need for case discovery and





Online

11(R)-11(e)-441serch Support Contact Numbes

*F YgYUfW 'a Ybi g'UfY'UMWgg]V'Y'jb 'Hk c'd'UMWg'Zcf'H Y'gUa Y'fYW&fX.*

- Full Name field by clicking the drop-down menu 

-



Shepard's Signals











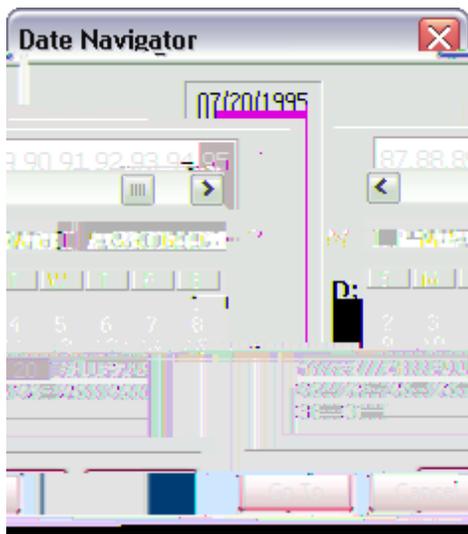
record.

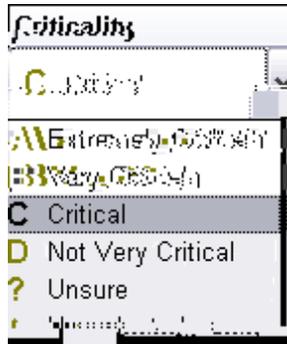
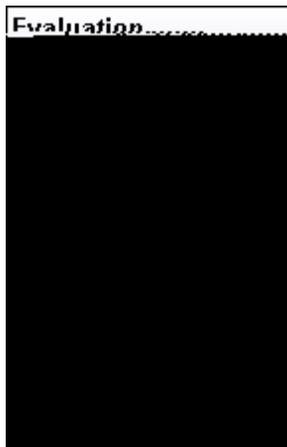












For more information, see [Creating custom evaluation fields](#).

☐ **Search, tag, and sort evaluation fields**

You can still run search filters, apply tags, and sort based on values in the Evaluation fields. For example, you can filter the Facts spreadsheet to only those facts that are rated high or those rated low. Filters based on Evaluation fields can also be combined with those based on other aspects of the case to refine the data you display.

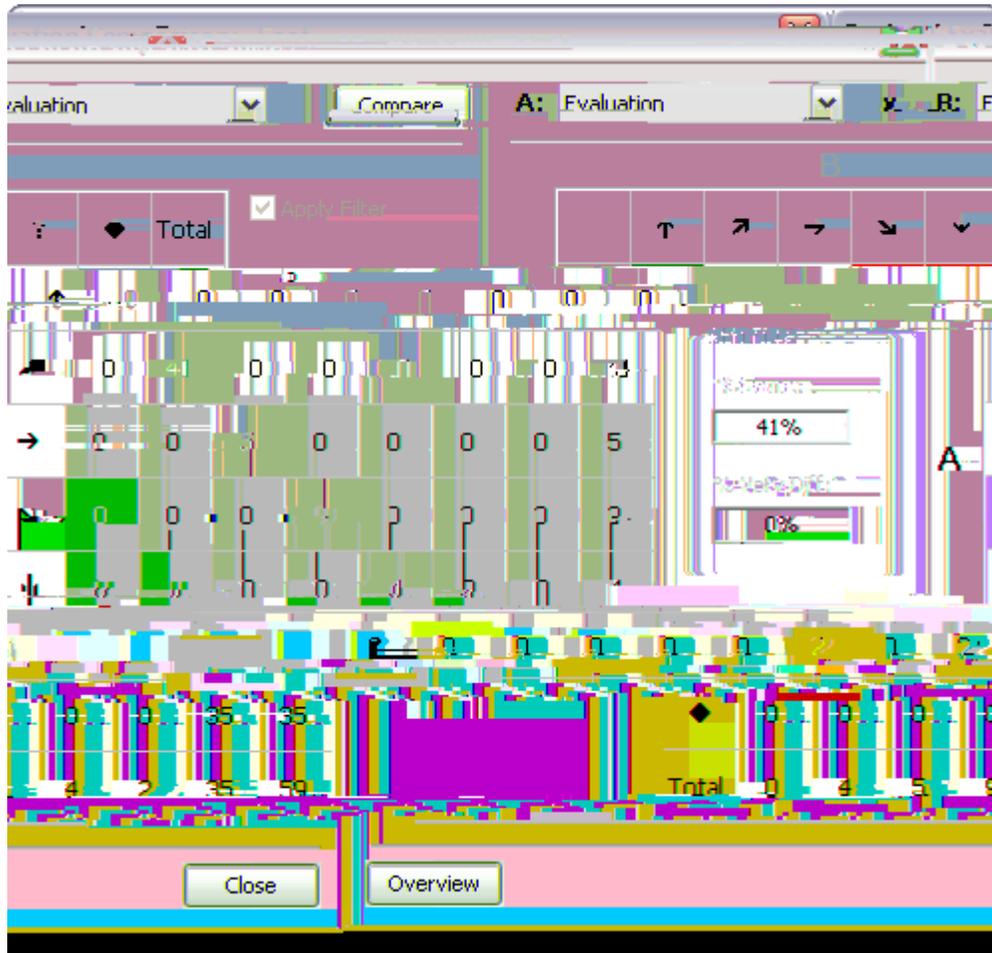
☐ **To sort an evaluation field**

question, and authority in a case. Use the Evaluation Comparison box to explore the similarities and differences among evaluations. The evaluation comparison process works identically for facts, objects, issues, and questions.

The results of evaluation comparisons display in a matrix, comparing the values of one evaluation and the columns display with the values of another. Green matrix cells are where evaluations being compared are identical. Red matrix cells are where the evaluations being compared differ. Once you know where the similarities and differences exist, you can review the specifics behind the analysis.

#### To compare evaluations

1. In the **Case Shortcuts** pane, click on the icon for the spreadsheet you want to use.
2. On the **Records** menu, click **Evaluation Comparison**.
3. In the **Evaluation Comparison** box, click on an evaluation field in the **A** drop-down listing.



4. In the **B** drop-down listing, click on another evaluation field.
5. Click the **Compare** button to view the matrix results.

6. Place your mouse pointer over a cell of interest so you can read a summary of results in





Notice that when you change a field's sort order, an arrow displays in the column header pointing up or down to show 19(t)-23(h)-34(e)-71( )19(c)urrent order.

 To sort facts by status type

1. In the **Case Shortcuts** pane, 19(c)lick on **Facts** spreadsheet icon.

Notice that by default your facts are sorted in ascending order.

2. Right-19(c)lick on **Status** field header and select **Sort Descending**.

Notice that all your fact records now sort according to Undisputed71(,)31( )Prospective, D by: Us. and Disputed by: Opposition, or other status types used by 19(c)ase staff.

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→ View menu > Advanced Filter

The Advanced Filter pane allows you to create multilevel filters and tag records produced in the result.

[Performing advanced filters](#)

### Use operators to narrow filter results

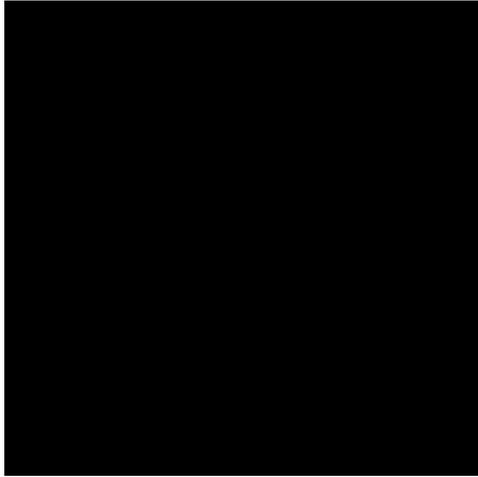
When performing multilevel instant filters or using the Advanced Filter pane, you will be working with operators to help define criteria for locating specific information.

*5Xj UbWX: ]hvf]b[ i gYg'lk c'hdYg'cZcdYfUhcfg.*

→ **Boolean** — Instant and Advanced Filter pane

→ **Relative** — Advanced Filter pane

### Using Boolean operators













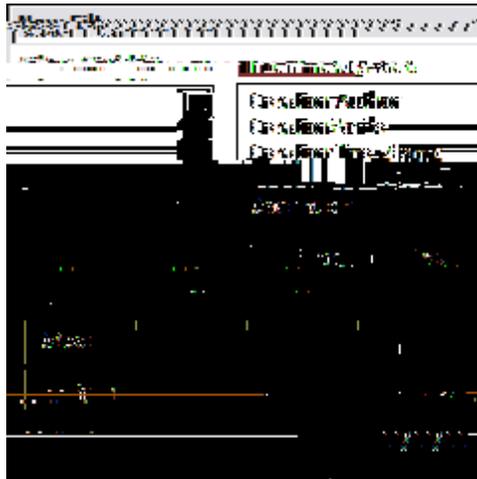




Related Topics

Advanced Filter Buttons		
Button	Name	Use
	Tag	Use the Tag button to mark records that meet certain filter criteria. This button is available in the Advanced Filter pane.
	Edit	Use the Edit button to modify the active filter.
	Cancel	Use this button to cancel current filters and refresh spreadsheet data. This button is available in the Advanced Filter pane and the Spreadsheet Title Bar.
	Cancel Tag	Use this button to remove tags from records in a spreadsheet. This button is available in the Advanced Search pane.
	Save Filter	Use this button to save filter criteria to your My Saved Filters menu listing. This button is available in the Advanced Filter pane and the Spreadsheet Title Bar.

