

Microsoft®  
**Windows 10**  
**Quick Reference Card**

**Start Menu**

**Account**

Click to switch to another account, lock the computer, or sign out

**Named Groups**

Tiles are organized into groups

**Live Tiles**

Click a tile to open an app

**Most frequently used apps**

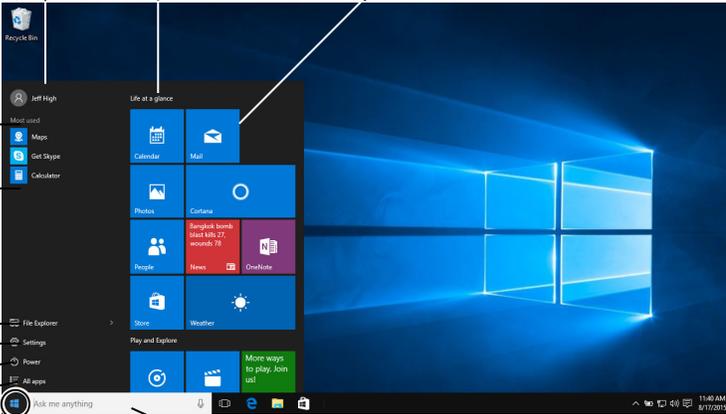
**File Explorer**  
**Settings**  
**Power**  
**All Apps**

**Start button**

Click here to open the Start menu

**Cortana**

Search for apps, files, or folders by typing in keywords, or saying the terms you're looking for



**Keyboard shortcuts**

**Basic Commands**

Start Menu	 <b>Win</b>
Copy a Folder/File	<b>Ctrl + C</b>
Cut a Folder/File	<b>Ctrl + X</b>
Paste a Folder/File	<b>Ctrl + V</b>
Cortana (speech)	 <b>+ C</b>
Cortana (text)	 <b>+ S</b>
Actions Center	 <b>+ A</b>
Task View	 <b>+ Tab</b>
Close App	<b>Alt + F4</b>
Lock computer	 <b>+ L</b>
Print	<b>Ctrl + P</b>
File Explorer	 <b>+ E</b>
Run dialog box	 <b>+ R</b>

**Start Menu**

- **To Open the Start Menu:** Click the **Start** button. Or, press **Win**.
- **To Resize App Tile on the Start Menu:** Right-click a tile, click **Size** and select a size.
- **To Rearrange Tiles:** Tiles are organized into groups of related apps. Drag a tile to a new location in a group, or drag it between groups to start a new group.
- **To Remove a Tile from the Start Menu:** Right-click the tile and click **Unpin from Start**.
- **To Add a Tile to the Start Menu:** Right-click the app and select **Pin to Start**.
- **To Stop Updating an App's Live Tile:** Right-click an app's tile and click **Turn live tile off**.
- **To Search for Files or Apps:** Click within the Search field and type a keyword for the file or app. Search results are displayed in the menu.
- **To Rename Live Tile Groups:** Click the Live Tile group's name, and type in a new name.
- **To Lock Your Computer:** Click the **Account** button and select **Lock**.
- **To Sign Out of Windows:** Click the **Account** button and select **Sign Out**.
- **To Switch Users:** Click the **Account** button and select another user account.
- **To Change Account Settings:** Click the **Account** button and select **Change Account Settings**.

**Apps**

- **To Launch an App:** Find and click the app's tile on the Start menu. Or, select **All Apps** from the Start Menu and select the app you want to open.
- **Jump to Different Apps:** In the **All Apps** list click a letter header, then select another letter, to display all of the apps that begin with that letter.
- **To Search for an App:** Click within the Search field and type a keyword for the app.
- **To View All Installed Apps:** Select **All Apps** from the Start Menu.
- **To Close an App:** Click the **Close** button in the top-right corner of the app. Or, press **Alt + F4**.
- **To Jump to an Open App:** Click the **Task View** button. Or, press **Win + Tab**. **Note:** Right-click an app and click **Close** to close it.
- **To Install an App:** Install apps from the Windows Store, media such as DVDs, or download from the Internet.
- **To Uninstall an App:** Click the **Start** button and select **Settings** from the Start Menu. Click the **System** category and select **Apps & features**. Select the app that you want to install and click the **Uninstall** button.

**Settings Shortcuts**

Open Settings	 <b>+ I</b>
Devices pane	 <b>+ K</b>
Sharing pane	 <b>+ H</b>
Display options for second screen	 <b>+ P</b>
Quick Link menu	 <b>+ X</b>

**Desktop shortcuts**

Desktop	 <b>+ D</b>
Maximize	 <b>+ ↑</b>
Minimize/Restore	 <b>+ ↓</b>
Switch between apps	<b>Alt + Tab</b>
Minimize all windows	 <b>+ M</b>
Snap app to left	 <b>+ ←</b>
Snap app to right	 <b>+ →</b>
New Desktop	 <b>+ Ctrl + D</b>
Close Current Desktop	 <b>+ Ctrl + F4</b>
Switch Desktops	 <b>+ Ctrl + ←/→</b>

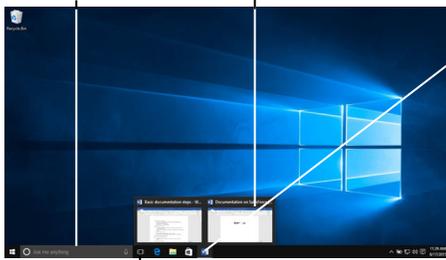
## Desktop

### Cortana:

Click to open Cortana to search for items.

### Window preview:

Point to the program icon on the taskbar. Click a preview thumbnail to view the window.



**Program icon:** Click to open the program. Rearrange icons by clicking and dragging.

**Show Desktop button:** Point or click here to make open windows invisible.

**Task View button:** Click to view all of the open windows in Task View.

**Notification area:** The Action Center, clock, and other system icons are located here.

- **To Peek at Open Windows:** Point to a program icon on the taskbar. Point at the resulting thumbnail preview to peek at the window.
- **To Minimize Other Windows:** Press **Windows + Home**. Or, click and shake a window's title bar quickly from side to side.
- **To Compare Windows Side by Side:** Click and drag a window's title bar to the right side of the screen, and select a window thumbnail for the left side of the screen. Or, press **Windows + →** or **Windows + ←**.
- **To Maximize an Open Window:** Click the window's Maximize window. Or, press **Windows + ↑**.
- **To Switch Between Apps:** Press **Alt + Tab** to move quickly between open programs and windows on the desktop. Or, press **Windows + Tab** to open Task View, and select a window thumbnail.
- **To Access Settings:** Click the Start button and select Settings from the Start menu.
- **To Pin a Program to the Taskbar:** Pin your favorite desktop apps to the taskbar so you can open them from within the desktop. Open the program you want to pin, right-click the program icon on the taskbar and select **Pin this program to taskbar**.

## Settings and Personalization

- **To Personalize your PC:** Click the Start button, select Settings from the Start menu, and click the Personalization category from the Settings app.
- **Change Background** – Choose built-in colors and pictures, or use your own. Select more than one picture to start a slide show.
- **Change Colors** – Change window color and transparency.
- **Change Lock screen:** Change the image that appears when the screen is locked.
- **Change Start:** Change what apps appear on the Start Menu.
- **Change Themes:** Change Windows's color scheme.

## File Explorer

### Address bar

Displays the location of the folder that is currently open

### Title bar

Click and drag to move the window

### Search box

Enter keywords to search the folder.

### Ribbon

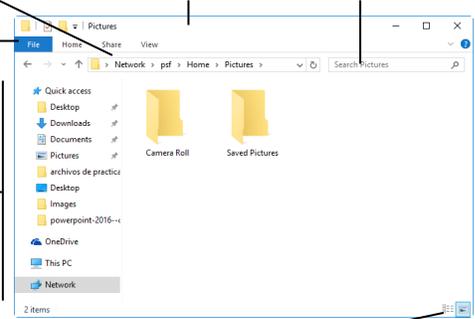
Displays buttons and menus for common commands

### Navigation Pane

Provides quick navigation to folders and files. Browse to favorite locations, libraries, OneDrive, This PC, and the network

### Display Settings

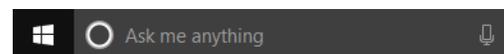
Choose how you want the content within the File Explorer to display



## Action Center

- **To Display Notifications:** Click the Notifications icon on the taskbar, or swipe in from the right side of the screen on a touchscreen, to open the Notification Center.
- **Collapse Actions Center:** Click Collapse to collapse the actions down to only the top row. The top row can be customized in the Settings app, so you can control which four actions are available when the list is collapsed.
- Available actions include:
  - **All Settings:** Opens the Settings app.
  - **Airplane Mode:** Toggling on will turn off all radios.
  - **Battery Saver:** Toggles battery saver mode, dimming the screen and applying other settings to save power.
  - **Bluetooth:** Toggles Bluetooth radio on/off.
  - **Brightness:** Adjusts your screen's brightness between 100%, 75% 50%, and 25%.
  - **Connect:** Connects to wireless devices (ie. Bluetooth).
  - **Location:** Toggles location services on/off.
  - **Note:** Opens a new note in MS OneNote.
  - **Quiet Hours:** A Do Not Disturb mode which blocks notifications from appearing.
  - **Rotation Lock:** Locks portrait or landscape views in tablet computers.
  - **Tablet Mode:** Toggles tablet mode, which makes the computer act more like Windows 8 and includes full-screen apps, bigger touch targets, the Start Screen replaces the Start Menu, etc.
  - **VPN:** Displays VPN settings in the Settings app.
  - **WiFi:** Toggles wifi on/off (not used to find a network).

