

No part of this work may be reproduced or transmitted (y)83.333()28(b) in3()28(b) any form or by any means, electronic or mechanical, i

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About CaseMap

#

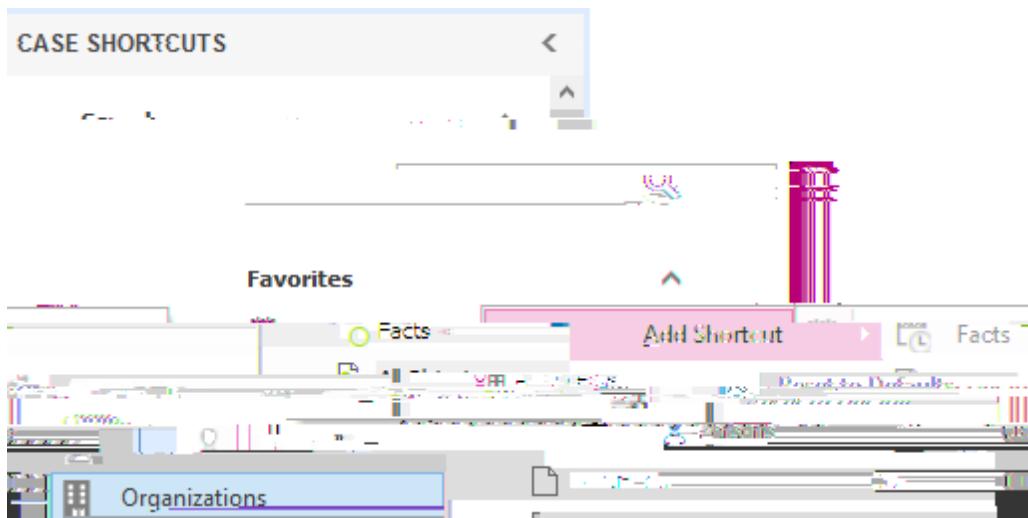
1

The ribbon can be customized to add/remove tabs from the display. All ribbon/toolbar customizations are saved and retained by CaseMap.



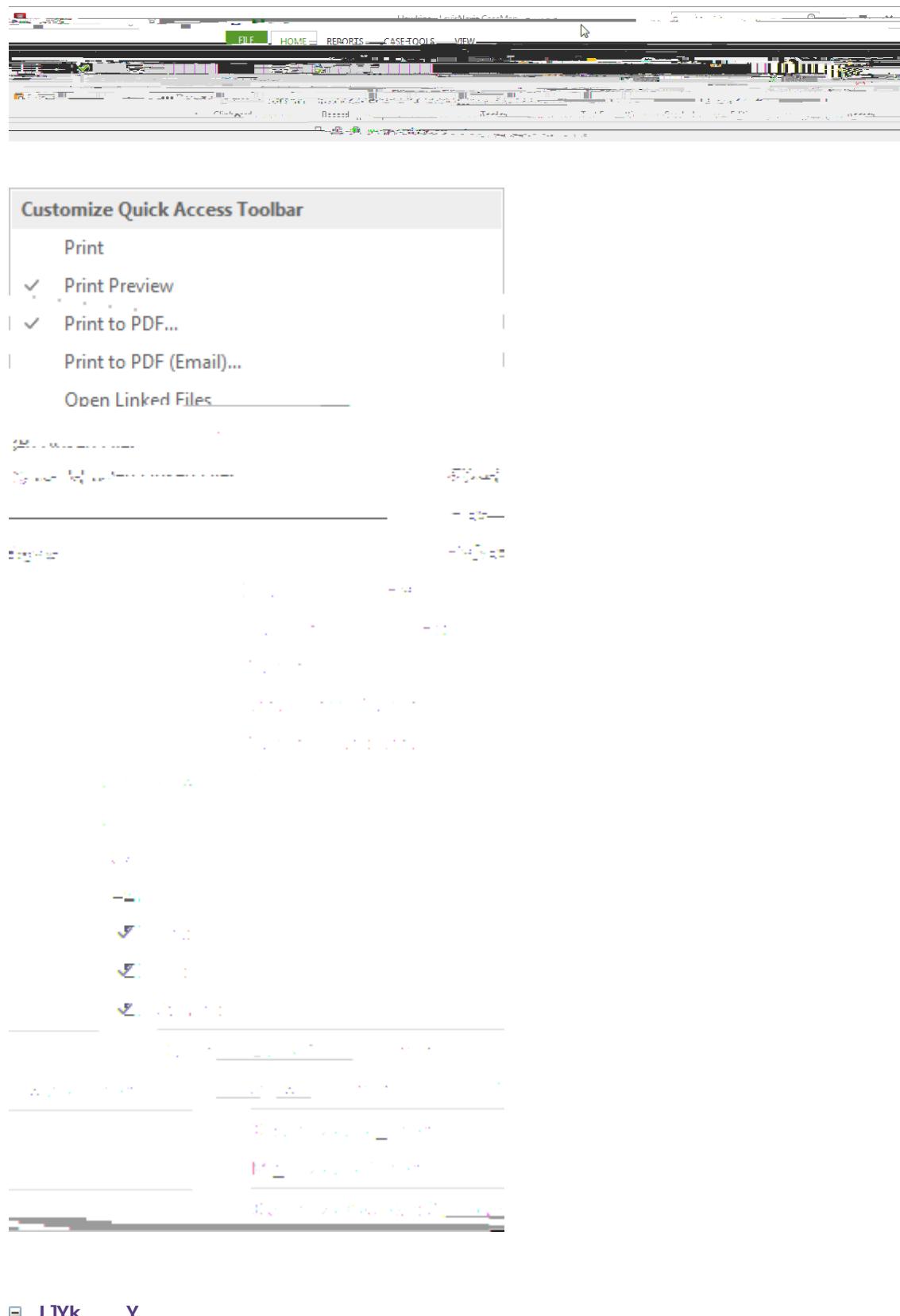
VI. Click **C?** to close the

 GYUfW F Ygi hg

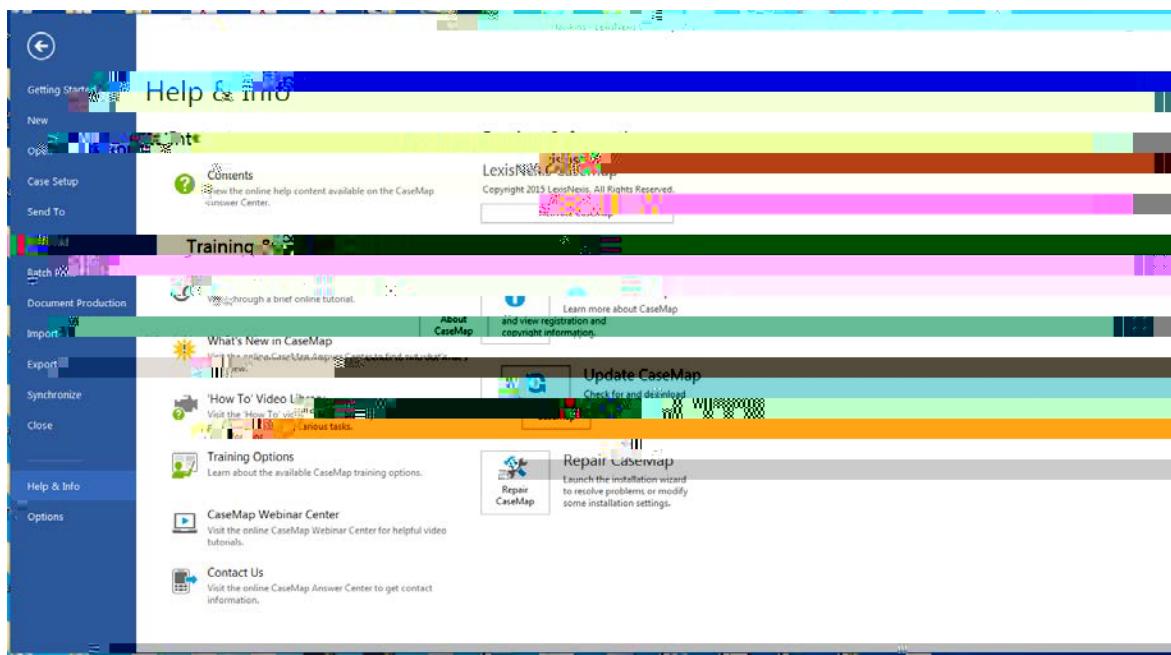


Right-click and then click Move Up in List or Move Down in List.

Hc fY a cj Y'U'gdfYUXg\ YYh]Mcb Zfc a 'h Y: Uj cf]Hg'dUbY







[Related Topics](#)

[About the Getting Started tips](#)

[About the Quick Start tutorial](#)

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output to paper, PDFs, or Microsoft® Word. Your case analysis reports will become the raw materials that make it far easier to generate documents required by the court. For example, your Fact Chronology will make it easy to create Motions for Summary Judgment and to produce

Opening cases

Case files are databases created to store all the data related to the case. Some cases are

Changing passwords

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

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

We recommend that you and all users set passwords and change them on a regular basis to

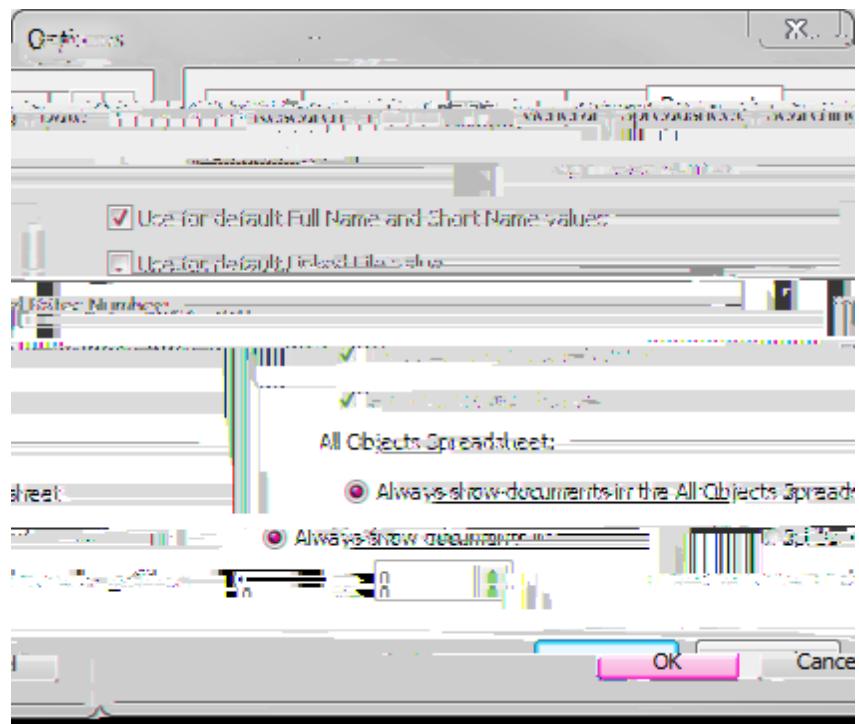
Checklist: Creating Cases

	Task
	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?
■	



information.

[Related Topics](#)



b. Under



9. In the **7UgY:]Y** box, type in the name for the case : **]Y\b7UY**.
10. Click **6** to navigate to the directory location where you want to store the case, then click **C?**.
11. Click **BYI** to continue.
12. In the **7C :]b]gN** to create the new case.
 1. In the **7UgY C**
 - C?.**

2. Click **7ca di Wyf**

[Related Topics](#)



Changing spreadsheet elements

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

The new view automatically displays in the sp67()18.667(a)-65.667(u)-33.667(t)-22.667(



3. In

two case elements (58 facts linken to Wrongful Termination issue). A filterm # field c24(o)-59.6unts only those links that meet cerain crtera. Forexample, the # Unnisput67(m) field c24(o)-59.6unts the numberof unnisput67(m)56.33n facts linken to each issue on the sprmnsheet (23 unnisput67(m)56.33n facts linken to the Wrongful Termination issue).

7. W h gYY U ghX]Uc[Vcl

D24(o)-59.6uble-click in a # field cell orclick the Ellipsis button to nisplay a list nialog box de all rm24(o)-59.6rs rrrrm67(m)56.33nten in the field c24(o)-59.6unt. You can also prnt, prnt data in the list nialog box if needed. Fleds nisplayen in a list nialog box can be customiz67(m)56.33n by clicking on a field header



8. W h gYY U ghX]Uc[Vcl

 8YHJ]`X]Uc[`Vcl Yg



Related Topics

[About fields](#)

Inserting/hiding fields

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

1. On the **J Yk** ribbon, in the **7UgY\G\cfHW\hg** group, click on the spreadsheet (icon) you want to use.

2. In the **7i ffYbhM : JY271 -14 Td [wAgWh]** then click **g**

J h: **J** **fields; sign** the check box for the field(s) you want to spread sheet and click **C**.

ields display to the left of the selected field.



Hc Udd'mZ]Y X'gYWfJlm

1. Click on the field header for the field you want to apply security to and click : **JY'X DfcfdYfHg**.
2. In the : **JY'X DfcfdYfHg** box, click on the

Changing field values

Deleting fields

If you need to remove a field that is no longer relevant, you can permanently delete it from a case. You can delete any fields you create for a case. You cannot .667(n)-33.667()75(l)24(e)-70.667(t)-22.667(d)-Excel file and save it for reference. Once a field is .667(n)-33.667()67(l)24(e)-70.667(t)-22.667(e)-70.667(d)-



 Hc`fYj]Yk 'H Y'I gY'<]g**hcfmigdfYUXg\YYh**

1. On the :TY menu, click **DfcdfYfHg**.

Issues Spreadsheet Field Listing		
Field Name	What it Displays	Using It
text. To ensure consistency, use		
Full Name		



Objects spreadsheet field list

Objects Spreadsheet Field Listing — Common

Field Name	What it Displays
------------	------------------

Objects Spreadsheet Field Listing — Unique

Field Name	What it Displays	Using It

dsheet Field Listing — Unique		
Field Name	What it Displays	Using It
	hearing (e.g., deposition, grand jury hearing, arraignment).	list of options or add a new one.

CH Yf 8]gWzj Yfm

Respo7(n)-73 +>id

Objects Spreadsheet Field Listing — Unique

Field Name	

Questions Spreadsheet Field Listing		
Field Name	What it Displays	Using It
	Tip: Normally, the Linked File field is used to link a file to a record, especially when using the Send to CaseMap feature. Documents that have been linked into CaseMap can be linked to records in other spreadsheets by using the document short name in any description field that displays the chain-link symbol in the field title.	re-linked if the file8.667(s)-62.333(File8.667(s)-62.333()1linked to this included in search results or reports. Related file8.667(s)-62.333 linked to other spreadsheets.
Research Notes	Note you make2.333()1a8.667(s)-6r8.667(s)-(w)-98.667(e)-70.667(r)1Cotext8.667(s)-uhre2.333()(c)21(o)-59.	

Related Topics

[About fields](#)

[Creating custom fields](#)

[Analyzing and linking questi3667ncus](#)

Authorities Spreadsheet Field Listing







Hc`i gY`h Y`@]b_`5gg]gHUbh`hcc`

- If a crucial object has a recognized nickname, use it as the object's short name based on the 80-20 rule that 20 percent of the witnesses, documents, and other objects in a case will generate 80 percent of the facts and questions.

 **Hc WUb[Y U g\cfhbUa Y**

1. In the

[Related Topics](#)

[About short names](#)

[Changing short names](#)

Tips for using object spreadsheets

Spreadsheet

1. On the <ca Y tab, under **AcfY**, click **5XXCVYYM**

A blank object record automatically displays for you to start entering data.

