

The Differences Between CaseMap Versions

CaseMap®, Version 11.0 and CaseMap 10.3

- **What's New in CaseMap**
- **What's Different Between the Versions**
- **What's been removed**
- **Converting Previous Versions**



CaseMap Version Differences

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

Version: CaseMap® 11
Release Date: January 08, 2015

What's New in CaseMap 11.0

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

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

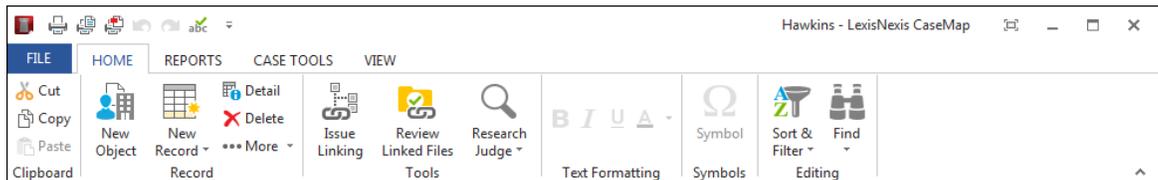
Additional ribbons (Outline, Linked Authority Tools, and DocManager) are displayed when tasks utilizing their spreadsheet's functions are required.

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

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

Ribbons

CaseMap's ribbons (a set of toolbars placed on multiple tabs) are located at the top of the CaseMap screen and are now used by default to access your most commonly used tasks and functions.



The main ribbons are the:

File tab

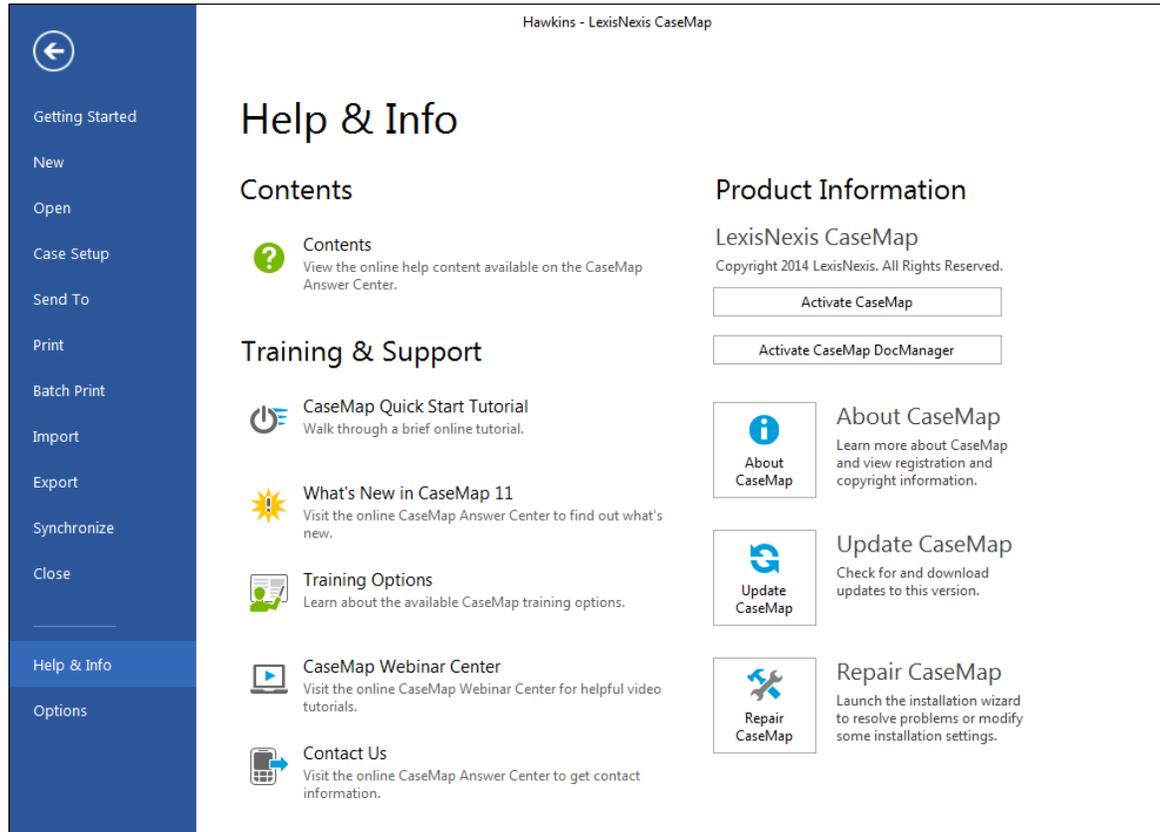
The File tab contains menu items useful in accessing and managing your case. It has options for importing and exporting data from other applications, changing case settings, sending spreadsheet records to other applications (e.g., LexisNexis Sanction, etc.), creating replicas, and synchronizing data from a replica case with the master file.

