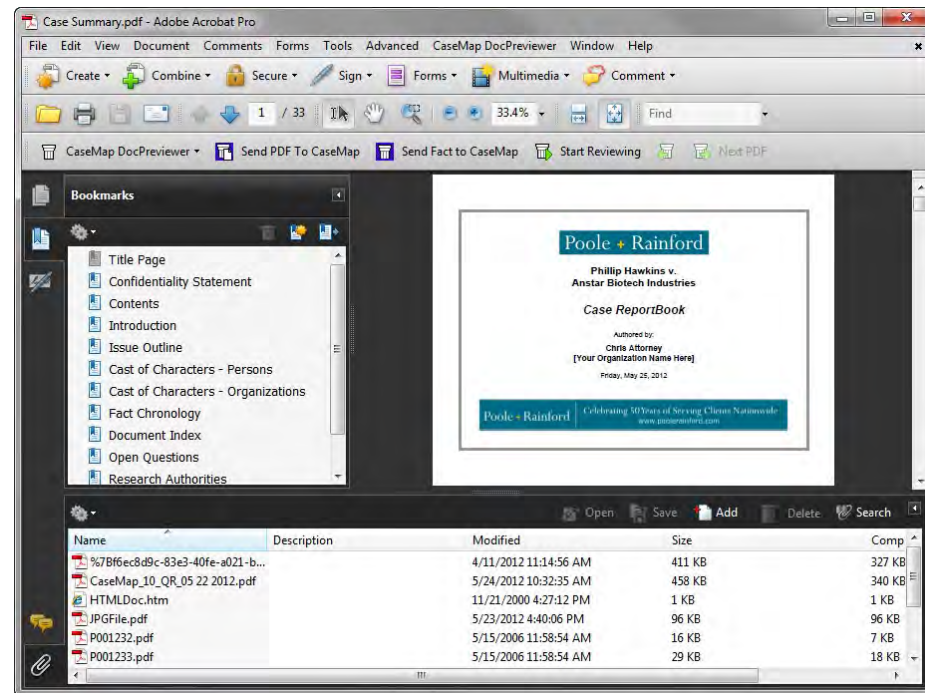


## Reports and Reportbooks

### Creating and Printing Reports

Case spreadsheets are the raw material that make 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. With CaseMap reports, What-You-See-is-What-You-Get, so what is displayed in your spreadsheet view is the same as what you see in your report. Make sure you have filtered your spreadsheet content and sorted records to create the view you want before printing your reports.

CaseMap also offers four pre-built reports that you can easily produce using a wizard to guide you through the steps. Pre-built reports include the following options: Privilege Log, Summary Judgment, By Issue Report, By Object Report.



### Printing ReportBooks

ReportBooks are living documents that can be used throughout the life of the trial that are essential for ensuring that clients and case staff stay abreast of case developments and can readily collaborate in the case analysis process.

A ReportBook is a compilation of CaseMap reports packaged with optional elements such as a cover page, table of contents, confidentiality statement, introduction, and report-specific title pages. The layout is similar to the standard report generated when you print one of CaseMap's spreadsheet views. CaseMap offers eight pre-built ReportBooks for you to choose from, including a complete Case Summary (as shown above) and an overview of What's New in the Last 14 days.

ReportBooks are printed to a PDF file. You can choose whether to embed linked files in your ReportBook so that others can click on a document or file and view it in its native application.

#### Litigators use ReportBooks in a variety of ways:

- Produce a ReportBook shortly after client intake to show clients that you have captured their concerns.
- Compile a ReportBook to present your case to investigators, arbitrators, clients, and other key decision makers.
- Save your ReportBooks in PDF and link them to correspondence.

#### To print to PDF:

- 1 On the **Reports** menu, click **Print** or **PDF Current View**. You can also click the **Print** button on the CaseMap toolbar.
- 2 On the submenu, click **Print to PDF** or **Print to PDF Email**. The Print to PDF Email option includes the PDF report in an Outlook email that you can send to case staff or clients.

#### To print to Word, Excel, TimeMap, NoteMap, HTML, or Corel WordPerfect:

- 1 On the **Reports** menu, click **Send Current View To**.
- 2 On the submenu, click on the print option you want.

