

CASEMAP

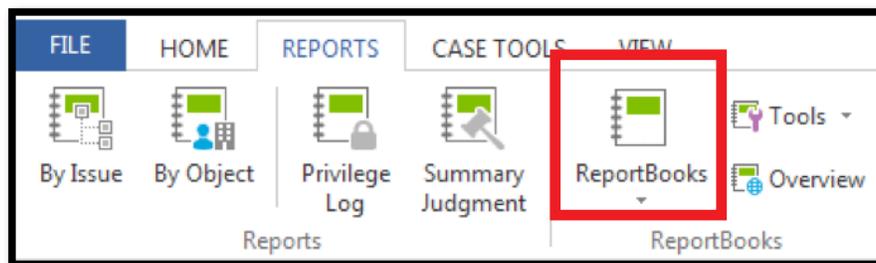
Creating Custom ReportBooks in CaseMap



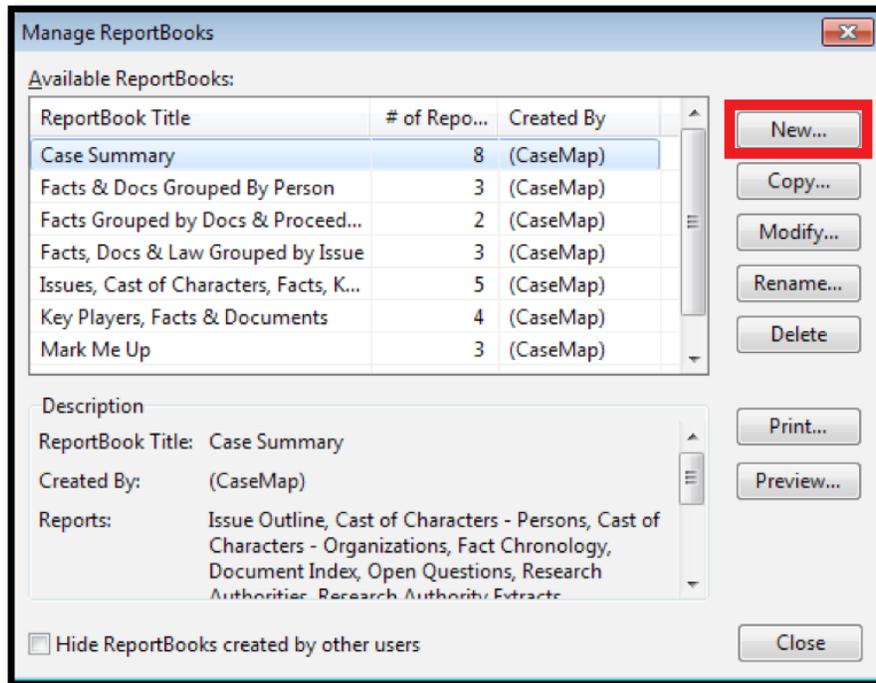
Note: you may wish to use this guide in conjunction with the guide on **Reviewing Documents and Creating Affidavits of Documents – Schedule A**.

Follow these simple steps to create your own custom report in CaseMap:

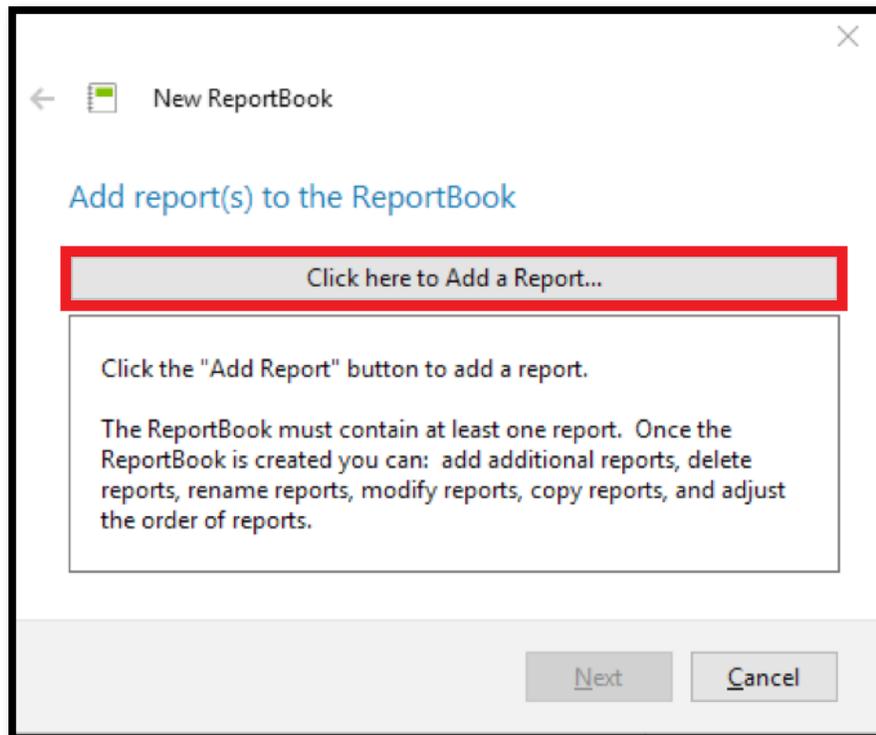
1. From the **Reports Tab**, click on **ReportBooks** and select **Manage ReportBooks** – this will be the first item in the dropdown menu.