Printing options are also listed on this menu, and you can view case properties as well.



The File tab also provides access to the CaseMap Answer Center as well as a variety of other reference materials. From this tab (File Tab > Help & Info), you can also reference your CaseMap license and registration information, activate the software, check for product software Web updates, learn more about CaseMap and other LexisNexis products.

You can also run the maintenance program, Detect and Repair the application from here too.



Home ribbon

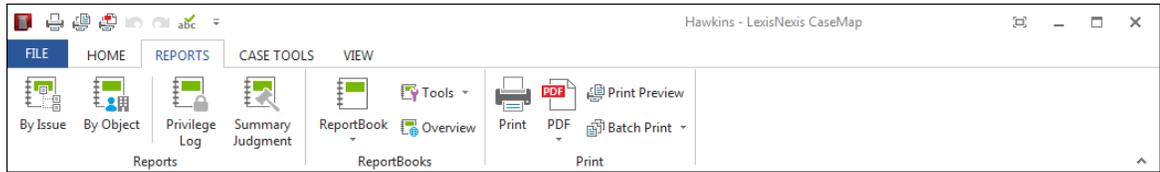
The Home ribbon contains menu items for editing and formatting text information within a spreadsheet record: Cut, Copy, Paste, Sort, Filter, Find, and Replace. You can also permanently delete a record from the case.

The Home ribbon also allows you to quickly add a new record, a new question linked to a selected record, objects to a spreadsheet, run filters, sort the spreadsheet, and to change the format and fields in the spreadsheet. The command to insert a symbol, like a registered trademark, is available here too. Other tools allow you to view all available fields for a record by opening the Record Detail box and to open Linked Files for a record.



Reports ribbon

The Reports ribbon contains all reporting options, including the ReportBooks submenu. From here you can access print options as well as export report data to other applications. Here you will also find wizards to assist in creating common reports, like the Privilege Log.



Case Tools ribbon

The Case Tools ribbon allows you to access primarily advanced user or administrative tools for working with or customizing cases, such as accessing the Case Optimizer, Case Index menu and Case Scripts menu, and the Create Case Template Wizard. The Case Tools ribbon contains a variety of tools used for analyzing and managing case data. It also provides you access to functions which allows you to perform bulk record and linked files updates for working with PDF files and other files and viewers.



View ribbon

The View ribbon contains commands that help modify the CaseMap user interface based on your viewing preference. You can choose to show/hide the Navigation pane and/or Task Panes (Issue Linking), to include accessing CaseWide which allows you to scroll, toggle, and drill-down for different perspectives of your case timeline. You can also access the Linked Authority split-screen view from the Authorities and Extracts spreadsheet. Use the Current View submenu to toggle to a different view of the spreadsheet or to access the Define Views dialog box for maintaining the views on spreadsheets.



The Outline Tools, Linked Authority Tools, and the DocManager ribbons are additional ribbons which are displayed when their spreadsheet tasks/functions are performed.

Outline Tools ribbon

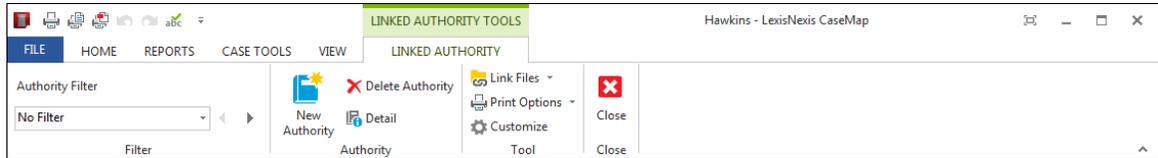
The Outline Tools ribbon which is only accessible when the Issues spreadsheet is selected. It allows you to make adjustments to outline entries and to the number of outline levels displayed.