## Cortana



- Cortana allows you to search for apps, files, or folders by typing in keywords, or saying the terms you're looking for.
- You can use Cortana's speech recognition by clicking the microphone button and saying the terms you're looking for.
- To open Cortana, click in the Cortana field to the right of the Start button.
- Cortana will display the results that she thinks are relevant.
- You can control your search results in Cortana's Notebook.

**Start screen**



**Keyboard shortcuts**

**Start Screen and Charms Bar**

Start screen/jump to previous app from Start screen	+
Charms Bar	+ <C>
Sharing pane	+ <H>
Settings pane	+ <I>
Devices pane	+ <K>
Jump to last app	+ <Tab>

**Basic Commands**

Search apps	+ <Q>
Search files	+ <F>
Search settings and control panels	+ <W>
Lock computer	+ <L>
Print	+ <P>
File Explorer	+ <E>
Display options for second screen	+ <P>
Move app one display to the left	+ <PgUp>
Move app one display to the right	+ <PgDn>
Snap app to left	+ <←>
Snap app to right	+ <→>
Power user menu	+ <X>
Windows Run	+ <R>

**Start Screen**

- **To Open the Start Screen:** Place your cursor in the lower left corner of the screen and click the Start screen icon. Or, press . Or, view the Charms Bar and click **Start**.
- **To View the Charms Bar:** Place your cursor in the upper right or lower right corner of the window. Or, press + <C>.
- **To Zoom Out from the Start Screen:** Point to the bottom right corner, and click the Summary View button. Or, press <Ctrl> + <->. Tiles are now easy to arrange and group.
- **To Resize App Tile on the Start Screen:** Right-click a tile and click **Smaller** to make the tile smaller. Choose **Larger** to make the tile larger.
- **To Rearrange Tiles:** Tiles are organized into columns of related apps. Drag a tile to a new location in a column, or drag it between columns to start a new column.
- **To Remove a Tile from the Start Screen:** Right-click the app and click **Unpin from Start**.
- **To Add a Tile to the Start Screen:** Right-click the app and select **Pin to Start** in the bottom bar.
- **To Stop Updating an App's Live Tile:** Right-click an app's tile and click **Turn live tile off**.
- **To Search for Files or Settings:** Point to the top right corner of the screen, click **Search**, and click either **Files** or **Settings**. Or, press + <F> for files; press + <Q> for settings.

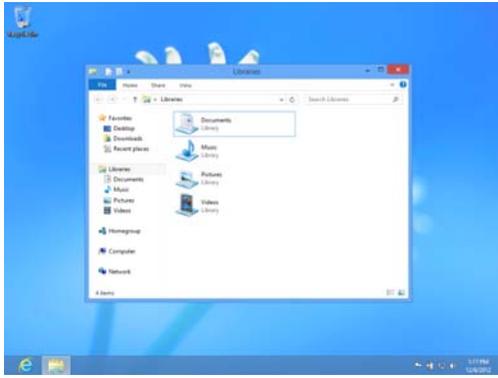
**Apps**

- **To Launch an App:** Find the app's tile on the Start screen, or search for the app, and click its icon.
- **To Search for an App:** On the Start screen, start typing the app's name. Or, point to the top right corner of the screen and click **Search**. Or, press + <Q> and click **Apps**.
- **To View All Installed Apps:** Right-click the Start screen and click **All apps** in the bottom bar. Or, press + <Q> and click **Apps**. Or, view the Charms bar, click **Search**, and click **Apps**.
- **To Close an App:** Point to the top of the screen to make the grabber handle appear. Click and drag all the way down the screen. Or, press <Alt> + <F4>.
- **To Jump to an Open App:** Place your cursor in the upper left corner of the screen and click the app icon that appears. Or, press + <Tab>. To view all open apps, move your cursor from the corner down the left edge, or press and hold down and press <Tab> to scroll through open apps.  
Note: Right-click an app and click **Close** to close it.
- **To View App Commands:** Right-click while inside the app. A horizontal bar with options for the app, such as tabs in Internet Explorer, appears.
- **To Install an App:** Install apps from the Windows Store, media such as DVDs, or download from the Internet.
- **To Uninstall an App:** Right-click the app and click **Uninstall** in the bottom bar.

**Desktop shortcuts**

Desktop	+ <D>
Maximize	+ <↑>
Minimize/Restore	+ <↓>
Switch between apps	<Alt> + <Tab>
Minimize all windows	+ <M>
Show/Hide Preview Pane	<Alt> + <P>

## Desktop



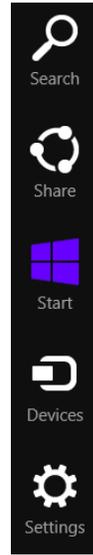
- The **Desktop** is familiar from previous versions of Windows. Desktop applications like Microsoft Office, File Explorer, and the Controls Panel run here. Use the same keystroke shortcuts, corner hotspots, and charms bar you use in Windows 8 to navigate the desktop.
- **To Use the Desktop:** From the Start screen, click the Desktop tile. Or, press **<Win> + <D>**.
- **To Peek at Open Windows:** Point to a program icon on the taskbar. Point at the resulting thumbnail preview to peek at the window.
- **To Minimize Other Windows:** Click and drag a window's title bar quickly from side to side. Or, press **<Win> + <Home>**.
- **To Compare Windows Side by Side:** Click and drag a window's title bar to the right side of the screen, and drag the other window to the left side of the screen. Or, press **<Win> + <←>** or **<Win> + <→>**.
- **To Maximize an Open Window:** Click and drag the window's title bar to the top of the screen or, drag the bottom border of the window down to the taskbar. Or, press **<Win> + <↑>**.
- **To Switch Between Apps:** Press **<Alt> + <Tab>** to move quickly between open programs and windows on the desktop.
- **To Access the Control Panel:** Open the Charms bar from the desktop. Click the **Settings charm** and click **Control Panel**.
- **To Pin a Program to the Taskbar:** Pin your favorite desktop apps to the taskbar so you can open them from within the desktop. Open the program you want to pin, right-click the program icon on the taskbar and select **Pin this program to taskbar**.

## Settings and Personalization

- **To Personalize your PC:** Open the **Settings charm**. Click **PC Settings**, and click the **Personalize** category. There are three basic ways to personalize your account:  
**Lock screen:** Change the image that appears when the screen is locked.  
**Start screen:** Change the color scheme and graphics of the Start screen.  
**Account picture:** Use a picture on file as your account picture.
- **To Change PC Settings:** Open the Computer window (click the **Start** button and select **Computer**). Right-click the disk you want to defragment and select **Properties** from the contextual menu. Click the **Tools** tab and click the **Defragment now** button.
- **To Change Settings of Apps that do not Run on the Desktop:** Open the app and open the **Settings charm**. App specific settings are displayed, such as changing preferences, finding help, and adding accounts.
- **To Sync your Settings:** When your settings are synced, you can log in to your account from another PC and have the same settings. Open the **Settings charm**. Click **PC Settings**, and click the **General** category. Scroll down to the "Refresh your PC without affecting your files" heading and click **Get started**.

## Charms Bar

Charms help you do the things you do most often. What you can do with charms changes, depending on if you're on the Start screen or using an app.



**Search:** Use the search charm to search for anything on your computer. Search within a specific app, or search the entire computer. For example, if the Mail app is open, you can search for a specific message. Or, if you open the charm from the Start screen, search your entire PC.

**Share:** Use the Share charm to share things with other people—such as photos, documents, or links-- without leaving the app.

**Start:** Click to jump to the Start screen. If the Start screen is already displayed, return to the last app you were using.

**Devices:** Go here to use any device that's connected to your computer. For example, to print a file on a printer, to import images from a camera, and to manage a wireless device.

**Settings:** Change settings, find help, and get info for your PC and apps here. Also find the most common PC settings: volume, brightness, notifications, power, network connection, and keyboard. Access settings at a deeper level for your computer under Change PC Settings, such as personalization, users, notifications, ease of access, privacy, and much more.

