CaseMap SharePoint Web Parts
User Guide

CaseMap® SharePoint Web Parts v1.0

- **Installing CaseMap SharePoint Web Parts**
- **Managing Case Data**

LexisNexis®

Using the CaseMap SharePoint Web Parts

CaseMap®
CaseMap® Server
TextMap®
TimeMap®
Sanction®
Concordance®

Version: CaseMap® Server 2.3, CaseMap® Admin Console 2.3, CaseMap® SharePoint Web Parts 1.0

Release: September 26, 2017

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CaseMap SharePoint Web Parts

User Guide

What's New in Version 2.3

Chapter

1

What's New in Version 2.3

The following enhancements are included in the CaseMap Server and CaseMap Admin Console 2.3 release, September 26, 2017.

⊟ **Upgrade previous versions of SQL cases to CaseMap v13**

Use the CaseMap Admin Console to upgrade your existing CaseMap SQL case(s) to CaseMap 13.

For more information, see Upgrading cases.

For information on previous CaseMap Server and CaseMap Admin Console releases, please see the Release Notes.

Related Topics

About CaseMap Server

System requirements

CaseMap SharePoint Web Parts

User Guide

Using the CaseMap SharePoint Web Parts

Chapter

2

Using the CaseMap SharePoint Web Parts

About CaseMap SharePoint Web Parts

The CaseMap SharePoint Web Parts site allows you to display CaseMap spreadsheet data so that case staff can quickly view case data in a central location — without having to manually retrieve data from the case. The CaseMap SharePoint Web Parts site is essentially the equivalent of publishing a CaseMap report to the Internet, allowing case staff who do not have access to CaseMap to view case data. Case data that can be displayed includes spreadsheets, issue outlines, and a list of team members/staff assigned to the case. A case hyperlink can also be added so that you can open a case file in CaseMap directly from the site page.

Issue Outline		Team Members	
1 Wrongful Termination		Sales 1	
⊟ 2 Age Discrimination		System Administrator	
2.1 Hawkins Specific		Chris Attorney	
2.2 Pattern & Practice		Frank Investigator	
⊟ 3 Retaliation		Susan Litigator	
3.1 Transfer		Dave Paralegal	
3.2 Demotion		Mike Legal Secratary	
4 Deserved Termination			
⊟ 5 Damages			
5.1 Failure to Mitigate			
5.2 Lost Wages			
5.3 Mental Anguish			

Cast of Characters

Full Name	Role In Case	Type	Addresses	Address: E-mail
Hon. Julian Coffman	Judge in California State Court - Orange County who's been assigned the case.	Judge	123 Courthouse Way Somewhere, FL 32082	jcoffman@email.com
Linda Collins	Anstar Biotech Industries Sales Manager - Philip Hawkins made derogatory comments about her to Karen Thomas at company 4th of July picnic.	Fact Witness	778 Hollywood Blvd Nowhere, FL 33332	lcollins@abi.com
Randy Fosheim	Anstar Biotech Industries plant manager - Was at the 4th of July Picnic where Philip Hawkins apparently made derogatory remarks to Linda Collins. Survived the Reduction in Force.	Fact Witness		rfosheim@abi.com
Anne Freeman	Plaintiff damage expert	Expert Witness	1111 Experts Ln Orlando, FL	afreeman@experts.com
Philip Hawkins	Plaintiff - Former Vice President of Sales at Anstar Biotech Industries.	Fact Witness	435 Water St, Jacksonville, FL	phawkins@mymail.com

1 2 3

The CaseMap SharePoint Web Parts site contains four web part options specific to CaseMap for you to use to display case data:

- CaseMap - Case Issue Outline
- CaseMap - Case Spreadsheet Data
- CaseMap - Case Team Members
- CaseMap - Case Link

The CaseMap SharePoint Web Parts are connected using Active Directory, so case staff can open a web parts page displaying their assigned case data without having to log on to CaseMap. This set up ensures that each case's web page data is restricted to only those users who are assigned to view it.

The CaseMap SharePoint Web Parts site require and connect with the CaseMap Server and is compatible with CaseMap v9.0 (SQL version). You must test the connection with the CaseMap Server to verify that the service URL and credentials are valid. When the connection succeeds, you can then access a list of active SQL cases that you can publish case data from and display on the CaseMap Sharepoint Web Parts site.

> 📝 You must have admin rights to the CaseMap Server/CaseMap Admin Console in order to

install the CaseMap SharePoint Web Parts. The CaseMap Server must be installed and set up before you can install and begin using the CaseMap SharePoint Web Parts.

📝 During configuration, if you change the URL, authentication type, or user credentials, then you must start the configuration process over again.

Related Topics

System requirements v1.0
Deploying the CaseMap SharePoint Web Parts

Installing CaseMap SharePoint Web Parts

System requirements v1.0

The CaseMap SharePoint Web Parts site is the Microsoft Office SharePoint Server site and content management web part that allows you to connect the CaseMap Server and publish spreadsheet data from CaseMap SQL cases — without having to manually retrieve data from case files. CaseMap data is then published to this central location for case staff to access easily without having to open a case to view it.

CaseMap SharePoint Web Server requires the following:

- CaseMap v9.0+ (SQL version)
- CaseMap Server v1.6+
- Microsoft Windows Server 2003 or 2008
- Microsoft Office SharePoint Server 2003 or 2007

The CaseMap SharePoint Web Parts must be deployed from Microsoft Office SharePoint Server 2003 or 2007.

📝 You must have admin rights to the CaseMap Server/CaseMap Admin Console in order to install the CaseMap SharePoint Web Parts. The CaseMap Server must be installed and set up before you can install and begin using the CaseMap SharePoint Web Parts.

📝 To launch a CaseMap case effectively from the hyperlink on the site page, you must be using Microsoft Internet Explorer. Opening a case from the site page does not work well with Mozilla Firefox and other Internet browsers.

Related Topics

Deploying the CaseMap SharePoint Web Parts

Installing CaseMap Server

Deploying the CaseMap SharePoint Web Parts

The CaseMap SharePoint Web Parts allow you to connect with the CaseMap Server and select the CaseMap SQL cases from which you want to publish data. To install the CaseMap SharePoint Web Parts, you need to deploy the spwebpartsdeploy.cab file from Microsoft SharePoint and test authentication with the REST web service.

Once installed, you will configure the CaseMap SharePoint Web Parts to point to the CaseMap Server. The CaseMap SharePoint Web Parts support both Windows and simple authentication.

- For Windows authentication, the URL should end with "CaseMapAD\CMServerAD.svc".
- For simple authentication, the URL should end with "CaseMapLA\CMServerLA.svc".

> You must have admin rights to the CaseMap Server/CaseMap Admin Console in order to install the CaseMap SharePoint Web Parts. The CaseMap Server must be installed and set up before you can install and begin using the CaseMap SharePoint Web Parts.

