

CaseMap ReportBook FAQ

1. What's a ReportBook?

- A ReportBook is a compilation of any number of CaseMap reports packaged with optional elements such as a Cover Page, a Table of Contents, and report-specific Title Pages.
- It takes just three mouse clicks to generate a ReportBook. ReportBooks can be printed or even PDFed using CaseMap 5's built-in PDF functionality.
- Each CaseMap 5 case file can contain an unlimited number of ReportBook Definitions. Each time you print or PDF a ReportBook, CaseMap creates it based on your selected ReportBook Definition and the most current case data.
- ReportBooks are a new feature in CaseMap 5. They are not available in earlier versions of CaseMap.

2. What are the components of a ReportBook?

- Every ReportBook includes one or more reports and a series of optional items. The optional items are: a Cover Page, a Confidentiality Statement, a Table of Contents, an Introduction, and report-specific Title Pages.
- Again, a ReportBook can contain an unlimited number of reports. For example, one ReportBook might include an Issue Outline, a Cast of Characters, a Chronology of Key Facts, and Document Index.
- A ReportBook can contain multiple reports based on one CaseMap spreadsheet. For example, a ReportBook can include five reports based on different views of case Facts and another five reports based on different views of case Objects.

3. What makes up a ReportBook report?

- The layout of a ReportBook report is similar to that of the report generated when you print one of CaseMap's spreadsheet views.
- A ReportBook report is composed of one or more columns of case data arranged in a desired sequence. The rows that appear in the report are listed based on your desired sort criteria. Finally, you can set a filter that permanently limits the rows displaying in the report to those meeting criteria you specify.
- As an example, you could create a ReportBook report format for case Facts that contains the Date & Time, Fact Text, and Sources fields; is sorted by Date & Time; and is filtered so that it displays only Key facts.

4. How is a ReportBook set up?

- You may find that there's little need to create your own ReportBook Definitions. Each CaseMap case file automatically includes five pre-built ReportBook Definitions that are waiting to be put to work. You'll find an explanation of the contents of each of these default ReportBooks in the topic below.
- When you want to define your own ReportBook layouts, you can create one from scratch or by copying an existing ReportBook and modifying it. Both options are available by selecting Manage ReportBooks on the ReportBook menu.
- When you create a ReportBook Definition that you would like to add to other case files, you can do so easily using the Export/Import ReportBook Definition feature under ReportBook Tools on the ReportBook menu.

5. What pre-built ReportBook Definitions does CaseMap set up automatically?

- When you click the ReportBook menu in any CaseMap 5 file, you'll find five pre-built ReportBook Definitions that you can put to work immediately. You can customize them as you wish and copy them to use as the starting point for additional ReportBook Definitions.

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- All five pre-built ReportBook Definitions include a Cover Page, a Confidentiality Statement, a Table of Contents, an Introduction, and report-specific Title Pages.
- Here's an explanation of the pre-built options:
- *Case Summary* -- Creates a ReportBook containing a report for each primary CaseMap spreadsheet. The default is for the reports to appear in the following order: Issues, Cast of Characters - Persons, Cast of Characters - Organizations, Fact Chronology, Document Index, Open Questions, Research - Authorities, Research - Authority Extracts.
- *Issues, Cast of Characters, Facts, Key Documents* -- Creates a ReportBook containing the four reports identified in its name.
- *Key Players, Facts, and Documents* -- Creates a ReportBook of three reports -- Key persons and organizations, Key facts, and Key documents.
- *Mark Me Up* -- Create this ReportBook to get your case analysis off to a fast start. After meeting with a new client, use your notes to create an initial cast of characters, document index and fact chronology in a new CaseMap file. Print Mark Me Up and you'll find it contains these three reports along with a special Introduction laying out steps for your client to complete to enhance your understanding of the new matter.
- *What's New in the Last Two Weeks* -- Creates a ReportBook including all new records entered in a case file in the two weeks prior to when the ReportBook is run. Please note that these reports include only new records, not updated ones.

