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Abrati 28 n 28 g 28 28 rp..... 481
Alp 483
Ch 28 an 28 g 28 i 28 n 28 g 28...28 rp..... 487
Ad 28 d 28 i 28 n 28 g 28 /d 28 i 28 ti 28 n 28 g 28...28 rp 28 p 28 ags..... 489
Crati 28 n 28 g 28 28 a 28 fi 28 lrd 28...28 rp..... 493
Emi 28 l 28 rpsti 28 o 28 n 28 s..... 495
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About CaseMap

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What's New in CaseMap

#

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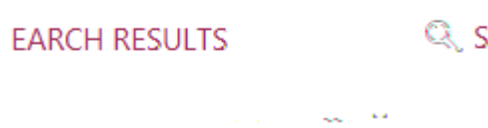
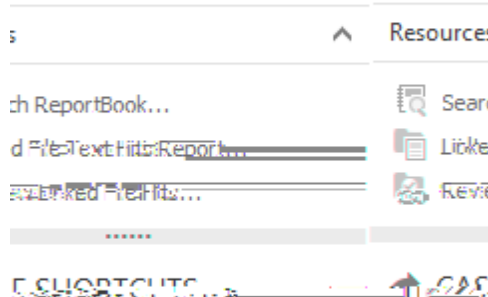
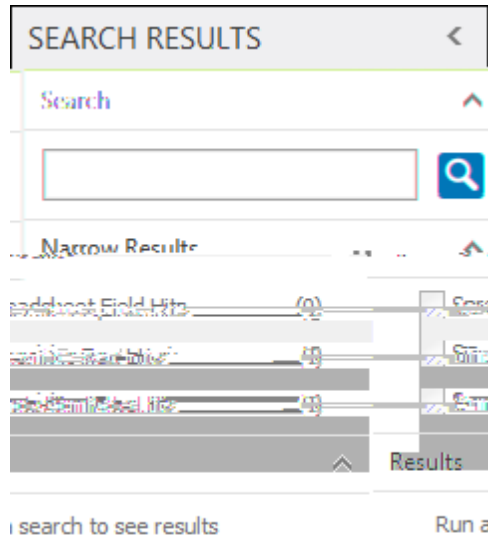
CaseMap now directs you to Lexis Advance® when Docket & Document searches are performed using the 'Search Dockets & Documents' function located in both the Objects - Persons and the Objects - Organizations spreadsheets.

See [Using online research tools](#) for additional information.



GYUfW F Ygi `hg

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



- **GYUfW** pane — Allows full-text searches to be run on case records and linked files.
- **BUfck F Ygi `hg** pane — Provides options for narrowing search results by

of the spreadsheet name.

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.

 7UgY`G\cfHW/hg`dUbY

The Case Shortcuts pane has three tasks panes:

- **GYUfW** pane — Allows full-text searches to be run on case records and linked files.
- **: Uj cf]HYg`l** Contains icons for the spreadsheets used most often: Facts, 19(u)-34(s)-62(



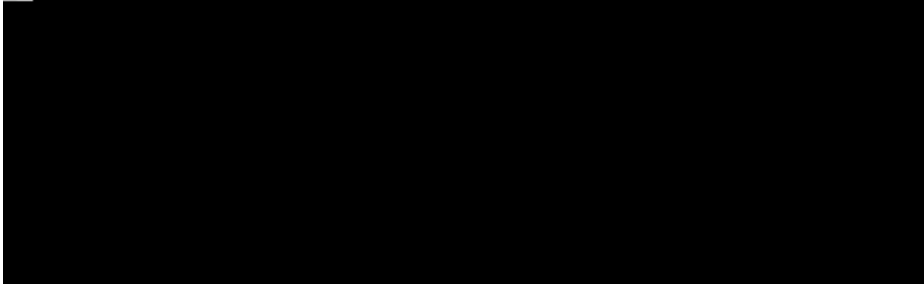
 GYUfW`FYgi`hg`dUbY

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

- **GYUfW** pane — Allows full-text searches to be run on case records and linked files.
- **BUfck`FYgi`hg** pane — Provides options for narrowing search results by search hits

 [_5ffck `VUf](#)

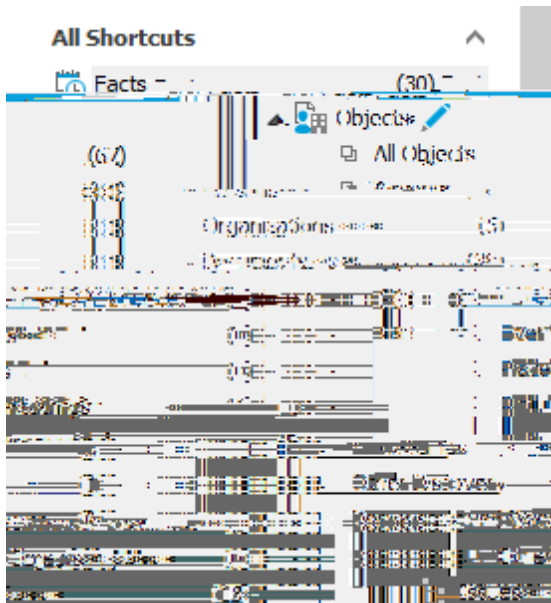
The Arrow bar allows you to collapse or expand buttons to maximize the pane view.



[Related Topics](#)

[Navigating CaseMap](#)

[Modifying Navigation pane display](#)




[Changing toolbar buttons and settings](#)

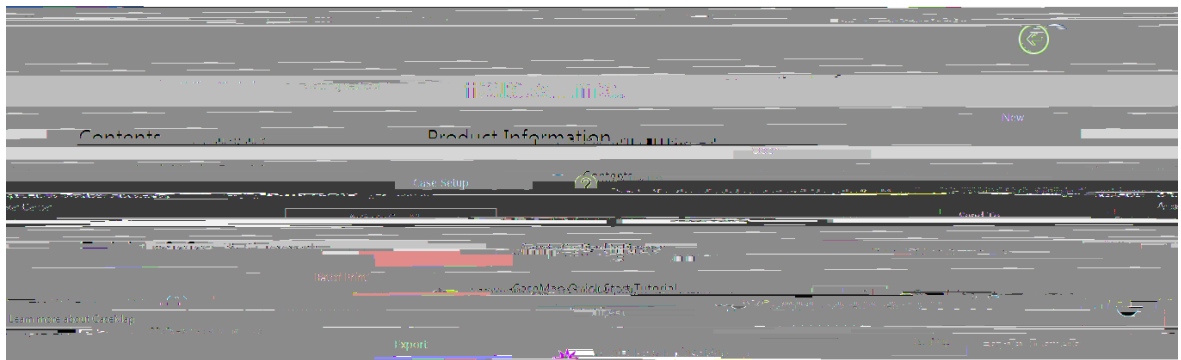
Changing toolbar buttons and settings

CaseMap allows you to add and remove toolbar buttons and settings for your personal view.

[Hc`UXX#fYa cj Y`hcc`VUf`Vi Hcbg](#)

1. On the **E i JW`5WVgg** toolbar, click the **AcfY`6i Hcbg**  icon





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 refreshing it. CaseMap has a Refresh Example Case

As you get familiar with working in CaseMap, you will find many reasons for how it improves

▣ [@YUfb'Zci f'a cfY`ja dcfHUbhdHfa g](#)

- **@b_** — A connection between two case elements, e.g., a connection between a fact and the issues on which that fact bears.
- **GYUfW**

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



[Quick Reference Card](#)

Lesson Two - Analyze

Analyzing case data tells you what you know and can point the way to important information

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 ex # fields count links between case elements drop-down.

 [7ca d\] \]b\[fYgYUfW](#)

CaseMap -71(x)as exee spreadsheets for you to use in compiling and analyzing research:

- **5i hcf]hYg** — Track and organize your authorities by epe and jurisdiction, and link ex research direcey to issues e support your case strategy.
- **9l hUWg Zfca 5i hcf]hYg** — Track and organize extrace by entering summary descriptions and notes needed e track its relevv(r)10(c)21()19(e)-71(o)-60()19(t)-23(r)1

Opening cases

Case files are databases created to store all the data related the case. Some cases are created and saved locally 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. **Alt+X** — Launches cases saved locally on the network and those saved locally. These case are saved in network folders where other case data

Alt+Y — Launches cases saved locally on the network and written to a Microsoft Access database. These case are saved in network folders where

Alt+Z — Launches SQL cases stored on the Wide Area Network (WAN)

4. Select the authentication you need to use: **K j b X c k g ' 5 i h Y b h j W h j c b** or

Checklist: Creating Cases

Task

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?
* 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?

Checklist: Creating Cases

Task

- Have you determined short name conventions for all people and organizations

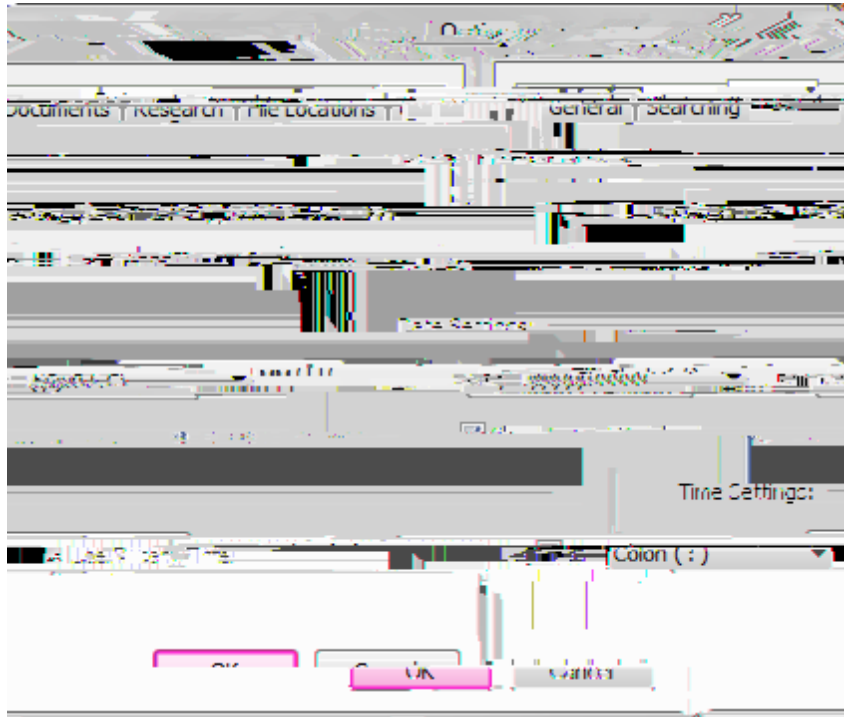
information.

Related Topics

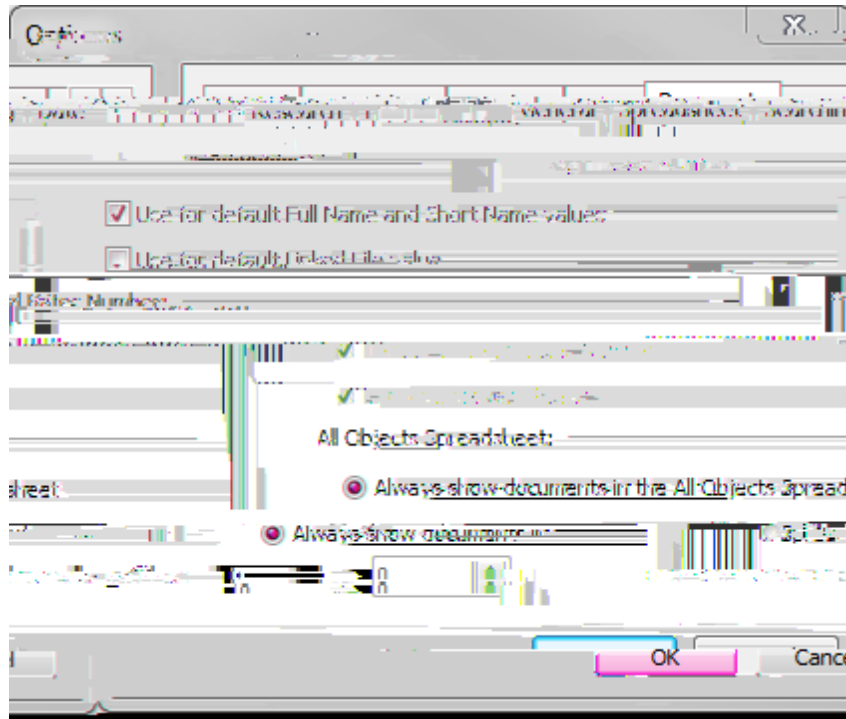
[About cases](#)

[Creating cases](#)





- b. Under **8UH'GYHj[b[g**, in the **GlmY** box, use the drop down arrow to select the Date style setting.
- c. Under **8UH'GYHj[b[g**, in the **8Y'a]Hf** box, use the drop down arrow to select your desired delimiter.
- d. Optional: Select the **G\ck '8UmcZK YY_** check box to display the day of the week in the **8UH' / 'H]a Y** display mode.
- e. Under **H]a YH]a Y**



- b. Under **6V[]b'6UHg'Bi a VVf**, select/deselect the applicable check box(es).
- c. Under

You can only import one template per case.

5. In the **Case Name** box, select the case and click **OK**.
6. Click **Next** to continue.
7. In the **Case Location** box, click **Find** and navigate to the directory location

2. Click **7ca di HYf** to open the **C dYb`@cW` 7UgY** dialog box.
3. Navigate to the folder location where the case you want to delete is stored.
4. In the **C dYb`@cW` 7UgY** dialog box, right-click on the case and click **8Y`YH**.
5. In the **8Y`YH` : c`XYf** dialog box, click **MYg**.
 On the case its (t)-2ontents are now permasntly remved fromyour (s)-62etwork (a)-66(s) longer (a)-66(t)-2(t)-2essible in C3(h)-34(e)-71()19M3(h)-3p.
6. Click **7UbW`** or **7`cgY** to clo4(e)-71()19(c)21the Open C3(h)-34(e)-71()19 window (a)-66
7. On the : **JY** mnu, click ; **YH]b[`G**

Tracking user history

CaseMap's Five Main Spreadsheets

Spreadsheets

[Deleting spreadsheets and records](#)

Changing spreadsheet elements

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

GdfYUXg\ YYhY`Ya Ybfg`Wb` VY`W`gtca]nYX`tc.

5. Click **7`cgY** to save the new view name.

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

Related Topics

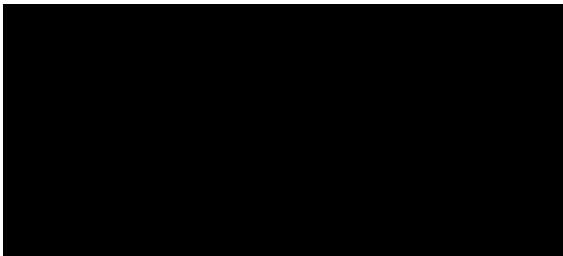
6. Click **7`cgY** to save the new view.

Changing shortcuts in the Favorites panel

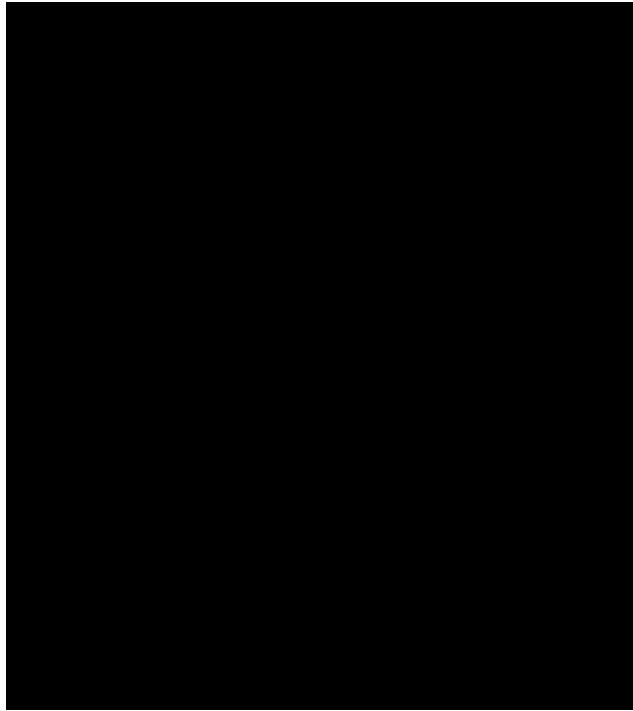
entries. The maximum character limit for a spreadsheet name is 25 characters.



3. In the **5XX GdfYUXg\ YYh** dialog box, type in a singular and plural name for the spreadsheet.



Once ou type in tha singular namx,m murndrg ar snraate aaa e in a inyp pnd plurtsprea



Field Considerations

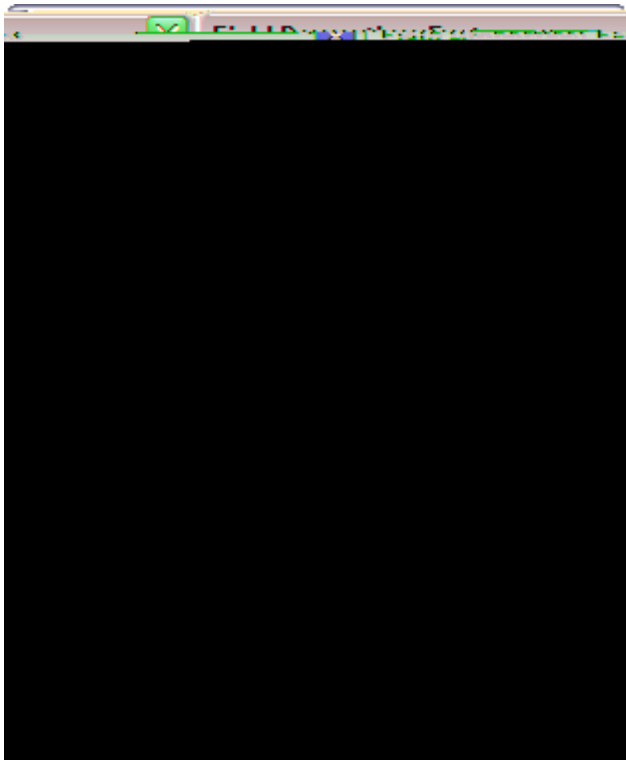
Fields	Description
---------------	--------------------

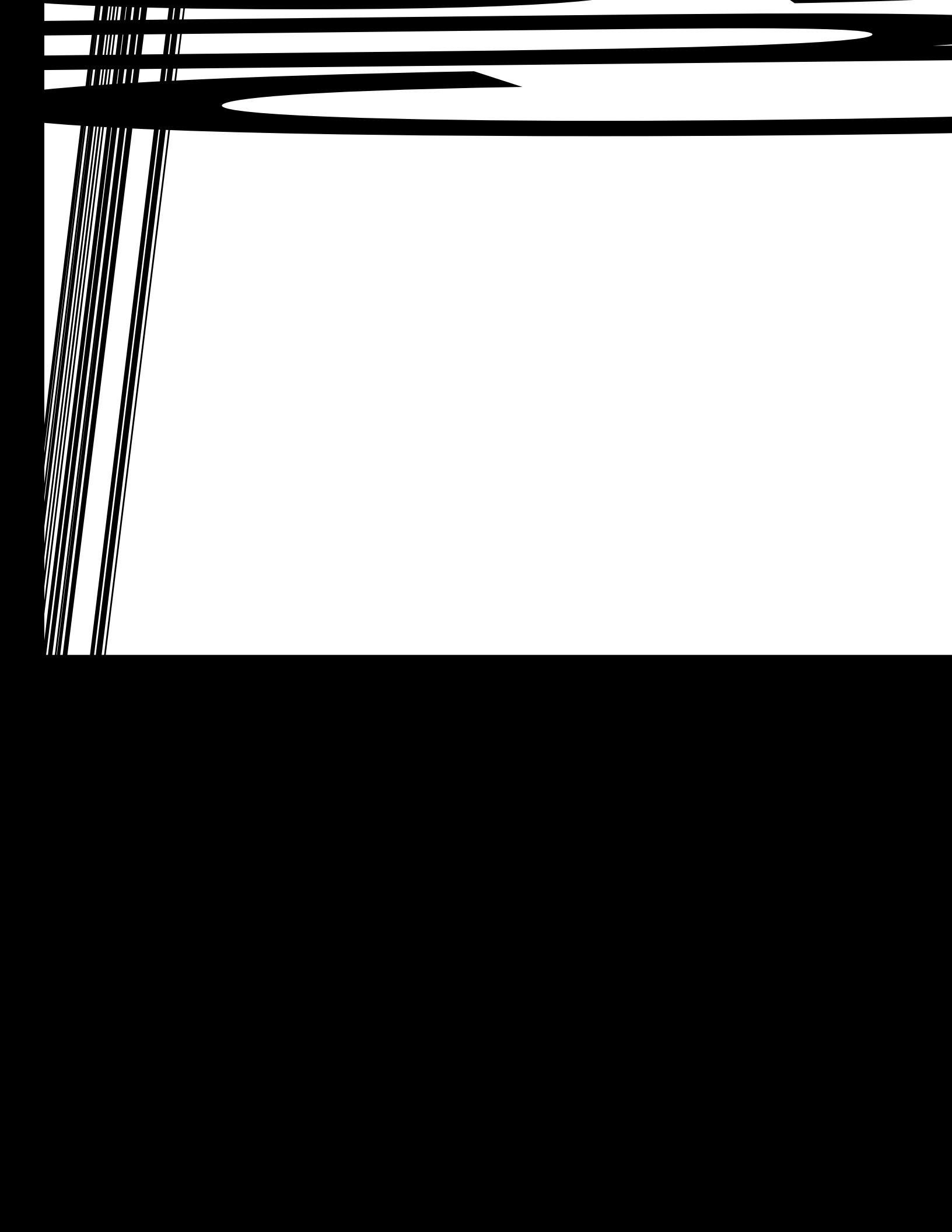
Description



[Gcfh'z\] h'fz'UbX'WJ\['\]bZcfa Uh\]cb' \]b'9j U'i Uh\]cb'Z\]Y'Xg](#)