 [To filter case records for What's New](#)



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9. In the third field, type the ending date of the fact records that you want to include in the







criteria.

---



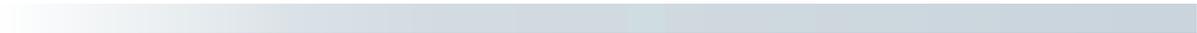
 [To disable the Search Link Assistant](#)

















Search Operators Table





7UgYA Ud'gYUfWYgHfa g]b U'ei Yfm]b H Y Zc`ck ]b[ 'cdYfUrcf dfYWXyW.

↓  
↓ LIKE





 Searching for numbers

In order to be searchable, CaseMap indexes numbers with the following restrictions:

- Search numerically from zero (lower limit) to 2,147,483,648 (higher limit).
- Iffl4(f)6am esua fvllu-34(e)-71( )19(f)24(t)-62( )19(w)56(i)-60(r)10(d)-71( )19(f)-23(h)-34









## ***Using DocManager***

### **About Docanager**



DocManager Overview			
Feature	Description	DocManager Subscription Required	CaseMap Version Required
	number, number of digits, font options, and stamp location. See		

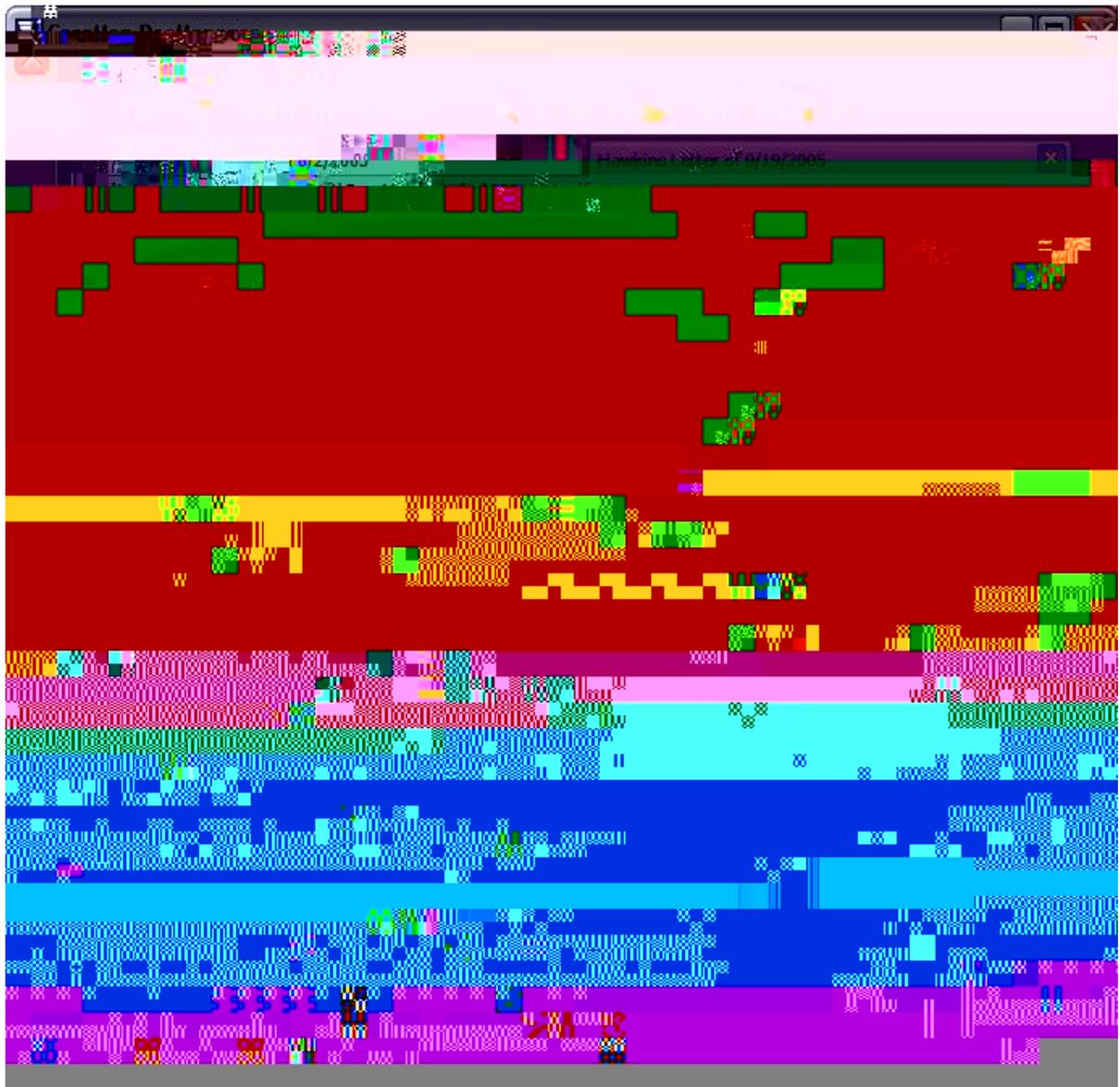








*UE-34500ing annotations*  
Creating new facts/extracts from annotations









You can also click on the View menu and then click Dock Viewer.

DocManager now displays in a docked window in CaseMap, directly under the spreadsheet window.

3. To undock DocManager, click the **Undock Viewer** button.



The document displays in DocManager in the Fit Width setting by default.

2. Click the **Fit the entire page in view** icon  to view the full document.

You can also right-click and click Fit All or press CTRL + E.

Or click the View menu and then click Zoom > Fit Page.

3. Click the **Fit the page width in view** icon  to return the document to its original view setting.

You can also right-click and click Fit Width or press CTRL + W.

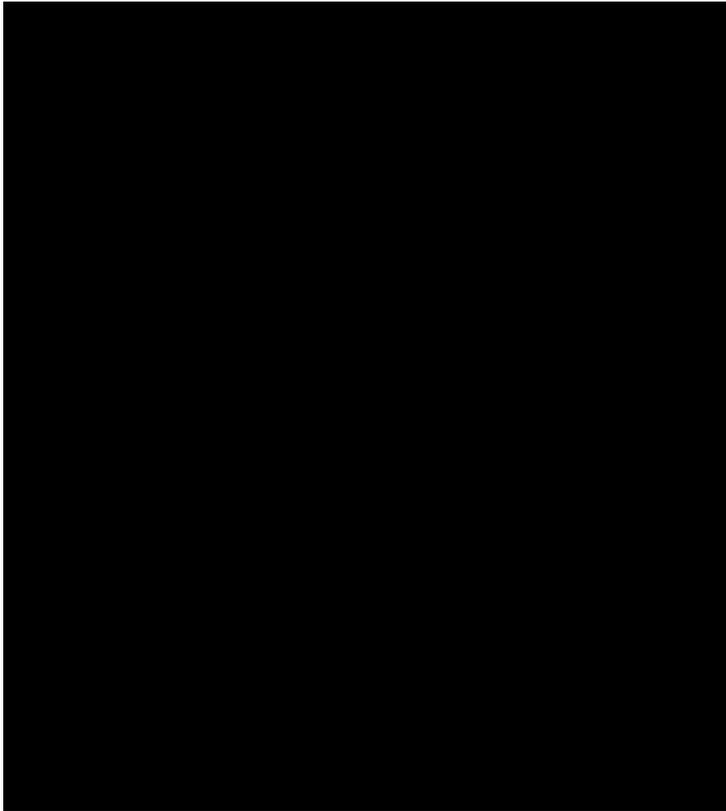
Or click the View menu and then click Zoom > Fit Width.

4. For custom view magnification click and click Fit Width oThmmm<t2m







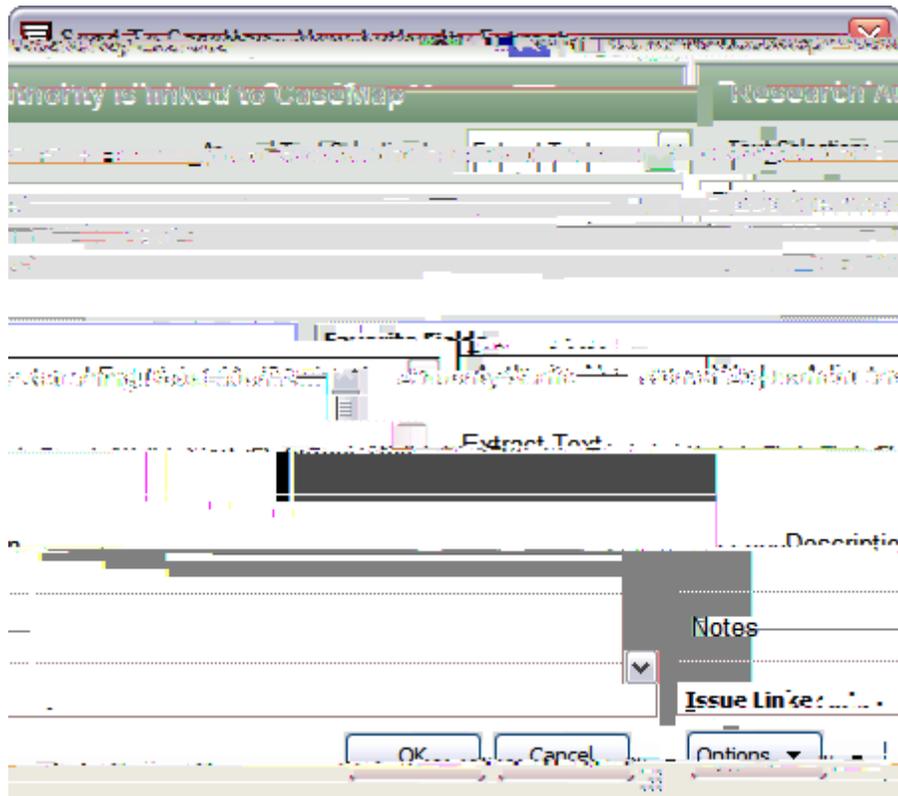


The text you selected displays in the Document Text box.