Linked Authority Tools ribbon

The Linked Authority Tools ribbon which is only accessible when the Authorities and Extracts spreadsheet is selected, allows you to create, delete, and/or view record details. You also have the ability to view linked files, print, and/or customize spreadsheet views. You can also toggle between the Extracts from Authorities and the Authorities and Extracts spreadsheets.

This ribbon displays only when working in these two spreadsheets.



DocManager ribbon

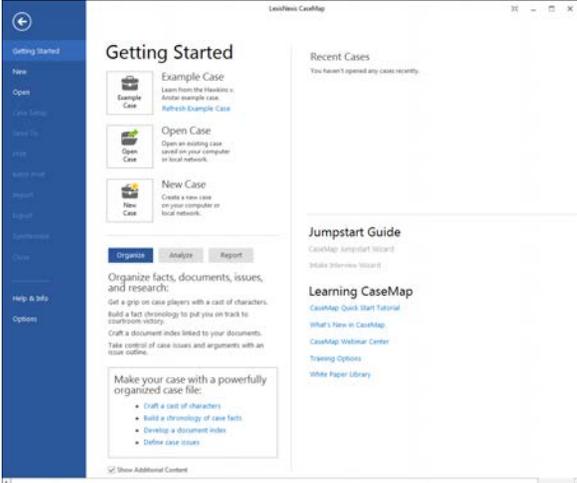
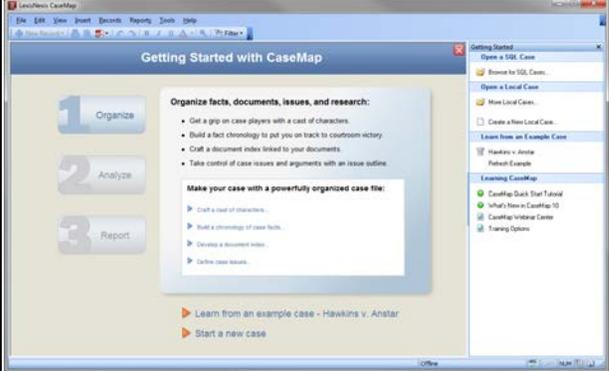
The DocManager ribbon allows you to review and annotate documents and images without having to open the source file in its native application. You can add notes to annotations, edit annotations and notes, and also search annotation notes. When a search is run, search hits are highlighted in DocManager allowing you to review content and navigate between search hits.

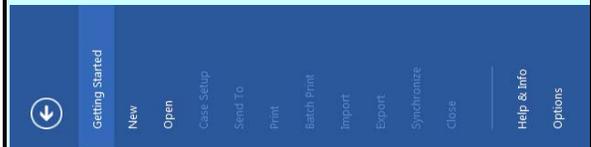
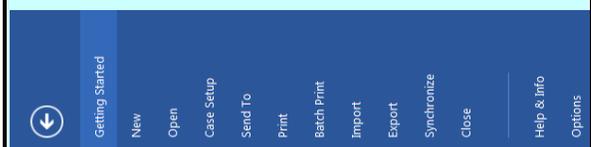
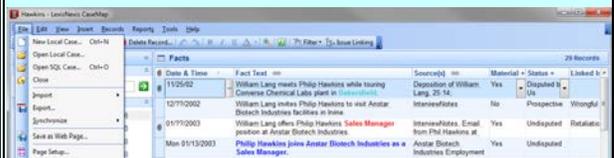
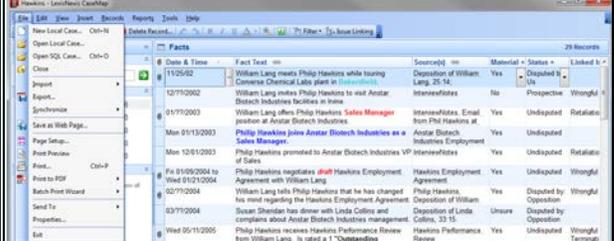
The DocManager also provides you with the ability to dock and undock documents and/or images in CaseMap using the Dock in Spreadsheet command.