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







Issues Spreadsheet Field Listing

Facts Spreadsheet Field Listing		
Field Name	What it Displays	Using It
		<06/15/97 (i.e., before 06/15/97). If two or more fa1(t)-23(s)-62()19(sae dae ad time vaue, you

Objects spreadsheet field list

Objects Spreadsheet Field Listing — Common

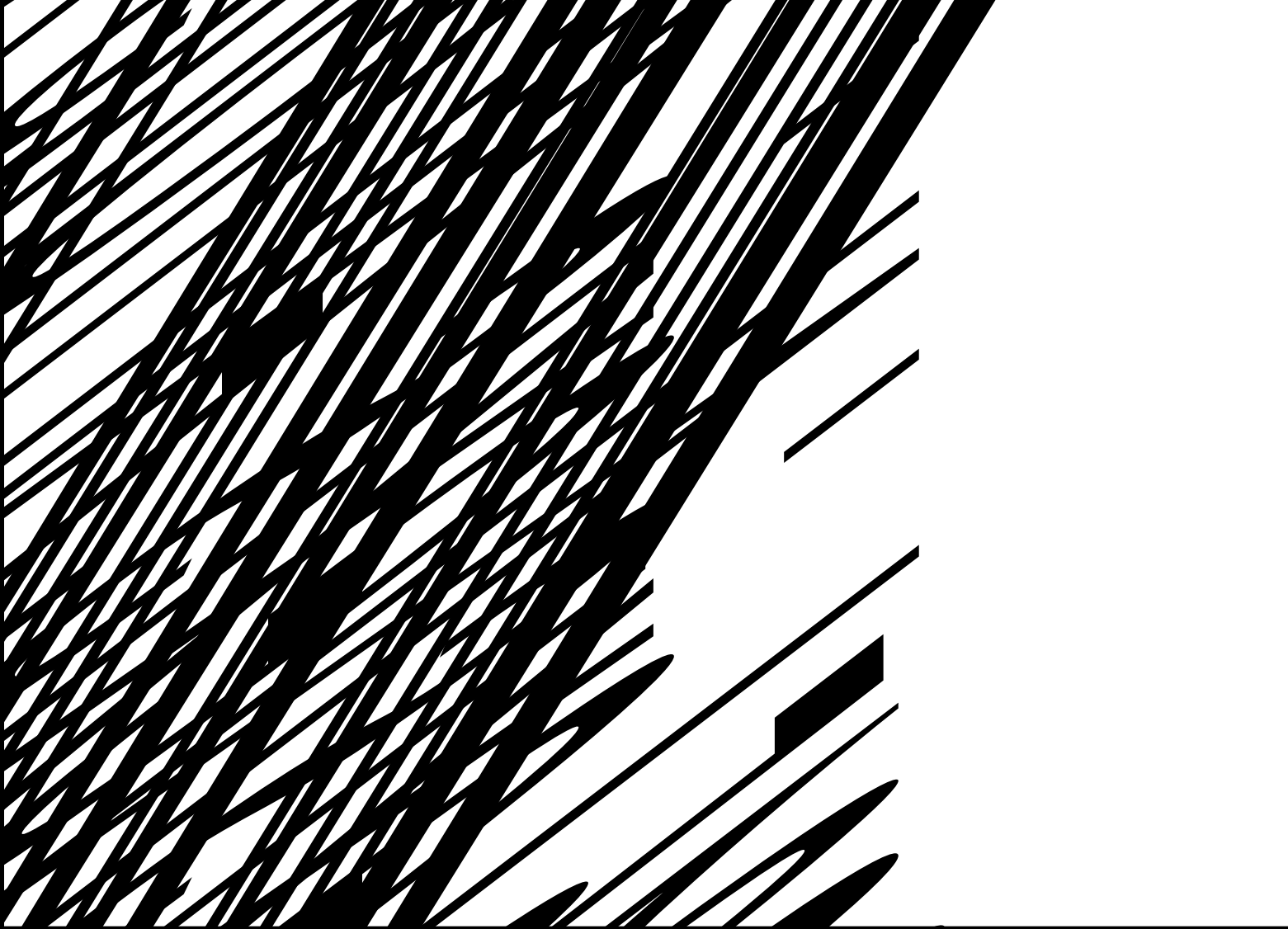
Field Name	What it Displays	Using It
-------------------	-------------------------	-----------------

linked into CaseMap can be



Extracts from Authorities Spreadsheet Field Listing





1. In the 7UgY`G\cfHW/hg

Short Name Considerations

Fields	Description
	reverts to full name display when you move to another cell.

D3333333 -13



Checklist: Short Names	
	Task
	* This is useful to identify a group or organization involved in a matter, when



Related Topics

[About short names](#)

[Changing short names](#)

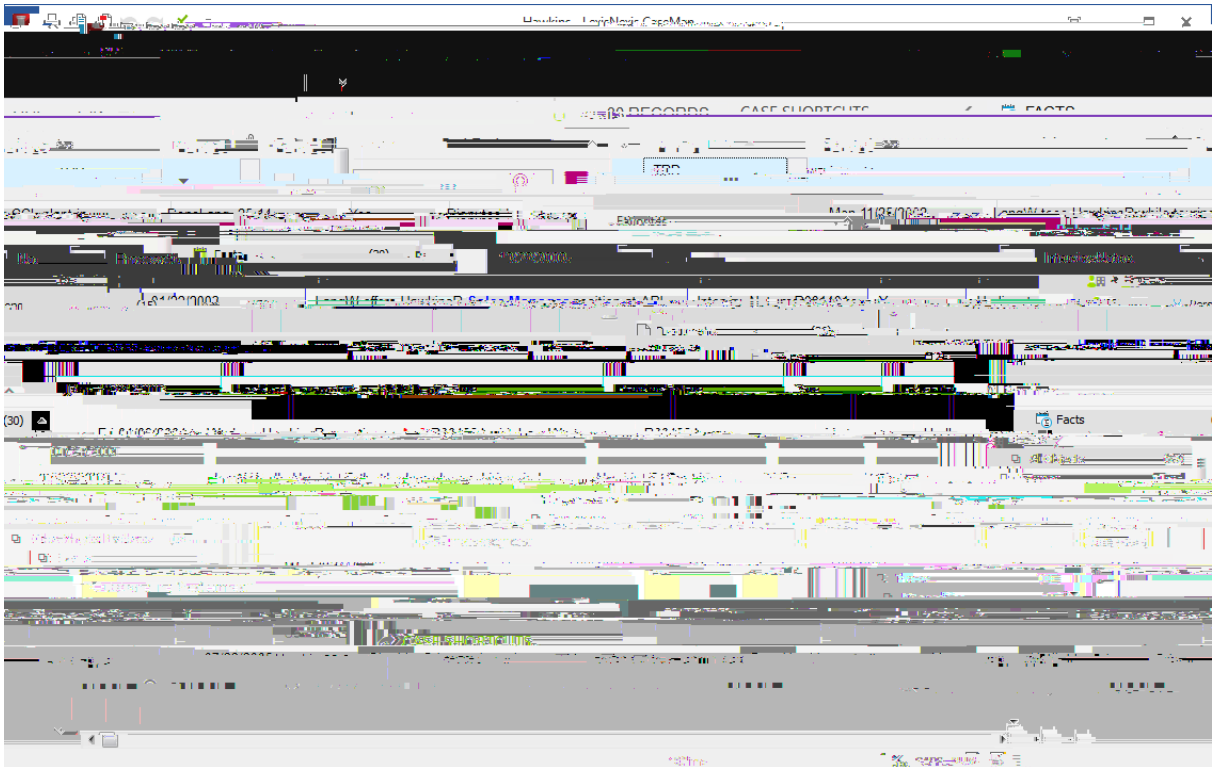





Entering Facts

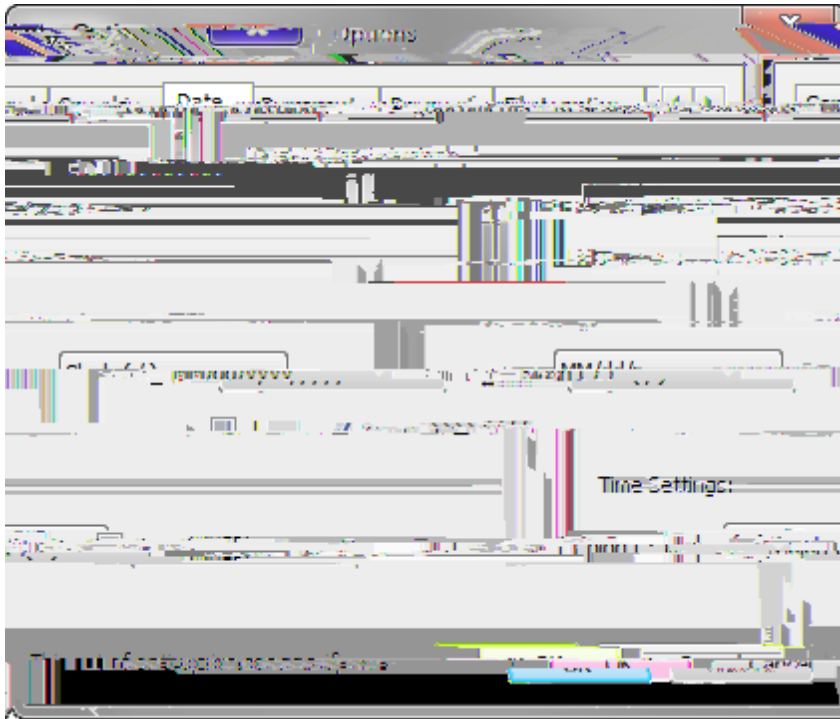
About facts

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.



The easiest way to add facts to the Facts spreadsheet is to cull them from documents as you review them during the discovery process. 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.

 If you have Adobe Acrobat or Reader, you can set up PDF documents as objects and linked facts from them to directly populate the Facts spreadsheet.



Example:

Example:

[_<ck 'XUH'fUb\[Yg'UfY'gcfHYX](#)

Date ranges are sorted based on the first date entered and are best separated with a hyphen.

(([DPSOhr 7/1/08 - 7/4/08

[_<ck 'tc'gdYVZmhja Y](#)

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.

(([DPSOhr 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.

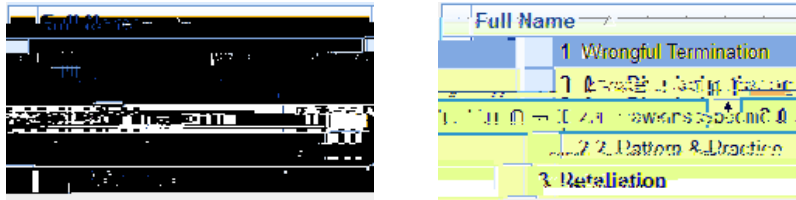


Related Topics

[About facts](#)

[Entering facts](#)

☐_7fYUHY`Ub`]b]hU`]ggj Yg'ci h]bY



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.

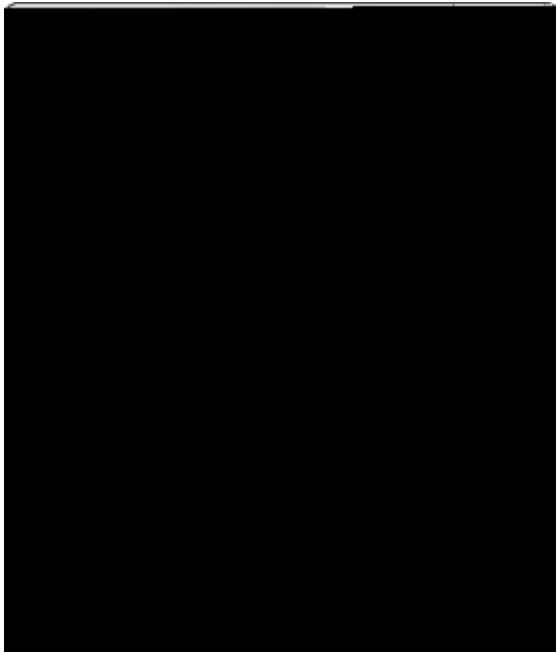
5. Continue entering all sub-level issues in this manner.

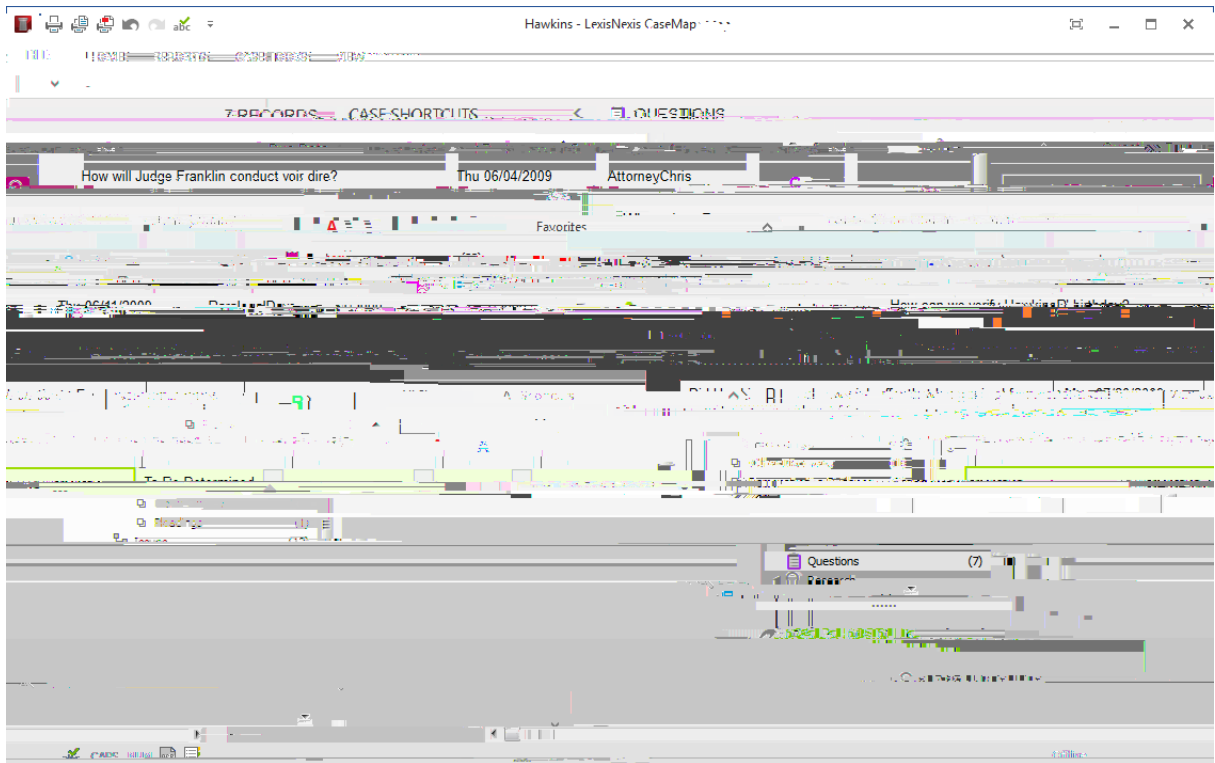
Record data is automatically saved as you navigate to a new cell or record.

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).

 [_Hc](#)





E i Yghjcbg GdfYUXg\ YYhg Cj Yfj jYk



9. Continue entering research authority records as needed.

9. When the **K Y`Wta Y'hc'6i`_`fGYbX'hc'7UgYA Udfik JnUfX** opens, click **BYI h** to continue.
The LaunchTd [()19Giaseap ialo o ispas.

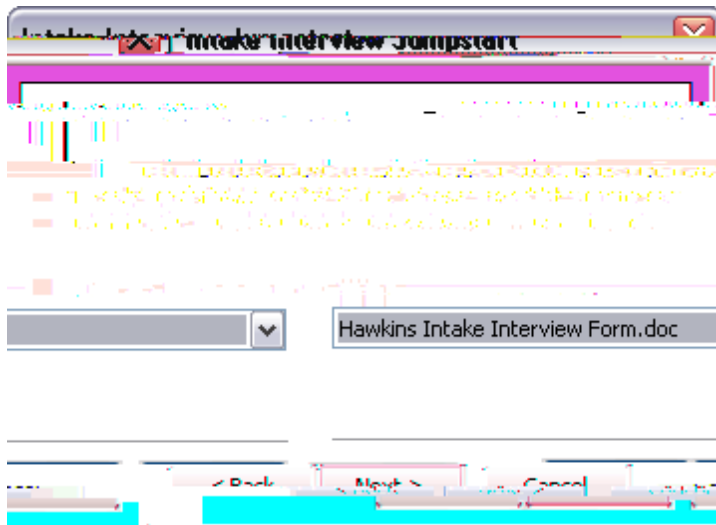
13. In the **Destination Folder** dialog box, verify the case receiving the records and then click **OK** to continue.

The Select a Destination Folder dialog box displays.

14. Click the **Select Folder** button to select a folder where the records will be saved and then click **OK** to continue.

The View/Edit Field Mappings dialog box displays. It allows you to preview, edit, and/or

15. Optional: Click the **DfYj JYk** button to display a data preview screen, and then click **7`cgY** to continue.
16. Optional: Click the **AcXJzm** button if you want to edit the default field mappings provided from Lexis Advance into CaseMap.
17. Click **BYI h** to a ()T82 Tf 55 0 Td [()19 54/C2_0 1-31(.)-303(O)-46(3<04 Td 3<005-23(o)-



8. In the **7\ccgY XUH Y Zcfa UhUbX ghUfh]a dcfh** box, click the date format you want to use or keep the default ()19(d)-44(a)-66(t)-23(e)-71()19(f)19(o)-60(r)10(m)56(a)-66(t)-23(f).
9. Click : **]b]g**

DocPreviewer Overview



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.

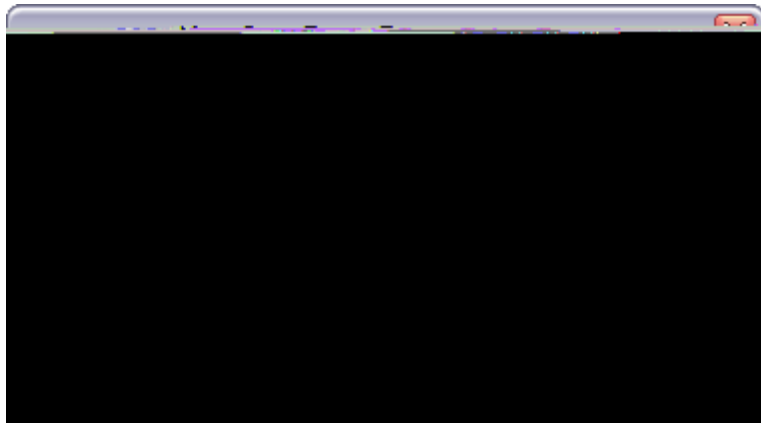
☐ [Hc'i dXUH' 8cVØfYj JYk Yf](#)

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](#)



20. In the **Stamp Order** dialog box, select a PDF file and click the **OK** or **Cancel** button to modify the stamp order.

 [Hc`cWMy`U`fUb\[Y`cZ6UHyg`bi a VYfYX`XcW`a Ybrg](#)

You can also locate a specified range of Bates numbered documents using the Filter feature.

1. In the

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 **7`cgY** when you are finished.

 Hc`hi`fb`cZ`6UH`g`9bX#DUJ`Yg`GnbW`fcb]nUh]cb

[_Hc`YX\]hU`~\]b_YX`D8: `XcW`a Ybh](#)

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 **5WcVUh** source file, click the **7UgYA Ud`8cWdfYj JYk Yf** button, and then click **9X]h 7UgYA Ud`8cW`a Ybh**
2. In the **GYbX`hc`7UgYA Ud!`9X]h8cW`a Ybh** dialog box, set additional field status for this record or click on the **=ggj Y`1]b_Yf** bar to link to case issues.
3. When you are finished, click **C?** to save your changes.