3. In the **Note** tab, type in information you want.
4. Click the **Create New Fact** button to open the **Send to CaseMap - New Fact** dialog box.







- ⚠ Do not delete the brackets from text excerpts imported using the Send to CaseMap utility. Brackets prevent CaseMap's recognition of short names and designate actual document text for the import.

6. In the **Text Selection**





3. In the **Edit Annotation** dialog box, click on the **Update History**

### Deleting Annotation Considerations

If you delete an annotation, the annotation is removed from the CaseMap. The annotation is also removed from the CaseMap's metadata. The annotation is also removed from the CaseMap's metadata.



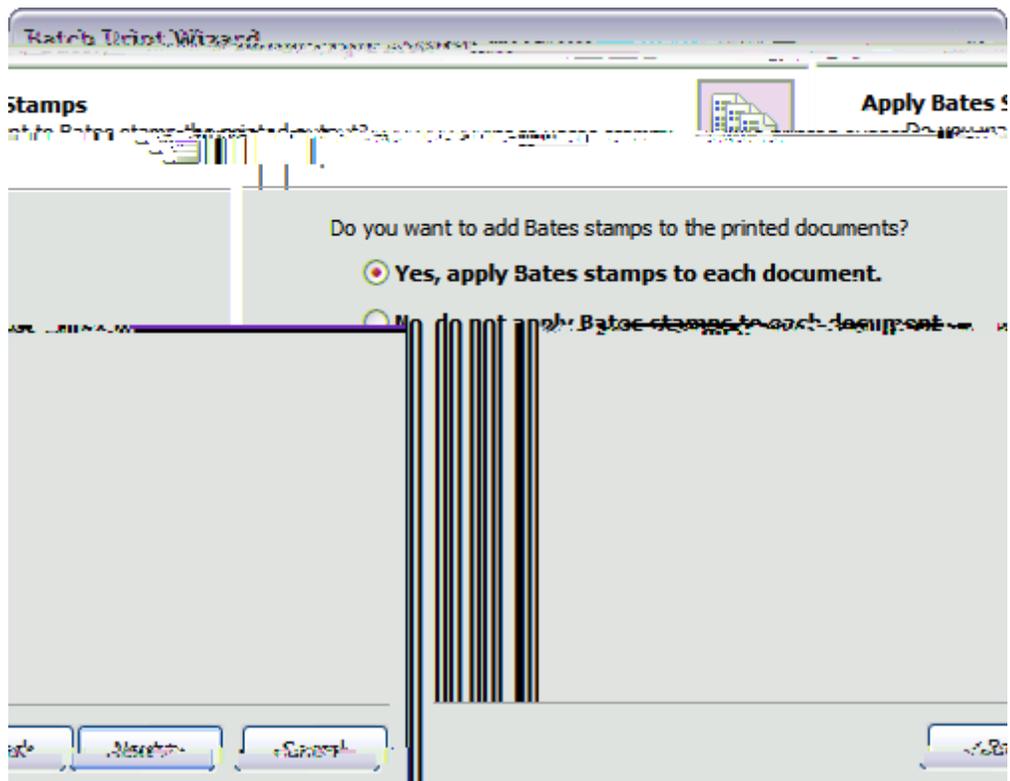








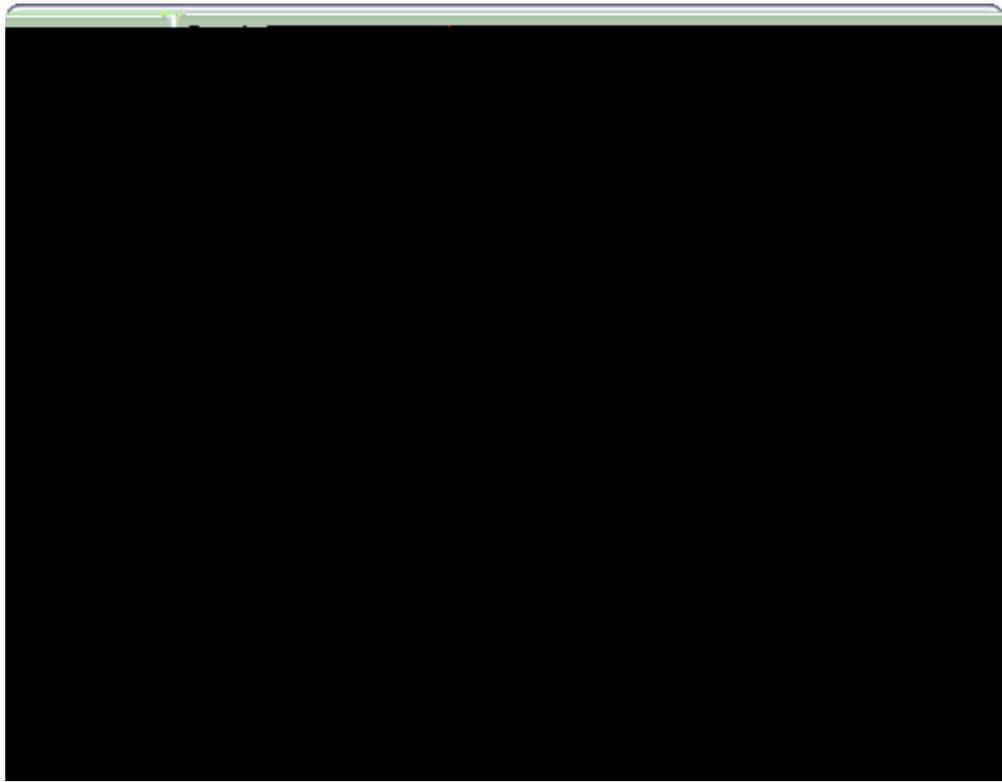














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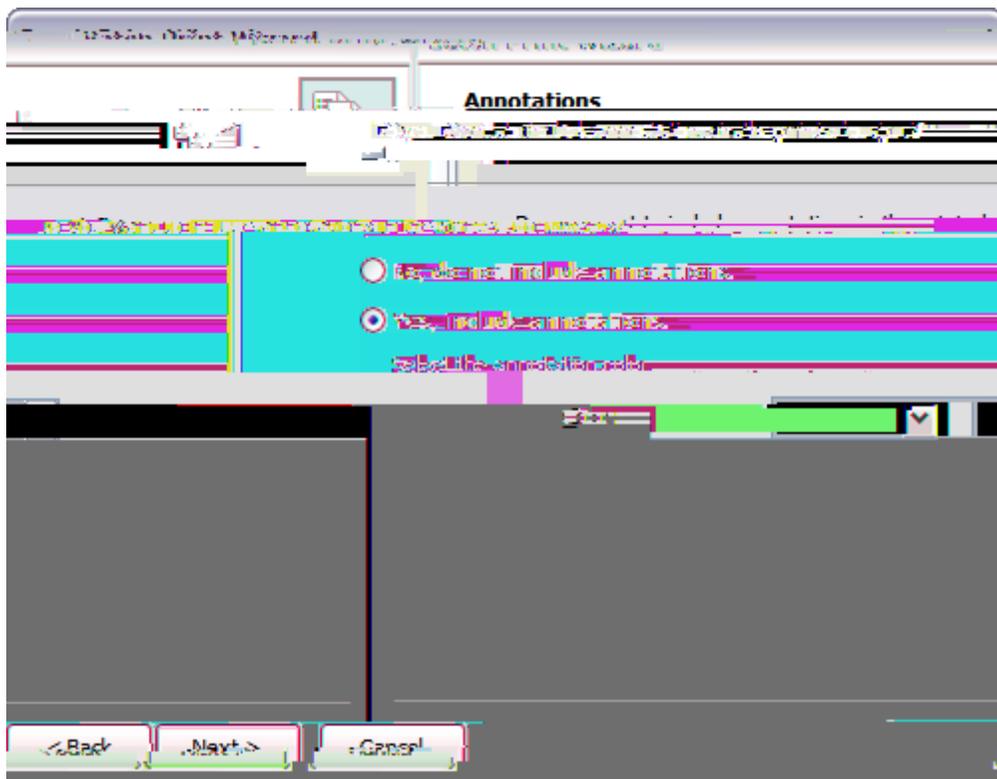




