Release Notes

CaseMap®, Version 12.1

- **Enhancements**
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LexisNexis®

CaseMap Release Notes

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

Version: CaseMap® 12.1
Release Date: January 30, 2017

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CaseMap v12.1

Enhancements

12.1 Build 105

The following enhancement has been added to CaseMap version 12.1 (Build 105), released May 23, 2016:

⊟ **Optimized redactions**

Optimized to reduce the time it takes to create a large number of redactions within a document.

12.1 Build 098

The following enhancements have been added to CaseMap version 12.1 (Build 098), released February 29, 2016:

⊟ **SmartAssist**

SmartAssist aids in performing various tasks in CaseMap by providing you with keyword search capabilities in locating user-driven functions.

⊟ **Import Email attachments as separate objects**

When using the Microsoft® Outlook plug-in to send an email to CaseMap, now you can import attachments as separate objects. Additional enhancements/capabilities include:

▼ **Bulk send emails to CaseMap**

You can now send emails to CaseMap in bulk from Outlook. Each email is created as a separated object record.

▼ **Creating a new object for the extracted attachment(s)**

When using the Outlook plug-in to extract an attachment from an email, attachments are extracted in their native format to a user-specified folder and linked to CaseMap as new object records. The records are added as Document object records and identified by the file name of the attachment.

▼ **Linking Email objects to the Documents spreadsheet**

A new 'Link attachments as separate records' check box has been added to the 'Send Email to CaseMap' dialog box. When selected, all attachments/objects are added to the Documents spreadsheet in CaseMap. If the check box remains unchecked, then any of the CaseMap spreadsheets can be selected.

▼ **Linking attachment(s) to parent email**

When email attachments are extracted and linked to CaseMap, the parent/child relationship is maintained. Attachment records are linked to the parent email via the "Attachment(s)" field on the Documents spreadsheet.

Find and redact text on a document

Now in CaseMap you can search and find words or phrases to be redacted. Additional enhancements/capabilities include:

Create redaction(s) using 'Find and Redact'

A new button has been added to the DocManager Home tab for utilizing the 'Find and Redact' feature.

Finding and redacting words or phrases

New search capabilities have been added to CaseMap that allows you to locate words and/or phrases in a document to be redacted.

Redacting personal privacy information

CaseMap provides you with the ability to redact common/personal privacy information such as social security numbers, date of birth, phone numbers, etc.

Redaction confirmation display

A dialog box is now displayed in CaseMap to confirm the total number of redactions when the Find & Redact function is used to create redactions.

Code object metadata when importing linked files

Now you can import files into CaseMap based on who provided them to you, thus enabling you in simplifying the document review and production workflow processes by means of:

Populating and selecting object spreadsheet fields

A new screen, to include additional check boxes has been added to the Import Linked Files Wizard that allows you select and populate specified fields within a CaseMap spreadsheet.

Specify a source when importing documents

Now when importing files into CaseMap, you will be prompted whether or not to enter a document source. By selecting Yes, you will be able to code a source for the documents being imported.

Select destination field and specify coding values

The Import Linked File Wizard now allows you to display and select destination fields for coding source information as well as marking documents for review.

Double-click to open linked files

In addition to clicking on the linked file indicator (paperclip icon) to view the directory path of the native file, and the type of file that is linked to a record in CaseMap, now you can double-click on the paperclip icon to open the file(s) and/or research linked documents.

Produce documents to TIFF

A new 'TIFF Image' option has been added to the Document Production wizard that allows you to produce and save documents in the TIFF Image format.

⊟ **Produce documents rendered in grayscale**

Now in CaseMap you can convert all document content colors to grayscale.

⊟ **Endorse additional information on produced document**

CaseMap now allows you to include additional information such as statements of confidentiality on a document. You can also specify the location of the added information in the header or footer of the document.

Additional functionality includes the ability to:

▼ **Add header and footer content to produced documents**

A new screen has been added to the Document Production wizard that allows you to add new header and footer content to produced documents.

▼ **Apply header and footer content to documents**

With the addition of the new header and footer content screen being added to the Document Production wizard, you can now add the header and/or footer information to all documents being produced or to specific documents produced by using the 'Saved Filters' criteria.

12.0 Build 124

The following enhancements have been added to CaseMap version 12.0 (Build 124), released September 22, 2015:

⊞ **Redaction capabilities**

⊟ **Create a new redaction**

CaseMap now provides you with Redaction tools (accessed from CaseMap DocManager) that allows you to hide/black out confidential information [words, sentences, paragraphs/ area of text, or an image(s)] in a document. The Redaction tools are located on the Home ribbon of the DocManager and consists of the 'Redact' and 'Select Redactions' buttons.

⊟ **Select/specify text to redact**

To restrict and/or hide confidential information [words, sentences, paragraphs/area of text, or an image(s)] within production documents, CaseMap now allows you to select the document text or area of a document to redact.

⊟ **Specify a redaction reason and saving redaction**

CaseMap now allows you to specify a reason why selected text is being redacted within a document. Once a redaction reason has been specified and deemed OK, CaseMap saves the information and content.

⊟ **Edit a redaction reason**

Once a redaction reason has been entered, CaseMap now allows you to edit and change the reason where applicable.

Edit a redaction selection

CaseMap now allows you to change/edit a selected redaction by adjusting (expanding/contracting) the area of text that's selected in a document.

View the redaction reason when hovering over the redacted text

When the 'Select Text' option is selected and you place the mouse over (hover) redacted text in a document, CaseMap now allows you to see what reason was specified for redacting the content.

Remove an individual redaction

CaseMap now allows you to remove an individual redaction and restore the original text within a document such that it is seen as unmarked.

Document review and coding capabilities

Now in CaseMap when you click the Detail button while viewing a document in the DocManager viewer window, a Document Coding Sidebar displays on the right side of the DocManager window. The Document Coding Sidebar allows you to view document details and coding data (metadata) simultaneously while in the viewer and it also provides you with the ability to edit and/or change coding parameters for documents. In addition to allowing you to customize and adjust the coding fields displayed, you can also set the field sort order using drag and drop functions, and you can modify the selected view by hiding, displaying, and/or moving fields up or down inside the sidebar to change the display order.