To deploy the CaseMap SharePoint Web Parts

1. Launch the **Microsoft SharePoint Central Administration Site**.

2. Click the **Operations** tab.

3. Under **Global Configuration**, click **Solutions Management**.

Global Configuration
- Timer job status
- Timer job definitions
- Master site directory settings
- Site directory links scan
- Alternate access mappings
- Manage farm features
- Quiesce farm
- Solution management

4. On the **Solutions Management** page, click on the **spwebpartsdeploy.cab** file.

Central Administration > Operations > Solution Management
Solution Management

This page has a list of the Solutions in the farm.

Name	Status
spwebpartsdeploy.cab	Not Deployed

5. Click the **Deploy Solution** link.

Central Administration > Operations > Solution Management > Solution Properties
**Solution Properties**

Deploy Solution | Remove Solution | Back to Solutions

Deploy Solution

Name:	spwebpartsdeploy.cab
Type:	Core Solution
Contains Web Application Resource:	Yes
Contains Global Assembly:	Yes
Contains Code Access Security Policy:	No
Deployment Server Type:	Front-end Web server
Deployment Status:	Not Deployed
Deployed To:	None
Last Operation Result:	No operation has been performed on the solution.

6. Launch the site containing the page that will contain the web parts.

7. Click the **Site Actions** button Site Actions ▾ and then click **Edit Page**.

8. Locate the web part zone to which you want to add a web part.

9. Click the **Add a Web Part** link.
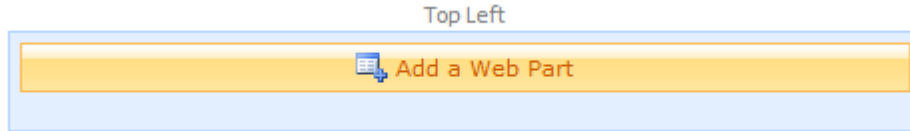
10. In the **Add a Web Parts** dialog box, scroll to the **Miscellaneous** section.
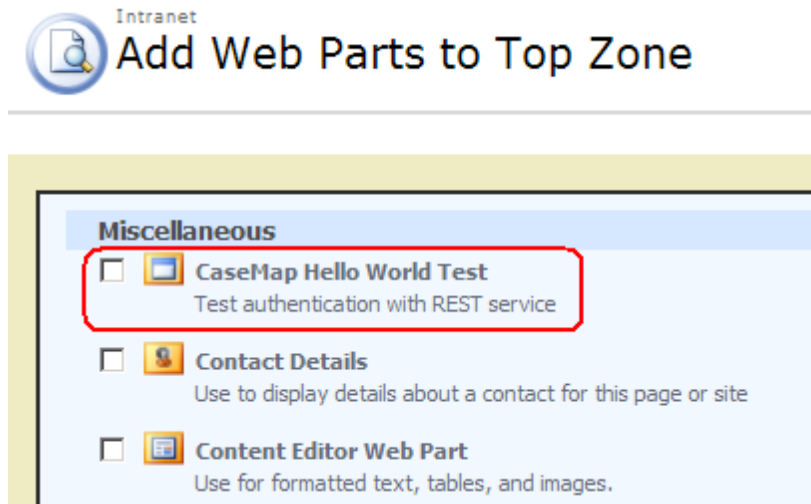
11. Select the **CaseMap Hello World Test** check box to test authentication with the REST service.

12. Click the **Add** button.

    The web part now displays in the Edit Page.

13. Click the **Publish** button to publish data to the page, if required.

    You can now set up the web part with the appropriate properties.

Related Topics

About CaseMap SharePoint Web Parts
Displaying case staff
Displaying issue outlines
Displaying spreadsheet data
Adding a CaseMap case shortcut

Managing Case Data

Displaying case staff

The CaseMap SharePoint Web Parts site allows you to display a list of active staff members in a CaseMap case without having to manually retrieve the data from the case.

In the CaseMap - Case Team Members panel, you can select the case from which you want to display a list of users. On the CaseMap SharePoint Web Parts site, the Case Team Members list displays user names in a first name, last name format. The listing is sorted by last name. Case staff that have been deleted from a case will display with "Deleted" next to their short name in the list.
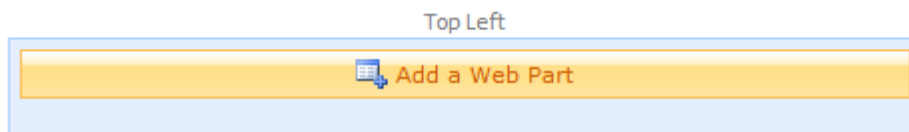
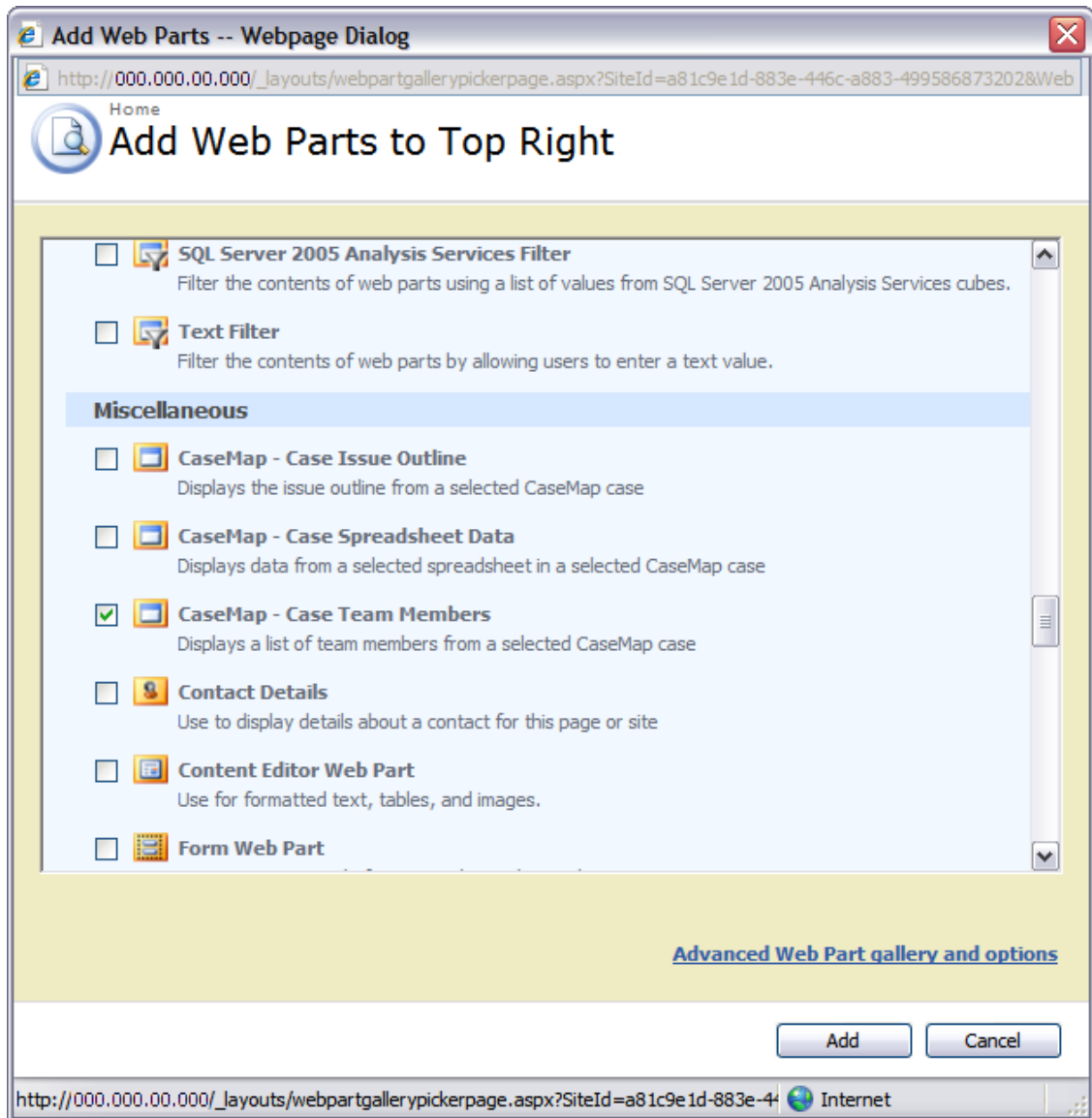| Case Team Members	▾
Pat Legal Assistant	
Chris Attorney	
Frank Investigator	
Susan Litigator	
Dave Paralegal	
Mike Legal Secretary	
Sales User1	

