

What's New in CaseMap 10

General user-interface changes:

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

Create custom spreadsheets:

- CaseMap now provides the ability to create custom sub-object spreadsheets. New custom spreadsheets contain five default fields: Full Name, Short Name, Role In Case, Key, and # Facts. Additional fields can be added to the new spreadsheet as needed.
- When a new spreadsheet is added, it can be used just like any other CaseMap spreadsheet. Data can be sent to it immediately using the Send to CaseMap tool. All reporting options are also available on new spreadsheets.
- CaseMap offers more customization options for spreadsheets than ever before, including the ability to:
 - Rename many sub-object spreadsheets to best suit organizational needs.
 - Delete spreadsheets from the Case Shortcuts pane.
 - Change the spreadsheet display order in the Case Shortcuts pane.

New Import Linked Files Wizard to bulk import files:

- Use the new Import Linked Files Wizard to import one or more files into a spreadsheet at one time. CaseMap automatically creates new records for each file while linking to the source file saved in a network folder.
- Use the wizard to import a folder of files, including files saved in subfolders. The Import Linked Files Wizard is the quickest and easiest method of populating a CaseMap case with multiple documents at one time.
- NOTE: The "Bulk Import PDF's" feature is still available, but it is accessed from the "Tools... Linked Files..." menu.

Print reports with embedded files:

- Reports and ReportBooks can now be printed with embedded files when printing to a PDF file. Reports with embedded links to attached files can now be shared with others who do not have access to CaseMap or the case.
- CaseMap will only embed files that are in the Linked Files field in the object spreadsheets or the Authority and Extracts spreadsheet or Source(s) field for the Facts spreadsheet. During the print process, large documents or confidential documents can be removed.
- Once the report is printed to PDF, spreadsheet records with linked documents or files will display a paperclip icon. Clicking the paperclip icon opens the linked document in a new window, in its native application.

OCR processing of linked files:

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

Search spreadsheets, linked file content, and annotations:

- CaseMap now offers full-text search capabilities for spreadsheet records and linked files. Full-text searching also includes the ability to search annotation notes, restrict searches to select spreadsheets, and re-run recent searches. Full-text searching in CaseMap supports many of the common search operators used to produce precise search results.
- Search results display in a new Search Results navigation pane with a list of each spreadsheet that contains field text hits or linked files with search hits. The number of search hits returned for each spreadsheet also displays. Use the Narrow Results panel to view only those records that contain hits for spreadsheet fields, linked file text hits, or annotation note hits.
- Selecting a spreadsheet in the Search Results navigation pane displays the records with hits from that spreadsheet. Linked files that contain search hits display a file icon that opens the linked file. Annotated records with notes that contain search hits display an icon in an Annotation Note Hit column. Annotated notes can be previewed in a pop-up window when a mouse pointer is placed over the icon.

Print search results from three different report options:

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

Send facts from Microsoft Word or Microsoft Outlook emails :

- Send fact text and documents directly from Microsoft® Word 2007 and 2010 (32-bit versions). The Send to CaseMap features display on a CaseMap ribbon within Word. The Word plug-in is optional during CaseMap installation.
- Use CaseMap's Outlook plug-in to send emails from Microsoft® Outlook 2007 and 2010 to a CaseMap v10+ case. In Outlook 2007, the Send to CaseMap features display on a CaseMap menu as a toolbar button and as a CaseMap ribbon. In Outlook 2010, it displays as a CaseMap ribbon. The Outlook plug-in is optional during CaseMap installation.

DocManager:

(NOTE: DocManager is a new “add-in” program that is purchased and activated separately.)

- **View linked files in the DocManager near native viewer**
 - CaseMap is integrated with the new DocManager near native image viewer. Use DocManager to review and annotate documents and images without having to open the source file in its native application. Annotations can also have searchable notes that edited later. Annotation notes display as search results findings when the notes match the search query.
 - When a search is run in CaseMap, search hits will be highlighted in DocManager allowing for easier content review and navigation between search hits. Once content is reviewed and annotated, the annotations and notes are automatically saved. When printing annotated files, there is an option for including annotations and notes when printing to PDF.

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

- **Batch print linked files**
 - CaseMap's DocManager add-in includes a Batch Print Wizard that allows for printing documents linked to object spreadsheets, research spreadsheets (Authorities and Extracts from Authorities spreadsheets), and the Facts spreadsheet. Linked documents can be printed to a printer, or PDF or TIFF file. The wizard provides an option for removing any documents from the selected batch prior to printing.
 - If documents are annotated, the Batch Print Wizard includes an option to print to PDF with or without annotations and notes or burn the annotation as a permanent part of the content (without notes). The annotation color for printing annotations can be also be modified.
 - The Batch Print Wizard also provides the ability to apply Bates stamps to documents included in the printed output. Various Bates stamp settings allow for customizing the Bates number, the stamp style, and its placement on the printed document.