Document production wizard

CaseMap now provides you with the Document Production wizard which enables you to create documents that can be shared in legal proceedings. The wizard provides you with the ability to review and choose the documents to be included in the production, apply Bates stamping, to adjust the order of the documents to be Bates stamped, and the ability to select file naming conventions, output formats and the destination.

Enhanced Embedded PDF Reporting - Include Redactions

When generating an embedded file PDF report, CaseMap now prompts you if a document contains redacted content. This provides you with an option allowing you to determine whether to include the redacted or a clean copy of the linked documents (no redactions) within a spreadsheet.

Resolved Issues

12.1 Build 106

The following resolved issue(s) has been added to CaseMap version 12.1 (Build 106), released January 30, 2017:

Microsoft SQL Native Client update.

CaseMap 12.1 includes SQL Native Client v.11 due to end of support for SQL Native Client version 9.

⊟_**Removed MSXML4 from CaseMap installer.**

Removed MSXML4 support in CaseMap due to end of support for MSXML version 4.

12.1 Build 105

The following resolved issue(s) has been added to CaseMap version 12.1 (Build 105), released May 23, 2016:

⊟_**Microsoft Office 2016 incompatibility**

Resolved an issue where CaseMap 12.1 was not compatible with Microsoft® Office 2016.

⊟_**Error displayed during CaseMap 12.1 installation**

Resolved an issue where an error was displayed during the installation of CaseMap 12.1, when Microsoft® Outlook 2016 was installed on the same machine.

⊟_**User not taken to the previous page in DocManager**

Resolved an issue where entering an invalid page number in DocManager does not display the last page in the document.

⊟_**Error displayed when printing redacted documents**

Resolved an issue where an error was displayed when printing documents with redactions.

⊟_**Invalid signature warning**

Resolved an issue where an error was displayed when downloading CaseMap 12.1 with Internet Explorer/Microsoft® Edge.

⊟_**Find and Redact is incomplete**

Resolved an issue where Find and Redact does not redact all instances of a word in a multipage document.

12.1 Build 098

The following resolved issue(s) has been added to CaseMap version 12.1 (Build 100), released March 04, 2016:

⊟_**SmartAssist throws an error when searching SQL related tasks**

Resolved an issue where SmartAssist was displaying an error when searching SQL related tasks in the non-SQL mode.

⊟_**The 'Send Email to CaseMap' context menu button is not available in Outlook 2013**

Resolved an issue where the 'Send Email to CaseMap' context menu button was not being displayed in Outlook 2013 when multiple emails were selected.

☐ **CaseMap 'change linked file path' utiliy not seeing mapped drives**

Resolved an issue where the CaseMap 'Change Linked File Path' utility was not seeing mapped drives.

12.0 Build 202

The following resolved issue(s) has been added to CaseMap version 12.0 (Build 202), released October 22, 2015:

☐ **Exception error displayed when attempting to rapidly open object linked files**

Resolved an issue where CaseMap would crash when attempting to open multiple documents in rapid succession.

☐ **Description field type line height increases in coding sidebar when opening a document**

When description field line height was increased beyond 2 lines, this setting would increase on subsequent attempt to open a linked file.

☐ **The CaseMap 12 repair function references CaseMap 11**

Resolved an issue where in certain environments repairing CaseMap 12 would reference a CaseMap 11 that was installed.

☐ **Cannot create privilege value containing more than 35 characters in a SQL case created from a template**

Resolved an issue when creating privilege field during replica creation.

Known Issues

12.1 Build 098

The following items are known issues in CaseMap version 12.1 (Build 098), released February 29, 2016:

☐ **Microsoft Office 2016 incompatibility**

CaseMap 12.1 is incompatible with Microsoft® Office 2016.

☐ **Error displayed during CaseMap 12.1 installation**

An error is displayed during the installation of CaseMap 12.1 when Microsoft® Outlook 2016 is installed on the same machine.

⊟ **User not taken to the previous page in DocManager**

Resolved an issue where entering an invalid page number in DocManager does not display the

last page in the document.

12.0 Build 124

The following items are known issues in CaseMap version 12.0 (Build 124), released September 22, 2015:

⊞ **Bates stamps applied using DocPreviewer are not removed for Image-Only PDF files**

Bates stamps that were previously applied using DocPreviewer are not being removed and replaced with the Bates number applied using the Document Production Wizard for Image Only PDF files.

⊞ **Areas where color and text overlaps are not visible when printing documents in the color black**

When the 'Display text in the document in black' option on the Output Format screen of the Document Production Wizard is used as an output selection, areas in the document/PDF where text and color overlaps are not visible and appears as a solid black area/space when printing/ viewing the document.

⊞ **Image-based PDFs with text where color and text overlaps generates white space with no content**

When the 'Image-based PDF with OCR text file' option on the Output Format screen of the Document Production Wizard is used to create a PDF, areas where text and color overlaps appears as white space with no displayed content.

Previous Version Releases

CaseMap v11.0

Enhancements

11.1 Build 031

The following enhancements have been added to CaseMap version 11.1 (Build 031), released May 27, 2015:

⊟ **Access to a new 'How To' Video Library has been added to the Getting Started & Help Info tabs**

CaseMap now provides access to a set of 'How To' videos on how to perform basic/common tasks in CaseMap. These 'How To' videos are accessible from either the Getting Started or the Help & Info tabs located on the File ribbon.

Display the Getting Started page after a case has been closed

When a case is closed in CaseMap, the Getting Started page now displays so that other actions such as creating a new case or opening an existing case can be performed.

Option to select the integrated research platform

CaseMap now allow users to select their research platform (Lexis.com or Lexis Advance®) based on their user preferences.

Lexis Advance - Get document functionality

CaseMap now directs you to Lexis Advance® when retrieving linked research articles using the 'Get this document' function located in the Research - Authorities spreadsheet.

