

# CaseMap 12.1 Release Notes

## Enhancements

### SmartAssist

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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

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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 CaseMap, 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

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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

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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

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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

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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

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

## Endorse additional information on produced document

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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:

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- **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

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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

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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' utility not seeing mapped drives

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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.