27. Click the link **Click here to open the output folder** to review the printed output.
28. Click **Finish**







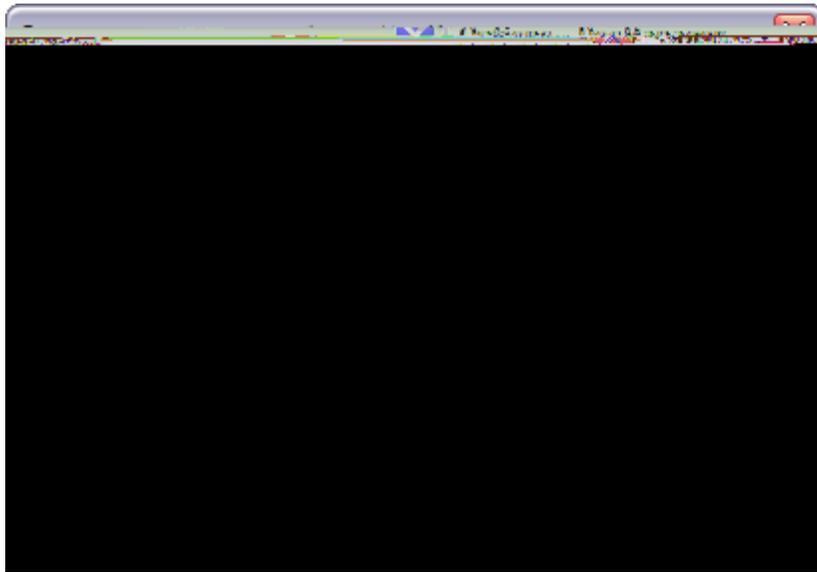


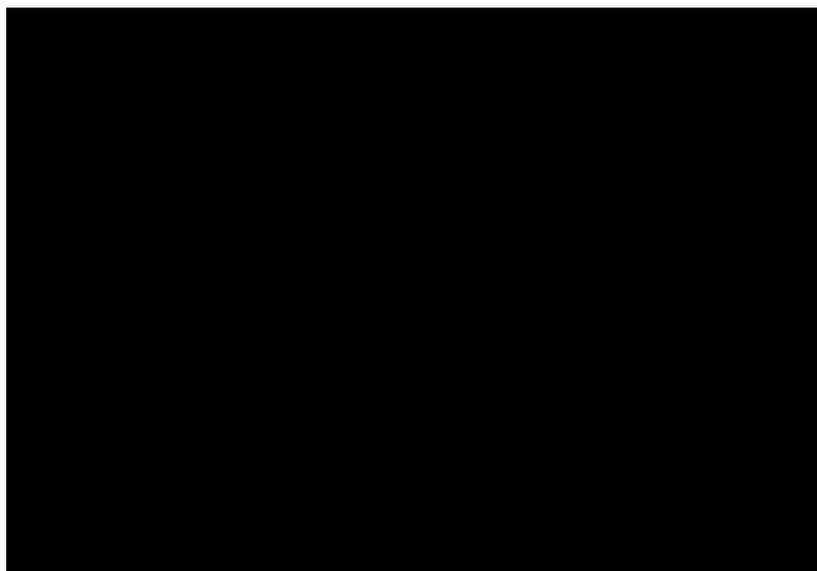
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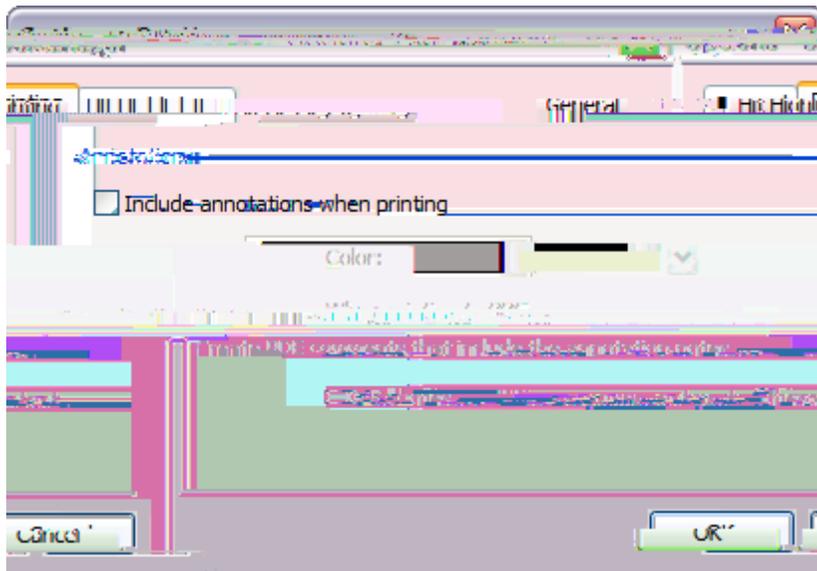
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3. In the



## Send emails to CaseMap

You can send emails from Microsoft® Outlook 2007 and 2010 to a CaseMap v10+ case. In Outlook, the Send Email to CaseMap features display on a CaseMap menu, as a toolbar button, and as a CaseMap ribbon in Outlook 2007, and on a CaseMap ribbon in Outlook 2010. The Outlook plug-in is optional during

















## ***Editing Data***

**About editing data**

- **Autocorrect and Dual Initial Cap**





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## ***Creating and Printing Reports***

**About creating reports**



## About printing reports

In CaseMap, the spreadsheets you view on the screen are reports-in-waiting. Within moments, any spreadsheet you are viewing can be printed to paper, PDF, or another application that integrates with CaseMap. CaseMap offers a variety of report output options for you to choose

Reporting Output Options	
Output	Description





## Changing report print options

















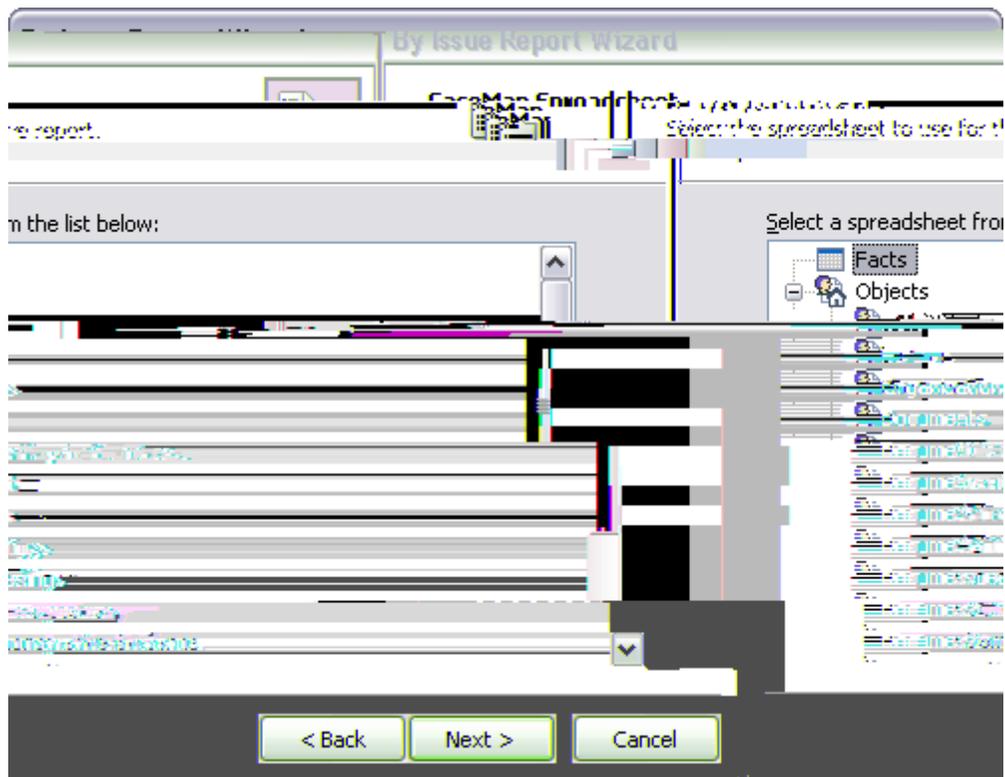
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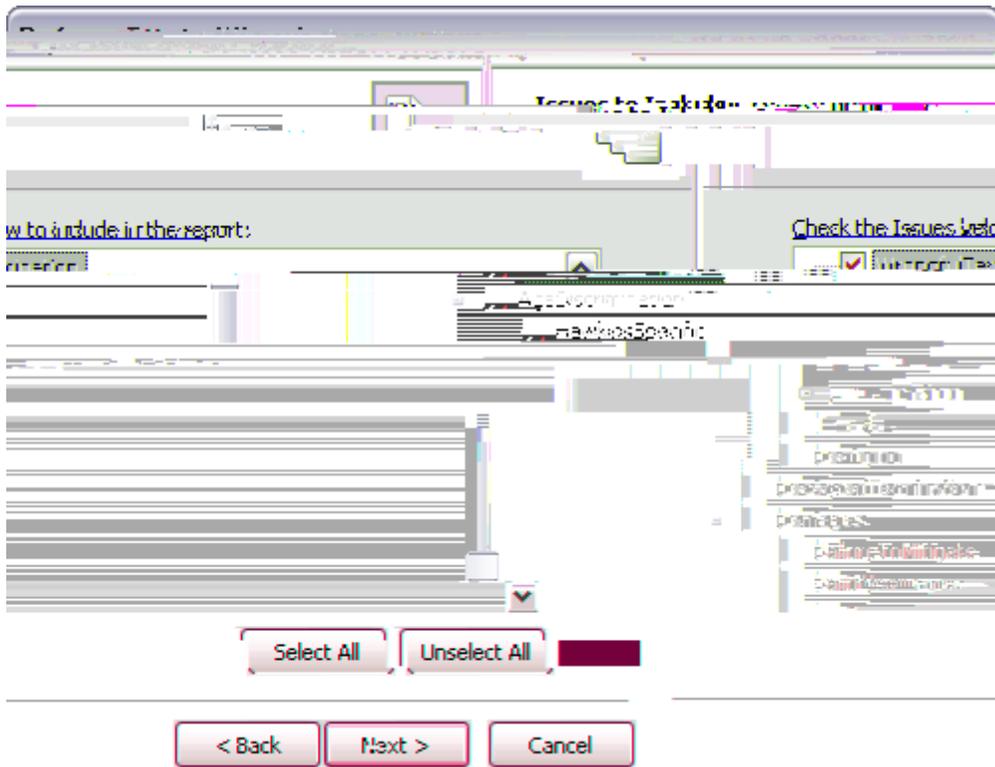
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4. In the **Customize Report** dialog box, click **Yes, I want to customize the report**, then click **Next**.
5. In the **Issues to Include**



6. Select or clear check boxes for issues, then click **Next**.
7. In the **Issue Fields** dialog box, select whether or not you want to include additional fields.