⊟ **To add case team members**

1. Open the **CaseMap SharePoint Web Parts** site.

2. Click on the case tab for which you want to display case staff.

3. Click on the **Site Actions** button [Site Actions ▾] in the upper right corner and then click **Edit Page**.

    The Edit Content page displays with the web part page template for you to edit.

4. Click on the **Add a Web Part** link in the web part zone where you want the case staff list to display.

    Top Left

    🔳 Add a Web Part

5. In the **Add Web Parts** dialog box, scroll down to the **All Web Parts** section until you find the **Miscellaneous** options.

6. Under the **Miscellaneous** section, select the **CaseMap - Case Team Members** check box.

7. Click the **Add** button.

    The new CaseMap - Case Team Members web part displays in the area you designated. You now need to edit the web part so that data displays in it.
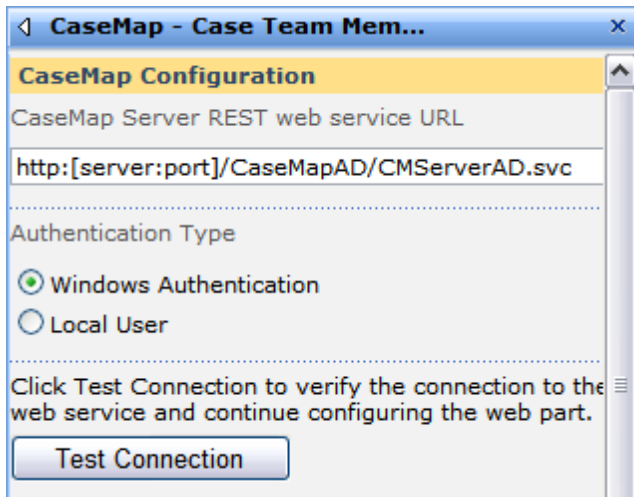
8. In the new **CaseMap - Case Team Members** web part, click the **Edit** button.
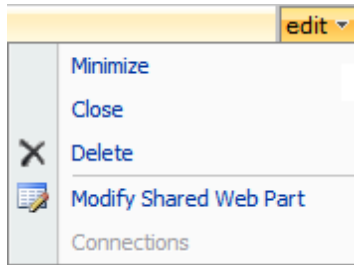
9. Click **Modify Shared Web Part**.

    The CaseMap - Case Team Members panel now displays to the right.

10. In the **CaseMap - Case Team Members** panel, type in the URL for the CaseMap Server REST web service.

    For example, for Windows authentication: http://[server:port]/CaseMapAD/ CMServerAD.svc

    For simple authentication: http://[server:port]/CaseMapLA/CMServerLA.svc
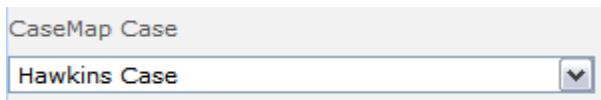
11. In the **Authentication Type** area, click the authentication type you want to use: **Windows Authentication** or **Local User**.

    If you click Local User, then enter your user name and password.

12. Click the **Test Connection** button to verify the connection to the web service and the CaseMap Server.

    When the connection is established, a CaseMap Case field displays.

13. In the **CaseMap Case** list, click on the case containing the information you want to display.

14. In the **Appearance** section, click in the **Title** field, if you want to edit the case team members title.

15. Click the **Ellipses** button [...].

     The default name is CaseMap - Case Team Members. You can change the title to reflect the current case name, such as Hawkins v. Anstar Case Team Members.

16. In the **Text Entry** dialog box, type in the case team member name you want to display in the web part.

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

18. Click the **Apply** button to view your changes without closing the pane.

     Click OK to save your changes and close the pane.

     The case team members list now displays in the CaseMap - Case Issue Outline web part.

19. On the **SharePoint** toolbar, click the **Publish** button [Publish] to publish this data on the case page so case staff can now view it.

   To customize spreadsheet data display, see Customizing data display.

Related Topics

     Customizing data display
     Deleting web parts

Displaying issue outlines

The CaseMap SharePoint Web Parts site allows you to display issue outlines so that case staff can quickly view case data in a central location without having to manually retrieve data from the case. You can only display case issues for active CaseMap SQL cases.
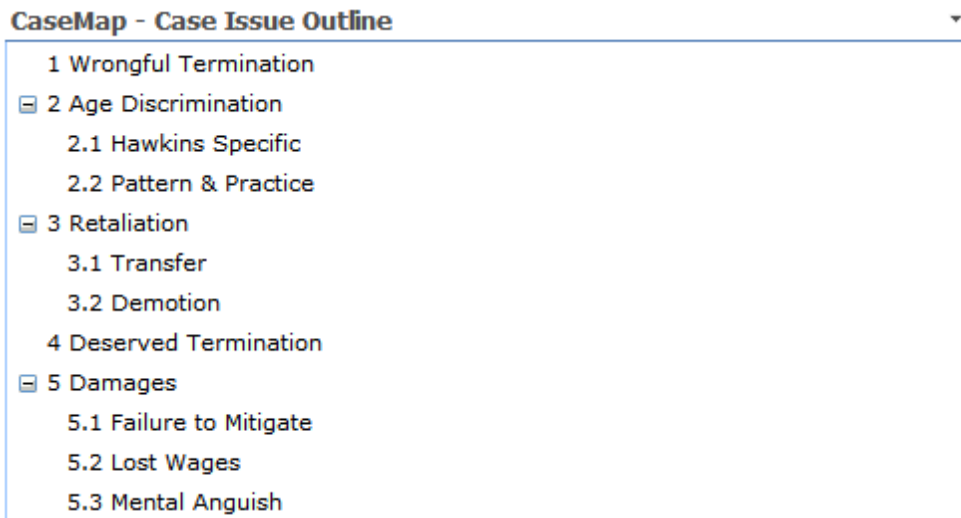
Each time you access the SharePoint site or publish to it, the issue outline displays in an expanded view to show all parent and child issues. The issue outline can be collapsed to view only a parent level list.