[Related Topics](#)

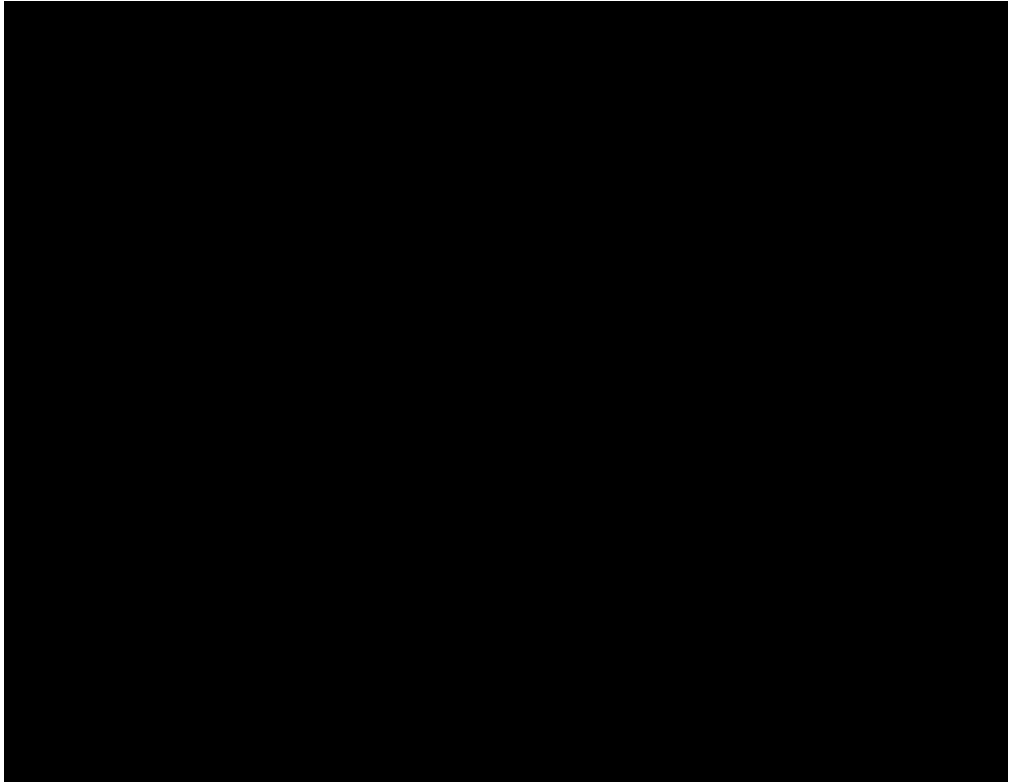
- [About importing data](#)
- [About PDFs and DocPreviewer](#)
- [Sending facts from PDFs](#)
- [Reviewing PDFs](#)
- [Importing documents](#)

Reviewing PDFs

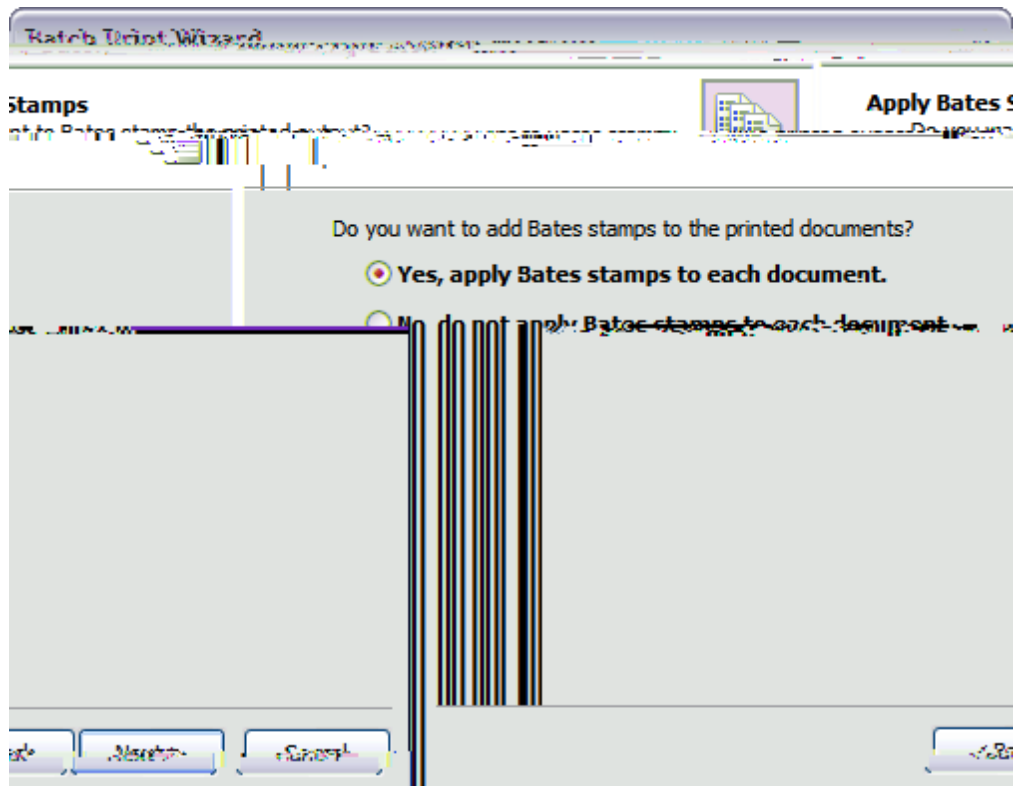
The Review PDFs feature allows you to review linked PDF files in a case spreadsheet in Adobe® Acrobat or Adobe® Reader — without having to flip back and forth between the PDF file and CaseMap.

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.

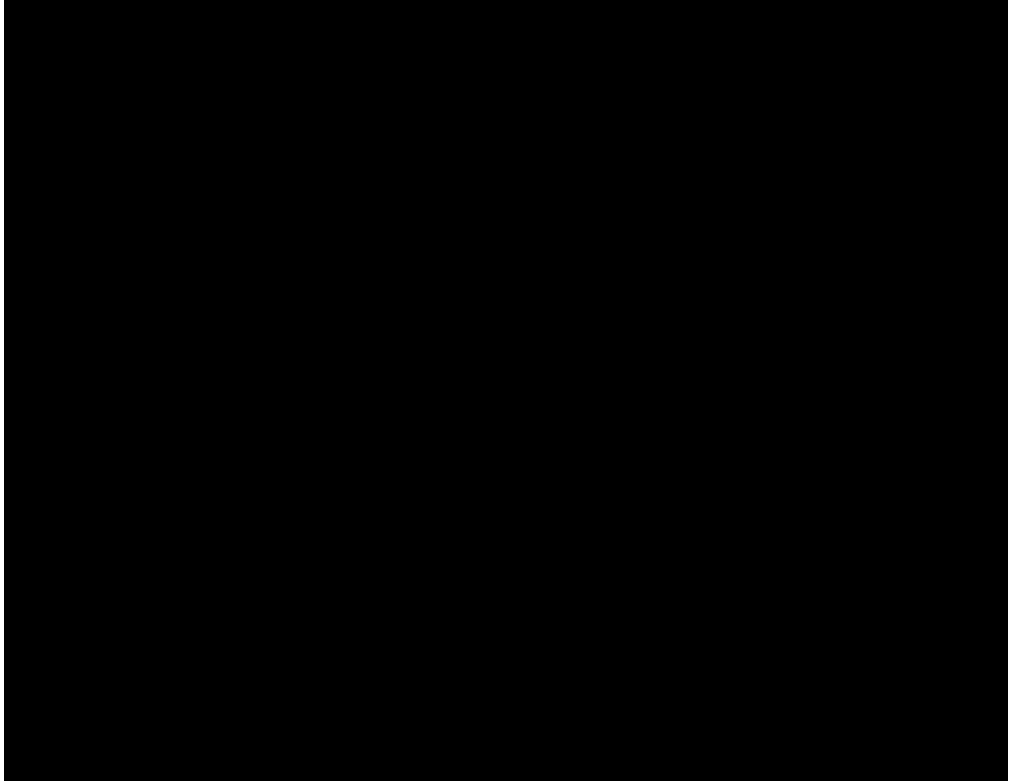
Batch printing linked PDFs



- e. Click **BYI h** to continue.

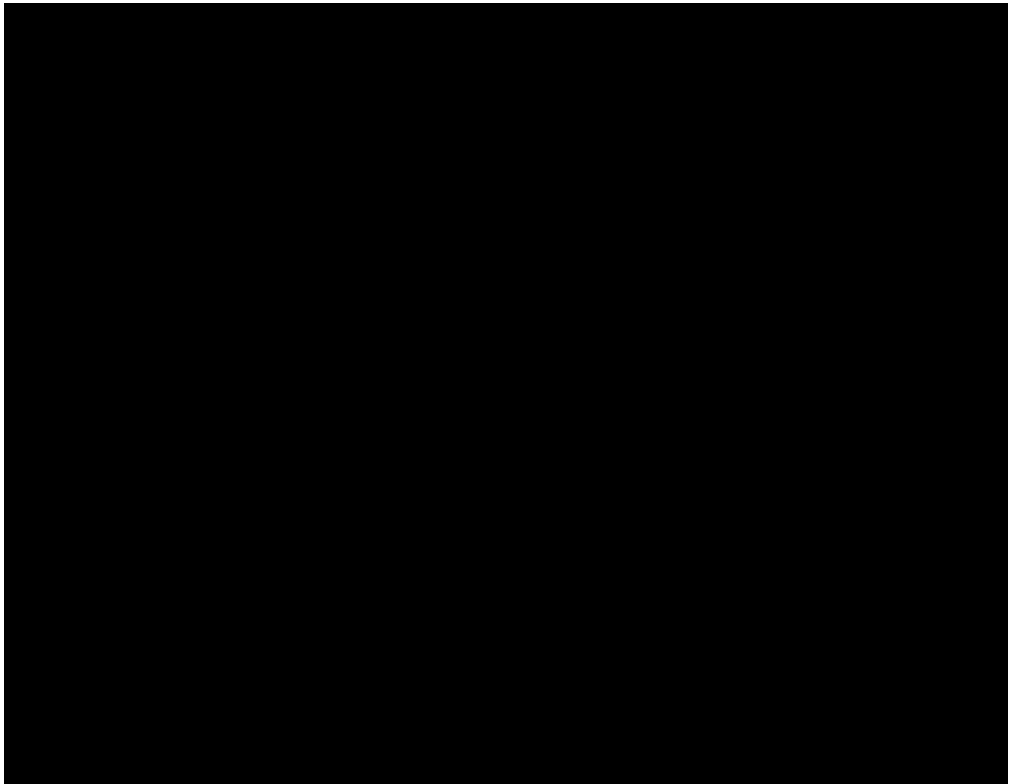


20. Click **BYI h**

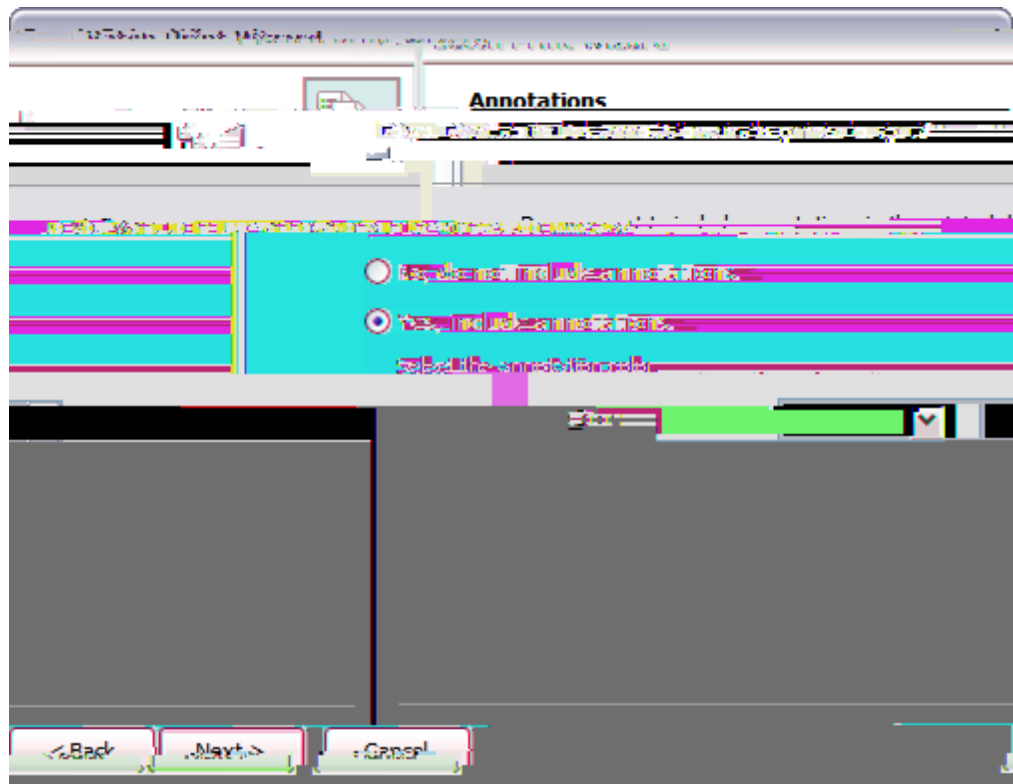


23. Click the link [7 JW \YfY hc cdYb hY ci hdi hZc XYf](#) to review the printed output.

24. Click : [\]b\]g\](#)

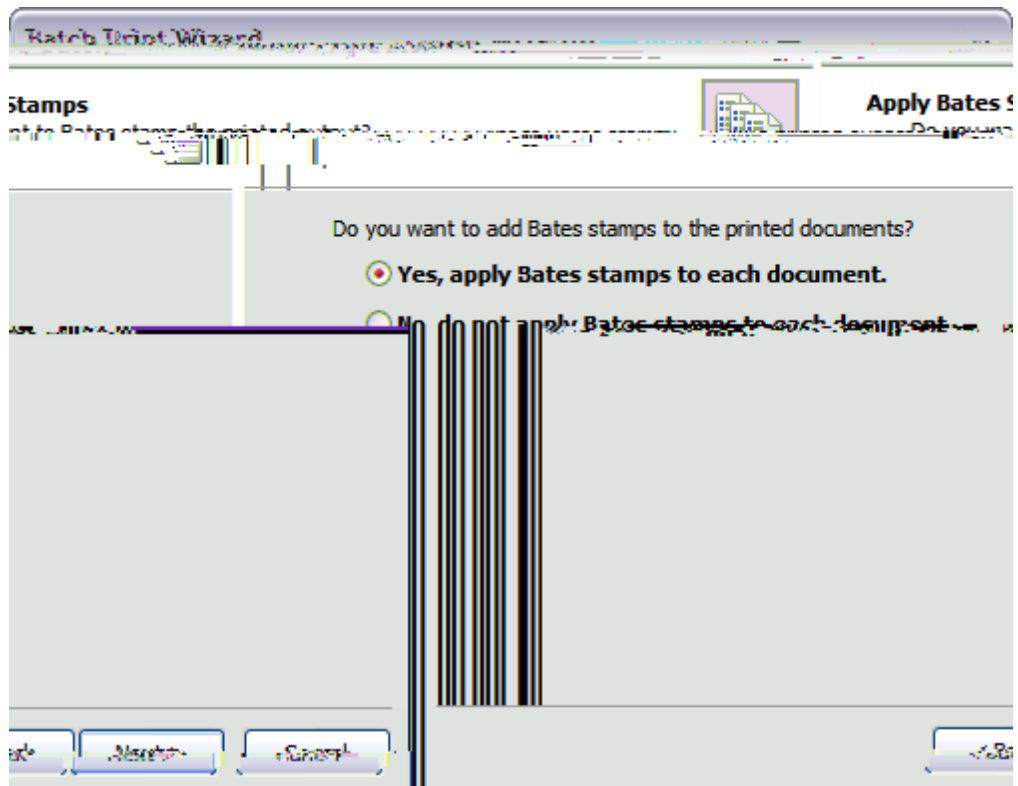


- f. Click **BYI h** to continue.
- g. In the **5bbchjcbg** dialog box, sellTc19(t)-31()w4(.9-23(h)-34(e)-19(t)-23(h)-34(e



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

- h. In the **Print Annotations** dialog box, select whether you want to apply Bates stamps to the printed documents, then click **Print**



- i. In the **6UHg'GHUa d'C dhjcbg**

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. Lin4()s to the PDF source files are automatically created

6. In the **9l dcfhCi hcc_ '8UHU': JY** dialog box, select the folder that contains the emails you want to export, then click Next.

Select the Include subfolders check box, if needed.

7. In the **9l dcfhDYfgcbU': c`XYfg** box, click the **6fck gY** button to navigate to the location where you want the email folder saved.
8. In the **CdYb'DYfgcbU': c`XYfg** box, type in a file name for the .pst file, then click **C?**.

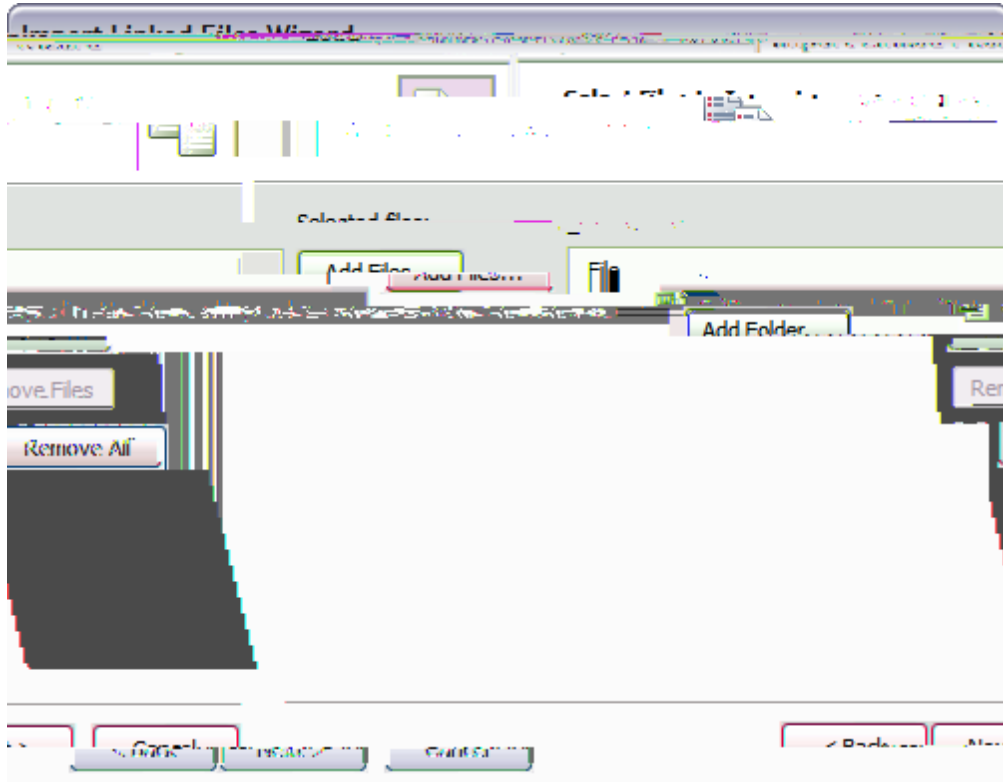
This should be the desktop folder you saved the zipped .PST files.

7. In the **Cdljcbg** area, select the appropriate option for duplicate handling, then click **BYI h**

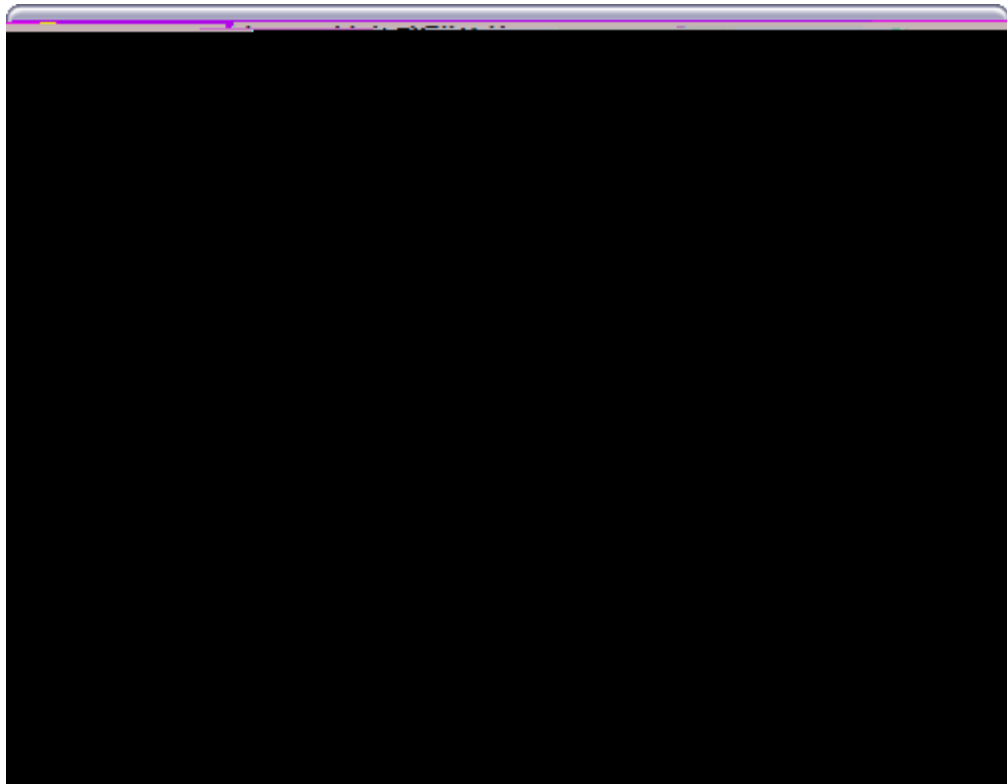
9. In the **Gi a a UfmcZ7cbj Yfgjcb`C dhjcbg** box, review your selections, and click **BYI hto**

For more information, see the [Importing PDFs](#) hee.25 4e

- **5XX: JYg** to select one or more files to import
- **5XX: c`XYf** to import all files within a folder



- CaseMap identifies duplicate files based on directory paths. If a file in a folder has



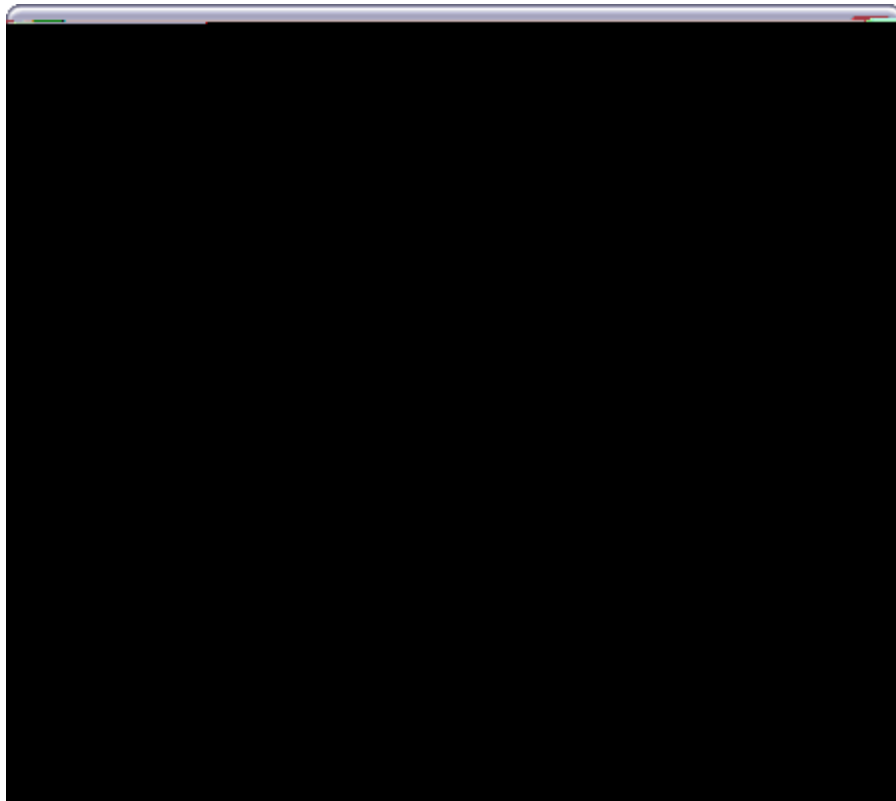
11. Click **BYI h**

5. When the **GYbX'hc'7UgYA Ud** utility launches, select the spreadsheet in whi051>45<00470

3. Select the field mapping structure you want to modify.
4. In the **GY`YVWX`7UgYA Ud: JY`X** area, click the **5XX**, **A cXJzm** or **FYa cj Y** buttons to

Field mappings are saved as a .cmbulkmap file.

