Using TextMap

User Guide

TextMap®, Version 9.1

- Navigating TextMap
- Getting Started
- Working with Cases
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LexisNexis®

TextMap User Guide

CaseMap®
CaseMap® Server
TextMap®
TimeMap®
NoteMap®
DepPrep®
Sanction®
Concordance®

Version: TextMap® 9.1
Release Date: February 28, 2017

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About TextMap

Chapter

1

About TextMap

TextMap transcript management software helps you easily manage your transcripts in an electronic format. Each electronic transcript you import — case deposition, examination or other proceeding — to TextMap is created as a database so you can efficiently search, annotate, add notes, create summary reports or cull key transcript passages.

Share care access to ensure efficiency

TextMap cases can be used by multiple case staff — at the same time. The case created should be stored in a shared location on your network to ensure that all users can access it. In this manner, all case users are able to work together to reviewing, searching and annotating transcripts.

Get started using TextMap

To get started using TextMap, we offer a variety of resources for you to familiarize yourself with the software:

- You can safely experiment with TextMap's features using our example case, Hawkins vs Anstar.
- You can print the TextMap Quick Reference Card.
- You can follow the steps in the Quick Start Tutorial to create your own practice case or start a new one for a client.
- You can also sign up for TextMap On Demand training and learn how to use TextMap's primary features in a guided web-based training course that you can take at your own pace. Visit the LexisNexis University to register online today.

Learn what's new in TextMap

TextMap continues to bring new and exciting features that make it work smarter and harder. Take time to review recent release updates and familiarize yourself with the new tools and features that give you an advantage in transcription management.

For more information, see What's New in TextMap.

Related Topics

What's New in TextMap
About the Getting Started pane
Practicing with sample data
Using the Quick Start Tutorial

What's New in TextMap

Chapter

2

What's New in TextMap

The following enhancements are included in the TextMap version 9 release.

TextMap 9.0

Include source when copying transcript text

TextMap now provides a new clipboard option to include the citation source when copying transcript text.

See Copying data for additional information.

Enhanced video clip export to PowerPoint

TextMap has added new video output options for users to export video clips to multiple formats and positions.

See Exporting video clips for additional information.

Bulk link exhibits to selected transcript

TextMap now provides a way to bulk link new or existing exhibits to the transcript.

See Linking exhibits to transcripts for additional information.

Redact sensitive information from transcript text

TextMap now provides a redaction tool to redact confidential and sensitive information.

See About redactions for additional information.

Create annotation from partial transcript text

TextMap now provides a way to annotate partial lines of a transcript. See Creating annotations for additional information.

Export video clips to MP4 format

TextMap now provides a way to export video clips to MP4 format. See Exporting video clips for additional information.

Import PDF transcripts

TextMap has added an option to import pdf transcripts. See About importing data and Importing transcripts for additional information.

View annotation linked issue color bars in transcript viewer

TextMap now provides a way to easily identify issues coded for annotation within the transcript text. See About annotations and Creating annotations for additional information.

For more release information, see the Release Notes.

Related Topics

About TextMap
Release Notes

Using TextMap

Chapter
3

Using TextMap

Navigating TextMap

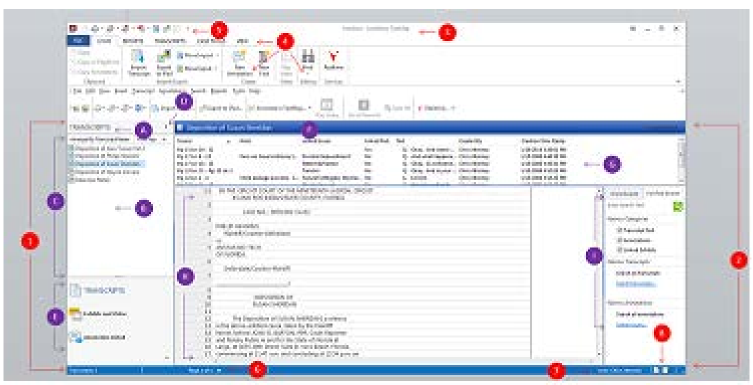
Navigating TextMap

TextMap's user interface is designed so your transcript data displays in the primary workspace pane (2) for maximum viewing. This workspace pane (2) is where you will search transcripts, enter and track annotations, issues, notes, linked exhibits and documents, and review video depositions in individual transcripts. To move quickly between each transcript, you will use the Navigation pane (1) on the left side of the application. The Navigation pane (1) has three interchangeable panes: Transcripts, Exhibits and Video, and Annotation Detail. Each pane is then divided into task panes containing different tools for working with transcripts.

When you are working in a case, use the Transcripts pane to access transcripts. In the Exhibits and Video pane, you can view video depositions, link exhibits, and view linked exhibits and other documents. Use the Annotation pane to review an annotation's properties, notes, and linked issues, as well as send facts to CaseMap, review linked CaseMap fact details, and open linked CaseMap facts in CaseMap.

Use the Search pane to run basic keyword searches and full-text searches. The Full Text Search tab allows you to narrow your search by categories and limit your search to selected transcripts and/or case issues.

The tools you need to search, sort, edit, and analyze data as well as create reports are primarily performed by clicking on the ribbons or clicking on commands in the TextMap drop-down menus. All administrative tasks are located on TextMap menus.



You can print a hard copy of the TextMap user interface and number key by printing the TextMap Quick Reference Card.

To view the number key

1. **Navigation Pane**

   The Navigation pane runs vertically along the left side of TextMap and provides access to three different panes: Transcripts, Exhibits and Video, and Annotation Detail. Click on the buttons at the bottom of the Navigation pane to access each set of tools.

A. Task Pane Name

Displays the name of the pane that is currently open in the Navigation pane.

B. Transcripts Pane

Contains the names of the transcripts imported into the TextMap case. Displays at the top of each pane. Transcripts can be sorted by name, transcript date, or import date, and can be sorted in ascending or descending order.

C. Task Pane

Displays task panes for performing tasks specific to the selected pane. For example, the Exhibits and Video pane contains the Exhibit Tasks and Exhibits task panes.

D. Minimize

Allows you to minimize the Navigation pane to expand the Transcript window for better viewing.

E. Navigation Buttons

Opens the task panes available within the Navigation pane.

2. Workspace

Displays the case transcripts, annotations, and the Search pane.

F. Transcript Name

Contains the name of the transcript currently selected in the Transcripts pane.

G. Annotation Pane

Lists the annotations within the transcript currently selected in the Transcripts pane.

H. Transcript Window

Displays the transcript currently selected in the Transcripts pane.

I. Search Pane

Allows you to run keyword searches and full-text searches on transcripts within a case. Contains the Word Search and Full Text Search tabs.

3. Title Bar

The Title bar displays the name of the case currently open in TextMap.

4. Ribbons

The Ribbons (Home, Reports, Transcripts, Case Tools, and View) contains menu items and other commands for performing TextMap tasks.

Two additional ribbons (Text & Video Tools and the Search Tools ribbons) contains menus and buttons for Annotation management, and for opening and navigating search hits. See About TextMap menus for additional information.

5. **Quick Access Tool Bar**

   The TextMap Quick Access toolbar can be customized to add and/or remove buttons/ functionality. By default, the toolbar displays the most commonly used buttons.

> The Quick Access Toolbar can be displayed above or below the TextMap ribbon by selecting the 'Show Quick Access Toolbar Below the Ribbon' option when customizing the toolbar.

6. **Transcript Status Bar**

   Displays transcript status information, such as the current transcript and page count, and the current cursor location within the Transcript window.

7. **Case Staff User**

   Displays the name of the user currently logged on to TextMap.

8. **Index and OCR Status Icons**

   Displays the current indexing and optical character recognition (OCR) processing status.

Related Topics

About the Navigation pane
Modifying Navigation pane display
About TextMap menus

About the Navigation pane

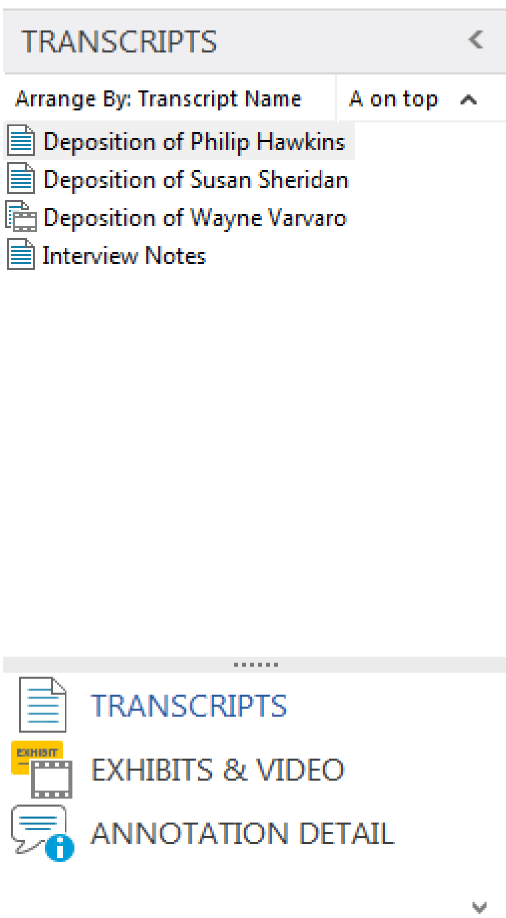
The Navigation pane is a vertical pane located on the left side of your screen when you open a case in TextMap. TextMap's Navigation pane has three task panes. The default setup is to display the Transcripts pane. The Transcripts pane allows you to easily transfer from working in one case transcript to another. The Transcripts list is displays at the top of each pane.

TextMap's Navigation Pane	
Elements	**Description**
Transcripts	Use to navigate between case transcripts in TextMap.
Exhibits and Video	Use to navigate between case transcripts in TextMap, view videos synchronized with transcripts, link exhibits to transcripts, and view exhibits

TextMap's Navigation Pane	
	and other documents linked to the selected transcript.
Annotation Detail	Use to review the selected annotation's properties, notes, and linked issues, edit the selected annotation, send facts to CaseMap, review linked CaseMap fact details, and open linked CaseMap facts in CaseMap.
Arrow Button	Use to show/hide pane buttons to maximize viewing within the Navigation pane.

Transcripts pane

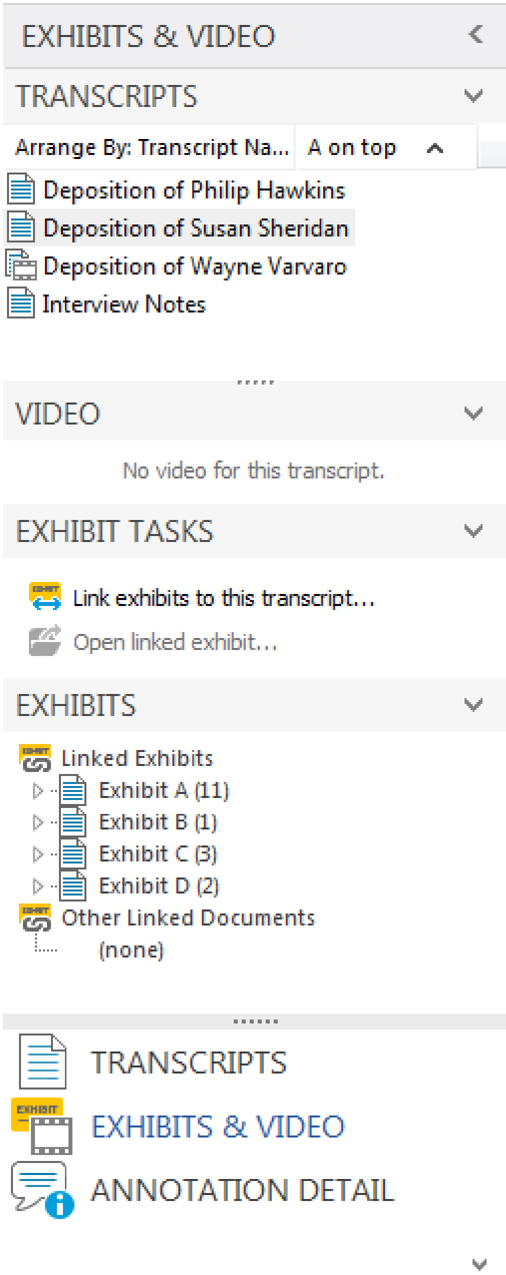
The Transcripts pane allows you to navigate between transcripts or transcript groups within a case. By default, transcripts are listed in alphabetical order by transcript name. Click the Arrange By button to choose whether transcripts are sorted by transcript name, transcript date, or import date. Click the Sort button to the right of the Arrange By button to toggle between sorting transcripts from ascending order or descending order.



Exhibits and Video pane

The Exhibits and Video pane has four task panes:

- **Transcripts pane** — Allows you to navigate between transcripts or transcript groups within a case.
- **Video pane** — Allows you to play the video depositions that are synchronized with the selected transcript.
- **Exhibit Tasks pane** — Allows you to link exhibits to the selected transcript and view exhibits and other documents linked to the selected transcript. Exhibits can be files on your computer, Web addresses, and custom links to other document management programs. The Open linked document feature is enabled when a linked exhibit or other linked document is selected in the Exhibits pane.
- **Exhibits pane** — Displays the exhibits and other documents linked to the selected transcript, includes links to where the exhibits and documents are linked within the transcript. Allows you to navigate to the exhibit and document links within the transcript by clicking the link in the Exhibits task pane.



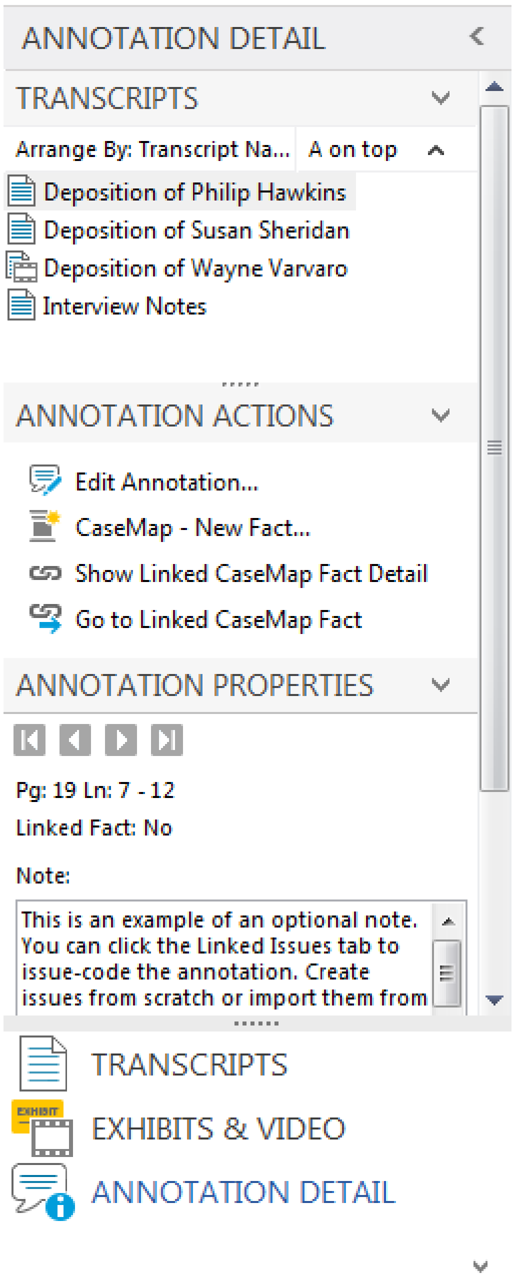
Annotation Detail pane

The Annotation Detail pane has three tasks panes and a toolbar:

- **Transcripts pane** — Allows you to navigate between transcripts or transcript groups within a case.
- **Annotation Actions pane** — Allows you to edit the selected annotation, send a new fact to CaseMap (the fact will be linked to the current annotation), view the linked CaseMap fact details, and view the fact record in CaseMap that corresponds to the selected

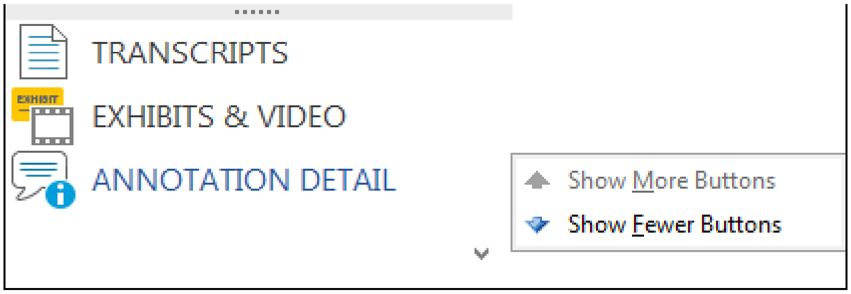
annotation.

- **Annotation Properties pane** — Displays the annotation properties for the annotation currently selected in the Transcript window. The annotation properties include the transcript page and line numbers for the annotation location in the transcript, whether the annotation is linked to a fact record in the corresponding CaseMap case, any annotation notes, and the name of linked case issues and the color associated with each linked case issue.
- **Annotation Detail toolbar** — Allows you to navigate between annotations in the selected transcript.



Arrow button

Below the Annotation Detail button is the Arrow button, which allows you to collapse or expand buttons to maximize the pane view.



Related Topics

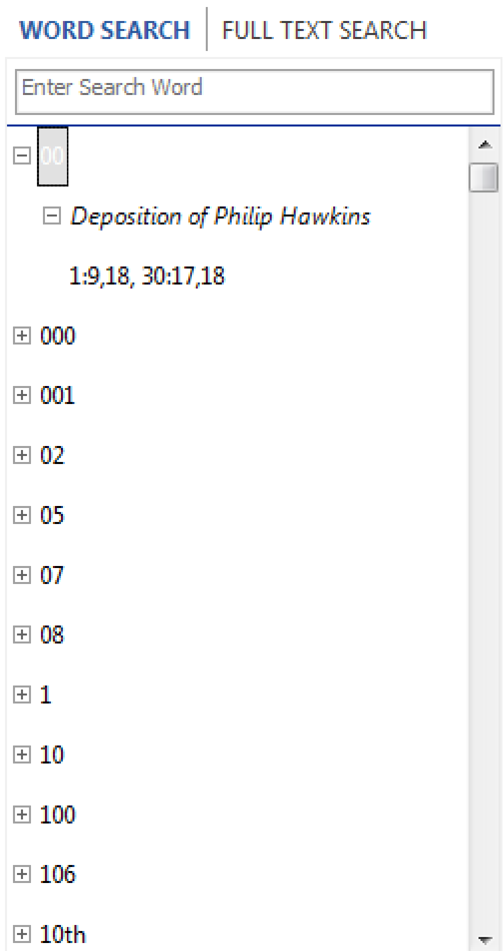
[Navigating TextMap]
[About the Search pane]
[Modifying Navigation pane display]

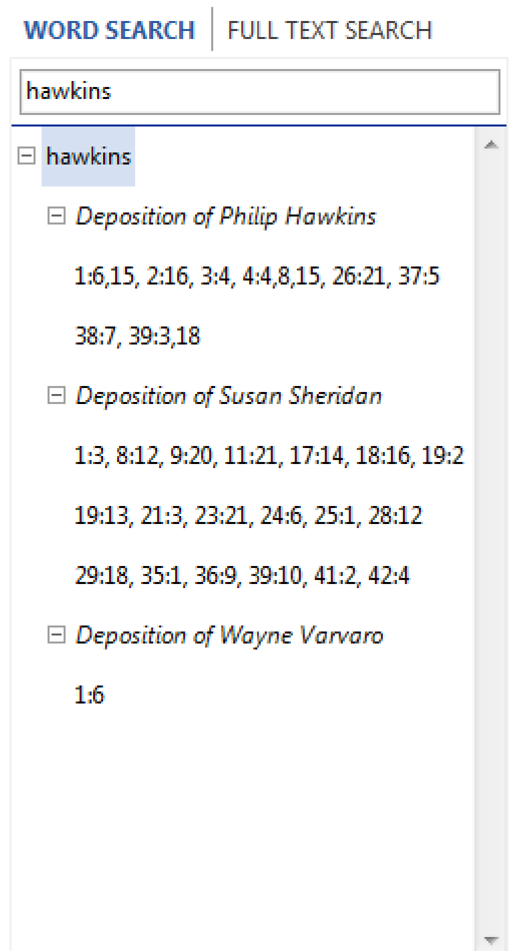
About the Search pane

The Search pane allows you to run basic word and full-text searches on transcripts in the case. The Search pane includes two tabs: Word Search and Full Text Search.

To view the Word Search tab

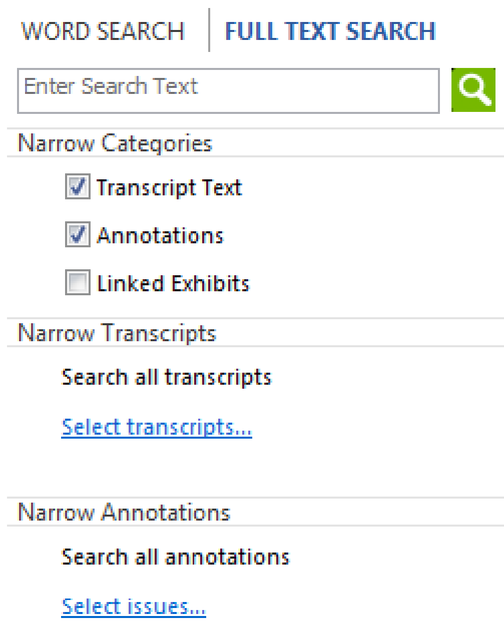
The Word Search tab allows you to run word searches on all transcripts in the case. Search results display within the Word Search tab. See About searching and Running basic word searches.

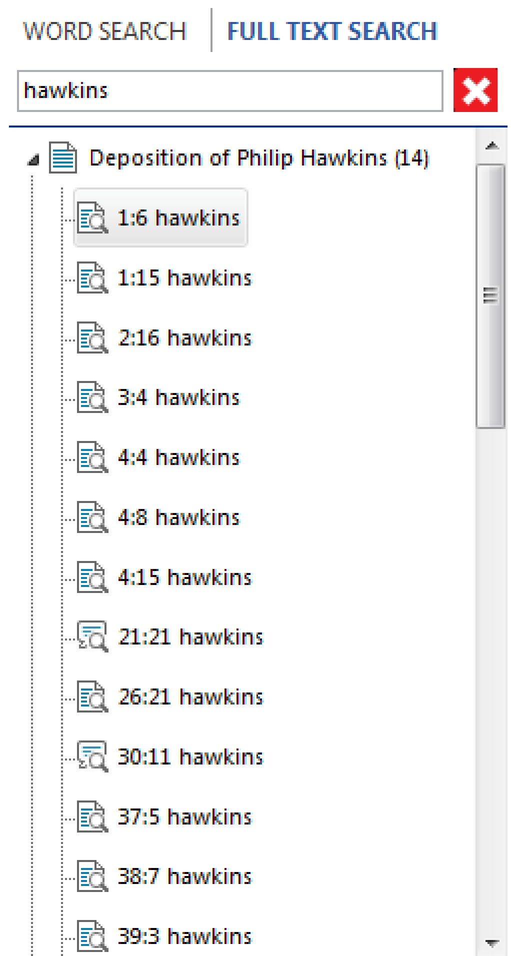




To view the Full Text Search tab

The Full Text Search tab allows you to run multiple word searches on transcripts in the case (or from the Full Text Search dialog box). Full-text searches can be run on all or selected transcripts or transcript groups. Full-text search results display within the Full Text Search tab. See About full-text searching and Running full-text searches.



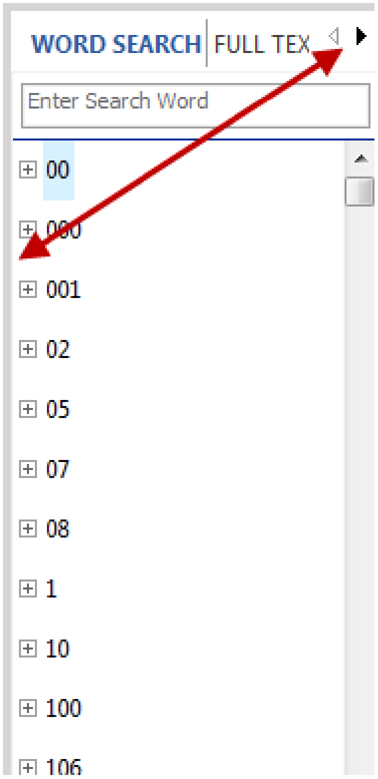


To resize the Search pane to maximize transcript view

The Search pane displays to the right of the Transcript window. To increase your viewing space, you can re-size the Search pane by dragging the split bar to the left or right.

You can change search tabs by clicking the Previous and Next buttons in the top right of the pane. The Previous and Next buttons display as the Search pane is re-sized closely to the right side of the TextMap window.

You can still run searches in either search tab as longs as the search box is visible; however you may not be able to view search results clearly or narrow full-text searches by category as easily.



Related Topics

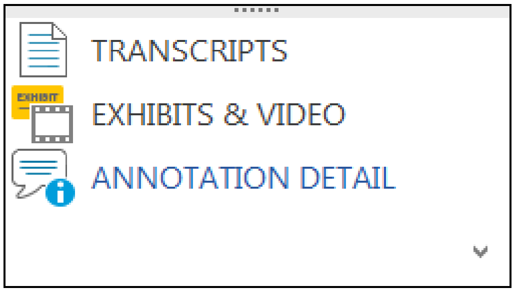
[Navigating TextMap](#)
[About the Navigation pane](#)
[About searching](#)
[Running basic keyword searches](#)
[About full-text searching](#)
[Running full-text searches](#)

Modifying Navigation pane display

You can modify the display of the Navigation pane to suit your viewing preferences: move the task pane buttons, resize the Navigation pane view, and hide the Navigation pane.

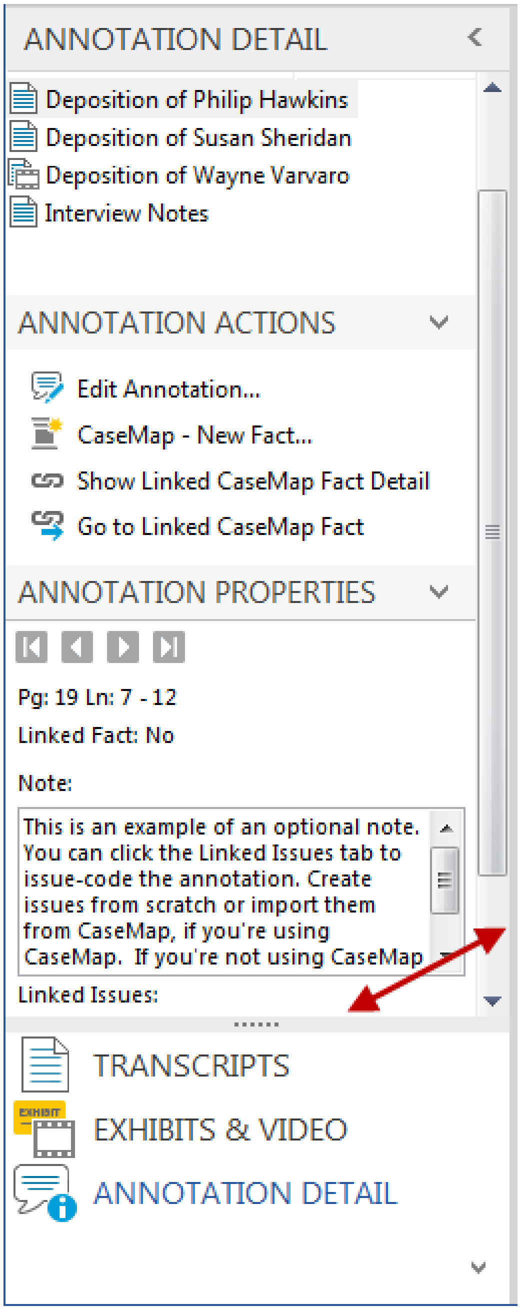
To change the Navigation pane display

To change the Navigation pane display, click on the respective pane's button. The active pane is highlighted accordingly.

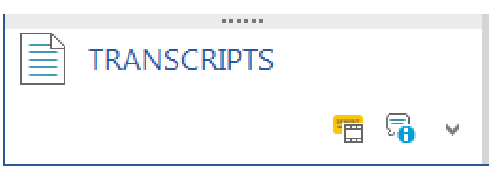


To maximize a pane for better viewing

To change the height or width of the Navigation pane, drag the split bars to the left or right, or up or down.

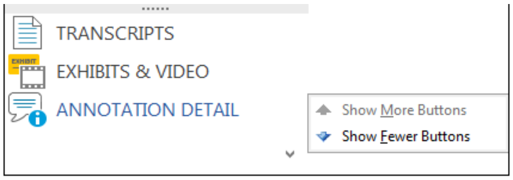


As you pull the bottom split bar down, the Navigation pane buttons change into icons on the lower button.



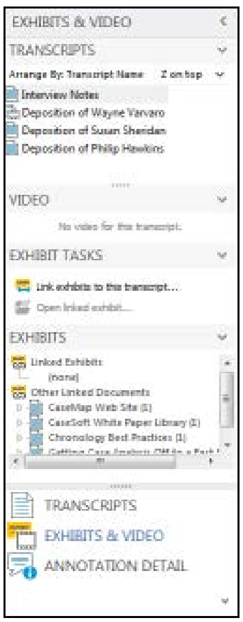
You can also, click the arrow on the lower button and select Show More Buttons or Show

Fewer Buttons to maximize the pane view.



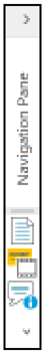
To hide task panes for better viewing

To show/hide task panes on the Navigation pane, click the Expand/Collapse buttons . For example, if you want to expand the display area of the Exhibits task pane in the Exhibits and Video pane, you can hide the Transcripts, Video, and Exhibits Tasks panes.



To hide the Navigation pane to maximize the spreadsheet view

To maximize a transcript's view on-screen, click on the Collapse button to pin the Navigation pane to the left side of TextMap. The Navigation pane can easily be expanded and locked on-screen when you need to use it more frequently.



Related Topics

[Navigating TextMap](#)
[About the Navigation pane](#)

About the title and status bars

TextMap has two title bars: one for the application and one for the transcript. The status bar is on the bottom of the TextMap window.

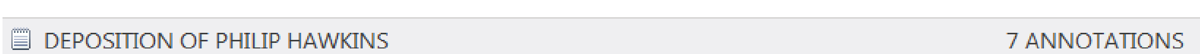
Application title bar:

TextMap's title bar displays the name of the case you are currently viewing.

Transcript title bar:

The Transcript title bar displays above the Annotations pane and Transcript window. The left side of the title bar displays the title of the current transcript. The right side of the title bar displays the number of annotations in the current transcript.

If a search is performed, a Search Results bar displays just below the title bar with the search criteria noted. Click the Cancel Search or Save buttons to remove the search or save it for later use.



Status bar:

The status bar at the bottom of the TextMap window displays the current transcript out of the total number of transcripts in the case, the current transcript page out of the total number of transcript pages, the current user name, and the indexing and OCR processing status.

Related Topics

[Navigating TextMap]

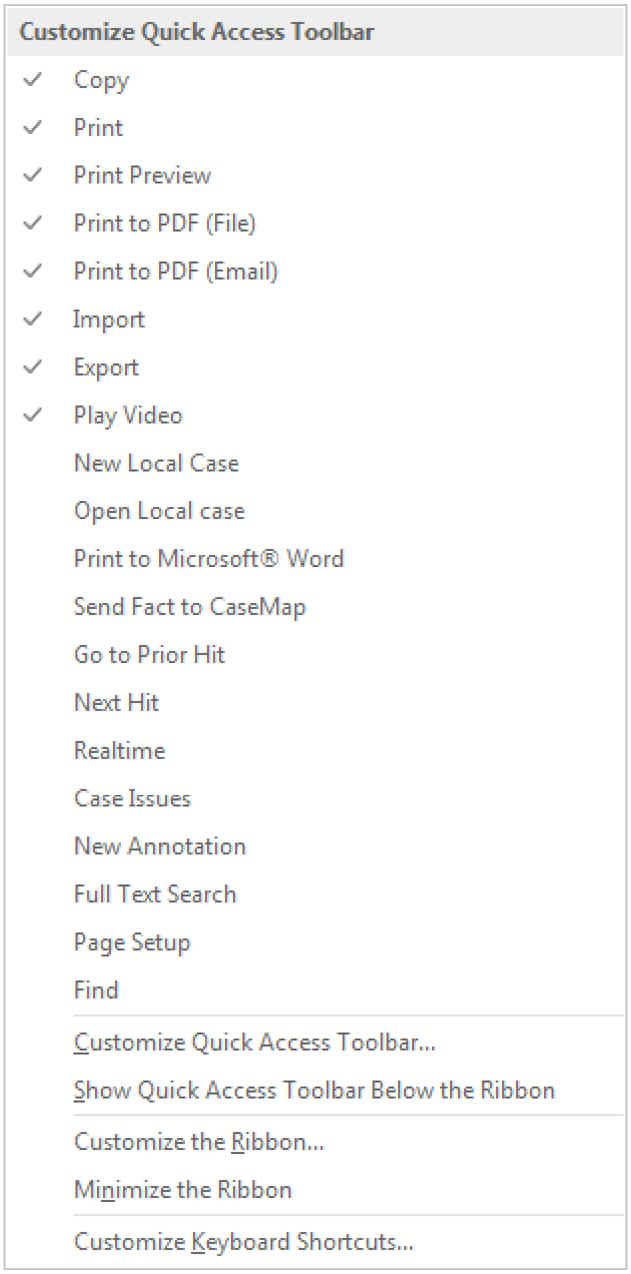
About TextMap toolbar buttons

TextMap has a Quick Access toolbar that you can customize to display which buttons you use most frequently. By default, the toolbar displays the most commonly used buttons. Place your mouse pointer over each button to view its name.

Click on the More Buttons icon at the far right of the toolbar to view a listing of all available buttons. Select a button in the button list to add or remove a button to or from the toolbar. All checked buttons in the list display on the toolbar.

The toolbar submenu allows you to determine which toolbar/ribbons are displayed in TextMap, and customize the Quick Access toolbar, to include customizing ribbons and keyboard shortcuts using the Customize dialog box.

To reset the toolbar to its original default view, click on the More Buttons icon to view the toolbar menu, and then select Reset at the bottom of the Ribbon Customization dialog box.



Quick Access toolbar buttons

Reference the following table for a listing of the Quick Access toolbar buttons and descriptions.

> Placing your pointer over an icon (i.e., Import Transcript) within the application provides a brief description/use of the selected icon.

Quick Access Toolbar Buttons		
Button	**Name**	**Use**
	Copy Selection	Use the Copy Selection button to copy text from a transcript to paste into a text file or another application.
	Copy with Page:Line	Use the Copy w/ Page:Line button to copy text or text from a transcript with page/line numbers included.
	Copy Annotatio ns	Use the Copy Annotations button to copy the contents of the selected annotation.
	Print	Use the Print button to print transcripts, annotations, notes, and the case index to the default printer.
	Print Preview	Use the Print Preview button to view the print preview of transcripts, annotations, notes, and the case index.
	Print to PDF (File)	Use the Print to PDF (File) button to print transcripts, annotations, and notes to an Adobe Acrobat PDF file. Opens the Save As PDF dialog box and allows you to save the PDF file to a local or network directory.
	Print to PDF (Email)	Use the Print to PDF (Email) button to compile a PDF and then opens the default email application so you can save the PDF file as an e-mail attachment.
	Import Transcript	Use the Import Transcript button to select one or more transcripts to be imported in to the case.
	Export Transcript	Use the Export Transcript button to select one or more transcripts, along with annotations and linked exhibits to be exported.
	Play Video	Use the Play Video button to play the video associated with the selected transcript. Clicking the Play Video button opens the Exhibits and Video pane in the Navigation pane, and the video is displayed in the Video pane. The Play Video button is only active when the selected transcript contains a video file.
	New Local Case	Use the New Case button to open the New Case Wizard for adding a new local TextMap case.
	Open Local Case	Use the Open Local Case button to open a dialog box for selecting and opening a local case in TextMap.
	Print to Microsoft Word	Use the Print to Microsoft Word button to print transcript annotations and notes to a Microsoft Word file.

Quick Access Toolbar Buttons		
Button	**Name**	**Use**
	Send Fact to CaseMap	Use the Send Fact to CaseMap button to send the selected text in a transcript to CaseMap. Before you can send a fact to CaseMap, the case must be opened in CaseMap.
and	Go to Prior Hit and Next Hit	Use the Go to Prior Hit and Next Hit buttons to navigate search hits in your transcript.
and	Go to First and Go to Last	Use the Go to First Hit and Go to Last Hit buttons to navigate search hits in your transcript.
Realtime...	Realtime	Use the Realtime button to open CaseViewNet. CaseViewNet is a free transcript viewer made by Stenograph, LLC.
	Case Issues	Use the Case Issues button to create, delete, and/or import issues associated with the case.
	New Annotation	Use the Export to iPad button to export case issues, transcripts, annotations, and linked exhibits to an Apple iPad.
	Edit Annotation	Use the Edit Annotation button to edit the selected annotation.
	Move Annotation	Use the Move Annotation button to move the selected annotation to a new location within the transcript.
	Delete Annotation	Use the Delete Annotation button to select an option to delete a single or all annotations from the transcript.
	New Fact	Use the New Fact button to create a new fact record in CaseMap.
	Full Text Search	Use the Send Fact to CaseMap button to send the selected text in a transcript to CaseMap. Before you can send a fact to CaseMap, the case must be opened in CaseMap
	Page Setup	Use the Page Setup button to adjust paper size, orientation, printer source, and report scaling options before printing reports and other materials.
	Find	Use the Find feature to search case content. You can also replace text if you need to change the spelling of a word in your case.

Quick Access Toolbar Buttons

Button	Name	Use
	Close	Use the Close button to close and exit the current transcript.

Related Topics

[Navigating TextMap](#)
[Changing toolbar buttons and settings](#)

Changing toolbar buttons and settings

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

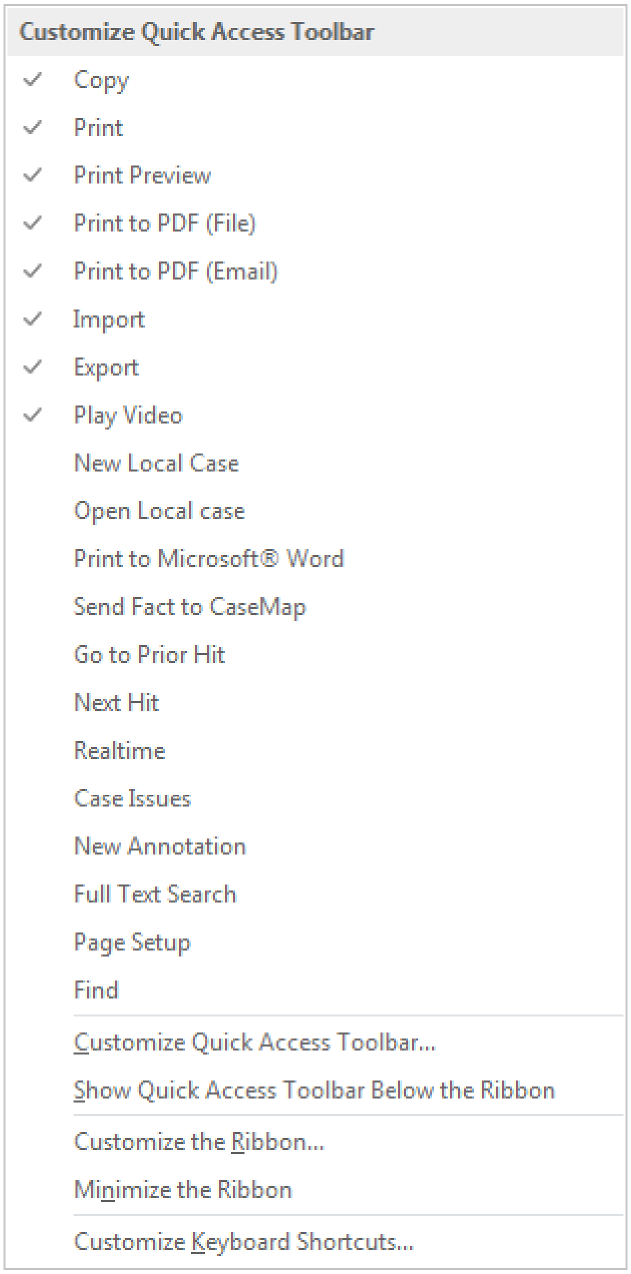
To add/remove toolbar buttons

1. On the **Quick Access** toolbar, click the **More Buttons** icon in the upper left corner.

   You can also right-click on the Quick Access toolbar.

2. From the **Quick Access Toolbar** list, select or deselect the buttons you want to display.

   Menu items with a check mark display on the toolbar. The toolbar display is updated.



To add menu commands to the toolbar

1. On the **Quick Access** toolbar, click the **More Buttons** icon in the upper left corner.

   You can also right-click on the Quick Access toolbar.

2. From the menu list, select one of the following:

   #### Customize the ribbon

   a. Click **Customize the Ribbon**.

b. In the **Choose commands from** area of the **Ribbon Customization** dialog box, select the desired command/tab.

   The Command display is updated based on the command type selected in the previous step.

c. Under the **Customize the Ribbon** heading, place a check mark next to the tab(s) to be displayed.

d. Use the applicable up or down arrow to place appropriately.

e. **Optional: To add a new tab**

   1. Under the **Customize the Ribbon** heading, select the tab/area where the new tab is to be added.
   2. Click the **Add** button, and then click **Add New Tab**.

      A new tab is added.

   3. Click the **Rename** button.
   4. In the **Display name** box, enter a new name for the tab.
   5. Click **OK**.

      The new name is displayed.

   6. Click **OK** to close the **Ribbon Customization** dialog box.

f. **Optional: To reset customized ribbon settings**

   1. Click the **Reset** button and select:

      Reset only selected tab to reset only settings for the selected tab.

      Reset all customizations to reset all customized settings back to the default system settings.

   2. Click **OK**.

To customize toolbar

1. Right-click on the **Quick Access** toolbar, and click **Customize Quick Access Toolbar**.
2. In the **Quick Access Toolbar Customization** dialog box, in the **Choose commands from** area, select a command in the list.
3. Select applicable tabs, submenus, etc. and click the right arrow .
4. In the Customize Quick Access Toolbar area, use the Up arrow to adjust the placement.

5. Repeat Steps 2 - Steps 4 as applicable.

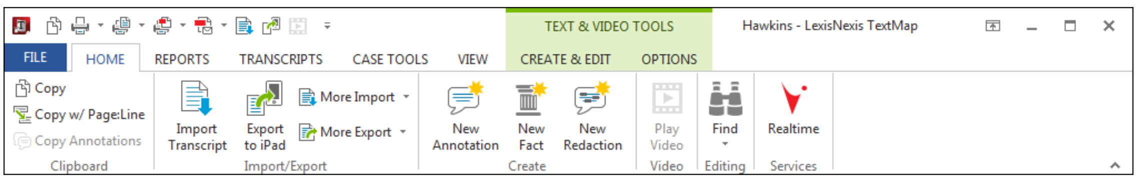
6. Click **OK** to save setting changes.

Related Topics

[Navigating TextMap](#)
[About TextMap toolbar buttons](#)

About TextMap menus

TextMap's Menu bar (now referred to as the Main Ribbon) is located at the top left of the TextMap screen. Click on each ribbon (e.g., Home) to access the menus/commands, each providing additional functionality in TextMap.

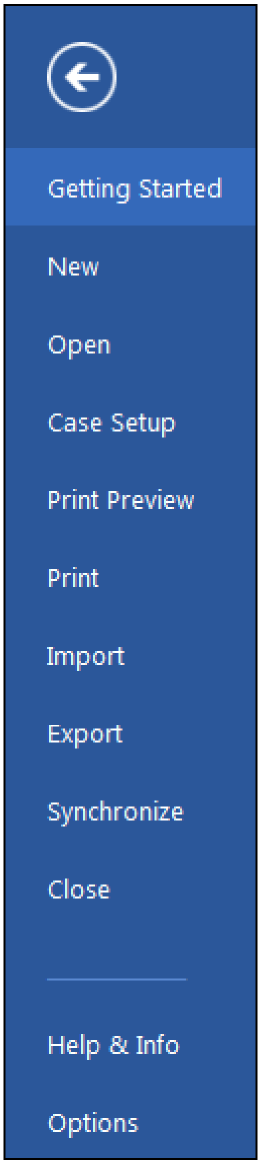


The commands on each menu affect the transcript currently in view. Some options will give you an arrow that opens a submenu of additional tools. Most of the commands also have corresponding keyboard shortcuts. See [Using keyboard shortcuts](#).

File menu

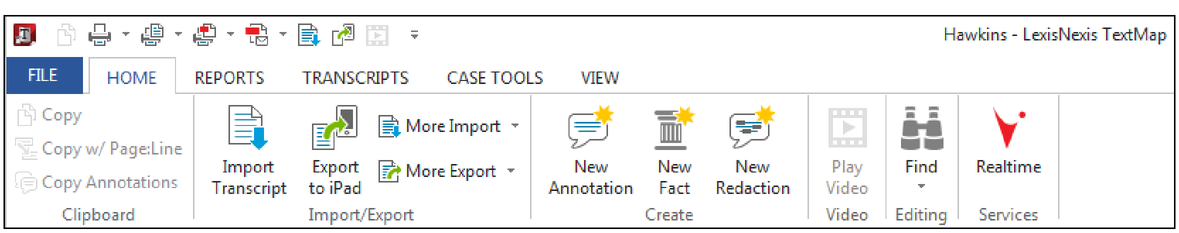
The File menu contains menu items useful in getting started and accessing your case, such as New Case, Open Case, Open SQL Case, Close Case, and Exit. The File menu also has options for importing data from other applications, exporting case issues, transcripts, annotations, and linked exhibits, changing report options in the Page Setup dialog box, creating a replica and synchronizing data from a replica case with the master file. Print and Print Preview options are also listed on this menu. And you can view case properties too.

> If you are using CaseMap Server, the File menu has two options for opening a case: Open Local Case and Open SQL Case. The menu also has an option: New Local Case.



Home ribbon

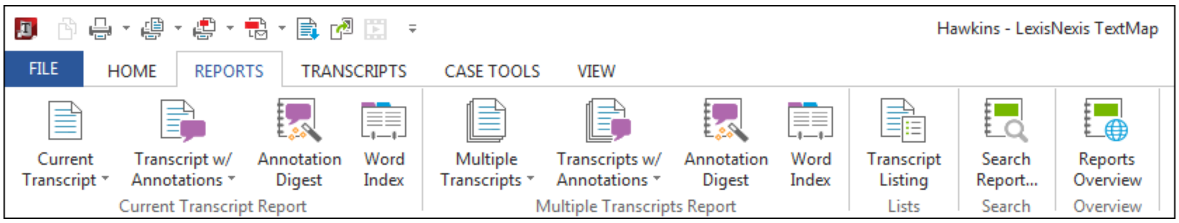
The Home ribbon contains menu items for copying transcript text in the Transcript window, finding text in the current transcript using the Find dialog box, and navigating directly to a page and/or line within the selected transcript using the Go To dialog box. The Home ribbon provides you with import and export capabilities, to include the ability to add new annotations, facts and redactions with access to CaseViewNet®.



Reports ribbon

The Reports ribbon contains menu items for printing transcripts using the Transcript Listing tab. There is also a command for printing the TextMap Transcript Listing report, which displays the list of transcripts in each case.

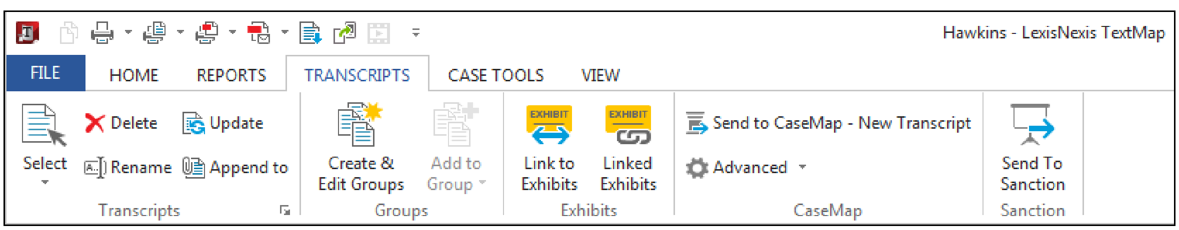
The Search Reports submenu contains menu items for generating and printing a Search Report for the current search results or creating a new search and printing the search results for the new search.



Transcripts ribbon

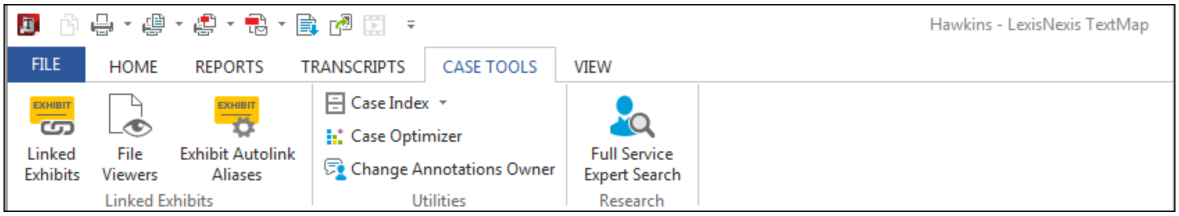
The Transcripts ribbon contains menu items for selecting the transcript to display, creating and maintaining transcript groups, linking exhibits to transcripts, renaming, deleting, updating, and appending transcripts, adding transcripts to a transcript group, as well as sending transcripts to CaseMap and/or Sanction.

The Send To CaseMap option allows you to send transcripts to CaseMap, whereas the Advanced CaseMap submenu allows you to update the transcript in CaseMap, show the linked CaseMap record detail, navigate to the linked CaseMap record in CaseMap. The Transcripts ribbon also provides you with the ability to send transcripts to include Media clips directly to Sanction.



Case Tools ribbon

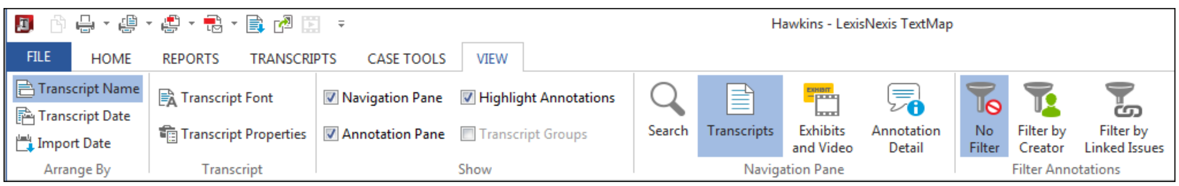
The Case Tools ribbon contains menu items for managing linked exhibits, exhibit autolink aliases, and TextMap utilities. Per one of the utilities, the Case Index submenu, you are allowed to rebuild the case index, view linked exhibit index and OCR status, disable/enable OCR processing, and manage the Case Ignore Words list. Other utilities allow you to optimize the case, change annotation owners, and also provides access the LexisNexis Expert Research On-Demand web site.



View ribbon

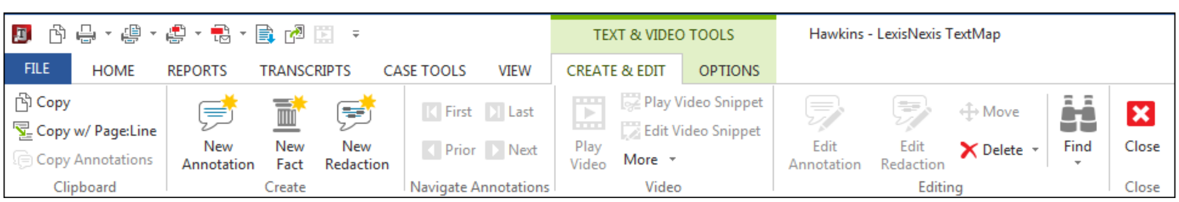
The View ribbon contains menu items for modifying the TextMap user interface based on your viewing preference. From the View ribbon, you can change the arrangement/sort order of transcripts, choose whether to display all transcripts (i,.e., groups), manage transcript font size and transcript properties, show/hide the Navigation, Annotation, and annotation highlights in the Transcript window, and determine which pane (e.g., Transcripts) is currently displayed in the Navigation pane.

With the Filter Annotations tab, you can filter annotations by creator or linked issues.



Text & Video Tools Create & Edit ribbon

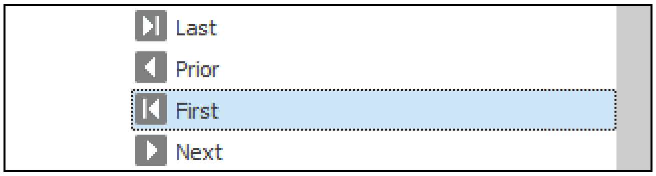
The Create & Edit ribbon appears when there is transcript text focus, or when an annotation or transcript text has been selected. It is accessed from the Text & Video Tools ribbon and contains menu items for copying transcript text in the Transcript window, finding text in the current transcript using the Find dialog box, and navigating directly to a page and/or line within the selected transcript using the Go To dialog box. From the Create & Edit tab, you can also manage videos, navigate, create and edit annotations.



Adjust navigate annotation ribbon button layout

1. Open a case in TextMap.
2. Click on any transcript text to display the Create & Edit ribbon.
3. Right-click on the **Text & Video Tool** Create & Edit ribbon, and on the sub-menu, click **Customize the Ribbon**.
4. In the **Ribbon Customization** dialog box, select the **Navigate Annotations** option to be

moved, and then using the **Up**  or Down  arrow, change the order to any order necessary to meet your needs.



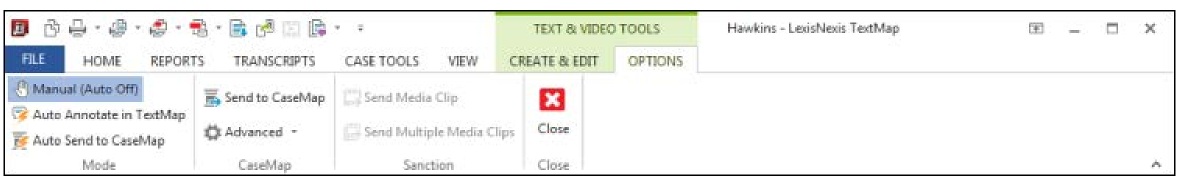
5. Click **OK** to implement the change.

   The changed order is displayed on the refreshed Text & Video Tools Create & Edit ribbon.

Text & Video Tools Options ribbon

The Options ribbon appears when there is transcript text focus, or when an annotation or transcript text has been selected. It is accessed from the Text & Video Tools ribbon and contains menu items for:

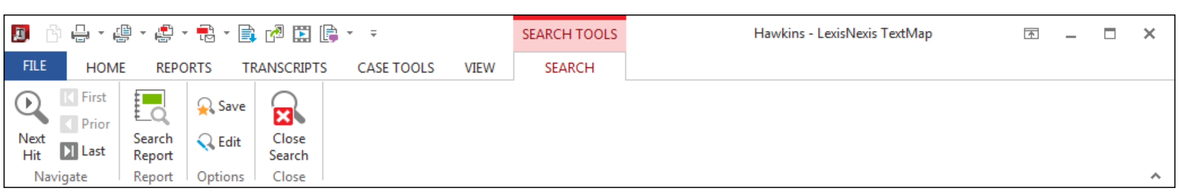
- selecting the annotation mode
- sending annotations to CaseMap
- sending annotations to Sanction as media clips when the transcript has synchronized video
- updating facts associated with an annotation in CaseMap
- showing the linked CaseMap fact detail
- navigating to the linked CaseMap fact in CaseMap.



Search Tools Search ribbon

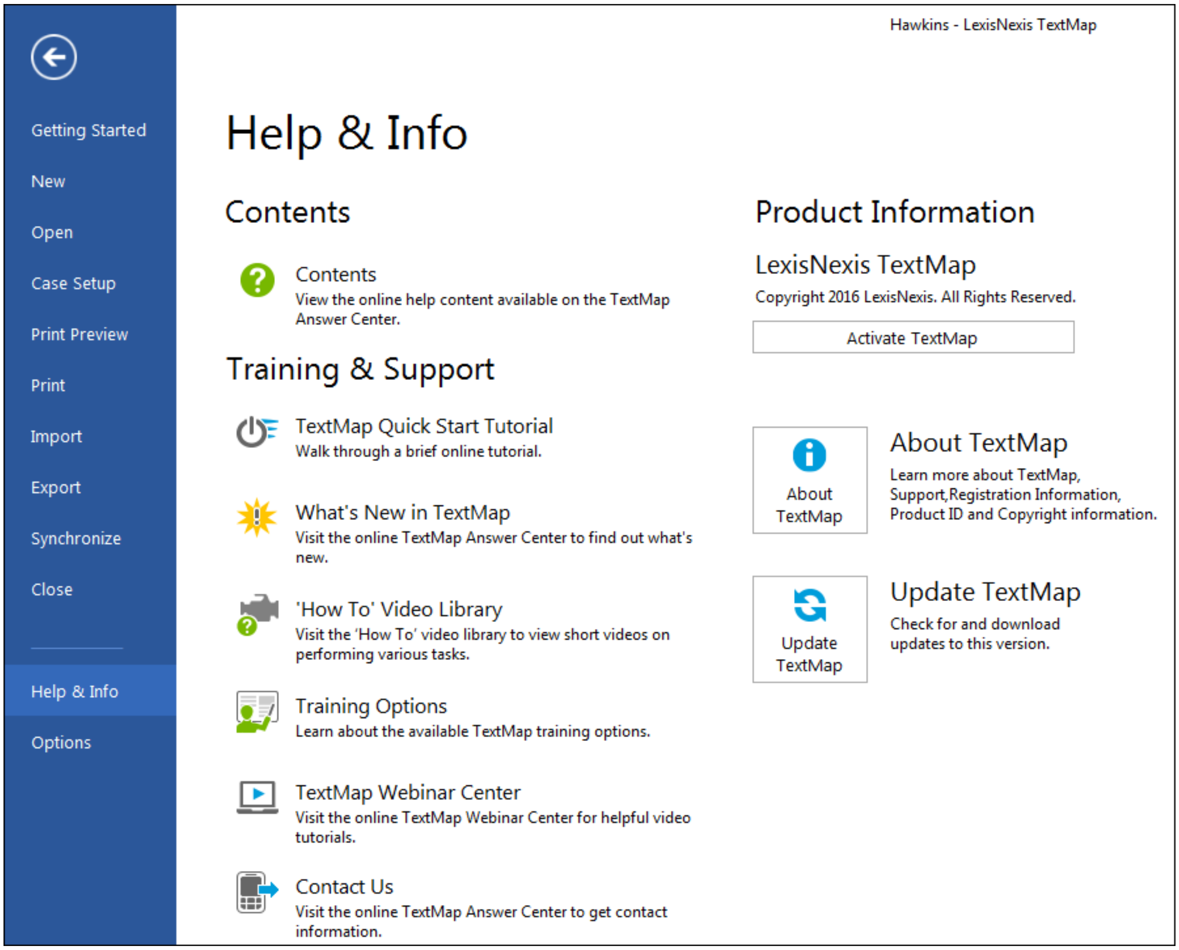
The Search ribbon appears when there is an active search and contains menu items for navigating between search hits in the selected transcript, creating reports, saving, editing, and canceling the current search.

The Search Reports ribbon's Search Report menu item launches the Search Report Wizard to generate and print a Search Report.



Help & Info menu

The Help menu which is accessed from the File menu provides access to the TextMap Answer Center as well as a variety of other reference materials. From this menu, you can also reference your TextMap license and registration information, activate the software, and check for Web updates of the software, to include access to TextMap Training and Support information.



If you are using CaseMap Server and have a SQL case open, click About LexisNexis TextMap and then click the Disabled Features button to verify if any permissions are disabled for your user account. If no permissions are disabled, a message displays to indicate that.

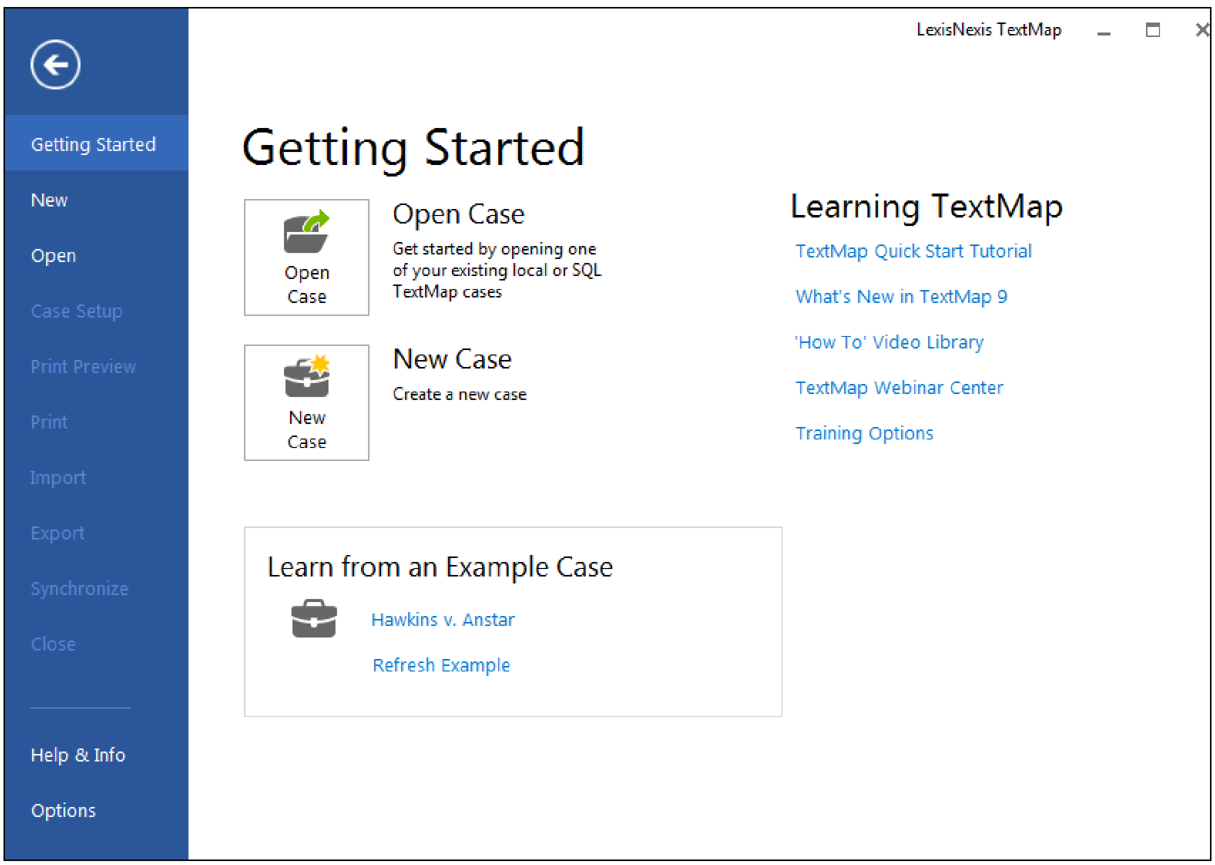
Related Topics

[Navigating TextMap]
[Changing toolbar settings and buttons]

Getting Started

About the Getting Started pane

The Getting Started pane displays when you open TextMap or close a case. From this pane you can access recently-opened cases, older cases, create a new case, or refresh and open the Hawkins example case. You can access a variety of learning resources from here too. If you already have a case open and want to open the Getting Started pane, you can still access this pane from the File menu.



You can clear the recent case list from the Help menu, by clicking on Options and then clicking General. On the General tab, click the Clear Recent File List button. Click OK when you are finished.

To open/close the Getting Started pane when a case is open

1. Click the **File** menu.

The Getting Started page displays.

You can also click the Getting Started tab from another tab (e.g., Case Setup) to open it.

2. On the **Getting Started** pane, click the **X** in the upper right corner t close it.

   You can also click on another tab (e.g., Case Setup) to close the Getting Started page.

Related Topics

[Practicing with sample data]
[Quick Start Tutorial]
[Opening cases]

Practicing with sample data

TextMap provides you with a sample case, Hawkins v. Anstar, so you can practice using the application without using your own data. Hawkins v. Anstar is a fictitious case. When experimenting with the case, you can feel confident about clicking, adding, updating, and deleting data without ruining it. Any changes you make to the example case are automatically saved so you can see how the software displays and updates data.

You can always practice a feature more than once by refreshing the sample data to its original state and starting again.

To open the example case

On the **Getting Started** pane, under **Learn from an Example Case**, click **Hawkins v. Anstar**.

If you cannot find the Getting Started pane, click the File menu and then click Getting Started.

To refresh the example case

1. On the **File** menu, click **Getting Started**.
2. On the **Getting Started** page, under **Learn from an Example Case**, click **Refresh Example**.
3. Click on **Hawkins v. Anstar** to re-open the refreshed case.

Related Topics

[About the Getting Started pane]

[Quick Start Tutorial](#)
[Opening cases](#)

Using the Quick Start Tutorial

If you have not yet signed up for TextMap training, the TextMap Quick Start tutorial will help get you grounded in using the software and working in a case.

The TextMap Quick Start tutorial is designed to help you:

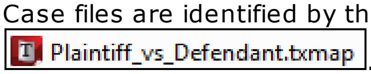
- Learn about TextMap's primary features.
- Gain an introduction to the tools and features you need to use to create a case and start working in it.
- Practice using some of the features using the Hawkins v. Anstar example case provided in TextMap.
- Direct you to the help topics and procedures you need to accomplish initial tasks and learn more about TextMap.

Creating new cases

TextMap cases are created using the New Case Wizard, which guides you through answering all the questions needed to create the file. The New Case Wizard provides you with a default new case template that accommodates most of your data entry needs. The example case, Hawkins v. Anstar, uses a new case template. See Practicing with sample data.

TextMap cases are used by multiple staff. Store the case in a shared location on a network drive so more than one staff member can work on annotating and summarizing depositions and transcripts in the case file at the same time. You can add case staff as users in the New Case Wizard or add them later in the Case Staff dialog box by clicking File > Case Setup > Edit Staff.

Case files are identified by the column icon and have a file extension of .txmap



.

See About cases, Creating cases, and Adding users to cases.

Importing transcripts

You must import transcripts into your new case before you can search and annotate them or cull out facts to send to CaseMap. Import transcript files into TextMap by clicking the Import File(s) option on the File or Transcript menus. Transcripts display in the main Transcript window with page and line numbers displaying in the left margin.

The most common way to import information into TextMap is by importing a file in an ASCII text file. This allows the line numbering and page numbering of the original transcript to be the same as the transcript inside TextMap. See About importing data for a complete listing of files types you can import. See Importing transcripts for more information about the import process.

TextMap Exhibit Packages (created by TextMap® Exhibit Linker) include a transcript, hyperlinks to exhibits mentioned throughout the text, and the linked exhibit documents. You import an Exhibit Package file (*.xmef) just like any other transcript. All the exhibits and exhibit hyperlinks in the transcript are available instantly. See Importing exhibit packages.

You can also import video files like any other transcript in TextMap. When the import is complete the transcript displays in the Transcript List with a video icon that is different than the icon for text-only transcripts. You can search and annotate video transcripts just as you would with other transcripts in the case. See About videos and Importing video files.

Creating case issues

If you are using TextMap and CaseMap together you can import your issue outline from a corresponding CaseMap case and then create categorizing issues, like Background, that are only used in the corresponding TextMap case. If you are using TextMap as a stand-alone transcript summary tool, you can quickly create an issue outline from scratch. See About case issues and Importing case issues.

In TextMap, all issues are initially set to the default color yellow. You can assign each issue a color so that it can be easily identified when scrolling through the transcript. For instance, you could color code all research items red to be easily recognizable. You can also move topics around in an issues list, arranging issues in a different order. And you can create sub-issues or child issues of the parent issue. See Creating case issues.

Once issues are created and coded by color, you can issue-code annotations. Annotations can be linked to one or more case issues. See About annotations and Creating annotations.

Searching transcripts, annotations, and linked exhibits

TextMap allows you to quickly search all transcripts, exhibits, documents, annotations, and notes in your case because it automatically creates a case index during the import process.

Searching is performed in the Search pane that displays at the bottom right of TextMap. The Search pane contains two tabs: Word Search and Full Text Search. Search results display within their respective tabs. See About the Search pane.

There are two methods of searching in TextMap:

- **Basic Word Searches** — performing single word searches to locate all instances of the word in transcript text. See Running basic word searches.
- **Full-Text Searching** — performing full-text searches against transcript text, annotations, and exhibits. See About full-text searching and Running full-text searches.

To learn more about searching, see also About searching and Viewing/navigating search results.

Choosing an annotation mode

TextMap offers three annotation modes to help you simplify the annotation process, depending on how you want to work. Each time you open a case in TextMap, the TextMap Default Annotation Mode dialog box displays, unless you select the Don't show again check box. You can change annotation modes at any time by clicking the Annotation menu and then clicking the desired mode. You can also click on the Annotations button on the toolbar or use the right-click menu. Manual Mode is the default annotation mode.

- If you choose **Manual Mode** (default), each time you annotate text you will have the option to choose which mode you want to use: Annotate in TextMap or Send to CaseMap.
- If you choose **Auto Annotate in TextMap**, the New Annotation dialog box automatically displays each time you highlight transcript text. You can quickly type in notes or link issues and exhibits before you send the passage to CaseMap. See Creating annotations.
- If you choose **Auto Send to CaseMap** mode, the annotated passage will be sent as a new fact to CaseMap and the Send to CaseMap dialog box displays. See Sending facts to CaseMap.

To learn more about switching annotation modes, see About annotations.

Annotating transcripts

After transcripts have been imported into TextMap, they are ready to be analyzed and annotated. During this process, you will select phrases, sentences and paragraphs, and comment on them. Annotations can be part of a deposition summary report, or passage you want to use as the basis for a fact in CaseMap. You can categorize annotations by case issue and link exhibits to the annotated text. Annotations display in the transcript as yellow (by default). Annotations linked to issues display the color of that issue code. Annotations can be linked to one or more issues. See About annotations and About case issues.

To annotate a transcript, use your mouse to highlight a passage of transcript text, then right-click to select the annotation mode you want to use: Annotate in TextMap or Send Fact to CaseMap. See Creating annotations.

Annotated text displays highlighted in the Transcripts window (center pane) with a sticky note icon in the left margin. The annotation displays as yellow by default or in the color of the linked issue.

Annotations also display in the Annotations pane where they can be sorted and filtered. You can also view annotations in the Annotation Detail pane. See Viewing annotations, Sorting annotations, and Filtering annotations.

Color-coded annotations display in reports in color. Reports can be filtered so only annotations associated with specific issues are included. See Printing annotation reports.

Reviewing and annotating using the TextMap App for iPad

With TextMap, you can easily review and annotate transcripts on your Apple® iPad®. Download the free TextMap app for iPad from the Apple Store and then email the transcripts you want to review. Simply open the email attachment on your iPad to import the case.

When you are ready to update the master case with your new or edited annotations, simply email them from the iPad. Opening the email attachment will start the import process and prompt you to apply your updates to the master case. TextMap has no limit to the number of case users that can send annotations from their iPads.

Anytime you need the most recent changes to the master case, export the changes and merge them with the changes already on the iPad.

For more information, see About the TextMap app for iPad, Exporting data to an iPad, and Importing data from an iPad.

Sending facts to CaseMap

We encourage you to use CaseMap from the first day you begin working on a new matter.

When you use CaseMap in conjunction with TextMap, you can enter new facts well in advance of having court-appropriate sources for these fact records. And you can always update the existing fact records while working in TextMap. Later, when you find a source for a given fact as you review a transcript, you can update the pre-existing fact.

TextMap is designed so you can optionally perform all basic data entry about a fact in the midst of sending a transcript passage to CaseMap. These options are available in the dialog boxes that display when you send a new fact to CaseMap or update an existing one. For each transcript passage sent to CaseMap, TextMap automatically creates a source that references the transcript and the page and line numbers of the selection. You must have the related CaseMap case already open in order to send transcript annotations from TextMap to CaseMap.

You can tell which annotations have already been sent to CaseMap by checking the Annotations pane at the top of the page. The Linked Fact column has a Yes/No status indicator for each annotation. Annotations with a Yes have been sent to CaseMap. The CaseMap fact automatically links back to the selected passage in the transcript. If the fact has already been sent, a message displays asking if you want to re-send the annotation (it replaces the link to the existing fact).

If you intend to send multiple annotations to CaseMap, consider switching to the Auto Send to CaseMap annotation mode. Click the arrow next to the Annotate in TextMap button or click the Annotations menu, and then click Auto Send to CaseMap. Each time you annotate transcript text the Send to CaseMap dialog box automatically launches, skipping the New Annotation dialog box

See Sending facts to CaseMap and Updating existing facts in CaseMap.

Linking exhibits to transcripts

Exhibits can be files on your computer, web addresses, and custom links to other document management programs. When you have a file that has been referred to as an exhibit during a transcript, you want that file to be linked wherever that exhibit is referred to in the transcript. You can link to exhibits using either the TextMap Exhibit Linker or the Auto Link Exhibit Wizard. See About exhibits.

Link Exhibit Wizards include:

- **TextMap Exhibit Linker** is used before you import transcripts into a TextMap case. This software is provided to court reporters, vendors, and law firm staff so that they can create TextMap Exhibit Packages (.xmef) which can then be imported into TextMap. These files already have the exhibit links embedded in the transcripts. TextMap also imports the linked exhibit PDFs during the import process. See Using TextMap Exhibit Linker.
- The **Auto Link Exhibit Wizard** is used once you have already imported a transcript into TextMap. With this wizard, you can create a hyperlink to a file on your computer, a web address, or a link to another document management system in all places in the transcript where the exhibit is mentioned. See Linking exhibits to transcripts.

Hyperlinks for exhibit files display in the Exhibits and Video pane in the Exhibits pane for the selected transcript. When you click a page and line reference, TextMap displays that point in the transcript. You can view the exhibit by clicking the hyperlink in the transcript or by right-clicking on the exhibit link in the Exhibits pane and clicking Open. You must have the native application installed on your computer in order to view the file. See Viewing exhibits.

To link exhibits or any other files to a single passage in the transcript, use the New Hyperlink Wizard. See Creating single hyperlinks in transcripts.

Working with video

You can import video files like any other transcript in TextMap. When the import is complete the transcript displays in the Transcript List with a video icon that is different than the icon for text-only transcripts. For a list of video files you can import, see About videos and Importing video files.

Videos play in TextMap with a cursor scrolling through the text in synch with the video because there are three components working at the same time: a video file (an .mpeg or .wmv), a text file, and a file with synchronization information.

You can search and annotate video transcripts just as you have done with other transcripts in the case. See Annotating videos. In addition, you can use the Edit Video dialog box to make a snippet associated with an annotation a little shorter or longer. See Editing videos.

Before you can play back transcript video in TextMap, you must first have the transcript synchronized with the video. TextMap does not synchronize the video and the transcript for you. Usually your court reporter or videographer can perform the video synchronization service for you. When you schedule a video deposition with court reporters, make sure to ask if they can perform the video synchronization service and provide the synchronized transcript in a format that TextMap can import.

Creating and printing reports

A report is a way to retrieve information that you imported or entered in your case. TextMap offers many useful reporting options, accessible on the Reports ribbon with single and multiple transcript sub-menus. Many of the reports have wizards to make creating useful work product quick and easy. Transcripts with annotations and linked issues have options for including the selected passages and filtering highlighted passages for desired issues. TextMap automatically creates a word index for all transcripts; you can include it with transcript reports or not.

You can print reports to PDF file or print directly onto paper. You can run reports of only the transcripts, just the annotations, or of both the transcripts and the annotations.

The date and time appears in brackets [ ] in front of the transcript name, and is included in all transcript reports (i.e., Multiple Transcript Report, Annotations Digest Report, etc.).

TextMap includes the following reports:

- **Single Transcript Report** — A simple report made from just one transcript. These reports provide you with the contents of the transcript arranged the way you specify, with the opportunity to select all annotations or annotations related to a specific issue. You can print the contents with or without annotations. You also have the option of printing the word index for that transcript as part of your report. See Printing single transcripts.
- **Multiple Transcript Report (a.k.a ReportBooks)** — A report containing information from more than one transcript is also called a ReportBook. You have the opportunity to choose what transcripts to include in the ReportBook, as well as the option of including a Title Page, Table of Contents, and Introduction. You will have the option to organize transcripts in the order you want them. You also have the same options that you do with a single transcript report. See Printing multiple transcripts.

  Annotation Digests are also ReportBooks that can be printed to Microsoft Word. Annotation Digests include the annotations and notes from a set of ReportBooks and can be filtered by issue. See Printing Annotation Digests.
- **Search Report** — The Search Reports is based upon terms you type into the Full Text Search box. The report shows by transcript all locations that contain the search criteria. See Printing a Search report.
- **Transcripts Listing** — A Transcripts Listing provides a list of the transcripts in the case. See Printing the Transcript Listing.

Single and multiple transcript reports can be printed as full-sized, condensed or note-taking versions. Transcripts with Annotations reports allow you to print with Footnotes or Endnotes (full-size or condensed). See Understanding layout options.

The Transcripts with Annotations report, Transcripts with Linked Exhibits report (and no annotations), and Annotation Digest reports allow you to print to a PDF format that includes linked exhibits embedded in the transcript. See Selecting print output options.

For more information, see About reports.

Taking TextMap on the road

Create replica cases for staff who need to work from home or access a case during court or offsite depositions. Replica cases include access to linked files and exhibits, with the exception of Web sites and links to files in a document management systems.

When case users go on the road, they can take a replica along and make additions and updates to case records. While these individuals work in replicas, case staff back in the office can still make changes to the master case. When the replica is returned or emailed to the office, the latest content can be synchronized into the master case.

With TextMap, a replica can be synchronized repeatedly with the master case — without creating duplicate transcripts and annotations. This allows users on the road to email replicas back to the main office for synchronization each time significant updates are made, while continuing to work in the replica.

All replica names (local and SQL versions) must be unique. Creating a replica of a TextMap case is an exclusive process. Case staff cannot access the master case during this process.

For more information, see About replicating/synchronizing cases and Creating replica cases.

Related Topics

Practicing with sample data
Opening cases

Opening cases

Case files are databases created to store all the data related the case. Some case files are created and saved locally on your organization's network. Other case files are created and stored for remote user access across your organization's Wide Area Network (WAN). For example, case files stored on a WAN can be accessed by TextMap users across the nation or even in another country. Depending on how the case file is created and where it is saved determines how you will open the case in TextMap. Case files that are located on the WAN may take longer to open than those saved locally.

Three methods of opening a case:

- File > Open > Recent Cases — Launches a list of cases you frequently use.

- File > Open > Computer — Launches cases saved locally on the network and written to a Microsoft® Access database. These case files are saved in network folders where other case file data is stored and organized.
- File > Open > SQL Case — Launches SQL cases stored on the Wide Area Network (WAN) and written to a SQL database. These cases are saved in CaseMap Server, which is a dedicated database server designed to store TextMap cases.

  If you do not have CaseMap Server, you will not see this option on the File menu.

If you are working in multiple cases, you need will need to know which option to use for each case file you want to open. If you are opening SQL cases, your system or database administrator will need to provide you with the network server name and which authentication option to use when opening the case.

TextMap allows you to open one case at a time within an active application window. If you want to work in other cases simultaneously, you'll need to launch additional TextMap windows to access them. Case names display in your Windows title and status bars so you can differentiate them while working.

> If you cannot open a case, contact your system administrator and tell them the case name you need to open. They can ensure that you have proper access to to the network location where the case file is stored.

> If you are working in a SQL case and a menu item is grayed out, you may not have permission to use that TextMap feature. Contact your system administrator for more information.

To open a local case

1. On the **File** menu, click **Open**, and then select **Computer**.

   If you do not have CaseMap Server, click File, and then click Open.

2. In the **Select Local Case to Open** dialog box, browse to the network directory folder to locate the case you want to open and click on it.

3. In the **TextMap Default Annotation Mode** dialog box, click **Close**.

   We recommend you leave the default setting of Manual Mode until you understand and learn how to use Annotation modes. See About annotations.

To open a SQL case

1. On the **File** menu, click **Open**, and then click **SQL Case**.

   You can also press CTRL + O to open a SQL case.

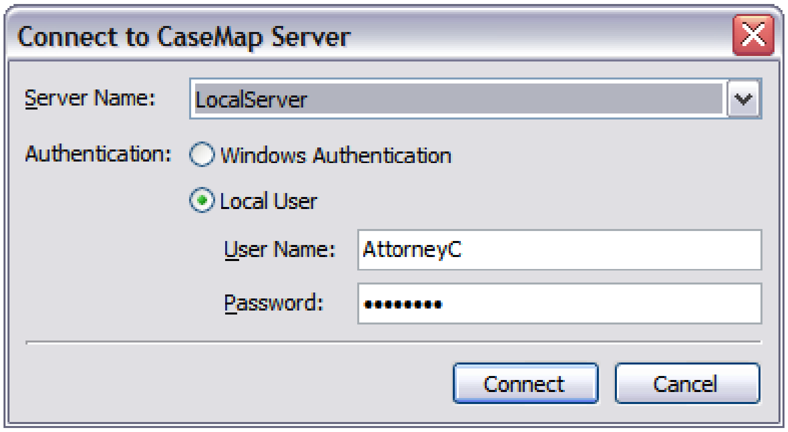
2. In the **Connect to CaseMap Server** dialog box, select the server you want to use in the **Server Name** list.

3. In the **Authentication** area, select the type of authentication being used to access the SQL case: **Windows Authentication** or **Local User**.

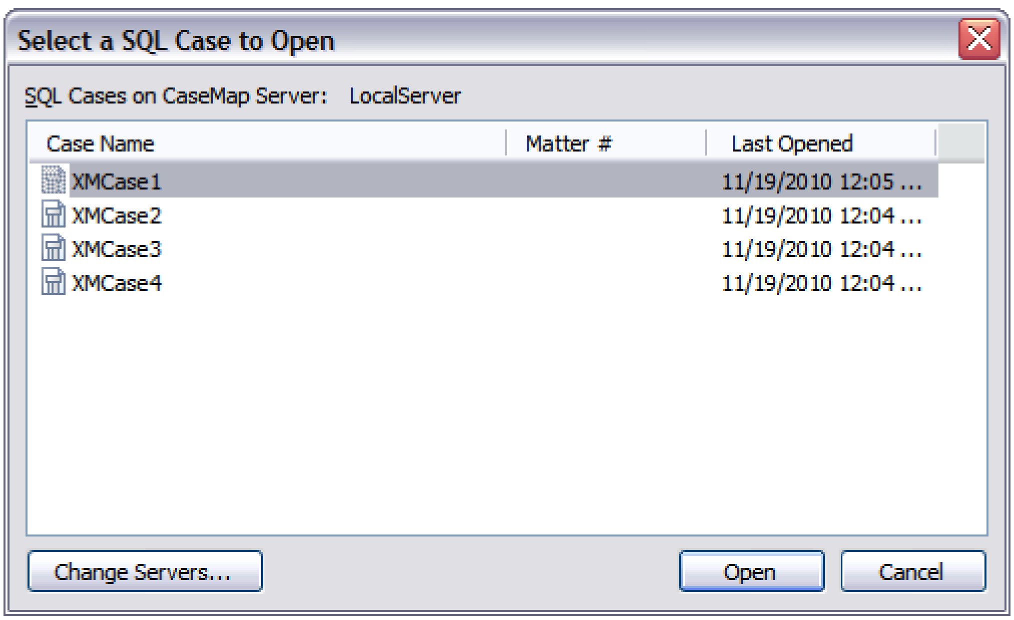
   If you select Local User, then type in your user name and password.

If you do not know which authentication method to use, contact your system administrator.

4. Click **Connect** to continue.



5. In the **Select a SQL Case to Open** dialog box, click on the case you want, then click **Open**.



The selected SQL case now opens in TextMap.

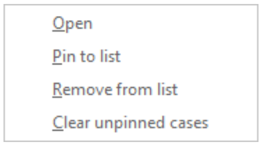
6. In the **TextMap Default Annotation Mode** dialog box, click **Close**.

We recommend you leave the default setting of Manual Mode until you understand and learn how to use Annotation modes. See About annotations.

To open recently viewed cases

1. On the **File** menu, click **Open**, and then select **Recent Cases**.

2. In the **Recent Case** area, click on the case to open. You can also right-click on the case to be opened and from the **Recent Cases** submenu, click **Open**.



A pinned case, designated by a identifies cases that were recently viewed and added to the top of the Recent Cases list.

An unpinned case, designated by a identifies cases that have not been recently viewed. A thin horizontal line separates unpinned cases from recently viewed cases (pinned).

3. Optional: From the **Recent Cases** submenu, click **Pin to list** to place the selected case to the top of the **Recent Cases** list.

4. Optional: Click **Remove from list** to remove a case from the **Recent Cases** list.

5. Optional: Click **Clear unpinned** cases to remove all cases from the **Recent Case** list.

To close a case

On the **File** menu, click **Close** to display to the Getting Started page.

Related Topics

About the Getting Started pane
About cases
Creating cases
Setting/changing case passwords

Setting/changing passwords

Local case passwords can be set for additional security and are distinct to each case. Passwords provide another level of security to your TextMap files.

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. Passwords are not case sensitive. If you forget your password, you need to call CaseMap Technical Support to have them reset it for you.

We recommend that you apply case security at the network folder level. This allows users to keep the default password set to blank, but ensures case security where the case is saved. See Managing case staff.

If you are opening SQL case for the first time, you must use the password provided by your system administrator. You can change your SQL case password after your first login.

If you have TextMap installed on your machine, you can open the example case, Hawkins v. Anstar, without a log on and start experimenting with TextMap in conjunction with the Getting Started tutorial.

To set or change a case password

1. On the **File** menu, click **Case Setup**, and then click **Change Password**.

   If you already have a password, type in the old password in the Old Password box.

2. In **New Password** box, type in your password.
3. In the **Confirm Password** box, type in the same password.
4. Click **OK**.
5. In the message, click **OK**.

   The next time you open the case for which you set the password, you will see a Case Log On dialog box. Select your name from the Staff Member list and enter your password to access the case.

Related Topics

Opening cases
Creating cases
Adding users to cases
Managing case staff

Working with Cases

About cases

A TextMap case is created for each case that your organization works on. A TextMap file is a database that stores all electronic transcript files related to the case. You can create as many TextMap cases as needed to organize your cases. You can also store as many transcripts as you need in each case.

TextMap cases are created using the New Case Wizard, which guides you through answering all the questions needed to create the file. Some of your answers to the New Case Wizard will display within the software application and on reports.

- **Case Name** is the name of the case you are working on. This name is provided on the title bar within the application and on reports that you create.

- **Organization Name** is the name of the organization that is working on the case. This name is listed on reports that you create. TextMap retains the information entered in this box the next time the New Case Wizard is run. If you type over the information in this field, your new entry replaces the highlighted text.
- **File Name** is the name of the file you open whenever you want to open the case. Make sure that the case file name is unique and specific to the case on which you are working. We recommend that you do not use any punctuation in the case file name except the underscore. You cannot use apostrophes, colons, quotation marks, slashes, or asterisks.

  Case files are identified by the column icon and have a file extension of .txmap.

TextMap can only have one case open at a time within an active application window. If you need more than one case open, you can open other instances of TextMap. Case names display in your Windows Title and Status bars so you can differentiate them while working.

TextMap cases are used by multiple staff. Store the case in a shared location on a network drive so more than one staff member can work on annotating and summarizing depositions and transcripts in the case file at the same time.

Related Topics

[Creating cases]
[Adding users to cases]
[Entering case properties]
[Copying cases]
[Moving cases]
[Deleting cases]

Creating cases

Each case you want to include in TextMap requires its own case file. A new case can be created quickly so you can add case staff and initial case data within minutes. TextMap's New Case Wizard provides you with a default new case template that accommodates most of your data entry needs. The example case, Hawkins v. Anstar, uses a new case template.

The case file name is the name of the case database file that is saved to your machine or in a network folder. The default location for case storage is the C:\Users\[User ID]\CaseSoft \TextMap folder on your hard drive. For other users to access the file, it must be stored in a network folder.

TextMap cases hosted on CaseMap Server (SQL cases) must be created by a system administrator. For more information on how to create SQL cases, refer to your CaseMap Server documentation.

New cases are not protected by passwords until you or other users create them. Passwords automatically default to blank, so you would simply type a password and verify it, and then click OK to save it. If you forget your password, you need to call CaseMap Technical Support to have them reset it for you. See Changing case passwords and Managing case staff.

To create cases

1. On the **File** menu, click **New**, and then click **Local Case** to launch the **New Case Wizard**.

   You can also open the New Case Wizard by clicking New Case on the Getting Started pane.

2. On the **New Case Wizard's Welcome** page, click **Next**.

   The Case Setup page opens.

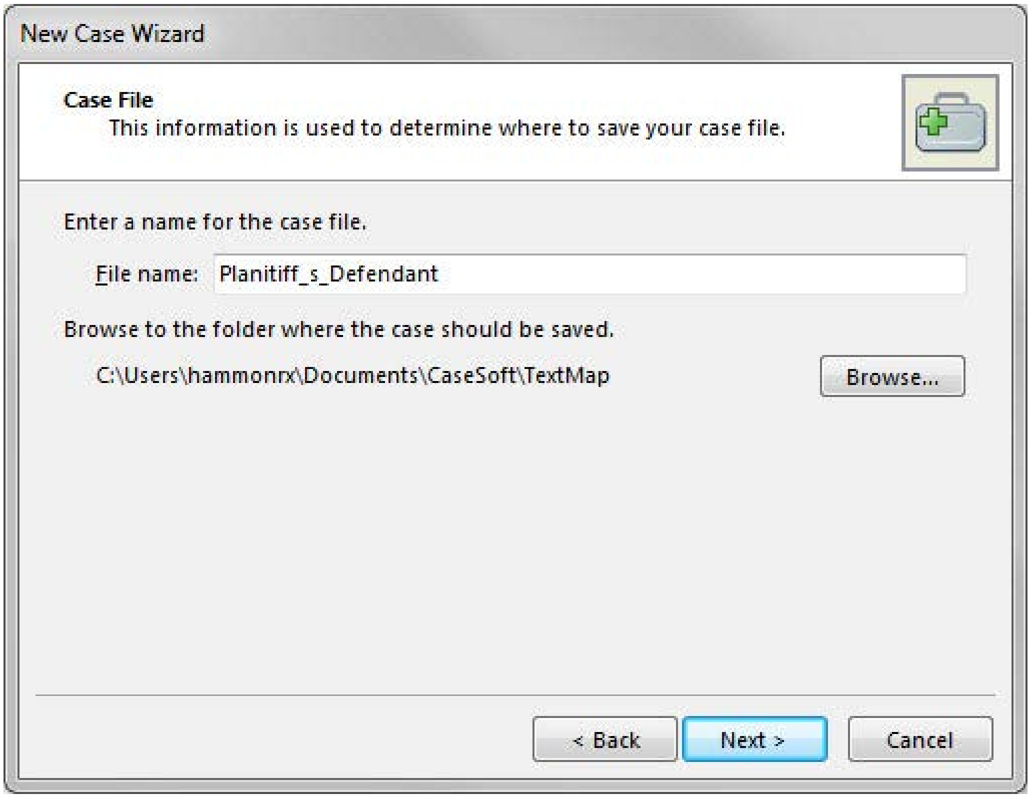
3. In the **Case name** box, type in the case name.

We recommend that you do not use any punctuation in the case file name except the underscore. You cannot use apostrophes, colons, quotation marks, slashes, or asterisks.

4. In the **Organization** box, type in the organization name, and then click **Next**.

   The Case File page opens. The File Name is automatically filled in with the case name.

5. In the **File Name** box, substitute underscores for spaces in the case name so that the result is similar to: Plaintiff_vs_Defendant.



6. Click **Browse** to navigate to the network folder where you want to save case files, and then click **Next**.

   The case file name is the name of the case database file that is saved to your machine or in a network folder.

   The default location for case storage is the C:\Users\[User ID]\CaseSoft\TextMap folder on your hard drive. For other users to access the file, it must be stored in a network folder.

7. In the **Case Staff Support** page, choose one of the following:
   - Click No if you are the only person accessing this case or if you want to add case staff later in Tools > Case Staff.
   - Click Yes if you want to add case staff now. In the Name field type in your first and last name.

     If you click Yes, the Additional Staff members page displays so you can type in case user names here.

8. Click **Next** to continue.

9. On the **Completing the New Case Wizard** page, click **Finish**.

   Your new case automatically launches so you can begin working with it. A TextMap message displays, stating that you do not have any transcripts in your case.

10. In the message, click **OK**.

    You are now ready to add case users or import transcripts in your new case.

Related Topics

About cases
Entering case properties
Copying cases
Moving cases
Deleting cases
Adding users to cases
Setting/changing passwords

Entering case properties

Once you have created a case, you can enter or edit general case details for reference purposes or modify the files paths for exhibits and videos. The case file path is read only.

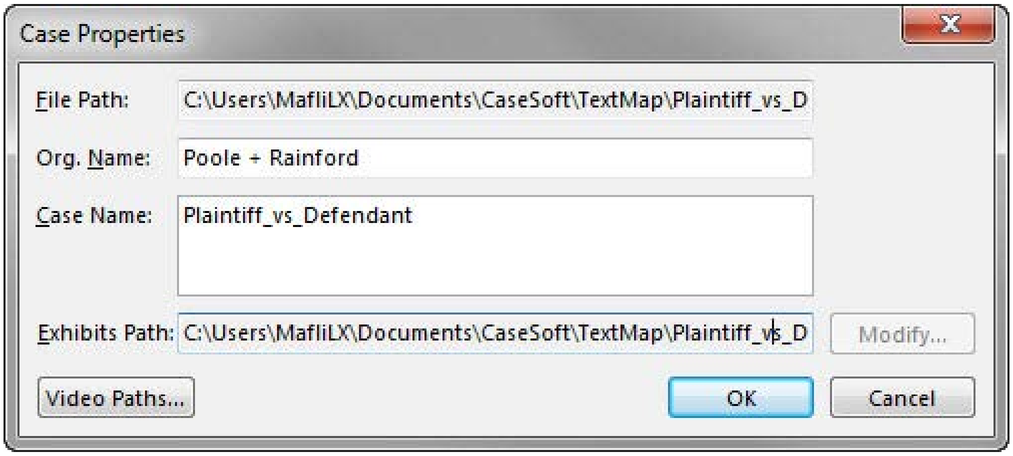
For local cases, TextMap automatically imports exhibits to a subfolder where the case file is stored. This folder may be on your desktop or on your network if other users are accessing case exhibit files. For SQL cases, you can specify the network folder where you want to store exhibit files. See Changing the exhibits folder path for SQL cases.

The video path is where TextMap looks for video files. The Case Video Paths dialog box allows you to add additional file paths to search other locations on your system or network where videos might be stored. See Changing video paths.

You cannot edit Case Properties for SQL cases. You can however change the Exhibits Path by clicking the Modify button and selecting the network folder you would like to use.

To enter case properties

1. On the **File** menu, click **Case Setup**, and then click **Case Properties**.
2. In the **Case Properties** dialog box, verify the file path where the case is saved.



3. In the **Org. Name** and **Case Name** fields, type or edit these entries.

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

Related Topics

About cases
Creating cases

Copying cases

You can copy cases to create custom templates or save a copy of the case for backup purposes. Cases must be closed before you can create a copy of them.

You also can create a replica copy using the Create Replica Wizard. A replica case can be save to a file or a zipped file, and you can attach either to an email. See About replicating/ synchronizing cases.

To copy cases

1. On the **File** menu, click **Open**.

2. In the **Open** pane, select **Computer** or **SQL Case** as applicable to open the storage location of the case to be copied.

3. In the **Open Case** dialog box, right-click on the case you want to copy, then click **Copy**.

4. Navigate to the folder where you want to save the copy, then right-click and click **Paste**.

5. Double-click on the case name to rename it or add the word "copy" to the case name.

6. Click **Open** to launch the case copy.

7. If you do not want to work in the case at this time, click **File** and then click **Close**.

Related Topics

About cases
Creating cases
About replicating/synchronizing cases
Creating replica cases

Moving cases and files

Local cases need to be stored in network folders to ensure that other users can access them in TextMap. When you move a case to another network directory location, you may risk losing links from the case to attached files/documents. The case file and case documents, exhibits, and videos are often stored in separate folders.

If you are planning to move a case file to another network folder, you need to change the file paths to all linked documents, exhibits, and videos. You do not need to change the file path if you imported an .xmef file where the path is using the %CASE_EXHIBITS_PATH%, and the user copies the entire exhibits folder.

To ensure case integrity when moving local case file folders, use the Change Paths Wizard accessible by clicking Case Tools > Linked Exhibits > Change Paths. See Changing exhibit file paths and Changing video file paths. For SQL cases, see Changing the case exhibits path.

To check the integrity of linked exhibits and documents for your case, Verifying linked exhibits.

Related Topics

Entering case properties
Linking exhibits to transcripts
Changing exhibit file paths
Changing the case exhibits path
Changing video file paths
Editing exhibits
Verifying linked exhibits

Deleting cases

If you need to delete a case, you may want to to store a copy in an archive folder on your network. Once you delete a case, you cannot retrieve it. All cases and content are erased from TextMap.

To delete a case

1. On the **File** menu, click **Open**.
2. Navigate to the folder location where the case you want to delete is stored.
3. In the **Open Case** box, right-click on the case and click **Delete**.
4. In the **Confirm File Delete** box, click **Yes**.

   The case and all its contents are now permanently removed from your network and no longer accessible in TextMap.
5. Click **Cancel** or **Close** to close the **Open Case** window and return to TextMap.
6. In the **Getting Started** pane, right-click on the case in the **Open a case** pane and click **Remove** from list.

Related Topics

Creating cases
Copying cases

Adding users to cases

Transcript review often requires a team of staff to help review depositions and transcripts for a case. Having a TextMap license does not allow users to open cases. Staff must be added as users to a case before they can access it within TextMap. New users can be added to a case at any time.

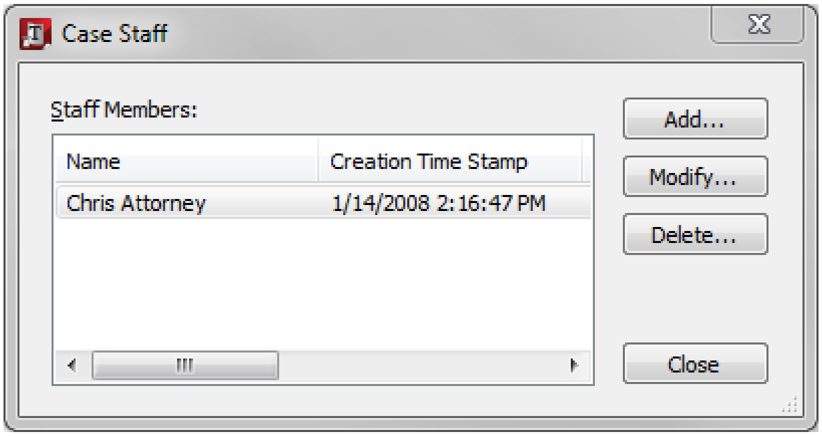
You can add new case staff even if you did not create the TextMap case. Although TextMap suggests typing a first name, followed by last name, your organization can set standards for how staff members' names should be entered. You must have a case open to assign case staff.

There is no limit to the number of users a case can accommodate, though we suggest you keep user access limited to case staff to preserve the integrity of your case data.

For more information on how to create SQL cases, refer to your CaseMap Server documentation. You cannot add, modify, or delete users for SQL cases in TextMap. Managing SQL case staff is done in the CaseMap Admin Console.

To add case users

1. On the **File** menu, click **Case Setup**.
2. Under the **Staff Administration** area, click the **Edit Staff** link to open the Case Staff dialog box.



   The Case Staff dialog box opens. Notice that the user name you used to log on already displays in the Case Staff box.

3. Click **Add**.
4. In the **Add Staff Name** box, type in the user name, and then click **OK**.

   A message states that the password for this user is <blank>.

   Click the Modify button to edit the user name.

5. In the message about the blank password, click **OK**.

   The Case Staff dialog box now lists the new staff member.

6. In the **Case Staff** dialog box, click **Close**.

   The new user can set a password as soon as he or she logs into the case.

   You can continue adding users to the case in this same manner any time.

Related Topics

Creating cases
Deactivating or deleting users
Setting/changing passwords
Managing case staff

Deleting users

If you need to permanently remove a user from a case, you can simply delete them. Deleted users are no longer able to open the case.

To delete a user

1. On the **File** menu, click **Case Setup**.
2. Under the **Staff Administration** area, click the **Edit Staff** link to open the Case Staff dialog box.
3. In the **Case Staff** dialog box, click on the user you want, then click **Delete**.
4. In the message to delete the user, click **Yes**.

   The user is now permanently deleted from the case.
5. Click **Close** when you are finished.

Related Topics

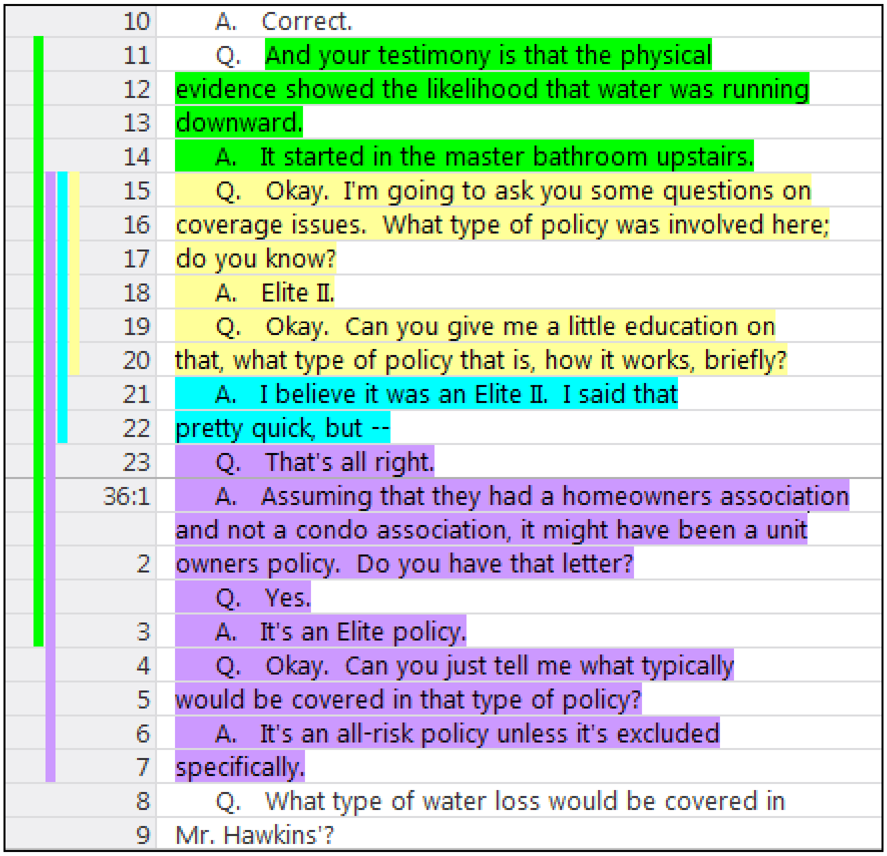
Adding users to cases
Managing case staff

Creating Case Issues

About case issues

If you are using TextMap and CaseMap together you can import your issue outline from a corresponding CaseMap case and then create categorizing issues, like Background, that are only used in the corresponding TextMap case. If you are using TextMap as a stand-alone transcript summary tool, you can quickly create an issue outline from scratch.

In TextMap, all issues are initially set to the default color yellow. You can assign each issue a color so that it can be easily identified when scrolling through the transcript. For instance, you could color code all research items red to be easily recognizable. You can also move topics around in an issues list, arranging issues in a different order. And you can create sub-issues or child issues of the parent issue.