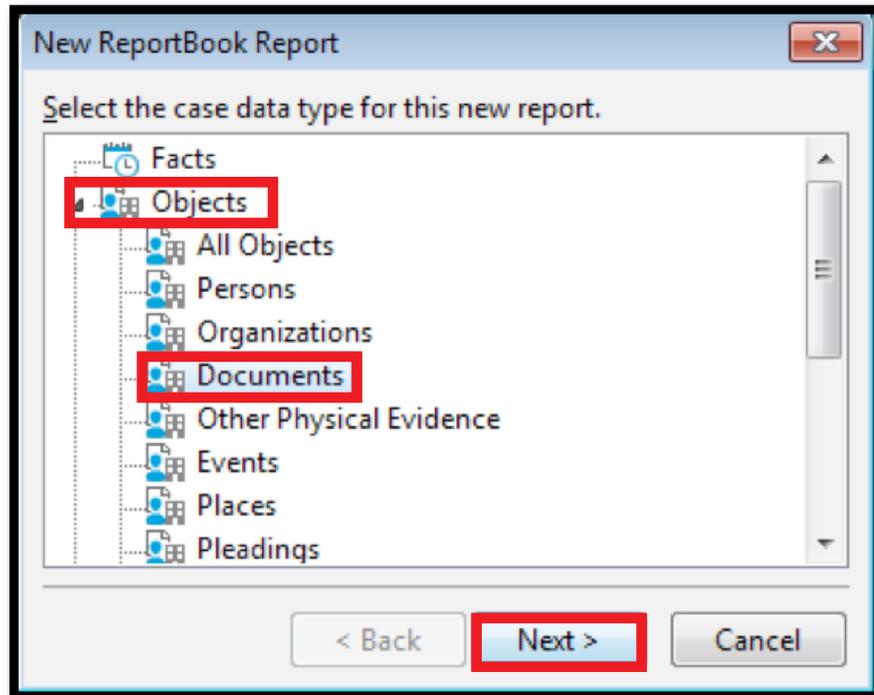
2. From the **Manage ReportBooks** screen, click **New...**



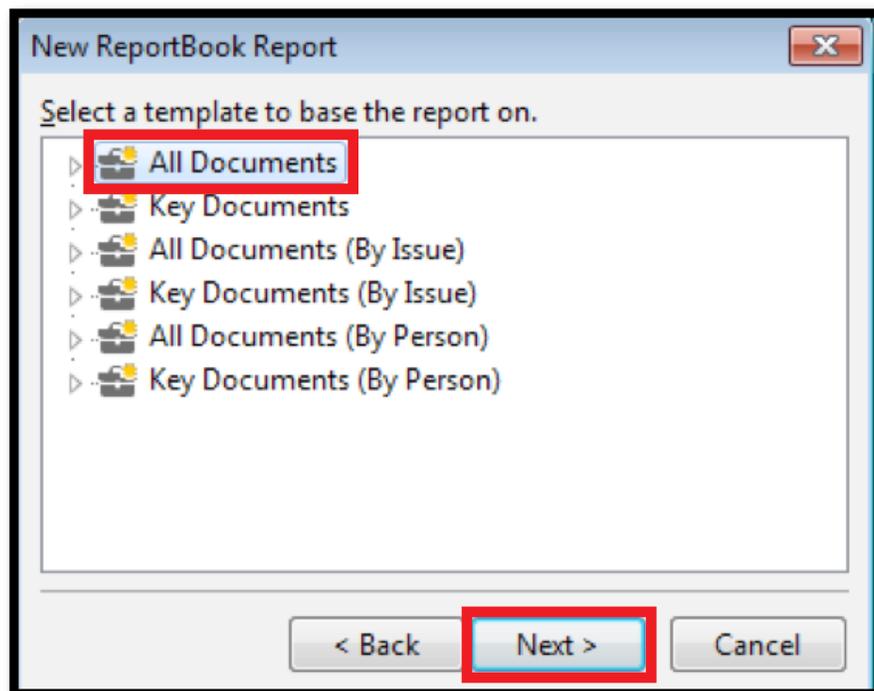
3. Click the **Add a Report** button.