Lexis Advance - Shepardize Citation functionality

CaseMap now directs you to Lexis Advance® when a Shepard's® report for linked research is run using the 'Shepardize' function located in the Research - Authorities spreadsheet.

Lexis Advance - Search Dockets & Documents

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.

Lexis Advance - Configure Shepard's Alerts

CaseMap now sets up Shepard's Alerts in Lexis Advance® when updates/changes are implemented in case law linked to CaseMap.

11.0 Build 131

The following enhancements have been added to CaseMap version 11.0 (Build 131) released January 08, 2015:

New user interface

CaseMap now has a new user interface that gives you easier access to the tools you need to perform your most commonly used tasks. As part of the user interface:

- customizable **ribbons** now replaces the Standard Toolbar used in earlier versions of the application. The ribbons are located at the top of the workspace, and each ribbon (Home, Reports, Case Tools, View) consists of tabs and/or menu items used in performing the most commonly used spreadsheet tasks and/or functions.

  Additional ribbons (Outline, Linked Authority Tools, and DocManager) are displayed when tasks utilizing their spreadsheet's functions are in required/in use.

- a **Quick Access Toolbar** has been added which allows you to place your most commonly used commands and spreadsheet tasks within easy reach. The Quick Access Toolbar is located above the ribbons by default, but it can be moved below the ribbon.
- a new **Getting Started Page** which is accessed when CaseMap opens, or by clicking the File tab once the application is in use. The Getting Started Page provides you with access to features such as importing/exporting data, setting up a case, sending data to other applications (e.g., LexisNexis® TimeMap®), and more.

Product help and other information (Training, Support, product updates, example cases, etc.), to include access to other application options and features is also accessed from the Getting Started page.

Resolved Issues

11.1 Build 032

The following resolved issue has been added to CaseMap version 11.1 (Build 032), released May 27, 2015:

⊟ **Exception error thrown when accessing Linked Summary fields**

CaseMap no longer displays an exception error when data from a Linked Summary field is viewed.

11.1 Build 031

The following resolved issue has been added to CaseMap version 11.1 (Build 031), released May 27, 2015:

⊟ **Lexis Research - Testimonial History Report**

When a Testimony History Report is run for an Expert Witness, a web browser instance is launched and it is now directed to the LexisNexis® Expert Research On-Demand site.

⊟ **Access violation error is displayed when changing row height**

Access violation errors are no longer generated when adjustments are made to the height of a row(s) in the Objects, Persons, and/or the Documents spreadsheets.

⊟ **The 'Send To CaseMap' feature is not functioning properly in Adobe Acrobat Reader DC**

After installing Adobe® Acrobat® Reader DC software, the 'Send To CaseMap' feature now works as expected, and warning messages are no longer generated.

⊟ **No scroll bar is available to view the complete contents in the New Filter section of the Advanced Filter pane**

A scroll bar is now available and can be used to view the complete/hidden contents located in the 'Filter Field/Area' of the New Filter | Saved Filters section of the Advanced Filter pane.

The Research button on the 'All Objects' spreadsheet displays the wrong label

When the 'All Objects' spreadsheet is selected, CaseMap now correctly displays the label 'Research' for the research button located in the Tools group of the Home ribbon.

Acrobat plug-in does not install for Acrobat DC versions

The CaseMap installer now detects instances of both the Full and Reader versions of the Acrobat DC software, and correctly installs the plug-in and DLL files to appropriate locations.

Unable to upgrade v3, v4, and v5.1 case files to a CaseMap 11 format

CaseMap now upgrades v3, v4, and v5.1 case files to a CaseMap 11 format, and error messages are no longer generated when the conversion is started.

The New Record button does not update immediately after renaming an active Object spreadsheet

Now when the name of an Objects spreadsheet (e.g., Other Physical Evidence) is changed, the new name is immediately applied and displayed in all appropriate locations.

11.0 Build 135

The following resolved issue has been added to CaseMap version 11.0 (Build 135), released April 08, 2015:

Cannot create a new case from a template

CaseMap now prompts/allows you to select a custom template when using the New Case Wizard to create new cases.

Current Issues

11.0 Build 131

The following items are current issues in CaseMap version 11.0 (Build 131) released January 08, 2015:

Resetting the Quick Access Toolbar to the default state does work as expected after customization

After customizing the Quick Access Toolbar with additional commands, the ability to reset the toolbar back to its original/default state may not work as expected. To restore all the toolbars back to their default state, exit the application and hold down the 'Shift' key when restarting the application.

Additional white space is displayed after groups are added to the Quick Access Toolbar

When adding a group to the Quick Access Toolbar using the right click menu for the group, additional white space is displayed in the Quick Access Toolbar instead of the icon.

⊟ Ribbons group icons are not displayed after resizing the CaseMap window

When resizing the application window to a very small size, the icons for the ribbon groups are not displayed.

⊟ The new spreadsheet name does not immediately display after renaming an object spreadsheet

When renaming an object spreadsheet, the new record icon label does not immediately display the new spreadsheet name. Selecting another spreadsheet and then returning to the renamed spreadsheet will display the correct icon label.

⊟ Unable to convert e-mails to PDF

Unable to convert e-mails to PDF may appear for certain e-mails where clients have migrated to Microsoft® Office 365.

⊟ The DocManager Status bar may not display the correct zoom percentage

The DocManager Status bar may not display the correct zoom percentage when returning to 100%.

CaseMap v10.0

Enhancements

10.2 Build 265

The following enhancements have been added to CaseMap version 10.2 (Build 265) released May 2, 2014:

⊟ Send documents to Sanction 3.5 or later as exhibits

CaseMap now allows you to send documents to Sanction 3.5 or later as exhibits. You can send one document at a time or send all of the document in the current spreadsheet.

10.1 Build 67

The following enhancements have been added to CaseMap version 10.1 (Build 67) released

December 4, 2012:

⊟ Use the Acrobat plug-in with Acrobat 11

CaseMap's Adobe® Acrobat plug-in now supports Acrobat version 11. All of the existing features work as they did with prior versions of Acrobat.

