



Efficient Ways to Organize, Analyze and Report on Your Case Facts and Issues

Quick How-To-Guide

Connected case analysis tools with interactive visuals

What if organizing case evidence could be easier—and even visually intuitive? Now it is. In today's complex litigation environment, you can save time and effort with new, interactive, full-color visual tools in LexisNexis® CaseMap® 14 case analysis software.

Use enhancements including the CaseMap® dashboard to more easily start your case file, gather and organize documents from multiple resources, locate specific facts and collaborate on a sound strategy.

You can count on the full complement of CaseMap tools as you perform efficient and effective case analysis. In this guide learn how to:

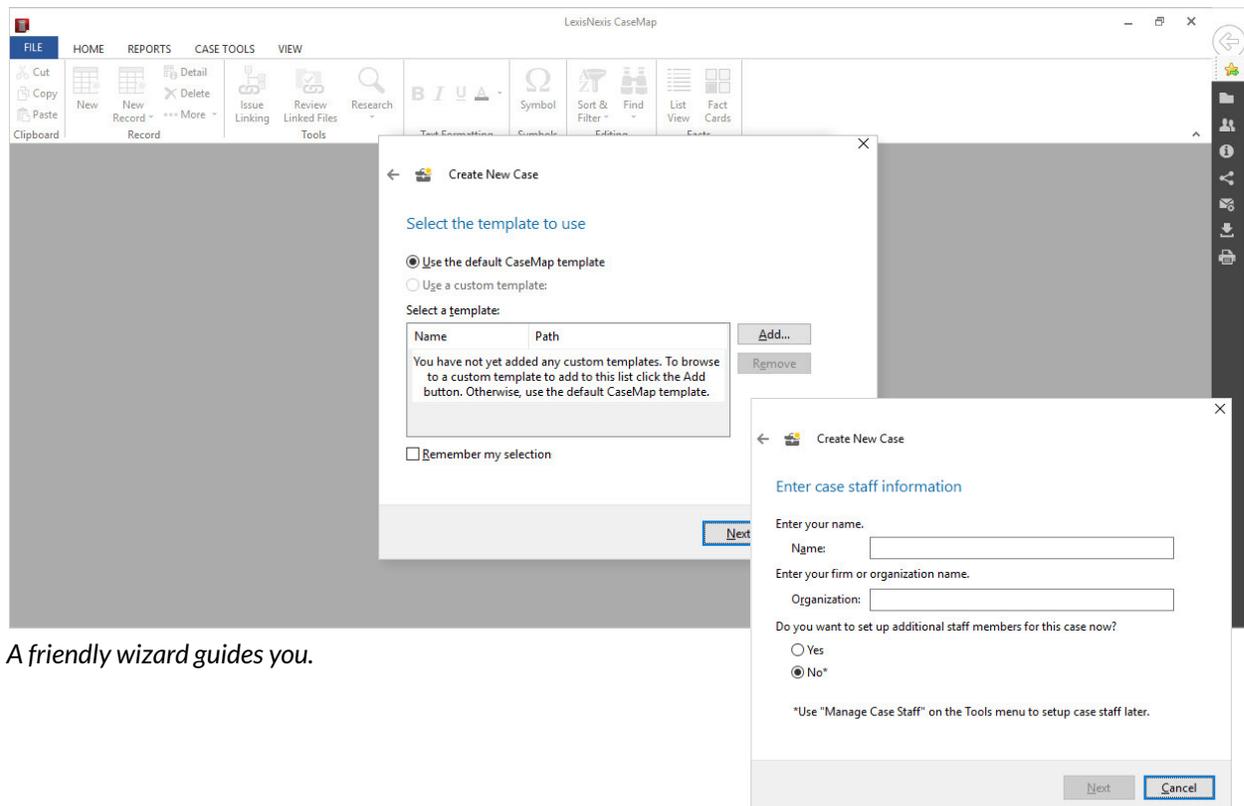
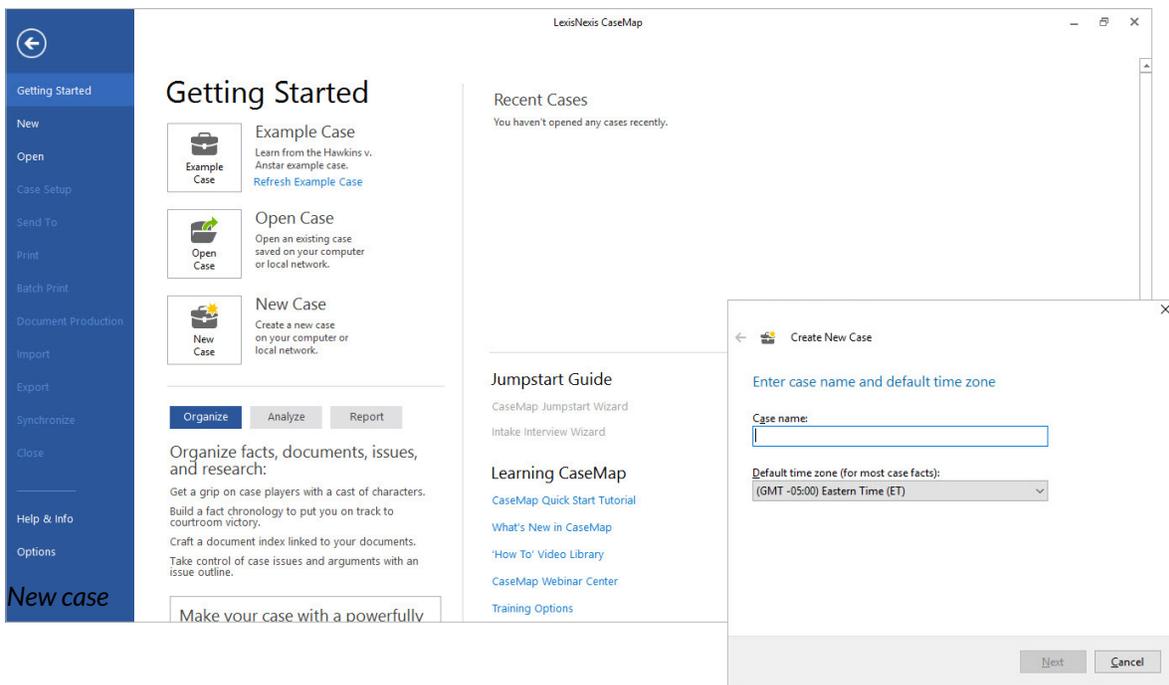
- Organize
- Analyze
- Report