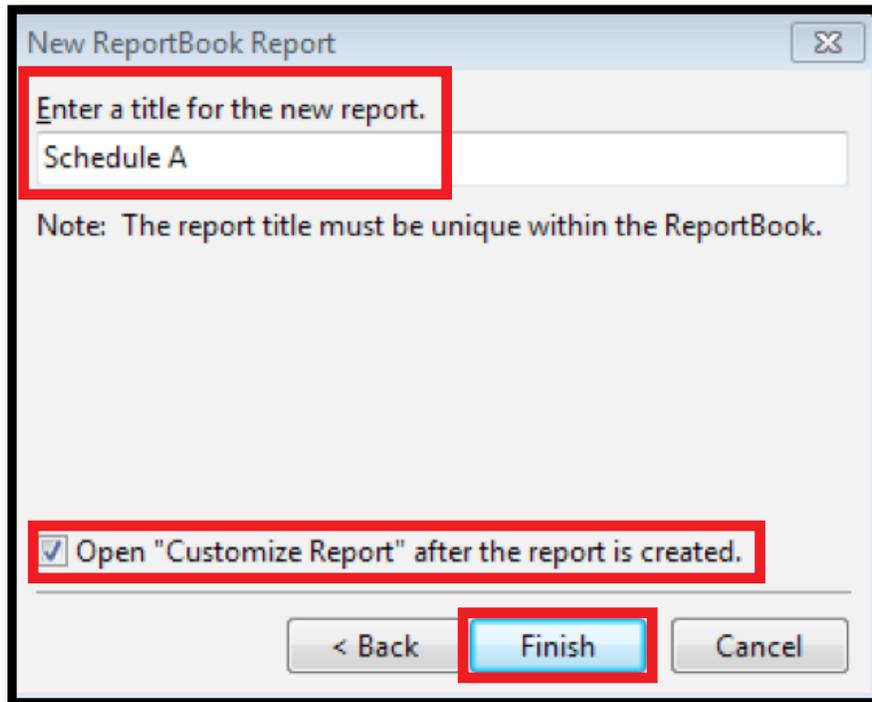
4. Click the arrow to expand the **Objects** spreadsheet options. Select **Documents** as the case data for this report. Then, click **Next**.



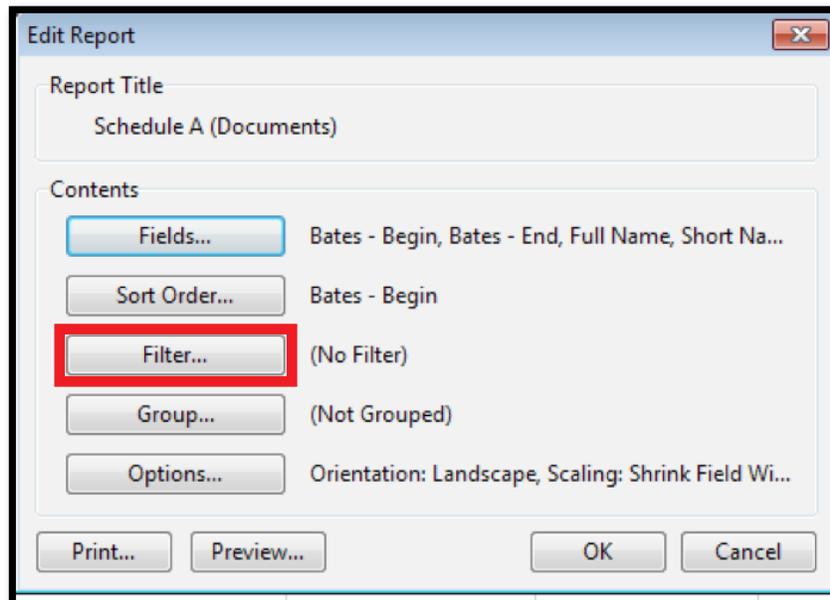
5. Select **All Documents** as the template on which to base the report. Click **Next**.