## Search

- Not sure where something is? Use the search charm. It can help you find the settings, files, and apps you want on your computer. It can also help you find specific settings and items within an app.
- **To Open Search:** Open the Charms bar and click **Search**. Enter the search term, and click Apps, Settings, or Files to view the search results for each category.
- **To Search Within an App:** Open the Charms bar and enter the search term in the Search box. Click an app in the Search pane to perform the search in an app, instead of in apps, settings, and files on the computer. For example, click the Bing app to perform the search in Bing.
- **To Open a Location in File Explorer:** Open the Search charm. With Apps selected, enter a drive in the search box (e.g. C: \ or \\server\share). A list of folders within that drive appears below the search box. Press the Down Arrow key to select a folder. Continue entering the file path, typing and selecting folders as needed. Press **<Enter>** to open the path in File Explorer.
- **To View Details for an Item in Search Results:** Point to the item. A screen tip with more details about the item is displayed.
- **To Get Help:** Getting help changes depending on where you are:  
**Desktop:** Open the **Search charm**, type **Help**, and click **Help and Support**.  
**Start screen:** Open the **Settings charm**, and click **Help**.  
**App:** Open the **Settings charm**, and click **Help**.

## Maintenance

- **To Refresh your PC:** Open the **Settings charm**. Click **PC Settings**, and click the **General** category. Scroll down to the "Refresh your PC without affecting your files" heading and click **Get started**.
- **To Shut Down your Computer:** By default, Windows 8 goes into sleep mode when a laptop is closed, or the power button is pressed on a tablet. To turn your PC completely off, close all desktop apps. Then open the **Settings charm**, click **Power** and select **Shut Down**.
- **Windows Defender** is included in Windows 8 by default. This free anti-virus program protects our computer from downloading viruses and other malware to your computer.

## Windows Explorer

## Keystroke shortcuts

**Toolbar**  
 Displays buttons and menus for common commands.

**Navigation Pane**  
 Provides quick navigation to folders and files. Browse to favorite locations, libraries, homegroups, Computer, and the network.

**Address bar**  
 Displays the location of the folder that is currently open.

**Title bar**  
 Click and drag to move the window.

**Search box**  
 Enter keywords to search the folder.

**Details pane**  
 Displays details about selected files.



- **To Search for a File or Program on the Computer:** Click the **Start** button, or press **<Windows>**, and type a keyword for the file or program. Search results are displayed in the menu.
- **To Search for a File in a Folder or Library:** Open the folder or library you want to search. Click the **Search box** in the upper right corner of the window and enter keyword(s) for the file you want to find.
- **To Add a Search Filter:** After entering keywords in the Search box, select a filter from the list that appears.
- **To Add a Folder to a Library:** Open the library and click the **locations** link. Click the **Add** button. Select the folder and click **Include folder**.
- **To Create a New Library:** Open Computer and select **Libraries** in the Navigation pane. Click the **New library** button on the toolbar. Enter a name for the library press **<Enter>**. Double-click the library and select the folders you want to include.

- **To Change How Items are Displayed:** Click the **View** button list arrow on the toolbar and select a view.
- **To Change Window Layout:** Click the **Organize** button on the toolbar, point to **Layout**, and select a layout option.
- **To Create a Folder:** Click the **New Folder** button on the toolbar. Type a name for the folder and press **<Enter>**.
- **To Use the Address Bar to Navigate:** Click a location on the Address bar to go to view it in the window. Click a location's list arrow to view and open subfolders within the location.
- **To Preview a File:** Click the **Preview Pane** button on the toolbar or press **<Alt> + <P>**. Select the file you want to preview.
- **To View a File or Folder's Properties:** Select the file or folder and view properties in the Details pane.

### General

- Start menu **<Windows>**
- My Computer **<Windows> + <E>**
- Create new folder **<Ctrl> + <Shift> + <N>**
- Zoom **<Windows> + <+>**
- Connect to projector **<Windows> + <P>**
- Flip 3D **<Windows> + <Tab>**

### Window management

- Peek at the desktop **<Windows> + <Space>**
- Show/Hide desktop **<Windows> + <D>**
- Minimize all windows **<Windows> + <M>**
- Minimize other windows **<Windows> + <Home>**
- Maximize **<Windows> + <↑>**
- Minimize/Restore **<Windows> + <↓>**
- Dock to left **<Windows> + <←>**
- Dock to right **<Windows> + <→>**
- Jump to left monitor **<Windows> + <Shift> + <←>**
- Jump to right monitor **<Windows> + <Shift> + <→>**
- Show/Hide Preview Pane **<Alt> + <P>**
- Bring all gadgets to the front **<Windows> + <G>**

### Taskbar

- Cycle through icons **<Windows> + <T>**
- Open new instance **<Shift> + click**
- Launch program **<Windows> + <1-9>** (# corresponds to pin order)

## Windows Taskbar



**Start button:**  
 Opens the Start menu.

**Program icon:** Click to open the program. Rearrange icons by clicking and dragging.

**Window preview:**  
 Point to the program icon on the taskbar. Click a preview thumbnail to view the window.

**Show Desktop button:**  
 Point or click here to make open windows invisible.

**Notification area:** The Action Center, clock, and other system icons are located here.

## Aero



Aero Peek makes open windows invisible so you can view the gadgets and icons on the desktop.

- **To See Through Windows with Aero Peek:** Point to the **Show Desktop** button on the right edge of the taskbar or press **<Win> + <Space>**.
- **To View Open Windows with Aero Peek:** Point to the program icon on the taskbar that contains the file or window you want to view. Click the thumbnail preview to view the window.
- **To Minimize Other Windows with Aero Shake:** Click and drag a window's title bar quickly from side to side. Or, press **<Win> + <Home>**.
- **To Compare Windows Side by Side with Aero Snap:** Click and drag a window's title bar to the right side of the screen, and drag the other window to the left side of the screen. Or, press **<Win> + <Left>** and **<Win> + <Right>**.
- **To Maximize an Open Window with Aero Snap:** Click and drag the window's title bar to the top of the screen or, drag the bottom border of the window down to the taskbar. Or, press **<Win> + <Up>**.
- **To Flip through Windows with Flip 3D:** Press **<Win> + <Tab>**; continue to hold down the **<Win>** key while pressing **<Tab>** to scroll through the open windows.

## Personalization

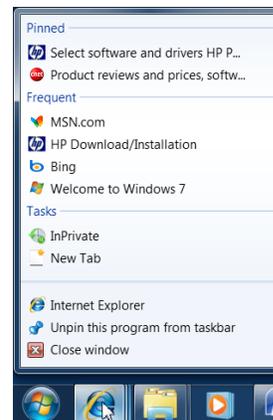
- **To Personalize Windows 7 Appearance and Sounds:** Right-click the desktop and select **Personalize**. The Personalization window appears. Click the appropriate links to personalize these settings:
  - **Themes** – Change menus, icons, backgrounds and sounds all at once.
  - **Desktop Background** – Choose built-in colors and pictures, or use your own. Select more than one picture to start a slide show.
  - **Window Color** – Change window color and transparency.
  - **Sounds** – Change which sounds play when you perform different tasks.
  - **Screen Savers** – Adjust what it displays and when it appears.
  - **Desktop Icons** – Add icons to the desktop, such as Computer and Network.
  - **Mouse Pointers** – Change how the pointer looks and acts, reverse buttons.

## Maintenance

- **To Defragment your Hard Disk:** Open the Computer window (click the **Start** button and select **Computer**). Right-click the disk you want to defragment and select **Properties** from the contextual menu. Click the **Tools** tab and click the **Defragment now** button.
- **To Use Disk Cleanup to Free Space on Your Hard Drive:** Open the Computer window (click the **Start** button and select **Computer**), right-click the hard disk, select **Properties** from the contextual menu and click the **Disk Cleanup** button.
- **To Uninstall a Program:** Click the **Start** button and select **Control Panel**. Click the **Uninstall a program** link under Programs. Select the program you wish to uninstall from your computer, and click the **Uninstall** button on the toolbar.

## Jump Lists

Items at the top of the list are pinned to the program's jump list.



The Frequent section displays files or pages that have been frequently used.

Right-click an icon on the taskbar...

...to view the jump list for the program.

- Jump Lists are quick shortcuts to files and commands that a program uses frequently. The items that appear in a jump list change according to the program selected. For example, Internet Explorer displays frequently visited pages, Microsoft Word displays frequently opened documents.
- **To View a Jump List:** Right-click an icon on the Windows 7 taskbar. Or, click the **list arrow** next to a program icon in the Start menu.
- **To Pin a Program to the Taskbar:** Open the program you want to pin, right-click the program icon on the taskbar and select **Pin this program to taskbar** from the jump list.
- **To Pin an Item to the Jump List:** View the program jump list. Right-click the item you want to pin and select **Pin to this list**. Or, point to an item on the jump list and click the **Pin to this list** button.
- **To Remove an Item from the Jump List:** View the program jump list. Right-click an item that appears in the jump list and select **Remove from this list** from the contextual menu.

## Gadgets

- **To Add Gadgets to the Desktop:** Right-click the desktop and select **Gadgets** from the contextual menu. Double-click the gadget you want to add to the desktop.
- **To View Gadgets:** Press **<Win> + <G>**. The gadgets on your desktop appear on top of the windows that are open.
- **To Remove a Gadget from the Desktop:** Point to a gadget and click the **Close** button that appears.
- **To Download New Gadgets:** Right-click the desktop and select **Gadgets** from the contextual menu. Click the **Get more gadgets online** link at the bottom of the window, click the Desktop gadgets tab, and click the **Download** button for the gadget you want to add.
- **To View a Gadget's Options:** Point at the gadget, then click the **Options** button to view and change settings for that gadget.