: UVWg`GdfYUXg\ YYhCj Yfj]Yk

[Related Topics](#)

[About facts](#)

[Entering facts](#)

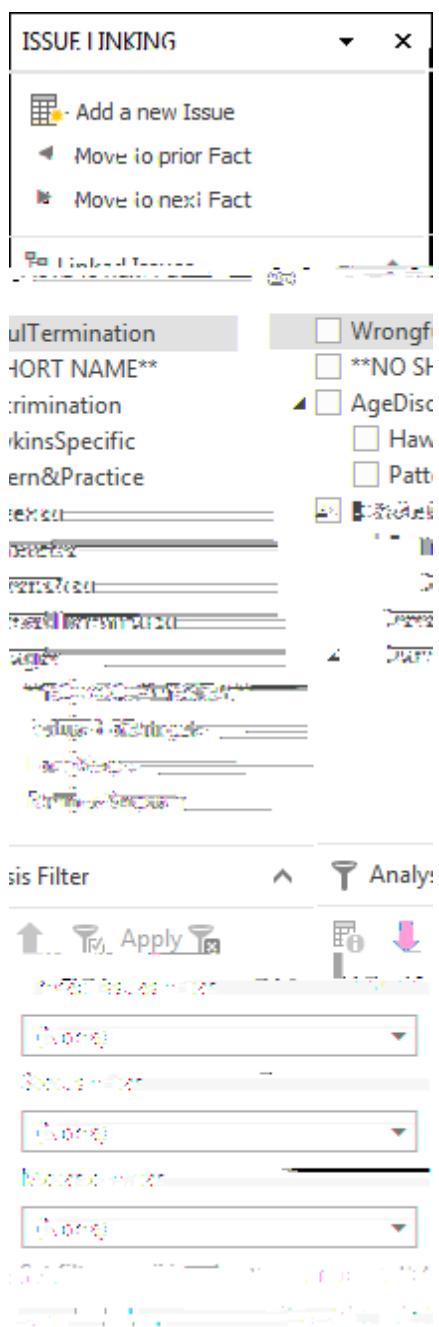
[Analyzing and linking facts](#)

Entering Issues

About issues

Issue outlin67(i)24(n)-33.667(g)-43.667()18.6m(s)-62.333(s)-62.333(u262.667()18.667(f)1862.333(s)-.667()

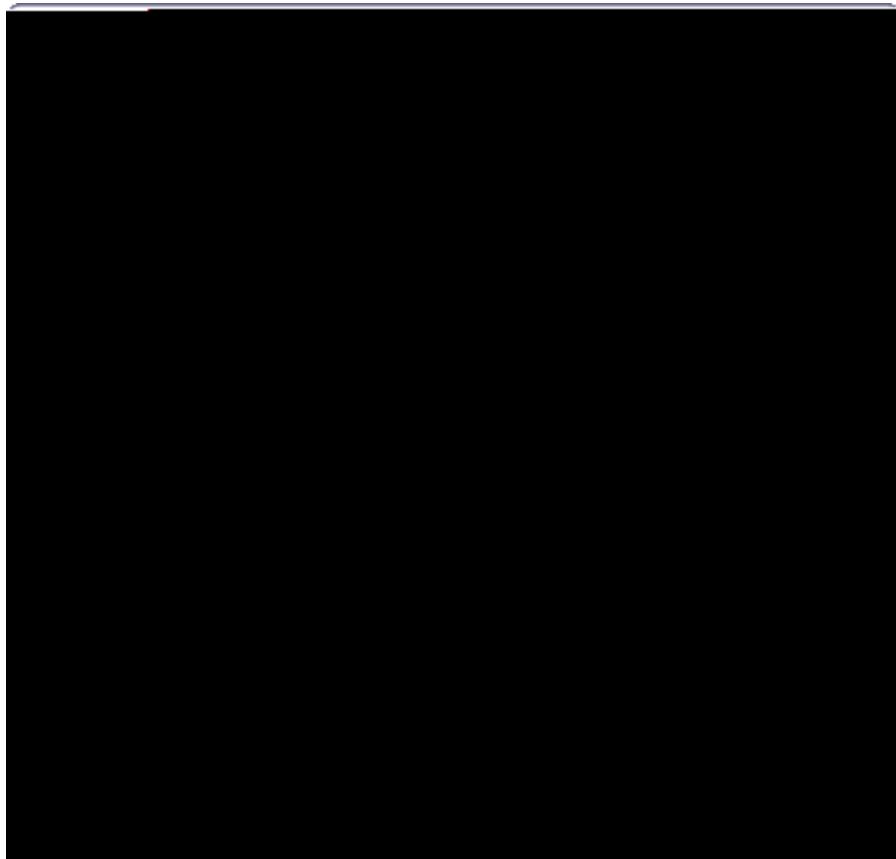




For more information, see [Creating outlines](#).



Case content may also be linked directly to issues when it is imported from another application (such as Acrobat PDF files) using the Send To CaseMap utility.



7fYUHY Ub]b]HU`]ggi Yg'ci h]bY

1. [Open/create](#) the new case.

2. On the <ca Y ribbon, click the BYk FYWtfX button, and then click =ggi Y.

A blank issues record automatically displays in the spreadsheet for you to start entering data.



3. In the :i ``BUa Y cell, type in the full name of the first issue.

4. Press HUV to navigate to the next cell.

Notice how the Short Name cell automatically fills in for you.

5. Optional: Click the BYk FYWtfX button and click =ggi Y.

You can a7(i)24(l)24(l)20 press the Insert key to add a667(h)-33.667(e)-70.667()18.w re

6. Continue entering all primary level issues in this man.667(e)-70.667()18.r.

3. Click on the arrow point until the issue moves to the location you want it in the spreadsheet.

 **Hc XY YH Yggi Yg**

1. In the **=ggi Yg** spreadsheet, click to select the issue record you want to delete.
2. Click the **8Y YH YFYWtfX** button on the **GHUbXUfX** toolbar.

The issue record is now permanently deleted from the case.



[Entering questions](#)

[Analyzing and linking questions](#)

Entering questions

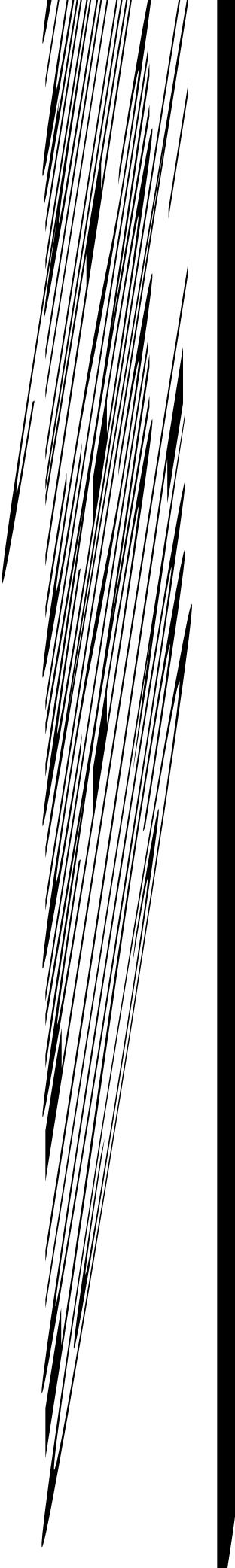
6. In the **5bgk Yf GHUH g** cell, leave the status as

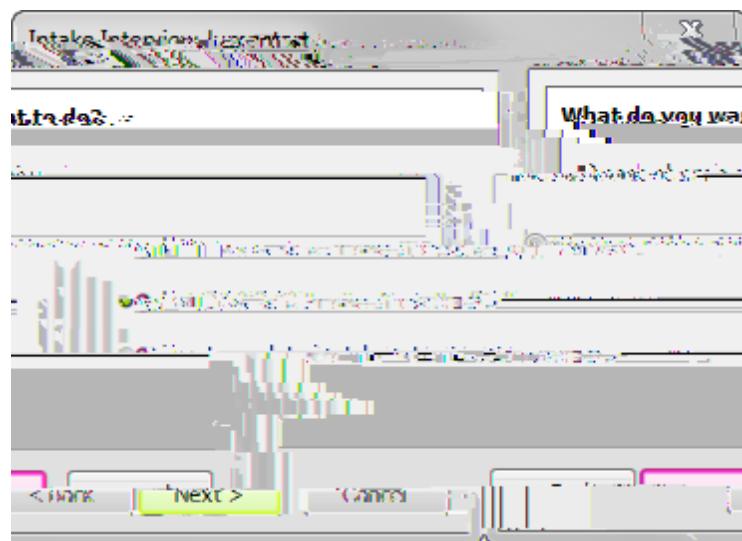
9a UJ button .

The Email dialog box displays.

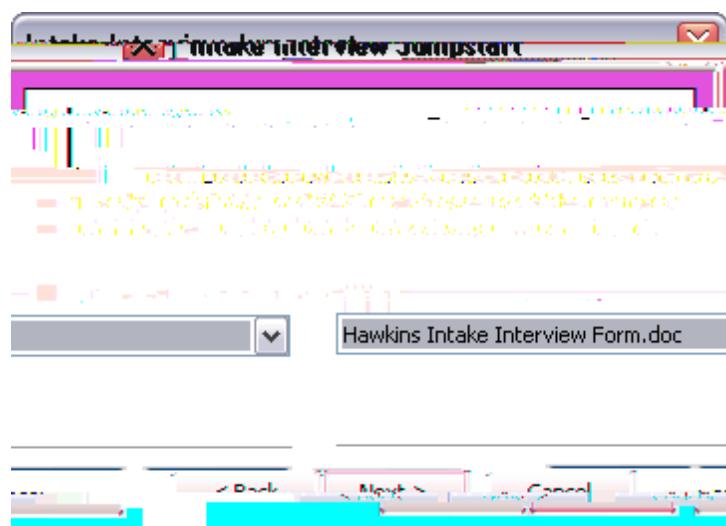
3. **6UgJWCdhkbg** tab after confirming the documents to be sent.

4. **K \UhVnderdthe c bhh a UJ**





5. In the **9a UJ`8cW a Yb H5bWW a Yb HBUa Y**



8. In the **7\ccgY\XUH\Zcfa UhUbX\gHUfh]a dcfh** box, click the date format you want to use or keep the default date format of a **#X#mm** in the



6UhYg`GhJa d]b[`Cj Yfj]Yk

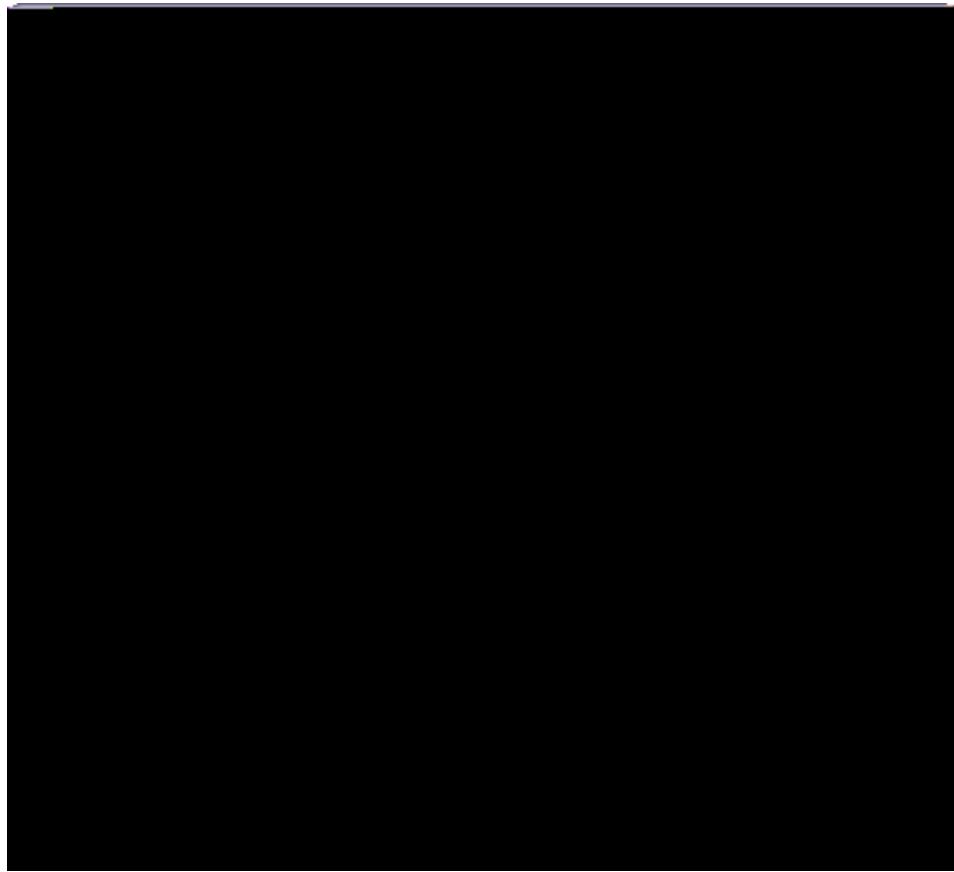
- The Bates Stamps PDFs utility recognizes Acrobat Bates stamps but cannot remove or replace them. If you choose to stamp PDFs containing Acrobat Bates stamps, the original stamps will remain, resulting in multiple Bates stamps on the PDFs.

If a value is changed in either the Bates - End or Pages fields in the Documents spreadsheet, the other field is then synchronized and adjusts its values accordingly.

@VUfb`ck `hc`6UhYg`ghJa d]D8: g`UZhYf`H`YmUfY`]b_YX`]bh`7UgYA Ud

Bates stamping in CaseMap and DocPreviewer are slightly different processes although they are part of the same add-in tool.

D`YUgY`fYj]Yk `H`Y`Zc`ck]b[`VYZcfY`6UhYg`ghJa d]b[`D8: g



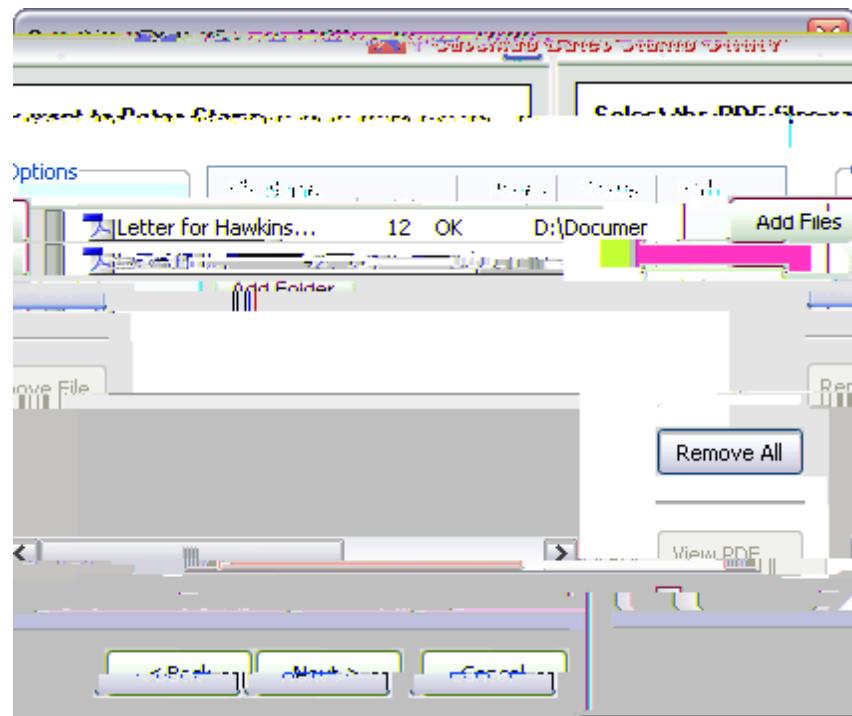
4. Click **C?** to continue.

The CaseMap Bates Stamp Utility now launches.

5. On the submenu, click **6UHYg'GHJa d'D8: g**.
6. In the message box, click **C?**.

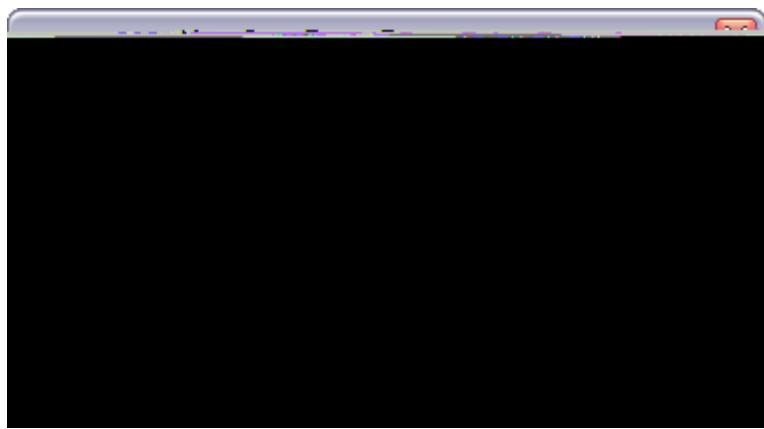
Notice that Acrobat automatically launches behind the CaseMap Bates Stamp Utility.