Some options allow you to select either a Grid or Record View. Try printing both to see which view you prefer.

#### To print a CaseMap pre-built report:

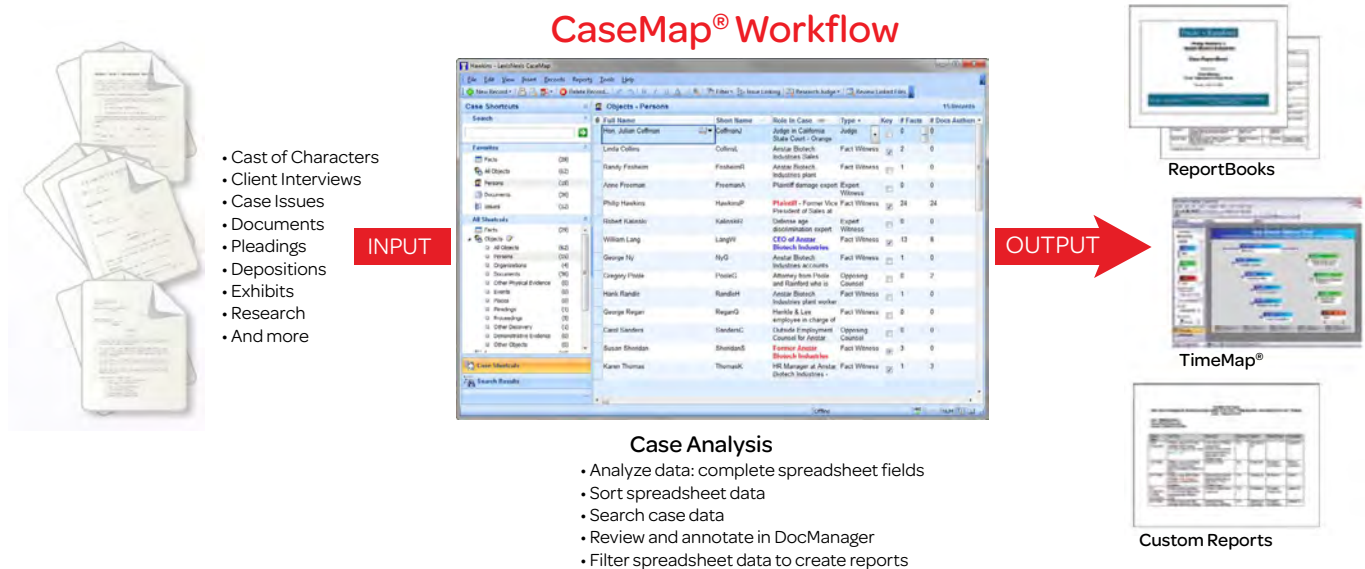
- 1 On the **Reports** menu, click the pre-built report you want to print: **Privilege Log**, **Summary Judgment**, **By Issue Report**, **By Object Report**.
- 2 When the report wizard launches, follow the steps in each box.
- 3 When you complete the wizard and the report displays, you can save it as a Word file to the network folder where you store reports.

#### To print and view a ReportBook:

- 1 On the **Reports** menu, click **ReportBooks**.
- 2 On the submenu, click the ReportBook you want to print.
- 3 On the print option submenu, click **Print to PDF** or **Print to PDF Email**.
- 4 In the **Save As PDF** dialog box, navigate to the network folder where you save reports, and then click **Save**.
- 5 In the message box, click **Yes** or **No** to embed linked files. If you click **Yes**, select which files you want to include in the ReportBook, and then click **OK**.
- 6 In the message box, click **Yes** to view the ReportBook.
- 7 In the **Bookmarks** pane, click on a bookmark link to view that section of the report.
- 8 In the ReportBook PDF file, click the **paperclip** icon in the lower left corner to display embedded linked files.
- 9 Double-click on a linked file to view it in its native application.

## CaseMap® Quick Reference

## Litigation Services



## Creating and Setting Up a Case

### 1. Creating a Case

Before working in CaseMap, you first need to create a case file to store information regarding the matter.

