

Contents

About the Author	ix
Acknowledgments	xi
CHAPTER 1	
Introduction	1
<hr/>	
Why CaseMap	1
Expectations and Objectives	3
The Theory of CaseMap	4
About CaseMap 9	8
CaseMap 9 Case File Types	9
CaseMap 9 SQL Administration	9
CHAPTER 2	
Getting Started	11
<hr/>	
Logging On	11
Basic Terms	13
The Demo Case (“Hawkins”)	14
Creating a New Case	15
CaseMap Windows & Toolbars	21
Viewing Files	24
Spreadsheets (Overview)	25
<i>Facts Spreadsheet</i>	26
<i>Objects Spreadsheet</i>	29
All Objects Spreadsheet	29
<i>Persons Spreadsheet</i>	29
<i>Organizations Spreadsheet</i>	31

<i>Documents Spreadsheet</i>	31
<i>Other Physical Evidence Spreadsheet</i>	32
<i>Events Spreadsheet</i>	32
<i>Places Spreadsheet</i>	32
<i>Pleadings Spreadsheet</i>	32
<i>Proceedings Spreadsheet</i>	33
<i>Other Discovery Spreadsheet</i>	33
<i>Demonstrative Evidence Spreadsheet</i>	33
<i>Other Objects Spreadsheet</i>	34
Issues	34
<i>Creating and Working with Issues</i>	35
Other Shortcuts	38
<i>Research Spreadsheets</i>	38
<i>Research Authorities Spreadsheet</i>	38
<i>Extracts from Authorities Spreadsheet</i>	40
<i>Authorities and Extracts Spreadsheet</i>	41
<i>LexisNexis</i>	41
<i>Question Fields</i>	42
<i>Update History Fields</i>	43
Customizing CaseMap	43
<i>The Customize Menu</i>	43
<i>The Options Menu</i>	49
General Options	49
Dates	51
Documents	52
Research	53
File Locations	53
Scripting, Send to Plug Ins, and ReportBook Plug Ins	54
Accessibility	54
<i>Changing Fonts</i>	54
<i>Row Heights</i>	55
Views	56
<i>Default Views</i>	56
<i>Creating Views</i>	59
<i>Arranging and Manipulating Columns</i>	65
CHAPTER 3	
Entering Case Information	69
<hr/>	
Introduction	69
Full Names and Short Names	69
<i>Full Names</i>	71
<i>Short Names</i>	71

Creating and Naming Objects	72
Merging Objects	72
<i>Document Naming Tips</i>	73
<i>Dates/Date Stamper</i>	76
<i>Times</i>	79
<i>Time Zones</i>	80
<i>Date Ranges</i>	80
<i>Fuzzy Dates</i>	81
<i>Date Sequencing</i>	82
Date Navigator	83
Entering Facts and Data into a Spreadsheet	83
Entering Facts and Other Information—An Overview	85
<i>Entering a Simple Fact</i>	85
<i>Entering a Fact and Creating Objects on the Fly</i>	87
<i>Linking an Object from the All Objects or Specific Spreadsheet</i>	91
<i>Using All Objects View</i>	92
<i>Entering New Facts</i>	93
Creating a Fact Chronology	93
Links	96
Using Links Effectively	97
Quick Linking of Facts to Sources	97
<i>Link Summary Fields</i>	98
<i>Link Assistant</i>	99
<i>Record Detail/Detail Dialog Boxes</i>	102
Creating an Issues Outline	103
<i>The Bulk Issue Linker</i>	104
<i>Linking Facts, Objects, and Questions to Issues</i>	105
Viewing Information and Updating Information	107
<i>Fields</i>	107
<i>Detail Views</i>	109
Fact Detail Boxes	109
Object Detail Boxes	109
Issue Detail Boxes	111
Question Detail Boxes	112
Research Detail Boxes	113
<i>Custom Fields</i>	115
<i>Intake Interview Jumpstart</i>	116
<i>Research Directly from Persons in Your CaseMap Database</i>	118
<i>Importing Information</i>	119
Importing Text Files	119
Importing E-mail from Outlook	122
DocPreviewer: Convert & Import Outlook E-mail	123
Outlook E-mail Linker	125
Importing Issues from NoteMap	126

CHAPTER 4

Analyzing, Searching and Preparing Reports of Case Data 127

Basic Searches	129
Advanced Searches	132
Find vs. Filter	134
Tagging	135
AND versus OR	136
The Bates Analyzer	137
Reports	139
<i>Reports Menu</i>	140
Page Setup	140
Page Tab	141
Report Options Tab	143
Title Page Tab	145
Title Page Info Tab	146
Case Options Tab	147
Print or PDF Current View	148
Send Current View to Reports	150
Send to TimeMap	150
Send to NoteMap (or Your Word Processor)	151
Send Current View to Word, Word Perfect, or Web Browser	151
Send Current View to Excel	152
<i>Other Report Wizards</i>	152
By Issue Report Wizard	152
By Object Report Wizard	152
<i>Report of Facts Spreadsheet Report</i>	153
<i>Summary Judgment Wizard</i>	154
<i>Printing a Spreadsheet</i>	157
PDF Printing	158
HTML (Web Page) Printing	158
<i>Send to Features and Formats</i>	158
<i>CaseWide</i>	160
<i>Simple Filter Report</i>	161
ReportBooks	162
<i>ReportBook Tools</i>	168
<i>ReportBooks Overview Report</i>	169
<i>The Various ReportBooks</i>	169
Introduction	169
The Specific ReportBooks	170
Printing ReportBooks	171

Customizing ReportBooks	171
Exporting and Importing ReportBooks	172
<i>Privilege Log Wizard</i>	172
Evaluation Fields	175
<i>Issue Traits and Evaluation Field Features</i>	176
<i>Evaluation Comparison Dialog</i>	176
<i>Evaluation Comparison</i>	178
<i># Fields</i>	179
CHAPTER 5	
Case Tools	181
<hr/>	
Auto Number Records	181
The Adobe Acrobat DocPreviewer	181
Integration With Other Applications	187
Bulk Field Copy Tool	187
Bates Analyzer	187
Bates Stamp Tools	188
Case Optimizer	191
File Viewers	191
Bulk Change File Viewer	192
Spelling and AutoCorrect Options	192
<i>Spell-Checking</i>	194
Replicas: Replication and Synchronization	194
Managing Case Staff	199
<i>Adding Staff Members</i>	199
<i>Staff Types</i>	200
<i>Changing Staff Passwords</i>	200
Backup and Restoring	201
<i>Backups</i>	201
<i>Restore</i>	202
Case Scripts	202
<i>Create a New Case Script</i>	202
<i>Copy a Case Script</i>	202
<i>Run a Case Script</i>	202
Creating a Case Template	203
Bulk Field Update	204
Bulk Import PDFs	204
Bulk Issue Linker	205
Short Name Assistant	205
Object Link Merger	205

Facts Linked to Selected Objects Utility	205
Change Linked File Paths Utility	205
Delete All Records in View	206
<i>Batch Processing</i>	207
Appendix	209
<hr/>	
Index	213
<hr/>	