## HomeGroup

- **To Join a Homegroup:** Before you begin, make sure you have the homegroup password. Click the **Start** button and select **Control Panel**. Click the **Network and Internet** link. Click the **HomeGroup** link and click **Join Now**. Complete the wizard and enter the homegroup password as prompted.
- **To Create a Homegroup:** Click the **Start** button and select **Control Panel**. Click the **Network and Internet** link. Click the **HomeGroup** link and click **Create a homegroup**. Complete the wizard to create the homegroup.

# Acrobat: Find and Advanced Search tools

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*Caution: when scanned paper is turned into PDF format, it can be made searchable through a process called "OCR" (Optical Character Recognition). OCR will try and translate an image to text, but it can be inaccurate, especially when dealing with poorer quality images. When searching PDF files you might not get a complete set of results.*

## Find

- Go to the **Edit** menu and select **Find** or press Ctrl+F.
- Your cursor will move to the Find box on the toolbar.
- Enter text – each time you press the enter key, it will go to that text in the PDF file.

## Advanced Search

- Go to the **Edit** menu and select **Advanced Search** or press Shift+Ctrl+F.
- A search window will appear enabling you to look for search terms in multiple PDFs. For example, you can search across all PDFs in a specific location or all files.
- With **Standard** or **Pro**, you can save your search results to a PDF or CSV (spreadsheet) file.

## \*Recognize Text *(a.k.a. OCR or Optical Character Recognition)*

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- If a PDF is not searchable you can make it so by running the "Recognize Text" process.
- From the "Tools" pane select "Recognize Text". You can run the process on a single file, or multiple files.

## \*Bookmarks

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- A "bookmark" is a link with text in the "Bookmarks" panel. Each bookmark goes to a different view or page in the document, and allows one to jump to a destination in the PDF, to another document, or to a webpage. They can function as a table of contents.
- Bookmarks can also be used to create document breaks within a PDF. This is also called unitizing, and by bookmarking a PDF you can allow people to review pages on a document level in addition to a page level. We suggest that a bookmark with the bates number as the name of the bookmark be used to label each new document within the PDF file.

## \*Comments *(a.k.a. Annotations or Sticky Notes)*

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- Comments are notes and drawings that communicate ideas or provide feedback for the PDF files. You can type a text message using the Sticky Note tool, or you can use a drawing tool to add a line, circle, or other shape and then type a message in the associated pop-up note.
- Most comments include two parts: the icon, or markup, that appears on the page, and the text message that appears in a pop-up note when you click or double-click the icon or place the pointer over the icon.

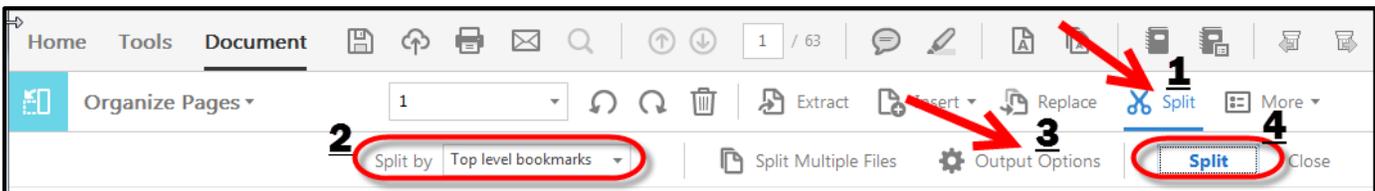
\* Not available in the free Acrobat Reader

## Acrobat Pro Document re-organization / unitization

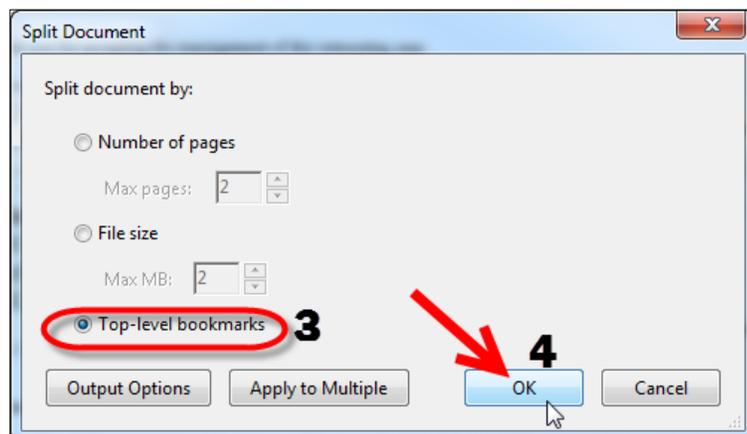
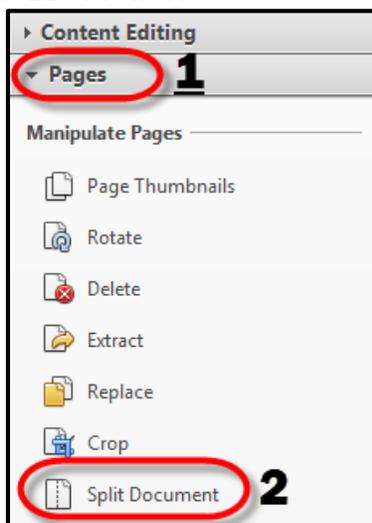
If your PDF file contains a number of documents, you may split the file into individual documents using this technique.

1. Create a bookmark for the beginning page of each new document in your file.
  - a. The bookmark names will become the new file names.
  - b. Give a unique name to each bookmark (so that the new file names will also be unique).
    - i. If the pages are bates numbered, consider using the bates number as a prefix for the bookmark name.
    - ii. Do not use any extraneous punctuation marks in the bookmark names as this may cause a conflict during the splitting process.  
(no “?!\\“&’^%” characters, dashes “-” and underscores “\_” are okay).
2. Set up the split:
  - a. Acrobat DC Pro: From the “Tools” tab or side menu...choose “Organize Pages”, then select “Split”.
  - b. Acrobat 11 or lower: Select “Split” from the “pages” group in “Tools”.
  - c. Choose Split by “Top Level Bookmarks” from the drop down menu, then click on the “Output Options” button.
  - d. Choose “Use bookmark names for file names” and click “OK”.
3. Run the split:
  - a. Acrobat DC: click the “Split” button next to “Output Options”.
  - b. Acrobat 11 or lower: Click “OK” in the “Split Document” dialog window.

### Acrobat DC:



### Acrobat 11 or lower:





# Adobe Acrobat DC shortcuts frequently-used on Windows

## FILE MENU

Open ..... Ctrl+O  
Create PDF from File ..... Ctrl+N  
Create PDF from Web Page ..... Shift+Ctrl+O  
Save ..... Ctrl+S  
Save As ..... Shift+Ctrl+S  
Close ..... Ctrl+W  
Close All ..... Alt+Ctrl+W  
Properties ..... Ctrl+D  
Print ..... Ctrl+P  
Exit ..... Ctrl+Q

## EDIT MENU

Undo ..... Ctrl+Z  
Redo ..... Shift+Ctrl+Z  
Cut, Copy, Paste ..... Ctrl+X, C, V  
Select All ..... Ctrl+A  
Deselect All ..... Shift+Ctrl+A  
Check Spelling ..... F7  
Find ..... Ctrl+F  
Advanced Search ..... Shift+Ctrl+F  
Preferences ..... Ctrl+, or K

## TOOLS PANE

Type Tool ..... T  
Insert Blank Page ..... Shift+Ctrl+Q  
Preflight ..... Shift+Ctrl+X  
Edit Forms ..... Shift+Ctrl+7

## VIEW MENU

Rotate View ↻ or ↺ ..... Sh+Ctrl++ or -  
First/Last Page ..... Home or End  
Previous/Next Page ..... ⬅ or ➡  
Page ..... Shift+Ctrl+N  
Previous/Next View ..... Alt+⬅ or ➡  
Automatically Scroll ..... Shift+Ctrl+H  
Zoom To ..... Ctrl+Y  
Actual Size ..... Ctrl+1  
Zoom to Page Level ..... Ctrl+0  
Fit Width ..... Ctrl+2  
Fit Visible ..... Ctrl+3  
Reflow ..... Ctrl+4  
Navigation Pane ..... F4  
Properties Bar ..... Ctrl+E  
Toolbars ..... F8  
Menu Bar ..... F9  
Grid ..... Ctrl+U  
Snap to Grid ..... Shift+Ctrl+U  
Rulers ..... Ctrl+R  
Line Weight ..... Ctrl+5  
Read Mode ..... Ctrl+H  
Full Screen Mode ..... Ctrl+L  
Activate Read Out Loud ..... Shift+Ctrl+Y  
Read This Page Only ..... Shift+Ctrl+V  
Stop (Reading) ..... Shift+Ctrl+E

## NAVIGATION

Return to Hand or Select Tool ..... Esc  
Next Search Result ..... F3  
Next Open Document ..... Ctrl+F6  
Previous Open Document ..... Shift+Ctrl+F6