7. In the **7UgYA Ud'6UHYg'GHJa d'I H]lm** click **BYI**



If you need to delete a file from the list, select it and click the Remove File or Remove All button.

11. C67(QTJ 0 -14 TD [(b)-43.667(u)-33.667(6()18_0.75 0 0562)17.53<0031>1]TJ -<0048>-



16. In the **7UgY'BUa Y** field, type in the name for the Bates numbering format, then click : **]bg**.
17. In the **FYj]Yk 'WgY'6UhYg'Bi a VYf]b['Zcfa Uh** box, verify the Bates numbering range and prefix, as well as format settings.
18. Click the **9Xjh**



Importing PDFs

Bulk importing PDF files into CaseMap is a process that automatically attaches multiple PDF files to case records in the Documents spreadsheet. During the import process, CaseMap also brings in record data, including Bates begin/end numbers, the page count of the file, the date, and document name. Body content from PDF files is not imported. Short names are automatically created off the Full Name field entry you choose, whether it is a document file name or Bates number.

With the bulk import utility, you do not have to import or link to individual files because the Send PDFs to CaseMap tool bulk imports a folder of documents and sets the attachment links to object records for you. Once you have run the utility and imported documents from a network folder, you can still re-run it on the same folder. The import utility identifies previously imported files within the selected folder and selects only (n)-33.675(l)24(y)f68.667(a)-.667(i)24((n)-33.675(l)24(y)8.67

d me cu
al (f)1 0667s cp

attachment count and the name of attachments.

Once emails are imported into CaseMap, you can begin searching the new data as soon as the indexing process completes. When you click the paperclip icon for the new record, the email displays in CaseMap's DocManager.

- If selected email was not previously linked to CaseMap, the Send Email to CaseMap dialog box opens.

a. Perform the following:

- ▶ In the file name box, confirm the file name.
- ▶ Click the Browse button, and in the 'Save Email as' dialog box, locate the folder to save the email, and then click Save.
- ▶ In the Folder box, confirm the folder location.
Emails are saved as .msg files, using the email subject as the file name.



Optional: Double-click on the paperclip to display the linked file in DocManager.

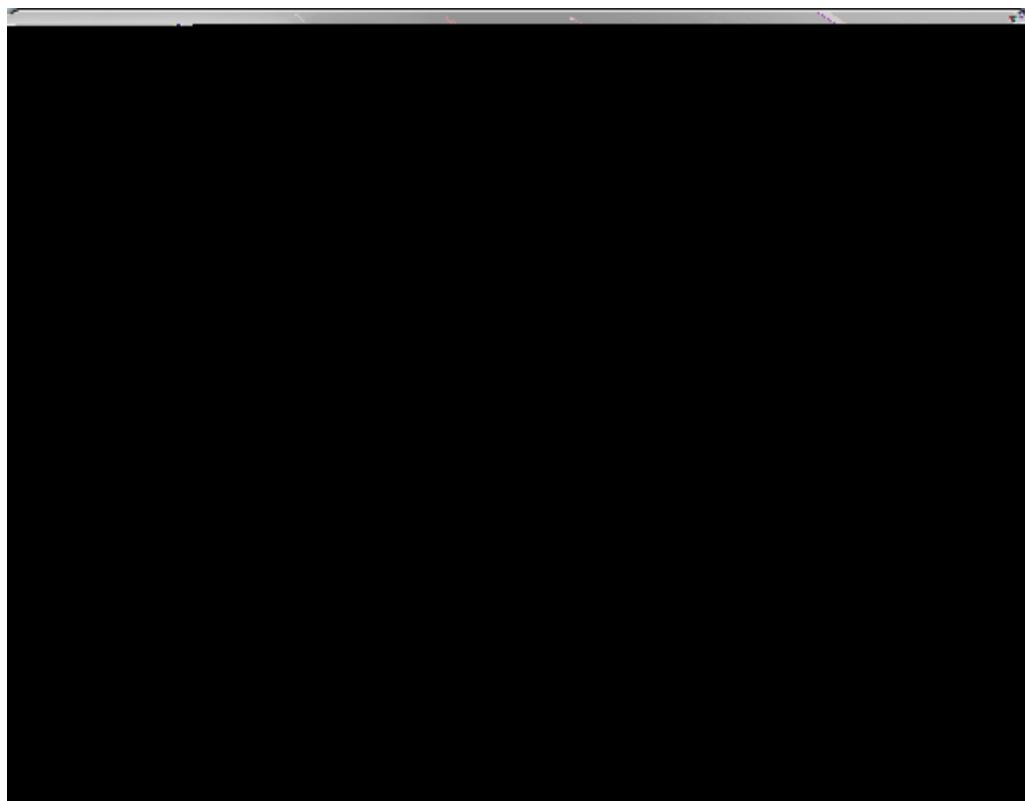
For more information, see [About DocManager](#)

9. In the

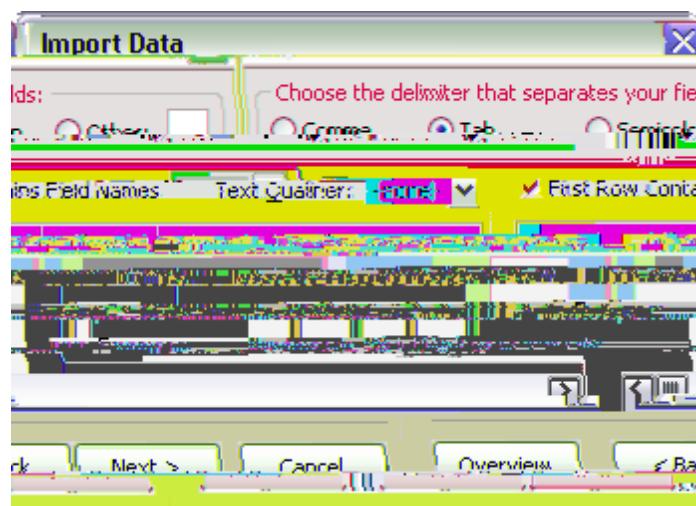
10. In the

You can also import PDF files using the [Import Documents Wizard](#)

119.60000000000001 9
119.60000000000001 9



11. Click **BYI h** to inn 11. Click



8. Select the :]fghFck '7cbHJ]bg':]Y'X'BUs Yg

19. In the message box to confirm the number of records successfully imported, click **C?**.

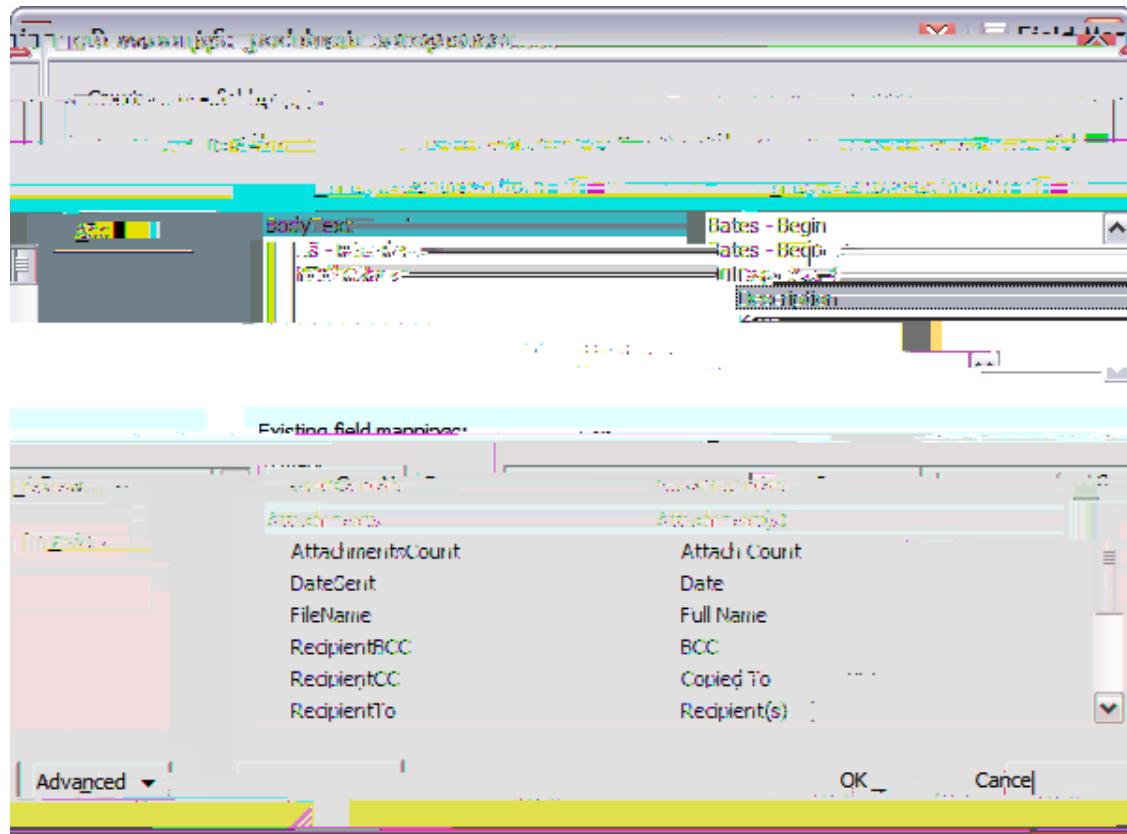
If any errors occurred, review t2.667(h)-33.667(e)-70.667()1error0.667()1log to determine



c. Optional: -5 587 -508 re W n q 60 -12 54/TT1 11 Tf231(2)11.33333334E5/TT1 1 54,

1. In **Ci hcc_**, click the **GYbX'9a UJ'hc'7UgYA Ud** button to open the **GYbX'9a UJ'hc'7UgYA Ud** dialog box.
2. Click the **: JY'X'A Udd]b[g** button to display the **: JY'X'A Udd]b[g** dialog box.

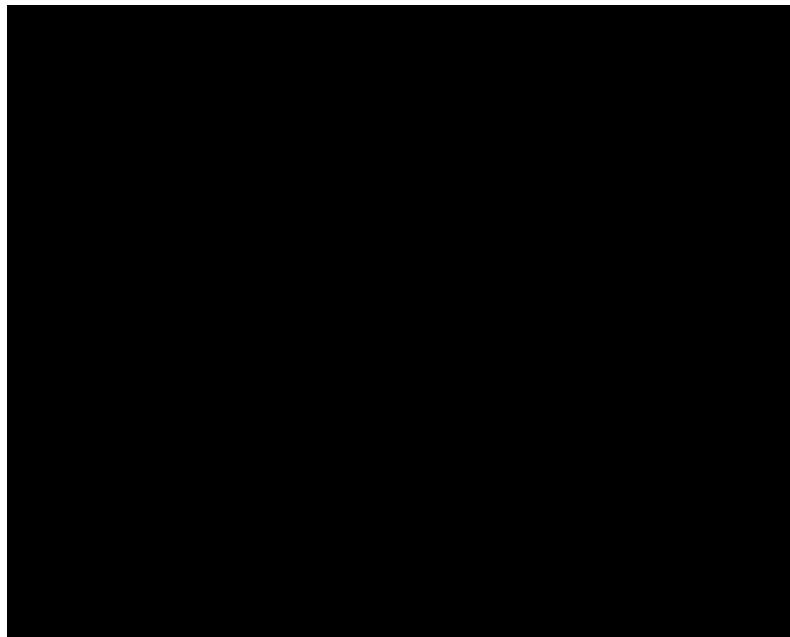
CaseMap provides a list of existing fields that are already mapped for you in the Existing field mappings box. You can modify the default list by clicking on the Remove button and re-mapping fields.



3. In the **I ba UddYX'Gci fW'ZJY'Xg** box, select the Outlook email field that needs to be mapped to a CaseMap field.

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

1. Click the **5Xj UbWX** button and then click



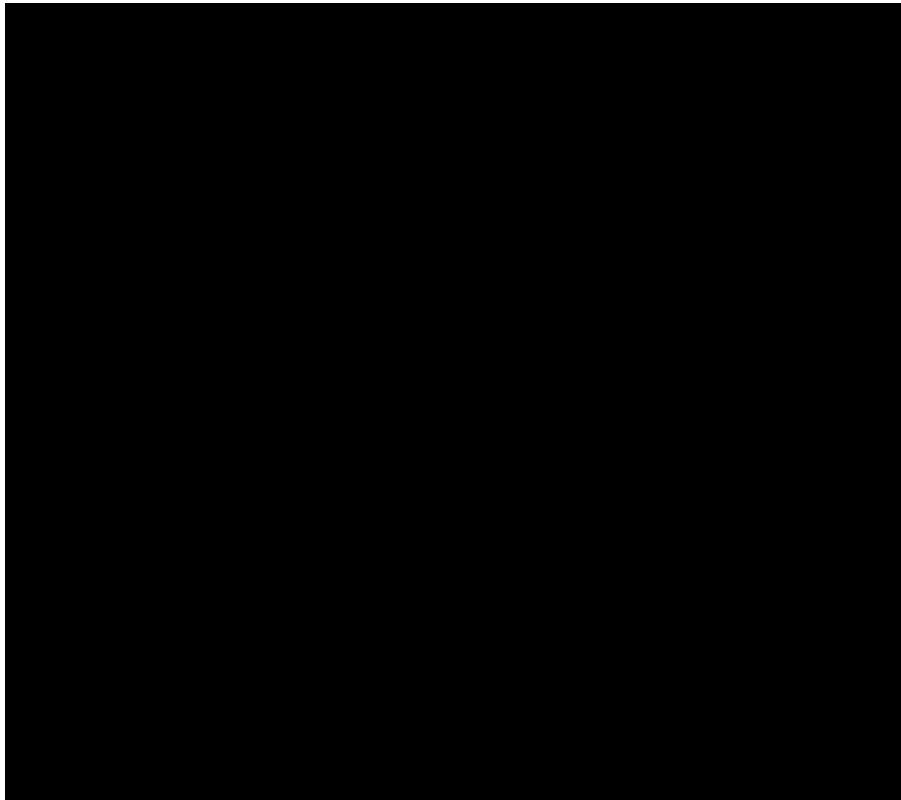




3. When the Send to CaseMap utility launches, select **DfcWYXjb** for the spreadsheet in which you want to import a quote excerpt.



[Related Topics](#)



 Hc WYUH U'bYk 'YI HfUMZfc 'Ub UbbcHJcb

Send to CaseMap Product Integration

Send to CaseMap

Bulk Send to CaseMap

native programs for each of these file types on your computer and including these programs

The default file viewer in CaseMap is Microsoft® Word. To find out if you have additional file viewers set up in CaseMap, click on the Tools menu and click Linked Files, and then click Manage File Viewers on the submenu. The File Viewers dialog box displays a listing of all programs that have been added to your licensed copy of CaseMap3.667(.)30.667()1He remove, and edit file viewers, as well as change the defau()3.992(t)-22.667()18.667(v)8.



attachment link to the corresponding source file stored in your case network folders.

When you are finished analyzing documents and linking to issues and source files, you can sort and search these records to print reports (like the Privilege Log) based on criteria needs.

ient, Description, A **DfJa UfmZjYXg'i gYX'hc HUW JbzCfa Uhcb JbW XY:** Bates - Begin and Bates - End, Date, Type, A similar field types.

DfJa UfmZjYXg'i gYX'hc UbUrnY#WHY[cfJnY JbW XY: KeyDocType, Linked Issues, S Privilege, Producing Party, # Issues, # Facts, among others.

3. Click on the **9`]dg|g** button in the **@jb_YX':]Y**



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

[]b_@ei Yg@cbg@hc@jgi Yg

1. In the **E i Yg@cbg** spreadsheet, click on the question record you want to link to an issue in the Issues spreadsheet.
2. Click on the **=ggi Y@b_]b[** button on the **<ca Y** ribbon to open the ; **a=g**

record.

