# Using CaseMap

CaseMap®, Version 14

- Navigating CaseMap
- Getting Started
- Working with Cases
- Spreadsheets and Fields
- Entering Data
- Importing Data
- Analyzing and Linking Data
- Case Evaluation
- Casewide Fact Timeline
- Sorting and Filtering Data
- Search
- Documents
- Tagging Data
- Reporting
- Exporting Data
- Keyboard Shortcuts

LexisNexis®

# CaseMap User Guide

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CaseMap®
DocPreviewer™
DocManager™
CaseMap® Server
TextMap®
TimeMap®
Sanction®

Version: CaseMap® 14
Release Date: January 14, 2019

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# About CaseMap

## Chapter 1

# About CaseMap

CaseMap is a case organization and analysis tool that will help you track and build case strategy. CaseMap helps you organize critical information about facts, documents, and issues in cases by providing the tools you need to analyze facts and issues. CaseMap also helps you quickly create case reports for case staff, your client, and the court.

As you analyze cases in CaseMap, you will gain a thorough understanding of disputes and clarify your strategies in supporting case arguments. As you sort out what you know about each case, you will find it easier to identify what you don't know and need to find out. CaseMap helps ensure complete discovery, regardless of the type of case (civil or criminal).

## ⊟ Share case access to ensure efficiency

CaseMap cases can be used by multiple case staff — at the same time. The case created should be stored in a shared location on your network to ensure that all users can access it. In this manner, all case users are able to work together to organize critical knowledge about the facts, the cast of characters, documents, and the issues regarding the case.

## ⊟ Allow CaseMap to work on your behalf

CaseMap is designed to manage the requirements of capturing information about case facts, documents, and issues. It is flexible and customizable to handle the unique needs of your cases.

Investing the time to organize and share case knowledge in CaseMap means saving time and energy to analyze, strategize, file motions and briefs, negotiate settlements, and take cases to trial.

Even if you have not worked on the case for months, CaseMap keeps case knowledge, documents, and strategy preserved so you can quickly pick up where you left off.

## ⊟ Learn what's new in CaseMap

CaseMap continues to bring new and exciting features that make it work smarter and harder.

For more information, see What's New in CaseMap.

Related Topics

What's New in CaseMap

# What's New in CaseMap

Chapter

2

# What's New in CaseMap

The following enhancements are included in CaseMap 14. For more release information, see the Release Notes.

## CaseMap 14

### ⊟ Fact Dashboard

You can use the Fact Dashboard to quickly assess the strength of your case and identify issues and facts that need the most work.

See Fact Dashboard for more information.

### ⊟ Share custom spreadsheet views

You can share custom spreadsheet views with other case staff.

See Sharing custom views for more information.

### ⊟ Use History Report

You can now export a case's use history to CSV file for offline review.

See Reviewing Use History for more information.

### ⊟ Document Production Enhancement

You can now produce documents with custom Bates stamps without changing the existing Bates stamp fields. Each production appends the new Prod Bates Range field with a new range, which can assist in auditing.

See Document production for more information.

### ⊟ Fact Card Enhancements

To help you review your facts more effectively, you can now open all the text on fact cards in a bigger viewing window. Also to help you apply issues to facts, branching controls added to the Issues list allow you to expand and collapse sub-issues as needed.

See Fact Cards and for more information.

### ⊟ Admins tool for unlocking case files

Administrators now have the ability to clear locks placed on case files, so that users can continue to work in the case without disruption.

See CaseMap Case Unlocker for more information.

### ⊟ Remove entities singly from object recognition

You can remove individual instances of recognized entities sending objects to CaseMap from DocManager.

See About Object Recognition for Fact Entry for more information.

### Search for text from within DocManager

You can search within the open document in DocManager without having to switch back to CaseMap.

See Search in DocManager for more information.

**Related Topics**

About CaseMap
Release Notes

# Using CaseMap

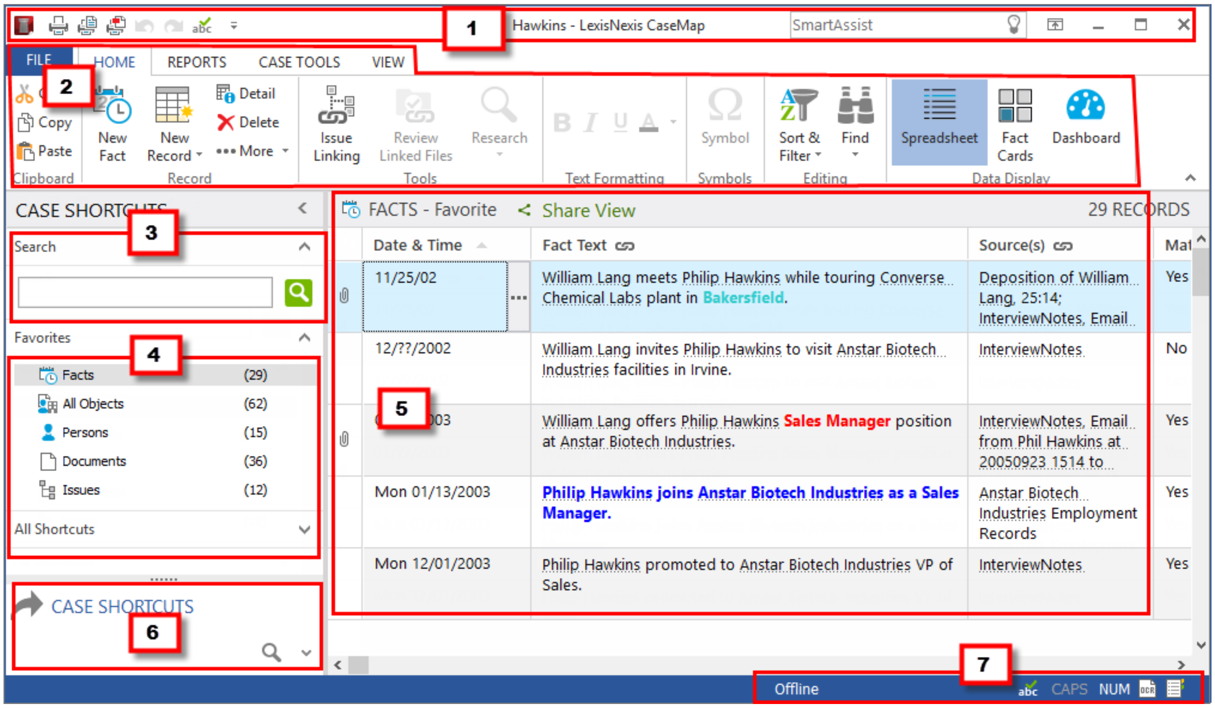
## Chapter
## 3

# Using CaseMap

## *Navigating CaseMap*

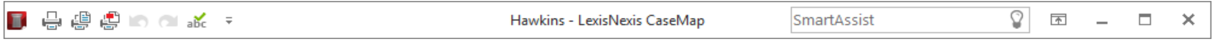
### Navigating CaseMap

This topic describes the main navigation features in CaseMap.


1
Hawkins - LexisNexis CaseMap
SmartAssist
FILE
HOME
REPORTS
CASE TOOLS
VIEW
2
Copy
Paste
Clipboard
New Fact
New Record
Detail
Delete
More
Record
Issue Linking
Review Linked Files
Research
Tools
B I U A
Text Formatting
Symbol
Symbols
Sort & Filter
Find
Editing
Spreadsheet
Fact Cards
Dashboard
Data Display
CASE SHORTCUTS
3
Search
Favorites
4
Facts (29)
All Objects (62)
Persons (15)
Documents (36)
Issues (12)
All Shortcuts
CASE SHORTCUTS
6
FACTS - Favorite
Share View
29 RECORDS
5
7
Offline
CAPS
NUM

| Date & Time | Fact Text | Source(s) | Mat |
|---|---|---|---|
| 11/25/02 | William Lang meets Philip Hawkins while touring Converse Chemical Labs plant in Bakersfield. | Deposition of William Lang, 25:14; InterviewNotes, Email | Yes |
| 12/??/2002 | William Lang invites Philip Hawkins to visit Anstar Biotech Industries facilities in Irvine. | InterviewNotes | No |
| 03 | William Lang offers Philip Hawkins **Sales Manager** position at Anstar Biotech Industries. | InterviewNotes, Email from Phil Hawkins at 20050923 1514 to | Yes |
| Mon 01/13/2003 | **Philip Hawkins joins Anstar Biotech Industries as a Sales Manager.** | Anstar Biotech Industries Employment Records | Yes |
| Mon 12/01/2003 | Philip Hawkins promoted to Anstar Biotech Industries VP of Sales. | InterviewNotes | Yes |

1. Title Bar. Consist of the following components, from left to right:


Hawkins - LexisNexis CaseMap
SmartAssist

- Quick Access Toolbar. This is a group of frequently used commands, situated on the left corner of the title bar. To customize, right click the toolbar, then select **Customize Quick Access Toolbar.** For more information, see: Customize the Quick Access Toolbar.
- Case name is centered.
- SmartAssist provides specialized search within the case or search directed at the LexisNexis Research service. For more information, see: SmartAssist search assistant.
- The Ribbon Display Options button (⊡) allows you to control whether the ribbon hides, shows just the tab names, or shows both the ribbon and tab names.

2. Menu tabs and toolbar ribbons. Provides access to CaseMap commands. In the screenshot above, the HOME tab is selected.

3. Search bar. Provides full-text search across all case materials.

4. Spreadsheet shortcuts. Provides links for opening spreadsheets.

- To open spreadsheets for Questions, Pleadings, Research, and other spreadsheets, expand **All Shortcuts**.

5. Spreadsheet workspace. Provides access to spreadsheet records for data entry and review.

In the screenshot above, the Facts spreadsheet is open. Note that the Facts spreadsheet also provides a Fact Card view and a Fact Dashboard. For more information about spreadsheets, see: About spreadsheets.

6. CASE SHORTCUTS. Switches the view of the leftmost panel between spreadsheet shortcuts and search results.

7. Status bar. Displays the status of the spell checker, caps lock, number lock, and background processes for optical character recognition and full text indexing. To check the status of the optical character recognition (OCR) or indexing processes, point to their icons. Status displays in the lower left corner of CaseMap.

Related Topics

- About the Navigation pane
- Modifying Navigation pane display
- About CaseMap toolbar buttons
- Changing toolbar settings and buttons

## About the Navigation pane

The Navigation pane is a vertical bar located on the left side of your screen when you open a case in CaseMap. CaseMap's Navigation pane has two task panes: Case Shortcuts and Search Results. The default setup is to display the Case Shortcuts pane, which allows you to easily transfer from working in one case spreadsheet to another. The Search Results pane displays after a full-text search is run and provides search results and access to reports.

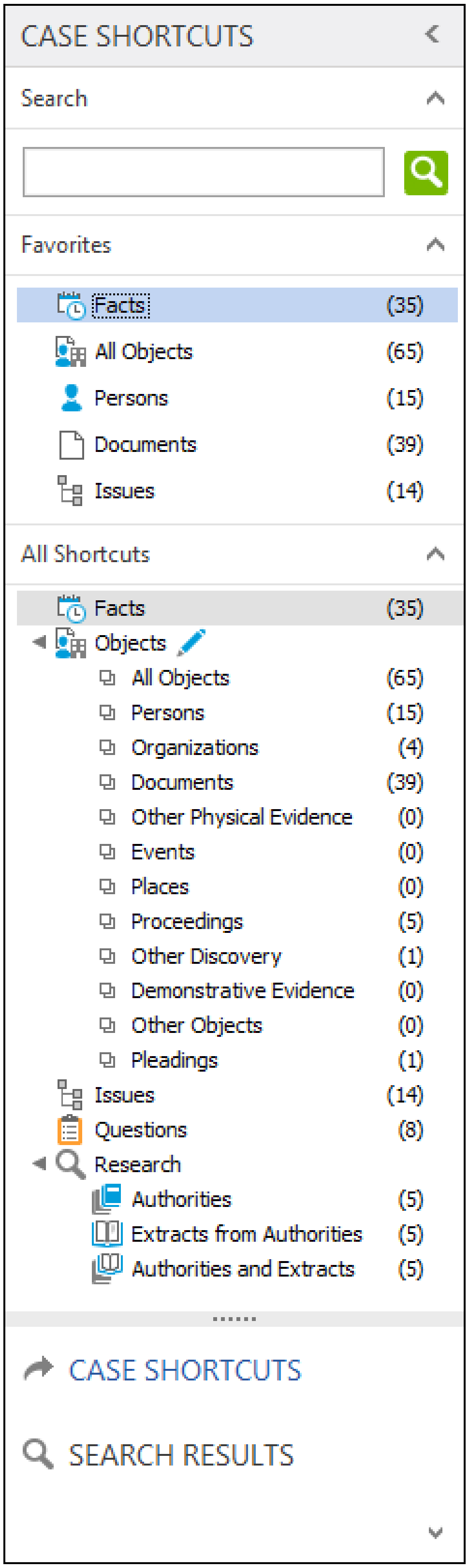
**CaseMap Navigation Pane**

| **Elements** | **Description** |
|---|---|
| Case Shortcuts | Use to navigate CaseMap spreadsheets, which are organized in two different task panes: Favorites and All Shortcuts. |
| Search Results | Use to review search results, narrow search results, or access search reports. |
| Arrow Bar | Use to show/hide buttons to maximize viewing within the Navigation pane. |

⊟ **Case Shortcuts pane**

The Case Shortcuts pane has three tasks panes:

- **Search** pane — Allows full-text searches to be run on case records and linked files.
- **Favorites —** Contains icons for the spreadsheets used most often: Facts, All Objects, Persons, Documents, Issues. You can modify the icon display to suit your preferences.
- **All Shortcuts —** Contains icons for all spreadsheets, including individual object spreadsheets. Each spreadsheet icon also displays the current number of records for each. Simply click on an icon to display that spreadsheet in the main CaseMap window.



CASE SHORTCUTS

Search

Favorites

| | |
|---|---|
| Facts | (35) |
| All Objects | (65) |
| Persons | (15) |
| Documents | (39) |
| Issues | (14) |

All Shortcuts

| | |
|---|---|
| Facts | (35) |
| Objects | |
| All Objects | (65) |
| Persons | (15) |
| Organizations | (4) |
| Documents | (39) |
| Other Physical Evidence | (0) |
| Events | (0) |
| Places | (0) |
| Proceedings | (5) |
| Other Discovery | (1) |
| Demonstrative Evidence | (0) |
| Other Objects | (0) |
| Pleadings | (1) |
| Issues | (14) |
| Questions | (8) |
| Research | |
| Authorities | (5) |
| Extracts from Authorities | (5) |
| Authorities and Extracts | (5) |

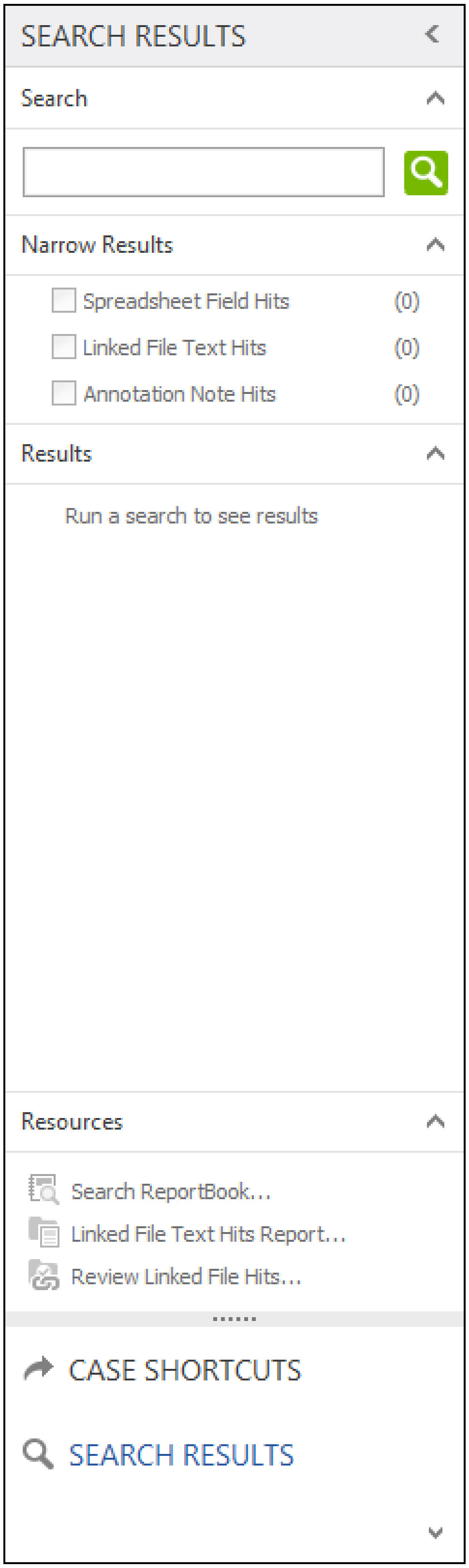
CASE SHORTCUTS

SEARCH RESULTS

## ⊟ Search Results pane

The Search Results pane displays search results for spreadsheet hits as well as any linked document hits.

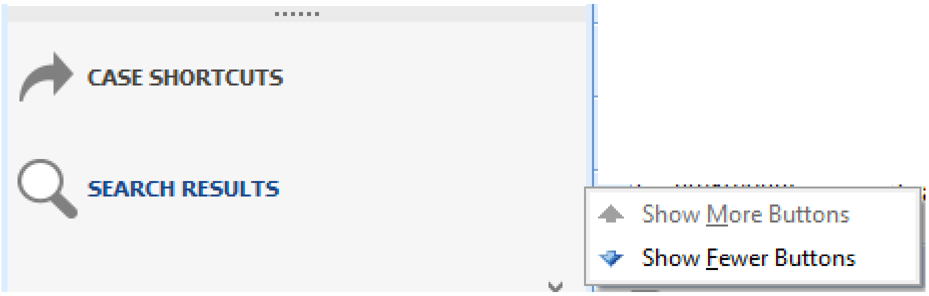
- **Search** pane — Allows full-text searches to be run on case records and linked files.
- **Narrow Results** pane — Provides options for narrowing search results by search hits located in spreadsheets, linked file content, and annotation notes.
- **Results** pane — Displays all spreadsheets that contain records or linked files with search hits. The number of search hits located for each displays to the right of the spreadsheet name.
- **Resources** pane — Provides access to three search results reports.


SEARCH RESULTS
Search
Narrow Results
☐ Spreadsheet Field Hits (0)
☐ Linked File Text Hits (0)
☐ Annotation Note Hits (0)
Results
Resources
Search ReportBook...
Linked File Text Hits Report...
Review Linked File Hits...
CASE SHORTCUTS
SEARCH RESULTS

Run a search to see results

### Arrow bar

The Arrow bar allows you to collapse or expand buttons to maximize the pane view.


CASE SHORTCUTS
SEARCH RESULTS
Show More Buttons
Show Fewer Buttons

Related Topics

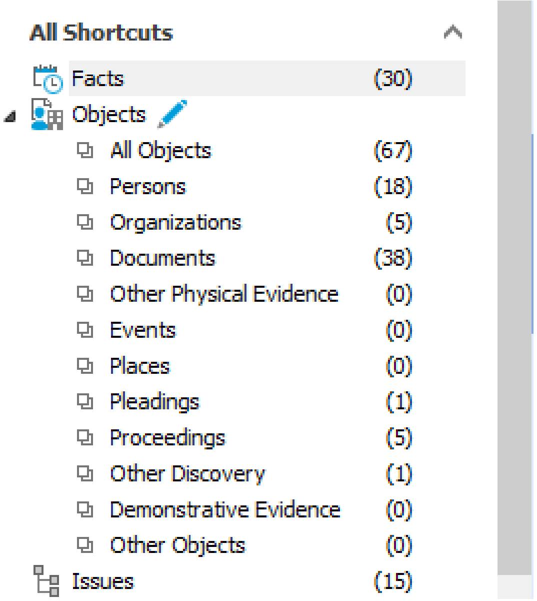
[Navigating CaseMap](#)
[Modifying Navigation pane display](#)

## Modifying Navigation pane display

You can modify the display of the Navigation pane to suit your viewing preferences: move the task pane buttons, resize the Navigation pane, and hide the Navigation pane.

### To maximize the Case Shortcuts pane for better viewing

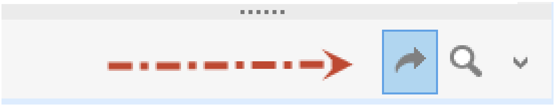
To change the height or width of the Navigation pane, drag the split bars to the left or right or up or down.



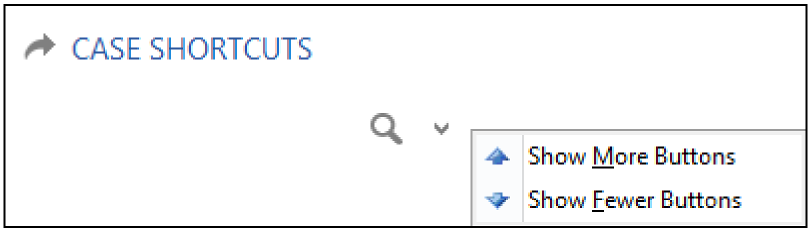
**All Shortcuts**

| | |
|---|---|
| Facts | (30) |
| Objects | |
| All Objects | (67) |
| Persons | (18) |
| Organizations | (5) |
| Documents | (38) |
| Other Physical Evidence | (0) |
| Events | (0) |
| Places | (0) |
| Pleadings | (1) |
| Proceedings | (5) |
| Other Discovery | (1) |
| Demonstrative Evidence | (0) |
| Other Objects | (0) |
| Issues | (15) |

As you pull the bottom split bar down, the Navigation pane buttons change into icons on the lower bar.

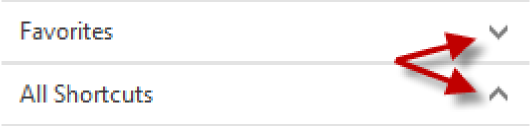


You can also, click the arrow on the lower bar and select Show More Buttons or Show Fewer Buttons to maximize the pane view.



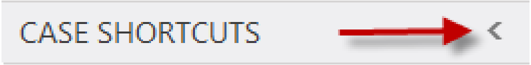
### ⊟ To hide task panes for better viewing

To show/hide task panes or the Navigation pane, click the Expand/Collapse buttons. For example, if you prefer navigating your spreadsheets from the All Shortcuts task pane, you may want to hide the Favorites pane from view so you can see the full listing of individual object spreadsheets.



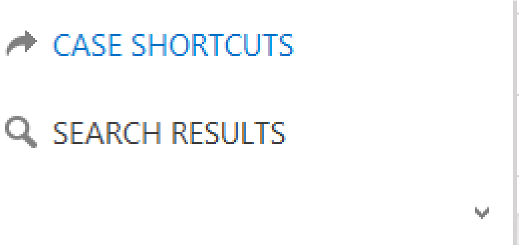
### ⊟ To hide the Navigation pane to maximize the spreadsheet view

To maximize a spreadsheet's view on-screen, click on the Collapse button to pin the Navigation pane to the left side of CaseMap. The Navigation pane can easily be expanded and locked on-screen when you need to use it more frequently.



### ⊟ To change the Navigation pane display

To change the Navigation pane display, click on the respective pane's button.



Related Topics

[Navigating CaseMap](#)
[Changing shortcuts in the Favorites pane](#)

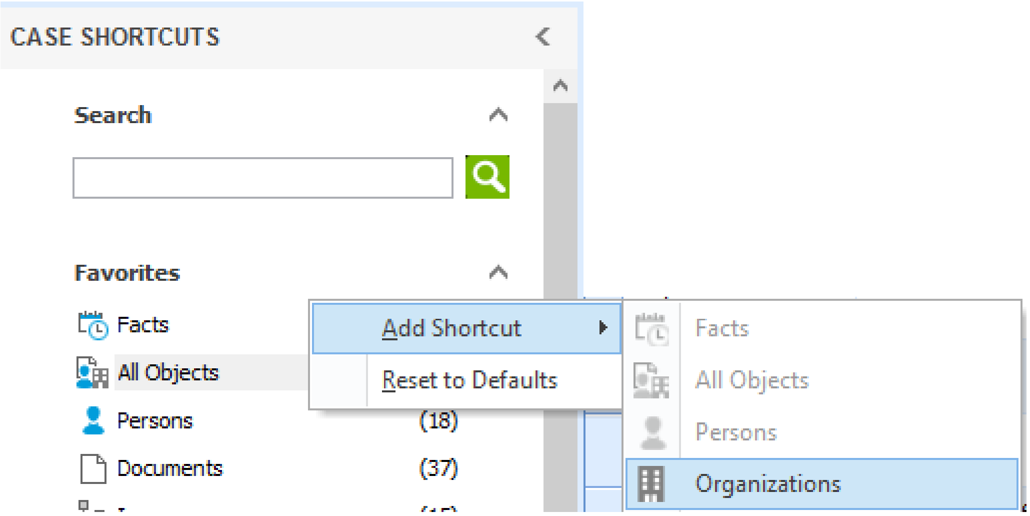
## Changing shortcuts in the Favorites pane

The Favorites pane includes default shortcuts to the following spreadsheets: Facts, All Objects, Persons, Documents, and Issues. You can modify the icons that display in this task pane for those you use most often. And you can rearrange them by preference.

When you customize your Favorite Shortcuts in a case, the settings are saved for your view only. When another user opens a case, CaseMap displays that case's default or custom shortcuts specific to that user.

### ⊟ To add a spreadsheet icon to the Favorites pane

Right-click in the Favorites pane, click Add Shortcut, and then select the applicable spreadsheet.


CASE SHORTCUTS
Search
Favorites
Facts
All Objects
Persons
(18)
Documents
(37)
Add Shortcut
Reset to Defaults
Facts
All Objects
Persons
Organizations

### ⊟ To reorganize spreadsheet icon order

Right-click and then click Move Up in List or Move Down in List.

### ⊟ To remove a spreadsheet icon from the Favorites pane

Right-click on the shortcut you want to remove and then click Remove from Favorites.

### ⊟ To reset the spreadsheet icon default order

Right-click and then click Reset to Defaults.

Any spreadsheets other than the original default choices are removed from this pane.

Related Topics

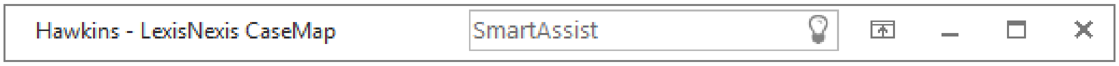
- Navigating CaseMap
- Modifying Navigation pane display
- About spreadsheets

## Title and status bars

CaseMap provides title bars and a status bar to help you remain oriented while using the program.

### *CaseMap application title bar*

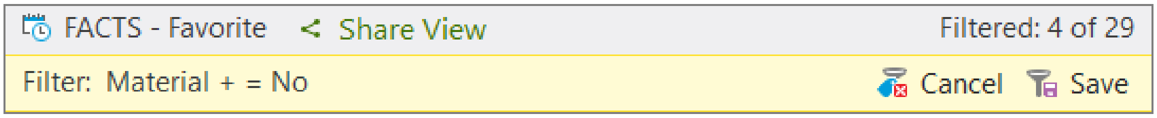
Displays the name of the open case, provides the SmartAssist search bar, and the Ribbon Display Options button.



- To search for keywords within the case or to direct a search at LexisNexis Research, enter keywords in the SmartAssist bar, then select the search scope.
- To control whether the ribbon hides, shows just the tab names, or shows both the ribbon and tab names, click the Ribbon Display Options button (⊡) and then select an option.

### *Spreadsheet title bar*

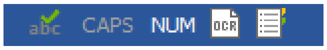
Displays the spreadsheet name, the name of the view, and a count of the records showing. Is a search was run, the search criteria are displayed beneath the bar.



- To share the current view with other case users, click Share View. For more information, see: Sharing spreadsheet views.
- To clear the search, click **Cancel**.
- To save the search, click **Save**.

### *Status bar*

Located in the bottom right corner of CaseMap, shows whether spell check is running, and whether the keyboard caps lock and number lock are engaged.



- To see the status of the optical character recognition (OCR) or indexing processes, point to their icons. The status displays in the lower left corner of CaseMap.

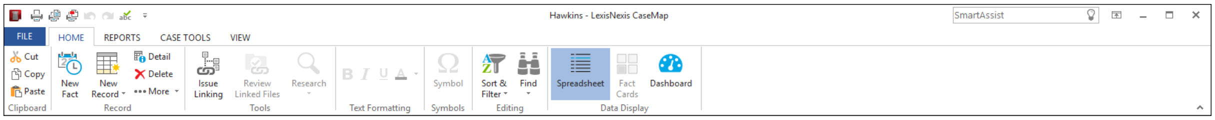
**Related Topics**

Navigating CaseMap

## Toolbar buttons

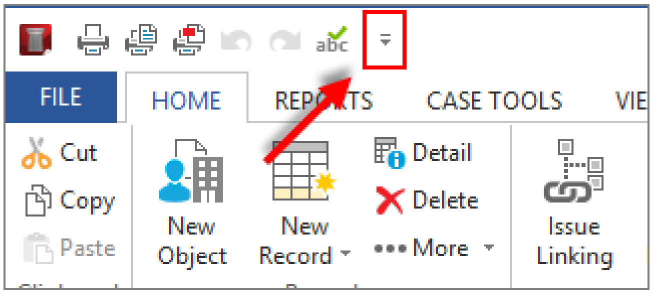
CaseMap uses ribbons instead of the Standard toolbar for its default display of the most commonly used buttons and functions. Click on a tab and place your mouse pointer over each button and/or menu item to view its name and a brief functional description.

You can use the Windows standard toolbar instead of the ribbon by going to the File Tab > Options > Accessibility and then select the 'Use standard Windows menu in place of ribbon' check box. This option allows screen readers to call out the menu items.

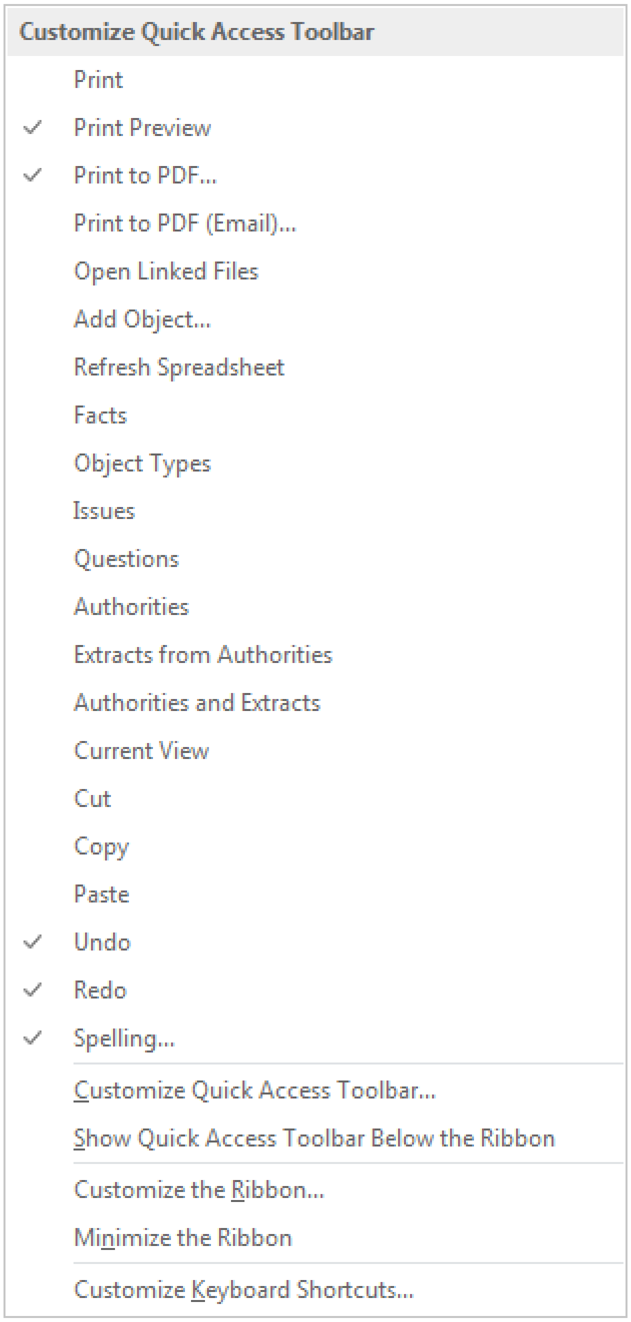

Hawkins - LexisNexis CaseMap
SmartAssist
FILE
HOME
REPORTS
CASE TOOLS
VIEW
Cut
Copy
Paste
Clipboard
New Fact
New Record
Detail
Delete
More
Record
Issue Linking
Review Linked Files
Research
Tools
Text Formatting
Symbol
Symbols
Sort & Filter
Find
Editing
Spreadsheet
Fact Cards
Dashboard
Data Display

## To show or hide buttons

1. Click the More Buttons ▿ icon in the upper left corner of the Quick Access Toolbar.


FILE
HOME
REPORTS
CASE TOOLS
VIE
Cut
Copy
Paste
New Object
New Record
Detail
Delete
More
Issue Linking

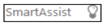
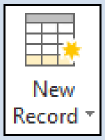
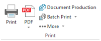
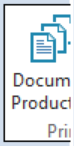
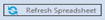
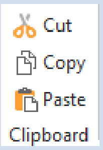
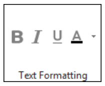
2. Select or clear the check from buttons to add/remove them. All checked buttons display on the toolbar.


Customize Quick Access Toolbar
Print
✓ Print Preview
✓ Print to PDF...
Print to PDF (Email)...
Open Linked Files
Add Object...
Refresh Spreadsheet
Facts
Object Types
Issues
Questions
Authorities
Extracts from Authorities
Authorities and Extracts
Current View
Cut
Copy
Paste
✓ Undo
✓ Redo
✓ Spelling...
Customize Quick Access Toolbar...
Show Quick Access Toolbar Below the Ribbon
Customize the Ribbon...
Minimize the Ribbon
Customize Keyboard Shortcuts...

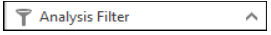
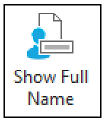
## Toolbar button descriptions

The following table provides a listing of toolbar buttons and descriptions.

## CaseMap Toolbar Buttons

| Button | Name | Description |
|---|---|---|
|  SmartAssist | SmartAssist | Search for keywords in case content or in LexisNexis Research. |
|  | New Record | Add new facts, objects, issues, questions, and authorities for each respective spreadsheet. |
|  Print<br>PDF<br>Document Production<br>Batch Print<br>More<br>Print | Print buttons | CaseMap offers multiple print buttons: Quick Print, Print to PDF/PDF (Email), Batch Print (To Printer, To PDF, To TIFF), More (Print Preview and Page Setup), to include the Document Production wizard. |
|  Docum<br>Product<br>Pri | Document Production | Use this button to trigger the Document Production wizard. |
| | Delete Record | Use the Delete Record button to permanently delete records from the case. |
|  Refresh Spreadsheet | Refresh Spreadsheet | Use to refresh the spreadsheet view to display updated data. |
| | Undo and Redo | Click the Undo and Redo buttons to retrieve deleted information in description fields before leaving the cell. |
|  Cut<br>Copy<br>Paste<br>Clipboard | Cut, Copy, Paste | Use the Cut, Copy, and Paste buttons to remove and copy/paste text in spreadsheet records. |
|  B I U A<br>Text Formatting | Format buttons | Use the Format buttons to adjust font color, size, height, and to underline words or characters. Format buttons are only active when text is selected in certain spreadsheets. |
| | Record Detail | Use the Record Detail button to access a detail dialog box for the selected record particular on the spreadsheet being viewed. |

## CaseMap Toolbar Buttons

| Button | Name | Description |
|---|---|---|
| New Question | Add Question | Use the Add Question button to access a Question Detail dialog box so you can add a question to the Questions spreadsheet while working in another spreadsheet. |
| Define Views... | Define Views | Use the Define Views button to toggle between a spreadsheet's default view and other saved views, including a Favorite view. |
| Advanced Sort... | Advanced Sort | Use the Advanced Sort button to open a dialog box where you can perform multi-level sorting of data on spreadsheets. |
| Row Height 2 | Row Height | Use the Row Height button to adjust the height of spreadsheet records. |
| | CaseWide | Use the CaseWide button to access a graph displaying a visual timeline of facts in your case. CaseWide is available only on the Facts spreadsheet. |
| Linked Authority | Linked Authority | Use the Linked Authority button to toggle between the Extracts from Authorities and the Authorities and Extracts spreadsheets. This button displays only when working in these two spreadsheets. |
| Issue Linking | Issue Linking | Use the Issue Linking button to open the Issue Linking pane so you can link records to multiple issues at one time, add a new issue to the Issues spreadsheet, and access the Analysis Filter to sort issues. Click the drop down arrow to the right of the Analysis Filter heading  to display the Analysis Filter details. |
| Underline Objects | Underline Objects | Use the Underline Objects button to turn on/off whether objects are underlined in spreadsheets. |
|  | Show Full Name | Use the Show Full Name button to turn on/off whether object short names or full names display in spreadsheets. |
| | Research | Use the Research button to access a submenu that offers search options in our LexisNexis companion products, like www.lexis.com, CourtLink, and more. The Research button and submenu changes depending on the spreadsheet being viewed. |

**CaseMap Toolbar Buttons**

| Button | Name | Description |
|---|---|---|
| Review Linked Files | Review Linked Files | Use the Review Linked Files button to open linked files in the Research spreadsheets, like Authorities and Extracts from Authorities. Linked files open in DocManager. |

Related Topics

[Navigating CaseMap]

[Changing toolbar buttons and settings]

## Customize the Quick Access Toolbar

By default the Quick Access Toolbar is located in the upper left corner of CaseMap and provides these commands:

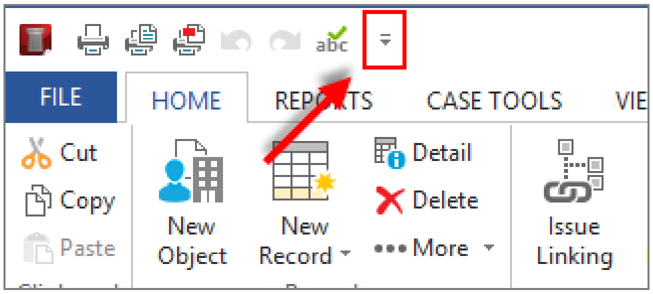
- Quick Print
- Print Preview
- Print to PDF
- Undo and Redo
- Spell Check

However, you can customize the placement of the toolbar as well as the selection of commands it displays.

You can also choose which commands to show on each ribbon, and if needed, reset the ribbon to the system default.

### ⊟ To show or hide commands

1. On the **Quick Access** toolbar, click the **More Buttons** icon in the upper left corner.


FILE
HOME
REPORTS
CASE TOOLS
VIE
Cut
Copy
Paste
New Object
New Record
Detail
Delete
More
Issue Linking

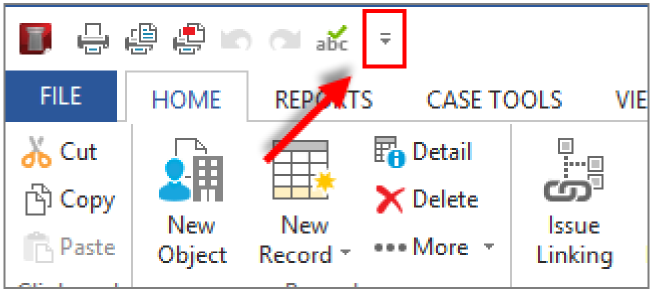
2. To show a button, select its check box. To hide a button, clear its check box.

   Menu items with a check mark display on the toolbar.

   The toolbar display is updated.

### ⊟ To reset all toolbar customizations

1. On the **Quick Access** toolbar, click the **More Buttons** icon in the upper left corner.


FILE
HOME
REPORTS
CASE TOOLS
VIE
Cut
Copy
Paste
New Object
New Record
Detail
Delete
More
Issue Linking

2. Click **Customize the Quick Access Toolbar.**

   The customization dialog box opens.

3. Click **Reset**, and then click **Reset all customizations**.

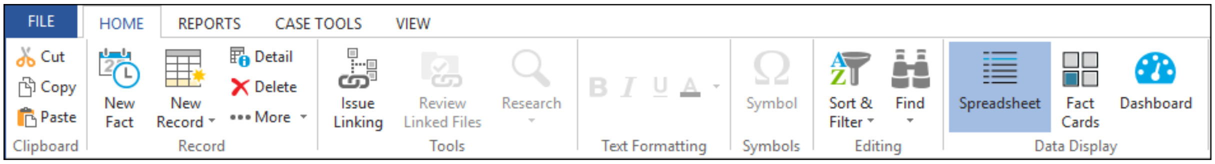
Related Topics

Toolbar buttons
Customize the ribbons
Changing accessibility options
Navigating CaseMap

## CaseMap ribbons

You access different groups of commands in CaseMap by clicking these tabs: FILE, HOME, REPORTS, CASE TOOLS, and VIEW. In addition, these tabs are available, depending on which spreadsheet is open:

- OUTLINE is available when the Issues spreadsheet is open.
- LINKED AUTHORITY tab is available when the Research Authorities and Extracts spreadsheet is open.

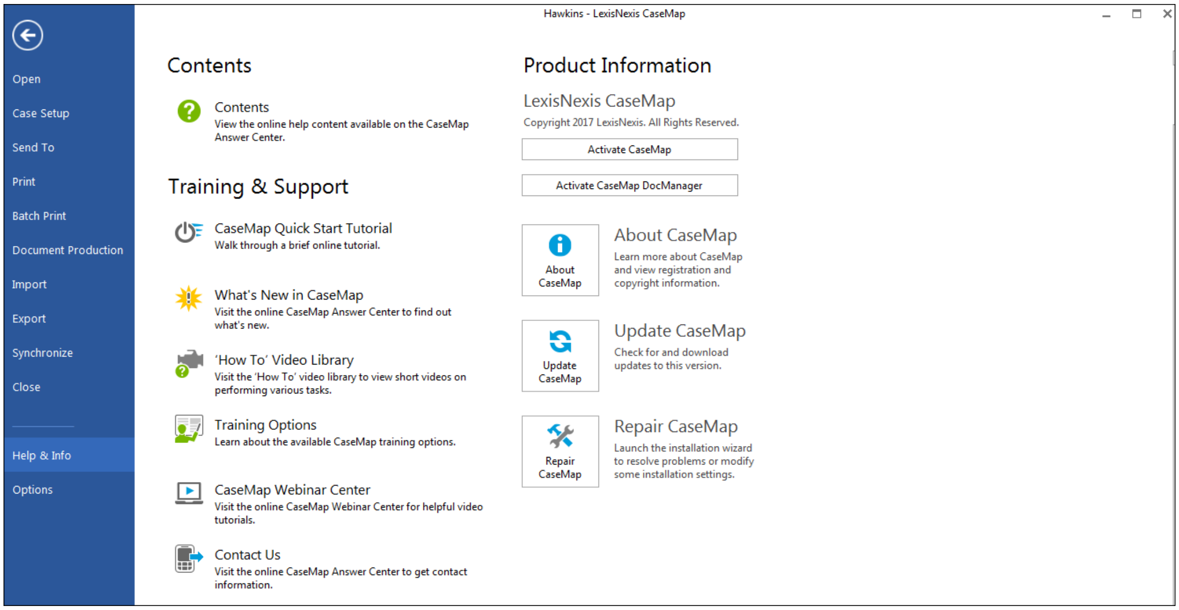

FILE
HOME
REPORTS
CASE TOOLS
VIEW
Cut
Copy
Paste
Clipboard
New Fact
New Record
Detail
Delete
More
Record
Issue Linking
Review Linked Files
Research
Tools
B I U A
Text Formatting
Symbol
Symbols
Sort & Filter
Find
Editing
Spreadsheet
Fact Cards
Dashboard
Data Display

As you move between spreadsheets, the commands available on each tab change, depending on which spreadsheet is open.

## FILE commands

This tab provides commands for working with cases:

- Create a new case or case template.
- Open and close a case.
- Close CaseMap.
- Import, export, and send data.
- Manage users.
- Create case replicas and synchronize data from replicas.
- Find training and online help.
- View case properties.
- View licensing information.
- Get updates to CaseMap and activate CaseMap and DocManager.
- Start the CaseMap maintenance utility, Detect and Repair.


Hawkins - LexisNexis CaseMap
Open
Case Setup
Send To
Print
Batch Print
Document Production
Import
Export
Synchronize
Close
Help & Info
Options
Activate CaseMap
Activate CaseMap DocManager
About CaseMap
Update CaseMap
Repair CaseMap

Contents

Contents
View the online help content available on the CaseMap Answer Center.

Training & Support

CaseMap Quick Start Tutorial
Walk through a brief online tutorial.

What's New in CaseMap
Visit the online CaseMap Answer Center to find out what's new.

'How To' Video Library
Visit the 'How To' video library to view short videos on performing various tasks.

Training Options
Learn about the available CaseMap training options.

CaseMap Webinar Center
Visit the online CaseMap Webinar Center for helpful video tutorials.

Contact Us
Visit the online CaseMap Answer Center to get contact information.

Product Information

LexisNexis CaseMap
Copyright 2017 LexisNexis. All Rights Reserved.

About CaseMap
Learn more about CaseMap and view registration and copyright information.

Update CaseMap
Check for and download updates to this version.

Repair CaseMap
Launch the installation wizard to resolve problems or modify some installation settings.

> If you are using CaseMap Server and have a SQL case open, click About CaseMap and then click the Disabled Features button to verify if any permissions are disabled for your user account. If no permissions are disabled, a message displays to indicate that.

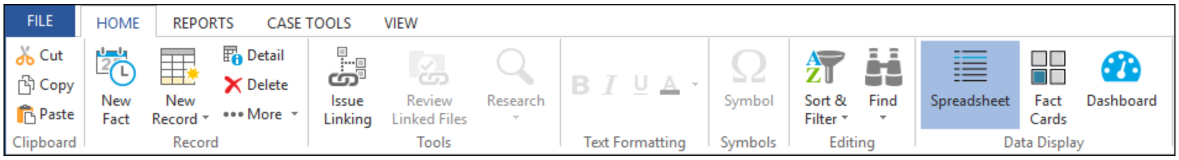
> If you are using CaseMap Server, the File tab has two options for opening a case: Open Local Case and Open SQL Case. The tab also has an option: New Local Case.

## HOME commands

This tab provides commands for editing and formatting text information within a spreadsheet record to accomplish the following tasks:

- Cut, copy, and paste text.
- Find and replace in records.
- Sort and filter spreadsheet.
- Switch between views of the Fact spreadsheet: List View (spreadsheet), Fact Cards, and Fact Dashboard.
- Add or delete records.
- Change the format and fields in the spreadsheet.
- Insert a copy of a record into the spreadsheet.
- Insert a symbol, like a registered trademark
- View the fields, metadata, evaluations, and more by opening the record details.
- Open files linked to a record.

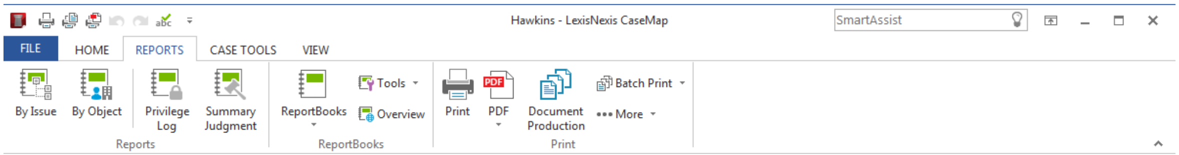
- Type search terms into the SmartAssist search bar to find matches either within the case or from LexisNexis Research.


FILE
HOME
REPORTS
CASE TOOLS
VIEW
Cut
Copy
Paste
Clipboard
New Fact
New Record
Detail
Delete
More
Record
Issue Linking
Review Linked Files
Research
Tools
B I U A
Text Formatting
Symbol
Symbols
Sort & Filter
Find
Editing
Spreadsheet
Fact Cards
Dashboard
Data Display

## REPORTS commands

This tab provides commands to accomplish the following tasks:

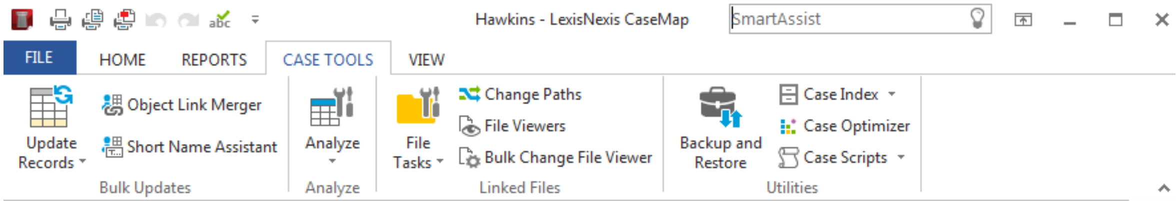
- Run reports.
- Run ReportBooks.
- Run document productions.
- Export report data to other applications.


Hawkins - LexisNexis CaseMap
SmartAssist
FILE
HOME
REPORTS
CASE TOOLS
VIEW
By Issue
By Object
Privilege Log
Summary Judgment
Reports
ReportBooks
Tools
Overview
ReportBooks
Print
PDF
Document Production
Batch Print
More
Print

## CASE TOOLS commands

This tab provides access to tools to accomplish the following tasks:

- Access the Case Optimizer utility.
- Access the indexing and scripting menus.
- Open tools for analyzing and managing case data.
- Perform bulk updates to records and linked files.

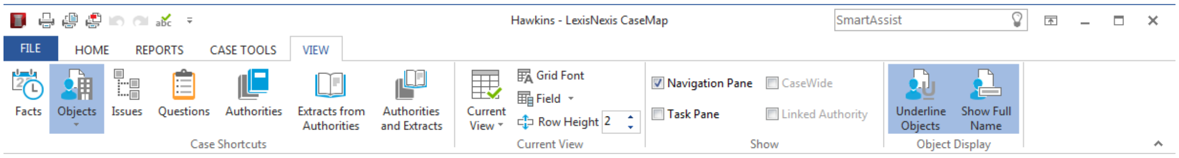

Hawkins - LexisNexis CaseMap
SmartAssist
FILE
HOME
REPORTS
CASE TOOLS
VIEW
Update Records
Object Link Merger
Short Name Assistant
Bulk Updates
Analyze
Analyze
File Tasks
Change Paths
File Viewers
Bulk Change File Viewer
Linked Files
Backup and Restore
Case Index
Case Optimizer
Case Scripts
Utilities

## VIEW commands

These commands modify the CaseMap user interface based on your viewing preference:

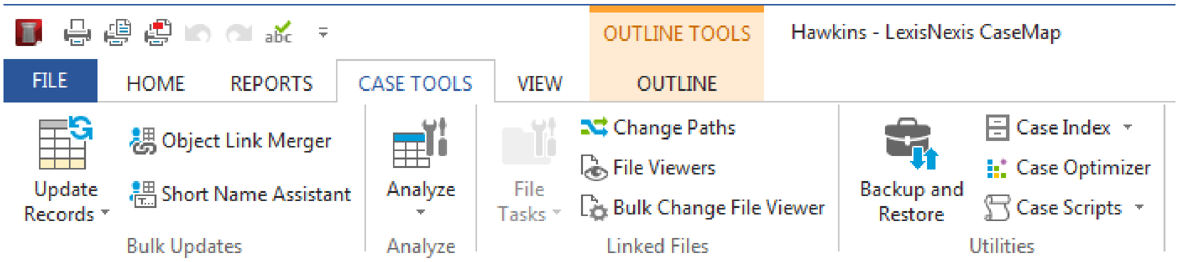
- Show/hide the Navigation and Task panes
- Access CaseWide which allows you to scroll, toggle, and drill-down for different perspectives of your case timeline.
- Access the Linked Authority split-screen view from the Authorities and Extracts spreadsheet.

- Toggle to a different view of the spreadsheet.
- Define and maintain the views on spreadsheets.
- Change the display of short names/full names.


Hawkins - LexisNexis CaseMap
SmartAssist
FILE
HOME
REPORTS
CASE TOOLS
VIEW
Facts
Objects
Issues
Questions
Authorities
Extracts from Authorities
Authorities and Extracts
Case Shortcuts
Current View
Grid Font
Field
Row Height 2
Current View
☑ Navigation Pane
☐ CaseWide
☐ Task Pane
☐ Linked Authority
Show
Underline Objects
Show Full Name
Object Display

## OUTLINE commands

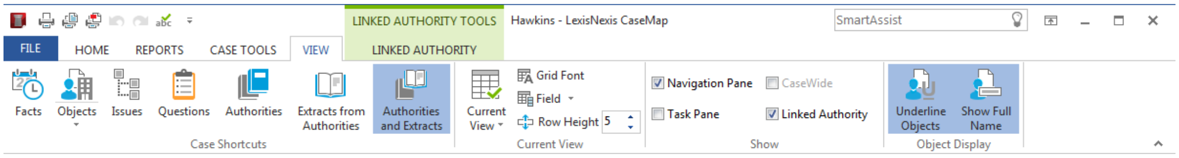
This tab is only accessible when the Issues spreadsheet is selected, and allows you to adjust outline entries and change the number of outline levels displayed.


OUTLINE TOOLS
Hawkins - LexisNexis CaseMap
FILE
HOME
REPORTS
CASE TOOLS
VIEW
OUTLINE
Update Records
Object Link Merger
Short Name Assistant
Bulk Updates
Analyze
Analyze
File Tasks
Change Paths
File Viewers
Bulk Change File Viewer
Linked Files
Backup and Restore
Case Index
Case Optimizer
Case Scripts
Utilities

## LINKED AUTHORITY commands

This tab is only accessible when the Authorities and Extracts spreadsheet is selected. Commands provide the following functionality:

- Create, delete, and/or view record details.
- View and print linked files.
- Customize spreadsheet views.
- Switch between the Extracts from Authorities and the Authorities and Extracts spreadsheets.

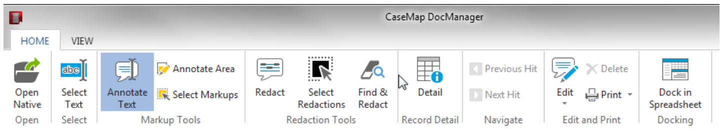

LINKED AUTHORITY TOOLS
Hawkins - LexisNexis CaseMap
SmartAssist
FILE
HOME
REPORTS
CASE TOOLS
VIEW
LINKED AUTHORITY
Facts
Objects
Issues
Questions
Authorities
Extracts from Authorities
Authorities and Extracts
Case Shortcuts
Current View
Grid Font
Field
Row Height 5
Current View
☑ Navigation Pane
☐ CaseWide
☐ Task Pane
☑ Linked Authority
Show
Underline Objects
Show Full Name
Object Display

## DocManager

Use DocManager for the following tasks:

- Review and annotate documents and images without having to open the source file in its native application.
- Add notes to annotations, edit annotations and notes, and also search annotation notes.
- Find search hits faster with hit highlighting and navigation.
- Search within an open document in DocManager.
- Dock and undock documents and/or images in CaseMap using the Dock in Spreadsheet

command.


CaseMap DocManager
HOME
VIEW
Open Native
Open
Select Text
Select
Annotate Text
Annotate Area
Select Markups
Markup Tools
Redact
Select Redactions
Find & Redact
Redaction Tools
Detail
Record Detail
Previous Hit
Next Hit
Navigate
Edit
Delete
Print
Edit and Print
Dock in Spreadsheet
Docking

DocManager must be licensed and activated prior to use.

Related Topics

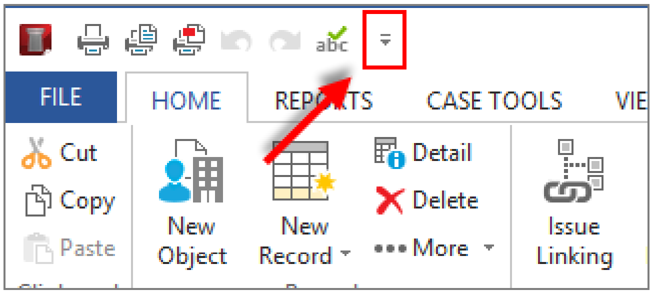
[Navigating CaseMap](#)
[Changing toolbar buttons and settings](#)

## Customize the ribbons

You can customize the ribbons by adding or removing commands, or by adding a new tab, You can also reset the ribbons.

### ⊟ To customize the ribbon

1. On the **Quick Access** toolbar, click the **More Buttons** icon in the upper left corner.

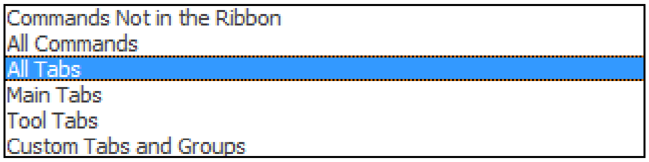

FILE
HOME
REPORTS
CASE TOOLS
VIE
Cut
Copy
Paste
New Object
New Record
Detail
Delete
More
Issue Linking

2. From the menu list, select one of the following:

   ⊟ **Customize the ribbon**

   a. Click **Customize the Ribbon**.

   b. In the **Choose commands from** area of the **Ribbon Customization** dialog box, select the desired command/tab.



Commands Not in the Ribbon
All Commands
All Tabs
Main Tabs
Tool Tabs
Custom Tabs and Groups

The Command display is updated based on the command type selected in the previous step.

c. Under the **Customize the Ribbon** heading, place a check mark next to the tab(s) to be displayed.

d. Use the applicable up or down arrow to place appropriately.

e. **Optional: To add a new tab**

1. Under the **Customize the Ribbon** heading, select the tab/area where the new tab is to be added.
2. Click the **Add** button and then click **Add New Tab**.

   A new tab is added.
3. Click the **Rename** button.
4. In the Display name box, enter a new name for the tab.
5. Click **OK**.

   The new name is displayed.
6. Click **OK** to close the **Ribbon Customization** dialog box.

f. **Optional: To reset customized ribbon settings**

1. Click the **Reset** button and select:

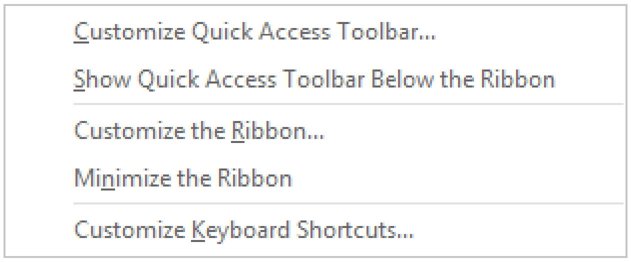
   **Reset only selected tab** to reset only settings for the selected tab.

   **Reset all customizations** to reset all customized settings back to the default system settings.
2. Click **OK**.

### ⊟ To minimize the ribbon

1. On the **Quick Access** toolbar, click the **More Buttons** icon in the upper left corner.

   You can also right-click on a tab (e.g., Home) on the ribbon or right-click on an item on the ribbon to display the menu list.


Customize Quick Access Toolbar...
Show Quick Access Toolbar Below the Ribbon
Customize the Ribbon...
Minimize the Ribbon
Customize Keyboard Shortcuts...

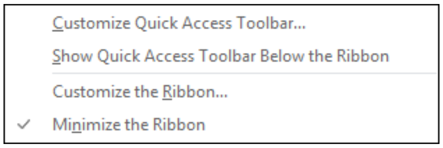
2. Click **Minimize the Ribbon**.

   The Ribbon collapses and is no longer displayed.

> To toggle between display and non-display of the ribbon, you can also click the Ribbon Display Options button located in the upper right-hand corner of the CaseMap display screen.

## To restore the ribbon

1. On the **Quick Access** toolbar, click the **More Buttons** icon in the upper left corner.


Customize Quick Access Toolbar...
Show Quick Access Toolbar Below the Ribbon
Customize the Ribbon...
✓ Minimize the Ribbon

2. Click **Minimize the Ribbon**.

   The Ribbon is displayed.

> To toggle between display and non-display of the ribbon, you can also click the Ribbon Display Options button located in the upper right-hand corner of the CaseMap display screen.

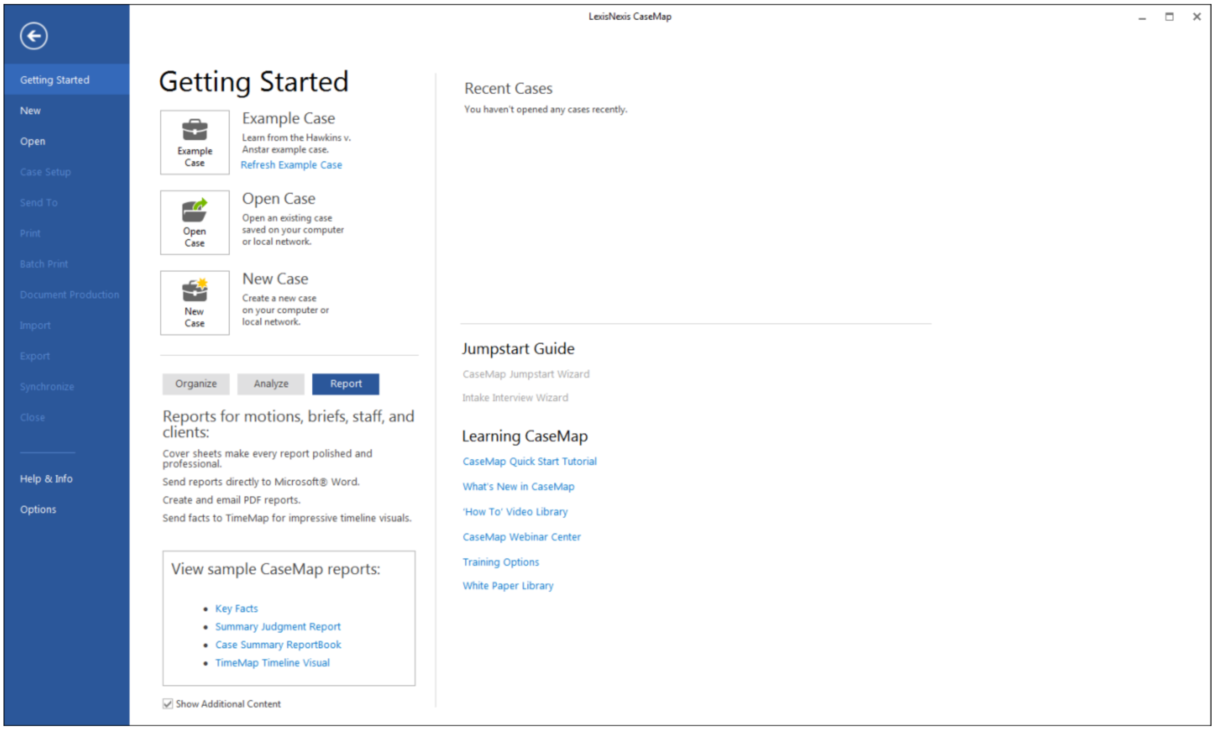
**Related Topics**

About CaseMap toolbar buttons
Changing accessibility options
Navigating CaseMap

# *Getting Started*

## Using the Getting Started tips

When you first open CaseMap, a Getting Started with CaseMap window displays on-screen providing tips on using CaseMap. Place your mouse pointer over the steps for Organize, Analyze, and/or Report to change the tips and links. Each topic (Organize, Analyze, Report) provides concise explanations of basic tasks in the case analysis process.


LexisNexis CaseMap
Getting Started
New
Open
Case Setup
Send To
Print
Batch Print
Document Production
Import
Export
Synchronize
Close
Help & Info
Options
Getting Started
Example Case
Open Case
New Case
Organize
Analyze
Report
Recent Cases
Jumpstart Guide
CaseMap Jumpstart Wizard
Intake Interview Wizard
Learning CaseMap
CaseMap Quick Start Tutorial
What's New in CaseMap
'How To' Video Library
CaseMap Webinar Center
Training Options
White Paper Library
View sample CaseMap reports:
Key Facts
Summary Judgment Report
Case Summary ReportBook
TimeMap Timeline Visual
Refresh Example Case
☑ Show Additional Content

Example Case
Learn from the Hawkins v. Anstar example case.

Open Case
Open an existing case saved on your computer or local network.

New Case
Create a new case on your computer or local network.

You haven't opened any cases recently.

Reports for motions, briefs, staff, and clients:

Cover sheets make every report polished and professional.

Send reports directly to Microsoft® Word.

Create and email PDF reports.

Send facts to TimeMap for impressive timeline visuals.

From this pane, you can open an example case for practice, start creating a new case for your client, and gain access to CaseMap learning opportunities, including How-To videos.

If you have closed this interactive window, you can still open it from any other tab/pane by clicking the the File tab.

### ⊟ Learning CaseMap

1. Click the **File** tab to display the **Getting Started** pane.
2. In the **Getting Started Pane**, under the **Learning CaseMap** heading, select a training option (e.g., 'How To' Video Library) from the list.
3. On the **LexisNexis Tutorials** pane, select the recording to view.

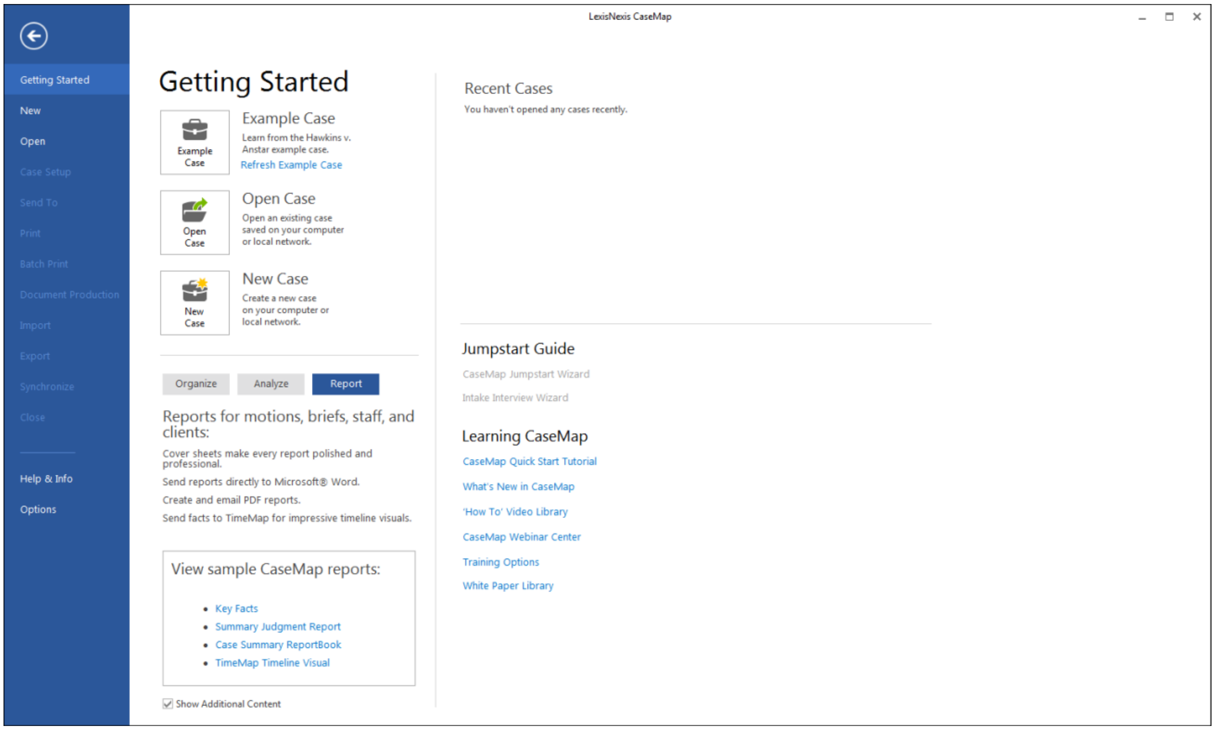
Related Topics

[About the Getting Started task pane]
[Practicing with sample data]

## About the Getting Started task pane

The Getting Started task pane displays in CaseMap when you open it or close a case. From this pane you can access recently-opened cases, older cases, create a new case, or refresh and/or open the Hawkins example case. You can access a variety of learning resources from here too. If you already have a case open and want to open the Getting Started pane, you can still access this pane.

The Getting Started pane opens by default when CaseMap is opened, but you can also click the File tab on the main ribbon to access it.


LexisNexis CaseMap
Getting Started
New
Open
Case Setup
Send To
Print
Batch Print
Document Production
Import
Export
Synchronize
Close
Help & Info
Options
Getting Started
Example Case
Example Case
Refresh Example Case
Open Case
Open Case
New Case
New Case
Organize
Analyze
Report
Recent Cases
Jumpstart Guide
CaseMap Jumpstart Wizard
Intake Interview Wizard
Learning CaseMap
CaseMap Quick Start Tutorial
What's New in CaseMap
'How To' Video Library
CaseMap Webinar Center
Training Options
White Paper Library

Learn from the Hawkins v. Anstar example case.

Open an existing case saved on your computer or local network.

Create a new case on your computer or local network.

Reports for motions, briefs, staff, and clients:

Cover sheets make every report polished and professional.

Send reports directly to Microsoft® Word.

Create and email PDF reports.

Send facts to TimeMap for impressive timeline visuals.

View sample CaseMap reports:

- Key Facts
- Summary Judgment Report
- Case Summary ReportBook
- TimeMap Timeline Visual

☑ Show Additional Content

You haven't opened any cases recently.

To close the Getting Started pane, click the File or another tab/button.

Related Topics

[Using the Getting Started tips]
[Practicing with sample data]
[Opening cases]

## Practicing with sample data

CaseMap provides you with a sample case, Hawkins v. Anstar, so you can practice using the application without using your own data. Hawkins v. Anstar is a fictitious case based on wrongful termination. When experimenting with the case, you can feel confident about clicking, adding, updating, and deleting data without ruining it. CaseMap has a Refresh Example Case link that instantly resets the example case so you can start practicing a new feature. To refresh the Hawkins case, close it by clicking the File tab and then clicking Close. Next click the Refresh Example Case link on the Getting Started task pane located on the left side of the screen. You can now re-open the example case and begin using it again.

Use the example case to practice adding new records to spreadsheets, inserting or creating custom fields, or to import documents into a case. Any changes you make to the example case are automatically saved so you can see how the software displays and updates data.

To access the Example case, ***c***lick the File tab to access the Getting Started pane, and then click the Example Case button to open the Hawkins v. Anstar sample case. In the Case Log On box, use the default user, Chris Attorney, and click OK to open the case.

Related Topics

About the Getting Started tips

## Printing the Quick Reference Card

The CaseMap Quick Reference Card is a four-page handout that you can use to help you with the basics of using CaseMap. If you are new to CaseMap or are on-boarding new staff, use the Quick Reference Card to get yourself and others familiar and comfortable with using CaseMap.

The CaseMap Quick Reference Card prints on 11 X 17 paper. You can choose to print it in color or black and white.

CaseMap Quick Reference Card

***The Quick Reference Card helps you do to the following:***

- 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

[About the Getting Started tips]
[About the Quick Start tutorial]

## Quick Start Tutorial

### *About the Quick Start tutorial*

If you have not yet signed up for CaseMap training, the CaseMap Quick Start tutorial will help get you grounded in using the software and working in a case.

***The CaseMap Quick Start tutorial is designed to help you:***

- Learn about CaseMap's primary features.
- Gain an introduction to the tools and features you need to use to create a case and start working in it.
- Practice with confidence using the Hawkins v. Anstar example case provided in CaseMap.
- Help you to find documentation on using CaseMap.

Related Topics

Introduction - Why CaseMap?
Lesson One - Organize
Lesson Two - Analyze
Lesson Three - Report

### *Introduction - Why CaseMap?*

CaseMap is a case organization, analysis, and reporting tool. The information in this tutorial is divided into three lessons: Organize, Analyze, and Report. This tutorial will take you through the basics of using CaseMap to work your cases.

⊟ **Why use CaseMap?**

As you get familiar with working in CaseMap, you will find many reasons for how it improves your case organization and daily tasks. The following list includes some of the top benefits that CaseMap provides.

***Using CaseMap, you will benefit by:***

- Having a solid framework and a proven method for organizing and evaluating the facts in any case.
- Gaining a thorough understanding of the dispute and clarify your thinking about it. As you sort out what you do know about the case, you will find it easy to identify what you don't know and what you need to find out.
- Drawing clear distinctions between facts and documents. Actions concerning a document can be facts (Hawkins wrote an email to Lang.) However, a frequent scenario is that a particular document contains numerous facts. Bottom line: facts and documents live in different places in CaseMap.
- Sharing CaseMap files with multiple members of a case team at the same time. Create a single case that is stored in a shared location on your network for all users to access.
- Working together with your entire case team to organize critical knowledge about the facts, the cast of characters, and the issues in your cases.
- Delegating and distributing organization, analysis, and reporting tasks so your team can divide and conquer any chaos in any matter.
- Investing the time to organize and share case knowledge in CaseMap, which pays big dividends when it is time to analyze, strategize, file motions or briefs, negotiate a settlement, or take the case to trial. Even if you haven't picked up the case for months, CaseMap keeps case knowledge, documents and your thinking about the case at your fingertips.
- Ensuring complete discovery, no matter what type of case you handle — civil or criminal.

## ⊟ Explore available learning resources

The CaseMap team provides you with many learning tools and resource options to meet your learning style and needs. See also Welcome.

- **CaseMap Training on the Go** — Learn about various CaseMap topics in the Webinar Center, available 24/7 at no charge. Click here to visit LexisNexis Training on the Go.
- **CaseMap Answer Center** — Click on the Help menu and then click Contents to launch CaseMap's online Answer Center, which provides the latest information and step-by-step procedures for the product version you are using. If you are working offline, you can click on User Guides to download or print content from the CaseMap Answer Center.
- **CaseMap Online Training** — CaseMap online classes are designed to give you the right amount of information and hands-on practice to prepare you to jump right into a working case or create your own once you have complete the course. Work with an CaseMap Certified Professional Instructor who has years of experience with the product and training legal professionals. Class size is kept small to meet the needs of each individual. And the cost is affordable to ensure you will take advantage the opportunity. To find out availability and which class best suits your needs, visit the LexisNexis University or visit our web site at http://www.lexisnexis.com/en-us/litigation/products/litigation-technology.page.

- **CaseMap Support** — CaseMap Support Representatives are available to get your through any difficulties you may be experiencing. Hours for support are Monday through Friday from 9:00 a.m. to 7:00 p.m. (EST). Please call at 800-543-6862 (Option 2, then Option 4) or email casemap.support@lexisnexis.com.

Related Topics

Welcome
Using the Getting Started tips
Practicing with sample data
User Guides

### *Lesson One - Organize*

Lesson one provides an overview of key terms used in CaseMap, some tips for using the product successfully, helps you create a case and start populating spreadsheets with data to organize your case knowledge.

#### ⊟ Learn the four basic terms

- **Spreadsheet** — The different working areas in of a CaseMap file that display in the main window pane. Access spreadsheets by clicking icons in the Favorites pane under Case Shortcuts. Spreadsheet views are the basis for creating reports in CaseMap.
- **Field** — The columns that display in spreadsheet view are known as fields. For example, the Date & Time field stores the date and time when each case fact occurred. A record is made up of fields. A spreadsheet record contains multiple field data.
- **Record** — The information in a case that describes a particular fact, object, issue, question, or research item. Records display in spreadsheet views as rows, running from left to right.
- **Cell** — A cell is where you type data or select a data value. A cell is where a field and record intersect in the spreadsheet.

#### ⊟ Learn four more important terms

- **Link** — A connection between two case elements, e.g., a connection between a fact and the issues on which that fact bears.
- **Search** — A way to explore your case information. CaseMap offers two primary search methods: filtering and tagging. Filtering limits the rows in your spreadsheet to those that meet criteria you set. Tagging marks the spreadsheet rows that meet your search criteria. Tagged records display with an icon to the left of each row.
- **Object** — In CaseMap, an "object" refers to the people, organizations, documents, and other things in your case. When you read "object," think "cast of characters".
- **Short Name** — Short Names are special names that you (or CaseMap) assign to each object and issue in your case. Short Names help you make links between various types

of case information.

## Use these spreadsheets to get started

When you first create a case, you will want to enter data in the following three spreadsheets and learn how to use the basic tools and feature for each.

- **Objects** — Use the Objects spreadsheets to create and organize the cast of characters. The characters are the people, documents, organizations, and other things that are important to know about in the case.
- **Issues** — Use the Issues spreadsheet to organize and explore an outline of claims and arguments.
- **Facts** — Use the Facts spreadsheet to lay out the chronology of case facts.

## View three tips for using CaseMap successfully

The following three tips are essential for using CaseMap successfully.

- **Start a new case when you take a new case**

  The best way to get the most out of CaseMap is to put it to use during the first days of a case. Start a new case when you have the first conversation with a prospective client. Long before the first box of case documents arrives, you can use CaseMap to organize early case knowledge and to plan discovery.

- **Always use short names**

  Short Names are special, unique identifiers that are assigned to each person, place, or thing in your case. Short names also link your data in CaseMap spreadsheets so you can search and view information faster and create meaningful reports. Don't worry about creating short names, CaseMap will do it for you. See About short names.

- **Right-click a lot**

  The two most important locations that you can right-click within CaseMap are field (column) headers and within cells. Each field header displays a Tool Tip with hints that provide quick information on what to do in a field. Simply place your mouse pointer over a field header (title) to display the Tool Tip.

## Create a test case

Open CaseMap and click Start a new case on the Getting Started with CaseMap pane. The New Case Wizard will guide you through the steps of creating a new, empty case for you.

***When you create a new case, CaseMap helps you by:***

- Automatically generating a set of default fields for each spreadsheet. You do not have to use all of these fields (columns), but they are available for use if needed. The default fields provided by CaseMap should handle most of your data entry needs. It is also possible to create custom fields as needed. See also About spreadsheets and About spreadsheet fields.
- Launching the Case Jumpstart Wizard when you complete the New Case Wizard. Once your new case is created you can start building your cast of characters and entering information right away. The wizard provides different pages for you to enter the various

types of people involved in your case. In the wizard, click the categories on the left or use the Next and Back buttons on the bottom of the page to navigate the categories. See also Case Jumpstart Wizard.

- Automatically populating the appropriate spreadsheet in your new case. You can now add details for the people, documents, organizations, etc., using the individual object type spreadsheets. You can find shortcuts to all the spreadsheets in your CaseMap file by clicking All Shortcuts in the Navigation pane. See also About objects.
- Providing an interactive, three-step work flow learning tool that offers CaseMap best practices and tips for how to organize a case. Place your mouse pointer over each work flow step (Organize, Analyze, and Report) to view each set of tips. Click on a link to view additional details. See also Using the Getting Started Tips.

## Use short names to link data

Short names are unique names created by CaseMap for each object entered in a case and are what make linking case data possible. CaseMap automatically creates short names from the Full Name field entry. When you type using short names, CaseMap automatically identifies text that already has a short name created for it and links the object short name with case information (documents, facts, questions, research, and issues). When using short names, CaseMap automatically does a significant amount of the linking for you.

You can create your own object short names or modify CaseMap's default short name as needed. Fields that store short names and link to other case information are Description fields, identified by the chain link icon 🔗 in the field header.

Using short names is not required; you can enter data without using short names. However, not using short names limits the power of CaseMap's primary feature: linking and connecting case knowledge elements between spreadsheets. This feature is what allows you to search and view data in various ways at a moment's notice so you can locate essential information and create reports that shape and support your case strategy.

For more information, see About short names.

## Enter data with ease

You have created your new case; now you are ready to enter information about the case into spreadsheets to organize case knowledge. To enter data, simply type information directly into the cells of each spreadsheet record. To add a new record, press the Insert key or click File > New.

Information is automatically saved as you navigate to a new cell / field / spreadsheet. If you need to undo your last edit, press the ESC key *before* leaving the cell.

For more information, see About entering data, Entering Objects, and Entering Facts.

## Learn about dates and times

CaseMap's date fields accommodate common dates (mm/dd/yyyy by default). You also have the option of using the Fuzzy Dates and the Date Stamper tool.

### Fuzzy Dates

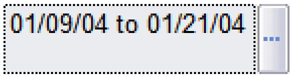
A fuzzy date is a partial date entry. You may need to enter a fuzzy date when you know the month and year, but not the day. Or perhaps you only know the year. CaseMap allows you to enter question marks in place of the missing date.

In CaseMap, typing 99 in the Date & Time field will display as ??/??/1999. Likewise, typing 8/99 is also valid. CaseMap displays it as 08/??/1999 and sorts it as August 1, 1999.

You can also enter date ranges in date fields. Date ranges are sorted based on the first date entered. An example of a valid date range is: 7/1/08 to 7/4/08. You can also use a hyphen to define the date range: 7/1/08 - 7/4/08.

### Date Stamper

The Date Stamper tool is used to assist with date and time entries by setting the date and time, or editing it if already displaying within a field. Using this tool is optional, but it is helpful for setting time zone abbreviations when cases include facts occurring in various parts of the country or internationally. When you click in a Date & Time field a button display to the right of the cell, which launches the Date Stamper.



01/09/04 to 01/21/04

You can also enter times in CaseMap's date fields. You have the option to display the times in 12-hour or 24-hour time. Along with the fuzzy dates, you can enter fuzzy times such as 4:??. Your date ranges can also include times.

To choose how your dates display, e.g., whether the day of the week displays 24-hour time, or to change the date format (mm/dd/yyyy), select Options on the Tools menu, and click on the Date tab.

For more information, see Setting the date and time for facts.

## Change your spreadsheet view

You can change how the data is displayed on your screen, which is very important for two reasons:

- Changing the spreadsheet view helps you organize your thinking while you are viewing the data on screen.
- Since reports are what- you-see-is-what you-get (WYSIWYG), modifying the spreadsheet gives you control over the appearance of reports.

### To hide a field

Right-click on its field header (title) and select Hide Field on the menu.

When you hide a field, you're not losing any of the data, you're just temporarily removing it from view.

### To insert a field or fields

1. Right-click any field header and select Insert Field(s) on the menu. A list of available fields will be displayed.
2. Then check the box(es) next to the fields you want to add to your spreadsheet and click OK.

### To move a field to a new position

Left -click on the field header, hold your mouse button down and drag it.

Release your mouse button to drop the field in a location in the spreadsheet.

For more information, see Changing spreadsheet elements, Creating spreadsheet views, Inserting/hiding fields, and Moving fields.

## ⊟ Learn about the Object spreadsheets

CaseMap's Objects spreadsheets are where you organize lists of the persons, organizations, documents, and other things your case is about. Use Objects spreadsheets to produce Document Indexes, Exhibit Lists, Witness Lists, and Cast of Characters reports.

Use the Case Shortcuts pane to determine which Object spreadsheets you view. Favorites include All Objects, Persons, Organizations, and Documents. Display all Object spreadsheets by clicking the All Shortcuts bar in the Case Shortcuts pane.

### ⊟ All Objects vs. Object sub-spreadsheets

- **All Objects spreadsheet**

  When your view is set to All Objects, the spreadsheet displays a mixture of persons, organizations, documents and other objects. The fields in the All Objects spreadsheet are common to all object types.

- **Objects sub-spreadsheets**

  When your view is set to a specific type of object, like Documents, the spreadsheet displays only items/objects of that specific type.

  When your Object spreadsheet is set to display only one type of object, it will include fields that are specific to that object type. For example, when your view is set to Documents, the spreadsheet will include the default fields CaseMap creates for documents, e.g., Bates-Begin and Bates-End.

### ⊟ Adding objects on the fly

CaseMap's Add Objects On the Fly feature makes it easy to pop new objects into the case as you enter facts and other descriptive information.

If you are entering facts and need to refer to a person or organization that has not been entered into the case as an object (and so has no short name), you can easily do this on the fly. And you do not have to change to an Objects spreadsheet either. You can do it from the Facts spreadsheet in any description cell, like Fact Text. To try this, see Entering Objects.

For more information, see About Objects and Entering Objects.

## ⊟ Learn about the Facts spreadsheet

The easiest way to add facts to the Facts spreadsheet is to cull them from documents. Over 30 litigation support programs have integrated with CaseMap, incorporating a Send to CaseMap feature.

### ⊟ To add facts from PDFs

The most common format for electronic documents is PDF. CaseMap's DocPreviewer add-in program enables setting up documents as objects and culling linked facts from them. To learn more, see About PDFs and DocPreviewer.

You can also try this yourself using the Hawkins v. Anstar example case in CaseMap. Follow the steps in the Sending Facts from PDFs topic. Using the Send to CaseMap tool, the PDF file will automatically become an object in CaseMap with a short name. And the file will be included in the Documents spreadsheet. Selected text in the PDF file will automatically display in the Fact Text field in the Facts spreadsheet.

You can also use DocPreviewer's Send to CaseMap feature while in Review Mode and you are viewing documents already linked into your CaseMap case. The DocPreviewer PDF Review Wizard will guide you through reviewing linked PDFs and the steps to add a new fact to the Facts spreadsheet while doing so. Follow the steps in the Reviewing PDFs topic.

### To manually add a new fact

You can add new facts directly in the Facts spreadsheet by clicking the New Record button (upper left corner) and then clicking Fact.  Or you can press the Insert key to add a new fact. All new fact records are added at the bottom of the Facts spreadsheet. In the Fact Text field, type in the new fact information.

To re-sort facts to chronological order by date, click Refresh Spreadsheet on the More menu of the Home ribbon, or use the keyboard shortcut F5. Fact records with a date of To Be Determined (TBD) sort to the bottom of the spreadsheet until a date is entered.

For more information, About facts and Entering facts.

## Understand about linking

CaseMap links data in two manners: linking data together between spreadsheets using short names or linking (attaching) a source file in a network directory folder to spreadsheet record.

CaseMap makes it easy to establish internal relationships among the different types of information you capture in a case. For example, you can link a fact to the persons and organizations the fact is about, to the documents or depositions from which it is sourced, and to the issues on which it bears.

Once you make links, you can use them to explore and analyze your case. For example, as you view the Issues spreadsheet, you can display a list of the facts linked to any issue with just two mouse clicks on a # field.

CaseMap makes linking as easy as possible. Most linking is accomplished for you automatically as you enter case data using short names.

### Linking data internally using short names

Any field that has a chain link icon 🔗 recognizes short names and you will benefit greatly by using short names whenever appropriate in these description fields.

For more information, see About short names.

### Using the Issue Linking tool

The most common linking task is linking case issues to facts, people, documents, other things, questions, and research using the Issue Linking Tool.

In CaseMap, it is useful to extract lists of facts linked to various issues in the case. The same is true for documents that have been laboriously issue-coded. The easy way to do issue linking on any spreadsheet in CaseMap (except the Issues spreadsheet where you define the issues) is by using the Issue Linking Tool.

The Issue Linking pane allows you to apply issues records while working in a spreadsheet. To open the Linking Issues pane, click the Issue Linking button on the toolbar. From the Issue Linking pane, you can also add a new issue that will automatically be added to the Issues spreadsheet. To try this, see Analyzing and linking documents topic and follow the steps To link document records to case issues.

#### Linking data to external files

A primary feature of CaseMap is that you can link relevant documents to the Documents spreadsheets and Facts spreadsheet using the Send to CaseMap feature (part of CaseMap's DocPreviewer add-in program). The Send to CaseMap feature is integrated me in 30+ litigation support programs, like Adobe® Acrobat® and Reader®, and LexisNexis Concordance®.

To learn more, see About PDFs and DocPreviewer, About the Send to CaseMap tool, Sending facts from PDFs, Sending facts from Concordance.

### Define case issues

When you accept a case, start outlining your issues in the Issues spreadsheet so you can quickly develop a hierarchy of claims, counterclaims, and any other known arguments. The Issues spreadsheet can hold as many levels or sub-issues as you want.

To try this, see the About Issues and Creating outlines topics.

Related Topics

About the Quick Start tutorial
Introduction - Why CaseMap?
Lesson Two - Analyze
Lesson Three - Report

## *Lesson Two - Analyze*

Analyzing case data tells you what you know and can point the way to important information that you need to know. Looking at case information from various angles may offer insights not otherwise available. Follow Lesson Two and you will have the tools you need to sort a spreadsheet, search for data of interest, make issue links, and explore the # fields to see the relationships among persons, facts, documents, and other case knowledge.

Searching case data and viewing links can stimulate your thinking and can reveal patterns that may be useful in achieving the best results for your clients.

## ⊟ Sorting a spreadsheet

Sorting determines how spreadsheet rows are visually displayed. For example, when you create a new case the Facts spreadsheet defaults to a Date & Time sort with facts listed in chronological order.

To sort the fields in your spreadsheet, right-click on the field header (title), and then click Sort Ascending or Sort Descending. Please note that some fields in CaseMap, like the 10,000-character description fields, cannot be sorted.

If necessary, you can use multiple fields to sort your spreadsheet view. For example, you can sort the Questions spreadsheet first by the persons to whom questions are assigned and then by the date an answer is due. You must use the Advanced Sort dialog box to create a multi-column sort. Open it by selecting Advanced Sort on the Editing menu on the Home ribbon.

For more information, see About sorting, Changing the field sort order, and Sorting multiple fields.

## ⊟ Filtering spreadsheets

Filtering allows you to choose which records are in view on a spreadsheet. For example, you can filter the Facts spreadsheet so only undisputed facts display. You can use the Instant Filter feature to run most filters. Or use Guided Filter on the Records > Filter menu. CaseMap includes a number of useful searches for every spreadsheet on the menu and on the My Saved Searches fly-out menu. To learn more, see About Filtering.

When you run a filter, a Search Results bar displays above the spreadsheet identifying what filter(s) are currently being using to display case records. The Search Results bar also has Cancel Search and Save buttons. Clicking Save opens a dialog for naming the search. After naming it and clicking OK, the saved search is accessible by clicking the Search button and then clicking My Saved Searches.

***CaseMap offers the following search tools:***

- **Instant Filter** — Use for simple filters, like a key word, such as filtering the Facts spreadsheet to only display undisputed fact records. Simply right-click on any field data and click Filter by Selection. To practice, see Performing basic filters.
- **Guided Filter** — Use the Editing menu options to run pre-built filters provided by CaseMap or access your own saved filters. To practice, see Performing guided filters.

  The filters you find on the Editing menu on the Home ribbon are similar for each spreadsheet. For example, on the Editing menu for Facts you can search for facts linked to people or documents, linked to issues, containing text, or added in the last day, week, month, or quarter.

  Filters saved to the My Saved Filters menu provide specific searches that are relevant to facts. Any searches you run and save are added to the My Saved Filters menu. Running a saved filter will cancel any filters that are in place before executing the saved filter.
- **Advanced Filter** — Use the Advanced Filter pane to construct and save multi-level filters using search operators to narrow results as well as edit and save complex filters. To practice, see Performing advanced filters.

## ⊟ Searching spreadsheets

CaseMap allows you to quickly search case data because it automatically creates a comprehensive index during the import process. You can search and locate all instances or "hits" of your search terms in spreadsheet records, linked files, and annotation notes.

Search terms can be more than one word. They can also be numbers, text phrases, or a combined use of terms and search operators. A search term is typed into the Search field with results displaying in the Search Results navigation pane and in the Search Results spreadsheet pane.

You can click on each spreadsheet listed in the Results pane of the Search Results navigation pane to view only those records and linked files that contain your search terms. Search hits found in linked files can be viewed in CaseMap's DocManager file viewer. Search hits found in annotation notes can be previewed in the Search Results spreadsheets pane and viewed in full in DocManager. For more information, see Viewing search results.

***There are two levels of searching in CaseMap:***

- **Basic Searching** — performing keyword (one word) searches and locating all instances of the term in spreadsheet fields, linked files, and annotation notes.

  For more information, see Running basic searches.
- **Advanced Full-Text Searching** — performing searches with two or more search terms or phrases that gain stronger, precise search results.

  Advanced searches can be run in the Full Text Search dialog box, which also allows you to restrict the spreadsheets you want to include in the search.

  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

# fields all begin with a number or hash mark symbol. These fields count the relationships between different types of case elements in a case and display the resulting count (67 facts linked to Fraud issue). # fields also help you explore the connections between facts and issues, between objects and issues, and between facts and objects. When you use short names, CaseMap automatically updates entries in many of the # fields.

To see or print a list of the items you've linked that CaseMap has counted, double-click the number in a cell. A List dialog box displaying associated records. You can also print or export this list for reference.

To learn more about # fields, see About spreadsheet fields and click the # fields count links between case elements drop-down.

### Compiling research

CaseMap has three spreadsheets for you to use in compiling and analyzing research:

- **Authorities** — Track and organize your authorities by type and jurisdiction, and link the research directly to issues to support your case strategy.
- **Extracts from Authorities** — Track and organize extracts by entering summary descriptions and notes needed to track its relevance to the case.
- **Authorities and Extracts** — A split-screen view of both spreadsheets where you can view an authority and its associated extracts.

Start with the Authorities spreadsheet to list case law, statutes, regulations, rulings, and articles that you want to reference. Then extract passages that you want to track and copy them to the Extracts from Authorities spreadsheet.

To learn more, see About research, Entering research, and Analyzing and linking research.

### ⊟ Sending online research from LexisNexis

If you are using LexisNexis research content as part of your workflow solutions portfolio, you can import authorities from your Internet Explorer web browser with a Send to CaseMap feature. To learn more, see About online research.

When you have a passage in a case you have located at www.lexis.com that you want to add to your open CaseMap case, highlight in your Internet Explorer browser, then right-click the selected area and click Send to CaseMap.

During the import process, the selected text will be added to Extracts spreadsheet and the source document will be added as a new record on the Authorities spreadsheet. To try this, see Using online research tools.

Related Topics

- About the Quick Start tutorial
- Introduction - Why CaseMap?
- Lesson One - Organize
- Lesson Three - Report

## *Lesson Three - Report*

With CaseMap, you can create instant professional work product with a few mouse clicks and output to paper, PDFs, or Microsoft® Word. Your case analysis reports will become the raw materials that make it far easier to generate documents required by the court. For example, your Fact Chronology will make it easy to create Motions for Summary Judgment and to produce the list of facts to you are willing to stipulate and are needed for many pre-trial motions.

CaseMap reports use the What-You-See-is-What-You-Get (WYSIWYG) principle, so what is displayed in your spreadsheet view is the same as what you see in your report. Click More > Print Preview button on the Reports ribbon to see a preview of your report. A title page is automatically created for you when you print or preview the report. You can customize the title page by clicking ⋯More > Page Setup on the Reports ribbon.

### ⊟ Change the spreadsheet to modify the report

If you want to adjust the look of report, all you need to do is change your spreadsheet view by re-arranging, inserting, or hiding fields.

#### ⊟ To hide a field

Right-click on its field header (title) and select Hide Field on the menu.

When you hide a field, you're not losing any of the data, you're just temporarily removing it from view.

### To insert a field or fields

1. Right-click any field header and select Insert Field(s) on the menu. A list of available fields will be displayed.
2. Then check the box(es) next to the fields you want to add to your spreadsheet and click OK.

### To move a field to a new position

Left -click on the field header, hold your mouse button down and drag it.

Release your mouse button to drop the field in a location in the spreadsheet.

For more information, see Changing spreadsheet elements, Creating spreadsheet views, Inserting/hiding fields, and Moving fields.

## Choose from a variety of print output options

CaseMap allows you choose from a variety of output options when you print a report.

Use the Reports ribbon to print reports or ReportBooks. A ReportBook is a compilation of saved case analysis reports (spreadsheets) that includes a title page, confidentiality statement, table of contents, introduction, and report title pages. The Reports ribbon lists all reports and ReportBook options.

***You can print reports and ReportBooks to the following:***

- Network printer
- Print Preview
- PDF files (which you can save or email)
- LexisNexis TimeMap*
- Microsoft® Word* or Corel® WordPerfect*
- HTML
- Microsoft® Excel*

Reports marked with an asterisk must be installed on your machine in order to print reports to these applications. Word, WordPerfect, and HTML reports can be viewed in Grid View (fields horizontal) or Record View (fields vertical).

To print reports and ReportBooks, see About printing reports and Printing pre-built ReportBooks.

## Learn more about reports and ReportBooks

A ReportBook is a compilation of saved case analysis reports (spreadsheets) that includes a title page, confidentiality statement, table of contents, introduction, and report title pages. You can print and manage ReportBooks from the Reports ribbon. You can create custom ReportBooks by changing the text and graphics (by clicking the Manage ReportBooks menu option). ReportBooks can be printed, previewed, or converted to PDF file to save or email.

CaseMap also provides standard reports that you can print with the help of a wizard. Standard reports that you can print directly from the Reports ribbon include:

- **Privilege Log Wizard** — facilitates production of a report listing documents you've marked as privileged under attorney-client, attorney work product, or any privilege type you determine.
- **By Issue Report Wizard** — allows you to create a comprehensive report of all the records on any spreadsheet (except Issues) linked to a selected issue or set of issues. You can output the report to Word, WordPerfect, or HTML.
- **By Object Report Wizard** — allows you to create a report of grouped objects, for example: facts grouped by document, facts grouped by person, documents grouped by person, and more.
- **Summary Judgment Wizard** — allows you to prepare Motions for Summary Judgment, Statements of Disputed Material Facts, and Memoranda In Opposition court filings.

To create reports and Reports, see About creating reports and About ReportBooks.

Related Topics

About the Quick Start tutorial
Introduction - Why CaseMap?
Lesson One - Organize
Lesson Two - Analyze

## Opening cases

Case files are databases created to store all the data related the case. Some cases are created and saved locally on your organization's network. Other cases are created and stored for remote user access across your organization's Wide Area Network (WAN). For example, cases stored on a WAN can be accessed by CaseMap users across the nation or even in another country. Depending on how the case is created and where it is saved determines how you will open it in CaseMap. Cases that are located on the WAN may take longer to open than those saved locally.

***Methods of opening a case:***

- **Getting Started pane > Open Case** — Launches cases saved locally on the network and written to a Microsoft® Access database. These case are saved in network folders where other case data is stored and organized.
- **File Tab > Open > Recent Cases** — Launches cases saved locally on the network and written to a Microsoft® Access database. These case are saved in network folders where

other case data is stored and organized.

- **File > Open > SQL Case** — Launches SQL cases stored on the Wide Area Network (WAN) and written to a SQL database. These cases are saved in CaseMap Server, which is a dedicated database server designed to store CaseMap cases.

  If you do not have CaseMap Server, you will not see this option on the menu.

If you are working in multiple cases, you will need to know which option to use for each case you want to open. If you are opening SQL cases, your system or database administrator will need to provide you with the network server name and which authentication option to use when opening the case.

CaseMap allows you to open one case at a time within an active application window. If you want to work in other cases simultaneously, you'll need to launch additional CaseMap windows to access them. Case names display in your Windows title and status bars so you can differentiate them while working.

If you cannot open a case, contact your system administrator and tell them the case name you need to open. They can ensure that you have proper access to the network location where the case is stored.

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 recent case

1. Click the **File** tab, and then select a case from the **Recent Cases** list.

   You can also click the Open Case button on the Getting Started pane.

   On the **Open** page, click **Recent Cases** and then select the case to be opened from the **Recent Cases** list.

2. 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.

   ⚠ Do not select the Open Exclusive option in the Case Logon Options dialog box unless you are performing administrative tasks. Doing so locks out all other users until the case is closed and re-opened with regular user permissions.

3. Type in your password, then click **OK**.

   If this is the first time you are opening this case, you will need to re-enter your password to confirm the entry.

   The case now displays in CaseMap with all current data.

Also notice that the name of the case displays in the center of the CaseMap title bar.

If the Case Jumpstart Wizard opens, click Cancel or clear the Show when opening a new case check box if you do not want it to launch each time you open a case.

### To open a SQL case

1. Click the **File** tab, and then click **Open Case** button on the Getting Started pane.

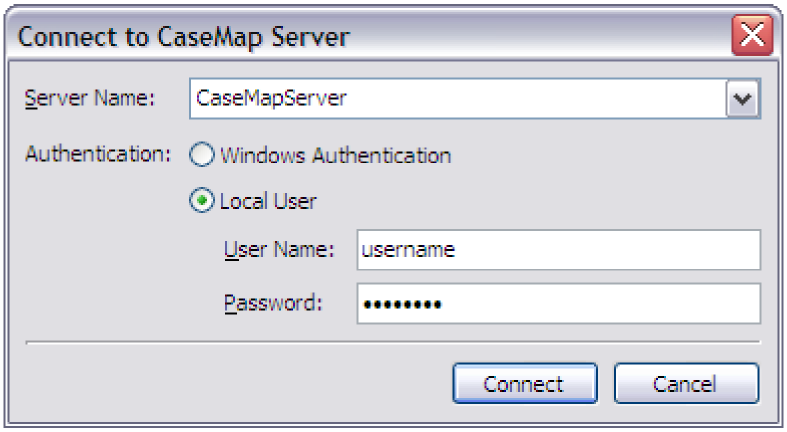
   If you do not have CaseMap Server, you will not see this option on the File tab.

   You can also press CTRL + O to open a SQL case.

2. On the **Open** page, click **SQL Case** and then select the case to be opened.

3. In the **Connect to CaseMap Server** dialog box, type in the server name in the **Server Name** field.

   Your case database administrator will need provide you with the server name and tell you which authentication method to use.



Connect to CaseMap Server

Server Name: CaseMapServer

Authentication: ○ Windows Authentication ● Local User

User Name: username

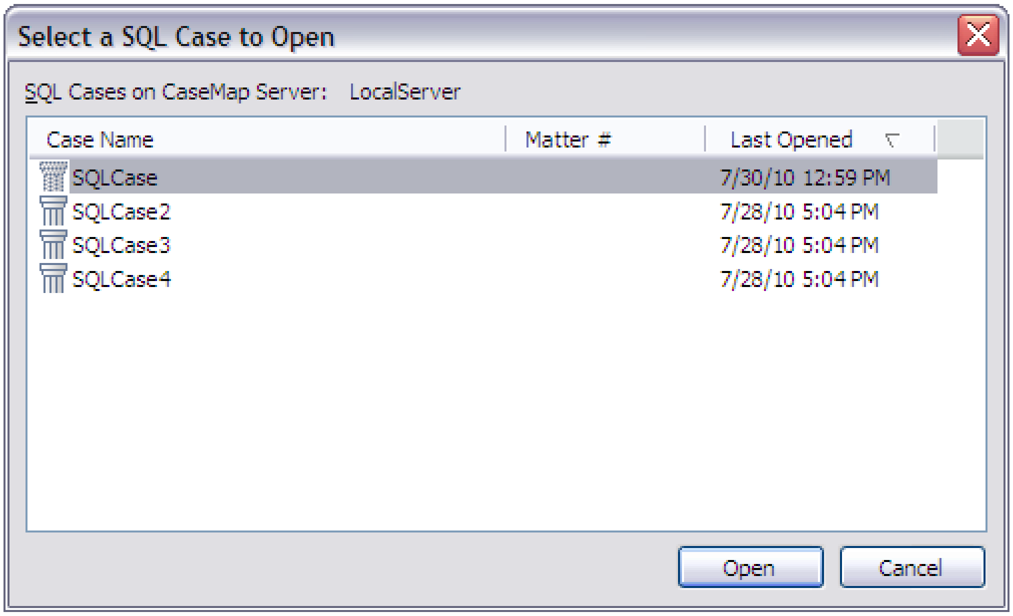
Password: •••••••••

4. Select the authentication you need to use: **Windows Authentication** or **Local User**.

   If you select Local User, type in your user name and password.

5. Click **Connect** to continue.

6. In the **Select a case to open** dialog box, select the case you want to open, then click **Open**.


Select a SQL Case to Open
SQL Cases on CaseMap Server: LocalServer
Case Name
Matter #
Last Opened
Open
Cancel

| Case Name | Matter # | Last Opened |
|---|---|---|
| SQLCase | | 7/30/10 12:59 PM |
| SQLCase2 | | 7/28/10 5:04 PM |
| SQLCase3 | | 7/28/10 5:04 PM |
| SQLCase4 | | 7/28/10 5:04 PM |

The case now displays in CaseMap with all current data.

If the Case Jumpstart Wizard opens, click Cancel or clear the Show when opening a new case check box if you do not want it to launch each time you open a case.

### To close a case

1. Click the **File** tab to display the Getting Started page.
2. Click **Close** to close the case and display the Getting Started page.

Related Topics

About the Getting Started task pane
Changing passwords
Before creating cases
About cases
Creating cases

## Changing passwords

Local case passwords can be set for additional security and are distinct to each case.

When you first open a local case assigned to you, your password automatically defaults to blank (no characters). Passwords can be left as blank or be up to 10 characters long.

Passwords are not case sensitive.

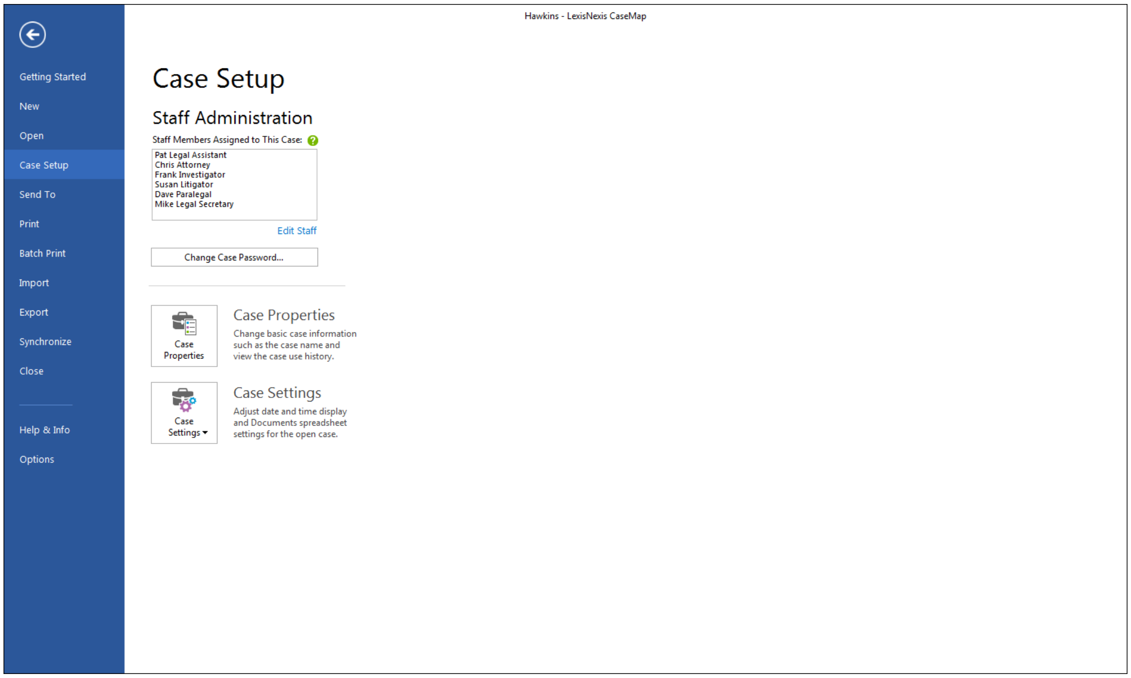
We recommend that you and all users set passwords and change them on a regular basis to ensure that user history and tracking is distinct to each logon. If you've forgotten a password, contact CaseMap Support to have it reset.

If you are opening SQL case for the first time, you must type the password provided by your system administrator. You can change your SQL case password after your first log in.

If you have CaseMap installed on your machine, you can open the example case, Hawkins v. Anstar, without a logon and start experimenting with CaseMap in conjunction with the Quick Start tutorial.

## To change a password

1. Click the **File** tab, and then click **Case Setup**.


Hawkins - LexisNexis CaseMap
Getting Started
New
Open
Case Setup
Send To
Print
Batch Print
Import
Export
Synchronize
Close
Help & Info
Options
Case Setup
Staff Administration
Staff Members Assigned to This Case:
Edit Staff
Change Case Password...
Case Properties
Case Settings

Pat Legal Assistant
Chris Attorney
Frank Investigator
Susan Litigator
Dave Paralegal
Mike Legal Secretary

Case Properties: Change basic case information such as the case name and view the case use history.

Case Settings: Adjust date and time display and Documents spreadsheet settings for the open case.

2. Click the **Change Case Password** button.

The Change Case Password button is disabled if you logged into CaseMap Server via Active Directory, or if you do not have permission to change your password.

3. In the **Change Case Password** dialog box, type your current password in the **Old Password** field.
4. In the **New Password** field, type in the new password.
5. In the **Confirm Password** field, retype the new password.

6. Click **OK** to save the change.

Related Topics

Opening cases
Adding users to cases

# *Working with 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 data in preparation for depositions and trial. Each case contains spreadsheets that are distinct to the various information types you choose to track and analyze information. You can create as many cases as needed for the various cases your organization is working on. Each case is saved on your network in folders and can be opened in CaseMap on your desktop.

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 have access to the network folder where the case is stored.

⚠ Do not select the Open Exclusive option in the Case Logon Options dialog box unless you are performing administrative tasks. Doing so locks out all other users until the case is closed and re-opened with regular user permissions.

For more information on how to create SQL cases and add users to SQL cases, refer to your CaseMap Server documentation.

### **Identify local cases by the column icon**

Local cases are identified by the column icon when they are stored in network folders. The case file name is the name of the case database file.

Plaintiff_vs_Defendant.cm8

### **Create local cases based on templates**

Cases may be created manually by supplementing with pre-built templates or by copying a previous case into CaseMap and then customizing it for a particular new case.

For more information, see Case templates.

### **Use passwords to protect local case integrity**

New local cases are not protected by passwords until you or other users create them. 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 users 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.

> User passwords for SQL cases are required and are set for each user in the CaseMap Admin Console by the system administrator. Users may change SQL case passwords in TextMap in the same way they do for local files.

For more information, see Changing passwords

### ⊟ Work in multiple cases simultaneously

CaseMap allows you to open one case at a time per active application window. If you need to access more than one case simultaneously, you can launch additional CaseMap windows to open them. Case names display in the CaseMap title and status bars so you can differentiate between them while working.

**Related Topics**

- Before creating cases
- Opening a case
- Creating cases

## Before creating cases

Cases are actually databases designed to help you organize and analyze data in preparation for depositions and trial. Cases may be created manually by supplementing with pre-built templates, or copying a previous case into CaseMap and then customizing it for a particular case.

Planning your case before you start creating it in CaseMap helps you get the most productivity from CaseMap with the least effort. You can also avoid false starts with a small amount of pre-planning.

### ⊟ Case Creation Checklist

Use the following Case Creation Checklist to assist in planning your case.

## Checklist: Creating Cases

| | Task |
|---|---|
| ☐ | Are you starting new cases in CaseMap? This is a best practice for all cases, small and large.<br>* If you are approaching a trial date, importing large amounts of data from existing cases into CaseMap is not recommended. Existing case data requires editing and mapping to prepare the data for an import into CaseMap. |
| ☐ | Do you have a CaseMap cases folder created on the network for local cases? Is security applied to this folder and reserved to only case users? |
| ☐ | Do you have SQL cases created and registered in the CaseMap Admin Console for cases that are available on the WAN? Did you assign the case to users in the CaseMap Admin Console?<br>* This only applies to organizations who have CaseMap Server installed. |
| ☐ | Have you identified the primary time zone where case events occur? |
| ☐ | Do you have multiple time zones for case events? |
| ☐ | Have you determined the additional date and time modes and settings used for this case?<br>* Date and time settings affect how data is read and imported from other sources like the Intake Interview Jumpstart form, delimited text files, etc. It also affects how manual data entry of dates should be done. |
| ☐ | Did you remember to fill in case properties information in File > Properties, so you can track the court case number opposing counsel, assigned judge, and enter a case description? |
| ☐ | Did you evaluate the spreadsheet field types needed to hold specific case information? |
| ☐ | Do you have field naming conventions set in place? |
| ☐ | Are there any custom fields that need to be created for spreadsheets and reports?<br>* CaseMap's default set of fields should accommodate most of your data entry needs. |
| ☐ | Do you know the names, types, and properties for any custom fields you have planned? |
| ☐ | Do you need to apply field security to restrict users from entering data or changing the status of a field? |
| ☐ | Do you have a listing of all case staff that need to be added to the case? |
| ☐ | Did you make all users Authors (instead of Scribes), so you can track user history based on user logons? |

**Checklist: Creating Cases**

| | Task |
|---|---|
| | * CaseMap tracks Scribe user history in the Creation Scribe and Last Update Scribe fields. Insert the Last Update Author and Last Update Scribe fields to track individuals. |
| ☐ | Have you determined short name conventions for all people and organizations associated with the case, particularly for duplicate or unusual names? |
| ☐ | Do you plan to use the Case Jumpstart Wizard to enter a Cast of Characters? |
| ☐ | Have you assigned a case staff member the task of creating an issue outline? |
| ☐ | Have you discussed with case staff the protocol for entering case data? |

## Case name requirements and considerations

Note the following requirements and considerations for naming cases:

**Requirements**

- Case names may contain: letters, numbers, spaces, commas, and periods.
- Case names many not contain: colons, quotations marks, slashes, or asterisks.

**Considerations**

- When determining the name for a case, it is a good idea to check whether your firm already has a naming convention in place. Many firms name files by case name or matter.
- The case name may be visible to clients and other parties outside your firm as it prints on all reports.
- The case name may be visible to other users and system administrators as it appears in the file name and in the title bar within CaseMap.

## Store cases in network folders for staff access

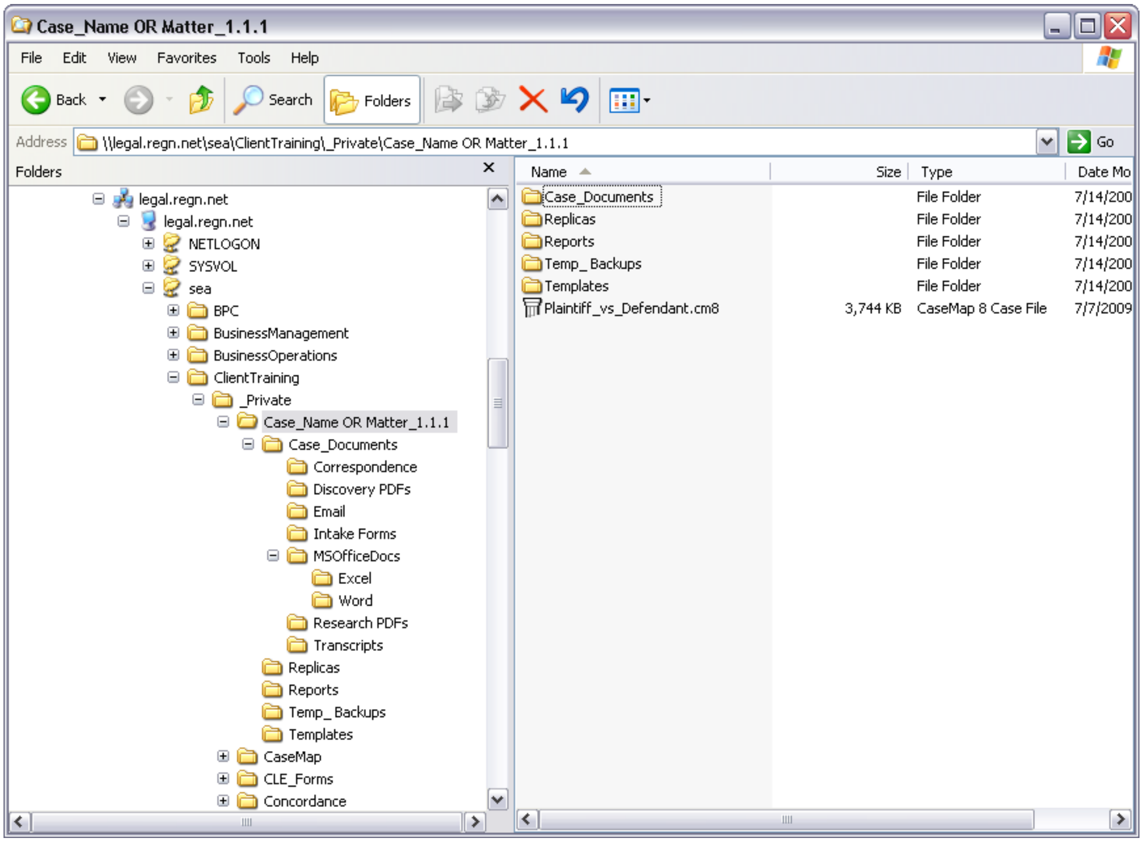
Cases should be stored on the network where all case users can access the file. The case should be stored by case name or matter, or according to your organization's internal guidelines.

If there is no network setup or only one individual is using a case, the case can be stored on a user's hard drive. In this instance, nightly backups of the case should be made to a flash drive or portable hard drive. In this scenario, other users cannot access the case without using a replica copy. Synchronizing data with the primary case should then occur regularly.

### Use folder naming conventions

Most organizations have network directory design guidelines already in place for storing information in a consistent manner. We recommend that you consider our example while you review your own.

The following example reflects folder naming conventions and directory hierarchy for storing cases, documents, replica cases, backup files, etc.


Case_Name OR Matter_1.1.1
File
Edit
View
Favorites
Tools
Help
Back
Search
Folders
Address
Go
Folders
legal.regn.net
legal.regn.net
NETLOGON
SYSVOL
sea
BPC
BusinessManagement
BusinessOperations
ClientTraining
_Private
Case_Name OR Matter_1.1.1
Case_Documents
Correspondence
Discovery PDFs
Email
Intake Forms
MSOfficeDocs
Excel
Word
Research PDFs
Transcripts
Replicas
Reports
Temp_Backups
Templates
CaseMap
CLE_Forms
Concordance

Address: \\legal.regn.net\sea\ClientTraining_Private\Case_Name OR Matter_1.1.1

| Name | Size | Type | Date Mo |
|---|---|---|---|
| Case_Documents | | File Folder | 7/14/200 |
| Replicas | | File Folder | 7/14/200 |
| Reports | | File Folder | 7/14/200 |
| Temp_Backups | | File Folder | 7/14/200 |
| Templates | | File Folder | 7/14/200 |
| Plaintiff_vs_Defendant.cm8 | 3,744 KB | CaseMap 8 Case File | 7/7/2009 |

If you are planning to move a case to a new directory location, and want to ensure that the database is still accessible to users, build a directory template structure that is easy to relocate.

### Apply security to cases to control access

Case security is applied by controlling access to cases stored in folders on your network. Apply folder security for only those case users working on a particular case. In this manner, you are preserving case integrity by preventing others from reviewing your case information and strategy.

### Set the date/time zone for case accuracy

When you create a new case, it's important to identify the time zone. Select this value based on where the case facts occurred. This may not necessarily be where your firm is located. Once you set the time for a case, you cannot reset it later.

### Use the Case Jumpstart Wizard to quickly populate new cases

The Case Jumpstart Wizard helps you get started building the cast of characters and entering information when you create a new case. The wizard also helps you categorize the different types of people and organizations involved in the case. Information populates the All Objects spreadsheet and any applicable sub-level object spreadsheets. Use of the wizard or any wizard page is optional and can be skipped if you do not have any entries. You can also use the Case Jumpstart Wizard any time after the case is created to enter new information. For more information, see: Using the Case Jumpstart Wizard.

### Save time with case templates

As you gain more experience using CaseMap, you will learn the kind of case customizations work best for your practice. For example, you may find that given a particular type of case, you always use the same set of issues, questions, research, spreadsheet views, custom fields, and staff. Case templates provide a way for experienced CaseMap users to save time when creating new cases by promoting reuse of case features. For more information on case templates, see: Case templates.

Related Topics

About cases
Creating cases

## Creating cases

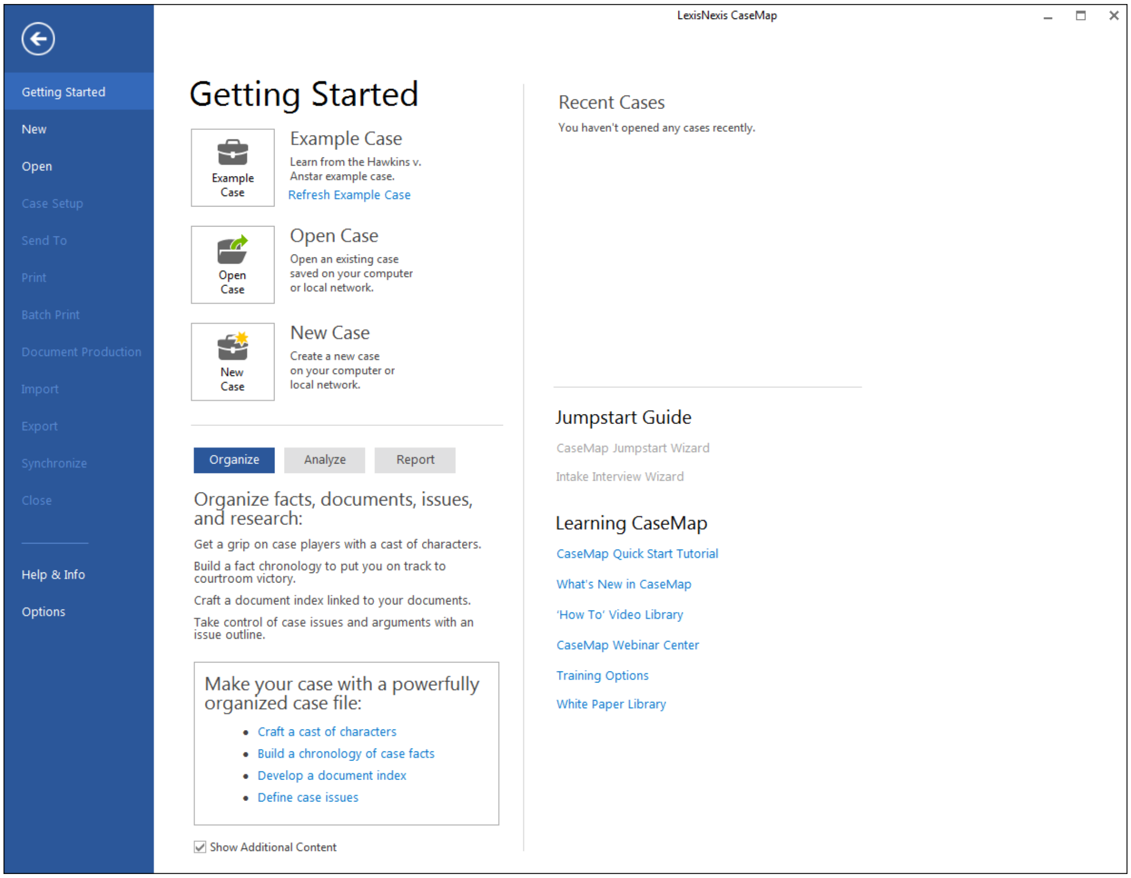
Each case you want to include in CaseMap requires its own case file. A new case can be created quickly so you can add case staff and initial case data within minutes. CaseMap's New Case Wizard provides you with a default new case template that accommodates most of your data entry needs. The example case, Hawkins v. Anstar, uses a new case template.

> Each time you create a new case, it's important to identify the time zone where the facts in the case occurred — not where your organization is located. Once you set the time zone for a case, you cannot reset it later.

> For more information on how to create SQL cases and add users to SQL cases, refer to your CaseMap Server documentation.

### To create a case

1. Click the **File** tab.


LexisNexis CaseMap
Getting Started
New
Open
Case Setup
Send To
Print
Batch Print
Document Production
Import
Export
Synchronize
Close
Help & Info
Options
Example Case
Open Case
New Case
Refresh Example Case
Organize
Analyze
Report
Recent Cases
Jumpstart Guide
CaseMap Jumpstart Wizard
Intake Interview Wizard
Learning CaseMap
CaseMap Quick Start Tutorial
What's New in CaseMap
'How To' Video Library
CaseMap Webinar Center
Training Options
White Paper Library
☑ Show Additional Content

Getting Started

Example Case
Learn from the Hawkins v. Anstar example case.

Open Case
Open an existing case saved on your computer or local network.

New Case
Create a new case on your computer or local network.

Organize facts, documents, issues, and research:

Get a grip on case players with a cast of characters.

Build a fact chronology to put you on track to courtroom victory.

Craft a document index linked to your documents.

Take control of case issues and arguments with an issue outline.

Make your case with a powerfully organized case file:

- Craft a cast of characters
- Build a chronology of case facts
- Develop a document index
- Define case issues

Recent Cases
You haven't opened any cases recently.

2. Click **Getting Started**, and then click **New Case** to launch the **Create New Case wizard**.

   You can also open the New Case Wizard from the New pane by clicking Local Case.

3. In the **Enter case name and default time zone** box, type a name for the case in the **Case name** field.

   You can use spaces, commas, and periods in the name, but you cannot use apostrophes, colons, quotations marks, slashes, or asterisks. We recommend that you don't use any punctuation except for the underscore.

   The case name displays on the CaseMap title bar and prints on reports.

4. In the **Default time zone** list, select the time zone where the case occurs, then click **Next**.

   The case time zone should reflect the primary location of where your case takes place and where most facts and events occur. Once you select the case time zone, you cannot change it later.

5. In the **Select the template to use** dialog box, choose from the following options:

   - Use the default CaseMap template
   - Use a custom template

6. Click the **Add** button to select a pre-existing or custom template.

7. In the **Select Custom Template** box, select the template you want to use, and then click **Open**.

   The selected template name and path now display in the **Select a template** box.

   If you selected the wrong template, click the **Remove** button to delete.

8. Click **Next** to continue.

6. In the **Enter case staff information** box, type in your first and last name in the **Name** field.

> As the case creator, your user ID is automatically entered in the Staff box as an Author, and you are granted access to the default set of spreadsheet views, fields, and saved searches that authors receive.

7. In the **Organization** field, type in the name of your organization.

8. Under the **Do you want to set up addition staff members for this case now** option, select **No** and then click **Next**.

> You can set up users later in File > Case Setup > Edit Staff. Waiting to add users restricts others from accessing the case until you have completed its design.

9. In the **Where do you want to save your file** box, click **Browse** to save the case on your network in the appropriate folder, then click **OK** and **Next**.

   The case file name is the name of the case database file that is saved to your machine or in a network folder.

   The default location for case storage is the My Documents > CaseSoft > CaseMap folder on your hard drive. For other users to access the file, it must be stored in a network folder.

10. Click **Finish** to create the new case.

    Your new case automatically launches within CaseMap so you can begin customizing spreadsheets and adding users. The case is not yet password protected; you can do this on the Tools menu by clicking Change Password.

    The Case Jumpstart Wizard also launches after the new case opens. For more information see Using the Case Jumpstart Wizard.

**Related Topics**

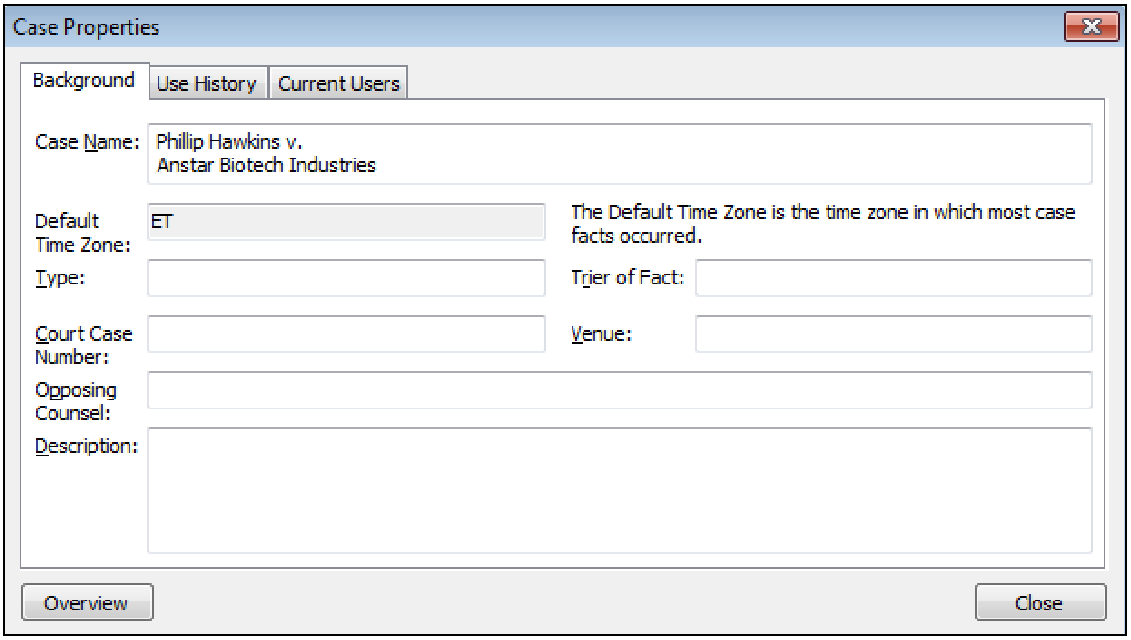
Before creating cases
About cases
Entering case properties
Using the Case Jumpstart Wizard
Creating case templates
Customizing case options

## Entering case properties

Once you've created a case, you can enter general case details for reference purposes, especially the court case number, type of case being tried, and a brief case description.

### ⊟ To enter case properties

1. Click the **File** tab, and then click **Case Setup.**
2. Click the **Case Properties** button to open the Case Properties dialog box.



Case Name: Phillip Hawkins v. Anstar Biotech Industries

Default Time Zone: ET

The Default Time Zone is the time zone in which most case facts occurred.

Type:

Trier of Fact:

Court Case Number:

Venue:

Opposing Counsel:

Description:

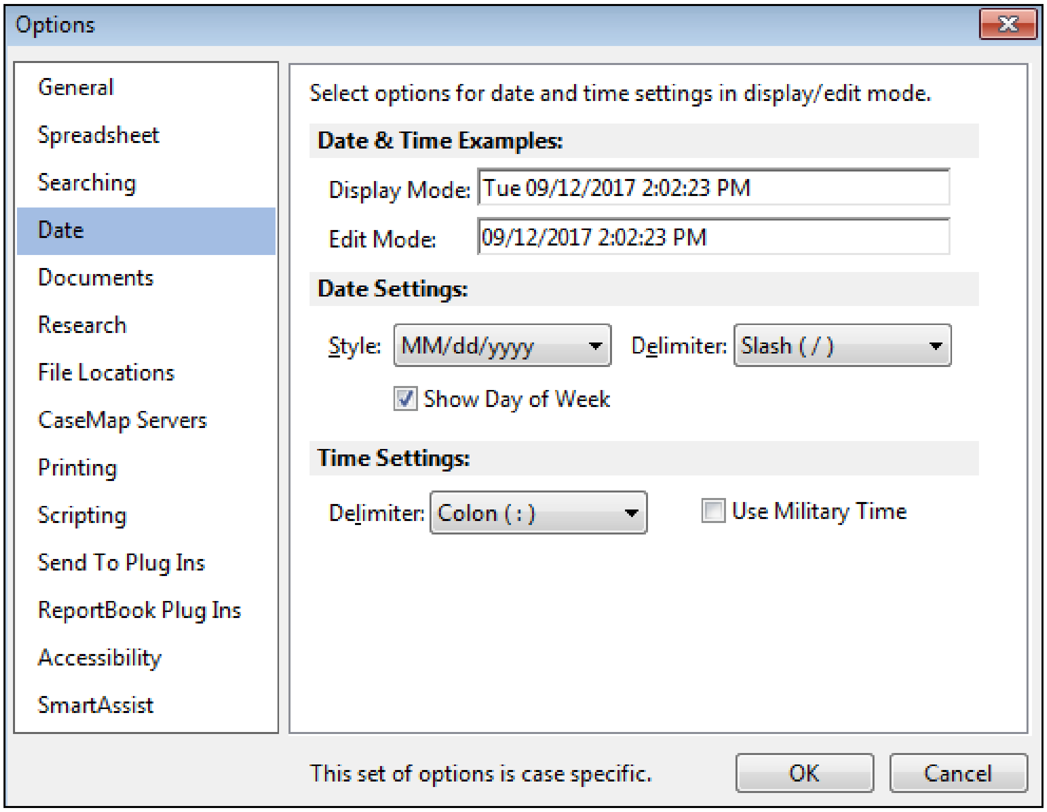
3. On the **Background** tab, enter case specifics such as the court case number, type of case being tried, the judge's name and opposing counsel, where the case is being tried, and a description to summarize the case.
4. Click **Close** to save your entries.

### ⊟ To enter case settings

1. Click the **File** tab, click **Case Setup**, and then click the **Case Settings** drop down menu arrow.
2. Complete the remainder of the procedure as applicable:

#### ⊟ To enter/update date and time settings

a. Click the **Case Settings** drop down menu arrow, and select **Date & Time Settings** to open the Options - Date dialog box.


Options
General
Spreadsheet
Searching
Date
Documents
Research
File Locations
CaseMap Servers
Printing
Scripting
Send To Plug Ins
ReportBook Plug Ins
Accessibility
SmartAssist
OK
Cancel

Select options for date and time settings in display/edit mode.

Date & Time Examples:

Display Mode: Tue 09/12/2017 2:02:23 PM

Edit Mode: 09/12/2017 2:02:23 PM

Date Settings:

Style: MM/dd/yyyy

Delimiter: Slash ( / )

☑ Show Day of Week

Time Settings:

Delimiter: Colon ( : )

☐ Use Military Time

This set of options is case specific.

b. Under **Date Settings**, in the **Style** box, use the drop down arrow to select the Date style setting.

c. Under **Date Settings**, in the **Delimiter** box, use the drop down arrow to select your desired delimiter.

d. Optional: Select the **Show Day of Week** check box to display the day of the week in the **Date & Time** display mode.

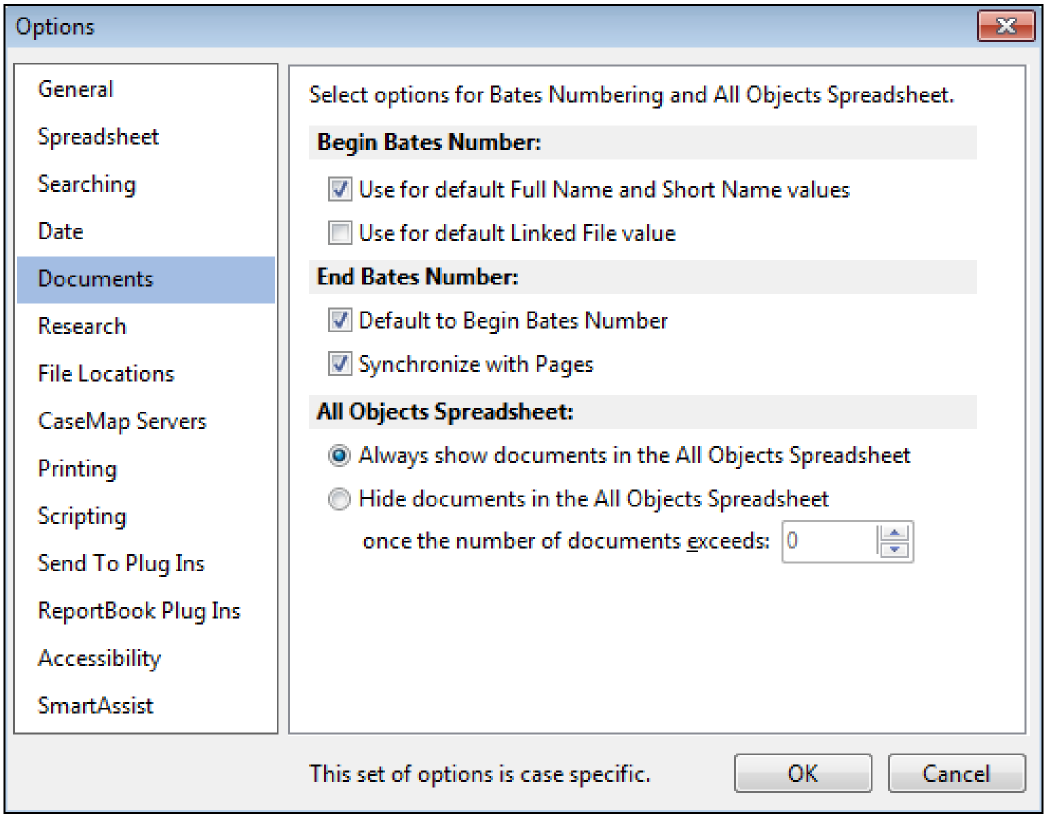
e. Under **Time Settings**, in the **Delimiter** box, use the drop down arrow to select your desired delimiter.

f. Optional: Select the **Use Military Time** check box to display military time in the **Date & Time** display mode.

g. Click **OK**.

### ⊟ To enter document settings

a. Click the **Case Settings** drop down menu arrow, and select **Document Settings** to open the Options - Document dialog box.


Options
General
Spreadsheet
Searching
Date
Documents
Research
File Locations
CaseMap Servers
Printing
Scripting
Send To Plug Ins
ReportBook Plug Ins
Accessibility
SmartAssist
OK
Cancel

Select options for Bates Numbering and All Objects Spreadsheet.

**Begin Bates Number:**

☑ Use for default Full Name and Short Name values
☐ Use for default Linked File value

**End Bates Number:**

☑ Default to Begin Bates Number
☑ Synchronize with Pages

**All Objects Spreadsheet:**

● Always show documents in the All Objects Spreadsheet
○ Hide documents in the All Objects Spreadsheet
once the number of documents exceeds: 0

This set of options is case specific.

b. Under **Begin Bates Number**, select/deselect the applicable check box(es).

c. Under **End Bates Number**, select/deselect the applicable check box(es).

d. Under **All Objects Spreadsheet**, select/deselect the applicable options for the spreadsheet.

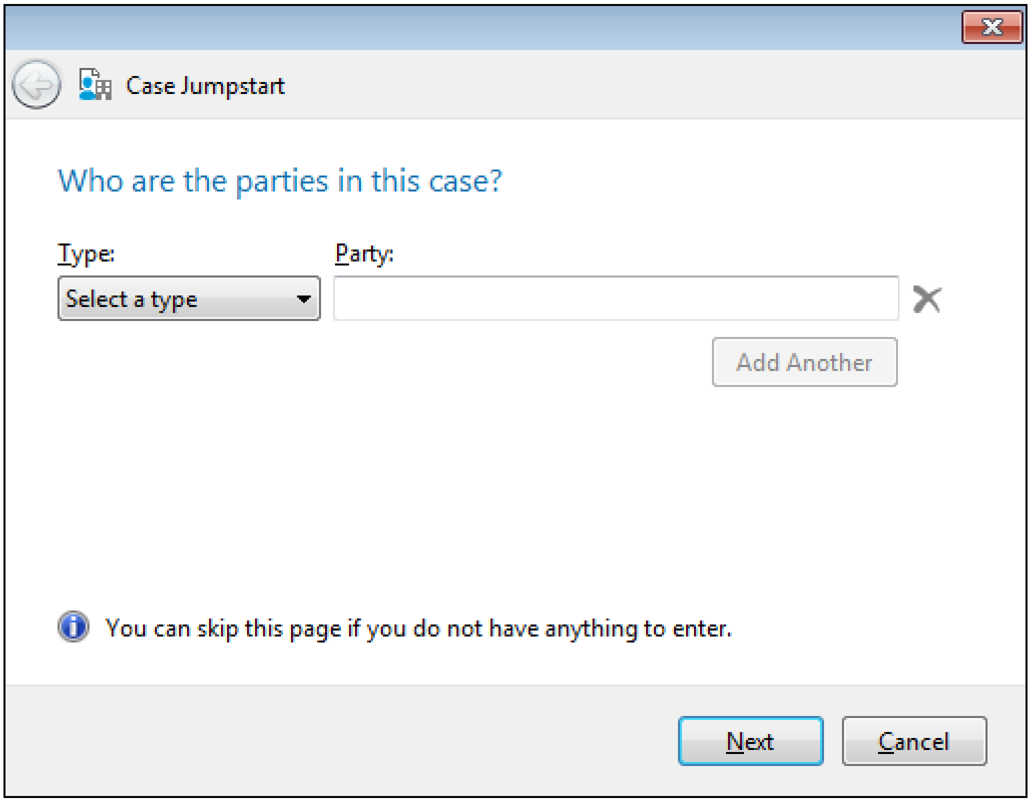
e. Click **OK** to continue.

Related Topics

Creating cases

## Using the Case Jumpstart Wizard

The Case Jumpstart Wizard helps you get started building the cast of characters and entering information when you create a new case. The wizard also helps you categorize the different types of people and organizations involved in the case. Each page is optional and can be skipped if you do not have any entries. As you work with the wizard, check marks display next to the categories that contain information. When you have completed the data entry, the information populates the All Objects spreadsheet as well as the sub-level object spreadsheets.


Case Jumpstart
Who are the parties in this case?
Type:
Party:
Select a type
Add Another
You can skip this page if you do not have anything to enter.
Next
Cancel

You can cancel using the wizard at any time and enter information directly into the All Objects or other object sub-level spreadsheets. If you cancel before clicking Finish, any data you entered in the wizard will not be saved.

You can use the Case Jumpstart Wizard any time after the case is created. Any information already entered in the case will not display in the wizard. CaseMap will not check for duplicate entries. We encourage you to use the All Objects spreadsheet or individual object spreadsheets after your initial use of the CaseMap Jumpstart Wizard.  Access the wizard on the Help menu by clicking Case Jumpstart Wizard.

### ⊟ To use the Case Jumpstart Wizard

1. Click the **File** menu, and under the **Jumpstart Guide** section, click **CaseMap Jumpstart Wizard**.
2. In the CaseMap information box, click **OK** to open the CaseMap Jumpstart Wizard.
3. In the **Type** list (e.g., Organization), click on the appropriate selection.
4. In the **Party** field, type in the applicable information for name, firm, or party.
5. Optional: Click the **Add Another** button to continue adding more people or organizations

for each category.

6. Click **Next** to continue.

   A check mark is placed beside the category once it is completed.

7. Perform **Step 5** through **Step 8** as applicable for all other entries (i.e., Judge, Opposing Counsel, etc.)

8. When you are done, click **Finish**.

   The **All Objects** spreadsheet displays with the people and organizations you entered.

If you don't want the Case Jumpstart Wizard to display each time you create a new case, clear the 'Show when opening a new case' check box.

Related Topics

[Before creating cases]
[About cases]
[Creating cases]

## Case templates

If you find that you are creating the same kind of case over and over, for example, using the same issues, questions, research, and staff, you can save time by using a case template.

***Process of working with case templates***

Here's the process of working with case templates:

1. Create a case and populate it with the staff, issues, research, and any other data you think you may want to reuse. This will serve as the source case for the template file.

2. Create a case template file. In this step, you copy the source file into a new template file. You can exclude facts and other record types from being copied from the source file to the template.

3. Modify the template as needed. Add or remove staff, spreadsheet views, custom fields, reports, and other customizations.

4. Create a new case based on the template. When you create the new case, you can select which staff from the template you want to include in the new case.

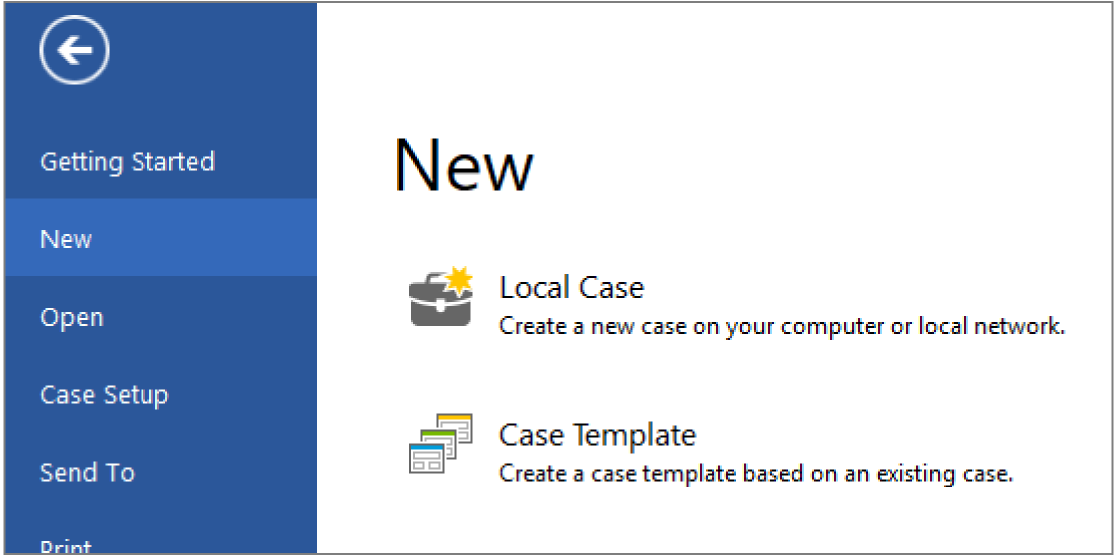
As you create more templates, consider establishing a naming convention for them that will make it easy to recognize which template should be used for a particular kind of case.

**To create a case template**

1. Prepare the case you want to use as the source for the template.

   It is easiest if it already contains the issues, questions, staff, custom fields, reports, and other data you want to reuse. However, these can be added to the template after it has been created.

2. On the **FILE** tab, click **New**, and then click **Case Template**.

   
   Getting Started
New
Open
Case Setup
Send To
Print
New
Local Case
Create a new case on your computer or local network.
Case Template
Create a case template based on an existing case.

   CaseMap closes any open case.

3. In the **Select source case for creating the template** dialog box, browse to and select the CaseMap file you want to use as the source for the template, if it's not already selected, then click **Next**.

> To create the template, CaseMap copies the case into a new template file. The case you select in this step is not changed.

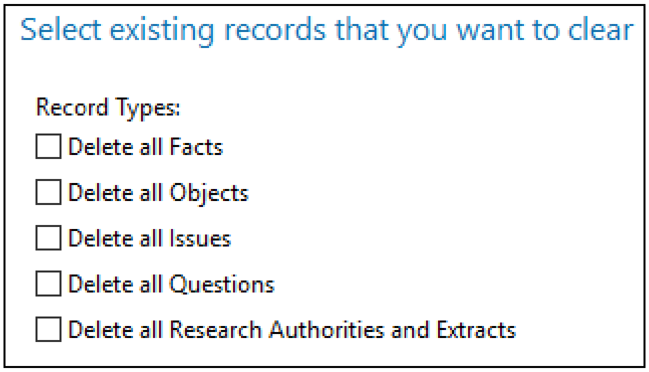
4. In the **Select directory and provide template name** dialog box, do the following:

   a. Click **Browse** and then open the folder where you want to save the template. By default, templates are saved to a designated Templates folder in the CaseMap installation folder.

   b. Type the template name, and then click **Save**.

   c. Click **Next**.

   The **Select existing records that you want to clear** dialog box opens. This is where you can exclude facts and other record types from being copied from the source file to the template.



Select existing records that you want to clear

Record Types:

☐ Delete all Facts
☐ Delete all Objects
☐ Delete all Issues
☐ Delete all Questions
☐ Delete all Research Authorities and Extracts

5. Select check boxes for record types you want to exclude from the template, and then click **Next**.

6. Verify the case source location and the folder and name for the new template, then click **Finish**.

   CaseMap creates the template and then opens it for editing.

7. Sign into the case if prompted.

8. Review the elements of template structure you want to reuse and make changes as needed. For example, these and other items will carry over: spreadsheet views, custom reports, and custom fields.

### ⊟ To create a case from a template

1. Click the **File** tab, click **New** and then click **Local Case**.

2. In the **Create New Case** dialog box, type in the case name, select the time zone where the new case events occur, then click **Next**.

3. In the **Select the Template to Use** box, click **Add,** select the template you want to use, click **Open**, then click **Next**.

4. In the **Manage Staff Members** box, add or remove users, and then click **Next**.

5. In the **Where do you want to save your file** dialog box, do the following:

   a. Type in the name for the case File name field.

   b. Click **Browse**, open the folder where you want to save the new case, and then click **OK**.

   c. Click **Next**.

6. Click **Finish**.

   CaseMap creates the new case and then opens it.

Related Topics

[Before creating cases]
[About cases]
[Creating cases]

## Copying cases

You can copy cases to create custom templates or save a copy of the case for backup purposes. Cases must be closed before you can create a copy of them.

> If you are working in a replica copy of the case that is not saved on the network, you may want to make backup copies on your hard drive (especially if you are updating and/or linking data). We recommend you make a backup folder on your desktop to store the backup until the replica copy is synchronized with the master case. Remember that you can only synchronize the replica copy once with the master case, and cannot synchronize the replica backup copy.

### ⊟ To copy a case

1. On the **File** menu, click **Getting Started**, and then click **Open Case**.

   On the File tab, you can also click Open.

2. Click **Computer** to open the **Open Local Case** dialog box.
3. In the **Open Local Case** dialog box, right-click on the case you want to copy, then click **Copy**.
4. Navigate to the folder where you want to save the copy, then right-click and click **Paste**.
5. Double-click on the case name to rename it or add the word "copy" to the case name.
6. Click **Open** to launch the case copy.
7. If you do not want to work in the case at this time, click **Cancel** in the Case Jumpstart Wizard and then close the case by clicking **File**, and then clicking **Close**.

**Related Topics**

[Creating cases]
[Moving cases]
[Deleting cases]

## Moving cases

Local cases need to be stored in network folders to ensure that other users can access them in CaseMap. When you move a case to another network directory location, you may risk losing links from the case to attached files/documents. The case file and case documents are often stored in separate folders. To ensure case integrity when moving case document folders, use the Change Linked File Paths utility on the Tools > Linked Files menu.

### ⊟ To move a case using Windows

1. Right-click on the Windows **Start** button and click **Explore** to launch Windows Explorer.
2. Navigate to the folder where the case is stored.
3. Copy or drag the case to the new folder.
4. Return to the old folder location and delete the case so it does not exist in two locations.

### ⊟ To re-link case document files using the Change Linked File Paths utility

Use the Change Linked File Paths utility when you move cases on your computer or network that are linked to a case. When running the utility, you must have one of the following spreadsheets open: All Objects, Research Authorities, or Research Extracts.

***Change Linked File Paths utility considerations:***

- You must have network access to the new case folder location in order to move cases and remap the linked files.
- If all the linked files were previously in the same folder, the utility automatically updates all of the links in the current spreadsheet to the new path.
- If the linked files were in multiple locations, you are prompted to select which old path you want to change so only the linked files associated with that path are updated.
- The utility updates records solely on the matching path, disregarding the current filter.

⚠ We strongly recommend that you make a backup of the case before running the Change Linked File Paths utility and making global changes. Restoring a backup of the case is the only way to undo the changes.

### ⊟ To use the Change Linked File Paths utility

1. Open the spreadsheet you need to run this utility program from: **All Objects**, **Research Authorities**, or **Research Extracts**.
2. On the **Case Tools** menu, click **Change Paths**.
3. In the message box, click **OK** if you have already made a backup of the case.
4. In the message directing you to browse to a new location, click **OK** to continue.
5. In the **Browse For Files or Folders** dialog box, navigate to the new folder location, the click **OK**.
6. Verify the old path and new path locations for the case, then click **Yes** to run the utility.

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

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

Related Topics

Copying cases
Deleting cases

## Deleting cases

If you need to delete a case, you may want to to store a copy in an archive folder on your network. Once you delete a case, you cannot retrieve it. All cases and content are erased from CaseMap.

### ⊟ To delete a case

1. On the **File** menu, click **Getting Started**, and then click **Open Case**.

   On the File tab, you can also click Open.

2. Click **Computer** to open the **Open Local Case** dialog box.

3. Navigate to the folder location where the case you want to delete is stored.

4. In the **Open Local Case** dialog box, right-click on the case and click **Delete**.

5. In the **Delete Folder** dialog box, click **Yes**.

   The case and all its contents are now permanently removed from your network and no longer accessible in CaseMap.

6. Click **Cancel** or **Close** to close the Open Case window and return to CaseMap.

7. On the **File** menu, click **Getting Started**, and then click **Open Case**.

8. Click **Recent Cases**, then right-click on the case in the pane you deleted in the step above, and then click **Remove from list**.

Related Topics

Copying cases
Moving cases
Backing up cases

Restoring cases

## About adding users

Case analysis requires a team of staff to help build a case for depositions and trial. Each user may use different aspects of CaseMap to assist in case analysis and management.

CaseMap is simplified to two user types: authors and scribes. User designations are case-specific, so a user can be an author in one case and a scribe in another. Before adding users, we recommend you take some time to determine who the case users are and designate whether they need full access to case data or play a more limited role in assisting case staff.

Having a CaseMap license does not allow users to open cases, they must each be entered as a user in each case. There is no limit on the numbers of users a case can accommodate, however user access should be limited to case staff to preserve the integrity of the case.

Adding users to the case is best done after the case is created and after any custom fields or views are designed. If you add users to a case beforehand, they will each need to re-create any custom fields or spreadsheet views that are prepared for all case users.

For more information on how to create SQL cases and add users to SQL cases, refer to your CaseMap Server documentation.

### ⊟ Authors vs. Scribes

Review the following information to determine how you may differentiate user access for case staff. If you are intent on tracking use history, we recommend that you make all users authors.

### ⊟ Authors receive full access to a case

Authors should include any case users who have the authority to develop information being entered in a case or determine whether information is worth entering. Typically, the partners, associates, paralegals, and in-house counsel working on a case receive this designation. When users are added to a case, CaseMap creates a series of spreadsheet views and Evaluation fields based on the author status.

The case creator is automatically entered as a user in the Staff box and is designated as an author. The first user and all other authors receive access to case spreadsheets and evaluation fields, allowing for immediate productivity in a building the case.

### ⊟ Scribes work on behalf of an author

Scribes are staff that enters information on behalf of an author, such as a legal secretary or temporary assistant. Scribes also receive access to case spreadsheets, but don't have permission to use evaluation fields. Scribes can perform all other author tasks, such as adding and updating case data, printing reports, and so on. When scribes can open a case, they must select the author on whose behalf they are entering. When users are added as a scribes to the case, CaseMap creates a series of spreadsheet views based on the author status.

### Identifying case user roles and types

Use the following checklist to help you determine user access to cases.

| Checklist: Identifying User Roles | |
|---|---|
| | **Task** |
| ☐ | Do you have a list of all case staff? |
| ☐ | Have you identified the team leader? Who is making decisions about the case and communicating to other team members? |
| ☐ | Do you know who is only entering data? |
| ☐ | Do you know who may be importing files in the case? |
| ☐ | Do you know who is reporting and exporting data? |
| ☐ | Have you determined if all team members are Authors, or do some need to be Scribes?<br>*We recommend all staff be identified as Authors for best user history tracking. |
| ☐ | Have you identified users that need to have read-only field access? |

Related Topics

Adding users to cases
Deactivating or deleting users

## Adding users to cases

Staff must be added as users to a case before they can access it within CaseMap. A user may be added to a case at any time.

**Before you add users**

Note the following before adding users to a case:

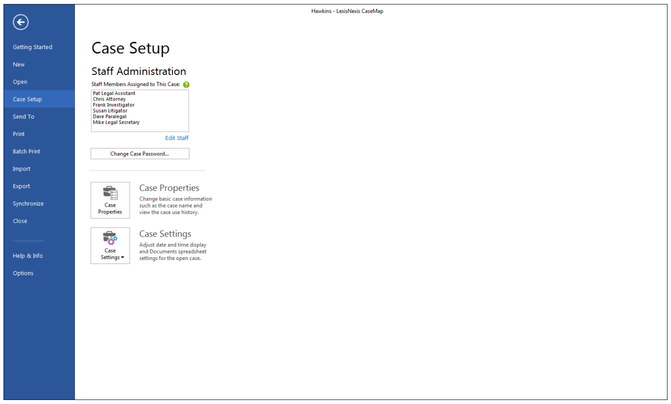
- The process of adding users places a lock on the case. So when you add users, make sure no one else has the case open. After you are done adding users, close the case. This action unlocks the case and allows others to use it.

If you are using CaseMap Server, the procedures for adding users is different. For more information on how to create SQL cases and add users to SQL cases, refer to your CaseMap Server documentation.

- You must have administrative privileges assigned to your user account to add users.

### ⊟ To add users to a case

1. Make sure no one else has the case open that you want to add users to.
2. Open the case you want to add users to.
3. Click the **File** tab, and then click **Case Setup**.


Hawkins - LexisNexis CaseMap
Getting Started
New
Open
Case Setup
Send To
Print
Batch Print
Import
Export
Synchronize
Close
Help & Info
Options
Edit Staff
Change Case Password...
Case Properties
Case Settings

Case Setup

Staff Administration

Staff Members Assigned to This Case:

Pat Legal Assistant
Chris Attorney
Frank Investigator
Susan Litigator
Dave Paralegal
Mike Legal Secretary

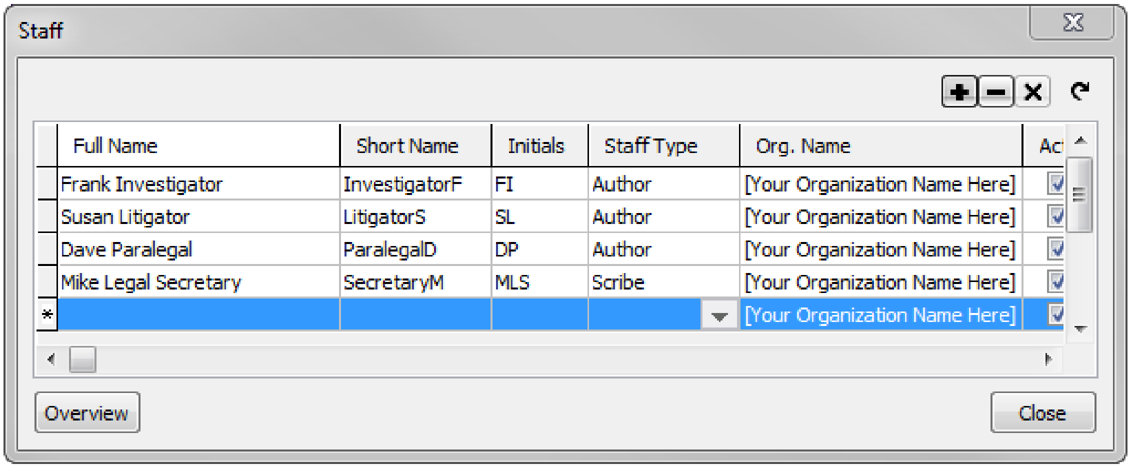
Case Properties

Change basic case information such as the case name and view the case use history.

Case Settings

Adjust date and time display and Documents spreadsheet settings for the open case.

4. Under **Staff Administration**, click **Edit Staff.**


Staff
Overview
Close

| Full Name | Short Name | Initials | Staff Type | Org. Name | Ac |
|---|---|---|---|---|---|
| Frank Investigator | InvestigatorF | FI | Author | [Your Organization Name Here] | ☑ |
| Susan Litigator | LitigatorS | SL | Author | [Your Organization Name Here] | ☑ |
| Dave Paralegal | ParalegalD | DP | Author | [Your Organization Name Here] | ☑ |
| Mike Legal Secretary | SecretaryM | MLS | Scribe | [Your Organization Name Here] | ☑ |
| * | | | | [Your Organization Name Here] | ☑ |

The Edit Staff link is disabled if you do not have permission to edit staff.

5. In the **Staff** dialog box, click the **Add Staff** button ✚ to add a new user.

   You can also right-click on the Staff Type drop down arrow and then select **Add Staff**.

6. In the **Full Name** field, type in the name of the user.

Click the Undo Staff Edit button ✕ if you need to undo any entries.

7. Press **Tab** to move to the next field.

   Notice that CaseMap automatically created a short name and initials for the new staff member. You can modify these default entries, if needed.

8. In the **Staff Type** field, click on the type (author or scribe) for this user. For more information on these roles, see: About adding users.

9. In the **Org. Name** field, type in the organization that represents this user.

10. Scroll to the right and verify that the user is now designated as active and that the **Creation Time** field is stamped.

11. Click the **Refresh Staff Table** button ↻.

12. In the message box, click **Yes** to have CaseMap set up spreadsheet views for the new user.

13. In the **New Views and Filters** box, select the user you want to use as a template for the new user's views, then click **OK**.

    A status box displays as CaseMap updates the user permissions.

14. In the message box, click **OK**.

    The new user is added to the case and the initial log on password is set to blank. New users can set passwords when they log into the case in CaseMap, or by clicking Change Password on the Tools menu.

> The Change Password button is disabled if you are logged into CaseMap Server via Active Directory, or if you do not have permission to change passwords..

15. In the **Staff** dialog box, click **Close** when all new users are added to the case.

16. On the **File** menu, click **Close** to exit the case and re-open it.

**Related Topics**

About adding users
Deactivating or deleting users

## Deactivating or deleting users

When staff members leave the case, you will need to decide whether to deactivate them or delete them. When you choose to deactivate a user, their views, searches, and fields are preserved in the event that they rejoin the case at a later date. If you need to permanently remove a user from a case, you can delete them.

When you are certain that a user no longer needs access to a case, you can permanently delete the user record from the case. All views, searches, and fields associated with the user are permanently removed from the case.

### ⊟ To deactivate user permissions

1. Click the **File** tab, and then click **Case Setup**.
2. Under **Staff Administration**, click **Edit Staff** to open the **Staff** dialog box.
3. In the **Staff** dialog box, select/click on the user you want to deactivate.
4. Under the **Active** column, scroll to the **Active** check box for the user record and double-click to clear check box.

   If this user needs access to this case at a later date, simply select the Active field again.
5. Click **Close** to close the Staff dialog box.

### ⊟ To delete a user

1. Click the **File** tab, and then click **Case Setup**.
2. Under **Staff Administration**, click **Edit Staff** to open the **Staff** dialog box.
3. In the **Staff** box, select the user you want to delete.
4. Click the **Delete Staff** button ⊟ to delete the user record.

   You can also right-click on the Staff Type drop down arrow and then select Delete Staff.
5. In the message box, click **Yes** to delete the staff member, then click **OK**.

   The user record is now permanently deleted from the case and the user can no longer access it.

Related Topics

Adding users to cases

# *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 spreadsheets 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, Issues. The Questions and Research spreadsheet icons display in the All Shortcuts pane. You can change the Favorites pane to display the spreadsheet icons that you use most often. For more information, see Changing shortcuts in the Favorites pane.

The following table provides descriptions of each spreadsheet.

**CaseMap's Five Main Spreadsheets**

| Spreadsheets | Description |
|---|---|
| Facts | The Facts spreadsheet is where you build a fact chronology for the case, including rumors, potential facts, and known facts. Each fact is entered as an individual record and can be linked to issues, people and events (objects), and have attached supporting documentation linked to it for fast reference. |
| Objects | The Objects spreadsheet is where you organize lists of "nouns" in the case, including persons, places, events, documents, evidence, proceedings, and pleadings. The All Objects spreadsheets is a complete listing of all objects in the case, including those contained in sub-topic spreadsheets (which are relevant to a specific object type). |
| Issues | The Issues spreadsheet is used to build your issues outline, including primary and sub-level issues. Once issues are entered, they can be linked to facts, objects, questions, and research in your case. |
| Questions | The Questions spreadsheet is where you brainstorm all questions regarding the case and build an overall "to do" list for everything that needs to be accomplished before trial or at the end of discovery. Use this spreadsheet to assign questions/tasks to case staff, track unanswered questions, and enter questions for upcoming witness depositions. |
| Research | The Research spreadsheet is comprised of three sub-level spreadsheets, which are used to store and organize authorities and authority extracts found when gathering research from case law Web sites. |

## Learn how spreadsheet terminology is different than Excel

While CaseMap's spreadsheets work similarly to Microsoft® Excel, the are a few distinctions in terminology to understand when using the application.

**Spreadsheet Terminology Distinctions**

| CaseMap | Microsoft Excel | Description |
|---|---|---|
| Spreadsheets | Spreadsheets | The different working areas in a CaseMap case that display in the main window pane. Access spreadsheets by clicking icons in the Favorites pane under Case Shortcuts. Spreadsheet views are the basis for creating reports in CaseMap. |
| Fields | Columns | The columns that display in spreadsheet view are known as fields. For example, the Date & Time field stores the date and time when each case fact occurred. A record is made up of fields. A spreadsheet record contains multiple field data. |
| Records | Rows | The information in a case that describes a particular fact, object, issue, question, or research item. Records display in spreadsheet views as rows, running from left to right. |
| Cells | Cells | A cell is where you type data or select a data value. A cell is where a field and record intersect in the spreadsheet. |

Microsoft Excel formulas are NOT accepted in CaseMap. CaseMap runs its own formulas.

### ⊟ Modify spreadsheets views for purpose or preference

CaseMap spreadsheets display fields in a default view for those most commonly used. Each spreadsheet contains additional fields that are hidden from view and can be inserted for display. Most of the fields you need are already created by CaseMap. If you develop a need for a case-specific fields, then you can create custom fields to accommodate that information.

You can also rearrange the order in which fields display to help you focus on specific case analysis. Spreadsheet field order is often organized with a mind set for preserving views for filtering and sorting data as well as printing reports. The printing of spreadsheet data is WYSIWYG (what you see is what you get). And when you run filters or sort data prior to printing reports, you may want to save that spreadsheet view so you can re-run the same search criteria at a later time.

### ⊟ Save spreadsheet views for report purposes

Once you have organized a spreadsheet view that works well for analyzing data, you may want to save it to reference later or print a report. Once you save a spreadsheet view, it displays in the Current view for your personal use. Because CaseMap can turn all your spreadsheet views into reports, any changes you make to a view's layout are tantamount to redesigning a report. When you create new views, you are in effect creating new reports.

### ⊟ Rename spreadsheets for your organization

CaseMap allows you to rename many sub-object spreadsheets to terminology that best suits your organization's needs. Once you save the name change, CaseMap displays the new spreadsheet name in the All Shortcuts pane and all other areas of the CaseMap application, including the Send to CaseMap dialog boxes. When you create reports, the new spreadsheet name will be available for selection and display in the printed report.

### Create custom spreadsheets

Create your own custom sub-object spreadsheet to meet each case's specific needs. You can create as many custom spreadsheets as you like. New custom spreadsheets contain five default fields: Full Name, Short Name, Role In Case, Key, and # Facts. You can add additional fields to the new spreadsheet, as needed. When a new spreadsheet is added, you can begin using it as you would other spreadsheets.

### Delete or move spreadsheets

You can arrange sub-object spreadsheets in the All Shortcuts pane in the order you want them to display. And you can delete those that do not suit your current case needs. When you change the spreadsheet display order or delete a spreadsheet, it is a global change and affects all case users' display order for the All Shortcuts pane.

### Create custom object spreadsheet from existing object spreadsheet

You can duplicate the object spreadsheet structure to capture similar information for additional object types. This allows you to generate the spreadsheet without adding additional columns to capture required information.

Related Topics

- Changing spreadsheet elements
- Creating spreadsheet views
- Changing spreadsheet display order
- Renaming spreadsheets
- Creating custom spreadsheets
- Deleting spreadsheets and records

## Changing spreadsheet elements

CaseMap allows you to make adjustments to spreadsheets to accommodate your personal viewing and printing needs.

***Spreadsheet elements can be customized to:***

- Increase row height for better online viewing
- Change the font display to highlight information (Facts spreadsheet)
- Change the font display in all spreadsheets for your personal view

### To change row height

1. On the **View** ribbon, in the **Current View** group, click on the **Row Height** button.
2. Click a number selection to increase or decrease the row height as preferred.

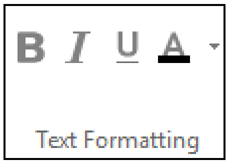
   The minimum is 1 and the maximum is 50.

   Selections affect the active spreadsheet and any associated list dialog boxes, and are adjusted for your personal view only.

> If you select the Auto-Fit check box in the Print dialog box, the row height for a printed spreadsheet is based on the largest amount of text found in a cell. However, if you clear the Auto-Fit check box, the row height for a printed spreadsheet is based on the current row height setting of your on-screen spreadsheet.

### To change the font format in description fields

CaseMap allows you to change the font in the Facts spreadsheet for the description fields like Fact Text, Source(s), and Document Description. You can use color, bold, italics, and underlining to format text for the description statement or just portions of it. Format buttons can be added to the Home ribbon.



All formatted text prints in reports, so be certain you want text to appear that way in any reports you may share with clients or other third parties. Formatted text is also retained when spreadsheet data is exported to Microsoft® Word, Corel® WordPerfect, and HTML when you use CaseMap's Send To feature.

> We recommend that record formatting be kept to a minimum and follow internal guidelines for staff application. Otherwise, the records in a case may become distracting for online analysis, and random font changes that make sense to one user may be confusing to other staff.

### To globally change the font type in spreadsheets

You can also make a global change of the font (type, style, size, and script) used in a spreadsheet by clicking Grid Font on the Current View tab on the View ribbon. This global font change affects the text display in all spreadsheets in CaseMap, but is only visible for your personal view. Whatever font is selected will print in hard copies and Adobe® Acrobat, but does not affect spreadsheet data when it is exported to Microsoft® Word, Corel® WordPerfect, and HTML when you use CaseMap's Send To feature.

### To change the gridline and shade color for PDFs

CaseMap allows you to change the gridline and shade color when printing a spreadsheet to Adobe® Acrobat PDF files. This selection does not affect the spreadsheet view in CaseMap or when data is exported to Microsoft® Word, Corel® WordPerfect, and HTML when you use CaseMap's Send To feature. To change the gridline and shade color, click Options on the File tab, then click Print under CaseMap Options and then select a color from the Gridline and shade color box.

Related Topics

About spreadsheets
Changing spreadsheet views

## Spreadsheet views

### *Creating spreadsheet views*

Once you have organized a spreadsheet view that works well for analyzing data, you may want to save it to reference later or print a report. Once you save a spreadsheet view, it displays in the Current View tab for your personal use and is saved by your user ID.

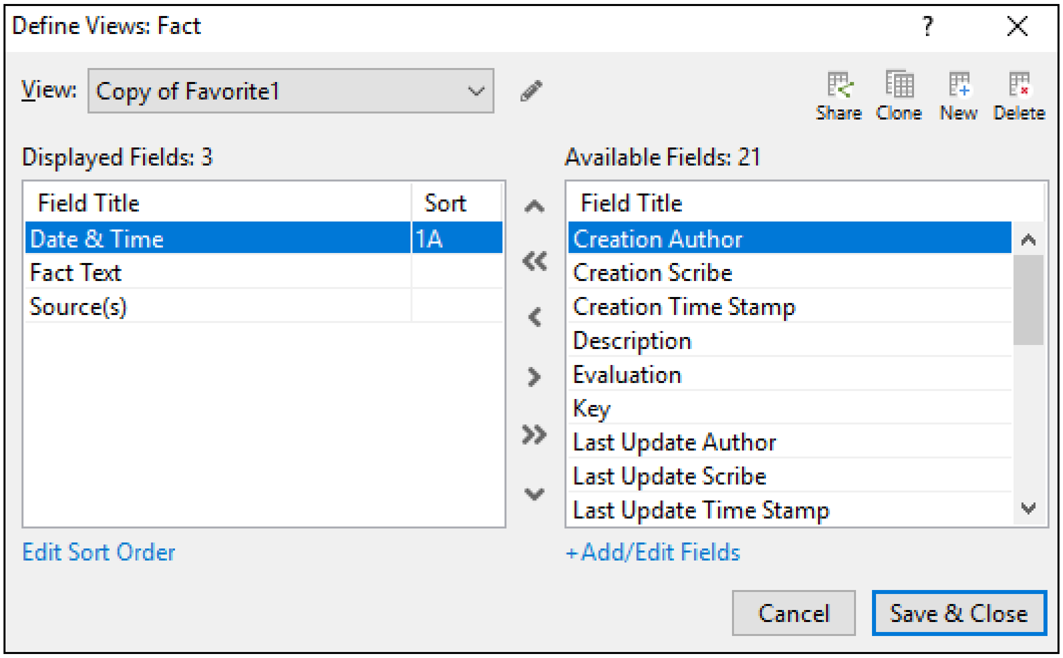
You can share your spreadsheet view to other users. See Sharing custom views for more information.

Because CaseMap can turn all your spreadsheet views into reports, any changes you make to a view's layout are tantamount to redesigning a report. When you create new views, you are in effect creating new reports.

If you design specialized spreadsheet views that may be useful in other cases, export a copy of the case as a template. When you start a new case, import the template into the new case so you don't have to recreate any custom spreadsheet views.

#### To create a spreadsheet view

1. Select the spreadsheet you want to organize.
2. On the **View** ribbon, click **Current View** and then click **Define Views**.


Define Views: Fact
?
View:
Copy of Favorite1
Share
Clone
New
Delete
Displayed Fields: 3
Field Title
Sort
Date & Time
1A
Fact Text
Source(s)
Available Fields: 21
Field Title
Creation Author
Creation Scribe
Creation Time Stamp
Description
Evaluation
Key
Last Update Author
Last Update Scribe
Last Update Time Stamp
Edit Sort Order
+Add/Edit Fields
Cancel
Save & Close

3. In the **Define Views** box, click the **New View** button New.
4. In the **New View** box, type in a name for this spreadsheet view, then click **OK**.
5. In the **Hidden Fields** box, double-click on fields to add them to the **Visible Fields** box for the new spreadsheet view.
6. Click on the **Field Properties** button to reference or modify field properties.
7. Click the **Move Up** or **Move Down** buttons ⌃ ⌄ to organize fields in the order you want them to display.
8. Click **Edit Sort Order** if you want to sort field data for this spreadsheet view.
9. When you are finished, click **OK** to save the view.

   The spreadsheet now displays the fields in the order you selected.
10. On the **View** menu, click **Current View** to verify that the new view is saved and selected on the menu.

### ⊟ To rename a spreadsheet view

1. On the **View** menu, click **Current View** and then click **Define Views**.
2. In the **Define Views** box, click on the view you want to rename in the **View** list.
3. Click the **Rename View** button ✎.
4. In the **Rename View** box, type in the new view name, then click **OK**.

5. Click **Save & Close** to save the new view name.

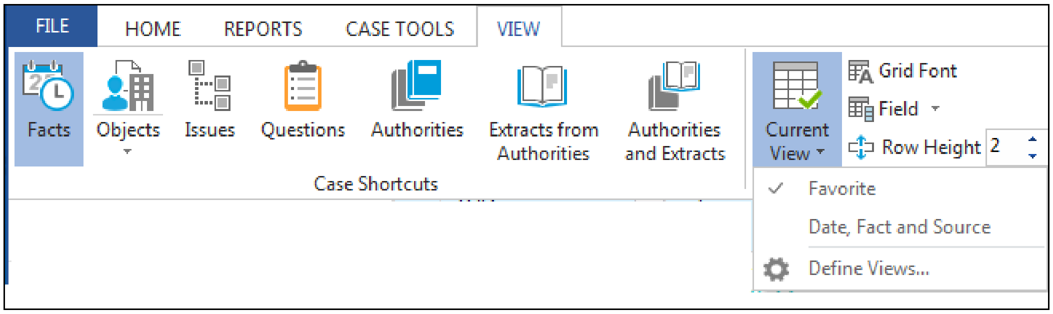
   The new view name automatically displays as an item on the Current View submenu.

Related Topics

- About spreadsheets
- Changing spreadsheet elements
- Changing spreadsheet views
- Copying spreadsheet views
- Deleting spreadsheet views
- Sharing custom views

### *Changing spreadsheet views*

Spreadsheet views can be accessed by clicking the appropriate spreadsheet on View ribbon, located at the top of the application. 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.


FILE
HOME
REPORTS
CASE TOOLS
VIEW
Facts
Objects
Issues
Questions
Authorities
Extracts from Authorities
Authorities and Extracts
Case Shortcuts
Current View
Grid Font
Field
Row Height 2
Favorite
Date, Fact and Source
Define Views...

#### ⊟ To change spreadsheet views

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

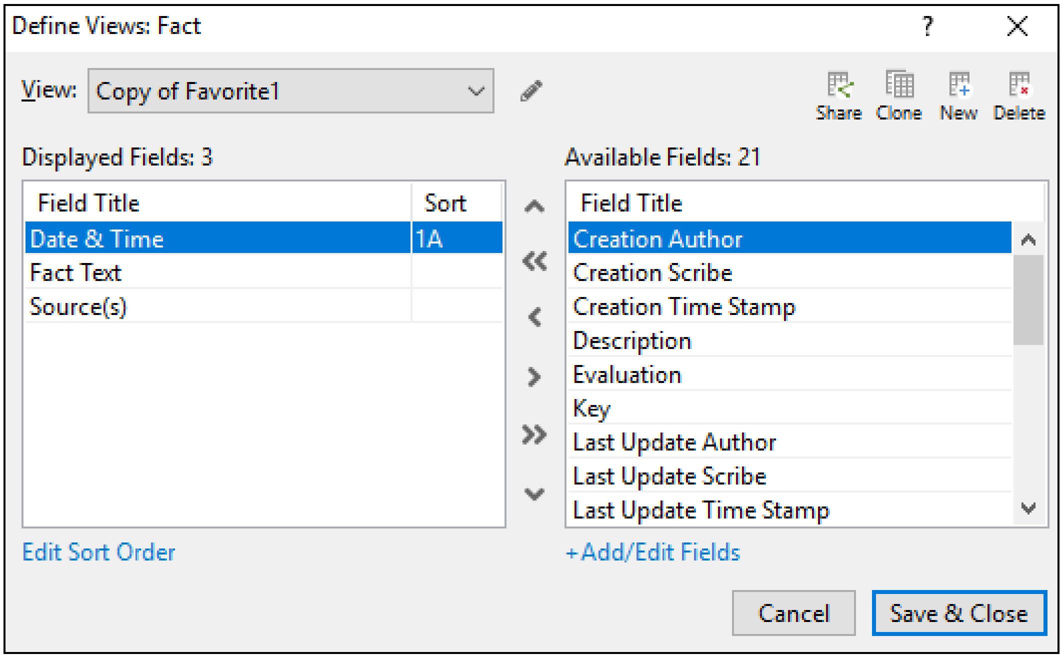
   The spreadsheet automatically modifies the field display for the view selected.

Related Topics

About spreadsheets
Changing spreadsheet elements
Creating spreadsheet views
Copying spreadsheet views
Deleting spreadsheet views
Sharing custom views

### *Copying spreadsheet views*

You can copy a previously saved view to use as a template for creating a new view or for printing a report.



View: Copy of Favorite1

Displayed Fields: 3

| Field Title | Sort |
|---|---|
| Date & Time | 1A |
| Fact Text | |
| Source(s) | |

Available Fields: 21

| Field Title |
|---|
| Creation Author |
| Creation Scribe |
| Creation Time Stamp |
| Description |
| Evaluation |
| Key |
| Last Update Author |
| Last Update Scribe |
| Last Update Time Stamp |

### ⊟ To copy a spreadsheet view

1. On the **View** menu, click **Current View**, and then click **Define Views**.
2. In the **Define Views** box, select the view you want to copy in the **View** list.
3. Click the **Clone View** button Clone.
4. In the **Copy View** box, type in a name for the new view, then click **OK**.

5. Organize the spreadsheet fields in the order you want to them to display.

   Use the arrow buttons (<, >, >>, <<) to add/remove fields from the Visible Fields and Hidden Fields boxes.

   Use the Move Up, Move Down, or Set Sort order buttons ⌃ ⌄ or click **+Add/Edit Fields** to organize field display in the Visible Fields box.

6. Click **Save & Close** to save the new view.

   The new view automatically displays in the spreadsheet pane and is listed as an item on the Current View submenu.

Related Topics

- About spreadsheets
- Changing spreadsheet elements
- Creating spreadsheet views
- Changing spreadsheet views
- Deleting spreadsheet views
- Sharing custom views

### *Deleting spreadsheet views*

If you need to remove a spreadsheet view, you can delete it. Once a view is deleted it permanently removed from the case and no longer displays on the View ribbon's Current View sub-menu.

#### ⊟ To delete a spreadsheet view

1. On the **View** menu, click **Current View** and then click **Define Views**.
2. In the **View** list, click the view you want to delete.
3. Click the **Delete View** button Delete.
4. In the message box, click **Yes** to confirm the action.
5. Click **Save & Close** to save the change.

   The deleted view no longer displays as an item on the Current View submenu.

Related Topics

- About spreadsheets
- Changing spreadsheet elements
- Creating spreadsheet views
- Changing spreadsheet views
- Sharing custom views

### *Sharing spreadsheet views*

You can customize a spreadsheet view and then share it with other case users.

**What is shared?**

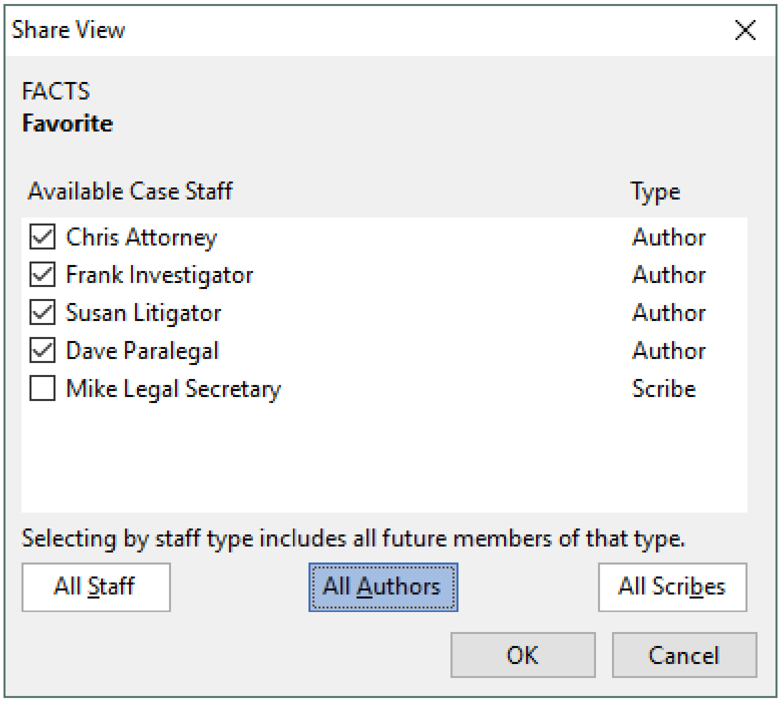
When a view is shared, the following elements of the view are carried over to other users:

- Column selection, including custom fields
- Column order
- Sort order
- View name

**Who can I share my view with?**

A view may be shared with all staff or with users individually. Or you can share the view with members of the author or scribe roles, or with combinations of individuals, authors, and scribes.

Role assignments are made when the case is created. For more information on assigning users to roles and cases, see Adding users to cases.



Share View

FACTS
**Favorite**

| Available Case Staff | Type |
|---|---|
| ☑ Chris Attorney | Author |
| ☑ Frank Investigator | Author |
| ☑ Susan Litigator | Author |
| ☑ Dave Paralegal | Author |
| ☐ Mike Legal Secretary | Scribe |

Selecting by staff type includes all future members of that type.

### Edits and locks

Other users may not edit a view you have shared with them. However, you can open the view again to edit it or to add or remove users. To edit a view you have shared with others, you must first unshare it, which unlocks it for editing. Then you can edit it, and share it again.

### Opening a view shared with you

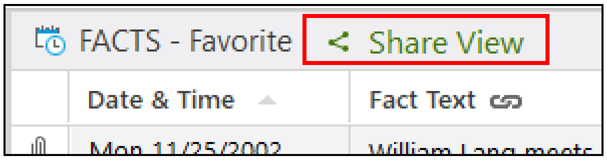
You open a view that has been shared with you from the View menu, the way you open other views you have defined yourself. For more information, see the procedure in this topic on opening a view that has been shared with you.

### Ways to share views

You can share a spreadsheet view directly from the spreadsheet or by using the View menu.

**⊟ To share a spreadsheet view -- using the Share View button**

1. Open a spreadsheet and work with it, customizing the view until you have the view you want to share.
2. Click **Share View**.

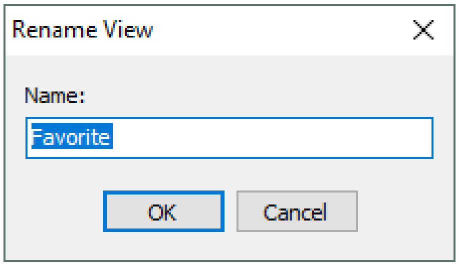


3. Select users to share the spreadsheet view with.
   - ○ To select users individually, select their name in the list.
   - ○ To select groups of users, click **All Staff**, **All Authors**, or **All Scribes**.

  - ○ To exclude a user individually, clear the check box for the user.

4. Click **OK** in the warning saying the name is already in use.

   The Rename View dialog box opens.



Name: Favorite

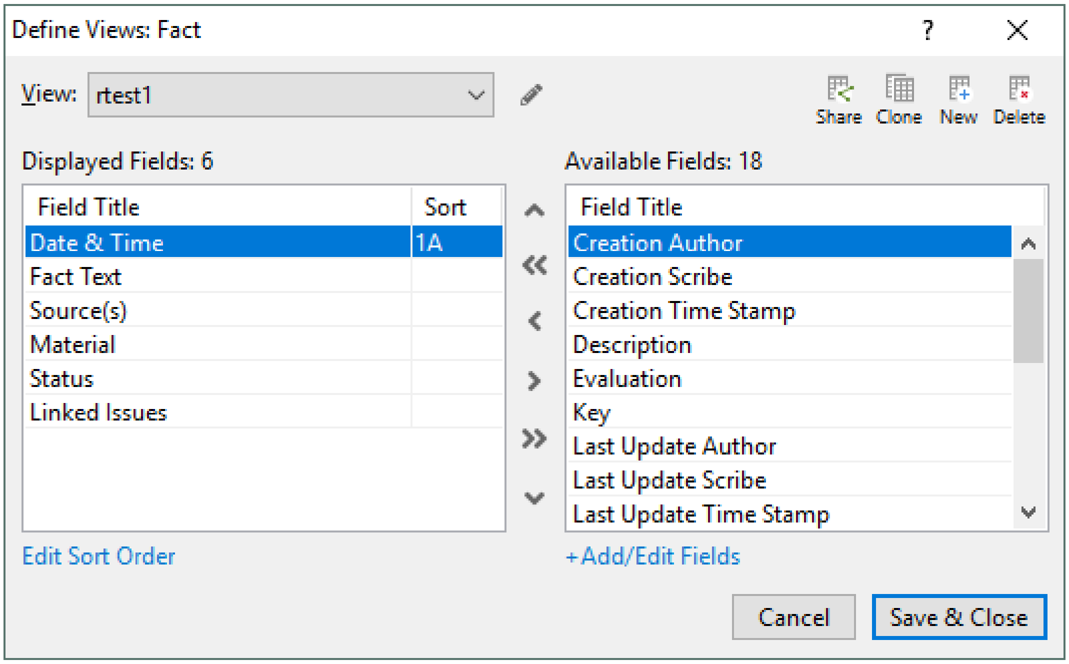
5. Type a name for the view and then click **OK**.

   The spreadsheet view is shared. Users you have shared it with may view it.

### ⊟ To share a spreadsheet view -- using the View menu

1. Open a spreadsheet and work with it, customizing the view until you have the view you want to share.

2. On the **View** ribbon, click **Current View** and then click **Define Views**.



View: rtest1

Displayed Fields: 6

| Field Title | Sort |
|---|---|
| Date & Time | 1A |
| Fact Text | |
| Source(s) | |
| Material | |
| Status | |
| Linked Issues | |

Available Fields: 18

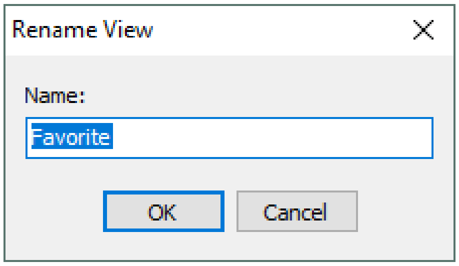
| Field Title |
|---|
| Creation Author |
| Creation Scribe |
| Creation Time Stamp |
| Description |
| Evaluation |
| Key |
| Last Update Author |
| Last Update Scribe |
| Last Update Time Stamp |

**The Define Views dialog box opens.**

3. Edit the view as needed in the Define Views dialog box. For more information on using this dialog box to edit spreadsheet view, see: Creating spreadsheet views.

4. Click the ✎ (pencil) next to the current name of the view.

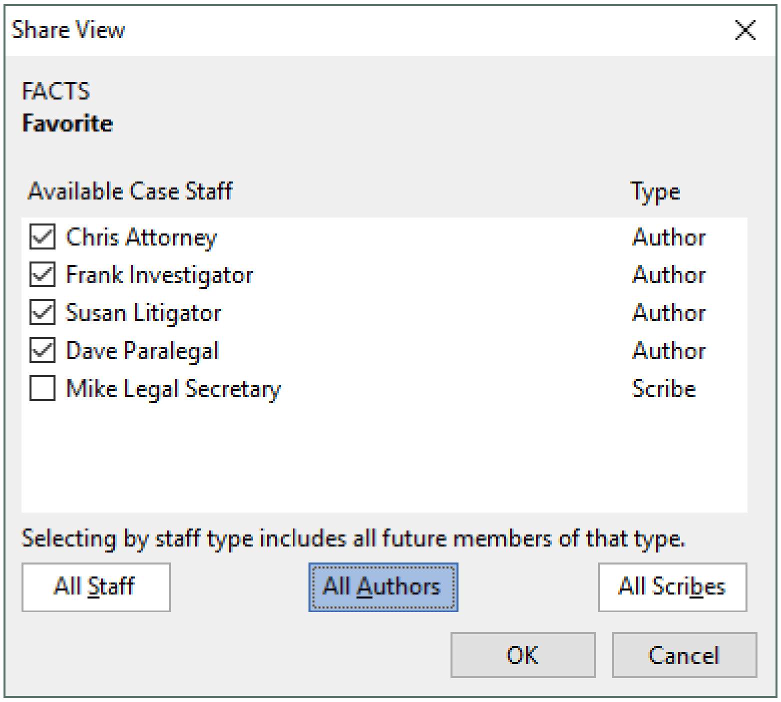
The Rename View dialog box opens.



Name: Favorite

5. Type a name for the view and then click **OK**.

6. Click **Share**.



FACTS
**Favorite**

| | Available Case Staff | Type |
|---|---|---|
| ☑ | Chris Attorney | Author |
| ☑ | Frank Investigator | Author |
| ☑ | Susan Litigator | Author |
| ☑ | Dave Paralegal | Author |
| ☐ | Mike Legal Secretary | Scribe |

Selecting by staff type includes all future members of that type.

**The Share View dialog box**

7. Select users to share the spreadsheet view with. Users can be selected individually from the list or by group membership, as follows:
   - To select user's individually, select their name in the list.
   - To select groups of users, click **All Staff**, **All Authors**, or **All Scribes**.
   - To exclude a user individually, clear the individual user's check box.

8. Click **OK**.

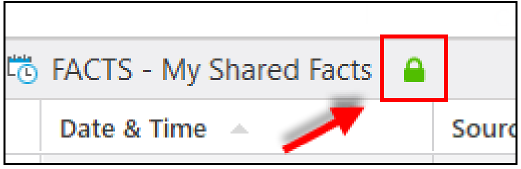
   The spreadsheet view is shared. Users you have shared it with may view it.

### ⊟ To edit a shared view

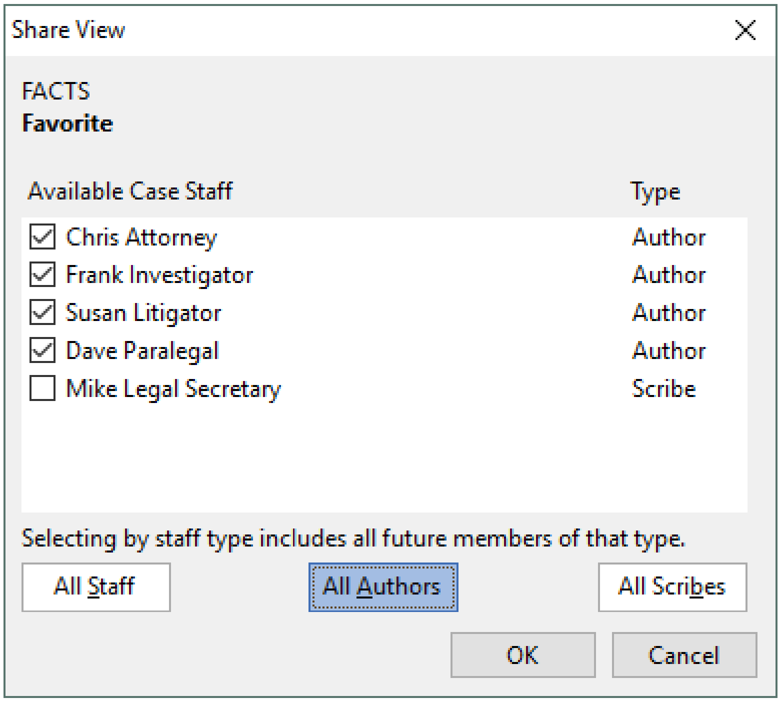
You can change a shared spreadsheet view but first you must stop sharing it.

1. In the CASE SHORTCUTS list, select the spreadsheet type that has the shared view.
   - If the shared view does not open by default, then click **View**, click **Current View**, and then select the shared view you want to edit.

   The shared spreadsheet view opens.



2. Click the lock icon.



FACTS
**Favorite**

| Available Case Staff | Type |
|---|---|
| ☑ Chris Attorney | Author |
| ☑ Frank Investigator | Author |
| ☑ Susan Litigator | Author |
| ☑ Dave Paralegal | Author |
| ☐ Mike Legal Secretary | Scribe |

Selecting by staff type includes all future members of that type.

The Share View dialog box opens.

3. Click **All Staff** until the check boxes are cleared for all users, then click **OK**.
   A warning opens that says the view will no longer be shared.

4. Click **Yes**.
   The spreadsheet view is no longer shared. The lock button is replaced by the Share View link

5. Change the view as needed; when ready to share the view again, click **Share View**.

6. Select staff you want to share the view with, then click **OK**.
   Other staff must close then re-open CaseMap, then they can access the view under the View menu for that spreadsheet.

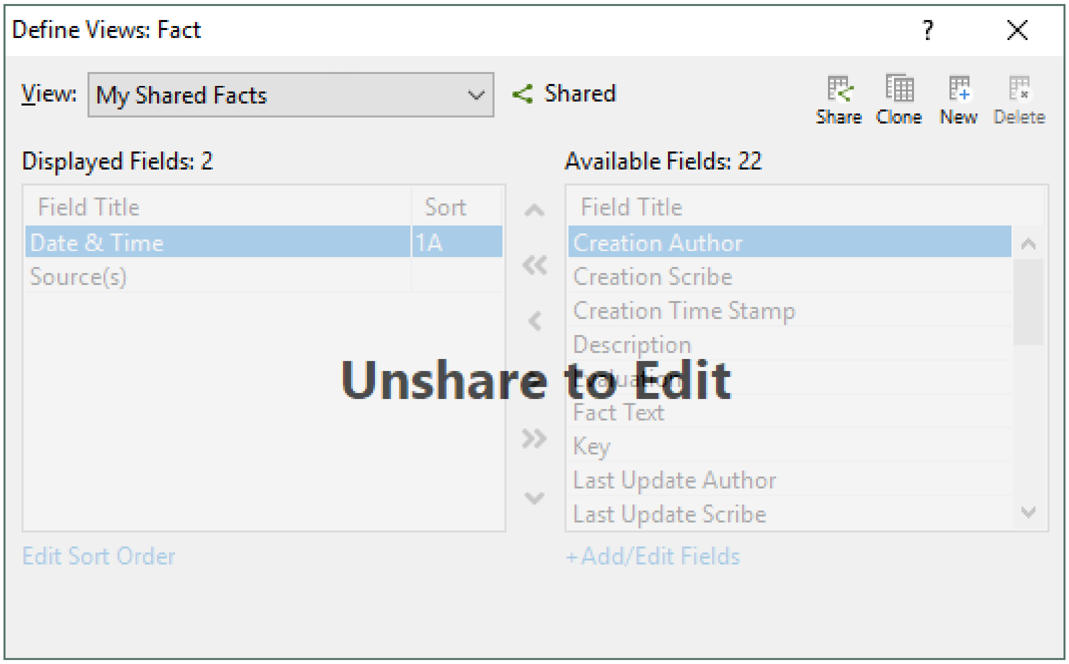
### ⊟ To add or remove users from sharing

If you have shared a spreadsheet view, you can add or remove staff.

1. In the CASE SHORTCUTS list, select the spreadsheet type that has the shared view you

want to add users to or remove them from.

2. On the **View** ribbon, click **Current View** and then click **Define Views**.
    - In the View list, select the shared view you want to work with, if it is not already selected.


Define Views: Fact
?
Shared
Share
Clone
New
Delete
Available Fields: 22
Field Title
Creation Author
Creation Scribe
Creation Time Stamp
Description
Evaluation
Fact Text
Key
Last Update Author
Last Update Scribe
Unshare to Edit
Edit Sort Order
+Add/Edit Fields

View: My Shared Facts

Displayed Fields: 2

| Field Title | Sort |
|---|---|
| Date & Time | 1A |
| Source(s) | |

**The Define Views dialog box prompts Unshare to Edit if a shared view is selected.**

3. Click **Share**.
   The list of users you have shared this view with opens.

4. Select check boxes to add users. Clear check boxes to remove users. Users can be selected individually from the list or by group membership, as follows:
    - To select users individually, select their name in the list.
    - To select groups of users, click **All Staff**, **All Authors**, or **All Scribes**.
    - To exclude a user individually, clear the check box for the user.

5. Click **OK**.

### To delete a shared view

You can delete a view you have shared with other users.

1. Select the spreadsheet type that has the shared view you want to delete.

2. Click **View**, click **Current View**, and then click **Define Views**.
   The Define Views dialog box opens.

3. Click the View list, then select the shared view you want to delete.

4. Click **Delete**.
   A message warns that other users will not be able to use the view anymore.

5. Click **Yes**.
   The view is deleted.

6. Close the Define Views dialog box.

### To open a spreadsheet view that has been shared with you

1. Close the case that has the view that has been shared with you, then re-open the case and sign in.

2. In the CASE SHORTCUTS list, select the spreadsheet that has the shared view associated with it.

3. On the **View** ribbon, click **Current View** and then select the shared view from the list.

   The shared view is loaded.

Related Topics

About spreadsheets
Changing spreadsheet elements
Copying spreadsheet views

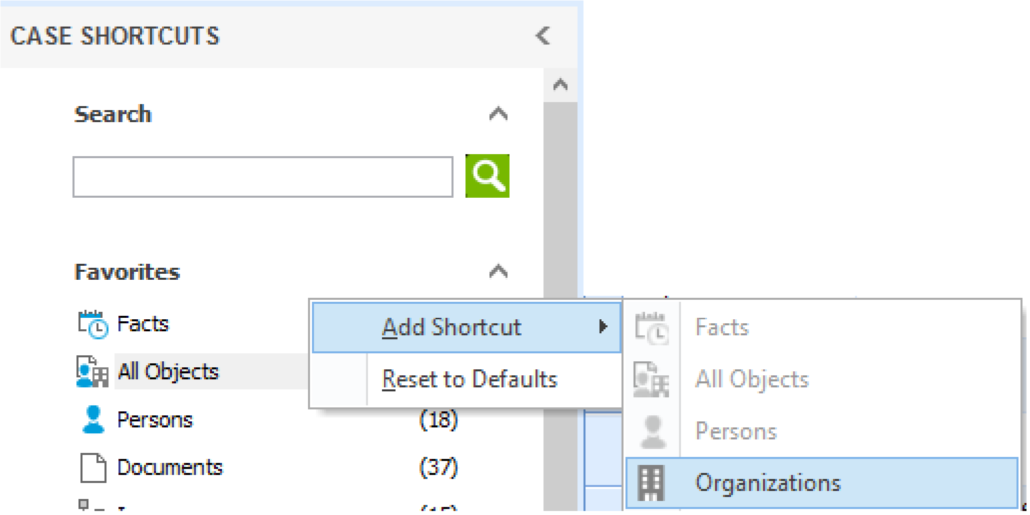
## Changing shortcuts in the Favorites panel

The Favorites pane includes default shortcuts to the following spreadsheets: Facts, All Objects, Persons, Documents, and Issues. You can modify the icons that display in this task pane for those you use most often. And you can rearrange them by preference.

When you customize your Favorite Shortcuts in a case, the settings are saved for your view only. When another user opens a case, CaseMap displays that case's default or custom shortcuts specific to that user.

### To add a spreadsheet icon to the Favorites pane

Right-click in the Favorites pane, click Add Shortcut, and then select the applicable spreadsheet.


CASE SHORTCUTS
Search
Favorites
Facts
All Objects
Persons
(18)
Documents
(37)
Add Shortcut
Reset to Defaults
Facts
All Objects
Persons
Organizations

### ⊟ To reorganize spreadsheet icon order

Right-click and then click Move Up in List or Move Down in List.

### ⊟ To remove a spreadsheet icon from the Favorites pane

Right-click on the shortcut you want to remove and then click Remove from Favorites.

### ⊟ To reset the spreadsheet icon default order

Right-click and then click Reset to Defaults.

Any spreadsheets other than the original default choices are removed from this pane.

Related Topics

Navigating CaseMap
Modifying Navigation pane display
About spreadsheets

## Changing spreadsheet display order

You can change the display order for the list of sub-object spreadsheets in the All Shortcuts pane to an order that works best for you.

***Object spreadsheets you can move include:***

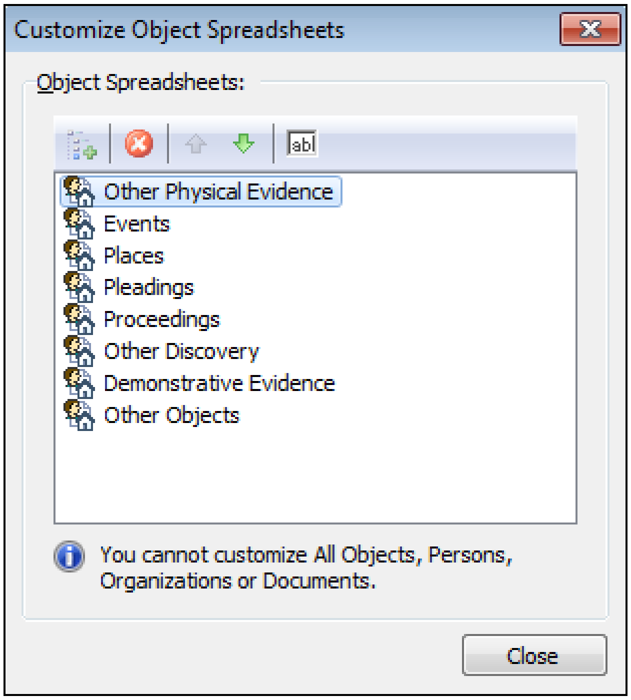
- Other Physical Evidence
- Events

- Places
- Pleadings
- Proceedings
- Other Discovery
- Demonstrative Evidence
- Other Objects

Primary object spreadsheets cannot be moved, including: All Objects, Persons, Organizations, and Documents.

### ⊟ To change spreadsheet display order

1. On the **View** ribbon, under **Objects**, click **Customize**.
2. In the **Customize Object Spreadsheets** dialog box, select the spreadsheet you want to move.



- Other Physical Evidence
- Events
- Places
- Pleadings
- Proceedings
- Other Discovery
- Demonstrative Evidence
- Other Objects

You cannot customize All Objects, Persons, Organizations or Documents.

3. Click the **Move Up** ⇧ or **Move Down** ⇩ buttons until it is in the location where you want it to display.
4. Repeat **Steps 2 and 3** until all sub-object spreadsheets are in the display order you want.
5. Click **Close** to save your changes.

You can also right-click on the sub-object spreadsheet you want to rename and click

Move Up or Move Down until it is in the location where you want it to display.

Related Topics

About spreadsheets
Changing shortcuts in the Favorites pane
Modifying Navigation pane display

## Renaming spreadsheets

CaseMap allows you to rename many sub-object spreadsheets to terminology that best suits your organization's needs. When you rename a spreadsheet, you must provide both a singular and a plural name for it. Each spreadsheet name must be unique for both singular and plural entries. The maximum character limit for a spreadsheet name is 25 characters.

Spreadsheets can only be renamed in the master case. You cannot change spreadsheet names in case replicas or SQL cases. Primary object spreadsheets cannot be renamed, including: All Objects, Persons, Organizations, and Documents.

***Object spreadsheets you can rename include:***

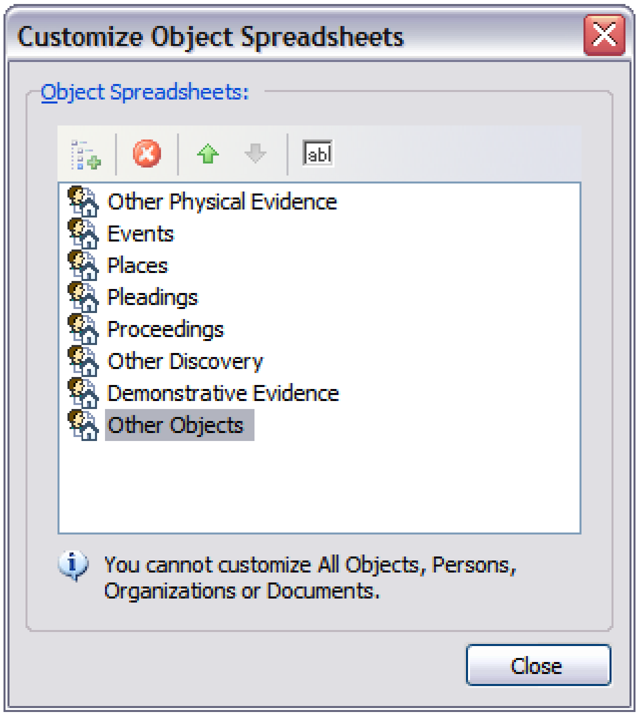
- Other Physical Evidence
- Events
- Places
- Pleadings
- Proceedings
- Other Discovery
- Demonstrative Evidence
- Other Objects

Once you save the name change, CaseMap displays the new spreadsheet name in the All Shortcuts pane and all other areas of the CaseMap application, including the Send to CaseMap dialog boxes. When you create reports, the new spreadsheet name will be available for selection and display in the printed report.

> If you rename the Proceedings or Pleadings spreadsheets and then use the Send to CaseMap tool to send data to the renamed spreadsheet, the Proceedings and Pleadings radio buttons will be grayed out. You need to click Other and then click on the new spreadsheet name in the Other types field list.

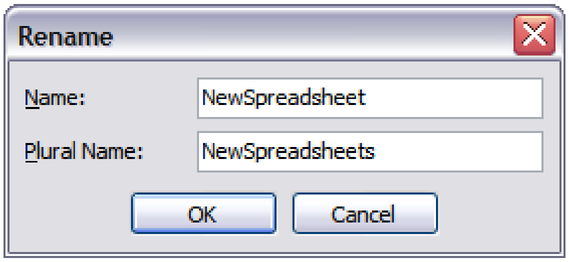
**To rename a sub-object spreadsheet:**

1. On the **View**ribbon, under **Objects**, click **Customize**.
2. In the **Customize Object Spreadsheets** dialog box, select the spreadsheet you want to rename.


Customize Object Spreadsheets
Object Spreadsheets:
Other Physical Evidence
Events
Places
Pleadings
Proceedings
Other Discovery
Demonstrative Evidence
Other Objects
Close

You cannot customize All Objects, Persons, Organizations or Documents.

3. Click the **Rename Spreadsheet** button abl.
4. In the **Rename** dialog box, type in a singular and plural name for the spreadsheet.


Rename
OK
Cancel

Name: NewSpreadsheet
Plural Name: NewSpreadsheets

Once you type in the singular name, CaseMap automatically fills in a suggested plural name for you.

If the new spreadsheet name ends with an "e", you can type an "s" at the end of it to make it plural.

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

You can also right-click on the sub-object spreadsheet you want to rename and click Rename Spreadsheet. Follow Steps 5 and 6 to rename the spreadsheet and save your changes.

Related Topics

About spreadsheets
Creating custom spreadsheets

## Creating custom spreadsheets

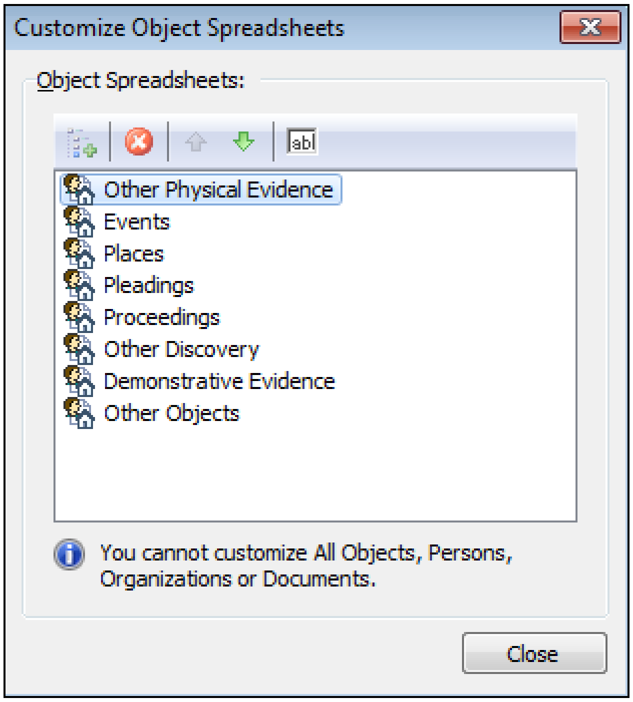
You can create a custom spreadsheets in CaseMap. Note the following facts when creating custom spreadsheets:

- **Naming**. Each custom spreadsheet name must be unique and requires both a singular and plural name.
- **Views and filters.** Adding a new spreadsheet does not affect existing spreadsheet views or filters.
- **Default fields.** New custom spreadsheets contain five default fields: Full Name, Short Name, Role In Case, Key, and # Facts. You can add additional fields to the new spreadsheet as needed.
- **Send to CaseMap.** You can send data to it immediately using the Send to CaseMap tool.
- **Reports**. You can create a report from a custom spreadsheet and add them ReportBooks.
- **Case locks**. Adding a custom spreadsheet locks the case. Other users must be signed out of the case in order to perform this task. Custom spreadsheets can be added to the master case. Users can create a custom spreadsheet in SQL cases.
- **Ways to create custom spreadsheets**. There are two ways to create a custom spreadsheet:
    - Start with an existing spreadsheet. If you have never created a custom spreadsheet, this is the recommended method. It is the easiest way to create a custom spreadsheet because columns and other basic spreadsheet features are created for you.
    - Start with a defualt object template. This method is recommended for advance users.

Custom spreadsheets cannot be added to a replica case.

⊟ **To create a custom spreadsheet from an existing spreadsheet**

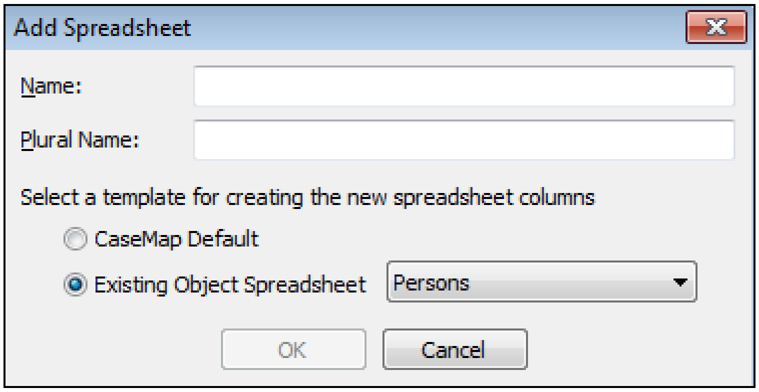
1. On the **View** ribbon, under **Objects**, click **Customize**.
2. In the **Customize Object Spreadsheets** dialog box, click the **Add Spreadsheet** button .


Customize Object Spreadsheets
Object Spreadsheets:
abl
Close

Other Physical Evidence
Events
Places
Pleadings
Proceedings
Other Discovery
Demonstrative Evidence
Other Objects

You cannot customize All Objects, Persons, Organizations or Documents.

3. In the **Add Spreadsheet** dialog box, type in a singular and plural name for the spreadsheet.


Add Spreadsheet
Name:
Plural Name:
OK
Cancel

Select a template for creating the new spreadsheet columns

○ CaseMap Default

● Existing Object Spreadsheet: Persons

Once you type in the singular name, CaseMap automatically fills in a suggested plural name for you.

If the new spreadsheet name ends with an "e", you can type an "s" at the end of it to make it plural.

8. Select the **Existing Object Spreadsheet** option.

9. In the **Existing Object Spreadsheet** drop-down list, click the spreadsheet you want to use to create the new spreadsheet columns.

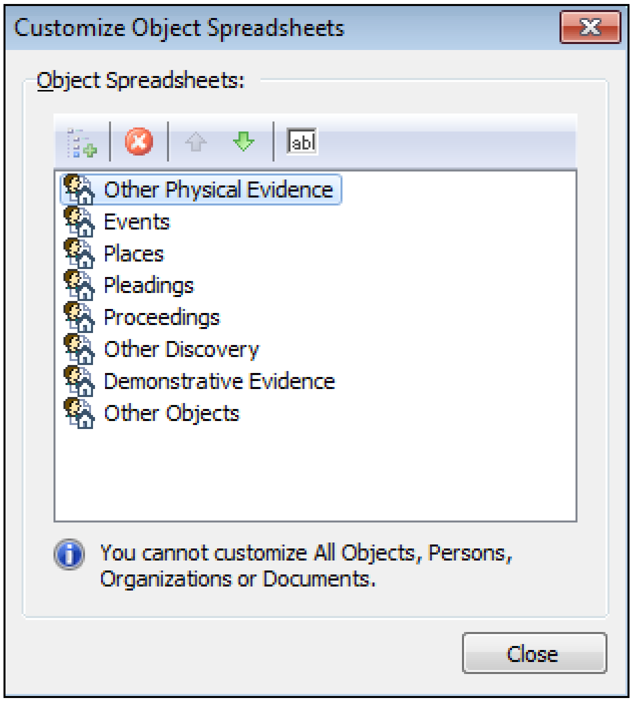
4. Click **OK** to continue.

