

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients;

Subject: CRITICAL: iOS 16.4.1 Mandatory Update for GFE iPhone/iPad devices

Date: Wed, 12 Apr 2023 14:28:15 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

All,

iOS 16.4.1 must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed by **COB Tuesday, April 18, 2023.**

To complete the installation:

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Attached are instructions on how to complete the iOS update on your own. **We recommend you try this update from home FIRST. If your update is not successful,** please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help

(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients,;

Subject: CRITICAL: iOS 16.5 Mandatory Update for GFE iPhone/iPad devices

Date: Wed, 24 May 2023 14:10:00 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

Please complete the below ASAP.

iOS **16.5** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed by **COB Tuesday, June 6, 2023.**

To complete the installation:

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Failure to perform the required upgrade to 16.5 by may result in temporary loss of access to **OUTLOOK and VPN (Virtual Private Network).**

Attached are instructions on how to complete the iOS update on your own. **We recommend you try this update from home FIRST. If your update is not successful,** please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help
(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients,;

Subject: FW: iOS 16.6.1 Mandatory Update for GFE iPhone/iPad devices

Date: Tue, 12 Sep 2023 09:52:54 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

Due to the severity of the exploitation, ALL iOS devices must be updated to iOS 16.6.1 by Thursday September 14, 2023.

From: USADC-Helpdesk

Sent: Friday, September 8, 2023 1:55 PM

Subject: iOS 16.6.1 Mandatory Update for GFE iPhone/iPad devices

Importance: High

Please complete the below ASAP.

iOS **16.6.1** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed by **COB Friday, September 15, 2023.**

To complete the installation:

We recommend you try this update from home FIRST.

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Failure to perform the required upgrade to 16.6.1 by the date specified will result in temporary loss of access to OUTLOOK and VPN (Virtual Private Network).

Attached are instructions on how to complete the iOS update on your own. **If your update is not successful**, please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help

(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients,;

Subject: CRITICAL: iOS 16.5 Mandatory Update for GFE iPhone/iPad devices

Date: Fri, 02 Jun 2023 09:54:48 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

Please complete the below ASAP.

iOS **16.5** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed by **COB Tuesday, June 6, 2023.**

To complete the installation:

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Failure to perform the required upgrade to 16.5 by may result in temporary loss of access to **OUTLOOK and VPN (Virtual Private Network).**

Attached are instructions on how to complete the iOS update on your own. **We recommend you try this update from home FIRST. If your update is not successful,** please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help
(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients,;

Subject: CRITICAL: iOS 16.5 Mandatory Update for GFE iPhone/iPad devices

Date: Tue, 23 May 2023 14:12:00 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

Please complete the below ASAP.

iOS **16.5** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed by **COB Tuesday, June 6, 2023.**

To complete the installation:

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Failure to perform the required upgrade to 16.5 by may result in temporary loss of access to **OUTLOOK and VPN (Virtual Private Network).**

Attached are instructions on how to complete the iOS update on your own. **We recommend you try this update from home FIRST. If your update is not successful,** please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help
(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: USADC-All Employees <(b) (6)>

Subject: MANDATORY UPDATE: BIOS Laptop Update

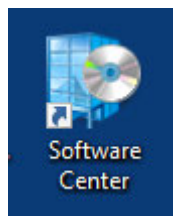
Date: Tue, 21 Feb 2023 14:18:42 -0500

Importance: Normal

Inline-Images: image002.png

Hello All,

EOUSA has pushed a mandatory BIOS update that must be completed before February 27, 2023. We recommend completing the update manually before the deadline to avoid any possible interruptions to your laptop access. Please follow the instructions below:



1. Open Software Center on your desktop
2. Select "HP 640 G5 BIOS Update R72 01.22 – Update BIOS – POST"
3. Click Install

Tips for success:

- The update will take up to 30 minutes in the office, up to 45 minutes remotely.
- **Leave the laptop connected to power until update is fully completed (docking station or travel charger).**
- The laptop will restart multiple times before completing, do not interrupt update by pressing the power button.
- Complete update before 2/27 to avoid interruptions by force update.
- Save all work prior to starting update

Thanks,
Help Desk

(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients::

Subject: CRITICAL: iOS 16.4.1 Mandatory Update for GFE iPhone/iPad devices

Date: Wed, 19 Apr 2023 09:23:54 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

All,

Please complete the below ASAP.

iOS **16.4.1** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed **by COB Tuesday, April 18, 2023.**

To complete the installation:

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Failure to perform the required upgrade to 16.4.1 by Tuesday April 18th may result in temporary loss of access to email and VPN (Virtual Private Network).