4. In the : **JY bUa Y** field, type a name for the field mappings.



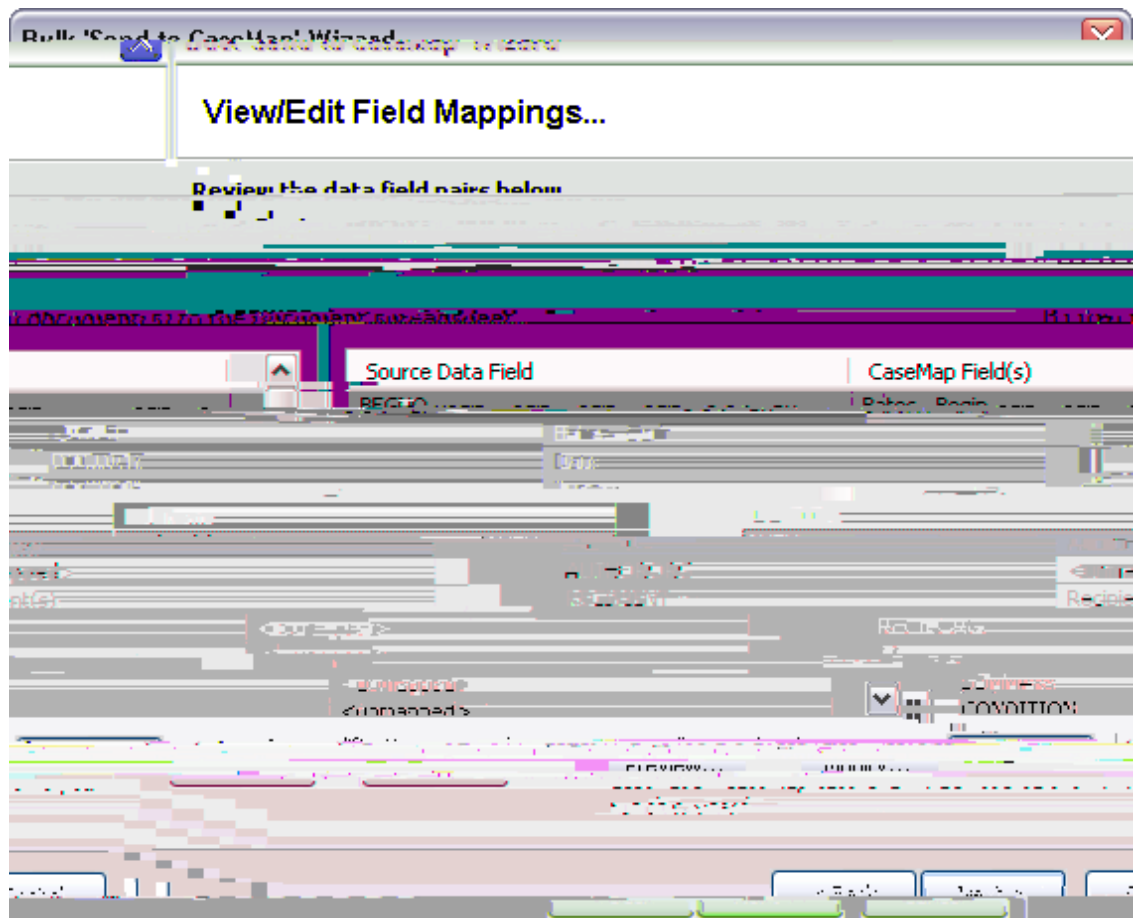


selected.

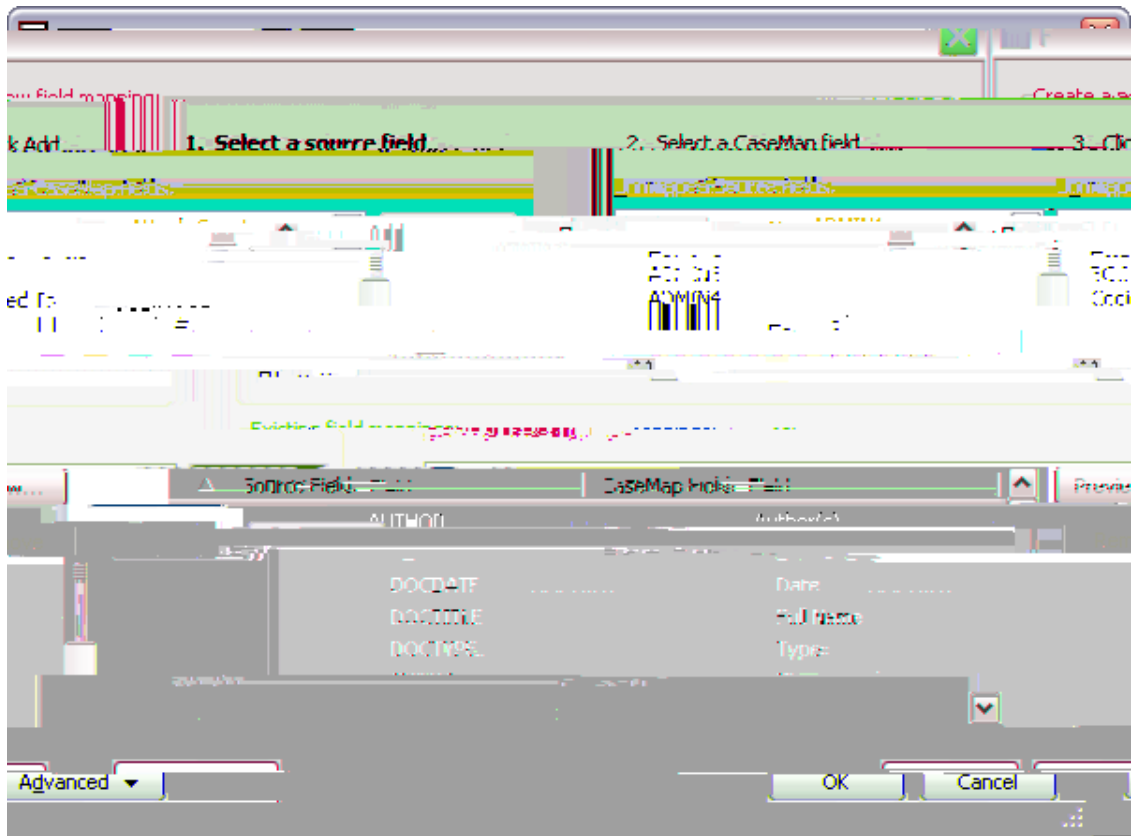
Notice that any fields you populated in the Send to CaseMap utility now display this information in spreadsheet fields.

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 @jb_YX: JY field for this record.





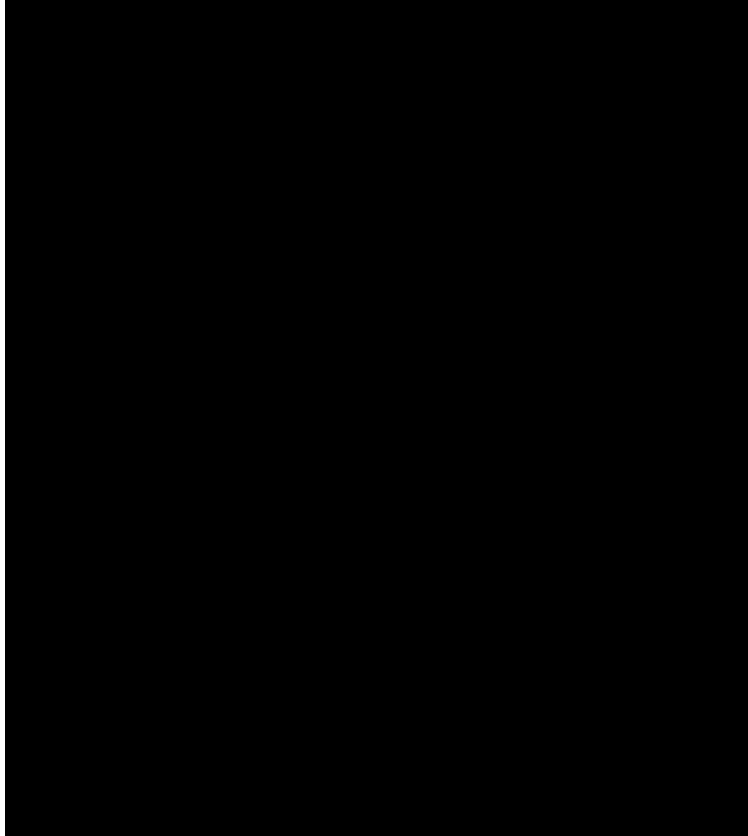
- In the **Source Data Field** box, select a Concordance field in the **CaseMap Field(s)** fields list.

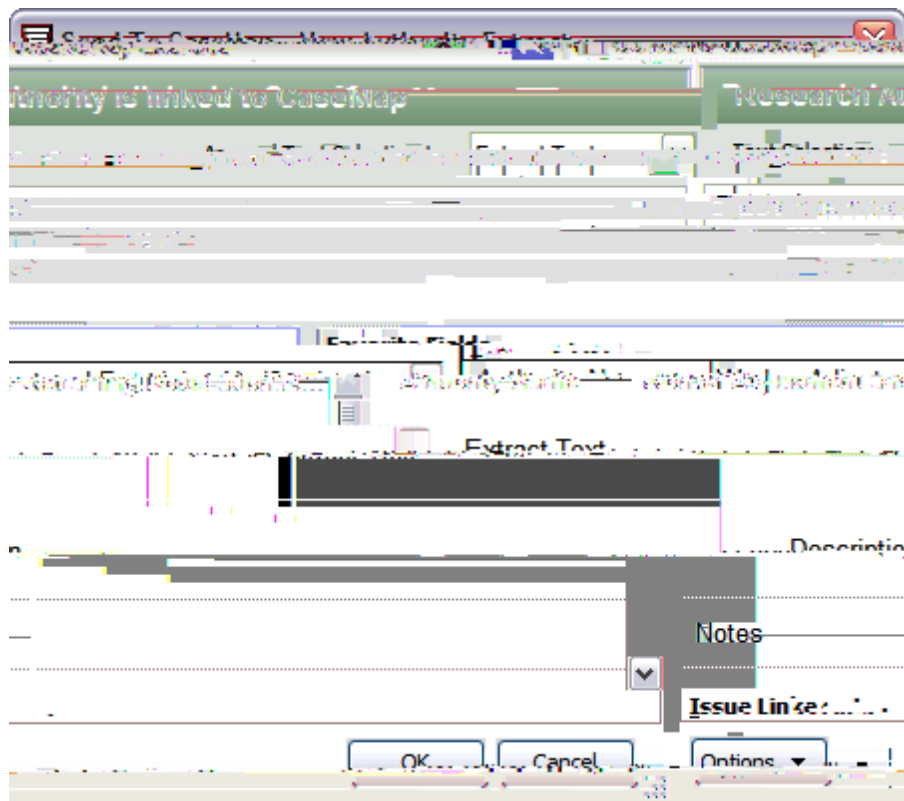


10. Next select the field you want to map to in the **CaseMap Fields** fields list, then click the **Map** button.
11. Continue mapping fields until you are finished, then click **OK**.
12. In the **CaseMap Fields** dialog box, click **Advanced**
13. In the **Advanced CaseMap Fields** dialog box, review the number of files selected and the CaseMap destination, then click **OK**.

Hc WYUH U'byk 'YI fUWZca 'Ub 'UbbchUjcb

1. From the **5bbchUjcb**'a **cXY** list, click **5bbchUH 'HYI h**
2. Drag your mouse pointer over the text you want to annotate to open the New Annotation dialog box.





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

5. In the **HYI hGY'YMcb** 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 **=ggi Y@lb_Yf** bar at the bottom of the box and select check boxes for applicable issues to link this extract.

8. When you are finished, click **C?**.

9. In the **7UgY'G\cfHW/hg** pane, click on the **9l hfUVhg'UbX'5i h\cf*** **g**

3. Click the **7`cgY**





[\[\] gY`g\cfhbUa Yg'hc'Ui hca UhjW`m`j\]b_`XUHU](#)

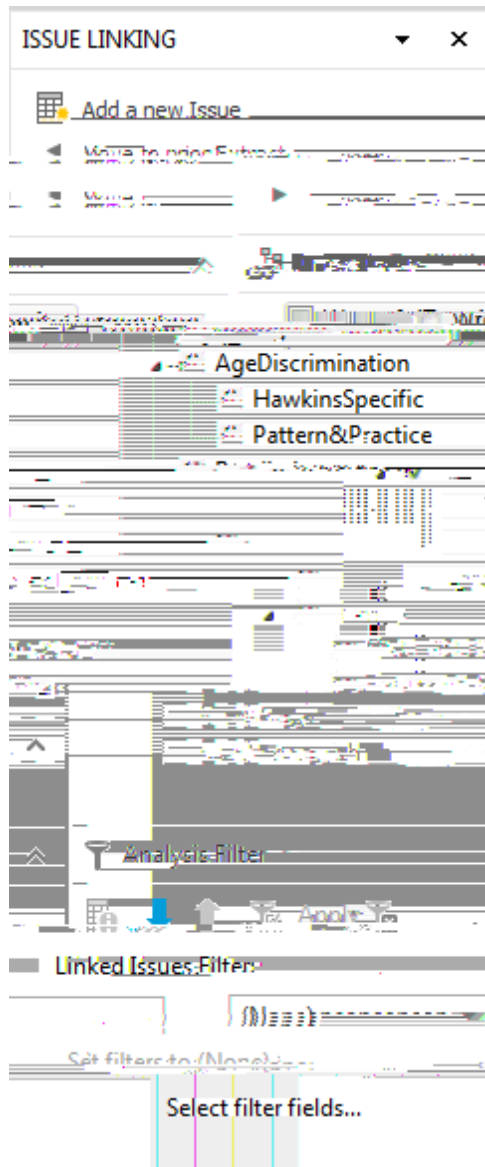
record. Click on the paperclip icon to view the native file, directory path, and type of file that is linked to this record. You can also click on this link to view the source file in its



Analyzing and linking facts

As your Fact Chronology grows, you want to ensure that you differentiate between facts and

following example, notice how the n0 0.733333-99(i)24(n)-99()19(t)-23(h)-34(e)-71()F ct ex



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.

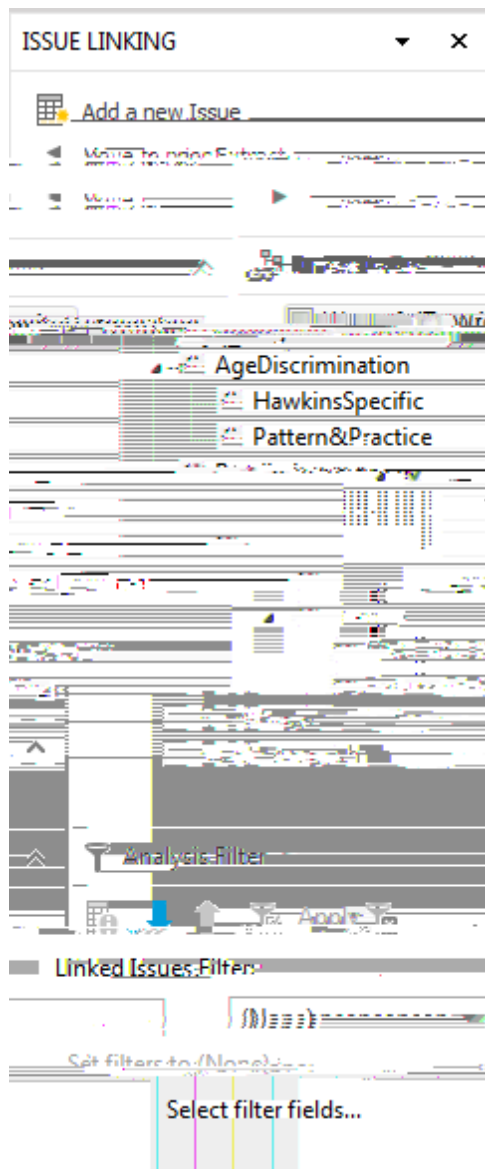
4. Click in the

For more information, see [Entering objects](#).

 [Hc`b_cV^VMg'hc ZUMz ei Yghcbz fYgYUfW](#)

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](#)




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 @j_b_YX' =ggj Yg fie Q` !` ;!!##` 'Nq• !i''BCIçF&#Nqbñ-'3BF!'qÂD‡(ÖCiÅ&B2CCNq\$\$

Showing all facts linked to a set of objects

research and progress. This spreadsheet can be updated throughout the life of the case.



4. In the **HndY** cell, click the type of authority for the record.
5. In the **7 f]h]W]m**

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.

 [Hc`b_hc`Ui Hcf\]hmUbX`YI hfUMfYV&fXg`hc`gci fW`Z`Yg](#)

1. In the **5i Hcf]hYg** or **9l hfUMg`Zca`5i Hcf]hYg** 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 **@b_YX: JY** field.
3. Click on the

- [LexisNexis Dossier Suite](#)
- [LexisNexis Expert Research On-Demand](#)
-

440.25>-710<201(33a36a)2047a15421(a)872-204(0)59)40053387A1D#FP34•EB€`%U 84#Vs• 3333433300”403ICFPc(6>-344

C f [Ub] n U H] c b g spreadsheet.



Related Topics

Using the Bulk Issue Linker

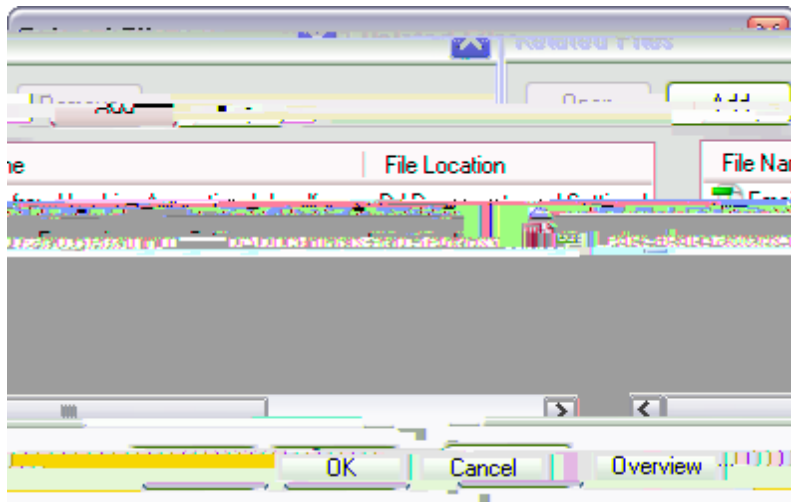
The Bulk Issue Linker tool allows you to link all records in a spreadsheet view to one or more issues at one time, as opposed to linking individual case records to one or more issues as you

[About linking](#)

Linking related files

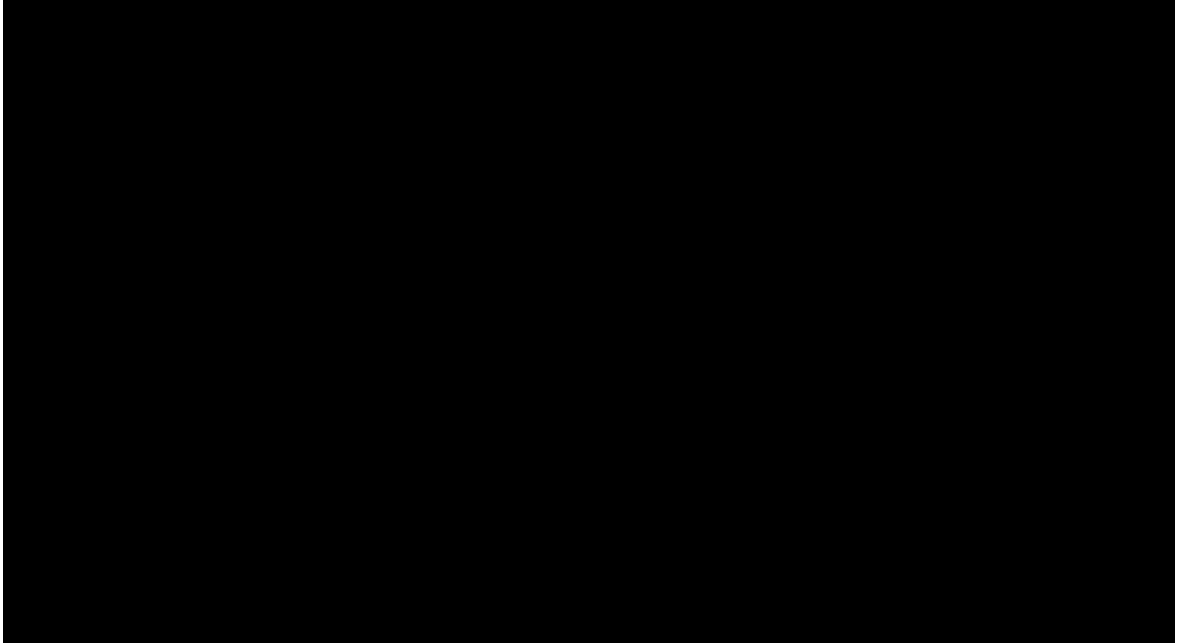
The Related File field is included on each spreadsheet and is only used in rare instances where it's deemed absolutely necessary to add additional files linked to a record.