Click the Customize button to add fields to the Visible Field listing, then click OK.

Click the Show Field or Hide Field buttons to add or remove fields in the Visible Fields listing.

---

The screenshot displays the CaseMap software interface. At the top, there is a title bar with the text "CaseMap Summary Judgment Report". Below the title bar, there is a menu bar with options like "File", "Edit", "View", "Tools", "Help". The main content area is divided into two sections: "Source" and "Fact". The "Source" section contains a list of items, and the "Fact" section contains a list of items. The interface is dark-themed with white text.

[☰ To print a Summary Judgment Report](#)

1. On the **Reports**



The default setting is Undisputed. If you are filing a statement of fact other than a



2. When the wizard launches, click **Next**.
3. In the **Privilege Types**

9. In t g-34(e)-71( )TJ /C2\_0 12 Tf 66 0 Td [<0036>-40<0052>20<0055>-3<0057>39<0003>  
D" rce" dideg.

( )TJ /C2\_0 12 Tf 66 0 Td [<0027>1di<0040>4foc"040<0055>1>45<0003>9<0025>12<005

-231(g-34(e)-71( )19(o)-60(p)-44(t)-231i)21(o)-60(n)-34( )19(t)-231o)-60( )19(a)-66(d)-44(d)

8 Td [(1)-31(3)-31(.)-303(C)-52(l)21(i)21(c)21(k)9( )TJ /C2\_0 12 Tf 56 0 Td [<0029>-17<004

n t g-34(e)-71( )19(w)-99(i)21(z)-58(a)-66(r)10(d)-44( )19(p)-44(r)10(i)21(n)-34(t)-231 in t g-





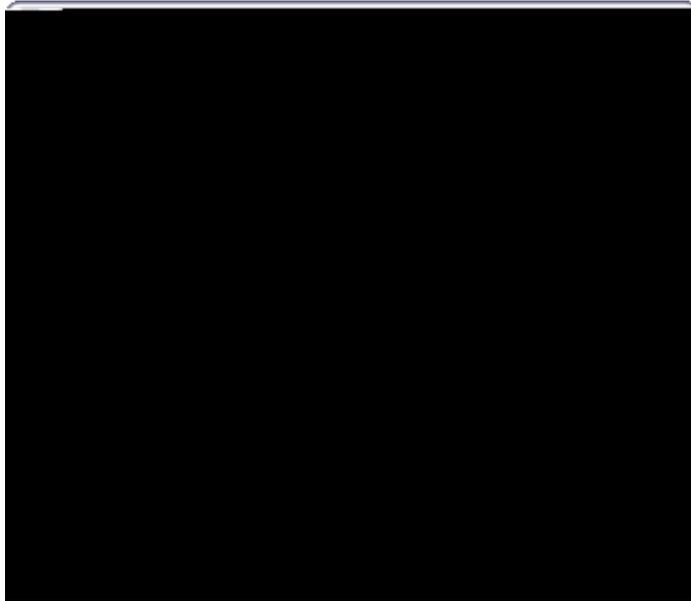




modified the spreadsheet field display order, the Search ReportBook will print the fields in your current view. However, the next time you print the Search ReportBook it will return to using a spreadsheet's default fields. You may need to modify your current spreadsheet views before printing the report again.

For more information about printing a Search ReportBook, see [Embedding linked documents in reports](#).





2. In the **Settings** area:
  - Select the



6. Click the **Preview** button to review your changes.
7. Click **OK** to sa





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a full-text search is run.

The report displays in DocManager with an Attachments pane listing the linked files. For each



 [To hide document records from](#)















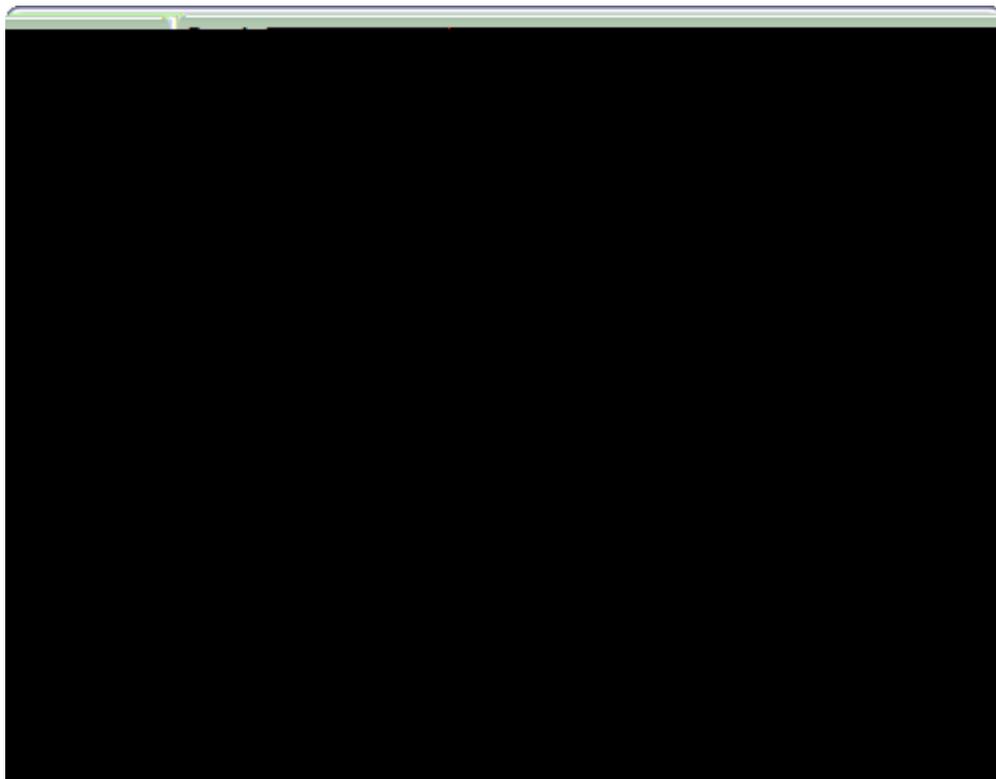
## Batch Printing Considerations

### General

the PDF or TIFF file. This option does not allow annotation notes to be viewed in the printed output.

Printing annotation notes in the PDF or TIFF output allows users to view the notes when the mouse pointer is placed over the annotation.

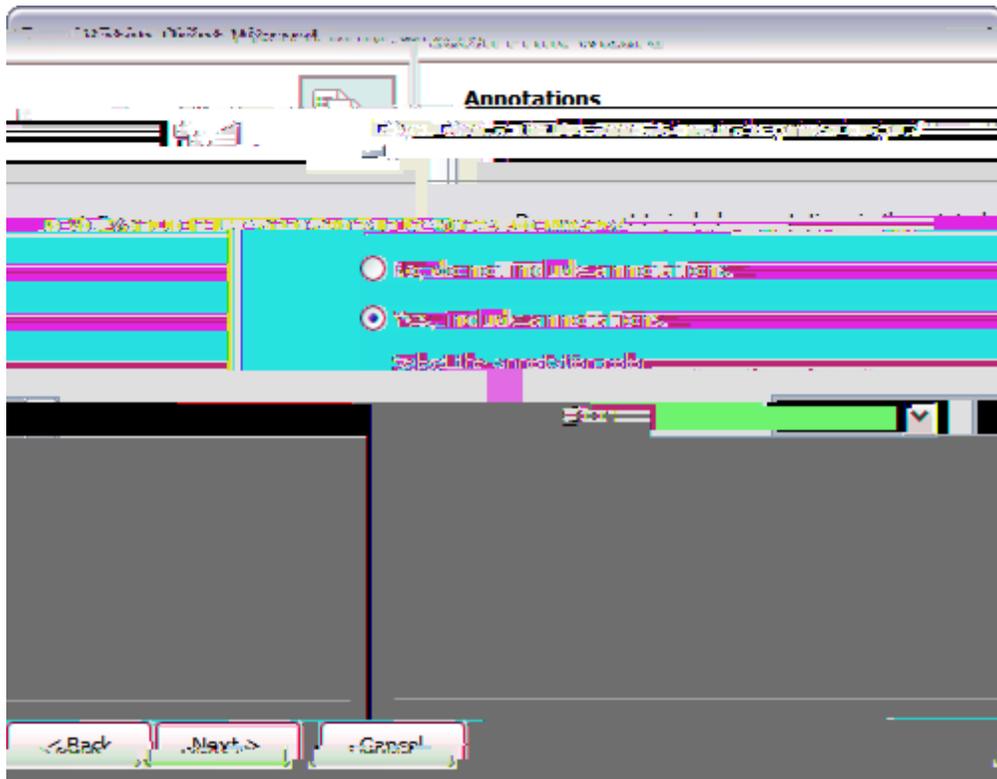
Select a custom print color for annotations. This color can be different than the color used



If you want to remove a document from batch, select the document in the Documents to print box, then click the Remove button.