Attached are instructions on how to complete the iOS update on your own. **We recommend you try this update from home FIRST. If your update is not successful,** please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help

(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients,;

Subject: iOS 17.1 Critical Update for GFE iPhone/iPad devices

Date: Thu, 02 Nov 2023 09:37:40 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

On November 1, 2023, the Justice Security Operations Center (JSOC) advised DOJ components of a critical vulnerability within iOS devices 17.0.3 or lower. Due to the severity of the exploitation, ALL iOS devices must be updated to iOS 17.1

Please complete the below ASAP.

iOS **17.1** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed by **COB Wednesday November 8, 2023.**

To complete the installation:

We recommend completing update from home FIRST.

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Failure to perform the required upgrade to 16.6 by the date specified will result in temporary loss of access to OUTLOOK and VPN (Virtual Private Network).

Attached are instructions on how to complete the iOS update on your own. **If your update is not successful**, please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help
(b) (6)

From: (b)(6) USADC Help Desk

To: (b)(6), (b)(7)(c) - (Matthew Burke's email address)

Subject: New request opened for: 158552, FW: CRITICAL: iOS 16.3.1 Update Approved for GFE iPhone/iPad devices

Date: Tue, 21 Feb 2023 09:04:45 -0500

Importance: Normal

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

***** Reply to this email to append information to [[WO#158552]] *****

Hello (b)(6), (b)(7)(c) - (Matthew Burke's email address)

We've created a work order on your behalf and given it an ID number of 158552.

If you have any additional information for us or would like to inquire about status information, please use this ID number for our reference.

Thank you.

Sincerely,

USADC Help Desk

(b) (6)

NOTE: This mailbox is not attended by a person and replies or anything starting with "RE:" in the subject line will NOT generate a ticket. If you need additional help please start a brand new message or call the helpdesk directly. Messages left on the helpdesk voicemail will generate a new help ticket and a technician will be assigned to your inquiry.

Helpdesk Self-Service Page:

<https://districtprd.usa.doj.gov/district/DC/Wiki%20Pages/dc/divisions/admin/it/helpdesk/newpc/index.aspx>

[Click on this link to submit additional information related to this Work Order.](#)

[Click on this link to request an updated status for this Work Order.](#)

[Click on this link to request an updated status for all of your recent Work Orders.](#)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients.;

Subject: iOS 16.6.1 Mandatory Update for GFE iPhone/iPad devices

Date: Fri, 08 Sep 2023 13:54:32 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

Please complete the below ASAP.

iOS **16.6.1** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed by **COB Friday, September 15, 2023.**

To complete the installation:

We recommend you try this update from home FIRST.

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Failure to perform the required upgrade to 16.6.1 by the date specified will result in temporary loss of access to OUTLOOK and VPN (Virtual Private Network).

Attached are instructions on how to complete the iOS update on your own. **If your update is not successful**, please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help

(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: "USADC-iOS Users (USA)" <(b) (6)>

Subject: CRITICAL: iOS 16.3.1 Update Approved for GFE iPhone/iPad devices

Date: Fri, 17 Feb 2023 11:17:32 -0500

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

All,

iOS **16.3.1** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed **by COB Thursday, February 23, 2023**.

Failure to perform the required upgrade to 16.3.1 by Thursday February 23rd will result in temporary loss of access to email and VPN (Virtual Private Network).

To complete the installation:

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select "General"
- Select "Software Update"
- Select "Download and Install"
- Enter device unlock passcode

Attached are instructions on how to complete the iOS update on your own.

Please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) if you have any questions or concerns.

DC Help

(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients,;

Subject: iOS Security Response 16.4.1 (a) UPDATE GFE All Apple iOS Devices and Users

Date: Tue, 09 May 2023 07:17:56 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

All,

Please complete the latest iOS Security Response **16.4.1 (a)** update on all GFE iOS iPhone and/or iPad device.

To complete the installation:

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Attached are instructions on how to complete the iOS update on your own. **We recommend you try this update from home FIRST. If your update is not successful,** please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help
(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients::

Subject: Please complete by COB 10/4/2023 - iOS 17.0.1 Critical Vulnerability Update for GFE iPhone/iPad devices

Date: Sat, 30 Sep 2023 08:33:53 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

Please complete the below ASAP.

iOS **17.0.1** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed **by COB Wednesday, October 4, 2023**

To complete the installation:

We recommend you try this update from home FIRST.