The new spreadsheet now displays at the bottom of the Objects spreadsheet list.

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

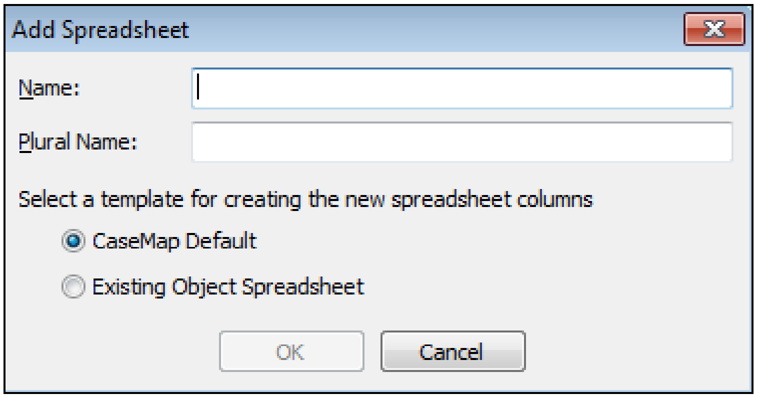
### To create a custom spreadsheet from the default object template

1. On the **View** ribbon, under **Objects**, click **Customize**.
2. In the **Customize Object Spreadsheets** dialog box, click the **Add Spreadsheet** button .


Customize Object Spreadsheets
Object Spreadsheets:
Other Physical Evidence
Events
Places
Pleadings
Proceedings
Other Discovery
Demonstrative Evidence
Other Objects
Close

You cannot customize All Objects, Persons, Organizations or Documents.

3. In the **Add Spreadsheet** dialog box, type in a singular and plural name for the spreadsheet.


Add Spreadsheet
Name:
Plural Name:
OK
Cancel

Select a template for creating the new spreadsheet columns

● CaseMap Default

○ Existing Object Spreadsheet

Once you type in the singular name, CaseMap automatically fills in a suggested plural name for you.

If the new spreadsheet name ends with an "e", you can type an "s" at the end of it to make it plural.

The option to select the CaseMap Default is selected by default.

4. Click **OK** to continue.

   The new spreadsheet now displays at the bottom of the Objects spreadsheet list.

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

Related Topics

About spreadsheets
Renaming spreadsheets
Inserting/hiding fields
Adding a custom spreadsheet to a ReportBook

## Deleting spreadsheets

Deleting a sub-object spreadsheet from the Case Shortcuts pane permanently removes it from the case. Any data in the spreadsheet will also be deleted. If you need to save a copy of the data, you may want to export it before deleting the spreadsheet.

Primary object spreadsheets cannot be deleted, including: All Objects, Persons, Organizations, and Documents.

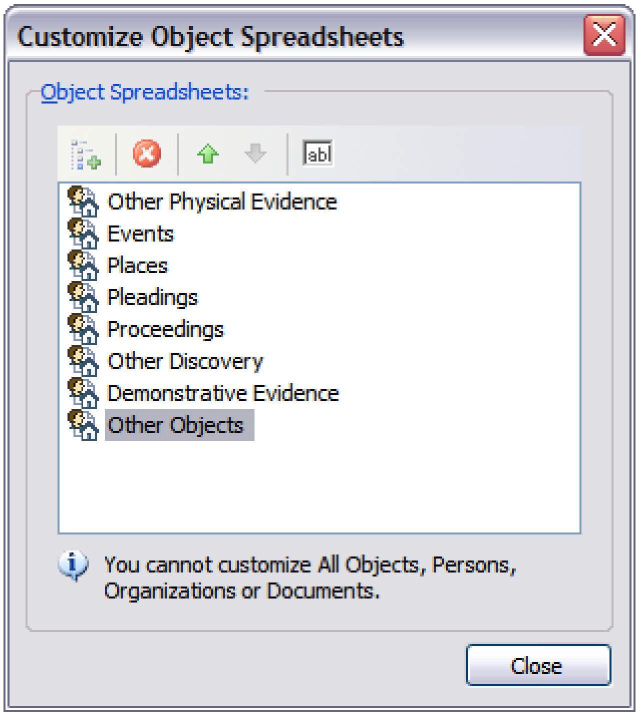
Deleting a spreadsheet is an exclusive process. You cannot delete a spreadsheet in a master case where the spreadsheet exists in an outstanding replica case.

⚠ When you delete a spreadsheet or case record, CaseMap also deletes all annotations in linked files associated with the records and/or spreadsheets. CaseMap then flags the annotated record for deletion. The next time you rebuild the case index, the annotated record will be deleted from the case. Similarly, if you change a linked file in a record to point to another linked file, CaseMap will flag the annotated record for deletion in the case the next time the index is updated.

### ⊟ To delete a spreadsheet

1. On the **View** ribbon, under **Objects**, click **Customize**.

2. In the **Customize Object Spreadsheets** dialog box, click the **Delete Spreadsheet** button ⊗.


Customize Object Spreadsheets
Object Spreadsheets:
Other Physical Evidence
Events
Places
Pleadings
Proceedings
Other Discovery
Demonstrative Evidence
Other Objects
Close

You cannot customize All Objects, Persons, Organizations or Documents.

3. 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.

You can also right-click on the sub-object spreadsheet you want to delete and click Delete Spreadsheet. Follow Steps 3-5 to complete the procedure.

Related Topics

[About spreadsheets]
[Renaming sub-object spreadsheets]
[Inserting/deleting records]

## Spreadsheet fields

### *About spreadsheet fields*

CaseMap uses fields to store and display information about case elements. Each spreadsheet has many pre-defined fields associated with it and displays the most commonly used in view as columns. You can insert additional fields into a spreadsheet view, depending on your needs.

You may also create custom fields to capture case-specific information. The custom fields you create work just like the fields in CaseMap.

Custom fields also appear in spreadsheet views and detail dialog boxes, and can be used to filter and tag spreadsheet data. As with any field, custom fields print on reports as long as they are displaying in spreadsheet view.

Place your mouse mouse pointer over a field header to view field descriptions and specific properties, such as read-only or non-sortable.

If you are using CaseMap Server and have a SQL case open, you may not have permissions granted for creating and deleting spreadsheet fields. If so, these features will be disabled or grayed out in the Select Field(s) to Insert dialog box.

## Field values are stored information

A field's "value" refers to the information stored in a field's cell for a particular fact, object, issue, or question record. Fields store the same information for each spreadsheet record. For example, a field in the Facts spreadsheet will store the same type of information (dates, Material status, linked files, etc.) for each fact record entered in this spreadsheet.

## Learn the four field types

There are four types of fields in CaseMap. Each case contains multiple fields for each of these types. Each field can be named specific to the information it contains. You can only enter information in Trait and Evaluation fields. CaseMap enters and updates information in the # fields and Update History fields.

For a complete listing of the fields and types of fields in each spreadsheet, see the following field listings: Issues, Facts, Objects, Questions, and Research.

**CaseMap's Field Types**

| Fields | Description |
|---|---|
| Trait | Captures objective information for each case record. Data fields allow text entry for letters, numbers, characters, or check box selections (Yes/No). Text entries have character limitations that vary.<br>Create custom Trait fields to augment CaseMap's predefined fields. |
| Evaluation | Captures assessment information for case records. Fields display a fixed listing of evaluation values. The scale for facts, objects, and issues is Weight. The scale for questions is Criticality.<br>Create custom Evaluation fields for each author to augment CaseMap's predefined fields. Then use the Evaluation Comparison tool to determine if evaluations are consistent or divergent. |
| # (Number) | Counts the relationships between different types of case information, such as a link between a person and a fact. Fields allow for linking to short name elements as data entry occurs. Fields with a number sign (hash |

**CaseMap's Field Types**

| Fields | Description |
|---|---|
| | mark) in the field name (# Facts field) count the number of links between case elements.<br>These fields are useful in reports for displaying information based on these counts. You cannot create custom # fields. |
| Update History | Tracks information for when a case record was created or updated, and who created or update it.<br>CaseMap automatically captures update history when a user enters information in a record. You cannot create custom Update History fields. |

## ⊟ Fields display in three locations

Fields display in three locations in CaseMap: spreadsheet views, list dialog boxes, and detail dialog boxes.

Fields function exactly the same way whether they appear as a column in a spreadsheet or as a row in a detail dialog boxes. If you type information into a field in a spreadsheet, then you will type information in that field too if it displays in a detail dialog boxes. If you select information in a field in a spreadsheet, then you will select information in that same field in displaying in a detail dialog boxes. However, you cannot enter or update field information in list dialog boxes. List dialog boxes display information as read-only.

**CaseMap Field Display**

| Location | Description |
|---|---|
| Spreadsheets | Fields display as columns. You can determine what fields display in view and arrange the order in which they appear. |
| List dialog boxes | Fields display as columns and are fixed fields; the same fields always display. For example, the Fact List dialog box always displays the Date & Time field, the Fact Text field, and the Source(s) field. Read-only.<br>Double-click in a # field to access a list dialog box. |
| Detail dialog boxes | Displays all fields associated with a particular case element. Fields display as rows listed alphabetically. Click the Record Detail button on the Home ribbon in CaseMap or the Home ribbon in the DocManager to access a record's detail dialog box. |

## ⊟ Field considerations to note

The following table provides an overview of spreadsheet field structure, depending on type.

**Field Considerations**

| Fields | Description |
|---|---|
| Description 🔗 | Holds up to 10,000 characters or 5.5-6 pages of single text (by default). Recognizes short names. Cannot sort data.<br>* You can increase the number of characters for this field to more than 10,000 by changing the field value. |
| Text | Holds up to 35 characters. Does not recognize short names. Sortable. |
| Number fields | Drops the lead 0. Rounds numbers with decimals. |
| Number (Integer and Currency) | Cannot remove the $ or decimal. |
| Fixed lists | Displays field values in a drop-down list that is not editable. |
| Open-ended field lists (+) | Open-ended field lists display a plus sign in the field header. Displays field values in a drop-down list that can be augmented by users. |
| # Fields | Fields that count the relationships between different types of case information, such as a link between a person and a fact. These fields are useful in reports for displaying information based on these counts. You cannot create custom # fields. |
| Chain link fields | Fields that have a chain link in the header are fields that recognize short names. |
| Gray fields | Fields that have a different background color, like gray, are read-only. You cannot enter or update information in these fields. For example, # fields and Update History fields are read-only as CaseMap automatically updates this information for you. |

## # fields count links between case elements

# fields all begin with a number or hash mark symbol. These fields count the relationships between different types of case elements in a case and display the resulting count (67 facts linked to Fraud issue). # fields also help you explore the connections between facts and issues, between objects and issues, and between facts and objects. # fields are read-only and created for CaseMap. You cannot create your own custom # fields.

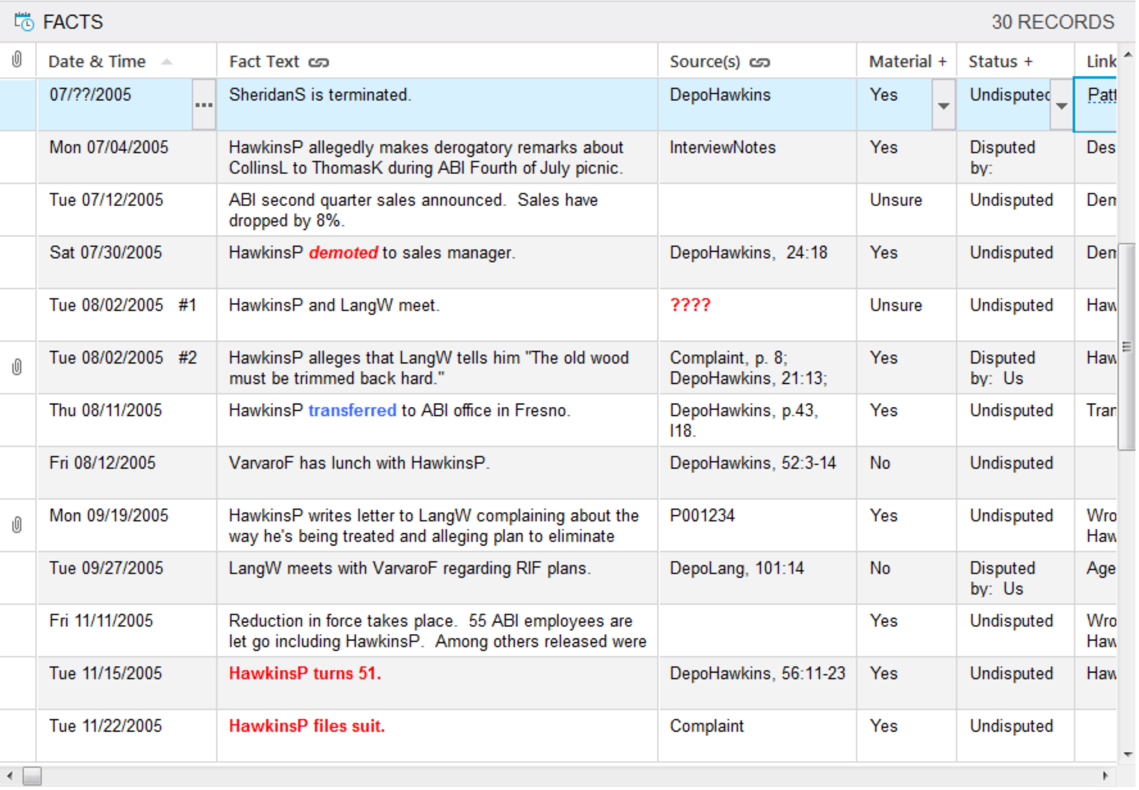
You can filter and tag spreadsheet views based on values in a # field. For example, you can filter the Objects spreadsheet so that only those objects linked to 25 or more facts display.

### Basic vs. filtered # fields

There are two types of # fields: basic and filtered. A basic # field counts all links between two case elements (58 facts linked to Wrongful Termination issue). A filtered # field counts only those links that meet certain criteria. For example, the # Undisputed Facts field counts the number of undisputed facts linked to each issue on the Issues spreadsheet (23 undisputed facts linked to the Wrongful Termination issue).

### ⊟ Click to see a list dialog box

Double-click in a # field cell or click the Ellipsis button to display a list dialog box detailing all records represented in the field count. You can also print, print to PDF, or export the data in the list dialog box if needed. Fields displayed in a list dialog box can be customized by clicking on a field header.



FACTS 30 RECORDS

| 📎 | Date & Time | Fact Text | Source(s) | Material + | Status + | Link |
|---|---|---|---|---|---|---|
| | 07/??/2005 | SheridanS is terminated. | DepoHawkins | Yes | Undisputec | Patt |
| | Mon 07/04/2005 | HawkinsP allegedly makes derogatory remarks about CollinsL to ThomasK during ABI Fourth of July picnic. | InterviewNotes | Yes | Disputed by: | Des |
| | Tue 07/12/2005 | ABI second quarter sales announced. Sales have dropped by 8%. | | Unsure | Undisputed | Den |
| | Sat 07/30/2005 | HawkinsP *demoted* to sales manager. | DepoHawkins, 24:18 | Yes | Undisputed | Den |
| | Tue 08/02/2005 #1 | HawkinsP and LangW meet. | ???? | Unsure | Undisputed | Haw |
| 📎 | Tue 08/02/2005 #2 | HawkinsP alleges that LangW tells him "The old wood must be trimmed back hard." | Complaint, p. 8;<br>DepoHawkins, 21:13; | Yes | Disputed by: Us | Haw |
| | Thu 08/11/2005 | HawkinsP transferred to ABI office in Fresno. | DepoHawkins, p.43, l18. | Yes | Undisputed | Trar |
| | Fri 08/12/2005 | VarvaroF has lunch with HawkinsP. | DepoHawkins, 52:3-14 | No | Undisputed | |
| 📎 | Mon 09/19/2005 | HawkinsP writes letter to LangW complaining about the way he's being treated and alleging plan to eliminate | P001234 | Yes | Undisputed | Wro<br>Haw |
| | Tue 09/27/2005 | LangW meets with VarvaroF regarding RIF plans. | DepoLang, 101:14 | No | Disputed by: Us | Age |
| | Fri 11/11/2005 | Reduction in force takes place. 55 ABI employees are let go including HawkinsP. Among others released were | | Yes | Undisputed | Wro<br>Haw |
| | Tue 11/15/2005 | **HawkinsP turns 51.** | DepoHawkins, 56:11-23 | Yes | Undisputed | Haw |
| | Tue 11/22/2005 | **HawkinsP files suit.** | Complaint | Yes | Undisputed | |

### ⊟ Where # fields display

# fields display as columns in the Facts, Objects, Issues, and Research - Authorities spreadsheets. Like other CaseMap fields, you determine what views display # fields and can arrange the order in which they display. # fields also display in the Fact, Object, and Issue dialog boxes. # fields do not display on the Questions spreadsheet or in the Question dialog boxes.

### ⊟ Slow machines affect refresh time

CaseMap recounts the links and updates the field count each time a spreadsheet is refreshed. If you have a slower machine, CaseMap's ability to refresh the # field count can be compromised when you display three or more # fields in a spreadsheet view.

## ⊟ Evaluation fields track case strengths and weaknesses

Evaluation fields are used to analyze and communicate the records in a case for strengths and weaknesses. Instead of entering text, symbols are selected to indicate Weight for facts, objects, and issues, or Criticality for questions. Use evaluation fields to track and compare your estimates of the case compared to other case staff.

CaseMap automatically creates Evaluation fields, by default, for the Questions spreadsheet. If you want to use an Evaluation field on the Facts, Issues, or any object spreadsheets, you must create it yourself in the Field Properties dialog box as would create any new field. There is no limit to the number of Evaluation fields that can be created.

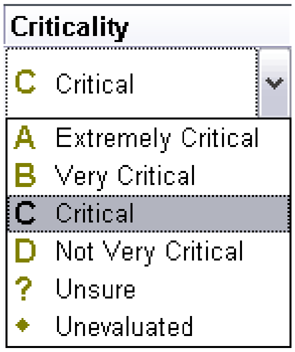
If you have the same case staff working on the same types of cases, you may want to consider making a case template that includes the Evaluation fields you find most useful to use in new cases (instead of using the default case template). Doing so will save you time in re-creating these fields for each new case.

## Where Evaluations fields display

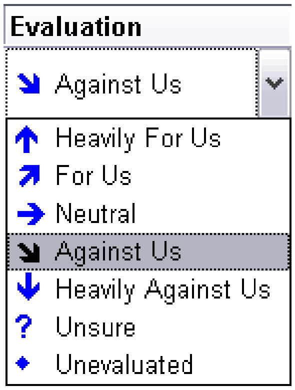
Evaluation fields display in spreadsheet views, detail dialog boxes, and in the Evaluation Comparison dialog box. In spreadsheet views, Evaluation fields display as columns. In detail dialog boxes, Evaluation fields display as rows. In the Evaluation Comparison dialog box, you choose two Evaluations fields to display to compare their values.

## What scale to use when creating an Evaluation field

CaseMap uses the Criticality scale for the Evaluation field on the Questions spreadsheet. The Criticality field values are shown in the following screen shot.



If you create your own custom Evaluation field, the scale provided is Weight. The Evaluation field's values are shown in the following screen shot. If you create more than one Evaluation field for a spreadsheet, the field values will be the same so it's best to have a distinct name for each field you create.



### Sort, filter, and tag information in Evaluation fields

Evaluation field information can be sorted, used in a search filter, and tagged. Sort information in Evaluation fields to view the scale values by symbol type. Evaluation fields can be selected in a search filter and the results can be tagged. For example, you can sort on the Criticality field on the Questions spreadsheet to list the most critical questions first . You can also sort an Evaluation field created on the Facts spreadsheet so you can view all facts that weigh Heavily Against Us first.

For more information, see Changing the field sort order, Performing basic searches, Tagging case records.

### Create multiple Evaluation fields to compare evaluations

Having multiple Evaluation fields based on the same scale allows you to compare evaluations with other case staff. To do this, create a spreadsheet view that includes one or more of your own Evaluation fields, as well as those made by other case staff. When you view this spreadsheet, review the field values for each record to where evaluations match or differ. You can also use the Evaluation Comparison dialog box to perform a more thorough analysis of the similarities and differences among team evaluations.

For more information, see About evaluation tools.

Related Topics

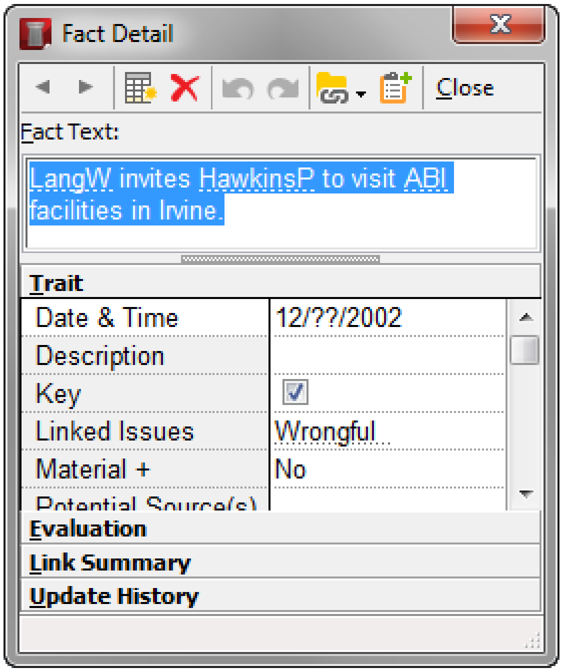
Accessing Detail and List dialog boxes
Inserting/hiding fields
Moving fields
About evaluation fields

### *Accessing detail and list dialog boxes*

Detail and list dialog boxes provide additional case record data that you can update or review.

## Detail dialog boxes

Detail dialog boxes make it easy to view and update all information in a case for one particular fact, object, or other case element at a time. Differences between detail dialog boxes for different spreadsheet records are minor. Once you learn how to use a detail dialog box for one type of case element, you know how to use it for the others. Click the Detail button located on the Home ribbon in CaseMap to access a record's detail dialog box.



Fact Text:

LangW invites HawkinsP to visit ABI facilities in Irvine.

**Trait**

| | |
|---|---|
| Date & Time | 12/??/2002 |
| Description | |
| Key | ☑ |
| Linked Issues | Wrongful |
| Material + | No |
| Potential Source(s) | |

**Evaluation**

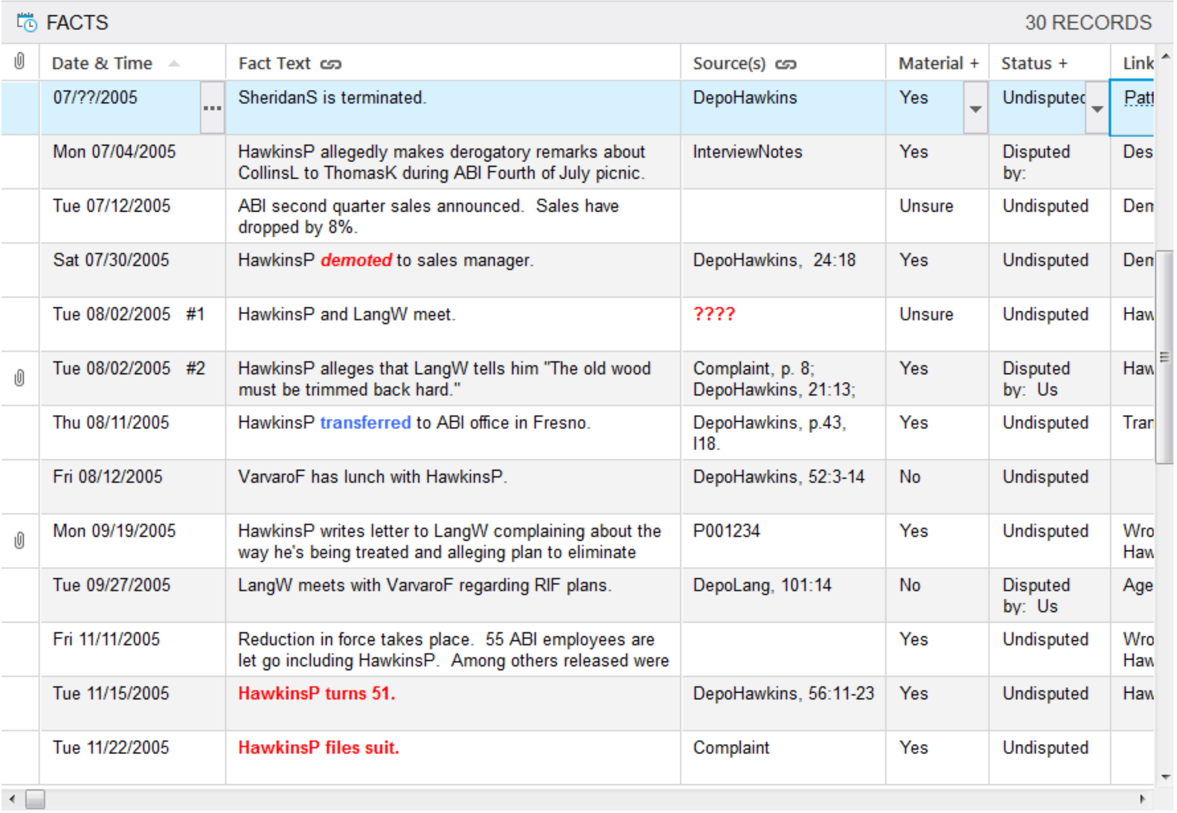
**Link Summary**

**Update History**

Fields display as rows listed alphabetically. Click on the bars at the bottom of the Detail window to view the fields for that type: Trait, Evaluation, # (Link Summary), and Update History. You can enter and update record information in detail dialog boxes just as you would in a spreadsheet.

## List dialog boxes

List dialog boxes, like spreadsheets, display some of the fields for a case record or element, but not all. List dialog boxes display fields as columns and can be customized the same as you would in spreadsheet view. Fields in a list dialog box are for reference and are read-only. You can print or export information in a list dialog box as needed. Double-click in a # field to open a list dialog box.



FACTS

30 RECORDS

| 📎 | Date & Time | Fact Text | Source(s) | Material + | Status + | Link |
|---|---|---|---|---|---|---|
| | 07/??/2005 | SheridanS is terminated. | DepoHawkins | Yes | Undisputec | Patt |
| | Mon 07/04/2005 | HawkinsP allegedly makes derogatory remarks about CollinsL to ThomasK during ABI Fourth of July picnic. | InterviewNotes | Yes | Disputed by: | Des |
| | Tue 07/12/2005 | ABI second quarter sales announced. Sales have dropped by 8%. | | Unsure | Undisputed | Den |
| | Sat 07/30/2005 | HawkinsP ***demoted*** to sales manager. | DepoHawkins, 24:18 | Yes | Undisputed | Den |
| | Tue 08/02/2005 #1 | HawkinsP and LangW meet. | ???? | Unsure | Undisputed | Haw |
| 📎 | Tue 08/02/2005 #2 | HawkinsP alleges that LangW tells him "The old wood must be trimmed back hard." | Complaint, p. 8;<br>DepoHawkins, 21:13; | Yes | Disputed by: Us | Haw |
| | Thu 08/11/2005 | HawkinsP **transferred** to ABI office in Fresno. | DepoHawkins, p.43, l18. | Yes | Undisputed | Trar |
| | Fri 08/12/2005 | VarvaroF has lunch with HawkinsP. | DepoHawkins, 52:3-14 | No | Undisputed | |
| 📎 | Mon 09/19/2005 | HawkinsP writes letter to LangW complaining about the way he's being treated and alleging plan to eliminate | P001234 | Yes | Undisputed | Wro<br>Haw |
| | Tue 09/27/2005 | LangW meets with VarvaroF regarding RIF plans. | DepoLang, 101:14 | No | Disputed by: Us | Age |
| | Fri 11/11/2005 | Reduction in force takes place. 55 ABI employees are let go including HawkinsP. Among others released were | | Yes | Undisputed | Wro<br>Haw |
| | Tue 11/15/2005 | **HawkinsP turns 51.** | DepoHawkins, 56:11-23 | Yes | Undisputed | Haw |
| | Tue 11/22/2005 | **HawkinsP files suit.** | Complaint | Yes | Undisputed | |

Related Topics

About fields

### *Inserting/hiding fields*

When you insert hidden fields into a spreadsheet, they display to the left of the selected field. Inserted fields display for your personal view only. You can insert multiple fields at a time. Fields will insert to the left of the selected field.

Hiding fields in a spreadsheet prepare a spreadsheet view for printing reports and allows you to focus on key content for particular case analysis.

> If you insert or create new fields into a spreadsheet before users are added to the case, users are able to view them when they log into a case if their views and searches were created off a user who can also view those fields.

### ⊟ To insert a field into a spreadsheet

1. On the **View** ribbon, in the **Case Shortcuts** group, click on the spreadsheet (icon) you want to use.

2. In the **Current View** group, click **Field**, and then click **Insert Fields**.

3. In the **Select Field(s) to Insert** box, select the check box for the field(s) you want to add to the spreadsheet and click **OK**.

   Inserted fields display to the left of the selected field.

### ⊟ To hide a field in a spreadsheet

Right-click on the header of the field you want to hide and select **Hide Field**.

The field remains hidden from your view until you choose to insert it again into the spreadsheet.

Related Topics

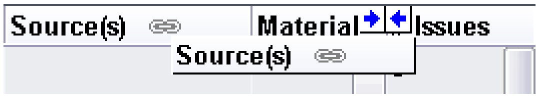
About fields
Moving fields
Creating spreadsheet views

## *Moving fields*

CaseMap spreadsheet can easily be organized to display fields in the order in which you want to view them or how you want information to print for a report.

### ⊟ To move fields in a spreadsheet

1. Click on the field header of the field you want to move and drag it to the right of the field where you want it to display.

   Blue arrows display between the field headers where you will place the field.

2. Release the mouse button and the new field displays in the selected location.

Related Topics

About fields

Inserting/hiding fields
Creating spreadsheet views

### *Creating custom fields*

CaseMap spreadsheets include numerous pre-built fields designed to capture all of the data you want to organize in many cases. However, you can create custom fields to capture specific information not addressed in default fields.

Custom fields work in the program just like the default fields:

- Custom fields display in spreadsheet views and in detail dialog boxes.
- Can be used to filter and tag spreadsheet data.
- Print on reports as long as they are visible in spreadsheet views.

You can create multiple fields types, including:

- Check box
- Date
- Description
- Evaluation
  For detailed information on creating and using Evaluation fields, see: Evaluation fields.
- Fixed lists
- Open-ended lists
- Numeric
- Text

Creating custom fields is an exclusive process. All other users need to log out of the case while this process occurs. If you want other users to access a custom field, it is best to create the custom field in the case before users are added to it. Otherwise, users will need to insert the custom field in their own spreadsheet view.

We recommend that you do not rename or copy an existing field to create a custom field. We recommend that you create a custom field and ensure that you select the proper field type for it.

If you are using CaseMap Server and have a SQL case open, you may not have permissions granted for creating and deleting spreadsheet fields. If so, these features will be disabled or grayed out in the Select Field(s) to Insert dialog box.

If your industry requires that you use symbols as part of your data entry, you could create a custom field to accommodate that need. See Learn about inserting symbols.

⊟ **To review the custom fields checklist**

Reference the following Creating New Fields checklist to brainstorm considerations when designing a custom field.

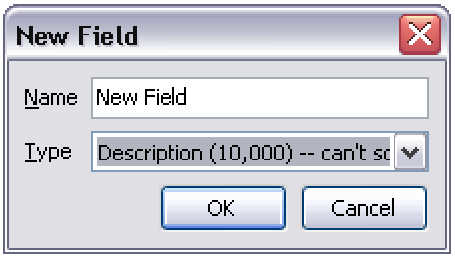
**Checklist: Creating New Fields**

| | **Task** |
|---|---|
| ☐ | What is the field name? |
| ☐ | What data goes into it? |
| ☐ | If the field values are data entry: fixed list or open-ended list? |
| ☐ | Does the field data need to link to other fields? |
| ☐ | How many users need to access it? |
| ☐ | Should the field data be searchable? |
| ☐ | Should the field data print on reports? |

### To create custom fields

1. In the **Case Shortcuts** pane, click on the spreadsheet icon you want to use.
2. Click on the field header and then click **Insert Fields**.

   The inserted field displays to the left of the selected field.
3. In the **Select Field(s) to Insert** box, click **New**.
4. In the **New Field** box, type in a name for the field in the **Name** field.

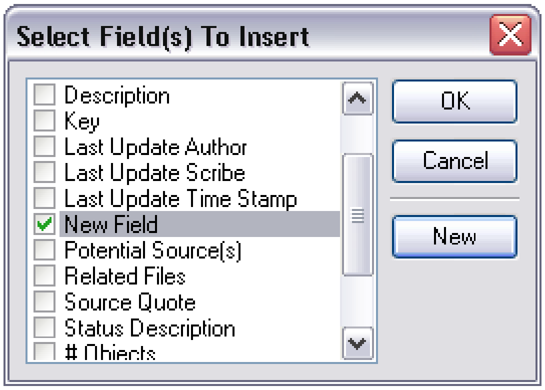


Name: New Field

Type: Description (10,000) -- can't sc

5. In the **Type** list, click on the field type, then click **OK**.

   The new field now displays in the **Select Field(s) to Insert** dialog box.


Select Field(s) To Insert
☐ Description
☐ Key
☐ Last Update Author
☐ Last Update Scribe
☐ Last Update Time Stamp
☑ New Field
☐ Potential Source(s)
☐ Related Files
☐ Source Quote
☐ Status Description
☐ # Objects
OK
Cancel
New

6. Click **OK** to insert this field into the spreadsheet view.

You can also create new fields by clicking on a field header and selecting Field Properties. In the Field Properties dialog box, click the Add New Field button at the top right. Or, you can click on a field header and click Insert, then click the New button and select the field type you need.

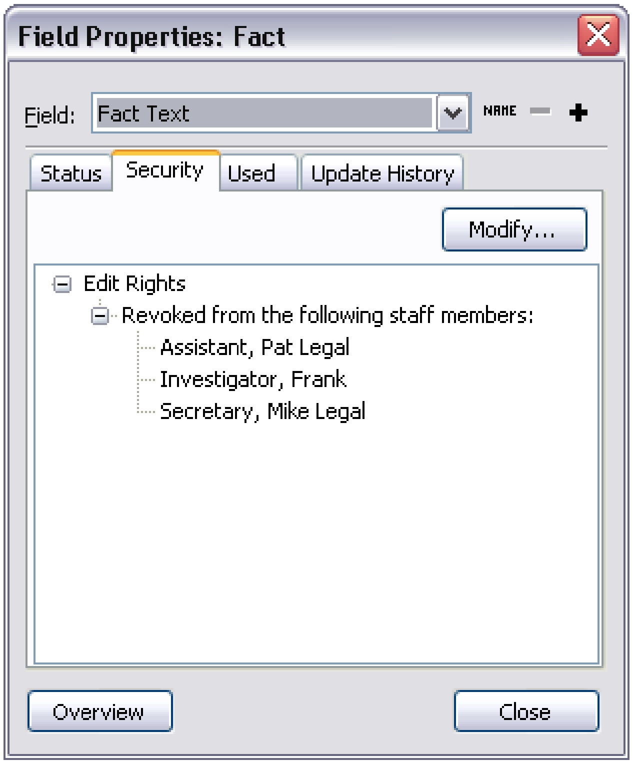
Instead of creating custom fields in the All Objects spreadsheet, it's best to create the field in the specific object spreadsheet, like Persons. Remember to review spreadsheet fields and the Select Field(s) to Insert dialog box to ensure the field does not already exist.

Related Topics

About fields
Converting open-ended lists to fixed lists
About evaluation tools
Changing field values
Renaming fields
Deleting fields

### *Applying field security*

You can apply security at the field level if you need to limit access to one or more staff members.



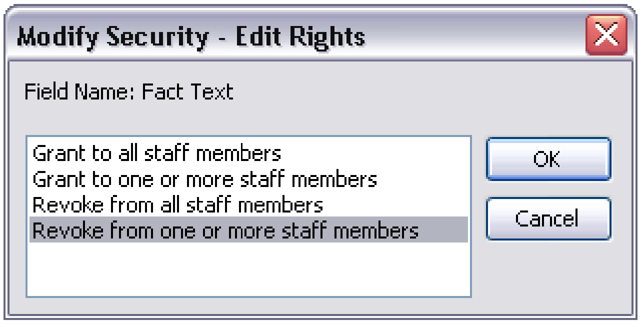
Field Properties: Fact

Field: Fact Text

Edit Rights
  Revoked from the following staff members:
    Assistant, Pat Legal
    Investigator, Frank
    Secretary, Mike Legal

### To apply field security

1. Click on the field header for the field you want to apply security to and click **Field Properties**.
2. In the **Field Properties** box, click on the **Security** tab.
3. Click on the **Modify** button.
4. In the **Modify Security** box, select the **Revoke from one or more staff members** and click **OK**.



Modify Security - Edit Rights

Field Name: Fact Text

Grant to all staff members
Grant to one or more staff members
Revoke from all staff members
Revoke from one or more staff members

5. Select the check box for each user that you do not want to have editing privileges, then click **OK**.
6. In the message box to revoke edit rights for selected users, click **OK**.

Notice that selected users now display as having revoked editing privileges for this field.

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

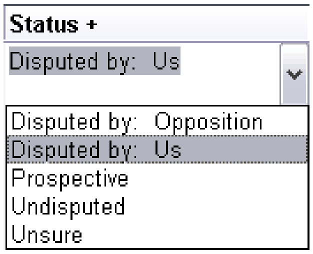
Related Topics

About fields
Creating custom fields
Changing field values
Verifying field use and history

### *Converting open-ended lists to fixed lists*

Open-ended list fields display a plus sign + in the field header. Fixed lists do not display a plus sign in the field header, but still allow users to select or add field values in drop-down lists. If you created an open-ended list and now want the field values to be fixed selections, you can convert it to a fixed list field. Doing so will keep field selections succinct and case users from creating too many values.

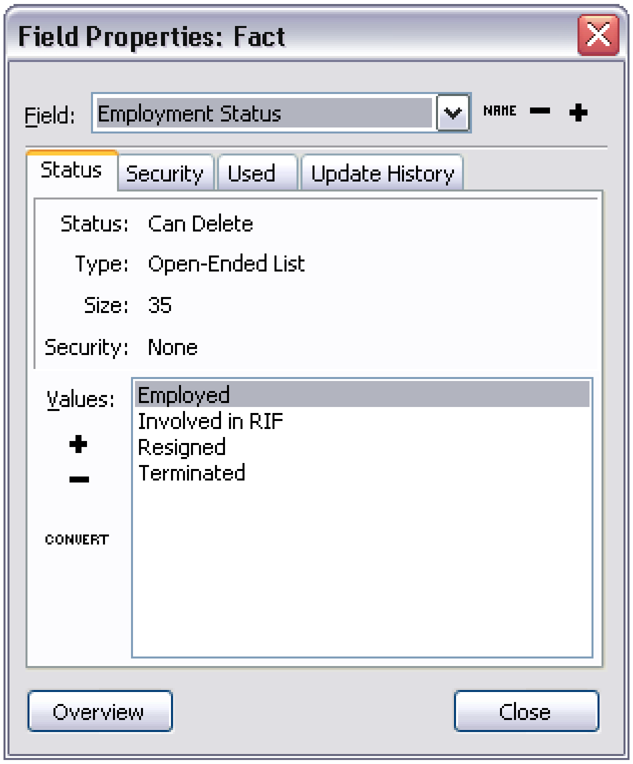
You can still add or edit values in custom fixed list fields (except CaseMap's fixed list fields). To do so, simply convert the fixed list field back to an open-ended field list to make the change, then convert it back to a fixed list field.



#### ⊟ To convert an open-ended list into a fixed list

1. Click on the field header for the open-ended list you want to convert and then click **Field Properties**.

2. In the **Field Properties** box, click on the **Status** tab.


Field Properties: Fact
Field:
NAME
Status
Security
Used
Update History
Values:
CONVERT
Overview
Close

Field: Employment Status

Status: Can Delete
Type: Open-Ended List
Size: 35
Security: None

Values:
Employed
Involved in RIF
Resigned
Terminated

3. Edit the field values in the **Values** list by clicking the **Add New Value** ✚ or **Delete Selected Value** ▬ buttons.

   Any records that contain a field value that you remove should be noted so you can update the record status with a new value in the list.

4. Click the **Convert** button CONVERT to change the field type, and then click **Yes**.

   Notice that the Type designation in the Status tab changed from Open Ended to Fixed List.

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

   Notice that the field header no longer displays a plus sign.

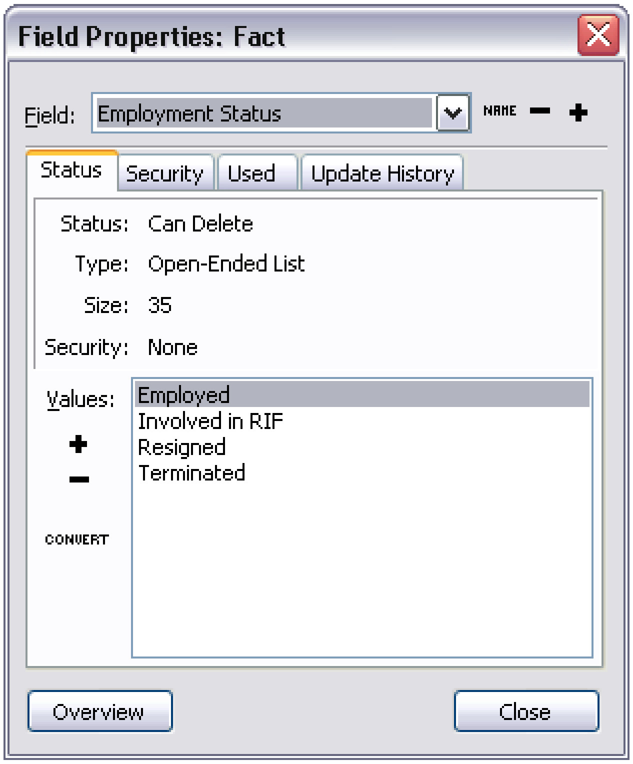
Related Topics

[About fields](#)
[Creating custom fields](#)
[Changing field values](#)

### *Changing field values*

You can still add or edit values for fields, except for CaseMap's fixed list fields.

Please make note of any record that contains a field value you want to remove. You may need to update the field property status with a new value to replace the one removed. If the field value you want to remove is already selected for one or more records, you must first remove it from each record in the case where it is found.



Field: Employment Status

Status: Can Delete

Type: Open-Ended List

Size: 35

Security: None

Values:
Employed
Involved in RIF
Resigned
Terminated

### ⊟ To change a field's values

1. Click on the field header for the field you want to modify and then click **Field Properties**.
2. In the **Field Properties** box, click on the **Status** tab.
3. Edit the field values in the **Values** list by clicking the **Add New Value** + or **Delete Selected Value** − buttons.
4. If it is a description field, click **Increase Field Size** to change the maximum number of characters this field can hold.
5. Click **Close** to save your changes.

Related Topics

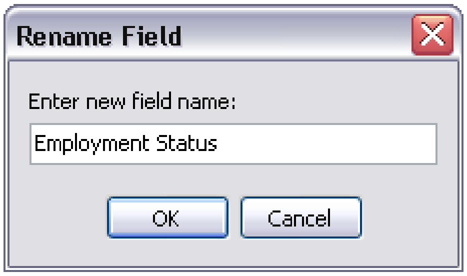
[About fields](#)
[Creating custom fields](#)
[Applying field security](#)
[Converting open-ended lists to fixed lists](#)
[Verifying field use and history](#)

### *Renaming fields*

You can rename any field in a case, including CaseMap's predefined fields. If you are going to change a field name once case analysis has started, you should alert case staff beforehand to ensure that everyone understands the name change and the correct use of the field. The updated field name displays the next time a user logs into the case.

#### ⊟ To rename a field

1. Click on the field header for the field you want to modify and then click **Rename** Field.
2. In the **Rename Field** box, type in the new field name.



Employment Status

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

   The field name is now updated in your spreadsheet view.

Related Topics

[About fields](#)
[Creating custom fields](#)
[Deleting fields](#)

### *Deleting fields*

If you need to remove a field that is no longer relevant, you can permanently delete it from a case. You can delete any fields you create for a case. You cannot delete the default set of fields that CaseMap provides for each case, but you can hide them from spreadsheet view. You also cannot delete field that are currently used in a filter or search.

If you want to save any data entered in the field, you may want to export it to a Microsoft® Excel file and save it for reference. Once a field is deleted, all data stored in it is destroyed.

If you are trying to delete a field in a master case that has an outstanding replica case that contains the same field, you will not be able to delete it. If the field was created in the master case after the replica was created, then you will be able to delete the field.

> If you are using CaseMap Server and have a SQL case open, you may not have permissions granted for creating and deleting spreadsheet fields. If so, these features will be disabled or grayed out in the Select Field(s) to Insert dialog box.

#### ⊟ To delete fields

1. Click on the field header for the field you want to delete and then click **Field Properties**.
2. In the **Field** listing, click on the field you want to delete and click the **Delete Field** button −.
3. In the message box, click **Yes** twice to confirm deleting the field.
4. In the message box indicating that the field was deleted, click **OK**.

   This field is now deleted from the case and no longer displays in the spreadsheet view or any field listing.
5. Click **Close** to continue working in CaseMap.

Related Topics

About fields
Creating custom fields
Renaming fields

### *Verifying field use and history*

CaseMap tracks how, where, and when fields are used so you can reference this information easily.

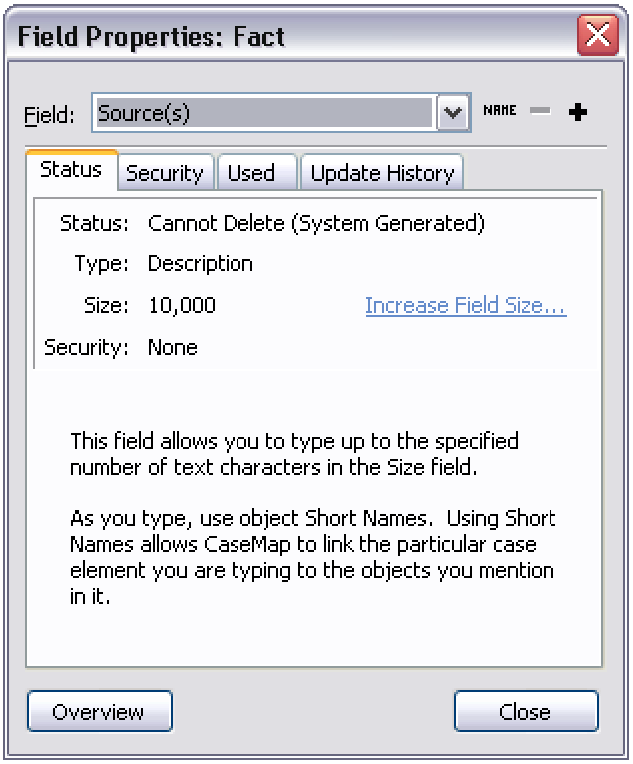
Any time you want to check a field's use or inclusion in a spreadsheet or report, review the Used tab in the Field Properties box. If you need to track when field data was last updated, review the Update History tab in the Field Properties box.

***Field use and history updates include the following:***

- Spreadsheet views and reports that include the field
- Who create and last updated the field with date/time stamps
- Previous names for the field

### ⊟ To verify field use and history

1. Click on a field header and click **Field Properties**.
2. Click on the **Used** tab to review how often a field is used in a view, search, filter in a # field, or how it is used in a ReportBook.



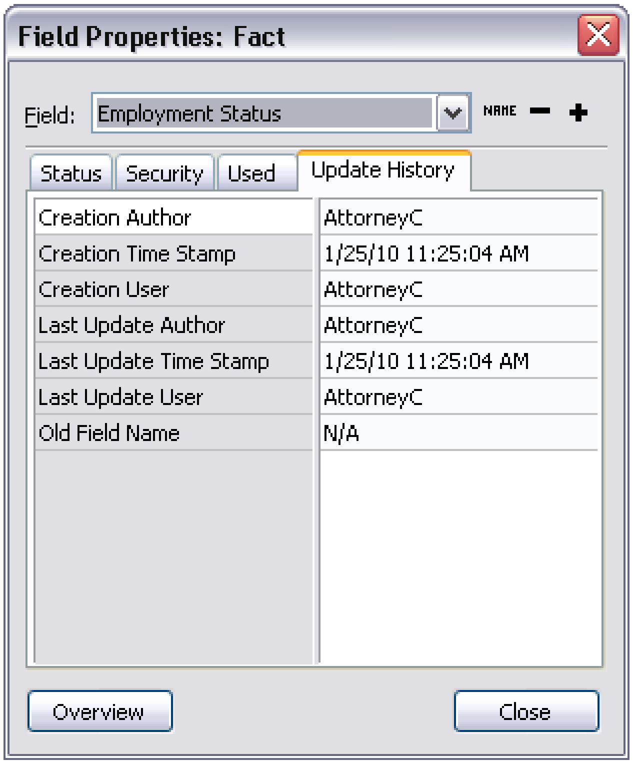
Field: Source(s)

Status: Cannot Delete (System Generated)
Type: Description
Size: 10,000
Security: None

This field allows you to type up to the specified number of text characters in the Size field.

As you type, use object Short Names. Using Short Names allows CaseMap to link the particular case element you are typing to the objects you mention in it.

3. Click on the **Update History** tab to review information on when the field was created, who created it, when it was last updated, and any previous field names, etc.


Field Properties: Fact
Field:
Employment Status
NAME
Status
Security
Used
Update History
Overview
Close

| | |
|---|---|
| Creation Author | AttorneyC |
| Creation Time Stamp | 1/25/10 11:25:04 AM |
| Creation User | AttorneyC |
| Last Update Author | AttorneyC |
| Last Update Time Stamp | 1/25/10 11:25:04 AM |
| Last Update User | AttorneyC |
| Old Field Name | N/A |

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

Related Topics

About fields
Applying field security
Creating custom fields
Changing field values
Reviewing the Use History spreadsheet

## Viewing spreadsheet field lists

### *Issues spreadsheet field list*

The following table provides a listing of the CaseMap fields available for use in the Issues spreadsheet. You may also create custom fields to track and store information as needed.

| Issues Spreadsheet Field Listing | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| **Trait Fields** | | |
| Burden of Proof+ | The level of proof (e.g., preponderance) associated with the issue. | Select an existing value from the list or add an additional one. If the issue is not a legal issue (e.g., plaintiff is greedy), select Not Applicable. |
| Description | A description of the issue. | Type up to 10,000 characters of text. To ensure consistency, use short names. |
| Full Name | The name of the issue. | Type up to 255 characters. CaseMap uses the issue's full name to generate a default issue short name. |
| Jury Instruction | The text of the proposed or actual jury instruction for the issue. | Type up to 10,000 characters of text. |
| Legal Flag | The classification of an issue as legal or non-legal (e.g., the race issue in the OJ Simpson case would be an example of a non-legal issue). | Select or clear the check box. |
| Related Files | Files that have been manually linked to a record in the spreadsheet. This field is only used in rare instances when it's deemed absolutely necessary to have additional files linked to a record.<br>Tip: Normally, the Linked File field is used to link a file to a record, especially when using the Send to CaseMap feature. Documents that have been linked into CaseMap can be linked to records in other spreadsheets by using the document short name in any description field that displays the chain-link symbol in the field title. | Read-only. Click the Ellipsis button in this field to add or remove related files.<br>Use with Caution: Files added to this field through the Related Files dialog box have to be individually re-linked if the files are moved. Files linked to this field will not be included in search results or reports. Related files will not be linked to other spreadsheets. |
| Short Name | The issue's short name. To automatically link facts, objects, and questions to issues, you must refer to issues by their short names as you enter information. | CaseMap creates a default short name for you based on the issue's full name. You can change this default name at any time, as often as you want. Type a single word up to 30 characters. |

| Issues Spreadsheet Field Listing | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| Subject of MSJ Flag | An indication of whether the issue is likely to be included in a Motion for Summary Judgment. | Select a value from the list (e.g., Yes, No, Not Applicable). |
| **Evaluation Fields** | | |
| Key | An indication of whether an issue is particularly important. | To indicate an issue is key, select the check box.<br>Tip: You can check the box by double-clicking it or by pressing the SPACEBAR. |
| **# Fields** | | |
| # Authorities | The number of research authorities linked to the issue. | Read-only. CaseMap counts the links for you. Double-click to display a list of the research authorities to the issue. |
| # Demonstrative Evidence | The number of demonstrative evidence ideas linked to the issue. | Read-only. CaseMap counts the links for you. Double-click to display a list of the demonstrative evidence ideas linked to the issue. |
| # Documents | The number of documents linked to the issue. | Read-only. CaseMap counts the links for you. Double-click to display a list of the documents linked to the issue. |
| # Extracts | The number of authority extracts linked to the issue. | Read-only. CaseMap counts the links for you. Double-click to display a list of authority extracts linked to the issue. |
| # Facts | The number of facts linked to the issue.<br>* If the number in the parent issue is larger than the tally of the sub-issues, it means that one or more facts has been linked to the parent issue but not linked to any sub-issues. | Read only. CaseMap counts the links for you. Double-click to display a list of the facts linked to the issue. |
| # Facts Disputed by Opposition | The number of facts linked to the issue with a status of: Disputed by Opposition. | Read-only. CaseMap counts the links for you. Double-click to display a list of the disputed facts by us linked to the issue. |

| Issues Spreadsheet Field Listing | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| # Facts Disputed by Us | The number of facts linked to the issue with a status of: Disputed by Us. | Read-only. CaseMap counts the links for you. Double-click to display a list of the disputed facts by us linked to the issue. |
| # Key Facts | The number of key facts linked to the issue. | Read-only. CaseMap counts the links for you. Double-click to display a list of the key facts linked to the issue. |
| # Objects | The number of questions linked to the issue. | Read-only. CaseMap counts the links for you. Double-click to display a list of the persons, organizations, documents, and other objects types linked to the issue. |
| # Open Questions | The number of open questions linked to the issue. Open questions have an answer status of Unaddressed or In Progress. | Read-only. CaseMap counts the links for you. Double-click to display a list of the open questions linked to the issue. |
| # Persons | The number of persons linked to the issue. | Read-only. CaseMap counts the links for you. Double-click to display a list of the persons linked to the issue. |
| # Prospective Facts | The number of prospective facts linked to the issue. | Read-only. CaseMap counts the links for you. Double-click to display a list of the prospective facts linked to the issue. |
| # Questions | The number of questions linked to the issue. | Read-only. CaseMap counts the links for you. Double-click to display a list of the questions linked to the issue. |
| # Undisputed Facts | The number of undisputed facts linked to the issue. | Read-only. CaseMap counts the links for you. Double-click to display a list of the undisputed facts linked to the issue. |
| **Update History Fields** | | |
| Creation Author | The short name of the author who authorized the issue's entry. | Read-only. CaseMap enters the author's short name. |
| Creation Scribe | The short name of the scribe who entered the issue on behalf of the | Read-only. CaseMap enters the scribe's short name. If an author |

**Issues Spreadsheet Field Listing**

| Field Name | What it Displays | Using It |
|---|---|---|
| | author. | acts as a scribe (i.e., enters the issues in CaseMap), the author's name displays in this field. |
| Creation Time Stamp | The date and time when the issue record was entered. | Read-only. CaseMap enters the date and time for you. |
| Last Update Author | The short name of the author who requested the last update to the issue. | Read-only. CaseMap enters the author's short name for you. |
| Last Update Scribe | The short name of the scribe who made the last update to the issue. | Read-only. CaseMap enters the scribe's short name for you. If an author acts as a scribe (i.e., enters the updates), the author's name displays in this field. |
| Last Update Time Stamp | The date and time when the issues was last updated. | Read-only. CaseMap enters the date and time for you. |

Related Topics

- About fields
- Creating custom fields
- Facts spreadsheet field listing
- Objects spreadsheet field listing
- Questions spreadsheet field listing
- Research spreadsheets field listing

### *Facts spreadsheet field list*

The following table provides a listing of the CaseMap fields available for use in the Facts spreadsheet. You may also create custom fields to track and store information as needed.

| Facts Spreadsheet Field Listing | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| **Trait Fields** | | |
| Date and Time | The date and time when the fact occurred. | Type a date in this field or use the Date Stamper. You can enter fuzzy dates such as 07/??/97, and use date status indicators such as <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. | Type up to 10,000 characters of text. To ensure consistency, use object short names. |
| Linked Issues | The issues linked to the fact. | Type the short name of the issues linked to the fact. you can link as many issues as you want to a singe fact -- just keep typing the issue short name. |
| Potential Source(s) | The potential source(s) for a fact (e.g., the short name of a witness you hope will give you this fact during his or her deposition). | Type up to 10,000 characters describing the potential sources of the fact. To ensure consistency, use object short names.<br>Tip: To make the most of CaseMap, list the facts you're hoping to develop before having definitive sources for them. |
| Related Files | Files that have been manually linked to a record in the spreadsheet. This field is only used in rare instances when it's deemed absolutely necessary to have additional files linked to a record.<br>Tip: Normally, the Linked File field is used to link a file to a record, especially when using the Send to CaseMap feature. Documents that have been linked into CaseMap can be linked to records in other spreadsheets by using the document short name in any description field that displays the chain-link symbol in the field title. | Read-only. Click the Ellipsis button in this field to add or remove related files.<br>Use with Caution: Files added to this field through the Related Files dialog box have to be individually re-linked if the files are moved. Files linked to this field will not be included in search results or reports. Related files will not be linked to other spreadsheets. |

| Facts Spreadsheet Field Listing | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| Source(s) | The definitive sources of the fact and their location (e.g., ArndtDepo, Pg. 112, Line 14). | Type up to 10,000 characters describing the sources of the fact. To ensure consistency, use object short names. |
| Source Quote | The text sent to CaseMap from an external application. | Holds up to 10,000 characters of a source quote from content from another program. To ensure consistency, use object short names. |
| Status+ | Whether the fact is disputed and by which party. You can also use this field to indicate that a fact is prospective (i.e., one for which you hope to develop sources). | Select an existing value such as Undisputed, Disputed by Opposition, or Prospective. If the value you want is not listed, add a new value to the list. |
| Status Description | If the fact is disputed, a description of why it is. | Type up to 10,000 characters of text. To ensure consistency, use object short names. |
| **Evaluation Fields** | | |
| Key | An indication of whether a fact is particularly important. | To indicate an issue is key, select the check box.<br>Tip: You can check the box by double-clicking it or by pressing the SPACEBAR. |
| **# Fields** | | |
| # Issues | The number of issues linked to the fact. | Read-only. CaseMap counts the links for you. Double-click to display a list of the issues linked to the fact. |
| # Objects | The number of objects mentioned by short name on the Facts spreadsheet. | Read-only. CaseMap counts the links for you. Double-click to display a list of the objects linked to the fact. |
| # Open Questions | The number of open questions linked to the fact. Open questions have an answer status of Unaddressed or In Progress. | Read-only. CaseMap counts the links for you. Double-click to display a list of the open questions linked to the fact. |
| # Questions | The number of questions linked to the fact. | Read-only. CaseMap counts the links for you. Double-click to |

**Facts Spreadsheet Field Listing**

| Field Name | What it Displays | Using It |
|---|---|---|
| | | display a list of all questions linked to the fact. |
| # Source(s) | The number of objects cited by short name in the Source(s) field. | Read-only. CaseMap counts the links for you. Double-click to display a list of the objects acting as sources. |
| **Update History Fields** | | |
| Creation Author | The short name of the author who authorized the fact's entry. | Read-only. CaseMap enters the author's short name. |
| Creation Scribe | The short name of the scribe who entered the fact. | Read-only. CaseMap enters the scribe's short name. If an author acts as a scribe (i.e., enters the fact in CaseMap), the author's name appears in this field. |
| Creation Time Stamp | The date and time when the fact record was entered. | Read-only. CaseMap enters the date and time for you. |
| Last Update Author | The short name of the author who requested the last update to the fact. | Read-only. CaseMap enters the author's short name for you. |
| Last Update Scribe | The short name of the scribe who made the last update to the fact. | Read-only. CaseMap enters the scribe's short name for you. If an author acts as a scribe (i.e., enters the updates), the author's name displays in this field. |
| Last Update Time Stamp | The date and time when the fact was last updated. | Read-only. CaseMap enters the date and time for you. |

Related Topics

About fields
Creating custom fields
Analyzing and linking facts
Issues spreadsheet field listing
Objects spreadsheet field listing
Questions spreadsheet field listing
Research spreadsheets field listing

### *Objects spreadsheet field list*

The following table provides a listing of the CaseMap fields available for use in the Objects spreadsheet. You may also create custom fields to track and store information as needed.

***There are two tables for the Objects spreadsheets:***

- Fields common to all object types
- Fields unique to specific object types (sub-level spreadsheets)

#### Fields common to all object types

Fields included in the following table are commonly used in the All Objects spreadsheet and sub-level object spreadsheets.

**Objects Spreadsheet Field Listing — Common**

| Field Name | What it Displays | Using It |
|---|---|---|
| **Trait Fields** | | |
| Description | A description of the object. | Type up to 10,000 characters of text. To ensure consistency, refer to persons, organizations, documents, and other objects by their short names. |
| Full Name | The name of the object. | Type up to 255 characters. CaseMap uses the object's full name in conjunction with its object type to generate a default object short name. |
| Linked File | The name of the viewer associated with the linked file and the ID of the file or the path to it. | Click to display the Linked File Properties box that you use to set up file viewers. Right-click to display a shortcut menu that allows you to view the file and specify the viewer you will use to display the file. |
| Related Files | Files that have been manually linked to a record in the spreadsheet. This field is only used in rare instances when it's deemed absolutely necessary to have additional files linked to a record.<br>Tip: Normally, the Linked File | Read-only. Click the Ellipsis button in this field to add or remove related files.<br>Use with Caution: Files added to this field through the Related Files dialog box have to be individually re-linked if the files are moved. Files linked to this field will not be included in search |

| Objects Spreadsheet Field Listing — Common | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| | field is used to link a file to a record, especially when using the Send to CaseMap feature. Documents that have been linked into CaseMap can be linked to records in other spreadsheets by using the document short name in any description field that displays the chain-link symbol in the field title. | results or reports. Related files will not be linked to other spreadsheets. |
| Role in Case | A description of the connection between the object and the case (e.g., 'Eyewitness to the accident' or 'First officer on the scene'. | Type up to 10,000 characters of text. |
| Object Type | An indication as to whether the object is a person, an organization, a document, another type of physical evidence, an event, a place, or some other type of thing. | Select the appropriate object type from the list. CaseMap uses the object's type in conjunction with its full name to generate a default object short name. |
| Short Name | The object's short name. To ensure consistency in your case information, refer to persons, organizations, documents, and other objects by their short names as you enter in CaseMap's description fields. | CaseMap creates default short names for you based on the object's full name and its object type. You can change this default name at any time, as often as you want. Type a single word of up to 30 characters. |
| **Evaluation Fields** | | |
| Eval by [author's initials] | A symbol indicating the author's evaluation of whether the issue weighs for or against us. | Select a value (e.g., For Us, Heavily Against Us, etc.) from the list. |
| Key | An indication of whether an object is particularly important. | To indicate an issue is key, select the check box.<br>Tip: You can check the box by double-clicking it or by pressing the SPACEBAR. |

| Objects Spreadsheet Field Listing — Common | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| **# Fields** | | |
| # Facts | The number of facts linked to the object. | Read-only. CaseMap counts the links for you. Double-click to display a list of the facts linked to the object. |
| # Issues | The number of issues linked to the object. | Read-only. CaseMap counts the links for you. Double-click to display a list of the issues linked to the object. |
| # Key Facts | The number of key facts linked to the object. | Read-only. CaseMap counts the links for you. Double-click to display a list of the key facts linked to the object. |
| # Open Questions | The number of open questions linked to the object. Open questions have an answer status of Unaddressed or In Progress. | Read-only. CaseMap counts the links for you. Double-click to display a list of the open questions linked to the object. |
| # Prospective Facts | The number of prospective facts linked to the issue. | Read-only. CaseMap counts the links for you. Double-click to display a list of the prospective facts linked to an issue. |
| # Sourced Facts | The number of facts being sourced from the object. | Read-only. CaseMap counts the links for you. Double-click to display a list of the facts being sourced from the object. |
| # Undisputed Facts | The number of undisputed facts linked to the object. | Read-only. CaseMap counts the links for you. Double-click to display a list of the undisputed facts linked to the object. |
| **Update History Fields** | | |
| Creation Author | The short name of the author who authorized the object's entry. | Read-only. CaseMap enters the author's short name. |
| Creation Scribe | The short name of the scribe who entered the object. | Read-only. CaseMap enters the scribe's short name. If an author acts as a scribe (i.e., enters the fact in CaseMap), the author's name appears in this field. |
| Creation Time | The date and time when the | Read-only. CaseMap enters the date |

**Objects Spreadsheet Field Listing — Common**

| Field Name | What it Displays | Using It |
|---|---|---|
| Stamp | object was entered. | and time for you. |
| Last Update Author | The short name of the author who requested the last update to the object. | Read-only. CaseMap enters the author's short name for you. |
| Last Update Scribe | The short name of the scribe who made the last update to the object. | Read-only. CaseMap enters the scribe's short name. If an author acts as a scribe (i.e., makes the physical updates), the author's name displays in this field. |
| Last Update Time Stamp | The date and time when the fact was last updated. | Read-only. CaseMap enters the date and time for you. |

## Fields common to unique object types

Fields included in the following table are unique to the sub-level object spreadsheets noted.

**Objects Spreadsheet Field Listing — Unique**

| Field Name | What it Displays | Using It |
|---|---|---|
| **Persons** | | |
| Addresses | The person's business, home, and other addresses. | Type up to 10,000 characters of text. |
| Address: Email | The person's email address. | Type up to 10,000 characters of text. |
| At Trial+ | Indicates if the person will appear at trial and the likely method of testimony. | Select an existing option from the list or, if the option you want is not listed, add a new value. |
| Calling Party+ | The name of the party that is calling the witness to testify. | Select a party from the list or, if the option you want is not listed, add a new value. |
| Counsel | The name of the counsel who represents the witness. | Type up to 10,000 characters of text. |
| Deposition Date | The date for which the deposition is scheduled or the date on which | Type a date directly or use the Date Stamper. This field supports |

| Objects Spreadsheet Field Listing — Unique | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| | the deposition was taken. | the use of fuzzy dates, such as 05/??/99. |
| Deposition Status + | Whether or not the person has been deposed. | Select an existing option from the list or, if the option you want is not listed, add a new value. |
| Gender | Whether the person is female or male. | Select Female or Male. The values in this field are fixed. It is is not an open-ended list. |
| Phone Numbers | The person's business, home, and other phone numbers. | Type up to 10,000 characters of text. |
| Title | The person's title. | Type up to 10,000 characters of text. |
| Works For+ | The name of the person and/or organization for which the person works. | Type up to 10,000 characters of text. To ensure consistency, refer to the persons and organizations by their short names. |
| **Documents** | | |
| Author+ | The name of the author(s) of the document. | Type up to 10,000 characters of text. To ensure consistency, refer to the persons and organizations by their short names. |
| Bates - Begin | The beginning Bates number associated with the document. | Type an alphanumeric value of up to 35 characters of text. |
| Bates - End | The ending Bates number associated with the document. | Type an alphanumeric value of up to 35 characters of text. |
| Copied To | The names of individuals receiving a copy (cc:) of the document. | Type up to 10,000 characters of text. To ensure consistency, refer to the persons and organizations by their short names. |
| Date | The date of the document. | Type a date directly or use the Date Stamper. This field supports the use of fuzzy dates such as 05/??/99. |
| Depo Ex. # | The deposition exhibit number of the document. | Type up to 35 characters of text. |

| Objects Spreadsheet Field Listing — Unique | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| Mentioned In | The names of individuals mentioned in the document. | Type up to 10,000 characters of text. To ensure consistency, refer to the persons and organizations by their short names. |
| Producing Party+ | The name of the party that produced the document. | Select an existing party from the list or, if the party you want is not listed, add a new value. |
| Recipient(s) | The names of the individuals who received the document. | Type up to 10,000 characters of text. To ensure consistency, refer to the persons and organizations by their short names. |
| Sent Via+ | Whether the letter or other type of document was sent by mail, overnight delivery service, or other option. | Select a method from the list, or if the method you are looking for is not listed, add a new value. |
| Trial Ex. # | The trial exhibit number of the document. | Type up to 35 characters of text. |
| **Physical Evidence** | | |
| Bates # | The range of Bates numbers, if any, associated with the piece of physical evidence. | Type a range of numbers using up to 35 characters of text. |
| Trial Ex. # | The trial exhibit number of the document. | Type up to 35 characters of text. |
| **Events** | | |
| Attendees | The names of individuals who attended the event. | Type up to 10,000 characters of text. To ensure consistency, refer to the persons and organizations by their short names. |
| Begin Date and Time | The date and time when the event began. | Type a date directly or use the Date Stamper. This field supports the use of fuzzy dates such as 05/??/99. |
| End Date and Time | The date and time when the event ended. | Type a date directly or use the Date Stamper. This field supports the use of fuzzy dates such as 05/??/99. |

| Objects Spreadsheet Field Listing — Unique | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| Location | The location of the event. | Type up to 10,000 characters of text. |
| **Organizations** | | |
| Address: Business | The organization's physical mail address. | Type up to 10,000 characters of text. |
| Address:Email | The organization's email address. | Type up to 10,000 characters of text. |
| Phone Numbers | The organization's phone number. | Type up to 10,000 characters of text. |
| **Pleadings** | | |
| Date | The date of the pleading. | 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 pleading (e.g., Complaint, Answer, Reply). | Select an existing value from the list of options or add a new one. |
| **Proceedings** | | |
| Attendees | The names of those attending the deposition. | Type up to 10,000 characters of text. To ensure consistency, refer to persons by their short names. |
| Date | The date of the proceeding. | Type a date directly or use the Date Stamper. This field supports the use of fuzzy dates such as 05/??/99. |
| Notice Date | Date of notice. | Type a date directly or use the Date Stamper. This field supports the use of fuzzy dates such as 05/??/99. |
| Subpoena Served | An indication of whether or not a subpoena has been served. | To indicate Yes, select the check box.<br>Tip: You can check the box by double-clicking it or by pressing the SPACEBAR. |

| Objects Spreadsheet Field Listing — Unique | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| Status+ | An indication of whether the proceeding has or has not been completed. | Select an existing value from the list of options or add a new one. |
| Type+ | An indication of the type of hearing (e.g., deposition, grand jury hearing, arraignment). | Select an existing value from the list of options or add a new one. |
| **Other Discovery** | | |
| 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 options or add a new one. |
| **Demonstrative Evidence** | | |
| Estimated Cost | An estimate of what it will cost to produce the visual. | Type a number up to 35 characters of text. |
| For Use By | The name of the individual(s) who will use the visual during trial or other proceeding. | Type up to 10,000 characters of text. To ensure consistency, refer to persons, organizations, documents, and other objects by their short names. |
| Mission Statement | An explanation of the intended impact of the visual. What should the judge think after seeing this visual? | Type up to 10,000 characters of text. To ensure consistency, refer to persons, organizations, documents, and other objects by their short names. |
| Production Status + | An indication of how far along this visual is in the production process. | Select an existing value from the list of options or add a new one. |

**Objects Spreadsheet Field Listing — Unique**

| Field Name | What it Displays | Using It |
|---|---|---|
| Trial Ex. # | The trial exhibit number of the visual. | Type up to 35 characters of text. |
| Type+ | The type of visual (e.g., blow-up, chart, model, video). | Select an existing value from the list of options or add a new one. |

Related Topics

- About fields
- Creating custom fields
- Analyzing and linking objects
- Issues spreadsheet field listing
- Facts spreadsheet field listing
- Questions spreadsheet field listing
- Research spreadsheets field listing

### *Questions spreadsheet field list*

The following table provides a listing of the CaseMap fields available for use in the Questions spreadsheet. You may also create custom fields to track and store information as needed.

**Questions Spreadsheet Field Listing**

| Field Name | What it Displays | Using It |
|---|---|---|
| **Trait Fields** | | |
| Answer | The answer to the question (if one has been entered). | Type up to 10,000 characters of text. To ensure consistency, use short names. |
| Answer Status | The status of the progress in answering the question. | When you enter a question, CaseMap defaults the value of this field to Unaddressed. When you start to work on the question, update its status to In Progress, |

**Questions Spreadsheet Field Listing**

| Field Name | What it Displays | Using It |
|---|---|---|
| | | and then to Answered. |
| Answered On | The date and time when the question was answered. | Read-only. CaseMap enters the date and time when the valued of the question's Answer Status field is changed to Answered. |
| Assigned To+ | The name of the case user responsible for find the answer to the question. | Select from a list of case users or add a new value. |
| Category+ | The type of element (fact, object, or issue) that the question is about or a category you have created. | If you add a question from one of CaseMap's other spreadsheets, CaseMap defaults this field to that element type. If you add a question in the Questions spreadsheet, you can select an existing category from the Category+ list or add a new one. |
| Due Date | The date by which the question should be answered. | Type in the due date directly or use the Date Stamper. |
| Linked Elements | If the question is linked to a fact, object, or issue, the field displays the linked item. Also, if objects are mentioned by short name in the Question Text field, the short names of these objects display in this field behind Objects Mentioned. | Type the short name of the issues linked to the question. You can link as many issues as you want to a single question -- just keep typing issue short names. |
| Linked Issues | The short names of issues linked to the question. | Type the short names of the issues linked to the question. You can link as many issues as you want to a single question -- just keep typing issue short names. |
| Other Staff Thoughts | Thoughts about the answer to the question added by staff members other than the individual assigned to discover the answer. | Type up to 10,000 characters of text. To ensure consistency, use short names. |
| Question For | The names of witnesses and other persons to whom you would like to ask the question. | Type up to 10,000 characters of text. To ensure consistency, use short names. |
| Related Files | Files that have been manually linked to a record in the spreadsheet. This field is only used | Read-only. Click the Ellipsis button in this field to add or remove related files. |

| Questions Spreadsheet Field Listing | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| | in rare instances when it's deemed absolutely necessary to have additional files linked to a record.<br>Tip: Normally, the Linked File field is used to link a file to a record, especially when using the Send to CaseMap feature. Documents that have been linked into CaseMap can be linked to records in other spreadsheets by using the document short name in any description field that displays the chain-link symbol in the field title. | Use with Caution: Files added to this field through the Related Files dialog box have to be individually re-linked if the files are moved. Files linked to this field will not be included in search results or reports. Related files will not be linked to other spreadsheets. |
| Research Notes | Note you make as you work on the answer to the question. | Type up to 10,000 characters of text. To ensure consistency, use short names. |
| **Evaluation Fields** | | |
| Criticality | An indication of how important an authority is deemed to be. | Select a value (e.g., A - Extremely Critical) from the list CaseMap provides. |
| **Update History Fields** | | |
| Creation Author | The short name of the author who authorized the question's entry. | Read-only. CaseMap enters the author's short name. |
| Creation Scribe | The short name of the scribe who entered the question on behalf of the author. | Read-only. CaseMap enters the scribe's short name. If an author acts as a scribe (i.e., enters the fact in CaseMap), the author's name appears in this field. |
| Creation Time Stamp | The date and time when the question was entered. | Read-only. CaseMap enters the date and time for you. |
| Last Update Author | The short name of the author who requested the last update to the question. | Read-only. CaseMap enters the author's short name for you. |
| Last Update Scribe | The short name of the scribe who made the last update to the question. | Read-only. CaseMap enters the scribe's short name for you. If an author acts as a scribe (i.e., enters the updates), the author's name displays in this field. |

**Questions Spreadsheet Field Listing**

| Field Name | What it Displays | Using It |
|---|---|---|
| Last Update Time Stamp | The date and time when the question was last updated. | Read-only. CaseMap enters the date and time for you. |

Related Topics

- About fields
- Creating custom fields
- Analyzing and linking questions
- Issues spreadsheet field listing
- Facts spreadsheet field listing
- Objects spreadsheet field listings
- Research spreadsheets field listing

### *Research spreadsheets field list*

The following table provides a listing of the CaseMap fields available for use in the Research spreadsheets. You may also create custom fields to track and store information as needed.

***There are two tables for the Research spreadsheets:***

- Authorities
- Extracts from Authorities

The Research - Authorities and Extracts spreadsheet combines fields from the other two spreadsheets, so a separate table listing is not included.

⊟ **Fields included in the Research - Authorities spreadsheet**

**Authorities Spreadsheet Field Listing**

| Field Name | What it Displays | Using It |
|---|---|---|
| **Trait Fields** | | |
| Citation | The citation of the authority field. | Type up to 10,000 characters of text. |

| Authorities Spreadsheet Field Listing | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| | | Tip: You have space to add multiple citations, if you want. |
| Date Verified | The date when this authority was last verified to ensure it was still valid. | Type a date in this field or use the Date Stamper. You can enter fuzzy dates such as 5/??/99. |
| Description | The text defining the authority. | Type up to 10,000 characters of text. To ensure consistency, use object short names. |
| Jurisdiction+ | An indication of the court from which the precedent came from. | Add your own values to the list of select N/A for statutes and other research elements where jurisdiction is not applicable. |
| Linked File | The name of the viewer associated with the linked file and the ID of the file or the path to it. | Click to display the Linked File Properties box to set up file viewers. Right-click to display a shortcut menu to view the file and specify the viewer used to display the file. |
| Linked Issues | The issues linked to the authority. | Type the short name of the issues linked to the authority. You can link as many issues as you want to a single authority — just keep typing issue short names. |
| Name | Your name for the authority. | Type up to 255 characters. This name is used to link authority extracts to authorities. |
| Notes | Your comments about the authority. | Type up to 10,000 characters of text. To ensure consistency, use object short names. |
| Related Files | Files that have been manually linked to a record in the spreadsheet. This field is only used in rare instances when it's deemed absolutely necessary to have additional files linked to a record.<br>Tip: Normally, the Linked File field is used to link a file to a record, | Read-only. Click the Ellipsis button in this field to add or remove related files.<br>Use with Caution: Files added to this field through the Related Files dialog box have to be individually re-linked if the files are moved. Files linked to this field will not be included in search |

| Authorities Spreadsheet Field Listing | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| | especially when using the Send to CaseMap feature. Documents that have been linked into CaseMap can be linked to records in other spreadsheets by using the document short name in any description field that displays the chain-link symbol in the field title. | results or reports. Related files will not be linked to other spreadsheets. |
| Type+ | An indication of whether the authority is case law, a statute, or some other type of research. | Use one of CaseMap's predefined values or add a new value to the list. |
| **Evaluation Fields** | | |
| Criticality | An indication of how important an authority is deemed to be. | Select a value (e.g., A - Extremely Critical) from the list CaseMap provides. |
| **# Fields** | | |
| # Authority Extracts | The number of extracts linked to the authority. | Read-only. CaseMap counts the links for you. Double-click to display a list of the extracts linked to the authority. |
| # Issues | The number of issues linked to the authority. | Read-only. CaseMap counts the links for you. Double-click to display a list of the issues linked to the authority. |
| # Open Questions | The number of open questions linked to the authority. Open questions have an answer status of Unaddressed on In Progress. | Read-only. CaseMap counts the links for you. Double-click to display a list of the open questions linked to the authority. |
| # Questions | The number of questions linked to the authority. | Read-only. CaseMap counts the links for you. Double-click to display a list of all questions linked to the authority. |
| **Update History Fields** | | |
| Creation Author | The short name of the author who authorized the authority's entry. | Read-only. CaseMap enters the author's short name. |
| Creation Scribe | The short name of the scribe who | Read-only. CaseMap enters the |

| Authorities Spreadsheet Field Listing | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| | entered the authority on behalf of the author. | scribe's short name. If an author acts as a scribe (i.e., enters the fact in CaseMap), the author's name appears in this field. |
| Creation Time Stamp | The date and time when the authority record was entered. | Read-only. CaseMap enters the date and time for you. |
| Last Update Author | The short name of the author who requested the last update to the authority. | Read-only. CaseMap enters the author's short name for you. |
| Last Update Scribe | The short name of the scribe who made the last update to the authority. | Read-only. CaseMap enters the scribe's short name for you. If an author acts as a scribe (i.e., enters the updates), the author's name displays in this field. |
| Last Update Time Stamp | The date and time when the authority was last updated. | Read-only. CaseMap enters the date and time for you. |

### Extracts from Authorities field listing

| Extracts from Authorities Spreadsheet Field Listing | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| **Trait Fields** | | |
| Authority Name | The name of the authority from which a particular extract is being pulled. | Use the name of the appropriate authority from the list of choices or select the New Authority option. |
| Extract Text | The extract text from the authority sent from another application. | Holds up to 10,000 characters of text. To ensure consistency, use object short names. |
| Description | The text defining the authority extract. | Type up to 10,000 characters of text. To ensure consistency, use object short names. |
| Linked File | The name of the viewer associated with the linked file and the ID of the file or the path to it. | Click to display the Linked File Properties box to set up file viewers. Right-click to display a shortcut menu to view the file and specify the viewer used to |

| Extracts from Authorities Spreadsheet Field Listing | | |
|---|---|---|
| **Field Name** | **What it Displays** | **Using It** |
| | | display the file. |
| Notes | Your comments about the authority extract. | Type up to 10,000 characters of text. To ensure consistency, use object short names. |
| Order | A numeric value that determines where the extract appears in the list pulled from a particular authority. | CaseMap updates the value of the order field for you automatically when you first enter extracts. If you want, you can later edit this value to rearrange how extracts are listed. |
| Related Files | The number of files related to a authority extract. | Read-only. CaseMap counts the number of files related to the question for you. Double-click to display the Related Files box to add and remove related files. |
| **Evaluation Fields** | | |
| Eval by [author's initials] | A symbol indicating the author's evaluation of whether the authority extract weighs for or against us. | Select a value (e.g., For Us, Heavily Against Us, etc.) from the list. |
| Criticality | An indication of how important an authority extract is deemed to be. | Select a value (e.g., A - Extremely Critical) from the list CaseMap provides. |
| **# Fields** | | |
| # Issues | The number of issues linked to the authority extract. | Read-only. CaseMap counts the links for you. Double-click to display a list of the issues linked to the authority extract. |
| # Open Questions | The number of open questions linked to the authority extract. Open questions have an answer status of Unaddressed on In Progress. | Read-only. CaseMap counts the links for you. Double-click to display a list of the open questions linked to the authority extract. |
| # Questions | The number of questions linked to the authority extract. | Read-only. CaseMap counts the links for you. Double-click to display a list of all questions linked to the authority extract. |

**Extracts from Authorities Spreadsheet Field Listing**

| Field Name | What it Displays | Using It |
|---|---|---|
| **Update History Fields** | | |
| Creation Author | The short name of the author who authorized the authority extract entry. | Read-only. CaseMap enters the author's short name. |
| Creation Scribe | The short name of the scribe who entered the authority extract on behalf of the author. | Read-only. CaseMap enters the scribe's short name. If an author acts as a scribe (i.e., enters the fact in CaseMap), the author's name appears in this field. |
| Creation Time Stamp | The date and time when the authority extract record was entered. | Read-only. CaseMap enters the date and time for you. |
| Last Update Author | The short name of the author who requested the last update to the authority extract. | Read-only. CaseMap enters the author's short name for you. |
| Last Update Scribe | The short name of the scribe who made the last update to the authority extract. | Read-only. CaseMap enters the scribe's short name for you. If an author acts as a scribe (i.e., enters the updates), the author's name displays in this field. |
| Last Update Time Stamp | The date and time when the authority extract was last updated. | Read-only. CaseMap enters the date and time for you. |

Related Topics

About fields
Creating custom fields
Analyzing and linking research
Issues spreadsheet field listing
Facts spreadsheet field listing
Objects spreadsheet field listings
Questions spreadsheet field listing

# *Entering Data*

## About entering data

CaseMap offers many features for getting the various types of data you need into your case efficiently.

***The three primary methods for populating a case include:***

- Manually entering data into spreadsheets or using the Case Jumpstart Wizard (populates Cast of Characters in object spreadsheets)
- Using the Send to CaseMap tool to send fact text or documents directly to your case file and to link the case record to the file. Text excerpts are sent the Facts spreadsheets and documents to the Documents spreadsheet or another selected sub-object spreadsheet.

  The Send to CaseMap tool works with Microsoft Outlook, Microsoft Word, Adobe Acrobat or Reader, document management systems like LexisNexis Concordance, LexisNexis TextMap, and case web sites like www.lexis Advance.com. For more information, see About the Send to CaseMap tool.
- Importing data using the Import Linked Files Wizard to automatically link to your case files on the network and create a new case record for each file (populates the Documents spreadsheets and other object sub-level spreadsheets while linking to documents, videos, graphics, photographs, etc.) This also includes an option to automatically import and map the file metadata to a CaseMap object spreadsheet. For more information, see About importing data and Importing linked files.

***Additional methods of getting data into your case include:***

- Sending/saving authority and authority extract content from case law research sites like www.lexis.com (populates Research spreadsheets and links to web site data or PDF files)
- Importing data using the Intake Interview Jumpstart Form (populating the All Objects spreadsheet and other sub-level object spreadsheets)
- Linking to emails in Microsoft® Outlook (populates the Documents spreadsheet and links to emails in Outlook)

**⊟ Learn the facts about data entry**

Once you have created a case in CaseMap, you are now ready to being entering information in spreadsheets to organize and link your case knowledge and elements. Data entered is automatically saved as you work in a spreadsheet and table into another cell, field, or record. There is no Save button or need for one.

Typing data into a cell that already contains text does not overwrite previous text. New data entered will start after the last period. If two people try to type in the same cell simultaneously, an error message displays indicating the conflict.

Anytime you need to undo your last edit, simply press the ESC key or Undo button *before* leaving the field. Once you have saved the record, you can highlight text and press the Backspace key or Delete key to remove information from a cell — just be sure not to delete information that is linked to other data.

**⊟ Learn why short names are integral to analyzing/linking data and creating reports**

Before you import or enter data in a case, you need to develop an understanding of object short names and how they affect the linking of your case information — which is integral to using CaseMap effectively and efficiently.

Short names are unique names created by CaseMap for each object entered in a case and are what make linking case data possible. CaseMap automatically creates short names off of the Full Name field entry. As you enter other data in a case, CaseMap automatically identifies text that already has a short name created for it and links the object short name with case information: issues, facts, questions, and research. You can create your own object short names or modify CaseMap's default short name as needed.

Cells that store short names and link to other case information are identified by the chain link icon in the field header.

For more information, see the About short names help topic.

⊟ **Learn how to enter symbols**

CaseMap allows you to enter a variety of symbols and punctuation in fields.

1. On the **Insert** menu, click **Insert Symbol**.
2. Click on the symbol you want to insert, then click **Insert**.

   The symbol now displays in the field.

Related Topics

About importing data
About the Send to CaseMap tool
Inserting/deleting records
Auto-numbering records
About short names

## Inserting/saving/deleting records

Inserting records and deleting both data and records are simple procedures that can be done at any time. Be certain that you want to remove data or a record before doing so because once a it is permanently deleted, it can't be retrieved without restoring a backup copy of the case or manually re-entering it. Also use caution as data or records deleted from a case may affect linking between case elements and/or attached source files.

⚠ We recommend you make a backup copy of the case before deleting data or records. Once records are deleted, you cannot retrieve the data or records without restoring a backup copy of the case. You can use the Undo feature to restore deleted data *before* you navigate from the cell it was removed from.

## To insert a record into a spreadsheet

New records can be added to a spreadsheet at any time by clicking on the New button located on the Home ribbon or pressing the Insert key on your keyboard. New records display at the bottom of a spreadsheet. Records are saved automatically as you navigate from record to record. To resort the spreadsheet in accordance with the sort order, click Refresh Spreadsheet located under the More button on the Home ribbon.

## To insert a symbol into a record cell

1. Locate the record and cell area where the symbol will be placed.
2. On the **Home** ribbon, click **Symbol** to open the **Insert Symbol** dialog box.
3. In the **Insert Symbol** dialog box, select the symbol you want to use, then click the **Insert** button.
4. 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 in a record. The new record is automatically saved.

***To save a record, choose one of the following options:***

- Click in another spreadsheet record.
- Under New Record, on the Home ribbon, in the Record group, select another record type from the list.
- Click F5.
- Under More, on the Home ribbon, in the Record group, click Refresh Spreadsheet.
- Press the Insert key on the keyboard.
- Press the Down Arrow key.
- Press Tab repeatedly until you tab through all spreadsheet fields for that record and a new record row displays.

## To delete data from a record cell

Delete text within a cell by simply selecting it and pressing the Delete key.

To use the Undo feature to restore deleted data, you must do so before you leave the cell. Once data is deleted and you have selected a new cell or record, it is permanently removed from the case.

## To delete a record from a spreadsheet

***You can delete a record two ways:***

- Under More, on the Home ribbon, in the Record group, click Revert to delete the last record entered in the spreadsheet.
- Select the record in the spreadsheet and click Delete on the Home ribbon, in the Record group.

If you delete an object, authority, or extract record that has annotated linked documents attached to it, the annotations will be deleted with the record. CaseMap will display a message when this occurs, displaying how many linked facts and annotations are attached to the record and will prompt you to confirm the deletion.

### ⊟ To delete all records in view

If necessary, you can delete all records in a spreadsheet. If you want to delete multiple records in a spreadsheet, first filter the spreadsheet to display only those records you want to delete, then use the Delete feature.

⚠ We recommend you use extreme caution when using this feature as records are immediately deleted from the case and cannot be retrieved without restoring a back-copy copy of the case.

1. On the **Case Tools** ribbon, click **Update Records,** and then click **Delete All Records in View**.
2. In the message box to confirm the number of records being deleted, click **OK**.
3. In the message box to confirm the removal again, click **Yes**.

   All records in the current spreadsheet view are now permanently removed from the case.
4. Click **OK** in the message box that displays the number of records deleted.

   Records not selected in the filter for removal remain in the spreadsheet.

Related Topics

About editing data
Using spelling tools
Finding/replacing data and records
Copying/pasting data and records
Making global replacements

## Auto-numbering records

The Auto Number Records utility sequentially numbers the records in the current spreadsheet using a specified starting number and increment. You need to have a number (integer) or text field in the spreadsheet before you can use this feature. We recommend that you create a new text field in the spreadsheet to accommodate auto-numbering needs.

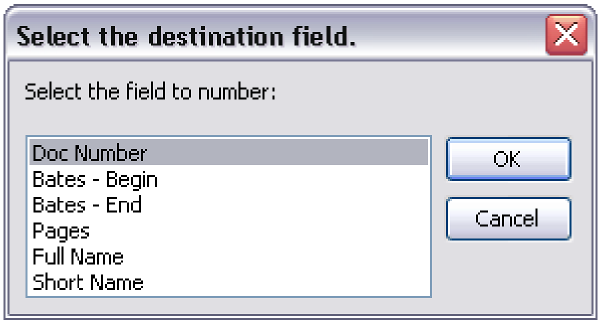
Any data in the selected destination field will be overwritten. For example, if you decide to auto-number records using the Bates - Begin field and those records are Bates stamped, then the auto-numbering format will overwrite the Bates numbers.

⚠ We recommend you make a backup copy of the case before making any global changes, like auto-numbering records in select fields. Once the process is completed, you cannot undo the changes without restoring a backup copy of the case.

### ⊟ To auto-number records in a spreadsheet

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.

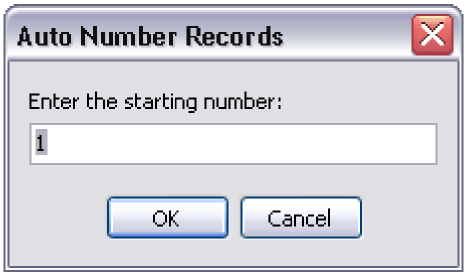
   For more information, see Creating custom fields.
3. Filter records to include only those that you want to apply the new numbering format to.
4. On the **Case Tools** ribbon, click **Update Records**, and then click **Auto Number Records**.
5. In the message box, click **OK**.
6. In the **Select the destination field** dialog box, select the field to number, then click **OK**.


Select the destination field.

Select the field to number:

Doc Number
Bates - Begin
Bates - End
Pages
Full Name
Short Name

   All text fields in the spreadsheet will display in this dialog box. Be certain to select a text field that does not contain data that may be overwritten with the new numbering format.
7. In the **Auto Number Records** dialog box, type in the starting number you want, then click **OK**.


Auto Number Records

Enter the starting number:

1

8. In the next **Auto Number Records** dialog box, type in the increment number, then click **OK**.
9. In the next **Auto Number Records** dialog box, type in the total number of digits, then click **OK**.

   The minimum total number of digits is 5.

10. In the next **Auto Number Records** dialog box, type in the prefix or leave the field blank for no prefix, then click **OK**.
11. In the message box to confirm the numbering process, click **Yes**.

    Remember that data in the selected destination field will be overwritten with the new auto numbering format.
12. In the message box to confirm process completion, click **OK**.
13. Case records in the spreadsheet view now include the new numbering format in the field you selected.

Related Topics

About entering data
Creating custom fields
About Case Tools

## Short Names

### *About short names*

Short names are unique names that represent each object entered in a case and are used by CaseMap to create rich, searchable links and add structure to your case. CaseMap automatically creates short names from the Full Name field entry.

Here is an example of how using short names simplifies data entry and builds relationships into your case. Suppose you are entering a client's statement concerning a witness into CaseMap as a fact. As you enter a client's name, instead of typing the their full name, you enter just a few letters of their name. CaseMap recognizes these the letters as representing your client. You also enter the witnesses name using a different code, which CaseMap also recognizes as representing that particular witness. CaseMap automatically links this new statement by the client to his other statements that have already been entered, as well as to other statements previously made by the witness. After you have entered the statement, you can search for all the other statements your client has made regarding that witness, and any other statements that witness has made in other fact records. Because care was taken to code the names of the client and the witness whenever they were entered in CaseMap using short name aliases, a set of clear and unambiguous relationships can emerge from the mass of facts collected over time.

CaseMap creates links between the facts and other objects in the case database associated with the client's short name, such as documents, questions, research, and issues. By using short names, CaseMap automatically creates a rich web of associations, which can be used to organize your case and identify patterns.

You can create your own object short names or modify CaseMap's default short names as needed. Fields that store short names and link to other case information are Description (10,000 character) fields, identified by the chain link icon in the field header.

⚠ Using short names is not required; you can enter data without using short names. However, not using short names limits the power of CaseMap's primary feature: linking and connecting case knowledge elements between spreadsheets. This feature is what allows you to search and view data in various ways at a moment's notice so you can locate essential information and create reports that shape and support your case strategy.

Once all short names are entered into a case, run a report on the short names and distribute it to case staff so they can familiarize themselves with parties involved in the case and reference the sheet for correct short names.

### ⊟ Use short names to save data entry time

Using short names for data entry expedites the process by reducing keystrokes. Type the first three letters of a short name (not case sensitive) then press **Enter**. The unique short name is entered into a description field and replaces the object's full name as you tab into a new cell on a spreadsheet.

### ⊟ Use short names to ensure consistency

Short names also ensure spelling and linking accuracy. As you type new information into a case, short name entries are automatically identified and links are set connecting the new information to all applicable short name entries. Short name for Persons default to the last name and first initial. You can also customize short names rather than using the default entry. By using short names in this way, case information is properly linked for case analysis and reporting needs.

Short names also help eliminate misspellings or multiple spellings, especially useful for consistently identifying parties involved in the case. For example, if a person's name is entered into a case with multiple spellings or misspellings, CaseMap creates multiple records and short names for the same person. This situation may cause linking issues. To resolve this short names need to be merged into one record on the Persons spreadsheet and verification needs to occur to ensure that all case information links also transferred during this process.

If you can't remember an object's short name, right-click in an empty part of the cell and click Link Assistant or start typing the first letters of what you think the short name entry might be. The Link Assistant will automatically provide suggestions based on the first few key strokes or will provide a listing of all objects for you to select the right match.

For more information, see the Merging short names and Using the Link Assistant help topics.

### ⊟ Understand short name rules and conventions

Using short names brings consistency to your case information. Short names are unique identifiers created by CaseMap based on the object's Full Name entry and can vary depending on whether it is a person, organizations or documents. Without short names, it's easy to enter multiple names or records for the same person, organization, or document.

The following table provides an overview of how short names work in CaseMap.

| Short Name Considerations | |
|---|---|
| **Fields** | **Description** |
| General | CaseMap removes all instances of "The", spaces, and commas. Each remaining word is capitalized. |
| | The maximum character limit is 30 characters with no punctuation or spaces (hyphens and dashes count as characters). |
| | Never use brackets as they block out CaseMap's recognition of short names. |
| | Each short name must be unique. |
| Display | Short names (by default) always display in description fields as underlined with blue dashes to verify that the object is recognized by CaseMap. You can modify short name display by clicking Object Display Options on the View ribbon. |
| | Object short names display in a cell when editing content, then CaseMap reverts to full name display when you move to another cell. |
| Data Entry | You can ignore using capitalization during data entry. CaseMap identifies short names with or without capital letters. |
| Persons | CaseMap creates a person's short name with the last name followed by the first initial. For example, Philip Hawkin's short name is HawkinsP. When customizing short names avoid using common words, e.g. "TO" for Tom Oliver instead of OliverT or OliverTed. |
| | CaseMap removes titles, ignores middle initials, and eliminates all naming distinctions, such as Jr., Sr., II, etc. |
| Organizations | CaseMap removes all instances of "The" and "Inc.". |
| | If the organization's name is two words or less, CaseMap combines the words into one and trims it to 30 characters or less. |
| | If the name is three words or more, CaseMap reduces it to initials or an acronym. |
| Documents | CaseMap uses the initial Bates number of the document as the default short name. It copies this values from the Bates - Begin field. |
| | For documents without Bates numbers, CaseMap creates a short name based on the full name entry up to 30 characters. |
| Printing | Full names automatically replace short names when printing. The blue underline does not display on reports. |

⊟ **Review examples of short names**

A case involving a defendant named Ridge Medical Center could be entered as an object into a case multiple times by different users (Ridge, Ridge Medical, Ridge Medical Center). Staff users could accidentally create multiple object records for the same defendant by entering various spelling, or possible misspellings, for one organization's name. Case data could then be linked to three object entries for one organization. This complicates your case information integrity and makes sorting/filtering data accurately a problem.

Using a short name, like RMC, in reference to the defendant helps minimize these issues by providing an easily identifiable name that can be adopted quickly by all case users. Using RMC as the short name also ensures that you will not miss critical fact information when you filter a chronology of facts for this defendant.

### ⊟ Learn how CaseMap translates full names into short names

The following table describes how CaseMap creates default short names for different object types based off the Full Name field entry.

**Short Name Examples**

| Object Type | Full Name | Short Name |
|---|---|---|
| People | Philip Hawkins | HawkinsP |
| | Col. David R. Onofrey, III, Esq. | OnofreyD |
| Organizations | The Widget Works, Inc. | WidgetWorks |
| | Anstar Biotech Industries | ABI |
| Documents | Document P001232 | P001232 |
| Proceedings | Deposition of Linda Collins | DepositionOfLindaCollins |
| Other | HR notes re Castle Grande | HRNotesReCastleGrande |

You can modify the default short names applied by CaseMap, at any time and as often as you want. For example, you may want to shorten a deposition's default short name to "DepoCollins" as opposed to "DepositionOfLindaCollins".

### ⊟ Automate linking of case information using short names

Links within a case are the pivotal means of connecting information elements so you can view, sort, filter data connections at any time, in the manner that you need it. Using object short names automates this process, eliminating the need to manually link key information together. Short name linking works in any spreadsheet's Description field (identified by a chain link icon), and list or detail dialog boxes. The three most important Descriptions fields in CaseMap are the Fact Text field, Source(s) field, and the Question Text field.

If a case witness, Linda Collins, is mentioned in 150 facts using the short name of CollinsL for information entered regarding her, then her short name is automatically linked to fact records in the Facts spreadsheet and any records where her name appears in an object spreadsheet. Once the links exist, you can display a list of the facts related to Linda Collins any time you want.

***Example of short name linking:***

Fact Text: CollinsL worked for ABI from 1991-2003.

In this instance, CaseMap created two links for Linda Collins. Her name is linked to the Fact Text field on the Facts spreadsheet. And she is also linked to the organization, Anstar Biotech Industries, in the Organization spreadsheet.

> ⚠ Use caution when deleting short names. If you delete a short name from a field, CaseMap immediately deletes it from all spreadsheets and displays "deleted object" where it previously appeared. Any links associated with a deleted short name are lost. To restore your links, you need to recreate the object's short name and reset all links manually by using Edit > Find and Edit > Replace on every spreadsheet where the deleted object might have been added. You could also restore the case from the previous day's backup file, which means you may risk losing some case updates applied since the backup occurred.

For more information, see the Changing short names help topic.

### Use the Short Name Checklist to save planning time

Reference the Short Names Checklist to ensure that you are minimizing any possible data impacts that could be related to short name linking.

**Checklist: Short Names**

| | Task |
|---|---|
| | **Developing a Case of Characters** |
| ☐ | Have you developed a Cast of Characters for all objects, primarily people, and organizations? |
| | **Naming Conventions** |
| ☐ | Do you have file naming conventions in place for all electronic and digital file types? |
| ☐ | Do you have document naming conventions in place? Have you determined how emails, documents, letters, proceedings, and other documentation materials will be named with a short name? |
| ☐ | Have you determined how to manage documents with Bates numbering applied? Will you use Bates numbers as short names for these documents? |

## Checklist: Short Names

| | Task |
|---|---|
| ☐ | Have you noted any people that have identical names or where the short names become identical? Did you find a way to differentiate between them using numbers, using full first names following a last name, or the last four digits of a SSN, etc.? |
| ☐ | Have you located any duplicate people entries? Were you able to merge them keeping any data linking in tact?<br>* See the Merging short names help topic for details. |
| ☐ | Did you locate any short names that might spell a common word, like "to" or "the"?<br>* Short names that are also common words will be overlooked in a search. We recommend that you manually modify the short name entries to avoid this. |
| ☐ | Have you determined whether a short name should be created for a group of people, as opposed to one individual?<br>* This is useful to identify a group or organization involved in a matter, when individuals' names are less of an issue. |
| ☐ | After you bulk import a set documents into a case, did you remember to run the Short Name Assistant utility?<br>* We recommend you run this utility after every bulk import of documents to ensure that any unlinked objects are identified and can be repaired. See the Using the Short name Assistant section for details. |
| | **Educating Case Users** |
| ☐ | Do case users understand the importance of and how to use short names when working in a case? Or is this task restricted to certain staff? |
| ☐ | Have you determined any guidelines for how case staff will enter new short names on the fly during case analysis? |
| ☐ | Did you give case staff a short names reference listing?<br>* See the Hiding Documents when Printing section for details. |
| ☐ | If you have a new short name entry (person or organization) once case analysis has started, do you have process in place for notifying case staff? |

Related Topics

Using the Link Assistant

Changing short names

Changing short name display
Merging short names
Using the Short Name Assistant

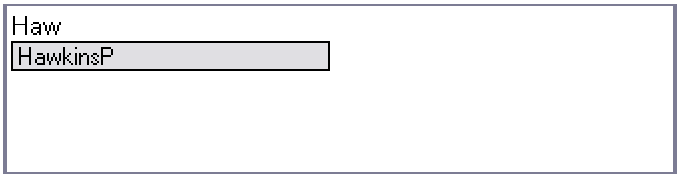
### *Using the Link Assistant*

If you've forgotten the spelling of a short name, the Link Assistant tool contains a listing of all previously associated short names and allows you to select from the entries. As you type information, the Link Assistant automatically tries to identify any associated short names for you by displaying possible spelling matches in a pop-up window for you to select or accept. The Link Assistant is accessible from all description fields, which are identifiable by the chain link icon.

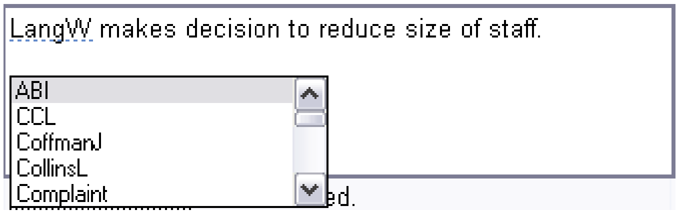
#### To use the Link Assistant tool

1. Click in the cell of a description field.
2. Start typing what you think the short name might be.
3. When the Link Assistant offers a suggestion as you type, press **Enter** to accept the entry and simply continue typing information.

   The Link Assistant selects and displays short names based on possible matches for letters you have started to type.


Haw

4. If you don't know the short name at all, right-click in the cell's white space and click the appropriate short name entry from the **Link Assistant** listing.


LangW makes decision to reduce size of staff.

To open the Link Assistant, you can also press CTRL + SPACEBAR.

#### To set Link Assistant options

If the Link Assistant is launching either too quickly or not fast enough, you can adjust the sensitivity settings by selecting how many characters are typed before the pop-up window displays. Link Assistant settings apply to all cases accessed in CaseMap.

To modify Link Assistant settings, click Options on the File menu. On the Spreadsheet tab under Link Assistant, click on the Sensitivity setting preferred.

You can also disable the Link Assistant tool here by clearing the Auto-Popup check boxes for both objects and issues.

Related Topics

About short names
Changing short names
Using the Short Name Assistant

### *Changing short names*

Using CaseMap's default short name ensures consistency and reduces confusion for identifying short names. There are times when changing a short name is necessary, such as when it conflicts with a common word or there is another valid reason.

If you need to change a short name for one that is more recognizable, you can do so at any time. Changing a short name does not impact existing links made with the current or previous short name entry. Once these links are set, CaseMap maintains them for you.

***Valid reasons to change short names include:***

- Avoiding use of a short name that is also a common word
- Avoiding confusion when several people have the last same name and first initial
- Using a recognized nickname or moniker for a crucial object, as opposed to the default option
- Adding a shorter name that requires less key strokes for data entry

⚠ Once you change a short name, the new entry is immediately visible to all users in the case and must be understood and accepted as the new short name. Ensure that all case users are notified of the upcoming change beforehand to reduce any confusion.

⊟ **To review examples of changing short names**

**Example:** Sarah Day = DayS

This short name is not acceptable because CaseMap reads the entry as "days" and ignores it during a search. In this instance, you will want to change the short name to "DaySa" or something similar.

**Example:** OJ

Full Name: Orange Juice Simon

Default Short Name: SimonO

Modified Short Name: OJ

Using Simon's moniker of OJ is both commonly identifiable and reduces five key strokes during data entry.

### ⊟ To review tips for changing short names

- If you have a class action law suit with 50 people named John Smith, the best way to differentiate them is to add the last four digits of their social security numbers to the short name. If there's only a few people with the same name, using state abbreviations may be enough (if there are no state conflicts).
- If a case involves several family members with the same name or initials, we suggest you use first names to identify them: SmithBarb, SmithBob, SmithBridg.
- If a crucial object has a recognized nickname, use it as the object's short name based on the 80-20 rule that 20 percent of the witnesses, documents, and other objects in a case will generate 80 percent of the facts and questions.

### ⊟ To change a short name

1. In the **Case Shortcuts** pane, click the spreadsheet icon for the spreadsheet (e.g., Persons) you want to use.
2. Click in the cell for the short name entry you want to change.
3. In the **Short Name** field, highlight the short name entry and press **Delete** on the keyboard.
4. In the **Short Name** field, type the new short name and then click out of the cell.

   The new short name is now changed in every instance where the former short name displayed in the case.

Related Topics

About short names
Using the Link Assistant
Changing short name display
Merging short names

### *Changing short name display*

CaseMap always displays short names in description fields as underlined with blue dashes. Object short names display in a description fields (by default) when editing content, then CaseMap reverts to full name display when you exit the cell.

You can modify the short name display settings to your personal view. These settings do not affect other user views. Changing object display options affects the display of short names in description fields in spreadsheet views, list dialog boxes, and detail dialog boxes.

### ⊟ To change short name display

1. On the **View** menu, click **Underline Objects** to add/remove the blue underline from object display in description fields.

   By default, objects are underlined with blue dashes.

2. Click **Show Full Name** to turn off/on whether an object full name displays in description fields when you exit the cell.

   By default, object full names display in description fields unless you click in the cell, then short names display.

**Related Topics**

About short names
Changing short names

### *Merging short names*

If two objects with similar short names are entered into the case and are actually the same object, you need to merge them together to reduce linking and sorting consistencies in the case. Using the Object Link Merger tool, you select one object to keep and one to delete, and the utility transfers the links for you.

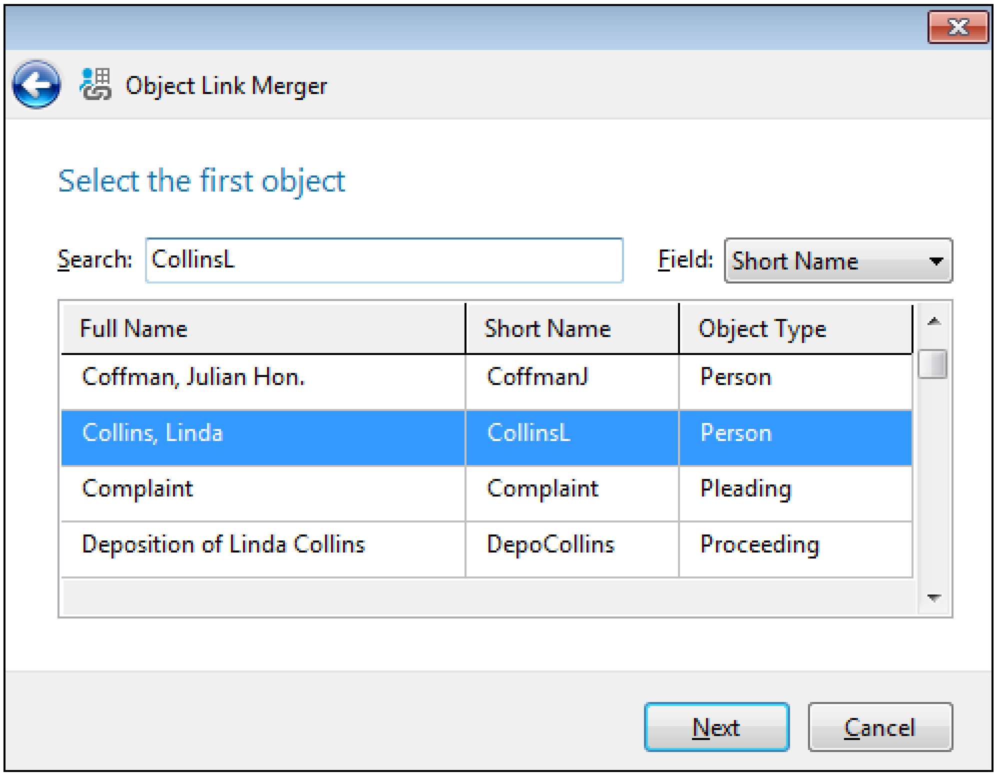
⚠ The Object Link Merger only transfers objects links; it does not transfer any other data between records. If you need to retain data from other record cells for the object identified for deletion (especially for document records), then copy/paste that data to the object you are keeping before using the utility.

⚠ Use caution when deleting short names. If you delete a short name from a field, CaseMap immediately deletes it from all spreadsheets and displays "deleted object" where it previously appeared. Any links associated with a deleted short name are lost. To restore your links, you need to recreate the object's short name and reset all links manually by using Edit > Find and Edit > Replace on every spreadsheet where the deleted object might have been added. You could also restore the case from the previous day's backup file, which means you may risk losing some case updates applied since the backup occurred.

### ⊟ To merge short names

1. Open the object spreadsheet where you need to merge short names.

2. On the **Case Tools** ribbon, click **Object Link Merger**.
3. In the **Object Link Merger** dialog box, click **Next**.
4. In the **Field** list, click **Short Name**.
5. In the **Search** field, type the first short name entry and then click **Next**.



Search: CollinsL

Field: Short Name

| Full Name | Short Name | Object Type |
|---|---|---|
| Coffman, Julian Hon. | CoffmanJ | Person |
| Collins, Linda | CollinsL | Person |
| Complaint | Complaint | Pleading |
| Deposition of Linda Collins | DepoCollins | Proceeding |

6. In the **Search** field, type the second short name entry and then click **Next**.
7. Select the object short name you want to delete and then click **Next**.
8. Review your choices by selecting the object to delete, and then click **Next**.
9. Confirm and click **Finish** to initiate the link merger process.
10. In the message box to perform another object link merger, click **No**.

    The short name entry you selected to delete no longer displays in the case. Notice that all # Fields now display a higher number of links for the record you retained in the case.

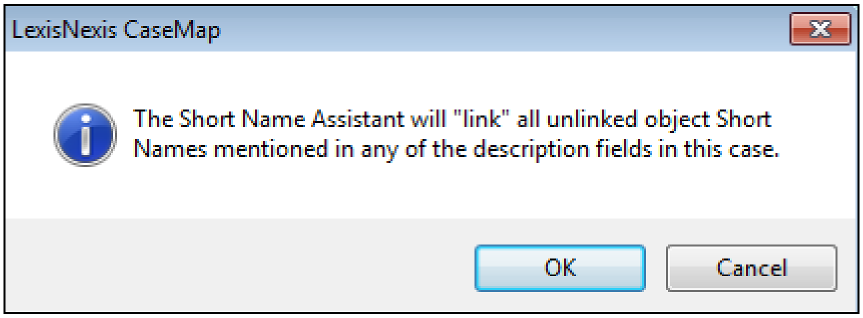
Related Topics

About short names
Changing short names
Using the Short Name Assistant

### *Using the Short Name Assistant*

After you bulk import a set of documents, you may want to run the Short Name Assistant utility as a standard practice. The Short Name Assistant utility identifies any unlinked objects mentioned in description fields for the imported documents and sets links for them to any other applicable case elements.

To run this utility, click Case Tools, and then click Short Name Assistant.



The Short Name Assistant will "link" all unlinked object Short Names mentioned in any of the description fields in this case.

The Short Name Assistant does not link names imported as full names. Full names need to be replaced with short names in the source file before the import or in all spreadsheet description fields before running the Link Assistant.

Related Topics

[About short names]
[Changing short names]
[Merging short names]

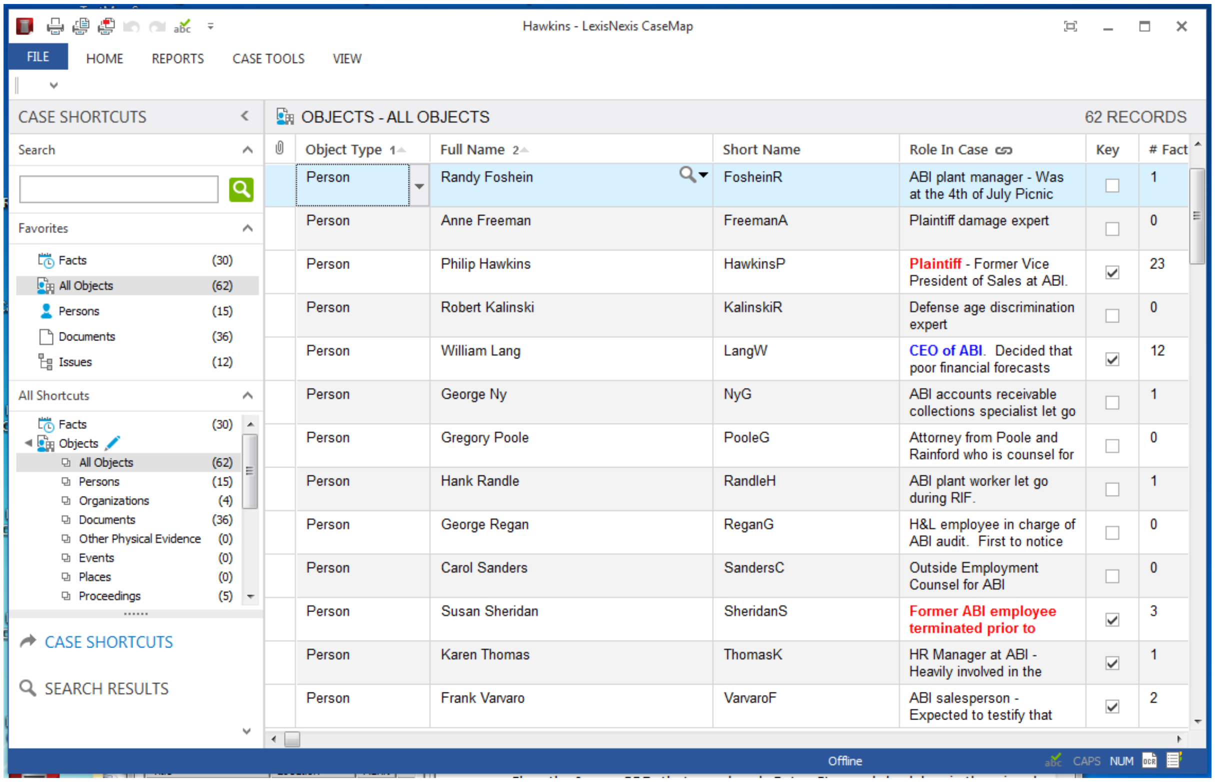
## Entering Objects

### *About objects*

CaseMap's Objects spreadsheets are where you organize your lists of "nouns" or Cast of Characters regarding the case, including persons, places, events, documents, evidence, proceedings, and pleadings. When you read "object" in CaseMap, think of all the people, organizations, documents, and other things that have a role to play in the case.

The All Objects spreadsheet contains a grouping of persons, organizations, documents, and other object lists. The fields in this spreadsheet are common to all object types.

By using the All Shortcuts pane, you can further drill down into sub-level spreadsheets to view only the Persons listing or all Pleadings entered in the case. Fields are specific to individual object spreadsheets. For example, you will find a Phone Numbers field on the Persons spreadsheet and a Bates - Begin and Bates - End field on the Documents spreadsheet.


Hawkins - LexisNexis CaseMap
FILE
HOME
REPORTS
CASE TOOLS
VIEW
CASE SHORTCUTS
Search
Favorites
Facts (30)
All Objects (62)
Persons (15)
Documents (36)
Issues (12)
All Shortcuts
Facts (30)
Objects
All Objects (62)
Persons (15)
Organizations (4)
Documents (36)
Other Physical Evidence (0)
Events (0)
Places (0)
Proceedings (5)
CASE SHORTCUTS
SEARCH RESULTS
Offline
CAPS
NUM

OBJECTS - ALL OBJECTS 62 RECORDS

| Object Type 1 | Full Name 2 | Short Name | Role In Case | Key | # Fact |
|---|---|---|---|---|---|
| Person | Randy Foshein | FosheinR | ABI plant manager - Was at the 4th of July Picnic | ☐ | 1 |
| Person | Anne Freeman | FreemanA | Plaintiff damage expert | ☐ | 0 |
| Person | Philip Hawkins | HawkinsP | **Plaintiff** - Former Vice President of Sales at ABI. | ☑ | 23 |
| Person | Robert Kalinski | KalinskiR | Defense age discrimination expert | ☐ | 0 |
| Person | William Lang | LangW | **CEO of ABI**. Decided that poor financial forecasts | ☑ | 12 |
| Person | George Ny | NyG | ABI accounts receivable collections specialist let go | ☐ | 1 |
| Person | Gregory Poole | PooleG | Attorney from Poole and Rainford who is counsel for | ☐ | 0 |
| Person | Hank Randle | RandleH | ABI plant worker let go during RIF. | ☐ | 1 |
| Person | George Regan | ReganG | H&L employee in charge of ABI audit. First to notice | ☐ | 0 |
| Person | Carol Sanders | SandersC | Outside Employment Counsel for ABI | ☐ | 0 |
| Person | Susan Sheridan | SheridanS | **Former ABI employee terminated prior to** | ☑ | 3 |
| Person | Karen Thomas | ThomasK | HR Manager at ABI - Heavily involved in the | ☑ | 1 |
| Person | Frank Varvaro | VarvaroF | ABI salesperson - Expected to testify that | ☑ | 2 |

## Objects Spreadsheets Overview

All objects have both a full name and a short name.

Most sub-level object spreadsheet data is included in the master All Objects spreadsheet, specifically common fields.

* Additional sub-level spreadsheet fields that are not in the All Objects spreadsheet view are accessible by selecting the record and then clicking on the Record Detail button .

When you enter data or update a description field, only object short names appear or are recognized. Full names disappear, even if this option is selected. Full names reappear as soon as you leave the cell.

### ⊟ Create a Cast of Characters first

We recommend that you enter a basic Cast of Characters into CaseMap at the beginning of each case to determine short name conventions and identify any names that might need short name modifications. Having object short names known before data entry and import speeds the data entry process and helps eliminate rework of duplicate entries and/or linking issues later.

Once the Cast of Characters is complete, we recommend that you manually enter the objects in the All Objects spreadsheet or sub-level spreadsheets to create and modify the short names. When case information is sent to CaseMap or imported later, all objects are then immediately recognized with automatic linking to case elements set in place — removing the need to manually link and connect it later.

### ⊟ Create generic short names for terms or groups

If you have a case where multiple people only need to be identified by a job or class, you may want to use a generic term as the short name instead of entering 150 or 150,000 people into the case.

**Example:** Terminal Operator

An organization may have 500 terminal operators in a class action lawsuit. By using "Terminal Operator" as the short name, you are simplifying data entry and streamlining searching and sorting options.

**Example:** Bloods or DEA

You may consider consolidating groups of two or more people into one name that best identifies the actual party. Members of a street gang or employees or members of an organization or department might better be identified in a group short name than individually.

### ⊟ Review tips for using object spreadsheets

Use object spreadsheets to produce document indexes, exhibit lists, witness lists, and a Cast of Characters report.

Reference the following list for of examples for using some of the sub-level object spreadsheets.

**Tips for using object spreadsheets**

| Spreadsheet | Use |
|---|---|
| Other Physical Evidence | Can be used as a catch-all for extra information. |
| Events | Best used to aggregate a subset of facts based on one event; a primary contributing factor to a main fact.<br>For example, setting "The Company Picnic" as an event allows you to reference it in a number of facts and search for the set of facts connected to this event — all which may be critical the case. |
| Places | Can more than just a physical address. A place can be an alley, a conference room, elevator, plot of land, etc. |

| Tips for using object spreadsheets | |
|---|---|
| **Spreadsheet** | **Use** |
| Other Discovery | Track interview notes, request for productions, etc. |
| Demonstrative Evidence | Link and track charts, slide presentations, videos, photographs, and other files supporting the case. |
| Other Objects | Great for storing Lexicons, a dictionary or glossary of case jargon. |

Related Topics

About entering data
About short names
Entering objects

### *Entering objects*

When first entering objects in a new case, you have options for how you may want to proceed. Review each option and decide what works best for the case and case staff. Data entered in spreadsheet cells is automatically saved as you navigate to a new cell or record. Sub-level spreadsheet fields change as they relate to each spreadsheet.

***You can enter objects by:***

- Typing all objects data in the All Objects spreadsheets
- Typing object data by type into each sub-level spreadsheet
- Use the Case Jumpstart Wizard to populate a Cast of Characters for a new case

After a case is populated with data, you have the option of entering objects on the fly. For example, you may be entering fact text information when you type in a person's name that has yet to be added to the case. You can enter it from the Facts spreadsheet without interrupting the task at hand. For more information, see the section below To enter objects on the fly.

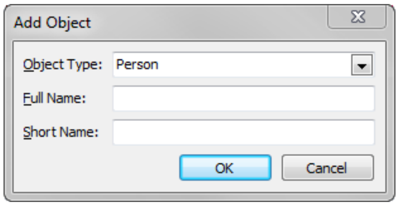
As cases become populated with facts and issues, you may find some fields automatically display data when new objects are entered because case elements are linking.

Object spreadsheet detail dialog boxes are forms for capturing additional details in fields that are not visible in spreadsheet view. Click the Detail button to display the detail dialog box for a particular object in the spreadsheet.

## ⊟ To enter objects in the All Objects spreadsheet

1. On the **Home** tab, under **More**, click **Add Object**.

   A blank object record automatically displays for you to start entering data.

2. In the **Object Type** list, click on the object type (e.g., Person) for the record you are entering.

3. In the **Full Name** cell, type the full name for the object you are entering.

4. Press the **Tab** key.

   Notice that a Short Name field entry is automatically created based on the Full Name entry.

5. Click **OK**.

   The new record is added to the selected object type (e.g., Person) spreadsheet.

6. Click **New Record** button and click **Objects** to continue entering object records.

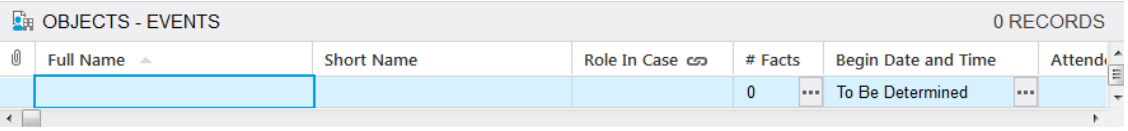
   You can also press the Insert key to add a new blank record into a spreadsheet.

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

## ⊟ To enter objects in sub-level spreadsheets

1. On the **Home** tab, click **New Record**, and then select the icon for the spreadsheet (e.g., Events) you want to open.

   If this is a new case, a blank object record automatically displays for you to start entering data.

   | Full Name | Short Name | Role In Case | # Facts | Begin Date and Time | Attend |
   |---|---|---|---|---|---|
   | | | | 0 | To Be Determined | |

2. In the **Full Name** cell, type in the full name for the object you are entering.

3. Press the **Tab** key.

   Notice that a Short Name field entry is automatically created based off the Full Name entry.

4. Scroll to the right and enter additional field data as appropriate.

5. Click on the **New Record** button to continue entering object records as applicable.

   You can also press the Insert key to add a new blank record into a spreadsheet.

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

### To enter objects using the Case Jumpstart Wizard

See the help topic Using the Case Jumpstart Wizard.

### To enter objects "on the fly"

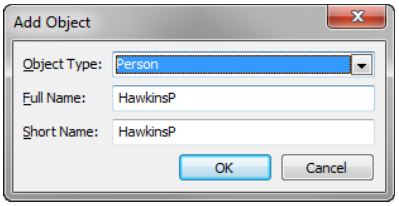
If you are entering facts and notice a person or organization has not been entered in the case, you can create one on the fly without having to stop and manually enter a record in an objects spreadsheet. You can identify an object that is new to the case because it does not display a Short Name Link Assistant entry when you type in the first three letters of the short name.

When you enter an object on the fly, only the full name and short name are created for the object record. You will later need to return to the sub-level spreadsheet and complete enter additional field information for that record.

1. Highlight the object's full name in the cell you are working in.

2. Right-click and then click **Add Object**.

3. In the **Add Object dialog** box, modify the **Object Type**, **Full Name**, or **Short Name** field data as needed.



Add Object

Object Type: Person

Full Name: HawkinsP

Short Name: HawkinsP

4. Click **OK** to save the object record and continue typing the information you were currently entering.

### To delete objects

1. In the object spreadsheet, click on the object record you want to delete.

2. Click the **Delete Record** button on the **Standard** toolbar.

   The object record is now permanently deleted from the case.

⚠ When you delete an object record, you also delete links between the object and any associated case elements. Be sure to make note of any linked data prior to deleting a fact.

Related Topics

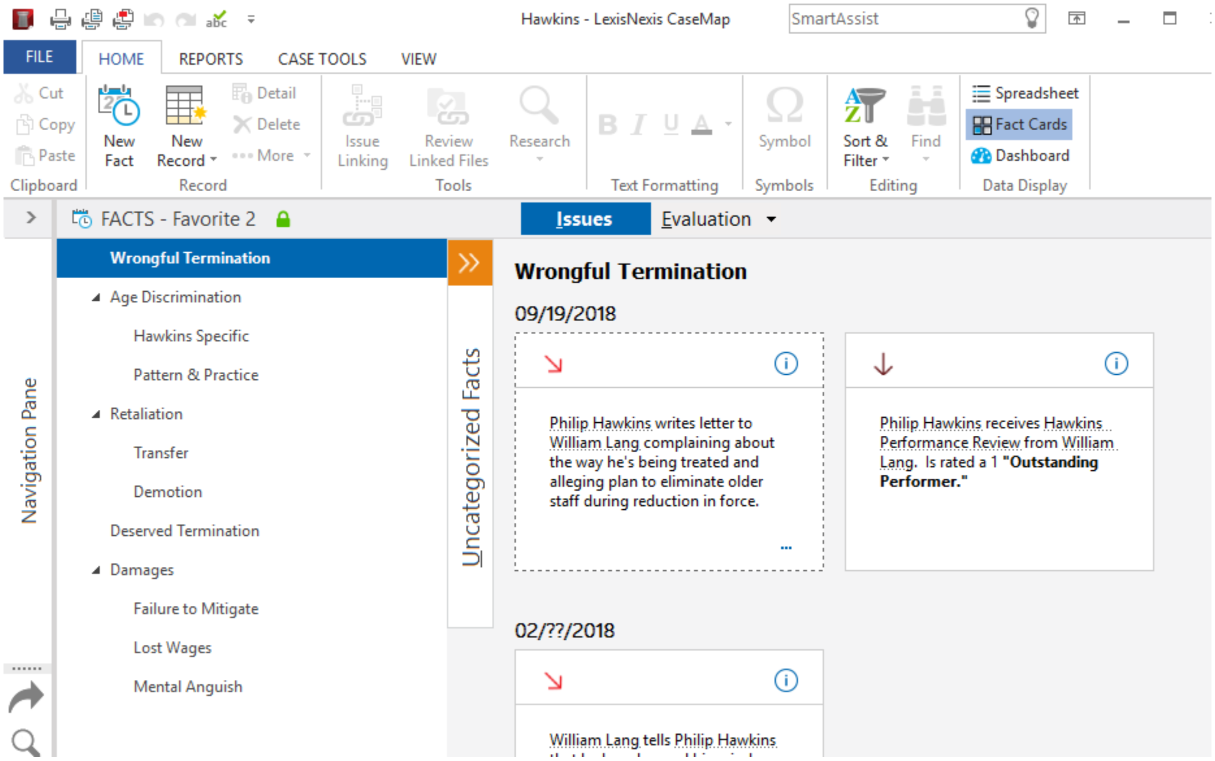
[About objects](#)
[Analyzing and linking objects](#)

## Entering Facts

### *About Facts*

The Facts spreadsheet is where you build the fact chronology for your case, including known facts, potential facts, and rumors. Each fact is entered as an individual record so that you can categorize and link your facts to issues, people and documents. You can also assign evaluations to facts and use them to identify strengths and potential weaknesses of your case.

Facts are viewed, edited and analyzed in the List view (spreadsheet) and fact cards view.


Hawkins - LexisNexis CaseMap
SmartAssist
FILE
HOME
REPORTS
CASE TOOLS
VIEW
Cut
Copy
Paste
Clipboard
New Fact
New Record
Detail
Delete
More
Record
Issue Linking
Review Linked Files
Research
Tools
B I U A
Text Formatting
Symbol
Symbols
Sort & Filter
Find
Editing
Spreadsheet
Fact Cards
Dashboard
Data Display
FACTS - Favorite 2
Issues
Evaluation
Navigation Pane
Wrongful Termination
Age Discrimination
Hawkins Specific
Pattern & Practice
Retaliation
Transfer
Demotion
Deserved Termination
Damages
Failure to Mitigate
Lost Wages
Mental Anguish
Uncategorized Facts
Wrongful Termination
09/19/2018
02/??/2018

Philip Hawkins writes letter to William Lang complaining about the way he's being treated and alleging plan to eliminate older staff during reduction in force.

Philip Hawkins receives Hawkins Performance Review from William Lang. Is rated a 1 **"Outstanding Performer."**

William Lang tells Philip Hawkins

**Fact cards view helps you classify and evaluate facts.**

Over 35 litigation support programs have integrated with CaseMap, incorporating a Send to CaseMap feature. However, when you first begin a new case, you can begin building your Fact Chronology by manually entering data as it is gathered in the List View (spreadsheet view) or by using Entity Recognition for Fact Entry. This feature allows you to automatically recognize Objects when importing from a PDF file or Word document. See [Entity Recognition for Fact Entry](#) for more information.

If you have Adobe Acrobat or Reader, you can set up PDF documents as objects and cull linked facts from them to directly populate the Facts spreadsheet.

Related Topics

- About PDFs and DocPreviewer
- Fact cards
- About the Facts spreadsheet
- Entering facts in the spreadsheet view

### *About the Facts spreadsheet*

On the Home ribbon, you can choose the List View (spreadsheet view).

You can enter, view, and edit the fact chronology for the case. In this view, each fact is entered as an individual record and can be linked to issues, evaluations, and objects.

| Facts Spreadsheet Overview |
|---|
| The Facts spreadsheet sorts by the Date & Time field (by default). |
| All new fact records display at the bottom of the spreadsheet until you finish entering data. |
| All facts without a date entry default to "To Be Determined" and display at the top of the spreadsheet until a date/time is established and the record is updated with a date entry. |
| To refresh the Facts spreadsheet and sort it into chronological order, click Refresh Spreadsheet on the Home ribbon by clicking the More button or pressing F5. |

Related Topics Related

- About entering data
- About spreadsheets
- Entering facts
- Fact Cards

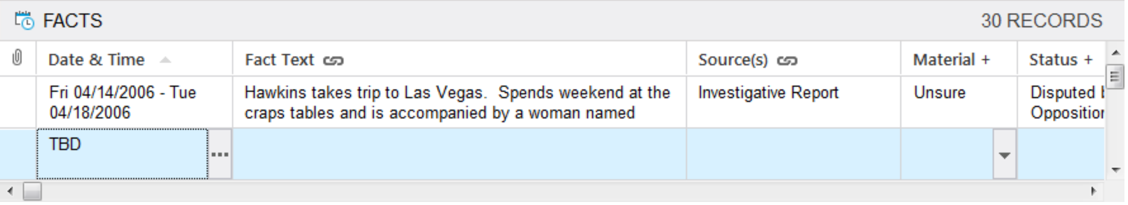
### *Entering Facts in the spreadsheet view*

When you enter facts in the Facts spreadsheet, we recommend that you type using short names so that you automatically link the fact record to any objects already populated in the case.

#### To enter facts

1. On the **Home** tab, click **New Record**, and then select **Fact**.

   A blank fact record automatically displays at the bottom of the spreadsheet for you to start entering data.



| | Date & Time | Fact Text | Source(s) | Material + | Status + |
|---|---|---|---|---|---|
| | Fri 04/14/2006 - Tue 04/18/2006 | Hawkins takes trip to Las Vegas. Spends weekend at the craps tables and is accompanied by a woman named | Investigative Report | Unsure | Disputed I<br>Oppositior |
| | TBD | | | | |

2. In the **Date & Time** cell, type in the date and time the fact occurred.
3. In the **Fact Text** cell, type in a short summary of the fact, using short names for objects.

   Additional fact information can be added to the Description field for this record.

   Notice that when you type using short names you are automatically linking the fact record to objects (people, organizations, documents, etc.)
4. In the **Source(s)** cell, type the source for this fact (such as Interview Notes).
5. In the **Material** cell, click **No**, **Unsure**, or **Yes**.
6. In the **Status** cell, click on the applicable disputed or undisputed status.
7. Click on the **New Record** button and click **Fact** to continue entering fact records.

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

#### To delete facts

1. In the **Facts** spreadsheet, click to select the fact record you want to delete.
2. Click the **Delete Record** button on the **Standard** toolbar.
3. Click **Yes** in the confirmation screen.

   The fact record is now permanently deleted from the case.

⚠ When you delete a Fact record, you also delete links between the fact and any associated case elements. Be sure to make note of any linked data prior to deleting a fact.

Related Topics

[About facts](#)
[Setting the date and time zone](#)
[Analyzing and linking facts](#)

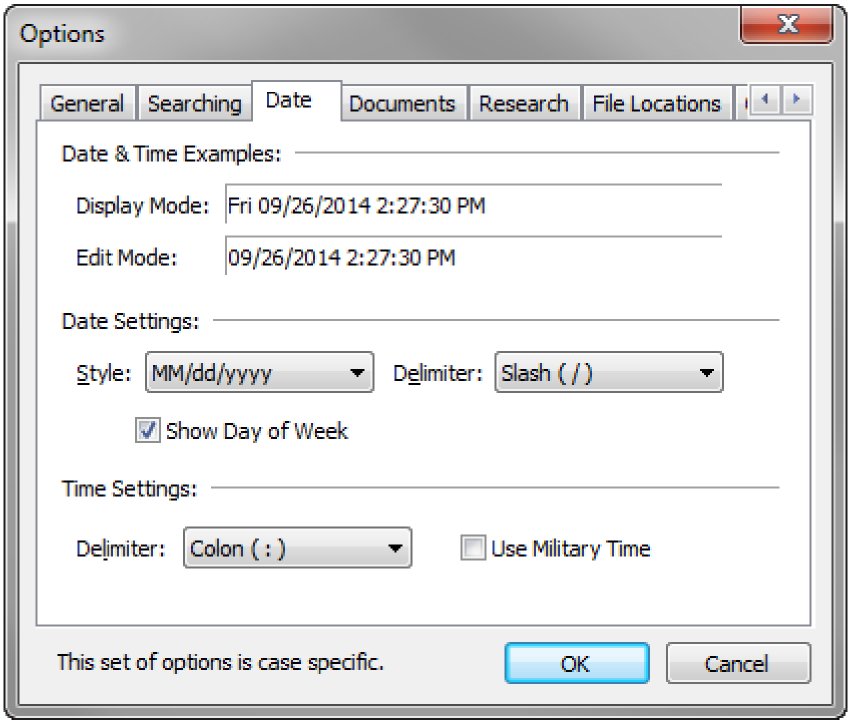
### *Setting the date and time for facts*

When entering facts, you want to pre-determine how dates are being read and entered for the case. CaseMap dates default to MMDDYYYY entries. You can choose whether to display the day and time in the File > Options > Date tab. CaseMap date fields can accommodate common date field entries, including month and year entries, as well as date ranges.

> The Facts spreadsheet sort order defaults to the Date and Time field. Facts entered without dates receive a "To Be Determined" designation and sort to the top of a spreadsheet until a date is entered.

### ⊟ How to use fuzzy dates

You have the option of using incomplete or "fuzzy" dates if you do not know the exact day an event occurred, but you do know the month and year.


Options
General
Searching
Date
Documents
Research
File Locations
Date & Time Examples:
Date Settings:
Time Settings:
OK
Cancel

Display Mode: Fri 09/26/2014 2:27:30 PM
Edit Mode: 09/26/2014 2:27:30 PM
Style: MM/dd/yyyy
Delimiter: Slash ( / )
☑ Show Day of Week
Delimiter: Colon ( : )
☐ Use Military Time
This set of options is case specific.

*Example:* An entry of 8/99 is read as 08/??/1999 and sorted as August 1, 1999.

*Example:* Entering 99 is read by CaseMap as ??/??/1999 and sorted as January 1, 1999.

### How date ranges are sorted

Date ranges are sorted based on the first date entered and are best separated with a hyphen.

*Example:* 7/1/08 - 7/4/08

### How to specify time

Date fields also accommodate time display in 12-hour or 24-hour options (military time). To add the morning or evening, simply type "am" or "pm". You can also enter the hour using "fuzzy" time.

*Example:* An entry of 4:?? is read as 4:00 a.m.

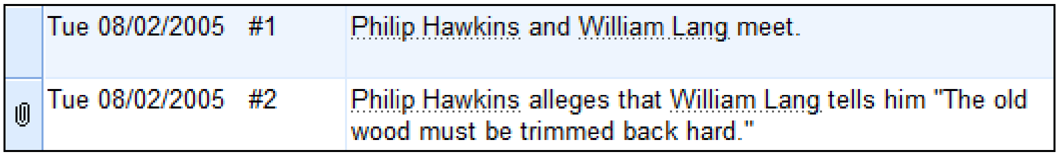
> You cannot enter a time if a date entry has not been made. If you try to enter a time, CaseMap reads the hour as the year and the minutes as the hour.

> ⚠ If a case's time zone is not entered properly during the creation of a new case, you may have discrepancies with accurate time zones. For example, a 9:00 a.m. meeting in Los Angeles, CA, may appear to have happened before a 9:15 a.m. meeting in New York City. This could adversely affect your perception of the case chronology. The time zone for the case should be set to where most of the case facts occurred.

### How to organize dates sequentially

Facts that have the same date and time can be organized sequentially by inserting the # symbol into the Date & Time field and then typing a number indicating their order. Facts will sort according to the number sequence.

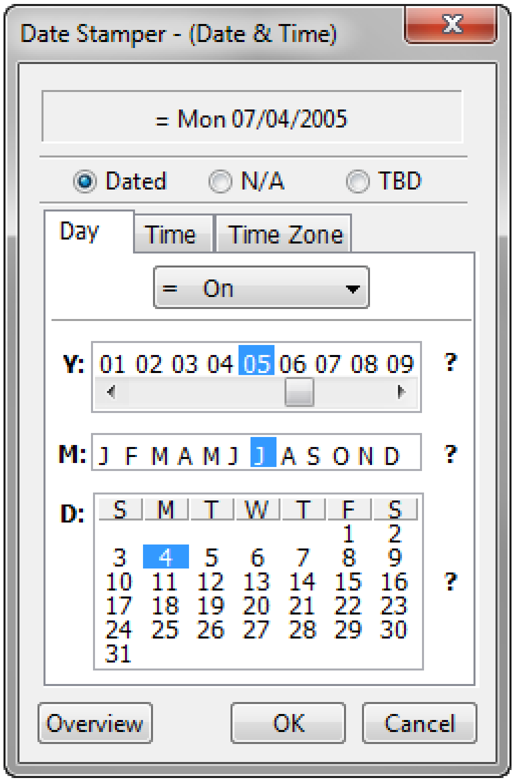
For example, two facts are shown below. The first fact record (#1) is a meeting that occurred. The second fact record is a discussion (#2) that took place during the meeting (#1).



| | | |
|---|---|---|
| | Tue 08/02/2005 #1 | Philip Hawkins and William Lang meet. |
| | Tue 08/02/2005 #2 | Philip Hawkins alleges that William Lang tells him "The old wood must be trimmed back hard." |

### How to use the Date Stamper

The Date Stamper tool is used to assist with date and time entries by setting the date and time, or editing it if already displaying within a field. Using this tool is optional, but it is helpful for setting time zone abbreviations when cases include facts occurring in various parts of the country or internationally.



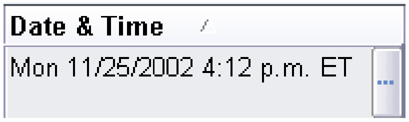
Date Stamper - (Date & Time)

= Mon 07/04/2005

● Dated ○ N/A ○ TBD

Day
Time
Time Zone
= On
Y:
01 02 03 04 05 06 07 08 09
?
M:
J F M A M J J A S O N D
?
D:
S M T W T F S
1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
31
?
Overview
OK
Cancel

Access the Date Stamper in any spreadsheet date field by clicking the Ellipsis button in the cell.



**Date & Time**

Mon 11/25/2002 4:12 p.m. ET

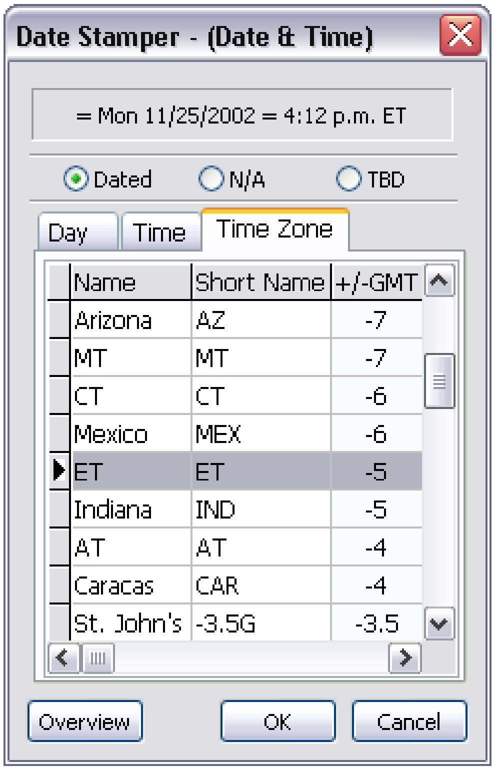
The Date Stamper is accessible in six fields:

- Date & Time (Facts)
- Deposition Date (Persons)
- Date (Documents)
- Begin Date and Time (Events)
- End Date and Time (Events)
- Due Date (Questions)

### ⊟ How to adjust the time zone

Use the Time Zone tab to indicate the time zone where a fact or event occurred. Typically, you do not need to set the time zone while entering dates because CaseMap automatically sets the time zone of each date you create according to the case's default time zone. You only need to select a time zone when a particular fact of event occurred outside the case's primary time zone or you can only identify it in relation to Greenwich Mean Time.

*Example:* An event occurring in Katmandu, Nepal would need to be identified as GMT +5:45.



= Mon 11/25/2002 = 4:12 p.m. ET

● Dated ○ N/A ○ TBD

| Name | Short Name | +/-GMT |
|---|---|---|
| Arizona | AZ | -7 |
| MT | MT | -7 |
| CT | CT | -6 |
| Mexico | MEX | -6 |
| ET | ET | -5 |
| Indiana | IND | -5 |
| AT | AT | -4 |
| Caracas | CAR | -4 |
| St. John's | -3.5G | -3.5 |

***Use the Time Zone tab to:***

- Adjust the time zone for an event that occurred outside the case's primary time zone
- Adjust time zones when the case's primary time zone was not set
- Set general time zones, like Eastern (ET) or Western (WT) time
- Identify an event that occurs in relation to Greenwich Mean Time

Related Topics

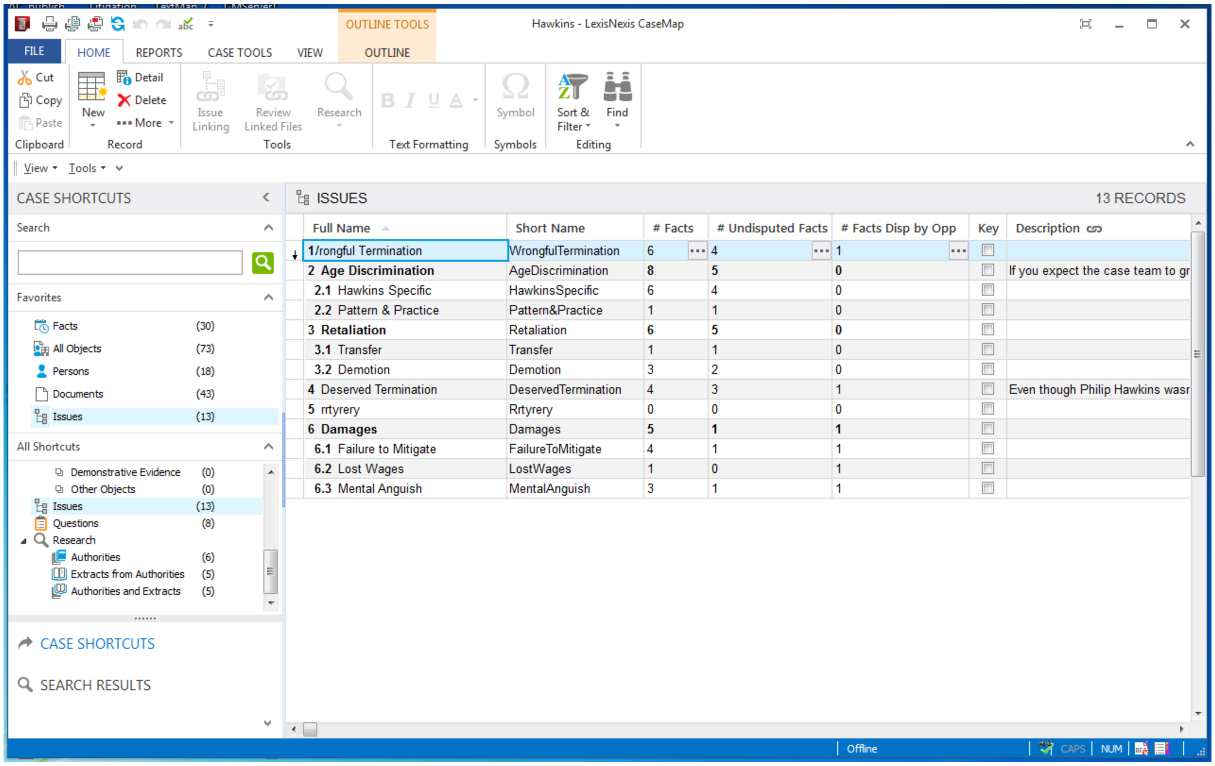
About facts
Entering facts
Analyzing and linking facts

## Entering Issues

### *About issues*

Issue outlining most often begins when you first accept a client case and becomes an unending work-in-progress throughout the life of a case. When you accept a case, start outlining your issues in the Issues spreadsheet so you can quickly develop a hierarchy of claims, counterclaims, and any other known arguments.

The Issues spreadsheet can hold as many levels or sub-issues as you want and is automatically numbered (1, 1.1, 1.1.1) to indicate main issues and sub-level items for a case. The Issues spreadsheet numbering format is hard-coded and cannot be customized.


OUTLINE TOOLS
Hawkins - LexisNexis CaseMap
FILE
HOME
REPORTS
CASE TOOLS
VIEW
OUTLINE
Cut
Copy
Paste
Clipboard
New
Detail
Delete
More
Record
Issue Linking
Review Linked Files
Research
Tools
Text Formatting
Symbol
Symbols
Sort & Filter
Find
Editing
View
Tools
CASE SHORTCUTS
Search
Favorites
Facts (30)
All Objects (73)
Persons (18)
Documents (43)
Issues (13)
All Shortcuts
Demonstrative Evidence (0)
Other Objects (0)
Issues (13)
Questions (8)
Research
Authorities (6)
Extracts from Authorities (5)
Authorities and Extracts (5)
CASE SHORTCUTS
SEARCH RESULTS
Offline
CAPS
NUM

ISSUES 13 RECORDS

| Full Name | Short Name | # Facts | # Undisputed Facts | # Facts Disp by Opp | Key | Description |
|---|---|---|---|---|---|---|
| **1/rongful Termination** | WrongfulTermination | 6 | 4 | 1 | ☐ | |
| **2 Age Discrimination** | AgeDiscrimination | **8** | **5** | **0** | ☐ | If you expect the case team to gr |
| **2.1** Hawkins Specific | HawkinsSpecific | 6 | 4 | 0 | ☐ | |
| **2.2** Pattern & Practice | Pattern&Practice | 1 | 1 | 0 | ☐ | |
| **3 Retaliation** | Retaliation | **6** | **5** | **0** | ☐ | |
| **3.1** Transfer | Transfer | 1 | 1 | 0 | ☐ | |
| **3.2** Demotion | Demotion | 3 | 2 | 0 | ☐ | |
| **4** Deserved Termination | DeservedTermination | 4 | 3 | 1 | ☐ | Even though Philip Hawkins wasr |
| **5** rrtyrery | Rrtyrery | 0 | 0 | 0 | ☐ | |
| **6 Damages** | Damages | **5** | **1** | **1** | ☐ | |
| **6.1** Failure to Mitigate | FailureToMitigate | 4 | 1 | 1 | ☐ | |
| **6.2** Lost Wages | LostWages | 1 | 0 | 1 | ☐ | |
| **6.3** Mental Anguish | MentalAnguish | 3 | 1 | 1 | ☐ | |

We recommend you start with a high-level outline (three main levels) until you understand what issues need to be tracked. You can add additional issues and sub-issues as the case evolves. Doing so keeps your case data simplified and easier to manage over time.

## ⊟ Understand how # Fields work

The Issues spreadsheet contains numerous # Fields (a.k.a. Link Summary fields). Each # Field calculates the number of case knowledge elements linked to both the parent and child issues.

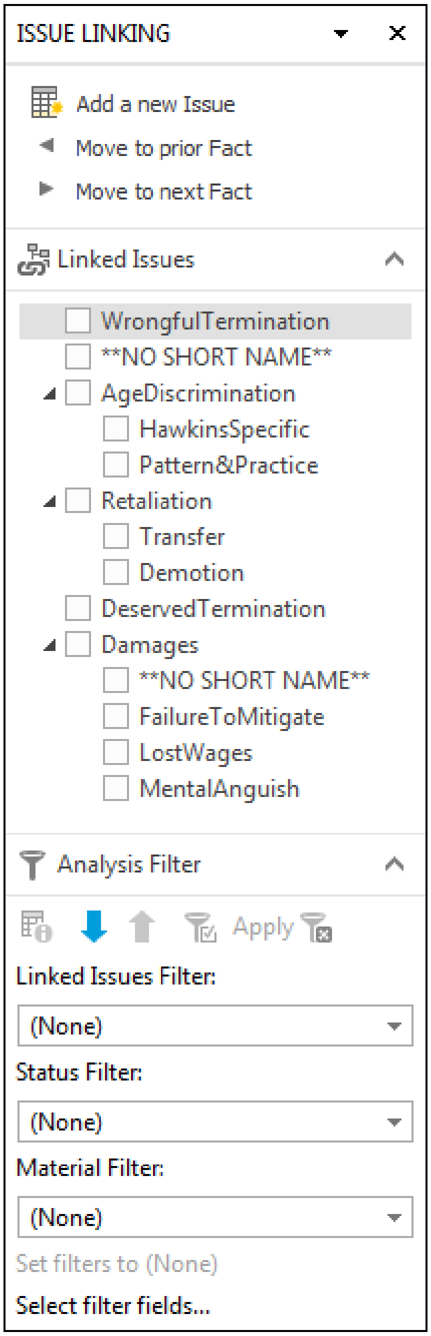
For example, when facts, documents, people, questions, and research are linked to a sublevel issue, CaseMap still counts it as being linked to the parent issue as well. The # Facts field automatically populates with numbers when you use the Issue Linker tool on the Facts spreadsheet to link facts to issues.

Once you link issues to facts, objects, etc., you can click on the Ellipsis button in a # Field cell to view a list dialog box of items distinct to that issue. You can also review, print or print to PDF the content in the list dialog box as needed.

## ⊟ Use the Issue Linking pane to link case elements

The Issue Linking pane is used to quickly link facts, objects, questions, and research authorities to issues.

Click on the Issue Linking button on the Home ribbon from one of these respective spreadsheets. The pane displays to the right of the spreadsheet. For each selected record, select an issue check box to link the case elements together. You can select multiple issues for each record.


ISSUE LINKING
Add a new Issue
Move to prior Fact
Move to next Fact
Linked Issues
☐ WrongfulTermination
☐ **NO SHORT NAME**
☐ AgeDiscrimination
☐ HawkinsSpecific
☐ Pattern&Practice
☐ Retaliation
☐ Transfer
☐ Demotion
☐ DeservedTermination
☐ Damages
☐ **NO SHORT NAME**
☐ FailureToMitigate
☐ LostWages
☐ MentalAnguish
Analysis Filter
Apply

Linked Issues Filter: (None)

Status Filter: (None)

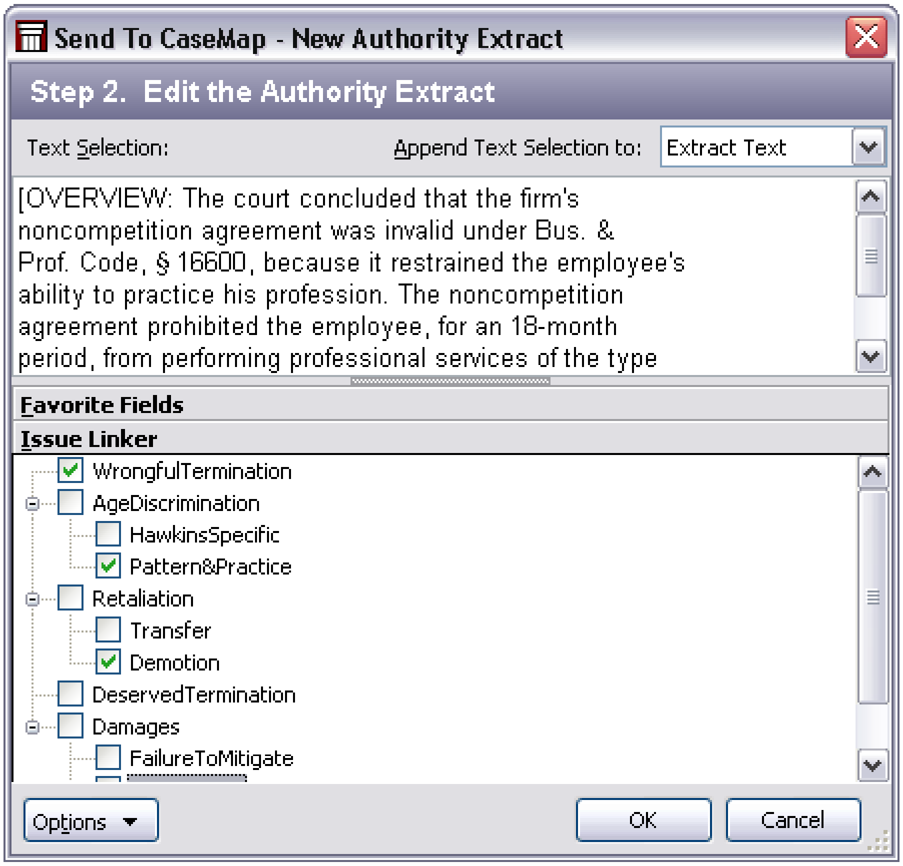
Material Filter: (None)

Set filters to (None)
Select filter fields...

For more information, see Creating outlines.

### ⊟ Use the Issue Linker pane when importing data

Case content may also be linked directly to issues when it is imported from another application (such as Acrobat PDF files) using the Send To CaseMap utility.


Send To CaseMap - New Authority Extract
Step 2. Edit the Authority Extract
Text Selection:
Favorite Fields
Issue Linker
Options
OK
Cancel

Append Text Selection to: Extract Text

[OVERVIEW: The court concluded that the firm's noncompetition agreement was invalid under Bus. & Prof. Code, § 16600, because it restrained the employee's ability to practice his profession. The noncompetition agreement prohibited the employee, for an 18-month period, from performing professional services of the type

- ☑ WrongfulTermination
- ☐ AgeDiscrimination
  - ☐ HawkinsSpecific
  - ☑ Pattern&Practice
- ☐ Retaliation
  - ☐ Transfer
  - ☑ Demotion
- ☐ DeservedTermination
- ☐ Damages
  - ☐ FailureToMitigate

For more information, see the Importing PDFs or Entering research help topic.

## Use the Bulk Issue Linker to link multiple records to issues

Instead of linking each record individually to issues, you can use the Bulk Issue Linker to link multiple case records to one or more issues at a time.

For more information, see Using the Bulk Issue Linker.

Related Topics

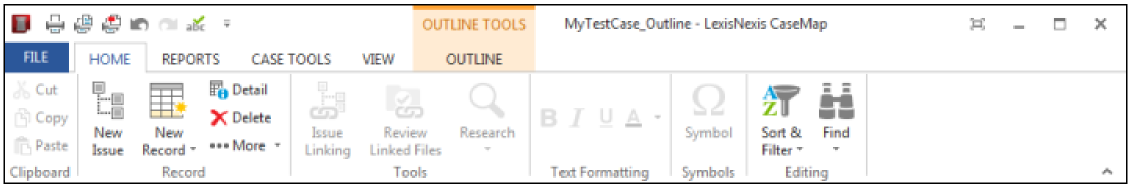
About entering data
Creating outlines

### *Creating outlines*

When you first create an issues outline in the Issues spreadsheet, you can choose to enter all primary issues first and add sub-level issues later. Or you can enter them all at one time. It's easy to insert a new record or reorganize issues and sublevel issues in the spreadsheet.

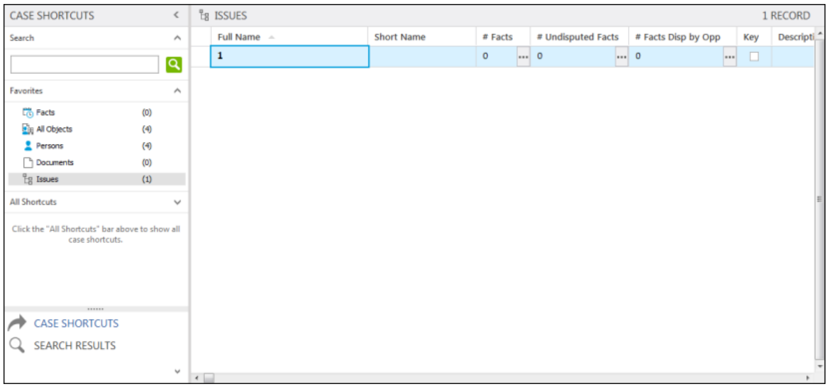
## ⊟ Create an initial issues outline

1. Open/create the new case.


OUTLINE TOOLS
MyTestCase_Outline - LexisNexis CaseMap
FILE
HOME
REPORTS
CASE TOOLS
VIEW
OUTLINE
Cut
Copy
Paste
Clipboard
New Issue
New Record
Detail
Delete
More
Record
Issue Linking
Review Linked Files
Research
Tools
B I U A
Text Formatting
Symbol
Symbols
Sort & Filter
Find
Editing

2. On the **Home** ribbon, click the **New Record** button, and then click **Issue**.

   A blank issues record automatically displays in the spreadsheet for you to start entering data.


CASE SHORTCUTS
Search
Favorites
Facts (0)
All Objects (4)
Persons (4)
Documents (0)
Issues (1)
All Shortcuts
Click the "All Shortcuts" bar above to show all case shortcuts.
CASE SHORTCUTS
SEARCH RESULTS
ISSUES
1 RECORD
Full Name
Short Name
# Facts
# Undisputed Facts
# Facts Disp by Opp
Key
Descripti
1
0
0
0

3. In the **Full Name** cell, type in the full name of the first issue.
4. Press **Tab** to navigate to the next cell.

   Notice how the Short Name cell automatically fills in for you.
5. Optional: Click the **New Record** button and click **Issue**.

   You can also press the Insert key to add a new record.
6. Continue entering all primary level issues in this manner.

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

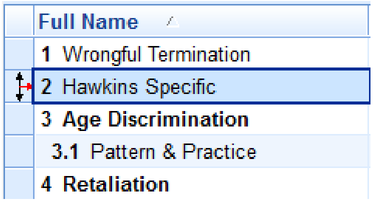
## ⊟ To enter sub-level issues

1. In the **Issues** spreadsheet, highlight the primary issue for which you want to add sub-level issues.
2. Click the **New Record** button and click **Issue**.

You can also press the Insert key to add a new record.

3. In the **Full Name** cell, type in the full name of the sub-level issue.

4. Click on the arrow pointing to the right to make this record a sub-level issue.



Full Name

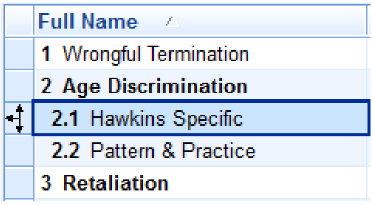
1 Wrongful Termination

2 Hawkins Specific

3 Age Discrimination

3.1 Pattern & Practice

4 Retaliation



Full Name

1 Wrongful Termination

2 Age Discrimination

2.1 Hawkins Specific

2.2 Pattern & Practice

3 Retaliation

Notice that the arrow highlights in red to indicate which direction you are moving the record within the spreadsheet.

The sub-level issue is now indented and follows a secondary outline numbering scheme, and the Short Name cell is automatically filled in.

5. Continue entering all sub-level issues in this manner.

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

After you create your initial issue outline, you can link issues using 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 Issue Linker pane in the Send To CaseMap utility.

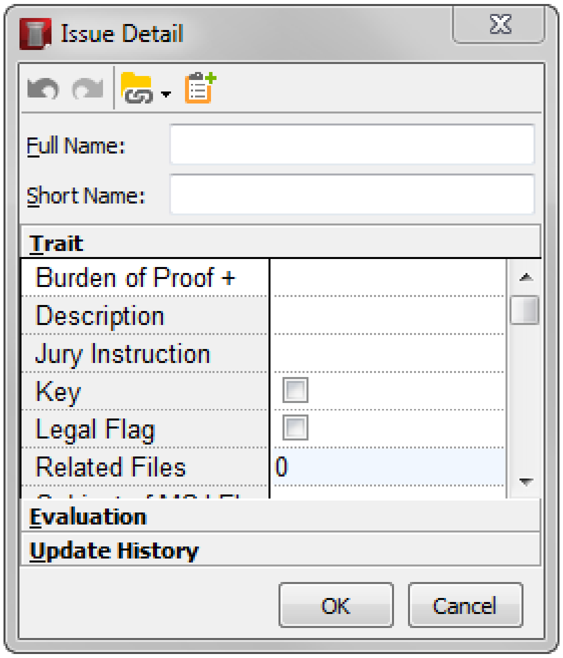
# Fields all display zeros until issues are linked with other case elements (facts, objects, questions, research).

### To enter issues in the Issue Linking pane

1. On the **Home** ribbon, click **Issue Linking** to open the **Issue Linking** pane.

Click on another spreadsheet type (e.g., Documents) under Favorites on the Navigation pane if the Issue Linking button on Home ribbon is not active.

2. In the **Issue Linking** pane, click **Add a new Issue** to open the **Issue Detail** box.


Issue Detail
Full Name:
Short Name:
Trait
Burden of Proof +
Description
Jury Instruction
Key
Legal Flag
Related Files
0
Evaluation
Update History
OK
Cancel

3. In the **Full Name** field, type the full name of the new issue.
4. Press **Tab**.

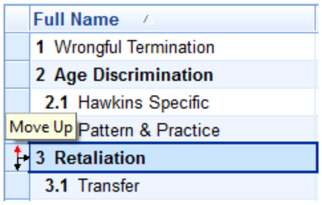
   Notice how the Short Name field automatically fills in for you.
5. Click **OK** to save the issue.

   The new issue now displays in the Issue Linking pane under Linked Issues, and at the bottom of the issues list in the Issues spreadsheet.
6. In the **Navigation** pane, click Issues, under the **Favorites** heading.

> If you need to move this issue in the outline or make it a sub-level issue, you need to do so in the Issues spreadsheet.

### ⊟ To promote/demote issues (outline adjustments)

1. In the **Issues** spreadsheet, click on the issue you want to move.
2. Click on the arrow point (**Move Up**, **Demote**, or **Move Down**) in the direction you want to move the issue.



| Full Name |
|---|
| 1 Wrongful Termination |
| 2 Age Discrimination |
| 2.1 Hawkins Specific |
| 2.2 Pattern & Practice |
| 3 Retaliation |
| 3.1 Transfer |

Notice that the arrow highlights in red to indicate which direction you are moving the record within the spreadsheet.

3. Click on the arrow point until the issue moves to the location you want it in the spreadsheet.

### To delete issues

1. In the **Issues** spreadsheet, click to select the issue record you want to delete.
2. Click the **Delete Record** button on the **Standard** toolbar.

   The issue record is now permanently deleted from the case.

⚠ When you delete an issue record, you also delete links between the issue and any associated case elements. Be sure to make note of any linked records prior to deleting an issue, if you want to track that information for reference purposes.

Related Topics

About issues
Analyzing and linking facts
About linking
Using the Bulk Issue Linker

### *Entering issues*

When you first create an issue outline in the Issues spreadsheet, you can choose to enter all primary issues first and add sub-level issues later. Or you can enter them all at one time. It's easy to insert a new record or reorganize issues and sublevel issues in the spreadsheet.

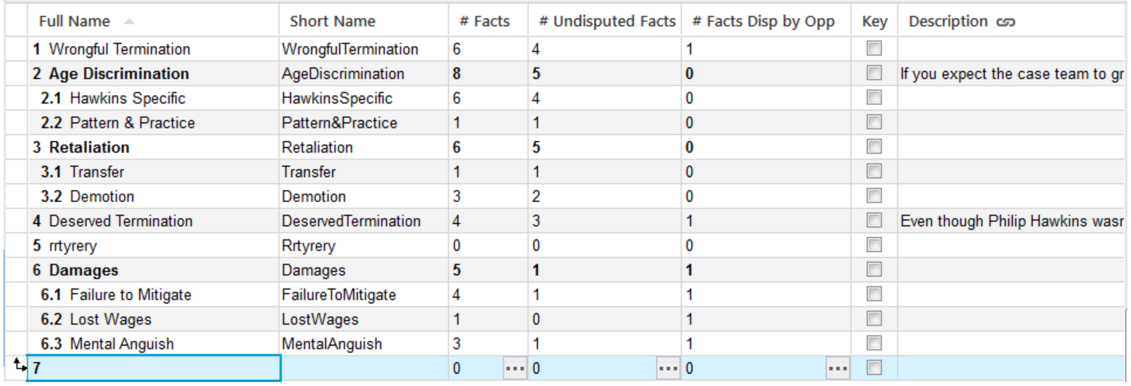
After you create your initial issue outline, you have the option to add new issues in the Issue Linking pane, which is accessible from each spreadsheet. If data is imported from other applications using the Send To feature in CaseMap, you can link content to data using the Issue Linker pane in the Send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

# Fields all display zeros until issues are linked with other case elements (facts, objects, questions, research).

### To enter primary issues

1. On the **Home** tab, click the **New Record** button, and then click **Issue**.

   A blank issues record automatically displays in the spreadsheet for you to start entering data.



| | Full Name | Short Name | # Facts | # Undisputed Facts | # Facts Disp by Opp | Key | Description |
|---|---|---|---|---|---|---|---|
| | 1 Wrongful Termination | WrongfulTermination | 6 | 4 | 1 | ☐ | |
| | **2 Age Discrimination** | AgeDiscrimination | **8** | **5** | **0** | ☐ | If you expect the case team to gr |
| | 2.1 Hawkins Specific | HawkinsSpecific | 6 | 4 | 0 | ☐ | |
| | 2.2 Pattern & Practice | Pattern&Practice | 1 | 1 | 0 | ☐ | |
| | **3 Retaliation** | Retaliation | **6** | **5** | **0** | ☐ | |
| | 3.1 Transfer | Transfer | 1 | 1 | 0 | ☐ | |
| | 3.2 Demotion | Demotion | 3 | 2 | 0 | ☐ | |
| | 4 Deserved Termination | DeservedTermination | 4 | 3 | 1 | ☐ | Even though Philip Hawkins wasr |
| | 5 rrtyrery | Rrtyrery | 0 | 0 | 0 | ☐ | |
| | **6 Damages** | Damages | **5** | **1** | **1** | ☐ | |
| | 6.1 Failure to Mitigate | FailureToMitigate | 4 | 1 | 1 | ☐ | |
| | 6.2 Lost Wages | LostWages | 1 | 0 | 1 | ☐ | |
| | 6.3 Mental Anguish | MentalAnguish | 3 | 1 | 1 | ☐ | |
| | 7 | | 0 ... | 0 ... | 0 ... | ☐ | |

2. In the **Full Name** cell, type in the full name of the first issue.

3. Press **Tab** to navigate to the next cell.

   Notice how the Short Name cell automatically fills in for you.

4. Optional: Click the **New Record** button and click **Issue**.

   You can also press the Insert key to add a new record.

5. Continue entering all primary level issues in this manner.

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

## To enter sub-level issues

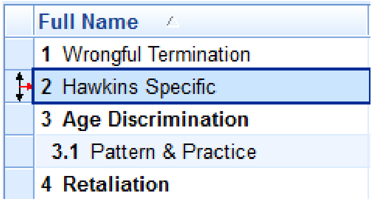
1. In the **Issues** spreadsheet, highlight the primary issue for which you want to add sub-level issues.

2. Click the **New Record** button and click **Issue**.

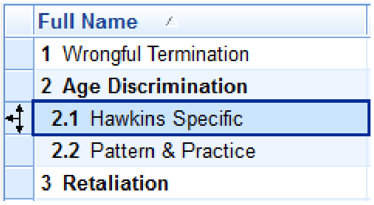
   You can also press the Insert key to add a new record.

3. In the **Full Name** cell, type in the full name of the sub-level issue.

4. Click on the arrow pointing to the right to make this record a sub-level issue.



| Full Name |
|---|
| 1 Wrongful Termination |
| 2 Hawkins Specific |
| **3 Age Discrimination** |
| 3.1 Pattern & Practice |
| **4 Retaliation** |



| Full Name |
|---|
| 1 Wrongful Termination |
| **2 Age Discrimination** |
| 2.1 Hawkins Specific |
| 2.2 Pattern & Practice |
| **3 Retaliation** |

   Notice that the arrow highlights in red to indicate which direction you are moving the record within the spreadsheet.

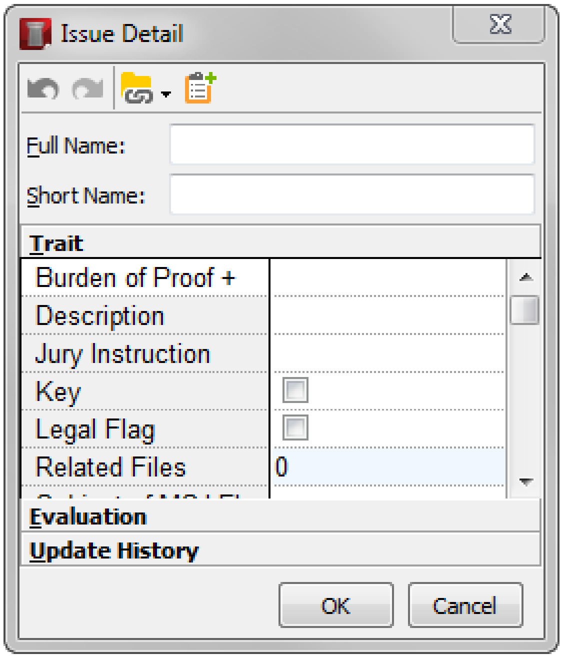
   The sub-level issue is now indented and follows a secondary outline numbering scheme, and the Short Name cell is automatically filled in.

5. Continue entering all sub-level issues in this manner.

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

## To enter issues in the Issue Linking pane

1. On the **Home** tab, click **Issue Linking** to open the **Issue Linking** pane.
2. Click **Add a new Issue** to open the **Issue Detail** box.


Issue Detail
Full Name:
Short Name:
Trait
Burden of Proof +
Description
Jury Instruction
Key
Legal Flag
Related Files
0
Evaluation
Update History
OK
Cancel

3. In the **Full Name** field, type the full name of the new issue.
4. Press **Tab**.

   Notice how the Short Name field automatically fills in for you.

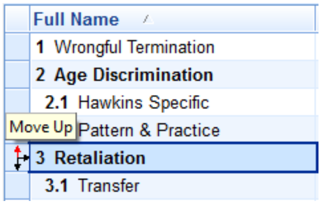
5. Click **OK** to save the issue.

   The new issue now displays at the bottom of the issues list in the Issues spreadsheet.

> If you need to move this issue in the outline or make it a sub-level issue, you need to do so in the Issues spreadsheet.

## To promote/demote issues

1. In the **Issues** spreadsheet, click on the issue you want to move.
2. Click on the arrow point (**Move Up**, **Demote**, or **Move Down**) in the direction you want to move the issue.


Full Name
1 Wrongful Termination
2 Age Discrimination
2.1 Hawkins Specific
Move Up
Pattern & Practice
3 Retaliation
3.1 Transfer

Notice that the arrow highlights in red to indicate which direction you are moving the record within the spreadsheet.

3. Click on the arrow point until the issue moves to the location you want it in the spreadsheet.

⊟ To delete issues

1. In the **Issues** spreadsheet, click to select the issue record you want to delete.
2. Click the **Delete Record** button on the **Standard** toolbar.

   The issue record is now permanently deleted from the case.

⚠ When you delete an issue record, you also delete links between the issue and any associated case elements. Be sure to make note of any linked records prior to deleting an issue, if you want to track that information for reference purposes.

Related Topics

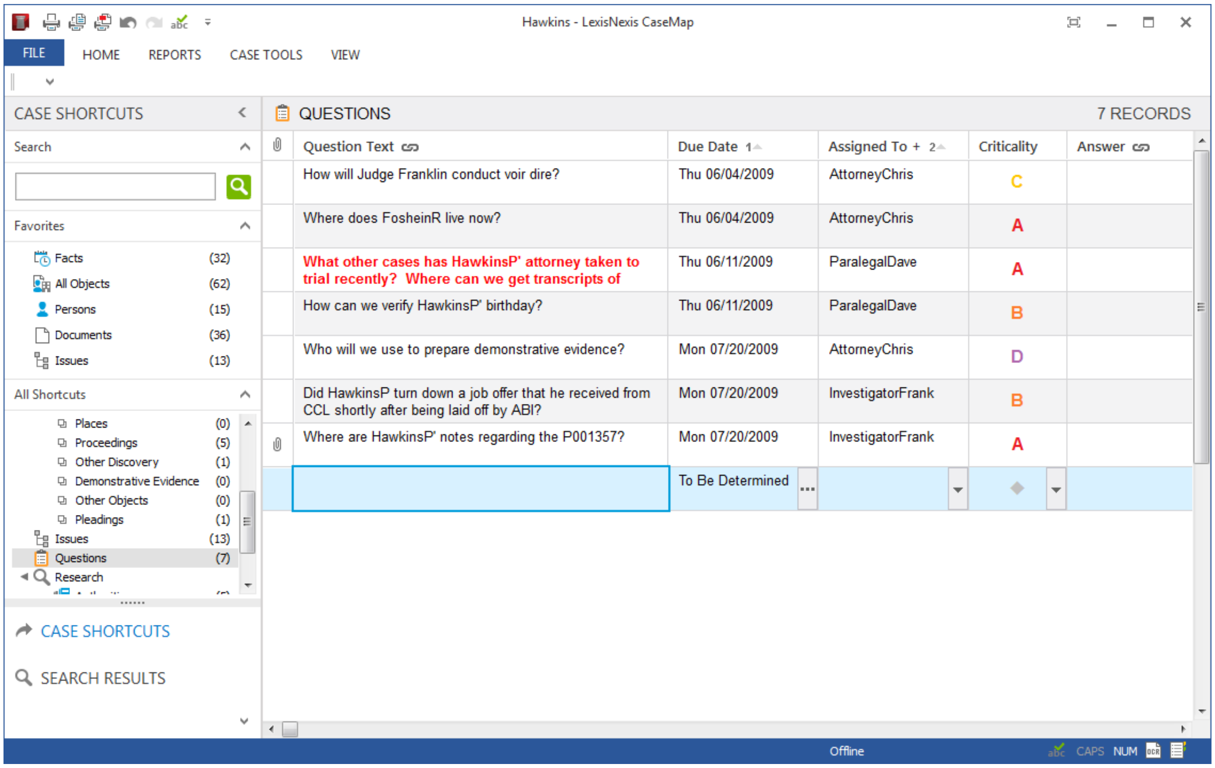
About issues
Using the Bulk Issue Linker

## Entering Questions

### *About questions*

The Questions spreadsheet is your overall "To Do" list for everything you need to accomplish before trial and at the end of discovery. Use this spreadsheet to assign tasks to case staff, track unanswered questions regarding the case, and enter questions for witnesses during depositions.

When case staff access the case, they can review the Questions spreadsheet to quickly gain an overall view of case progress as well as find tasks assigned to them so they can start working.


Hawkins - LexisNexis CaseMap
FILE
HOME
REPORTS
CASE TOOLS
VIEW
CASE SHORTCUTS
Search
Favorites
Facts (32)
All Objects (62)
Persons (15)
Documents (36)
Issues (13)
All Shortcuts
Places (0)
Proceedings (5)
Other Discovery (1)
Demonstrative Evidence (0)
Other Objects (0)
Pleadings (1)
Issues (13)
Questions (7)
Research
CASE SHORTCUTS
SEARCH RESULTS
QUESTIONS
7 RECORDS
Offline
CAPS
NUM

| Question Text | Due Date 1 | Assigned To + 2 | Criticality | Answer |
|---|---|---|---|---|
| How will Judge Franklin conduct voir dire? | Thu 06/04/2009 | AttorneyChris | C | |
| Where does FosheinR live now? | Thu 06/04/2009 | AttorneyChris | A | |
| **What other cases has HawkinsP' attorney taken to trial recently? Where can we get transcripts of** | Thu 06/11/2009 | ParalegalDave | A | |
| How can we verify HawkinsP' birthday? | Thu 06/11/2009 | ParalegalDave | B | |
| Who will we use to prepare demonstrative evidence? | Mon 07/20/2009 | AttorneyChris | D | |
| Did HawkinsP turn down a job offer that he received from CCL shortly after being laid off by ABI? | Mon 07/20/2009 | InvestigatorFrank | B | |
| Where are HawkinsP' notes regarding the P001357? | Mon 07/20/2009 | InvestigatorFrank | A | |
| | To Be Determined | | | |

## Questions Spreadsheets Overview

Assign questions or tasks to members of the trial or investigative teams

Use the Due Date field to monitor the status of questions. This field is the default sort field on the Questions spreadsheet..

Categorize entries by how critical they are, or by answer status.

Document answers and task resolutions for reference purposes.

Enter questions in the Questions spreadsheet, or from another spreadsheet (like Facts and Documents) using the Insert > Add Questions menu option to open the Question Detail dialog box.

Insert the Linked Elements field to view fact text linked to questions.

Insert the # Questions field into a spreadsheet that has questions linked to records. By doing so, you will have instant access to a list dialog box of linked Questions.

Related Topics

About entering data

Entering questions
Analyzing and linking questions

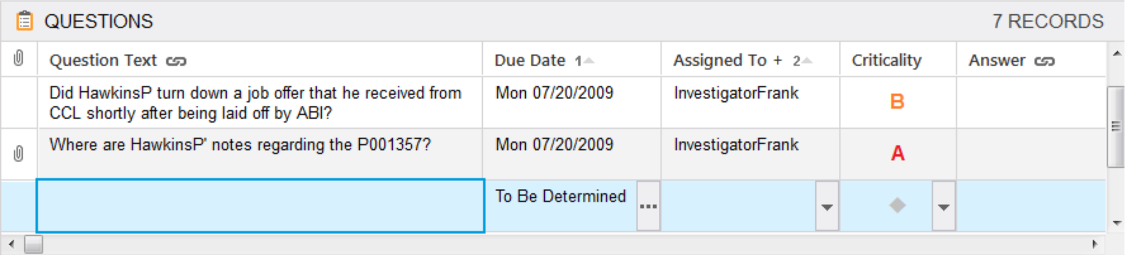
### *Entering questions*

When you first start a case, you want to enter questions that are standard tasks that need to be tracked for each case and/or any generic questions you have that are applicable to specific case types. As the case evolves, you can then add more case specific questions and tasks. You also have the option of entering questions directly from the Facts spreadsheet if something occurs to you while entering or analyzing case information.

If you have a list of questions that you want to use for each case, save them in a case template that can be imported into a new case.

### To enter questions in the Questions spreadsheet

1. On the **Home** tab, click the **New Record** button, and the click **Question**.

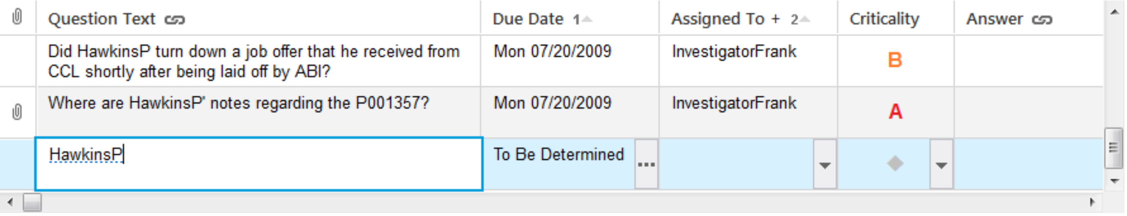


QUESTIONS 7 RECORDS

| 📎 | Question Text | Due Date 1 | Assigned To + 2 | Criticality | Answer |
|---|---|---|---|---|---|
| | Did HawkinsP turn down a job offer that he received from CCL shortly after being laid off by ABI? | Mon 07/20/2009 | InvestigatorFrank | B | |
| 📎 | Where are HawkinsP' notes regarding the P001357? | Mon 07/20/2009 | InvestigatorFrank | A | |
| | | To Be Determined | | ◆ | |

2. In the **Question** text cell, type in the question.

   Notice that if you type question text using short names (e.g, ThomasK, indicated by dotted underline), you will automatically link the question record to an object (such as a person).



| 📎 | Question Text | Due Date 1 | Assigned To + 2 | Criticality | Answer |
|---|---|---|---|---|---|
| | Did HawkinsP turn down a job offer that he received from CCL shortly after being laid off by ABI? | Mon 07/20/2009 | InvestigatorFrank | B | |
| 📎 | Where are HawkinsP' notes regarding the P001357? | Mon 07/20/2009 | InvestigatorFrank | A | |
| | HawkinsP | To Be Determined | | ◆ | |

3. In the **Due Date** cell, type in the date the question should have an answer.

4. In the **Assigned To** cell, click or type the name of the person responsible for researching the question.

5. In the **Criticality** cell, click on the selection that best categorizes this question's importance.

6. In the **Answer Status** cell, leave the status as **Unaddressed** at this time.

   Notice that all questions default to a status of Unaddressed. When the team member assigned to the question starts to research this task, he or she can change the status to In Progress.

7. Click on the **New** button, and click **Questions** to continue entering question records.

   You can also press the Insert key to add a new blank record into a spreadsheet.

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

Related Topics

About questions
Analyzing and linking questions

## Entering Research

### *About research*

CaseMap has three research spreadsheets that store authority and extract data from Lexis Advance or other case law web sites. When you are gathering research from a web site, you can import the authorities and extracts directly into a case's research spreadsheets, setting a link from the research record to the web page where the content resides. You can also manually enter data in research spreadsheets and then attach source files (stored in a network folder) directly to the corresponding spreadsheet record.

***Research spreadsheets include:***

- **Authorities**: Track and organize your authorities by type and jurisdiction, and link the research directly to issues to support your case strategy.
- **Extracts from Authorities**: Track and organize extracts by entering summary descriptions and notes needed to track its relevance to the case.
- **Authorities and Extracts**: A split-screen view of both spreadsheets where you can view an authority and its associated extracts.

⚠ Attachments linked from Lexis Advance using the Send to CaseMap tool may be compromised when web site data is updated or refreshed. Additionally, links to web sites only reference the page you mark. The link does not return you to the excerpt of the authority you located.

We strongly recommend that any authorities included in your case are first saved as Adobe® Acrobat PDF files. You can store these files in network folders and attach the source file to the research record in the Research Authorities spreadsheet. You can then highlight extracts in the PDF file and send the data to the Research Extracts and

Authorities spreadsheet.

## Use Shepard's Citation Service to validate authorities

CaseMap integrates with the Shepard's Citations Service, a LexisNexis service that provides a comprehensive case citation and treatment history to verify the validity of case law, statutes, agency opinions, and other legal documents.

CaseMap's Research - Authorities spreadsheets provide an automatic look-up for Shepard's signals for case law citations when a case is opened. The Shepard's signal status displays for each case law citation in the Authorities spreadsheet.

For more information, see About Shepard's Signals.

## Conduct online case law research directly from CaseMap

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 analysis. Access to LexisNexis online research depends on whether you have subscribed to these services, such as Lexis Advance®, and others.

For more information, see About online research.

Related Topics

About entering data
Entering research
Analyzing and linking research

### *Entering research*

When first entering research in a new case, you have options for how you may want to proceed. Review each option and decide what works best for the case and case staff. Regardless of your choice, we recommend that you first enter/import research data into the Authorities spreadsheet to list case law, statutes, regulations, rulings, and articles you want to reference. Then extract passages that you want to track and copy in the Extracts from Authorities spreadsheet. Data entered in spreadsheet cells is automatically saved as you navigate to a new cell or record.

***You can enter research by:***

- Typing research data into spreadsheets (manually)
- Importing data from a case law web site (Send To feature)
- Importing data from research saved as PDF files (Send To feature)

⚠ Attachments linked from Lexis Advance using the Send to CaseMap tool may be compromised when web site data is updated or refreshed. Additionally, links to web sites only reference the page you mark. The link does not return you to the excerpt of the authority you located.

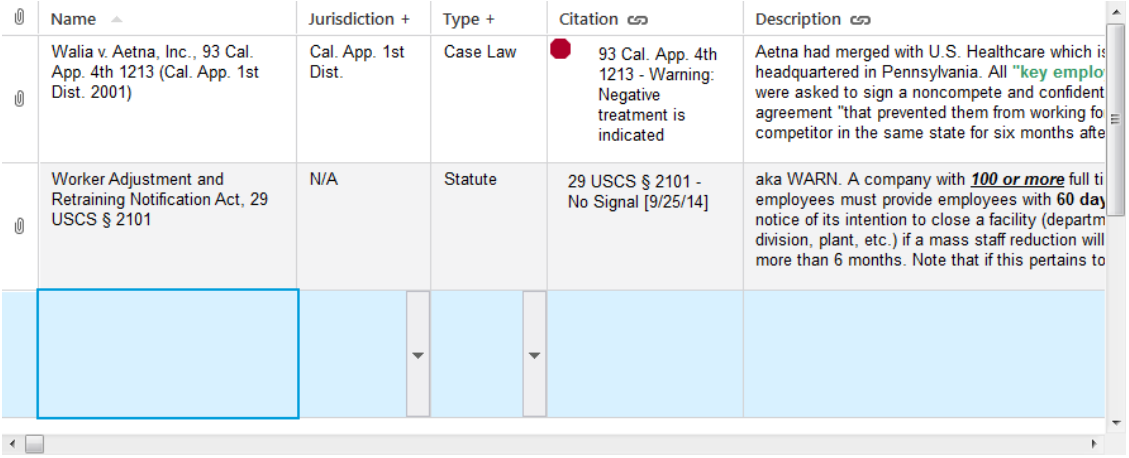
We strongly recommend that any authorities included in your case are first saved as Adobe® Acrobat PDF files. You can store these files in network folders and attach the source file to the research record in the Research Authorities spreadsheet. You can then highlight extracts in the PDF file and send the data to the Research Extracts and Authorities spreadsheet.

### ⊟ To manually enter research in the Authorities spreadsheet

1. On the **Home** ribbon, click the **New Record** button, and then click **Authority**.

   A blank record displays at the bottom of the spreadsheet.

2. In the **Name** cell, type in the name of the authority.



| | Name | Jurisdiction + | Type + | Citation | Description |
|---|---|---|---|---|---|
| | Walia v. Aetna, Inc., 93 Cal. App. 4th 1213 (Cal. App. 1st Dist. 2001) | Cal. App. 1st Dist. | Case Law | ● 93 Cal. App. 4th 1213 - Warning: Negative treatment is indicated | Aetna had merged with U.S. Healthcare which is headquartered in Pennsylvania. All "key emplo were asked to sign a noncompete and confident agreement "that prevented them from working fo competitor in the same state for six months afte |
| | Worker Adjustment and Retraining Notification Act, 29 USCS § 2101 | N/A | Statute | 29 USCS § 2101 - No Signal [9/25/14] | aka WARN. A company with ***100 or more*** full ti employees must provide employees with **60 day** notice of its intention to close a facility (departm division, plant, etc.) if a mass staff reduction will more than 6 months. Note that if this pertains to |
| | | | | | |

3. In the **Jurisdiction** cell, type in the jurisdiction from which the precedent came.

4. In the **Type** cell, click on the authority type or type a new entry to add to the list.

5. In the **Citation** cell, type in the citation for the authority.

   You can list multiple citations if needed.

6. In the **Description** cell, type in information defining the authority.

   If you type using short names in the Description or Notes cells, you will link the authority to an object (people, organizations, documents, etc.).

7. In the **Notes** cell, type in any more information regarding the authority.

8. Click the **New Record** button on the **Standard** toolbar, and then click **Research Authority**.

   Data entered in spreadsheet cells is automatically saved as you navigate to a new cell or record.

9. Continue entering research authority records as needed.

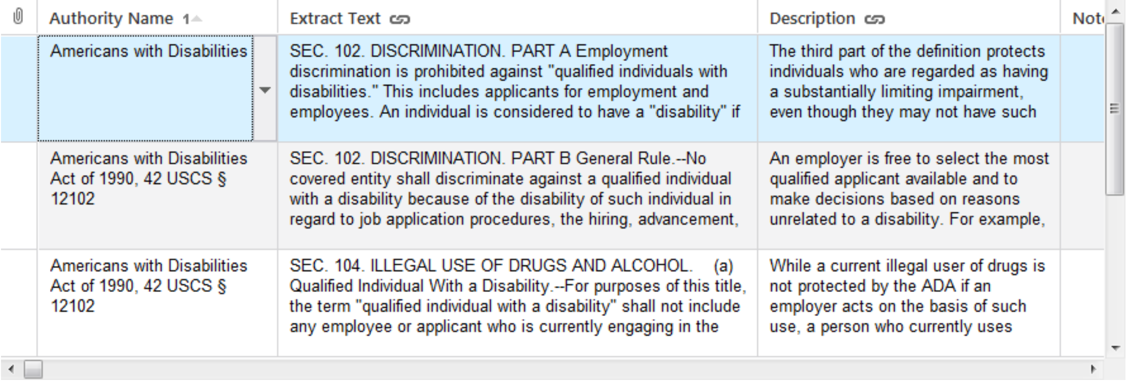
   You can also press the Insert key on the keyboard to add a new blank record into a spreadsheet.

For information on analyzing research data and using other fields in this spreadsheet, see [Analyzing and linking research](#).

### To manually enter research in the Extracts from Authorities spreadsheet

1. In the **Case Shortcuts** pane, click **Extracts from Authorities**, under **All Shortcuts**.

2. In the **Authority Name** cell, select the name of the authority from which the extract is being pulled by using the drop-down list.



| Authority Name 1 | Extract Text | Description | Not |
|---|---|---|---|
| Americans with Disabilities | SEC. 102. DISCRIMINATION. PART A Employment discrimination is prohibited against "qualified individuals with disabilities." This includes applicants for employment and employees. An individual is considered to have a "disability" if | The third part of the definition protects individuals who are regarded as having a substantially limiting impairment, even though they may not have such | |
| Americans with Disabilities Act of 1990, 42 USCS § 12102 | SEC. 102. DISCRIMINATION. PART B General Rule.--No covered entity shall discriminate against a qualified individual with a disability because of the disability of such individual in regard to job application procedures, the hiring, advancement, | An employer is free to select the most qualified applicant available and to make decisions based on reasons unrelated to a disability. For example, | |
| Americans with Disabilities Act of 1990, 42 USCS § 12102 | SEC. 104. ILLEGAL USE OF DRUGS AND ALCOHOL. (a) Qualified Individual With a Disability.--For purposes of this title, the term "qualified individual with a disability" shall not include any employee or applicant who is currently engaging in the | While a current illegal user of drugs is not protected by the ADA if an employer acts on the basis of such use, a person who currently uses | |

3. In the **Extract Text** cell, type in the extract text from the authority.

   You can also copy/paste extract text in this cell.

4. In the **Description** cell, type in information defining the authority extract.

   If you type using short names in the Description or Notes cells, you will link the authority to an object (people, organizations, documents, etc.).

5. In the **Notes** cell, type in any more information regarding the authority.

6. Click the **New Record** button on the **Standard** toolbar and then click **Research Authority Extract**.

   Data entered in spreadsheet cells is automatically saved as you navigate to a new cell or record.

7. Continue entering research authority records as needed.

   You can also press the Insert key to add a new blank record into a spreadsheet.

For information on analyzing research data and using other fields in this spreadsheet, see [Analyzing and linking research](#).

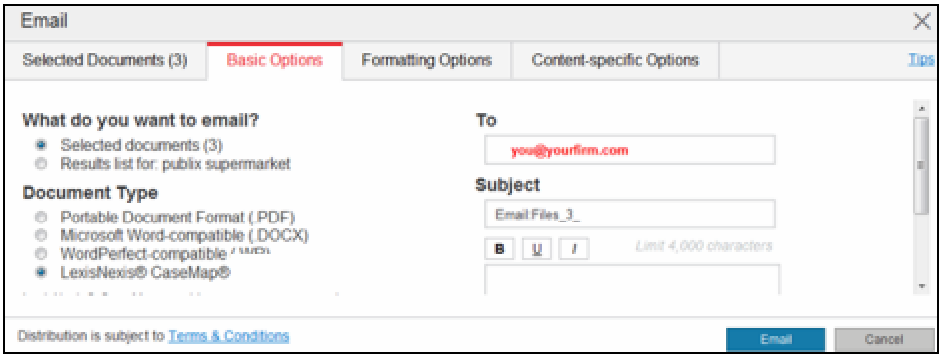
### To import research from a LexisNexis case law web site

1. Log on to [www.lexis Advance.com](#) to perform the search(es) you need to run.

2. In **Lexis Advance**, select the case(s) you want and then on the **Cases** menu, click the

**Email** button .

The Email dialog box displays.



What do you want to email?

● Selected documents (3)
○ Results list for: publix supermarket

Document Type

○ Portable Document Format (.PDF)
○ Microsoft Word-compatible (.DOCX)
○ WordPerfect-compatible (.WP)
● LexisNexis® CaseMap®

To: you@yourfirm.com

Subject: Email Files_3_

Distribution is subject to Terms & Conditions

3. Click the **Basic Options** tab after confirming the documents to be sent.
4. Under the **What do you want to email?** area, select the **Selected documents** radio button.
5. In the **To** field, enter the recipient's email address.
6. In the **Subject** field, enter the subject/name of the email to be sent.
7. Under the **Document Type** area, select **LexisNexis® CaseMap** ® and then click the **Email** button Email.

   Lexis Advance generates a CaseMap Document Package (.cmdocpkg) and a 'Delivery Complete' message when done.

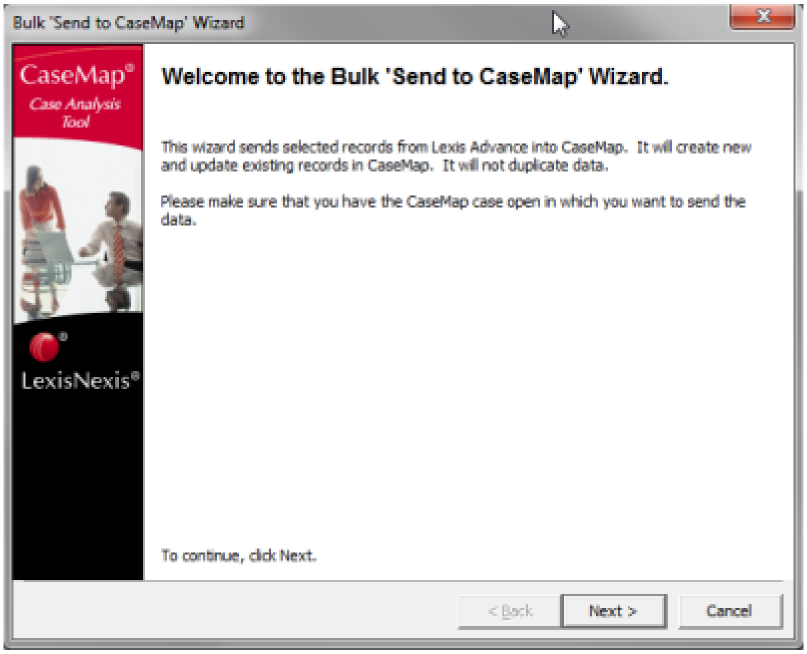
   The .cmdocpkg file contains document details (e.g., for case law: name, jurisdiction, citation, case summary, core terms) and a PDF of each selected document.

An email from Lexis Advance containing the .cmdocpkg file will be provided to the email recipient identified above.

8. Open the email received from Lexis Advance, and perform one of the following:
   - Select the **LexisNexis CaseMap Document Package** (.cmdocpkg file) and save it to a secure folder/location on your system.
   - Double-click on the **.cmdocpkg** file.

   The Bulk 'Send to CaseMap' Wizard displays.

   The Bulk 'Send to CaseMap' Wizard is used to import research into the Research - Authorities spreadsheet in your open case. CaseMap recognizes if a document already exist to avoid duplicates in the spreadsheet.


Bulk 'Send to CaseMap' Wizard
CaseMap® Case Analysis Tool
LexisNexis®
< Back
Next >
Cancel

Welcome to the Bulk 'Send to CaseMap' Wizard.

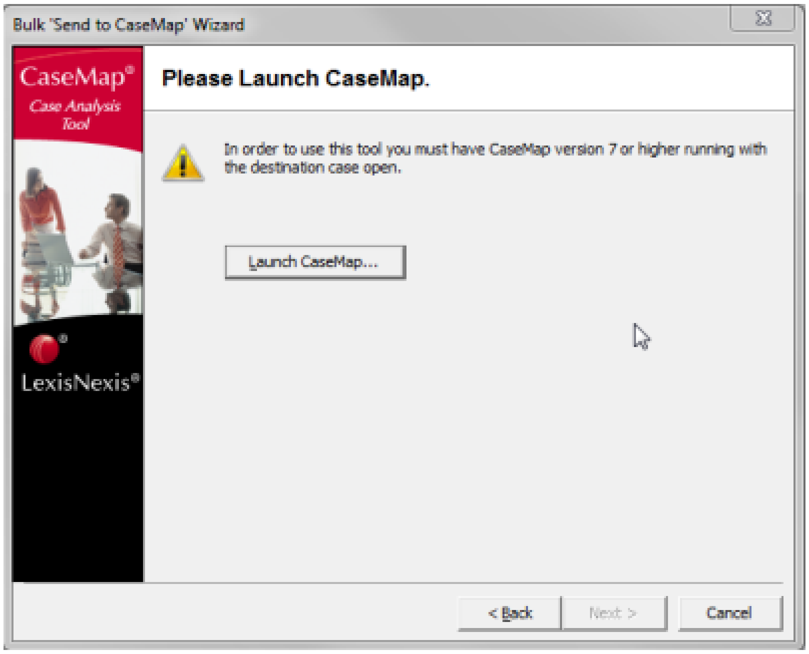
This wizard sends selected records from Lexis Advance into CaseMap. It will create new and update existing records in CaseMap. It will not duplicate data.

Please make sure that you have the CaseMap case open in which you want to send the data.

To continue, click Next.

9. When the **Welcome to Bulk 'Send to CaseMap' Wizard** opens, click **Next** to continue.

   The Launch CaseMap dialog box displays.


Bulk 'Send to CaseMap' Wizard
CaseMap® Case Analysis Tool
LexisNexis®
Launch CaseMap...
< Back
Next >
Cancel

Please Launch CaseMap.

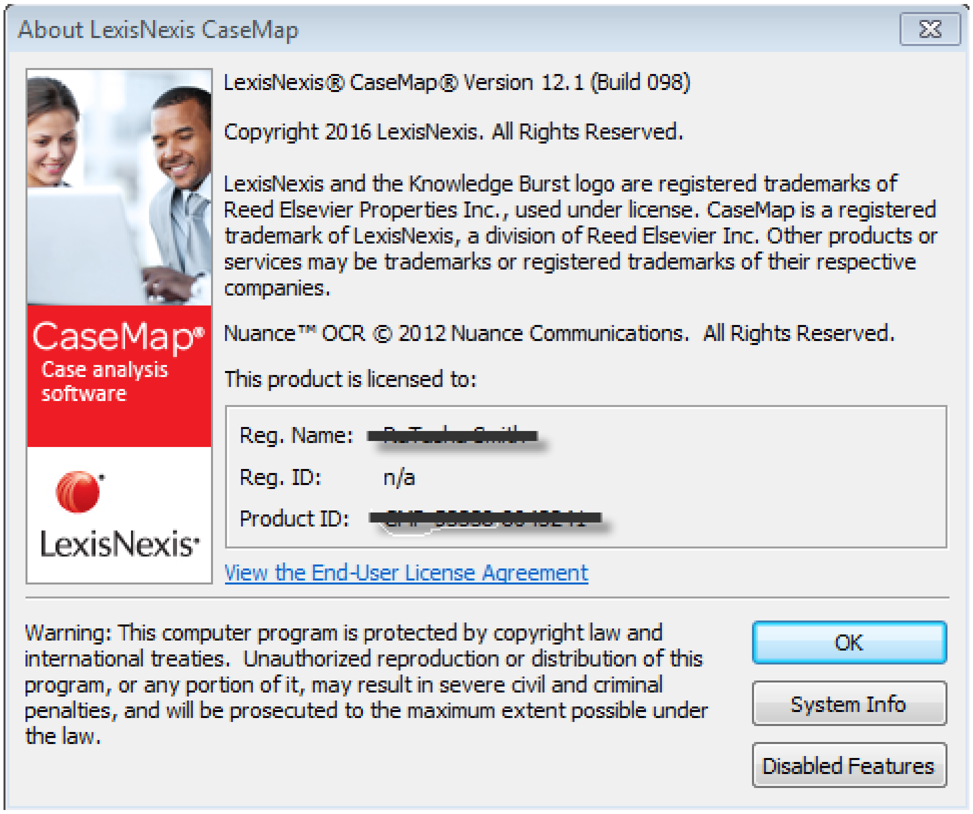
In order to use this tool you must have CaseMap version 7 or higher running with the destination case open.

10. Click the **Launch CaseMap** button to open the latest version of CaseMap installed on your system.

    Please verify your version of CaseMap before continuing.

a. On the **Getting Started** page, click Help & Info on the menu.

b. Under the **Product Information** area, click the **About CaseMap** button to display the **About LexisNexis CaseMap** dialog box.



LexisNexis® CaseMap® Version 12.1 (Build 098)

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Reg. ID: n/a
Product ID: [redacted]

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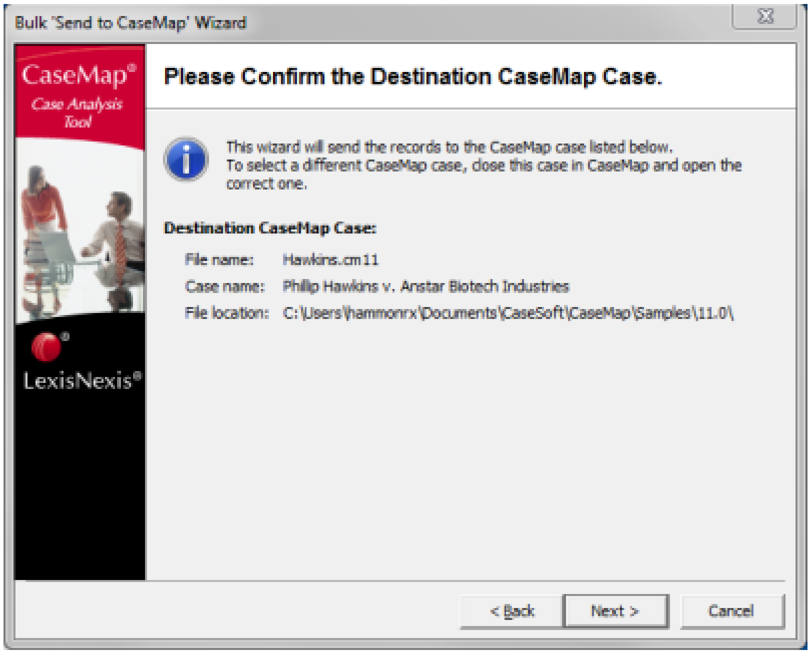
c. Click **OK** to close.

11. In the **Open a CaseMap case** dialog box, click the **Switch to CaseMap** button to bring CaseMap to the forefront.

12. In **CaseMap**, open the case that will receive the records.

    The Please Confirm the Destination CaseMap Case dialog box displays in the Bulk 'Send to CaseMap' Wizard.


Bulk 'Send to CaseMap' Wizard
CaseMap®
Case Analysis Tool
LexisNexis®
< Back
Next >
Cancel

Please Confirm the Destination CaseMap Case.

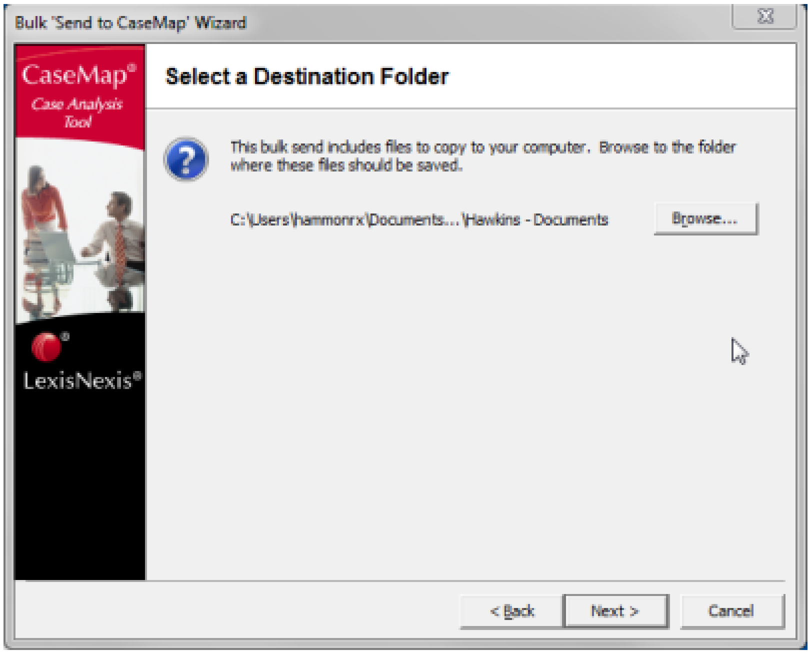
This wizard will send the records to the CaseMap case listed below.
To select a different CaseMap case, close this case in CaseMap and open the correct one.

**Destination CaseMap Case:**

File name: Hawkins.cm11
Case name: Philip Hawkins v. Anstar Biotech Industries
File location: C:\Users\hammonrx\Documents\CaseSoft\CaseMap\Samples\11.0\

13. In the **Please Confirm the Destination CaseMap Case** dialog box, verify the case receiving the records and then click **Next** to continue.

    The Select a Destination Folder dialog box displays.


Bulk 'Send to CaseMap' Wizard
CaseMap®
Case Analysis Tool
LexisNexis®
Browse...
< Back
Next >
Cancel

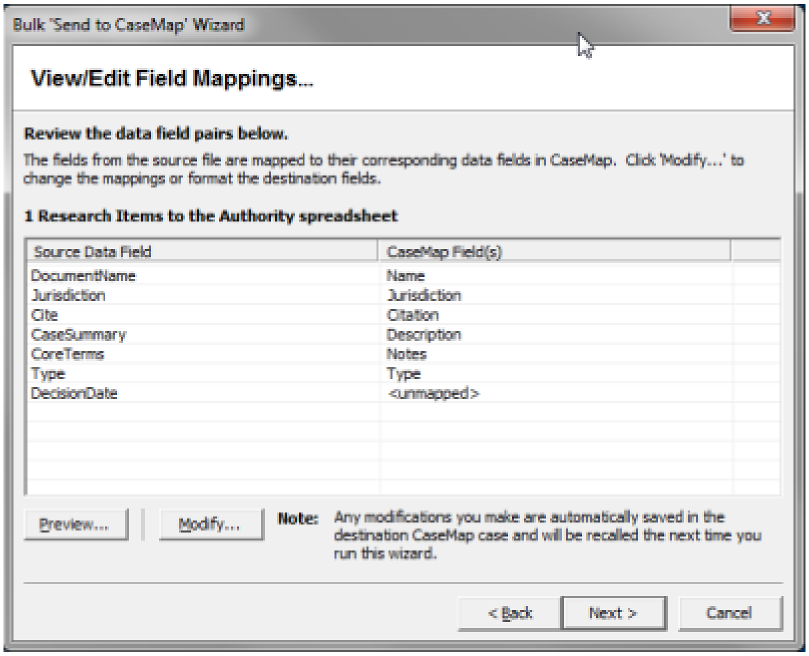
Select a Destination Folder

This bulk send includes files to copy to your computer. Browse to the folder where these files should be saved.

C:\Users\hammonrx\Documents...\Hawkins - Documents

14. Click the **Browse** button to select a folder where the records will be saved and then click **Next** to continue.

    The View/Edit Field Mappings dialog box displays. It allows you to preview, edit, and/or accept the preset default field mappings.



View/Edit Field Mappings...

**Review the data field pairs below.**

The fields from the source file are mapped to their corresponding data fields in CaseMap. Click 'Modify...' to change the mappings or format the destination fields.

