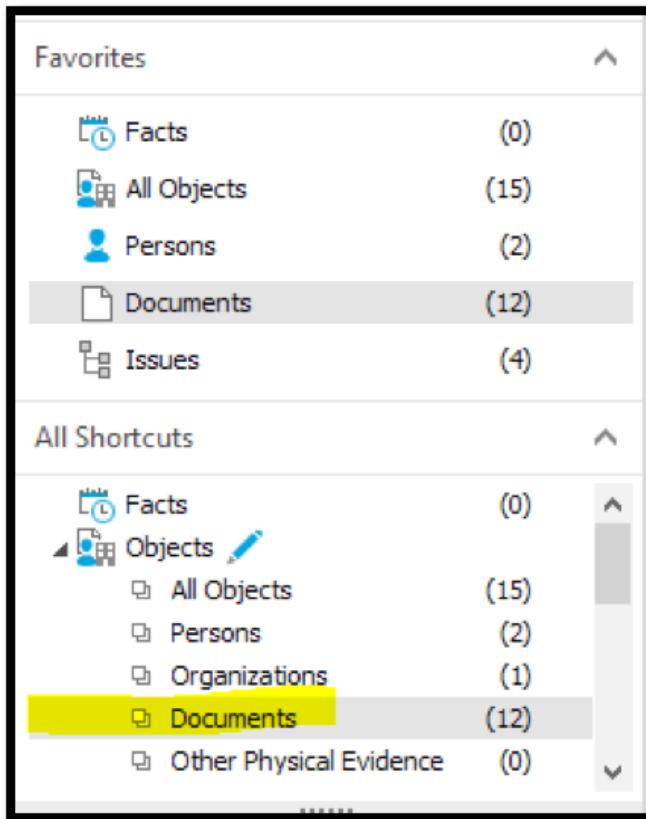# CASEMAP

Creating a Custom View in CaseMap

Custom views can be created for each of the five types of spreadsheets: Facts, Objects, Issues, Questions, and Research. Follow these simple steps to create a custom view in CaseMap.

1. From the panel on the left-hand side of the screen, click on the type of spreadsheet for which you would like to create the view (e.g., Documents).
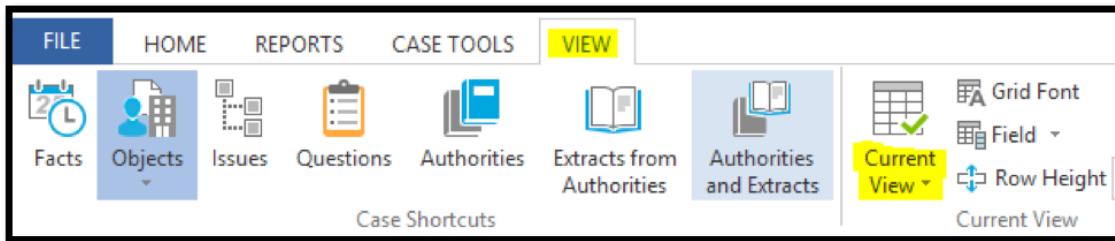
2. Then, from the View tab at the top of the screen, select Current View.