- [LexisNexis Dossier Suite](#)
- [LexisNexis Expert Research On-Demand](#)
- [Shepard's Citations Service](#)
- [Martindale-Hubbell](#)

Online Research Options

Button and Menu Items	Description
-----------------------	-------------

C f[Ub]nUh]cbg

Shepardizing™ is the practice of using the Shepard's Citations Service to validate a case.

When you Shepardize® a case, LexisNexis provides a report showing every opinion that case has been referenced, all legal treatments of the case, and whether the case is "good law". If the case has been overruled, it is considered "bad law" and may no longer be used as a legal precedent.

To learn more about Shepard's Citations Service, visit [lexisnexis.com](http://www.lexisnexis.com) or contact your LexisNexis Sales Representative at 1-800-227-4328.

[Related Topics](#)

[About linking](#)

Linking related files

Included on each CaseMap file is a folder named "Links".

selected CaseWide bar. The graph also recalculates each time the Facts spreadsheet is refreshed so you can always quickly review current data in the timeline.



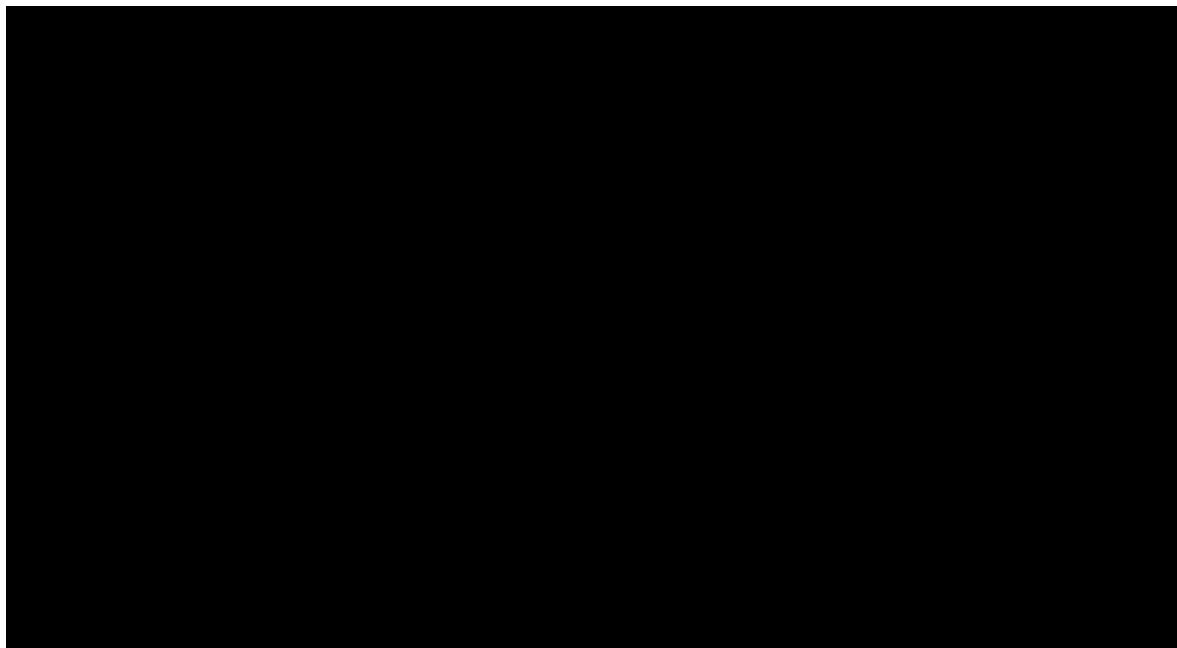
The CaseMap timeline is not available for printing at this time.

FYj]Yk '7UgYK]XYfg'ZYUh fYg

Reference the following table for an overview of how to use CaseWide.

7UgYK]XY'Cj Yfj]Yk

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



6. Click on the **H B 3** button to open/close the graph the date status of

[Creating custom fields](#)

Sorting Data

About sorting

Sorting dptprminps thp ordpr casp plpmnts display in a sprpadshppt vipw, allowing you to rpvipw information in various ways to dptprminp what ibous nppd to bp addrpsspd first or cabourizpd baspd on bp status of ibps. orting is distinct to pach uspr ID and dops not affpct bp vipw bat othprs spp for bis sprpadshpt.

You can also sort mulbplp fipl4 r8.667(i)24(p)-72pd lowi65.6672667(o)-59.667(n)-33.618.667()34.5(b)-25is

Sorting Fields



Hc\WUb[Y\H\Y\Z]Y\X\gcfhcfXYf

1. Open the spreadsheet you want to sort.
2. Right-click on the f8.333el column and select **Gcfh5gWbX]b[** or **Gcfh8YgWbX]b[**.



Sort Ascend8.333ng d8.333splys data from A to Z, last to greatest.

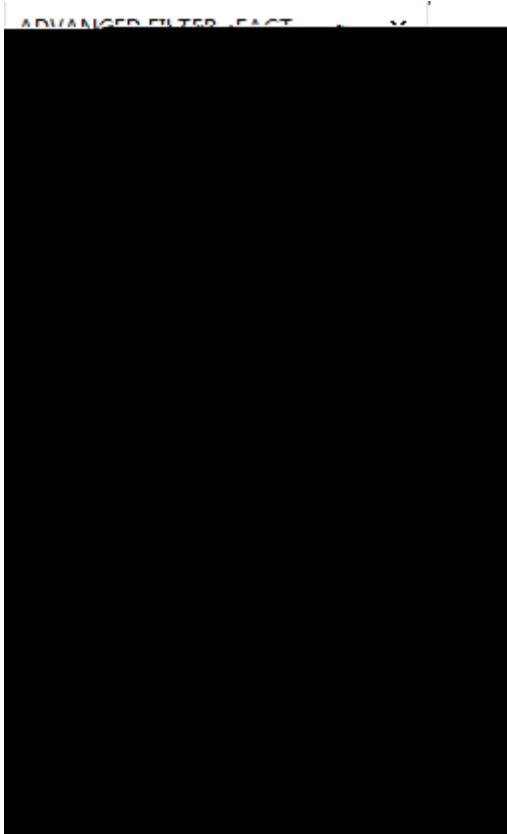
Sort Descend8.333ng d8.333splys data from Z to A, greatest to last.

Note8.333ce that when you change a f's sort order, an arrow d8.333splys 8.333n the coln po8.333nt8.333ng up or down to show 67()18.667(t)-22.667(h)-33.667(e)-70.667()urre

7. Click **C?** to sort the **E i YgHcbg** spreadsheet.

91 Ua d`Yg`cZZ`Hfg`JbWM XY.

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](#)

Performing basic filters

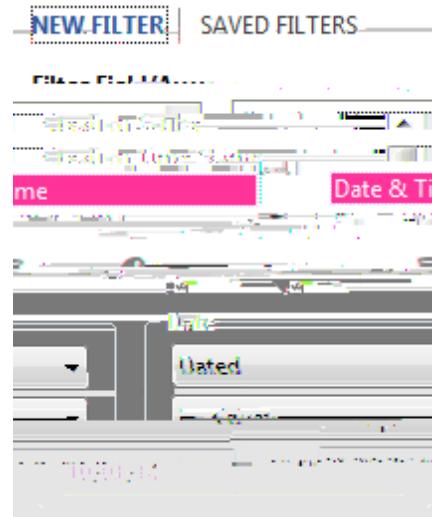
CaseMap has two basic filtering types that allow you to quickly locate a key word or phrases in a field or filter records by type in a spreadsheet.

1. In the **7UgY G\cfHW\hg** pane, click the icon for the spreadsheet you want to use.
2. On the **9X]Hb[** menu of the **<ca Y** tab, click **Gcfh/ :]Hyf**, and then click **5Xj UbWX:]Hyf**.



3. In the **BYk :]Hyf** pane, click **K \Ufig BYk** in the **:]Hyf :]Y^X#5fYU** list.
4. In the **G]bW** field, type the date.

All case records entered on or after 10/03/2017 will be flagged with a red border.



This field is the basis for your filter.

4. In the **8UHY** section of this pane, click **8UHYX** in the first drop-down listing.
5. In the next drop-down listing, click the **1 '9ei U** operator.
6. In the third field, type the date you want to locate.

7. Click the **:]Hf** button  .

Notice that only records that are equal to the date you entered now display in the Facts spreadsheet.

8. To perform a new filter, click the **7UbW` :]Hf** button  .
9. Next search the **8UHY/ Hfa Y** field with a **8UHYX** value of **O '@Ygg#9ei U** and type in a specific date to filter.

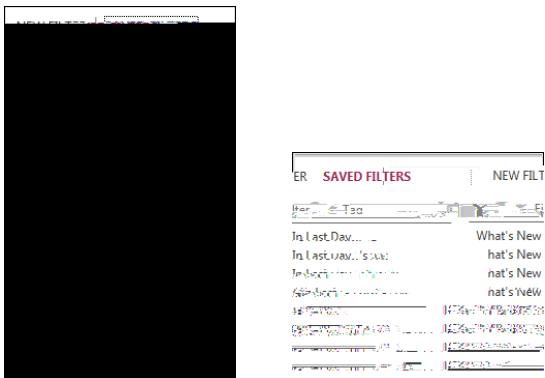
Notice that 67()18.667(t)-22.667(h)-33.667(e)-70.6fact records ar7(h)-33.667(e)-70.6filte to the date you entered.

10. To perform a new filter, click the **7UbW` :]Hf** button  .

11. Next search the **8UHY/ Hfa Y** field for records that still need a date applied to them by selecting **Hc '6Y '8YHfa]bYX** in 67()18.667(t)-22.667(h)-33.667(e)-70.6first drop-down lis

the **GY`YWMcb** field blank. **S** ° **]c** »

Yb **S** °



GUj YX'Z]Hfg'Wb 'VY'UWVggYX'Zca 'H Y'Zc`ck]b[`cWWhcbg.

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

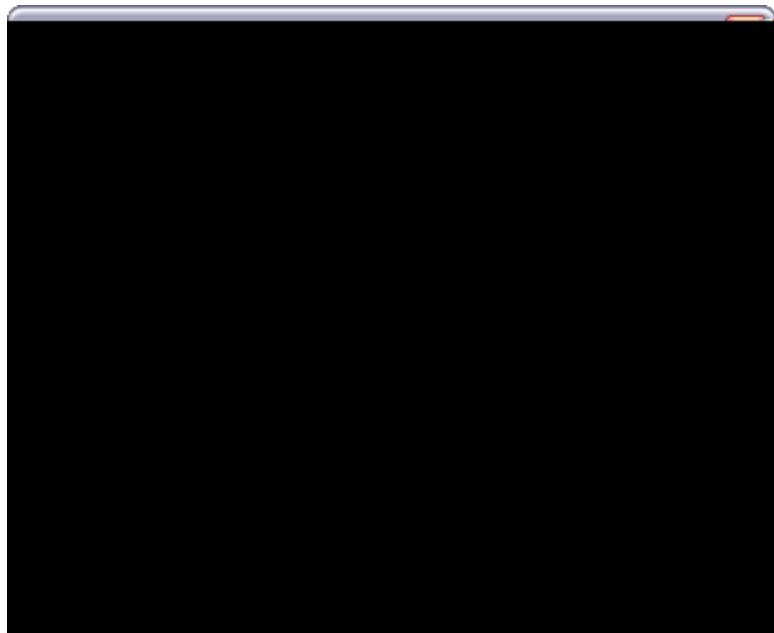
 We recommend that you print copies or make reports of filter criteria essential for trade information regularly. This provides you and other case staff with a quick reference for filters.

Hc'gUj Y'Z]Hfg

1. In the **7UgY'G\cfHWtg** pane, click on the icon for the spreadsheet you want to use.
2. Filter data in the spreadsheet or using the **5Xj UbWX': THf** pane.
3. Click the **GUj Y** button



[About searching](#)





Search Operators Table		
Operator	Query	Results
::	"Descrip tun" :: d tmo[(w)-98.66e	S7(i)24(t)-or[(w)-98.66 form al[(w)-98.66erna

Writing full-text searches

You can search for multiple terms (phrases) that occur in a specified sequence by entering the

 GYUfW]b[\nd\YbUhX'k cfXg

CaseMap indexes hyphenated words as having spaces. This ensures that you can locate

91 Ua d`Yg`cZWYX]hWfX`bi a VYfg]bW XY.

•

3. Clear the

DocManager Overview			
Feature	Description	DocManager Subscription Required	
Navigate search hits	Search hits are highlighted for easy navigation using the Previous Hit and Next Hit buttons in DocManager. The current search hit is highlighted in blue. All other search hits are highlighted in yellow. See Navigating documents .	Yes	CaseMap v10.0+

P75 4 0 0.int annotatic



File Formats	File Extension
General Document and Image Formats	

[Changing DocManager options](#)

 Hc[j]Yk'U'XcWa Ybhcf]a U[Y'Z]`Y



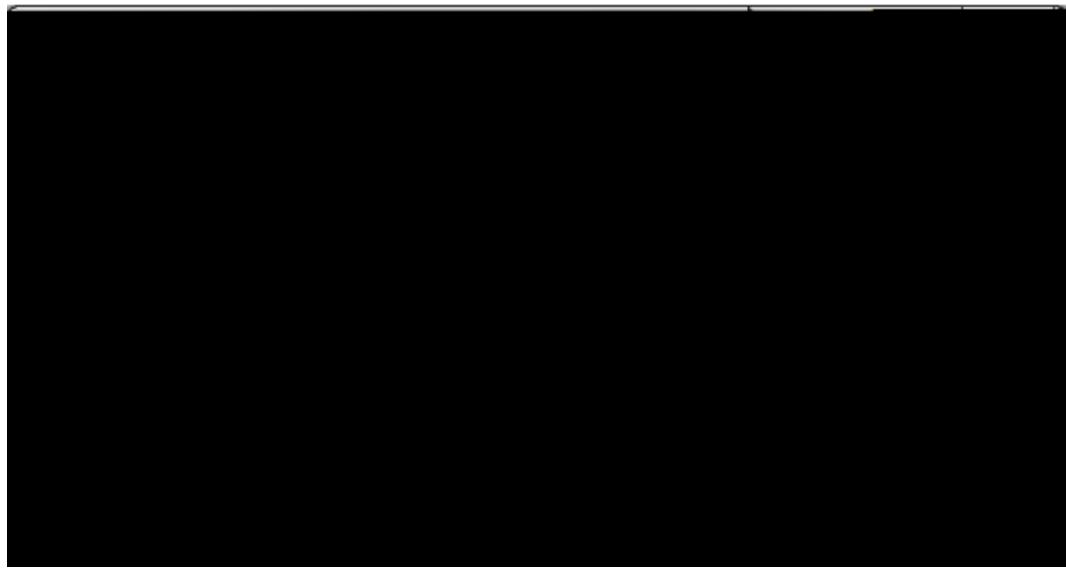
When you click the cogwheel icon  in the View area of the Document

When you click the cogwheel icon





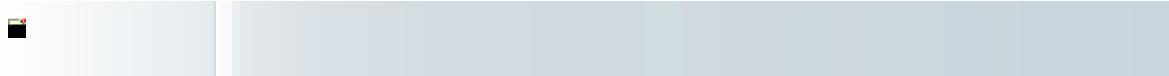
- If CaseMap DocManager is not activated, you will be prompted activate it at the time you're attempting to view a document, or to obtain a trial copy. See [Document production pro](#)
-



5. Optional: Above the <]XXYb':]Y'Xg area of the **8YZjbYJ]Yk g** dialog box, click one of the following icons:

BYk J]Yk

5. When the pointer changes to a , click on drag the pointer to a desired location to increase/decrease the size of the field.