A. Correct.
Q. And your testimony is that the physical evidence showed the likelihood that water was running downward.
A. It started in the master bathroom upstairs.
Q. Okay. I'm going to ask you some questions on coverage issues. What type of policy was involved here; do you know?
A. Elite II.
Q. Okay. Can you give me a little education on that, what type of policy that is, how it works, briefly?
A. I believe it was an Elite II. I said that pretty quick, but --
Q. That's all right.
A. Assuming that they had a homeowners association and not a condo association, it might have been a unit owners policy. Do you have that letter?
Q. Yes.
A. It's an Elite policy.
Q. Okay. Can you just tell me what typically would be covered in that type of policy?
A. It's an all-risk policy unless it's excluded specifically.
Q. What type of water loss would be covered in Mr. Hawkins'?

Once issues are created and coded by color, you can issue-code annotations. Annotations can be linked to one or more case issues. See Creating annotations. Color-coded passages display in reports in color. Reports can be filtered so only annotations associated with specific issues are included. See Printing annotation reports.

When searching transcript annotations, you can narrow your search by selected issues in the Search pane. See Running full-text searches.

Related Topics

Creating case issues
Importing case issues
Deleting case issues

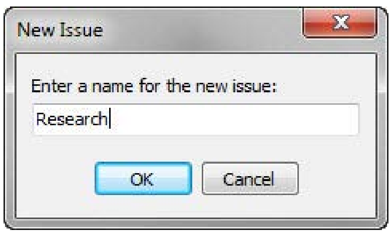
Creating case issues

New case issues are automatically assigned the default color of yellow. You can change the default color in the Color list in the Case Issues dialog box.

Organize your case issues by adding sub-level issues to parent or primary level issue. Color-coding issues helps you identify annotations that are linked to each issue, especially when there overlapping annotations in a particular section of a transcript. See Linking issues to annotations.

To create case issues

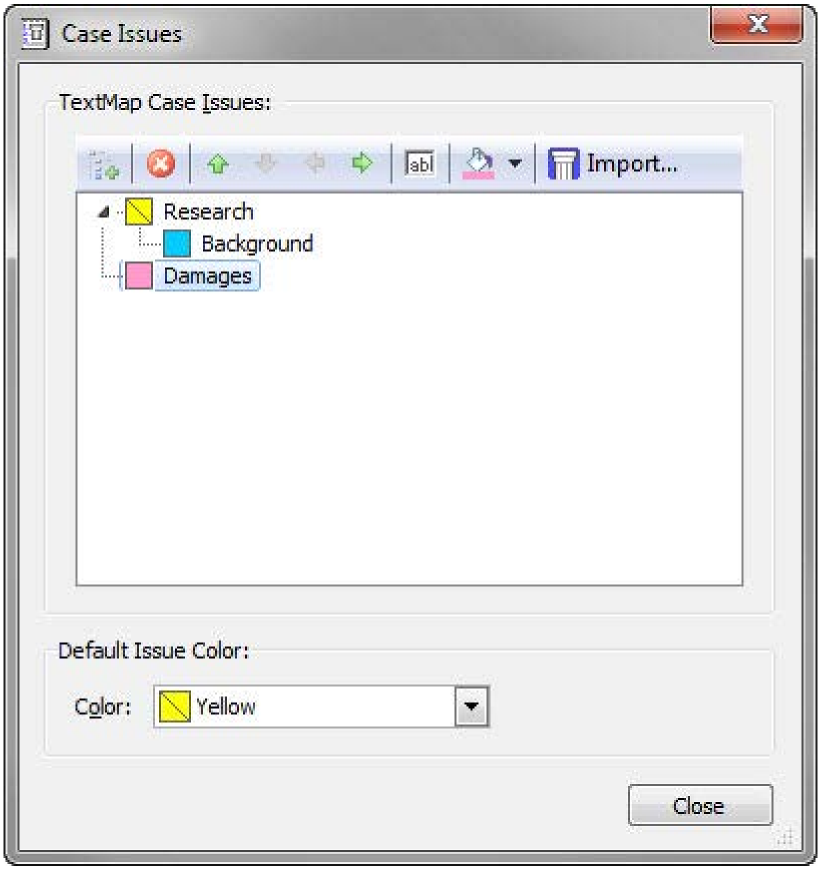
1. On the **File** menu, click **Case Setup**, and then click **Case Issues**.
2. In the **Case Issues** dialog box, click **Add** .
3. In the **New Issue** dialog box, type in the name of the issue, then click **OK**.



The new issue displays in the TextMap Case Issues list in the default issue color of yellow.

> To edit or rename an issue, click on the issue and then click the Rename icon .

4. Continue adding case issues until the issues list is complete.



You can return and add new issues here at any time.

5. Click on an issue and then click the **Demote** icon  to create a sub-level or child issue like Background.

   Click the Move Up, Move Down, Promote or Demote icons to organize the issues list.

If you right-click on an issue in the Case Issues dialog box, a submenu displays with the same options available on the Case Issues toolbar.

6. Click on an issue and then click on the arrow next to the **Color** button .

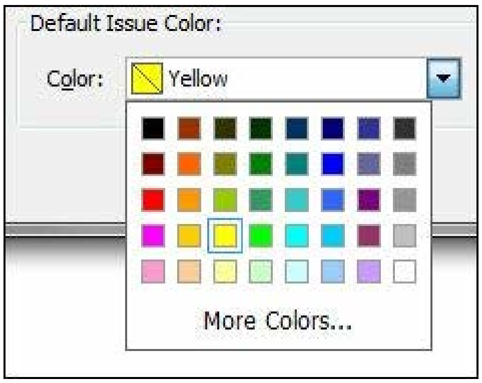
7. In the color palette, click on the new color you want to use for this issue.

All annotations linked to this issue will display in the transcript in the selected color. Transcripts with overlapping annotations will display color bars to the right of the transcript for each linked issue, so you can easily identify where overlapping annotations occur.

8. Click **Close** when you are finished.

To change the default issue color

1. On the **File** menu, click **Case Setup**, and then click **Case Issues**.
2. In the **Color** list, under **Default Issue Color**, click on the color you want.



3. Click **Close** to save your changes.

Related Topics

About case issues
Importing case issues
Deleting case issues

Importing case issues

If you are using TextMap and CaseMap together you can import your issue outline from a corresponding CaseMap case. You must have the corresponding CaseMap case open in order to complete this process.

If you have already imported issues from the CaseMap case into TextMap, any changes in the CaseMap issue hierarchy will not be synchronized in the TextMap case issue list until you re-import the CaseMap issues into the TextMap case. During the import, TextMap tries to match the issues already imported from CaseMap using issue short names. The import will only add new issues in TextMap.

If you rename an issue that was imported from CaseMap, it will not be sent back to CaseMap as a linked issue. When you use the Send to CaseMap utility, TextMap only recognizes linked issue names that are identical to the names created in and imported from CaseMap. If you change the name of an imported issue it will not be recognized or linked to your fact record in CaseMap. TextMap issue names must match the short name of a CaseMap issue (no spaces).

Once case issues are imported, you will need to change the issue color for each so linked annotations can be distinguished by issue color when viewing the transcript.

Importation of issues from CaseMap is a one-way street. Issues added in CaseMap and linked to annotations in TextMap will be sent back to CaseMap as Linked Issues on new facts created from annotations in TextMap. TextMap-generated issues are not recognized by CaseMap.

The import/export structure is useful, especially if you create issues in TextMap like Background or Possible Impeachment that are not related to the legal claims set forth in CaseMap's Issues spreadsheet. In Annotation Digest reports generated in TextMap, you can filter for annotations linked to any of the TextMap issues — those imported from CaseMap and those created in TextMap.

If you want to ensure your TextMap issues are sent to CaseMap as linked issues in a new fact record, then add new issues you want in your TextMap issue outline into the CaseMap Issues spreadsheet first. Next import issues from CaseMap into your corresponding TextMap case. Any new CaseMap issues will be imported into TextMap and added to the bottom of the case issues outline.

To import case issues

1. On the **File** menu, click **Case Setup**, and then click **Case Issues**.
2. In the **Case Issues** dialog box, click the **Import** icon Import... .
3. In the message box, click **Yes**.

   Apply issue colors to each imported case issue as needed.
4. Click **Close** when you are finished.

Related Topics

About case issues
Creating case issues
Deleting case issues

Linking issues to annotations

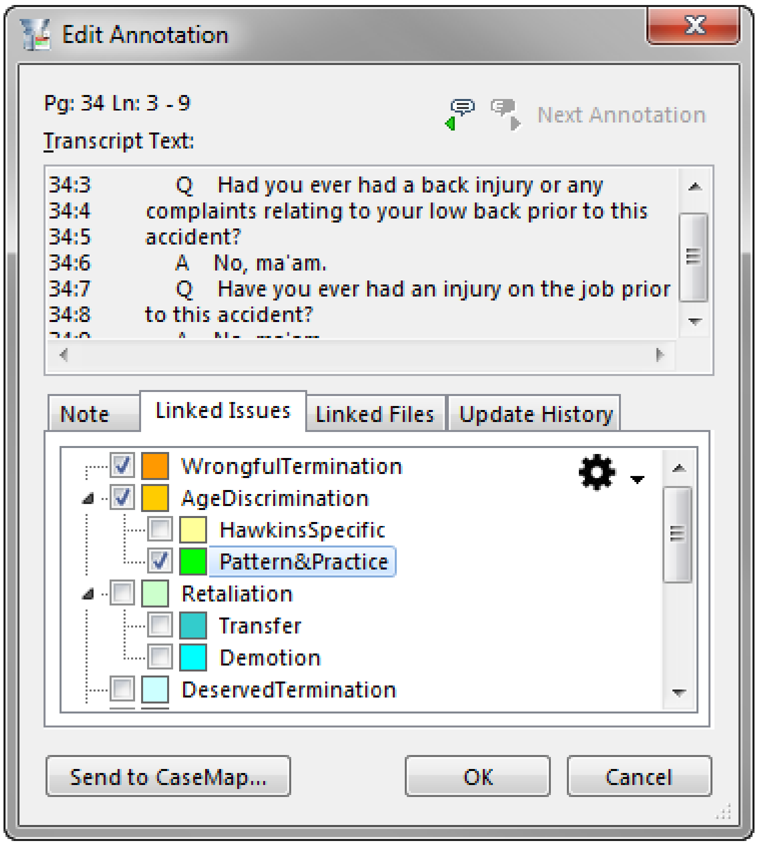
Once you have created your case issues list, you can issue-code any existing annotations already applied to your transcripts.

However, it is also easy to link issues to annotations while you are annotating. See Creating annotations.

To link an issue to an existing annotation

1. In the **Annotations** pane, double-click on the annotation for which you want to apply an issue.

2. In the **Edit Annotation** dialog box, click the **Linked Issues** tab.



3. On the **Linked Issues** tab, select the check boxes for each issue and/or sub-issue that applies to the annotation.

   The Linked Issues tab automatically displays the last issue selections to minimize issue selection when creating annotations.

   Click on the Issues Option button and select one of the following:

   - Select All Issues to place a check mark beside all issues
   - Deselect All Issues to remove the check mark beside all selected issues
   - Manage Issues to open the Case Issues dialog box.

If an annotation is linked to more than one issue, the color of the issue that's the highest in the issue outline hierarchy (that is not the default color) will be applied to the annotation.

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

   The selected issues now display in the Linked Issues column in the Annotations pane.

Related Topics

[About case issues]
[Creating case issues]
[Creating annotations]

Deleting case issues

If you want to delete a case issue, you first need to verify whether the issues is currently linked to any transcript annotations. If the issue is linked to annotations, then you must transfer the annotations to another case issue before deleting the issue you want removed from the issue list.

This process is managed by the Delete Issue Wizard, which offers you the option of moving the links to an existing issue or deleting the annotation links to the case issue you want to delete. The wizard displays how many annotations are linked to the issue.

Deleting a case issue linked to an annotation will not delete the annotation. The annotation color will then change to the selected default color.

You cannot delete a parent issue that has sub-issues. You must first move any annotation links to another issue and then delete the sub-issues.

To delete a case issue

1. On the **File** menu, click **Case Setup**, and then click **Case Issues**.

2. In the Case Issues dialog box, click on the case issue you want to delete.

3. Click the **Delete** icon .

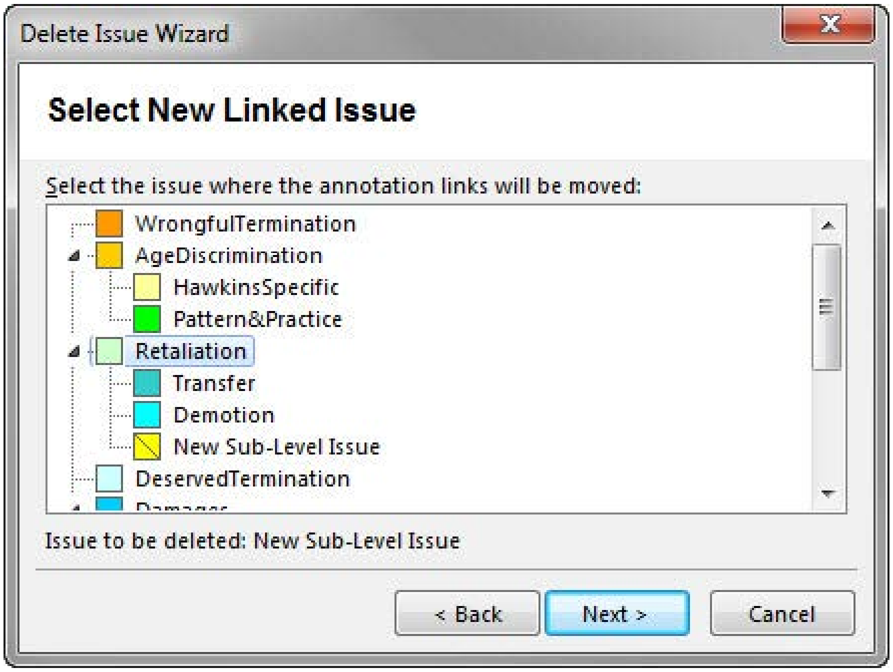
4. In the message box, click **Yes** to delete the issue.

   If the issue is linked to annotations, the Delete Issue Wizard launches so you can move or delete annotations links.

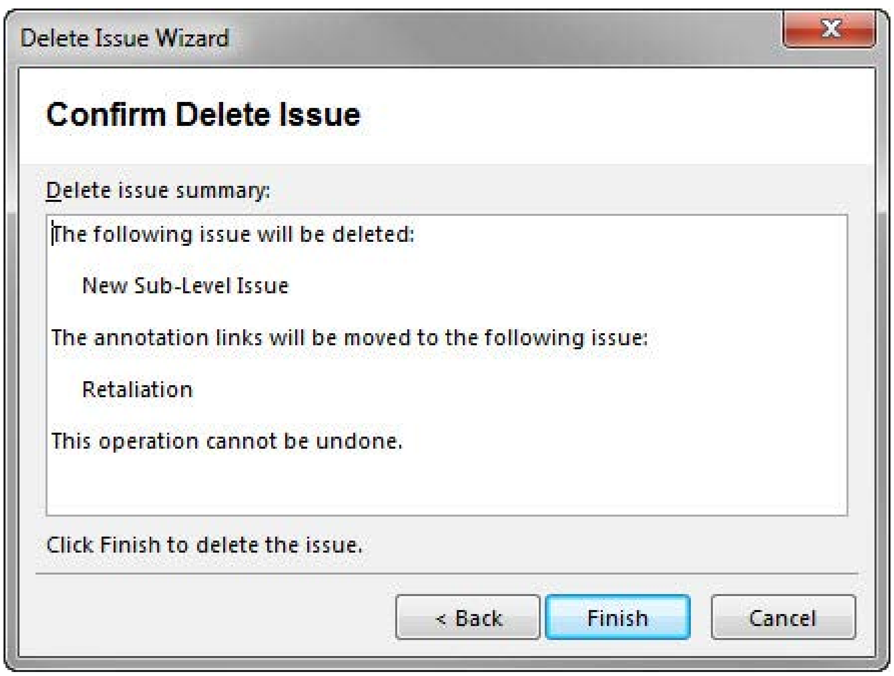
   To move links to another issue

   1. On the **Welcome** page, click **Move links to another issue**, then click **Next**.

   2. On the **Select New Linked Issue** page, click on the issue for which you want to transfer the links, then click **Next**.



3. On the **Confirm Delete Issue** page, verify the information, then click **Finish**.



4. In the **Annotations** pane, verify that the annotation is now linked to the new issue selected.

To delete annotation links

1. On the **Welcome** page, click **Delete annotation links**, then click **Next**.
2. On the **Select New Linked Issue** page, click on the issue for which you want to transfer the links, then click **Next**.
3. On the **Confirm Delete Issue** page, verify the information, then click **Finish**.
4. In the **Annotations** pane, verify that the annotation is now linked to the new issue selected.

5. In the **Case Issues** dialog box, click **Close**.

Related Topics

About case issues
Creating case issues

Importing Data

About importing data

TextMap organizes imported transcripts and depositions into a centralized electronic case where you and other case staff can share comments, insights, research ideas, notes, links, and documents. Once the transcripts and documents are added to a TextMap case, they are in one location that makes it easy for you to find topics of interest, mark interesting passages, and link to files. There is no limit to the number of files or size of files that you can import into a TextMap case.

When transcripts and documents are imported, TextMap tracks words and their locations in a list called a case index. The case index alphabetizes words in all of the transcripts and also contains hyperlinks to the locations in the transcript where the words display. Not all words are included in the case index: the most common ones, such as and, or, the, and but are not in the case index. See About the case index.

TextMap locates the first date in a transcript or document and uses that date in the Transcript Import Preview dialog box. TextMap recognized dates in the DD/MM/YYYY format. For example, TextMap recognizes both 01/20/99 and January 20, 1999.

The most common way to import information into TextMap is by importing a file in an ASCII text file. This allows the line numbering and page numbering of the original transcript to be the same as the transcript inside TextMap. If you are receiving transcripts in a Binder format, you can open the file and save it as a text file for importing into TextMap.

You can also import the following file types:

- .mdb (Sanction)
- .pcf (LiveNote Portable Case File)

- .pdf (Adobe Portable Document Format)
- .ptf (LiveNote Portable Transcript File)
- .txt (Amicus)
- .txt (Summation)
- .xmef (TextMap Evidence Format)
- .xmptf (TextMap Portable Transcript File)

TextMap does not directly import files provided in RealLegal E-Transcript Binder Format (.ptx). Open files in .ptx format using Legal Binder or Viewer, and then save the transcripts as text (.txt) files. You can then import the new .txt files. Formatting does not change in this process.

TextMap also has a feature that allows you to import information from a software Clipboard to TextMap. This allows you to import information from many file types into TextMap. See Importing files from a Clipboard.

You can also update or append existing transcripts in the case. See Updating or appending transcripts.

To learn more about importing other data, see the following topics:

- Importing annotations
- Importing data from an iPad
- Importing exhibit packages
- Updating or appending transcripts
- Batch importing cases
- About CaseViewNet

Related Topics

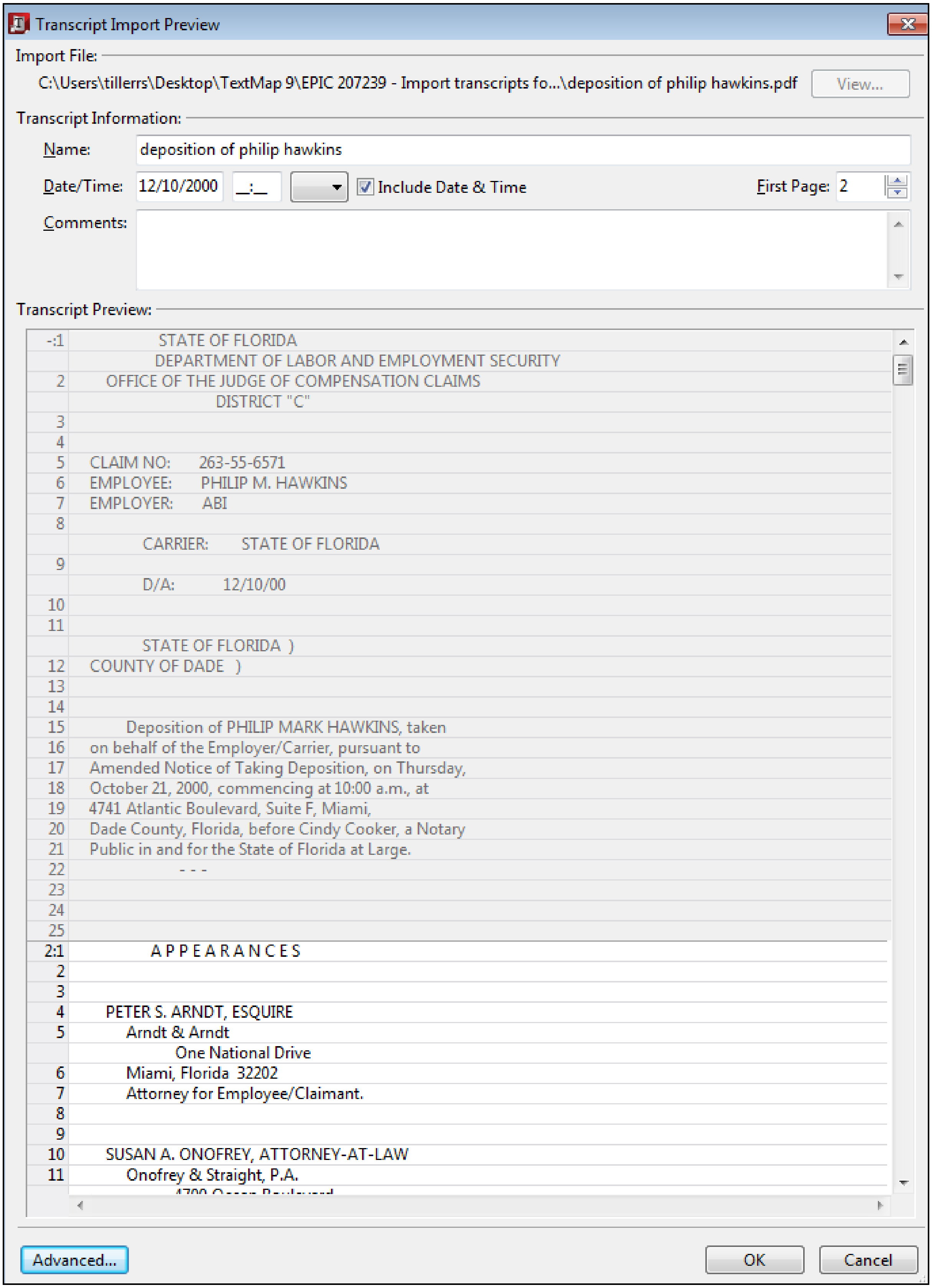
Importing transcripts
Importing files from a Clipboard
Updating or appending transcripts
Batch importing cases

Importing transcripts

Once you've created a case, you must import transcripts into it before you can begin to search them to make annotations or cull out facts to send to CaseMap. Transcripts display in the main Transcript window (center pane) with page and line numbers displaying in the left margin. The left margin also displays annotation note icons and linked attachments (paperclip icon). Any annotated text that overlaps previously annotated text displays with colored bars to the left of the transcript. See About annotations and Creating annotations.

When importing transcripts, TextMap scans the first two pages of a transcript to locate a date. TextMap uses the first date it finds as the transcript default date and displays it in the Transcript Import Preview dialog box. This date can be edited if needed. To turn on page number display, click File, click Options, and then click the Transcripts tab. On the Transcript tab, select the Show page number in gutter area check box.

During the import process, you can select the Advanced option in the Transcript Import Preview dialog box to specify any pages to skip as well as set the first page number. The transcript preview automatically displays the page(s) shaded indicating the page(s) are skipped.


Transcript Import Preview
Import File:
C:\Users\tillerrs\Desktop\TextMap 9\EPIC 207239 - Import transcripts fo...\deposition of philip hawkins.pdf
View...
Transcript Information:
Name: deposition of philip hawkins
Date/Time: 12/10/2000
Include Date & Time
First Page: 2
Comments:
Transcript Preview:
STATE OF FLORIDA
DEPARTMENT OF LABOR AND EMPLOYMENT SECURITY
OFFICE OF THE JUDGE OF COMPENSATION CLAIMS
DISTRICT "C"
CLAIM NO: 263-55-6571
EMPLOYEE: PHILIP M. HAWKINS
EMPLOYER: ABI
CARRIER: STATE OF FLORIDA
D/A: 12/10/00
STATE OF FLORIDA)
COUNTY OF DADE)
Deposition of PHILIP MARK HAWKINS, taken
on behalf of the Employer/Carrier, pursuant to
Amended Notice of Taking Deposition, on Thursday,
October 21, 2000, commencing at 10:00 a.m., at
4741 Atlantic Boulevard, Suite F, Miami,
Dade County, Florida, before Cindy Cooker, a Notary
Public in and for the State of Florida at Large.
- - -
A P P E A R A N C E S
PETER S. ARNDT, ESQUIRE
Arndt & Arndt
One National Drive
Miami, Florida 32202
Attorney for Employee/Claimant.
SUSAN A. ONOFREY, ATTORNEY-AT-LAW
Onofrey & Straight, P.A.
Advanced...
OK
Cancel

The creation date of each imported annotation matches the original date in LiveNote, rather than the date and time it was imported.

TextMap also accounts for front and back unnumbered pages during transcript import. Cover sheets, initial pages, end pages and appendices do not affect the numbering of testimony pages. If TextMap detects unnumbered pages prior to the import, you can adjust the number of pages or accept the automatic handling of the unnumbered pages provided by TextMap.

Headers and footers are automatically left out of imported transcripts. For example, if a court reporter uses the bottom two lines of every page for a name and office number, then the actual testimony imported is 23 lines per page instead of 25.

Once a transcript is imported, you can specify a new first page number. Any annotation(s) in the transcript prior to the number change contains the exact text as prior to the page numbering change.

You can also adjust the font size and style for better viewing in the TextMap window. The selected font size and style is applied to all case transcripts. See Changing transcripts fonts.

When importing transcripts into a case, the transcripts should be full-sized, single page, and OCRd for best results.

TextMap displays a message when the format of the file you are importing doesn't appear to be in a standard court reporting electronic transcript format. If you continue with the import the page breaks and line numbering probably will not match the original document. You're encouraged to discontinue the import and to contact your court reporter to request the transcript in either Amicus® or Summation® format, standard transcript output formats from court reporting software.

When importing transcripts into a SQL case, you will not be able to run searches (word searches or advanced queries) until the indexing process is complete. A message box displays to indicate processing status and completion. During the import process, you are able to review and annotate transcripts. However, you and other case staff cannot delete transcripts or synchronize cases. Likewise, you cannot import transcripts while another user is synchronizing a replica case with the master case, or is in the process of deleting transcripts from the case.

To import transcripts

1. On the **Home** ribbon, click **Import Transcript**.

   You can also click Import on the File menu, and then click Import Transcripts.

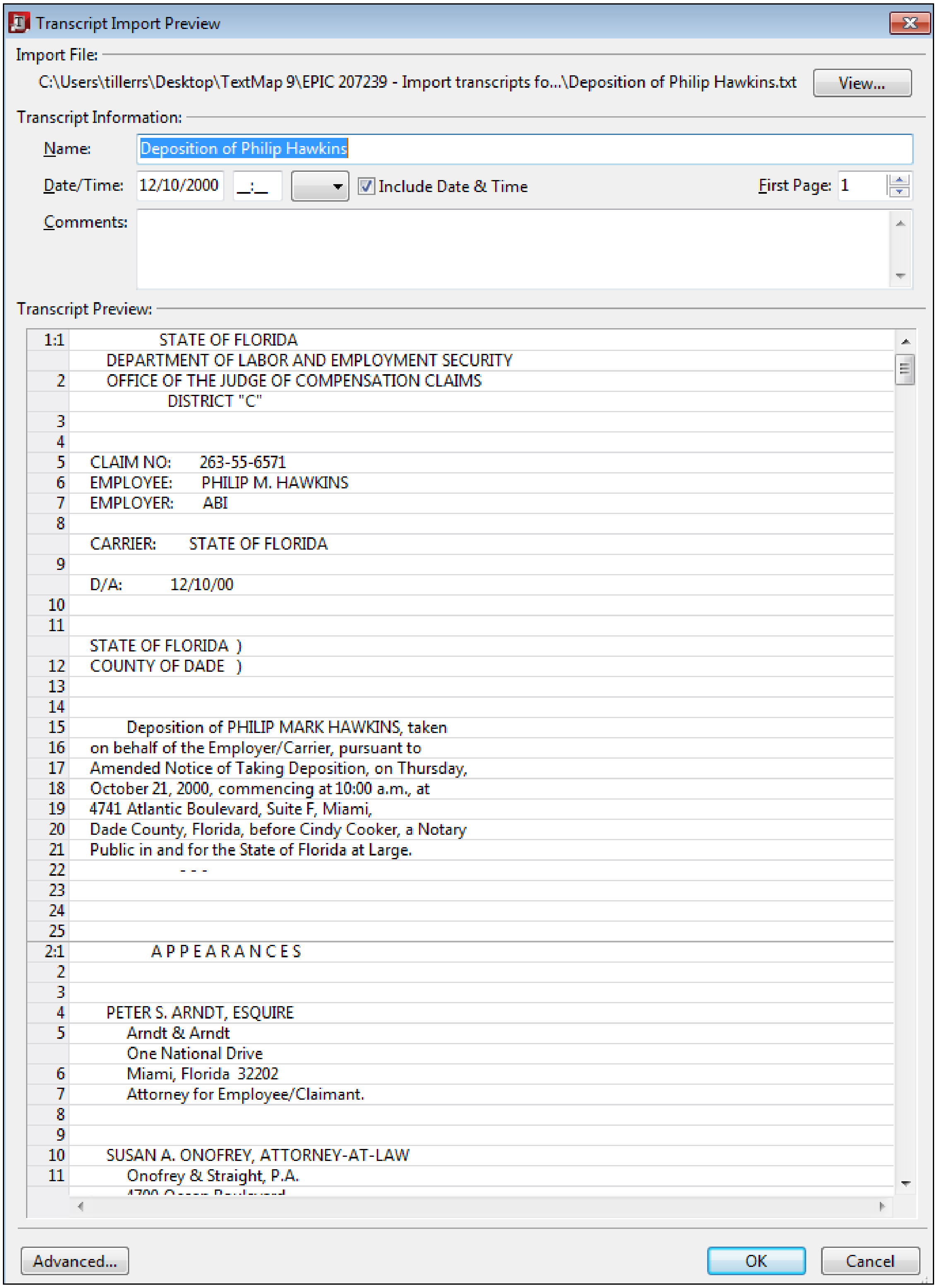
2. In the **Select One or More Transcripts to Import** dialog box, navigate to the folder where the transcript files are stored.

3. Select the transcripts you want to import and then click **Select**.

   If you want to import more than one file at a time, press the CTRL key while selecting the files you want to import.

The Transcript Import Preview dialog box displays.

The Name box contains the file name of the transcript that you are importing.



4. In the first **Date/Time** box, notice that the date is automatically filled in for you.

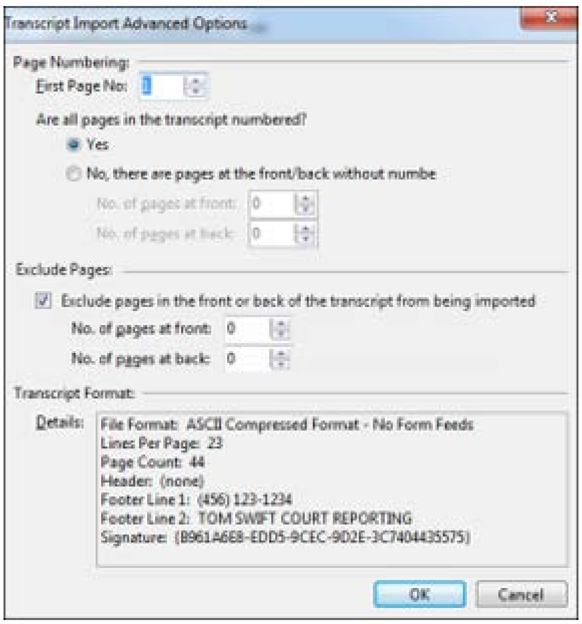
5. In the second **Date/Time** box, type in the time, then select **AM** or **PM** from the list.

   Notice that the Include Date & Time box is selected by default. Clear this check box if you do not want the date/time to display in the Transcripts pane along with the transcript name.

6. In the **Comments** box, type in any relevant information about the transcript.

7. In the **Transcript Preview** box, scroll to verify that the transcript displays properly.

8. Click the **Advanced** button to modify page numbering, exclude pages, and format details.



9. Click **OK** to continue.

   The Transcript Import Preview dialog box is displayed for each transcript you are importing.

10. In the **Transcript Import Preview** dialog box, repeat steps 4-7 for the next transcript.

    Notice how a progress filter displays while the case index is created or updated.

    Imported transcripts now display in the Transcripts pane with the first transcript content displaying in the TextMap window.

Related Topics

About importing data
Importing files from a Clipboard
Updating or appending transcripts

Importing annotations

The Import Annotations Wizard allows you to import annotations from a comma delimited text file (.csv) file saved from a Microsoft® Excel spreadsheet without having to do it manually. The Import Annotations Wizard can import multiple annotations into multiple, existing transcripts. The wizard imports page/line number and note designations, and allows the ability to link issues to imported annotations so they can be tagged.

In order to successfully import annotations, the .csv file's columns must be in the following, specified order: Transcript Name, Page From, Line From, Page To, and Line To. The file may also include the Notes and Issues column (optional). This list of issues should be separated by semicolons. The wizard's Welcome page includes a link to view a sample import file (shown below).

Transcript	Pg From	Ln From	Pg To	Ln To	Notes	Issu
Deposition of P...	30	4	30	11	HawkinsP says t...	Wr
Deposition of P...	27	6	27	11	HawkinsP does ...	Ret
Deposition of P...	29	1	29	9	HawkinsP's sala...	Der
Deposition of P...	25	24	26	2	Date of surgery	Dar
Deposition of S...	35	15	35	18	Type of policy	Ret
Deposition of S...	36	1	36	7	Homeowner's a...	Der

If you import the same .csv file twice, you will duplicate content in the case. The Import Annotations Wizard will display an Import Errors page if some annotations fail to import. We recommend that you save this information to a file, resolve the errors, and then import the skipped annotations as a separate .csv file.

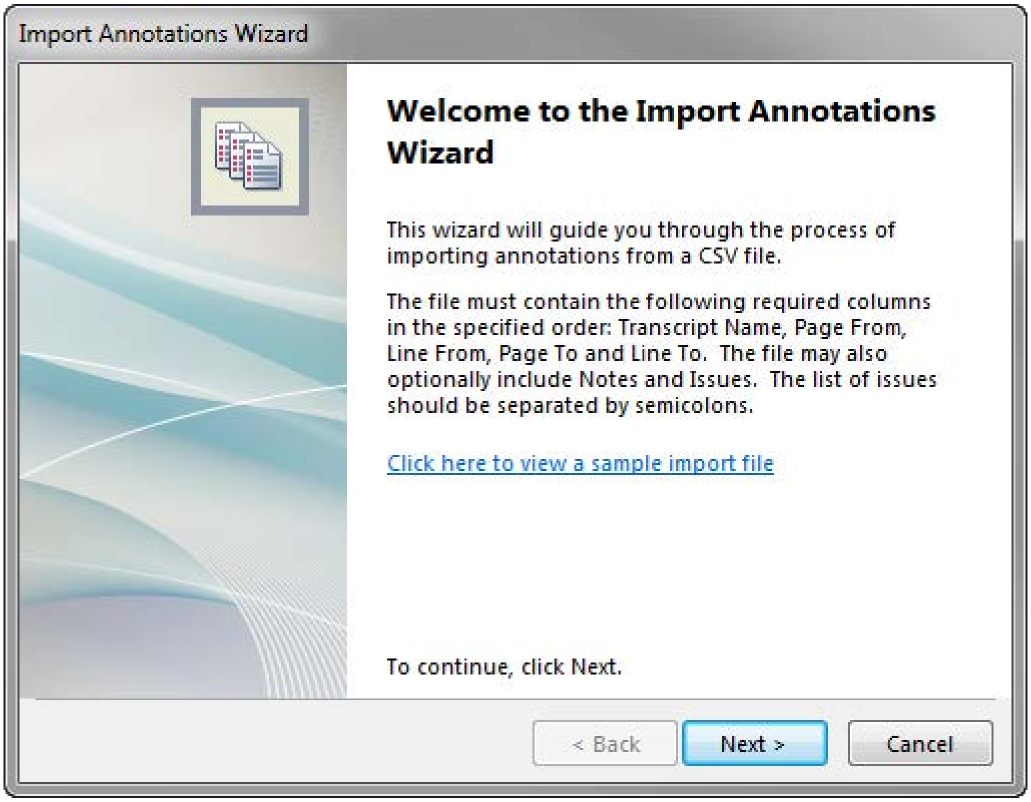
If an annotation in has "Unknown" listed in the Created By column, it may be an imported annotation. These annotations can be assigned to a case user after the import. See Changing annotation owner status.

To import annotations into existing transcripts

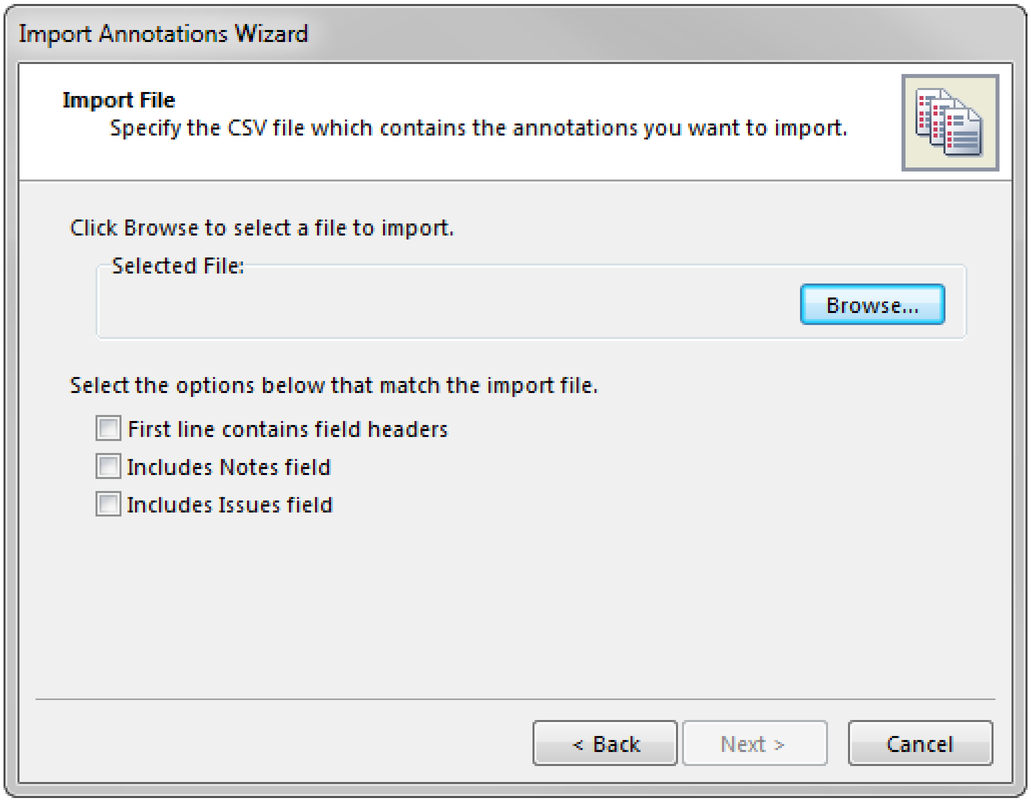
1. On the **Home** ribbon, click **More Import**, and then click **Import Annotations**.

   You can also click Import on the File menu, and then click Import Annotations.

2. When the wizard launches, click **Next**.



3. On the **Import File** page, click **Browse** to locate the file you want to import.



4. After the selected file and path of the file(s) being imported is displayed in the wizard, select/deselect all applicable options (e.g., First line contains field headers), to indicate what (i.e., notes, issues) is in the file(s) being imported):

   First line contains field headers -- The first line of the import file contains the field headers (i.e., Transcript, Pg From, Ln From, etc.) and not the first annotation.

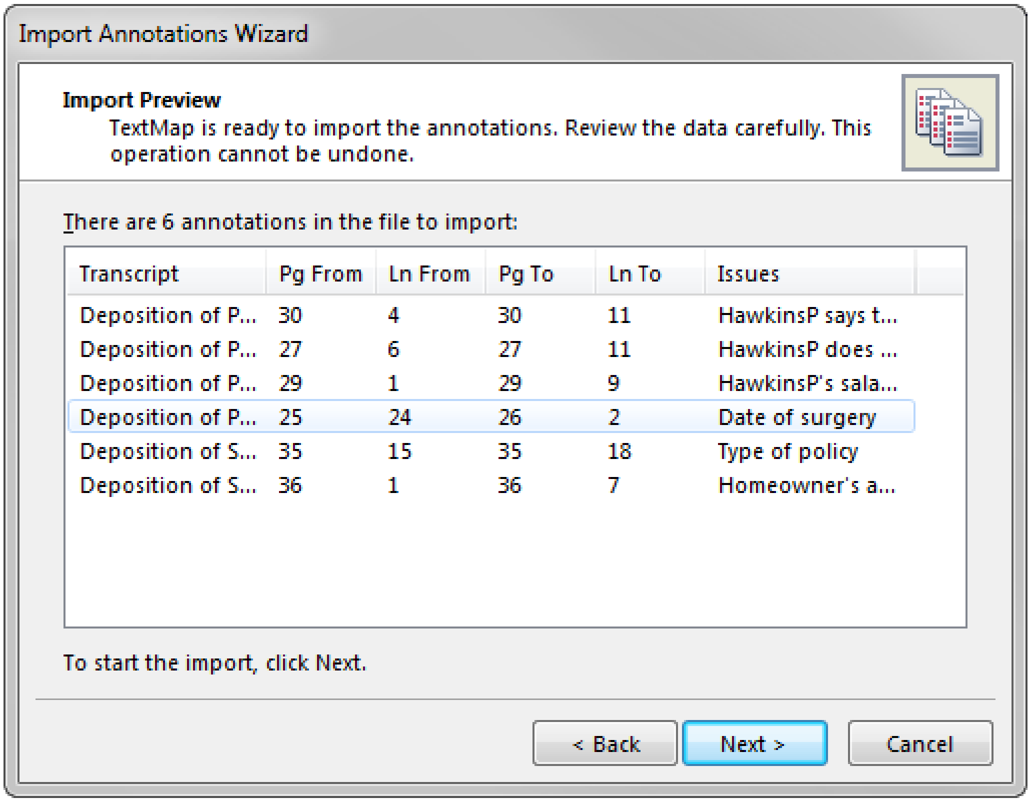
   Includes Notes field -- Import file includes a field to list the note(s) associated with each annotation.

   Includes Issues field -- Import file includes a field to list the issue(s) associated with each annotation.

These options must match what is in the import file in order for the annotations to import correctly. If a check box (e.g., Issues or Notes) is not selected, it will not be displayed in the Import Preview window.

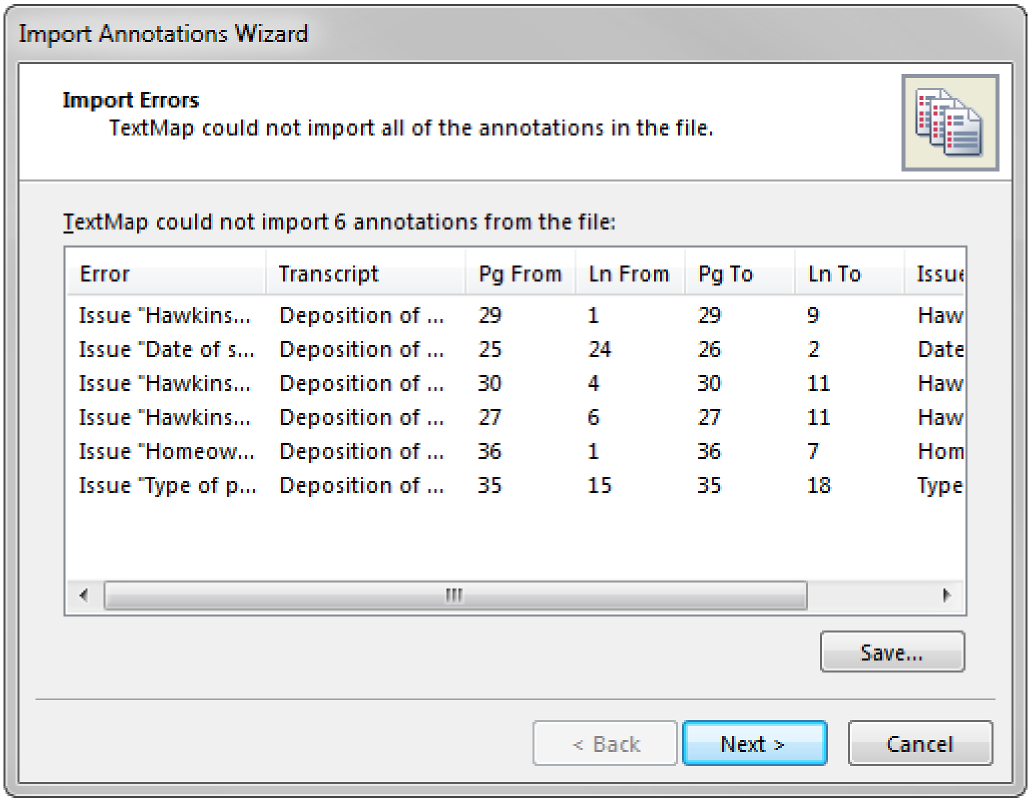
5. Click **Next** to display the Import Preview page.

6. On the **Import Preview** page, review the annotations selected for import, then click **Next** to start the import process.



Since the Include Notes field option was not selected in Step 4, only Issues are displayed in the Import Preview window.

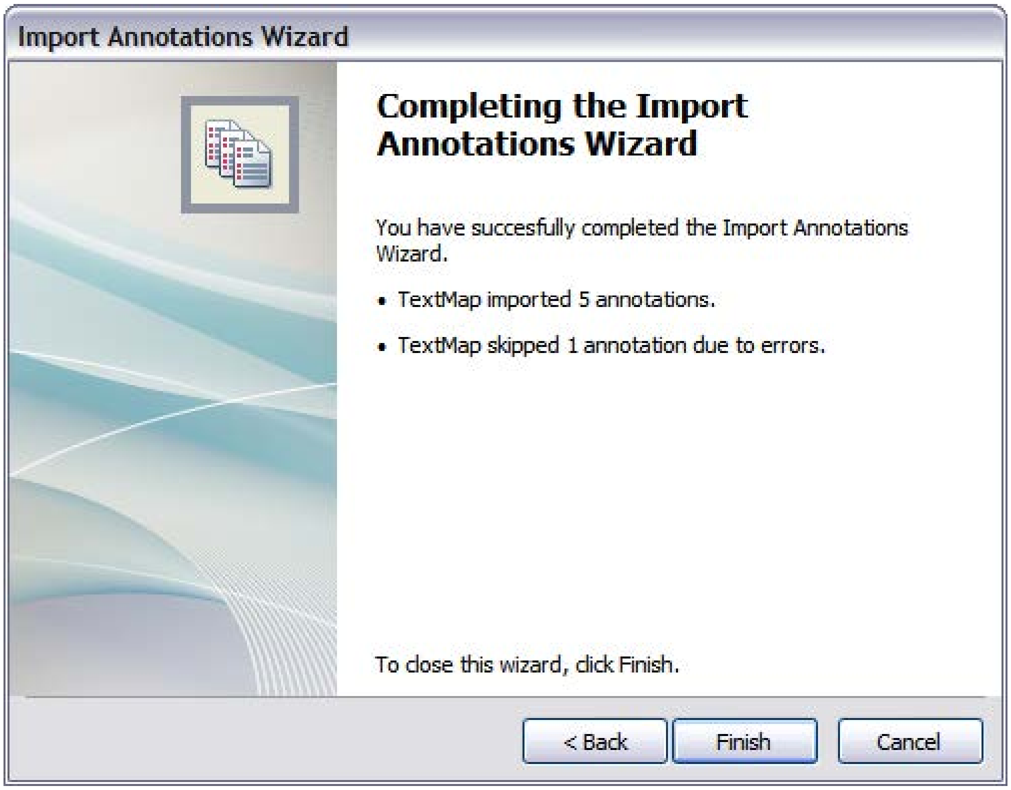
If any annotations cannot be imported (e.g., transcripts with the same name), the wizard displays an Import Errors page listing all annotations that did not successfully import.



7. Optional: Click the **Save** button to save a list of the import error list for future reference.

8. Click **Next** to continue.

9. On the **Completing the Import Annotations Wizard** page, review the number of imported annotations and those skipped due to errors, then click **Finish**.



The imported annotations now display in the Annotations pane. When you click on an annotation in the Annotations pane, the transcript displays the annotated content with the applicable issue code color, if issues were included were included in the .csv file.

Related Topics

About annotations
Creating annotations

Importing data from an iPad

The importing process applies any edits you made in the TextMap app for iPad to the master case in TextMap. You must have the corresponding case open in TextMap before you can import updates from the iPad. Only one case user at a time can import updates.

An import confirmation indicates how many new issues and annotations will be added. The message also lists how many annotations have been edited or deleted and how many transcripts in the case are affected by the changes.

During the import process, TextMap will recognize if your updates have already been applied. See the iPad Import Considerations table for details on how TextMap processes updates in the master case.

You can re-export the case to your iPad if you want to access any case user updates or new transcripts added to the case. Otherwise, you can continue to work on the transcripts you already have on your iPad.

To view data import considerations

Reference the following table for considerations when importing case updates from your iPad.

iPad Import Considerations	
General	Only one case user at a time can import updates. TextMap displays a message if another case user is currently importing updates from the iPad or synchronizing a replica with the master case.
	You can import updates from your iPad as many times as you want. TextMap will recognize any case data that was already updated or skipped during a previous data transfer. * You may want to email the case to your iPad again if you want access to all case user updates or any new transcripts added to the case.
	Case updates made on an iPad can be imported into a replica case. TextMap will recognize that the case updates from the iPad were made in the replica when synchronizing the replica with the master case. See About replicating and synchronizing cases.
	After a significant number of updates are made on your iPad, it's a best practice to import your updates into the master case. This ensures that you and other case users have access to the latest case data at all times.
	You can choose to skip importing previous updates if the latest update includes all the data you want.
Case Issues	New parent (top-level) issues created on an iPad are added to the bottom of the TextMap's issue outline.
Annotations and Notes	Annotations edited on the iPad but were deleted in the master case will be imported back into the master case. TextMap counts these as new annotations and not edited annotations.
	Annotations created on the iPad will be skipped during the import if the transcript has been deleted from the master case. The number of skipped annotations displays in a message during the import.
	Annotations deleted on the iPad will be deleted in the master case, even if the original annotation was edited. The total number

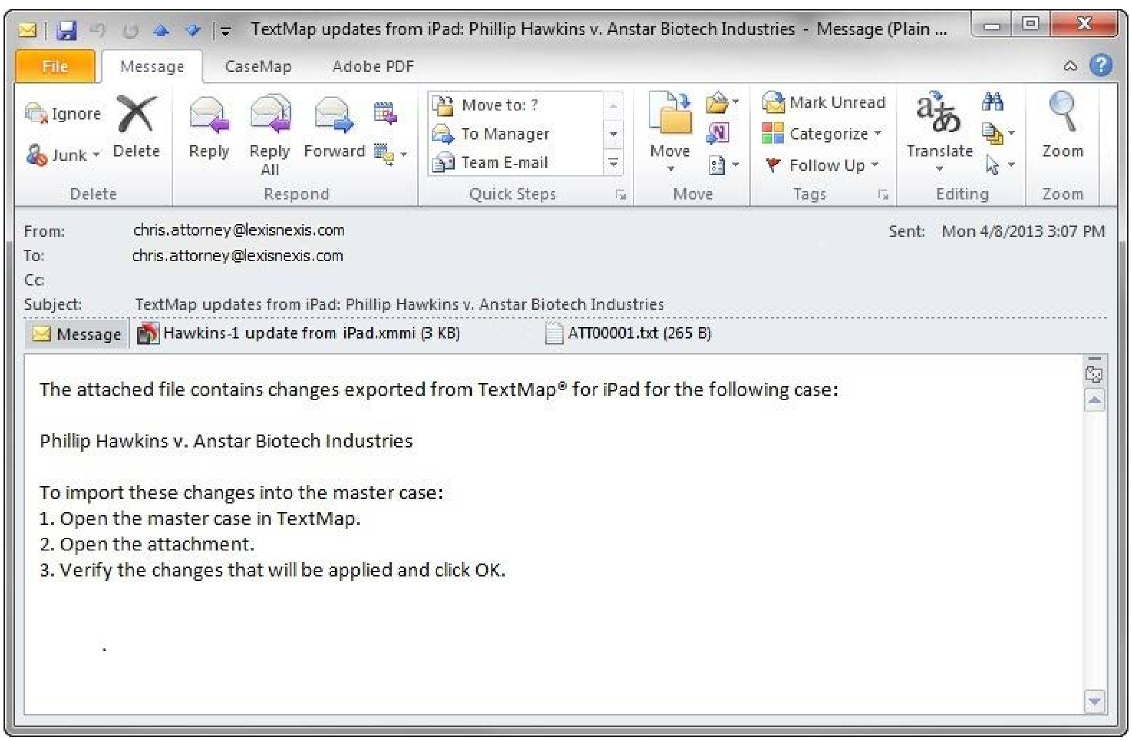
iPad Import Considerations	
	of annotations deleted across all transcripts will be listed in the import message.
	Any annotation issue links that are deleted on the iPad will be deleted in the master case during the import.
	Any linked issues added in the master case since case data was exported will be retained in the master case.
	Existing annotations with notes updated on the iPad will override notes made in the master case.

To import TextMap app updates from your email

1. Click **More Import** on the **Home Ribbon**, and then click **Import from iPad**.

   You can also click Import on the File menu, and then click Import from iPad.

2. From the **Select TextMap Mobile Import File** dialog box, open the email that contains the case updates that you want to import from the TextMap app.



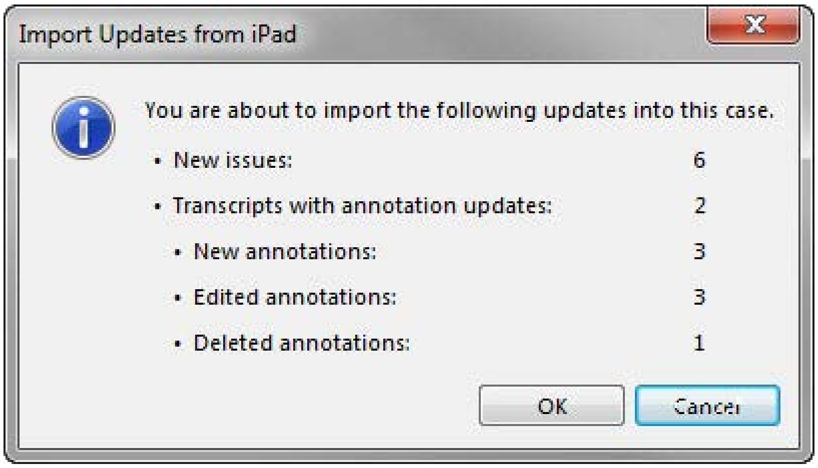
3. Open the master case in TextMap, if it is not already open.

4. Double-click on the email attachment to open it.

5. In the **Opening Mail Attachment** dialog box, click **Open**.

   Click Save if you want to save the case updates to a file to import later, then close the email.

6. In the **Import Updates from iPad** dialog box, review the issues and annotation updates, then click **OK**.



   The imported data now displays in your transcripts in the master case.

To import updates saved to a file

You can also import case updates directly from the .xmmi file, if you chose to save the attachment to a folder to import at a later time. If a TextMap case is not already open, a dialog box displays for you to browse to and select the existing or recent case you want to open. Once the case is open in TextMap, the import process automatically starts. If the corresponding TextMap case is already open, click OK in the message box to initiate the import.

1. On the **File** menu, click **Import** and then click **Updates from iPad**.
2. In the **Select TextMap Mobile Import File** dialog box, navigate to the folder where the import file is stored.

> You can also right-click on the file in the folder where it is stored and then click Import into TextMap or simply double-click on the file to initiate the import.

3. Select the import file and then click **Open**.
4. In the **Import Updates from iPad** dialog box, review the issues and annotation updates, then click **OK**.

Related Topics

About the TextMap iPad app
Exporting data to an iPad

Importing exhibit packages

TextMap Exhibit Packages (created by TextMap® Exhibit Linker) include a transcript, hyperlinks to exhibits mentioned throughout the text, and the linked exhibit documents. You import an Exhibit Package file (*.xmef) just like any other transcript. All the exhibits and exhibit hyperlinks in the transcript are available instantly.

When you import an Exhibit Package file (*.xmef), the following occurs:

- It creates a folder and is stored in its own folder.
- If the name of the transcript is longer than 80 characters, the folder created will also be truncated at 80 characters.
- When TextMap imports a transcript with a name of one that already exists, it and the associated folder names are made unique by applying a number to the end.
- Invalid characters are not allowed in the transcript name, and will be removed.

You can also import TextMap Exhibit Packages (*.xmef files) with linked exhibits into a SQL case. During the import process, TextMap displays a message for you to select the exhibits path folder for the case, if it has not already been set.

Exhibit files should be saved to a network folder to ensure that all case users have access to the files. You can also set this path in the Case Properties dialog box, if you have permissions to do so. See Changing exhibits file paths. If you choose not to set the exhibit folder path during the import, the transcript will be imported into the SQL case without the linked exhibit files.

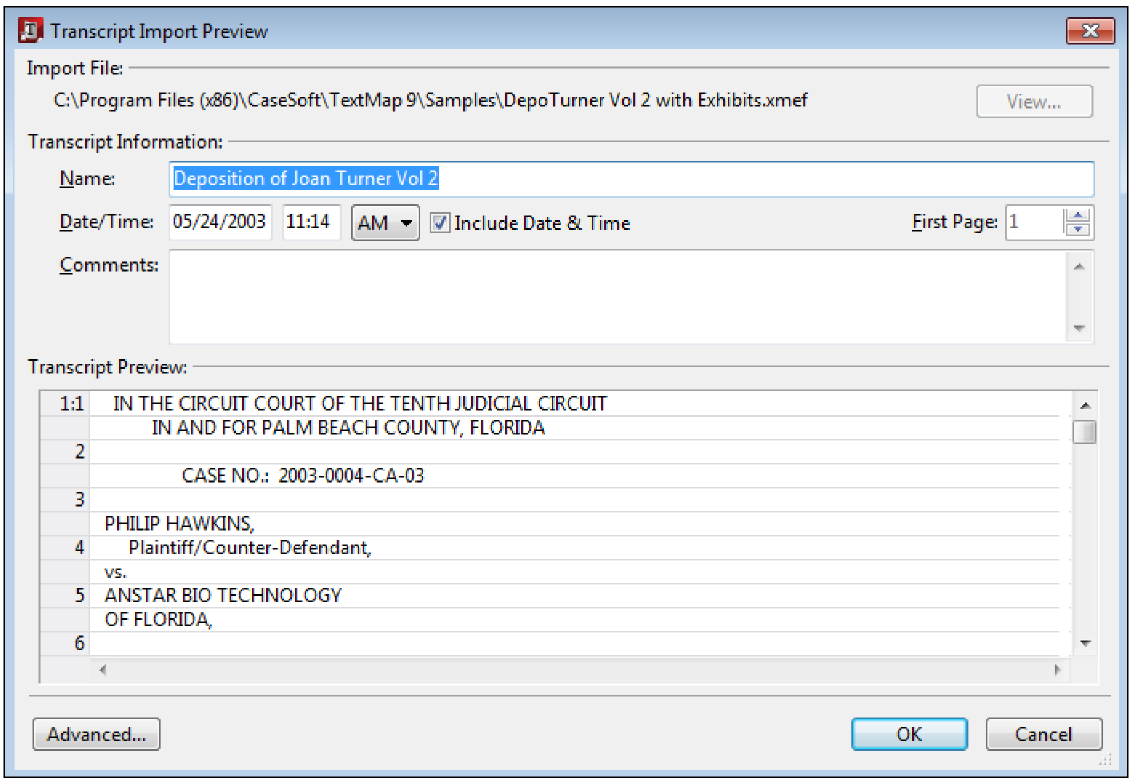
To import exhibit packages with linked exhibits

1. On the **Home** ribbon, click **Import Transcript**.

   You can also click Import on the File menu, and then click Import Transcripts.

2. In the **Select one or more Transcripts to Import** dialog box, select the exhibits package that you want to import, and then click **Select**.

3. In the **Transcript Import Preview** dialog box, review the transcript information and type in any comments you want to track regarding the imported files.

   TextMap searches the transcript and uses the first date it locates to automatically fill in the Date field. You can modify this date, if necessary.

4. Click the **Advanced** button if you want to modify page numbering or review transcript format details.

5. Click **OK** to continue.

   When the import process is complete, the imported transcript displays in the Transcripts pane and the exhibit files are copied into the case exhibits folder.

4. In the **Navigation** pane, click the **Exhibits and Video** button to display linked exhibits and other documents included in the exhibit package.

Related Topics

[About exhibits](#)
[Using TextMap Exhibit Linker](#)
[Changing exhibit file paths](#)

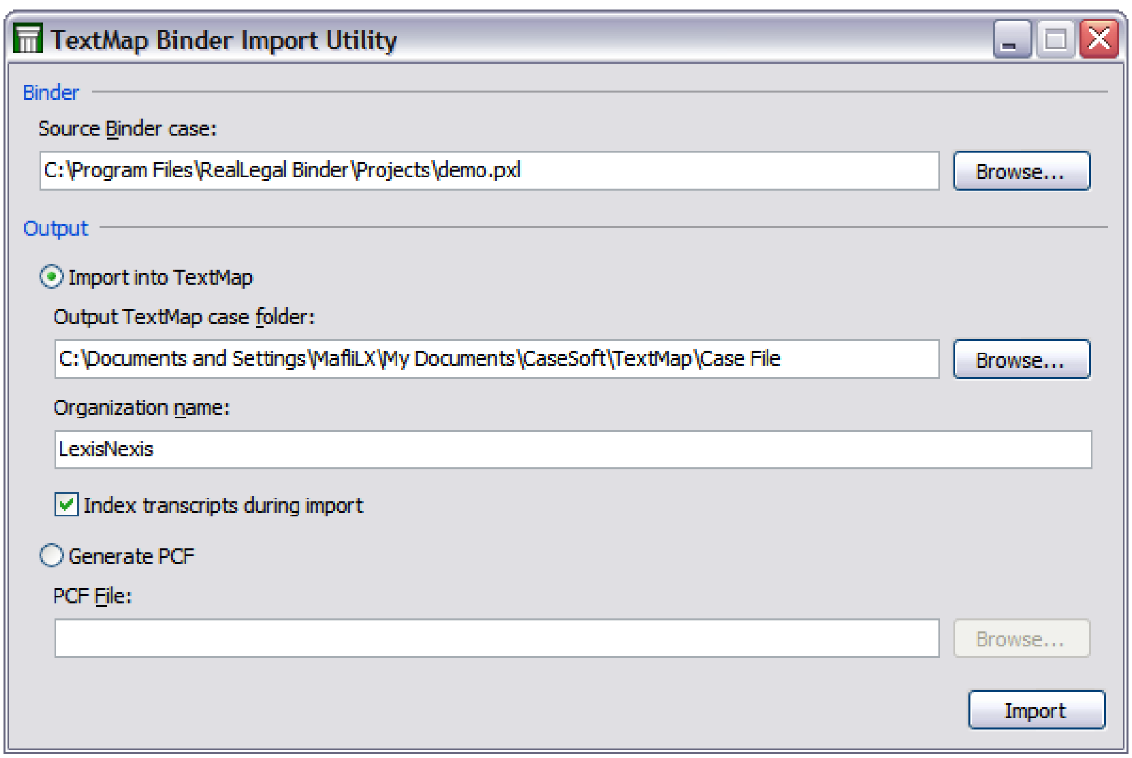
Importing binders

Using the TextMap Binder Import Utility, you can convert and import a binder case from RealLegal Binder directly into your TextMap case file along with any case exhibits (including linked exhibits) or synched video files. The utility supports importing one binder case at a time.

Once you have imported the binder case into TextMap, you can create a case file from it.

To import a binder case

1. Double-click on the **TextMap Binder Import Utility** icon to display the **TextMap Binder Import Utility** dialog box.



2. Next to the **Source Binder case** field, click **Browse** to navigate to the network folder where the binder file (.pxl) you want to import is stored.

3. In the **Select a Binder case** dialog box, click on the binder file you want to import, then

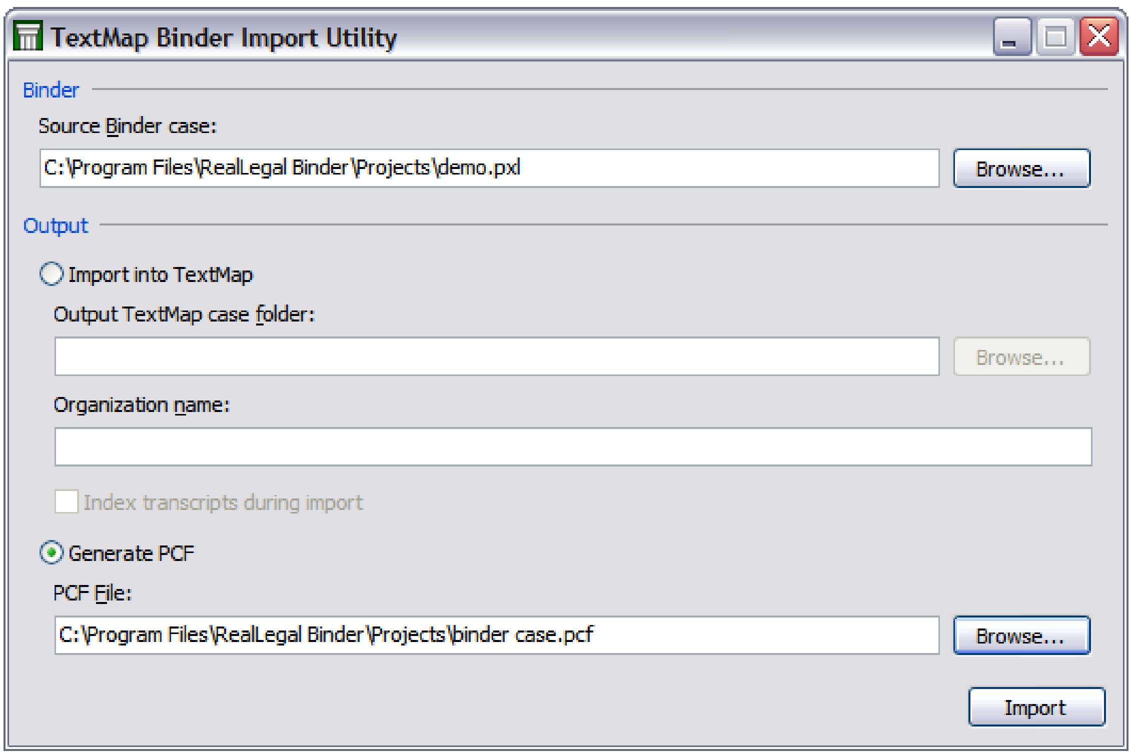
click **Open**.

4. Next to the **Output TextMap case folder** field, click **Browse** to locate the network folder where you want to save the case file (.txmap).
5. In the **Browse For Folder** dialog box, locate the network folder you want to use, then click **OK**.
6. In the **Organization name** field, type in the name of your organization.
7. Select the **Index transcripts during import** check box if you want this option.
8. Click the **Import** button to import the file into your TextMap case.
9. In the message box verifying the import is complete, click **OK**.

   The imported case now displays in TextMap.

To generate a .pcf file

1. Double-click on the **TextMap Binder Import Utility** icon to display the **TextMap Binder Import Utility** dialog box.



2. Next to the **Source Binder** case field, click **Browse** to navigate to the network folder where the binder file (.pxl) you want to import is stored.
3. In the **Select a Binder case** dialog box, click on the binder file you want to import, then click **Open**.
4. In the **Output** area, click **Generate PCF**.

5. Next to the **PCF File** field, click the **Browse** button to navigate to the network folder where you want to save the converted binder case file (.pcf).
6. In the **File name** field, type in the name of the filed, then click **Save**.
7. Click the **Import** button to convert the binder case to the .pcf file format.
8. In the message box verifying the import is complete, click **OK**.

   You can now import the .pcf into TextMap and create a new case with it.

Related Topics

Installing the TextMap Binder Import Utility

Importing files from a Clipboard

Importing transcripts using a Clipboard is not used as often to import files as the Import File(s) method. However, this feature allows you to import content from many software programs such as Microsoft® Word or Outlook, or any text file. It's a great way to add complaints, research copies from the Internet, or even interview notes.

First you must open the electronic file in its original program and copy the contents onto an electronic Clipboard. Then, you import the contents into your TextMap case. When importing content, TextMap limits text to 25 lines per page, which is a common transcript format, but may not match the formatting of the original document. If you send a fact from this type of text file to CaseMap, the page/line reference will not the that of the original document.

> If you try to save a PDF to a text file using the Save as Text command, the formatting of the original will not match the formatting of the original text file. The discrepancy in content will be detrimental in any situation where you are referring to the original file.

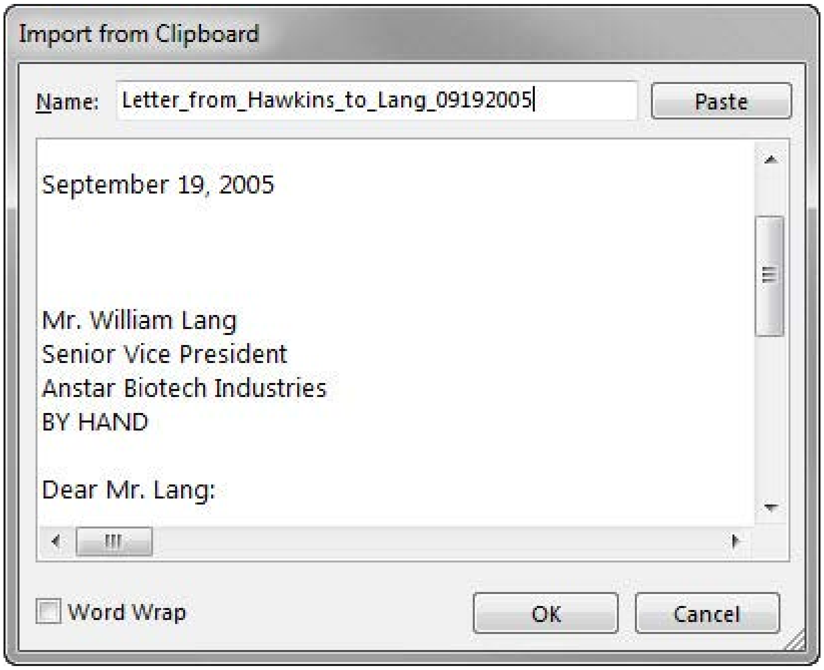
To import files from a Clipboard

1. Open the electronic file in its native software program, such as Microsoft Word.
2. Press **CTRL+A** to select all text within the document.
3. Press **CTRL+C** to copy the selected text to the Clipboard.
4. Close the file and the software program.
5. In **TextMap**, on the **Home** ribbon, click **More Import,** and the click **Import from Clipboard**.

   You can also click Import on the File menu, and then click Import from Clipboard.
6. click **More Import** on the **Home** ribbon, and then click **Import from Clipboard**.

The Import from Clipboard dialog box opens.

7. In the **Name** box, type in a name for the file, then click **OK**.



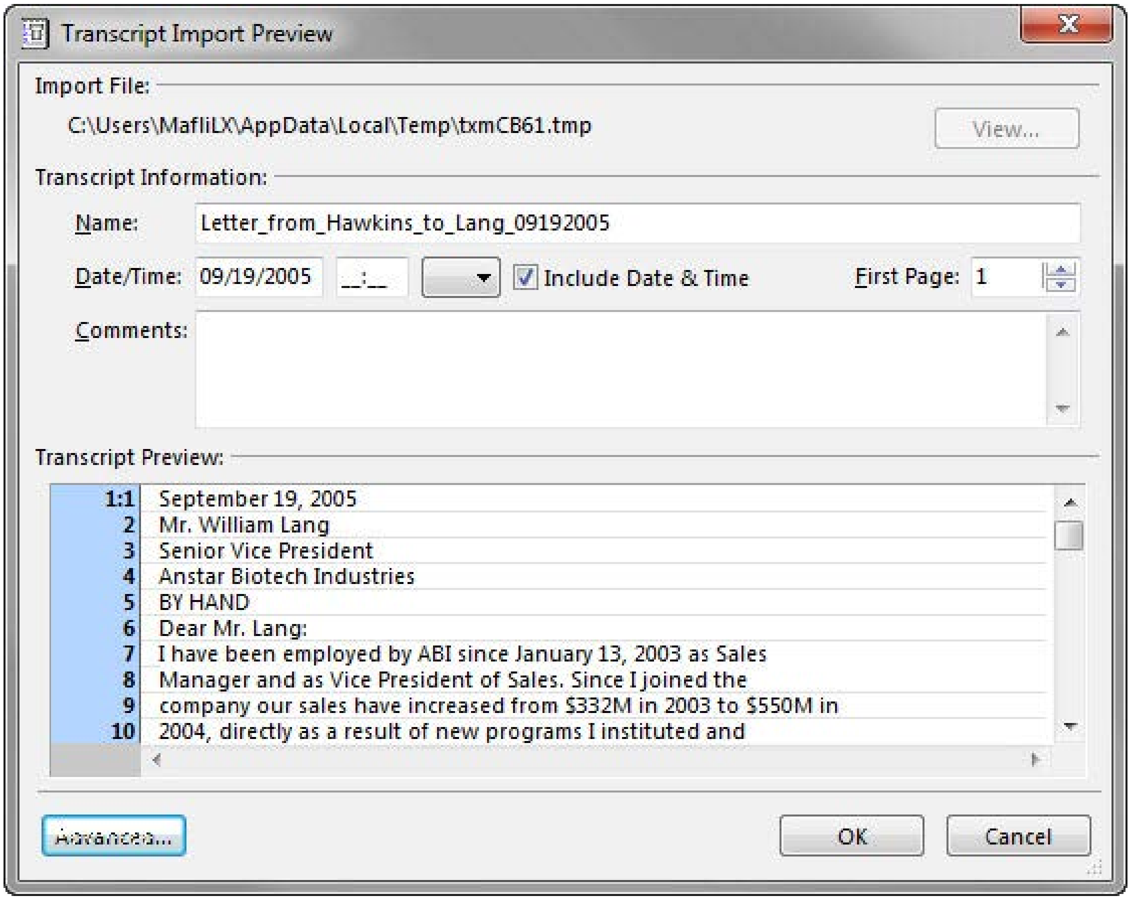
8. Select the **Word Wrap** check box if you want the text to wrap within the dialog box.

9. In the message about file format, click **OK**.

   The Transcript Import Preview dialog box opens.

   The Name box in this dialog box is filled with the contents of the Name box on the Import from Clipboard dialog box. The Date/Time field is also automatically filled in.

10. In the first **Date/Time** box, notice that the date is automatically filled in for you.



11. In the second **Date/Time** box, type in the time, then select **AM** or **PM** from the list if that information is applicable.

    Notice that the Include Date & Time box is selected by default. Clear this check box if you do not want the date/time to display in the Transcripts pane along with the transcript name.

12. In the **Comments** box, type in any relevant information about the file content.

13. In the **Transcript Preview** box, scroll to verify that the file content displays properly.

14. Click **OK** when you are finished.

15. In the **Transcripts pane**, verify that the letter now displays with case transcripts.

    The file's content displays in the Transcript window and displays by line and page number like transcripts do.

Related Topics

[About importing data]()
[Importing transcripts]()

Updating or appending transcripts

You have the option of either updating or appending an existing transcript. The steps for performing either option are nearly identical:

- If you update an existing transcript, TextMap updates the existing transcript and creates a backup of the original transcript with a draft that is appended to the original transcript name.
- If you append an existing transcript, TextMap appends the existing transcript and creates a backup of the original transcript renamed with "[Draft]" appended to the name. The original draft transcript will retain the original transcript ID.

The backup and the updated/appended copy will both display in the Transcripts pane. You can later delete the backup draft by selecting it in the Transcript pane and then clicking Delete Transcript on the Transcript menu.

To learn about updating rough transcripts

If a rough copy of a transcript was already imported into the case, you can easily update it with the final transcript. TextMap creates a backup copy of the transcript when updating it. The name of the transcript will be the same, but with [DRAFT] appended.

Any annotations applied to the rough copy will be transferred to the final transcript. If TextMap cannot locate the exact transcript location for an annotation, it will label it as an orphaned annotation. Orphans occur when the annotation text or the text surrounding the annotation has changed significantly. This change can be actual, textual change or a large change in formatting. TextMap moves orphaned annotations to the top of the transcript (Page 1, Line 1). The note section includes the original page and line number of the annotation to help you place the annotation manually. Move annotations by using the Move Annotation option on the Annotation menu.

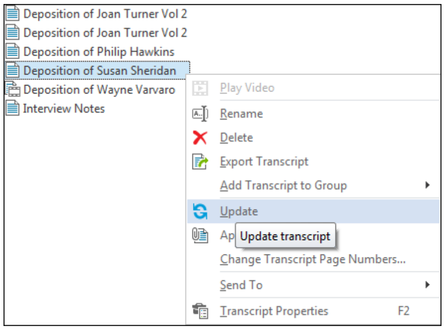
Any redactions applied to the rough copy will be transferred to the final transcript. TextMap cannot apply redactions to the final transcript if there are spelling errors, or if there is information removed from the transcript text.

In the event that you have multiple rough transcript files that are all part of the same transcript, TextMap also offers the option to combine these files into a single transcript by appending the later testimony to an existing transcript. In this instance, choose the Append to Transcript option from the right-click menu.

> If you are updating/appending a transcript that is assigned to one or more transcript groups, the updated and DRAFT transcripts will both display within the transcript group(s). If the rough transcript is assigned to a group that no longer exists, then the rough and final transcripts will display in the Transcript List under Unassigned. See Creating transcript groups.

To update or append an existing transcript

1. In the **Transcripts** pane, right-click on the transcript you want to append.



2. On the submenu, click one of the following:

   To update a transcript

   a. Click **Update**.

   b. In the **Select Updated Transcript File** dialog box, navigate to and select the updated transcript, and then click **Select**.

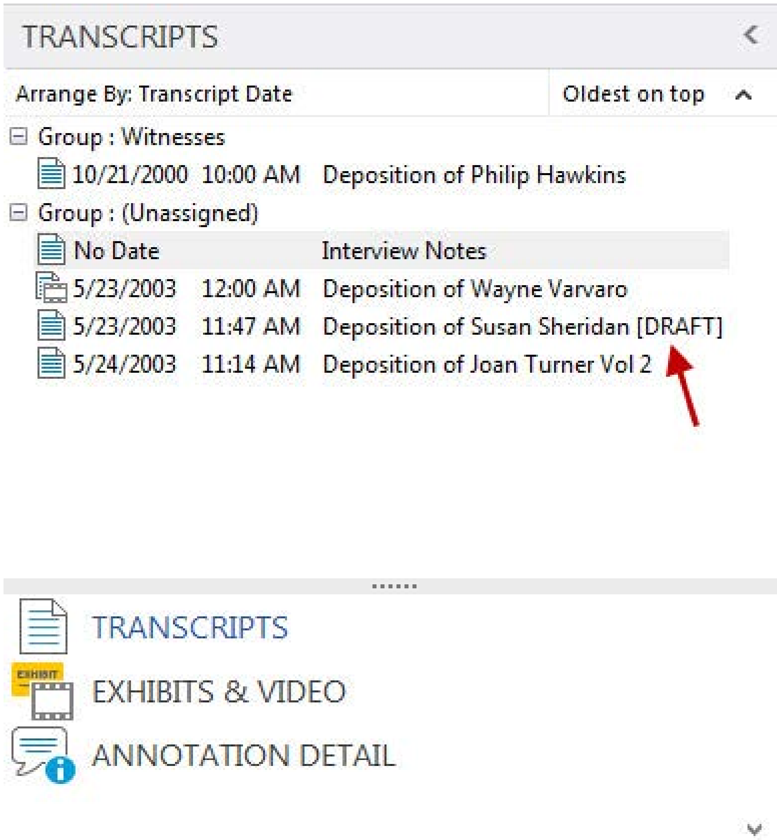
   c. In the message box to continue, click **Yes**.

   d. In the **Transcript Import Preview** box, confirm the name of the transcript, and click **OK** to continue.

   e. In the message box for backups, click **OK**.

   f. Click **OK** on the subsequent message box(es) to complete the transcript update process.

      The updated transcript displays in the Transcript pane, identified by the word [DRAFT] appended at the end of the name.

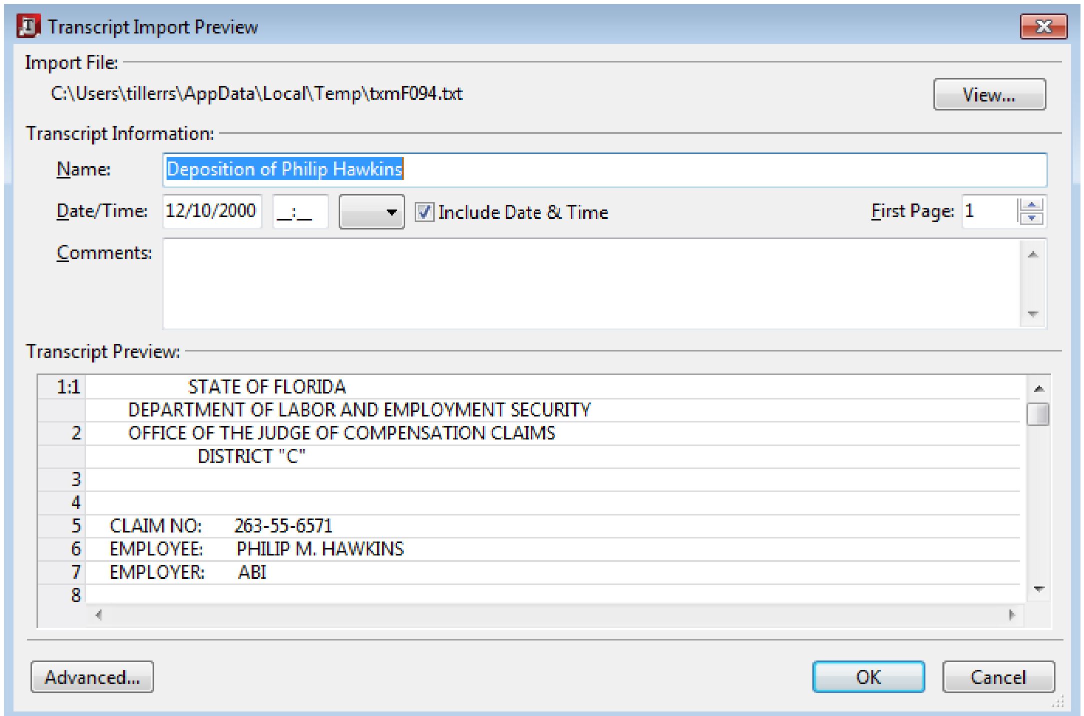


To append to a transcript

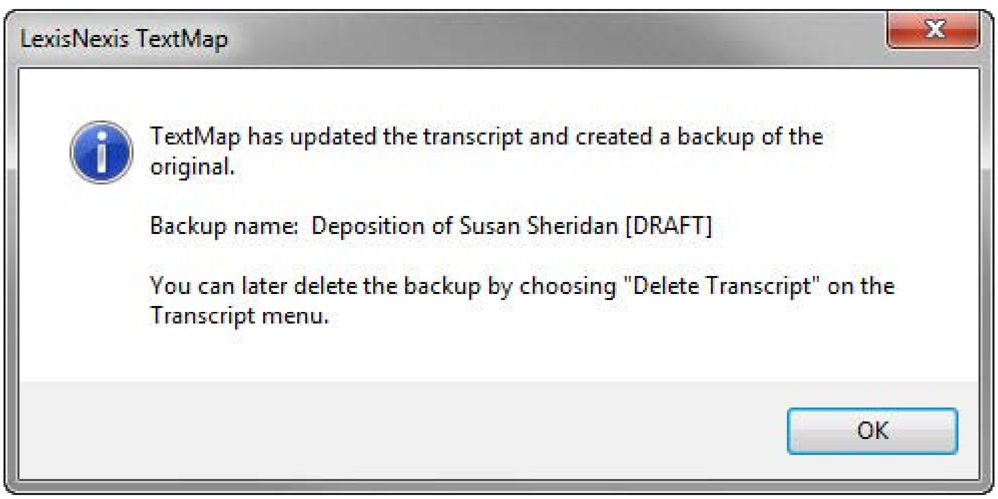
a. Click **Append to**.

b. In **Select Transcript File to Append** dialog box, navigate to and select the updated transcript, and then click **Select**.

c. In the **Transcript Import Preview** dialog box, modify any transcript information if needed, such as the date and time, and then click **OK**.



d. In the transcript message, click **OK**.



The original transcript now displays in the Transcript List with [DRAFT] appended to the name. The updated or appended transcript also displays.

Related Topics

[Importing transcripts](#)
[About CaseViewNet](#)

Batch importing cases

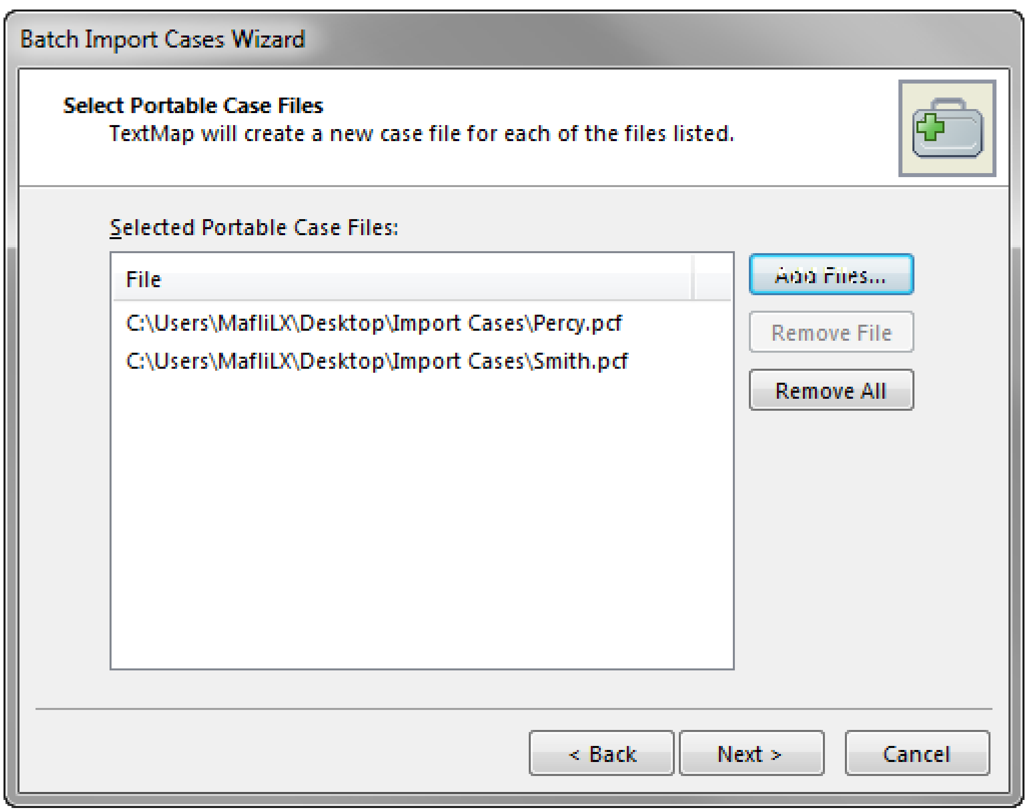
The Batch Import Cases Wizards assists you in importing Portable Case Format (.pcf) files into a TextMap case. TextMap will create a new case for each of the files included. TextMap saves each case to the same folder as the original .pcf file and uses the .pcf file name for each new TextMap case created.

You have the option to skip building the word indices to reduce processing time. You may want to choose this option when importing large cases. TextMap can build the word indices anytime after the cases are created.

To bulk import cases

1. On the **File** menu, click **Batch Import Cases**.
2. In the message box to close the case, click **OK**.

   The Batch Import Cases Wizard launches.
3. On the **Welcome** page, click **Next**.
4. On the **Select Portable Case Files** page, click **Add Files**.



If you want to import more than one file at a time, press the CTRL key while selecting the files you want to import.

5. In the **Select one or more cases to import** dialog box, navigate to the folder where the .pcf file is saved.

6. Select the file you want to import and then click **Open**.

   To remove a file from the import, select it in the Selected Portable Case Files box and click Remove File.

   To remove all files from the import, click Remove All.

7. Click **Next** to continue.

8. In the **Word Index Options** dialog box, choose whether to build a word index for each case, then click **Next**.

   - Yes, I want to build the new word index.
   - No, I do not want to build the word index.

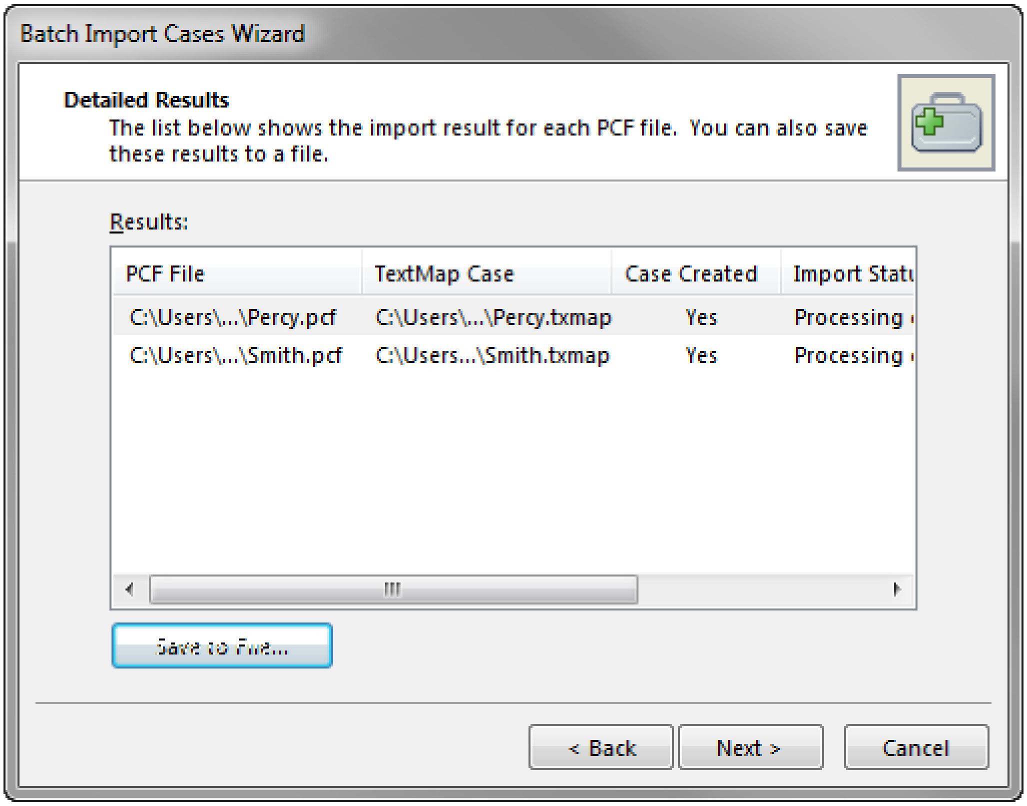
9. In the **Cases to Create** dialog box, review the file location of the case files, then click **Next**.

10. In the **Ready to Create Cases** dialog box, review the number of cases you are bulk importing, then click **Next**.

11. In the **Import Complete** dialog box, review the number of cases successfully imported.

12. Select the **View detailed result** check box to view more details about the import, then click **Next**.

13. In the **Detailed Results** dialog box, scroll to view each case's details.



14. Click the **Save to File** button to save this information to a .csv file.

15. In the **Completing the Batch Import Cases Wizard**, click **Finish**.

    You can now open the cases in TextMap.

Related Topics

[About importing data]
[Importing transcripts]
[Importing exhibit packages]

Using CaseViewNet Realtime

About CaseViewNet

CaseViewNet® is a free transcript viewer made by Stenograph, LLC, and it is automatically installed when you install TextMap.

CaseViewNet provides interactive real-time access to testimony through a court reporter's private WiFi network or a wired connection. CaseViewNet updates all edits during a session.

CaseViewNet and TextMap integrate so that you can instantly import a transcript into TextMap during a deposition and start annotating and issue linking. You can even start CaseViewNet by clicking on TextMap's toolbar. When you're ready to import the transcript to TextMap just click the Send to TextMap button.

CaseViewNet software is free. There are no tokens to purchase, no royalties to pay, and no compliance issues to worry about. You are free to concentrate on the important testimonial matters at hand.

For more information about CaseViewNet, click here. Customer Support for CaseViewNet is provided by Stenograph. For TextMap-related questions, call CaseMap Customer Support.

Learn what you can do with CaseViewNet

CaseViewNet is intuitive and easy to learn. It has its own Help system and customer support through Stenograph.

Here is a list of what you can expect to do using CaseViewNet:

- Mark testimony for quick and easy review.
- Search testimony for a question, answer, word, phrase, marked lines, time or notes.
- Use Quick Find to locate questions, answers, marked lines and notes.
- Write on-screen notes linked to specific testimony.
- Use Quick Issues commands to identify specific testimony for on-screen review.
- Locate time-specific testimony segments.
- Generate printed reports of annotated text for printing and save information to file.
- Save the realtime transcript as a CaseViewNet, LiveNote, ASCII text, Summation text, Amicus text or TextMap portable transcript file.
- Instantly export the transcript to a TextMap case by clicking Send to CaseMap button.

Find a CaseViewNet court reporter

CaseViewNet client viewer accepts serial input from any court reporter capable of sending realtime to viewers such as CaseView® II, LiveNote®, Summation®, and others. It uses the same serial cables, splitters, and adapters traditionally used for realtime court reporting.

Case CATalyst users with a CaseViewNet certificate can distribute realtime to CaseViewNet wirelessly. Client computers will receive the entire transcript, even if they arrive late. CaseViewNet's RapidRefresh™ instantly updates all edits, including globals, on clients' computers so your realtime looks better. This process allows you to eliminate cables, splitters, adapters, and the time it takes to connect them.

Ask the reporters you normally use if they can provide realtime service using CaseViewNet. Reporters who have Stenograph's Case CATalyst reporting software can add CaseViewNet capability as an optional annual license.

You can find court reporters who are licensed to provide CaseViewNet realtime output via network connection allowing for wired/wireless connection and instant refreshing of the transcript. Search the Stenograph licensed CaseViewNet reporter directory.

Get a free download of CaseViewNet

CaseViewNet automatically launches when you click on the Realtime toolbar button. If

TextMap can't find CaseViewNet a message displays with a link to the Stenograph website for information about CaseViewNet and a free download.

Related Topics

Sending a transcript to TextMap
Updating or appending transcripts

Sending a transcript to TextMap

Sending a transcript from CaseViewNet to TextMap is easy. If you are importing a rough transcript using CaseViewNet, you can begin annotating the transcript as soon as the import is complete. Later, you can update the rough or draft transcript with the final transcript. TextMap creates a backup copy of the transcript when updating it. The name of the transcript will be the same, but with [DRAFT] appended to it. Any annotations applied to the rough copy will be transferred to the final transcript. See Updating or appending transcripts.

You can send a transcript two ways:

- On the **File** menu in **CaseViewNet**, click **Send to TextMap**.
- On the **CaseViewNet** toolbar, click the **Send to TextMap** button 

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Related Topics

About CaseViewNet
Updating or appending transcripts

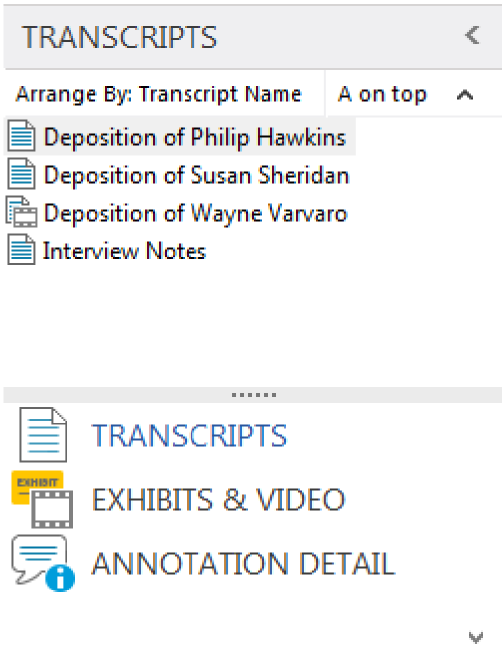
Working with Transcripts

About transcripts

Once transcripts are imported into a case, you can organize, sort, and edit them to prepare for transcript review. When a transcript is imported or added to TextMap, it is displayed alphabetically (by name) in the Transcripts pane and can be sorted accordingly. Transcripts can also be sorted by the transcript or import date/time.

After a transcript has been imported to TextMap:

- it can remain as unassigned or placed in a group with other transcripts for better search capabilities
- a new starting page number can be specified (page numbering can be changed).



If the transcript group(s) do not display in the Transcripts pane, right-click on the Arrange By heading in the Transcripts pane and select Show Groups.

Related Topics

[Resizing the Transcripts pane]
[Changing transcripts fonts]
[Editing transcript properties]
[Sorting transcripts]
[Creating transcript groups]
[Renaming transcripts]
[Deleting transcripts]
[Sending transcripts to Sanction]

Resizing the Transcripts pane

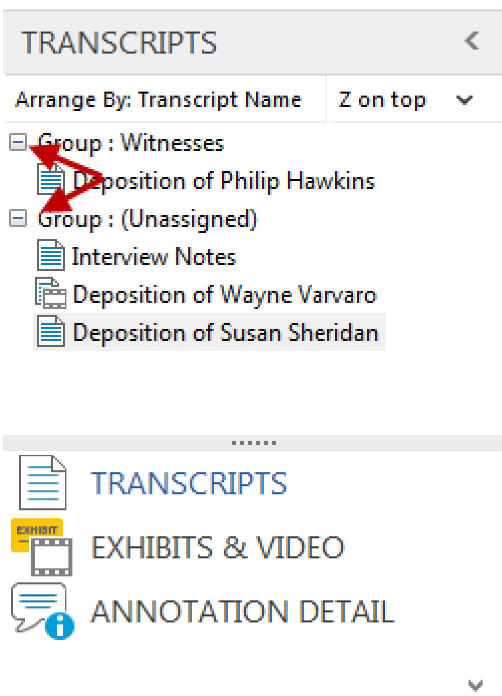
The Transcript pane is located at the top of the Navigation pane when you click on the Transcripts, Exhibits and Video, and Annotation Detail buttons. The Transcript pane contains all transcripts and other documents imported into the TextMap case, and displays a date and time stamp for each. You can easily resize the Transcripts pane for better viewing or hide it from to maximize the TextMap window during transcript review.

You can sort transcripts in alphabetical order by name, and by transcript or import date/time. TextMap saves the sort order last used when you when you reopen the case.

To hide task panes for better viewing

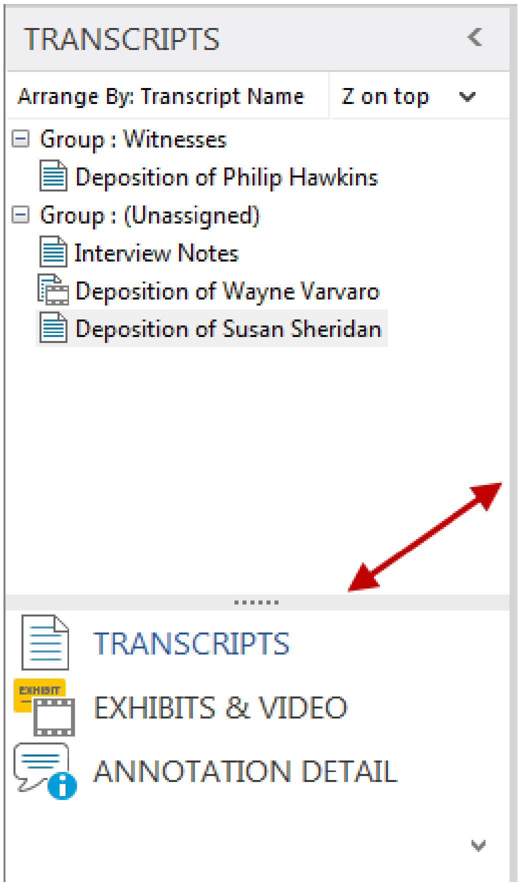
To show/hide the Transcript List, click the Expand (◢)/Collapse (▹) buttons. For example, if you want to focus on searching transcripts in one group (e.g., Group A), you may want to hide transcripts from other groups (e.g., Unassigned) from view. You can also double-click on the group header (e.g., Unassigned) to expand and/or collapse the area.

Expanding and collapsing groups is not supported for Windows® XP users.



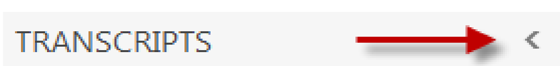
To maximize the Transcript pane for better viewing

To change the height or width of the Transcript pane, drag the split bars to the left or right, or up or down.



To hide the Transcript pane to maximize transcript display

To maximize a transcript's display in the TextMap window, click on the Collapse button to pin the Navigation pane to the left side of TextMap. The Navigation pane can easily be expanded and locked on-screen when you need to use it more frequently.



To hide the date and time display

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click the **Transcripts** tab.
3. In the **Transcripts List Options** area, clear the check boxes for **Show transcript date** and **Show transcript time**.
4. Click **OK** to save your changes.

Related Topics

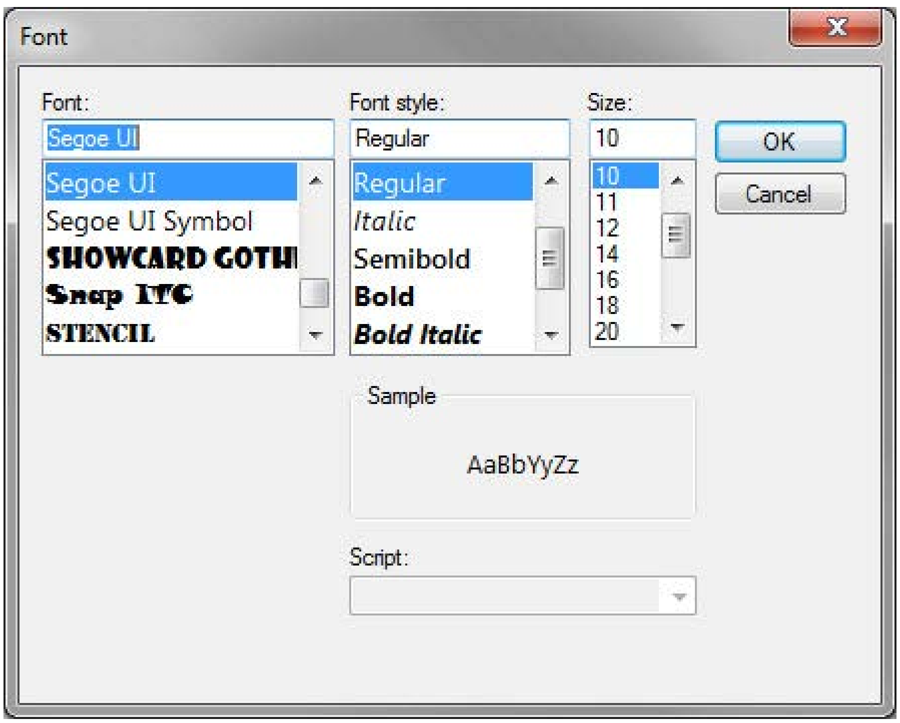
[About transcripts](#)
[Changing transcripts fonts](#)
[Sorting transcripts](#)
[Creating transcript groups](#)

Changing transcripts fonts

Once transcripts are imported, you can adjust the font size and style for better viewing in the TextMap window. The selected font size and style is applied to all case transcripts.