## NAVIGATION PANELS

Insert Pages from File ..... Shift+Ctrl+I  
Insert Blank Pages ..... Shift+Ctrl+Q  
Delete Pages ..... Shift+Ctrl+D  
Crop Pages ..... Shift+Ctrl+T  
Rotate Pages ..... Shift+Ctrl+R  
New Bookmark ..... Ctrl+B

## WINDOW MENU

Cascade ..... Shift+Ctrl+J  
Tile Horizontally ..... Shift+Ctrl+K  
Tile Vertically ..... Shift+Ctrl+L

## COMMENT PANE

Add Sticky Note ..... Ctrl+6  
Highlight Text ..... U  
Add Stamp ..... J  
Next Comment ..... Tab  
Previous Comment ..... Shift+Tab

## EFFICIENT ZOOM & PAN

Drag Mouse to Zoom ..... Ctrl+Spacebar  
Pan the View ..... Spacebar  
Zoom In/Out ..... Ctrl + or -



# Adobe Acrobat DC shortcuts frequently-used on Mac



## ACROBAT MENU

Quit..... Cmd+Q  
Preferences..... Cmd+, or K

## FILE MENU

Open..... Cmd+O  
Create PDF from File..... Cmd+N  
Create PDF from Web Page..... Shift+Cmd+O  
Close..... Cmd+W  
Save..... Cmd+S  
Save As..... Shift+Cmd+S  
Properties..... Cmd+D  
Print..... Cmd+P

## EDIT MENU

Undo..... Cmd+Z  
Redo..... Shift+Cmd+Z  
Cut, Copy, Paste..... Cmd+X, C, V  
Select All..... Cmd+A  
Deselect All..... Shift+Cmd+A  
Check Spelling..... F7  
Find..... Cmd+F  
Advanced Search..... Shift+Cmd+F  
Preflight..... Shift+Cmd+X

## TOOLS PANE

Type Tool..... T  
Insert Blank Page..... Shift+Cmd+Q  
Edit Forms..... Shift+Cmd+7

## VIEW MENU

Rotate View or ..... Sh+Cmd++ or -  
First/Last Page..... Home or End  
Previous/Next Page..... or   
Page..... Shift+Cmd+N  
Previous/Next View..... Cmd+ or   
Automatically Scroll..... Shift+Cmd+H  
Zoom To..... Cmd+Y  
Actual Size..... Cmd+1  
Zoom to Page Level..... Cmd+0  
Fit Width..... Cmd+2  
Fit Visible..... Cmd+3  
Reflow..... Cmd+4  
Navigation Pane..... F4  
Properties Bar..... Cmd+E  
Toolbars..... F8  
Menu Bar..... Shift+Cmd+M  
Grid..... Cmd+U  
Snap to Grid..... Shift+Cmd+U  
Rulers..... Cmd+R  
Line Weight..... Cmd+5  
Read Mode..... Shift+Cmd+H  
Full Screen Mode..... Cmd+L  
Activate Read Out Loud..... Shift+Cmd+Y  
Read This Page Only..... Shift+Cmd+V  
Stop (Reading)..... Shift+Cmd+E

## NAVIGATION

Return to Hand or Select Tool..... Esc  
Next Search Result..... F3  
Next Open Document..... Cmd+F6  
Previous Open Document..... Shift+Cmd+F6

## NAVIGATION PANELS

Insert Pages from File..... Shift+Cmd+I  
Insert Blank Pages..... Shift+Cmd+Q  
Delete Pages..... Shift+Cmd+D  
Crop Pages..... Shift+Cmd+T  
Rotate Pages..... Shift+Cmd+R  
New Bookmark..... Cmd+B

## WINDOW MENU

Minimize..... Cmd+M  
Cascade..... Shift+Cmd+J  
Tile Horizontally..... Shift+Cmd+K  
Tile Vertically..... Shift+Cmd+L

## COMMENT PANE

Add Sticky Note..... Cmd+6  
Highlight Text..... U  
Next Comment..... Tab  
Previous Comment..... Shift+Tab

## EFFICIENT ZOOM & PAN

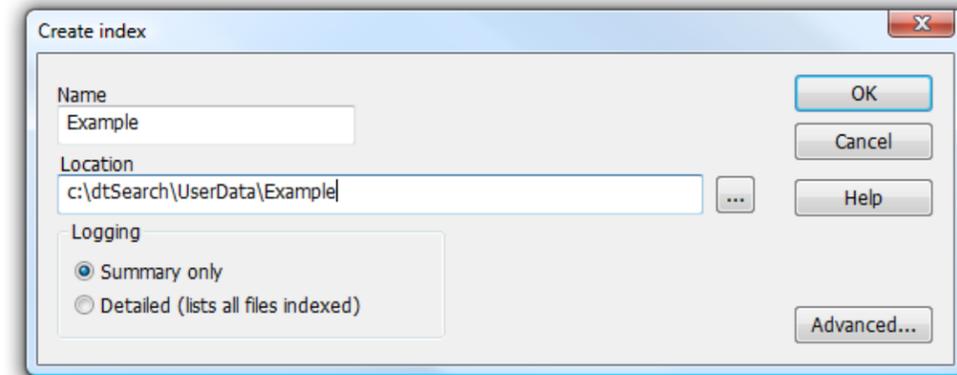
Drag Mouse to Zoom..... Cmd+Spacebar  
Pan the view..... Spacebar  
Zoom In/Out..... Cmd + or -

# dtSearch Quick Start

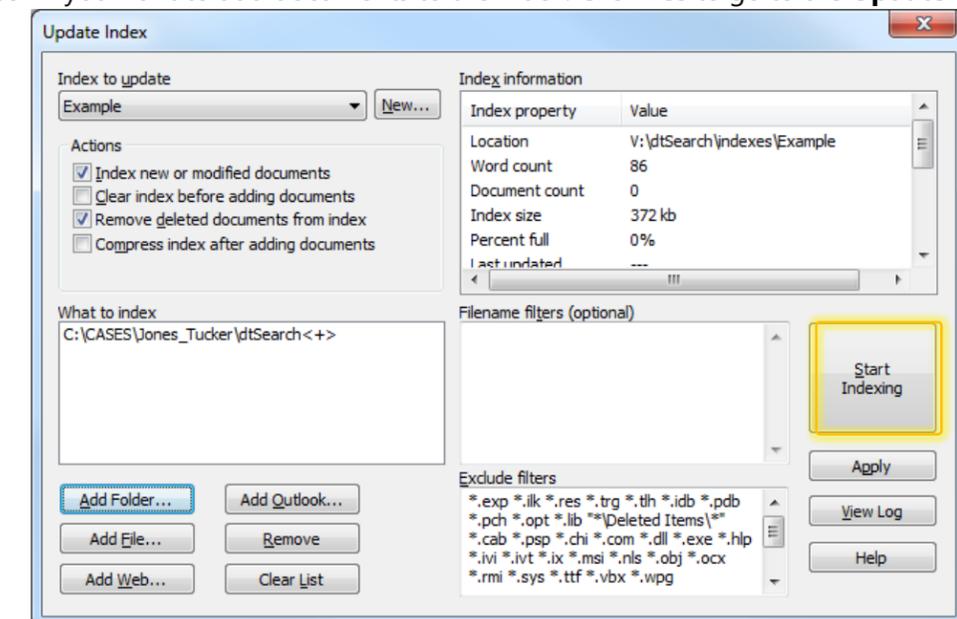
To get started with dtSearch, the first step is to build an index of your documents. Once the index is built, dtSearch can use it to search your documents quickly.

## Indexing Documents

1. Choose **Create Index** from the Index menu.
2. In the **Create index** dialog box, enter a name for the index and click OK.



3. dtSearch will ask if you want to add documents to the index. Click **Yes** to go to the **Update Index** dialog box.