Options.464(e)10 0 1 RG 0 J q 0.75 0 0 0.75 131.2499967 687.7499828 cm 0 0 m 49 0 l h

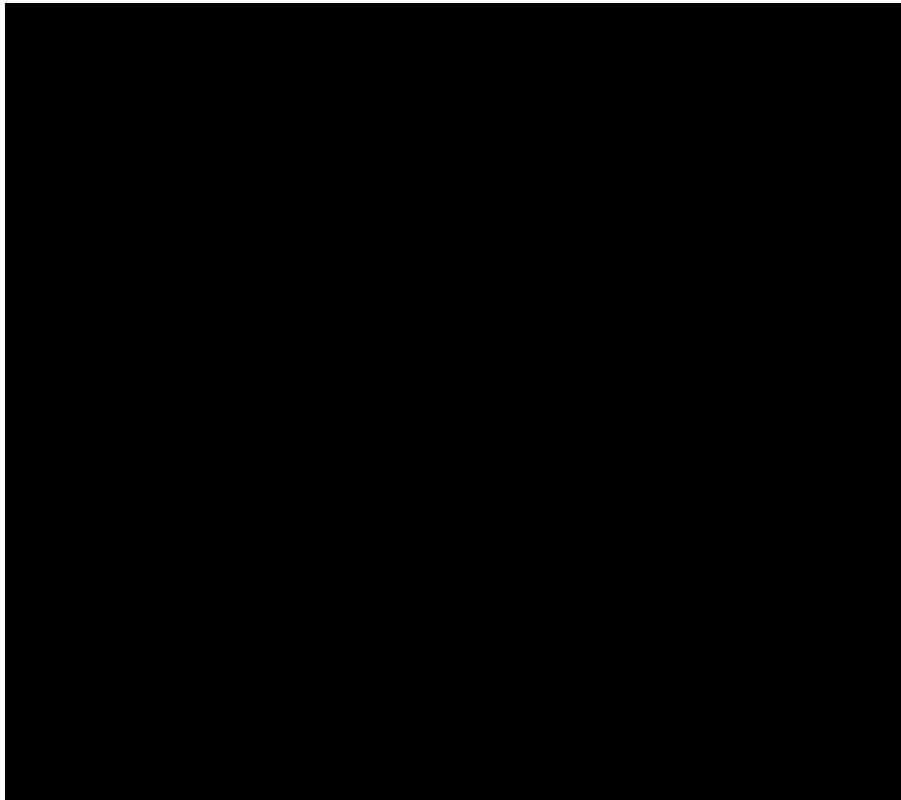
 Hc'fcHJH'U'XcWa Ybhcf]a U[Y

document.

- **GYYWMUf_i dg** — allows you to select an annotation for editing.

When multiple annotations are applied to a document, you can navigate from one to the next using the Next Annotation and Previous Annotation buttons in the Edit Annotation dialog box. See [Editing annotations](#).

1. Open a document in **8cWA UbU[Yf** and click **5bbcHJHY HYI h**



8. In the **FYXUMFYUgcb** area of the **BYk FYXUMcb** dialog box, select a reason for the



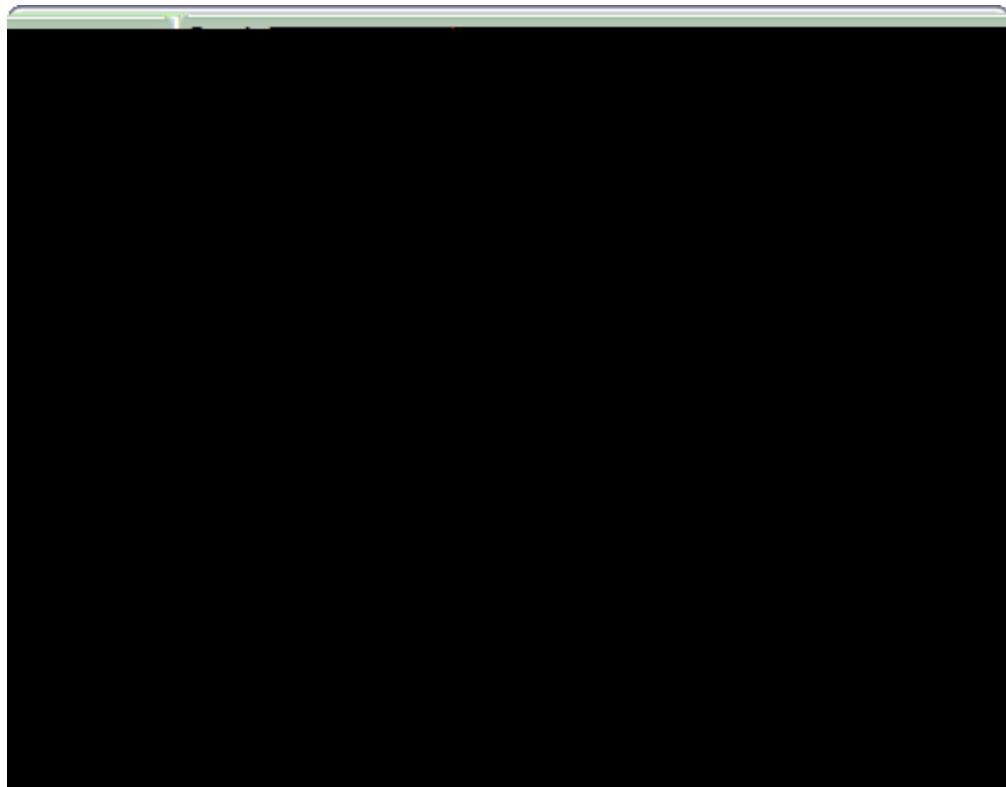
□ :]b X]b ['k cfXg cf d\ fUgYg'Ub X'fYXUW]bY [H]I h

3<0D5 50e 7UgYg'Ub X'fYXUW]bY 563. 667(6)3551690(-26)3338672e670<60.50)30.60 3>8.68P327 D6t

As you navigate to the next annotation, your previous edits or note additions are automatically s7(n)-33.667(a)-65.ed.

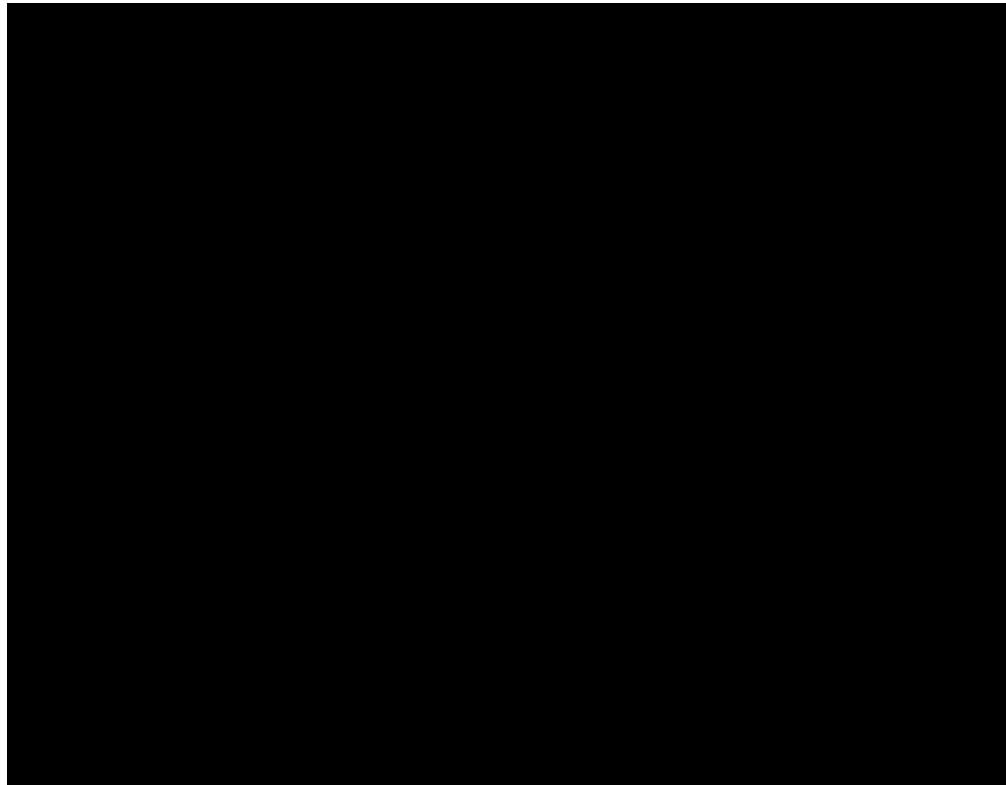
As you navigate annotations, the current annotation is outlined in a rectangle in the document so you can easily locate it.



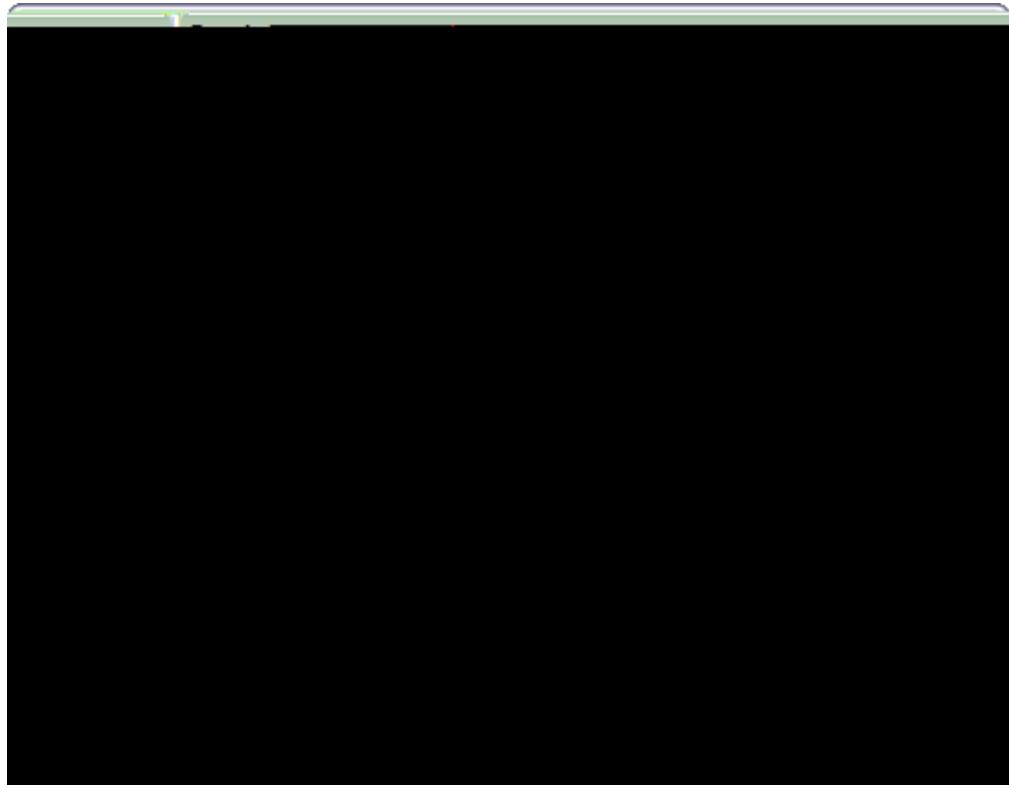


If you want to remove a document from batch, select the document in the Documents to print box, then click the Remove button.

5. Click **BYI h** to continue.
6. In the **8cWa Ybh7cbH\vh7c`cfg** dialog box, select a document content color option:



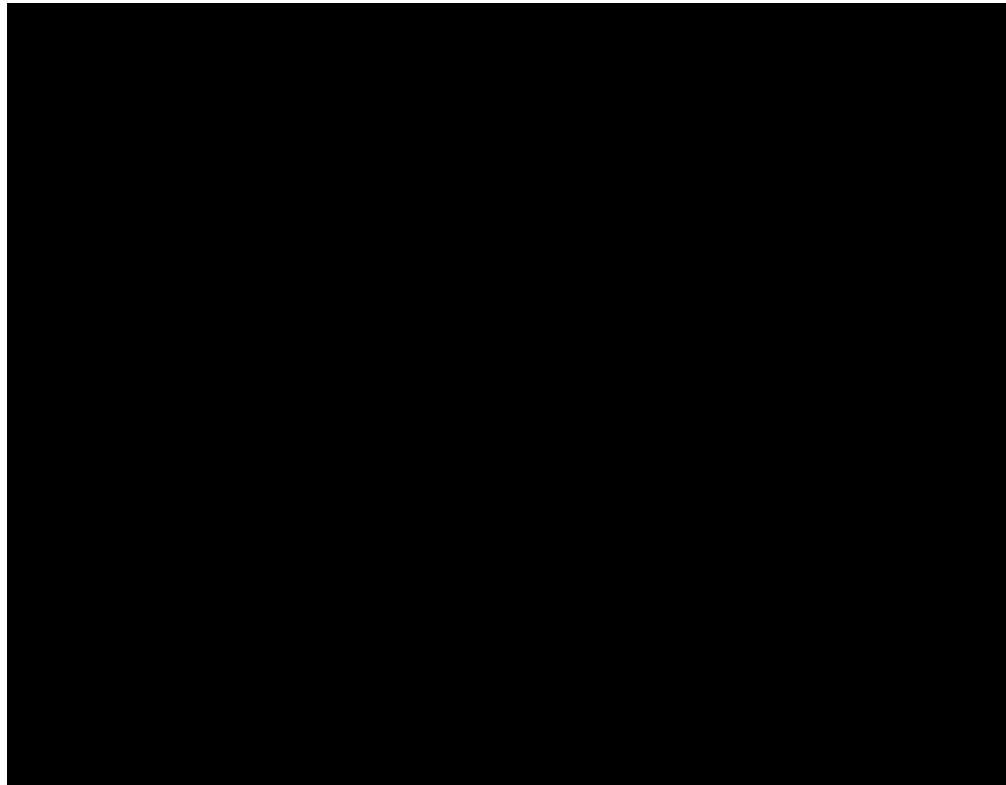
7. Click **BYI h** to continue.
8. In the **5bbcHUhcbg** dialog box, select whether you want to print annotations, and then click **BYI h** to continue.



15. Optional: Click the link [7. View the printed output](#) to review the printed output.

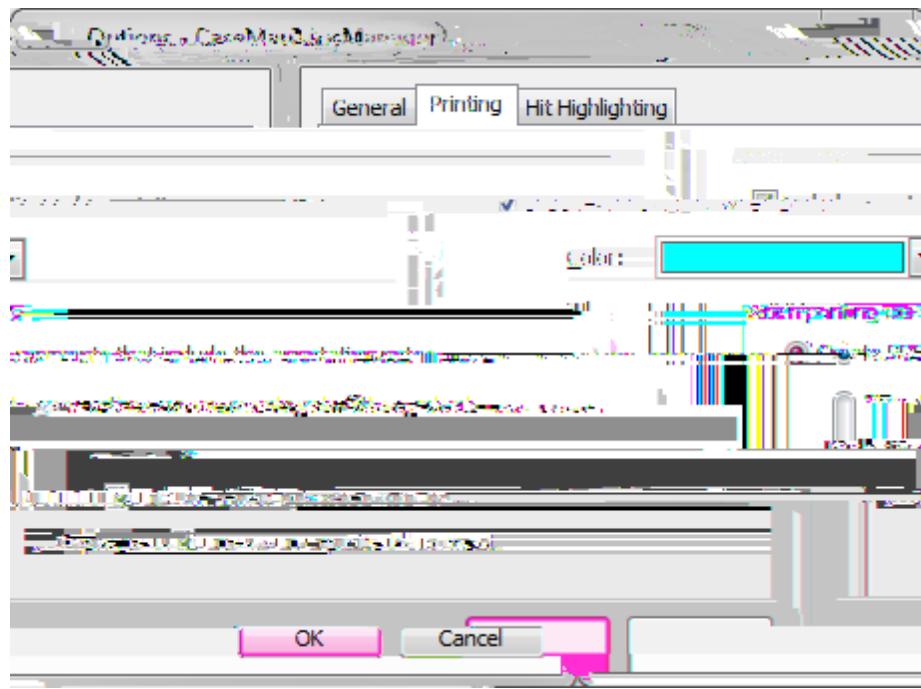
16. Click : **Close** to close the wizard.





7. Click **BYI h** to continue.
8. In the **5bbcHUhcbg** dialog box, select whether you want to print annotations, and then click **BYI h** to continue..

- b. When the **Cdhcbg** dialog box opens, click the **GdfYUXg\YYh**



4. Clear or select the **bW XY Ub bc HJ cbg k \Y b df]bh[b[** check box, depending on your preference.

The default setting is to not include annotations when printing (cleared).