To change transcript fonts

1. On the View ribbon, click the **Transcript Font** to open the Font dialog box.
2. In the **Font** list, click on the font you want to use.



3. In the **Font style** list, click on the font style you want: **Regular**, **Italic**, **Bold**, **Bold Italic**.
4. In the **Size** list, click on the font size.
5. Review your selections in the **Sample** box.
6. In the **Script** list, click on the font script type, if necessary.

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

Related Topics

[About transcripts](#)
[Importing transcripts](#)

Changing transcript page numbers

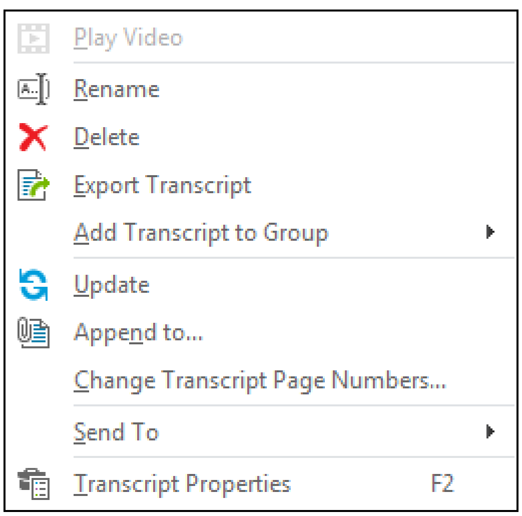
If you receive a transcript for which the page numbering is incorrect and do not correct it during the initial import, you can still update the page numbering after the fact. The Change Transcript Page Numbers feature only changes the page numbers and does not change the transcript text or line numbering on each of the pages.

TextMap automatically updates existing annotations to reflect the new page numbers.

To change a transcript page numbers

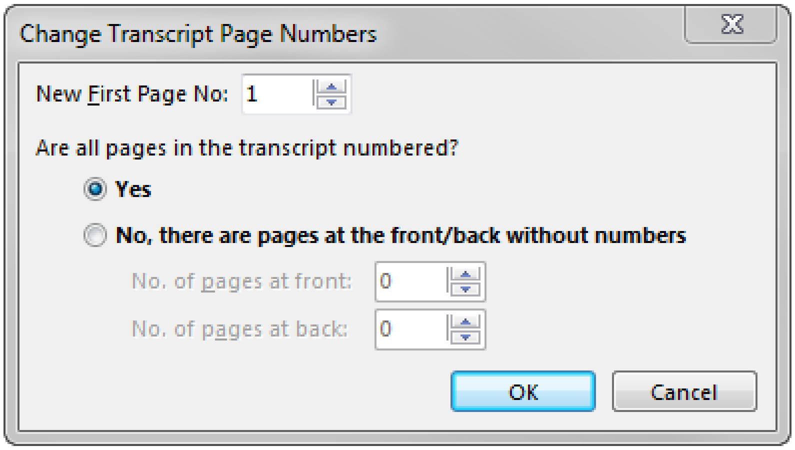
1. On the **Transcripts** list, select the transcript where the page numbering will be changed.

2. Right-click on the selected transcript, and then select **Change Transcript Page Numbers**.



The Change Transcript Page Numbers menu item is disabled if you do not have 'Update Transcript' permission.

3. In the **Change Transcript Page Numbers** dialog box:



To number all pages in the transcript

a. In the **New First Page No:** box, enter a value (e.g., 1) for the first page of the transcript.

b. Under the **Are all pages in the transcript numbered?** heading, select **Yes** to number all pages.

c. Optional: Go to the **To set unnumbered pages** procedure to identify unnumbered pages in the front/back of the transcript, otherwise, proceed to **Step 4**.

To set unnumbered pages

a. Under the **Are all pages in the transcript numbered?** heading, select **No, there are pages at the front/back without numbers** to identify the number of pages in the front and/or back of the transcript.

b. In the **No. of pages at front:** box, enter the number of pages at the front of the transcript that are not numbered.

c. In the **No. of pages at back:** box, enter the number of pages at the back of the transcript that are not numbered.

d. Proceed to **Step 4**.

4. In the **Change Transcript Page Numbers** dialog box, click **OK** to make the page numbering change in the transcript.

Related Topics

About transcripts
Importing transcripts

Sorting transcripts

The Transcripts pane allows you to sort transcripts in alphabetical order, by date and time, and name. TextMap saves the sort order last used when you re-open the case.

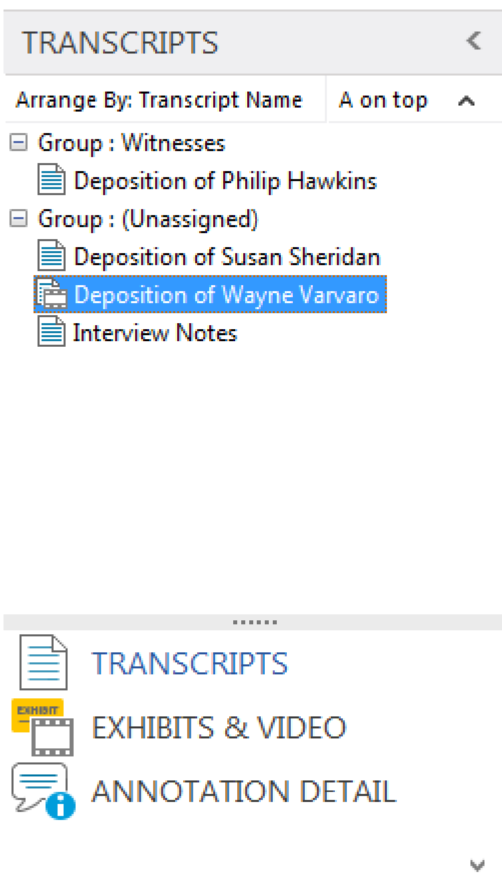
Setting the date/time option is useful when a case contains multiple depositions from the same person. Dates display in brackets to the left of the transcript name in the Transcripts pane. The date and time options are set in the Options dialog box, accessible from the Tools menu. Options are personal to each user's view, and do not affect other users in the same case. If a user changes the date of a transcript, the updated date immediately displays in the list.

When changing from a name sort to a date sort, and vice versa, the Transcripts pane automatically sorts in ascending order from A to Z.

To sort transcripts in alphabetical order

1. In the **Transcripts** pane, click on the **A on top** button to sort transcripts alphabetically in descending order from A to Z.

   You can also click on the View ribbon, and then on the Arrange By tab, click Transcript Name.

2. Click on the button again to resort transcripts in ascending order from A to Z.

3. On the shortcut menu, click **Transcript Name**.

To sort transcripts by date and time

1. On the **File** menu, click **Options**.

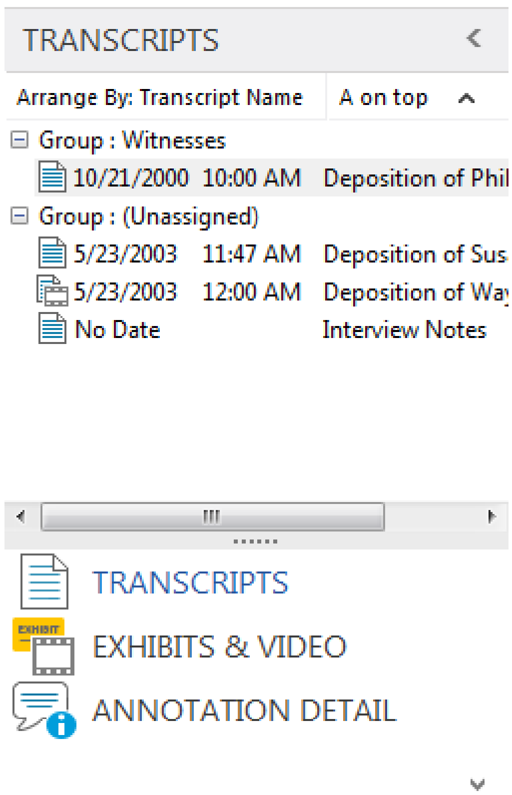
2. In the **Options** dialog box, click the **Transcripts** tab.

3. Select the check boxes for **Show transcript date** or **Show transcript time**.

   You cannot select the Show transcript time check box without also selecting the Show Transcript date check box.

4. Click **OK** to close the **Options** dialog box.

5. In the **Transcripts** pane, notice that the date and/or time for each transcript now displays.

   Transcripts or interview notes without a date sort to the bottom and display No Date in the Arrange By: column.

   Transcripts will sort by date even if you choose not to display the date and time in the Transcripts pane.

6. Right-click on the **Arrange By:** column header and click **Transcript Date** or **Import Date**.

   Transcripts sorted by date can then be sorted from oldest to newest.

7. You can also click the **Oldest on top** button to sort transcripts from oldest to newest by date and/or time.

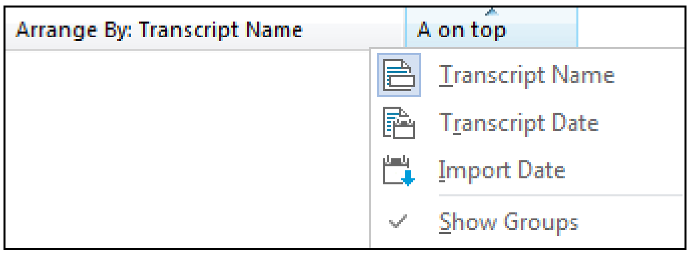
   To resort the list, click the **Newest on top** button.

   To remove the date and time from the Transcripts pane, click Options on the Tools menu and clear the check boxes for showing the transcript date or time on the Transcript tab.

To sort transcripts by group

1. In the **Transcripts** pane, click the **Arrange By:** column header to choose how you want to sort transcripts.

   You can also click on the View ribbon and then select the Show Groups check box.



2. On the shortcut menu, click **Show Groups**.

Related Topics

About transcripts
Importing transcripts
Creating transcript groups

Filtering transcripts

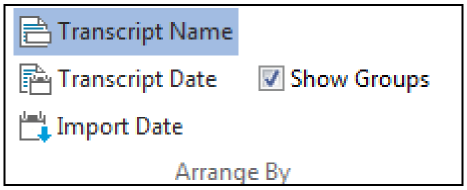
Filtering transcripts allows you to quickly locate a transcript and load it for display.

A minimum of 30 transcripts must be imported into the case before the Filter Transcripts by Name box displays in the Transcripts pane.

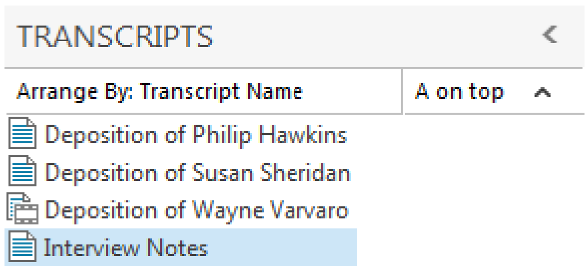
TextMap will automatically save any transcript filter you have. If you close a case, TextMap will display transcripts with the last filter applied.

To filter transcripts by name

1. On the **Arrange By** menu of the **View** ribbon, click **Transcript Name** to sort accordingly all Transcript by name.



The Transcripts pane now displays the transcripts sorted based on the filter.



The transcript now displays in the Transcript window, and any annotations now display in the Annotations pane.

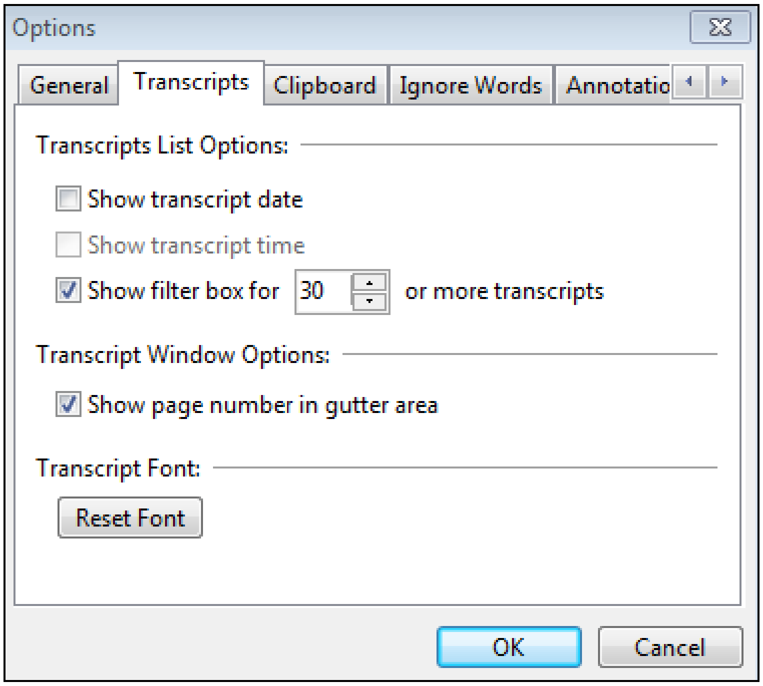
To clear the transcript filter

You can clear the transcript filter four ways:

- Click the Clear button  next to the Filter Transcripts by Name box.
- Select text in the Filter Transcript by Name box and then press the Delete key.
- On the View menu, click Show All Transcripts.
- Press the Esc key.

To modify or disable the transcript filter setting

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click on the **Transcripts** tab.



3. In the **Transcripts List Options** area, click the up/down arrows in the number list to set it to the minimum number of transcripts you want in a case before the Filter Transcripts by Name box displays.

   The default setting is for the filter box to display after 30 transcripts are imported into a case. You can adjust this setting by depending on the number of case transcripts in your case.

4. Clear the **Show filter box for 30 or more transcripts** if you want to disable the Filter Transcripts by Name box from displaying in the Transcripts pane.

5. Click **OK** to save your settings.

Related Topics

[About filtering](#)
[Sorting transcripts](#)

Updating or appending transcripts

You have the option of either updating or appending an existing transcript. The steps for performing either option are nearly identical:

- If you update an existing transcript, TextMap updates the existing transcript and creates a backup of the original transcript with a draft that is appended to the original transcript name.

- If you append an existing transcript, TextMap appends the existing transcript and creates a backup of the original transcript renamed with "[Draft]" appended to the name. The original draft transcript will retain the original transcript ID.

The backup and the updated/appended copy will both display in the Transcripts pane. You can later delete the backup draft by selecting it in the Transcript pane and then clicking Delete Transcript on the Transcript menu.

To learn about updating rough transcripts

If a rough copy of a transcript was already imported into the case, you can easily update it with the final transcript. TextMap creates a backup copy of the transcript when updating it. The name of the transcript will be the same, but with [DRAFT] appended.

Any annotations applied to the rough copy will be transferred to the final transcript. If TextMap cannot locate the exact transcript location for an annotation, it will label it as an orphaned annotation. Orphans occur when the annotation text or the text surrounding the annotation has changed significantly. This change can be actual, textual change or a large change in formatting. TextMap moves orphaned annotations to the top of the transcript (Page 1, Line 1). The note section includes the original page and line number of the annotation to help you place the annotation manually. Move annotations by using the Move Annotation option on the Annotation menu.

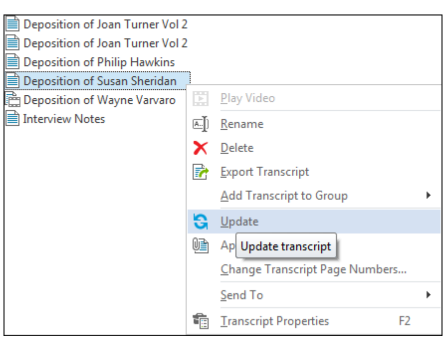
Any redactions applied to the rough copy will be transferred to the final transcript. TextMap cannot apply redactions to the final transcript if there are spelling errors, or if there is information removed from the transcript text.

In the event that you have multiple rough transcript files that are all part of the same transcript, TextMap also offers the option to combine these files into a single transcript by appending the later testimony to an existing transcript. In this instance, choose the Append to Transcript option from the right-click menu.

> If you are updating/appending a transcript that is assigned to one or more transcript groups, the updated and DRAFT transcripts will both display within the transcript group(s). If the rough transcript is assigned to a group that no longer exists, then the rough and final transcripts will display in the Transcript List under Unassigned. See Creating transcript groups.

To update or append an existing transcript

1. In the **Transcripts** pane, right-click on the transcript you want to append.



2. On the submenu, click one of the following:

To update a transcript

a. Click **Update**.

b. In the **Select Updated Transcript File** dialog box, navigate to and select the updated transcript, and then click **Select**.

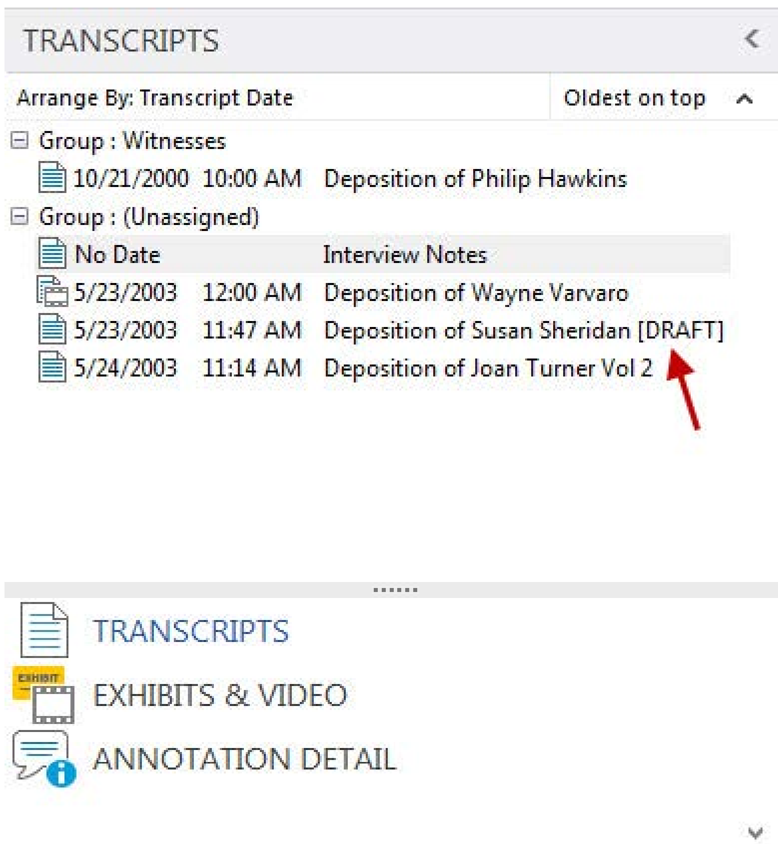
c. In the message box to continue, click **Yes**.

d. In the **Transcript Import Preview** box, confirm the name of the transcript, and click **OK** to continue.

e. In the message box for backups, click **OK**.

f. Click **OK** on the subsequent message box(es) to complete the transcript update process.

The updated transcript displays in the Transcript pane, identified by the word [DRAFT] appended at the end of the name.

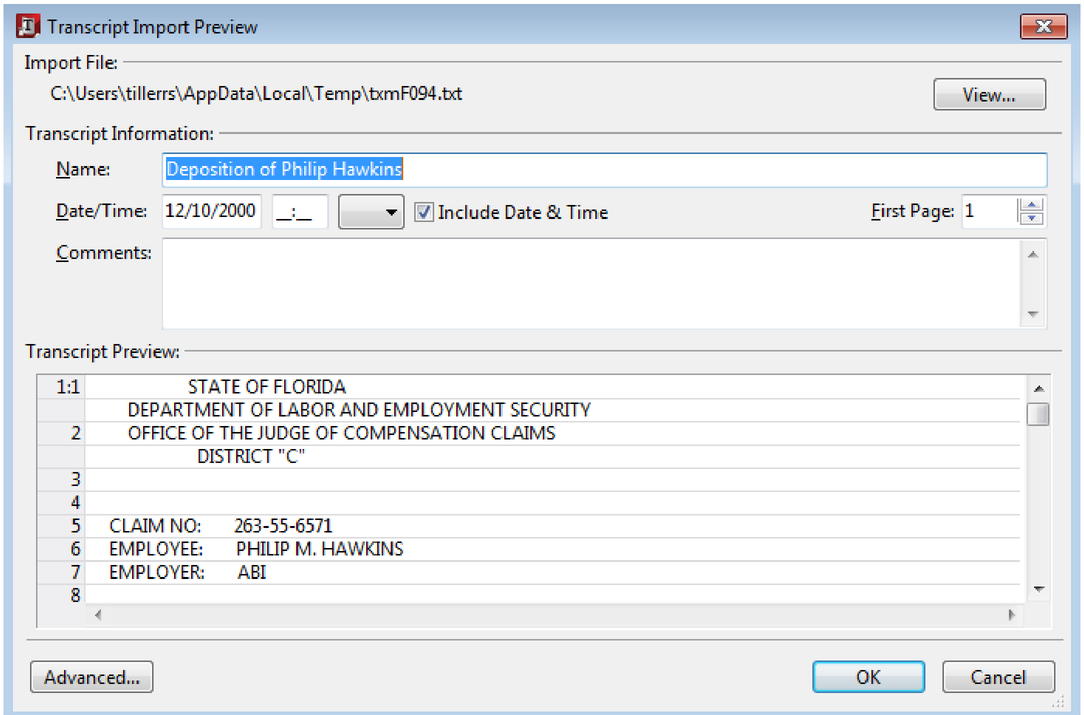


To append to a transcript

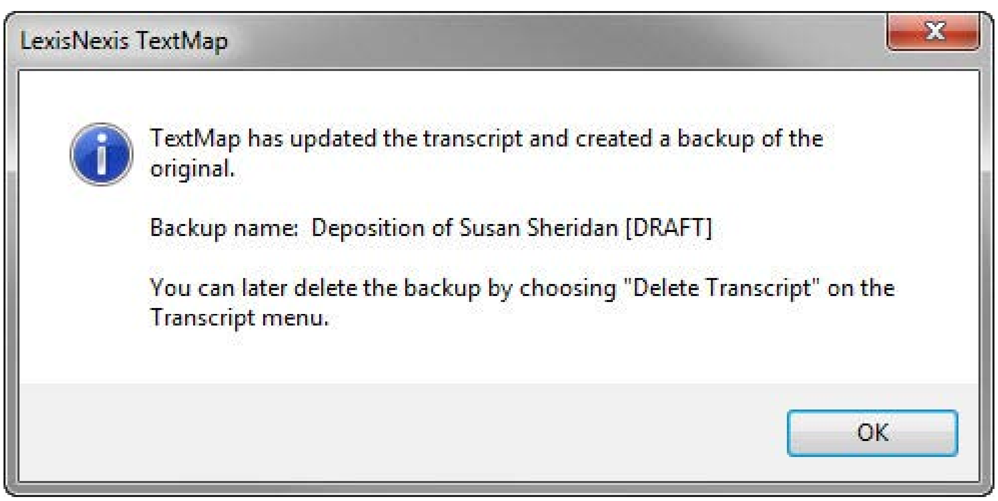
a. Click **Append to**.

b. In **Select Transcript File to Append** dialog box, navigate to and select the updated transcript, and then click **Select**.

c. In the **Transcript Import Preview** dialog box, modify any transcript information if needed, such as the date and time, and then click **OK**.



d. In the transcript message, click **OK**.



The original transcript now displays in the Transcript List with [DRAFT] appended to the name. The updated or appended transcript also displays.

Related Topics

Importing transcripts
About CaseViewNet

Creating transcript groups

TextMap can hold hundreds or even thousands of transcripts, depending on the size of your case. TextMap allows you to create transcript groups for sets of transcripts that may be similar in content. Transcript groups make searching easier and enable focused searching.

Each transcript group must have a unique name to identify it. Transcript group names are not case sensitive and can be up to 255 characters with no leading or trailing punctuation. Each transcript group must include at least one transcript.

Once created, you can edit, rename, and/or delete transcripts groups. Although a transcript group can be deleted, the transcript(s) is/are not removed from the case, but instead, no longer grouped. TextMap only supports deleting one transcript group at a time.

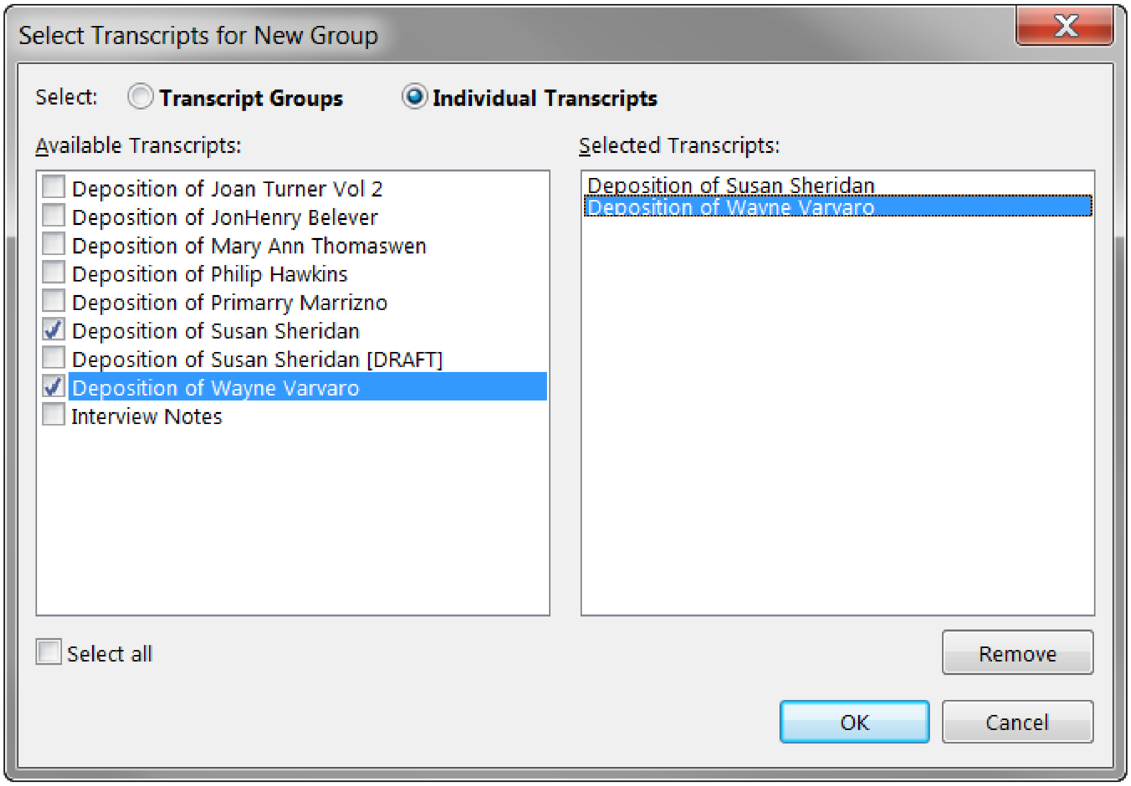
When searches are performed, you can select either transcript groups or specific transcripts to filter (narrow your search), but not both for a single search.

To display groups in the Transcripts pane, click on the Arrange By header and click Show Groups. See Sorting transcripts.

You can also create transcript groups for reporting if you find yourself repeatedly running the same reports on the same set of transcripts. When you create a transcript group simply name that group with a heading that reflects the report you are printing.

To create a transcript group

1. On the **Transcripts** ribbon, click **Create & Edit Transcript Groups**.
2. In the **Transcripts Groups** dialog box, click the **New** button.
3. In the **Select Transcripts for New Group** dialog box, select the transcripts in the **Available** box that you want to add to a group.



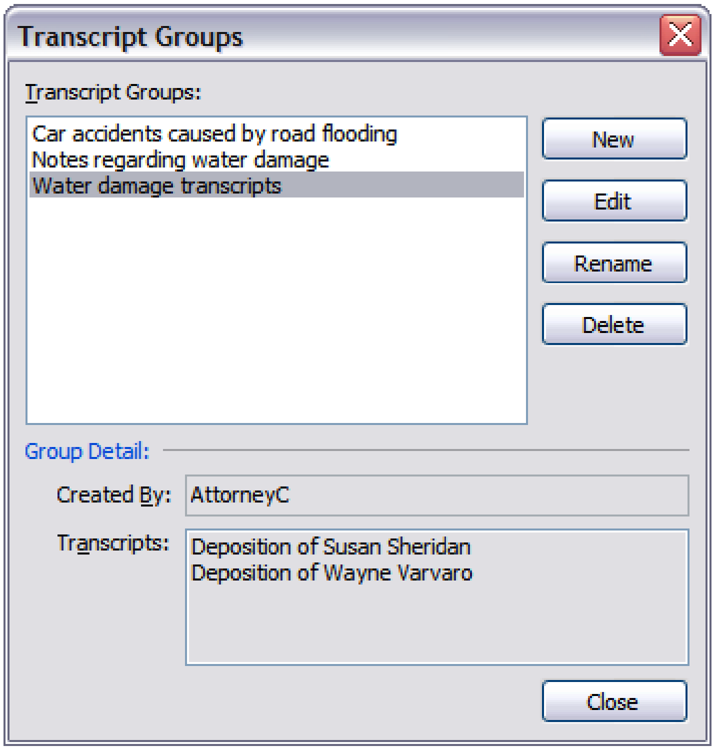
Transcripts display in alphabetical order.

4. Click **Item** or **All** to move the selected transcripts into the **Selected** box.

5. Click **OK** to continue.

6. In the **New Transcript Group Name** dialog box, type in a meaningful name for the transcript group, then click **OK**.

   The new group now displays in the Transcripts Groups box.



The Group Detail area displays the name of the person who created the group and the included transcripts.

7. Click **Close** when you are finished.

To edit a transcript group

1. On the **Transcripts** menu, click **Transcript Groups**.
2. In the **Transcripts Groups** dialog box, select the transcript group you want to edit, then click the **Edit** button.
3. In the **Select Transcripts** dialog box, select the transcripts you want to edit.
   - Select transcripts in the Selected box that you want to remove from the transcript group.
   - Select transcripts in the Available box that you want to add to the transcript group.

   Click the Item or All buttons to move transcripts between the two boxes.
4. Click **OK** to save your changes.
5. Click **Close** when you are finished.

To add a transcript to a group

If you want to add a transcript to a group directly from the Transcript pane (e.g., Unassigned area):

1. Select/highlight a transcript on the **Transcript** pane.

2. Perform one of the following:

   - On the **Transcript** menu, click **Add Transcript to Group**, and then select the group from the submenu list that the transcript will be added to.

   - Right-click on a transcript in the **Transcript** pane, click **Add Transcript to Group**, and then select the group from the submenu list that the transcript will be added to.

There will be no system response if you attempt to add a transcript to a group where it already exists.

The transcript now displays in the new group.

To rename a transcript group

1. On the **Transcripts** menu, click **Transcript Groups**.
2. In the **Transcripts Groups** dialog box, select the transcript to be renamed and click **Rename**.
3. In the **Rename Transcript Group** dialog box, type in the new name, then click **OK**.
4. Click **Close** when you are finished.

To delete a transcript group

1. On the **Transcripts** menu, click **Transcript Groups**.
2. In the **Transcripts Groups** dialog box, select the transcript group you want to delete, then click **Delete**.
3. In the message box to confirm the action, click **Yes**.

   The transcript group is now deleted from the case.

4. Click **Close** when you are finished.

Related Topics

About transcripts
Importing transcripts
Sorting transcripts
About full-text searching

Linking exhibits to transcripts

The Auto Link Exhibit Wizard is used once you have already imported a transcript into TextMap. With this wizard, you can add multiple files, web addresses, or link to another document management system anywhere in the transcript where the exhibit is mentioned. You can bulk link exhibit files on your computer and web addresses, as well as add custom links to other document management programs. You can even make a document in CaseMap a hyperlinked exhibit in TextMap.

To link exhibits or any other files to a single passage in the transcript, use the New Hyperlink Wizard. See Creating single hyperlinks in transcripts.

To link a new exhibit to this case

1. In the **Navigation** pane, click the **Exhibits and Video** button.
2. In the **Exhibit Tasks** pane, click **Link exhibits to this transcript** to open the Auto Link Exhibit Wizard.
3. On the **Auto Link Exhibit Wizard's Welcome** page, click **Next**.
4. On the **New or Existing Exhibit** page, select the option, **Yes, I want to link a new exhibit to this case**, and then click **Next.**
5. On the Document Type page, select the type of document you want to link, and then click **Next**:

To add Files:

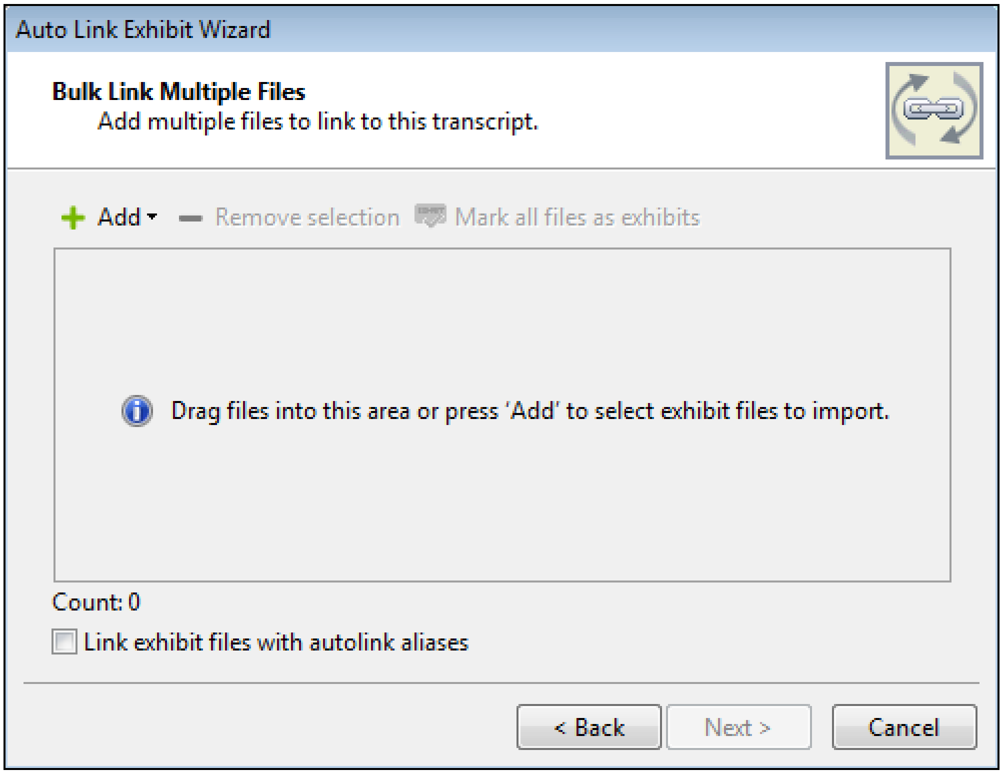
To add Files, do the following:

1. On the **Bulk Link Multiple Files** page, click the **Add** drop down arrow and then click **Add Files**.
2. Navigate to the folder location where the files are saved.
3. In the **Select One or More Exhibits** dialog box, select the file(s), and then click **Open**.

To Add URLs, do the following:

1. On the **Bulk Link Multiple Files** page, click the **Add** arrow and then click **Add URLs**.
2. Enter the address of the web page for the new exhibit and then click **OK**.

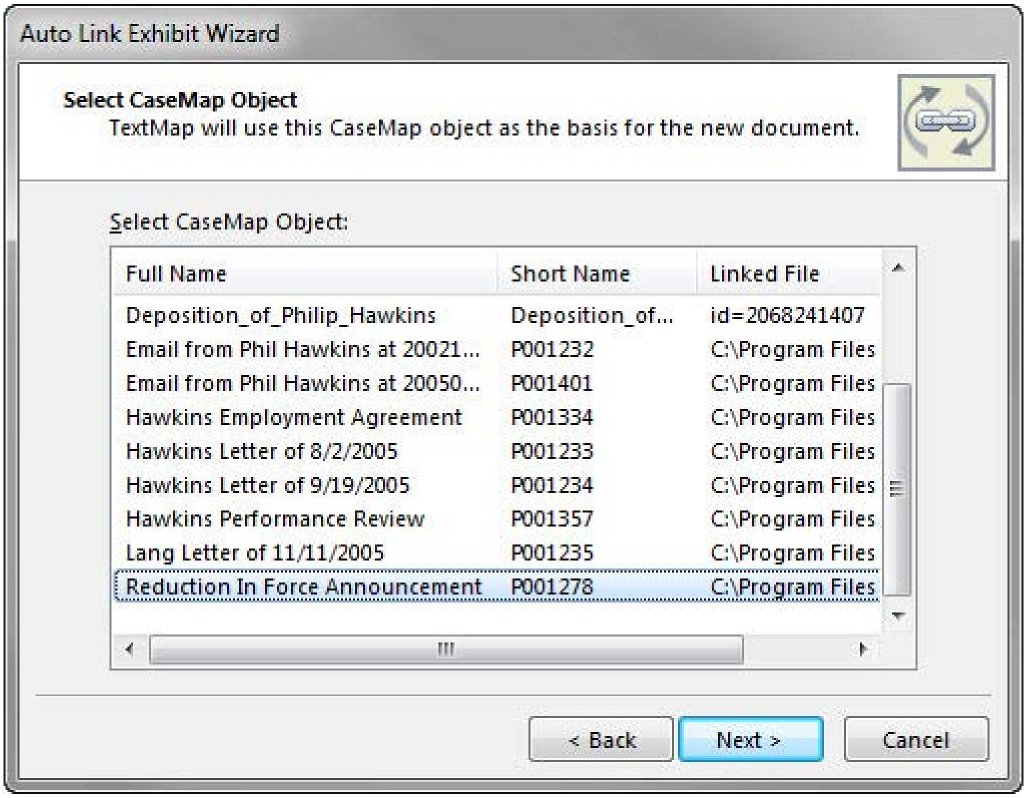
To add files via the drag-and-drop operation, drag your selected files into the specified area on the **Bulk Link Multiple Files** page.



To add a document linked in CaseMap:

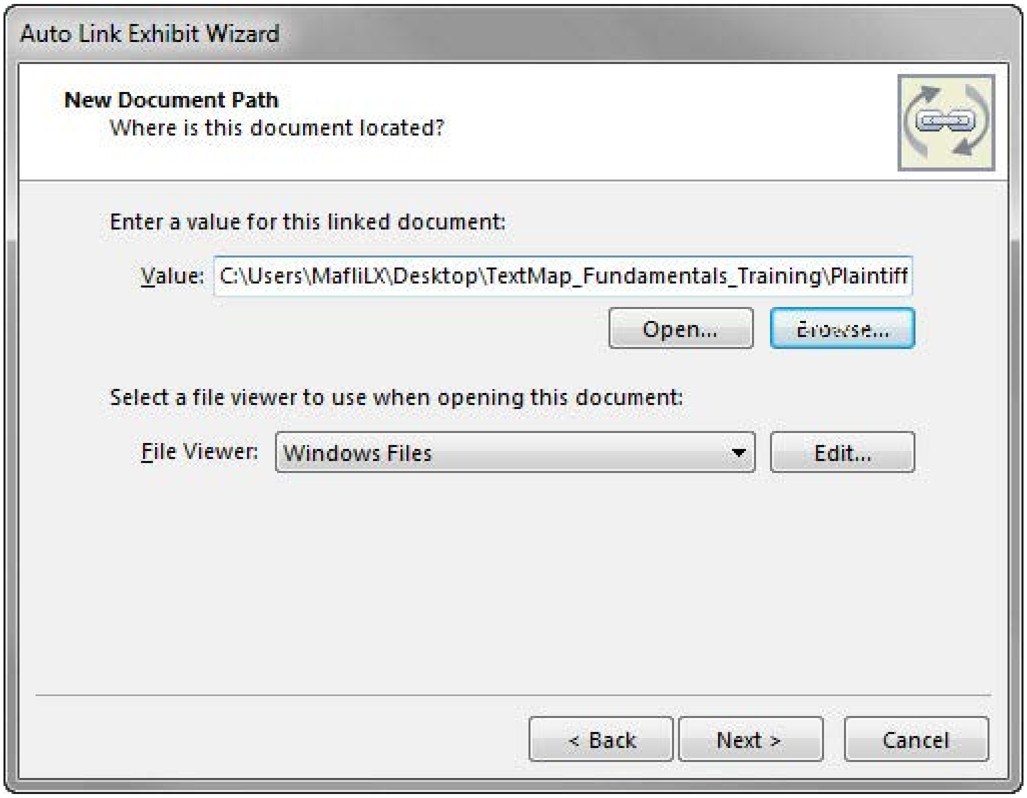
1. On the **Connect to CaseMap** page, launch CaseMap and open the corresponding case (if you have not already done so), and then click **Next**.

2. On the **Select CaseMap Object** page, select the file(s) you want to link, and then click **Next**.



To add a custom link:

1. On the **New Exhibit Path** page, click **Open** or **Browse** to navigate to the folder location where the file is saved, and then click **Open**.



2. In the **File Viewer** list, click the type of viewer you need for the file, and then click **Next**.

3. On the **New Exhibit Name** page, type or edit the file name.

   The contents of the Name box is automatically filled with the file name of the linked file. TextMap searches the transcript for the name and creates a hyperlink to the file at each location.

4. For the question, **Is this document an exhibit?**, click **Yes** or **No**.

   If the document is not an exhibit it will display in the Exhibits pane under Other Linked Documents.

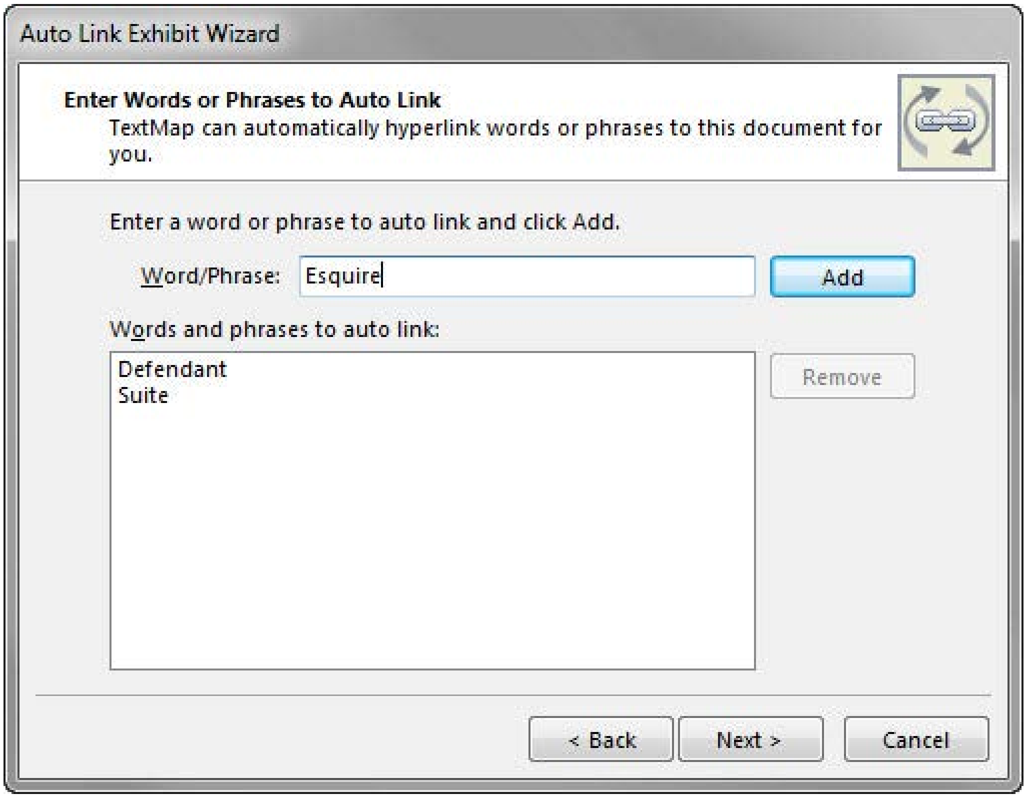
5. On the **Found References to Document** page, review the number of references found in the transcript.

   If there are no references found, on the No References to Document Found page, type in a word or phrase to link to this document, then click **Next**. TextMap automatically creates links in the transcript where all instances of the word or phrase is located in the transcript.

6. Determine whether you want to add more words or phrases and select on one of the following:

   - Yes, I want to add more words or phrases to auto link.

     1. On the **Enter Words or Phrases to Auto Link** page, type in a word or phrase to auto link, and then click **Add**.

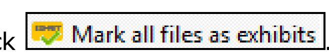


2. In the message box, click **OK**.

3. Continue adding words or phrases until finished.

- No, I do not want to add more words or phrases to auto link.

  Skip to **Step 7**.

By default, all files will be marked as exhibits. To change, click 

.

If the Exhibit name or Autolink ID need to be modified, click the **Exhibit Name** or **Autolink ID** fields to modify. The Autolink ID will update based on the exhibit name.

Exhibit names and Autolink IDs must be unique and cannot be duplicated.

If the **Link exhibit files with autolink aliases** check box is selected, the hyperlink will be created by pairing the Autolink alias with the Autolink ID. If the box is not selected, and there are no Autolink alias names defined, the hyperlink will be created from the Exhibit name.

6. Click **Next**.

7. On the **Completing the Auto Link Exhibit Wizard** page, click **Finish**.

To link an existing linked document to this case

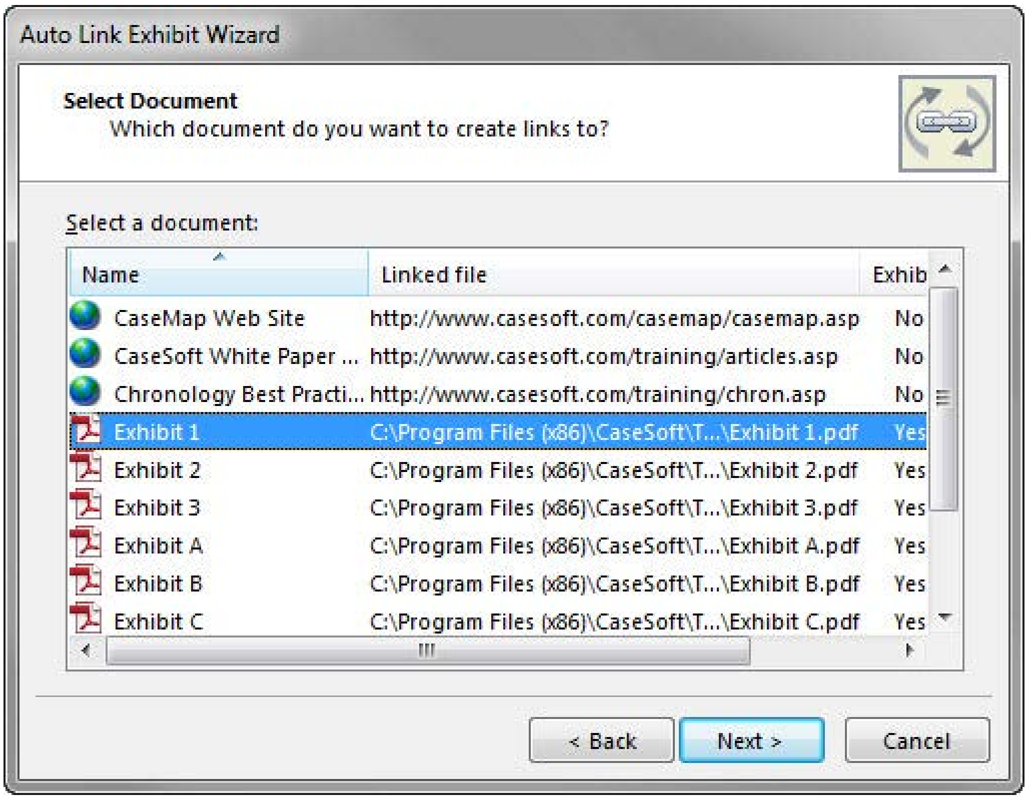
1. In the **Navigation** pane, click the **Exhibits and Video** button.

2. In the **Exhibit Tasks** pane, click **Link exhibits to this transcript** to open the Auto Link Exhibit Wizard.

3. On the **Auto Link Exhibit Wizard's Welcome** page, and then click **Next**.

4. On the **New or Existing Exhibit** page, select the option, **No, I want to link to an existing linked exhibit**, and then click **Next**.

5. On the **Select Exhibit** page, select the file for which you want to link, and then click **Next**.



6. On the **Completing the Auto Link Exhibit Wizard** page, click **Finish**.

   When you click **Finish**, TextMap will open the **Exhibit Properties** dialog for the selected exhibit.

7. In the **Exhibit Properties** dialog box, enter a word or phrase to autolink to this document, and then click **Add**.

   TextMap automatically creates links in the transcript where all instances of the word or phrase is located in the transcript.

8. Continue adding words or phrases until finished, and then click **OK**.

Related Topics

About exhibits
Using TextMap Exhibit Linker
Importing exhibit packages
Creating single hyperlinks in transcripts
Viewing exhibits

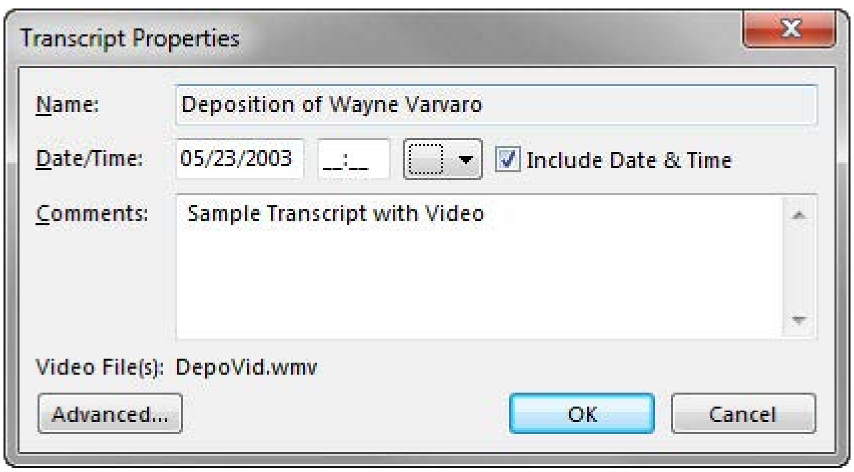
Editing transcript properties

Once transcripts are imported you can view or edit transcript properties for the date/time, comments, video files, and the transcript ID and signature.

To view or edit transcript properties

1. On the **View** ribbon, click **Transcript Properties** to open the Transcript Properties dialog box.

2. In the **Date** box, notice that the date is automatically filled in for you.

   You can modify this date as needed.

3. In the **Time** box, type in the time, then select **AM** or **PM** from the list.

   Notice that the Include Date & Time box is selected by default. Clear this check box if you do not want the date/time to display in the Transcripts pane along with the transcript name.

4. In the **Comments** box, type in any relevant information about the transcript.

5. Click **Advanced** button if you want to view or modify the transcript ID and signature.

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

Related Topics

[About transcripts]
[Importing transcripts]

Renaming transcripts

Edits to a transcript name can be made quite easily.

To rename a transcript

1. In the **Transcripts** pane, click on the transcript you want to rename.
2. On the **Transcript** menu, click **Rename Transcript**.

   You can also right-click on the transcript and then click Rename Transcript.
3. In the **Rename** dialog box, type or edit the transcript name.
4. Click **OK** to save any changes.

Related Topics

[About transcripts]
[Sorting transcripts]
[Deleting transcripts]

Deleting transcripts

Once a transcripts is deleted it is permanently removed from the case. TextMap only supports deleting one transcript at a time.

To delete transcripts

1. In the **Transcripts** pane, click on the transcript you want to delete.
2. On the **Transcript** menu, click **Delete Transcript**.

You can also right-click on the transcript and then click Delete Transcript.

3. In the message to confirm this action, click **Yes**.

Related Topics

[About transcripts]
[Sorting transcripts]
[Creating transcript groups]
[Renaming transcripts]

Sending transcripts to Sanction

To assist in organizing presentations of key evidence for trial, you can connect to a case in Sanction® 3.5 and send information from TextMap to Sanction. Please refer to the Sanction Answer Center for additional information.

To send a transcript to Sanction

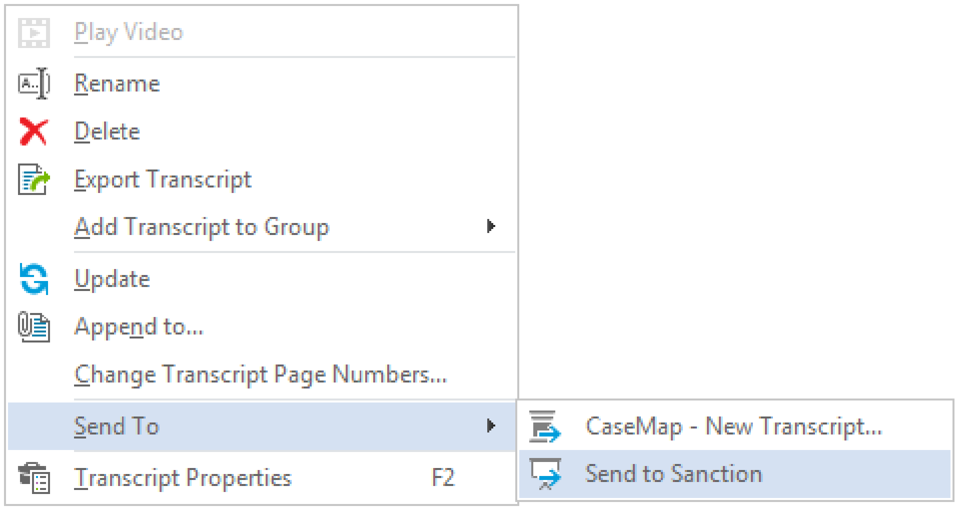
1. Open a case in **Sanction 3.5** or later.

> It is necessary to have a case open in Sanction for the Send Transcript to Sanction option to be successful.

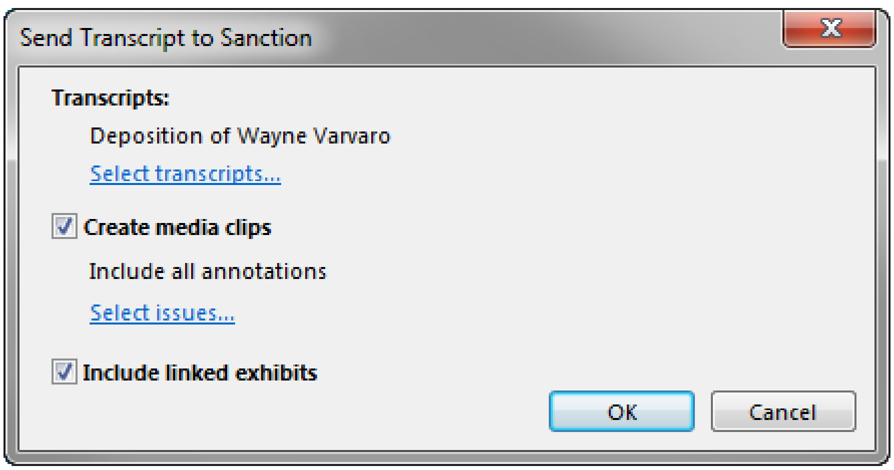
2. In the **Transcript** pane, select/highlight the transcript you want to send to Sanction.

3. On the **Transcript** menu, click the **Send To Sanction** button.

   You can also right-click on a transcript in the list, click Send To, and then click Send to Sanction.



The Send Transcript to Sanction dialog box opens.

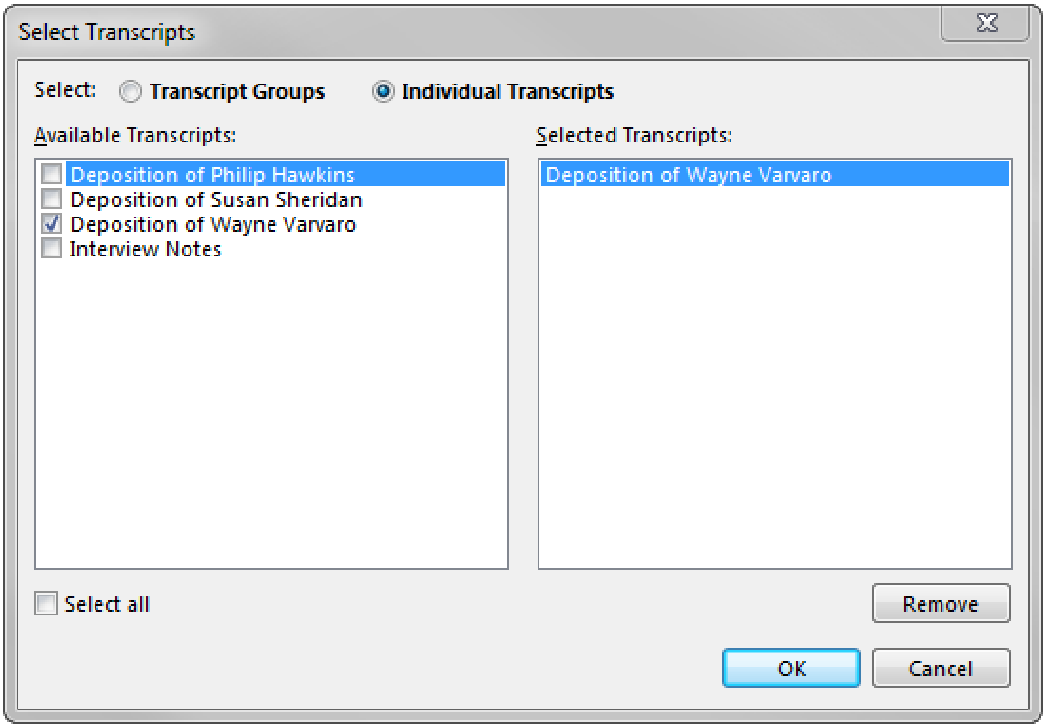


To select multiple transcripts

a. In the **Send Transcript to Sanction** dialog box, click **Select transcripts**.

b. In the **Select Transcripts** dialog box, click **Transcripts Groups** to list transcripts by groups, or click **Individual Transcripts** to list transcripts individually.

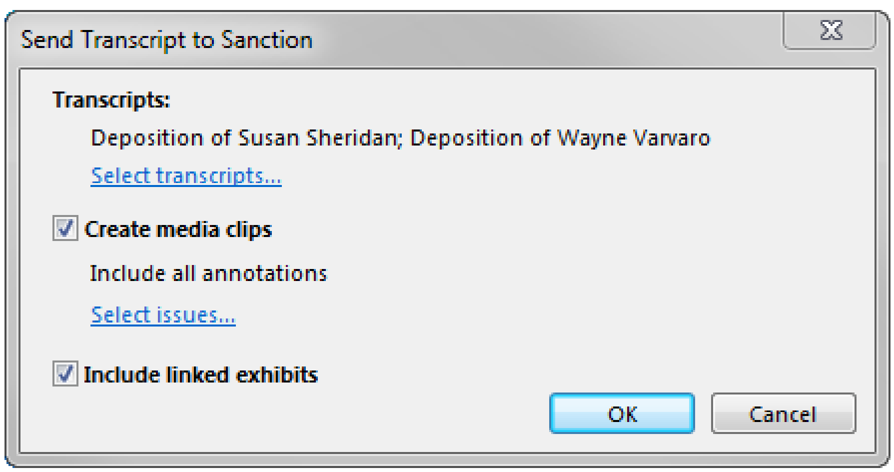
For this example, Individual Transcripts has been selected.



c. In the **Available Transcripts** column, place a check mark beside transcript(s) to be sent to Sanction.

   Optional: Place a check mark in the Select all check box to simultaneously select all transcripts.

d. Click **OK** to display the **Send Transcript to Sanction** dialog box.



To include media clips when sending transcripts to Sanction, see Sending annotations as Sanction media clips.

4. In the **Send Transcript to Sanction** dialog box, click **OK.**

Related Topics

[About transcripts]
[About annotations]
[Sending annotations as Sanction media clips]
[Editing videos]

Sorting Data

About sorting

Sorting determines the order that case elements display in pane views, allowing you to review information in various ways to determine what items need to be addressed first or categorized based on the status of items. Sorting is distinct to each user ID and does not affect the view that others see for this spreadsheet.

Transcripts can be sorted in alphabetical order by name, or by transcript or import date/time. TextMap saves the sort order last used when you re-open the case.

You can sort data in the following places:

- **Transcripts pane** — Sort transcripts or transcripts groups alphabetically by name or by the transcript's date/time, or by the import date.
- **Annotations pane —** Sort by columns in the Annotations pane by Source, Note, Linked Issue, Linked Fact, Text, Created By, and Creation Time Stamp.

Sorting is independent of any filter function. If you filter transcripts or annotations, they are still sorted as specified by the view's sort order.

Related Topics

[Sorting annotations]
[Sorting transcripts]
[About filtering]
[About searching]

Sorting transcripts

The Transcripts pane allows you to sort transcripts in alphabetical order, by date and time, and name. TextMap saves the sort order last used when you re-open the case.

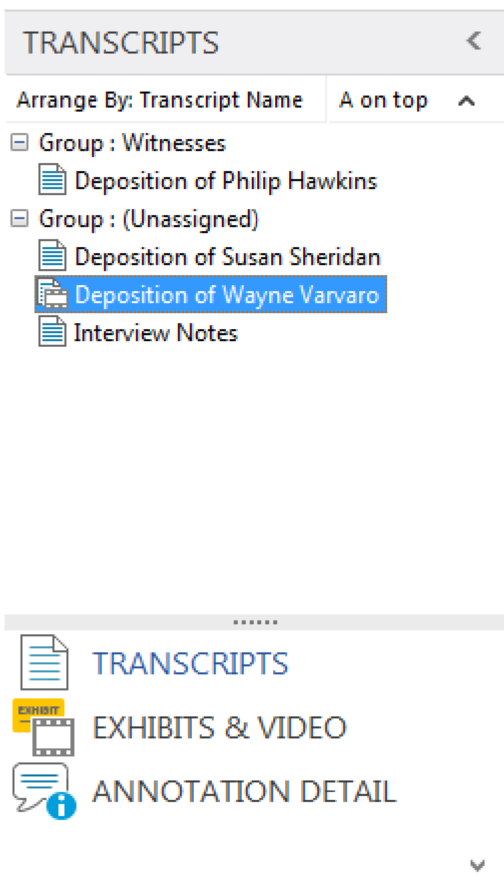
Setting the date/time option is useful when a case contains multiple depositions from the same person. Dates display in brackets to the left of the transcript name in the Transcripts pane. The date and time options are set in the Options dialog box, accessible from the Tools menu. Options are personal to each user's view, and do not affect other users in the same case. If a user changes the date of a transcript, the updated date immediately displays in the list.

When changing from a name sort to a date sort, and vice versa, the Transcripts pane automatically sorts in ascending order from A to Z.

To sort transcripts in alphabetical order

1. In the **Transcripts** pane, click on the **A on top** button to sort transcripts alphabetically in descending order from A to Z.

   You can also click on the View ribbon, and then on the Arrange By tab, click Transcript Name.



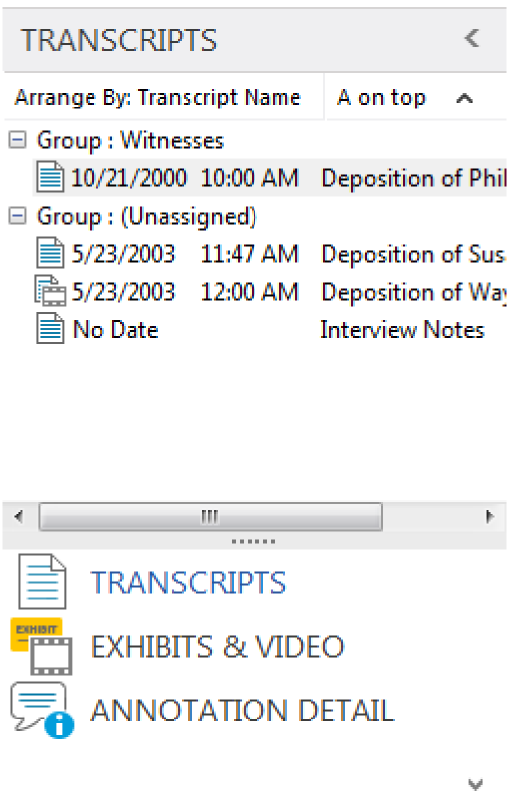
2. Click on the button again to resort transcripts in ascending order from A to Z.

3. On the shortcut menu, click **Transcript Name**.

To sort transcripts by date and time

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click the **Transcripts** tab.
3. Select the check boxes for **Show transcript date** or **Show transcript time**.

   You cannot select the Show transcript time check box without also selecting the Show Transcript date check box.
4. Click **OK** to close the **Options** dialog box.
5. In the **Transcripts** pane, notice that the date and/or time for each transcript now displays.

   Transcripts or interview notes without a date sort to the bottom and display No Date in the Arrange By: column.

   Transcripts will sort by date even if you choose not to display the date and time in the Transcripts pane.
6. Right-click on the **Arrange By:** column header and click **Transcript Date** or **Import Date**.

   Transcripts sorted by date can then be sorted from oldest to newest.

7. You can also click the **Oldest on top** button to sort transcripts from oldest to newest by date and/or time.

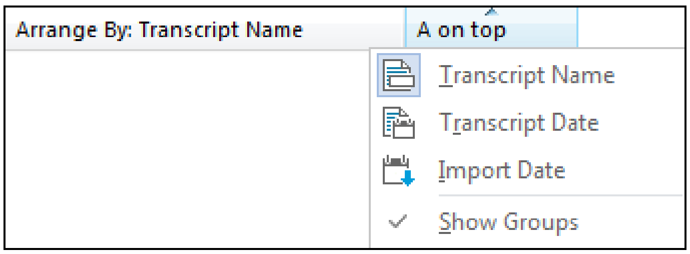
   To resort the list, click the **Newest on top** button.

   To remove the date and time from the Transcripts pane, click Options on the Tools menu and clear the check boxes for showing the transcript date or time on the Transcript tab.

To sort transcripts by group

1. In the **Transcripts** pane, click the **Arrange By:** column header to choose how you want to sort transcripts.

   You can also click on the View ribbon and then select the Show Groups check box.



2. On the shortcut menu, click **Show Groups**.

Related Topics

[About transcripts]
[Importing transcripts]
[Creating transcript groups]

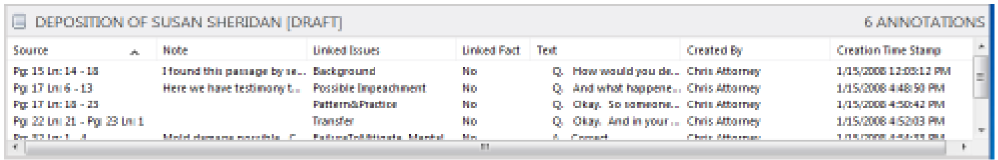
Sorting annotations

The Annotations pane allows you to sort annotations by columns: Source, Note, Linked Issues, Linked Fact, Text, Created By, and Creation Time Stamp. The default sort order is by page/line number.

To sort annotations

1. In the **Transcripts** pane, click on the transcript for which you want to view annotations.

2. In the **Annotations** pane, click on the column you want to sort by.



For example, if you want to sort all annotations by linked issues, click on the Linked Issues column.

All annotations now display by linked issues and in alphabetical order. An arrow displays in the column indicating which column annotations are sorted by.

Related Topics

[About sorting](#)
[About filtering](#)
[Viewing annotations](#)
[Filtering annotations](#)

Filtering Data

About filtering

TextMap allows you to filter both transcripts and annotations. Filtering enhances your viewing capabilities by allowing you to find and focus on specific transcripts or annotations more efficiently. Filtered data remains in the current viewing pane (Transcripts pane or Annotations pane); while other data is temporarily hidden from view.

Related Topics

[Filtering transcripts](#)
[Filtering annotations](#)
[About sorting](#)

Filtering transcripts

Filtering transcripts allows you to quickly locate a transcript and load it for display.

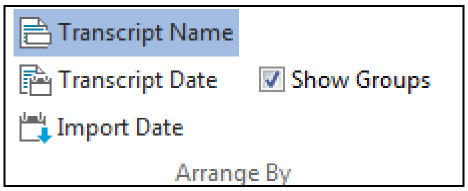
A minimum of 30 transcripts must be imported into the case before the Filter Transcripts by

Name box displays in the Transcripts pane.

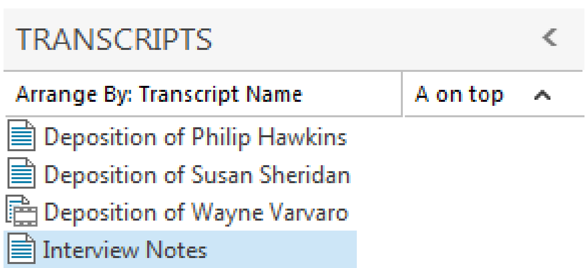
TextMap will automatically save any transcript filter you have. If you close a case, TextMap will display transcripts with the last filter applied.

To filter transcripts by name

1. On the **Arrange By** menu of the **View** ribbon, click **Transcript Name** to sort accordingly all Transcript by name.



The Transcripts pane now displays the transcripts sorted based on the filter.



The transcript now displays in the Transcript window, and any annotations now display in the Annotations pane.

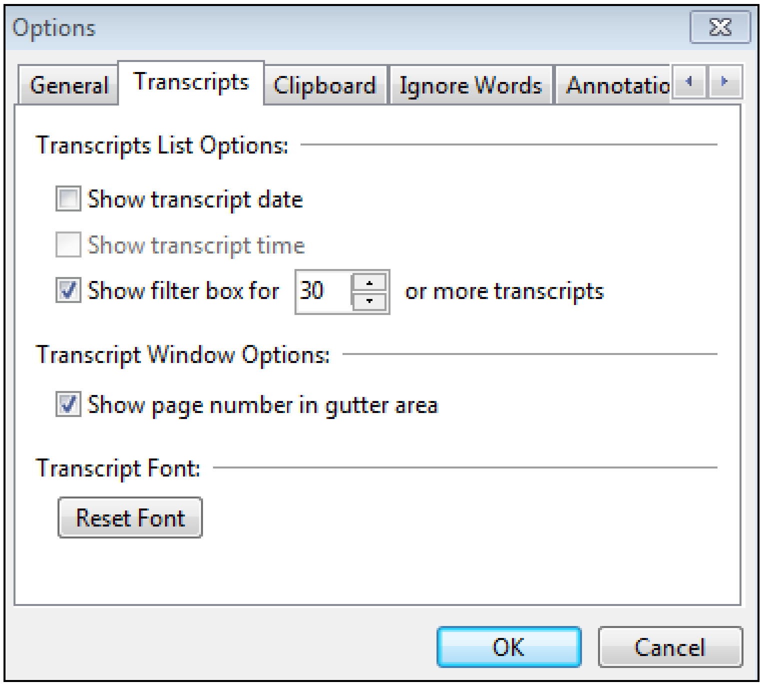
To clear the transcript filter

You can clear the transcript filter four ways:

- Click the Clear button next to the Filter Transcripts by Name box.
- Select text in the Filter Transcript by Name box and then press the Delete key.
- On the View menu, click Show All Transcripts.
- Press the Esc key.

To modify or disable the transcript filter setting

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click on the **Transcripts** tab.



3. In the **Transcripts List Options** area, click the up/down arrows in the number list to set it to the minimum number of transcripts you want in a case before the Filter Transcripts by Name box displays.

   The default setting is for the filter box to display after 30 transcripts are imported into a case. You can adjust this setting by depending on the number of case transcripts in your case.

4. Clear the **Show filter box for 30 or more transcripts** if you want to disable the Filter Transcripts by Name box from displaying in the Transcripts pane.

5. Click **OK** to save your settings.

Related Topics

[About filtering](#)
[Sorting transcripts](#)

Filtering annotations

TextMap now allows you to filter annotations by creator or linked issues. To apply an annotation filter, click the View ribbon and select Filter by Creator or Filter by Linked Issues. (No Filter is the default view, where all annotations display). The selected filter is then applied to all transcripts in the case for the current user session or until another filter option is selected. When you close or re-open a case, any previously applied filters are automatically cleared. The annotation filter status displays in the top right corner of the Annotations pane.

If you or another user deletes an annotation or issue while a filter is applied, it will be deleted regardless.

View filtering considerations

Reference the following table to learn about considerations that affect filtering.

Filtering Considerations	
Filters	**Description**
Filter by Creator	Any new annotations added by other case users when the filter is running only display if they match the current filter.
	If there are no annotations for selected users, the Annotations pane displays a message, Filter Excludes All Annotations.
	Case users who have been deleted will still display with that designation. If an annotation has "unknown" as the creator, you can assign it to another users. See Changing annotations' owner status.
	If the Filter by Creator menu item is grayed out, the case does not currently have any users.
Filter by Linked Issues	Annotations created or edited when the filter is running only display if they match the current filter.
	If you select a parent issue, all child issues are also selected. Clear the check box for any issue you do not want in the filter.
	If an issue filter is already applied, those issues will already be selected in the Filter Annotations by Linked Issues dialog box.
	If there are no annotations for selected issues, the Annotations pane displays a message, Filter Excludes All Annotations, and the Filter by Annotations by Linked Issues dialog box displays a message, There are no issues in this TextMap case.

To filter by creator

1. On the **View** ribbon, click **Filter by Creator** on the **Filter Annotations** tab.
2. In the **Filter Annotations by Creator** dialog box, select one or more users to filter by.

3. Click **OK** to apply the filter.

   Only annotations by selected users now display in the Annotations pane.

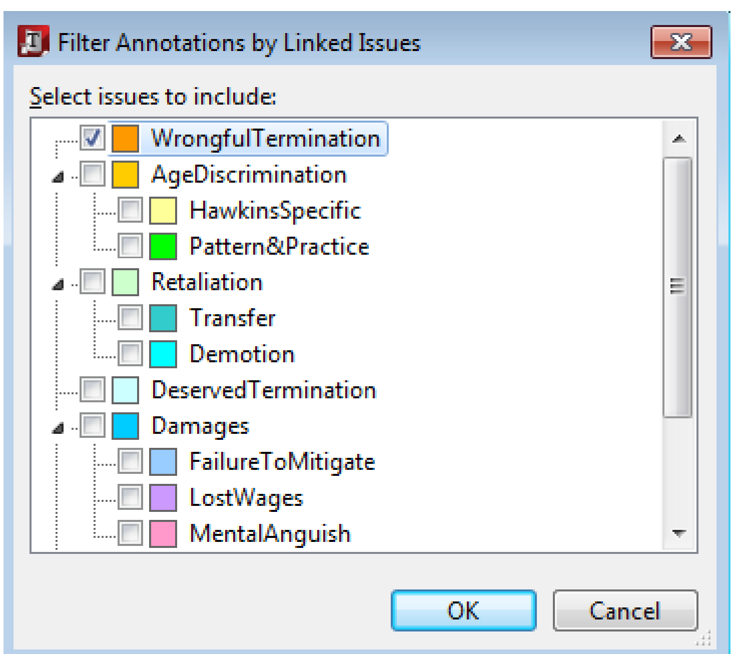
   The information bar in the top right corner of the Annotations pane now displays the number of annotations filtered and total annotations in the transcript.

To filter by linked issues

1. On the **View** ribbon, click **Filter by Linked Issues** on the **Filter Annotations** tab.

2. In the **Filter Annotations by Linked Issues** dialog box, select the check box for each issue you want included in the filter, then click **OK**.

   You can also right-click to check or clear all issues.



Only annotations linked to the selected issues now display in the Annotations pane.

To clear an annotation filter

1. On the **View** menu, click **No Filter** on the **Filter Annotations** tab.

   The previous filter is now removed from all transcripts in the case.

   If you select another filter option, the previous filter is cleared and the new filter is applied.

Related Topics

About annotations
Creating annotations
Viewing annotations
Sorting annotations

Searching Data

About searching

TextMap allows you to quickly search all transcripts, exhibits, documents, annotations, and notes in your case because it automatically creates a case index during the import process.

There are two methods of searching in TextMap:

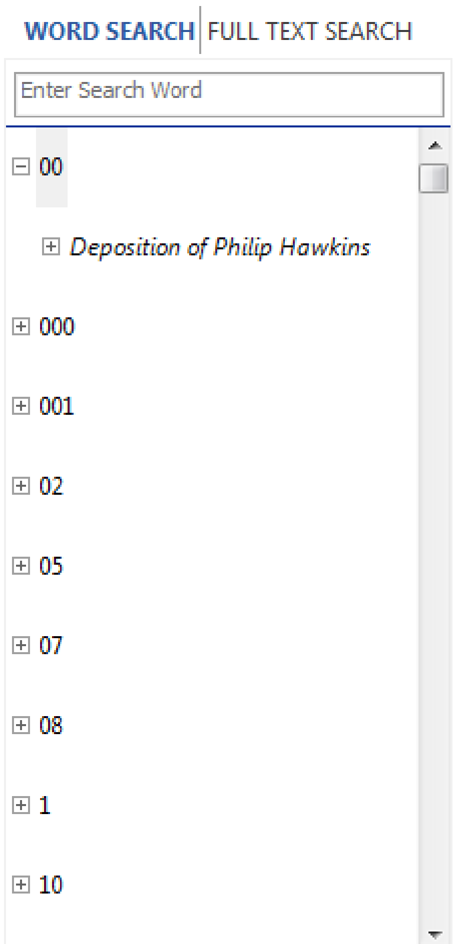
- **Basic Word Searches** — performing single word searches to locate all instances of the word in transcript text.

  See Running basic word searches.
- **Full-Text Searching** — performing full-text searches against transcript text, annotations, and exhibits.

  See About full-text searching.

Learn how the case index works

TextMap creates a case index when you import transcripts and files into a case. During the indexing process, TextMap reads each imported document and compiles a case index based off the each word it reads.



The case index is used when you perform searches so you can locate important words, dates, and text phrases easily in your case.

For more information, see About the case index.

Lean how ignore words help narrow search results

TextMap provides you with a default, global Ignore List and a Case Ignore Words list. Both lists are used by TextMap to skip or ignore words and text from both lists during searches. Words or alphanumeric text can be added or deleted from either list. When search queries are performed, any words or text added to the lists are skipped and not included in search results or tallied as search "hits".

For more information, see Modifying ignore words.

Related Topics

Running basic word searches
Running full-text searches
Running full-text searches

About the case index
Rebuilding the case index
Modifying ignore words

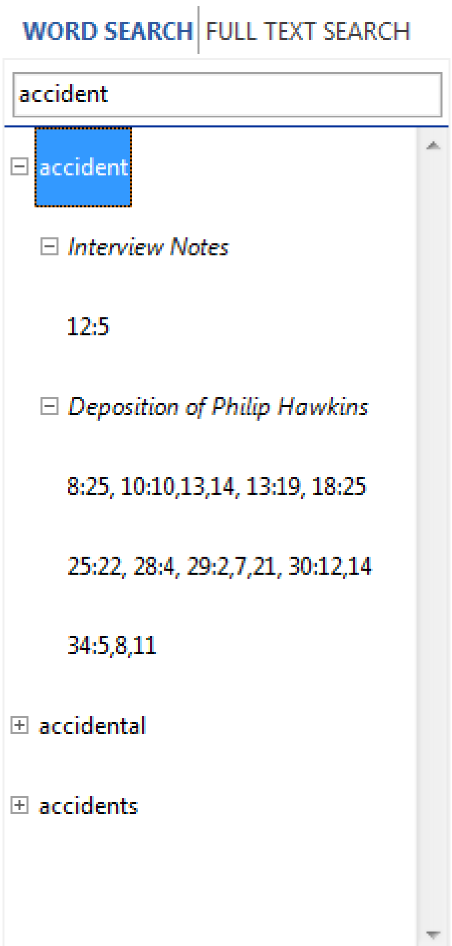
Running basic word searches

Basic word searches are performed to locate all instances of a single word in transcript text for all transcripts in a case. Transcripts that include the search term display in the Word Search pane. Under each transcript are page/line number hyperlinks that jump directly to the search term for that transcript. When you click on a hyperlink, the applicable transcript displays in the main TextMap pane with the search term highlighted.

If you want to search selected transcripts, exhibits, documents, and annotations, you need to run a full-text search. See Running full-text searches.

To run a basic keyword search

1. In the **Search** pane, click the **Word Search** tab.
2. In the **Word Search** box, type in the word you want to locate.



By default, only the words for the selected transcript are displayed in the search results for large cases when it has more than 100 transcripts.

As you type, you will see partial word results display as TextMap matches the root word to other similar words.

Search results display in the Word Search pane and are grouped by transcript.

3. Point your mouse to a hyperlink to display a preview of the the search term that includes the two lines before and after it in the transcript.

4. Click on a page/line number hyperlink to jump directly to the search term within the applicable transcript.

   The applicable transcript displays in the main TextMap pane with the search term highlighted for easy identification.

Related Topics

About searching
About full-text searching
Running full-text searches
Running form-based searches
Modifying ignore words

Full-text Searching

About full-text searching

Full-text searching allows you to run both form-based and full-text searches on all case transcripts or selected transcripts/groups in your case. Once a full-text search is run, you can view and narrow your results in the Search pane.

TextMap offers two methods of full-text searching:

- The **Full Text Search** tab allows you write your own search queries and locate key case information by narrowing your search by categories: transcript text, exhibits, and annotations (also by select issues). You can search all case transcripts or select individual transcripts or transcripts groups. Once a full-text search is run, you can view and narrow your results in the Full-Text Search tab in the Search pane.

  For more information, see Running full-text searches and Using search operators.

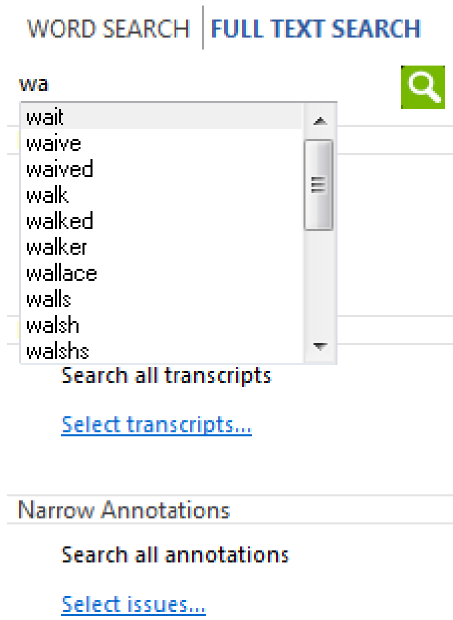
- The **Form Based** tab has search operator parameters provided for you and allows you to locate terms without having to learn about search operators. The Form Based tab allows you to learn about full-text searching without having to write your own queries. Form-based searches are run in the Full Text Search dialog box in the Form Based tab. Once you understand how to use search operators, you can type your own search queries in the Full Text Search tab.

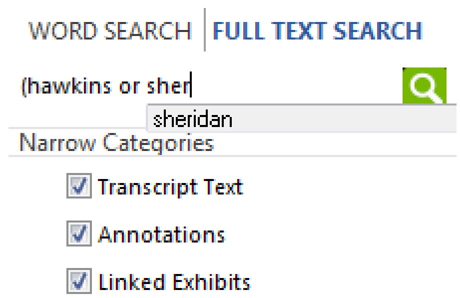
Use the Search Assistant to write faster search queries

As you type in search queries, TextMap's Search Assistant displays suggested terms from the case index to help you write queries faster. The word options narrow as you continue to type. Once you identify a term, click on it or highlight it and press Enter to add it to the search query. Continue typing terms to complete the search query.

Many common words, such as "they", "the", "it" are not included in the case index. Additionally, any words added to the Ignore Word list will simply be ignored in searches.

For more information, see About the case index and Modifying ignore words.





Related Topics

- About searching
- Running basic word searches
- Running full-text searches
- Using search operators
- Adding terms to the case thesaurus

Running full-text searches

Full-text searching allows you to locate key case information by searching transcript text, exhibits, and annotations (also by select issues). You can search each of these categories individually or expand your search further by selecting a combination of categories to include that information in your search results.

The Full Text Search tab also allows you to write your own search queries using search operators, which also help you garner precise search results. See Using search operators.

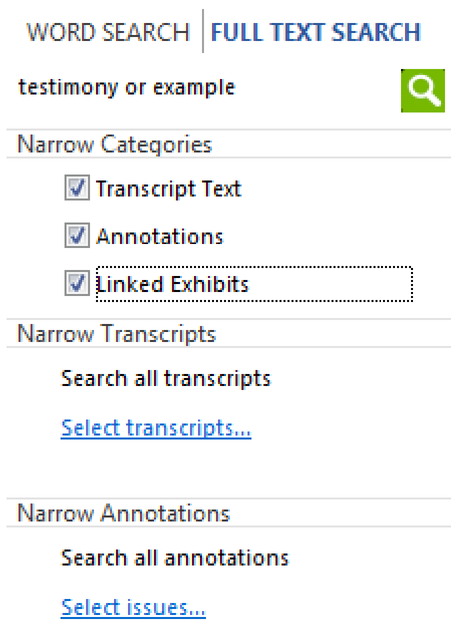
TextMap automatically searches all transcripts by default when a search is run, unless specific transcripts are selected. TextMap will automatically recall selected transcripts from the last search run. This feature is distinct to each user for the current TextMap session. If no searches have been run in the current session, TextMap will default to the All Transcripts setting.

Search results display in the Full Text Search tab after a search is run. See also Viewing/ navigating search results.

To preview search results, expand/reduce the range between search terms, write longer complex queries, view search history, re-run saved searches, or access the case thesaurus, see additional Full Text Search features.

To run a full-text search

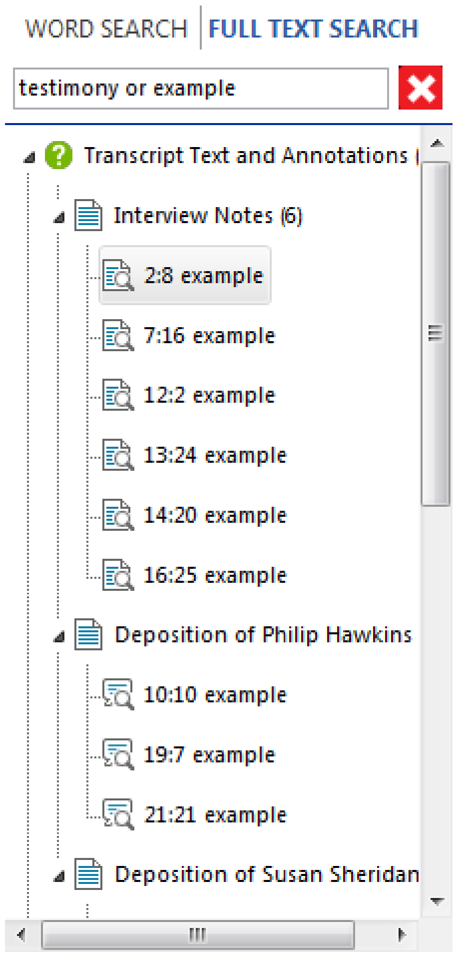
1. In the **Search** pane, click the **Full Text Search** tab.
2. In the **Full Text Search** tab, type in your search query.



3. Click the **Full Text Search** button to run the query.

   Search results are displayed to the right in the Search Pane, and the Search ribbon displays at the top of the workspace.

4. In the **Full Text Search** tab, view the search results.



5. In the **Full Text Search** tab, click on a page/line number hyperlink (example: 15:14) to jump directly to the search term within the applicable transcript or exhibit.

   The transcript displays in the main TextMap window with the search term highlighted for easy identification.

6. On the **Search** ribbon, click **Next Hit** to go to the next term.

7. Optional: On the **Navigate** tab of the **Search** ribbon, click on the:

   Click the First icon to go back to the first search hit.

   Click the Prior icon to go back to the search hit just viewed.

   Click the Last icon to go to the last search hit.

   For more information on viewing and navigating search results, see Viewing search results.

8. Optional: Click **Search Report** to open the Search Report wizard which is used to create a report of your search results.

9. In the Search Report Wizard, complete all steps as applicable.

See Printing a Search report for additional information.

10. Optional: Click **Edit** to edit a saved search.

    See To edit a saved search for additional information.

11. Optional: Click Save to save the search.

    See Saving searches for additional information.

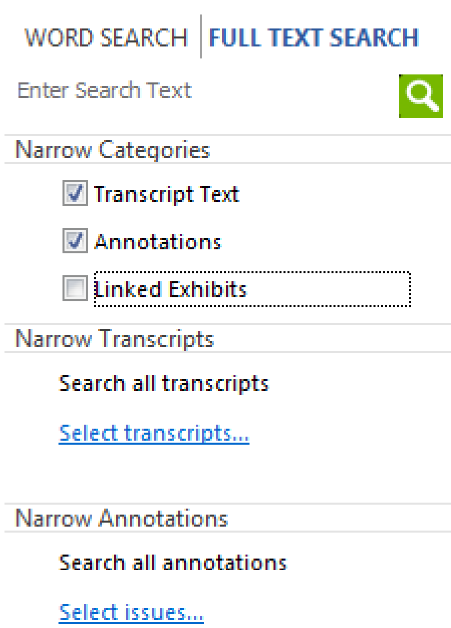
    For more information on viewing and navigating search results, see Viewing search results.

To choose which types of case data to search

A search can be performed and/or narrowed using any combination of categories (i.e., Transcript Text and Annotations). When multiple categories are selected, results for all categories display in the search results.

1. In the **Narrow Categories** pane, select the check box for each category that you want to search. (i.e., Transcript Text and Annotations).

   The Transcript Text check box is selected by default.

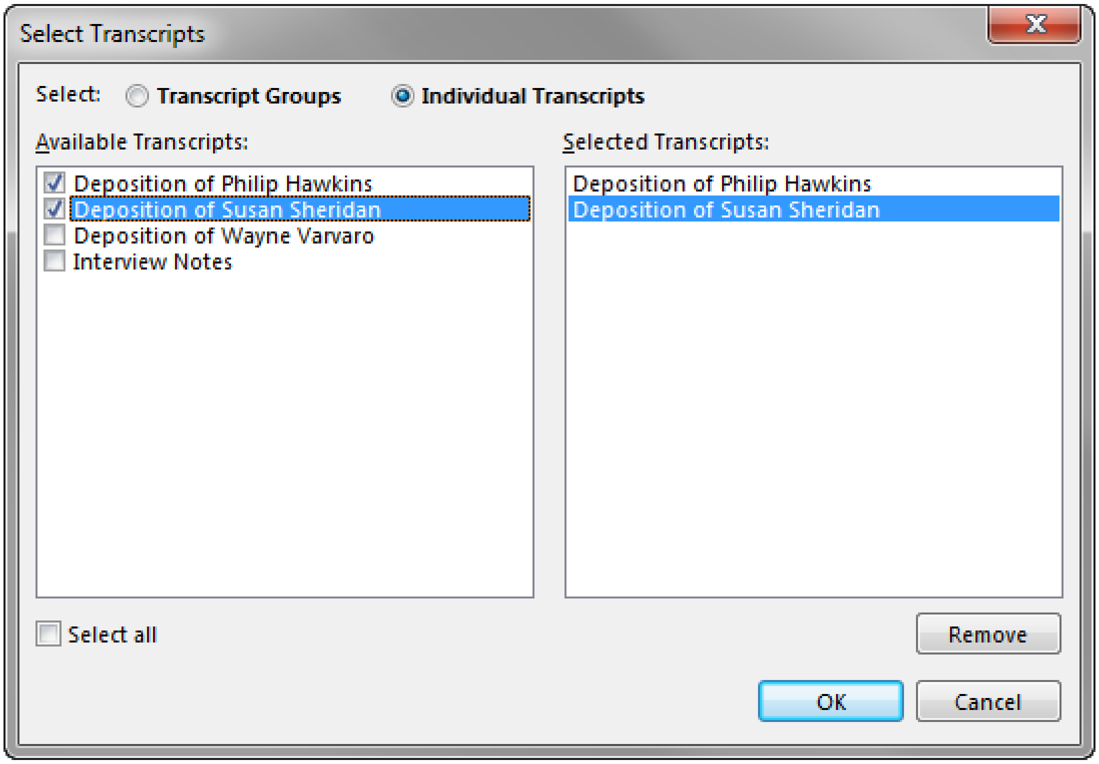


2. Click the Full Text Search button to initiate to search.

   Results display in the Full Text Search tab (right). Search hits in the transcript text are highlighted, and if the first hit is in an annotation, that annotation will be selected.

To select specific transcripts to search

1. In the **Narrow Transcripts** pane, click **Select transcripts** to select specific transcripts or transcripts groups.



3. In the **Select Transcripts** dialog box, select **Transcript Groups** to search a specific group of transcripts, or select **Individual Transcripts** to select/search specific transcripts only, and then click **OK** to continue.

   A Search all transcripts link displays in the Narrow Transcripts pane and can be used to search all transcripts if hits aren't found in previous searches.

4. Click the **Full Text Search** button  to initiate to search.

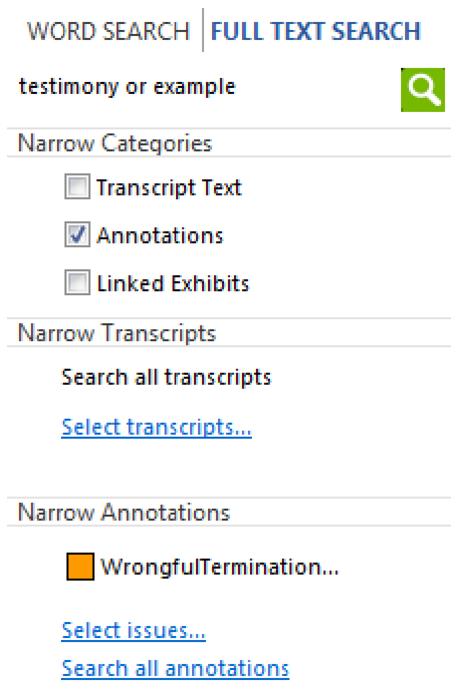
To limit annotations to specific issues

When searching annotations, search results will include annotations that match the search text and are linked to any of the selected issues. You can also search annotations by entering an issue name in the Search box (e.g. if the you search for the Background issue, TextMap will find annotations linked to the issue Background.

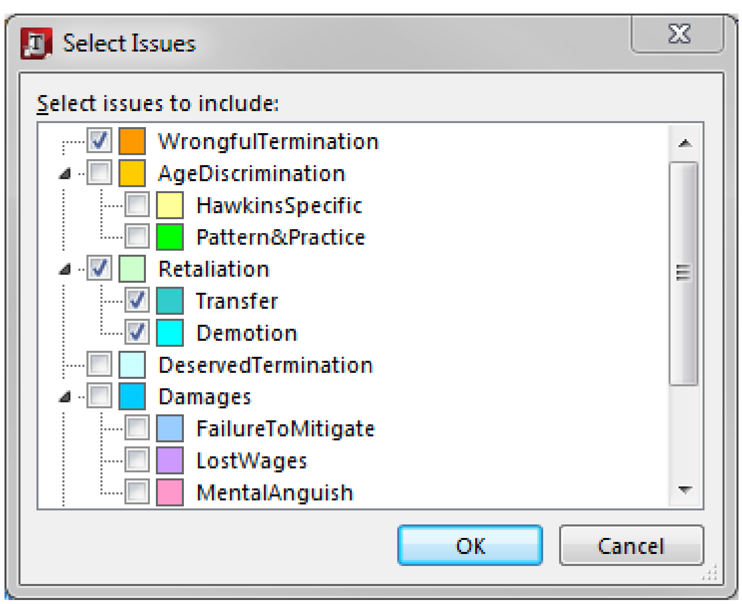
1. In the **Narrow Categories** area, select the **Annotations** check box.

   The Annotations check box must be selected for the Narrow Annotations pane to display.

2. In the **Narrow Annotations** pane, click **Select issues** to focus the search on specific issues.



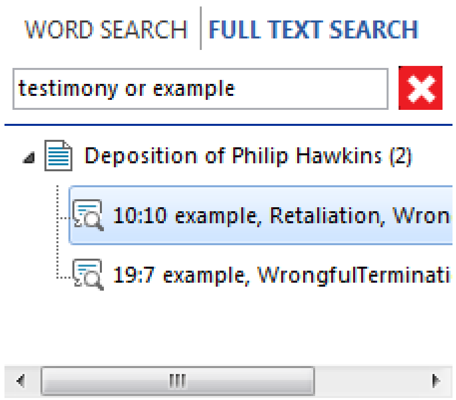
3. In the **Select Issues** screen, select the check box for each issue you want to search, then click **OK**.



The selected issues display in the Narrow Annotations pane.

A Search all annotations link also displays, which can be used to search all annotations if hits aren't found in previous searches. Click Select all annotations to search all annotations and removed the selected issues.

4. Click the **Full Text Search** button to initiate to search.

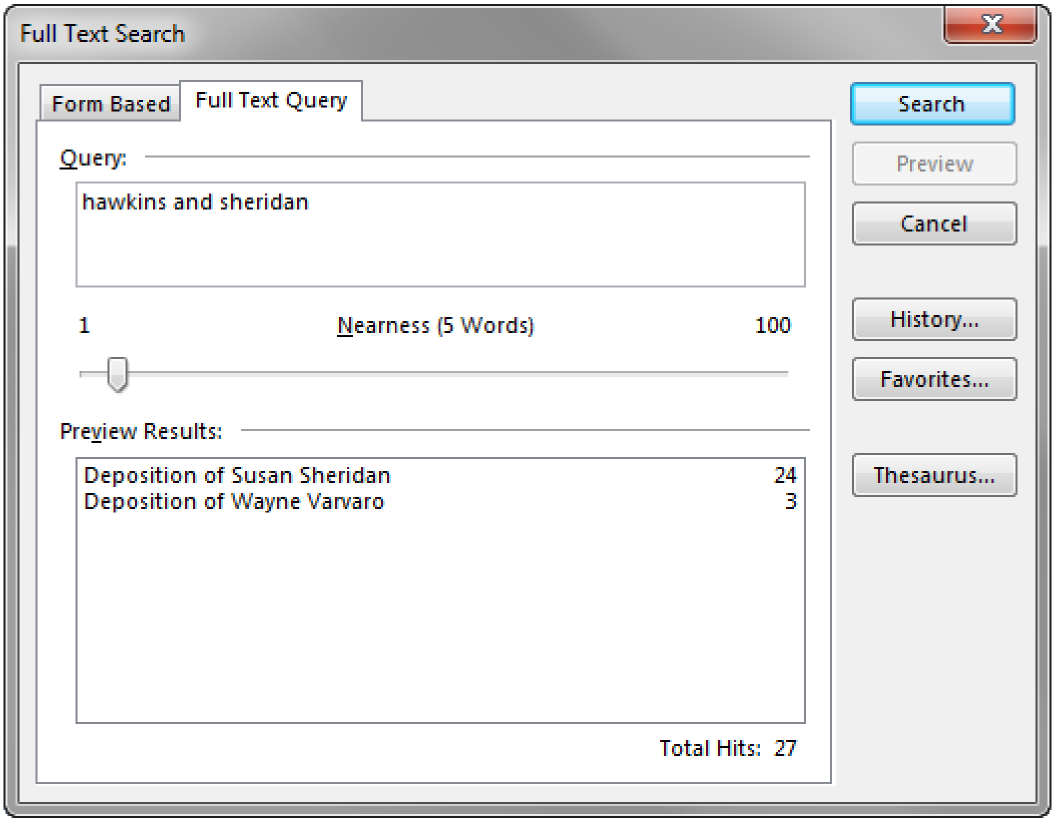


Search results include annotations that match the search text and are linked to any of the selected issues.

If there are no hits/results found based on the search, TextMap will display a message that no hits were found.

To preview search results, adjust the nearness indicator, view saved searches, or run complex queries

You will run the majority of your searches in the Search pane using the Full Text Search tab (located to the right of the Transcript window). When necessary, however, you can access a few more search features by opening the Full Text Search dialog box from the Search menu.



The Full Text Search tab in the Full Text Search dialog box offers a few more search features:

- Previewing search results without having to load all search results

  After you type in a search query in the Query box, you can preview the number of search hits found before loading the full search results. Search results display in the Preview Results box, showing the total number of hits as well as the number of hits found per transcript.

- Adjusting the nearness indicator to expand or reduce the range in which you want locate both words

  The Nearness default setting is used to locate search terms within five words of each other. You can expand/reduce this range from one to 100 words.

- Access saved searches in your My Favorites folder or All Users' Favorites

  See Saving searches

- Access the Thesaurus to find word synonyms in searches

  TextMap offers both a global thesaurus and a case thesaurus so you can find synonyms or "like" terms that are referenced in your case transcripts.

  See Using search operators and Adding terms to the case thesaurus.

- Viewing search history for the past 30 days.

  See Viewing search history.

To open the Full Text Search dialog box from the Search pane, leave the Search Text box blank and then click the the green arrow button .

Related Topics

About full-text searching
Using search operators
Adding terms to the case thesaurus
Viewing/navigating search results
Viewing search results
Saving Searches
Canceling searches
Viewing search history

Running form-based searches

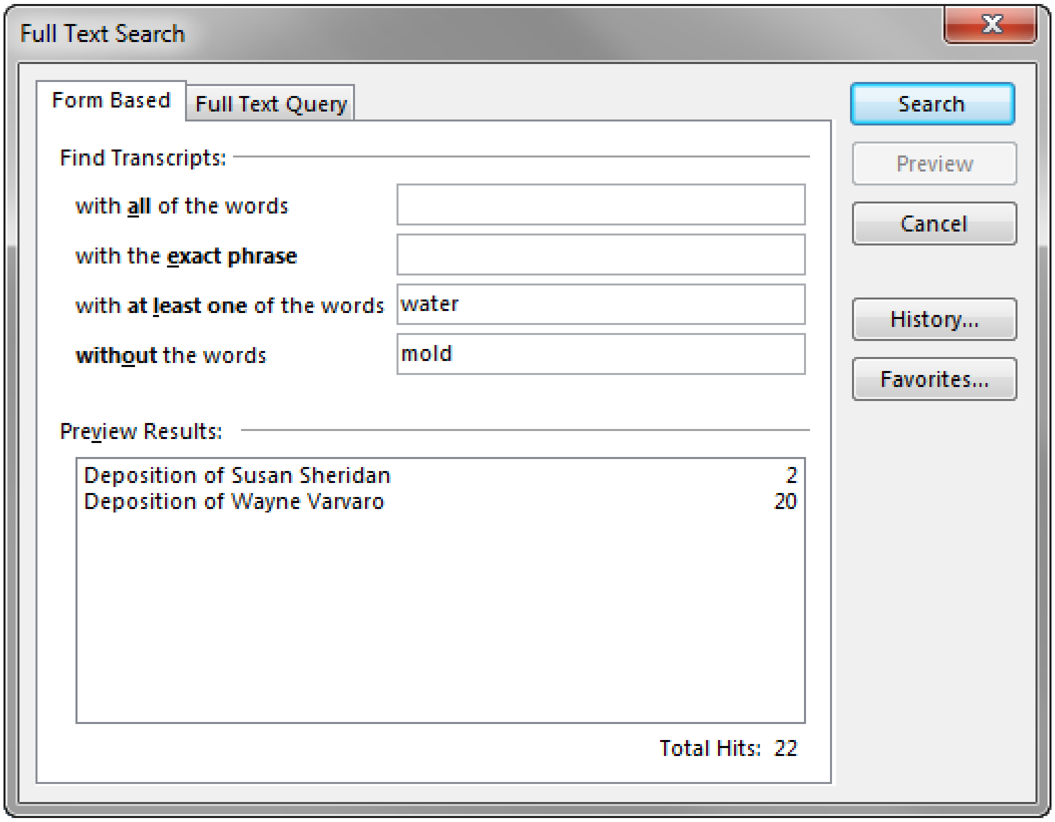
Using the Form Based tab is a great way to practice running full-text searches until you are ready to write your own search queries. The Form Based tab has search operator parameters provided for you and allows you to locate terms without having to learn about search operators. Once you understand how to use search operators, you can type your own search queries in the Full Text Search tab.

Form-based searches are run in the Full Text Search dialog box in the Form Based tab (accessible from the Search ribbon). You can narrow your search by selecting categories in the Full Text Search tab in the Search pane. See Running full-text searches.