You can link to various file types: .doc, .docx, .pdf, .xls, .xlsx, .ppt, .pptx, .png, .jpg, .gif, .tiff, .bmp, .wmf, .emf, .eps, .ai, .indd, .indt, .indl, .indh, .indc, .indg, .indp, .indd, .indt, .indl, .indh, .indc, .indg, .indp



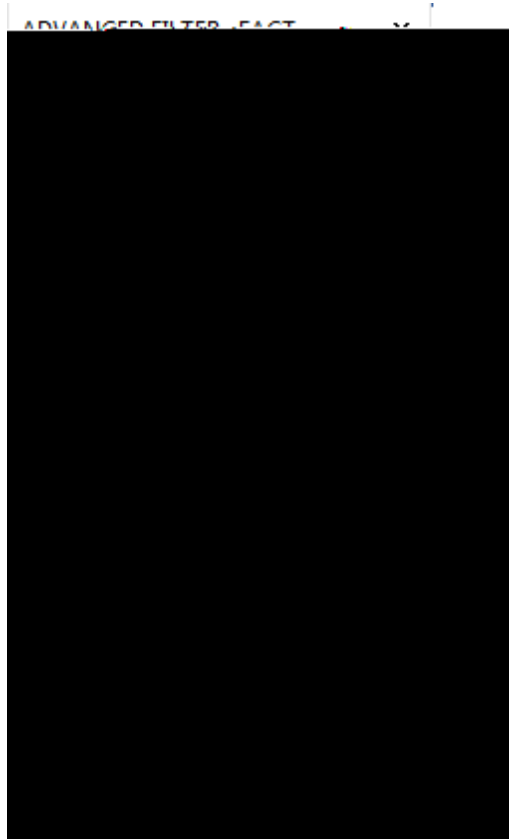
6. In the **GYVMZYtc UXX**

If you want to create your own robust timeline chronology, you can use CaseMap's companion product, TimeMap®. TimeMap 56. a timeline graphing tool that allows you to input critical case facts so you can organize and chart them using facts boxes that float above or on either side of a timeline. You can customize the timeline to best suit your needs.



Use TimeMap timelines during meetings to keep clients and staff up to date on case developments. Use TimeMap's presentation capabilities to share case timelines with clients and staff.

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.



Related Topics

- [Performing basic filters](#)
- [Performing guided filters](#)
- [Performing advanced filters](#)
- [Saving filters](#)

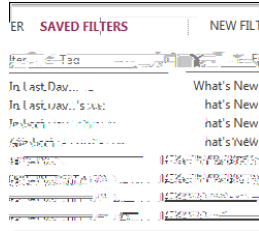
6Ug]WZ] hYf]b[]bWl XYg'lk c'fmdYg.

•



This field is the basis for your filter.

4. In the **8UHY** section of this pane, click **8UHYX**



GUj YX`Z`HYfg`Wb`VY`UMVggYX`Zfca`h`Y`Zc`ck`]b[`c`Vh]cbg.

- Home ribbon > Editing menu > Sort & Filter > My Saved Filters
- Advanced Filter pane > Saved Filters pane (located at the bottom of the pane)

the : i ``HYI hGYUfW button or press 9BH9F .

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 pane will display 24(s

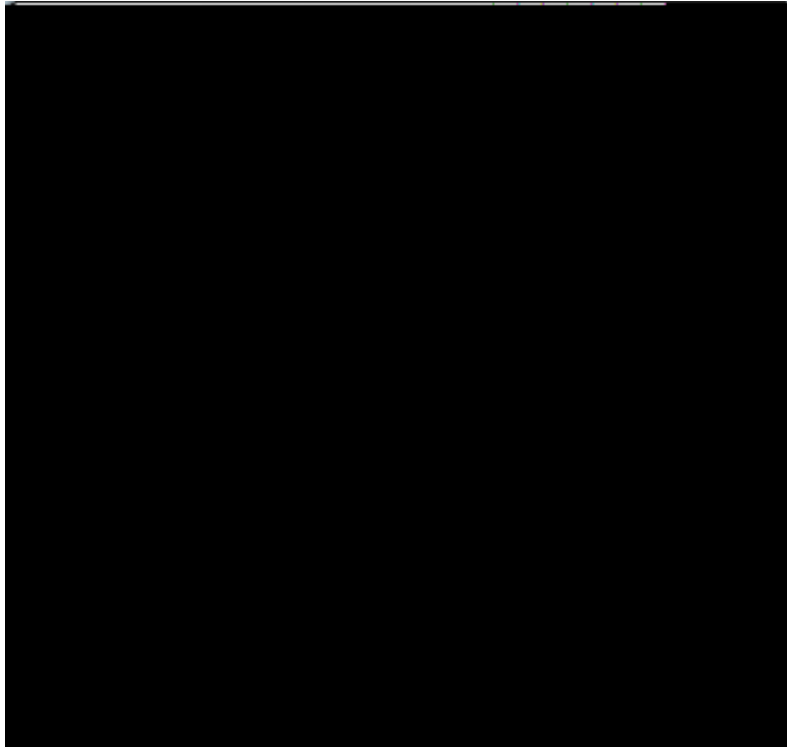
spreadsheet records, text in linked files, and text found in annotation notes for linked files.

☐_@YUfb'UVci hH.Y'GYUfW'FYgi`hg'bUj][Uh]cb' \



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

searches run.



3. Click the search you want to re-run.

The search query auto-fills in the Search Text box.

4. Click **C?** to initiate the search.

The Search Results pane opens and updated search results now display.

Using DocManager

DocManager Overview			
Feature	Description	DocManager Subscription Required	CaseMap Version Required
Bates stamp files			

DocManager Overview

Feature	De9171 0.506 00133 -943 cm ngp4(e)rn
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To activate DocManager, click File > Help & Info > Activate CaseMap DocManager. Follow the steps to activate DocManager online or over the phone.

 [Hc`fYj JYk `gj ddcfH`X`Zj`Y`hndYg](#)

DocManager works with the following files:



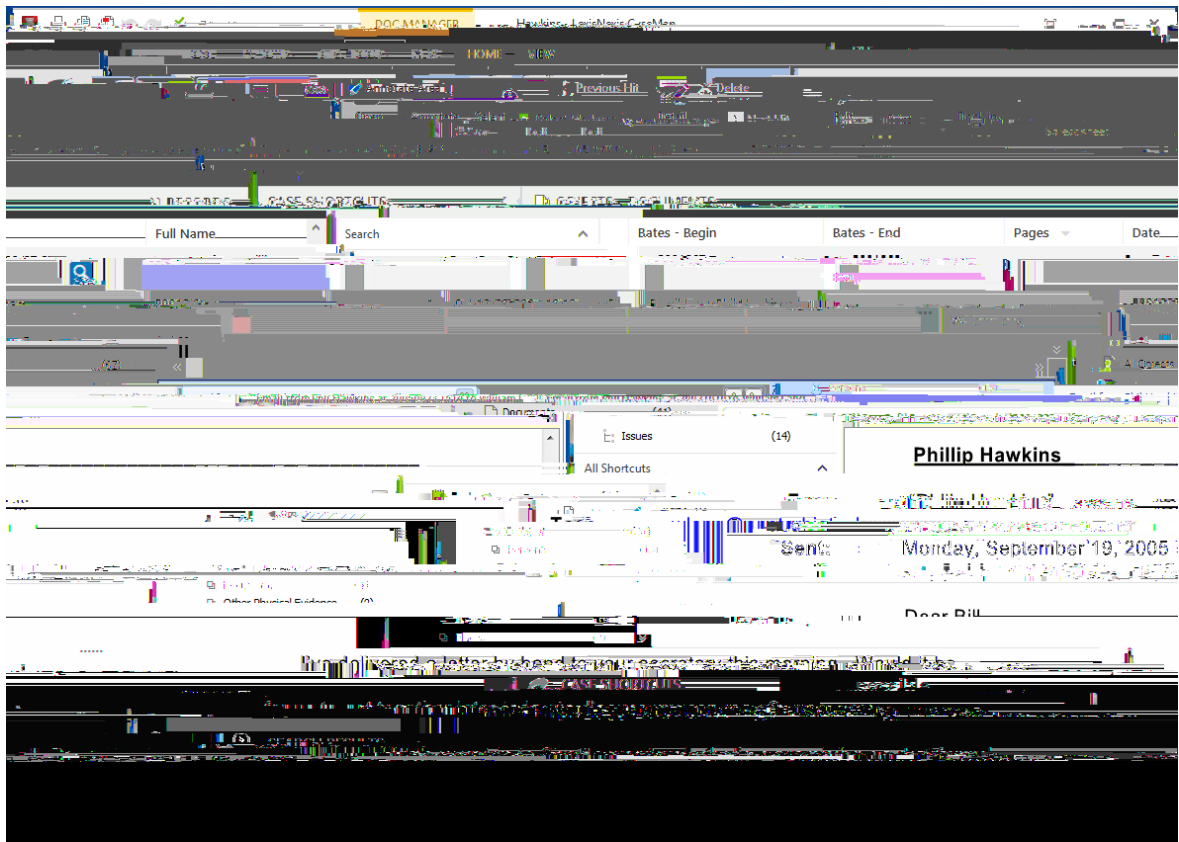
- [Viewing documents and images](#)
- [Navigating documents](#)
- [Adjusting document size](#)
- [Annotating documents](#)
- [Creating new facts/extracts from annotations](#)
- [Editing annotations](#)
- [Deleting annotations](#)
- [Printing annotations](#)
- [Batch printing linked documents](#)
- [Changing 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

If you have run a search, search hits will be highlighted in blue in the document with the



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 fmpgera5T71(f6(d)-4-34(a)-99(i)24(l6(s)-62(e)-71(M)10(a)-66(p

- **5bbcUHY'HYI h**— allows you to select highlight and annotate selected text (default mode).
- **GY'YVñHYI h**— allows you to view annotation content already applied to the document or image.
- **5bbcUHY'5fYU**— allows you to highlight and annotate a region or graphic on the document.
- **GY'YVñA Uf_i dg**— allows you to select an annotation for editing.

When multiple annotations are applied to a document, you can na(i)24(e)- y44¥bT'RQR 1bT'RQNqÔF!4BuDã

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.



[Hc WYUH U'byk 'YI fUWZca 'Ub 'UbbchUjcb](#)

4. Click **C?**.

Related Topics

☐ **Hc`VUHW`df]bhlc`U`df]bhYf**

1. On the **FYdcfhg** menu, select **6UHW`Df]bh**
2. On the submenu menu, click **Hc`Df]bhYf**.
3. When the **6UHW`Df]bhK]nUfX** launch /C2_0 12 T03A>-39<083>-17<0055>-m6>9<00505.

11. In the **DFYZI** field, type in a prefix (optional).

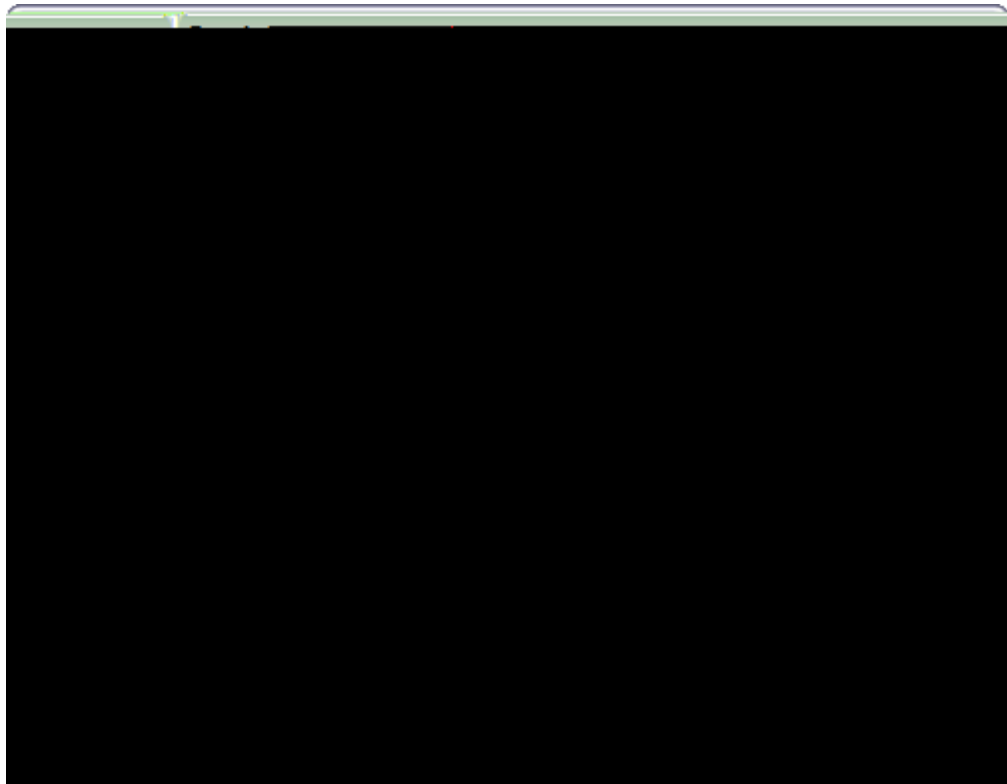


Do not select a printer that generates files. Otherwise, the printer will prompt you to save a file for every document printed.

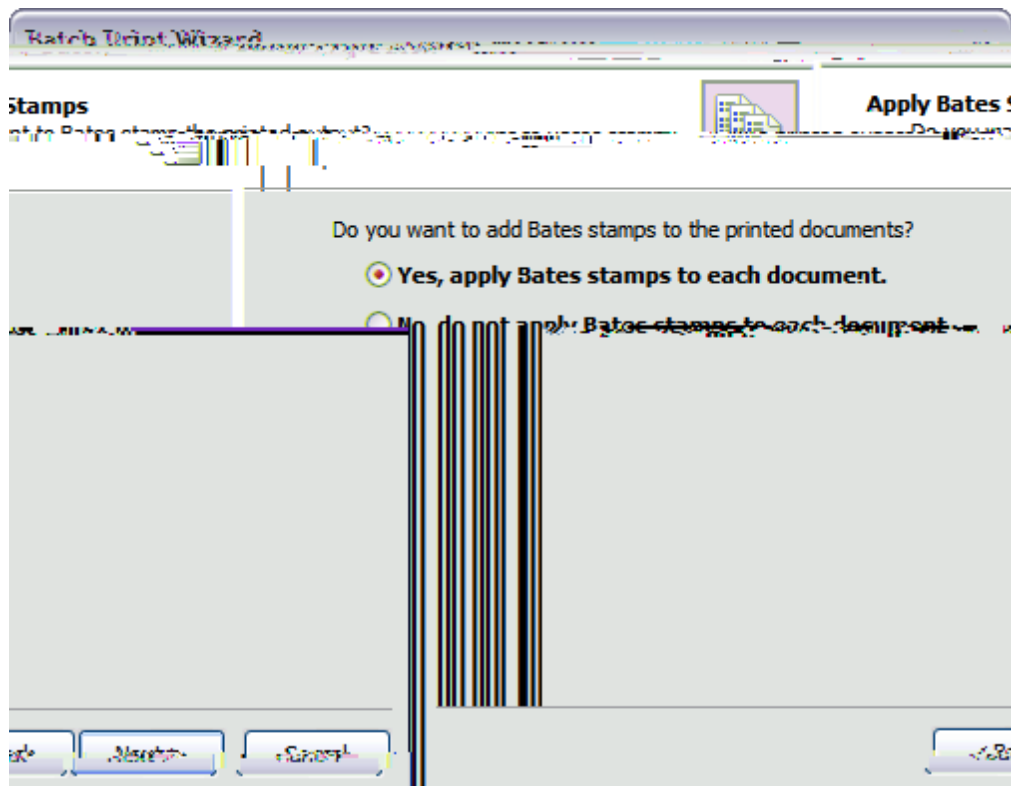
23. Click **BYI h**



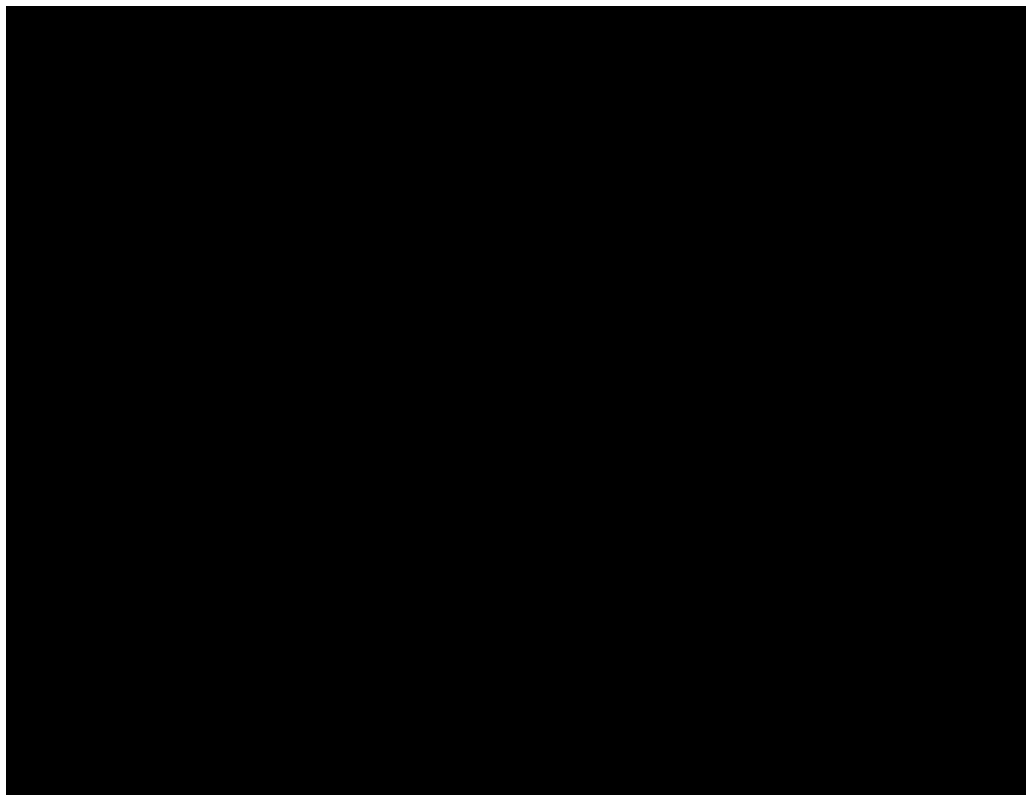




If you want to remove a document from batch, select the document in the Documents to print box, then click the Remove button.



10. In the **Bates Print Wizard** dialog box, select your Bates stamp options.



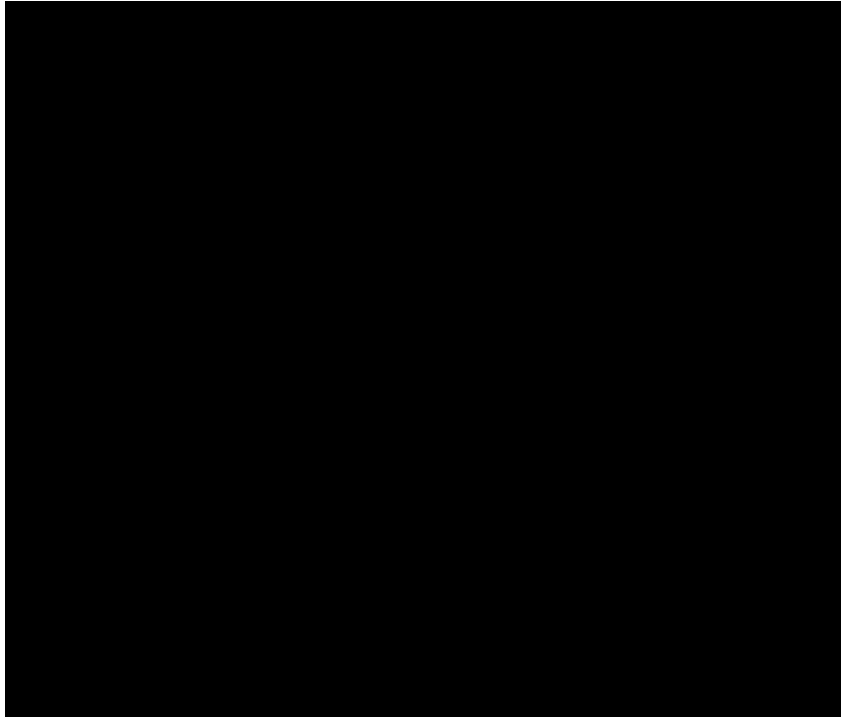
11. In the **DfYZI** field, type in a prefix (optional).

The prefix precedes each Bates stamp number and can be any combination of 26 letters.

window within CaseMap or move it to a secondary monitor. It all depends on your monitor setup and viewing preferences.

How to Use CaseMap to Link Documents and Images

1. In **CaseMap**, select a spreadsheet (e.g., Documents) and open the linked file (document/image) (d)-44(o)-60(c)21(24(m)56(a)-66(g)-448i)24(e)-71(w)-99(i)24(n)-344()19(f)19.4 1



c. Optional: To view a document/image in the DocManager:

 Hc`a Ud`Ya Uj`Zj`Xg

1. In **Ci`cc_**, click the **GYb`9a Uj`fc`7UgYA Ud** button to open the **GYb`9a Uj`fc`7UgYA Ud** dialog box.
2. Click the **: jY`X`A Udd]bg** button to display the **: jY`X`A Udd]bg** dialog box.

CaseMap provides a list of (s)ing (M)ed (g) (L) (X) (A) (U) (l) (n) (g) (Y) (A) (U) (d) mapped for () 1371(d)-44 () 19(

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 receive an email to CaseMap, the field mappings are shared with other case users.

1. Click the **Settings** button and then click **Field Mappings**.
2. In the **Field Mappings** area, click your field mapping preference: **Default**, **Static Text**, or **Hard Returns**.

This area defaults to displaying all mapped fields.

3. Select the field mapping structure you want to modify.
4. In the **Field Mappings** table, click the **Settings** icon for the field mapping you want to modify.