3. Click on Define Views... from the Current View menu
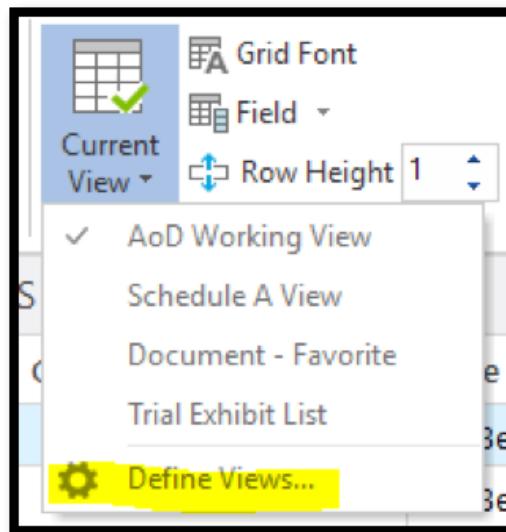
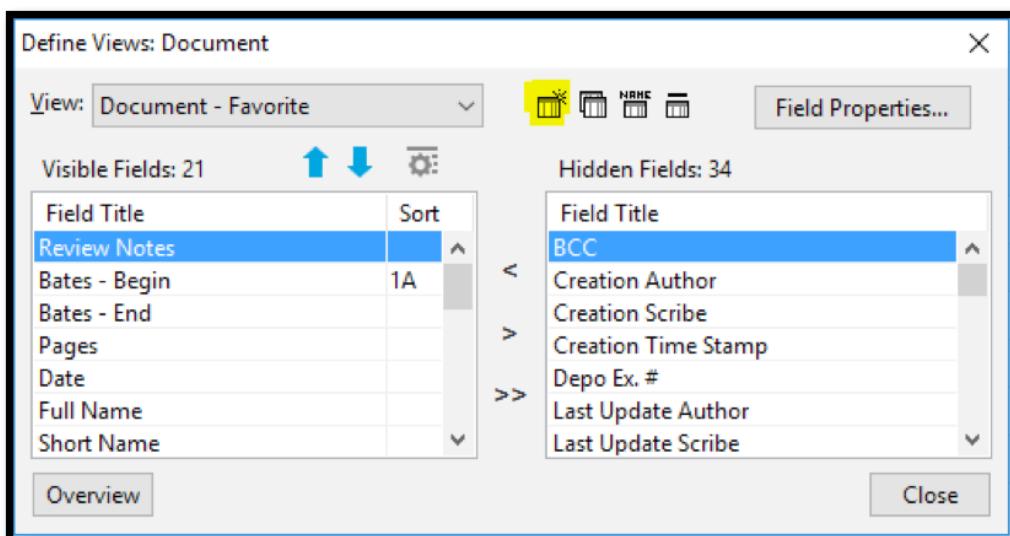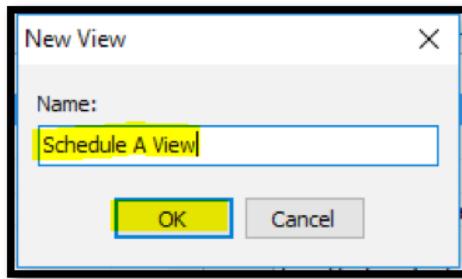4. From the pop-up window, click on the first chart view, located to the right of the View drop-down menu.

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5. Enter a title for the view in the Name box, and click OK.