TextMap automatically searches all transcripts, unless specific transcripts are selected.

To run a form-based search

1. On the **View** ribbon, click the **Search** icon to open the Full Text Search dialog box.
2. In the **Full Text Search** dialog box, click the **Form Based** tab.



3. In the **Find Transcripts** area, type in the search terms for the option(s) you want to use.
   - with all of the words
   - with the exact phrase
   - with at least one of the words
   - without the words

   You can enter search terms in more than one field to narrow your search results by including or excluding words.

   For example, a search with the exact phrase of water damage and with at least one of the words mold, locates all transcripts that include the phrase water damage and also includes the word mold. Transcripts that include the phrase water damage but do not include the word mold will not display in your search results.

Once you have typed in your search terms, click on the Full Text Query tab to view how the search query is written using search operators. Next time you have a similar search, try typing the query yourself.

5. Click the **Preview** button to review the number of search results found.
6. In the **Preview Results** box, review all transcripts located as well as the number of hits found per transcript.
7. Click the **Search** button to run the search query and view the results in the Search pane.
7. In the **Full Text Search** pane, click on a page/line number hyperlink (ex: 15:14 water) to

jump directly to the search term within the applicable transcript.

The transcript displays in the main TextMap window with the search term highlighted for easy identification.

For more information on viewing and navigating search results, see Viewing/navigating search results.

Related Topics

About full-text searching

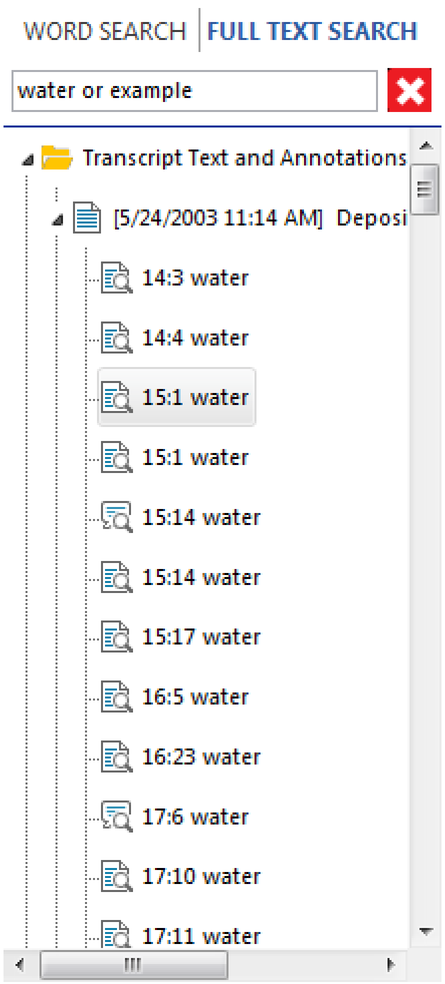
Running full-text searches

Using search operators

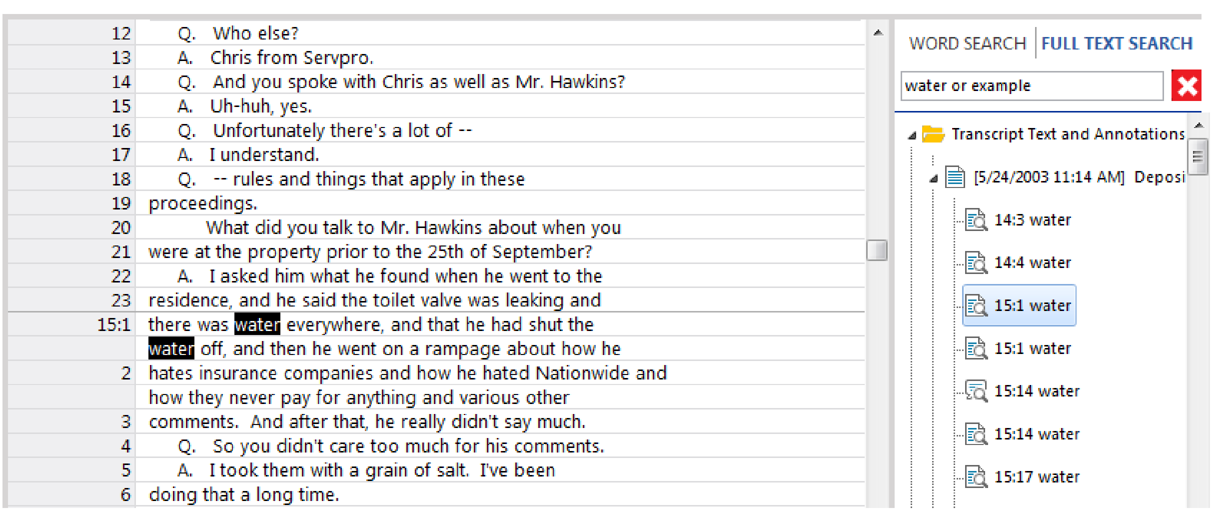
Viewing search results

Viewing/navigating search results

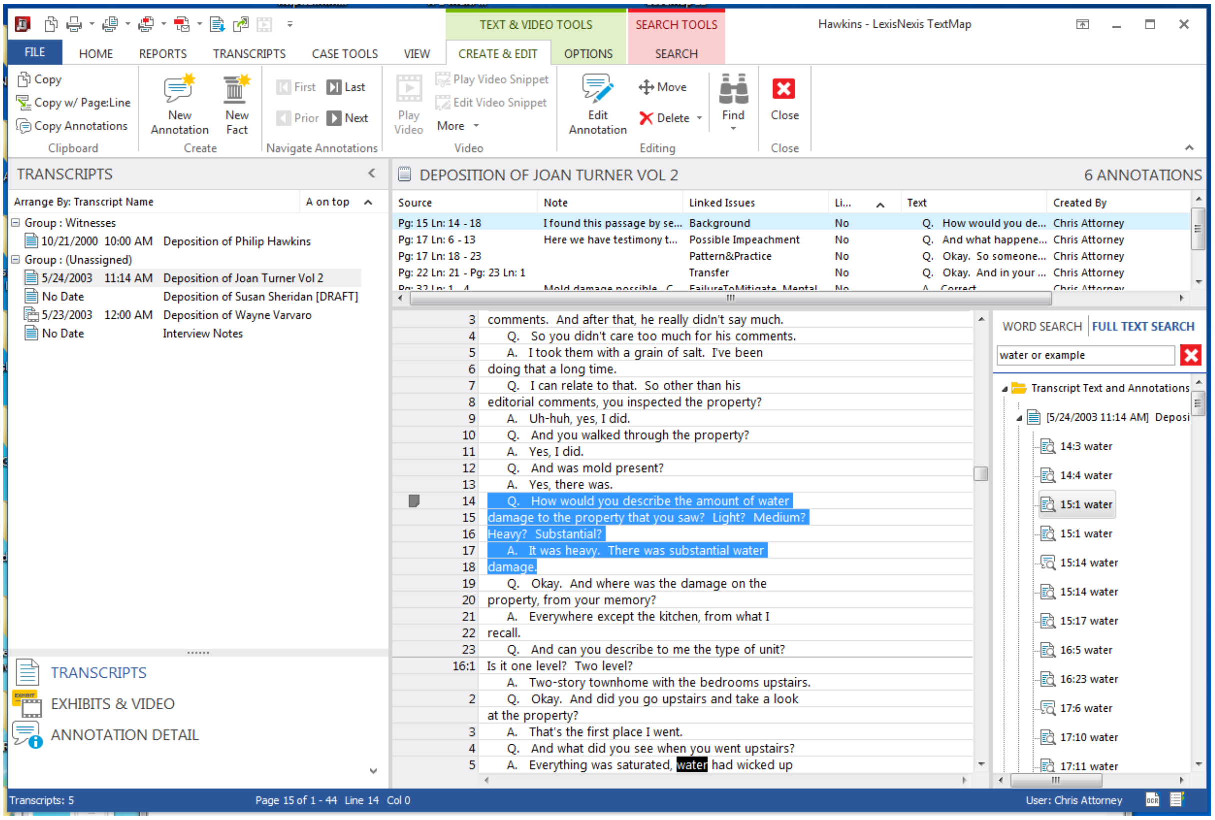
After a full-text search is run, results display in the Search pane in the Full Text Search tab. Search hits for transcripts text, annotations, and exhibits display by transcript. Annotation hits have a yellow comment icon to you help distinguish between transcript text and annotations hits.



The first transcript text hit in your search results is highlighted in black and displays in the main Transcript window (center pane).



If annotations are included in the search (shown in the screen shot below), then the first annotation is displayed in the Transcript window for the first transcript in your search results. The annotation is also highlighted in the Annotations pane (top, above the transcript).



In the Full Text Search tab, you can navigate search hits by:

- Clicking on the transcript text page/line number (e.g., 20:15 testimony) in the Full Text Search tab to jump directly to the search term within the applicable transcript.
- Clicking on an annotation page/line number (e.g., 10:10 example) to jump directly to the annotated text within the applicable transcript.
- Clicking on an exhibit (e.g., Exhibit 1 (1) example) to view the exhibit in the file viewer window.

On the Search ribbon, you can use the features on the Navigate tab 

to navigate and view transcript text and annotation hits. If annotations are included in the search hits, then you can also find these features in the Annotation Detail Pane under the Annotation Properties area.

- **Go to First** — Click Ctrl+F7 to navigate to the first search hit.
- **Go to Prior** — Click or press F7 to navigate to a prior search hit.

- **Go to Next** — Click or press F8 to navigate to the next search hit.
- **Go to Last** — Click Ctrl+F8 to navigate to the last search hit.

Search results can be printed in a Search Report. The Search Report option, available on the Search menu, opens the Search Report Wizard which can be used to create a report of the current search results. See Printing a Search report.

Related Topics

About searching
About full-text searching
Running full-text searches
Running form-based searches
Printing a Search report

Using search operators

Search operators allow you to write your own advanced queries to garner precise search results in your case transcripts and notes. Once you learn to use search operators, you can advance to typing complex searches that will help you locate facts and details that might otherwise take hours of transcript review to uncover.

Full-text queries can be run from the Full Text Search box in the Search pane (or from the Full Text Search dialog box in the Full Text Query tab). See Running full-text searches.

Full-text searches use the following operators:

- Boolean
- Proximity
- Wildcard
- Numeric
- LIKE

Learn about Boolean operators

Boolean operators are based on the binary logic used in computers today, producing strict true or false results. The most common Boolean operators are AND, OR, and NOT.

Search terms are not case sensitive; you don't have to enter all caps for "AND" when typing a search query. However, it is important to type spaces between the search terms and the operator being used.

Boolean Operators		
Operator	**Query**	**Results**
AND contains both words	water AND damage	All transcripts with both the words: water and damage
OR contains either word	water OR damage	All transcripts with either water or damage, or both
NOT contains first word, but not second	water and NOT damage	All transcripts with water, but not damage

Learn about proximity operators

Proximity operators are useful in finding text that appears in transcripts within a specified range of words. The proximity operators used in TextMap are NEAR and BEFORE.

You can use the Nearness scroll bar to adjust the range of terms you want from zero to 100. This range is the maximum number of intervening indexed words, excluding those on the ignore list. The Nearness default range is set to five terms.

Proximity Operators		
Operator	**Query**	**Results**
NEAR	water NEAR3 mold	Both terms appear within three words of each other
BEFORE	water BEFORE3 damage	All transcripts where water is three words before damage

Learn about wildcard operators

Wildcard operators are symbols you can use as a substitute for characters or series of characters, creating a broader search with stronger results.

Wildcard Operators		
Operator	**Query**	**Results**
Asterisk * replaces a character at the beginning or end of a search string	*count* leak* *holding	Finds the following: account, accountant, country, countries, and discount Finds the following: leak, leakage, leaking Finds the following results: withholding
Question mark ? represents any character in its place in the character sequence	wom?n ??99 10:??	Finds the following: woman, women Finds all dates in the year 1999 Finds all timeframes of 10:00 o'clock (a.m. or p.m.), i.e. 10:00, 10:42
[ ] represents any character specified within the brackets [afp], or in a range of characters specified in its place in the character sequence [a-z]	New[a-s] New[prt]	Finds news, but not newt Finds newt, but not news

Learn about numeric operators

Use numeric operators to help you locate numbers in a transcript.

Numeric Operators		
Operator	**Query**	**Results**
< less than	< 50 Florida < 32803	Finds numbers less than 50 Finds Florida followed by a number less than 32803
> greater than	> 50	Finds numbers greater than 50
<= less than or equal to	<=50	Finds numbers less than or equal to 50
>= greater than or equal to	>=50	Finds numbers greater than or equal to 50
= equal to	=50	Finds the number 50

Numeric Operators		
Operator	**Query**	**Results**
<x and >x not equal to	<50 and >50	Finds all numbers except 50

Learn about the LIKE operator

Use the LIKE operator to finds synonyms from the global and case thesauruses for the search term you specify. The global thesaurus and case thesaurus include lists of terms that have been defined as having the same meaning. You cannot add new terms to the global thesaurus, but you can add terms to the case thesaurus so you do not miss those references in a transcript search. This is especially helpful if you have a case with many similar terms mentioned that may mean the same thing.

Example: LIKE water

A search like this may return results for irrigation and wet.

Example: LIKE aspirin

For a case involving the pain reliever aspirin, you may want to add the terms: Advil®, Bayer®, ibuprofen, and Tylenol®.

Example: LIKE mold

For a case involving mold, you may want to add the types of mold strains, such as Stachybotrys, Penicillium, and Aspergillus.

For more information, see Adding terms to the case thesaurus.

Learn about advanced searches and operator precedence

Advanced queries can combine multiple operators and search terms. TextMap uses a hierarchy to evaluate search queries and return results in a specific order. When you combine search queries, you can use parentheses to enforce operator precedence. Searches within parentheses are evaluated before they are combined with other search operators. Parentheses have the highest precedence.

How the operator hierarchy works

TextMap searches terms in a query in the following operator precedence.

Operator order of precedence:

- Wildcard characters
- LIKE

- Numerics
- NOT
- OR
- BEFORE, NEAR
- AND

Example: mold AND carpet OR drywall

In this query, "carpet OR drywall" has search precedence over "mold AND".

The same would be true if the query were reversed: "carpet OR drywall AND mold". Both queries return the same results.

Example: mold BEFORE carpet NEAR drywall

Search queries that have operators at the same precedence level are processed from left to right. In the example query, "mold BEFORE carpet" is processed first, then "NEAR drywall".

The query can be reversed by using parentheses to override the operator precedence.

Example: mold BEFORE (carpet NEAR drywall)

In this query, the search term and operator within the parentheses (carpet NEAR drywall) is processed first, regardless of the left-to-right precedence.

Use parentheses to enforce operator precedence

When formulating search queries with more than one search operator, we recommend you use parentheses. By using parenthesis, you can force TextMap to search the terms you type within the parentheses first, regardless of operator precedence. This allows you flexibility in formulating your own searches and garnering stronger results.

Example: mold NEAR25 (seminar* OR train*)

This query returns results where "mold" appears in a transcript within 25 words of "seminar", "seminars", or "training".

The OR operator carries precedence because the search results do not return instances where "mold" may appear in a transcript within a range of 50 words of "seminar", "seminars", or "training".

How to formulate complex queries

Complex queries are advanced queries that contain two or more operators and multiple search terms. Using parentheses helps to offset search terms so you can read your queries easier.

Example: valve OR main NEAR25 crew OR LIKE employees

This query returns results for "valve" or "main" first. Then TextMap finds these terms within a range of 25 words of "crew" or synonyms of "employees". You can adjust the range of words by moving the Nearness indicator in the Full Text Query tab or simply changing the number value typed with the NEAR operator.

Because of operator precedence, this query is also the equivalent of: (valve OR main) NEAR25 (crew or LIKE employees).

Example: LIKE water NEAR50 valve* OR main

This query finds "water" or synonyms of water within a range of 50 words of "valve", "valves", or "main".

Because of operator precedence, this query is also the equivalent of: (LIKE car) NEAR50 (valve* OR main)

Related Topics

About full-text searching
Running full-text searches
Creating transcript groups
Adding terms to the case thesaurus
Saving searches
Viewing search history

Viewing search history

TextMap stores your full-text search queries for up to 30 days. You can view and reference search history from Search menu by clicking Full Text Search and then clicking the History button. Search history is individual to each user ID; you will not see other users' search history.

Search history for each stored query includes the query text and the date/time the search was run. Click on an individual search to display search details, including the query text. Searches can be reloaded to edit or re-run from the Full Text Search dialog box.

Delete searches as needed to clear search history. Once a search is deleted it is permanently removed from the case. Any searches older than 30 days are automatically deleted by TextMap.

To view search history

1. On the **Search** ribbon, click **Edit** to open the **Full Text Search** dialog box.

A search must be run to activate the Edit button.

2. In the **Full Text Search** dialog box, click the **History** button.
3. In the **Search History** dialog box, scroll to view recent search history.
4. Click on a search to view search details, including the query text and transcripts included when the query was run.
5. Click **Close** when you are finished.

To load and rerun a stored search

1. On the **Search** ribbon, click **Edit** to open the **Full Text Search** dialog box.
2. In the **Full Text Search** dialog box, click the **History** button.
3. In the **Searches** box, click on the search you want to edit or run again.
4. Click the **Load** button to open the Advanced Search dialog box.

   Notice that the search now displays in the Query box in the Full Text Query tab.
5. Click the **Search** button to re-run or edit the search.

To delete search history

1. On the **Search** ribbon, click **Edit** to open the **Full Text Search** dialog box.
2. In the **Full Text Search** dialog box, click the **History** button.
3. In the **Search History** dialog box, highlight the searches you want to delete.
4. Click the **Delete** button.
5. In the message box, click **Yes**.
6. Click **Close** and then click **Cancel** to continue.

Related Topics

About full-text searching
Saving searches

Saving searches

There are many reasons to save your search queries. One primary benefit is that once saved, you can re-run them on updated case transcripts to collect new search results.

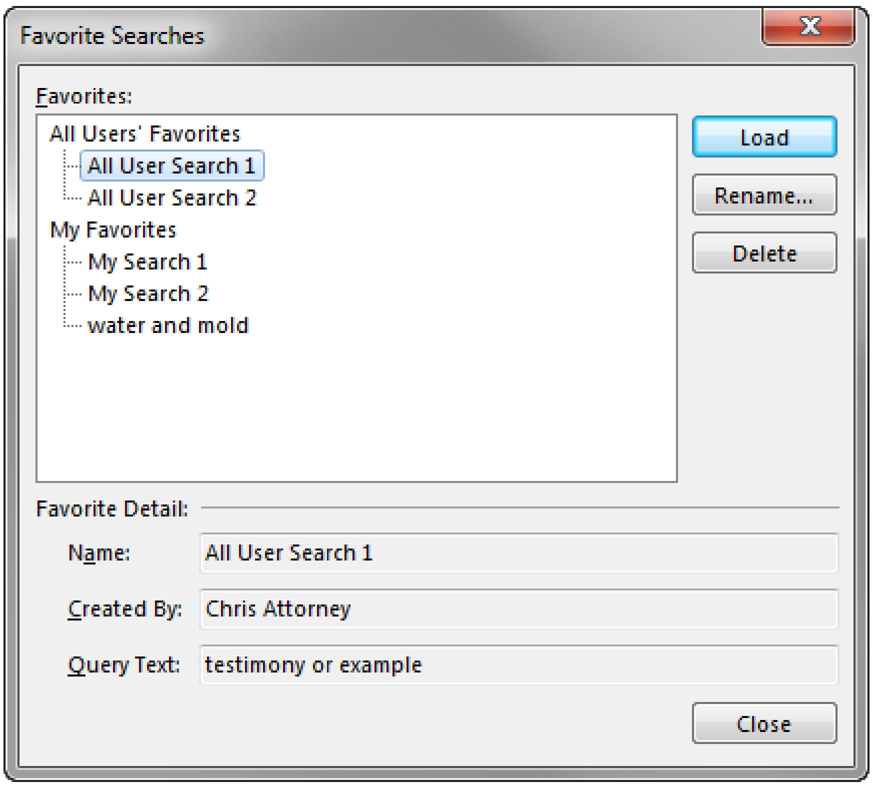
Reasons to save your search queries:

- You need to perform the same search more than once.

- You create complex queries and do not want to retype or forget them.
- You can re-run searches when new transcripts are imported into the case.
- Other case staff can run or build upon saved searches, saving data entry time.
- You are interrupted during a complicated set of searches that you want to resume later.

You can save search queries two ways:

- **My Favorite Searches** — Search queries you save that only you can re-run.
- **All Case Users' Favorite Searches** — Search queries saved and accessible for all case staff to run.



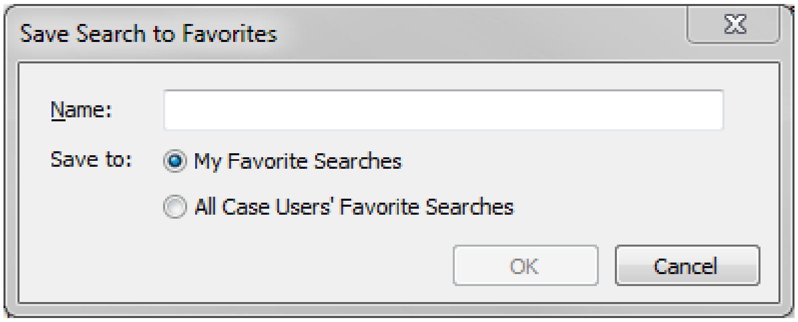
Saved searches are stored in Favorites folders: All Users' Favorites or My Favorites (your personal searches). Each saved search name must be unique when saved within a Favorites folder, though both folders may contain searches with the same name. Search names are case sensitive and can be up to 50 characters. Saved searches display in alphabetical order.

You can overwrite previous saved searches with the same name. TextMap displays a message box when you try to save a search with a search name that has already been used. You have the option to overwrite the previous saved search or you can save the search with a unique name.

In the Favorite Searches dialog box, click on a saved search to view additional information in the Favorite Detail area, including the search name, who created it, and the query text.

To save a search

1. Run a form-based or full-text search.
2. On the **Search** ribbon, click **Save**.
3. In the **Save Search to Favorites** dialog box, type a name that identifies the query.



4. Select the save option you want: **My Favorite Searches** or **All Case Users' Favorite Searches**.
5. Click **OK** to save the search query.

To re-run a saved search

1. On the **Search** ribbon, click **Edit** to open the **Full Text Search** dialog box.
2. In the **Full Text Search** dialog box, click the **Favorites** button.
3. In the **Favorite Searches** dialog box, highlight the search you want to re-run.
4. Click the **Load** button.

   The search now displays in the Query box in the Full Text Query tab.
5. Click the **Search** button to re-run the search.

> You can also re-run searches from the Search History tab. For more information, see Viewing search history.

To rename a saved search

1. On the **Search** ribbon, click **Edit** to open the **Full Text Search** dialog box.
2. In the **Full Text Search** dialog box, click the **Favorites** button.
3. In the **Favorite Searches** dialog box, highlight the search you want to rename, then click the **Rename** button.
4. In the **Rename Favorite Search** dialog box, type in the new search name, then click **OK**.
5. Click **Close** and then click **Cancel** to continue.

To edit a saved search

1. On the **Search** ribbon, click **Edit** to open the **Full Text Search** dialog box.

2. In the **Full Text Search** dialog box, click the **Favorites** button.
3. In the **Favorite Searches** dialog box, highlight the search you want to edit.
4. Click the **Load** button.
5. In the **Query** box on the **Full Text Query** tab, edit the search query.
6. Click the **Search** button to run the search.

To delete a saved search

1. On the **Search** ribbon, click **Edit** to open the **Full Text Search** dialog box.
2. In the **Full Text Search** dialog box, click the **Favorites** button.
3. In the **Favorite Searches** dialog box, highlight the search you want to delete, then click the **Delete** button.
4. In the message box, click **Yes**.
5. Click **Close** and then click **Cancel** to continue.

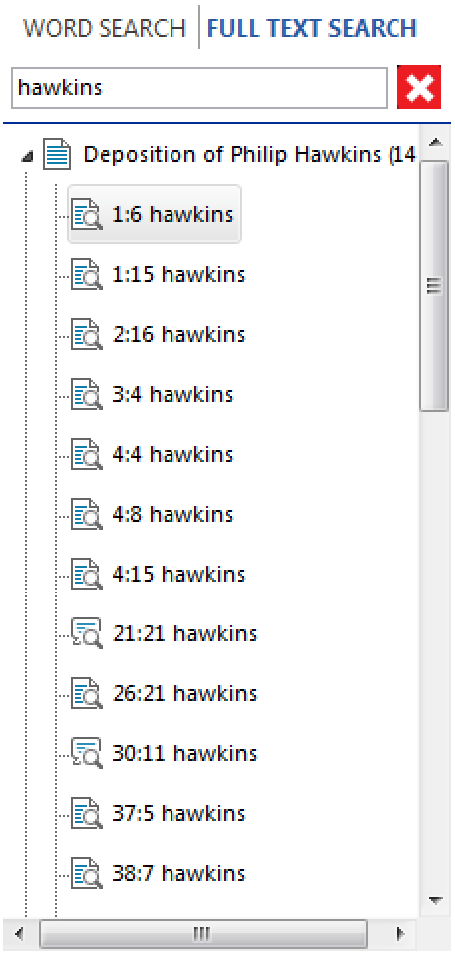
Related Topics

About full-text searching
Using search operators
Running full-text searches
Viewing search results
Canceling searches
Viewing search history

Canceling searches

After running a search and reviewing the results, you can easily cancel/clear the search results by clicking the Cancel Search button in the Full Text Search tab.

You can also click on the Search ribbon and then click Close Search, or you can type over a search query in the Full Text Search box and click the Full Text Search button to run the new search.



Once the search is canceled, the query is deleted from the Search box and the Full Text Search tab refreshes to display the Narrow Categories, Narrow Transcripts, and Narrow Annotations areas.

Related Topics

About searching
Running full-text searches
Saving searches

Adding terms to the case thesaurus

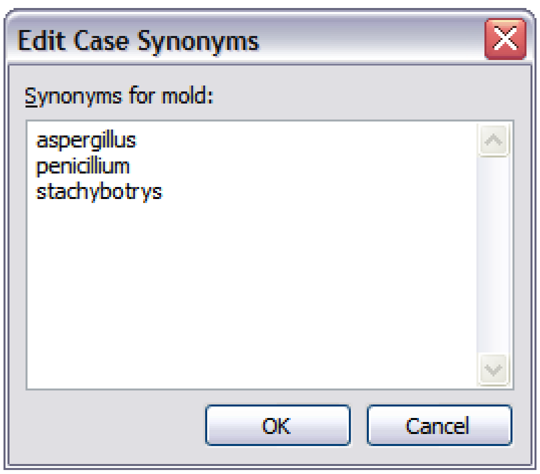
TextMap includes a global thesaurus that helps process advanced, full-text query searches using the LIKE operator. Search results will include synonyms found in the global thesaurus or synonyms you add to the case thesaurus that are specific to the current case. A synonym is a word having the same or nearly the same meaning as another. Case synonyms have a maximum character limit of 30 and display in alphabetical order.

For more information, see Learn about the LIKE operator.

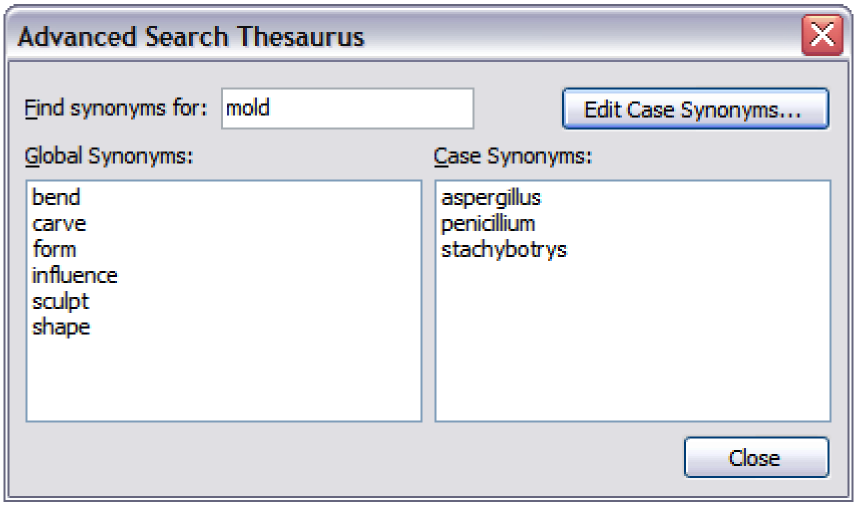
To add synonyms to the case thesaurus

1. On the **Search** ribbon, click **Edit** to open the **Full Text Search** dialog box.
2. In the **Full Text Search** dialog box, click the **Thesaurus** button.
3. In the **Advanced Search Thesaurus** dialog box, type in a word in the **Find Synonyms for** box.

   Synonyms from the global thesaurus display in the Global Synonyms box.
4. Click the **Edit Case Synonyms** button to add similar words to the case thesaurus.
5. In the **Edit Case Synonyms** dialog box, type a synonym that applies to transcripts in your case, then press **Enter**.

   The new words now display in the Case Synonyms box.



6. Continue typing in synonyms until you are finished, then click **OK**.

   Each time you type a synonym, press Enter to add a new word.

7. Click the **Close** button to save new words.

8. In the **Full Text Search** dialog box, click **Cancel**.

   New searches will now capture the synonyms you added to the case thesaurus.

To edit case synonyms

1. On the **Search** menu, click **Full Text Search**.
2. In the **Full Text Search** dialog box, click the **Thesaurus** button.
3. In the **Advanced Search Thesaurus** dialog box, type the word in the **Find Synonyms for** box for which you want to edit synonyms.
4. Click the **Edit Case Synonyms** button.
5. In the **Edit Case Synonyms** dialog box, select the word you want and make any necessary edits.
6. Click **OK** to save your changes.
7. In the **Advanced Search Thesaurus** dialog box, click **Close**.
8. In the **Full Text Search** dialog box, click **Cancel**.

To delete case synonyms

1. On the **Search** menu, click **Full Text Search**.
2. In the **Full Text Search** dialog box, click the **Thesaurus** button.
3. In the **Advanced Search Thesaurus** dialog box, type the word in the **Find Synonyms for** box that you want to delete.

4. Click the **Edit Case Synonyms** button.
5. In the **Edit Case Synonyms dialog** box, select the word you want to delete and press **Delete** twice to remove the word and the space in the list.
6. Click **OK** to save your changes.
7. In the **Advanced Search Thesaurus** dialog box, click **Close**.
8. In the **Full Text Search** dialog box, click **Cancel**.

Related Topics

About advanced searching
Using search operators

About the Search report

TextMap can prepare a Search Report from any full-text search that you run. The Search Report includes the search and highlights the terms located in the transcript. To print a Search report, click the Reports ribbon or the Search ribbon and then click Search Report to open the Search Report Wizard. Complete the steps outlined in the wizard to complete the report.

For more information, see Printing a Search report.

Related Topics

Running full-text searches
Saving searches
Printing a Search report

Annotating Transcripts

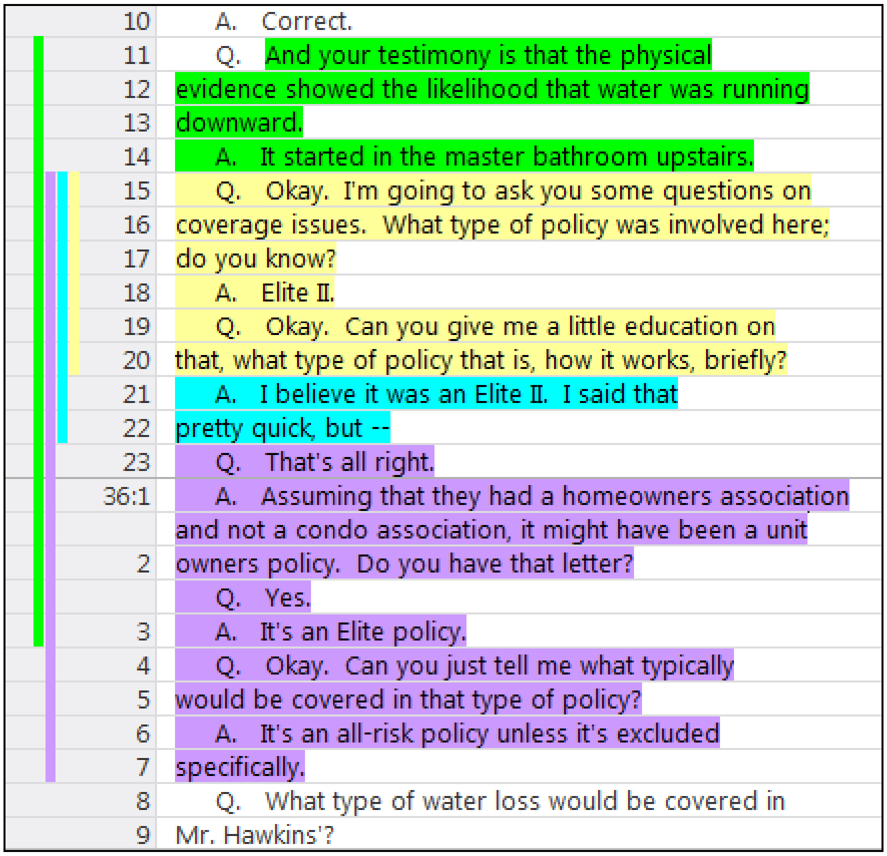
About annotations

After transcripts have been imported into TextMap, they are ready to be analyzed and annotated. During this process, you will select phrases, sentences and paragraphs, and comment on them. You will also use TextMap to categorize text selections and attach files.

Any note that you can put on a sticky note, you can create in TextMap. Add annotation notes to explain why a section is important, mark a section to research further, or flag a certain section as important to build or refute your case. You can create a list of claims and arguments related to a case and then categorize notes related to the issues. You can also import an issues list that you created in CaseMap or import a list of opposing designations.

In TextMap, all issues are initially set to the default color yellow. You can assign each issue a color so that it can be easily identified when scrolling through the transcript. For instance, you could color code all research items red to be easily recognizable. See About case issues and Creating case issues.

Annotations that overlap each other will display colored bars to the left of a transcript. Each color represents the issue color designated for the annotation and shows where each annotation begins and ends.


A. Correct.
Q. And your testimony is that the physical evidence showed the likelihood that water was running downward.
A. It started in the master bathroom upstairs.
Q. Okay. I'm going to ask you some questions on coverage issues. What type of policy was involved here; do you know?
A. Elite II.
Q. Okay. Can you give me a little education on that, what type of policy that is, how it works, briefly?
A. I believe it was an Elite II. I said that pretty quick, but --
Q. That's all right.
36:1
A. Assuming that they had a homeowners association and not a condo association, it might have been a unit owners policy. Do you have that letter?
Q. Yes.
A. It's an Elite policy.
Q. Okay. Can you just tell me what typically would be covered in that type of policy?
A. It's an all-risk policy unless it's excluded specifically.
Q. What type of water loss would be covered in Mr. Hawkins'?

Annotations also display in the Annotations pane where they can be sorted and filtered. You can also view annotations in the Annotation Detail pane. See Viewing annotations and Filtering annotations.

⊟ Switch annotation modes to save time

TextMap offers three annotation modes to help you simplify the annotation process, depending on how you want to work. Each time you open a case in TextMap, the TextMap Default Annotation Mode dialog box displays, unless you select the Don't show again check box. You can change annotation modes at any time by clicking the Annotation menu and then clicking the desired mode. You can also click on the Annotations button on the Text & Video Tools Options ribbon or use the right-click menu. Manual Mode is the default annotation mode.

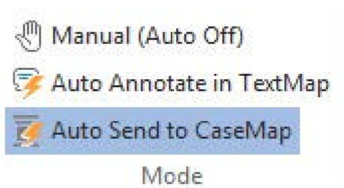
Annotation modes include:aw

- **Manual (Auto Off)** allows you to choose whether to apply the annotation in Annotate in TextMap or Auto Send to CaseMap mode.
- **Auto Annotate in TextMap** displays the New Annotation dialog box for entering notes or linking to issues or files before you choose to send the annotation as a new fact to CaseMap.
- **Auto Send to CaseMap** creates a new annotation and displays the Send to CaseMap dialog box, skipping the New Annotation dialog box.

To quickly determine what mode you are using, you can look at your mouse pointer indicator as you annotate text.

Annotation mode indicators include:

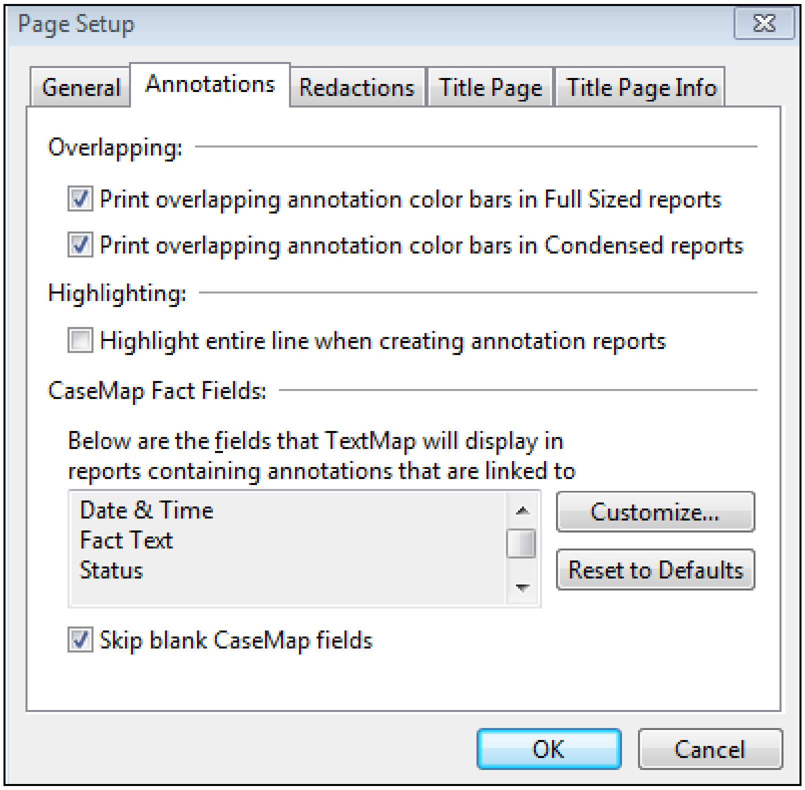
- **No Indicator** — Manual Mode
- **Text Balloon** — Auto Annotate in TextMap
- **Column** — Auto Annotate in CaseMap



⊟ Learn about annotations in reports

When printing reports, the annotation will reference the line(s) where the partial annotation is created in the transcript.

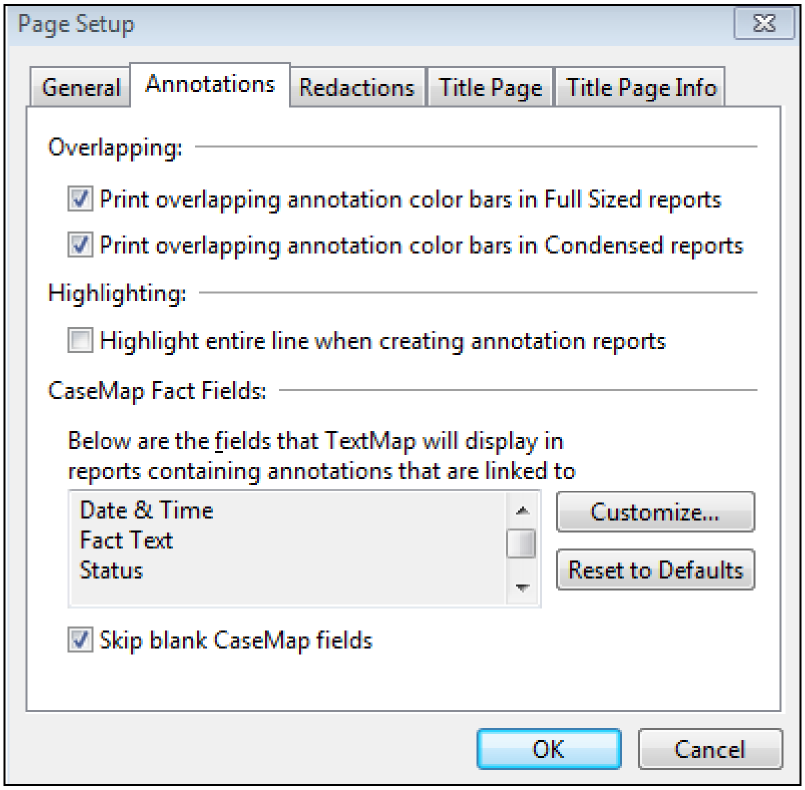
You also have the option to highlight the entire line in reports. Click **Print**, and then click **Page Setup**. Click the **Annotations** tab and in the **Highlighting** area, select the check box. This allows you to highlight the entire line when creating and printing annotation reports.



Learn about overlapping annotations in reports

Overlapping annotations bars print in full-size and condensed reports, single or multiple transcripts. In full-size reports, colored annotation bars display to the left of the transcript text up to one quarter of an inch or approximately six bars deep.

The overlapping annotation feature is turned on by default but can be turned off from the File menu by clicking **Print**, and then click **Page Setup**. Click the **Annotations** tab and clear the overlapping check boxes.



Related Topics

[About case issues](#)
[Creating case issues](#)
[Creating annotations](#)
[Viewing annotations](#)
[Changing page setup options](#)
[Sending annotations as Sanction media clips](#)

Creating annotations

Annotations are easily applied to transcripts simply by selecting the text you want highlighted. You can select and annotate the entire line in the transcript as well as select and annotate partial lines in the transcript. Annotating partial lines allows you to select the exact area of testimony as needed. See Changing page setup options for information on settings for highlighting the entire or partial line when printing annotation reports.

Annotated text displays in color on the transcript in the default color of yellow. If you want to add an annotation to text that is already highlighted, simply select text over an existing annotation and continue dragging your mouse pointer until you have all text you want highlighted. The overlapping annotation will display in yellow (by default) unless you choose to link it to another color-coded issue. Annotations linked to issues display the color of that issue code.

Overlapping annotations display colored, vertical bars to the left of the transcript text with each bar spanning the length of the selected text. Each issue color bar stacks beside the next so you can easily see where one annotation starts and the next one begins. Issue color bars for the newest created annotation will display to the right, closest to the transcript text.

You can point to the issue color bar to display any linked notes and annotations.

A paperclip icon displays in the left margin of the transcript to indicate that those annotations have a linked file associated with them.

Overlapping annotation bars can also be printed in both full-size and condensed reports, as well as single or multiple transcript and end note options. In reports, colored annotation bars display to the left of the transcript text up to 1/4 inch. This feature is turned on by default, but can turned off in the Annotations tab in the Page Setup dialog box.

If color annotations are too hard on your eyes during transcript review, you can hide the highlights during the review session. Issue color bars remain visible to easily identify where annotations occur in the transcript. Toggle this feature on or off from the View ribbon by clicking Highlight Annotations.

> If you color-code an issue black, the transcript text will appear as redacted in a printed hard copy. The text is still available for viewing in a PDF if the selection is copied to the Clipboard and pasted into another application for viewing.

To manually create annotations

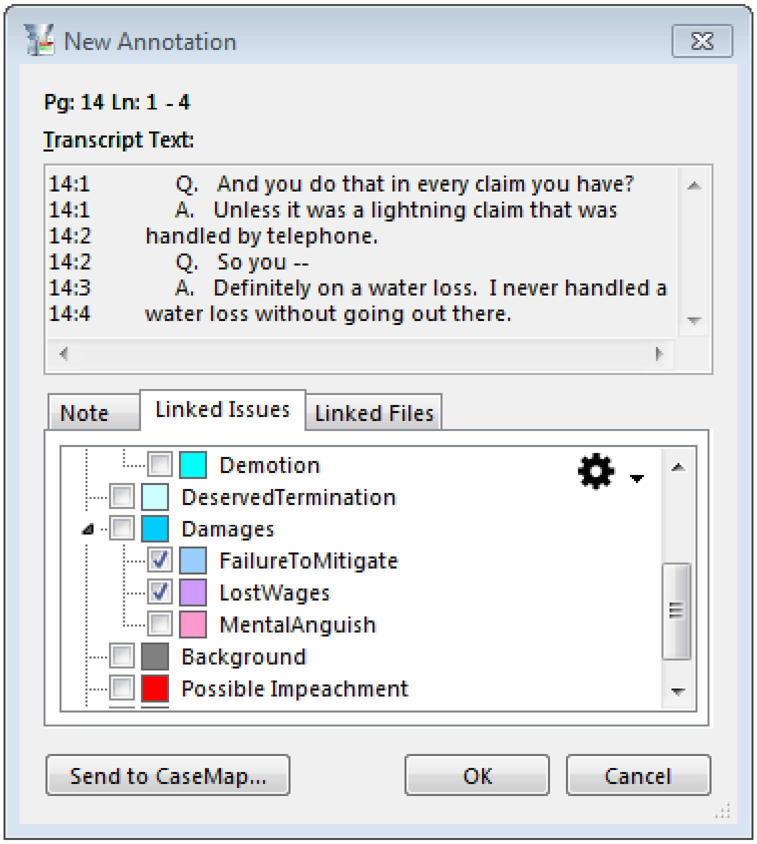
1. Perform any necessary searches needed to locate transcript text.
2. In the **TextMap** window, highlight the transcript section you want to annotate.
3. Right-click the selected text and click **Annotate in TextMap**.

   You can also click the **New Annotation** button located on the **Text & Video Tools** ribbon.

   The New Annotation dialog box opens.
4. On the **Note** tab, type in any notes you have regarding the annotated text.
5. Click **OK** when you are finished or click on a tab to link the annotation to case issues or document files.

To link annotations to case issues

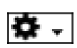
1. In the **New Annotation** dialog box, click the **Linked Issues** tab.



If you have closed this box, double-click on the annotation in the Annotations pane.

2. Select the issue check boxes for primary and sub-level issues you want to link to the annotation.

   The Linked Issues tab automatically displays the last issue selections to minimize issue selection when creating annotations.

   Click on the Issues Option button  to select one of the following:

   - Select All Issues to place a check mark beside all issues
   - Unselect All Issues to remove the check mark beside all selected issues
   - Manage Issues to open the Case Issues dialog box.

If an annotation is linked to more than one issue, the color of the issue that's the highest in the issue outline hierarchy (that is not the default color) will be applied to the annotation.

3. Click **OK** to save your selections.

   The selected issues now display in the Linked Issues column in the Annotations pane.

To link annotations to files

1. In the **New Annotation** dialog box, click the **Linked Issues** tab.

If you have closed this box, double-click on the annotation in the Annotations pane.

2. Click on the **Linked Files** tab, and then click the **Add** button.

3. On the **New Linked File Wizard's Welcome** page, click **Next**.

4. On the **New or Existing Document** page, choose whether to link to a new or existing document file.

   To link to a new document

   1. If you select **Yes, I want to link a new document to this case**, then the Document Type page displays.

   2. In the **Document Type** page, select the type of document for which you want to link: **File**, **Web Address**, **Document linked in CaseMap**, or **Custom Link**.

   3. Click **Next** to continue.

   4. On the **New Exhibit Path** page, click **Browse**.

   5. In the **Open** dialog box, navigate to the folder where the file is saved, select it and click **Open**.

   6. Click **Next** to continue to open the New Document Name page.

   7. In the **Name** field, type in or edit the document name.

   8. Under the question **Is this document an exhibit?**, click **Yes** or **No**.

   9. Click **Next** to continue.

   10. On the **Completing the New Linked File Wizard** page, review the selected file, then click **Finish**.

   To link to an existing document

   1. If you select **No, I want to link to an existing linked document**, then the **Select Document** page displays.

   2. In the **Select Exhibit** box, click on the file for which you want to link the annotation, then click **Next**.

   3. On the **Completing the New Linked File Wizard** page, review the selected file, then click **Finish**.

5. In the **New Annotation** dialog box, click **OK** to save your selections.

To view annotation update history

1. In the **New Annotation** dialog box, click the **Update History** tab.

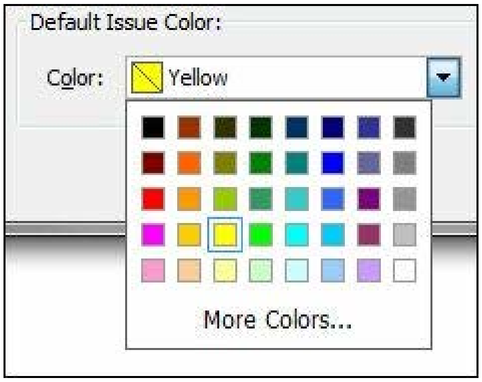
   If you have closed this box, double-click on the annotation in the Annotations pane.

   The tab lists who created the annotation and the date/time, as well as who updated the annotation and the date/time.

To change the annotation default color

The default annotation and case issue color are the same.

1. On the **File** menu, click **Case Setup** and then click **Case Issues.**
2. In the **Color** list, under **Default Issue Color**, click on the color you want.



3. Click **Close** to save your changes.

To turn off annotation highlights

On the **View** ribbon, click **Highlight Annotations** so that menu item displays as unchecked.

The Highlight Annotations feature is enabled when a check mark displays next to the menu option and is automatically turned on by default. The setting change only applies to the current TextMap session. The next time you open a case in TextMap, the annotation color highlights will display.

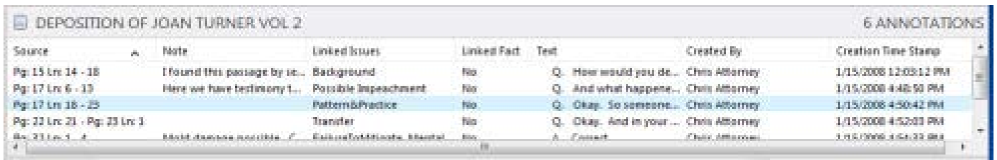
Related Topics

About annotations
Viewing annotations
Filtering annotations
Editing annotations
Moving annotations
Changing annotation owner status
Deleting annotations

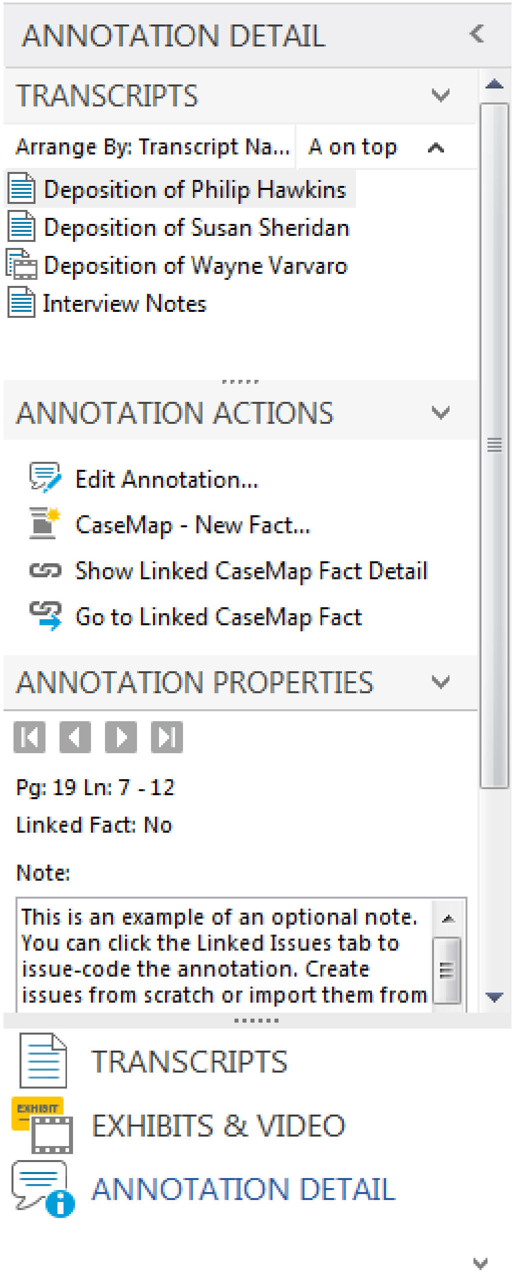
Viewing annotations

Annotations displays in the Annotations pane directly above the TextMap window where transcripts are viewed. For each annotation in the Annotation list, the page/line number, any notes, linked case issues, whether it was sent as a new fact to a corresponding CaseMap case, the annotated text, who created it and the time stamp is displayed.

The Annotations pane also displays a count and filter status in the top right corner allowing you to see at a glance how many annotations exist for the current transcript and whether a filter is running. The count and filter status immediately update as you view different transcripts, run or cancel filters, and add or delete annotations.



The Annotation Detail pane allows you to view the full note and all linked case issues. By using the navigation icons you can quickly navigate through all annotations in the selected transcript. An Annotation Actions pane contains links for editing annotations and quickly accessing the corresponding fact record in CaseMap. See annotation details below.



To navigate annotations

You can navigate a transcript's annotations in multiple ways:

- Click on an annotation to view, and then on the Create & Edit ribbon, click on the Navigation Annotation icons to navigate through all annotations in a selected transcript.
- In the Annotations pane, click on an annotation to view the applied annotation in the transcript.
- In the Annotation Detail pane, click on the navigation icons

to navigate through all annotations in a selected transcript and view the applied annotation in the transcript. With the Annotation Detail pane open, you can also view the full note and all linked issues. See annotation details.

⊟ To view annotation details

1. In the **Transcripts** pane, click on the transcript you want to review.
2. In the **Annotations** pane, click on the annotation for which you want to view details.
3. In the **Navigation** pane, click on the **Annotation Detail** button.

   The Annotation Detail pane displays in the Navigation pane.
4. In the Annotation Properties pane, click on the applicable navigation icon(s)

   to navigate through all annotations in the selected transcript.
5. In the **Annotations Actions** pane, click on a link for the action you want.
   - **Edit Annotation** displays the Edit Annotation dialog box, where you can view notes or link to a case issue or file.
   - **CaseMap - New Fact** launches the Send to CaseMap tool, sending the selected annotation as a new fact to a corresponding CaseMap case. The new fact record in the CaseMap Facts spreadsheet will have a link to the current annotation in the TextMap case. By default, the text and page/line information is sent. The annotation will indicate Yes for the Linked Fact column in the Annotations pane and the Linked Fact section in the Annotation Properties task pane in the Annotation Detail pane.
   - **Show Linked CaseMap Fact Detail** displays the Fact Detail dialog box containing information about the fact linked to the selected annotation. You can edit this information and update the CaseMap case by clicking OK.
   - **Go to Linked CaseMap Fact** displays the CaseMap case in front of TextMap and selects the fact record linked to the selected annotation.
6. In the **Annotation Properties** pane, review the page/line reference number, whether the annotation is linked to a fact record in the corresponding CaseMap case, review the full annotation note, and review any linked case issues.

Related Topics

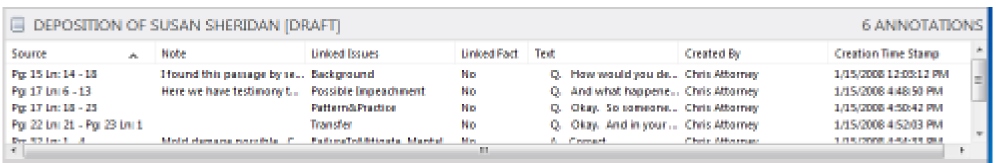
About annotations
Creating annotations
Filtering annotations
Editing annotations

Sorting annotations

The Annotations pane allows you to sort annotations by columns: Source, Note, Linked Issues, Linked Fact, Text, Created By, and Creation Time Stamp. The default sort order is by page/line number.

To sort annotations

1. In the **Transcripts** pane, click on the transcript for which you want to view annotations.
2. In the **Annotations** pane, click on the column you want to sort by.



For example, if you want to sort all annotations by linked issues, click on the Linked Issues column.

All annotations now display by linked issues and in alphabetical order. An arrow displays in the column indicating which column annotations are sorted by.

Related Topics

- About sorting
- About filtering
- Viewing annotations
- Filtering annotations

Filtering annotations

TextMap now allows you to filter annotations by creator or linked issues. To apply an annotation filter, click the View ribbon and select Filter by Creator or Filter by Linked Issues. (No Filter is the default view, where all annotations display). The selected filter is then applied to all transcripts in the case for the current user session or until another filter option is selected. When you close or re-open a case, any previously applied filters are automatically cleared. The annotation filter status displays in the top right corner of the Annotations pane.

> If you or another user deletes an annotation or issue while a filter is applied, it will be deleted regardless.

View filtering considerations

Reference the following table to learn about considerations that affect filtering.

Filtering Considerations	
Filters	**Description**
Filter by Creator	Any new annotations added by other case users when the filter is running only display if they match the current filter.
	If there are no annotations for selected users, the Annotations pane displays a message, Filter Excludes All Annotations.
	Case users who have been deleted will still display with that designation. If an annotation has "unknown" as the creator, you can assign it to another users. See Changing annotations' owner status.
	If the Filter by Creator menu item is grayed out, the case does not currently have any users.
Filter by Linked Issues	Annotations created or edited when the filter is running only display if they match the current filter.
	If you select a parent issue, all child issues are also selected. Clear the check box for any issue you do not want in the filter.
	If an issue filter is already applied, those issues will already be selected in the Filter Annotations by Linked Issues dialog box.
	If there are no annotations for selected issues, the Annotations pane displays a message, Filter Excludes All Annotations, and the Filter by Annotations by Linked Issues dialog box displays a message, There are no issues in this TextMap case.

To filter by creator

1. On the **View** ribbon, click **Filter by Creator** on the **Filter Annotations** tab.

2. In the **Filter Annotations by Creator** dialog box, select one or more users to filter by.

3. Click **OK** to apply the filter.

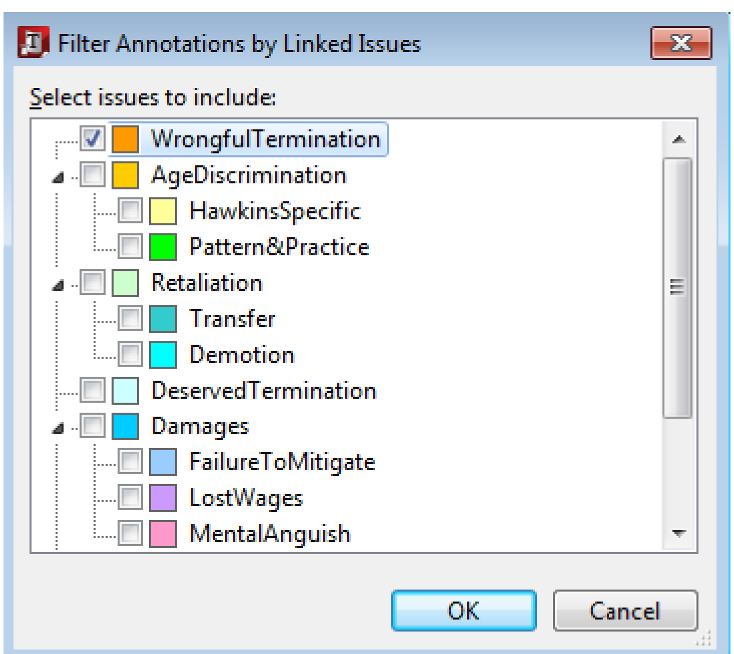
   Only annotations by selected users now display in the Annotations pane.

   The information bar in the top right corner of the Annotations pane now displays the number of annotations filtered and total annotations in the transcript.

To filter by linked issues

1. On the **View** ribbon, click **Filter by Linked Issues** on the **Filter Annotations** tab.
2. In the **Filter Annotations by Linked Issues** dialog box, select the check box for each issue you want included in the filter, then click **OK**.

   You can also right-click to check or clear all issues.



Only annotations linked to the selected issues now display in the Annotations pane.

To clear an annotation filter

1. On the **View** menu, click **No Filter** on the **Filter Annotations** tab.

   The previous filter is now removed from all transcripts in the case.

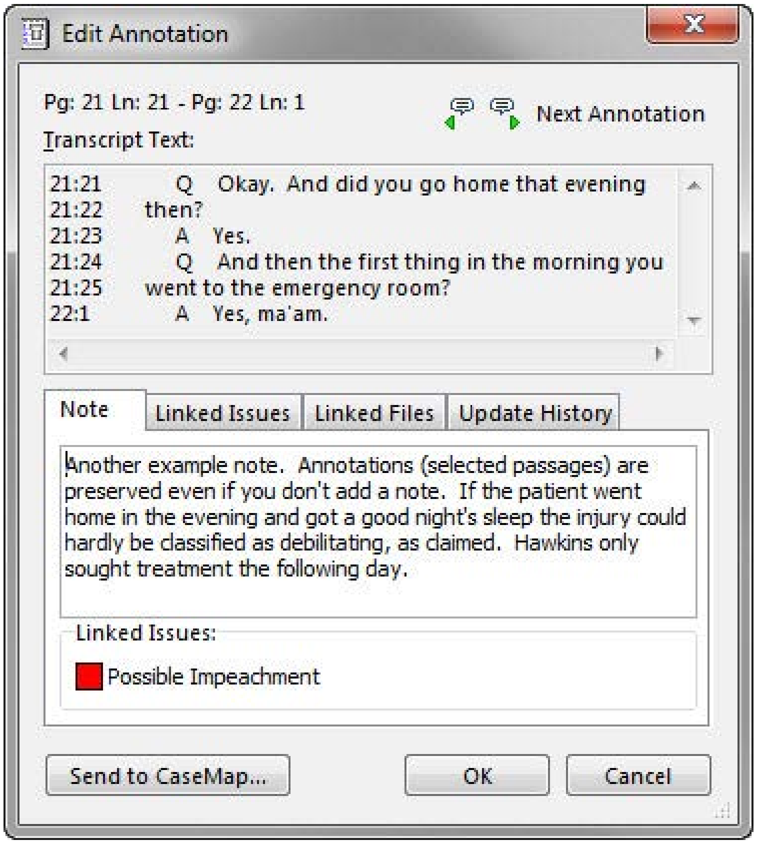
   If you select another filter option, the previous filter is cleared and the new filter is applied.

Related Topics

About annotations
Creating annotations
Viewing annotations
Sorting annotations

Editing annotations

Annotations edits can made be in the Edit Annotations dialog box. You can edit notes, linked issues and files, and view update history. Click OK to save any changes.



You can access the Edit Annotation dialog box five ways:

- Double-click the annotation in the Annotations pane.
- Right-clicking an annotation in the Annotations pane or in the transcript and then click Edit Annotation.
- Click the Edit Annotation link in the Annotation Detail pane under Annotation Actions.
- Click the issue color bar in the Transcript window.
- Select the annotation in the Transcript window and click Edit Annotation on the Create & Edit tab located on the Text & Video Tools ribbon.

Related Topics

[About annotations]
[Creating annotations]
[Moving annotations]

Changing annotation owners

The Change Annotations' Owner wizard allows you to change the creator or owner of an annotation from one case user to another. This feature is helpful when a staff member is no longer working on the case or you have new a staff member and need to re-assign an annotation to new owner. It's also beneficial when you have imported new transcripts that display a Created By status of "unknown" in the Annotations pane. You can then assign the annotation to a case user for tracking purposes.

When you change the annotation owner status, the change affects the whole transcript. You cannot change the owner status for individual annotations within a transcript.

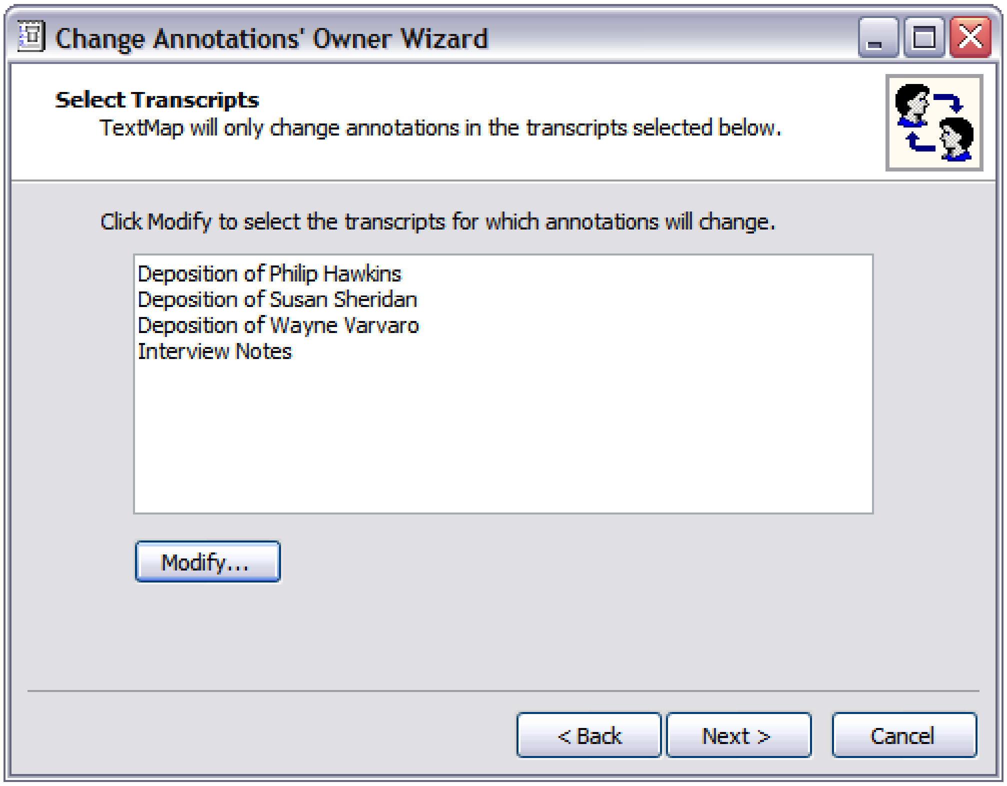
To change an annotation owner to another user

1. On the **Case Tools** ribbon, click **Change Annotations Owner**.

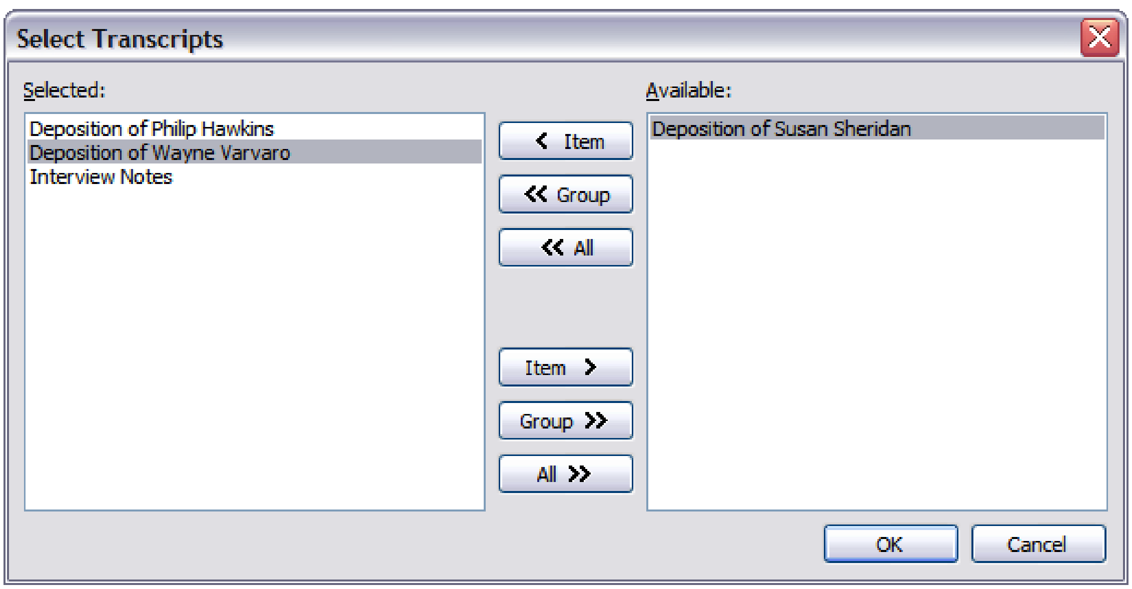
   If this menu item is grayed out, you do not have permission to change annotation owner status or there are no users in the case.

2. When the wizard launches, click **Next**.

3. On the **Select Transcripts** page, select the transcripts that include annotations you want to change.



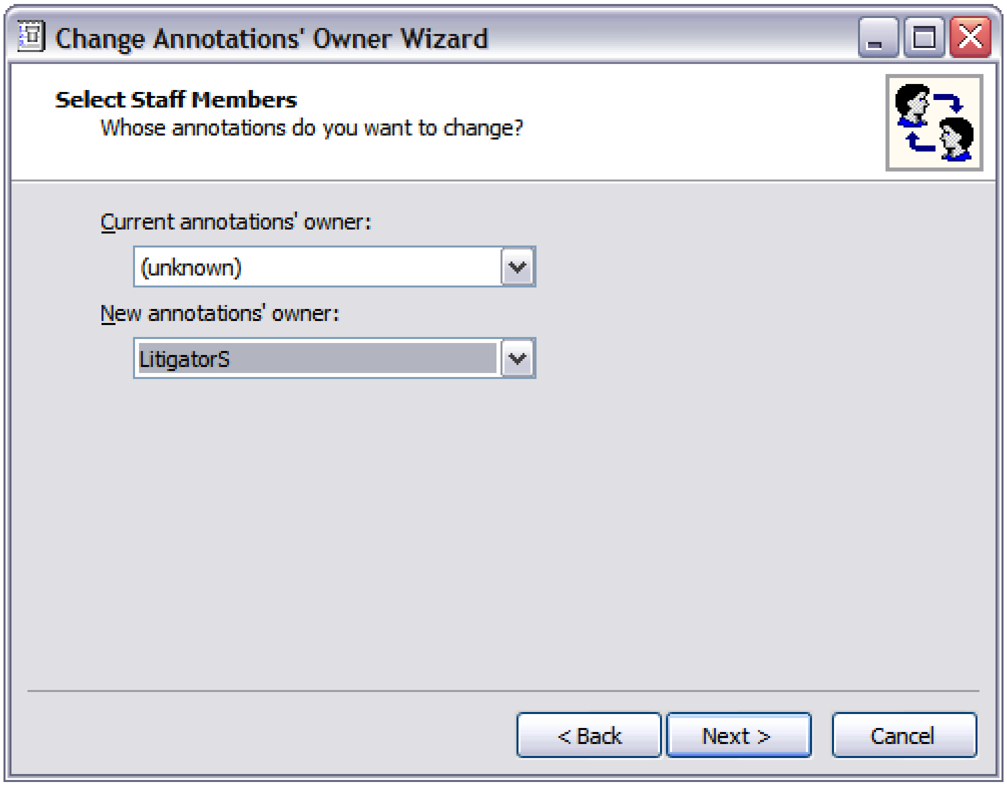
4. Click the **Modify** button to select the transcripts for which annotations will change.



In the Select Transcripts dialog box, select the transcripts in the Available box that you want to add or select transcripts in the Selected box that you want to remove.

Use the Item button to move the transcripts accordingly, then click OK.

5. Click **Next** to open the **Select Staff Members** page.

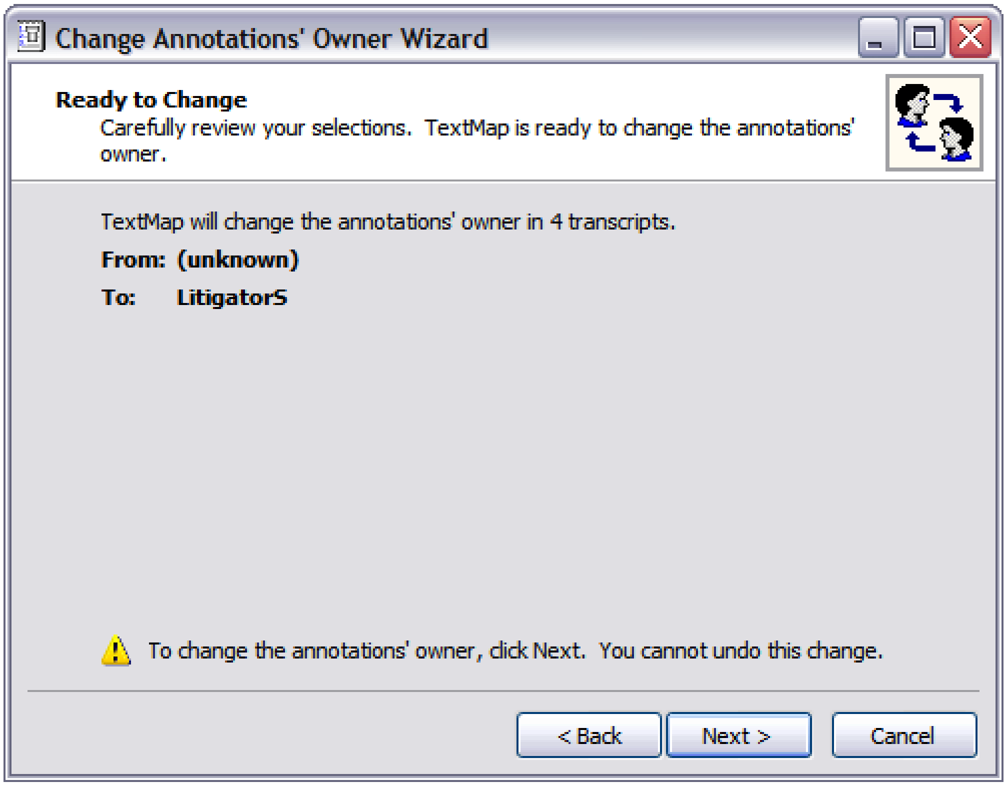


6. In the **Current annotations' owner** list, click the name of the person that created the annotation.

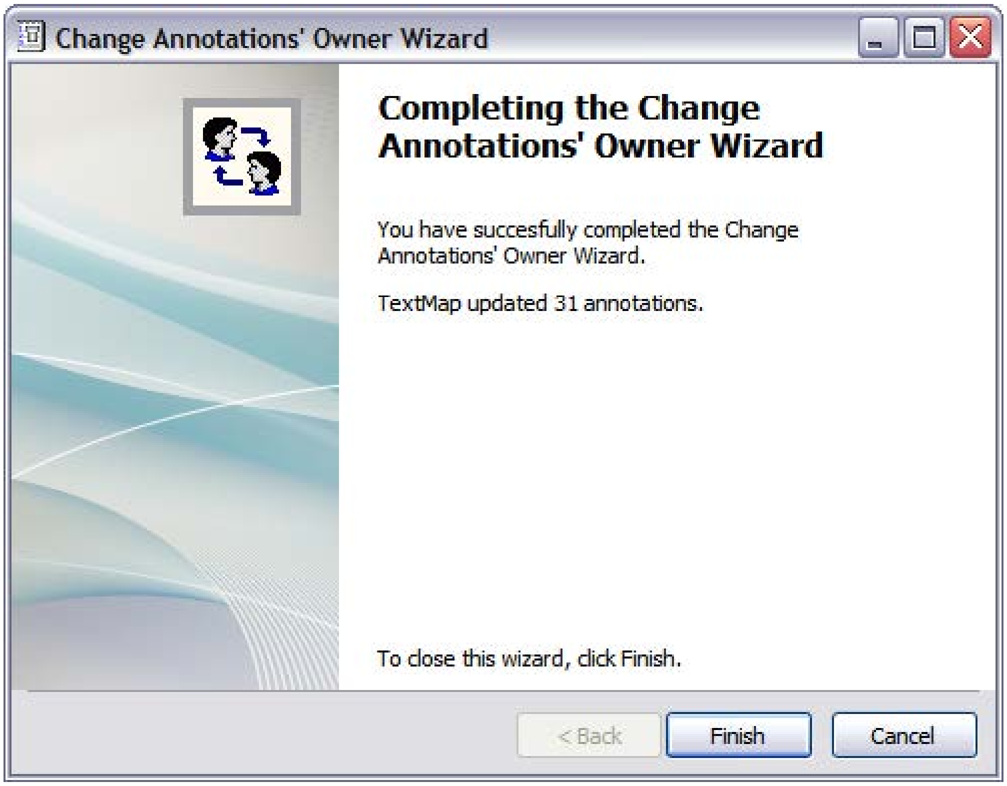
7. In the **New annotations' owner** list, click the name of the user you want to assign the annotation to.

8. Click **Next** to continue.

9. On the **Ready to Change** page, review your annotation owner change selections and how many transcripts are affected, then click **Next**.



10. On the **Completing the Change Annotations' Owner Wizard** page, review how many annotations were updated, then click **Finish**.



The annotation owner is now updated in the Created By column in the Annotations pane.

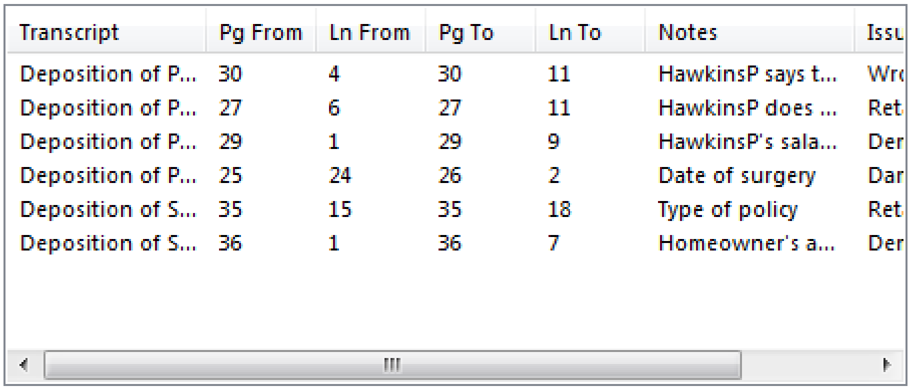
Related Topics

[Creating annotations](#)
[Editing annotations](#)

Importing annotations

The Import Annotations Wizard allows you to import annotations from a comma delimited text file (.csv) file saved from a Microsoft® Excel spreadsheet without having to do it manually. The Import Annotations Wizard can import multiple annotations into multiple, existing transcripts. The wizard imports page/line number and note designations, and allows the ability to link issues to imported annotations so they can be tagged.

In order to successfully import annotations, the .csv file's columns must be in the following, specified order: Transcript Name, Page From, Line From, Page To, and Line To. The file may also include the Notes and Issues column (optional). This list of issues should be separated by semicolons. The wizard's Welcome page includes a link to view a sample import file (shown below).



Transcript	Pg From	Ln From	Pg To	Ln To	Notes	Issu
Deposition of P...	30	4	30	11	HawkinsP says t...	Wr
Deposition of P...	27	6	27	11	HawkinsP does ...	Ret
Deposition of P...	29	1	29	9	HawkinsP's sala...	Der
Deposition of P...	25	24	26	2	Date of surgery	Dar
Deposition of S...	35	15	35	18	Type of policy	Ret
Deposition of S...	36	1	36	7	Homeowner's a...	Der

If you import the same .csv file twice, you will duplicate content in the case. The Import Annotations Wizard will display an Import Errors page if some annotations fail to import. We recommend that you save this information to a file, resolve the errors, and then import the skipped annotations as a separate .csv file.

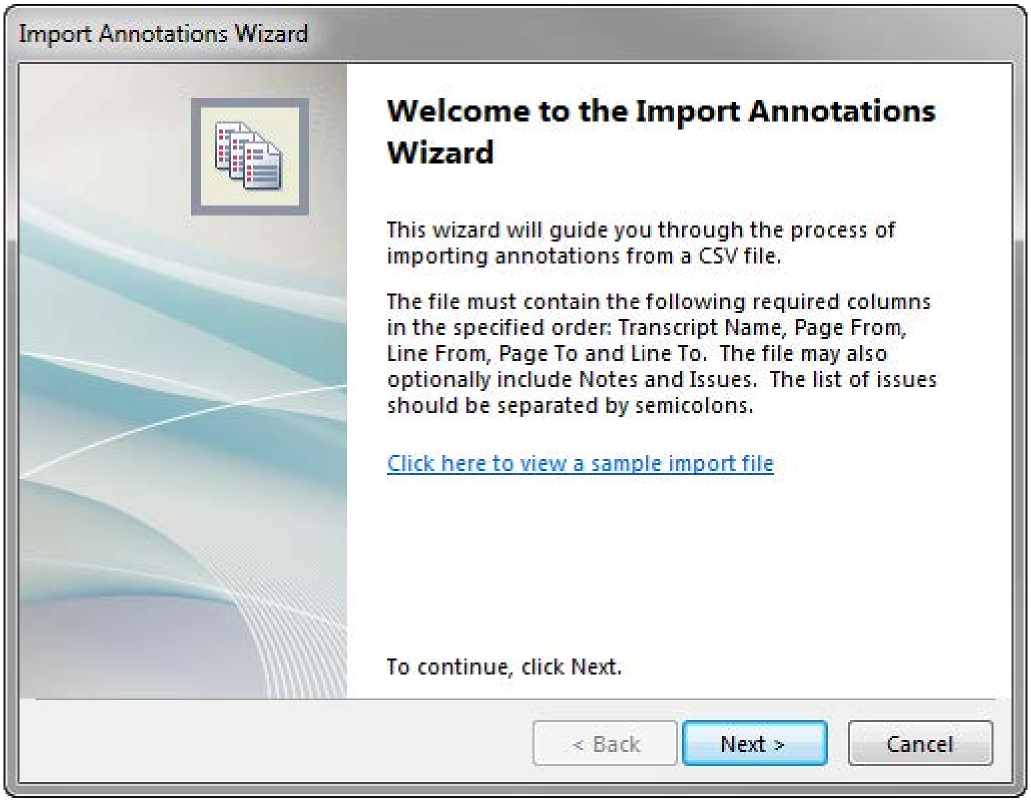
If an annotation in has "Unknown" listed in the Created By column, it may be an imported annotation. These annotations can be assigned to a case user after the import. See Changing annotation owner status.

To import annotations into existing transcripts

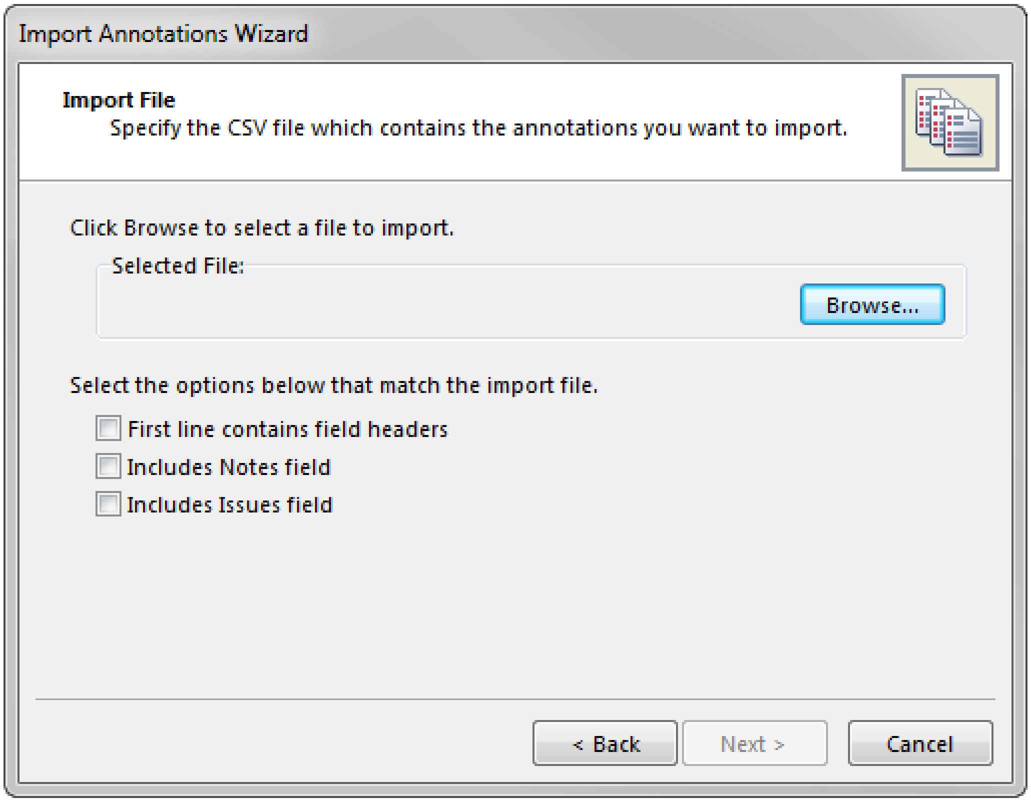
1. On the **Home** ribbon, click **More Import**, and then click **Import Annotations**.

   You can also click Import on the File menu, and then click Import Annotations.

2. When the wizard launches, click **Next**.



3. On the **Import File** page, click **Browse** to locate the file you want to import.



4. After the selected file and path of the file(s) being imported is displayed in the wizard, select/deselect all applicable options (e.g., First line contains field headers), to indicate what (i.e., notes, issues) is in the file(s) being imported):

   First line contains field headers -- The first line of the import file contains the field headers (i.e., Transcript, Pg From, Ln From, etc.) and not the first annotation.

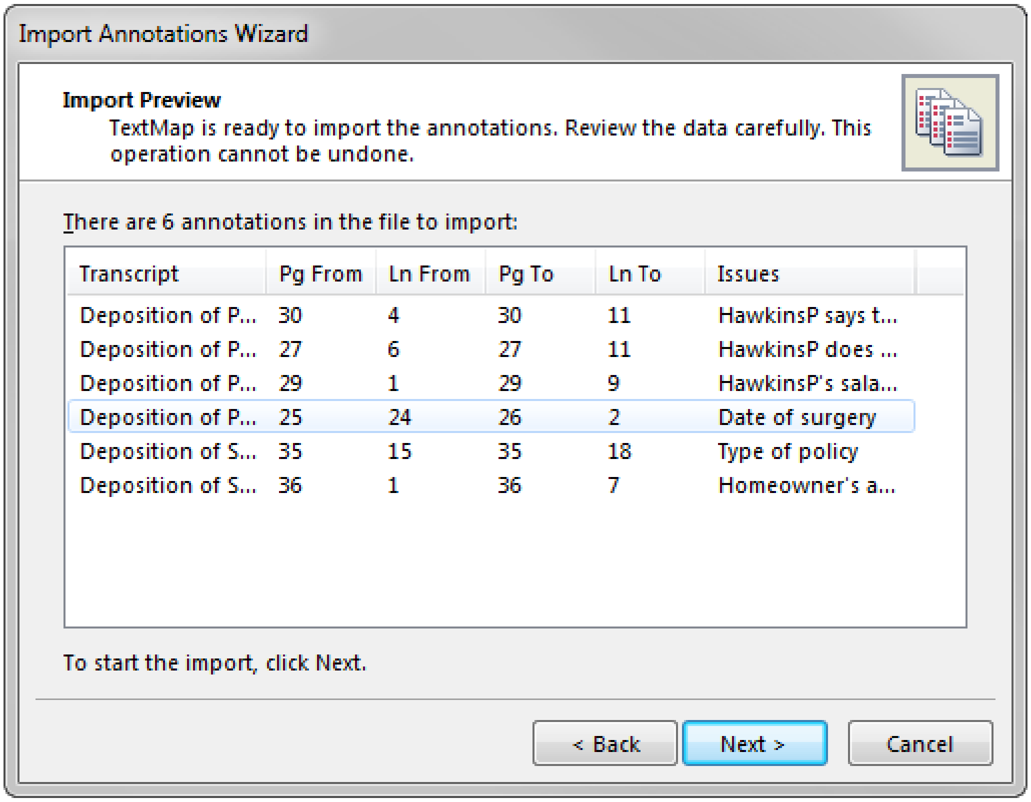
   Includes Notes field -- Import file includes a field to list the note(s) associated with each annotation.

   Includes Issues field -- Import file includes a field to list the issue(s) associated with each annotation.

These options must match what is in the import file in order for the annotations to import correctly. If a check box (e.g., Issues or Notes) is not selected, it will not be displayed in the Import Preview window.

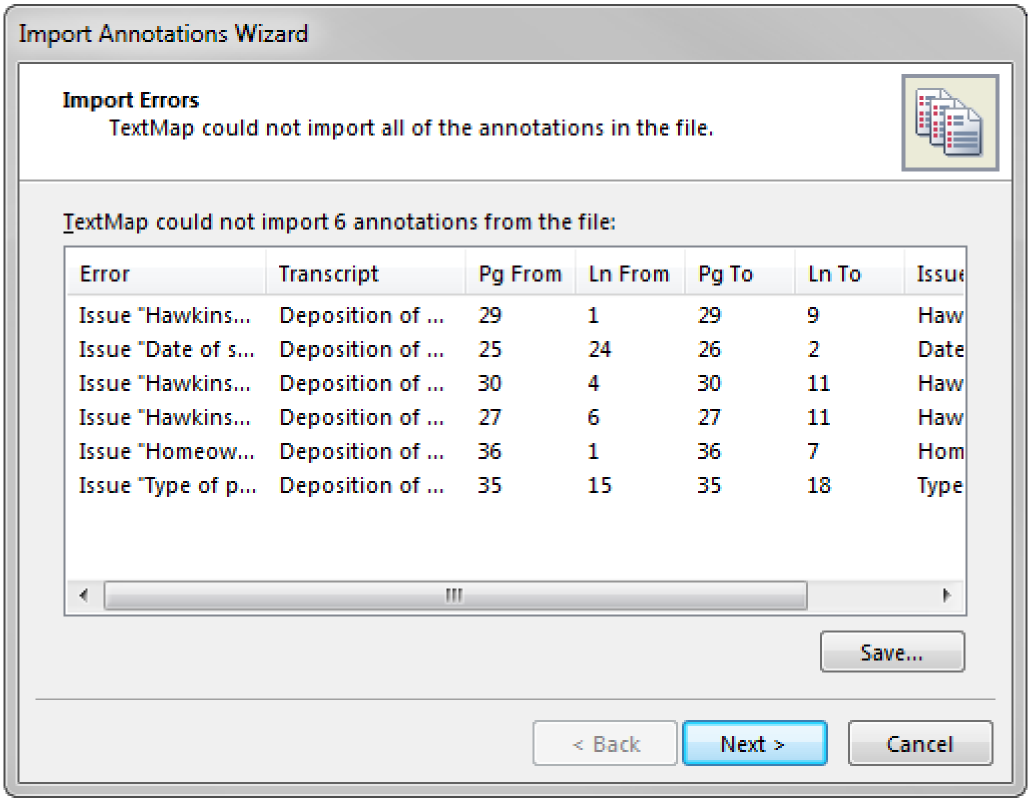
5. Click **Next** to display the Import Preview page.

6. On the **Import Preview** page, review the annotations selected for import, then click **Next** to start the import process.



Since the Include Notes field option was not selected in Step 4, only Issues are displayed in the Import Preview window.

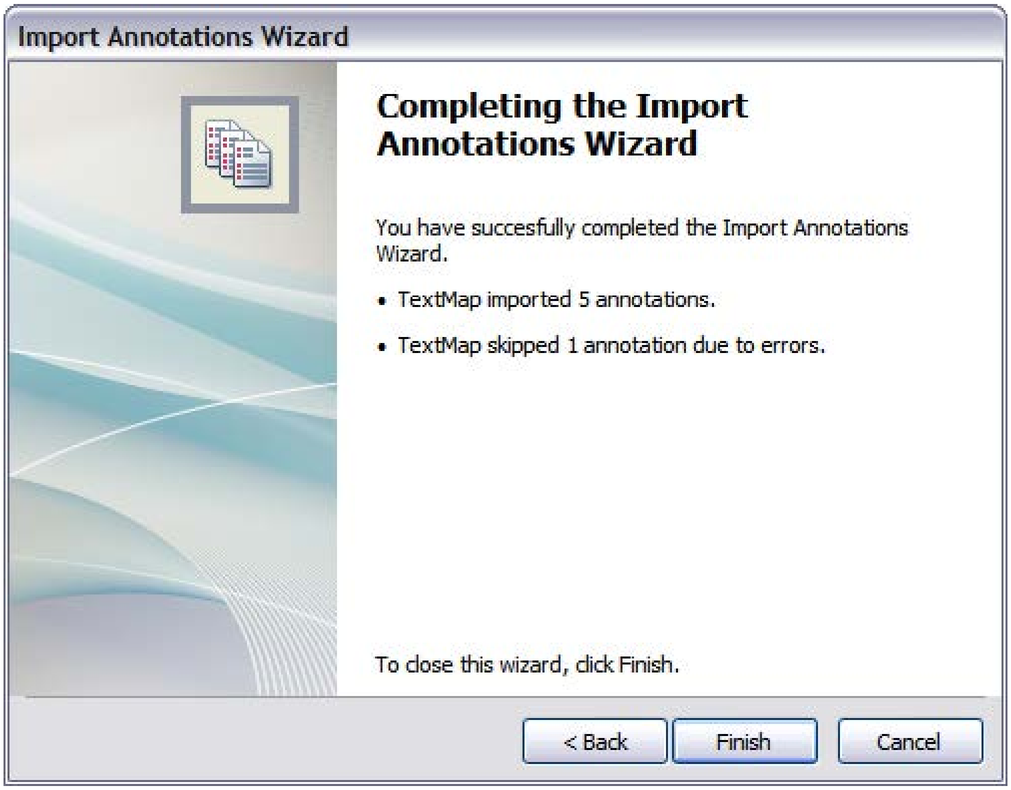
If any annotations cannot be imported (e.g., transcripts with the same name), the wizard displays an Import Errors page listing all annotations that did not successfully import.



7. Optional: Click the **Save** button to save a list of the import error list for future reference.

8. Click **Next** to continue.

9. On the **Completing the Import Annotations Wizard** page, review the number of imported annotations and those skipped due to errors, then click **Finish**.



The imported annotations now display in the Annotations pane. When you click on an annotation in the Annotations pane, the transcript displays the annotated content with the applicable issue code color, if issues were included were included in the .csv file.

Related Topics

About annotations
Creating annotations

Printing annotation reports

You can create annotation reports from single or multiple transcripts' annotations. Or you can print Annotation Digest ReportBooks, which include the annotations and notes from a set of ReportBooks that can be filtered by issue. Using the Annotation Digest Wizard, you can also customize the order of annotations and decide whether to include linked CaseMap facts.

For more information, see the following topics:

- Printing single transcripts
- Printing multiple transcripts

- [Printing Annotation Digests]

Related Topics

[About annotations]
[Creating annotations]
[Viewing annotations]

Moving annotations

If an annotation was not applied properly, you can simply move it to the right page/line location in the transcript.

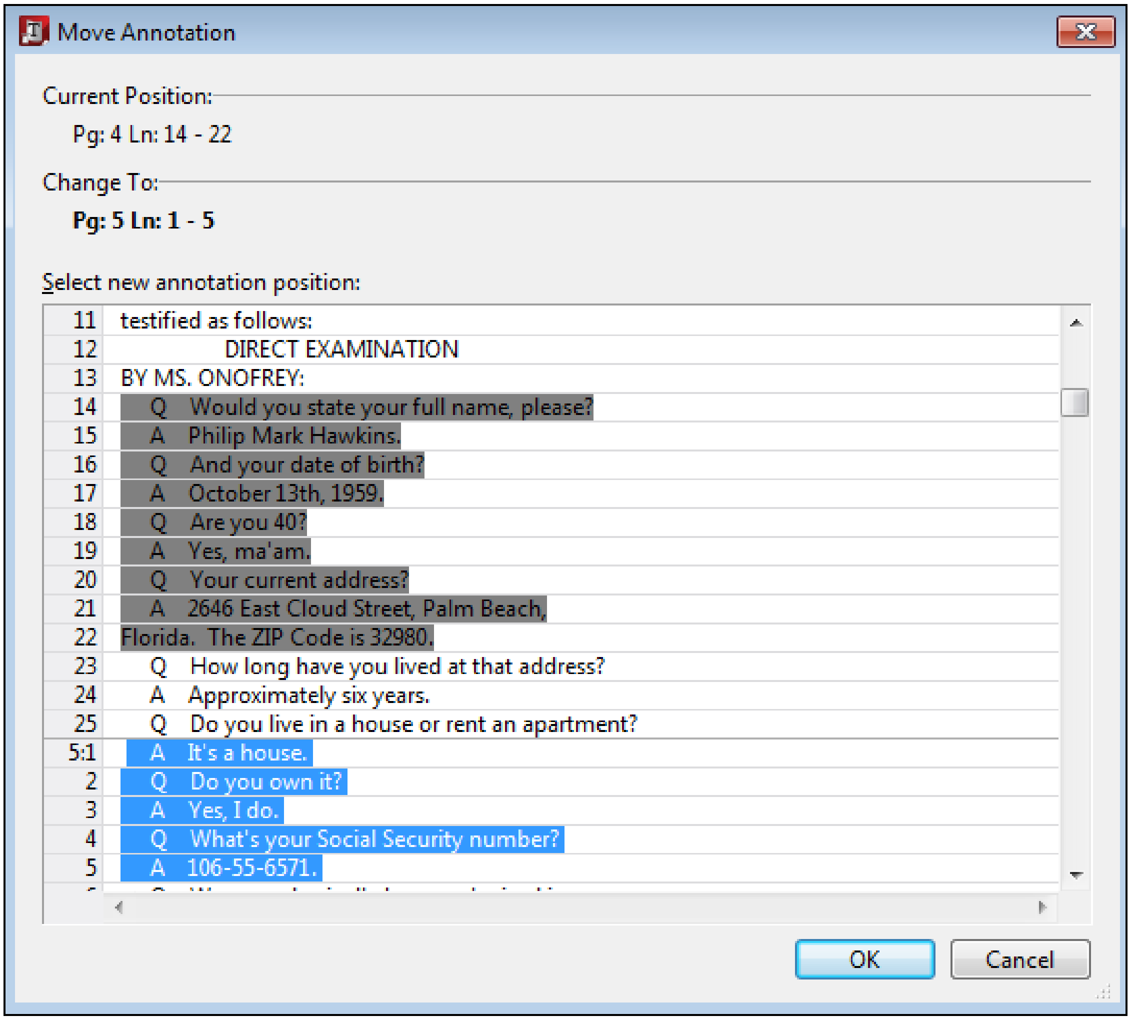
The issue color bar will display in the new location.

To move an annotation

1. In the **Transcripts** pane, click on the transcript for which you want to view annotations.
2. In the **Annotations** pane, right-click on the annotation you want to move.
3. On the sub-menu, click **Move Annotation**.

   You can also click the 

 button located on the **Text & Video Tools** ribbon.
4. In the **Move Annotation** dialog, select the new text for annotation.



5. Click **OK** to move the annotation.

Related Topics

[Creating annotations](#)
[Editing annotations](#)

Deleting annotations

Once an annotation is deleted from a transcript, it is permanently removed from the case. Removing annotations from TextMap does not delete any corresponding fact records in CaseMap.

To delete a single annotation

1. In the **Annotations** pane, click on the annotation(s) you want to delete.

   Press the Shift key while clicking the annotations to select more than one.

2. Right-click the annotation and then click **Delete Annotation**.

   You can also click the annotation in the transcript, click **Delete** in the **Text & Video Tools** ribbon, and then click **Delete Annotation**.

3. In the message box, click **Yes**.

   All annotations are permanently deleted from the transcript.

To delete all annotations in a transcript

1. Click **Delete** in the **Text & Video Tools** ribbon, and then click **Delete All Annotations**.

2. In the message box, click **Yes**.

   All annotations are permanently deleted from the transcript.

Related Topics

Creating annotations
Editing annotations
About the case index

Sending facts to CaseMap

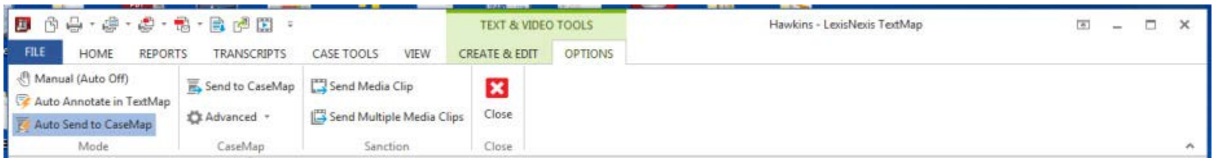
Sending facts to CaseMap

We encourage you to use CaseMap from the first day you begin working on a new matter. When you use CaseMap in conjunction with TextMap, you can enter new facts well in advance of having court-appropriate sources for these fact records. And you can always update the existing fact records while working in TextMap. Later, when you find a source for a given fact as you review a transcript, you can update the pre-existing fact.

TextMap is designed so you can optionally perform all basic data entry about a fact in the midst of sending a transcript passage to CaseMap. These options are available in the dialog boxes that display when you send a new fact to CaseMap or update an existing one. For each transcript passage sent to CaseMap, TextMap automatically creates a source that references the transcript and the page and line numbers of the selection. You must have the related CaseMap case already open in order to send transcript annotations from TextMap to CaseMap.

You can tell which annotations have already been sent to CaseMap by checking the Annotations pane at the top of the page. The Linked Fact column has a Yes/No status indicator for each annotation. Annotations with a Yes have been sent to CaseMap. The CaseMap fact automatically links back to the selected passage in the transcript. If the fact has already been sent a message displays asking if you want to re-send the annotation (it replaces the link to the existing fact).

If you intend to send multiple annotations to CaseMap, consider switching to the Auto Send to CaseMap annotation mode. Click the arrow next to the Annotate in TextMap button or click the Annotations menu, and then click Auto Send to CaseMap. Each time you annotate transcript text the Send to CaseMap dialog box automatically launches, skipping the New Annotation dialog box.



If your organization uses CaseMap, follow those established guidelines for creating short names in CaseMap. If you do not understand the concept of short names, please refer to the CaseMap Answer Center.

Once you have sent annotations to CaseMap, you can use options on the Annotations menu to instantly jump to a selected annotation's associated fact in CaseMap or display a Fact Detail window with information about the associated fact. Right-clicking an annotation in the Annotations pane opens a shortcut menu with the same CaseMap-related options.

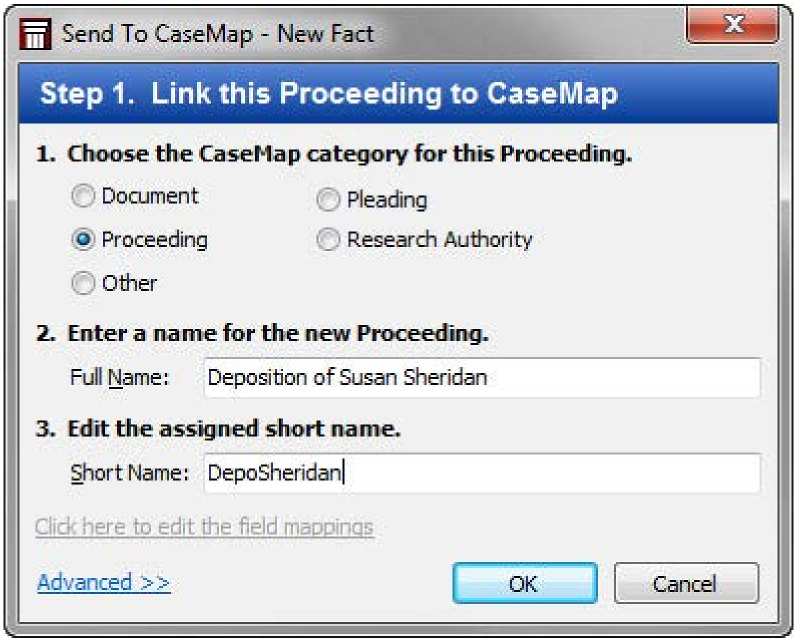
Some organizations install program files on servers, along with the case files. If your organization installs CaseMap and TextMap on a server, these programs must be installed on the same server in order for the links to hold. Additionally, if you move a TextMap case file that contains links to a CaseMap case, you could break the link to the CaseMap record. See Moving cases and Managing/changing file locations topic to plan the case file move beforehand.

To send annotations to CaseMap

1. In **CaseMap**, open the corresponding case.
2. In **TextMap**, select the transcript text you want to send as a new fact to CaseMap.
3. Select/highlight the annotations to be sent to CaseMap, and on the **Text & Video** ribbon, click the **Options** tab.
4. On the **Options** tab, click **Send to CaseMap**.

   You can also right-click on the selected text and click **Send To**, and then click **CaseMap - New Fact**.

