

# CASEMAP

## Sending a Fact to CaseMap from DocManager

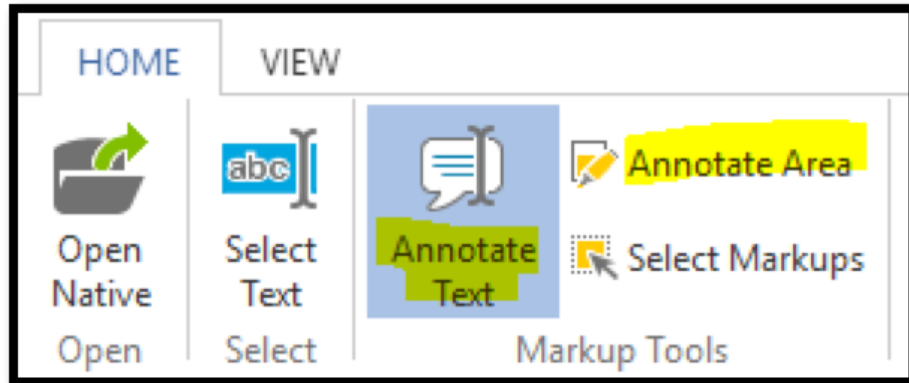


1. From the Documents spreadsheet in CaseMap, click the Review Linked Files button on the Home tab to open DocManager.

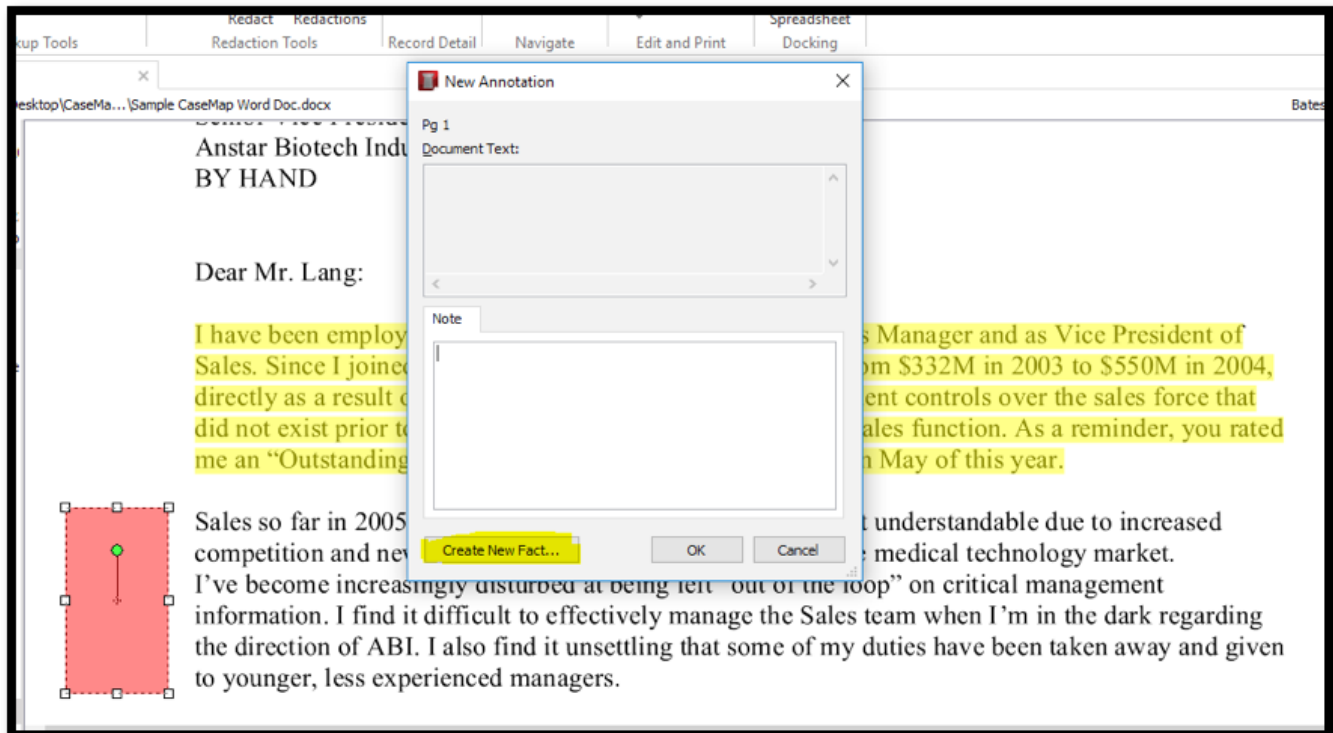
The screenshot shows the CaseMap software interface. The ribbon at the top includes tabs for FILE, HOME, REPORTS, CASE TOOLS, and VIEW. The HOME tab is active, showing a ribbon with buttons for Cut, Copy, Paste, New Document, New Record, Detail, Delete, Issue Linking, Review Linked Files (highlighted in yellow), and Research. Below the ribbon is a 'CASE SHORTCUTS' sidebar with a search box and a list of shortcuts: Facts (30), All Objects (71), Persons (17), Documents (41, highlighted in yellow), and Issues (12). To the right is an 'OBJECTS - DOCUMENTS' table with columns for Date and Short Name.