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Failure to perform the required upgrade to 17.0.1 by the date specified will result in temporary loss of access to OUTLOOK and VPN (Virtual Private Network).

Attached are instructions on how to complete the iOS update on your own. **If your update is not successful**, please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help
(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients,;

Subject: iOS 16.6 Mandatory Update for GFE iPhone/iPad devices

Date: Wed, 26 Jul 2023 12:43:51 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

Please complete the below ASAP.

iOS **16.6** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed by **COB Wednesday August 2, 2023.**

To complete the installation:

We recommend you try this update from home FIRST.

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Failure to perform the required upgrade to 16.6 by the date specified will result in temporary loss of access to OUTLOOK and VPN (Virtual Private Network).

Attached are instructions on how to complete the iOS update on your own. **If your update is not successful**, please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help

(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: "USADC-iOS Users (USA)" <(b) (6)>

Subject: CRITICAL: iOS 16.3.1 Update Approved for GFE iPhone/iPad devices

Date: Thu, 16 Feb 2023 11:23:45 -0500

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

All,

iOS **16.3.1** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed by **COB Thursday, February 23, 2023**.

To complete the installation:

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select "General"
- Select "Software Update"
- Select "Download and Install"
- Enter device unlock passcode

Attached are instructions on how to complete the iOS update on your own.

Please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) if you have any questions or concerns.

DC Help
(b) (6)

From: (b)(6), (b)(7)(C) per EOUSA (USADC)" <(b) (6)>

To: Undisclosed recipients.;

Subject: RE: W:\, Z:\ Incident: some folders impacted: data from 8/10-8/27

Date: Tue, 12 Sep 2023 15:30:32 -0400

Importance: Normal

Inline-Images: image001.png; image002.png

Update: we anticipate that the software we've purchase to address this situation will be available this Thursday. After some initial work, we will have a sense of the estimated restore time.

If you have an urgent need for files that are currently inaccessible from the 8/10-8/27 period, please speak with your supervisor who can then contact me about options.

Thank you,

(b)(6), (b)(7)(C)

(b)(6), (b)(7)(C) per EOUSA

Chief Information Officer

Information Technology Division

United States Attorney's Office for the District of Columbia

O: (b) (6)

C: (b) (6)

(b) (6)

From: (b)(6), (b)(7)(C) per EOUSA (USADC)" <(b) (6)>

Sent: Friday, September 1, 2023 8:06 AM

Subject: W:\, Z:\ Incident: some folders impacted: data from 8/10-8/27

All,

We recently had an incident with our storage infrastructure that supports the W:\ and Z:\ drives. (b)(7)(E) per EOUSA

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

Thank you,

(b)(6), (b)(7)(C)

(b)(6), (b)(7)(C) per EOUSA

Chief Information Officer
Information Technology Division
United States Attorney's Office for the District of Columbia

O: (b) (6)

C: (b) (6)

(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients.;

Subject: CRITICAL: iOS 16.4.1 Mandatory Update for GFE iPhone/iPad devices

Date: Mon, 17 Apr 2023 07:10:02 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

All,

iOS **16.4.1** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed by **COB Tuesday, April 18, 2023.**

To complete the installation:

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Failure to perform the required upgrade to 16.4.1 by Tuesday April 18th may result in temporary loss of access to email and VPN (Virtual Private Network).

Attached are instructions on how to complete the iOS update on your own. **We recommend you try this update from home FIRST.** If your update is not successful, please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help
(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients.;

Subject: CRITICAL: iOS 16.5 Mandatory Update for GFE iPhone/iPad devices

Date: Wed, 31 May 2023 08:35:10 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

Please complete the below ASAP.

iOS **16.5** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed by **COB Tuesday, June 6, 2023.**

To complete the installation:

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Failure to perform the required upgrade to 16.5 by may result in temporary loss of access to **OUTLOOK and VPN (Virtual Private Network).**

Attached are instructions on how to complete the iOS update on your own. **We recommend you try this update from home FIRST. If your update is not successful,** please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help
(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients::

Subject: Please complete by COB 10/4/2023 - iOS 17.0.1 Critical Vulnerability Update for GFE iPhone/iPad devices

Date: Thu, 28 Sep 2023 08:32:45 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

Please complete the below ASAP.

iOS **17.0.1** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed **by COB Wednesday, October 4, 2023**

To complete the installation:

We recommend you try this update from home FIRST.

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Failure to perform the required upgrade to 16.6.1 by the date specified will result in temporary loss of access to OUTLOOK and VPN (Virtual Private Network).