**1 Research Items to the Authority spreadsheet**

| Source Data Field | CaseMap Field(s) |
|---|---|
| DocumentName | Name |
| Jurisdiction | Jurisdiction |
| Cite | Citation |
| CaseSummary | Description |
| CoreTerms | Notes |
| Type | Type |
| DecisionDate | <unmapped> |

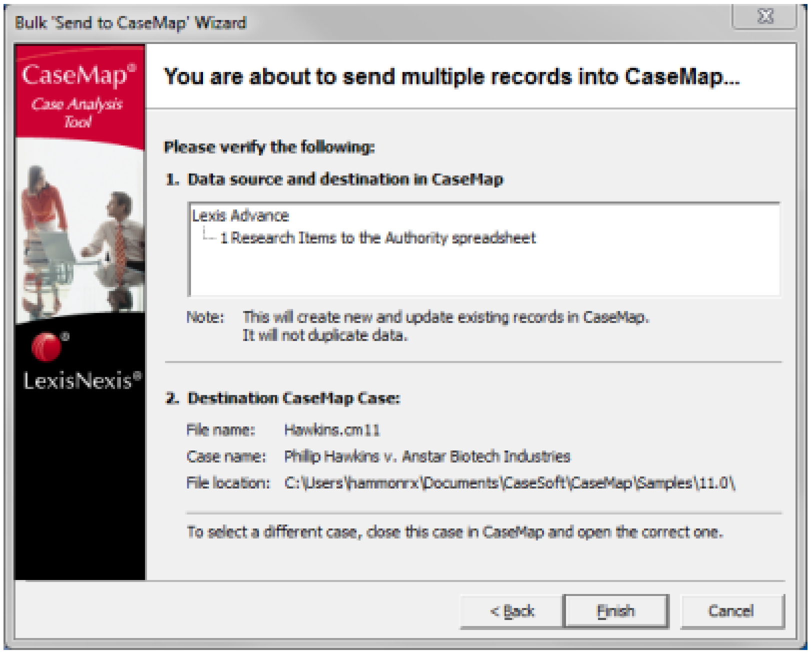
**Note:** Any modifications you make are automatically saved in the destination CaseMap case and will be recalled the next time you run this wizard.

15. Optional: Click the **Preview** button to display a data preview screen, and then click **Close** to continue.

16. Optional: Click the **Modify** button if you want to edit the default field mappings provided from Lexis Advance into CaseMap.

17. Click **Next** to accept default settings and to continue.

    The 'You are about to send multiple records into CaseMap' dialog box displays.



You are about to send multiple records into CaseMap...

**Please verify the following:**

**1. Data source and destination in CaseMap**

Lexis Advance
  1 Research Items to the Authority spreadsheet

Note: This will create new and update existing records in CaseMap. It will not duplicate data.

**2. Destination CaseMap Case:**

File name: Hawkins.cm11
Case name: Philip Hawkins v. Anstar Biotech Industries
File location: C:\Users\hammonrx\Documents\CaseSoft\CaseMap\Samples\11.0\

To select a different case, close this case in CaseMap and open the correct one.

18. Please verify the **Data source and destination in CaseMap** and **Destination CaseMap**

**Case**.

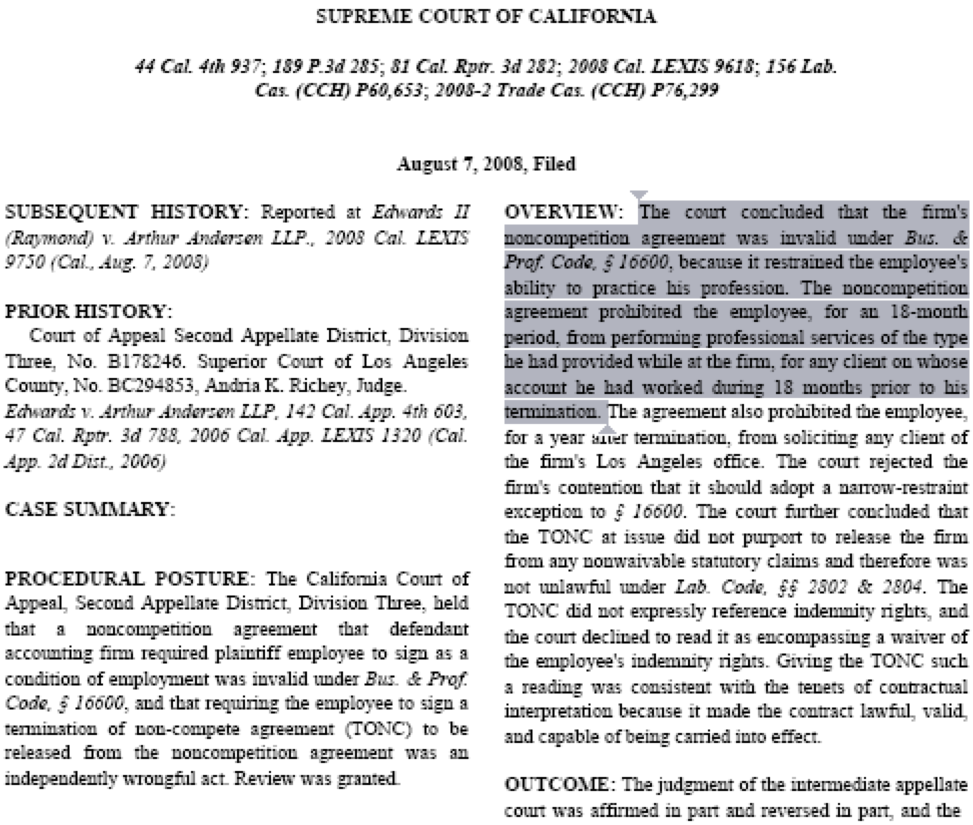
19. Optional: To select a different case, close this case in CaseMap and open the correct one.
20. In the **You are about to send multiple records into CaseMap** dialog box, click **Finish**.

    A Bulk Send to CaseMap message is displayed confirming the number of records that was added to the Research - Authorities spreadsheet in your open case in CaseMap.
21. Click **OK**.

For information on analyzing research data and using other fields in this spreadsheet, see Analyzing and linking research.

### ⊟ To import research saved as a PDF file

1. In the **Case Shortcuts** pane, click **Extracts from Authorities** in the **All Shortcuts** task pane.
2. Next, locate the authority in your case documents by navigating to research folder on your network.
3. Double-click on the **PDF** file to open it in Acrobat.
4. In **Acrobat**, click on the **Select** tool on the Standard toolbar and highlight the text you want to send to the Extracts from Authorities spreadsheet.



SUPREME COURT OF CALIFORNIA

*44 Cal. 4th 937; 189 P.3d 285; 81 Cal. Rptr. 3d 282; 2008 Cal. LEXIS 9618; 156 Lab. Cas. (CCH) P60,653; 2008-2 Trade Cas. (CCH) P76,299*

August 7, 2008, Filed

SUBSEQUENT HISTORY: Reported at *Edwards II (Raymond) v. Arthur Andersen LLP., 2008 Cal. LEXIS 9750 (Cal., Aug. 7, 2008)*

PRIOR HISTORY:
Court of Appeal Second Appellate District, Division Three, No. B178246. Superior Court of Los Angeles County, No. BC294853, Andria K. Richey, Judge.
*Edwards v. Arthur Andersen LLP, 142 Cal. App. 4th 603, 47 Cal. Rptr. 3d 788, 2006 Cal. App. LEXIS 1320 (Cal. App. 2d Dist., 2006)*

CASE SUMMARY:

PROCEDURAL POSTURE: The California Court of Appeal, Second Appellate District, Division Three, held that a noncompetition agreement that defendant accounting firm required plaintiff employee to sign as a condition of employment was invalid under *Bus. & Prof. Code, § 16600*, and that requiring the employee to sign a termination of non-compete agreement (TONC) to be released from the noncompetition agreement was an independently wrongful act. Review was granted.

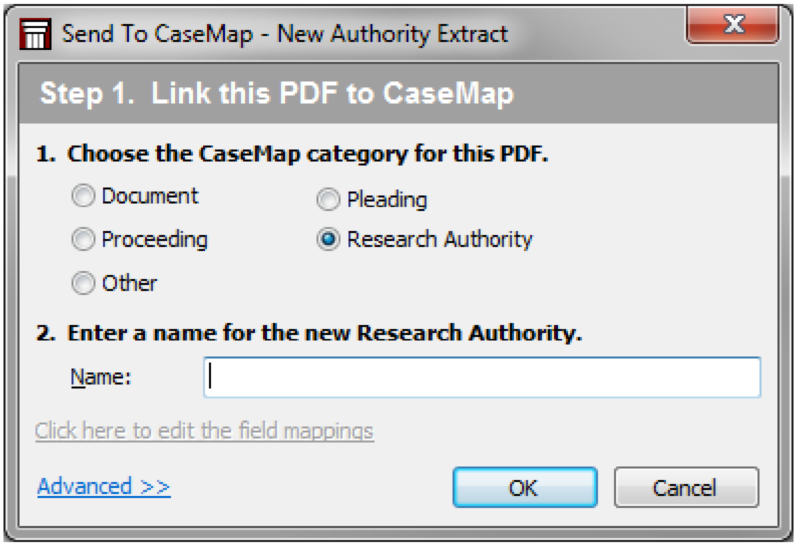
OVERVIEW: The court concluded that the firm's noncompetition agreement was invalid under *Bus. & Prof. Code, § 16600*, because it restrained the employee's ability to practice his profession. The noncompetition agreement prohibited the employee, for an 18-month period, from performing professional services of the type he had provided while at the firm, for any client on whose account he had worked during 18 months prior to his termination. The agreement also prohibited the employee, for a year after termination, from soliciting any client of the firm's Los Angeles office. The court rejected the firm's contention that it should adopt a narrow-restraint exception to *§ 16600*. The court further concluded that the TONC at issue did not purport to release the firm from any nonwaivable statutory claims and therefore was not unlawful under *Lab. Code, §§ 2802 & 2804*. The TONC did not expressly reference indemnity rights, and the court declined to read it as encompassing a waiver of the employee's indemnity rights. Giving the TONC such a reading was consistent with the tenets of contractual interpretation because it made the contract lawful, valid, and capable of being carried into effect.

OUTCOME: The judgment of the intermediate appellate court was affirmed in part and reversed in part, and the

5. Right-click on the highlighted text and select **Send Fact to CaseMap**.

   You can also click the Send Fact to CaseMap button.

6. In the **Send to CaseMap – New Fact** box, select the **Research Authority** option, then click **OK**.



Send To CaseMap - New Authority Extract

Step 1. Link this PDF to CaseMap

1. Choose the CaseMap category for this PDF.

○ Document ○ Pleading
○ Proceeding ● Research Authority
○ Other

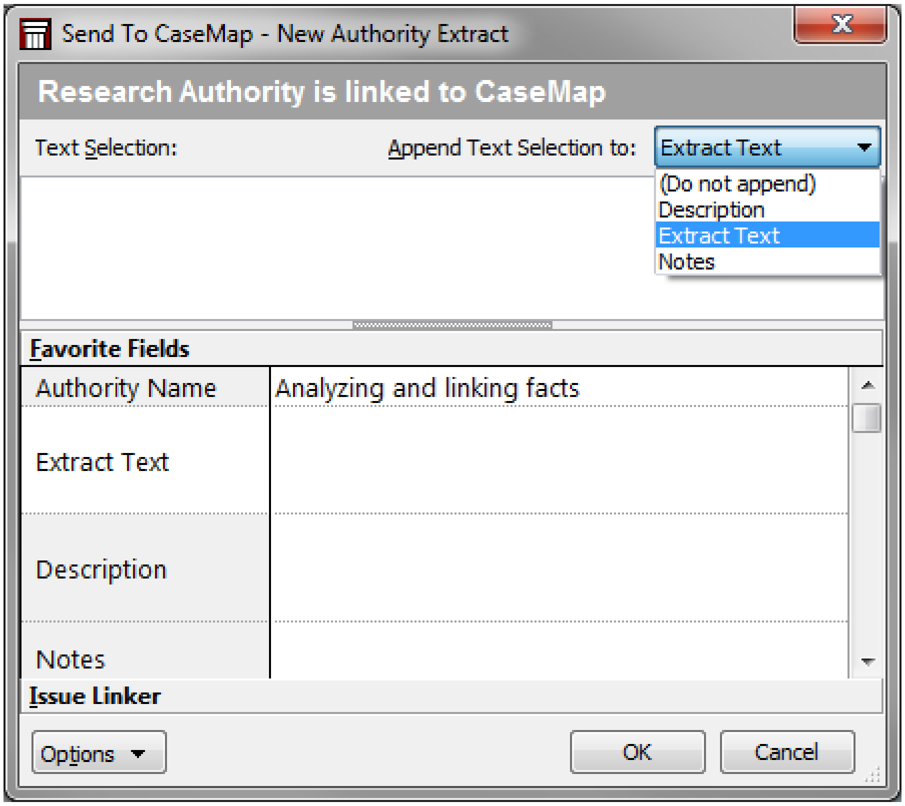
2. Enter a name for the new Research Authority.

Name:

   Notice that the PDF file name automatically displays in the Authority Name field.

   You can edit the file name here, if you want, before importing it into the case.

7. In the **Send to CaseMap – New Authority Extract** box, click **Extract Text** in the **Append Text Selection to** field.


Send To CaseMap - New Authority Extract
Research Authority is linked to CaseMap
Text Selection:
Append Text Selection to:
Extract Text
(Do not append)
Description
Extract Text
Notes
Favorite Fields
Issue Linker
Options
OK
Cancel

Authority Name: Analyzing and linking facts

8. In the **Text Selection** field, review the extract you highlighted in the PDF file.

   Notice that the text is now enclosed in brackets, indicating a link is set from the extract record to the source file.

   Notice that the file name is populated in the Authority Name field and the link's file path displays in the Linked File field.

9. Click on the **Issue Linker** bar at the bottom of the box and select check boxes for applicable issues to link this extract.

10. When you are finished, click **OK** to initiate the import process.

11. In the message prompt, click **Yes** to view the extract in the **Research – Extracts from Authorities** spreadsheet.

    Notice that the new record is automatically highlighted and sorted in with case records.

12. In the **All Shortcuts** pane, click the **Authorities** spreadsheet icon.

13. Locate the new authority record and fill in additional field information for this record.

    Click on To manually enter research in the Authorities spreadsheet and follow Steps 3-7 if needed.

14. Click on the paperclip icon to the left of the record to verify the attachment link to the source file.

For information on analyzing research data and using other fields in this spreadsheet, see

Analyzing and linking research.

Related Topics

About research
Analyzing and linking research
Changing research settings

## Using the Intake Interview Form

### *About the Intake Interview Form*

CaseMap's Intake Interview Form is the best means of gathering case information from a client from the onset. The template already contains instructions and guidelines to reference while you or a client fills in tables with details on people, organizations, rumors/facts/events related to the case. Once the form is completed, the content can be imported directly into the case automatically populating the All Objects and Facts spreadsheets. Use this template during client interviews or email it to clients and have them complete the form using Microsoft® Word. You can even customize it for your organization's needs.

Staff and clients must have Microsoft Word 2000 or later in order to use the form.

**⊟ Use the Intake Interview Form to save time gathering client information**

Once you or the client returns the form, you can import the information directly into CaseMap. Tables within the template are hard-coded so data automatically populates the All Objects spreadsheet (including sub-level) spreadsheets) and links related objects — saving you data entry time.

**⊟ Select five key parties for using the Intake Interview form**

Five interview forms can be imported into each case. Be sure to identify key parties in your case that information is best gathered by using the template. If you have more than five parties identified, you may need to enter that information manually. Or, you can enter more information to one of the other templates by adding rows to the tables.

**⊟ Use the Intake Form Checklist to help with data collection and import**

Reference the following checklist to ensure you are not forgetting any steps or tips in collecting data and modifying it before you import the content into the case.

| Checklist: Intake Interview Form | |
|---|---|
| | **Task** |
| ☐ | Did you customize the Intake Interview Form to accommodate your organization's needs?<br>* This is optional, but you can edit text and add corporate logos and content to adjust the template. Do not modify the tables or the data import won't work properly. You and clients can add/delete rows in the table. |
| ☐ | Did you identify five parties in the case for information gathering and importing using the template?<br>* CaseMap allows only five intake forms to be imported into each case. |
| ☐ | Did you email the template to the client and include any instructions needed to complete the form so information is gathered for the case according to your organization's needs? |
| ☐ | When the client returns the template, did you review the content for adequacy and accuracy? |
| ☐ | Best Practice — Did you remember to search/replace full names of objects with short names in the template before the import?<br>* For more information, see Replace full names with short names in the template, before the import. |
| ☐ | Did you review imported content in the case to ensure that the import was successful? |

## ⊟ Customize the Intake Interview Form for your organization's need

Customize the Intake Interview Form by editing content within the template and adding more information specific to your case or organization's needs. You can even rename the form for your organization.

The Intake Interview Form includes basic instructions and guidelines for filling out the template in a manner that imports data into the CaseMap case. The template also addresses essential information that needs to be gathered for any case. You can customize the guidelines to ask clients for specific information, while leaving the template instructions as is.

What you cannot customize is the basic structure of the tables, which must be remain in tact in order to be successfully imported back into a case in CaseMap. You cannot change the number of tables, the order of tables, or add/remove columns from any table. The only change that you or your clients can make to tables is to add/removes rows.

## ⊟ Replace full names with short names in the template, before the import

In order for linking to automatically generate for information imported from the Intake Interview Jumpstart form, you should replace the full names with short names in the Description of Persons, Description of Organizations, Description of Event columns in form tables before the import process. Otherwise, you will want to find/replace full names with short names in Role in Case fields in both the Persons and Organizations spreadsheets, and the Fact Text field of the Facts spreadsheet after the import.

We strongly recommend that you review and edit names in the template before you import the information since it is faster to search/replace content there than searching individual fields in each CaseMap spreadsheet.

> Do not search/replace full names with short names in the Name of Persons or Name of Organization columns in the Intake Interview Jumpstart form. CaseMap automatically creates short names from these template entries.

### ⊟ Review the ReportBook after the import

When you import the Intake Interview Jumpstart form, CaseMap automatically creates a ReportBook of the imported information for you. When you complete the import wizard, a message box indicates that the ReportBook is created and available for to preview. The ReportBook also contains additional fields, like Key and Potential Source(s) so clients can provide more information or check the report for errors. You can save the ReportBook to a Reports folder on your network for reference purposes.

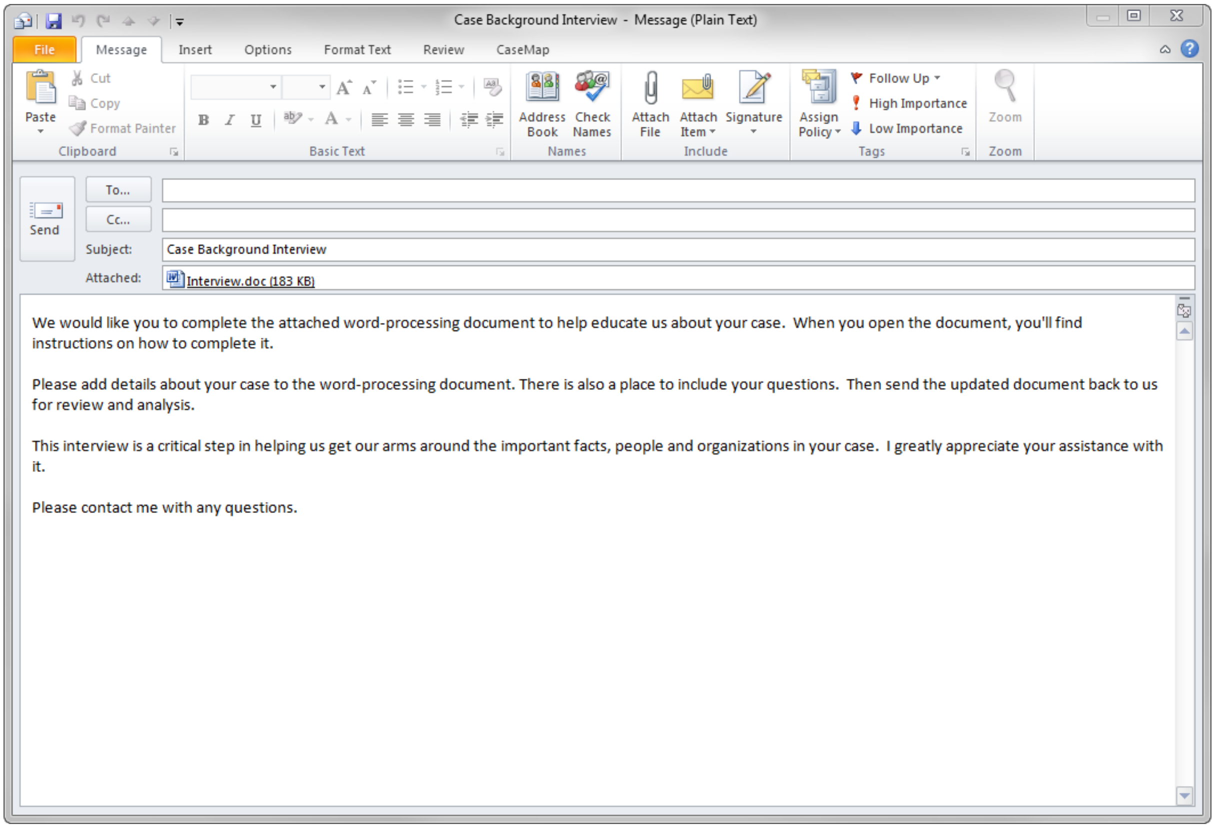
For more information, see About creating ReportBooks, Printing pre-built ReportBooks.

Related Topics

Importing the Intake Interview Form
Emailing the Intake Interview Form

### *Emailing the Intake Interview form*

After you've customized the Intake Interview form, you can simply email it to clients to complete and then email it back to you. A CaseMap wizard is used to insert the template into a Microsoft® Outlook email, which includes that attachment with default email content that you can use or customize.


Case Background Interview - Message (Plain Text)
File
Message
Insert
Options
Format Text
Review
CaseMap
Paste
Cut
Copy
Format Painter
Clipboard
Basic Text
Address Book
Check Names
Names
Attach File
Attach Item
Signature
Include
Assign Policy
Follow Up
High Importance
Low Importance
Tags
Zoom
Zoom
Send
To...
Cc...

Subject: Case Background Interview

Attached: Interview.doc (183 KB)

We would like you to complete the attached word-processing document to help educate us about your case. When you open the document, you'll find instructions on how to complete it.

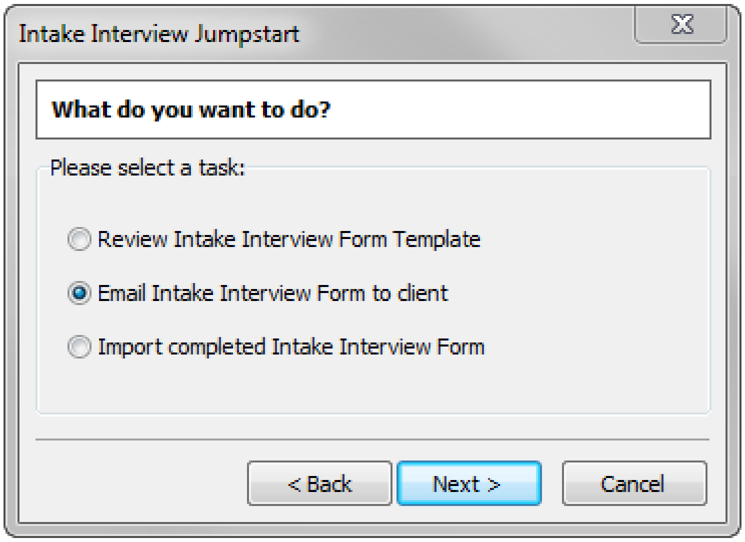
Please add details about your case to the word-processing document. There is also a place to include your questions. Then send the updated document back to us for review and analysis.

This interview is a critical step in helping us get our arms around the important facts, people and organizations in your case. I greatly appreciate your assistance with it.

Please contact me with any questions.

### To email the Intake Interview form to clients

1. Click the **File** tab, and then click **Getting Started**.
2. Under the **Jumpstart Guide** section, click **Intake Interview Wizard**.
3. When the wizard launches, click **Next**.
4. In the **What do you want to do?** box, select **Email Intake Interview Form to client**, then click **Next**.


Intake Interview Jumpstart
What do you want to do?
Please select a task:
○ Review Intake Interview Form Template
● Email Intake Interview Form to client
○ Import completed Intake Interview Form
< Back
Next >
Cancel

5. In the **Email Document Attachment Name** field, type in the name you want for the form.

6. Click **Finish** to generate the email.

7. Review the content in the email.

   You can modify the default content in the Subject line and body of the email as needed for your organization.

8. In the **To** field, type in the client's email address, then click **Send**.

Related Topics

About the Intake Interview Form
Importing the Intake Interview Form

### *Importing the Intake Interview Form*

Once the Intake Interview Form is completed by you or the client, importing the content back into the case is easily following the steps in the Intake Interview Jumpstart Wizard.

Remember to search/replace full names with short names in some of the templates table columns before you import it into the case. For more information, see To search/replace full names in the template before the import.

When you import the Intake Interview Jumpstart form, CaseMap automatically creates a ReportBook of the imported information for you. When you complete the import wizard, a message box indicates that the ReportBook is created and available for to preview. The ReportBook also contains additional fields, like Key and Potential Source(s) so clients can provide more information or check the report for errors. You can save the ReportBook to a Reports folder on your network for reference purposes.

⚠ Importing Intake Interview Forms that have the same objects identified may cause duplicate fact and object entries. Review intake forms before an import to isolate data that can be manually entered in the case. Or review the Facts and objects spreadsheets and delete or merge duplicate entries as needed. You will want to make note in the case where the source of the information came from.

### To search/replace full names in the template before the import

In order for linking to automatically generate for information imported from the Intake Interview Jumpstart form, you should replace the full names with short names in the Description of Persons, Description of Organizations, Description of Event columns in form tables before the import process. Otherwise, you will want to find/replace full names with short names in Role in Case fields in both the Persons and Organizations spreadsheets, and the Fact Text field of the Facts spreadsheet after the import.

We strongly recommend that you review and edit names in the template before you import the information since it is faster to search/replace content there than searching individual fields in each CaseMap spreadsheet.

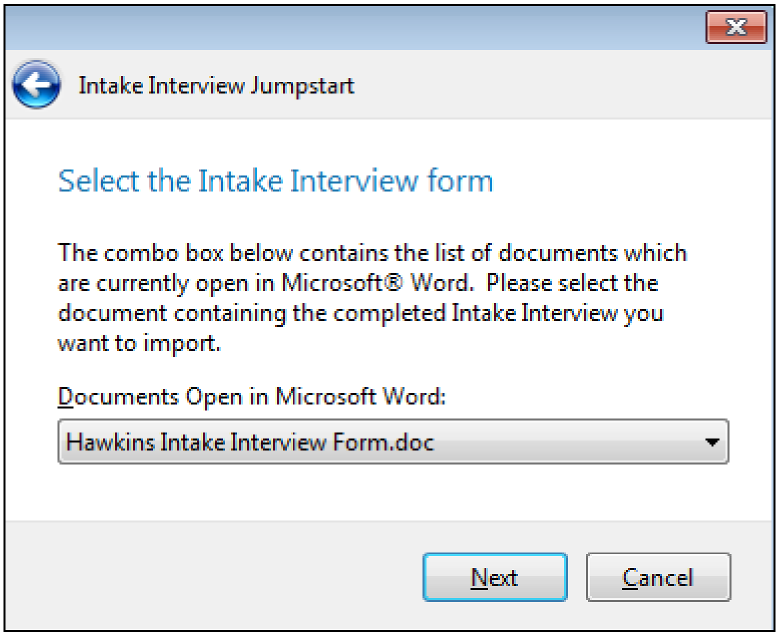
Do not search/replace full names with short names in the Name of Persons or Name of Organization columns in the Intake Interview Jumpstart form. CaseMap automatically creates short names from these template entries.

### To import the Intake Interview Form

1. In **Microsoft** Word, open the **Intake Interview Form**.

   The Intake Interview Form must be open in Word before the import can occur.

2. Minimize the **Word** window and return to the case in CaseMap.
3. On the **File** menu, click **Intake Interview Wizard**.
4. In the **Which task woul dyou like to accomplish?** box, select **Import completed Intake Interview Form**, then click **Next**.
5. In the **Prepare for Intake Interview import** box, click **Next**.
6. In the **Select the Intake Interview Form** box, select the form name you want to import in the **Documents Open in Microsoft Word** list, then click **Next**.



Select the Intake Interview form

The combo box below contains the list of documents which are currently open in Microsoft® Word. Please select the document containing the completed Intake Interview you want to import.

Documents Open in Microsoft Word: Hawkins Intake Interview Form.doc

7. 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.

   If dates are not entered in the template correctly, a message box displays asking you to fix them according to the format selected in the import wizard.

8. Click **Finish** to initiate the import process.

   When the import is complete, a message box displays stating that the import was successful and notes how many forms you can still import into the case.

9. Click **OK** to continue.

10. Another message box displays asking if you want to preview the ReportBook that CaseMap created for this intake form, click **Yes** or **No** to preview the report.

    The ReportBook is a copy of the intake form that you can print to a PDF file and save to the network folder where you store reports so it can be referenced later.

11. Return to the case to review the imported data by clicking on the **Facts**, **All Objects**, **Persons**, and **Documents** spreadsheets.

    As you click on each spreadsheet, notice how the number count updates next to the spreadsheet icon in the Case Shortcuts pane. The Source(s) field in the Facts spreadsheet notes the Intake Interview Form as the origin for imported fact records. Also notice that short names were automatically created in object spreadsheets and the Role in Case description fields are populated with data that the client entered.

Verify that all data imported correctly into each spreadsheet in the case. A case user may need to be assigned to this task and search/replace spreadsheet field data that may not have imported correctly.

Related Topics

About the Intake Interview Form
Importing the Intake Interview Form

# Importing Data

## About importing data

CaseMap provides you with the tools you need to import various data into your case. Each import method is designed to accommodate the import process needed for the type of work you want to accomplish. Most of your import needs are accommodated using the Import Linked Files Wizard, which allows you to bulk import documents and files into a case spreadsheet at one time.

Most import options in CaseMap automatically create a new spreadsheet record for you and link to the source file in a network folder or third-party product.

***Importing data options include the following:***

### Import Linked Files Wizard

The Import Linked Files Wizard allows you to import individual files or bulk import multiple files into a case spreadsheet, like the Documents spreadsheet or any other. The list of supported file types you can import is long and includes Microsoft® Office files, Adobe® .PDF files, and standard image files. You can choose to import a folder of files and files saved in sub-folders.

The Import Linked Files Wizard also has an option to capture document metadata.  This simplifies and automates the process to import and map document information into a CaseMap object spreadsheet.

The Import Documents Wizard is the quickest and easiest method of populating a case with multiple documents at one time. CaseMap automatically creates new records for each file while linking to the source file saved in a network folder. Additionally, CaseMap allows you to specify the source of the files that are imported. For more information, see Importing linked files.

### Records from a Text File

Any Word, WordPerfect, Excel, or other similar file type can be converted to a comma or (recommended) tab delimited text file before you import it into a spreadsheet. We recommend you use the Import Linked Files Wizard to import most data into a case. Fore more information, see Importing text files.

### Emails from Outlook

Launches the Email to PDF Wizard, which allows you to import emails from Microsoft Outlook or saved .pst files file stored in a computer/network folder or from a CD/DVD. The Email to PDF Wizard is part of DocPreviewer. For more information, see Converting emails to PDFs.

Importing emails involves some prior planning based on how you want to link to your emails and access saved files. For more information, see About importing emails.

⊟ **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 or Reader, LexisNexis Concordance®, TextMap®, and www.lexis Advance.com. CaseMap automatically links the spreadsheet record to the source file.

For more information, see About the Send to CaseMap tool and About PDFs and DocPreviewer.

CaseMap builds the case index and performs OCR processing in the background after files are imported into the case. For more information about these processes, see About the case index and About OCR processing.

Related Topics

About PDFs and DocPreviewer
Sending facts from PDFs
About importing emails
Importing linked files
Importing text files
About the Send to CaseMap tool

## Importing PDFs and using DocPreviewer

### *About PDFs and DocPreviewer*

CaseMap's integration with Adobe® Acrobat and Adobe® Reader provides you with additional tools and features that make the case analysis process easier.

Integration with CaseMap and Adobe PDF files is also part of the DocPreviewer feature. CaseMap's DocPreviewer add-in program easily handles basic PDF tasks like importing PDFs (requires Adobe Acrobat®). DocPreviewer also includes the Send to CaseMap tool, which allows you to create new fact records from PDF content and perform premium tasks like Bates Stamping and converting emails to PDF. Premium tasks require an additional subscription for DocPreviewer.

When you purchase a DocPreviewer subscription, you can use all the DocPreviewer tools accessible from CaseMap menus or from the DocPreviewer menus and toolbar that display in Adobe Acrobat or Reader. The CaseMap DocPreviewer toolbar and drop-down menu are automatically installed in Acrobat and Reader when you install CaseMap. If you have a DocPreviewer subscription and are also interested in using CaseMap's DocManager near native file viewer, please contact your CaseMap Sales Representative for upgrade pricing. For more information, see DocManager.

We recommend you use the Import Linked Files Wizard to bulk import PDF files into your case. Additionally, you can use DocManager to Bates stamp files and send emails to your case without having to convert them to PDFs. To learn more about these features and more, see Importing linked files and About DocManager.

You need CaseMap v8.0+ to use DocPreviewer, which can activate the add-in program for use. Contact your CaseMap Sales Representative at 866-316-8525 if you would like to add this feature.

If you are using CaseMap Server and have a SQL case open, you may not have permissions granted for using all DocPreviewer features. If so, these features will be disabled or grayed out in the DocPreviewer pane.

## ⊟ Reasons to convert case records to PDF

When you convert your case documents to PDF files, you have the advantage of using CaseMap tools and features that are exclusively integrated with Adobe Acrobat and Reader.

***Converting case documents to PDFs allows you to:***

- Send individual facts or text excerpts linked to documents to create/update case records in spreadsheets.
- Update individual fact records if you find additional text you want to include in the case record.
- Bulk import multiple PDF files to populate the case's Documents (or other) spreadsheets.
- Bulk update multiple PDF files to populate case records (useful when dealing with multiple Bates stamps).
- Convert emails to PDFs so you can store them on the network in files accessible by other users. Link to the email PDF files instead of Microsoft Outlook emails so hyperlinks are not broken.
- Review multiple documents in Acrobat without having to flip back and forth between Acrobat and CaseMap, or use DocPreviewer's PDF Review feature to scan through linked PDFs without having multiple document windows open in Acrobat or Reader.
- Edit case document data directly from the open PDF file in Acrobat.
- Locate the case document in CaseMap while working in the PDF document.
- Use Acrobat's tools to mark document content.
- Batch print PDF files linked to spreadsheet records.

We recommend you use the Import linked Files Wizard to bulk import files into your case. Additionally, you can use DocManager to view files without having to convert them to PDF. To learn more about these features and more, see Importing linked files and About DocManager.

### Review complete DocPreviewer descriptions

The following table provides descriptions of DocPreviewer features and where to access them.

Adobe® Acrobat v6.0+ (Standard or Professional) is required unless Adobe® Reader is also specified.

**DocPreviewer Overview**

| Feature | Description | Adobe Acrobat or Reader Required | DocPreviewer Subscription Required | CaseMap Version Required |
|---|---|---|---|---|
| Bates Stamp PDFs | Bates stamp a PDF file or a folder of PDFs using Acrobat. CaseMap recognizes PDF files previously Bates stamped with Acrobat v8.0+. CaseMap imports the PDFs files and fills in the Bates Begin, Bates End, and Pages fields on the Documents object spreadsheet. CaseMap's default behavior is to use the beginning Bates number as the full name and to create the short name. The Send to CaseMap wizard does offer you the option of retaining the document name of imported PDFs. See Bates stamping PDFs.<br>* Acrobat v8.0+ can apply more than one Bates stamp number to a PDF file. If your document collection has multiple Bates stamps applied in Acrobat v8.0+, the Send to CaseMap wizard is unable to import them into a case.<br>** You can also use the Batch Print Wizard to apply Bates stamps. See Batch printing linked documents. | Acrobat ONLY | Yes | CaseMap v6.0+ |
| Email to PDF Wizard | Convert emails in selected Microsoft Outlook folders to PDF documents (any email attachments are embedded in the PDF file) using a step-by-step wizard. DocPreviewer offers an option to populate the Persons | Acrobat ONLY | Yes | CaseMap v8.0+ |

| DocPreviewer Overview | | | | |
|---|---|---|---|---|
| **Feature** | **Description** | **Adobe Acrobat or Reader Required** | **DocPreviewer Subscription Required** | **CaseMap Version Required** |
| | spreadsheet with senders and recipients of the converted email. CaseMap automatically links the emails to senders and recipients. See Converting emails to PDFs.<br>* We recommend that you use DocManager to Send Email to CaseMap. See Send email to CaseMap. | | | |
| Import PDFs | Use to import one or multiple PDF documents into a case. This feature already exists in CaseMap as part of the Send to CaseMap tool. See Importing PDFs.<br>* You can also bulk import PDF files into a case using the Import Linked Files Wizard. See Importing linked files. | Acrobat ONLY | No | CaseMap v6.0+ |
| Review PDFs | Use the review mode to review a set of linked PDFs in Adobe Acrobat or Reader without opening multiple documents and switching back and forth from CaseMap. The DocPreviewer toolbar buttons in Acrobat and Reader allow you to navigate the linked documents. See Reviewing PDFs.<br>* You can also use DocManager to review linked files, including PDFs. See About DocManager. | Acrobat or Reader | No | CaseMap v8.0+ |
| Batch Prints PDFs | The batch print option allows you to print a set of PDFs linked to a spreadsheet. See Batch printing linked PDFs.<br>* You can also use the Batch Print Wizard, which also offers Bates stamping options. See Batch printing linked documents. | Acrobat ONLY | No | CaseMap v6.0+ |

| DocPreviewer Overview | | | | |
|---|---|---|---|---|
| **Feature** | **Description** | **Adobe Acrobat or Reader Required** | **DocPreviewer Subscription Required** | **CaseMap Version Required** |
| Send PDF document to CaseMap | Link a PDF document to an object spreadsheet (like the Documents spreadsheet). You can select the type of object and change the Full Name and Short Name entries.<br>The import process automatically links the case record to the PDF source file for you. See Importing PDFs.<br>* Accessible on the CaseMap DocPreviewer menu and toolbar in Acrobat or Reader. | Acrobat or Reader | No | CaseMap v6.0+ |
| Send Fact to CaseMap | Send selected text from a PDF file to the Facts spreadsheet to create a new fact record. The Send To CaseMap tool allows you to enter additional field information for the fact record before sending the fact.<br>If CaseMap does not recognize the document as an object, a Link this PDF to CaseMap dialog box opens for you to add the documents to an object spreadsheet. Once you complete this step, the Send to CaseMap - New Fact dialog box displays on-screen. See Sending facts from PDFs.<br>* Accessible on the CaseMap DocPreviewer menu and toolbar in Acrobat or Reader. | Acrobat or Reader | No | CaseMap v6.0+ |
| Edit CaseMap Document | Allows you to edit case document field data or link the document to issues in the associated spreadsheet, while still working in Acrobat or Reader. See Importing PDFs.<br>* Accessible on the CaseMap DocPreviewer menu and toolbar in Acrobat or Reader. | Acrobat or Reader | No | CaseMap v6.0+ |

**DocPreviewer Overview**

| Feature | Description | Adobe Acrobat or Reader Required | DocPreviewer Subscription Required | CaseMap Version Required |
|---|---|---|---|---|
| Send Multiple PDFs to CaseMap | Allows you to bulk import multiple PDF files or individual PDFs into a case using the Send PDFs to CaseMap utility. Uses the same import utility as Importing PDFs. You can select an individual file or group of files from a folder for import.<br>* Accessible on the CaseMap DocPreviewer menu and toolbar in Acrobat. | Acrobat ONLY | No | CaseMap v6.0+ |
| Send PDF to CaseMap - Update | Send updated data from a linked PDF file to the case record in CaseMap. Overwrites previous field values in the spreadsheet record. See Importing PDFs.<br>* Accessible on the CaseMap DocPreviewer menu and toolbar in Acrobat or Reader. | Acrobat or Reader | No | CaseMap v6.0+ |
| Send Fact to CaseMap - Update | Send selected text and linked file data from a PDF file to update the case record in the spreadsheet. The Facts spreadsheet must be open in the case with the record selected before you can import the updated content. The Send to CaseMap - Edit dialog box opens with the updated text displaying for that record, as well as allowing you to enter additional field information. See Importing PDFs.<br>* Accessible on the CaseMap DocPreviewer menu and toolbar in Acrobat or Reader. | Acrobat or Reader | No | CaseMap v6.0+ |
| Go to Linked CaseMap Document | Opens the CaseMap spreadsheet and highlights the case record to which this PDF file is linked as an attachment.<br>* Accessible on the CaseMap DocPreviewer menu and toolbar | Acrobat or Reader | No | CaseMap v6.0+ |

| DocPreviewer Overview | | | | |
|---|---|---|---|---|
| **Feature** | **Description** | **Adobe Acrobat or Reader Required** | **DocPreviewer Subscription Required** | **CaseMap Version Required** |
| | in Acrobat or Reader. | | | |

## ⊟ Try DocPreviewer features for free

DocPreviewer's premium features of Bates stamping and converting Outlook emails are available for a free 30-day trial period, the first time you click on a link in the pane. After the trial period, the Bates stamping and email conversion features are no longer accessible until you purchase a subscription to DocPreviewer. Each time you use the trial version, the utility displays number of days left in your grace period and gives you an option to activate it. To access DocPreviewer, click on the DocPreviewer bar in the Navigation pane.

To purchase a DocPreviewer subscription, contact your LexisNexis CaseMap account representative at 866-316-8525 or email LitigationSalesGroup@ReedElsevier.com.

## ⊟ Read more about DocPreviewer activation/installation

Most DocPreviewer features are built into CaseMap and are automatically installed in Adobe Acrobat or Reader when CaseMap is installed. The DocPreviewer add-in that enables Bates stamping and email conversion to PDF is a companion product sold separately as a subscription in addition to CaseMap licenses. If you've purchased a DocPreviewer subscription, the add-in is installed in Acrobat during the installation of CaseMap and is activated at the same time you activate your CaseMap license.

If you install and activate CaseMap and DocPreviewer, then purchase a full Acrobat license (Standard or Professional), upgrade to a later version of Acrobat or Reader, or download 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 CaseMap is not available on your computer, the Detect and Repair option may not work. You can install DocPreviewer by reinstalling CaseMap at 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 Acrobat and Adobe Reader, as needed.

Related Topics

About importing data

About Bates stamping

Bates stamping PDFs

Batch printing PDFs

Reviewing PDFs

Converting emails to PDFs

About DocManager

### *About Bates stamping*

Bates stamping is the process of applying a set of identifying numbers to a document collection of PDFs to label and identify them.

You can use DocPreviewer to apply a Bates stamp to documents — even if you don't import them into a case spreadsheet. DocPreviewer's CaseMap Bates Stamp Utility opens each PDF file and then stamps each page of the document. You can apply Bates stamps to individual PDF files or a set of PDF files. You can define Bates number sequences. DocPreviewer automatically saves the sequences for future use.

***The Bates stamp utility is accessible from the following locations:***

- Acrobat > CaseMap DocPreviewer menu > Bates Stamping > Bates Stamp PDFs
- Case Tools ribbon > File Tasks > Bates Stamp Linked PDFs

CaseMap's DocManager add-in program allows you to Bates stamp files using the Batch Print Wizard. See About DocManager and Batch printing linked documents.

⚠ We recommend that you create and store a backup copy of all your original PDF files 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

The following table provides descriptions of Bates stamping capabilities in CaseMap.

| Bates Stamping Overview |
|---|
| There is no limit to the number of PDF files that can be Bates stamped using DocPreviewer. |
| The maximum Bates label length is 34 characters, including the prefix. |
| Bates labels can be placed anywhere on a document page. |

### Bates Stamping Overview

Bates stamp label sizes cannot be minimized. Experimenting with this image may damage it.

You can create your own prefix style in the CaseMap Bates Stamp wizard when you select the Create new case numbering format option. Prefixes are counted in the maximum character length of 34.

You can choose the following options: font style and size, and the location of the Bates label on the PDF file. You can also choose whether a white background (default) is used behind the stamp. These options are available in the CaseMap Bates Stamp wizard in the CaseMap Bates Stamp wizard when you select the Create new case numbering format option.

* By default a white background in placed behind a Bates number so that it can be easily seen in a PDF file. You can turn this option off by clicking the Edit button on the Review Case Bates Numbering Format page of the wizard. Under Miscellaneous at the bottom of the box, clear the Fill Bates Number background solid white selection or check box.

Manage Bates numbering formats in Acrobat by clicking CaseMap DocPreviewer button > Bates Stamping > Manage Bates Numbering Formats. You must close all PDF files before you can access this tool.

Additionally, you can edit Bates numbering formats in the CaseMap Bates Stamp wizard on the Review case Bates Numbering format page and then click the Edit button.

During a bulk import of PDFs using the Import PDFs utility, DocPreviewer automatically loads the Bates begin and end numbers, as well as the page count for each document into the case record in the Documents spreadsheet.

* CaseMap can only identify Bates stamps created by DocPreviewer or Adobe® Acrobat, not those created by other Bates stamp tools.

The Bates Stamps PDFs utility can only recognize CaseMap and Acrobat Bates stamps. And it can only replace CaseMap Bates stamps.

- The Bates Stamp PDFs utility recognizes PDFs already containing a CaseMap or Acrobat Bates stamp and ignores these documents during Bates stamping by default. If you choose to re-stamp PDFs containing CaseMap Bates stamps, the original stamps will be deleted and replaced with the new stamps. To re-stamp PDFs, clear the Ignore PDFs that are already Bates Stamped check box on the bottom of the Select the PDF file you want to Bates stamp dialog box in the CaseMap Bates Stamp utility.
- The Bates Stamps PDFs utility recognizes Acrobat Bates stamps but cannot remove or replace them. If you choose to stamp PDFs containing Acrobat Bates stamps, the original stamps will remain, resulting in multiple Bates stamps on the PDFs.

If a value is changed in either the Bates - End or Pages fields in the Documents spreadsheet, the other field is then synchronized and adjusts its values accordingly.

### ⊟ Learn how to Bates stamp PDFs after they are linked into CaseMap

Bates stamping in CaseMap and DocPreviewer are slightly different processes although they are part of the same add-in tool.

***Please review the following before Bates stamping PDFs:***

- You can use the Send PDFs to CaseMap wizard to imports PDFs into a case to create records in the case that are linked to the PDF source files — without Bates stamping the files.
- If you have already applied a Bates stamp to PDFs using DocPreviewer, you will have the option to import the Bates numbers into CaseMap.
- If you import PDFs into a case before applying a Bates stamp, then subsequently use DocPreviewer to Bates stamp them, you can run the Send PDFs to CaseMap utility again to update the existing document records with the Bates begin and end numbers.

The CaseMap Bates Stamp utility only modifies PDF files, it does not create a backup copy of the files. If you want a backup copy, you must do this before Bates stamping.

## Perform OCR processing for PDF files prior to Bates stamping

We recommend that you perform any Optical Character Recognition (OCR) processing prior to Bates stamping PDF files.

Current versions of Adobe Acrobat misinterpret the Bates numbers applied by DocPreviewer, as well as those applied by different products. Acrobat identifies the Bates stamp by all these tools as added text and so assumes the PDF file has been OCR processed and will not allow it to be OCR processed again. Because of this, we recommend that you always OCR process PDF files before applying a Bates stamp in Acrobat or in CaseMap or DocPreviewer. If a PDF file only contains images (no text), you will not be able to OCR process the files in Acrobat once they have a CaseMap Bates stamp.

If you Bates stamp PDF files that you originally decided not to OCR process, and later change your mind, you will need to remove and then re-apply the Bates stamps. This process can be done, but it requires some time and effort. If you need to remove and replace Bates stamps, contact CaseMap Support for assistance.

## Address multiple Bates numbering issues before importing documents

If you have a set of documents that already have Bates numbers applied to them, you want to follow certain steps so that you can track the original Bates numbers while applying your own Bates stamp to the documents when the are imported into the case.

For example, when opposing counsel sends you its documents, the documents may already have Bates stamp and production numbers applied to them. You will want to track the original Bates numbers as well as stamp the documents with your own Bates numbering format. And you will probably not know what tool was used to Bates stamp the produced documents.

***Bates stamping scenarios:***

- If the documents are Bates stamped using a tool other than CaseMap, then CaseMap cannot read the numbers and they will not be imported into the case. You may need to manually enter the original Bates number for each document into each document record in the case in order to track it. We recommend that you create two new fields to store the documents' original Bates numbers.
- If the documents are Bates stamped using CaseMap's Bates stamping tool in DocPreviewer, then CaseMap will read the Bates stamp and import the numbers directly into the Bates - Begin and Bates - End fields for these document records. However, this numbering format will not match your organization's Bates numbering scheme and so you will need to apply your own Bates stamp to this set of documents.

We recommend that you follow the steps outlined here to import a set of documents in manner that retains the original Bates numbers and also lets you apply Bates stamp of your own.

### ⊟ To track and import documents with multiple Bates numbers

1. First create two new spreadsheet fields to store the original Bates numbers of these document records.

   For example, you may want to add a prefix like "Opp" or "Org" to identify these Bates numbers as being the originals applied by opposing counsel (Org Bates - Begin or Opp Bates - Begin). See Creating custom fields.

2. Using the **Import PDFs** tool in **DocPreviewer**, bulk import the documents (PDF files) into the case spreadsheet where you want to store them. See Importing PDFs.

   Notice that by default the original Bates numbers automatically populate the Bates - Begin and Bates - End fields after the bulk import.

3. Next use the **Bulk Field Copy** tool to copy the original Bates numbers from the **Bates - Begin** and **Bates - End** fields to the new custom fields you created, like **Opp Bates - Begin** and **Opp Bates - End**. See Making global replacements.

4. Now use the **Bates Stamp PDFs** tool in **DocPreviewer** to apply your Bates numbering format to the same set of documents. See Bates stamping PDFs.

   Clear the Ignore PDFs that are already Bates Stamped check box in the wizard to ensure that you are not skipping any documents.

   You will want to place your Bates stamp in a different location than the original to reduce confusion between them.

5. Next bulk import the same set of documents into the case again, and be certain to select the **Overwrite existing destination CaseMap field values with PDF values** check box in the import wizard so the new Bates number metadata will overwrite the original values. See Importing PDFs.

   The document records are now updated with your organization's Bates numbering scheme, which automatically populates the Bates - Begin and Bates - End fields for those same document records.

   The Import PDFs utility recognizes PDF files that are already imported into the case and will not create duplicate record entries, but will update document record fields with new metadata (like Bates numbers).

6. Return to the spreadsheet that contains these records to verify that both sets of Bates numbers are populated in the appropriate fields.

Related Topics

About PDFs and DocPreviewer

Bates stamping PDFs

### *Bates stamping PDFs*

When running the CaseMap Bates Stamp utility, you will be asked to make a backup copy of all original PDF files that do not have any highlighting or Bates stamping applied to them. If you have not made a backup, please do so at this time.

The Case Map Bates Stamp utility will recognize PDF files that already have a CaseMap Bates stamp applied. By default, CaseMap ignores these files. If you choose to re-stamp PDF files that already have a CaseMap Bates stamp, the original stamps will be deleted and replaced with new stamps. This utility only recognizes Bates stamps created that it has created. If you have documents that are Bates stamped by another program, CaseMap will not recognize them. To track the original Bates numbers and then apply CaseMap Bates stamps, see Address multiple Bates numbering issues before importing documents.

The CaseMap Bates Stamp Utility requires Adobe® Acrobat® v6.0+ (Professional or Standard). It does not work with Adobe Reader®.

CaseMap's DocManager add-in program allows you to Bates stamp files using the Batch Print Wizard. See About DocManager and Batch printing linked documents.

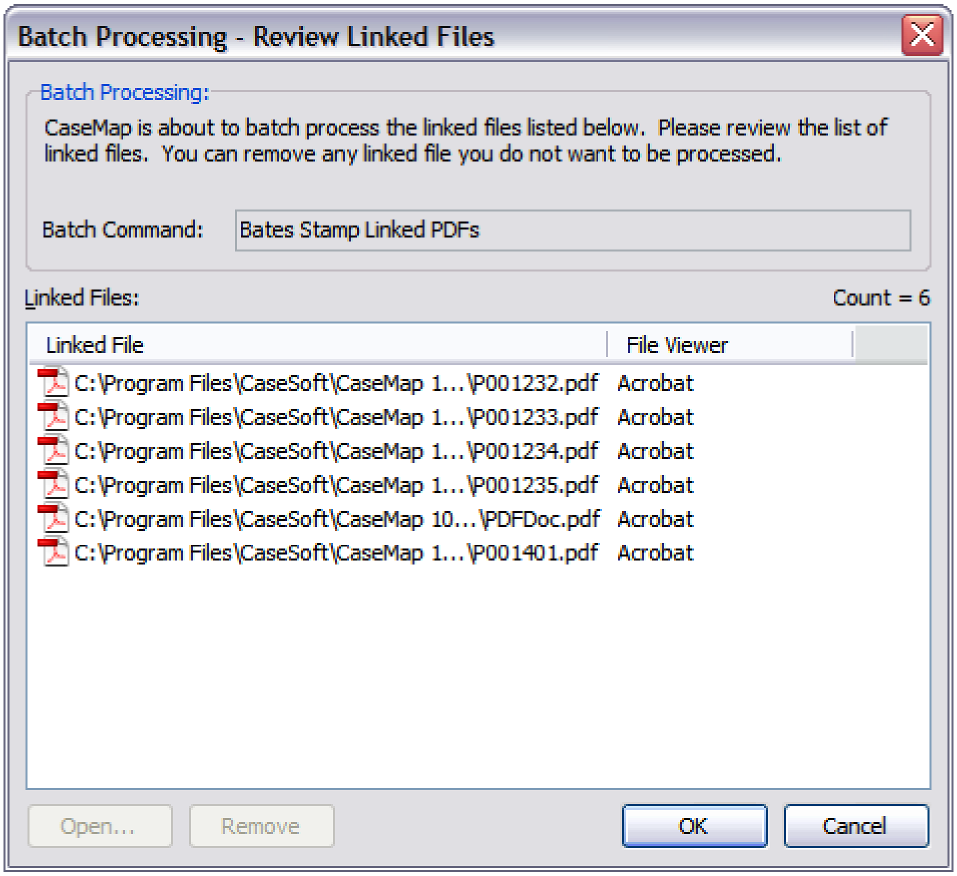
#### ⊟ To apply a Bates stamp to PDFs

1. On the **Case Tools** ribbon, click **File Tasks**, and then click **Bates Stamp Linked PDFs**.

   You can also open the CaseMap Bates Stamp utility in Adobe Acrobat by clicking on the CaseMap DocPreviewer button and then clicking Bates Stamping. On the submenu, click Bates Stamp PDFs and then click OK in the message box. If doing so, you can now skip to Step 8.

2. In the message box, click **OK** to send all linked PDFs in the current spreadsheet to the CaseMap Bates Stamp utility.

3. In the **Batch Processing - Review Linked Files** dialog box, review linked files and remove any you do not want to Bates stamp.



CaseMap is about to batch process the linked files listed below. Please review the list of linked files. You can remove any linked file you do not want to be processed.

Batch Command: Bates Stamp Linked PDFs

Linked Files: Count = 6

| Linked File | File Viewer |
|---|---|
| C:\Program Files\CaseSoft\CaseMap 1...\P001232.pdf | Acrobat |
| C:\Program Files\CaseSoft\CaseMap 1...\P001233.pdf | Acrobat |
| C:\Program Files\CaseSoft\CaseMap 1...\P001234.pdf | Acrobat |
| C:\Program Files\CaseSoft\CaseMap 1...\P001235.pdf | Acrobat |
| C:\Program Files\CaseSoft\CaseMap 10...\PDFDoc.pdf | Acrobat |
| C:\Program Files\CaseSoft\CaseMap 1...\P001401.pdf | Acrobat |

4. Click **OK** to continue.

   The CaseMap Bates Stamp Utility now launches.

5. On the submenu, click **Bates Stamp PDFs**.

6. In the message box, click **OK**.

   Notice that Acrobat automatically launches behind the CaseMap Bates Stamp Utility.

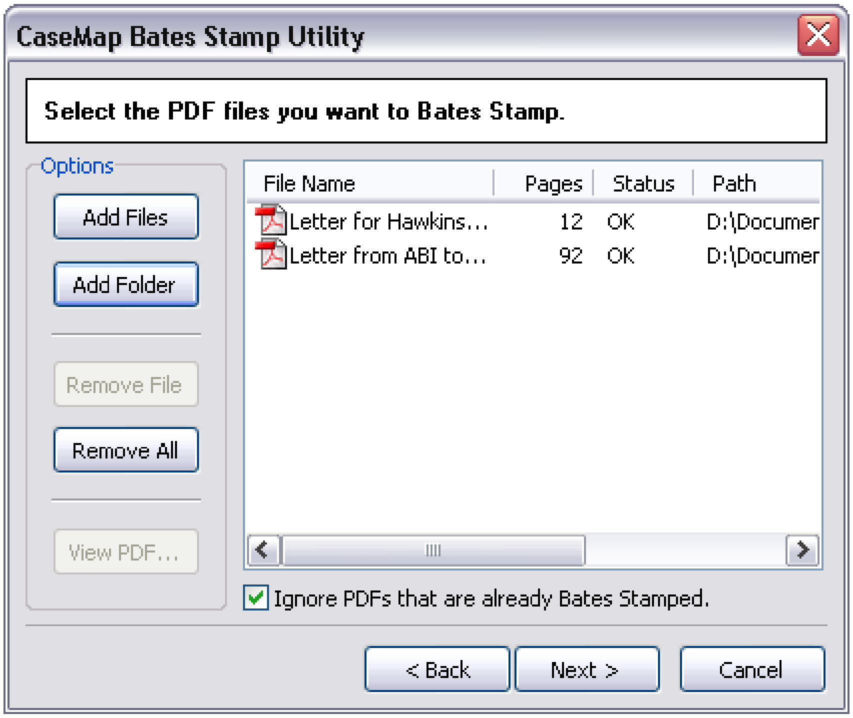
7. In the **CaseMap Bates Stamp Utility**, click **Next**.

8. 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.

   You can Bates stamp an individual PDF file by clicking the Add Files button.

9. Verify that the **Ignore PDFs that are already Bates Stamped** check box is selected.

10. In the **Browse for Folder** dialog box, select the folder where the PDF files are stored, then click **OK**.


CaseMap Bates Stamp Utility
Options
Add Files
Add Folder
Remove File
Remove All
View PDF...
< Back
Next >
Cancel

Select the PDF files you want to Bates Stamp.

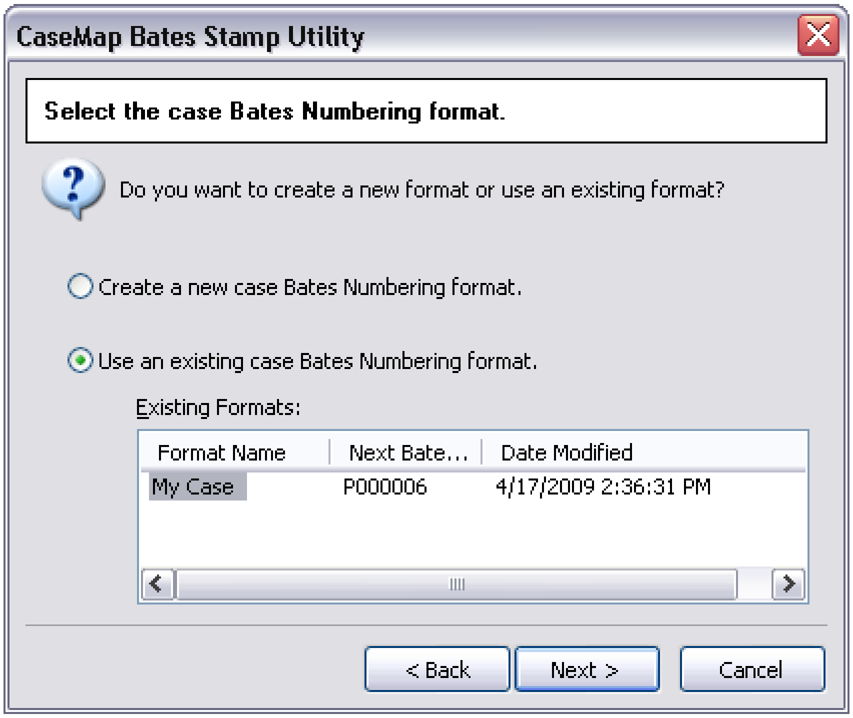
| File Name | Pages | Status | Path |
|---|---|---|---|
| Letter for Hawkins... | 12 | OK | D:\Documer |
| Letter from ABI to... | 92 | OK | D:\Documer |

☑ Ignore PDFs that are already Bates Stamped.

If you need to delete a file from the list, select it and click the Remove File or Remove All button.

11. Click **Next** to continue.

12. In the **Select the case Bates Numbering format** dialog box, select the **Create a new case Bates Numbering** option, then click **Next**.



CaseMap Bates Stamp Utility

Select the case Bates Numbering format.

Do you want to create a new format or use an existing format?

○ Create a new case Bates Numbering format.

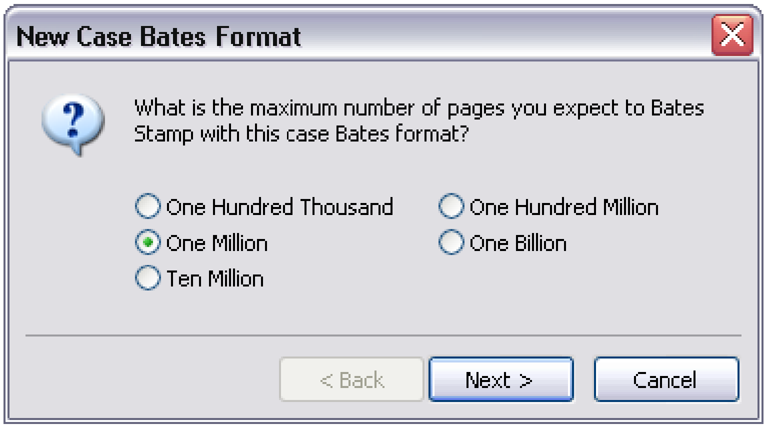
● Use an existing case Bates Numbering format.

Existing Formats:

| Format Name | Next Bate... | Date Modified |
|---|---|---|
| My Case | P000006 | 4/17/2009 2:36:31 PM |

If you select the Use an existing case Bates Numbering format option, CaseMap will continue using the format you have already been using.

13. In the **New Case Bates Format** box, select the page number option that is applicable to the document collection you are processing, then click **Next**.



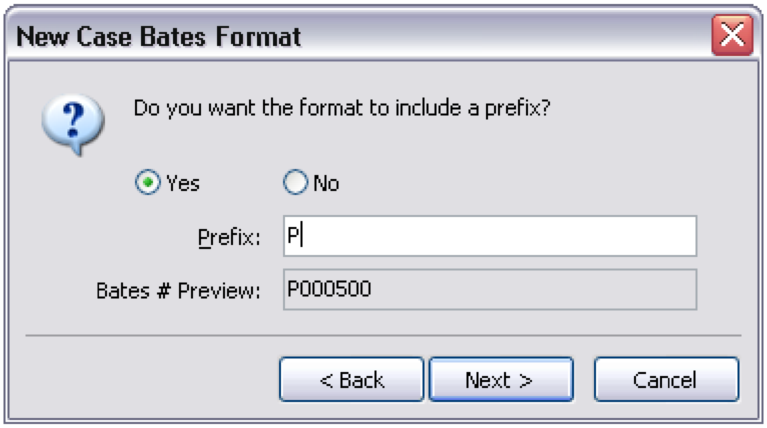
New Case Bates Format

What is the maximum number of pages you expect to Bates Stamp with this case Bates format?

○ One Hundred Thousand
● One Million
○ Ten Million
○ One Hundred Million
○ One Billion

14. In the **Start numbering at** field, type the number you want to use for this set of documents.

15. In the **Prefix** field, select **Yes** and type the prefix you want to use for the Bates stamp, then click **Next**.



New Case Bates Format

Do you want the format to include a prefix?

● Yes ○ No

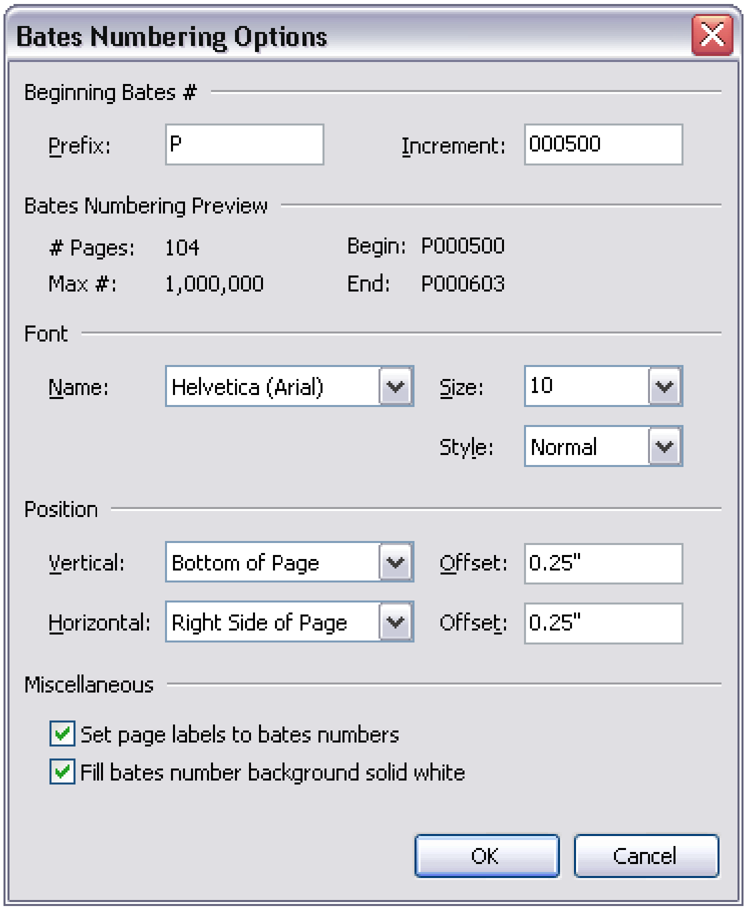
Prefix: P

Bates # Preview: P000500

16. In the **Case Name** field, type in the name for the Bates numbering format, then click **Finish**.

17. In the **Review case Bates Numbering format** box, verify the Bates numbering range and prefix, as well as format settings.

18. Click the **Edit** button to modify these settings, then click **OK**.



Bates Numbering Options

Beginning Bates #

Prefix: P

Increment: 000500

Bates Numbering Preview

# Pages: 104

Max #: 1,000,000

Begin: P000500

End: P000603

Font

Name: Helvetica (Arial)

Size: 10

Style: Normal

Position

Vertical: Bottom of Page

Offset: 0.25"

Horizontal: Right Side of Page

Offset: 0.25"

Miscellaneous

☑ Set page labels to bates numbers

☑ Fill bates number background solid white

19. Click **Next** to continue.

20. In the **Choose the order the PDFs will be stamped** dialog box, select a PDF file and click the **Move Up** or **Move Down** button to modify the stamp order.

    Click the Remove File button to delete a PDF file from the listing.

    Click the View PDF to review the PDF file before applying a Bates stamp to it.

21. Click **Next** to continue.

22. In the **Review and Begin Bates Stamping** dialog box, verify the summary and then select the **I have read the above summary and I am ready to proceed** check box.

23. Click **Finish** to initiate the process.

24. In the message box to confirm the number of PDF files successfully stamped with a Bates number, verify that the **Select the Send these PDFs to CaseMap after closing this message** check box is selected, then click **Close**.

    If you do not select the Send these PDFs to CaseMap after closing the message check box, the documents will be Bates stamp but will not be imported into the case until select the PDF files for import using the Send to CaseMap utility.

25. Complete the steps in the **Send PDFs to CaseMap** wizard to import PDFs into the case.

26. In the message box displays the number of records successfully imported into the case, click **OK**.

27. Return to the **Documents** spreadsheet in the case to verify the PDF file import.

    Notice that the Send to CaseMap wizard automatically linked the document record to the PDF source file stored in the network folder.

For more information on using the Send to CaseMap wizard, see Importing PDFs.

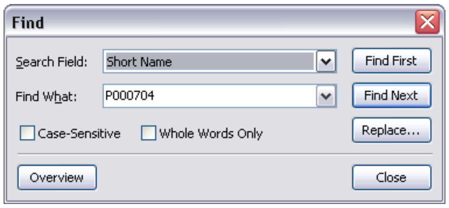
### To locate documents with a Bates numbers

You can locate a case record with a Bates number on the Documents spreadsheet by using the Find tool.

1. In the **All Shortcuts** pane, click on the **Documents** icon.

2. On the **Home** menu, click **Find**.

3. In the **Find** dialog box, click on the field you want to search in the **Search Field** listing.



Search Field: Short Name

Find What: P000704

☐ Case-Sensitive ☐ Whole Words Only

4. In the **Find What** field, type in the Bates number you want to locate.

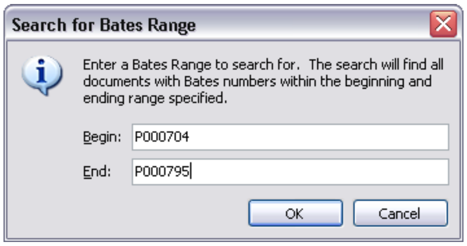
5. Click the **Find First** button.

   The document record is now highlighted in the Documents spreadsheet.

## To locate a range of Bates numbered documents

You can also locate a specified range of Bates numbered documents using the Filter feature.

1. In the **All Shortcuts** pane, click on the **Documents** icon.
2. Right-click in the **Bates - Begin** or **Bates - End** fields.
3. On the shortcut menu, click **Filter for Bates Range**.
4. In the **Search for Bates Range** dialog box, type in the Bates numbers in the **Begin** and **End** fields, then click **OK**.



Search for Bates Range

Enter a Bates Range to search for. The search will find all documents with Bates numbers within the beginning and ending range specified.

Begin: P000704

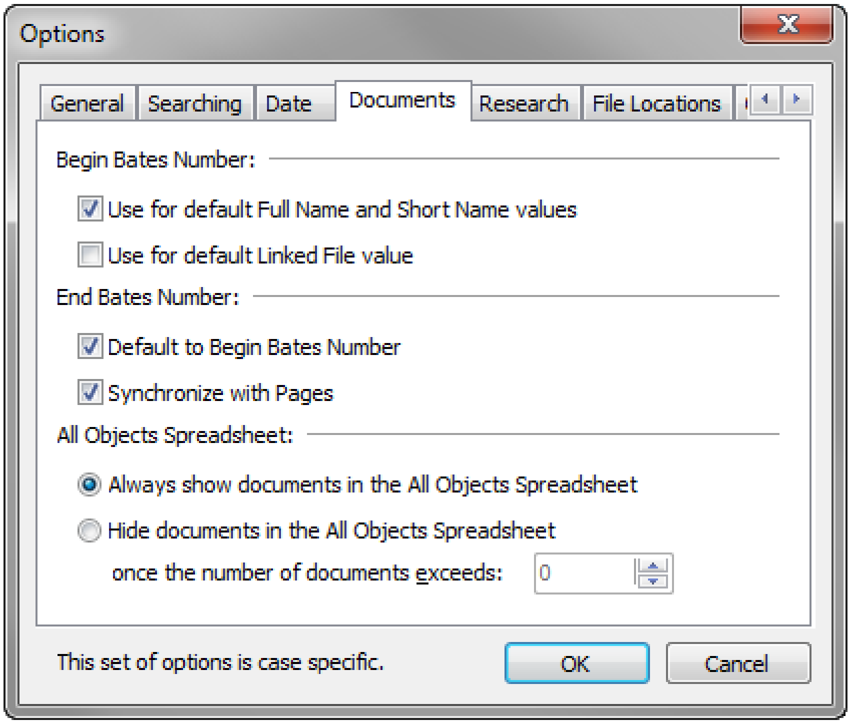
End: P000795

The documents within the Bates numbering range specified are now filtered and display in the spreadsheet.

You can save this search if you need it for future reference.

## To modify Bates numbering settings

1. On the **File** menu, click **Options**.
2. In the **Options** box, click the **Documents** tab.



Begin Bates Number:

☑ Use for default Full Name and Short Name values

☐ Use for default Linked File value

End Bates Number:

☑ Default to Begin Bates Number

☑ Synchronize with Pages

All Objects Spreadsheet:

● Always show documents in the All Objects Spreadsheet

○ Hide documents in the All Objects Spreadsheet

once the number of documents exceeds: 0

This set of options is case specific.

3. In the **Begin Bates Number** and **End Bates Number** areas, select or clear check box options.
4. Click **OK** to save your changes.

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 expect to Bates stamp with this case Bates format, then click **Next**.
5. In the **Start Numbering** field, type in the number you want to start with, then click **Next**.
6. Select whether to include a prefix in the numbering format, then click **Next**.

   If you select Yes, type in the prefix in the Prefix field.
7. In the **Case Name** field, type in a name for the new case Bates format.
8. Click **Finish**.

The new Bates numbering format now displays in the Manage Bates Numbering Formats dialog box.

You can modify, rename, and delete numbering formats as needed.

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

### To turn off Bates End/Pages Synchronization

CaseMap includes a feature to automatically synchronize Bates number pages for you. This feature is turned on by default.

For example, if you adjust a document record's Bates End entry or the Pages value, then the corresponding field automatically adjusts to remain in synch with this change.

As another example, if you have a document with a Bates - Begin value of P001232 and a Bates - End value of P001234, then the Pages field displays a "3" as its value. The information could have come in through bulk import or is the result of manual entry. When you review the document, you notice that it's actually a four-page document. Changing the value in the Pages field to "4" will automatically synch the Bates - End number to P001235. And vice versa.

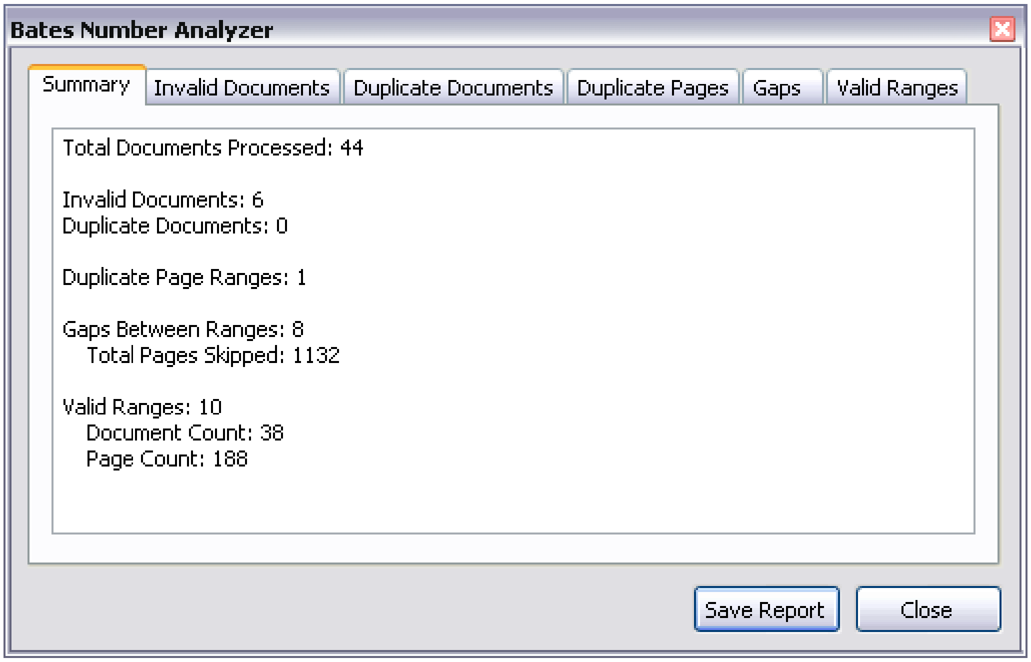
#### To turn off this feature

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click the **Documents** tab.
3. Clear the **Synchronize with Pages** check box.
4. Click **OK** to save the setting change.

### To run the Bates Analyzer

The Bates Analyzer tool allows you to review the Bates numbers in the Bates - Begin and Bates - End fields to locate any inconsistencies, duplications, and anomalies on the Documents spreadsheet.

1. On the **Standard** toolbar, click **Case Tools**, and then click **Analyze**.
2. On the sub-menu, click **Bates Analyzer**.
3. In the **Bates Number Analyzer** dialog box, click on the **Summary** tab to for a complete summary of document processed.


Bates Number Analyzer
Summary
Invalid Documents
Duplicate Documents
Duplicate Pages
Gaps
Valid Ranges
Save Report
Close

Total Documents Processed: 44

Invalid Documents: 6
Duplicate Documents: 0

Duplicate Page Ranges: 1

Gaps Between Ranges: 8
Total Pages Skipped: 1132

Valid Ranges: 10
Document Count: 38
Page Count: 188

4. Click on the **Invalid Documents** tab to review the error messages for documents that do not have a valid Bates number.

5. Click on the **Duplicate Documents** tab to review all duplicate documents.

6. Click on the **Duplicate Pages** tab to review any duplicate Bates numbers.

7. Click on the **Gaps** tab to review gaps in Bates numbering for documents, including the number of pages skipped.

8. Click on the **Valid Ranges** tab to review all valid documents with Bates numbers, including the document and page count.

9. Click on the **Save a Report** button to save any of the current data to a HTML file for reference purposes.

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

Related Topics

About PDFs and DocPreviewer
About Bates stamping
Importing PDFs

### *Importing PDFs*

Bulk importing PDF files into CaseMap is a process that automatically attaches multiple PDF files to case records in the Documents spreadsheet. During the import process, CaseMap also brings in record data, including Bates begin/end numbers, the page count of the file, the date, and document name. Body content from PDF files is not imported. Short names are automatically created off the Full Name field entry you choose, whether it is a document file name or Bates number.

With the bulk import utility, you do not have to import or link to individual files because the Send PDFs to CaseMap tool bulk imports a folder of documents and sets the attachment links to object records for you. Once you have run the utility and imported documents from a network folder, you can still re-run it on the same folder. The import utility identifies previously imported files within the selected folder and selects only new PDFs for processing. You can also import an individual PDF file, if needed. You can access the Send PDFs to CaseMap utility from the Tools menu, by clicking Linked Files and then clicking Bulk Import PDFs.

Bulk importing PDFs does not work with Adobe Reader. You must have Adobe Acrobat v6.0 + (Standard or Professional) installed on the same computer as CaseMap in order to use the Bulk Import PDFs utility.

We recommend you use the Import Linked Files Wizard to import PDF files into CaseMap. For more information, see Importing linked files.

When documents are converted to Adobe Acrobat files for inclusion in a case, it is best to convert individual documents to individual PDF files to ensure that Bates numbers can be applied for tracking and that individual files can be attached to the associated fact or issue. Smaller PDF files also import faster into a case.

In the event that you want to renumber documents, we recommend that you keep a backup copy of all original PDF files that do not have any highlighting or Bates stamping applied to them.

#### To bulk import PDFs into a case

1. Verify that you have the relevant case open in CaseMap.
2. On the **File** menu, click **Import**, and on the submenu, click **Import Linked Files from a Folder**.
3. When the **Import Linked Files Wizard** opens, click **Next**.
4. In the **Import Linked Files Wizard**, click **Add Files** to add files, or click **Add Folder** to add a folder.
5. In the **Select Files to Import** dialog box, select the files (PDFs) to import into the case.
6. In the **Import Linked Files Wizard** dialog box, review the files to be imported, and click **Next** to continue.
7. In the **Select Spreadsheet** dialog box, select the CaseMap spreadsheet (e.g., Documents) where the files are to be imported and then click **Next**.

8. In the **Ready to Import** dialog box, verify your selection and then click **Next** to start the import process.

9. In the **Completing the Import Linked Files Wizard** completion box, click **Finish**.

10. In CaseMap, go to the **Documents** spreadsheet and review the new records you just imported.

    Notice that the records you bulk imported now have a paperclip icon to the far left of the record, indicating that the attachment link to the source file is set.

11. Click on a **Paperclip** icon for one of the documents records to view the linked file from within CaseMap.

12. Scroll to the far right of the Documents spreadsheet and notice that the **Linked File** fields for these records include the folder path where the source files are located.

    You can now analyze the records and organize them by type and status.

Remember to run the Short Name Assistant utility after performing a bulk import to ensure that links were created for new objects in description fields for this import. For more information, see the Using the Short Name Assistant help topic.

### ⊟ To import an individual PDF file

You can import a singe PDF document into a case as opposed to bulk importing a set of files. Follow the steps above To bulk import PDFs into a case. When you reach Step 4, click the Add Files button to select the PDF document. Then complete the remaining steps in the procedure to import the file into the Documents spreadsheet. When you are finished the PDF source file will be added to the Documents spreadsheet as an object record. A link to the source file stored in a network directory is also automatically created so you can view the document within CaseMap.

### ⊟ To import an updated PDF file

If you need to update a PDF document in CaseMap with new version of the PDF file, simply open the updated source file and resend it to the case.

1. In the applicable spreadsheet, highlight and open the case record you want to update.

2. Optional: If the file opens in **CaseMap DocManager**, click the **Open Native** button to continue.

3. In the **Acrobat** source file, click the **CaseMap DocPreviewer** button, and then click **Advanced > Send PDF to CaseMap - Update**.

4. Optional: In the message box, click **Yes** to continue.

5. In the **Acrobat** source file, click **CaseMap DocPreviewer**, click the **Send PDF to CaseMap** button to continue.

6. In the **Send To CaseMap** message box, click **Yes** to keep existing links, otherwise, click **No**.

7. In CaseMap, view the applicable spreadsheet and verify that the information is now updated in the file for this record.

### To edit a linked PDF document

You can edit a linked PDF file from within Acrobat to set field status or link to case issues for the document record in CaseMap. You must have the relevant case open in CaseMap for this process to work.

1. In the **Acrobat** source file, click the **CaseMap DocPreviewer** button, and then click **Edit CaseMap Document**.
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.

The Review PDFs feature is available as part of CaseMap's DocPreviewer feature set. You must have Adobe® Acrobat v6.0+ (Standard or Professional) or Adobe® Reader v6.0+ installed on the same computer as CaseMap to use this tool.

If you are not using a document management system (like Concordance) or other image viewer application, use Adobe Acrobat's tools to mark text or insert comments in your document files that you need to reference later.

CaseMap's DocManager add-in program allows you to review and annotate PDF files. See About DocManager.

### To review PDF files

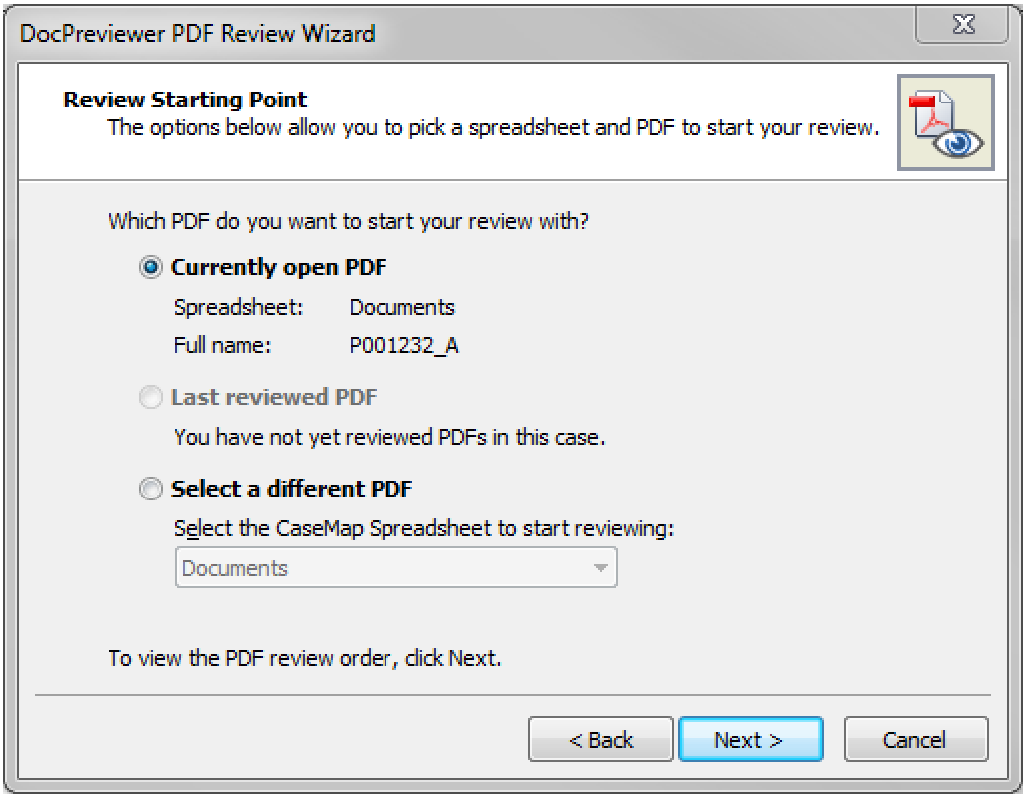
1. Launch **Adobe Acrobat**.
2. Click the **CaseMap DocPreviewer** button, click **Review PDFs**.

3. On the submenu, click **Start Reviewing PDFs**.

   If you already have a PDF document open for review, click the **Start Reviewing PDFs** button Start Reviewing PDFs... on the CaseMap DocPreviewer toolbar.

4. In the **DocPreviewer PDF Review Wizard**, click **Next**.

5. In the **Review Starting Point** dialog box, select which PDF file in which you want to start the review, then click **Next**.



**Review Starting Point**

The options below allow you to pick a spreadsheet and PDF to start your review.

Which PDF do you want to start your review with?

● **Currently open PDF**

Spreadsheet: Documents

Full name: P001232_A

○ **Last reviewed PDF**

You have not yet reviewed PDFs in this case.

○ **Select a different PDF**

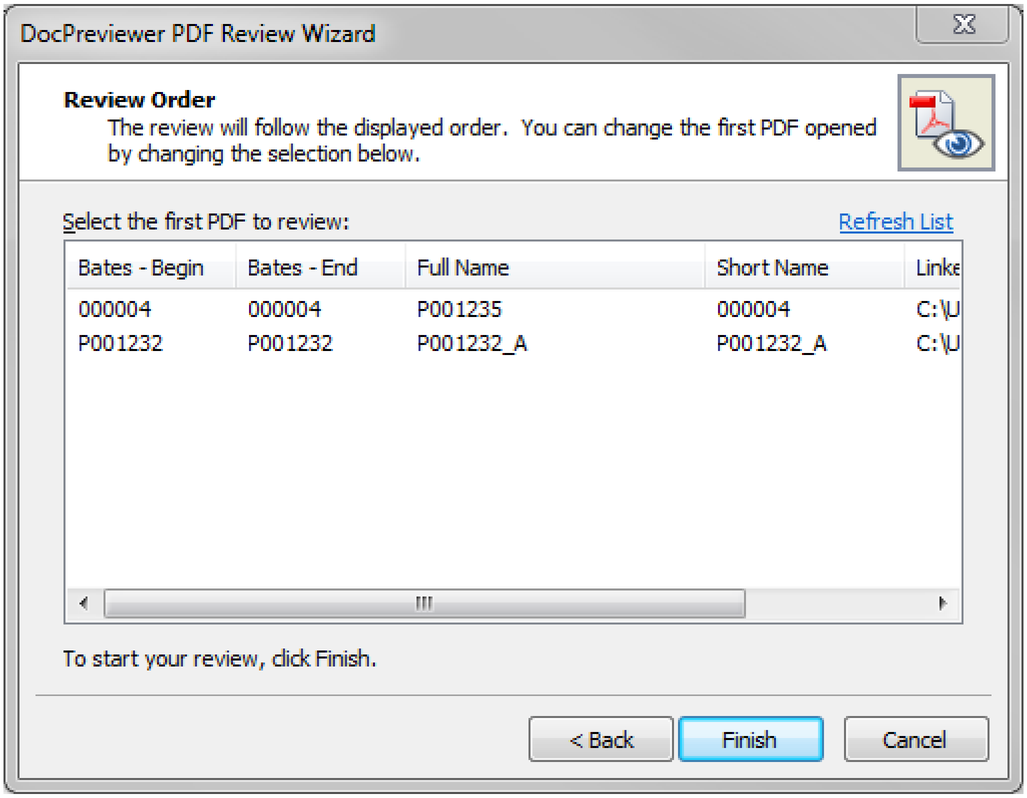
Select the CaseMap Spreadsheet to start reviewing: Documents

To view the PDF review order, click Next.

   If you choose Select a different PDF, then click on the spreadsheet where the file is linked. You can review linked files on any object spreadsheet or the Research - Authorities spreadsheet.

   If you have already reviewed PDF files in your current CaseMap work session, the default selection is the Last reviewed PDF.

6. In the **Review Order** dialog box, select the first PDF file you want to start the review, then click **Finish**.



**Review Order**
The review will follow the displayed order. You can change the first PDF opened by changing the selection below.

Select the first PDF to review:

| Bates - Begin | Bates - End | Full Name | Short Name | Linke |
|---|---|---|---|---|
| 000004 | 000004 | P001235 | 000004 | C:\U |
| P001232 | P001232 | P001232_A | P001232_A | C:\U |

To start your review, click Finish.

The PDF file now displays in Adobe Acrobat or Adobe Reader.

7. In the PDF file, click on the navigation buttons to page through previous or next linked PDF files in the spreadsheet.

8. Click the **End Review** button when you are finished.

During your review, if you find a text excerpt that should be included as a fact records in the Facts spreadsheet, highlight the text and click the Send Fact to CaseMap button to open the Send to CaseMap utility.

Related Topics

- About PDFs and DocPreviewer
- Importing PDFs
- Batch printing PDFs

## Importing Emails

### *About importing emails*

The easiest way to import emails into a case is to use the Send Email to CaseMap tool, which is part of CaseMap's DocManager add-in program. CaseMap already provides a default field mapping structure that imports source field data directly into your case spreadsheet fields. During the import process, a new spreadsheet record is automatically created for you. The email is saved as an .MSG file in a folder, and a link is created in CaseMap that opens the email for viewing in DocManager. Once emails are imported into a case, you can begin searching the content immediately after the indexing process completes.

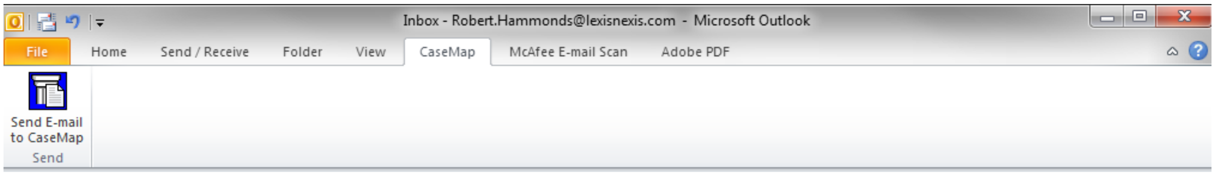
You can convert emails (Microsoft® Outlook® .PST files) to individual Adobe® Acrobat .PDF files (including attachments, and sender/recipient information) and then bulk import them into the Documents spreadsheet in your case. Links to the PDF source files are automatically created during the conversion and import process. Emails imported as PDFs include the date, full name, short name, authors, and recipients, as well as any Bates numbers associated with the document. See Converting emails to PDFs.

Related Topics

- About importing data
- About DocManager
- Send email to CaseMap
- About PDFs and DocPreviewer
- Converting emails to PDFs

### *Send email to CaseMap*

You can send emails from Microsoft® Outlook (2007 and later) to your CaseMap case.



During the import process, emails are saved as .msg files to a folder you select. CaseMap provides a default list of fields mapped between Outlook and CaseMap spreadsheets. You can edit the default field mappings as needed. See To map email fields. Once you map the fields, CaseMap will remember your settings for the next time you or another case user sends emails to the case.

You can also preview the email before importing to review field data contents, including an attachment count and the name of attachments.

Once emails are imported into CaseMap, you can begin searching the new data as soon as the indexing process completes. When you click the paperclip icon for the new record, the email displays in CaseMap's DocManager.

You can only send emails to CaseMap v10+ cases. If you have a CaseMap v9.0 (or earlier) case open, CaseMap will send a message stating that the previous version case is not supported.

The Send Emails to CaseMap tool is part of the DocManager add-in program. If you have not purchased DocManager, you cannot use this feature. Contact your CaseMap Sales Representative to learn more information about this product.

### To send an Outlook email to CaseMap

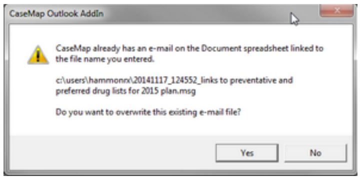
1. Open the CaseMap case that you want to import data into from Outlook.

   You must have the CaseMap case open in order to send an email to it.

2. In **Outlook**, locate the email to be sent to the case and click the 'Send Email to CaseMap' button on the toolbar.

   You can also right-click on the emails and then click 'Send Email to CaseMap'.

   If the selected email was previously linked to CaseMap, a Duplicate Records dialog screen displays.

   CaseMap already has an e-mail on the Document spreadsheet linked to the file name you entered.

   c:\users\hammonrx\20141117_124552_links to preventative and preferred drug lists for 2015 plan.msg

   Do you want to overwrite this existing e-mail file?

   In the **Send Email to CaseMap Duplicate Records** dialog box, perform one of the following:

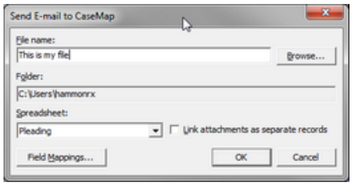
   - Click **Yes** to overwrite the record.
   - Click **No** and continue.

     1. In the **Change file name** dialog box, click **OK**.

        The Send E-mail to CaseMap dialog box opens.

     2. In the **File Name** box, change the file name and other pertinent information, and click **OK** to continue.

   If selected email was not previously linked to CaseMap, the Send Email to CaseMap dialog box opens.



File name: This is my file

Folder: C:\Users\hammonrx

Spreadsheet: Pleading

☐ Link attachments as separate records

a. Perform the following:

   - In the file name box, confirm the file name.
   - Click the Browse button, and in the 'Save Email as' dialog box, locate the folder to save the email, and then click Save.
   - In the Folder box, confirm the folder location.

   Emails are saved as .msg files, using the email subject as the file name.

All attachments will be stored in the Documents spreadsheet in CaseMap by default.

b. ⊟ Optional: Link attachments as separate records

   If you remove the check mark in the **Link attachments as separate records** check box the Spreadsheet box is enabled.

   1) Use the drop-down to select a spreadsheet from the list.
   2) Proceed to **Step c**.

c. Optional: Click the **Field Mappings** button to create/adjust field mappings.

   See To map email fields for more information.

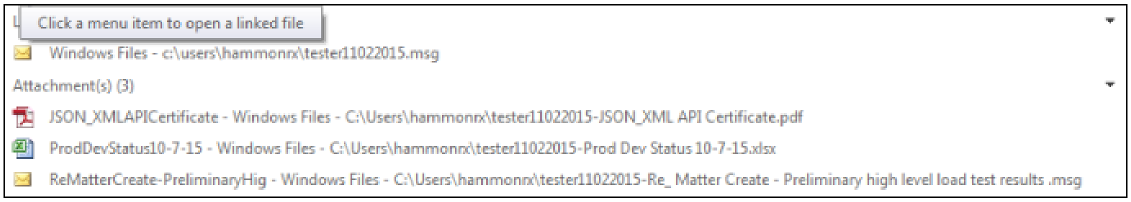
3. Click **OK** to initiate the import process.

   The email now displays in the Document spreadsheet with a link to the email in Outlook.

4. In **CaseMap**, go to the top of the Documents spreadsheet to see the new record created for the email.

The storage location (Documents spreadsheet) in CaseMap will be different if you chose a different spreadsheet above.

5. Click the **paperclip** icon for the record to display the linked file(s) information.



Windows Files - c:\users\hammonrx\tester11022015.msg

JSON_XMLAPICertificate - Windows Files - C:\Users\hammonrx\tester11022015-JSON_XML API Certificate.pdf

ProdDevStatus10-7-15 - Windows Files - C:\Users\hammonrx\tester11022015-Prod Dev Status 10-7-15.xlsx

ReMatterCreate-PreliminaryHig - Windows Files - C:\Users\hammonrx\tester11022015-Re_ Matter Create - Preliminary high level load test results .msg

Optional: Double-click on the paperclip to display the linked file in DocManager.

For more information, see About DocManager.

6. Optional: In **Outlook**, continue sending emails to CaseMap.
7. When you are finished, click the **Cancel** button in the **Send Email to CaseMap** dialog box.

### ⊟ To bulk send Outlook emails to CaseMap

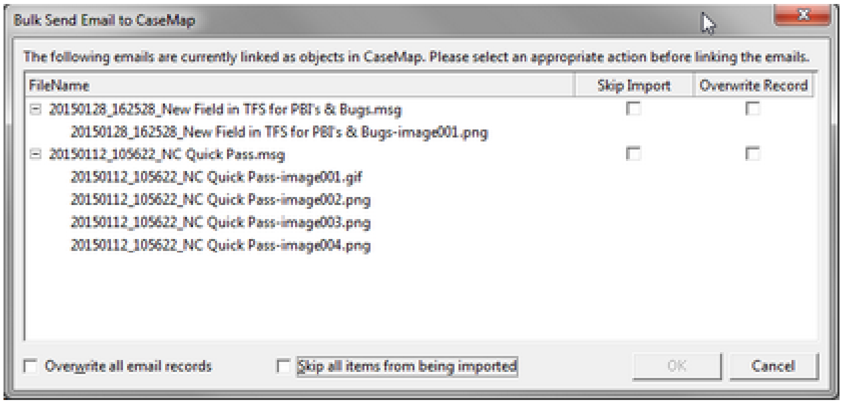
1. Open the CaseMap case that you want to import data into from Outlook.

> You must have the CaseMap case open in order to send an email to it.

2. In **Outlook**, locate the emails to be sent to the case and click the 'Send Email to CaseMap' button on the toolbar.

> You can also right-click on the emails and then click 'Send Email to CaseMap'.

⊟ If selected email(s) were previously linked to CaseMap, a Duplicate Records dialog screen displays.



Bulk Send Email to CaseMap

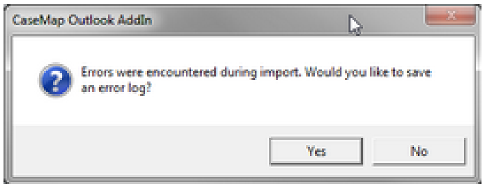
The following emails are currently linked as objects in CaseMap. Please select an appropriate action before linking the emails.

| FileName | Skip Import | Overwrite Record |
|---|---|---|
| ⊟ 20150128_162528_New Field in TFS for PBI's & Bugs.msg | ☐ | ☐ |
| 20150128_162528_New Field in TFS for PBI's & Bugs-image001.png | | |
| ⊟ 20150112_105622_NC Quick Pass.msg | ☐ | ☐ |
| 20150112_105622_NC Quick Pass-image001.gif | | |
| 20150112_105622_NC Quick Pass-image002.png | | |
| 20150112_105622_NC Quick Pass-image003.png | | |
| 20150112_105622_NC Quick Pass-image004.png | | |

☐ Overwrite all email records ☐ Skip all items from being imported

a. In the **Bulk Send Email to CaseMap Duplicate Records** dialog box, place a check mark beside the action (**Skip Import** or **Overwrite Record**) for each record listed.
b. Optional: Select the **Overwrite all email records** or the **Skip all items from being imported** check box to perform that action for all listed items.
c. Click **OK** to continue.

⊟ Conditional: Errors were encountered during import



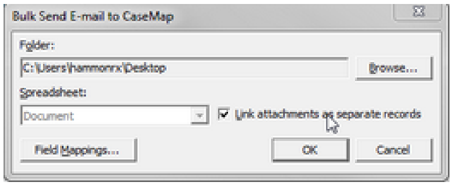
Errors were encountered during import. Would you like to save an error log?

1. Click **Yes** to save to error log.
2. In the **Save As** dialog box, choose a file storage location and click **Save**.

The Import Confirmation screen displays summarizing the number of records imported and/or skipped.

d. Click **OK** to continue.

⊟ If selected emails were not previously linked to CaseMap, the Bulk Send Email to CaseMap dialog box opens.



Folder: C:\Users\hammonrx\Desktop

Spreadsheet: Document

☑ Link attachments as separate records

a. Perform the following:

- In the Folder field, confirm the folder location.
- Click the Browse button, and in the **Save Email as** dialog box, locate the folder to save the email, and then click **Save**.

Emails are saved as .msg files, using the email subject as the filename.

> All attachments will be stored in the Documents spreadsheet in CaseMap by default.

b. ⊟ Optional: Link attachments as separate records

If you remove the check mark in the **Link attachments as separate records** check box the Spreadsheet box is enabled.

1) Use the drop-down to select a spreadsheet from the list.

2) Proceed to **Step c**.

c. Optional: Click the **Field Mappings** button to create/adjust field mappings.

See To map email fields for more information.

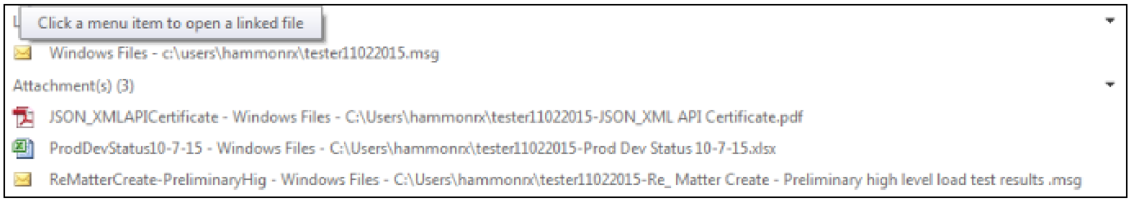
d. Click **OK** to initiate the process.

The Import Confirmation box displays displays.

3. Click **OK** to continue.
4. In **CaseMap**, go to the top of the Documents spreadsheet to see the new record created for the email.

> The storage location (Documents spreadsheet) in CaseMap will be different if you chose a different spreadsheet above.

5. Click the **paperclip** icon for this record to view the path and file attachments.



Windows Files - c:\users\hammonrx\tester11022015.msg

Attachment(s) (3)

JSON_XMLAPICertificate - Windows Files - C:\Users\hammonrx\tester11022015-JSON_XML API Certificate.pdf

ProdDevStatus10-7-15 - Windows Files - C:\Users\hammonrx\tester11022015-Prod Dev Status 10-7-15.xlsx

ReMatterCreate-PreliminaryHig - Windows Files - C:\Users\hammonrx\tester11022015-Re_ Matter Create - Preliminary high level load test results .msg

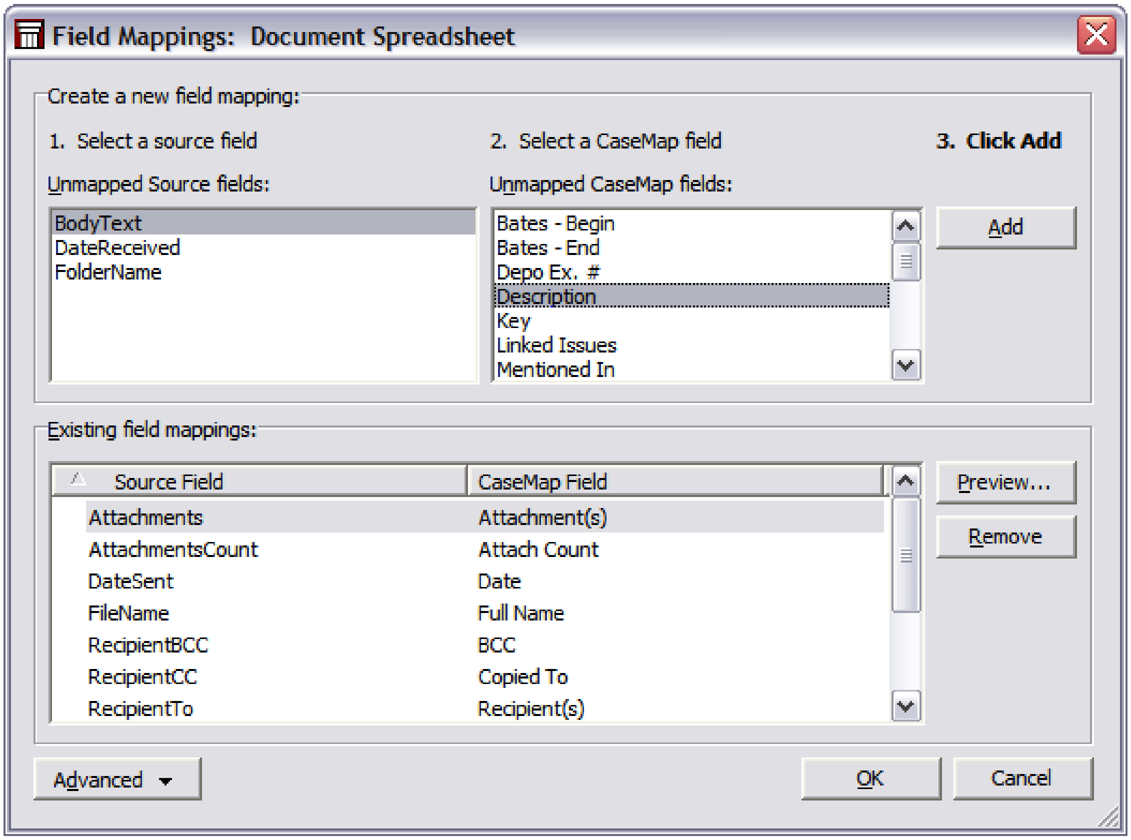
> Double-click the paperclip to open the file in CaseMap DocManager.

6. Optional: In **Outlook**, continue sending emails to CaseMap.
7. When you are finished, click the **Cancel** button in the **Send Email to CaseMap** dialog box.

### To map email fields

1. In **Outlook** , click the **Send Email to CaseMap** button to open the **Send Email to CaseMap** dialog box.
2. Click the **Field Mappings** button to display the **Field Mappings** dialog box.

   CaseMap provides a list of existing fields that are already mapped for you in the Existing field mappings box. You can modify the default list by clicking on the Remove button and re-mapping fields.


Field Mappings: Document Spreadsheet
Create a new field mapping:
1. Select a source field
2. Select a CaseMap field
3. Click Add
Unmapped Source fields:
Unmapped CaseMap fields:
Add
Existing field mappings:
Preview...
Remove
Advanced
OK
Cancel

Unmapped Source fields:
- BodyText
- DateReceived
- FolderName

Unmapped CaseMap fields:
- Bates - Begin
- Bates - End
- Depo Ex. #
- Description
- Key
- Linked Issues
- Mentioned In

| Source Field | CaseMap Field |
|---|---|
| Attachments | Attachment(s) |
| AttachmentsCount | Attach Count |
| DateSent | Date |
| FileName | Full Name |
| RecipientBCC | BCC |
| RecipientCC | Copied To |
| RecipientTo | Recipient(s) |

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** button to undo any existing field mappings.

   The fields will display in their respective boxes and will remain unmapped until you map them again.

### ⊟ To use advanced field mapping settings

Advanced field mapping settings allow you to add a source data field to field mappings list, and apply formatting to mapped fields (static text and hard returns). Once you send an email to CaseMap, the field mappings are share with other case users.

1. Click the **Advanced** button and then click **Advanced Mappings**.

2. In the **Document Spreadsheet fields** area, click your field mapping preference: **All fields**, **Mapped fields**, or **Unmapped fields**.

   This area defaults to displaying all mapped fields.

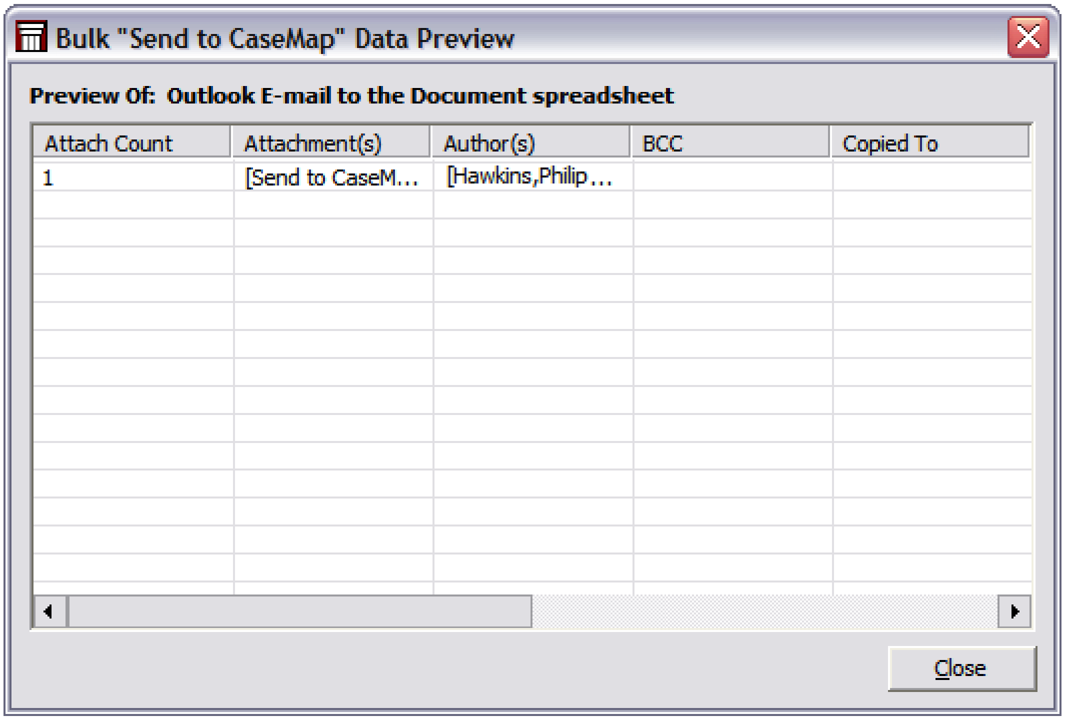
3. Select the field mapping structure you want to modify.
4. In the **Selected CaseMap Field** area, click the **Add**, **Modify**, or **Remove** buttons to review source field mapping types, apply formatting to fields, and to add/modify/delete a source data field.
5. In the **Display Options** area, select check boxes to omit prior or next fields if the field value is blank.
6. Select the **Link Object short names** check box to automatically link short names for the selected field.

   This option only works in Description fields.
7. Select the **Always update** field to enable this option for the selected field.
8. Click **OK** to save your changes.
9. In the Field Mappings dialog box, click **OK** when you are finished.
10. In the **Send Email to CaseMap** dialog box, click **Cancel** to exit the tool.

> To reset field mappings to the default structure, click the Advanced button and click Reset to Default Mappings.

### To preview emails prior to sending

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.



**Preview Of: Outlook E-mail to the Document spreadsheet**

| Attach Count | Attachment(s) | Author(s) | BCC | Copied To |
|---|---|---|---|---|
| 1 | [Send to CaseM... | [Hawkins,Philip... | | |

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.

### To save a list of field mappings

1. In **Outlook**, click the **Send Email to CaseMap** button.

1. In the **Send Email to CaseMap** dialog box, click the **Field Mappings** button.

2. In the **Field Mappings** dialog box, click the **Advanced** button and then click **Save Mappings to File**.

3. In the **Save As** dialog box, navigate to the folder where you want to save the field mapping file.

Field mappings are saved as a .cmbulkmap file.

4. In the **File name** field, type a name for the field mappings.
5. Click **Save**.
6. In the **Field Mappings** dialog box, click **Close**.
7. In the **Send Email to CaseMap** dialog box, click **OK** to exit the utility.

Related Topics

About the Send to CaseMap tool
About DocManager

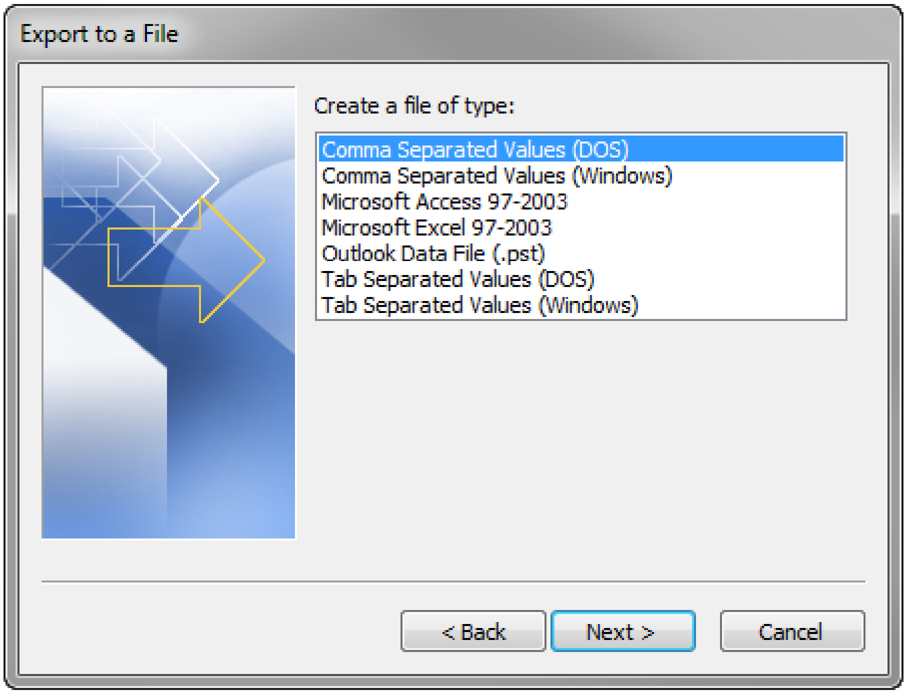
### *Receiving client emails*

Clients may not know how to send you a copy of emails in their Microsoft Outlook folders. The following instructions will help them with this process.

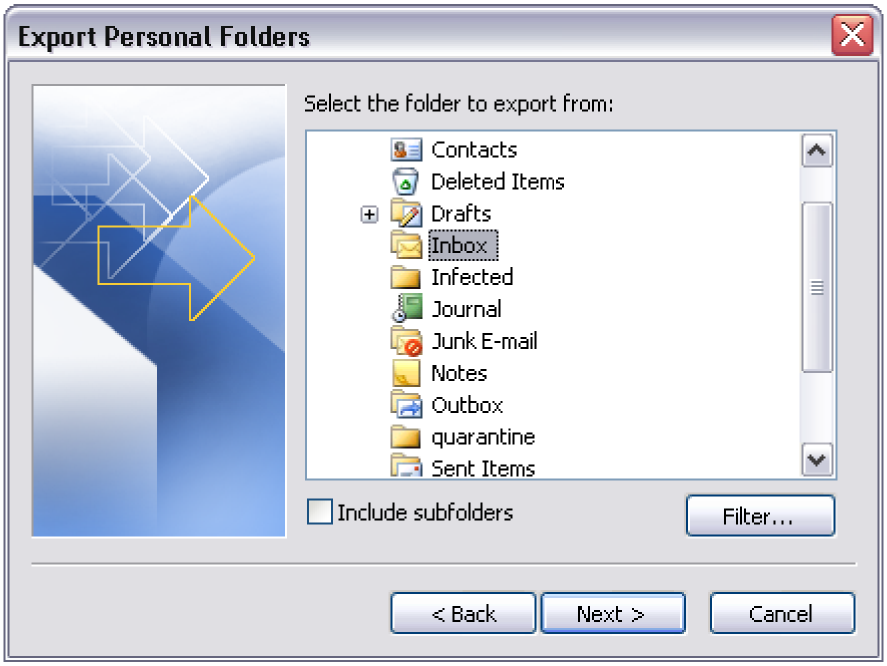
#### ⊟ To help clients send you email files for the document collection

Clients may not know how to send you a copy of emails in their Microsoft Outlook folders. The following instructions will help them with this process.

1. Open **Microsoft Outlook**.
2. On the **File** menu, click **Options**, and then click on the **Advanced** menu.
3. Click the **Export** button.
4. In the **Import and Export Wizard**, click **Export to a file**, then click **Next**.
5. In the **Export to a File** dialog box, click **Outlook Data File (.pst)**, then click **Next**.


Export to a File
Create a file of type:
Comma Separated Values (DOS)
Comma Separated Values (Windows)
Microsoft Access 97-2003
Microsoft Excel 97-2003
Outlook Data File (.pst)
Tab Separated Values (DOS)
Tab Separated Values (Windows)
< Back
Next >
Cancel

6. In the **Export Outlook Data File** dialog box, select the folder that contains the emails you want to export, then click Next.

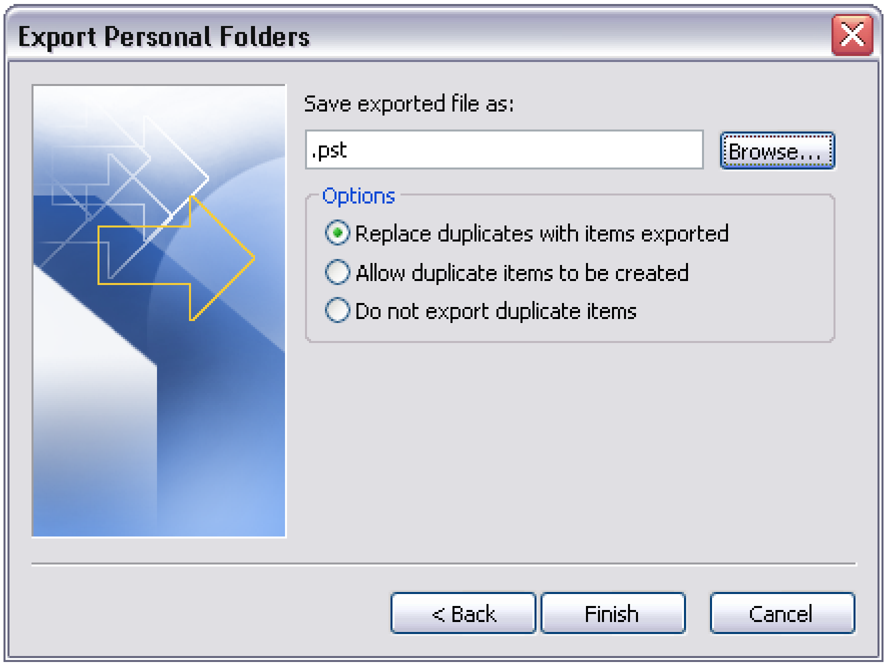

Export Personal Folders
Select the folder to export from:
Contacts
Deleted Items
Drafts
Inbox
Infected
Journal
Junk E-mail
Notes
Outbox
quarantine
Sent Items
☐ Include subfolders
Filter...
< Back
Next >
Cancel

Select the Include subfolders check box, if needed.

7. In the **Export Personal Folders** box, click the **Browse** button to navigate to the location where you want the email folder saved.

8. In the **Open Personal Folders** box, type in a file name for the .pst file, then click **OK**.

9. In the **Save exported file as** dialog box, select the applicable option for duplicate handling, then click **Finish**.



Export Personal Folders

Save exported file as: .pst

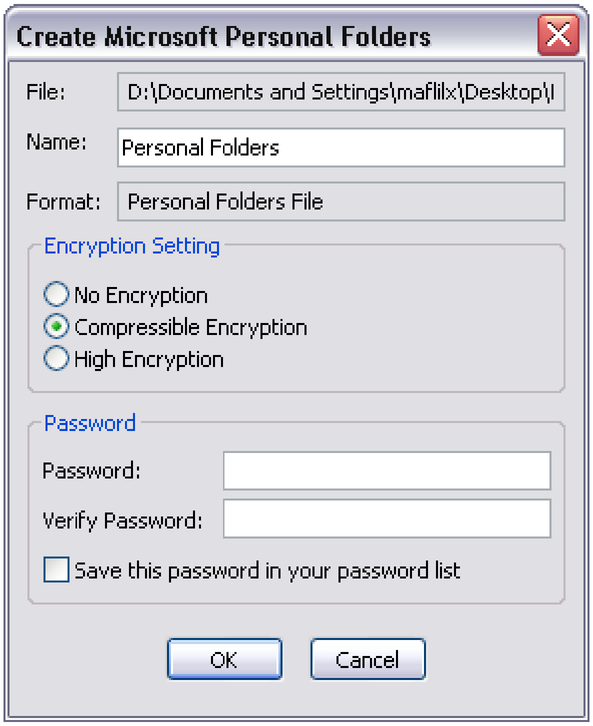
Options

● Replace duplicates with items exported

○ Allow duplicate items to be created

○ Do not export duplicate items

10. In the **Create Microsoft Personal Folders** box, select an encryption setting and password (if needed), then click **OK**.



Create Microsoft Personal Folders

File: D:\Documents and Settings\maflilx\Desktop\I

Name: Personal Folders

Format: Personal Folders File

Encryption Setting

○ No Encryption

● Compressible Encryption

○ High Encryption

Password

Password:

Verify Password:

☐ Save this password in your password list

It is not necessary for clients to set a password.

The .pst file is now saved to the location specified.

11. Close the **Microsoft Outlook** application.

    This step is very important, otherwise the .pst file will not save properly. It may also take several minutes to save close Outlook.

12. Navigate to the folder location where the .pst file is stored.

    Email Export.pst

13. Right-click on the file and select a Zip option, like WinZip.
14. Restart **Microsoft Outlook**.
15. Have the client attach the zipped .pst file in an email and send it to you.

> The exported .pst file may also be burned to a CD or copied to a portable memory storage device like a USB memory stick. If you receive the .pst file on a CD, you must save it on your hard drive before importing the files into Outlook. You can import the file directly from the memory stick.

### To receive clients emails sent as attachments

If your client has numerous folders of emails, you may want them to be sent as separate emails. Clients may send these emails as attachments.

1. Create folder(s) in **Microsoft® Outlook** where you can file the client emails.
2. When you receive all the emails, click on one of the attachments, then press **CTRL + A** to select all attachments.
3. Click and drag them to the appropriate folder.

   This process may take a few minutes, especially if you have a lot of emails to copy.

4. Once the selected emails are transferred, repeat these steps as necessary.

### To receive client emails in a zipped .PST file

If your client sends you a zipped .PST file of emails, you will need to save this file to a desktop folder because Microsoft does not recommend using .PST files across a network.

1. Save the .PST file attachment to a desktop folder that you can find later.
2. Open **Microsoft Outlook**.
3. On the **File** menu, select **Import and Export**, then click **Next**.
4. In the **Import and Export Wizard**, select **Import from another program or file**, then click **Next**.
5. In the **Import a File** dialog box, select the **Personal Folder File (.pst)**, then click **Next**.
6. In the **Import Personal Folders** dialog box, click **Browse** to find the .pst file you want to import.

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. Choose where to import the folder.

   Personal Folders will make it part of your Inbox.

10. Click **Finish** to complete the process.

> If you are working in a multi-user environment, we recommend that you do not put the emails in Microsoft Outlook because other case staff will not be able to access the files. We recommend that you use DocPreviewer's Converting emails to PDFs utility and import the PDF version of the emails into the case.

Related Topics

About importing emails
Send emails to CaseMap

### *Converting emails to PDFs*

The Emails to PDF wizard is part of the DocPreviewer premium feature set, which requires and additional subscription. The Emails to PDF wizard allows you to convert Microsoft® Outlook emails in one or more folders to Adobe® Acrobat PDF files. The conversion utility guides you to choose an Outlook folder(s) to convert to PDF files, select a network folder in which to store the saved PDF files, and then import the emails into CaseMap.

During the import process, CaseMap populates the Attachments field with a number of attachments for an email. However, email attachments do not import automatically. To locate imported emails with attachments, perform a search in CaseMap and then use the Review PDFs tool (in DocPreviewer) to open the attachment in Adobe® Acrobat or Reader. Next use the Send to CaseMap feature to link the document to the case record in CaseMap.

Once the conversion process completes, the wizard then imports the emails into CaseMap with the option of populating the Persons spreadsheet with the sender and recipient names, as well as Bates stamping the files. During this process, all emails are automatically linked to the case records in the Documents spreadsheet. Email metadata is saved in a separate file with the .metadata extension and the same name as the PDF file.

#### ***Email conversion options include:***

- Emails still stored in Microsoft Outlook
- Emails stored as a .PST file on a CD or DVD
- Emails stored as .PST files in a network folder

***The Emails to PDF utility is accessible from the following locations:***

- File tab > Import > Emails from Outlook
- Tools menu > Email to PDF Wizard

If you are using a document management system (DMS), please check with your Litigation Support Manager or IT department before converting emails to PDFs. Since they are already linked in the case to the DMS, you don't need to make a duplicate copy of them on your server.

The Emails to PDFs wizard is part of DocPreviewer, a CaseMap add-in program that requires an additional subscription. DocPreviewer is available for a free 30-day trial period that starts the first time you use it. After the trial period, the feature is no longer accessible until you purchase a subscription to DocPreviewer.

* We also recommend you use the Import Linked Files Wizard to import emails into your case. See About importing data and Importing linked files.

We encourage you to use the Send Emails to CaseMap feature that is part of CaseMap's DocManager add-in program. You can send emails from Microsoft Outlook 2007 and 2010 directly to your case file. You must have a subscription to DocManager to use this feature. See About DocManager and Send emails to CaseMap.

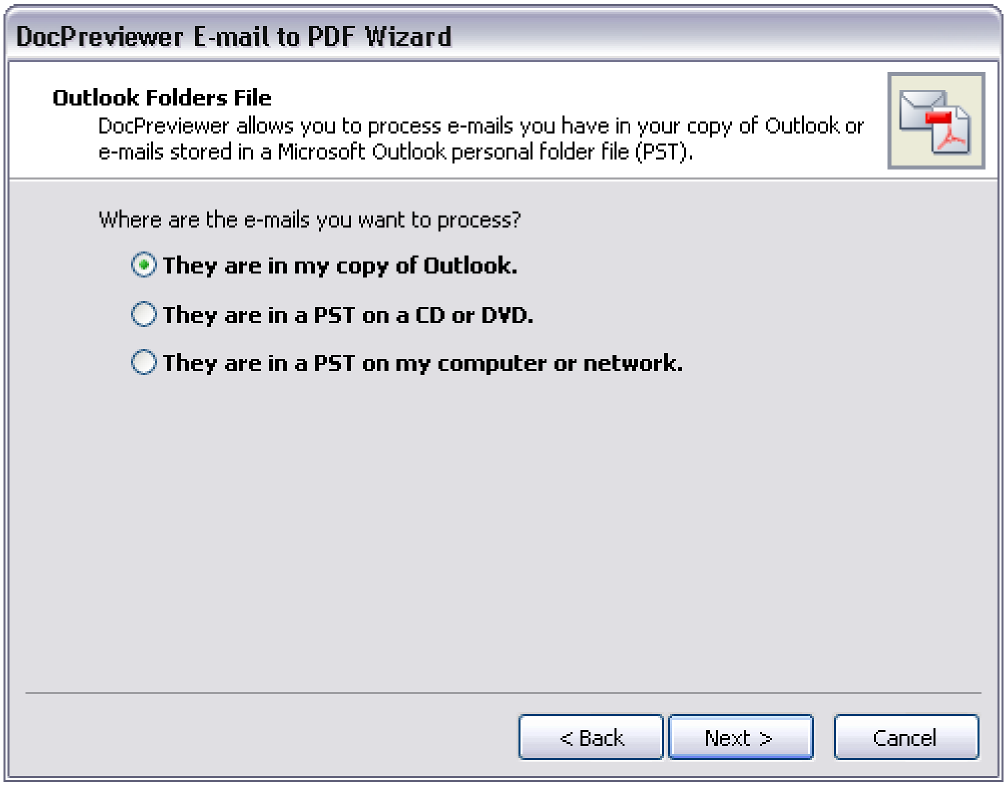
### To convert emails to PDFs

1. On the **File** menu, click **Import**, and then click **Import Emails from Outlook**.

   You can also click on the Tools menu and then click E-mail to PDF Wizard.

2. In the **DocPreviewer Email to PDF Wizard**, click **Next**.

3. In the **Outlook Folder File** dialog box, select the location of the emails you want to convert, then click **Next**.



DocPreviewer E-mail to PDF Wizard

**Outlook Folders File**

DocPreviewer allows you to process e-mails you have in your copy of Outlook or e-mails stored in a Microsoft Outlook personal folder file (PST).

Where are the e-mails you want to process?

● They are in my copy of Outlook.

○ They are in a PST on a CD or DVD.

○ They are in a PST on my computer or network.

If the folder already contains PDF files, they will not be overwritten — even if they were created from the same emails.

4. In the **Outlook Folders** dialog box, navigate to the folder that contains the emails to convert, then click **Next**.

5. Review your selected conversion options, then click **Next** to initiate the process.

6. Select what you want to do with the converted PDFs and review the conversion summary options:
    - Import the emails, senders, and recipients into the Document spreadsheet in your case
    - Bates stamp the PDFs. After Bates stamping you will have the option to import the emails, senders, and recipients.
    - Do nothing.

7. When the conversion process is complete, return to the **Documents** spreadsheet to review the imported email records.

Related Topics

About PDFs and DocPreviewer

About importing emails

Importing emails

### *Importing emails*

CaseMap's Outlook Email Linker has been removed from the File tab's Import submenu. We encourage you to use the new Import Linked Files Wizard to import your emails into your CaseMap case. For more information, see Importing linked files. If you would still like to use this tool, you will need to add the Outlook Email Linker menu to the File tab's Import Submenu.

If you have emails in your Microsoft® Outlook folder that need to be included as part of the case, you can import the emails in the folder and link them into a case using the Outlook Email Linker tool. The emails are imported into the Documents spreadsheet and retain links directly back to the email file in Outlook. Each email record's Linked File cell displays the file path. CaseMap also tracks emails already imported, so you can perform the import again on that email folder without duplicating document records.

The Import Emails from Outlook utility guides you through the steps of selecting a folder of emails in Outlook to import as well as the mapping process used between both Outlook and the case document index. The utility will store the mappings for future use. To clear saved settings, press the SHIFT key while launching the utility. CaseMap does not link to emails in Outlook Express.

> We highly recommend that you use the Import Linked Files Wizard to import emails into your CaseMap case. See Importing linked files.
>
> Emails stored in your local Microsoft Outlook folder and linked to case records in CaseMap are not accessible to other case staff. CaseMap's DocPreviewer add-in program (Convert E-mails to PDFs feature) can convert Outlook .PST emails into PDF files that can be stored in a network folder and linked to case records, and viewable in DocPreviewer. CaseMap's Send Emails to CaseMap tool saves Outlook emails as .MSG files that are saved in a network folder and linked to case records viewable in the CaseMap Document Viewer.

#### To import emails in Outlook

1. Open **Microsoft Outlook** and navigate to the folder that is storing the emails you want to import.

2. Open **CaseMap**, and on the **File** menu, click **Import**, and then click **Import Emails from Outlook**.

3. When the **DocPreviewer E-mail to PDF Wizard** opens, select one of the following options to locate the emails you want to process:

    - They are in my copy of Outlook
    - They are in a PST on a CD or DVD.
    - They are in a PST on my computer or network.

4. Click **Next**.

5. In the **Choose one or more Outlook folders to convert** dialog box, select the appropriate check box to identify where the files are located, and then click **Next**.

7. In the **Choose a folder to receive converted PDF files** dialog box, browse to/identify

the folder to receive the files, and click **OK**.

8. Click **Next** to continue.

9. In the **How do you want the emails sent time to appear in the PDF** dialog box, select an appropriate format regarding how you want the Date format to display, and then click **Next**.

10. In the **Please review your selections** box, review your selections, and click **Next** to continue.

11. In the **Conversion Competed** box, review the conversion summary, and then select the appropriate check box to determine what you want to do next.

12. Click **Next**.

13. When the DocPreviewer E-mail to PDF wizard successful completion box displays, click **Finish**.

14. In the **Send PDFs to CaseMap Utility**, click **Next** to continue.

15. Select the PDF files you want to send to CaseMap and then click **Next**.

16. In the **Confirm CaseMap case and spreadsheet** box, review/confirm the file(s), and then click **Next**.

17. In the **Choose Document field mappings** box, select all that is appropriate, and then click **Next** to continue.

18. In the **PDF E-mail Preview** box, review the summary, and then click **No** if you do not want to customize field mappings, otherwise click **Yes**.

19. Click **Next** to continue.

20. In the **Review and begin sending to CaseMap** box, review the summary of actions, and then click **Finish** to send the PDFs to CaseMap.

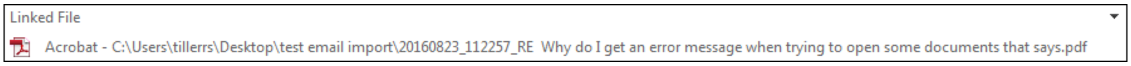
21. In the Acrobat message box, click **OK** to acknowledge the message.

22. Optional: In Adobe Acrobat, you may open each document for review.

23. Return to the **CaseMap** to verify the email import.

24. Notice there are no Bates numbers for these records since you are linking directly to Outlook to access the file.

25. Click on a document record's paperclip icon to display the linked path to Outlook and to view the document in Outlook.



Linked File

Acrobat - C:\Users\tillerrs\Desktop\test email import\20160823_112257_RE  Why do I get an error message when trying to open some documents that says.pdf

## ⊟ To import emails saved as PDF files

CaseMap's DocPreviewer Adobe PDF integration features give you the ability to import one or multiple emails into a case's Document spreadsheet. Imported document records are automatically linked to the PDF file stored in a network folder. DocPreviewer uses the Send to Multiple PDFs utility that checks for previously imported and linked PDF files and ignores them, so you can run the import wizard multiple times on the same folder without creating duplicate document records in CaseMap.

You can also import PDF files using the Import Documents Wizard.

For more information, see the Importing PDFs help topic.

Related Topics

About importing emails

## 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 sub-folders, all files in each sub-folder will be selected for the import as well. CaseMap also allows you to specify the source of the files that are imported.

CaseMap recognizes duplicate documents imported from the same folder. However, if you have the same document stored in two folders, CaseMap will not recognize the duplicate and will create a new record and link to it in the other folder location.

You can choose the option to capture document metadata during the import process. This provides an automated process to extract metadata and map the information automatically into an object spreadsheet. For any unmapped data, you have the option to create a load file, import into a pre-existing field, or ignore.

⚠ CaseMap does not automatically create fields for metadata import.

You can choose to remove files during the import, particularly if a file seems too large. Large files will slow the import process during a bulk import.

You can cancel the import at any time. CaseMap will send a message indicating how many files were successfully imported before the process was canceled.

After the import, CaseMap indexes all new file content. You can begin searching the updated case data as soon as the index process completes. For more information, see About the case index.

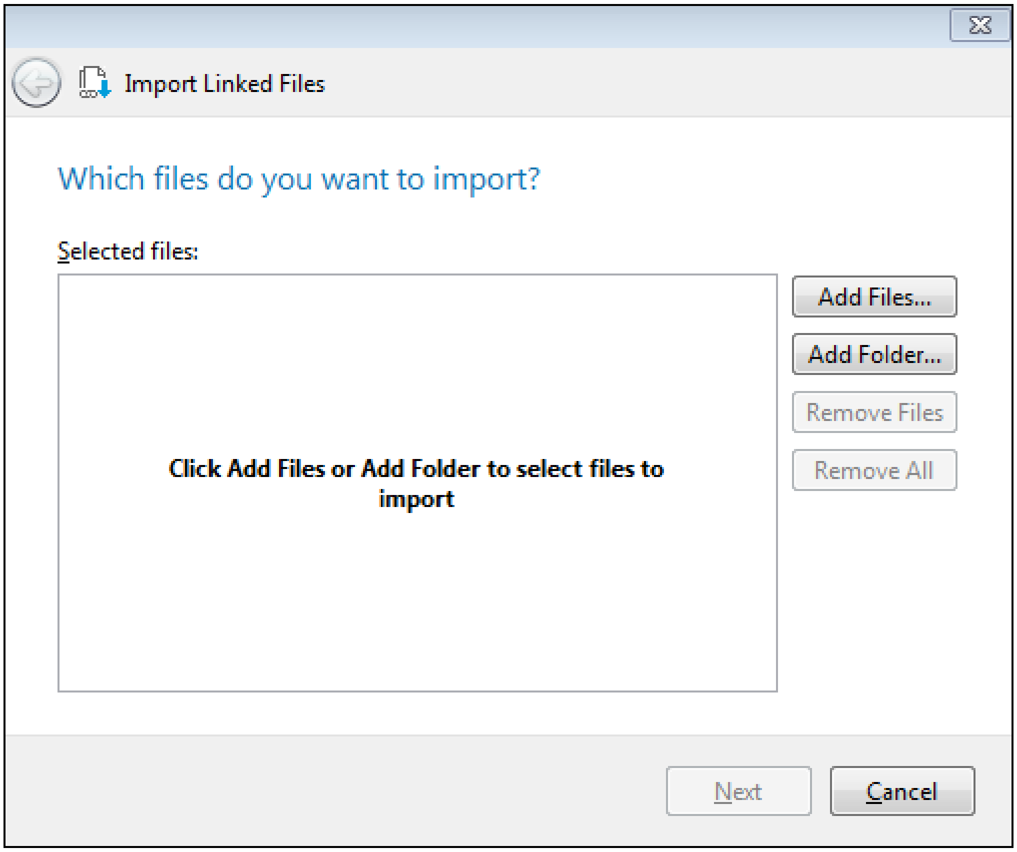
***You can import the following file types:***

- Microsoft Office files (.doc, .docx, .xls, .xlsx, .ppt, .pptx, .eml)
- PDF files (.pdf)
- Image files (.tiff, .tif, .gif, .jpg, .jpeg, .bmp, .emf., and .wmf)

Once a file has been imported to the Documents spreadsheet, click the paperclip icon once to display the link/path to the object record. If you double-click on the paperclip icon, the object record opens.

### To bulk import documents

1. On the **File** menu, click **Import** and then click **Import Linked Files from a Folder**.
2. In the **Import Linked Files** dialog box, click one of the following:
   - **Add Files** to select one or more files to import
   - **Add Folder** to import all files within a folder



Which files do you want to import?

Click Add Files or Add Folder to select files to import

CaseMap identifies duplicate files based on directory paths. If a file in a folder has already been added to the case, the document will be skipped during the import process. If you have a file stored in two folders, CaseMap will not recognize the duplicate and will create a new record and link to it in the other folder location.

4. In the **Import Linked Files** dialog box, navigate to the folder where the files are saved.

   If you selected Add Folder, you will navigate to the folder when the Browse for Folder dialog box displays.

   If the folder contains subfolders, click Yes in the message box to import all files in each subfolder.

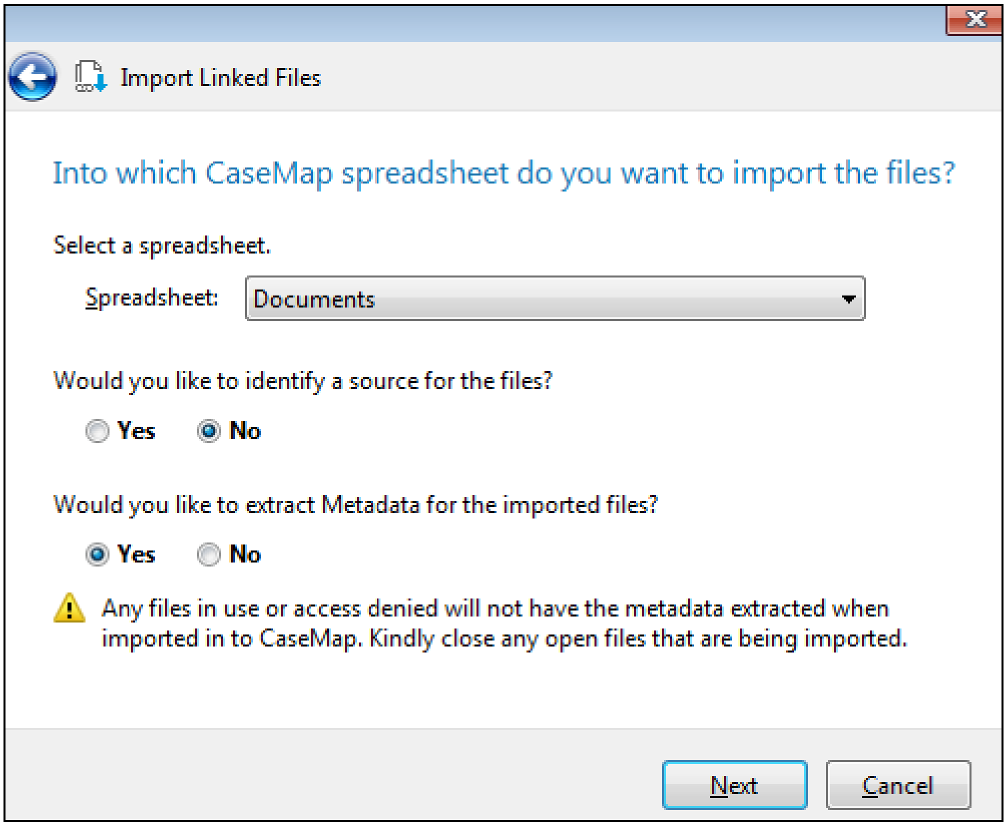
The files now display in the Selected files box.

6. Review the selected files to ensure that you want to import them.

   If you want to delete one or more files selected for the import, click the Remove Files button.

   If you want to delete all files selected for the import, click the Remove All button.

7. Click **Next**.



Import Linked Files

Into which CaseMap spreadsheet do you want to import the files?

Select a spreadsheet.

Spreadsheet: Documents

Would you like to identify a source for the files?

○ Yes ● No

Would you like to extract Metadata for the imported files?

● Yes ○ No

⚠ Any files in use or access denied will not have the metadata extracted when imported in to CaseMap. Kindly close any open files that are being imported.

8. In the **Spreadsheet** drop-down list, select the spreadsheet for which you want to import the files.

9. In the **Would you like to identify a source for the files?** area of the dialog box, click **Yes** to identify the source of the files, or click **No** if you do not want to identify the source of the files.

10. In the **Would you like to extract Metadata for the imported files?** area of the dialog box, click **Extract** to extract metadata, or click **Do not extract** if you do not want to extract the metadata.

⚠ Any files in use or access denied will not have the metadata extracted when imported into CaseMap. Close all files and grant permissions before import.

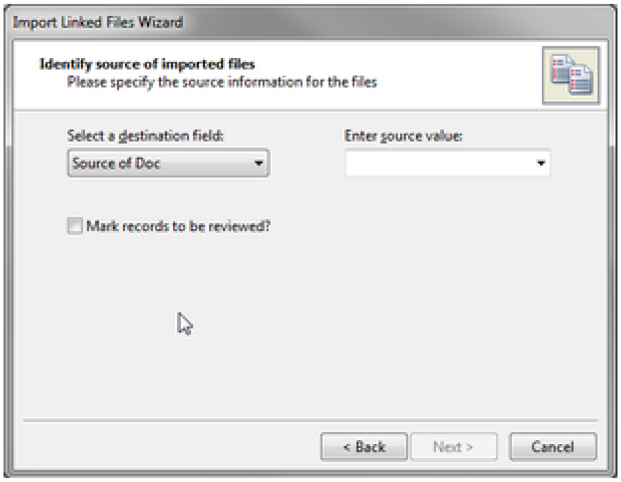
⚠ CaseMap supports file imports up to 1GB per file. If the file size is larger than 1GB, you might encounter system errors.

11. Perform one of the following:

    If you clicked Yes to **identify a source for the files**, click Next to continue.

    If you clicked No, proceed to Step 18.

12. In the **Select a destination field** box, use the drop-down arrow to select the destination field.



Identify source of imported files

Please specify the source information for the files

Select a destination field: Source of Doc

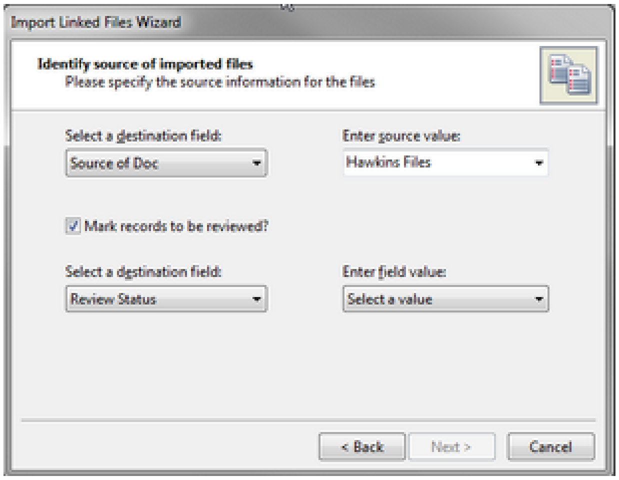
Enter source value:

☐ Mark records to be reviewed?

13. In the **Enter field value** box, use the drop-down arrow to select/enter a source value up to a maximum of 35 characters.

14. Optional: Select the **Mark records to be reviewed?** check box to identify records that are to be reviewed.

    If the Mark records to be reviewed check box is selected, the 'Select a destination field' is displayed.



Identify source of imported files

Please specify the source information for the files

Select a destination field: Source of Doc

Enter source value: Hawkins Files

☑ Mark records to be reviewed?

Select a destination field: Review Status

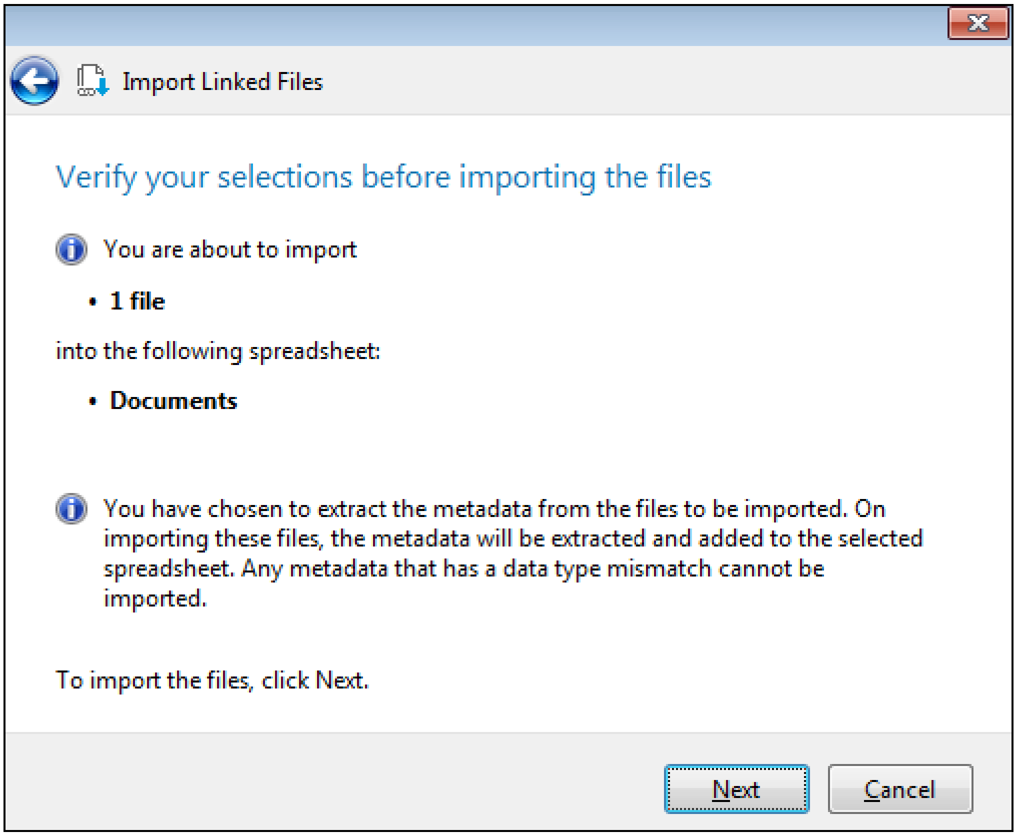
Enter field value: Select a value

15. In the **Select a destination field** dialog box, **Select Field** has been entered as the default value. Use the drop-down arrow to select the destination field.

16. In the **Enter field value** box, enter/type in a field value.

17. Click **Next** to continue.

18. In the **Verify your selections before importing the files** dialog box, review the files and spreadsheet you selected for the import.



Verify your selections before importing the files

You are about to import

- **1 file**

into the following spreadsheet:

- **Documents**

You have chosen to extract the metadata from the files to be imported. On importing these files, the metadata will be extracted and added to the selected spreadsheet. Any metadata that has a data type mismatch cannot be imported.

To import the files, click Next.

If you have chosen to extract the metadata from the files to be imported, the metadata will be extracted and added to the selected spreadsheet. Any metadata that has a data type mismatch is not imported.

19. Click **Next** to initiate the import process.

20. If you have chosen to extract the metadata and there is unmapped data, the **What do you want to do with unmapped metadata?** dialog box appears.

    Perform one of the following options:

    - Create load file of all metadata for the unmapped metadata records
    - Import unmapped metadata into a pre-existing field
    - Ignore unmapped metadata from being imported

21. Click **Next**.

If you select the option to import unmapped metadata into a pre-existing field, you are given the option to choose a field to map the metadata.

⚠ Any metadata extracted that exceeds the size of the field will be discarded.

If you select the option to create a load file, you are given the option to select a location to save the load file of unmatched metadata.

⚠ Metadata extracted into fields with restrictions or revoked permissions is identified as unmapped metadata.

22. Review the number of files imported, then click **Finish**.

    The new records display in the selected spreadsheet.

23. In the appropriate spreadsheet (e.g., **Documents**), click the **paperclip icon** next to the imported record once to display the link/path of the object record, or double-click on the **paperclip icon** icon to open the object record and verify its content.

Related Topics

About importing data

Batch printing linked documents

## Importing text files

You can import data from a Microsoft® Word table or Excel spreadsheet into CaseMap spreadsheets. Save the document or spreadsheet in a tab delimited text file for best results. Sometimes data clean-up prior to the import is necessary. We recommend that you try your import on a copy of the case to ensure the import is satisfactory before imported the content in the active case.

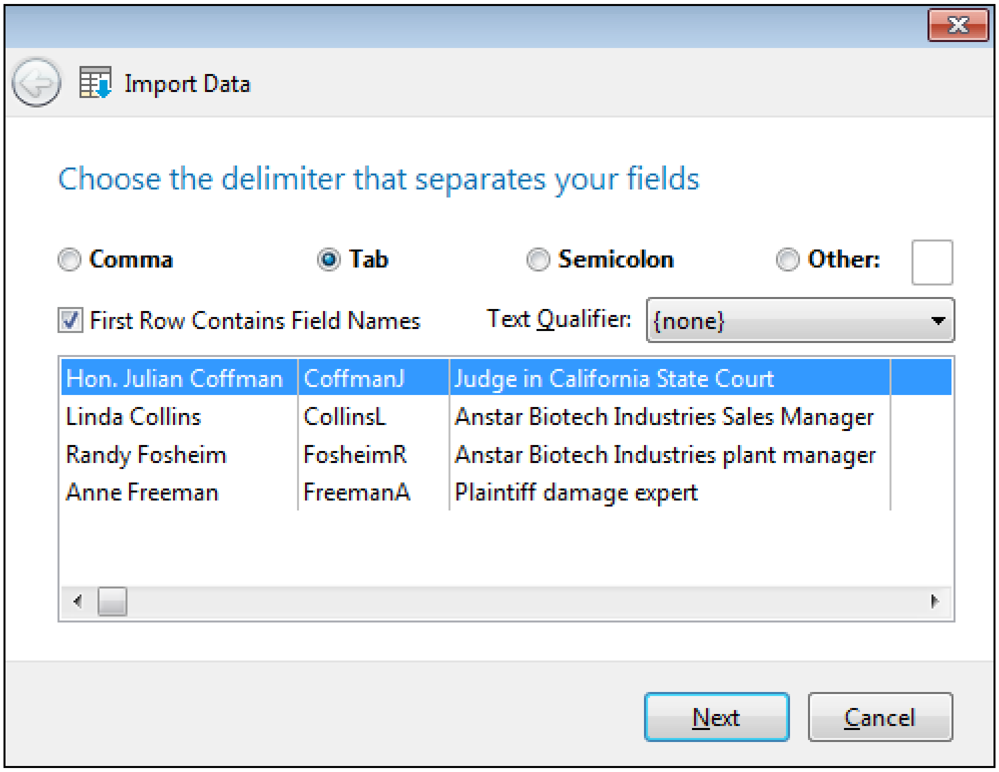
If the file you are importing contains full names, we recommend that you find/replace the full names with short names in source file before importing the data into CaseMap. Otherwise, you will need to find/replace all full names in every field, in each spreadsheet, which can be a time-consuming process.

### To import delimited text files

1. Before the import, make a backup copy of the case.

   If the import does not produce the desired results, you restore the backup copy.

2. Next verify whether any other users are logged into the case and ask them to exit it until you have completed the process.
3. On the **File** menu, click **Import** and then click **Import Records from a Text File**.
4. In the message box to make a backup copy of the case, click **Yes** to open the **Backup and Restore wizard.** Click **No** to continue if you have already backed up the case.
5. In the **Select File to Import** dialog box, navigate to and select the file you want to import, then click **Open**.
6. In the **Import Data** box, select the delimiter that separates your fields: **Comma**, **Tab**, **Semicolon**, or **Other**.



Choose the delimiter that separates your fields

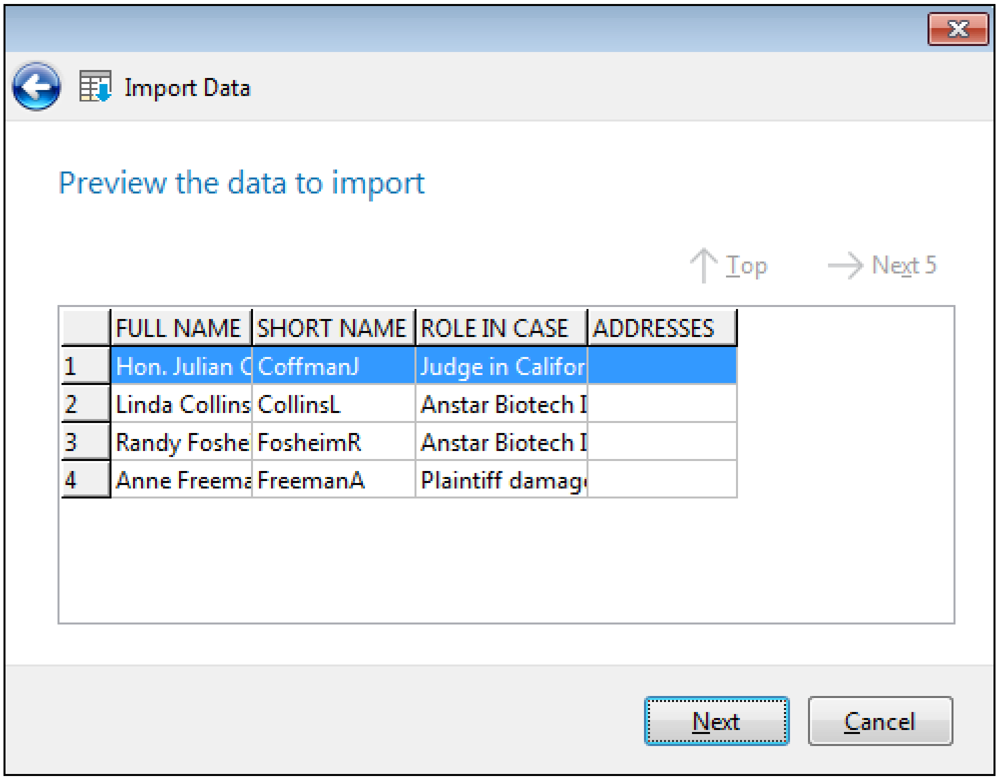
○ Comma ● Tab ○ Semicolon ○ Other: ☐

☑ First Row Contains Field Names

Text Qualifier: {none}

| | | |
|---|---|---|
| Hon. Julian Coffman | CoffmanJ | Judge in California State Court |
| Linda Collins | CollinsL | Anstar Biotech Industries Sales Manager |
| Randy Fosheim | FosheimR | Anstar Biotech Industries plant manager |
| Anne Freeman | FreemanA | Plaintiff damage expert |

7. Select the **First Row Contains Field Names** box, if this applies to the text file, then click **Next**.
8. In the **Preview the data to import** dialog box, review the selected data, then click **Next**.

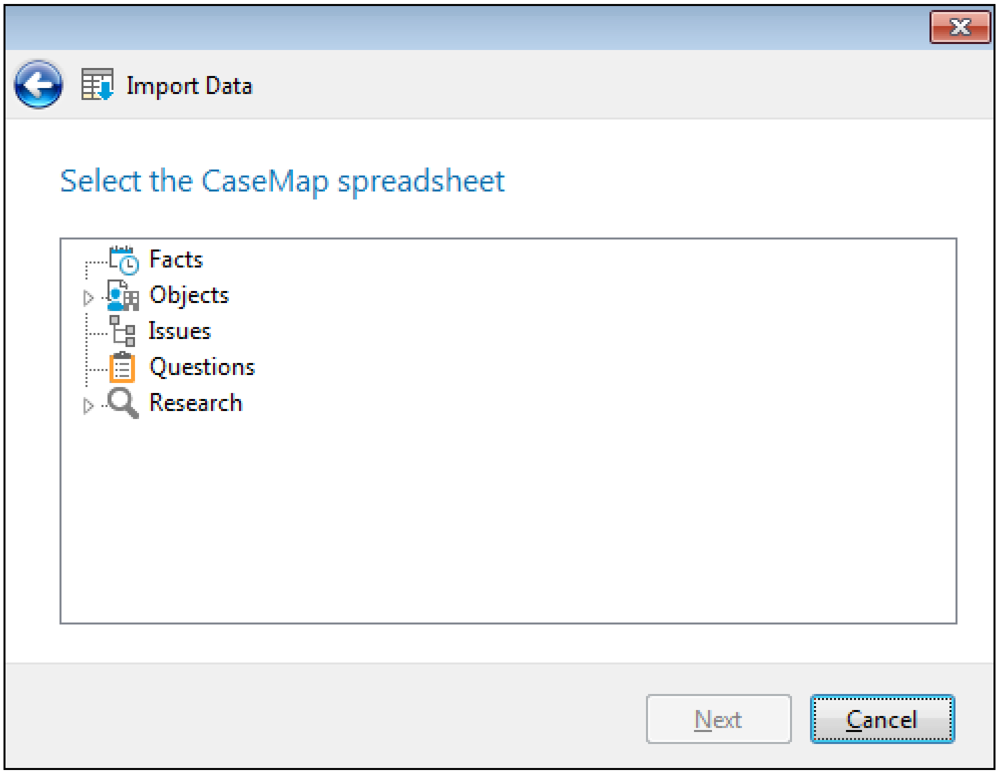


Preview the data to import

| | FULL NAME | SHORT NAME | ROLE IN CASE | ADDRESSES |
|---|---|---|---|---|
| 1 | Hon. Julian C | CoffmanJ | Judge in Califor | |
| 2 | Linda Collins | CollinsL | Anstar Biotech I | |
| 3 | Randy Foshe | FosheimR | Anstar Biotech I | |
| 4 | Anne Freema | FreemanA | Plaintiff damag | |

Click the Next 5 and Top buttons to navigate the import data.

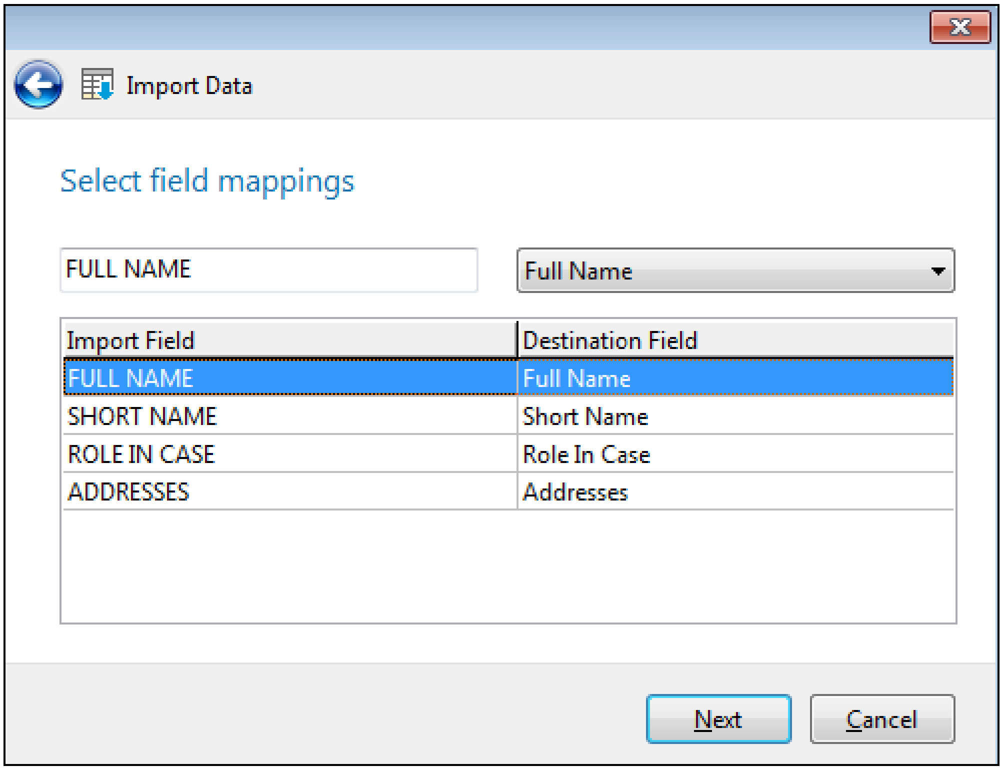
9. In the **Select the CaseMap spreadsheet** dialog box, click on the spreadsheet for which you want to import data, then click **Next**.


Import Data
Select the CaseMap spreadsheet
Facts
Objects
Issues
Questions
Research
Next
Cancel

10. In the **CaseMap spreadsheet** dialog box, select the spreadsheet in which you want to import data, then click **Next**.

    If you are importing objects, select the object type spreadsheet, then click Next.

11. In the **Select field mappings** dialog box, map the import fields from the text file to the destination fields in the spreadsheet.



Select field mappings

FULL NAME

Full Name

| Import Field | Destination Field |
|---|---|
| FULL NAME | Full Name |
| SHORT NAME | Short Name |
| ROLE IN CASE | Role In Case |
| ADDRESSES | Addresses |

12. Select the field you want to map in the **Import Field** list.

13. In the **Select Field Mappings** drop-down list, select the CaseMap field (Destination field) where you want to import the data.

14. Repeat **Steps 14-15** for each import field, then click **Next**.

15. In the **Review** dialog box, preview the field mappings you specified, and then click **Finish** to initiate the import.

16. In the message box to confirm the number of records to import, click **Yes**.

17. In the message box to confirm the number of records successfully imported, click **OK**.

    If any errors occurred, review the error log to determine the issue.

18. Return to the case spreadsheet to verify the imported case records.

If you have any questions about importing text files, contact CaseMap Support for assistance.

Related Topics

[About importing data]

[Exporting spreadsheet data/reports]

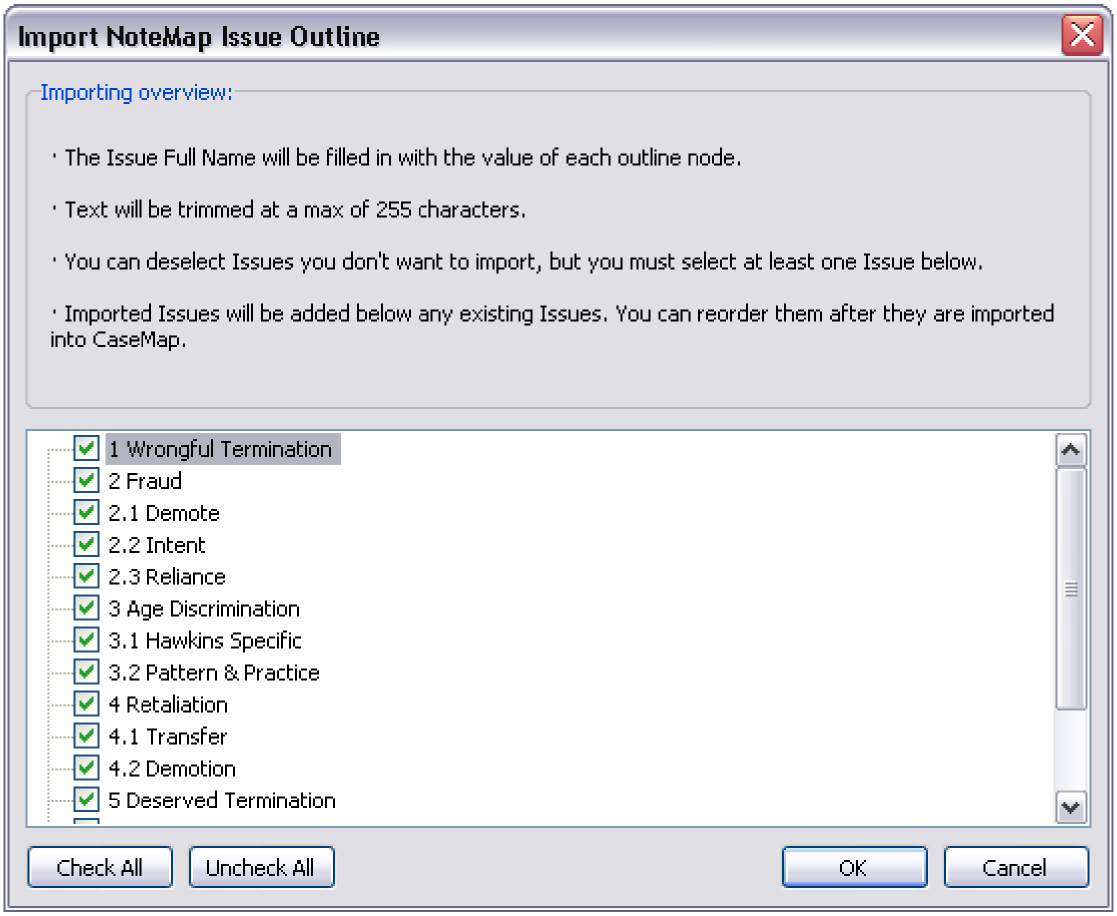
## Importing NoteMap outlines

A companion product of CaseMap, NoteMap® is an outlining tool that offers many features that allow you to produce outlines in ways a traditional word processing program does not. You can send data from any CaseMap spreadsheet directly to a NoteMap outline and import a NoteMap outline into the Issues spreadsheet of CaseMap.

To learn more about NoteMap® and download a free 30-day trial version at www.lexisnexis.com or contact your LexisNexis Sales Representative at 866-316-8525.

### ⊟ To import a NoteMap outline into a case

1. In **NoteMap**, open the outline you want to import.
2. Click on the title note for the outline.
3. Click the **Copy** button on the **Standard** toolbar.
4. In **CaseMap**, click on the **File** menu, and then click **Import**.
5. On the **Import** screen, click **Import Issues from NoteMap**.
6. In the **Import NoteMap Issue Outline** dialog box, review the import overview.



Importing overview:

· The Issue Full Name will be filled in with the value of each outline node.

· Text will be trimmed at a max of 255 characters.

· You can deselect Issues you don't want to import, but you must select at least one Issue below.

· Imported Issues will be added below any existing Issues. You can reorder them after they are imported into CaseMap.

☑ 1 Wrongful Termination
☑ 2 Fraud
☑ 2.1 Demote
☑ 2.2 Intent
☑ 2.3 Reliance
☑ 3 Age Discrimination
☑ 3.1 Hawkins Specific
☑ 3.2 Pattern & Practice
☑ 4 Retaliation
☑ 4.1 Transfer
☑ 4.2 Demotion
☑ 5 Deserved Termination

7. Clear the check box for any issues that you do not want to import.

8. Click **OK** to initiate the import.

   Imported issues are added below any pre-existing issues in the case. You can reorganize the Issues spreadsheet after the data is imported.

9. In the message box indicating the numbers of records being imported, click **Yes**.

10. In the message box indicating a successful import, click **OK**.

    You can now reorganize the issue outline, as needed.

**Related Topics**

About importing data
Sending data to NoteMap

## Send To CaseMap

### *About the Send To CaseMap tool*

You can send facts from many popular office and litigation programs directly to CaseMap. When data is sent to CaseMap from other programs, CaseMap automatically links to the native source file or application record containing the information. You can link to a file regardless of the source type: a document management system, a web site, or a file hosted on a network folder. You can also scan the text to recognize case objects embedded in the text, and either create new objects or match them to objects already existing in the case.

### *Send data to CaseMap in the following ways:*

- Send facts from Concordance® or other document management systems
- Send transcript excerpts from TextMap® or other transcript software
- Send PDFs and facts from documents open in Adobe® Acrobat or Adobe Reader
- Send facts from Microsoft® Outlook® emails
- Send facts and documents from Microsoft® Word®
- Add case law research from Lexis Advance or other web sites

**Process overview**
The process of sending data to CaseMap is very similar in most programs. For example, here is the process for sending a fact to CaseMap from Adobe Acrobat:

1. Open the case you want to send facts to in CaseMap.

2. Open the PDF document in Adobe Acrobat. In Acrobat, you may have to turn on the select tool so you can select text.

3. Select fact text you want to send to CaseMap.

4. Right-click the text selection and click **Send Fact to CaseMap**.

5. CaseMap prompts you to register the document, then allows you to recognize objects. CaseMap's entity recognition for fact entry simplifies and reduces time to add facts to your case. Objects sent to CaseMap from PDFs and Word documents are automatically identified and updated for Persons, Places and Organizations. See About About Object Recognition for Fact Entry for more information.

6. Once you have sent the data to the case, you can immediately view it in the CaseMap spreadsheet selected. You can also review the original source file by double-clicking on the paperclip icon/linked file indicator associated with the case record. New data can be searched as soon as the indexing process completes.

Related Topics

About importing data
Sending Word documents to CaseMap
Send emails to CaseMap
Sending data from Concordance
Sending transcripts to CaseMap
Sending research to CaseMap

Create new facts from annotations
Send to CaseMap product integration
About Objects Recognition for Fact Entry

### *About Object Recognition for Fact Entry*

Object recognition is an optional step in the process of sending a fact to CaseMap. Its purpose is to help you to quickly identify potential instances of Persons, Organizations, and Places in fact text. You can then add them as new objects, or link to objects of these types already in your case. This feature helps you save steps because you accomplish more at the time you first enter fact text.

**How object recognition works**

When you send a fact to CaseMap from PDFs and Word documents, you have the option to scan the selected text to identify potential instances of People, Organizations, and Places. If you run the scan and find a potential match, object recognition highlights the text and identifies the type of object it is most likely to be. The scan will also suggest a link to any matching object already in the People, Organizations, or Places spreadsheets. You can then either accept any suggested match as-is, accept a match but change the object type, or reject the suggested match. If object recognition did not recognize object text, you can manually select text and right-click it to add it. Ensure you add objects that are small sections of text; avoid adding large sections of text (i.e. sentences or paragraphs).

**⊟ To use object recognition when sending a fact to CaseMap**

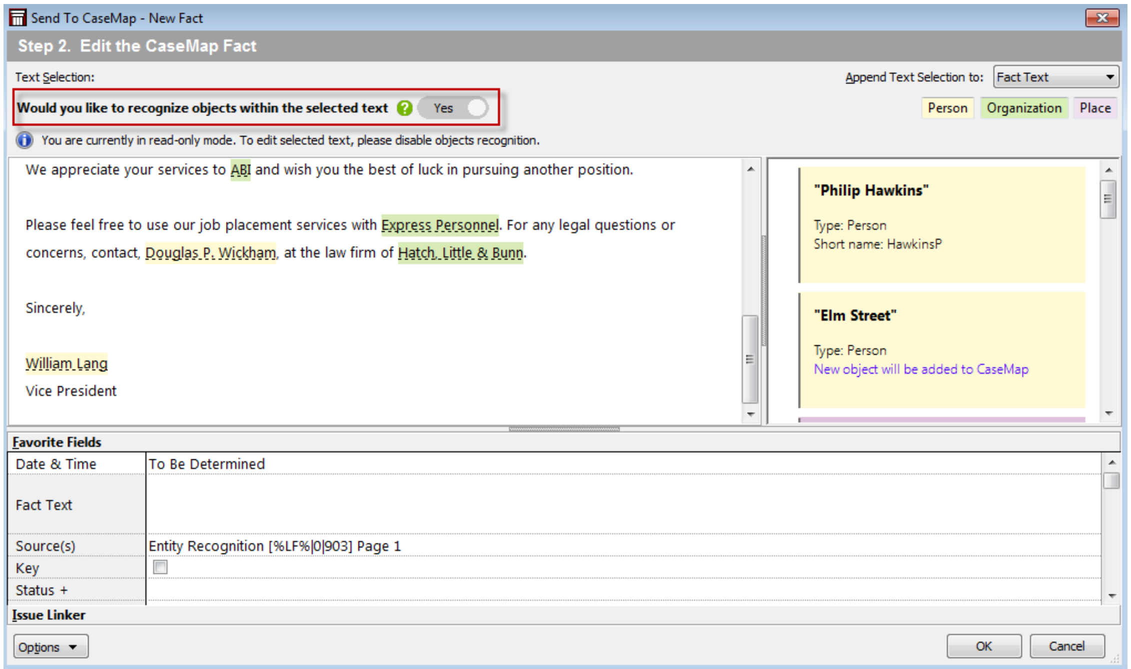
1. Open the case you want to send facts to in CaseMap.

2. Switch to the program you want to send the fact from.

3. Select and then send some text to CaseMap. For example, if you have document in Adobe Acrobat, select the text you want to send to CaseMap, right-click the text selection and then click **Send Fact to CaseMap**.

4. If the document has not already been added to CaseMap, choose a document type, edit the document name and short name as needed, then click **OK**.

   The Edit the CaseMap Fact dialog box opens.


Send To CaseMap - New Fact
Step 2. Edit the CaseMap Fact
Text Selection:
Append Text Selection to: Fact Text
Would you like to recognize objects within the selected text ? Yes
Person
Organization
Place

You are currently in read-only mode. To edit selected text, please disable objects recognition.

We appreciate your services to ABI and wish you the best of luck in pursuing another position.

Please feel free to use our job placement services with Express Personnel. For any legal questions or concerns, contact, Douglas P. Wickham, at the law firm of Hatch, Little & Bunn.

Sincerely,

William Lang
Vice President

"Philip Hawkins"
Type: Person
Short name: HawkinsP

"Elm Street"
Type: Person
New object will be added to CaseMap

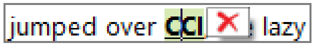
Favorite Fields

| | |
|---|---|
| Date & Time | To Be Determined |
| Fact Text | |
| Source(s) | Entity Recognition [%LF%\|0\|903] Page 1 |
| Key | ☐ |
| Status + | |

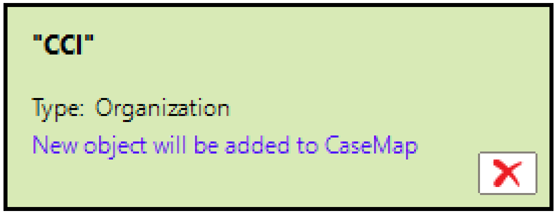
Issue Linker
Options
OK
Cancel

5. To enable object recognition, in the **Would you like to recognize objects within the selected text** section, slide the button to the right.
   - Suggested instances in the selection of Persons, Organizations, and Places are listed on cards in the panel to the right. Each card indicates whether a match was found to an existing object.
   - Suggested matches are also highlighted in the fact selection box.
   - Both cards and text highlighting are color-coded: Persons as yellow, Organizations as green, and Places as pink.
   - CaseMap locks the selection text from editing.
6. Review the highlighted match suggestions and cards:

- To reject a suggested match, either click the highlighted text then click the X.

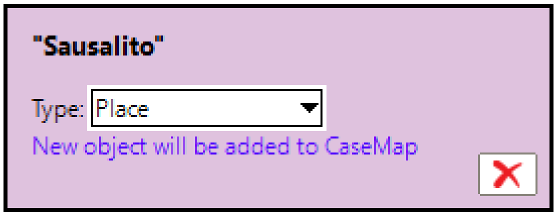

jumped over CCI ✕ lazy

Or click the X on the lower right corner of the card.


"CCI"

Type: Organization
New object will be added to CaseMap

- To change a suggested match from one type to another, click the card for the match, click the **Type** field, and select a new type.

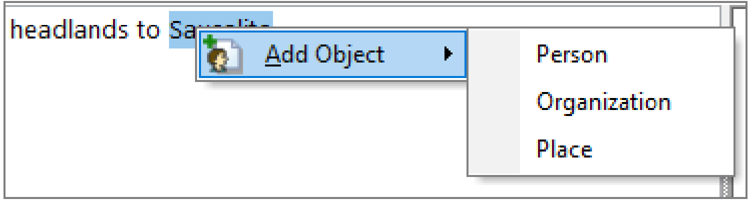


"Sausalito"

Type: Place

New object will be added to CaseMap

- To designate text as a new object, select the text, right-click the selection, and then click **Person**, **Organization**, or **Place**.


headlands to Sa
Add Object
Person
Organization
Place

After adding an object, its card moves to the bottom of the left pane.

7. Fill in other fact details and then click **OK**.

Related Topics

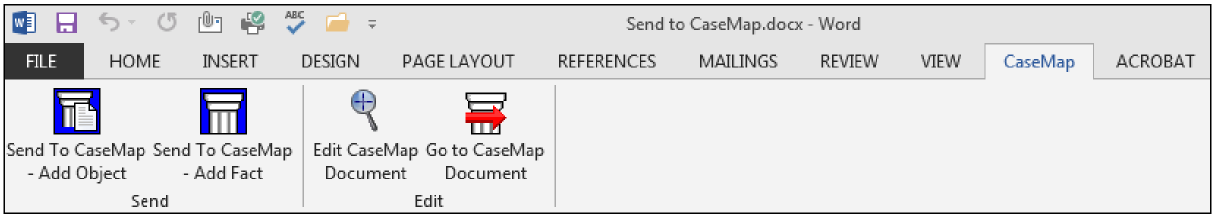
[About the Send to CaseMap tool]
[Sending Word documents to CaseMap]
[Sending facts from PDFs]

### *Sending Word documents to CaseMap*

You can send facts from a document open in Microsoft® Word (2007 and later) (32-bit versions) to CaseMap. This creates entries for the document itself and for the fact you entered. As part of the process of sending the fact, you can identify persons, organizations, and places, named in the fact text, adding them to the Persons, Organizations, and Places spreadsheets respectively. Alternatively, if you only want to send the document to CaseMap without sending a fact, you can do that too. By default, the document is added to the Documents spreadsheet. However. you can add it as a pleading, discovery, demonstrative evidence, or any other object type.

#### Find this feature

- Open Word, and click the **CaseMap** tab. CaseMap commands appear on the ribbon. The Word plug-in is optional during CaseMap installation.


Send to CaseMap.docx - Word
FILE
HOME
INSERT
DESIGN
PAGE LAYOUT
REFERENCES
MAILINGS
REVIEW
VIEW
CaseMap
ACROBAT
Send To CaseMap - Add Object
Send To CaseMap - Add Fact
Send
Edit CaseMap Document
Go to CaseMap Document
Edit

### Tips about sending documents and facts to CaseMap from Word

- We recommend that the Word document is completed and no longer needs editing before you send fact text to CaseMap. This ensures that CaseMap will select the correct text of the document to display in the case record.
- If you try to send a document that has already been sent to CaseMap, you will receive a message box indicating that the document is already linked to a case record. CaseMap recognizes duplicates as long as they are stored in the same folder and have the same file path. If the file is renamed or moved, CaseMap will create a new document record for it.
- Send small, granular text selections as facts. To avoid the chance of obscuring important facts, select and send text that reflects one fact at a time.

If you are working in the Word document and want to quickly locate the document record in the case, click the Go to CaseMap document button. See To view the Word document in CaseMap below.

Once Word documents are sent to the case, you can still edit the document record in CaseMap by clicking the Edit CaseMap Document button on the CaseMap ribbon. See To edit a Word document sent to CaseMap below.

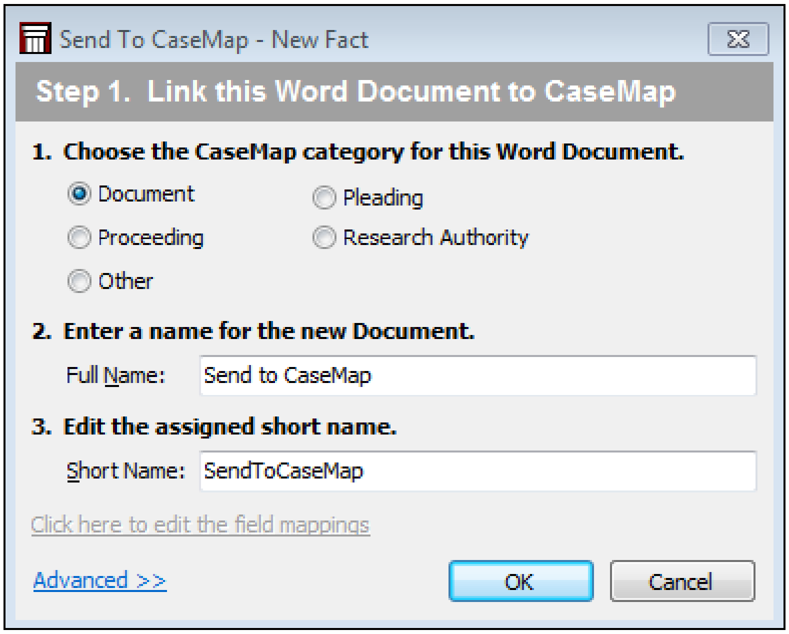
### ⊟ To send a fact from Word to CaseMap

1. Open the CaseMap case that you want to import data into from Word.
2. Open the Word document that contains the text that you want to send to the case.
3. In the Word document, click the **CaseMap** tab.
4. Highlight the information you want to import into a case spreadsheet, then click **Send to CaseMap - Add Fact**.

   You can also right-click and then click Send to CaseMap - Add Fact.

   If you have not saved the document to a file, then a message box displays stating that you need to save the document and try again.

5. In the **Send to CaseMap - New Fact** box, click **Document**.


Send To CaseMap - New Fact
Step 1. Link this Word Document to CaseMap

1. Choose the CaseMap category for this Word Document.

● Document ○ Pleading
○ Proceeding ○ Research Authority
○ Other

2. Enter a name for the new Document.

Full Name: Send to CaseMap

3. Edit the assigned short name.

Short Name: SendToCaseMap

Click here to edit the field mappings
Advanced >>
OK
Cancel

6. In the **Enter a name for the new Document** field, the file name of the document without the extension is entered by default. Edit this value if necessary.

7. In the **Enter the assigned short name** field, a value is added by default, based in part on the file name. Edit this value if necessary.

8. Click **OK**.
   The Edit the CaseMap Fact dialog box opens.

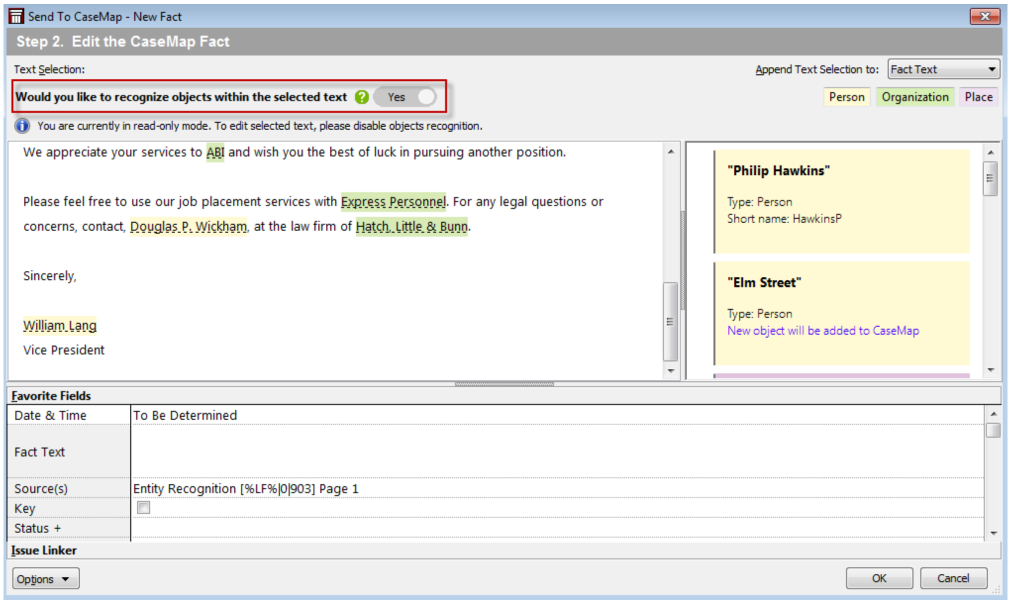
9. In the **Send to CaseMap – New Fact** box, select **Fact Text** in the **Append Text Selection to** field so that the excerpt displays in the Facts spreadsheet.

   Notice that the text you selected from the Word document displays in the Text Selection field and is enclosed in brackets.

⚠ 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.

10. To enable object recognition, in the **Would you like to recognize objects within the selected text** section, slide the button to the right. The steps to use object recognition are described in the next section. To skip object recognition, go to the next numbered step in this procedure. For more information on using object recognition, see: About Object Recognition for Fact Entry.

    **To use object recognition when sending a fact to CaseMap**


Send To CaseMap - New Fact
Step 2. Edit the CaseMap Fact
Text Selection:
Append Text Selection to:
Fact Text
Person
Organization
Place
Yes
Favorite Fields
Issue Linker
Options
OK
Cancel

Would you like to recognize objects within the selected text

You are currently in read-only mode. To edit selected text, please disable objects recognition.

We appreciate your services to ABI and wish you the best of luck in pursuing another position.

Please feel free to use our job placement services with Express Personnel. For any legal questions or concerns, contact, Douglas P. Wickham, at the law firm of Hatch, Little & Bunn.

Sincerely,

William Lang
Vice President

"Philip Hawkins"
Type: Person
Short name: HawkinsP

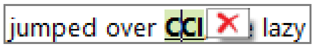
"Elm Street"
Type: Person
New object will be added to CaseMap

| | |
|---|---|
| Date & Time | To Be Determined |
| Fact Text | |
| Source(s) | Entity Recognition [%LF%\|0\|903] Page 1 |
| Key | ☐ |
| Status + | |

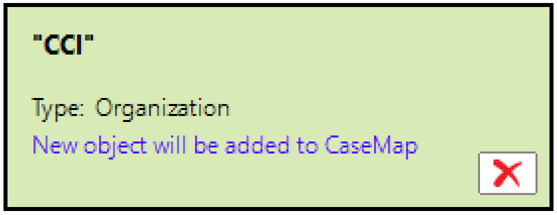
- Suggested instances in the selection of Persons, Organizations, and Places are listed on cards in the panel to the right. Each card indicates whether a match was found to an existing object.
- Suggested matches are also highlighted in the fact selection box.
- Both cards and text highlighting are color-coded: Persons as yellow, Organizations as green, and Places as pink.
- CaseMap locks the selection text from editing.

Review the highlighted match suggestions and cards:

- To reject a suggested match, either click the highlighted text then click the X.

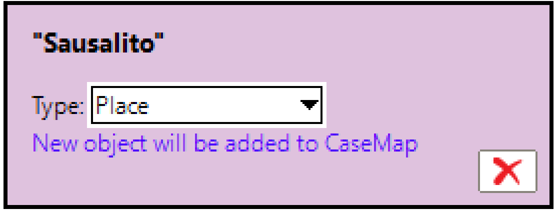
  
  jumped over CCI lazy

  Or click the X on the lower right corner of the card.

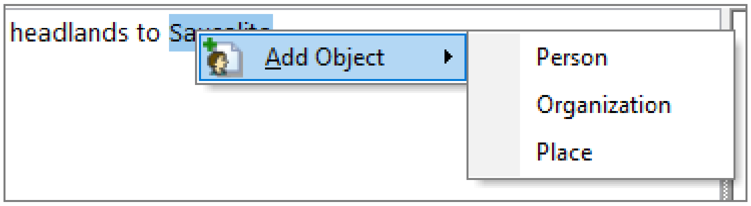
  "CCI"
  Type: Organization
  New object will be added to CaseMap

- To change a suggested match from one type to another, click the card for the match, click the **Type** field, and select a new type.

  "Sausalito"
  Type: Place
  New object will be added to CaseMap

- To designate text as a new object, select the text, right-click the selection, and then click **Person**, **Organization**, or **Place**.



After adding an object, its card moves to the bottom of the left pane.

13. In the **Date & Time** field, type in the date of the fact.In the **Fact Text** field, type in a fact summary/short description of the imported text.

14. This text description displays in the Fact Text field in the Facts spreadsheet and appears as a Fact Card in the Fact Cards view.

15. Select the **Key** check box, if this fact is important to the case.

16. In the **Status** field, select whether the fact is disputed or not.

17. Click the **Issue Linker** bar to link the fact directly to issues, then click **OK** to initiate the import process.

18. In the message prompt, click **Yes** to view the new fact record in the Facts spreadsheet.

19. Click in the **Fact Text** field for this fact record to view the highlighted text you sent from the Word document.

20. Click on the paperclip icon for the fact record to view the linked path to the source file in Word.

21. Scroll to the right and notice that the **Source(s)** field displays the linked element to the Word document and that the **Linked Issue** field displays any issues added for this record.

22. Click **All Objects** in the Case Shortcuts pane to see newly identified objects (Persons, Organizations and Places) added to the Object spreadsheets.

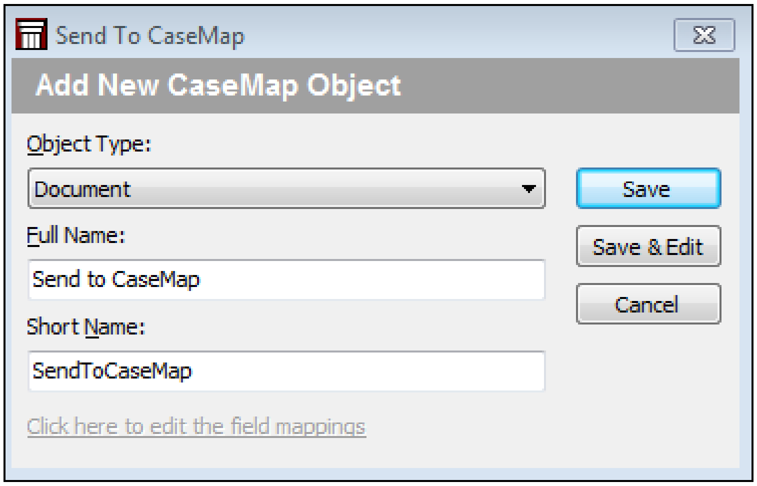
### ⊟ To send a document open in Word to CaseMap

1. Open the **CaseMap** case that you want to import data into from Word.

2. Open the **Word document** that you want to send to the case and click the **CaseMap** tab.

3. In the Word document, click the **Send to CaseMap - Add Object** button to open the Send to CaseMap dialog box.

   You can also right-click on the Word document and click Send to CaseMap - Add Object.



Send To CaseMap

Add New CaseMap Object

Object Type: Document

Full Name: Send to CaseMap

Short Name: SendToCaseMap

> If you have not saved the document to a file, then a message box displays stating that you need to save the document and try again.

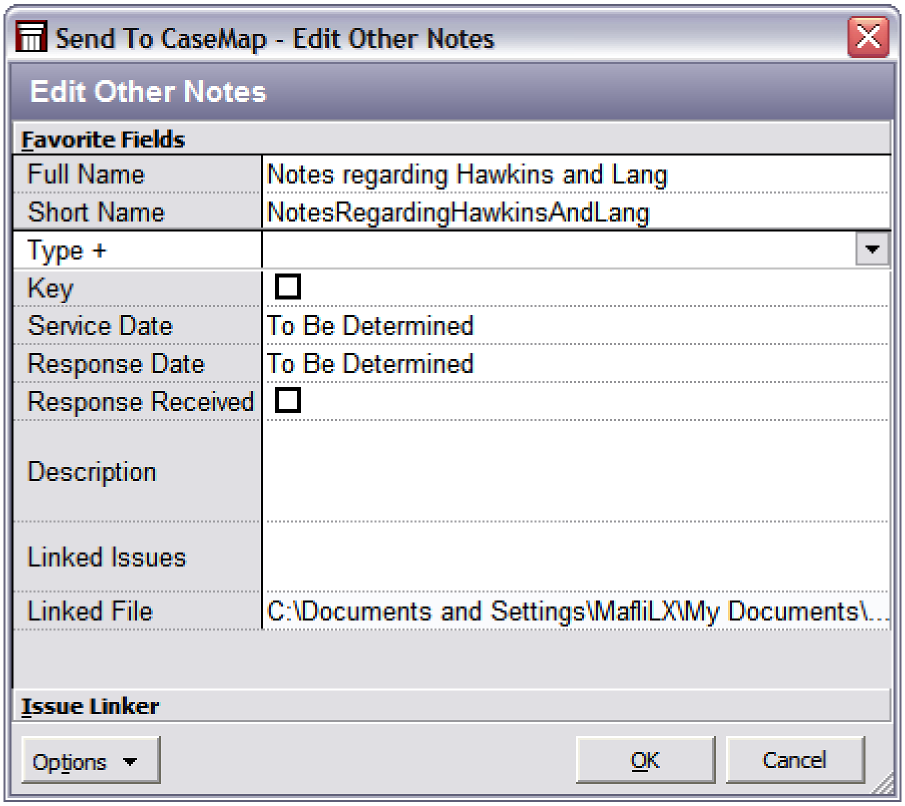
4. In the **Object Type** list, select the object type, for example **Document**.
5. In the **Full Name** and **Short Name** fields, review or edit the default Word document title and short name as needed.
6. Click the **Save** button to continue.
7. In the message box, click **Yes** to view the new document record in CaseMap.

   Notice that the new record now displays in the selected object spreadsheet.
8. Click on the **paperclip** icon for the record to view the linked path to the source file in Word.

   The document is now an object record in the case with a link to the source file saved in a folder.

### ⊟ To edit a Word document sent to CaseMap

1. Open the **Word document** that you have already sent to the case.
2. On the **CaseMap** ribbon, click the **Edit CaseMap Document** button.
3. In the **Send to CaseMap - Edit** dialog box, modify any of the record's Favorite Fields as needed.


Send To CaseMap - Edit Other Notes
Edit Other Notes
Favorite Fields
Issue Linker
Options
OK
Cancel

| | |
|---|---|
| Full Name | Notes regarding Hawkins and Lang |
| Short Name | NotesRegardingHawkinsAndLang |
| Type + | |
| Key | ☐ |
| Service Date | To Be Determined |
| Response Date | To Be Determined |
| Response Received | ☐ |
| Description | |
| Linked Issues | |
| Linked File | C:\Documents and Settings\MafliLX\My Documents\... |

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** that you have already sent to the case.
2. On the **CaseMap** ribbon, click the **Go to CaseMap Document** button.

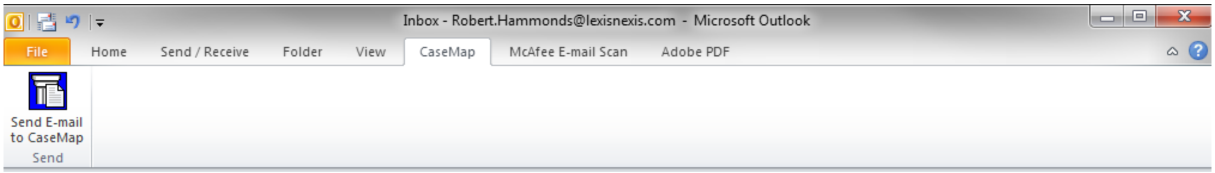
   CaseMap opens the spreadsheet where the record is saved and highlights the applicable record.

Related Topics

About the Send to CaseMap tool
Send emails to CaseMap
About Objects Recognition for Fact Entry

### *Send email to CaseMap*

You can send emails from Microsoft® Outlook (2007 and later) to your CaseMap case.



During the import process, emails are saved as .msg files to a folder you select. CaseMap provides a default list of fields mapped between Outlook and CaseMap spreadsheets. You can edit the default field mappings as needed. See To map email fields. Once you map the fields, CaseMap will remember your settings for the next time you or another case user sends emails to the case.

You can also preview the email before importing to review field data contents, including an attachment count and the name of attachments.

Once emails are imported into CaseMap, you can begin searching the new data as soon as the indexing process completes. When you click the paperclip icon for the new record, the email displays in CaseMap's DocManager.

✎ You can only send emails to CaseMap v10+ cases. If you have a CaseMap v9.0 (or earlier) case open, CaseMap will send a message stating that the previous version case is not supported.

✎ The Send Emails to CaseMap tool is part of the DocManager add-in program. If you have not purchased DocManager, you cannot use this feature. Contact your CaseMap Sales Representative to learn more information about this product.

#### ⊟ To send an Outlook email to CaseMap

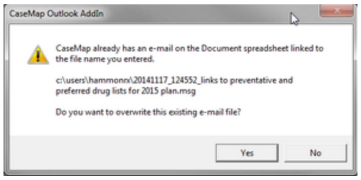
1. Open the CaseMap case that you want to import data into from Outlook.

   💡 You must have the CaseMap case open in order to send an email to it.

2. In **Outlook**, locate the email to be sent to the case and click the 'Send Email to CaseMap' button on the toolbar.

   💡 You can also right-click on the emails and then click 'Send Email to CaseMap'.

   ⊟ If the selected email was previously linked to CaseMap, a Duplicate Records dialog screen displays.



CaseMap already has an e-mail on the Document spreadsheet linked to the file name you entered.

c:\users\hammonrx\20141117_124552_links to preventative and preferred drug lists for 2015 plan.msg

Do you want to overwrite this existing e-mail file?

In the **Send Email to CaseMap Duplicate Records** dialog box, perform one of the following:

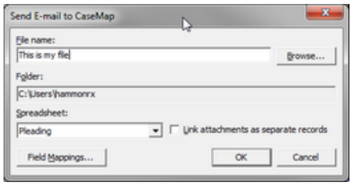
- Click **Yes** to overwrite the record.
- Click **No** and continue.

    1. In the **Change file name** dialog box, click **OK**.

        The Send E-mail to CaseMap dialog box opens.

    2. In the **File Name** box, change the file name and other pertinent information, and click **OK** to continue.

⊟ If selected email was not previously linked to CaseMap, the Send Email to CaseMap dialog box opens.



File name: This is my file

Folder: C:\Users\hammonrx

Spreadsheet: Pleading

☐ Link attachments as separate records

a. Perform the following:

- In the file name box, confirm the file name.
- Click the Browse button, and in the 'Save Email as' dialog box, locate the folder to save the email, and then click Save.
- In the Folder box, confirm the folder location.

Emails are saved as .msg files, using the email subject as the file name.

> All attachments will be stored in the Documents spreadsheet in CaseMap by default.

b. ⊟ Optional: Link attachments as separate records

If you remove the check mark in the **Link attachments as separate records** check box the Spreadsheet box is enabled.

1) Use the drop-down to select a spreadsheet from the list.

2) Proceed to **Step c**.

   c. Optional: Click the **Field Mappings** button to create/adjust field mappings.

      See To map email fields for more information.

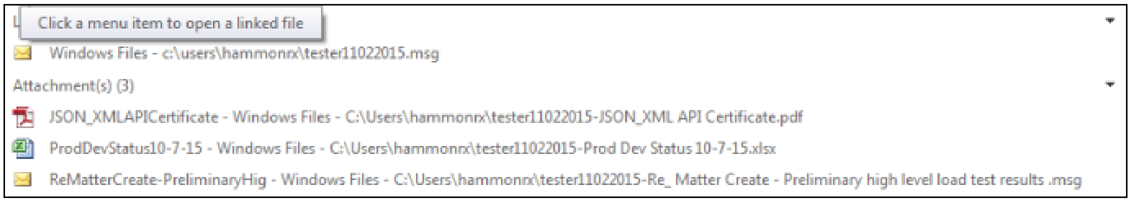
3. Click **OK** to initiate the import process.

   The email now displays in the Document spreadsheet with a link to the email in Outlook.

4. In **CaseMap**, go to the top of the Documents spreadsheet to see the new record created for the email.

> The storage location (Documents spreadsheet) in CaseMap will be different if you chose a different spreadsheet above.

5. Click the **paperclip** icon for the record to display the linked file(s) information.



Click a menu item to open a linked file

Windows Files - c:\users\hammonrx\tester11022015.msg

Attachment(s) (3)

JSON_XMLAPICertificate - Windows Files - C:\Users\hammonrx\tester11022015-JSON_XML API Certificate.pdf

ProdDevStatus10-7-15 - Windows Files - C:\Users\hammonrx\tester11022015-Prod Dev Status 10-7-15.xlsx

ReMatterCreate-PreliminaryHig - Windows Files - C:\Users\hammonrx\tester11022015-Re_ Matter Create - Preliminary high level load test results .msg

   Optional: Double-click on the paperclip to display the linked file in DocManager.

   For more information, see About DocManager.

6. Optional: In **Outlook**, continue sending emails to CaseMap.

7. When you are finished, click the **Cancel** button in the **Send Email to CaseMap** dialog box.

### To bulk send Outlook emails to CaseMap

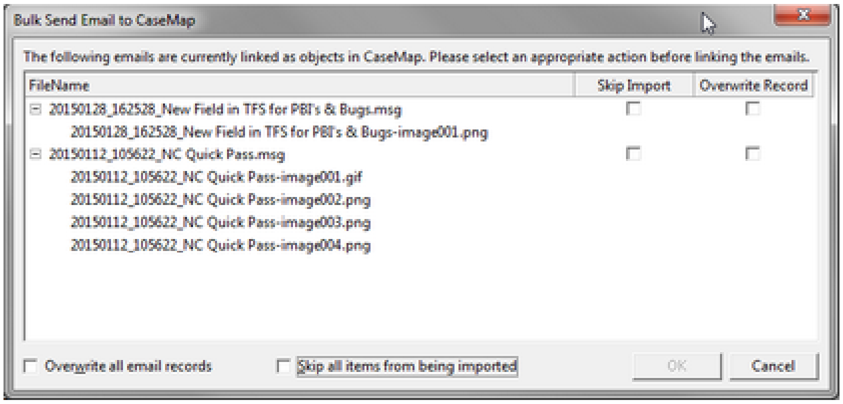
1. Open the CaseMap case that you want to import data into from Outlook.

> You must have the CaseMap case open in order to send an email to it.

2. In **Outlook**, locate the emails to be sent to the case and click the 'Send Email to CaseMap' button on the toolbar.

> You can also right-click on the emails and then click 'Send Email to CaseMap'.

   ⊟ If selected email(s) were previously linked to CaseMap, a Duplicate Records dialog screen displays.


Bulk Send Email to CaseMap
☐ Overwrite all email records
☐ Skip all items from being imported
OK
Cancel

The following emails are currently linked as objects in CaseMap. Please select an appropriate action before linking the emails.

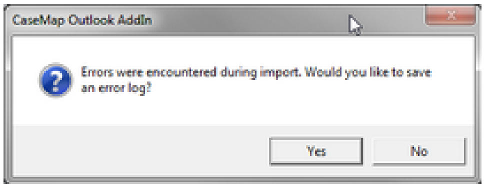
| FileName | Skip Import | Overwrite Record |
|---|---|---|
| ⊟ 20150128_162528_New Field in TFS for PBI's & Bugs.msg | ☐ | ☐ |
| 20150128_162528_New Field in TFS for PBI's & Bugs-image001.png | | |
| ⊟ 20150112_105622_NC Quick Pass.msg | ☐ | ☐ |
| 20150112_105622_NC Quick Pass-image001.gif | | |
| 20150112_105622_NC Quick Pass-image002.png | | |
| 20150112_105622_NC Quick Pass-image003.png | | |
| 20150112_105622_NC Quick Pass-image004.png | | |

a. In the **Bulk Send Email to CaseMap Duplicate Records** dialog box, place a check mark beside the action (**Skip Import** or **Overwrite Record**) for each record listed.

b. Optional: Select the **Overwrite all email records** or the **Skip all items from being imported** check box to perform that action for all listed items.

c. Click **OK** to continue.

⊟ Conditional: Errors were encountered during import


CaseMap Outlook AddIn
Yes
No

Errors were encountered during import. Would you like to save an error log?

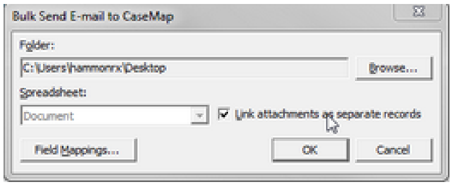
1. Click **Yes** to save to error log.

2. In the **Save As** dialog box, choose a file storage location and click **Save**.

The Import Confirmation screen displays summarizing the number of records imported and/or skipped.

d. Click **OK** to continue.

⊟ If selected emails were not previously linked to CaseMap, the Bulk Send Email to CaseMap dialog box opens.


Bulk Send E-mail to CaseMap
Browse...
Field Mappings...
OK
Cancel

Folder: C:\Users\hammonrx\Desktop

Spreadsheet: Document

☑ Link attachments as separate records

a. Perform the following:

- In the Folder field, confirm the folder location.

- Click the Browse button, and in the **Save Email as** dialog box, locate the folder to save the email, and then click **Save**.

Emails are saved as .msg files, using the email subject as the filename.

> All attachments will be stored in the Documents spreadsheet in CaseMap by default.

b. ⊟ Optional: Link attachments as separate records

If you remove the check mark in the **Link attachments as separate records** check box the Spreadsheet box is enabled.

1) Use the drop-down to select a spreadsheet from the list.

2) Proceed to **Step c**.

c. Optional: Click the **Field Mappings** button to create/adjust field mappings.

See [To map email fields](#) for more information.

d. Click **OK** to initiate the process.

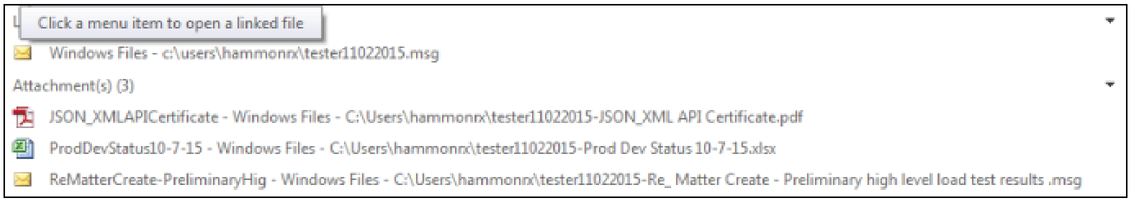
The Import Confirmation box displays displays.

3. Click **OK** to continue.

4. In **CaseMap**, go to the top of the Documents spreadsheet to see the new record created for the email.

> The storage location (Documents spreadsheet) in CaseMap will be different if you chose a different spreadsheet above.

5. Click the **paperclip** icon for this record to view the path and file attachments.


Click a menu item to open a linked file
Windows Files - c:\users\hammonrx\tester11022015.msg
Attachment(s) (3)
JSON_XMLAPICertificate - Windows Files - C:\Users\hammonrx\tester11022015-JSON_XML API Certificate.pdf
ProdDevStatus10-7-15 - Windows Files - C:\Users\hammonrx\tester11022015-Prod Dev Status 10-7-15.xlsx
ReMatterCreate-PreliminaryHig - Windows Files - C:\Users\hammonrx\tester11022015-Re_ Matter Create - Preliminary high level load test results .msg

> Double-click the paperclip to open the file in CaseMap DocManager.

6. Optional: In **Outlook**, continue sending emails to CaseMap.

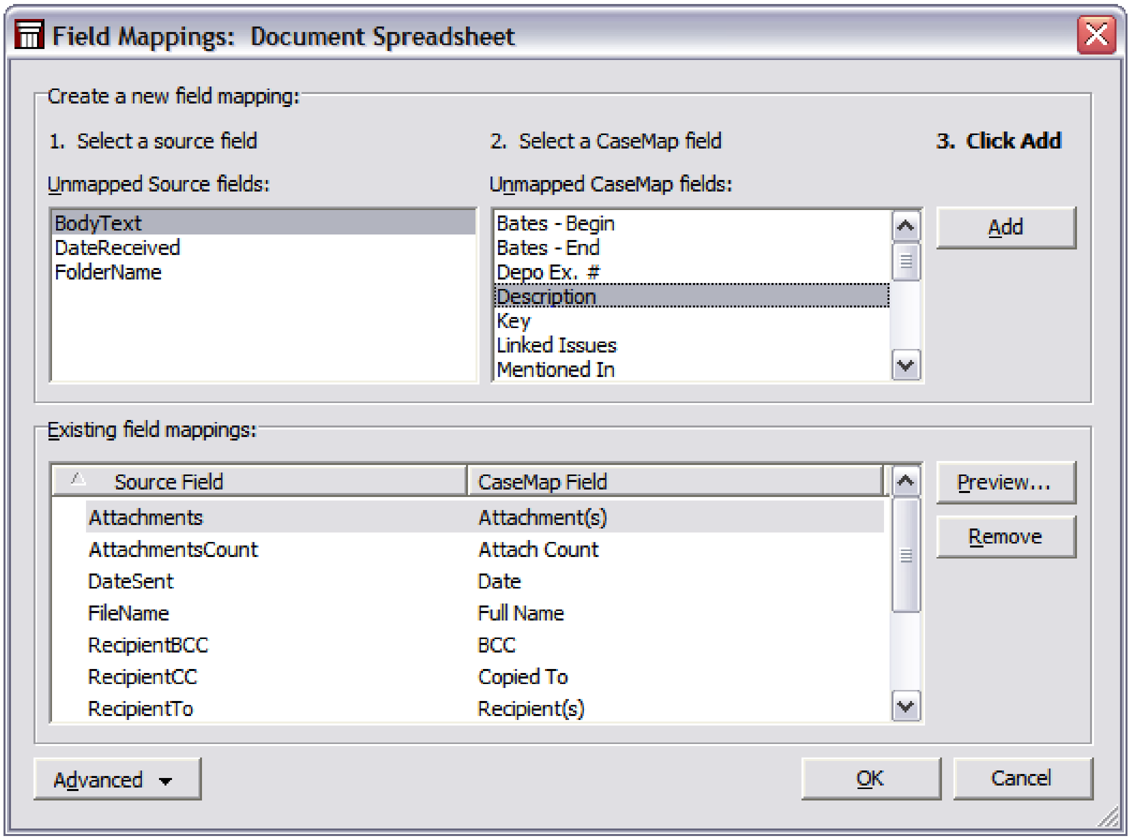
7. When you are finished, click the **Cancel** button in the **Send Email to CaseMap** dialog box.

### ⊟ To map email fields

1. In **Outlook** , click the **Send Email to CaseMap** button to open the **Send Email to CaseMap** dialog box.

2. Click the **Field Mappings** button to display the **Field Mappings** dialog box.

   CaseMap provides a list of existing fields that are already mapped for you in the Existing field mappings box. You can modify the default list by clicking on the Remove button and re-mapping fields.


Field Mappings: Document Spreadsheet
Create a new field mapping:
1. Select a source field
2. Select a CaseMap field
3. Click Add
Unmapped Source fields:
Unmapped CaseMap fields:
Add
Existing field mappings:
Preview...
Remove
Advanced
OK
Cancel

Unmapped Source fields:

- BodyText
- DateReceived
- FolderName

Unmapped CaseMap fields:

- Bates - Begin
- Bates - End
- Depo Ex. #
- Description
- Key
- Linked Issues
- Mentioned In

Existing field mappings:

| Source Field | CaseMap Field |
|---|---|
| Attachments | Attachment(s) |
| AttachmentsCount | Attach Count |
| DateSent | Date |
| FileName | Full Name |
| RecipientBCC | BCC |
| RecipientCC | Copied To |
| RecipientTo | Recipient(s) |

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** button to undo any existing field mappings.

   The fields will display in their respective boxes and will remain unmapped until you map them again.

### ⊟ To use advanced field mapping settings

Advanced field mapping settings allow you to add a source data field to field mappings list, and apply formatting to mapped fields (static text and hard returns). Once you send an email to CaseMap, the field mappings are share with other case users.

1. Click the **Advanced** button and then click **Advanced Mappings**.
2. In the **Document Spreadsheet fields** area, click your field mapping preference: **All fields**, **Mapped fields**, or **Unmapped fields**.