Editing Data

About editing data

4. Navigate to another cell or record to save your changes.

 [Hc`Vtdm#dUgh`fYVfXg](#)

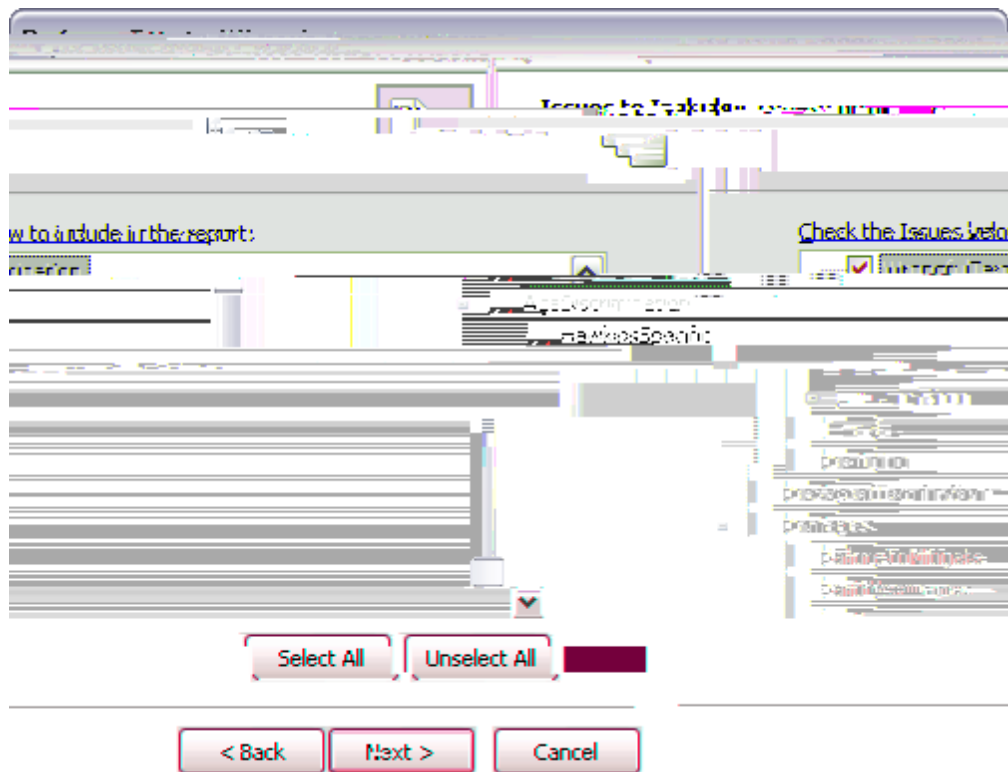
1. In the **7UgY`G\cfHW/hg** pane, click the icon for the spreadsheet (e.g., **8cWa`Ybhg**) you
ç•KUy333E^`ö`Đ`DVH wo(e

 Hc]bgYfhU`gna Vc`]bhc`U`fYV&fX`W`

1. Locate the record and cell area where the symbol will be placed.
2. On the **<ca Y** tab, click **Gna Vc`** to open the **=bgYfhGna Vc`** dialog box.

We recommend that you save exported copies of reports and ReportBooks in a Reports





6. Select or clear check boxes for issues, then click **BYI h**
7. In the **ggj Y: JY Xg** dialog box, select whether or not you want to include additional fields.

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



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

CaseMap Summary Judgment Report

Case: Phillip Hawkins v.

Anstar Biotech Industries

Status Filter: Undisputed...

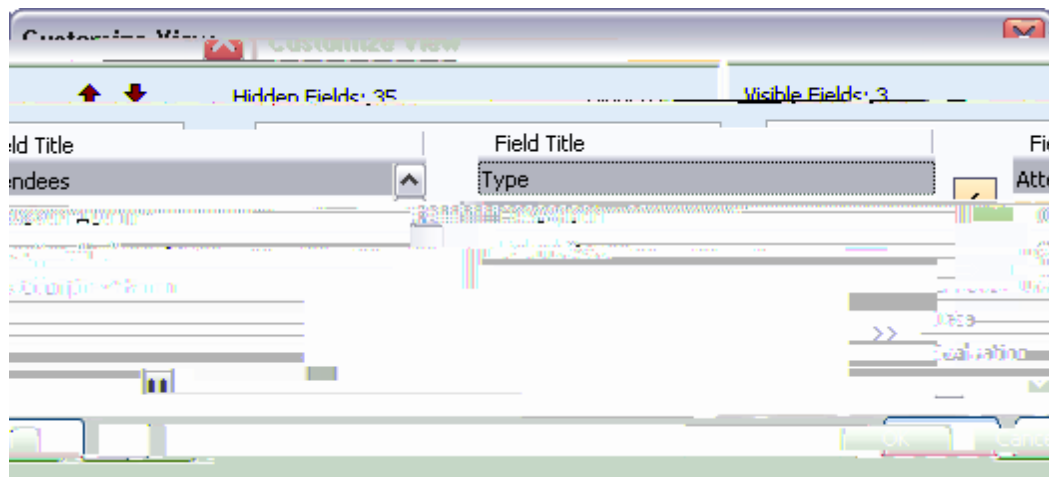
Material Filter: None

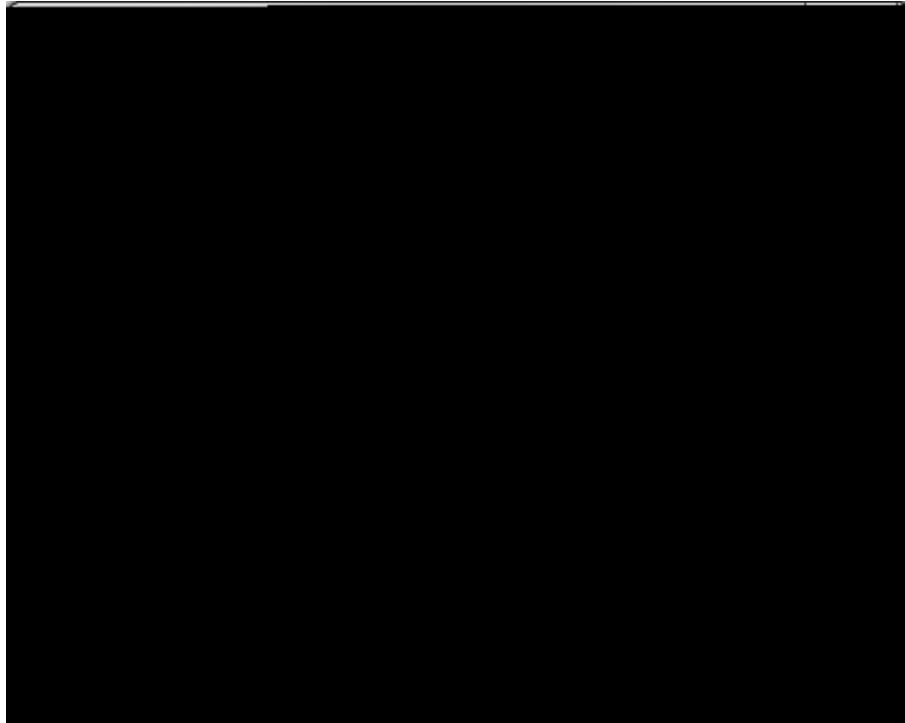
Created: 10/26/2015 10:00 AM

 [Hc'df\]bhU'Gi a a Ufm>i X\[a YbhFYdcfh](#)

1. On the **FYdcfhg** menu, click **Gi a a Ufm>i X[a Ybh**
2. When the wizard launches, click **BYI h**
3. In the **7i gca]nY FYdcfh** dialog box, click **Mgž='k Ubh'c Wgca]nY h.Y'fYdcfh** and then click **BYI h**
4. In the **=ggj Yg'hc' =bVM XY** dialog box, notice that all issues are 1 0 Td.57>0>0>0>0>0>

2. When the **6mCV^YMFY** cf **K JnUfX**





1. In the **7i grca]nY F Ydcfh6cc_** dialog box, click the **7cbZ"GHUHa Ybh** button.
2. In the **9X]hF Ydcfh6cc_ `7cbZ]XYbh]U]lmGHUHa Ybh** dialog box, select the **9bUV`YX** check box under the Settings heading.
3. In the **9X]hF Ydcfh6cc_ `7cbZ]XYbh]U]lmGHUHa Ybh** dialog box, click the **9X]h`7cbHYbh** button.
4. In the **9X]hF Ydcfh6cc_ `7cbZ]XYbh]U]lmGHUHa Ybh`7cbHYbh** window, modify **ck ext** as well as font size and **styce**, **sycbols**, and fields **4(n)-39(.)-969(17h)-340057>1e,(yc)2lc**
4. In **819(t)-23(h)33<00739<0003>9<033<00739<54(e9(1039<54(e9(10)33 89 49(iw5-44**

3. In the **9X]hFYdcfh6cc_`=bfCXi Wjcb** dialog box, click the **9X]h7cbHbh** **9X]hFY**

5. Click **7`cgY** 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

The Linked File Text Hits report contains text excerpts of the search hits found in linked files after a full-text search is run. CaseMap will locate search hits in the file's text and the file's properties, such as the file name of a PDF or Word document.

The report displays 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. Each linked file's full name is highlighted in a gray bar so you can easily distinguish the transition of each linked file included in the report.


 [_Hc`df\]bhU`@\]b_YX': \]Y`HYI h< \]hg`FYdcfh](#)

1. In the **GYUfW** field, type in a search and click the **: i ``HYI h`GYUfW** button.
2. In the **GYUfW`FYgi`hg** pane, click the [@\]b_YX': \]Y`HYI h< \]hg`FYdcfh](#) link in the **FYgci fWg** pane.

The report now displays in the CaseMap DocManager window with search hits highlighted.

3. In the **8cVA UbU[Yf** window, scroll to view all linked documents printed in the **<]hg**

linked file listed an icon indicates its file type and the number of search hits displays to the right

-  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.

Hc'j JYk 'U'FYj JYk '@|b_YX': J'Y'< Jhg'fYdcfh

1. In the **GYUfW** field, type in a search term and click the **: i ``HYI h'GYUfW** button.
2. In the **GYUfW 'FYgi `hg** pane, click the **FYj JYk '@|b_YX': J'Y'< Jhg** link in the **FYgci fW** 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 19(f)19(i)24(l): 19(f)19(i)24(l)24(e)- is automatically opened in DocManager.

Notic24(e)- that your search query displays at th24(e)- bottom of th24(e)- Linked D

3. Navigat24(e)- the search hits by clicking **BYlh'< Jh** or **DfYj Jci g'< Jh** buttons.

Search hits display highlighted in blue with the current hit highlighted in yellow.

4. Click on the **BYI h'8cW**  or **DfYj Jci g'8cWa Ybh**  buttons to view files in report.

You can also double-click on a 19(f)19(i)24(l)24(e)- in the pane to open it in the DocManag

5. When you are 19(f)19(i)nished click thto close the DocManager window.

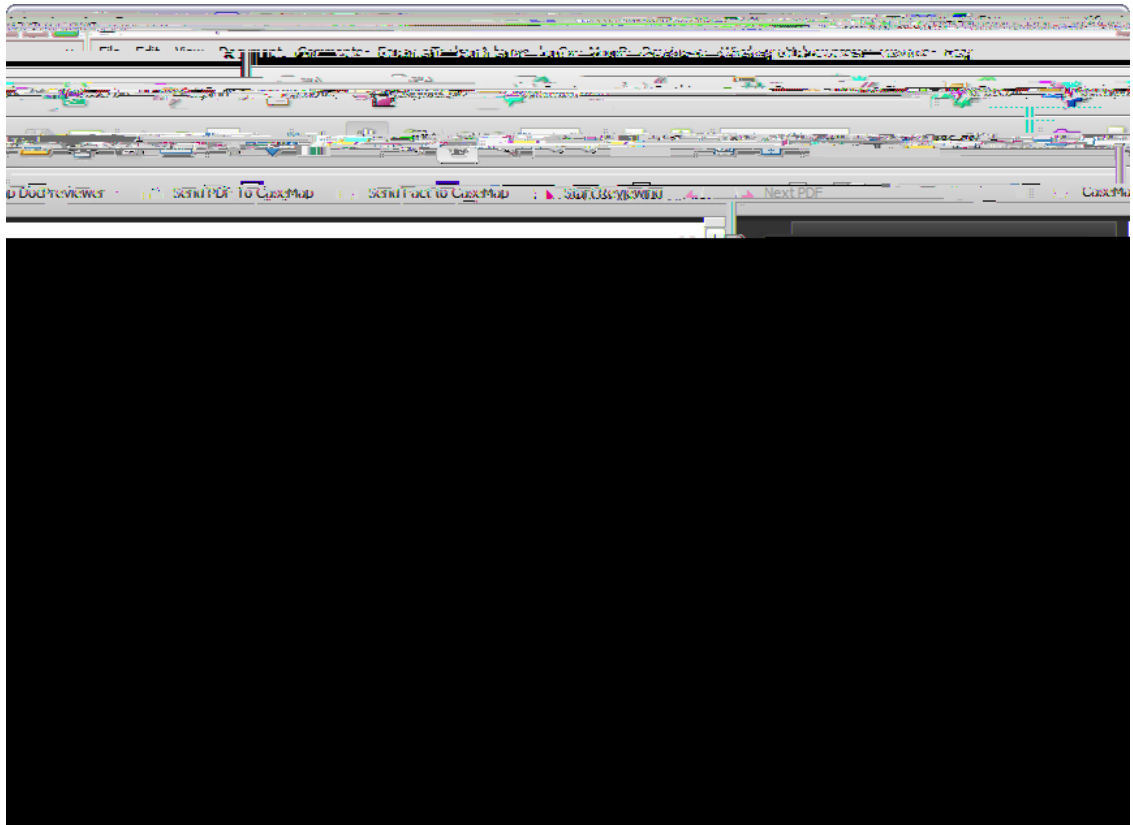
[Related Topics](#)




Documents are sorted by file name.

7. Clear the check box next to any document or .,23(o).

Cly d o anysotnysnte che



11. Click on the  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 **C?** or **5`ck** .
The document or file opens in a new window and in its native file application.
15. In the lower left corner of Acrobat or Reader, click on the paperclip icon.
An attachments pane displays in the bottom of the window.
16. In the

icons display next to spreadsheet records.

5. In the **8cW/a Ybly'hc'9a VYX]b'FYdcfh** dialog box, review the list of documents linked to the current spreadsheet's records.

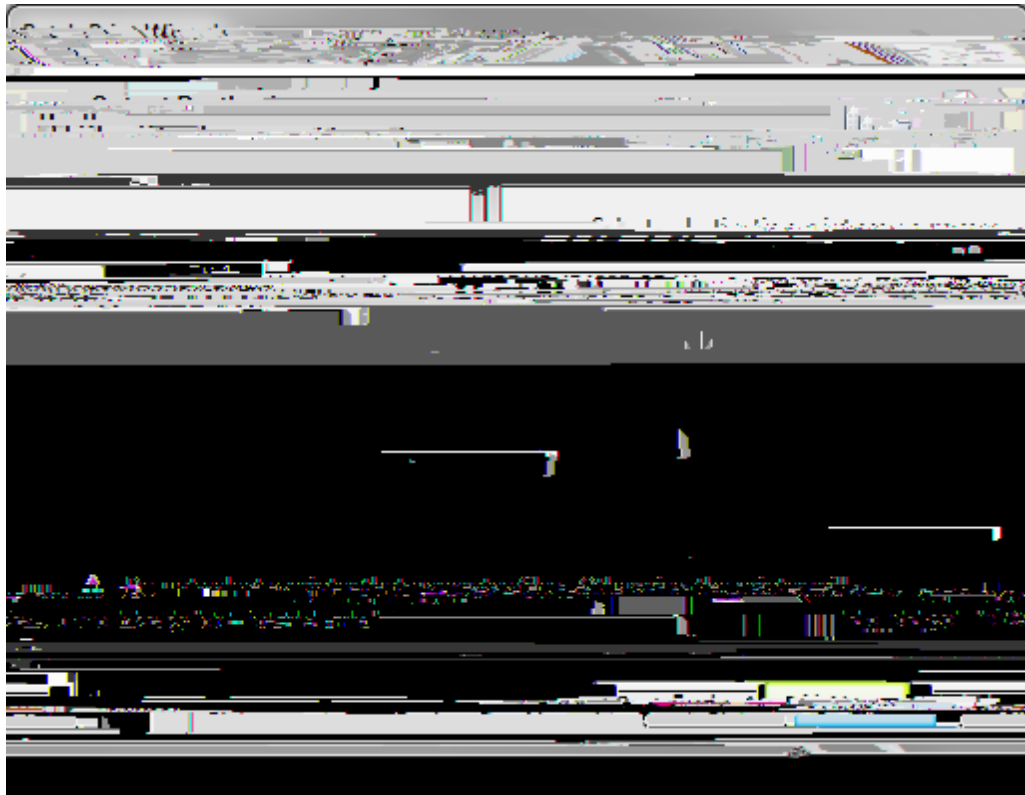


Documents are sorted by file name.

6. Clear the check box next to any document or file you want to remove from the list.
7. Click **C?** to continue.

A message nue.5. In -5234(t)Td [(Ap)-71(c)21(k71()19(s)-4(u>3l)24(e19()2499()1 [(5).

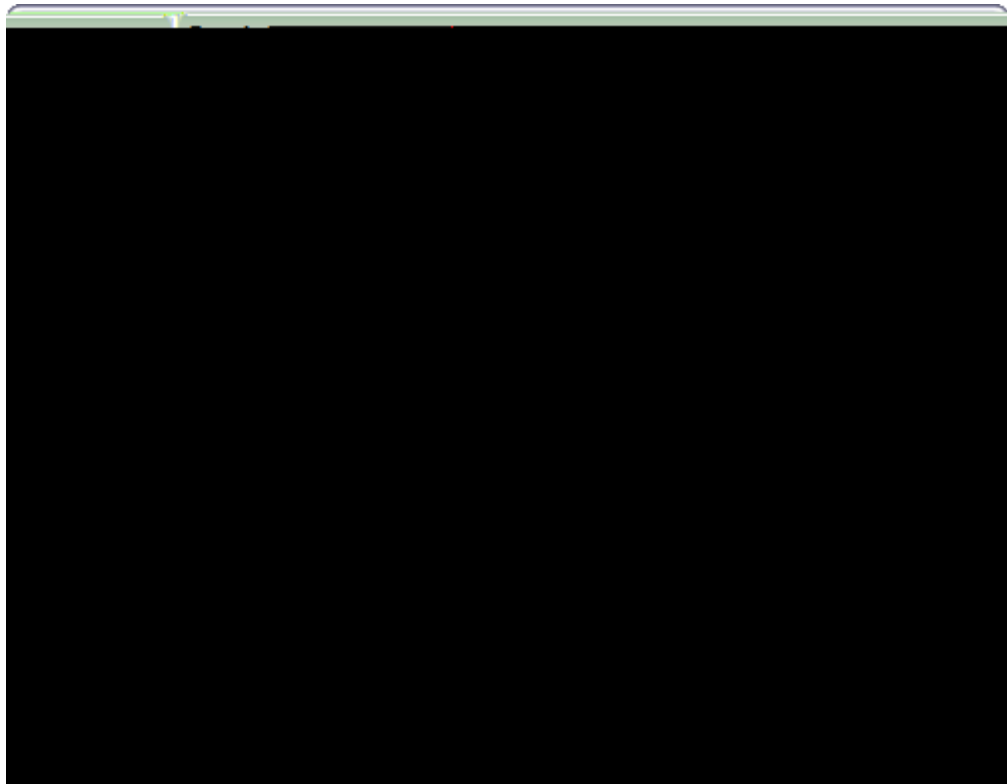
11. In the **DFYZI** field, type in a prefix (optional).

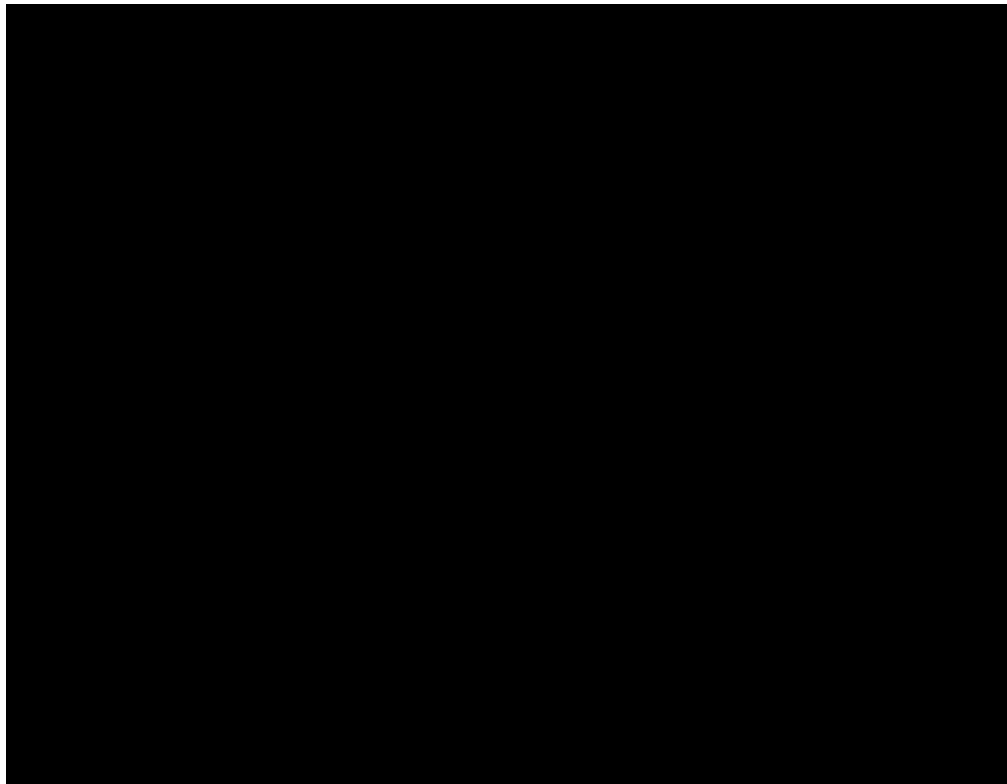


Do not select a printer that generates files. Otherwise, the printer will prompt you to save a file for every document printed.