4. Click **Add folder...** to add a folder to the list of folders to index.
5. Click **Start Indexing** to begin adding documents to your index.  
*dtSearch automatically recognizes many popular file types. For a complete list of the file formats that dtSearch supports, see the dtSearch website.*

## Updating an Index

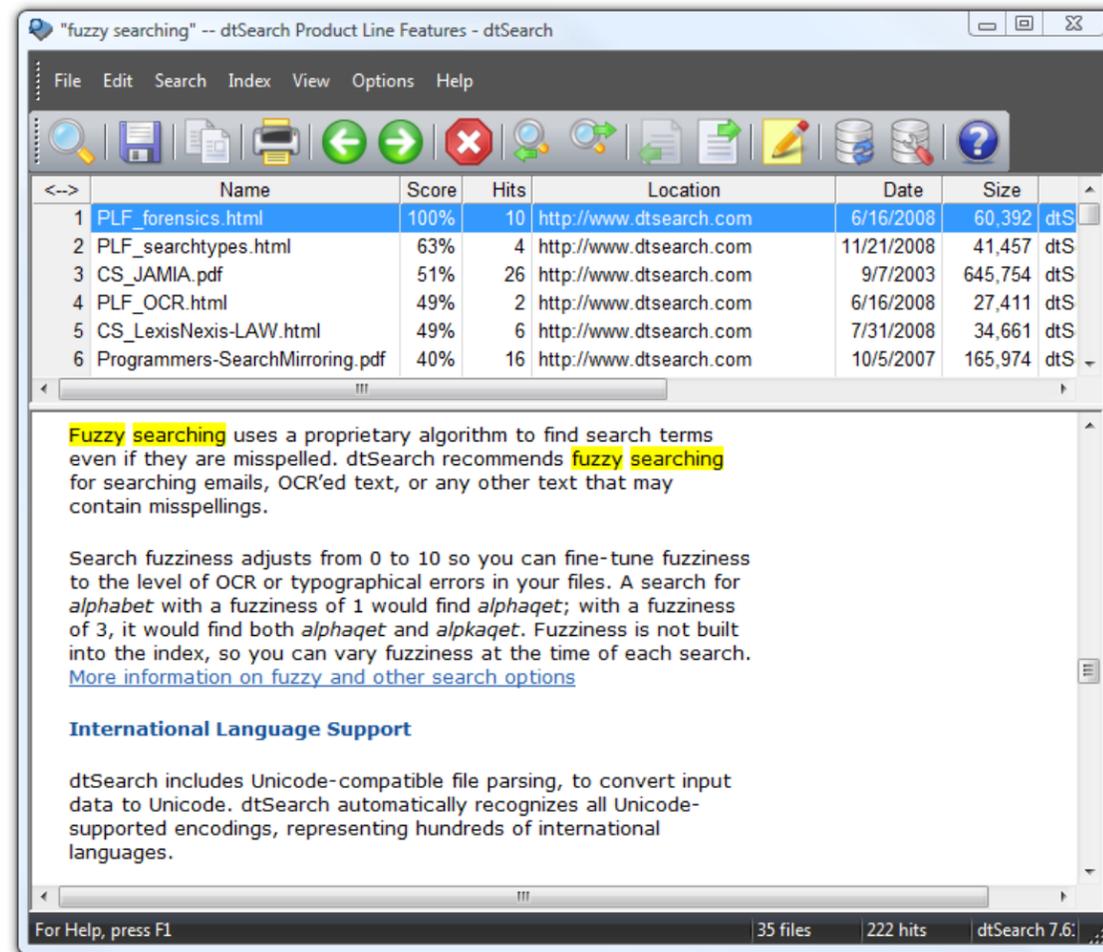
If you edit or add to your documents, you will need to update your index to reflect the changes.

To update your index, choose **Update Index** in the Index menu (or press Ctrl-U). Check the **Index new or modified documents** box and the **Remove deleted documents** box, and then click the **Start Indexing** button.

To schedule automatic index updates, click **Index > Index Manager** and click the **Schedule Updates**.

## Viewing Search Results

After a search, dtSearch will display the results of the search. The top half of the dtSearch window will list all of the files retrieved in the search, and the lower half will show the first document in the list, with hits highlighted in yellow.



1. To select a document to view from the search results list, double-click on it.
2. To jump to the next hit in a document window, click **Next Hit** on the button bar (or press SPACEBAR). Press Ctrl-SPACEBAR, or click the **Next Doc** button, to go to the next document.
3. To change the way search results are sorted, click on one of the column headers (**Name**, **Score**, **Location**, **Date**, etc.).
4. Click the **Launch** button to open a document in the application associated with it. For example, a Word document would be launched in Microsoft Word.

To view or reuse a prior search request, click the **Search History** tab in the **Search** dialog box.

## Create a Quick Summary of Your Search Results

An easy way to see all hits in all retrieved documents is to build a search report. A search report shows all hits along with the amount of context that you request.

1. Choose **Search Report** from the Search menu. The **Generate Search Report** dialog box will appear.
2. Enter the number of words (or paragraphs) of context that you want dtSearch to include in your search report and click OK to generate the report.
3. The search report will open in your word processor so you can edit or print it

## Searching using the Index

1. Click the **Search** button on the dtSearch button bar, or press Ctrl-S, to open the **Search** dialog box.

The screenshot shows the dtSearch dialog box with the following components and callouts:

- Indexed word list:** A list of words and their frequencies from the selected index. Callout: "The top left of the dialog box shows a list of the words in the currently selected index. If more than one index is selected for searching, you can select the index to display in the word list by clicking the down arrow above the word list."
- Indexes to search:** A list of available indexes. Callout: "The top right of the dialog box shows a list of the indexes you have created; select one or more to search"
- Search Request:** A text field containing the search terms. Callout: "The words and phrases being searched"
- Search features:** Checkboxes for Stemming, Phonic, Fuzzy searching, Synonym searching, Synonyms, Related words, and User Synonyms.
- Search for:** Radio buttons for Any words, All words, and Boolean search (selected).
- Sort by relevance:** A dropdown menu.
- Search button:** A yellow button labeled "Search".
- Return best 5000 matching files:** A text field at the bottom.

2. Enter a search under **Search Request**.
3. Select any items under **Search features** (such as fuzzy searching) that you want to use.
4. Click **Search** to begin the search.

## Search Types

**Any words:** use quotation marks around phrases, put + (plus) in front of any word or phrase that is required, and - (minus) in front of a word or phrase to exclude it. Examples:

```
banana pear "apple pie"
"apple pie" -salad +"ice cream"
```

**All words:** like an "any words" search except that all of the words in the search request must be present for a document to be retrieved.

**Boolean search:** a group of words, phrases, or macros linked by connectors such as AND and OR that indicate the relationship between them. Examples:

Search Request	Meaning
apple and pear	both words must be present
apple or pear	either word can be present
apple w/5 pear	apple must occur within 5 words of pear
apple not w/5 pear	apple must occur, but not within 5 words of pear
apple and not pear	only apple must be present
name contains smith	the field <i>name</i> must contain smith

If you use more than one connector, use parentheses to indicate precisely what you want to search for. For example, *apple and pear or orange juice* could mean *(apple and pear) or orange*, or it could mean *apple and (pear or orange)*.

You can use variable term weighting in a search request to weigh some words more heavily than others in ranking search results. Example: *apple:5 and pear:3*

## Search Features

**Stemming** searches other grammatical forms of the words in your search request. For example, with stemming enabled a search for *applies* would also find *apply*, *applying* or *applied*.

**Phonic search** finds words that sound similar to words in your request, like *Smith* and *Smythe*.

**Fuzzy search** sifts through scanning and typographical errors. Fuzziness adjusts from 1 to 10 depending on the degree of misspellings. A search for *alphabet* with a fuzziness of 1 would find *alpaqet*; with a fuzziness of 4, it would find both *alpaqet* and *alkaqet*.

**Synonym searching** tells dtSearch to use a thesaurus to automatically expand a search to include synonyms or related concepts, including three optional levels. (Click **Browse thesaurus** to browse the entire thesaurus.)

To see how stemming, phonic searching, fuzzy searching or wildcards will affect your search, click the **Browse Words** button.

To browse the thesaurus used for synonym searching, click the **Browse Thesaurus** button.

Click the **Fields** button for a list of searchable fields, if you want to limit your search to a particular field.

## More Search Options

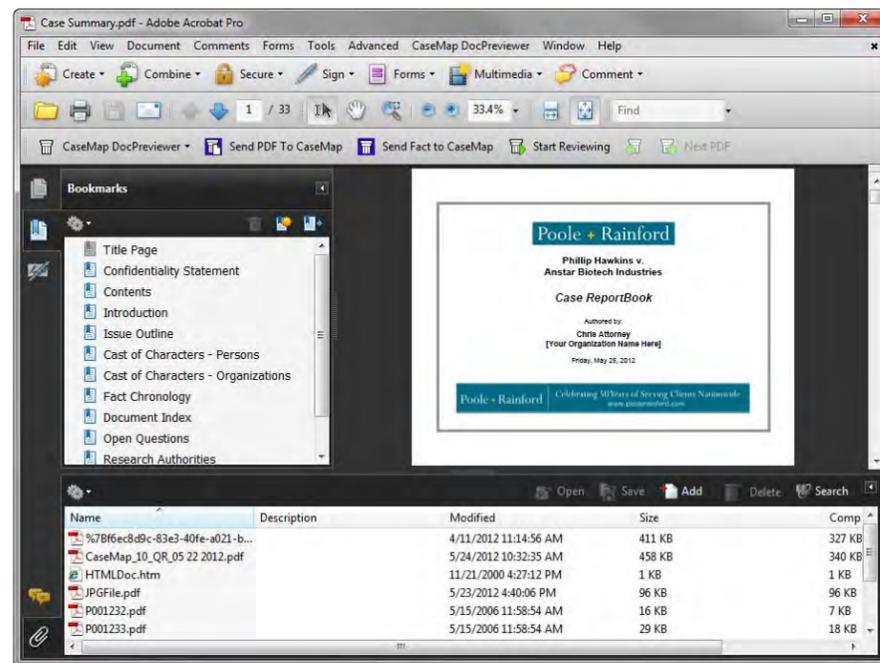
To search without an index, or to search by filename, date, or size, click the **More search options** tab.