Attached are instructions on how to complete the iOS update on your own. **If your update is not successful**, please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help
(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients;

Subject: REMINDER iOS 17.1 Critical Update for GFE iPhone/iPad devices

Date: Mon, 06 Nov 2023 07:22:35 -0500

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

On November 1, 2023, the Justice Security Operations Center (JSOC) advised DOJ components of a critical vulnerability within iOS devices 17.0.3 or lower. Due to the severity of the exploitation, ALL iOS devices must be updated to iOS 17.1

Please complete the below ASAP.

iOS **17.1** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed by **COB Wednesday November 8, 2023.**

To complete the installation:

We recommend completing update from home FIRST.

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Failure to perform the required upgrade to 16.6 by the date specified will result in temporary loss of access to OUTLOOK and VPN (Virtual Private Network).

Attached are instructions on how to complete the iOS update on your own. **If your update is not successful**, please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help
(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients,;

Subject: iOS 16.6.1 Mandatory Update for GFE iPhone/iPad devices

Date: Tue, 12 Sep 2023 07:16:27 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

From: USADC-Helpdesk

Sent: Friday, September 8, 2023 1:55 PM

Subject: iOS 16.6.1 Mandatory Update for GFE iPhone/iPad devices

Importance: High

Duplicative Records

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients;;

Subject: CRITICAL: iOS 16.4.1 Mandatory Update for GFE iPhone/iPad devices

Date: Thu, 13 Apr 2023 07:18:15 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

All,

iOS **16.4.1** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed by **COB Tuesday, April 18, 2023.**

To complete the installation:

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Failure to perform the required upgrade to 16.4.1 by Tuesday April 18th may result in temporary loss of access to email and VPN (Virtual Private Network).

Attached are instructions on how to complete the iOS update on your own. **We recommend you try this update from home FIRST.** If your update is not successful, please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help
(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: "USADC-iOS Users (USA)" <(b) (6)>

Subject: CRITICAL: iOS 16.3.1 Update Approved for GFE iPhone/iPad devices

Date: Wed, 22 Feb 2023 07:15:09 -0500

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

All,

iOS **16.3.1** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed **by COB Thursday, February 23, 2023.**

To complete the installation:

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select "General"
- Select "Software Update"
- Select "Download and Install"
- Enter device unlock passcode

Attached are instructions on how to complete the iOS update on your own.

Please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) if you have any questions or concerns.

DC Help
(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: Undisclosed recipients::

Subject: FW: CRITICAL: iOS 16.4.1 Mandatory Update for GFE iPhone/iPad devices

Date: Tue, 18 Apr 2023 07:20:23 -0400

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

All,

iOS **16.4.1** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed by **COB Tuesday, April 18, 2023.**

To complete the installation:

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select “General”
- Select “Software Update”
- Select “Download and Install”
- Enter device unlock passcode

Failure to perform the required upgrade to 16.4.1 by Tuesday April 18th may result in temporary loss of access to email and VPN (Virtual Private Network).

Attached are instructions on how to complete the iOS update on your own. **We recommend you try this update from home FIRST.** If your update is not successful, please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) to schedule an appointment to complete the update.

DC Help
(b) (6)

From: (b)(6), (b)(7)(C) per EOUSA (USADC)" <(b) (6)>

To: Undisclosed recipients.;

Subject: RE: Please complete by COB 10/4/2023 - iOS 17.0.1 Critical Vulnerability Update for GFE iPhone/iPad devices

Date: Thu, 28 Sep 2023 09:12:56 -0400

Importance: Normal

All,

This is in response to another first-day exploit, which is why it's on a fast timeline.

Too, iOS 17 has a number of changes to look, feel, and user interface (eg, the mute and speaker button are switched on the in-call screen – I don't find this annoying at all). So gird yourself for new experiences.

Thanks,

(b)(6), (b)(7)(C)

(b)(6), (b)(7)(C) per EOUSA

Chief Information Officer

Information Technology Division

United States Attorney's Office for the District of Columbia

O: (b) (6)

C: (b) (6)

(b) (6)

From: USADC-Helpdesk <(b) (6)>

Sent: Thursday, September 28, 2023 8:33 AM

Subject: Please complete by COB 10/4/2023 - iOS 17.0.1 Critical Vulnerability Update for GFE iPhone/iPad devices

Importance: High

Duplicative Records

From: USADC-Helpdesk <(b) (6)>

To: "USADC-iOS Users (USA)" <(b) (6)>

Subject: FINAL REMINDER - CRITICAL: iOS 16.3.1 Update Approved for GFE iPhone/iPad devices