23. Click **BYI h**







6. Click **BYI h**to continue.

26. Click the link **7`JW`YfY`tc`cdYb`h.Y`ci`hdi`hZc`XYf** to review the printed output.

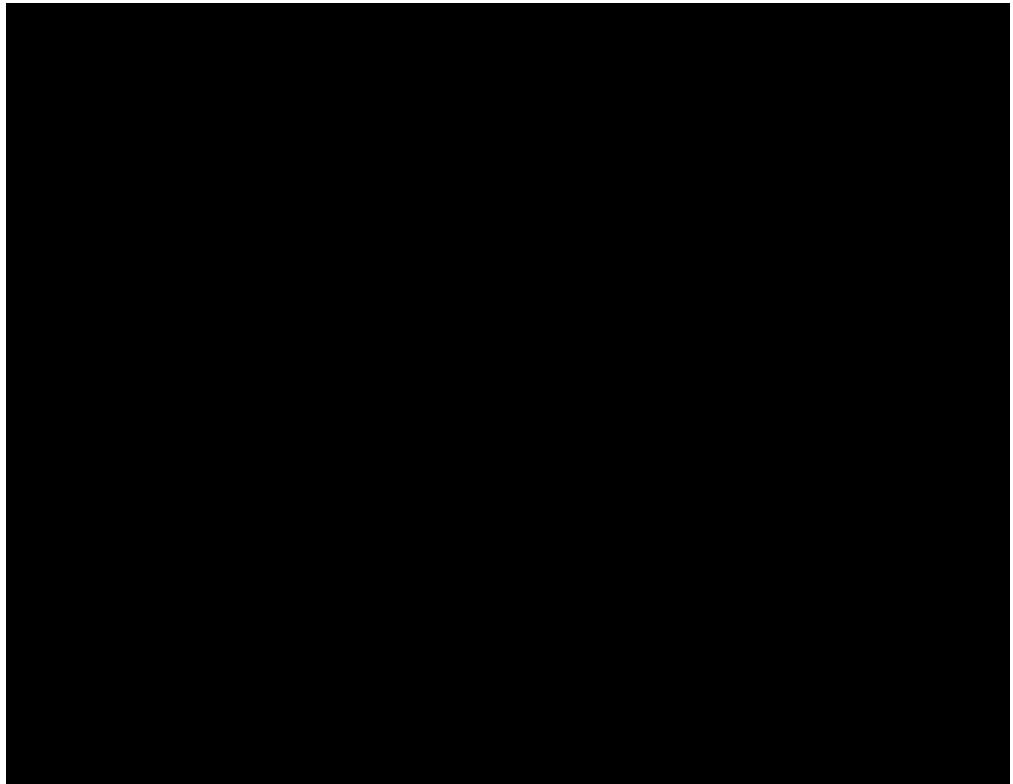
27. Click : **]b]g** to close the wizard.

] Hc`VUHW`df]bhK`Hk` :

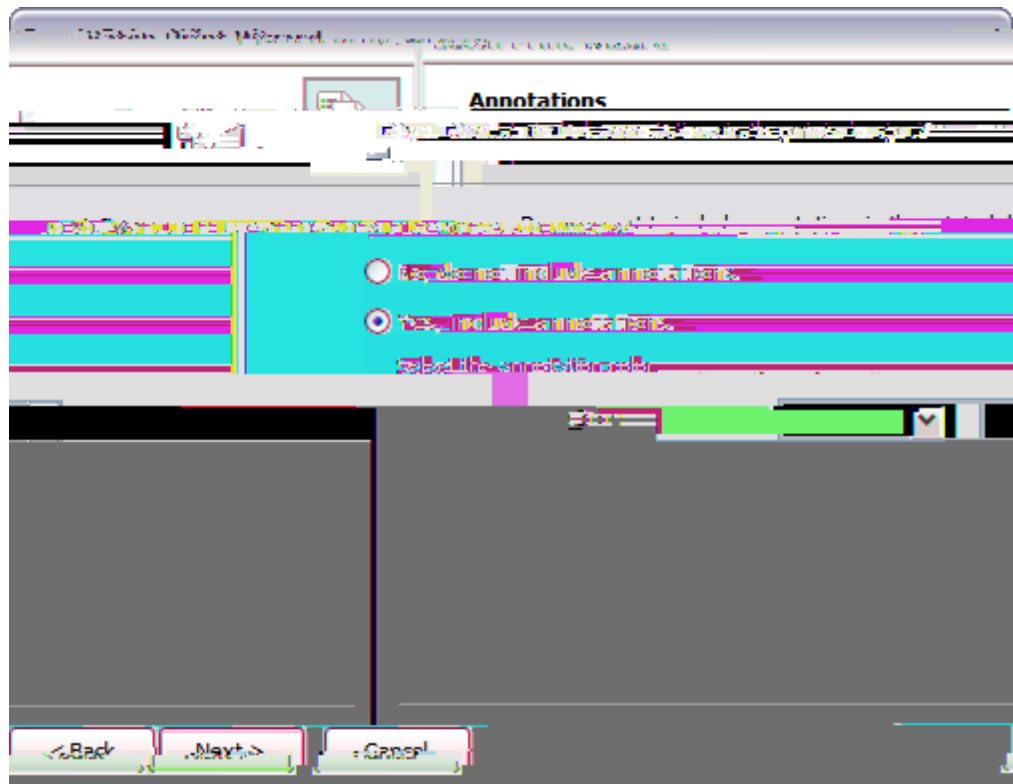
1. On the **FYdcfhg** menu, select **6UWV`Df]bhK`]nUfX**.
2. On the submenu menu, click **Hc`Hk` :**.
3. When the **6UWV`Df]bhK`]nUfX** launches, click **BYI`h#**. In the **FYj`JYk`'8cWa`Ybtrg**

25. Click the link [7 JW \YfY hc'cdYb'h.Y'ci hdi hZc`XYf](#) to review the printed output.

26. Click : [b\]g\](#) to close the wiza6T /T.1 r63 12 Tf 0157.75100.75 149.75 70-401 cm /I-941414

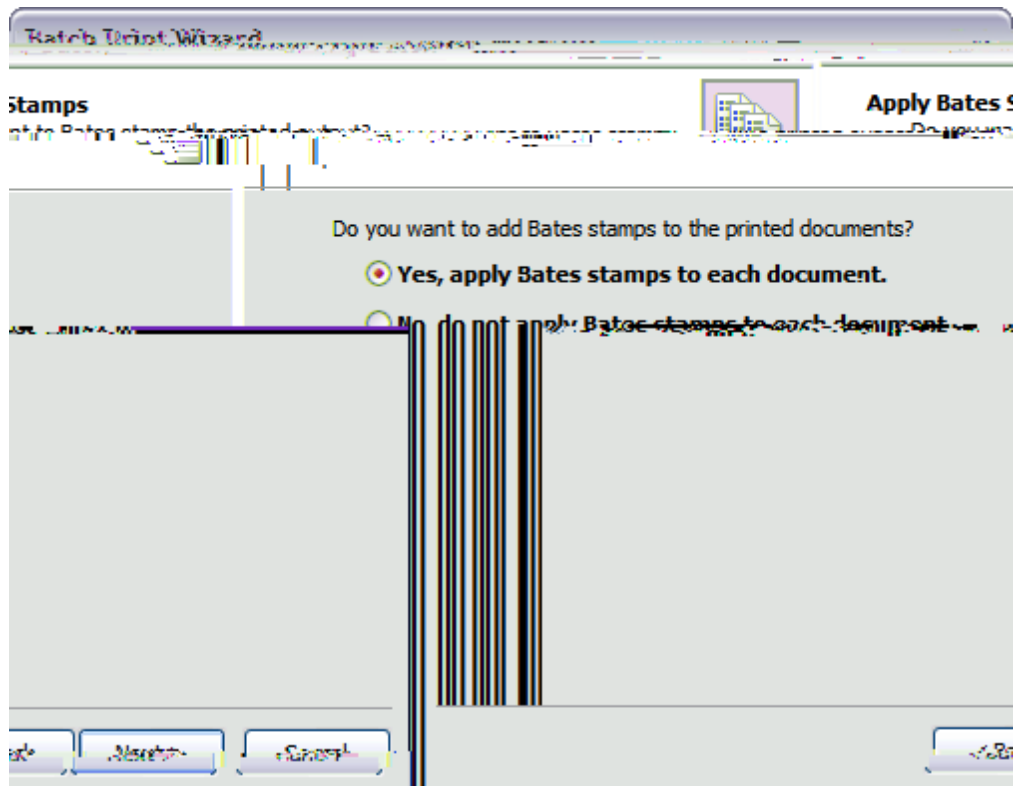


- e. Click **BYI h** to continue.
- f. In the **5bbchUjcbg** dialog box, select whether you want to print annotations, and then click **BYI h** to continue.



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

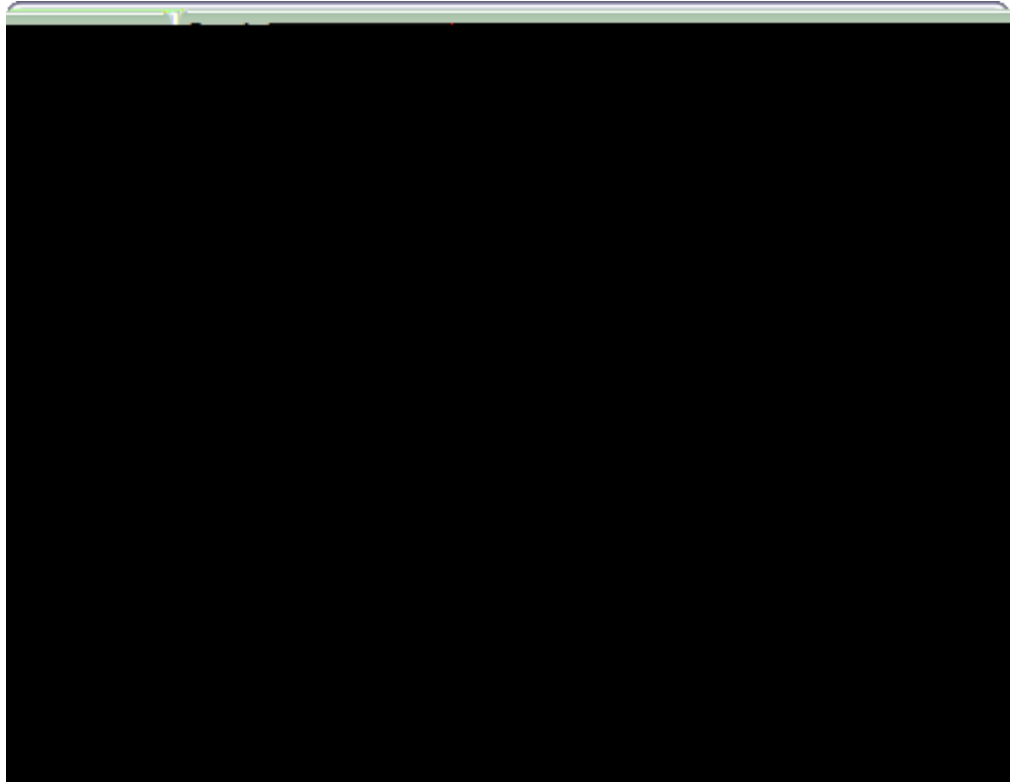
- g. In the **5dd'mi6UHg'GHUa d'**



- h. In the **Bates Stamp Wizard** dialog box, select your Bates stamp options.

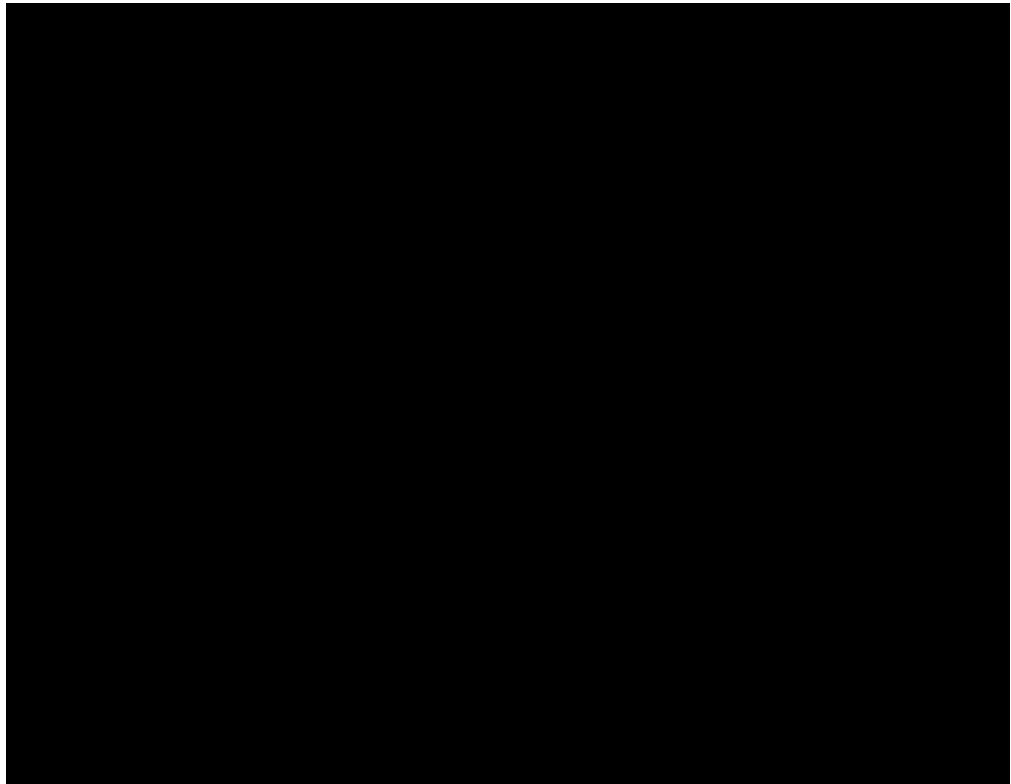


23. Click the link [7 JW \YfY'hc'cdYb'k.Y'ci hdi h'Zc'XYf](#)

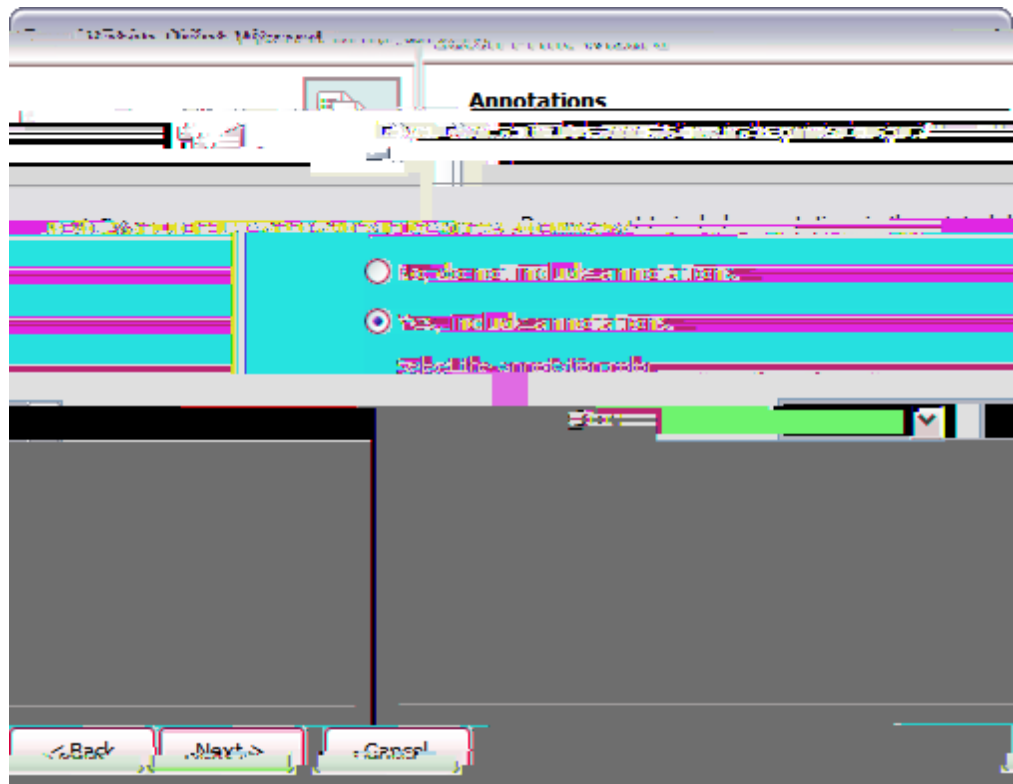


If you want to remove a document from batch, select the document in the Documents to print box, then click the Remove button.

- d. Click **BYI h** to continue.
- e. In the **8cW a Ybh7cbH/bh7c`cfg** dialog box, select a document content color option:
 -

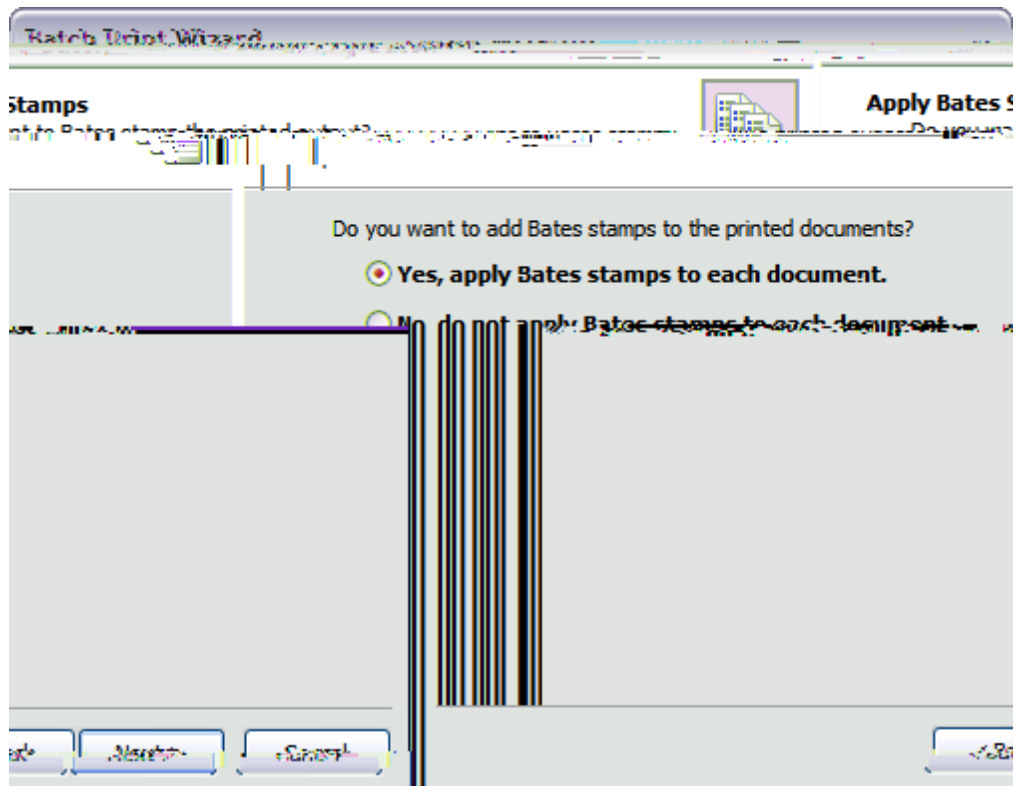


- f. Click **BYI h** to continue.
- g. In the **5bbchUjcbg** dialog box, select whether you want to print annotations, and then click **BYI h** to continue..



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

h. In the



th In 6UH'GHU d' C d' 19(s)-62lect3019(y)9(o)-60(u)-3U 8 Bates

25. Click the link [7 JW \ YfY hc cdYb h Y ci hdi hZc XYf](#) to review the printed output.

26. Click : [Jb\]g\](#) to close the wizard.

[Related Topics](#)

6YbYZ]hg'cZl g]b['FYdcfh6cc_g

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



For more information, see [Printing pre-built ReportBooks](#), [Importing the Intake Interview Form](#).

■ [5X'i gh'gdfYUXg\YYhj \]Yk g'VYZcfY'WYUhb\[#df\]bh\]b\['FYdcfh6cc_g](#)

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.

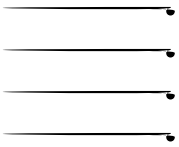
For more information, see [Creating custom ReportBooks](#).

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

[Embedding linked documents in reports](#)

[Exporting/importing ReportBooks](#)

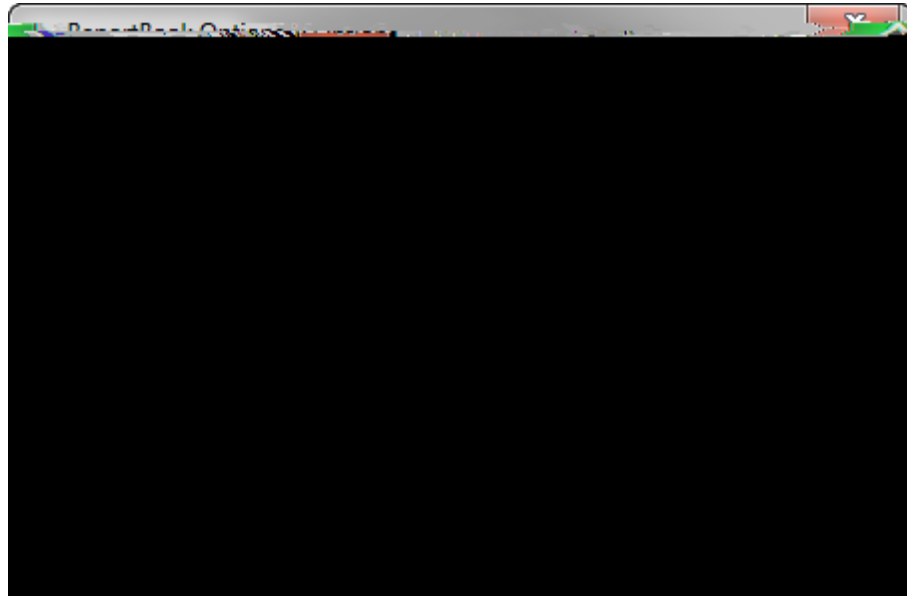
reating custom R[-28(e)-6(p)-14(o)-14(r)14(t)21(B[-28(o)-14(o)-14(k)-6(s)]TJ /TT2 12 Tf 0 -33



pages.