10.1 Build 63

The following enhancements have been added to CaseMap version 10.1 (Build 63) released June 18, 2012:

⊟ Store case data using Microsoft SQL Server

Leverage the performance of a Microsoft® SQL Server® database while still taking advantage of all of the great new features in CaseMap version 10. Coupled with an updated version of the CaseMap Server, administrators can create and manage SQL cases, as well as assign permissions for many of the new features.

⊟ Viewing linked files in the native application instead of DocManager

DocManager can now be configured so that files can be viewed in their native applications rather than automatically displaying in the DocManager file viewer. To automatically view linked files in the native application, click Tools, then click Options and then clear the Open Linked Files in DocManager check box.

⊟ Use the Search Link Assistant to simplify searches for object and issue names

The Search Link Assistant makes it even easier to search case data by automatically searching for links to objects and issues with names that match the search criteria. Take advantage of the benefits of using short names for linking without complicating your searches.

The Search Link Assistant is enabled by default, but you can turn it off from the Tools > Options > Searching tab if you want more precise control over what the search includes.

10.0 Build 233

The following enhancements have been added to CaseMap version 10.0 (Build 233) released February 24, 2012:

⊟ Improved performance when embedding linked files in a PDF report

CaseMap now only makes copies of linked files specifically selected to be included in the PDF report, rather than making copies of all files available to include.

10.0 Build 227

The following enhancements have been added to CaseMap version 10.0 (Build 227) released February 13, 2012:

⊟ View linked files in the DocManager near native viewer

CaseMap is integrated with the new DocManager near native image viewer. Use DocManager to review and annotate documents and images without having to open the source file in its native application. Annotations can also have searchable notes that edited later. Annotation notes display as search results findings when the notes match the search query.

When a search is run in CaseMap, search hits will be highlighted in DocManager allowing for easier content review and navigation between search hits. Once content is reviewed and annotated, the annotations and notes are automatically saved. When printing annotated files, there is an option for including annotations and notes when printing to PDF.

⊟ Benefit from OCR processing of linked files

CaseMap automatically performs OCR (optical character recognition) processing on linked image files and PDFs so that the text content can be indexed for full-text searching. CaseMap runs the OCR process in the background while staff continue working in the case file. The OCR process also makes it possible to select, copy, and annotate text in DocManager when viewing these linked files.

⊟ Use the new Import Linked Files Wizard to bulk import files

Use the new Import Linked Files Wizard to import one or more files into a spreadsheet at one time. CaseMap automatically creates new records for each file while linking to the source file saved in a network folder.

Use the wizard to import a folder of files, including files saved in subfolders. The Import Linked Files Wizard is the quickest and easiest method of populating a CaseMap case with multiple documents at one time.

⊟ Send facts from Microsoft Outlook emails

Use CaseMap's Outlook plug-in to send emails from Microsoft® Outlook 2007 and 2010 to a CaseMap v10+ case. In Outlook 2007, the Send to CaseMap features display on a CaseMap menu as a toolbar button and as a CaseMap ribbon. In Outlook 2010, it displays as a CaseMap ribbon. The Outlook plug-in is optional during CaseMap installation.

⊟ Send facts and documents from Microsoft Word

Send fact text and documents directly from Microsoft® Word 2007 and 2010 (32-bit versions). The Send to CaseMap features display on a CaseMap ribbon within Word. The Word plug-in is optional during CaseMap installation.

⊟ Create custom spreadsheets

CaseMap now provides the ability to create custom sub-object spreadsheets. New custom spreadsheets contain five default fields: Full Name, Short Name, Role In Case, Key, and # Facts. Additional fields can be added to the new spreadsheet as needed.

When a new spreadsheet is added, it can be used just like any other CaseMap spreadsheet. Data can be sent to it immediately using the Send to CaseMap tool. All reporting options are also available on new spreadsheets.

⊟ Learn about more spreadsheet features

CaseMap offers more customization options for spreadsheets than ever before, including the ability to:

- Rename many sub-object spreadsheets to best suit organizational needs.
- Delete spreadsheets from the Case Shortcuts pane.
- Change the spreadsheet display order in the Case Shortcuts pane.

⊟ Batch print linked files

CaseMap's DocManager add-in program includes a Batch Print Wizard that allows for printing documents linked to object spreadsheets, research spreadsheets (Authorities and Extracts from Authorities spreadsheets), and the Facts spreadsheet. Linked documents can be printed to a printer, or PDF or TIFF file. The wizard provides an option for removing any documents from the selected batch prior to printing.

If documents are annotated, the Batch Print Wizard includes an option to print to PDF with or without annotations and notes or burn the annotation as a permanent part of the content (without notes). The annotation color for printing annotations can be also be modified.

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

⊟ Print reports with embedded files

Reports and ReportBooks can now be printed with embedded files when printing to a PDF file. Reports with embedded links to attached files can now be shared with others who do not have access to CaseMap or the case.

CaseMap will only embed files that are in the Linked Files field in the object spreadsheets or the Authority and Extracts spreadsheet or Source(s) field for the Facts spreadsheet. During the print process, large documents or confidential documents can be removed.

Once the report is printed to PDF, spreadsheet records with linked documents or files will display a paperclip icon. Clicking the paperclip icon opens the linked document in a new window, in its native application.

⊟ Print search results from three different report options

The new Search Results pane contains three report options for printing search results: Search ReportBooks, Linked File Text Hits Report, and Review Linked File Hits. The latter two reports are offered as part the of the DocManager add-in program.

Search spreadsheets, linked file content, and annotations

CaseMap now offers full-text search capabilities for spreadsheet records and linked files. Full-text searching also includes the ability to search annotation notes, restrict searches to select spreadsheets, and re-run recent searches. Full-text searching in CaseMap supports many of the common search operators used to produce precise search results.