5. In the **7c`cf** list, select the color for which you want all annotations to print.

The default print color Td [(T)32.667(h)-33.667(e)k667r2667(o)-59.-70.667()9(a)-65.6c.6t

Hc`gYbX'UbÜ i hcc_`Ya'Id'7UgYA Ud

2. In **Ci hcc_**, locate the emails to be sent to the case and click the 'Send Email toCaseMap'

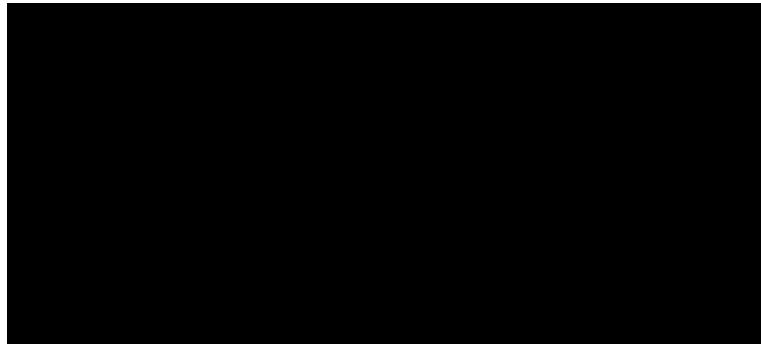


a. Perform the following:

 Double-click the paperclip to open the file in CaseMap DocManager.

6. Optional: In

[Tagging case records](#)



4. In the :]bX'K \Uhfield, type in the text you want to locate.
5. Click either the :]bX':]fghor

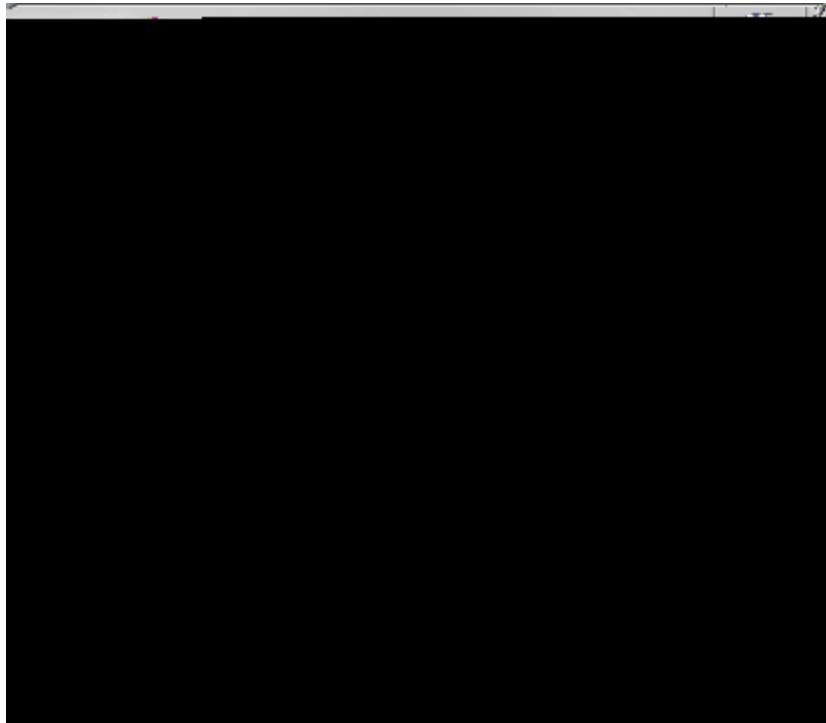
4. Navigate to another cell or record to save your changes.



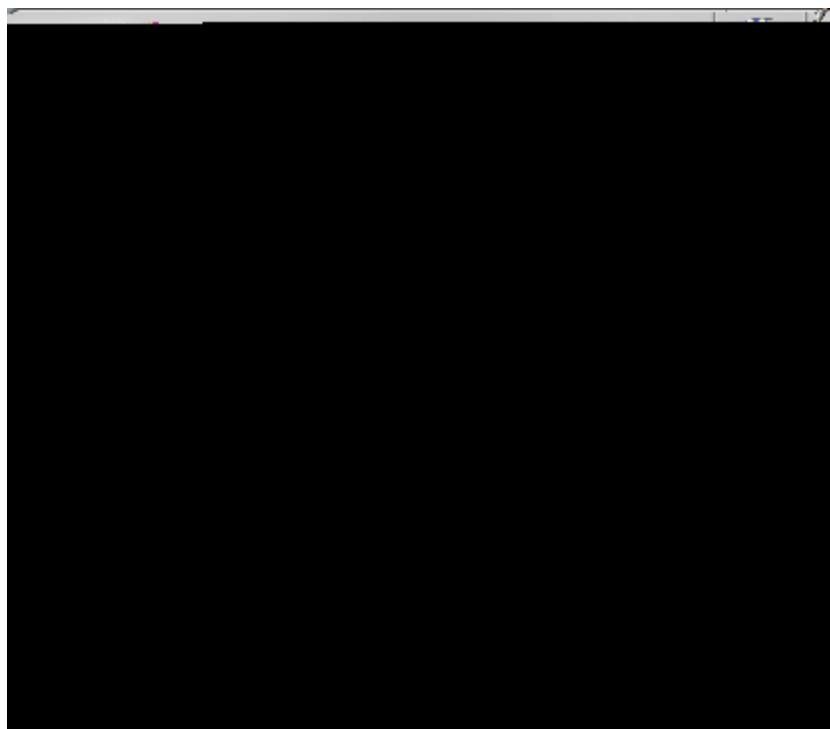
- 6i `_- : JY`X`I dXUHYg

Reporting Options and Considerations

4. Click on the **FYdcfhCdhcbg** tab to adjust the font type and size for both the report title and body text.



5. In the **A]gW`UbYci g** area, select check boxes to include the following options:



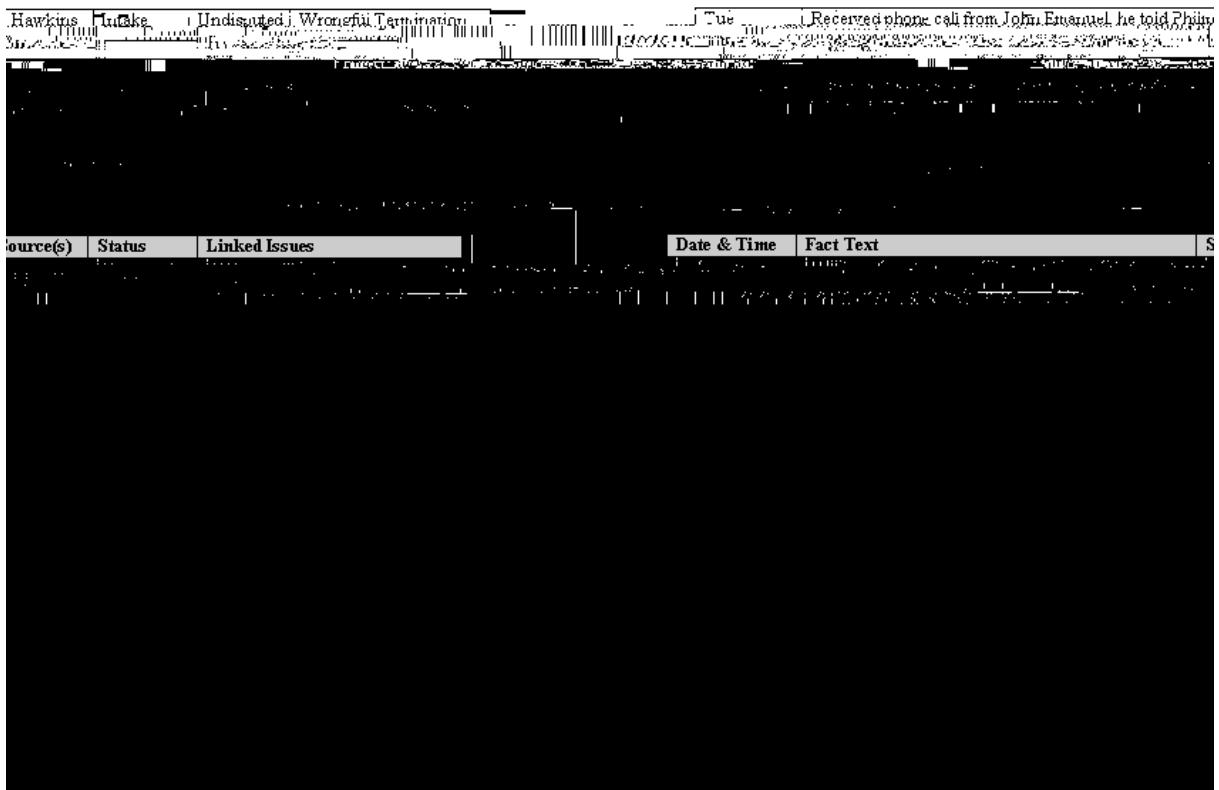
These settings apply to all reports in the case.

12. In the **7cbZ]XYbH]U]lmGG YU]**

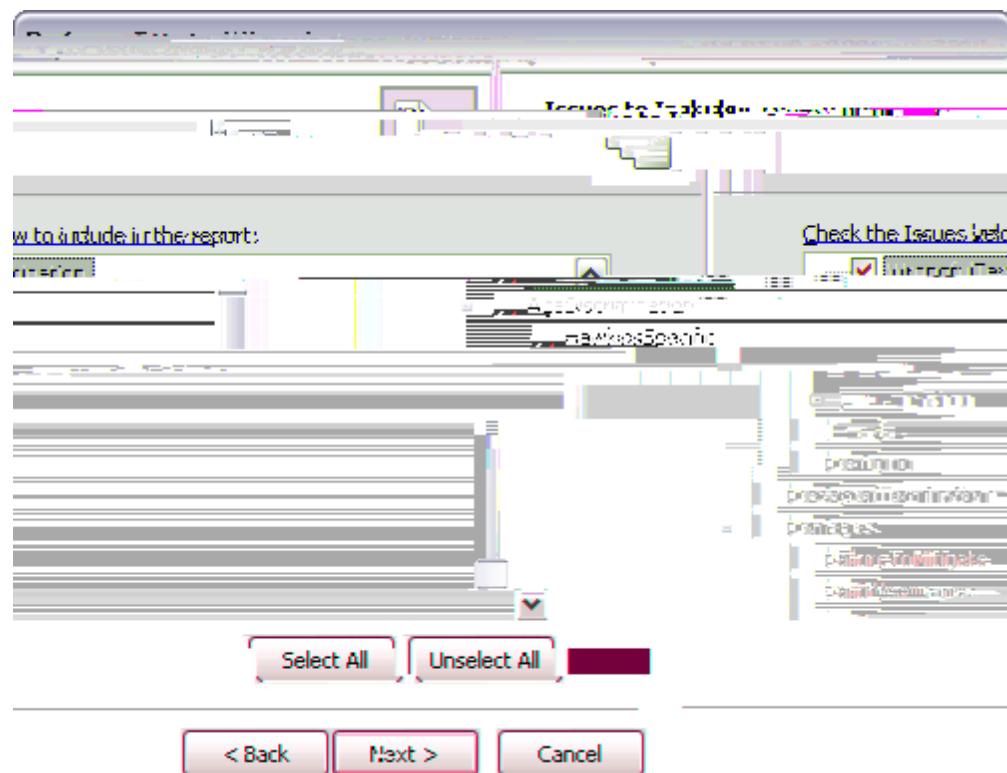
1. In the **7UgY'G\cfHW\hg** panel, click on the icon for the spreadsheet you want to use.
2. Right-click in a record cell to access the filter tools.
3. In the **GY'YW\cb** field type in the text you want to use or select a field status from the drop-down
: **JHf'V** to run the search.

The spreadsheet now displays only those records that meet the selected search criteria.

Notice that th.67()1870.66(a)-65.667()18.667(f)18.667(i)24(e)-70.667(l)2 rt now dd type
in the text you want to use or select a file status from the

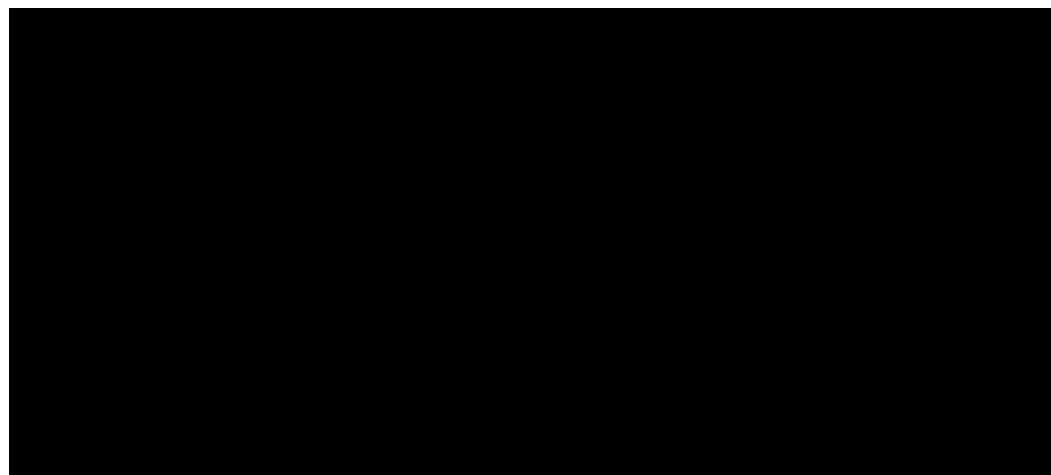


[Hc'df\]bhU'6m=ggj Y'fYdcfh](#)



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

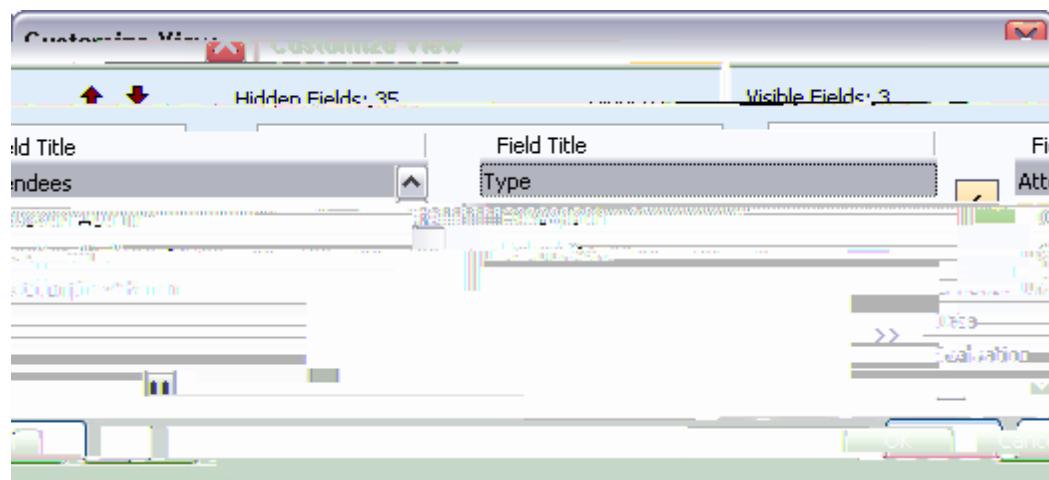
Click the Customize button to add fields to the Visible Field listing, then click OK.



You can now save the report as a Word file or PDF file, and folder where you store reports.

[Related Topics](#)

2e When the **6mCV^YVhFYdcfhK]nUfX** launc07<003A>51.75 cm 0 35 9-e



Printing a Search ReportBook

fields, sort order, filters, groups, and print options for the report. Click the Rename button to change the report name within the ReportBook.