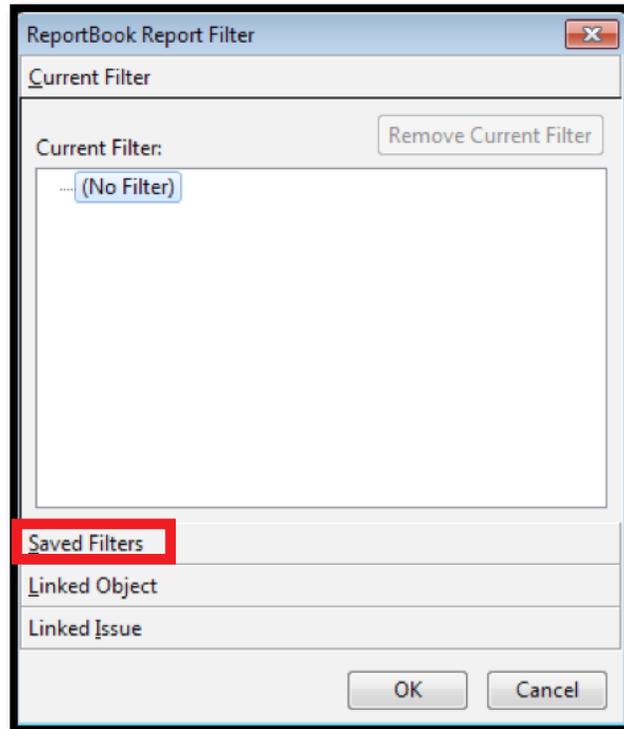
6. Enter a title for the report in the box provided and check the **Open "Customize Report" after the report is created** box. Click **Finish**.



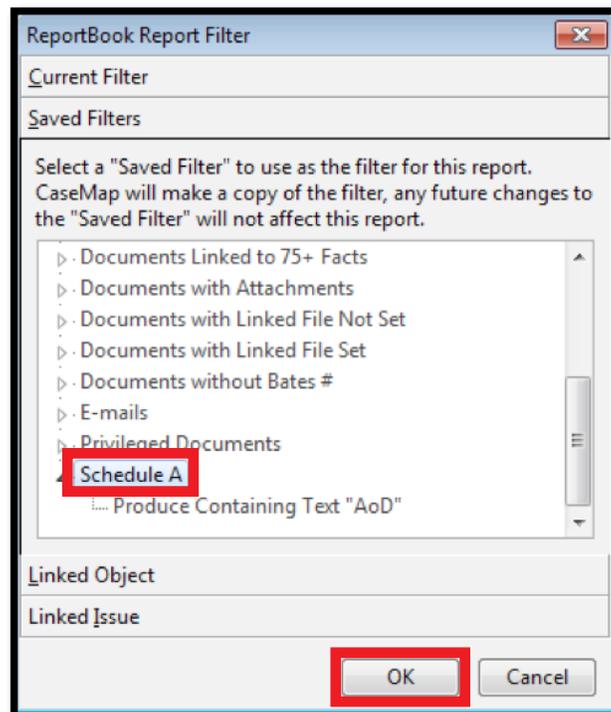
7. If you wish to create a report based on specific data (i.e., based on a saved filter), click the **Filter...** option.



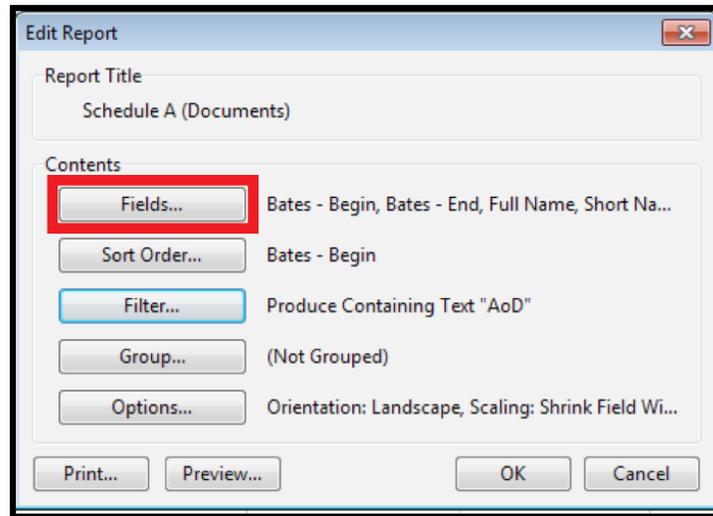
8. Select **Saved Filters**.