Search results display in a new Search Results navigation pane with a list of each spreadsheet that contains field text hits or linked files with search hits. The number of search hits returned for each spreadsheet also displays. Use the Narrow Results panel to view only those records that contain hits for spreadsheet fields, linked file text hits, or annotation note hits.

Selecting a spreadsheet in the Search Results navigation pane displays the records with hits from that spreadsheet. Linked files that contain search hits display a file icon that opens the linked file. Annotated records with notes that contain search hits display an icon in an Annotation Note Hit column. Annotated notes can be previewed in a pop-up window when a mouse pointer is placed over the icon.

Review general user-interface changes

- The Total Litigator pane was removed from the Navigation pane. Data from LexisNexis online tools can still be sent to CaseMap.
- The DocPreviewer pane was removed from the Navigation pane. DocPreviewer features still exist in CaseMap and can be accessed using menu options.
- The Search option on the Records menu now displays "Filter". CaseMap no longer uses "filtering" and "searching" interchangeably.

Resolved Issues

10.2 Build 266

The following resolved issue has been added to CaseMap version 10.2 (Build 266) released September 5, 2014:

Backup and Restore was not available

Backup and Restore is once again available in CaseMap. The functionality is the same as CaseMap 10.1 and earlier.

10.2 Build 265

The following resolved issue has been added to CaseMap version 10.2 (Build 265) released May 2, 2014:

⊟_Some of the links researching a person, organization, or issue did not work

CaseMap no longer includes the links that pointed to the decommissioned LexisNexis product Total Litigator.

10.1 Build 75

The following resolved issue has been added to CaseMap version 10.1 (Build 75) released August 9, 2013:

⊟_CaseMap would not index a case after updating the linked file for 40,000 or more records

Resolved an issue where updating the Linked File field for more than 40,000 records at once caused the indexer to crash. Rebuilding the index did not solve the problem. The indexer will now handle updating any number of records.

⊟_The E-mail to PDF Wizard did not convert some emails correctly on some systems

Resolved an issue where some of the PDF files showed parts of the email that were blacked out as if they had been redacted. This issue only occurred on systems where the current user registry settings for Internet Explorer (which is used in converting the emails) were overridden to use the machine-level settings.

10.1 Build 74

The following resolved issue has been added to CaseMap version 10.1 (Build 74) released June 14, 2013:

⊟_CaseMap may hang when closing a case during OCR processing

Resolved an issue where CaseMap would display a status dialog box and not close the case when attempting to close it while processing some documents for OCR. This issue only seemed to occur with some large PDF files.

10.1 Build 69

The following resolved issue has been added to CaseMap version 10.1 (Build 69) released March 28, 2013:

⊟ A delay occurred when using Acrobat 11 to open links created with the Acrobat plug-in

Resolved an issue where there was a delay of a few seconds when CaseMap tried to open a link created using the Acrobat plug-in using Adobe Acrobat 11 or Reader 11.

⊟ Links created with the Acrobat plug-in would not open in Adobe Reader 11 with Protected Mode enabled

Resolved an issue where links created with the Acrobat plug-in would not open in Adobe Reader 11 with Protected Mode enabled. The links opened as expected with Protected Mode disabled, as well as in prior versions of Adobe Reader.

10.1 Build 66

The following resolved issue has been added to CaseMap version 10.1 (Build 66) released July 13, 2012:

⊟ Images linked to Authorities or Extracts spreadsheets are not searchable without editing the records

Resolved an issue where CaseMap did not automatically index the text extracted from images linked to the Authorities or Extracts spreadsheets. CaseMap did not include these images in the search results unless the records were edited after the OCR text had been extracted, causing them to be re-indexed. This issue only affects the Authorities and Extracts spreadsheets.

10.1 Build 63

The following resolved issues have been added to CaseMap version 10.1 (Build 63) released

June 18, 2012:

□ CaseMap sometimes would not launch in a terminal services environment

Resolved an issue where CaseMap would sometimes not launch due to an error when running in a terminal services environment, such as Citrix.

□ CaseMap DocManager displayed [Deleted Object] for documents with no Full Name and Short Name

Resolved an issue where CaseMap DocManager incorrectly displayed the Full Name of the spreadsheet record for a linked file when viewing that file. If the spreadsheet record had neither a Full Name or Short Name field value, CaseMap DocManager displayed "[Deleted Object]". It now displays "**DELETED OR NO SHORT NAME**".

□ Send to CaseMap from a PDF downloaded from File and Serve was not working properly

Resolved an issue where Send to CaseMap from a PDF downloaded from File and Serve was not working properly, indicating "There was a problem reading the document."

10.0 Build 244

The following resolved issue has been added to CaseMap version 10.0 (Build 244) released May 2, 2012:

□ Send to Microsoft Word from CaseMap was not working properly with the CaseMap add-in for Word loaded

Resolved an issue where the Send to Microsoft Word feature in CaseMap was not working properly when a Word document was already open with the CaseMap add-in for Word loaded. The send operation fails with a warning message. Disabling the CaseMap add-in allowed sending data without a problem.

10.0 Build 241

The following resolved issues have been added to CaseMap version 10.0 (Build 241) released April 4, 2012:

□ CaseMap would not index a file open in Microsoft Word

Resolved an issue where CaseMap would not index a linked file that was open in Microsoft Word. CaseMap should index a file as long as it is not opened exclusively.

⊟ OCR was not working for some users due to a license error when processing linked files

Resolved an issue where the OCR was not working for some users due to a license error when processing linked images. Nuance provided version 18.1 of Licensing Manager, which corrected the issue.

10.0 Build 233

The following resolved issues have been added to CaseMap version 10.0 (Build 233) released February 24, 2012:

⊟ CaseMap would not create a new case when selecting a template from a prior version while in the New Case Wizard

Resolved an issue where CaseMap would not create a new case when selecting a template from a prior version while in the New Case Wizard. It displayed a message indicating there was a problem and would not continue. This problem exists in CaseMap version 9.