Organize The Facts

CaseMap is the essential case analysis software for managing facts, documents, persons, evidence, issues, and legal and investigative research—from intake through settlement or trial.

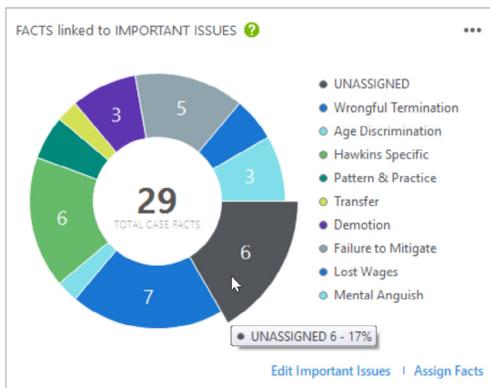
Starting a new case

The **Getting Started** page provides options of either opening a saved case or creating a new one.

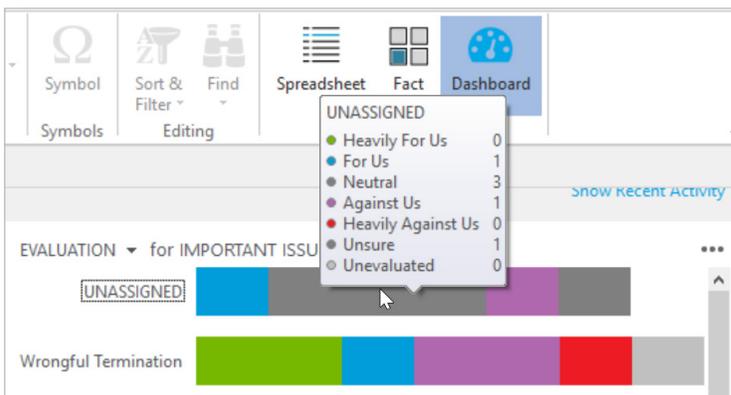


A friendly wizard guides you.