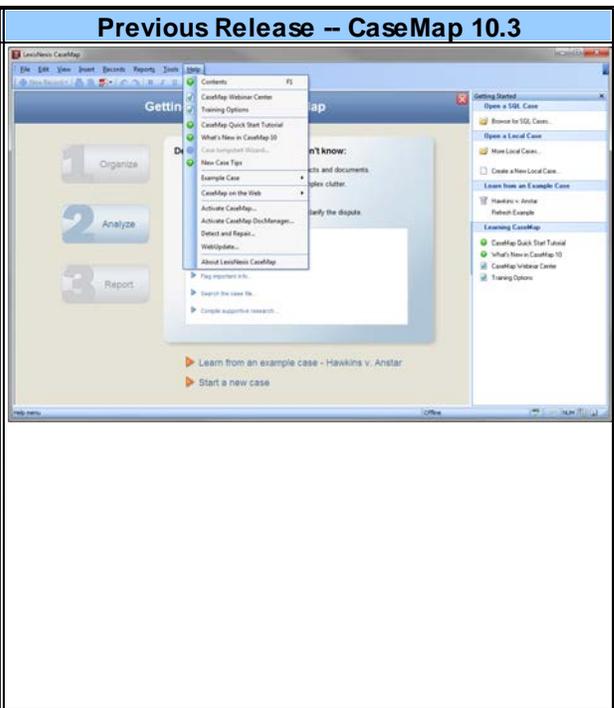
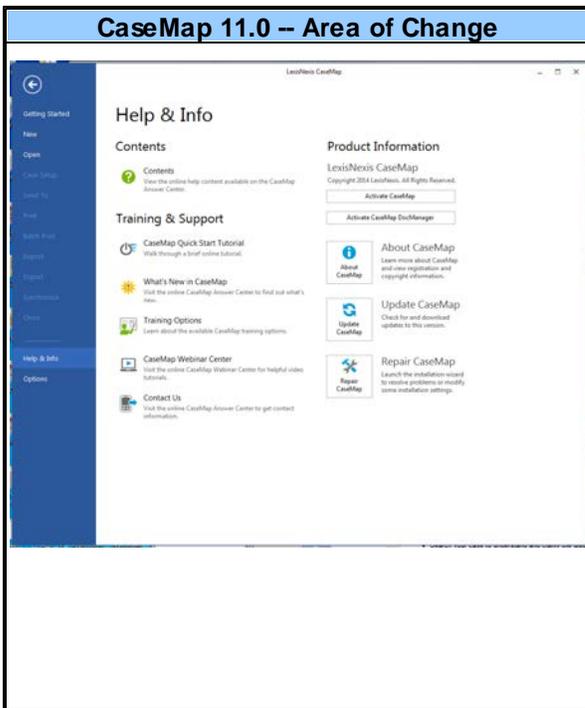


What's different between CaseMap 11.0 and CaseMap 10.3

This section summarizes the major changes between CaseMap 11.0 and CaseMap 10.3.

CaseMap 11.0 – Area of Change	Previous Release – CaseMap 10.3
<p>Getting Started Page</p> <p>When you first open CaseMap 11.0, the Getting Started Page which provides access to your case is displayed. The Getting Started Page now provides you with access to the File Tab where you can manage your account(s) from a single location.</p>  <p>Both, the CaseMap Jumpstart Wizard and the Intake Interview Wizard can now be accessed from the Getting Started Page. The CaseMap Jumpstart Wizard is also displayed after completing the New Case Wizard.</p>	<p>Getting Started Page</p> <p>With the release of CaseMap 10.3, although the Getting Started Page was displayed when the program initially opened, there was no immediate access to the File menu.</p>  <p>In CaseMap 10.3, the Intake Interview Wizard was accessed by clicking Tools > Intake Interview Jumpstart on the the Standard Toolbar. The CaseMap Jumpstart Wizard (used to populate the cast of characters in the case) was displayed after completing the New Case Wizard.</p>
<p>File Tab</p> <p>The File tab is now accessed from the Getting Started Page, or by clicking on the File tab/ Back button  while in the application. When the application is initially opened, access to the Getting Started Page, opening cases,</p>	<p>File Tab</p> <p>With previous releases of the CaseMap software, the File tab was located at the top of the workspace, on the Standard Toolbar.</p>