⊟ CaseMap would not OCR PDF files that contain any text

Resolved an issue where CaseMap would not OCR a PDF that contains text, even if most of the PDF is an image. This issue affects image PDF files that have been Bates stamped, since the stamps are usually added as text on top of the image. The resolution is a temporary workaround for users who only have image PDF files and is not enabled by default. Contact CaseMap Technical Support for assistance with this issue.

10.0 Build 229

The following reported issues have been resolved in CaseMap version 10.0 (Build 229) released February 16, 2012:

⊟ CaseMap could not embed .zip or .rar files in a PDF report

Resolved an issue where CaseMap could not embed a .zip or .rar file linked to a case in a PDF report. The PDF report was not generated. CaseMap now embeds the file correctly and generates the report.

⊟ CaseMap would not launch if the trial period had expired

Resolved an issue where CaseMap would not launch if the trial period has expired, and it could not be activated because the user was unable to access the activation wizard.

10.0 Build 227

The following reported issues have been resolved in CaseMap version 10.0 (Build 227) released February 13, 2012:

⊟ DocPreviewer converted emails to PDF with a black background

Resolved an issue where HTML and RTF emails converted to PDF from DocPreviewer's Email to PDF Wizard resulted in a black background for the email's body text on computers that had Windows version 7 installed and the Internet Explorer version was upgraded to version 9. This issue made it impossible to read the email's body text. A hot fix for this issue is also available for CaseMap versions 8 and 9. Contact CaseMap Technical Support to obtain the hot fix.

⊟ Send to TimeMap feature did not recognize a custom date-only field

Resolved an issue where records from a spreadsheet that displayed a custom date-only field were sent to TimeMap and CaseMap did not send the date entered in the date-only field. The date that displayed in TimeMap was the current date. This issue only occurred with custom date-only fields. Date and time fields did not have this problem.

⊟ CaseMap incorrectly adjusted the GMT time zone for Daylight Saving Time

Resolved an issue where CaseMap adjusted for Daylight Saving Time in Fact records with dates entered that specified the Greenwich Mean Time (GMT) time zone. GMT does not observe Daylight Saving Time.

⊟ CaseMap crashed when the number of active monitors was changed on a multi-monitor system

Resolved an issue where an unhandled exception error occurred and caused CaseMap to shut down when the number of active monitors was changed on a multi-monitor system and caused a change in some of the screen tips in CaseMap. This issue occurred when a projector was unplugged while CaseMap was running and a mouse cursor was placed over a spreadsheet field header to display a screen tip.

⊟ CaseMap does not always release a case exclusive lock

Resolved an issue where a few features in CaseMap that require an exclusive lock did not release the exclusive lock when the feature was finished being used. CaseMap features that require an exclusive lock include: Create Replica Wizard, Auto Number Records (case tool), Bulk Field Copy (case tool), and Bulk Field Update (case tool).

Current issues

10.0 Build 227

The following items are current issues in CaseMap version 10.0 (Build 227) released February 13, 2012:

⊟_**CaseMap DocManager Linked File Text Hits report includes a temporary file name in the footer of each page when printed**

CaseMap uses Internet Explorer to display the report, and it includes the temporary file name for the HTML file by default. The workaround is to change the footer format text in the Internet Explorer Page Setup dialog for the purpose of printing this report.

⊟_**CaseMap DocManager does not support opening attachments in Outlook MSG or PDF files**

When viewing an Outlook email (MSG) or PDF file in CaseMap DocManager, it is not possible to view the attachments contained in those files. Use the Open Native feature to view the email in Outlook or the PDF in Acrobat to access the attachments.

⊟_**Searching for a word followed by an Object Short Name does not return any results when the search text is enclosed in quotes**

CaseMap allows entering a search with a word followed by an Object Short Name where the search text is enclosed in quotes, but when running the search, it does not return any hits. For example, searching for "including HawkinsP" (with the quotes) in the Hawkins example case does not return any results. Change the search text not to include the quotes, e.g. including HawkinsP.

⊟_**When searching for a number, some spreadsheet hits are included because one or more the date fields include that number**

CaseMap indexes dates as numbers also. If a date field, such as the Creation Time Stamp field, includes the number being searched, then that spreadsheet record will be returned as a hit. For example, the search =12 will return records with a Creation Time Stamp of 12/31/2011.

⊟_**CaseMap DocManager may not highlight all of the hits in a document**

CaseMap DocManager may not highlight all of the hits in document when viewing documents from the search results. The indexed text may have slightly different word breaks than displayed in the CaseMap DocManager viewer. CaseMap may also find search hits in the document properties, which are not visible in CaseMap DocManager.

⊟_**CaseMap does not search the original document properties of an image**

CaseMap does not retain the properties, or metadata, of an image that must be processed for OCR for the purpose of full-text searching. For example, CaseMap will not find search hits

in the properties of a TIFF image linked to the case. Use the Open Native feature to view the original properties for an image.

Existing annotations are not removed when changing the Linked File value for a spreadsheet record

CaseMap does not delete the annotations that are associated with a spreadsheet record when changing the value in the Linked File field. This behavior avoids losing annotations on a document when changing the path to the linked file, rather than linking a different file to the record. There is not currently a mechanism in place to determine that it is the same file in a different location. The workaround is to clear the Linked File value and save the record. Then link to the new file.

PDF files with a password protection encryption level higher than 40-bit (RC4) are not indexed

Some PDF files may be reported as encrypted during indexing, even though no password is needed to open the file. This can occur because encryption is sometimes used in PDF files to enforce restrictions on printing or extracting text from a PDF file.

PDF files can have two kinds of passwords:

1. A password that prevents any access to the file unless the user enters a password before opening it in Adobe Reader. CaseMap cannot index files with this type of encryption at all.

2. A password that prevents certain operations (printing, editing, etc.) only. This type of PDF file can be opened in Adobe Reader with no need to enter a password, but other actions may not be allow for file. CaseMap can index this type of PDF file only if the encryption level is 40-bit (RC4). If higher-level encryption is used, then CaseMap cannot access the text in the PDF file.