6. Do changes made to CaseMap's spreadsheet views impact ReportBook reports?

- No. ReportBook reports are saved layouts that work independently from your spreadsheet views. This keeps changes to your spreadsheet from messing up your ReportBook report formats.
- For example, when you hide a field in your spreadsheet view, this doesn't change the fields displaying in your ReportBook reports. Similarly, if you filter your Fact spreadsheet down to just the critical facts, this filter has no bearing on what facts appear in any ReportBook reports run at that point.

7. How are ReportBook reports created?

- You can create ReportBook reports in one of three ways:
- A. Display the ReportBook Reports dialog box for a ReportBook to which you want to add a report, click New and follow the steps in the Report Wizard. (To display the ReportBook Reports dialog box: 1. Select Manage ReportBook on the ReportBook menu to display the Manage ReportBook dialog box. 2. Select a ReportBook to which you want to add a report and click Modify. 3. In the Customize ReportBook dialog box, click Reports.)
- B. Display the ReportBook Reports dialog box for a ReportBook to which you want to add a report, select an existing report that can serve as the starting place for the new report, click Copy, and then Modify the copied report.
- C. Try the method described below.

8. What's an easy way to create a ReportBook report?

- Use the Create Report from Current View feature you'll find on the ReportBook Tools option on the ReportBook menu.
- To use this feature, arrange your spreadsheet view as you want your ReportBook report to appear, e.g., add, remove, and reposition spreadsheet fields. Run an Instant Search to filter the report if desired.

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- Once your spreadsheet view is set up the way you want your ReportBook report to be, use the Create Report from Current View option. This adds a new report based on your spreadsheet set up to a ReportBook of your choosing.
- It's important to note that when you use the Create Report from Current View feature you're taking a one-time snapshot of the spreadsheet view and using that to create the ReportBook report. Any change you make to the spreadsheet after using the Create Report from Current View option has no impact on the ReportBook report you created using this feature.

9. Are the ReportBooks in a case file shared?

- Yes. The Manage ReportBooks dialog box lists the ReportBook Definitions created by all users of the case file. The author of each ReportBook is identified next to its name.

10. What does CaseMap do if there's no data for a ReportBook report?

- CaseMap skips ReportBook reports that contain no data. If one or more reports are skipped when a ReportBook is generated, CaseMap displays an informational message alerting you to this fact. If you're using a Table of Contents in the ReportBook, it's automatically adjusted so that it references only those reports that remain.
- Why would there be no data for a report? This can occur both when a case is getting started and also when you have filters tied to a report and no data survives the filtering process. For example, each CaseMap file includes a pre-built ReportBook called What's New in the Last Two Weeks. This ReportBook prints a report of the items that have been added to every CaseMap spreadsheet in the last two weeks. Well, what if nothing has been added to some of the spreadsheets? They're skipped.

11. Should a ReportBook only be given to clients or other team members when the information in it is perfect?

- Heck, no! Make sure clients and everyone else on the trial team realize that ReportBooks are living documents that provide a way for the team to collaborate on the case analysis process. The data in ReportBook reports will change substantially over time and every ReportBook will no doubt contain "mistakes." ReportBooks are picks and shovels, not porcelain for the display cabinet. We've set up a default Introduction for each ReportBook that communicates this concept.

12. What's the best way to learn more about the ReportBook feature?

- Put it to work! We'd recommend you open the Hawkins example case and complete the following three steps using options on the ReportBook menu.
- 1. Print each ReportBook in the Hawkins case and study the resulting work product. You'll become familiar with the pieces that make up a ReportBook, learn about the pre-built ReportBooks that are available in each case, and gain an understanding of the default style settings that are applied automatically when you create your own ReportBooks from scratch.
- 2. Open the Manage ReportBook dialog box, select a ReportBook, and click the Modify button to display the Customize ReportBook dialog box. In the Customize ReportBook dialog box, you'll see buttons for each of the major sections that compose a ReportBook, i.e., Title Page, Confidentiality Statement, Table of Contents, Introduction, Reports, and Options. Click each of these buttons and study the dialog box that displays. Spend the majority of your time studying the ReportBook Reports dialog box.
- 3. Open the Manage ReportBook dialog box and click the New button. Follow the steps in the New ReportBook wizard to create a ReportBook from scratch. Don't worry about creating a masterpiece. You can always delete the ReportBook you created as part of this experiment.