CaseMap 11.0 – Area of Change	Previous Release – CaseMap 10.3
<p>Help, product information and other options are available.</p> 	
<p>After selecting a case, access to additional menus and commands are available by clicking the File tab/Back button  while in the application.</p> 	<p>Once you accessed a case, the additional menu items/commands were available from the File tab.</p> 
<p>At this point, access to Case Setup page, sending spreadsheet data to LexisNexis® TimeMap, Sanction, NoteMap, Microsoft® Word, Corel® WordPerfect, or to Excel, creating replicas, and synchronizing data from a replica case with the master file is available.</p> <p>The File tab also provides you with options used for importing/exporting data from other applications, changing case settings from the Printing options, and access to case properties as well.</p>	
<p>Help and Info</p> <p>Located on the File tab is Help & Info which provides access to the CaseMap Answer Center as well as to a variety of other reference materials. From this tab (File Tab > Help & Info), you can also reference your CaseMap license and registration information, activate the software, check for product software Web updates, learn more about CaseMap and other LexisNexis products. You can also run the maintenance program, detect and repair the application from here too.</p>	<p>Help and Info</p> <p>With previous releases of the CaseMap application, the Answer Center, product Help, Training options, and other reference materials were accessed by clicking Help > Contents on the Standard Toolbar.</p>

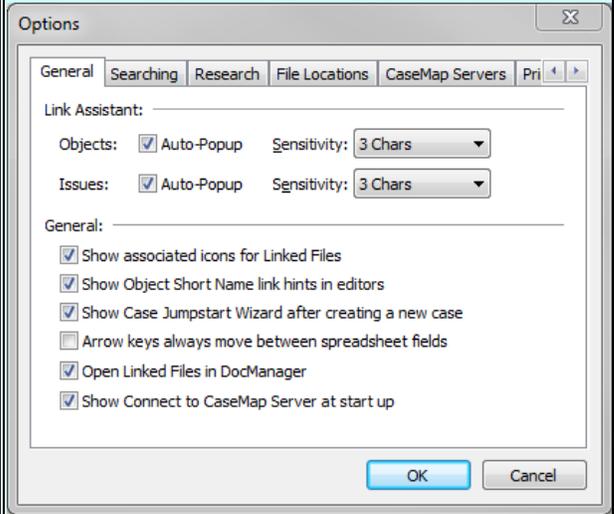
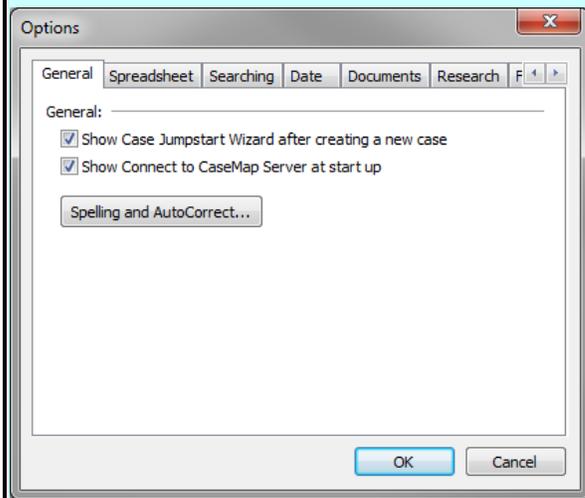


Options Tab

The Options menu is now located on the File Tab and can be accessed by clicking File Tab/ Back button  while in the application, and then click Options.

Options Tab

The Options menu was located on the Tools Tab and was accessed by clicking Tools Tab > Options while in the application.



With the release of CaseMap 11.0, a new Spreadsheet tab has been added to the Options dialog box. The new tab provides you with access to the Link Assistant, Linked Files, and general spreadsheet options used for customizations.

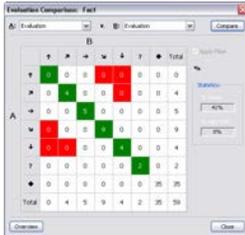
With previous CaseMap releases, the Options dialog box did not possess the Spreadsheet tab, and all spreadsheet options, including access to the Jumpstart wizard was included on the General tab of the Options dialog box.