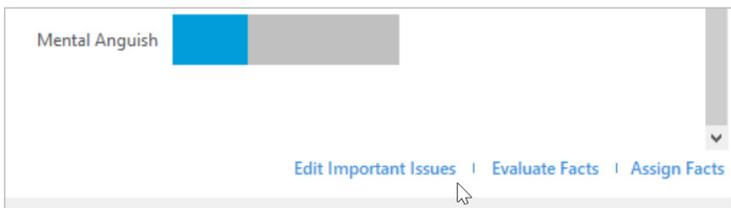
See a case overview, progress and next steps with the visual CaseMap dashboard



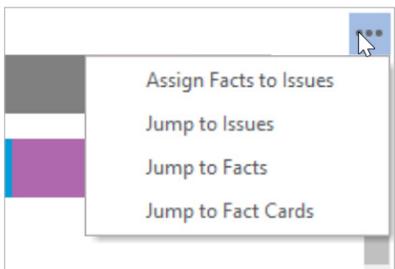
Get an overview of your facts linked to important issues. See the percentage of your facts aligned to specific issues and recognize which issues need additional work. Using the links below the donut chart, you can **Edit Important Issues** or **Assign Facts**.



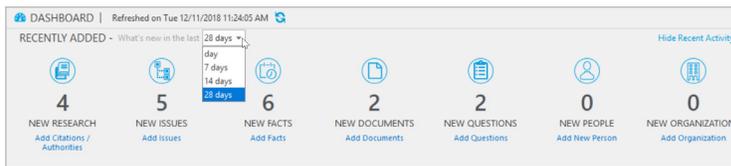
From the **Team Evaluation** view on your dashboard, you can see how specific facts have been evaluated in relation to key issues.



Scroll down to the bottom of your evaluations and click the link you need to **Edit Important Issues**, **Evaluate Facts** or **Assign Facts**.



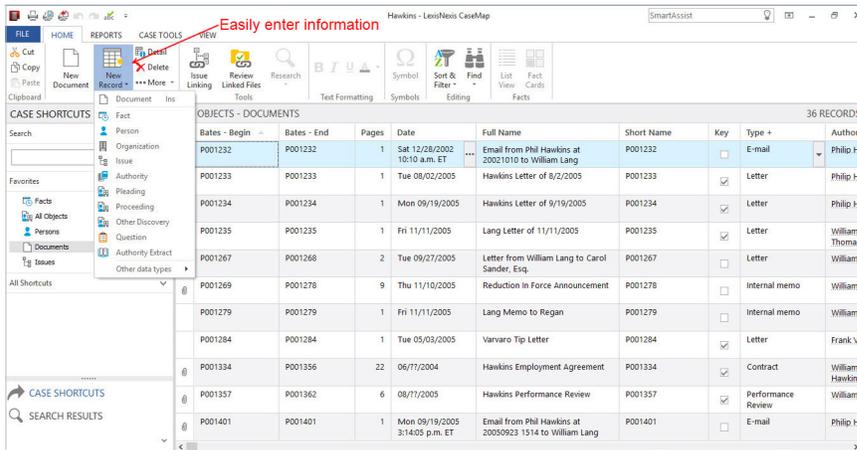
With your left navigation pane closed, you can keep your dashboard view large. A convenient pull-down menu at the top right takes you to specific tasks.



Quickly see how much work was done recently using the **Show/Hide Recent Activity** link toward the top right, resulting in this view. This display also provides shortcut links like **Add Citations/Authorities**.

Next, take a look at the nuts and bolts of organizing, analyzing and reporting on your evidence using CaseMap case analysis software.

Adding a case record

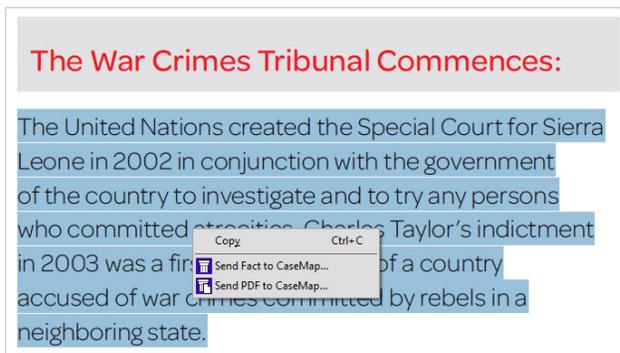


To add a record, click **New Record** and choose between the options shown. To edit a record, double click on it and edit. If you need to undo your last edit, press the Esc key before leaving the cell.