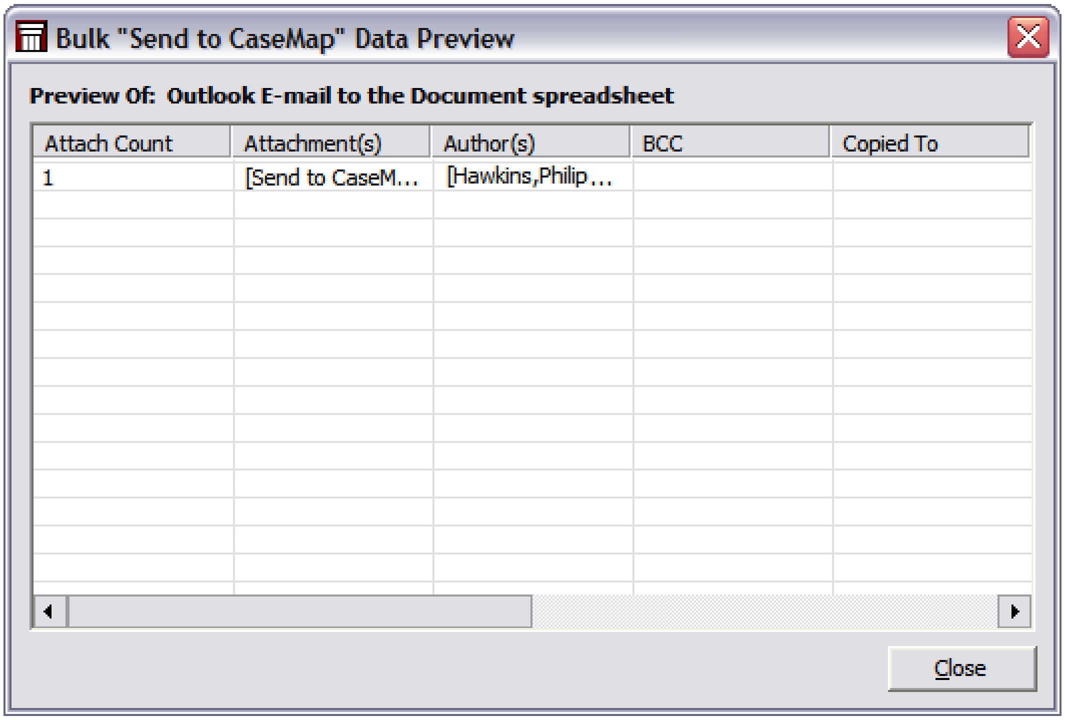
   This area defaults to displaying all mapped fields.
3. Select the field mapping structure you want to modify.
4. In the **Selected CaseMap Field** area, click the **Add**, **Modify**, or **Remove** buttons to review source field mapping types, apply formatting to fields, and to add/modify/ delete a source data field.
5. In the **Display Options** area, select check boxes to omit prior or next fields if the field value is blank.
6. Select the **Link Object short names** check box to automatically link short names for the selected field.

   This option only works in Description fields.
7. Select the **Always update** field to enable this option for the selected field.
8. Click **OK** to save your changes.
9. In the Field Mappings dialog box, click **OK** when you are finished.
10. In the **Send Email to CaseMap** dialog box, click **Cancel** to exit the tool.

> To reset field mappings to the default structure, click the Advanced button and click Reset to Default Mappings.

### To preview emails prior to sending

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.



Bulk "Send to CaseMap" Data Preview

**Preview Of: Outlook E-mail to the Document spreadsheet**

| Attach Count | Attachment(s) | Author(s) | BCC | Copied To |
|---|---|---|---|---|
| 1 | [Send to CaseM... | [Hawkins,Philip... | | |

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.

### To save a list of field mappings

1. In **Outlook**, click the **Send Email to CaseMap** button.
1. In the **Send Email to CaseMap** dialog box, click the **Field Mappings** button.
2. In the **Field Mappings** dialog box, click the **Advanced** button and then click **Save Mappings to File**.
3. In the **Save As** dialog box, navigate to the folder where you want to save the field mapping file.

Field mappings are saved as a .cmbulkmap file.

4. In the **File name** field, type a name for the field mappings.
5. Click **Save**.
6. In the **Field Mappings** dialog box, click **Close**.
7. In the **Send Email to CaseMap** dialog box, click **OK** to exit the utility.

Related Topics

About the Send to CaseMap tool
About DocManager

### *Sending facts from PDFs*

You can send facts from a document open in Adobe® Acrobat or Adobe Reader to CaseMap. This creates entries for the document itself and for the fact you entered. As part of the process of sending the fact, you can identify persons, organizations, and places, named in the fact text, adding them to the Persons, Organizations, and Places spreadsheets respectively. Alternatively, if you only want to send the document to CaseMap without sending a fact, you can do that too. By default, the document is added to the Documents spreadsheet. However. you can add it as a pleading, discovery, demonstrative evidence, or any other object type.

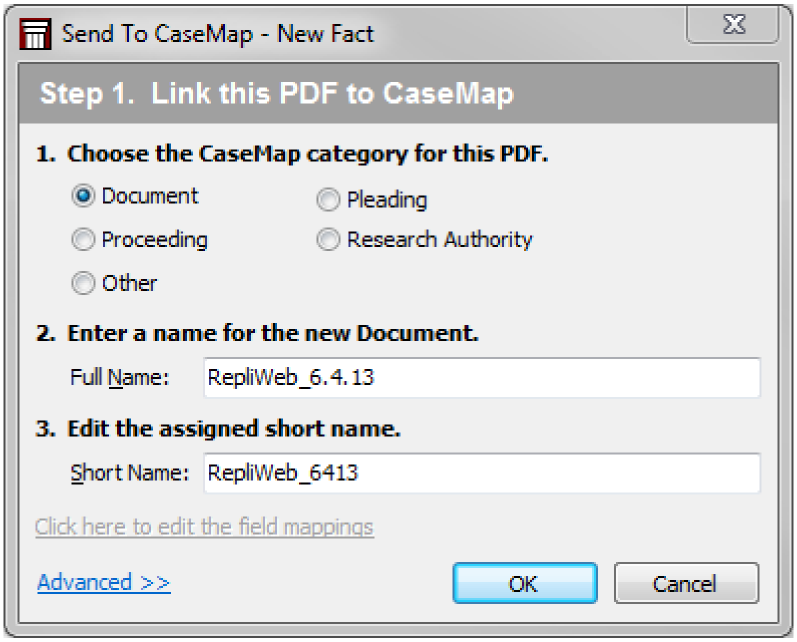
**Find this feature**

- Open Adobe Acrobat or Adobe Reader. Enable text selection. Either right-click some selected text to send a fact or right click anywhere in the document to send the document. Then select either **Send Fact to CaseMap** or **Send PDF to CaseMap**.

#### ⊟ To send facts from a PDF file

1. Open the **Adobe Acrobat** file you are reviewing.
2. In **Acrobat**, click on the **Select Tool** button and highlight the text you want to import.
3. Right-click on the highlighted text and click **Send Fact to CaseMap**.

   You can also click the Send Fact to CaseMap button under CaseMap DocPreviewer.
4. In the **Send to CaseMap - New Fact** box, select **Document**.


Send To CaseMap - New Fact

Step 1. Link this PDF to CaseMap

1. Choose the CaseMap category for this PDF.

● Document ○ Pleading
○ Proceeding ○ Research Authority
○ Other

2. Enter a name for the new Document.

Full Name: RepliWeb_6.4.13

3. Edit the assigned short name.

Short Name: RepliWeb_6413

If CaseMap does not recognize the document as on object in the case, a Link this PDF to CaseMap dialog box displays instead for you to add this record to the Documents object spreadsheet. Once you complete this step, you see the Create New Fact dialog box.

5. In the **Enter a name for the new Document** field, type in the full name of the document.

6. In the **Enter the assigned short name** field, type in a short name for the document, then click **OK**.

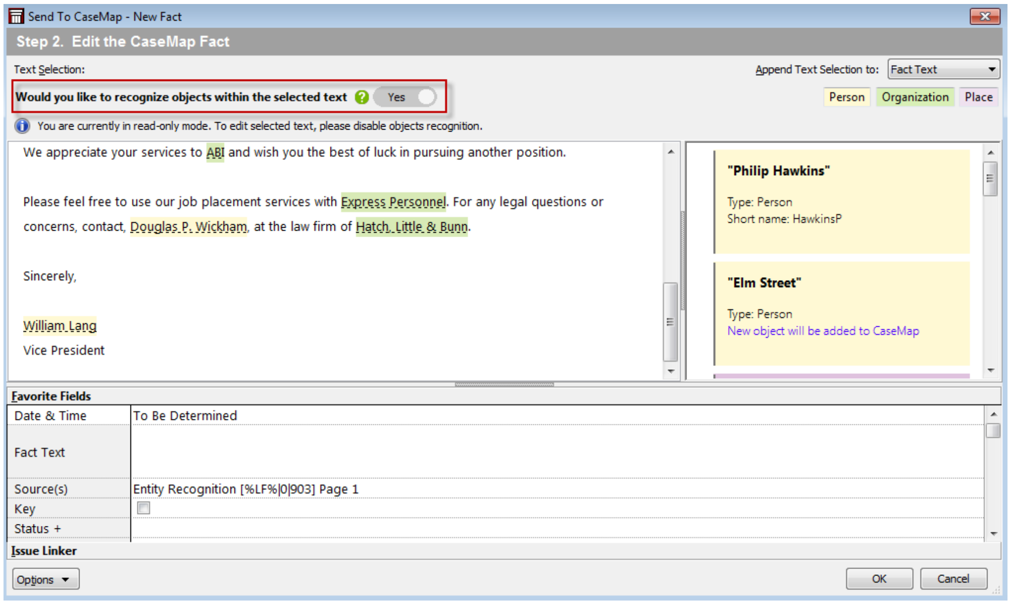
7. In the **Send to CaseMap – New Fact** box, select **Fact Text** in the **Append Text Selection to** field so that the excerpt displays in the Facts spreadsheet.

   Notice that the text you selected from the PDF file displays in the Text Selection field and is enclosed in brackets.

⚠ 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.

10. To enable object recognition, in the **Would you like to recognize objects within the selected text** section, slide the button to the right. The steps to use object recognition are described in the next section. To skip object recognition, go to the next numbered step in this procedure. For more information on using object recognition, see: About Object Recognition for Fact Entry.

    **To use object recognition when sending a fact to CaseMap**


Send To CaseMap - New Fact
Step 2. Edit the CaseMap Fact
Text Selection:
Append Text Selection to:
Fact Text
Person
Organization
Place
Yes
Favorite Fields
Issue Linker
Options
OK
Cancel

Would you like to recognize objects within the selected text

You are currently in read-only mode. To edit selected text, please disable objects recognition.

We appreciate your services to ABI and wish you the best of luck in pursuing another position.

Please feel free to use our job placement services with Express Personnel. For any legal questions or concerns, contact, Douglas P. Wickham, at the law firm of Hatch, Little & Bunn.

Sincerely,

William Lang
Vice President

"Philip Hawkins"
Type: Person
Short name: HawkinsP

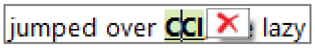
"Elm Street"
Type: Person
New object will be added to CaseMap

| | |
|---|---|
| Date & Time | To Be Determined |
| Fact Text | |
| Source(s) | Entity Recognition [%LF%\|0\|903] Page 1 |
| Key | ☐ |
| Status + | |

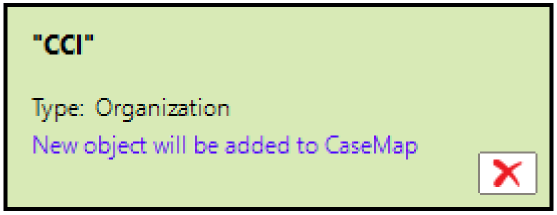
- Suggested instances in the selection of Persons, Organizations, and Places are listed on cards in the panel to the right. Each card indicates whether a match was found to an existing object.
- Suggested matches are also highlighted in the fact selection box.
- Both cards and text highlighting are color-coded: Persons as yellow, Organizations as green, and Places as pink.
- CaseMap locks the selection text from editing.

Review the highlighted match suggestions and cards:

- To reject a suggested match, either click the highlighted text then click the X.

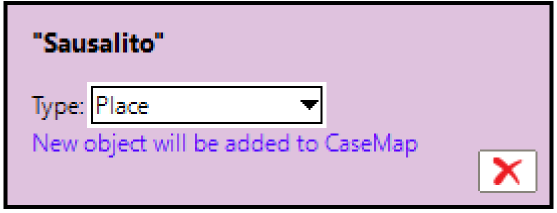
  
  jumped over CCI lazy

  Or click the X on the lower right corner of the card.

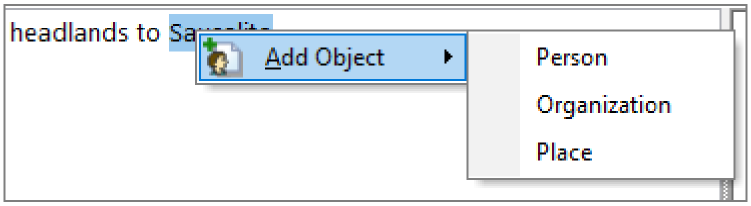
  "CCI"
  Type: Organization
  New object will be added to CaseMap

- To change a suggested match from one type to another, click the card for the match, click the **Type** field, and select a new type.

  "Sausalito"
  Type: Place
  New object will be added to CaseMap

- To designate text as a new object, select the text, right-click the selection, and then click **Person**, **Organization**, or **Place**.



After adding an object, its card moves to the bottom of the left pane.

11. In the **Date & Time** field, type in the date of the fact.
12. In the **Fact Text** field, type in a fact summary/short description of the imported text.
13. This text description will display in the Fact Text field in the Facts spreadsheet and appears as a Fact Card in the Fact Cards view.
14. Select the **Key** check box, if this fact record is important to the case.
15. In the **Status** field, select whether the fact is disputed or not.
16. Click the **Issue Linker** bar to link the fact directly to issues, then click **OK** to initiate the import process.
17. In the message prompt, click **Yes** to view the new fact record in the Facts spreadsheet.
18. Click in the **Fact Text** field for this fact record to view the highlighted text you sent from the Word document.
19. Click on the paperclip icon for the fact record to view the linked path to the source file in Word.
20. Scroll to the right and notice that the **Source(s)** field displays the linked element to the Word document and that the **Linked Issue** field displays any issues added for this record.
21. Click **All Objects** in the Case Shortcuts pane to see newly identified objects (Persons, Organizations and Places) added to the Object spreadsheets.

### ⊟ To update facts from a PDF file

If you need to update a fact record in CaseMap with new or additional text from the PDF source file, simply select the highlighted text and resending it to the case.

1. In the **Facts** spreadsheet, click on the fact record you want to update.
2. In the **Acrobat** source file, highlight the text you want to add to the **Fact Text** field for this record.
3. Click the **CaseMap DocPreviewer** button and then click **Advanced** > **Send Fact to CaseMap - Update**.
4. In the **Send to CaseMap - Edit Fact** box, review the updated text in the **Text Selection** field and make any other field updates.

5. When you are finished, click **OK** to save the updates in the fact record.

6. Return the fact record in the **Facts** spreadsheet to verify that the updated text was added after any existing text in the **Fact Text** field.

   You may want to review and edit the Fact Text field if there is duplicate information.

> 📝 You must select the fact record you want to update before sending the new text to CaseMap. Otherwise, the Send to CaseMap wizard opens the Add New CaseMap Object box if the document is not recognized as part of the case. CaseMap then creates a new fact record for the imported text with a link back to the document.

Related Topics

About importing data
About PDFs and DocPreviewer
About Objects Recognition for Fact Entry

### *Sending research to CaseMap*

When researching information on case web sites like Lexis Advance, you can import information into one of the Research spreadsheets in the case so you can organize extracts and authorities that affect your case strategy. However, attachments linked from www.lexis.com using the Send to CaseMap tool may be compromised when web site data is updated or refreshed. We strongly recommend that any authorities included in your case are first saved as Adobe® Acrobat PDF files. You can store these files in network folders and attach the source file to the research record in the Research Authorities spreadsheet. You can then highlight extracts in the PDF file and send the data to the Research Extracts and Authorities spreadsheet. For more information, see the Importing PDFs help topic.

> ⚠ Attachments linked from www.lexis.com using the Send to CaseMap tool may be compromised when web site data is updated or refreshed. We strongly recommend that any authorities included in your case are first saved as Adobe® Acrobat PDF files. You can store these files in network folders and attach the source file to the research record in the Research Authorities spreadsheet. You can then highlight extracts in the PDF file and send the data to the Research Extracts and Authorities spreadsheet. For more information, see the Importing PDFs help topic.

> 📝 You can manually enter data in Research spreadsheets and then attach source files stored in network folders directly to the corresponding spreadsheet record.

Related Topics

[About the Send to CaseMap tool]
[Sending data from Concordance]
[Sending transcripts to CaseMap]

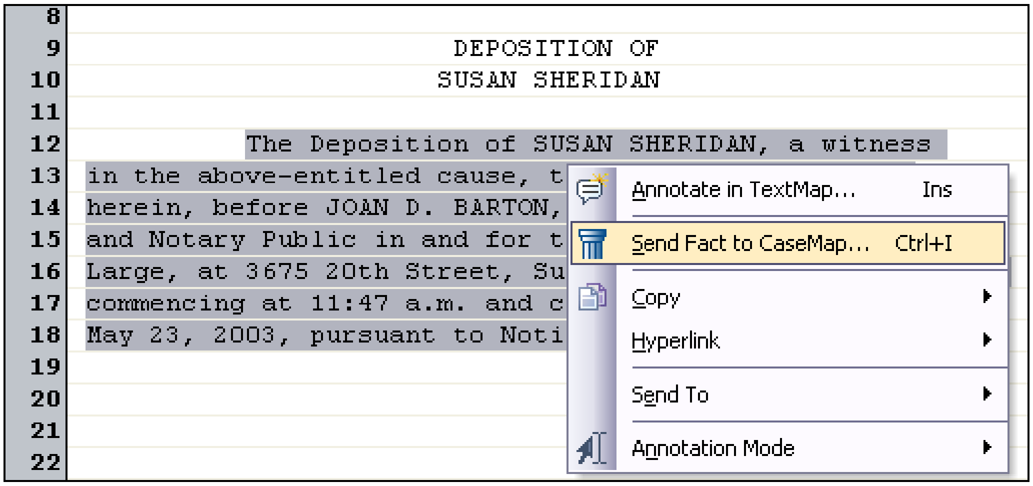
### *Sending transcripts to CaseMap*

Transcripts are often reviewed in transcription software, like TextMap®. During review, key quotes are discovered that you'll want to track in the Facts spreadsheet. By using CaseMap's Send To utility, you can quickly import this data and categorize it in your case and automatically attach the Fact record to the transcript file stored in TextMap.

> When you import content into the Facts spreadsheet, we recommend that quotes, confidential, or lengthy information is directly imported into the Source Quote field to keep this information from printing on reports. Use the Fact Text field to summarize the quote for tracking purposes. It's also best to insert the Source Quote field into the Facts spreadsheet before users are added to the case. This ensures that all users can view this field without having to manually insert it into their spreadsheet view.

#### ⊟ To send transcript text to a case

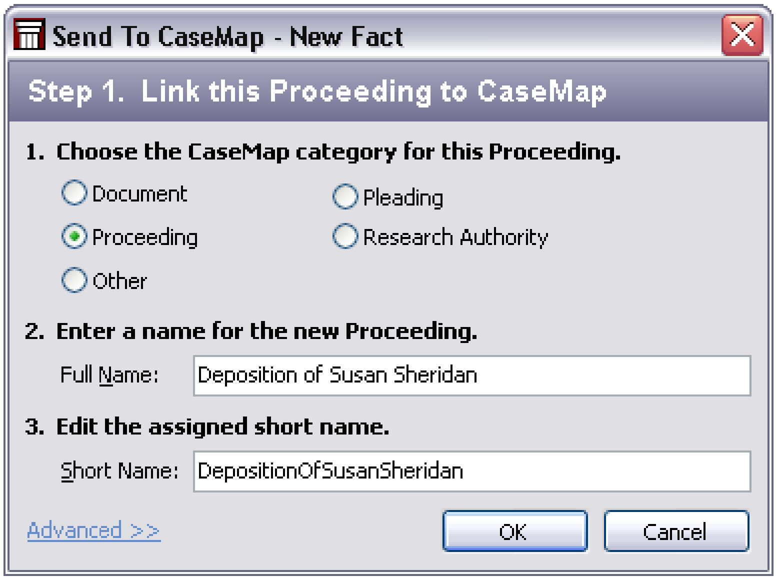
1. Open **TextMap** and then open the transcript that contains information you want to send to CaseMap.
2. In the transcript, highlight the text you want to import, then right-click and click **Send Fact to CaseMap**.



DEPOSITION OF
SUSAN SHERIDAN

The Deposition of SUSAN SHERIDAN, a witness
in the above-entitled cause, t
herein, before JOAN D. BARTON,
and Notary Public in and for t
Large, at 3675 20th Street, Su
commencing at 11:47 a.m. and c
May 23, 2003, pursuant to Noti

3. When the Send to CaseMap utility launches, select **Proceeding** for the spreadsheet in which you want to import a quote excerpt.



Send To CaseMap - New Fact

Step 1. Link this Proceeding to CaseMap

1. Choose the CaseMap category for this Proceeding.

○ Document ○ Pleading
● Proceeding ○ Research Authority
○ Other

2. Enter a name for the new Proceeding.

Full Name: Deposition of Susan Sheridan

3. Edit the assigned short name.

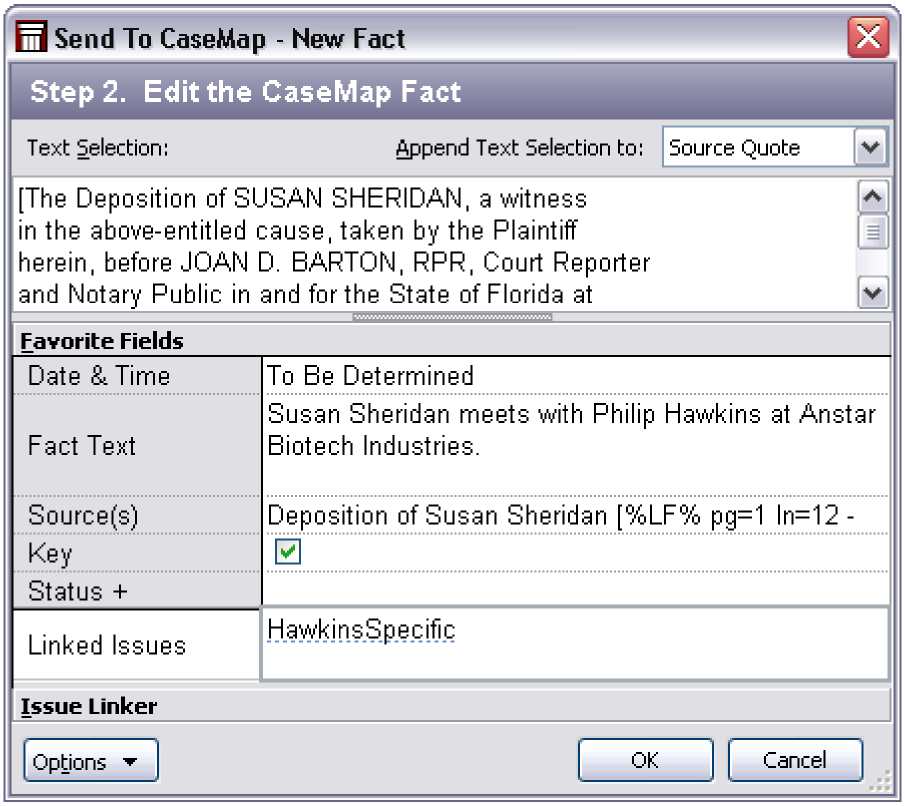
Short Name: DepositionOfSusanSheridan

Depending on the settings you select in TextMap, you may receive an Annotation box prior to the Send To CaseMap – New Fact box.

4. In the **Edit the assigned short name** field, you can accept the default entry or modify it according to your internal guidelines, then click **OK**.

5. In the message, click **Yes** to link the transcript to the existing proceeding in the case.

6. In the **Send to CaseMap – New Fact** box, select **Source Quote** in the **Append Text Selection to** field so that the excerpt displays in the Facts spreadsheet.



Text Selection: Append Text Selection to: Source Quote

[The Deposition of SUSAN SHERIDAN, a witness
in the above-entitled cause, taken by the Plaintiff
herein, before JOAN D. BARTON, RPR, Court Reporter
and Notary Public in and for the State of Florida at

Favorite Fields

| | |
|---|---|
| Date & Time | To Be Determined |
| Fact Text | Susan Sheridan meets with Philip Hawkins at Anstar Biotech Industries. |
| Source(s) | Deposition of Susan Sheridan [%LF% pg=1 ln=12 - |
| Key | ☑ |
| Status + | |
| Linked Issues | HawkinsSpecific |

Issue Linker

Notice that the excerpt you selected from the transcript displays in the Text Selection field and is enclosed in brackets.

7. In the **Date & Time** field, type in the date of the deposition.
8. In the **Fact Text** field, type in a fact summary of the imported text.
9. Select the **Key** check box, if this fact is important to the case.
10. Click on the **Issue Linker** bar to link the fact directly to issues, then click **OK**.

    You may also type in issue short names in the Linked Issues field.
11. When you are finished, click **OK** to initiate the import process.
12. In the message, click **Yes** to view the transcript excerpt in the **Facts** spreadsheet.
13. Click in the **Source Quote** field for this fact record to view the highlighted excerpt you sent from the transcript file.

    Notice that the fact text you entered now displays in the Fact Text field.
14. Click on the **Paperclip** icon for the transcript record to view the linked path to the source file in TextMap.
15. Scroll to the right and notice that the **Source(s)** field displays the linked element to the deposition and that the **Linked Issue** field displays issues previously added for this transcript.

Related Topics

[About the Send to CaseMap tool]
[Sending data from Concordance]
[Sending research to CaseMap]

### *Sending data from Concordance*

You can send selected text or documents opened in Concordance to a spreadsheet in your CaseMap case. When you send a text excerpt to the Facts spreadsheet, a new fact record is created for you. During the import process, a new document record is also created on the Documents spreadsheet. The fact and document records provide a link to the source document in Concordance.

You can also bulk import multiple records located in a Concordance search or tagged in a document set into a CaseMap spreadsheet to include in your case records listing. Both processes automatically set links back to the original source record in Concordance. To view the source record, click on the paperclip icon for the associated case record.

**_Sending data from Concordance includes:_**

- Sending individual facts per record into a case spreadsheet (Documents or Pleadings)
- Bulk importing multiple records by field mapping data to the case spreadsheet (Documents)

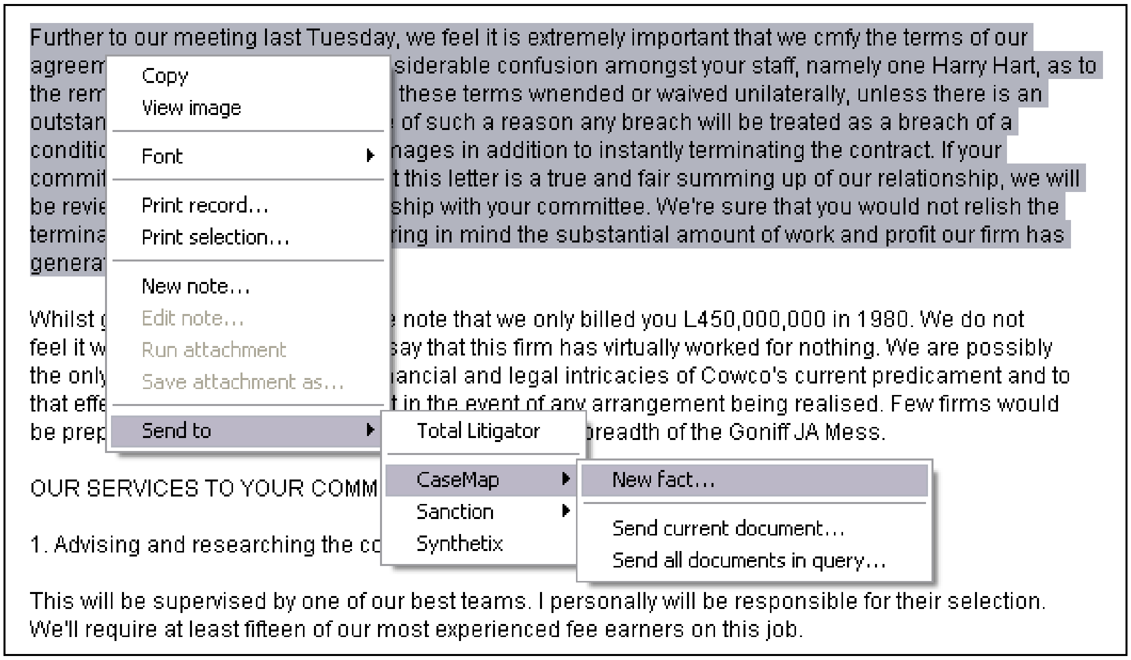
#### ⊟ To send fact information from Concordance

1. Open the **CaseMap** case that you want to import data into from Concordance.

   CaseMap does not need to be open in order to send data to a case, but you must have CaseMap installed on your computer.

2. Open **Concordance** and locate the document containing text that you want to send to the case.

3. In Concordance's **Browse** view, highlight the text and then right-click on it and click **Send to > CaseMap > New fact**.



Further to our meeting last Tuesday, we feel it is extremely important that we cmfy the terms of our
agreem siderable confusion amongst your staff, namely one Harry Hart, as to
the rem these terms wnended or waived unilaterally, unless there is an
outstan of such a reason any breach will be treated as a breach of a
conditic nages in addition to instantly terminating the contract. If your
commit t this letter is a true and fair summing up of our relationship, we will
be revie ship with your committee. We're sure that you would not relish the
termina ring in mind the substantial amount of work and profit our firm has
genera

Whilst note that we only billed you L450,000,000 in 1980. We do not
feel it w say that this firm has virtually worked for nothing. We are possibly
the only ancial and legal intricacies of Cowco's current predicament and to
that effe t in the event of any arrangement being realised. Few firms would
be prep breadth of the Goniff JA Mess.

OUR SERVICES TO YOUR COMM

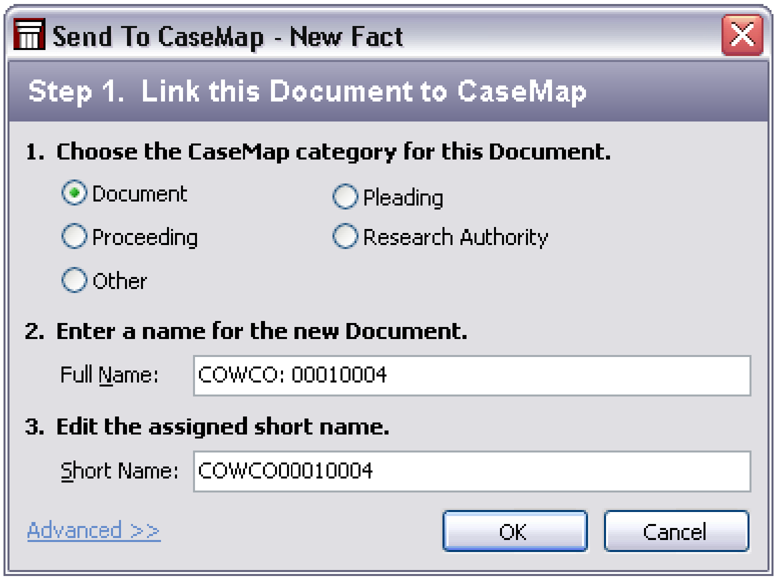
1. Advising and researching the cc

This will be supervised by one of our best teams. I personally will be responsible for their selection.
We'll require at least fifteen of our most experienced fee earners on this job.

Copy
View image
Font
Print record...
Print selection...
New note...
Edit note...
Run attachment
Save attachment as...
Send to
Total Litigator
CaseMap
Sanction
Synthetix
New fact...
Send current document...
Send all documents in query...

4. In the message box regarding Unicode, click **OK**.

5. In the **Send to CaseMap - New Fact** dialog box, select the spreadsheet in which you want to import data.



Send To CaseMap - New Fact

Step 1. Link this Document to CaseMap

1. Choose the CaseMap category for this Document.

● Document ○ Pleading
○ Proceeding ○ Research Authority
○ Other

2. Enter a name for the new Document.

Full Name: COWCO: 00010004

3. Edit the assigned short name.

Short Name: COWCO00010004

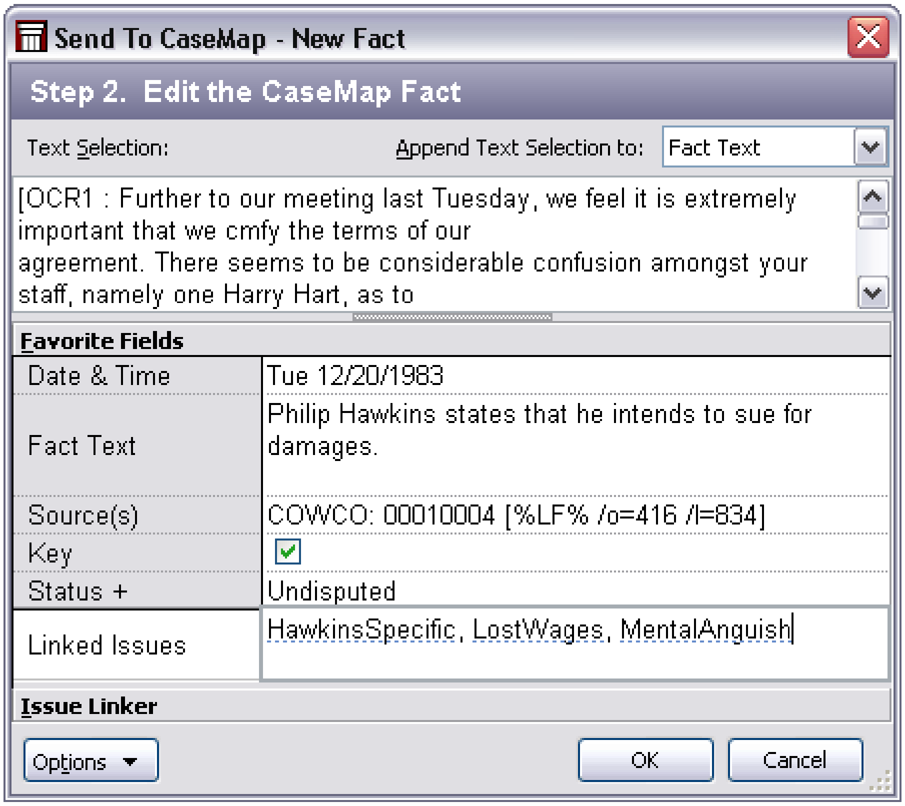
Advanced >>
OK
Cancel

Notice that the utility automatically inserts a full name and short name for the document, which you can modify before the import as needed.

6. In the **Enter a name for the new Document** field, type in the full name of the document or leave the default Concordance entry.

7. In the **Edit the assigned short name** field, type in the short name according to your internal guidelines.

8. Click **OK** to continue.



Send To CaseMap - New Fact

Step 2. Edit the CaseMap Fact

Text Selection: Append Text Selection to: Fact Text

[OCR1 : Further to our meeting last Tuesday, we feel it is extremely important that we cmfy the terms of our agreement. There seems to be considerable confusion amongst your staff, namely one Harry Hart, as to

Favorite Fields

| | |
|---|---|
| Date & Time | Tue 12/20/1983 |
| Fact Text | Philip Hawkins states that he intends to sue for damages. |
| Source(s) | COWCO: 00010004 [%LF% /o=416 /l=834] |
| Key | ☑ |
| Status + | Undisputed |
| Linked Issues | HawkinsSpecific, LostWages, MentalAnguish |

Issue Linker

9. In the **Send To CaseMap – New Fact** box, notice that the text you selected from the Concordance document displays in the **Text Selection** field.

⚠ 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.

10. In the **Append Text to Selection** field, select the spreadsheet field in which you want to send the data.

11. In the **Date & Time** field, type the date of the document record or when the fact occurred.

12. In the **Fact Text** field, type a summary of the fact content.

13. Check the **Key** box, if this is a key fact in the case.

14. Click in the **Status** field and select the appropriate type.

15. Click on the **Issue Linker** bar to link the fact directly to issues, then click **OK**.

    You may also type in issue short names in the Linked Issues field.

16. In the message box to view the content in CaseMap, click **Yes**.

    CaseMap launches and now displays the highlighted record in the spreadsheet you selected.

Notice that any fields you populated in the Send to CaseMap utility now display this information in spreadsheet fields.

17. Click on the paperclip icon for this record to verify that the link to the source document in Concordance is set and note that the file path displays in the **Linked File** field for this record.

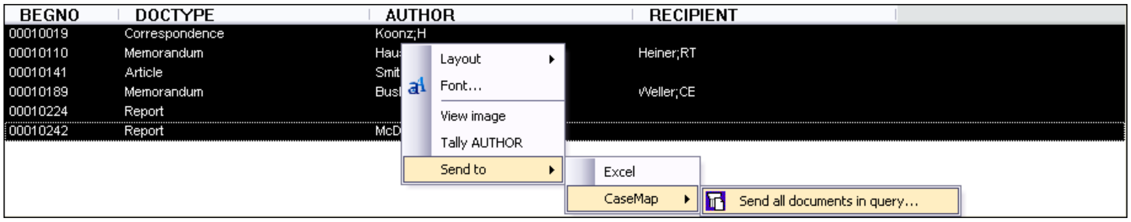
### To bulk import multiple records from Concordance

1. Open the **CaseMap** case that you want to import data into from Concordance.

   CaseMap does not need to be open in order to send data to a case, but you must have CaseMap installed on your computer.

2. Open **Concordance** and perform a search for documents you want to bulk import into the case.

3. In Concordance's **Table** view, right-click on the records and select **Send to > CaseMap > Send all documents in query**.



| BEGNO | DOCTYPE | AUTHOR | RECIPIENT |
|---|---|---|---|
| 00010019 | Correspondence | Koonz;H | |
| 00010110 | Memorandum | Hau | Heiner;RT |
| 00010141 | Article | Smit | |
| 00010189 | Memorandum | Busi | Weller;CE |
| 00010224 | Report | | |
| 00010242 | Report | McD | |

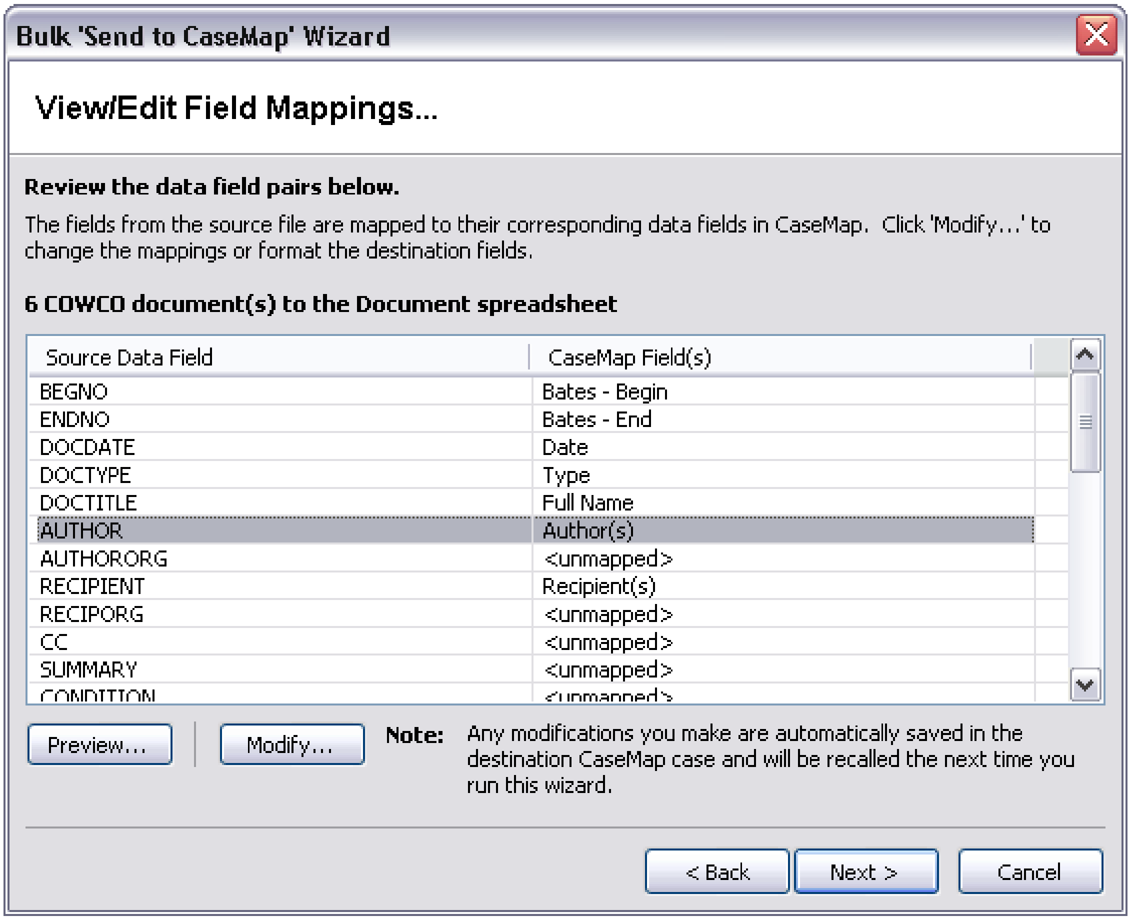
4. In the message box regarding Unicode, click **OK**.

5. In the **Concordance** box, click the **Continue** button to initiate the import process.

6. When the Bulk Send to CaseMap wizard launches, click **Yes** to edit the field mappings, then click **Next**.

7. In the **Please Confirm the Destination CaseMap Case** dialog box, verify the case and destination for the selected documents, then click **Next**.

8. In the **View/Edit Field Mappings** box, click the **Modify** button to map the records in the **Source Data Field** (from Concordance) to those in the **CaseMap Field(s)**, which display as <unmapped>.



**View/Edit Field Mappings...**

**Review the data field pairs below.**

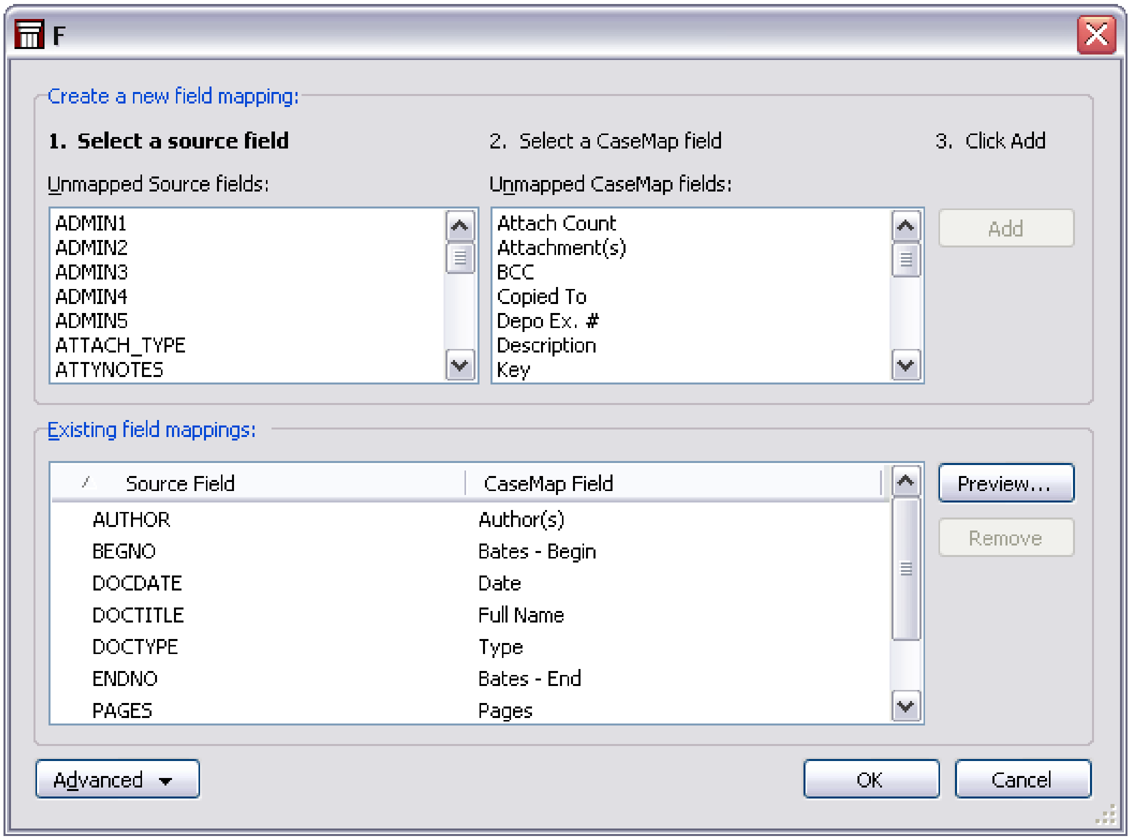
The fields from the source file are mapped to their corresponding data fields in CaseMap. Click 'Modify...' to change the mappings or format the destination fields.

**6 COWCO document(s) to the Document spreadsheet**

| Source Data Field | CaseMap Field(s) |
|---|---|
| BEGNO | Bates - Begin |
| ENDNO | Bates - End |
| DOCDATE | Date |
| DOCTYPE | Type |
| DOCTITLE | Full Name |
| AUTHOR | Author(s) |
| AUTHORORG | <unmapped> |
| RECIPIENT | Recipient(s) |
| RECIPORG | <unmapped> |
| CC | <unmapped> |
| SUMMARY | <unmapped> |
| CONDITION | <unmapped> |

**Note:** Any modifications you make are automatically saved in the destination CaseMap case and will be recalled the next time you run this wizard.

9. In the **Field Mappings** box, select a Concordance field in the **Unmapped Source** fields list.


F
Create a new field mapping:
1. Select a source field
2. Select a CaseMap field
3. Click Add
Unmapped Source fields:
Unmapped CaseMap fields:
Add
Existing field mappings:
Preview...
Remove
Advanced
OK
Cancel

Unmapped Source fields:
ADMIN1
ADMIN2
ADMIN3
ADMIN4
ADMIN5
ATTACH_TYPE
ATTYNOTES

Unmapped CaseMap fields:
Attach Count
Attachment(s)
BCC
Copied To
Depo Ex. #
Description
Key

| Source Field | CaseMap Field |
|---|---|
| AUTHOR | Author(s) |
| BEGNO | Bates - Begin |
| DOCDATE | Date |
| DOCTITLE | Full Name |
| DOCTYPE | Type |
| ENDNO | Bates - End |
| PAGES | Pages |

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**.

12. In the **View/Edit Field Mappings** box, click **Next**.

13. In the **You are about to send multiple records into CaseMap** dialog box, review the number of files selected and the CaseMap destination, then click **Finish**.

14. In the message prompt, review the number of records successfully imported into the case, then click **OK**.

15. Return to the **Documents** spreadsheet in CaseMap and review the new records to verify that the data displays in each mapped field correctly.

    Notice that the documents included in the bulk import are easily identifiable because the Bates – Begin and Bates – End numbers imported into the Documents spreadsheet fields.

    Also notice that the short names for these documents defaults to the Bates number.

    You can modify this according to your organization’s short name conventions.
16. Click on the paperclip icon for one of these records to verify that links to the source documents in Concordance are set and note that the file path displays in the **Linked File** field for this record.

Related Topics

About the Send to CaseMap tool
Sending transcripts to CaseMap
Sending research to CaseMap

### *Create new facts/extracts from annotations*

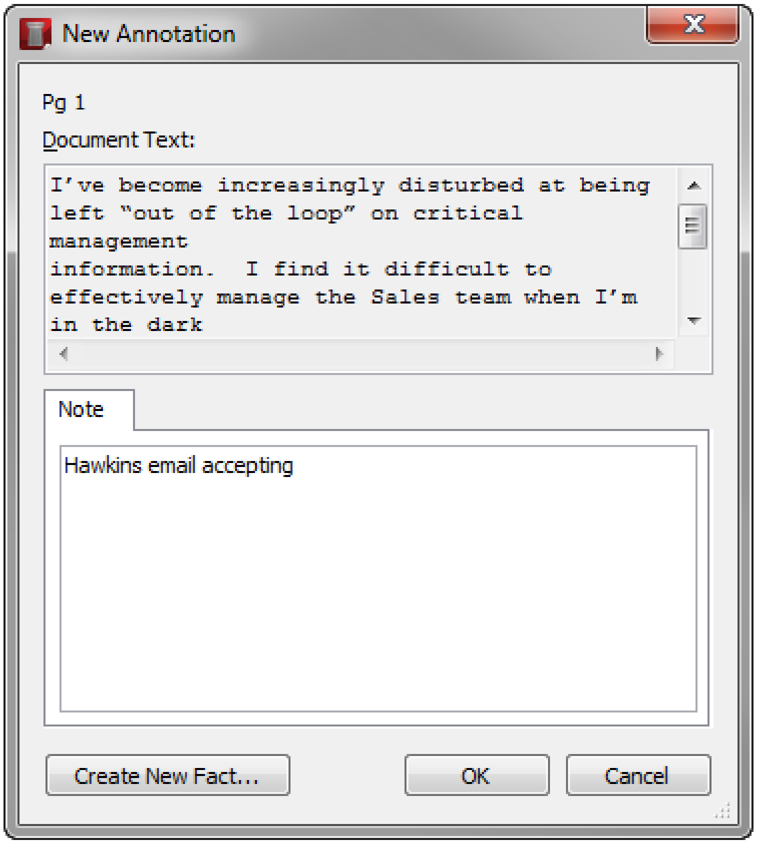
When reviewing documents in DocManager, you can create a new fact or research extract record from an annotation using the Send to CaseMap tool. The annotated text and any notes applied to the annotation will display in the Fact Text field on the Facts spreadsheet, or in the Extract Text field in the Extracts from Authorities and Authorities and Extracts research spreadsheets.

The document is linked to the case record and the page number for the annotation location displays in the Source(s) field of the Facts spreadsheet, or the Linked File field for research spreadsheets. When you click on the paperclip icon for the document record, it displays in DocManager on the page where the annotation text is located.

If you want to view or modify record detail for the document you are reviewing, you can access the record detail dialog box directly from DocManager by clicking Record Detail button.

#### ⊟ To create a new fact from an annotation

1. Open a document in **DocManager** and click **Annotate Text**.
2. Drag your mouse pointer over the text you want to annotate to open the **New Annotation** dialog box.



Pg 1

Document Text:

I've become increasingly disturbed at being
left "out of the loop" on critical
management
information. I find it difficult to
effectively manage the Sales team when I'm
in the dark

Note

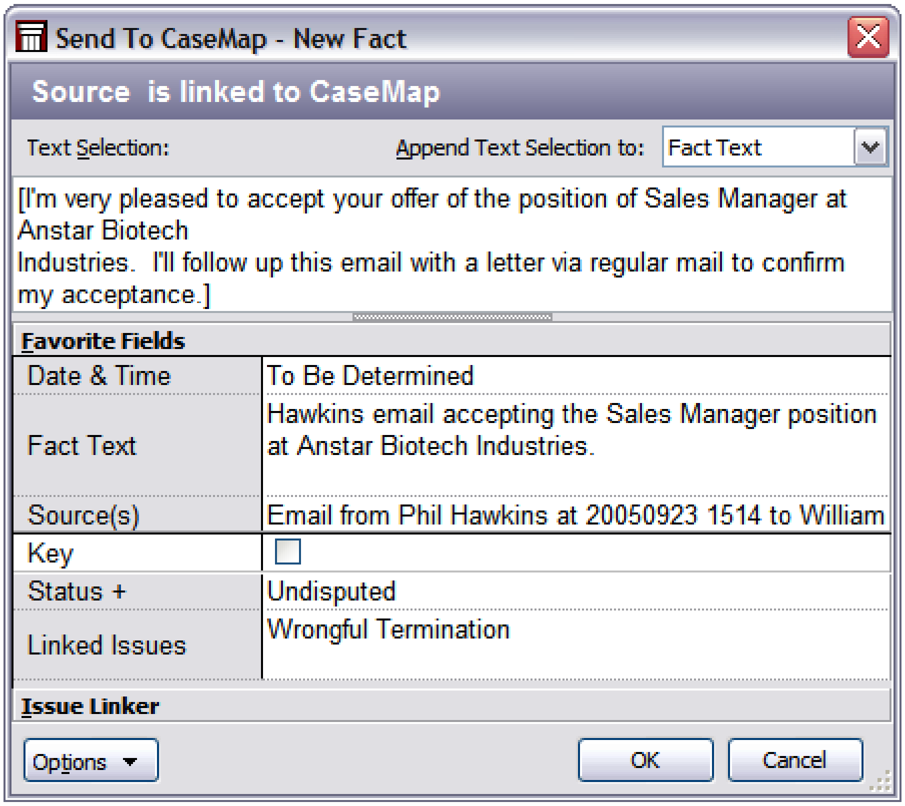
Hawkins email accepting

The text you selected displays in the Document Text box.

3. In the **Note** tab area, type in information you want.

4. Click the **Create New Fact** button to open the **Send to CaseMap - New Fact** dialog box.

   Notice that the excerpt you highlighted in the document now displays in the Text Selection field and is enclosed in brackets.


Send To CaseMap - New Fact
Source is linked to CaseMap
Text Selection:
Append Text Selection to:
Favorite Fields
Issue Linker
Options
OK
Cancel

Append Text Selection to: Fact Text

[I'm very pleased to accept your offer of the position of Sales Manager at Anstar Biotech
Industries. I'll follow up this email with a letter via regular mail to confirm my acceptance.]

| | |
|---|---|
| Date & Time | To Be Determined |
| Fact Text | Hawkins email accepting the Sales Manager position at Anstar Biotech Industries. |
| Source(s) | Email from Phil Hawkins at 20050923 1514 to William |
| Key | ☐ |
| Status + | Undisputed |
| Linked Issues | Wrongful Termination |

⚠ 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.

8. In the **Date & Time** field, type in the date of the fact.

9. In the **Fact Text** field, type in a short description of the fact, using short names to link the fact automatically to people entered in the Persons spreadsheet.

   This text description will display in the Fact Text field in the Facts spreadsheet.

10. Select the **Key** check box, if this fact record is important to the case.

11. In the **Status** field, select whether the fact is disputed or not.

12. In the **Linked Issues** field, type in the short name for any issues you want to link to this fact.

13. You can click the **Issue Linker** bar to select check boxes for each issue you want to link to the fact.

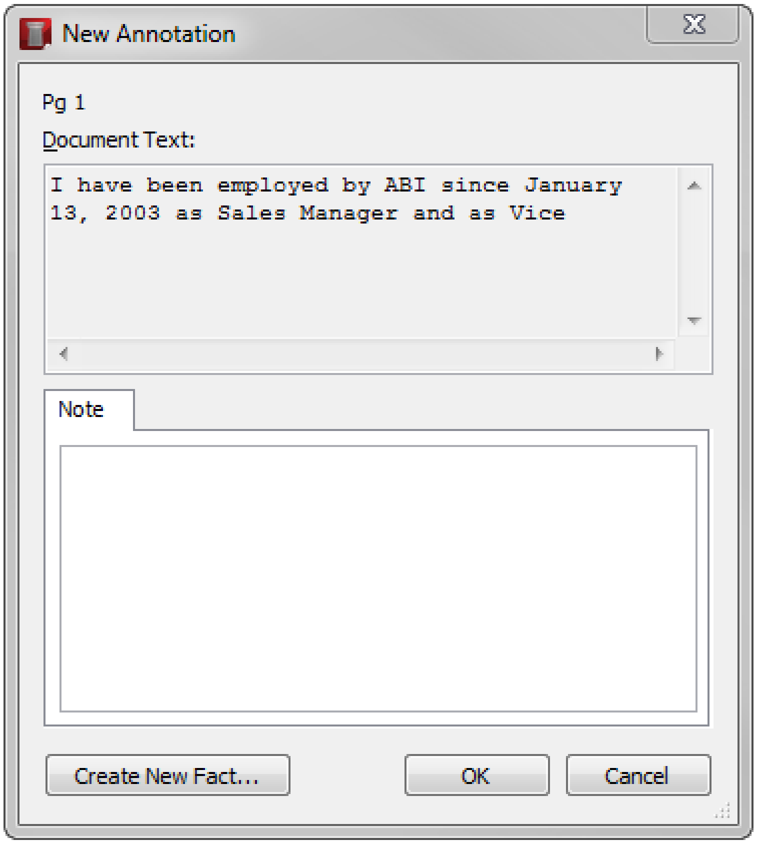
14. When you are finished, click **OK** to send the fact to CaseMap.

15. In the message box, click **Yes** to view the new fact in CaseMap.

    Notice that the new fact now displays in the Facts spreadsheet and is sorted according to the date.

### To create a new extract from an annotation

1. From the **Annotation mode** list, click **Annotate Text**.
2. Drag your mouse pointer over the text you want to annotate to open the New Annotation dialog box.

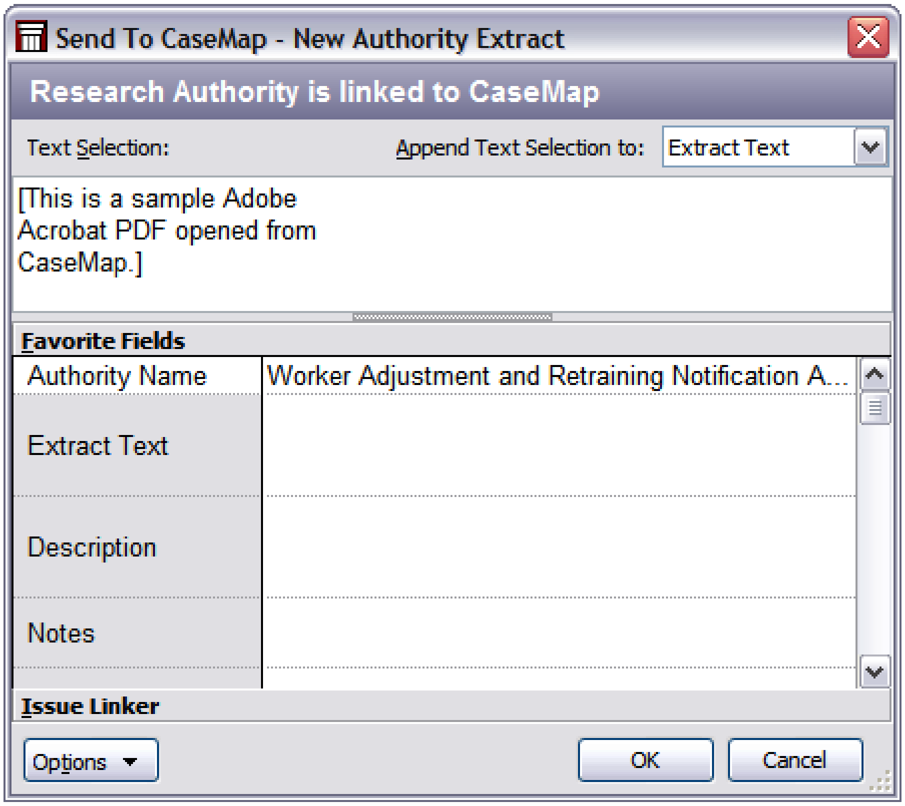


I have been employed by ABI since January
13, 2003 as Sales Manager and as Vice

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 Extract** button to open the Send to CaseMap - New Extract dialog box.

   Notice that the excerpt you highlighted in the document now displays in the Text Selection field and is enclosed in brackets. The brackets indicate that a link is set from the extract record to the source file.


Send To CaseMap - New Authority Extract
Research Authority is linked to CaseMap
Favorite Fields
Extract Text
Description
Notes
Issue Linker
Options
OK
Cancel

Text Selection:

Append Text Selection to: Extract Text

[This is a sample Adobe Acrobat PDF opened from CaseMap.]

Authority Name: Worker Adjustment and Retraining Notification A...

⚠ 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.

5. In the **Text Selection** field, review the extract you highlighted in the extract file.
6. Type in any additional field information you want to add to the extract record.
7. Click on the **Issue Linker** bar at the bottom of the box and select check boxes for applicable issues to link this extract.
8. When you are finished, click **OK**.
9. In the **Case Shortcuts** pane, click on the **Extracts and Authorities** spreadsheet.

   The new extract record displays with a link to the source file and the annotated text displaying in the Extract Text field.

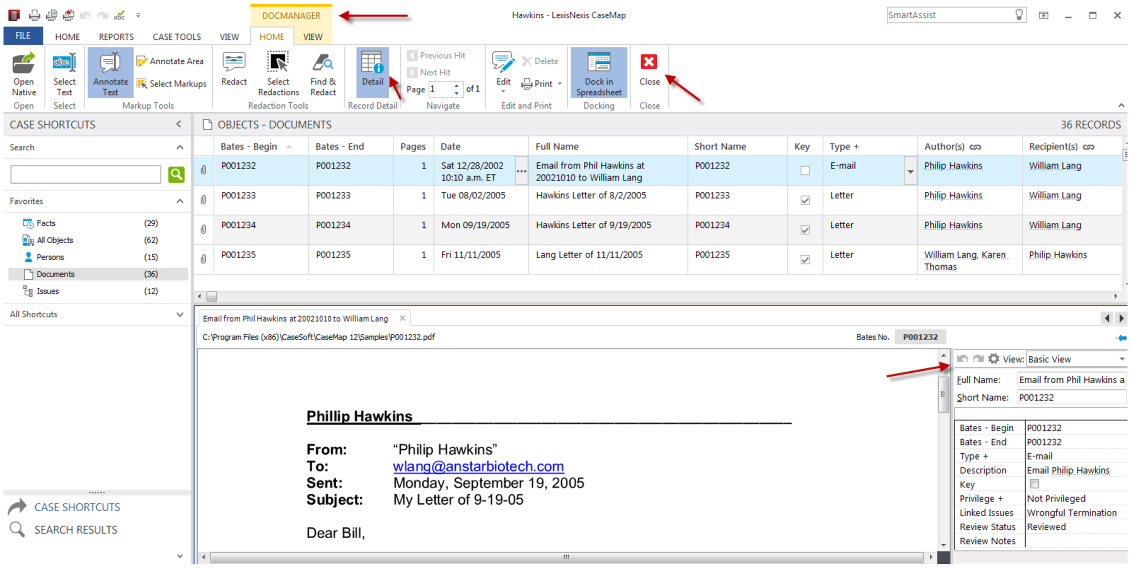
### ⊟ To view record detail

1. On the **DocManager** toolbar, click the **Detail** button.

   You can also click the Home ribbon and then click Detail Detail.

   The Detail button is highlighted and the Detail sidebar is displayed to the right side of the document in the DocManager.

Once a document is closed and reopened, the Record Detail Sidebar no longer exist and must be re-established.


DOCMANAGER
Hawkins - LexisNexis CaseMap
SmartAssist
FILE
HOME
REPORTS
CASE TOOLS
VIEW
HOME
VIEW
Open Native
Open
Select Text
Select
Annotate Text
Annotate Area
Select Markups
Markup Tools
Redact
Select Redactions
Find & Redact
Redaction Tools
Detail
Record Detail
Previous Hit
Next Hit
Page 1 of 1
Navigate
Edit
Delete
Print
Edit and Print
Dock in Spreadsheet
Docking
Close
Close
CASE SHORTCUTS
Search
Favorites
Facts (29)
All Objects (62)
Persons (15)
Documents (36)
Issues (12)
All Shortcuts
CASE SHORTCUTS
SEARCH RESULTS

OBJECTS - DOCUMENTS — 36 RECORDS

| Bates - Begin | Bates - End | Pages | Date | Full Name | Short Name | Key | Type + | Author(s) | Recipient(s) |
|---|---|---|---|---|---|---|---|---|---|
| P001232 | P001232 | 1 | Sat 12/28/2002 10:10 a.m. ET | Email from Phil Hawkins at 20021010 to William Lang | P001232 | ☐ | E-mail | Philip Hawkins | William Lang |
| P001233 | P001233 | 1 | Tue 08/02/2005 | Hawkins Letter of 8/2/2005 | P001233 | ☑ | Letter | Philip Hawkins | William Lang |
| P001234 | P001234 | 1 | Mon 09/19/2005 | Hawkins Letter of 9/19/2005 | P001234 | ☑ | Letter | Philip Hawkins | William Lang |
| P001235 | P001235 | 1 | Fri 11/11/2005 | Lang Letter of 11/11/2005 | P001235 | ☑ | Letter | William Lang, Karen Thomas | Philip Hawkins |

Email from Phil Hawkins at 20021010 to William Lang

C:\Program Files (x86)\CaseSoft\CaseMap 12\Samples\P001232.pdf

Bates No. P001232

**Phillip Hawkins**

**From:** "Philip Hawkins"
**To:** wlang@anstarbiotech.com
**Sent:** Monday, September 19, 2005
**Subject:** My Letter of 9-19-05

Dear Bill,

View: Basic View
Full Name: Email from Phil Hawkins a
Short Name: P001232

| | |
|---|---|
| Bates - Begin | P001232 |
| Bates - End | P001232 |
| Type + | E-mail |
| Description | Email Philip Hawkins |
| Key | ☐ |
| Privilege + | Not Privileged |
| Linked Issues | Wrongful Termination |
| Review Status | Reviewed |
| Review Notes | |

2. In the **Detail** dialog box, review and/or modify content for the case record.

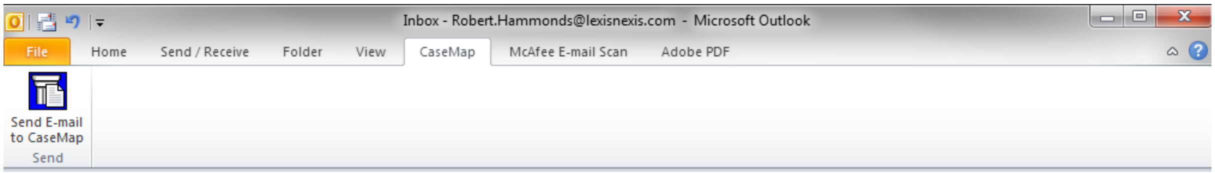
3. Click the **Close** button to save your changes.

**Related Topics**

About DocManager
Annotating documents
Editing annotations
Deleting annotations
Printing annotations
Docking and undocking the DocManager

### *Send Outlook emails to CaseMap*

You can send emails from Microsoft® Outlook (2007 and later) to your CaseMap case.


Inbox - Robert.Hammonds@lexisnexis.com - Microsoft Outlook
File
Home
Send / Receive
Folder
View
CaseMap
McAfee E-mail Scan
Adobe PDF
Send E-mail to CaseMap
Send

During the import process, emails are saved as .msg files to a folder you select. CaseMap provides a default list of fields mapped between Outlook and CaseMap spreadsheets. You can edit the default field mappings as needed. See To map email fields. Once you map the fields, CaseMap will remember your settings for the next time you or another case user sends emails to the case.

You can also preview the email before importing to review field data contents, including an attachment count and the name of attachments.

Once emails are imported into CaseMap, you can begin searching the new data as soon as the indexing process completes. When you click the paperclip icon for the new record, the email displays in CaseMap's DocManager.

You can only send emails to CaseMap v10+ cases. If you have a CaseMap v9.0 (or earlier) case open, CaseMap will send a message stating that the previous version case is not supported.

The Send Emails to CaseMap tool is part of the DocManager add-in program. If you have not purchased DocManager, you cannot use this feature. Contact your CaseMap Sales Representative to learn more information about this product.

## To send an Outlook email to CaseMap

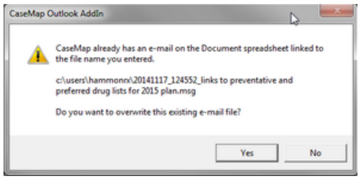
1. Open the CaseMap case that you want to import data into from Outlook.

You must have the CaseMap case open in order to send an email to it.

2. In **Outlook**, locate the email to be sent to the case and click the 'Send Email to CaseMap' button on the toolbar.

You can also right-click on the emails and then click 'Send Email to CaseMap'.

If the selected email was previously linked to CaseMap, a Duplicate Records dialog screen displays.



CaseMap already has an e-mail on the Document spreadsheet linked to the file name you entered.

c:\users\hammonrx\20141117_124552_links to preventative and preferred drug lists for 2015 plan.msg

Do you want to overwrite this existing e-mail file?

In the **Send Email to CaseMap Duplicate Records** dialog box, perform one of the following:

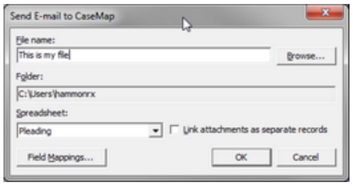
- Click **Yes** to overwrite the record.
- Click **No** and continue.

1. In the **Change file name** dialog box, click **OK**.

   The Send E-mail to CaseMap dialog box opens.

2. In the **File Name** box, change the file name and other pertinent information, and click **OK** to continue.

⊟ If selected email was not previously linked to CaseMap, the Send Email to CaseMap dialog box opens.



File name: This is my file

Folder: C:\Users\hammonrx

Spreadsheet: Pleading

a. Perform the following:

   - In the file name box, confirm the file name.
   - Click the Browse button, and in the 'Save Email as' dialog box, locate the folder to save the email, and then click Save.
   - In the Folder box, confirm the folder location.

   Emails are saved as .msg files, using the email subject as the file name.

All attachments will be stored in the Documents spreadsheet in CaseMap by default.

b. ⊟ Optional: Link attachments as separate records

   If you remove the check mark in the **Link attachments as separate records** check box the Spreadsheet box is enabled.

   1) Use the drop-down to select a spreadsheet from the list.

   2) Proceed to **Step c**.

c. Optional: Click the **Field Mappings** button to create/adjust field mappings.

   See To map email fields for more information.

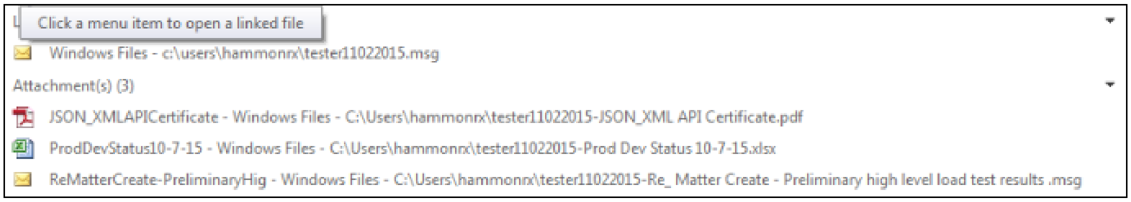
3. Click **OK** to initiate the import process.

   The email now displays in the Document spreadsheet with a link to the email in Outlook.

4. In **CaseMap**, go to the top of the Documents spreadsheet to see the new record created for the email.

The storage location (Documents spreadsheet) in CaseMap will be different if you chose a different spreadsheet above.

5. Click the **paperclip** icon for the record to display the linked file(s) information.



Click a menu item to open a linked file

Windows Files - c:\users\hammonrx\tester11022015.msg

Attachment(s) (3)

JSON_XMLAPICertificate - Windows Files - C:\Users\hammonrx\tester11022015-JSON_XML API Certificate.pdf

ProdDevStatus10-7-15 - Windows Files - C:\Users\hammonrx\tester11022015-Prod Dev Status 10-7-15.xlsx

ReMatterCreate-PreliminaryHig - Windows Files - C:\Users\hammonrx\tester11022015-Re_ Matter Create - Preliminary high level load test results .msg

Optional: Double-click on the paperclip to display the linked file in DocManager.

For more information, see About DocManager.

6. Optional: In **Outlook**, continue sending emails to CaseMap.

7. When you are finished, click the **Cancel** button in the **Send Email to CaseMap** dialog box.

### To bulk send Outlook emails to CaseMap

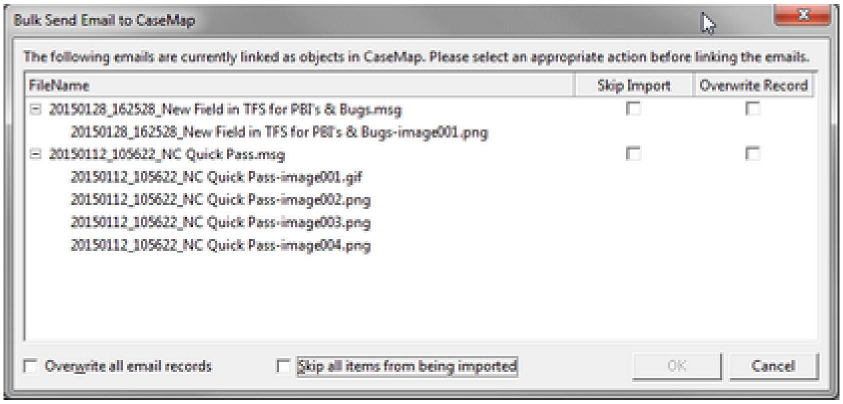
1. Open the CaseMap case that you want to import data into from Outlook.

You must have the CaseMap case open in order to send an email to it.

2. In **Outlook**, locate the emails to be sent to the case and click the 'Send Email to CaseMap' button on the toolbar.

You can also right-click on the emails and then click 'Send Email to CaseMap'.

If selected email(s) were previously linked to CaseMap, a Duplicate Records dialog screen displays.



The following emails are currently linked as objects in CaseMap. Please select an appropriate action before linking the emails.

| FileName | Skip Import | Overwrite Record |
|---|---|---|
| ⊟ 20150128_162528_New Field in TFS for PBI's & Bugs.msg | ☐ | ☐ |
| 20150128_162528_New Field in TFS for PBI's & Bugs-image001.png | | |
| ⊟ 20150112_105622_NC Quick Pass.msg | ☐ | ☐ |
| 20150112_105622_NC Quick Pass-image001.gif | | |
| 20150112_105622_NC Quick Pass-image002.png | | |
| 20150112_105622_NC Quick Pass-image003.png | | |
| 20150112_105622_NC Quick Pass-image004.png | | |

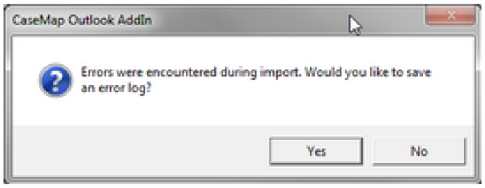
☐ Overwrite all email records ☐ Skip all items from being imported

a. In the **Bulk Send Email to CaseMap Duplicate Records** dialog box, place a check mark beside the action (**Skip Import** or **Overwrite Record**) for each record listed.

b. Optional: Select the **Overwrite all email records** or the **Skip all items from being imported** check box to perform that action for all listed items.

c. Click **OK** to continue.

⊟ Conditional: Errors were encountered during import



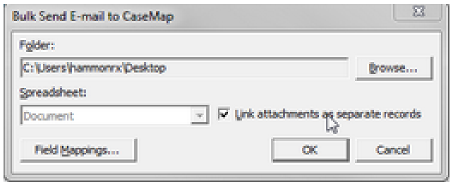
Errors were encountered during import. Would you like to save an error log?

1. Click **Yes** to save to error log.
2. In the **Save As** dialog box, choose a file storage location and click **Save**.

The Import Confirmation screen displays summarizing the number of records imported and/or skipped.

d. Click **OK** to continue.

⊟ If selected emails were not previously linked to CaseMap, the Bulk Send Email to CaseMap dialog box opens.



Folder: C:\Users\hammonrx\Desktop
Spreadsheet: Document
☑ Link attachments as separate records

a. Perform the following:

- In the Folder field, confirm the folder location.
- Click the Browse button, and in the **Save Email as** dialog box, locate the folder to save the email, and then click **Save**.

Emails are saved as .msg files, using the email subject as the filename.

All attachments will be stored in the Documents spreadsheet in CaseMap by default.

b. ⊟ Optional: Link attachments as separate records

If you remove the check mark in the **Link attachments as separate records** check box the Spreadsheet box is enabled.

1) Use the drop-down to select a spreadsheet from the list.

        2) Proceed to **Step c**.

    c. Optional: Click the **Field Mappings** button to create/adjust field mappings.

       See To map email fields for more information.

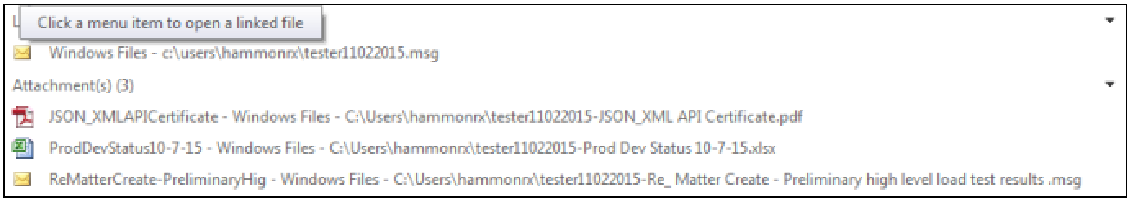
    d. Click **OK** to initiate the process.

       The Import Confirmation box displays displays.

3. Click **OK** to continue.
4. In **CaseMap**, go to the top of the Documents spreadsheet to see the new record created for the email.

> The storage location (Documents spreadsheet) in CaseMap will be different if you chose a different spreadsheet above.

5. Click the **paperclip** icon for this record to view the path and file attachments.



Click a menu item to open a linked file

Windows Files - c:\users\hammonrx\tester11022015.msg

Attachment(s) (3)

JSON_XMLAPICertificate - Windows Files - C:\Users\hammonrx\tester11022015-JSON_XML API Certificate.pdf

ProdDevStatus10-7-15 - Windows Files - C:\Users\hammonrx\tester11022015-Prod Dev Status 10-7-15.xlsx

ReMatterCreate-PreliminaryHig - Windows Files - C:\Users\hammonrx\tester11022015-Re_ Matter Create - Preliminary high level load test results .msg

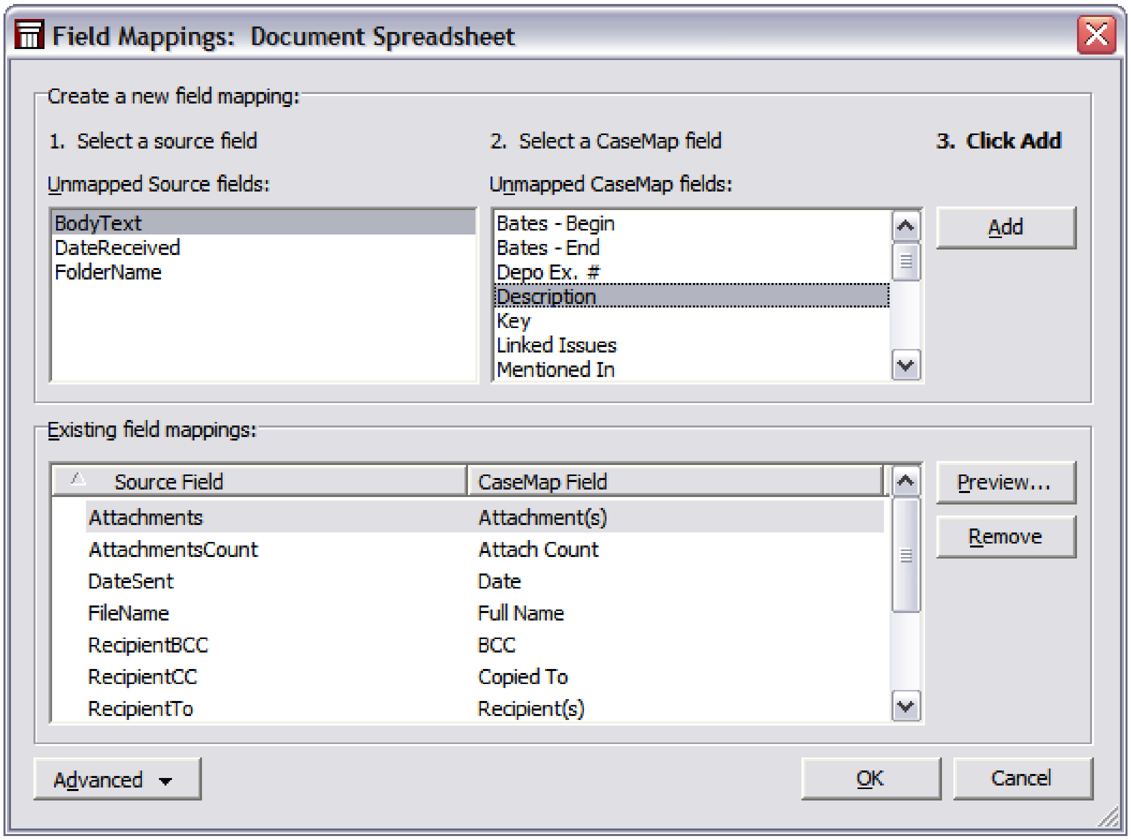
> Double-click the paperclip to open the file in CaseMap DocManager.

6. Optional: In **Outlook**, continue sending emails to CaseMap.
7. When you are finished, click the **Cancel** button in the **Send Email to CaseMap** dialog box.

### To map email fields

1. In **Outlook** , click the **Send Email to CaseMap** button to open the **Send Email to CaseMap** dialog box.
2. Click the **Field Mappings** button to display the **Field Mappings** dialog box.

   CaseMap provides a list of existing fields that are already mapped for you in the Existing field mappings box. You can modify the default list by clicking on the Remove button and re-mapping fields.


Field Mappings: Document Spreadsheet
Create a new field mapping:
1. Select a source field
2. Select a CaseMap field
3. Click Add
Unmapped Source fields:
Unmapped CaseMap fields:
Add
Existing field mappings:
Preview...
Remove
Advanced
OK
Cancel

Unmapped Source fields:
- BodyText
- DateReceived
- FolderName

Unmapped CaseMap fields:
- Bates - Begin
- Bates - End
- Depo Ex. #
- Description
- Key
- Linked Issues
- Mentioned In

| Source Field | CaseMap Field |
|---|---|
| Attachments | Attachment(s) |
| AttachmentsCount | Attach Count |
| DateSent | Date |
| FileName | Full Name |
| RecipientBCC | BCC |
| RecipientCC | Copied To |
| RecipientTo | Recipient(s) |

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** button to undo any existing field mappings.

   The fields will display in their respective boxes and will remain unmapped until you map them again.

### ⊟ To use advanced field mapping settings

Advanced field mapping settings allow you to add a source data field to field mappings list, and apply formatting to mapped fields (static text and hard returns). Once you send an email to CaseMap, the field mappings are share with other case users.

1. Click the **Advanced** button and then click **Advanced Mappings**.

2. In the **Document Spreadsheet fields** area, click your field mapping preference: **All fields**, **Mapped fields**, or **Unmapped fields**.

   This area defaults to displaying all mapped fields.

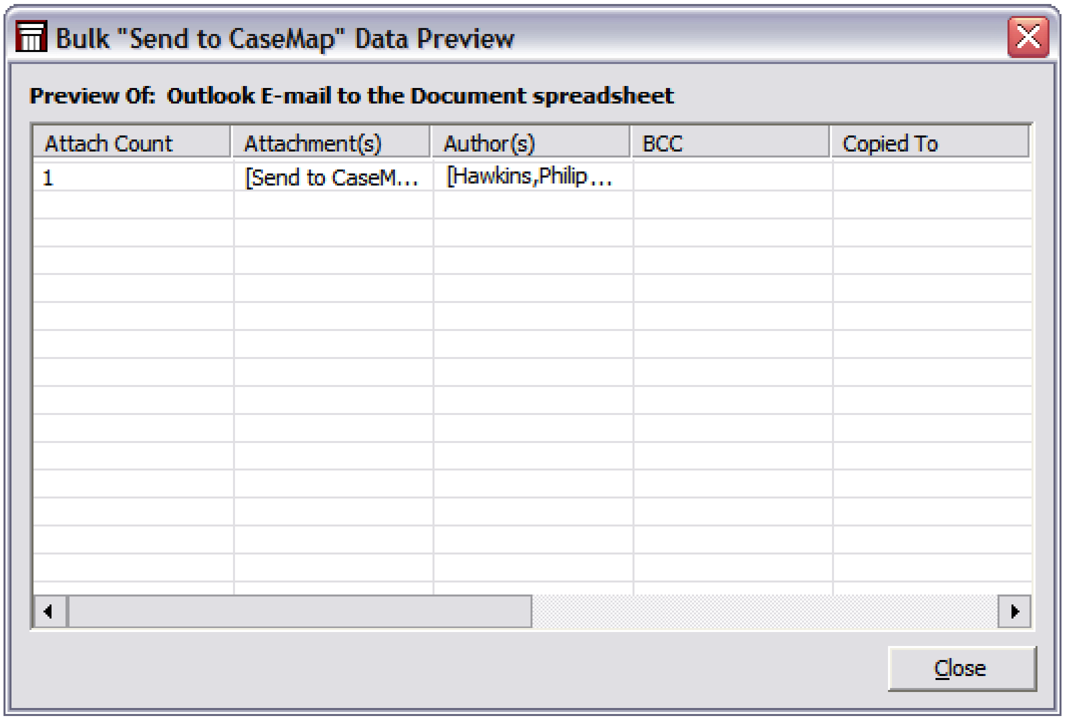
3. Select the field mapping structure you want to modify.
4. In the **Selected CaseMap Field** area, click the **Add**, **Modify**, or **Remove** buttons to review source field mapping types, apply formatting to fields, and to add/modify/ delete a source data field.
5. In the **Display Options** area, select check boxes to omit prior or next fields if the field value is blank.
6. Select the **Link Object short names** check box to automatically link short names for the selected field.

   This option only works in Description fields.
7. Select the **Always update** field to enable this option for the selected field.
8. Click **OK** to save your changes.
9. In the Field Mappings dialog box, click **OK** when you are finished.
10. In the **Send Email to CaseMap** dialog box, click **Cancel** to exit the tool.

To reset field mappings to the default structure, click the Advanced button and click Reset to Default Mappings.

### To preview emails prior to sending

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.



Preview Of: Outlook E-mail to the Document spreadsheet

| Attach Count | Attachment(s) | Author(s) | BCC | Copied To |
|---|---|---|---|---|
| 1 | [Send to CaseM... | [Hawkins,Philip... | | |

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.

### To save a list of field mappings

1. In **Outlook**, click the **Send Email to CaseMap** button.
1. In the **Send Email to CaseMap** dialog box, click the **Field Mappings** button.
2. In the **Field Mappings** dialog box, click the **Advanced** button and then click **Save Mappings to File**.
3. In the **Save As** dialog box, navigate to the folder where you want to save the field mapping file.

Field mappings are saved as a .cmbulkmap file.

4. In the **File name** field, type a name for the field mappings.
5. Click **Save**.
6. In the **Field Mappings** dialog box, click **Close**.
7. In the **Send Email to CaseMap** dialog box, click **OK** to exit the utility.

Related Topics

About the Send to CaseMap tool
About DocManager

### *Send To CaseMap product integration*

Each of the products listed below provide a way to send facts in CaseMap.

The Send To CaseMap implementation for all the products works in a similar way across the products. After learning how to use Send To CaseMap with Adobe® Acrobat®, you know the basics of using it with Concordance, Summation, and so on.

The following table provides a list of products that implement the Send To CaseMap functionality.

| Send To CaseMap Product Integration | |
|---|---|
| **Send To CaseMap** | **Bulk Send To CaseMap** |
| Acrobat® | Acrobat® |
| ALCoder® | Hummingbird DM5®** |
| Binder®* | Interwoven FileSite®** |
| CaseLogistix® | Interwoven Worksite®** |
| Discovery Radar® | Concordance® |
| DocuMatrix® | LexisNexis CourtLink® |
| FileSite® | LexisNexis File and Serve® |
| Hummingbird DM5®** | Relativity® |

| Send To CaseMap Product Integration | |
|---|---|
| **Send To CaseMap** | **Bulk Send To CaseMap** |
| iCONECTnxt® | Summation** |
| IPRO® | WORLDOX®** |
| JFS Litigator's Notebook® | |
| LexisNexis Applied Discovery® | |
| Concordance®, Concordance Image®, Concordance Native Viewer® | |
| LexisNexis CourtLink® | |
| LexisNexis File & Serve® | |
| LexisNexis FYI Reviewer® | |
| LexisNexis Lexis Advance.com® | |
| LexisNexis TextMap® | |
| LexisNexis TimeMap® | |
| LexisNexis TimeMatters® | |
| LexisNexis® Quicklaw™ | |
| LiveNote® | |
| Nexidia® | |
| PDF Converter Enterprise® | |
| Prevail® | |
| Primafact® | |
| Relativity® | |
| Ringtail Legal® | |
| SmartDraw® | |
| Summation LG®* | |
| Trial Director® | |

| Send To CaseMap Product Integration | |
|---|---|
| **Send To CaseMap** | **Bulk Send To CaseMap** |
| WorkSite (iManage)®** | |
| WORLDOX®** | |
| ZyIMAGE® | |

* Requires a plug-in available at no charge. Click here to download.

** Requires a plug-in sold separately by LexisNexis CaseMap. For more information, call 800-543-6862 (Option 2, then Option 4) or email casemap.support@lexisnexis.com.

Related Topics

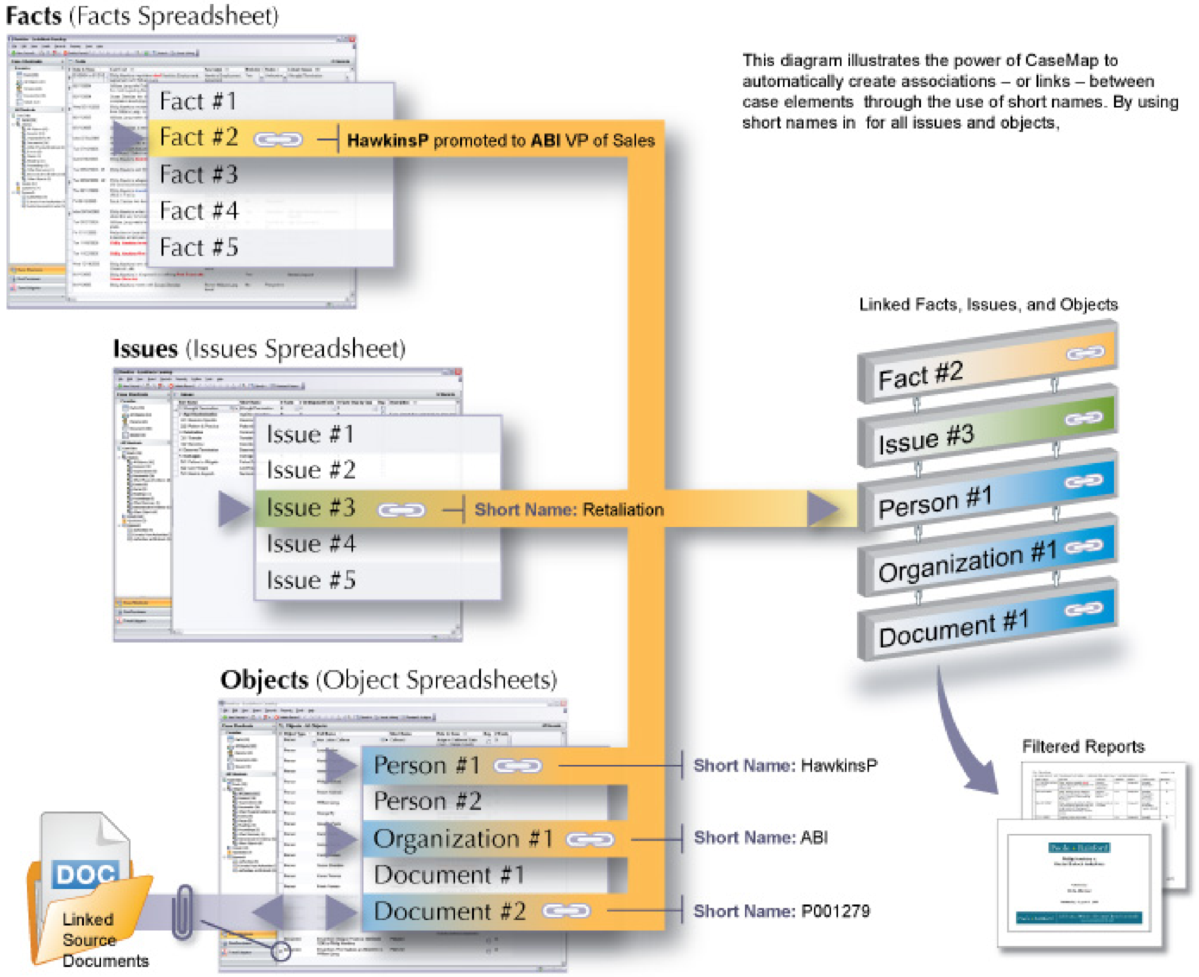
About the Send to CaseMap tool

## *Analyzing and Linking Data*

### About linking

CaseMap links data in two manners: linking data together between spreadsheets using short names or linking (attaching) a source file in a network folder to spreadsheet record.

The following diagram illustrates how CaseMap automatically creates data associations — or links — between case elements by using short names. The bottom left of the diagram illustrates how source files can be attached (linked) to case records in some object spreadsheets. Linking to question and research records is also possible.



This diagram illustrates the power of CaseMap to automatically create associations – or links – between case elements through the use of short names. By using short names in for all issues and objects,

Facts (Facts Spreadsheet)
Fact #1
Fact #2
HawkinsP promoted to ABI VP of Sales
Fact #3
Fact #4
Fact #5
Issues (Issues Spreadsheet)
Issue #1
Issue #2
Issue #3
Short Name: Retaliation
Issue #4
Issue #5
Objects (Object Spreadsheets)
Person #1
Short Name: HawkinsP
Person #2
Organization #1
Short Name: ABI
Document #1
Document #2
Short Name: P001279
DOC
Linked Source Documents
Linked Facts, Issues, and Objects
Fact #2
Issue #3
Person #1
Organization #1
Document #1
Filtered Reports

## ⊟ Link data together within the case

Links are data connections between two case elements, such as a the connection between a witness (Objects > Persons spreadsheet) and a fact record in the case (Facts spreadsheet) that mentions the witness.

Establishing links among case elements is a key step in organizing case information. Once case data is connected through links, you can search/filter, sort, and tag data to explore case arguments and strategy in new ways. For example, once facts are linked to issues, you can filter the Facts spreadsheet so that it displays only those fact related to a specific issue.

***Create the following types of data links:***

- Fact and the objects (e.g. document) or objects that are the source(s) of the fact
- Fact and the issue or issues on which the fact bears
- Object and the issue or issues to which the objects relate
- Question and the fact, issue, or object that the question is about

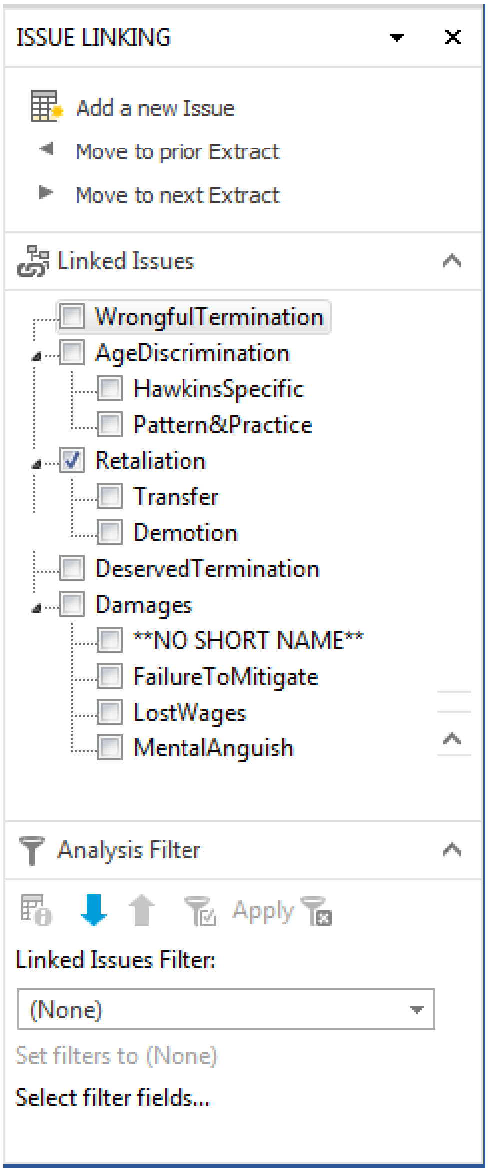
## ⊟ Use short names to automatically link data

Entering data using short names is the means in which CaseMap can link case elements together. Most linking is done automatically when bulk import case data using short names. If you are manually entering data, simply type using short names to link new records to objects already entered in the case.

For more information, see About short names.

## ⊟ Link to multiple issues using the Issue Linking pane

Linking spreadsheet records to case issues is a primary feature in CaseMap. The Issue Linking pane allows you to quickly link a record to multiple issues at a time. Use the arrow buttons within the pane to quickly navigate while analyzing records and linking issues.


ISSUE LINKING
Add a new Issue
Move to prior Extract
Move to next Extract
Linked Issues
☐ WrongfulTermination
☐ AgeDiscrimination
☐ HawkinsSpecific
☐ Pattern&Practice
☑ Retaliation
☐ Transfer
☐ Demotion
☐ DeservedTermination
☐ Damages
☐ **NO SHORT NAME**
☐ FailureToMitigate
☐ LostWages
☐ MentalAnguish
Analysis Filter
Apply
Linked Issues Filter:
(None)
Set filters to (None)
Select filter fields...

For more information, see the help topics on how to analyze and link facts, questions, objects, and research.

## Link to multiple issues using the Bulk Issue Linker

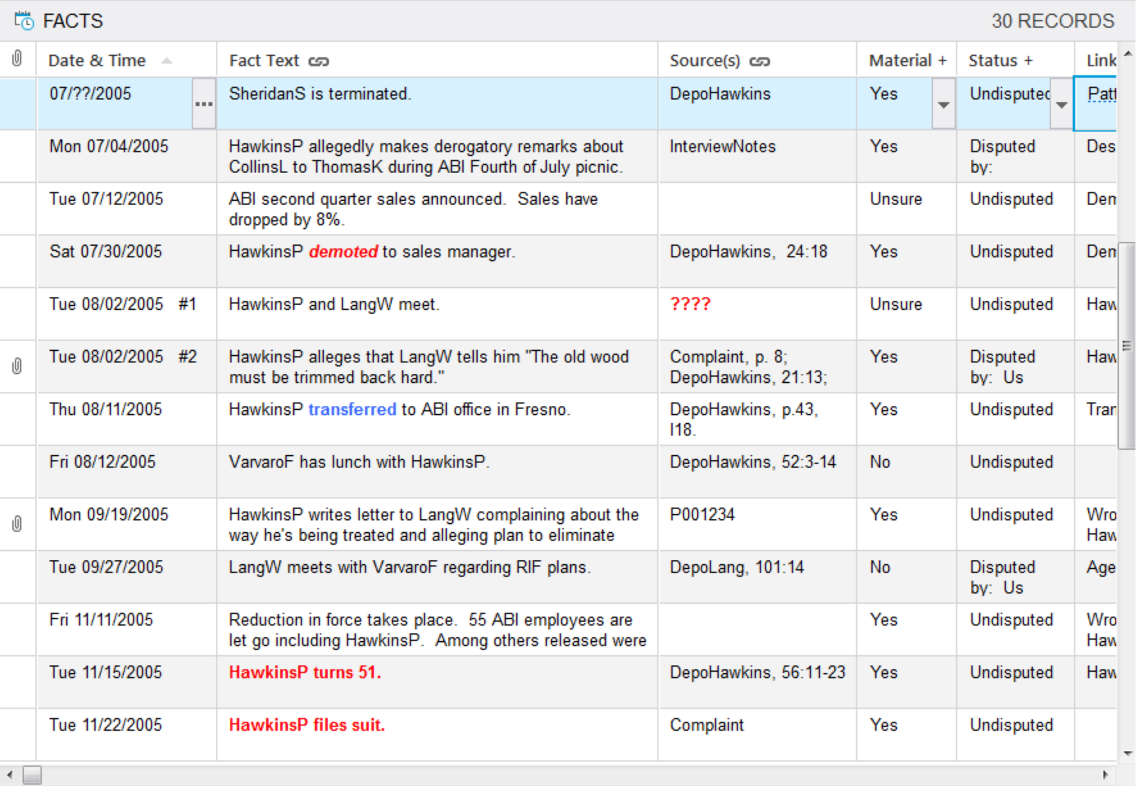
The Bulk Issue Linker tool allows you to link all records in a spreadsheet view to one or more issues at one time, as opposed to linking individual case records to one or more issues as you analyze records. This tool is useful when you sort a spreadsheet to view only those records you want to link to a particular issue. Then you can run the utility to link all spreadsheet records in view to one or more issues of your choosing.

> We recommend that you make a backup copy of the case before making any global changes, like linking multiple records at one time. Restoring a backup copy is the only way to undo global changes to case data.

For more information, see Using the Bulk Issue Linker.

## Review linked record data in List dialog boxes

Linked elements for each record can easily be viewed in list dialog boxes accessible from the # Field you want to analyze. Click on the Ellipsis button in a # Field cell. List dialog boxes can be printed for reference.



FACTS 30 RECORDS

| 📎 | Date & Time | Fact Text | Source(s) | Material + | Status + | Link |
|---|---|---|---|---|---|---|
| | 07/??/2005 | SheridanS is terminated. | DepoHawkins | Yes | Undisputec | Patt |
| | Mon 07/04/2005 | HawkinsP allegedly makes derogatory remarks about CollinsL to ThomasK during ABI Fourth of July picnic. | InterviewNotes | Yes | Disputed by: | Des |
| | Tue 07/12/2005 | ABI second quarter sales announced. Sales have dropped by 8%. | | Unsure | Undisputed | Den |
| | Sat 07/30/2005 | HawkinsP *demoted* to sales manager. | DepoHawkins, 24:18 | Yes | Undisputed | Den |
| | Tue 08/02/2005 #1 | HawkinsP and LangW meet. | ???? | Unsure | Undisputed | Haw |
| 📎 | Tue 08/02/2005 #2 | HawkinsP alleges that LangW tells him "The old wood must be trimmed back hard." | Complaint, p. 8;<br>DepoHawkins, 21:13; | Yes | Disputed by: Us | Haw |
| | Thu 08/11/2005 | HawkinsP transferred to ABI office in Fresno. | DepoHawkins, p.43, l18. | Yes | Undisputed | Trar |
| | Fri 08/12/2005 | VarvaroF has lunch with HawkinsP. | DepoHawkins, 52:3-14 | No | Undisputed | |
| 📎 | Mon 09/19/2005 | HawkinsP writes letter to LangW complaining about the way he's being treated and alleging plan to eliminate | P001234 | Yes | Undisputed | Wro<br>Haw |
| | Tue 09/27/2005 | LangW meets with VarvaroF regarding RIF plans. | DepoLang, 101:14 | No | Disputed by: Us | Age |
| | Fri 11/11/2005 | Reduction in force takes place. 55 ABI employees are let go including HawkinsP. Among others released were | | Yes | Undisputed | Wro<br>Haw |
| | Tue 11/15/2005 | **HawkinsP turns 51.** | DepoHawkins, 56:11-23 | Yes | Undisputed | Haw |
| | Tue 11/22/2005 | **HawkinsP files suit.** | Complaint | Yes | Undisputed | |

For more information, see About fields.

## Break links to remove the connection between case elements

You can break links within a case, if a link between a case record and an issue, or two case elements (such as a fact and object) needs to be broken. For more information, see How to break links.

Use caution before breaking a link between case elements. Once a link is broken, it is permanently removed from the case. To re-establish the link, you must reset it manually.

## Link case records to source files

CaseMap allows you to attach source files from a wide variety of file types and programs to case records. These source file paths are stored in a spreadsheet's Linked File field.

You can use CaseMap's DocManager near native file viewer to view linked files in your case. If you do not have a DocManager subscription, you can still view linked files by installing the native programs for each of these file types on your computer and including these programs to the File Viewers dialog box in CaseMap.

We recommend that you use the Import Linked Files Wizard to bulk import files into your case. Additionally, you can use CaseMap's DocManager add-in program to view linked files. To learn more about these features and more, see Importing linked files and About DocManager.

### Learn the native applications that can be viewed from within CaseMap

The following table provides a list of external applications that have source files types that can be linked to case records and opened for viewing from within CaseMap. You must have a license of the application installed on your computer in order to view the source files. All manufacturers and application names are registered trademarks.

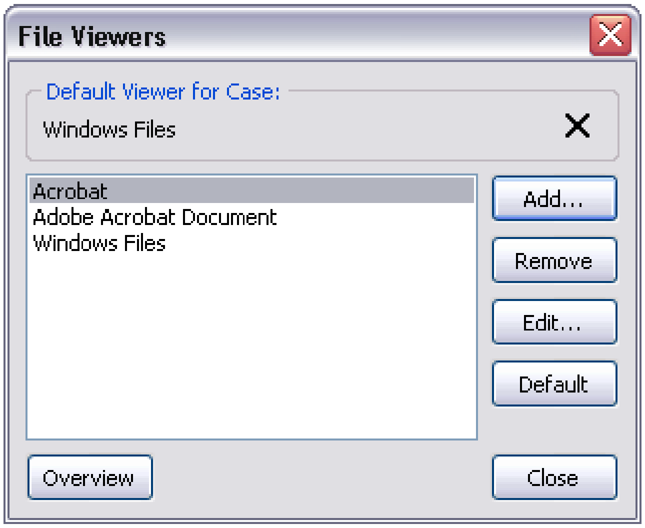
If your organization does not use one of the file viewer applications listed in the table, you still can configure the viewer to view documents from CaseMap. CaseMap supports DDE (dynamic data exchange), ActiveX Scripting, or Command Line Parameters so you can view documents. Contact your system administrator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

| External Applications | | | |
|---|---|---|---|
| | | | |
| Acrobat | File & Serve | Primafact | Word |
| ALCoder | FYI Reviewer | Ringtail Legal | WordPerfect |
| Applied Discovery | Hummingbird DM5 | Sanction | WorkSite (iManage) |
| Binder | iCONECTnxt | Stratify | WorlDoxGX |

| External Applications | | | |
|---|---|---|---|
| | | | |
| CaseLogistix | IPRO | Summation LG | ZyIMAGE |
| Concordance / Concordance Image | JFS Litigator's Notebook | Synthetix | Others to come |
| CourtLink | Lexis.com | TextMap | |
| Discovery Radar | LiveNote | TimeMap | |
| DocuMatrix | PDF Converter Pro | TimeMatters | |
| Excel | Prevail | Trial Director | |

### Set up file viewers to open linked files

The default file viewer in CaseMap is Microsoft® Word. To find out if you have additional file viewers set up in CaseMap, click on the Tools menu and click Linked Files, and then click Manage File Viewers on the submenu. The File Viewers dialog box displays a listing of all programs that have been added to your licensed copy of CaseMap. Here you can add, remove, and edit file viewers, as well as change the default viewer being used. Other users who want to view the same native source files need to ensure they have added the applications to the File Viewers dialog box too.



File Viewers

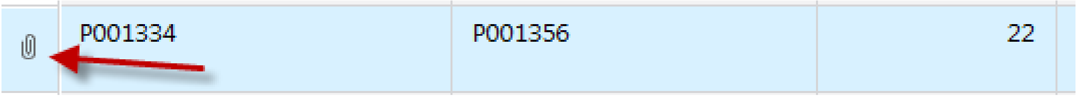
Default Viewer for Case: Windows Files

Acrobat
Adobe Acrobat Document
Windows Files

For more information on file viewers, see About file viewers and Adding/changing file viewers.

### View the source file within CaseMap

Case records that have a link to a source file display a paperclip icon to the far left of the record. Click on the paperclip icon to view the native file, directory path, and type of file that is linked to this record. You can also click on this link to view the source file in its native program. The file path to linked documents also displays in either the Linked File or the Related File fields.



| | | | |
|---|---|---|---|
| | P001334 | P001356 | 22 |

If the paperclip icon doesn't automatically display, click Home ribbon > More > Refresh Spreadsheet button, or click the New Record button and then click the spreadsheet once again to refresh it. If you link to a native source file that isn't added to the CaseMap File Viewer settings, the paperclip and file path won't display until the program is added to the File Viewer dialog box accessible from Case Tools > File Viewers submenu.

### Review the file types you can attach to case records

You can link case records to a variety of file types from external applications in the objects, questions, and research spreadsheets. The file types include text and transcript files, audio, video, digital photography and more. To view the source file within CaseMap, you simply need to add the external application to the list of file viewers and have the program installed on your machine.

The following table provides a listing of the types of files that can be attached to object records, depending on the object type.

**Source File Types to Link to Object Records**

| Object Spreadsheets | File Types and Use |
|---|---|
| Documents | Native files, Adobe Acrobat PDFs, emails |
| Other Physical Evidence | Source files that contain evidential information |
| Pleadings | Source files that are Complaints, Answers, Replies |
| Proceedings | Depositions, transcripts, grand jury hearings |
| Other Discovery | Any file types that need to be included in the case and do not apply to other object spreadsheets |
| Demonstrative Evidence | Charts, video, audio, digital photographs, blow-ups |
| Other Objects | Lexicon dictionaries, a document of key phrases used many times in a case |

Related Topics

About analyzing data
About file viewers
Adding/changing file viewers
Using the Bulk Issue Linker
Breaking links

## About analyzing data

Analyzing case data tells you what you already know and points the way to important information that you may need to know more about. Searching and sorting case information from various angles may offer insights not otherwise noticed. This process helps stimulate thinking among trial members and can reveal patterns that may be useful in achieving the best results for clients.

Remember to review each spreadsheet's fields (including hidden fields) to plan how you want to organize and track data. Many fields are distinct to each spreadsheet and some detail dialog boxes include additional fields that are not available in the spreadsheet view.

### ⊟ Analyze data using a variety of CaseMap tools

The following table describes the tasks and tools for analyzing data in CaseMap.

**Analyzing Data Overview**

| Tasks | Description |
|---|---|
| Linking Data | Creating links from one spreadsheet field to another to show relationships between people, events, and supporting evidence. |
| Searching/Filtering Data | Reviewing subsets of information to locate specific information. |
| Saving and Rerunning Searches | Capturing data updates for particular criteria you need to track. |
| Tagging Data | Marking particular records so they stand out among others in a spreadsheet view. |
| Sorting Data | Finding subsets of information for printing reports. |
| Viewing Data Timelines | Using CaseWide to analyze fact record trends in the case timeline. |

**Analyzing Data Overview**

| Tasks | Description |
|---|---|
| Evaluating Data | Using Evaluation fields and tools to identify strengths and weaknesses in case arguments and evidence. |

Related Topics

About linking

## Analyzing and linking documents

When organizing and reviewing your document collection, you need to consider the naming conventions you want to use for the document's full name and short name. If your documents are Bates stamped, you may want to use that number for the short name instead of the full name (which is abbreviated to 30 characters or less). For document records that are entered manually or imported using the Intake Interview Form, you need to manually create an attachment link to the corresponding source file stored in your case network folders.

When you are finished analyzing documents and linking to issues and source files, you can sort and search these records to print reports (like the Privilege Log) based on criteria needs.

***Primary fields used to track information include***: Bates - Begin and Bates - End, Date, Type, Author, Recipient, Description, Attachments, Review Status, Reviewed By, Linked File, and other similar field types.

***Primary fields used to analyze/categorize include***: Key, Type, Linked Issues, Source of Doc, Privilege, Producing Party, # Issues, # Facts, among others.

For more information on fields, see Objects spreadsheet field listing.

⊟ **To analyze documents**

1. In the **Case Shortcuts** pane, click on the **Documents** spreadsheet icon in the **All Shortcuts** pane.
2. Click on the record you want to analyze.
3. In the **Key** field, select the check box if this document is of particular importance.
4. In the **Type** cell, click on the drop-down arrow and click document type or type in a new entry.

5. Scroll to the right and locate the **Privilege** field.
6. In the **Privilege** cell, click the correct status: **Atty Work Product**, **Atty-Client, Atty-Client and Atty Work Product**, or **Not Privileged**.

   You can also type in a new entry for this field status.
7. In the **Review** cell, click **In Review**.

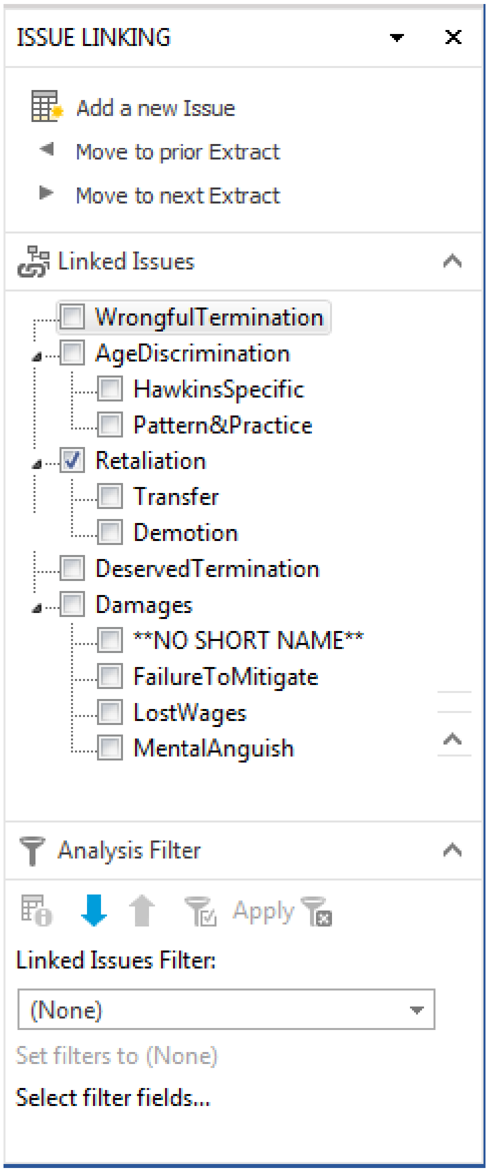
   When the document review is complete, the field status for the record can be changed to Reviewed.
8. Continue setting the status for fields as needed.

> Not all fields may display in a spreadsheet's default view. Some may be hidden and can be inserted as needed. Right-click on a field title bar and click Insert Fields to select a field you want to add to the spreadsheet. Select the check box for the field you want to add and click OK.

Data entered in spreadsheet cells is automatically saved as you navigate to a new cell or record.

### To link document records to case issues

1. In the **Documents** spreadsheet, click on the document record you want to link to an issue in the Issues spreadsheet.
2. On the **Home** ribbon, click on the **Issue Linking** button to open the **Linking Issues** pane.
3. In the **Linked Issues** pane, select check boxes for each issue that applies to the document record.


ISSUE LINKING
Add a new Issue
Move to prior Extract
Move to next Extract
Linked Issues
☐ WrongfulTermination
☐ AgeDiscrimination
☐ HawkinsSpecific
☐ Pattern&Practice
☑ Retaliation
☐ Transfer
☐ Demotion
☐ DeservedTermination
☐ Damages
☐ **NO SHORT NAME**
☐ FailureToMitigate
☐ LostWages
☐ MentalAnguish
Analysis Filter
Apply
Linked Issues Filter:
(None)
Set filters to (None)
Select filter fields...

Notice that you can use the Move to Next and Move to Prior buttons in the Issue Linking pane to navigate the records in the spreadsheet.

4. Click in the **Linked Issues** field for a document to view all linked issues for this record.

5. Continue linking document records to case issues as needed.

   Data entered in spreadsheet cells is automatically saved as you navigate to a new cell or record.

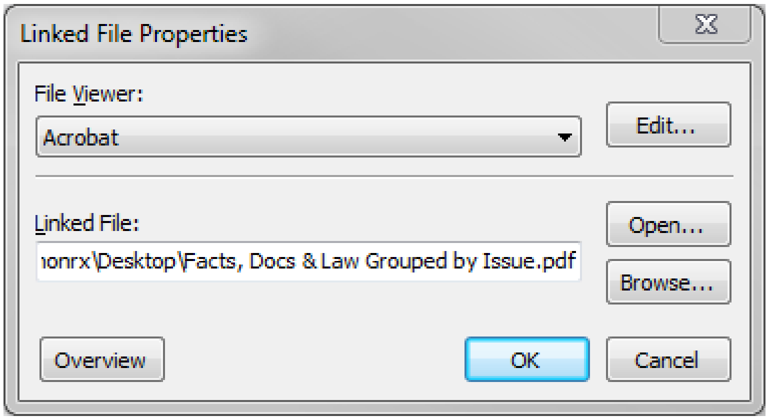
### ⊟ To link document records to source files

1. In the **Documents** spreadsheet, click on the document record you want to link to a source file.

2. Scroll to the far right of the spreadsheet to locate the **Linked File** field.

3. In the **Linked File** cell, click on the **Ellipsis** button for this record.

4. In the **Linked File Properties** box under **File Viewers**, click on the file viewer (e.g., Acrobat) needed for opening the source file.



Linked File Properties

File Viewer: Acrobat

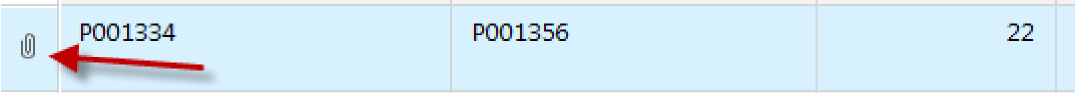
Linked File: onrx\Desktop\Facts, Docs & Law Grouped by Issue.pdf

5. Click the **Browse** button to navigate to the folder where this source file is stored and select it.

6. Click to **Open** and then **OK** to set the linked path to this source file.

7. The file's directory path now displays in the **Linked File** field for this document record.

8. Scroll to the far left of the spreadsheet and notice that a paperclip icon now displays next the document record.



| | | |
|---|---|---|
| P001334 | P001356 | 22 |

9. Double-click on the paperclip icon to view the native file, directory path, and type of file that is linked to this record. You can also double-click on the paperclip icon to view the source file in its native program.

> If the paperclip icon doesn't automatically display, click the Home ribbon > More button > Refresh Spreadsheet button, or click the New Record button and then reselect the spreadsheet to refresh it. If you link to a native source file that isn't added to the CaseMap File Viewer settings, the paperclip and file path won't display until the program is added to the File Viewer dialog box accessible on the Case Tools > File Viewers.

For more information, see Adding/changing file viewers.

Related Topics

About linking
About analyzing data
Objects spreadsheet field list

## Analyzing and linking facts

As your Fact Chronology grows, you want to ensure that you differentiate between facts and quotes, or confidential information. Fact Text entries should be concise statements of an event that are linked to other case elements by typing with short names in this field. Longer text excerpts or quotes should be organized in the Source Quote field or Privilege Notes field to keep information from printing on reports and to preserve any confidential data. For fact records that are entered manually or imported using the Intake Interview Form, you need to manually create an attachment link to the corresponding source files store in your case network folders.

When you are finished analyzing facts and linking to issues, you can sort and search these records to print reports based on criteria needs. Print the Facts by Issues Report to track disputed items, or print the Summary Judgment Report for undisputed facts.

***Primary fields used to track information include***: Date & Time, Fact Text, Source Quote, Source(s), and other similar field types.

***Primary fields used to analyze/categorize include***: Material, Status, Linked Issues, Key, # Issues, # Questions, Privilege Notes, Attorney Notes, among others.

For more information on fact fields, see Facts spreadsheet field listing.

### To analyze facts

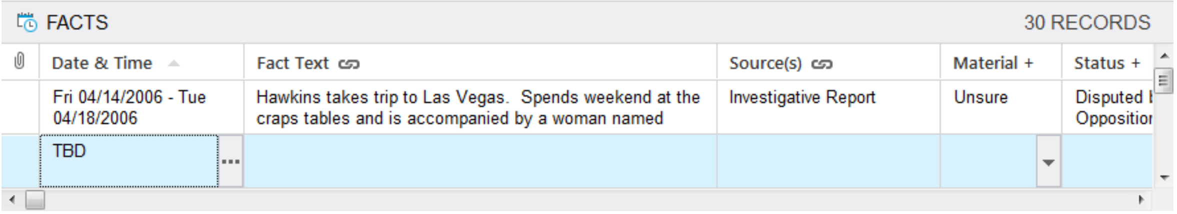
1. In the **Case Shortcuts** pane, click on the **Facts** spreadsheet icon in the **Favorites** pane.
2. Click on the record you want to analyze.
3. In the **Material** cell, click **Yes**, **No**, or **Unsure** to mark facts as having material relevance.
4. In the **Status** cell, click the disputed status for the fact: **Disputed by Opposition**, **Disputed by Us**, **Prospective**, **Undisputed**, or **Unsure**.
5. Continue setting the status for fields as needed.

> Not all fields may display in a spreadsheet's default view. Some may be hidden and can be inserted as needed. Right-click on a field title bar and click Insert Fields to select a field you want to add to the spreadsheet. Select the check box for the field you want to add and click OK.

Data entered in spreadsheet cells is automatically saved as you navigate to a new cell or record.

### To links facts to objects

When you enter fact records, you should always type using short names so that you automatically link the records with an object (people, organizations, documents, etc.) In the following example, notice how the names in the Fact Text field display as short names indicating a link to the object record for these people. If you clicked in the Source(s) field for this record, DepoLang would also be underlined in blue indicating a link to the object in the Proceeding spreadsheet.



FACTS 30 RECORDS

| Date & Time | Fact Text | Source(s) | Material + | Status + |
|---|---|---|---|---|
| Fri 04/14/2006 - Tue 04/18/2006 | Hawkins takes trip to Las Vegas. Spends weekend at the craps tables and is accompanied by a woman named | Investigative Report | Unsure | Disputed<br>Oppositio |
| TBD | | | | |

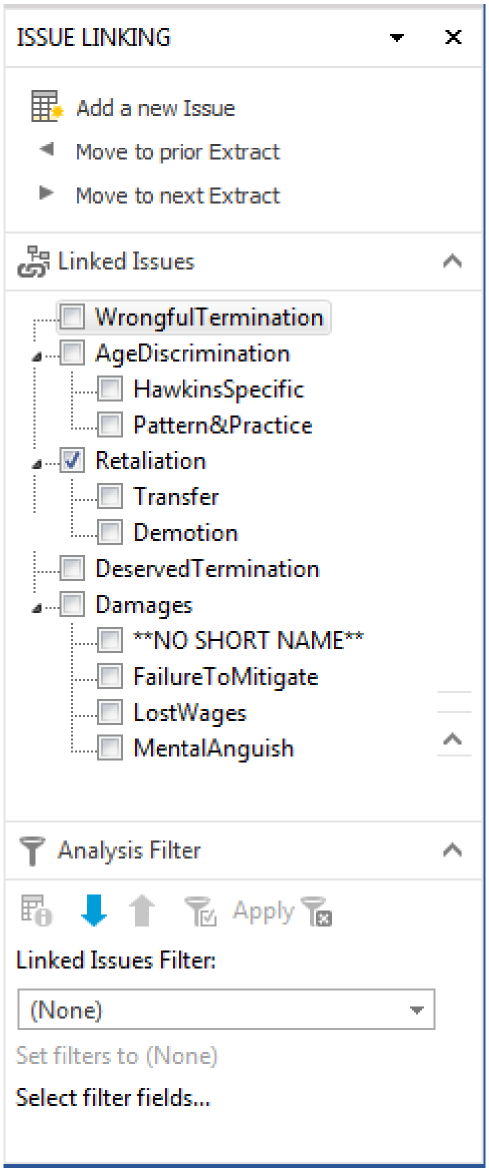
For more information, see Entering facts.

### To link facts to case issues

1. In the **Facts** spreadsheet, click on the fact record you want to link to an issue in the Issues spreadsheet.

2. Click on the **Issue Linking** button on the **Home** ribbon to open the **Linking Issues** pane.

3. In the **Linked Issues** pane, select check boxes for each issue that applies to the document record.


ISSUE LINKING
Add a new Issue
Move to prior Extract
Move to next Extract
Linked Issues
☐ WrongfulTermination
☐ AgeDiscrimination
☐ HawkinsSpecific
☐ Pattern&Practice
☑ Retaliation
☐ Transfer
☐ Demotion
☐ DeservedTermination
☐ Damages
☐ **NO SHORT NAME**
☐ FailureToMitigate
☐ LostWages
☐ MentalAnguish
Analysis Filter
Apply
Linked Issues Filter:
(None)
Set filters to (None)
Select filter fields...

Notice that you can use the Move to Next and Move to Prior buttons in the Issue Linking pane to navigate the records in the spreadsheet.

4. Click in the **Linked Issues** field for a fact to view all linked issues for this record.

5. Continue linking fact records to case issues as needed.

   Data entered in spreadsheet cells is automatically saved as you navigate to a new cell or record.

Insert the # Issues field in the Facts spreadsheet so you can see the issues affecting each fact record.

Related Topics

About linking
About analyzing data
Facts spreadsheet field list

## Analyzing and linking objects

The All Objects spreadsheet is where you can view all object records in the case in one view. Or you can view case records in one of the many sub-level objects spreadsheets that categorize objects by type (such as persons, organizations, documents, events, etc.).

You can analyze data in each of these spreadsheets as well as link records to source files stored in a network folder. Most of the fields in the All Objects spreadsheet default view have probably been populated with data when you first manually entered the case record, created an initial Cast of Characters using the Case Jumpstart wizard, or imported the data into the case.

However, you may want to double-check certain fields (such as the Key field) to ensure that you've adequately categorized information according to your organization's internal guidelines. The Key field is the primary field used to categorize information in each object spreadsheet. Sub-level objects spreadsheets include fields distinct to each type and may have additional status fields that you want to use to categorize information. For example, the Documents spreadsheet includes the Source of Doc, Privilege, Review Status, Reviewed By that help you further define a case record. The Pleadings spreadsheet includes a Type field specific to the type of pleading entered (Answer, Complaint, Reply). Ensure that you are familiar with each object sub-level spreadsheet fields and which ones case staff has agreed are important to track and categorize case records.

For more information on fields, see Objects spreadsheet field list.

### ⊟ To analyze objects

1. In the **Case Shortcuts** pane, click on the **All Objects** spreadsheet icon in the **Favorites** pane or a sub-level spreadsheet icon in the **All Shortcuts** pane.
2. Click on the record you want to analyze.
3. Double-click the **Key** check box if the record is particularly important to the case.
4. Continue entering information for any other fields as needed.

> 📝 Not all fields may display in a spreadsheet's default view. Some may be hidden and can be inserted as needed. Right-click on a field title bar and click Insert Fields to select a field you want to add to the spreadsheet. Select the check box for the field you want to add and click OK.

Data entered in spreadsheet cells is automatically saved as you navigate to a new cell or record.

For more information, see Entering objects.

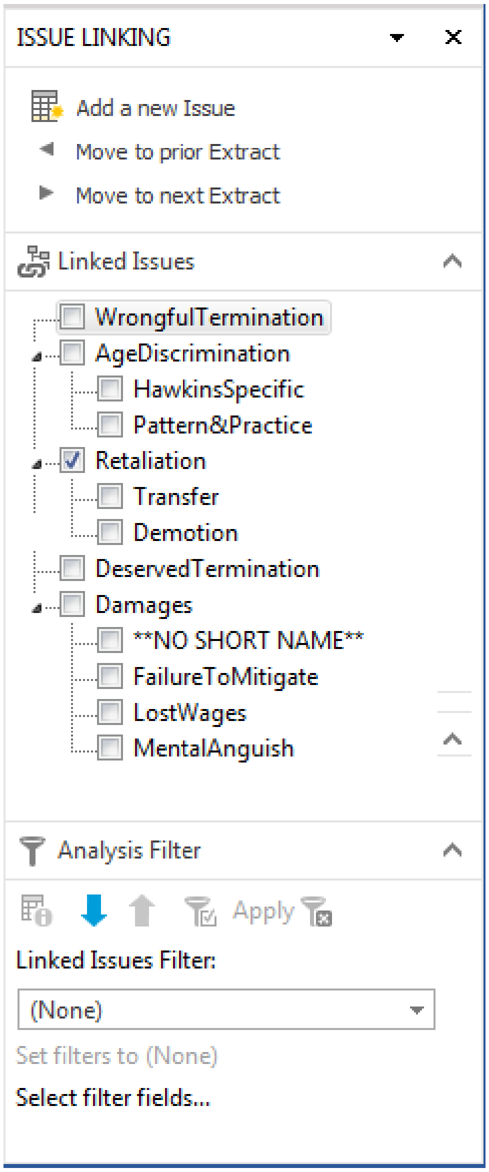
### ⊟ To link objects to facts, questions, research

When you enter object records, CaseMap is creating short names based off the full name entry for each object record. When you type using short names while entering fact, question, and research records you are automatically linking the object record with the current case record you are working in. As CaseMap recognizes a short name when it's typed in another spreadsheet record, the object name is automatically underlined in blue indicating a link to the object record.

For more information, see About short names, Entering facts, Entering questions, and Entering research.

### ⊟ To link objects to case issues

1. In the **Case Shortcuts** pane, click on the **All Objects** spreadsheet icon in the **Favorites** pane or a sub-level spreadsheet icon in the **All Shortcuts** pane.
2. Click on the **Issue Linking** button on the **Home** ribbon to open the **Linking Issues** pane.
3. In the **Linked Issues** pane, select check boxes for each issue that applies to the object record.


ISSUE LINKING
Add a new Issue
Move to prior Extract
Move to next Extract
Linked Issues
☐ WrongfulTermination
☐ AgeDiscrimination
☐ HawkinsSpecific
☐ Pattern&Practice
☑ Retaliation
☐ Transfer
☐ Demotion
☐ DeservedTermination
☐ Damages
☐ **NO SHORT NAME**
☐ FailureToMitigate
☐ LostWages
☐ MentalAnguish
Analysis Filter
Apply
Linked Issues Filter:
(None)
Set filters to (None)
Select filter fields...

Notice that you can use the Move to Next and Move to Prior buttons in the Issue Linking pane to navigate the records in the spreadsheet.

4. Click in the **Linked Issues** field for a fact to view all linked issues for this record.

5. Continue linking object records to case issues as needed.

   Data entered in spreadsheet cells is automatically saved as you navigate to a new cell or record.

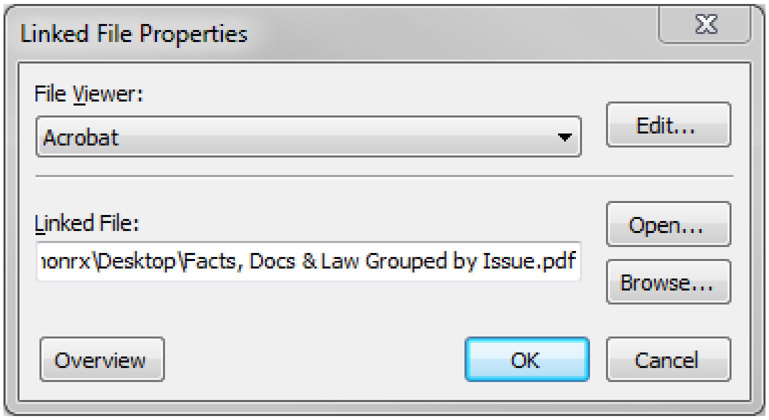
### ⊟ To link object records to source files

1. In the **Case Shortcuts** pane, click on the **All Objects** spreadsheet icon in the **Favorites** pane or a sub-level spreadsheet icon in the **All Shortcuts** pane.

2. Scroll to the far right of the spreadsheet to locate the **Linked File** field.

3. Click on the **Ellipsis** button in the **Linked File** cell for this record.

4. In the **Linked File Properties** box under **File Viewers**, click on the file viewer needed for opening the source file.



Linked File Properties

File Viewer: Acrobat

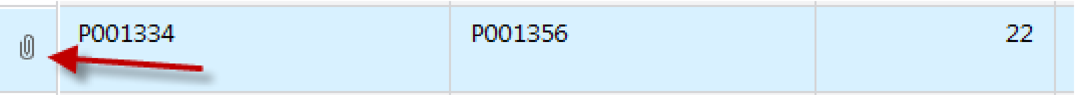
Linked File: ıonrx\Desktop\Facts, Docs & Law Grouped by Issue.pdf

5. Click the **Browse** button to navigate to the folder where this source file is stored and select it.

6. Click to **Open** and then **OK** to set the linked path to this source file.

   The file's directory path now displays in the Linked File field for this document record.

7. Scroll to the far left of the spreadsheet and notice that a paperclip icon now displays next the object record.



| | | |
|---|---|---|
| P001334 | P001356 | 22 |

8. Click on the paperclip icon to view the native file, directory path, and type of file that is linked to this record. You can also click on this link to view the source file in its original program.

> If the paperclip icon doesn't automatically display, click the Refresh toolbar button or click the New Record button. If you link to a native source file that isn't added to the CaseMap File Viewer settings, the paperclip and file path won't display until the program is added to the File Viewers dialog box accessible on the Case Tools > Linked Files > File Viewers submenu.

Related Topics

[About linking]()
[About analyzing data]()
[Objects spreadsheet field list]()

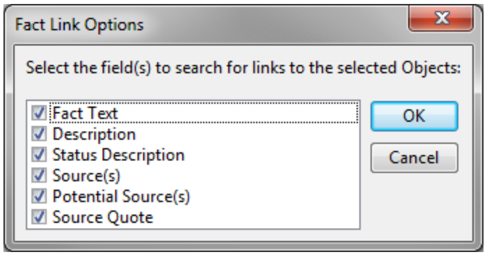
## Showing all facts linked to a set of objects

CaseMap allows you to quickly review how many fact records are linked to a set of objects by running a filter on selected fact records. The Facts Linked to Selected Objects utility lists fields for you to select that are linked to objects in the current spreadsheet view.

For example, you can filter your document index down to a set of documents authored by a particular person and then have CaseMap create a chronology of all of the facts sourced from these documents.

### To show all facts linked to a set of objects

1. On the **Case Tools** ribbon, under **Analyze**, click **Facts Linked to Selected Objects** on the submenu.
2. In the message box, click **OK**.
3. In the **Fact Link Options** box, select the check box for the fields in the Facts spreadsheet that you want to identify, then click **OK**.



Select the field(s) to search for links to the selected Objects:

- ☑ Fact Text
- ☑ Description
- ☑ Status Description
- ☑ Source(s)
- ☑ Potential Source(s)
- ☑ Source Quote

A Fact List dialog box now displays all fact records linked to the type of object spreadsheet currently in view (such as Persons).

You can print, save, or export information in the List dialog box, as needed.

Related Topics

[Analyzing and linking objects]

## Analyzing and linking questions

The Questions spreadsheet is used to track both questions about the case or upcoming depositions, as well as to enter and assign task items for staff to complete. To evaluate case progress and ensure you are meeting targeted deadlines, mark questions or tasks with a Criticality status and run searches to instantly review outstanding items. If you have a question about a document, you can attach that source file to the question record and assign it to a case user to research. You can also enter questions for witnesses and link the record to people in the Questions For field so you can print a report for an upcoming deposition.

Discuss with case staff the variety of ways you can use this spreadsheet to benefit case research and progress. This spreadsheet can be updated throughout the life of the case.

> Sort the Questions spreadsheet by Assigned To field status, then email a report of questions assigned to a case user so he or she can start working on the tasks.

***Primary fields used to track information include***: Question Text, Due Date, Assigned To, Answer, Answer Status, Question For, Linked Elements, and other similar field types.

***Primary fields used to analyze/categorize include***: Criticality, Linked Issues, Category, among others.

For more information on fields, see Questions spreadsheet field list.

### To analyze questions

1. In the **Case Shortcuts** pane, click on the **Questions** spreadsheet icon in the **All Shortcuts** pane.
2. Click on the record you want to analyze.
3. In the **Criticality** cell, click on the letter that best categorizes the importance of the question.
4. In the **Question For** cell, type in the short name of the person you want to ask a question.

> Not all fields may display in a spreadsheet's default view. Some may be hidden and can be inserted as needed. Right-click on a field title bar and click Insert Fields to select a field you want to add to the spreadsheet. Select the check box for the field you want to add and click OK.

5. In the **Linked Elements** cell, review the spreadsheet information and objects to which the question is linked.

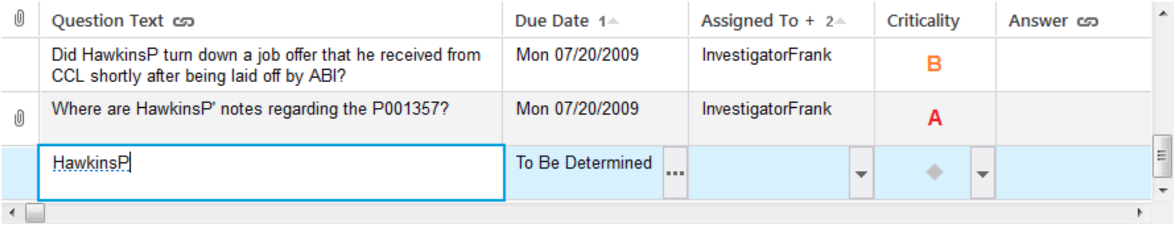
> The Linked Elements cell can help you make associations between the record the questions are linked to without having to navigate back and forth between spreadsheets.

6. In the **Category** cell, click on the type of case element the question is about.
7. Continue setting the status for fields as needed.

   Data entered in spreadsheet cells is automatically saved as you navigate to a new cell or record.

### 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.)



| Question Text | Due Date 1 | Assigned To + 2 | Criticality | Answer |
|---|---|---|---|---|
| Did HawkinsP turn down a job offer that he received from CCL shortly after being laid off by ABI? | Mon 07/20/2009 | InvestigatorFrank | B | |
| Where are HawkinsP' notes regarding the P001357? | Mon 07/20/2009 | InvestigatorFrank | A | |
| HawkinsP | To Be Determined | | | |

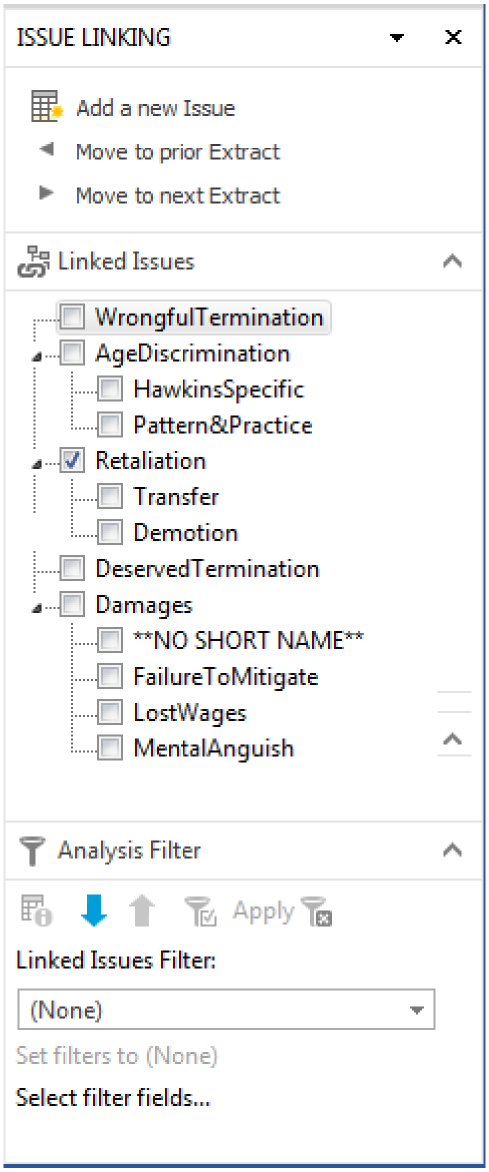
For more information, see Entering questions.

### To link questions to issues

1. In the **Questions** spreadsheet, click on the question record you want to link to an issue in the Issues spreadsheet.

2. Click on the **Issue Linking** button on the **Home** ribbon to open the **Linking Issues** pane.

3. In the **Linked Issues** pane, select check boxes for each issue that applies to the question record.


ISSUE LINKING
Add a new Issue
Move to prior Extract
Move to next Extract
Linked Issues
Analysis Filter
Apply
Set filters to (None)
Select filter fields...

- ☐ WrongfulTermination
- ☐ AgeDiscrimination
  - ☐ HawkinsSpecific
  - ☐ Pattern&Practice
- ☑ Retaliation
  - ☐ Transfer
  - ☐ Demotion
- ☐ DeservedTermination
- ☐ Damages
  - ☐ **NO SHORT NAME**
  - ☐ FailureToMitigate
  - ☐ LostWages
  - ☐ MentalAnguish

Linked Issues Filter: (None)

Notice that you can use the Move to Next and Move to Prior buttons in the Issue Linking pane to navigate the records in the spreadsheet.

4. Click in the **Linked Issues** field for a question to view all linked issues for this record.

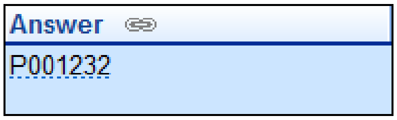
5. Continue linking question records to case issues as needed.

   Data entered in spreadsheet cells is automatically saved as you navigate to a new cell or record.

### ⊟ To link question records to source files

1. In the **Questions** spreadsheet, click on the question record you want to link to a source file.

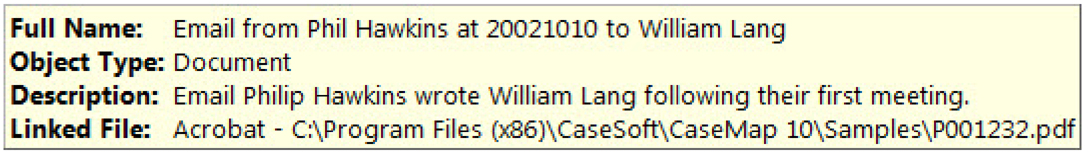
2. Click in the **Answer** field and type in the file's short name.



| Answer |
|---|
| P001232 |

The file is now linked to the question record by its short name.

Point to the short name link to view the file information, including the file's full name, object type, description and file path.

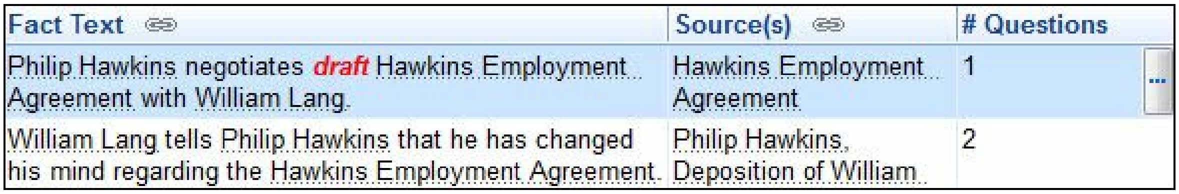


| | |
|---|---|
| **Full Name:** | Email from Phil Hawkins at 20021010 to William Lang |
| **Object Type:** | Document |
| **Description:** | Email Philip Hawkins wrote William Lang following their first meeting. |
| **Linked File:** | Acrobat - C:\Program Files (x86)\CaseSoft\CaseMap 10\Samples\P001232.pdf |

### To use the Question button to link to facts, documents, and people, etc.

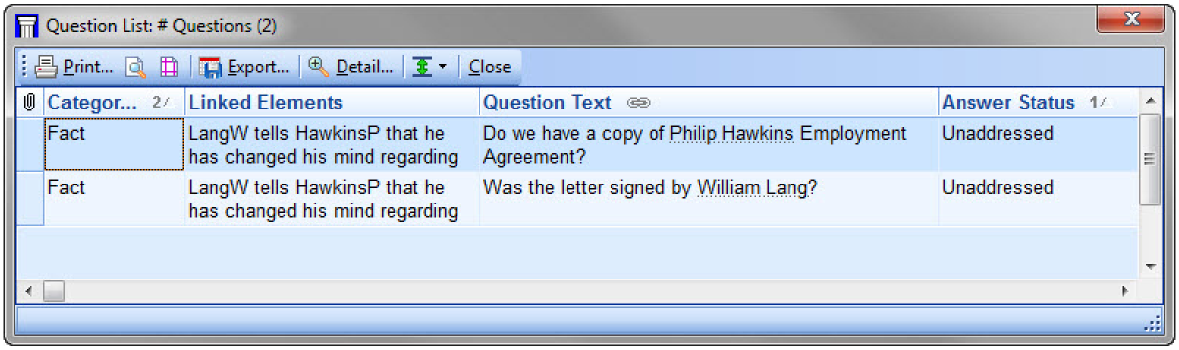
If you are linking question records to other spreadsheet records frequently, you may want to add the Question button to the CaseMap Quick Access Toolbar for easy access.

For example, clicking the Add Question button from the Facts spreadsheets displays the Questions Detail dialog box where you can type in a new question record without having to leave the Facts spreadsheet. If you also insert the # Questions field into the Facts spreadsheet then the number of linked questions displays for that record.



| Fact Text | Source(s) | # Questions |
|---|---|---|
| Philip Hawkins negotiates *draft* Hawkins Employment Agreement with William Lang. | Hawkins Employment Agreement | 1 |
| William Lang tells Philip Hawkins that he has changed his mind regarding the Hawkins Employment Agreement. | Philip Hawkins, Deposition of William | 2 |

In the # Questions cell, click the Ellipsis button to display a list box with all linked questions for that record. You can also print the question list as a hard copy or save it as a PDF.

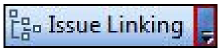


| Categor... | Linked Elements | Question Text | Answer Status |
|---|---|---|---|
| Fact | LangW tells HawkinsP that he has changed his mind regarding | Do we have a copy of Philip Hawkins Employment Agreement? | Unaddressed |
| Fact | LangW tells HawkinsP that he has changed his mind regarding | Was the letter signed by William Lang? | Unaddressed |

> You can also click on the Insert menu and then click Add Question from the spreadsheet where you want to link a record and enter a new question.

1. Click on the spreadsheet you want to use, such as the **Facts**, **Documents**, or **Persons** spreadsheet.

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 to the selection.

   The Add Question button now displays on the toolbar to the left of the Filter button.

Related Topics

[About linking]
[About analyzing data]
[Questions spreadsheet field list]

## Analyzing and linking research

Once you have added research to the case, you then need to set the status for record fields and link records to issues.

***Primary fields used to track information include***: Name, Description, Linked File, # Extracts, Extract Text, Date Verified, and other similar field types.

***Primary fields used to analyze/categorize include***: Jurisdiction, Type, Criticality, Linked Issues, among others.

For more information on fields, see Research spreadsheets field list.

> You can analyze and link data from the Research - Authorities and Extracts spreadsheet too. The procedures are similar to those noted below. Remember that not all fields may display in spreadsheet view. Some may be hidden and can be inserted as needed.

### ⊟ To analyze research in the Research - Authorities spreadsheet

1. In the **Case Shortcuts** pane, click on the **Research - Authorities** spreadsheet icon in the **All Shortcuts** pane.
2. Click on the record you want to analyze.
3. In the **Jurisdiction** cell, click or type the court from which the precedent came from.

4. In the **Type** cell, click the type of authority for the record.

5. In the **Criticality** cell, click on the letter that best categorizes the importance of the authority.

> Not all fields may display in a spreadsheet's default view. Some may be hidden and can be inserted as needed. Right-click on a field title bar and click Insert Fields to select a field you want to add to the spreadsheet. Select the check box for the field you want to add and click OK.

6. Continue setting the status for fields as needed.

   Data entered in spreadsheet cells is automatically saved as you navigate to a new cell or record.

### To analyze research in the Research - Extracts from Authorities spreadsheet

1. In the **Case Shortcuts** pane, click on the **Research - Extract from Authorities** spreadsheet icon in the **All Shortcuts** pane.

2. Click on the record you want to analyze.

3. In the **Criticality** cell, click on the letter that best categorizes the importance of the authority.

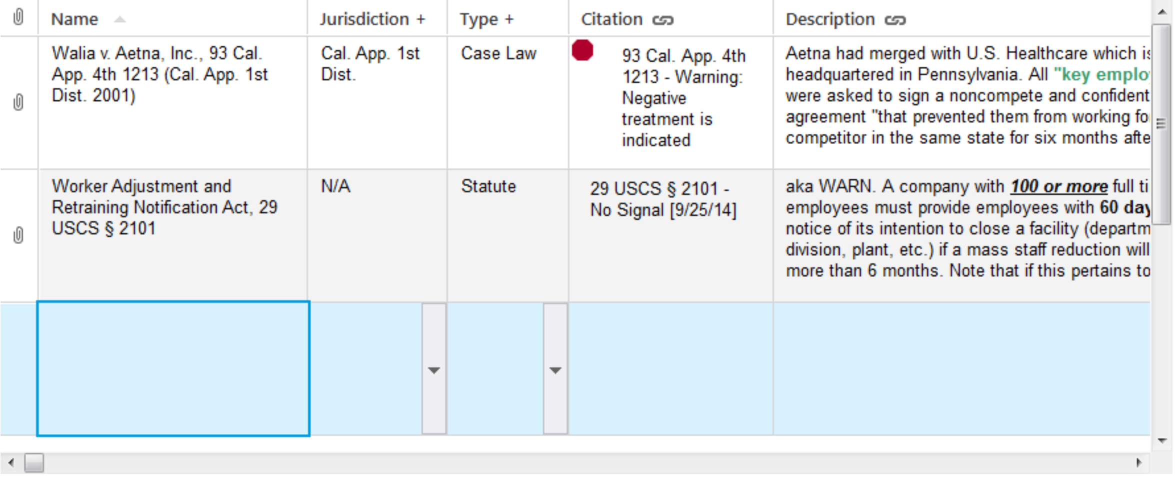
4. Continue setting the status for fields as needed.

   Remember that not all fields may display in spreadsheet view. Some may be hidden and can be inserted as needed.

   Data entered in spreadsheet cells is automatically saved as you navigate to a new cell or record.

### To link research to objects

When you enter authority and extract records, you should type using short names in fields (Notes field) where you want to automatically link the records with an object (person, organization, etc.).



| Name | Jurisdiction + | Type + | Citation | Description |
|---|---|---|---|---|
| Walia v. Aetna, Inc., 93 Cal. App. 4th 1213 (Cal. App. 1st Dist. 2001) | Cal. App. 1st Dist. | Case Law | 93 Cal. App. 4th 1213 - Warning: Negative treatment is indicated | Aetna had merged with U.S. Healthcare which i headquartered in Pennsylvania. All "key emplo were asked to sign a noncompete and confident agreement "that prevented them from working fo competitor in the same state for six months afte |
| Worker Adjustment and Retraining Notification Act, 29 USCS § 2101 | N/A | Statute | 29 USCS § 2101 - No Signal [9/25/14] | aka WARN. A company with ***100 or more*** full ti employees must provide employees with **60 day** notice of its intention to close a facility (departm division, plant, etc.) if a mass staff reduction will more than 6 months. Note that if this pertains to |
|  |  |  |  |  |

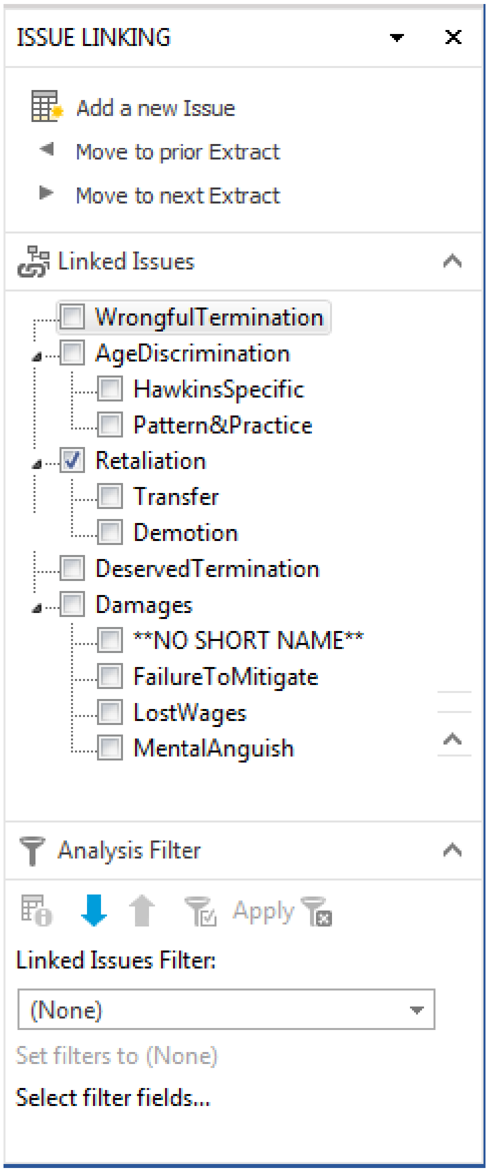
For more information, see Entering research.

### To link authorities and extracts to issues

1. In the **Authorities** or **Extracts from Authorities** spreadsheets, click on the authority or extract record you want to link to an issue in the Issues spreadsheet.

2. Click on the **Issue Linking** button on the **Home** ribbon to open the **Linking Issues** pane.

3. In the **Linked Issues** pane, select check boxes for each issue that applies to the authority or extract record.


ISSUE LINKING
Add a new Issue
Move to prior Extract
Move to next Extract
Linked Issues
☐ WrongfulTermination
☐ AgeDiscrimination
☐ HawkinsSpecific
☐ Pattern&Practice
☑ Retaliation
☐ Transfer
☐ Demotion
☐ DeservedTermination
☐ Damages
☐ **NO SHORT NAME**
☐ FailureToMitigate
☐ LostWages
☐ MentalAnguish
Analysis Filter
Apply
Linked Issues Filter:
(None)
Set filters to (None)
Select filter fields...

Notice that you can use the Move to Next and Move to Prior buttons in the Issue Linking pane to navigate the records in the spreadsheet.

4. Click in the **Linked Issues** field for a authority or extract to view all linked issues for the

record.

5. Continue linking authority or extract records to case issues as needed.

   Data entered in spreadsheet cells is automatically saved as you navigate to a new cell or record.

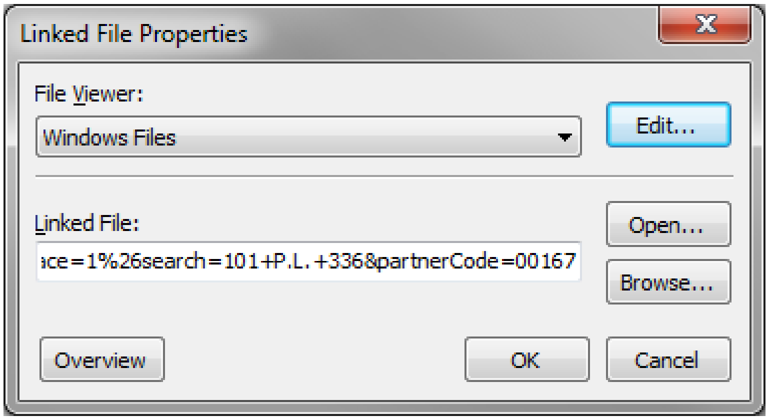
### ⊟ To link to authority and extract records to source files

1. In the **Authorities** or **Extracts from Authorities** spreadsheet, click on the document record you want to link to a source file.

2. Scroll to the far right of the spreadsheet to locate the **Linked File** field.

3. Click on the **Ellipsis** button in the **Linked File** cell for this record.

4. In the **Linked File Properties** box under **File Viewers**, click on the file viewer needed for opening the source file.



File Viewer: Windows Files

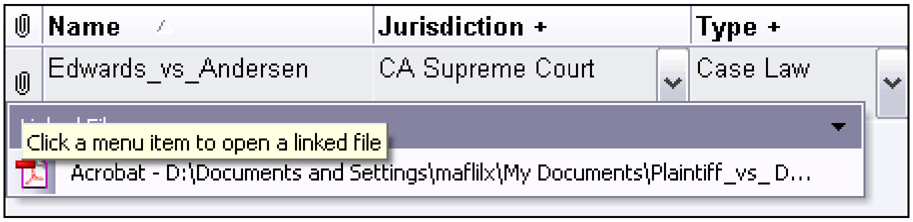
Linked File: ıce=1%26search=101+P.L.+336&partnerCode=00167

5. Click the **Browse** button to navigate to the folder where this source file is stored and select it.

6. Click to **Open** and then **OK** to set the linked path to this source file.

   The file's directory path now displays in the Linked File field for this authority or extract record.

7. Scroll to the far left of the spreadsheet and notice that a paperclip icon now displays next the authority or extract record.



| | Name | Jurisdiction + | Type + |
|---|---|---|---|
| | Edwards_vs_Andersen | CA Supreme Court | Case Law |

Acrobat - D:\Documents and Settings\maflilx\My Documents\Plaintiff_vs_D...

8. Click on the paperclip icon to view the native file, directory path, and type of file that is linked to this record. You can also double-click on the paperclip icon to view the source file in its native program.

> If the paperclip icon doesn't automatically display, click the Refresh button on the Quick Access Toolbar or click the New Record button. If you link to a native source file that isn't added to the CaseMap File Viewer settings, the paperclip and file path won't display until the program is added to the File Viewer dialog box accessible on the Case Tools > Linked Files > File Viewers submenu.

For more information, see Adding/changing file viewers.

### ⊟ To locate a linked authority

1. In the **Authorities** spreadsheet, click on the research record for which you want to locate the source file at Lexis Advance.

   This feature does not locate source authorities that are saved to PDF files. To open a linked native source file, click on the paperclip icon to the far left of the research record.

2. On the **Home** ribbon, click on the **Research Authority** button and then click **Get this document**.

3. Sign in to Lexis Advance and the document should display.

> If the document does not display, it's likely that the hyperlink to the authority has been broken. We recommend that you save all case law research to an Adobe Acrobat PDF file and then link to the source file stored in a Research folder on your network.

**Related Topics**

About linking
About analyzing data
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 analysis. Access to LexisNexis online research depends on whether you have subscribed to these services.

***LexisNexis online research options include:***

- Lexis Advance
- CourtLink
- LexisNexis Analyzer
- LexisNexis Dossier Suite

- LexisNexis Expert Research On-Demand
- Shepard's Citations Service
- Martindale-Hubbell

In CaseMap, these features access Internet web sites. You must have access to the Internet to use these features. Click on the links above to learn more about each product or service, or contact your CaseMap account representative at 866-316-8525.

## Access research tools from specific spreadsheets

***Research menus are available on the following spreadsheets:***

- All Objects
- Persons
- Organizations
- Issues
- Research - Authorities
- Research - Authorities and Extracts

***Research menus are accessible in two places for the same record:***

- Full Name field and clicking the drop-down menu
- Home ribbon and clicking on the 'Research' button for the current spreadsheet (e.g., Research Authority button )

The same menu is accessed from both locations. Research menus differ depending on which type of case record you are working on. For example, the Research menu options for the Authorities spreadsheet are different than those for the Organizations spreadsheet.

On the Persons spreadsheet you have different Research menus and options depending on the type of person your entry in the Type+ field and the case record selection. For example, Type+ field entries may categorize the person as a Fact Witness, Expert Witness, Attorney, Judge, Arbitrator, and Mediator.

The Type+ field entry will trigger CaseMap to offer the appropriate menu selections for your online search — as long as you include the keywords "expert", "attorney", "counsel", "lawyer", "judge", "arbitrator", or "mediator". For example, "Expert Witness" and "Ballistics Expert" both indicate an expert type. "CoCounsel" and "Opposing Counsel" both indicate an attorney type.

## View the online research options

Reference the following table to learn what online research options you can perform.

**Online Research Options**

| Button and Menu Items | Description |
|---|---|
| **Research Persons**<br>**(Fact Witness)** | Run a Public Records Search<br>Run a Litigation Profile Report<br>Search Dockets & Documents |
| **Research Persons**<br>**(Expert Witness)** | Run a Public Records Search<br>Request a Testimonial History Report<br>Run a Litigation Profile Report<br>Run an Expert Witness Analyzer Report<br>Search Dockets & Documents |
| **Research Persons**<br>**(Opposing Counsel)** | Find on martindale.com<br>Run an Attorney Litigation Profile Report<br>Run an Attorney Analyzer Report<br>Search Dockets & Documents |
| **Research Persons**<br>**(Judge)** | Run a Judge Analyzer Report<br>Run a Judicial Litigation Profile Report<br>Search Dockets & Documents |
| **Research Organizations** | Run a Public Records Search<br>Run a Company Dossier Report<br>Run a Litigation Profile Report<br>Search Dockets & Documents |
| **Research Authority** | Get this document<br>Shepardize |

## Support Contacts for LexisNexis Research

LexisNexis provides toll-free 24/7 customer support centers for all LexisNexis online research products and services. Please use the numbers and/or email addresses below for all questions about online research.

**Online Research Support Contact Numbers**

| Product/Service | Phone Number |
|---|---|
| Lexis Advance | 1-800-543-6862 |
| LexisNexis Analyzer | 1-800-543-6862 |
| LexisNexis Dossier | 1-800-543-6862 |
| CourtLink | 1-888-311-1966 |
| Shepard's Citations, Signals, and Alerts | 1-800-543-6862 |
| LexisNexis Expert Research On-Demand | 1-800-521-5596 |
| Martindale-Hubbell | 1-800-526-4902 |

If your question concerns CaseMap or the Send to CaseMap feature using Internet Explorer, contact CaseMap Support at 800-833-3346, option 3) or casemap.support@lexisnexis.com. Hours for live CaseMap Support are 9:00 AM to 7:00 PM, Eastern Time, Monday-Friday.

Related Topics

Using online research tools
Changing research settings
About Shepard's Signals
Using Shepard's Signals

## Using online research tools

Integration with LexisNexis online content allows you to easily perform context-specific searches for people, organizations, issues, and case law.

***Research menus are available on the following spreadsheets:***

- All Objects — Research button
- Persons — Research Persons button
- Organizations — Research Organizations button
- Research - Authorities — Research Authority button

- Research - Authorities and Extracts — Research button

***Research menus are accessible in two places for the same record:***

- Full Name field by clicking the drop-down menu 🔍▾
- Home ribbon and clicking on the 'Research' button for the current spreadsheet (e.g., Research Authority button 🔍)

The same menu is accessed from both locations. Research menus differ depending on which type of case record you are working on. For example, the Research menu options for the Authorities spreadsheet are different than those for the Organizations spreadsheet.

## To research objects online

1. In the **Case Shortcuts** pane, click the icon for the spreadsheet you want to use.

   You must open the All Objects, Persons, Organizations, Research - Authorities, or Research - Authorities and Extracts spreadsheet to use this feature.

2. On the **Home** ribbon, click **New Record**, and then select the applicable spreadsheet type (e.g., Persons).

   You can also select the applicable spreadsheet type from the **Case Shortcuts** pane.

3. On each of these menus, select the research item you want to perform.

   **Research options for Expert Witness**

   Run a Public Records Search

   Request a Testimonial History Report

   Run an Expert Witness Analyzer Report

   **Research options for Fact Witness**

   Run a Public Records Search

   **Research options for Judge**

   Run a Judge Analyzer Report

   **Research options for Opposing Counsel**

   Run an Attorney Analyzer Report

   **Research options for Organizations**

   Run a Public Records Search

   Run a Company Dossier Report

4. In the message box, click **OK**.
5. Log on to your LexisNexis account for the program you are accessing.
6. Refer to your LexisNexis documentation for further instructions on completing these steps.

### To search Dockets & Documents

1. In the **Case Shortcuts** pane, under **All Shortcuts**, click the icon for the **Persons** or the **Organizations** spreadsheet.

> Docket & Document searches can be performed from either the Persons or the Organizations spreadsheets.

2. In the **Persons** or the **Organizations** spreadsheet, click in the **Full Name** field of the selected record, and then click the drop-down menu button.
3. From the menu, select **Search Dockets & Documents**.

   You can also select All Objects under Case Shortcuts, and then click **Search Dockets & Documents**.
4. In the message box, click **OK**.

> You will be prompted to enter your ID and password if you are not already logged in.

### To run a Litigation Profile report

1. In the **Case Shortcuts** pane, under **All Shortcuts**, click the icon for the **Persons** or the **Organizations** spreadsheet.

> Litigation Profile reports can be run from either the Persons or the Organizations spreadsheets.

2. In the **Persons** or the **Organizations** spreadsheet, click in the **Full Name** field of the selected record, and then click the drop-down menu button.
3. From the menu, select **Run a Litigation Profile Report**.

   You can also select All Objects under Case Shortcuts, and then click Run a Litigation Profile Report.

   Click **Run a Judicial Litigation Profile Report** for Judge or click **Run an Attorney Litigation Profile Report** for Opposing Counsel.
4. In the message box, click **OK**.
5. In the **Litigation Profile Report Assistant, Judicial Litigation Profile Report**, or **Assistant Attorney Litigation Profile Report Assistant** dialog box, verify the information, and click **OK**.

You will be prompted to enter you ID and password if you are not already logged in.

### ⊟ To view linked research

1. In the **Case Shortcuts** pane, click the icon for the **Authorities** spreadsheet.
2. In the **Authorities spreadsheet**, click in the **Name** field of the appropriate record, and then click the drop-down menu 🔍▾ button.
3. From the drop-down menu, click **Get this document**.

You will be prompted to enter you ID and password if you are not already logged in.

The Get a Document - by Citation page displays.

### ⊟ To hide online research options

You can turn off or hide the research menus or drop-down options for records in your case.

For more information, see Changing research settings.

Related Topics

- About online research
- About research
- Analyzing and linking objects
- About Shepard's Signals
- Using Shepard's Signals
- Changing research settings

## Using martindale.com

CaseMap integrates with the martindale.com Service, a service that provides a comprehensive search for additional attorney insight.

The CaseMap integration with the Martindale Hubbell Lookup automates a web search from the CaseMap's Persons spreadsheet and provides the option to research Opposing Counsel.

### ⊟ To find an attorney on martindale.com

1. In the **Case Shortcuts** pane, click the icon for the **Persons** spreadsheet.
2. In the **Persons** spreadsheet, click in the **Name** field of the appropriate record for Opposing Counsel, and then click the drop-down menu 🔍▾ button.

3. From the drop-down menu, click **Find on martindale.com**.

   The search results appear for the Attorney on the Martindale.com web page.

## Using Shepard's Signals

### ***About Shepard's Signals***

CaseMap integrates with the Shepard's Citations Service, a LexisNexis service that provides a comprehensive case citation and treatment history to verify the validity of case law, statutes, agency opinions, and other legal documents.

CaseMap's Research - Authorities spreadsheets provide an automatic look-up for Shepard's signals for case law citations when a case is opened. The Shepard's signal status displays for each case law citation in the Authorities spreadsheet.

### ⊟ Learn more about Shepard's Citations Service

Shepardizing™ is the practice of using the Sherpard's Citations Service to validate a citation.

When you Shepardize® a case, LexisNexis provides a report showing every opinion where that case has been referenced, all treatments of the case, and whether the case is "good law". If the case has been overruled, it is considered "bad law" and may no longer be cited as a legal precedent.

To learn more about Shepard's Citations Service, visit www.lexisnexis.com or contact your LexisNexis Sales Representative.

### ⊟ Learn the Shepard's Signal icons

The following table provides the icons and descriptions for Shepard's Signals in CaseMap. These indicate the status of your case or statute as treated by other cases (your Cited Case or Cited Statute).

<table>
<tr><th colspan="2">Shepard's Signals</th></tr>
<tr><th>Signal</th><th>Description</th></tr>
<tr><td>🛑</td><td>Warning. Negative treatment indicated.<br>Includes the following analyses: Overruled by, Superceded by, Revoked, Obsolete, Rescinded</td></tr>
<tr><td>❗</td><td>Warning: Negative case treatment is indicated for statue.<br>Includes the following analyses: Unconstitutional, Void, Invalid</td></tr>
</table>

**Shepard's Signals**

| Signal | Description |
|---|---|
| Q | Questioned: Validity questioned by citing references.<br>Includes the analysis: Questioned by |
| ▲ | Caution: Possible negative treatment indicated.<br>Includes the following analyses: Limited, Criticized by, Clarified, Modified, Corrected |
| ✚ | Positive: Positive treatment indicated.<br>Includes the following analyses: Followed, Affirmed, Approved |
| A | Citing References with Analyses: Other cases cited the case and assigned some analysis that is not considered positive or negative. |
| I | Citation Information: References have not applied any analysis to the citation. For example, the case was cited by case law or law reviews that do not warrant an analysis.<br>Includes the analysis: Cited by |

Related Topics

- About research
- Entering research
- Researching objects online
- Using Shepard's Signals

### *Using Shepard's Signals*

When using the Shepard's Citation Service, you first must set up Shepard's Alerts. Once they are setup for the Citation field in the Authorities spreadsheet, you can then validate authority records in the case. Settings for how the Shepard's signs display in the Citation field can be adjusted to your user preference.

⊟ **To set up a Shepard's Alert**

1. In the **Case Shortcuts** pane, click on the **Authorities** spreadsheet icon in the **All Shortcuts** pane.
2. On the **Home** ribbon, click the **Research Authority** button and then click **Set up a Shepard's Alert**.
3. In the message box, click **OK**.

📝 You will be prompted to enter you ID and password if you are not already logged in.

### ⊟ To Shepardize authorities

1. In the **Case Shortcuts** pane, click on the **Authorities** spreadsheet in the **All Shortcuts** pane.
2. Select the case record you want to validate.
3. On the **Home** ribbon, click the **Research Authority** button, and then click **Shepardize**.

📝 You will be prompted to enter you ID and password if you are not already logged in.

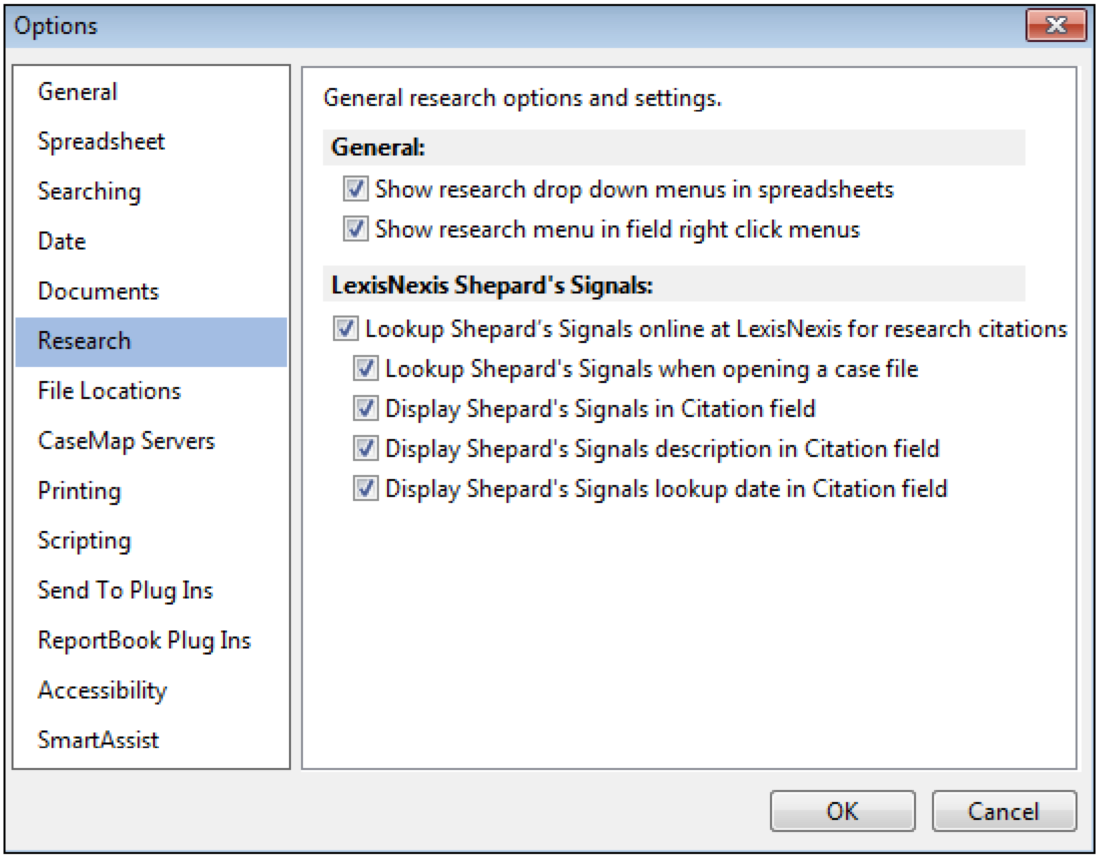
The Shepard's report is generated from the research citation.

### ⊟ To update all Shepard's Signals

1. In the **Case Shortcuts** pane, click on the **Authorities** spreadsheet in the **All Shortcuts** pane.
2. On the **Case Tools** ribbon, click **Update Records**, and then click **Update Shepard's Signals**.
3. In the message box to confirm that all authorities are updated, click **OK**.

### ⊟ To change Shepard's Signals settings

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click on the **Research** tab.
3. In the **LexisNexis Shepard's Signals** area, select or clear the Citation field settings you want.


Options
General
Spreadsheet
Searching
Date
Documents
Research
File Locations
CaseMap Servers
Printing
Scripting
Send To Plug Ins
ReportBook Plug Ins
Accessibility
SmartAssist
OK
Cancel

General research options and settings.

**General:**

☑ Show research drop down menus in spreadsheets
☑ Show research menu in field right click menus

**LexisNexis Shepard's Signals:**

☑ Lookup Shepard's Signals online at LexisNexis for research citations
- ☑ Lookup Shepard's Signals when opening a case file
- ☑ Display Shepard's Signals in Citation field
- ☑ Display Shepard's Signals description in Citation field
- ☑ Display Shepard's Signals lookup date in Citation field

4. Click **OK** to save the settings.

Related Topics

[About Shepard's Signals](#)
[About research](#)
[Entering research](#)

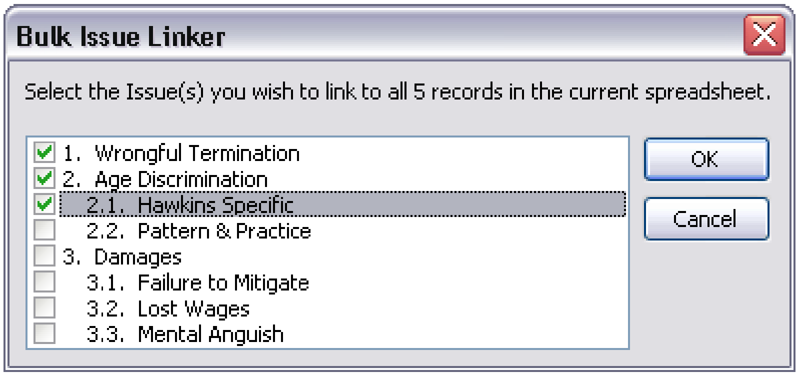
## Using the Bulk Issue Linker

The Bulk Issue Linker tool allows you to link all records in a spreadsheet view to one or more issues at one time, as opposed to linking individual case records to one or more issues as you analyze records. This tool is useful when you sort a spreadsheet to view only those records you want to link to a particular issue. Then you can run the utility to link all spreadsheet records in view to one or more issues of your choosing.

⚠ We recommend that you make a backup copy of the case before making any global changes, like linking multiple records at one time. Restoring a backup copy is the only way to undo global changes to case data.

### ⊟ To use the Bulk Issue Linker

1. In the **Case Shortcuts** pane, click on the spreadsheet icon you need.
2. Perform search filters and/or sort the spreadsheet to contain only those records you want to link to a set of issues.
3. On the **Case Tools** ribbon, click the **Update Records** button, and then click **Bulk Issue Linker** on the submenu.
4. In the message box, click **OK**.
5. In the **Bulk Issue Linker** box, click on the check boxes for the issue(s) you want to link to the records displayed in the spreadsheet.


Bulk Issue Linker

Select the Issue(s) you wish to link to all 5 records in the current spreadsheet.

☑ 1. Wrongful Termination
☑ 2. Age Discrimination
☑ 2.1. Hawkins Specific
☐ 2.2. Pattern & Practice
☐ 3. Damages
☐ 3.1. Failure to Mitigate
☐ 3.2. Lost Wages
☐ 3.3. Mental Anguish

6. Click **OK** to link the records to selected issues.
7. In the message box to confirm the linking, click **Yes**.
8. In the confirmation box, click **OK**.

   All records in the spreadsheet should now display all selected links in the Linked Issues cells for each record.

   Notice that the # Issues cell also displays the number of links for each case record.

Related Topics

About linking

## Linking related files

The Related File field is included on each spreadsheet and is only used in rare instances when it's deemed absolutely necessary to have additional files linked to a record.

You can link to various file types: Adobe® Acrobat, Microsoft® Word and Excel, audio, video, graphics, images, etc. You can link to files stored on your computer. However, other users cannot view these files unless they are stored in a network folder. If clients or remote staff need to view the files, you will need to send the files along with a replica copy of the case.

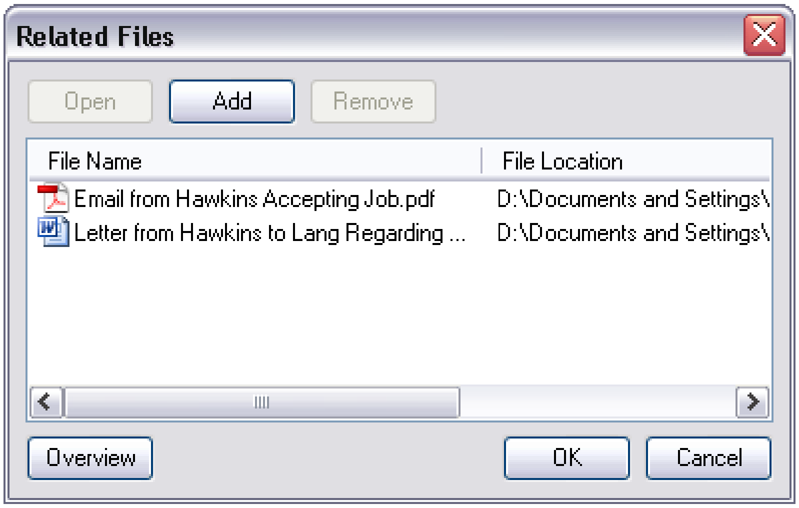
We strongly recommend you use the Linked File field in object and research spreadsheets to link a source file to a case record. In the Questions spreadsheet, use the Answer field to link a file to a case record. The Linked File field is most commonly used to link to important sources files that you want included in searches and reports, and linked to other spreadsheets by use of the file's short name.

⚠ Files added to this field through the Related Files dialog box have to be individually re-linked if the files are moved. Files linked to this field will not be included in search results or reports. Related files will not be linked to other spreadsheets.

When files are linked to a case record a paperclip icon displays to the far left of the record in the spreadsheet. Click on the paperclip icon to view the source file in its native application. You must have the native application installed on your computer to view the linked file.

### To link to a related file

1. In the **Case Shortcuts** pane, click on the icon for the spreadsheet you want to use.
2. Click on the record you want to link to a file.
3. Insert the **Related File** field into the spreadsheet if it is hidden from view.
4. Click on the **Ellipsis** button in the **Related Files** field for this record.
5. In the **Related Files** box, click the **Add** button.



| File Name | File Location |
|---|---|
| Email from Hawkins Accepting Job.pdf | D:\Documents and Settings\ |
| Letter from Hawkins to Lang Regarding ... | D:\Documents and Settings\ |

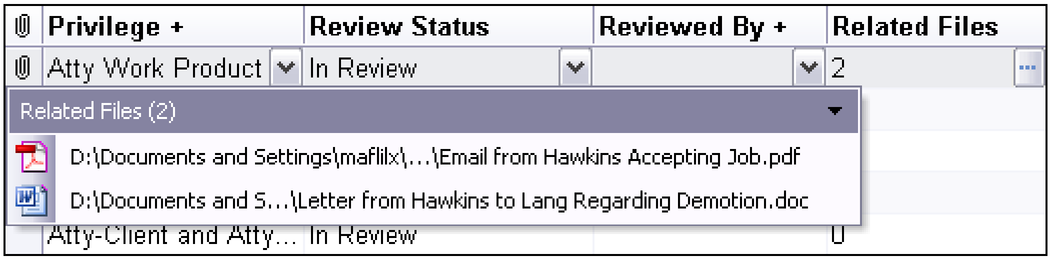
6. In the **Select file to add** box, navigate to the folder where the file is stored, then click **Open**.

The file now displays in the Related Files list.

7. Click **Add** to attach additional files.
8. Click **OK** to attach the files to the case record.

   The Related File field now displays the number of records you attached to the case record.

9. Click on the paperclip icon to the far left of the case record to view the file path and type of files.



Privilege + | Review Status | Reviewed By + | Related Files

Atty Work Product | In Review | | 2

Related Files (2)

D:\Documents and Settings\maflilx\...\Email from Hawkins Accepting Job.pdf

D:\Documents and S...\Letter from Hawkins to Lang Regarding Demotion.doc

Atty-Client and Atty... | In Review | | 0

10. Click on a link to open the file in its native application.

Related Topics

About linking

## Breaking links

If you need to break a link between two case elements, first determine whether you are breaking an issue link or a link between one or more elements (such as facts and objects).

⚠ Use caution before breaking a link between case elements. Once a link is broken, it is permanently removed from the case. To re-establish the link, you must reset it manually.

### To break an issue link

It's easy to break an issue link using the Issue Linking pane. Open the Issue Linking pane, select the record in the active spreadsheet and clear the check box for the issue you want to remove. The link is automatically removed for this case record.

### To break a link between facts and objects

To break a link between an object and a fact, select the record in the Facts spreadsheet and delete the object short name from the Fact Text field or other description fields.

### To break a link between questions and objects

To break a link between an object and a question, select the record in the Questions spreadsheet and delete the object short name from the Question Text field or other description fields.

### To break a link between research extracts and objects

To break a link between a research extract and an object, select the record in the Research - Extracts from Authorities spreadsheet and delete the object short name from the Extract Text field or other description fields.

Related Topics

About linking

# Case Evaluation

## Case evaluation overview

Case evaluation is the process of gathering and analyzing case information to infer the relative strength and weakness of a case. Its purpose is to help to inform strategy and to manage risk. There are many ways to perform case analysis. This topic highlights tools and workflows for case analysis that CaseMap provides.

### Review the issues

When evaluating a CaseMap case, the first place to start is the Issues spreadsheet.

1. Under CASE SHORTCUTS, select the **Issues** spreadsheet.

   This is where the legal issues represented in the case are outlined. Facts and other case information may be linked to issues. In this way, issues provide a structure for analyzing your case and for identifying its strengths and any weakness.

2. Start by asking these questions:

- Have issues been added? Adding issues is a best practice because it enables the case analysis and evaluation features of CaseMap.
- f issues have been added, do they seem to reflect what the case is about? Issues may be edited any time. If the issues for a case do not map to current legal practices or to the case specifics, they may be edited.
- How well are the issues organized? Issues be organized as a flat list or if they may form a hierarchy. Open the Hawkins example case to see an example of a hierarchical list. To open the case, on the FILE tab, click **Open Case**, and then click **Hawkins v. Anstar**.
- Have any issues been marked as Important? Cases are often composed of a mix of important issues and less important ones. For this reason, an issue can be marked as Important when you want it to become visible in CaseMap's assessment tools, especially in the CaseMap Fact Dashboard.

For more information on working with issues, see: About issues.

## ⊟ Check case metrics

After you have made sure the case issues fit the case and that at least some are marked as Important, it is time to check some basic case metrics.

1. On the HOME tab, click **Facts Dashboard**.

2. Review the basic statistics at the bottom of the dashboard.

- WINNING ISSUES. Are there any problematic Shepard's Signals listed under WINNING ISSUES? Signals are generated automatically for research cited in the Research spreadsheets. Ideally, the count for green issues should be relatively high and the counts for other colors should be zero. If the dashboard is showing counts for any non-green signals, you should check their sources by opening the Research spreadsheets. More research may be necessary to replace citations with negative Shepard's Signals.

  To open the Research spreadsheets, in the CASE SHORTCUTS area, expand **All Shortcuts**, expand **Research**, then click on the spreadsheet links.

- WINNING FACTS. This metric is composed of two numbers. The upper number tells you how many winning facts the case contains. A winning fact is one that has been marked as substantiated, material, and undisputed. Compare this number against the lower number, which is the total number of facts in the case. This comparison can give you a clue as to whether more analysis needs to be done on the case, and if much good quality analysis is already completed, where the case may be headed.
- TOTAL DOCUMENTS, TOTAL PEOPLE, and TOTAL QUESTIONS. Watch for numbers that seem low given the type of case and its complexity. Low numbers may simply mean the case is new, or they may suggest a case that is under-developed.

  These are the most basic case statistics to check when first evaluating a case. For more information on using the Fact Dashboard see, Fact Dashboard.

## ⊟ Prerequisites for advanced case assessment

Advanced case assessment is the practice of evaluating the strength of important issues in a case. Important issues may be evaluated by examining the quantity and quality of facts that are linked to them. CaseMap provides the Fact Dashboard with its donut and bar charts for this purpose. However, before using these tools, certain prerequisites in the form of case configuration and fact analysis is required:

Case configuration prerequisites:

- Issues are identified. Some are marked as Important. These steps are completed by using the Issues spreadsheet. For more information on creating and configuring issues, see: Entering issues.
- One or more Evaluation fields have been added to the Facts spreadsheet. For more information on adding Evaluation fields, see: Evaluation fields.

Fact analysis prerequisites:

- Facts are identified.
- Facts are linked to important issues.
- Facts are evaluated.

In an ideal world, facts are identified in source documents, linked to important issues, and evaluated in the same operation. Although it is technically possible to link facts to issues and evaluate them when sending them to CaseMap, this is not always practical or desirable. Sometimes it may be preferable or necessary to separate fact generation from categorization and evaluation. Given this reality, the Fact Cards provides a way to easily find unevaluated and unlinked facts, and then to evaluate or categorize them as needed. For more information on using Fact Cards, see: Fact Cards for issues and evaluations.

### Monitoring case activity

CaseMap provides tools for finding out who has worked on the case, how much work has been done, and how recently the case has been worked on.

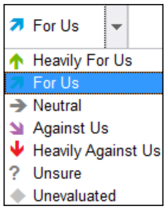
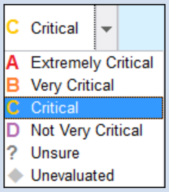
For more information on finding out who has worked on the case, see: Reviewing use history.

For more information on finding out how much recent work has been done on a case, see: Fact Dashboard.

- To run a report on what new in the past two weeks, on the REPORTS tab, click **ReportBooks**, click **What's New in the Last 14 Days**, and then click **Preview**.

## Evaluation fields

An evaluation field is a fixed-list type of CaseMap field that staff can use to assign assessment scores to facts, questions, research and other types of information. Evaluation fields can be used in several spreadsheets, as described in the following table:

| This spreadsheet: | Uses this type of evaluation field: | How to add: |
|---|---|---|
| Facts<br>All Objects<br>Issues<br>Research |  For Us<br>Heavily For Us<br>For Us<br>Neutral<br>Against Us<br>Heavily Against Us<br>Unsure<br>Unevaluated<br>**Evaluation field showing list of possible evaluations.** | • To add a new Evaluation field, open the spreadsheet, right click a column header, select **Insert Field**, then click **New**. Type a name and select **Evaluation** from the list. |
| Questions |  C Critical<br>A Extremely Critical<br>B Very Critical<br>C Critical<br>D Not Very Critical<br>? Unsure<br>Unevaluated<br>**A special Evaluation field, called the Criticality field appears in the Questions** | • To add an additional Criticality field to the Questions spreadsheet, right click a column header, select **Insert Field**, then click **New**. Type a name and select **Evaluation** from the list. |

| | **spreadsheet by default.** | |
|---|---|---|
| Persons, Documents, Other Physical Evidence, Events, Places, Pleadings, Proceedings, Other Discovery, Demonstrable Evidence, Other Objects. | Not applicable. | Evaluation fields cannot be added to Object subtype spreadsheets. |

### User Roles and Evaluation Fields

Only you or a scribe user signed in as you can assign values to evaluation fields you have created. However, other authors and scribes not signed in as you can show Evaluation fields you created in their spreadsheet views and see assignments you have made to individual records. Additionally, the Fact Dashboard bar charts can be filtered to show any evaluation fields added by staff to the Facts spreadsheet. For more information, see: Fact Dashboard.

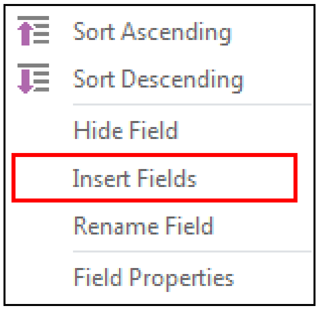
### Evaluation Fields in Case Assessment

When applied to facts, Evaluation fields can play an important role in enabling advanced case assessment capabilities. If evaluation fields are consistently applied to facts, and when facts are also linked to important issues, you can use the Facts Dashboard to monitor the strength of your case as indicated by an evaluation of the facts. For more information, see: Fact Dashboard.

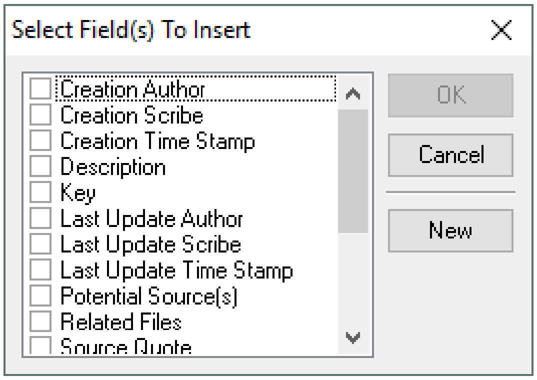
### ⊟ To create a new evaluation field

1. In the CASE SHORTCUTS pane, select the spreadsheet you want to add the field to (e.g., **Facts**).

2. Right click a column header where you want the field to appear, then select **Insert Fields**.

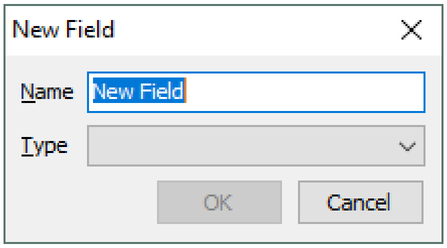


The Select Field(s) To Insert dialog box opens.


Select Field(s) To Insert
☐ Creation Author
☐ Creation Scribe
☐ Creation Time Stamp
☐ Description
☐ Key
☐ Last Update Author
☐ Last Update Scribe
☐ Last Update Time Stamp
☐ Potential Source(s)
☐ Related Files
☐ Source Quote
OK
Cancel
New

3. Click **New**.

   The New Field dialog box opens.


New Field
Type
OK
Cancel

Name: New Field

4. Type a descriptive, unique name for the field.

5. In the Type field, select **Evaluation**, and then click **OK**.

   The new field is added to the list and selected by default.

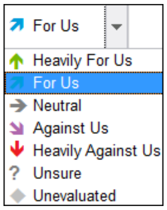
6. Click **OK**.

   The evaluation field is added to the spreadsheet and is ready to use.

### ⊟ To assign values to evaluation fields on spreadsheets

1. Open the spreadsheet that contains the Evaluation field for records you want to work with.

2. Click the Evaluation field cell of the record you want to evaluate, then select a value for the record.


For Us
Heavily For Us
For Us
Neutral
Against Us
Heavily Against Us
Unsure
Unevaluated

If you are unsure which file is an Evaluation field, an easy way is to check the record details for any record in the spreadsheet. For more information, see the next procedure in this topic.

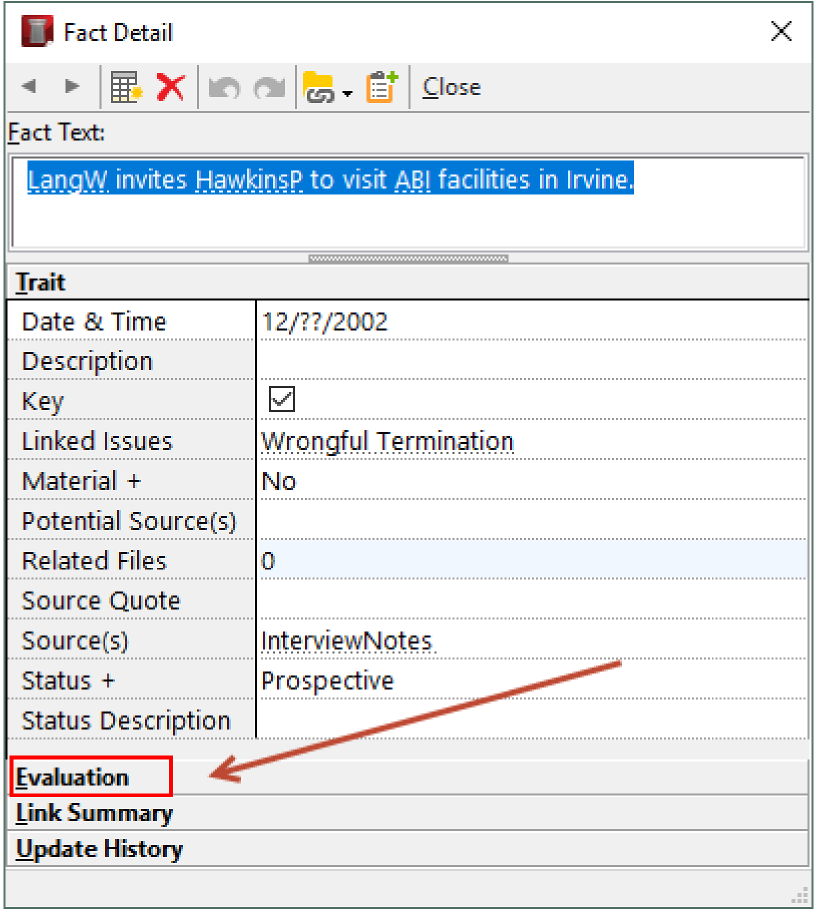
### To assign values to evaluation fields using record details

1. Open the spreadsheet that contains the Evaluation field for records you want to work with.

2. Select the record you want to evaluate.

3. On the HOME Tab, click **Detail**.

   The detail dialog box for the record opens.



Fact Text:

LangW invites HawkinsP to visit ABI facilities in Irvine.

**Trait**

| | |
|---|---|
| Date & Time | 12/??/2002 |
| Description | |
| Key | ☑ |
| Linked Issues | Wrongful Termination |
| Material + | No |
| Potential Source(s) | |
| Related Files | 0 |
| Source Quote | |
| Source(s) | InterviewNotes |
| Status + | Prospective |
| Status Description | |

**Evaluation**

**Link Summary**

**Update History**

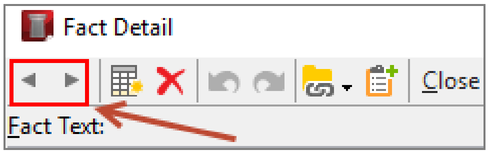
4. Click the **Evaluation** bar.

   All Evaluation fields that exist for the record are listed.

5. Select evaluation values for the record.

6. Do either of the following:

- To go back to the spreadsheet view, click **Close**.
- To evaluate the next or previous record, click the next or previous record (arrow) button on the toolbar.



## ⊟ To assign values to evaluation fields using Fact Cards

1. On the HOME tab, select **Fact Cards**.
2. Select the **Evaluation** tab.
3. Expand **Unevaluated Facts**.
4. Drag cards by the top of the card to evaluation categories in the left panel.

   For more information on using Fact Cards, see: .

## ⊟ Search, tag, and sort evaluation fields

You can run search filters, apply tags, and sort based on values in the Evaluation fields. For example, you can filter the Facts spreadsheet to show only highly rated facts.

### ⊟ To sort by evaluation field

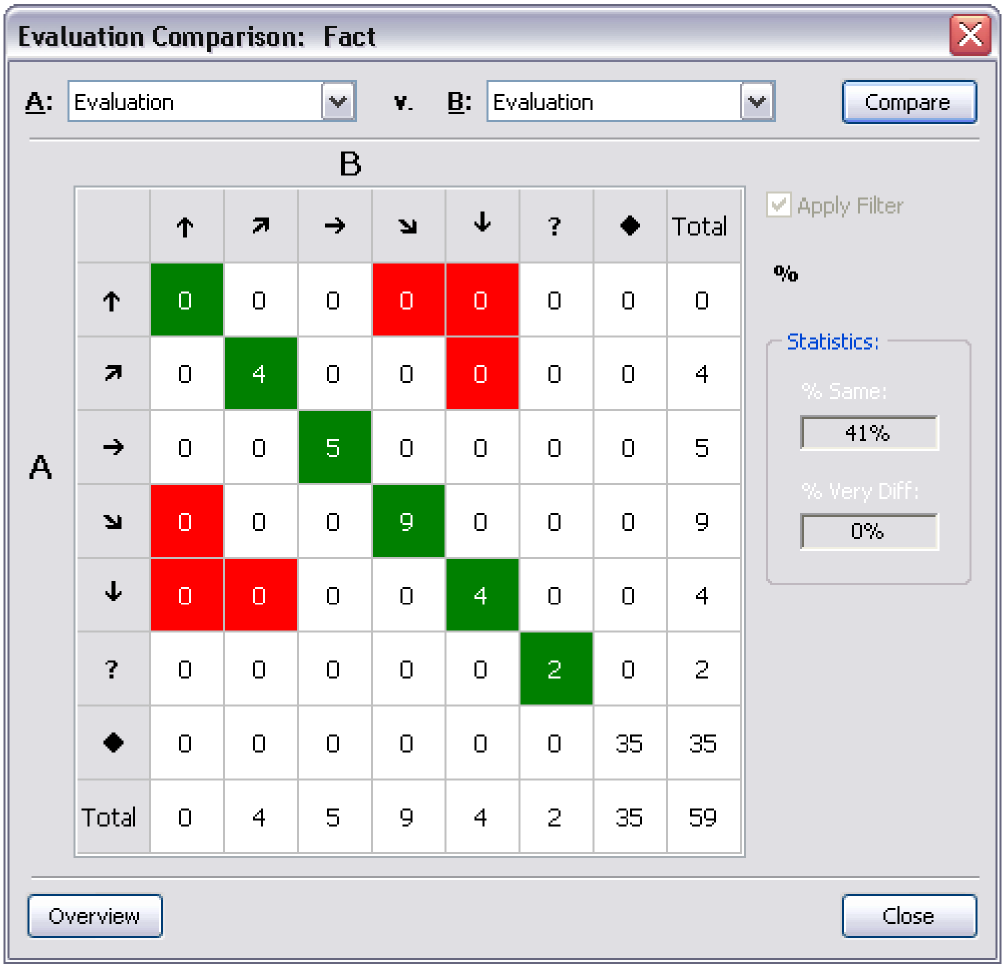
Right-click on the Evaluation field and then select **Sort Ascending** or **Sort Descending**. For example, you can sort the Questions spreadsheet based on question criticality so that the most important questions in your case are listed first.

## ⊟ To compare evaluations using Evauation Comparison tool

CaseMap allows you to have many independent evaluations of each fact, object, issue, 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.

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.



Evaluation Comparison: Fact

A: Evaluation v. B: Evaluation

| A \ B | ↑ | ↗ | → | ↘ | ↓ | ? | ◆ | Total |
|---|---|---|---|---|---|---|---|---|
| ↑ | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| ↗ | 0 | 4 | 0 | 0 | 0 | 0 | 0 | 4 |
| → | 0 | 0 | 5 | 0 | 0 | 0 | 0 | 5 |
| ↘ | 0 | 0 | 0 | 9 | 0 | 0 | 0 | 9 |
| ↓ | 0 | 0 | 0 | 0 | 4 | 0 | 0 | 4 |
| ? | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 2 |
| ◆ | 0 | 0 | 0 | 0 | 0 | 0 | 35 | 35 |
| Total | 0 | 4 | 5 | 9 | 4 | 2 | 35 | 59 |

☑ Apply Filter

%

Statistics:

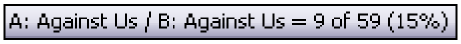
% Same: 41%

% Very Diff: 0%

4. In the **B** drop-down listing, click on another evaluation field.

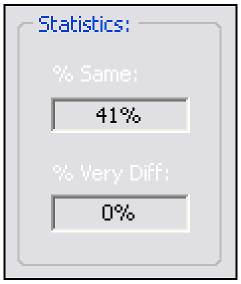
5. Click **Compare** to view the matrix results.

6. Point to a cell to read a summary of results in the bottom left of the CaseMap status bar.



A: Against Us / B: Against Us = 9 of 59 (15%)

Review the comparison display on the right side of the box. There you will find scores of evaluation symbols that are the same or very different.



Statistics:

% Same: 41%

% Very Diff: 0%

7. Double-click in a cell to view source detail.

If you are running a filter, you can choose whether to base your evaluation comparison on the entire set of elements of just on those elements that have survived the filter operation. Check the Apply Filter box in the Evaluation Comparison box to include filters in the comparison. You may want to try running the comparison both ways to view any differences.

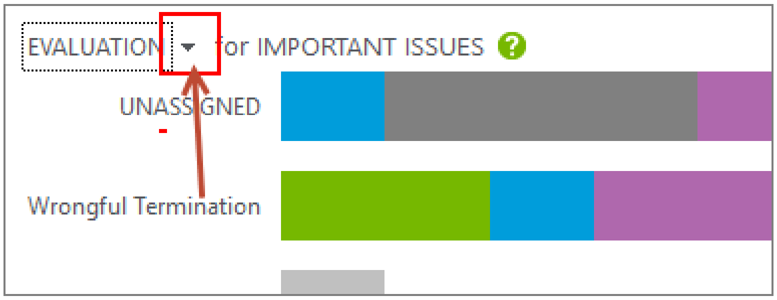
### ⊟ To review fact evaluations for important issues using Fact Dashboard

As a case analysis progresses, you have setup issues, and you have categorized and applied evaluations to facts, you can check your progress by using the bar charts in the Facts Dashboard. If you have more than one evaluation field applied to facts, you can switch between fields to see how different team members have evaluated the very same facts.

1. Select the **Facts** spreadsheet.

2. On the HOME tab, click **Fact Dashboard**.

3. In the bar charts area, click the list selector, then select the evaluation field you want to see results for.



The bar charts represent counts of facts assigned to important issues with evaluations forming bar chart regions.

- To see a popup showing fact counts for each issue, point to bar charts. ]

**Related Topics**

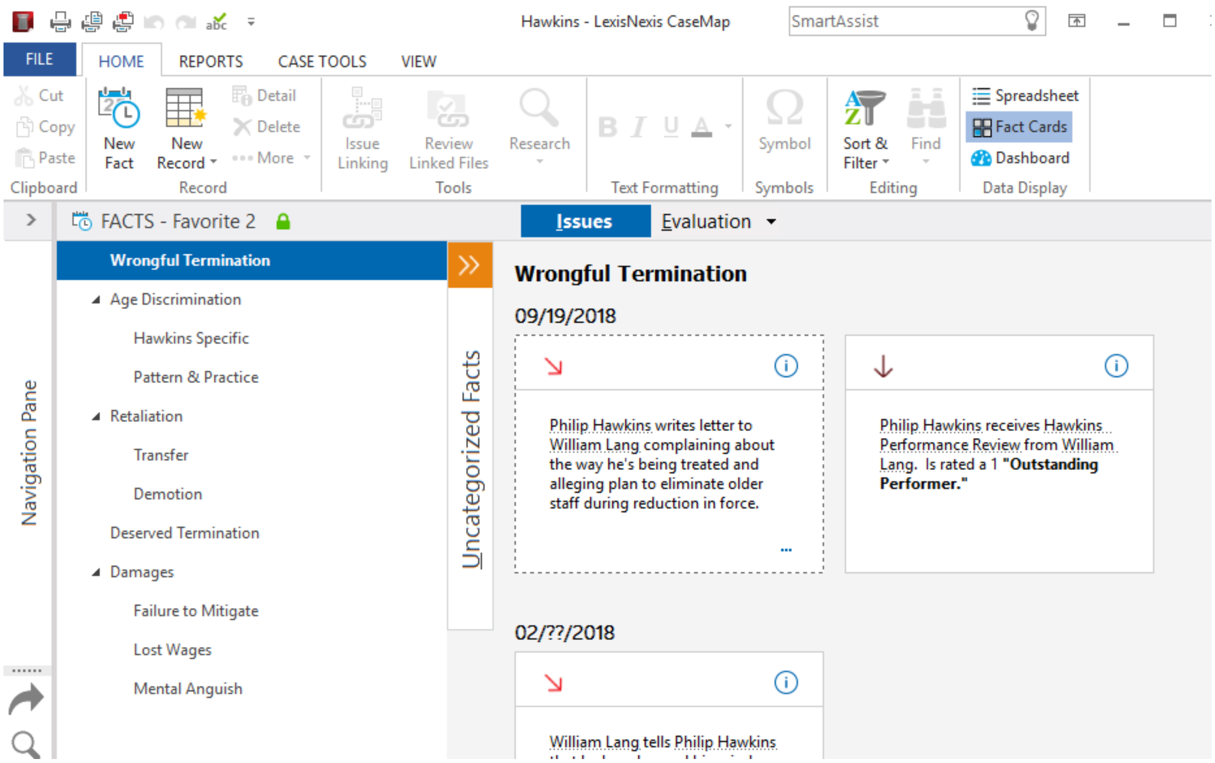
[Creating custom fields](#)

## Fact Cards for issues and evaluations

The Fact Card view arranges facts chronologically, emphasizing fact text, timeline, issues, and evaluation. Working with fact cards can help you to speed up case analysis, and more easily recognize relationships between facts and find hidden narratives in your case.

You can use the Fact Card view to optimize your time you spend applying issues and evaluations to facts. The view provides an option to find facts you haven't yet assigned to an issue or evaluated.

To get the most out of the fact card view, your case should already have issues defined. For more information on issues, see: About issues. It will also help to understand how evaluation fields work in CaseMap. For more information, see: Evaluation fields.


Hawkins - LexisNexis CaseMap
SmartAssist
FILE
HOME
REPORTS
CASE TOOLS
VIEW
Cut
Copy
Paste
Clipboard
New Fact
New Record
Detail
Delete
More
Record
Issue Linking
Review Linked Files
Research
Tools
Text Formatting
Symbol
Symbols
Sort & Filter
Find
Editing
Spreadsheet
Fact Cards
Dashboard
Data Display
FACTS - Favorite 2
Issues
Evaluation
Navigation Pane
Wrongful Termination
Age Discrimination
Hawkins Specific
Pattern & Practice
Retaliation
Transfer
Demotion
Deserved Termination
Damages
Failure to Mitigate
Lost Wages
Mental Anguish
Uncategorized Facts
Wrongful Termination
09/19/2018
02/??/2018

Philip Hawkins writes letter to William Lang complaining about the way he's being treated and alleging plan to eliminate older staff during reduction in force.

Philip Hawkins receives Hawkins Performance Review from William Lang. Is rated a 1 **"Outstanding Performer."**

William Lang tells Philip Hawkins

**Fact cards form a vertical chronology with options to assign and filter issues and evaluations.**

## Timeline organization

Facts are arranged vertically in ascending chronological order. Facts occurring on the same date are placed on the same row. Undated facts are placed in the bottom row. To change the sort order, go to the **Home** tab, click **Sort & Filter**, and select a sort option.

## Filter facts by issue or evaluation

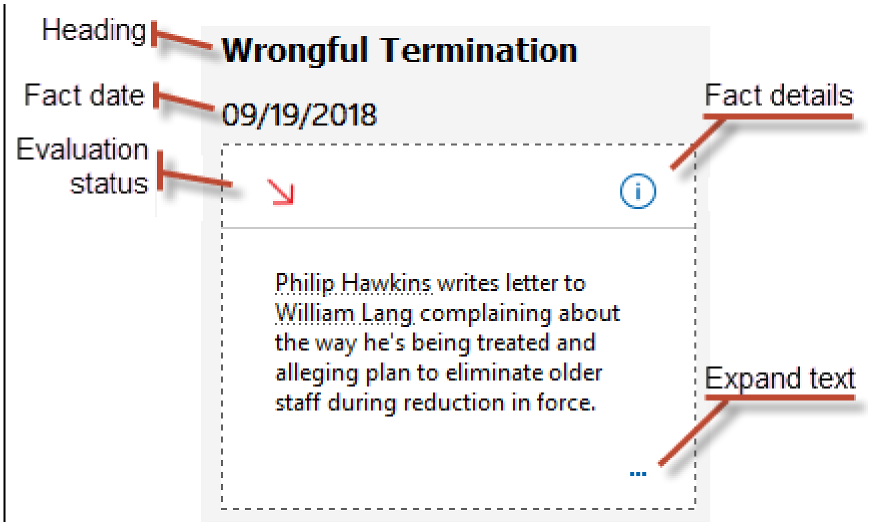
You can filter Fact Cards to show just the facts that are related to a particular issue or evaluation category. This offers the following benefits:

- Filtering by issue can help you to identify lines of reasoning and show how a situation has developed over time.
- Filtering by evaluation gives you insight into the strengths and weaknesses of your case.
- Filtering for and reviewing facts that have not yet been tied to issues can help you to uncover critical facts.
- Filtering for and reviewing facts that have not yet been evaluated can help you to build confidence that your case strategy is viable.

## Assign issues and evaluations to facts

The Fact Card view allows you quickly assign issues and evaluations to facts via quick access to fact detail, button selection, and drag and drop.

## Fact card elements



**Wrongful Termination**

09/19/2018

Philip Hawkins writes letter to William Lang complaining about the way he's being treated and alleging plan to eliminate older staff during reduction in force.

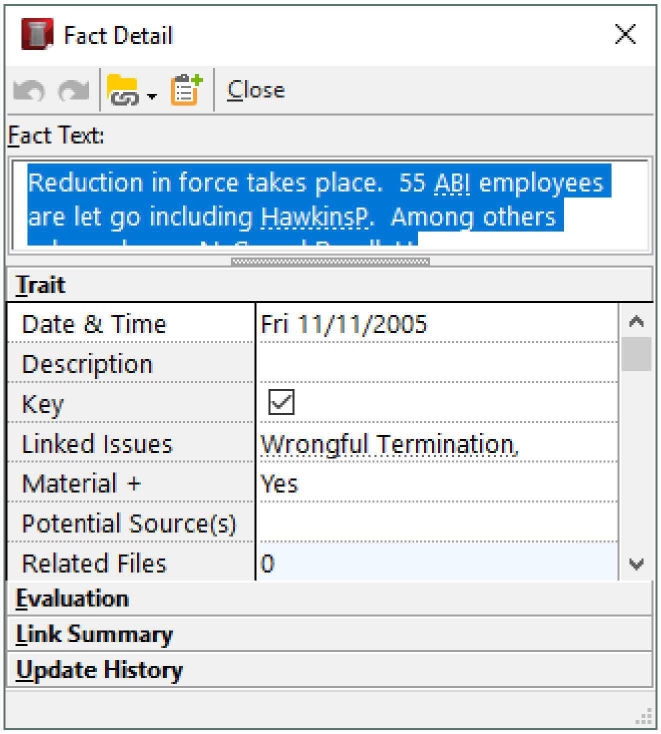
Fact cards consist of the following features:

- Heading. On the Issues tab, identifies the issue to which the fact has been linked. On the Evaluations tab, identifies the evaluation category the cards belong to.
- Fact date. Identifies the date or date range when the fact occurred.
- Evaluation status. Identifies the evaluation status that has been applied to the fact.
- Fact details. Opens the fact details for editing or review.
- Expand text. Opens a pop-out window containing all the fact text. Appears on Fact Cards that contain more text than can be displayed on the card.

### ⊟ Tips for assigning facts to issues and evaluations

A major purpose of Fact Cards is to make it easier to assign issues and apply evaluations to facts. To facilitate this objective, Fact Cards allow three ways to make these assignments. These ways are described in the following table:

| To assign a fact: | More information |
|---|---|
| Click the fact details button on any card.<br>ⓘ | This action opens the fact detail dialog box. |



Reduction in force takes place. 55 ABI employees are let go including HawkinsP. Among others

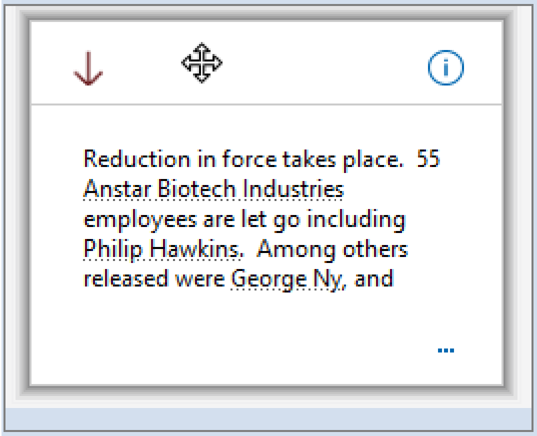
| Trait | |
|---|---|
| Date & Time | Fri 11/11/2005 |
| Description | |
| Key | ☑ |
| Linked Issues | Wrongful Termination, |
| Material + | Yes |
| Potential Source(s) | |
| Related Files | 0 |

- To assign an issue, click **Linked Issues**, then type the names of linked issues in the box separated by commas.
- To evaluate, click **Evaluation**, then select a value from the list.

Drag the card onto an issue or evaluation.

This action assigns the fact to a single issue or evaluation.

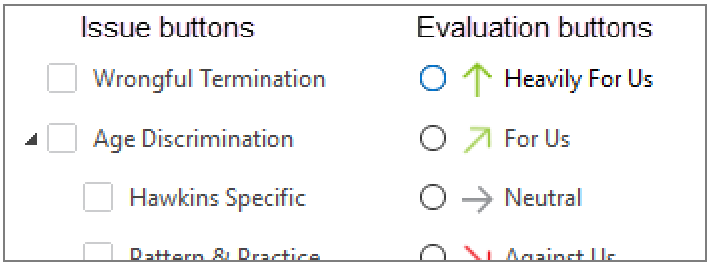
A card may be dragged by its center top margin, then dropped onto an issue or evaluation.