### *Configuring an issue outline includes:*

- Short name or full name display
- Issue outline number display

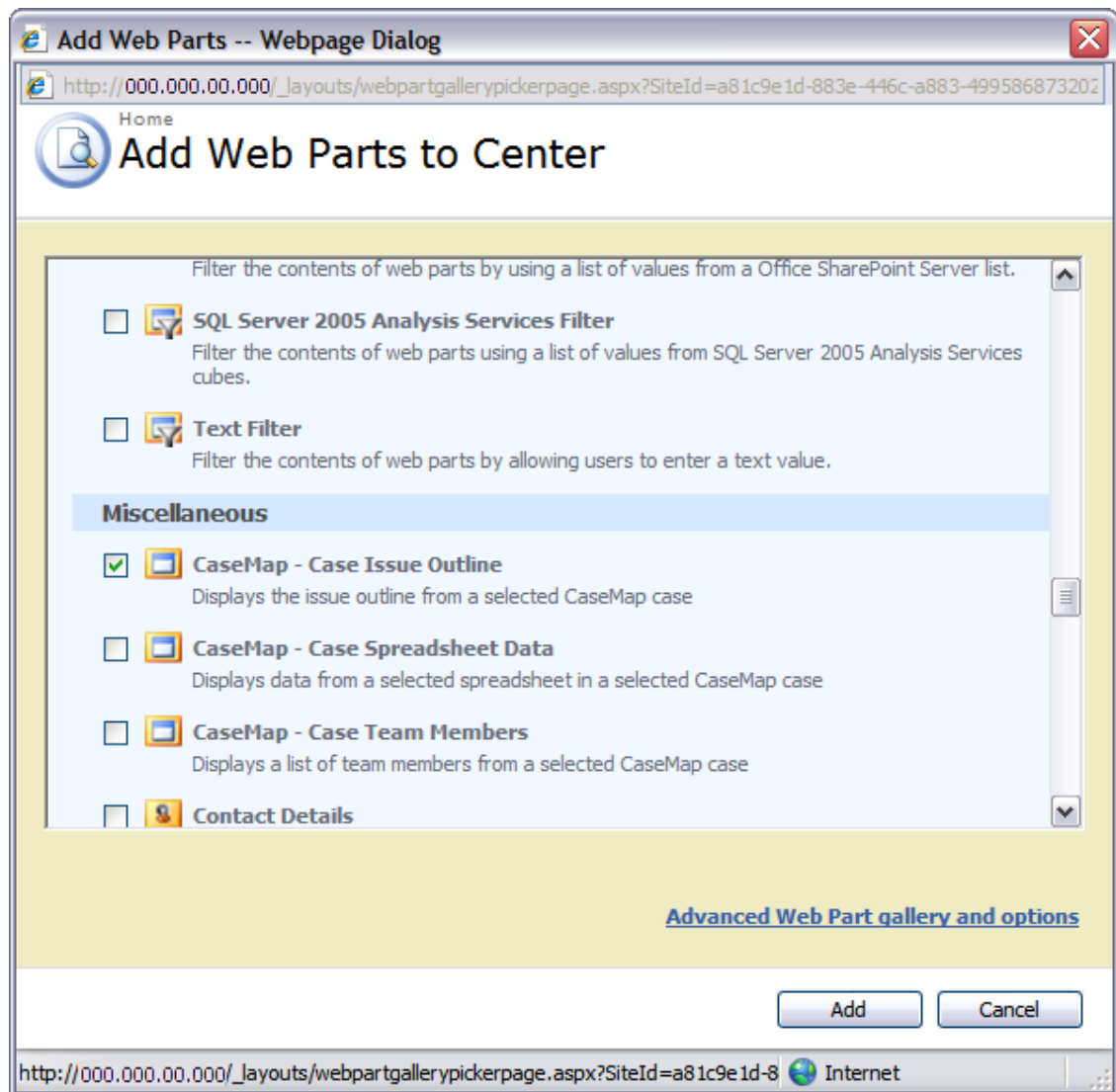#### ⊟ **To add issue outlines**

1. Open the **CaseMap SharePoint Web Parts** site.

2. Click on the case tab for which you want to add an issue outline.

3. Click on the **Site Actions** button in the upper right corner and then click **Edit Page**.

   The Edit Content page displays with the web part page template for you to edit.

4. Click on the **Add a Web Part** link in the web part zone where you want the new issue outline to display.
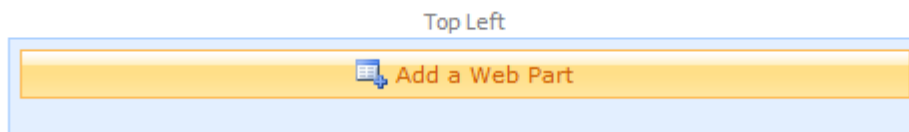

5. In the **Add Web Parts** dialog box, scroll down to the **All Web Parts** section until you find the **Miscellaneous** options.

6. Under the **Miscellaneous** section, select the **CaseMap - Case Issue Outline** check box.

7. Click the **Add** button.

   The new CaseMap - Case Issue Outline web part displays in the area you designated. You now need to edit the web part so that data displays in it.
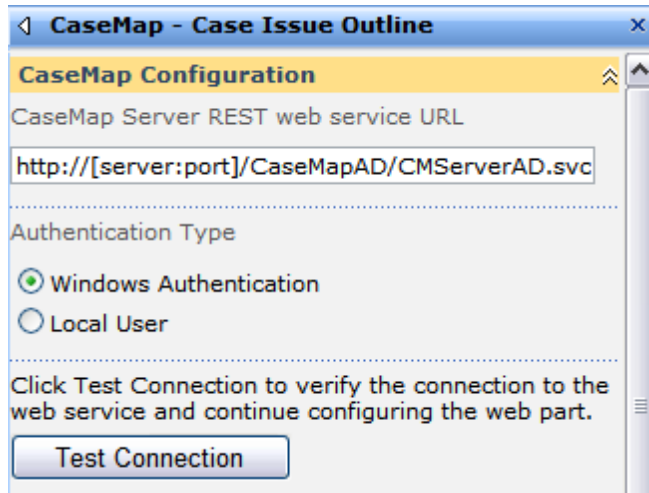
8. In the new **CaseMap - Case Issue Outline** web part, click the **Edit** button.
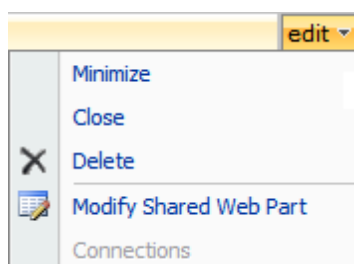
9. Click **Modify Shared Web Part**.