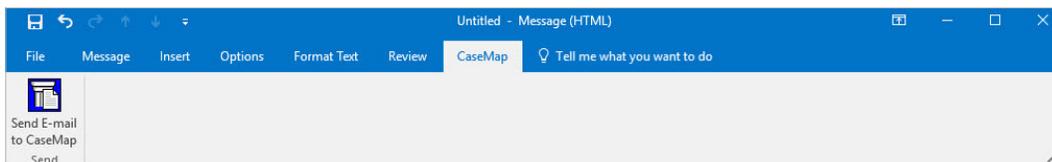
Working with the Facts spreadsheet

The easiest way to add facts to the Facts spreadsheet is to pull them directly from documents. CaseMap software is integrated with over **30 litigation support programs**, using an easy **Send to CaseMap** feature.

A PDF is the most common format for electronic documents. The DocPreviewer™ plug-in for PDFs enables setting up documents as objects and selecting linked facts from them.



From a PDF file, highlight the content you need, right-click and choose between **Send Fact to CaseMap...** or **Send PDF to CaseMap...**



From Microsoft® Outlook® mail, click the CaseMap tab and choose **Send E-mail to CaseMap**.

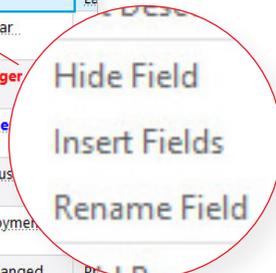
Changing the spreadsheet view

Having the ability to change how data is displayed on your screen is important because:

- Different views can help organize your thinking
- How you see the data on the screen is how it will appear in your reports

FACTS (Search Results)

Date & Time	Fact Text	Source(s)	Material	Status	Linked Issues	Evaluation
Mon 11/25/2002	LangW meets Haw... Bakersfield.		Yes	Disputed by: US		
12/??/2002	William Lang invites Biotech Industries f...		No	Prospective	Wrongful Termination	
01/??/2003	William Lang offers position at Anstar f...		Yes	Undisputed	Retaliation	
Mon 01/13/2003	Philip Hawkins joi... Sales Manager.		Yes	Undisputed	Retaliation	
Mon 12/01/2003	Philip Hawkins promoted to Anstar. Biotech Indus... of Sales.		Yes	Undisputed	Wrongful Termination	
Fri 01/09/2004 to Wed 01/21/2004	Philip Hawkins negotiates draft Hawkins Employment... Agreement with William Lang.		Yes	Undisputed	Wrongful Termination	
02/??/2004	William Lang tells Philip Hawkins that he has changed his mind regarding the Hawkins Employment...		Yes	Disputed by: US	Wrongful Termination	
Wed 05/11/2005	Philip Hawkins receives Hawkins Performance Review from William Lang. Is rated a 1 "Outstanding"		Yes	Undisputed	Wrongful Termination, Deserved, Termination	
06/??/2005	William Lang makes decision to reduce size of staff.		Yes	Disputed by: US	Hawkins Specific	
			Yes	Undisputed	Pattern & Practice	



Click the field you want to change, then right-click to choose your options.

Navigation Pane

Date & Time	Fact Text	Source(s)	Material	Status	Linked Issues	Evaluation
11/25/2002			Yes	Disputed by: US		
12/??/2002			No	Prospective	Wrongful Termination	
01/??/2003			Yes	Undisputed	Retaliation	
Mon 01/13/2003			Yes	Undisputed	Retaliation	
Mon 12/01/2003	Philip Hawkins promoted to Anstar. Biotech Industries VP of Sales.	InterviewNotes	Yes	Undisputed	Retaliation	
Fri 01/09/2004 to Wed 01/21/2004	Philip Hawkins negotiates draft Hawkins Employment... Agreement with William Lang.	Hawkins Employment... Agreement.	Yes	Undisputed	Wrongful Termination	
02/??/2004	William Lang tells Philip Hawkins that he has changed his mind regarding the Hawkins Employment...	Philip Hawkins, Deposition of William...	Yes	Disputed by: US	Wrongful Termination	
02/??/2004	Susan Sheridan has dinner with Linda Collins and complains about Anstar Biotech Industries management.	Deposition of Linda Collins, 33:15.	Unsure	Disputed by: US		
Wed 05/11/2005	Philip Hawkins receives Hawkins Performance Review from William Lang. Is rated a 1 "Outstanding"	Hawkins Performance... Review	Yes	Undisputed	Wrongful Termination, Deserved, Termination	
06/??/2005	William Lang makes decision to reduce size of staff.	Deposition of Karen Thomas, 43:19	Yes	Disputed by: US	Hawkins Specific	
07/??/2005	Susan Sheridan is terminated.	Deposition of Philip Hawkins	Yes	Undisputed	Pattern & Practice	