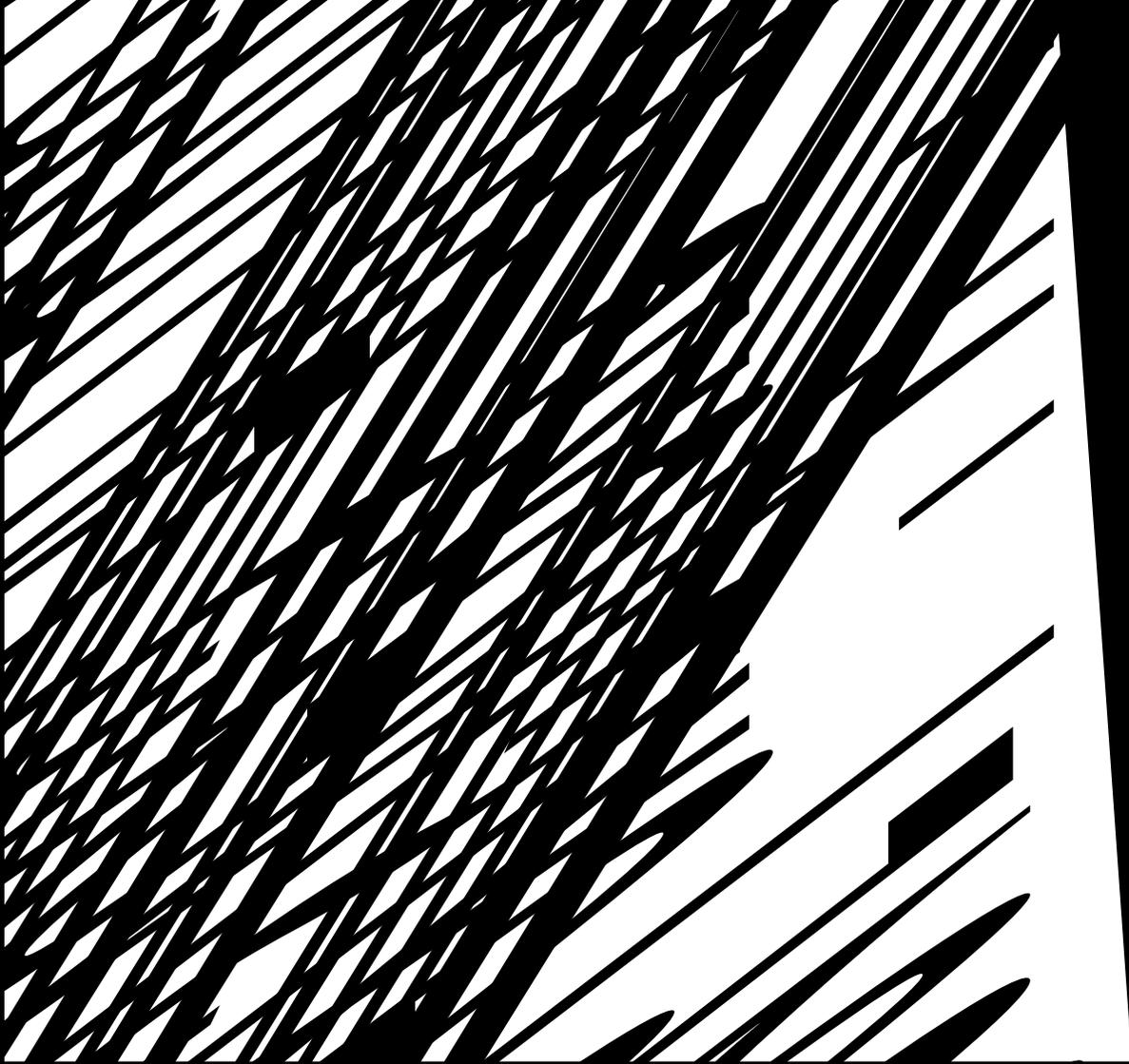
5. Click **Next** to continue.
6. In the **Document Content Colors**





If Yes, click on the color for which you want annotations to print in the Color list.

9. In the **Apply Bates Stamp** dialog box, select whether you want to apply Bates stamps to the printed documents, then click **Next**.









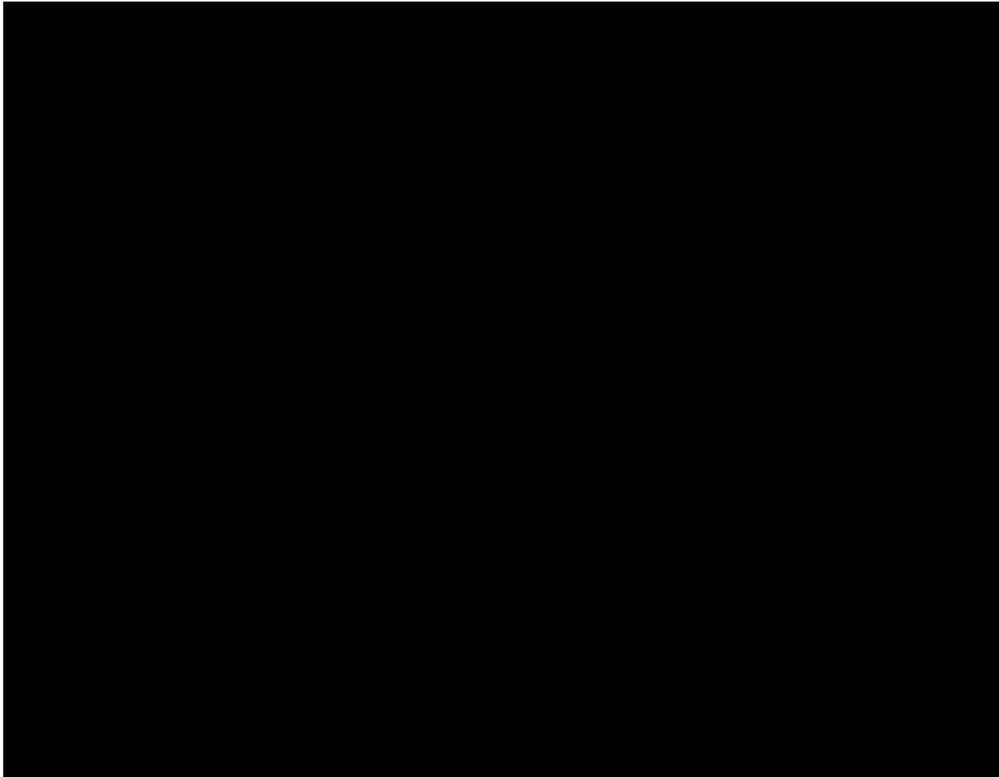








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23. Select the naming convention for the printed PDF files.

-

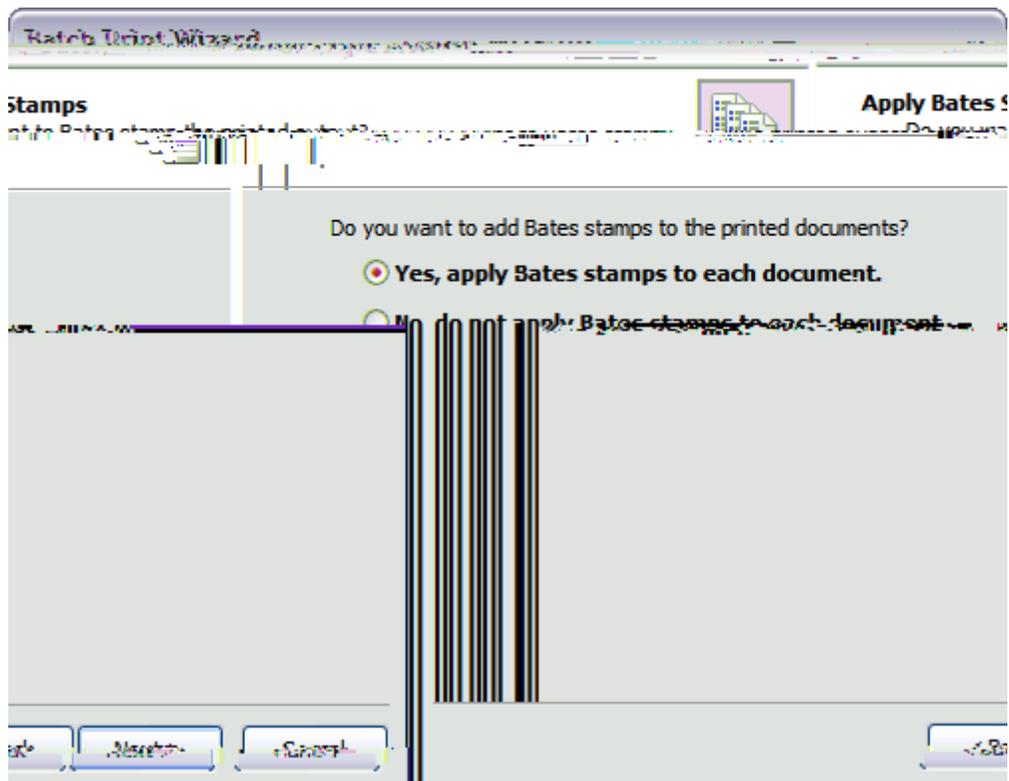
27. Click the link **Click here to open the output folder** to review the printed output.
28. Click **Finish** to close the wizard.