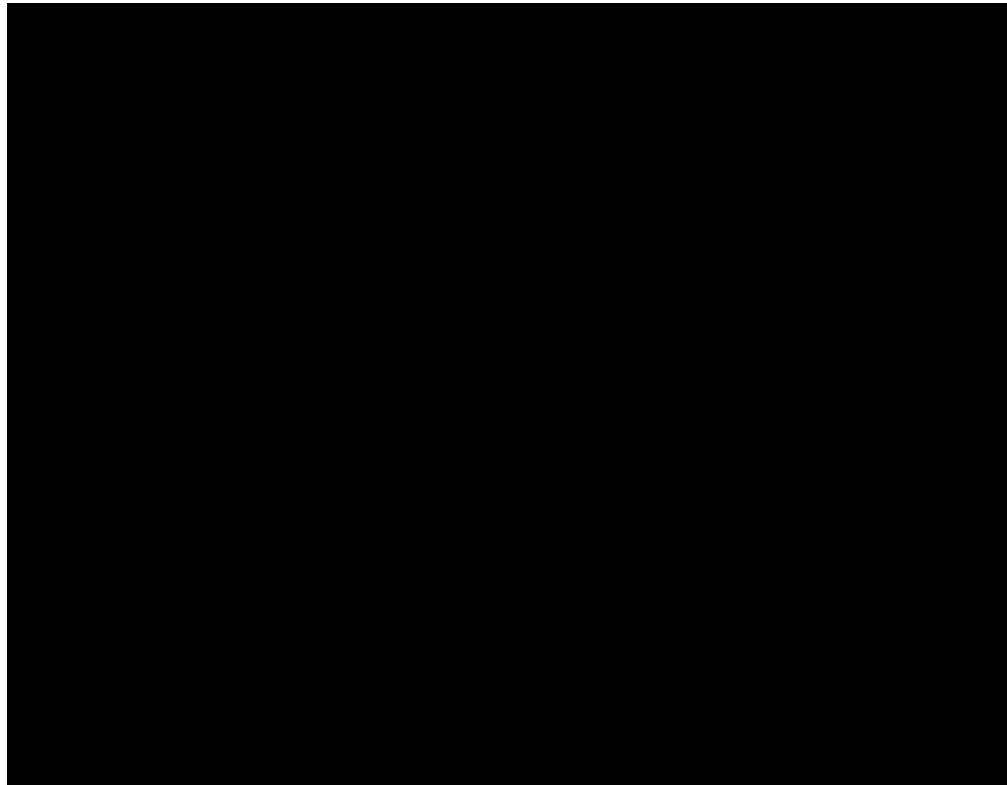
3. Click **C?**

Hc`df]bhU`@]b_YX`:]Y`HYI h<]hg`F Ydcfh

The report displays in DocManager with an Attachments pane listing the linked files. For each linked file listed an icon indicates its file type and the number of search hits displays to the right of the file name. Each linked file's folder path displays at the top of each file tab. The search

click Copy.



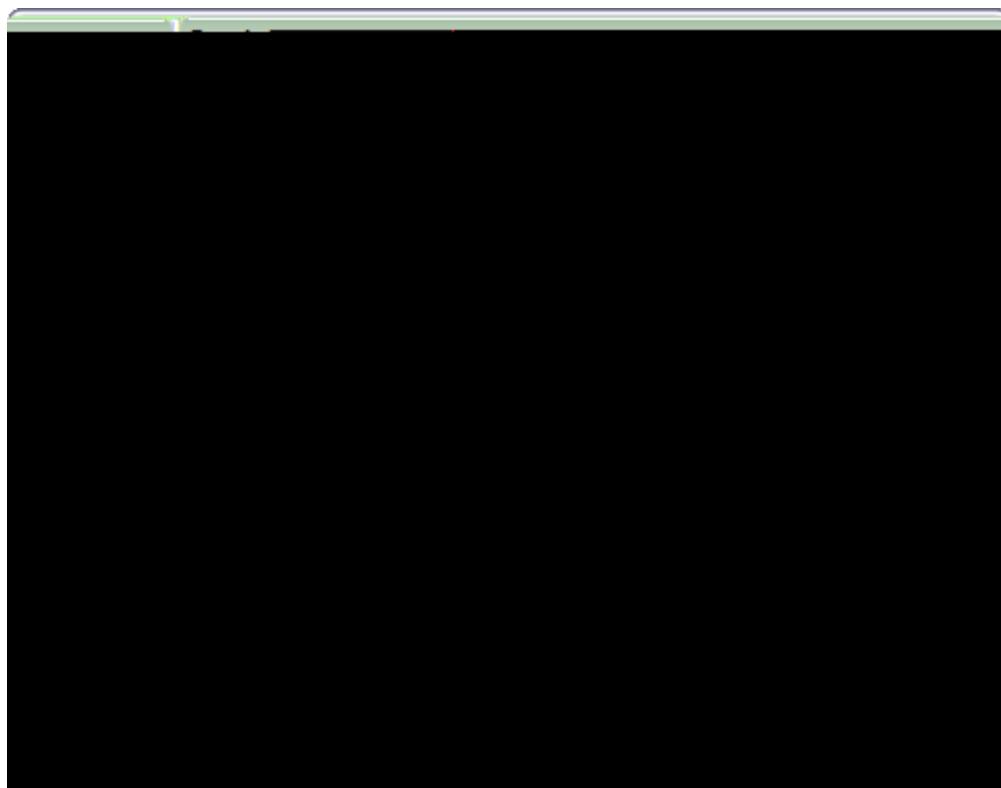


7. Click **BYI h** to continue.
8. In the **5bbcHUhcbg** dialog box, select whether you want to print annotations, and then click **BYI h** to continue.

 **Hc 'VUHW 'df]bh'hc 'D8:**

1. On the **FYdcfhg** menu, select **6UHW 'Df]bh** and then click **Hc 'D8:** .
2. When the **6UHW 'Df]bhK]nUfx** launches, click **BYI h**
3. In the **FYj]Yk '8cWa Ybhg** dialog box, review the documents you want to print from the current spreadsheet.

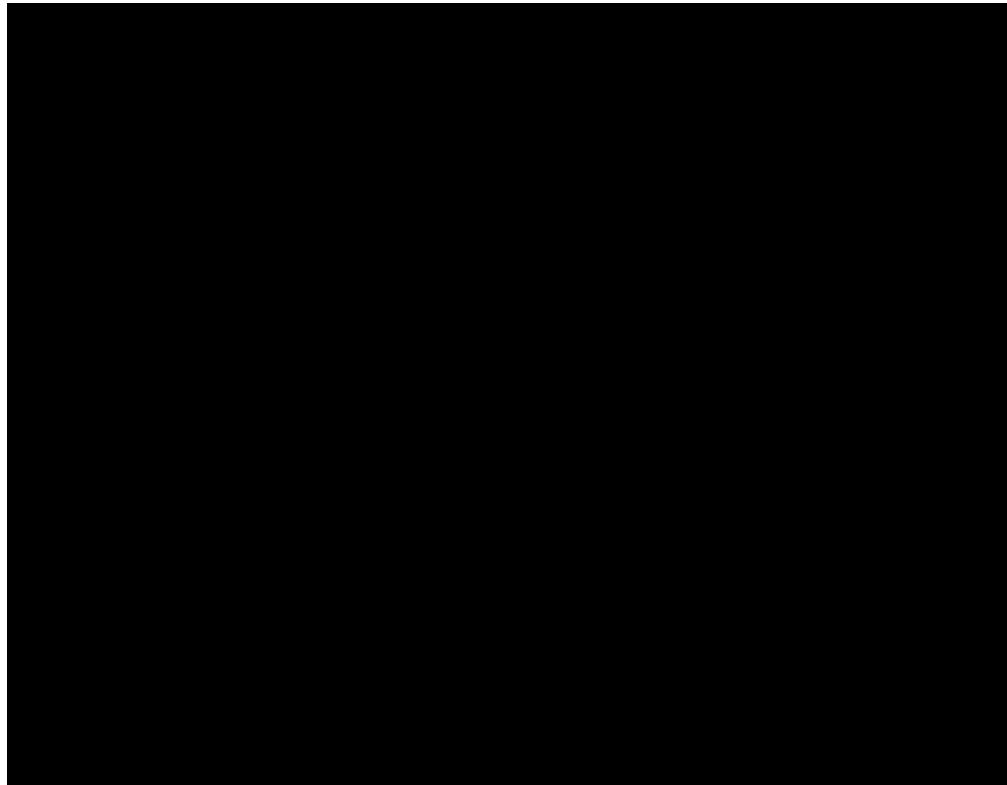
15. Optional: Click the link



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

5. Click **BYI h** to continue.
6. In the **8cWa Ybh7cbH7c`cfg** dialog box, select a document content color option:

I gY'K Y'cf][]bU'XcWa YbhVebH7bH'W'cfg
7cbj YfhU'`cZK Y'XcWa YbhVebH7bH'W'cfg'hc'[fUngW'Y
8]gd'UmhVI h]b'K Y'XcWa Ybh]b'V'UW'

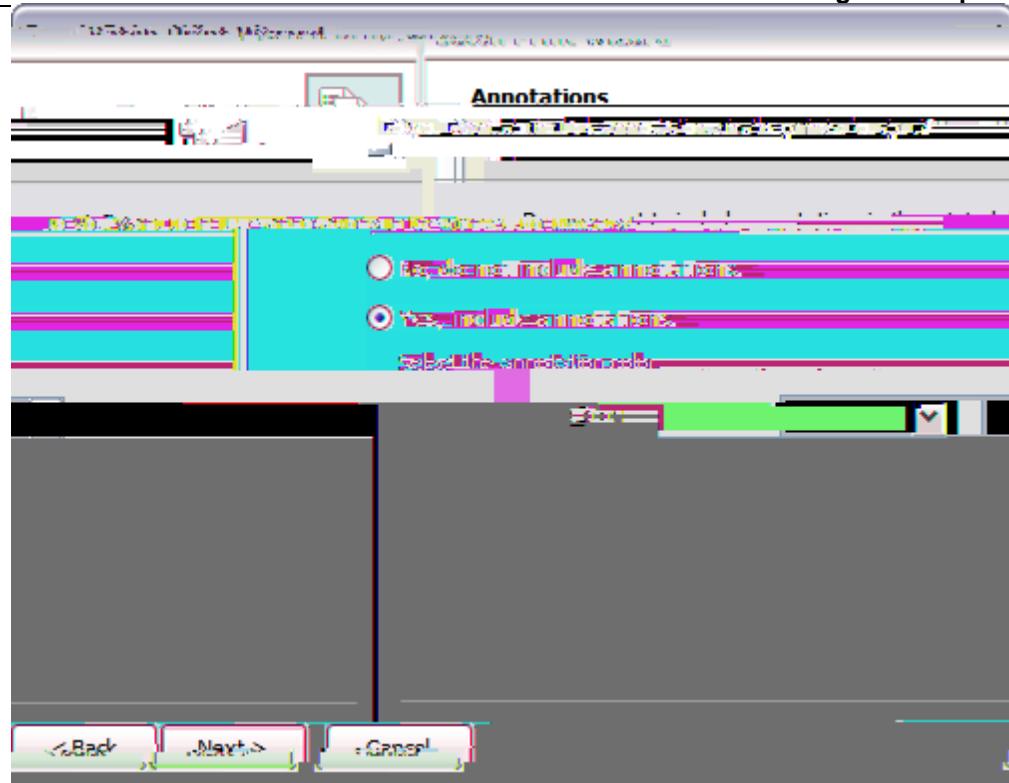


7. Click **BYI h** to continue.
8. In the **BlackHittingDate** **fr&g3f~P6gL!Cf}C33fsgg\$¥-g3fwS6gS6gu"fu-gf{ P&g\$ft6gg\$¥**

13. Optional: Click the link

> Batch Print.

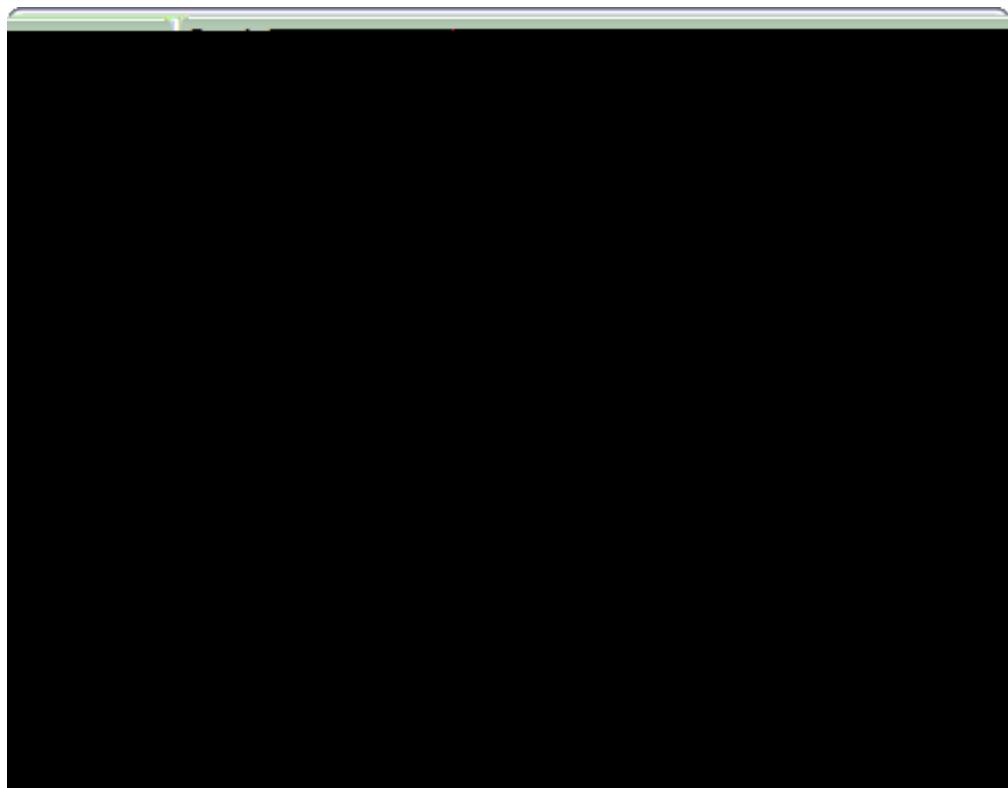




If Yes, click on the color for which you want annotations to print in the Color list, and then click **BYI hto** continue.

- g. In the **Ci hdi h8Yg1bUh]cb** dialog box, select the printer you want to use in the **Df]bHf** list.