Minimized navigation pane

Navigation Pane

- FACTS
- All Objects
- Persons
- Documents
- Issues

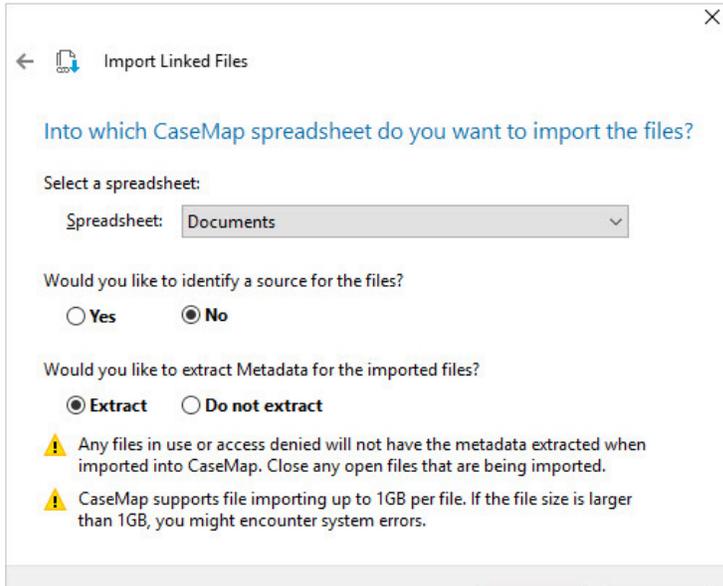
Date & Time	Fact Text	Source(s)	Material	Status	Linked Issues	Evaluation
Mon 11/25/2002	LangW meets Haw... Bakersfield.	DepoLang, 23:14; InterviewNotes, P001401	Yes	Disputed by: US		
12/??/2002	William Lang invites Biotech Industries f...		No	Prospective	Wrongful Termination	
01/??/2003	William Lang offers position at Anstar f...		Yes	Undisputed	Retaliation	
Mon 01/13/2003	Philip Hawkins joi... Sales Manager.		Yes	Undisputed	Retaliation	
Mon 12/01/2003	Philip Hawkins promoted to Anstar. Biotech Indus... of Sales.		Yes	Undisputed	Wrongful Termination	
Fri 01/09/2004 to Wed 01/21/2004	Philip Hawkins negotiates draft Hawkins Employment... Agreement with William Lang.		Yes	Undisputed	Wrongful Termination	
02/??/2004	William Lang tells Philip Hawkins that he has changed his mind regarding the Hawkins Employment...		Yes	Disputed by: US	Wrongful Termination	
02/??/2004	Susan Sheridan has dinner with Linda Collins and complains about Anstar Biotech Industries management.		Unsure	Disputed by: US		
Wed 05/11/2005	Philip Hawkins receives Hawkins Performance Review from William Lang. Is rated a 1 "Outstanding"		Yes	Undisputed	Wrongful Termination, Termination	
06/??/2005	William Lang makes decision to reduce size of staff.		Yes	Disputed by: US	Hawkins Specific	
07/??/2005	Susan Sheridan is terminated.		Yes	Undisputed	Pattern & Practice	