6. Select the fields you wish to include in your view by double-clicking on the desired fields displayed in the Hidden Fields panel on the right-hand side. These will subsequently appear in the Visible Fields panel on the left.
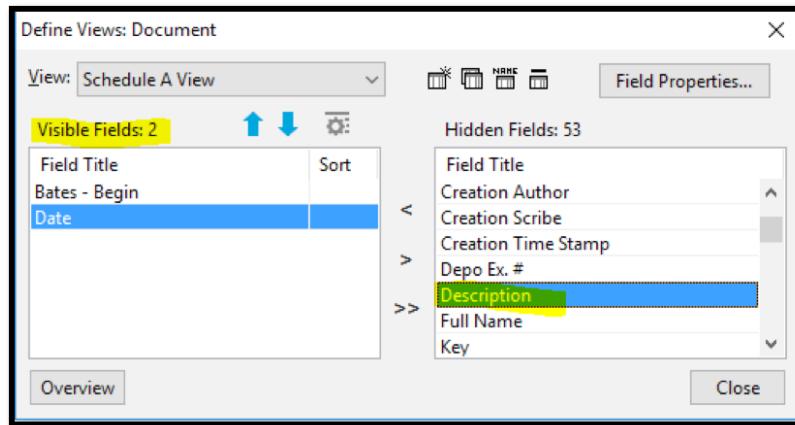
7. When you have finished selecting all desired fields, you can adjust the order in which they will appear on screen by first highlighting the relevant field, and then using the arrow buttons to move the field up or down on the list.
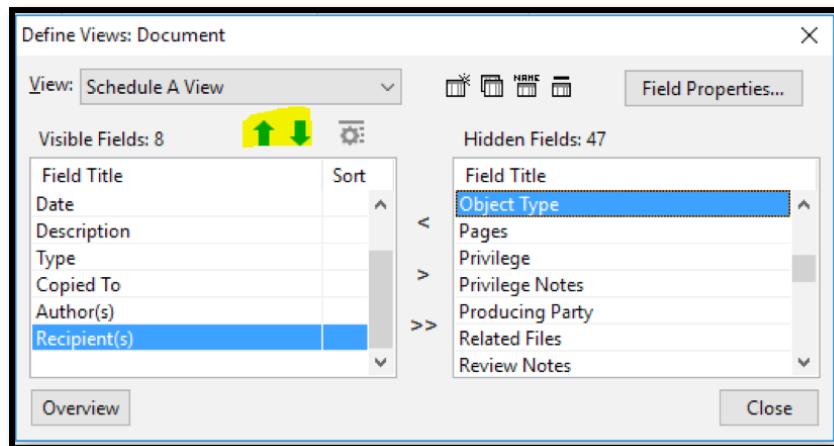
8. Next, click on the gear icon to the right of the arrow buttons.
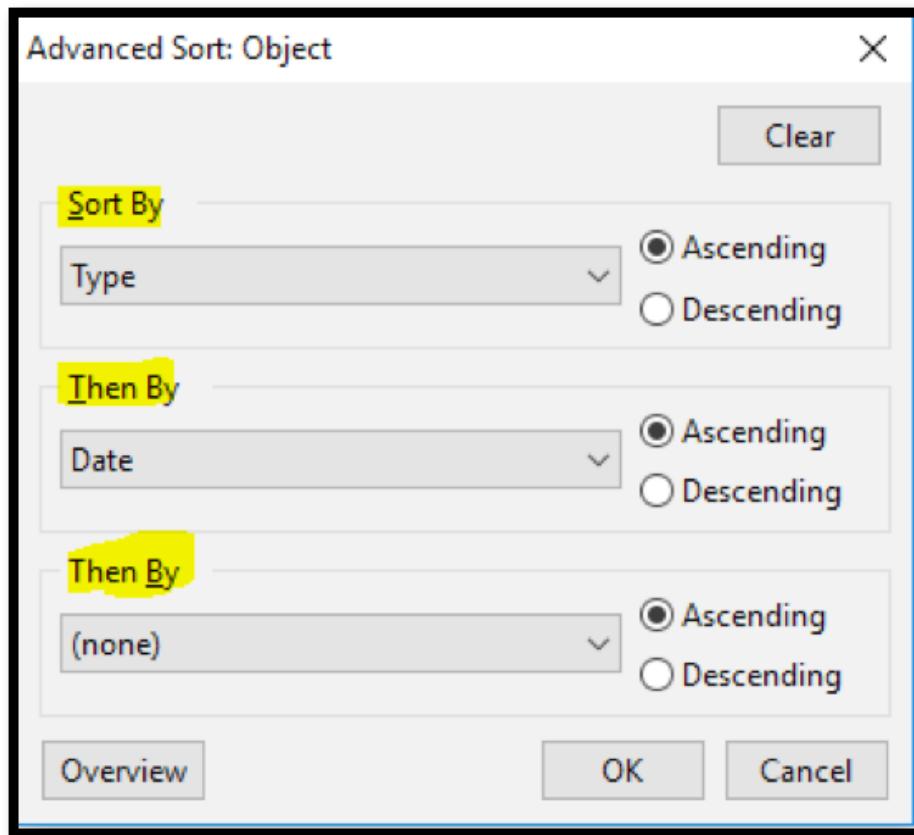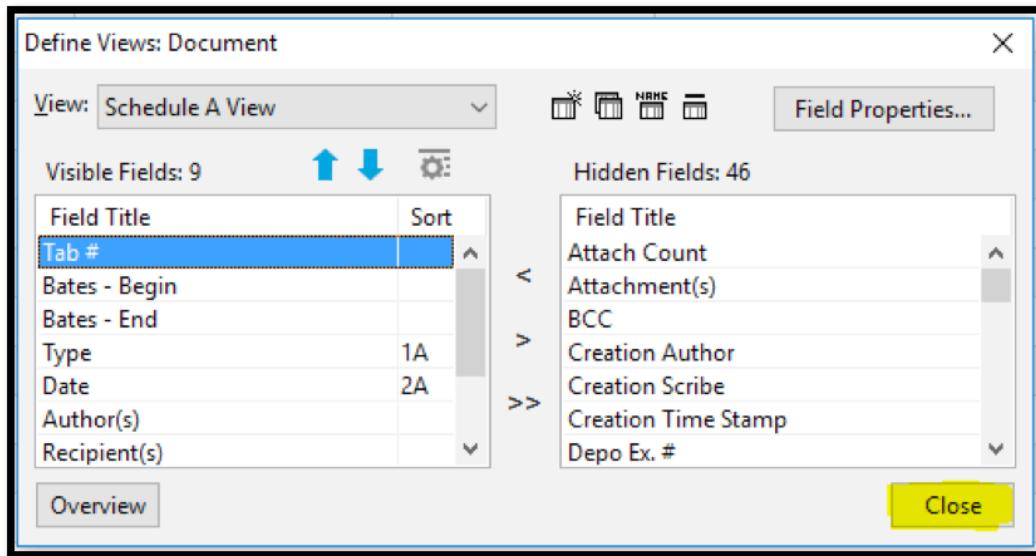
Define Views: Document