To tell what kind of encryption is used in a PDF file, open the PDF file in Adobe Reader and click File > Document Properties, and click the Security tab.

CaseMap DocManager may not display all of the pages in a PowerPoint presentation in 2007 or later format

CaseMap DocManager only displays the first couple of pages for some PowerPoint 2007 format files. This problem does not occur with all PowerPoint presentations. If it does occur, use the Open Native feature to view the presentation in PowerPoint.

Highlighting the search hits in some large (700 pages or more) files may take longer than a minute

Hit highlighting large documents in CaseMap DocManager takes a long time. This issue seems to occur with any large PDF. The larger the file, the longer it takes to do the hit highlighting. By default, CaseMap DocManager does not automatically hit highlight any document with more than 30 pages, but there may be a noticeable delay when clicking the information bar at the top of the document to display the highlighted hits.

CaseMap DocManager switches to the Fit Page view when opening a link to an annotation from the search results

CaseMap DocManager zooms out to show the entire page of the document containing the linked annotation to ensure that the annotation is visible instead of scrolling the document without changing the zoom level.

⊟ CaseMap DocManager may not display text correctly in some PDF files

CaseMap DocManager may skew the text in some PDF files contains text on top of an image. This problem does not occur with most PDF files. If it does occur, use the Open Native feature to view the file in Adobe Acrobat or another PDF viewer.

⊟ CaseMap DocManager will not display some CSV files

CaseMap DocManager will not display Comma Separated Values (CSV) files containing some special characters. These characters are shown in the Insert Symbol dialog with keystrokes of Alt+0160 and higher. These are special symbols, such as copyright and registered trademark, and foreign language characters that are not likely to be found in most CSV files. If this problem occurs, use the Open Native feature to view the file in another program, or change the file extension of the file from .csv to .txt.

⊟ CaseMap DocManager is very slow to open files when Lucion File Center is configured for use with CaseMap

CaseMap DocManager is not currently compatible with Lucion File Center, which is a third-party product intended to replace Windows Explorer for navigating files on a computer. When using this product, it takes much longer to open even small documents in CaseMap DocManager.

⊟ CaseMap does not OCR PDF files that contain any text

CaseMap will not OCR a PDF that contains text, even if most of the PDF is an image. This issue affects image PDF files that have been Bates stamped, since the stamps are usually added as text on top of the image.

⊟ CaseMap cannot embed .zip or .rar files in a PDF report

CaseMap cannot embed a .zip or .rar file linked to a case in a PDF report. The PDF report is not generated.

⊟ CaseMap will not launch if the trial period has expired

CaseMap will not launch if the trial period has expired, and it cannot be activated because the user is unable to access the activation wizard. Contact CaseMap Technical support for assistance with this issue.

⊟ CaseMap DocManager does not hit highlight proximity phrases correctly

CaseMap DocManager highlights occurrences of individual words in a phrase or proximity search, in addition to the full phrase. For example, when searching for the phrase hawkins left, all occurrences of hawkins, left, and hawkins left are highlighted, even though they are not returned as hits in the search.

⊟ CaseMap DocManager displays [Deleted Object] for documents with no Full Name and Short Name

CaseMap DocManager displays the Full Name of the spreadsheet record for a linked file when viewing that file. If the spreadsheet record has neither a Full Name or Short Name field value, CaseMap DocManager incorrectly displays "[Deleted Object]". Specify a Full Name for the spreadsheet record to display a meaningful name when viewing the linked file.

⊟ CaseMap cannot delete a spreadsheet with several thousand records on it from an Access case

CaseMap shuts down with an error when trying to delete an Object spreadsheet with several thousand records on it. To avoid this problem, delete all of the records from the spreadsheet first by clicking Tools > Case Tools > Delete All Records in View. Then try deleting the spreadsheet.

CaseMap v9.0

Enhancements

CaseMap v9.0 introduces centralized and secure remote access to cases using Microsoft® SQL Server®. CaseMap v9.0 SQL allows speedy access to cases over a wide area network (WAN) or local area network (LAN), or to traditional CaseMap cases on a LAN. SQL cases provide additional security and flexibility so different users can use different sets of features they need to work on the cases. End-users who are familiar with using CaseMap's earlier versions will not have to learn any new features — the only thing that has changed is the flexibility of creating some cases that may be unusually large or long-lived for the CaseMap SQL server environment.

For more information, see the CaseMap Server help system.

Host cases on Microsoft SQL Server

Before CaseMap v9.0, CaseMap stored case information in Microsoft® Access databases. Our LexisNexis CaseMap development staff has now customized the appearance and ease-of-use of these files to make them uniquely CaseMap. Most users save the cases on a shared network server for multi-user access and backup security.

CaseMap v9.0 introduces case files that can be created and stored on SQL Server, making it easier, more robust and scalable to sort out case data and relationships. Don't worry if your organization does not have a SQL Server. There's no need to buy one and set it up because CaseMap v9.0 still creates cases that can be stored locally on a regular network server.

Review the two types of cases

- SQL Cases — Created by a system administrator using a special CaseMap Admin Console. Designated case staff are assigned to cases by the administrator. When SQL cases are enabled, users have the option of opening local or SQL case files.
- Local Cases — Created by anyone running CaseMap v9.0 and saved to a designated network folder. Case staff can be edited by anyone who's authorized to do so. Local cases are exactly the same as previous versions of CaseMap case files.

Relax with features remaining identical to CaseMap v8.5

Existing CaseMap users will recognize that the program feature are identical to those in CaseMap v8.5. The appearance of CaseMap v9.0 is the same as CaseMap v8.5, except for installations that have the SQL case feature switched on.

If SQL cases are enabled in CaseMap v9.0, the SQL features appear when you open CaseMap, allowing users the option of opening a local case or SQL case.