Reduction in force takes place. 55 Anstar Biotech Industries employees are let go including Philip Hawkins. Among others released were George Ny, and

**Drag Fact Cards from the upper section of the card.**

When assigning issues, drag and drop limits you to assigning the fact to a single issue at a time. If a fact already has multiple issues assigned and you drag the fact onto one of the issues, the other

| | |
|---|---|
| | issues may be removed. If you plan to assign facts to multiple issues, it is highly recommended that you change the assignment mode to buttons.<br>To assign a fact to multiple issues, change the assignment mode to buttons. To do this, click any card. Check boxes appear next to issues. Then you can select check boxes for each issue you want to assign to the fact. |
| Click a card, then click a button. | This action allows you to assign the fact to as many issues as you want.<br>You can change assignment mode for Fact Cards from drag and drop to buttons.<br>1. To toggle modes, click a card.<br>Buttons (check boxes for issues and radio buttons for evaluations) appear next to issues or evaluations.<br> Issue buttons<br>Evaluation buttons<br>Wrongful Termination<br>Heavily For Us<br>Age Discrimination<br>For Us<br>Hawkins Specific<br>Neutral<br>Pattern & Practice<br>Against Us<br>2. Then click issues or an evaluation to complete the assignment.<br>3. Click the card again to hide the buttons and use drag and drop to assign instead. |

Click any card once to turn off drag and drop selection and show buttons instead. Click a card again to hide buttons and re-enable drag and drop.

### To filter Fact Cards by issue

1. On the Home ribbon, click **Fact Cards**.
2. Click the **Issues** tab, if it is not already selected.
3. In the left pane, click the issue to see facts assigned ot it.

### To change existing issue assignments

1. On the Home ribbon, click **Fact Cards**.
2. Click the **Issues** tab, if it is not already selected.
3. Click the card you want to change.
   In the left pane, buttons appear next to the issues. If buttons do not appear immediately, click the card again.

Click any card once to turn off drag and drop selection and show buttons instead. Click a card again to hide buttons and re-enable drag and drop.

## To find facts not yet assigned to an issue

1. On the Home ribbon, click **Fact Cards**.
2. Click the **Issues** tab, if it is not already selected.
3. Click the **Uncategorized Facts** list expander.
   »
   **The expander shows the list of uncategorized facts.**
4. To assign a fact to an issue, select it.
   Check boxes appear in the issue list.
5. Select check boxes on issues you want the fact to be associated with.
   Assignments are immediate. But the issue remains visible in the uncategorized list until the list is refreshed.
6. To refresh the list, click the white space between other cards in the list.

## To filter facts by evaluation category

1. On the Home ribbon, click **Fact Cards**.
2. Click the **Evaluation** tab.
3. In the left pane, click an evaluation category to see facts assigned ot it.
   - To see facts that have not yet been evaluated, click the **Unevaluated Facts** expander.

   »

## To review unevaluated facts

1. On the Home ribbon, click **Fact Cards**.
2. Click the **Evaluation** tab.
3. In the left pane, click the **Unevaluated Facts** expander.

   »

4. In the filtered list of facts, select the fact you want to evaluate.
   Radio buttons appear next to the evaluation categories in the left pane.
5. Select the evaluation category you want to apply.

   The Evaluation field for the fact is changed to the value you selected.
6. Click a different card.

The card you evaluated is removed from the Unevaluated Facts list.

### ⊟ To evaluate a fact by opening the fact details

1. On the Home ribbon, click **Fact Cards**.
2. On the Fact Card you want to change, click ⓘ the fact detail button.

   The fact detail dialog box opens.
3. Click **Evaluation**..
4. Select an evaluation for the fact and then click **Close**.

### ⊟ To change sort order of Fact Cards

By default, Fact Cards are sorted in ascending chronological order, but you can change the sort order to descending.

1. Click **Sort & Filter** on the Home ribbon.
2. Click the option to **Sort Ascending** or **Sort Descending**.

### ⊟ To create a Fact Chronology report from Fact Cards

You can run a Fact Chronology report populated with the facts that are listed in the Fact Card view.

> Uncategorized facts are not included in the report.

1. Open the **Facts** spreadsheet.
2. On the Home menu, click **Fact Cards**.
3. Select the issues you are want to include in the report. Or to create a report on evaluated facts, click the **Evaluation** tab, and then select an evaluation category.
4. On the Reports ribbon, click **Print** and then click **Preview**.
5. Inspect the print preview, then print, save, or send the report as needed.

### ⊟ To create new facts

You can create facts in the Fact Cards view.

1. Open the **Facts** spreadsheet.
2. On the Home menu, click **Fact Cards**.
3. On the Home ribbon, click **New Fact**.
4. Enter the fact details and then click **Close**.

   The new Fact Card can be found in the corresponding Issue and/or Evaluation status.

If you do not assign an issue to the fact, the new fact is placed in the Uncategorized Facts list.

### To delete facts from Fact Cards view

You can permanently delete facts from the case while working in Fact Cards view.

1. Select the Fact Card you want to delete.
2. Do either of the following:
    - Click **Delete** on the Home ribbon.
    - Press **Ctrl**+**Delete**.
3. Click **Yes** to confirm deletion.

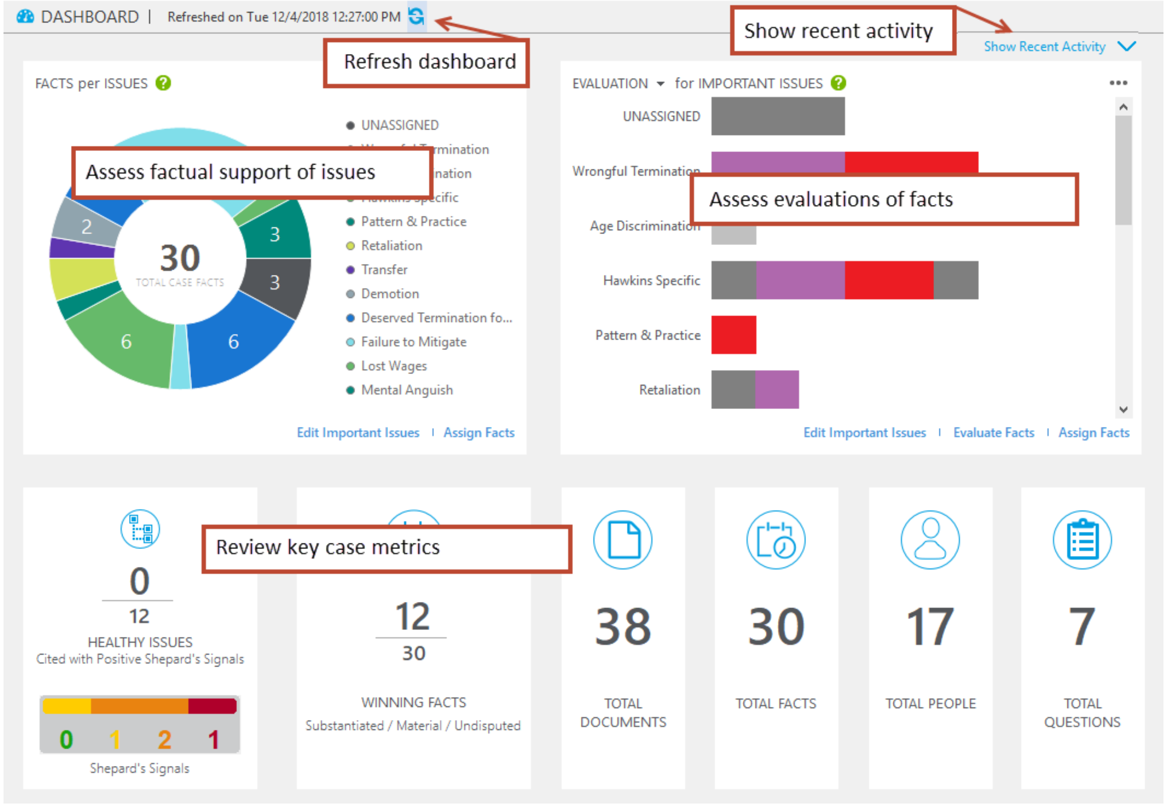
⚠ Once the Fact Card has been deleted, the fact is permanently removed from the case.

Related Topics

About facts
About evaluation tools

## Fact Dashboard

You can quickly assess the overall health of a case by using the Facts Dashboard. Its displays are divided into these areas:



Show recent activity

Refresh dashboard

Assess factual support of issues

Assess evaluations of facts

Review key case metrics

DASHBOARD | Refreshed on Tue 12/4/2018 12:27:00 PM
Show Recent Activity
FACTS per ISSUES
30
TOTAL CASE FACTS
2
3
3
6
6
UNASSIGNED
Pattern & Practice
Retaliation
Transfer
Demotion
Deserved Termination fo...
Failure to Mitigate
Lost Wages
Mental Anguish
Edit Important Issues | Assign Facts
EVALUATION for IMPORTANT ISSUES
UNASSIGNED
Wrongful Termination
Age Discrimination
Hawkins Specific
Pattern & Practice
Retaliation
Edit Important Issues | Evaluate Facts | Assign Facts
0
12
HEALTHY ISSUES
Cited with Positive Shepard's Signals
0 1 2 1
Shepard's Signals
12
30
WINNING FACTS
Substantiated / Material / Undisputed
38
TOTAL DOCUMENTS
30
TOTAL FACTS
17
TOTAL PEOPLE
7
TOTAL QUESTIONS

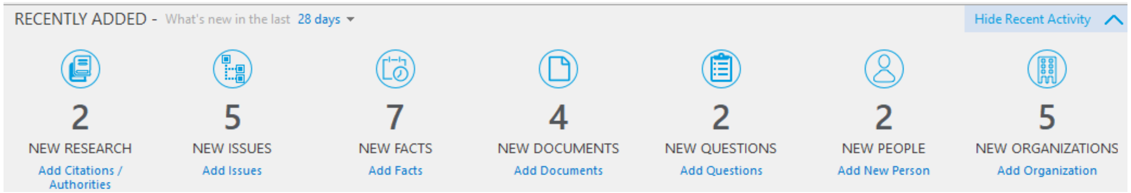
These are the ways you can use the Fact Dashboard to assess your case:

- Review recent case activity. To see recently added research, issues, facts, documents and more, expand the RECENT ACTIVITY panel.
- Assess factual support of issues. Refer to the FACTS per ISSUES donut chart. This chart helps you assess case strength, expressed in how strongly the facts are tied to important issues
- Assess evaluations of facts. Refer to the EVALUATION and TEAM EVALUATION bar graphs. These help you determine whether the facts you have assigned to important issues work for or against your case.
- Review key case metrics. Refer to the TOTAL counts. This area provides counts of a number of key metrics. For example, the HEALTHY ISSUES metric can give you cited with positive Shepard's Signals, along with counts of winning facts, documents, facts, people, and documents of your case.

You can also refresh the dashboard, which is advised especially when other users are working on the case at the same time as you.

## ⊟ Review recent activity

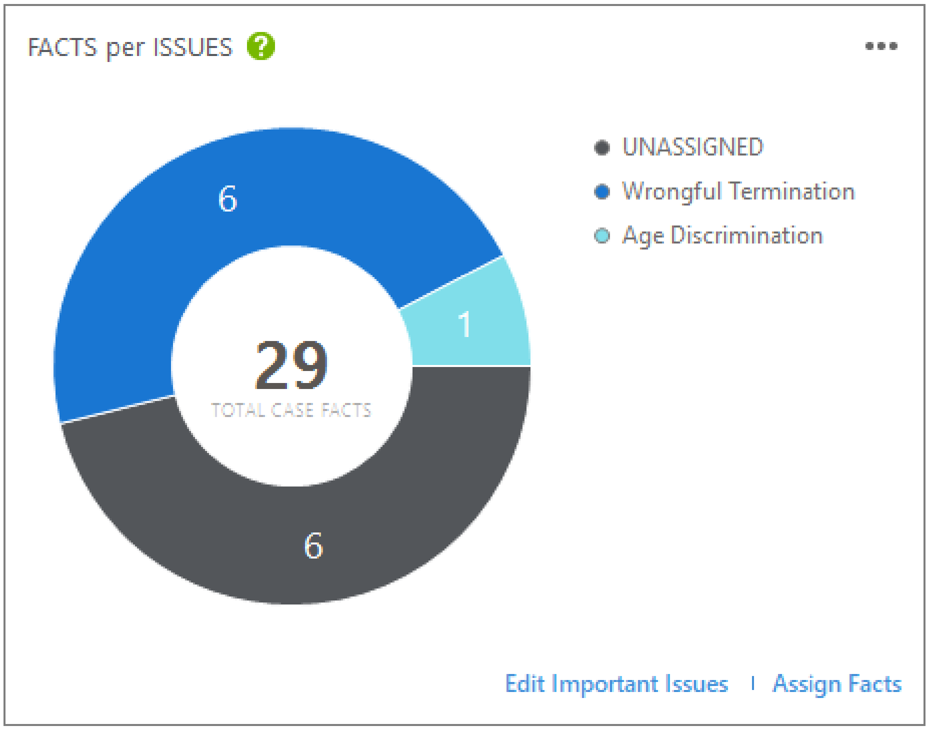
1. Click **Show Recent Activity**. This link is located in the upper right corner of the dashboard.
   The RECENTLY ADDED panel opens in the top of the dashboard.


RECENTLY ADDED - What's new in the last 28 days
Hide Recent Activity
2
NEW RESEARCH
Add Citations / Authorities
5
NEW ISSUES
Add Issues
7
NEW FACTS
Add Facts
4
NEW DOCUMENTS
Add Documents
2
NEW QUESTIONS
Add Questions
2
NEW PEOPLE
Add New Person
5
NEW ORGANIZATIONS
Add Organization

2. Do any of the following to work with the panel:
   - To show counts for a different timescale, select the **What's new in the last** list, then select a different timescale.
   - To add new items, click shortcuts on the panel.
   - To hide the panel, click **Hide Recent Activity**.

## Assess factual support of issues (donut chart)

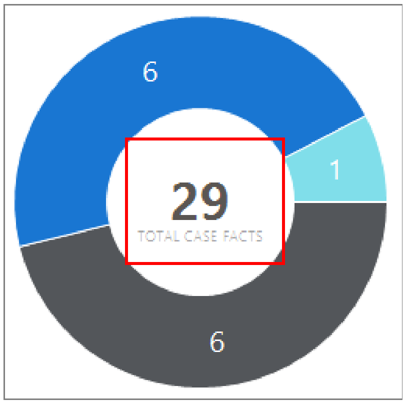
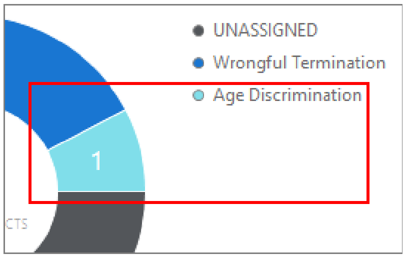
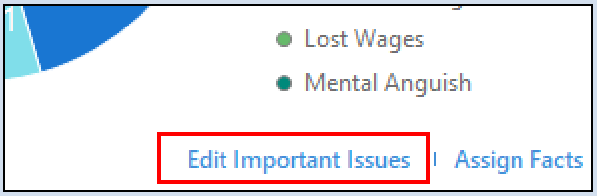
1. On the Home tab, click **Dashboard**.
2. Consult the **FACTS per ISSUES** (donut) chart. This chart provides a count of all facts, a breakdown of facts associated with each issue in the case marked as Important. Factual coverage of issues is evident.

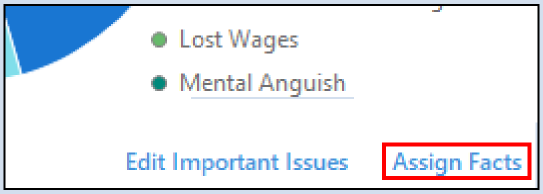
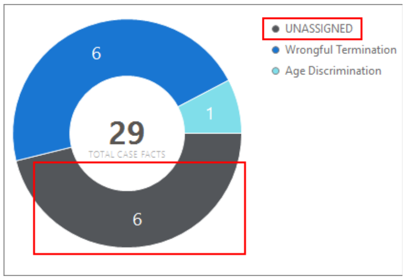

FACTS per ISSUES
?
•••
UNASSIGNED
Wrongful Termination
Age Discrimination
6
1
6
29
TOTAL CASE FACTS
Edit Important Issues
Assign Facts

**Click or point to segments of the chart to assess fact-to-issue relationship strength.**

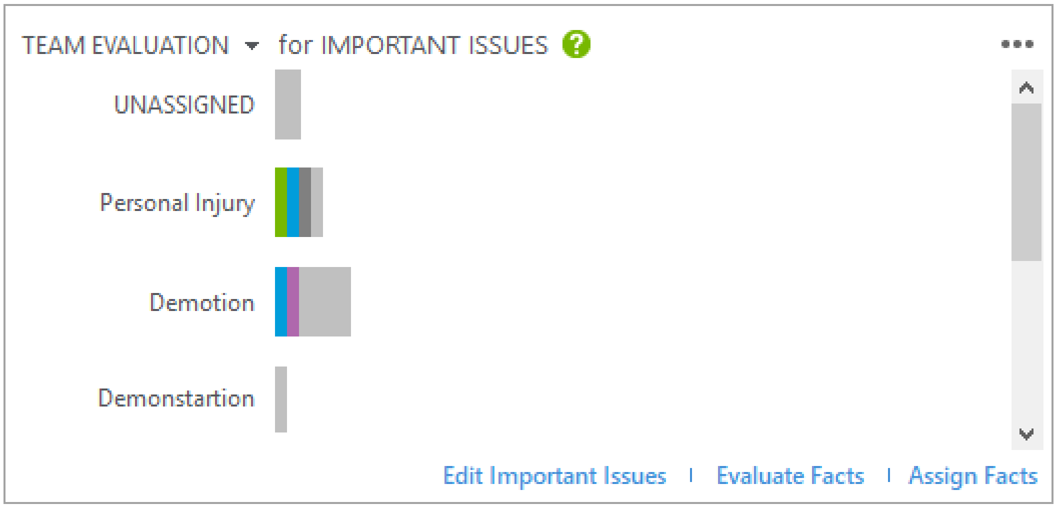
3. Check the chart for the following conditions:

| This condition: | Description/Remediation: |
|---|---|
| **A low total number of facts** | May indicate a case that needs more data to be added (documents, etc.), more facts to be identified through analysis of existing data, or both. |

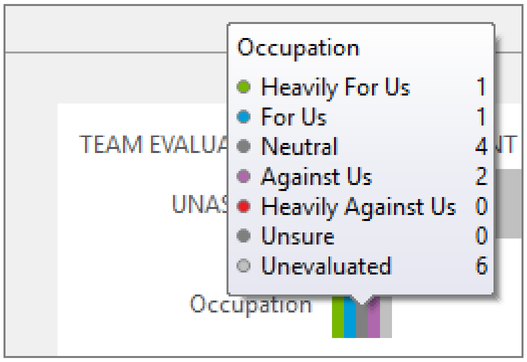
| | |
|---|---|
|  | • To add more data, start by reviewing any documents, email, or other information pertaining to the case that has not yet been sent to CaseMap.<br>• If your CaseMap case already has a good amount of documents and data, but not enough facts, it may be advisable to review the documents and attempt to identify more facts.<br>For more information, see: About entering data. |
| | |
| **Segments with low fact counts**<br>  UNASSIGNED<br>Wrongful Termination<br>Age Discrimination<br>1<br>CTS | May indicate an issue with insufficient factual support.<br>• To see a popup of the issue name and its fact count, point to the segment.<br>• To open the Facts spreadsheet filtered to the issue, click the segment.<br>• You can also try to find facts that have not yet been assigned to see if they support the issue. To see all unassigned facts, click the **UNASSIGNED** segment, or click **Fact Cards** and then expand **Uncategorized Facts**. For more information on using Fact Cards, see: Fact cards. |
| **Issues missing from chart** | Indicates an issue is not marked as Important and/or has no facts assigned to it. For an issue to appear on the chart, it must be marked as Important in the Issues spreadsheet and one or more facts must be assigned to it.<br>• To check whether the missing issue is marked as Important in the Issues spreadsheet, click the **Edit Important Issues** link.<br>  Lost Wages<br>Mental Anguish<br>Edit Important Issues<br>Assign Facts<br>This opens the Issues spreadsheet. From there, place a check mark in the Important field to make it appear in the chart. Then click Fact Dashboard. The issues marked as Important appear in the chart.<br>• To check whether any facts have been assigned to the issue, click the **Assign Facts** link. |

| | |
|---|---|
| |   Lost Wages<br>Mental Anguish<br>Edit Important Issues<br>Assign Facts<br>This will open the Facts spreadsheet. |
| **Chart contains block of unassigned facts**<br> | May indicate the need for more analysis to assign facts to issues.<br>To resolve, review the unassigned facts using either the Facts spreadsheet or the Fact Cards view.<br>• To review unassigned facts using the Facts spreadsheet filtered to show unassigned facts, click the gray UNASSIGNED chart segment.<br>• To review unassigned facts using the Fact Cards view, click **Fact Cards**, then expand **Uncategorized Facts**. For more information on categorizing facts with Fact Cards, see: Fact cards. |

## ⊟ Assess evaluations of facts (bar charts)


TEAM EVALUATION
for IMPORTANT ISSUES
?
UNASSIGNED
Personal Injury
Demotion
Demonstartion
Edit Important Issues
Evaluate Facts
Assign Facts

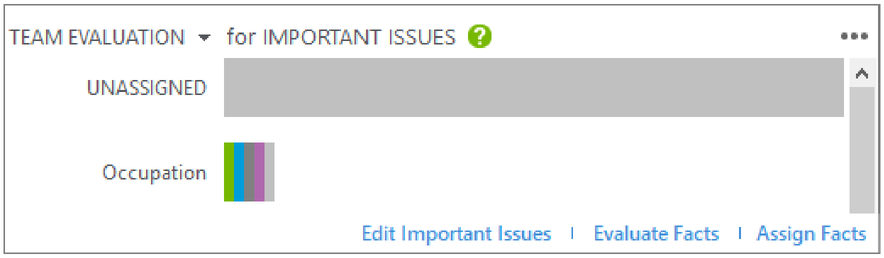
1. On the Home tab, click **Dashboard**.
2. Consult the **IMPORTANT ISSUES** bar charts. For each important issue in your case, this chart provides a count of facts a count, including how the facts have been evaluated as helping or hurting your case.



| Occupation | |
|---|---|
| ● Heavily For Us | 1 |
| ● For Us | 1 |
| ● Neutral | 4 |
| ● Against Us | 2 |
| ● Heavily Against Us | 0 |
| ● Unsure | 0 |
| ○ Unevaluated | 6 |

**Point to bar chart segments to see a count of fact evaluations.**

3. Examine the bar charts to check for conditions and apply remediation, as described in the following table:

| Condition: | Description/Remediation: |
|---|---|
| **Message says "There are no evaluations for this case"** | This situation occurs if the Fact spreadsheet does not contain an Evaluation field.<br>**To add an evaluation field**<br>1. Click the link, **Please add an evaluation field**.<br>2. In the Select View dialog box, select a view that you want the new Evaluation field to appear in, and then click **OK**.<br>A new evaluation field called Team Evaluation is added to the Facts spreadsheet.<br>For more information on Evaluation fields, see: Evaluation fields. |
| **Message says "There are no important issues designated for this case"** | This situation occurs if case does not contain any issues marked as Important.<br>**To add issues or mark them as important**<br>1. Click the |
| **A high number of unassigned facts**<br>Unassigned facts are those that have not been assigned to an issue. |  TEAM EVALUATION ▾ for IMPORTANT ISSUES ?<br>UNASSIGNED<br>Occupation<br>Edit Important Issues \| Evaluate Facts \| Assign Facts<br>**The UNASSIGNED category contains many more facts that the Occupation issue.**<br>This situation may occur if issues are not yet yet defined. Or it may indicate that the case needs more analysis to match facts to issues. Be sure the case issues are well-defined and structured the way that best reflects what the case is about. Next, perform analysis needed to categorize facts according to the issues. |

**To reduce the number of unassigned facts**

1. Click **Edit Important Issues**.
   The Issues spreadsheet opens.

2. Check that case issues are well-defined and then add or change issues as needed.
   For more information on editing issues, see: About issues.

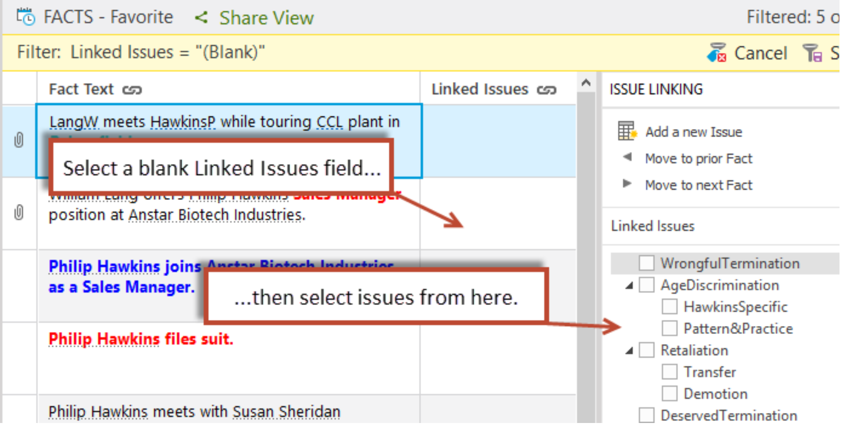
3. Click **Facts Dashboard**.

4. In the fact evaluation bar chart area, click **Assign Facts**.
   The Facts spreadsheet opens.

5. On the Home tab, click **Issue Linking.**
   The ISSUE LINKING panel becomes visible.

6. Optionally, right-click a blank Linked Issues field, then select Filter by Selection.
   Only facts with blank Linked Issues fields show.

7. Select the Linked Issues field for a fact you want to categorize, then select one or more issues in the ISSUE LINKING panel.


FACTS - Favorite
Share View
Filtered: 5 o
Cancel
S
Fact Text
Linked Issues
ISSUE LINKING
Add a new Issue
Move to prior Fact
Move to next Fact
Linked Issues
☐ WrongfulTermination
☐ AgeDiscrimination
☐ HawkinsSpecific
☐ Pattern&Practice
☐ Retaliation
☐ Transfer
☐ Demotion
☐ DeservedTermination

Filter: Linked Issues = "(Blank)"

LangW meets HawkinsP while touring CCL plant in

position at Anstar Biotech Industries.

Philip Hawkins joins

as a Sales Manager.

Philip Hawkins files suit.

Philip Hawkins meets with Susan Sheridan

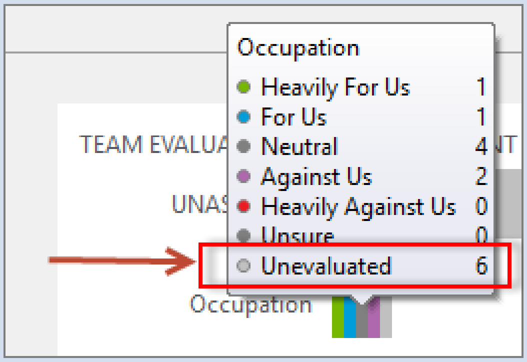
Select a blank Linked Issues field...

...then select issues from here.

8. Repeat the previous step as needed for other facts you want to categorize.

9. Click **Facts Dashboard**.
   The bar chart for unassigned facts should be reduced in size or

| | |
|---|---|
| **Issues contain unevaluated facts** | 1. Point to the bar for an issue.<br>A popup shows a count of facts in each evaluative category. |


Occupation
Heavily For Us 1
For Us 1
Neutral 4
Against Us 2
Heavily Against Us 0
Unsure 0
Unevaluated 6
TEAM EVALUA
UNAS
Occupation

2. Notice the count of facts that are in the Unevaluated category. If the count is greater than zero, it may be helpful to open the unevaluated facts and apply evaluations.

3. To open unevaluated case facts, click Evaluate Facts.

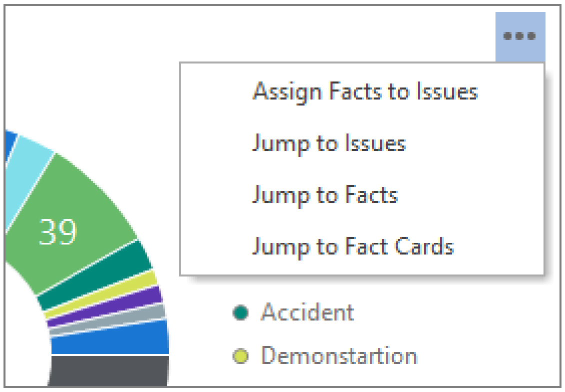
   The Fact Cards opens configured to allow you to drag unevaluated facts onto evaluation categories.

4. Drag unevaluated facts onto evaluation categories. For more information on evaluating facts with Fact Cards, see: Fact cards.

## ⊟ Chart quick menu options

Both the donut and bar chart provide shortcuts for opening spreadsheets and Fact Cards.

1. Click the ••• button, which is located in the upper right corner of either the donut or bar chart area.


•••
Assign Facts to Issues
Jump to Issues
Jump to Facts
Jump to Fact Cards
39
Accident
Demonstartion

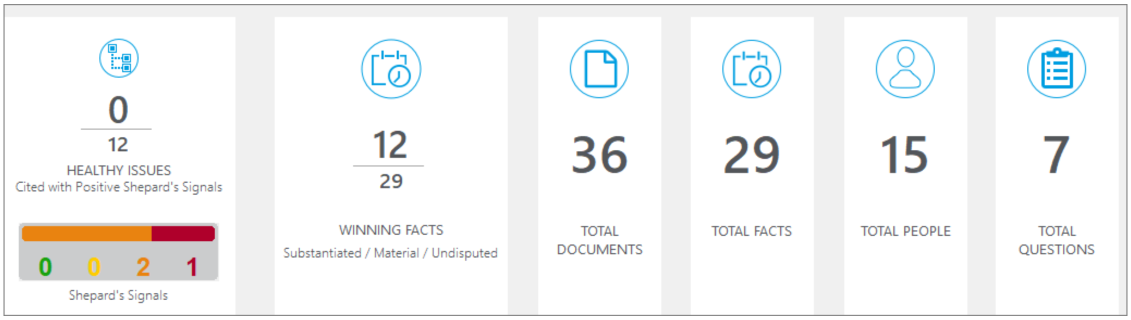
2. Click one of the following options, depending on what you want to do:

| To perform this action: | Click this: |
|---|---|
| Open Fact Cards to assign categories or evaluations to facts. | **Assign Facts to Issues** |

| | |
|---|---|
| Open the Issues spreadsheet. | **Jump to Issues** |
| Open the Facts spreadsheet. | **Jump to Facts** |
| Assign categories or evaluations to facts by using Fact Cards. | **Jump to Fact Cards** |

### Review key case metrics

To check quick metrics for your case, review the following running counts:



**HEALTHY ISSUES**. Figures are counts of issues coded by color:

- Green. The count of issues linked to a green Shepard's Signal indicator. Green indicates that citing references in the Shepard's Citations Service contain history or treatment that has a positive impact on your case (for example, affirmed or followed by).
- Yellow. The count of issues linked to a yellow Shepard's Signal indicator. Yellow indicates that citing references in the Shepard's Citations Service contain history or treatment that may have a significant negative impact on your case (for example, limited or criticized by).
- Orange. The count of issues linked to an orange Shepard's Signal indicator. Orange indicates that the citing references in the Shepard's Citations Service contain treatment that questions the continuing validity or precedential value of your case because of intervening circumstances, including judicial or legislative overruling.
- Red. The count of issues linked to a red Shepard's Signal indicator. Red indicates that citing references in the Shepard's Citations Service contain strong negative history or treatment of your case (for example, overruled by or reversed).

To review any yellow-, orange-, or red-coded Shepard's Signals, open the Research spreadsheets. On the HOME tab, expand **All Shortcuts**, then select **Research**.

**WINNING FACTS**. This metric provides a summary of the highest value facts in the case. The top number is the count of winning facts. A fact is defined as winning when it is marked as Substantiated, Material, and Undisputed. The lower number is a total of all case facts.

**TOTAL DOCUMENTS**. This is a count of all documents in the Documents spreadsheet.

**TOTAL FACTS**. This is a count of the total number of facts in the Facts spreadsheet.

**TOTAL PEOPLE**. This is a count of all people in the People spreadsheet.

**TOTAL QUESTIONS**. This is a count of all questions in the Questions spreadsheet.

### To refresh the dashboard

Refresh the dashboard to be sure the it is displaying the most current information from the case database.

- Click , the refresh button.
  The dashboard queries the case database and updates all displays.

Related Topics

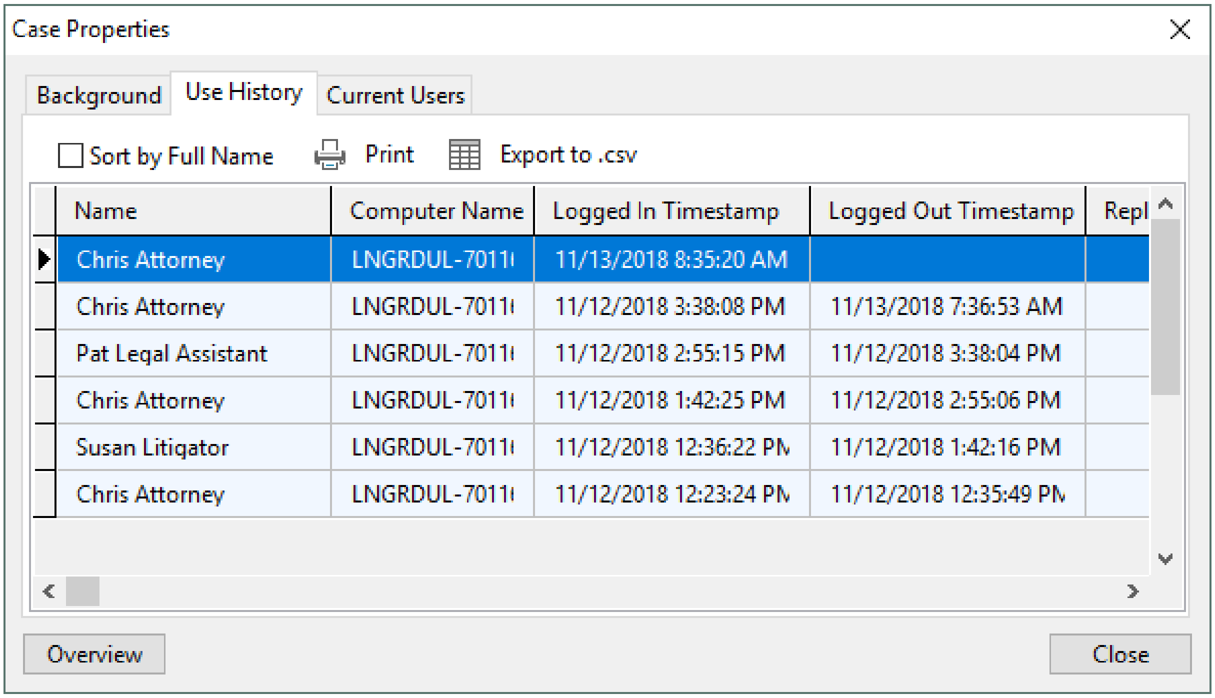
[About entering data]()

[About issues]()

[Fact cards]()

## Reviewing use history

You can open a report that tells you the usage history of the case you have open.



Case Properties
Background
Use History
Current Users
☐ Sort by Full Name
Print
Export to .csv
Overview
Close

| Name | Computer Name | Logged In Timestamp | Logged Out Timestamp | Repl |
|---|---|---|---|---|
| Chris Attorney | LNGRDUL-7011 | 11/13/2018 8:35:20 AM | | |
| Chris Attorney | LNGRDUL-7011 | 11/12/2018 3:38:08 PM | 11/13/2018 7:36:53 AM | |
| Pat Legal Assistant | LNGRDUL-7011 | 11/12/2018 2:55:15 PM | 11/12/2018 3:38:04 PM | |
| Chris Attorney | LNGRDUL-7011 | 11/12/2018 1:42:25 PM | 11/12/2018 2:55:06 PM | |
| Susan Litigator | LNGRDUL-7011 | 11/12/2018 12:36:22 P | 11/12/2018 1:42:16 PM | |
| Chris Attorney | LNGRDUL-7011 | 11/12/2018 12:23:24 P | 11/12/2018 12:35:49 P | |

**File > Case Setup > Case Properties > Use History**

Each row of the report includes the following fields:

- Name of user who opened the case
- Computer name used to open the case
- Login and logout timestamps
- Replica number that was accessed

The report may also be printed or exported to CSV file.

### ⊟ To view usage history

1. Open the case you want to review.
2. On the **File** menu, click **Case Setup**, and then click **Case Properties**.
3. Click the **Use History** tab.

   The report displays on the tab with entries listed in reverse chronological order by default.
4. Perform other actions as needed to work with the report:

| Option | Action |
|---|---|
| Sort the report by user name. | Select **Sort by Full Name**. |
| Review the most recent sessions. | Make sure that the Sort by Full Name check box is cleared, then scroll to the top of the list. |
| See who is currently logged into the case. | Look for entries without a logout timestamp, or click the **Current Users** tab. |
| Print the report. | Click **Print**. |
| Export the report to a spreadsheet-compatible file. | Click **Export to .csv**. |

Related Topics

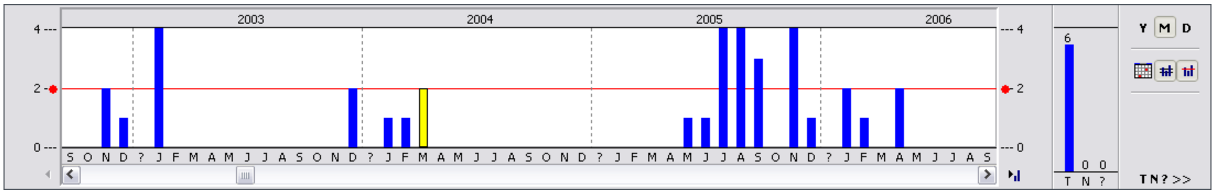
Adding users to cases
Deactivating or deleting users
Entering case properties

# *CaseWide Fact Timelines*

## About CaseWide Fact Timelines

CaseWide is a bar graph representing a timeline of the facts in your case. It displays across the top of the Facts spreadsheet.

You can use CaseWide to review the facts occuring in a particular period of time. When the timeline is narrowed to show specific dates, you can double-click a bar for a specific date to open a list of facts for that date.


2003
2004
2005
2006
4
2
0
S O N D ? J F M A M J J A S O N D ? J F M A M J J A S O N D ? J F M A M J J A S O N D ? J F M A M J J A S
6
0 0
T N ?
Y M D
T N ? >>

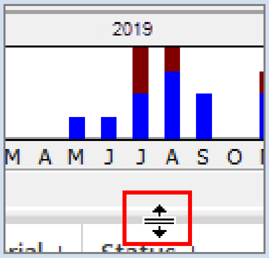
**Each time the Facts spreadsheet is updated or refreshed, the graph is redrawn.**

The CaseWide timeline reflects whatever search filters are in place and the tags applied to facts.

- Filtering will typically reduce the number of facts shown in the CaseWide timeline.
- Tagged facts are reflected as a stacked bar chart. The lower section is blue and represents untagged facts. The upper section is maroon and represents tagged records.
- Move your mouse over the bar to view a count and percentage of untagged- versus tagged facts.

## ⊟ Basic operation

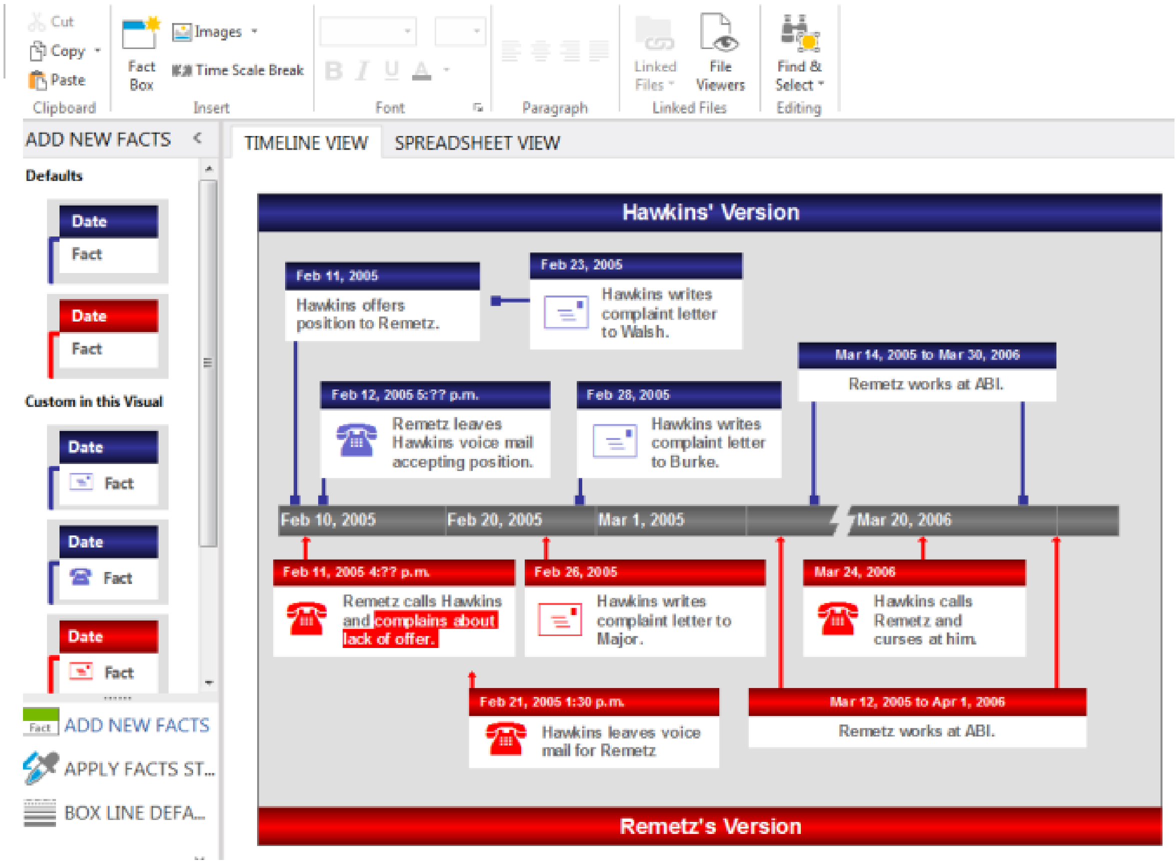
1. Open a case.
2. Click the **Facts** spreadsheet.
3. Click **View**, then select **CaseWide**.
   The graph opens.

| To accomplish this: | Do this: |
|---|---|
| Switch the view between year, month and day. | Click the **Y**, **M**, or **D** button. |
| Zoom to a month or day. | Double-click a bar when in the Month or Year view. |
| Open a list of facts for a date. | Double-click a bar when in the Day view. |
| Adjust the timeline height. | Drag the frame under the scroll bar up or down.  |
| Open a list of facts for a date. | Change the view to show days, then double click a bar. |

| To accomplish this: | Do this: |
|---|---|
| Count the facts calculated for a time period. | Click bars on the graph. |
| Count the facts in a tagged section and the percentage this number represents of the total facts in the bar. | Point to a bar. |
| Open a sidebar graph tracking fuzzy dates. | Click **TN?**. |
| Show gridlines. | Click ⋕.<br>Or right-click the timeline and then click **Gridlines**. |
| Show an average line. | |
| Show a custom date range. | Click 📅 and enter dates.<br>Or right-click the timeline and then click **Date Navigator.** |
| Close CaseWide. | Click **View**, and then clear the **CaseWide** checkbox. |

## ⊟ Send facts, documents, or events to TimeMap

You can send CaseMap facts to TimeMap® the timeline graphing tool from LexisNexis you can use to create robust timeline chronologies. In addition to creating chronologies, TimeMap provides a customizable presentation mode for use in courtroom and office presentations.


Cut
Copy
Paste
Clipboard
Fact Box
Images
Time Scale Break
Insert
Font
Paragraph
Linked Files
File Viewers
Linked Files
Find & Select
Editing
ADD NEW FACTS
Defaults
Date
Fact
Date
Fact
Custom in this Visual
Date
Fact
Date
Fact
Date
Fact
ADD NEW FACTS
APPLY FACTS ST...
BOX LINE DEFA...
TIMELINE VIEW
SPREADSHEET VIEW
Hawkins' Version
Feb 11, 2005
Hawkins offers position to Remetz.
Feb 23, 2005
Hawkins writes complaint letter to Walsh.
Mar 14, 2005 to Mar 30, 2006
Remetz works at ABI.
Feb 12, 2005 5:?? p.m.
Remetz leaves Hawkins voice mail accepting position.
Feb 28, 2005
Hawkins writes complaint letter to Burke.
Feb 10, 2005
Feb 20, 2005
Mar 1, 2005
Mar 20, 2006
Feb 11, 2005 4:?? p.m.
Remetz calls Hawkins and complains about lack of offer.
Feb 26, 2005
Hawkins writes complaint letter to Major.
Mar 24, 2006
Hawkins calls Remetz and curses at him.
Feb 21, 2005 1:30 p.m.
Hawkins leaves voice mail for Remetz
Mar 12, 2005 to Apr 1, 2006
Remetz works at ABI.
Remetz's Version

## ⊟ To send facts, documents, or events to TimeMap

Do either of the following:

- Send a group of facts. Filter the Facts spreadsheet to display only the facts you want to chart. Then click **Reports** > **Send Current View To** > **LexisNexis TimeMap**.
- Send individual facts. In the Facts spreadsheet, right-click a fact record. Then click **Send To** > **LexisNexis TimeMap** > **Current Record**.

You can make timeline graphs in TimeMap from records sent from the Documents and Events spreadsheets in CaseMap. Filter the spreadsheet to show the records you want to send. Make sure the Date field is visible in the spreadsheet view, then click **Reports** > **Send Current View To** > **LexisNexis TimeMap**.

To learn more about TimeMap or download a trial version, check out the Time Map information page on the LexisNexis website, or contact your LexisNexis Sales Representative.

Related Topics

[Using CaseWide](#)
[Analyzing and linking facts](#)

## Using CaseWide Fact Timelines

The CaseWide timeline has scales that display at both ends of the graph. These scales are determined by finding the bar representing the greatest number of facts and then rounding up to the next logical scale value. For example, if the tallest bar represents 93 facts, the top scale value would round to 100.

For optimal viewing, CaseWide's fact bars have a minimum height, but that does not mean the data calculated is the same for each bar. Two bars with the same height may represent different numbers of facts. Be certain to click on each bar to display a popup of the number of facts for each. Only time periods with a fact bar are included in the average calculation.

The CaseWide graph has a minimum display height of half an inch, but you can drag the split bar down to increase viewing size.

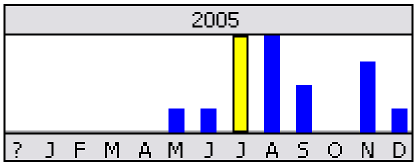
CaseWide also includes a separate graph to track Fuzzy month and day calculations with a status of To Be Determined, Not Applicable, and Unknown? for fact records. This graph displays at the far right of the CaseWide timeline. These bars are labeled T, N, and ?, respectively. And although the bars scale independently from the bars in the principal CaseWide timeline, they do scale relative to each other. To open/close the graph display, click the T N ? button.

### ⊟ To view the CaseWide timeline

1. Click on the **Facts** spreadsheet in the **Favorites** pane.
2. On the **View** tab, select the **View CaseWide** check box.

   The CaseWide timeline opens at the top of the Facts spreadsheet.

3. On the far right of the graph, click the **Y**, **M**, or **D** buttons Y M D to view the graph by year, month, or day.
4. Click on a fact bar to view the number of facts for that time period.

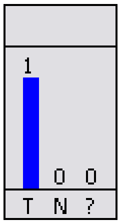
   

   The selected fact bar turns yellow and a popup displays the number of facts records for the month or day.

5. Double-click on a fact bar to display fact records for that month or day in a list dialog box, which you can print.

6. Click on the **T N ?** button to open/close the graph the date status of **To Be Determined**, **Not Applicable**, and **Unknown ?**.

7. In the **T N ?** graph, click on a bar to view the number of facts for each status.

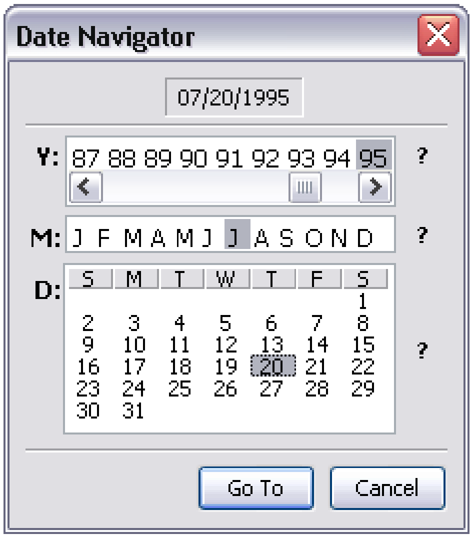


Click on a fact bar to display a popup of the number of facts for each. Double-click on a fact bar to display the records in a list dialog box that you can print.

8. Click on the **Gridlines** button to display a gray gridline across the timeline.

9. Click on the **Average Timeline** button to display a red gridline across the timeline.

10. Click on the **Date Navigator** button to open the Date Navigator box.


Date Navigator
07/20/1995
Y: 87 88 89 90 91 92 93 94 95
?
M: J F M A M J J A S O N D
?
D: S M T W T F S
1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30 31
?
Go To
Cancel

The Date Navigator box allows you to jump to a specific date in your case timeline by selecting a particular day, month, and year.

You can also use the scroll bar below the timeline to navigate dates.

10. Click the **View CaseWide** button ☑ CaseWide to hide the timeline from display when you are finished.

Related Topics

[About CaseWide]

Analyzing and linking facts

# *Sorting and Filtering Data*

## About sorting

Sorting determines the order case elements display in a spreadsheet view, allowing you to review information in various ways to determine what items need to be addressed first or categorized based on the status of items. Sorting is distinct to each user ID and does not affect the view that others see for this spreadsheet.

You can also sort multiple fields to change your spreadsheet view. For example, you can sort the Questions spreadsheet first by persons to whom questions are assigned, and then by the date an answer is due. You must use the Advanced Sort dialog box to create a multi-level sort. For more information, see Sorting multiple fields.

***You can sort spreadsheet data by:***

- Change a field's ascending or descending order
- Change your spreadsheet view by inserting or hiding fields
- Sorting multiple fields at a time (up to three fields)

***Benefits of sorting spreadsheet fields include:***

- Creating/saving a spreadsheet view for printing reports
- Viewing disputed vs. undisputed facts by date and time to analyze case strategy
- Sorting the Questions spreadsheet before a trial date to evaluate outstanding issues
- Sorting objects by type and then alphabetically to locate people, organizations, and documents easier
- Plus many more

Sorting is independent of any filter or tag function. If you filter the facts displayed in the Facts spreadsheet from 2,000 to 100, the 100 facts that remain are still sorted as specified by the view's sort order.

### ⊟ Review sortable vs. non-sortable fields

While you can sort of most all fields in a spreadsheet, some fields in CaseMap (such as description fields) cannot be sorted. If you try to sort a field that cannot be sorted, you receive a message prompt indicating what fields on the spreadsheet are available for sorting.

Reference the following table to note what spreadsheet fields are sortable and which are not.

| Sorting Fields | |
|---|---|
| **Sortable** | **Non-sortable** |
| Date & Time | Fact Text |
| Check box | Source(s) |
| Evaluation | Description fields |
| List | Question Text |
| Numeric | Linked Issues (Facts) |
| Text | Linked Elements (Questions) |
| | # (Number fields) |

### Sort to create custom views

Sort spreadsheets to create custom views that are distinct to your user ID. Once you sort a spreadsheet it is automatically saved in this view. Each time you open a case, the spreadsheet data display in this new view until you change the sort order again.

Not only can you save a sort order, you can also rearrange spreadsheet fields to display in the order you prefer. For more information, see Creating spreadsheet views.

### Clear a sorted view to reset a spreadsheet

Once you sort a spreadsheet it is automatically saved in this view. Each time you open a case, the spreadsheet data display in this new view until you change the sort order again.

Related Topics

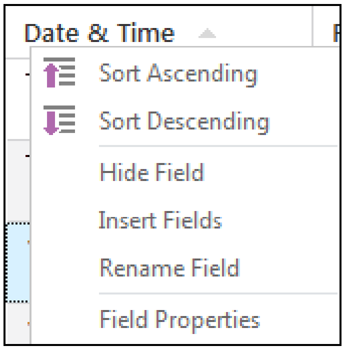
Changing the field sort order
Sorting multiple fields

## Changing the field sort order

Sorting the field order determines how records in a spreadsheet visually display. For example, when you create a new case the Facts spreadsheet defaults to a Date & Time sort order with facts listed in chronological order. When you want to look at your spreadsheet from a chronological or status type view, simply change the ascending/descending order of the field.

## ⊟ To change the field sort order

1. Open the spreadsheet you want to sort.
2. Right-click on the field column and select **Sort Ascending** or **Sort Descending**.


Date & Time
Sort Ascending
Sort Descending
Hide Field
Insert Fields
Rename Field
Field Properties

Sort Ascending displays data from A to Z, least to greatest.

Sort Descending displays data from Z to A, greatest to least.

Notice that when you change a field's sort order, an arrow displays in the column header pointing up or down to show the current order.

## ⊟ To sort facts by status type

1. In the **Case Shortcuts** pane, click on the **Facts** spreadsheet icon.

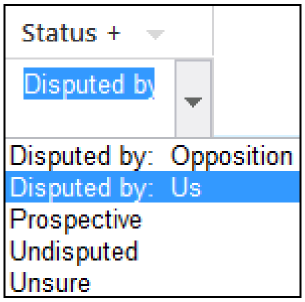
   Notice that by default your facts are sorted in ascending order.

2. Right-click on the **Status** field header and select **Sort Descending**.

   Notice that all your fact records now sort according to Undisputed, Prospective, Disputed by: Us. and Disputed by: Opposition, or other status types used by case staff.

   Any facts that have not been given a status type automatically sort to the bottom of the spreadsheet.

3. To apply a status type to an unmarked fact, click in the **Status** cell for a record and then click the down arrow within it to select the type.


Status +
Disputed by
Disputed by: Opposition
Disputed by: Us
Prospective
Undisputed
Unsure

Related Topics

[About sorting]

[Sorting multiple fields]

## Sorting multiple fields

You can sort multiple fields (up to three levels) to change your spreadsheet view. For example, you can sort the Questions spreadsheet first by persons to whom questions are assigned, and then by the date an answer is due. You must use the Advanced Sort dialog box to create a multi-level field sort.

In a multi-level sort, your primary sort is the first choice of the three select in the Advanced Sort dialog box. When you use multiple fields to sort a view, the elements in it are grouped by the values of your primary sort field. Then, the elements in each of these groups are further organized using the values of your second and third sort selections.

Once a spreadsheet is sorted, it remains in this order for your personal view even when closing the case. To change the spreadsheet view, you will need to perform a new sort. Your sort order does not affect the view that others see for this spreadsheet.

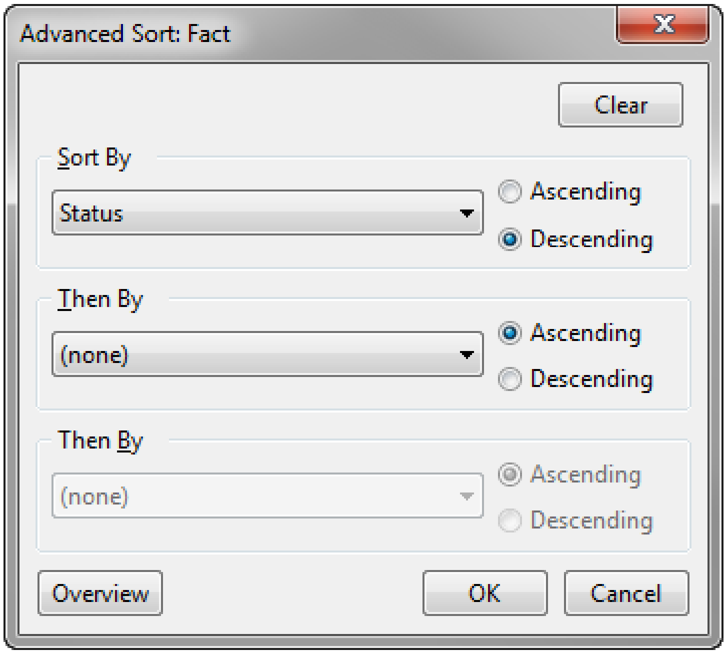
### ⊟ To sort by multiple fields

1. In the **Case Shortcuts** pane, click on the **Facts** spreadsheet icon.
2. On the **Home** tab, click the **Sort & Filter** button, and then click **Advanced Sort**

Advanced Sort...

.

   You may need to add this button to the toolbar.
3. In the **Advanced Sort** dialog box, click on the primary sort option in the **Sort By** drop-down listing.



Sort By: Status, ● Descending

Then By: (none), ● Ascending

Then By: (none), ● Ascending

4. Select **Ascending** or **Descending** for the sort order you want for the primary sort option.

5. In the **Then By** drop-down listing, click the secondary sort option.

6. Select **Ascending** or **Descending** for the sort order you want for the secondary sort option.

7. In the next **Then By** drop-down listing, click on the third sort option.

8. Select **Ascending** or **Descending** for the sort order you want for the third sort option.

9. Click **OK** to sort the spreadsheet in the order selected.

10. Return to the spreadsheet to verify the new sorted view.

### ⊟ To sort facts by status type and date and time

A common fact sort includes sorting records in the Facts spreadsheet by disputed status and then by date and time. Once records are sorted by selection, you can always reference the order by checking the numeric indicators in the field headers.

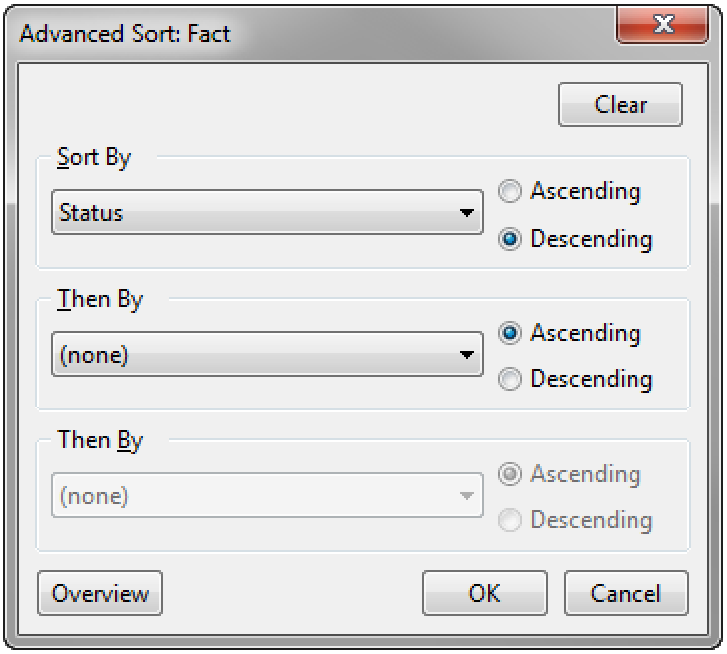
1. In the **Case Shortcuts** pane, click on the **Facts** spreadsheet icon.

   Notice that the default sort order of facts records is by date and time, with the To Be Determined records sorting to the top.

   Also notice the the field headers display a 1 in the Date & Time field and 2 in the Status field to denote the current sort order.

2. On the **Home** ribbon, click the **Sort & Filter** button, and then click **Advanced Sort** Advanced Sort... .

3. In the **Advanced Sort** dialog box, click on **Status** in the **Sort By** drop-down listing.



Advanced Sort: Fact

Sort By: Status ○ Ascending ● Descending

Then By: (none) ● Ascending ○ Descending

Then By: (none) ● Ascending ○ Descending

4. Select **Descending** so that **Undisputed** records display first and all records with no status sort to the bottom of the spreadsheet.

5. In the **Then By** drop-down listing, click **Date & Time** and select **Ascending** so that dates filter from oldest to newest.

6. Click **OK** to sort the **Facts** spreadsheet.

   Notice that the spreadsheet now sorts by disputed status first, and then by date and time. Also notice that the numbers in the field headers changed once the sort was performed.

### To sort all objects in alphabetical order, then by type

The All Objects spreadsheet contains all people, organizations, documents, etc., in the case. This spreadsheet is sorted by default for object type first, then by full name. If you sort the spreadsheet by full names, you can view all objects in alphabetical order. If you then sort the spreadsheet by object type, you can view the objects grouped in alphabetical order.

1. In the **All Shortcuts** pane, click on the **All Objects** spreadsheet icon.

2. Right-click on the **Full Name** header field and select **Sort Ascending** to first view all objects by full name.

   Notice the the spreadsheet now sorts by alphabetical order by the Full Name field and the the Object Type values are not in any definitive sort order.

3. Right-click on the **Object Type** header field and select **Ascending** to view objects grouped in alphabetical order.

   Notice that the spreadsheet now sorts by the Object Type field, and the Full Name field is no longer in alphabetical order.

4. To return to the original sort sequence for this spreadsheet, on the **Home** ribbon, click

the **Sort & Filter** button, and then click **Advanced Sort** Advanced Sort....

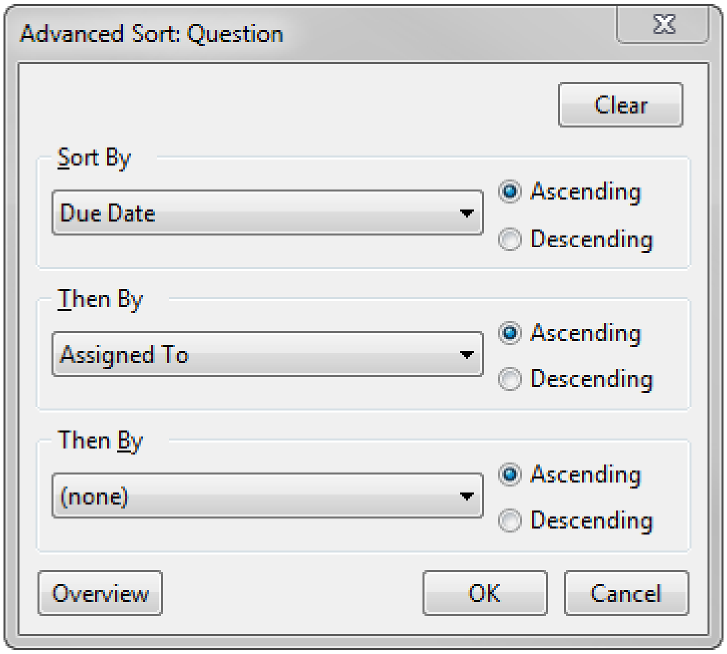
5. In the **Sort By** drop-down listing, click **Object Type** and select **Ascending**.
6. In the **Then By** drop-down listing, click **Full Name** and select **Ascending**.
7. Click **OK** to resort the **All Objects** spreadsheet.

   Notice that the spreadsheet now sorts by object type first, then by full name.

### ⊟ To sort questions by criticality status

Sorting the Questions spreadsheet is useful when trial dates approach and you want to wrap up outstanding items sorted by due date, completion, and criticality.

1. In the **All Shortcuts** pane, click the **Questions** spreadsheet icon to view all tasks and questions listed.
2. On the **Home** ribbon, click the **Sort & Filter** button, and then click **Advanced Sort** Advanced Sort....



Advanced Sort: Question

Sort By: Due Date ● Ascending ○ Descending

Then By: Assigned To ● Ascending ○ Descending

Then By: (none) ● Ascending ○ Descending

3. In the **Sort By** drop-down listing, click **Due Date** so that all questions are sorted first by the original due date.
4. Select **Ascending** for this option to keep the order of the dates organized by upcoming deadlines first.
5. In the **Then By** drop-down listing, click **Criticality** for the secondary sort option and then select **Ascending** to ensure the most crucial questions sort to the top of the list.
6. In the next **Then By** drop-down listing, click **Answer Status** as the third sort option and then select **Descending** to sort items already addressed to the bottom.

7. Click **OK** to sort the **Questions** spreadsheet.

8. Review how your questions resorted first by due date, then by critical and completion statuses.

   Notice that the column headers of each field display the numerical sort order you selected. You can now tackle your outstanding items with a clear plan in place.

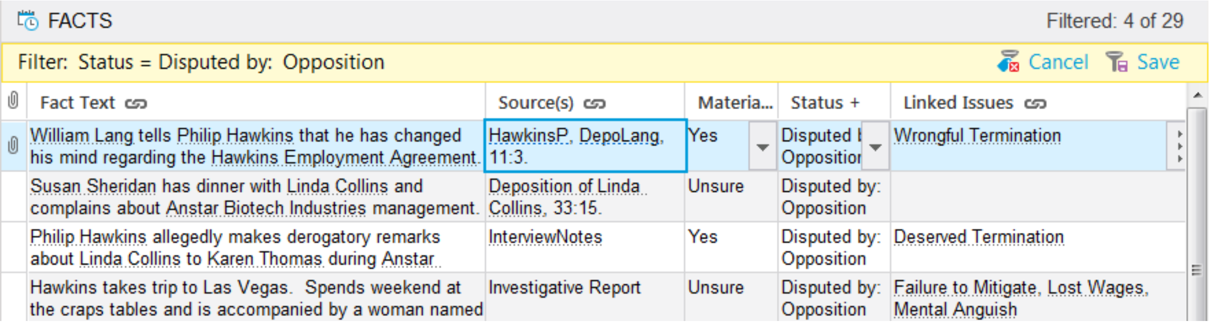
Related Topics

About sorting
Changing the field sort order

## About filtering

Filtering in CaseMap allows you to cull data to produce reports or save filters to rerun later when more information is added to the case. Records that meet the criterion of your filter remain in view on the current spreadsheet; while other records are temporarily hidden from view.

When you run a filter, a Filter status bar displays at the top of the spreadsheet pane, indicating what filter(s) you have in place and the number of records filtered. The Cancel and Save buttons are located here too.



FACTS

Filtered: 4 of 29

Filter: Status = Disputed by: Opposition

| Fact Text | Source(s) | Materia... | Status + | Linked Issues |
|---|---|---|---|---|
| William Lang tells Philip Hawkins that he has changed his mind regarding the Hawkins Employment Agreement. | HawkinsP, DepoLang, 11:3. | Yes | Disputed Oppositio | Wrongful Termination |
| Susan Sheridan has dinner with Linda Collins and complains about Anstar Biotech Industries management. | Deposition of Linda Collins, 33:15. | Unsure | Disputed by: Opposition | |
| Philip Hawkins allegedly makes derogatory remarks about Linda Collins to Karen Thomas during Anstar | InterviewNotes | Yes | Disputed by: Opposition | Deserved Termination |
| Hawkins takes trip to Las Vegas. Spends weekend at the craps tables and is accompanied by a woman named | Investigative Report | Unsure | Disputed by: Opposition | Failure to Mitigate, Lost Wages, Mental Anguish |

***There are three main types of filters:***

- **Instant Filter** — Use for simple filters like a key word or phrase, such as filtering the Facts spreadsheet to only display undisputed fact records. Simply right-click on any field data and click Filter by Selection.
- **Guided Filter** — Use Filter menu options to run pre-built filter provided by CaseMap or access your own saved filters.
- **Advanced Filter** — Use the Advanced Filter pane to construct and save multi-level filters using operators to narrow results as well as edit and save complex filters.

***Examples of filters include:***

- Key word (person or organization name, etc.)
- Field status setting (Undisputed and/or Material relevance)
- Multi-level filters (combining one or more criteria, even mixing key words with field status settings)

## ⊟ Access filter tools from three locations

***The Filter menu is accessible from the Editing menu:***

- From the Home ribbon, go to the Editing menu > Sort & Filter > Filter shortcut menu

***The Advanced Filter pane is accessible by selecting:***

- From the Home ribbon, go to the Editing menu > Sort & Filter > Advanced Filter

The Advanced Filter pane allows you to create multi-level filters and tag records produced in the results.

For more information, see Performing advanced filters.

## ⊟ Use operators to narrow filter results

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

***Advanced Filtering uses two types of operators:***

- **Boolean** — Instant and Advanced Filter pane
- **Relational** — Advanced Filter pane

### ⊟ Using Boolean operators

Using the Combining Two Filters box, you can select whether to use the AND and OR operators. The Venn diagram in the dialog box updates to illustrate the impact your decision will have in gathering data. If you run a filter on a spreadsheet that has already been filtered, the dialog box asks you whether you want to ignore the previous filter or run the previous filter with an additional layer of criteria using the AND or OR operators.

You can edit the filter criterion of a combined filter in the Advanced Filter pane by right-clicking on the filter or clicking the Edit button, and then selecting new operator criteria.

**Boolean Search Operators**

| Operator | Query | Results |
|---|---|---|
| AND contains both words | HawkinsP AND LangW | All documents with both the words: HawkinsP and LangW. A more stringent filter. |

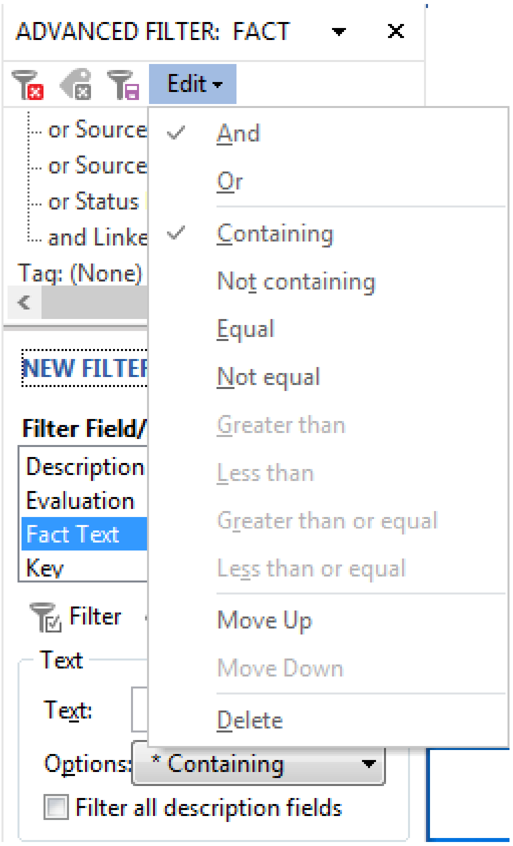
**Boolean Search Operators**

| Operator | Query | Results |
|---|---|---|
| OR contains either word | HawkinsP OR LangW | All documents with either HawkinsP or LangW, or both. A less stringent filter. |

## Using Relational operators

Relational operators are easy to use with symbols or short abbreviations with each producing the same results. When performing a relational filter, you want to select the field first, then type the data value you are searching.

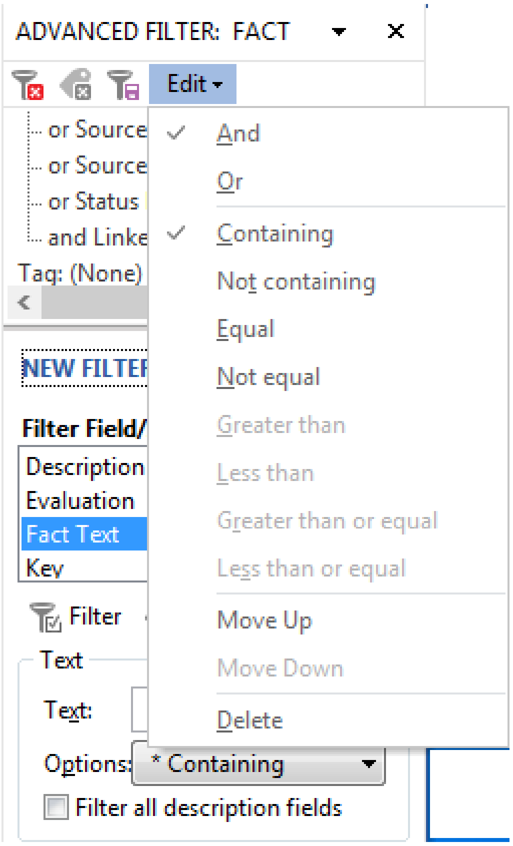
**Relational Filter Format:** field name + OPERATOR data value


ADVANCED FILTER: FACT
Edit
or Source
or Source
or Status
and Linke
Tag: (None)
NEW FILTER
Filter Field/
Description
Evaluation
Fact Text
Key
Filter
Text
Text:
And
Or
Containing
Not containing
Equal
Not equal
Greater than
Less than
Greater than or equal
Less than or equal
Move Up
Move Down
Delete
Filter all description fields

Options: * Containing

## Combining operators for advanced filters

You can use both Boolean and Relational operators to create advanced filters by selecting a filtered Boolean search in the Advanced Filter pane and then further applying relational operators to isolate the results. To do this, open the Advanced Filter pane and select a filter in the Filter: (Active) listing. Next right-click and select the relational operator you want to apply.


ADVANCED FILTER: FACT
Edit
or Source
or Source
or Status
and Linke
Tag: (None)
NEW FILTER
Filter Field/
Description
Evaluation
Fact Text
Key
Filter
Text
Text:
Options: * Containing
☐ Filter all description fields
✓ And
Or
✓ Containing
Not containing
Equal
Not equal
Greater than
Less than
Greater than or equal
Less than or equal
Move Up
Move Down
Delete

Related Topics

[Basic filtering]
[Guided filters]
[Saving filters]
[Advanced filtering]

## Basic filtering

CaseMap has two basic filtering types that allow you to quickly locate a key word or phrases in a field or filter records by type in a spreadsheet.

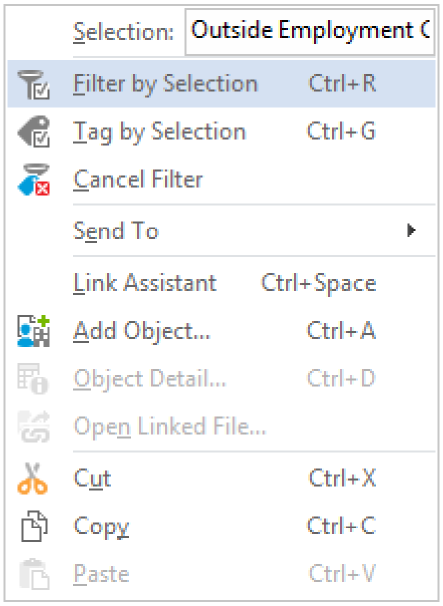
***Basic filtering includes two types:***

- Key word filters in a field (up to 37 levels deep)
- Filtering spreadsheet records by a selection

### To filter by a key word in a field

You can run key word filters up to 37 levels deep, though any more than three is probably unnecessary. If you type in a root word, your results will capture all instances of this entry. For example, if you enter "sale", your results will also include all instances of "sales".

1. In the **Case Shortcuts** pane, click on the icon for the spreadsheet you want to use.
2. Right-click in a field you want to filter.
3. In the shortcut menu, type in the key words you want to locate in the **Selection** field, then click **Filter by Selection**.



Selection: Outside Employment (

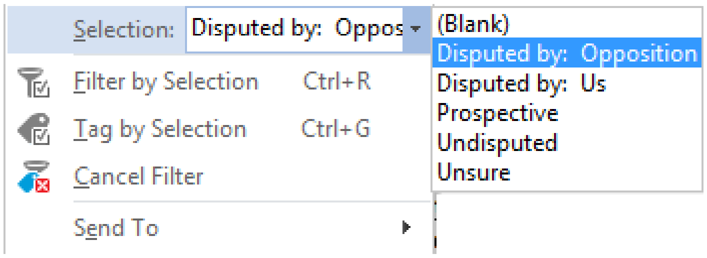
Filter by Selection Ctrl+R
Tag by Selection Ctrl+G
Cancel Filter
Send To
Link Assistant Ctrl+Space
Add Object... Ctrl+A
Object Detail... Ctrl+D
Open Linked File...
Cut Ctrl+X
Copy Ctrl+C
Paste Ctrl+V

Notice that the records in your spreadsheet are now reduced to only those that contain the key words you entered.

4. On the **Filter** status bar, click the **Cancel** button to refresh the spreadsheet and run a new filter.

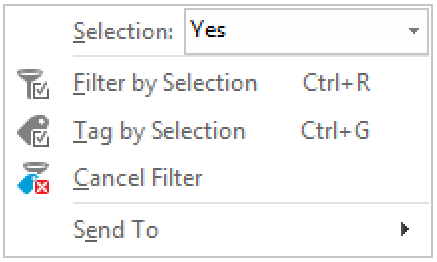
### To filter by field value

1. In the **Case Shortcuts** pane, click on the icon for the spreadsheet you want to use.
2. Right-click in a field you want to filter.
3. In the shortcut menu, click on the field value you want to use as a filter, then click **Filter by Selection**.

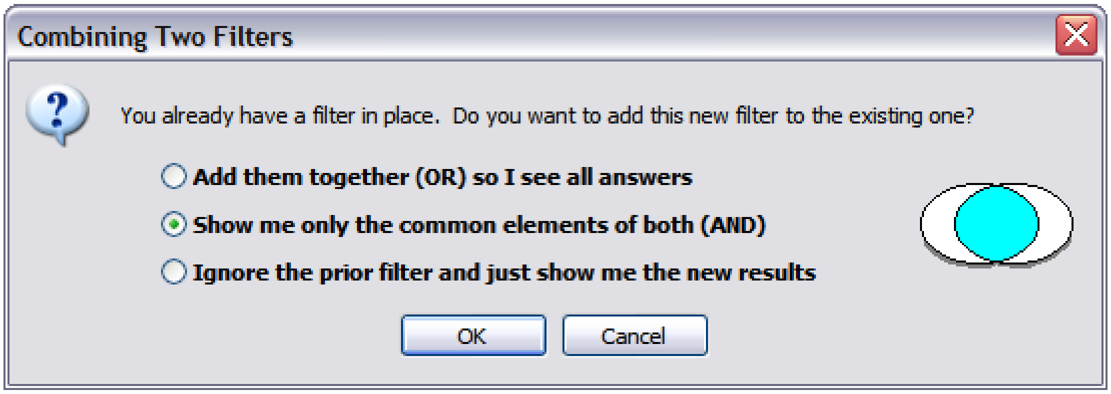

Selection: Disputed by: Oppos
Filter by Selection Ctrl+R
Tag by Selection Ctrl+G
Cancel Filter
Send To
(Blank)
Disputed by: Opposition
Disputed by: Us
Prospective
Undisputed
Unsure

Notice that the number of records displaying in your spreadsheet is now reduced to only those with the field value selection you chose. Also notice that the current filter displays on the spreadsheet title bar.

4. To add another filter to the previous one, right-click in another field and click on a new status.


Selection: Yes
Filter by Selection Ctrl+R
Tag by Selection Ctrl+G
Cancel Filter
Send To

5. In the **Combining Two Filters** dialog box, select the **Show me only the common elements of both (AND)** option, then click **OK**.


Combining Two Filters

You already have a filter in place. Do you want to add this new filter to the existing one?

○ Add them together (OR) so I see all answers
● Show me only the common elements of both (AND)
○ Ignore the prior filter and just show me the new results

OK
Cancel

Notice that only records that contain both filter selections now display in the spreadsheet view.

6. Click the **Save** button on the spreadsheet title bar if you want to save this filter to run again in the future.

7. On the **Filter** status bar, click the **Cancel** button to refresh the spreadsheet.

   Notice that when you refresh the spreadsheet to view all records, the records are still sorted with the primary search selection. To adjust the spreadsheet, change the sort order or run a new filter.

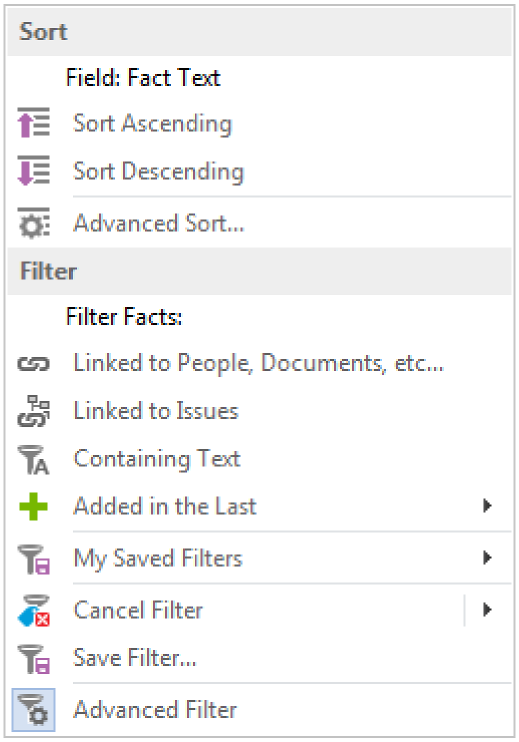
   For more information, see Saving filters and Changing the field sort order.

Related Topics

About filtering
Guided filters
Saving filters
Advanced filtering

## Guided filters

Guided filters are performed by using the pre-built options on the Sort & Filter menu. These filter options are primarily the same for all spreadsheets. Whichever spreadsheet is active is the basis of the filter. For example, if you are on the Facts spreadsheet, and select Linked to Issues, the results include all facts linked to issues. If you are on the Questions spreadsheet and select Linked to Issues, the results include all questions linked to issues.


Sort
Field: Fact Text
Sort Ascending
Sort Descending
Advanced Sort...
Filter
Filter Facts:
Linked to People, Documents, etc...
Linked to Issues
Containing Text
Added in the Last
My Saved Filters
Cancel Filter
Save Filter...
Advanced Filter

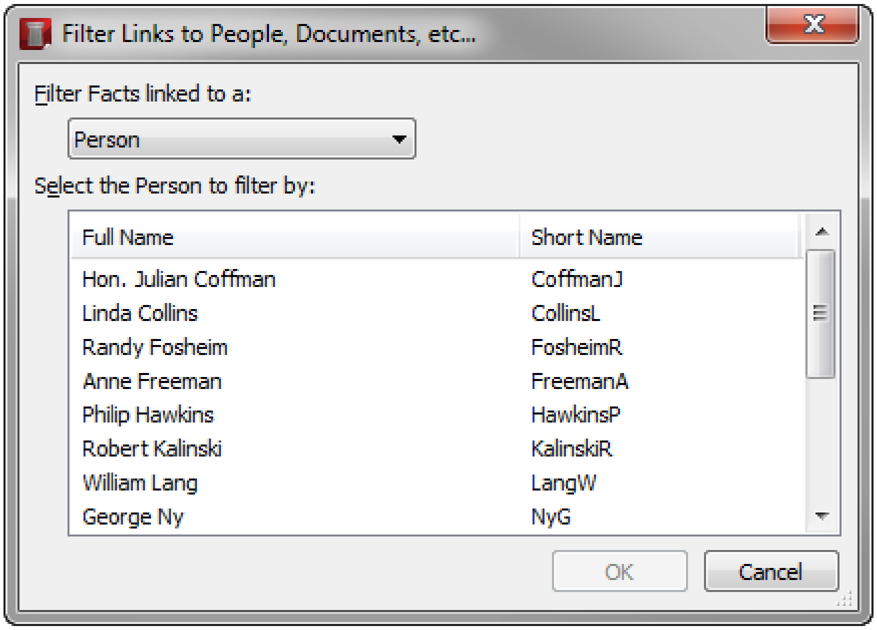
⊟ **To review the Filter menu options**

The following table provides a description of Filter menu option.

| Filter Menu Options | |
|---|---|
| **Filter** | **Description** |
| Linked to People, Documents, etc. | Locates all records linked to objects. |
| Linked to Issues | Locates all records linked to issues, including sub-level issues. |
| Containing Text | Locates selected text in all description fields or a designated field of choice. |
| Added in the Last | Locates all new information added to a spreadsheet in the last day/week/month/three months. |
| My Saved Filters | Re-runs filters that you save for personal use. |
| Cancel Filter | Cancels the current filter you are running. |
| Save Filter | Saves the filter to your My Saved Filters menu. |
| Advanced Filter | Opens the Advanced Filter pane. |

### ⊟ To filter records linked to people, documents, etc.

1. In the **Case Shortcuts** pane, click the icon for the spreadsheet you want to use.
2. On the the **Home** tab, click **Sort & Filter**, and then click **Linked to People, Documents, etc.**
3. In the **Filter Links to People, Documents, etc.** dialog box, click on a sub-level spreadsheet in the **Filter [records] linked to a** list.



Filter Facts linked to a: Person

Select the Person to filter by:

| Full Name | Short Name |
|---|---|
| Hon. Julian Coffman | CoffmanJ |
| Linda Collins | CollinsL |
| Randy Fosheim | FosheimR |
| Anne Freeman | FreemanA |
| Philip Hawkins | HawkinsP |
| Robert Kalinski | KalinskiR |
| William Lang | LangW |
| George Ny | NyG |

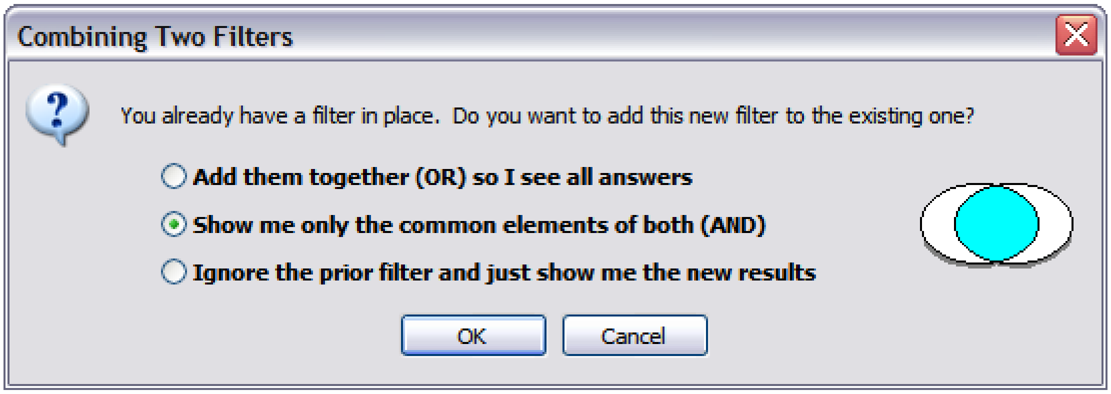
4. In the **Select an [object] to filter by** box, click on the object you want and then click **OK**.

   Notice that all spreadsheet records are reduced to only those linked to the object you selected.

5. To add another layer to the filter, click on the **Editing** menu again, click **Sort & Filter** and then click **Linked to People, Documents, etc**.

6. In the **Filter Links to People, Documents, etc.** dialog box, select another object spreadsheet and another specific object, then click **OK**.

7. In the **Combining Two Filters** box, select a filter option, then click **OK**.



You already have a filter in place. Do you want to add this new filter to the existing one?

○ Add them together (OR) so I see all answers
● Show me only the common elements of both (AND)
○ Ignore the prior filter and just show me the new results

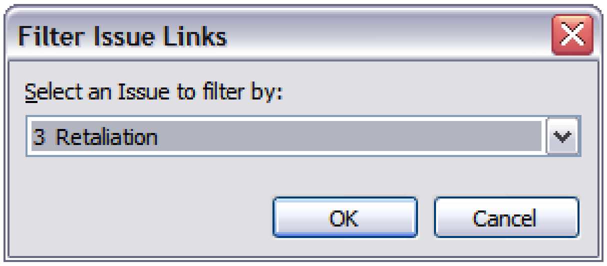
Notice that the spreadsheet records are now further reduced to only those than meet the filter criteria specified.

## To filter records linked to issues

1. In the **Case Shortcuts** pane, click the icon for the spreadsheet you want to use.

2. On the **Home** tab, click **Sort & Filter**, and then click **Linked to Issues**.

3. In the **Filter Issue Links** box, click on the issue you want to filter in the drop-down listing, then click **OK**.



4. If the issue you selected includes sub-level issues, click **Yes** to include them in the filter.

   Notice that the spreadsheet now displays only those records linked to the selected issue and any corresponding sub-issues.

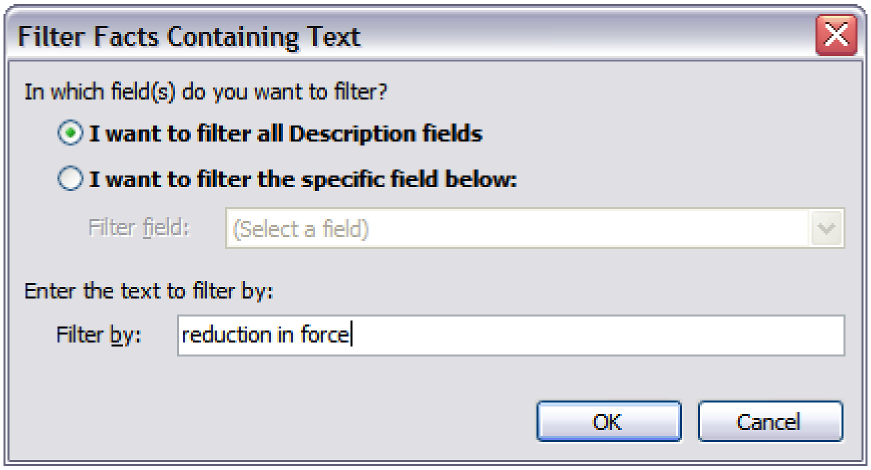
### ⊟ To filter fields that contain specific text/status

There are two options for filtering for text within a field: description or specific fields. You can choose to keep your filter focused on all description text or you can specify a particular field to narrow your results. For example, you may want to filter to locate a person in a specific field. Or, perhaps you want to filter a field for a specific status.

1. In the **Case Shortcuts** pane, click the icon for the spreadsheet you want to use.

2. On the **Home** tab, click **Sort & Filter**, and then click **Containing Text**.

3. In the **Filter [*object type here*] Containing Text** dialog box, select which field you want to filter.



Filter Facts Containing Text

In which field(s) do you want to filter?

● I want to filter all Description fields

○ I want to filter the specific field below:

Filter field: (Select a field)

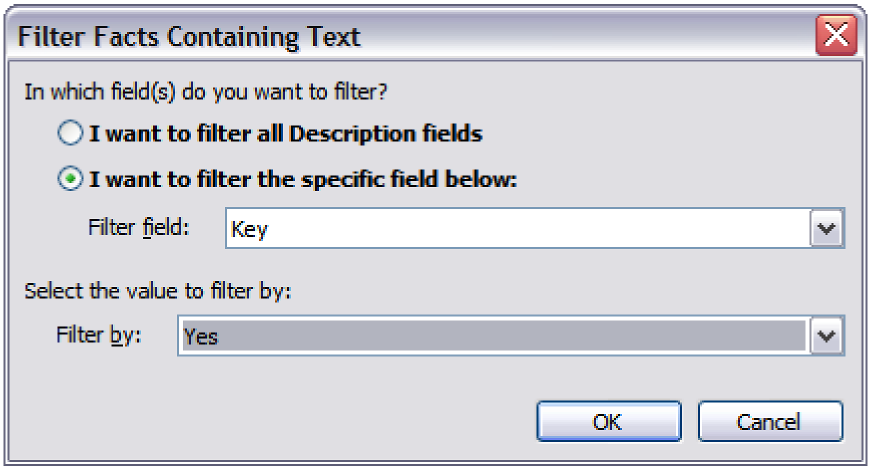
Enter the text to filter by:

Filter by: reduction in force

4. In the **Filter by** field, type the text you want to locate, then click **OK**.

   Notice that all records are now reduced to only those containing the specified text in the field selected.

5. To filter by field status, you would select I want to filter the specific field below, and then click on the field in the **Filter by** list.


Filter Facts Containing Text
In which field(s) do you want to filter?
○ I want to filter all Description fields
● I want to filter the specific field below:
Filter field: Key
Select the value to filter by:
Filter by: Yes
OK
Cancel

6. In the **Filter** by field, click on the status you want to filter, then click **OK**.

### To filter new records added in the last day/week/month

The filter for Added in the last options is a pre-built filter for locating case records updates. You can also search What's New in the Advanced Filter pane.

1. In the **Case Shortcuts** pane, click the icon for the spreadsheet you want to use.
2. On the **Home** tab, click **Sort & Filter**, and then click **Added in the last**.
3. In the shortcut menu, select **Day**, **Week**, **Month**, or **Three Months**.

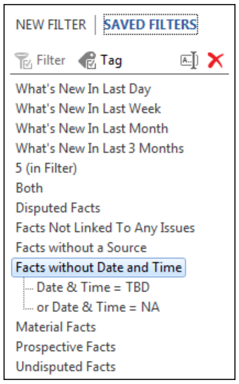
   Notice that the spreadsheet now contains only those records added during the timeframe you selected.

Related Topics

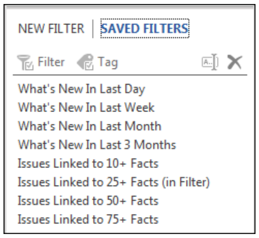
About filtering
Basic filtering
Saving filters
Advanced filtering

## Saving filters

CaseMap provides a listing of pre-built filters for each spreadsheet that are most commonly used to gather a subset of data at a moment's notice. You can also save your own filters to this listing for those you intend to run often or those you have built that are complex. Rerunning saved filters allows you to gather new information from specific angles and helps track information updates throughout the life of the case. Any filters you save are added to your personal My Saved Filters menu. Each set of filters is specific to each spreadsheet.



What's New In Last Day
What's New In Last Week
What's New In Last Month
What's New In Last 3 Months
5 (in Filter)
Both
Disputed Facts
Facts Not Linked To Any Issues
Facts without a Source
Facts without Date and Time
  Date & Time = TBD
  or Date & Time = NA
Material Facts
Prospective Facts
Undisputed Facts



What's New In Last Day
What's New In Last Week
What's New In Last Month
What's New In Last 3 Months
Issues Linked to 10+ Facts
Issues Linked to 25+ Facts (in Filter)
Issues Linked to 50+ Facts
Issues Linked to 75+ Facts

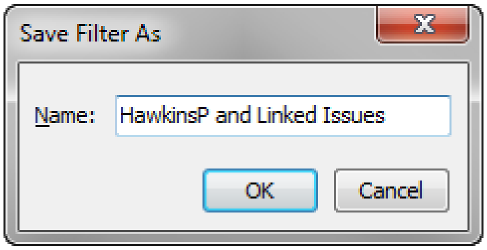
***Saved filters can be accessed from the following locations:***

- Home ribbon > Editing menu > Sort & Filter > My Saved Filters
- Advanced Filter pane > Saved Filters pane (located at the bottom of the pane)

We recommend that you print copies or make reports of filter criteria essential for tracking information regularly. This provides you and other case staff with a reference for these filters.

## To save filters

1. In the **Case Shortcuts** pane, click on the icon for the spreadsheet you want to use.
2. Filter data in the spreadsheet or using the **Advanced Filter** pane.
3. Click the **Save** button on the **Filter** status bar or in the **Advanced Filter** pane.
4. In the **Save Filter As** dialog box, type in the name you want to identify this filter, then click **OK**.



Name: HawkinsP and Linked Issues

The saved filter now displays on the My Saved Filters menu and in the Saved Filters pane of the Advanced Filters pane.

## To rerun saved filters

1. In the **Case Shortcuts** pane, click on the icon for the spreadsheet you want to use.

2. On the **Home** tab, click **Sort & Filter** on the Editing menu.

   You can also click on the Saved Filters bar in the Advanced Filters pane, and then click the Filter button Filter .

3. On the Sort & Filter submenu, click **My Saved Filters**, and then select the filter you want to run.

   Notice that the spreadsheet now contains only those records that meet the saved filter criteria.

> If you are rerunning this filter a week later, you may find that the fact records in the results are more or less than when you first ran the initial filter due to updates or changes in case records.

### To rename or delete saved filters

Renaming or deleting of saved filters is done in the Saved Filters pane in the Advanced Filters pane.

#### To rename a filter

1. In the **Saved Filters** pane, right-click on the filter and click the **Rename Filter** button .

2. In the **Rename Filter** dialog box, type in the new filter name, then click **OK**.

#### To delete a filter

1. In the **Saved Filters** pane, right-click on the filter and click the **Delete Filter** button ✕.

2. In the message box to delete the filter, click **Yes**.

### To cancel filters

A current or active filter can be canceled at any time so a new one can be applied.

- To cancel a filter, click the **Cancel** button on the Filter status bar.
- Or right-click anywhere in the filtered record and then click **Cancel Filter**.

> Rerunning a saved filter automatically cancels any current filters before running the new one.

Related Topics

[About filtering](#)
[Basic filtering](#)

[Guided filters](#)
[Saving filters](#)

## Advanced filtering

The Advanced Filter pane allows you to create filters and tags using all fields in a spreadsheet, including those hidden from view. Most filters benefit from combining filter criteria. Multi-level filters help you isolate information as you track and analyze case progress.

Example: (1) Linked Issue = Fraud AND (2) Status + = Undisputed.

The above example shows how you can create a fact filter composed of two filters. The results contain only undisputed fact records linked to the Fraud issue in the Facts spreadsheet.

In the New Filter pane, you will also find two additional filter selections that are bolded in the Filter Field/Area drop-down listing. What's New provides the ability for precise record updates filters that are limited to a day/week/month/three month timeframe. The All "Fact" Description Fields option limits the filter to only description fields in the Facts spreadsheet.

We recommend you take time to experiment with the filtering and tagging options available in the Advanced Filter pane to gain a deeper understanding of how to use these features to analyze case data. Doing so will not change or delete any case data. As you experiment, be sure to right-click on options to familiarize yourself with the shortcuts available.

Closing the Advanced Filter pane does not cancel any active filters or tag operations. Filters and tags remain active until you cancel them or close the case.

### Learn the Advanced Filter buttons

The following table provides descriptions of the Advanced Filter options.

**Advanced Filter Buttons**

| Button | Name | Use |
|---|---|---|
| Filter | Filter | Use the Filter button to run a filter on selected data in a spreadsheet. This button is available in the Advanced Filter and Issue Linking panes. |
| Tag | Tag | Use the Tag button to mark records that meet certain filter criteria. This button is available in the Advanced Filter pane. |
| Edit ▾ | Edit | Use the Edit button to modify the active filter. |

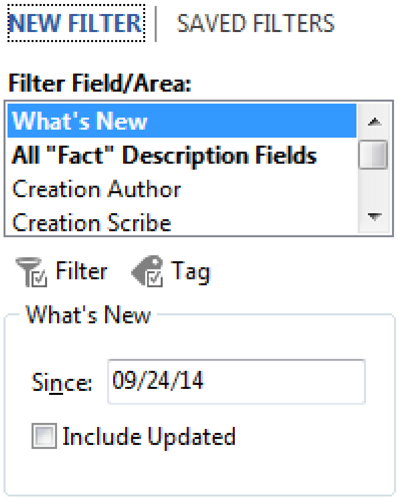
**Advanced Filter Buttons**

| Button | Name | Use |
|---|---|---|
| | 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

Run the What's New filter regularly to ensure you are not missing any case updates, especially when case staff is entering and updating case records.

1. In the **Case Shortcuts** pane, click the icon for the spreadsheet you want to use.
2. On the **Editing** menu of the **Home** tab, click **Sort & Filter**, and then click **Advanced Filter**.



Since: 09/24/14

☐ Include Updated

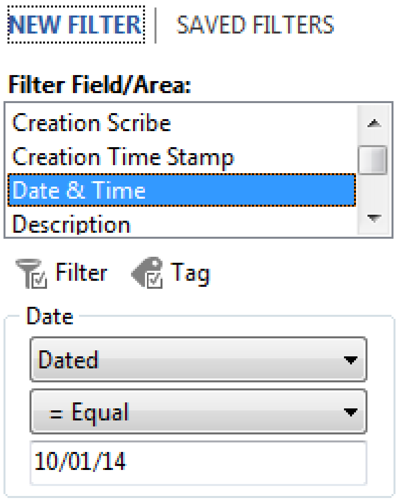
3. In the **New Filter** pane, click **What's New** in the **Filter Field/Area** list.
4. In the **Since** field, type the date.

   All case records entered since the date specified will be included in the results.
5. Select the **Include Updated** check box, if you want to include all records that have been updated since the date specified.
6. Click the **Filter** button Filter to initiate the filter.

You can combine the What's New filter with other filters. For example, you could create a filter that identified new facts that are undisputed.

### To filter fact records for a date

1. In the **Case Shortcuts** pane, click the **Facts** icon to open the spreadsheet.
2. On the **Editing** menu of the **Home** tab, click **Sort & Filter**, and then click **Advanced Filter**.
3. In the **New Filter** pane, scroll to select the **Date & Time** field in the **Filter Field/Area** list.



Date
Dated
= Equal
10/01/14

This field is the basis for your filter.

4. In the **Date** section of this pane, click **Dated** in the first drop-down listing.
5. In the next drop-down listing, click the **= Equal** operator.
6. In the third field, type the date you want to locate.
7. Click the **Filter** button Filter .

   Notice that only records that are equal to the date you entered now display in the Facts spreadsheet.

8. To perform a new filter, click the **Cancel Filter** button .
9. Next search the **Date & Time** field with a **Dated** value of **< Less/Equal** and type in a specific date to filter.

   Notice that the fact records are filtered to only those dates that lead up to or are equal to the date you entered.

10. To perform a new filter, click the **Cancel Filter** button .
11. Next search the **Date & Time** field for records that still need a date applied to them by

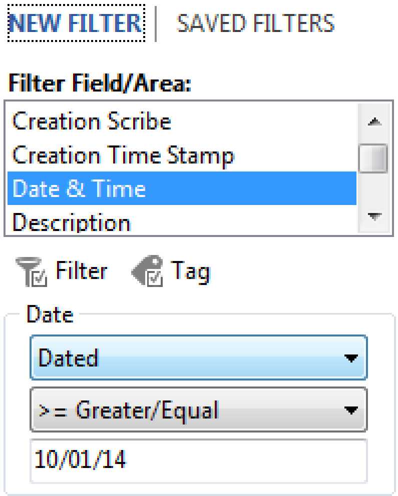
selecting **To Be Determined** in the first drop-down listing.

Filtering the Date & Time field by a given date allows you to review case events down to the seconds, as long as you are entering facts with a time stamp. In the Date & Time field, click on the Ellipsis button to open the Date Stamper. Select the Time tab and adjust the stamp settings to mark an event.

If many events occur on one day, try using a number in the Date & Time field to help sort facts in chronological order in the spreadsheet. This also helps if you don't have times to enter and need an order applied to the events. It is also a method to use if you don't want opposing counsel to know the time.

### To filter fact records with specific to/from dates

1. In the **Case Shortcuts** pane, click the **Facts** icon to open the spreadsheet.
2. On the **Editing** menu of the **Home** tab, click **Sort & Filter**, and then click **Advanced Filter**.
3. In the **New Filter** pane, scroll to select the **Date & Time** field in the **Filter Field/Area** list.



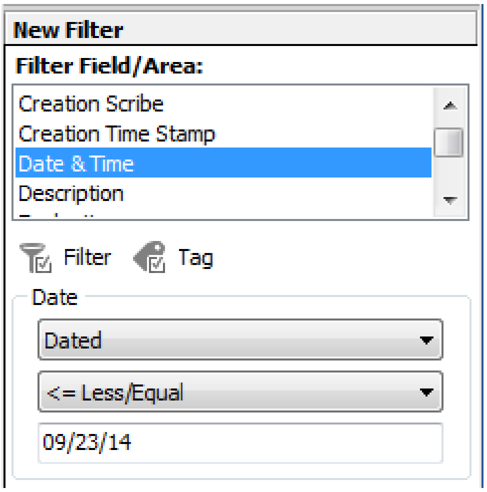
Dated

>= Greater/Equal

10/01/14

4. In the **Date** section of this pane, click **Dated** in the first drop-down listing.
5. In the next drop-down listing, click the **>= Greater/Equal** operator.
6. In the third field, type the beginning date of the fact records you want to locate.
7. To initiate the search, click the **Filter** button Filter .

   Notice that only records that are equal to the date you entered now display in the Facts spreadsheet.
8. With the first filter still running, change the operator to **<= Less/Equal** in the listing.



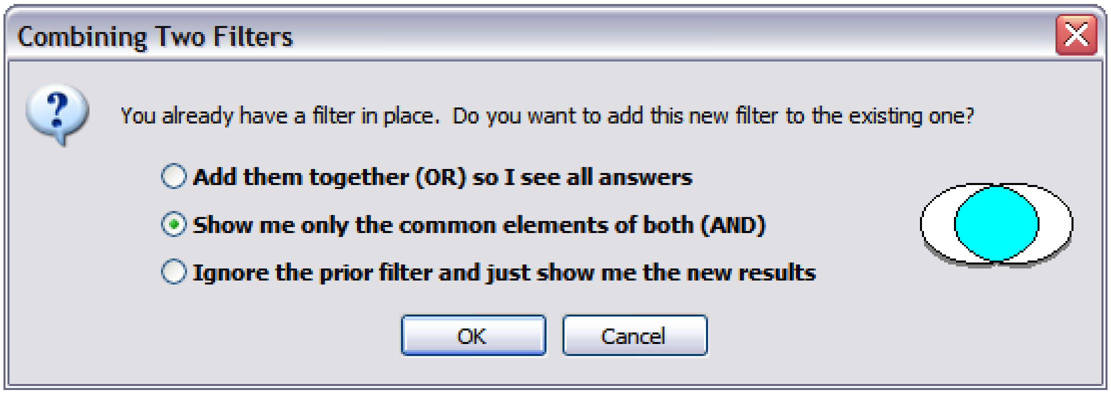
Creation Scribe
Creation Time Stamp
Date & Time
Description

Date
Dated
<= Less/Equal
09/23/14

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

10. Click the **Filter** button Filter .

11. In the **Combining Two Filters** dialog box, select **Show me only the common elements (AND)**, then click **OK**.



You already have a filter in place. Do you want to add this new filter to the existing one?

○ **Add them together (OR) so I see all answers**
● **Show me only the common elements of both (AND)**
○ **Ignore the prior filter and just show me the new results**

Notice that only records within the date range specified now display in the Facts spreadsheet and that the spreadsheet title bar is now updated with the combined search criteria.

12. Click the **Save** button , if you need to rerun this filter again in the future.

13. Click the **Cancel Filter** button to refresh the spreadsheet and run a new filter.

### ⊟ To filter all documents with descriptions

1. In the **Case Shortcuts** pane, click on the **Documents** icon in the **All Shortcuts** pane.

2. Scroll to locate the **Description** field.

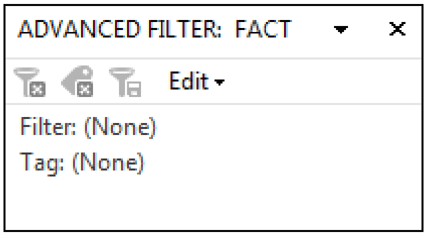
3. Right-click in a blank **Description** cell for a record and click **Filter by Selection**, leaving

the **Selection** field blank.

4. On the **Editing** menu, click **Sort & Filter**, and then click **Advanced Filter** to open the pane.

   Notice that only document records with blank description fields now display in the Documents spreadsheet.

5. In the **Advanced Filter** pane, click on the **Description** filter under **Filter: (Active)**.



Filter: (None)
Tag: (None)

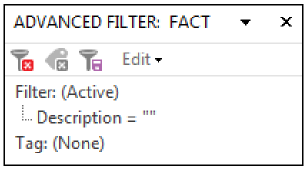
6. Click the **Edit** and then click **Not Equal**.

   Notice that the Documents spreadsheet now displays only those document records that have text in the Description field.

7. To return to viewing all documents without a description, click the **Edit** button and then select **Equal**.

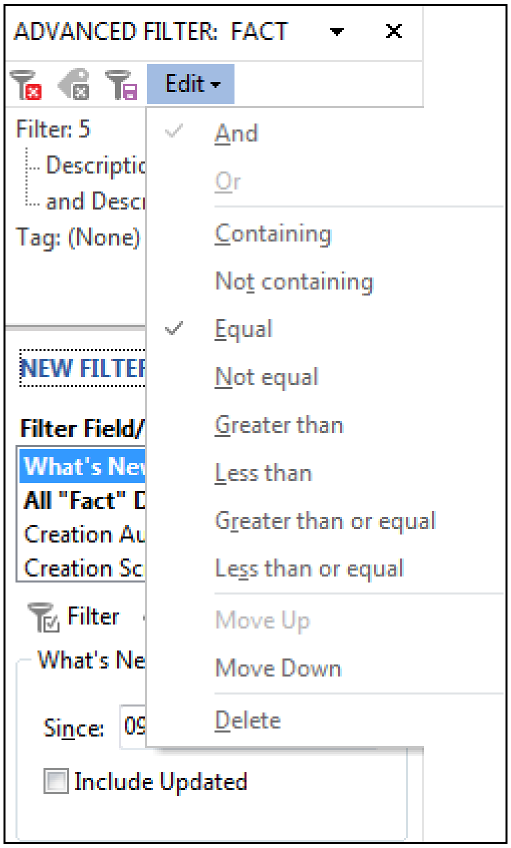
### To edit an advanced filter

1. In the **Advanced Filter** pane, click on the filter under **Filter: (Active)**.



Filter: (Active)
Description = ""
Tag: (None)

2. Click the **Edit** button and then click the new operator you want to use.


ADVANCED FILTER: FACT
Edit
Filter: 5
Descriptio
and Desc
Tag: (None)
NEW FILTER
Filter Field/
What's Nev
All "Fact" D
Creation Au
Creation Sc
Filter
What's Ne
Since: 09
Include Updated
And
Or
Containing
Not containing
Equal
Not equal
Greater than
Less than
Greater than or equal
Less than or equal
Move Up
Move Down
Delete

Notice that the spreadsheet now displays only those records that meet the new filter criteria and that the spreadsheet title bar is updated.

Related Topics

About filtering
Performing basic filters
Performing guided filters
Saving filters

# Search

## About searching

CaseMap allows you to quickly search case data because it automatically creates a comprehensive index during the import process. You can search and locate all instances or "hits" of your search terms in spreadsheet records, linked files, and annotation notes.

Search terms can be more than one word. They can also be numbers, text phrases, or a combined use of terms and search operators. A search term is typed into the Search field with results displaying in the Search Results navigation pane and in the Search Results spreadsheet pane.

You can click on each spreadsheet listed in the Results pane of the Search Results navigation pane to view only those records and linked files that contain your search terms. Search hits found in linked files can be viewed in CaseMap's DocManager file viewer. Search hits found in annotation notes can be previewed in the Search Results spreadsheets pane and viewed in full in DocManager. For more information, see Viewing search results.

***There are two levels of searching in CaseMap:***

- **Basic Searching** — performing single word searches and locating all instances of the term in spreadsheet fields, linked files, and annotation notes.

  For more information, see Running basic searches.
- **Advanced Full-Text Searching** — performing searches with two or more search terms or phrases that gain stronger, precise search results.

  Advanced searches can be also be run in the Full Text Search dialog box, which also allows you to restrict the spreadsheets you want to include in the search.

  For more information, see About full-text searches, Using search operators, and Running full-text searches.

In addition to Basic and Advanced Full-Text search capabilities, CaseMap also provides you with the SmartAssist search assistant. SmartAssist aids you in performing various tasks in CaseMap by allowing you to search for CaseMap user-driven functions using keyword searches to find tasks based on the search parameter.

SmartAssist searches may be performed using:

- single terms — (e.g., linked) to display a list of options and/or tasks that uses the search term 'link'
- phrases — (e.g., print PDF) to display a list of options and/or tasks that uses the search phrase 'print PDF'

For more information, see SmartAssist.

### ⊟ Learn why some words are skipped in searches

When running a search, CaseMap skips the most common words in the English language (and, but, is, if, the). These words are referred to as noise words and are words you would generally not try to locate in a search query.

CaseMap comes with a pre-defined list of noise words that it skips while indexing case information after files are imported. Noise words are automatically excluded from a case index. Eliminating these words from the index ensures that searches run faster and more efficiently.

For more information, see About the case index.

### ⊟ Learn how CaseMap finds more links to objects and issues

The Search Link Assistant finds links to object and issue names matching words in a search query. The Search Link Assistant is a new feature in CaseMap v10.1+.

On rare occasions, a search term may match too many object or issue names to allow expanding the search. If this happens, you should modify the search term to be more specific (such as eliminating wildcards) to limit the number of matches in your search results. For example, a search for haw* may locate too many matching object and issue names. You could then modify the search to hawkins to limit the number of search hits.

### ⊟ To disable the Search Link Assistant

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click the **Searching** tab.
3. Clear the **Enable Search Link Assistant for full-text searching** check box.
4. Click **OK** to save your changes.

Related Topics

Running basic searches
Viewing search results
About full-text searches
Canceling search results
Printing search reports
SmartAssist

## Running basic searches

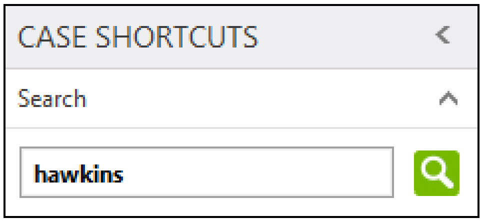
Basic word searches are performed to locate all instances of a single word in spreadsheet fields, linked files, and annotation notes. A search term is typed into the Search field with results displaying in the Search Results navigation pane and in the spreadsheet pane.

Search terms can be more than one word. They can also be numbers, text phrases, or a combined use of terms and search operators. To learn how to write combined search queries, see About full-text searches, Using search operators, and Writing full-text searches.

If you want to search only selected spreadsheets, you need to run a search in the Full Text dialog box. For more information, see Running full-text searches.

### ⊟ To run a basic word search

1. In the **Case Shortcuts** pane, type in your search query in the **Search** field and then click the **Full Text Search** button ➡ or press **ENTER**.

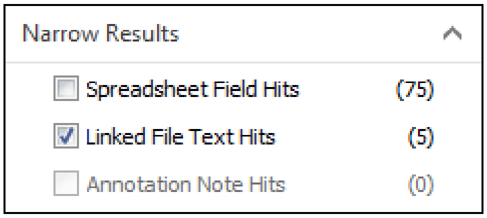


hawkins

The Search Results pane now lists all spreadsheets that include files with search hits. The number of search hits displays for each spreadsheet.

The Search Results window displays records for the first spreadsheet listed.

2. Click the **Narrow Results** bar to open this pane.



☐ Spreadsheet Field Hits (75)
☑ Linked File Text Hits (5)
☐ Annotation Note Hits (0)

3. Select the check box for the search option you want to narrow your results:

   - **Spreadsheet Field Hits** — displays only those records that contain text hits in a field
   - **Linked File Text Hits** — displays only those records that have linked files containing text hits
   - **Annotation Note Hits** — displays only those records that have linked files with annotation notes containing text hits

   The Search Results spreadsheet pane is immediately updated, displaying only those records for the option selected.

   For more information, see Viewing search results.

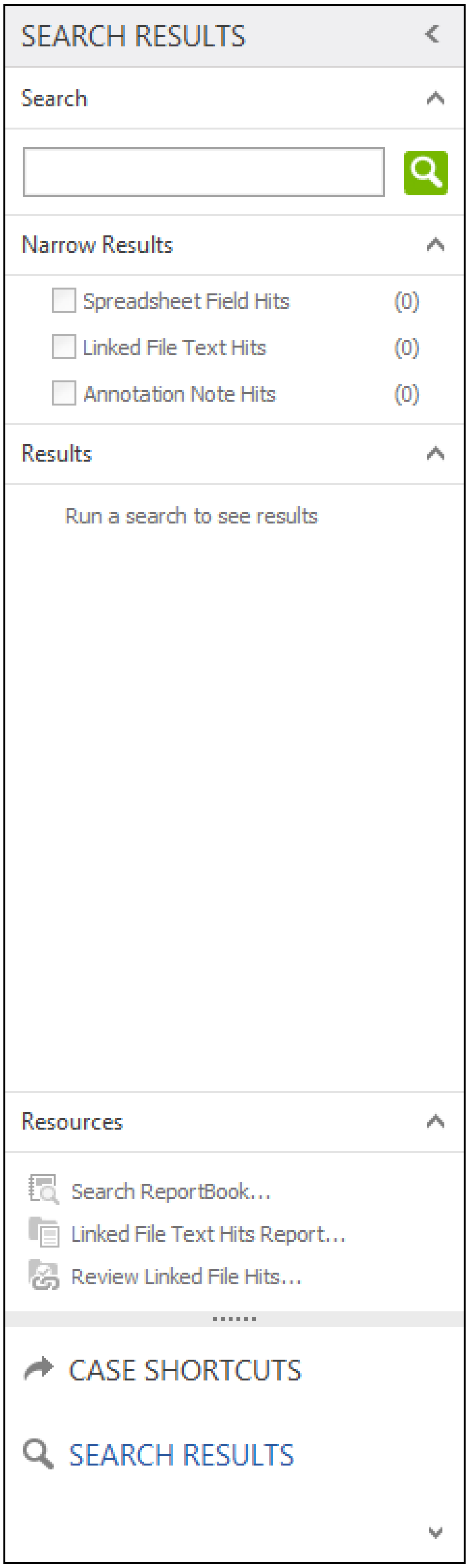
Related Topics

About searching
Viewing search results
About full-text searches

## Viewing search results

After a search is run, search results display in two areas in CaseMap: the Search Results pane and the spreadsheets pane. Search results include matches for field text located in spreadsheet records, text in linked files, and text found in annotation notes for linked files.

⊟ **Learn about the Search Results navigation pane**


SEARCH RESULTS
Search
Narrow Results
☐ Spreadsheet Field Hits (0)
☐ Linked File Text Hits (0)
☐ Annotation Note Hits (0)
Results
Run a search to see results
Resources
Search ReportBook...
Linked File Text Hits Report...
Review Linked File Hits...
CASE SHORTCUTS
SEARCH RESULTS

***The Search Results pane has four parts:***

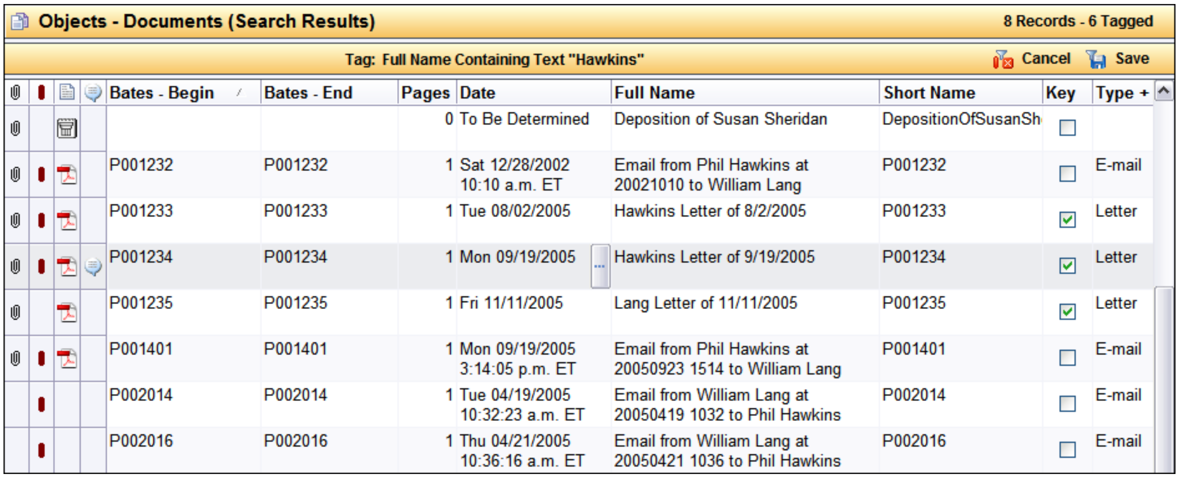
- **Search** field — Allows you to type in full-text search terms (displays in Case Shortcuts pane too).
- **Narrow Results** pane — Allows you to view only those search hits found in spreadsheet fields, linked file text, or annotation note text. The number of search hits found for each displays to the right of the results. Check or clear one or more check boxes to view results for the updated selections.
- **Results** pane — Displays all spreadsheets that contain records or linked files with search hits. The number of search hits located for each displays to the right of the spreadsheet name.
- **Resources** pane — Provides access to three search results reports.

When you are finished viewing your search results, click on the Case Shortcuts button to return to the spreadsheet you were last using. If you click on the Search Results button again, you will see results for the last search query run.

For information about printing search results in reports, see Printing search reports.

## Viewing records with spreadsheet hits

Once a search is run, the spreadsheets pane lists all records and linked files that contain search hits. When you run a search, a status bar displays at the top of the spreadsheets pane, indicating that a search query was run. The status bar displays the number of records located for the spreadsheet you are currently viewing.



Objects - Documents (Search Results) 8 Records - 6 Tagged

Tag: Full Name Containing Text "Hawkins"

| Bates - Begin | Bates - End | Pages | Date | Full Name | Short Name | Key | Type + |
|---|---|---|---|---|---|---|---|
| | | 0 | To Be Determined | Deposition of Susan Sheridan | DepositionOfSusanSh | ☐ | |
| P001232 | P001232 | 1 | Sat 12/28/2002 10:10 a.m. ET | Email from Phil Hawkins at 20021010 to William Lang | P001232 | ☐ | E-mail |
| P001233 | P001233 | 1 | Tue 08/02/2005 | Hawkins Letter of 8/2/2005 | P001233 | ☑ | Letter |
| P001234 | P001234 | 1 | Mon 09/19/2005 | Hawkins Letter of 9/19/2005 | P001234 | ☑ | Letter |
| P001235 | P001235 | 1 | Fri 11/11/2005 | Lang Letter of 11/11/2005 | P001235 | ☑ | Letter |
| P001401 | P001401 | 1 | Mon 09/19/2005 3:14:05 p.m. ET | Email from Phil Hawkins at 20050923 1514 to William Lang | P001401 | ☐ | E-mail |
| P002014 | P002014 | 1 | Tue 04/19/2005 10:32:23 a.m. ET | Email from William Lang at 20050419 1032 to Phil Hawkins | P002014 | ☐ | E-mail |
| P002016 | P002016 | 1 | Thu 04/21/2005 10:36:16 a.m. ET | Email from William Lang at 20050421 1036 to Phil Hawkins | P002016 | ☐ | E-mail |

The spreadsheet pane displays the first 20,000 records located when a search is run. If a search query locates more than 20,000 records, a message displays indicating which spreadsheets have exceeded this total. This total does not reflect linked file hits, only the spreadsheet record total.

Click on a spreadsheet in the Results pane of the Search Results navigation pane to view only those records and linked files. You can also click the View ribbon and then click Search Results to navigate spreadsheets.

Select check boxes in the Narrow Results pane to view only those search hits found in spreadsheet fields, linked file text, or annotation note text.

Review the following spreadsheet record icons to find where search hits are located and how to access them. Icon columns for search hits only display when check boxes in the Narrow Results pane are selected.

***For each spreadsheet record, the following icons displays (if applicable):***

- **Linked File Paperclip** — Displays a paperclip icon next to any record that has linked files. Click the paperclip icon to view the list of linked files. Double-click on the paperclip to open the file.
- **Tag** — Displays a maroon tag icon next to records that meet the tag criteria.
- **Linked File Text Hit** — Displays a file icon next to records having linked file text hits for the current search. Click on the file icon to open the linked file document.
- **Annotation Note Hit** — Displays an annotation icon next to records having annotation note hits for the current search. Place your mouse pointer over the icon to view a pop-up box with a preview of the note, its starting page number, and the number of hits located in the annotation. Click on the annotation note hit link to view the linked file that contains the annotation and view the note in the Edit Annotation dialog box. The linked file and annotation notes are viewed in DocManager.

**Learn about viewing search hits in DocManager**

CaseMap's DocManager near native file viewer allows you to annotate documents and images linked to case records. DocManager also allows you to review and navigate highlighted search hits located in the linked files.

To learn more about these features, see About DocManager and Viewing documents and images.

Related Topics

Running basic searches
About full-text searches
Running full-text searches
Printing search reports

## Full-Text Search

### *About full-text search*

Full-text searching includes additional advanced search features that allow you to write longer full-text queries. A Full Text Search dialog box features a larger Search Text box than the Search field so you can easily preview and edit the search string before running it. The Link Assistant is also automatically enabled in the Search Text box so you can type search queries faster when you want to use short names.

***With full-text searches you can also do the following:***

- Restrict searches to selected spreadsheets
- View or run previous searches

When writing full-text search queries, you will want to learn how to use search operators that help provide precise search results. For more information, see Using search operators.

> If you want to eliminate short names from your searches, you can disable the Search Link Assistant setting in File > Options > Searching. This setting is enabled by default to ensure you are gathering all relevant data based on search terms in your case records and linked files.

CaseMap's SmartAssist is a full-text search assistant that aids in performing various tasks in CaseMap by allowing you to search for user-driven functions using phrases (e.g., print PDF) to find tasks and/or other pertinent information based on the search parameter.

For more information, see SmartAssist.

Related Topics

About searching
Using search operators
Writing full-text searches
Creating combined searches
Running full-text searches
Running recent searches
Using the Link Assistant
SmartAssist

### *Running full-text searches*

When running a full-text search, you also have the option to restrict what spreadsheets you want to include in the search or re-run a recent search. Search results display in the Search Results pane and the spreadsheet window, just as they do when you run a basic word search.

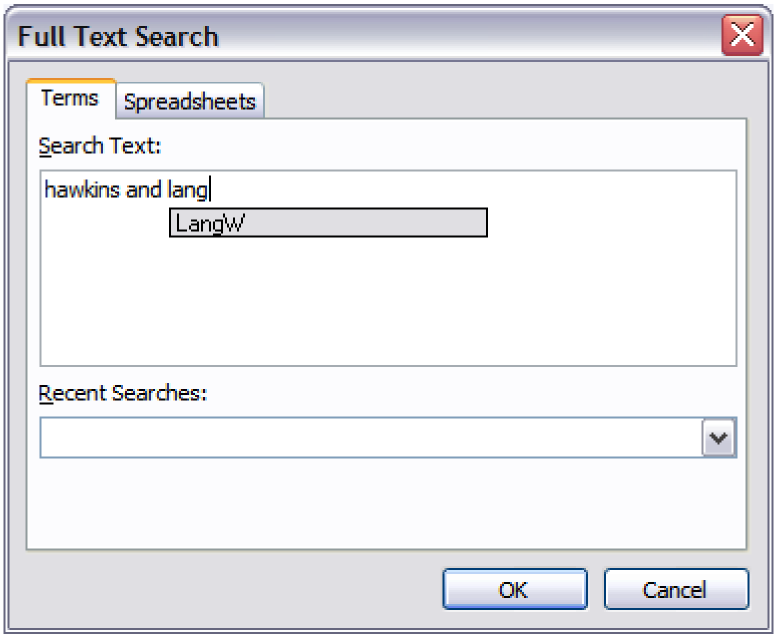
For more information on how to formulate an advanced full-text search, see Using search operators.

#### ⊟ To run a full-text search

1. In the **Search** field, type in your search query and then click the **Full Text Search** button ➔.

If the Search field is empty and you click the Full Text Search button, the Full Text Search dialog box will open.

2. In the **Full Text Search** dialog box, click the **Terms** tab.

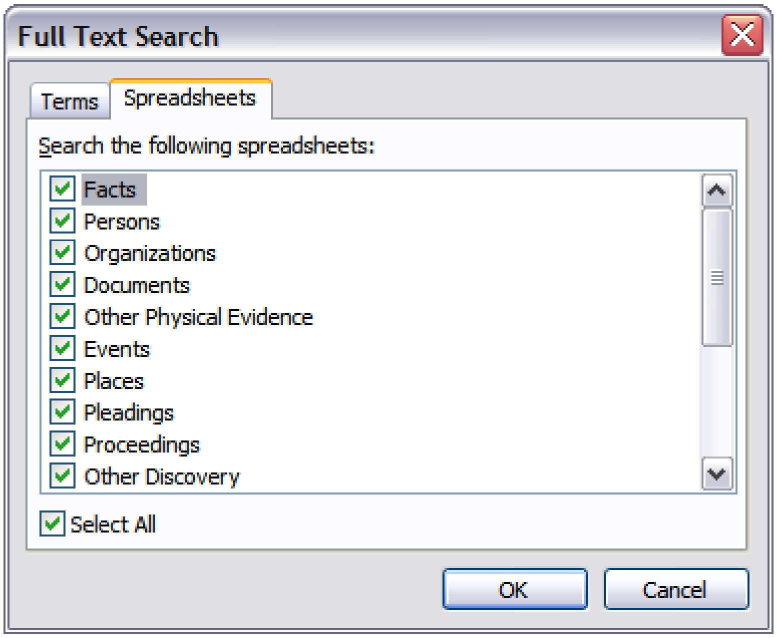

Full Text Search
Terms
Spreadsheets
Search Text:
hawkins and lang
LangW
Recent Searches:
OK
Cancel

3. In the **Search Text** box, type in your search query.

   Notice that the Link Assistant tool is automatically turned on when you are typing.

   Select a short name from the list and press Enter to add the short name to your search query.

4. Click the **Spreadsheets** tab to restrict your search to only include selected spreadsheets.



Search the following spreadsheets:

☑ Facts
☑ Persons
☑ Organizations
☑ Documents
☑ Other Physical Evidence
☑ Events
☑ Places
☑ Pleadings
☑ Proceedings
☑ Other Discovery

☑ Select All

5. Clear the check boxes for any spreadsheets you want to omit from the search.

   Clear the Select All check box to clear all spreadsheets and then select those that you want to include in the search.

6. Click **OK** or press **ENTER** to initiate the search.

   The Search Results pane now lists all spreadsheets that include files with search hits. The number of search hits displays for each spreadsheet.

   The Search Results window displays records for the first spreadsheet listed.

Related Topics

About full-text searches
Using search operators
Running previous searches
Viewing search results
Canceling search results

### *Search operators*

Search operators allow you to write your own advanced queries to garner precise search results from your case records. Once you learn to use search operators, you can advance to typing complex searches that will help you locate facts and details that might otherwise takes hours of review to uncover.

Searching in CaseMap is not case sensitive; you do not have to enter all caps when typing in operators. You should type spaces between search terms and the operator (HawkinsP AND LangW), except when searching with characters or using symbols and punctuation. For more information, refer to the Search Operators table below.

Once you learn how to write your own basic queries, you can advance to creating combined search queries.

## ⊟ Boolean

Boolean operators are based on the binary logic used in computers today, producing strict true or false results. In CaseMap, Boolean operators search at the document and spreadsheet/field level. Boolean operators used in CaseMap include AND, OR, and AND NOT.

## ⊟ Context

Context operators search at the field level. The search term you are trying to locate may still exist elsewhere in your case data (in another field or spreadsheet), you are just narrowing your search to one field.

CaseMap uses the search operator, CONTAINS, to locate text within a specified field. An alternative to typing CONTAINS is typing double colons ::. When you use this option, you must have a space before and after the double colons.

Field names must have quotes around them. For example, when you search the Fact Text field, your query should by typed as: "Fact Text".

If you search a field name that is used in multiple spreadsheets, CaseMap displays results across all spreadsheets if the word is located in that field. For example, Description fields are included in all five spreadsheets.

## ⊟ Proximity

Proximity operators search at the word level and are useful when looking for content that appears in records either in direct succession or adjacent order, or in close succession to each other within a specified range. This number refers to the maximum number of intervening indexed words.

## ⊟ Wildcards

Wildcard operators are symbols you can use as a substitute for characters or series of characters in a search term, creating a broader search with stronger results.

***Using wildcard characters helps you locate:***

- Variations on a root word
- Possible misspellings of a name or word
- Words or names that might include punctuation (apostrophes)

## ⊟ Use the search operators table for reference

| Search Operators Table | | |
|---|---|---|
| **Operator** | **Query** | **Results** |
| **DOCUMENT LEVEL** | | |
| AND contains both words | hawkins AND lang | Finds all files and records with both the words: hawkins and lang |
| OR contains either word | hawkins OR lang | Finds all files and records with either hawkins or lang, or both |
| AND NOT contains first word, but not second | hawkins AND NOT lang | Finds all files and records with hawkins, but not lang |
| "//text" | "//text" CONTAINS hawkins<br>"//text" :: hawkins | Finds text in all linked files with hawkins; excludes text in fields |
| **WORD LEVEL** | | |
| BEFORE | philip BEFORE hawkins<br>philip BEFORE5 hawkins | Finds philip directly preceding hawkins<br>Finds philip before five words of hawkins |
| NEAR | hawkins NEAR5 lang | Finds hawkins within five words of lang |
| LIKE | LIKE deposition | Finds synonyms from the global thesaurus for the search term specified; might locate testimony |
| # performs a phonetic search | #Smith | Finds words that sounds alike, such as Smith and Smythe |
| ~ stemming at the end of a word finds grammatical variations of a word | manage~<br>apply~ | Finds manager<br>Finds applies, applied, applying |
| **FIELD LEVEL** | | |
| CONTAINS | "Fact Text" CONTAINS demoted | Finds demoted in the Fact Text field<br>* Text before the CONTAINS operator must be a field name and the field name must be in quotes.<br>** The CONTAINS operator cannot be used |

| Search Operators Table | | |
|---|---|---|
| **Operator** | **Query** | **Results** |
| | | with the NEAR or BEFORE operators.<br>*** If you search a field name that is used in multiple spreadsheets, CaseMap displays results across all spreadsheets if the word is located in that field. For example, Description fields are included in all five spreadsheets. |
| :: | "Description" :: demoted | Short form alternative for the CONTAINS operator. Returns the same results: Finds demoted in the Fact Text field.<br>The field name must be in quotes. |
| **CHARACTER LEVEL** | | |
| ? represents any character in its place in the character sequence | wom?n | Finds the following: woman, women |
| * matches multiple characters | Phil* | Finds Phil, Philip |
| **NUMERIC** | | |
| < less than | < 50<br>Florida < 32803 | Finds numbers less than 50<br>Finds Florida followed by a number less than 32803 |
| > greater than | > 50 | Finds numbers greater than 50 |
| <= less than or equal to"Bates | <=50 | Finds numbers less than or equal to 50 |
| >= greater than or equal to | >=50 | Finds numbers greater than or equal to 50 |
| = equal to | =50<br>=12 | Finds the number 50<br>Finds dates with the number 12, such as 12/01/2001 and 08/12/2005 |
| <x and >x not equal to | <50 and >50 | Finds all numbers except 50 |
| ~~ finds a numeric range | 10~~20 | Finds any numbers between the two numbers, such as between 10 and 20 |

| Search Operators Table | | |
|---|---|---|
| **Operator** | **Query** | **Results** |
| | | Do not use spaces before and after the operator. |
| TO | 10 TO 20 | Finds numbers in text within the specified range<br>* The TO operator requires numeric text and spaces before and after the operator. |

## Operator order of precedence

Advanced queries can combine multiple operators and search terms. Like mathematics, CaseMap uses a hierarchy to evaluate search queries and return results in a specific order. When you combine search queries, you can use parentheses to enforce operator precedence. Searches within parentheses are evaluated before they are combined with other search operators. Parentheses have the highest precedence.

***CaseMap searches terms in a query in the following operator precedence:***

- LIKE
- Numeric operators
- Implied BEFORE1 (phrase)
- NOT
- CONTAINS
- OR
- BEFORE, NEAR
- AND

***Example of Implied BEFORE1:*** "Fact Text" CONTAINS Philip Hawkins

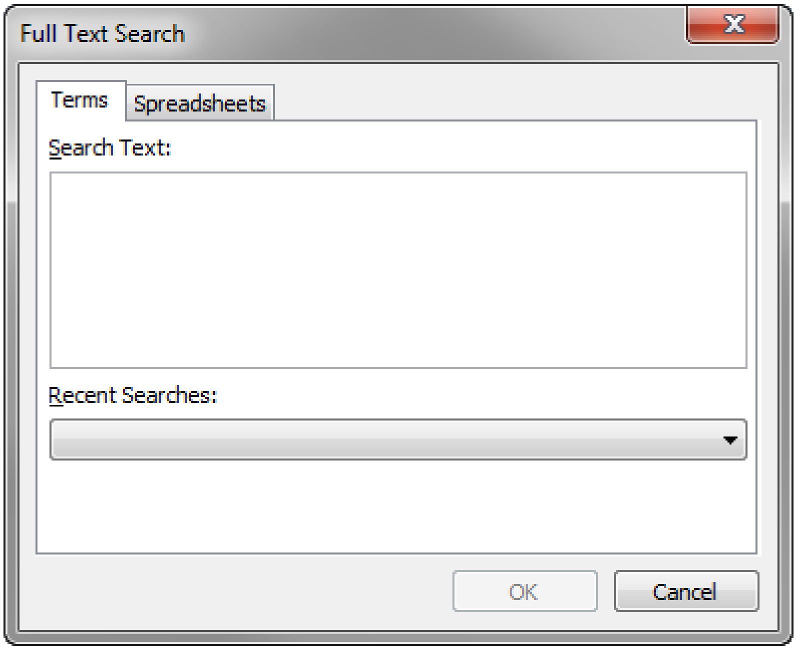
In the above query, the phrase of Philip Hawkins is the Implied BEFORE1 operator. This query is read by CaseMap as: "Fact Text" CONTAINS (Philip Hawkins), so the terms within the parentheses take precedence over the CONTAINS operator.

Related Topics

About full-text searches
Writing full-text searches
Creating combined searches
Running recent searches

### *Writing full-text searches*

You can search for multiple terms (phrases) that occur in a specified sequence by entering the words in the Full Text search text box. You can open the Full Text Search dialog box by clicking the Full Text Search icon in the Case Shortcuts pane.



Any full-text query typed in the Full Text Search dialog box can also be typed in the Search field in the Case Shortcuts or Search Results panes. Because the Full Text Search dialog box is bigger, it allows you to view and edit longer queries easier.

### ⊟ Locating multiple words in any order

The following query finds documents that include the search terms or words, but not in any specified order.

***Example:*** sales OR team OR staff OR managers

### ⊟ Finding a phrase or sequence of words

The following query finds a specific sequence of words.

***Example:*** sales manager

Finds documents or records that include sales and manager in sequential order, such as "And I'm still upset by my demotion to Sales Manager." Does not find results for documents that contain sales or manager as separate words.

## Searching for dates

You can search for dates in both the Date and Date and Time fields. Searching the Date and Date & Time field values also includes the Creation and Last Update Time Stamp fields. NA and TBD date values can be searched and are indexed as "NA" and "TBD".

Only the date in the Date & Time field is indexed; the time is not indexed.

CaseMap indexes date fields in addition to number fields, and indexes a date as a number too. For example, the date 11/12/2011 is indexed as a date and as three separate numbers. If you search for the year 2011, the date 11/12/2011 will display in your search results.

Additionally, a search query of >1 will return all records because of the date and time in the Creation Time Stamp and Last Update Time Stamp fields.

### To search for a dates in a text field

Dates are searched for using the following "date(<date here>)" syntax, but you can choose the date format you want to use. We recommend you type using the date you think is used in the document or file. Double quotes must be included in the query. The date query format can be combined with other search operators like BEFORE, NEAR, and CONTAINS.

***Searching for dates in text fields can be done in a variety of formats:***

- November 11, 2005
- 11 Nov 05
- 2005/11/11 (yyyy/mm/dd)
- 11/11/05 (mm/dd/yy)
- 11-11-05 (mm/dd/yy)

***Examples:*** "date(nov 11 2005)" or "date(September 19, 2005)" or "date(9/19/05)"

### To search for a date range

To search for any date before or after a particular date, type a date range with a minimum and maximum date values. The minimum date value is 1000 and the maximum date value is 2900.

***Example:*** "Date & Time" CONTAINS "date(01/01/2003 TO 01/01/2006)"

## Searching Check Box fields

CaseMap indexes fields that contain check boxes, such as the Key field on the All Objects spreadsheet. A selected check box is indexed as Yes. A cleared check box is indexed as No.

## Searching hyphenated words

CaseMap indexes hyphenated words as having spaces. This ensures that you can locate results regardless of whether a hyphen was used properly in the text.

***Example:*** first-class

This query returns search results for the following: first-class, first, class, firstclass, first and class.

## 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).
- If a currency value is more than $2 billion, it may not be searchable.
- All numbers are indexed as positive.

  ***Example:*** 1234 is indexed as 1234.

- Real numbers and numbers with commas in text fields are indexed as separate numbers.

  ***Example:*** 1234,567.89 is indexed as three separate numbers: 1234 567 89.

- Fractional values will be indexed as zero.

  ***Example:*** $0.75 will be indexed as 0.

- Numeric operators can be used with other operators.

  ***Example:*** HawkinsP near5 12~~17 finds any document containing "HawkinsP" within five words of a number between 12 and 17.

A search query of >1 will return all records because of the date and time in the Creation Time Stamp and Last Update Time Stamp fields.

## Searching emails

Valid Internet email addresses in any CaseMap text field are indexed specifically as email addresses.

***Example:*** john.doe@lawfirm.com

Email addresses can also be searched using the following special query format: "mail(LitigationSalesGroup@ReedElsevier.com)". The double quotes must be included in the query.

The query text inside of the parentheses will also support the use of wildcard characters: "mail(s*@casemap.com)". The special query format can be combined with other search operators like BEFORE, NEAR, and CONTAINS.

## Searching credit card numbers

You can search for credit card numbers using any sequence of numbers that appear to be valid credit card numbers issues by major credit card issuers. Credit card numbers are recognized regardless of the pattern of spaces or punctuation embedded in the numbers.

***Examples of credit card numbers include:***

- 1234-5678-1234-5678
- 1234567812345678
- 1234 5678 1234 5678

Credit card numbers can also be searched using the following special query format: "creditcard(1234-5678-1234-5678)". The double quotes must be included in the query.

The query text inside of the parentheses will also support the use of wildcard characters: "creditcard(*5678)". The special query format can be combined with other search operators like BEFORE, NEAR, and CONTAINS.

Related Topics

[About full-text searches]
[Writing full-text searches]
[Creating combined searches]
[Running recent searches]

### *Creating combined searches*

Advanced queries can combine multiple operators and search terms. Like mathematics, CaseMap uses a hierarchy to evaluate search queries and return results in a specific order. When you combine search queries, you can use parentheses to enforce operator precedence. Searches within parentheses are evaluated before they are combined with other search operators.

#### ⊟ Use parentheses to enforce operator precedence

When formulating search queries with more than one search operator, we recommend you use parentheses. By using parentheses, you can force CaseMap to search the terms you type within the parentheses first, regardless of operator precedence. This allows you flexibility in formulating your own searches and garnering stronger results.

***Example:*** hawkins NEAR12 (manage~ OR lang)

This query returns results where "hawkins" appears within 12 words of "manager", "management", or "lang".

The OR operator carries precedence because the search results do not return instances where "hawkins" may appear within a range of 12 words of "manager", "management", or "lang".

### ⊟ Learn how to formulate combined searches

Combined queries are searches that contain two or more operators and multiple search terms. Using parentheses to offset search terms also helps you read your queries easier.

***Example:*** ("Description" CONTAINS hawkins) OR "Fact Text" CONTAINS lang

This query returns search results when the Description field contains the word "hawkins" or when the Fact Text field contains the word "lang".

***Example:*** "Fact Text" CONTAINS (NOT hawkins)

This query returns search results for all records that do not contain the word "hawkins" in the Fact Text field.

***Example:*** "Fact Text" CONTAINS (philip BEFORE5 hawkins)

This query returns search results for the Fact Text field where the word "Philip" occurs five words before "Hawkins".

***Example:*** "Fact Text" CONTAINS (hawkins OR lang)

This query returns search results when the Fact Text field contains either full name: Hawkins or Lang.

Related Topics

- About full-text searches
- Writing full-text searches
- Creating combined searches
- Running recent searches

### *Recent searches*

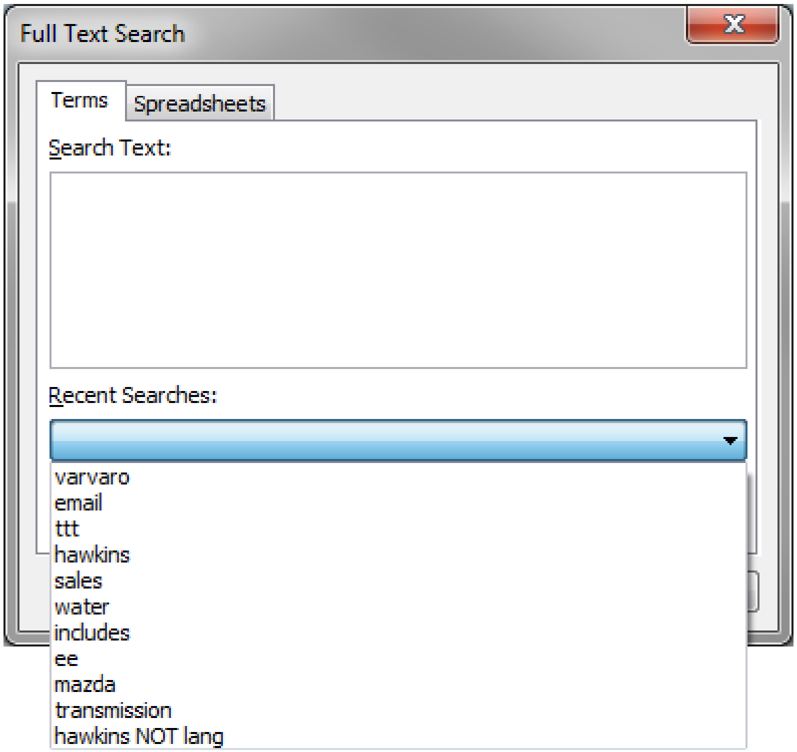
The Recent Searches list displays the last 15 searches you have run in the case. Searches display from top to bottom with the last search displaying at the top of the list. The last search displays in the Search field until you run a new search or close the case.

Recent search history is independent to each case user. Your search history is saved and available to you the next time you log on to the case.

Search history clears as new searches are run. For example, when you run the 16th search, the last search in the list is deleted. The Recent Searches list does not retain duplicate searches. If you re-run a search that is already in the list, the search will not be deleted or duplicated but will filter to the top of the list as the most recent search.

### ⊟ To view or run recent searches

1. In the **Case Shortcuts** pane, click the **Full Text Search** icon.
2. In the **Full Text Search** dialog box, click on the **Recent Searches** list to view the last 15 searches run.


Full Text Search
Terms
Spreadsheets
Search Text:
Recent Searches:
varvaro
email
ttt
hawkins
sales
water
includes
ee
mazda
transmission
hawkins NOT lang

3. Click the search you want to re-run.

   The search query auto-fills in the Search Text box.
4. Click **OK** to initiate the search.

   The Search Results pane opens and updated search results now display.

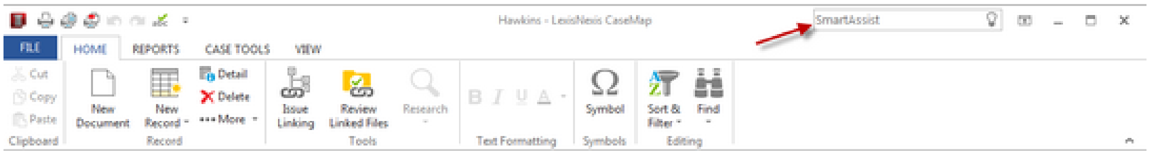
Related Topics

[About full-text searches]()
[Running full-text searches]()

### *SmartAssist search assistant*

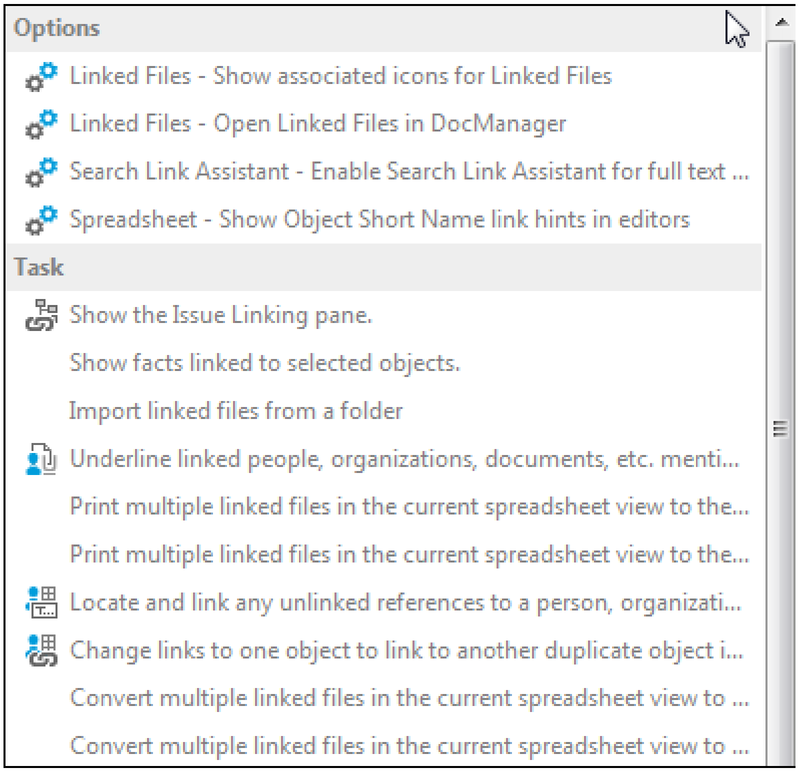
The SmartAssist search assistant aids you in performing various tasks in CaseMap and Lexis Advance. It allows you to search for CaseMap user-driven functions using keyword searches in performing functions such as:

- Navigation -- navigate to a spreadsheet
- Search -- Perform full-text search using search parameters
- Reports -- Launch the report wizard and/or print specific report(s)
- Tasks -- Execute a specific function (e.g., for a record, you may copy/delete it; whereas for a case, you may find/replace it)
- Options -- Open the CaseMap application options dialog and navigate to a specific tab.
- LexisNexis Research -- Access information you need for case discovery and analysis.


Hawkins - LexisNexis CaseMap
SmartAssist
FILE
HOME
REPORTS
CASE TOOLS
VIEW
Cut
Copy
Paste
Clipboard
New Document
New Record
Detail
Delete
More
Record
Issue Linking
Review Linked Files
Research
Tools
Text Formatting
Symbol
Symbols
Sort & Filter
Find
Editing

SmartAssist searches may be performed using:

- a single term — (e.g., linked) to display a list of options and/or tasks that uses the search term 'linked'.  The search results returns a display that are grouped by category type (e.g., Tasks).



Options

Linked Files - Show associated icons for Linked Files

Linked Files - Open Linked Files in DocManager

Search Link Assistant - Enable Search Link Assistant for full text ...

Spreadsheet - Show Object Short Name link hints in editors

Task

Show the Issue Linking pane.

Show facts linked to selected objects.

Import linked files from a folder

Underline linked people, organizations, documents, etc. menti...

Print multiple linked files in the current spreadsheet view to the...

Print multiple linked files in the current spreadsheet view to the...

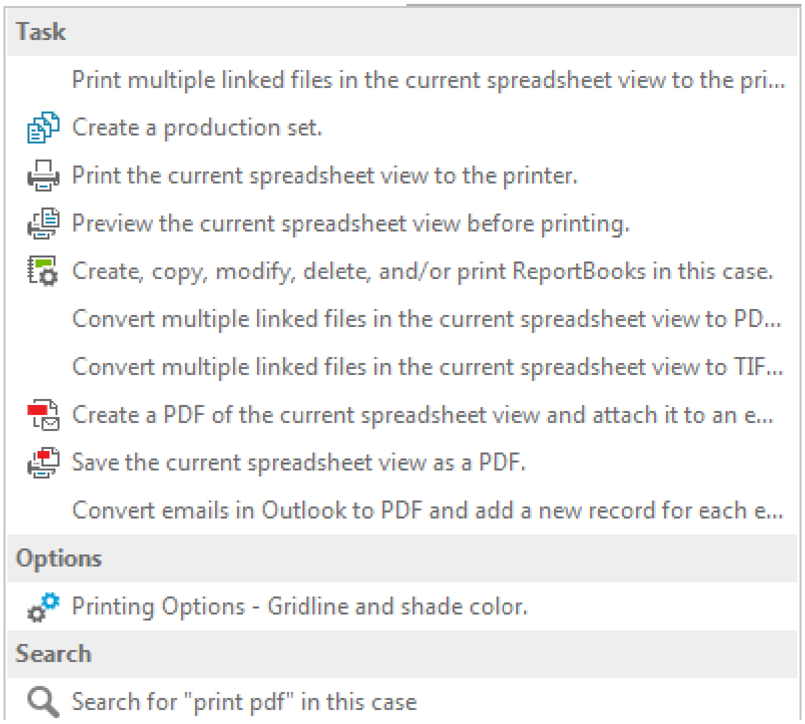
Locate and link any unlinked references to a person, organizati...

Change links to one object to link to another duplicate object i...

Convert multiple linked files in the current spreadsheet view to ...

Convert multiple linked files in the current spreadsheet view to ...

- phrases — (e.g., print PDF) to display a list of options and/or tasks that uses the search phrase 'print PDF'. The search results returns a display that are grouped by category type (e.g., Tasks).



**Task**

Print multiple linked files in the current spreadsheet view to the pri...
Create a production set.
Print the current spreadsheet view to the printer.
Preview the current spreadsheet view before printing.
Create, copy, modify, delete, and/or print ReportBooks in this case.
Convert multiple linked files in the current spreadsheet view to PD...
Convert multiple linked files in the current spreadsheet view to TIF...
Create a PDF of the current spreadsheet view and attach it to an e...
Save the current spreadsheet view as a PDF.
Convert emails in Outlook to PDF and add a new record for each e...

**Options**

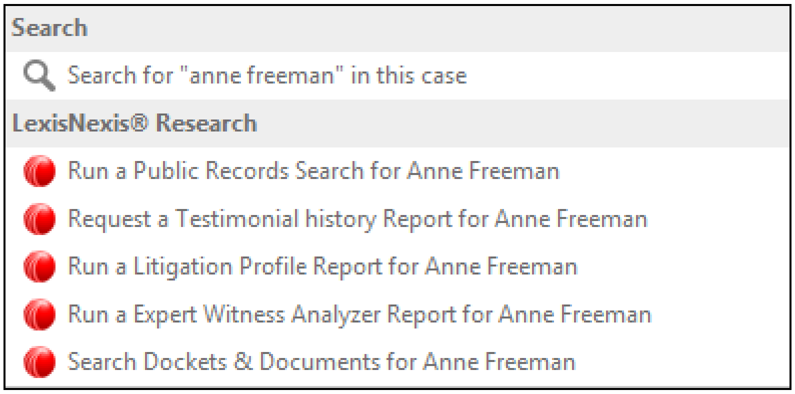
Printing Options - Gridline and shade color.

**Search**

Search for "print pdf" in this case

- Persons, Organizations (e.g., Anne Freeman) to display a list of options and/or tasks that uses the search term related to the object type. The search results returns a display that are grouped by category types for searching within the CaseMap case or to conduct LexisNexis Research.

> The example above is searching for the Expert Witness person type, which provides options to access the information you need for case discovery and analysis.



**Search**

Search for "anne freeman" in this case

**LexisNexis® Research**

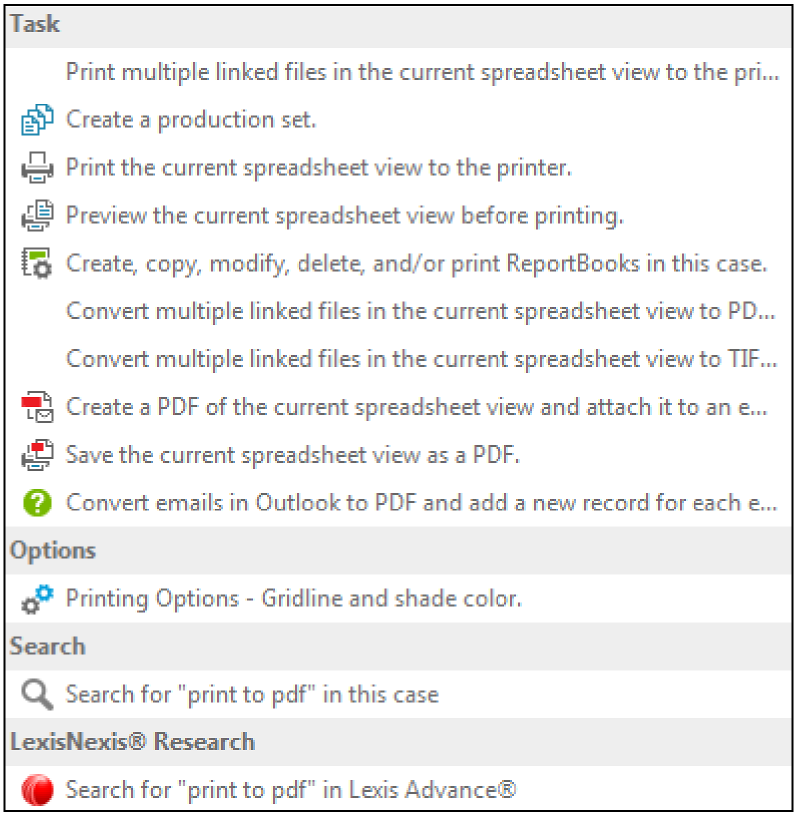
Run a Public Records Search for Anne Freeman
Request a Testimonial history Report for Anne Freeman
Run a Litigation Profile Report for Anne Freeman
Run a Expert Witness Analyzer Report for Anne Freeman
Search Dockets & Documents for Anne Freeman

### To run a SmartAssist search

1. In the **SmartAssist Search** box, type in your search term/search phrase (e.g., print to

pdf).

The SmartAssist Search results box displays.



Task

Print multiple linked files in the current spreadsheet view to the pri...

Create a production set.

Print the current spreadsheet view to the printer.

Preview the current spreadsheet view before printing.

Create, copy, modify, delete, and/or print ReportBooks in this case.

Convert multiple linked files in the current spreadsheet view to PD...

Convert multiple linked files in the current spreadsheet view to TIF...

Create a PDF of the current spreadsheet view and attach it to an e...

Save the current spreadsheet view as a PDF.

Convert emails in Outlook to PDF and add a new record for each e...

Options

Printing Options - Gridline and shade color.

Search

Search for "print to pdf" in this case

LexisNexis® Research

Search for "print to pdf" in Lexis Advance®

You can click the ESC key on your keyboard to clear entries in the SmartAssist Search box.

2. In the **SmartAssist Search Results** box, select/click the desired item in the **Search Results** list to perform its specified function (i.e., Reports, Tasks, Options, LexisNexis Research etc.).

Items in the Search Results list use hyperlinks to execute the specified function. Click on the hyperlink to perform its associated action.

### About SmartAssist LexisNexis Research options

CaseMap has an automated LexisNexis Research option that offers a more unified and simplified approach to researching objects in a case file. This feature allows you to gather information about Persons and Organizations in your case.

The following research options are available for each object type:

- Fact Witness/Litigant/Other Person -- Run a Public Records Search, Run a Litigation Profile Report, Search Dockets & Documents
- Expert Witness -- Run a Public Records Search, Request a Testimonial History Report,

Run a Litigation Profile Report, Run an Expert Witness Analyzer Report, Search Dockets & Documents

- Judge -- Run a Judge Analyzer Report, Run a Judicial Litigation Profile Report, Search Dockets & Documents
- Opposing Counsel -- Find on martindale.com, Run an Attorney Litigation Profile Report, Run an Attorney Analyzer Report, Search Dockets & Documents
- Organization -- Run a Public Records Search, Run a Company Dossier Report, Run a Litigation Profile Report, Search Dockets & Documents

### ⊟ To disable SmartAssist

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click the **SmartAssist** tab.
3. Clear the **Show SmartAssist search box when opening CaseMap** check box.
4. Click **OK** to save your changes.

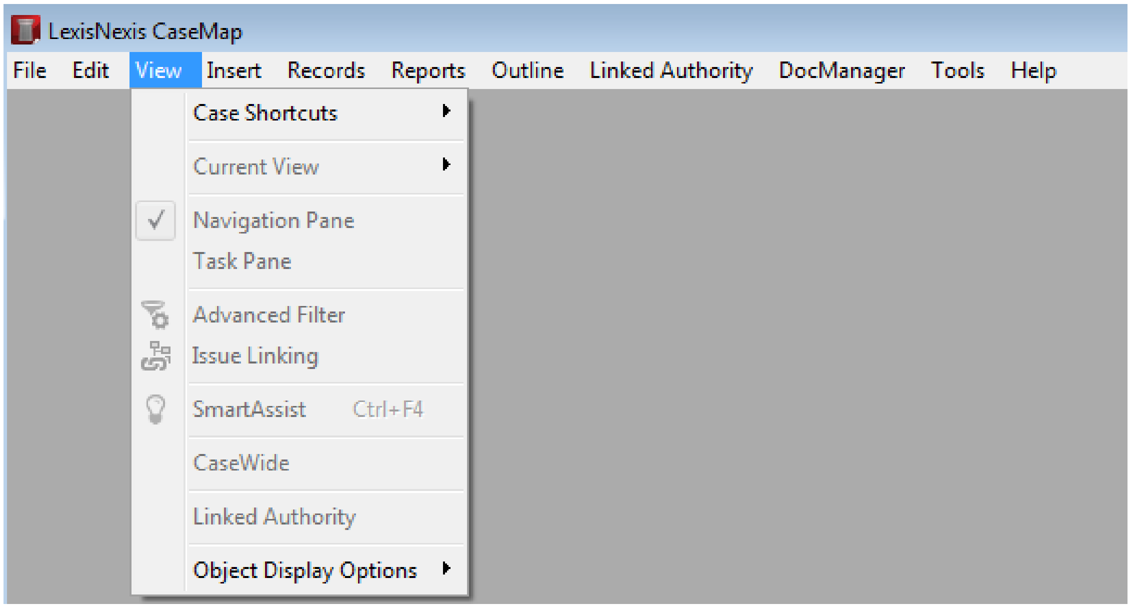
   The SmartAssist element is removed from the CaseMap ribbons.

### ⊟ SmartAssist in accessibility mode

By default CaseMap use ribbons to provide access to the most commonly used tasks and functions. To use SmartAssist while in the Accessibility mode:

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click the **Accessibility** tab.
3. Under **Accessibility Options**, select the **Use standard Windows menu in place of ribbon** check box.
4. In the dialog box, read for understanding, and then click **OK** to continue.
5. In the **Options** dialog box, click **OK** to save your changes.
6. Close and restart the CaseMap application.
7. When CaseMap re-opens, click the **View** tab.

   The SmartAssist element is displayed in the listing.


LexisNexis CaseMap
File
Edit
View
Insert
Records
Reports
Outline
Linked Authority
DocManager
Tools
Help
Case Shortcuts
Current View
Navigation Pane
Task Pane
Advanced Filter
Issue Linking
SmartAssist Ctrl+F4
CaseWide
Linked Authority
Object Display Options

8. Optional: Exiting the accessibility mode

   a. Click the **Tools** tab, and then click **Options** on the menu list.

   b. In the **Options** dialog box, click the **Accessibility** tab.

   c. Under **Accessibility Options**, clear the **Use standard Windows menu in place of ribbon** check box.

   d. In the dialog box, read for understanding, and then click **OK** to continue.

   e. In the **Options** dialog box, click **OK** to save your changes.

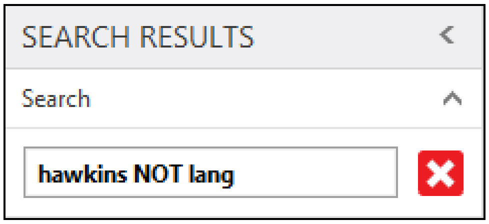
   f. Close and restart the CaseMap application.

Related Topics

About searching
Using search operators
Writing full-text searches
Creating combined searches
Running full-text searches
Running recent searches
Using the Link Assistant

## Canceling searches

After running a search and reviewing the search results, you can easily cancel it and return to the spreadsheet you were previously using. Once the search is canceled, the search query is deleted from the Search field, the Search Results pane closes, and the Case Shortcuts pane displays.



hawkins NOT lang

To cancel a search, click the Cancel Search ✖ button in the Search pane.

If a search is not currently running, the Cancel Search option will be disabled.

Related Topics

[Running basic searches]
[Running full-text searches]
[Viewing search results]

## Viewing search reports

The Search Results pane includes three reports you view and/or print to save your search results and linked file hits:

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

To learn more about each report, click on the links above.

The Linked File Text Hits and Review Linked File Hits reports are a part of the DocManager add-in program. If you have not purchased DocManager, you cannot print these reports. Contact your CaseMap account representative at 866-316-8525 or visit www.lexisnexis.com to learn more information about this product.

Related Topics

- Printing a Search ReportBook
- Printing a Linked File Text Hits Report
- Viewing a Review Linked File Hits report

# Documents

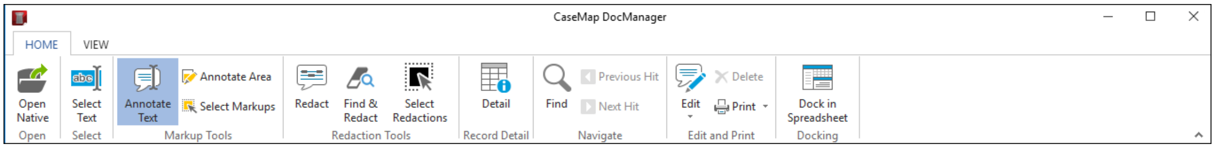
## About DocManager

DocManager is CaseMap's near native file viewer and review tool. Using DocManager, you can review, annotate, redact, and print, documents and images without having to open the source file in its native application.

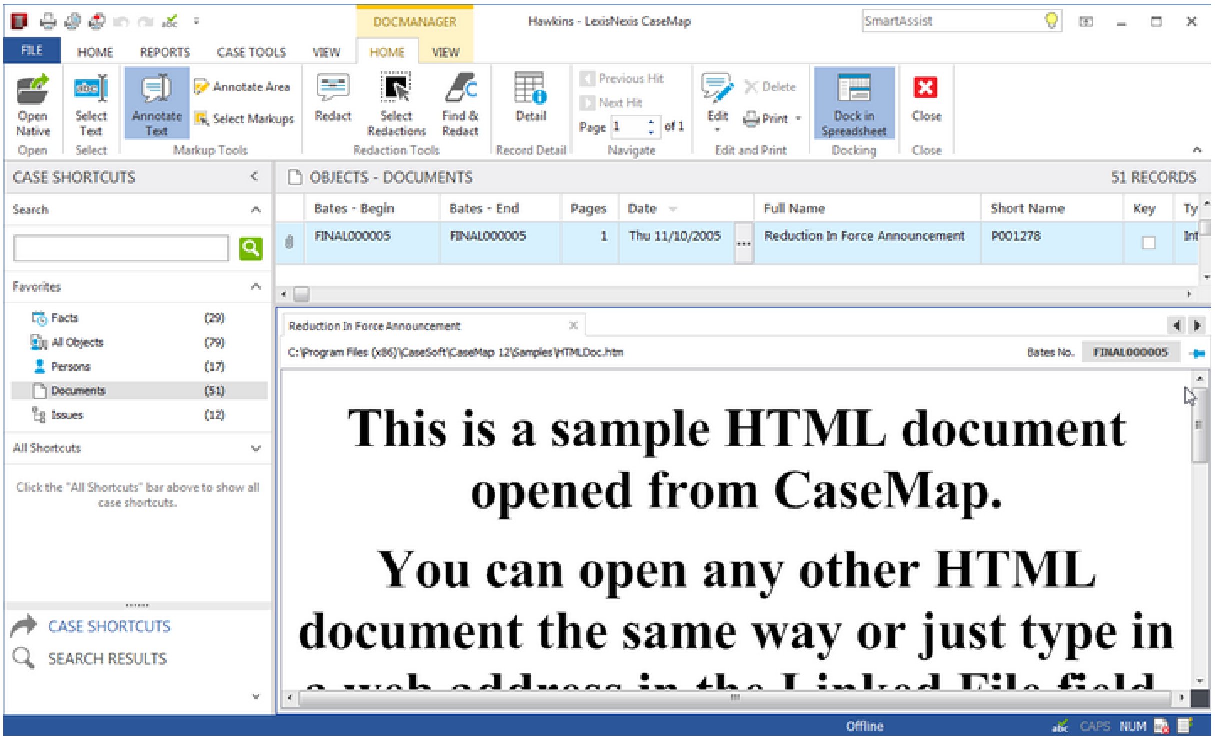
When printing annotated files, you can choose whether to print annotations or not. When you print to PDF, you can choose whether to include annotation notes.

The DocManager redaction tools allows you to hide individual words, sentences, paragraphs, and areas of documents and images.

You can also search and find words/phrases without having to switch between DocManager and CaseMap.. The search results are highlighted and you have the ability to navigate to the search hit location(s) in the document.


CaseMap DocManager
HOME
VIEW
Open Native
Open
Select Text
Select
Annotate Text
Annotate Area
Select Markups
Markup Tools
Redact
Find & Redact
Select Redactions
Redaction Tools
Detail
Record Detail
Find
Previous Hit
Next Hit
Navigate
Edit
Delete
Print
Edit and Print
Dock in Spreadsheet
Docking

Once the 'Dock in Spreadsheet' option to view documents has been selected in the DocManager, all subsequent document viewings will be done via the DocManager being docked within the CaseMap application as depicted in the following illustration. See Docking and undocking the DocManager for more information.


DOCMANAGER
Hawkins - LexisNexis CaseMap
SmartAssist
FILE
HOME
REPORTS
CASE TOOLS
VIEW
HOME
VIEW
Open Native
Select Text
Annotate Text
Annotate Area
Select Markups
Redact
Select Redactions
Find & Redact
Detail
Previous Hit
Next Hit
Page 1 of 1
Edit
Delete
Print
Dock in Spreadsheet
Close
Open
Select
Markup Tools
Redaction Tools
Record Detail
Navigate
Edit and Print
Docking
Close
CASE SHORTCUTS
Search
Favorites
Facts (29)
All Objects (79)
Persons (17)
Documents (51)
Issues (12)
All Shortcuts
Click the "All Shortcuts" bar above to show all case shortcuts.
CASE SHORTCUTS
SEARCH RESULTS
OBJECTS - DOCUMENTS
51 RECORDS
Reduction In Force Announcement
C:\Program Files (x86)\CaseSoft\CaseMap 12\Samples\HTMLDoc.htm
Bates No.
FINAL000005
Offline
CAPS
NUM

| Bates - Begin | Bates - End | Pages | Date | Full Name | Short Name | Key |
|---|---|---|---|---|---|---|
| FINAL000005 | FINAL000005 | 1 | Thu 11/10/2005 | Reduction In Force Announcement | P001278 | ☐ |

This is a sample HTML document opened from CaseMap.

You can open any other HTML document the same way or just type in

***DocManager features include:***

- Viewing documents or images
- Redaction capabilities to include the ability to perform find word/phrases to redact (Find and Redact), printing redaction files with or without redacted content
- Viewing search hits in documents or images
- Display of the Bates stamp label indicating the document numbering scheme
- Viewing document coding data (metadata)
- Annotating documents or images
- Adding searchable annotations
- Creating new facts from an annotation
- Printing annotated files with or without annotations and notes
- Accessing the Linked Document Hits Report and the Review Linked Document Hits report in the Search Results pane
- Search within DocManager without having to switch back to CaseMap

## ⊟ Review complete DocManager descriptions

The following table provides descriptions of DocManager features and where to access them.

Unlike the DocPreviewer plug-in, DocManager does not require Adobe Acrobat or Reader.

| DocManager Overview | | | |
|---|---|---|---|
| **Feature** | **Description** | **DocManager Subscription Required** | **CaseMap Version Required** |
| Navigate search hits | Search hits are highlighted for easy navigation using the Previous Hit and Next Hit buttons in DocManager. The current search hit is highlighted in blue. All other search hits are highlighted in yellow. See Navigating documents. | Yes | CaseMap v10.0+ |
| Annotate documents or images | Annotate selected text in files that are viewable by all case users. Add searchable notes to annotations. Customize annotation color for personal viewing preferences. Edit and delete annotations as needed. View and track annotation history. See Annotating documents, Editing annotations, and Deleting annotations. | Yes | CaseMap v10.0+ |
| Print annotations | Print annotations when you batch print files from DocManager. Burn annotations to images when printing to Printer, PDF, or TIFF. See Printing annotations. | Yes | CaseMap v10.0+ |
| Create new facts from an annotation | Create a new fact or research extract record from an annotation using the Send to CaseMap - New Fact tool. The annotated text and any notes applied to the annotation will display in the Fact Text field on the Facts spreadsheet, or in the Extract Text field in the Extracts from Authorities and Authorities and Extracts research spreadsheets. See Creating new facts/extracts from annotations. | Yes | CaseMap v10.0+ |
| Redact | Select and highlight the confidential text/information [words, sentences, paragraphs/area of text, or an image(s)] to black out/hide in the document. See Creating a new redaction. | Yes | CaseMap v12.0+ |
| Select Redactions | Select an existing redaction for edit. From the Edit and Print ribbon located on the Home ribbon of the | Yes | CaseMap v12.0+ |

## DocManager Overview

| Feature | Description | DocManager Subscription Required | CaseMap Version Required |
|---|---|---|---|
| | DocManager you can copy, access the Redaction Properties and Options sheets, Print, and/or Delete a redaction. See Editing a redaction. | | |
| Linked Documents Text Hits report | Print or view the Linked File Text Hits to reference text excerpts of search hits found in linked files after a full-text search is run. The report displays in DocManager with 12 lines of text before and after each search hit. Search hits print in bold and are highlighted in yellow in the file viewer. Each linked file's full name is highlighted in a gray bar to distinguish the transition of each one in the report. See Printing a Linked File Text Hits Report. | Yes | CaseMap v10.0+ |
| Linked Document Hits report | View the Review Linked Document Hits report to see a list of all linked files containing search hits after a search is run. The report displays in DocManager with an Attachments pane listing the linked files. While previewing the report in DocManager, you can also navigate search hits, open the file in its native application, and access the record detail associated with the file. See Viewing a Review Linked File Hits report. | Yes | CaseMap v10.0+ |
| Search ReportBook | Print a Search ReportBook that contains each spreadsheet record and all linked files located after a search query is run. Linked files are embedded in the PDF report for document sharing outside of CaseMap. See Printing a Search ReportBook. | No | CaseMap v10.0+ |

### ⊟ Try or purchase DocManager

DocManager is available for a free trial period. To activate this trial period, contact CaseMap Technical Support at 800-833-3346 (Option 3) or email casemap.support@lexisnexis.com. You can also activate DocManager from the Help menu by clicking File > Help & Info > Activate CaseMap DocManager.

After the trial period, the batch print features are no longer accessible until you purchase a subscription to DocManager. Documents will open in their native application. Each time you use the trial version, the utility displays the number of days left in your trial period and gives you an option to activate it. To access DocManager, click on a document in the Search Results pane or on the paperclip icon for a document linked to a spreadsheet record.

If you have a DocPreviewer subscription and are also interested in using CaseMap's DocManager near native file viewer, please contact your CaseMap Sales Representative at LitigationSalesGroup@ReedElsevier.com for upgrade pricing.

To inquire about purchasing a DocManager subscription, contact your CaseMap Sales Representative at 866-316-8525 or email LitigationSalesGroup@ReedElsevier.com. To activate DocManager, click File > Help & Info > Activate CaseMap DocManager.

## ⊟ To purchase or learn more about DocManager

To learn more about DocManager, visit www.lexisnexis.com or contact your LexisNexis CaseMap account representative.

To inquire about purchasing a DocManager subscription, contact your LexisNexis CaseMap account representative at 866-316-8525 or email LitigationSalesGroup@ReedElsevier.com.

## ⊟ To install and activate DocManager

DocManager's features are built into CaseMap and are automatically installed.

Activating DocManager requires a subscription or perpetual license that is sold separately in addition to your CaseMap licenses. If you have already purchased DocManager with CaseMap, the add-in is installed with CaseMap. All you need to do further to use it is to activate it.

If you are purchasing DocManager after your CaseMap upgrade or installation, you can activate it from within CaseMap.

- To activate DocManager, click **File** > **Help & Info** > **Activate CaseMap DocManager**.

## ⊟ Supported file types

DocManager can preview the following file formats:

| File Formats | File Extension |
|---|---|
| **General Document and Image Formats** | |
| Adobe Portable Document Format | *.pdf |
| Adobe Pagemaker | *.p65 |
| ASCII text | *.asc |
| Content Sealed Format | *.csf |
| Corel Draw | *.cdr |

| File Formats | File Extension |
|---|---|
| **General Document and Image Formats** | |
| Corel Presentations | *.shw |
| FAX CITT Group 3 Fax | *.fax |
| Hyper Text Markup Language | *.html, *.htm |
| LexisNexis TextMap | *.ptf |
| Microsoft Excel | *.xls, *.xlsx, *.xlt, *.xlw |
| Microsoft Outlook 2007 or 2010 | *.msg |
| Microsoft PowerPoint | *.ppt, *.pps, *.pptx, *.pptm |
| Microsoft Works | *.wdb, *.wps, *.docx, *.xlsx |
| Microsoft Word | *.doc, *.dot, *.docx |
| Quattro Pro | *.wb1, *.wb2, *.wq1 |
| Rich Text Format | *.rtf |
| Samna Word | *.sam |
| Windows Write | *.wri |
| WordPerfect | *.wp5, *.wp6, *.wpd, *.wpf |
| WordStar | *.ws |
| **Imaging Formats** | |
| CALS (Group IV) | *.cal, *.cg4, *. gp4, *.mil |
| DCX (multipage) | *.dcx |
| EDCARS | *.edc |
| Encapsulated Postscript | *.ps, *.eps |
| Formtek Raster | *.ftk |
| GIF | *.gif |
| ISO 8613/CALS | *.iso, *.cal |

| File Formats | File Extension |
|---|---|
| **General Document and Image Formats** | |
| JPEG Compressed Image | *.jpg, *.jpeg |
| PC Paintbrush bitmap | *.pcx |
| Portable Network Graphic | *.png |
| Raytheon G4 / Navy DIF | *.dif |
| Tagged Image File | *.tif, *.tiff |
| Windows Bitmap | *.bmp |
| **CAD Formats** | |
| 000 HPGL Plot File | *.000 |
| 906/907 Plot File | *.906, *.907 |
| AutoCAD Drawing (2D) (through version 2012) | *.dwg |
| AutoCAD DXF (through version 2012) | *.dxf |
| AutoCAD Web Format (through version 2012) | *dwf |
| Auto-trol Raster | *.dx |
| Auto-trol Vector | *.dg |
| CADKEY | *.prt |
| CAD Overlay | *.rlc |
| Computer Graphics Metafile | *.cgm |
| EDMICS | *.edm |
| GTX Group III, IV | *.g3, *.g4, *.cg4 |
| GTX Runlength | *.rnl |
| HP CAD ME10 (through version 13) | *.cmi, *.mi |
| HPGL Plot File | *.plt |

| File Formats | File Extension |
|---|---|
| **General Document and Image Formats** | |
| IGES (2D) (version 5.2) | *.igs, *iges |
| Inventor (2D) (versions 5.3 - 2012) | *.idw |
| MicroStation Drawing (through version 8.1) | *.dgn |
| MicroStation Group IV | *.cit |
| MicroStation Runlength | *.rle |
| MYRIAD 3D View Sets | *.mvs |
| OrCad (version 10) | *.dsn |
| Solid Edge Drawings (2D) (versions 8 - 18) | *.dft |
| SolidWorks Drawings (2D) (versions 97 - 2009) | *.slddrw |
| Wavesoft | *.mot |

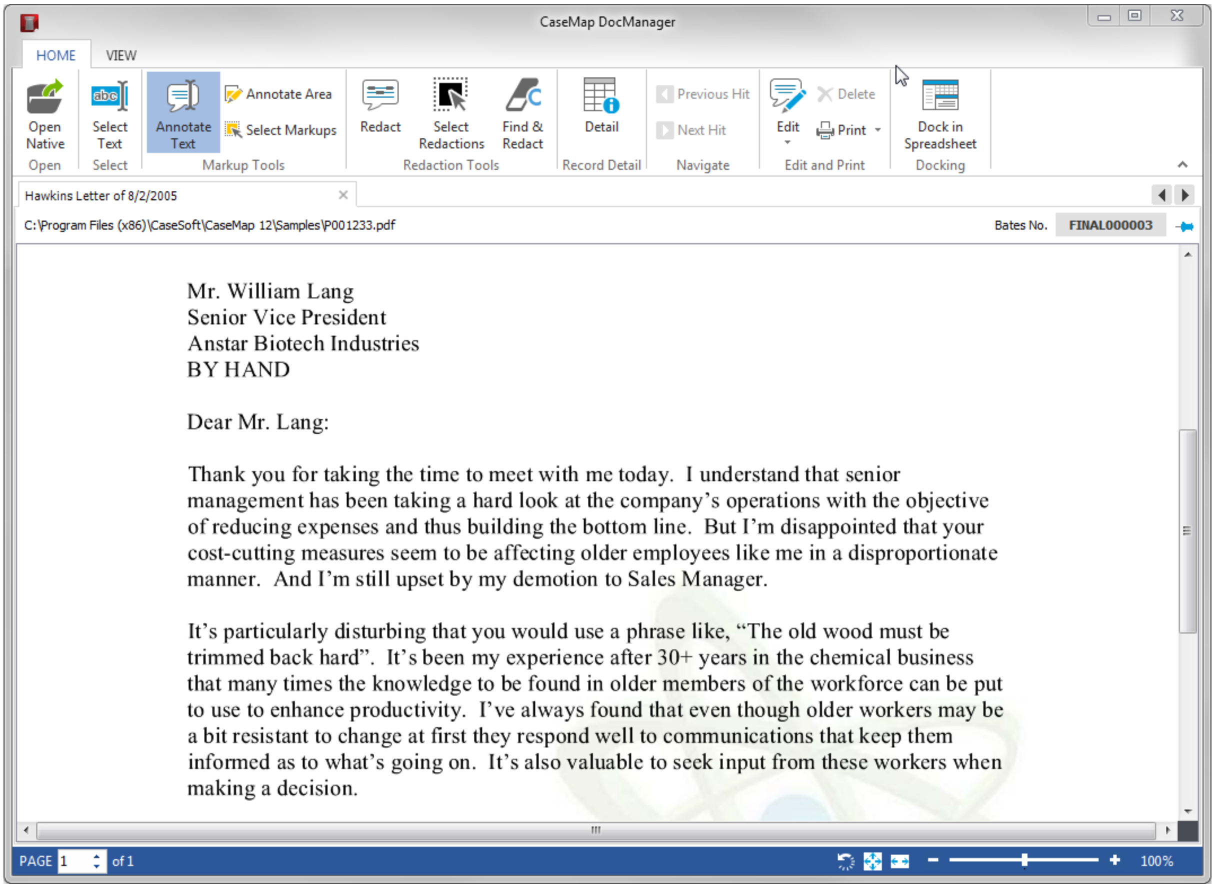
Related Topics

Viewing documents and images
Document review and coding
Creating a new redaction
Viewing a redaction reason
Finding and redacting text
Editing a redaction
Deleting a redaction
Navigating documents
Adjusting document size
Annotating documents
Creating new facts/extracts from annotations
Editing annotations
Deleting annotations

[Printing annotations](#)
[Batch printing linked documents](#)
[Changing DocManager options](#)
[Send emails to CaseMap](#)

## Viewing documents and images

If you are using DocManager, document and images open in the near native window first when selected for viewing. You can still choose to view the document in its native application from within DocManager. When DocManager launches, it opens in a separate window from CaseMap. You can dock this window within CaseMap or move it to a secondary monitor. See [Docking and undocking the DocManager](#) for more information.


CaseMap DocManager
HOME
VIEW
Open Native
Open
Select Text
Select
Annotate Text
Annotate Area
Select Markups
Markup Tools
Redact
Select Redactions
Find & Redact
Redaction Tools
Detail
Record Detail
Previous Hit
Next Hit
Navigate
Edit
Delete
Print
Edit and Print
Dock in Spreadsheet
Docking
PAGE
of 1
100%

Hawkins Letter of 8/2/2005

C:\Program Files (x86)\CaseSoft\CaseMap 12\Samples\P001233.pdf

Bates No. FINAL000003

PAGE 1 of 1

Mr. William Lang
Senior Vice President
Anstar Biotech Industries
BY HAND

Dear Mr. Lang:

Thank you for taking the time to meet with me today. I understand that senior management has been taking a hard look at the company's operations with the objective of reducing expenses and thus building the bottom line. But I'm disappointed that your cost-cutting measures seem to be affecting older employees like me in a disproportionate manner. And I'm still upset by my demotion to Sales Manager.

It's particularly disturbing that you would use a phrase like, "The old wood must be trimmed back hard". It's been my experience after 30+ years in the chemical business that many times the knowledge to be found in older members of the workforce can be put to use to enhance productivity. I've always found that even though older workers may be a bit resistant to change at first they respond well to communications that keep them informed as to what's going on. It's also valuable to seek input from these workers when making a decision.

If you have run a search, search hits will be highlighted in blue in the document with the current hit highlighted in yellow. This allows you to locate and navigate the search hits easily. You can also change the background color of the image, if you find this enhances the viewing quality of particular file types.

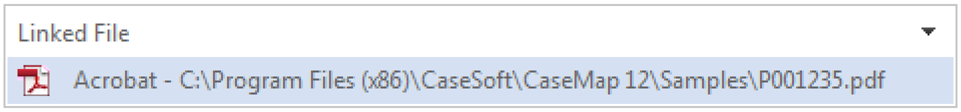
If you want to view multiple documents at one time in DocManager, you can pin them so they remain open when a another document is opened. If a document is unpinned, it will close when you open a new document in DocManager. By default, documents and images display as pinned.

### To view a document or image file

In a spreadsheet, click on the paperclip icon for the linked file you want to view.

> If CaseMap DocManager is not activated, you will be prompted activate it at the time you're attempting to view a document, or to obtain a trial copy. If you do not have a license, contact Support ((800) 543-6862).

The document or file now displays in the DocManager window. Each document or file tab displays the full name for the object, authority, or extract, and its folder location and file type.



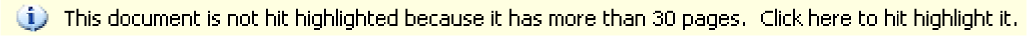
Linked File

Acrobat - C:\Program Files (x86)\CaseSoft\CaseMap 12\Samples\P001235.pdf

If multiple files are opened, multiple tabs will display for each. Click on the file tab you want to view in the forefront.

If there is no associated image for this file, DocManager displays a message stating that the image file is not found.

If a file contains 30+ pages, the search hit highlighting feature will be turned off (by default). This allows larger documents to display faster in DocManager. When viewing a large document that contains search hits, a message displays at the top of the file tab that allows you to turn on hit highlighting. To modify this setting, see Changing DocManager options.



This document is not hit highlighted because it has more than 30 pages. Click here to hit highlight it.

### To pin a document or image

Documents opened in DocManager display as unpinned by default so that only one document displays in the viewer at one time, preserving processing memory on your computer. When a new document is opened, the current document will close before the new one displays. To change the default pin setting, see Changing DocManager options.

You can display more than one document in the viewer too by clicking the Pin tab. Pinning documents keeps them open in DocManager so that multiple documents can be displayed for review. Each document displays in its own tab. Click on the document tab you want to view to bring it to the forefront of others in the DocManager window. See the screen example at the beginning of this topic for pinned document display.

1. In **DocManager**, click on the tab for the document or image you want to view.

2. Click the **Pin** button in the upper right corner of the document.

**unpinned** **pinned**

### To open the file in its native application

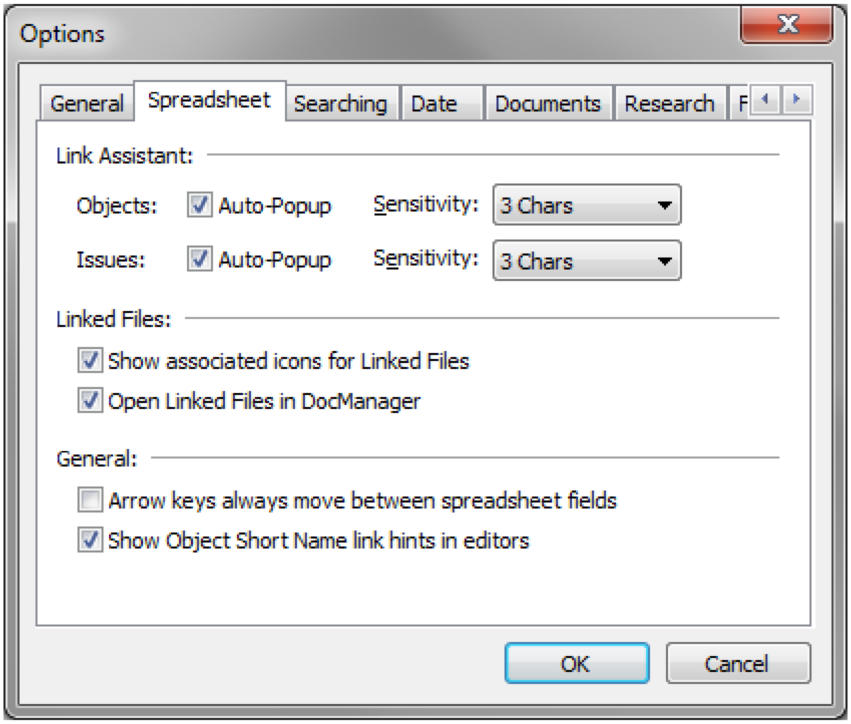
1. Open a document or image in DocManager.
2. Click the **Open Native** button .

   The source file now displays in its native application.

### To create a toggle toolbar button for viewing files

If you intend to view files in their native applications frequently, you can add a toggle toolbar button to the CaseMap toolbar. This allows you to quickly toggle between viewing files in the native application or viewing them automatically in the DocManager viewer.

1. In **CaseMap**, click the **File** tab and then click **Options**.
2. Click the **Spreadsheet** tab.
3. On the **Spreadsheet** tab, clear the **Open Linked Files in DocManager** check box, and then click **OK**.



Link Assistant:

Objects: ☑ Auto-Popup Sensitivity: 3 Chars

Issues: ☑ Auto-Popup Sensitivity: 3 Chars

Linked Files:

☑ Show associated icons for Linked Files

☑ Open Linked Files in DocManager

General:

☐ Arrow keys always move between spreadsheet fields

☑ Show Object Short Name link hints in editors

Linked files will now open in their native application instead of the DocManager viewer.

### To close documents and files in DocManager

On the DocManager Home ribbon, click the ✖ button.

If you have multiple documents or files displaying, they will remain open in DocManager until you close each tab or you close DocManager.

## To close the DocManager viewer

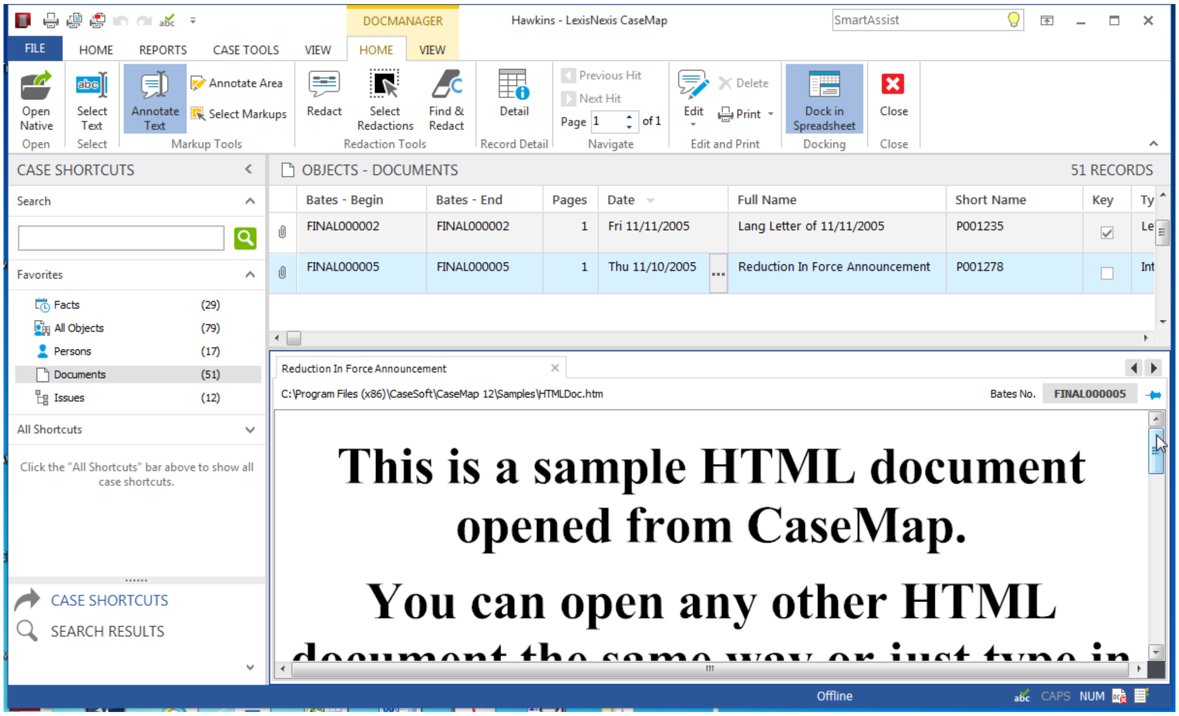
If DocManager displays in a separate window (undocked), you can click the ✕ in the upper right-hand corner to close it.

If DocManager is docked as a pane in CaseMap, you can click the ✕ in the upper right corner to close the window.

## To dock the DocManager viewer in CaseMap

You can dock or undock DocManager in CaseMap depending on your monitor size, monitor setup, and viewing preference. We recommend you adjust the settings to best accommodate your setup and working style. By default DocManager displays in a separate window. If you have a dual monitor setup, the DocManager window automatically opens to display on the secondary screen.

You can also resize the DocManager window to a size that works best for your viewing needs. CaseMap will remember your DocManager window size the next time you open a document.


DOCMANAGER
Hawkins - LexisNexis CaseMap
SmartAssist
FILE
HOME
REPORTS
CASE TOOLS
VIEW
HOME
VIEW
Open Native
Select Text
Annotate Text
Annotate Area
Select Markups
Redact
Select Redactions
Find & Redact
Detail
Previous Hit
Next Hit
Page 1 of 1
Edit
Delete
Print
Dock in Spreadsheet
Close
Open
Select
Markup Tools
Redaction Tools
Record Detail
Navigate
Edit and Print
Docking
Close
CASE SHORTCUTS
Search
Favorites
Facts (29)
All Objects (79)
Persons (17)
Documents (51)
Issues (12)
All Shortcuts
Click the "All Shortcuts" bar above to show all case shortcuts.
CASE SHORTCUTS
SEARCH RESULTS
OBJECTS - DOCUMENTS
51 RECORDS
Reduction In Force Announcement
Bates No.
FINAL000005
Offline
CAPS
NUM

| Bates - Begin | Bates - End | Pages | Date | Full Name | Short Name | Key | Ty |
|---|---|---|---|---|---|---|---|
| FINAL000002 | FINAL000002 | 1 | Fri 11/11/2005 | Lang Letter of 11/11/2005 | P001235 | ☑ | Le |
| FINAL000005 | FINAL000005 | 1 | Thu 11/10/2005 | Reduction In Force Announcement | P001278 | ☐ | Int |

C:\Program Files (x86)\CaseSoft\CaseMap 12\Samples\HTMLDoc.htm

This is a sample HTML document opened from CaseMap.

You can open any other HTML

If you dock DocManager within CaseMap, you can also adjust the size of the spreadsheet and DocManager panes by dragging the split bar up or down. CaseMap will remember your DocManager view preference for the next time you open a document.

If DocManager is docked as a pane in CaseMap, you will not have access to DocManager menus. Undock the viewer to regain access to DocManager menus.

1. Open a document in **DocManager**.
2. On the **Home** tab, click the **Dock in Spreadsheet** button.

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

> 📝 Once the 'Dock in Spreadsheet' option to view documents is selected, all subsequent document viewings will be done via the DocManager being docked within the CaseMap application. See Docking and undocking the DocManager for more information.

3. To undock DocManager, click the **Dock in Spreadsheet** button again.
4. Drag the split bar between the spreadsheet window and DocManager to adjust each to your viewing preference.

### ⊟ To change the background color

For viewing purposes, you can change the background color of the document or image for how it displays in Near Native view. Once a background color is selected, that color will become the default color when like file types are being viewed. For example, if you set the background type in a Word document to gray, then next Microsoft Office document file being viewed will also display will a gray background.

Right-click on the document or image and click **Background Colors**, and then click: **Black**, **White**, **Gray**, or **Default**.

The Default color is determined by the file type. For example, documents in Microsoft Office formats will be white, but CAD file backgrounds will be black.

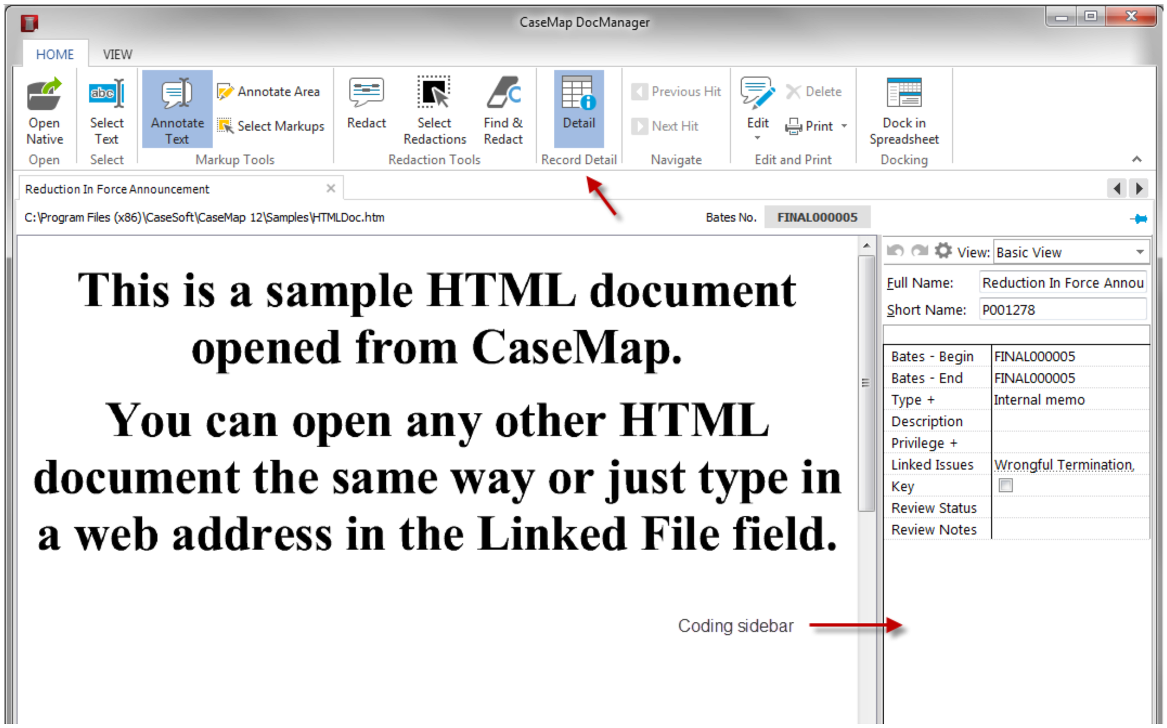
Related Topics

- About DocManager
- Document review and coding
- Document production
- Navigating documents
- Adjusting document size
- Docking and undocking the DocManager

## Document review and coding

The CaseMap DocManager provides users with the ability to view linked files, documents, and images without having to open the source file in its native application. The DocManager also allows you to view document details and coding data (metadata) simultaneously while in the viewer. When you click the Detail button on the Home ribbon of the DocManager, the Document Coding Sidebar displays, allowing you to easily see the document and provides you with the ability to change coding parameters for documents.

Multiple clicks of the Detail button allows you to toggle between the display/non-display of the Document Coding Sidebar.


CaseMap DocManager
HOME
VIEW
Open Native
Open
Select Text
Select
Annotate Text
Annotate Area
Select Markups
Markup Tools
Redact
Select Redactions
Find & Redact
Redaction Tools
Detail
Record Detail
Previous Hit
Next Hit
Navigate
Edit
Delete
Print
Edit and Print
Dock in Spreadsheet
Docking
Reduction In Force Announcement
C:\Program Files (x86)\CaseSoft\CaseMap 12\Samples\HTMLDoc.htm
Bates No.
FINAL000005
View:
Basic View
Coding sidebar

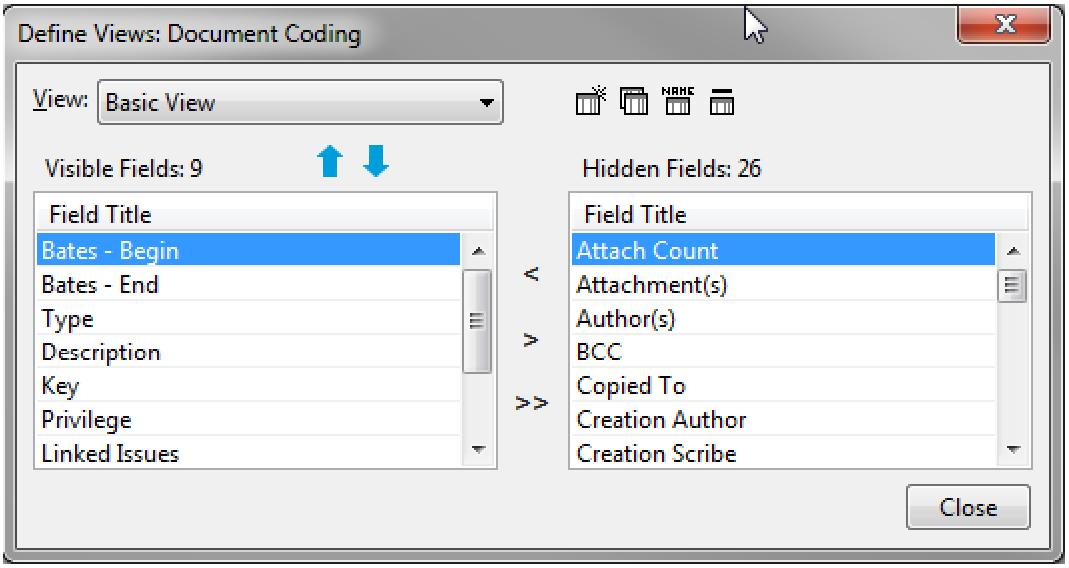
**This is a sample HTML document opened from CaseMap.**

**You can open any other HTML document the same way or just type in a web address in the Linked File field.**

Full Name: Reduction In Force Annou
Short Name: P001278

| | |
|---|---|
| Bates - Begin | FINAL000005 |
| Bates - End | FINAL000005 |
| Type + | Internal memo |
| Description | |
| Privilege + | |
| Linked Issues | Wrongful Termination, |
| Key | ☐ |
| Review Status | |
| Review Notes | |

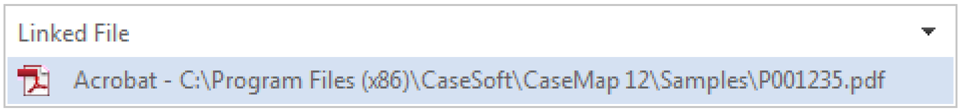
When you click the cogwheel icon in the View area of the Document Coding Sidebar, the Define Views dialog box displays which provides you with the ability to modify existing coding views, edit document metadata and the ability to add/remove fields to and from the list.


Define Views: Document Coding
View:
Basic View
Visible Fields: 9
Hidden Fields: 26
Field Title
Bates - Begin
Bates - End
Type
Description
Key
Privilege
Linked Issues
<
>
>>
Field Title
Attach Count
Attachment(s)
Author(s)
BCC
Copied To
Creation Author
Creation Scribe
Close

## Viewing document metadata

1. In the **Documents** spreadsheet, click on the paperclip icon for the linked file you want to view.

2. Click on the linked file to open it.



Linked File

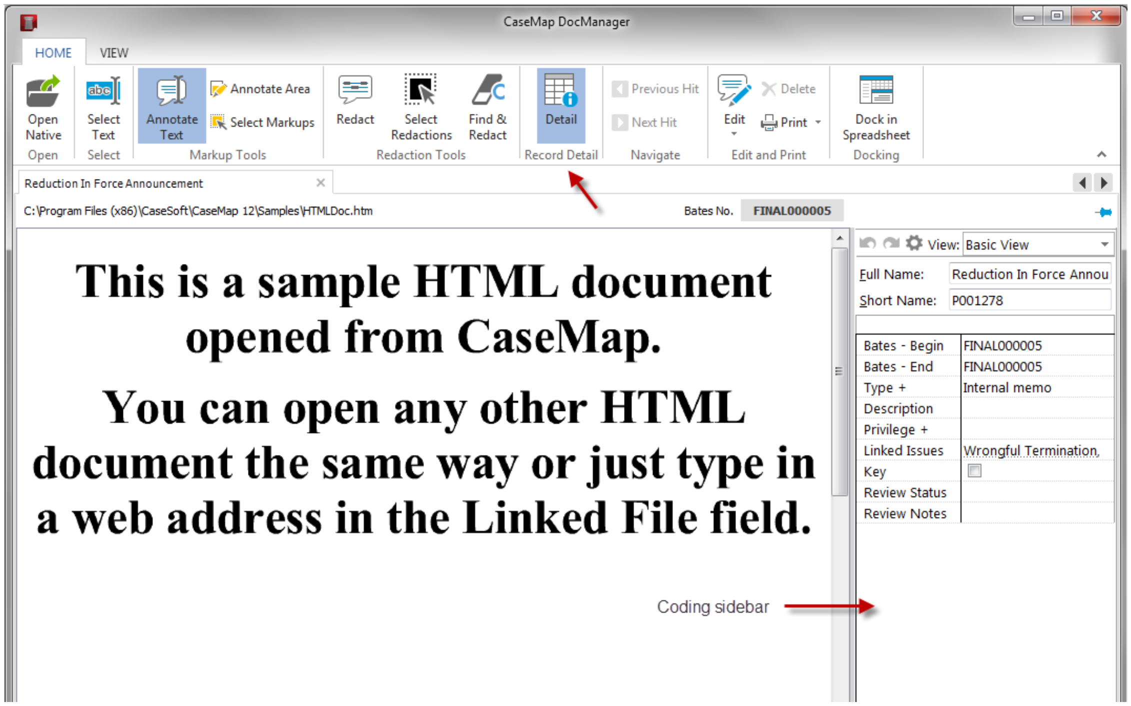
Acrobat - C:\Program Files (x86)\CaseSoft\CaseMap 12\Samples\P001235.pdf

The document or file now displays in the DocManager window.

If CaseMap DocManager is not activated, you will be prompted activate it at the time you're attempting to view a document, or to obtain a trial copy. If you do not have a license, contact Support ((800) 543-6862).

3. On the **Home** ribbon of the DocManager, click the button.

The Document Coding Sidebar displays on the right side of the review screen, and the Detail button is highlighted.


CaseMap DocManager
HOME
VIEW
Open Native
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Select Text
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Clicking the button allows you to toggle between the display/non-display of the Document Coding Sidebar.

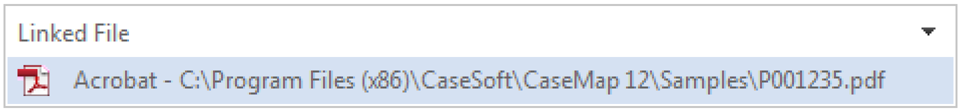
4. Click the in the upper right corner to close the window.

During a document review, the metadata for any object can be edited and/or changed.

## Changing document metadata

1. In the **Documents** spreadsheet, click on the paperclip icon for the linked file you want to view.

2. Click on the linked file to open it.



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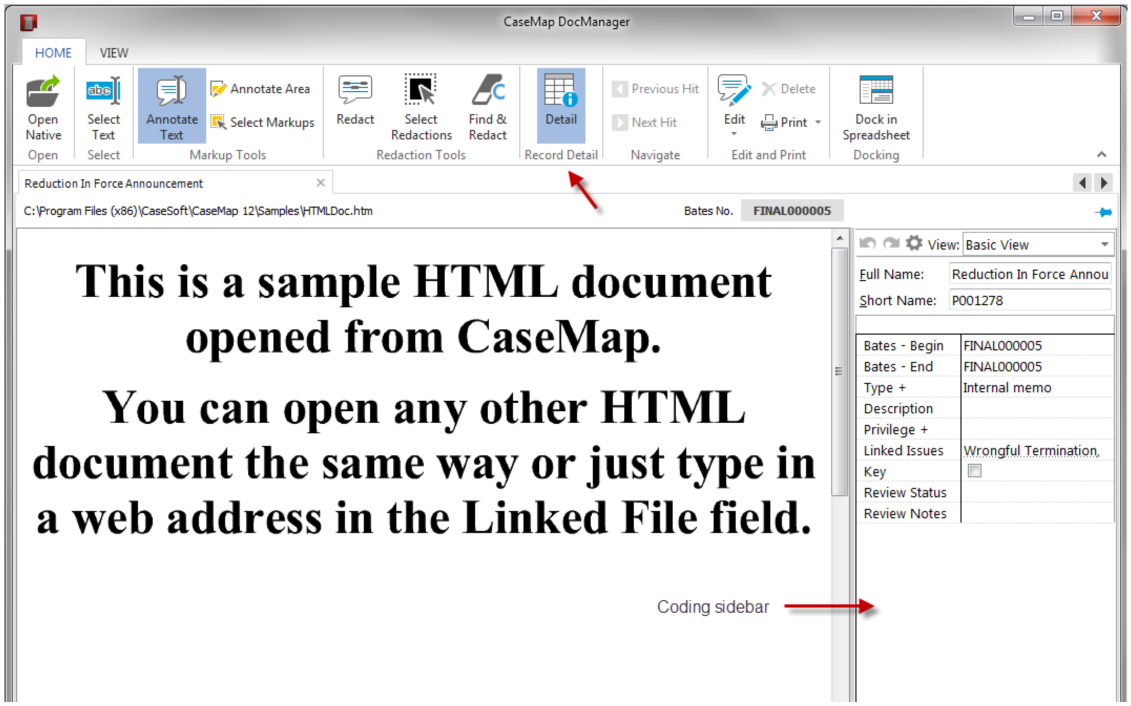
3. On the **Home** ribbon of the DocManager, click the button.

The Document Coding Sidebar displays on the right side of the review screen, and the Detail button is highlighted.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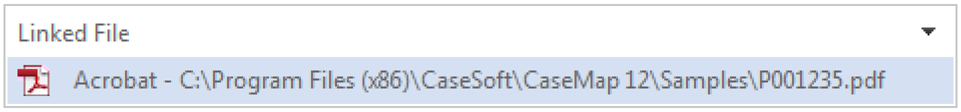
Clicking the button allows you to toggle between the display/non-display of the Document Coding Sidebar.

4. In the **Document Coding Sidebar**, click in the field(s) to be edited/changed and make updates as needed.
5. Navigate to the previous/next document to save the changes/updates.

When you click the cogwheel icon in the View area of the Document Coding Sidebar, the Define Views dialog box opens, displaying one of two standard/default views (All Fields or the Default View).

### Setting document standard views

1. In the **Documents** spreadsheet, click on the paperclip icon for the linked file you want to view.
2. Click on the linked file to open it.



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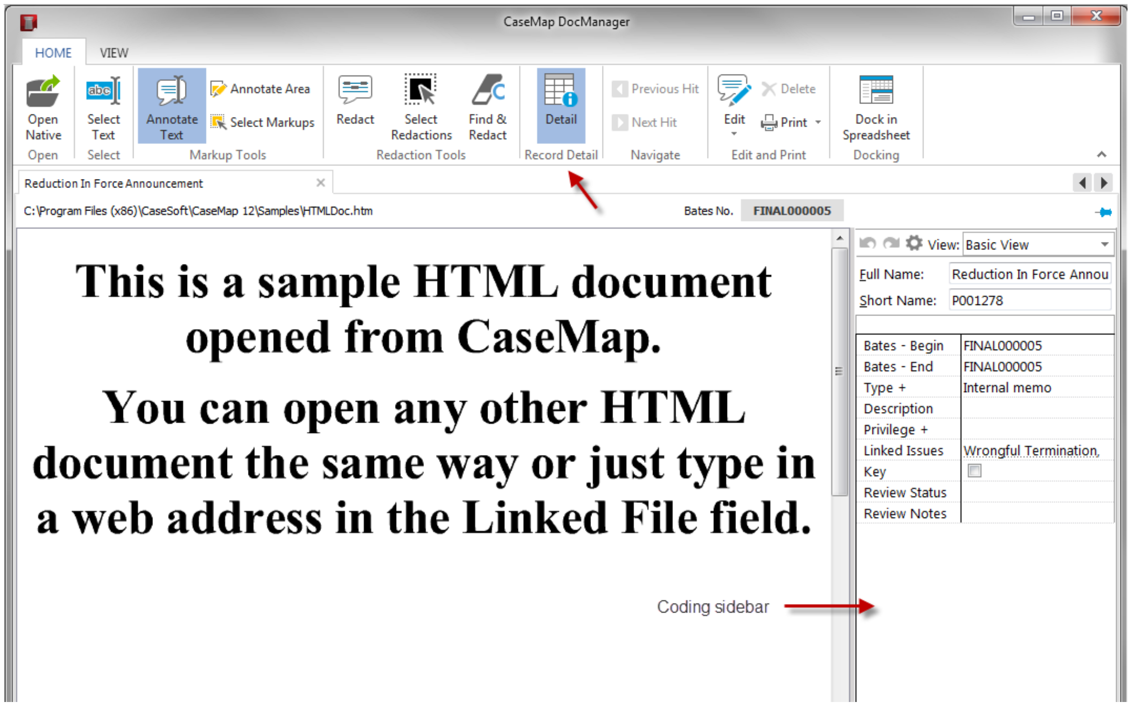
3. On the **Home** ribbon of the DocManager, click the button.