   The Send to CaseMap - New Fact dialog box displays.
5. In the **Step 1. Link this Proceeding to CaseMap** dialog box, review the information that is automatically filled in for you, and then click **OK**.

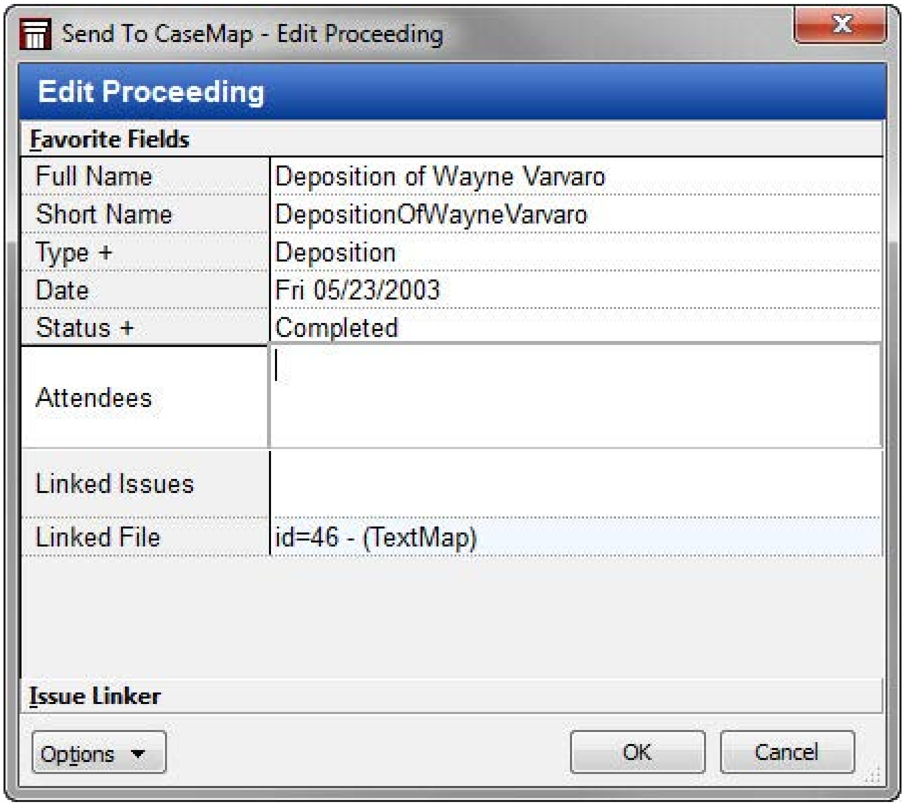


Notice that the transcript content displays in the Text Selection box. Do not delete these brackets as they help link it to the source file. Fact Text is also selected in the Append Text Selection to list and the deposition is listed in the Source(s) field. Any annotation notes display in the Fact Text field.

If you have already sent an annotation from this transcript to CaseMap, the Step 1. Link this Proceeding to CaseMap dialog box does not display.

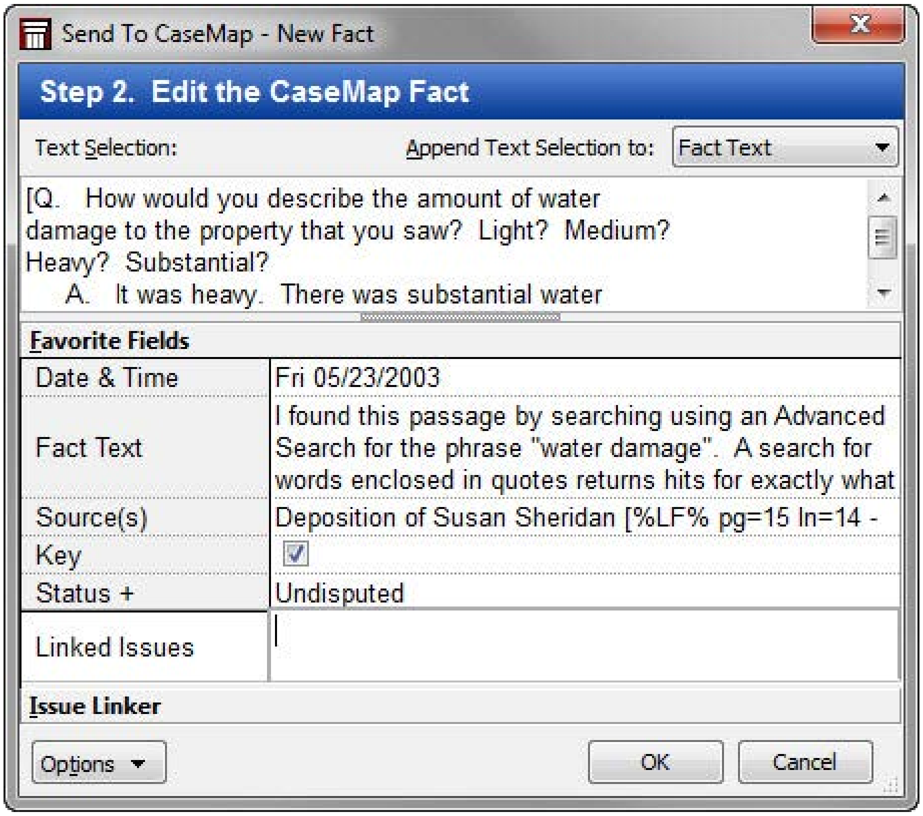
You can also send note text to CaseMap after an annotation is already sent. Notes are added to the Fact Text field as mentioned above. If you add more than one note to an annotation, the annotation and its new note are added to the Facts spreadsheet as a new fact record.

5. Click the **Advanced** link if you also want to add the transcript as an object in CaseMap's All Objects and Proceedings spreadsheets.



Click the Save & Edit button to open the Edit Proceeding dialog box and enter additional information about the new object record, such as the type and status of the document, and any attendees present.

6. In the **Step 2 Edit the CaseMap Fact** dialog box, review the information that is automatically filled in for you.



Notice that the transcript content displays in the Text Selection box. Do not delete these brackets as they help link it to the source file.

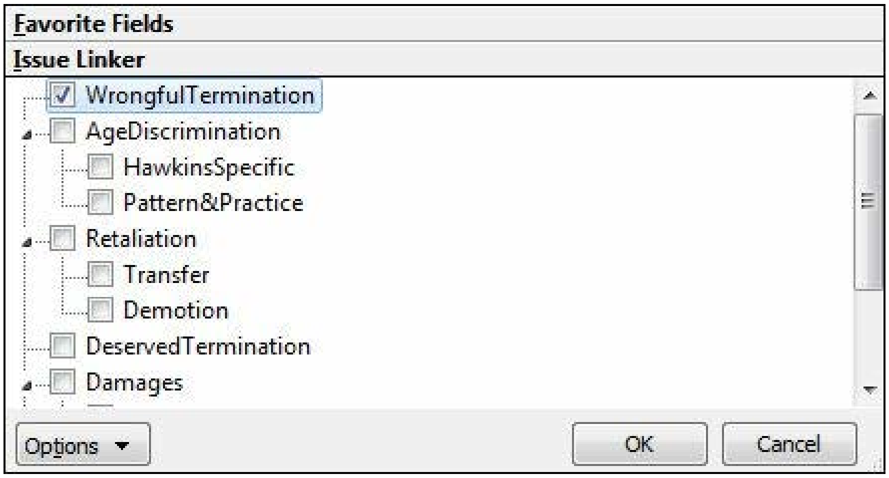
Also notice that the Append Text Select to box automatically lists the Fact Text field. You can select other columns on the spreadsheet to receive the text or click "Do Not Append" if you're entering a summary of the fact and simply want to refer back to the actual text when necessary.

Annotation notes display in the Fact Text box and will display in the Fact Text field in the Facts spreadsheet directly under the annotated text in brackets. You can turn this option off from the Tools menu by clicking Options and then clicking the Annotation tab. Next clear the Use Annotation Note for new Fact Text check box.

The deposition is listed in the Source(s) field.

7. Enter additional information about the new fact record, such as the date and time, whether the information is a key fact, and its current status.

8. Click the **Issue Linker** bar to link to case issues in the CaseMap case.

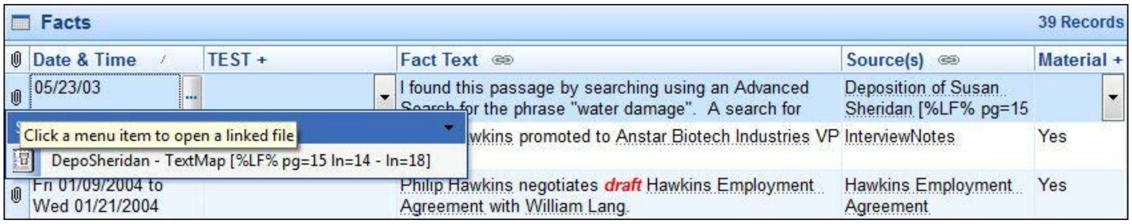


9. Click **OK** to continue.

10. In the message box, click **Yes** to view the new fact record in CaseMap.

11. In **CaseMap**, locate the new, highlighted fact record in the **Facts** spreadsheet.

12. In the **Facts** spreadsheet, click the **Paperclip** icon for the new fact record to view the linked path to the transcript in TextMap.



13. Click the file path to review the TextMap transcript.

    In TextMap, the transcript opens to the page/line number of the annotation.

14. In the **Annotations** pane, notice that the **Linked** Fact column now contains **Yes**, indicating that the excerpt is a linked fact in CaseMap.

To remove an annotation's fact link

You can remove annotation links to fact records in CaseMap. Annotations in the transcript will remain. Deleting the links in TextMap does not delete the fact records in the CaseMap case.

1. Select the annotation(s) in the transcript or in the Annotations pane.

2. Click **Options** on the **Text & Video Tools Options** ribbon, and then click **Advanced.**

3. On the submenu, click **Remove Fact Link**.

4. In the message to remove the CaseMap link, click **Yes**.

Related Topics

About annotations
Creating annotations
Updating existing facts in CaseMap

Updating existing facts in CaseMap

Once annotations have been sent as new facts to CaseMap, you can still update these existing fact records while working in TextMap. For example, when reviewing a transcript you might locate the source for the fact you already sent to CaseMap. You can easily update the fact record with this information.

You must have the related CaseMap case already open in order to update existing fact records in CaseMap. You must also select the fact record that you want to update.

To update existing fact records in CaseMap

1. In **CaseMap**, open the corresponding case for which you want to update fact text.

2. On the **CaseMap Facts** spreadsheet, select the fact record for which you want to add an additional source.

3. In **TextMap**, select the case transcript you are working with by clicking its name in the **Transcripts** list.

   The transcript text you want to send to CaseMap must first be an annotation in TextMap. If it is not annotated text, highlight the transcript text and then right-click on it and click Annotate in TextMap. You can type in a note or link to case issues too. Click OK to save the annotation. See Creating annotations.

4. Click **Options** on the **Text & Video Tools** ribbon, and then click **Advanced**.

5. On the submenu, click **Update Existing Fact in CaseMap**.

6. In the message to replace the existing link to the fact record, click **OK**.

7. In the **Send to CaseMap - Edit Fact** dialog box, verify that the transcript text displays in the **Text Selection** box.

8. Complete additional field information for the fact record, then click **OK**.

   The fact record is now updated in CaseMap and a link back to the annotated text is now set to its page/line number in the transcript in TextMap.

You can link multiple annotations to the same fact record in CaseMap using the procedures above.

Related Topics

[About annotations]
[Creating annotations]
[Sending annotations to CaseMap]

Exporting annotations

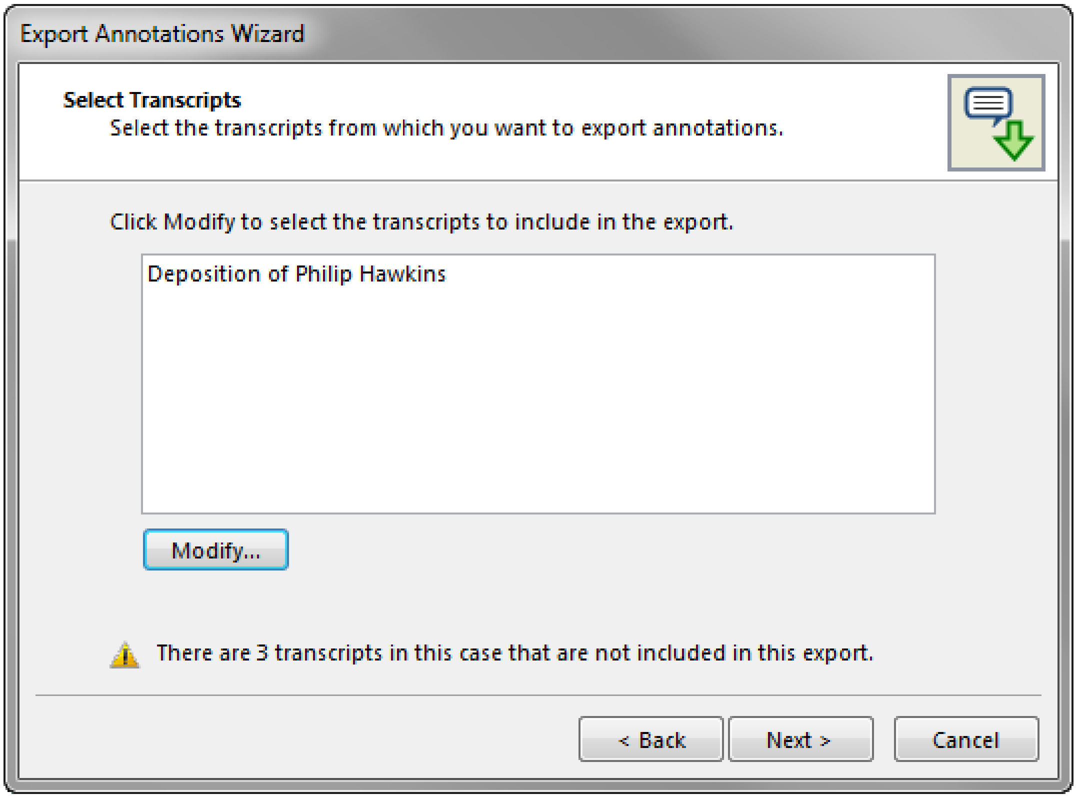
Using the Export Annotations Wizard, you can export annotations from one or more transcripts to a .csv file that can be viewed in Microsoft® Excel. Using the wizard, you can:

- Select the transcripts from which you want to export annotations
- Limit the annotations included by issue
- Choose the storage location/output file

To export annotations to a .CSV file

1. In the **Transcripts** pane, select a transcript, and then select the annotation you want to export.
2. Click **More Export** on the **Home ribbon,** and then click **Export Annotations**.

   On the File menu, you can also click Export, and then click Export Annotations.
3. In the **Export Annotations Wizard**, click **Next**.
4. On the **Select Transcripts** page, select the transcripts that have annotations you want to export.



The transcript now displays in the Transcript pane now displays in the export wizard.

The default transcript is the current, active transcript.

4. Optional: To modify the transcript list:

   a) Click the **Modify** button to add more transcripts to the export.

      The Select Transcripts dialog box opens.

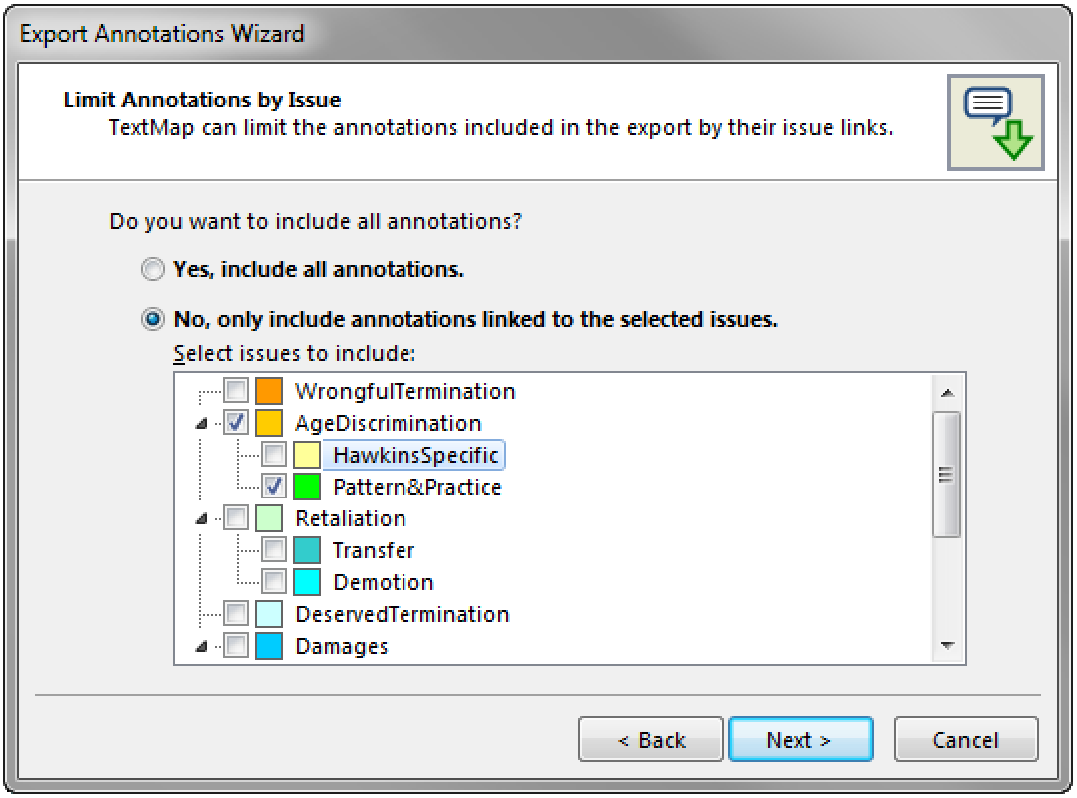
   b) In the **Available Transcripts** box, select the check box beside the transcript you want to add.

      When an item is selected, it is added to the Selected Transcripts area of the **Select Transcripts** dialog box.

   c) Optional: Click the **Select All** check box to add all transcripts in the **Available** box.

   d) Click **OK** to close the dialog box.

5. Click **Next** to display the Limit Annotation by Issue dialog box.



6. On the **Limit Annotations by Issue** page, select one of the following:

   To include all annotations

   a. Select the **Yes, include all annotations** check box to export all annotations.

   b. Click **Next**.

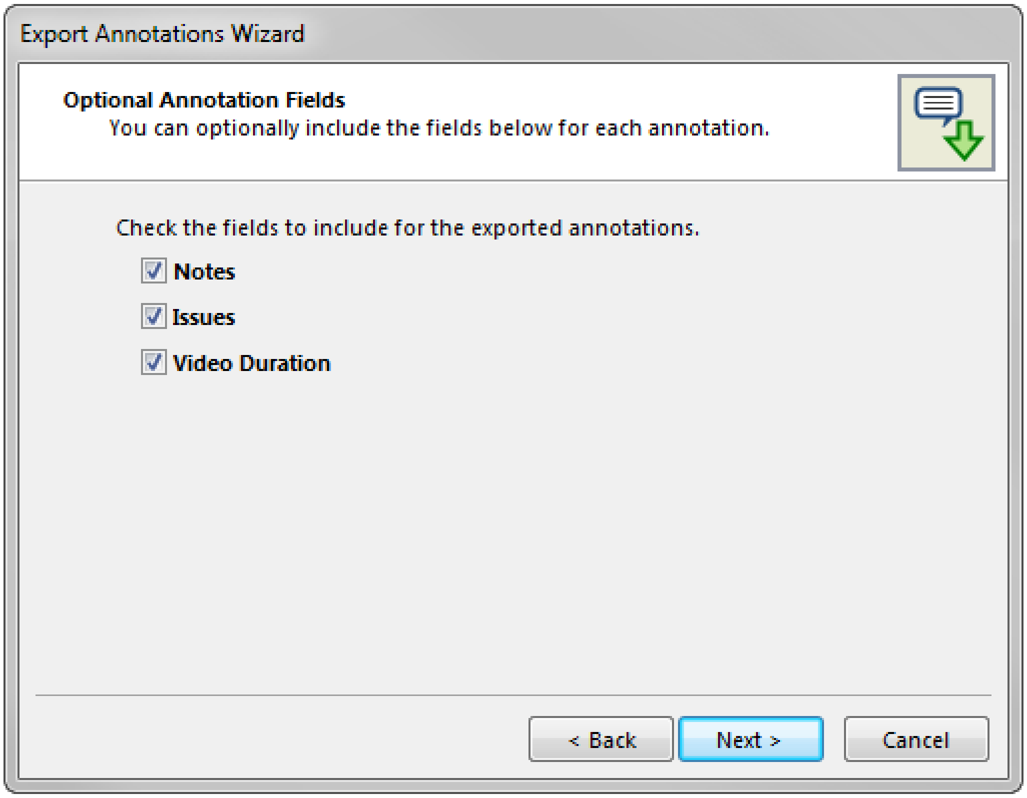
   To include only annotations linked to issues

   a. Select the **No, only include annotations linked to the selected issues** check box to include only the annotations that are linked to the issues that are selected here.

   b. In the **Select issues to include** area, select the check box(es) for all annotations to be included in the export.

   c. Click **Next**.

7. In the **Optional Annotations Fields** dialog box, select the field(s) to be included with the exported annotations:



Notes -- Include a field to list the note(s) associated with each annotation.

Issues -- Include a field to list the issue(s) associated with each annotation.

Video Duration -- Include a field to list the length of the video clip.

8. Click **Next** to continue.

   The Output File dialog box opens.

9. Click the **Browse** button to choose a file name and storage location.

10. In the **Export Annotations** dialog box, navigate to the folder where you want to save the .CSV file.

    This folder defaults to the export folder selected in the File Locations tab in the Tools > Options dialog box.

12. In the **File Name** field, type in a name for the .CSV file, and then click **Save**.

13. On the **Output File** page, click **Next** to initiate the export.

    The Completing the Export Annotations Wizard displays the number of annotations exported.

14. Optional: Click the hyperlink to view the output file.

    The exported annotations can be viewed in Microsoft Excel. Transcripts display in alphabetical order.

	A	B	C	D	E	F	G	H	I
1	Transcript	PgFrom	LnFrom	PgTo	LnTo	Notes	Issues	VideoDuration	
2	Depositio	17	18	17	23		Pattern&Practic	0:00:00	
3	Depositio	5	13	5	18	Varvaro expla	Pattern&Practic	0:00:25	

15. Optional: To calculate video clip duration, perform the following:

    Calculating the total video duration is very beneficial when it comes to determining if you are within the allotted time when making presentations.

    a. In the **Completing the Export Annotations Wizard** dialog box, click the **Click here to open the output file** hyperlink.

       The output file opens in Microsoft® Excel®.

    b. In the Excel spreadsheet, place the cursor below the last entry in the **Video Duration** column and click the **Auto Sum** button.

       The total duration time is displayed.

    c. Save and close the Excel spreadsheet.

16. Click the **Finish** button to close the wizard.

Related Topics

[About exporting](#)
[Exporting transcripts](#)
[Exporting data to an iPad](#)

Exporting a Sanction clip list

The Export Sanction Clip List Wizard allows you to export a transcript's annotations by select issues to a Sanction clip list. TextMap skips any annotations that are not linked to a selected issue. Once the text file is exported, you can then import the clip list into Sanction. Annotations display in the text file in page/line order.

To export a Sanction clip list

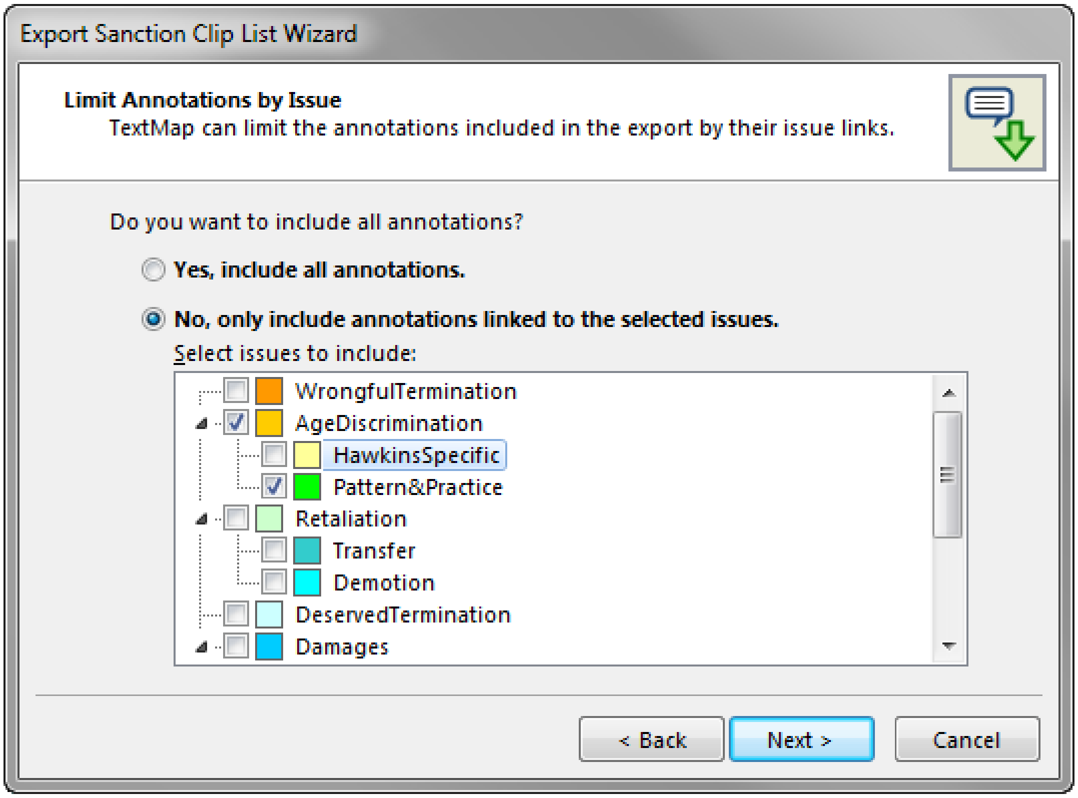
1. In the **Transcript** pane, select the transcript for which you want to export annotations.

2. Click **More Export** on the **Home Ribbon**, and then click **Export Sanction Clip List**.

   On the File menu, you can click Export, and the Export Sanction Clip List to open the wizard.

3. In the **Export Sanction Clip List Wizard**, click **Next**.

4. On the **Limit Annotations by Issue** page, you can choose to only export annotations to the linked issues you select.



5. Click **Next** to continue.

6. On the **Output File** page, click the **Browse** button.

7. In the **Export Sanction Clip List** dialog box, navigate to the folder where you want to save the file.

   The default file type is a text file.

   This folder defaults to the export folder selected in the File Locations tab in the Tools > Options dialog box.

8. In the **File Name** field, type in a name for the text file, then click **Save**.

9. On the **Output File** page, click **Next** to initiate the export.

10. Click the hyperlink to view the output file.

    The clip list now displays in a text file.

11. Click the **Finish** button to close the wizard.

    You can now import the text file into Sanction.

Related Topics

About exporting
Exporting annotations
Exporting videos

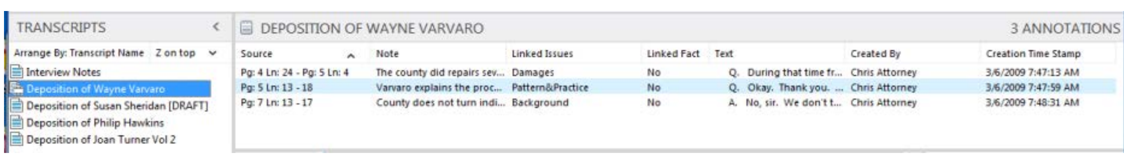
Sending annotations as Sanction media clips

TextMap® allows you to send a single annotation, or bulk send all annotations that contains video to the LexisNexis® Sanction® application as media clips.

To send an annotation to Sanction as a media clip

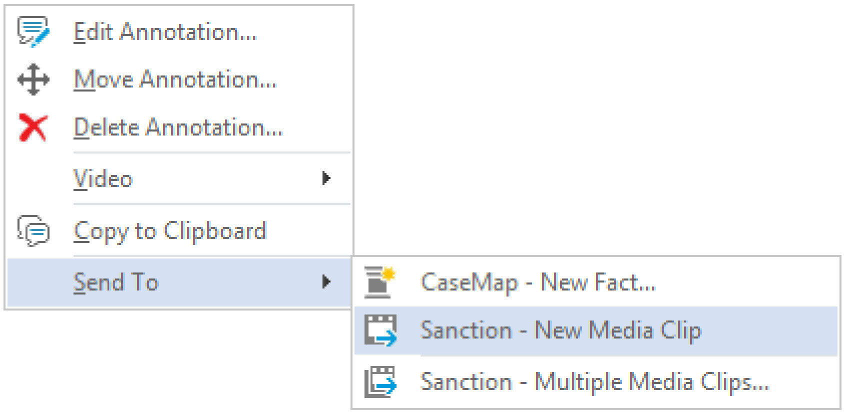
1. Open a case in **Sanction® 3.5** or later.
2. In the **Transcripts** pane, select a transcript from the list that has both annotations and video.

> The video icon indicates a transcript with video.



3. Click on the annotation to be sent to Sanction.
4. On the **Create & Edit** tab of the **Text & Video Tools** ribbon, click **More**, and then click **Send Media Clip to Sanction**.

   You can also right-click on the annotation to be sent, select Send To, and then click Sanction - New Media Clip.

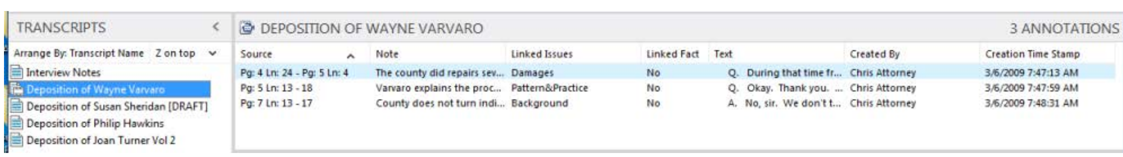


If adjustments have been made to the start and stop times of a video, those adjustments will be retained when the media clip(s) are sent to Sanction. See Editing videos for additional information.

To bulk send annotations as Sanction media clips

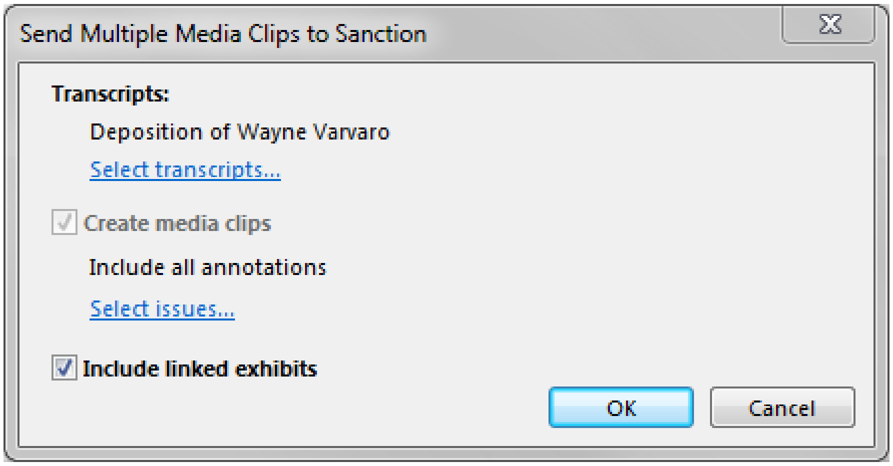
1. Open a case in **Sanction® 3.5** or later.
2. In the **Transcripts** pane, select a transcript from the list that has both annotations and video.

The video icon indicates a transcript with video.



3. Select the annotations to be sent to Sanction to display the Text & Video Tools ribbon.
4. On the **Options** tab, click **Send Multiple Media Clips**.

   You can also right-click on the annotations to be sent, click Send To, and then click Sanction - Multiple Media Clips.
5. In the **Send Multiple Media Clips to Sanction** dialog box, perform all applicable steps:



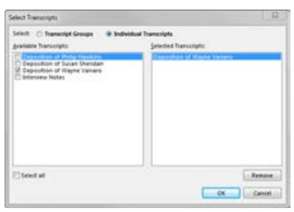
⊟ To select multiple transcripts

a. In the **Select Transcripts** dialog box, click **Transcripts Groups** to list transcripts by groups, or click **Individual Transcripts** to list transcripts individually.

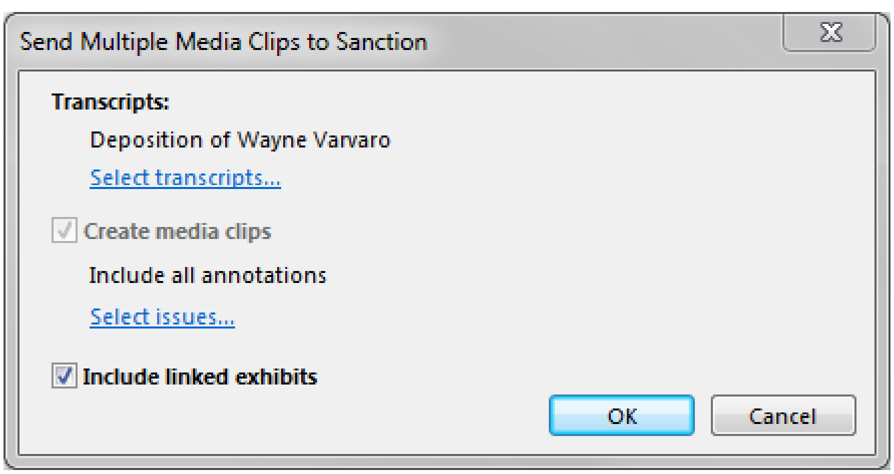
   For this example, Individual Transcripts is selected.

b. In the **Available Transcripts** column, place a check mark beside the transcript(s) to be sent to Sanction.

   Optional: Place a check mark in the Select all check box to simultaneously select all transcripts.

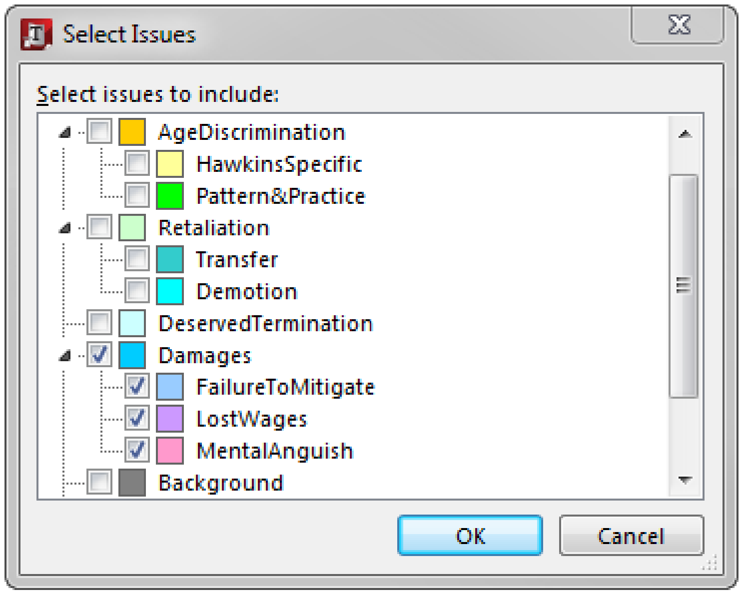
c. Click **OK** to display the **Send Multiple Media Clips to Sanction** dialog box.

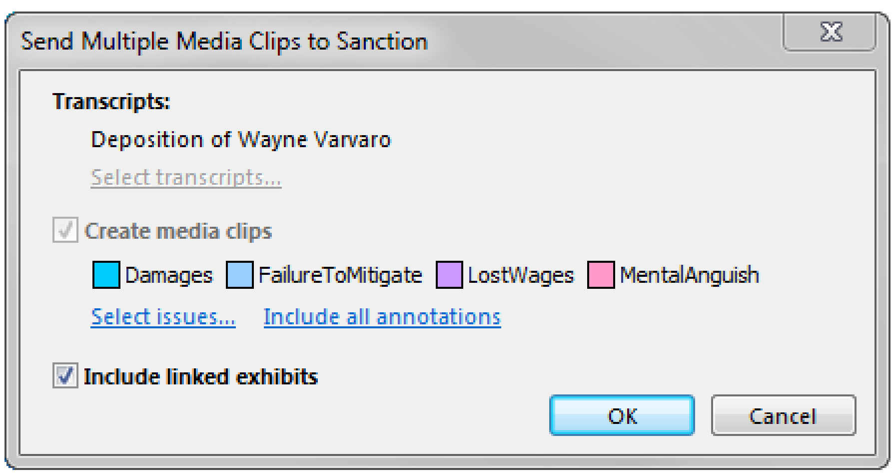
⊟ To send media clips by issue

a. In the **Send Multiple Media Clips to Sanction** dialog box, click **Select issues** to open the **Select Issues** dialog box.

b. In the **Select Issues** dialog box, select (place a check mark) beside the issue(s) associated with media clip(s) to be sent to Sanction.



c. Click **OK** to display the information being sent to Sanction.



The issues selected here are recalled the next time the Send Multiple Media Clips to Sanction dialog box is opened, unless otherwise changed.

d. Optional: Click **Include all annotations** to deselect the issues selected in the step above and to return to sending all annotations to Sanction.

e. Click **OK** to continue.

Related Topics

About transcripts
About annotations
Sending transcripts to Sanction
Editing videos

Working with Exhibits

About exhibits

Exhibits can be files on your computer, web addresses, and custom links to other document management programs. When you have a file that has been referred to as an exhibit during a transcript, you want that file to be linked wherever that exhibit is referred to in the transcript. You can link to exhibits using either the TextMap Exhibit Linker or the Auto Link Exhibit Wizard.

Link Exhibit Wizards include:

- **TextMap Exhibit Linker** is used before importing transcripts into a TextMap case. This software is provided to court reporters, vendors, and law firm staff so that they can create TextMap Exhibit Packages (.xmef) which can then be imported into TextMap. These files already have the exhibit links embedded in the transcripts. TextMap also imports the linked exhibit PDFs during the import process.
- **Auto Link Exhibit Wizard** is used once a transcript is imported into TextMap. With the Auto Link Exhibit Wizard, you can create a hyperlink to a file on your computer, a web address, or a link to another document management system everywhere in the transcript where the exhibit is mentioned.

The Exhibit Autolink Aliases tool is used to configure aliases on a per-case level to find automatic links within a transcript. Once the aliases have been created, you can bulk link exhibits to the selected transcript using the Auto Link Exhibit Wizard. See Creating exhibit autolink aliases.

Hyperlinks for exhibit files display in the Exhibits and Video pane in the Exhibits pane for the selected transcript. When you click a page and line reference, TextMap displays that point in the transcript. You can view the exhibit by clicking the hyperlink in the transcript or by right-clicking on the exhibit link in the Exhibits pane and clicking Open. You must have the native application installed on your computer in order to view the file. See Adding/changing file viewers.

Exhibit files that do not create transcript hyperlinks appear in the Exhibits and Video pane as non-hyperlinked exhibits and are copied to the case transcript exhibit folder. Hyperlinks can be created at a later time by updating the Exhibit Properties. See Editing exhibits.

Exhibit files should be saved to a network folder to ensure that all case users have access to the files. For more information about file paths for both local and SQL cases, see Changing the case exhibits path.

To link exhibits or any other files to a single passage in the transcript, use the New Hyperlink Wizard. See Creating single hyperlinks in transcripts.

If you move exhibit files linked to a transcript, you will need to change the file paths in TextMap in order to preserve the hyperlinks. See Changing exhibit file paths.

If you are working on a case while out of the office, create a replica case so you have access to all linked files and exhibits. Web sites and links to files in a document management systems will not transfer to a replica case. See Creating replica cases.

Related Topics

Using TextMap Exhibit Linker
Importing exhibit packages
Linking exhibits to transcripts
Viewing exhibits
Editing exhibits
Verifying linked exhibits
Changing exhibit file paths
Changing case exhibits path
Creating exhibit autolink aliases

Using TextMap Exhibit Linker

Using TextMap Exhibit Linker

TextMap Exhibit Linker is tool used before you import transcripts into a TextMap case. This software is provided to court reporters, vendors, and law firm staff so that they can create TextMap Exhibit Packages (*.xmef), which can then be imported into TextMap. This simplifies the process of adding hyper-linked exhibit files to an ASCII or PTF text file of a deposition or other transcript.

TextMap Exhibit Linker creates a word index from the imported transcript file. You can then use the search pane to locate references to exhibits or other words. As you type a word, Exhibit Linker searches for and displays "hits" for the search along with page/line references that are hyperlinks to the word you're looking for. Place your mouse over a page/line reference and Exhibit Linker will give you a preview of the context you will find if you click the hyperlink.

TextMap Exhibit Linker must be installed before you can import transcripts into the case. To download TextMap Exhibit Linker, go to www.casemap.com/appsdownload. For more information about the product, see www.casemap.com/textmap.

To use TextMap Exhibit Linker

These steps are an overview of the import process. In TextMap Exhibit Linker, click the Help menu for complete instructions on how to use this software.

1. Open a transcript (ASCII text file).
2. Import linked exhibits to the file.
3. Save it in .xmef file format.
4. Email it to the user who imports the file into the TextMap case.

Related Topics

About exhibits
Linking exhibits to transcripts
Importing exhibit packages
Changing exhibit file paths

Importing exhibit packages

TextMap Exhibit Packages (created by TextMap® Exhibit Linker) include a transcript, hyperlinks to exhibits mentioned throughout the text, and the linked exhibit documents. You import an Exhibit Package file (*.xmef) just like any other transcript. All the exhibits and exhibit hyperlinks in the transcript are available instantly.

When you import an Exhibit Package file (*.xmef), the following occurs:

- It creates a folder and is stored in its own folder.
- If the name of the transcript is longer than 80 characters, the folder created will also be truncated at 80 characters.
- When TextMap imports a transcript with a name of one that already exists, it and the associated folder names are made unique by applying a number to the end.
- Invalid characters are not allowed in the transcript name, and will be removed.

You can also import TextMap Exhibit Packages (*.xmef files) with linked exhibits into a SQL case. During the import process, TextMap displays a message for you to select the exhibits path folder for the case, if it has not already been set.

Exhibit files should be saved to a network folder to ensure that all case users have access to the files. You can also set this path in the Case Properties dialog box, if you have permissions to do so. See Changing exhibits file paths. If you choose not to set the exhibit folder path during the import, the transcript will be imported into the SQL case without the linked exhibit files.

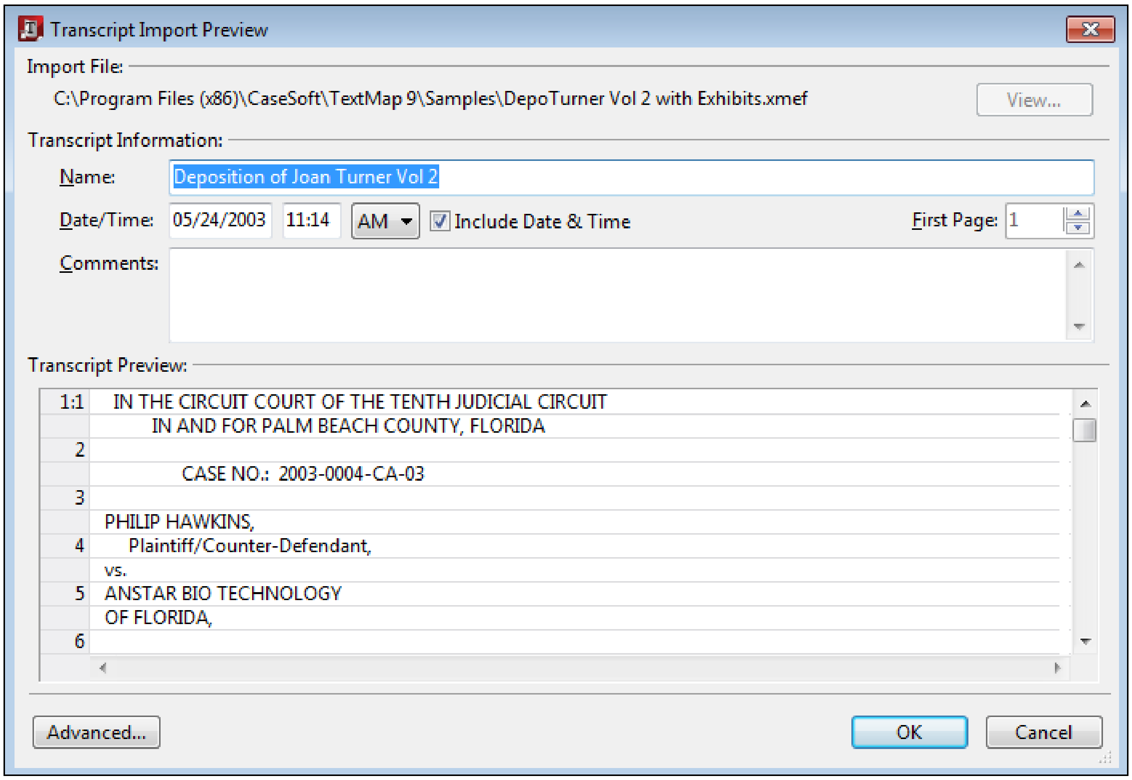
To import exhibit packages with linked exhibits

1. On the **Home** ribbon, click **Import Transcript**.

You can also click Import on the File menu, and then click Import Transcripts.

2. In the **Select one or more Transcripts to Import** dialog box, select the exhibits package that you want to import, and then click **Select**.

3. In the **Transcript Import Preview** dialog box, review the transcript information and type in any comments you want to track regarding the imported files.



TextMap searches the transcript and uses the first date it locates to automatically fill in the Date field. You can modify this date, if necessary.

4. Click the **Advanced** button if you want to modify page numbering or review transcript format details.

5. Click **OK** to continue.

When the import process is complete, the imported transcript displays in the Transcripts pane and the exhibit files are copied into the case exhibits folder.

4. In the **Navigation** pane, click the **Exhibits and Video** button to display linked exhibits and other documents included in the exhibit package.

Related Topics

About exhibits
Using TextMap Exhibit Linker
Changing exhibit file paths

Creating exhibit autolink aliases

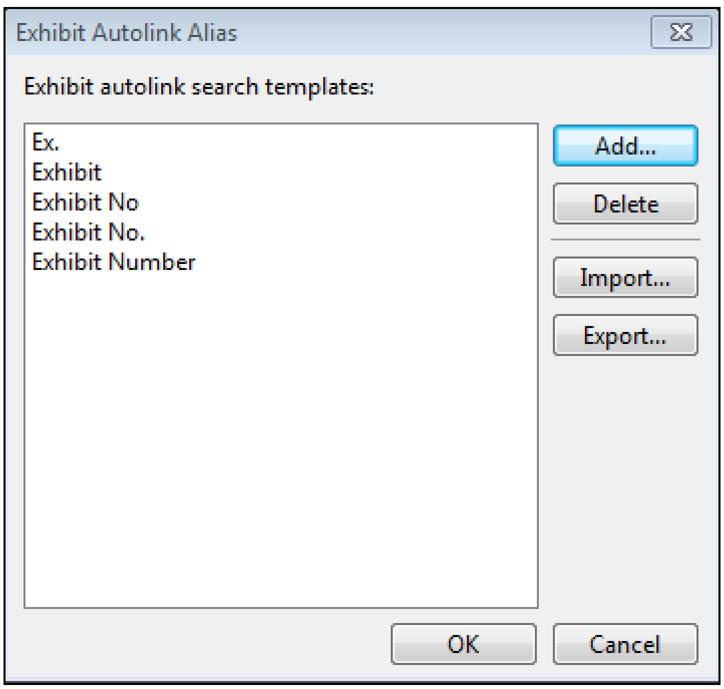
The Exhibit Autolink Aliases tool is used to configure aliases on a per-case level to find automatic links within a transcript. Once the aliases have been created, you can bulk link exhibits to the selected transcript using the Auto Link Exhibit Wizard.

Aliases can be imported and exported using a text file, or added and deleted using the Exhibit Autolink Aliases tool.

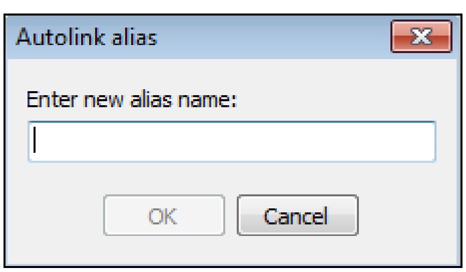
To create exhibit autolink aliases

1. Click the **Case Tools** tab, and then click **Exhibit Autolink Aliases**.

2. In the **Exhibit Autolink Alias** dialog box, click **Add.**



3. Type the new alias name and then click **OK.**

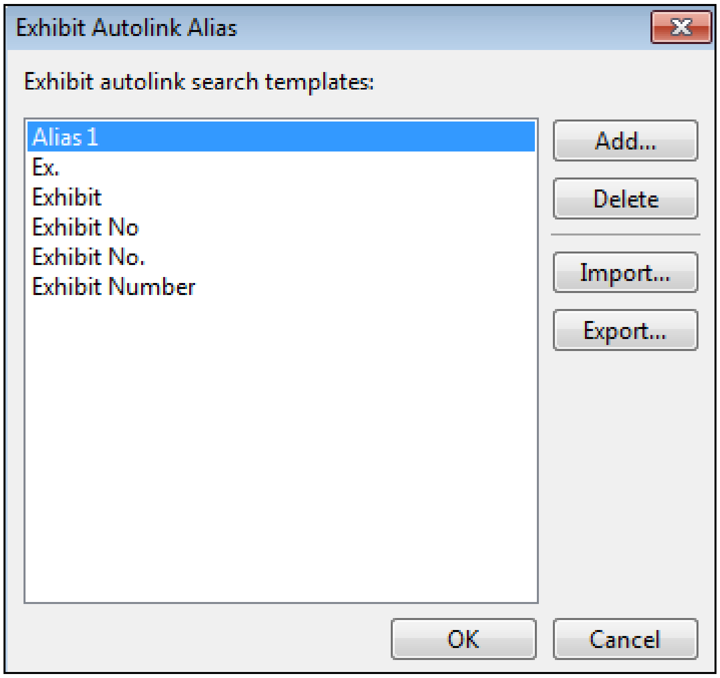


The alias is added to the list of Autolink search templates.

4. Click **OK** to close the **Exhibit Autolink Alias** dialog box.

To delete exhibit autolink aliases

1. Click the **Case Tools** tab, and then click **Exhibit Autolink Aliases**.
2. In the **Exhibit Autolink Alias** dialog box, select the alias you want to remove, and then click **Delete.**



The alias is removed from the list of Autolink search templates.

3. Click **OK** to close the **Exhibit Autolink Alias** dialog box.

Existing hyperlinks are not removed when the alias name is deleted.

To import exhibit autolink aliases from a text file

1. Click the **Case Tools** tab, and then click **Exhibit Autolink Aliases**.
2. In the **Exhibit Autolink Alias** dialog box, click **Import**.
3. Navigate to the folder of the existing text file, select the file you want to import and then click **Open**.

   The imported alias names are added to the list of Exhibit autolink search templates.
4. Click **OK** to close the **Exhibit Autolink Alias** dialog box.

To export exhibit autolink aliases to a text file

1. Click the **Case Tools** tab, and then click **Exhibit Autolink Aliases**.

2. In the **Exhibit Autolink Alias** dialog box, click **Export**.

3. Navigate to the folder where you want to save the file and type the File name.

The default name is AutolinkAliases.txt.

4. Click **Save**.

The alias names are exported to the text file.

5. Click **OK** to close the **Exhibit Autolink Alias** dialog box.

Related Topics

About exhibits
Linking exhibits to transcripts

Linking exhibits to transcripts

The Auto Link Exhibit Wizard is used once you have already imported a transcript into TextMap. With this wizard, you can add multiple files, web addresses, or link to another document management system anywhere in the transcript where the exhibit is mentioned. You can bulk link exhibit files on your computer and web addresses, as well as add custom links to other document management programs. You can even make a document in CaseMap a hyperlinked exhibit in TextMap.

To link exhibits or any other files to a single passage in the transcript, use the New Hyperlink Wizard. See Creating single hyperlinks in transcripts.

To link a new exhibit to this case

1. In the **Navigation** pane, click the **Exhibits and Video** button.

2. In the **Exhibit Tasks** pane, click **Link exhibits to this transcript** to open the Auto Link Exhibit Wizard.

3. On the **Auto Link Exhibit Wizard's Welcome** page, click **Next**.

4. On the **New or Existing Exhibit** page, select the option, **Yes, I want to link a new exhibit to this case**, and then click **Next.**

5. On the Document Type page, select the type of document you want to link, and then click **Next**:

To add Files:

To add Files, do the following:

1. On the **Bulk Link Multiple Files** page, click the **Add** drop down arrow and then click **Add Files**.

2. Navigate to the folder location where the files are saved.

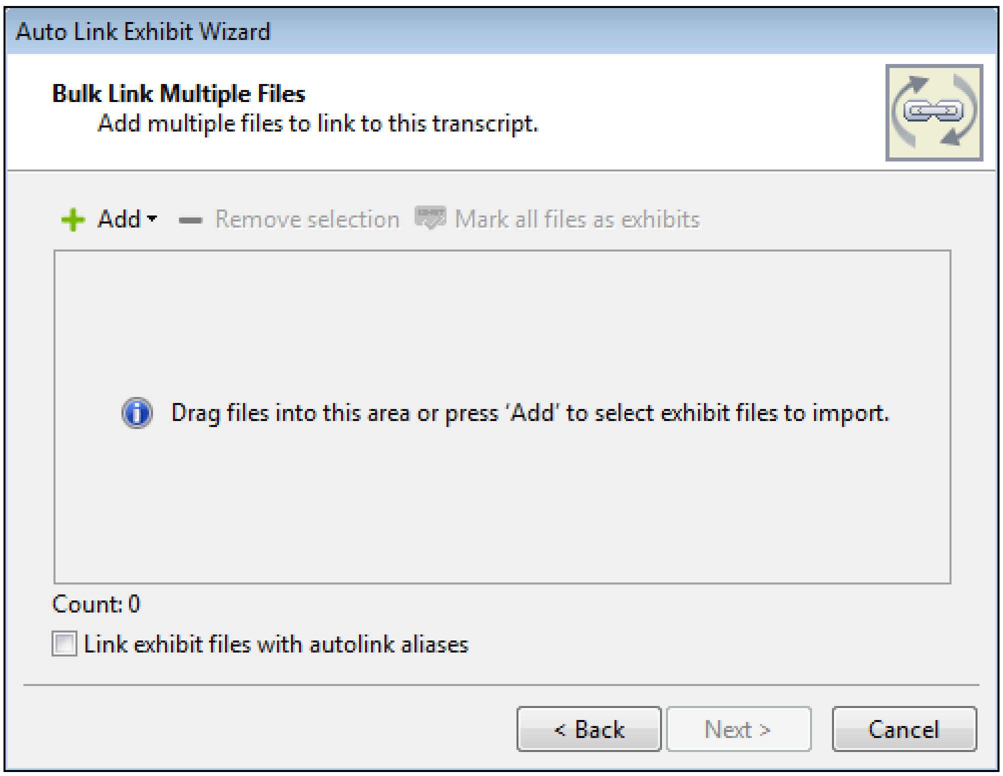
3. In the **Select One or More Exhibits** dialog box, select the file(s), and then click **Open**.

To Add URLs, do the following:

1. On the **Bulk Link Multiple Files** page, click the **Add** arrow and then click **Add URLs**.

2. Enter the address of the web page for the new exhibit and then click **OK**.

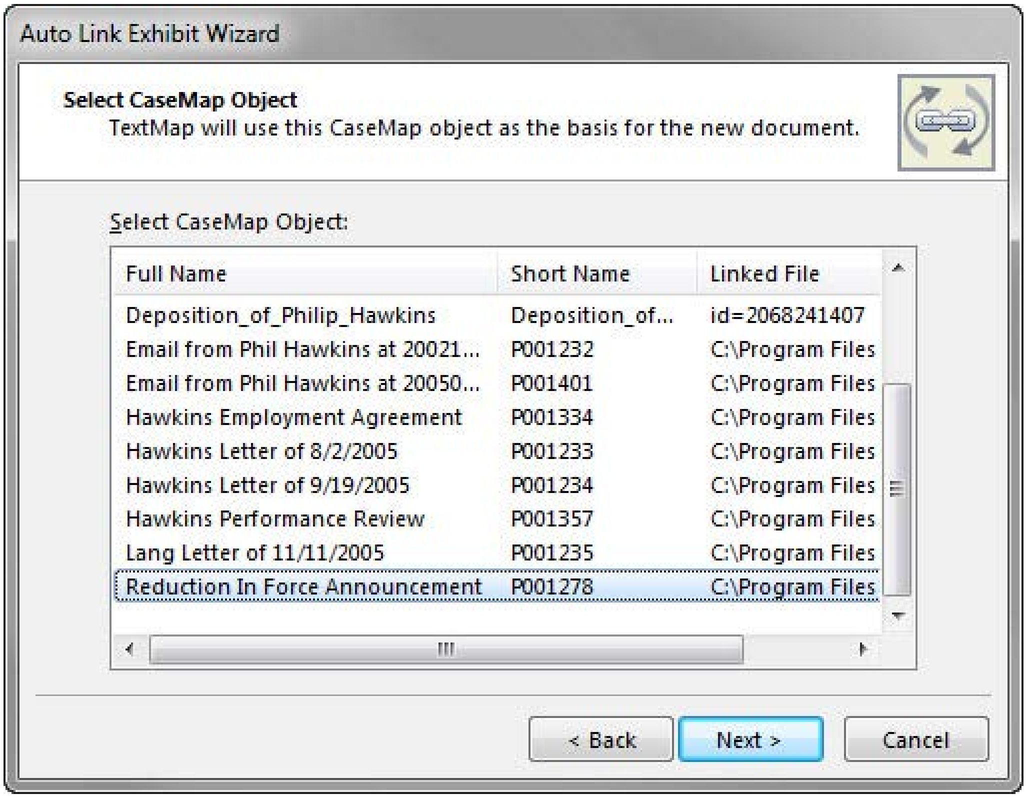
To add files via the drag-and-drop operation, drag your selected files into the specified area on the **Bulk Link Multiple Files** page.



To add a document linked in CaseMap:

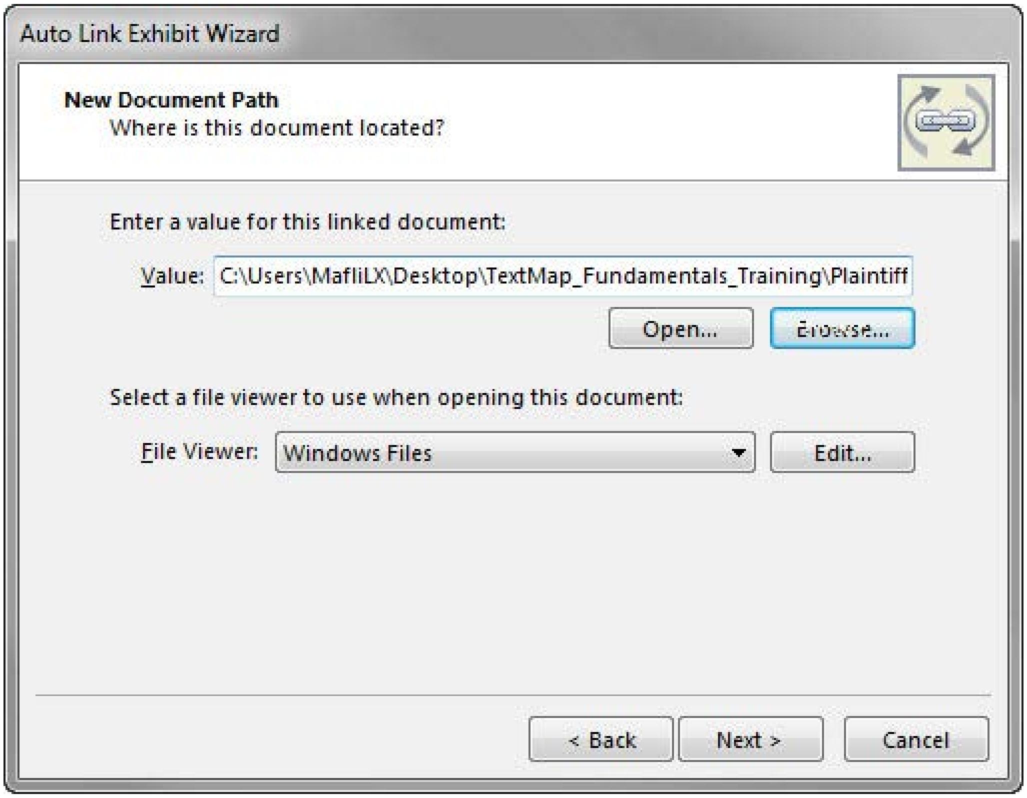
1. On the **Connect to CaseMap** page, launch CaseMap and open the corresponding case (if you have not already done so), and then click **Next**.

2. On the **Select CaseMap Object** page, select the file(s) you want to link, and then click **Next**.



To add a custom link:

1. On the **New Exhibit Path** page, click **Open** or **Browse** to navigate to the folder location where the file is saved, and then click **Open**.



2. In the **File Viewer** list, click the type of viewer you need for the file, and then click **Next**.

3. On the **New Exhibit Name** page, type or edit the file name.

   The contents of the Name box is automatically filled with the file name of the linked file. TextMap searches the transcript for the name and creates a hyperlink to the file at each location.

4. For the question, **Is this document an exhibit?**, click **Yes** or **No**.

   If the document is not an exhibit it will display in the Exhibits pane under Other Linked Documents.

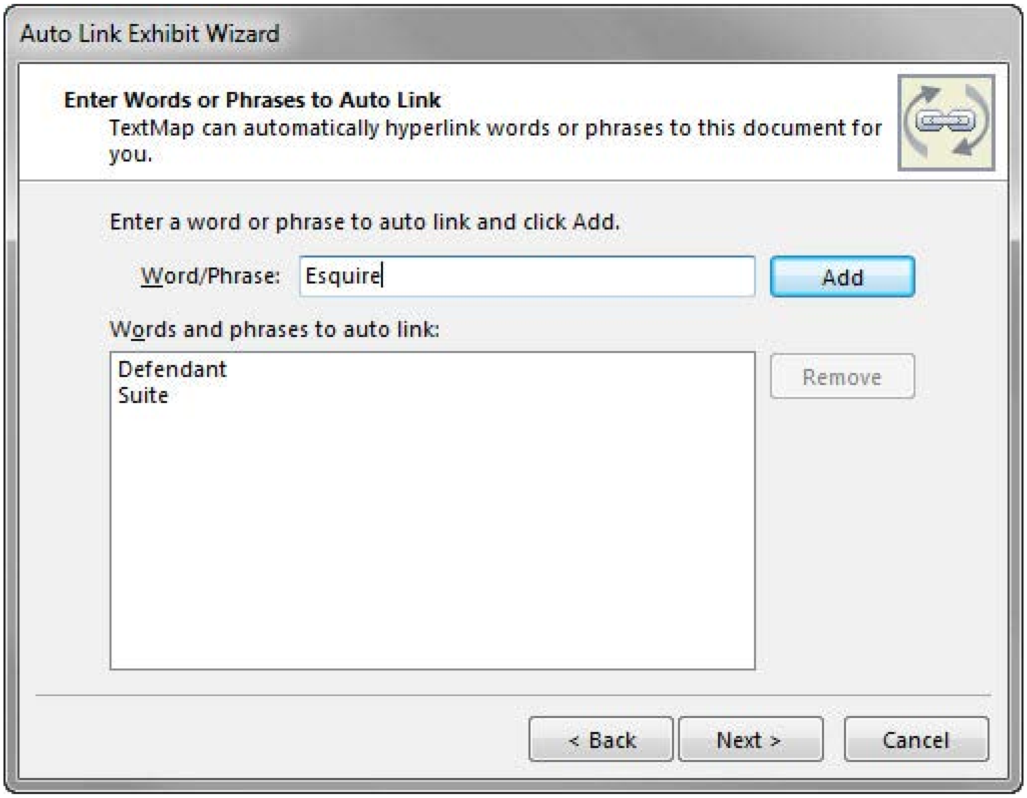
5. On the **Found References to Document** page, review the number of references found in the transcript.

   If there are no references found, on the No References to Document Found page, type in a word or phrase to link to this document, then click **Next**. TextMap automatically creates links in the transcript where all instances of the word or phrase is located in the transcript.

6. Determine whether you want to add more words or phrases and select on one of the following:

   - Yes, I want to add more words or phrases to auto link.

     1. On the **Enter Words or Phrases to Auto Link** page, type in a word or phrase to auto link, and then click **Add**.



2. In the message box, click **OK**.

3. Continue adding words or phrases until finished.

- No, I do not want to add more words or phrases to auto link.

  Skip to **Step 7**.

By default, all files will be marked as exhibits. To change, click Mark all files as exhibits.

If the Exhibit name or Autolink ID need to be modified, click the **Exhibit Name** or **Autolink ID** fields to modify. The Autolink ID will update based on the exhibit name.

Exhibit names and Autolink IDs must be unique and cannot be duplicated.

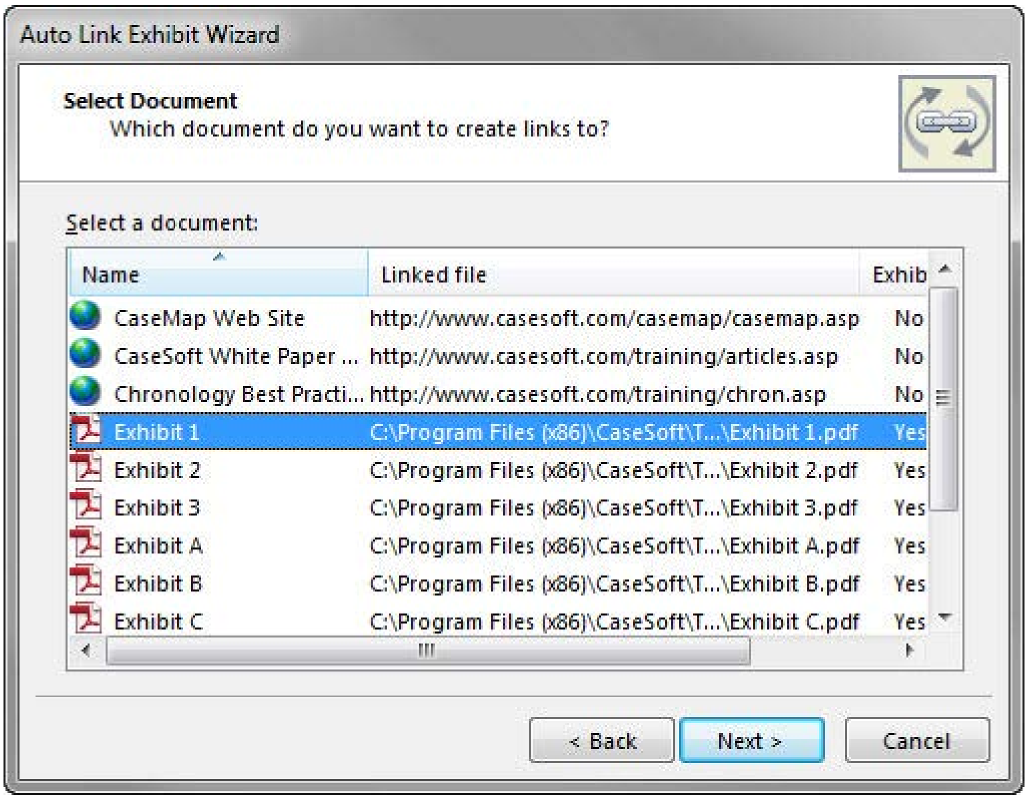
If the **Link exhibit files with autolink aliases** check box is selected, the hyperlink will be created by pairing the Autolink alias with the Autolink ID. If the box is not selected, and there are no Autolink alias names defined, the hyperlink will be created from the Exhibit name.

6. Click **Next**.

7. On the **Completing the Auto Link Exhibit Wizard** page, click **Finish**.

To link an existing linked document to this case

1. In the **Navigation** pane, click the **Exhibits and Video** button.
2. In the **Exhibit Tasks** pane, click **Link exhibits to this transcript** to open the Auto Link Exhibit Wizard.
3. On the **Auto Link Exhibit Wizard's Welcome** page, and then click **Next**.
4. On the **New or Existing Exhibit** page, select the option, **No, I want to link to an existing linked exhibit**, and then click **Next**.
5. On the **Select Exhibit** page, select the file for which you want to link, and then click **Next**.



6. On the **Completing the Auto Link Exhibit Wizard** page, click **Finish**.

   When you click **Finish**, TextMap will open the **Exhibit Properties** dialog for the selected exhibit.

7. In the **Exhibit Properties** dialog box, enter a word or phrase to autolink to this document, and then click **Add**.

   TextMap automatically creates links in the transcript where all instances of the word or phrase is located in the transcript.

8. Continue adding words or phrases until finished, and then click **OK**.

Related Topics

About exhibits
Using TextMap Exhibit Linker
Importing exhibit packages
Creating single hyperlinks in transcripts
Viewing exhibits

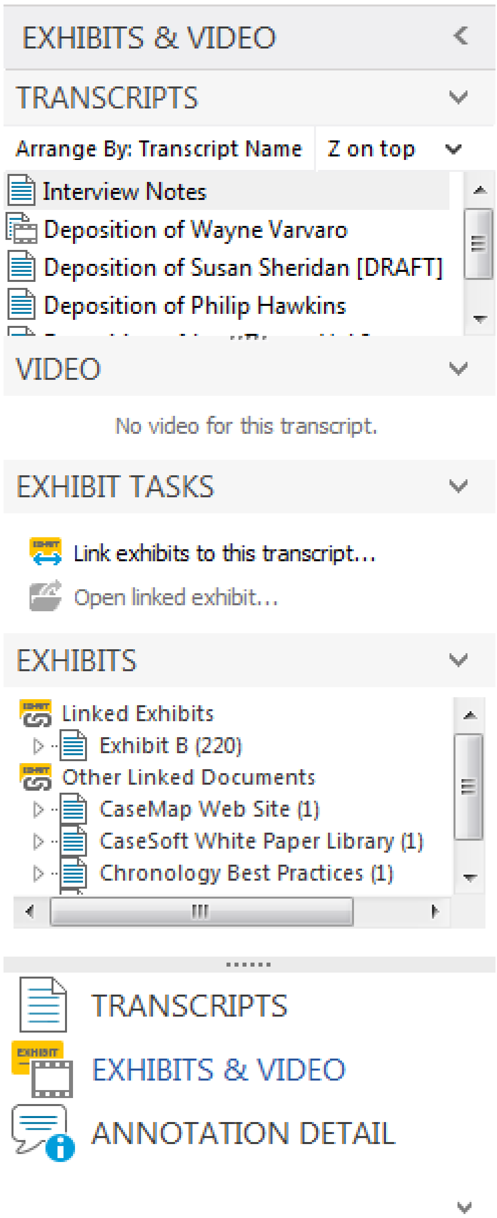
Creating single hyperlinks in transcripts

The New Hyperlink Wizard allows you to link an exhibit or other file anywhere in a transcript or annotation. Using this wizard is helpful, after you have used the Auto-Link Wizard or received files from your court reporter.

Linked files can be exhibit files on your computer, web addresses, and custom links to other document management programs. Linked exhibits or other files can be added to a transcript anywhere you want to link to them in the transcript. The document or file that you link to the transcript or annotation may be an existing document already linked or a new document. It may also be an exhibit. You can specify what type of document it is in the New Hyperlink Wizard.

Linked files display under Other Linked Documents in the Exhibits task pane of the Exhibits and Video pane, unless marked as an exhibit in the Exhibit Properties dialog box. See Editing exhibits.

For more information on linking files when annotating, see Creating annotations.



To link files to transcripts

1. Select the transcript text where you want to link to an exhibit.
2. Right-click on the text just selected, and on the menu, click **Hyperlink,** and then on the submenu, click **Insert**.
3. On **New Hyperlink Wizard's Welcome** page, click **Next**.
4. On the **New or Existing Document** page, select whether to link to a new or existing document, then click **Next**.

Yes, I want to link a new document to this case

On the **Document Type** page, select the type of document you want to which you want to link, and then click **Next**.

File

a. On the **New Document Path** page, click **Browse** to navigate to the folder location where the file is saved.

b. In the **Open** dialog box, select the file and then click **Open**.

c. Click **Next**.

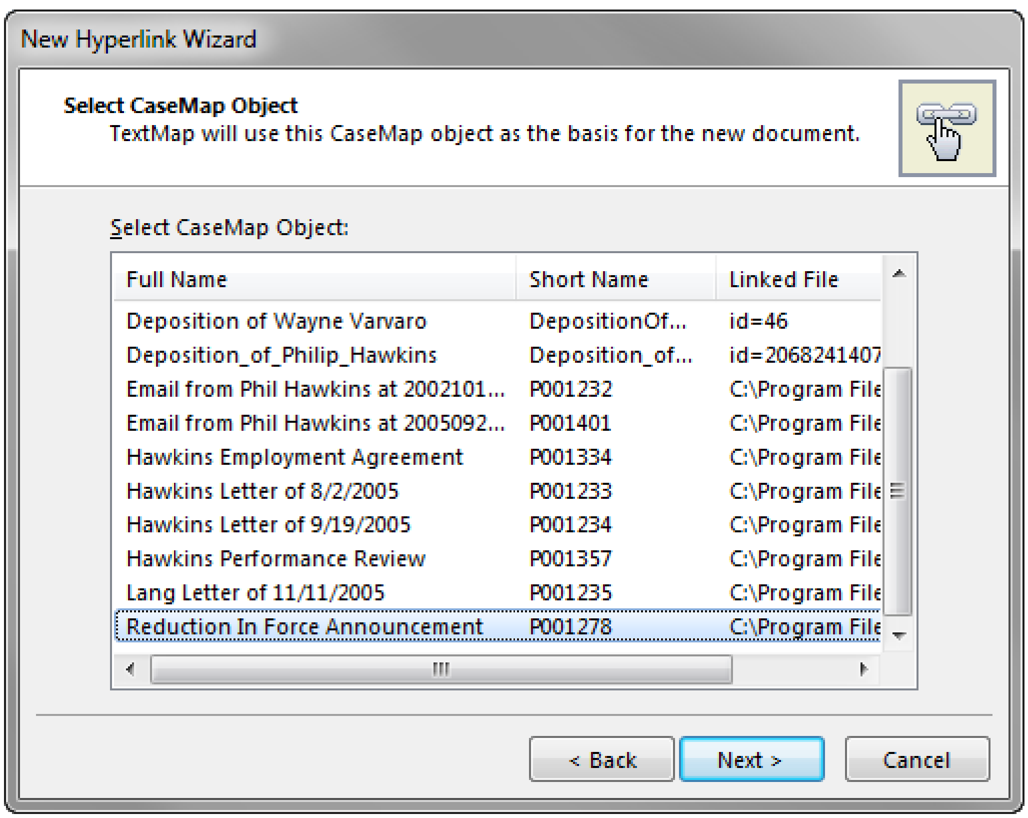
Web Address

On the **New Document Web Address** page, type in the web page address for the document, then click **Next**.

Document Linked to CaseMap

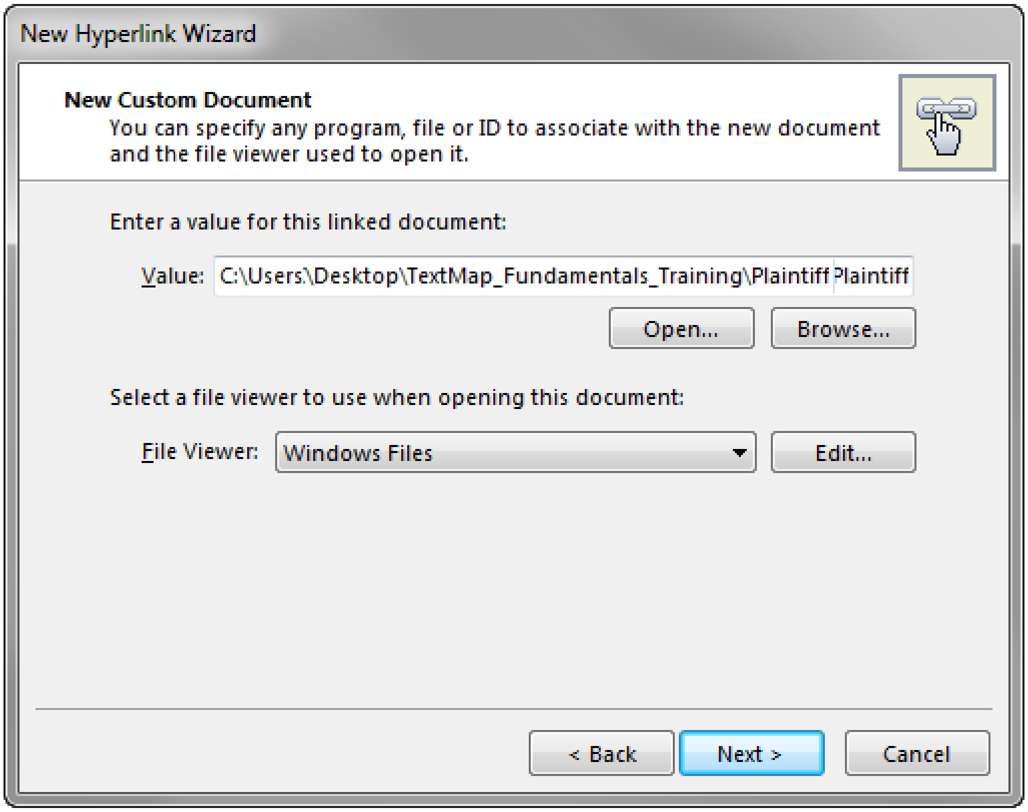
a. On the **Connect to CaseMap** page, launch CaseMap and open the corresponding case (if you have not already done so), then click **Next**.

b. On the **Select CaseMap Object** page, select the type of file for which you want to link, then click **Next**.



Custom Link

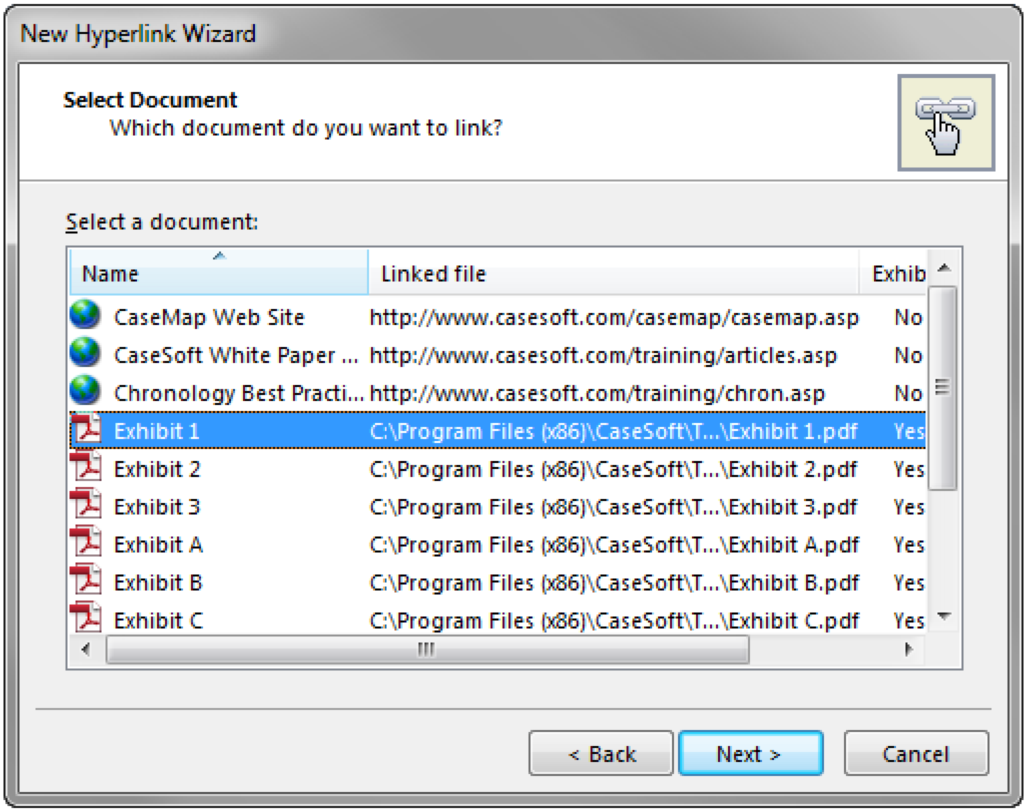
a. On the **New Document Path** page, click **Open** or **Browse** to navigate to the folder location where the file is saved, then click **Open**.



b. In the **File Viewer** list, click the type of viewer you need for the file, then click **Next**.

No, I want to link to an existing document

a. On the **Select Document** page, select the file for which you want to link, then click **Next**.



b. Skip to **Step 7**.

5. On the **New Document Name** page, type or edit the file name.

   The contents of the Name box is automatically filled with the file name of the linked file. TextMap searches the transcript for the name and creates a hyperlink to the selected location.

6. For the question, **Is this document an exhibit?**, click **Yes** or **No**.

   If the document is not an exhibit it will display in the Exhibits pane under Other Linked Documents.

7. On the **Completing the New Hyperlink Wizard** page, click **Finish**.

Related Topics

About exhibits
Linking exhibits to transcripts
Creating annotations

Viewing exhibits

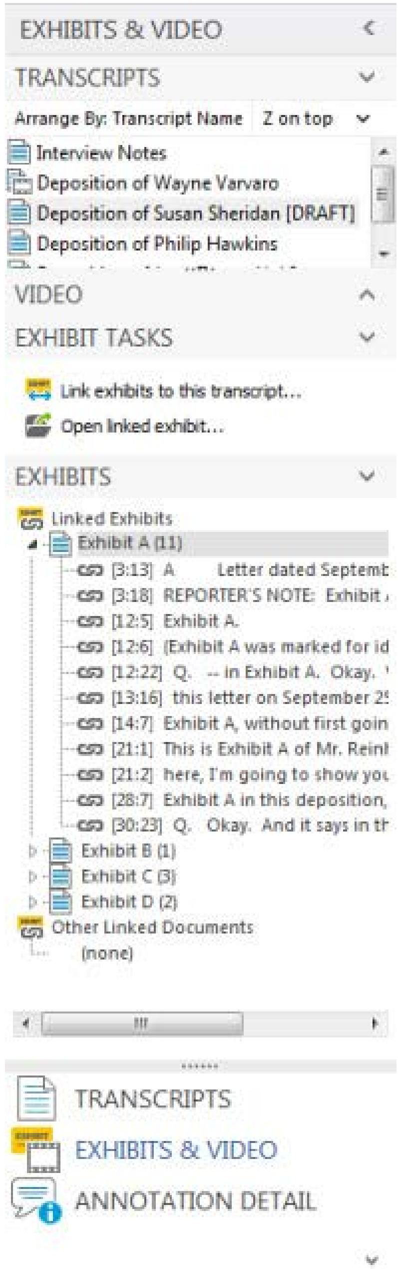
View and navigate to hyperlinked exhibits in the Exhibits panel of the Exhibits and Video pane. Linked files that are not exhibits display under Other Linked Documents in the same pane.

Exhibits automatically sort in alphabetical order, but you can also sort exhibits and video by exhibit number.

You must have the native application installed on your computer in order to view the files. To add an application as a file viewer in TextMap, see Adding/changing file viewers.

To view and open exhibits

1. In the **Navigation** pane, click the **Exhibits and Video** button.

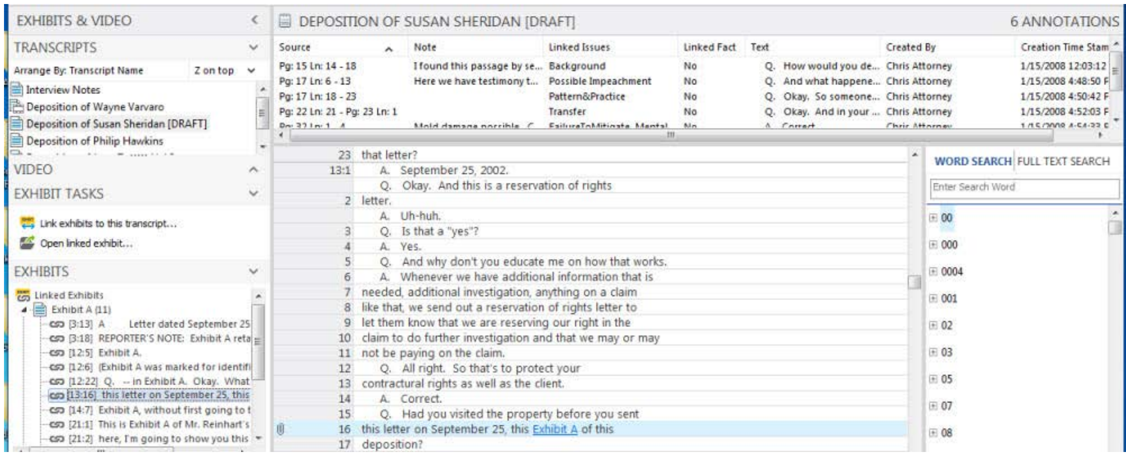


2. In the **Exhibits** pane under **Linked Exhibits**, click the **Expand** button beside an exhibit to view the list of transcript hyperlinks.

3. Click on a link to open the transcript to the page/line number where the text link is located.

4. In the **Transcript** window, notice that a Paperclip icon displays next to the page/line number.

   You can also right-click on the Exhibit link and click Open.



5. Click the **Paperclip** icon to view the hyperlink path for the linked file.

A pop-up window lists the exhibit location and the name and location of the linked file. The name and location is hyperlinked to the file.

You can also click Open linked document in the Exhibit Tasks panel.

6. Click the hyperlink to view the file in its native application.

7. When you are finished viewing the file, click **Close**.

Related Topics

About exhibits
Linking exhibits to transcripts
Adding/changing file viewers
Importing exhibit packages

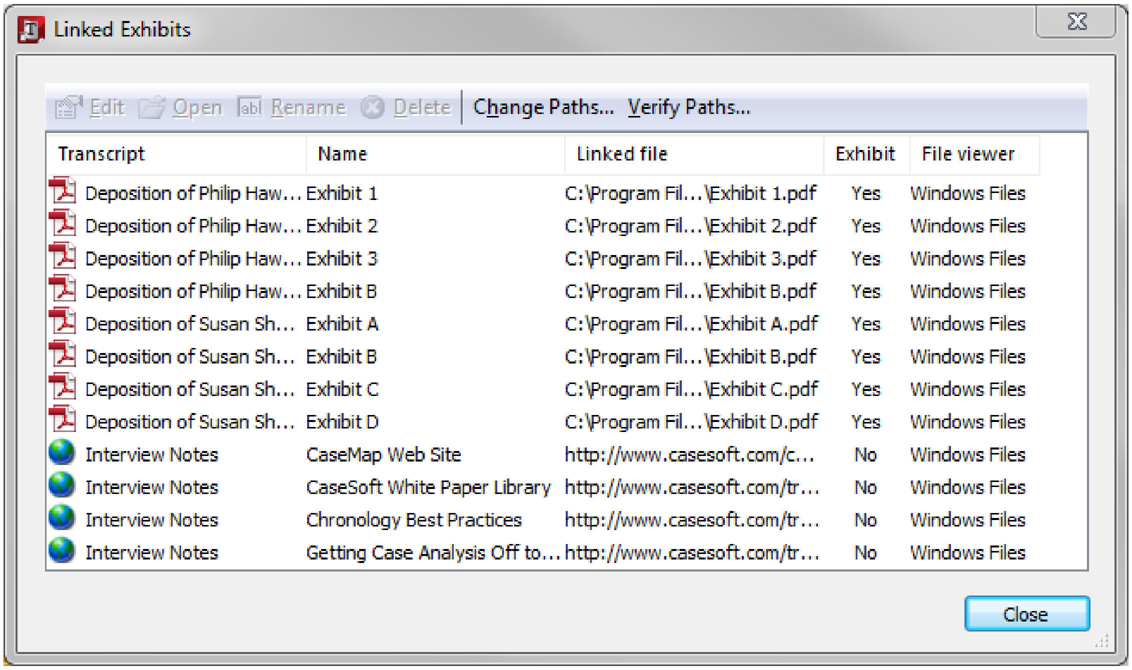
Editing exhibits

Editing exhibits involves editing exhibit properties, renaming a linked exhibit, adding words or phrases to automatically link to previously non-hyperlinked exhibits, deleting a linked exhibit, changing exhibit file paths, and verifying linked exhibits.

To edit a linked exhibit

1. On the **Case Tools** ribbon, click **Linked Exhibits**.

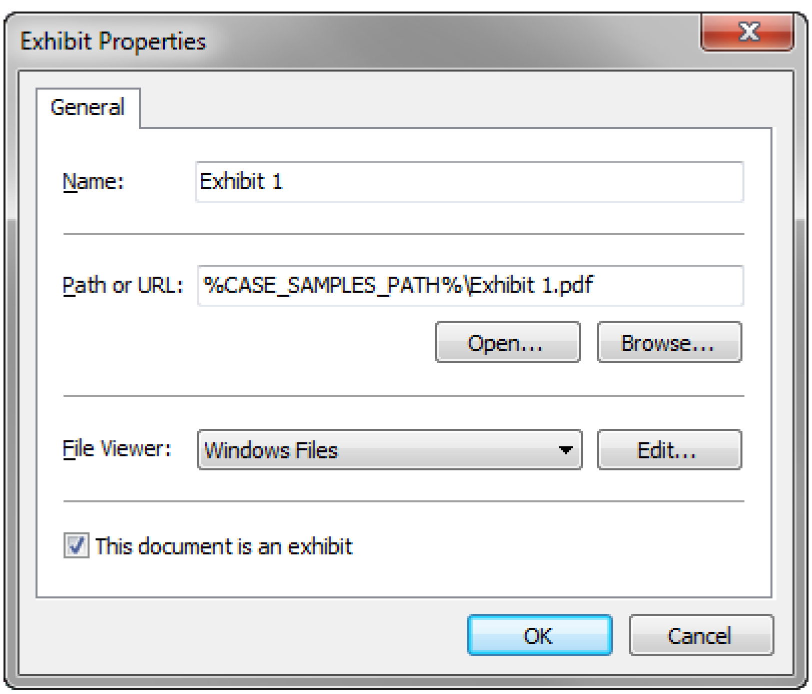
2. In the **Linked Exhibits** dialog box, select the linked file you want to edit.



3. On the **Linked Exhibits** toolbar, click **Edit**.

   You can also right-click on the linked file you want to edit, and then click Edit.

4. In the **Exhibit Properties** dialog box, edit the exhibit properties as needed.



5. In the **Name** field, edit the name of the linked exhibit.

6. Under **Path or URL**, click **Open** or **Browse** to view a linked exhibit file path.

7. In the **File Viewer** list, click on the file viewer you want to use to view the file.

8. Click the **Edit** button to add, remove, edit, or change the default file viewer.

9. Select or clear **This document is an exhibit** check box as needed.

   If an exhibit is not marked as an exhibit, then it will display under Other Linked Documents in the Exhibits pane.

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

To rename a linked exhibit

1. On the **Case Tools** ribbon, click **Linked Exhibits**.

2. In the **Linked Exhibits** dialog box, select the linked exhibit you want to rename.

3. On the **Linked Exhibits** toolbar, click **Rename**.

   You can also right-click on the linked file you want to rename, and then click Rename.

4. In the **Rename Exhibit** dialog box, type in the new name, then click **OK**.

5. In the **Linked Exhibits** dialog box, click **Close**.

To delete a linked exhibit

1. On the **Case Tools** ribbon, click **Linked Exhibits**.

2. In the **Linked Exhibits** dialog box, select the linked exhibit you want to delete.

3. On the **Linked Exhibits** toolbar, click **Delete**.

   You can also right-click on the linked file you wan to delete, and then click Delete.

4. In the message box, review the number of hyperlinks and annotations affected.

5. Click **OK** to delete the exhibit.

6. In the **Linked Exhibits** dialog box, click **Close**.

Related Topics

About exhibits
Linking exhibits to transcripts
Viewing exhibits
Verifying linked exhibits
Changing exhibit file paths

Verifying linked exhibits

The Verify Paths tool checks that all linked exhibits are accessible in the selected file viewer. A message displays indicating files successfully verified and lists the number of linked exhibits and any linked files that were not checked because they are not local or network files.

TextMap cannot verify web site addresses. If there is a problem with the linked file path, the Status field will display "This file was note found".

To verify linked file paths

1. On the **Case Tools** ribbon, click **Linked Exhibits**.
2. In the **Linked Exhibits** dialog box, click **Verify Paths**.
3. In the message box verifying completion, click **OK**.

Related Topics

Creating single hyperlinks in transcripts
Changing exhibit file paths

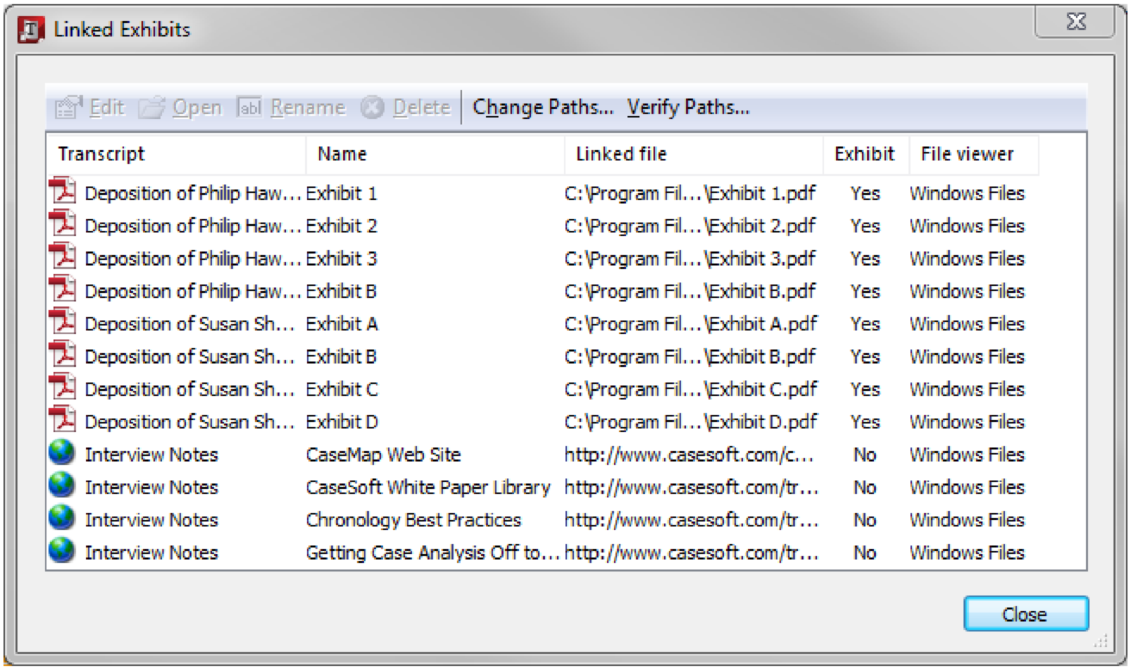
Changing exhibit file paths

Linked exhibits and other case files should be stored in a network folder so other case users can access them. You can change the file paths using the Change Path Wizard, which will change all matching paths to the new path so that links in the case will open specified documents.

⚠ We recommend you make a backup copy of the case before making any global changes, like changing linked file paths. Once the process is completed, you cannot undo the changes without restoring a backup copy of the case.

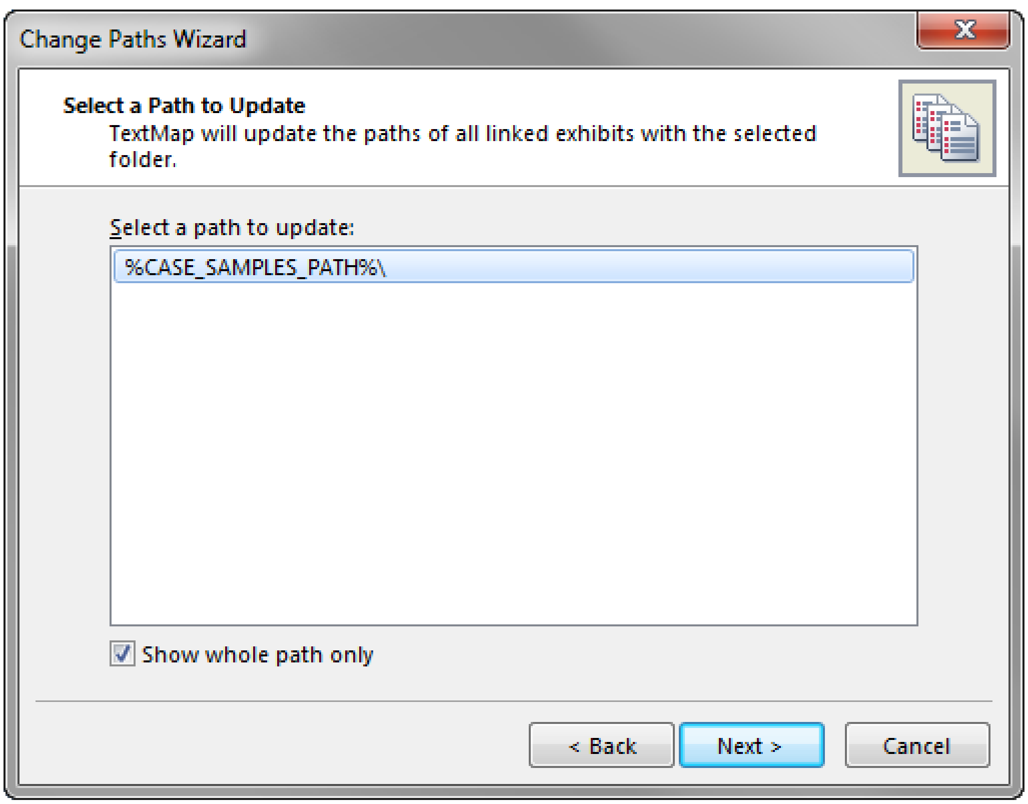
To change exhibit file paths

1. On the **Case Tools** menu, click **Linked Exhibits**.
2. In the **Linked Exhibits** dialog box, click **Change Paths**.



3. On the **Change Paths Wizard's Welcome** page, click **Next**.

4. On the **Select a Path to Update** page, select the path you want to update.



Select the Show whole path only check box if you prefer to change the whole file path at once.

5. Click **Next** to continue.

6. On the **Enter a New Path** page, click **Browse** navigate to the folder where the files are now stored, then click **OK**.

7. On the **Enter a New Path** page, click **Next**.

8. On the **Completing the Change Paths Wizard** page, review the previous and new folder paths, then click **Finish**.

9. In the **Linked Documents** dialog box, click **Close**.

Related Topics

About exhibits
Linking exhibits to transcripts
Creating single hyperlinks in transcripts
Changing the case exhibits path

Changing the case exhibits path

Exhibit files and other case files should be stored in a network folder so other case users can access them.

For local cases, TextMap automatically imports exhibits files to a subfolder where the case file is stored. If you move the exhibits folder along with the case file, the imported exhibits link will still work. See Changing exhibit file paths.

For SQL cases, you specify the network folder where you want to store exhibit files in the Case Properties dialog box. You must have permission granted in the CaseMap Admin Console to use this feature.

To change the exhibits path folder for SQL cases

1. On the **File** menu, click **Case Setup**, and then click **Case Properties** to open the **Case Properties** dialog box.

   The current folder path for exhibits displays in the **Exhibits Path** box.

2. Click the **Modify** button to change the folder path.

3. In the **Browse for Folder** dialog box, navigate to the folder where you want to save exhibit files, then click **OK**.

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

Related Topics

[Entering case properties]
[Importing exhibit packages]
[Changing exhibit file paths]

Working with Video

About videos

You can import video files like any other transcript in TextMap. When the import is complete the transcript displays in the Transcript List with a video icon that is different than the icon for text-only transcripts.

Videos play in TextMap with a cursor scrolling through the text in synch with the video because there are three components working at the same time: a video file (an .mpeg or .wmv), a text file, and a file with synchronization information.

You can search and annotate video transcripts just as you have done with other transcripts in the case. In addition, you can use the Edit Video dialog box to make a snippet associated with an annotation a little shorter or longer.

Before you can play back transcript video in TextMap, you must first have the transcript synchronized with the video. TextMap does not synchronize the video and the transcript for you. Usually your court reporter or videographer can perform the video synchronization service for you. When you schedule a video deposition with court reporters, make sure to ask if they can perform the video synchronization service and provide the synchronized transcript in a format that TextMap can import.

Learn about video file types you can import

Reference the following table for a list of the standard formats for importing transcripts with synchronized video that are supported by TextMap.

Import Video Files Types		
File Types	**File Extensions**	**Description**
Sanction (preferred)	.mdb	Most video synchronization service providers should be able to produce this format. *.mdb files have the text and synch information that TextMap needs. You will need the video file for the transcript too.

Import Video Files Types		
File Types	**File Extensions**	**Description**
YesLaw CDs (preferred)	*.mdb and *.vid	YesLaw CDs include both the *.mdb and *.vid files. TextMap looks automatically for video files to play on your CD drive.
LiveNote Portable Transcript Format with Video	*.ptf and *.vid	Most video synchronization service providers should be able to produce this format. You can also get this format from exporting from LiveNote or TextMap. *.ptf files have the text and a *.vid file with synch info for an individual transcript that TextMap needs. You will need the video file for the transcript too. *.ptf files can imported as you would import a text (.txt) file. TextMap automatically imports the video (.vid) format and the synchronization information.
TextMap Exhibit Packages	*.xmef	TextMap Exhibit Packages can be created from an *.mdb and *.ptf-sw with *.vid. *.xmef files made with TextMap Exhibit Linker from video transcript .mdb or .ptf files include transcript text, hyperlinked exhibits, and video synch data. You will need the video files for the transcripts too.
Portable Case Format	*.pcf	You can get this format by exporting from LiveNote or TextMap. *.pcf files have the text and synch info that TextMap needs for more than one transcript. You will need the video files for the transcripts too.
Esquire Video Project	*.evp	Esquire Video Project files include the following: transcript text with video time stamps, transcript videos, and exhibit links. The exhibit files are not stored in the *.evp file. If the *.evp file is on a CD, the exhibit files should be in an Exhibits folder on the CD. The exhibits can be imported into TextMap separately using the normal exhibit linking process. For more information on exhibit linking, see Auto Link Exhibit Wizard and TextMap Exhibit Linker.

TextMap does not support importing LiveNote Exhibit Format (*.lef).

If you have a text file and a video that are not synchronized into a Sanction *.mdb file for import, you can contact a company that can combine the video recording of the deposition and the transcript into the Sanction format. Look for a company that advertises video depositions or multi-media depositions.

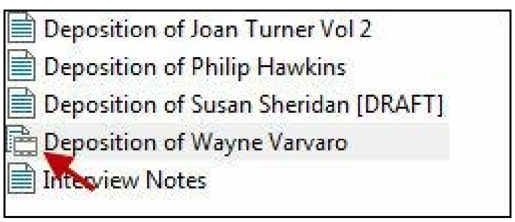
It is not possible to simply import a video file from a camcorder. TextMap requires a video file, a text file, and time coding information in order to synchronize video with text. Sanction .mdb files contain each of these.

Related Topics

Importing video files
Playing videos
Annotating videos
Editing videos
Changing search options for videos
Changing video file paths

Importing video files

Import video files just as you would import a transcript or other file into your TextMap case. When the import is complete, the transcript displays in the Transcript List with a video icon that is different than the icon for text-only transcripts.