Date: Thu, 23 Feb 2023 07:19:43 -0500

Importance: High

Attachments: 2023_Instructions_on_how_to_update_your_iOS_devices.pdf

All,

iOS **16.3.1** must be installed on your GFE iOS iPhone and/or iPad device. It is critical this update is completed **by COB Thursday, February 23, 2023.**

To complete the installation:

- Plug device into charger before beginning update
- Connect to Wi-Fi
- Go to settings
- Select "General"
- Select "Software Update"
- Select "Download and Install"
- Enter device unlock passcode

Attached are instructions on how to complete the iOS update on your own.

Please don't hesitate to contact the DC Help Desk at (b) (6) or (b) (6) if you have any questions or concerns.

DC Help
(b) (6)

From: USADC-Helpdesk <(b) (6)>

To: USADC-All Employees <(b) (6)>

Subject: MANDATORY UPDATE: BIOS Laptop Update

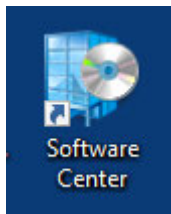
Date: Wed, 22 Feb 2023 08:52:48 -0500

Importance: Normal

Inline-Images: image002.png

Hello All,

EOUSA has pushed a mandatory BIOS update that must be completed before February 27, 2023. We recommend completing the update manually before the deadline to avoid any possible interruptions to your laptop access. Please follow the instructions below:



1. Open Software Center on your desktop
2. Select "HP 640 G5 BIOS Update R72 01.22 – Update BIOS – POST"
3. Click Install

Tips for success:

- The update will take up to 30 minutes in the office, up to 45 minutes remotely.
- **Leave the laptop connected to power until update is fully completed (docking station or travel charger).**
- The laptop will restart multiple times before completing, do not interrupt update by pressing the power button.
- Complete update before 2/27 to avoid interruptions by force update.
- Save all work prior to starting update

Thanks,
Help Desk

(b) (6)

From: "Brady, Daniel (JMD)" <(b) (6)>

To: (b)(6), (b)(7)(c) - (Maria Vento's email address)

Cc: JMD_ServiceNow <(b) (6)>, "DOJ Service Desk Mobility Support" <(b) (6)>

Subject: RE: SCTASK4015919 Turning on Face ID after travel

Date: Mon, 18 Mar 2024 09:37:11 -0400

Importance: Normal

(b)(6), (b)(7)(c)

The travel profile has been, successfully, removed from your device. If you need to turn your Face ID (or Touch ID) back on. You can do so by doing the following:

1. Go to Settings
2. Go to Face ID & Passcode (or Touch ID) & Passcode
3. Enter your Passcode
4. Turn on the Face ID (or Touch ID) feature

And please update the **IOS** at **Settings-General-Software Update** (if needed).

Have a good day.

Daniel Brady
SDS 4E.1002
145 N. Street, NE Washington, DC

(b) (6) {2C6N}
(b) (6) {cell}

From: (b) (6), (b) (7)(C)

To: (b)(6), (b)(7)(c) - (Karen Drolet's email address)

Subject: FW: Axon Investigate software

Date: Tue, 18 Jul 2023 15:42:26 -0400

Importance: Normal

I've made the changes that I captured during the meeting, so you can take a shot at the [policy](#) now.

From: (b)(6), (b)(7)(c) - (Ariel McIntyre's email address)

Sent: Thursday, July 13, 2023 10:28 AM

To: (b)(6), (b)(7)(c) - (Karen Drolet's email address); (b) (6), (b) (7)(C)

Cc: (b) (6), (b) (7)(C)

Subject: RE: Axon Investigate software

Here is the current process as outlined in the approved procurement policy. Is this the process we are following here? As Jack mentioned in our budget briefing, he supports more strict requirements than DOJ's standard policies. While this needs to be revised to account for changes in the PCTF, we will have to defend not following the process below if we deviate from it prior to revising the policy. I'm not ok with that.

***Purchase Process:** A SCO staff member initiates the procurement request by informing a PCH of the need. A PCH researches the request, completes sections 1-3 of the PCTF, and submits it to the Allotee, Budget Officer, and Financial Specialist. The Financial Specialist either 1) obligates funds using a pre-existing bulk commitment or 2) if no bulk commitment exists, a) creates a commitment that the Budget Officer electronically approves and b) obligates funds. Concurrently, the Allotee approves or denies the request. Once the Allotee approves and funds are obligated, the Budget Officer signs the PCTF, which locks the financial information and prevents future changes, and notifies the PCH to complete the purchase.*

Thanks!