   The Document Coding Sidebar displays on the right side of the review screen, and the Detail button is highlighted.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View:
Coding sidebar

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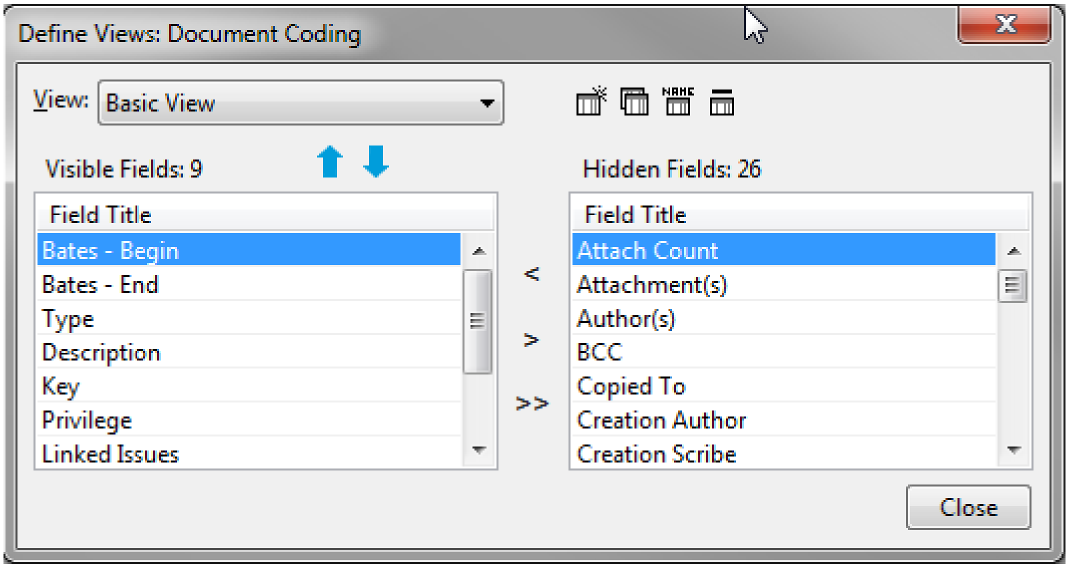
Multiple clicks of the Detail button allows you to toggle between the display/non-display of the Document Coding Sidebar.

4. In the **Document Coding Sidebar**, click the cogwheel icon ⚙ to display the **Define Views** dialog box.


Define Views: Document Coding
<
>
>>
Close

View: Basic View

Visible Fields: 9

| Field Title |
|---|
| Bates - Begin |
| Bates - End |
| Type |
| Description |
| Key |
| Privilege |
| Linked Issues |

Hidden Fields: 26

| Field Title |
|---|
| Attach Count |
| Attachment(s) |
| Author(s) |
| BCC |
| Copied To |
| Creation Author |
| Creation Scribe |

5. Optional: In the **View** area, select one of the following:

**Extended View**, where all applicable fields are listed

**Basic View**, where only selected fields are listed

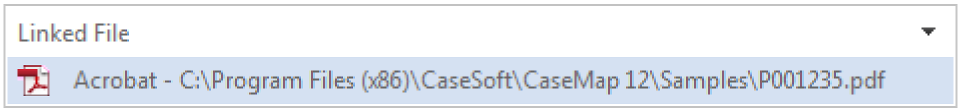
A **Customized View**

6. Click **Close** to exit.

You can customize and adjust the coding fields displayed in the Document Coding Sidebar.

### Customizing view options

1. In the **Documents** spreadsheet, click on the paperclip icon for the linked file you want to view.
2. Click on the linked file to open it.



Linked File

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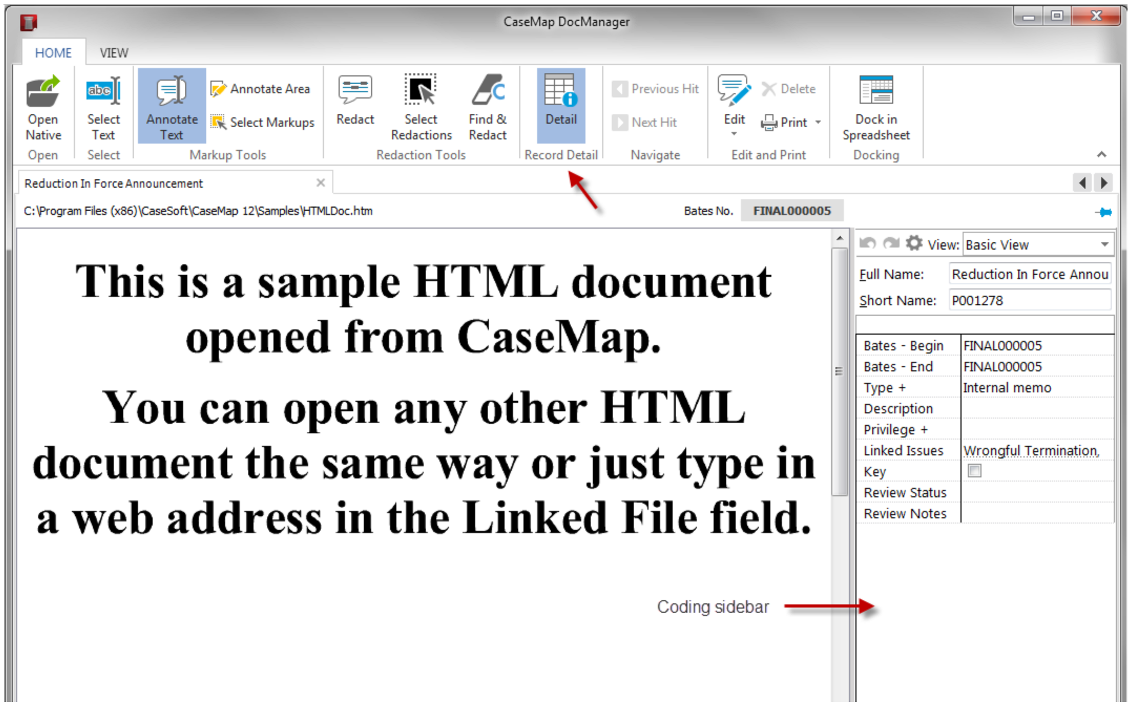
3. On the **Home** ribbon of the DocManager, click the Detail button.

The Document Coding Sidebar displays on the right side of the review screen, and the Detail button is highlighted.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Reduction In Force Announcement
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C:\Program Files (x86)\CaseSoft\CaseMap 12\Samples\HTMLDoc.htm

Bates No. FINAL000005

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View: Basic View

Full Name: Reduction In Force Annou

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| Linked Issues | Wrongful Termination, |
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| Review Status | |
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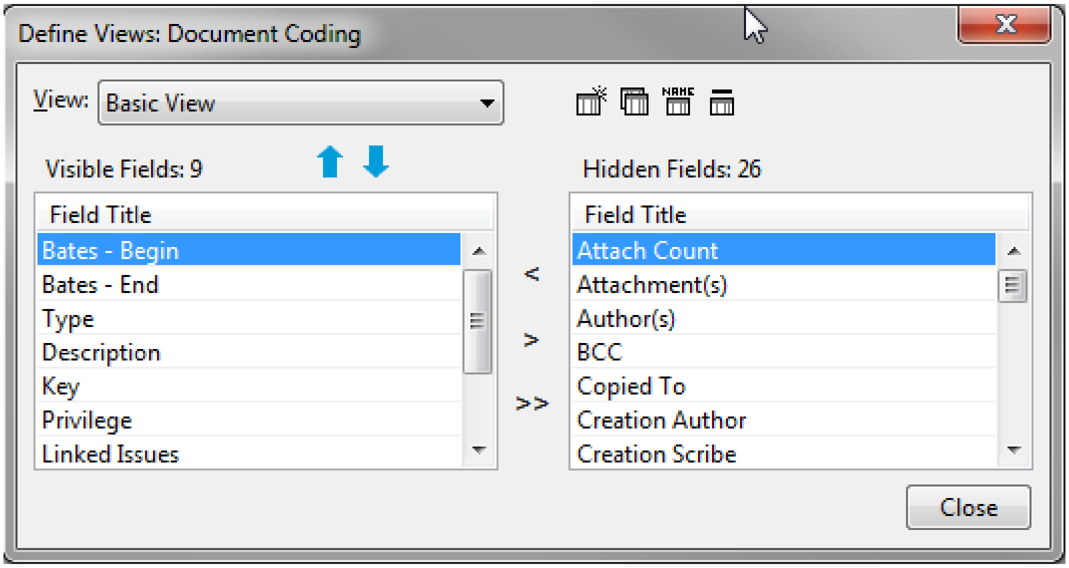
Multiple clicks of the Detail button allows you to toggle between the display/non-display of the Document Coding Sidebar.

4. In the **Document Coding Sidebar**, click the cogwheel icon to display the **Define Views** dialog box.


Define Views: Document Coding
<
>
>>
Close

View: Basic View

Visible Fields: 9

| Field Title |
|---|
| Bates - Begin |
| Bates - End |
| Type |
| Description |
| Key |
| Privilege |
| Linked Issues |

Hidden Fields: 26

| Field Title |
|---|
| Attach Count |
| Attachment(s) |
| Author(s) |
| BCC |
| Copied To |
| Creation Author |
| Creation Scribe |

5. Optional: Above the **Hidden Fields** area of the **Define Views** dialog box, click one of the following icons:

### New View

a. Click the **New View** icon .

b. In the **Name** field of the **New View** dialog box, enter the name of the view and click **OK**.

The Define View dialog box refreshes and displays the new view.

> All Fields are hidden.

c. In the **Hidden Fields** area of the **Define Views** dialog box, select/double-click on a field to move it to the **Visible Fields** portion of the dialog box.

d. Optional: In the **Visible Fields** column, click on the last field moved, and then click the applicable **Up** or **Down** arrow to place the field in a desired location/order

e. Optional: In the **Visible Fields** area of the **Define Views** dialog box, select/double-click on a field to move it to the **Hidden Fields** portion of the dialog box.

f. Repeat **Step c** and **Step d** until all applicable fields have been selected and are now in the desired column(s) of the dialog box.

g. Click **Close**.

### Copy View

a. Click the **Copy View** icon .

b. In the **Name** field of the **Copy View** dialog box, enter the name of the view, or accept the name as indicated '**Copy of...**' and click **OK**.

The Define View dialog box refreshes and displays the new view.

c. Optional: In the **Hidden Fields** area of the **Define Views** dialog box, select/double-click on a field to move it to the **Visible Fields** portion of the dialog box, if applicable.

d. Optional: In the **Visible Fields** area of the **Define Views** dialog box, select/double-click on a field to move it to the **Hidden Fields** portion of the dialog box, if applicable.

e. Repeat **Step c** and **Step d** until all applicable fields have been selected and are now in the desired column(s) of the dialog box.

f. Click **Close**.

### Rename View

a. Click the **Rename View** icon .

b. In the **Name** field of the **Rename View** dialog box, enter the new name of the view, and click **OK**.

The Define View dialog box refreshes and displays the updated view.

c. Optional: In the **Hidden Fields** area of the **Define Views** dialog box, select/double-click on a field to move it to the **Visible Fields** portion of the dialog box, if applicable.

d. Optional: In the **Visible Fields** area of the **Define Views** dialog box, select/double-click on a field to move it to the **Hidden Fields** portion of the dialog box, if applicable.

e. Repeat **Step c** and **Step d** until all applicable fields have been selected and are now in the desired column(s) of the dialog box.

f. Click **Close**.

### ⊟ Delete View

a. Click the **Delete View** icon .

b. In the **confirmation** dialog box, click **Yes** to confirm that you want to delete the view.

The view has been deleted and a new Define View dialog box displays.

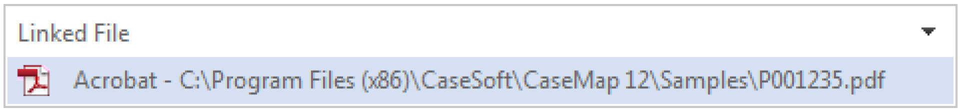
c. Click **Close**.

You can also modify a selected view by hiding, displaying, and/or moving fields up or down within the Document Coding Sidebar to change the display order.

### ⊟ Modifying the selected view

1. In the **Documents** spreadsheet, click on the paperclip icon for the linked file you want to view.

2. Click on the linked file to open it.



Acrobat - C:\Program Files (x86)\CaseSoft\CaseMap 12\Samples\P001235.pdf

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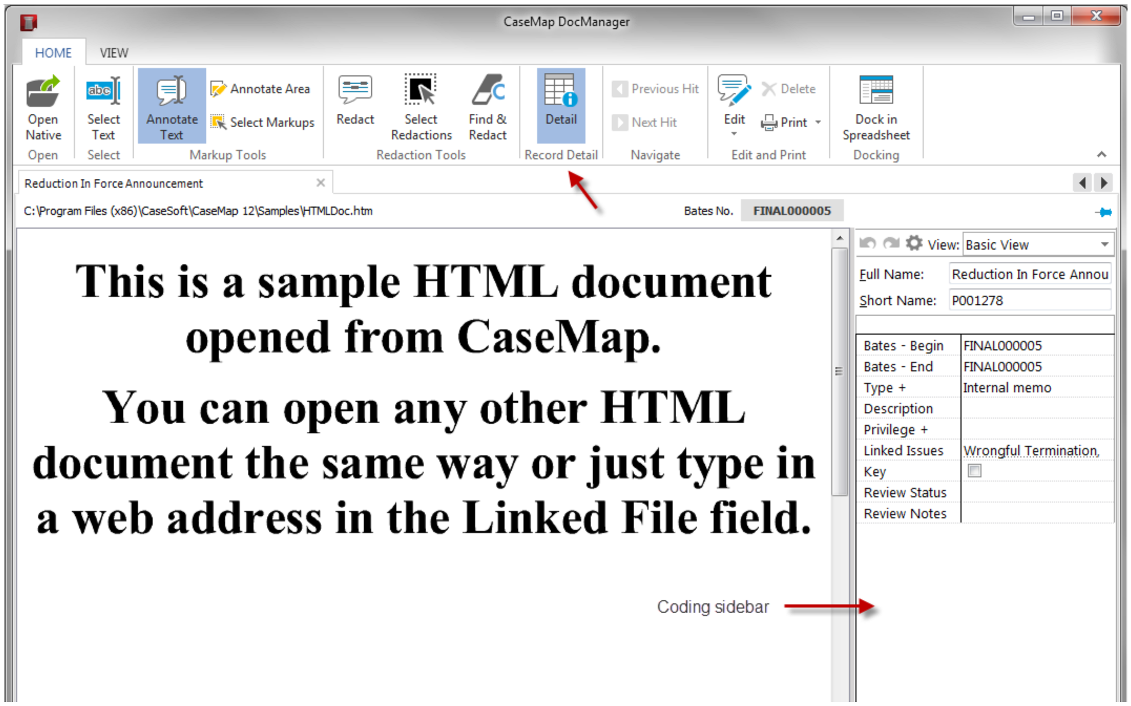
3. On the **Home** ribbon of the DocManager, click the Detail button.

The Document Coding Sidebar displays on the right side of the review screen, and the Detail button is highlighted.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Reduction In Force Announcement

C:\Program Files (x86)\CaseSoft\CaseMap 12\Samples\HTMLDoc.htm

Bates No. FINAL000005

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View: Basic View

Full Name: Reduction In Force Annou

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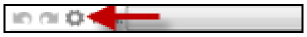
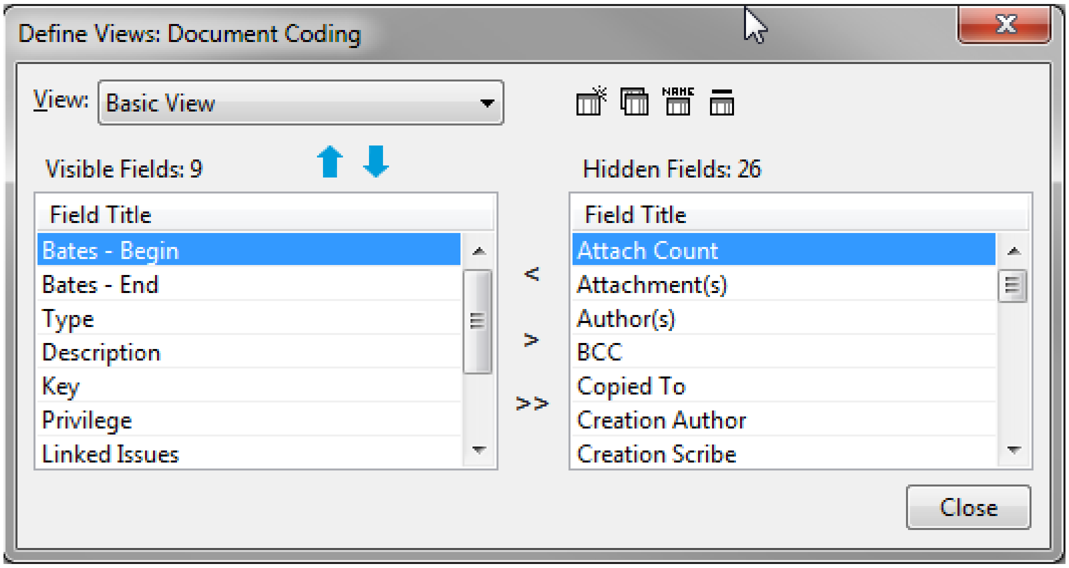
Clicking the Detail button allows you to toggle between the display/non-display of the Document Coding Sidebar.

4. In the **Document Coding Sidebar**, click the cogwheel icon to display the **Define Views** dialog box.




Define Views: Document Coding
<
>
>>
Close

View: Basic View

Visible Fields: 9

| Field Title |
|---|
| Bates - Begin |
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| Type |
| Description |
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Hidden Fields: 26

| Field Title |
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5. In the **View** area of the **Define Views** dialog box, select a view from the menu list.

6. To modify a selected view, perform one of the following:

   ### Hiding fields

   a. In the **Visible Fields** column of the **Define Views** dialog box, select/double-click on a selected field to move it to the **Hidden Fields** column.

   b. Repeat **Step a** as desired.

   c. Optional: In the **Visible Fields** column, select a field and then click the **Up** ⬆ or the **Down** ⬇ arrow to locate the remaining fields as desired.

   d. Click **Close**.

   ### Making fields visible

   a. In the **Hidden Fields** column of the **Define Views** dialog box, select/double-click on a selected field to move it to the **Visible Fields** column.

   b. Repeat **Step a** as desired.

   c. Optional: In the **Visible Fields** column, select a field and then click the **Up** ⬆ or the **Down** ⬇ arrow to place it in a desired location.

   d. Repeat **Step c** as needed.

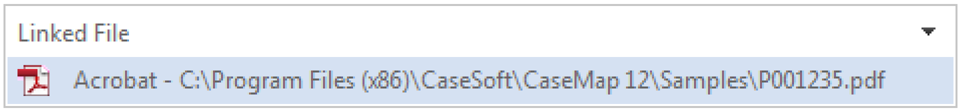
   e. Click **Close**.

You can adjust the height of description fields displayed in the Document Coding Sidebar.

### ⊟ Adjusting the height of description fields

1. In the **Documents** spreadsheet, click on the paperclip icon for the linked file you want to view.

2. Click on the linked file to open it.

   Linked File

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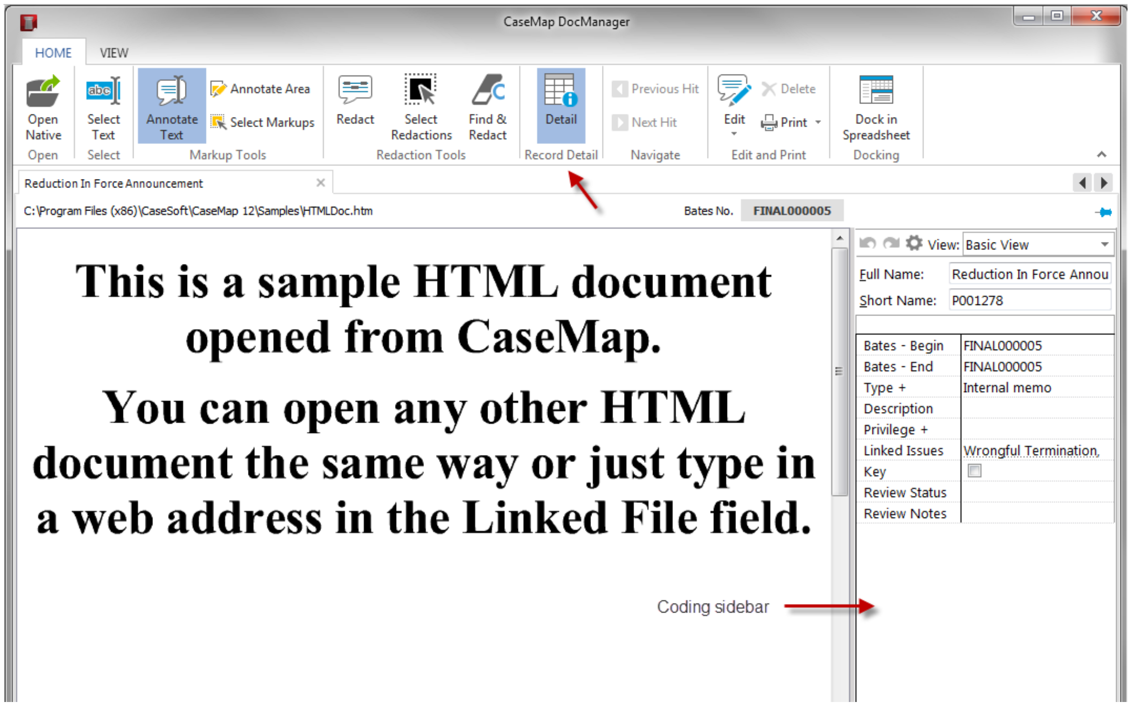
3. On the **Home** ribbon of the DocManager, click the Detail button.

   The Document Coding Sidebar displays on the right side of the review screen, and the

Detail button is highlighted.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| Review Notes | |

Multiple clicks of the Detail button allows you to toggle between the display/non-display of the Document Coding Sidebar.

4. In the **Document Coding Sidebar**, place (hover) the mouse over/between a description fields until the pointer changes to a ⇕.

5. When the pointer changes to a ⇕, click on drag the pointer to a desired location to increase/decrease the size of the field.

Fields can not be less than one line in height, and therefore, adjustments smaller than a line are not allowed.

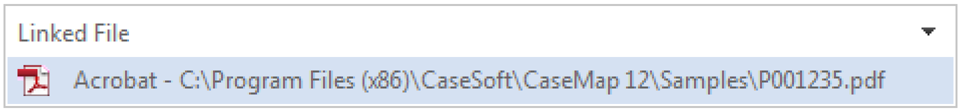
6. Repeat these steps as necessary.

You can drag and drop the field sort order as they are displayed in the Document Coding Sidebar.

### Adjusting the fields sort order

1. In the **Documents** spreadsheet, click on the paperclip icon for the linked file you want to view.

2. Click on the linked file to open it.



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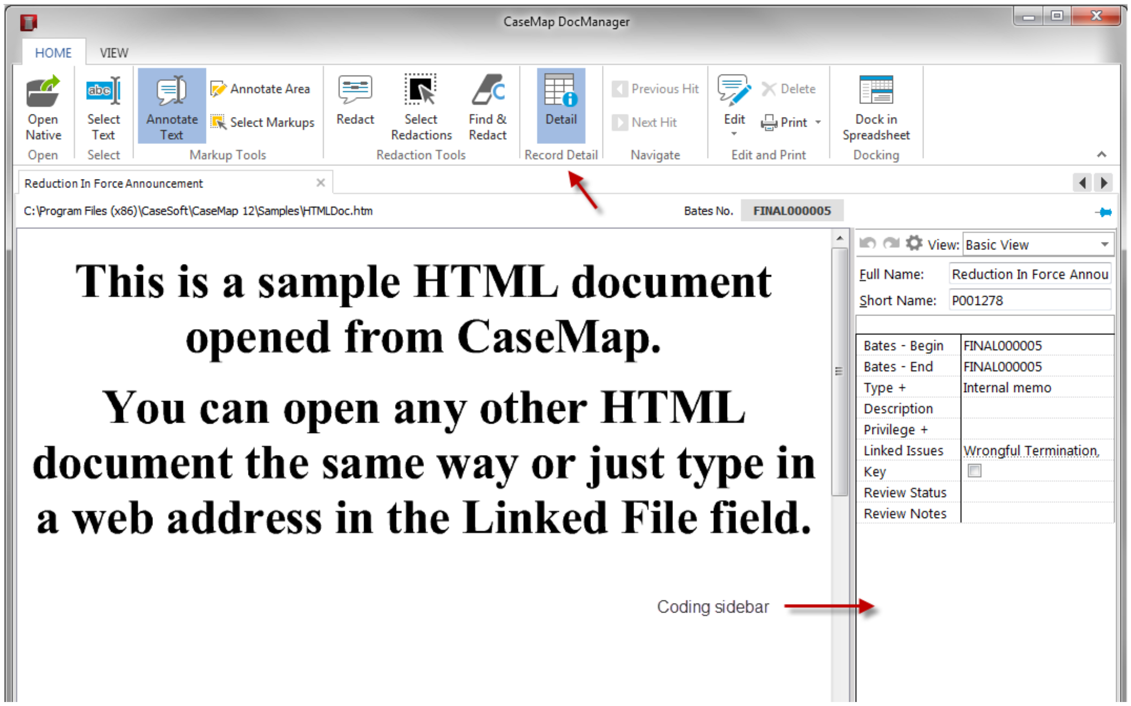
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Next Hit
Navigate
Edit
Delete
Print
Edit and Print
Dock in Spreadsheet
Docking
Coding sidebar

Reduction In Force Announcement

C:\Program Files (x86)\CaseSoft\CaseMap 12\Samples\HTMLDoc.htm

Bates No. FINAL000005

**This is a sample HTML document opened from CaseMap.**

**You can open any other HTML document the same way or just type in a web address in the Linked File field.**

View: Basic View

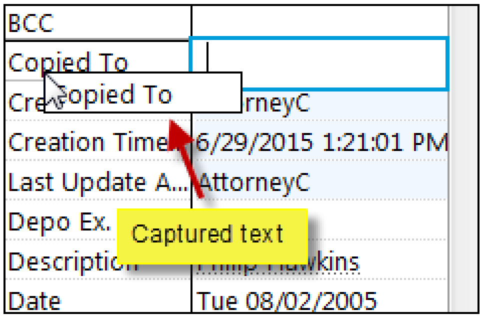
Full Name: Reduction In Force Annou

Short Name: P001278

| | |
|---|---|
| Bates - Begin | FINAL000005 |
| Bates - End | FINAL000005 |
| Type + | Internal memo |
| Description | |
| Privilege + | |
| Linked Issues | Wrongful Termination, |
| Key | ☐ |
| Review Status | |
| Review Notes | |

Multiple clicks of the button allows you to toggle between the display/non-display of the Document Coding Sidebar.

4. In the **Document Coding Sidebar**, click in a field to capture the data.


BCC
Copied To
Creation Time 6/29/2015 1:21:01 PM
Last Update A... AttorneyC
Depo Ex.
Description
Date Tue 08/02/2005

5. When the content of the field has been captured, drag and drop the field to a new location within the sidebar.

   The field and its association data/field is moved in conjunction.

6. Repeat Step 4 and Step 5 as necessary.

7. In the **Document Coding Sidebar**, click the cogwheel icon to display the **Define Views** dialog box.

8. Above the **Hidden Fields** area of the **Define Views** dialog box, define a view based on the new field sort order using one of the Define Views icons. See Customizing View Options for more information.

Related Topics

About DocManager
Viewing documents and images
Navigating documents
Adjusting document size
Docking and undocking the DocManager

## Navigating documents

Use the Page Control toolbar at the bottom left of DocManager to navigate documents or images. You can easily identify what page of the document you are viewing in relation to the total number of pages or jump to a particular page within the document that you want to view. You can also navigate documents or images using menus, shortcut keys, and right-click options.

Search hits within a document or image can also be navigated by using the buttons in the lower left corner of DocManager. Search hits are highlighted in blue so you can easily locate them within a document. If a document has more than 30 pages, search hits will not display in DocManager (by default). You can click on the document tab to turn on search hit highlighting for large documents. Or you can modify this setting. For more information, see Changing DocManager options.

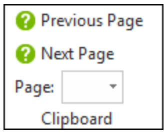
### ⊟ To navigate search hits

Search hits are highlighted in documents so that you can locate and navigate them easily. The current search hit is highlighted in blue. All other search hits are highlighted in yellow.

To navigate search hits, click on the **Previous Hit** Previous Hit and **Next Hit** Next Hit buttons on the Home ribbon. You can also click on or type in a number in the Page list to jump to that page in the document.

### ⊟ To navigate pages

On the Home ribbon, click the following buttons to navigate document records:



- Previous Page moves to the previous page
- Next Page moves to the next page
- Page List allows you to specify the page you want to view.

You can type a page number and press ENTER, or click on the page number in the drop-down list.

Related Topics

[About DocManager]
[Viewing documents and images]
[Adjusting document size]
[Docking and undocking the DocManager]

## Adjusting document size

You can adjust the document or image size in DocManager to enhance personal viewing. This is especially helpful depending on the document or particular content you are working with. For instance, handwritten documents are harder to read online and perhaps illegible in some instances. Choose the viewing tool that best allows you adjust the document so you can read with ease. Resizing tools are located at the bottom of the DocManager window.

You can rotate images in 90 degree increments to easily view spreadsheets in landscape view. The Placekeeper settings allow you to rotate the document left or right to landscape view and keep it there while viewing the document.

### ⊟ To adjust the document or image size

1. Open the document you want to view.

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

2. Click the **View ribbon**, and then click **Fit Entire Page** icon to view the full document.

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

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

3. Click the **Fit Page Width** 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 and then click Zoom > Fit Width.

4. For custom view magnification, use the sliding magnification scale in the lower right corner.

   Or click the View and then click the .

### To rotate a document or image

1. Open the document you want to view.

2. Click the **Rotate 90** button to rotate the document or image to the left in 90 degree increments.

   You can also use keyboard shortcuts:

   - Rotate Clockwise (CTRL + SPACE)
   - Rotate Counterclockwise (CTRL + SHIFT + SPACE)

   The document will stay in this position as you scroll through all pages of the document. When you navigate to a new document, it will be resized to the Fit Width size.

Related Topics

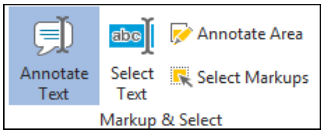
[About DocManager]
[Viewing documents and images]
[Navigating documents]

## Annotating documents

You can easily annotate any document in DocManager. All annotations applied to a document can be viewed by all case users. And any user can add notes to any annotation. When you type a note, the spell checking tool is enabled to catch any misspellings that might occur.

All annotations display in yellow (by default), so you can easily locate them in a document. You can change the color of the annotations for your personal viewing preferences. For example, you can change the annotation color to green for your view and another user can change the annotation color to blue for his or her view. When annotations are printed, the color setting can also be changed for the printed output color — without affecting your personal view color.

DocManager has four different modes depending on the task you need to do. When a document displays in DocManager, the Annotate Text mode is selected by default.



***DocManager includes four annotation modes:***

- **Annotate Text** — allows you to select highlight and annotate selected text (default mode).
- **Select Text** — allows you to view annotation content already applied to the document or image.
- **Annotate Area** — allows you to highlight and annotate a region or graphic on the document.
- **Select Markups** — allows you to select an annotation for editing.

When multiple annotations are applied to a document, you can navigate from one to the next using the Next Annotation and Previous Annotation buttons in the Edit Annotation dialog box. See Editing annotations.

Annotations applied to an image will not include any image text that displays underneath the annotation. But once the image has been OCR processed, CaseMap will include the underlying text when a new fact record is created for the annotation. See Creating new facts/extracts from annotations.

For information on changing annotation default options or hit highlighting options, see Changing DocManager options.

### To select text

1. From the **Annotation mode** list, click **Select Text**.
2. Place your mouse pointer over an annotation to view the note in a pop-up window.

   If there is not a note associated with the annotation, no text displays.
3. In the **Note** tab, type in information you want.
4. Click **OK**.

### To select an annotation

You can only select one annotation at a time.

1. From the **Annotation mode** list, click **Select Markups**.
2. Click on the annotation you want to select for editing.

   The selected annotation now displays outlined in a rectangle to distinguish it from other annotations in the document.

   For more information on editing, see Editing annotations.

### ⊟ To annotate text

1. From the **Annotation mode** list, click **Annotate Text**.
2. Drag your mouse pointer over the text you want to annotate to open the New Annotation dialog box.

   The text you selected displays in the Document Text box.

3. In the **Note** tab, type in information you want, then click **OK**.
4. Click on the **Annotations** button and then click **Select Text**.
5. Place your mouse pointer over the highlighted text in the image to view the note text.

### ⊟ To annotate an area or graphic

CaseMap will only index text from a graphic if the document has been OCR-processed as an image.

1. From the **Annotation mode** list, click **Annotate Area**.

> You can resize or move area annotations in Select Annotations mode. Select the annotation and adjust the annotation size as needed.

2. Drag your mouse pointer over the area or graphic you want to annotate to open the New Annotation dialog box.
3. In the **Note** tab, type in information you want, then click **OK**.
4. Click on the **Annotations** button and then click **Select Text**.
5. Place your mouse pointer over the highlighted area or graphic in the image to view the user's short name, the date/time it was applied, and the note text.

Related Topics

About DocManager
Create new facts/extracts from annotations
Editing annotations
Deleting annotations
Printing annotations
Docking and undocking the DocManager

## Creating new facts/extracts from annotations

When reviewing documents in DocManager, you can create a new fact or research extract record from an annotation using the Send to CaseMap tool. The annotated text and any notes applied to the annotation will display in the Fact Text field on the Facts spreadsheet, or in the Extract Text field in the Extracts from Authorities and Authorities and Extracts research spreadsheets.

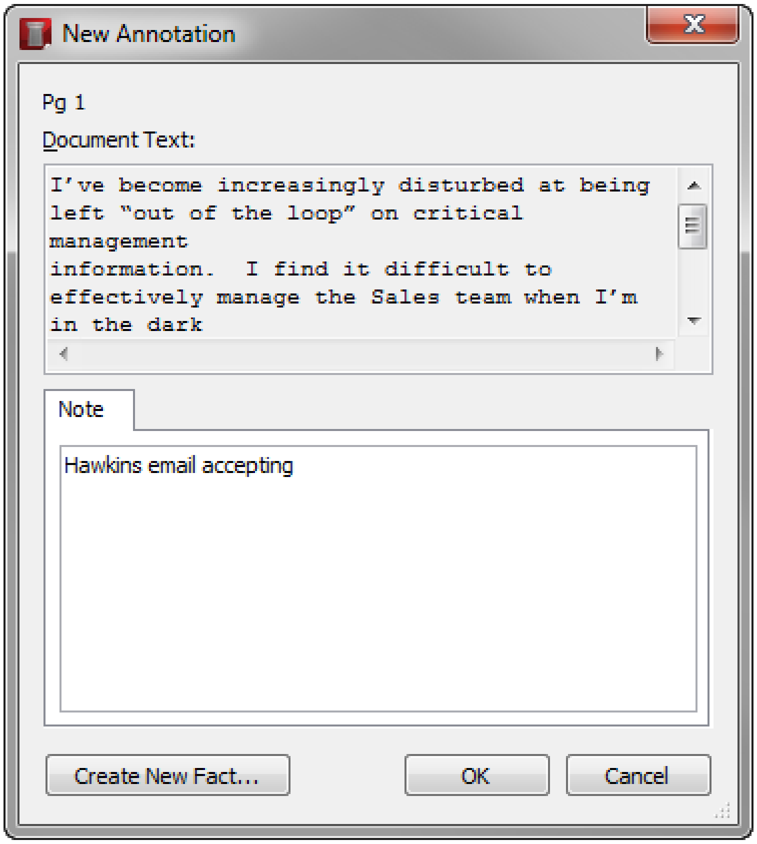
The document is linked to the case record and the page number for the annotation location displays in the Source(s) field of the Facts spreadsheet, or the Linked File field for research spreadsheets. When you click on the paperclip icon for the document record, it displays in DocManager on the page where the annotation text is located.

If you want to view or modify record detail for the document you are reviewing, you can access the record detail dialog box directly from DocManager by clicking Record Detail button.

### ⊟ To create a new fact from an annotation

1. Open a document in **DocManager** and click **Annotate Text**.

2. Drag your mouse pointer over the text you want to annotate to open the **New Annotation** dialog box.



Pg 1

Document Text:

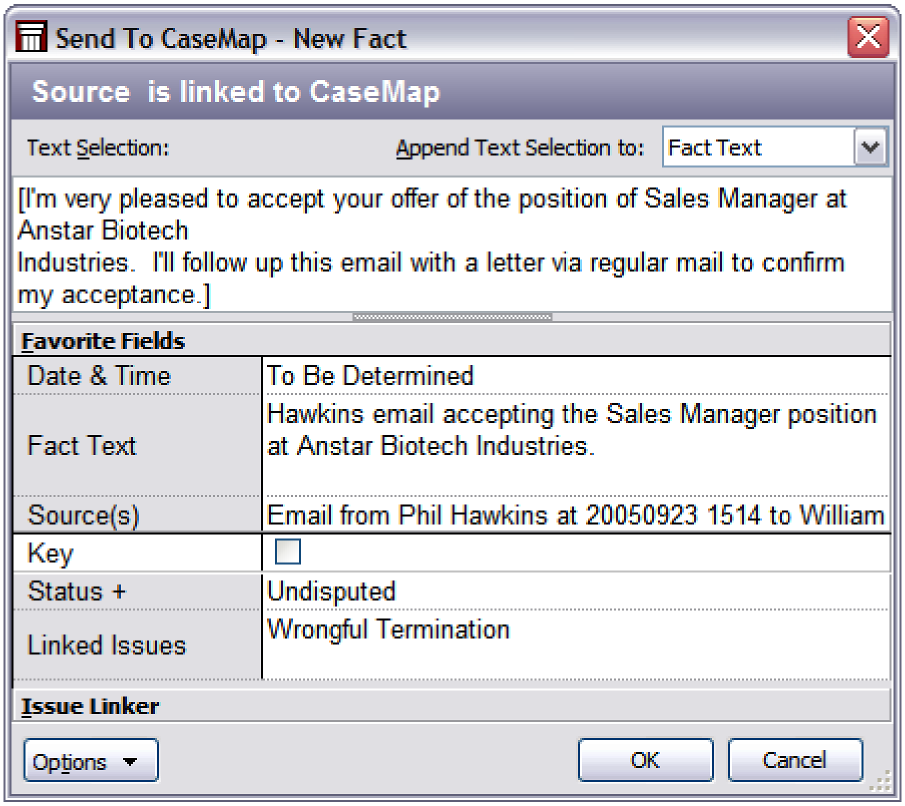
```
I've become increasingly disturbed at being
left "out of the loop" on critical
management
information.  I find it difficult to
effectively manage the Sales team when I'm
in the dark
```

Hawkins email accepting

The text you selected displays in the Document Text box.

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

   Notice that the excerpt you highlighted in the document now displays in the Text Selection field and is enclosed in brackets.


Send To CaseMap - New Fact
Source is linked to CaseMap
Text Selection:
Append Text Selection to:
Fact Text
Favorite Fields
Issue Linker
Options
OK
Cancel

[I'm very pleased to accept your offer of the position of Sales Manager at Anstar Biotech Industries. I'll follow up this email with a letter via regular mail to confirm my acceptance.]

| | |
|---|---|
| Date & Time | To Be Determined |
| Fact Text | Hawkins email accepting the Sales Manager position at Anstar Biotech Industries. |
| Source(s) | Email from Phil Hawkins at 20050923 1514 to William |
| Key | ☐ |
| Status + | Undisputed |
| Linked Issues | Wrongful Termination |

⚠ 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.

8. In the **Date & Time** field, type in the date of the fact.

9. In the **Fact Text** field, type in a short description of the fact, using short names to link the fact automatically to people entered in the Persons spreadsheet.

   This text description will display in the Fact Text field in the Facts spreadsheet.

10. Select the **Key** check box, if this fact record is important to the case.

11. In the **Status** field, select whether the fact is disputed or not.

12. In the **Linked Issues** field, type in the short name for any issues you want to link to this fact.

13. You can click the **Issue Linker** bar to select check boxes for each issue you want to link to the fact.

14. When you are finished, click **OK** to send the fact to CaseMap.

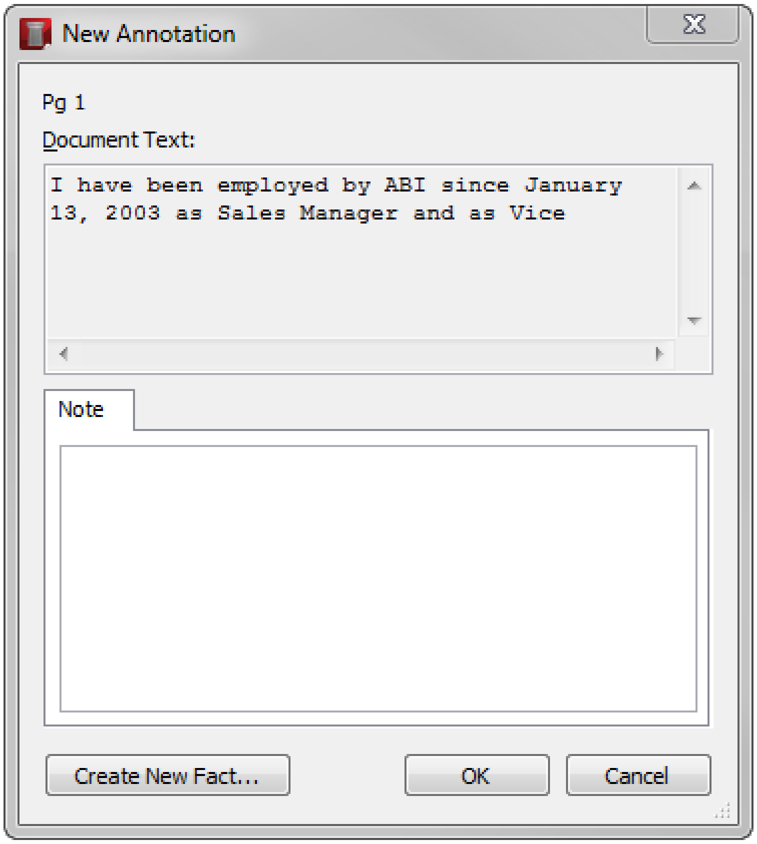
15. In the message box, click **Yes** to view the new fact in CaseMap.

    Notice that the new fact now displays in the Facts spreadsheet and is sorted according to the date.

### To create a new extract from an annotation

1. From the **Annotation mode** list, click **Annotate Text**.

2. Drag your mouse pointer over the text you want to annotate to open the New Annotation dialog box.



Pg 1

Document Text:

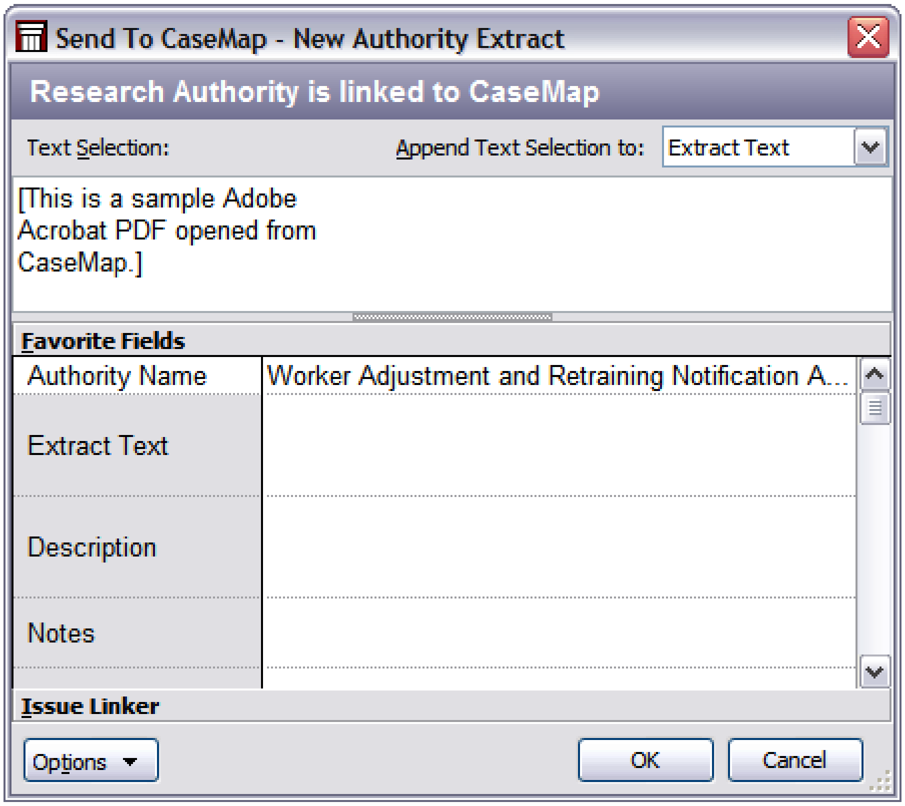
```
I have been employed by ABI since January
13, 2003 as Sales Manager and as Vice
```

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 Extract** button to open the Send to CaseMap - New Extract dialog box.

   Notice that the excerpt you highlighted in the document now displays in the Text Selection field and is enclosed in brackets. The brackets indicate that a link is set from the extract record to the source file.


Send To CaseMap - New Authority Extract
Research Authority is linked to CaseMap
Favorite Fields
Issue Linker
Options
OK
Cancel

Text Selection:

[This is a sample Adobe Acrobat PDF opened from CaseMap.]

Append Text Selection to: Extract Text

Authority Name: Worker Adjustment and Retraining Notification A...

Extract Text:

Description:

Notes:

⚠ 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.

5. In the **Text Selection** field, review the extract you highlighted in the extract file.
6. Type in any additional field information you want to add to the extract record.
7. Click on the **Issue Linker** bar at the bottom of the box and select check boxes for applicable issues to link this extract.
8. When you are finished, click **OK**.
9. In the **Case Shortcuts** pane, click on the **Extracts and Authorities** spreadsheet.

   The new extract record displays with a link to the source file and the annotated text displaying in the Extract Text field.

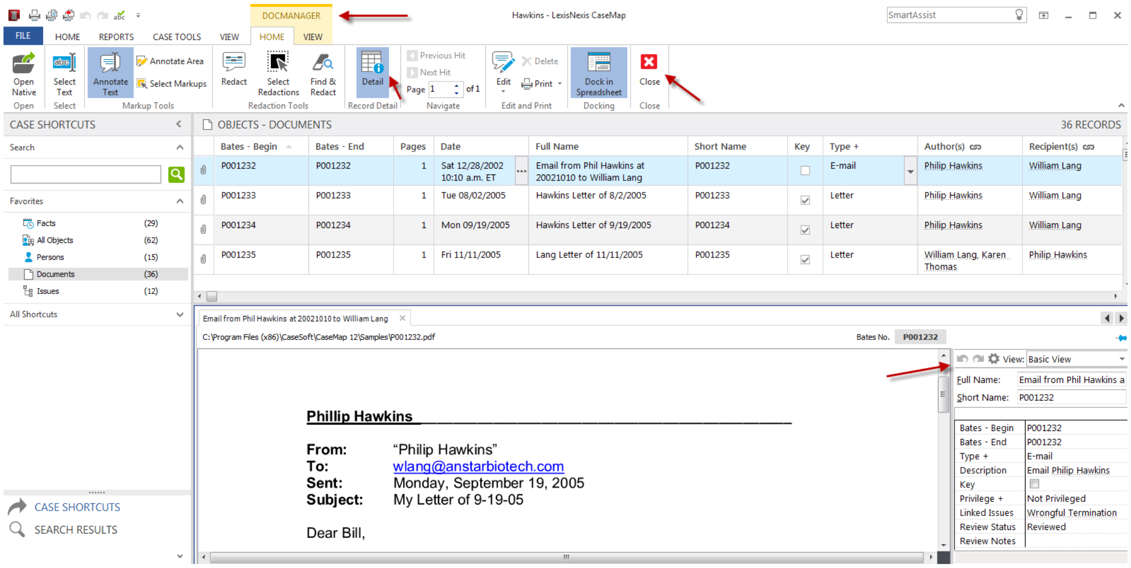
### ⊟ To view record detail

1. On the **DocManager** toolbar, click the **Detail** button.

   You can also click the Home ribbon and then click Detail Detail.

   The Detail button is highlighted and the Detail sidebar is displayed to the right side of the document in the DocManager.

Once a document is closed and reopened, the Record Detail Sidebar no longer exist and must be re-established.


DOCMANAGER
Hawkins - LexisNexis CaseMap
SmartAssist
FILE
HOME
REPORTS
CASE TOOLS
VIEW
HOME
VIEW
Open Native
Select Text
Annotate Text
Annotate Area
Select Markups
Redact
Select Redactions
Find & Redact
Detail
Previous Hit
Next Hit
Page 1 of 1
Edit
Delete
Print
Dock in Spreadsheet
Close
Open
Select
Markup Tools
Redaction Tools
Record Detail
Navigate
Edit and Print
Docking
Close
CASE SHORTCUTS
Search
Favorites
Facts (29)
All Objects (62)
Persons (15)
Documents (36)
Issues (12)
All Shortcuts
CASE SHORTCUTS
SEARCH RESULTS
OBJECTS - DOCUMENTS
36 RECORDS
Email from Phil Hawkins at 20021010 to William Lang
C:\Program Files (x86)\CaseSoft\CaseMap 12\Samples\P001232.pdf
Bates No. P001232
View: Basic View

| Bates - Begin | Bates - End | Pages | Date | Full Name | Short Name | Key | Type + | Author(s) | Recipient(s) |
|---|---|---|---|---|---|---|---|---|---|
| P001232 | P001232 | 1 | Sat 12/28/2002 10:10 a.m. ET | Email from Phil Hawkins at 20021010 to William Lang | P001232 | ☐ | E-mail | Philip Hawkins | William Lang |
| P001233 | P001233 | 1 | Tue 08/02/2005 | Hawkins Letter of 8/2/2005 | P001233 | ☑ | Letter | Philip Hawkins | William Lang |
| P001234 | P001234 | 1 | Mon 09/19/2005 | Hawkins Letter of 9/19/2005 | P001234 | ☑ | Letter | Philip Hawkins | William Lang |
| P001235 | P001235 | 1 | Fri 11/11/2005 | Lang Letter of 11/11/2005 | P001235 | ☑ | Letter | William Lang, Karen Thomas | Philip Hawkins |

**Phillip Hawkins**

**From:** "Philip Hawkins"
**To:** wlang@anstarbiotech.com
**Sent:** Monday, September 19, 2005
**Subject:** My Letter of 9-19-05

Dear Bill,

Full Name: Email from Phil Hawkins a
Short Name: P001232

| | |
|---|---|
| Bates - Begin | P001232 |
| Bates - End | P001232 |
| Type + | E-mail |
| Description | Email Philip Hawkins |
| Key | ☐ |
| Privilege + | Not Privileged |
| Linked Issues | Wrongful Termination |
| Review Status | Reviewed |
| Review Notes | |

2. In the **Detail** dialog box, review and/or modify content for the case record.

3. Click the **Close** button to save your changes.

**Related Topics**

About DocManager
Annotating documents
Editing annotations
Deleting annotations
Printing annotations
Docking and undocking the DocManager

## Search in DocManager

DocManager provides a search tool that allows you to search within the document and optionally filter results by whole word, and then move between search hits.

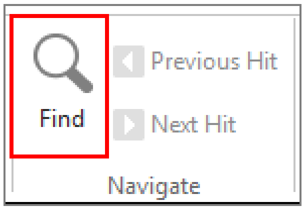
### ⊟ Finding words or phrases

1. Open the Documents spreadsheet.
   In the **Case Shortcuts** pane, click **Documents**.

2. Double-click the paperclip icon to open a linked document.

The document opens in CaseMap DocManager.

3. Click the **Find** button.



4. Type the search word or phrase. Optionally, select the **Find whole word only** check box to search/find whole words only.

5. Click **Find**.

   The term(s) are highlighted in the document. A message displays if no matches are found.

6. To move between search hits, click **Next Hit** or **Previous Hit**.

Related Topics

About DocManager
Changing DocManager options
Docking and undocking the DocManager

## Creating a new redaction

When reviewing documents in DocManager, you can create a new redaction using the Redaction tools located on the Home ribbon of the DocManager. The Redaction tools which consists of the 'Redact', 'Select Redactions', and the Find & Redact buttons are enabled when working with files that are linked with the object type (spreadsheet) of Documents.

- **Redact** — allows you to select and highlight the confidential text/information [words, sentences, paragraphs/area of text, or an image(s)] to black out/hide in the document
- **Select Redactions** — allows you to select the highlighted confidential text/information in the document
- **Find & Redact** — allows you to find words or phrases to redact in the current document

### ⊟ Creating a new redaction

1. In the **Case Shortcuts** pane, click **Documents** to navigate to the Documents spreadsheet.

2. In the **Documents** spreadsheet, click the linked document (paperclip icon) to be

redacted.

3. In the **Linked File** dialog box, click on the selected file to be opened.

If CaseMap DocManager is not activated, you will be prompted activate it at the time you're attempting to view a document, or to obtain a trial copy. If you do not have a license, contact Support ((800) 543-6862).

CaseMap DocManager opens displaying the selected linked file.

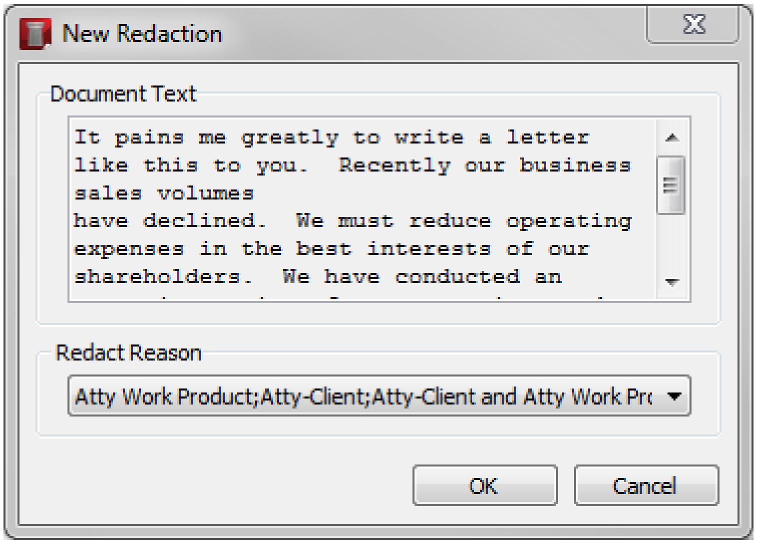
Once the 'Dock in Spreadsheet' option to view documents has been selected in the DocManager, all subsequent document viewings will be done via the DocManager being docked within the CaseMap application. See Docking and undocking the DocManager for more information.

4. In **CaseMap DocManager**, click the **Home** ribbon.

5. Click the **Redact** button.

6. In the linked document, select and highlight the information [word(s), sentence(s), paragraph(s)/area of text, or image(s)] to hide/blacken out.

   The New Redaction dialog box opens.



New Redaction

Document Text

```
It pains me greatly to write a letter
like this to you.  Recently our business
sales volumes
have declined.  We must reduce operating
expenses in the best interests of our
shareholders.  We have conducted an
```

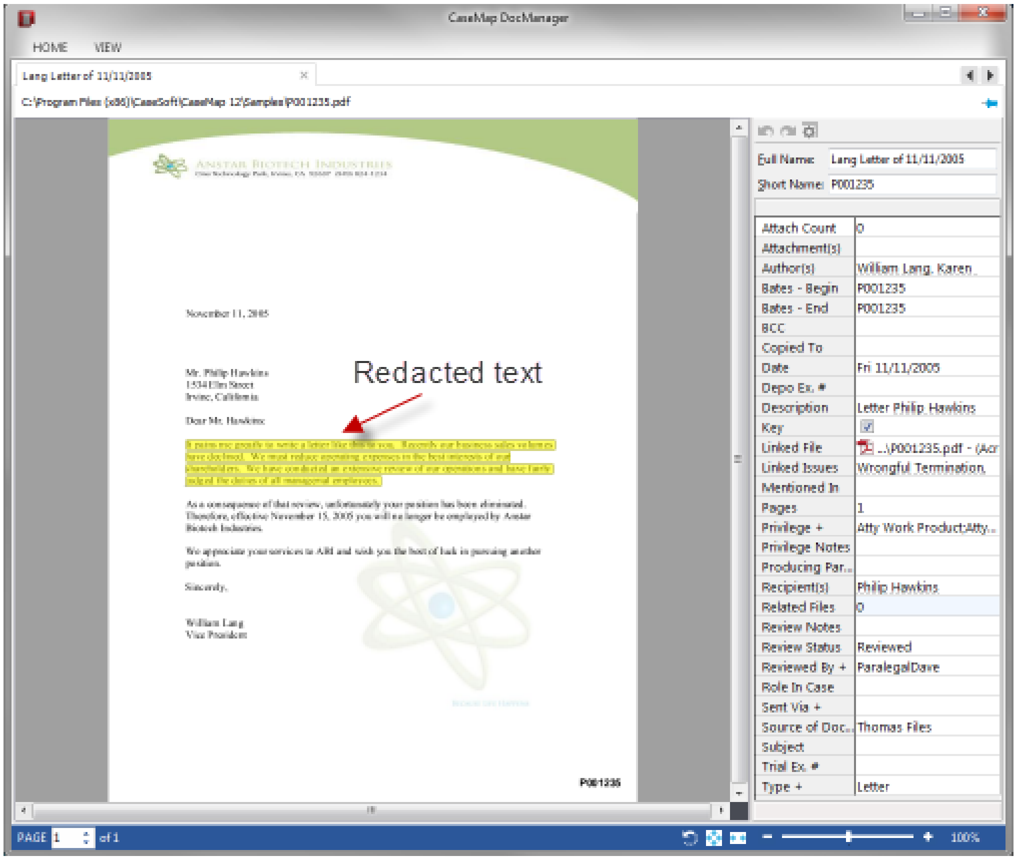
Redact Reason

Atty Work Product;Atty-Client;Atty-Client and Atty Work Pr

7. In the **Document Text** area of the **New Redaction** dialog box, review the redacted text for accuracy.

8. In the **Redact Reason** area of the **New Redaction** dialog box, select a reason for the redaction using the drop-down menu.

9. Click **OK** to save the operation.


CaseMap DocManager
HOME
VIEW
Lang Letter of 11/11/2005
C:\Program Files (x86)\CaseSoft\CaseMap 12\Samples\P001235.pdf
Redacted text
P001235
PAGE 1 of 1
100%

Full Name: Lang Letter of 11/11/2005
Short Name: P001235

| | |
|---|---|
| Attach Count | 0 |
| Attachment(s) | |
| Author(s) | William Lang, Karen |
| Bates - Begin | P001235 |
| Bates - End | P001235 |
| BCC | |
| Copied To | |
| Date | Fri 11/11/2005 |
| Depo Ex. # | |
| Description | Letter Philip Hawkins |
| Key | ☑ |
| Linked File | ..\P001235.pdf - (Acr |
| Linked Issues | Wrongful Termination, |
| Mentioned In | |
| Pages | 1 |
| Privilege + | Atty Work Product;Atty... |
| Privilege Notes | |
| Producing Par... | |
| Recipient(s) | Philip Hawkins |
| Related Files | 0 |
| Review Notes | |
| Review Status | Reviewed |
| Reviewed By + | ParalegalDave |
| Role In Case | |
| Sent Via + | |
| Source of Doc... | Thomas Files |
| Subject | |
| Trial Ex. # | |
| Type + | Letter |

10. Review the redacted text for accuracy and close the document.

Related Topics

[About DocManager]()
[Viewing documents and images]()
[Viewing a redaction reason]()
[Finding and redacting text]()
[Editing a redaction]()
[Deleting a redaction]()
[Changing DocManager options]()
[Docking and undocking the DocManager]()

## Viewing a redaction reason

After creating a redaction, there may be times that you will want to view a redaction to see why the contents of the document was redacted.

## To view a redaction reason

1. In the **Case Shortcuts** pane, click **Documents** to navigate to the Documents spreadsheet.
2. In the **Documents** spreadsheet, select and click on the linked document (paperclip icon) to be viewed.

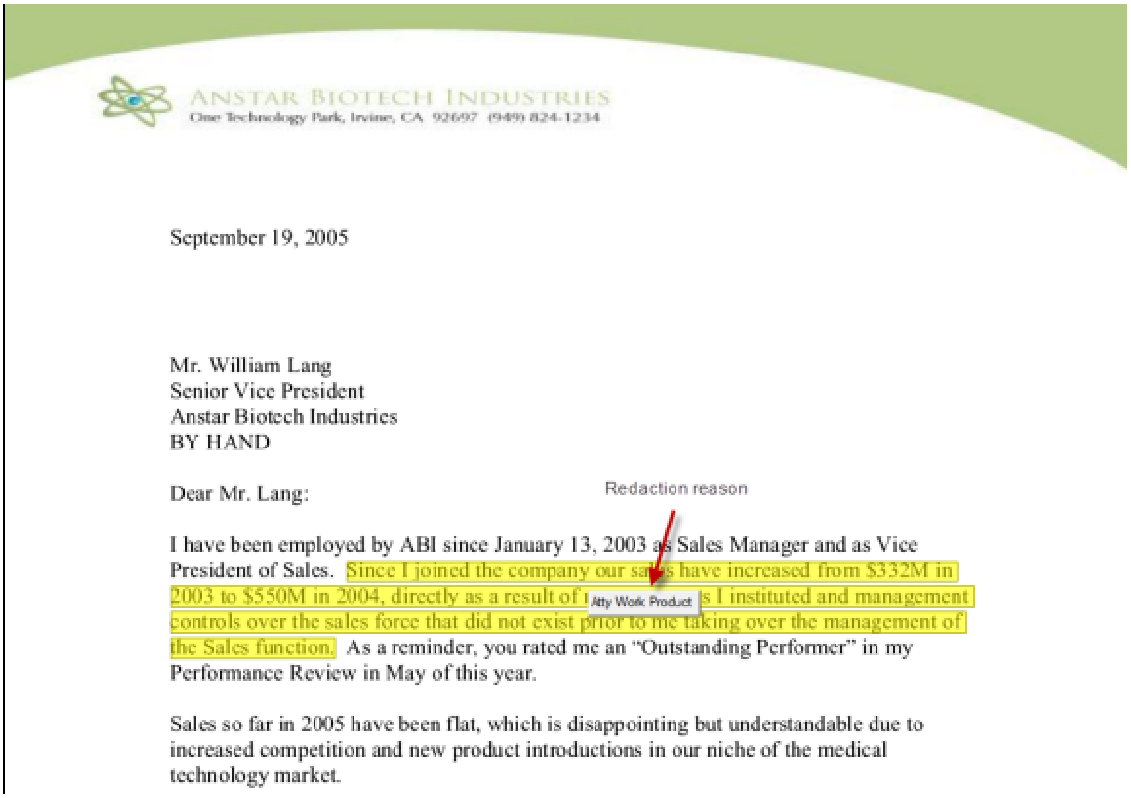
> If CaseMap DocManager is not activated, you will be prompted activate it at the time you're attempting to view a document, or to obtain a trial copy. If you do not have a license, contact Support ((800) 543-6862).

CaseMap DocManager opens displaying the selected linked file.

> If the 'Dock in Spreadsheet' option to view documents had been selected in the DocManager for a previous document viewing, then all subsequent document viewings will be done via the DocManager being docked within the CaseMap application. See Docking and undocking the DocManager for more information.

3. In the **DocManager**, click the **Home** ribbon.
4. On the **Home** tab, click the **Select Text** button, and then hover the mouse over the created redaction.

   The redaction reason is displayed for viewing.



ANSTAR BIOTECH INDUSTRIES
One Technology Park, Irvine, CA 92697 (949) 824-1234

September 19, 2005

Mr. William Lang
Senior Vice President
Anstar Biotech Industries
BY HAND

Dear Mr. Lang:

I have been employed by ABI since January 13, 2003 as Sales Manager and as Vice President of Sales. Since I joined the company our sales have increased from $332M in 2003 to $550M in 2004, directly as a result of s I instituted and management controls over the sales force that did not exist prior to me taking over the management of the Sales function. As a reminder, you rated me an "Outstanding Performer" in my Performance Review in May of this year.

Sales so far in 2005 have been flat, which is disappointing but understandable due to increased competition and new product introductions in our niche of the medical technology market.

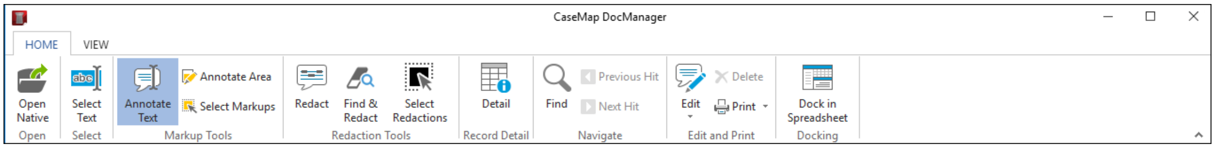
5. Click the **Close** button to end.

Related Topics

[About DocManager]
[Viewing documents and images]
[Creating a new redaction]
[Editing a redaction]
[Finding and redacting text]
[Deleting a redaction]
[Docking and undocking the DocManager]
[Changing DocManager options]

## Finding and redacting text

You can use DocManager to redact search results within a document.


CaseMap DocManager
HOME
VIEW
Open Native
Open
Select Text
Select
Annotate Text
Annotate Area
Select Markups
Markup Tools
Redact
Find & Redact
Select Redactions
Redaction Tools
Detail
Record Detail
Find
Previous Hit
Next Hit
Navigate
Edit
Delete
Print
Edit and Print
Dock in Spreadsheet
Docking

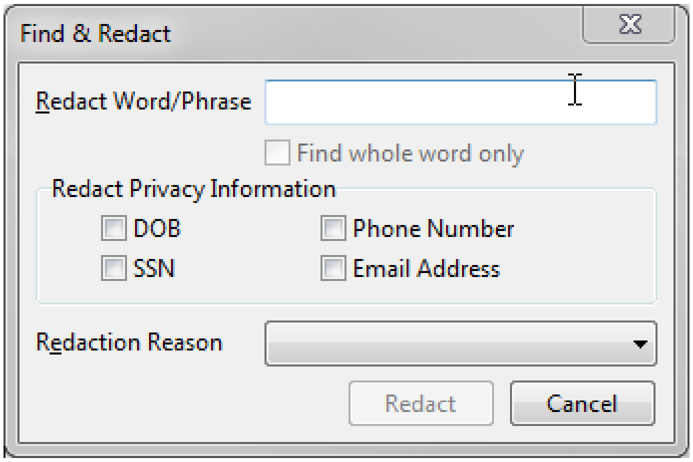
### ⊟ Redacting search results

1. In the **Case Shortcuts** pane, click **Documents** to navigate to the Documents spreadsheet.

2. In the **Documents** spreadsheet, double-click the linked document (paperclip icon) to open the record to be searched.

   The CaseMap DocManager opens.

3. Click the **Find & Redact** button to open the Find & Redact dialog box.


Find & Redact
Redact Word/Phrase
☐ Find whole word only
Redact Privacy Information
☐ DOB
☐ Phone Number
☐ SSN
☐ Email Address
Redaction Reason
Redact
Cancel

4. In the **Redact Word/Phrase** box, enter the search word or phrase.

5. Optional: Select the **Find whole word only** check box to search/find whole words only.

6. In the **Redact Privacy Information** area, select all applicable check boxes:

   DOB -- Date of Birth

   Phone Number

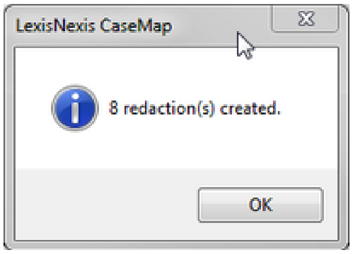
   Social Security number

   Email address

7. From the **Redaction Reason** drop-down list, select the redaction reason.

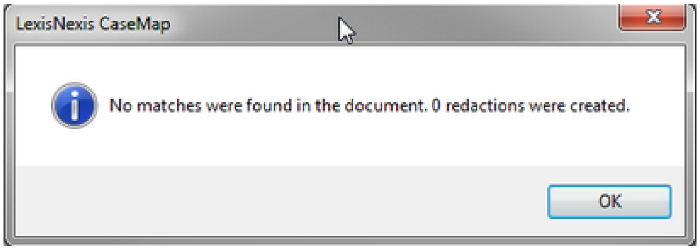
8. In the **Find & Redact** dialog box, click the **Redact** button to find and redact the searched text.

   A confirmation screen displays indicating the total number of redactions created.


LexisNexis CaseMap
OK

8 redaction(s) created.

If there are no matches for the searched term, the following dialog box displays:


LexisNexis CaseMap
OK

No matches were found in the document. 0 redactions were created.

9. Click **OK**.

Related Topics

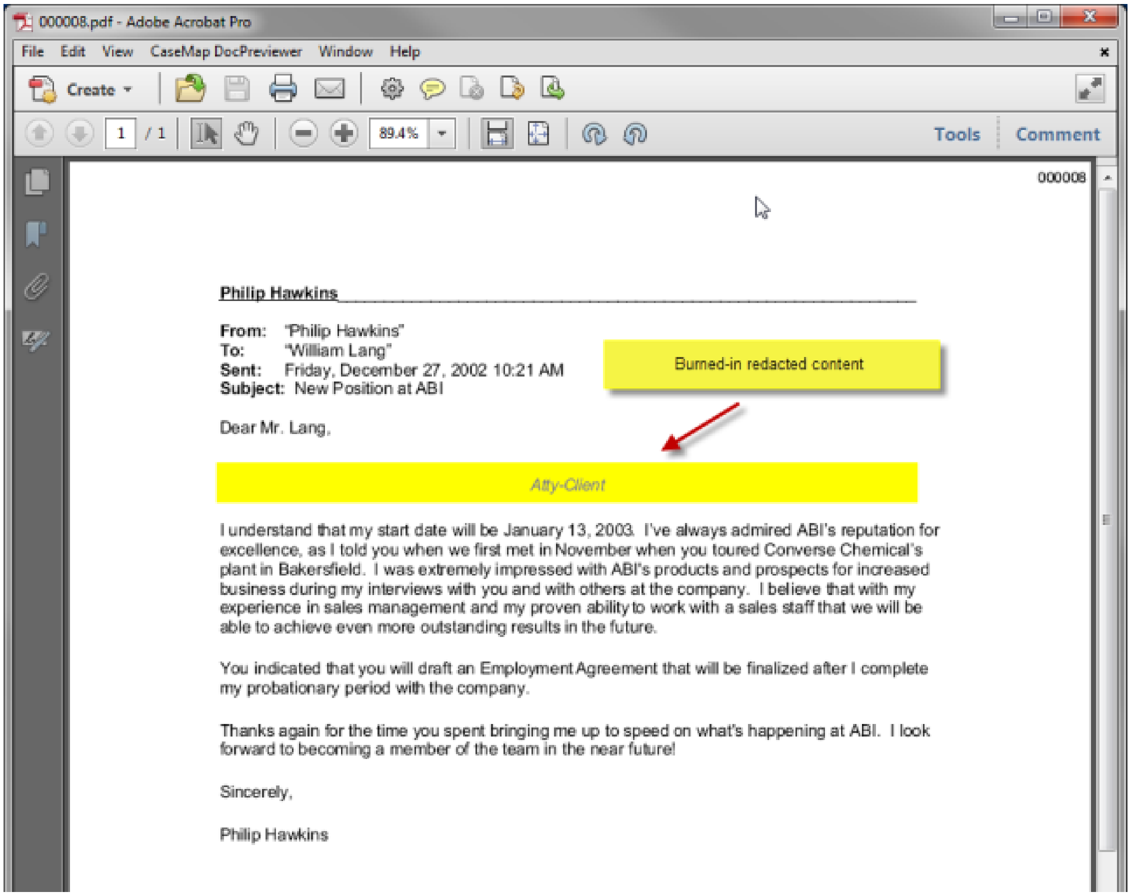
About DocManager
Creating a new redaction
Viewing a redaction reason
Editing a redaction
Deleting a redaction
Changing DocManager options
Docking and undocking the DocManager

## Documents with redactions burned in

To produce documents with redactions preserved, perform the following procedure:

⊟ **Producing burned in redaction documents**

1. Create a new redacted or locate the documents with the redacted contents.
2. Click the **Reports** tab and then click on the **Document Production** button to initiate the wizard.
3. When the **Document Production Wizard** opens, click **Next** to continue.
4. Complete the steps outlined in the wizard to create the production set with the redacted documents.
5. Go to the selected output storage destination/location and select a redacted document and verify that the document includes redacted content burned into the image.


000008.pdf - Adobe Acrobat Pro
File Edit View CaseMap DocPreviewer Window Help
Create
1 / 1
89.4%
Tools
Comment
000008

**Philip Hawkins**

**From:** "Philip Hawkins"
**To:** "William Lang"
**Sent:** Friday, December 27, 2002 10:21 AM
**Subject:** New Position at ABI

Burned-in redacted content

Dear Mr. Lang,

*Atty-Client*

I understand that my start date will be January 13, 2003. I've always admired ABI's reputation for excellence, as I told you when we first met in November when you toured Converse Chemical's plant in Bakersfield. I was extremely impressed with ABI's products and prospects for increased business during my interviews with you and with others at the company. I believe that with my experience in sales management and my proven ability to work with a sales staff that we will be able to achieve even more outstanding results in the future.

You indicated that you will draft an Employment Agreement that will be finalized after I complete my probationary period with the company.

Thanks again for the time you spent bringing me up to speed on what's happening at ABI. I look forward to becoming a member of the team in the near future!

Sincerely,

Philip Hawkins

Related Topics

Creating a new redaction
Editing a redaction
Viewing a redaction reason
Finding and redacting text
Deleting a redaction
Docking and undocking the DocManager

## Editing annotations

Editing annotations involves modifying note text, viewing update history, and deleting annotations. You must be in the Select Annotations mode to perform these tasks.

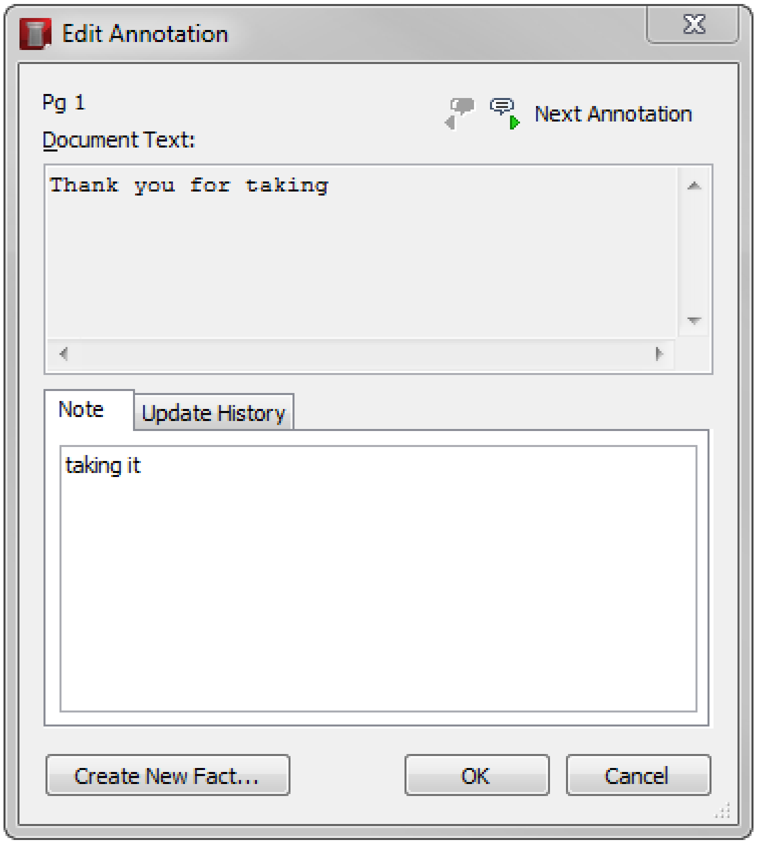
The Edit Annotation dialog box displays update history if more than one edit has occurred for an annotation or more than one note has been applied to the same highlighted text. The Update History tab displays the user's short name who created the annotation, the date and time it was created, the last user who updated it, and the date and time it was last updated.

### ⊟ To edit and navigate annotations

1. From the **Annotation mode** list, click **Select Markups**.
2. Double-click on the annotation you want to edit.

   You can also click on the annotation and then click the Edit button.

   The selected annotation displays outlined in a rectangle to distinguish it from other annotations in the document.
3. In the **Edit Annotation** dialog box, click the **Note** tab to edit note text.



Pg 1

Document Text:

Thank you for taking

taking it

4. Optional: Click the **Next Annotation** button to view and edit additional annotations in the document.

   As you navigate to the next annotation, your previous edits or note additions are automatically saved.

   As you navigate annotations, the current annotation is outlined in a rectangle in the document so you can easily locate it.

The Next and Previous Annotations buttons only display when editing an existing annotation.

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

### To view annotation history or properties

1. From the **Annotation mode** list, click **Select Markups**.
2. Double-click on the annotation you want to edit.

   You can also click on it and then click the Edit button.

   Or click the Edit menu and then click Annotation Properties.
3. In the **Edit Annotation** dialog box, click on the **Update History** tab to review the Creation Author, Last Update Author, and Date/Time information for the annotation.
4. Click **OK**.

Related Topics

About DocManager
Annotating documents
Creating new facts/extracts from annotations
Printing annotations
Docking and undocking the DocManager

## Editing a redaction

When editing a redaction, you have the ability to change/modify the redaction reason or the redaction selection itself. Utilizing the redaction Edit capabilities also provides you with access to CaseMap DocManager General, Printing, and Hit Highlighting options.

### To edit a redaction reason

1. In the **Case Shortcuts** pane, click **Documents** to navigate to the Documents spreadsheet.
2. In the **Documents** spreadsheet, select and click on the linked document (paperclip icon) to be opened/viewed.

   CaseMap DocManager opens displaying the selected linked file.

If the 'Dock in Spreadsheet' option to view documents had been selected in the

DocManager for a previous document viewing, then all subsequent document viewings will be done via the DocManager being docked within the CaseMap application. See Docking and undocking the DocManager for more information.

3. In the **DocManager**, click the **Home** ribbon, and then click **Select Redactions**.
4. In the document, select and click on a created redaction.

   The Edit button is enabled.
5. On the **Edit and Print** tab, click **Edit**, and then click **Redaction Properties**.

   The Edit Redaction dialog box displays.
6. In the **Document Text** area, verify that the correct redaction content is displayed.
7. In the **Redact Reason** area, use the drop-down arrow to select/change the redaction reason.
8. Click **OK** to save the changes and to close the **Edit Redaction** dialog box.
9. View the updated redaction reason for accuracy.

### To edit a redaction selection

1. In the **Case Shortcuts** pane, click **Documents** to navigate to the Documents spreadsheet.
2. In the **Documents** spreadsheet, select and click on the linked document (paperclip icon) to be opened/viewed.

   CaseMap DocManager opens displaying the selected linked file.

> If the 'Dock in Spreadsheet' option to view documents had been selected in the DocManager for a previous document viewing, then all subsequent document viewings will be done via the DocManager being docked within the CaseMap application. See Docking and undocking the DocManager for more information.

3. In the **DocManager**, click the **Home** ribbon, and then click **Select Redactions**.
4. Select and click on a redaction within the document.

   The selected redaction displays with the ability to adjust its width/height.
5. Make width/height adjustments to the redacted area as applicable.
6. On the **DocManager Home** ribbon, click the **Close** button to save changes/updates to the redaction selection.

### To edit DocManager Options

1. In the **Case Shortcuts** pane, click **Documents** to navigate to the Documents spreadsheet.
2. In the **Documents** spreadsheet, select and click on the linked document (paperclip icon) to be opened/viewed.

CaseMap DocManager opens displaying the selected linked file.

If the 'Dock in Spreadsheet' option to view documents had been selected in the DocManager for a previous document viewing, then all subsequent document viewings will be done via the DocManager being docked within the CaseMap application. See Docking and undocking the DocManager for more information.

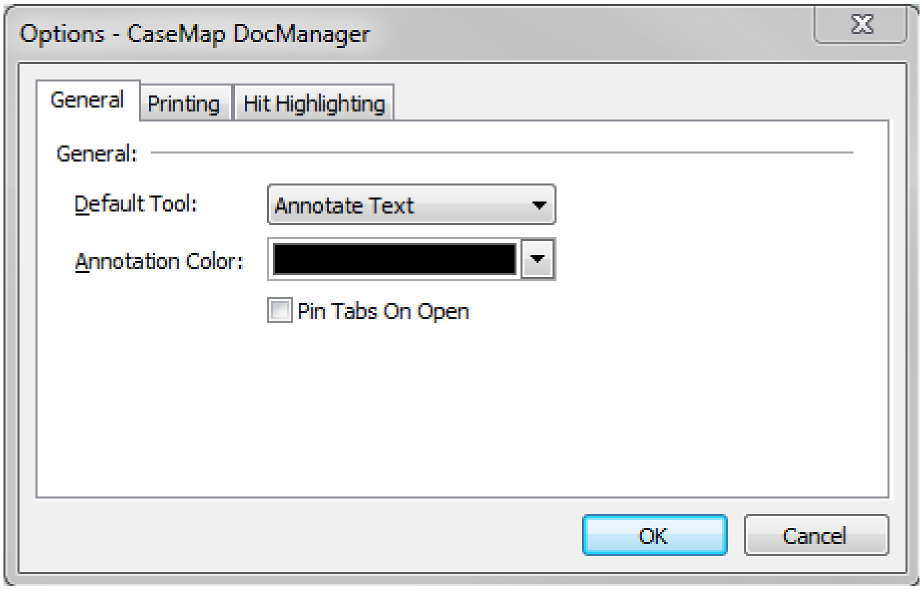
4. In the **DocManager**, click the **Home** ribbon, and then click **Select Redactions**.

5. Select and click on a redaction within the document.

   The selected redaction displays with the ability to adjust its width/height.

6. On the **Home** tab of the **DocManager**, click **Edit**, and then click **Options**.

   The Options - CaseMap DocManager dialog box opens.



Default Tool: Annotate Text

Annotation Color:

☐ Pin Tabs On Open

7. Optional: Click the **General** tab and make adjustments to the **Default Tool** and the **Animation Color** areas as applicable.

8. Optional: Click the **Printing** tab and make changes/updates as applicable.

9. Optional: Click the **Hit Highlighting** tab, and make changes as applicable.

10. Click **OK**.

Related Topics

About DocManager
Viewing documents and images
Creating a new redaction

Finding and redacting text
Deleting a redaction
Docking and undocking the DocManager
Changing DocManager options

## Deleting annotations

When a user creates an annotations in a replica case, the annotations need to be synchronized in the master case. When synchronization occurs, the replica case's annotated text displays in the Edit Annotation dialog box with the short name of the user who added the annotation or note. You must be in the Select Annotations mode to delete annotations.

### ⊟ To review deleting annotation considerations

Before deleting an annotation, please review the information in the following table.

| Deleting Annotation Considerations |
|---|
| If you delete an annotation that is linked to a fact or research authority/extract, the annotation will be deleted but the fact or authority/extract record remains on the respective spreadsheet and retains a link to the document. |
| When deleting a spreadsheet or case records, CaseMap will also delete all annotations associated with the records and spreadsheets. |
| If you delete an object, authority, or extract record that has annotated linked documents attached to it, the annotations will be deleted with the record. CaseMap will display a message when this occurs, displaying how many linked facts and annotations are attached to the record and will prompt you to confirm the deletion. |
| You cannot delete an annotation in a replica case if the same annotation already exists or was created in the master case. You can delete an annotation in a replica if it was created in the replica. |
| You can you delete an annotation in the master case, if it was created in the master and also exists in an outstanding replica. The replica annotation will not merge back into the master. |
| You can delete an annotation in the master case, if it was created in a replica and synchronized into the master case. |
| Annotations edits made in a replica are merged with the master whether or not edits already exist in the master case. |

### ⊟ To delete an annotation

1. From the **Annotation mode** list, click **Select Markups**.

   You can also click the Tools menu, click on the first menu item, and then click Select Markups.

2. Click on the annotation you want to delete.

3. Click the **Delete** button ✗ Delete on the toolbar.

4. In the message box, click **Yes** to delete the annotation.

   The highlighted text and its annotation are now permanently deleted from the document or image.

**Related Topics**

- About DocManager
- Annotating documents
- Creating new facts/extracts from annotations
- Docking and undocking the DocManager
- Printing annotations
- About replicating/synchronizing cases

## Deleting a redaction

CaseMap gives you the ability to create and to remove (delete) an individual redaction. When a redaction is removed/deleted, the original text is restored (restricted/hidden text removed) to the document.

### ⊟ To delete an individual redaction

1. In the **Case Shortcuts** pane, click **Documents** to navigate to the Documents spreadsheet.

2. In the **Documents** spreadsheet, select and click on the linked document (paperclip icon) to be opened/viewed.

> If CaseMap DocManager is not activated, you will be prompted activate it at the time you're attempting to view a document, or to obtain a trial copy. If you do not have a license, contact Support ((800) 543-6862).

   CaseMap DocManager opens displaying the selected linked file.

> If the 'Dock in Spreadsheet' option to view documents had been selected in the

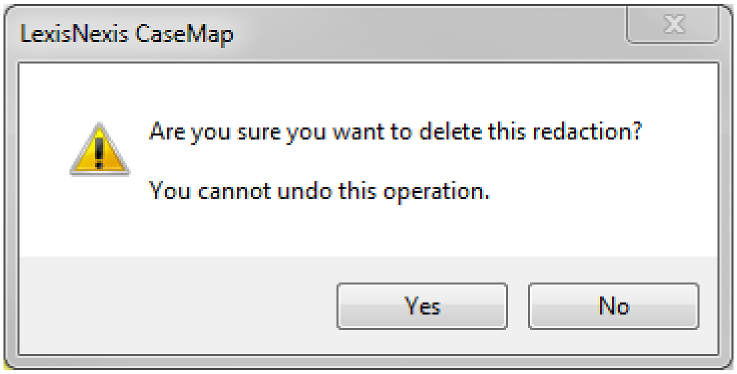
DocManager for a previous document viewing, then all subsequent document viewings will be done via the DocManager being docked within the CaseMap application. See Docking and undocking the DocManager for more information.

3. In the **DocManager**, click the **Home** ribbon, and then click **Select Redactions**.
4. In the document, select and click on a created redaction.

   The Delete button is enabled.

5. On the **Edit and Print** tab, click **Delete**.

   A confirmation dialog box displays.

   Are you sure you want to delete this redaction?

   You cannot undo this operation.

6. In the confirmation dialog box, click **Yes** to confirm the deletion/removal.

   The redaction is deleted and the hidden/restricted information is displayed as in the original document.

7. In the **DocManager**, click the **Home** ribbon, and then click **Close** to close the DocManager.

Related Topics

About DocManager
Viewing documents and images
Viewing a redaction reason
Finding and redacting text
Editing a redaction
Changing DocManager options
Docking and undocking the DocManager

## Printing annotations

When printing annotated documents or images from DocManager, you have the following options:

- Print to Printer
- Print to PDF
- Print to TIFF

You can choose whether to print annotations and notes in the printed output. The default setting is set to No. CaseMap will remember the setting you choose and default to it when you next print annotations. Annotations applied to images will print when printing a single document or batch printing (both before and after OCR processing).

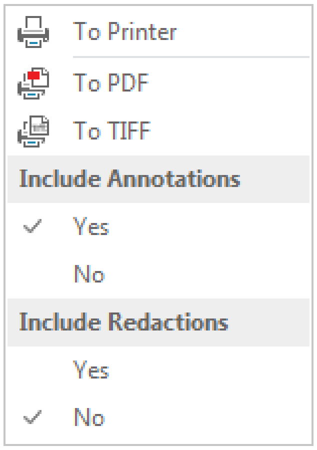
When you print annotations to PDF the default color setting is yellow, but you can select the color for which you want all annotations to print. When annotations are printed to PDF, the note displays in a pop-up window that also states Created by CaseMap when you place your mouse pointer over it. The note display feature occurs when you are batch printing, single printing, or exporting content. When you print to a TIFF, the annotation text prints highlighted but note text is not printed. When you print a hard copy, the annotation text prints shaded in gray but note text is not printed. For information on modifying print options, see Changing DocManager options.

### ⊟ To print annotations

1. In **DocManager**, on the **Home** Tab, click the **Print** button.

   If DocManager is docked as a pane in CaseMap, you will not have access to DocManager menus. Undock DocManager to regain menu access.

2. On the **Print** submenu, verify that the **Include Annotations** option is set to **[Yes]**.



   To print the document or image without annotations, click [No] on the Include Annotations submenu. The default setting is No.

3. Optional: On the **Print** submenu, verify that the **Include Redactions** option is set to

**[Yes]** to include redacted content. Otherwise, Click **No** and proceed to the next step.

4. On the **Print** submenu, click the print output option you want: **To Printer**, **To PDF**, or **To TIFF**.

   If you select To Print, in the Print dialog box select your print options and then click Print.

   If you select To PDF, in the Print to PDF dialog box select the file name and then click Save.

   If you select To TIFF, in the Print to TIFF dialog box select the file name and then click Save.

5. Click the X in the upper right corner to close the window.

Related Topics

About DocManager
Annotating documents
Creating new facts/extracts from annotations
Editing annotations
Deleting annotations
Changing DocManager options
Docking and undocking the DocManager

## Printing redactions

When printing documents from DocManager that contains redacted content, you have the following options:

- Print to Printer
- Print to PDF
- Print to TIFF

### ⊟ To print redactions

1. Ensure that the **CaseMap DocManager Print Options** have been set to include redactions when printing.

   Open a document in the DocManager.

   In DocManager, click Edit, and on the sub-menu, click Options.

   In the Options -CaseMap DocManager dialog box, click the Printing tab.

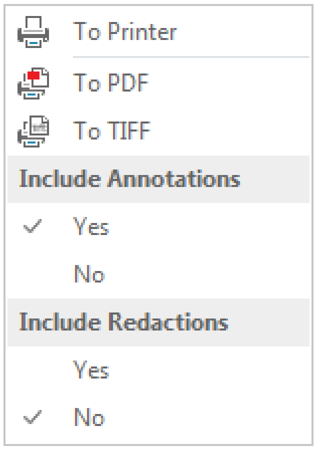
   Under the Redactions area of the screen, place a check mark in the 'Include redactions when printing'.

Click OK to continue.

2. In **DocManager**, on the **Home** Tab, click the **Print** button.

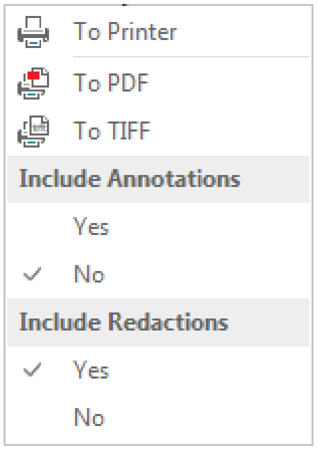
> If DocManager is docked as a pane in CaseMap, you will not have access to DocManager menus. Undock DocManager to regain menu access.

3. Optional: On the **Print** submenu, verify that the **Include Annotations** option is set to **[Yes]** to include annotated content.


To Printer
To PDF
To TIFF
Include Annotations
✓ Yes
No
Include Redactions
Yes
✓ No

To print the document or image without annotations, click [No] on the Include Annotations submenu and proceed to the next step.

4. On the **Print** submenu, verify that the **Include Redactions** option is set to **[Yes]**.


To Printer
To PDF
To TIFF
Include Annotations
Yes
✓ No
Include Redactions
✓ Yes
No

To print the document or image without redactions, click [No] on the Include Redactions submenu. The default setting is No.

5. On the **Print** submenu, click the print output option you want: **To Printer**, **To PDF**, or **To TIFF**.

If you select To Print, in the Print dialog box, select your print options and then click Print.

If you select To PDF, in the Print to PDF dialog box, select the file name and then click Save.

If you select To TIFF, in the Print to TIFF dialog box, select the file name and then click Save.

6. Click the x in the upper right corner to close the window.

## Batch printing linked documents

The Batch Printing Wizard allows you to print documents linked to an objects spreadsheet, research spreadsheets (Authorities and Extracts from Authorities spreadsheets), and the Facts spreadsheet. You must be viewing the spreadsheet from which you want to print documents before the batch printing options are enabled. You can only batch print from one spreadsheet at a time. You must have permission to save files to a selected folder when printing to PDF or TIFF.

***Batch printing options include:***

- Wizard to Printer
- Wizard to PDF
- Wizard to TIFF

***The Batch Print Wizard allows you to:***

- Review documents in the batch, and remove any you do not want to print
- Select color and annotation options
- Choose your printed output

⊟ **To review batch printing considerations**

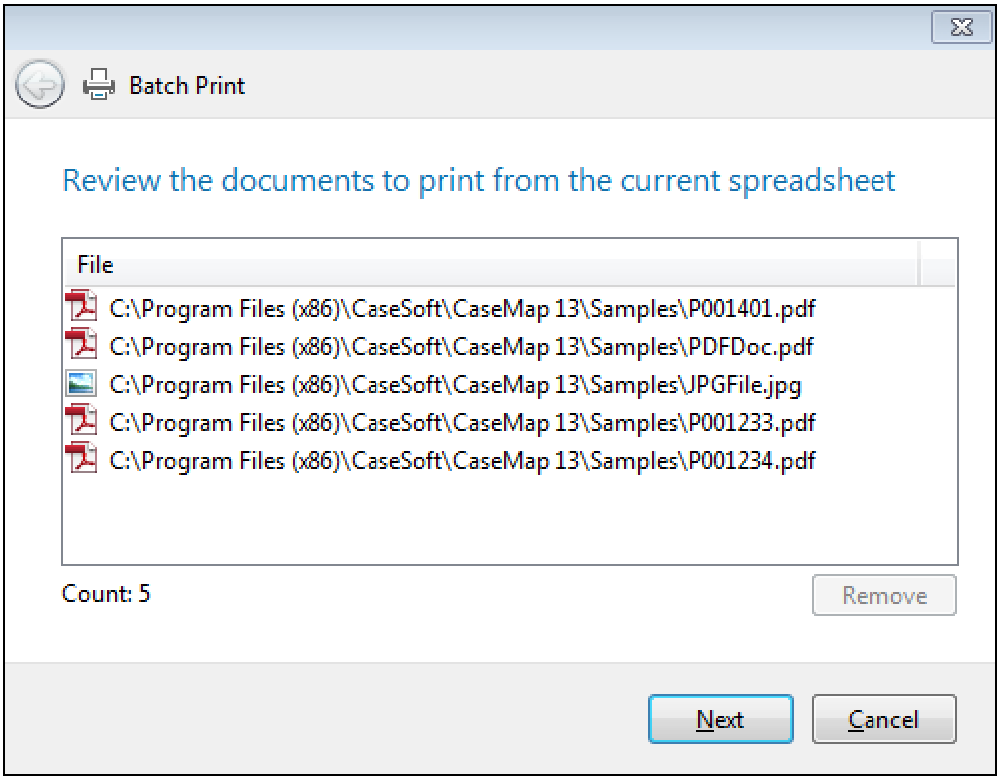
Review the Batch Printing Considerations table to learn more about using this feature.

| Batch Printing Considerations |
|---|
| **General** |
| When printing from the Facts spreadsheets, CaseMap loads all documents for any object linked to a fact record into the batch for printing. |
| When printing from an objects or research spreadsheet, CaseMap loads all documents in the Linked File field into the batch for printing. If an object is linked to multiple facts, the document is only selected once for printing. |
| If any filters or searches are currently running in a spreadsheet, CaseMap loads only those documents linked to records in the current spreadsheet view. |
| Files print in the order they display on the selected spreadsheet (as opposed to file name |

| Batch Printing Considerations |
|---|
| **General** |
| order). When printing from the Facts spreadsheet, files print in the order they first display. If a document is linked to a fact record multiple times, it will only be selected once for printing. If multiple documents are linked to a single fact, the documents will be listed in a random order in the Batch Print Wizard. |
| **Printer, PDF, or TIFF** |
| Burning annotations as a permanent part of the image prints the annotations in color into the Printer, PDF, or TIFF file. |
| Printing annotation notes in the Printer, 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 when the annotations were applied. The color selected for printing applies to all annotations in the document batch. For example, if users apply annotations using green and pink colors and yellow is selected as the annotation print color, then all annotations will print highlighted in yellow. |
| Case staff must have permission to save files to a selected folder when printing to Printer, PDF, or TIFF. If they do not have folder permissions, users should select another folder or contact their system administrator for assistance. |

### To batch print to a printer

1. On the **Reports** ribbon, select **Batch Print**.
2. On the submenu, click **To Printer**.
3. In the **Review the documents to print from the current spreadsheet** dialog box, review the documents you want to print from the current spreadsheet.


Batch Print
Review the documents to print from the current spreadsheet
File

C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001401.pdf
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\PDFDoc.pdf
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\JPGFile.jpg
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001233.pdf
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001234.pdf

Count: 5

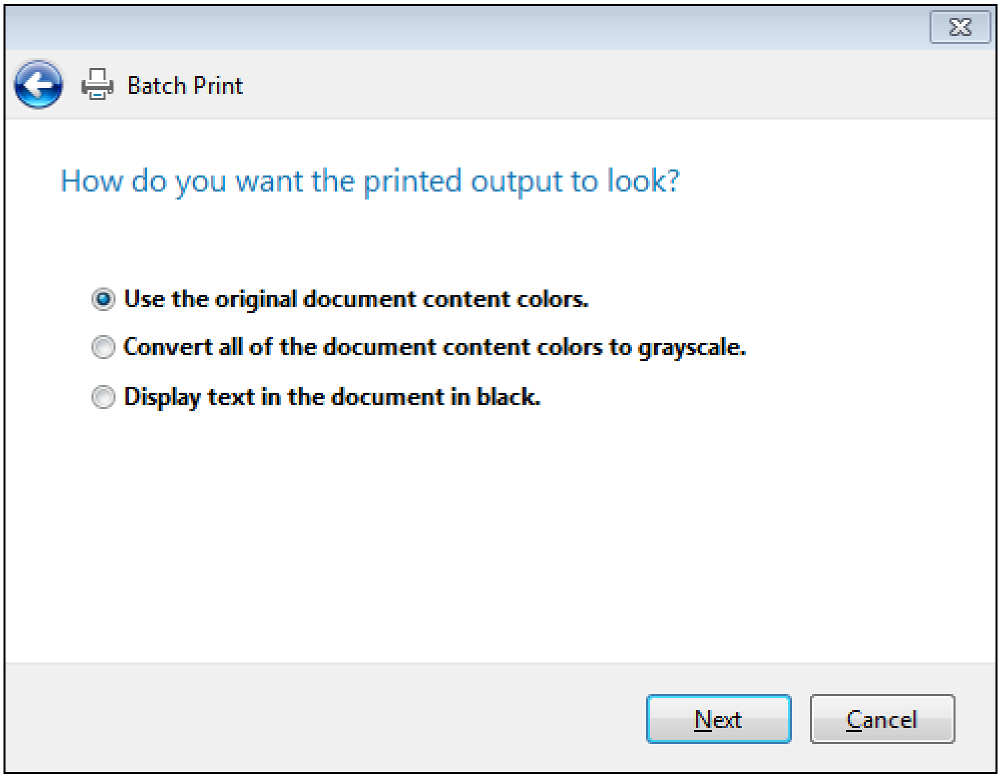
Remove
Next
Cancel

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

4. Click **Next** to continue.

5. In the **How do you want the printed output to look** dialog box, select a document content color option:

   - Use the original document content colors
   - Convert all of the document content colors to grayscale
   - Display text in the document in black



How do you want the printed output to look?

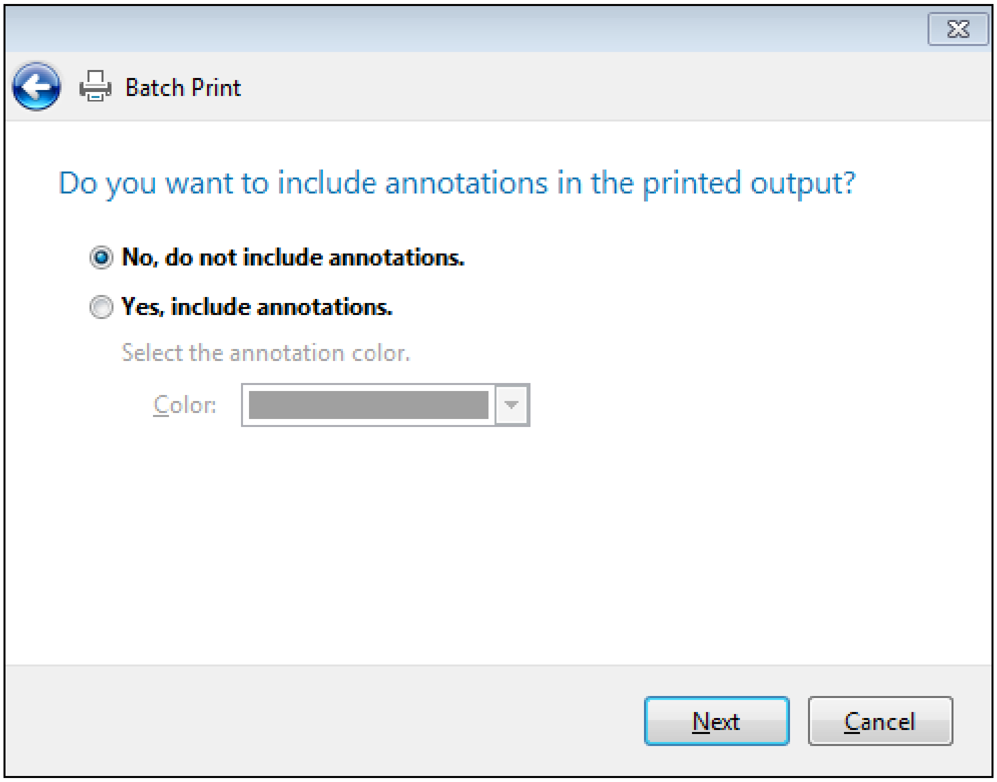
● Use the original document content colors.

○ Convert all of the document content colors to grayscale.

○ Display text in the document in black.

6. Click **Next** to continue.

7. In the **Do you want to include annotations in the printed output** dialog box, select whether you want to print annotations, and then click **Next** to continue.



Batch Print

Do you want to include annotations in the printed output?

● No, do not include annotations.

○ Yes, include annotations.

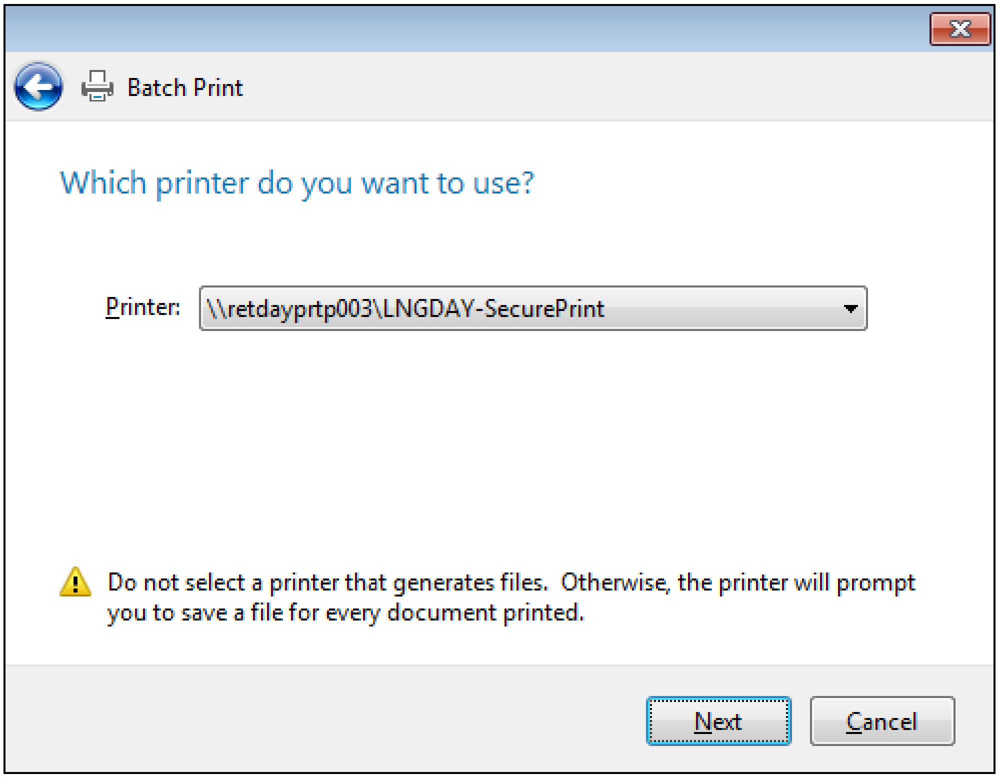
Select the annotation color.

Color:

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

8. Click **Next** to continue.

9. In the **Which printer do you want to use** dialog box, select the printer you want to use in the **Printer** list.

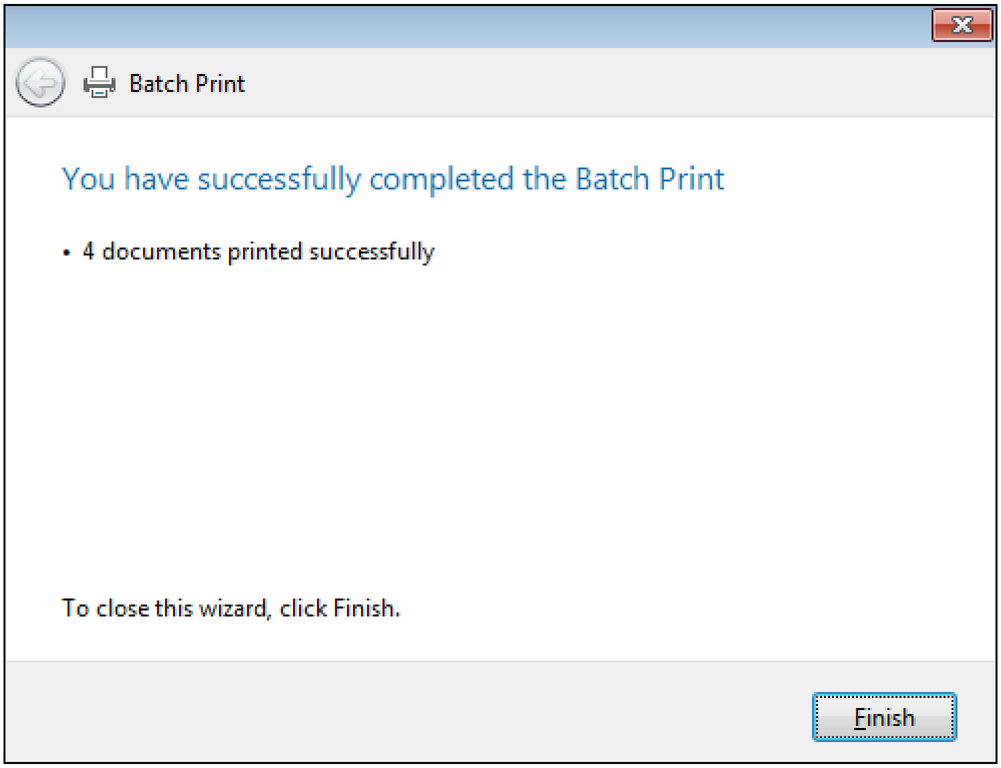

Batch Print
Which printer do you want to use?
Printer: \\retdayprtp003\LNGDAY-SecurePrint
Do not select a printer that generates files. Otherwise, the printer will prompt you to save a file for every document printed.
Next
Cancel

Do not select a printer that generates files. Otherwise, the printer will prompt you to save a file for every document printed.

10. Click **Next** to continue.
11. Review your selected options and click **Next**.

    Please wait while printing is completed.

12. Review the number of documents that printed successfully, and then click **Finish**.



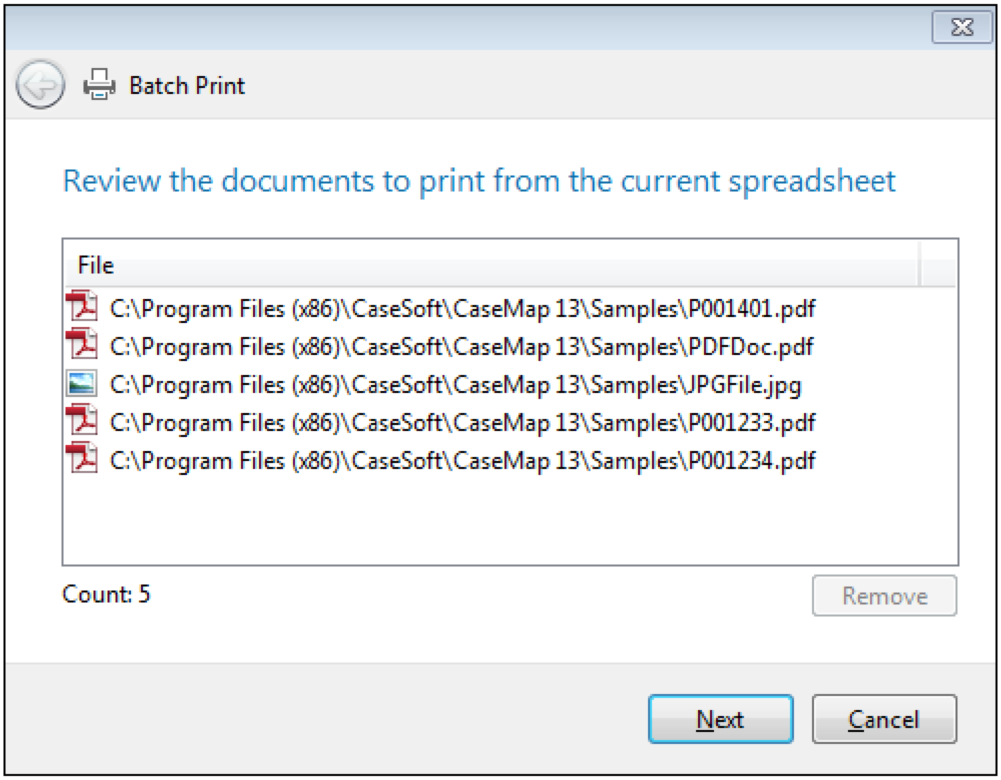
You have successfully completed the Batch Print

- 4 documents printed successfully

To close this wizard, click Finish.

### ⊟ To batch print to PDF

1. On the **Reports** menu, select **Batch Print**, and then click **To PDF**.
2. In the **Review Documents** dialog box, review the documents you want to print from the current spreadsheet.


Batch Print
Review the documents to print from the current spreadsheet
File
Remove
Next
Cancel

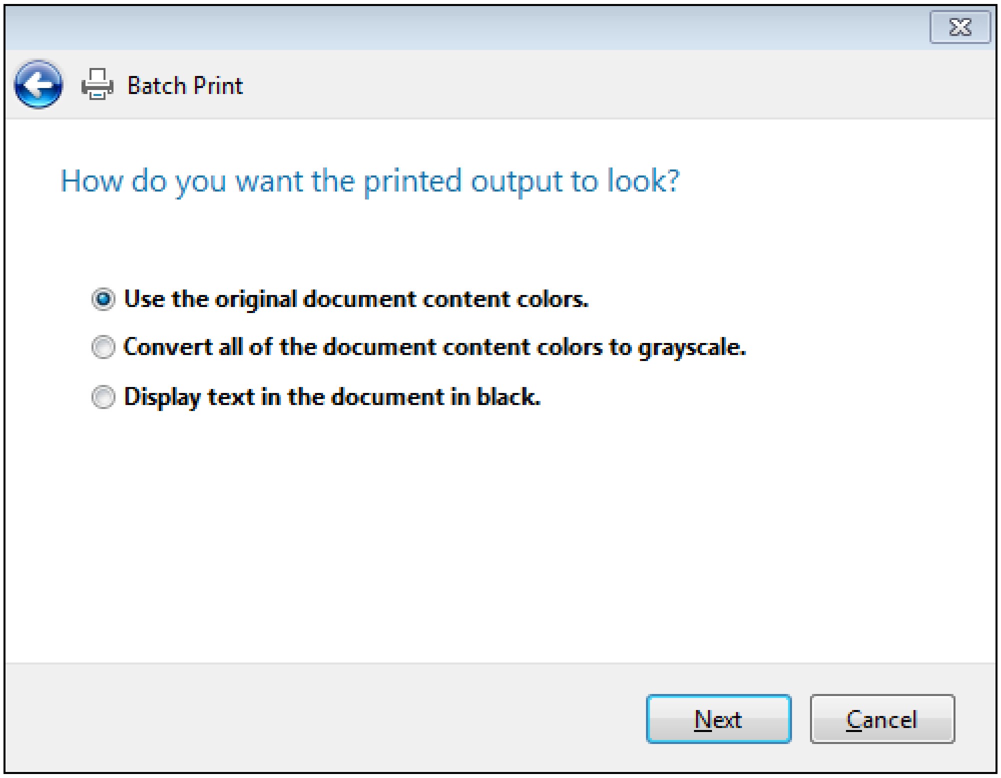
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001401.pdf
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\PDFDoc.pdf
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\JPGFile.jpg
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001233.pdf
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001234.pdf

Count: 5

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

3. Click **Next** to continue.

4. In the **Document Content Colors** dialog box, select a document content color option:
   - Use the original document content colors
   - Convert all of the document content colors to grayscale
   - Display text in the document in black

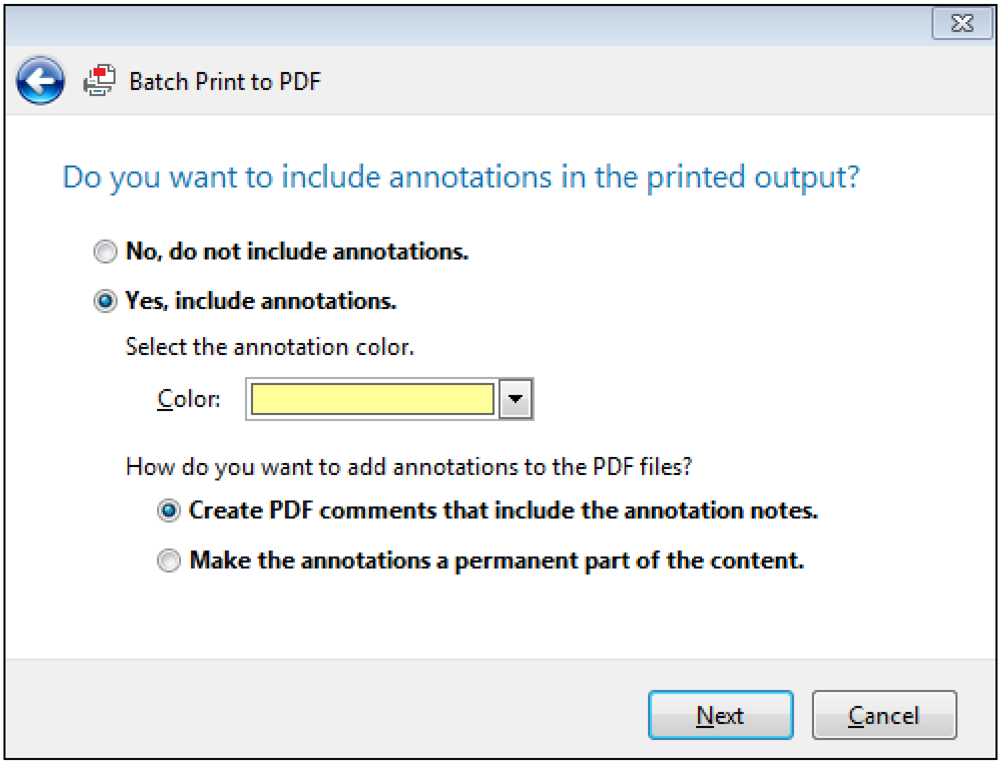


How do you want the printed output to look?

● Use the original document content colors.
○ Convert all of the document content colors to grayscale.
○ Display text in the document in black.

5. Click **Next** to continue.

6. In the **Do you want to include annotations in the printed output** dialog box, select whether you want to print annotations, and then click **Next** to continue.



Do you want to include annotations in the printed output?

○ No, do not include annotations.

● Yes, include annotations.

Select the annotation color.

Color: 🟨

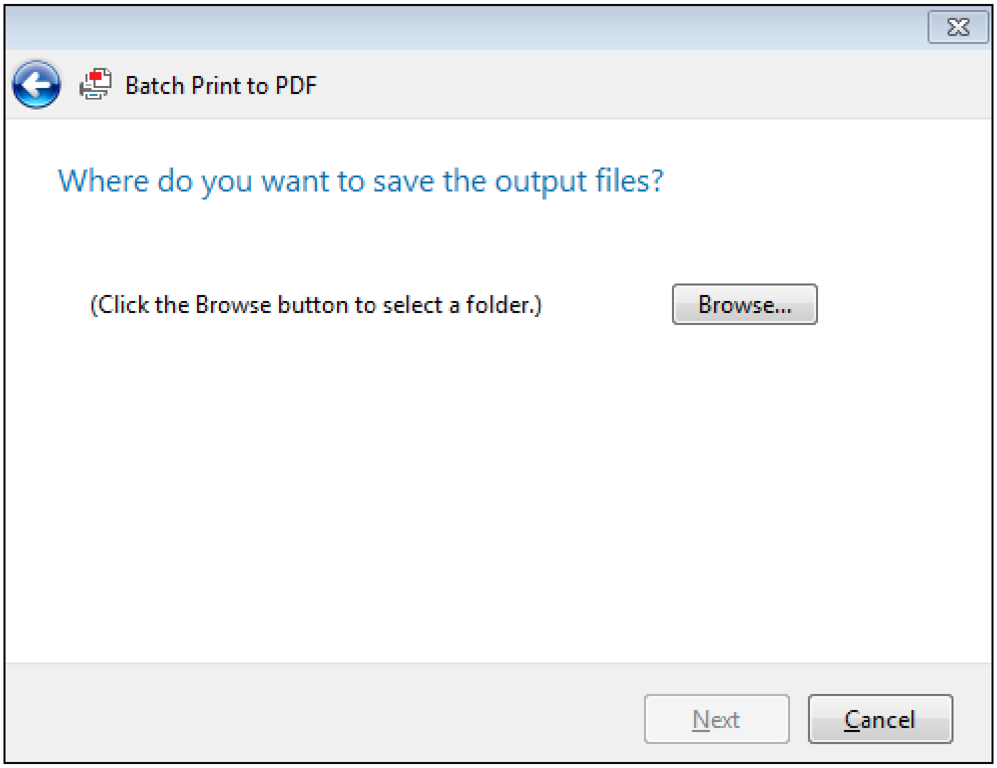
How do you want to add annotations to the PDF files?

● Create PDF comments that include the annotation notes.

○ Make the annotations a permanent part of the content.

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

7. Optional: Select how you want to add annotations to the PDF files:
   - Create PDF comments that include annotation notes
   - Make the annotations a permanent part of the content
8. Click **Next** to continue.
9. In the **Where do you want to save the output files** dialog box, click the **Browse** button to navigate to the network folder where you want the files saved, and then click **OK**.



Where do you want to save the output files?

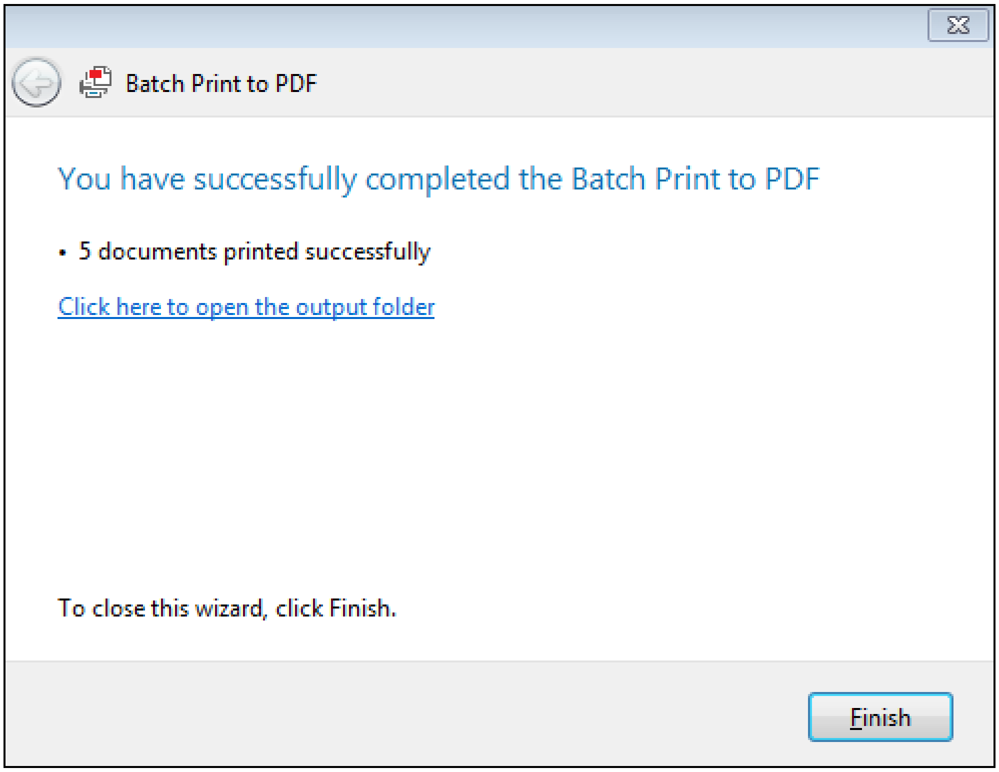
(Click the Browse button to select a folder.)

10. Click **Next** to continue.

11. In the **Review your selected options** dialog box, review your selected options, then click **Next**.

    Please wait while the printing is completed.

12. In the **Complete** box, review the number of documents that printed successfully.



You have successfully completed the Batch Print to PDF

- 5 documents printed successfully

Click here to open the output folder

To close this wizard, click Finish.

13. Optional: Click the link **Click here to open the output folder** to review the printed output.

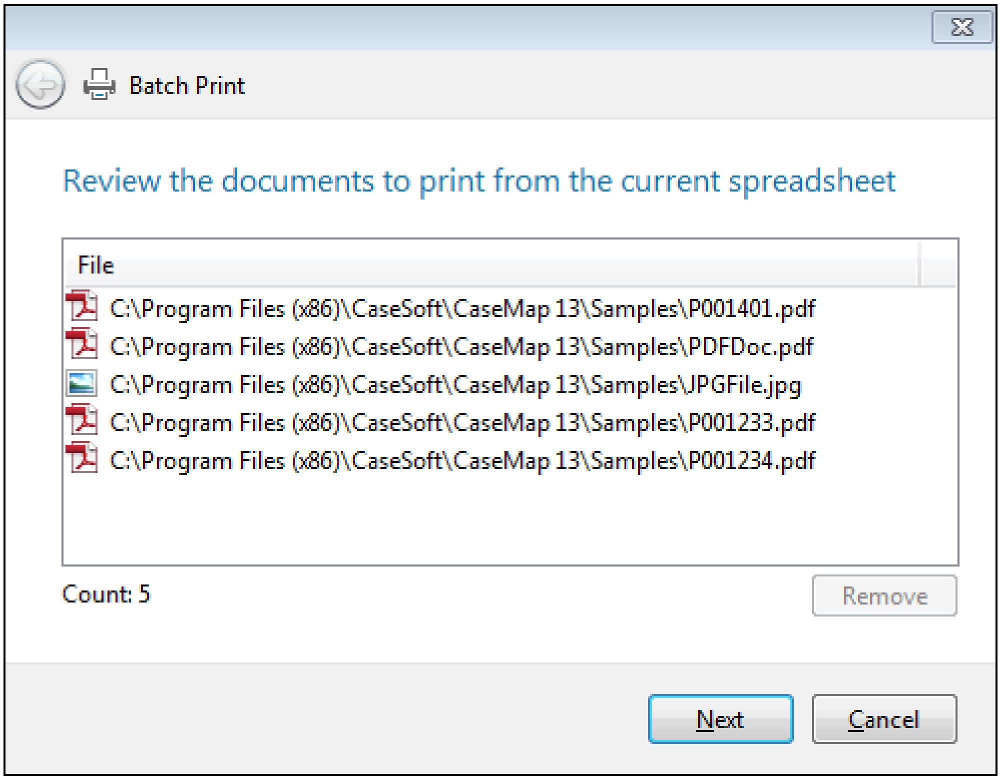
14. Click **Finish** to close the wizard.

**⊟ To batch print to TIFF**

1. On the **Reports** menu, select **Batch Print Wizard**.

2. On the submenu, click **To TIFF**.

3. In the **Review Documents** dialog box, review the documents you want to print from the current spreadsheet.



Review the documents to print from the current spreadsheet

| File |
|---|
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001401.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\PDFDoc.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\JPGFile.jpg |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001233.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001234.pdf |

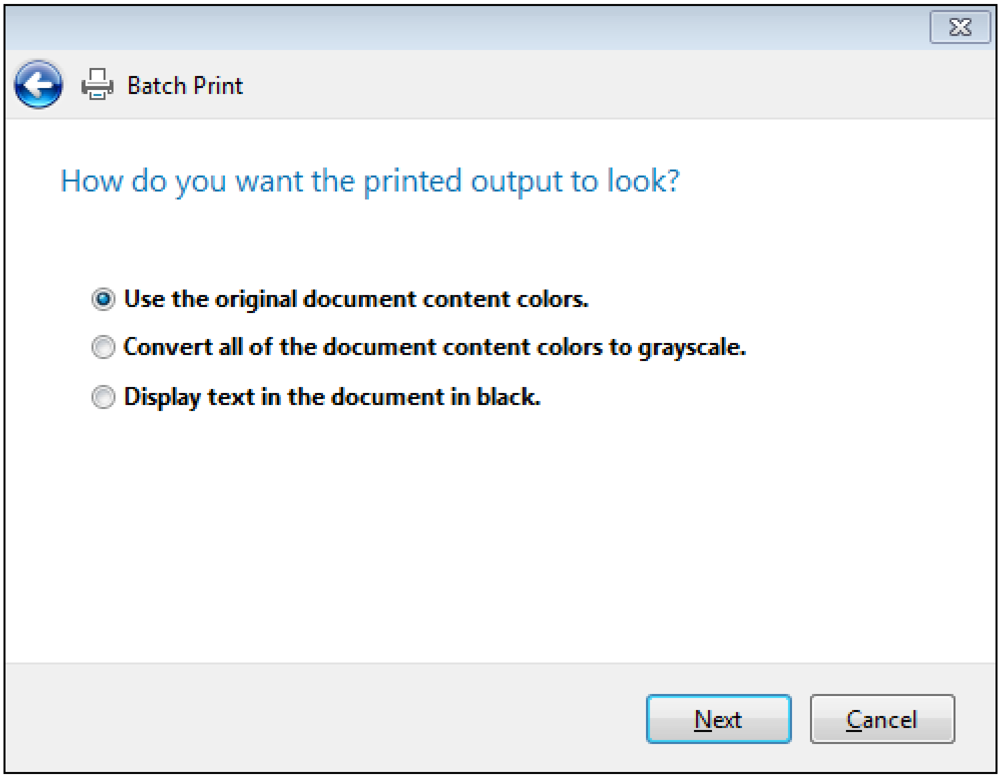
Count: 5

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

4. Click **Next** to continue.

5. In the **How do you want the printed output to look** dialog box, select a document content color option:

   - Use the original document content colors
   - Convert all of the document content colors to grayscale
   - Display text in the document in black



How do you want the printed output to look?

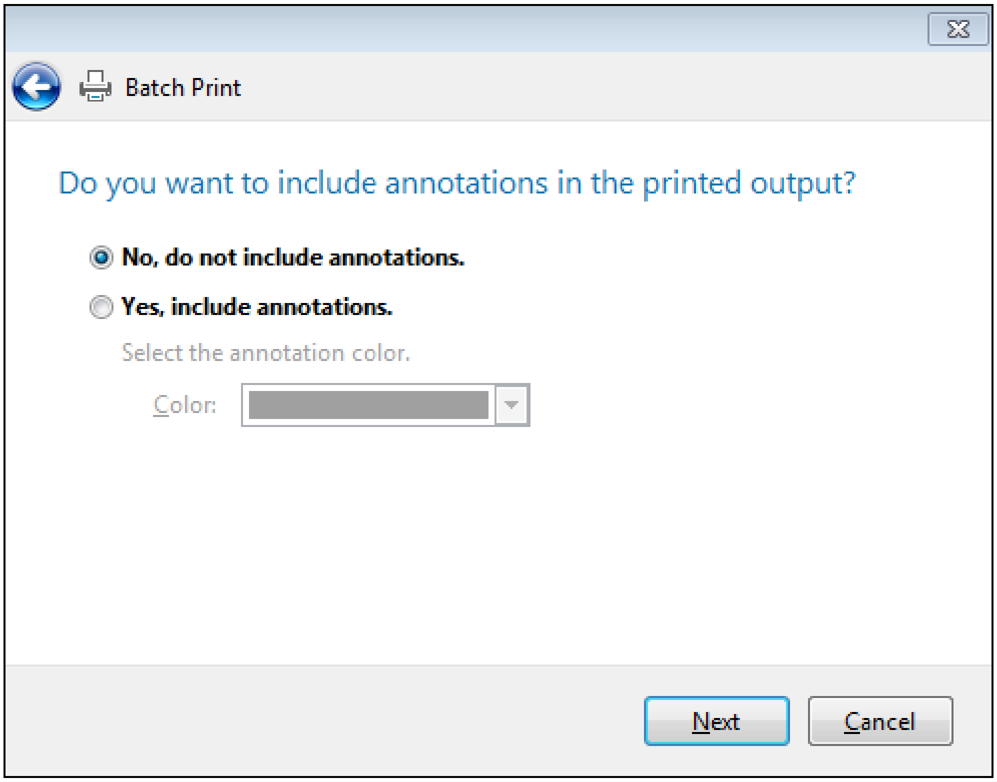
● Use the original document content colors.

○ Convert all of the document content colors to grayscale.

○ Display text in the document in black.

6. Click **Next** to continue.

7. In the **Do you want to include annotations in the printed output** dialog box, select whether you want to print annotations, and then click **Next** to continue..



Do you want to include annotations in the printed output?

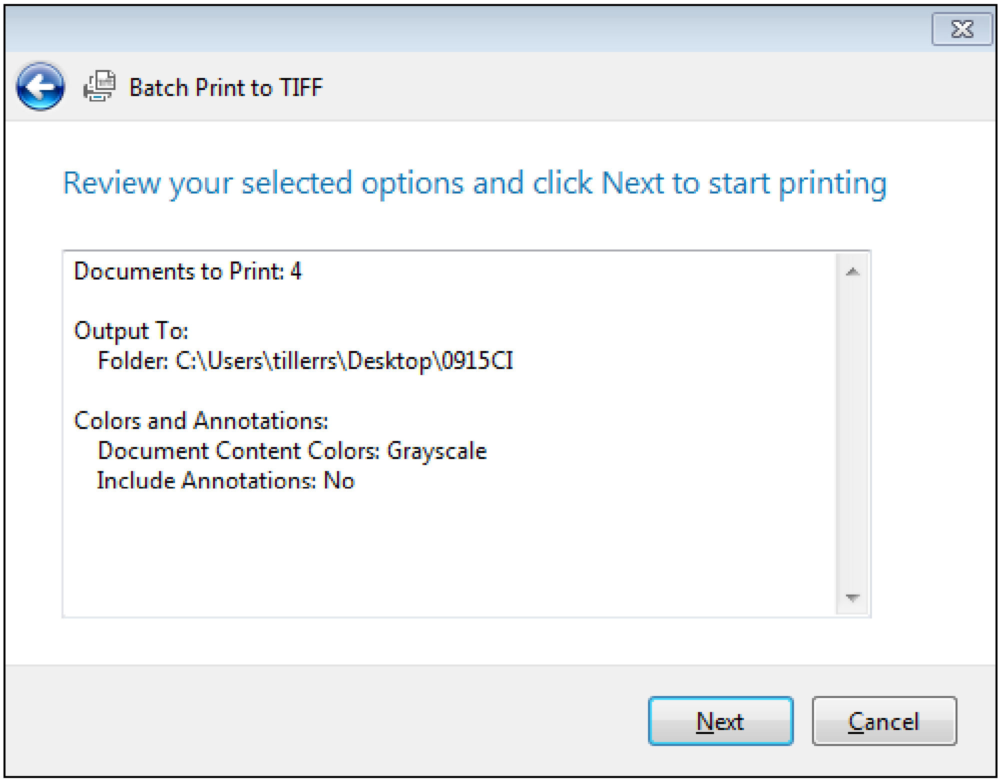
● No, do not include annotations.

○ Yes, include annotations.

Select the annotation color.

If Yes, click on the color for which you want annotations to print in the Color list, and then click **Next** to continue.

8. In the **Where do you want to save the output files** dialog box, click the **Browse** button to navigate to the network folder where you want the files saved, and click **OK**.



Review your selected options and click Next to start printing

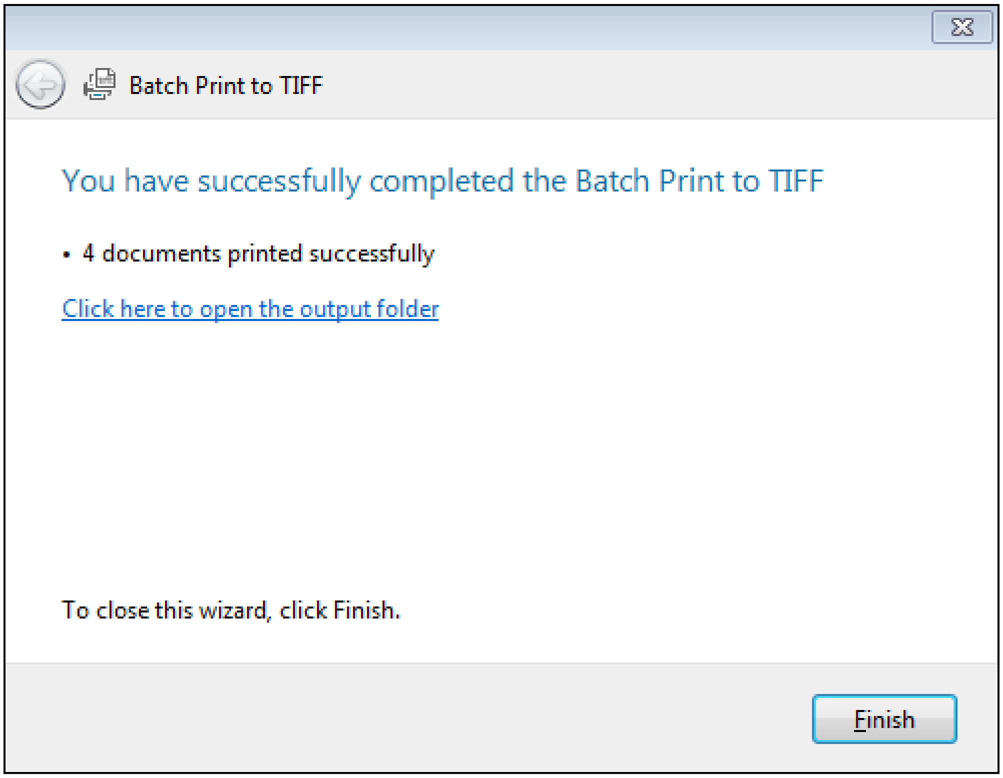
Documents to Print: 4

Output To:
Folder: C:\Users\tillerrs\Desktop\0915CI

Colors and Annotations:
Document Content Colors: Grayscale
Include Annotations: No

9. Click **Next** to continue.
10. In the **Review your selected options and click Next to start printing** dialog box, review your selected options, then click **Next**.

    Please wait while the printing is completed.
11. Review the number of documents that printed successfully.



You have successfully completed the Batch Print to TIFF

- 4 documents printed successfully

Click here to open the output folder

To close this wizard, click Finish.

12. Optional: Click the link **Click here to open the output folder** to review the printed output.

13. Click **Finish** to close the wizard.

Related Topics

About printing reports
Hiding documents when printing
Embedding linked documents in reports
Batch printing linked PDFs
Importing linked files
Docking and undocking the DocManager

## Docking and undocking the DocManager

You can open DocManager in a separate window from CaseMap.

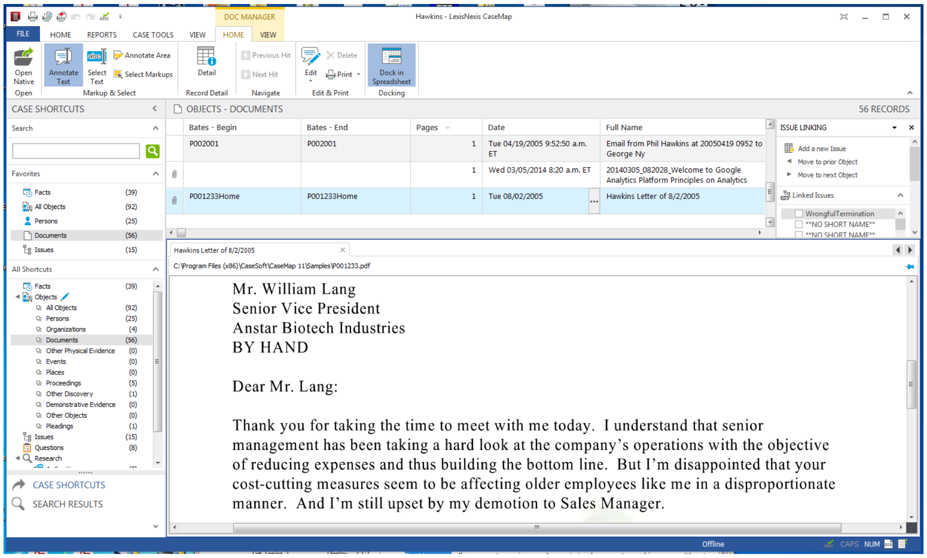
⊟ **To dock or undock DocManager**

1. Open a document in DocManager.
   In CaseMap, select the **Documents** spreadsheet and then click the paperclip icon for the record whose document you want to open. Select a document listed under the paperclip. DocManager opens.

> If CaseMap DocManager is not activated, you will be prompted activate it at the time you're attempting to view a document, or to obtain a trial copy. See [Document production processing]() for more information.

> If the Open Linked Files in DocManager option (File tab > Options > Spreadsheet) check box has been cleared, any document/image opened, is opened using its native application (e.g., Adobe Acrobat).

2. Click **Dock in Spreadsheet**.to undock or re-dock DocManager.


Hawkins - LexisNexis CaseMap
DOC MANAGER
FILE
HOME
REPORTS
CASE TOOLS
VIEW
HOME
VIEW
Open Native
Open
Annotate Text
Select Text
Annotate Area
Select Markups
Markup & Select
Detail
Record Detail
Previous Hit
Next Hit
Navigate
Edit
Delete
Print
Edit & Print
Dock in Spreadsheet
Docking
CASE SHORTCUTS
Search
Favorites
Facts (39)
All Objects (92)
Persons (25)
Documents (56)
Issues (15)
All Shortcuts
Facts (39)
Objects
All Objects (92)
Persons (25)
Organizations (4)
Documents (56)
Other Physical Evidence (0)
Events (0)
Places (0)
Proceedings (5)
Other Discovery (1)
Demonstrative Evidence (0)
Other Objects (0)
Pleadings (1)
Issues (15)
Questions (8)
Research
CASE SHORTCUTS
SEARCH RESULTS
OBJECTS - DOCUMENTS
56 RECORDS
ISSUE LINKING
Add a new Issue
Move to prior Object
Move to next Object
Linked Issues
WrongfulTermination
**NO SHORT NAME**
**NO SHORT NAME**
Hawkins Letter of 8/2/2005
C:\Program Files (x86)\CaseSoft\CaseMap 11\Samples\P001233.pdf
Offline
CAPS NUM

| Bates - Begin | Bates - End | Pages | Date | Full Name |
|---|---|---|---|---|
| P002001 | P002001 | 1 | Tue 04/19/2005 9:52:50 a.m. ET | Email from Phil Hawkins at 20050419 0952 to George Ny |
|  |  | 1 | Wed 03/05/2014 8:20 a.m. ET | 20140305_082028_Welcome to Google Analytics Platform Principles on Analytics |
| P001233Home | P001233Home | 1 | Tue 08/02/2005 | Hawkins Letter of 8/2/2005 |

Mr. William Lang
Senior Vice President
Anstar Biotech Industries
BY HAND

Dear Mr. Lang:

Thank you for taking the time to meet with me today. I understand that senior management has been taking a hard look at the company's operations with the objective of reducing expenses and thus building the bottom line. But I'm disappointed that your cost-cutting measures seem to be affecting older employees like me in a disproportionate manner. And I'm still upset by my demotion to Sales Manager.

**Related Topics**

[Viewing documents and images]()
[Document review and coding]()
[Creating new facts/extracts from annotations]()
[Annotating documents]()
[Editing annotations]()
[Deleting annotations]()
[Printing annotations]()

## Changing DocManager options

DocManager allows you to modify many options to enhance your linked file review preference.

***You can configure these DocManager options:***

- Open linked documents in DocManager or native applications
- Default annotation tool (Text annotation is the default)
- Pin or unpin documents opened in DocManager (default is unpinned)
- Change the annotation color to your personal viewing preference
- Search hit highlight color (defaults to blue)
- Printed annotation color (default is yellow)
- Include or exclude annotation comments when printing to PDF (default is exclude)
- Burn annotations in the printed output and/or hide annotation notes

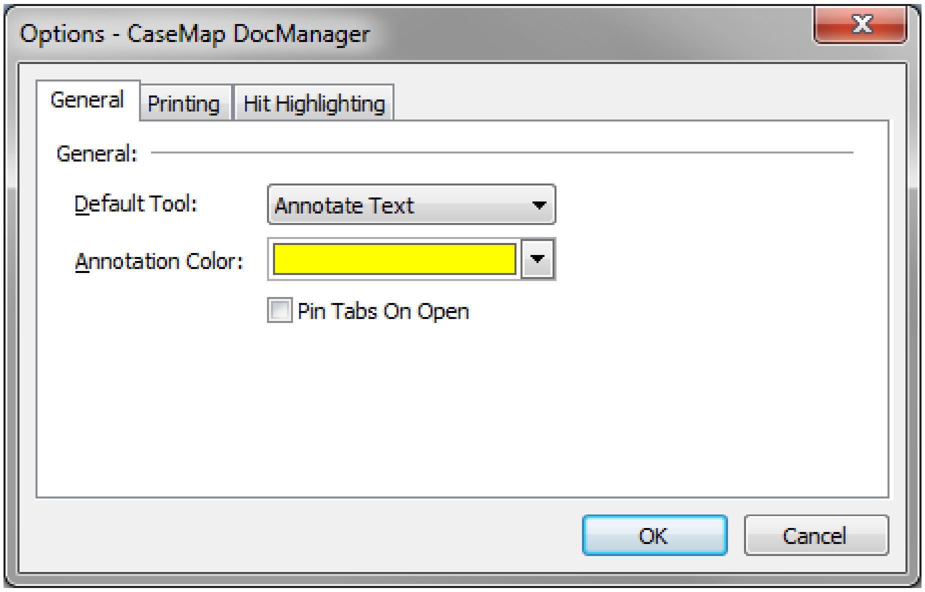
### ⊟ To configure whether DocManager or native applications open linked documents

1. In **CaseMap**, on the **File** tab, click **Options**, and then click **Spreadsheet**.
2. Do either of the following:
    - To have linked documents open in DocManager, select the **Open Linked Files in DocManager** check box.
    - To have linked documents open in their native applications (e.g., Acrobat, Word, etc.), clear the check box.

### ⊟ To change the pin setting

1. Open a linked file in DocManager.
2. On the **Home** ribbon, click **Edit** and then select **Options**.

    You can also click the Options icon ↘ in the lower right corner of the View ribbon.


Options - CaseMap DocManager
General
Printing
Hit Highlighting
OK
Cancel

General:

Default Tool: Annotate Text

Annotation Color: 🟨

☐ Pin Tabs On Open

3. On the **General** tab, clear or select the **Pin Tabs On Open** check box, depending on your preference.

   The default setting is for the document tabs to be unpinned.

   You can also click the View ribbon and then select the Pin Tabs on Open check box.

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

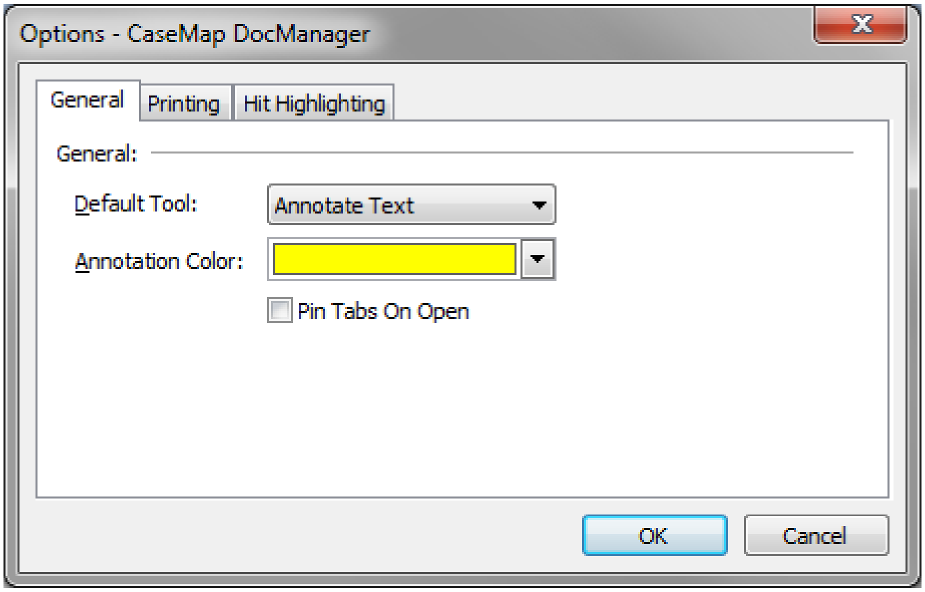
### ⊟ To change annotation default options

1. Open a linked file in DocManager.

2. On the **Home** ribbon, click **Edit** and then select **Options.**

   You can also click the Options icon ↘ in the lower right corner of the View ribbon.

3. In the Options dialog box, click the **General** tab.



Default Tool: Annotate Text

Annotation Color: 🟨

☐ Pin Tabs On Open

4. In the **Default Tool** list, click the setting you want to use each time DocManager launches: **Select Text**, **Select Annotations**, **Annotate Text**, or **Annotate Area**.
5. In the **Annotation Color** list, click on the color you want to use for your annotations.

   The annotation default color is yellow. The annotation color you select here is for your user view. Other case users may opt to use a different annotation color.

6. Clear or select the **Pin Tabs On Open** check box, depending on your preference.

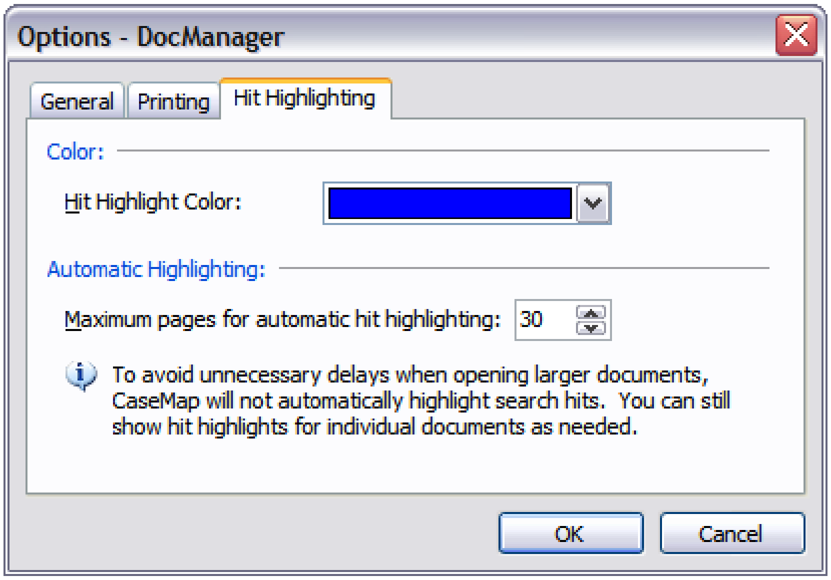
   The default setting is for the document tabs to be unpinned.

   You can also click the View ribbon and then click Pin Tab.

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

### ⊟ To change hit highlighting options

1. Open a linked file in DocManager.
2. On the **View** ribbon, click the **Options** icon .
3. In the Options dialog box, click the **Hit Highlighting** tab.


Options - DocManager
General
Printing
Hit Highlighting
Color:
Automatic Highlighting:
OK
Cancel

Hit Highlight Color:

Maximum pages for automatic hit highlighting: 30

To avoid unnecessary delays when opening larger documents, CaseMap will not automatically highlight search hits. You can still show hit highlights for individual documents as needed.

4. In the **Hit Highlight Color** list, click the color you want to use for search hits.

   The hit highlight default color is blue.

5. In the **Maximum pages for automatic hit highlighting** field, type in the maximum number of pages in a document before CaseMap will no longer display highlighted search hits.

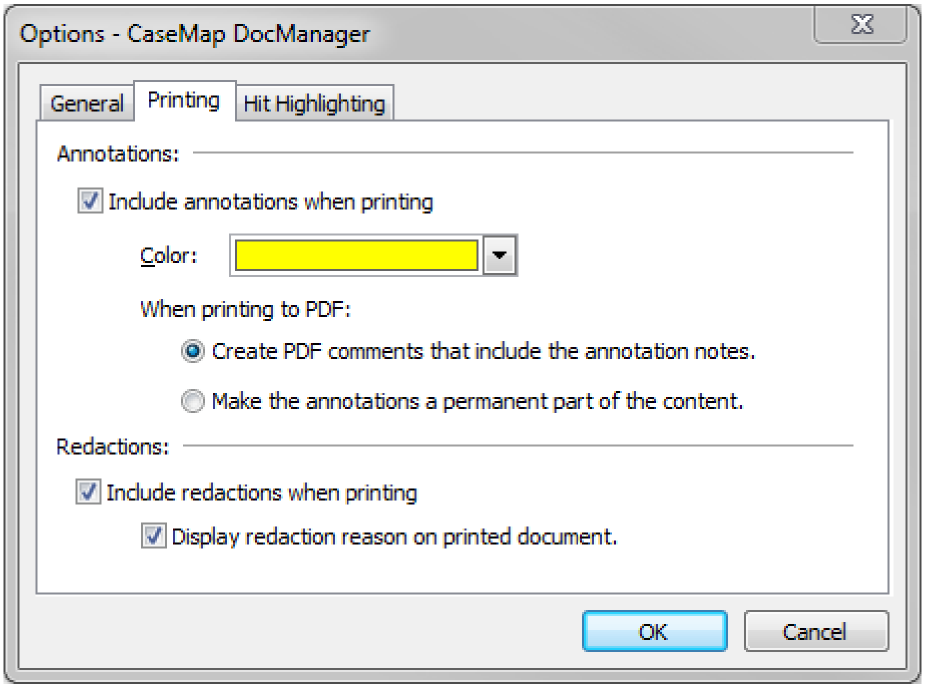
   The setting defaults to 30 pages.

   Use this feature to avoid unnecessary delays when viewing large documents in DocManager.

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

### ⊟ To change print options

1. Open a linked file in DocManager.
2. On the **Home** ribbon, click **Edit** and then select **Options**.
3. In the **Options** dialog box, click the **Printing** tab.



Annotations:

☑ Include annotations when printing

Color: 🟨

When printing to PDF:

● Create PDF comments that include the annotation notes.

○ Make the annotations a permanent part of the content.

Redactions:

☑ Include redactions when printing

☑ Display redaction reason on printed document.

4. Clear or select the **Include annotations when printing** check box, depending on your preference.

   The default setting is to not include annotations when printing (cleared).

5. In the **Color** list, select the color for which you want all annotations to print.

   The default print color is yellow.

   This settings does not affect the annotation color applied in the document. It is the setting color for printing annotations.

6. In the **When printing to PDF** area, select the option you want for printing:

   - Create PDF comments that include the annotation notes

     This option display notes in the printed output when the mouse pointer is placed over the annotation.

   - Make the annotations a permanent part of the content

     This option burns the annotation on the printed output, but notes do not display.

7. In the Redactions area, select the option(s) you want for printing:

   - Include reactions when printing

     This option includes documents with redacted content when printing.

   - Display redaction reason on printed document

     This option includes the redaction reason on the document when it's printed.

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

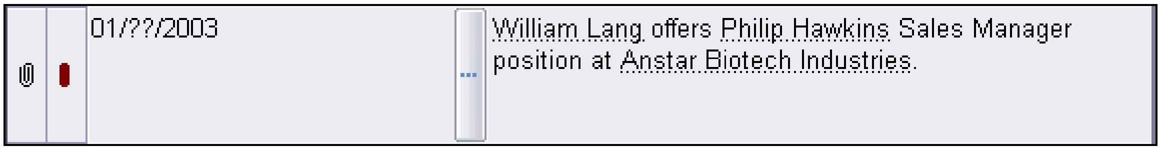
Related Topics

- [Viewing documents and images]
- [Annotating documents]
- [Editing annotations]
- [Deleting annotations]
- [Printing annotations]
- [Docking and undocking the DocManager]

# *Tagging Data*

## About tagging

Tagging data is essentially marking records in a spreadsheet that meet your filter criteria. You are still filtering data, but instead of filtering records to display only those that meet the your filter criteria, you are also marking them while they display with all other spreadsheet records.



01/??/2003

William Lang offers Philip Hawkins Sales Manager position at Anstar Biotech Industries.

For instance, you could tag data on the Facts spreadsheet to mark only facts entered in the past month. All facts would remain in the spreadsheet, but recently entered facts would be easy to spot because of the red tag to the left of the record.

Tags are distinct to your personal view and cannot be seen by other users of the case. Tags remain active until you cancel them or close the case.

### ⊟ Clear tags before printing reports

Tagged records print with the red icon in reports. If you want to remove the tag before printing reports, remember to click the Cancel Tag button in the Advanced Search pane beforehand.

Related Topics

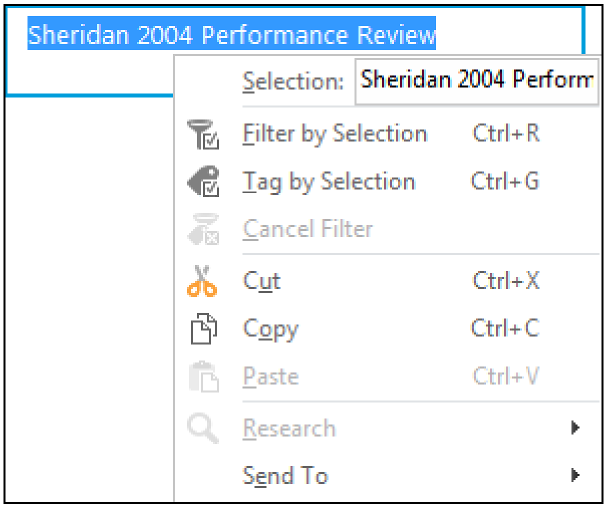
- [Tagging case records]

## Tagging case records

There are two methods you can use to tag records. You can quickly tag records simply by right-clicking on the spreadsheet field you want to search. You can also tag records by combined with a search operator to include or limit the search parameters.

### ⊟ To tag case records from spreadsheet fields

1. In the **Case Shortcuts** pane, click the spreadsheet icon in which you want to tag records.
2. Right-click in the cell of a field you want to search.
3. In the shortcut menu, type in the text you want to locate in the **Selection** field.


Sheridan 2004 Performance Review

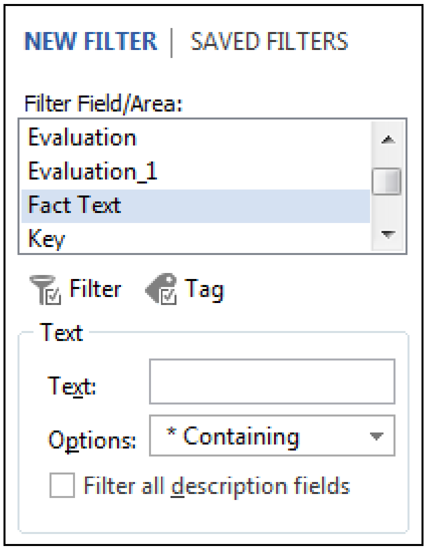
Selection: Sheridan 2004 Perform

4. Click **Tag by Selection**.

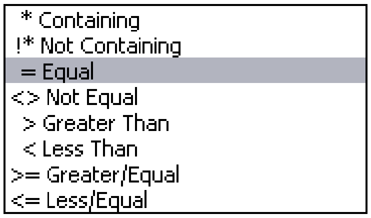
   Notice that all records in the Facts spreadsheet that meet your search criteria now have a red icon next to them and that the tag search displays in the top of the Advanced Search pane to note the active tag.

### ⊟ To tag case records using search operators

1. In the **Case Shortcuts** pane, click the spreadsheet icon in which you want to tag records.
2. On the **Home** menu, click **Sort & Filter**, and then on the submenu, click **Advanced Filter**.
3. In the **New Filter** pane, click on the field you want to search in the **Filter Field/Area** list box.


NEW FILTER
SAVED FILTERS
Filter Field/Area:
Evaluation
Evaluation_1
Fact Text
Key
Filter
Tag
Text
Text:
Options:
* Containing
Filter all description fields

4. In the **Text Search** area, type in the text you want to locate in the **Text** field.
5. In the **Options** drop-down listing, click the search delimiter in the **Options** field.


* Containing
!* Not Containing
= Equal
<> Not Equal
> Greater Than
< Less Than
>= Greater/Equal
<= Less/Equal

6. Click the **Tag** button to apply tags to the case records that match your search criteria.

   Notice that all records in the Facts spreadsheet that meet your search criteria now have a red icon next to them and that the tag search displays in the top of the Advanced Search pane to note the active tag.

### ⊟ To clear tags from case records

In the **Case Shortcuts** pane, click the spreadsheet icon in which you want to tag records.

1. Right-click and click **Cancel Filter** on the shortcut menu.
2. On the **Home** menu, click **Sort & Filter**, and then on the submenu, click **Advanced Filter** to display the pane.
3. Click the **Cancel Tag** button in the top pane of the Advanced Filter pane.

Related Topics

About tagging

# *Editing Data*

## About editing data

When editing or modifying data in a spreadsheet cell, you want to be careful that you do not break links set between case elements. Once data is modified and you exit a cell, it is saved and permanently changed in the case record.

***Editing field data involves:***

- Spell checking field text
- Finding/replacing data
- Copying/pasting data and records
- Inserting and deleting data and records
- Performing global edits/updates
- Changing linked file paths

Typing data into a cell that already contains text does not overwrite previous text. New data entered will start after the last period. If two people try to type in the same cell simultaneously, an error message displays indicating the conflict.

Related Topics

Using spelling tools
Finding/replacing data
Copying/pasting data and records
Inserting/deleting data and records
Making global replacements
Changing accessibility options

## Using spelling tools

CaseMap includes more than one spelling feature to ensure that spreadsheet field text is correct, or corrected for you, as you type.

***Spelling tools include:***

- **Spelling** — A spell-check tool that verifies the correct spelling of a word in a text and description fields (except object short names).
- **Live Spell Checking** — A spelling feature that automatically underlines text (red, wavy line)

that is not recognized by one of the CaseMap dictionaries. Right-click on one of these words to display a pop-up window with suggestions of possible corrections.

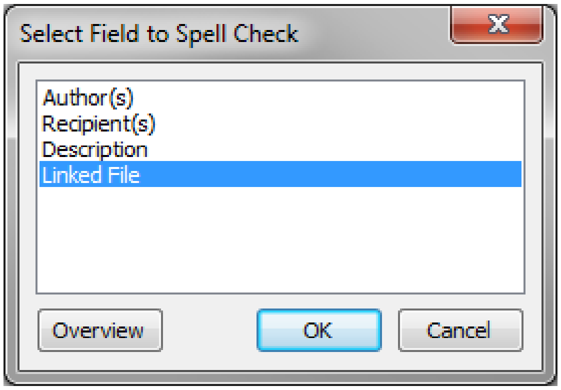
- **Autocorrect and Dual Initial Cap** — A spelling feature that recognizes when two capital letters are used consecutively or when common words are accidently misspelled. If you accidently type "teh", the Autocorrect tool automatically changes the text to "the". If you accidently type "THe", the Dual Initial Cap tool automatically shifts to second capital letter to lowercase.
- **Dictionary** — A standard English dictionary that also includes legal and medical term dictionaries. The legal dictionary is on be default, the medical dictionary is not. You can turn the medical dictionary on and make other changes to spelling and autocorrect settings by selecting Spelling and Autocorrect Options on the Tools menu.

The red, wavy lines that appear below unrecognized terms (e.g. abcdefghijklm) only display while you are working in a note. Once you leave a note, the red, wavy lines do not display even if the term remains unrecognizable.

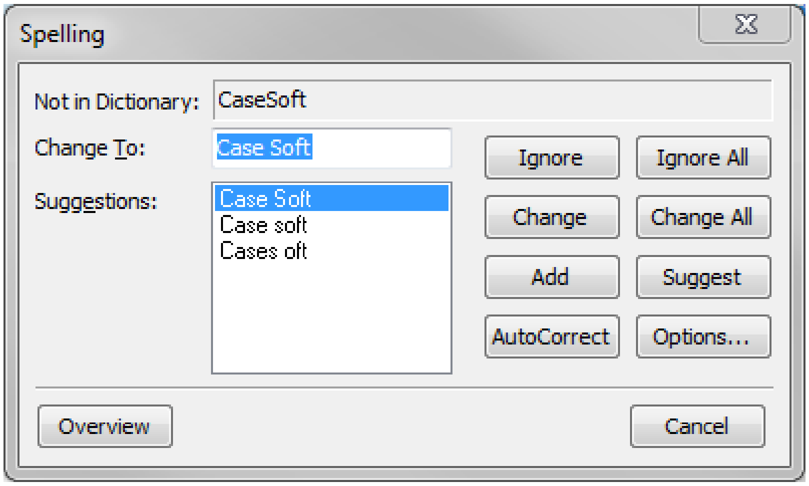
### To spell check text in a field

1. In the **Case Shortcuts** pane, click the icon for the spreadsheet you want to use.
2. On the **Quick Access Toolbar** menu, click **Spelling**.

   The Spelling icon is added to the Quick Access toolbar.
3. On the **Quick Access Toolbar**, click the **Spelling** icon to open the Select Field to Spell Check dialog box.
4. In the **Select Field to Spell Check** dialog box, select the field you want to spell check, then click **OK**.

   You can only spell check one spreadsheet field at a time, and only for text or description fields.
5. In the **Spelling** dialog box, review the selected word in the **Not in Dictionary** field.



Not in Dictionary: CaseSoft
Change To: Case Soft
Suggestions:
Case Soft
Case soft
Cases oft

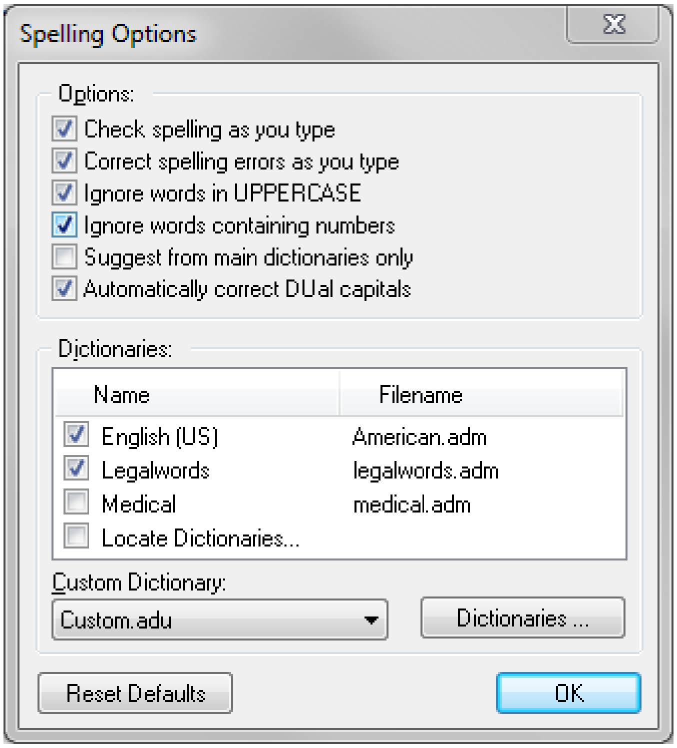
Notice that CaseMap highlights the word in the case record.

The Spell Checker ignores all short names (linked objects) in the field.

6. Select from the following spelling options:
   - In the Change To field, type the new spelling you want.
   - In the Suggestions field, select a new spelling from the list provided.
   - Click the appropriate button to the right to ignore, change, add, autocorrect, etc., the word.
7. In the message box notifying you that all records have been checked, click **Yes**.
8. Click **OK** to return to your spreadsheet.

### To adjust spelling options

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click the **Spelling and AutoCorrect** button.
3. In the **Spelling Options** dialog box, click the check box under **Options** for each feature you want turned on.



Options:
- ☑ Check spelling as you type
- ☑ Correct spelling errors as you type
- ☑ Ignore words in UPPERCASE
- ☑ Ignore words containing numbers
- ☐ Suggest from main dictionaries only
- ☑ Automatically correct DUal capitals

Dictionaries:

| Name | Filename |
|---|---|
| ☑ English (US) | American.adm |
| ☑ Legalwords | legalwords.adm |
| ☐ Medical | medical.adm |
| ☐ Locate Dictionaries... | |

Custom Dictionary: Custom.adu

4. In the **Dictionaries** box, select the check box for each dictionary you want turned on.

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

6. Optional: Click the **Reset Defaults** button to reactivate spelling default settings.

### To add a new dictionary

CaseMap is automatically configured to use a dictionary as well as a legal dictionary. You can also add additional dictionaries, like a medical dictionary, as needed.

1. On the **File** menu, click **Options**.

2. In the **Options** dialog box, click the **Spelling and AutoCorrect** button, and then click the **Dictionaries** button.

3. In the **Dictionaries** box, select the check box for dictionaries you want turned on.

   Select Locate Dictionaries to add a dictionary that is saved to your desktop or in a network folder.

4. Click the **Dictionaries** button to add a custom dictionary that is stored on your desktop or in a network folder.

5. Click **OK** to save the dictionary in CaseMap.

To add new or updated dictionaries, visit www.addictivesoftware.com.

Related Topics

About editing data
Finding/replacing data
Copying/pasting data and records
Inserting/deleting data and records
Making global replacements

## Finding and replacing data

When you need to locate records containing a specific word or phrase, use the Find feature to search case content. You can also replace text if you need to change the spelling of a word in your case.

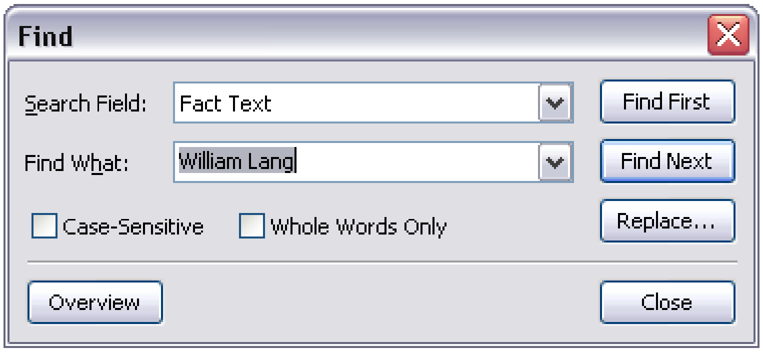
You also have the option to search for text that is case sensitive or is a particular groups of words. Selecting case sensitive provides matches of the text when certain characters are capitalized. Selecting the Whole Words Only option allows you to search for a particular word or phrase. For example, if you want to find every occurrence of the whole word "John" in a field, CaseMap locates all instances of both "John" and "Johnson".

When searching for data using the Find feature, you are limited to searching one field at a time. If you need to replace data, you can only do so in fields listed in the Search Field listing. You cannot replace data in the following fields: read-only, fixed lists, open-ended lists, evaluation fields, and check boxes.

CaseMap retains the text which you have used in the Find and Replace dialog boxes during for one user session, regardless of the field or spreadsheet being used. You can still make new selections and complete the find/replace process. When you close CaseMap and reopen it, these dialog boxes will be empty.

### ⊟ To find/replace data in a field

1. In the **Case Shortcuts** pane, click on the icon for the spreadsheet you want to use.
2. On the **Home** tab, click **Find** on the **Editing** menu.
3. In the **Find** box, click on the field you want to search in the **Search Field**.



Search Field: Fact Text

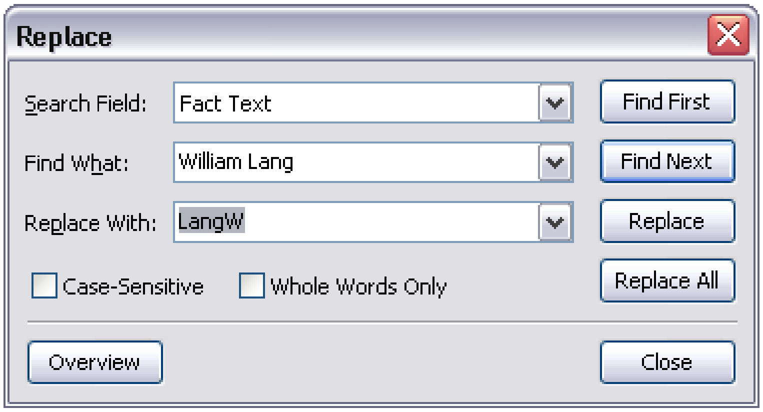
Find What: William Lang

☐ Case-Sensitive ☐ Whole Words Only

4. In the **Find What** field, type in the text you want to locate.

5. Click either the **Find First** or **Find Next** buttons.
   - Click the Find First button if you want to start searching from the first record in the spreadsheet.
   - Click the Find Next button if you want to start searching from the record you selected in the spreadsheet. This option will continue the search until it reaches the original record you started with.

6. Click the **Replace** button if you want to replace the text found with new text.



Search Field: Fact Text

Find What: William Lang

Replace With: LangW

☐ Case-Sensitive ☐ Whole Words Only

7. In the **Replace With** field, type in the new text you want to use.

8. Select the **Case-Sensitive** check box to locate matches of the word(s) and also when those words are capitalized.

9. Select the **Whole Words Only** check box to locate a particular word or phrase.

10. Click the **Replace All** button to replace all instances of the text you want to replace.

    If the Replace button is grayed out, you have selected a field in which you cannot replace text.

    When the find/replace process is complete, a message box details the the number of replacements made for this field.

10. Click **OK** to continue.

    If there are other fields in this spreadsheet that contain the original text you want to replace, you can now continue finding/replacing the text by changing the field selection.

If there are other spreadsheets that include fields in which you want to replace text, then you need to close out of the Find/Replace box and open that spreadsheet before continuing.

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

Related Topics

[About editing data]
[Using spelling tools]
[Copying/pasting data and records]
[Inserting/deleting data and records]
[Making global replacements]

## Copying/pasting data and records

Copying and pasting data in spreadsheet fields requires some forethought and care so that you do not break links already set within the text of a field. If you have text from one field that should be added to another, be careful to paste it after the period of the last sentence. If you right-click in a cell and paste the text in it, the new text will be inserted wherever your mouse pointer is placed.

You can also copy and paste a record in a spreadsheet. Doing so gathers all field data for a record and pastes it into a new record. The copy process also retains record links for short names and issues, as well as links to attached source files. However, you now have a duplicate record in the spreadsheet of your case. You should carefully edit the new copied record to differentiate it from the previous one in your case so that there is no confusion among staff when analyzing the document and its linked case elements.

To copy the Date & Time entry from one cell to the next, use the key command CTRL + '.

### ⊟ To copy/paste data

1. In the **Case Shortcuts** pane, click the icon for the spreadsheet (e.g., **Persons**) you want to use.
2. In the case record cell, highlight the text you want to copy, and right-click to click **Copy**.

   You can also click the Home ribbon, and then click Copy.
3. Click in the cell where you want to paste the text, then right-click, and click **Paste**.

   You can also click the Home ribbon, and then click Paste.

4. Navigate to another cell or record to save your changes.

### ⊟ To copy/paste records

1. In the **Case Shortcuts** pane, click the icon for the spreadsheet (e.g., **Documents**) you want to use.
2. Highlight the case record you want to copy.
3. On the **Home** tab, click the **More** submenu, and then click **Create Copy**.

   An exact copy of the record is added to the spreadsheet, including links to short names and issues.
4. Optional: If the original record is linked to a source file in a network folder, then you must reset the link to that file, if necessary.

Related Topics

About editing data
Using spelling tools
Finding/replacing data and records
Inserting/deleting data and records
Making global replacements

## Inserting/deleting data and records

Inserting records and deleting both data and records are simple procedures that can be done at any time. Be certain that you want to remove data or a record before doing so because once a it is permanently deleted, it can't be retrieved without restoring a backup copy of the case or manually re-entering it. Also use caution as data or records deleted from a case may affect linking between case elements and/or attached source files.

⚠ We recommend you make a backup copy of the case before deleting data or records. Once records are deleted, you cannot retrieve the data or records without restoring a backup copy of the case. You can use the Undo feature to restore deleted data *before* you navigate from the cell it was removed from.

### ⊟ To insert a record into a spreadsheet

New records can be added to a spreadsheet at any time by clicking on the New button located on the Home ribbon or pressing the Insert key on your keyboard. New records display at the bottom of a spreadsheet. Records are saved automatically as you navigate from record to record. To resort the spreadsheet in accordance with the sort order, click Refresh Spreadsheet located under the More button on the Home ribbon.

### ⊟ To insert a symbol into a record cell

1. Locate the record and cell area where the symbol will be placed.
2. On the **Home** ribbon, click **Symbol** to open the **Insert Symbol** dialog box.
3. In the **Insert Symbol** dialog box, select the symbol you want to use, then click the **Insert** button.
4. 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 in a record. The new record is automatically saved.

***To save a record, choose one of the following options:***

- Click in another spreadsheet record.
- Under New Record, on the Home ribbon, in the Record group, select another record type from the list.
- Click F5.
- Under More, on the Home ribbon, in the Record group, click Refresh Spreadsheet.
- Press the Insert key on the keyboard.
- Press the Down Arrow key.
- Press Tab repeatedly until you tab through all spreadsheet fields for that record and a new record row displays.

### ⊟ To delete data from a record cell

Delete text within a cell by simply selecting it and pressing the Delete key.

To use the Undo feature to restore deleted data, you must do so before you leave the cell. Once data is deleted and you have selected a new cell or record, it is permanently removed from the case.

### ⊟ To delete a record from a spreadsheet

***You can delete a record two ways:***

- Under More, on the Home ribbon, in the Record group, click Revert to delete the last record entered in the spreadsheet.
- Select the record in the spreadsheet and click Delete on the Home ribbon, in the Record group.

> If you delete an object, authority, or extract record that has annotated linked documents attached to it, the annotations will be deleted with the record. CaseMap will display a message when this occurs, displaying how many linked facts and annotations are attached to the record and will prompt you to confirm the deletion.

### ⊟ To delete all records in view

If necessary, you can delete all records in a spreadsheet. If you want to delete multiple records in a spreadsheet, first filter the spreadsheet to display only those records you want to delete, then use the Delete feature.

> ⚠ We recommend you use extreme caution when using this feature as records are immediately deleted from the case and cannot be retrieved without restoring a back-copy copy of the case.

1. On the **Case Tools** ribbon, click **Update Records,** and then click **Delete All Records in View**.
2. In the message box to confirm the number of records being deleted, click **OK**.
3. In the message box to confirm the removal again, click **Yes**.

   All records in the current spreadsheet view are now permanently removed from the case.
4. Click **OK** in the message box that displays the number of records deleted.

   Records not selected in the filter for removal remain in the spreadsheet.

Related Topics

About editing data
Using spelling tools
Finding/replacing data and records
Copying/pasting data and records
Making global replacements

## Making global replacements

Global field replacements involve copying data into multiple field cells at one time or updating/editing data in multiple field cells at one time.

***CaseMap offers the following utilities:***

- **Bulk Field Copy**

  The Bulk Field Copy utility copies data from one field to another field for all visible records in a spreadsheet view. Any existing data in the destination field is overwritten with the new text. You must have the case open exclusively to run this utility. Be certain to notify other users to exit the case before starting.

  For example, perhaps you created a custom, numeric field to track Social Security numbers and later realized that a numeric field does not allow hyphens. In this instance, you could create another custom field with a text type (alpha-numeric) to copy the SSN data from one field to another and then enter the hyphens. In this scenario, you would also add a preceding zero to the SSN for sorting purposes.

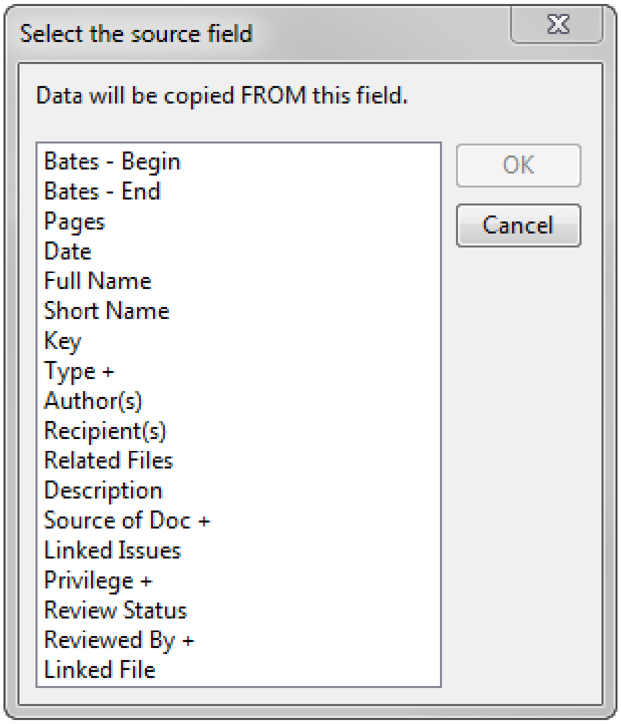
- **Bulk Field Updates**

  The Bulk Field Update utility updates a field with a specified value for all visible records in a spreadsheet. Any existing data values in the destination field are overwritten with the new value. You must have the case open exclusively to run this utility. Be certain to notify other users to exit the case before starting.

⚠ We recommend you make a backup copy of the case before making any global changes, like copying data into multiple fields. Once the process is completed, you cannot undo the changes without restoring a backup copy of the case.

### ⊟ To make global replacements

1. In the **Case Shortcuts** pane, click the icon for the spreadsheet you want to use.
2. On the **Case Tools** ribbon, click **Update Records**, and then click **Bulk Field Copy**.
3. In the message box, click **OK** if you have made a backup of the case.
4. Optional: Click **Yes** to open the case exclusively and you have already notified other users to exit the case.
5. Optional: Click **OK** to continue.
6. In the **Select the source field** dialog box, select the field that data will be copied from, then click **OK**.



Select the source field

Data will be copied FROM this field.

Bates - Begin
Bates - End
Pages
Date
Full Name
Short Name
Key
Type +
Author(s)
Recipient(s)
Related Files
Description
Source of Doc +
Linked Issues
Privilege +
Review Status
Reviewed By +
Linked File

7. In the **Select the destination** field, select the field that data will be copied into, the click **OK**.
8. In the message box, review the fields and records, then click **Yes**.

When the process completes, you receive a message indicating the number of successful records updated.

9. Click **OK** to continue.

10. Return to the spreadsheet to verify the data transfer for the selected fields.

### ⊟ To make global updates

1. In the **Case Shortcuts** pane, click the icon for the spreadsheet you want to use.

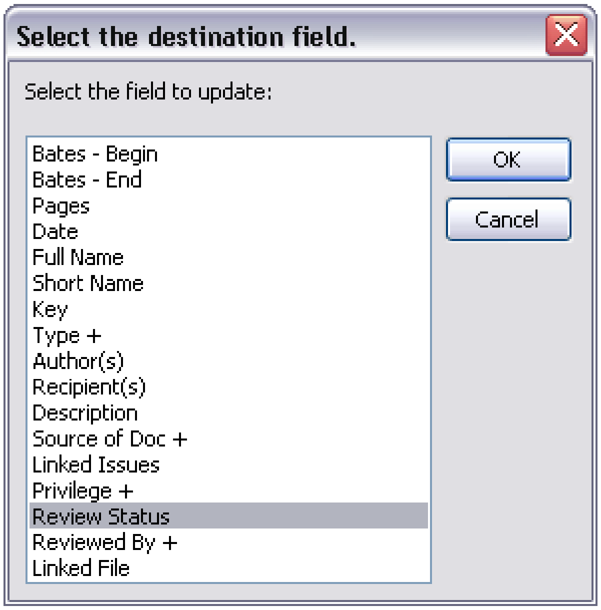
2. On the **Case Tools** ribbon, click **Update Records**, and then click **Bulk Field Update**.

3. In the message box, click **OK** if you have made a backup of the case.

4. Click **Yes** to open the case exclusively and you have already notified other users to exit the case.

5. Click **OK** to continue.

6. In the **Select the destination field** dialog box, select the field you want to update, then click **OK**.

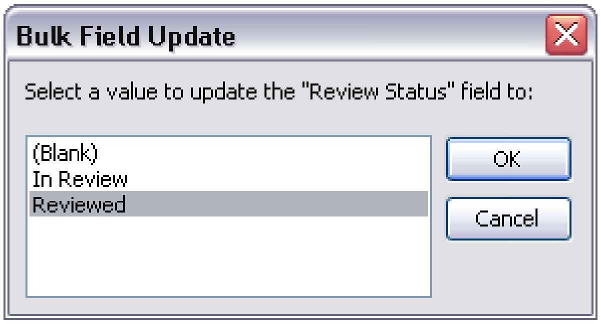


Select the destination field.

Select the field to update:

- Bates - Begin
- Bates - End
- Pages
- Date
- Full Name
- Short Name
- Key
- Type +
- Author(s)
- Recipient(s)
- Description
- Source of Doc +
- Linked Issues
- Privilege +
- Review Status
- Reviewed By +
- Linked File

7. In the **Bulk Field Update** dialog box, select an update mode, then click **OK**.



Bulk Field Update

Select a value to update the "Review Status" field to:

- (Blank)
- In Review
- Reviewed

8. In the message box, verify your selections, then click **Yes**.

   Notice that all fields now contain the updated value, inserted/appended/replaced text, etc., as you selected.

Related Topics

About editing data
Using spelling tools
Finding/replacing data and records
Copying/pasting data and records
Inserting/deleting data and records
About Case Tools

# *Reporting*

## About creating reports

Case spreadsheets are the raw material that makes up your CaseMap reports — many of which are required by the court. With a few mouse clicks, you can create professional reports instantly in Adobe® Acrobat, Microsoft® Word, or just printing them on paper.

Using the Facts spreadsheet you can easily turn your fact chronology into Motions for Summary Judgment and produce the list of facts that you're willing to stipulate for pre-trial motions.

CaseMap reports use the What-You-See-is-What-You-Get (WYSIWYG) principle, so what is displayed in your spreadsheet view is the same as what you see in your report. By clicking More, and then clicking the Print Preview button on the Reports ribbon, you can instantly see how your spreadsheet data will look in report form.

***With CaseMap, you have three primary means of creating reports:***

- **Standard Reports** — Basic spreadsheet reports are what you get when you click the Print button on any spreadsheet. What appears in the report is data from the fields and records in your current spreadsheet view.
- **Pre-built Reports** — CaseMap includes four pre-built reports that you can easily produce using a wizard: Privilege Log, By Issue Report, By Object Report, and a Summary Judgment. Access these reports from the Reports ribbon. See Save time by printing a pre-built report.
- **ReportBooks** — ReportBooks are compilations of case analysis spreadsheets rolled together in a polished package that includes a title page, table of contents, introduction page, and spreadsheet reports (each with their own title page). CaseMap has several pre-built ReportBooks that are part of every new case on you can build your own custom templates by copying or modifying a re-built ReportBook.

  For more information, see About ReportBooks.

### Save time by printing a pre-built report

CaseMap offers four pre-built reports that you can easily produce using a wizard. Reports can be printed to Microsoft® Word, Corel® WordPerfect, or HTML.

**CaseMap Pre-built Reports**

| Report Wizards | Description |
|---|---|
| Privilege Log | Facilitates the production of a report listing documents you have marked as privileged under attorney-client, attorney work product, or any privilege type you determine. |
| By Issue Report | Creates a comprehensive report of all the records on any spreadsheet (except Issues) linked to a select issue or set of issues. The data output for the report can be sent to Word, WordPerfect, or HTML. |
| By Object Report | Creates an organized report by object groups: facts grouped by document, facts grouped by person, documents grouped by persons, etc. |
| Summary Judgment | Helps you prepare Motions for Summary Judgment, Statements of Disputed Material Facts, and Memoranda In Opposition court filings. |

### Add title pages for polished reports

CaseMap reports all print with a default title page to produce a polished work product. You can decide whether to include a title page for your reports. And you can customize the content and look of title pages to suit the needs of your organization.

For more information, see Adding/editing report title pages.

### Embed linked documents in reports

Embedding linked documents in reports and ReportBooks printed to PDF files allows you to share the report and supporting files with others who do not have access to CaseMap or the case. Once the report or ReportBook is printed to a PDF file, spreadsheet records with linked documents or files will display with paperclip icons next to them. Clicking the paperclip icon opens the linked document in a new window and in its native application.

Fore more information, see Embedding linked documents in reports.

### Import reports to reuse spreadsheet views and custom fields

You can import a saved report that contains spreadsheet views or custom fields that you want to use in another CaseMap case. Doing so save you time in rebuilding a spreadsheet view or recreating a custom field in a new case.

For more information, see Importing text files.

### Save exported reports in network folders

We recommend that you save exported copies of reports and ReportBooks in a Reports folder on your network. This allows other case users to access these reports for reference and tracking purposes. Reports saved to your computer are not accessible by other users.

For more information, see Exporting spreadsheet data, Exporting/importing ReportBooks.

Related Topics

About printing reports
Creating a filtered report

## 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 from. Numerous print options and considerations are available for you to make the right adjustments and add any final style touches before you print.

### ⊟ Adjust spreadsheet views to design reports

As you customize your spreadsheet view, you are essentially customizing a report at the same time. The choices you make are integral to the design of your final report layout.

***Adjusting a spreadsheet view simultaneously adjusts your printed report structure:***

- Adding or removing fields in your spreadsheet = adding or removing fields in your report.
- Filtering case records in your spreadsheet = filtering records that print in reports.
- Sorting data, tagging records, and altering the row height all affect your spreadsheet and report layout.

### ⊟ Use Print Preview to review reports before printing

The Print Preview window is a great tool to use to review your report before printing it on paper or emailing an electronic file of it out for staff or client review. Because reports print in the What-You-See-is-What-You-Get (WYSIWYG) mode, you will see if you need to hide fields or make formatting adjustments before finalizing the report. Once in Print Preview mode, you can select your print options from the toolbar there as well as from the Print and Batch Print buttons on the File tab.

For more information, see Changing report print options.

### ⊟ Select from a variety of reporting output options

When printing reports, CaseMap offers a variety of output options that you can produce for the best work product. Reference the following table to determine the output you want.

**Reporting Output Options**

| Output | Description |
|---|---|
| Adobe Acrobat | Print to an Acrobat PDF file from any spreadsheet, and choose whether to embed any linked documents in the report. On the Reports ribbon, click Print or PDF Current View and then click either Print PDF or Print PDF (Email). On the File tab, click Print to PDF and then click Print to PDF on the submenu, or click Batch Print Documents and click To PDF. |
| Microsoft Excel | Export any spreadsheet to a Microsoft Excel spreadsheet. On the Reports ribbon, click Send Current View To and then click Microsoft Excel. |
| TimeMap Timelines | Produce TimeMap timelines from the Facts or Documents spreadsheet. On the Reports ribbon, clicking Send Current View to and then click LexisNexis TimeMap. |
| Web Page (HTML) | Use the Web Browser option to create an HTML report. This option creates a series of HTML pages with a first page, prior page, next page, and last page navigation bar that makes it easy to browse through the report. On the Reports ribbon, click Send Current View To and then click Web Browser (HTML).<br>When you select the HTML option, you can then choose: As Web Pages, Zip as Web Pages, Zip and Email as Web Pages. The first two choices prompt you to save the output to a specified location on your computer. CaseMap creates two web pages for you. The email option attaches a zipped file of the web pages in an email with explanatory text. |
| Word Processor Output | Use CaseMap data to create motions or briefs by preparing a spreadsheet with data you want in your word processor document. On the Reports ribbon, click Send Current View To and then select either Microsoft Word or Corel WordPerfect. |

Report printing options are also accessible on the File tab by clicking Send To.

## Review report options and considerations

Reference the following table to learn about different print options and considerations that affect report output.

**Reporting Options and Considerations**

| Options | Description |
|---|---|
| Data Overflow | When the data from the last row of a report page overflows to the next |

| Reporting Options and Considerations | |
|---|---|
| **Options** | **Description** |
| | page, asterisks print in those cells where the data did not overflow. The asterisks let you know that the data displayed for that top row is a continuation from the previous page. |
| Embedded Links | For more information, see Embedding linked documents in reports. |
| Field Widths | Adjust the scaling of your report by shrinking the field widths so the report is forced to fit on a fixed number of page widths. Set this option by selecting Reports ribbon > ···More > Page Setup > Page > Shrink field widths to fit report one page wide. This option adjusts the widths of large text and description fields to force the report to fit on one page. |
| Field Wrapping | CaseMap automatically wraps fields that overflow onto the following page(s) of the printed report. When the pages needed for the first set of records have printed, the next set of records begins printing on a new page.<br>* If your spreadsheet has more fields than will fit on one page width, use the Repeat Fields feature to ensure printing important fields. Set this option in the Print dialog box accessible from the File tab and then clicking Print. |
| Font Size | Adjust the scaling of a report by shrinking the font size so the report is forced to fit on the specified number of pages wide. Set this option by selecting Reports ribbon > ···More > Page Setup > Page > Shrink font size to fit report on one page(s). |
| Other Print Options | You can print the list dialog boxes that display when you double-click the numbers in the cells of # fields, the Evaluation Comparison box, and CaseWide fact bars. You can also print the Authorities & Extracts pane in the Research area of CaseMap. |
| Repeat Fields | When your spreadsheet has more fields than will fit in one page width, you can use the Repeat Fields feature to print important fields on every report page. Set this option by selecting Reports ribbon > ···More > Page Setup > Page > Repeat Fields. |
| Row Height | To print reports with the same row height, clear the Auto-Fit check box on the Report Options tab in the Page Setup box.<br>* If you print a report without the Auto-Fit option, the current row height may not allow for all of the text in each cell to print. |
| Tags | Spreadsheets with tagged records print the red icon in the Tag fields on reports. Cancel the tag filter if you do not want tag icons printing at the left margin of every report. |
| Title Pages | By default, CaseMap generates a title page for each report. You can edit the look and contents of the title page and determine whether it |

**Reporting Options and Considerations**

| Options | Description |
|---|---|
| | prints for a specific report by selecting Reports ribbon > ···More > Page Setup. |
| WYSIWYG Printing | CaseMap offers What-You-See-Is-What-You-Get printing. If you filter the data in your Facts spreadsheet down to 25 facts, then your printed report contains only 25 facts. The fields that are in view in a spreadsheet are also included in the printed report. Filter data and hide fields that you do not want to include in a report. |

## Review common report questions

Common report questions are related to the print options in the Page Setup dialog box. For more information, see Changing report print options.

### How to print spreadsheet rows same height in reports

By default, CaseMap automatically adjusts the size of the font being used to print reports so that all the fields in a spreadsheet fit neatly into the number of page widths you specify. Shrinking a report to fit on a fixed number of page widths typically results in a report that is easier to work with.

Clear the Auto-fit check box if you want the same row height for spreadsheet rows on printed reports. However, the row height may not allow for all text in a cell to print on the report.

### How to print field(s) on every report

Use the Repeat Fields feature to print important fields on every report page, including those pages containing fields that could not fit in the first page width.

## Select grid or record view

When you print reports to Word, WordPerfect, or HTML, you have the option of either Grid View (horizontal) or Record View (vertical) record display. This selection is accessible on a shortcut menu from the Reports ribbon when you click on these report output options.

***Change the grid font color:***

On the View ribbon, click Grid Font. In the Font box, adjust the font style, size, and script.

***Change the gridline and shade color:***

On the File tab, click Options and then click the the Printing tab. In the Printing area, select the gridline and shade color you want use. The default color is gray.

> If a printed report does not include visible grid lines, and the grid lines are visible in print preview mode, change the grid line and shading color option to black. This option is accessible from the Tools menu by clicking Options and then click on the Printing tab in the Options dialog box.

Related Topics

About creating reports
Creating a filtered report
Changing report print options
Adding/editing report title pages

## Report print options

Printing spreadsheet data or reports is as simple as selecting the printer destination or the export file type/program you want to use. In addition, CaseMap provides a variety of print options that include adjusting the paper size/source, orientation, report scaling options, font type and size, gridlines, row breaks, inclusion of important fields, and more. Changes to these settings apply to all reports in the case.

***Print options include:***

- Printer destination
- Print Preview mode
- Print to PDF (save or email)

***Access Page Setup options from:***

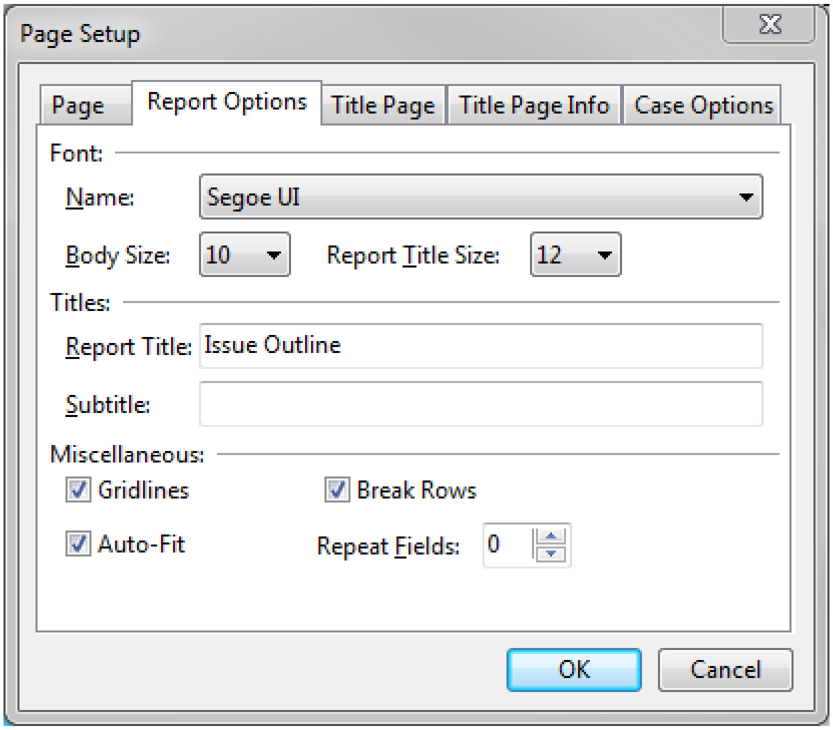
- Reports ribbon > ···More > Page Setup button
- File tab > Print > Page Setup
- Print Preview window > Page Setup

***Access Print options from by clicking the File tab > Print > Print Options.***

### ⊟ To change standard report print options

1. On the **Reports** menu, click ···**More** and on the sub-menu, click **Page Setup**.
2. In the **Page Setup** dialog box, click on the **Page** tab to adjust paper size, orientation, printer source and report scaling options.
3. In the **Scaling** area, select from the following:
    - **Normal**
    - **Shrink field widths to fit report on one page wide** — The default setting, which automatically adjusts the font size in reports so all fields in a spreadsheet will print in the number of page widths specified.
    - **Shrink font size to fit report on [X] page(s) wide** — Then type in the number of pages you want.

4. Click on the **Report Options** tab to adjust the font type and size for both the report title and body text.



Name: Segoe UI

Body Size: 10

Report Title Size: 12

Report Title: Issue Outline

Subtitle:

☑ Gridlines

☑ Break Rows

☑ Auto-Fit

Repeat Fields: 0

5. In the **Miscellaneous** area, select check boxes to include the following options:
    - **Gridlines** — Select to have gridlines print in reports. Clear to remove the gridlines from printing.
    - **Auto-Fit** — Select Auto-Fit for the row height to automatically adjust to the amount of text entered, row heights may vary. Clear Auto-fit to ensure the same spreadsheet row height, however the row height may not allow for all text in a cell to print.
    - **Break Rows** — Select to ensure that each spreadsheet row prints on the same page. Clear to have text in a spreadsheet row to break and continue printing on the next page.
    - **Repeat Fields** — The Repeat Fields feature allows you to select the number of important fields to print on every report page, including those pages that could not fit in the first page width.

> We recommend that you keep the Miscellaneous settings checked for a cleaner report output. If you clear the Gridlines check box, the lines are removed from the printed report. If you clear the Break Rows check box, information from one record row may break and print on the following page. If you clear the Auto-fit check box, information will truncate onto the next page.

6. Click **OK** to save changes.

### To change PDF print options

Within CaseMap, you can convert spreadsheet views, reports, and ReportBooks into PDF files — even if you don't have a license for Adobe® Acrobat (Standard or Professional) on your computer.

For more information, see Batch printing PDFs.

***Access PDF print options from:***

- File tab > Print > Yes > Print Options
- Reports ribbon > ReportBooks > a selected ReportBook > Print menu

> If you are selecting print options within Acrobat, refer to the Adobe Acrobat documentation for details.

**⊟ To save or email a PDF report**

On the Case Tools ribbon, click the PDF button PDF, click Print to PDF or Print to PDF (Email), and then select Yes in the message box to continue.

Your current spreadsheet view will be printed in report form to an Adobe Acrobat PDF file or included as an attachment in a Microsoft Outlook email.

Related Topics

About printings reports
Report title pages
Hiding documents when printing

## Report title pages

You can add a title page to any report you print or convert to Adobe® Acrobat. Rather than creating a title page each time you generate a report, you can edit the default title page format that works for all reports. You can also decide whether to include a title page or remove it from the report. The title page feature is turned on by default when you create a new case. Changes to the report title page affect all reports in the case. These settings are accessible in the Page Setup dialog box on the File tab.

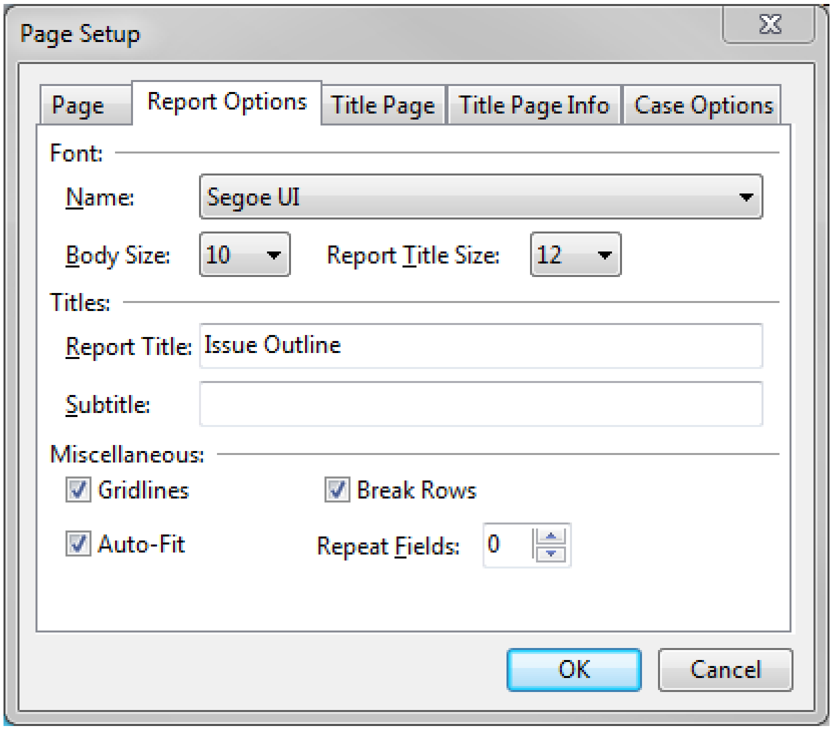
***Title page settings include the following:***

- Report titles and subtitles
- Text orientation and alignment
- Border styles and colors
- Graphics
- Date and time
- Page Number

- Organization and case name
- Author/scribe short names
- Confidentiality statement

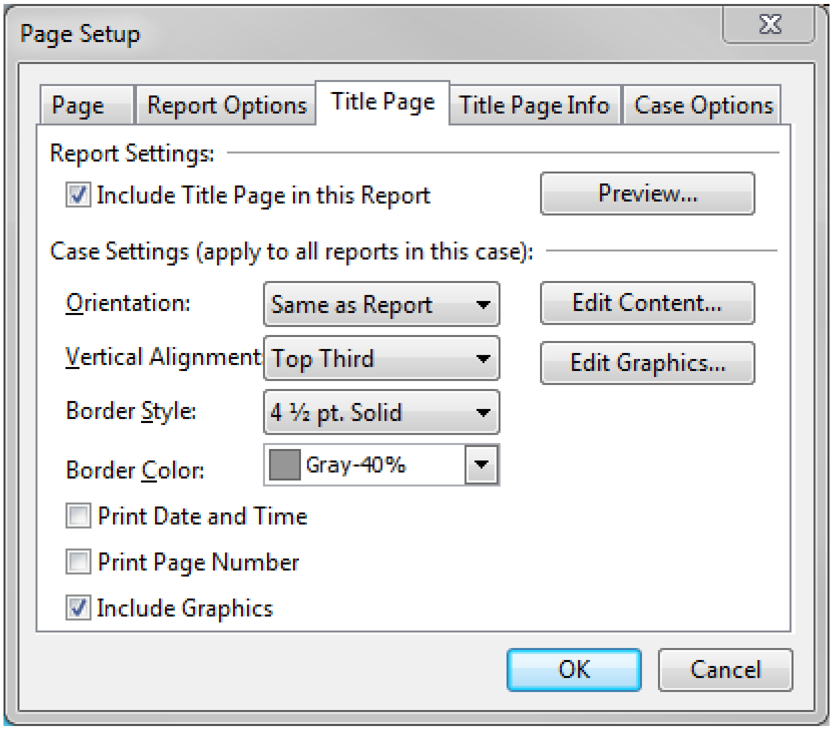
### ⊟ To add/edit report title pages

1. On the **Reports** menu, click ···**More** and on the sub-menu, click **Page Setup**.
2. In the **Page Setup** dialog box, click the **Title Page** tab.
3. Click on the **Report Options** page to modify the report title and subtitle.



Font:
Name: Segoe UI
Body Size: 10
Report Title Size: 12
Titles:
Report Title: Issue Outline
Subtitle:
Miscellaneous:
☑ Gridlines
☑ Break Rows
☑ Auto-Fit
Repeat Fields: 0

4. In the **Titles** area, type in the name you want for the **Report Title** and **Subtitle** fields, then click **OK**.
5. Click on the **Title Page** tab to modify most title page content.
6. In the **Report Settings** area, select the **Include Title Page in this Report** check box to include a title page for reports.



Report Settings:

☑ Include Title Page in this Report

Case Settings (apply to all reports in this case):

Orientation: Same as Report

Vertical Alignment: Top Third

Border Style: 4 ½ pt. Solid

Border Color: Gray-40%

☐ Print Date and Time

☐ Print Page Number

☑ Include Graphics

Clear this check box to disable the title page from printing with a report.

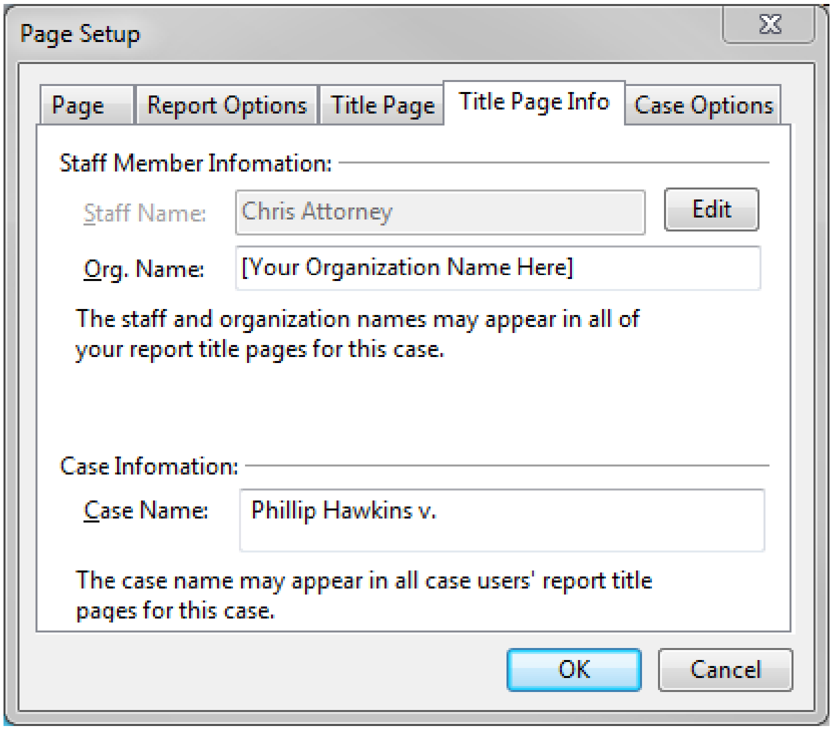
7. Click the **Preview** button to review the current title page before printing.

8. In the **Case Settings (apply to all reports in the case)** area:

   - In the **Orientation** listing, click whether you want **Portrait**, **Landscape**, or **Same as Report**.
   - In the **Vertical Alignment** listing, click on the alignment option you want: **Top**, **Top Third**, **Middle**, **Bottom Third**, **Bottom**.
   - In the **Border Style** listing, click the point size for the border width.
   - In the **Border Color** listing, click the color scale you want to use.
   - Select check boxes to include these options: **Print Date and Time**, **Print Page Number**, and **Include Graphics**.
   - Click the **Edit Content** button to modify the content that prints on each page, including typing or pasting text, modifying the font size and color, adjusting text alignment, inserting symbols or specific fields.
   - Click the **Edit Graphics** button to preview current graphics, and modify the header and footer graphic settings (like your organization's logo). You can also remove, load, and save graphics for title pages.

6. Click the **Preview** button to review your changes.

7. Click the **Title Page Info** tab to customize title page text.



Staff Member Infomation:

Staff Name: Chris Attorney

Org. Name: [Your Organization Name Here]

The staff and organization names may appear in all of your report title pages for this case.

Case Infomation:

Case Name: Phillip Hawkins v.

The case name may appear in all case users' report title pages for this case.

8. Next to the **Staff Name** field, click the **Edit** button to change the name that print on the report.

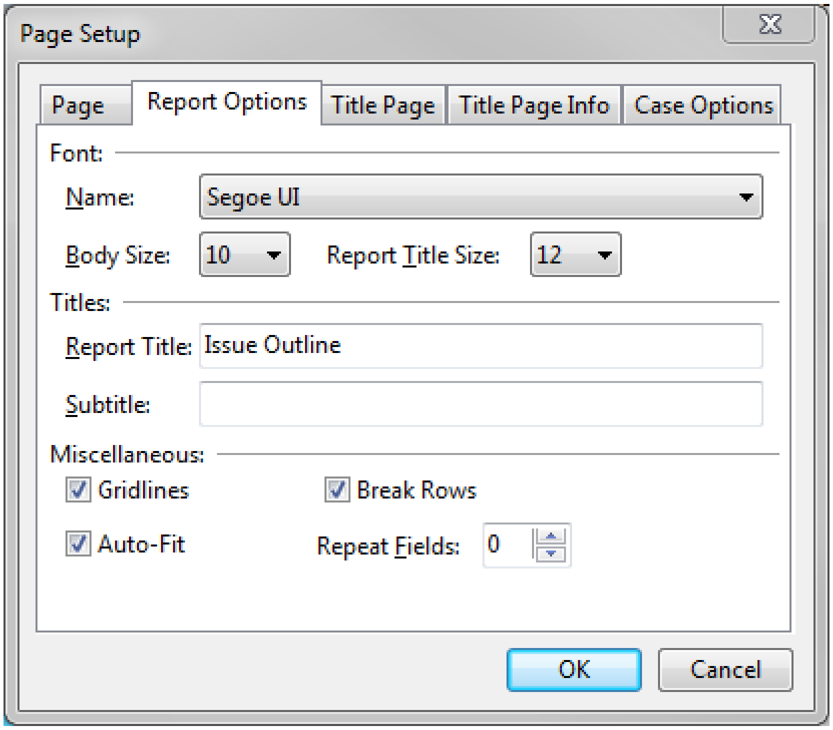
   The staff name that displays by default is the same as the staff member name in the Case Logon dialog box. If you change the name here, it will be changed in the case staff member list.

9. In the **Org. Name** field, type in the name of your organization.

10. In the **Case Name** field, verify the case name or type in the name you want to print on title pages.

    The case name entered may appear in all report title pages for this case.

11. Click on the **Case Options** tab to adjust whether to print titles, subtitles, the date and time, confidentiality statement, author/scribe short names, and page number on reports.



Font:
Name: Segoe UI
Body Size: 10
Report Title Size: 12
Titles:
Report Title: Issue Outline
Subtitle:
Miscellaneous:
☑ Gridlines
☑ Break Rows
☑ Auto-Fit
Repeat Fields: 0

These settings apply to all reports in the case.

12. In the **Confidentiality Statement** box, type in the text you want to use.

13. Click **OK** to save the settings.

Related Topics

[About printing reports]
[Changing report print options]

## Creating a filtered report

Creating a filtered report in CaseMap simply involves filtering data and modifying spreadsheet views to capture key case information. Once filters are applied and the spreadsheet contains the records and field view you want, you can preserve that data by printing a hard copy, printing to a PDF file to store in a Reports folder along with network directory cases, or export it to another application, if needed. You may also save the filtered report criteria to re-run later when the case is populated with more data.

⊟ **To create a filtered report**

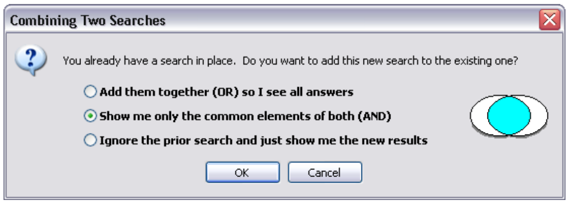
1. In the **Case Shortcuts** panel, click on the icon for the spreadsheet you want to use.
2. Right-click in a record cell to access the filter tools.
3. In the **Selection** field type in the text you want to use or select a field status from the drop-down listing.
4. Click **Filter by Selection** to run the search.

   The spreadsheet now displays only those records that meet the selected search criteria.

   Notice that this filter status displays in the spreadsheet title bar and at the bottom left of the screen.

5. To access another filter to the spreadsheet, right-click in another record cell and type in the text you want to use or select a field status from the drop-down listing.
6. In the **Combining Two Searches** box, select either of the following options, then click **OK**.

   - **Add them together (OR) so I see all answers** to include all records that contain one or both of the search criteria.
   - **Show me only the common elements of both (AND)** to include only those records that contain both search criteria.
   - **Ignore the prior filter and just show me the new results** to display only the results based on the latest filter implemented.



Combining Two Searches

You already have a search in place. Do you want to add this new search to the existing one?

○ Add them together (OR) so I see all answers
● Show me only the common elements of both (AND)
○ Ignore the prior search and just show me the new results

   The spreadsheet now displays only those records that meet your search criteria.

   Notice that the filter status in the spreadsheet title bar (and bottom left of the screen) is updated to reflect the combined search criteria.

### To save the filtered search status

1. In the spreadsheet title bar, click the **Save** button to save this report.
2. In the **Save Search As** box, type a name for the filter, then click **OK**.
3. Click the **Cancel Search** button on the spreadsheet title bar to refresh the spreadsheet.

   The saved search now displays under My Saved Searches on the Search menu.

### To print the filtered report

1. Before you print this report, you may first want to hide any fields that might keep the content within page margins.

   Right-click on field headers such as Attorney Notes or Linked Issues and select Hide Field.

2. To print a copy of the report, on the **Home** ribbon, click **Sort & Filter**, and then click **My Saved Searches** on the sub-menu.
3. On the shortcut menu, click on the filtered report you saved to re-run the filter.
4. On the **Reports** menu, click **More**, and then click **Print Preview** to review the report.
5. In the message box, click **Yes** to continue.
6. In **Print Preview** mode, click on the **Prior Page** ◀ and/or the **Next Page** ▶ button(s) to page through the report.
7. To print this report:
   - In Print Preview mode, click the Print, Print To PDF, or Print To PDF (Email) buttons to use these options. Otherwise, click Close.
   - On the Reports ribbon > ···More menu, click Page Setup to select the print option(s) you want for your report output.