View: Schedule A View

Visible Fields: 9

Field Title	Sort
Tab #	
Bates - Begin	
Bates - End	
Type	
Date	
Author(s)	
Recipient(s)	

Field Properties...

Hidden Fields: 46

Field Title
Attach Count
Attachment(s)
BCC
Creation Author
Creation Scribe
Creation Time Stamp
Depo Ex. #

Overview   Close
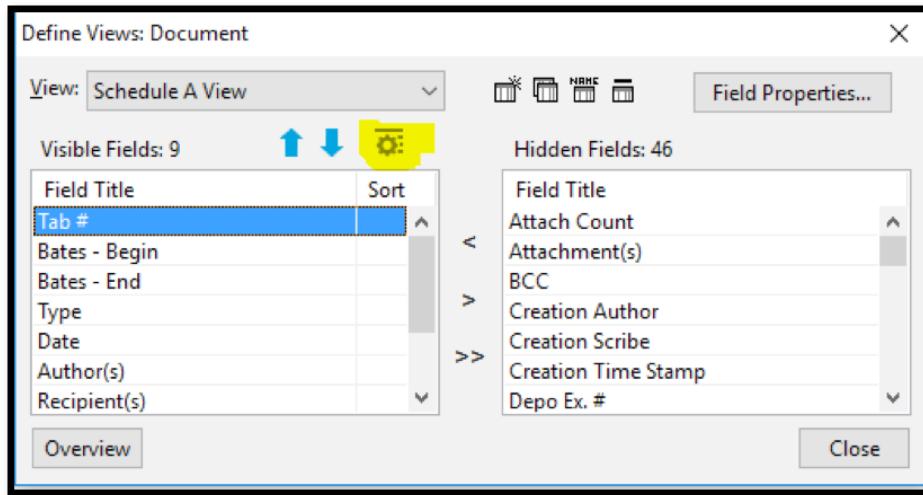
9. Using the Sort By and Then By dropdown menus, choose how you would like data to be sorted in your view, and click OK.

Advanced Sort: Object

Clear

Sort By

Type   ◉ Ascending   ○ Descending

Then By

Date   ◉ Ascending   ○ Descending

Then By

(none)   ◉ Ascending   ○ Descending

Overview   OK   Cancel

10. Click Close.

11. Your view is now created and will be accessible from the Current View dropdown menu in the View tab. (Remember that views are specific to each spreadsheet type, so in order to access the desired view, you will need to ensure you have first selected the correct spreadsheet type, e.g., Documents or Facts).