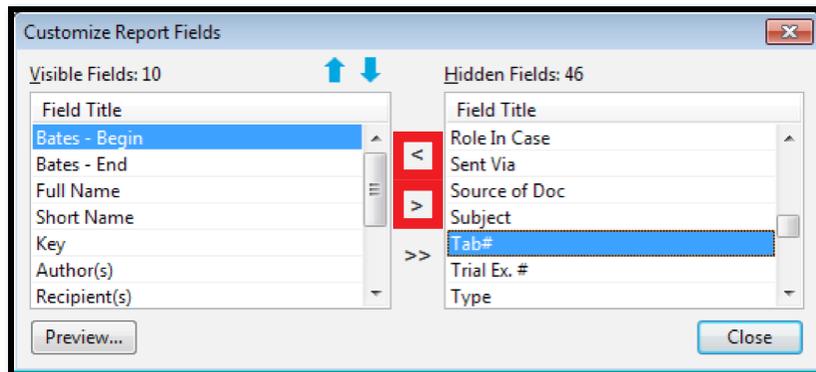
9. Then, scroll down and locate desired filter (e.g., **Schedule A**); select it and click **OK**.



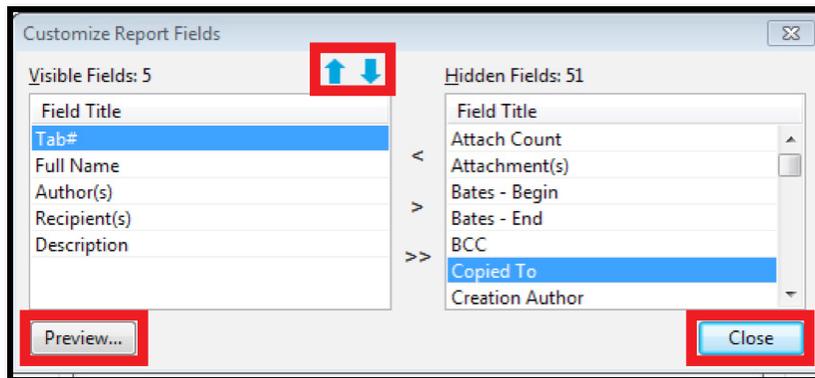
10. Next, click on the **Fields...** option.



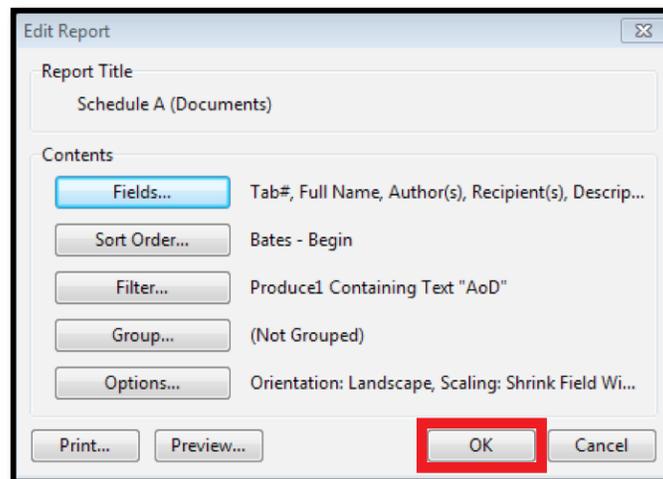
11. Locate desired field(s) to include in the report (e.g., **Tab#**), and click to highlight. Then, use the **< arrow key** to move field(s) to the **Visible Fields** column. Similarly, use the **> arrow key** to move any fields that you do not wish to be included in the report to the **Hidden Fields** column.