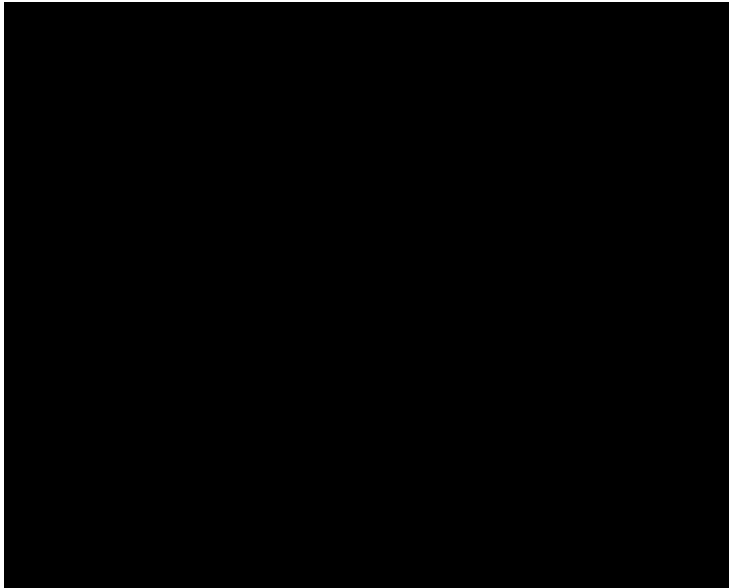
5. Click the **DfYj JYk** button to review chTJ -24>0(e)-71(v)9(i)24(e)-71(w)-99()19(c)21(t

6. Click the **DFYj JYk** button to review your changes.
 7. Click **C?** to save the changes.
7. Hc'a cX]ZmiH.Y]bhf cXi W]cb
1. In the **7i grca]nY`FYdcfh6cc_** dialog box, click the **=bhf cXi W]cb** button.
 2. In the **9X]hFYdcfh6cc_`=bhf cXi W]cb** dialog box, click the **9X]h7cbHbh** button.
 3. In the **9X]hFYdcfh6cc_`=bhf cXi W]cb`7cbHbh** window, modify text as well as font size and style, symbols, and fields using the toolbar buttons.
 4. Click **C?** to save the changes.
 5. In the **9X]hFYdcfh6cc_`=bhf cXi W]cb** dialog box, modify additional preferences in the **GYH]b[g** area that you want applied to the introduction page.





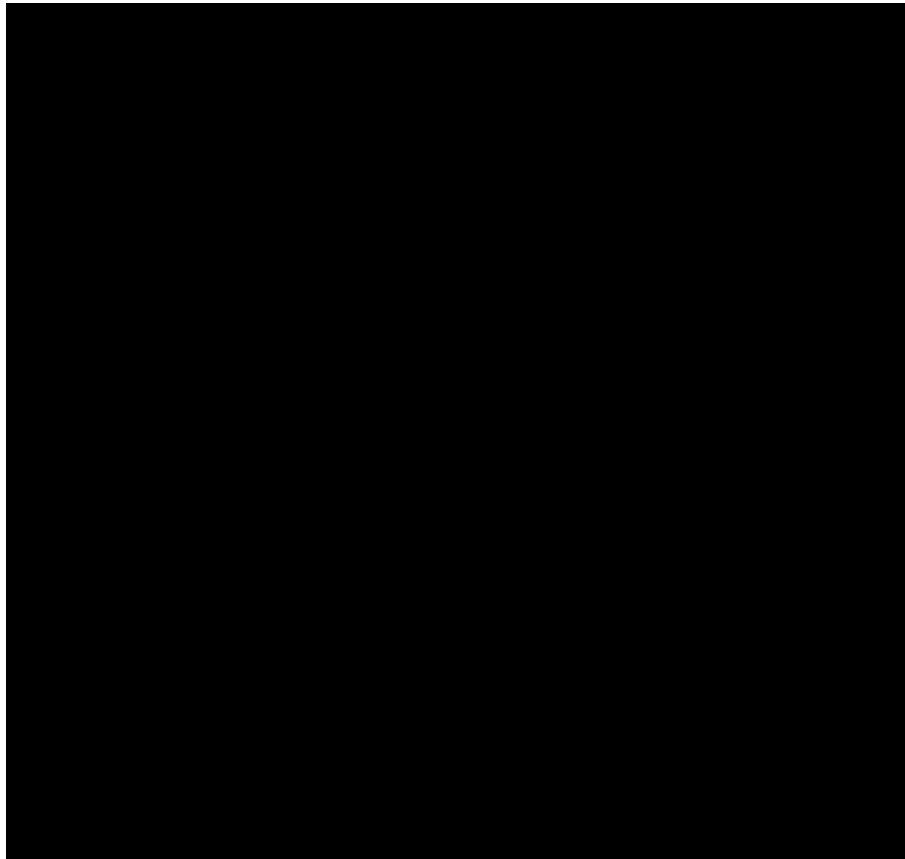




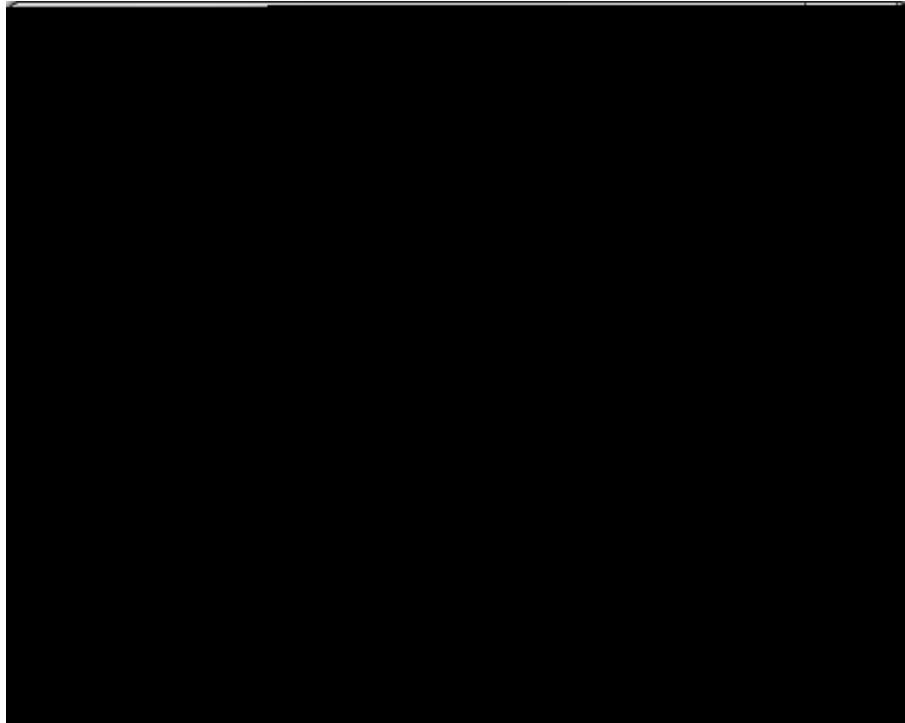
10. Select **C dYb`7i ghca JnY FYdcfh`** after the rep bSP03•9qND0E6\$) 19(\$)-S3(e)-78(r) 10(\$)IP0t



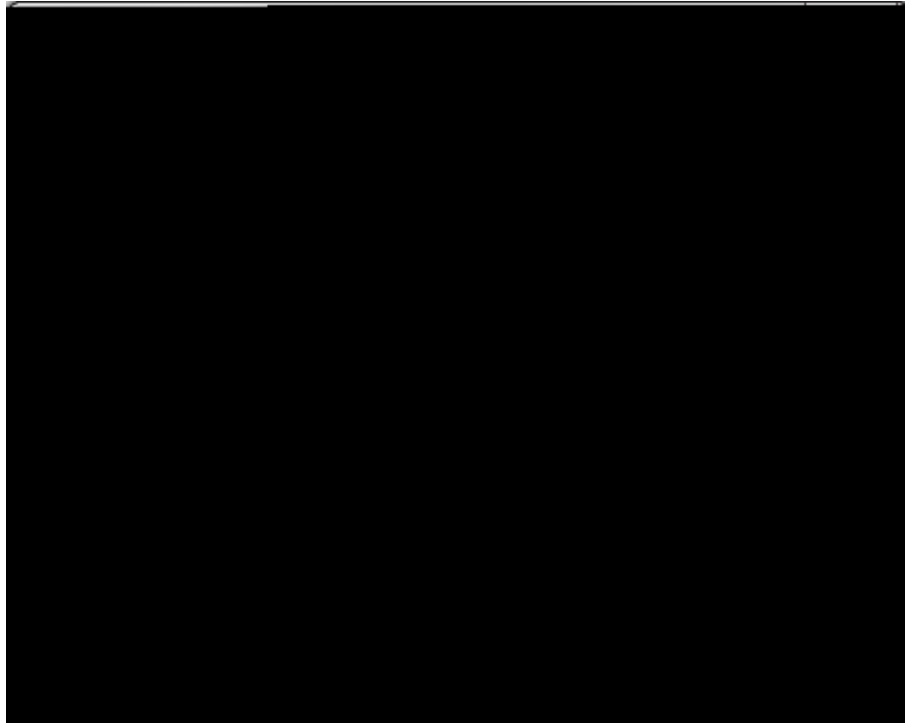
- Click the **7i ffYbh: JHf**



- If you select ; **fci d`VmCV^VM**

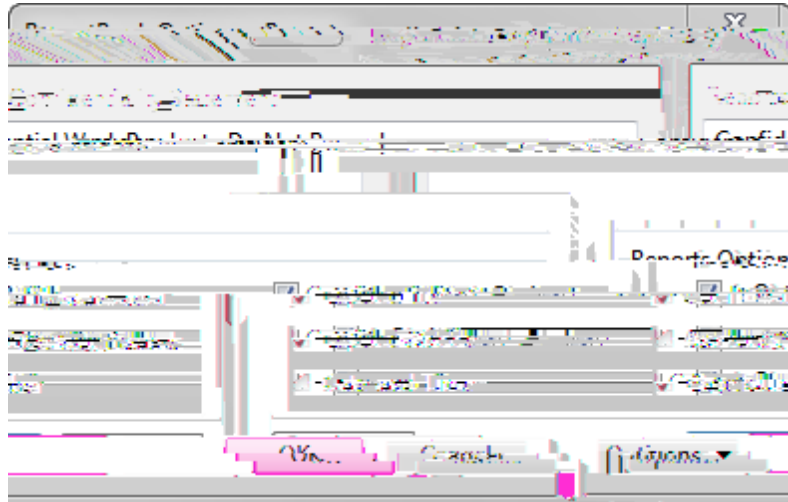


ing CaseMap 595

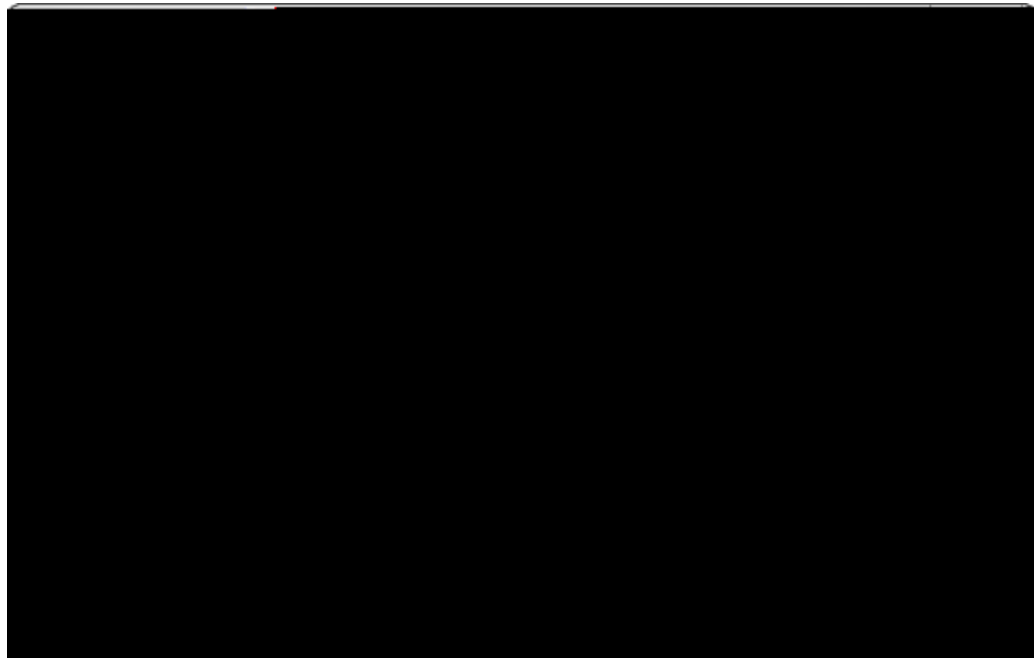


3. In the **9X]hFYdcfh6cc_`=bfCXi W]cb** dialog box, click the **9X]h7cbHbh** button.
4. In the **9X]hFYdcfh6cc_`=bfCXi W]cb`7cbHbh** window, modify text as well as font size and style, symbols, and fields using the toolbar buttons.
5. Click **C?**





6. Click **C?** to save the changes.
7. Click the **FYdcfhH]hY'DU[Yg**



Documents are sorted by file name.

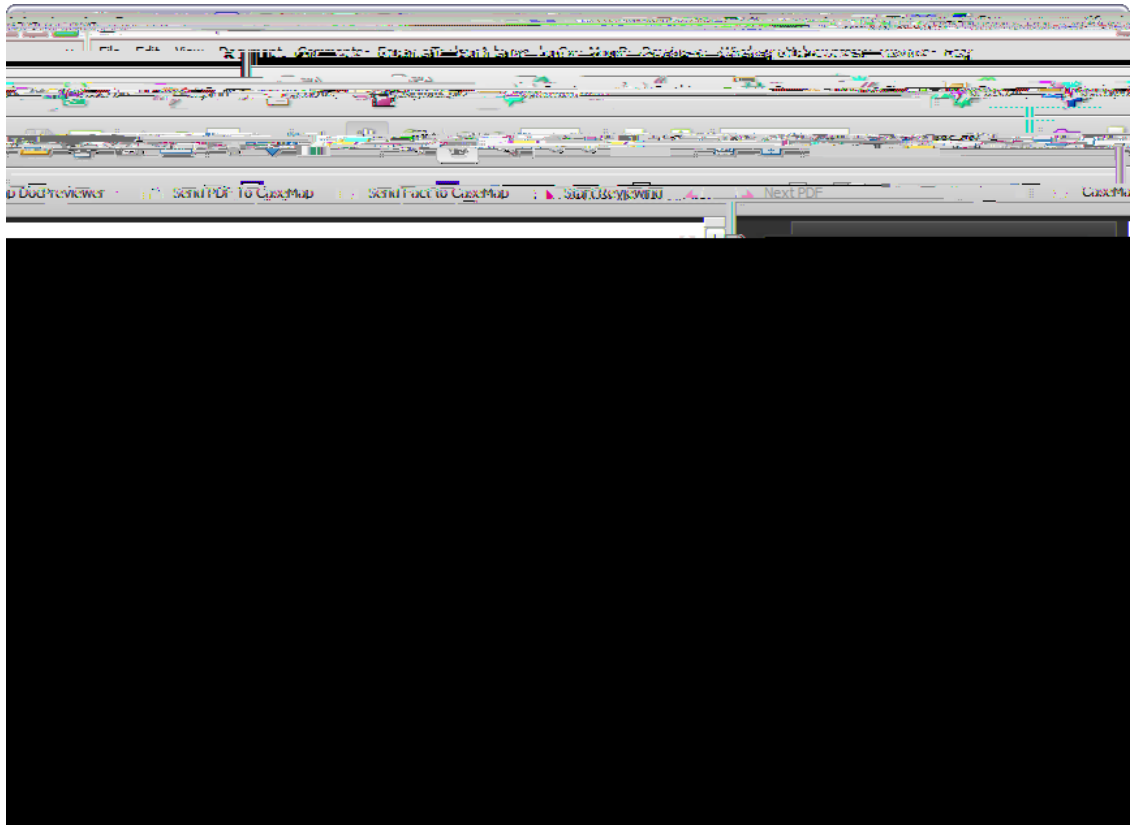
7. Clear the check box next to any document or file you want to remove from the list.
8. Click **C?** to continue.




[About creating ReportBooks](#)

[Creating custom ReportBooks](#)

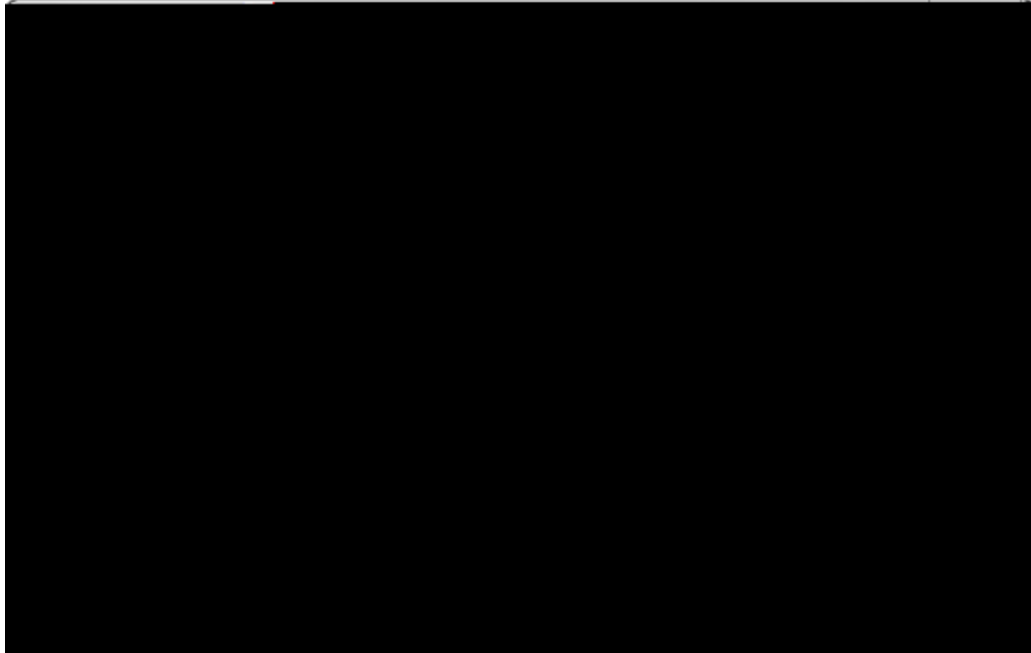




11. Click on the  icon next to a spreadsheet record to open the linked document.

icons display next to spreadsheet records.

5. In the **8cW/a Ybhg'hc'9a VYX'jb'FYdcfh** dialog box, review the list of documents linked to the current spreadsheet's records.



Documents are sorted by file name.

6. Clear the check box next to any document or file you want to remove from the list.
7. Click **C?** to continue.

A message displays if the total file size exceeds 5 MB, allowing you the option to remove some files before printing.

8. In the message box asking to view the file now, click **Mfg**.
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 **dUdYfWjd** 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 19(i)24(l)2e, click **5`ck**.

The document or file opens in a new window and in 4(l)2ts native source file application.

12. Click the **dUdYfWjd** icon in the lower, left corner of Adobe Acrobat or Reader.

Related Topics

ExMort File Format Options



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.

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

- **8Y`ja]hX'hYI hZ]Yg**— 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

4. In the **GUj Y Ug'hdY** field, click on the file type you want to use.
5. Click **GUj Y** to cond [<005 113.25 689 113.25 689 113.25 689 113.89969(C)-52(634()19(t)

8cWa Ybhg) to open it.

3. In the **CV^Wg!** **8cWa Ybhg**



[Applicaion keyboad sortcuts](#)

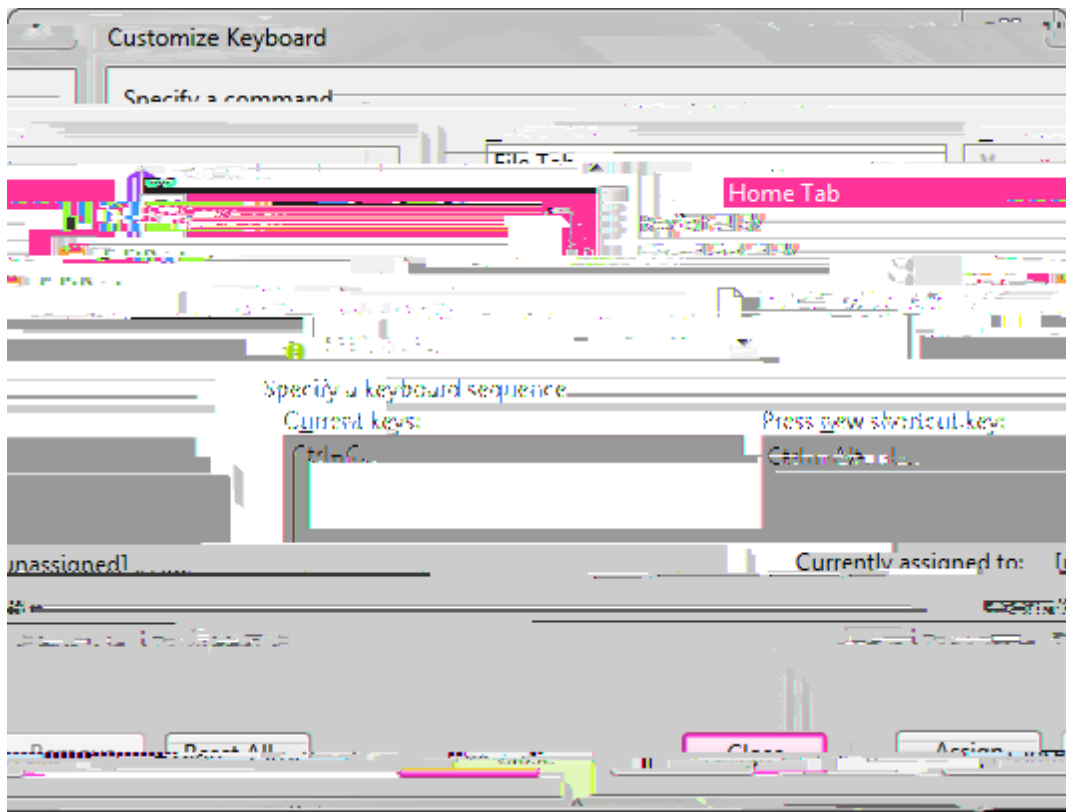
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3. In the **7i ffYbh_Ymg**

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