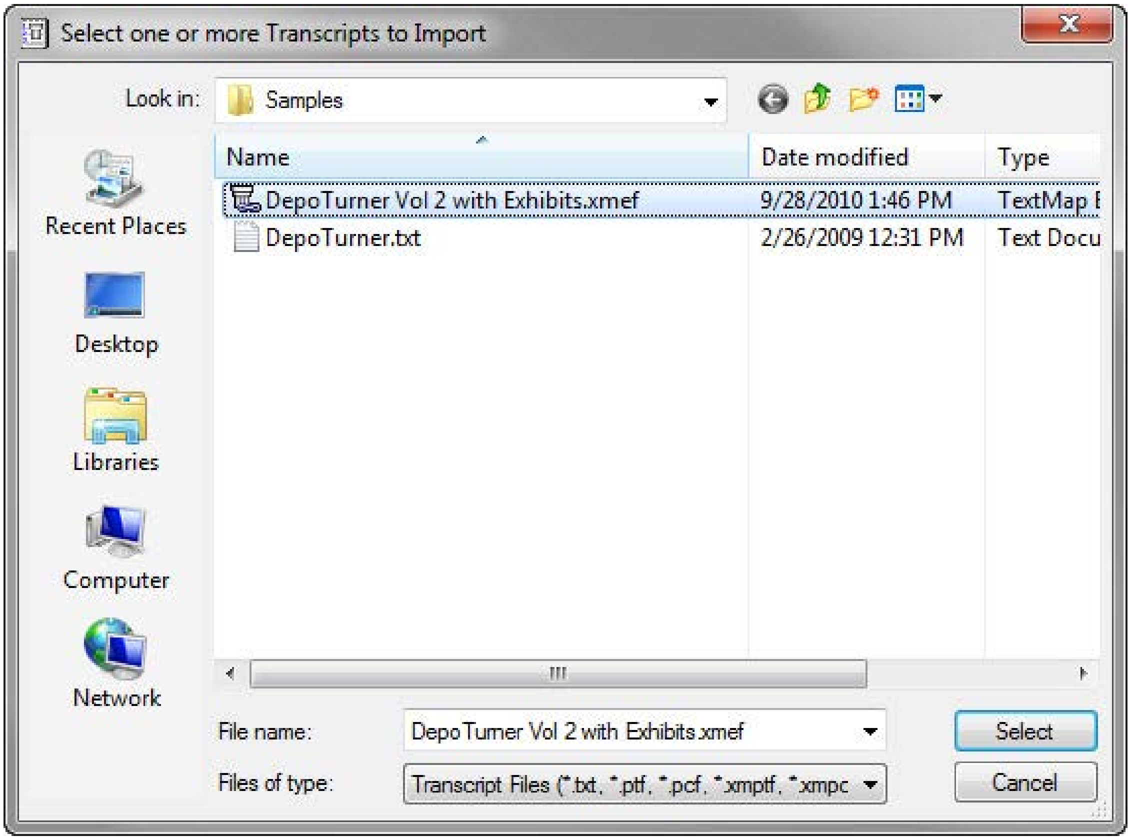


To import videos

1. On the **TextMap** toolbar, click the **Import Transcripts** button.

   You can also click the File menu and then click Import, and then Import Transcripts.

2. In the **Select one or more Transcripts to Import** dialog box, navigate to the location where the files you want to import are saved.

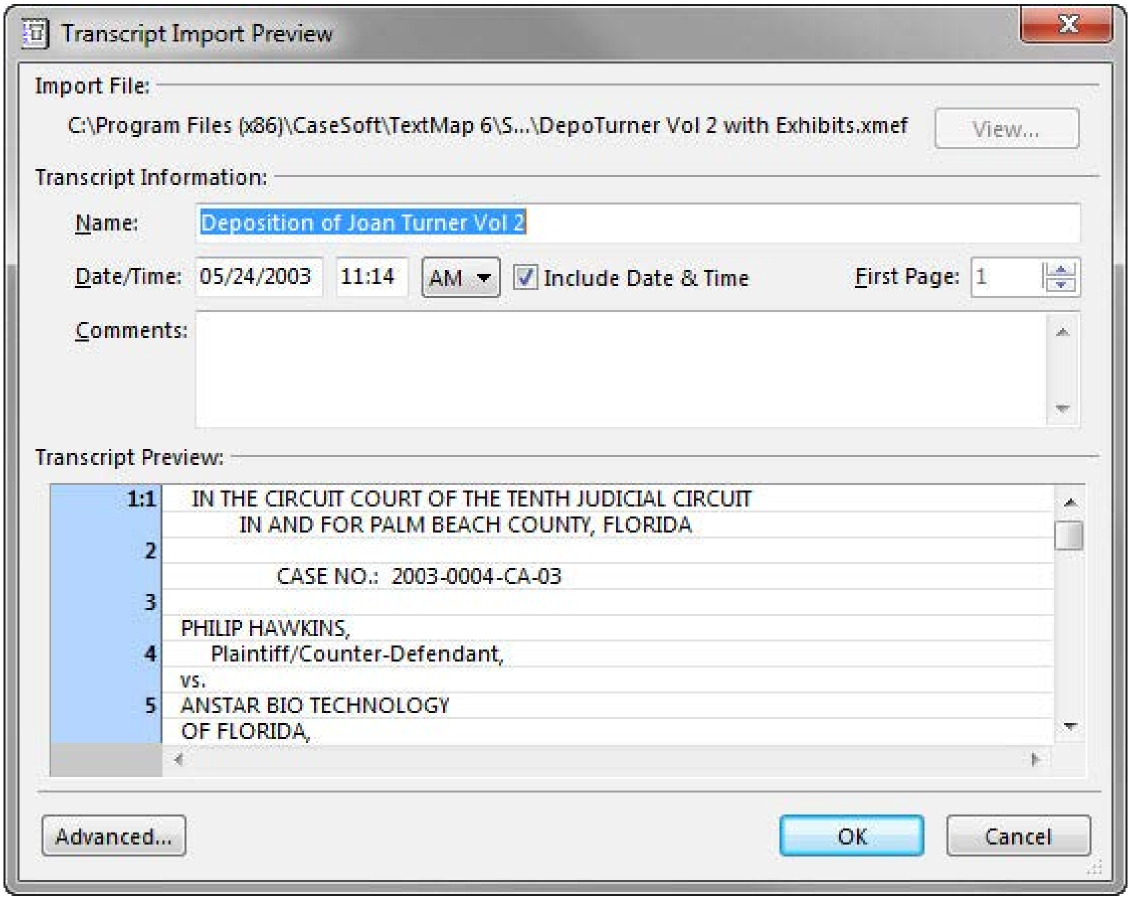


3. In the **Files of type** list, select the file type you are importing.

4. In the **File name** box, type or edit in the name of the file.

5. Click **Select**.

6. In the **Transcript Import Preview** dialog box, review the file import information and type in any comments regarding the file.



7. Click **OK**.

Related Topics

[About videos](#)
[Playing videos](#)
[Annotating videos](#)
[Editing videos](#)
[Changing search options for videos](#)
[Changing video file paths](#)

Playing videos

Videos display in the Exhibits and Video pane in the Video task pane.

For imported .mdb, .ptf, and .pcf files, TextMap automatically looks on your CD drive for the accompanying video file when you click the Play Video button. If it doesn't find the video on your CD drive, TextMap displays a Browse for Folder dialog box for you to navigate to the folder where the files are saved. Once the file is selected, the video and synched text are ready and the video will begin to play.

If an annotation is applied to the transcript and video, you can quickly navigate to the location by right-clicking on the annotation in the Annotations pane or in the transcript text and then clicking Video and Play Video Snippet. See Annotating videos.

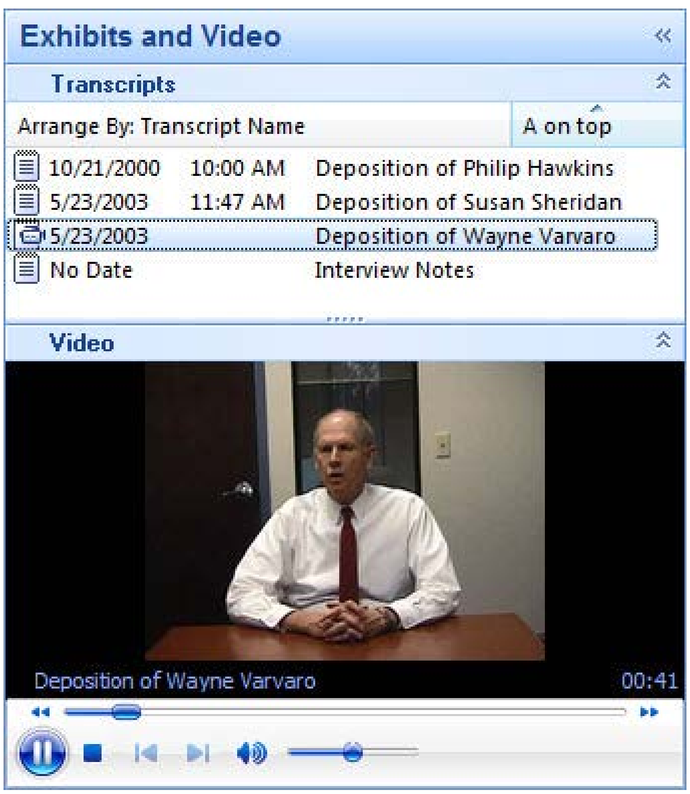
To play a video

1. In the **Navigation** pane, click on the **Exhibits and Video** button.

2. In the **Transcripts** pane, click on the video you want to play.

3. In the **Video** pane, click on the **Play** button.

You can also click the Play Video button on the TextMap toolbar.



Click on the buttons in the Video pane to stop the video or adjust the volume.

Related Topics

About videos
Importing video files
Annotating videos
Editing videos
Changing video file paths

Annotating videos

You can make annotations in the text accompanying a video transcript just as you would in a text-only transcript. Simply click and drag your mouse over the text you want annotated, then right-click on the highlighted text and select Annotate in TextMap.

Once an annotation is applied to the transcript and video, you can quickly navigate to the location by right-clicking on the annotation in the Annotations pane or in the transcript text and then clicking Video and Play Video Snippet.

For more information on annotating, see Creating annotations.

Related Topics

About videos
Playing videos
Editing videos

Editing videos

You can use the Edit Video dialog box to make a snippet associated with an annotation a little shorter or longer. You can adjust the video time in increments of one hundredths of a second. You can clear your edits from the video file any time you need to re-apply edits.

To edit a video

1. In the **Annotations** pane, right-click on the annotation associated with the video snippet and click **Video**, and then **Edit Video Snippet**.

   You can also click Video and then Edit Video Snippet on the Annotations menu.

2. In the **Edit Video Snippet** dialog box, click the **-** and **+** buttons to increase or decrease the **Start Time** and **End Time** for the video.

3. In the **Adjust By** list, clicking on the arrow list to click on the time adjust you want to make.

4. Click **Play Snippet** to view the video excerpt to see the time adjustment.

   Click Reset to Default if you need to clear your edits from the video and re-edit it.

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

Related Topics

[About videos]
[Importing video files]
[Playing videos]
[Annotating videos]

Exporting videos

Export video files just as you would export a transcript or other file from your TextMap case.

To learn about files you can export

Reference the following table for a list of the standard formats for exporting transcripts with synchronized video that are supported by TextMap.

Import Video Files Types		
File Types	**File Extensions**	**Description**
LiveNote	*.pcf and *.ptf	Portable Transcript Format (*.ptf) is a file format for a single transcript that can be imported into LiveNote® Stream. Portable Case Format (*.pcf) is a file format for a single transcript or multiple transcripts that can be imported into LiveNote®. Both *.ptf and *.pcf files contain the text and all annotations. TextMap creates a *.vid file with associated video synchronization information to go along with the *.ptf and *.pcf files.
Sanction	*.mdb	*mdb is a file format for a single transcript that can be imported into Sanction®.
Amicus, Summation, and Page Image Format	text or *txt	Text files are formatted for single transcript that contains all text. Amicus *txt is a format that can be imported into Amicus® Attorney. Summation *.txt is a format that can be imported into Summation®.

To export a video

1. In the **Transcripts** pane, right-click the video transcript you want to export and then click **Export Transcript**.

   You can also click More Export on the Home Ribbon, and then click Export to Portable Case Format.

2. In the **Select Name, Location, and Type for Exported Transcript** dialog box, navigate to the folder where you want to save the export file.
3. In the **File** name field, type or edit the name of the export file.
4. In the **Save as type** list, click the file type you want for the export (e.g., Portable Case Format (*pcf)).
5. Click **Save**.
6. In the Export Case dialog box, if groups have been created, then select an applicable location/group, and then click **OK**.

7. In the message box, click OK to acknowledge the location of the saved file.

Related Topics

About videos
Importing video files
Exporting video clips

Exporting video clips

Video clips can be any selected text in a transcript or annotations made of video transcripts during review. To identify video clips you want to export, you can read the transcripts or search them using TextMap's Search functions. Or you can review the Annotations pane to find a desired passage by scanning your notes, linked issues, linked facts and text highlights for a selected transcript.

You can export the clip to a media file, insert it into an existing PowerPoint presentation, or put it into a new PowerPoint presentation. Exporting to PowerPoint requires version 2002 or higher. Although the default location for saved *.wmv, *.mpg and *.mp4 files are My Media\My Videos, TextMap also allows you to determine where you want to save exported video clips.

You will need Windows Media Encoder version 9 or higher to export clips. You may have installed the encoder as part of TextMap's Install Wizard. If not, TextMap will look for the encoder on your computer when you try to export a clip. If you don't have Windows Media Encoder, TextMap provides a link to a Microsoft Downloads page where you can get more information about the free component and download it.

TextMap can optionally use the FFmpeg encoder to export clips to the .wmv, .mpg, and .mp4 format. You can set the option to export to these formats in the Options tabs. See Changing case options for more information.

⚠ Please note that LexisNexis makes no warranty regarding, and is not responsible for the installation or use of FFmpeg or any other third-party product or software code.

If you are exporting a video clip to a Microsoft PowerPoint presentation, the video clip displays on a slide with a page/line reference and all text from the annotation, along with an image of the first frame of the video clip.

TextMap has options to export video clips to a new or existing PowerPoint file. You can select and preview the following presentation format preferences:

- Video Format (WMV, MPG or MP4)
- Video Position (Left, Right, Above or Below transcript text)
- Include Transcript Title

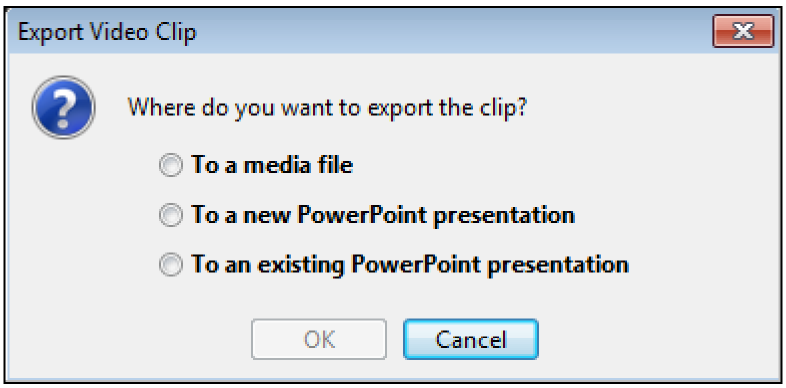
TextMap saves exported clips as media files in the same location as the presentation. Double-click the image in PowerPoint's Normal mode or click on it in Presentation mode to play the video.

To export video clips

1. In the **Annotations** pane, right-click the annotation that you wish to export, click **Video,** and then click **Export Clip**.

   You can also right-click the color annotation in the transcript and then click **Video** and **Export Clip**.

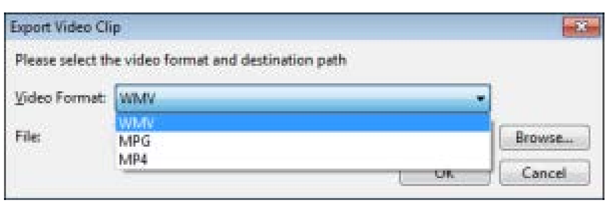
2. In the **Export Video Clip** dialog box, select the option you want.

3. Click **OK**.

   To a Media File

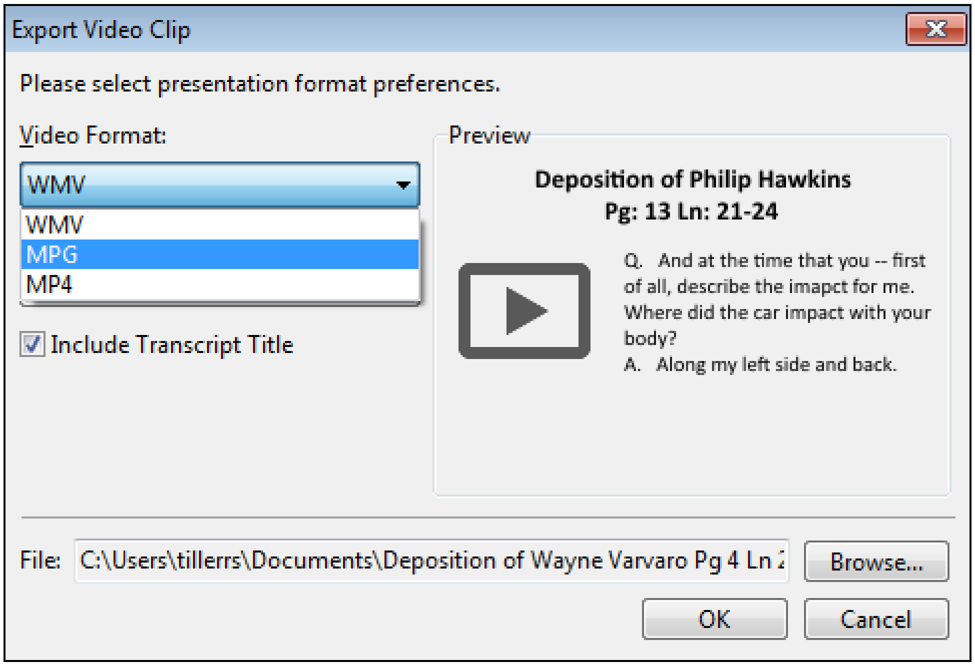
   1. In the **Export Video Clip** dialog box, click the list under the **Video Format** header and select one of the options.

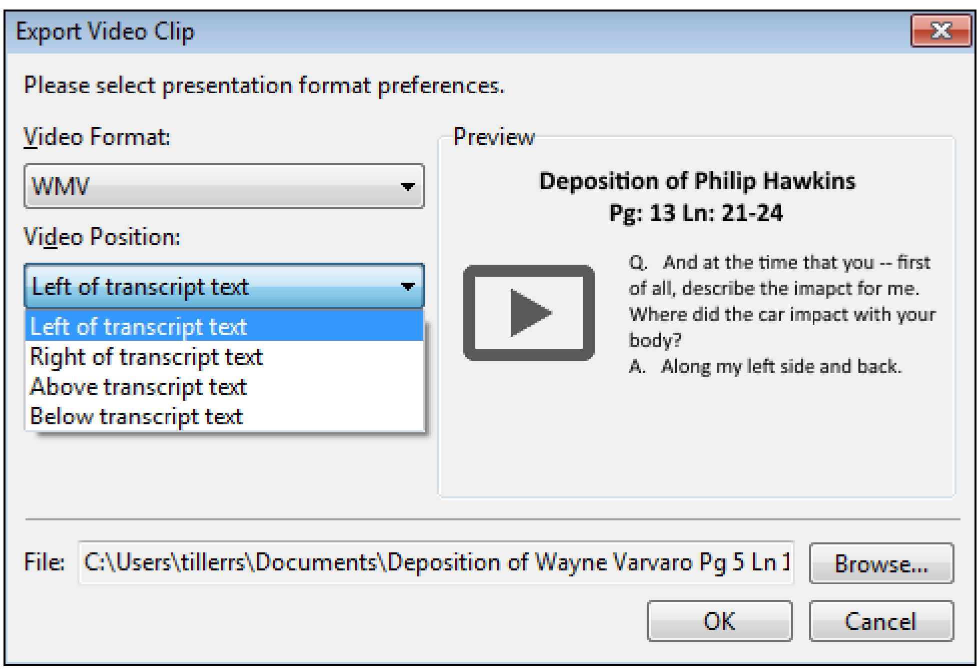
   2. Click **Browse** and navigate to the folder where you want to save the file.
   3. Click **Save**.
   4. In the message box, click **OK**.

   To a new PowerPoint presentation

   1. In the **Export Video Clip** dialog box, click the list under the **Video Format** header and select one of the options.



2. In the **Export Video Clip** dialog box, click the list under the **Video Position** header and select one of the options.



3. Select or clear the option to **Include Transcript Title**.

If setting preference for the first time, this is selected by default.

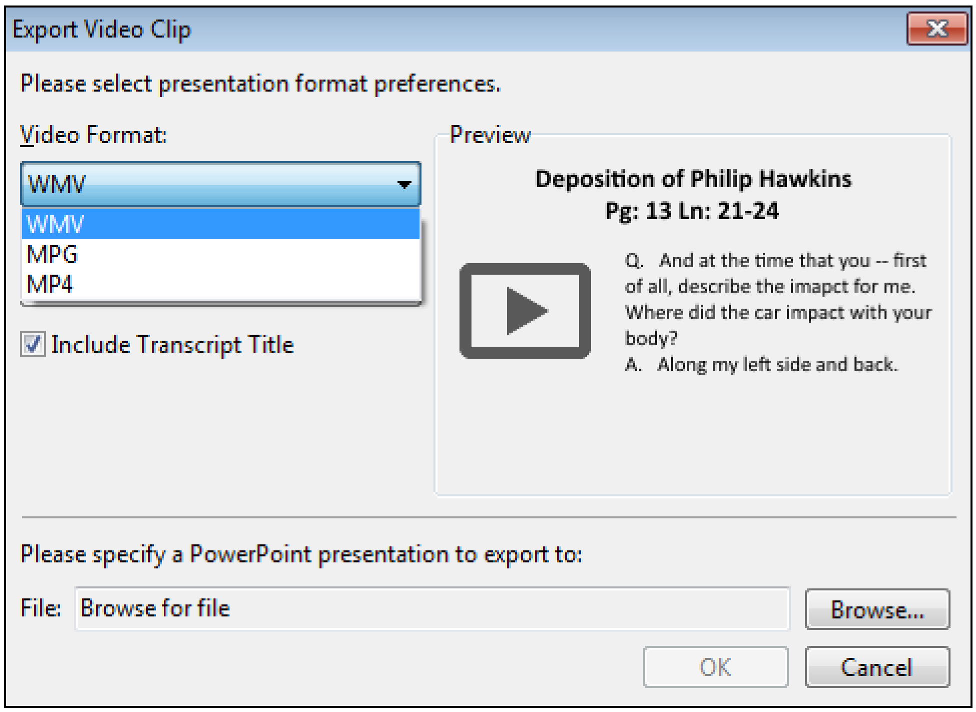
The selections will appear in the Preview area of the dialog box.

4. Click **Browse** and navigate to the folder where you want to save the file.
5. Click **OK**.

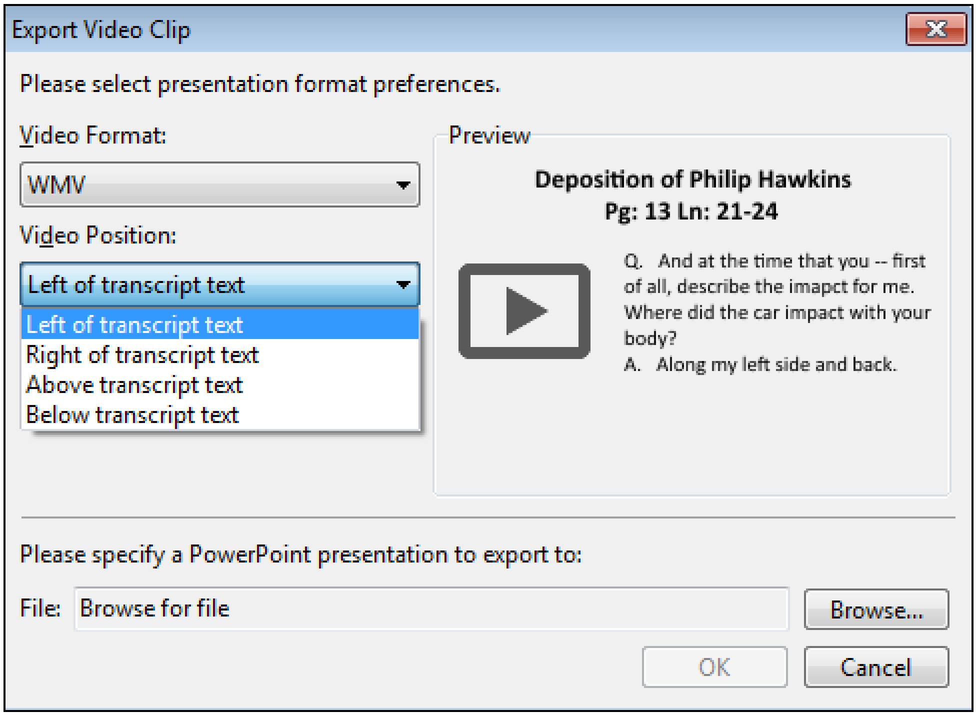
   The exported clip is opened as a new slide in the PowerPoint presentation.

To an existing PowerPoint presentation

1. In the **Export Video Clip** dialog box, click the list under the **Video Format** header and select one of the options.



2. In the **Export Video Clip** dialog box, click the list under the **Video Position** header and select one of the options.



3. Select or clear the option to **Include Transcript Title**.

If setting preference for the first time, this is selected by default.

The selections will appear in the Preview area of the dialog box.

4. In the **Please specify a PowerPoint presentation to export to** area, click **Browse** and navigate to the folder of the existing PowerPoint file.

5. Select the file.

6. Click **Open**.

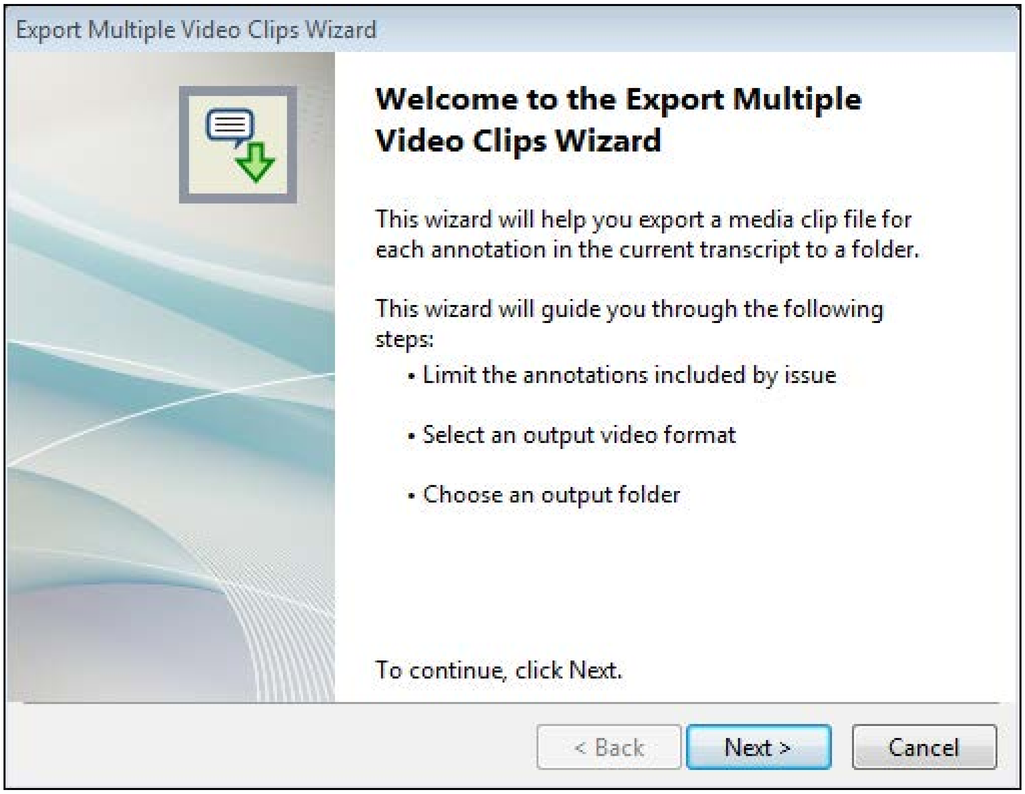
The exported clip is added to a new slide in the presentation.

To export multiple video clips all at once

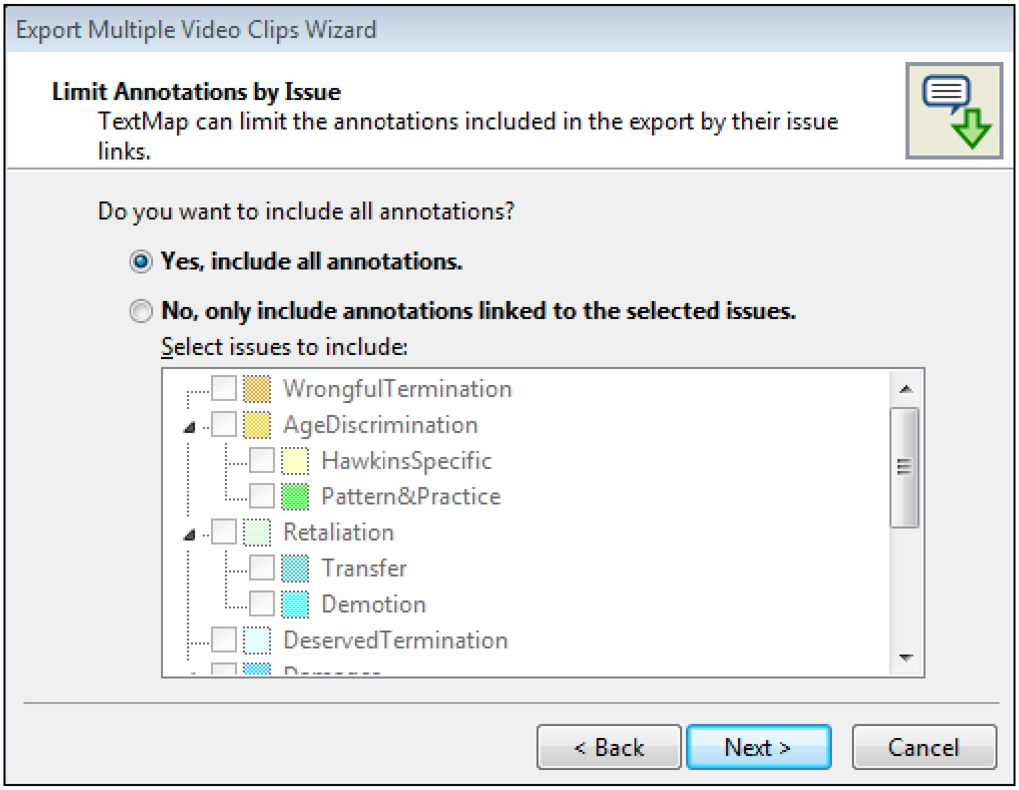
1. In the **Annotations** pane, right-click the annotation that you wish to export, click **Video**, and then click **Export Multiple Clips**.

You can also right-click the color annotation in the transcript, or click the Annotations menu, click Video, and then click Export Multiple Clips.

The Export Multiple Video Clips Wizard displays.



2. In the **Export Multiple Video Clips** wizard, click **Next** to open the **Limit Annotations by Issue** dialog box.



3. Select one of the following:

   To include all annotations

   a. Select the **Yes, include all annotations** check box to export all annotations.

   b. Click **Next**.

   To include only annotations linked to issues

   a. Select the **No, only include annotations linked to the selected issues** check box to include only the annotations that are linked to the issues that are selected here.

   b. In the **Select issues to include** area, select the check box(es) for all annotations to be included in the export.

   c. Click **Next**.

> If you have enabled the use of FFmpeg encoder to export multiple output formats, the following option is available. If not enabled, skip to step 6.

4. In the **Export Multiple Video Clips** wizard, select one of the following output formats for the video clips:

   - **Windows Media Video (.wmv)**

- **MPEG-2 (.mpg)**
- **MPEG-4 (.mp4)**

5. Click **Next**.

6. In the **Output Destination** dialog box, click **Browse** to locate a storage location/ folder for the exported file.

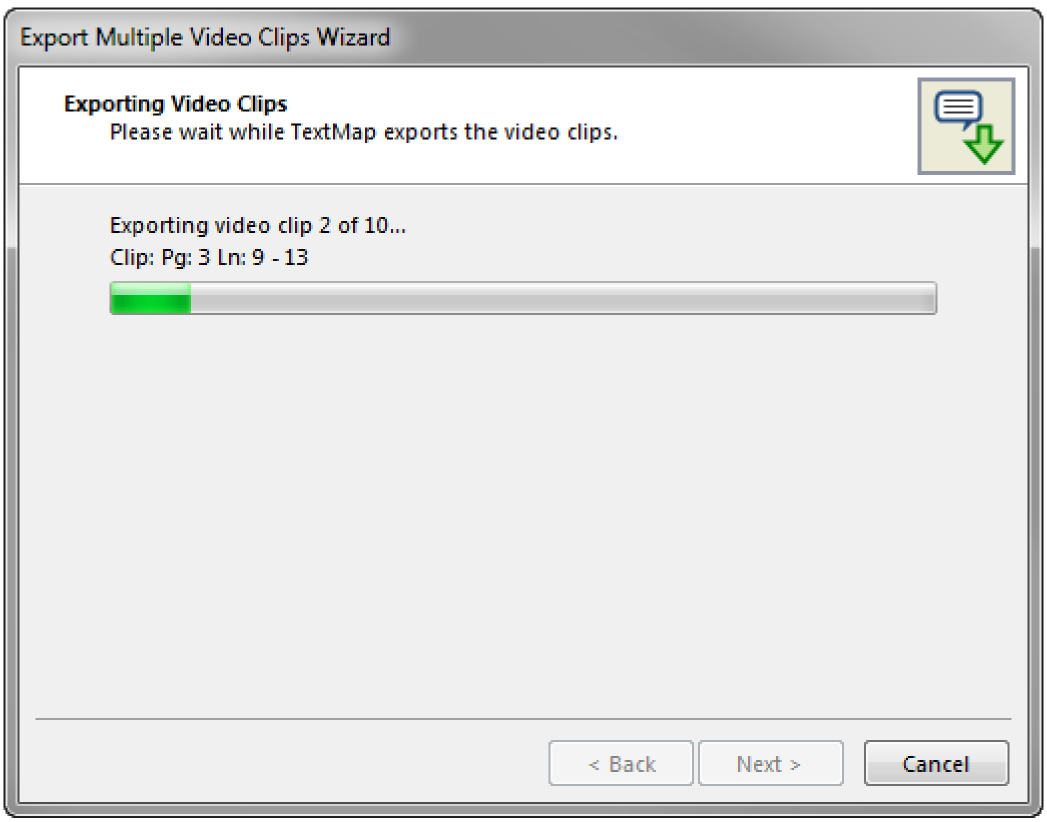
7. In the **Browse For Folder** dialog box, click **OK**.

   The Export Multiple Video Clips Wizard opens, displaying the location/path of the exported files.

8. Click **Next** to export the video clips.

   The Exporting Video Clips screen displays.

   Please wait while TextMap exports the video clips.



9. Optional: In the **Exporting Video Clips** window, click **Cancel** to stop the export.

10. In the **Completing the Export Multiple Video Clips** wizard, click **Finish**.

    TextMap completes the export and stores the file(s) in the selected folder. It makes the name of each file unique by adding a number to the end of it (e.g., Deposition of Wayne Varvaro Pg 4 Ln 6 - 7 (2).wmv), where (2) is the unique identifier.

To save clips to a flash drive or CD

If you have a number of clips it may not be practical to email the presentation and clips. In that case, using a USB drive or burning the presentation and related *.wmv files to CD may be a better option for you. This options also allows you to transfer a PowerPoint presentation from your office computer to a laptop, if need be.

You can move saved *.wmv file clips by copying them onto portable storage media like a USB flash/thumb drive or CD. If you saved the files to the default location the clips will be in My Media/My Videos.

When you move a PowerPoint presentation with clips make sure you take along the exported video files (*.wmv) that are in the same folder with the presentation file. The video files will have names like "Deposition of Wayne Varvaro Pg 5 Ln 13 - 18.wmv". Save the presentation and associated videos in the same folder.

Your presentations and clips will play from a CD or USB drive.

Related Topics

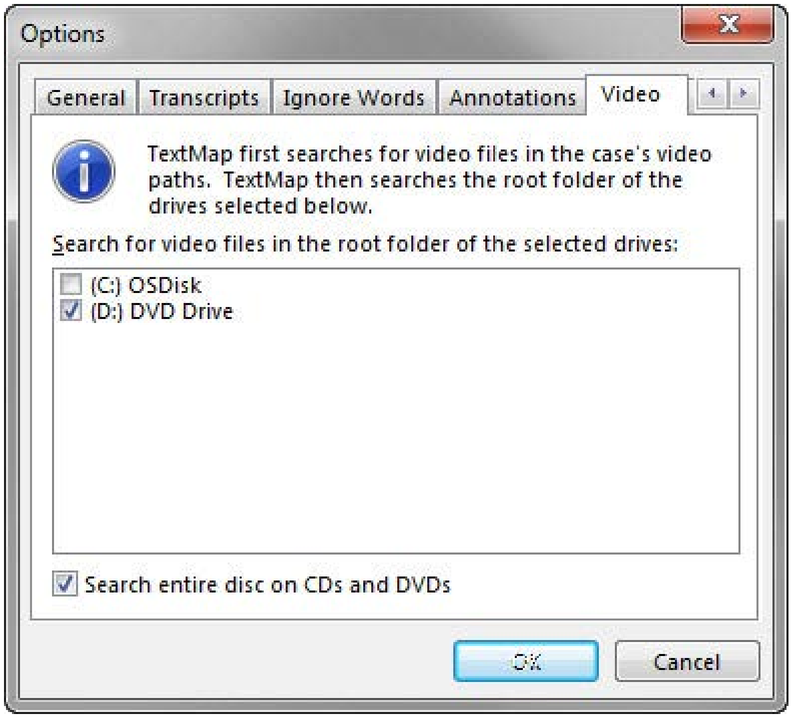
About videos
Importing video files
Exporting videos

Changing search options for videos

TextMap checks your CD drive by default for video files. You can change the drive that is first used to locate video files. TextMap remembers the location of the video (the file path).

To change the search options for videos

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click the **Video** tab.



3. In the box, select the drive that you want TextMap to search first for video files, beginning with the root folder.

4. Select or clear the **Search entire disc on CDs and DVDs** option, depending on your needs.

   This option is enabled by default.

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

Related Topics

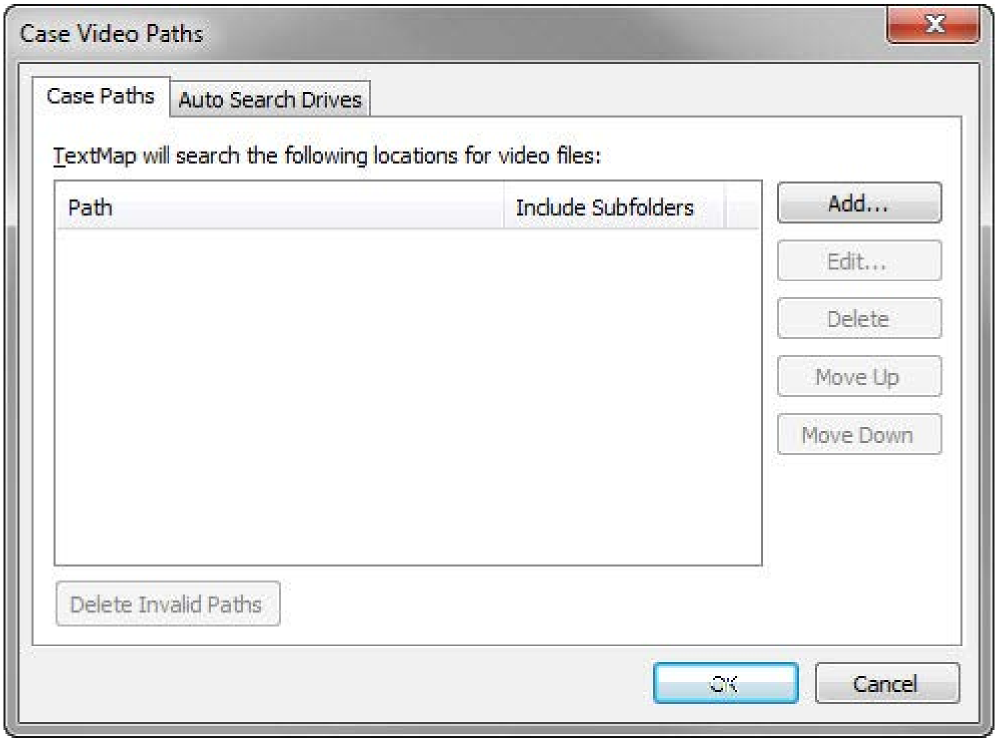
[About videos](#)
[Importing video files](#)
[Changing video file paths](#)

Changing video file paths

The video path is where TextMap looks for video files. The Case Video Paths dialog box allows you to add additional file paths to search other locations on your system or network where videos might be stored.

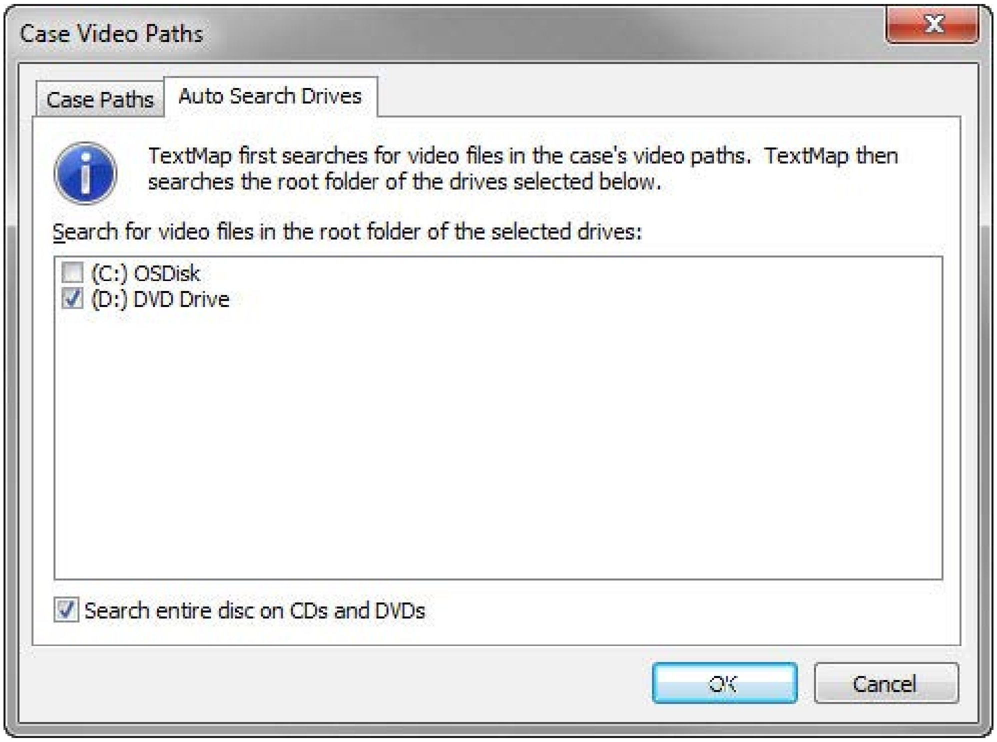
To add or change video paths

1. On the **File** menu, click **Case Setup**, and then click **Case Properties**.
2. In the **Case Properties** dialog box, click **Video Paths**.
3. On the **Case Video Paths** tab, click **Add** to add another location for TextMap to search.



You can organize this list and edit it as needed.

4. On the **Auto Search Drives** tab, select or clear check boxes for drives you want to search for video files.



The DVD Drive and Search entire disc on CDs and DVDs check boxes are selected by default.

5. Click **OK** to save any changes.

Related Topics

[About videos]
[Changing search options for videos]

Editing Data

About editing data

TextMap offers a variety of ways you can edit case data. Once data is edited, it is saved and permanently changed in the case.

Editing field data involves:

- Spell checking annotation notes
- Finding words in transcripts

- Copying transcript text
- Locating the page/line number in a transcript
- Inserting and deleting data and transcripts

  See Deleting transcripts and Deleting annotations.
- Changing exhibit and linked file paths

  See Changing exhibit file paths and Changing linked file paths.

Related Topics

Using spelling tools
Finding and replacing data
Copying data
Using the Go To feature
Changing exhibit file paths
Changing linked file paths

Using spelling tools

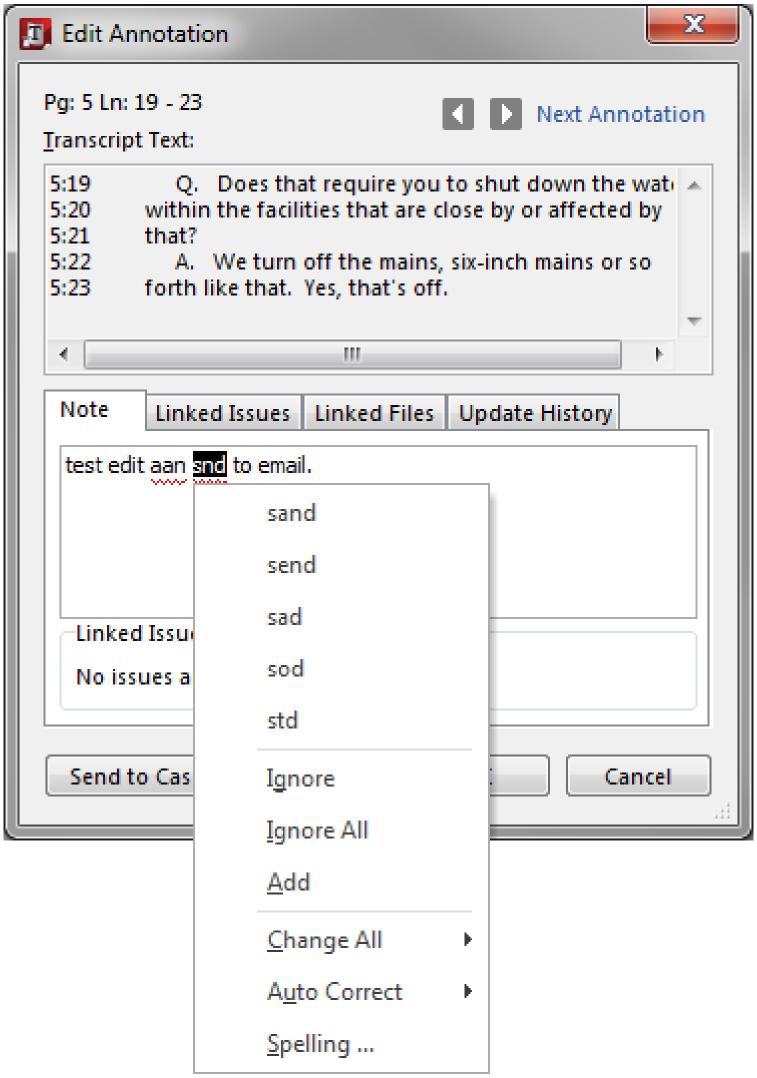
TextMap offers live spell checking when you type in annotation notes.

You can access Spelling options and settings in the Notes tab of the New Annotation or Edit Annotation dialog box.

To use the spelling tool

1. In the **New Annotation** or **Edit Annotation** dialog box, right-click on a misspelled word.

   Misspelled words display with a red underline.



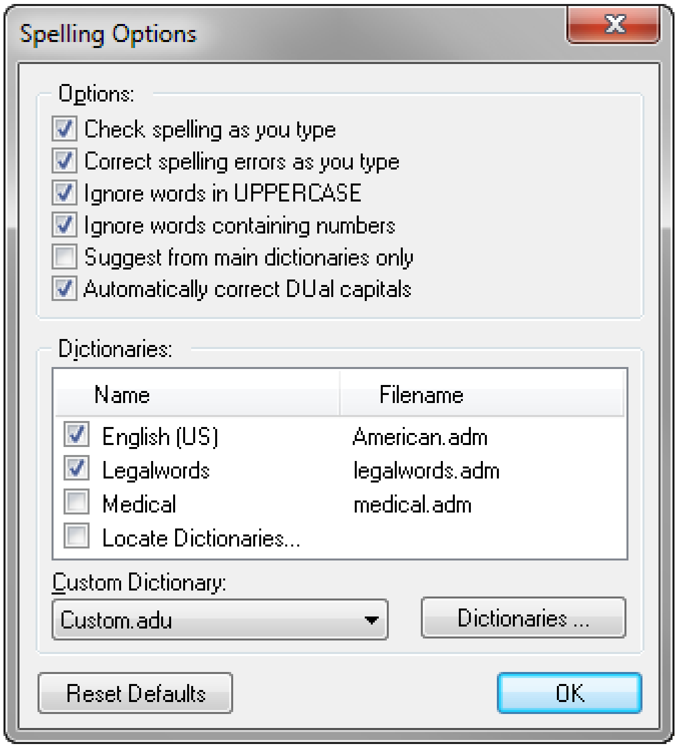
2. Right-click on the misspelled word and click the correct word from the list or choose one of the following:
    - Click **Ignore** to ignore one instance of the word as you have it spelled.
    - Click **Ignore All** to ignore all instances of the word as you have it spelled.
    - Click **Add** to add the word to the case dictionary.
    - Click **Change All** or **Auto Correct** and then click the correct spelling to change all instances of the word or automatically correct the word if misspelled in the future.
    - Click **Spelling** to access these options in the Spelling dialog box.
3. Click **OK** to save your changes.

To change spell check options

1. In the **New Annotation** or **Edit Annotation** dialog box, right-click on a misspelled word.
2. Right-click on the misspelled word and click **Spelling**.

3. In the **Spelling dialog** box, click the **Options** button.

4. In the **Spelling Options** dialog box, select or clear the check boxes for the options you want to include.



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

6. Click the **Reset Defaults** button to reactivate spelling default settings.

To change or add a new dictionary

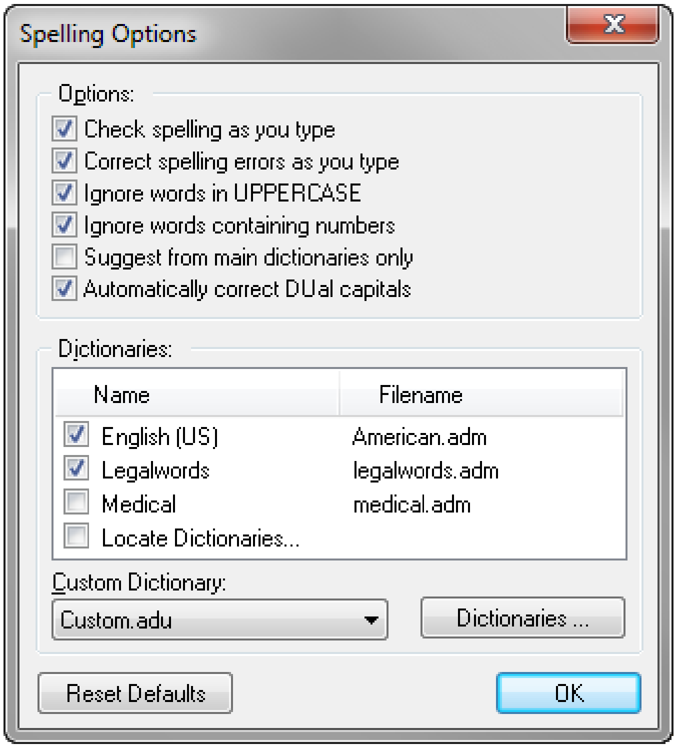
TextMap is automatically configured to use a dictionary. You can also add additional dictionaries, like a medical dictionary, as needed.

1. In the **New Annotation** or **Edit Annotation** dialog box, right-click on a misspelled word.

2. Click **Spelling**.

3. In the **Spelling dialog** box, click the **Options** button.

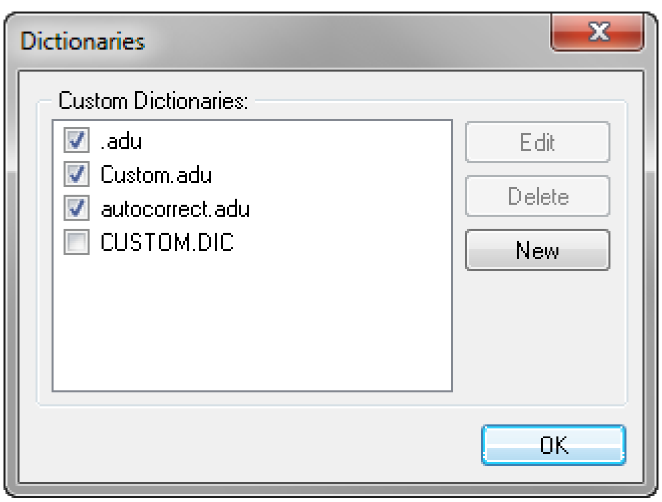
4. In the **Spelling Options** dialog box under **Dictionaries**, select the check box for dictionaries you want turned on.



5. In the **Custom Dictionary** list, click on the dictionary you want to use as your default dictionary.

6. Click the **Dictionaries** button to add, edit, or delete a dictionary.

7. In the **New Custom Dictionary** dialog box, type in the name of the custom dictionary that is stored on your desktop or in a network folder, then click **OK**.



To add new or updated dictionaries, visit www.addictivesoftware.com.

8. Click **OK** to save the dictionary in TextMap.

9. In the **Spelling Options** dialog box, click **OK**.

10. In the **Spelling** dialog box, click **Close**.

To delete a word from the dictionary

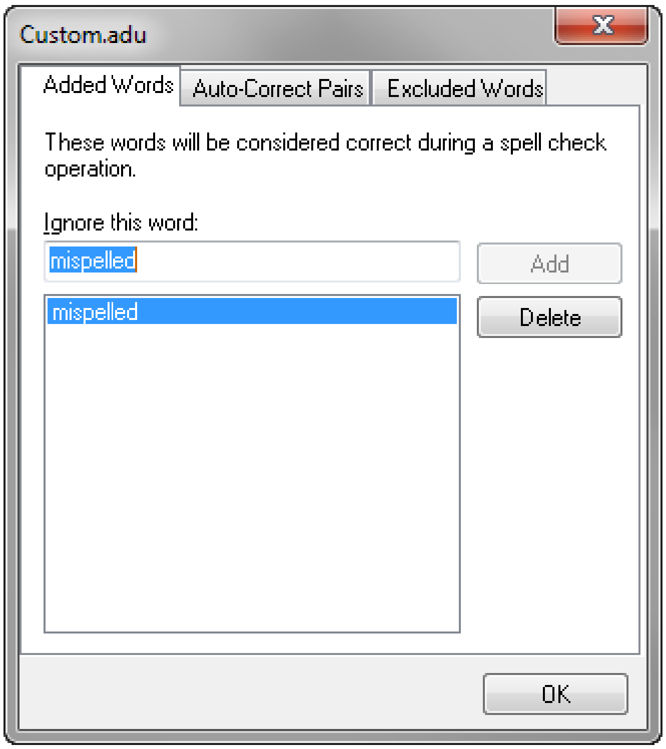
1. In the **New Annotation** or **Edit Annotation** dialog box, right-click on a misspelled word.

2. Click **Spelling**.

3. In the **Spelling** dialog box, click the **Options** button.

4. In the **Spelling Options** dialog box under **Dictionaries**, select the check box for dictionaries you want to edit.

5. In the dictionary dialog box, select the word you want to remove and click **Delete**.



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

7. In the next four dialog boxes, click **OK** or **Cancel** until all dialog boxes close.

Related Topics

[About editing data]
[Finding and replacing data]
[Copying data]

Finding words in transcripts

When you need to locate records containing a specific word or phrase, use the Find feature to search case content.

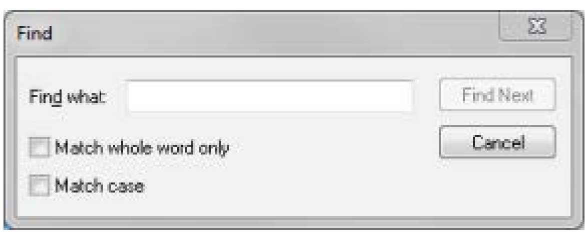
You also have the option to search for text that is case sensitive or is a particular groups of words. Selecting case sensitive provides matches of the text when certain characters are capitalized. Selecting the Match whole word only option allows you to search for a particular word or phrase. For example, if you want to find every occurrence of the whole word "John" in a field, TextMap locates all instances of both "John" and "Johnson".

When searching for data using the Find feature, you are limited to searching one transcript at a time. TextMap retains the last search you used in the Find dialog box for one user session. When you close TextMap and reopen it, the Find dialog box will be empty.

To find a word in a transcript

1. On the **Home** ribbon, click the **Find** button, and then on the submenu, click **Find**.

   You can also click the Find button on the Create & Edit tab located on the Text & Video Tools ribbon.

2. In the **Find** dialog box, type the word you want to locate in the **Find What** field.
3. Select the **Match whole word only** or **Match case** check boxes if you want to narrow the search.
4. Click **Find Next** to locate the next instance of the word in the transcript.

   You can also click the Find button on the Create & Edit tab, and then click Find Next.

5. In the message box to search the next transcript, click **Yes**.
6. Continue until you have searched all necessary transcripts, then click **Cancel**.

Related Topics

About editing data
Using the Go To feature

Copying data

You can copy text from a transcript to paste into a text file or another application, like Microsoft Word. You have the option of copying just text or text with a page/line number included.

Copy

Q. I'm going to show you Exhibit B of the Reinhart
deposition and ask you if you recognize that, and tell me
where within that unit that would be.
A. That's underneath the stairs.

Copy with page/line numbers

21:8 Q. I'm going to show you Exhibit B of the Reinhart

21:9 deposition and ask you if you recognize that, and tell me

21:10 where within that unit that would be.

21:11 A. That's underneath the stairs.

You also have the option to include the citation when copying transcript text into another text file or another application, like Microsoft Word.

Copy with citation

Q. I'm going to show you Exhibit B of the Reinhart
deposition and ask you if you recognize that, and tell me
where within that unit that would be.
A. That's underneath the stairs.

(Deposition of Susan Sheridan, 21:8-21:11, 5/23/2003 11:47:00 AM)

Copy with citation/page/line numbers

21:8 Q. I'm going to show you Exhibit B of the Reinhart

21:9 deposition and ask you if you recognize that, and tell me

21:10 where within that unit that would be.

21:11 A. That's underneath the stairs.

(Deposition of Susan Sheridan, 21:8-21:11, 5/23/2003 11:47:00 AM)

The text will be cited with the selected customized preferences and can be copied with the page/line numbers included.

To copy transcript text

1. Highlight the transcript text that you want to copy.
2. On the **Create** & **Edit** ribbon, click **Copy** or **Copy w/ page:line**.

   You can also right-click the highlighted text, click Copy, and the select Copy or Copy w/ page:line.
3. Open the application for which you want to paste the text.
4. Right-click the document and click **Paste**.

To include source when copying transcript text

Once your case is created, you can standardize the appearance of the citation according to any internal guidelines, case needs, or user preferences. The preferences are customized using the Changing case options feature.

1. On the **File** menu, click **Options**, and then click the **Clipboard** tab.
2. Click **Include source when copying transcript text**.

   If customizing for the first time, this is selected by default.
3. Select the format and position for copied transcript text, and then click **OK**.
4. Highlight the transcript text that you want to copy.
5. On the **Create** & **Edit** ribbon, click **Copy** or **Copy w/ page:line**.

   You can also right-click the highlighted text and click Copy, and the select Copy or Copy w/ page:line.
6. Open the application for which you want to paste the text.
7. Right-click the document and click **Paste**.

Related Topics

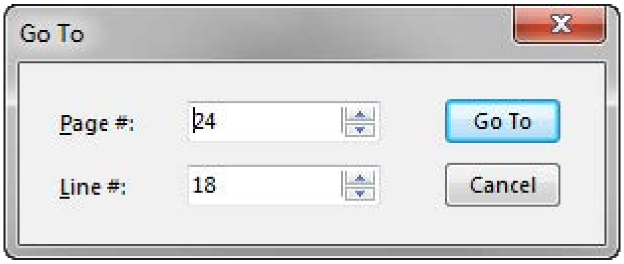
About editing data
Finding words in transcripts
Changing case options

Using the Go To feature

The Go To feature allows you to instantly locate to a page/line number in a transcript.

To locate a page/line number

1. On the **Home** ribbon, click the **Find** button, and on the submenu, click **Go To: Page/Line**.
2. In the **Go To** dialog box, type in the page and line number you want to locate.



Use the list arrows to incrementally increase or decrease numbers.

3. Click **Go To**.

Related Topics

About editing data
Finding words in transcripts

Redacting Transcripts

About redactions

TextMap allows you to redact confidential and sensitive information provided in the transcript deposition testimony.

Setting up the redaction reasons during the initial case setup is a best practice that allows you to have existing reasons ready for redaction in the case.

Once a report on the transcript is printed, any text concealed by a redaction cannot be viewed, copied, or searched. See Printing single transcripts and Printing multiple transcripts for more information on printing reports with redactions.

If you are working with SQL cases, you can set permissions for restricting modifications to redactions, redaction reasons, as well as deleting redactions in the CaseMap Admin Console. For more information, see the following topic: Creating roles in the CaseMap Server Answer Center.

Related Topics

[Managing redaction reasons]
[Redacting transcript text]
[Editing redactions]
[Overlapping existing redactions]

Managing redaction reasons

Redaction reasons are managed on a per-case level.

You can import and export redaction reasons using a text file, add and delete during the initial case setup, or when applying a redaction to selected text.

To add a new redaction reason

1. On the **File** menu, click **Case Setup**, and then click **Redaction Reasons**.
2. In the **Redaction Reasons** dialog box, click **Add**, and then type the redaction reason.
3. Click **OK** to close the dialog box.

   The new reason is displayed in the Redaction Reasons list.
4. Optional: Click **Add** to enter additional redaction reasons.
5. Click **Close** to close the **Redaction Reasons** dialog box.

To delete a new redaction reason

1. On the **File** menu, click **Case Setup**, and then click **Redaction Reasons**.
2. In the **Redaction Reasons** dialog box, select the reason you want to remove, and then click **Delete**.

   The reason is removed from the list of redaction reasons.
3. Click **Close** to close the Redaction Reasons dialog box.

To remove a redaction reason using the Delete Redaction Reason Wizard

The Delete Redaction Reason Wizard will appear when you delete redaction reasons that have been applied to transcript text.

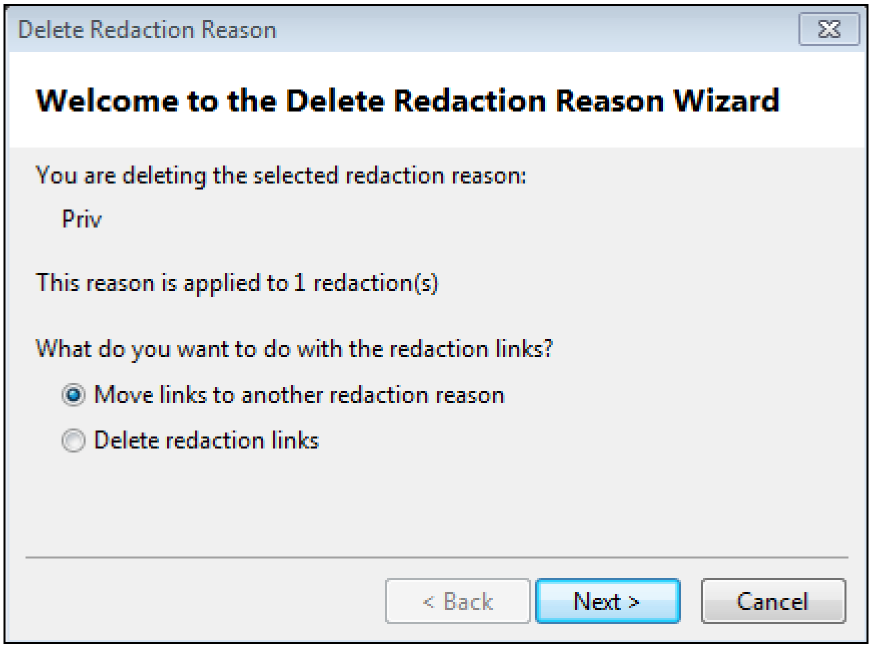
You can move the links to another redaction reason or delete the links from the transcript entirely.

⚠ Once a redaction reason is deleted, it is permanently removed from the case.

1. On the **File** menu, click **Case Setup**, and then click **Redaction Reasons**.
2. In the **Redaction Reasons** dialog box, select the reason you want to remove, and then click **Delete**.

   The redaction reason and the number of applied redactions are listed in the **Delete**

Redaction Reason Wizard.



Move links to another redaction reason

To move links to another redaction reason, do the following:

1. Select the option to **Move links to another redaction reason** and click **Next.**
2. Select the new reason where the redaction(s) will be moved to, and then click **Next**.
3. The **Confirm Reason Delete** dialog box lists a summary of the redaction reason that will be deleted and where it will be moved.
4. Click **Finish** to close the wizard, and then click **Close** to close the **Redaction Reasons** dialog box.

Delete redaction links

To delete redaction links, do the following:

1. Select the option to **Delete redaction links** and click **Next.**
2. The **Confirm Reason Delete** dialog box lists a summary of the redaction reason that will be deleted.
3. Click **Finish** to close the wizard, and then click **Close** to close the **Redaction Reasons** dialog box.

To import redaction reasons from a text file

1. On the **File** menu, click **Case Setup**, and then click **Redaction Reasons**.
2. In the **Redaction Reasons** dialog box, click **Import**.

3. Navigate to the folder of the existing text file, select the file you want to import, and then click **Open**.

   The imported reasons are added to the list of redaction reasons.

4. Click **Close** to close the **Redaction Reasons** dialog box.

To export redaction reasons to a text file

1. On the **File** menu, click **Case Setup**, and then click **Redaction Reasons**.
2. In the **Redaction Reasons** dialog box, click **Export**.
3. Navigate to the folder where you want to save the file and type the File name.

> The default File name is RedactionReasons.txt.

4. Click **Save**.

   The redaction reasons are exported to the text file.

5. Click **Close** to close the **Redaction Reasons** dialog box.

Related Topics

About redactions
Redacting transcript text
Editing redactions
Overlapping existing redactions

Redacting transcript text

A redaction is applied when confidential information that appears within transcript text needs to be removed.

The redaction tool allows you to select and highlight text within the transcript that contains sensitive information. The redaction appears transparent until printed. Once the transcript has been printed with redactions, the text will be concealed and cannot be viewed, copied, or searched.

To add a redaction

1. Highlight the transcript text you want to redact.
2. Right-click the selected text and then click **Redact in TextMap**.

   You can also click the **New Redaction**  button located in the Home Ribbon or the Create & Edit Ribbon.

3. Select the redaction reason(s) or click the **Redaction Option** button to select one of the following:

   - **Select All Reasons** to place a check mark beside all redaction reasons
   - **Unselect All Reasons** to remove the check mark beside all selected redaction reasons
   - **Manage Redaction Reasons** to open the Redaction Reasons dialog box

   A preview of the selected reasons appear as **Applied Reasons**.

> If the redaction reasons were not added during the initial Case Setup, click the Redaction Option button and then click **Manage Redaction Reasons** to define reasons for the case . See Managing redaction reasons for more information.

4. Click **OK** to save your selections.

To delete a single redaction

Once the redactions have been deleted, the action cannot be undone.

1. Click the redaction you want to delete.
2. On the **Create & Edit** ribbon, click **Delete**, and then click **Delete Redaction**.

   The redaction is deleted.

To delete all redactions

Once the redactions have been deleted, the action cannot be undone.

1. On the **Create & Edit** ribbon, click **Delete**, and then click **Delete all Redactions**.
2. Click **Yes** to confirm deletion.

   All redactions are deleted.

Related Topics

About redactions
Managing redaction reasons
Editing redactions
Overlapping existing redactions

Editing redactions

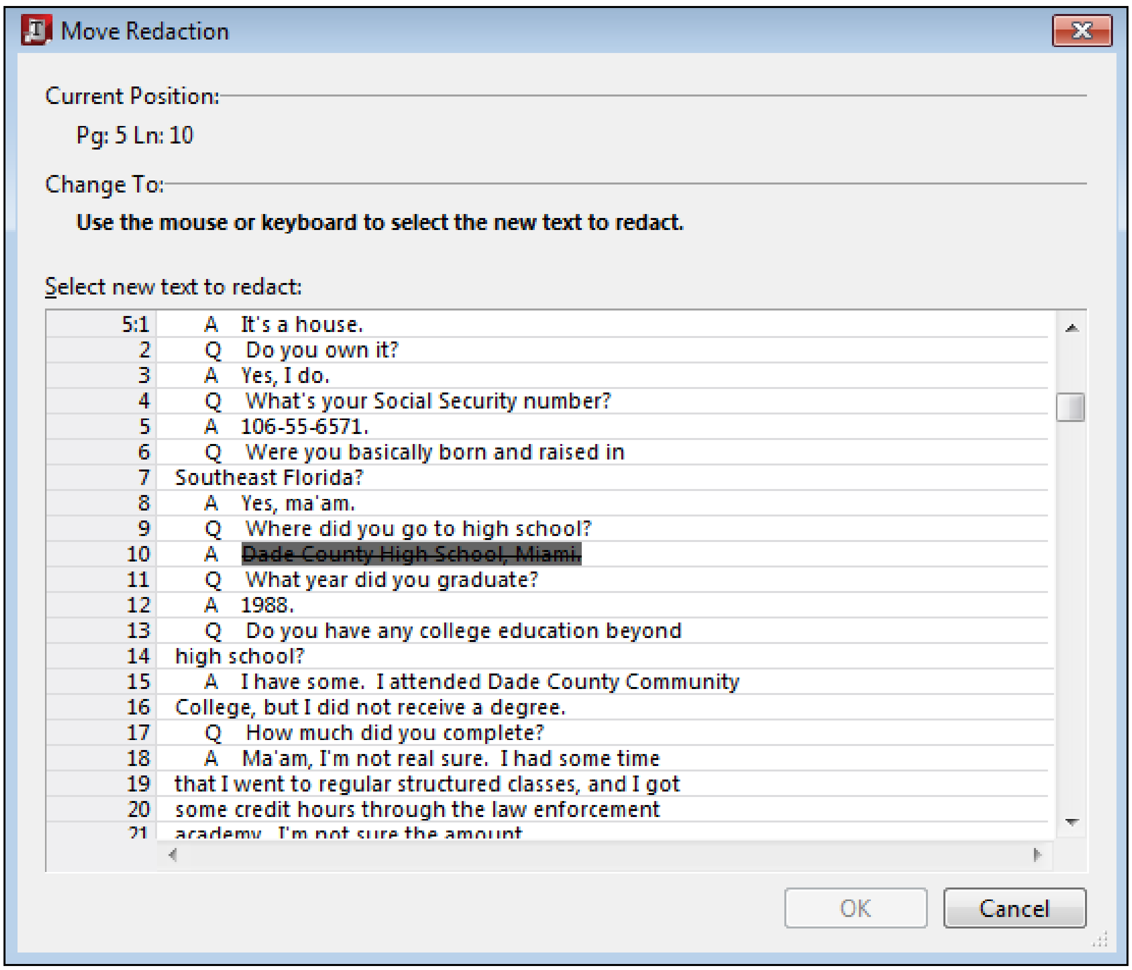
TextMap offers a variety of ways you can edit redactions.

Editing redactions involves moving the redactions or updating the reasons already applied to transcript text.

Once the redaction is edited, it is saved and permanently changed in the case.

To move a redaction

1. Click the redaction you want to move.
2. On the **Create & Edit** ribbon, click **Move** .
3. In the **Move Redaction** dialog box, select the new text that you want to move the redaction to in the transcript, and then click **OK**.



The redaction is moved to the newly selected text in the transcript.

To edit redactions applied to transcript text

1. Right-click the redaction you want to change and click **Edit Redaction**.
2. Select the redaction reason(s).

   A preview of the updated selected reasons appear as **Applied Reasons**.

3. Click **OK**.

To view redaction update history

When a redacted area is selected, you can edit the redaction or view the update history.

1. In the transcript, right-click a redaction and then click **Edit Redaction**.
2. In the **Edit Redaction** dialog box, click the **Update History** tab.

   The update history displays the name of the user, the original creation date and time as well as the name of the user and the updated date and time of the redaction.

Related Topics

About redactions
Managing redaction reasons
Redacting transcript text
Overlapping existing redactions

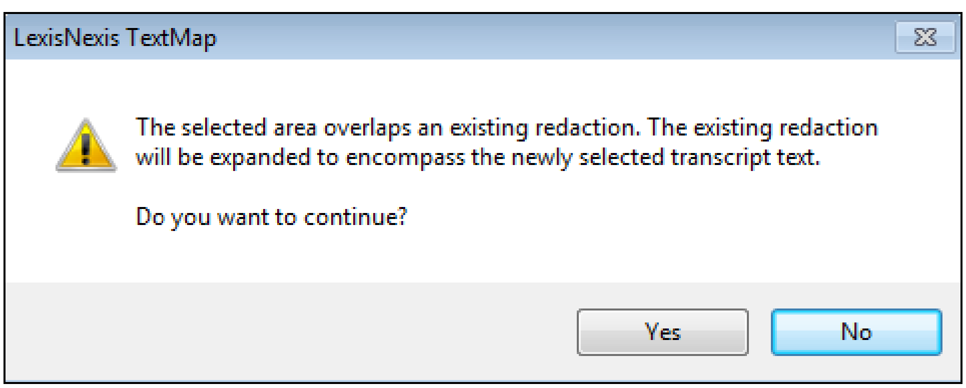
Overlapping existing redactions

The redaction tool overlaps existing redactions by selecting a portion of transcript text and applying a new redaction.

Overlapping existing redactions merges the new redaction to create a continuous redacted area.

To overlap a single redaction

1. Select the portion of text that overlaps a single existing redaction, right-click and then click **Redact in TextMap**.



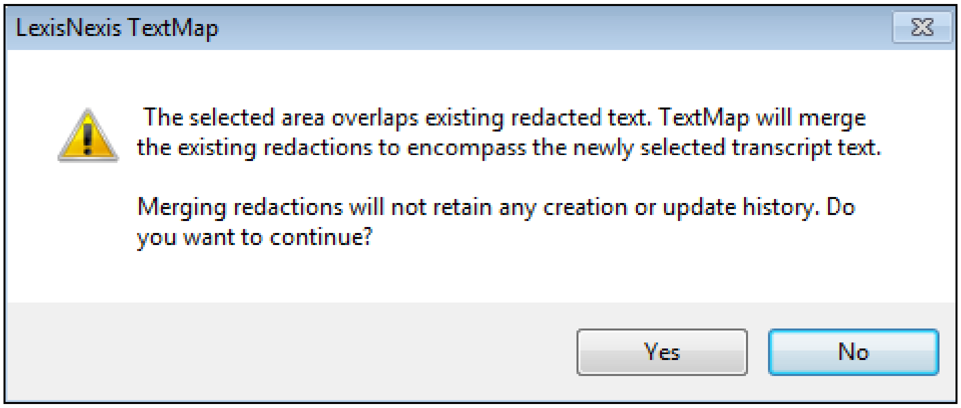
2. In the **Edit Redaction** dialog box, select the redaction reason(s) and then click **OK.**

   The existing redaction is expanded to include the newly selected transcript text.

To overlap multiple redactions

1. Select the portion of text that overlaps multiple redactions, right-click and then click **Redact in TextMap**.

Once multiple redactions have been merged, they will not retain any creation or update history.



2. In the **Edit Redaction** dialog box, select the redaction reason(s) and then click **OK**.

   The existing redactions are expanded to include the newly selected transcript text.

Related Topics

[About redactions](#)
[Managing redaction reasons](#)
[Redacting transcript text](#)
[Editing redactions](#)

Creating and Printing Reports

About reports

A report is a way to retrieve information that you imported or entered in your case. The TextMap Reports ribbon offers many useful reporting options for printing Current and Multiple Transcripts. Many of the reports have wizards to make creating useful work product quick and easy. Transcripts with annotations and linked issues have options for including the selected passages and filtering highlighted passages for desired issues. There are also options for including redacted transcript information. TextMap automatically creates a word index for all transcripts; you can include it with transcript reports or not.

You can print reports to PDF file or print directly onto paper. You can run reports of only the transcripts, just the annotations, or of both the transcripts and the annotations. Redactions can also be printed in reports which allows you to conceal sensitive information.

The date and time appears in brackets [ ] in front of the transcript name, and is included in all transcript reports (i.e., Multiple Transcript Report, Annotations Digest Report, etc.).

TextMap includes the following reports:

- **Current Transcript Report** — A simple report made from just one transcript. These reports provide you with the contents of the transcript arranged the way you specify, with the opportunity to select all annotations or annotations related to a specific issue. You can print the contents with or without annotations and can also choose to burn in redacted text. You also have the option of printing the word index for that transcript as part of your report. Redacted words are removed from the word index in the transcript if the option to exclude is selected.
- **Multiple Transcript Report (a.k.a ReportBooks)** — A report containing information from more than one transcript is also called a ReportBook. You have the opportunity to choose what transcripts to include in the ReportBook, as well as the option of including a Title Page, Table of Contents, and Introduction. You will have the option to organize transcripts in the order you want them. You also have the same options that you do with a single transcript report.

  Annotation Digests are also ReportBooks that can be printed to Microsoft Word. Annotation Digests include the annotations and notes from a set of ReportBooks and can be filtered by issue. See Printing Annotation Digests.
- **Search Report** — The Search Reports is based upon terms you type into the Full Text Search box. The report shows by transcript all locations that contain the search criteria.
- **Transcripts Listing** — A Transcripts Listing provides a list of the transcripts in the case.

Single and multiple transcript reports can be printed as full-sized, condensed or note-taking versions. Transcripts with Annotations reports allow you to print with Footnotes or Endnotes (full-size or condensed). See Understanding layout options.

The Transcripts with Annotations report and Annotation Digest reports allow you to print to a PDF format that includes linked exhibits embedded in the transcript. See Selecting print output options.

Create transcripts groups to organize transcripts that are often included in reports. See Creating transcript groups.

Customize title pages for polished reports

TextMap reports all print with a default title page to produce a polished work product. You can decide whether to include a title page for your reports. And you can customize the content and look of title pages to suit the needs of your organization.

Title pages can be customized within report wizards. However you can customize title pages and title page content in the Page Setup dialog box too. See Adding/editing title pages.

Include linked CaseMap facts in reports

By default TextMap includes three of CaseMap's Facts spreadsheet fields (Date & Time, Fact Text, and Status) in Transcript with Annotations reports and Annotation Digests. To customize CaseMap fields included in TextMap reports, see the Changing page setup options topic, Steps 8-10.

Embed linked documents in reports

Embedding linked documents in reports and ReportBooks printed to PDF files allows you to share the report and supporting files with others who do not have access to TextMap or the case. Once the report or ReportBook is printed to a PDF file, transcripts with linked exhibits or files will display with the transcript text underlined in blue. Clicking the underlined text opens the linked document.

Exhibit A

To view all linked documents embedded in the PDF file, click the Attachments button (paperclip) in Adobe Acrobat or Reader to view the list. See also Selecting print options.

Learn how un-numbered pages print in reports

Un-numbered pages display in many reports simply as "-". You will still see a colon and line number after the dash. In full-size transcript reports un-numbered page numbers display to the left of the line numbers.

Condensed transcripts do not display page numbers on front and back un-numbered pages. Page numbers in both transcript types display in the upper right corner of each page of testimony.

Related Topics

Changing page setup options
Adding/editing title pages
Selecting print output options
Understanding report options
Modifying title pages

Changing page setup options

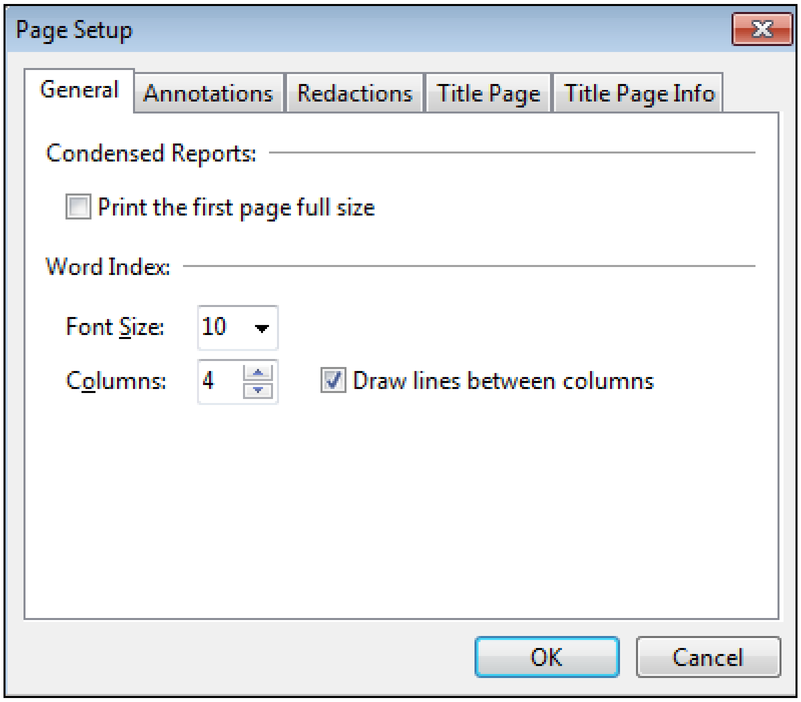
TextMap provides a variety of page setup options that include printing of overlapping and partial annotations, inclusion of CaseMap Fact fields, redaction settings, and more. Changes to these settings apply to all reports in the case.

To select or change page setup options

1. On the **File** menu, click **Print**, and then click the **Page Setup** link.

   You can also click access Page Setup options from any Print Preview dialog box.

2. In the **Page Setup** dialog box, click on the **General** tab to adjust condensed reports and case index options.

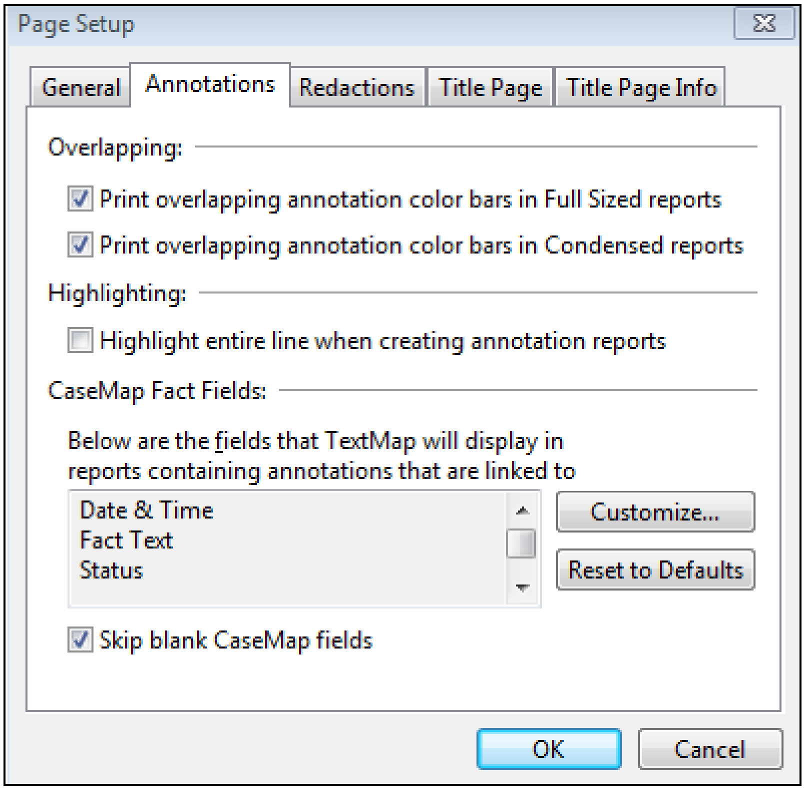


3. In the **Condensed Reports** area, select the **Print the first page full size** check box if you want this option.

4. In the **Word Index** area, click in the **Font Size** and **Columns** boxes to adjust these settings incrementally.

5. Select or clear the **Draw lines between columns** check box. This option is selected by default.

6. Click on the **Annotations** tab.



7. In the **Overlapping** area, select or clear whether to print overlapping annotations in full-sized or condensed reports.

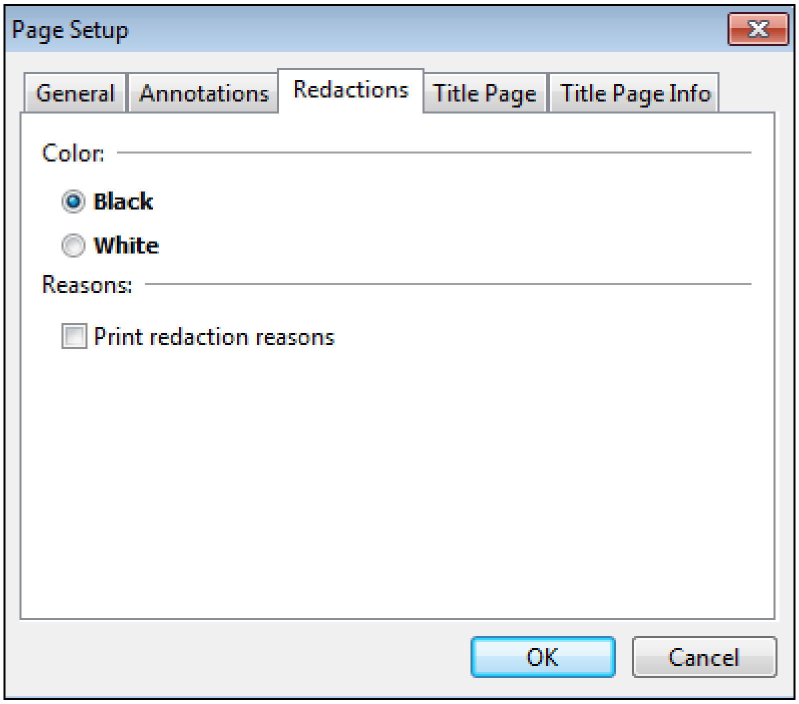
8. In the **Highlighting** area, check the box to highlight the entire line when creating annotation reports.

9. In the **CaseMap Fact Fields** area, select what CaseMap fields display in reports.

10. Click the **Customize** button to add or remove fields from reports.

11. Clear the **Skip blank CaseMap** fields check the box to print blank fields in reports.

12. Click on the **Redactions** tab.



13. In the **Color** area, select whether to print the redaction color in black or white. The default option is set to black.

13. In the **Reasons** area, select or clear the check box to toggle printing the redaction reasons in the report.

14. Click **OK** to save changes.

Related Topics

About reports
Adding/editing title pages
Selecting print output options

Adding/editing title pages

You can add a title page to any report you print or save as an Adobe® Acrobat PDF file. Rather than creating a title page each time you generate a report, you can edit the default title page format that works for all reports. You can also decide whether to include a title page or remove it from the report. The title page feature is turned on by default when you create a new case. Changes to the report title page affect all reports in the case. These settings are accessible in the Page Setup dialog box on the File menu.

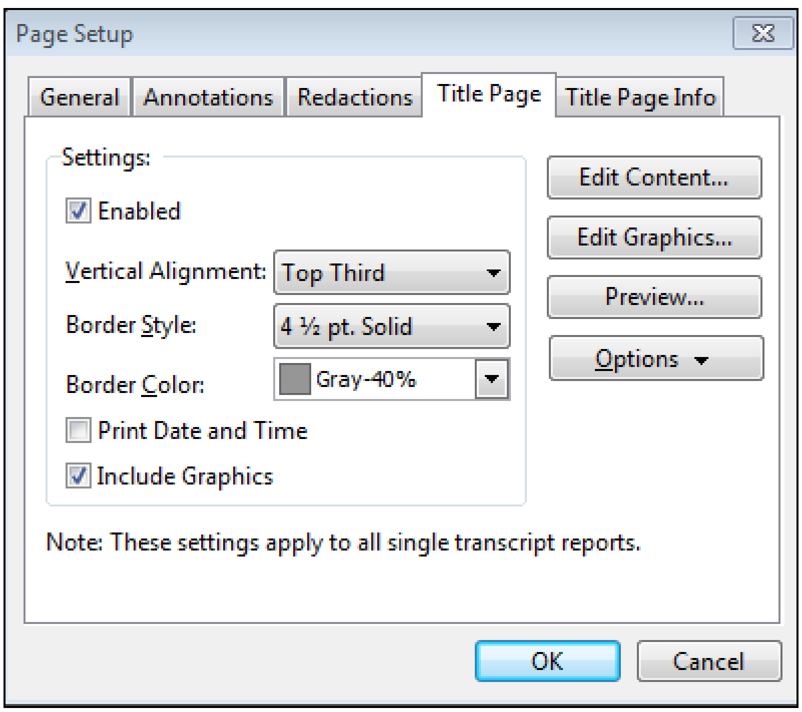
Title page settings include the following:

- Report titles and subtitles
- Text orientation and alignment
- Border styles and colors
- Graphics
- Date and time
- Page Number
- Organization and case name
- Confidentiality statement

Multiple transcript reports and Annotation Digests include a title page, confidentiality statement, table of contents, introduction, and transcript title page. Each of these can be modified according to your organization's needs on the ReportBook Wizard's Option page. For more information, see Modifying ReportBook title pages.

To add/edit report title pages

1. On the **File** menu, click **Print**, and then click the **Page Setup** link.
2. In the **Page Setup** dialog box, click the **Title Page** tab.



3. In the **Vertical Alignment** list, click on the alignment option you want: **Top**, **Top Third**, **Middle**, **Bottom Third**, **Bottom**.
4. In the **Border Style** listing, click the point size for the border width.
5. In the **Border Color** listing, click the color scale you want to use.

6. Select check boxes to include these options: **Print Date and Time**, **Print Page Number**, and **Include Graphics**.

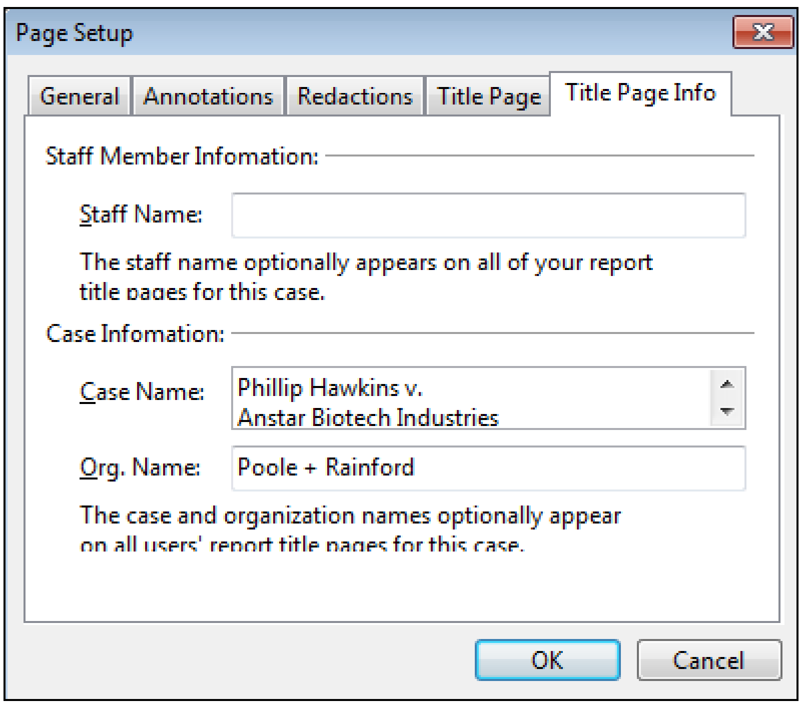
7. Click the **Edit Content** button to modify the content that prints on each page, including typing or pasting text, modifying the font size and color, adjusting text alignment, inserting symbols or specific fields.

8. Click the **Edit Graphics** button to preview current graphics, and modify the header and footer graphic settings (like your organization's logo). You can also remove, load, and save graphics for title pages.

9. Click the **Preview** button to review your changes.

10. Click the **Options** button and then click **Load Defaults**, which changes all settings back to the default setting.

11. Click on the **Title Page Info** tab to modify staff, case, and organization names for reports.



12. In the **Staff Name** field, type in a staff member name that you want to print on all reports.

13. In the **Case Name** field, edit the case name for how you want it to print on all reports.

14. In the **Org. Name** field, type or edit your organization's name for how you want it to print on all reports.

15. Click **OK** to save the settings.

Related Topics

[About reports](#)
[Changing page setup options](#)
[Selecting print output options](#)
[Understanding report options](#)
[Modifying ReportBook title pages](#)

Selecting print output options

Printing transcript data or reports is as simple as selecting the printer destination or the export file type/program you want to use. Print options are accessible from the File menu and on the TextMap toolbar.

Printer output options include:

- Printer destination
- Print Preview mode
- Print to PDF (save or email)
- Print to Microsoft® Word

We recommend you select Preview first to verify your report before printing a hard copy or saving the report as a PDF file. You can select your print options from the Print Preview toolbar.

When you use TextMap's built-in PDF writer (which doesn't require an Adobe® Acrobat® license) to generate these reports, TextMap adds extra functionality to the PDF. For example, in the Endnotes report, TextMap creates links between each annotation and the associated endnote. TextMap also creates links from the case index to the pages on which each word in the index appears.

The Transcripts with Annotations and Annotation Digest reports allows you to print to a PDF format that includes linked exhibits embedded in the transcript.

To print Annotation Digests to Microsoft Word

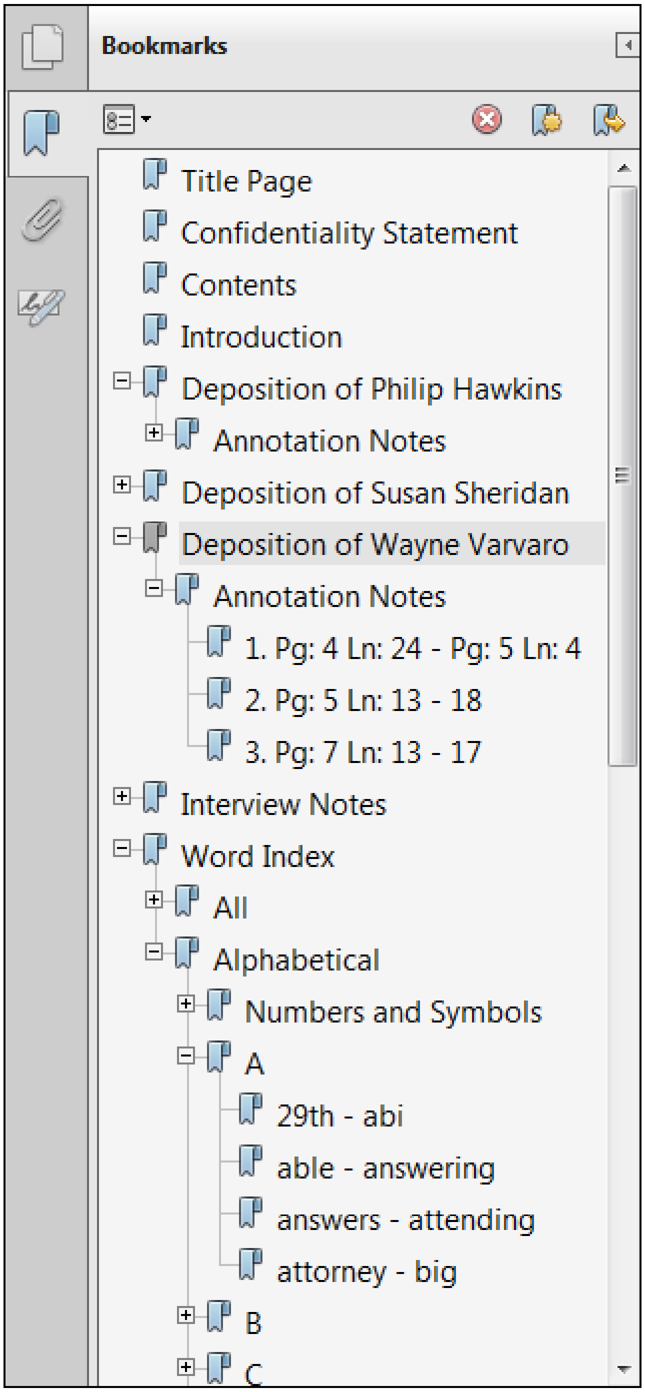
Each Annotation Digest report can be printed directly to Microsoft® Word. See Printing to Microsoft Word.

To print to PDF

All the report styles available in TextMap are available as PDFs, including ReportBook compilations of multiple transcripts.

When you use TextMap's built-in PDF writer (which doesn't require an Adobe® Acrobat® license) to generate these reports, TextMap adds extra functionality to the PDF. For example, in the Endnotes report, TextMap creates links between each annotation and the associated endnote. TextMap also creates links from the case index to the pages on which each word in the index appears.

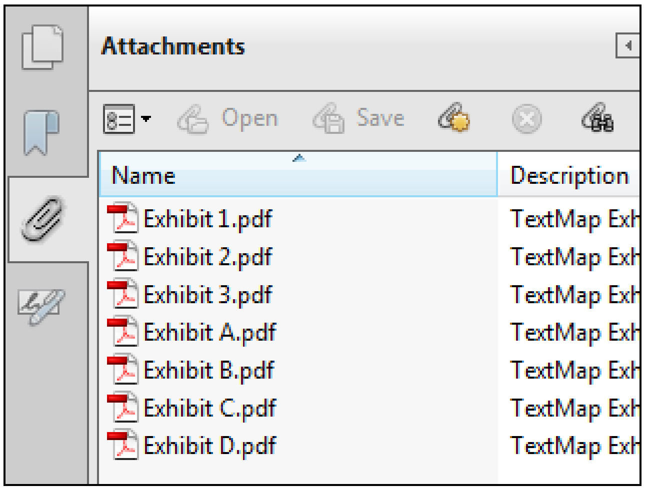
Additionally, PDF reports include bookmarks grouped by letter that make it easy to navigate to index pages containing words of interest. TextMap PDF reports automatically include a Title Page too.



TextMap also embeds exhibits and documents hyperlinked to transcripts in PDF reports. Exhibits and linked documents display as hyperlinks in the text. Click on the hyperlink to view the embedded file.

Exhibit A

To view all linked documents embedded in the PDF file, click the Attachments button (paperclip) in Adobe Acrobat or Reader to view the list.



To access PDF print options

Within TextMap, you can convert spreadsheet views, reports, and ReportBooks into PDF files — even if you don't have a license for Adobe® Acrobat (Standard or Professional) on your computer.

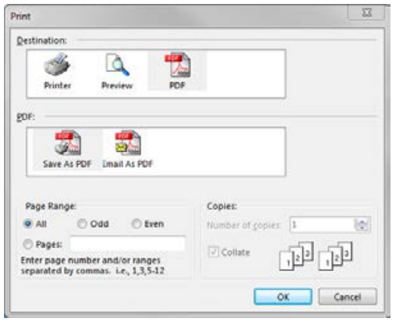
Access PDF print options from:

- File menu > Print > [select transcript(s) print options] > Print menu
- File menu > Print Preview > [select transcript print options] > Print menu
- PDF toolbar button > a selected report > Print menu
- Print to PDF toolbar button (save or email) > a selected report > Print menu
- Reports ribbon > [select transcript(s)] > Print menu

If you are selecting print options within Acrobat, refer to the Adobe Acrobat documentation for details.

To save or email a PDF report

1. On the **Reports** ribbon, click **Transcript Listing**, and then click the **PDF** icon.



2. In the Print dialog box, click one of the following:

   Save As PDF

   1. In the **Page Range** area of the **Print** dialog box, select the applicable pages (**All**, **Odd**, or **Even**).
   2. Click **OK** to open the **Save As PDF** dialog box.
   3. Select the the file to be saved.
   4. In the **File name** box, enter/verify the name of the file, and click **Save**.
   5. In the message box, click **OK** to continue.

      Your selected transcript(s) will be printed in report form to an Adobe Acrobat PDF file.

   Email As PDF

   1. In the **Page Range** area of the **Print** dialog box, select the applicable pages (**All**, **Odd**, or **Even**).
   2. Click **OK** to open the **Save As PDF** dialog box.
   3. Select the the file to be saved.
   4. In the **File name** box, enter/verify the name of the file, and click **Save**.
   5. In the message box, click **OK** to open the default email application.
   6. Complete the email form as appropriate, and click **Send**.

      Your selected transcript(s) will be printed in report form as an attachment in a Microsoft Outlook email.

Related Topics

About reports

[Changing page setup options](#)
[Adding/editing title pages](#)

Printing Transcript Reports

Understanding layout options

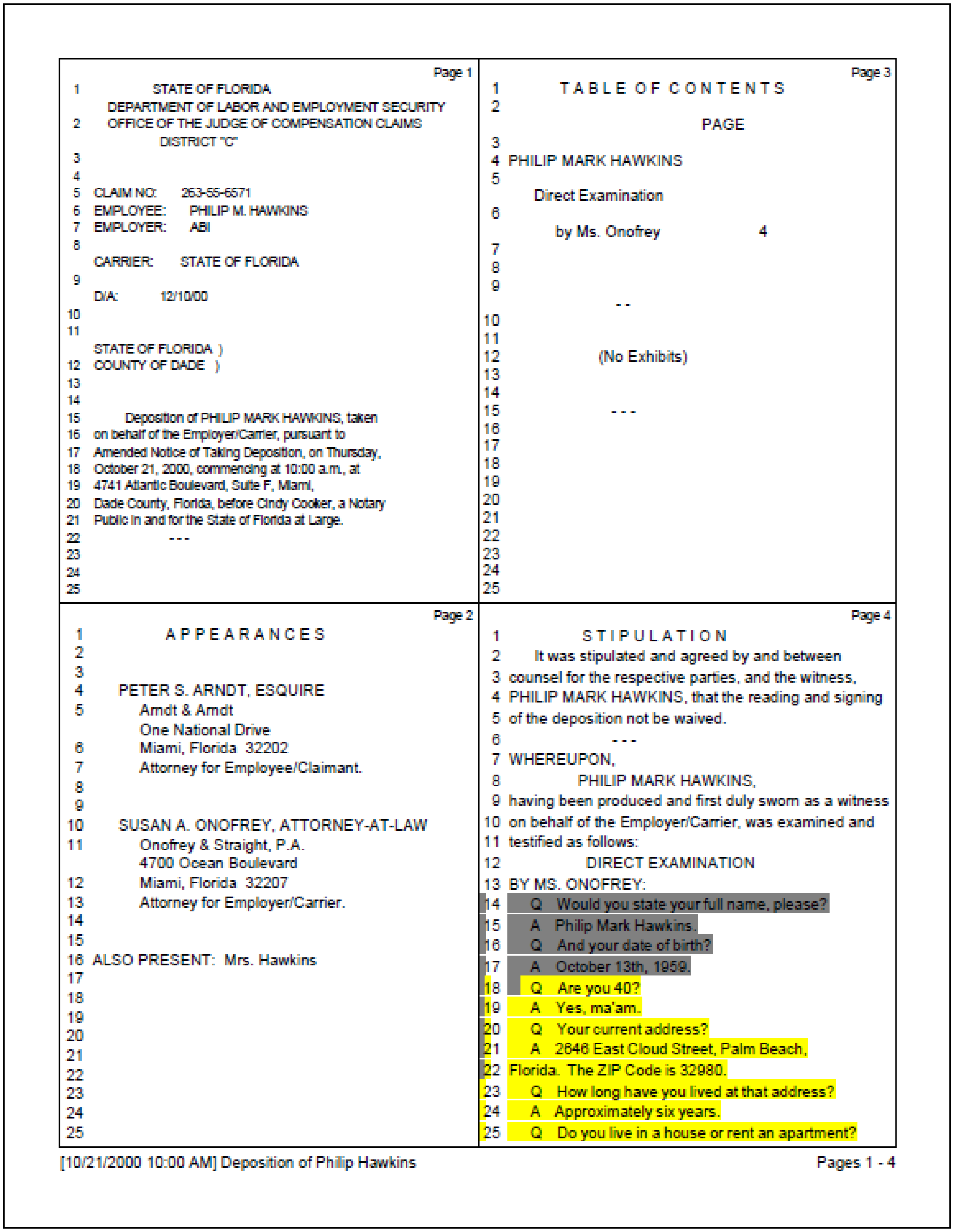
TextMap offers a variety of layout options for printing reports and Annotation Digests. Reference the following section to understand each layout option, how annotations and notes print for each layout, how to embed linked exhibits in reports with annotations, and how reports print overlapping annotations.