    The CaseMap - Case Issue Outline panel now displays to the right.

10. In the **CaseMap - Case Issue Outline** panel, type in the URL for the CaseMap Server REST web service.

11. In the **CaseMap Server REST web service URL** field, type in the URL the web part uses connect to the CaseMap Server web service.

    For example, for Windows authentication: http://[server:port]/CaseMapAD/CMServerAD.svc

    For simple authentication: http://[server:port]/CaseMapLA/CMServerLA.svc

12. In the **Authentication Type** area, click the authentication type you want to use: **Windows Authentication** or **Local User**.

    If you click Local User, then enter your user name and password.

13. Click the **Test Connection** button to verify the connection to the web service and the CaseMap Server.

    When the connection is established, a CaseMap Case field displays.

14. In the **CaseMap Case** list, click on the case containing the information you want to display.
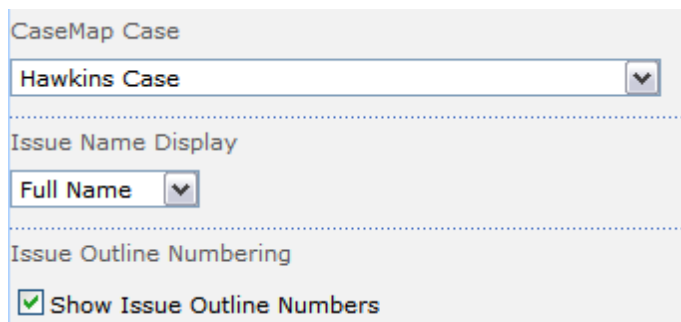
15. In the **Issue Name Display** list, click **Short Name** or **Full Name**.

    The default is Full Name.

16. Select or clear the **Show Issue Outline Numbers** check box according to the case staff's viewing preference.

    This option is enabled by default.

17. In the **Appearance** section, click in the **Title** field, if you want to edit the issue outline title.

18. Click the **Ellipses** button .

    The default name is CaseMap - Case Issue Outline. You can change the title to reflect the current case name, such as Hawkins v. Anstar Issue Outline.

19. In the **Text Entry** dialog box, type in the issue outline name you want to display in the web part.

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

21. Click the **Apply** button to view your changes without closing the pane.

22. Click **OK** to save your changes and close the pane.

    The issue outline now displays in the CaseMap - Case Issue Outline web part.

23. On the SharePoint toolbar, click the **Publish** button to publish this data on the case page so case staff can now view it.

    To customize spreadsheet data display, see Customizing data display.

Customizing data display
Deleting web parts

Displaying spreadsheet data

The CaseMap SharePoint Web Parts site allows you to display spreadsheet data so that case staff can quickly view case data in a central location without having to manually retrieve data from the case. You can also publish custom spreadsheets too.

You can easily edit the spreadsheet data for how you want it to display. Once you have modified the display settings, you can then publish the data to the CaseMap SharePoint Web Parts page for users to view.

Configuring a spreadsheet includes:

- Adjusting the page size
- Adjusting page numbering display (Top, Bottom, or Top and Bottom)
- Selecting a paging style display (Next Page/Prev Page buttons or number links)

  You can specify spreadsheet page size settings of 5, 10, 25, 50, or 100. The default is 10.

⊟ To view spreadsheet field data display considerations

The following list provides spreadsheet field data display considerations when data is published to the CaseMap SharePoint Web Parts site for users to view.

- A maximum of 100 documents can be displayed.
- Views determine the fields and sort order, and are associated with each user. Any user's spreadsheet view can be selected to display spreadsheets data.
- Dates display in YYYY-MM-DD format and include time and date ranges if applicable.
- Time stamped fields display in the proper date format (HH:MM:SS).
- Time displays in the default time zone, even if a time zone was specified during data entry.
- Currency fields display with dollar signs and the proper number of digits beyond the decimal point (2 or 4). If the last two digits are zeros, they will not display.
- Fields that contain links to documents or files are not included in the spreadsheet data display on the site page. These fields include Linked Summary fields, Related Files fields, and the Linked Element field on the Questions spreadsheet.
- Object and issue names can be displayed in either the Full Name or Short Name format.
- Persons names display in the First Name/Last Name format just like in CaseMap.
- The Linked Issues field displays the issue short name just like in CaseMap.
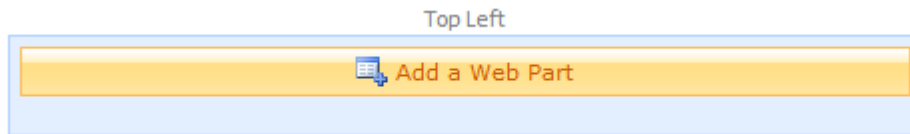
⊟ To add case spreadsheets

1. Open the **CaseMap SharePoint Web Parts** site.

2. Click on the case tab for which you want to add a spreadsheet.

3. Click on the **Site Actions** button in the upper right corner and then click **Edit Page**.

    The Edit Content page displays with the web part page template for you to edit.