#### To create a new case:

1. On the **File** menu, click **New**.
2. Follow steps in the wizard to set up case information.
  - The time zone should reflect the primary location where your case and most facts and events occur.
  - Add case users later once the case is created and any custom fields or views are added.
  - Save the case to a network folder so others can access it.
3. Click **Finish** to create the new case file and launch the new **Case Jumpstart Wizard**.

### 2. Creating a Cast of Characters

CaseMap's objects spreadsheets are used to organize your list of "nouns" and Cast of Characters regarding the case, including persons, places, events, documents, evidence, proceedings, and pleadings.

#### Short Names:

When names are entered, CaseMap automatically creates short names - unique names for each object entered in a case. Short names are what make linking case data possible. When a short name is identified, CaseMap automatically links the object to case information: facts, issues, questions, and research. This feature is what allows you to search and view data in various ways so you can quickly locate essential information and create reports that shape and support your case strategy. For more information and tips on short names, see the **CaseMap Answer Center**.

#### To enter a basic Cast of Characters:

1. In the **Case Jumpstart Wizard**, click on the appropriate link to type in your character name. The wizard provides pages for Litigants, Judges, Opposing Counsel, Witnesses, Other People, and Other Organizations.
2. When you're done, click **Finish**. The **All Objects** spreadsheet displays so you can review your Cast of Characters. Notice how each object has a short name created for it.
3. In the **Case Shortcuts** pane, click the **All Shortcuts** bar to view the Cast of Characters organized by sub-object spreadsheets.

### 3. Entering Issues

When you first create your case, start outlining your issues in the Issues spreadsheet so you can quickly develop a hierarchy of claims, counter-claims, 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.

#### To enter issues:

1. In the **Case Shortcuts** pane under Favorites, click on **Issues**.
2. In the **Full Name** field, type in an issue.  
CaseMap automatically creates a short name for the issue to link issues to fact records and other case data.
3. Click the **New Record** button and then click **Issues** or press the **Insert** key to enter in a new issue.
4. To create a sub-level issue, click the arrow pointing to the right. CaseMap automatically saves each record as you move to a new field or record.



## Getting Data into CaseMap

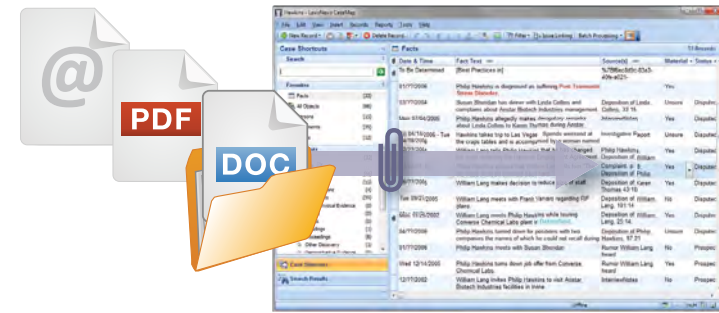
CaseMap offers several ways to get case data into your case file.

### There are three main ways to get data into CaseMap:

- Manually entering data into spreadsheets
- Bulk importing data using the Import Linked Files Wizard
- Sending facts and data from other programs (like Microsoft® Word, Microsoft® Outlook, Concordance®, TextMap®, and Adobe® Acrobat).

### A. Manually Entering Data

As you gather new case information, you can manually create a new record on any spreadsheet to update the case. To create new record, press the Insert key or click the New Record button on the CaseMap toolbar. Records are saved automatically as you navigate from record to record. To re-sort the spreadsheet, click Refresh Table on the Records menu.



### B. Importing Documents and Files into a Case

The Import Linked Files Wizard guides you through importing one or more documents/files into your case. The wizard will create a new record for each document you select to import. After the import, CaseMap indexes all new file content. You can begin searching the updated case data as soon as the index process completes.