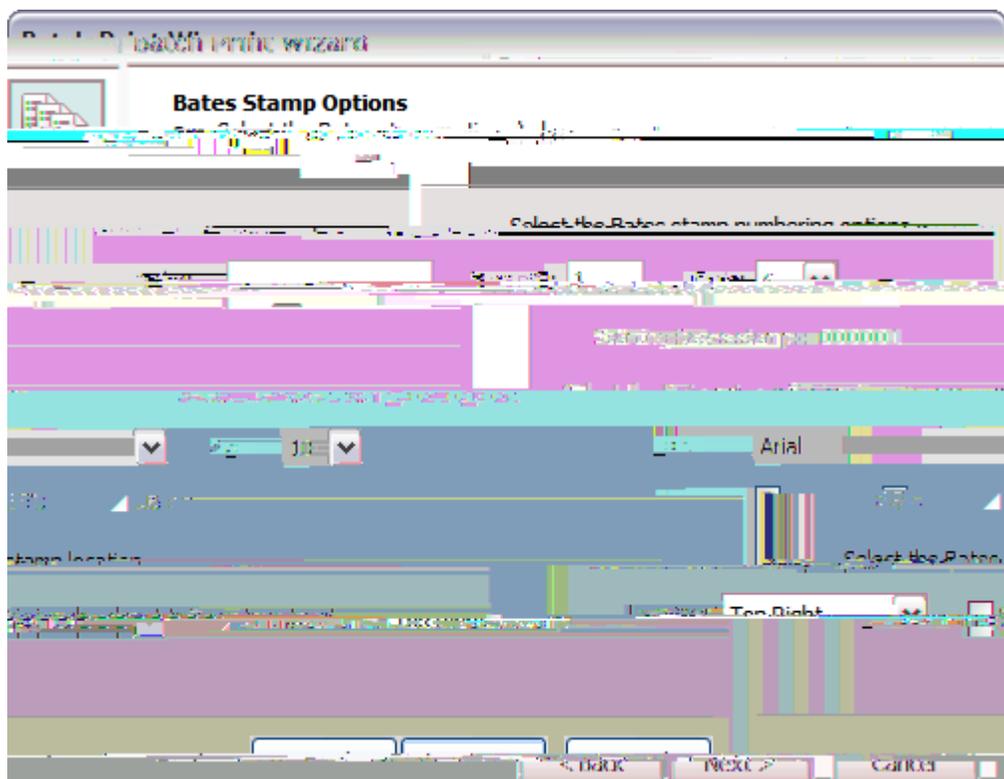








10. In the **Bates Stamp Options** dialog box, select your Bates stamp options.









---



## ***Creating and Prnting Repo15(r)-tBooks***

### Benefits of Using ReportBooks

Customize text and graphics on ReportBook templates

Share ReportBooks among staff using the case

Retain ReportBook data with confidence because they are compiled independent from spreadsheet views

Use ReportBooks during staff meetings to update them on case progress

Use ReportBooks to provide clients with a polished review of your case analysis

#### Practice using ReportBooks on example case data

One of the best ways to learn how to use ReportBooks included in CaseMap or to experiment with customizing your own, is to practice and experiment using the features with demo data. We recommend that you print and compile ReportBooks using the Hawkins





 To copy a page-text right

1. On the **Right** menu, click **Right** and then click **Make Right**.
2. In the **Make Right**



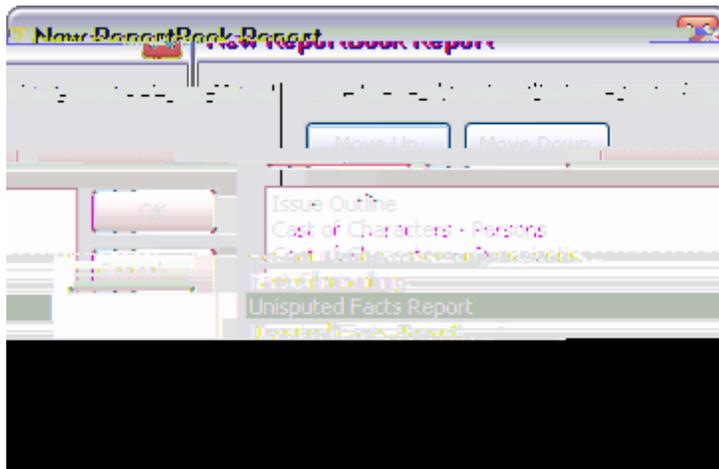










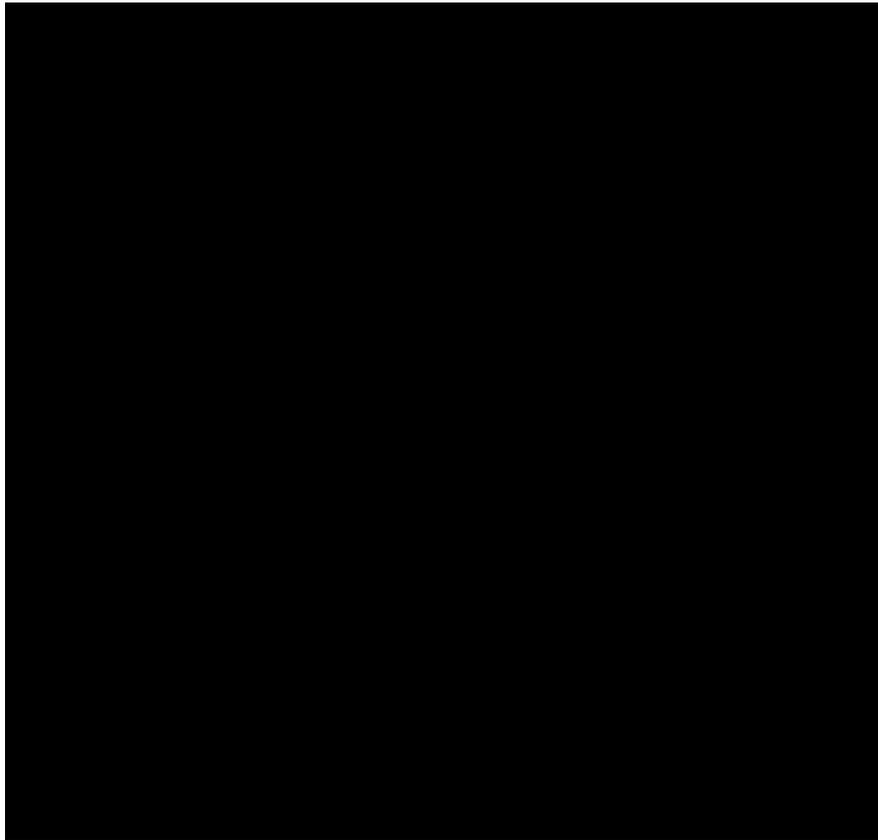


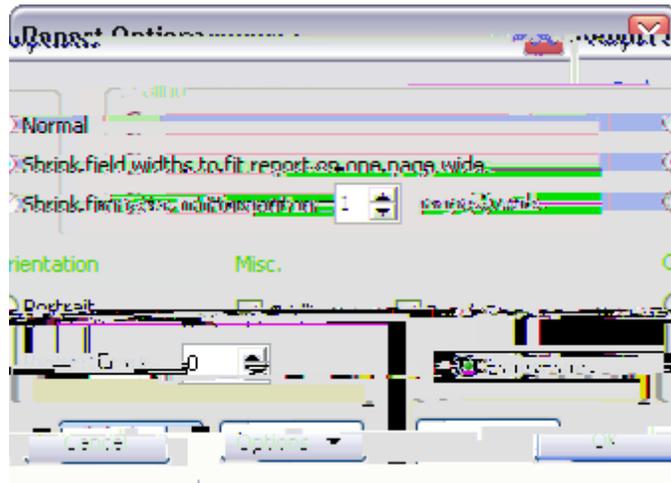
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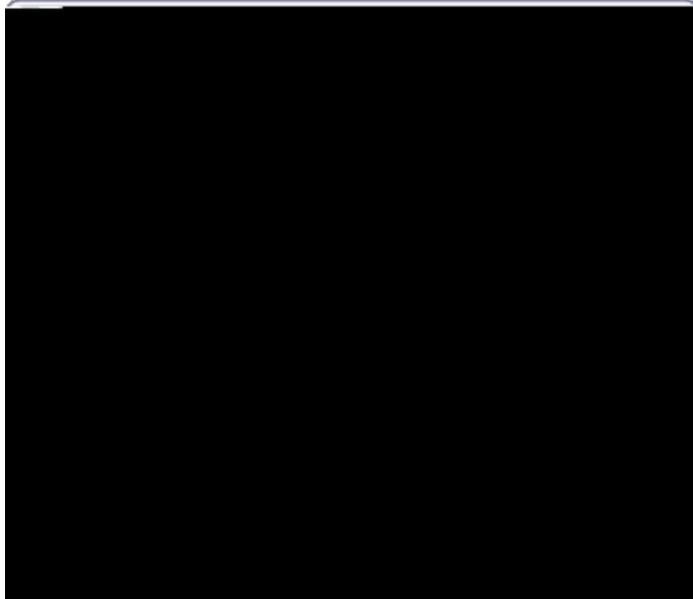








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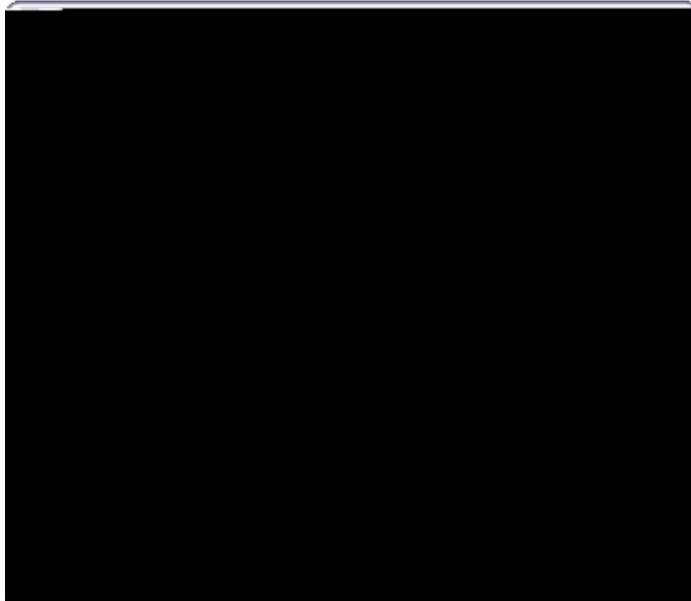