## Reports and Reportbooks

### Creating and Printing Reports

Case spreadsheets are the raw material that make up your CaseMap reports – many of which are required by the court. With a few mouse clicks, you can create professional reports instantly in Adobe® Acrobat, Microsoft® Word, or just printing them on paper. Using the Facts spreadsheet you can easily turn your fact chronology into Motions for Summary Judgment and produce the list of facts that you're willing to stipulate for pre-trial motions. With CaseMap reports, What-You-See-is-What-You-Get, so what is displayed in your spreadsheet view is the same as what you see in your report. Make sure you have filtered your spreadsheet content and sorted records to create the view you want before printing your reports.

CaseMap also offers four pre-built reports that you can easily produce using a wizard to guide you through the steps. Pre-built reports include the following options: Privilege Log, Summary Judgment, By Issue Report, By Object Report.



### Printing ReportBooks

ReportBooks are living documents that can be used throughout the life of the trial that are essential for ensuring that clients and case staff stay abreast of case developments and can readily collaborate in the case analysis process.

A ReportBook is a compilation of CaseMap reports packaged with optional elements such as a cover page, table of contents, confidentiality statement, introduction, and report-specific title pages. The layout is similar to the standard report generated when you print one of CaseMap's spreadsheet views. CaseMap offers eight pre-built ReportBooks for you to choose from, including a complete Case Summary (as shown above) and an overview of What's New in the Last 14 days.

ReportBooks are printed to a PDF file. You can choose whether to embed linked files in your ReportBook so that others can click on a document or file and view it in its native application.

#### Litigators use ReportBooks in a variety of ways:

- Produce a ReportBook shortly after client intake to show clients that you have captured their concerns.
- Compile a ReportBook to present your case to investigators, arbitrators, clients, and other key decision makers.
- Save your ReportBooks in PDF and link them to correspondence.

#### To print to PDF:

- 1 On the **Reports** menu, click **Print** or **PDF Current View**. You can also click the **Print** button on the CaseMap toolbar.
- 2 On the submenu, click **Print to PDF** or **Print to PDF Email**. The Print to PDF Email option includes the PDF report in an Outlook email that you can send to case staff or clients.

#### To print to Word, Excel, TimeMap, NoteMap, HTML, or Corel WordPerfect:

- 1 On the **Reports** menu, click **Send Current View To**.
- 2 On the submenu, click on the print option you want.

Some options allow you to select either a Grid or Record View. Try printing both to see which view you prefer.

#### To print a CaseMap pre-built report:

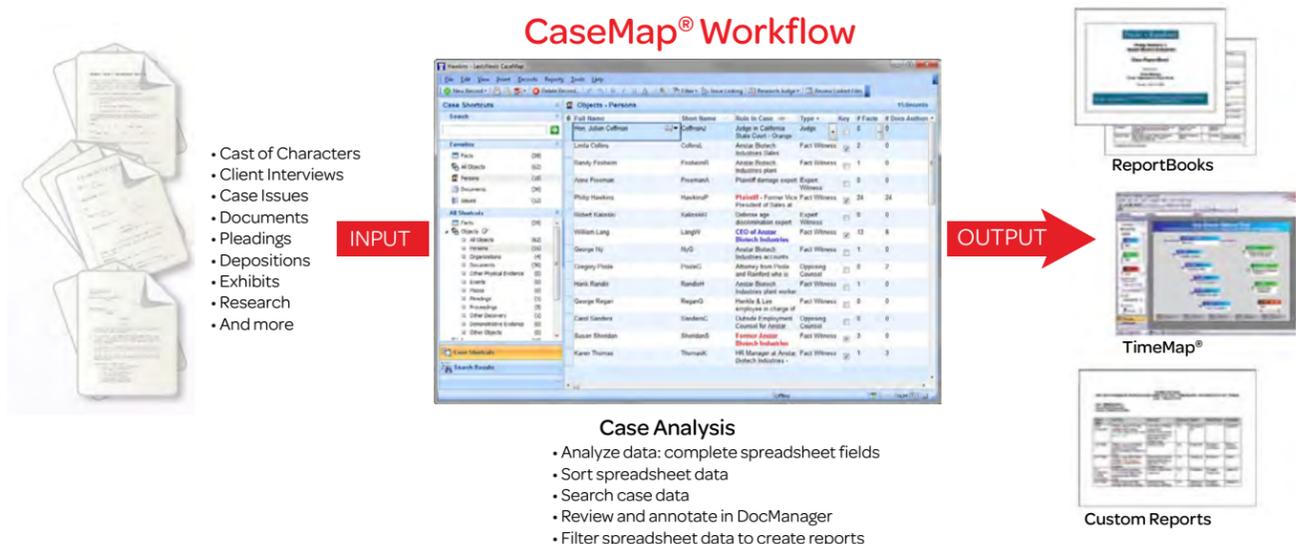
- 1 On the **Reports** menu, click the pre-built report you want to print: **Privilege Log**, **Summary Judgment**, **By Issue Report**, **By Object Report**.
- 2 When the report wizard launches, follow the steps in each box.
- 3 When you complete the wizard and the report displays, you can save it as a Word file to the network folder where you store reports.

#### To print and view a ReportBook:

- 1 On the **Reports** menu, click **ReportBooks**.
- 2 On the submenu, click the ReportBook you want to print.
- 3 On the print option submenu, click **Print to PDF** or **Print to PDF Email**.
- 4 In the **Save As PDF** dialog box, navigate to the network folder where you save reports, and then click **Save**.
- 5 In the message box, click **Yes** or **No** to embed linked files. If you click **Yes**, select which files you want to include in the ReportBook, and then click **OK**.
- 6 In the message box, click **Yes** to view the ReportBook.
- 7 In the **Bookmarks** pane, click on a bookmark link to view that section of the report.
- 8 In the ReportBook PDF file, click the **paperclip** icon in the lower left corner to display embedded linked files.
- 9 Double-click on a linked file to view it in its native application.

## CaseMap® Quick Reference

## Litigation Services



## Creating and Setting Up a Case

### 1. Creating a Case

Before working in CaseMap, you first need to create a case file to store information regarding the matter.

#### To create a new case:

1. On the **File** menu, click **New**.
2. Follow steps in the wizard to set up case information.
  - The time zone should reflect the primary location where your case and most facts and events occur.
  - Add case users later once the case is created and any custom fields or views are added.
  - Save the case to a network folder so others can access it.
3. Click **Finish** to create the new case file and launch the new **Case Jumpstart Wizard**.

### 2. Creating a Cast of Characters

CaseMap's objects spreadsheets are used to organize your list of "nouns" and Cast of Characters regarding the case, including persons, places, events, documents, evidence, proceedings, and pleadings.

#### Short Names:

When names are entered, CaseMap automatically creates short names - unique names for each object entered in a case. Short names are what make linking case data possible. When a short name is identified, CaseMap automatically links the object to case information: facts, issues, questions, and research. This feature is what allows you to search and view data in various ways so you can quickly locate essential information and create reports that shape and support your case strategy. For more information and tips on short names, see the **CaseMap Answer Center**.

#### To enter a basic Cast of Characters:

1. In the **Case Jumpstart Wizard**, click on the appropriate link to type in your character name. The wizard provides pages for Litigants, Judges, Opposing Counsel, Witnesses, Other People, and Other Organizations.
2. When you're done, click **Finish**. The **All Objects** spreadsheet displays so you can review your Cast of Characters. Notice how each object has a short name created for it.
3. In the **Case Shortcuts** pane, click the **All Shortcuts** bar to view the Cast of Characters organized by sub-object spreadsheets.

### 3. Entering Issues

When you first create your case, start outlining your issues in the Issues spreadsheet so you can quickly develop a hierarchy of claims, counter-claims, and any other known arguments.

The Issues spreadsheet can hold as many levels or sub-issues as you want and is automatically numbered (1, 1.1, 1.1.1) to indicate main issues and sub-level items for a case.

#### To enter issues:

1. In the **Case Shortcuts** pane under Favorites, click on **Issues**.
2. In the **Full Name** field, type in an issue.  
CaseMap automatically creates a short name for the issue to link issues to fact records and other case data.
3. Click the **New Record** button and then click **Issues** or press the **Insert** key to enter in a new issue.
4. To create a sub-level issue, click the arrow pointing to the right. CaseMap automatically saves each record as you move to a new field or record.

## Getting Data into CaseMap

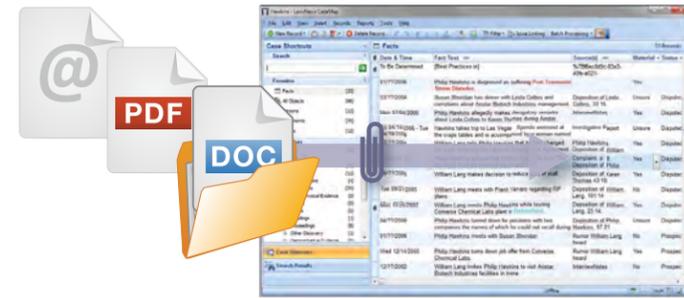
CaseMap offers several ways to get case data into your case file.

