CaseMap 12.1 Release Notes

Enhancements

SmartAssist

SmartAssist aids in performing various tasks in CaseMap by providing you with keyword search capabilities in locating user-driven functions.

Import Email attachments as separate objects

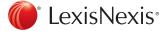
When using the Microsoft® Outlook plug-in to send an email to CaseMap, now you can import attachments as separate objects. Additional enhancements/capabilities include:

- Bulk send emails to CaseMap You can now send emails to CaseMap in bulk from Outlook. Each email is created as a separated object record.
- Creating a new object for the extracted attachment(s) When using the Outlook plug-in to extract an attachment from an email, attachments are extracted in their native format to a user-specified folder and linked to CaseMap as new object records. The records are added as Document object records and identified by the file name of the attachment.
- Linking Email objects to the Documents spreadsheet A new 'Link attachments as separate records' check box has been added to the 'Send Email to CaseMap' dialog box. When selected, all attachments/objects are added to the Documents spreadsheet in CaseMap. If the check box remains unchecked, then any of the CaseMap spreadsheets can be selected.
- Linking attachment(s) to parent email When email attachments are extracted and linked to Case-Map, the parent/child relationship is maintained. Attachment records are linked to the parent email via the "Attachment(s)" field on the Documents spreadsheet.

Find and redact text on a document

Now in CaseMap you can search and find words or phrases to be redacted. Additional enhancements/capabilities include:

- Create redaction(s) using 'Find and Redact' A new button has been added to the DocManager Home tab for utilizing the 'Find and Redact' feature.
- Finding and redacting words or phrases New search capabilities have been added to CaseMap that allows you to locate words and/or phrases in a document to be redacted.



- **Redacting personal privacy information** CaseMap provides you with the ability to redact common/personal privacy information such as social security numbers, date of birth, phone numbers, etc.
- **Redaction confirmation display** A dialog box is now displayed in CaseMap to confirm the total number of redactions when the Find & Redact function is used to create redactions.

Code object metadata when importing linked files

Now you can import files into CaseMap based on who provided them to you, thus enabling you in simplifying the document review and production workflow processes by means of:

- Populating and selecting object spreadsheet fields A new screen, to include additional check boxes has been added to the Import Linked Files Wizard that allows you select and populate specified fields within a CaseMap spreadsheet.
- Specify a source when importing documents Now when importing files into CaseMap, you will be prompted whether or not to enter a document source. By selecting Yes, you will be able to code a source for the documents being imported.
- Select destination field and specify coding values The Import Linked File Wizard now allows you to display and select destination fields for coding source information as well as marking documents for review.

Double-click to open linked files

In addition to clicking on the linked file indicator (paperclip icon) to view the directory path of the native file, and the type of file that is linked to a record in CaseMap, now you can double-click on the paperclip icon to open the file(s) and/or research linked documents.

Produce documents to TIFF

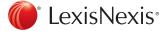
A new 'TIFF Image' option has been added to the Document Production wizard that allows you to produce and save documents in the TIFF Image format.

Produce documents rendered in grayscale

Now in CaseMap you can convert all document content colors to grayscale.

Endorse additional information on produced document

CaseMap now allows you to include additional information such as statements of confidentiality on a document. You can also specify the location of the added information in the header or footer of the document.



Additional functionality includes the ability to:

- Add header and footer content to produced documents A new screen has been added to the Document Production wizard that allows you to add new header and footer content to produced documents.
- Apply header and footer content to documents With the addition of the new header and footer content
 screen being added to the Document Production wizard, you can now add the header and/or footer information
 to all documents being produced or to specific documents produced by using the 'Saved Filters' criteria.

Resolved Issues

SmartAssist throws an error when searching SQL related tasks

Resolved an issue where SmartAssist was displaying an error when searching SQL related tasks in the non-SQL mode

The 'Send Email to CaseMap' context menu button is not available in Outlook 2013

Resolved an issue where the 'Send Email to CaseMap' context menu button was not being displayed in Outlook 2013 when multiple emails were selected.

CaseMap 'change linked file path' utiliy not seeing mapped drives

Resolved an issue where the CaseMap 'Change Linked File Path' utility was not seeing mapped drives.

Known Issues

- CaseMap 12.1 is incompatible with Microsoft® Office 2016.
- An error is displayed during the installation of CaseMap 12.1 when Microsoft Outlook 2016 is installed on the same machine

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