Expanded navigation pane

Custom view sharing

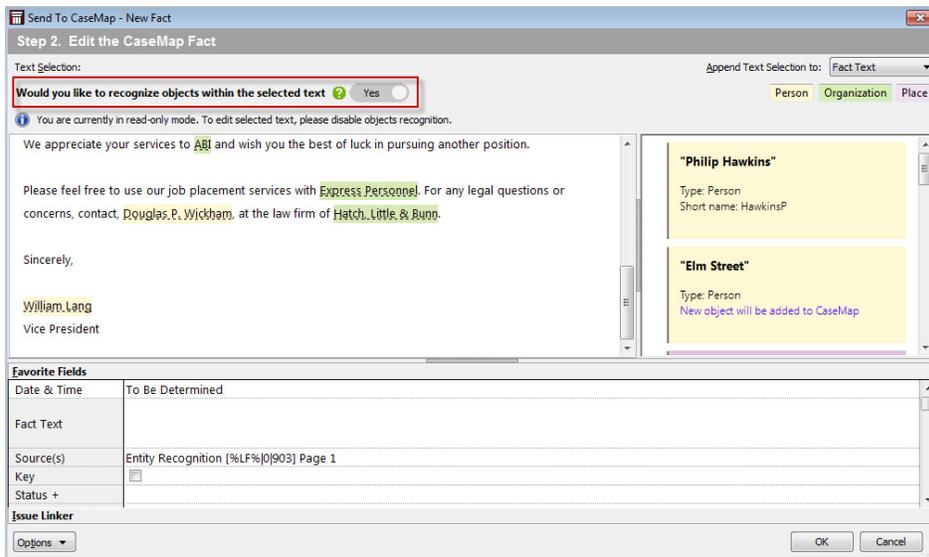
Whether your trial team works in the Microsoft® Access® or SQL Server® version of CaseMap software, you can go into a CaseMap spreadsheet and show only the columns you want to share. Then click the **Share View** link and select the staff members to include.

When importing files, you can easily capture document metadata



The screenshot shows the 'Import Linked Files' dialog box. It has a title bar with a close button (X) and a back arrow. The main text asks, 'Into which CaseMap spreadsheet do you want to import the files?'. Below this is a 'Select a spreadsheet:' section with a dropdown menu currently set to 'Documents'. The next question is 'Would you like to identify a source for the files?' with radio buttons for 'Yes' and 'No', where 'No' is selected. The final question is 'Would you like to extract Metadata for the imported files?' with radio buttons for 'Extract' and 'Do not extract', where 'Extract' is selected. There are two warning icons with text: 'Any files in use or access denied will not have the metadata extracted when imported into CaseMap. Close any open files that are being imported.' and 'CaseMap supports file importing up to 1GB per file. If the file size is larger than 1GB, you might encounter system errors.'

Easily identify people, places and organizations in your case with Object Recognition

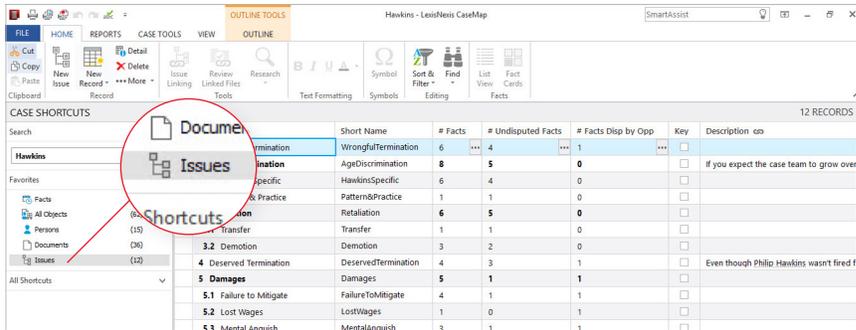


The screenshot shows the 'Send To CaseMap - New Fact' dialog box, specifically 'Step 2. Edit the CaseMap Fact'. It features a 'Text Selection:' area with a 'Would you like to recognize objects within the selected text?' checkbox checked. Below this is a text area containing a letter: 'We appreciate your services to ABI and wish you the best of luck in pursuing another position. Please feel free to use our job placement services with Express Personnel. For any legal questions or concerns, contact Douglas P. Wickham, at the law firm of Hatch, Little & Bunn. Sincerely, William Lang, Vice President'. To the right, a list of recognized objects is shown: 'Philip Hawkins' (Type: Person, Short name: HawkinsP) and 'Elm Street' (Type: Person, New object will be added to CaseMap). At the bottom, there is a 'Favorite Fields' table and an 'Issue Linker' section.