4. Click on the **Add a Web Part** link in the web part zone where you want the new spreadsheet data to display.

    Top Left

5. In the **Add Web Parts** dialog box, scroll down to the **All Web Parts** section until you find the **Miscellaneous** settings.
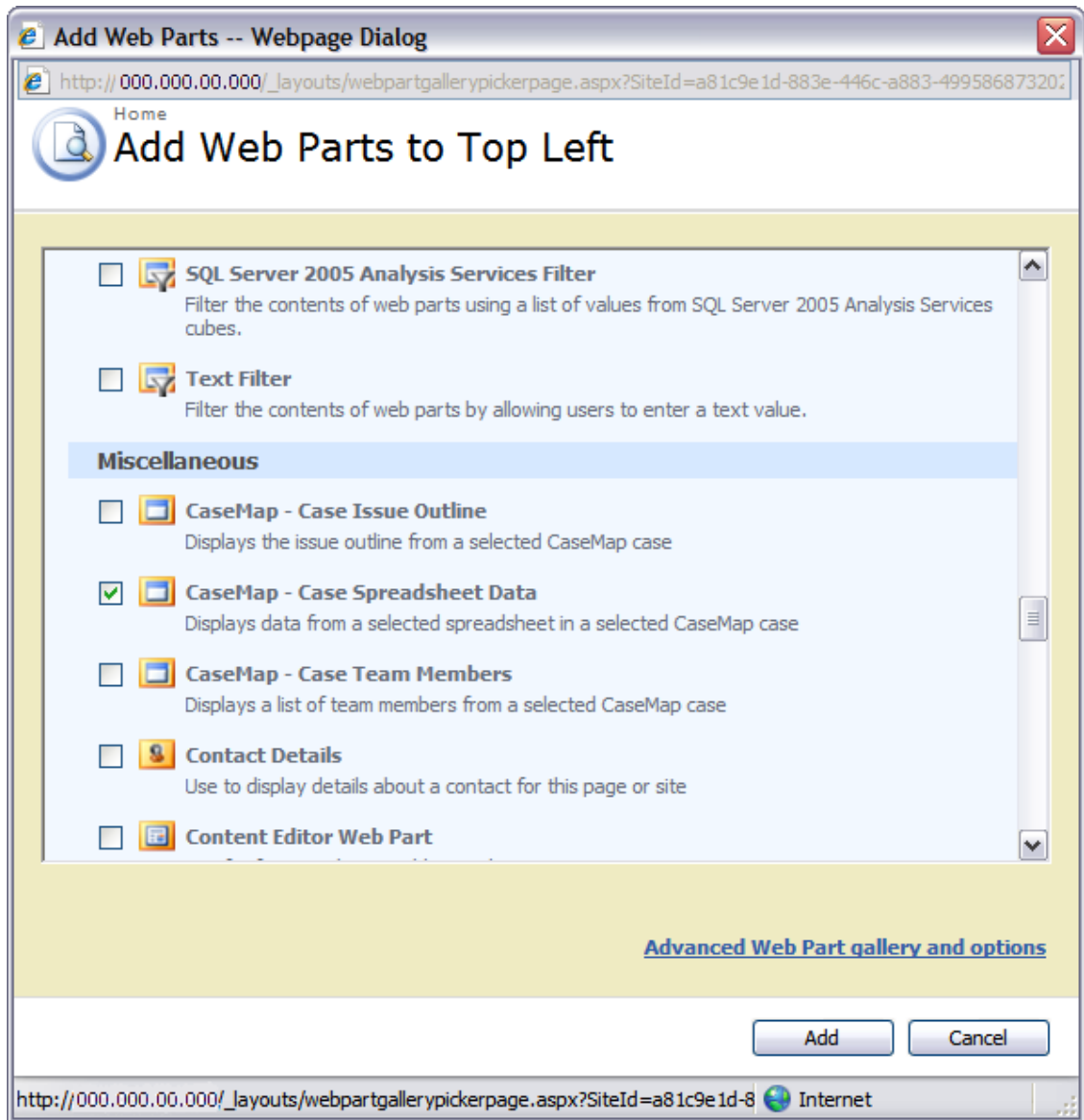
6. Under the **Miscellaneous** section, select the **CaseMap - Case Spreadsheet Data** check box.

7. Click the **Add** button.

    The new CaseMap - Case Spreadsheet Data web part displays in the area you designated. You now need to edit the web part so that data displays in it.
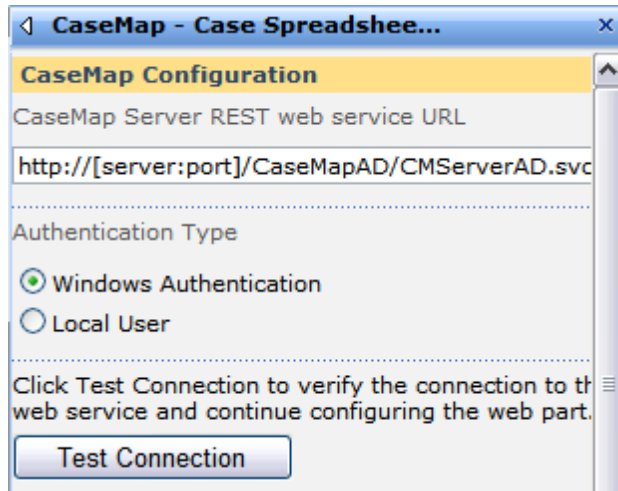
8. In the new **CaseMap - Case Spreadsheet Data** web part, click the **Edit** button.
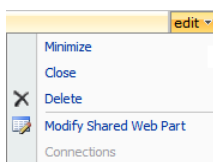
9. Click **Modify Shared Web Part**.

    The CaseMap - Case Spreadsheet Data panel now displays to the right.

10. In the **Case Spreadsheet Data** panel, type in the URL for the CaseMap Server REST web service.

    For example, for Windows authentication: http://[server:port]/CaseMapAD/ CMServerAD.svc

    For simple authentication: http://[server:port]/CaseMapLA/CMServerLA.svc

11. In the **Authentication Type** area, click the authentication type you want to use: **Windows Authentication** or **Local User**.

    If you click Local User, then enter your user name and password.

12. Click the **Test Connection** button to verify the connection to the web service and the CaseMap Server.

    When the connection is established, a CaseMap Case field displays.

13. In the **CaseMap Case** list, click on the case for which you want to display spreadsheet data.

14. In the **Case Spreadsheet** list, click on the spreadsheet for which you want to display data.

15. In the **Spreadsheet View** list, click on the user to view the user's spreadsheet views.

    Views are associated with each user. Any user's spreadsheet view can be selected to display.

16. In the **Select a view to determine the fields and sort order** list, click on the spreadsheet view you want to display for that user.

    The Spreadsheet Paging Options panel now displays.

17. In the **Page Size** list, click on the number of pages you want to display for navigating spreadsheet data.

18. In the **Position** list, click on the display option for navigation controls: **Bottom**, **Top** or **Top and Bottom**.

19. In the **Style** list, click on the style option for navigation controls: **Next/Previous**, **Next/Previous/First/Last**, **Numeric**, or **Numeric/First/Last**.

20. In the **Object and Issue Name Display** list, click on **Short Name** or **Full Name**.

    This field defaults to Full Name.

21. In the **Appearance** section, click in the **Title** field, if you want to edit the spreadsheet title.

22. Click the **Ellipses** button .

The default name is CaseMap - Case Spreadsheet Data. You can change the title to reflect the spreadsheet data your are displaying, such as Facts spreadsheet or Documents spreadsheet.

22. In the **Text Entry** dialog box, type in the spreadsheet name you want to display in the web part.

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

23. Click the **Apply** button to view your changes without closing the pane.

24. Click **OK** to save your changes and close the pane.

The case spreadsheet data you specified now displays in the CaseMap - Case Spreadsheet Data web part.

25. Click the **Publish** button [Publish] to publish this data on the case page so case staff can view it.

To customize spreadsheet data display, see Customizing data display.

[Related Topics]

Customizing data display
Deleting web parts

Displaying a case hyperlink

The CaseMap SharePoint Web Parts site allows you to display a case hyperlink so case staff can open a CaseMap SQL case in CaseMap directly from the site page. The case hyperlink only works internally inside your organization's Intranet; it will not work on a public Internet site.

CaseMap - Case Link
Hawkins v. Anstar

***In order to open a case file using the CaseMap - Case Link:***

- CaseMap SharePoint Web Part site users must be added as a user in the CaseMap SQL case (CaseMap Admin Console) in order to open it.
- CaseMap must be installed on the desktop that is also accessing the CaseMap SharePoint Web Parts page.
- In the File Download dialog box, click the Open button (not Save).

📝 To launch a CaseMap case effectively from the hyperlink on the site page, you must be

using Microsoft Internet Explorer. Opening a case from the site page does not work well with Mozilla Firefox and other Internet browsers.