Select transcript report layout options

Each single or multiple transcript report includes the following transcript layout options.

You have three layout options for printing transcripts:

- **Full-size** — A copy of the transcript with 25 lines per page (or the number of lines the court reporter included in the ASCII file).
- **Condensed** — The transcript prints "four-up", with four pages of text on each page. You have the option to print the first page as full-size. See Selecting print output options.



Page 1

STATE OF FLORIDA
DEPARTMENT OF LABOR AND EMPLOYMENT SECURITY
OFFICE OF THE JUDGE OF COMPENSATION CLAIMS
DISTRICT "C"

CLAIM NO: 263-55-6571
EMPLOYEE: PHILIP M. HAWKINS
EMPLOYER: ABI

CARRIER: STATE OF FLORIDA

D/A: 12/10/00

STATE OF FLORIDA)
COUNTY OF DADE)

Deposition of PHILIP MARK HAWKINS, taken on behalf of the Employer/Carrier, pursuant to Amended Notice of Taking Deposition, on Thursday, October 21, 2000, commencing at 10:00 a.m., at 4741 Atlantic Boulevard, Suite F, Miami, Dade County, Florida, before Cindy Cooker, a Notary Public in and for the State of Florida at Large.

Page 2

A P P E A R A N C E S

PETER S. ARNDT, ESQUIRE
Arndt & Arndt
One National Drive
Miami, Florida 32202
Attorney for Employee/Claimant.

SUSAN A. ONOFREY, ATTORNEY-AT-LAW
Onofrey & Straight, P.A.
4700 Ocean Boulevard
Miami, Florida 32207
Attorney for Employer/Carrier.

ALSO PRESENT: Mrs. Hawkins

Page 3

T A B L E O F C O N T E N T S

PAGE

PHILIP MARK HAWKINS

Direct Examination

by Ms. Onofrey 4

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(No Exhibits)

Page 4

S T I P U L A T I O N

It was stipulated and agreed by and between counsel for the respective parties, and the witness, PHILIP MARK HAWKINS, that the reading and signing of the deposition not be waived.

WHEREUPON,

PHILIP MARK HAWKINS,

having been produced and first duly sworn as a witness on behalf of the Employer/Carrier, was examined and testified as follows:

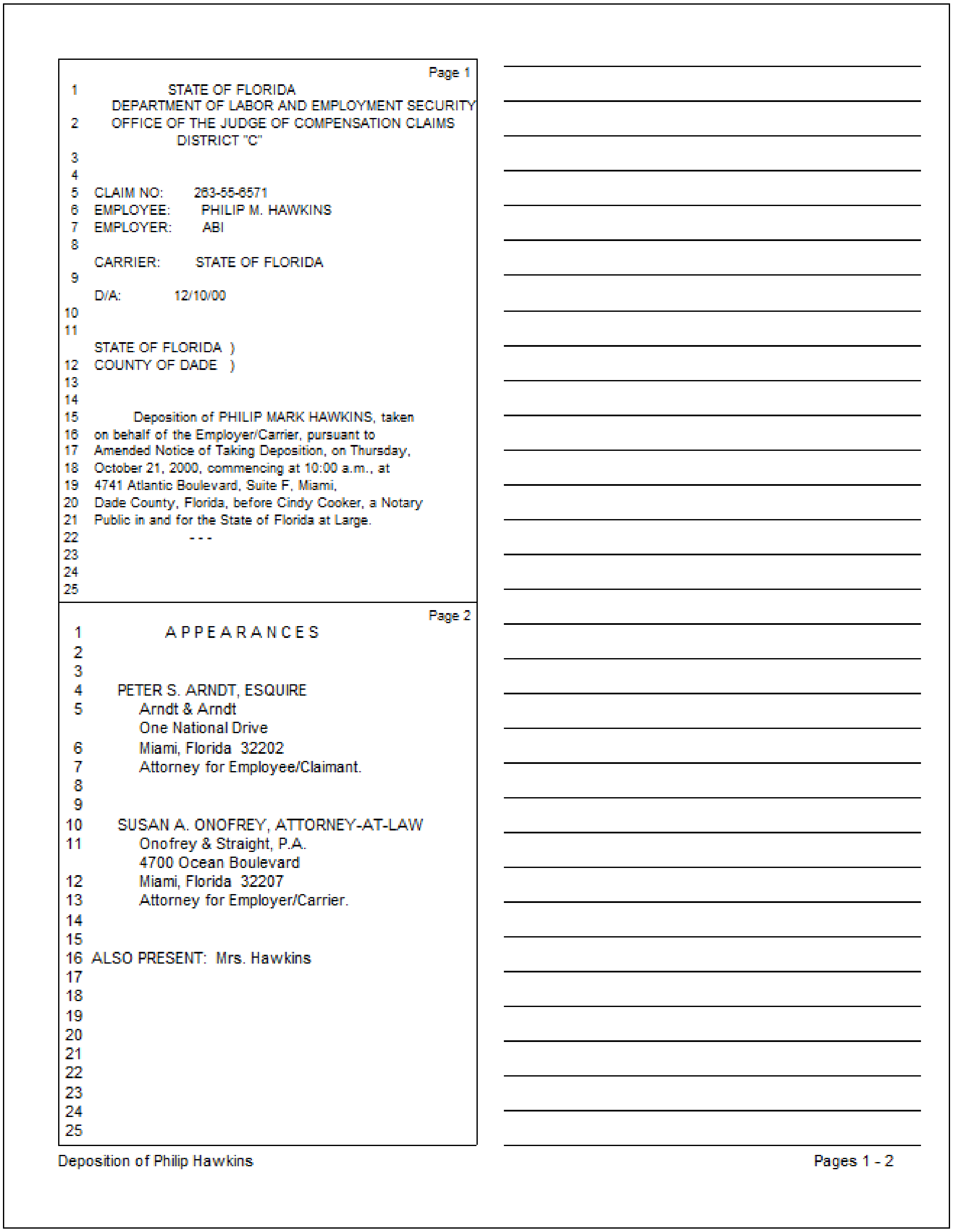
DIRECT EXAMINATION

BY MS. ONOFREY:

Q Would you state your full name, please?
A Philip Mark Hawkins.
Q And your date of birth?
A October 13th, 1959.
Q Are you 40?
A Yes, ma'am.
Q Your current address?
A 2646 East Cloud Street, Palm Beach, Florida. The ZIP Code is 32980.
Q How long have you lived at that address?
A Approximately six years.
Q Do you live in a house or rent an apartment?

[10/21/2000 10:00 AM] Deposition of Philip Hawkins Pages 1 - 4

- **Note-taking** — The Note-Taking Report prints two condensed transcript pages on the left side of a printed page and adds lines for handwritten notes on the right.



Page 1

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Onofrey & Straight, P.A.
4700 Ocean Boulevard
Miami, Florida 32207
Attorney for Employer/Carrier.

ALSO PRESENT: Mrs. Hawkins

Deposition of Philip Hawkins

Pages 1 - 2

Use the Note-taking option, if you or another trial team member prefers to work with paper to annotate depositions. This note-taking report option prints two condensed transcript pages on the left side of a printed page and adds lines for handwritten notes on the right. Once the the deposition is marked up, someone can use TextMap to manually enter the annotations and related notes so everyone on the trial team can share the knowledge.

Learn how annotation and notes print in each layout

Reference the following report layouts to understand how annotations and notes print for each.

- **Footnotes** — The Footnote report places notes at the bottom of transcript pages. Two condensed pages print at the top of each page to leave room for the footnotes at the bottom of each page that has annotations. Each annotation is sequentially numbered. If you have more notes than will fit on the page, TextMap starts a new page and continues the notes so that all your work is included in logical sequence.

Page 17

Vero Beach.
Q. That would have been after you left the property?
A. I believe so. Without my log notes, I don't recall the exact dates on these things.
Q. Have you reviewed your log notes?
A. Briefly, but not dates.
2 Q. And what happened when you called over to the county?
A. I spoke to Tessa one time. Her name just stands out because it was a unique name. And she had indicated that they did not show any excessive water usage or any water usage in September or prior to, at that point, and I said that there has to be some water usage because we have a water damage claim.
Q. In your discussions with Mr. Hawkins, did she represent to you that she had shut the water main valve off?
A. Yes, she did.
3 Q. Okay. So someone had to turn that valve back on.
A. Apparently.
Q. And in your investigation of the case, have you ever determined who did that?
A. No.

Page 18

Q. Have you ever interviewed officials at the county government as to whether they did that or not?
A. They had indicated that there was no -- apparently they do some form or something when it's requested that they go out and turn water off or on, and there was no record of either being done by the county.
Q. Did you interview Beth Jordan?
A. No. I have no idea who that is.
Q. Do you know a gentleman, a black male named James, that works there?
A. No.
Q. Have you ever interviewed Terry Southard?
A. No.
Q. Have you ever interviewed anyone from Meeks Plumbing?
A. No.
Q. So other than talking to Chris Reinhart, Laurence Remetz, and Mr. Hawkins, have you talked to anyone else about this loss?
A. Tessa at the city, and there was one other person at the city I spoke to at another time, but I don't recall her name.
Q. That's it?
A. Uh-huh.
Q. That's a "yes"?

Notes:

2. Pg: 17 Ln: 6 - 13

Note: Here we have testimony that Sheridan consulted with the county on the excess water usage at the apartment. This clearly shows that either there was a leak that had been ignored or the occupants of the apartment were obsessive about bathing or perhaps engaged in an illegal agriculture operation and using the water for irrigation. Check police records.

Linked Issues: Possible Impeachment

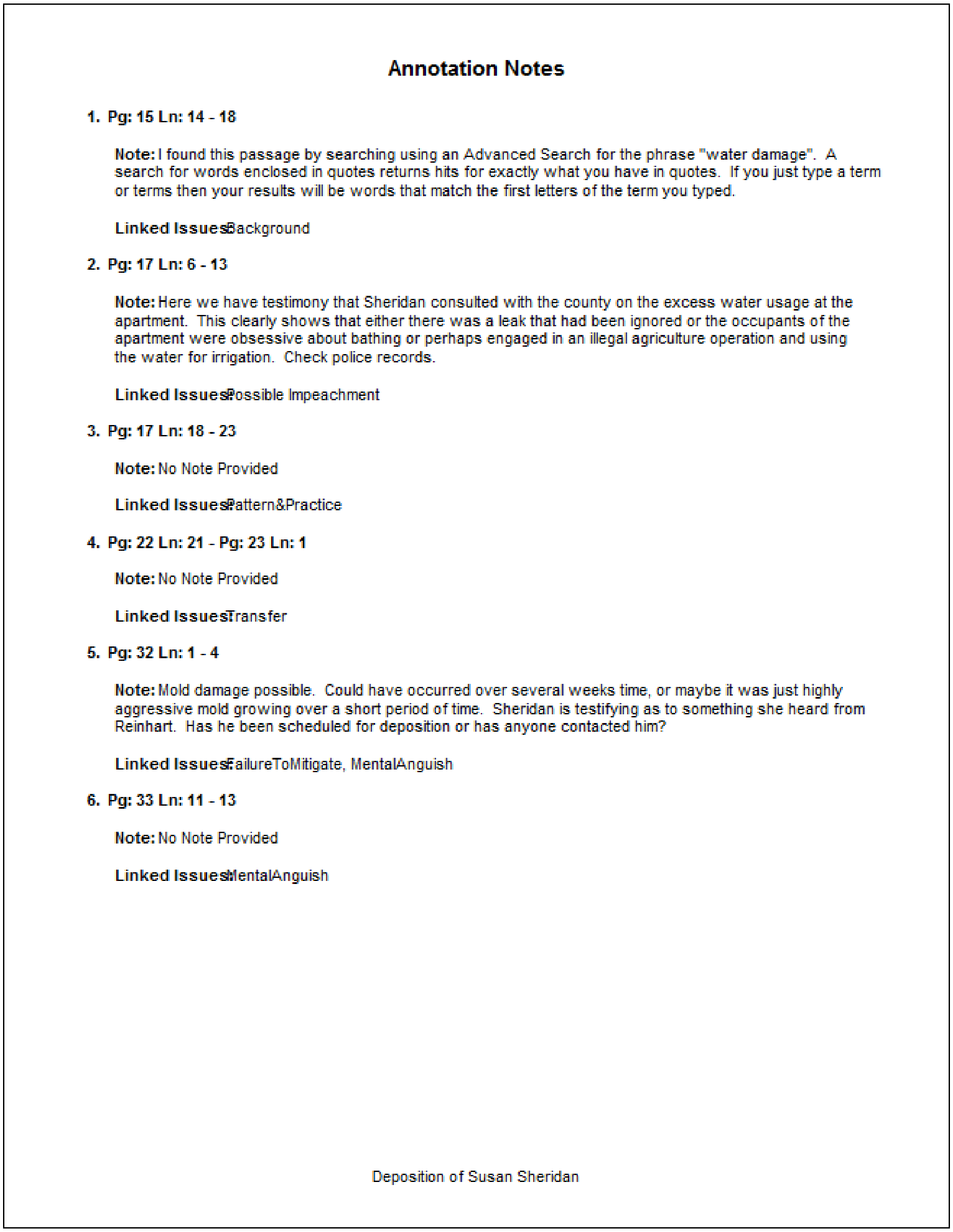
3. Pg: 17 Ln: 18 - 23

Note: No Note Provided

Linked Issues: Pattern&Practice

[5/23/2003 11:47 AM] Deposition of Susan Sheridan Pages 17 - 18

- **Endnotes - Full-size Transcripts** — The Full-size Transcripts report places notes at the back of the transcript, before the case index. All annotations are numbered and organized with notes. Including a case index is optional.



Annotation Notes

1. **Pg: 15 Ln: 14 - 18**

   Note: I found this passage by searching using an Advanced Search for the phrase "water damage". A search for words enclosed in quotes returns hits for exactly what you have in quotes. If you just type a term or terms then your results will be words that match the first letters of the term you typed.

   Linked Issues: Background

2. **Pg: 17 Ln: 6 - 13**

   Note: Here we have testimony that Sheridan consulted with the county on the excess water usage at the apartment. This clearly shows that either there was a leak that had been ignored or the occupants of the apartment were obsessive about bathing or perhaps engaged in an illegal agriculture operation and using the water for irrigation. Check police records.

   Linked Issues: Possible Impeachment

3. **Pg: 17 Ln: 18 - 23**

   Note: No Note Provided

   Linked Issues: Pattern&Practice

4. **Pg: 22 Ln: 21 - Pg: 23 Ln: 1**

   Note: No Note Provided

   Linked Issues: Transfer

5. **Pg: 32 Ln: 1 - 4**

   Note: Mold damage possible. Could have occurred over several weeks time, or maybe it was just highly aggressive mold growing over a short period of time. Sheridan is testifying as to something she heard from Reinhart. Has he been scheduled for deposition or has anyone contacted him?

   Linked Issues: FailureToMitigate, MentalAnguish

6. **Pg: 33 Ln: 11 - 13**

   Note: No Note Provided

   Linked Issues: MentalAnguish

Deposition of Susan Sheridan

- **Endnotes - Condensed Transcripts** — The Condensed Transcript Report prints four pages of the transcript on each output page of the report and places notes at the back of the transcript (similar to the Full-size Transcripts report example).

If you are using both TextMap and CaseMap for your case and you want to make annotations first, review the results from TextMap in a PDF and then send selected annotations to CaseMap later.

Embed linked exhibits in transcripts with annotations

The Transcripts With Annotations report wizard allows you to print to a PDF format that includes linked exhibits embedded in the transcript.

TextMap report wizard options include:

- Linked issues
- Linked CaseMap facts
- A case index
- Options for including report and transcript title pages, a confidentiality statement, table of contents, and introduction. (These options are not included in the Footnotes report; only in Endnotes reports.) See Modifying title pages.

If you print the transcript with a case index to a PDF file, each word's page and line reference in the index is a hyperlink to the page in the transcript where the word appears. TextMap also creates bookmarks in the PDF for the contents of the report or ReportBook and for the entire case index, if you choose to include one.

Learn about printing with overlapping annotations

Overlapping annotation bars print in both full-size and condensed reports, and single or multiple transcripts. In full-size reports, colored annotation bars display to the left of the transcript text up to 1/4 inch (up to approximately six bars deep). In condensed and note-taking reports, overlaps display to the left of the highlighted text, over the line numbers.

4

S T I P U L A T I O N

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\- - -

WHEREUPON,

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DIRECT EXAMINATION

BY MS. ONOFREY:

Q Would you state your full name, please?
A Philip Mark Hawkins.
Q And your date of birth?
A October 13th, 1959.
Q Are you 40?
A Yes, ma'am.
Q Your current address?
A 2646 East Cloud Street, Palm Beach, Florida. The ZIP Code is 32980.
Q How long have you lived at that address?
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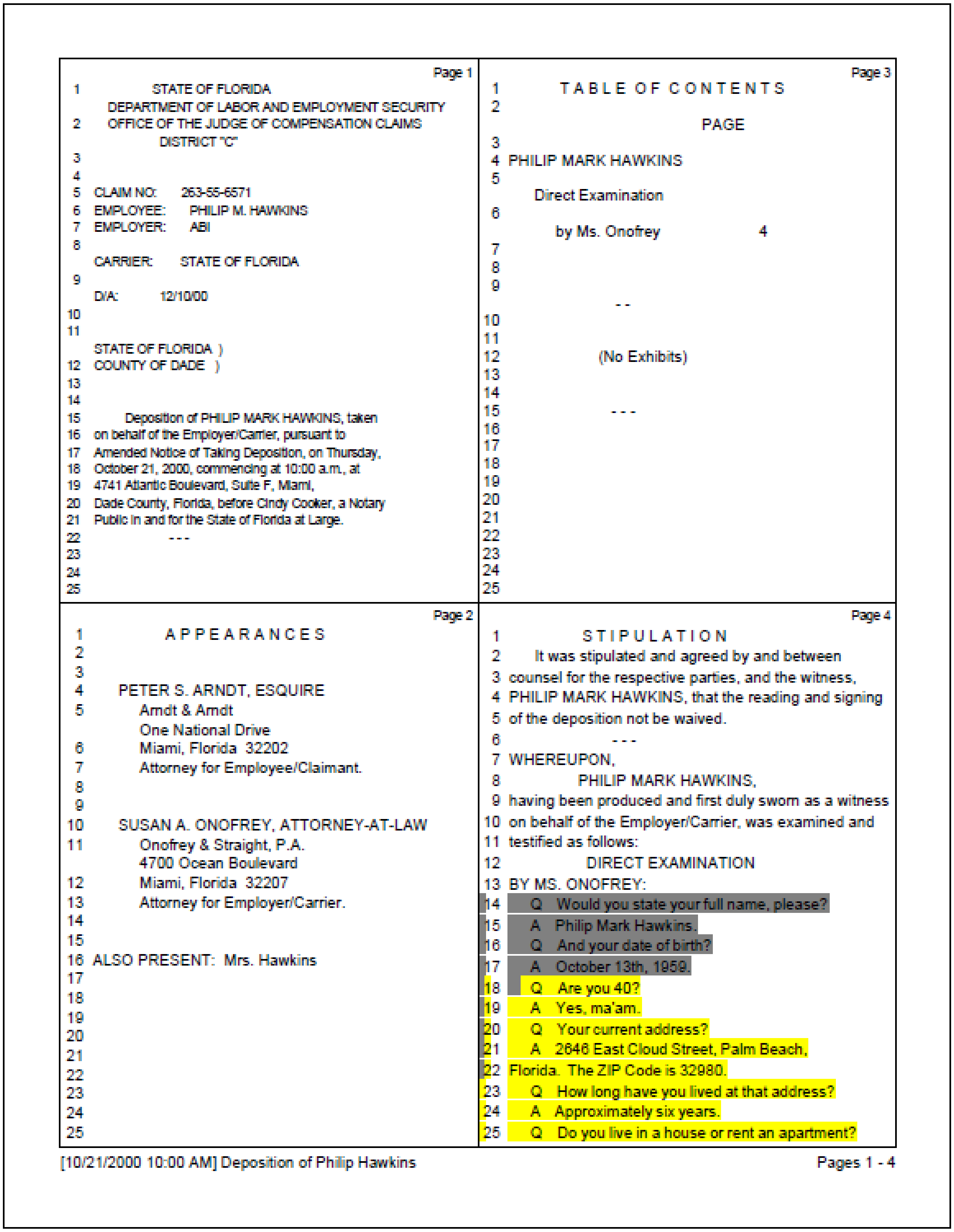
Q Do you live in a house or rent an apartment?

[10/21/2000 10:00 AM] Deposition of Philip Hawkins



Page 1

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EMPLOYER: ABI

CARRIER: STATE OF FLORIDA

D/A: 12/10/00

STATE OF FLORIDA)
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- - -

Page 3

T A B L E O F C O N T E N T S

PAGE

PHILIP MARK HAWKINS

Direct Examination

by Ms. Onofrey 4

- -

(No Exhibits)

- - -

Page 2

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PETER S. ARNDT, ESQUIRE
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Attorney for Employer/Carrier.

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Page 4

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Q How long have you lived at that address?
A Approximately six years.
Q Do you live in a house or rent an apartment?

[10/21/2000 10:00 AM] Deposition of Philip Hawkins Pages 1 - 4

This feature is turned on by default, but can be turned off from the File menu by clicking Page Setup and then clicking the Annotations tab. Clear the Overlapping check boxes to prevent printing. See [Selecting print output options](#).

Related Topics

[About reports](#)
[Changing print options](#)
[Adding/editing title pages](#)
[Printing single transcripts](#)
[Printing multiple transcripts](#)
[Printing Annotation Digests](#)

Printing single transcripts

A Single Transcript Report is a simple report made from just one transcript. These reports provide you with the contents of the transcript arranged the way you specify, with the opportunity to select all annotations or annotations related to a specific issue. You can print the contents with or without annotations and redactions. You also have the option of printing the entire transcript word index as part of your report. If redactions are burned into the report, the redacted words will be excluded.

Page 29

Q The same pay you were receiving at the time the accident occurred?
A Yes, ma'am.
Q Are you on salary?
A Yes, ma'am.
Q What was your salary at the time of the accident?
A Ma'am, I'd have to -- my base salary is just over $36,000 a year.
Q And then do you get something over and above your base salary?
A Yes, ma'am. We have a state hire-back program where I work overtime. Back then we were working roughly one day a week of that, which would be a six-hour shift.
Q And those were the only elements of your pay, salary plus overtime?
A Yes, ma'am.
Q Was health insurance provided by the State, or did you pay for your own health insurance at the time? You know, around the time of the accident, were you paying out of your own pocket for health insurance, or was your employer paying for it?
A Well, it's a benefit package of the State. Since my wife and I are both State employees, we fall

Page 30

under a special provision with Blue Cross & Blue Shield where we do not pay anything out of our pocket.
Q When you were -- and I may have asked you this and I think you answered it, but between May 1st and June 16th, when you were doing light-duty work, you were receiving your regular pay?
A Yes.
Q Were you working your regular hours?
A Confidential
Confidential
Q But your schedule hadn't really changed since before the accident. I mean, you returned working the same type of hours that you were doing before the accident? 17
A No, ma'am. When you're on full duty, you work shifts. When I was working light duty, I was assigned to the office, and I worked basically 8:00 to 5:00, Monday through Fridays, with Saturdays and Sundays off.
Q What type of work were you doing in the office?
A Clerical duties, answering telephone, legal questions.
Q Between the time of your last day of work on the 18th of January and when you returned on May 1st,

Notes:

17. Pg: 30 Ln: 11 - 19

Note: Here Hawkins talks about the difference between the kind of work he did prior to the accident then contrasts it to the work he's able to do now.

Linked Issues: AgeDiscrimination, Demotion

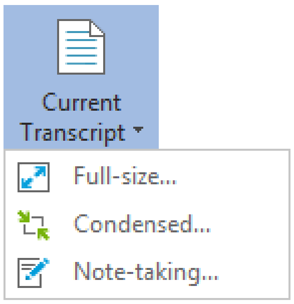
[10/21/2000 10:00 AM] Deposition of Philip Hawkins Pages 29 - 30

All single transcript reports can be saved, printed, or emailed as PDFs. Transcript reports can also be saved as Microsoft Word files.

⊟ **To print a single transcript report**

1. In the **Transcripts** pane, click on the transcript you want to use in the report.
2. On the **Reports** ribbon, click **Current Transcript**.

   You can also click Print on the File menu, and then click Current Transcript.

3. On the **Current Transcript** submenu, click **Full-size**, **Condensed**, or **Note-taking**.

   See Understanding layout options for details.

4. On the **Transcript Report Wizard's Welcome** page, click **Next**.
5. On the **Highlight Annotations** page, choose one of the following:
   - No, do not highlight annotations.
   - Yes, highlight all annotations.
   - Yes, highlight annotations linked to selected issues.

     In the Select issues to include box, select the check box next to each issue you want to include.
6. Click **Next**.
7. On the **Include Redactions** page, choose one of the following:
   - Yes, to burn in redacted text to the printed report.
   - No, to not include burned redactions into the printed report.

   See Changing page setup options for details on applying the redaction color and reasons.
8. Click **Next**.
9. On the **Include Word Index** page, choose one of the following:
   - Yes, include a word index.
   - No, do not include a word index.
10. Click **Next**.
11. On the **Completing the Transcript Report Wizard** page, click **Finish** to generate the report.
12. In the **Print** dialog box, under **Destination**, click the print output you want.

    The print options will change depending on your selection. See Selecting print output options.

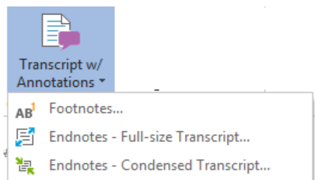
We recommend you select Preview first to verify your report before printing a hard copy or saving the report as a PDF file. You can select your print options from the Print Preview toolbar.

13. Select additional print options, then click **OK**.

To print a single transcript with annotations

1. In the **Transcripts** pane, click on the transcript you want to use in the report.
2. On the **Reports** ribbon, click **Transcript w/ Annotations**.

   You can also click Print on the File menu, and then click Current Transcript.

3. On the **Transcript with Annotations** submenu, click **Footnotes**, **Endnotes - Full-size Transcript**, or **Endnotes - Condensed Transcript**.

   See Understanding layout options for details.

4. On the **Transcript Report Wizard's Welcome** page, click **Next**.
5. On the **Limit Annotations by Issue** page, choose one of the following:
   - Yes, include all annotations.
   - No, only include annotations linked to the selected issues.

     In the Select issues to include box, select the check box next to each issue you want to include.
6. Click **Next**.
7. On the **Include Redactions** page, choose one of the following:
   - Yes, to burn in redacted text to the printed report.
   - No, to not include burned redactions into the printed report.

   See Changing page setup options for details on applying the redaction color and reasons.
8. Click **Next**.
9. On the **Linked CaseMap Facts** page, choose one of the following:
   - Yes, include linked facts.
   - No, do not include linked facts.

     To include facts from CaseMap, you must first have the corresponding case open in CaseMap.

By default TextMap includes three of CaseMap's Facts spreadsheet fields in reports: Date & Time, Fact Text, and Status. To customize CaseMap fields included in TextMap reports, see the Changing page setup options topic, Steps 8-10.

10. Click **Next**.

11. On the **Include Word Index** page, choose one of the following:
    - Yes, include a word index.
    - No, do not include a word index.

12. Click **Next**.

13. On the **Completing the Report Wizard** page, click **Finish** to generate the report.

14. In the **Print** dialog box, under **Destination**, click the print output you want.

    The print options will change depending on your selection. See Selecting print output options.

We recommend you select Preview first to verify your report before printing a hard copy or saving the report as a PDF file. You can select your print options from the Print Preview toolbar.

15. Select additional print options, then click **OK**.

Related Topics

About reports
Selecting print output options
Understanding layout options
Printing multiple transcripts
Printing Annotation Digests

Printing multiple transcripts

Any time a report is created based on multiple transcripts, you are creating a ReportBook. A ReportBook is a compilation of any number of TextMap reports packaged with optional elements such as a title page, table of contents, confidentiality statement, introduction, and report-specific title pages. Each of these is customizable.

You have the same options that you do with a single transcript report. Your report can include the full transcript with or without annotations or just the annotations alone, and options to print with redactions. See also Printing Annotation Digest Reports.

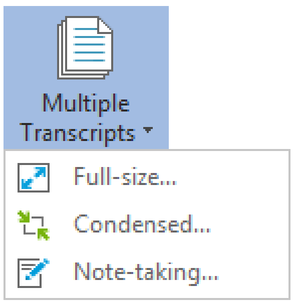
All ReportBooks reports can be saved, printed, or emailed as PDFs. See Selecting print output options.

To view a complete listing of all possible TextMap report and ReportBooks examples, click the link on the ReportBook wizard's Welcome page. Scan the report listing by topic and then click the link for the report example you want to view.

To print a multiple transcript report

1. On the **Reports** ribbon, click **Multiple Transcripts**.

   You can also click Print on the File menu, and then click Multiple Transcripts.

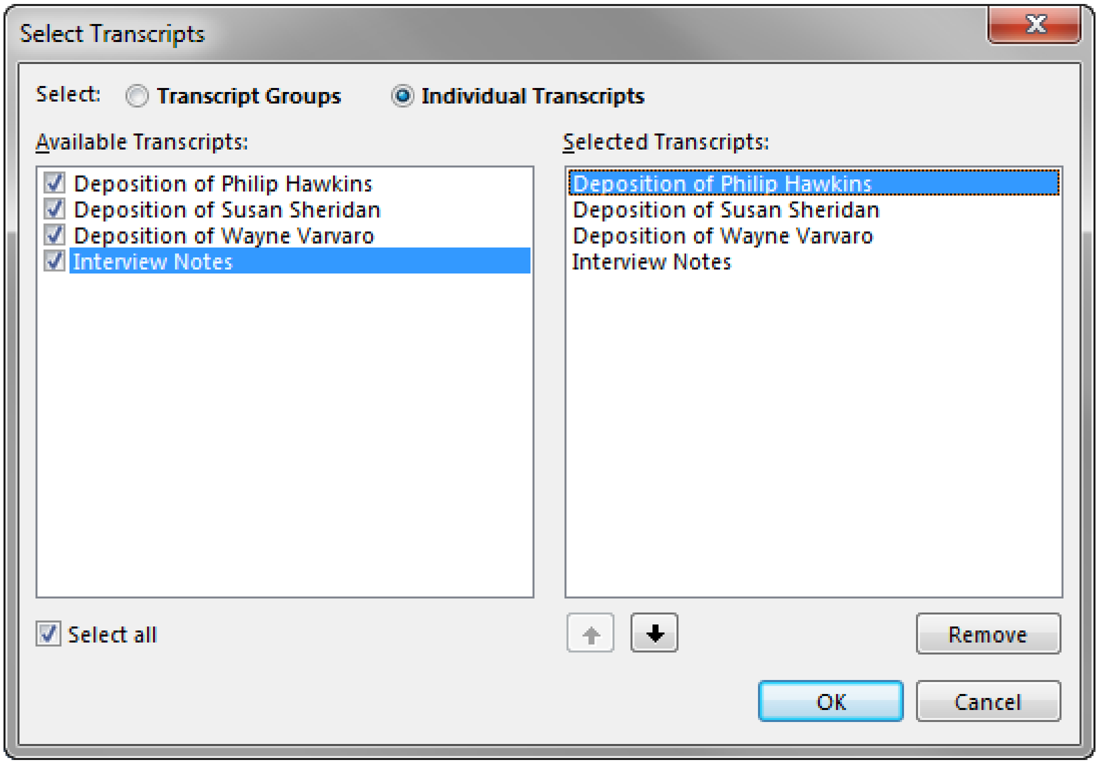
2. On the **Multiple Transcripts** submenu, click **Full-size**, **Condensed**, or **Note-taking**.

   See Understanding layout options for details.

3. On the **Transcripts ReportBook Wizard's Welcome** page, click **Next**.

4. On the **Select Transcripts** page, review the transcripts and transcripts groups you want to include in the report.

   Click the Modify button to select or remove transcripts/groups from the report, or change the order that selected transcripts/groups will print in the report.



In the Selected Transcripts dialog box, click Transcripts Groups or Individual Transcripts.

In the Available Groups box, select or clear the check boxes for the transcripts or groups you want to include or remove.

In the Selected Transcripts box, click the Up/Down buttons to organize transcripts in the order you want. Click OK to save your changes, then click OK to save your changes.

5. On the **Select Transcript** page, click **Next**.

6. On the **Options** page, select or clear the ReportBook options you want to include, or highlight an option in the list and click the edit button to make applicable changes and then click **Next**.

   See Modifying ReportBook title pages.

7. On the **Highlight Annotations** page, choose one of the following:

   - No, do not highlight annotations.
   - Yes, highlight all annotations.
   - Yes, highlight annotations linked to selected issues.

     In the Select issues to include box, select the check box next to each issue you want to include.

9. Click **Next** to continue.

10. On the **Include Redactions** page, choose one of the following:

    - Yes, to burn in redacted text to the printed report.

- No, to not include burned redactions into the printed report.

  See Changing page setup options for details on applying the redaction color and reasons.

11. On the **Completing the Transcripts ReportBook Wizard** page, click **Finish** to generate the report.

12. In the **Print** dialog box, under **Destination**, click the print output you want.

    The print options will change depending on your selection. See Selecting print output options.

We recommend you select Preview first to verify your report before printing a hard copy or saving the report as a PDF file. You can select your print options from the Print Preview toolbar.

12. Select additional print options, then click **OK**.

To print multiple transcripts with annotations

1. On the **Multiple Transcript Report** tab of the **Reports** ribbon, click **Transcripts w/ Annotations**.

2. On the **Transcripts w/ Annotations** submenu, click **Footnotes**, **Endnotes - Full-size Transcript**, or **Endnotes - Condensed Transcript**.

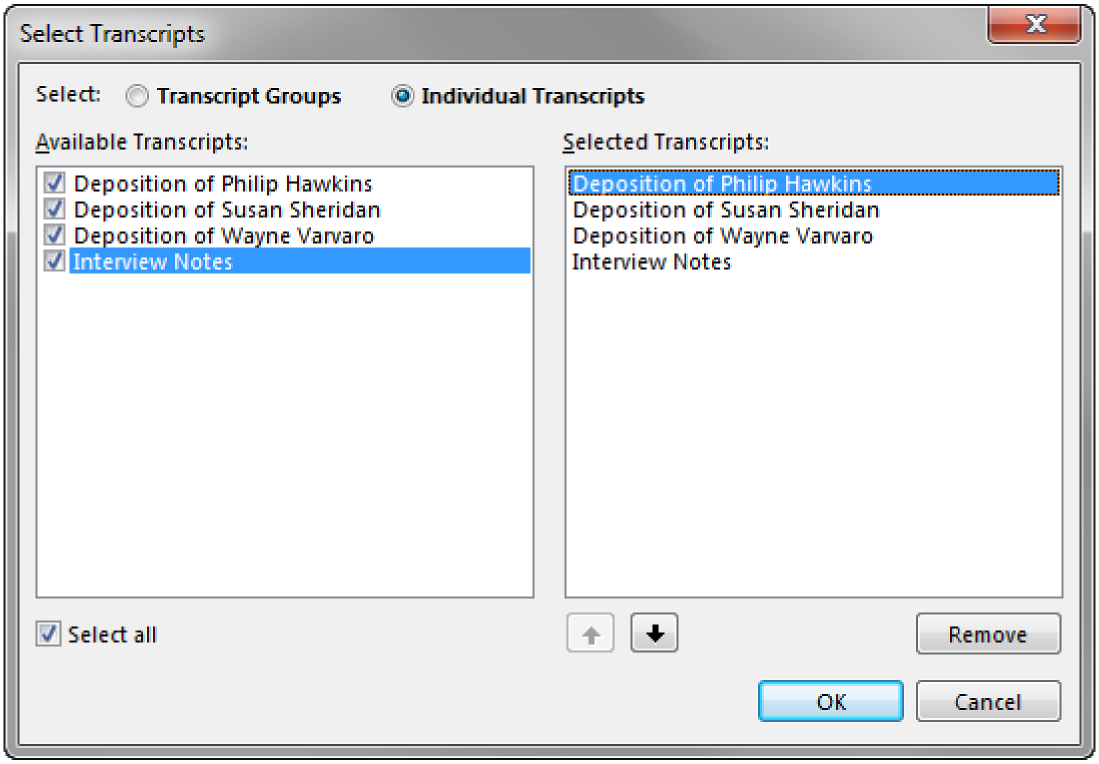
   You can also click Print on the File menu, and then click Multiple Transcripts.

   See Understanding layout options for details.

3. On the **Transcripts ReportBook Wizard's Welcome** page, click **Next**.

4. On the **Select Transcripts** page, review the transcripts and transcripts groups you want to include in the report.

   Optional: Click the Modify button to select or remove transcripts/groups from the report, or change the order that selected transcripts/groups will print in the report.



In the Selected Transcripts dialog box, click Transcripts Groups or Transcripts.

In the Available Groups box, select or clear the check boxes for the transcripts or groups you want to include or remove.

In the Selected Transcripts box, click the Up/Down buttons to organize transcripts in the order you want. Click OK to save your changes, then click OK to save your changes.

5. On the **Select Transcript** page, click **Next**.

6. On the **Options** page, select or clear the ReportBook options you want to include, then click **Next**.

   See [Modifying ReportBook title pages](#).

7. On the **Limit Annotations by Issue** page, choose one of the following:

   - Yes, include all annotations.
   - No, only include annotations linked to the selected issues.

     In the Select issues to include box, select the check box next to each issue you want to include.

9. Click **Next**.

10. On the **Include Redactions** page, choose one of the following:

    - Yes, to burn in redacted text to the printed report.
    - No, to not include burned redactions into the printed report.

See Changing page setup options for details on applying the redaction color and reasons.

11. On the **Linked CaseMap Facts** page, choose one of the following:
    - Yes, include linked facts.
    - No, do not include linked facts.

    To include facts from CaseMap, you must first have the corresponding case open in CaseMap.

By default TextMap includes three of CaseMap's Facts spreadsheet fields in reports: Date & Time, Fact Text, and Status. To customize CaseMap fields included in TextMap reports, see the Changing page setup options topic, Steps 8-10.

11. Click **Next**.
12. On the **Completing the Report Wizard** page, click **Finish** to generate the report.
13. In the **Print** dialog box, under **Destination**, click the print output you want.

    The print options will change depending on your selection. See Selecting print output options.

We recommend you select Preview first to verify your report before printing a hard copy or saving the report as a PDF file. You can select your print options from the Print Preview toolbar.

14. Select additional print options, then click **OK**.

Related Topics

About reports
Selecting print output options
Understanding layout options
Printing single transcripts
Printing Annotation Digests
Modifying ReportBook title pages

Printing Annotation Digests

Annotation Digests are ReportBooks that include various components: annotation transcript text, annotation notes, linked issues, and linked files.

TextMap offers three Annotation Digest Reports:

- **All Annotations** — includes all annotations and notes from a set of ReportBooks and can be filtered by issue.
- **Search Notes** — includes search search hits located in transcripts included in the ReportBook. The ReportBook can be filtered by issues linked to the annotations that have notes matching your search.
- **What's New** — includes annotations that have been created on or after a date that you specify. There's an option to include annotations updated since the chosen date.

TextMap Annotation Digest with Facts Report

Case Name: Phillip Hawkins v. Anstar Biotech Industries
Transcript: [5/23/2003] Deposition of Wayne Varvaro

Pg: 4 Ln: 24 - Pg: 5 Ln: 4

Annotation:

```
4:24       Q.   During that time frame, had the county done any
  25   work in that area?
5: 1       A.   There was -- I don't have specific dates, but
   2   there was times that the water main within the Waverly
   3   Place did have breaks in it that required shutting down
   4   the water and doing repairs.
```

Note: The county did repairs several times in Waverly Place that required turning off water for repairs.

Linked Issues: Damages

Pg: 5 Ln: 13 - 18

Annotation:

```
5:13       Q.   Okay.  Thank you.  And what would the county
  14   have been doing out there to begin with?
  15       A.   The county would get a call saying that there
  16   was water coming up out of the ground, and we would go in
  17   and shut the main off and cut the asphalt or concrete and
  18   make repairs and turn the water service back on.
```

Note: Varvaro explains the process re how the county handles reports of water main leaks.

Linked Issues: Pattern&Practice

CaseMap Fact:

Date & Time: To Be Determined
Fact Text: Varvaro explains the process re how the county handles reports of water main leaks.
[Q. Okay. Thank you. And what would the county
have been doing out there to begin with?
A. The county would get a call saying that there
was water coming up out of the ground, and we would go in
and shut the main off and cut the asphalt or concrete and
make repairs and turn the water service back on.]

Pg: 7 Ln: 13 - 17

Annotation:

```
7:13       A.   No, sir.  We don't touch the individual
  14   service.  We just shut the main itself, because when we
  15   shut the main, it shuts any water that's flowing into the
  16   homeowner's, so we don't touch the individual valve for
  17   the homeowner's.
```

Note: County does not turn individual homeowner water valves on or off during repairs.

Linked Issues: Background

1/17/2014 1:42 PM Page 13 of 16

TextMap Annotation Digest with Facts Report

Case Name: Phillip Hawkins v. Anstar Biotech Industries
Transcript: [10/21/2000 10:00 AM] Deposition of Philip Hawkins
What's New Since: 1/10/2014

Pg: 4 Ln: 14 - 24

Annotation:
Created: 1/17/2014 2:05 PM

```
Q    Would you state your full name, please?
A    Philip Mark Hawkins.
Q    And your date of birth?
A    October 13th, 1959.
Q    Are you 40?
A    Yes, ma'am.
Q    Your current address?
A    2646 East Cloud Street, Palm Beach,
Florida.  The ZIP Code is 32980.
Q    How long have you lived at that address?
A    Approximately six years.
```

Note: Basic information about the witness

Linked Issues: Background

Linked Files: Exhibit 1

CaseMap Fact:

Date & Time: To Be Determined
Fact Text: Basic information about the witness
[Q Would you state your full name, please?
A Philip Mark Hawkins.
Q And your date of birth?
A October 13th, 1959.
Q Are you 40?
A Yes, ma'am.
Q Your current address?
A 2646 East Cloud Street, Palm Beach,
Florida. The ZIP Code is 32980.
Q How long have you lived at that address?
A Approximately six years.]

Pg: 33 Ln: 22 - 25

Annotation:
Created: 1/17/2014 2:02 PM

```
Q    Okay.  Do you know, have you actually filed
a lawsuit, or are you trying to settle without filing
lawsuit?
A    Without; trying to settle.
```

Linked Issues: Background

1/17/2014 2:06 PM Page 6 of 6

Using the Annotation Digest ReportBook Wizard, you can select the transcripts or transcript groups you want to include in the report and modify the order in which you want them to print. You can also customize the order in which you want annotation sections to print, as well as choose whether to include linked CaseMap facts in the report. The default is for all sections to be included in the report. Clear the sections you do not want in your report. Default settings will be restored the next time you want to print the report. Page and line numbers print for all annotations in all reports.

You can also choose to burn in redactions. This allows you to print the Annotation Digest Reports without disclosing sensitive, redacted, information.

Annotation Digests automatically skip any transcripts that do not include annotations. No title page or annotation page will printed for these transcripts. This functionality does not apply to Microsoft Word report options.

Each digest report can be printed or saved as a PDF file using TextMap's built-in PDF writer (does not require a full Acrobat license). Or you have the option to print the reports directly to Microsoft® Word. See Printing to Microsoft Word.

To view a complete listing of all possible TextMap report and ReportBooks examples, click the link on the ReportBook wizard's Welcome page. Scan the report listing by topic and then click the link for the report example you want to view.

If you are using both TextMap and CaseMap for your case and you want to make annotations first, review the results from TextMap in a hard copy of the PDF and then send selected annotations to CaseMap later.

To print an Annotation Digest Report with All Annotations

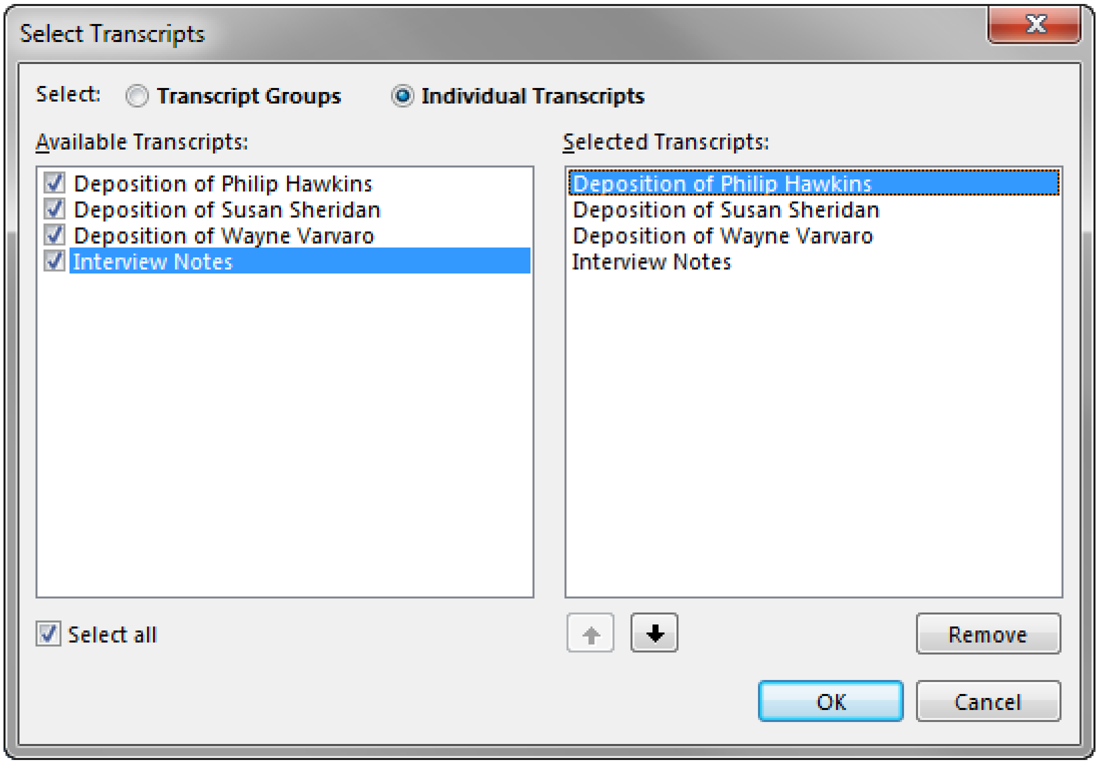
1. On the **Reports** ribbon, on the **Current or Multiple Transcripts Report** tab, click **Annotation Digest**.

   You can also click Print on the File menu, and then click Current Transcript.

2. On the **Annotation Digest - All Annotations ReportBook Wizard's Welcome** page, click **Next**.

3. On the **Select Transcripts** page, review the transcripts and transcripts groups you want to include in the report.

   Click the Modify button to select or remove transcripts/groups from the report, or change the order that selected transcripts/groups will print in the report.



In the Select Transcripts dialog box, click Transcripts Groups or Transcripts.

In the Available Groups box, select or clear the check boxes for the transcripts or groups you want to include or remove.

In the Selected Transcripts box, click the Up/Down buttons to organize transcripts in the order you want. Click OK to save your changes, then click OK to save your changes.

4. On the **Select Transcripts** page, click **Next**.

5. On the **Options** page, select or clear the ReportBook options you want to include.

   See Modifying ReportBook title pages.

6. Click **Next**.

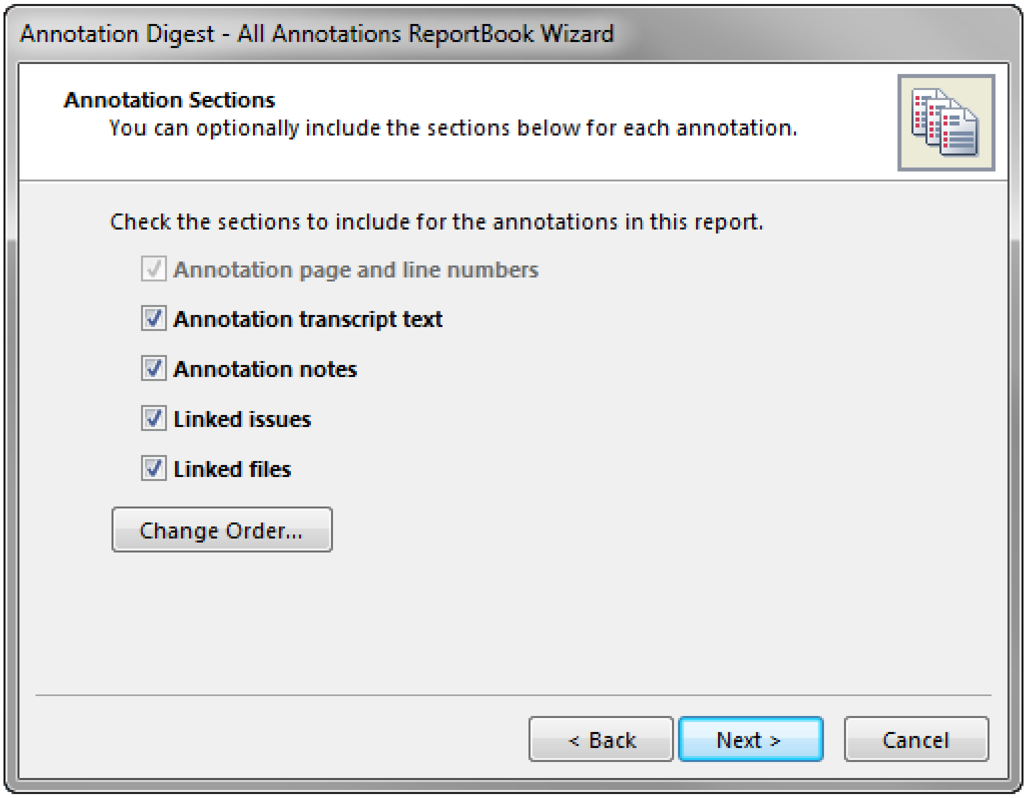
7. On the **Limit Annotations by Issue** page, choose one of the following:

   - Yes, include all annotations.
   - No, only include annotations linked to the selected issues.

     In the Select issues to include box, select the check box next to each issue you want to include.

8. Click **Next**.

9. On the **Annotation Sections** page, select or clear the check boxes for the annotation sections you want to include.



Click the Change Order button to modify the order that sections print in the report.

In the Change Order dialog box, click the Move Up and Move Down button to organize the sections in the order you want them to print, then click OK. The Annotation page and line number section cannot be re-organized and will always print as the first section.

10. On the **Annotation Sections** page, click **Next**.

11. On the **Include Redactions** page, choose one of the following:

    - Yes, to burn in redacted text to the printed report.
    - No, to not include burned redactions into the printed report.

    See Changing page setup options for details on applying the redaction color and reasons.

12. Click **Next**.

13. On the **Linked CaseMap Facts** page, choose one of the following:

    - Yes, include linked facts.
    - No, do not include linked facts.

      To include facts from CaseMap, you must first have the corresponding case open in CaseMap.

By default TextMap includes three of CaseMap's Facts spreadsheet fields in reports: Date & Time, Fact Text, and Status. To customize CaseMap fields included in TextMap reports, see the Changing page setup options topic, Steps 8-10.

14. Click **Next**.

15. On the **Completing the Annotation Digest - All Annotations ReportBook Wizard** page, click **Finish** to generate the report.

16. In the **Print** dialog box, under **Destination**, click the print output you want.

    The print options will change depending on your selection. See [Selecting print output options](#).

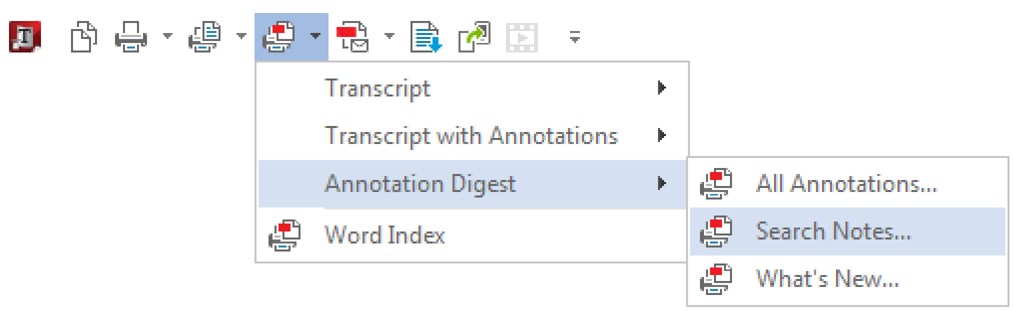
> We recommend you select Preview first to verify your report before printing a hard copy or saving the report as a PDF file. You can select your print options from the Print Preview toolbar.

17. Select additional print options, then click **OK**.

To print the Annotation Digest Report with Search Notes

1. On the **Quick Access** toolbar, click **Print to PDF (File)** icon, and then click **Annotation Digests**.

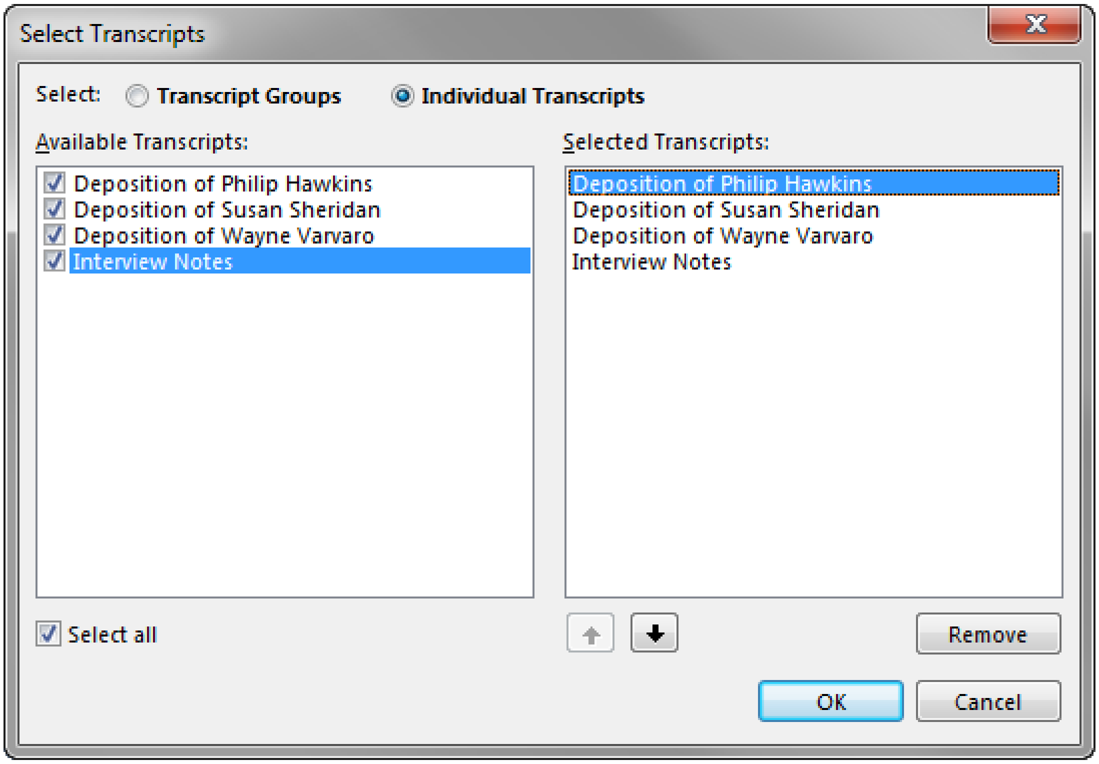
2. On the **Annotations Digests** submenu, click **Search Notes**.



3. On the **Annotation Digest - Search Notes ReportBook Wizard's Welcome** page, click **Next**.

4. On the **Select Transcripts** page, review the transcripts and transcripts groups you want to include in the report.

   Click the Modify button to select or remove transcripts/groups from the report, or change the order that selected transcripts/groups will print in the report.



In the Selected Transcripts dialog box, click Transcripts Groups or Transcripts.

In the Available Groups box, select or clear the check boxes for the transcripts or groups you want to include or remove.

In the Selected Transcripts box, click the Up/Down buttons to organize transcripts in the order you want. Click OK to save your changes, then click OK to save your changes.

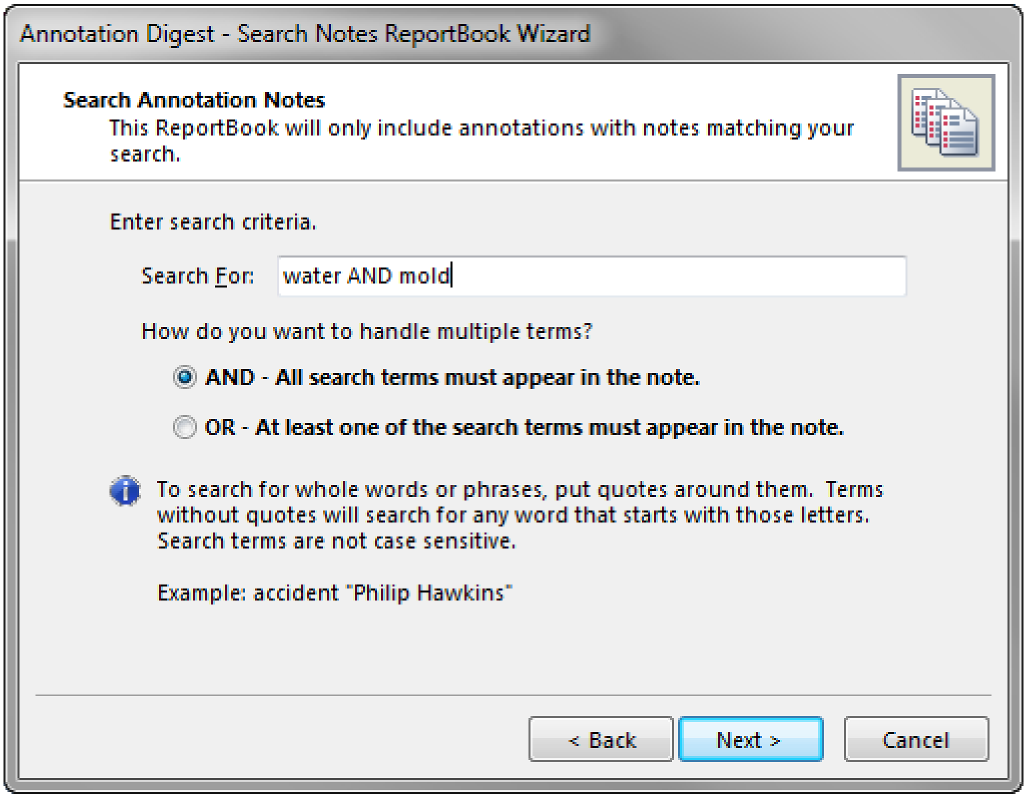
1. On the **Select Transcripts** page, click **Next**.

5. On the **Options** page, select or clear the ReportBook options you want to include.

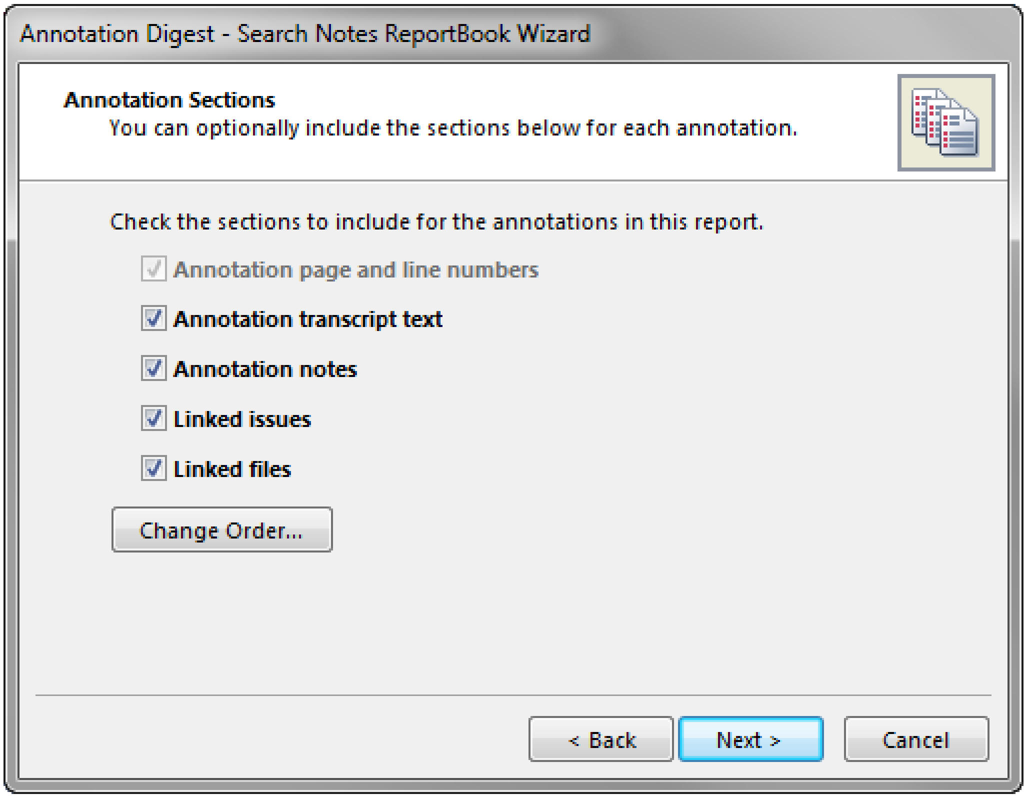
   See Modifying ReportBook title pages.

6. Click **Next**.

7. On the **Search Annotation Notes** page, type in your search query in the **Search For** field.



8. Select the type of search you want:
   - AND - All search terms must appear in the note.
   - OR - At least one of the search terms must appear in the note.
9. Click **Next**.
10. On the **Annotation Sections** page, select or clear the check boxes for the annotation sections you want to include.



Click the Change Order button to modify the order that sections print in the report.

In the Change Order dialog box, click the Move Up and Move Down button to organize the sections in the order you want them to print, then click OK. The Annotation page and line number section cannot be re-organized and will always print as the first section.

11. On the **Limit Annotations by Issue** page, choose one of the following:
    - Yes, include all annotations.
    - No, only include annotations linked to the selected issues.

      In the Select issues to include box, select the check box next to each issue you want to include.
12. Click **Next**.
13. On the **Include Redactions** page, choose one of the following:
    - Yes, to burn in redacted text to the printed report.
    - No, to not include burned redactions into the printed report.

    See Changing page setup options for details on applying the redaction color and reasons.
14. On the **Linked CaseMap Facts** page, choose one of the following:
    - Yes, include linked facts.
    - No, do not include linked facts.

      To include facts from CaseMap, you must first have the corresponding case open in CaseMap.

15. Click **Next**.

16. On the **Completing the Annotation Digest - Search Notes ReportBook Wizard** page, click **Finish** to generate the report.

17. In the **Print** dialog box, under **Destination**, click the print output you want.

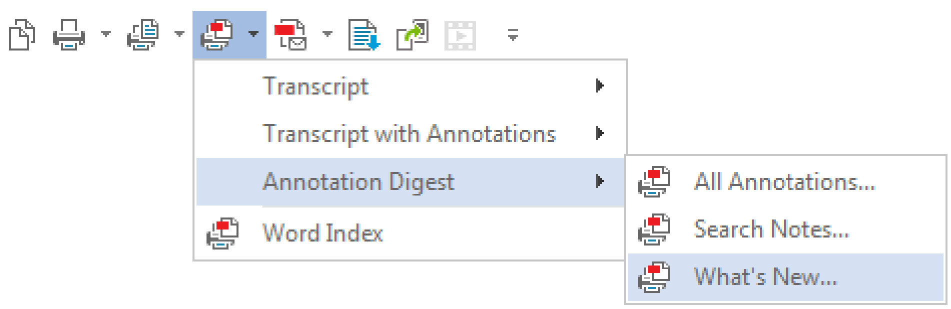
    The print options will change depending on your selection. See Selecting print output options.

> We recommend you select Preview first to verify your report before printing a hard copy or saving the report as a PDF file. You can select your print options from the Print Preview toolbar.

18. Select additional print options, then click **OK**.

To print the Annotation Digest Report with What's New

1. On the **Quick Access** toolbar, click **Print to PDF (File)**  icon, and then click **Annotation Digests**.

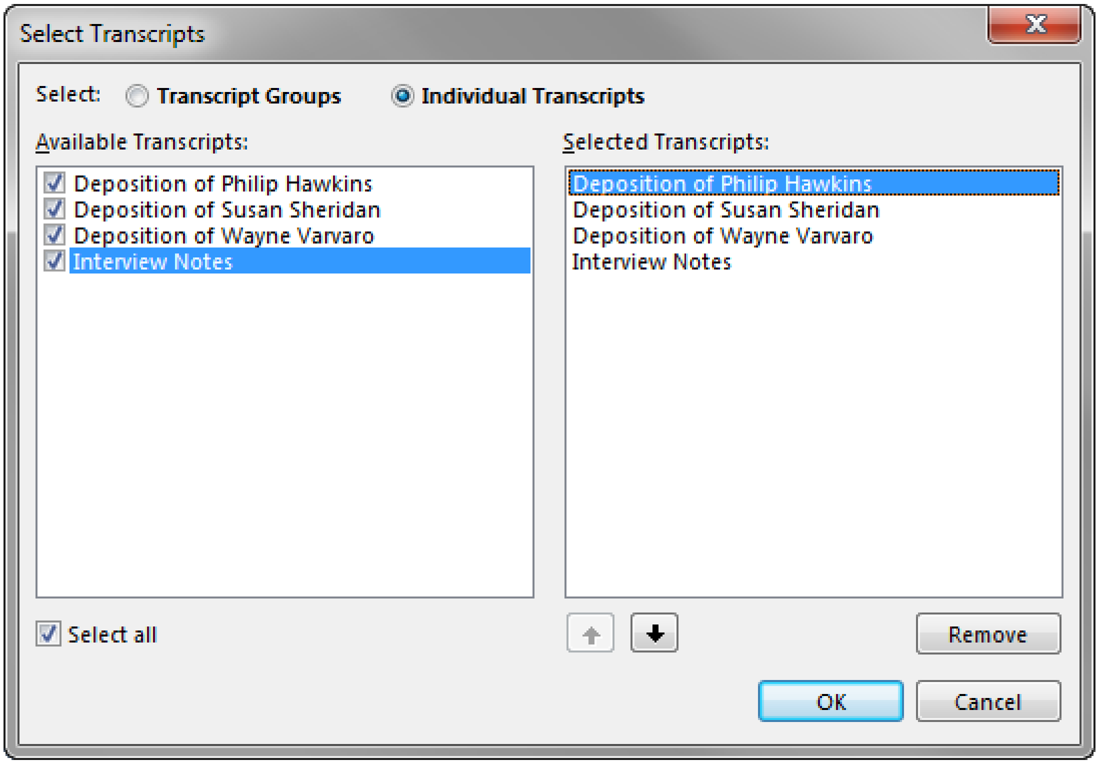


2. On the **Annotation Digests** submenu, click **What's New**.

3. On the **Annotation Digest - What's New ReportBook Wizard's Welcome** page, click **Next**.

4. On the **Select Transcripts** page, review the transcripts and transcripts groups you want to include in the report.

   Click the Modify button to select or remove transcripts/groups from the report, or change the order that selected transcripts/groups will print in the report.



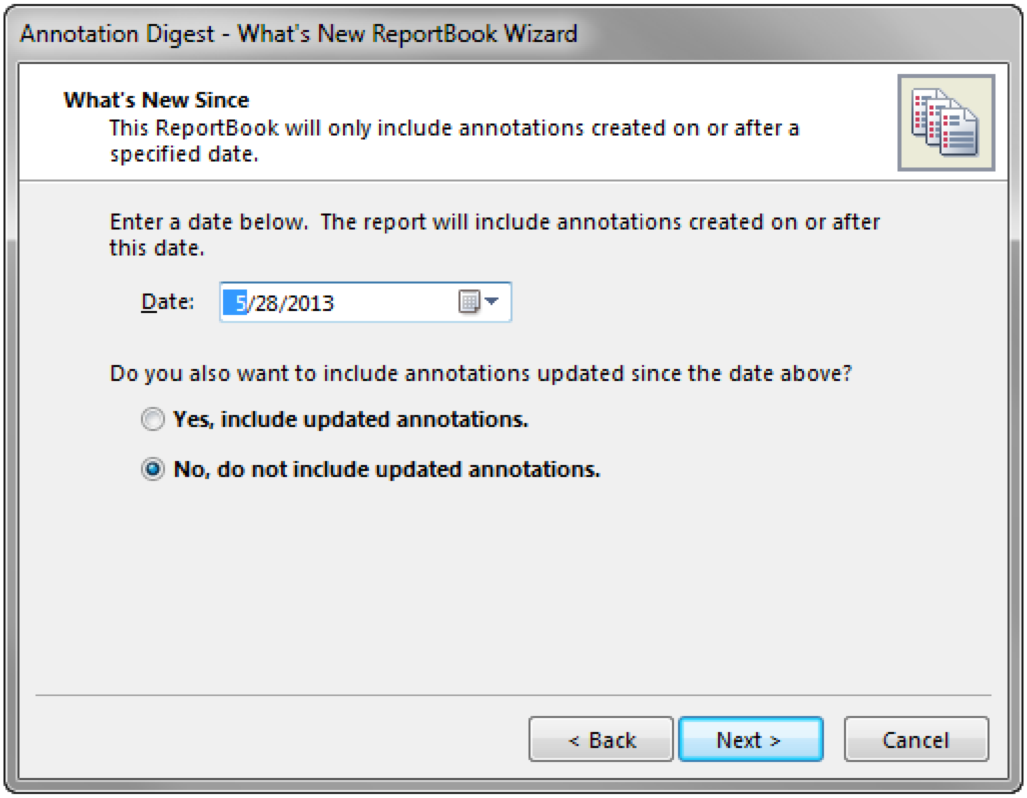
In the Selected Transcripts dialog box, click Transcripts Groups or Transcripts.

In the Available Groups box, select or clear the check boxes for the transcripts or groups you want to include or remove.

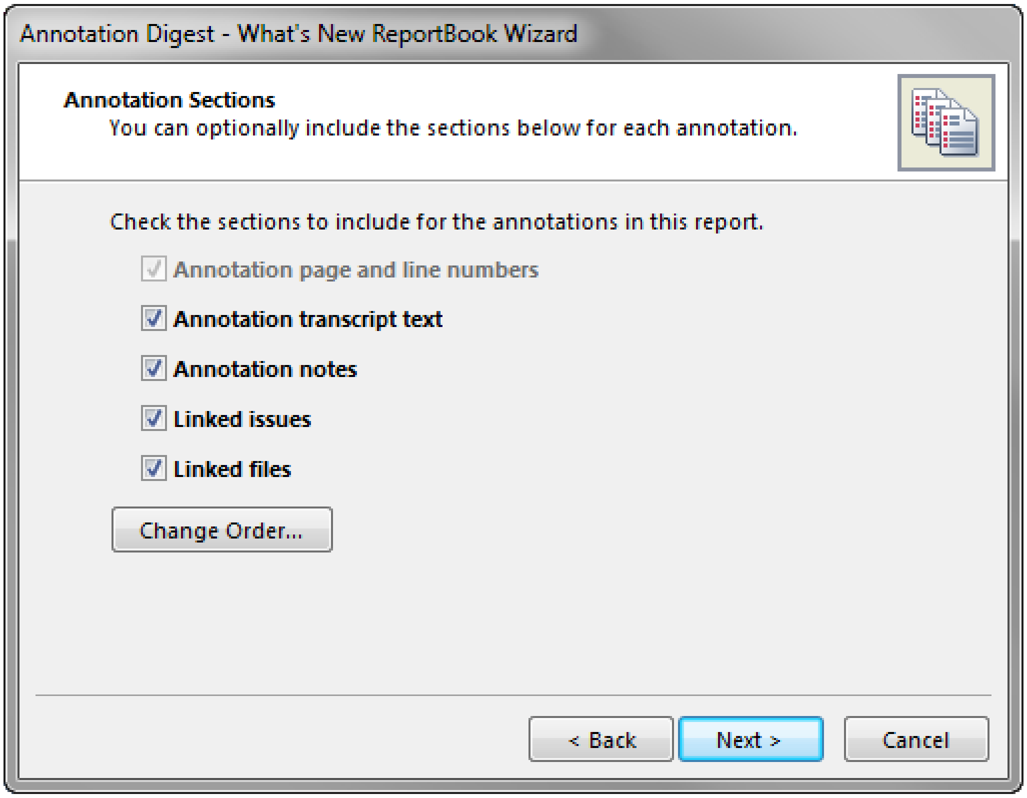
In the Selected Transcripts box, click the Up/Down buttons to organize transcripts in the order you want. Click OK to save your changes, then click OK to save your changes.

5. On the **Select Transcripts** page, click **Next**.
6. On the **Options** page, select or clear the ReportBook options you want to include.

   See Modifying ReportBook title pages.
7. Click **Next**.
8. On the **What's New Since** page, type on the calendar arrow for the **Date** field to select the date you want.



9. Select whether to include updated annotations:
   - Yes, include updated annotations.
   - No, do not include updated annotations.
10. Click **Next**.
9. On the **Annotation Sections** page, select or clear the check boxes for the annotation sections you want to include.



Click the Change Order button to modify the order that sections print in the report.

In the Change Order dialog box, click the Move Up and Move Down button to organize the sections in the order you want them to print, then click OK. The Annotation page and line number section cannot be re-organized and will always print as the first section.

12. On the **Limit Annotations by Issue** page, choose one of the following:

    - Yes, include all annotations.
    - No, only include annotations linked to the selected issues.

      In the Select issues to include box, select the check box next to each issue you want to include.

13. Click **Next**.

14. On the **Include Redactions** page, choose one of the following:

    - Yes, to burn in redacted text to the printed report.
    - No, to not include burned redactions into the printed report.

    See Changing page setup options for details on applying the redaction color and reasons.

15. On the **Linked CaseMap Facts** page, choose one of the following:

    - Yes, include linked facts.
    - No, do not include linked facts.

      To include facts from CaseMap, you must first have the corresponding case open in CaseMap.

16. Click **Next**.

17. On the **Completing the Annotation Digest - What's New ReportBook Wizard** page, click **Finish** to generate the report.

18. In the **Print** dialog box, under **Destination**, click the print output you want.

    The print options will change depending on your selection. See Selecting print output options.

We recommend you select Preview first to verify your report before printing a hard copy or saving the report as a PDF file. You can select your print options from the Print Preview toolbar.

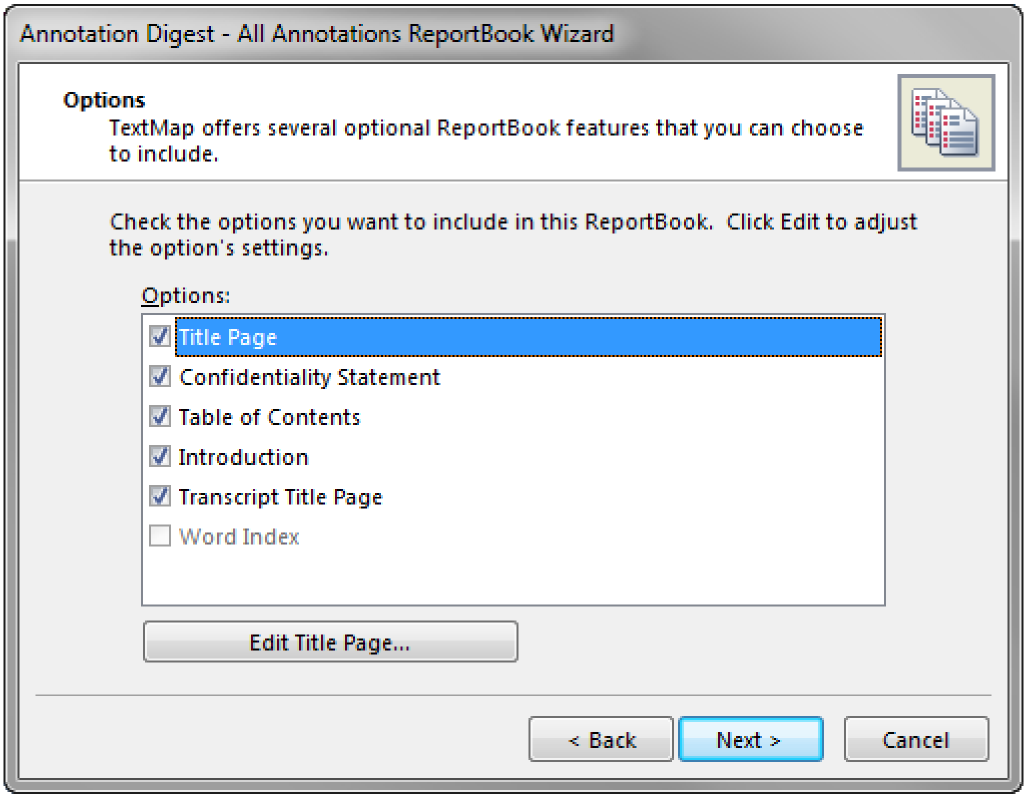
19. Select additional print options, then click **OK**.

Related Topics

About reports
Selecting report options
Printing to Microsoft Word

Modifying ReportBook title pages

Multiple transcript reports and Annotation Digests include a title page, confidentiality statement, table of contents, introduction, and transcript title page. Each of these can be modified according to your organization's needs on the ReportBook Wizard's Option page.

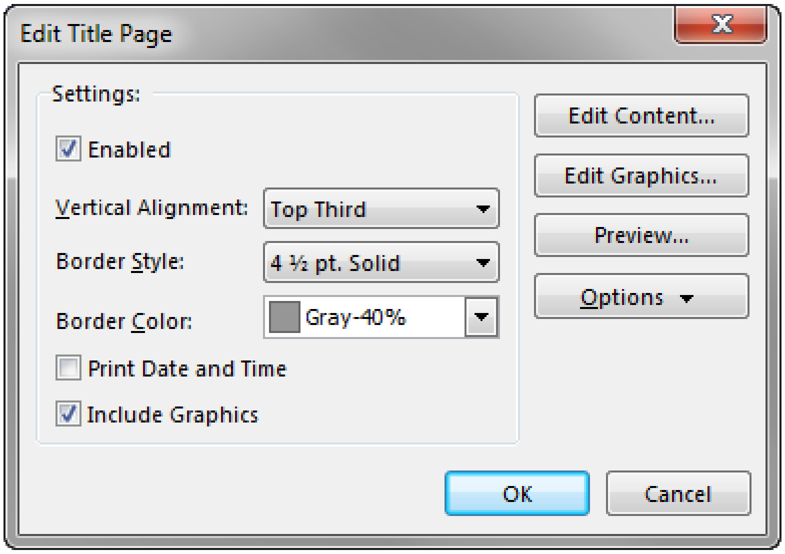


To modify the title page

1. On the **Reports** ribbon, click **Multiple Transcripts**.

   You can also click Print on the File menu, and then click Multiple Transcripts.

2. On the **Multiple Transcripts** submenu, click **Full-size**, **Condensed**, or **Note-taking** to open the wizard.
3. Click **Next** to continue.
4. n the **Select Transcripts** dialog box, click **Next** to continue.
5. On the **Options** page, ensure **Title Page** is selected.
6. Click the **Edit Title Page** button.
7. In the **Edit Title Page** dialog box, under **Settings**:



- Select the **Enabled** check box to use TextMap's default title page layouts.
- In the **Vertical Alignment** list, click on the alignment option you want: **Top**, **Top Third**, **Middle**, **Bottom Third**, **Bottom**.
- In the **Border Style** list, click the point size for the border width.
- In the **Border Color** list, click the color scale you want to use.
- Select check boxes to include **Print Date and Time** and **Include Graphics**.

8. Click the **Edit Graphics** button to preview current graphics, and modify the header and footer graphic settings. You can also remove, load, and save graphics for title pages.

Changes to graphics affect all users and reports in the case.

9. Click the **Preview** button to review changes you make before saving and printing the report, then click **Close**.

10. Click the **Options** button if you want to load TextMap's default settings.

11. Click **OK** to save the settings.

To modify the confidentiality statement

1. On the **Options** page, click **Confidentiality Statement**.

2. Click the **Edit Confidentiality Statement** button.

3. In the **Edit Confidentiality Statement** dialog box, under **Settings**:
   - Select the **Enabled** check box to use TextMap's default page layout.
   - In the **Vertical Alignment** list, click on the alignment option you want: **Top**, **Top Third**, **Middle**, **Bottom Third**, **Bottom**.
   - In the **Border Style** list, click the point size for the border width.
   - In the **Border Color** list, click the color scale you want to use.
   - Select check boxes to include **Print Date and Time** and **Include Graphics**.

Settings made here only affect the confidentiality statement and not changes made to the same settings when you click the Title Page or Introduction buttons.

4. Click the **Edit Content** button to modify text as well as font size and style, symbols, and fields using the toolbar buttons, then click **OK**.

5. Click the **Edit Graphics** button to preview current graphics, and modify the header and footer graphic settings. You can also remove, load, and save graphics for title pages.

Changes to graphics affect all users and reports in the case.

6. Click the **Preview** button to review your changes, then click **Close**.
7. Click the **Options** button if you want to load TextMap's default settings.
8. Click **OK** to save the changes.

To modify the table of contents

1. On the **Options** page, click **Table of Contents**.
2. Click the **Edit Table of Contents** button.
3. In the **Edit Table of Contents** dialog box, under **Settings**:
   - Select the **Enabled** check box to use TextMap's default settings.
   - In the **Border Style** list, click the point size for the border width.
   - In the **Border Color** list, click the color scale you want to use.
   - Select check boxes to include **Print Date and Time**.

   The Vertical Alignment and Include Graphics options are disabled for editing.
4. Click the **Edit Content** button to modify text as well as font size and style, symbols, and fields using the toolbar buttons, then click **OK**.

1. Click the **Preview** button to review your changes, then click **Close**.
2. Click the **Options** button if you want to load TextMap's default settings.
3. Click **OK** to save the changes.

To modify the introduction

1. On the **Options** page, click **Introduction**.
2. Click the **Edit Introduction** button.
3. In the **Edit Introduction** dialog box, under **Settings**:
   - Select the **Enabled** check box to use TextMap's default page layout.
   - In the **Vertical Alignment** list, click on the alignment option you want: **Top**, **Top Third**, **Middle**, **Bottom Third**, **Bottom**.

- In the **Border Style** list, click the point size for the border width.
- In the **Border Color** list, click the color scale you want to use.
- Select check boxes to include **Print Date and Time** and **Include Graphics**.

4. Click the **Edit Content** button to modify text as well as font size and style, symbols, and fields using the toolbar buttons, then click **OK**.

6. Click the **Edit Graphics** button to preview current graphics, and modify the header and footer graphic settings. You can also remove, load, and save graphics for title pages.

> Changes to graphics affect all users and reports in the case.

7. Click the **Preview** button to review your changes, then click **Close**.

8. Click the **Options** button if you want to load TextMap's default settings.

9. Click **OK** to save the changes.

To modify the transcript title page

1. On the **Options** page, click **Transcript Title Page**.

2. Click the **Edit Transcript Title Page** button.

3. In the **Edit Transcript Title Page** dialog box, under **Settings**:
   - Select the **Enabled** check box to use TextMap's default page layout.
   - In the **Vertical Alignment** list, click on the alignment option you want: **Top**, **Top Third**, **Middle**, **Bottom Third**, **Bottom**.
   - In the **Border Style** list, click the point size for the border width.
   - In the **Border Color** list, click the color scale you want to use.
   - Select check boxes to include **Print Date and Time** and **Include Graphics**.

4. Click the **Edit Content** button to modify text as well as font size and style, symbols, and fields using the toolbar buttons, then click **OK**.

6. Click the **Edit Graphics** button to preview current graphics, and modify the header and footer graphic settings. You can also remove, load, and save graphics for title pages.

> Changes to graphics affect all users and reports in the case.

7. Click the **Preview** button to review your changes, then click **Close**.

8. Click the **Options** button if you want to load TextMap's default settings.

9. Click **OK** to save the changes.

Related Topics

About reports

[Adding/editing title pages](#)
[Printing multiple transcripts](#)
[Printing Annotation Digests](#)

Printing to Microsoft Word

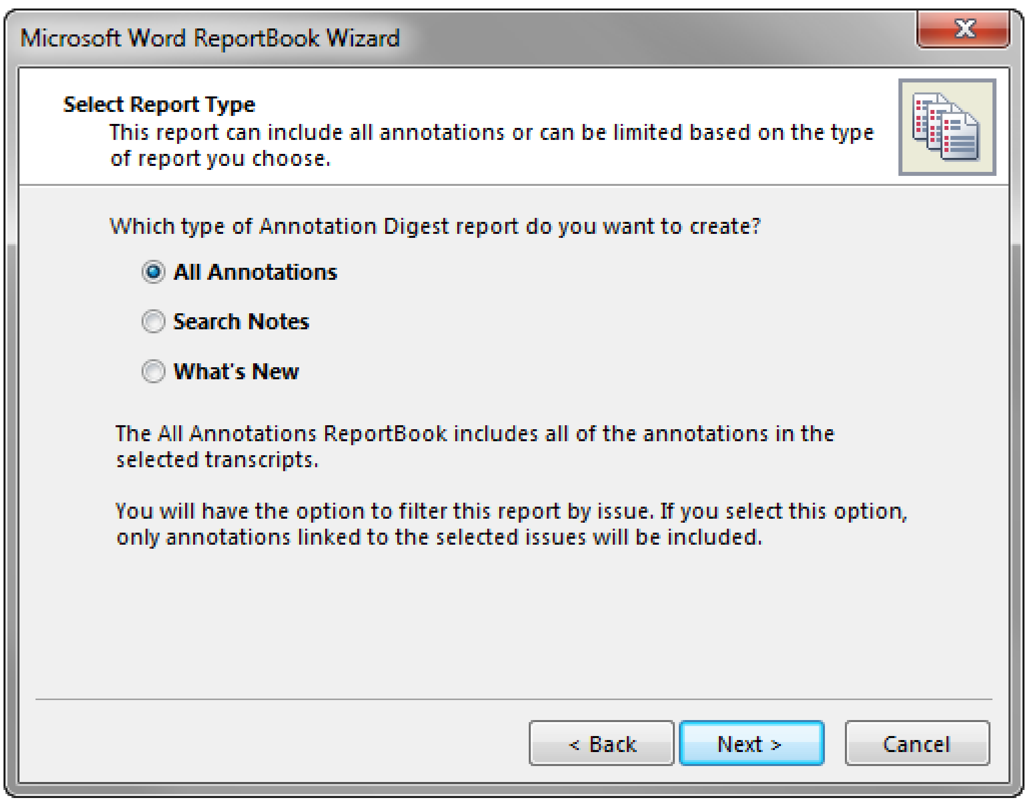
The Print to Microsoft Word feature prints any Annotation Digest report directly into a Word document.

To print Annotation Digests - All Annotations to Word

1. In the **Transcripts** pane, click on the transcript you want to print to Word.
2. On the **Reports** menu:

   For Current Transcript: Click Annotation Digest, and then click Print to Microsoft Word.

   For Multiple Transcripts: Click Annotation Digest, and then click Print to Microsoft Word.
3. On the **Microsoft Word ReportBook Wizard's Welcome** page, click **Next**.
4. On the **Select Report Type** page, verify that **All Annotations** is selected, then click **Next**.



5. On the **Select Transcripts** page, review the transcripts you want to include in the report.

   Click Modify to change the order of the transcripts in the Select Transcripts dialog box or add more transcripts to the report.

   On the **Select Transcripts** page, click **Next**.

7. On the **Limit Annotations by Issue** page, choose one of the following:
   - **Yes, include all annotations.**
   - **No, only include annotations linked to the selected issues.**

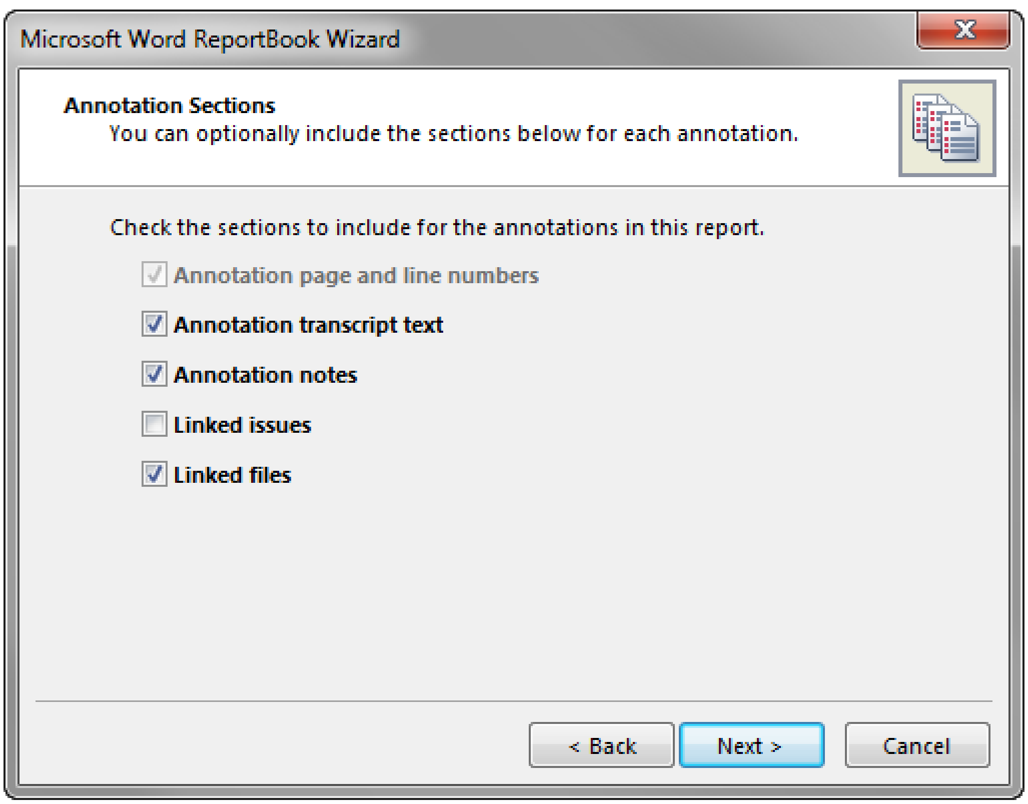
     In the Select issues to include box, select the check box next to each issue you want to include.

8. Click Next.

9. On the **Group Annotations by Issue** page, select whether to group annotations by issue or to sort by page and line number, then click **Next**.

> The Group Annotations by Issue is the default option and will group annotations on the report by their linked issues. This may result in an annotation being on the report multiple times. If you do not want to group annotations by issue select No, only sort by page and line number.

10. On the **Annotations Sections** page, select or clear the sections you want in the report.



1. On the **Include Redactions** page, choose one of the following:

- Yes
- No

See Changing page setup options for details on applying the redaction color and reasons.

12. On the **Linked CaseMap Facts** page, choose one of the following:
    - **Yes, include linked facts.**
    - **No, do not include linked facts.**

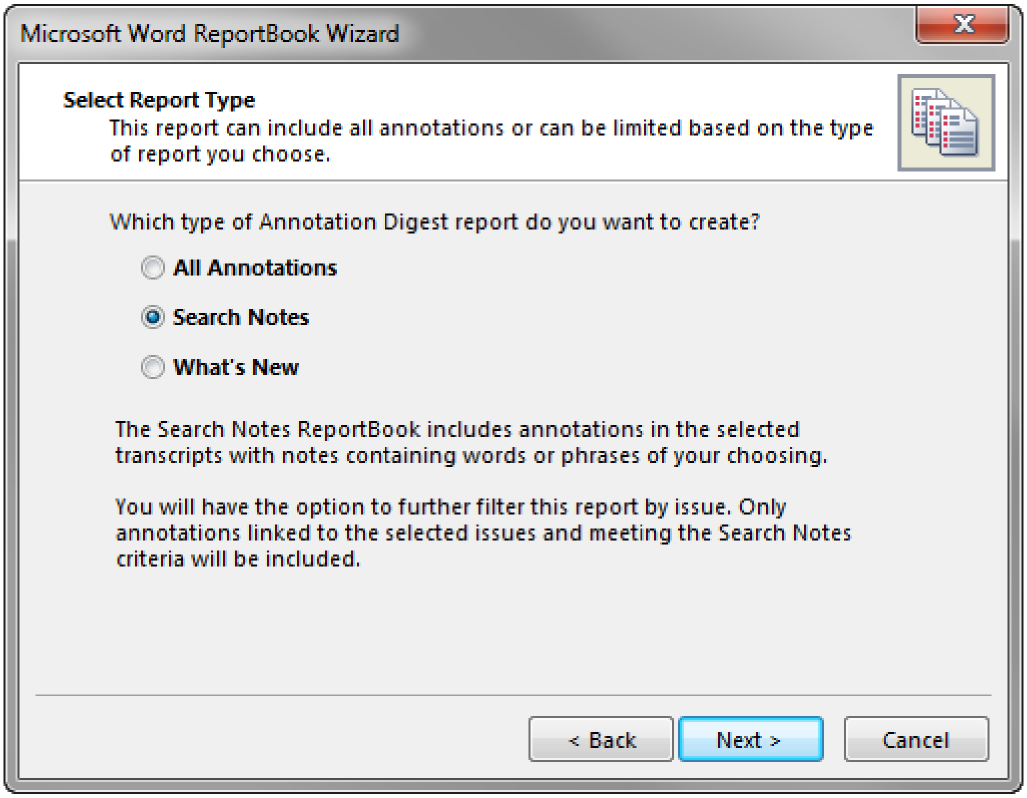
      To include facts from CaseMap, you must first have the corresponding case open in CaseMap.
13. Click **Next**.
14. On the **Completing the Microsoft Word ReportBook Wizard** page, click **Finish** to generate the report.
15. Preview the report in Word.
16. On the **File** menu, click **Save As** to name and save the report.

To print Annotation Digests - Search Notes to Word

1. In the **Transcripts** pane, click on the transcript you want to print to Word.
2. On the **Reports** menu:

   For Current Transcript: Click Annotation Digest, and then click Print to Microsoft Word.

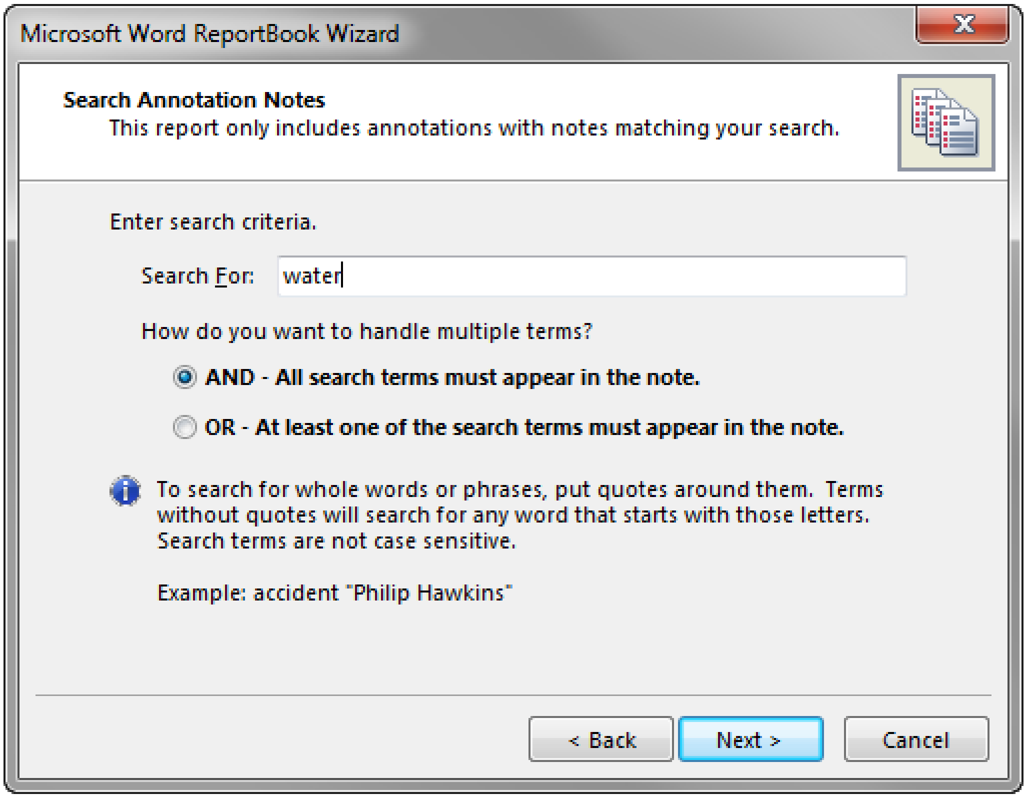
   For Multiple Transcripts: Click Annotation Digest, and then click Print to Microsoft Word.
3. On the **Microsoft Word ReportBook Wizard's Welcome** page, click **Next**.
4. On the **Select Report Type** page, verify that **Search Notes** is selected, then click **Next**.



5. On the **Select Transcripts** page, review the transcripts you want to include in the report.

   Click Modify to change the order of the transcripts in the Select Transcripts dialog box or add more transcripts to the report.

6. On the **Search Annotation Notes** page, type in your search criteria in the **Search For** box.



7. Under **How do you want to handle multiple items?**, select the search operator you want to use:
   - AND - All search terms must appear in the note.
   - OR - At least one of the search terms must appear in the note.
8. Click **Next**.
9. On the **Group Annotations by Issue** page, select whether to group annotations by issue or to sort by page and line number, then click **Next**.

> The Group Annotations by Issue is the default option and will group annotations on the report by their linked issues. This may result in an annotation being on the report multiple times. If you do not want to group annotations by issue select No, only sort by page and line number.

10. On the **Annotations Sections** page, select or clear the sections you want in the report, then click **Next**.

13. On the **Include Redactions** page, choose one of the following:
    - Yes
    - No

    See Changing page setup options for details on applying the redaction color and reasons.

14. On the **Limit Annotations by Issue** page, choose one of the following:

- **Yes, include all annotations.**
- **No, only include annotations linked to the selected issues.**

  In the Select issues to include box, select the check box next to each issue you want to include.

15. Click **Next**.

16. On the **Linked CaseMap Facts** page, choose one of the following:

    - **Yes, include linked facts.**
    - **No, do not include linked facts.**

    To include facts from CaseMap, you must first have the corresponding case open in CaseMap.

17. Click **Next**.

18. On the **Completing the Microsoft Word ReportBook Wizard** page, click **Finish** to generate the report.

19. Preview the report in Word.

20. On the **File** menu, click **Save As** to name and save the report.

To print Annotation Digests - What's New to Word

1. In the **Transcripts** pane, click on the transcript you want to print to Word.

2. On the **Reports** menu:

   For Current Transcript: Click Annotation Digest, and then click Print to Microsoft Word.

   For Multiple Transcripts: Click Annotation Digest, and then click Print to Microsoft Word.

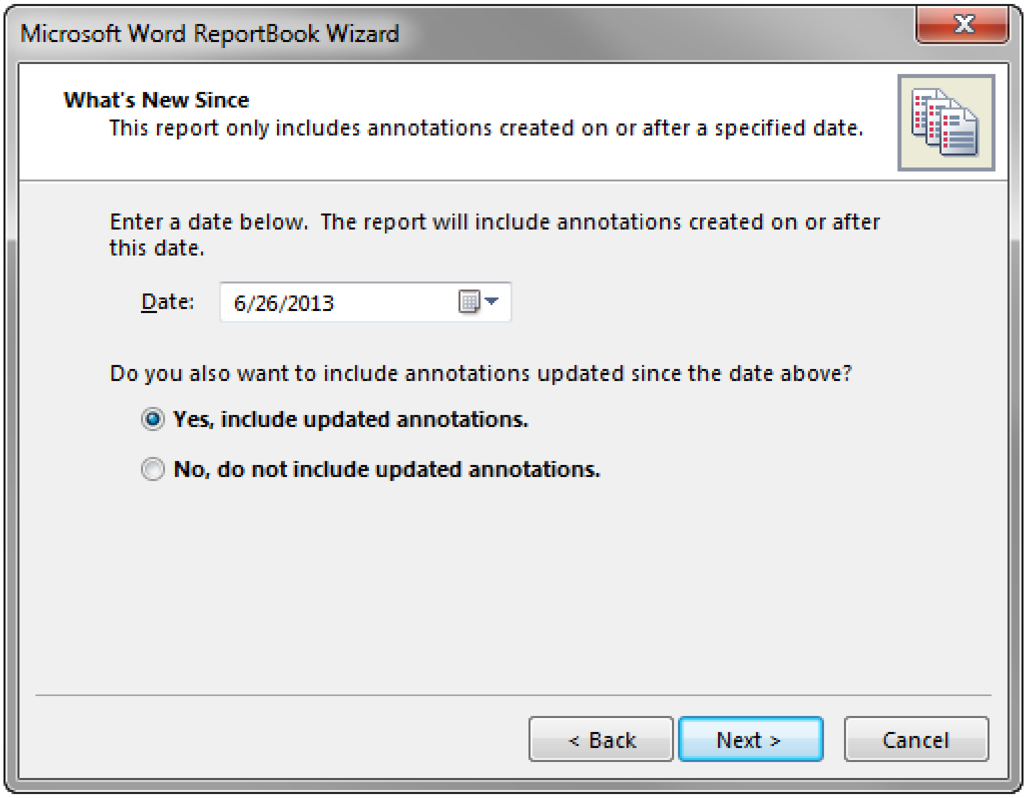
3. On the **Microsoft Word ReportBook Wizard's Welcome** page, click **Next**.

4. On the **Select Report Type** page, verify that **What's New** is selected, then click **Next**.

5. On the **Select Transcripts** page, review the transcripts you want to include in the report.

   Click Modify to change the order of the transcripts in the Select Transcripts dialog box or add more transcripts to the report.

6. On the **What's New Since** page, type in a date for the report in the **Date** field.



7. Under **Do you also want to include annotations updated since the date above?**, select one of the following:

   - Yes, include updated annotations.
   - No, do not include updated annotations.

8. Click **Next**.

9. On the **Group Annotations by Issue** page, select whether to group annotations by issue or to sort by page and line number, then click **Next**.

The Group Annotations by Issue is the default option and will group annotations on the report by their linked issues. This may result in an annotation being on the report multiple times. If you do not want to group annotations by issue select No, only sort by page and line number.

1. On the **Annotations Sections** page, select or clear the sections you want in the report, then click **Next**.

11. On the **Include Redactions** page, choose one of the following:

    - Yes
    - No

    See Changing page setup options for details on applying the redaction color and reasons.

12. On the **Limit Annotations by Issue** page, choose one of the following:

- **Yes, include all annotations.**
- **No, only include annotations linked to the selected issues.**

  In the Select issues to include box, select the check box next to each issue you want to include.

13. Click **Next**.

14. On the **Linked CaseMap Facts** page, choose one of the following:

    - **Yes, include linked facts.**
    - **No, do not include linked facts.**

    To include facts from CaseMap, you must first have the corresponding case open in CaseMap.