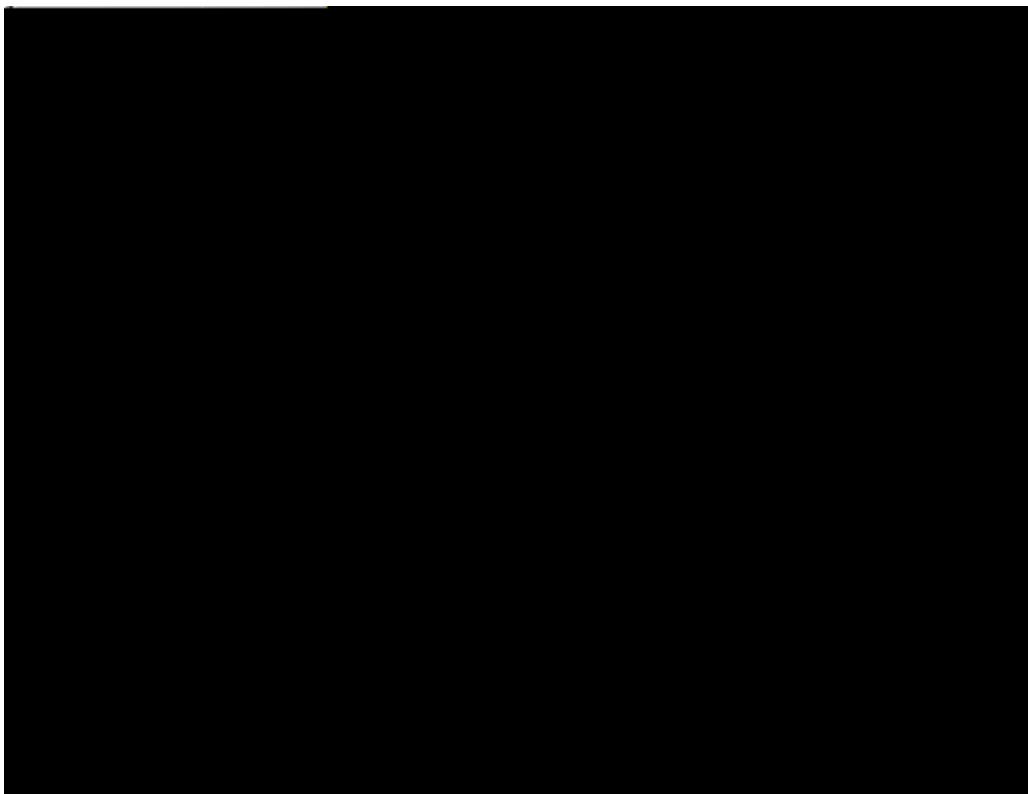
C 2017 Lexi59.0.727(s)-45.455(N59_273(e)10.545(y)-45.464(i59.0.718(s)-45.464()5.273()5.282(A)30.636(I59.0.727(I59.0.727



If you want to remove a document from batch, select the 17.538(7)17.538(5)]TJ ET

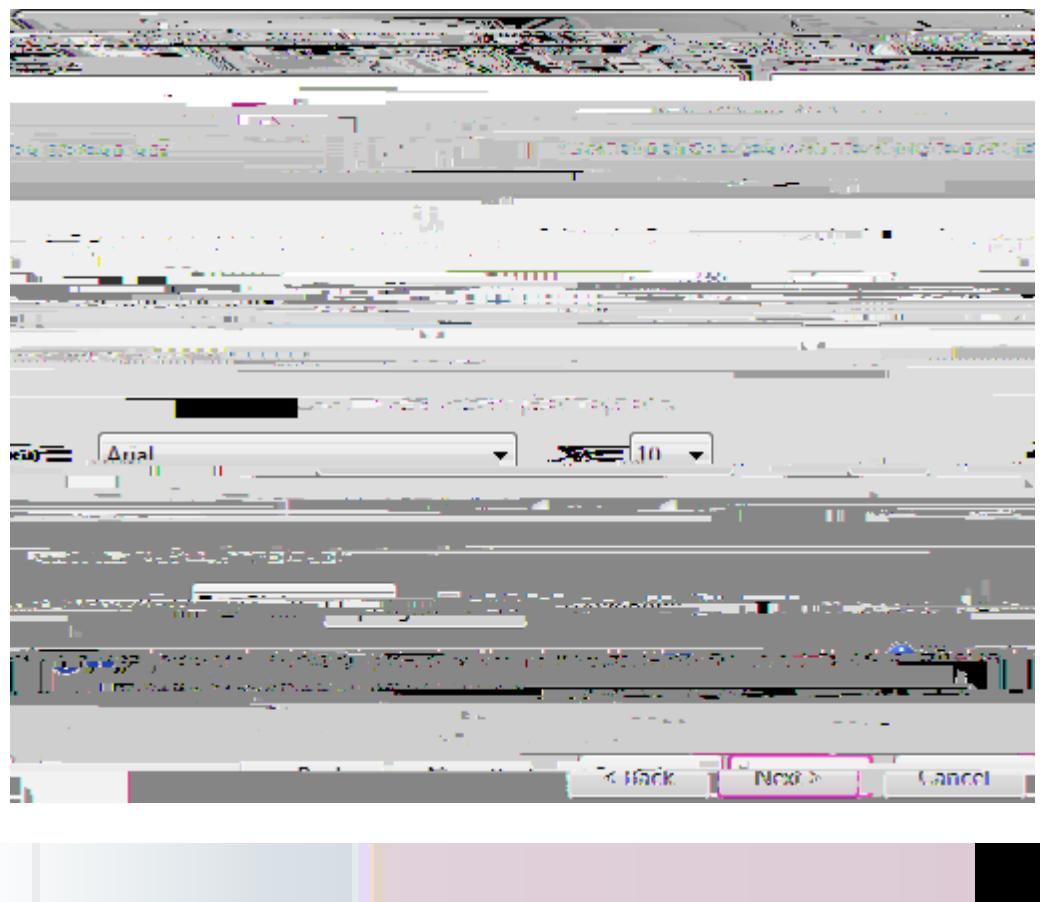
batch print operations

- [create a PDF copy](#)



3. In the **8cWa Ybhg'hc'=bW XY** dialog box, select the documents to be used in the production set using one of the following options:

a. In the



GUj YX': JHYf

a. In the

The Producing documents dialog box displays.

18. Please wait while the selected documents are processed.

The Completing the Document Production Wizard Completion screen displays. dialog box displays.

19. Perform one of the following:

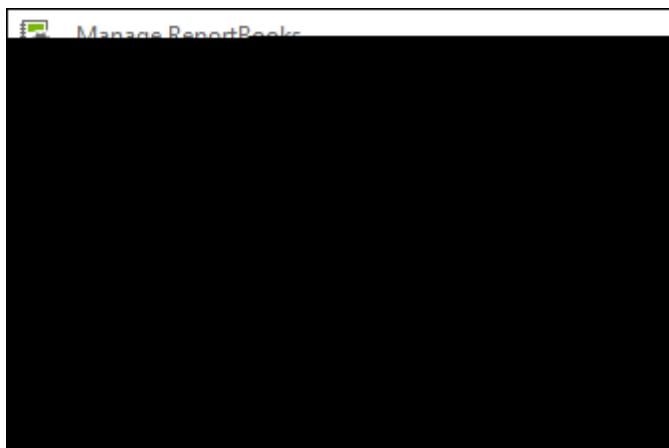
Optional: In the **7ca d'YHb['H Y'8cWa YbhDfcXi Wjcb'K]nUfX'7ca d'YHcb** dialog**]b]g**.

-or-

Optional: In t

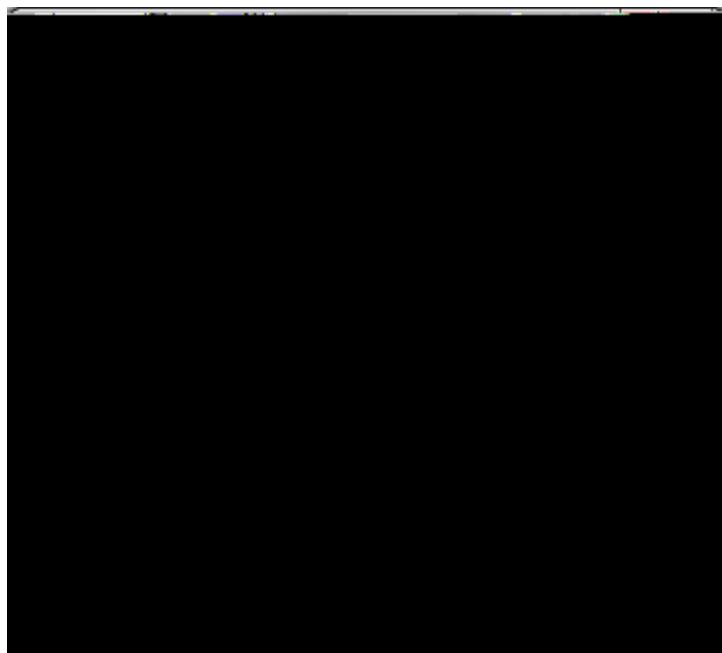
Related Topics

[Batch pr\[\(d\)-nting l\[\(d\)-nked documents](#)





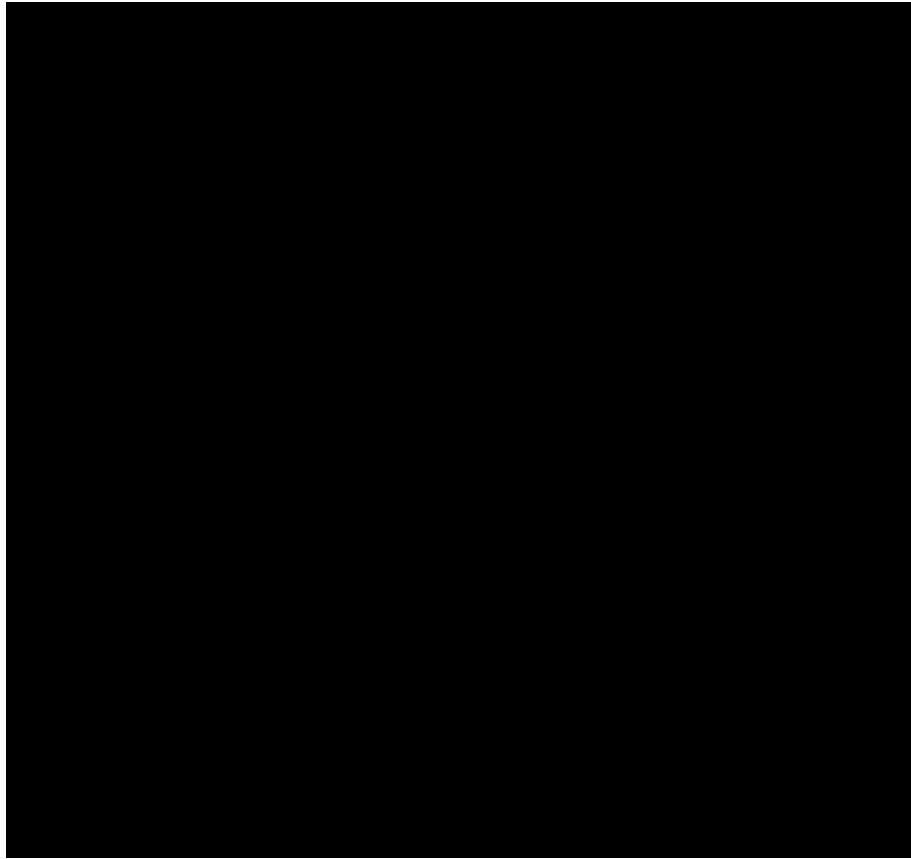
5. In the **9XjhF Ydcfhcc_ -bhfcXi Wicb** dialog box, modify additional preferences in the **GYHjb[g** area that you want applied to the int7(r)10.333(e)-70.67522.667()18.66



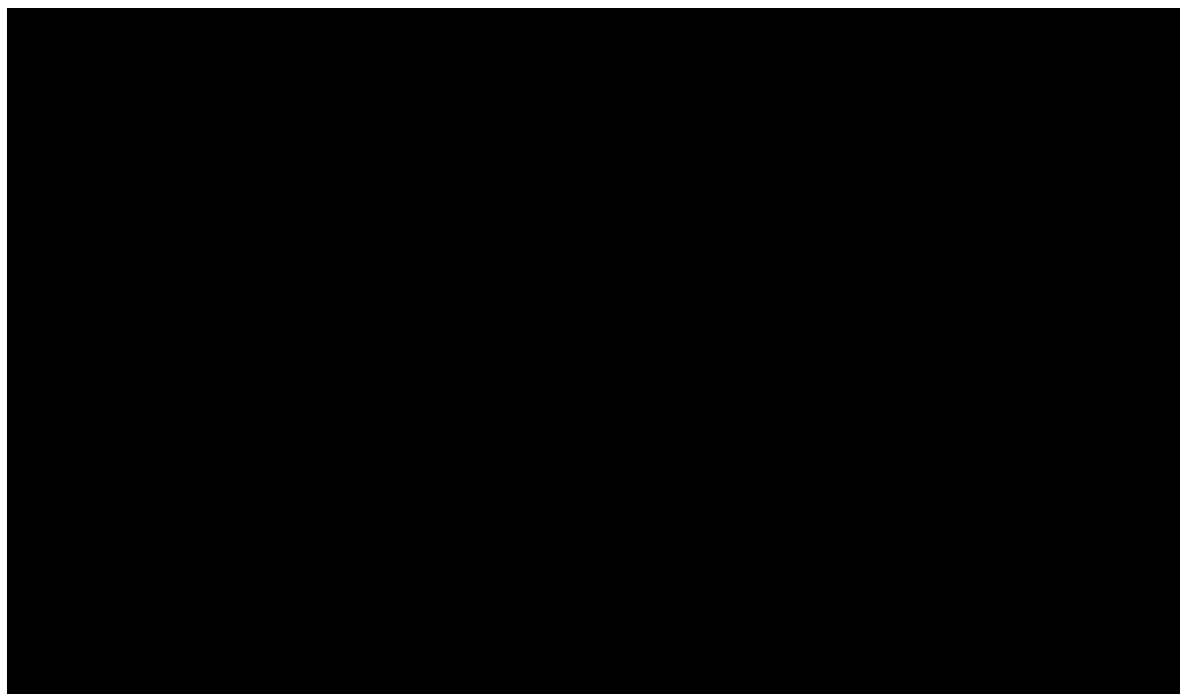
For more information, see [Sorting multiple fields](#).

15. **Hc 'UXX 'U'ZJ'Hf**

In the **9XjhFYdcfh** dialog box, click the **Add filter** button to add/remove a spreadsheet filter, then click **OK**.



1. In the **7i ḡca JnY F Ydcf h̄cc** dialog box, click the **7cbZ'ḠHJH̄a Ybh** button.
2. In the **9XJhF Ydcf h̄cc_7cbZXYbhU]hmḠHJH̄a Ybh** dialog box, select the **9bUV'YX**



Exporting Data

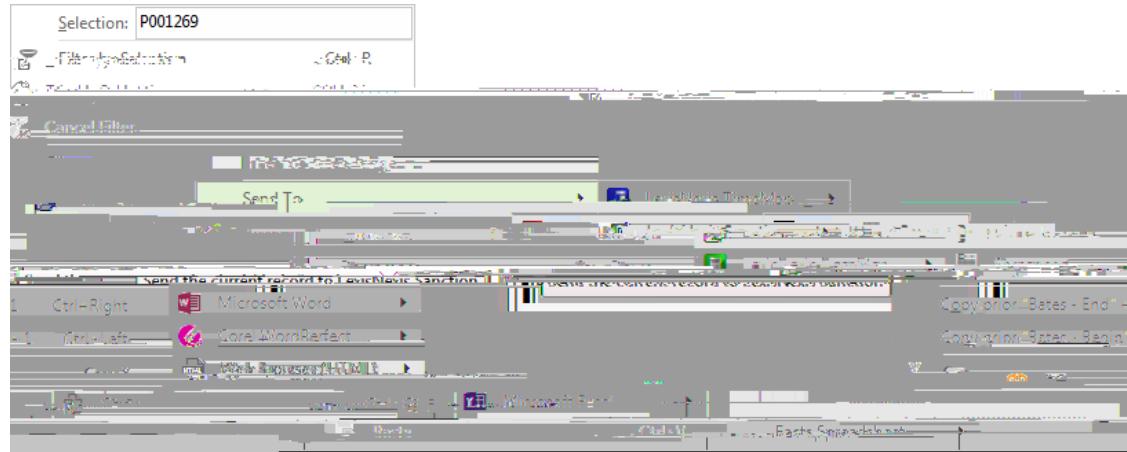
About exporting data

CaseMap allows you to extract case data to save in a variety of file formats, such as .rtf, .exp, .rt, .an, .7z, and .75, directly into another application like Microsoft® Excel or Adobe® Acrobat, or into a companion program.

91 dcfhXUHJhc h Y Zc ``ck Jb[hYI hZ] Y Zcfa Uhg.

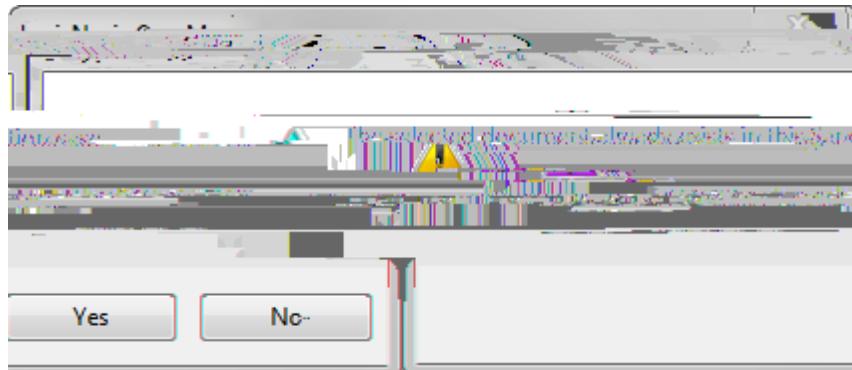
3. In the

Sanction, and then click the Send To > LexisNexis Sanction > Current Record.



=ZH Y XcWa Ybhk Ug'dfYj]ci g'mgYbhk 'GUbWicb

If the document was previously sent to Sanction, the following dialog message is displayed.



Perform one of the following to continue:

8cWa Ybhg) to open it.

3. Opti67(o)-59.6nCVYMe! 8cWa Ybhg





Keyboard Shortcuts: Spreadsheet Views

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