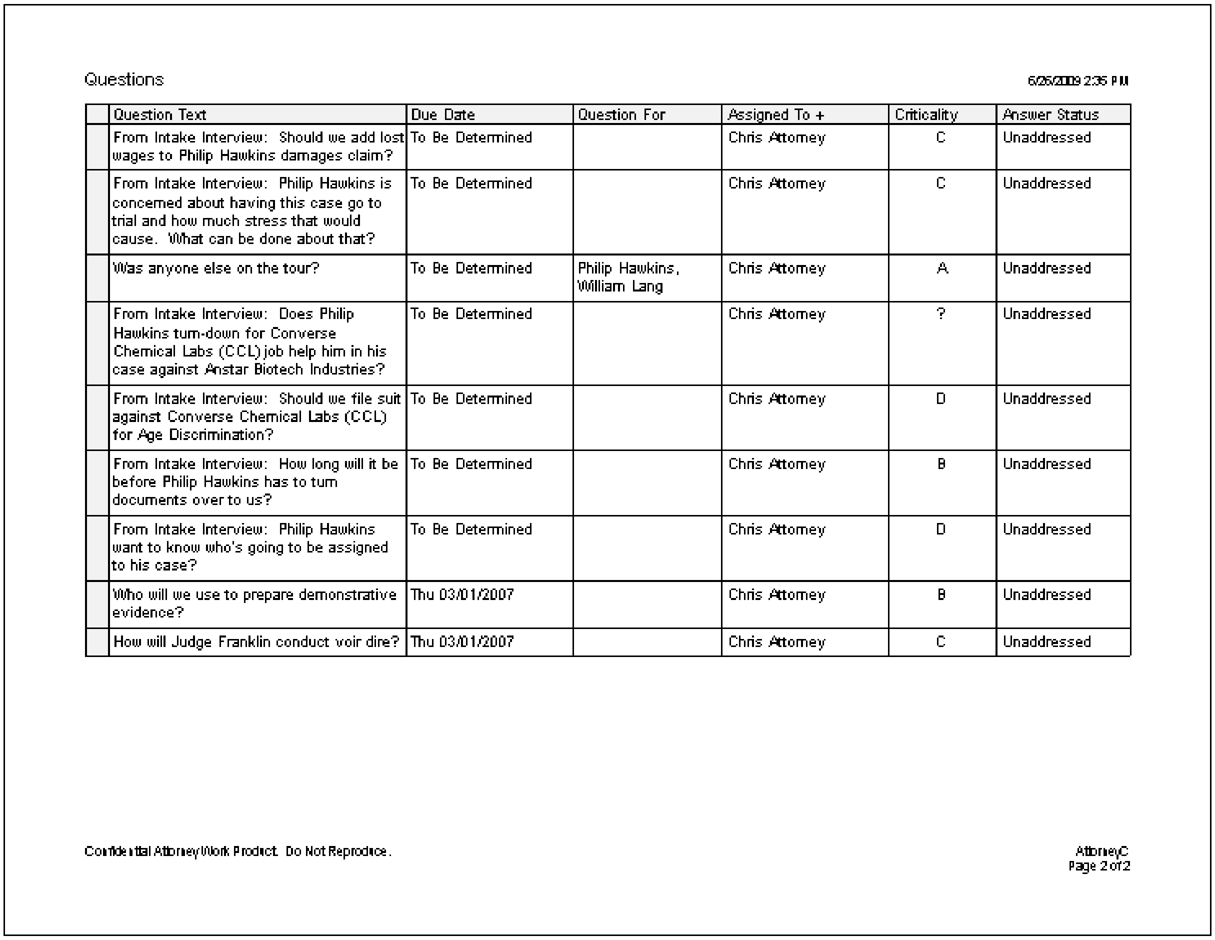
Related Topics

[About creating reports]
[About printing reports]
[Saving searches]

## Emailing a report of questions

When the Questions spreadsheet begins to fill with tasks assigned to case staff, you can simply sort the records by person or another status and instantly produce a Microsoft® Outlook email that includes an Adobe® Acrobat PDF file attachment of the report based on data in the current spreadsheet view. Each email automatically includes text that you can customize or modify, and includes a link where the recipient can download a copy of Adobe® Reader, if needed.

> This reporting ability is available for all CaseMap spreadsheets by clicking on the Reports ribbon and then clicking Print or PDF Current View > Print to PDF (Email). Use this feature to quickly update clients, senior staff, or other case staff of any changes or the current state of essential case information.



Questions

6/26/2009 2:35 PM

| | Question Text | Due Date | Question For | Assigned To + | Criticality | Answer Status |
|---|---|---|---|---|---|---|
| | From Intake Interview: Should we add lost wages to Philip Hawkins damages claim? | To Be Determined | | Chris Attorney | C | Unaddressed |
| | From Intake Interview: Philip Hawkins is concerned about having this case go to trial and how much stress that would cause. What can be done about that? | To Be Determined | | Chris Attorney | C | Unaddressed |
| | Was anyone else on the tour? | To Be Determined | Philip Hawkins, William Lang | Chris Attorney | A | Unaddressed |
| | From Intake Interview: Does Philip Hawkins turn-down for Converse Chemical Labs (CCL) job help him in his case against Anstar Biotech Industries? | To Be Determined | | Chris Attorney | ? | Unaddressed |
| | From Intake Interview: Should we file suit against Converse Chemical Labs (CCL) for Age Discrimination? | To Be Determined | | Chris Attorney | D | Unaddressed |
| | From Intake Interview: How long will it be before Philip Hawkins has to turn documents over to us? | To Be Determined | | Chris Attorney | B | Unaddressed |
| | From Intake Interview: Philip Hawkins want to know who's going to be assigned to his case? | To Be Determined | | Chris Attorney | D | Unaddressed |
| | Who will we use to prepare demonstrative evidence? | Thu 03/01/2007 | | Chris Attorney | B | Unaddressed |
| | How will Judge Franklin conduct voir dire? | Thu 03/01/2007 | | Chris Attorney | C | Unaddressed |

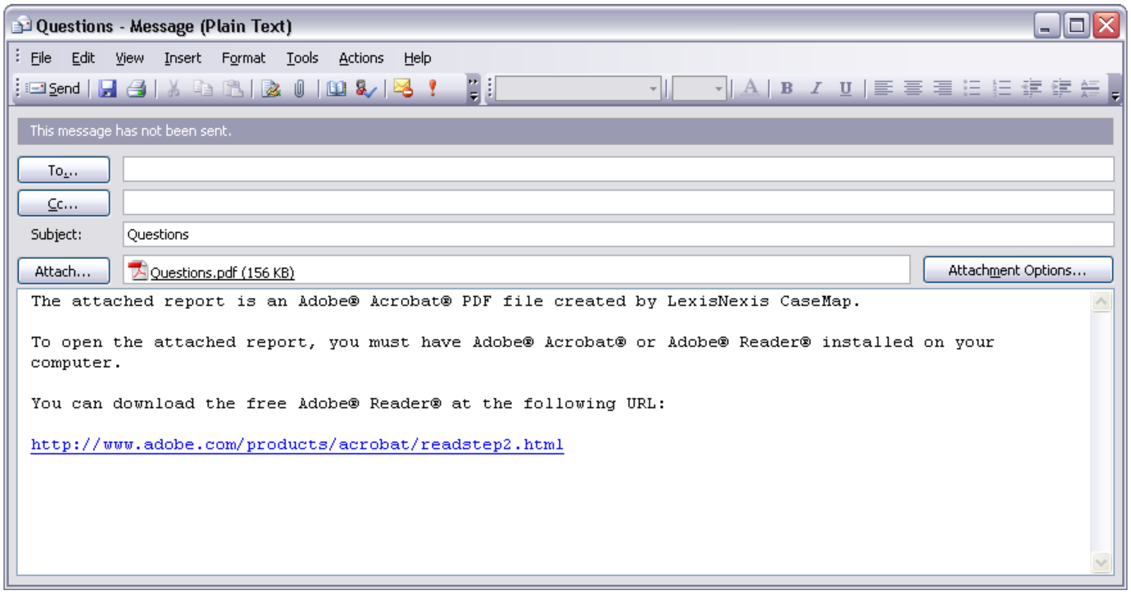
Confidential Attorney Work Product. Do Not Reproduce.

AttorneyC
Page 2 of 2

## To email a report of questions

1. In the **Case Shortcuts** pane, click on the **Questions** icon.
2. In the **Assigned To** field, run a filter on the staff you want to include for questions records.
3. Next hide two fields, so that the primary fields will print on one page.
    - Right-click on the Answer field header and click Hide Field
    - Right-click on the Linked Elements field header and click Hide Field.
4. On the **Reports** menu, click **PDF**, and then click **Print to PDF (Email)**.

    In the message box, click Yes to continue.


Questions - Message (Plain Text)
File Edit View Insert Format Tools Actions Help
Send
This message has not been sent.
To...
Cc...
Attach...
Attachment Options...

Subject: Questions

Questions.pdf (156 KB)

```
The attached report is an Adobe® Acrobat® PDF file created by LexisNexis CaseMap.

To open the attached report, you must have Adobe® Acrobat® or Adobe® Reader® installed on your
computer.

You can download the free Adobe® Reader® at the following URL:

http://www.adobe.com/products/acrobat/readstep2.html
```

When the printing process is complete, a Microsoft Outlook email displays on-screen with the Questions report automatically included as a PDF file attachment.

Notice the the email also includes pre-written content identifying that a report is attached in Acrobat and was created by CaseMap. It also includes a link to download the free Adobe Reader software, if the recipient needs to view the report. The email content can be modified to include any information and instructions you wish to add or delete from the template.

6. You can now modify the email contents and send it to the appropriate staff members or your client.

**Related Topics**

About creating reports
Analyzing and linking questions
Performing basic searches

## Printing Pre-built Reports

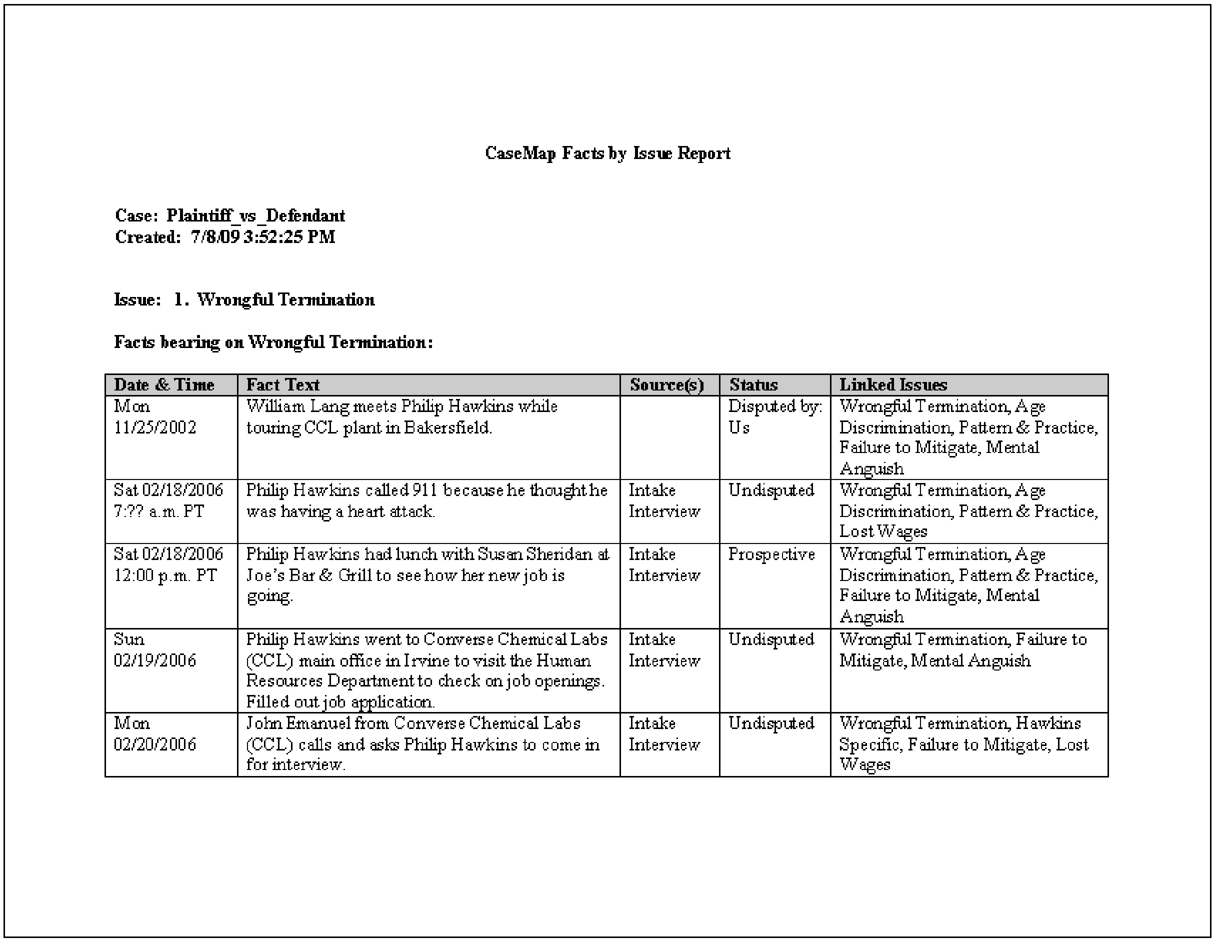
### *Printing a By Issue report*

Any time you need to produce a report to show what records are linked to issues on any spreadsheet (except the Issues spreadsheet), you can use the By Issue Report Wizard. This pre-built Report menu option uses a wizard to help you quickly create a report that lists selected issues in distinct sections with associated records under each issue.

***By Issue reports may include:***

- Facts grouped by issue
- Documents grouped by issue
- Witnesses grouped by issue
- Research grouped by issue
- And more

You can use the default settings or customize the content of the report to suit your needs. Setting changes are automatically saved for the next time you run the report.



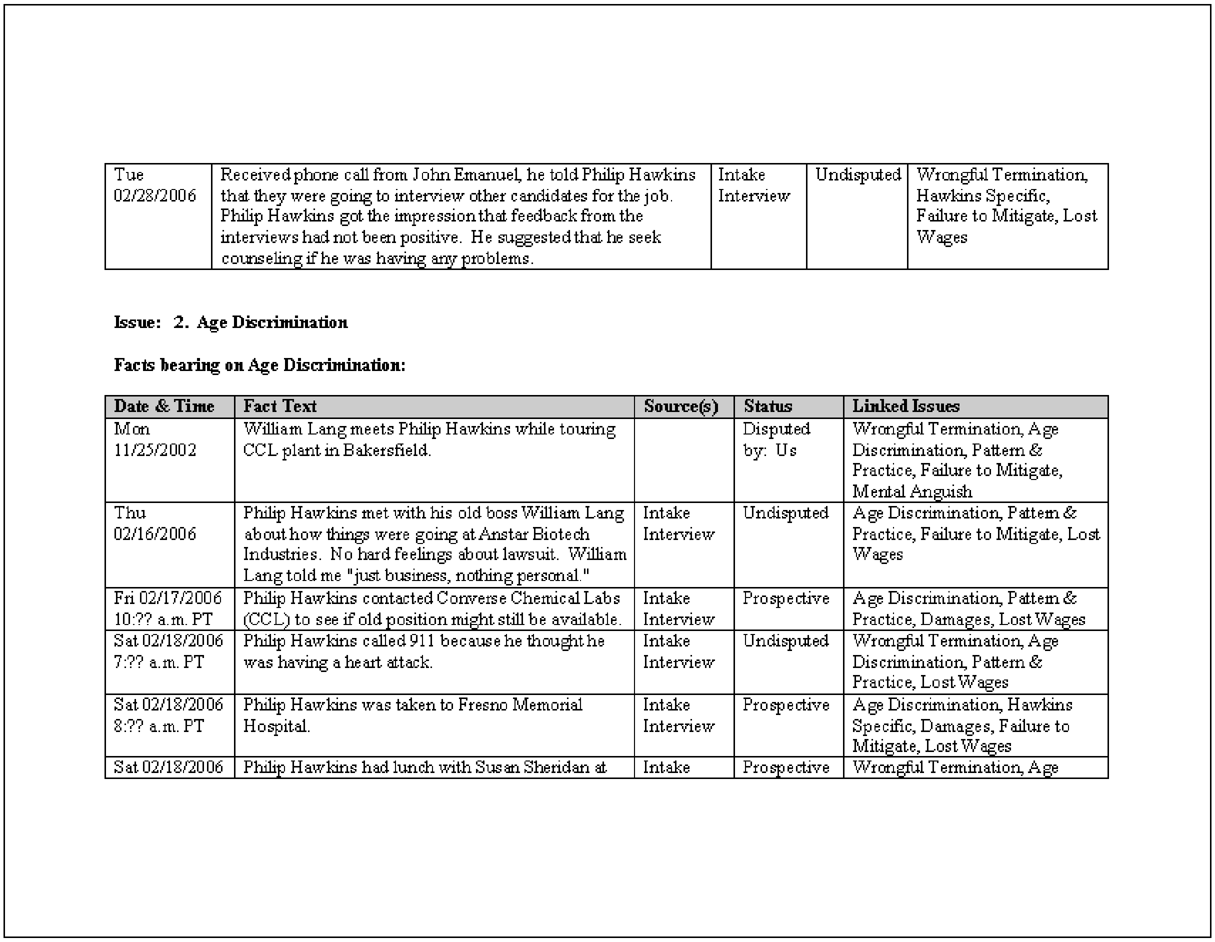
**CaseMap Facts by Issue Report**

**Case: Plaintiff_vs_Defendant**
**Created: 7/8/09 3:52:25 PM**

**Issue: 1. Wrongful Termination**

**Facts bearing on Wrongful Termination:**

| Date & Time | Fact Text | Source(s) | Status | Linked Issues |
|---|---|---|---|---|
| Mon 11/25/2002 | William Lang meets Philip Hawkins while touring CCL plant in Bakersfield. |  | Disputed by: Us | Wrongful Termination, Age Discrimination, Pattern & Practice, Failure to Mitigate, Mental Anguish |
| Sat 02/18/2006 7:?? a.m. PT | Philip Hawkins called 911 because he thought he was having a heart attack. | Intake Interview | Undisputed | Wrongful Termination, Age Discrimination, Pattern & Practice, Lost Wages |
| Sat 02/18/2006 12:00 p.m. PT | Philip Hawkins had lunch with Susan Sheridan at Joe's Bar & Grill to see how her new job is going. | Intake Interview | Prospective | Wrongful Termination, Age Discrimination, Pattern & Practice, Failure to Mitigate, Mental Anguish |
| Sun 02/19/2006 | Philip Hawkins went to Converse Chemical Labs (CCL) main office in Irvine to visit the Human Resources Department to check on job openings. Filled out job application. | Intake Interview | Undisputed | Wrongful Termination, Failure to Mitigate, Mental Anguish |
| Mon 02/20/2006 | John Emanuel from Converse Chemical Labs (CCL) calls and asks Philip Hawkins to come in for interview. | Intake Interview | Undisputed | Wrongful Termination, Hawkins Specific, Failure to Mitigate, Lost Wages |



| | | | | |
|---|---|---|---|---|
| Tue 02/28/2006 | Received phone call from John Emanuel, he told Philip Hawkins that they were going to interview other candidates for the job. Philip Hawkins got the impression that feedback from the interviews had not been positive. He suggested that he seek counseling if he was having any problems. | Intake Interview | Undisputed | Wrongful Termination, Hawkins Specific, Failure to Mitigate, Lost Wages |

**Issue: 2. Age Discrimination**

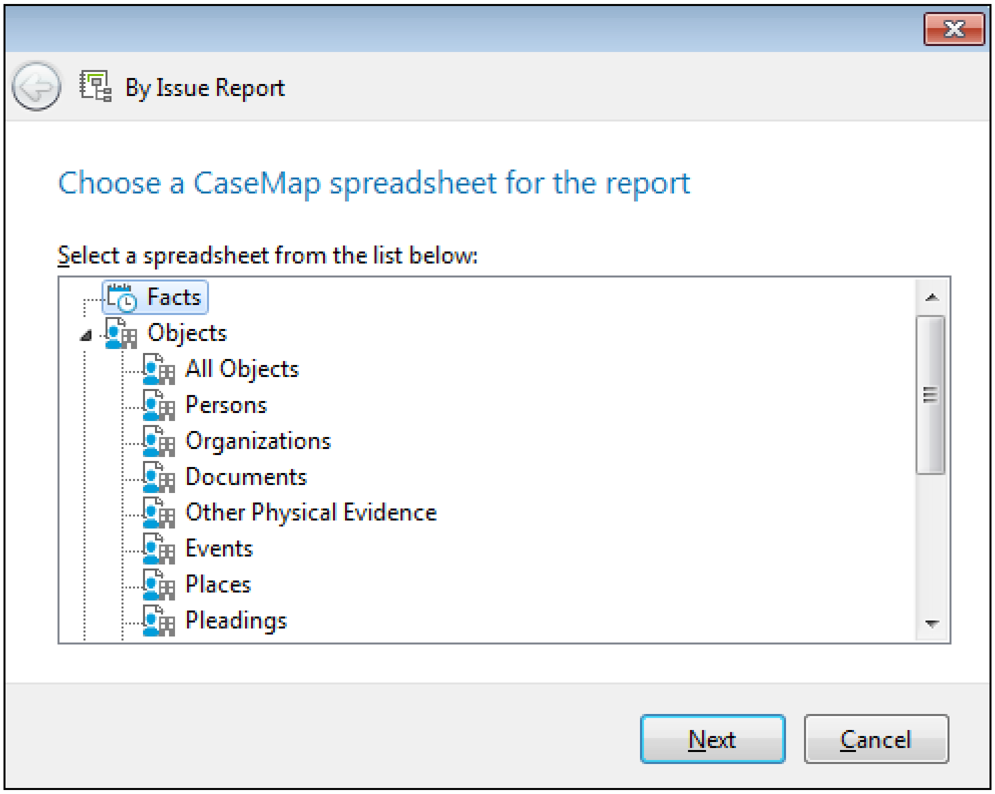
**Facts bearing on Age Discrimination:**

| Date & Time | Fact Text | Source(s) | Status | Linked Issues |
|---|---|---|---|---|
| Mon 11/25/2002 | William Lang meets Philip Hawkins while touring CCL plant in Bakersfield. | | Disputed by: Us | Wrongful Termination, Age Discrimination, Pattern & Practice, Failure to Mitigate, Mental Anguish |
| Thu 02/16/2006 | Philip Hawkins met with his old boss William Lang about how things were going at Anstar Biotech Industries. No hard feelings about lawsuit. William Lang told me "just business, nothing personal." | Intake Interview | Undisputed | Age Discrimination, Pattern & Practice, Failure to Mitigate, Lost Wages |
| Fri 02/17/2006 10:?? a.m. PT | Philip Hawkins contacted Converse Chemical Labs (CCL) to see if old position might still be available. | Intake Interview | Prospective | Age Discrimination, Pattern & Practice, Damages, Lost Wages |
| Sat 02/18/2006 7:?? a.m. PT | Philip Hawkins called 911 because he thought he was having a heart attack. | Intake Interview | Undisputed | Wrongful Termination, Age Discrimination, Pattern & Practice, Lost Wages |
| Sat 02/18/2006 8:?? a.m. PT | Philip Hawkins was taken to Fresno Memorial Hospital. | Intake Interview | Prospective | Age Discrimination, Hawkins Specific, Damages, Failure to Mitigate, Lost Wages |
| Sat 02/18/2006 | Philip Hawkins had lunch with Susan Sheridan at | Intake | Prospective | Wrongful Termination, Age |

## To print a By Issue report

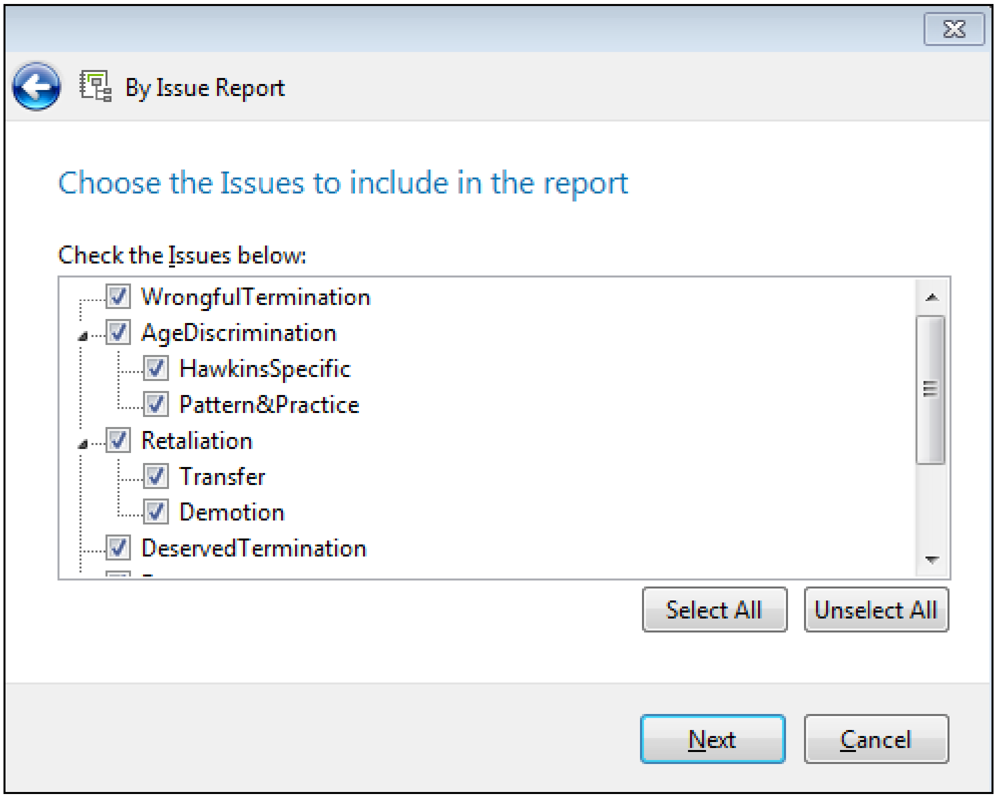
1. On the **Reports** menu, click **By Issue**.

2. In the **Choose a CaseMap spreadsheet for the report** dialog box, click the icon for the spreadsheet you want, then click **Next**.


By Issue Report
Choose a CaseMap spreadsheet for the report
Select a spreadsheet from the list below:
Facts
Objects
All Objects
Persons
Organizations
Documents
Other Physical Evidence
Events
Places
Pleadings
Next
Cancel

3. In the **Do you want to customize the report** dialog box, click **Yes, I want to customize the report**, then click **Next**.

4. In the **Choose the Issues to include in the report** dialog box, notice that all issues are selected by default.



Choose the Issues to include in the report

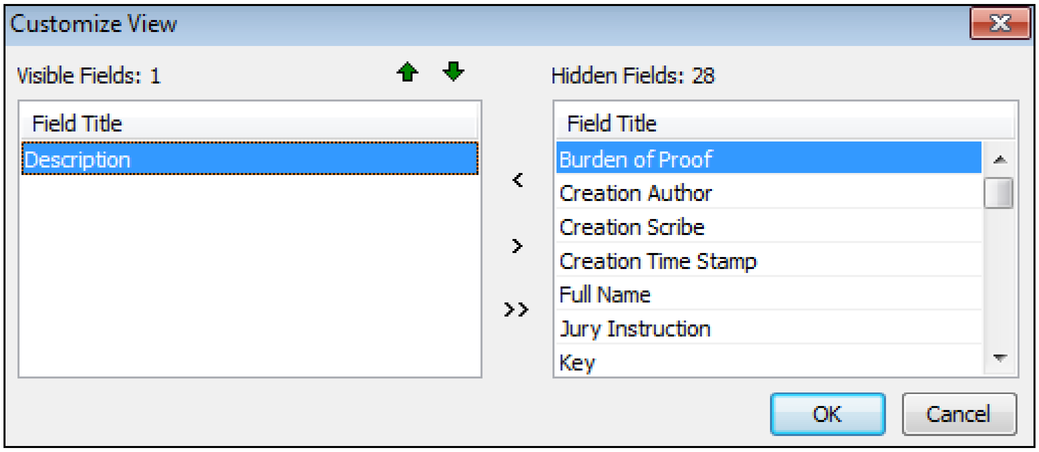
Check the Issues below:

- ☑ WrongfulTermination
- ☑ AgeDiscrimination
  - ☑ HawkinsSpecific
  - ☑ Pattern&Practice
- ☑ Retaliation
  - ☑ Transfer
  - ☑ Demotion
- ☑ DeservedTermination

5. Select or clear check boxes for issues, then click **Next**.

6. In the **Do you want to include any additional 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.



Visible Fields: 1

| Field Title |
|---|
| Description |

Hidden Fields: 28

| Field Title |
|---|
| Burden of Proof |
| Creation Author |
| Creation Scribe |
| Creation Time Stamp |
| Full Name |
| Jury Instruction |
| Key |

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

Use the Move Up and Move Down buttons ⬆ ⬇ to organize the viewing order for the report.

7. Click **Next** to continue.

8. In the **What Fact fields do you want to show in the report** dialog box, select whether to print fields in the current spreadsheet view or only those displayed in the **Selected fields** box.

   Click Customize to add or organize the fields to suit your needs, then click OK.

9. In the **What format do you want to use for this report** dialog box, select output format, then click **Next**.

10. Click **Finish** to print the report.

    Notice that all records linked to an issue are displayed in separate tables for each issue.

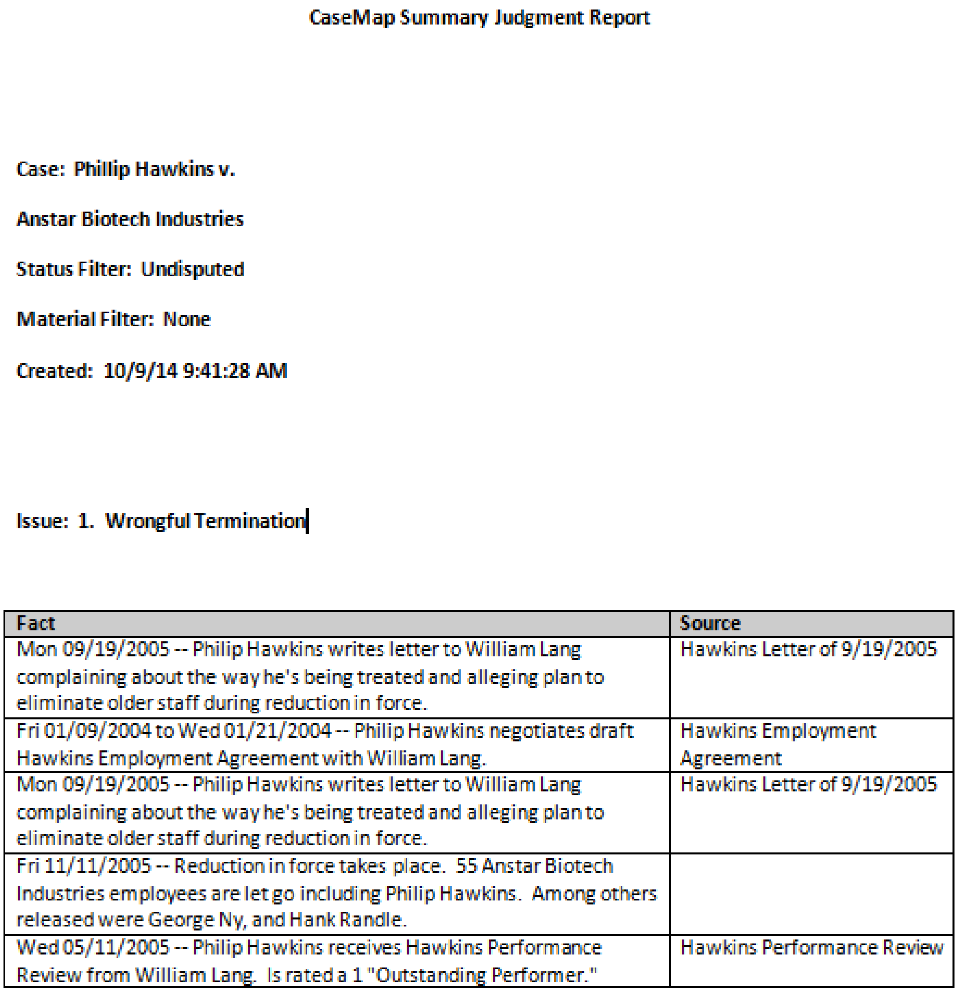
    You can now save the report as a Word file or PDF file, and save the it in the network folder where you store reports.

Related Topics

About creating reports
About printing reports

### *Printing a Summary Judgment report*

Using the pre-built Report menu option of Summary Judgment Report, you can quickly print all your undisputed material facts with selected case issues in a Microsoft® Word document. This report lists selected issues in distinct sections with the associated disputed or undisputed facts under each issue. You can use the default setting or customize the content of the report to suit your needs. Setting changes are automatically saved for the next time you run the report.



CaseMap Summary Judgment Report

**Case: Phillip Hawkins v.**

**Anstar Biotech Industries**

**Status Filter: Undisputed**

**Material Filter: None**

**Created: 10/9/14 9:41:28 AM**

**Issue: 1. Wrongful Termination**

| Fact | Source |
|---|---|
| Mon 09/19/2005 -- Philip Hawkins writes letter to William Lang complaining about the way he's being treated and alleging plan to eliminate older staff during reduction in force. | Hawkins Letter of 9/19/2005 |
| Fri 01/09/2004 to Wed 01/21/2004 -- Philip Hawkins negotiates draft Hawkins Employment Agreement with William Lang. | Hawkins Employment Agreement |
| Mon 09/19/2005 -- Philip Hawkins writes letter to William Lang complaining about the way he's being treated and alleging plan to eliminate older staff during reduction in force. | Hawkins Letter of 9/19/2005 |
| Fri 11/11/2005 -- Reduction in force takes place. 55 Anstar Biotech Industries employees are let go including Philip Hawkins. Among others released were George Ny, and Hank Randle. | |
| Wed 05/11/2005 -- Philip Hawkins receives Hawkins Performance Review from William Lang. Is rated a 1 "Outstanding Performer." | Hawkins Performance Review |

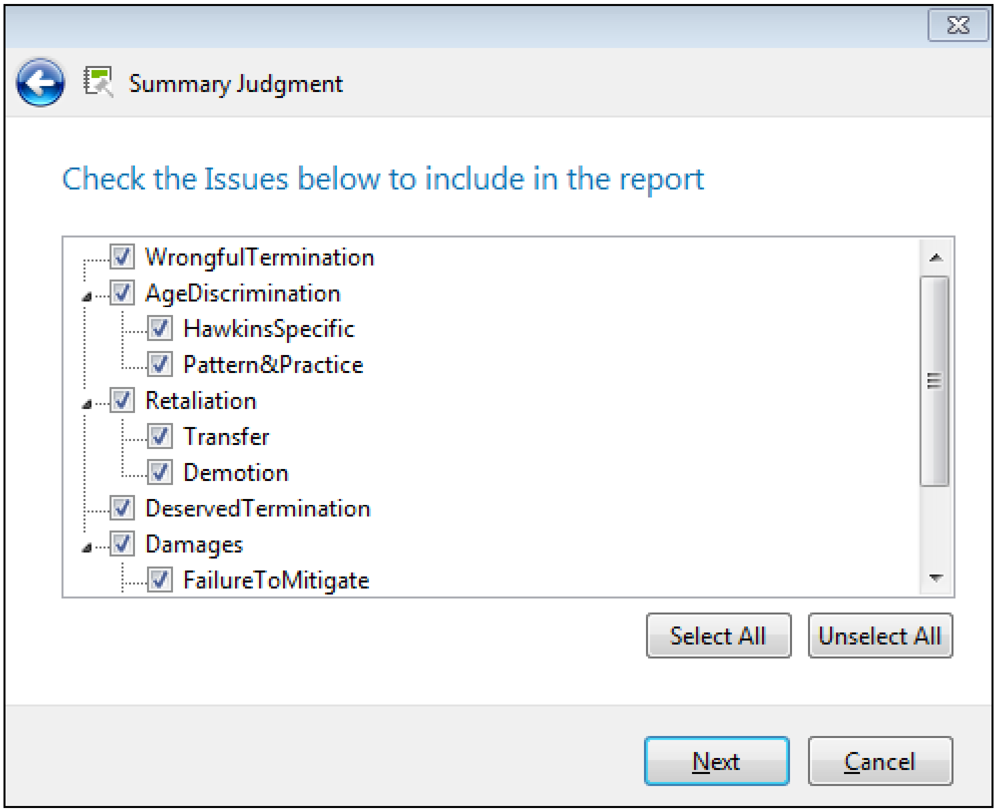
### To print a Summary Judgment Report

1. On the **Reports** menu, click **Summary Judgment**.
2. In the **Do you want to customize the report** dialog box, select one of the following:
    - No, I want the report to use CaseMap's default options.
    - Yes, I want to customize the report.
3. Perform one of the following:

    If you clicked No, click Next, and then select output format. Click **Next** and then click **Finish** to print the report.

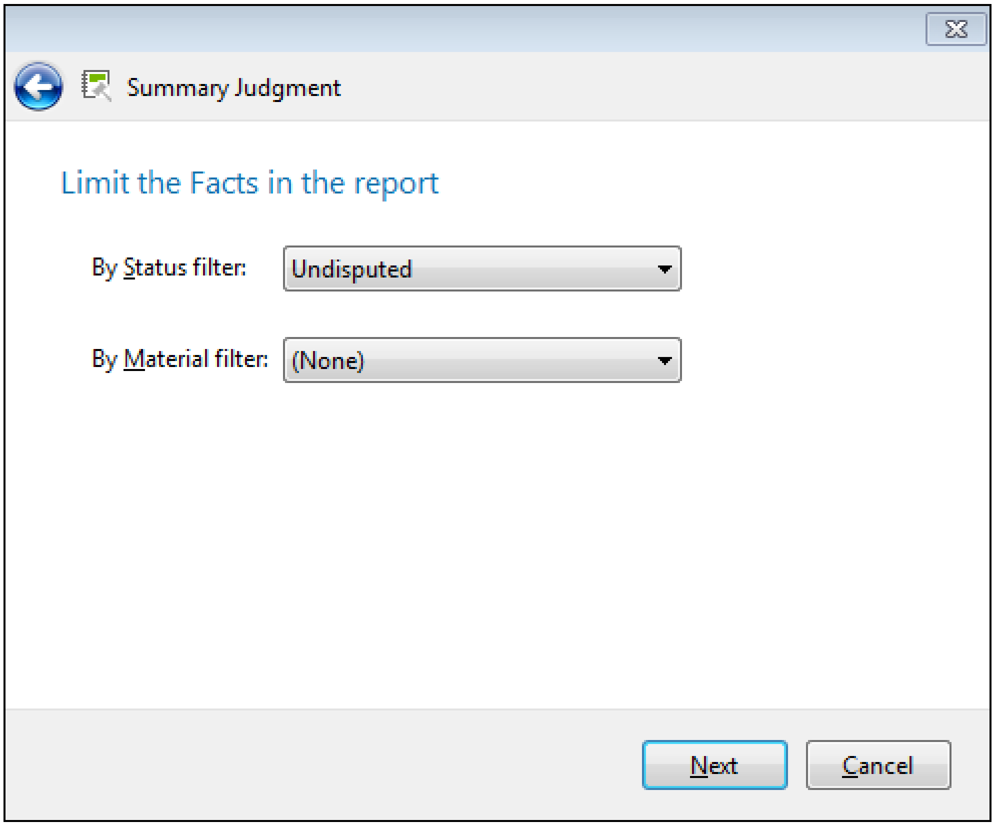
    If you clicked Yes, click **Next** to continue.

4. In the **Check the Issues below to include in the report** dialog box, notice that all issues are selected by default.


Summary Judgment
Check the Issues below to include in the report
☑ WrongfulTermination
☑ AgeDiscrimination
☑ HawkinsSpecific
☑ Pattern&Practice
☑ Retaliation
☑ Transfer
☑ Demotion
☑ DeservedTermination
☑ Damages
☑ FailureToMitigate
Select All
Unselect All
Next
Cancel

5. Select or clear check boxes for issues, then click **Next**.

6. In the **Fact Type** dialog box, click on the disputed status in the **By Status filter** listing.



Limit the Facts in the report

By Status filter: Undisputed

By Material filter: (None)

The default setting is Undisputed. If you are filing a statement of fact other than a Motion for Filing Summary Judgment, click the appropriate status filter in the listing.

7. In the **Material** filter listing, click on the material relevance status, then click **Next**.

8. In the **How do you want to arrange the Facts in the report** dialog box, select the table or list format, and then click **Next**.

9. In the **What format do you want to use for this report** dialog box, select output format, then click **Next**.

10. Click **Finish** to print the report.

    Notice that all facts with the disputed and material statuses you selected, as well as those linked to selected issues, are included in the report.

    You can now save the report as a Word file or PDF file, and save the it in the network folder where you store reports.

Related Topics

About creating reports

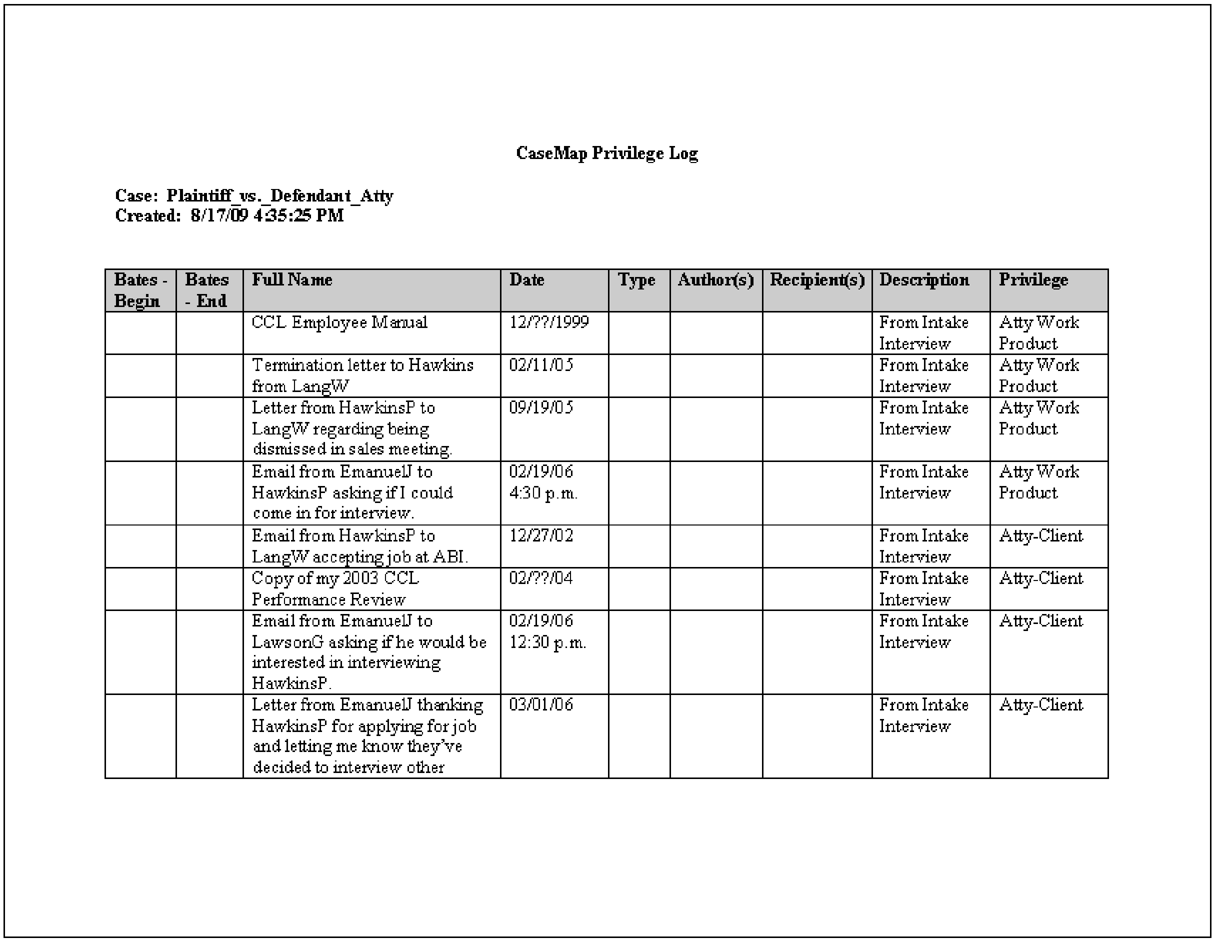
About printing

### *Printing a Privilege Log*

Creating a Privilege Log allows you to quickly print a report listing the document you have marked as privileged under attorney-client, attorney work product, or any privilege type you determine. You may also print a report listing those documents that are marked as not privileged.

The Privilege Log Wizard is a pre-built report option on the Reports ribbon and is also available in DocPreviewer. The wizard guides you through selecting the privilege types and document fields to include in the log, as well as choosing the order the documents display in the log. You can use the default settings or customize the content of the report to suit your needs. Setting changes are automatically saved for the next time you run the report. When you are finished, the log is printed as a table in Microsoft® Word.

> If you have a subscription to DocPreviewer, the pre-built Privilege Log is also accessible in the Manage Documents pane.



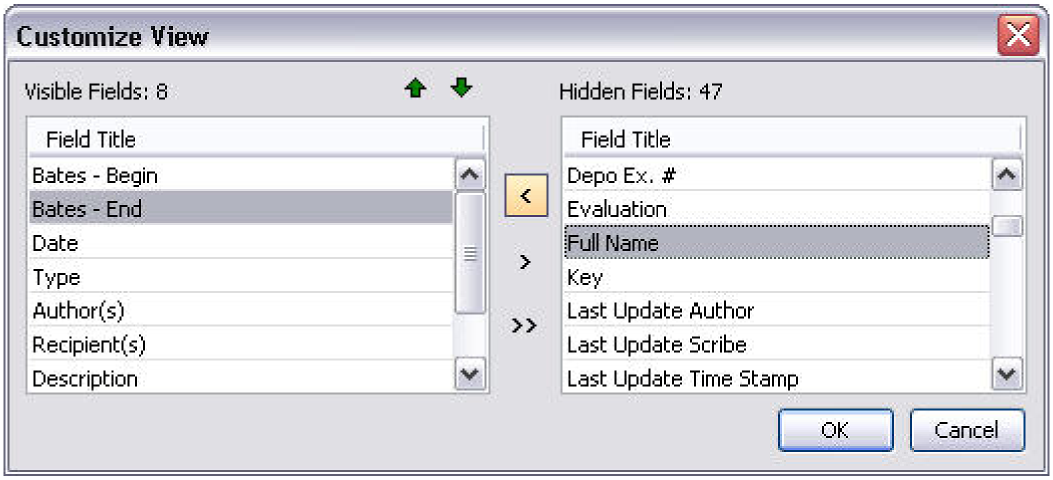
**CaseMap Privilege Log**

**Case: Plaintiff_vs._Defendant_Atty**
**Created: 8/17/09 4:35:25 PM**

| Bates - Begin | Bates - End | Full Name | Date | Type | Author(s) | Recipient(s) | Description | Privilege |
|---|---|---|---|---|---|---|---|---|
| | | CCL Employee Manual | 12/??/1999 | | | | From Intake Interview | Atty Work Product |
| | | Termination letter to Hawkins from LangW | 02/11/05 | | | | From Intake Interview | Atty Work Product |
| | | Letter from HawkinsP to LangW regarding being dismissed in sales meeting. | 09/19/05 | | | | From Intake Interview | Atty Work Product |
| | | Email from EmanuelJ to HawkinsP asking if I could come in for interview. | 02/19/06 4:30 p.m. | | | | From Intake Interview | Atty Work Product |
| | | Email from HawkinsP to LangW accepting job at ABI. | 12/27/02 | | | | From Intake Interview | Atty-Client |
| | | Copy of my 2003 CCL Performance Review | 02/??/04 | | | | From Intake Interview | Atty-Client |
| | | Email from EmanuelJ to LawsonG asking if he would be interested in interviewing HawkinsP. | 02/19/06 12:30 p.m. | | | | From Intake Interview | Atty-Client |
| | | Letter from EmanuelJ thanking HawkinsP for applying for job and letting me know they've decided to interview other | 03/01/06 | | | | From Intake Interview | Atty-Client |

**To print a Privilege Log**

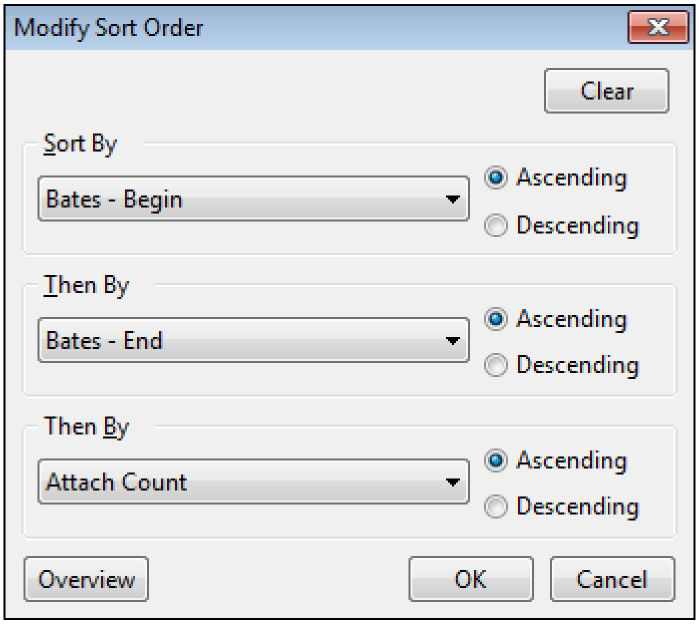
1. On the **Reports** menu, click **Privilege Log**.
2. In the **Select privilege types to include in the log** dialog box, select the check box for the privilege types you want to include in the log: **Atty Work Product**, or **Atty-Client.**
3. Click **Next** to continue.
4. In the dialog box, notice the default fields that are automatically included for use in the report.
5. Click the **Customize** button to select additional fields and/or hide any pre-selected fields for the log, then click **OK**.


Customize View
Visible Fields: 8
Hidden Fields: 47
Field Title
Bates - Begin
Bates - End
Date
Type
Author(s)
Recipient(s)
Description
<
>
>>
Field Title
Depo Ex. #
Evaluation
Full Name
Key
Last Update Author
Last Update Scribe
Last Update Time Stamp
OK
Cancel

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

Use the Move Up and Move Down buttons ⬆ ⬇ to organize the viewing order for the report.

6. Click **Next** to continue.
7. Click the **Modify** button to adjust the field sort order.



Sort By: Bates - Begin ● Ascending ○ Descending

Then By: Bates - End ● Ascending ○ Descending

Then By: Attach Count ● Ascending ○ Descending

8. In the **Sort By** listing, select the primary sort field for the log order and then select its **Ascending/Descending** order.

9. In the **Then By** listing, select the secondary sort field and its **Ascending/Descending** order.

   You have the option to add a third field sort option, if needed.

10. Click **OK** to save the settings.

11. Click **Next** to continue.

12. Click **Finish** to print the report in Microsoft Word.

    Notice that all fields selected in the wizard print in the log and in the sort order you determined.

    You can now save the report as a Word file or PDF file, and save it in the network folder where you store reports.

Related Topics

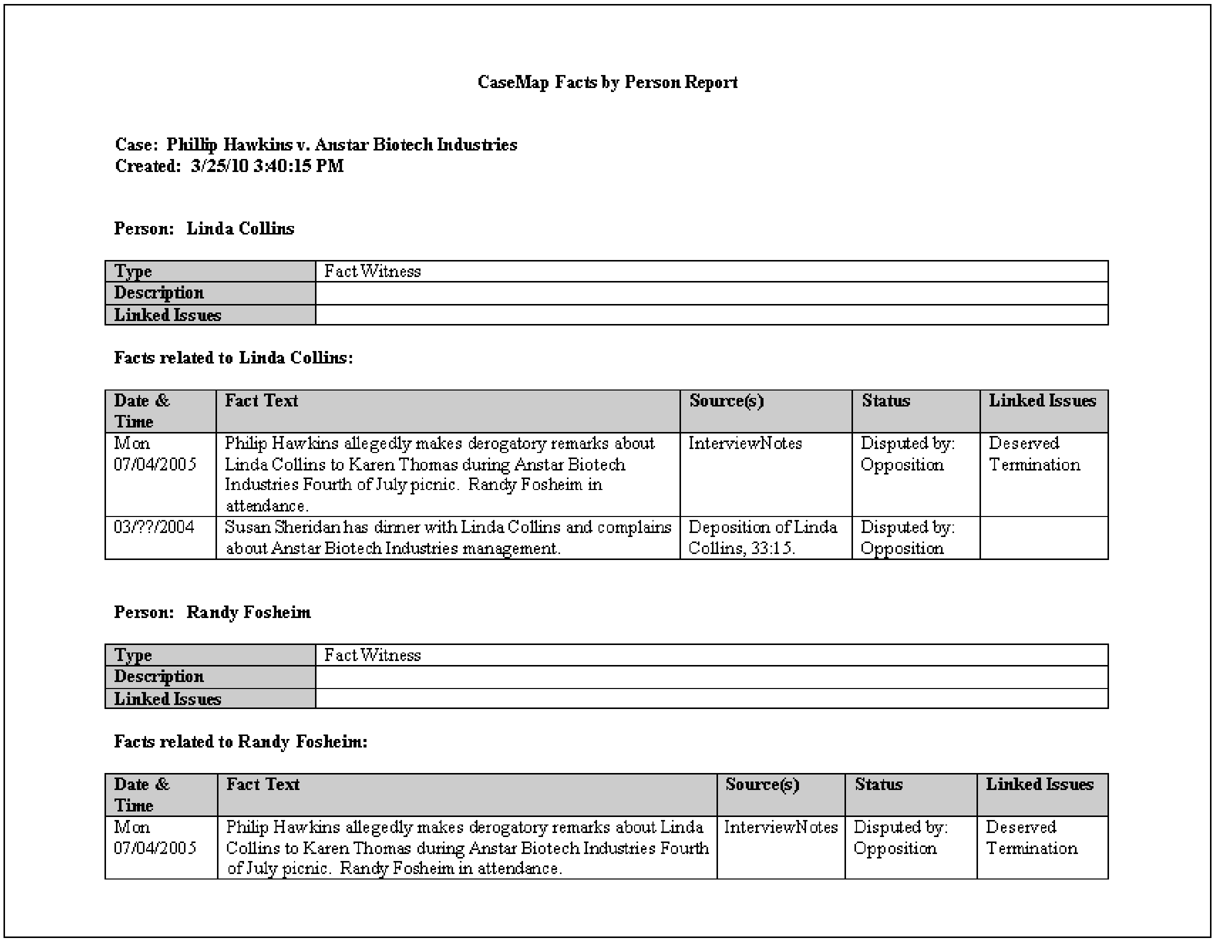
About creating reports
About printing

### *Printing a By Object report*

The By Objects Report Wizard allows you the opportunity to create reports based on object groupings. The wizard comes from four pre-set report options, or you can create your own custom report. The wizard allows you to choose which fields to show for the objects and the linked facts.

***By Object Report Wizard pre-built options include:***

- Facts grouped by Document
- Facts grouped by Person
- Facts grouped by Proceeding
- Documents grouped by Person
- Custom



**CaseMap Facts by Person Report**

**Case: Phillip Hawkins v. Anstar Biotech Industries**
**Created: 3/25/10 3:40:15 PM**

**Person: Linda Collins**

| | |
|---|---|
| **Type** | Fact Witness |
| **Description** | |
| **Linked Issues** | |

**Facts related to Linda Collins:**

| Date & Time | Fact Text | Source(s) | Status | Linked Issues |
|---|---|---|---|---|
| Mon 07/04/2005 | Philip Hawkins allegedly makes derogatory remarks about Linda Collins to Karen Thomas during Anstar Biotech Industries Fourth of July picnic. Randy Fosheim in attendance. | InterviewNotes | Disputed by: Opposition | Deserved Termination |
| 03/??/2004 | Susan Sheridan has dinner with Linda Collins and complains about Anstar Biotech Industries management. | Deposition of Linda Collins, 33:15. | Disputed by: Opposition | |

**Person: Randy Fosheim**

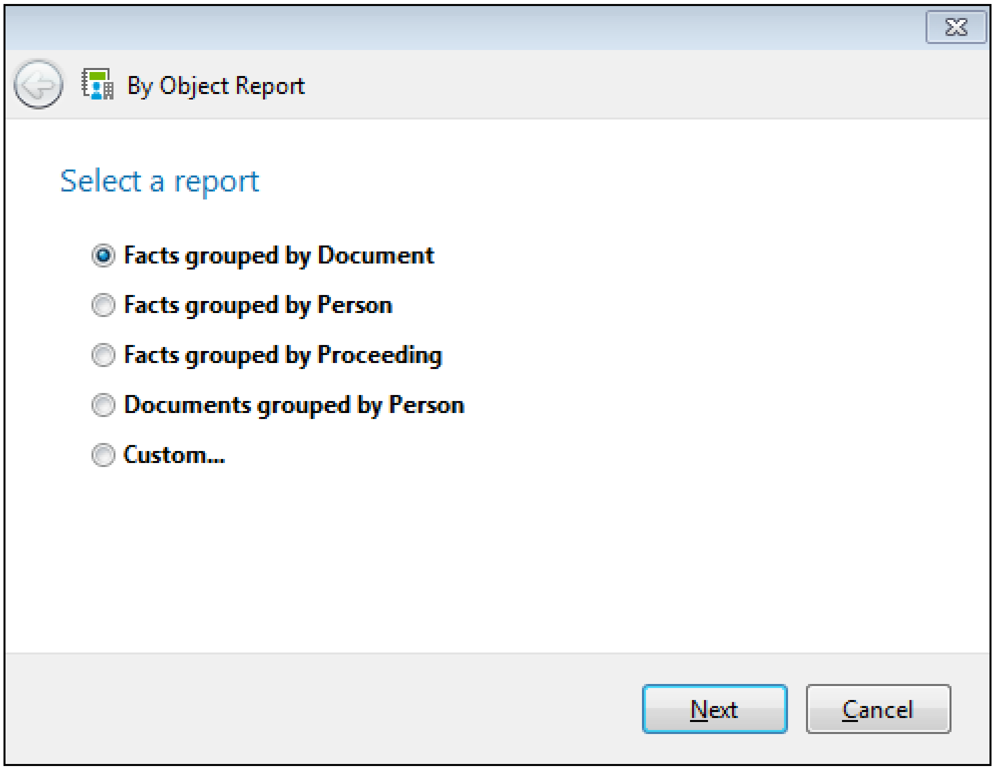
| | |
|---|---|
| **Type** | Fact Witness |
| **Description** | |
| **Linked Issues** | |

**Facts related to Randy Fosheim:**

| Date & Time | Fact Text | Source(s) | Status | Linked Issues |
|---|---|---|---|---|
| Mon 07/04/2005 | Philip Hawkins allegedly makes derogatory remarks about Linda Collins to Karen Thomas during Anstar Biotech Industries Fourth of July picnic. Randy Fosheim in attendance. | InterviewNotes | Disputed by: Opposition | Deserved Termination |

### To create a By Objects Report

1. On the **Reports** menu, click **By Object**.
2. In the **Select a Report** dialog box, select a report type, and then click **Next**.



By Object Report

Select a report

● Facts grouped by Document
○ Facts grouped by Person
○ Facts grouped by Proceeding
○ Documents grouped by Person
○ Custom...

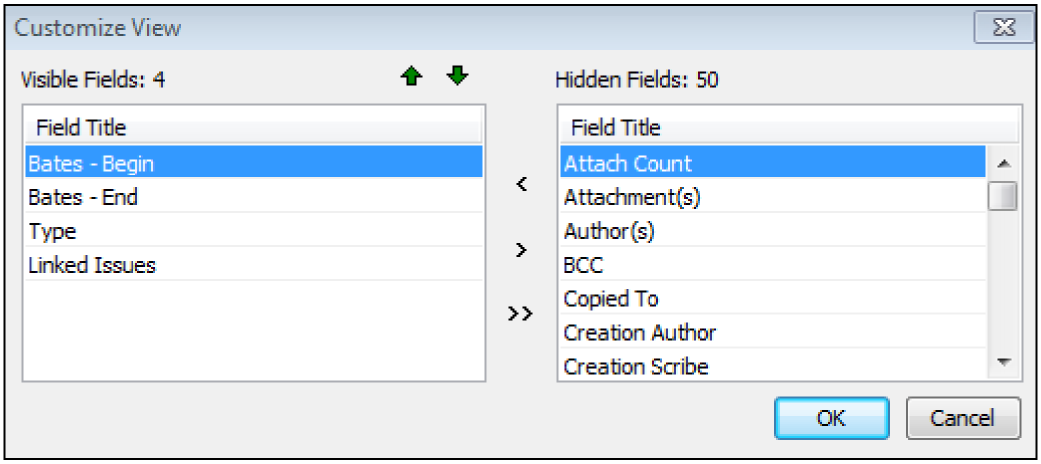
If you select Custom, you can then select the object spreadsheet you want to use and whether to include objects with or without links.

3. In the **Do you want to customize the fields shown in the report** dialog box, select one of the following:
   - No, I want the report to use CaseMap's default options
   - Yes, I want to customize the report fields
4. Perform one of the following:

   If you clicked No, click Next and then select output format. Click **Next** and then click **Finish** to print the report.

   If you clicked Yes, click **Next** to continue.
5. In the **Do you want to include any additional Object 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.


Customize View
Visible Fields: 4
Field Title
Bates - Begin
Bates - End
Type
Linked Issues
<
>
>>
Hidden Fields: 50
Field Title
Attach Count
Attachment(s)
Author(s)
BCC
Copied To
Creation Author
Creation Scribe
OK
Cancel

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

Use the Move Up and Move Down buttons ⬆ ⬇ to organize the viewing order for the report.

6. Click **Next** to continue.

7. In the **What fields do you want to show in the report page** dialog box, select whether to show the fields in the current spreadsheet view or only those displayed in the **Selected** fields box.

   Click Customize to add or organize the fields to suit your needs, then click OK.

8. In the **What format do you want to use for this report** dialog box, select output format, then click **Next**.

9. Click **Finish** to print the report.

   Notice that all facts or documents are grouped by the objects selection specified, and are displayed in separate tables for each object.

   You can now save the report as a Word file or PDF file, and save the it in the network folder where you store reports.

Related Topics

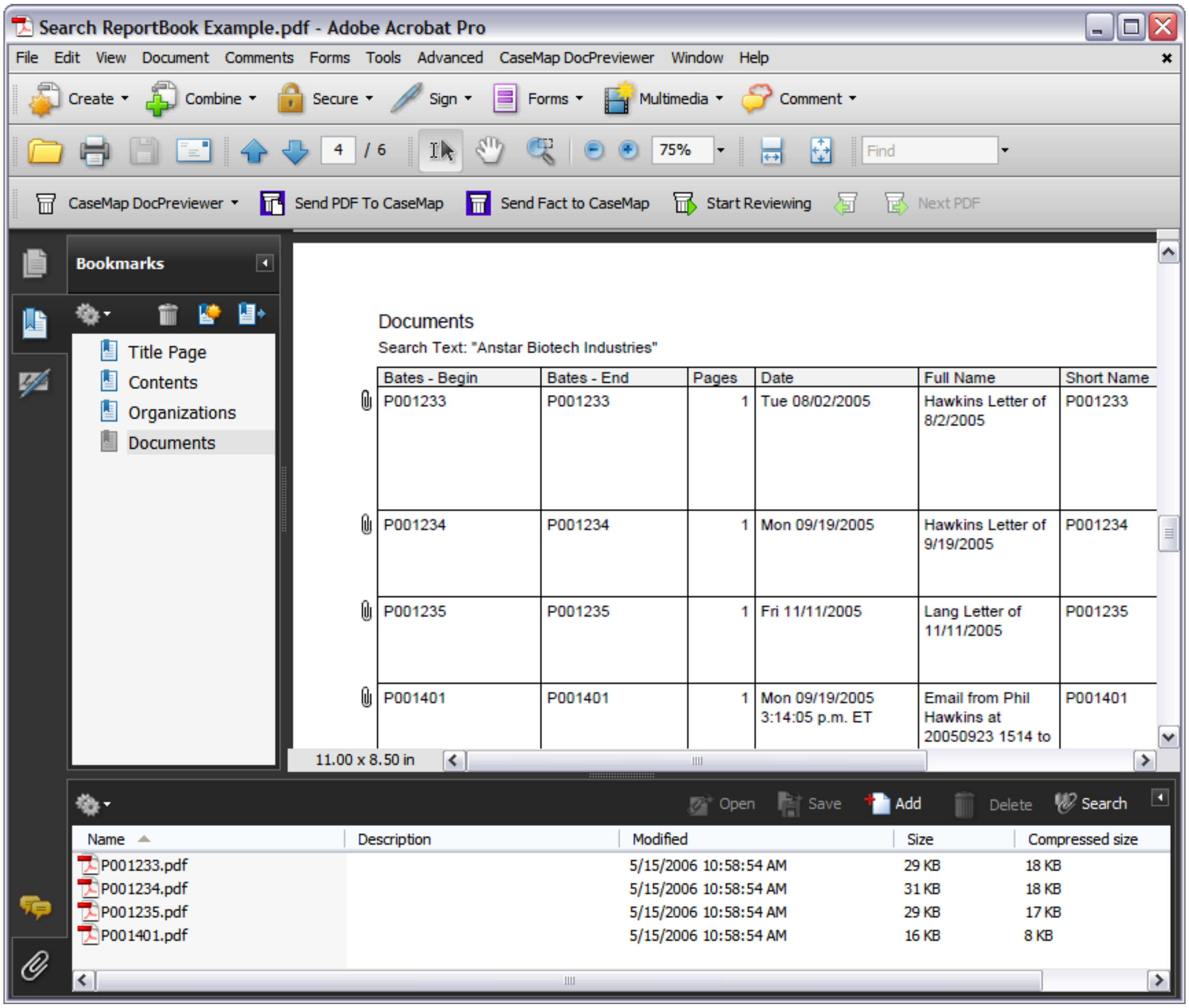
[About creating reports]

[About printing]

## Processing Search Results

### *Sending Search Results to a ReportBook*

You can send search results to a Search ReportBook, which creates a report for each spreadsheet record and all linked files returned by a search. The Search ReportBook embeds the linked files in the PDF report, allowing you and others to view the documents without having to open the case in CaseMap. The ReportBook prints the search query at the top left of each page.


Search ReportBook Example.pdf - Adobe Acrobat Pro
File Edit View Document Comments Forms Tools Advanced CaseMap DocPreviewer Window Help
Create Combine Secure Sign Forms Multimedia Comment
4 / 6
75%
Find
CaseMap DocPreviewer Send PDF To CaseMap Send Fact to CaseMap Start Reviewing Next PDF
Bookmarks
Title Page
Contents
Organizations
Documents
11.00 x 8.50 in
Open Save Add Delete Search

Documents

Search Text: "Anstar Biotech Industries"

| Bates - Begin | Bates - End | Pages | Date | Full Name | Short Name |
|---|---|---|---|---|---|
| P001233 | P001233 | 1 | Tue 08/02/2005 | Hawkins Letter of 8/2/2005 | P001233 |
| P001234 | P001234 | 1 | Mon 09/19/2005 | Hawkins Letter of 9/19/2005 | P001234 |
| P001235 | P001235 | 1 | Fri 11/11/2005 | Lang Letter of 11/11/2005 | P001235 |
| P001401 | P001401 | 1 | Mon 09/19/2005 3:14:05 p.m. ET | Email from Phil Hawkins at 20050923 1514 to | P001401 |

| Name | Description | Modified | Size | Compressed size |
|---|---|---|---|---|
| P001233.pdf | | 5/15/2006 10:58:54 AM | 29 KB | 18 KB |
| P001234.pdf | | 5/15/2006 10:58:54 AM | 31 KB | 18 KB |
| P001235.pdf | | 5/15/2006 10:58:54 AM | 29 KB | 17 KB |
| P001401.pdf | | 5/15/2006 10:58:54 AM | 16 KB | 8 KB |

In PDF output of the ReportBook, paperclip icons indicate links to files, which can be opened in an Attachments pane of the PDF reader. Double-clicking on a file opens the document in a new window, in its native application.

The Search ReportBook is organized by spreadsheet. CaseMap will only embed files that are in the Linked Files field in object spreadsheets or the Authority and Extracts spreadsheet or Source(s) field for the Facts spreadsheet.

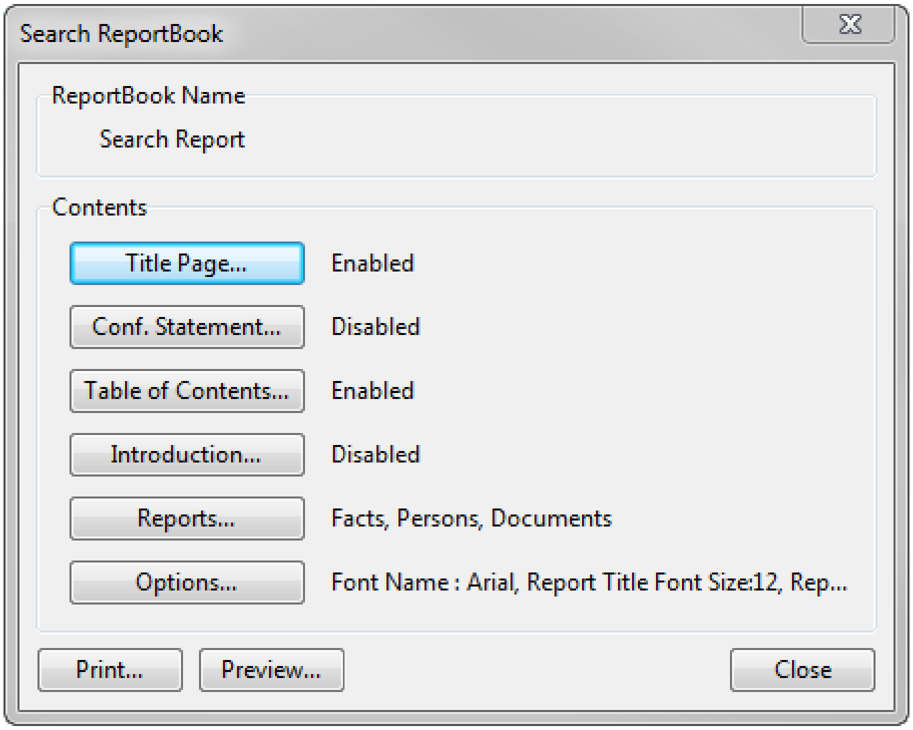
The Search ReportBook includes only those spreadsheet fields in the current view. If you have modified the spreadsheet field display order, the Search ReportBook will print the fields in your current view. However, the next time you print the Search ReportBook it will return to using a spreadsheet's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

For more information about ReportBooks, see: About ReportBooks.

For more information about embedding links in ReportBooks, see Embedding linked documents in reports.

### ⊟ To print a Search ReportBook

1. In the **Search** field, type in a search and click the **Full Text Search** button.
2. In the **Search Results** pane, click the **Search ReportBooks** link in the **Resources** pane.
3. In the **Search ReportBook** dialog box, modify the ReportBook contents as needed.



Search ReportBook

ReportBook Name

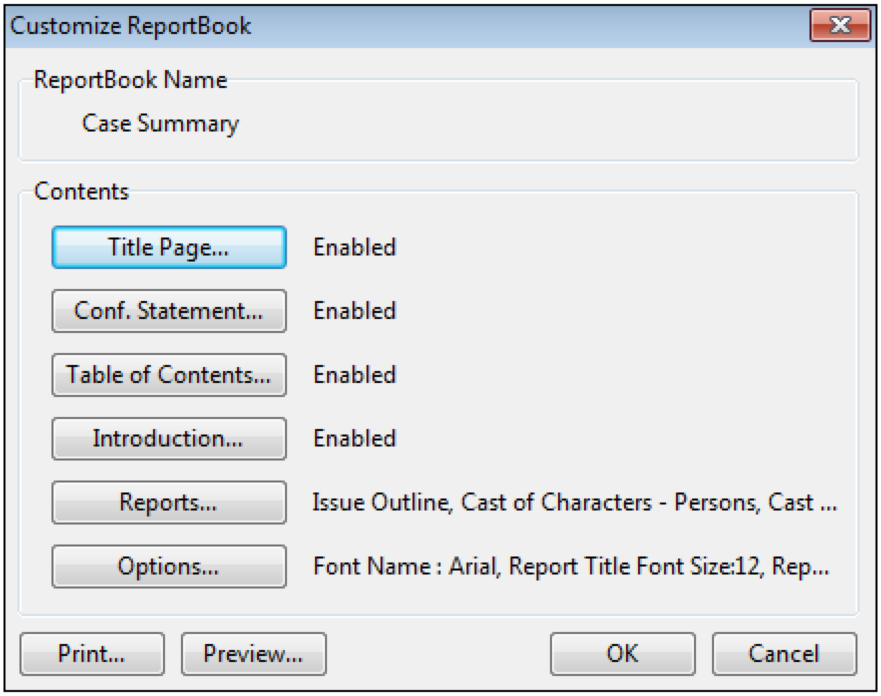
Search Report

Contents

| | |
|---|---|
| Title Page... | Enabled |
| Conf. Statement... | Disabled |
| Table of Contents... | Enabled |
| Introduction... | Disabled |
| Reports... | Facts, Persons, Documents |
| Options... | Font Name : Arial, Report Title Font Size:12, Rep... |

#### To modify the title page

1. In the **Customize ReportBook** dialog box, click on the **Title Page** button to modify content, graphics, and settings.



Case Summary

Title Page... Enabled

Conf. Statement... Enabled

Table of Contents... Enabled

Introduction... Enabled

Reports... Issue Outline, Cast of Characters - Persons, Cast ...

Options... Font Name : Arial, Report Title Font Size:12, Rep...

2. In the **Settings** area:
    - Select the **Enabled** check box to use CaseMap's default title page layouts.
    - In the **Orientation** listing, click whether you want **Portrait** or **Landscape**.
    - In the **Vertical Alignment** listing, click on the alignment option you want: **Top**, **Top Third**, **Middle**, **Bottom Third**, **Bottom**.
    - In the **Border Style** listing, click the point size for the border width.
    - In the **Border Color** listing, click the color scale you want to use.
    - Select check boxes to include **Print Date and Time**, **Print Page Number**, and **Include Graphics**.
3. Click the **Edit Content** button to modify the content that prints on each page, including typing or pasting text, modifying the font size and color, adjusting text alignment, inserting symbols or specific fields.
4. Click the **Edit Graphics** button to preview current graphics, and modify the header and footer graphic settings. You can also remove, load, and save graphics for title pages.
5. Click the **Preview** button to review changes you make before saving and printing the report.
6. Click the **Options** button to save settings as your default or to load CaseMap's default settings.

Changes to graphics affect all users and all reports in the case.

**To modify the confidentiality statement**

1. In the **Customize ReportBook** dialog box, click the **Conf. Statement** button.
2. In the **Edit ReportBook Confidentiality Statement** dialog box, select the **Enabled** check box under the Settings heading.
3. In the **Edit ReportBook Confidentiality Statement** dialog box, click the **Edit Content** button.
4. In the **Edit ReportBook Confidentiality Statement Content** window, modify text as well as font size and style, symbols, and fields using the toolbar buttons.
5. Click **OK** to save the changes.
6. In the **Edit ReportBook Confidentiality Statement** dialog box, modify additional preferences in the **Settings** area that you want applied to the confidentiality statement page.

   Settings made here only affect the confidentiality statement and not changes made to the same settings when you click the Title Page or Introduction buttons.
7. Click the **Preview** button to review your changes.
8. Click **Close** to close the preview screen.
9. Click **OK** to save the changes.
10. In the **Search ReportBook** dialog box, click **Close**.

### To modify the table of contents

1. In the **Customize ReportBook** dialog box, click the **Table of Contents** button.
2. In the **Edit ReportBook Table of Contents** dialog box, click the **Edit Content** button.
3. In the **Edit ReportBook Table of Contents Content** window, modify text as well as font size and style, symbols, and fields using the toolbar buttons.
4. Click **OK** to save the changes.
5. In the **Edit ReportBook Table of Contents** dialog box, modify additional preferences in the **Settings** area that you want applied to the table of contents page.

   Settings made here only affect the table of contents page and not changes made to the same settings when you click the Title Page or Conf. Statement buttons.
6. Click the **Preview** button to review your changes.
7. Click **OK** to save the changes.

### To modify the introduction

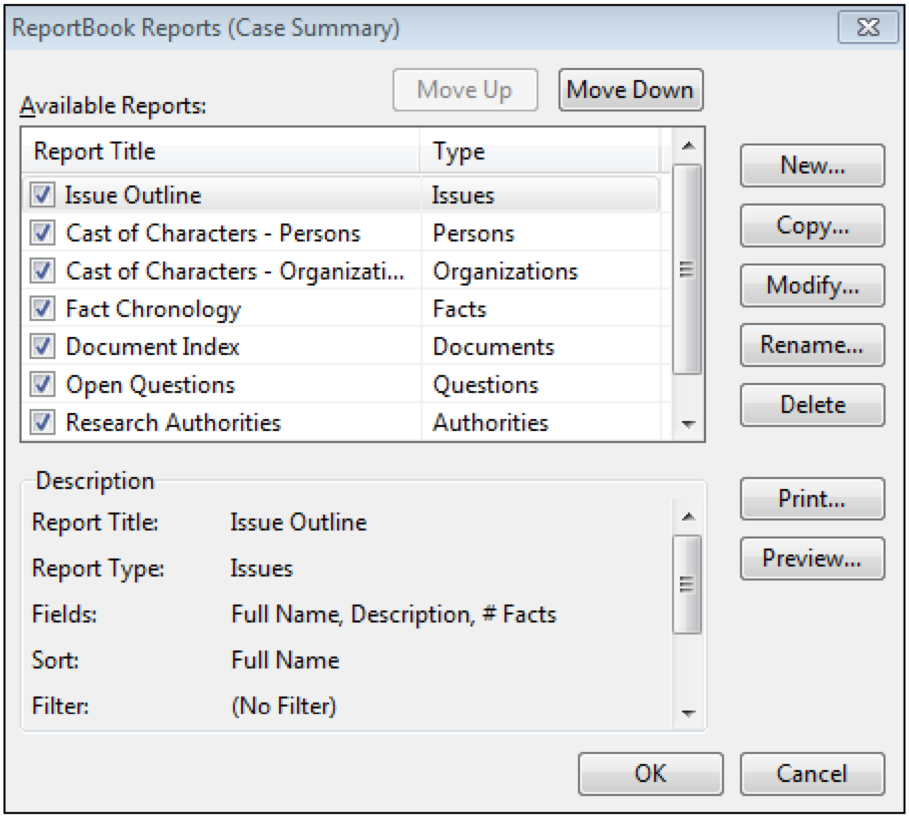
1. In the **Customize ReportBook** dialog box, click the **Introduction** button.
2. In the **Edit ReportBook Confidentiality Introduction** dialog box, select the **Enabled** check box under the **Settings** heading.

3. In the **Edit ReportBook Introduction** dialog box, click the **Edit Content** button.
4. In the **Edit ReportBook Introduction Content** window, modify text as well as font size and style, symbols, and fields using the toolbar buttons.
5. Click **OK** to save the changes.
6. In the **Edit ReportBook Introduction** dialog box, modify additional preferences in the **Settings** area that you want applied to the introduction page.

   Settings made here only affect the introduction page and not changes made to the same settings when you click the Title Page or Conf. Statement buttons.
7. Click the **Preview** button to review your changes.
8. 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.



| Report Title | Type |
|---|---|
| ☑ Issue Outline | Issues |
| ☑ Cast of Characters - Persons | Persons |
| ☑ Cast of Characters - Organizati... | Organizations |
| ☑ Fact Chronology | Facts |
| ☑ Document Index | Documents |
| ☑ Open Questions | Questions |
| ☑ Research Authorities | Authorities |

Description

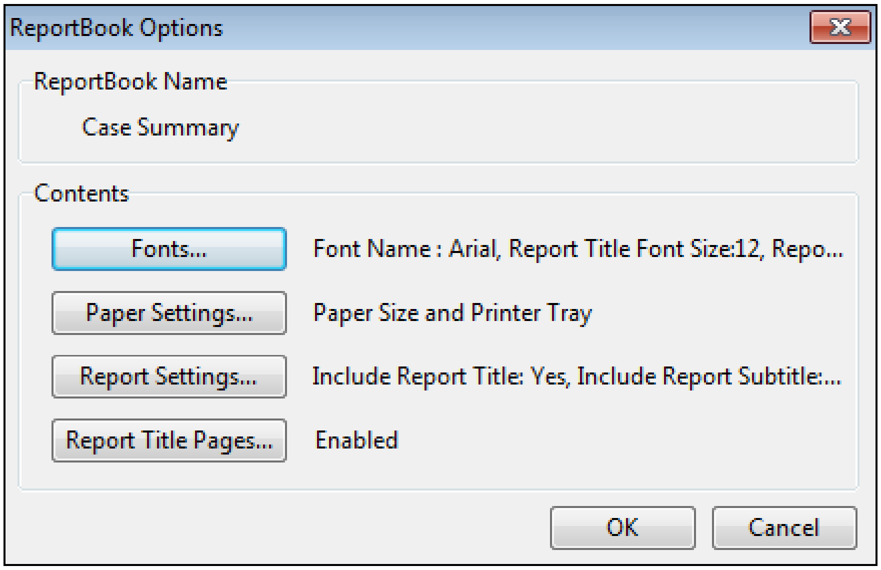
| | |
|---|---|
| Report Title: | Issue Outline |
| Report Type: | Issues |
| Fields: | Full Name, Description, # Facts |
| Sort: | Full Name |
| Filter: | (No Filter) |

To modify or edit a report within a ReportBook, click the Modify button to change fields, sort order, filters, groups, and print options for the report. Click the Rename button to change the report name within the ReportBook.

3. Click **OK** to save the changes.

### To modify options

1. In the **Customize ReportBook** dialog box, click the **Options** button.
2. In the **ReportBook Options** dialog box, review the name in the **ReportBook Name** area.


ReportBook Options

ReportBook Name

Case Summary

Contents

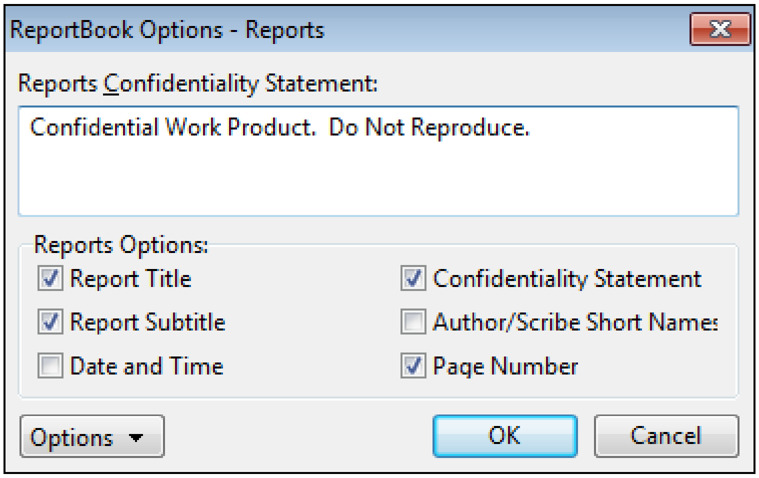
Fonts... Font Name : Arial, Report Title Font Size:12, Repo...

Paper Settings... Paper Size and Printer Tray

Report Settings... Include Report Title: Yes, Include Report Subtitle:...

Report Title Pages... Enabled

3. In the **Contents** area, click the **Fonts** button to modify the font type and size for the title page and body content, then click **OK**.
4. Click the **Paper Settings** button to select the paper size and printer tray, then click **OK**.
5. Click the **Report Settings** button to review the report confidentiality statement and select or clear check boxes to include a report title, subtitle, date and time, confidentiality statement, author/scribe short names, and page numbers.



Reports Confidentiality Statement:
Confidential Work Product.  Do Not Reproduce.

Reports Options:
☑ Report Title
☑ Report Subtitle
☐ Date and Time
☑ Confidentiality Statement
☐ Author/Scribe Short Names
☑ Page Number

   6. Click **OK** to save the changes.
   7. Click the **Report Title Pages** button to modify settings for the ReportBook title page, then click **OK**.
   8. In the **ReportBook Options** dialog box, click **OK** to continue.
   9. In the **Customize ReportBook** dialog box, click **OK** to save changes to all reports 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 options, then click **OK**.

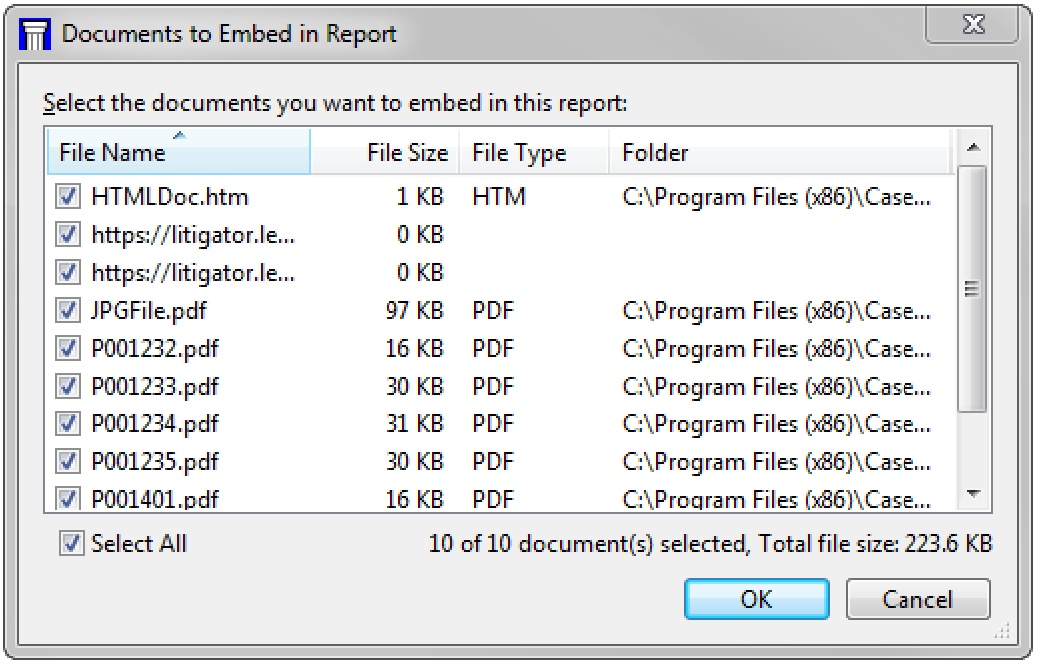
   If you print to a network printer or HTML file, linked documents will not print.

   **To print with embedded linked files**

   1. In the Search ReportBook dialog box, click the **Print** button.
   2. In the **Print** dialog box, click **PDF** in the Destination box.
   3. In the **Adobe PDF** box, click **Save As PDF**.
   4. Click **OK** to continue.
   5. In the **Save As PDF** dialog box, navigate to the folder where you want to save the report, then click **Save**.
   6. In the message box, click **Yes** to embed copies of linked documents within the PDF report.

      If you select No, the linked documents are not embedded in the report and no paperclip icons display next to spreadsheet records.

   6. In the **Documents to Embed in Report** dialog box, review the list of documents linked to the current spreadsheet's records.



Select the documents you want to embed in this report:

| File Name | File Size | File Type | Folder |
|---|---|---|---|
| ☑ HTMLDoc.htm | 1 KB | HTM | C:\Program Files (x86)\Case... |
| ☑ https://litigator.le... | 0 KB | | |
| ☑ https://litigator.le... | 0 KB | | |
| ☑ JPGFile.pdf | 97 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001232.pdf | 16 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001233.pdf | 30 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001234.pdf | 31 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001235.pdf | 30 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001401.pdf | 16 KB | PDF | C:\Program Files (x86)\Case... |

☑ Select All

10 of 10 document(s) selected, Total file size: 223.6 KB

Documents are sorted by file name.

7. Clear the check box next to any document or file you want to remove from the list.

8. Click **OK** to continue.

   A message displays if the total file size exceeds 5 MB, allowing you the option to remove some files before printing.

9. In the message box asking to view the file now, click **Yes**.

10. When the report opens in Adobe Acrobat or Reader, navigate to a report page that contains spreadsheet records.

    When a ReportBook is printed to PDF, the table of contents is hyperlinked to the relevant content section of the report.

11. Click on the **paperclip** icon next to a spreadsheet record to open the linked document.

12. In the message box asking if you would like to open the file or web site, click **OK** or **Allow**.

    The document or file opens in a new window and in its native source file application.

13. Click the **paperclip** icon in the lower, left corner of Adobe Acrobat or Reader.

    An Attachments pane displays in the bottom of the window.

14. In the **Attachments** pane, double-click on the linked document or file you want to view.

    The document opens in a new window in its native application.

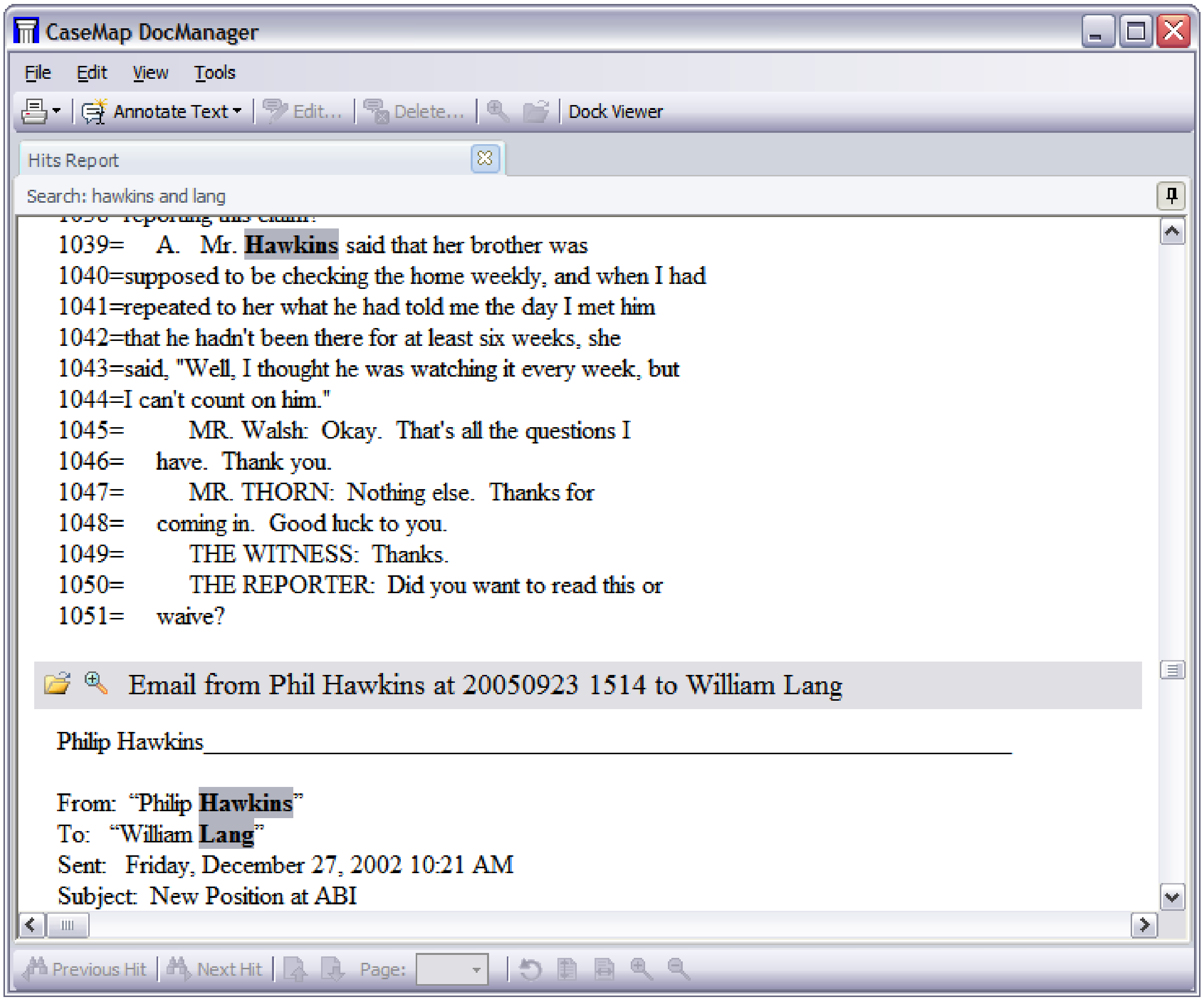
5. Click **Close** when you are finished.

Related Topics

- About ReportBooks
- About printing reports
- Embedding linked documents in reports
- About searching
- Viewing search results

### *Printing a Linked File Text Hits Report*

You can create a report that contains full-text search hits in the context of text excerpts from linked files. This is called the Linked File Text Hits Report.



1039= A. Mr. **Hawkins** said that her brother was
1040=supposed to be checking the home weekly, and when I had
1041=repeated to her what he had told me the day I met him
1042=that he hadn't been there for at least six weeks, she
1043=said, "Well, I thought he was watching it every week, but
1044=I can't count on him."
1045= MR. Walsh: Okay. That's all the questions I
1046= have. Thank you.
1047= MR. THORN: Nothing else. Thanks for
1048= coming in. Good luck to you.
1049= THE WITNESS: Thanks.
1050= THE REPORTER: Did you want to read this or
1051= waive?

Email from Phil Hawkins at 20050923 1514 to William Lang

Philip Hawkins

From: "Philip **Hawkins**"
To: "William **Lang**"
Sent: Friday, December 27, 2002 10:21 AM
Subject: New Position at ABI

Note the following about this report:

- CaseMap will also find search hits in the file metadata such as the file name and other properties of a PDF or Word document.

- The report opens in DocManager, where you can scroll to review each text excerpt in context with 12 lines of text before and after the search hit.

- Search hits print in bold and are highlighted when they display in DocManager. Gray title bars separate linked files in the report.

- While previewing the report in DocManager, you can also navigate search hits, open the file in its native application, and access the record detail associated with the file. You can also select text in the report window and copy it to the Windows Clipboard Viewer. Simply select the report text you want to copy, right-click and then click Copy. Or click the Edit menu and then click Copy.

- Before printing the report, you can preview it to ensure you are only printing the file content you want to include. Print options include standard network printers. In the printed output, search hits print with a rectangle around them. Annotations do not print in the Linked File Text Hits report.

The Linked File Text Hits report is part of the DocManager add-in program. If you have not purchased DocManager, you cannot use this feature. Contact your CaseMap account representative at 866-316-8525 or visit www.lexisnexis.com to learn more information about this product.

When using the NOT operator in a search, documents may be included in the search results that do not contain search hits.

## To print a Linked File Text Hits Report

1. In the **Search** field, type in a search and click the **Full Text Search** button.
2. In the **Search Results** pane, click the **Linked File Text Hits Report** link in the **Resources** pane.

   The report now displays in the CaseMap DocManager window with search hits highlighted.
3. In the **DocManager** window, scroll to view all linked documents printed in the **Hits Report** tab.

   Notice that linked documents are separated with gray title bars displaying the full name of the file.
4. Click the **Open File** button to view the file in its native application.
5. Click the **Record Detail** button to view or edit case record detail for the linked file.
6. On the **Reports** ribbon click **More**, and then click the **Print Preview** button to review the report before printing it.

   Notice that search hits are now outlined in a rectangle as they will appear in the printed output.
7. In the **Print Preview** window, click the x to close it and return to DocManager.
8. Click the **Print** button and then click **Print** to select your printer.
9. In the **Print** dialog box, click **Print**.
10. Click the x in the DocManager window when you are finished.

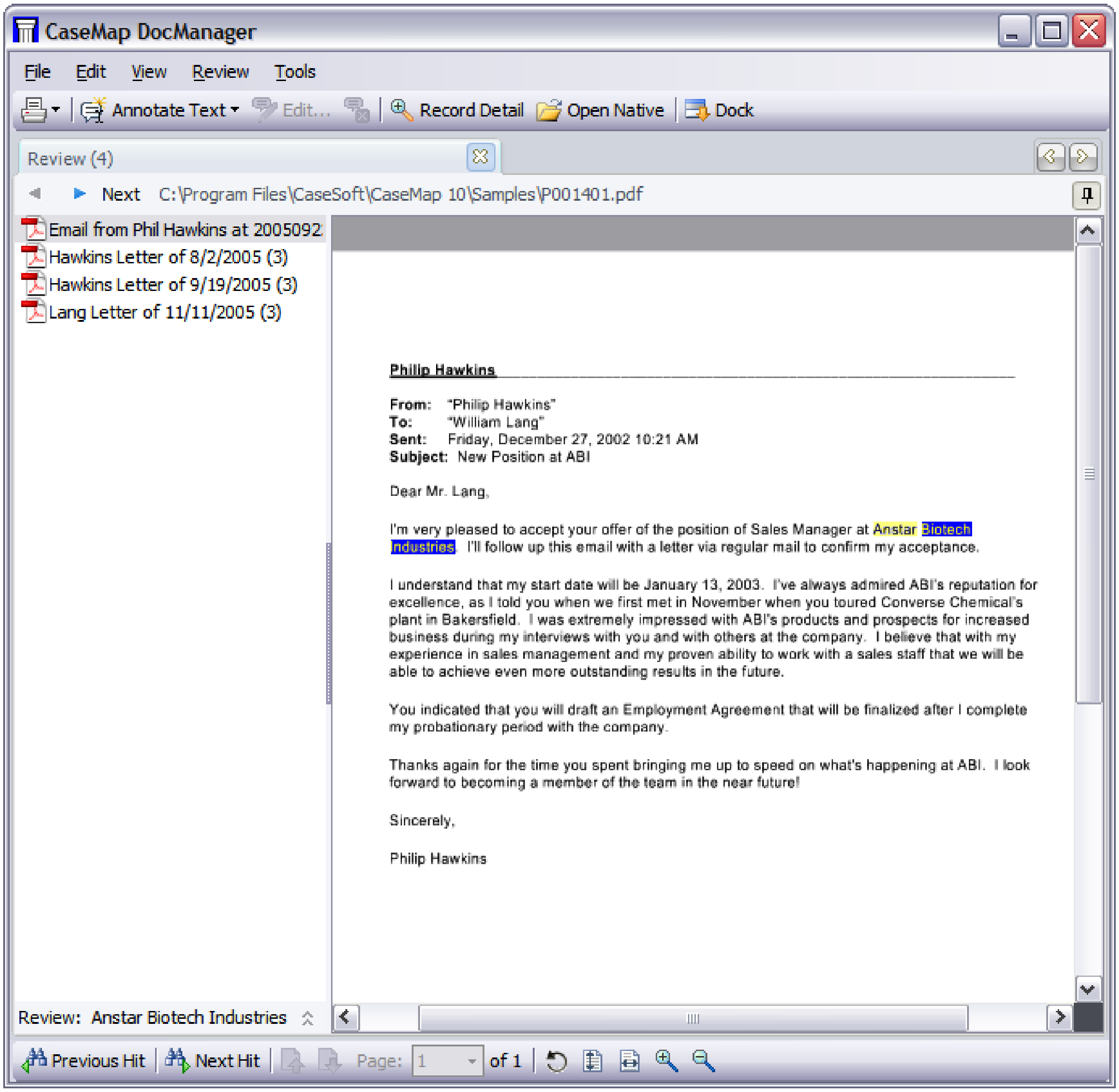
Related Topics

About DocManager
Printing a Review Linked File Hits report
Printing a Search ReportBook
About printing reports

### *Viewing a Review Linked File Hits report*

The Review Linked File Hits report contains a list of all linked files that contain search hits after a full-text search is run.

The report displays in DocManager with an Attachments pane listing the linked files. For each linked file listed an icon indicates its file type and the number of search hits displays to the right of the file name. Each linked file's folder path displays at the top of each file tab. The search query run before the report was generated displays at the bottom of the Linked Files pane.


CaseMap DocManager
File
Edit
View
Review
Tools
Annotate Text
Edit...
Record Detail
Open Native
Dock
Review (4)
Next
C:\Program Files\CaseSoft\CaseMap 10\Samples\P001401.pdf
Email from Phil Hawkins at 2005092
Hawkins Letter of 8/2/2005 (3)
Hawkins Letter of 9/19/2005 (3)
Lang Letter of 11/11/2005 (3)
Review: Anstar Biotech Industries
Previous Hit
Next Hit
Page: 1
of 1

**Philip Hawkins**

**From:** "Philip Hawkins"
**To:** "William Lang"
**Sent:** Friday, December 27, 2002 10:21 AM
**Subject:** New Position at ABI

Dear Mr. Lang,

I'm very pleased to accept your offer of the position of Sales Manager at Anstar Biotech Industries. I'll follow up this email with a letter via regular mail to confirm my acceptance.

I understand that my start date will be January 13, 2003. I've always admired ABI's reputation for excellence, as I told you when we first met in November when you toured Converse Chemical's plant in Bakersfield. I was extremely impressed with ABI's products and prospects for increased business during my interviews with you and with others at the company. I believe that with my experience in sales management and my proven ability to work with a sales staff that we will be able to achieve even more outstanding results in the future.

You indicated that you will draft an Employment Agreement that will be finalized after I complete my probationary period with the company.

Thanks again for the time you spent bringing me up to speed on what's happening at ABI. I look forward to becoming a member of the team in the near future!

Sincerely,

Philip Hawkins

The first linked file in the list automatically displays in DocManager. Search hits are highlighted in blue with the current search hit displaying in yellow. Scroll or use the navigation buttons at top of the file tab to review each file. When you navigate to the end of a linked file, a message box displays asking if you want to view the next document. You can also double-click on any linked file to open it in the DocManager window.

While previewing the report in DocManager, you can also navigate search hits, open the file in its native application, and access the record detail associated with the file. You can also select text in the report window and copy it to the Windows Clipboard Viewer. Simply select the report text you want to copy, right-click and then click Copy. Or click the Edit menu and then click Copy.

> The Review Linked File Hits report is part of the DocManager add-in program. If you have not purchased DocManager, you cannot use this feature. Contact your CaseMap account representative at 866-316-8525 or visit www.lexisnexis.com to learn more information about this product.

### ⊟ To view a Review Linked File Hits report

1. In the **Search** field, type in a search term and click the **Full Text Search** button.
2. In the **Search Results** pane, click the **Review Linked File Hits** link in the **Resources** pane.

   All linked files for the search query now display in the CaseMap DocManager in the Documents pane with the number of search hits to the right of each file name. The first file is automatically opened in DocManager.

   Notice that your search query displays at the bottom of the Linked Documents pane.
3. Navigate the search hits by clicking the **Next Hit** or **Previous Hit** buttons.

   Search hits display highlighted in blue with the current hit highlighted in yellow.
4. Click on the **Next Document** ► Next or **Previous Document** ◄ buttons to view files in report.

   You can also double-click on a file in the pane to open it in the DocManager window.
5. When you are finished click the ✕ to close the DocManager window.

Related Topics

About DocManager
Navigating documents
About printing reports

## ReportBooks

### *About ReportBooks*

A ReportBook is a compilation of multiple CaseMap reports that include configurable front-matter elements, including: cover page, table of contents, confidentiality statement, introduction, and report-specific title pages.

You can use ReportBooks for the following purposes:

- Compile your own selection of reports into a custom ReportBook.
- Help keep clients and case staff informed of case developments.
- Facilitate collaboration and information sharing.
- Provide key inputs into the case analysis process.
- Customize text and graphics on ReportBook templates.
- Preview drafts onscreen before sending, printing or saving.
- Print, save to PDF, and attach as PDF to an email.
- Retain ReportBook data with confidence because they are compiled independent from spreadsheet views.
- Share copies of files attached to case objects with people who do not have access to your CaseMap database.

All pre-built and saved ReportBooks are shared for all users in the case and available on the Reports ribbon by selecting ReportBooks. All custom ReportBooks are tracked in the Manage ReportBooks dialog box with the creation author's name and date noted.

### ⊟ ReportBooks compared to Reports

**Differences from Reports**

- A ReportBook generally consists of a compilation of several reports, with added cover page, table of contents, and separator pages. A reports are just individual reports.
- ReportBooks differ from standard reports in that they are based on standardized layouts that function independently from your spreadsheet views. Changes made to spreadsheet views do not affect ReportBook formats.
- ReportBooks are more configurable than reports, and that's by design so they can serve your purposes with more flexibility. For example, ReporBook might include an Issue Outline, a Cast of Characters, a Chronology of Key Facts, and a Document Index. Another ReportBook could feature key facts, showing date, time, fact text, and source fields, sorted by the date and time.

**Similarities to Reports**

ReportBooks and reports are similar in the following ways:

- Both are accessible from the **Reports** ribbon.
- Templates are provided for both ReportBooks and reports.
- Both ReportBooks and reports provide customization options.

### ⊟ Optional elements and page customization options

ReportBooks provide the following optional elements:

- Title page
- Confidentiality statement
- Table of contents
- Introduction
- Selection of reports to include,
- Reports may include embedded document links, which allows you to share the report and supporting files with others who do no have access to CaseMap or the case. Once a ReportBook in printed to PDF, spreadsheet records with attached files are embedded in the PDF file for viewers to access.

When you open a ReportBook in Adobe Acrobat or Reader, look for the paperclip icon in the lower left corner of the program. It indicates that a linked document is available. Double-clicking on the file in the Attachments pane opens it in a new window in its native application.

Each of these elements may be customized as follows:

- Add formatted text.
- Add graphics, for example, your company logo.
- Add CaseMap fields. Fields are designated as follows: *[[%FieldName%]]*. Fields are used in the default ReportBooks for page numbering and for other other template elements. For example, *[[%CaseName%]]* appears on the title page of pre-built ReportBooks. For the Hawkins example case, it prints as *Philip Hawkins v. Ansar Biotech Industries.*
- Configure layout options, including page orientation, borders, and more.

For more information, see Creating custom ReportBooks, Embedding linked documents in reports.

## Learning to use ReportBooks

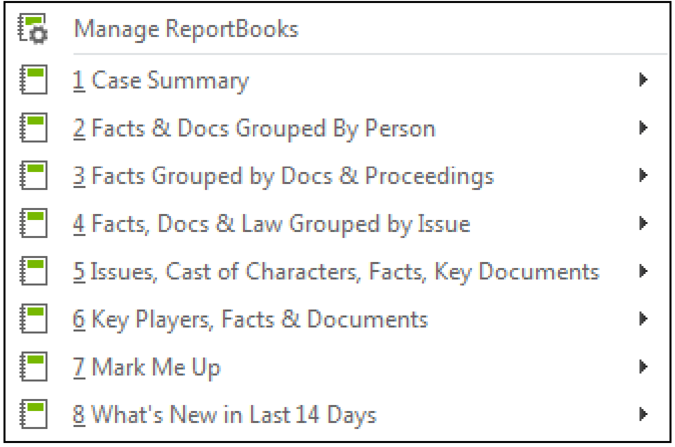
One of the best ways to learn to use ReportBooks is to experiment with customizing them using the Hawkins demo case built into CaseMap. You can refresh the case to reset data and settings as you become more adept at compiling a ReportBook layout that best meets your case needs.

- **Run and print preview the pre-built ReportBooks** — Start by running each pre-built ReportBooks and then examining the output using print preview. In this way you can familiarize yourself with default options for each ReportBook.
- **Customize options in the prebuilt reports** -- Run each prebuilt report again, this time customizing options such as
- **Open the Manage ReportBooks tool** — This feature is accessible on the **Reports** ribbon by clicking **ReportBooks** > **Manage ReportBooks**. The Manage ReportBooks tool allows you to modify or customize a new ReportBook. Here you will see the ReportBook descriptions. Clicking the Modify button grants you access to the components included in each ReportBook. Click each of these buttons to review the editing options available.

- **Practice creating custom ReportBooks** — Practice using the New ReportBook Wizard to create your own from scratch.

### ⊟ To open ReportBook templates

1. Click **Reports** then click **ReportBooks**.


Manage ReportBooks
1 Case Summary
2 Facts & Docs Grouped By Person
3 Facts Grouped by Docs & Proceedings
4 Facts, Docs & Law Grouped by Issue
5 Issues, Cast of Characters, Facts, Key Documents
6 Key Players, Facts & Documents
7 Mark Me Up
8 What's New in Last 14 Days

2. Select one of the prebuilt templates, and then click Preview to see how it will look when printed or saved, or click Customize to access customization options for the ReportBook.

When you use the Intake Interview Jumpstart form, CaseMap automatically creates a ReportBook of the imported information for you.

When you complete the import wizard, a message box indicates that the ReportBook is created and available for to preview. You can save the ReportBook to a Reports folder on your network for reference purposes.

For more information, see Printing pre-built ReportBooks.

### ⊟ ReportBooks and Intake Interview Jumpstart

When you use the Intake Interview Jumpstart form, CaseMap automatically creates a ReportBook of the imported information for you.

For more information, Importing the Intake Interview Form.

### ⊟ Adjust spreadsheet views before creating/printing ReportBooks

Before creating a custom ReportBook, first arrange your spreadsheet fields in the order you want them to display in the report and insert/hide any fields, as needed. You may also want to run a filter on a spreadsheet to remove records or data that you do not want to include.

For more information, see Creating custom ReportBooks.

Once your spreadsheet view is adjusted for the ReportBook layout, use the Create Report from Current View template. By using this utility, the new ReportBook is generated off the spreadsheet view you organized so you can customize it.

> Changes made to the case after creating the ReportBook will not be reflected in the a saved ReportBook file.

Related Topics

- [About creating ReportBooks]
- [Printing pre-built ReportBooks]
- [Creating custom ReportBooks]
- [Embedding linked documents in reports]
- [Managing ReportBooks]
- [Exporting/importing ReportBooks]

### *Creating custom ReportBooks*

Given the pre-built selections available, you may find there is no need to create your own ReportBook. If you do want to define you own ReportBook layouts, you can simply create one from scratch or by copying an existing ReportBook template and modifying it to suit your needs. Both options are available on the Reports ribbon by clicking ReportBooks and then clicking Manage ReportBooks.

Each custom ReportBook must contain at least one report. Once the ReportBook is created you can add more reports, delete, rename, modify, copy, and adjust the order of the reports included in it. All ReportBooks created in the case display in the Manage ReportBooks dialog box with the date and user name who created them. All ReportBooks are available for use by all users in the case.

#### *Custom ReportBooks can be created in following ways:*

- Copy and modify a pre-existing ReportBook
- Add a report from a pre-existing ReportBook to another ReportBook
- Add a custom report to a pre-existing ReportBook
- Create a custom ReportBook

If you have a custom ReportBook template you want to add to another case, you can export a copy of it and then import it into the other case.

#### ⊟ To copy a pre-existing ReportBook

1. On the **Reports** menu, click **ReportBooks** and then click **Manage ReportBooks**.

2. In the **Manage ReportBooks** dialog box, click the ReportBook you want to copy in the **Available ReportBooks** box.

3. Click the **Copy** button.

   Notice that a copy of the selected ReportBook now displays in the Available ReportBooks box with "Copy of" in the title.

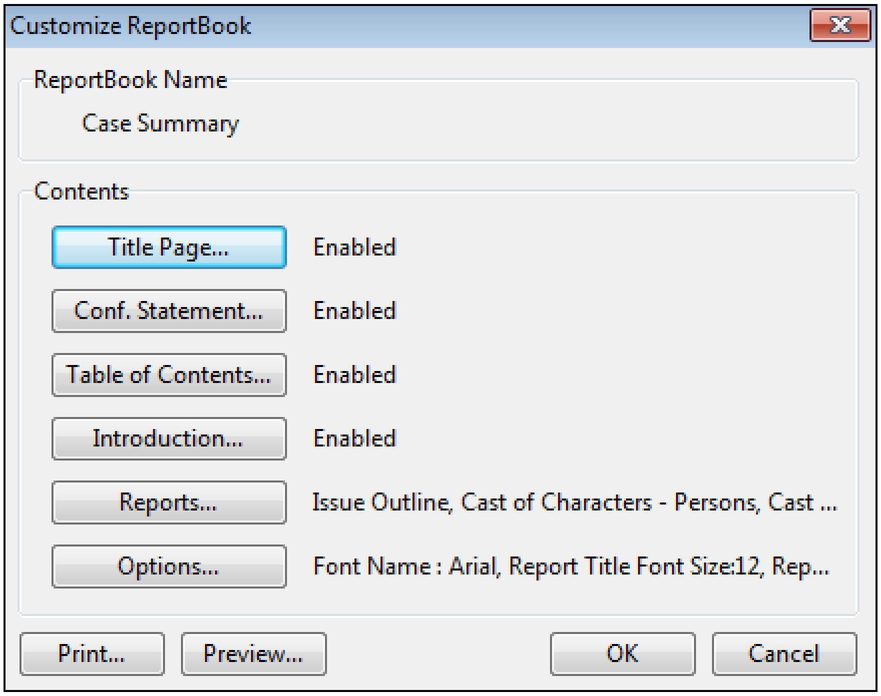
   You can now rename the ReportBook and modify it, as needed, to create a customized ReportBook.

### ⊟ To modify a pre-existing ReportBook

1. On the **Reports** menu, click **ReportBooks** and then click **Manage ReportBooks**.
2. In the **Manage ReportBooks** dialog box, click on the ReportBook you want to modify in the **Available ReportBooks** box.
3. Click the **Modify** button.

### To modify the title page

1. In the **Customize ReportBook** dialog box, click on the **Title Page** button to modify content, graphics, and settings.


Customize ReportBook
ReportBook Name
Case Summary
Contents
Title Page...
Enabled
Conf. Statement...
Enabled
Table of Contents...
Enabled
Introduction...
Enabled
Reports...
Issue Outline, Cast of Characters - Persons, Cast ...
Options...
Font Name : Arial, Report Title Font Size:12, Rep...
Print...
Preview...
OK
Cancel

2. In the **Settings** area:
   - Select the **Enabled** check box to use CaseMap's default title page layouts.
   - In the **Orientation** listing, click whether you want **Portrait** or **Landscape**.
   - In the **Vertical Alignment** listing, click on the alignment option you want: **Top**, **Top Third**, **Middle**, **Bottom Third**, **Bottom**.
   - In the **Border Style** listing, click the point size for the border width.
   - In the **Border Color** listing, click the color scale you want to use.
   - Select check boxes to include **Print Date and Time**, **Print Page Number**, and **Include Graphics**.
3. Click the **Edit Content** button to modify the content that prints on each page, including typing or pasting text, modifying the font size and color, adjusting text alignment, inserting symbols or specific fields.
4. Click the **Edit Graphics** button to preview current graphics, and modify the header and footer graphic settings. You can also remove, load, and save graphics for title

pages.

5. Click the **Preview** button to review changes you make before saving and printing the report.

6. Click the **Options** button to save settings as your default or to load CaseMap's default settings.

Changes to graphics affect all users and all reports in the case.

### To modify the confidentiality statement

1. In the **Customize ReportBook** dialog box, click the **Conf. Statement** button.

2. In the **Edit ReportBook Confidentiality Statement** dialog box, click the **Edit Content** button.

3. In the **Edit ReportBook Confidentiality Statement Content** window, modify text as well as font size and style, symbols, and fields using the toolbar buttons.

4. Click **OK** to save the changes.

5. In the **Edit ReportBook Confidentiality Statement** dialog box, modify additional preferences in the **Settings** area that you want applied to the confidentiality statement page.

   Settings made here only affect the confidentiality statement and not changes made to the same settings when you click the Title Page or Introduction buttons.

   For more information on each setting, see Step 4.

6. Click the **Preview** button to review your changes.

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

### To modify the table of contents

1. In the **Customize ReportBook** dialog box, click the **Table of Contents** button.

2. In the **Edit ReportBook Table of Contents** dialog box, click the **Edit Content** button.

3. In the **Edit ReportBook Table of Contents Content** window, modify text as well as font size and style, symbols, and fields using the toolbar buttons.

4. Click **OK** to save the changes.

5. In the **Edit ReportBook Table of Contents** dialog box, modify additional preferences in the **Settings** area that you want applied to the table of contents page.

   Settings made here only affect the table of contents page and not changes made to the same settings when you click the Title Page or Conf. Statement buttons.

   For more information on each setting, see Step 4.

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

### To modify the introduction

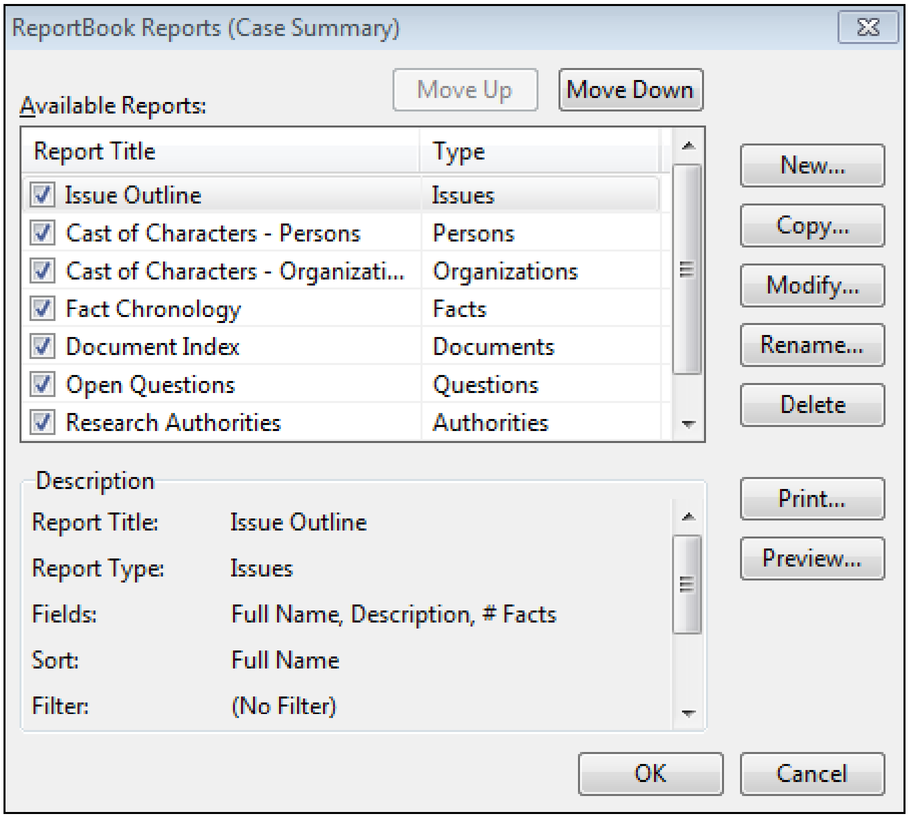
1. In the **Customize ReportBook** dialog box, click the **Introduction** button.
2. In the **Edit ReportBook Introduction** dialog box, click the **Edit Content** button.
3. In the **Edit ReportBook Introduction Content** window, modify text as well as font size and style, symbols, and fields using the toolbar buttons.
4. Click **OK** to save the changes.
5. In the **Edit ReportBook Introduction** dialog box, modify additional preferences in the **Settings** area that you want applied to the introduction page.

   Settings made here only affect the introduction page and not changes made to the same settings when you click the Title Page or Conf. Statement buttons.

   For more information on each setting, see Step 4.
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.


ReportBook Reports (Case Summary)
Available Reports:
Move Up
Move Down
New...
Copy...
Modify...
Rename...
Delete
Description
Print...
Preview...
OK
Cancel

| Report Title | Type |
|---|---|
| ☑ Issue Outline | Issues |
| ☑ Cast of Characters - Persons | Persons |
| ☑ Cast of Characters - Organizati... | Organizations |
| ☑ Fact Chronology | Facts |
| ☑ Document Index | Documents |
| ☑ Open Questions | Questions |
| ☑ Research Authorities | Authorities |

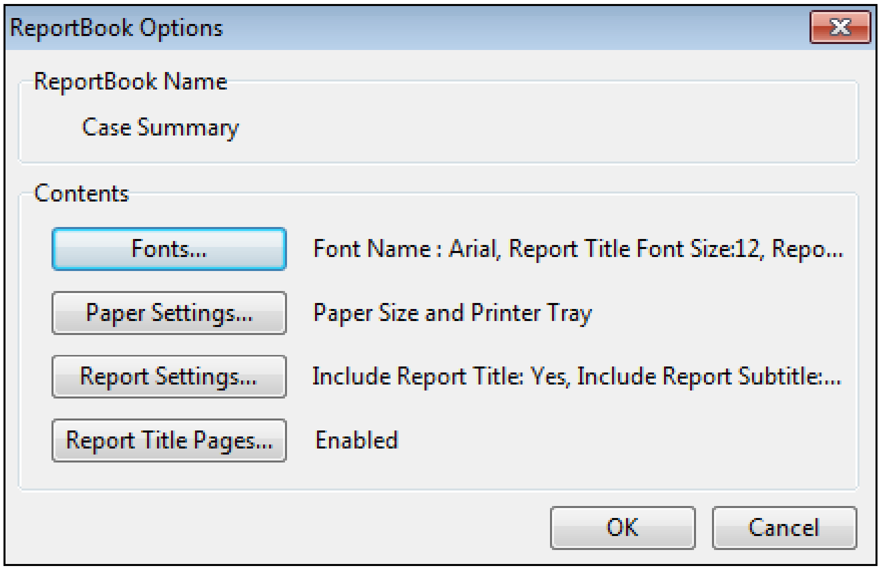
Report Title: Issue Outline
Report Type: Issues
Fields: Full Name, Description, # Facts
Sort: Full Name
Filter: (No Filter)

To modify or edit a report within a ReportBook, click the Modify button to change fields, sort order, filters, groups, and print options for the report. Click the Rename button to change the report name within the ReportBook.

3. Click **OK** to save the changes.

### To modify options

1. In the **Customize ReportBook** dialog box, click the **Options** button.
2. In the **ReportBook Options** dialog box, review the name in the **ReportBook Name** area.


ReportBook Options

ReportBook Name

Case Summary

Contents

Fonts... Font Name : Arial, Report Title Font Size:12, Repo...

Paper Settings... Paper Size and Printer Tray

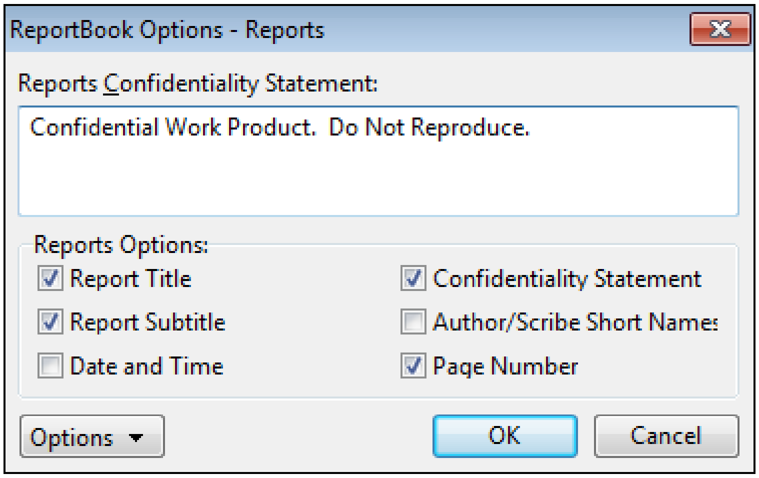
Report Settings... Include Report Title: Yes, Include Report Subtitle:...

Report Title Pages... Enabled

3. In the **Contents** area, click the **Fonts** button to modify the font type and size for the title page and body content, then click **OK**.

4. Click the **Paper Settings** button to select the paper size and printer tray, then click **OK**.

5. Click the **Report Settings** button to review the report confidentiality statement and select or clear check boxes to include a report title, subtitle, date and time, confidentiality statement, author/scribe short names, and page numbers.


ReportBook Options - Reports

Reports Confidentiality Statement:

Confidential Work Product. Do Not Reproduce.

Reports Options:

☑ Report Title
☑ Report Subtitle
☐ Date and Time
☑ Confidentiality Statement
☐ Author/Scribe Short Names
☑ Page Number

6. Click **OK** to save the changes.

7. Click the **Report Title Pages** button to modify settings for the ReportBook title page, then click **OK**.

   For more information on these settings, see Step 4.

8. In the **ReportBook Options** dialog box, click **OK** to continue.

9. In the **Customize ReportBook** dialog box, click **OK** to save changes to all reports within the ReportBook.

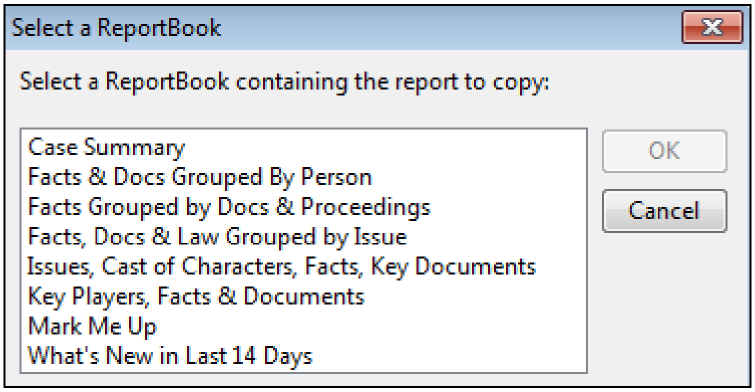
10. In the **Manage ReportBooks** dialog box, click **Close** when you are finished modifying this ReportBook.

### To add a report from a pre-existing ReportBook to another ReportBook

1. On the **Reports** menu, click **Tools**, and then click **Create Report from Existing ReportBook**.

2. In the message box, click **OK** to continue.

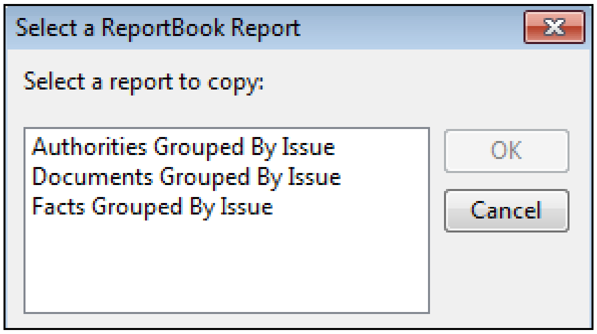
3. In the **Select a ReportBook** dialog box, select the ReportBook that contains the report you want to copy, then click **OK**.



Select a ReportBook containing the report to copy:

Case Summary
Facts & Docs Grouped By Person
Facts Grouped by Docs & Proceedings
Facts, Docs & Law Grouped by Issue
Issues, Cast of Characters, Facts, Key Documents
Key Players, Facts & Documents
Mark Me Up
What's New in Last 14 Days

5. In the Select a **ReportBook Report** dialog box, select the report you want, then click **OK**.



Select a report to copy:

Authorities Grouped By Issue
Documents Grouped By Issue
Facts Grouped By Issue

6. In the **Select a ReportBook** dialog box, select the ReportBook you want to copy the report into, then click **OK**.

7. In the **New ReportBook Report** dialog box, use the **Move Up** and **Move Down** buttons to organize the new report in the ReportBook, then click **OK**.

8. In the message box confirming the new report addition, click **OK**.

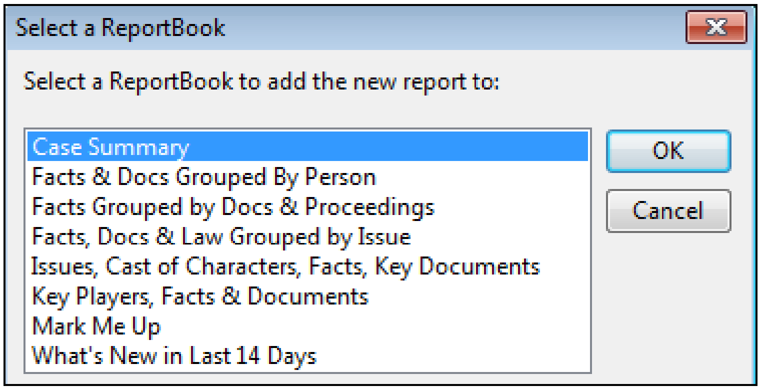
### To add a custom report to a pre-existing ReportBook

Before creating a custom report to add to a pre-existing ReportBook, first arrange your spreadsheet fields in the order you want them to display in the report and insert/hide any fields, as needed. You may also want to run a filter on a spreadsheet to remove records or data that you do not want to include.

Once your spreadsheet view is adjusted for the report layout, use the Create Report from Current View template. By using this utility, the ReportBook is generated with the new report added in your selected order. When other case staff print this ReportBook, the new report is automatically included in it for their use too.

When creating a report from the Create Report from Current View utility, CaseMap is making a one-time snapshot of the spreadsheet view to create the report. Any changes made to the spreadsheet after using this tool do not impact the ReportBook report you just created.

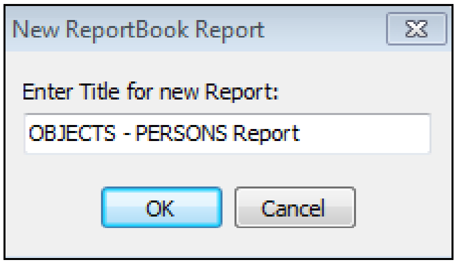
1. In the **Case Shortcuts** pane, click on the icon for the spreadsheet you want to use.
2. Arrange the spreadsheet in the view you want and filter any records as needed.
3. On the **Reports** menu, click **Tools,** and then click **Create ReportBook from Current View**.
4. In the message box, click **OK**.
5. In the **Select a ReportBook** dialog box, click on the ReportBook you want to use and click **OK**.



Select a ReportBook to add the new report to:

- Case Summary
- Facts & Docs Grouped By Person
- Facts Grouped by Docs & Proceedings
- Facts, Docs & Law Grouped by Issue
- Issues, Cast of Characters, Facts, Key Documents
- Key Players, Facts & Documents
- Mark Me Up
- What's New in Last 14 Days

7. In the **New ReportBook Report** dialog box, type in a title for the new report, then click **OK**.



Enter Title for new Report: OBJECTS - PERSONS Report

8. Click the **Move Up** or **Move Down** buttons to arrange the print order for this report within the ReportBook, then click **OK**.

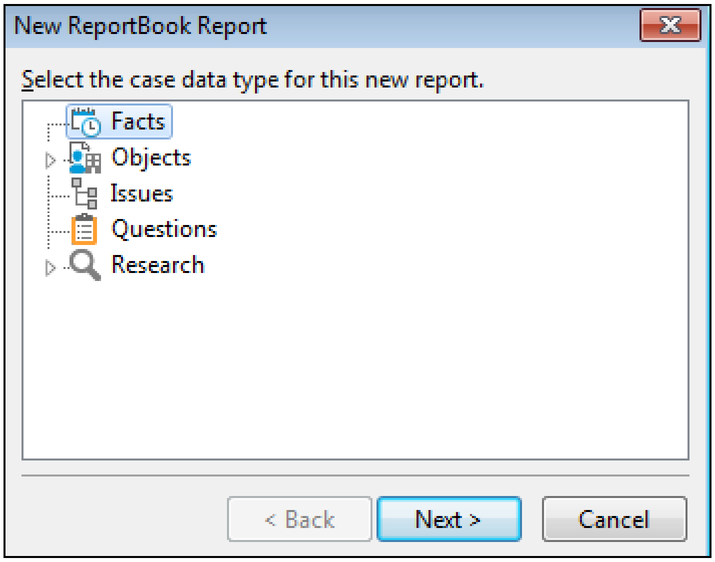
9. In the message box indicating that the ReportBook is saved, click **OK**.
10. To preview the ReportBook, click the **Reports** menu and then click **ReportBooks**.
11. Click the ReportBook you selected in the utility and then click **Preview**.
12. When the new report is generated, navigate to the **ReportBook Contents** page to locate the new report that you added.

    You can now print the report using the method that suits your needs.

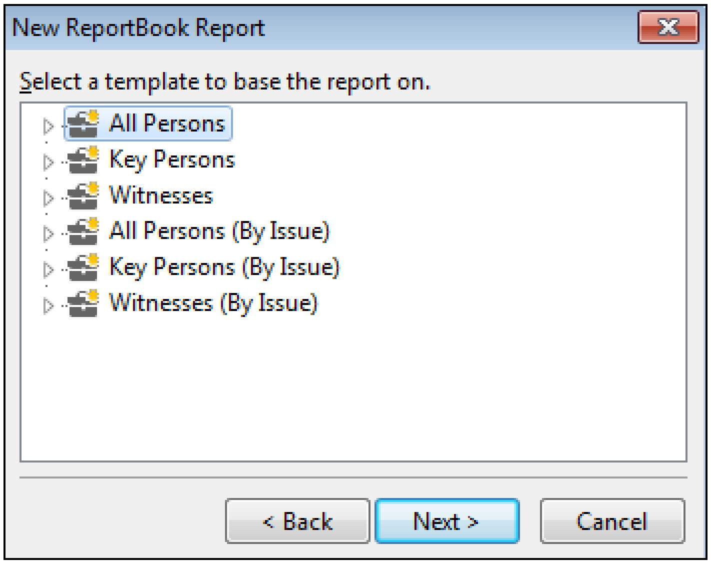
    For more information, see Printing pre-built ReportBooks.

### ⊟ To create a new custom ReportBook

1. On the **Reports** menu, click **ReportBooks** and then click **Manage ReportBooks**.
2. In the **Manage ReportBooks** dialog box, click the **New** button to open the ReportBook utility.
3. In the **Add Report(s) to the ReportBook** dialog box, click the **Click here to Add a Report** button.
4. In the **New ReportBook Report** dialog box, select the case data type for this report, then click **Next**.


New ReportBook Report
Select the case data type for this new report.
Facts
Objects
Issues
Questions
Research
< Back
Next >
Cancel

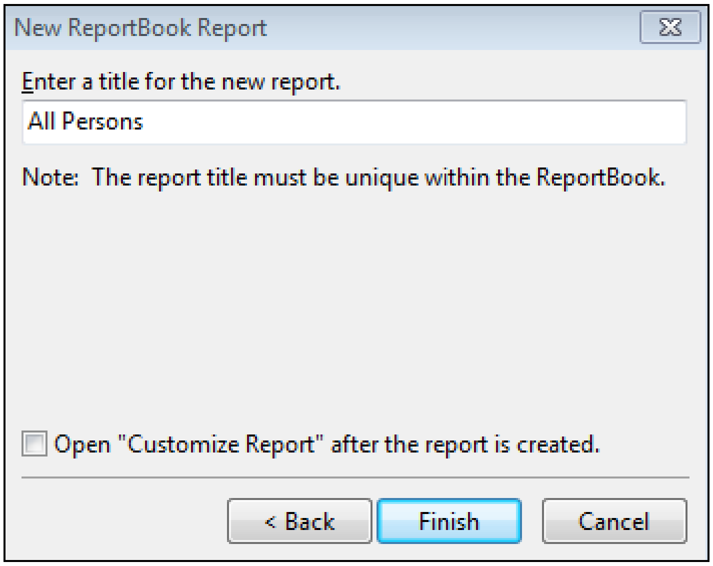
5. In the **New ReportBook Report** dialog box, select the template you want to use and expand the listing by clicking the right-arrow ▷.


New ReportBook Report
Select a template to base the report on.
All Persons
Key Persons
Witnesses
All Persons (By Issue)
Key Persons (By Issue)
Witnesses (By Issue)
< Back
Next >
Cancel

6. Click the ▷ to expand the template listing and make additional specifications, such as filtering aspects of this report, selecting specific fields, adjusting the sort order, and more, then click **Next**.

7. In the **New ReportBook Report** dialog box, expand the selections as appropriate, select a template, and click **Next** to continue.

8. Type in a name for the report.


New ReportBook Report
< Back
Finish
Cancel

Enter a title for the new report.

All Persons

Note: The report title must be unique within the ReportBook.

☐ Open "Customize Report" after the report is created.

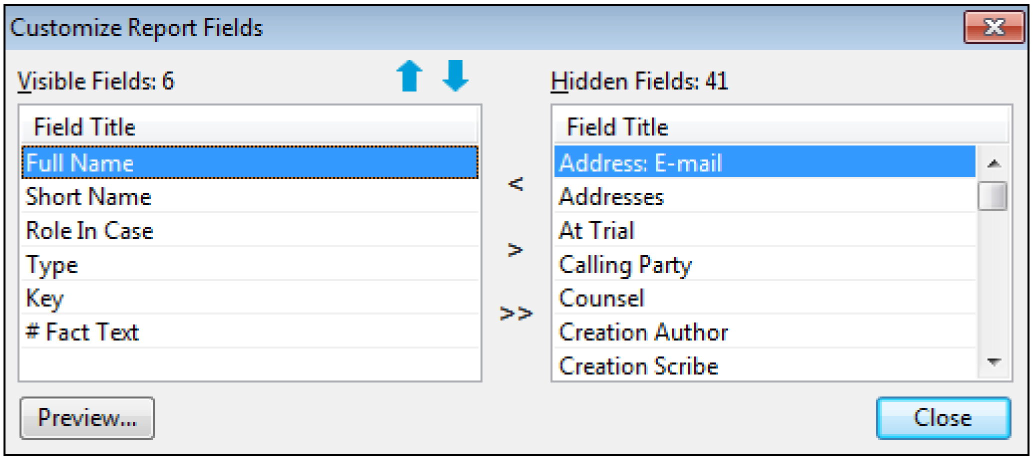
9. Select **Open "Customize Report"** after the report is created to preview the report later.

10. Click **Finish** to continue.

11. In the **Edit Report** dialog box, click the **Fields** button to add/remove fields.

12. In the **Customize Report Fields** dialog box, add or remove fields from in the **Visible Fields** box and organize the field order by clicking the **Move Up** and **Move Down** buttons

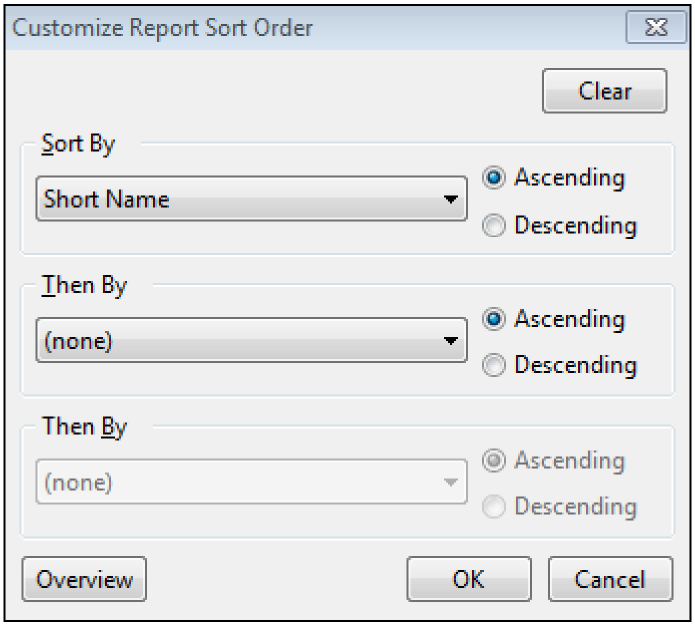
, as needed.


Customize Report Fields
Visible Fields: 6
Hidden Fields: 41
Field Title
Full Name
Short Name
Role In Case
Type
Key
# Fact Text
Field Title
Address: E-mail
Addresses
At Trial
Calling Party
Counsel
Creation Author
Creation Scribe
<
>
>>
Preview...
Close

13. Click **Close** to continue.

14. **To adjust the sort order of fields**

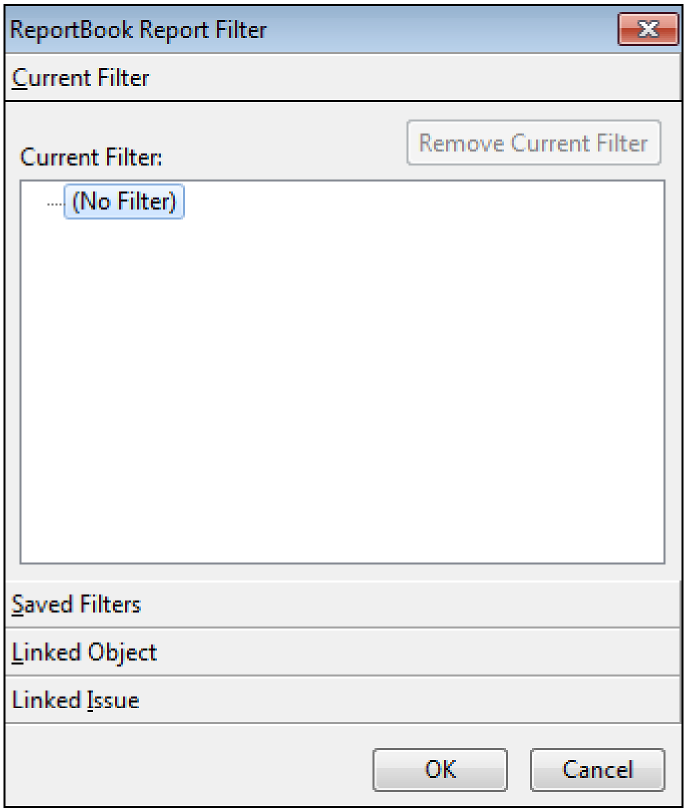
    In the **Edit Report** dialog box, click on the **Sort Order** button to sort the spreadsheet data in a specific order, then click **OK**.


Customize Report Sort Order
Clear
Sort By
Short Name
● Ascending
○ Descending
Then By
(none)
● Ascending
○ Descending
Then By
(none)
● Ascending
○ Descending
Overview
OK
Cancel

    For more information, see Sorting multiple fields.

15. **To add a filter**

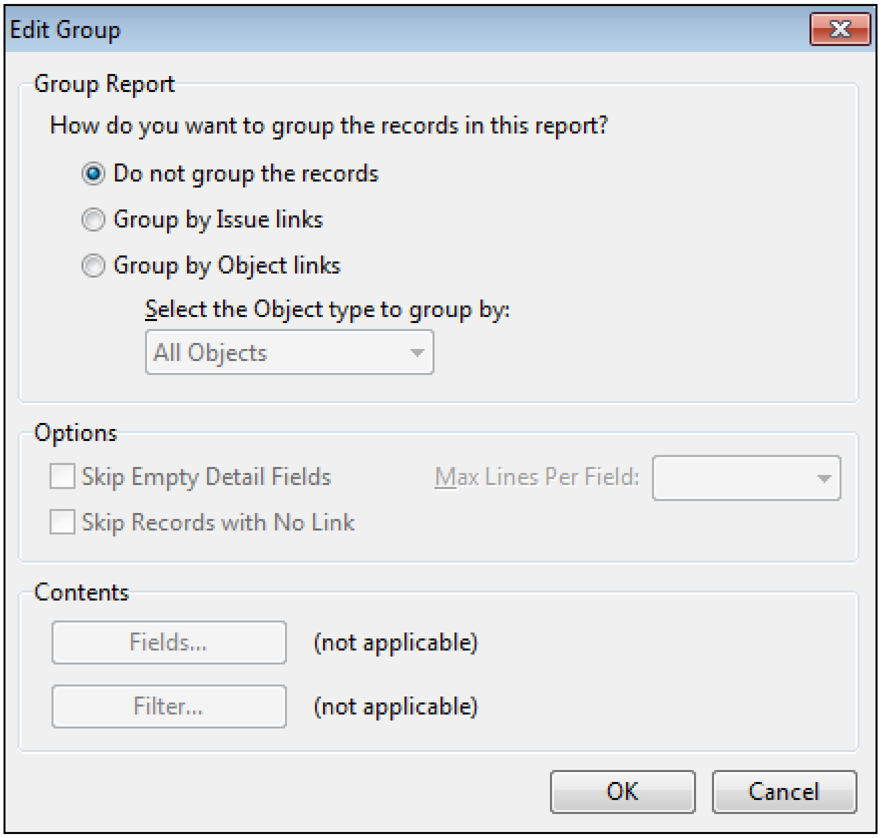
    In the **Edit Report** dialog box, click the **Filter** button to add/remove a spreadsheet filter, then click **OK**.


ReportBook Report Filter
Current Filter
Current Filter:
Remove Current Filter
(No Filter)
Saved Filters
Linked Object
Linked Issue
OK
Cancel

- Click the **Current Filter** bar to display active filters for the selected spreadsheet. Select the filter and click the **Remove Current Filter** button to delete the active filter.
- Click the **Saved Searches** bar to use a filter that is already created.
- Click the **Linked Object** bar to only include records that are linked to selected objects, and additionally that are in selected fields.
- Click the **Linked Issue** bar to select an issue to use an a filter for the report. Select the **Include sub-issues** check box, if you want this option.

16. **To group case records**

    In the **Edit Report** dialog box, click the **Group** button to select whether to group spreadsheet records by issue or object, then click **OK**.



Edit Group

Group Report

How do you want to group the records in this report?

● Do not group the records

○ Group by Issue links

○ Group by Object links

Select the Object type to group by: All Objects

Options

☐ Skip Empty Detail Fields

☐ Skip Records with No Link

Max Lines Per Field:

Contents

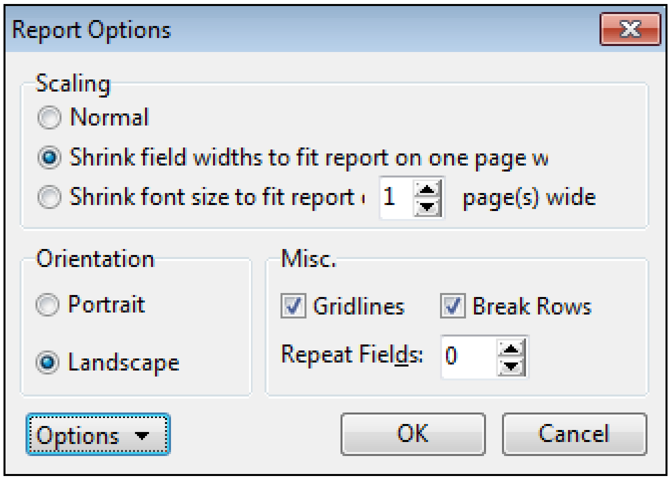
Fields... (not applicable)

Filter... (not applicable)

- If you select **Group by Object** links, click on an object spreadsheet to group the records by object type.
- In the **Options** area, select check boxes to indicate whether you are skipping empty detail fields and records with no links. In the **Max Lines Per Field**, type or click on the number of maximum lines to include in the report.
- In the **Contents** area, click the **Fields** button to add any hidden fields to the report. If you are grouping records by issue links, click the **Filter** button to select which issues to use as a filter. If you are grouping records by object, the **Filter** button is unavailable.

17. **To select print options**

In the **Edit Report** dialog box, click the **Options** button to select report print options, then click **OK**.



Report Options

Scaling

○ Normal

● Shrink field widths to fit report on one page w

○ Shrink font size to fit report ‹ 1 page(s) wide

Orientation

○ Portrait

● Landscape

Misc.

☑ Gridlines ☑ Break Rows

Repeat Fields: 0

- In the **Scaling** area, select whether you want normal scaling, to shrink field widths, or to shrink the font size.
- In the **Orientation** area, select whether you want portrait or landscape.
- In the **Misc.** area, select whether to include gridlines, page breaks by rows, and enter the number of repeat fields you want to allow.
- Click the **Options** button to save these settings as your default print options or to load CaseMap's default settings.

18. In the **Edit Report** dialog box, click the **Preview** button to review the ReportBook before printing, then click **Close**.

    You may also print the report directly from the Print Preview window.

19. Click the **Print** button to select the printer destination and additional print settings, then click **OK**.

20. Click **OK** to close the ReportBook utility when you are finished.

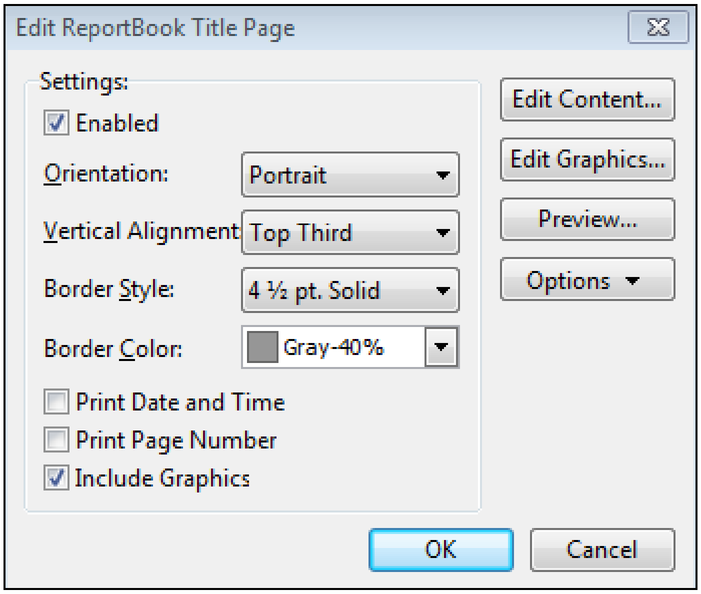
21. Click **OK** to return to the ReportBook utility.

22. In the **Add report(s) to the ReportBook** dialog box, continue creating additional custom reports (following the steps outlined above) to add to your custom ReportBook, then click **Next**.

23. In the **Choose pages and modify report options** dialog box, select the check boxes for the title pages you want to include in the ReportBook.

24. **To customize the title pages**

    Click the **Click here to Modify Report Options** button to open the Edit ReportBook Title Page dialog box.



Edit ReportBook Title Page

Settings:

☑ Enabled

Orientation: Portrait

Vertical Alignment: Top Third

Border Style: 4 ½ pt. Solid

Border Color: Gray-40%

☐ Print Date and Time

☐ Print Page Number

☑ Include Graphics

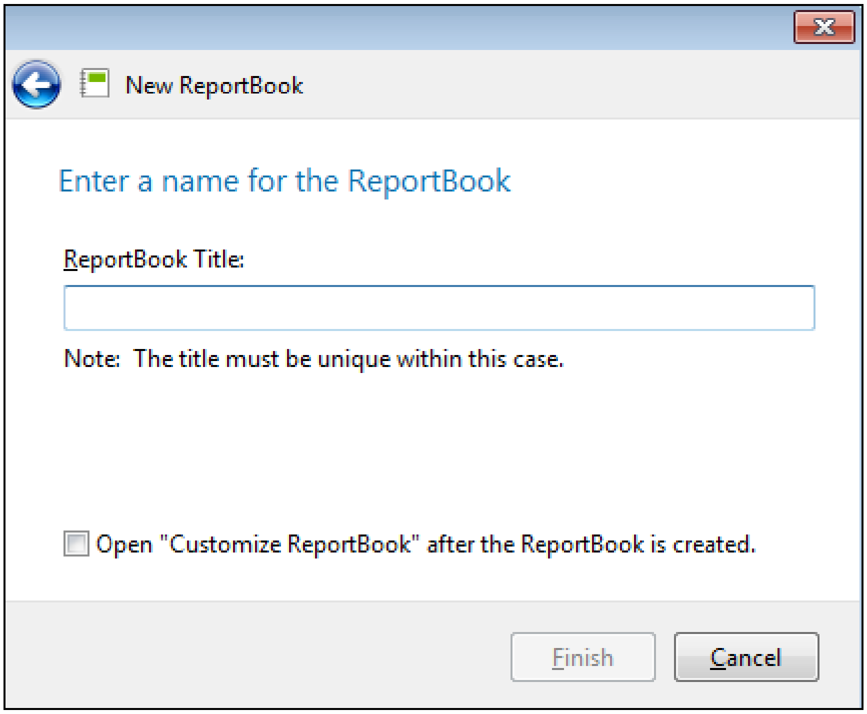
In the **Settings** area:

- Select the **Enabled** check box to use CaseMap's default title page layouts.
- In the **Orientation** listing, click whether you want **Portrait** or **Landscape**.
- In the **Vertical Alignment** listing, click on the alignment option you want: **Top**, **Top Third**, **Middle**, **Bottom Third**, **Bottom**.
- In the **Border Style** listing, click the point size for the border width.
- In the **Border Color** listing, click the color scale you want to use.
- Select/clear check boxes to include **Print Date and Time**, **Print Page Number**, and **Include Graphics**.
- Click the **Edit Content** button to modify the content that prints on each page, including typing or pasting text, modifying the font size and color, adjusting text alignment, inserting symbols or specific fields.
- Click the **Edit Graphics** button to preview current graphics, and modify the header and footer graphic settings. You can also remove, load, and save graphics for title pages.
- Click the **Preview** button to review changes you make before saving and printing the report.
- Click the **Options** button to save settings as your default or to load CaseMap's default settings.

Changes to graphics affect all users and all reports in the case.

25. Click **Next** to continue.

26. In the **Enter a name for the ReportBook** dialog box, type in a unique name for the custom ReportBook.


New ReportBook

Enter a name for the ReportBook

ReportBook Title:

Note: The title must be unique within this case.

☐ Open "Customize ReportBook" after the ReportBook is created.

27. Click the **Finish** button to generate the ReportBook.

    The new ReportBook now displays in the Available ReportBooks box in the Manage ReportBooks dialog box.

    Notice that the number of reports within the ReportBook and who it was created by are also displayed.

28. In the **Manage ReportBooks** dialog box, click **Close** when you are finished.

Related Topics

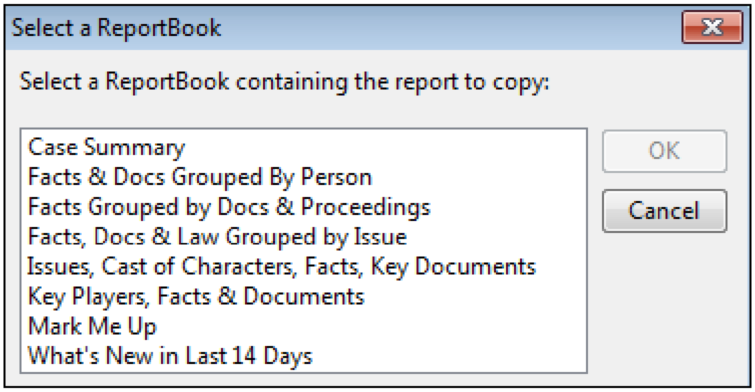
About creating ReportBooks
Printing pre-built ReportBooks
Managing ReportBooks
Exporting/importing ReportBooks

### *Creating a By Issue report from a current view*

The Create By Issue Report from Current View ReportBook tool allows you to create a new By Issue report from a current spreadsheet view and add it to a pre-existing ReportBook. CaseMap creates the By Issue report with the same fields, sort order, and filter as the current spreadsheet view. The report is then grouped by issue with default group options.

### ⊟ To create a By Issue report from a current view

1. On the **Reports** tab, click **Tools**.
2. On the shortcut menu, click **Create By Issue Report from Current View**.
3. In the message box, click **OK** to continue.
4. In the **Select a ReportBook** dialog box, select the ReportBook you want to add the report to, then click **OK**.


Select a ReportBook
Select a ReportBook containing the report to copy:
Case Summary
Facts & Docs Grouped By Person
Facts Grouped by Docs & Proceedings
Facts, Docs & Law Grouped by Issue
Issues, Cast of Characters, Facts, Key Documents
Key Players, Facts & Documents
Mark Me Up
What's New in Last 14 Days
OK
Cancel

5. In the **New ReportBook Report** dialog box, type in a name for the new report, then click **OK**.
6. In the **New ReportBook Report** dialog box, use the **Move Up** and **Move Down** buttons to organize the reports within the ReportBook, then click **OK**.
7. In the message box confirming the new report addition, click **OK**.

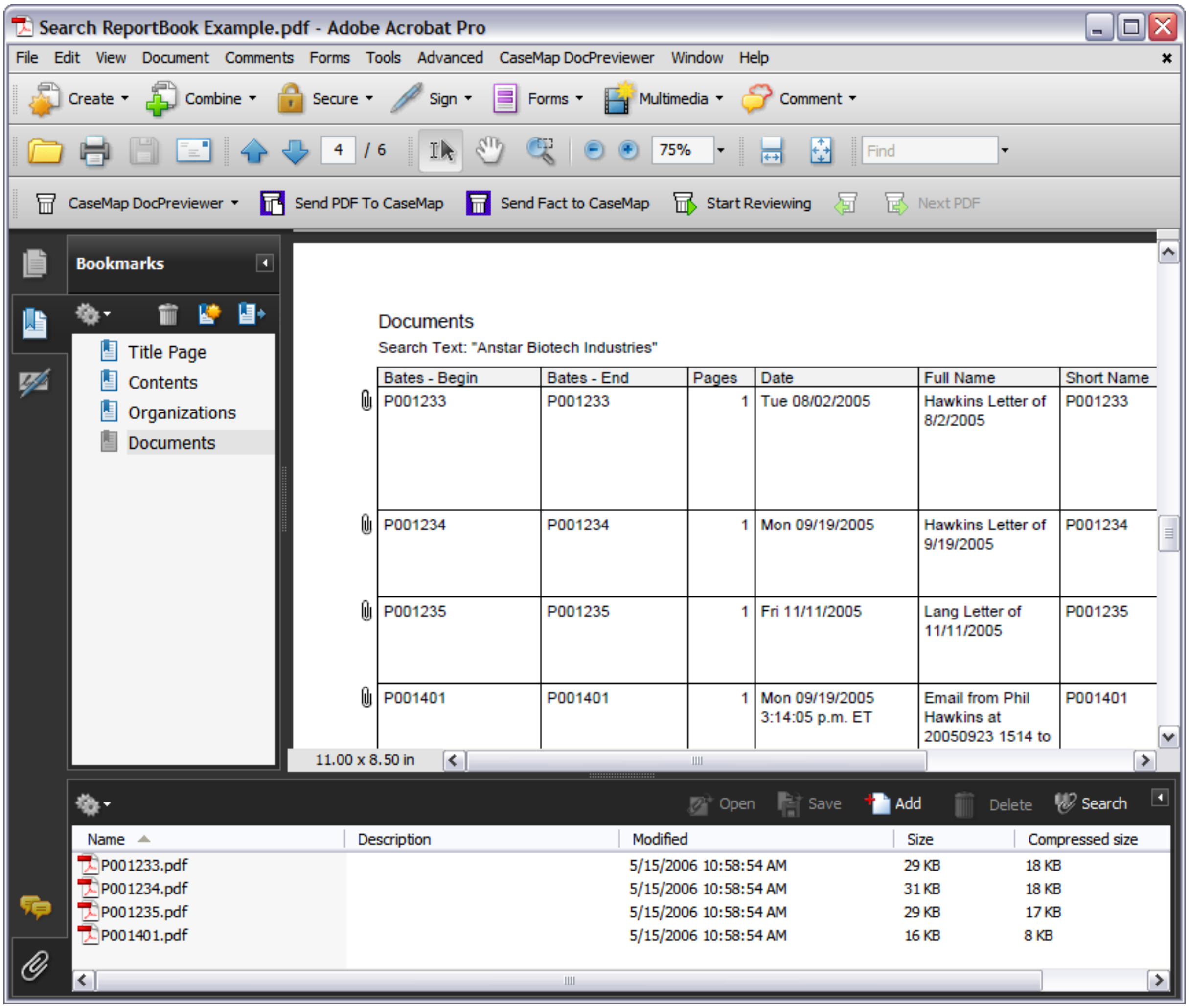
   The new By Issue report is now included in the selected ReportBook.

Related Topics

About creating ReportBooks
Printing pre-built ReportBooks
Creating custom ReportBooks

### *Printing a Search ReportBook*

You can send search results to a Search ReportBook, which creates a report for each spreadsheet record and all linked files returned by a search. The Search ReportBook embeds the linked files in the PDF report, allowing you and others to view the documents without having to open the case in CaseMap. The ReportBook prints the search query at the top left of each page.


Search ReportBook Example.pdf - Adobe Acrobat Pro
File Edit View Document Comments Forms Tools Advanced CaseMap DocPreviewer Window Help
Create Combine Secure Sign Forms Multimedia Comment
4 / 6
75%
Find
CaseMap DocPreviewer
Send PDF To CaseMap
Send Fact to CaseMap
Start Reviewing
Next PDF
Bookmarks
Title Page
Contents
Organizations
Documents
11.00 x 8.50 in
Open Save Add Delete Search

Documents

Search Text: "Anstar Biotech Industries"

| Bates - Begin | Bates - End | Pages | Date | Full Name | Short Name |
|---|---|---|---|---|---|
| P001233 | P001233 | 1 | Tue 08/02/2005 | Hawkins Letter of 8/2/2005 | P001233 |
| P001234 | P001234 | 1 | Mon 09/19/2005 | Hawkins Letter of 9/19/2005 | P001234 |
| P001235 | P001235 | 1 | Fri 11/11/2005 | Lang Letter of 11/11/2005 | P001235 |
| P001401 | P001401 | 1 | Mon 09/19/2005 3:14:05 p.m. ET | Email from Phil Hawkins at 20050923 1514 to | P001401 |

| Name | Description | Modified | Size | Compressed size |
|---|---|---|---|---|
| P001233.pdf | | 5/15/2006 10:58:54 AM | 29 KB | 18 KB |
| P001234.pdf | | 5/15/2006 10:58:54 AM | 31 KB | 18 KB |
| P001235.pdf | | 5/15/2006 10:58:54 AM | 29 KB | 17 KB |
| P001401.pdf | | 5/15/2006 10:58:54 AM | 16 KB | 8 KB |

In PDF output of the ReportBook, paperclip icons indicate links to files, which can be opened in an Attachments pane of the PDF reader. Double-clicking on a file opens the document in a new window, in its native application.

The Search ReportBook is organized by spreadsheet. CaseMap will only embed files that are in the Linked Files field in object spreadsheets or the Authority and Extracts spreadsheet or Source(s) field for the Facts spreadsheet.

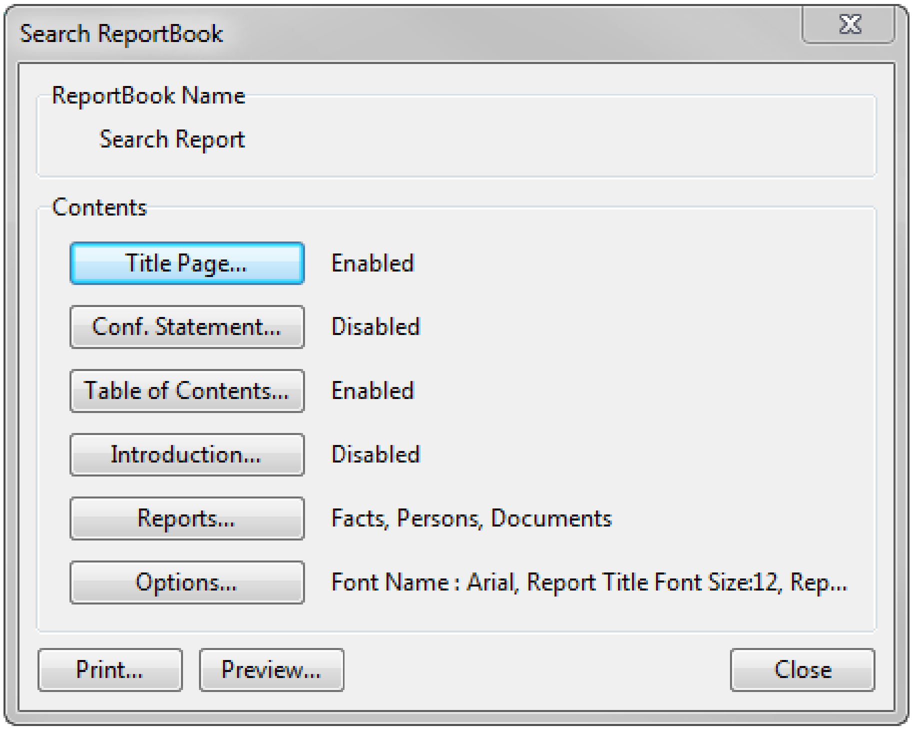
The Search ReportBook includes only those spreadsheet fields in the current view. If you have modified the spreadsheet field display order, the Search ReportBook will print the fields in your current view. However, the next time you print the Search ReportBook it will return to using a spreadsheet's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

For more information about ReportBooks, see: About ReportBooks.

For more information about embedding links in ReportBooks, see Embedding linked documents in reports.

### ⊟ To print a Search ReportBook

1. In the **Search** field, type in a search and click the **Full Text Search** button.
2. In the **Search Results** pane, click the **Search ReportBooks** link in the **Resources** pane.
3. In the **Search ReportBook** dialog box, modify the ReportBook contents as needed.


Search ReportBook
Title Page...
Conf. Statement...
Table of Contents...
Introduction...
Reports...
Options...
Print...
Preview...
Close

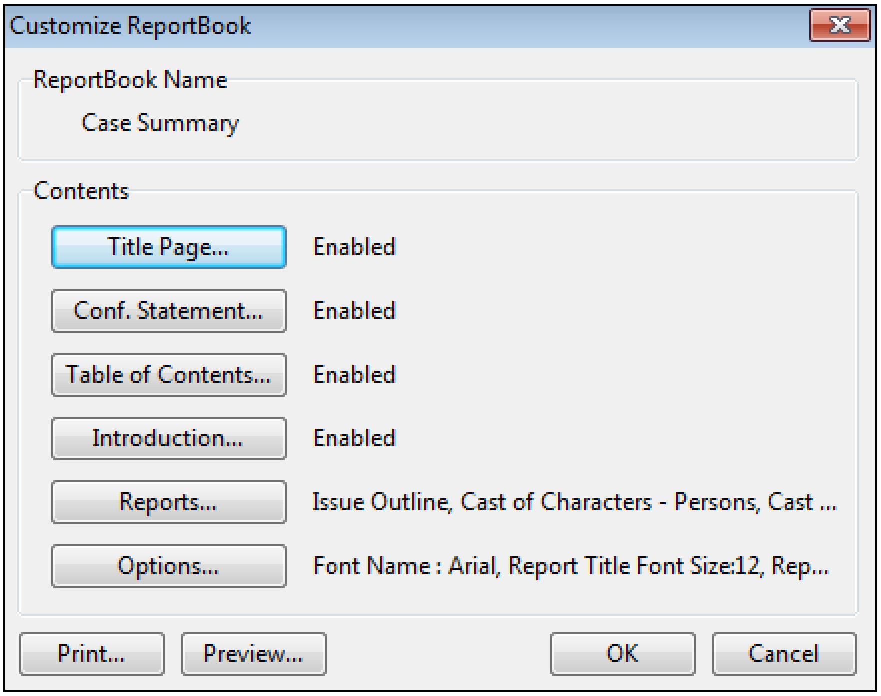
ReportBook Name: Search Report

Contents

| | |
|---|---|
| Title Page... | Enabled |
| Conf. Statement... | Disabled |
| Table of Contents... | Enabled |
| Introduction... | Disabled |
| Reports... | Facts, Persons, Documents |
| Options... | Font Name : Arial, Report Title Font Size:12, Rep... |

#### To modify the title page

1. In the **Customize ReportBook** dialog box, click on the **Title Page** button to modify content, graphics, and settings.



ReportBook Name
Case Summary

Contents

| | |
|---|---|
| Title Page... | Enabled |
| Conf. Statement... | Enabled |
| Table of Contents... | Enabled |
| Introduction... | Enabled |
| Reports... | Issue Outline, Cast of Characters - Persons, Cast ... |
| Options... | Font Name : Arial, Report Title Font Size:12, Rep... |

2. In the **Settings** area:
    - Select the **Enabled** check box to use CaseMap's default title page layouts.
    - In the **Orientation** listing, click whether you want **Portrait** or **Landscape**.
    - In the **Vertical Alignment** listing, click on the alignment option you want: **Top**, **Top Third**, **Middle**, **Bottom Third**, **Bottom**.
    - In the **Border Style** listing, click the point size for the border width.
    - In the **Border Color** listing, click the color scale you want to use.
    - Select check boxes to include **Print Date and Time**, **Print Page Number**, and **Include Graphics**.
3. Click the **Edit Content** button to modify the content that prints on each page, including typing or pasting text, modifying the font size and color, adjusting text alignment, inserting symbols or specific fields.
4. Click the **Edit Graphics** button to preview current graphics, and modify the header and footer graphic settings. You can also remove, load, and save graphics for title pages.
5. Click the **Preview** button to review changes you make before saving and printing the report.
6. Click the **Options** button to save settings as your default or to load CaseMap's default settings.

Changes to graphics affect all users and all reports in the case.

### To modify the confidentiality statement

1. In the **Customize ReportBook** dialog box, click the **Conf. Statement** button.
2. In the **Edit ReportBook Confidentiality Statement** dialog box, select the **Enabled** check box under the Settings heading.
3. In the **Edit ReportBook Confidentiality Statement** dialog box, click the **Edit Content** button.
4. In the **Edit ReportBook Confidentiality Statement Content** window, modify text as well as font size and style, symbols, and fields using the toolbar buttons.
5. Click **OK** to save the changes.
6. In the **Edit ReportBook Confidentiality Statement** dialog box, modify additional preferences in the **Settings** area that you want applied to the confidentiality statement page.

   Settings made here only affect the confidentiality statement and not changes made to the same settings when you click the Title Page or Introduction buttons.
7. Click the **Preview** button to review your changes.
8. Click **Close** to close the preview screen.
9. Click **OK** to save the changes.
10. In the **Search ReportBook** dialog box, click **Close**.

### To modify the table of contents

1. In the **Customize ReportBook** dialog box, click the **Table of Contents** button.
2. In the **Edit ReportBook Table of Contents** dialog box, click the **Edit Content** button.
3. In the **Edit ReportBook Table of Contents Content** window, modify text as well as font size and style, symbols, and fields using the toolbar buttons.
4. Click **OK** to save the changes.
5. In the **Edit ReportBook Table of Contents** dialog box, modify additional preferences in the **Settings** area that you want applied to the table of contents page.

   Settings made here only affect the table of contents page and not changes made to the same settings when you click the Title Page or Conf. Statement buttons.
6. Click the **Preview** button to review your changes.
7. Click **OK** to save the changes.

### To modify the introduction

1. In the **Customize ReportBook** dialog box, click the **Introduction** button.
2. In the **Edit ReportBook Confidentiality Introduction** dialog box, select the **Enabled** check box under the **Settings** heading.

3. In the **Edit ReportBook Introduction** dialog box, click the **Edit Content** button.

4. In the **Edit ReportBook Introduction Content** window, modify text as well as font size and style, symbols, and fields using the toolbar buttons.

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

6. In the **Edit ReportBook Introduction** dialog box, modify additional preferences in the **Settings** area that you want applied to the introduction page.

   Settings made here only affect the introduction page and not changes made to the same settings when you click the Title Page or Conf. Statement buttons.

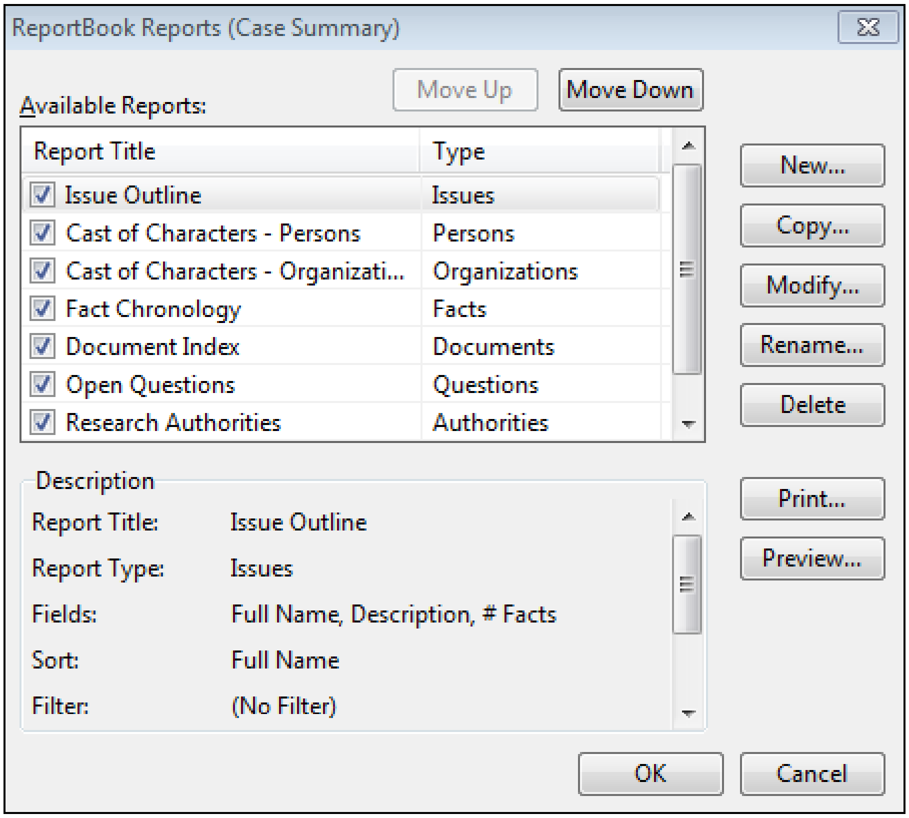
7. Click the **Preview** button to review your changes.

8. 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.



| Report Title | Type |
|---|---|
| ☑ Issue Outline | Issues |
| ☑ Cast of Characters - Persons | Persons |
| ☑ Cast of Characters - Organizati... | Organizations |
| ☑ Fact Chronology | Facts |
| ☑ Document Index | Documents |
| ☑ Open Questions | Questions |
| ☑ Research Authorities | Authorities |

Description

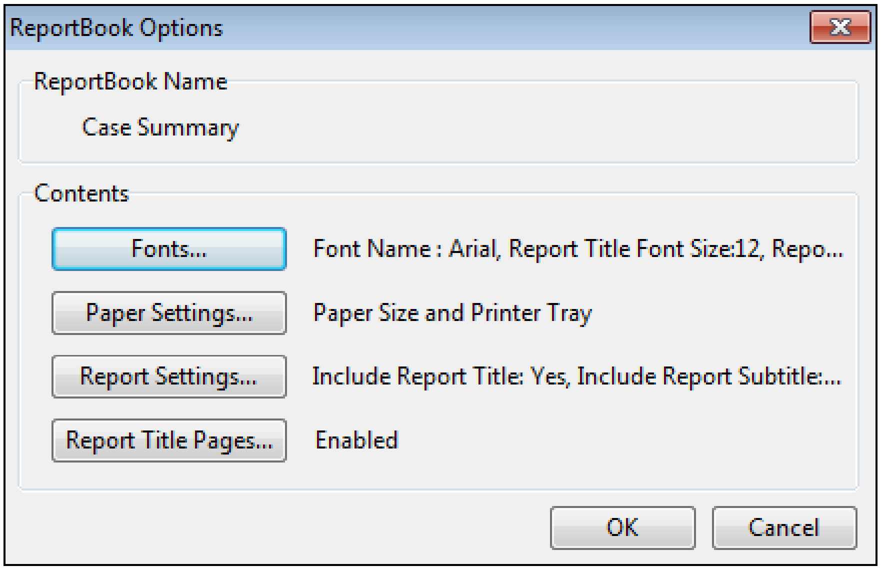
| | |
|---|---|
| Report Title: | Issue Outline |
| Report Type: | Issues |
| Fields: | Full Name, Description, # Facts |
| Sort: | Full Name |
| Filter: | (No Filter) |

To modify or edit a report within a ReportBook, click the Modify button to change fields, sort order, filters, groups, and print options for the report. Click the Rename button to change the report name within the ReportBook.

3. Click **OK** to save the changes.

### To modify options

1. In the **Customize ReportBook** dialog box, click the **Options** button.
2. In the **ReportBook Options** dialog box, review the name in the **ReportBook Name** area.


ReportBook Options
ReportBook Name
Contents
Fonts...
Paper Settings...
Report Settings...
Report Title Pages...
OK
Cancel

Case Summary

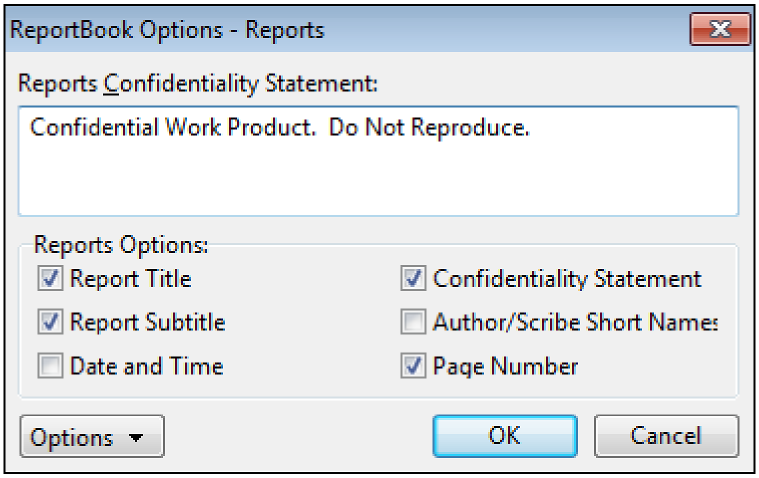
Font Name : Arial, Report Title Font Size:12, Repo...

Paper Size and Printer Tray

Include Report Title: Yes, Include Report Subtitle:...

Enabled

3. In the **Contents** area, click the **Fonts** button to modify the font type and size for the title page and body content, then click **OK**.
4. Click the **Paper Settings** button to select the paper size and printer tray, then click **OK**.
5. Click the **Report Settings** button to review the report confidentiality statement and select or clear check boxes to include a report title, subtitle, date and time, confidentiality statement, author/scribe short names, and page numbers.



Reports Confidentiality Statement:

Confidential Work Product. Do Not Reproduce.

Reports Options:

☑ Report Title ☑ Confidentiality Statement
☑ Report Subtitle ☐ Author/Scribe Short Names
☐ Date and Time ☑ Page Number

    6. Click **OK** to save the changes.
    7. Click the **Report Title Pages** button to modify settings for the ReportBook title page, then click **OK**.
    8. In the **ReportBook Options** dialog box, click **OK** to continue.
    9. In the **Customize ReportBook** dialog box, click **OK** to save changes to all reports 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 options, then click **OK**.

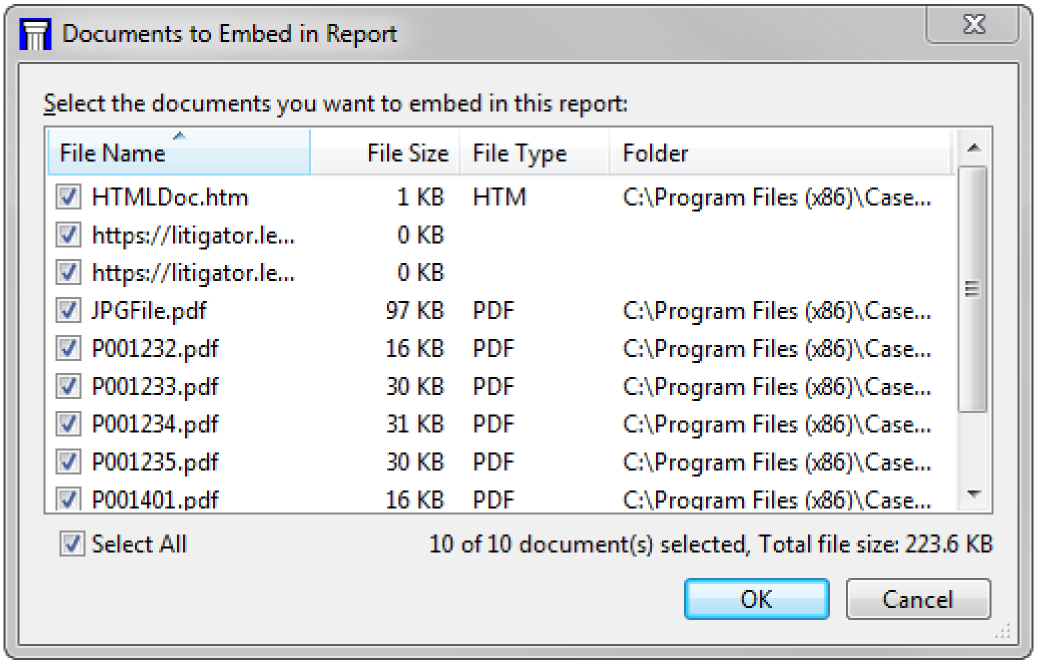
   If you print to a network printer or HTML file, linked documents will not print.

   **To print with embedded linked files**

    1. In the Search ReportBook dialog box, click the **Print** button.
    2. In the **Print** dialog box, click **PDF** in the Destination box.
    3. In the **Adobe PDF** box, click **Save As PDF**.
    4. Click **OK** to continue.
    5. In the **Save As PDF** dialog box, navigate to the folder where you want to save the report, then click **Save**.
    6. In the message box, click **Yes** to embed copies of linked documents within the PDF report.

       If you select No, the linked documents are not embedded in the report and no paperclip icons display next to spreadsheet records.

    6. In the **Documents to Embed in Report** dialog box, review the list of documents linked to the current spreadsheet's records.


Documents to Embed in Report

Select the documents you want to embed in this report:

| File Name | File Size | File Type | Folder |
|---|---|---|---|
| ☑ HTMLDoc.htm | 1 KB | HTM | C:\Program Files (x86)\Case... |
| ☑ https://litigator.le... | 0 KB | | |
| ☑ https://litigator.le... | 0 KB | | |
| ☑ JPGFile.pdf | 97 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001232.pdf | 16 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001233.pdf | 30 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001234.pdf | 31 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001235.pdf | 30 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001401.pdf | 16 KB | PDF | C:\Program Files (x86)\Case... |

☑ Select All

10 of 10 document(s) selected, Total file size: 223.6 KB

Documents are sorted by file name.

7. Clear the check box next to any document or file you want to remove from the list.

8. Click **OK** to continue.

   A message displays if the total file size exceeds 5 MB, allowing you the option to remove some files before printing.

9. In the message box asking to view the file now, click **Yes**.

10. When the report opens in Adobe Acrobat or Reader, navigate to a report page that contains spreadsheet records.

    When a ReportBook is printed to PDF, the table of contents is hyperlinked to the relevant content section of the report.

11. Click on the **paperclip** icon next to a spreadsheet record to open the linked document.

12. In the message box asking if you would like to open the file or web site, click **OK** or **Allow**.

    The document or file opens in a new window and in its native source file application.

13. Click the **paperclip** icon in the lower, left corner of Adobe Acrobat or Reader.

    An Attachments pane displays in the bottom of the window.

14. In the **Attachments** pane, double-click on the linked document or file you want to view.

    The document opens in a new window in its native application.

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

Related Topics

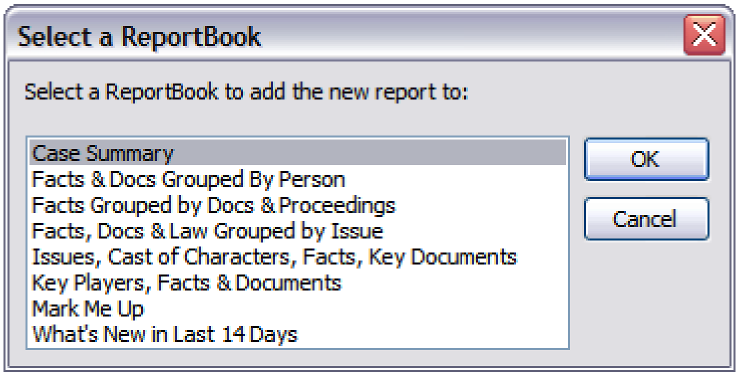
[About ReportBooks]
[About printing reports]
[Embedding linked documents in reports]
[About searching]
[Viewing search results]

### *Adding a custom spreadsheet to a ReportBook*

Using the Create Report from Current View tool, you can create a report from a custom spreadsheet view and add it to a pre-existing ReportBook. CaseMap creates the custom report with the same fields, sort order, and filter as the current spreadsheet view.

#### To add a custom spreadsheet report to a ReportBook

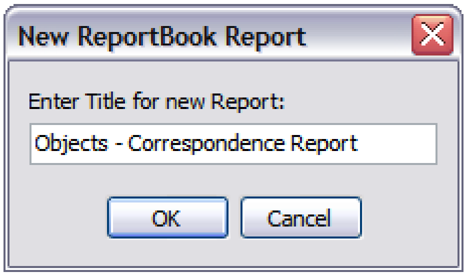
1. On the **Reports** menu, click **ReportBooks**.
2. On the shortcut menu, click **ReportBook Tools** and then click **Create Report from Current View**.
3. In the message box, click **OK** to continue.
4. In the **Select a ReportBook** dialog box, select the ReportBook you want to add the report to, then click **OK**.


Select a ReportBook

Select a ReportBook to add the new report to:

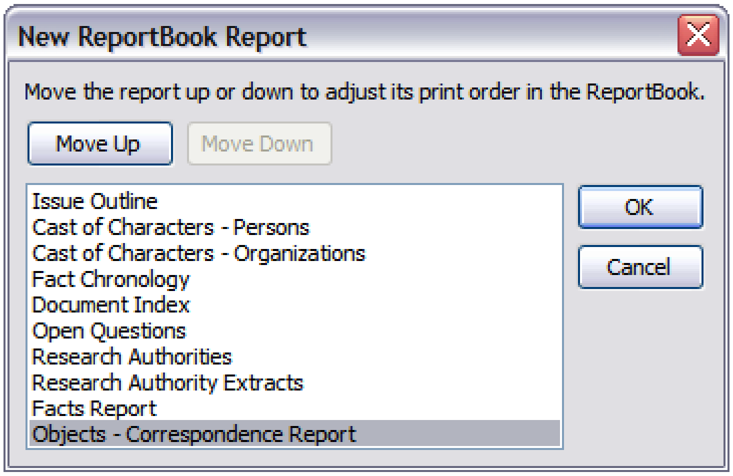
Case Summary
Facts & Docs Grouped By Person
Facts Grouped by Docs & Proceedings
Facts, Docs & Law Grouped by Issue
Issues, Cast of Characters, Facts, Key Documents
Key Players, Facts & Documents
Mark Me Up
What's New in Last 14 Days

5. In the **New ReportBook Report** dialog box, type in a name for the new report, then click **OK**.



Enter Title for new Report: Objects - Correspondence Report

6. In the **New ReportBook Report** dialog box, use the **Move Up** and **Move Down** buttons to organize the reports within the ReportBook, then click **OK**.



Move the report up or down to adjust its print order in the ReportBook.

Issue Outline
Cast of Characters - Persons
Cast of Characters - Organizations
Fact Chronology
Document Index
Open Questions
Research Authorities
Research Authority Extracts
Facts Report
Objects - Correspondence Report

7. In the message box confirming the new report addition, click **OK**.

   The new custom report is now included in the selected ReportBook.

Related Topics

About ReportBooks
Adding custom spreadsheets
Creating a By Issue report from a current view

When you click the Reports ribbon and then click ReportBooks, you will see a shortcut menu listing the eight pre-built templates that you can use immediately. You can copy and customize each pre-built template to use as a starting point for additional ReportBook templates.

Each of the eight ReportBooks include a cover page, confidentiality statement, table of contents, introduction, and report-specific title pages. Data in each ReportBook will change substantially over time as case data grows and changes. These reports are designed for case staff to use as picks and shovels during case analysis. They are intended to be refined and updated as the case evolves.

If CaseMap cannot find data for a ReportBook, it will skip the report and display a message indicating which of the reports within the ReportBook is empty. This can occur when a case is in its initial stages or when you run a filter tied to a report and no data is located. If you are using the Table of Contents, the report is automatically adjusted so that it references only those reports generated with content.

### To review pre-built ReportBook descriptions

The following table provides a listing and description of the pre-built ReportBooks.

**CaseMap Pre-built ReportsBooks**

| ReportBooks | Description |
|---|---|
| Case Summary | Use to produce an overview report for case staff meetings or share with clients to keep them apprised of case progress. Contains a summary report for each primary spreadsheet. The default report order is: Issues, Cast of Characters - Persons, Cast of Characters - Organizations, Fact Chronology, Document Index, Open Questions, Research - Authorities, and Research - Authority Extracts. |
| Facts & Docs Grouped by Person | Includes a Statement of Confidentiality, Table of Contents, Introduction, Cast of Characters - Persons, Facts by Person (all facts associated with everyone in the case of characters with linked facts), and Documents by Person (documents linked to players in the case as authors/recipients, etc.). |
| Facts Grouped by Docs & Proceedings | Includes a Statement of Confidentiality, Table of Contents, Introduction, Facts Grouped by Document (all of the facts sourced from case documents), and Facts Grouped by Proceedings (all of the facts sourced from case proceedings). |
| Facts, Docs & Law Grouped by Issue | Contains reports for Fact by Issue, Documents by Issue, and Research - Authorities by Issue. |
| Issues, Cast of Characters, Facts, Key Documents | Contains the four reports identified in the name: Issues, Cast of Characters, Facts, and Key Documents. |
| Key Players, Facts and Documents | Contains three reports: Key Persons and Organizations, Key Facts, and Key Documents. |
| Mark Me Up | Use to get your case analysis started after meeting with a new client. Use your notes to create an initial Cast of Characters, Document Index, and Fact Chronology for the case. Print the Mark Me Up report for your client to review for errors and complete with additional field information for potential sources and document descriptions. |
| What's New in | Includes all new records (not updated records) entered in the case in |

**CaseMap Pre-built ReportsBooks**

| ReportBooks | Description |
|---|---|
| the Last 14 Days | the two weeks prior to when the ReportBook is run. |

When you import the Intake Interview Form into a case, CaseMap automatically creates a ReportBook of the client information. A message box alerts you to review the report after the utility has completed the data import. We recommend that you save a copy of the report along with other casereports for reference purposes.

### To print pre-built ReportBooks

The steps for printing a ReportBook are the same for each. Simply choose the ReportBook you want and then click the print option on the shortcut menu or using print options available within the Print Preview window.

1. On the **Reports** menu, click **ReportBooks**.
2. On the shortcut menu, click the report you want and then click **Preview**.
3. In the **Print Preview** window, click the **Prior Page** or **Next Page** buttons to navigate the ReportBook.
4. Review the ReportBook reports to verify the content that prints in each.
5. Also review the ReportBook's Title Page, Confidentiality Statement, and Introduction to think of how you might customize the content for your organization.
6. To print the ReportBook, choose from the following methods:

   ***In the Print Preview window:***

   - Click the Print button to print a hard copy report.
   - Click the PDF button and then click Print to PDF or Print to PDF (Email).
   - Click the HTML button to Print to Web Pages, Print to Web Pages (Zip), or Print to Web Pages (Zip and Email).

   ***On the ReportBooks shortcut menu:***

   - Click on the report you want and then click one of the following: Print, Preview, Save as PDF, Email as PDF.

For more information, see Changing report print options.

Related Topics

About creating ReportBooks
Creating custom ReportBooks

About printing reports
Changing report print options

### *Embedding linked documents in reports*

Embedding linked documents in reports and ReportBooks printed to PDF files, allows you to share the report and supporting files with others who do not have access to CaseMap or the case. CaseMap will only embed files that are in the Linked Files field in object spreadsheets and the Authority and Extracts spreadsheet, or in the Source(s) field for the Facts spreadsheet.

Once the report is printed to PDF, spreadsheet records with linked documents or files will display a paperclip icon. Clicking the paperclip icon opens the linked document in a new window, in its native application.

You have the option to include redacted or original documents, and you can remove documents you do not want embedded, such as confidential documents or large files. Large files may slow the printing process and bloat the size of the report. CaseMap will display a message if the total file size exceeds 5 MB, allowing you the option to remove some files before printing. CaseMap remembers what documents you remove from the list of documents to embed in the report, so the next time you create a report those files will remain unchecked when you review the list.

#### ⊟ To review report considerations with linked documents

Review the Report Considerations with Linked Documents table to learn more about using this feature.

| Report Considerations with Linked Documents |
|---|
| CaseMap must have read access to any embedded files saved locally or in a network folder. |
| Linked documents are embedded in their native file format; they are not converted to a PDF when the PDF report is printed. |
| If multiple spreadsheet records link to the same file, then the document will be embedded only once in the PDF report. Each spreadsheet record in the report will have a paperclip icon that links to the embedded file. |
| If a fact record has multiple documents linked to it, CaseMap will embed all linked documents and display multiple paperclips in the Facts spreadsheet. All other spreadsheets display one paperclip for linked files. |
| CaseMap will only embed files that are in the Linked Files field in object and research (authorities and extracts) spreadsheets or Source(s) field for the Facts spreadsheet. |
| CaseMap will toggle between display/non-display of the redaction reason on the printed output for embedded PDF reports and/or produced documents when the 'Display redaction reason' option is check/unchecked in the DocManager print option dialog box. |

| Report Considerations with Linked Documents |
|---|
| CaseMap will try to embed documents linked to document management system plug-ins, but does not support Concordance and TextMap. |
| CaseMap will stop displaying multiple paperclips for a report's spreadsheet record when the margin can no longer display any more. All documents will still be embedded in the report. |
| Paperclip icons do not correspond to the order that files are displayed in a spreadsheet field; paperclips display in a random order. |
| Paperclip display is dependent on the font size selected for print options. If the font size is too big, all paperclips may not display in the margin. |
| Images that CaseMap converts to OCR will be embedded as PDF files. |

### To embed linked documents in reports

1. Navigate to the **Documents** spreadsheet and click on/highlight the document that you want to print as a report.

2. Ensure that spreadsheet records are filtered and fields sorted to display the content you want in the report.

   Report content is What-You-See-Is-What-You-Get (WYSIWYG) based on your current spreadsheet view.

3. On the **Reports** menu, click **PDF**, and on the submenu, click **Print to PDF**.

4. In the **Save As PDF** dialog box, navigate to the folder where you want to save the report, type in a new file name, and then click **Save**.

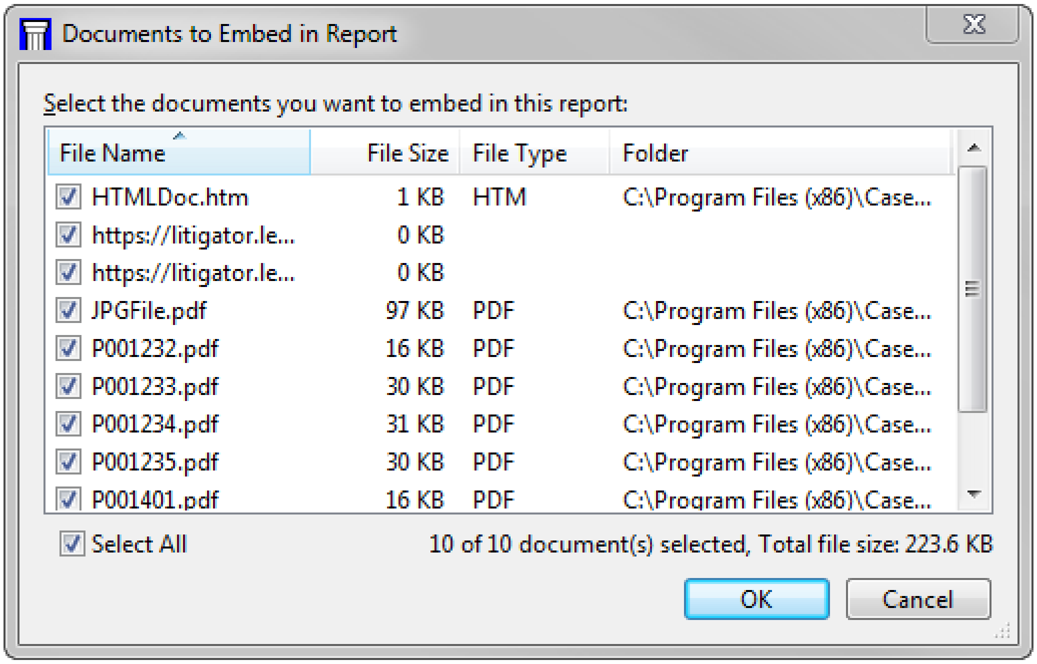
   If the file already exist, click Yes to replace it, or click No, and repeat the step above.

5. In the message box, click **Yes** to continue without shrinking the field widths.

6. In the next message box, click **Yes** to embed copies of linked documents within the PDF report.

   If you select No, the linked documents are not embedded in the report and no paperclip icons display next to spreadsheet records.

7. In the **Documents to Embed in Report** dialog box, review the list of documents linked to the current spreadsheet's records.



Select the documents you want to embed in this report:

| File Name | File Size | File Type | Folder |
|---|---|---|---|
| ☑ HTMLDoc.htm | 1 KB | HTM | C:\Program Files (x86)\Case... |
| ☑ https://litigator.le... | 0 KB | | |
| ☑ https://litigator.le... | 0 KB | | |
| ☑ JPGFile.pdf | 97 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001232.pdf | 16 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001233.pdf | 30 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001234.pdf | 31 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001235.pdf | 30 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001401.pdf | 16 KB | PDF | C:\Program Files (x86)\Case... |

☑ Select All

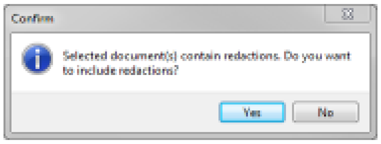
10 of 10 document(s) selected, Total file size: 223.6 KB

Documents are sorted by file name.

8. Optional: Clear the check box next to any document or file you want to remove from the list.

9. Click **OK** to continue.

10. In the redaction message box, click **Yes** to include redactions in the documents.

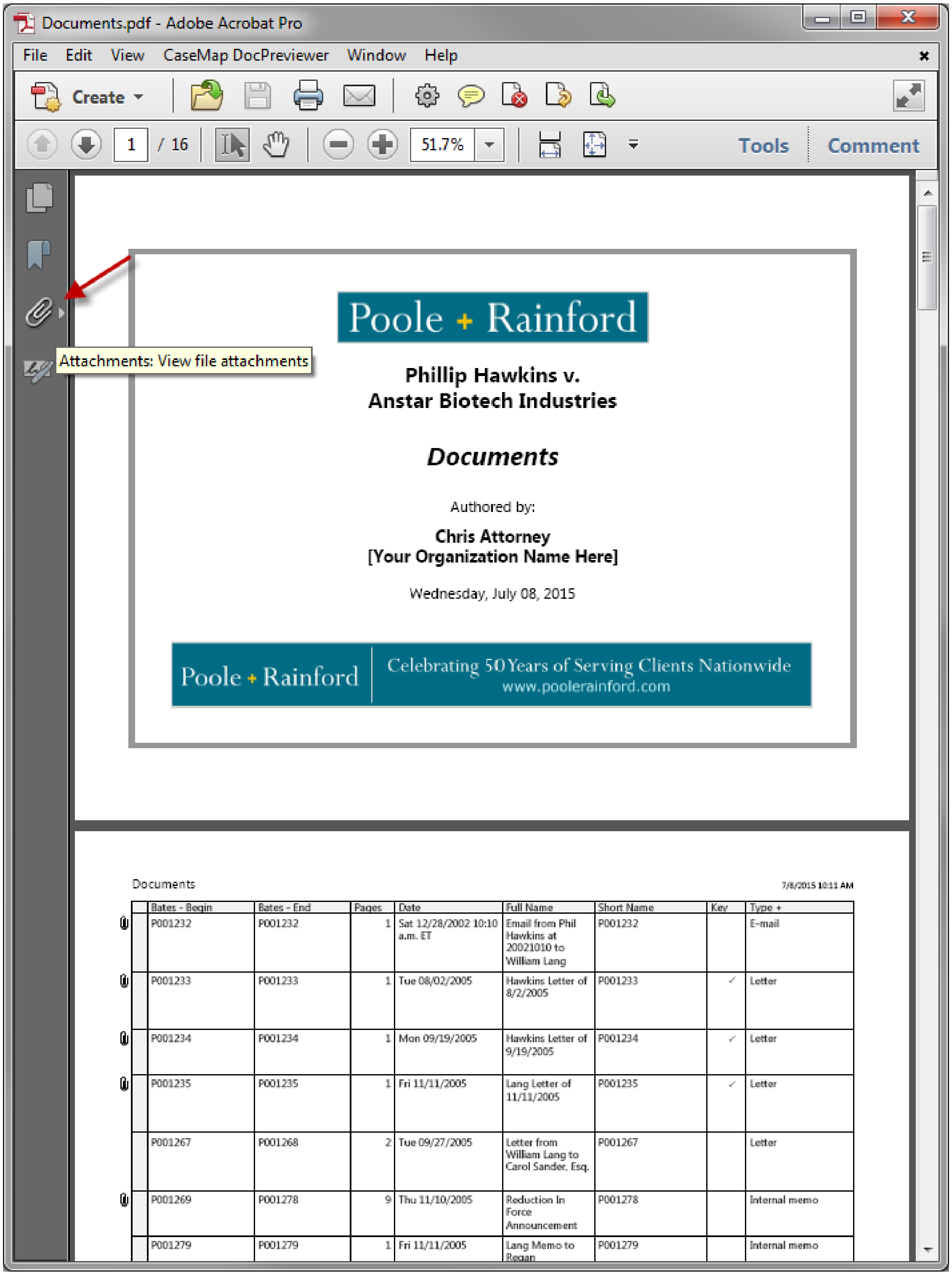


Selected document(s) contain redactions. Do you want to include redactions?

11. In the message box, click **Yes** to open the document now, or click **No** to view it later.

12. In the message box asking to view the file now, click **Yes**.

13. When the report opens in Adobe Acrobat or Reader, navigate to a report page that contains spreadsheet records.


Documents.pdf - Adobe Acrobat Pro
File
Edit
View
CaseMap DocPreviewer
Window
Help
Create
1
/ 16
51.7%
Tools
Comment
Attachments: View file attachments

Poole + Rainford

**Phillip Hawkins v.**
**Anstar Biotech Industries**

***Documents***

Authored by:

**Chris Attorney**
**[Your Organization Name Here]**

Wednesday, July 08, 2015

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Documents 7/8/2015 10:11 AM

| | Bates - Begin | Bates - End | Pages | Date | Full Name | Short Name | Key | Type + |
|---|---|---|---|---|---|---|---|---|
| 📎 | P001232 | P001232 | 1 | Sat 12/28/2002 10:10 a.m. ET | Email from Phil Hawkins at 20021010 to William Lang | P001232 | | E-mail |
| 📎 | P001233 | P001233 | 1 | Tue 08/02/2005 | Hawkins Letter of 8/2/2005 | P001233 | ✓ | Letter |
| 📎 | P001234 | P001234 | 1 | Mon 09/19/2005 | Hawkins Letter of 9/19/2005 | P001234 | ✓ | Letter |
| 📎 | P001235 | P001235 | 1 | Fri 11/11/2005 | Lang Letter of 11/11/2005 | P001235 | ✓ | Letter |
| | P001267 | P001268 | 2 | Tue 09/27/2005 | Letter from William Lang to Carol Sander, Esq. | P001267 | | Letter |
| 📎 | P001269 | P001278 | 9 | Thu 11/10/2005 | Reduction In Force Announcement | P001278 | | Internal memo |
| | P001279 | P001279 | 1 | Fri 11/11/2005 | Lang Memo to Regan | P001279 | | Internal memo |

14. Click on the **paperclip** icon next to a spreadsheet record to open the linked document.

    An attachments pane displays on the left side of the window.

15. In the **Attachments** pane, double-click on the linked document or file you want to review.

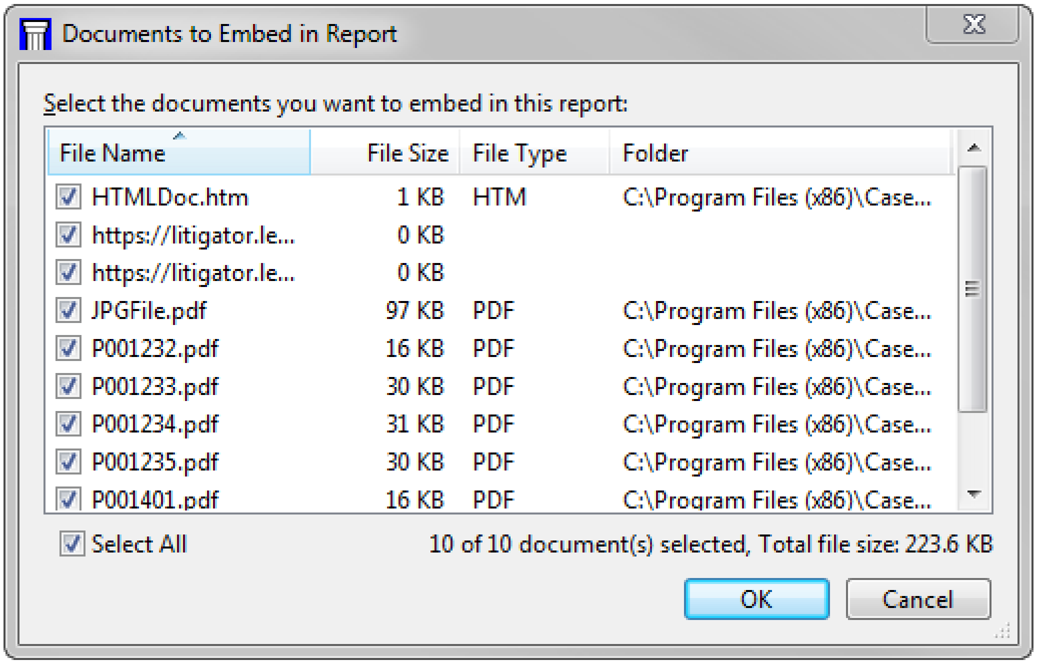
    The document opens in a new window in its native application.

### To embed linked documents in ReportBooks

1. On the **Reports** menu, click **ReportBooks**.
2. On the submenu, click the ReportBook you want to print, and then click **Save as PDF**.
3. In the **Save As PDF** dialog box, navigate to the folder where you want to save the report, type in a new file name, and then click **Save**.

   If the file already exist, click Yes to replace it, or click No, and repeat the step above.
4. In the message box, click **Yes** to embed copies of linked documents within the PDF report.

   If you select No, the linked documents are not embedded in the report and no paperclip icons display next to spreadsheet records.
5. In the **Documents to Embed in Report** dialog box, review the list of documents linked to the current spreadsheet's records.



Select the documents you want to embed in this report:

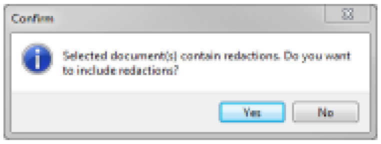
| File Name | File Size | File Type | Folder |
|---|---|---|---|
| ☑ HTMLDoc.htm | 1 KB | HTM | C:\Program Files (x86)\Case... |
| ☑ https://litigator.le... | 0 KB | | |
| ☑ https://litigator.le... | 0 KB | | |
| ☑ JPGFile.pdf | 97 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001232.pdf | 16 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001233.pdf | 30 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001234.pdf | 31 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001235.pdf | 30 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001401.pdf | 16 KB | PDF | C:\Program Files (x86)\Case... |

☑ Select All

10 of 10 document(s) selected, Total file size: 223.6 KB

   Documents are sorted by file name.

6. Optional: Clear the check box next to any document or file you want to remove from the list.
7. In the redaction message box, click **Yes** to include redactions in the documents.



Selected document(s) contain redactions. Do you want to include redactions?

8. In the message box, click **Yes** to open the document now, or click **No** to view it later.

9. When the report opens in Adobe Acrobat or Reader, navigate to a report page that contains spreadsheet records.

   When a ReportBook is printed to PDF, the table of contents is hyperlinked to the relevant content section of the report.

10. Click on the **paperclip** icon next to a spreadsheet record to open the linked document.

11. In the message box asking if you would like to open the file or web site, click **OK** or **Allow**.

    The document or file opens in a new window and in its native source file application.

12. Click on the **paperclip** icon next to a spreadsheet record to open the linked document.

    An attachments pane displays on the left side of the window.

13. In the **Attachments** pane, double-click on the linked document or file you want to view.

    The document opens in a new window in its native application.

Related Topics

About creating reports
About printing reports
About ReportBooks

### *Managing ReportBooks*

ReportBook management is centrally located in the Manage ReportBooks dialog box, where you can create and print ReportBooks as well as copy, modify, and delete reports included in ReportBooks.

***Managing ReportBooks involves the following:***

- Renaming ReportBooks
- Copying ReportBooks
- Editing ReportBooks
- Deleting ReportBooks
- Deleting reports from a pre-existing ReportBooks

- Choosing to show/hide other users ReportBooks

For information on creating or modify ReportBooks, see Creating custom ReportBooks.

### ⊟ To rename a ReportBook

1. On the **Reports** tab, click **ReportBooks** and then click **Manage ReportBooks**.
2. In the **Manage ReportBooks** dialog box, select the ReportBook you want to rename in the **Available ReportBooks** box.
3. Click the **Rename** button.
4. In the **Rename ReportBook** dialog box, type in the new name for the ReportBook, then click **OK**.

   Notice that the new ReportBook name displays in alphabetical order in the Available ReportBooks box.

⚠ ReportBook name changes are visible by all users of the case. If you change the name of a pre-existing or widely used custom ReportBook, be certain to notify staff of the new ReportBook name.

### ⊟ To copy a ReportBook

1. On the **Reports** tab, click **ReportBooks** and then click **Manage ReportBooks**.
1. In the **Manage ReportBooks** dialog box, click on the ReportBook you want to copy in the **Available ReportBooks** box.
2. Click the **Copy** button.

   Notice that a copy of the selected ReportBook now displays in the Available ReportBooks box with "Copy of" in the title.

   You can now rename the ReportBook and modify it, as needed, to create a customized ReportBook.

### ⊟ To edit or modify a report or ReportBook

You can easily edit or modify a ReportBook or a report within a ReportBook.

For more information, see Creating custom ReportBooks.

### ⊟ To delete a ReportBook

1. On the **Reports** tab, click **ReportBooks** and then click **Manage ReportBooks**.
2. In the **Manage ReportBooks** dialog box, click on the ReportBook you want to copy in the **Available ReportBooks** box.
3. Click the **Delete** button.

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

   Notice that the ReportBook no longer displays in the Available ReportBooks box and is permanently removed from the case.

> ⚠ Before deleting a ReportBook from a case, you may want to export a copy and archive it with other case records. The only way to retrieve a deleted ReportBook is to restore it from a backup copy of the case.

### To delete a report from a pre-existing ReportBook

1. On the **Reports** tab, click **ReportBooks** and then click **Manage ReportBooks**.
2. In the **Manage ReportBooks** dialog box, click on the ReportBook you want to modify in the **Available ReportBooks** box.
3. Click the **Modify** button.
4. In the **Customizing ReportBook** dialog box, click the **Reports** button.
5. In the **ReportBook Reports** dialog box, select the report you want to remove from the ReporBook and then click the **Delete** button.
6. In the message box to confirm the deletion, click **Yes**.

   All selected reports are deleted from the ReportBook.
7. Click **OK** to save the changes.
8. Click **OK** to continue.
9. Click **Close** when you are finished.

> ⚠ Before deleting a report(s) from a ReportBook, you may want to export a copy of the report(s) and archive it with other case records. The only way to retrieve a deleted report included in a ReportBook is to restore it from a backup copy of the case.

### To hide other user's ReportBooks

When users in a case create, copy, rename or edit a ReportBook, the new ReportBooks are listed in the Manage ReportBooks dialog box for all users to view and use.

If you want to scale the listing down to view only pre-built ReportBooks and those created by you, select the Hide ReportBooks from other users check box.

Related Topics

About creating ReportBooks
Printing pre-built ReportBooks
Creating custom ReportBooks
Exporting/importing ReportBooks

## Hiding documents when printing

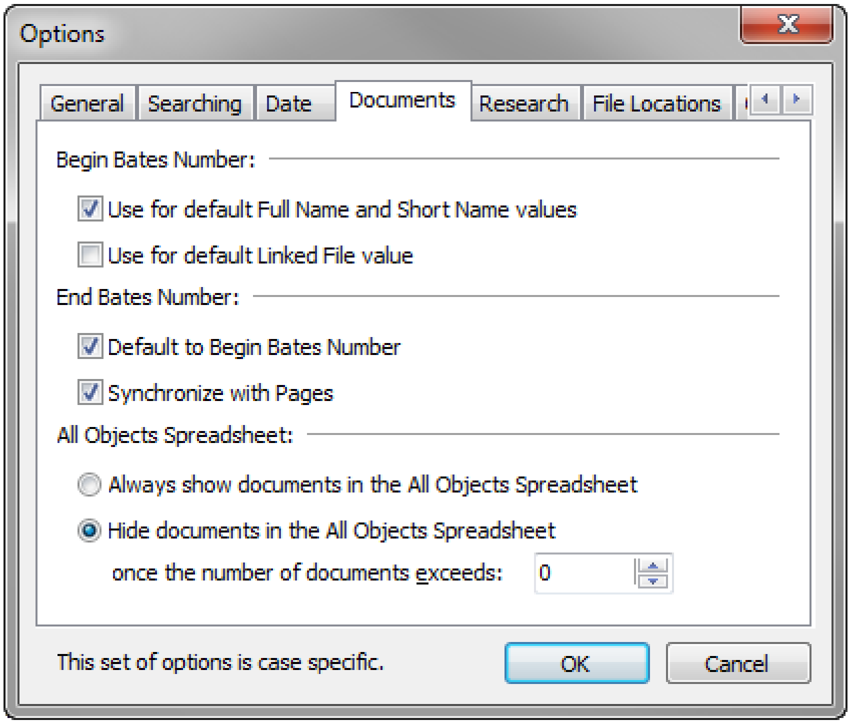
When starting a new case, you may want to print out a listing of all object short names for staff to reference when they begin working with case data. However, if you have hundreds or even thousands of documents included in the All Objects spreadsheet, you may want to omit them from printing.