To add a CaseMap SQL case link shortcut

1. Open the **CaseMap SharePoint Web Parts** site.

2. Click on the case tab for which you want to display the case link.

3. Click on the **Site Actions** button **Site Actions ▾** in the upper right corner and then click **Edit** Page.

4. The **Edit Content** page displays with the web part page template for you to edit.

5. Click on the **Add a Web Part** link in the web part zone where you want the case link to display.
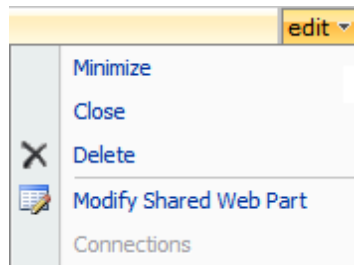
Top Left

🖳 Add a Web Part
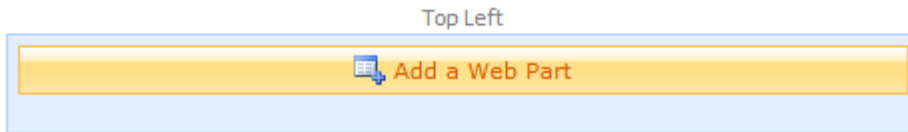
6. In the **Add Web Parts** dialog box, scroll down to the **All Web Parts** section until you find the **Miscellaneous** settings.
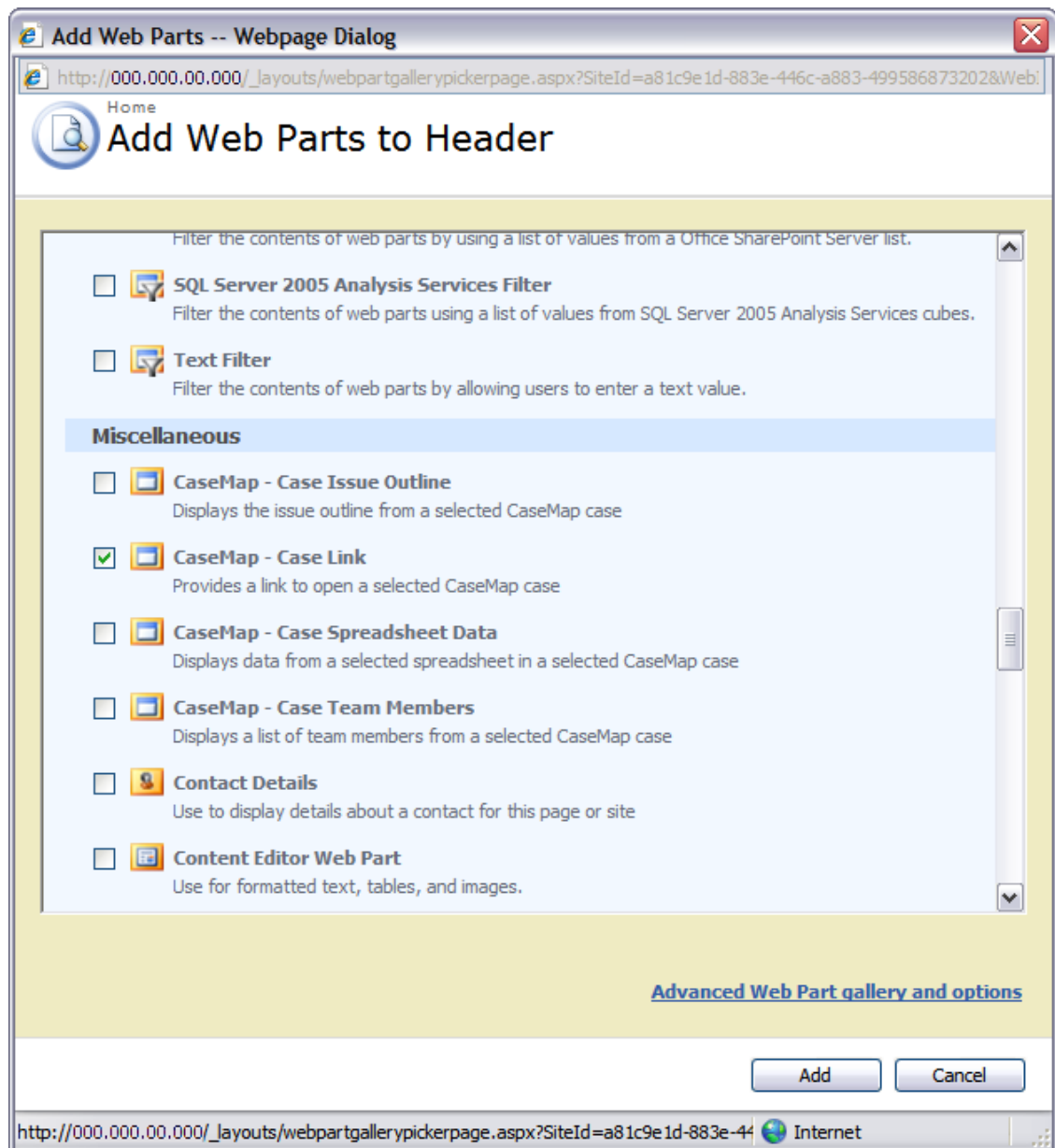
7. Click the **Add** button.

    The new CaseMap - Case Link web part displays in the area you designated. You now need to edit the web part so that the hyperlink displays in it.
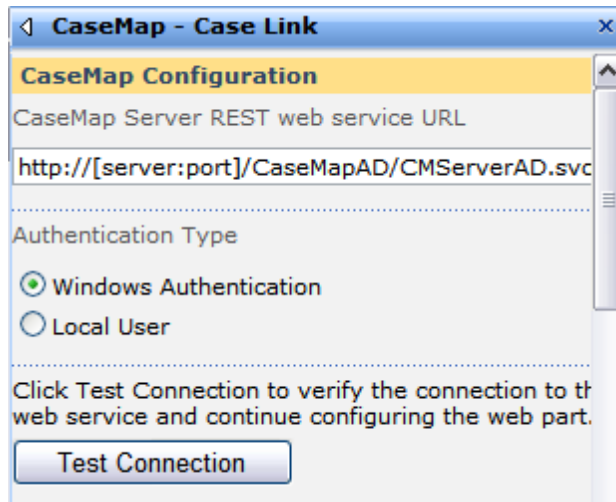
8. In the new **CaseMap - Case Link** web part, click the **Edit** button.

9. Click **Modify Shared Web Part**.

    The CaseMap - Case Link panel now displays to the right.

10. In the **CaseMap - Case Link** panel, type in the URL for the CaseMap Server REST web service.

    For example, for Windows authentication: http://[server:port]/CaseMapAD/CMServerAD.svc

    For simple authentication: http://[server:port]/CaseMapLA/CMServerLA.svc

    If you click Local User, then enter your user name and password.

11. Click the **Test Connection** button to verify the connection to the web service and the CaseMap Server.

    When the connection is established, a CaseMap Case field displays.