Ariel

This message is intended for official use and may contain SENSITIVE information. If this message contains SENSITIVE information, it should be properly delivered, labeled, stored, and disposed of according to policy.

From: (b)(6), (b)(7)(c) - (Karen Drolet's email address)

Sent: Thursday, July 13, 2023 9:01 AM

To: (b)(6), (b)(7)(c) - (Ariel McIntyre's email address); (b) (6), (b) (7)(C)

Cc: (b) (6), (b) (7)(C)

Subject: FW: Axon Investigate software

Importance: High

Good morning,

Axon software purchase form is signed [here](#).

Ariel, please let me know if you have questions. If not, please sign for the purchase.

Thanks,

(b)(6), (b)(7)(C)

This message is intended for official use and may contain SENSITIVE information. If this message contains SENSITIVE information, it should be properly delivered, labeled, stored, and disposed of according to policy.

From: (b) (6), (b) (7)(C)
Sent: Wednesday, July 12, 2023 4:18 PM
To: (b)(6), (b)(7)(c) - (Karen Drolet's email address)
Cc: (b)(6), (b)(7)(c) - (Ariel McIntyre's email address); (b) (6), (b) (7)(C)
Subject: FW: Axon Investigate software
Importance: High

Here's the link [PCTF for Axon](#) for approval. Thanks,

From: (b) (6), (b) (7)(C)
Sent: Wednesday, July 12, 2023 3:25 PM
To: (b) (6), (b) (7)(C)
Subject: FW: Axon Investigate software
Importance: High

From: Alston, Keith (JMD) <(b) (6)>
Sent: Wednesday, July 12, 2023 11:24 AM
To: (b) (6), (b) (7)(C); (b) (6), (b) (7)(C); (b) (6), (b) (7)(C); Alkire, Dee A. (JMD)
<(b) (6)>; Yun, Jun (JMD) <(b) (6)>; Feliciano, Damian R. (JMD)
<(b) (6)>
Subject: FW: Axon Investigate software
Importance: High

Duplicative Records

From: (b) (6), (b) (7)(C)

To: (b) (6), (b) (7)(C), (b) (6), (b) (7)(C)

Subject: RE: TextMap

Date: Mon, 01 May 2023 12:37:34 -0400

Importance: Normal

Attachments: Using_TextMap.pdf

(b) (6), (b) (7)(C)

See attached user guide and [link](#) for a few short training videos.

Regards,

(b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

From: (b) (6), (b) (7)(C)

Sent: Monday, May 1, 2023 12:22 PM

To: (b) (6), (b) (7)(C)

Subject: TextMap

Hello Team!

Happy Monday! Are there some general instructions about how to use TextMap that exist somewhere? I find TextMap super useful, and it seems like maybe not everyone uses it on the CDI side of the house, so I would love to circulate some instructions, if those exist. Let me know!

(b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

(b) (6), (b) (7)(C)

United States Department of Justice

Using TextMap

User Guide

TextMap®, Version 9.1

- **Navigating TextMap**
- **Getting Started**
- **Working with Cases**
- **Creating Case Issues**
- **Importing Data**
- **Working with Transcripts**
- **Using the TextMap App for iPad**
- **Sorting Data**
- **Filtering Data**
- **Searching Data**
- **Annotating Transcripts**
- **Working with Exhibits**
- **Working with Video**
- **Editing Data**
- **Creating and Printing Reports**
- **Exporting Data**
- **Keyboard Shortcuts**

TextMap User Guide

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CaseMap®
CaseMap® Server
TextMap®
TimeMap®
NoteMap®
DepPrep®
Sanction®
Concordance®

Version: TextMap® 9.1
Release Date: February 28, 2017

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Using TextMap

User Guide

About TextMap

Chapter

1

About TextMap

TextMap transcript management software helps you easily manage your transcripts in an electronic format. Each electronic transcript you import — case deposition, examination or other proceeding — to TextMap is created as a database so you can efficiently search, annotate, add notes, create summary reports or cull key transcript passages.

[Share case access to ensure efficiency](#)

TextMap cases can be used by multiple case staff — at the same time. The case created should be stored in a shared location on your network to ensure that all users can access it. In this manner, all case users are able to work together to reviewing, searching and annotating transcripts.