	Date	Short Name
	06/??/04	0000032
	Sat 12/28/2002 10:10 a.m. ET	PV0000012
	Mon 04/18/2005 11:39:56 p.m. ET	P002007
	Tue 04/19/2005 5:46:42 p.m. ET	P002011
	Tue 04/19/2005 6:30:01 p.m. ET	P002020

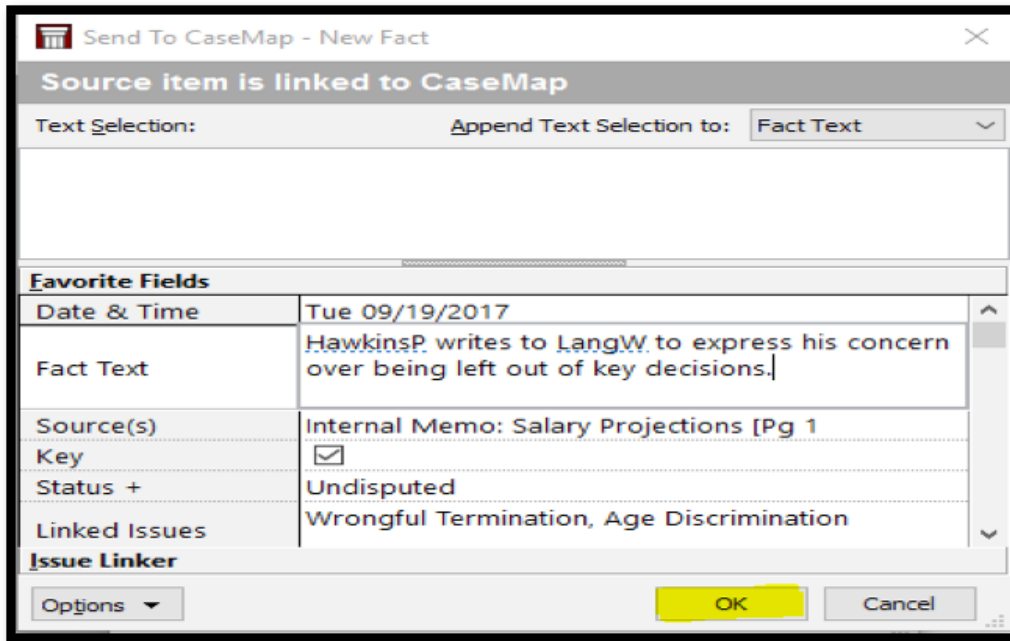
2. You have two options for sending a fact from a document to CaseMap. If you wish to capture an excerpt exactly as it appears in the document, select the Annotate Text button from the Home tab. If, however, you wish to summarize the contents of a portion of the document, select Annotate Area instead.



3. If you are capturing an excerpt from the document to include in your fact chronology, drag your mouse pointer to draw a box around the relevant lines of text. Alternatively, if you are summarizing the contents of a portion of the document, drag your mouse to form a box next to the relevant paragraphs or portion of the document. In either instance, as soon as you release your mouse, the **New Annotation** dialog box will open. You can add a note in the Note box (this is optional). Next, click the **Create New Fact...** button.



4. The Send to CaseMap - New Fact dialog box will open, displaying fields from the Fact spreadsheet. Enter information in the fields provided, and click OK. Remember to use Short Names when referring to any persons or organizations. Click the Issue Linker to link the fact to relevant issues. If you wish to add fields to this dialog box, click Favorite Fields.



5. Notice that the new fact now appears in the Facts spreadsheet and is sorted according to the date.

Tue 09/19/2017	Philip Hawkins writes to William Lang to express his concern over being left out of key decisions.	Internal Memo: Salary Projections (Pg 1 an_id=	Wrongful Termination, Age Discrimination
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