### To hide document records from printing

1. On the **Case Shortcuts** pane, click the **All Objects** icon in the **All Shortcuts** pane to open this spreadsheet.

2. On the **File** menu, click **Options**.

3. In the **Options** dialog box, click the **Documents** tab.



Begin Bates Number:

☑ Use for default Full Name and Short Name values

☐ Use for default Linked File value

End Bates Number:

☑ Default to Begin Bates Number

☑ Synchronize with Pages

All Objects Spreadsheet:

○ Always show documents in the All Objects Spreadsheet

● Hide documents in the All Objects Spreadsheet

once the number of documents exceeds: 0

This set of options is case specific.

4. In the **All Objects Spreadsheet** area, select **Hide documents in the All Objects Spreadsheet**.

5. In the **once the number of documents exceeds** field, type in the number of documents that can print before the remaining records are omitted.

   You may want to leave the default setting as zero to ensure that all documents are hidden.

6. Click **OK** to continue.

7. In the message box to to close the case, click **OK**.

8. Close and re-open the case for the document setting to take effect.

9. Return to the **All Objects** spreadsheet and notice that all documents are now hidden from the spreadsheet.

   On the far right of the spreadsheet title bar, notice that the number of document records hidden is displayed.

10. Print the **All Objects** spreadsheet, as needed.

11. When you are finished, remember to reset the the **All Objects Spreadsheet** settings in the **File > Options > Documents** tab, and then close and re-open the case for the change to take effect.

Related Topics

About printing reports
Changing report print options
About short names

## Embedding linked documents in reports

Embedding linked documents in reports and ReportBooks printed to PDF files, allows you to share the report and supporting files with others who do not have access to CaseMap or the case. CaseMap will only embed files that are in the Linked Files field in object spreadsheets and the Authority and Extracts spreadsheet, or in the Source(s) field for the Facts spreadsheet.

Once the report is printed to PDF, spreadsheet records with linked documents or files will display a paperclip icon. Clicking the paperclip icon opens the linked document in a new window, in its native application.

You have the option to include redacted or original documents, and you can remove documents you do not want embedded, such as confidential documents or large files. Large files may slow the printing process and bloat the size of the report. CaseMap will display a message if the total file size exceeds 5 MB, allowing you the option to remove some files before printing. CaseMap remembers what documents you remove from the list of documents to embed in the report, so the next time you create a report those files will remain unchecked when you review the list.

### ⊟ To review report considerations with linked documents

Review the Report Considerations with Linked Documents table to learn more about using this feature.

## Report Considerations with Linked Documents

CaseMap must have read access to any embedded files saved locally or in a network folder.

Linked documents are embedded in their native file format; they are not converted to a PDF when the PDF report is printed.

If multiple spreadsheet records link to the same file, then the document will be embedded only once in the PDF report. Each spreadsheet record in the report will have a paperclip icon that links to the embedded file.

If a fact record has multiple documents linked to it, CaseMap will embed all linked documents and display multiple paperclips in the Facts spreadsheet. All other spreadsheets display one paperclip for linked files.

CaseMap will only embed files that are in the Linked Files field in object and research (authorities and extracts) spreadsheets or Source(s) field for the Facts spreadsheet.

CaseMap will toggle between display/non-display of the redaction reason on the printed output for embedded PDF reports and/or produced documents when the 'Display redaction reason' option is check/unchecked in the DocManager print option dialog box.

CaseMap will try to embed documents linked to document management system plug-ins, but does not support Concordance and TextMap.

CaseMap will stop displaying multiple paperclips for a report's spreadsheet record when the margin can no longer display any more. All documents will still be embedded in the report.

Paperclip icons do not correspond to the order that files are displayed in a spreadsheet field; paperclips display in a random order.

Paperclip display is dependent on the font size selected for print options. If the font size is too big, all paperclips may not display in the margin.

Images that CaseMap converts to OCR will be embedded as PDF files.

### ⊟ To embed linked documents in reports

1. Navigate to the **Documents** spreadsheet and click on/highlight the document that you want to print as a report.
2. Ensure that spreadsheet records are filtered and fields sorted to display the content you want in the report.

   Report content is What-You-See-Is-What-You-Get (WYSIWYG) based on your current spreadsheet view.
3. On the **Reports** menu, click **PDF**, and on the submenu, click **Print to PDF**.
4. In the **Save As PDF** dialog box, navigate to the folder where you want to save the report, type in a new file name, and then click **Save**.

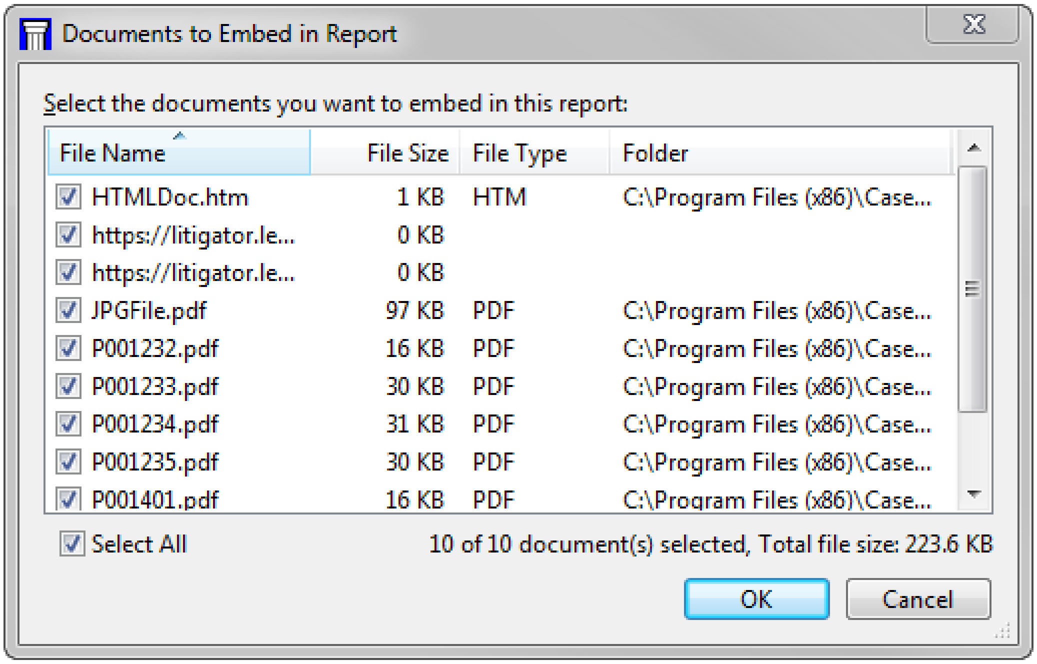
If the file already exist, click Yes to replace it, or click No, and repeat the step above.

5. In the message box, click **Yes** to continue without shrinking the field widths.

6. In the next message box, click **Yes** to embed copies of linked documents within the PDF report.

   If you select No, the linked documents are not embedded in the report and no paperclip icons display next to spreadsheet records.

7. In the **Documents to Embed in Report** dialog box, review the list of documents linked to the current spreadsheet's records.



Documents to Embed in Report

Select the documents you want to embed in this report:

| File Name | File Size | File Type | Folder |
|---|---|---|---|
| ☑ HTMLDoc.htm | 1 KB | HTM | C:\Program Files (x86)\Case... |
| ☑ https://litigator.le... | 0 KB | | |
| ☑ https://litigator.le... | 0 KB | | |
| ☑ JPGFile.pdf | 97 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001232.pdf | 16 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001233.pdf | 30 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001234.pdf | 31 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001235.pdf | 30 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001401.pdf | 16 KB | PDF | C:\Program Files (x86)\Case... |

☑ Select All

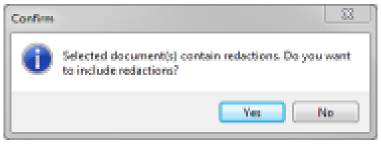
10 of 10 document(s) selected, Total file size: 223.6 KB

Documents are sorted by file name.

8. Optional: Clear the check box next to any document or file you want to remove from the list.

9. Click **OK** to continue.

10. In the redaction message box, click **Yes** to include redactions in the documents.



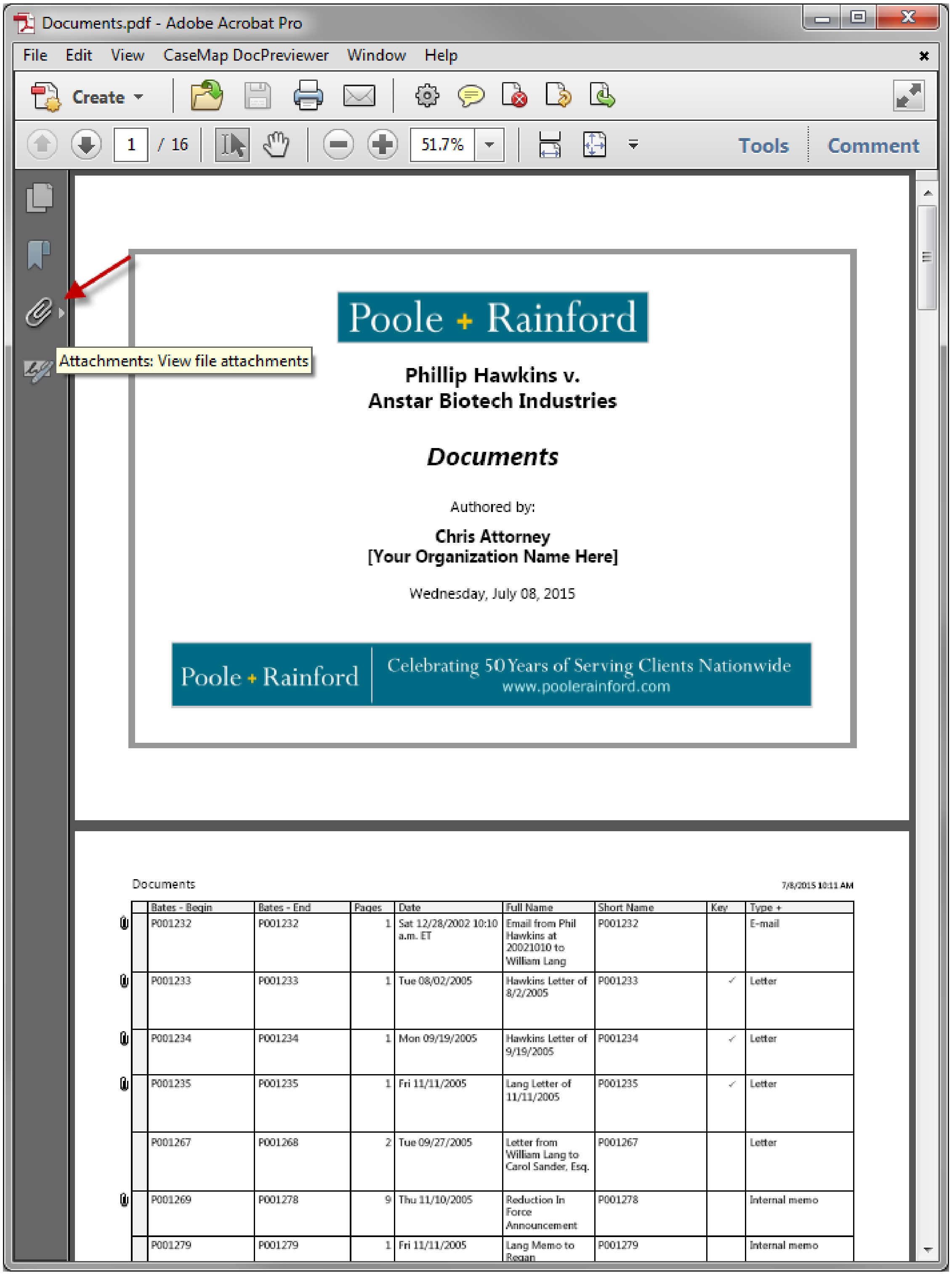
Confirm

Selected document(s) contain redactions. Do you want to include redactions?

11. In the message box, click **Yes** to open the document now, or click **No** to view it later.

12. In the message box asking to view the file now, click **Yes**.

13. When the report opens in Adobe Acrobat or Reader, navigate to a report page that contains spreadsheet records.


Documents.pdf - Adobe Acrobat Pro
File
Edit
View
CaseMap DocPreviewer
Window
Help
Create
1
/ 16
51.7%
Tools
Comment
Attachments: View file attachments

Poole + Rainford

Phillip Hawkins v.
Anstar Biotech Industries

*Documents*

Authored by:

**Chris Attorney**
**[Your Organization Name Here]**

Wednesday, July 08, 2015

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Documents

7/8/2015 10:11 AM

| | Bates - Begin | Bates - End | Pages | Date | Full Name | Short Name | Key | Type + |
|---|---|---|---|---|---|---|---|---|
| 📎 | P001232 | P001232 | 1 | Sat 12/28/2002 10:10 a.m. ET | Email from Phil Hawkins at 20021010 to William Lang | P001232 | | E-mail |
| 📎 | P001233 | P001233 | 1 | Tue 08/02/2005 | Hawkins Letter of 8/2/2005 | P001233 | ✓ | Letter |
| 📎 | P001234 | P001234 | 1 | Mon 09/19/2005 | Hawkins Letter of 9/19/2005 | P001234 | ✓ | Letter |
| 📎 | P001235 | P001235 | 1 | Fri 11/11/2005 | Lang Letter of 11/11/2005 | P001235 | ✓ | Letter |
| | P001267 | P001268 | 2 | Tue 09/27/2005 | Letter from William Lang to Carol Sander, Esq. | P001267 | | Letter |
| 📎 | P001269 | P001278 | 9 | Thu 11/10/2005 | Reduction In Force Announcement | P001278 | | Internal memo |
| | P001279 | P001279 | 1 | Fri 11/11/2005 | Lang Memo to Regan | P001279 | | Internal memo |

14. Click on the **paperclip** icon next to a spreadsheet record to open the linked document.

    An attachments pane displays on the left side of the window.

15. In the **Attachments** pane, double-click on the linked document or file you want to review.

    The document opens in a new window in its native application.

### To embed linked documents in ReportBooks

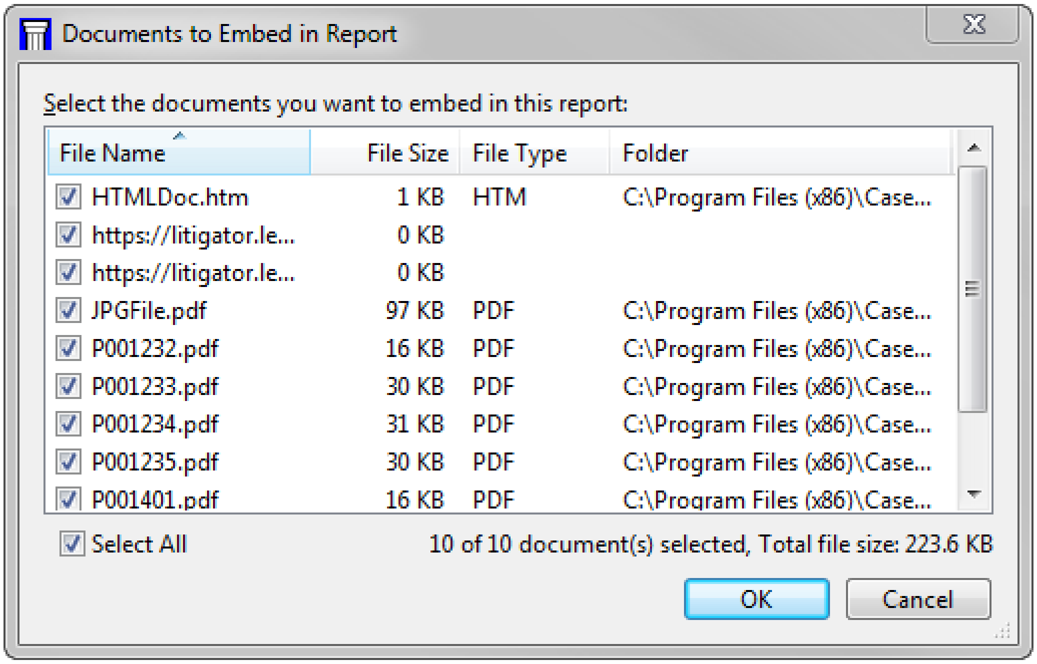
1. On the **Reports** menu, click **ReportBooks**.
2. On the submenu, click the ReportBook you want to print, and then click **Save as PDF**.
3. In the **Save As PDF** dialog box, navigate to the folder where you want to save the report, type in a new file name, and then click **Save**.

   If the file already exist, click Yes to replace it, or click No, and repeat the step above.

4. In the message box, click **Yes** to embed copies of linked documents within the PDF report.

   If you select No, the linked documents are not embedded in the report and no paperclip icons display next to spreadsheet records.

5. In the **Documents to Embed in Report** dialog box, review the list of documents linked to the current spreadsheet's records.



Select the documents you want to embed in this report:

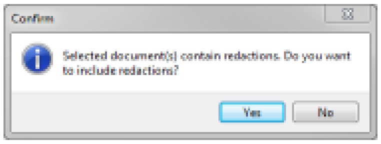
| File Name | File Size | File Type | Folder |
|---|---|---|---|
| ☑ HTMLDoc.htm | 1 KB | HTM | C:\Program Files (x86)\Case... |
| ☑ https://litigator.le... | 0 KB | | |
| ☑ https://litigator.le... | 0 KB | | |
| ☑ JPGFile.pdf | 97 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001232.pdf | 16 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001233.pdf | 30 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001234.pdf | 31 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001235.pdf | 30 KB | PDF | C:\Program Files (x86)\Case... |
| ☑ P001401.pdf | 16 KB | PDF | C:\Program Files (x86)\Case... |

☑ Select All

10 of 10 document(s) selected, Total file size: 223.6 KB

   Documents are sorted by file name.

6. Optional: Clear the check box next to any document or file you want to remove from the list.
7. In the redaction message box, click **Yes** to include redactions in the documents.



Selected document(s) contain redactions. Do you want to include redactions?

8. In the message box, click **Yes** to open the document now, or click **No** to view it later.

9. When the report opens in Adobe Acrobat or Reader, navigate to a report page that contains spreadsheet records.

   When a ReportBook is printed to PDF, the table of contents is hyperlinked to the relevant content section of the report.

10. Click on the **paperclip** icon next to a spreadsheet record to open the linked document.

11. In the message box asking if you would like to open the file or web site, click **OK** or **Allow**.

    The document or file opens in a new window and in its native source file application.

12. Click on the **paperclip** icon next to a spreadsheet record to open the linked document.

    An attachments pane displays on the left side of the window.

13. In the **Attachments** pane, double-click on the linked document or file you want to view.

    The document opens in a new window in its native application.

Related Topics

About creating reports
About printing reports
About ReportBooks

## Batch printing linked documents

The Batch Printing Wizard allows you to print documents linked to an objects spreadsheet, research spreadsheets (Authorities and Extracts from Authorities spreadsheets), and the Facts spreadsheet. You must be viewing the spreadsheet from which you want to print documents before the batch printing options are enabled. You can only batch print from one spreadsheet at a time. You must have permission to save files to a selected folder when printing to PDF or TIFF.

***Batch printing options include:***

- Wizard to Printer
- Wizard to PDF
- Wizard to TIFF

***The Batch Print Wizard allows you to:***

- Review documents in the batch, and remove any you do not want to print
- Select color and annotation options
- Choose your printed output

### To review batch printing considerations

Review the Batch Printing Considerations table to learn more about using this feature.

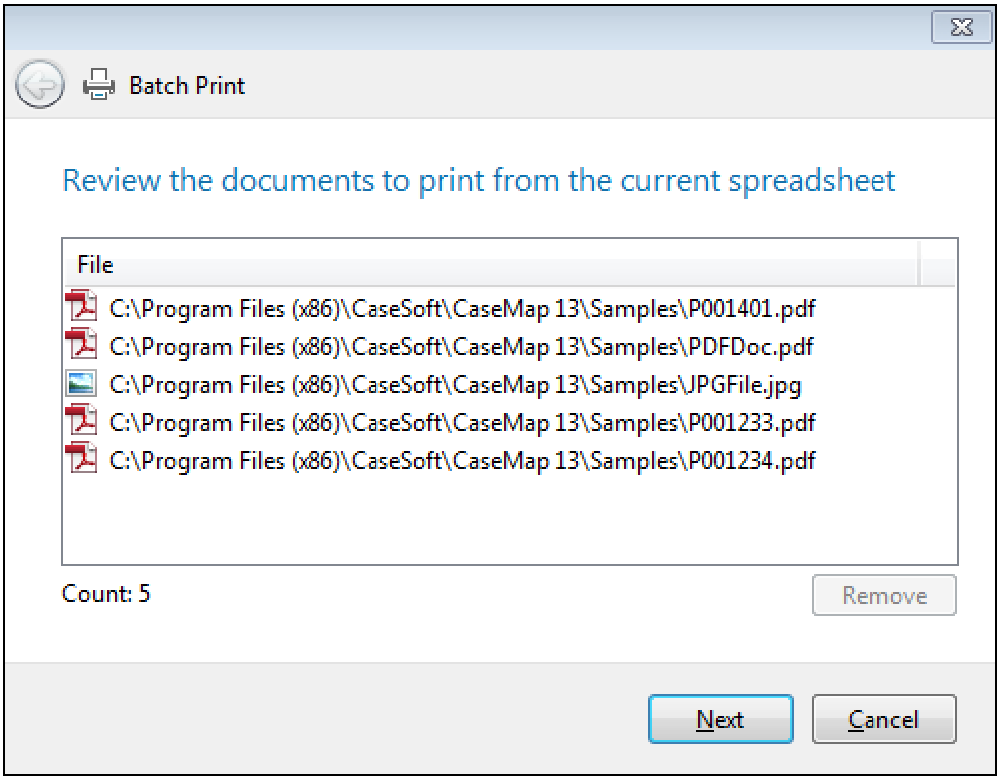
| Batch Printing Considerations |
|---|
| **General** |
| When printing from the Facts spreadsheets, CaseMap loads all documents for any object linked to a fact record into the batch for printing. |
| When printing from an objects or research spreadsheet, CaseMap loads all documents in the Linked File field into the batch for printing. If an object is linked to multiple facts, the document is only selected once for printing. |
| If any filters or searches are currently running in a spreadsheet, CaseMap loads only those documents linked to records in the current spreadsheet view. |
| Files print in the order they display on the selected spreadsheet (as opposed to file name order). When printing from the Facts spreadsheet, files print in the order they first display. If a document is linked to a fact record multiple times, it will only be selected once for printing. If multiple documents are linked to a single fact, the documents will be listed in a random order in the Batch Print Wizard. |
| **Printer, PDF, or TIFF** |
| Burning annotations as a permanent part of the image prints the annotations in color into the Printer, PDF, or TIFF file. |
| Printing annotation notes in the Printer, 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 when the annotations were applied. The color selected for printing applies to all annotations in the document batch. For example, if users apply annotations using green and pink colors and yellow is selected as the annotation print color, then all annotations will print highlighted in yellow. |
| Case staff must have permission to save files to a selected folder when printing to Printer, PDF, or TIFF. If they do not have folder permissions, users should select another folder or contact their system administrator for assistance. |

### To batch print to a printer

1. On the **Reports** ribbon, select **Batch Print**.

2. On the submenu, click **To Printer**.

3. In the **Review the documents to print from the current spreadsheet** dialog box, review the documents you want to print from the current spreadsheet.



Review the documents to print from the current spreadsheet

| File |
|---|
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001401.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\PDFDoc.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\JPGFile.jpg |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001233.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001234.pdf |

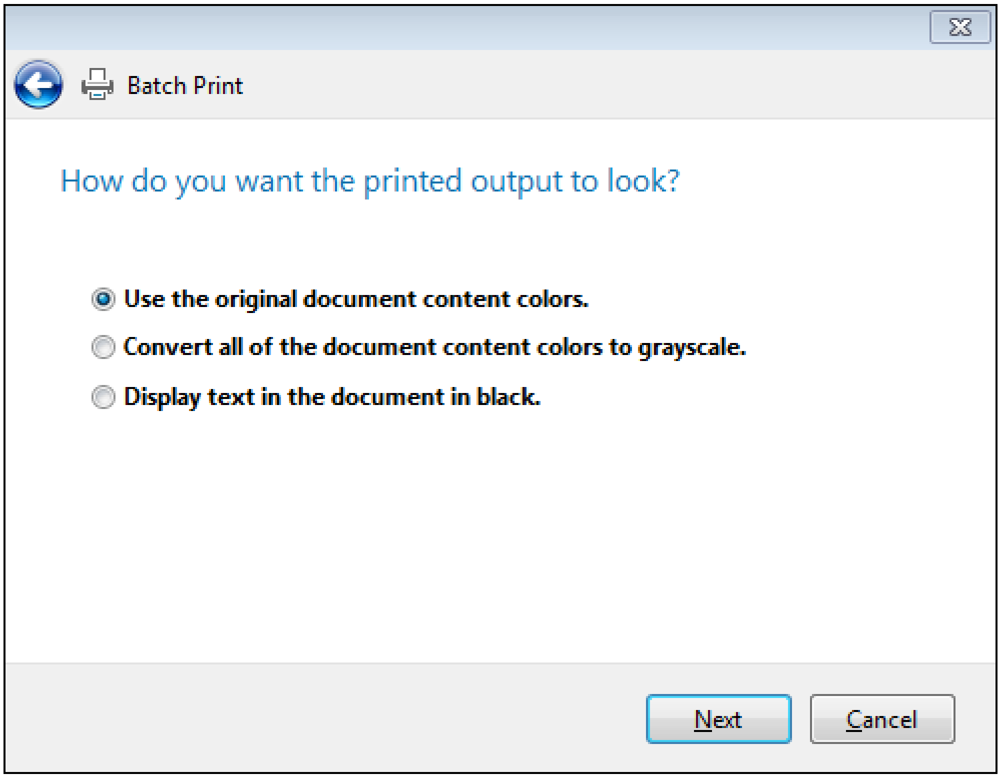
Count: 5

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

4. Click **Next** to continue.

5. In the **How do you want the printed output to look** dialog box, select a document content color option:

   - Use the original document content colors
   - Convert all of the document content colors to grayscale
   - Display text in the document in black

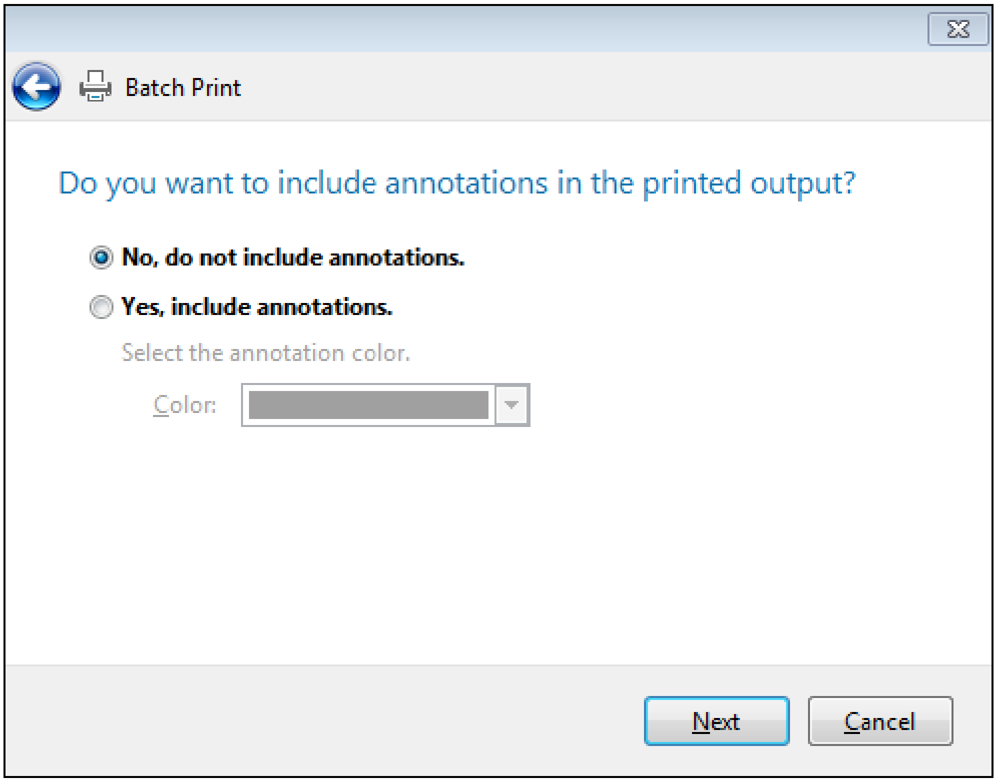


How do you want the printed output to look?

● Use the original document content colors.
○ Convert all of the document content colors to grayscale.
○ Display text in the document in black.

6. Click **Next** to continue.

7. In the **Do you want to include annotations in the printed output** dialog box, select whether you want to print annotations, and then click **Next** to continue.



Do you want to include annotations in the printed output?

● No, do not include annotations.

○ Yes, include annotations.

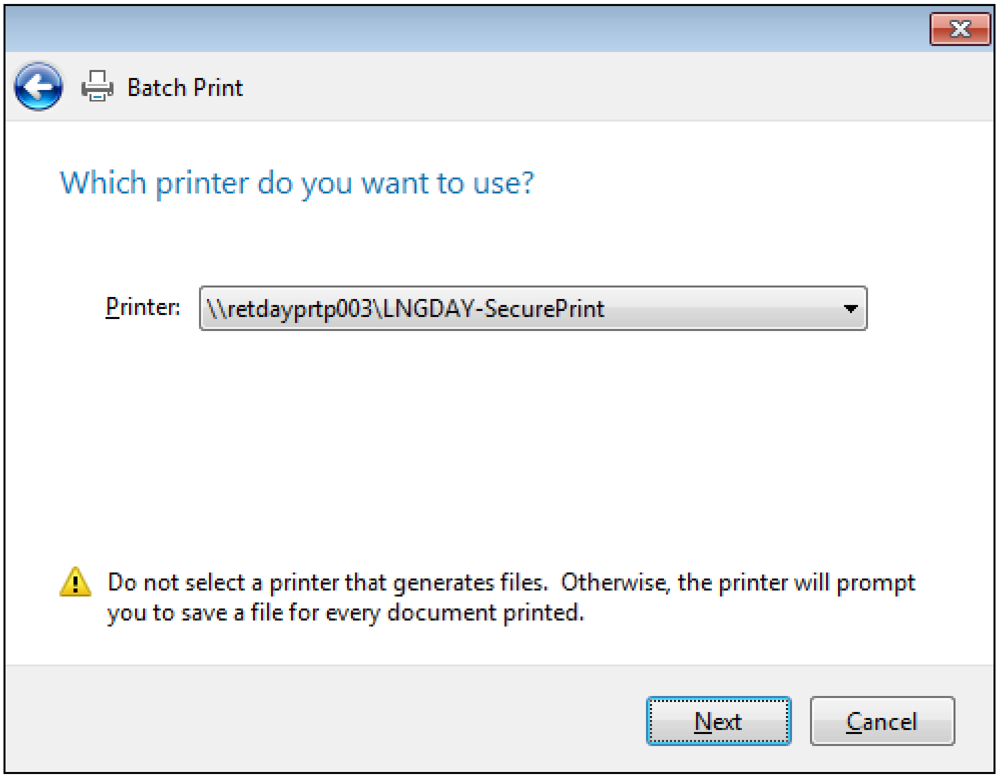
Select the annotation color.

Color:

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

8. Click **Next** to continue.

9. In the **Which printer do you want to use** dialog box, select the printer you want to use in the **Printer** list.



Which printer do you want to use?

Printer: \\retdayprtp003\LNGDAY-SecurePrint

Do not select a printer that generates files. Otherwise, the printer will prompt you to save a file for every document printed.

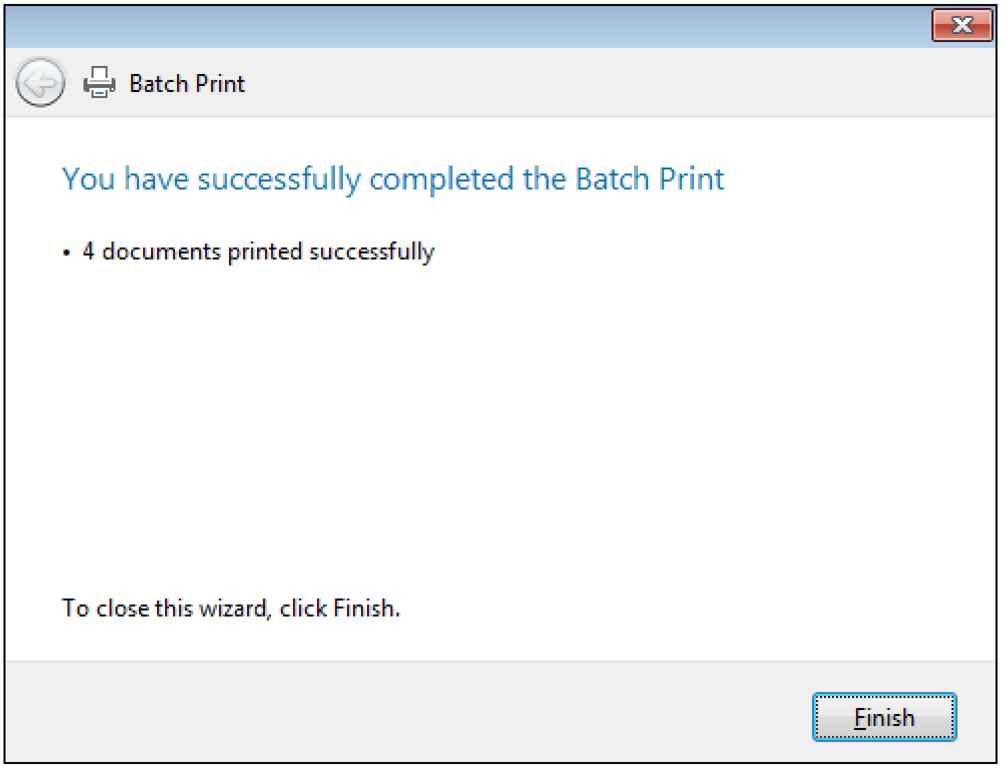
Do not select a printer that generates files. Otherwise, the printer will prompt you to save a file for every document printed.

10. Click **Next** to continue.

11. Review your selected options and click **Next**.

    Please wait while printing is completed.

12. Review the number of documents that printed successfully, and then click **Finish**.



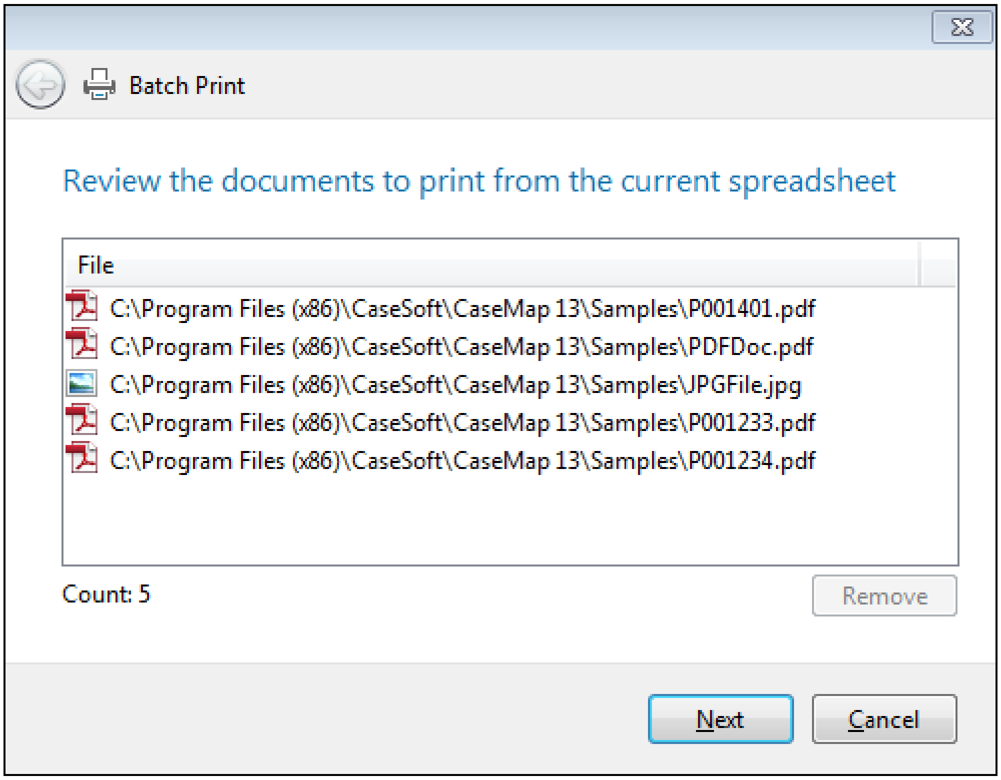
You have successfully completed the Batch Print

- 4 documents printed successfully

To close this wizard, click Finish.

## ⊟ To batch print to PDF

1. On the **Reports** menu, select **Batch Print**, and then click **To PDF**.
2. In the **Review Documents** dialog box, review the documents you want to print from the current spreadsheet.



Review the documents to print from the current spreadsheet

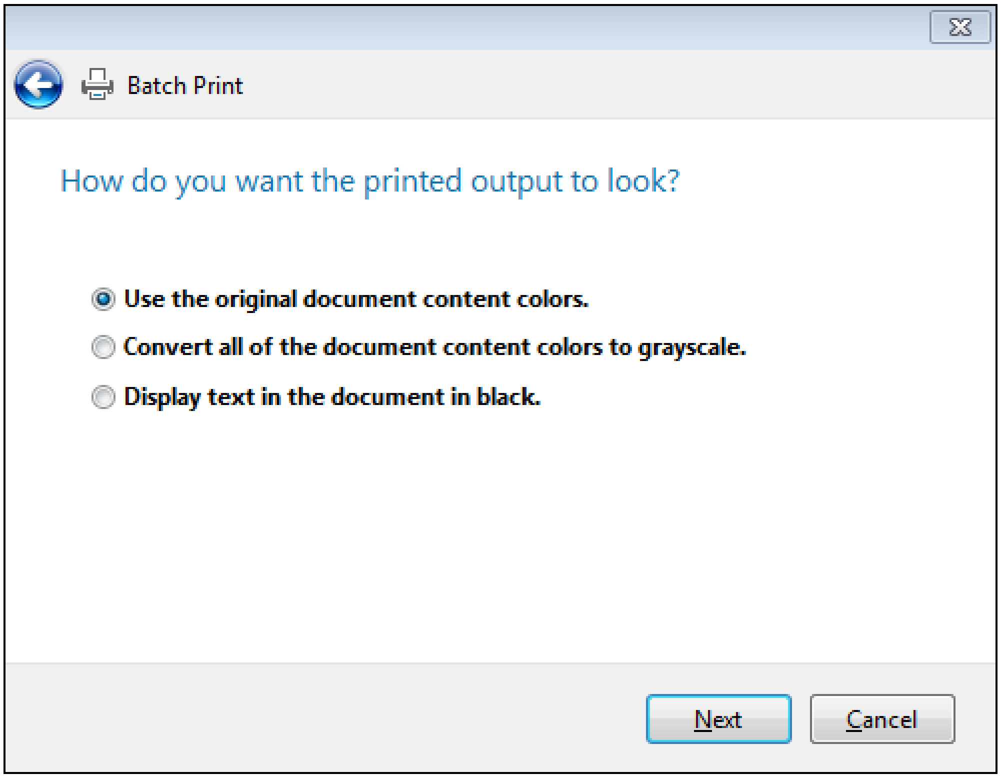
| File |
|---|
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001401.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\PDFDoc.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\JPGFile.jpg |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001233.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001234.pdf |

Count: 5

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

3. Click **Next** to continue.

4. In the **Document Content Colors** dialog box, select a document content color option:
   - Use the original document content colors
   - Convert all of the document content colors to grayscale
   - Display text in the document in black



How do you want the printed output to look?

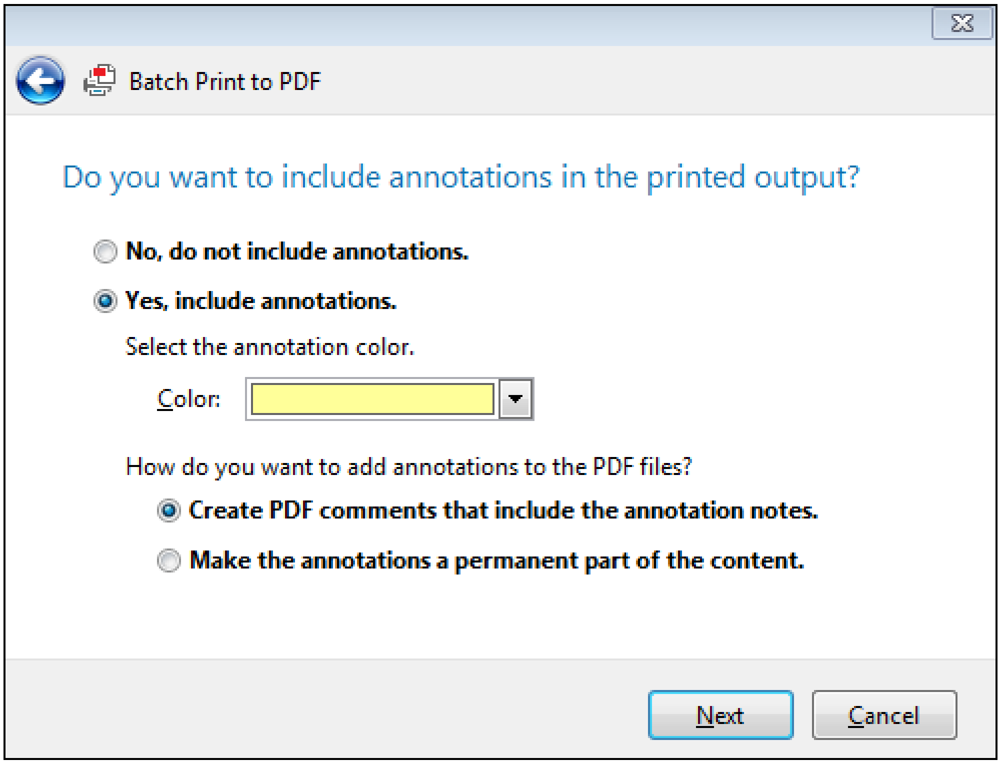
● Use the original document content colors.

○ Convert all of the document content colors to grayscale.

○ Display text in the document in black.

5. Click **Next** to continue.

6. In the **Do you want to include annotations in the printed output** dialog box, select whether you want to print annotations, and then click **Next** to continue.



Batch Print to PDF

Do you want to include annotations in the printed output?

○ No, do not include annotations.

● Yes, include annotations.

Select the annotation color.

Color: 🟨

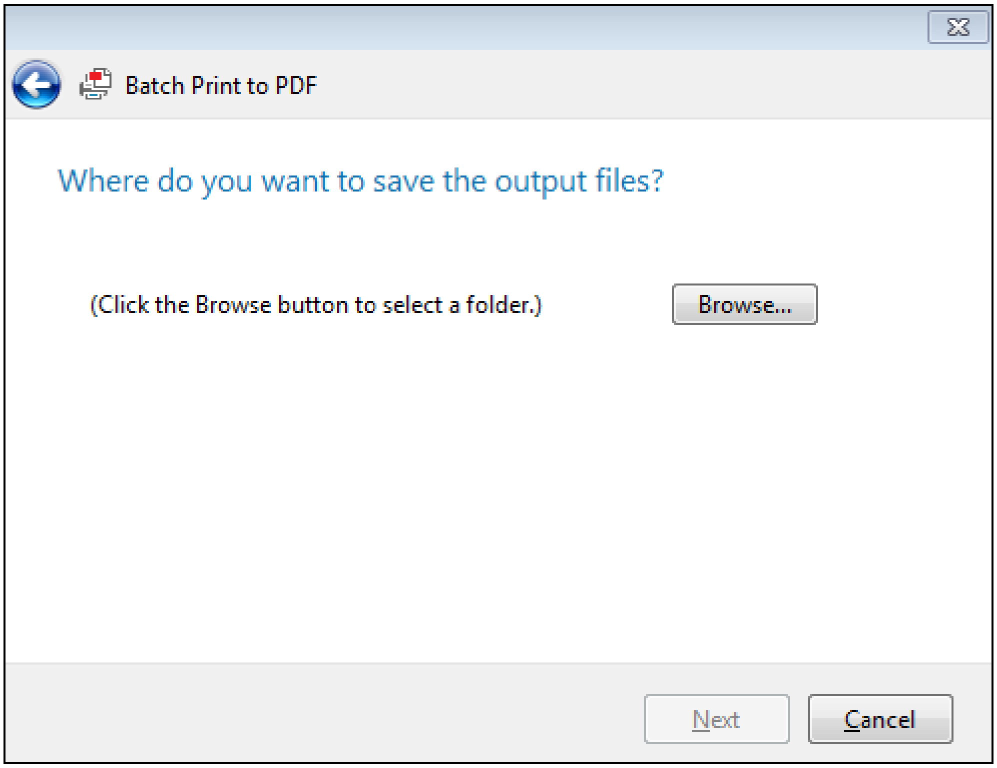
How do you want to add annotations to the PDF files?

● Create PDF comments that include the annotation notes.

○ Make the annotations a permanent part of the content.

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

7. Optional: Select how you want to add annotations to the PDF files:
    - Create PDF comments that include annotation notes
    - Make the annotations a permanent part of the content
8. Click **Next** to continue.
9. In the **Where do you want to save the output files** dialog box, click the **Browse** button to navigate to the network folder where you want the files saved, and then click **OK**.



Where do you want to save the output files?

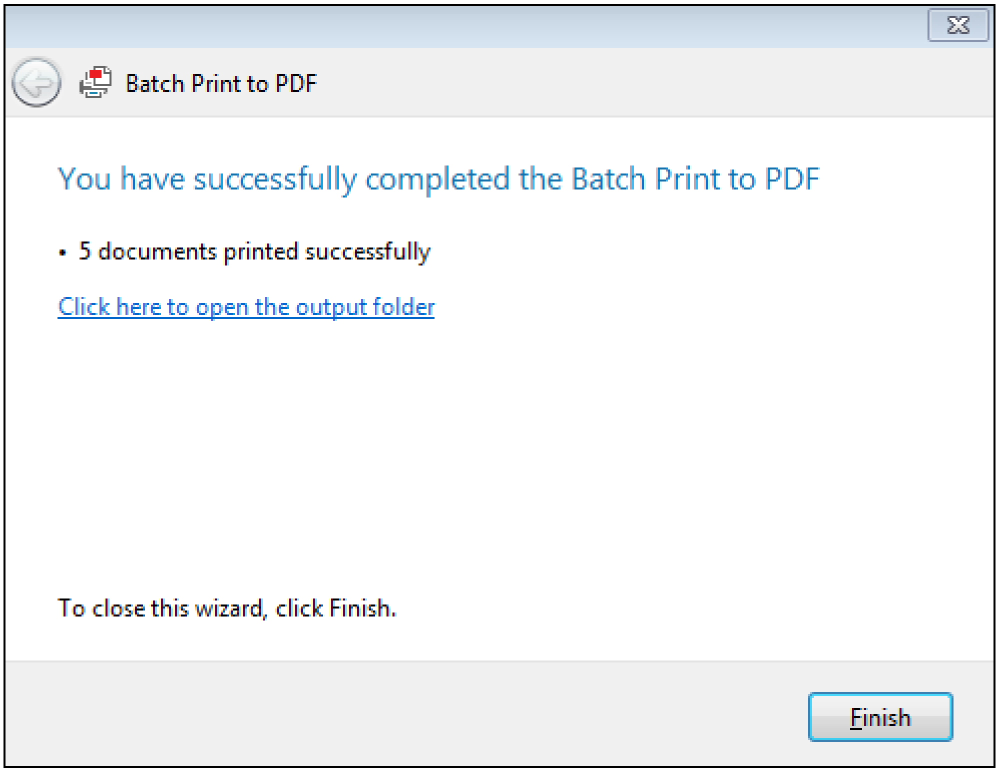
(Click the Browse button to select a folder.)

10. Click **Next** to continue.

11. In the **Review your selected options** dialog box, review your selected options, then click **Next**.

    Please wait while the printing is completed.

12. In the **Complete** box, review the number of documents that printed successfully.



You have successfully completed the Batch Print to PDF

- 5 documents printed successfully

Click here to open the output folder

To close this wizard, click Finish.

13. Optional: Click the link **Click here to open the output folder** to review the printed output.

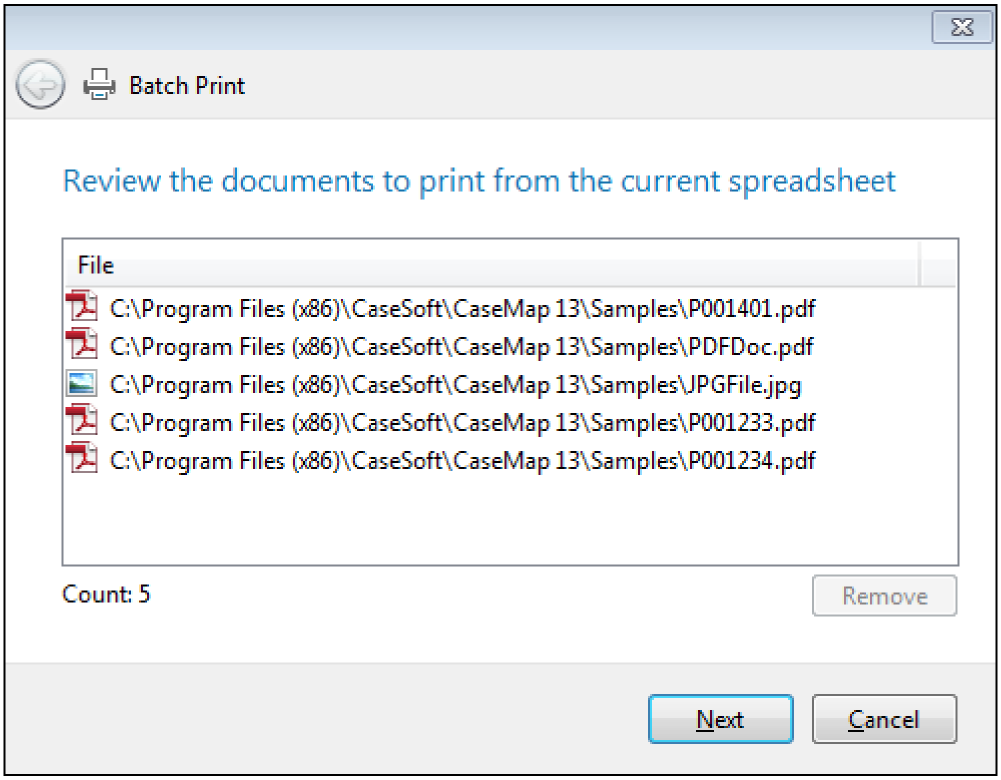
14. Click **Finish** to close the wizard.

### ⊟ To batch print to TIFF

1. On the **Reports** menu, select **Batch Print Wizard**.

2. On the submenu, click **To TIFF**.

3. In the **Review Documents** dialog box, review the documents you want to print from the current spreadsheet.



Review the documents to print from the current spreadsheet

| File |
|---|
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001401.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\PDFDoc.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\JPGFile.jpg |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001233.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001234.pdf |

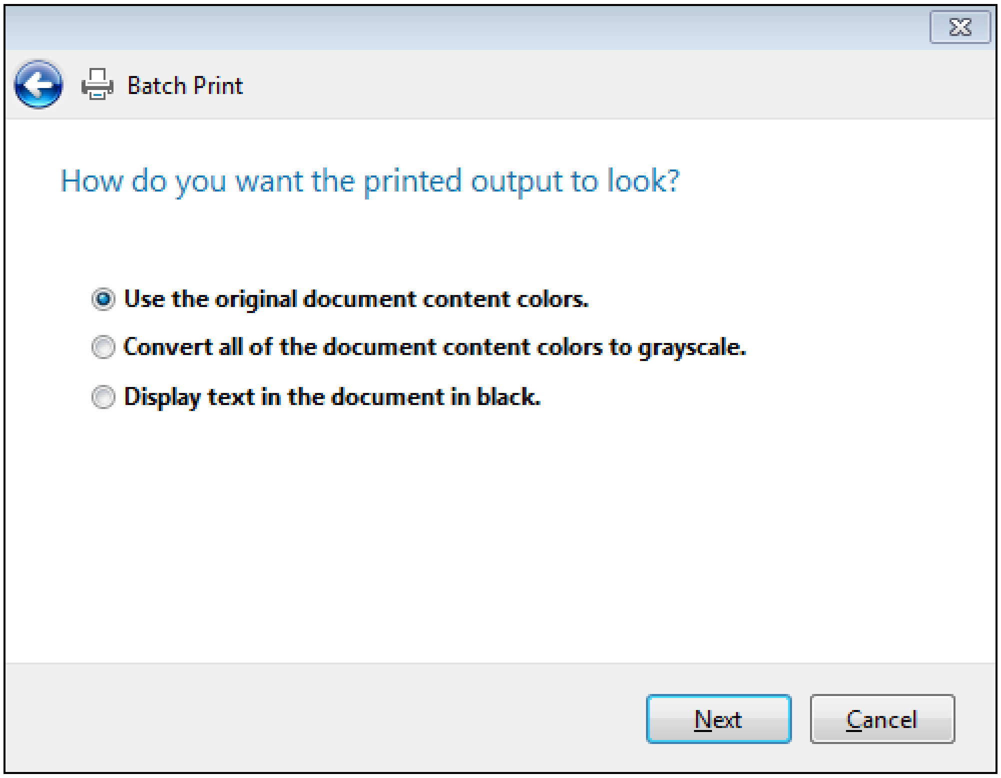
Count: 5

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

4. Click **Next** to continue.

5. In the **How do you want the printed output to look** dialog box, select a document content color option:

   - Use the original document content colors
   - Convert all of the document content colors to grayscale
   - Display text in the document in black



Batch Print

How do you want the printed output to look?

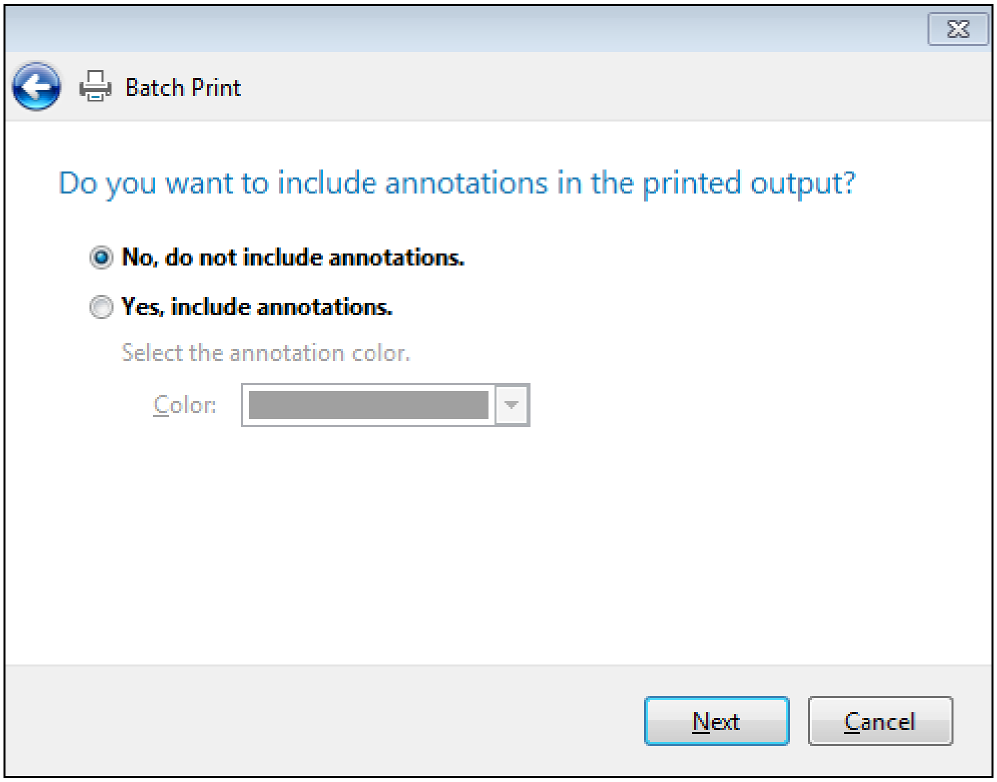
● Use the original document content colors.

○ Convert all of the document content colors to grayscale.

○ Display text in the document in black.

6. Click **Next** to continue.

7. In the **Do you want to include annotations in the printed output** dialog box, select whether you want to print annotations, and then click **Next** to continue..



Batch Print

Do you want to include annotations in the printed output?

● No, do not include annotations.

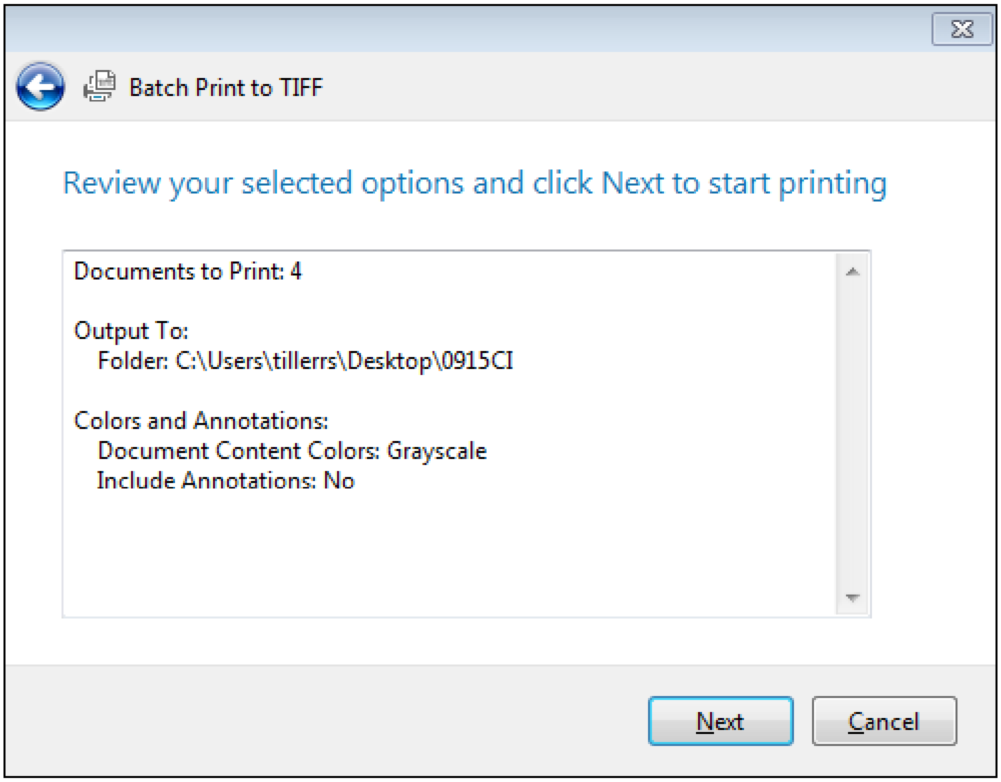
○ Yes, include annotations.

Select the annotation color.

Color:

If Yes, click on the color for which you want annotations to print in the Color list, and then click **Next** to continue.

8. In the **Where do you want to save the output files** dialog box, click the **Browse** button to navigate to the network folder where you want the files saved, and click **OK**.



Review your selected options and click Next to start printing

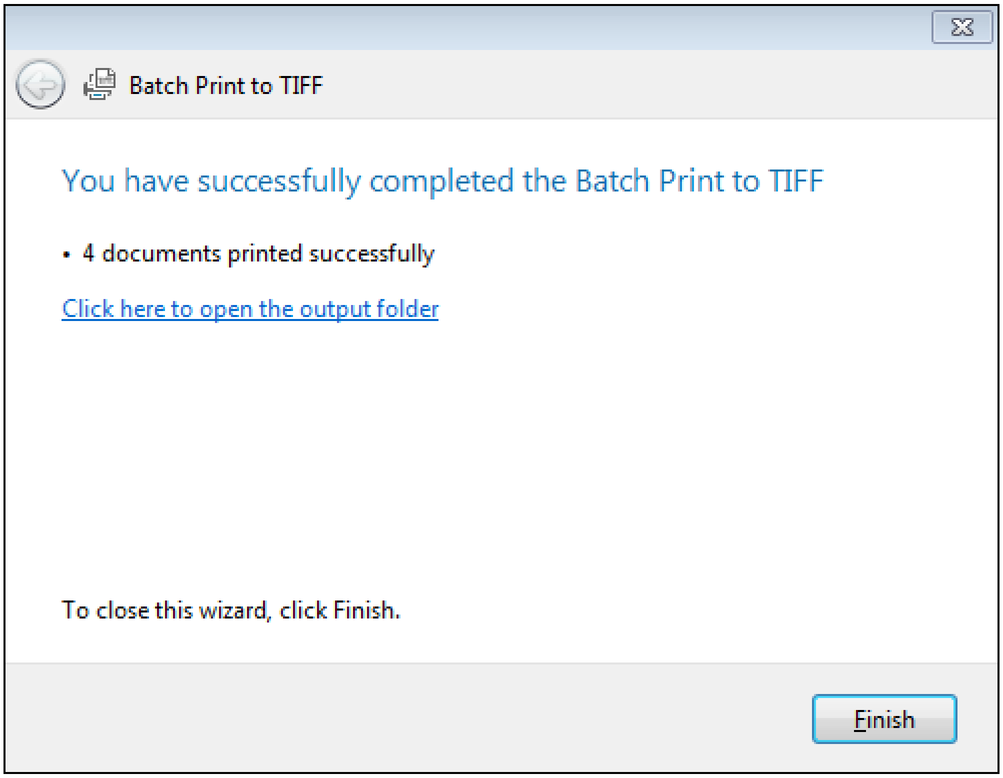
Documents to Print: 4

Output To:
Folder: C:\Users\tillerrs\Desktop\0915CI

Colors and Annotations:
Document Content Colors: Grayscale
Include Annotations: No

9. Click **Next** to continue.
10. In the **Review your selected options and click Next to start printing** dialog box, review your selected options, then click **Next**.

    Please wait while the printing is completed.
11. Review the number of documents that printed successfully.



You have successfully completed the Batch Print to TIFF

- 4 documents printed successfully

Click here to open the output folder

To close this wizard, click Finish.

12. Optional: Click the link **Click here to open the output folder** to review the printed output.

13. Click **Finish** to close the wizard.

Related Topics

About printing reports
Hiding documents when printing
Embedding linked documents in reports
Batch printing linked PDFs
Importing linked files
Docking and undocking the DocManager

## Batch printing linked PDFs

The Batch Print PDFs tool allows you to print a set of PDFs in a spreadsheet that were linked using the Send to CaseMap utility in CaseMap. Documents that were manually linked to records in a spreadsheet will not be included. Only spreadsheets with linked documents (e.g., Documents) will be printed. The Batch Print PDFs feature can be accessed from Reports ribbon > Batch Print.

The Batch Print Wizard allows you to select which files you want to print and includes color and annotation print options. See About DocManager and Batch printing linked documents.

You must have Adobe® Acrobat v6.0+ (Standard or Professional) installed on the same computer as CaseMap to use this tool. This feature is not available to use with Adobe® Reader.

We recommend you use this feature only when you really need to print all selected documents at one time. The printer selected may be tied up printing hundreds of pages and other staff may not have access to it for some time. Be certain your printer has adequate paper and ink to accommodate the number of pages being printed. And alert other staff prior to printing. For an alternative print option, see Embedding linked documents in reports.

The Batch Print Wizard allows you to select which files you want to print and includes color and annotation print options. See About DocManager and Batch printing linked documents.

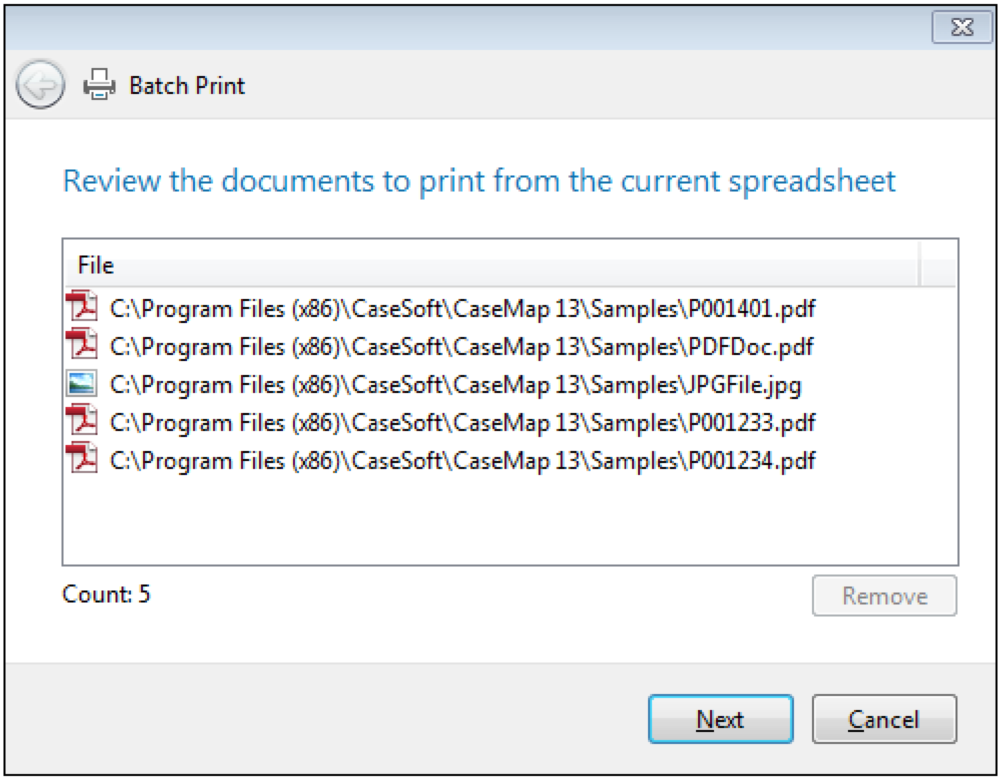
### ⊟ To batch print in CaseMap

1. In the **Case Shortcuts** pane, click on the **Documents** spreadsheet in the **All Shortcuts** task pane.
2. On the **Reports** ribbon, click **Batch Print**, and then select one the following options**:**

#### ⊟ To Printer

   a. When the **Batch Print Wizard** launches, click **Next**.

   b. In the **Review Documents** dialog box, review the documents you want to print from the current spreadsheet.



Review the documents to print from the current spreadsheet

| File |
|---|
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001401.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\PDFDoc.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\JPGFile.jpg |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001233.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001234.pdf |

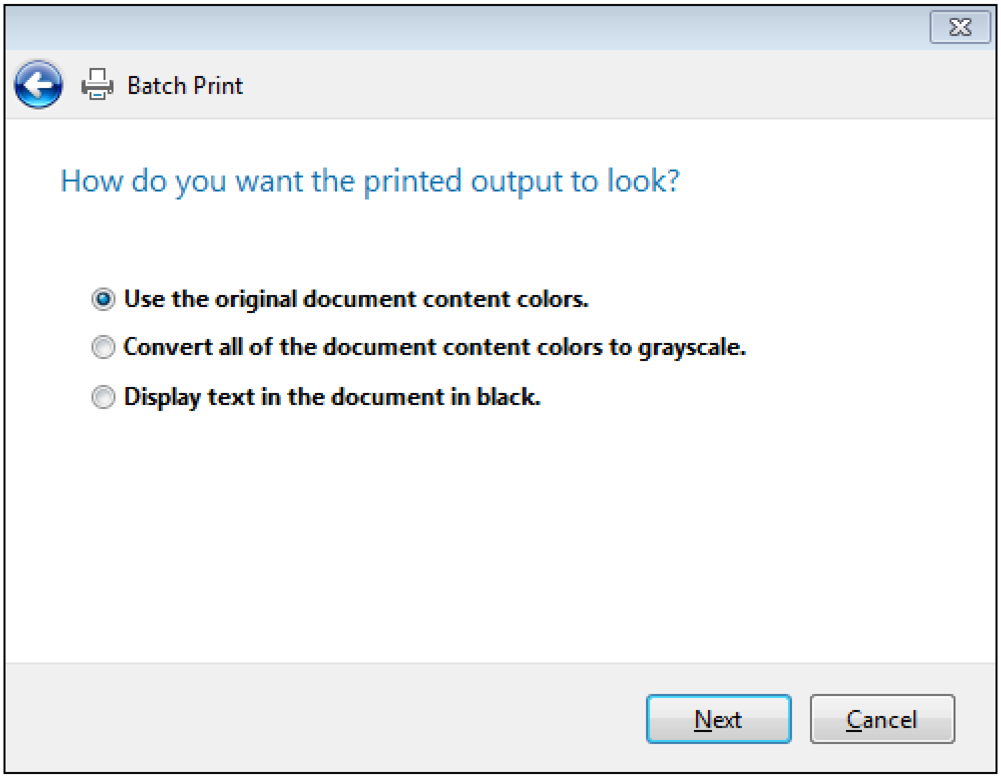
Count: 5

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

c. Click **Next** to continue.

d. In the **Document Content Colors** dialog box, select a document content color option:

- Use the original document content colors
- Convert all of the document content colors to grayscale
- Display text in the document in black



How do you want the printed output to look?

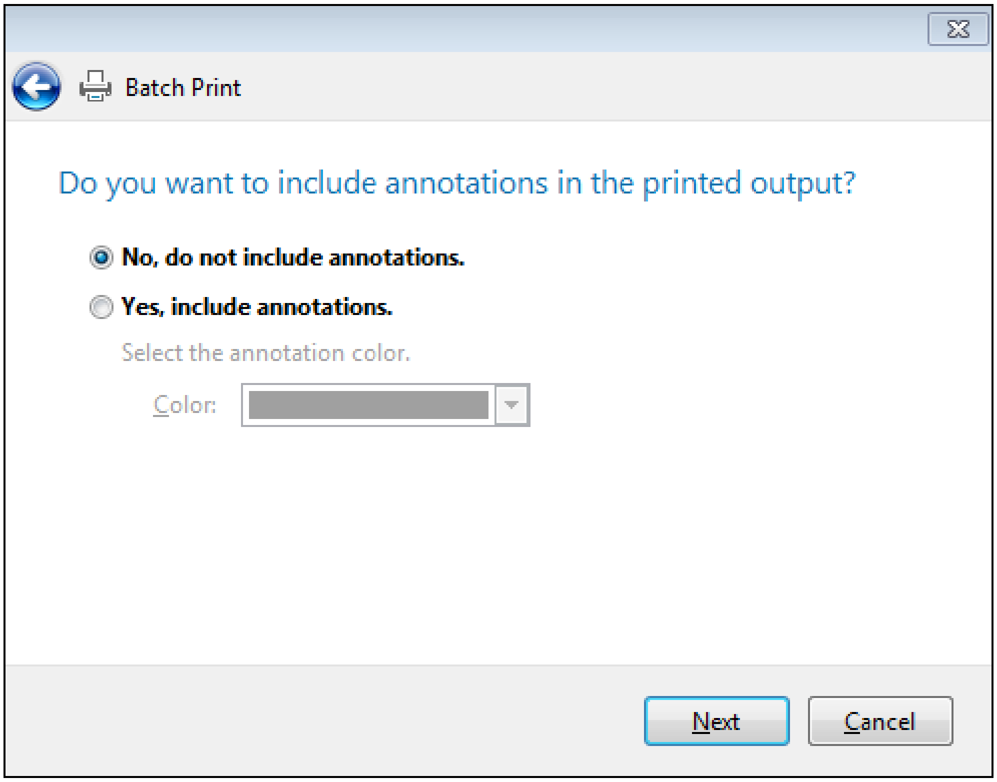
● Use the original document content colors.

○ Convert all of the document content colors to grayscale.

○ Display text in the document in black.

e. Click **Next** to continue.

f. In the **Annotations** dialog box, select whether you want to print annotations, and then click **Next** to continue.



Do you want to include annotations in the printed output?

● No, do not include annotations.

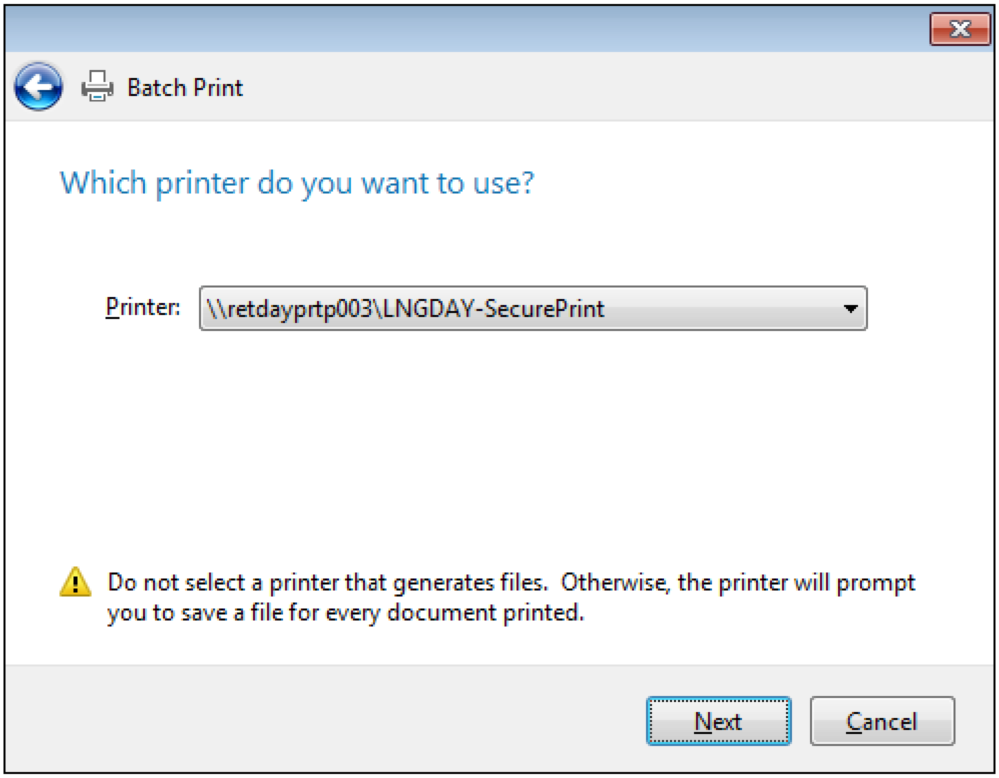
○ Yes, include annotations.

Select the annotation color.

Color:

If Yes, click on the color for which you want annotations to print in the Color list, and then click **Next** to continue.

g. In the **Output Destination** dialog box, select the printer you want to use in the **Printer** list.



Which printer do you want to use?

Printer: \\retdayprtp003\LNGDAY-SecurePrint

Do not select a printer that generates files. Otherwise, the printer will prompt you to save a file for every document printed.

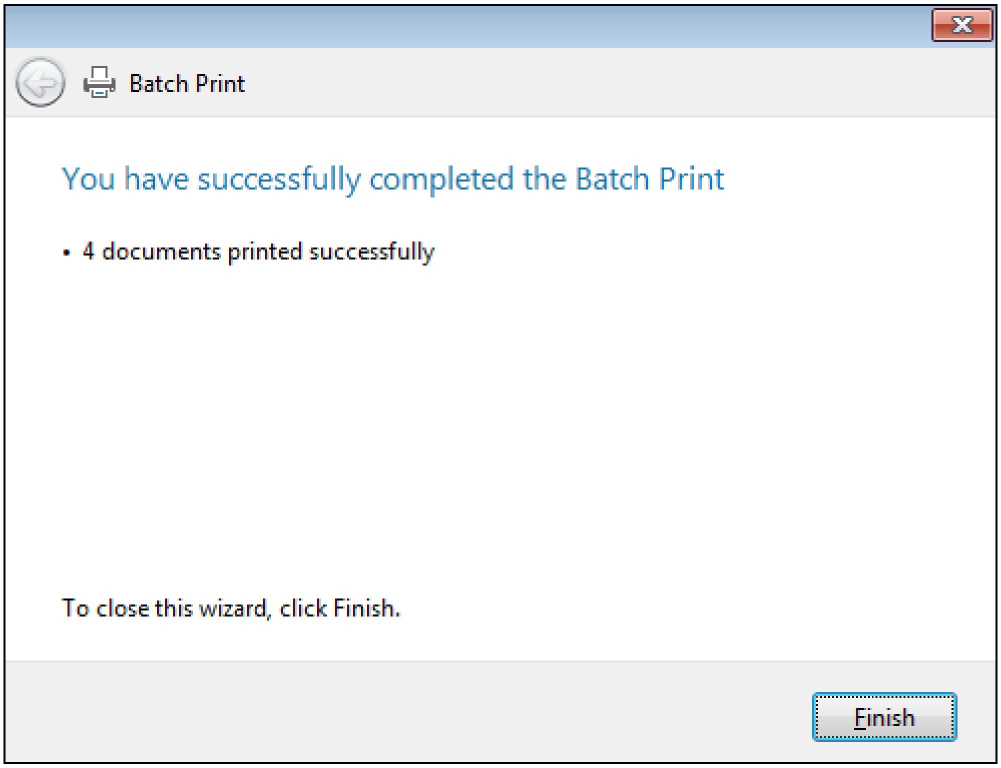
Do not select a printer that generates files. Otherwise, the printer will prompt you to save a file for every document printed.

h. Click **Next** to continue.

i. In the **Review Options and Start** dialog box, review your selected options, then click **Next**.

   Please wait.

j. In the **Complete** dialog box, review the number of documents that printed successfully, then click **Finish**.



You have successfully completed the Batch Print

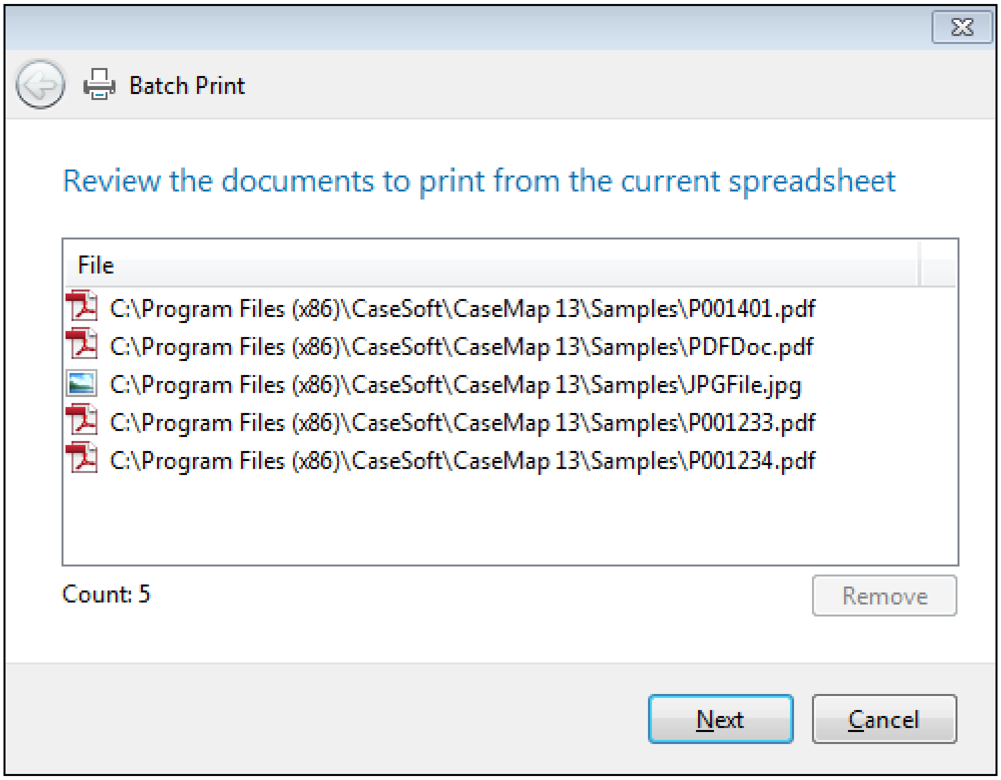
- 4 documents printed successfully

To close this wizard, click Finish.

⊟ To PDF

a. When the **Batch Print Wizard** launches, click **Next**.

b. In the **Review Documents** dialog box, review the documents you want to print from the current spreadsheet.



Review the documents to print from the current spreadsheet

| File |
|---|
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001401.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\PDFDoc.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\JPGFile.jpg |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001233.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001234.pdf |

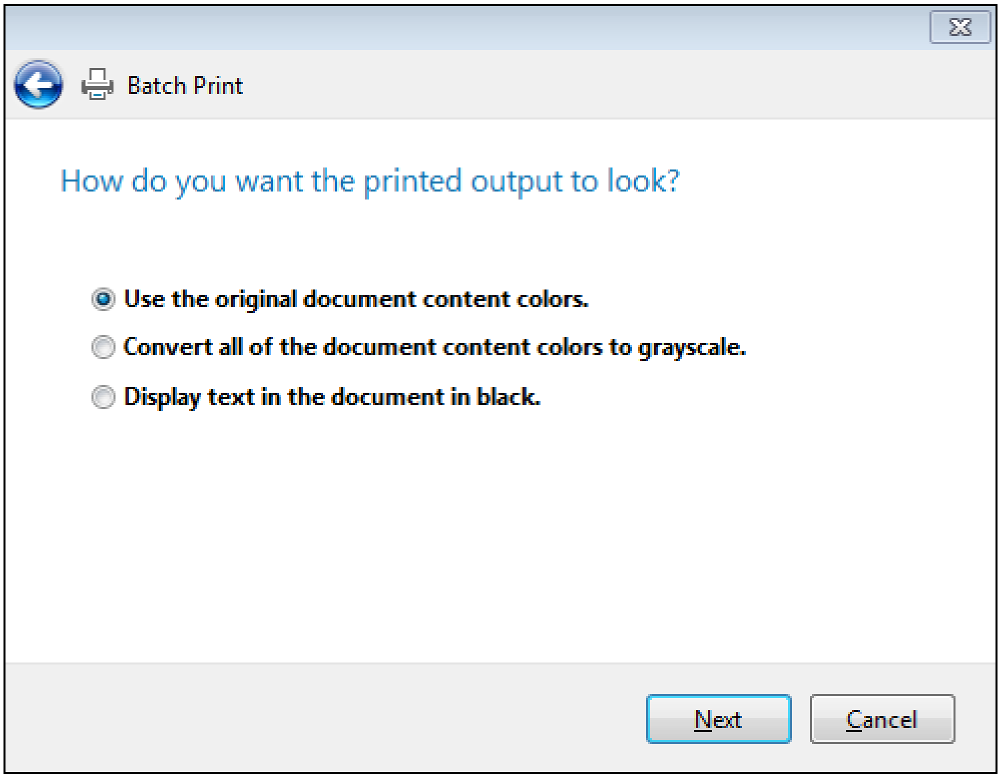
Count: 5

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

c. Click **Next** to continue.

d. In the **Document Content Colors** dialog box, select a document content color option:

- Use the original document content colors
- Convert all of the document content colors to grayscale
- Display text in the document in black



How do you want the printed output to look?

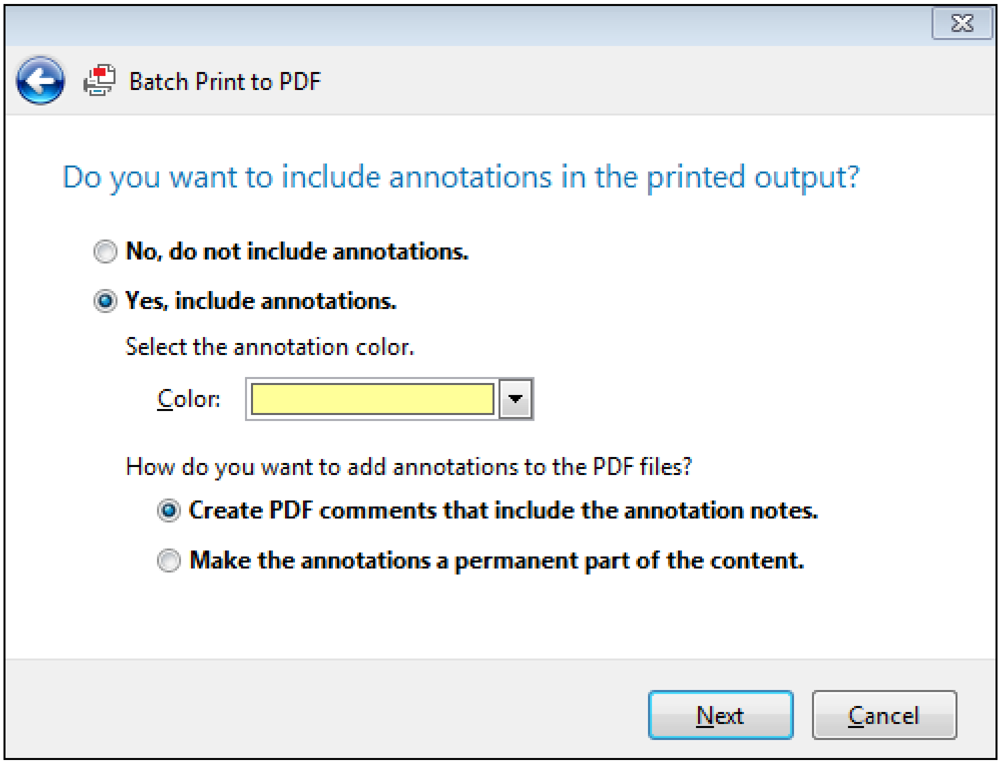
● Use the original document content colors.

○ Convert all of the document content colors to grayscale.

○ Display text in the document in black.

e. Click **Next** to continue.

f. In the **Annotations** dialog box, select whether you want to print annotations, and then click **Next** to continue.



Batch Print to PDF

Do you want to include annotations in the printed output?

○ No, do not include annotations.

● Yes, include annotations.

Select the annotation color.

Color: 🟨

How do you want to add annotations to the PDF files?

● Create PDF comments that include the annotation notes.

○ Make the annotations a permanent part of the content.

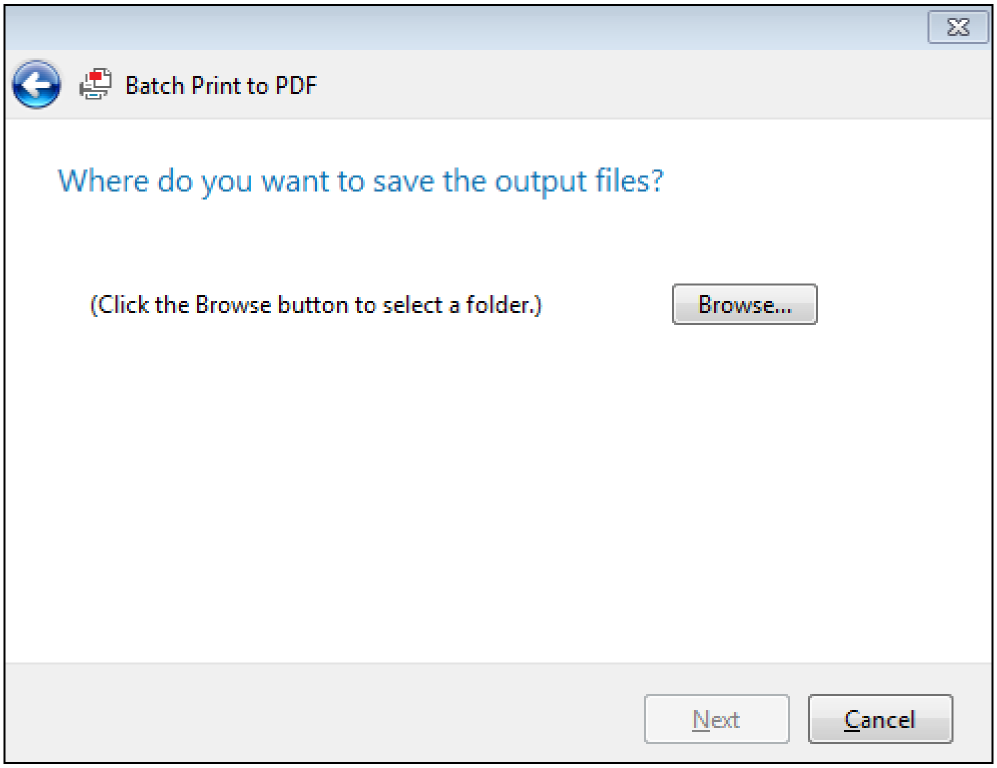
If Yes, click on the color for which you want annotations to print in the Color list.

Select how you want to add annotations to the PDF files:

- Create PDF comments that include annotation notes
- Make the annotations a permanent part of the content

g. Click **Next** to continue.

h. In the **Output Destination** dialog box, click the **Browse** button to navigate to the network folder where you want the files saved, and then click **OK**.


Batch Print to PDF
Browse...
Next
Cancel

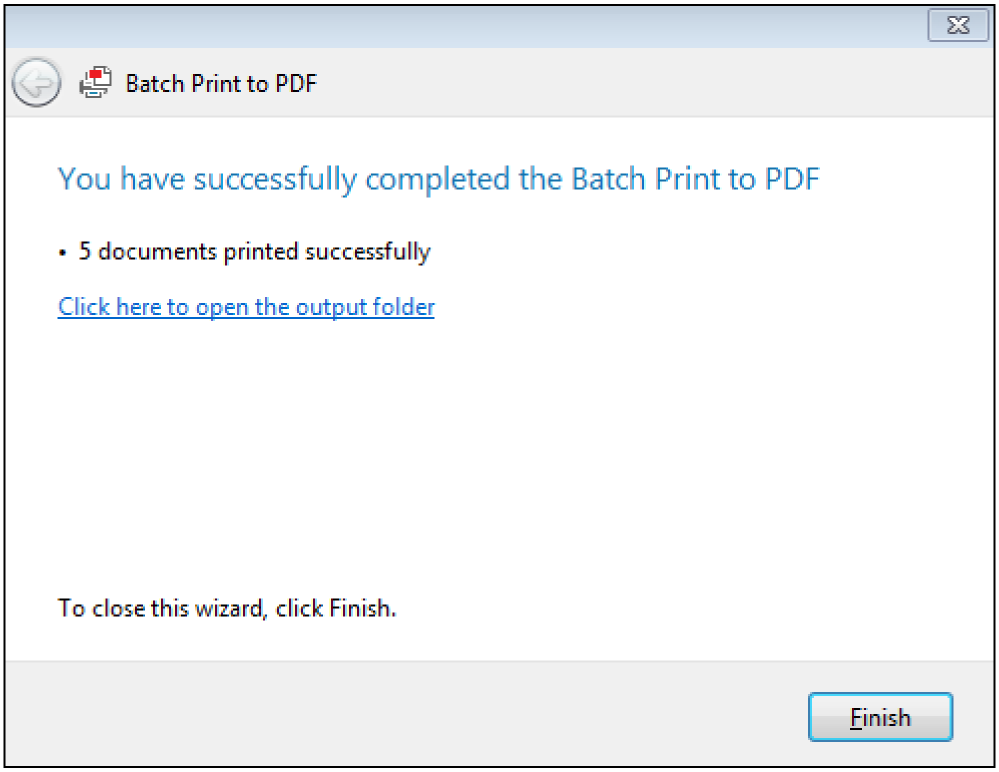
Where do you want to save the output files?

(Click the Browse button to select a folder.)

i. Click **Next** to continue.

j. In the **Review Options and Start** dialog box, review your selected options, then click **Next**.

k. In the **Complete** box, review the number of documents that printed successfully.



You have successfully completed the Batch Print to PDF

- 5 documents printed successfully

Click here to open the output folder

To close this wizard, click Finish.

l. Optional: Click the link **Click here to open the output folder** to review the printed output.

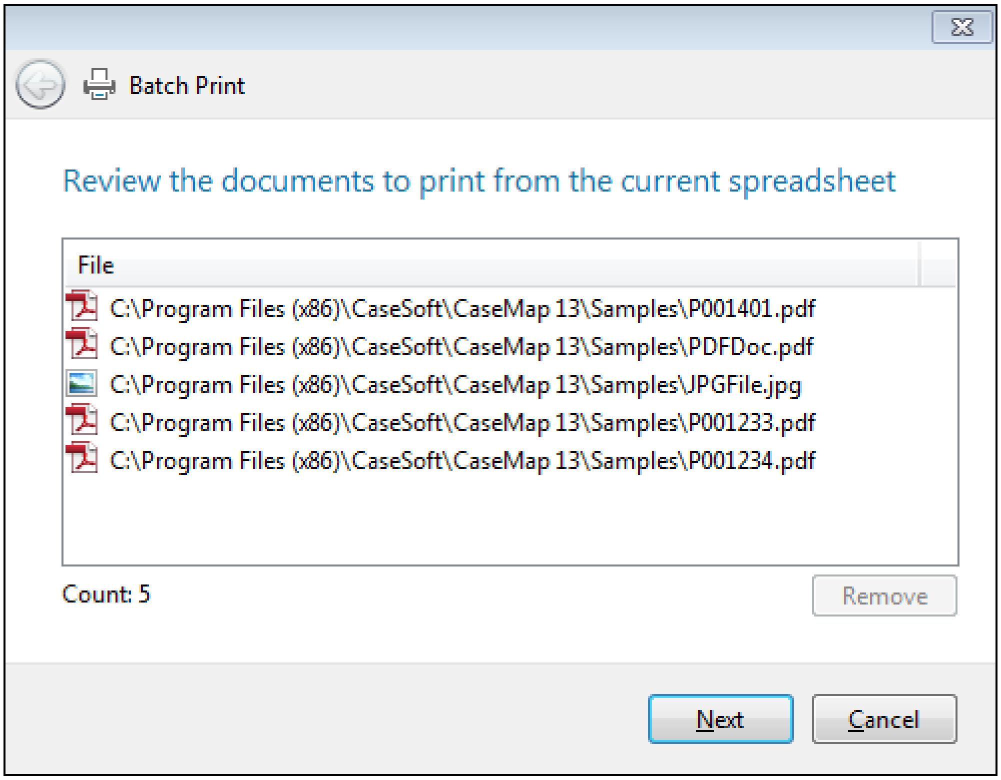
m. Click **Finish** to close the wizard.

### ⊟ To TIFF

a. On the **Batch Print** submenu menu, click **To TIFF**.

b. When the **Batch Print Wizard** launches, click **Next**.

c. In the **Review Documents** dialog box, review the documents you want to print from the current spreadsheet.



Review the documents to print from the current spreadsheet

C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001401.pdf
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\PDFDoc.pdf
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\JPGFile.jpg
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001233.pdf
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001234.pdf

Count: 5

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

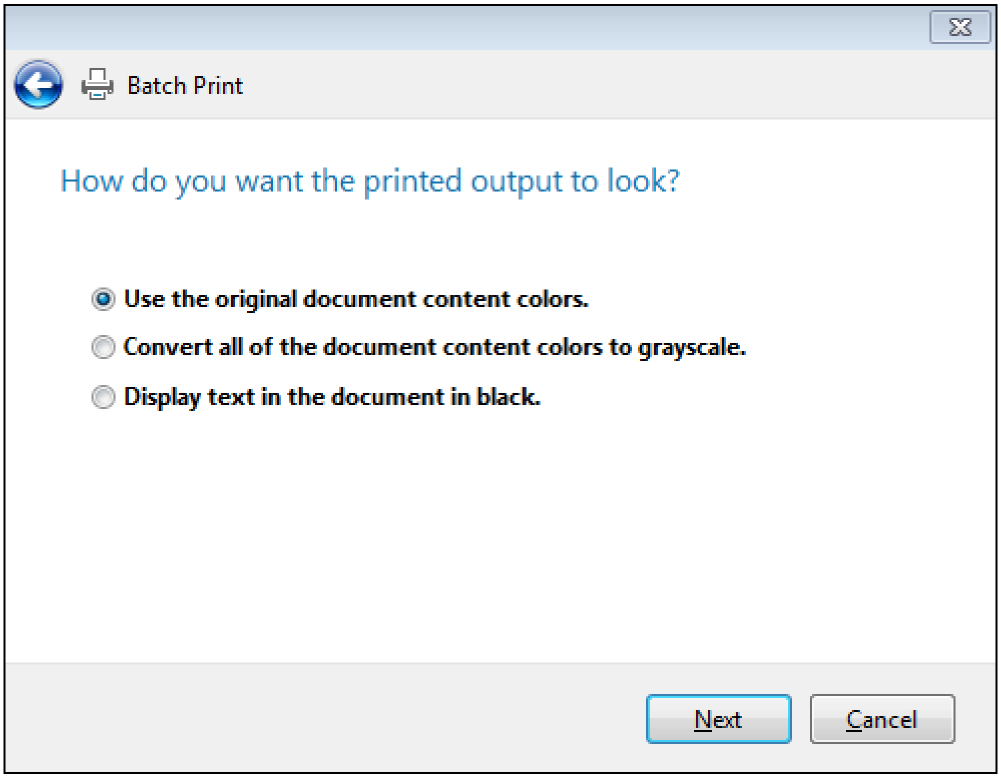
d. Click **Next** to continue.

e. In the **Document Content Colors** dialog box, select a document content color option:

**Use the original document content colors**

**Convert all of the document content colors to grayscale**

**Display text in the document in black**



How do you want the printed output to look?

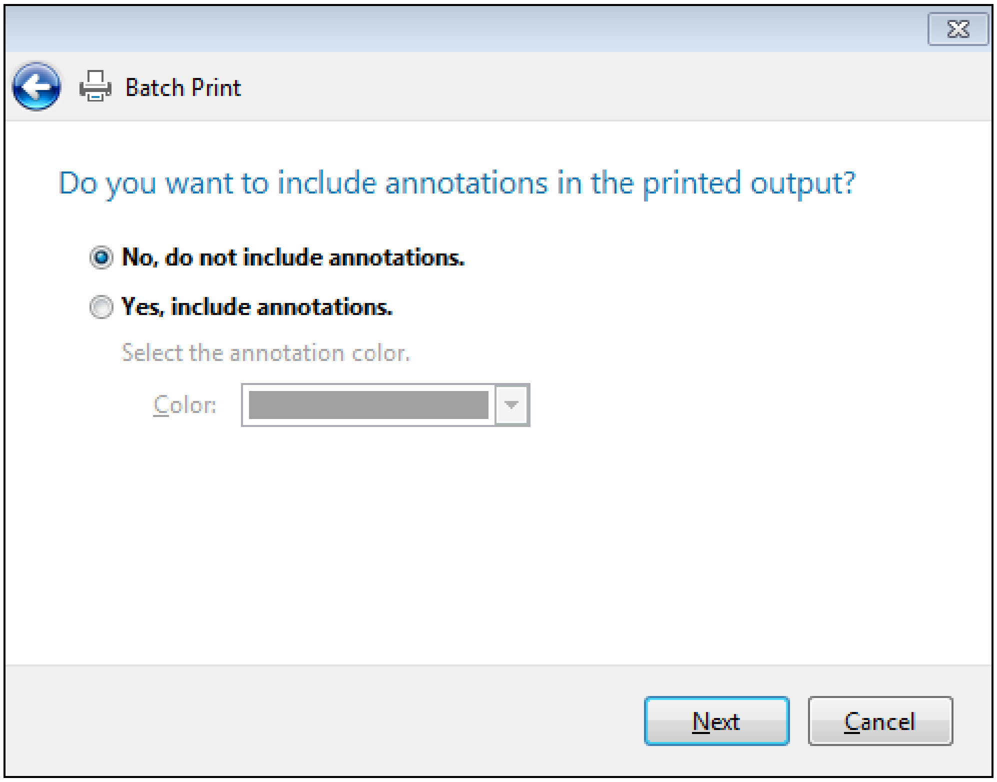
● Use the original document content colors.

○ Convert all of the document content colors to grayscale.

○ Display text in the document in black.

f. Click **Next** to continue.

g. In the **Annotations** dialog box, select whether you want to print annotations, and then click **Next** to continue.



Do you want to include annotations in the printed output?

● No, do not include annotations.

○ Yes, include annotations.

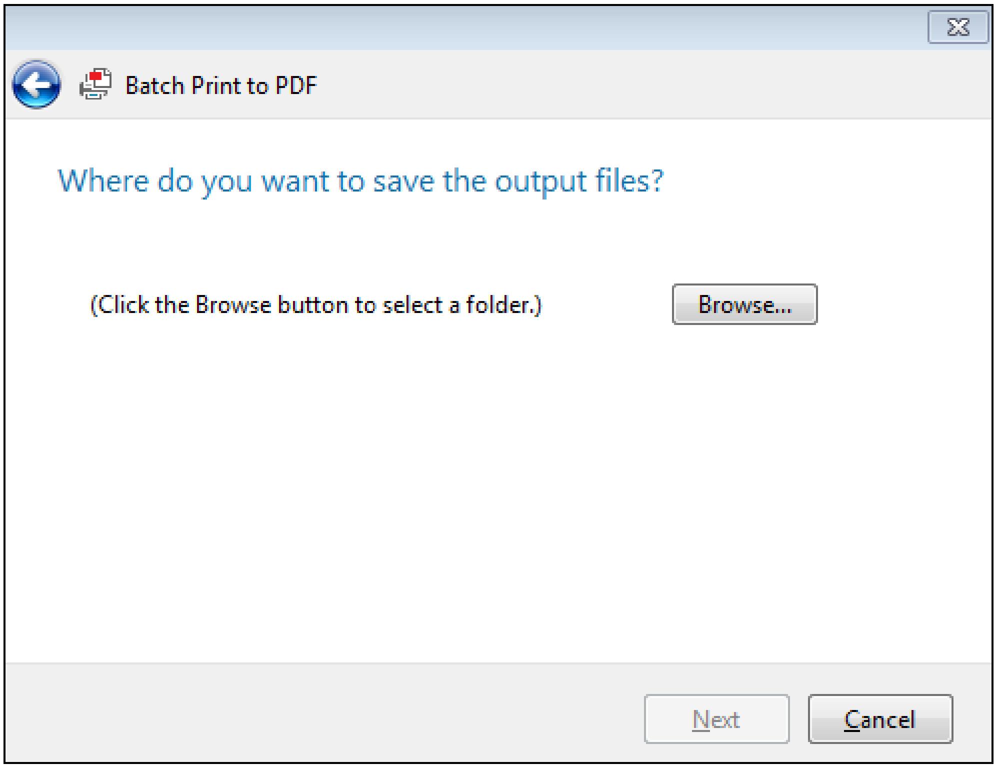
Select the annotation color.

Color:

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

h. Click **Next** to continue.

i. In the **Output Destination** dialog box, click the **Browse** button to navigate to the network folder where you want the files saved, and then click **OK**.


Batch Print to PDF

Where do you want to save the output files?

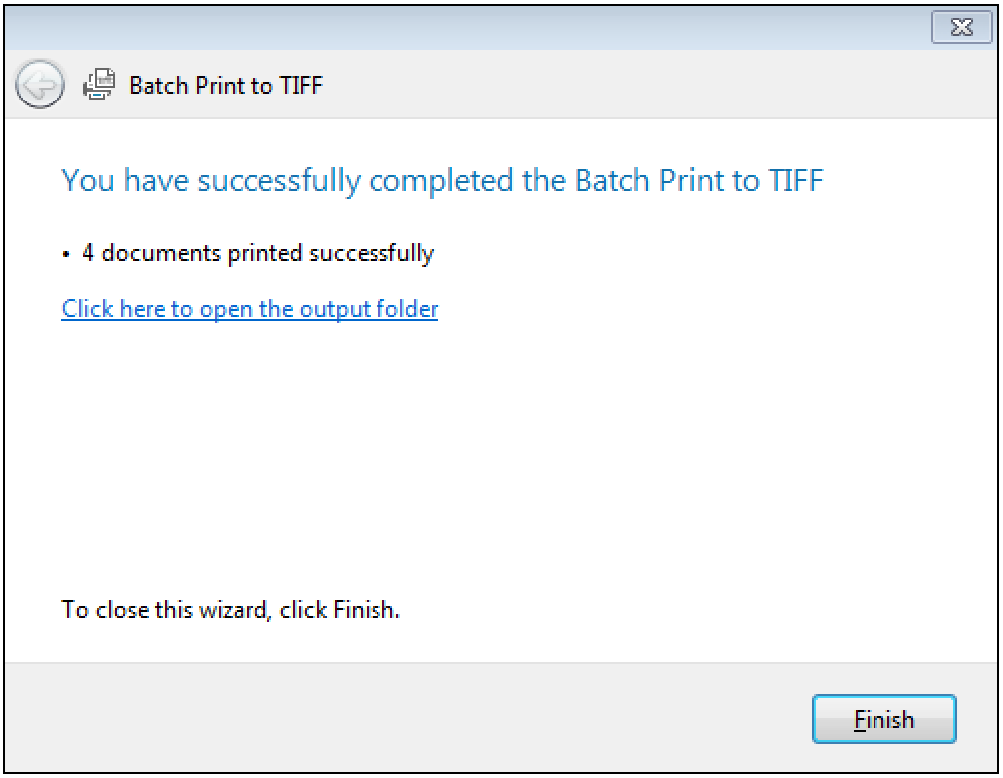
(Click the Browse button to select a folder.)

Browse...
Next
Cancel

j. Click **Next** to continue.

k. In the **Review Options and Start** dialog box, review your selected options, then click **Next**.

l. In the **Complete** box, review the number of documents that printed successfully.



Batch Print to TIFF

You have successfully completed the Batch Print to TIFF

- 4 documents printed successfully

Click here to open the output folder

To close this wizard, click Finish.

m. Optional: Click the link **Click here to open the output folder** to review the printed output.

n. Click **Finish** to close the wizard.

Related Topics

Batch printing linked documents
Importing PDFs
Reviewing PDFs
About printing reports

## Document production

You can use the Document Production wizard to create documents that are ready to be shared in legal proceedings. The wizard provides options for Bates numbering, headers and footers, inclusion and exclusion criteria, file formatting options, and more.

Starting with CaseMap 14, performing document production assign values only to the **Prod Bates Range** field, and not to either the **Bates - Begin** or **Bates - End** fields.

## ⊟ To start the Document Production wizard

1. Open the case that has documents you want to produce, then do either of the following:
    - Click **File** > **Document Production**.
    - Click **Reports** > **Document Production**.
2. Select options to complete the wizard.

    For more detailed information on options, see the other procedures below in this topic.

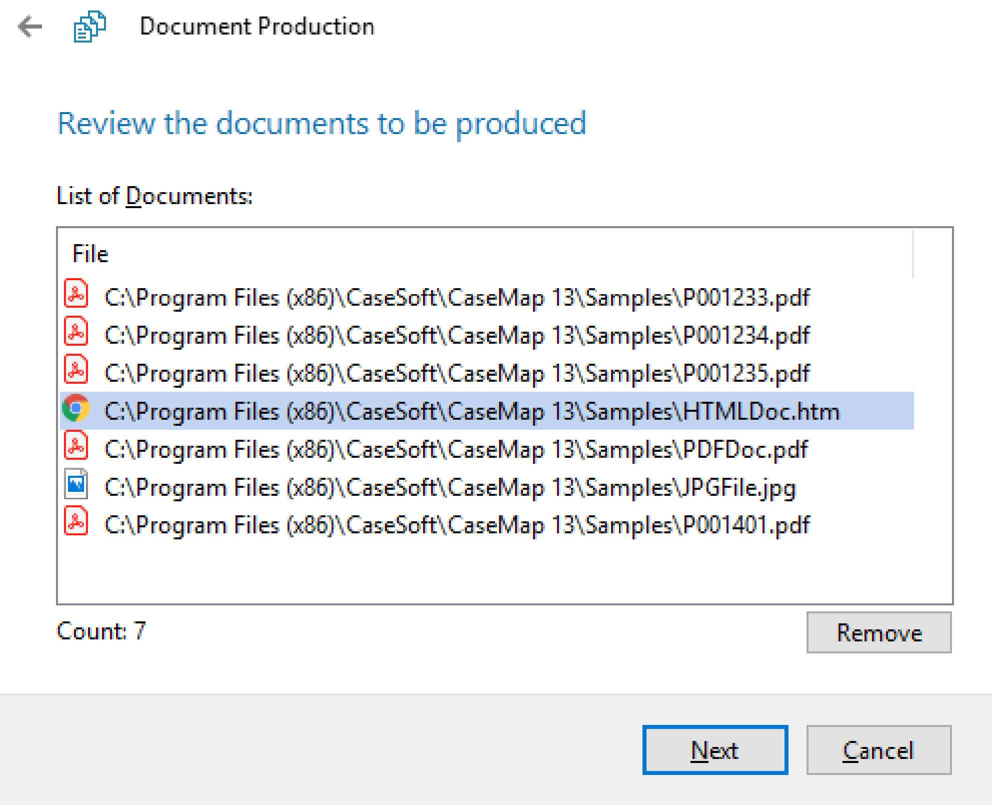
## ⊟ Licensing

Document Production requires the activation of the CaseMap DocManager license. If you do not already have a license activated, when you start the wizard, instructions are provided for activating the full or trial license.

## ⊟ Functionality and options

The Document Production wizard provides the following functionality and options:

- **Selection criteria.** You can choose the initial selection criteria so your production includes all documents or includes documents based on a filter. The option to produce all documents will include all documents attached to the Documents spreadsheet. The option to filter documents provides the following filters:
    - Documents linked to 10+ facts
    - Documents linked to 25+ facts
    - Documents linked to 50+ facts
    - Documents linked to 75+ facts
    - Documents with attachments
    - Documents with linked file not set
    - Documents with linked file set
    - Documents without Bates numbers
    - Emails
    - Privileged documents
- **Remove individual documents.** After selecting initial inclusion criteria, you can select documents for removal from the production.



Review the documents to be produced

List of Documents:

| File |
|---|
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001233.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001234.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001235.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\HTMLDoc.htm |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\PDFDoc.pdf |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\JPGFile.jpg |
| C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001401.pdf |

Count: 7

- **Bates numbering.** You can apply Bates stamps to produced documents using the following options:
  - Prefix, starting number, and number of digits.
  - Font family, size, and style as bold or italic.
  - Location of stamp on document.
  - Shrink document image to fit the stamp. If selected, the document content is re-sized so the Bates stamp does not overlap document content in the printed output.
  - Order of documents produced.

> When documents are produced, the **Prod Bates Range** field in the Documents spreadsheet is appended with the Bates range applied. This field is intended for use when auditing and is hidden and locked by default.

- **Exclusion criteria.** You can systematically exclude documents from the production based on privilege, filter, or document type.
- **Headers and footers.** You can add headers and/or footers to produced documents. If selected, you can choose a page location for headers and footers. You can also control which documents receive headers and footers, applying them to all produced documents or to just those that conform to a saved filter.
- **Color.** Select color options for the produced documents: keep original colors, convert colors to grayscale, or display all text as black.
- **Output format.** Select an output format as OCR PDF, image-based PDF, image-based PDF with OCR text file, or TIFF image. Note that output options for OCR PDF and for image-based PDF with OCR text file are only available when all files in the production have been

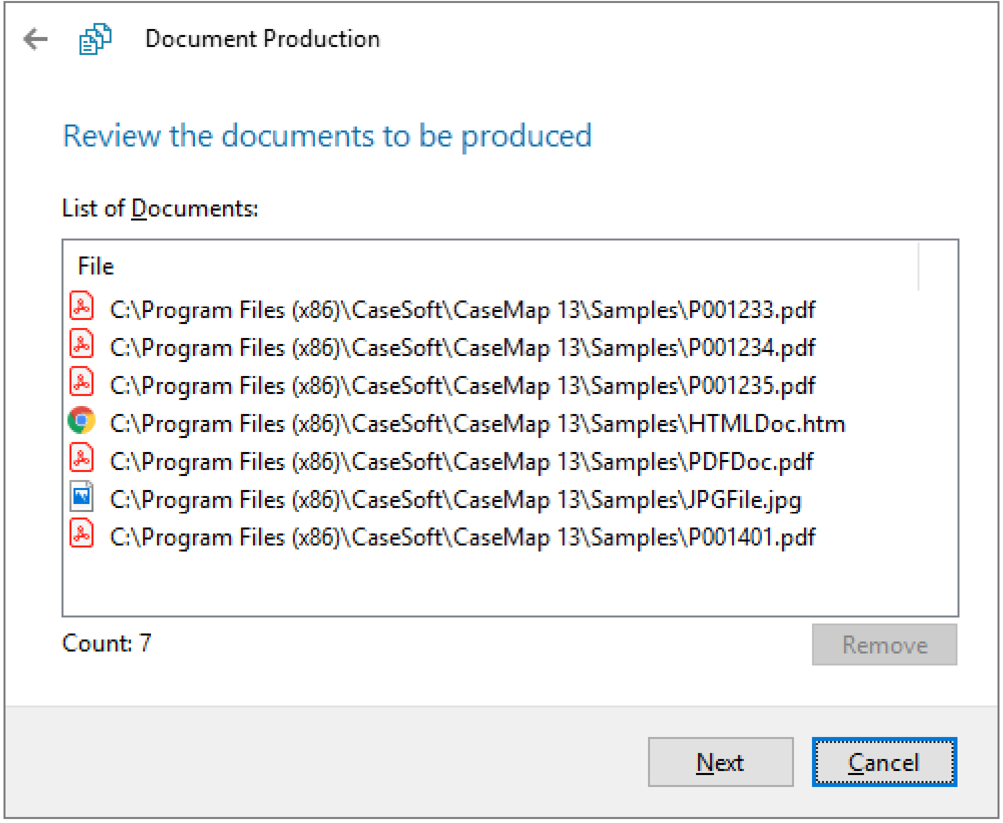
OCRd. For more information on OCR processing in CaseMap, see: About OCR processing.

- **Destination**. Select a folder for production output.
- **File naming convention.** Select a file naming convention based on Bates number or based on original file names.
- **Preview or cancel.** Preview the production output and cancel production.

### ⊟ To run the Document Processing wizard

1. Open a case.
2. Click **File**, then click **Document Production.**
3. Do one of the following to select the initial inclusion criteria for documents.
   - Click **All Documents** and then click **Next**.
   - Click **Saved Filter**, select a filter from the list, and then click **Next**.

   The wizard builds a list of documents to be included in the production output.



Review the documents to be produced

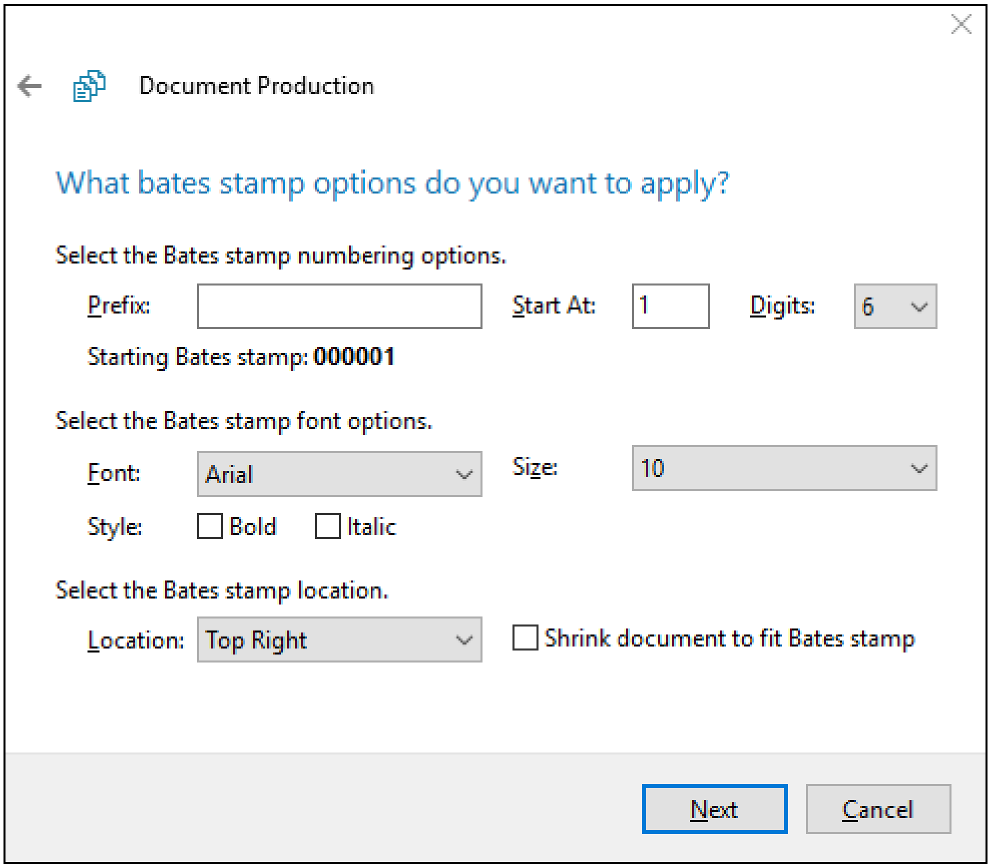
List of Documents:

File
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001233.pdf
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001234.pdf
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001235.pdf
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\HTMLDoc.htm
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\PDFDoc.pdf
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\JPGFile.jpg
C:\Program Files (x86)\CaseSoft\CaseMap 13\Samples\P001401.pdf

Count: 7

4. Review the list. Optionally, select any documents you want to remove from the production. Press **Shift**+click to select a range of files. Press **Ctrl**+click to select multiple files in the list. Click **Next**.

   The wizard displays the Bates numbering options.



Document Production

What bates stamp options do you want to apply?

Select the Bates stamp numbering options.

Prefix: Start At: 1 Digits: 6

Starting Bates stamp: **000001**

Select the Bates stamp font options.

Font: Arial Size: 10

Style: ☐ Bold ☐ Italic

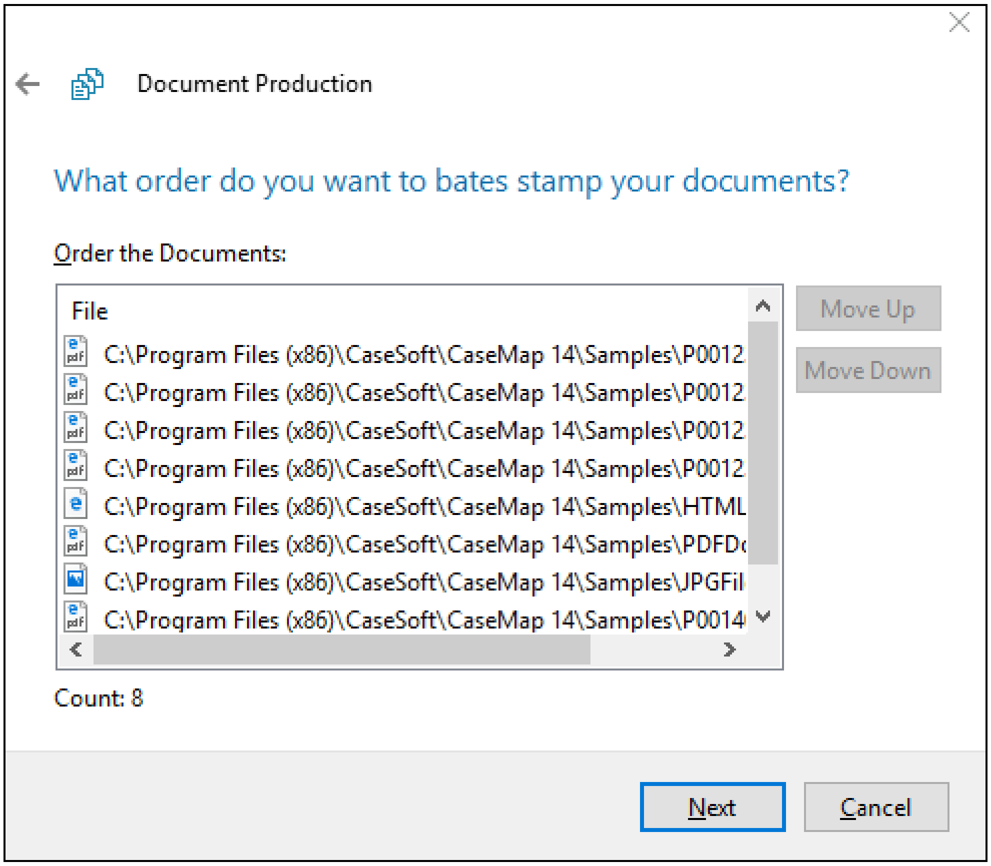
Select the Bates stamp location.

Location: Top Right ☐ Shrink document to fit Bates stamp

5. Select options for applying Bates stamps to the production copies of files, and then click **Next:**
   - Bates number prefix, starting number, and number of digits
   - Font family, size, and style as bold or italic
   - Location of stamp on document
   - Shrink document image. If selected, this option shrinks the output page image with space for the Bates number to print clearly on the page margin.

If source documents already contain Bates numbers, they will remain on final output.

The wizard displays the order that documents will be produced.



What order do you want to bates stamp your documents?

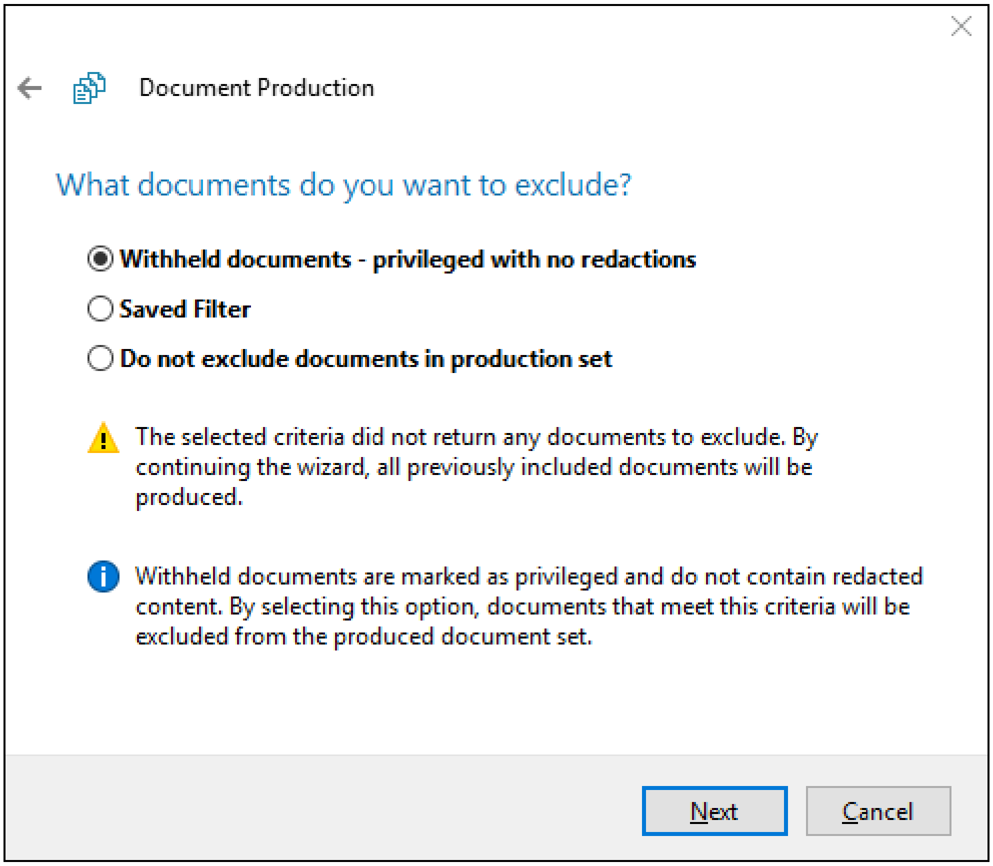
Order the Documents:

| File |
|---|
| C:\Program Files (x86)\CaseSoft\CaseMap 14\Samples\P0012 |
| C:\Program Files (x86)\CaseSoft\CaseMap 14\Samples\P0012 |
| C:\Program Files (x86)\CaseSoft\CaseMap 14\Samples\P0012 |
| C:\Program Files (x86)\CaseSoft\CaseMap 14\Samples\P0012 |
| C:\Program Files (x86)\CaseSoft\CaseMap 14\Samples\HTML |
| C:\Program Files (x86)\CaseSoft\CaseMap 14\Samples\PDFD |
| C:\Program Files (x86)\CaseSoft\CaseMap 14\Samples\JPGFil |
| C:\Program Files (x86)\CaseSoft\CaseMap 14\Samples\P0014 |

Count: 8

6. Review the order of the documents to be Bates stamped. To change the order of document production select a document then click **Move Up** or **Move Down**. Then click **Next**.

   The wizard displays options for applying exclusions based on privilege and redactions applied, and on filtering criteria.



What documents do you want to exclude?

● Withheld documents - privileged with no redactions
○ Saved Filter
○ Do not exclude documents in production set

The selected criteria did not return any documents to exclude. By continuing the wizard, all previously included documents will be produced.

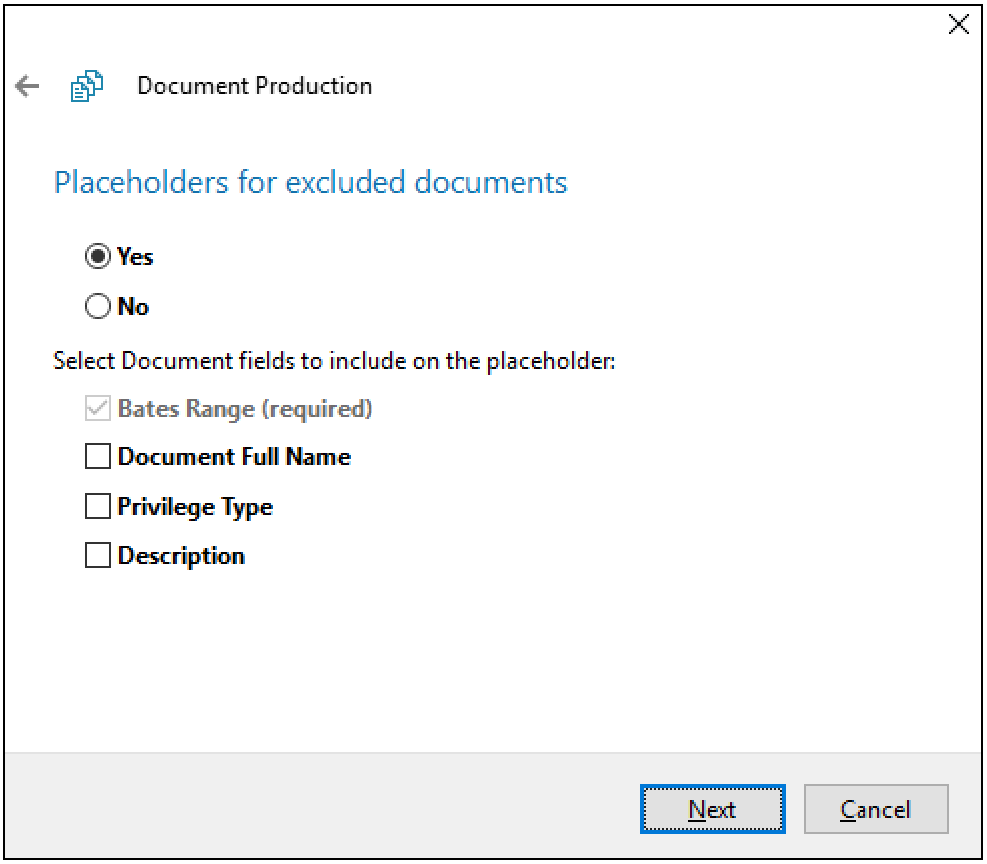
Withheld documents are marked as privileged and do not contain redacted content. By selecting this option, documents that meet this criteria will be excluded from the produced document set.

7. Select one of the following options and then click **Next**:

   - To exclude documents that are marked in CaseMap as privileged but have no redactions in CaseMap, select the **Withheld documents - privileged with no redactions**.

     More on this option

     > If this option is selected and any document included in the production is marked as privileged, after you click **Next**, you will be given the option to produce a placeholder for the privileged documents.


Document Production

Placeholders for excluded documents

● Yes

○ No

Select Document fields to include on the placeholder:

☑ Bates Range (required)

☐ Document Full Name

☐ Privilege Type

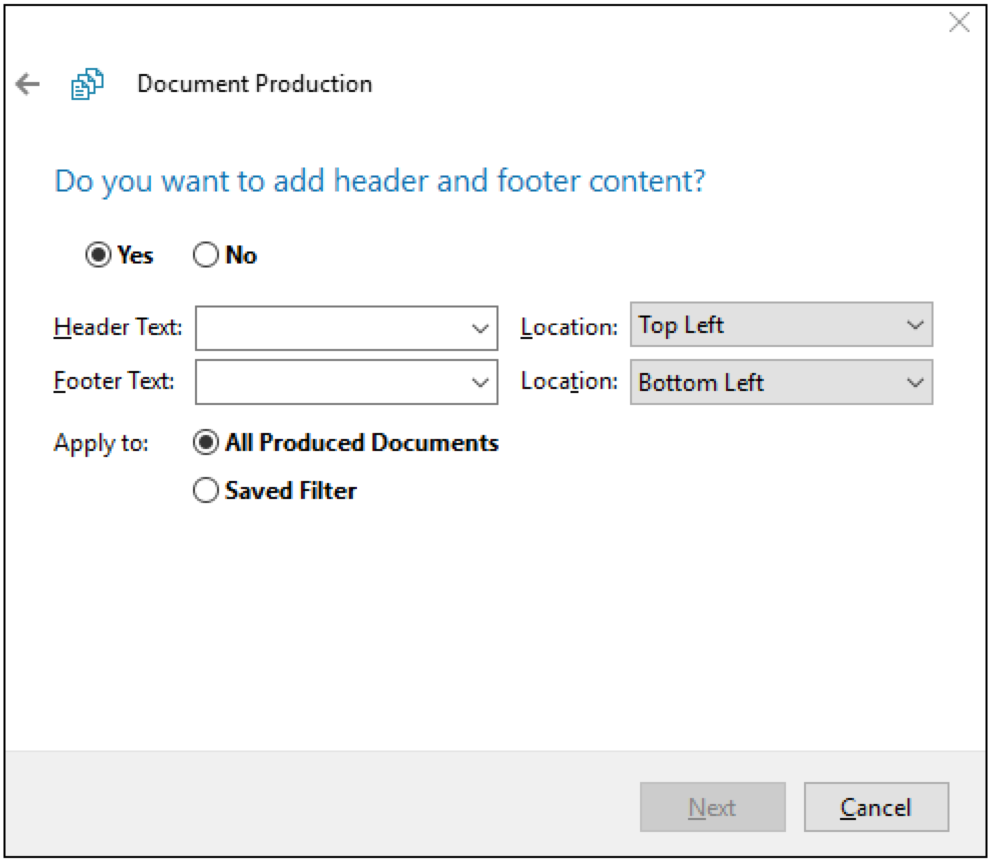
☐ Description

**Bates numbers are automatically applied to placeholders for privileged, unredacted documents, but you can also add document name, privilege type, or description.**

- Select options as needed in this dialog box, then click **Next**.

- To exclude documents based on a filter, select **Saved Filter**, and then select a filter to use as exclusion criteria.
- To add no exclusion criteria, select **Do not exclude documents in production set**.

The wizard displays header and footer options.



Do you want to add header and footer content?

● Yes ○ No

Header Text:

Location: Top Left

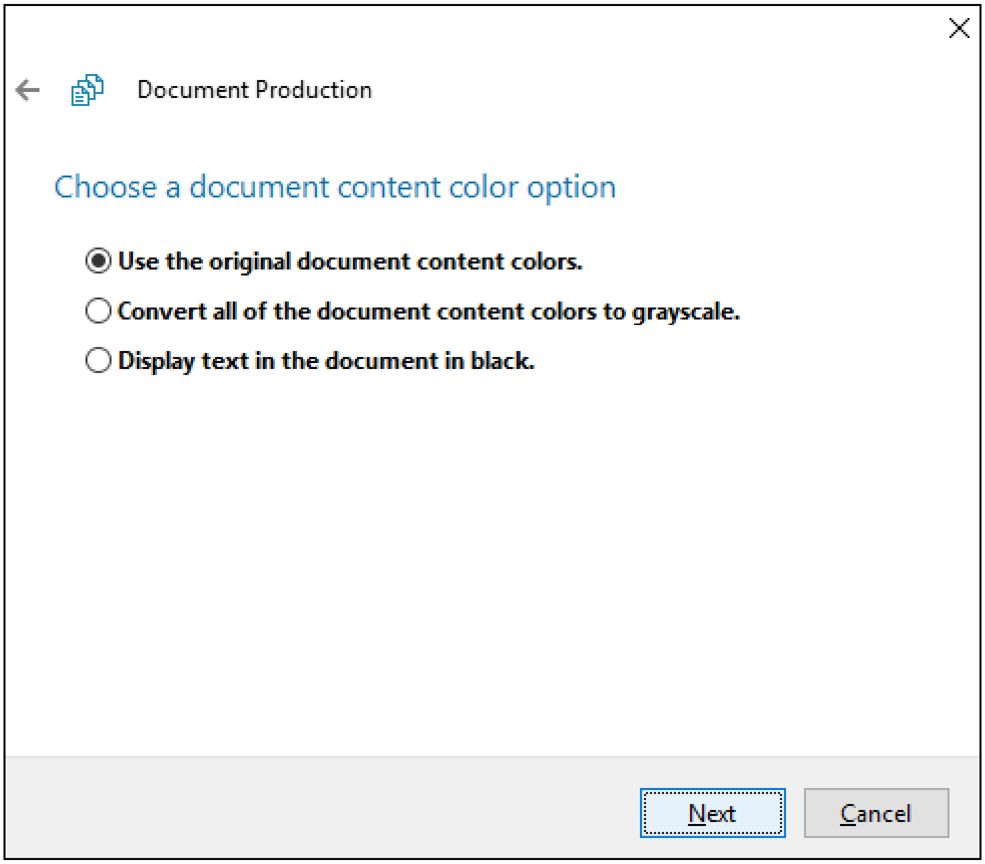
Footer Text:

Location: Bottom Left

Apply to: ● All Produced Documents ○ Saved Filter

8. Skip adding a header/footer or configure header/footer options as follows:
   - To skip adding a header and/or footer, click **Next**.
   - To add header and/or footer, click **Yes**. Then select header and footer options as needed. If you want the header/footer to be applied only to a subset of the produced files, click **Saved Filter**, then select one of the available filters. When finished configuring options, click **Next**.

   The wizard displays options for color output.



Document Production

Choose a document content color option

● Use the original document content colors.

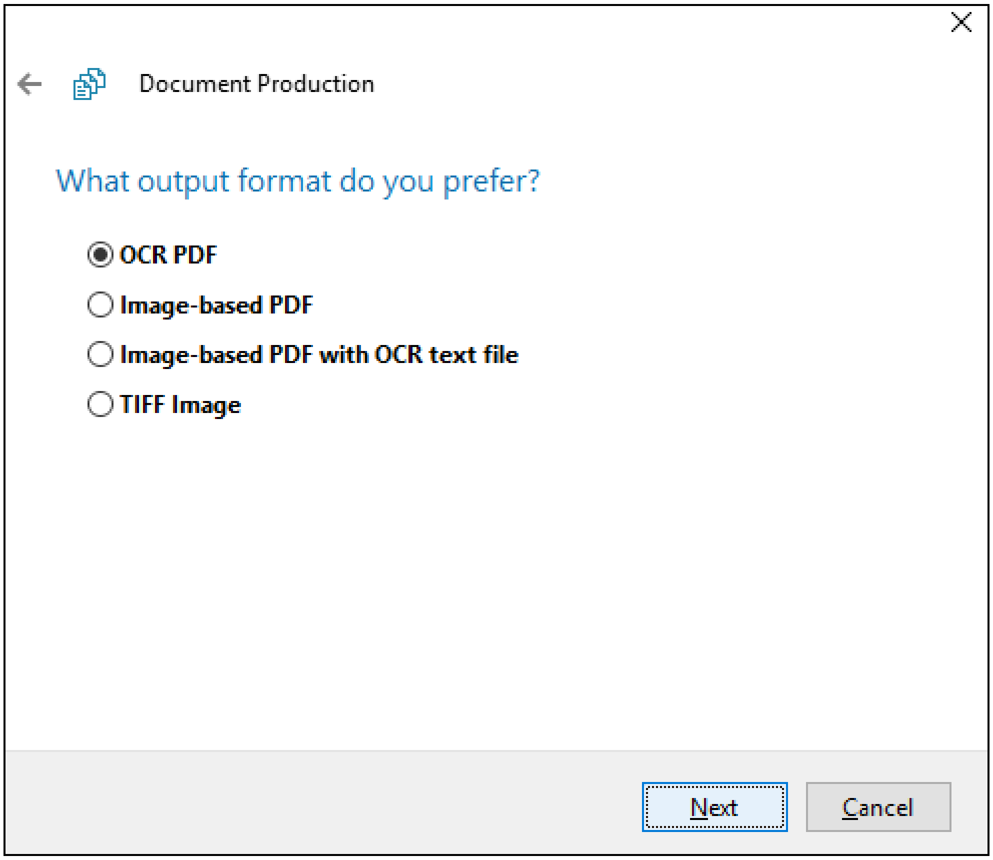
○ Convert all of the document content colors to grayscale.

○ Display text in the document in black.

Next
Cancel

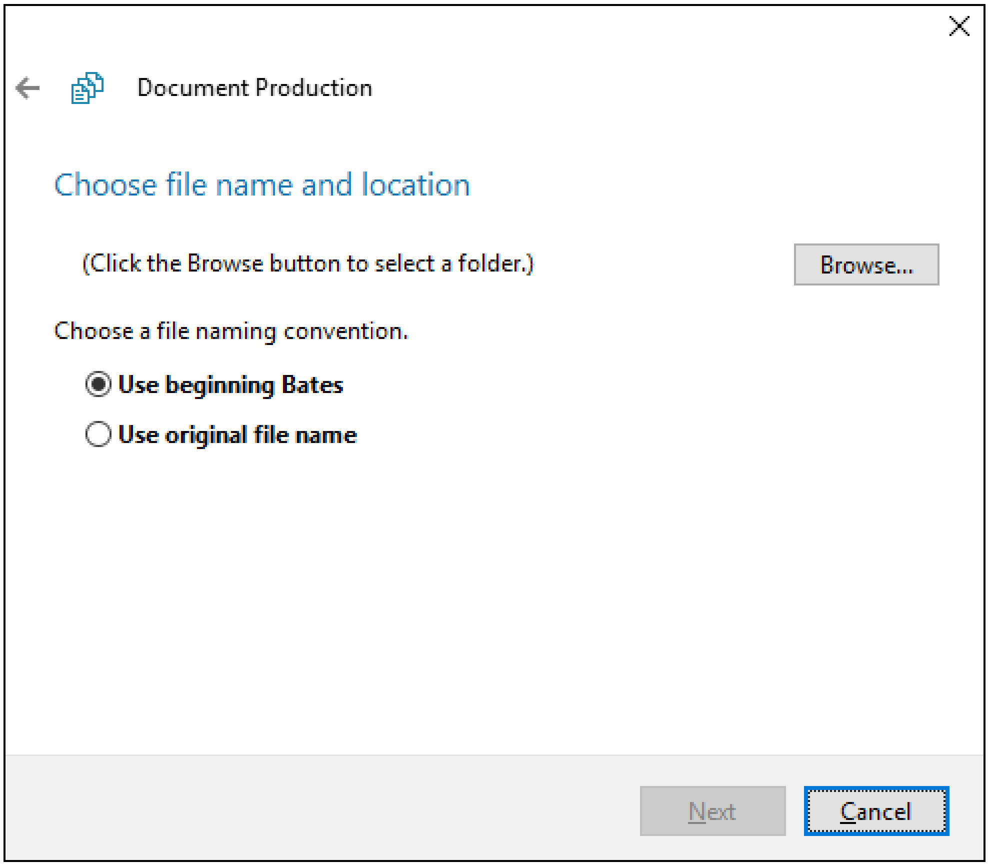
9. Select one of the following options, and then click **Next**:
    - **Use the original document content colors.** This option transfers the original colors to the production copies.
    - **Convert all of the document content colors to grayscale.** This option converts all colors to grayscale in the production copies.
    - **Display text in the document in black.** This option renders all text in the document in black.

    The wizard displays output format options.


Document Production
What output format do you prefer?
● OCR PDF
○ Image-based PDF
○ Image-based PDF with OCR text file
○ TIFF Image
Next
Cancel

10. Select an output format, then click **Next:**
    - **OCR PDF** -- This option is available only if all documents in production set have been OCR'd.
    - **Image-based PDF**
    - **Imaged-based PDF with OCR text file** -- This option is available only if all documents in production set have been OCR'd.
    - **TIFF Image**

    The wizard displays options for production destination folder and file naming.



Choose file name and location

(Click the Browse button to select a folder.)

Choose a file naming convention.

● Use beginning Bates

○ Use original file name

11. Click **Browse**, select a folder where you want the files to be copied, then click **OK**.

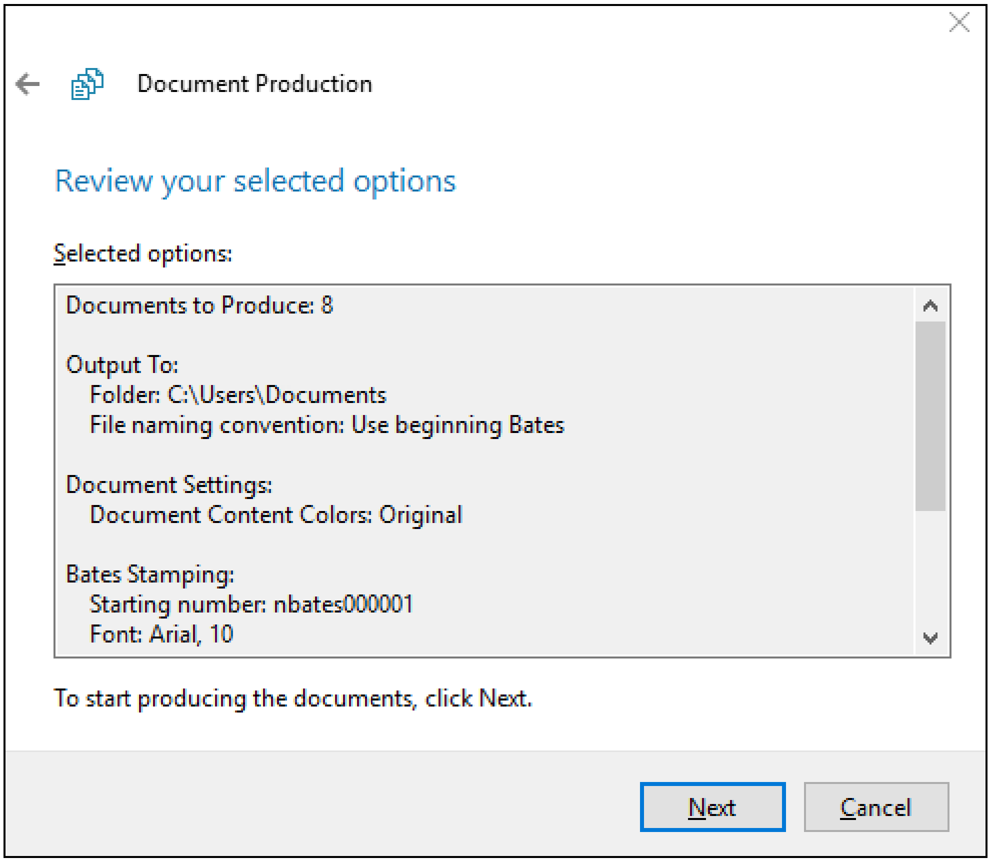
12. Select one of the following options for naming files, and then click **Next**:

   - **Use beginning Bates**. This option names the file using the number generated from the starting Bates stamp (e.g., 00001).

     CaseMap's default behavior is to use the beginning Bates number as the full name and to create the short name.

   - **Use original file name**. This option reuses the original file name for the new file.

   The wizard displays a summary of the production.



Review your selected options

Selected options:

Documents to Produce: 8

Output To:
Folder: C:\Users\Documents
File naming convention: Use beginning Bates

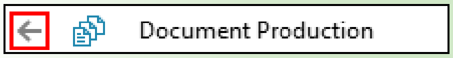
Document Settings:
Document Content Colors: Original

Bates Stamping:
Starting number: nbates000001
Font: Arial, 10

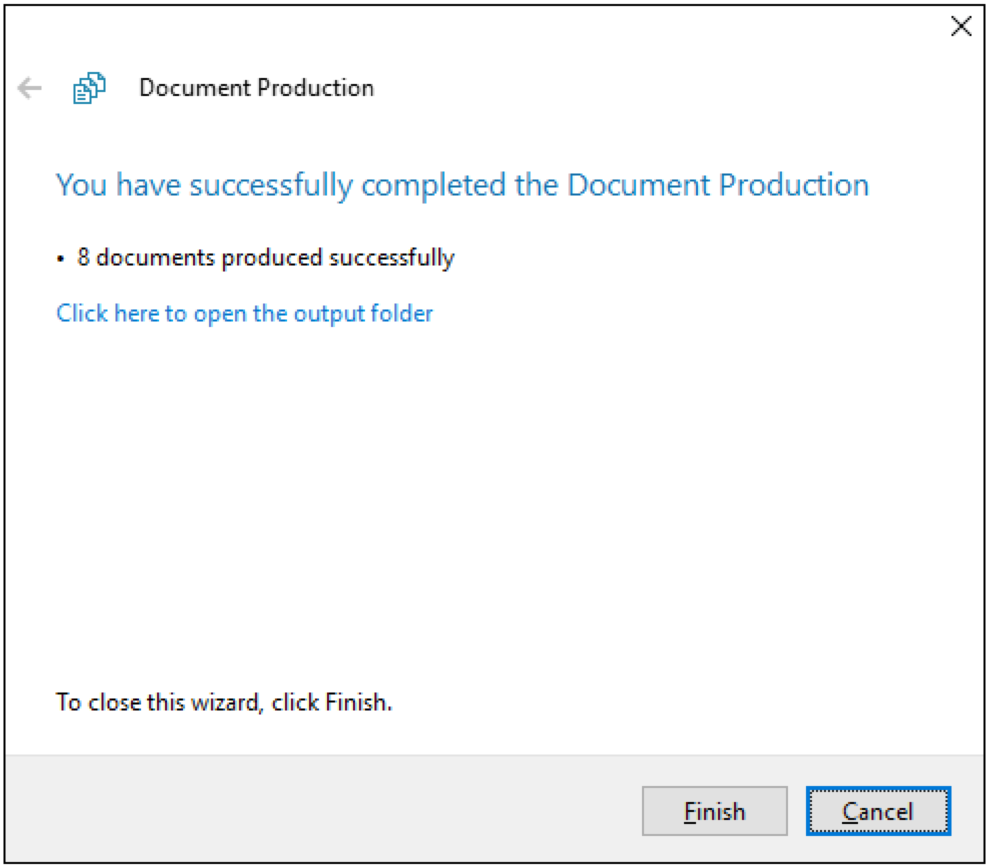
To start producing the documents, click Next.

13. Review the production details, and then to start production, click **Next**.

If you want to make a change, click the back arrow to return to any previous screen in the wizard.



When the production is complete the wizard provides a link to open the production folder.



Document Production

You have successfully completed the Document Production

- 8 documents produced successfully

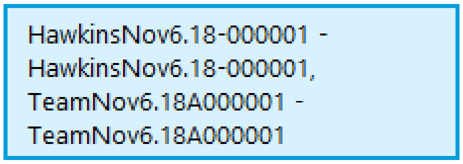
Click here to open the output folder

To close this wizard, click Finish.

14. Click the link to open the production folder or click **Finish**.

### To audit productions by the Document Processing wizard

You can find out how many times a document has been produced by the Document Processing Wizard. To do this, you check the Prod Bates Range field in the Documents spreadsheet. Successive productions are indicated by Bates ranges separated by comma.

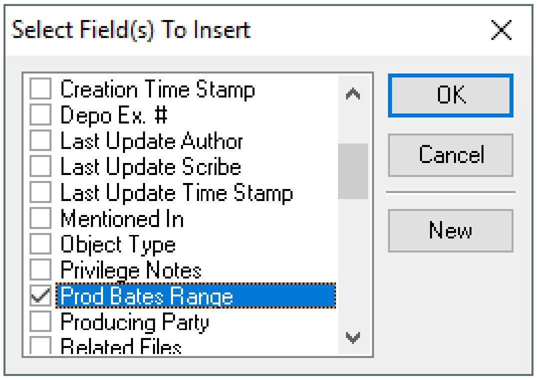


HawkinsNov6.18-000001 -
HawkinsNov6.18-000001,
TeamNov6.18A000001 -
TeamNov6.18A000001

**The ranges separated by comma indicate the selected document was produced twice.**

By default this field is hidden and locked. To enable auditing, you can show this field, then check the value for individual documents.

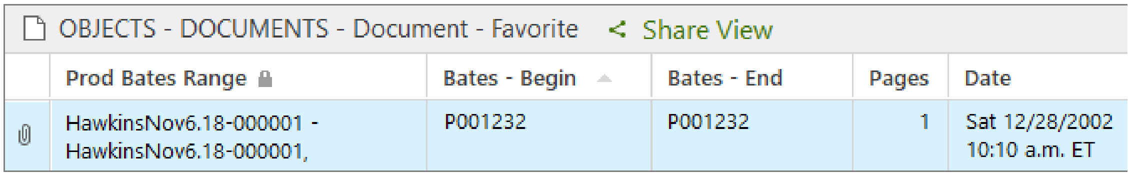
1. Open the case you want to audit.
2. Click the **Documents** link.
3. Right click the column header where you want Prod Bates Range to appear, and then click **Insert Fields.**



Select Field(s) To Insert

☐ Creation Time Stamp
☐ Depo Ex. #
☐ Last Update Author
☐ Last Update Scribe
☐ Last Update Time Stamp
☐ Mentioned In
☐ Object Type
☐ Privilege Notes
☑ Prod Bates Range
☐ Producing Party
☐ Related Files

4. Scroll down the list if necessary, then select **Prod Bates Range** and click **OK**.



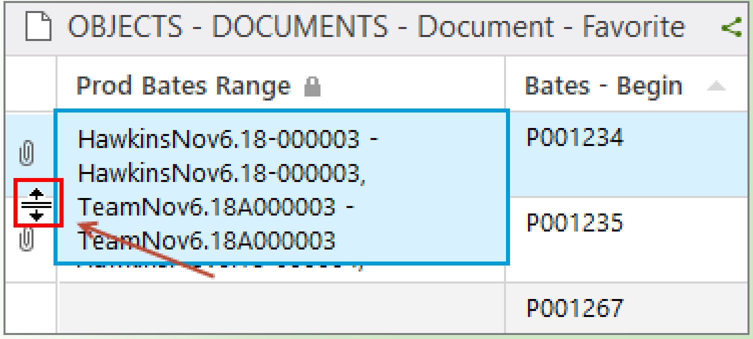
OBJECTS - DOCUMENTS - Document - Favorite

| Prod Bates Range | Bates - Begin | Bates - End | Pages | Date |
|---|---|---|---|---|
| HawkinsNov6.18-000001 - HawkinsNov6.18-000001, | P001232 | P001232 | 1 | Sat 12/28/2002 10:10 a.m. ET |

5. In the Documents spreadsheet, click the Prod Bates Range field for the document you want to audit.

The field expands. Each comma-separated range represents a time when the document was produced.

To make it easier to view multiple Bates ranges without having to click individual cells, you can try increasing the height for all rows in the Documents spreadsheet. To do this, click the bottom margin of the first cell in the spreadsheet then drag down.



OBJECTS - DOCUMENTS - Document - Favorite

| Prod Bates Range | Bates - Begin |
|---|---|
| HawkinsNov6.18-000003 - HawkinsNov6.18-000003, TeamNov6.18A000003 - TeamNov6.18A000003 | P001234 |
| | P001235 |
| | P001267 |

Related Topics

[Batch printing linked documents]
[Changing report print options]
[Viewing documents and images]

# *Exporting Data*

## About exporting data

CaseMap allows you to extract case data to save in a variety of file formats, export directly to another application like Microsoft® Excel or Adobe® Acrobat, or into a companion product like TimeMap®, Sanction®, or NoteMap®. In order to view the exported data, you must have a license of the native application installed on your computer.

When you export data, only the current spreadsheet view is exported. If you have run a search filter on a spreadsheet prior to the export, then only the filtered data is included. You can export data just to preserve a backup copy of a filtered search or all records in a spreadsheet.

***You can export CaseMap data from:***

- **Spreadsheets** — On the File tab, click Export to save the current spreadsheet view to a file on your computer or in a network folder.
- **List dialog boxes** — Access list dialog boxes by double-clicking in a spreadsheet's # field, a CaseWide bar, or Evaluation Comparison cell for which you want to view data and then click Export.

***Export data to the following programs and formats:***

- CaseMap portable file format
- CaseMap ReportBook definition file
- Corel WordPerfect
- HTML Web Browser
- LexisNexis TimeMap, Sanction, and NoteMap
- Microsoft Word and Excel
- Text file (including comma or tab delimited)

📝 For information about exporting ReportBooks, see Exporting/importing ReportBooks.

### ⊟ Review file format options

Reference the following table to understand the file format options that you can export CaseMap data into.

| **Export File Format Options** | |
|---|---|
| **File Format** | **Description** |
| .CMRBK | A CaseMap ReportBook definition file that contains the layout for the ReportBook. You can import this format into another CaseMap case (version 5.0+). |
| .CSV | A comma delimited text format that allows you to automatically open the file in Microsoft Excel without having to modify the format. This |

**Export File Format Options**

| File Format | Description |
|---|---|
| | format is recommended when using Excel. |
| .CPF | A CaseMap portable file format that allows you to import the data into another CaseMap case. |
| Delimited Text | A delimited text format where each field value is separated by either a comma or tab character. |
| HTML | A text file format that can be opened in a Web browser. |
| Text | A non-delimited text format where each field value is displayed on a separate line. |

Text files cannot display graphic images. Tagged field data and icons as well as data from check boxes and Evaluation fields are not loaded into an export text file.

Related Topics

Sending data to TimeMap
Sending data to Sanction
Exporting data to Word, WordPerfect, HTML
Exporting data to Excel
Exporting spreadsheet data/reports

## Exporting spreadsheet data/reports

You can save data from spreadsheet and list dialog boxes by exporting it to a file. By exporting spreadsheet data and views to a file, you have a backup copy of a report to reference later or import into another case. This is especially helpful if you have organized fields into a spreadsheet view that also include custom fields.

When you export data, CaseMap creates a text file and loads the data from the spreadsheet or list dialog box into it. The format of the data in the text file is based on the file type you select during the export.

***Export data to the following text file formats:***

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

There are two comma delimited text file types: .csv and .txt. The .csv file type allows you to open the file using Microsoft® Excel without having to modify the format of the file. The .txt files requires you to format the file prior to viewing it in Excel.

- **Non-delimited text files** — A text file where each field value is displayed on a separate line.

***Data export considerations:***

- If spreadsheet data has been filtered, then only the filtered data or current spreadsheet view will be exported.
- The tag field and any tag icons for case records are not loaded into the export text file.
- Data from check boxes and Evaluation fields displays as text instead of icons. Text files cannot display graphic images.

### ⊟ To export spreadsheet data or views

1. Organize and/or sort the spreadsheet to include only the fields and records you want to export.
2. On the **File** tab, click **Export**.
3. In the **Save As** dialog box, navigate to the network folder where you store reports and other case information.
4. In the **File Name** field, type in a name for the spreadsheet view or report.
5. In the **Save as type** field, click on the file type you want to use.
6. Click **Save** to continue.
7. In the message box to confirm the export, click **Yes** to open the exported file and review it or click **No** to skip this option.

   You can now import the file into another CaseMap case, if needed.

### ⊟ To export list dialog box data

1. In the **List** dialog box, click the **Export** button.

   Access list dialog boxes by double-clicking in a spreadsheet's # field, a CaseWide bar, or Evaluation Comparison cell for which you want to view data.

2. In the **Save As** dialog box, navigate to the network folder where you store reports and other case information.
3. In the **File Name** field, type in a name for the spreadsheet view or report.
4. In the **Save as type** field, click on the file type you want to use.
5. Click **Save** to continue.
6. In the message box to confirm the export, click **Yes** to open the exported file and review it or click **No** to skip this option.

   You can now import the file into another CaseMap case, if needed.

Related Topics

[About exporting data]()
[About creating reports]()
[Creating spreadsheet views]()
[Changing spreadsheet views]()
[Importing text files]()

## Exporting/importing ReportBooks

You can export a ReportBook by saving it to a definition file that can be read by CaseMap. A ReportBook definition file contains the layout of a CaseMap ReportBook. The file does not contain any case data or reports. CaseMap ReportBooks files have a .cmrbk extension. When you import this file into CaseMap, CaseMap will create a new ReportBook from the definition file.

> ⚠ Before deleting or modifying a ReportBook from a case, you may want to save a backup copy in the network folder where you store reports and other case information. Once you delete a ReportBook, the only way to restore it is to retrieve it from a backup of the case.

### ⊟ To export a ReportBook definition to a file

1. On the **Reports** tab, click **Tools**, and then click **Export and Import.**
2. On the submenu, click **Save a ReportBook Definition to a File**.
3. In the **Select a ReportBook** dialog box, click on the ReportBook you want to export to a file, then click **OK**.
4. In the **Save As** dialog box, navigate to the folder where you want to store the output file, then click **Save**.
5. In the message box to confirm the export, click **OK**.

   The ReportBook file is now saved in the folder you selected.

### ⊟ To email a ReportBook definition

1. On the **Reports** tab, click **Tools**.
2. On the shortcut menu, click **Export and Import**, and then click **Email a ReportBook Definition**.
3. In the **Select a ReportBook** dialog box, click on the ReportBook you want to email, then click **OK**.

   A Microsoft® Outlook email automatically launches with the ReportBook file included as an attachment. The email also includes an explanation of the ReportBook file and how to import it into a CaseMap case.

You can now email the ReportBook to recipients who want to import this layout and use it in another case.

### ⊟ To import a ReportBook definition from a file

1. In **CaseMap**, open the case for which you want to import a ReportBook file.
2. On the **Reports** tab, click **Tools**.
3. On the shortcut menu, click **Export and Import**, and then click **Import a ReportBook Definition from a File**.
4. In the **Select a ReportBook Definition file to Import** dialog box, navigate the folder where the file is stored and select it, then click **Open**.
5. In the message box to confirm the import, click **OK**.

   The imported ReportBook file is now listed in the Availabe ReportBooks box in the Manage ReportBooks dialog box.

   You can now generate this ReportBook to gather date for this case.

To import a ReportBook .cmrbk file, you must have CaseMap v5.0 or higher installed on your computer.

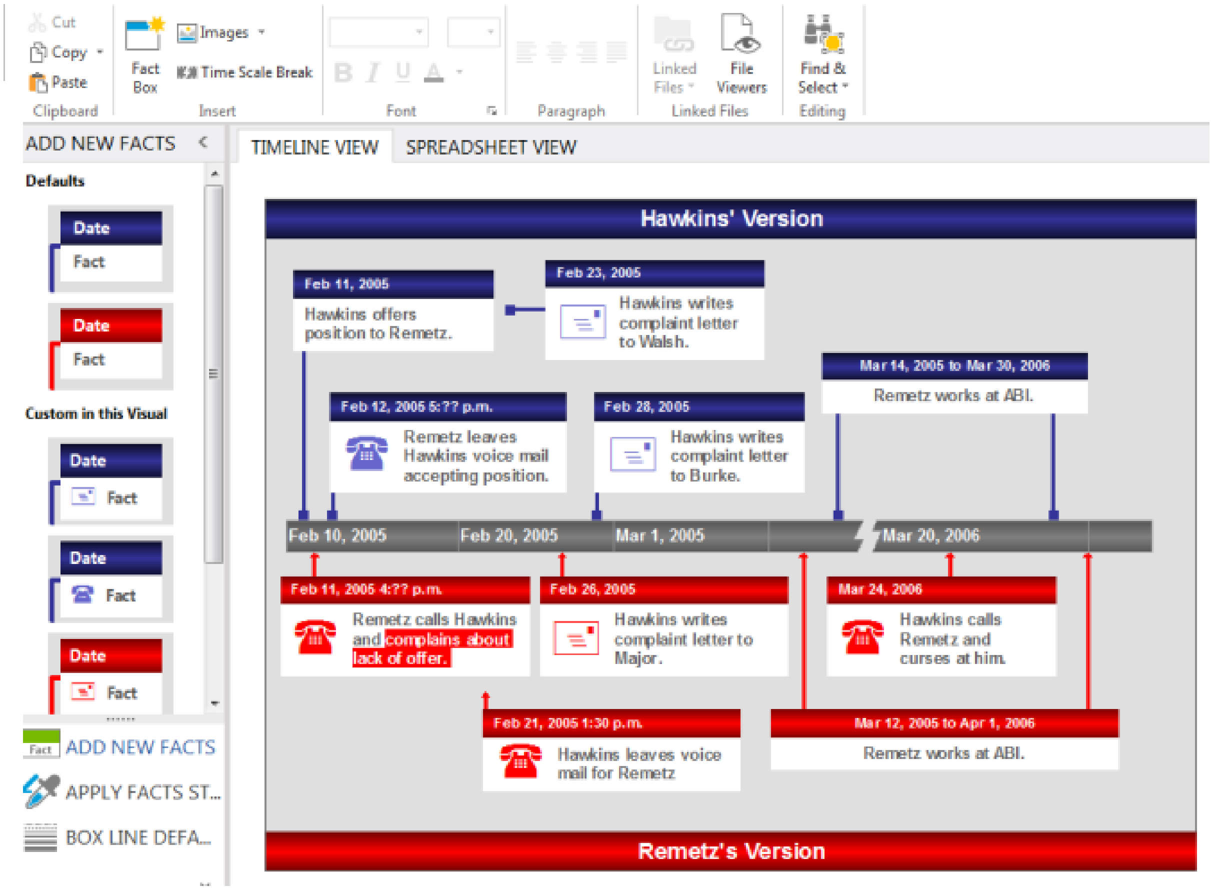
Related Topics

About creating ReportBooks
Printing pre-built ReportBooks
Creating custom ReportBooks
Managing ReportBooks

## Sending data to TimeMap

TimeMap® is a timeline graphing tool that allows you to import critical case facts from a CaseMap case so you can build a timeline to organize and chart them in a visual chronology.

Use TimeMap timelines during meetings to keep clients and staff up-to-date on case developments. Use TimeMap's presentation mode or enlarge and mount timelines for use in hearings and during trial so a jury or other large audience can view the facts illustrated into key points.


Cut
Copy
Paste
Clipboard
Fact Box
Images
Time Scale Break
Insert
Font
Paragraph
Linked Files
File Viewers
Linked Files
Find & Select
Editing
ADD NEW FACTS
Defaults
Date
Fact
Date
Fact
Custom in this Visual
Date
Fact
Date
Fact
Date
Fact
ADD NEW FACTS
APPLY FACTS ST...
BOX LINE DEFA...
TIMELINE VIEW
SPREADSHEET VIEW
Feb 10, 2005
Feb 20, 2005
Mar 1, 2005
Mar 20, 2006

Hawkins' Version

Feb 11, 2005 Hawkins offers position to Remetz.

Feb 23, 2005 Hawkins writes complaint letter to Walsh.

Mar 14, 2005 to Mar 30, 2006 Remetz works at ABI.

Feb 12, 2005 5:?? p.m. Remetz leaves Hawkins voice mail accepting position.

Feb 28, 2005 Hawkins writes complaint letter to Burke.

Feb 11, 2005 4:?? p.m. Remetz calls Hawkins and complains about lack of offer.

Feb 26, 2005 Hawkins writes complaint letter to Major.

Mar 24, 2006 Hawkins calls Remetz and curses at him.

Feb 21, 2005 1:30 p.m. Hawkins leaves voice mail for Remetz

Mar 12, 2005 to Apr 1, 2006 Remetz works at ABI.

Remetz's Version

To learn more about TimeMap or download a trial version, check out the Time Map information page on the LexisNexis website, or contact your LexisNexis Sales Representative.

## ⊟ To send a group of facts to TimeMap

1. In the **Case Shortcuts** pane, click the **Facts** icon to open the spreadsheet.
2. Run a filter on case records to include only those fact you want charted in the timeline.
3. On the **File** tab, click **Send to**, and then click **LexisNexis TimeMap**.
4. Under the **LexisNexis TimeMap** header, click the **Spreadsheet** button.

   Or press: **Shift**+**Ctrl**+**T**.
5. In the message box, click **OK** to continue.

   TimeMap automatically launches with the exported data charted in a new timeline.
6. In TimeMap, review the timeline to ensure that imported facts display properly and note any areas that need to be edited or filled in.

7. In TimeMap, click the **File** menu, and then click **Save** or **Save As** to name and save the new timeline.

> To send all spreadsheet records to a TimeMap timeline, right-click on a spreadsheet cell and select **Send To** > **LexisNexis TimeMap** > **Spreadsheet**. Or press **Shift**+**Ctrl**+**T**.

### To send individual facts to TimeMap

1. In the **Case Shortcuts** pane, click the **Facts** icon to open the spreadsheet.
2. Right-click on the fact record you want to export and click **Send To** > **LexisNexis TimeMap** > **Current Record**.

   Or press **Ctrl**+**T**.

   The fact record now displays in your TimeMap timeline.

> To send all spreadsheet records to a TimeMap timeline, right-click a spreadsheet and click **Send To** > **LexisNexis TimeMap** > **Spreadsheet**. Or press **Shift**+**Ctrl**+**T**.

### To send documents or event records to TimeMap

To make a timeline graph of records from the Documents or Events spreadsheets, ensure you have the Date field visible in your spreadsheet and then send the group of records to TimeMap. For sub-object spreadsheets, you will need to add a new field and select Date as the field type.

Related Topics

About exporting data

## Sending data to Sanction

To assist in organizing presentations of key evidence for trial, you can connect to and send documents from CaseMap to a case in LexisNexis® Sanction® 3.5 or higher.

### To send a document from CaseMap to Sanction

1. Open a case in Sanction 3.5 or higher.

> It is necessary to have a case open in Sanction for the Send To LexisNexis Sanction option to be successful.

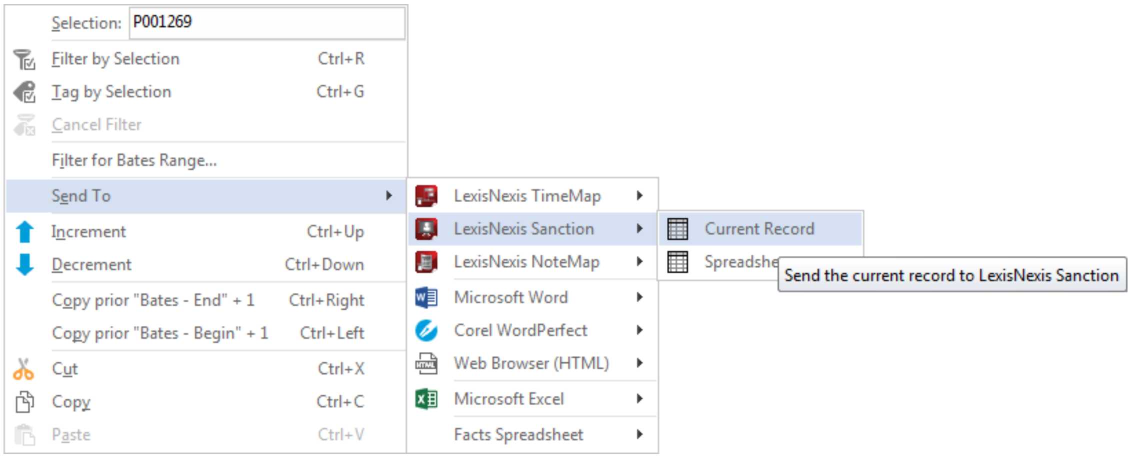
2. In the **Case Shortcuts** pane, click any Objects or Authorities spreadsheet (e.g.

**Documents**) to open it.

3. In the **Objects - Documents** list, select the record with a linked file that you want to send to Sanction.

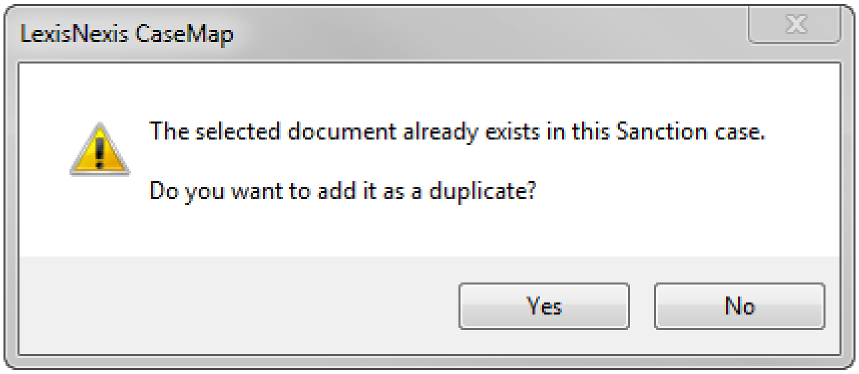
4. On the **File** tab, under the **Send To** option, click **LexisNexis Sanction**.

   From the Objects - Documents list, you can also right-click on the record being sent to Sanction, and then click the Send To > LexisNexis Sanction > Current Record.


Selection: P001269
Filter by Selection Ctrl+R
Tag by Selection Ctrl+G
Cancel Filter
Filter for Bates Range...
Send To
Increment Ctrl+Up
Decrement Ctrl+Down
Copy prior "Bates - End" + 1 Ctrl+Right
Copy prior "Bates - Begin" + 1 Ctrl+Left
Cut Ctrl+X
Copy Ctrl+C
Paste Ctrl+V
LexisNexis TimeMap
LexisNexis Sanction
LexisNexis NoteMap
Microsoft Word
Corel WordPerfect
Web Browser (HTML)
Microsoft Excel
Facts Spreadsheet
Current Record
Spreadshe
Send the current record to LexisNexis Sanction

**If the document was previously sent to Sanction**

If the document was previously sent to Sanction, the following dialog message is displayed.


LexisNexis CaseMap

The selected document already exists in this Sanction case.

Do you want to add it as a duplicate?

Yes
No

Perform one of the following to continue:

- Click **Yes** to continue and duplicate the document in Sanction.
- Click **No** if you do not want to duplicate the document and to cancel the Send To command.

5. On the **LexisNexis Sanction** submenu, click **Current Record** to send the selected record to the Exhibits subfolder in Sanction called, From CaseMap.

⊟ **To send multiple documents to Sanction**

1. Open a case in Sanction 3.5 or higher.

> It is necessary to have a case open in Sanction for the Send To LexisNexis Sanction option to be successful.

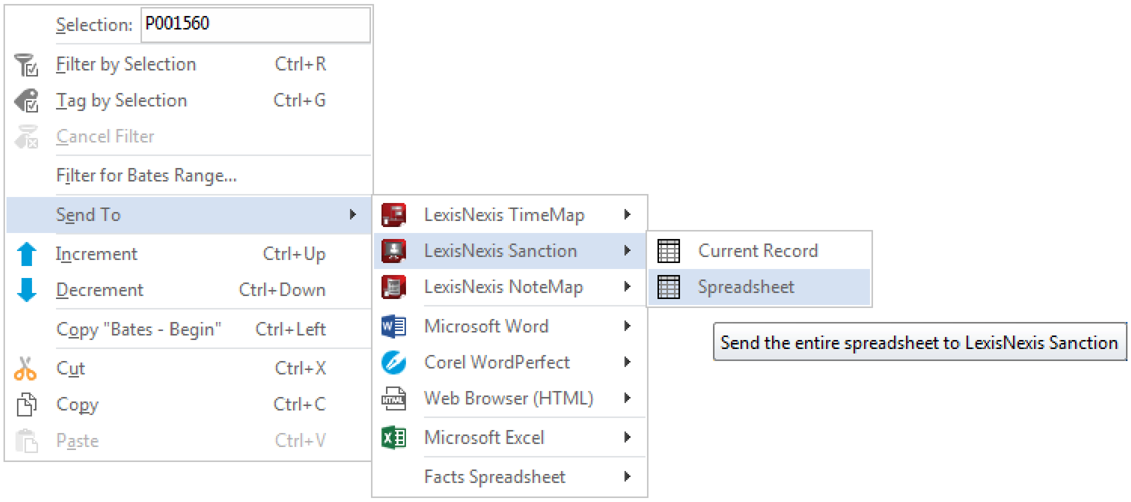
2. In the **Case Shortcuts** pane, click any Objects or Authorities spreadsheet (e.g. **Documents**) to open it.

3. Optional: In the **Objects - Documents** list, filter down to the records that you want to send to Sanction.

> You can control what is sent to Sanction by filtering the spreadsheet.

4. On the **File** menu, under the **Send To** option, click **LexisNexis Sanction**.

   From the Objects - Documents list, you can also right-click on the record being sent to Sanction, click the Send To option and then click LexisNexis Sanction.



Selection: P001560

Filter by Selection Ctrl+R
Tag by Selection Ctrl+G
Cancel Filter
Filter for Bates Range...
Send To
Increment Ctrl+Up
Decrement Ctrl+Down
Copy "Bates - Begin" Ctrl+Left
Cut Ctrl+X
Copy Ctrl+C
Paste Ctrl+V
LexisNexis TimeMap
LexisNexis Sanction
LexisNexis NoteMap
Microsoft Word
Corel WordPerfect
Web Browser (HTML)
Microsoft Excel
Facts Spreadsheet
Current Record
Spreadsheet
Send the entire spreadsheet to LexisNexis Sanction

5. On the **LexisNexis Sanction** submenu, click **Spreadsheet** to send the entire spreadsheet to the Exhibits subfolder called 'From CaseMap' in Sanction.

Related Topics

About exporting data

## Sending data to NoteMap

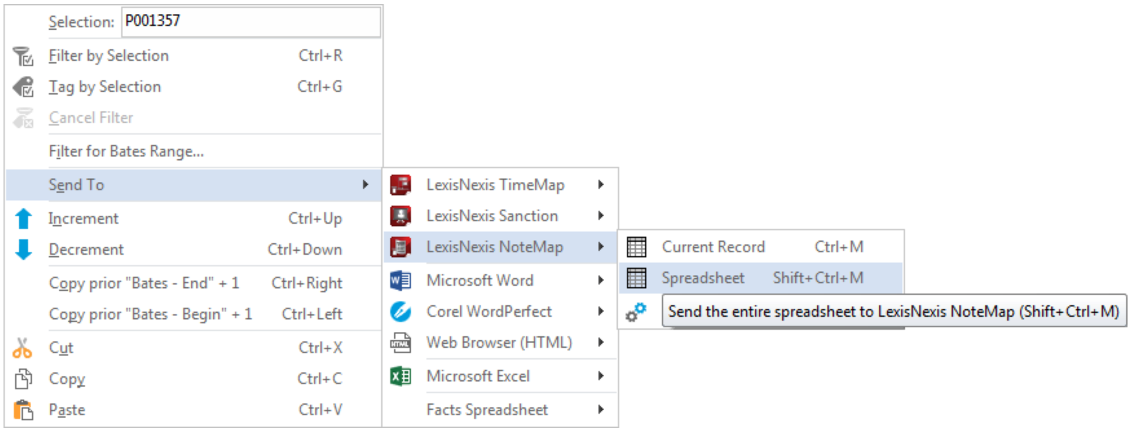
A companion product of CaseMap, NoteMap® is an outlining tool that offers many features that allow you to produce outlines in ways a traditional word processing program does not. You can send data from any CaseMap spreadsheet directly to a NoteMap outline and import a NoteMap outline into the Issues spreadsheet of CaseMap.

To learn more about NoteMap®, download a free 30-day trial version at www.lexisnexis.com or contact your LexisNexis CaseMap account representative at 866-316-8525.

### To export spreadsheet data to NoteMap

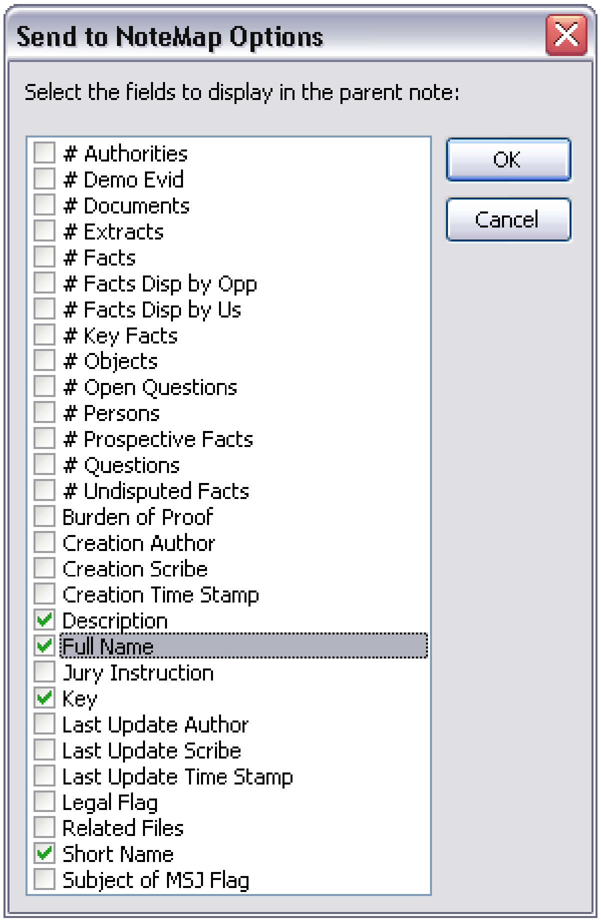
1. In the **Case Shortcuts** pane, click any Objects or Authorities spreadsheet (e.g. **Documents**) to open it.
2. In the **Objects - Documents** list, select the record with a linked file that you want to send to Sanction.
3. On the **File** tab, under the **Send To** option, click **LexisNexis NoteMap**.

   From the Objects - Documents list, you can also right-click on the record being sent to NoteMap, and then click the Send To > LexisNexis NoteMap > Spreadsheet.


Selection: P001357
Filter by Selection Ctrl+R
Tag by Selection Ctrl+G
Cancel Filter
Filter for Bates Range...
Send To
Increment Ctrl+Up
Decrement Ctrl+Down
Copy prior "Bates - End" + 1 Ctrl+Right
Copy prior "Bates - Begin" + 1 Ctrl+Left
Cut Ctrl+X
Copy Ctrl+C
Paste Ctrl+V
LexisNexis TimeMap
LexisNexis Sanction
LexisNexis NoteMap
Microsoft Word
Corel WordPerfect
Web Browser (HTML)
Microsoft Excel
Facts Spreadsheet
Current Record Ctrl+M
Spreadsheet Shift+Ctrl+M
Send the entire spreadsheet to LexisNexis NoteMap (Shift+Ctrl+M)

4. Under the **LexisNexis NoteMap** header, click the **Spreadsheet** button.

   Or use the keyboard shortcut: SHIFT + CTRL + T.
5. In the **Send to NoteMap Options** dialog box, select the check boxes for each field you want to include as a parent note in the NoteMap outline, then click **OK**.

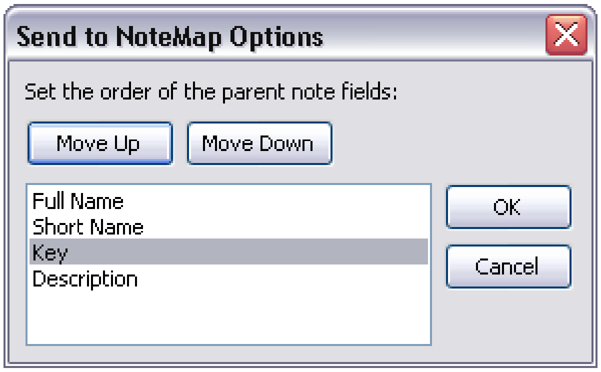


Select the fields to display in the parent note:

☐ # Authorities
☐ # Demo Evid
☐ # Documents
☐ # Extracts
☐ # Facts
☐ # Facts Disp by Opp
☐ # Facts Disp by Us
☐ # Key Facts
☐ # Objects
☐ # Open Questions
☐ # Persons
☐ # Prospective Facts
☐ # Questions
☐ # Undisputed Facts
☐ Burden of Proof
☐ Creation Author
☐ Creation Scribe
☐ Creation Time Stamp
☑ Description
☑ Full Name
☐ Jury Instruction
☑ Key
☐ Last Update Author
☐ Last Update Scribe
☐ Last Update Time Stamp
☐ Legal Flag
☐ Related Files
☑ Short Name
☐ Subject of MSJ Flag

Each record in the spreadsheet becomes a parent note in NoteMap.

6. In the next dialog box, click the **Move Up** and **Move Down** buttons to organize the parent note field order, then click **OK**.



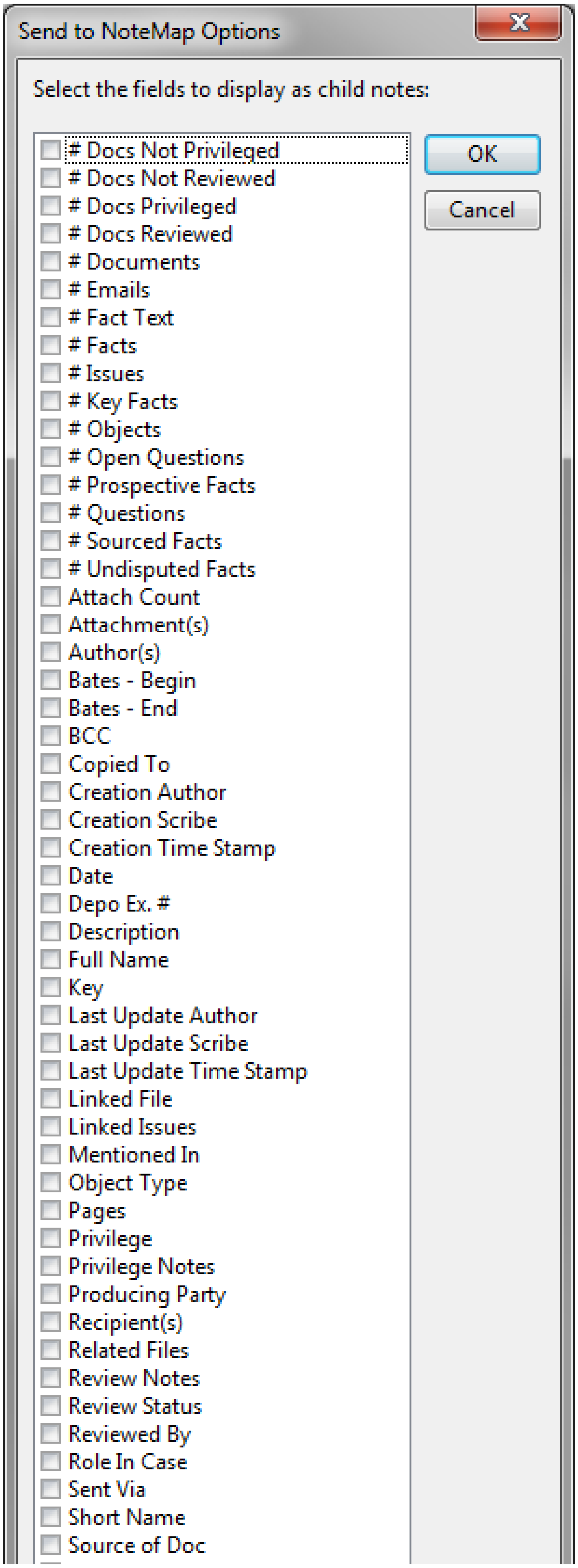
Set the order of the parent note fields:

Full Name
Short Name
Key
Description

7. 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**.



Select the fields to display as child notes:

☐ # Docs Not Privileged
☐ # Docs Not Reviewed
☐ # Docs Privileged
☐ # Docs Reviewed
☐ # Documents
☐ # Emails
☐ # Fact Text
☐ # Facts
☐ # Issues
☐ # Key Facts
☐ # Objects
☐ # Open Questions
☐ # Prospective Facts
☐ # Questions
☐ # Sourced Facts
☐ # Undisputed Facts
☐ Attach Count
☐ Attachment(s)
☐ Author(s)
☐ Bates - Begin
☐ Bates - End
☐ BCC
☐ Copied To
☐ Creation Author
☐ Creation Scribe
☐ Creation Time Stamp
☐ Date
☐ Depo Ex. #
☐ Description
☐ Full Name
☐ Key
☐ Last Update Author
☐ Last Update Scribe
☐ Last Update Time Stamp
☐ Linked File
☐ Linked Issues
☐ Mentioned In
☐ Object Type
☐ Pages
☐ Privilege
☐ Privilege Notes
☐ Producing Party
☐ Recipient(s)
☐ Related Files
☐ Review Notes
☐ Review Status
☐ Reviewed By
☐ Role In Case
☐ Sent Via
☐ Short Name
☐ Source of Doc

8. In the message box indicating the number of records being exported, click **OK**.
9. In the message box indicating the all data has been copied to a clipboard, click **OK**.
10. In **NoteMap**, click the **New** button on the **File** menu to open a blank outline.
11. Click the **Paste** button on the **Standard** toolbar to paste your spreadsheet data into the outline.

    Notice that all parent and child notes now display as you selected them.

12. On the **File** menu, click **Save** to name and save your new outline.

Related Topics

About exporting data
Sending data to TimeMap
Importing a NoteMap outline

## 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 row are listed vertically, one below the other.

When exporting to HTML, CaseMap creates a series of HTML pages and also builds in a first page, prior page, next page, last page navigation bar that makes it easy to browse through the report. You can export to the following options: Web pages, Zip as Web Pages, or Zip and Email as Web Pages.

⊟ **To export spreadsheet data**

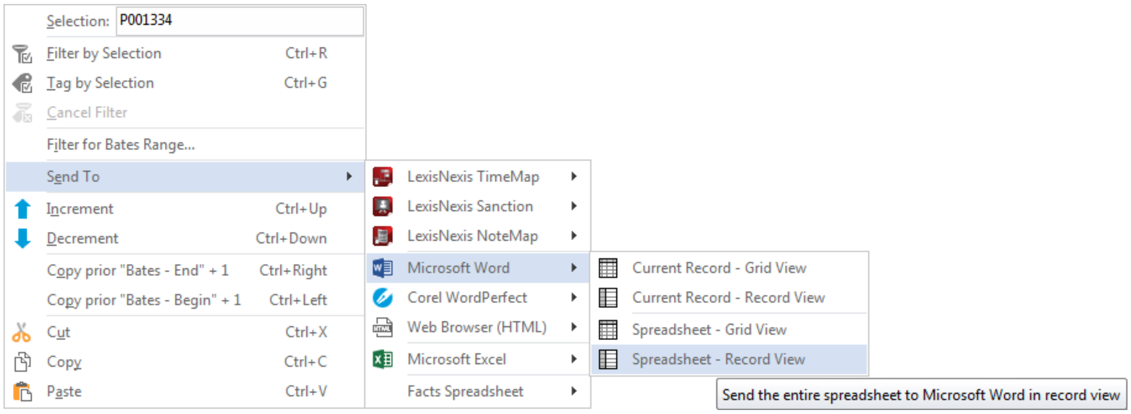
1. In the **Case Shortcuts** pane, click the icon for the spreadsheet you want to use.
2. On the **File** tab, under the **Send To** option, click one of the following (e.g., **Microsoft Word**):

    **Microsoft Word**

    **Corel WordPerfect**

    **Web Browser (HTML)**

    From the Objects - Documents list, you can also right-click on the record being sent, and then click the Send To > [Microsoft Word, Corel WordPerfect, or Web Browser (HTML] > Spreadsheet [Grid View or Record View].


Selection: P001334
Filter by Selection Ctrl+R
Tag by Selection Ctrl+G
Cancel Filter
Filter for Bates Range...
Send To
Increment Ctrl+Up
Decrement Ctrl+Down
Copy prior "Bates - End" + 1 Ctrl+Right
Copy prior "Bates - Begin" + 1 Ctrl+Left
Cut Ctrl+X
Copy Ctrl+C
Paste Ctrl+V
LexisNexis TimeMap
LexisNexis Sanction
LexisNexis NoteMap
Microsoft Word
Corel WordPerfect
Web Browser (HTML)
Microsoft Excel
Facts Spreadsheet
Current Record - Grid View
Current Record - Record View
Spreadsheet - Grid View
Spreadsheet - Record View
Send the entire spreadsheet to Microsoft Word in record view

3. Under the **Microsoft Word** header, click the **Spreadsheet Record View** or **Spreadsheet Grid View** button.

   Or use the keyboard shortcut: SHIFT + CTRL + T.

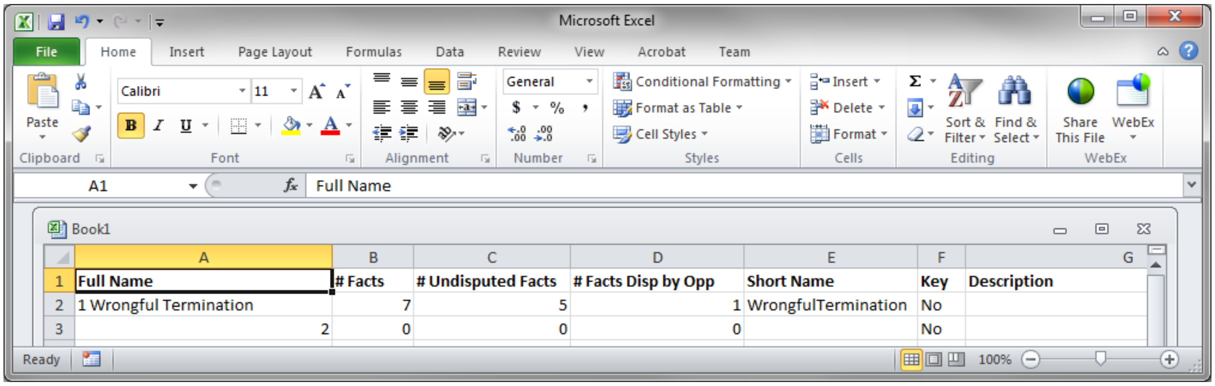
   The native application automatically launches and displays the spreadsheet data you exported.

**Related Topics**

About exporting data
Exporting data to Excel
Printing reports

## Exporting data to Excel

CaseMap spreadsheet data exports cleanly into a Microsoft® Excel spreadsheet, where fields and columns, and cells and fields, automatically synchronize between the two applications.


Microsoft Excel
File
Home
Insert
Page Layout
Formulas
Data
Review
View
Acrobat
Team
Paste
Calibri
11
General
Conditional Formatting
Format as Table
Cell Styles
Insert
Delete
Format
Sort & Filter
Find & Select
Share This File
WebEx
Clipboard
Font
Alignment
Number
Styles
Cells
Editing
WebEx
Book1
Ready
100%

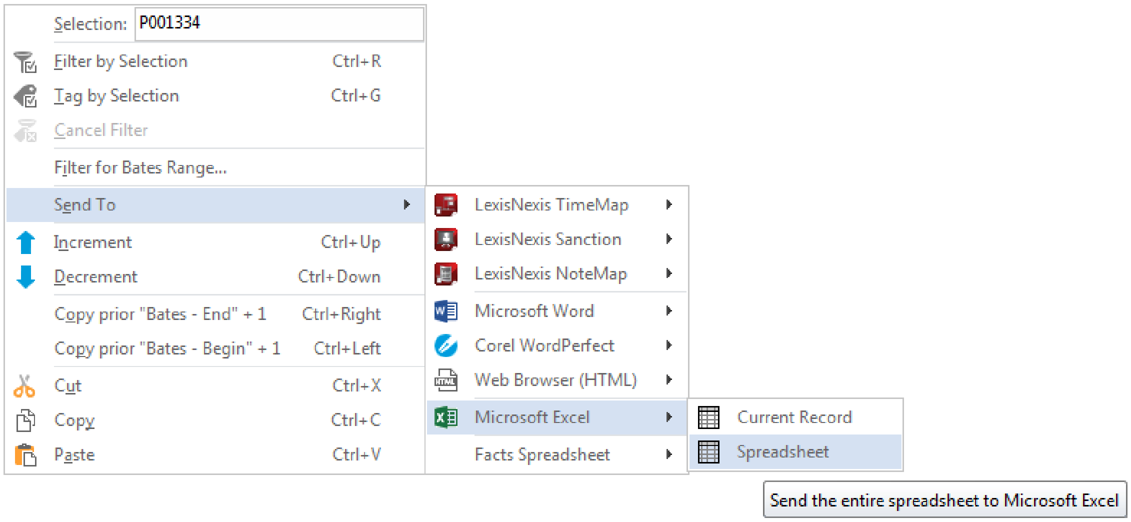
A1 Full Name

| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | Full Name | # Facts | # Undisputed Facts | # Facts Disp by Opp | Short Name | Key | Description |
| 2 | 1 Wrongful Termination | 7 | 5 | 1 | WrongfulTermination | No | |
| 3 | 2 | 0 | 0 | 0 | | No | |

### ⊟ To export data to Excel

1. In the **Case Shortcuts** pane, click any Objects or Authorities spreadsheet (e.g., **Documents**) to open it.
2. In the **Objects - Documents** (example used) list, select the record with a linked file that you want to send to Sanction.
3. On the **File** tab, under the **Send To** option, click **Microsoft Excel**.

   From the Objects - Documents list, you can also right-click on the record being sent to Microsoft Excel, and then click the Send To > Microsoft Excel > Spreadsheet.


Selection: P001334
Filter by Selection Ctrl+R
Tag by Selection Ctrl+G
Cancel Filter
Filter for Bates Range...
Send To
Increment Ctrl+Up
Decrement Ctrl+Down
Copy prior "Bates - End" + 1 Ctrl+Right
Copy prior "Bates - Begin" + 1 Ctrl+Left
Cut Ctrl+X
Copy Ctrl+C
Paste Ctrl+V
LexisNexis TimeMap
LexisNexis Sanction
LexisNexis NoteMap
Microsoft Word
Corel WordPerfect
Web Browser (HTML)
Microsoft Excel
Facts Spreadsheet
Current Record
Spreadsheet
Send the entire spreadsheet to Microsoft Excel

4. Under the **Microsoft Excel** header, click the **Spreadsheet** button.

   Or use the keyboard shortcut: SHIFT + CTRL + T.

   Microsoft Excel automatically launches and displays the spreadsheet data you exported.

Related Topics

[About exporting data]
[Exporting data to Word, WordPerfect, HTML]
[About printing reportsl]

# *Keyboard Shortcuts*

## About keyboard shortcuts

CaseMap offers numerous keyboard shortcuts for the application, spreadsheet views, dialog boxes, and Bates numbering in the Documents spreadsheet. You can also create your own keyboard shortcut and edit existing ones.

**In this section**

Application keyboard shortcuts
Spreadsheet view keyboard shortcuts
Fact Cards keyboard shortcuts
Dialog box keyboard shortcuts
Bates numbering keyboard shortcuts
Customizing keyboard shortcuts

## Application keyboard shortcuts

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

**Keyboard Shortcuts: Application**

| Shortcut Key | Action |
|---|---|
| F10 | Activate the File tab. |
| Alt + Spacebar | Open the system menu with choices to restore, move, or resize the window. |
| Esc | Close message boxes. |
| Alt + F4 | Close CaseMap (without an open dialog box). |
| Ctrl + O | Open the Connect to CaseMap Server dialog box to open a SQL case. |

Related Topics

Dialog box keyboard shortcuts

Spreadsheet view keyboard shortcuts
Customizing keyboard shortcuts
Fact Cards keyboard shortcuts

## Spreadsheet view keyboard shortcuts

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

**Keyboard Shortcuts: Spreadsheet Views**

| Shortcut Key | Action |
|---|---|
| Insert | Add a new record to any spreadsheet. |
| Ctrl + Insert | Insert a copy of the selected record. |
| Ctrl + ' | Copy the contents of the above field. |
| Esc | Undo changes made to a record prior to refreshing. |
| Delete | Delete characters or contents of the selected field. |
| Ctrl + Delete | Delete a record. |
| F1 | Open online help. |
| F2 | Access Edit mode within a cell. |
| Ctrl + F2 | Open the Object Detail box. |
| F5 | Refresh the spreadsheet view. |
| F7 | Open the Spell Check tool. |
| Shift + F10 | Display the shortcut (right-click) menu that includes cut, copy, and paste functions. |
| Ctrl + 1 | Open the Facts spreadsheet. |
| Ctrl + 2 | Open the Objects–Documents spreadsheet. |
| Ctrl + 3 | Open the Issues spreadsheet. |

| Keyboard Shortcuts: Spreadsheet Views | |
|---|---|
| **Shortcut Key** | **Action** |
| Ctrl + 4 | Open the Questions spreadsheet. |
| Ctrl + 5 | Open the Research Authorities spreadsheet. |
| Ctrl + 6 | Open the Research – Extracts from Authorities spreadsheet. |
| Ctrl + 7 | Open the Research – Authorities and Extracts spreadsheet. |
| Ctrl + A | Opens the Add Object dialog box when you are in any of the description fields, such as Fact Text, Source(s), Author(s), and Recipient(s) that have the link icon in the field header. |
| Ctrl + C | Copy selected text to clipboard. |
| Ctrl + D | Open the Object Detail dialog box for the highlighted object short name in the Fact Text, Source(s), or Queston Text fields. |
| Ctrl + E | Post changes to a record when editing an existing record or adding a record. |
| Ctrl + F | Open the Find dialog box. |
| Ctrl + G | Run an instant tag. |
| Ctrl + H | Open the Replace dialog box. |
| Ctrl + O | Open the Connect to CaseMap Server dialog box to open a SQL case. |
| Ctrl + P | Opens the Print dialog box. |
| Ctrl+ R | Runs an instant filter on any value that you select in any spreadsheet cell. |
| Ctrl + V | Paste text from clipboard. |
| Ctrl + X | Cut selected text to the clipboard. |
| Ctrl + Z | Undo changes made to a text or description field prior to refreshing. |
| Ctrl + Shift + Z | Redo changes made to a text or description field prior to refreshing. |
| Ctrl + Spacebar | Open the Link Assistant when you are working in one of the description fields, such as Fact Text, Source(s), Author(s), and Recipient(s). |
| Spacebar | Toggle the state of check boxes or option buttons. |

| Keyboard Shortcuts: Spreadsheet Views | |
|---|---|
| **Shortcut Key** | **Action** |
| Home | Move cursor to the beginning of a line within a cell.<br>Move cursor to the first cell in a spreadsheet record. |
| End | Move cursor to the end of a line within a cell.<br>Move cursor to the first cell in a spreadsheet record. |
| Ctrl + Home | Move the cursor to the beginning of text within a cell.<br>Move cursor to the beginning of the transcript.<br>Move the selected cell to the first record of a column when a cell is selected (highlighted). |
| Ctrl + End | Move the cursor to the end of the text within a cell.<br>Move cursor to the end of the transcript.<br>Move the selected cell to the last record of a column when a cell is selected (highlighted). |
| Tab | Move selection to the next cell to the right in a spreadsheet row (excluding read-only fields). |
| Shift + Tab | Move selection back one cell to the left in a spreadsheet row. |
| Left or Right Arrow | Move selection left or right across cells in a single record. |
| Up or Down Arrow | Move selection up or down across cells in a single field. |
| Ctrl + Up or Down Arrow | Move the selected cell to the first or last record in a column. |
| Ctrl + Shift + Left Arrow | Select the entire word to the left of the cursor position. |
| Ctrl + Shift + Right Arrow | Select the entire work to the right of the cursor position. |
| Alt + Down Arrow | Open the dialog box associated with clicking the Ellipsis button (...) in a cell.<br>Open a list of options associated with a cell, such an open-ended lists. |
| Ctrl + Left or Right Arrow | Move the cursor one word at a time left or right from the current position within a cell.<br>Move the selected cell to the first or last cell in the spreadsheet record. |

Related Topics

- Application keyboard shortcuts
- Spreadsheet view keyboard shortcuts
- Customizing keyboard shortcuts
- Fact Cards keyboard shortcuts

## Fact Cards view keyboard shortcuts

The following list includes the default keyboard shortcuts you can use in CaseMap for the Fact Cards view. You can also customize keyboard shortcuts.

> The selected item is indicated by a dotted border when navigating using the arrows. This is valid for the list of issues and the fact cards.

**Keyboard Shortcuts: Fact Cards**

| **Shortcut Key - Issues** | **Action** |
|---|---|
| Tab | Move cursor around to the Issues pane, Fact Cards, and SmartAssist. |
| Arrow keys | Navigate between the issues in the issues pane. Navigates between the fact cards. |
| Shift + Tab | Move cursor backwards within a dialog box. |
| Spacebar | Select the highlighted fact card and displays the assigned issues. |
| Spacebar | Assign and unassign issues to the selected fact card. |
| Ctrl + F2 | Open the Fact Detail. |

| **Shortcut Keys - Evaluation** | **Action** |
|---|---|
| Tab | Move cursor around to the Evaluation pane, Fact Cards, and |

| Keyboard Shortcuts: Fact Cards | |
|---|---|
| **Shortcut Key - Issues** | **Action** |
| | SmartAssist. |
| Arrow keys | Navigate between the evaluation statuses. Navigates between the fact cards. |
| Spacebar | Select the highlighted fact card and displays the assigned evaluation status. |
| Spacebar | Reassign evaluation status to the selected fact card. |
| Ctrl + F2 | Open the Fact Detail. |
| | |
| **Shortcut Keys - Uncategorized Facts** | **Action** |
| Alt + U | Expand/collapse the Uncategorized Facts section. |
| | |
| **Shortcut Keys - Unevaluated Facts** | **Action** |
| Alt + U | Expand/collapse the Unevaluated Facts section. |
| | |

Related Topics

Application keyboard shortcuts
Spreadsheet view keyboard shortcuts
Customizing keyboard shortcuts

## 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

| Shortcut Key | Action |
|---|---|
| Tab | Move cursor around a dialog box (top to bottom, left to right). |
| Shift + Tab | Move cursor backwards within a dialog box. |
| Ctrl + Z | Undo changes made to a text or description field prior to refreshing. |
| Ctrl + C | Copy selected text to clipboard. |
| Ctrl + X | Cut selected text to the clipboard. |
| Ctrl + V | Paste selected text to the clipboard. |
| Right or Left Arrow | Move selection left or right across cells in a single record. |
| Up or Down Arrow | Move selection up or down across cells in a single field. |
| Shift + Up or Down Arrow | Select an entire line of text to the left or the right of the cursor. |
| Ctrl + Left or Right Arrow | Move the cursor one word at a time left or right from the current position (in Edit mode). |
| Home | Move cursor to the beginning of a line of text. |
| End | Move cursor to the end of a line of text. |
| Shift + F10 | Display the Edit menu to cut, copy, and paste. |
| Esc | Close message boxes. |
| ALT + F4 | Close dialog boxes. |
| ALT + E | Extract metadata when importing linked files. |
| ALT + D | Do not extract metadata when importing linked files. |
| ALT + U | Use Beginning Bates number in the document production wizard. |
| ALT + T | Location radio button in the document production wizard. |

Related Topics

[Application keyboard shortcuts]
[Spreadsheet keyboard shortcuts]

Customizing keyboard shortcuts
Fact Cards keyboard shortcuts

## 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 values does not alter the Bates stamp on the physical document.

**Keyboard Shortcuts: Bates numbering**

| Shortcut Key | Action |
|---|---|
| Ctrl + Right Arrow | Copies the value of the last record's Bates-End cell and increments it by one in the Bates–Begin cell |
| Ctrl + Up Arrow | Increments the value of the Bates-Begin and Bates–End cells by one |
| Ctrl + Down Arrow | Decrements the value of the Bates-Begin and Bates–End cells by one |

Related Topics

Application keyboard shortcuts
Spreadsheet view keyboard shortcuts
Dialog box keyboard shortcuts
Customizing keyboard shortcuts
Fact Cards keyboard shortcuts

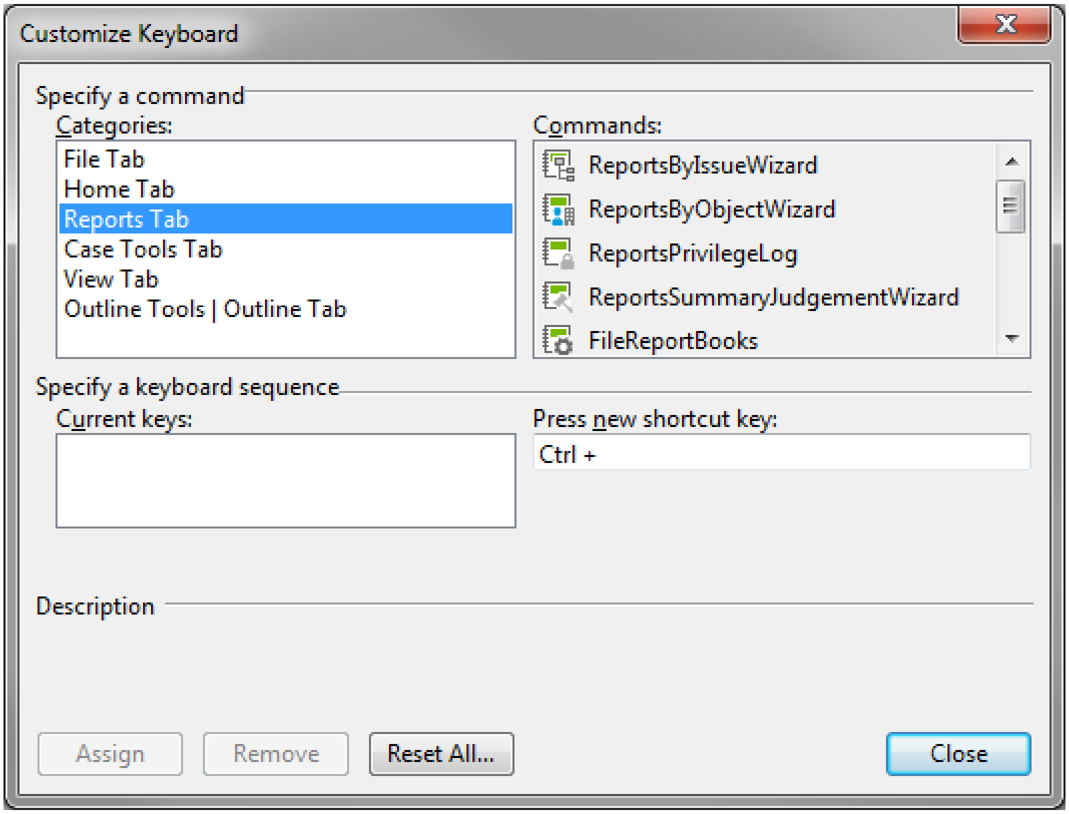
## Customizing keyboard shortcuts

You can add shortcut keys, or edit the function of existing shortcut keys.

### ⊟ To customize keyboard shortcuts

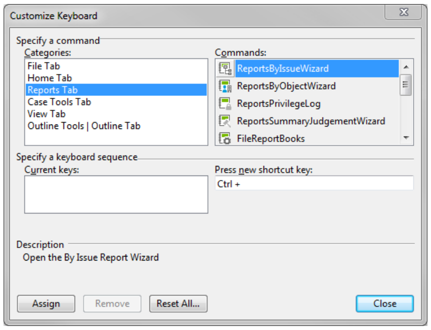
1. Click the **Quick Access Toolbar** icon, and then select **Customize Keyboard Shortcuts**.

You can also right-click on any ribbon and then select Customize Keyboard Shortcuts.


Customize Keyboard
Specify a command
Categories:
File Tab
Home Tab
Reports Tab
Case Tools Tab
View Tab
Outline Tools | Outline Tab
Commands:
ReportsByIssueWizard
ReportsByObjectWizard
ReportsPrivilegeLog
ReportsSummaryJudgementWizard
FileReportBooks
Specify a keyboard sequence
Current keys:
Press new shortcut key:
Ctrl +
Description
Assign
Remove
Reset All...
Close

2. In the **Categories** list, select the menu (e.g., Reports ribbon) for which you want to assign a command.

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


Customize Keyboard
Specify a command
Categories:
File Tab
Home Tab
Reports Tab
Case Tools Tab
View Tab
Outline Tools | Outline Tab
Commands:
ReportsByIssueWizard
ReportsByObjectWizard
ReportsPrivilegeLog
ReportsSummaryJudgementWizard
FileReportBooks
Specify a keyboard sequence
Current keys:
Press new shortcut key:
Ctrl +
Description
Open the By Issue Report Wizard
Assign
Remove
Reset All...
Close

If there is already a keyboard shortcut for this category or command, it will display in the Current keys box with a description below indicating its current use.

5. In the **Press new shortcut key** box, type in the shortcut key you want to use (ex: Ctrl +S).

6. Click the **Assign** button to save the custom shortcut key.

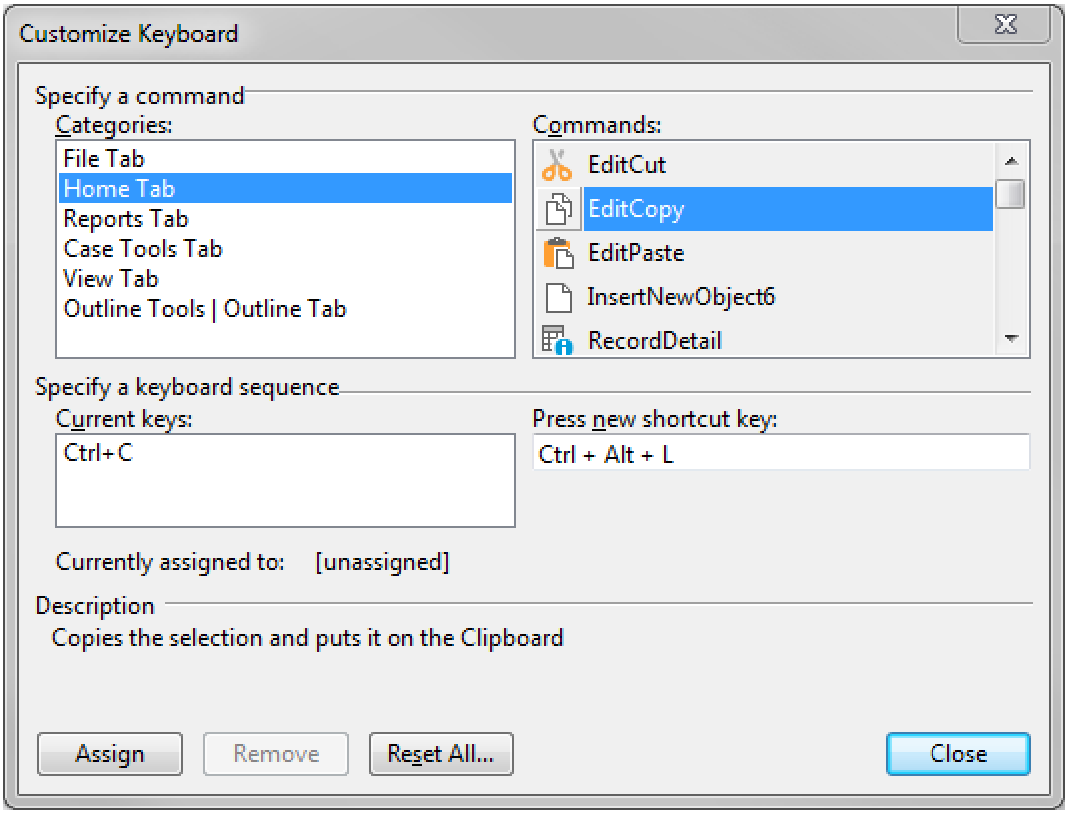
7. Click **Close** twice to return to CaseMap.

### To remove an existing keyboard shortcut

1. On the **Quick Access Toolbar**, select **Customize Keyboard Shortcuts**.

   You can also right-click on any ribbon or the Quick Access Toolbar.

2. Select the category that contains the shortcut you want to change, e.g., Home ribbon, then select the command you want to assign to the keyboard shortcut.



Customize Keyboard

Specify a command

Categories: File Tab, Home Tab (selected), Reports Tab, Case Tools Tab, View Tab, Outline Tools | Outline Tab

Commands: EditCut, EditCopy (selected), EditPaste, InsertNewObject6, RecordDetail

Specify a keyboard sequence

Current keys: Ctrl+C

Press new shortcut key: Ctrl + Alt + L

Currently assigned to: [unassigned]

Description

Copies the selection and puts it on the Clipboard

3. In the **Current keys** box, highlight the keyboard combination and click the **Remove** button.

4. Click **Close** twice to return to CaseMap.

> If you click the Reset All button, all key commands return to their original default settings.

Related Topics

[Application keyboard shortcuts]

[Dialog box keyboard shortcuts]

[Spreadsheet view keyboard shortcuts]

[Fact Cards view keyboard shortcuts]

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