[Get started using TextMap](#)

To get started using TextMap, we offer a variety of resources for you to familiarize yourself with the software:

- You can safely experiment with TextMap's features using our example case, [Hawkins vs Anstar](#).
- You can print the [TextMap Quick Reference Card](#).
- You can follow the steps in the [Quick Start Tutorial](#) to create your own practice case or start a new one for a client.
- You can also sign up for TextMap On Demand training and learn how to use TextMap's primary features in a guided web-based training course that you can take at your own pace. Visit the [LexisNexis University](#) to register online today.

[Learn what's new in TextMap](#)

TextMap continues to bring new and exciting features that make it work smarter and harder. Take time to review recent release updates and familiarize yourself with the new tools and features that give you an advantage in transcription management.

For more information, see [What's New in TextMap](#).

Related Topics

- [What's New in TextMap](#)
- [About the Getting Started pane](#)
- [Practicing with sample data](#)
- [Using the Quick Start Tutorial](#)

Using TextMap

User Guide

What's New in TextMap

Chapter

2

What's New in TextMap

The following enhancements are included in the TextMap version 9 release.

TextMap 9.0

Include source when copying transcript text

TextMap now provides a new clipboard option to include the citation source when copying transcript text.

See [Copying data](#) for additional information.

Enhanced video clip export to PowerPoint

TextMap has added new video output options for users to export video clips to multiple formats and positions.

See [Exporting video clips](#) for additional information.

Bulk link exhibits to selected transcript

TextMap now provides a way to bulk link new or existing exhibits to the transcript.

See [Linking exhibits to transcripts](#) for additional information.

Redact sensitive information from transcript text

TextMap now provides a redaction tool to redact confidential and sensitive information.

See [About redactions](#) for additional information.

Create annotation from partial transcript text

TextMap now provides a way to annotate partial lines of a transcript. See [Creating annotations](#) for additional information.

Export video clips to MP4 format

TextMap now provides a way to export video clips to MP4 format. See [Exporting video clips](#) for additional information.

Import PDF transcripts

TextMap has added an option to import pdf transcripts. See [About importing data](#) and [Importing transcripts](#) for additional information.

View annotation linked issue color bars in transcript viewer

TextMap now provides a way to easily identify issues coded for annotation within the transcript text. See [About annotations](#) and [Creating annotations](#) for additional information.

For more release information, see the Release Notes.

Related Topics

[About TextMap](#)

Release Notes

Using TextMap

User Guide

Using TextMap

Chapter

3

Using TextMap

Navigating TextMap

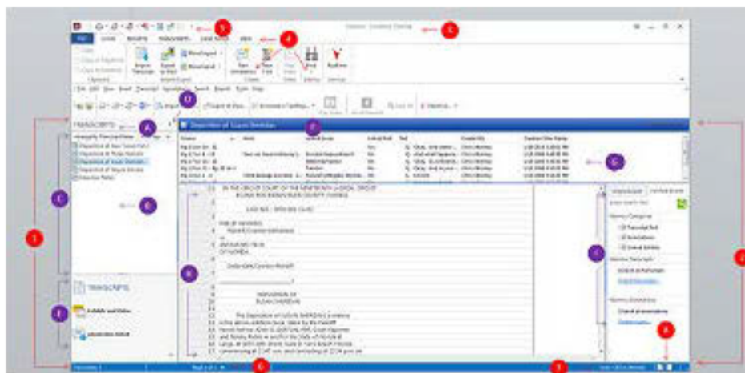
Navigating TextMap

TextMap's user interface is designed so your transcript data displays in the primary workspace pane (2) for maximum viewing. This workspace pane (2) is where you will search transcripts, enter and track annotations, issues, notes, linked exhibits and documents, and review video depositions in individual transcripts. To move quickly between each transcript, you will use the Navigation pane (1) on the left side of the application. The Navigation pane (1) has three interchangeable panes: Transcripts, Exhibits and Video, and Annotation Detail. Each pane is then divided into task panes containing different tools for working with transcripts.

When you are working in a case, use the Transcripts pane to access transcripts. In the Exhibits and Video pane, you can view video depositions, link exhibits, and view linked exhibits and other documents. Use the Annotation pane to review an annotation's properties, notes, and linked issues, as well as send facts to CaseMap, review linked CaseMap fact details, and open linked CaseMap facts in CaseMap.

Use the Search pane to run basic keyword searches and full-text searches. The Full Text Search tab allows you to narrow your search by categories and limit your search to selected transcripts and/or case issues.

The tools you need to search, sort, edit, and analyze data as well as create reports are primarily performed by clicking on the ribbons or clicking on commands in the TextMap drop-down menus. All administrative tasks are located on TextMap menus.