#### To bulk import documents:

- 1 On the **File** menu, click **Import** and then click **Linked Files from a Folder**.
- 2 In the **Import Linked Files Wizard**, click **Next**.
- 3 In the **Select Files to Import** dialog box, click one of the import options: **Add Files** or **Add Folder**.
- 4 In the **Select Files to Import** dialog box, navigate to the folder where the files are saved, and select the file or folder to import, and then click **Open**. The files now display in the Selected files box.
- 5 After reviewing the files, click **Next**.
- 6 In the **Spreadsheet** drop-down list, click the spreadsheet for which you want to import the files, and then click **Next**.
- 7 In the **Ready to Import** dialog box, review the files and spreadsheet you selected for the import.
- 8 Click **Next** to initiate the import process.
- 9 In the **Completing the Import Linked Files Wizard** dialog box, review the number of files imported, then click **Finish**. The new records display in the selected spreadsheet.
- 10 In the **Completing the Import Linked Files Wizard** dialog box, review the number of files imported, then click **Finish**. The new records display in the selected spreadsheet.
- 11 In the **Case Shortcuts** pane, click on the spreadsheet. A paperclip icon displays next to each record to indicate that a linked file is attached.
- 12 Click on the **paperclip** icon to view the file in its native application or in the DocManager viewer.

### C. Using the Send to CaseMap Tool

You can easily send fact text or documents directly to your case from other programs. While building the chronology with facts linked to documents, you can enter fact details, link to case elements by using short names and issues, and mark the status of the new fact.

Steps for sending facts or documents are nearly identical for each product. For complete step-by-step instructions for all supported products, see the **CaseMap Answer Center**.

#### To send a document from Adobe Acrobat or Reader:

- 1 With your PDF file open, right-click in the document and click **Send PDF to CaseMap**.
- 2 In the **Send to CaseMap** dialog box, select **Document** in the Object Type list.



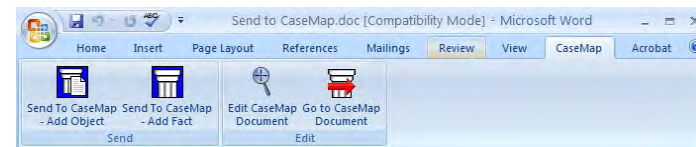
- 3 Type in the document name or edit the Full Name field, then click **Save**.
- 4 In the **Send to CaseMap** dialog box, click **Yes** to view the new document record in CaseMap.

**Note:** To send a fact, click the Send Fact to CaseMap in the PDF file.

#### To send facts and files from Word:

Send to CaseMap features display on a CaseMap ribbon within Word. The add-in is optional during CaseMap v10 installation.

- 1 Open the CaseMap case that you want to import data into from Word.
- 2 In the Word document, highlight the information you want to send, then click the **Send to CaseMap - Add Fact** button.



- 3 When the Send to CaseMap utility launches, select the spreadsheet you want and type in the document name, then click **OK**.
- 4 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.

**Note:** The text selected displays in the Text Selection field and is enclosed in brackets. Do not delete the brackets. Removing them prevents CaseMap's recognition of short names and designate actual document text for the import.

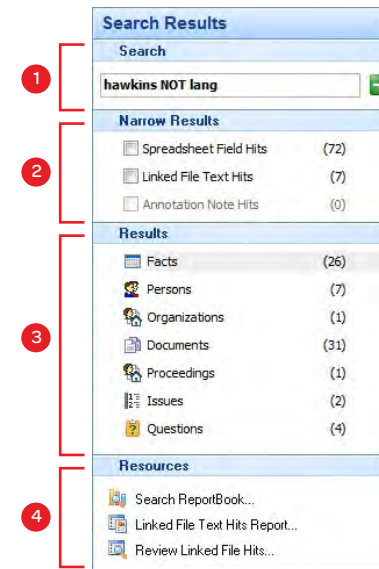
- 5 In the **Favorites Fields** area, enter in additional fact record details like the date & time.
- 6 Click the **Issue Linker** bar to link the record to an issue.
- 7 Click **OK** to initiate the import process.
- 8 In the message prompt, click **Yes** to view the new fact record in the Facts spreadsheet.
- 9 Click in the **Fact Text** field to view the highlighted text you sent from the Word document.
- 10 Click on the **paperclip** icon for the fact record to view the linked file path and open the file in Word.
- 11 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.
- 12 Click on the **Documents** spreadsheet to view the record created for the linked Word file. If you only want to send the Word document, click the **Send to CaseMap - Add Object** button.