15. Click **Next**.

16. On the **Completing the Microsoft Word ReportBook Wizard** page, click **Finish** to generate the report.

17. Preview the report in Word.

18. On the **File** menu, click **Save As** to name and save the report.

Related Topics

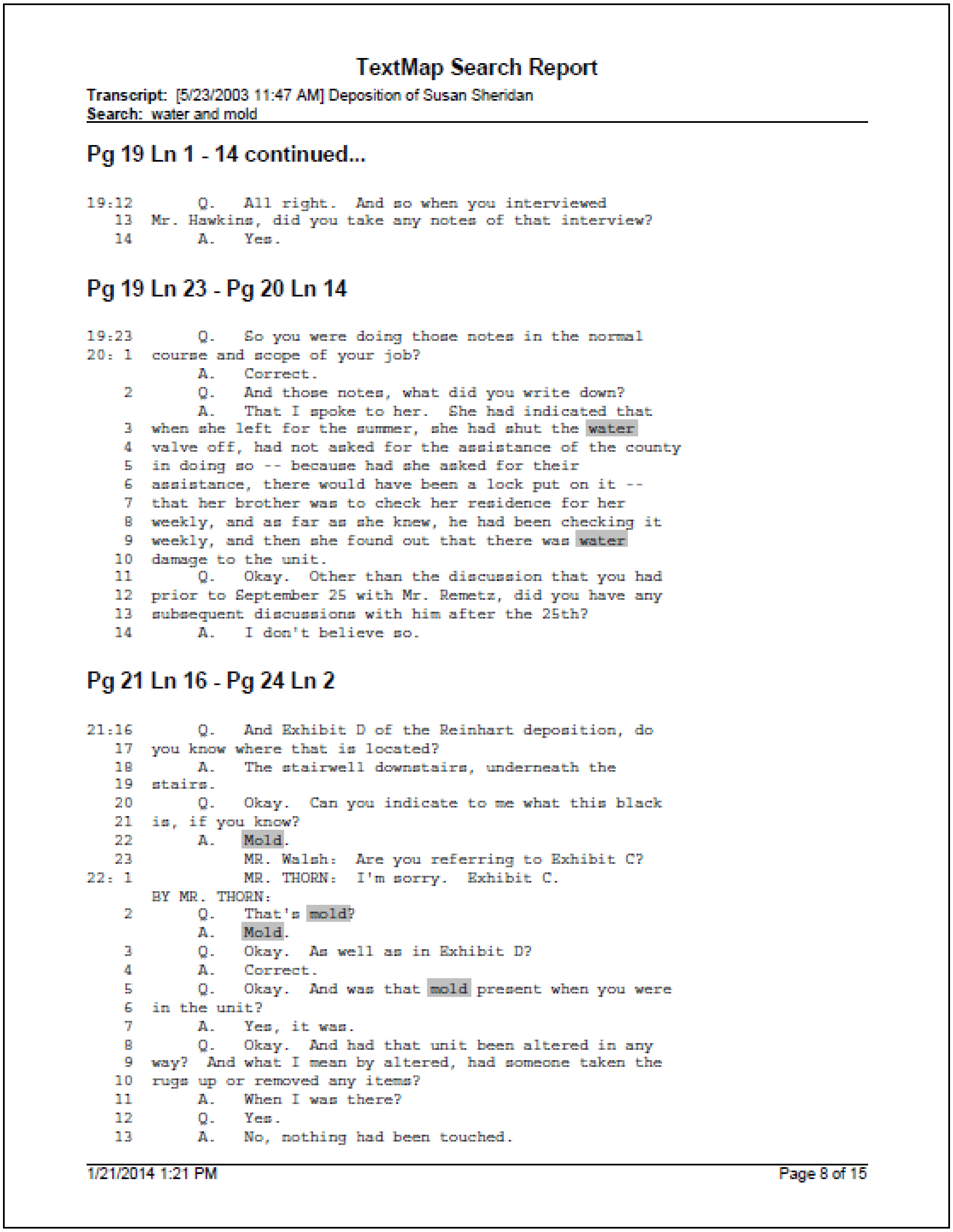
About reports
Selecting print output options
Printing Annotation Digests

Printing a Search report

Search reports can be created after a full-text search is run. The Search report is organized by transcript and contains search results from transcripts and/or linked exhibits that include search terms in your query. The search query run before generating the report prints at the top left of each report page in addition to the transcript name and date, and page/line number.

Search terms are highlighted in gray so you can easily locate them. You can adjust the number of lines that print before and after each transcript text or exhibit hit included in the report. Additionally, you can choose whether to include Q & A pairs in the report.

Search reports print in ReportBook format, which include a title page, statement of confidentiality, and table of contents. You can customize the report's title page settings.



TextMap Search Report

Transcript: [5/23/2003 11:47 AM] Deposition of Susan Sheridan
Search: water and mold

Pg 19 Ln 1 - 14 continued...

Q. All right. And so when you interviewed Mr. Hawkins, did you take any notes of that interview?
A. Yes.

Pg 19 Ln 23 - Pg 20 Ln 14

Q. So you were doing those notes in the normal course and scope of your job?
A. Correct.
Q. And those notes, what did you write down?
A. That I spoke to her. She had indicated that when she left for the summer, she had shut the water valve off, had not asked for the assistance of the county in doing so -- because had she asked for their assistance, there would have been a lock put on it -- that her brother was to check her residence for her weekly, and as far as she knew, he had been checking it weekly, and then she found out that there was water damage to the unit.
Q. Okay. Other than the discussion that you had prior to September 25 with Mr. Remetz, did you have any subsequent discussions with him after the 25th?
A. I don't believe so.

Pg 21 Ln 16 - Pg 24 Ln 2

Q. And Exhibit D of the Reinhart deposition, do you know where that is located?
A. The stairwell downstairs, underneath the stairs.
Q. Okay. Can you indicate to me what this black is, if you know?
A. Mold.
MR. Walsh: Are you referring to Exhibit C?
MR. THORN: I'm sorry. Exhibit C.
BY MR. THORN:
Q. That's mold?
A. Mold.
Q. Okay. As well as in Exhibit D?
A. Correct.
Q. Okay. And was that mold present when you were in the unit?
A. Yes, it was.
Q. Okay. And had that unit been altered in any way? And what I mean by altered, had someone taken the rugs up or removed any items?
A. When I was there?
Q. Yes.
A. No, nothing had been touched.

1/21/2014 1:21 PM Page 8 of 15

To print a search report

1. In the **Search** pane, on the **Full Text Search** tab, run a search if you have not already done so.

See [Running full-text searches].

2. On the **Reports** ribbon, click **Search Report**.

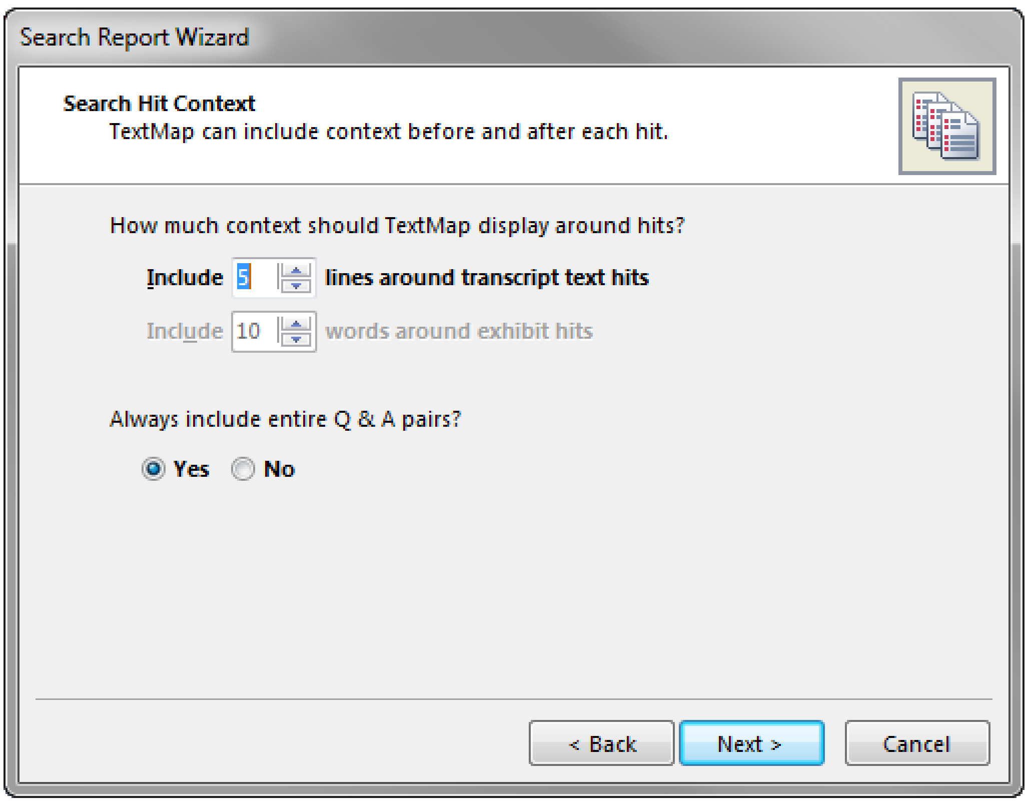
   You can also click the Search Report on the Search ribbon.

3. On the **Search Report Wizard's Welcome** page, click **Next**.

4. On the **Optional Features** page, select or clear the ReportBook options you want to include, or highlight an option in the list and click the edit button to make applicable changes.

   See [Modifying ReportBook title pages].

5. On the **Search Hit Context** page, accept the default number of lines around the transcript and exhibit text hits, or use the up/down arrows to adjust the number of lines.



   The default number of lines around transcript text hits is 5.

   The default number of words around exhibits hits is 10.

6. Under **Always include entire Q & A pairs?**, select **Yes** or **No**.

7. Click **Next** to continue.

8. On the **Completing the Search Report Wizard** page, click **Finish**.

9. In the **Print** dialog box, select your print options, then click **OK**.

   The print options will change depending on your selection. See [Selecting print output] options.

We recommend you select Preview first to verify your report before printing a hard copy or saving the report as a PDF file. You can select your print options from the Print Preview toolbar.

Related Topics

About searching
Running full-text searches
About reports
Modifying ReportBook title pages

Printing the Transcript Listing

Any time you need a listing that shows all the transcripts within your case, you can use the Transcripts Listing report. This report helps you to track your transcripts. The Transcripts Listing includes the case name, the date that the report was produced, and the names of each transcript currently in the TextMap case. You can print directly to a printer or to a PDF file.

TextMap Transcript Listing

Case Name: Phillip Hawkins v. Anstar Biotech Industries
Produced On: 5/3/2013 3:45 PM
Page: 1 of 1

Transcript Name	Transcript ID
Deposition of Philip Hawkins	1
Deposition of Susan Sheridan	45
Deposition of Wayne Varvaro	46
Interview Notes	4

Some organizations choose to add the date to the file name and run the report every week so that they have a historical accounting of the Transcripts Listing.

To print a Transcript Listing

1. On the **Reports** ribbon, click **Transcripts Listing**.
2. In the **Print** dialog box, select your print options.
3. In the **Destination** area, select **Printer**, **Preview**, or **PDF**.

   The print options will change depending on your selection. See Selecting print output options.

   We recommend you select Preview first to verify your report before printing a hard copy or saving the report as a PDF file. You can select your print options from the Print Preview toolbar.

4. In the **Printer** area, review and adjust your printer options, which depend on you print destination.
5. In the **Page Range** area, select the pages you want to print.
6. In the **Copies** area, type in the number of copies you want and whether to collate.
7. Click **OK** to print the report.

Related Topics

About reports
Changing page setup options

Printing the case index

The transcript word index is a listing of all words in a transcript. Single transcript and multiple transcript reports both offer case index reports. The Case Index report includes a cover sheet for the transcript(s). You have the option to include a title page, statement of confidentiality, and introduction. You also have the option to have TextMap exclude the redacted words in the transcript when printing the case index reports.

The font size and column settings can be customized in the Page Setup dialog box. See Changing page setup options.

Transcript Word Index

[& - arndt]

&

& 2:5,11 25:12 26:15 30:1

1

10:00 1:18
10:45 36:5
106-55-6571 5:5
10th 19:23
11 35:24
12 18:4
12/10/00 1:9
12/10/99 39:4
13 8:8
13th 4:17 16:4
1400 32:4
14th 16:5,8 17:1,4 37:7 38:15
1500 32:4
15th 28:13,20 32:10
16th 30:5
17 35:24
18th 17:3,5,8,13 19:3,3,4 30:25
1959 4:17
1976 6:24 7:13
1980 5:25
1984 6:25 7:13,24
1985 6:17
1988 5:12 9:20 10:2
19th 19:5,8
1st 9:20 27:11,15 28:13,16,20 30:4,25

2

2/29 28:10
2000 1:18 13:7 31:11,15 37:8 38:15 39:20
20th 17:16 19:7,20
21 1:18
21st 23:13
22 7:11
22nd 25:7
23rd 25:7
24th 23:11,14
25 12:14
263-55-6571 1:5 39:4
2646 4:21
29th 26:1,5 34:22

3

30 8:21 12:14
32202 2:6 39:25
32207 2:12
32980 4:22
35 13:11
353-7706 39:25
36,000 29:9

4

4 3:6
40 4:18
400 32:7
45 13:11
460 32:9
4700 2:11
4741 1:19

5

5:00 30:18

6

606 39:24
66 31:7

7

75 11:10 12:5
7th 6:17

8

8:00 30:17
800 20:2
81 6:1
82 6:1
84 7:4

9

904 39:25
99 13:7

a

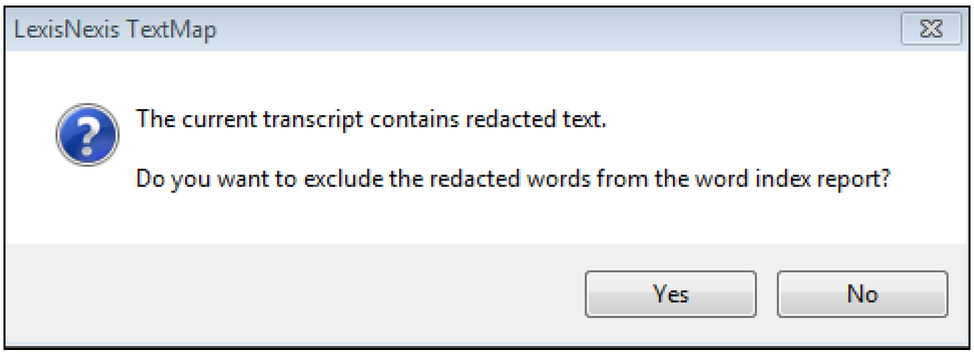
a.d. 38:15 39:20
a.m. 1:18 36:5
abi 1:7
able 14:18 17:15 21:18
academic 8:6
academy 5:21,23 6:2,17 8:2,8
accident 8:25 10:10,13,14 13:19 18:25 25:22 28:4 29:2,7,21 30:12,14 34:5,8,11
accidents 34:10
accredited 6:7
action 38:13,14
actively 27:21
activities 20:10
additional 31:9
address 4:20,23
administering 11:14
affirmatively 26:3
affixed 39:16
agreed 4:2
alachua 33:9
ambulance 11:24 15:16
amended 1:17
amount 5:21 31:20
angle 12:16
ankle 15:3,4
annually 31:21
answered 30:4
answering 30:22
apartment 4:25
apparently 25:2
appeared 37:5
apprehend 9:24
approximate 23:11
approximately 4:24 6:22 7:13 8:19 14:7 16:2 25:6,25 26:18 31:16
april 27:11,15 31:17
arndt 2:4,5,5 13:13 25:12,12,14 26:22 33:6 36:2

Deposition of Philip Hawkins

If you print the transcript with a case index to a PDF file, each word's page and line reference in the index is a hyperlink to the page in the transcript where the word appears. TextMap also creates bookmarks in the PDF for the contents of the report or ReportBook and for the entire case index.

To print an index for a single transcript

1. In the **Transcripts** pane, click on the transcript for which you want to print an index.
2. On the **Reports** ribbon, under **Current Transcript Report**, click **Word Index**.
3. Click **Yes** or **No** to exclude or include redacted text in the current transcript.



4. In the **Print** dialog box, select your print options, then click **OK**.

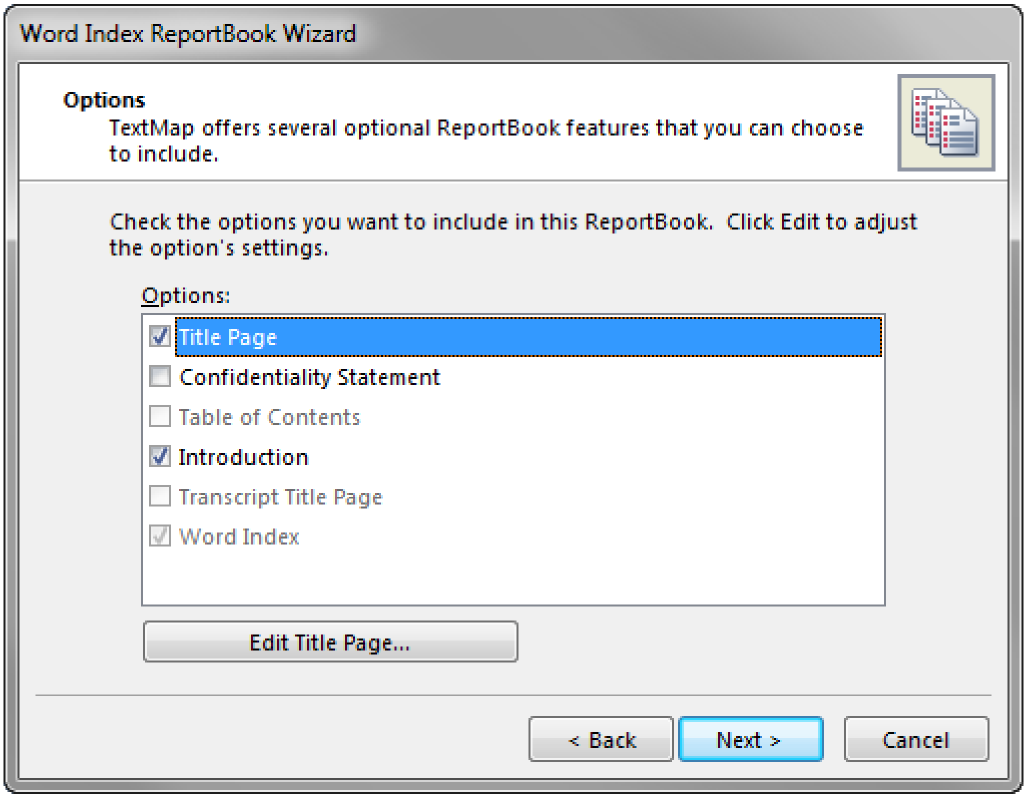
   The print options will change depending on your selection. See Selecting print output options.

We recommend you select Preview first to verify your report before printing a hard copy or saving the report as a PDF file. You can select your print options from the Print Preview toolbar.

To print a word index ReportBook

1. On the **Reports** ribbon, in the **Multiple Transcripts Report** area, click **Word Index**.
2. On the **Word Index ReportBook Wizard's Welcome** page, click **Next**.
3. On the **Select Transcripts** page, review the transcripts you want to include in the report.

   Click Modify to change the order of the transcripts in the Select Transcripts dialog box or add more transcripts to the report.
4. On the **Select Transcripts** page, click **Next**.
5. On the **Options** page, select or clear the ReportBook options you want to include.



See Modifying ReportBook title pages.

7. On the **Options** page, click **Next**.

11. On the **Include Redactions** page, choose one of the following:

- Yes, to exclude redacted words.
- No, to include redacted words.

8. On the **Completing the Word Index ReportBook Wizard** page, click **Finish** to generate the report.

9. In the **Print** dialog box, under **Destination**, click the print output you want.

   The print options will change depending on your selection. See Selecting print output options.

We recommend you select Preview first to verify your report before printing a hard copy or saving the report as a PDF file. You can select your print options from the Print Preview toolbar.

8. Select additional print options, then click **OK**.

Related Topics

[About reports](#)
[Selecting print output options](#)
[Understanding layout options](#)
[Printing single transcripts](#)
[Printing multiple transcripts](#)
[Printing Annotation Digests](#)

Exporting Data

About exporting

TextMap allows you to extract case data to save in a variety of file formats, export directly to another application like AccessData® Summation®, or into a companion product like TextMap App for iPad®, CaseMap®, or Sanction®. In order to view the exported data, you must have a license of the native application installed on your computer.

Export data to the following programs and formats:

- TextMap portable case format
- TextMap portable transcript format
- TextMap App for Apple® iPad®
- LexisNexis CaseMap and Sanction
- Amicus® Attorney
- AccessData® Summation®
- Text file (including comma or tab delimited)

Review file format options

Reference the following table to understand the file format options that you can export TextMap data into.

Export File Format Options	
File Format	**Description**
TextMap	Portable Transcript Format (*.ptf) is a file format for a single transcripts. Portable Case Format (*.pcf) is a file format for a single transcript or multiple transcripts. TextMap Portable Transcript Format (*.xmptf) a file format for a single transcript or multiple transcripts.

Export File Format Options	
File Format	**Description**
	TextMap export files contain the transcript text and all annotations. TextMap also creates a *.vid file with associated video synchronization information to go along with these files. See Exporting videos.
TextMap App for iPad	*.xmme is a file format for transcripts and annotations that can be imported into the TextMap App for iPad.
CaseMap	Using the Send to CaseMap tool, transcript text can be imported into a CaseMap case as a new fact record in the Facts spreadsheet.
Sanction	*mdb is a file format for a single transcript that can be imported into LexisNexis Sanction®.
Amicus, Summation and Page Image Format	Text files are formatted for single transcript that contains all text. Amicus *txt is a format that can be imported into Amicus® Attorney. Summation *.txt is a format that can be imported into Summation®.

Related Topics

- Exporting transcripts
- Exporting annotations
- Exporting data to an iPad
- Exporting videos
- Sending facts to CaseMap
- Exporting a Sanction clip list

Exporting transcripts

TextMap offers several options for exporting transcripts, depending on how needs. If you want to export one or more case transcripts at a time, you need to export using the portable case format (*.pcf) option. When you export transcripts to a portable case format, you can choose whether to export all transcripts in the case or select individual transcripts.

You can also export a transcript to several other file formats. When choosing from these formats, you can only export one transcript at a time.

Transcripts can also be exported to the following other file formats:

- Portable Transcript Format (.ptf)
- Amicus Format (.txt)
- Page Image Format (.txt)
- Summation Format (.txt)
- Sanction Format (.mdb)
- TextMap Portable Transcript Format (.xmptf)

For information on all export options, see About exporting.

To export a transcript to a select file format

1. In the **Transcripts** pane, select the transcript you want to export.
2. Click **More Export** on the **Home ribbon,** and then click **Export Transcript**.

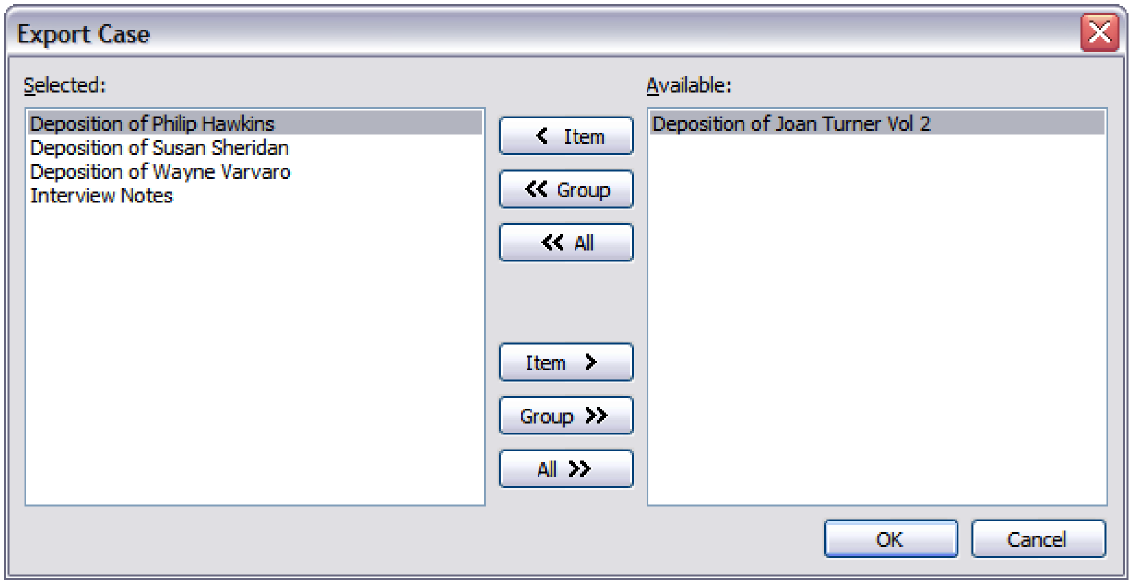
   You can also click on the File menu and the click Export and Export Transcripts.
3. In the **Select Name, Location, and Type for Exported Transcript** dialog box, select the folder where you want to save the file.
4. In the **Save as type** field, select the file format you want, then click **Save**.
5. In the message box to confirm the export, click **OK**.

   The exported transcript is now saved to the selected folder location.

   You can import this transcript into another case, if needed.

To export transcripts to a portable case format

1. On the **File** menu, click **Export** and then click **Export to Portable Case Format**.
2. In the **Select Name, Location, and Type for Exported Transcript** dialog box, select the folder where you want to save the file, then click **Save**.
3. In the **Export Case** dialog box, select transcripts in the **Selected** box that you do not want to include in the export and click the **Item >** button to move them into the **Available** box.



Press the CTRL key and hold it while selecting individual, multiple transcripts.

Press SHIFT and hold the keys while selecting a consecutive set of transcripts.

4. Click **OK** to continue.
5. In the message box to confirm the export process, click **OK**.

   The exported case with selected transcripts is now saved to the selected folder location.

   This file can be imported into a TextMap case, if needed.

Related Topics

[About exporting](#)
[Exporting annotations](#)
[Exporting data to an iPad](#)

Exporting annotations

Using the Export Annotations Wizard, you can export annotations from one or more transcripts to a .csv file that can be viewed in Microsoft® Excel. Using the wizard, you can:

- Select the transcripts from which you want to export annotations
- Limit the annotations included by issue
- Choose the storage location/output file

To export annotations to a .CSV file

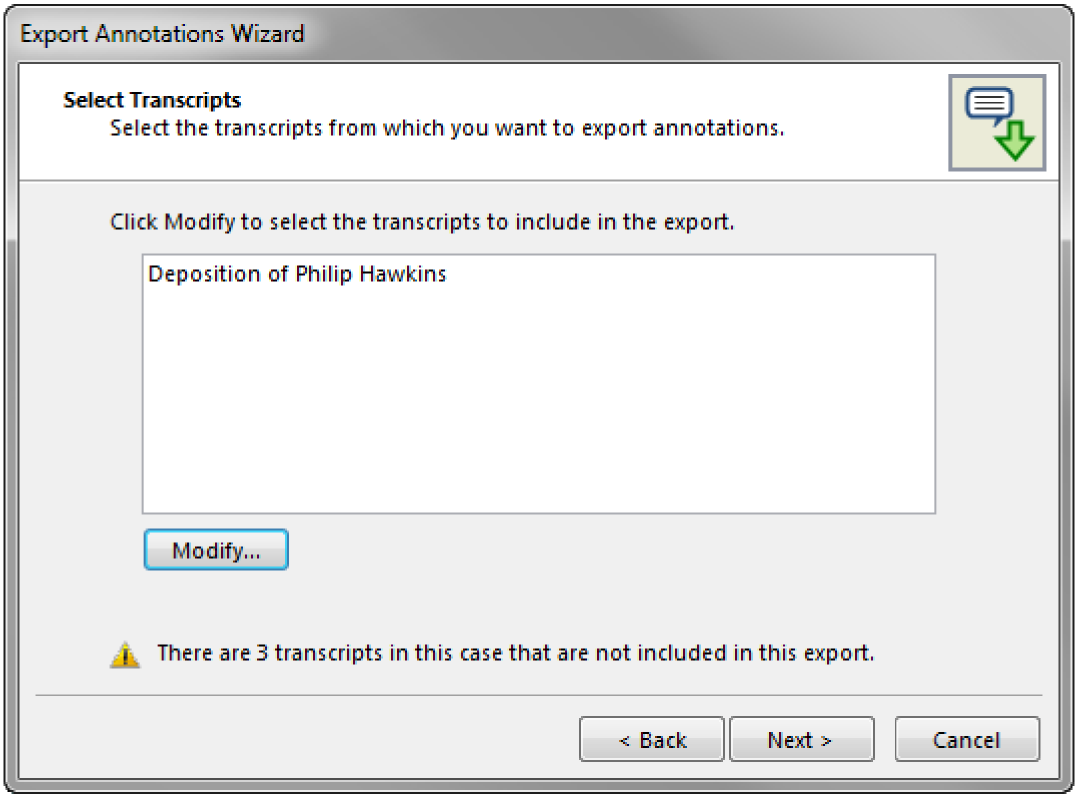
1. In the **Transcripts** pane, select a transcript, and then select the annotation you want to export.

2. Click **More Export** on the **Home ribbon,** and then click **Export Annotations**.

   On the File menu, you can also click Export, and then click Export Annotations.

3. In the **Export Annotations Wizard**, click **Next**.

4. On the **Select Transcripts** page, select the transcripts that have annotations you want to export.



   The transcript now displays in the Transcript pane now displays in the export wizard.

   The default transcript is the current, active transcript.

4. Optional: To modify the transcript list:

   a) Click the **Modify** button to add more transcripts to the export.

      The Select Transcripts dialog box opens.

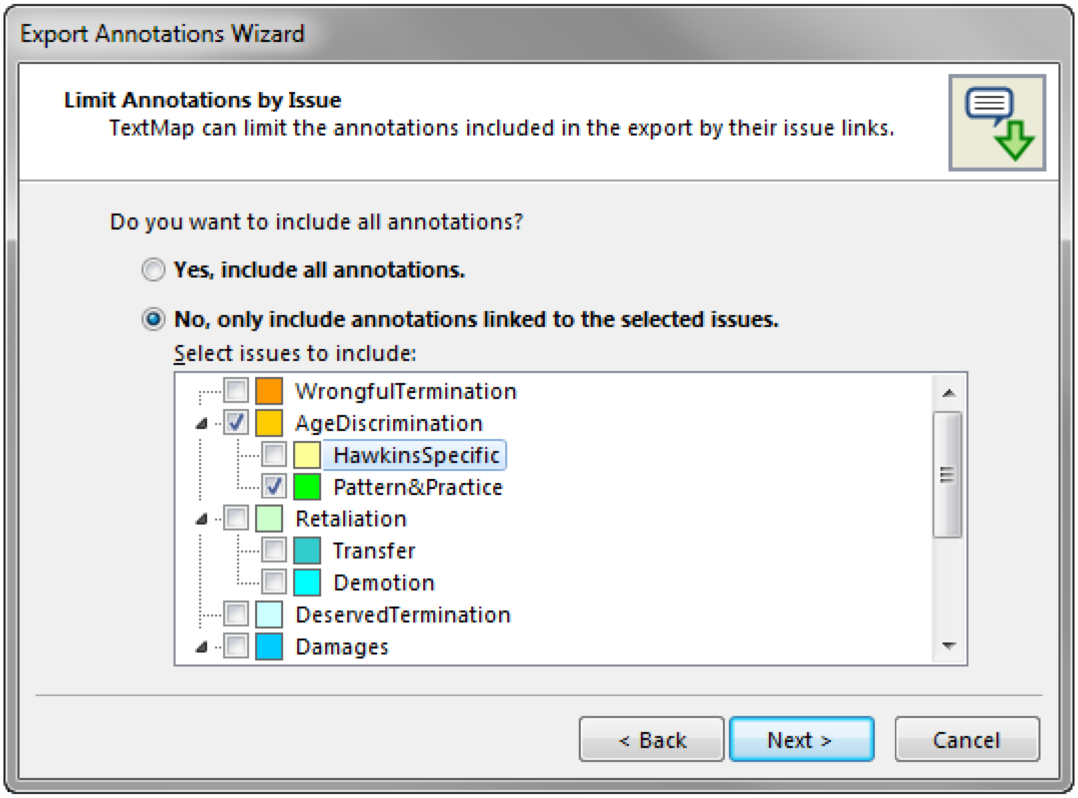
   b) In the **Available Transcripts** box, select the check box beside the transcript you want to add.

      When an item is selected, it is added to the Selected Transcripts area of the **Select Transcripts** dialog box.

c) Optional: Click the **Select All** check box to add all transcripts in the **Available** box.

d) Click **OK** to close the dialog box.

5. Click **Next** to display the Limit Annotation by Issue dialog box.



6. On the **Limit Annotations by Issue** page, select one of the following:

To include all annotations

a. Select the **Yes, include all annotations** check box to export all annotations.

b. Click **Next**.

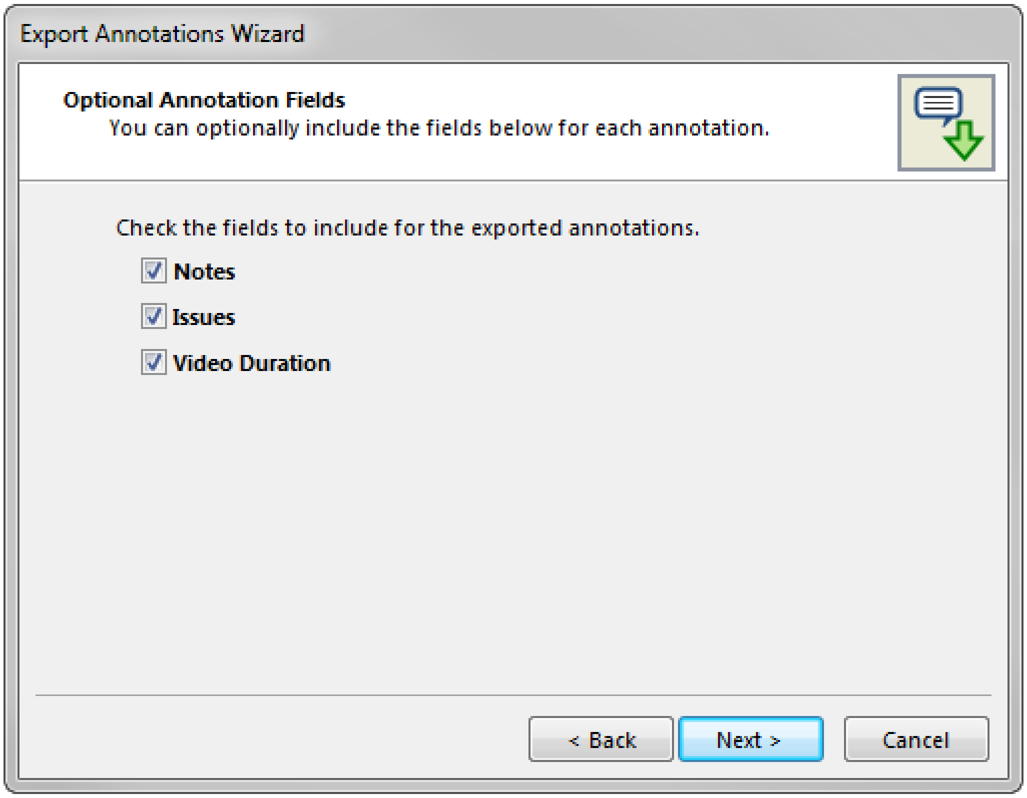
To include only annotations linked to issues

a. Select the **No, only include annotations linked to the selected issues** check box to include only the annotations that are linked to the issues that are selected here.

b. In the **Select issues to include** area, select the check box(es) for all annotations to be included in the export.

c. Click **Next**.

7. In the **Optional Annotations Fields** dialog box, select the field(s) to be included with the exported annotations:



Notes -- Include a field to list the note(s) associated with each annotation.

Issues -- Include a field to list the issue(s) associated with each annotation.

Video Duration -- Include a field to list the length of the video clip.

8. Click **Next** to continue.

   The Output File dialog box opens.

9. Click the **Browse** button to choose a file name and storage location.

10. In the **Export Annotations** dialog box, navigate to the folder where you want to save the .CSV file.

    This folder defaults to the export folder selected in the File Locations tab in the Tools > Options dialog box.

12. In the **File Name** field, type in a name for the .CSV file, and then click **Save**.

13. On the **Output File** page, click **Next** to initiate the export.

    The Completing the Export Annotations Wizard displays the number of annotations exported.

14. Optional: Click the hyperlink to view the output file.

    The exported annotations can be viewed in Microsoft Excel. Transcripts display in alphabetical order.

	A	B	C	D	E	F	G	H	I
1	Transcript	PgFrom	LnFrom	PgTo	LnTo	Notes	Issues	VideoDuration	
2	Depositio	17	18	17	23		Pattern&Practic	0:00:00	
3	Depositio	5	13	5	18	Varvaro expla	Pattern&Practic	0:00:25	

15. Optional: To calculate video clip duration, perform the following:

    Calculating the total video duration is very beneficial when it comes to determining if you are within the allotted time when making presentations.

    a. In the **Completing the Export Annotations Wizard** dialog box, click the **Click here to open the output file** hyperlink.

       The output file opens in Microsoft® Excel®.

    b. In the Excel spreadsheet, place the cursor below the last entry in the **Video Duration** column and click the **Auto Sum** button.

       The total duration time is displayed.

    c. Save and close the Excel spreadsheet.

16. Click the **Finish** button to close the wizard.

Related Topics

About exporting
Exporting transcripts
Exporting data to an iPad

Exporting data to an iPad

The Export to iPad Wizard allows you to export case issues, one or more selected transcripts, annotations, and linked exhibits to the iPad. You have the option to email case data to an iPad or save it to a file so you can send it later. Refer to the iPad Export Considerations table for details about exporting transcripts, case issues, linked files, and exhibits.

To view data export considerations

Reference the following table for considerations when exporting case data to your iPad.

iPad Export Considerations	
General	You can export the same transcripts to your iPad more than once.

iPad Export Considerations	
Case Issues	The entire case issues outline is sent to the iPad during the export.
Annotation Linked Files	Files linked to annotations are not exported to the iPad.
Exhibits	TextMap will not export exhibits that it cannot make a copy of, including links to a document management database.
	Only exhibits linked to selected transcripts are included in the export.

To export case data to an iPad

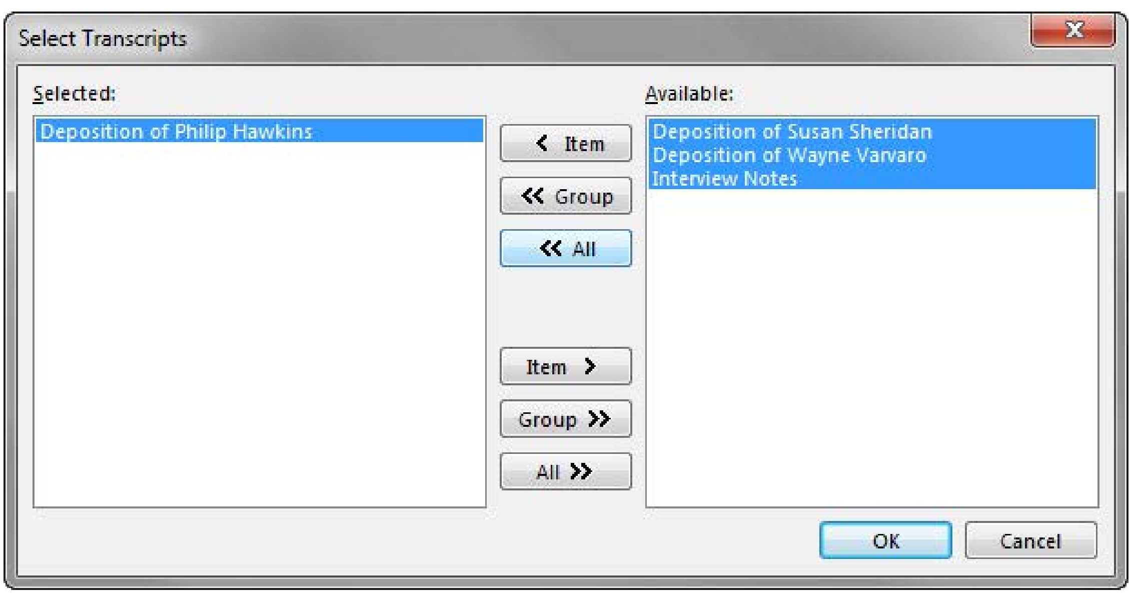
1. Open the case that contains the case data you want to export.
2. On the **Home Ribbon**, click the **Export to iPad** button.

   On the File menu, you can also click Export, and then click Export to iPad .
3. On the **Export to iPad** wizard's **Welcome** page, click **Next**.
4. On the **Select Transcripts** page, select the transcript(s) you want to include in the export.

The Include exhibits check box is selected by default to export all exhibits linked to these transcripts. If you want to exclude all exhibits from the export, clear the check box.

5. Click the **Modify** button to add additional transcripts to the export.

6. In the **Select Transcripts** dialog box, in the **Available** box, select the transcripts or files you want to include and then click the **< Item** button.



To include all files, click the << All button.

To include all of the transcripts from a group, select the transcript group and then click the << Group button.

The transcripts now display in the Selected box.

7. Click **OK** to close the dialog box.

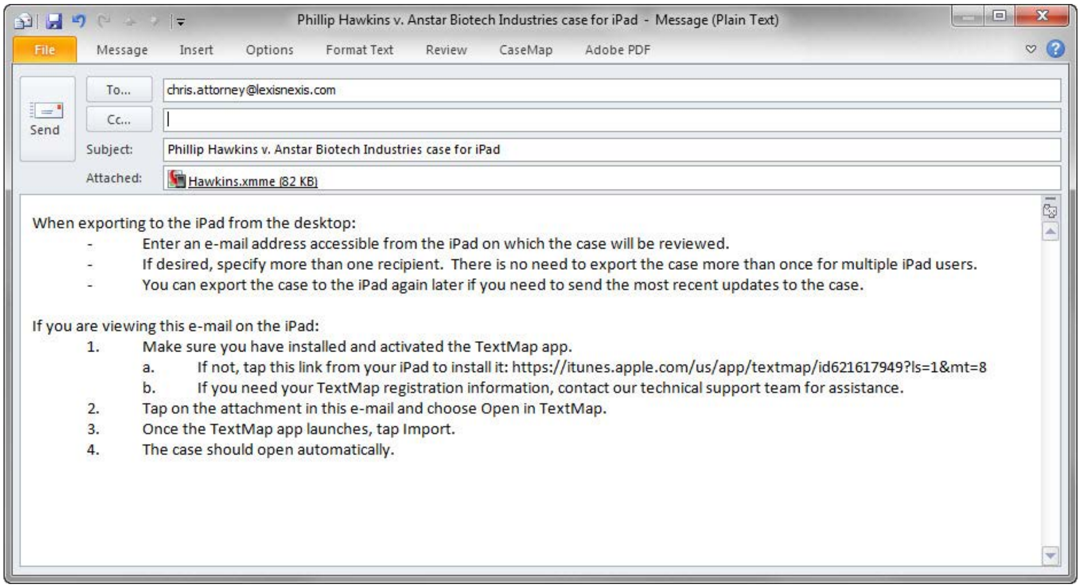
8. On the **Select Transcripts** page, click **Next**.

9. On the **Ready to Send** page, select whether to email the file now or to save it to a folder to send later.

Yes, I want to email the exported file to the iPad now

A Microsoft Outlook email displays on-screen with the exported file automatically attached.

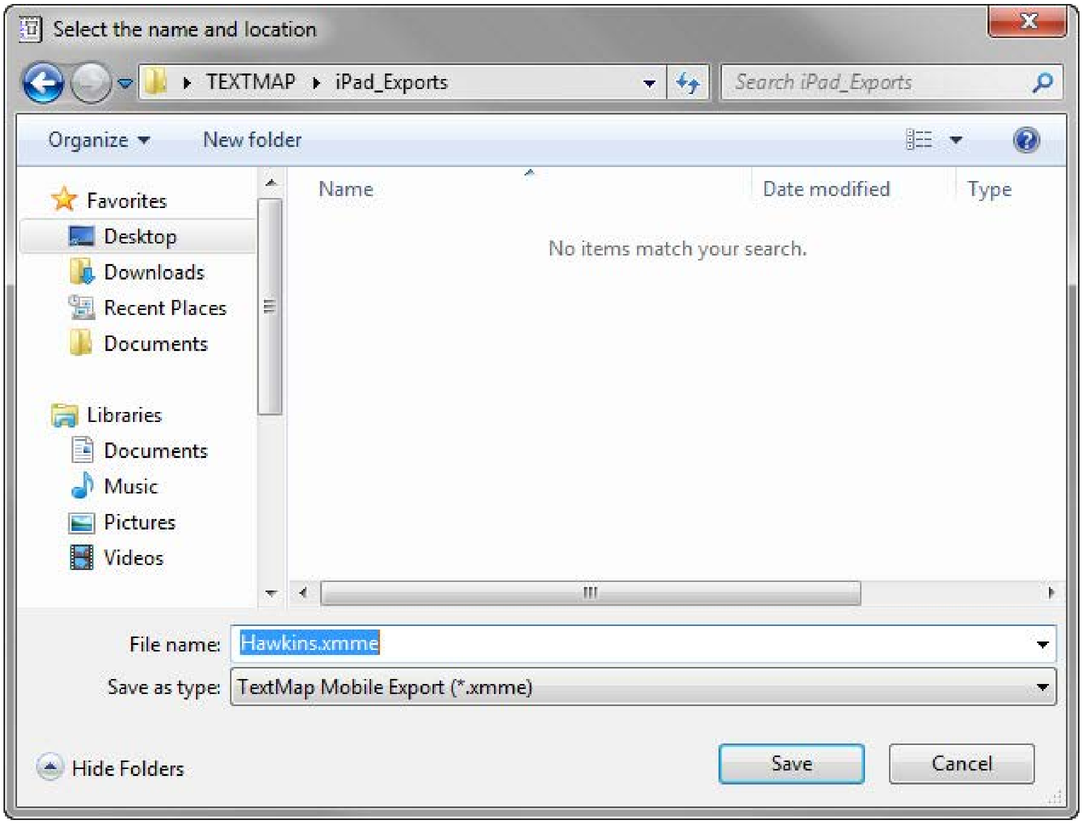
You can now type in one or more email addresses to send the case to the appropriate staff members.



Notice that the email includes pre-written content identifying that the attachment is for the TextMap iPad app. The message includes directions for how to import the file using the Mail app on your iPad. You must have the TextMap iPad app installed in order to import the case.

No, I want to save the exported file to a folder to send later

1. Once this option is selected, click the **Browse** button.
2. In the **Select the name and location** dialog box, navigate to the network folder where you want to store the exported file.



3. In the **File name** box, type in a name for the file.

   The default export file name is the case file name. You can modify the name as needed.

4. Click **Save** to continue.

5. On the **Ready to Send** page, click **Next**.

   The export file is now saved until you are ready to send it to the iPad.

10. On the **Completing the Export to iPad Wizard** page, click **Finish**.

Related Topics

About exporting
About the TextMap iPad app
Importing data from an iPad

Exporting videos

Export video files just as you would export a transcript or other file from your TextMap case.

To learn about files you can export

Reference the following table for a list of the standard formats for exporting transcripts with synchronized video that are supported by TextMap.

Import Video Files Types		
File Types	**File Extensions**	**Description**
LiveNote	*.pcf and *.ptf	Portable Transcript Format (*.ptf) is a file format for a single transcript that can be imported into LiveNote® Stream. Portable Case Format (*.pcf) is a file format for a single transcript or multiple transcripts that can be imported into LiveNote®. Both *.ptf and *.pcf files contain the text and all annotations. TextMap creates a *.vid file with associated video synchronization information to go along with the *.ptf and *.pcf files.
Sanction	*.mdb	*mdb is a file format for a single transcript that can be imported into Sanction®.
Amicus, Summation, and Page Image Format	text or *txt	Text files are formatted for single transcript that contains all text. Amicus *txt is a format that can be imported into Amicus® Attorney. Summation *.txt is a format that can be imported into Summation®.

To export a video

1. In the **Transcripts** pane, right-click the video transcript you want to export and then click **Export Transcript**.

   You can also click More Export on the Home Ribbon, and then click Export to Portable Case Format.

2. In the **Select Name, Location, and Type for Exported Transcript** dialog box, navigate to the folder where you want to save the export file.

3. In the **File** name field, type or edit the name of the export file.

4. In the **Save as type** list, click the file type you want for the export (e.g., Portable Case

Format (*pcf)).

5. Click **Save**.

6. In the Export Case dialog box, if groups have been created, then select an applicable location/group, and then click **OK**.

7. In the message box, click OK to acknowledge the location of the saved file.

Related Topics

[About videos](#)
[Importing video files](#)
[Exporting video clips](#)

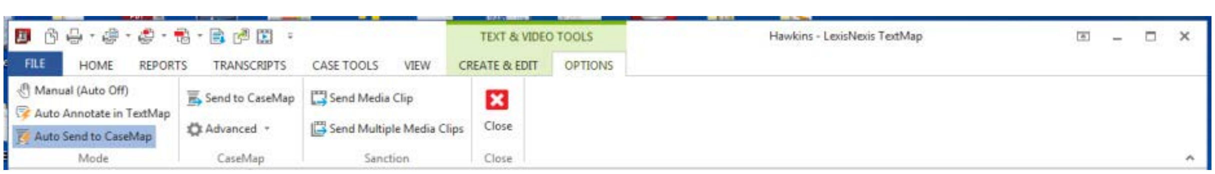
Sending facts to CaseMap

We encourage you to use CaseMap from the first day you begin working on a new matter. When you use CaseMap in conjunction with TextMap, you can enter new facts well in advance of having court-appropriate sources for these fact records. And you can always update the existing fact records while working in TextMap. Later, when you find a source for a given fact as you review a transcript, you can update the pre-existing fact.

TextMap is designed so you can optionally perform all basic data entry about a fact in the midst of sending a transcript passage to CaseMap. These options are available in the dialog boxes that display when you send a new fact to CaseMap or update an existing one. For each transcript passage sent to CaseMap, TextMap automatically creates a source that references the transcript and the page and line numbers of the selection. You must have the related CaseMap case already open in order to send transcript annotations from TextMap to CaseMap.

You can tell which annotations have already been sent to CaseMap by checking the Annotations pane at the top of the page. The Linked Fact column has a Yes/No status indicator for each annotation. Annotations with a Yes have been sent to CaseMap. The CaseMap fact automatically links back to the selected passage in the transcript. If the fact has already been sent a message displays asking if you want to re-send the annotation (it replaces the link to the existing fact).

If you intend to send multiple annotations to CaseMap, consider switching to the Auto Send to CaseMap annotation mode. Click the arrow next to the Annotate in TextMap button or click the Annotations menu, and then click Auto Send to CaseMap. Each time you annotate transcript text the Send to CaseMap dialog box automatically launches, skipping the New Annotation dialog box.



If your organization uses CaseMap, follow those established guidelines for creating short names in CaseMap. If you do not understand the concept of short names, please refer to the CaseMap Answer Center.

Once you have sent annotations to CaseMap, you can use options on the Annotations menu to instantly jump to a selected annotation's associated fact in CaseMap or display a Fact Detail window with information about the associated fact. Right-clicking an annotation in the Annotations pane opens a shortcut menu with the same CaseMap-related options.

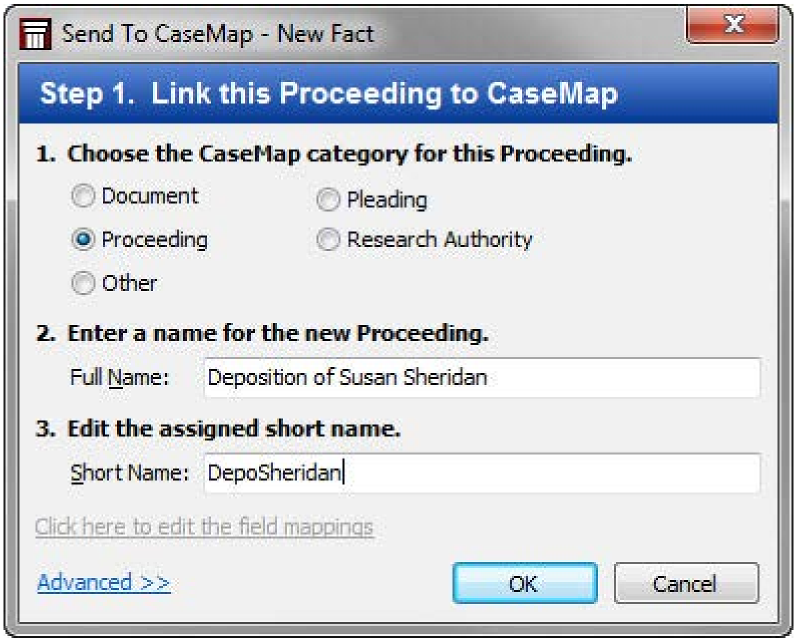
Some organizations install program files on servers, along with the case files. If your organization installs CaseMap and TextMap on a server, these programs must be installed on the same server in order for the links to hold. Additionally, if you move a TextMap case file that contains links to a CaseMap case, you could break the link to the CaseMap record. See Moving cases and Managing/changing file locations topic to plan the case file move beforehand.

To send annotations to CaseMap

1. In **CaseMap**, open the corresponding case.
2. In **TextMap**, select the transcript text you want to send as a new fact to CaseMap.
3. Select/highlight the annotations to be sent to CaseMap, and on the **Text & Video** ribbon, click the **Options** tab.
4. On the **Options** tab, click **Send to CaseMap**.

   You can also right-click on the selected text and click **Send To**, and then click **CaseMap - New Fact**.

   The Send to CaseMap - New Fact dialog box displays.
5. In the **Step 1. Link this Proceeding to CaseMap** dialog box, review the information that is automatically filled in for you, and then click **OK**.

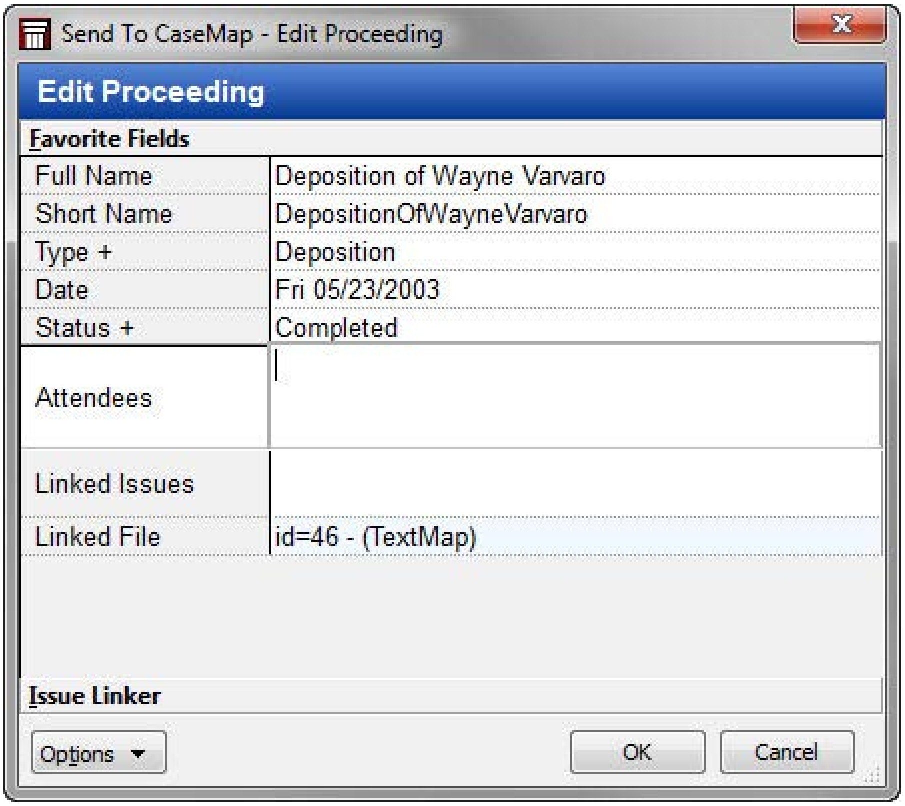


Notice that the transcript content displays in the Text Selection box. Do not delete these brackets as they help link it to the source file. Fact Text is also selected in the Append Text Selection to list and the deposition is listed in the Source(s) field. Any annotation notes display in the Fact Text field.

If you have already sent an annotation from this transcript to CaseMap, the Step 1. Link this Proceeding to CaseMap dialog box does not display.

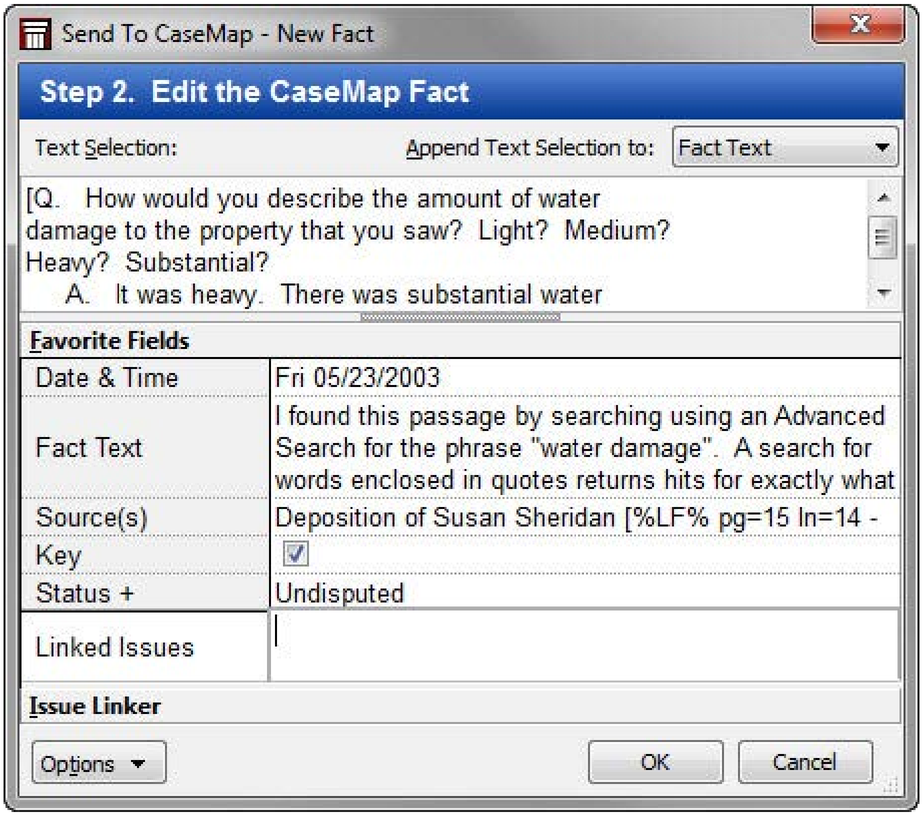
You can also send note text to CaseMap after an annotation is already sent. Notes are added to the Fact Text field as mentioned above. If you add more than one note to an annotation, the annotation and its new note are added to the Facts spreadsheet as a new fact record.

5. Click the **Advanced** link if you also want to add the transcript as an object in CaseMap's All Objects and Proceedings spreadsheets.



Click the Save & Edit button to open the Edit Proceeding dialog box and enter additional information about the new object record, such as the type and status of the document, and any attendees present.

6. In the **Step 2 Edit the CaseMap Fact** dialog box, review the information that is automatically filled in for you.



Notice that the transcript content displays in the Text Selection box. Do not delete these brackets as they help link it to the source file.

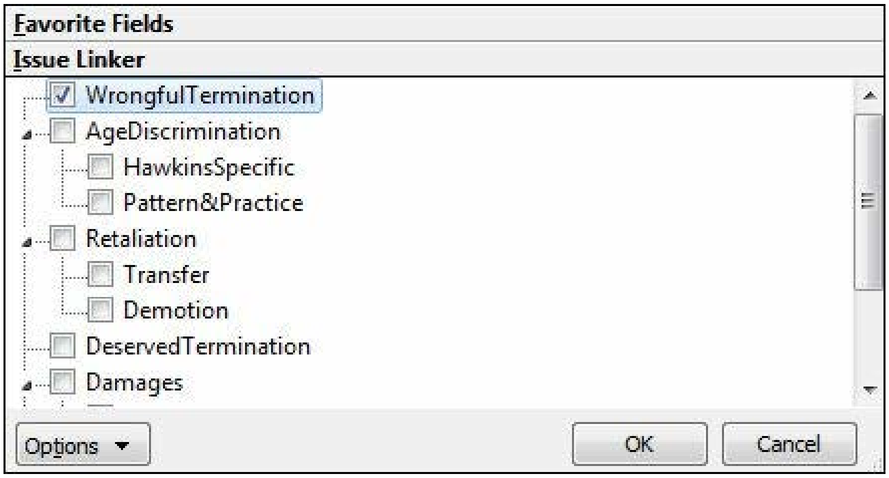
Also notice that the Append Text Select to box automatically lists the Fact Text field. You can select other columns on the spreadsheet to receive the text or click "Do Not Append" if you're entering a summary of the fact and simply want to refer back to the actual text when necessary.

Annotation notes display in the Fact Text box and will display in the Fact Text field in the Facts spreadsheet directly under the annotated text in brackets. You can turn this option off from the Tools menu by clicking Options and then clicking the Annotation tab. Next clear the Use Annotation Note for new Fact Text check box.

The deposition is listed in the Source(s) field.

7. Enter additional information about the new fact record, such as the date and time, whether the information is a key fact, and its current status.

8. Click the **Issue Linker** bar to link to case issues in the CaseMap case.

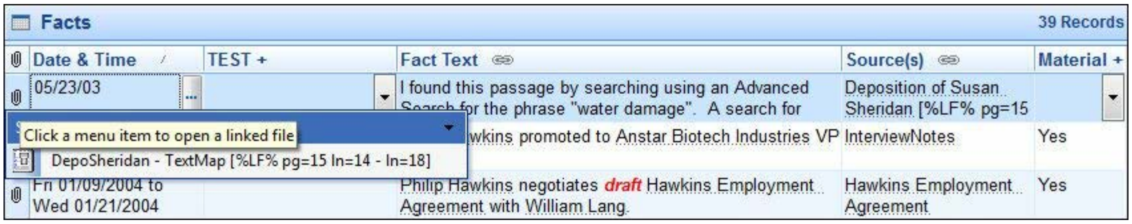


9. Click **OK** to continue.

10. In the message box, click **Yes** to view the new fact record in CaseMap.

11. In **CaseMap**, locate the new, highlighted fact record in the **Facts** spreadsheet.

12. In the **Facts** spreadsheet, click the **Paperclip** icon for the new fact record to view the linked path to the transcript in TextMap.



13. Click the file path to review the TextMap transcript.

    In TextMap, the transcript opens to the page/line number of the annotation.

14. In the **Annotations** pane, notice that the **Linked** Fact column now contains **Yes**, indicating that the excerpt is a linked fact in CaseMap.

To remove an annotation's fact link

You can remove annotation links to fact records in CaseMap. Annotations in the transcript will remain. Deleting the links in TextMap does not delete the fact records in the CaseMap case.

1. Select the annotation(s) in the transcript or in the Annotations pane.

2. Click **Options** on the **Text & Video Tools Options** ribbon, and then click **Advanced.**

3. On the submenu, click **Remove Fact Link**.

4. In the message to remove the CaseMap link, click **Yes**.

Related Topics

[About annotations](#)
[Creating annotations](#)
[Updating existing facts in CaseMap](#)

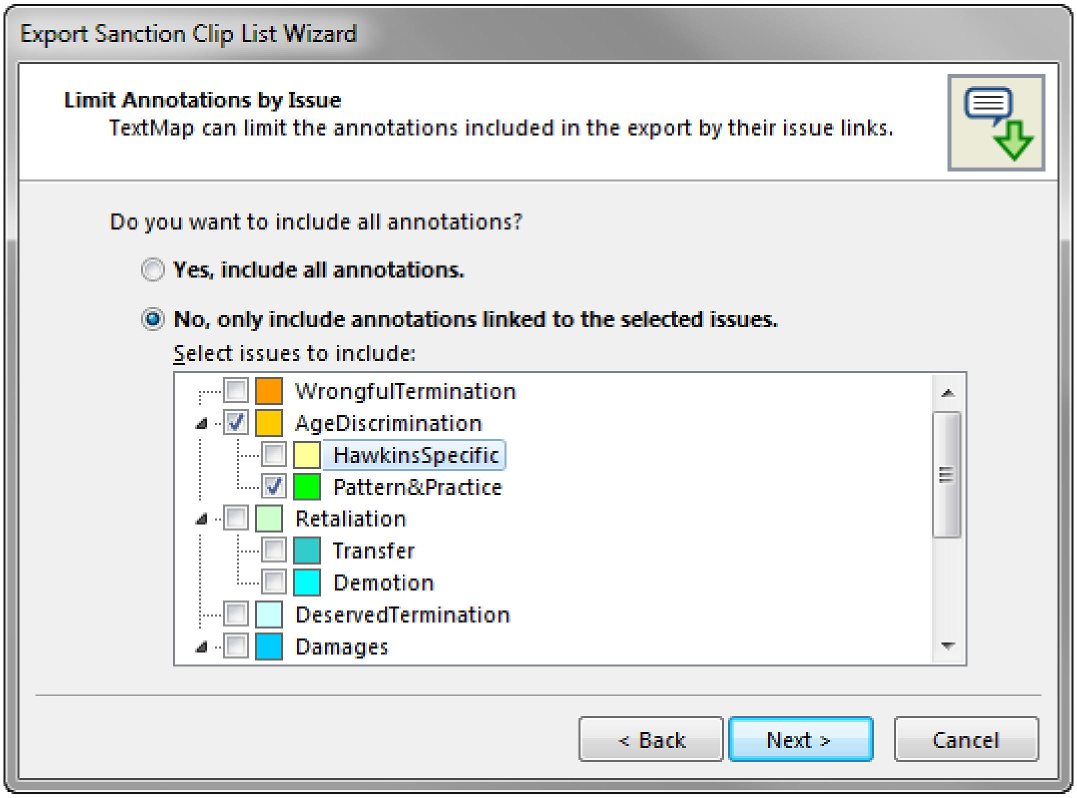
Exporting a Sanction clip list

The Export Sanction Clip List Wizard allows you to export a transcript's annotations by select issues to a Sanction clip list. TextMap skips any annotations that are not linked to a selected issue. Once the text file is exported, you can then import the clip list into Sanction. Annotations display in the text file in page/line order.

To export a Sanction clip list

1. In the **Transcript** pane, select the transcript for which you want to export annotations.
2. Click **More Export** on the **Home Ribbon**, and then click **Export Sanction Clip List**.

   On the File menu, you can click Export, and the Export Sanction Clip List to open the wizard.
3. In the **Export Sanction Clip List Wizard**, click **Next**.
4. On the **Limit Annotations by Issue** page, you can choose to only export annotations to the linked issues you select.



5. Click **Next** to continue.

6. On the **Output File** page, click the **Browse** button.

7. In the **Export Sanction Clip List** dialog box, navigate to the folder where you want to save the file.

   The default file type is a text file.

   This folder defaults to the export folder selected in the File Locations tab in the Tools > Options dialog box.

8. In the **File Name** field, type in a name for the text file, then click **Save**.

9. On the **Output File** page, click **Next** to initiate the export.

10. Click the hyperlink to view the output file.

    The clip list now displays in a text file.

11. Click the **Finish** button to close the wizard.

    You can now import the text file into Sanction.

Related Topics

About exporting

Exporting annotations
Exporting videos

Sending transcripts to Sanction

To assist in organizing presentations of key evidence for trial, you can connect to a case in Sanction® 3.5 and send information from TextMap to Sanction. Please refer to the Sanction Answer Center for additional information.

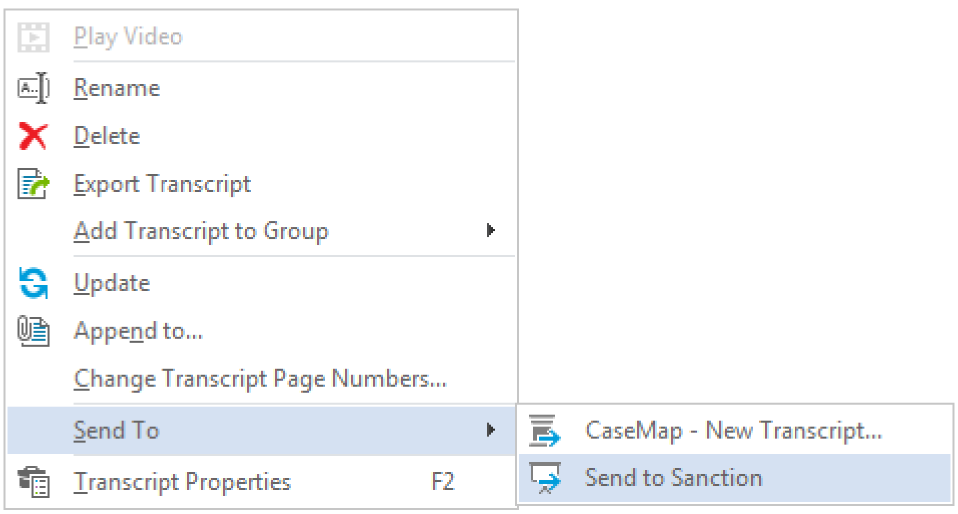
To send a transcript to Sanction

1. Open a case in **Sanction 3.5** or later.

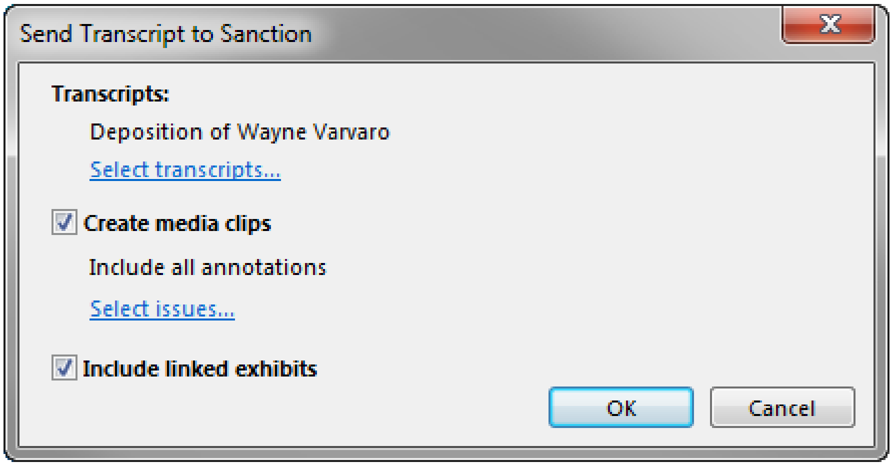
> It is necessary to have a case open in Sanction for the Send Transcript to Sanction option to be successful.

2. In the **Transcript** pane, select/highlight the transcript you want to send to Sanction.
3. On the **Transcript** menu, click the **Send To Sanction** button.

   You can also right-click on a transcript in the list, click Send To, and then click Send to Sanction.



   The Send Transcript to Sanction dialog box opens.

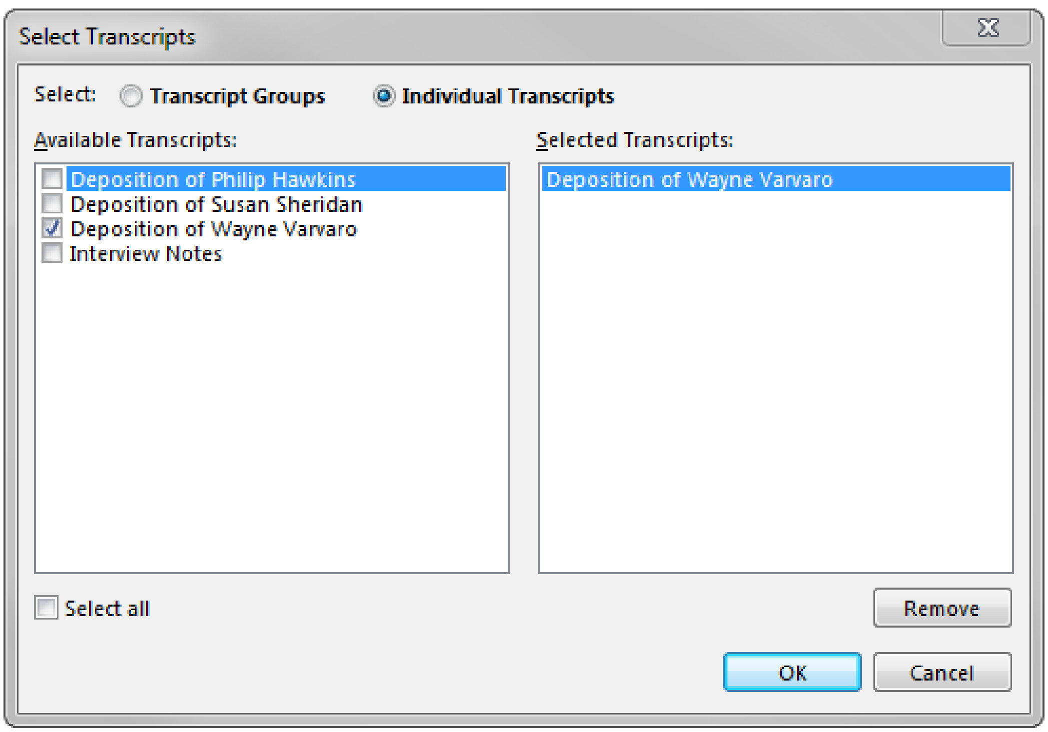


To select multiple transcripts

a. In the **Send Transcript to Sanction** dialog box, click **Select transcripts**.

b. In the **Select Transcripts** dialog box, click **Transcripts Groups** to list transcripts by groups, or click **Individual Transcripts** to list transcripts individually.

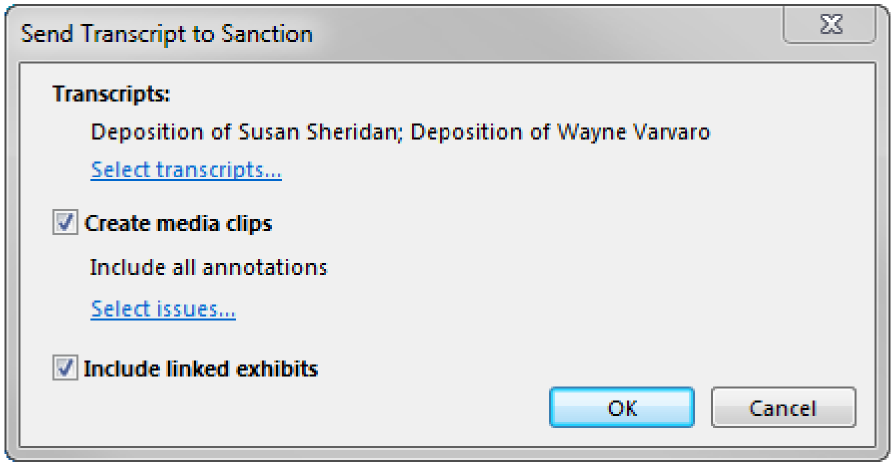
For this example, Individual Transcripts has been selected.



c. In the **Available Transcripts** column, place a check mark beside transcript(s) to be sent to Sanction.

Optional: Place a check mark in the Select all check box to simultaneously select all transcripts.

d. Click **OK** to display the **Send Transcript to Sanction** dialog box.



To include media clips when sending transcripts to Sanction, see Sending annotations as Sanction media clips.

4. In the **Send Transcript to Sanction** dialog box, click **OK.**

Related Topics

About transcripts
About annotations
Sending annotations as Sanction media clips
Editing videos

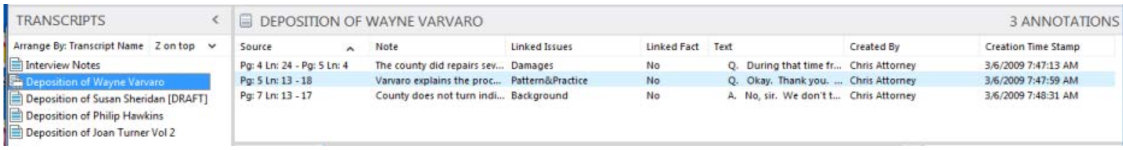
Sending annotations as Sanction media clips

TextMap® allows you to send a single annotation, or bulk send all annotations that contains video to the LexisNexis® Sanction® application as media clips.

To send an annotation to Sanction as a media clip

1. Open a case in **Sanction® 3.5** or later.
2. In the **Transcripts** pane, select a transcript from the list that has both annotations and video.

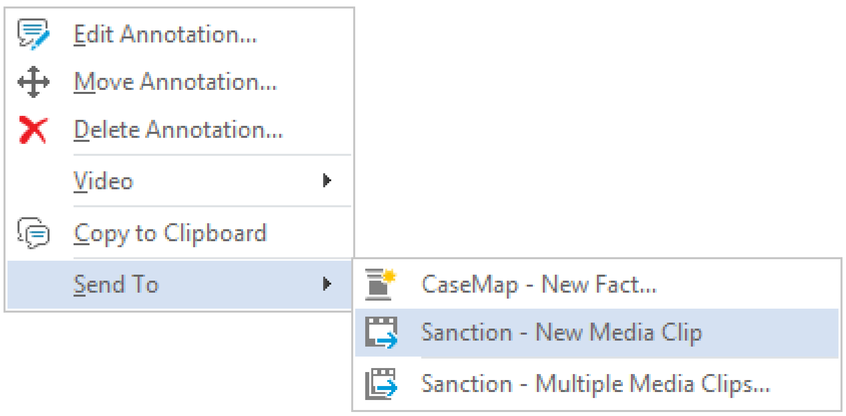
The video icon indicates a transcript with video.



3. Click on the annotation to be sent to Sanction.

4. On the **Create & Edit** tab of the **Text & Video Tools** ribbon, click **More**, and then click **Send Media Clip to Sanction**.

   You can also right-click on the annotation to be sent, select Send To, and then click Sanction - New Media Clip.



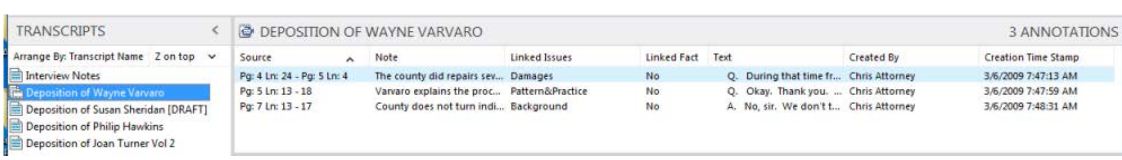
If adjustments have been made to the start and stop times of a video, those adjustments will be retained when the media clip(s) are sent to Sanction. See Editing videos for additional information.

To bulk send annotations as Sanction media clips

1. Open a case in **Sanction® 3.5** or later.

2. In the **Transcripts** pane, select a transcript from the list that has both annotations and video.

The video icon indicates a transcript with video.

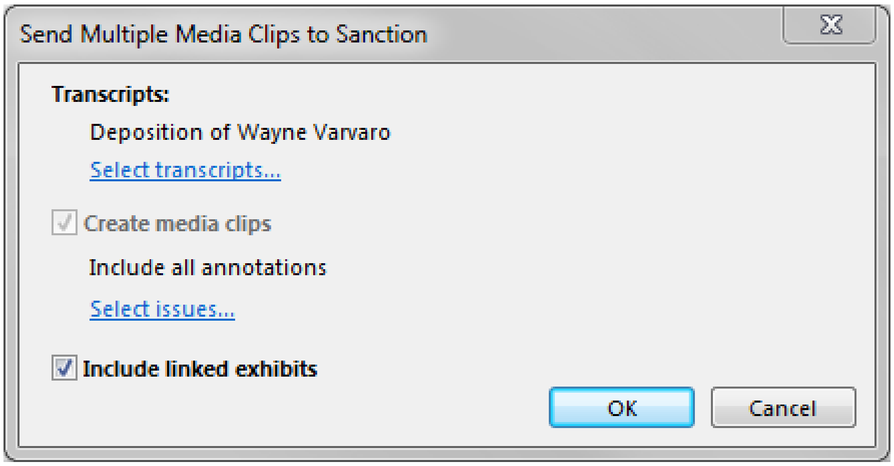


3. Select the annotations to be sent to Sanction to display the Text & Video Tools ribbon.

4. On the **Options** tab, click **Send Multiple Media Clips**.

   You can also right-click on the annotations to be sent, click Send To, and then click Sanction - Multiple Media Clips.

5. In the **Send Multiple Media Clips to Sanction** dialog box, perform all applicable steps:



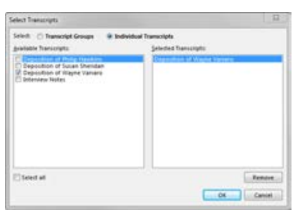
To select multiple transcripts

a. In the **Select Transcripts** dialog box, click **Transcripts Groups** to list transcripts by groups, or click **Individual Transcripts** to list transcripts individually.

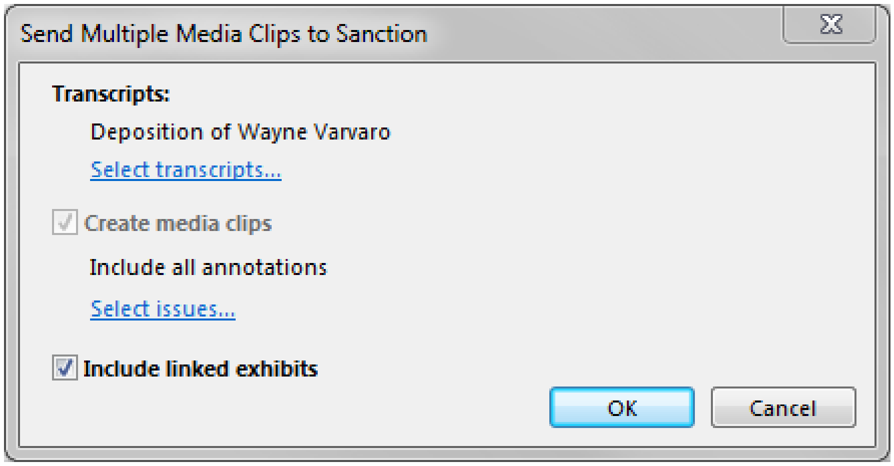
   For this example, Individual Transcripts is selected.

b. In the **Available Transcripts** column, place a check mark beside the transcript(s) to be sent to Sanction.

   Optional: Place a check mark in the Select all check box to simultaneously select all transcripts.



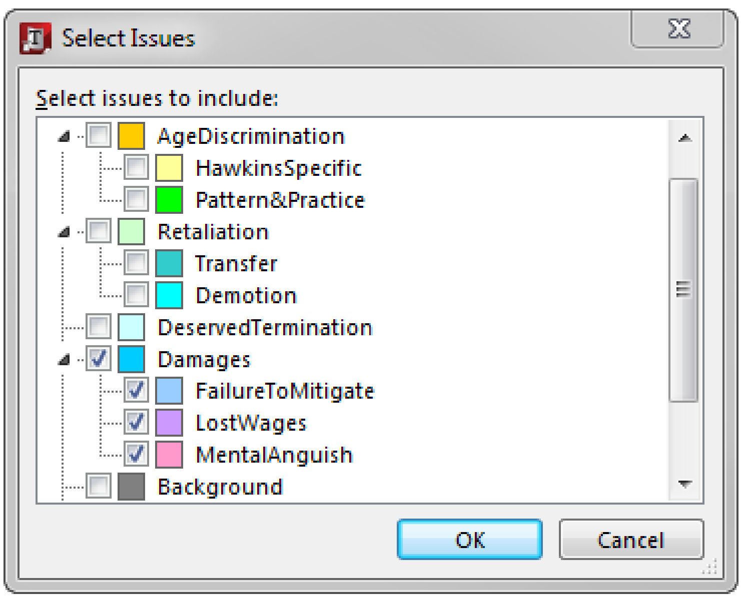
c. Click **OK** to display the **Send Multiple Media Clips to Sanction** dialog box.



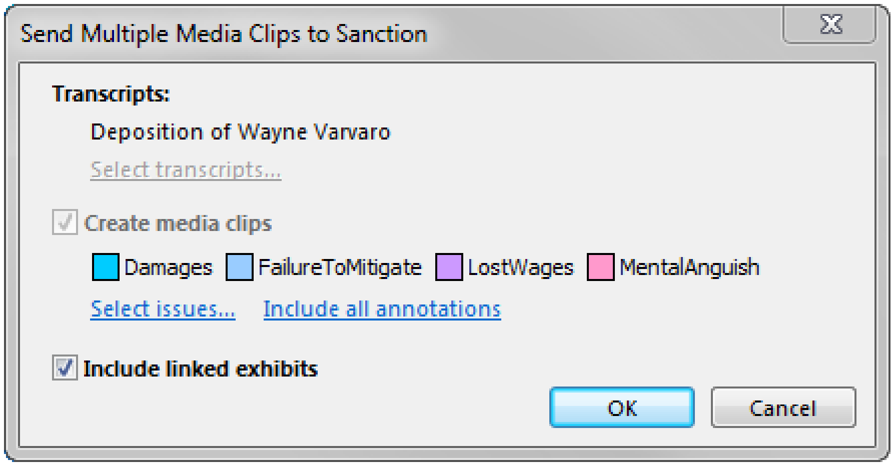
To send media clips by issue

a. In the **Send Multiple Media Clips to Sanction** dialog box, click **Select issues** to open the **Select Issues** dialog box.

b. In the **Select Issues** dialog box, select (place a check mark) beside the issue(s) associated with media clip(s) to be sent to Sanction.



c. Click **OK** to display the information being sent to Sanction.



The issues selected here are recalled the next time the Send Multiple Media Clips to Sanction dialog box is opened, unless otherwise changed.

d. Optional: Click **Include all annotations** to deselect the issues selected in the step above and to return to sending all annotations to Sanction.

e. Click **OK** to continue.

Related Topics

[About transcripts](#)
[About annotations](#)
[Sending transcripts to Sanction](#)
[Editing videos](#)

Keyboard Shortcuts

Using keyboard shortcuts

TextMap offers numerous keyboard shortcuts for the application, transcripts, annotations, dialog boxes, and lists, and for searching and editing transcripts. You can also create your own keyboard shortcut and edit existing shortcuts.

You can print a hard copy of the keyboard shortcuts for reference by printing the TextMap Quick Reference Card.

Available Keyboard Shortcuts:

General

The following list includes the default keyboard shortcuts you can use in TextMap for the software application.

Keyboard Shortcuts: General	
Shortcut Keys	**Use**
F1	Opens online help.
F2	Opens Transcript Properties dialog box.
Alt + F1	View or hide the Navigation pane when transcript is open.
Ctrl + 2	Opens the Exhibits and Video pane in the Navigation pane.
Ctrl + 3	Opens Annotation Detail in the Navigation pane.
Ctrl + 6	Opens and closes the Annotations pane.
Shift + F10	Displays the shortcut (right-click) menu that includes the Send Transcript to CaseMap, Hyperlink, Send To, and Annotation Mode functions.
Ctrl + N	Creates a new case. Closes your current case.
Ctrl + O	Opens a message box to register a CaseMap Server.

Dialog Box

The following list includes the default keyboard shortcuts you can use in TextMap for dialog boxes.

Keyboard Shortcuts: Dialog Boxes	
Shortcut Keys	**Use**
Spacebar	Toggles the state of check boxes or option boxes.
Esc	Cancels out of dialog boxes.
End	Moves cursor to the last item in a list.
Tab	Moves cursor left to right and top to bottom.

Keyboard Shortcuts: Dialog Boxes	
Shortcut Keys	**Use**
Shift + Tab	Moves cursor right to left and bottom to top.
Ctrl + Left or Right Arrow	Moves cursor one word at time left or right.
Ctrl + Shift + Left or Right Arrow	Selects one word at a time to the left or right of cursor.
Delete	Deletes the characters or contents of a text box.

List

The following list includes the default keyboard shortcuts you can use in TextMap for lists.

Keyboard Shortcuts: Lists	
Shortcut Keys	**Use**
Home	Moves cursor to the first item in a list.
End	Moves cursor to the last item in a list.
Tab	Moves cursor to the left or right of an item in a list.

Annotations and Redactions

The following list includes the default keyboard shortcuts you can use in TextMap for annotations and redactions.

Keyboard Shortcuts: Annotations and Redactions	
Shortcut Keys	**Use**
Ctrl + F7	Displays first annotation in the Annotations pane.
F7	Displays previous annotation in the Annotations pane.

Keyboard Shortcuts: Annotations and Redactions	
Shortcut Keys	**Use**
Ctrl + F8	Displays last annotation in the Annotations pane.
F8	Displays next annotation in the Annotations pane.
Alt + H	Toggles the state of check boxes or option boxes for the Highlighting section in the Annotations pane.
Ctrl + R	Opens the New Redaction dialog box.

Transcript

The following list includes the default keyboard shortcuts you can use in TextMap for transcripts. You can also customize keyboard shortcuts.

Keyboard Shortcuts: Transcripts	
Shortcut Keys	**Use**
Home	Moves cursor to the beginning of a line.
End	Moves cursor to the end of a line.
Ctrl + Home	Moves cursor to the beginning of the transcript.
Ctrl + End	Moves cursor to the end of the transcript.
Insert	Open the New Annotation dialog box when text is selected.
Ctrl + F	Opens the Find dialog box.
Ctrl + G	Opens the Go To dialog box.
Ctrl + I	Sends information to CaseMap when text is selected.
Ctrl + K	Opens new hyperlink wizard when text is selected.
Shift + F10	Displays the right-click menu when text is selected.
Left or Right Arrow	Moves cursor to left or right.
Up or Down Arrow	Moves cursor up or down.

Keyboard Shortcuts: Transcripts	
Shortcut Keys	**Use**
Ctrl + Shift + Left or Right Arrow	Selects letters to left or right of cursor.
Ctrl + Shift + Up or Down Arrow	Selects lines to the left or right of the cursor to the beginning or the end of the line.
Ctrl + Left or Right Arrow	Moves cursor one word at time left or right.

Transcripts pane

The following list includes the default keyboard shortcuts you can use in TextMap for navigating transcripts in the Transcripts pane. You can also customize keyboard shortcuts.

Keyboard Shortcuts: Transcripts pane	
Shortcut Keys	**Use**
Left Arrow	Collapses a selected transcript group when the group name is selected.
Right Arrow	Expands a selected transcript group when the group name is selected.
Up or Down Arrow + Enter	Navigates transcripts within the Transcript pane. Press Enter to display the selected transcript in the Transcripts window.

Search

The following list includes the default keyboard shortcuts you can use in TextMap for searching. You can also customize keyboard shortcuts.

Keyboard Shortcuts: Search	
Shortcut Keys	**Use**
Ctrl + 2	Cancels out of message boxes.

Keyboard Shortcuts: Search	
Shortcut Keys	**Use**
Ctrl + S	Moves cursor to the last item in a list.

Search Results

The following list includes the default keyboard shortcuts you can use in TextMap for search results. You can also customize keyboard shortcuts.

Keyboard Shortcuts: Search Results	
Shortcut Keys	**Use**
Ctrl + F4	Moves cursor to first result.
F4	Moves cursor to previous search result.
Ctrl + F5	Moves cursor to last result.
F5	Moves cursor to next search result.

Editing

The following list includes the default keyboard shortcuts you can use in TextMap for editing. You can also customize keyboard shortcuts.

Keyboard Shortcuts: Editing	
Shortcut Keys	**Use**
Ctrl + A	Selects all the text in a transcript.
Ctrl + C	Copies selected text in a transcript to the clipboard.
Ctrl + Alt + C	Copies selected text in a transcript, including page line to the clipboard.
Ctrl + V	Pastes text from the clipboard.

Related Topics

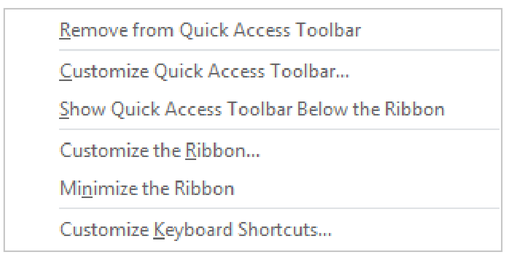
[Creating or editing keyboard shortcuts](#)

Creating or editing keyboard shortcuts

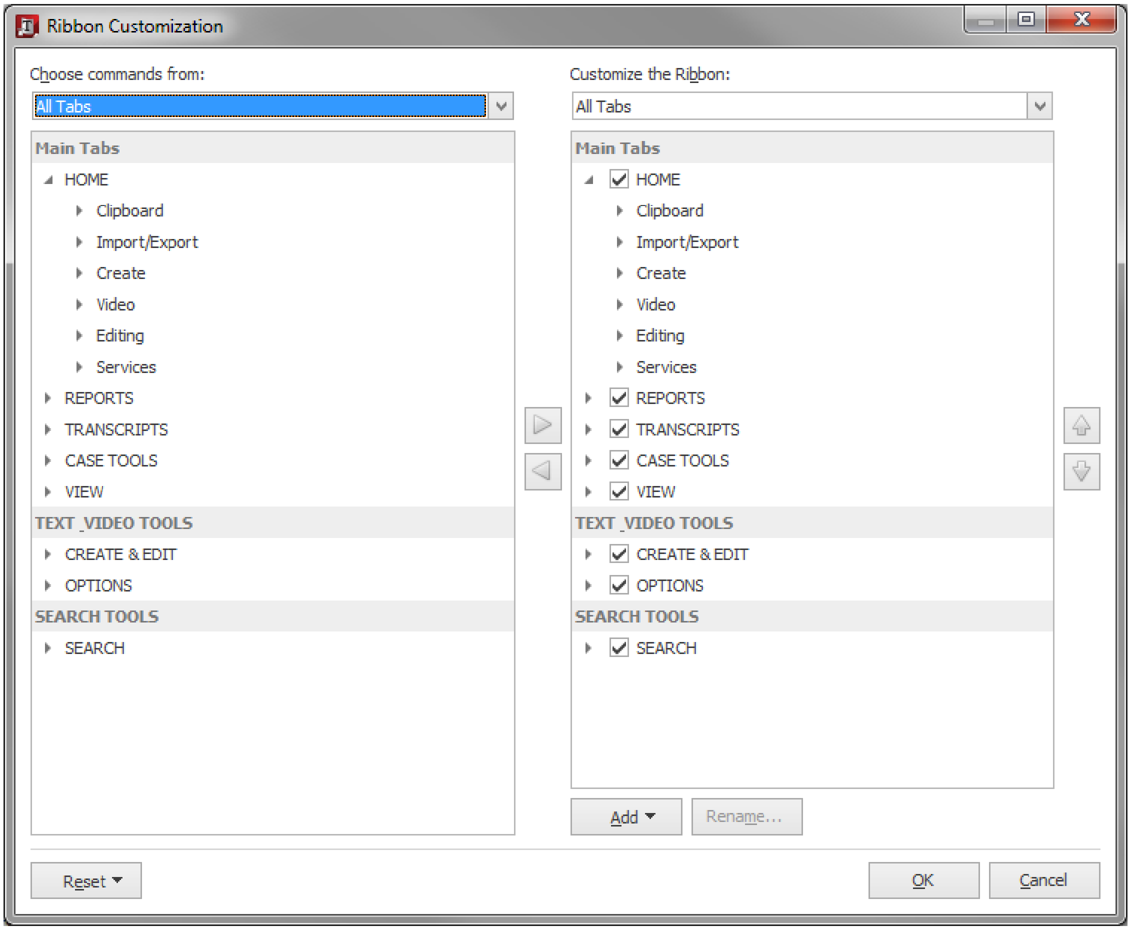
TextMap offers numerous keyboard shortcuts to address most all of your needs. You can add or edit a shortcut key, if the need arises.

To customize ribbons

1. In **TextMap**, right-click on the **Quick Access** toolbar or on any ribbon to display the set of menu options.



2. Click **Customize the Ribbon**.
3. In the **Ribbon Customization** dialog box, in the **Choose commands from** box, select an applicable option from the list.



4. Under the **Customize the Ribbon** heading, place a check mark next to the tab(s) to be displayed.

5. Use the applicable up  or down  arrow to place appropriately.

6. **Optional: To add a new tab**

   a. Under the **Customize the Ribbon** heading, select the tab/area where the new tab is to be added.

   b. Click the **Add** button and then click **Add New Tab**.

      A new tab is added.

   c. Click the **Rename** button.

   d. In the Display name box, enter a new name for the tab.

   e. Click **OK**.

      The new name is displayed.

   f. Click **OK** to close the **Ribbon Customization** dialog box.

7. **Optional: To reset customized ribbon settings**

   a. Click the **Reset** button in the bottom left-hand corner and select:

   Reset on selected tab to reset only settings for the selected tab.

   Reset all customizations to reset all customized settings back to the default system settings.

   b. Click **OK**.

8. Click **OK** to close the Ribbon Customization dialog box.

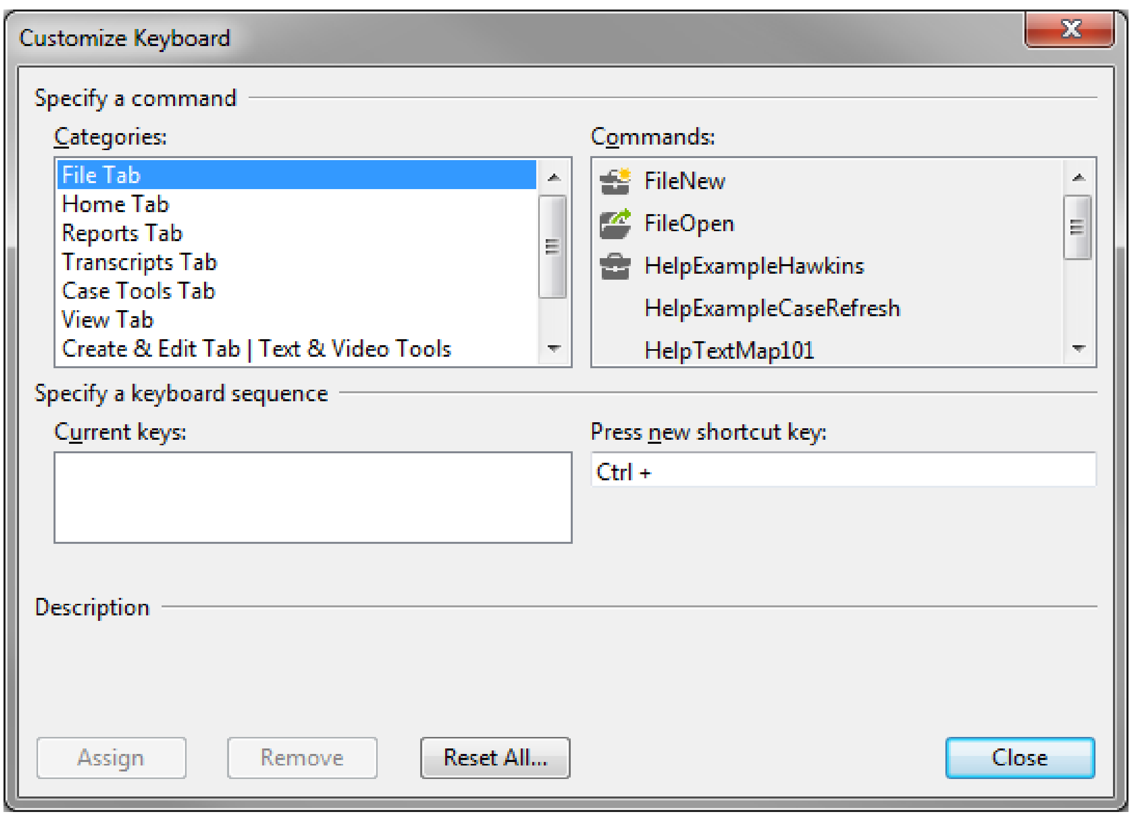
   An updated toolbar displays.

To create or edit keyboard shortcuts

1. Right-click on the **Quick Access** toolbar or any ribbon, and on the menu list, select **Customize Keyboard Shortcuts**.

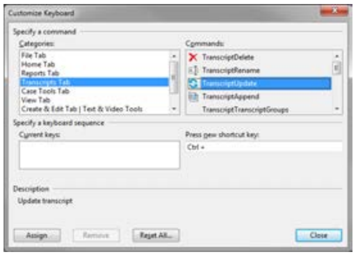
   You can also right-click on any ribbon.

2. In the **Categories** list of the **Customize Keyboard** dialog box, select the menu for which you want to assign a command.



4. In the **Commands** list, select the command (or action) you want to use.

If there is already a keyboard shortcut for this category or command, it will display in the Current keys box with a description below indicating its current use.



5. In the **Press new shortcut key** box, type in the shortcut key you want to use (ex: Ctrl + D).

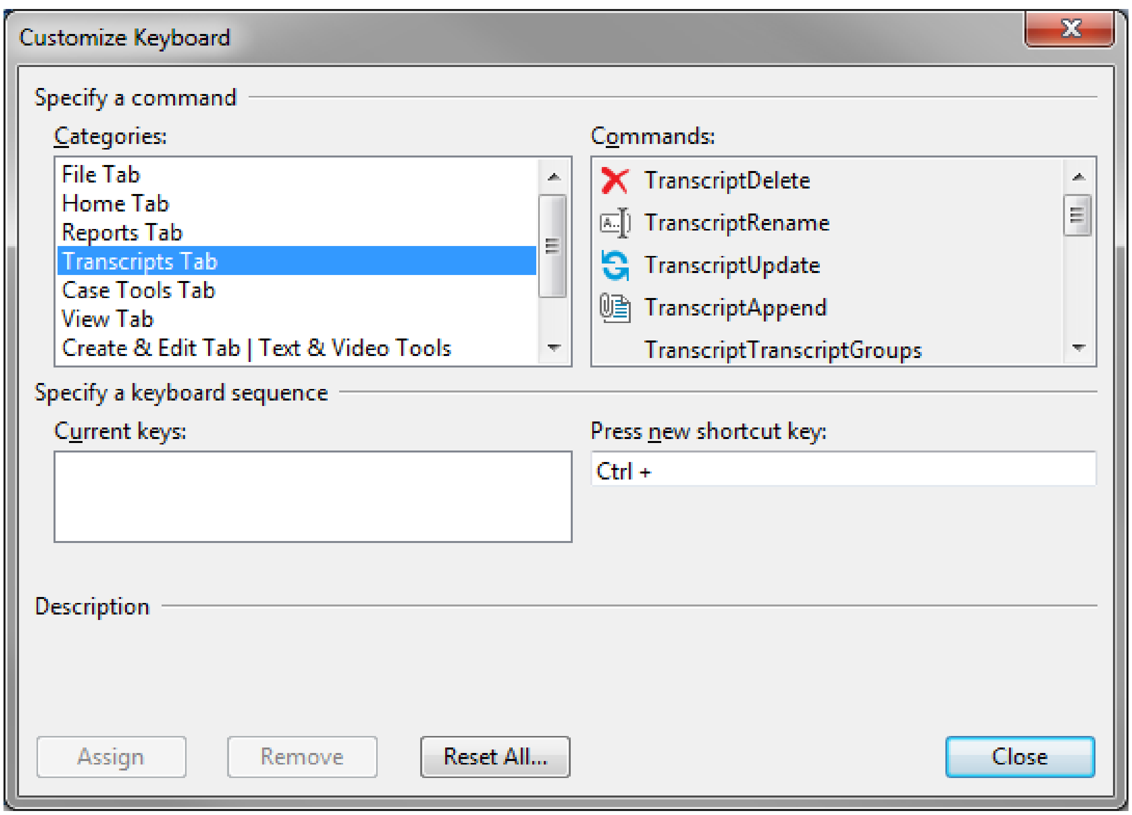
6. Click the **Assign** button to save the custom shortcut key.

7. Click **Close** twice to return to TextMap.

To unassign an existing keyboard shortcut

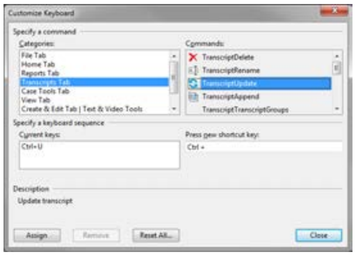
1. Right-click on the **Quick Access Toolbar**, and then select **Customize Keyboard Shortcuts**.

2. In the **Categories** list of the **Customize Keyboard** dialog box, select the menu for which you want to unassign a command.



3. In the Commands list of the **Customize Keyboard** dialog box, locate the associated

command for the keyboard shortcut.



4. In the **Current keys** box, highlight the keyboard combination and click the **Remove** button.

5. Click **Close** to return to TextMap.

If you click the Reset All button, all key commands return to their original default settings.

Related Topics

[Using keyboard shortcuts]

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