12. In the **CaseMap Case** list, click on the case for which you want to display a hyperlink.

13. In the **Link Text** field, the case name automatically displays.

    You can edit the case name for how it will display as a hyperlink.

14. In the **CaseMap Application Path** field, type in the full path to the CaseMap.exe file.

    The default path is C:\Program Files\Casesoft\CaseMap9\CaseMap.exe.

    You can edit this path. The text should default to the case name.

15. In the **Appearance** section, click in the **Title** field, if you want to edit the case link title that displays at the top of the web part zone.

16. Click the **Ellipses** button .

    The default name is CaseMap - Case Link.

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

18. Click the **Apply** button to view your changes without closing the pane.

19. Click **OK** to save your changes and close the pane.

    The case link now displays in the CaseMap - Case Link web part.

20. On the **SharePoint** toolbar, click the **Publish** button to publish the link on the case page so case staff can now view it.

    To customize spreadsheet data display, see Customizing data display.

To open a SQL case from the site page

When opening a SQL case from the hyperlink on the site page, it is best to only click the Open button (and not Save). Please ensure that case staff opening cases from the CaseMap SharePoint Web Parts site understand these procedures.

1. Open the **CaseMap SharePoint Web Parts** site.

2. Click on the case tab for which you want to display the case link.

3. Click on the case link.

4. In the **File Download** dialog box, click **Open**.

5. In the **Connect to CaseMap Server** dialog box, type in your log on credentials, then click **Connect**.

    The SQL case file now displays in CaseMap.

Related Topics

[About CaseMap SharePoint Web Parts](#)

Customizing data display

You can customize how CaseMap case data displays for each web part on the CaseMap SharePoint Web Parts site. Each spreadsheet, issue outline, or team member case pane has three panels for customizing the display:
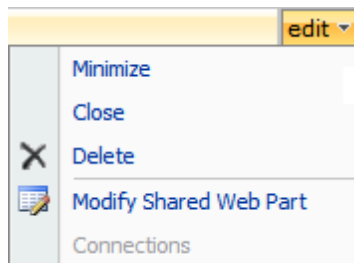
- Appearance
- Layout
- Advanced

The steps covered in this topic refer to editing Appearance settings. To learn how to use the Layout and Advanced settings, please reference the Microsoft SharePoint documentation.

⊟ **To edit web part display**

1. Open the **CaseMap SharePoint Web Parts** site.

2. Click on the case tab for which you want to edit a spreadsheet.

3. Click on the **Site Actions** button Site Actions ▾ in the upper right corner and then click **Edit Page**.

    The Edit Content page displays the web part page template for you to edit.

4. Locate the web part for which you want to edit data display.

5. Click on the **Edit** button and then click **Modify Shared Web Part**.

The CaseMap Case panel displays for the web part you selected: Spreadsheet, Issue Outline, or Team Members.

6. In the **CaseMap Case** panel, scroll until you see the **Appearance** section.

7. In the **Title** field, type in the name of the CaseMap spreadsheet, issue outline, and team members list that you want to display for the web part.

8. In the **Height** area, select whether the web part should have a fixed height.

    *   If you click Yes, then type in the display height you want and click the height measurement you want to use.

        This field defaults to Pixels.

    *   If you click No, then the data displayed is automatically adjusted to the height of the zone.

9. In the **Width** area, select whether the web part should have a fixed width.

    *   If you click Yes, then type in the display width you want and click the width measurement you want to use.

    *   If you click No, then the data displayed is automatically adjusted to the width of the zone.

10. In the **Chrome State** area, click **Minimized** or **Normal**.

    *   Normal displays the entire web part.

    *   Minimized displays the title bar for the web part.

11. In the **Chrome Type** area, select the title bar and border setting you want to use: **Default**, **None**, **Title and Border**, **Title Only**, and **Border Only**.

12. Click the **Apply** button to view your changes without closing the pane.

13. Click **OK** to save your changes and close the pane.

Related Topics

Displaying case staff

Displaying issue outlines

Displaying spreadsheet data

Modifying a web part

You can easily edit a web part once it has been published to a CaseMap SharePoint Web Parts page for viewing. All you need to do is click on the web part zone you want to edit, make the necessary changes, and then publish the updates so users can view the data the way you want it displayed.

> If you want to display case data in the same location as other data, you can add it to the same web part zone. For example, if you want to display case data in the Top Right web part zone, you can click the Add a Web Part link to add case data to the same zone. The new case data will display in the same location, above the current case data. Otherwise, click on the Add a Web Part link for the web part zone you want (Header, Center, Right, etc.).
>
> You can rearrange data display within a web part zone by clicking on the corner of the active data (outlined in an orange dotted line) and dragging it above or below other data.

To modify a web part

1. Open the **CaseMap SharePoint Web Parts** site.

2. Click on the case tab for which you want to display case staff.

3. Click on the **Site Actions** button **Site Actions ▾** in the upper right corner and then click **Edit Page**.

   The Edit Content page displays with the web part page template for you to edit.

4. In the web part zone you want to edit, click the **Edit** button.
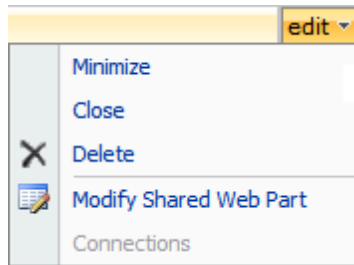
5. Click **Modify Shared Web Part**.

   The applicable CaseMap panel now displays to the right.

6. In the **CaseMap** panel, make the modifications you need, then click **Apply**.

   - Click the Apply button to view your changes without closing the pane.
   - Click OK to save your changes and close the pane.

   To customize spreadsheet data display, see Customizing data display.

   The updated case spreadsheet data you specified now displays in the CaseMap web part.

7. Click the **Publish** button **◯ Publish** to publish this data on the case page so case staff can view it.
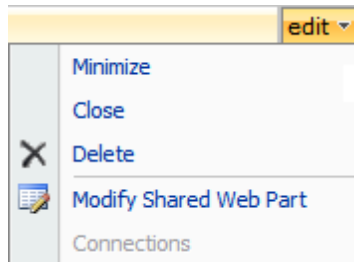
Related Topics

Customizing data display
Deleting web parts

Deleting web parts

Deleting a web part permanently removes it and the data associated with it from displaying on the case page. If you want to display the same web part and data again, you will need to configure the data again in the web part zone and publish it to the site page.

⊟ To delete a web part

1.   Open the **CaseMap SharePoint Web Parts** site.

2.   Click on the case tab for which you want to delete a web part.

3.   Click on the **Site Actions** button **Site Actions ▾** in the upper right corner and then click **Edit Page**.

4.   On the **Edit Content** page, locate the web part you want to delete.

5.   In the web part, click the **Edit** button and then click **Delete**.

6.   In the message box, click **OK** to delete the web part.

7.   On the **SharePoint** toolbar, click the **Publish** button **🗐 Publish** to update the view for this case page.

     The selected web part no longer displays.

Related Topics

Customizing data display
Modifying a web part

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