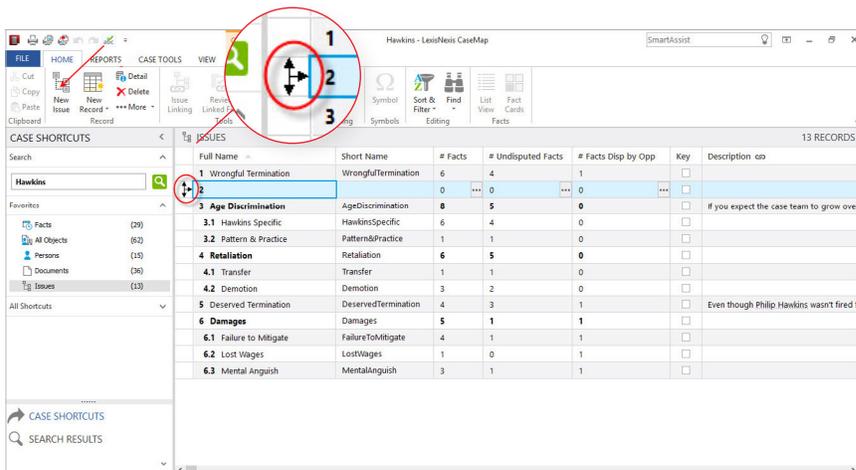
Favorite Fields	
Date & Time	To Be Determined
Fact Text	
Source(s)	Entity Recognition [%LF%][0]903] Page 1
Key	
Status +	

Object recognition

Establish relationships between data types within your case file



To develop a hierarchy of case issues, click **Issues** on the navigation pane.



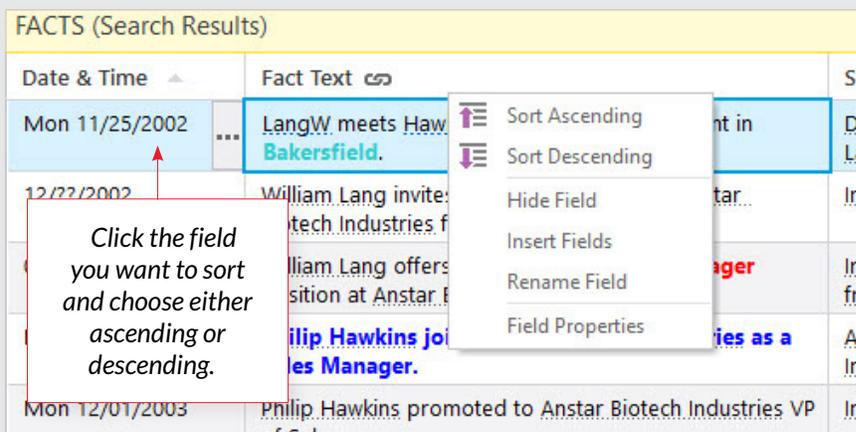
Click **New Issue** on the toolbar and type the name of the issue.

Use to promote, demote and move issues up and down the hierarchy.

Once you've linked your facts to issues, you can simply double-click in a # field to display, review or print the list of facts records linked to the selected issue.

Analyze the facts

Studying the case information from various angles may offer insights not otherwise easily discernible.



Click the field you want to sort and choose either ascending or descending.

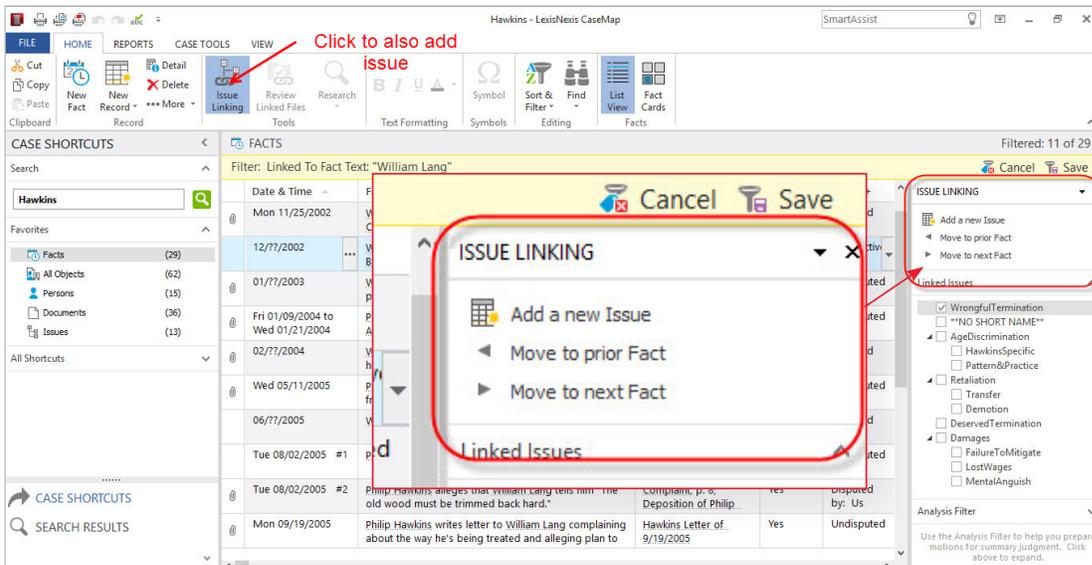
Sorting a spreadsheet

Sorting determines how the rows in a spreadsheet are displayed.