### There are three main ways to get data into CaseMap:

- Manually entering data into spreadsheets
- Bulk importing data using the Import Linked Files Wizard
- Sending facts and data from other programs (like Microsoft® Word, Microsoft® Outlook, Concordance®, TextMap®, and Adobe® Acrobat).

### A. Manually Entering Data

As you gather new case information, you can manually create a new record on any spreadsheet to update the case. To create new record, press the Insert key or click the New Record button on the CaseMap toolbar. Records are saved automatically as you navigate from record to record. To re-sort the spreadsheet, click Refresh Table on the Records menu.



### B. Importing Documents and Files into a Case

The Import Linked Files Wizard guides you through importing one or more documents/files into your case. The wizard will create a new record for each document you select to import. After the import, CaseMap indexes all new file content. You can begin searching the updated case data as soon as the index process completes.

#### To bulk import documents:

- 1 On the **File** menu, click **Import** and then click **Linked Files from a Folder**.
- 2 In the **Import Linked Files Wizard**, click **Next**.
- 3 In the **Select Files to Import** dialog box, click one of the import options: **Add Files** or **Add Folder**.
- 4 In the **Select Files to Import** dialog box, navigate to the folder where the files are saved, and select the file or folder to import, and then click **Open**. The files now display in the Selected files box.
- 5 After reviewing the files, click **Next**.
- 6 In the **Spreadsheet** drop-down list, click the spreadsheet for which you want to import the files, and then click **Next**.
- 7 In the **Ready to Import** dialog box, review the files and spreadsheet you selected for the import.
- 8 Click **Next** to initiate the import process.
- 9 In the **Completing the Import Linked Files Wizard** dialog box, review the number of files imported, then click **Finish**. The new records display in the selected spreadsheet.
- 10 In the **Completing the Import Linked Files Wizard** dialog box, review the number of files imported, then click **Finish**. The new records display in the selected spreadsheet.
- 11 In the **Case Shortcuts** pane, click on the spreadsheet. A paperclip icon displays next to each record to indicate that a linked file is attached.
- 12 Click on the **paperclip** icon to view the file in its native application or in the DocManager viewer.

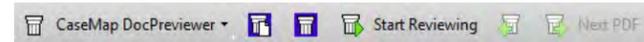
### C. Using the Send to CaseMap Tool

You can easily send fact text or documents directly to your case from other programs. While building the chronology with facts linked to documents, you can enter fact details, link to case elements by using short names and issues, and mark the status of the new fact.

Steps for sending facts or documents are nearly identical for each product. For complete step-by-step instructions for all supported products, see the **CaseMap Answer Center**.

#### To send a document from Adobe Acrobat or Reader:

- 1 With your PDF file open, right-click in the document and click **Send PDF to CaseMap**.
- 2 In the **Send to CaseMap** dialog box, select **Document** in the Object Type list.



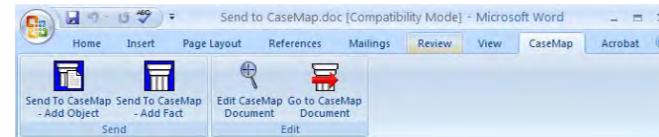
- 3 Type in the document name or edit the Full Name field, then click **Save**.
- 4 In the **Send to CaseMap** dialog box, click **Yes** to view the new document record in CaseMap.

**Note:** To send a fact, click the Send Fact to CaseMap in the PDF file.

#### To send facts and files from Word:

Send to CaseMap features display on a CaseMap ribbon within Word. The add-in is optional during CaseMap v10 installation.

- 1 Open the CaseMap case that you want to import data into from Word.
- 2 In the Word document, highlight the information you want to send, then click the **Send to CaseMap - Add Fact** button.



- 3 When the Send to CaseMap utility launches, select the spreadsheet you want and type in the document name, then click **OK**.
- 4 In the **Send to CaseMap - New Fact** box, select **Fact Text** in the Append Text Selection to field so that the excerpt displays in the Facts spreadsheet.

**Note:** The text selected displays in the Text Selection field and is enclosed in brackets. Do not delete the brackets. Removing them prevents CaseMap's recognition of short names and designate actual document text for the import.

- 5 In the **Favorites Fields** area, enter in additional fact record details like the date & time.
- 6 Click the **Issue Linker** bar to link the record to an issue.
- 7 Click **OK** to initiate the import process.
- 8 In the message prompt, click **Yes** to view the new fact record in the Facts spreadsheet.
- 9 Click in the **Fact Text** field to view the highlighted text you sent from the Word document.
- 10 Click on the **paperclip** icon for the fact record to view the linked file path and open the file in Word.
- 11 Scroll to the right and notice that the Source(s) field displays the linked element to the Word document and that the Linked Issue field displays any issues added for this record.
- 12 Click on the **Documents** spreadsheet to view the record created for the linked Word file. If you only want to send the Word document, click the **Send to CaseMap - Add Object** button.

## Case Analysis

Analyzing case data tells you what you already know and points the way to important information that you may need to know more about. Searching, sorting, tagging, and filtering case information from various angles may offer insights not otherwise noticed.

### A. Analyzing Spreadsheet Records

After getting data into Casemap, you'll want to analyze spreadsheet records and complete information in each field. For example, on the Facts spreadsheet, you'll want to mark which facts are relevant (Material field) and whether the facts are disputed (Status field).

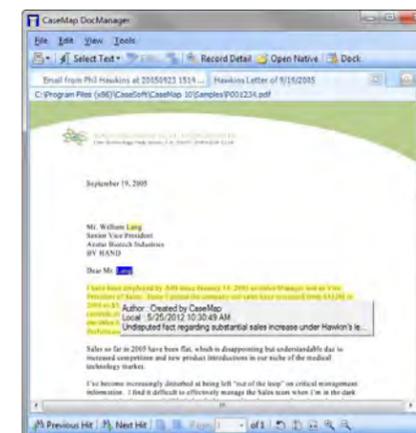


#### The Search Results navigation pane has four parts:

- 1 **Search field** — Allows you to type in full-text search terms.
- 2 **Narrow Results panel** — Allows you to view search hits found in spreadsheet fields, linked file text, or annotation note text. The number of search hits found displays to the right of the results.
- 3 **Results panel** — Displays all spreadsheets that contain records or linked files with search hits. The number of search hits found displays to the right of the spreadsheet name.
- 4 **Resources panel** — Provides access to three search results reports.

### E. Viewing Documents and Images in DocManager

Content analysis can be done in CaseMap's DocManager near native image viewer. DocManager 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. Annotation colors can be changed by each user, but only one color is used for printing. When a search is run, search hits are highlighted in DocManager allowing you to review content and navigate between search hits. Current search hits are highlighted in blue. All other search hits are highlighted in yellow. You can then view and print the Linked File Text Hits and Review Linked File Hits reports. You can batch print linked document files with or without Bates stamps and choose whether to include annotations and notes in the printed output.



#### To view a document or image file:

In a spreadsheet, click on the paperclip icon  for the linked file you want to view. To view multiple documents at one time, click the Pin icon in the upper right corner to this position. 

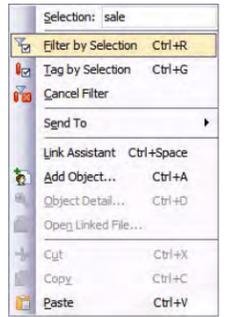
#### To navigate search hits:

Click the Previous Hit and Next Hit buttons in the lower left corner of DocManager. You can also click on or type a number in the Page list to jump to that page.

#### To annotate documents or images:

1. Open a linked file in DocManager and click the **Annotation mode** button.
2. Click **Annotate Text**. You can also click the **Tools** menu and then click the first menu item on the shortcut menu, and click **Annotate Text**.
3. Drag your mouse pointer over the text you want to annotate to open the **New Annotation** dialog box. The text you selected now displays in the Document Text box.
4. In the **Note** tab, type in information you want and then click **OK**.

**Tip:** If the selected text is worthy of a new fact record, click the Create New fact button to add it to the Facts spreadsheet.



### C. Filtering Spreadsheet Records

Filtering allows you to cull data for reports or save filters to rerun later when additional information is added to the case. Records that meet the criterion of your filter remain in view on the current spreadsheet; while other records are temporarily hidden from view. You can filter by key words, field status setting, or create multi-level filters (key word + field status). You can also run pre-built filters from the Records menu, by clicking Filters and selecting an option from the submenu. The filter menu options change depending on the spreadsheet you are viewing.

### D. Searching Case Data

CaseMap allows you to quickly search case data because of the comprehensive index created during the import process. You can search and locate all instances or "hits" of your search terms in spreadsheet records, linked files, and annotation notes.

Search terms can be more than one word. They can also be numbers, text phrases, or a combined use of terms and search operators. To run a previous search or search by selected spreadsheets, click the Records menu and then click Full Text Search.

After a search is run, search results display in two areas in CaseMap: the Search Results pane and the spreadsheets pane. Print the Search ReportBook to create a report of each spreadsheet record and all linked files located based on your search query.