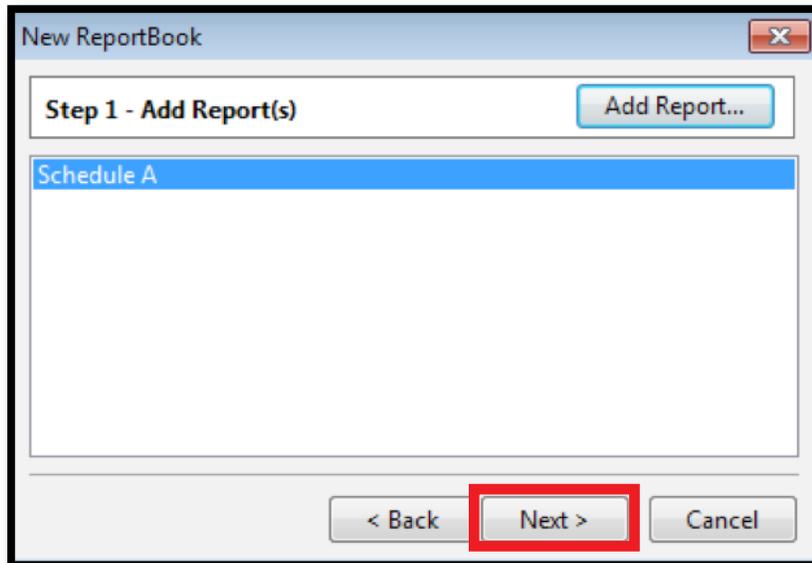
12. Once all desired fields appear in the **Visible Fields** column, you can adjust the order in which the field columns appear in the report by highlighting the relevant field(s) and using the up and down arrow keys to move them to the desired place. To view what the report will look like once published, click the **Preview...** option. Once the columns are satisfactorily arranged, click **Close**.



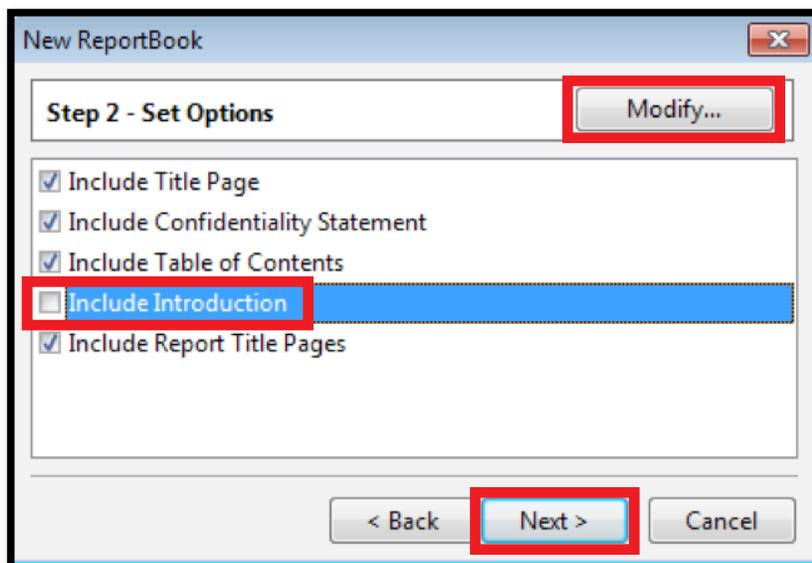
13. From the **Edit Report** screen, click **OK**.



14. The **New ReportBook** screen will display, with the newly created report listed. Click **Next**.



15. The next screen will allow you to set report options. By default, all report component boxes will be checked. To remove a component from the report, click on the relevant check box to deselect it. To customize a component, highlight it and select the **Modify...** option. That will take you to a screen that will allow you to customize its content and appearance. When finished setting report options, click **Next**.



16. Enter a title for the **ReportBook** in the box provided, and click **Finish**.

New ReportBook

Step 3 - Name ReportBook and Finish

Enter a title for the new ReportBook.
Affidavit of Documents

Note: The title must be unique within this case.

Open "Customize ReportBook" after the ReportBook is created.

< Back **Finish** Cancel

17. The new custom report will appear in your **ReportBooks** options and can be run as many times as needed without having to recreate the report. Going forward, this report can also be modified at any time by highlighting the report and selecting the **Modify...** option. Now that your custom report has been created, click **Close** to exit the **Manage ReportBooks** screen.

Manage ReportBooks

Available ReportBooks:

ReportBook Title	# of Repo...	Created By
Affidavit of Documents	1	AttorneyC
Case Summary	8	(CaseMap)
Facts & Docs Grouped By Person	3	(CaseMap)
Facts Grouped by Docs & Proceed...	2	(CaseMap)
Facts, Docs & Law Grouped by Issue	3	(CaseMap)
Issues, Cast of Characters, Facts, K...	5	(CaseMap)
Key Players, Facts & Documents	4	(CaseMap)

Description

ReportBook Title: Affidavit of Documents
Created By: AttorneyC
Reports: Schedule A
Options: Font Name : Arial, Report Title Font Size:12, Report Body Font Size: 10; Report Settings: Include Report

Hide ReportBooks created by other users

New...
Copy...
Modify...
Rename...
Delete
Print...
Preview...
Close