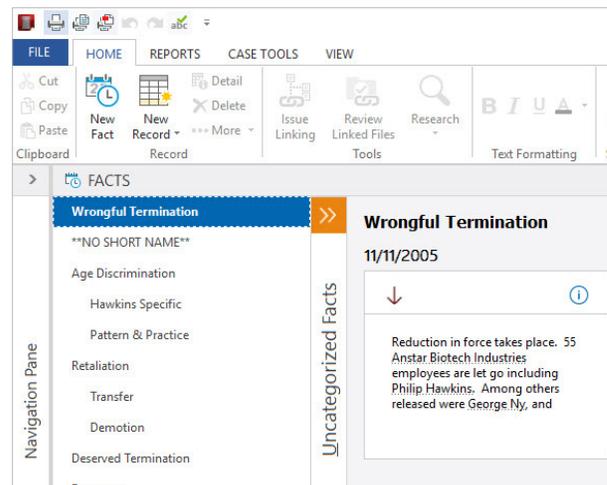
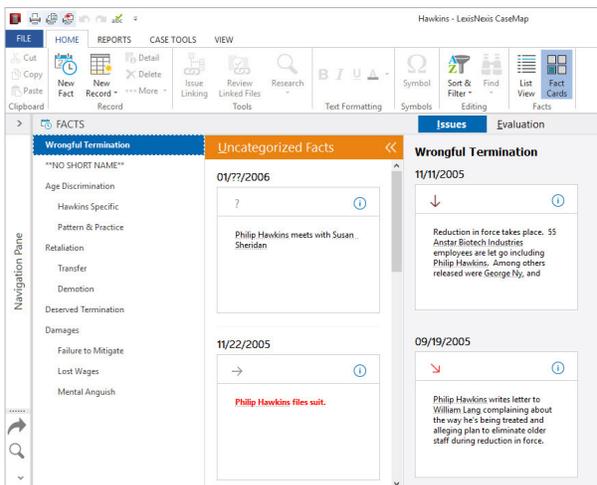
Fields with can't be sorted, and an error message explains why.



Using **CaseMap® Smart Assist**, search your entire case or run a search directly in the Lexis Advance® service.



Issue Linking can also be used to add a new issue or move facts.

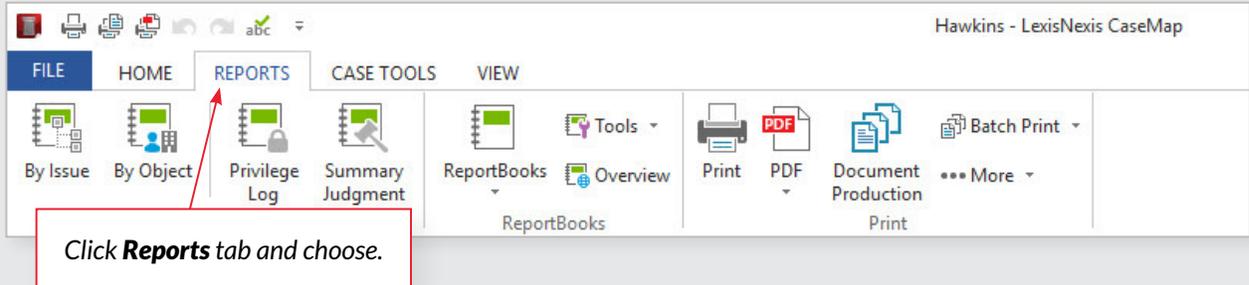


Fact card view visually stacks up facts in favor or against.

Report the facts

Create professional work product with a few clicks and output to paper, PDFs or Microsoft Word. Your case analysis reports are the raw materials that make it more efficient to generate documents required by the court.

For example, your **Fact Chronology** will make it far easier to create **motions for summary judgment** and to produce the list of facts you're willing to stipulate for many pretrial motions.



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LEARN MORE

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