## Case Analysis

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, sorting, tagging, and filtering case information from various angles may offer insights not otherwise noticed.

### A. Analyzing Spreadsheet Records

After getting data into Casemap, you'll want to analyze spreadsheet records and complete information in each field. For example, on the Facts spreadsheet, you'll want to mark which facts are relevant (Material field) and whether the facts are disputed (Status field).

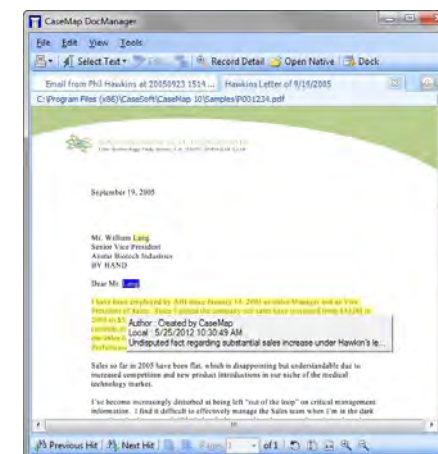


#### The Search Results navigation pane has four parts:

- 1 **Search field** — Allows you to type in full-text search terms.
- 2 **Narrow Results panel** — Allows you to view search hits found in spreadsheet fields, linked file text, or annotation note text. The number of search hits found displays to the right of the results.
- 3 **Results panel** — Displays all spreadsheets that contain records or linked files with search hits. The number of search hits found displays to the right of the spreadsheet name.
- 4 **Resources panel** — Provides access to three search results reports.

### E. Viewing Documents and Images in DocManager

Content analysis can be done in CaseMap's DocManager near native image viewer. DocManager allows you to review and annotate documents and images without having to open the source file in its native application. You can add notes to annotations, edit annotations and notes, and also search annotation notes. Annotation colors can be changed by each user, but only one color is used for printing. When a search is run, search hits are highlighted in DocManager allowing you to review content and navigate between search hits. Current search hits are highlighted in blue. All other search hits are highlighted in yellow. You can then view and print the Linked File Text Hits and Review Linked File Hits reports. You can batch print linked document files with or without Bates stamps and choose whether to include annotations and notes in the printed output.



#### To view a document or image file:

In a spreadsheet, click on the paperclip icon  for the linked file you want to view. To view multiple documents at one time, click the Pin icon in the upper right corner to this position. 

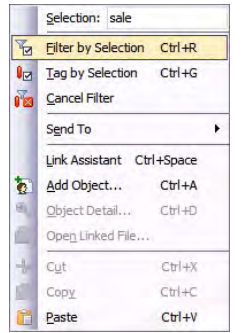
#### To navigate search hits:

Click the Previous Hit and Next Hit buttons in the lower left corner of DocManager. You can also click on or type a number in the Page list to jump to that page.

#### To annotate documents or images:

1. Open a linked file in DocManager and click the **Annotation mode** button.
2. Click **Annotate Text**. You can also click the **Tools** menu and then click the first menu item on the shortcut menu, and click **Annotate Text**.
3. Drag your mouse pointer over the text you want to annotate to open the **New Annotation** dialog box. The text you selected now displays in the Document Text box.
4. In the **Note** tab, type in information you want and then click **OK**.

**Tip:** If the selected text is worthy of a new fact record, click the Create New fact button to add it to the Facts spreadsheet.



### C. Filtering Spreadsheet Records

Filtering allows you to cull data for reports or save filters to rerun later when additional 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. You can filter by key words, field status setting, or create multi-level filters (key word + field status). You can also run pre-built filters from the Records menu, by clicking Filters and selecting an option from the submenu. The filter menu options change depending on the spreadsheet you are viewing.

### D. Searching Case Data

CaseMap allows you to quickly search case data because of the comprehensive index created 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. To run a previous search or search by selected spreadsheets, click the Records menu and then click Full Text Search.

After a search is run, search results display in two areas in CaseMap: the Search Results pane and the spreadsheets pane. Print the Search ReportBook to create a report of each spreadsheet record and all linked files located based on your search query.