The General tab of the Options dialog box has

CaseMap 11.0 -- Area of Change	Previous Release -- CaseMap 10.3
<p>been streamlined to provide you with access to the Case Jumpstart Wizard, connections to CaseMap Server at start up, and spelling options.</p>	
<p>Date Navigator Access</p> <p>To gain access to the Date Navigator in CaseMap 11.0, click Find on the Home ribbon, and then click Date Navigator.</p>	<p>Date Navigator Access</p> <p>With the CaseMap 10.3 release, the Date Navigator was accessed by clicking the Edit tab on the Standard menu, and then clicking Date Navigator.</p>
<p>Issue Linking Pane Access</p> <p>The Issue Linking Pane can be accessed by clicking the Issue Linking tab on the Home ribbon in CaseMap 11.0.</p>	<p>Issue Linking Pane Access</p> <p>The Issue Linking Pane was accessed from the View Tab in CaseMap 10.3 by clicking View > Issue Linking Pane which provided access to the Issues Linking Pane and the Analysis Filter functions.</p>
<p>Refresh Spreadsheet</p> <p>The term Refresh Table the was used in CaseMap 10.3 and earlier to refresh a spreadsheet is now named Refresh Spreadsheet. Therefore, to refresh a spreadsheet in CaseMap 11.0 or later, click More on the Home Tab, and then click Refresh Spreadsheet, or F5.</p>	<p>Refresh Table</p> <p>To refresh a spreadsheet in CaseMap 10.3, Refresh Table was accessed by clicking the Records Tab, and then clicking Refresh Table, or F5.</p>

What's been removed

In previous releases of CaseMap (i.e., CaseMap 10.3), Evaluation tools were used to capture opinions regarding the information in a case. Access to the Evaluation Comparison dialog box was gained by clicking Records tab > Evaluation Comparisons.



Evaluation fields use symbols, instead of text to denote record status, and to track/communicate the strengths and weaknesses of your case. Having multiple evaluation fields made it possible to compare evaluations by performing a more thorough analysis of the similarities and differences between evaluations.

With the release of CaseMap 11.0, although evaluation fields and their associated symbols are still utilized with Facts, Questions, and Research spreadsheets, the ability to perform the following functions are removed:

[Create custom evaluation fields to track personal/staff opinions](#)

If a spreadsheet already contained a default evaluation field, you could add another one and name it based on its purpose. Having multiple evaluation fields made it possible to compare evaluations. Multiple evaluation fields can no longer be added to spreadsheets to capture opinions regarding the information in a case.

[Evaluation field comparisons are no longer performed](#)

Having multiple evaluation fields made it possible to compare evaluations. Although an evaluation field can be added to a Fact, Question, or Research spreadsheet is on is not already present, multiple evaluation fields can no longer be added a spreadsheet, nor can an evaluation field be added to any other type of spreadsheet (e.g., Persons).

Converting previous versions

CaseMap continues to allow you to convert previous version cases to the new current release version. For example, you can upgrade a CaseMap v10.0 case to a CaseMap v11.0 case and have it still write to a Microsoft® Access database. Use the CaseMap SQL Import Utility to migrate local cases to SQL cases.

When upgrading a previous version case to a new version, CaseMap recognizes the older case format, such as a CaseMap v10.0 file (.cm10 extension) and offers to convert it to the new version format for you. It only takes a minute or so to convert previous cases to the new CaseMap format.

During the conversion process, CaseMap does not change anything in your existing CaseMap file. It creates a brand new case and copies all information from the old case into the new one. Additionally, CaseMap changes the file extension of the older version, such as .cm10 to .001. This change keeps users from inadvertently reopening the old case and using a previous CaseMap license.

If a case already exists with the same name and extension, the numbers will increment to ".002" and ".003" to ensure a unique name. We recommend that you inform case staff when the import is complete and that the original case is now renamed.

✍ Previous versions of CaseMap are not used during the conversion process, so you can uninstall them at any time.

⚠ Once a case has been converted to a new version format, users can no longer access it using an older CaseMap version. We recommend that all users get new versions installed at the same time.

To convert cases to a new CaseMap version

1. On the **File** menu, click **Open**.
2. Click **Computer**, to open the **Open Local Case** dialog box.
3. In the **Open Local Case** dialog box, select/click on the case you want to convert to the newer version of CaseMap.
4. In the message box, review the selected case information, then click **OK**.
5. In the **Select the name and location of the converted case file** dialog box, ensure the File name, and then click **Save**.
6. In the message box confirming case conversion, note the location of the file, and then click **OK**.

The message box displays the directory location of the original case and its new file extension.