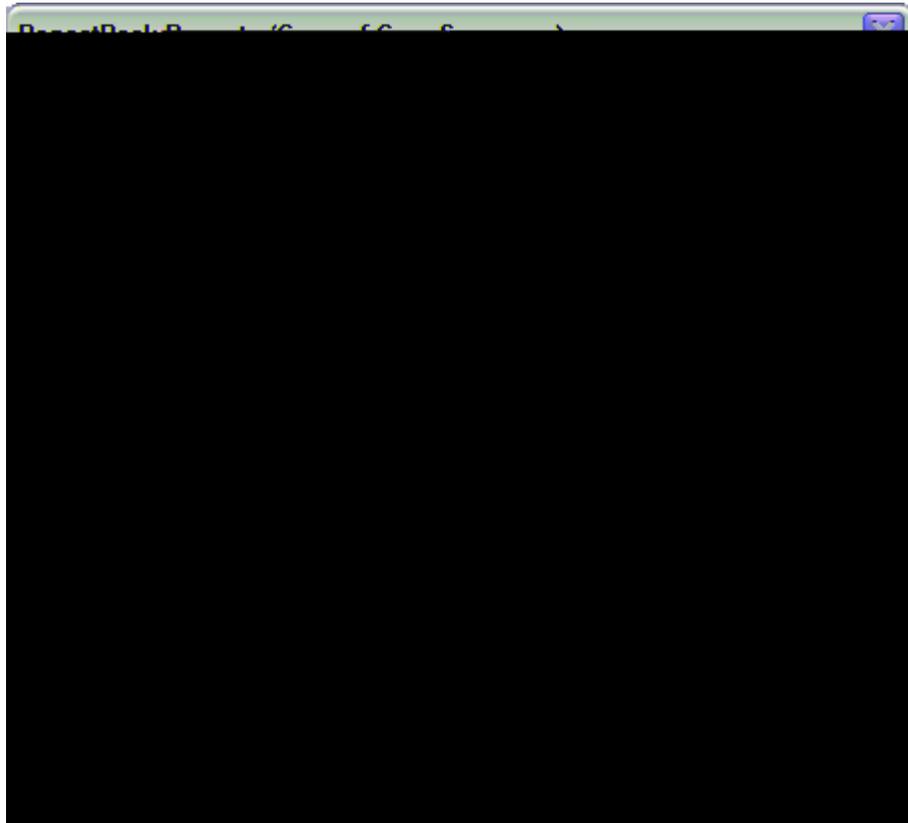
2. In the **Settings** area:
  - Select the **Enabled** check box to use CaseMap's default title page layouts.
  - In the **Orients**



6. Click the **Preview** button to review your changes.
7. Click **OK** to save the changes.

To modify reports

1. In the **Customize ReportBook** dialog box, click the **Reports** button.
2. In the **ReportBooks Reports** dialog box, select or clear check boxes for the reports you want to include in the ReportBook.





within the ReportBook.

10. In the **Manage ReportBooks** dialog box, click **Close** when you are finished modifying this ReportBook.
  
4. Click **Print** to select your print optionk

8. Click **OK** to continue.







3. In the **Print Preview**

 To review report considerations with linked documents









*A UbU[ ]b[ `FYdcfH6cc\_g]bj c] Yg'H Y'Zc`ck ]b[.*





Export File Format Options	
File Format	Description

*9l dcfhXUHJ'lc h Y Zc`ck ]b[ 'hYl hZ]Y Zcfa Uhg.*

- **Delimited text files** — A text file where each field value is separated by a comma or tab character.











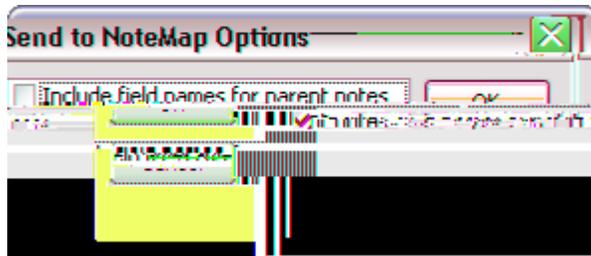






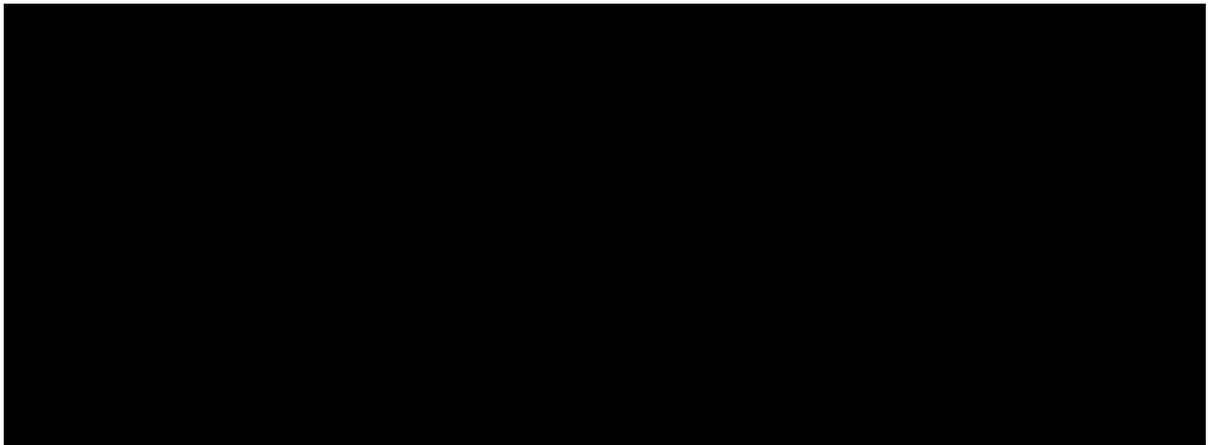


5. In the next dialog box, select the check box for each field you want to include as a child note in the NoteMap outline, then click **OK**.
6. In the next dialog box, click the **Move Up** and **Move Down** buttons to organize the child note field order, then click **OK**.
7. In the next dialog box, select the check boxes on whether to include the field names for parent and child notes, then click **OK**.



## **Exporting data to Word, WordPerfect, HTML**

In CaseMap, you can send all data in two clicks from a spreadsheet to Microsoft® Word, Corel WordPerfect, or an HTML file where it displays in a grid view as a horizontal table of columns and rows. You can also export data into a record view, where the fields from a spreadsheet



[☰ To export data to Excel](#)









## Dialog box keyboard shortcuts

The following list includes the default keyboard shortcuts you can use in CaseMap for dialog boxes. You can also customize keyboard shortcuts.

### Keyboard Shortcuts: Dialog Boxes

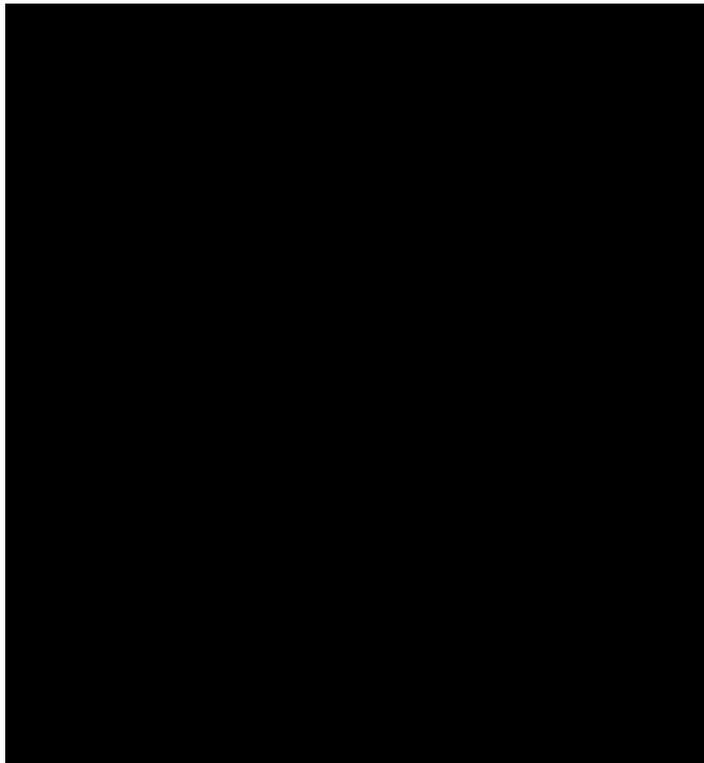
### **Bates numbering keyboard shortcuts**

The following list includes the keyboard shortcuts you can use in Documents spreadsheet's Bates–Begin and Bates–End cells. These keyboard shortcuts are only applicable when populating cells for a new record or adjusting Bates numbers. Editing the Bates numbering cell

2. Click the **Keyboard** button to open the Customize Keyboard dialog box.
3. In the **Categories** list, select the menu for which you want to assign a command.



4. In the **Commands** list, select the command (or action) you want to use.



3. Locate the category and command for the keyboard shortcut.
4. In the **Current keys** box, highlight the keyboard combination and click the **Remove** button.
5. Click **Close** twice to return to CaseMap.

# Index





facts

deleting 165

entering 165

sending from a PDF file 261

sending from a Word document 251



linking

link multiple issues 281

locate a linked authority 301





searching  
    viewing search history 369  
    viewing search results 354  
security  
    applying for fields 109  
Send to CaseMap  
    creating new extracts from annotations 274,  
    389  
    creating new facts from annotations 274, 389  
Send to CaseMap



Word	
view a document in CaseMap	251
WordPerfect	
exporting data to WordPerfect	573