Employ centralized case and user administration

IT and Litigation Support Professionals asked for greater security for CaseMap cases and CaseMap v9.0 delivers. Organizations that use CaseMap v9.0 and install the CaseMap Server and CaseMap Admin Console are able to centrally control the creation of new SQL cases and assign users to cases. Administrators are able to assign specific permissions for case staff. Permissions are assigned to a user via roles. Users will have the same set of permissions when assigned to single or multiple SQL cases. For example, some users may be able to enter data on a case but are not able to create or delete custom fields.

⊟ Enjoy improved performance

Large organizations share cases over a wide area network (WAN). The cases often grow over time into large files. CaseMap v9.0 SQL cases provide faster performance over a WAN and easily handle large amounts of case data — even if case staff are working in the same case while some are located in New York and others in Los Angeles.

⊟ Benefit from a static price

There is no additional cost for CaseMap v9.0 and the SQL components required to enable a SQL server to host CaseMap cases. If your organization has CaseMap subscriptions that are current, you have the option to use CaseMap v9.0 and the SQL features.

For more information, see the CaseMap Server help system.

⊟ Contact Support and Sales with questions

For sales questions, please contact your LexisNexis CaseMap account representative at 866-316-8525 or send email to LitigationSalesGroup@ReedElsevier.com.

For technical support, please please call 800-833-3346 (option 3). Hours for live support are 9:00 AM to 9:00 PM, Eastern U.S. time. Or send an email to casemap.support@lexisnexis.com.

CaseMap v8.5

Enhancements

For more information on the following enhancements, reference the topics noted for the CaseMap Answer Center.

⊟ Updated integration with Shepard's Citations

Automatic look-up for Shepard's signals for case law citations when a case is opened.

Shepard's signal status display for each case law citation in the Authorities spreadsheet.

For more information, see the About Shepard's Signals and Using Shepard's Signals topics.

⊟ **Integration with LexisNexis online content**

Integration with LexisNexis online content allows you to easily perform context-specific searches for people, organizations, issues, and case law.

For more information, see the Using online research tools topic.

⊟ **New Case Jumpstart Wizard**

CaseMap's new Case Jumpstart Wizard allows for initial data entry of a cast of characters when a case is first created.

For more information, see the Using the Case Jumpstart Wizard topic.

CaseMap v8.0

Enhancements

For more information on the following enhancements, reference the topics noted for the CaseMap Answer Center.

⊟ **User interface design changes**

CaseMap introduced a new user interface design that looks and feels like Microsoft® Outlook 2007. The navigation pane displays favorite spreadsheets in the top panel for easy access. All spreadsheets in the case display in the All Shortcuts panel. To make a spreadsheet a favorite, right-click on it in the All Shortcuts panel and select Add to Favorites.

For more information, see the About navigating and About the Getting Started pane topics.

⊟ **Friendlier spreadsheets**

With the new user interface design, spreadsheets now look different too. Rows display in alternate shades so it is easier to track information across the spreadsheet. Selected records now display all field buttons for drop-down menus or other tool options. All records with linked file attachments now display a Paperclip icon, even if the record is not selected. Tool Tips are also available for each field by floating your mouse pointer over the field header.

⊟ **New Case Replication Wizard**

A new Case Replication Wizard makes it easier to take a case replica and set of linked documents on the road. The wizard makes it easier to put a replica and folder of linked documents on a laptop. You also have the option of saving a replica to another location on the network.

For more information, see the Creating replica cases topic.

⊟ New DocPreviewer add-in for Acrobat PDF and Outlook integration

CaseMap's new DocPreviewer add-in program builds on the success of earlier add-ins for PDF documents viewed using Adobe® Acrobat or Reader. Linking multiple PDFs into CaseMap is the most popular DocPreviewer feature. With the CaseMap v8.0 PDF Review feature you can browse through linked PDFs to extract facts with just one window open for the documents. DocPreviewer's premium features (additional subscription required) are Bates Stamping PDFs, Acrobat and CaseMap Bates number recognition and importation into appropriate Documents spreadsheet fields, and converting Microsoft® Outlook PST files to PDFs. Importing DocPreviewer-converted emails into CaseMap optionally adds senders and recipients to your CaseMap cast of characters, too. DocPreviewer tools are accessible as shortcuts on the navigation pane.

For more information, see the About PDFs and DocPreviewer topic.

⊟ Bates Stamp PDFs

Use to Bates stamp PDF files. See the Bates stamping PDFs topic.

⊟ Convert E-mails to PDF

Use to convert emails in Microsoft® Outlook folders to PDF files that can be sent to CaseMap. Any email attachments are embedded in the PDF file. You have the option to populate the Persons spreadsheet with senders and recipients of the email. A wizard helps makes this conversion process easy. CaseMap will automatically link the emails to the senders and recipients. See the Converting emails to PDF topic.

⊟ Import PDFs

Use to import one or multiple PDF files in to CaseMap. Data imported includes the page count, Bates numbering, the document's full name and short name. Body content from the PDF file is imported by using CaseMap's Send To utility. You must have Adobe® Acrobat (Standard or Professional) installed on the same computer as CaseMap to use this feature. See the Importing PDFs topic.

⊟ Review PDFs

Use to review a set of linked PDF files in Acrobat without having to open multiple documents and flip back and forth between the PDF file and CaseMap. Buttons in the Acrobat toolbar allow you to move to the next or prior linked document. See the Reviewing PDFs topic.

⊟ Batch Print PDFs

Use to print all linked PDF documents in a spreadsheet. See the Batch printing linked PDFs topic.

⊟ Create a Privilege Log

Use to launch a Privilege Log from the DocPreviewer panel of the Navigation pane. This CaseMap report wizard is new to the DocPreviewer pane and still accessible from the Reports menu. See the Printing a Privilege Log topic.

⊟ Analyze Bates Numbers

Use to run reports on whether there is any duplicate Bates numbering of documents or any gaps in numbering. This tool includes an option to save current tab data as a report. See the Analyzing Bates numbers topic.

Locate a Bates Range

Use to search a Bates range to locate a particular set of records, which then displays in the Documents spreadsheet. See the Locating a Bates range topic.