 You can print a hard copy of the TextMap user interface and number key by printing the [TextMap Quick Reference Card](#).

To view the number key

1. Navigation Pane

The Navigation pane runs vertically along the left side of TextMap and provides access to three different panes: Transcripts, Exhibits and Video, and Annotation Detail. Click on the buttons at the bottom of the Navigation pane to access each set of tools.

A. Task Pane Name

Displays the name of the pane that is currently open in the Navigation pane.

B. Transcripts Pane

Contains the names of the transcripts imported into the TextMap case. Displays at the top of each pane. Transcripts can be sorted by name, transcript date, or import date, and can be sorted in ascending or descending order.

C. Task Pane

Displays task panes for performing tasks specific to the selected pane. For example, the Exhibits and Video pane contains the Exhibit Tasks and Exhibits task panes.

D. Minimize

Allows you to minimize the Navigation pane to expand the Transcript window for better viewing.

E. Navigation Buttons

Opens the task panes available within the Navigation pane.

2. Workspace

Displays the case transcripts, annotations, and the Search pane.

F. Transcript Name

Contains the name of the transcript currently selected in the Transcripts pane.

G. Annotation Pane

Lists the annotations within the transcript currently selected in the Transcripts pane.

H. Transcript Window

Displays the transcript currently selected in the Transcripts pane.

I. Search Pane

Allows you to run keyword searches and full-text searches on transcripts within a case. Contains the Word Search and Full Text Search tabs.

3. Title Bar

The Title bar displays the name of the case currently open in TextMap.

4. Ribbons

The Ribbons (Home, Reports, Transcripts, Case Tools, and View) contains menu items and other commands for performing TextMap tasks.

Two additional ribbons (Text & Video Tools and the Search Tools ribbons) contains menus and buttons for Annotation management, and for opening and navigating search

hits. See [About TextMap menus](#) for additional information.

5. Quick Access Tool Bar

The TextMap Quick Access toolbar can be customized to add and/or remove buttons/ functionality. By default, the toolbar displays the most commonly used buttons.

-  The Quick Access Toolbar can be displayed above or below the TextMap ribbon by selecting the 'Show Quick Access Toolbar Below the Ribbon' option when customizing the toolbar.

6. Transcript Status Bar

Displays transcript status information, such as the current transcript and page count, and the current cursor location within the Transcript window.

7. Case Staff User

Displays the name of the user currently logged on to TextMap.

8. Index and OCR Status Icons

Displays the current indexing and optical character recognition (OCR) processing status.

Related Topics

[About the Navigation pane](#)

[Modifying Navigation pane display](#)

[About TextMap menus](#)

About the Navigation pane

The Navigation pane is a vertical pane located on the left side of your screen when you open a case in TextMap. TextMap's Navigation pane has three task panes. The default setup is to display the Transcripts pane. The Transcripts pane allows you to easily transfer from working in one case transcript to another. The Transcripts list is displays at the top of each pane.

TextMap's Navigation Pane	
Elements	Description
Transcripts	Use to navigate between case transcripts in TextMap.
Exhibits and Video	Use to navigate between case transcripts in TextMap, view videos synchronized with transcripts, link exhibits to transcripts, and view exhibits

TextMap's Navigation Pane

and other documents linked to the selected transcript.

Annotation Detail

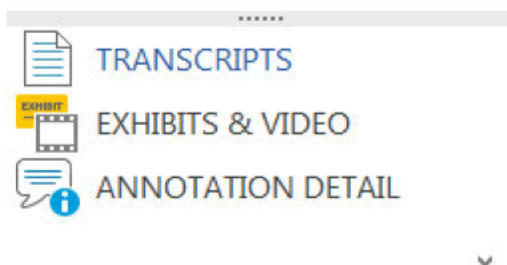
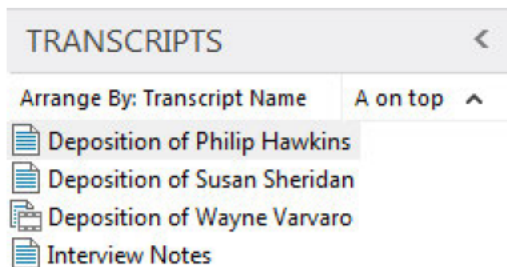
Use to review the selected annotation's properties, notes, and linked issues, edit the selected annotation, send facts to CaseMap, review linked CaseMap fact details, and open linked CaseMap facts in CaseMap.

Arrow Button

Use to show/hide pane buttons to maximize viewing within the Navigation pane.

Transcripts pane

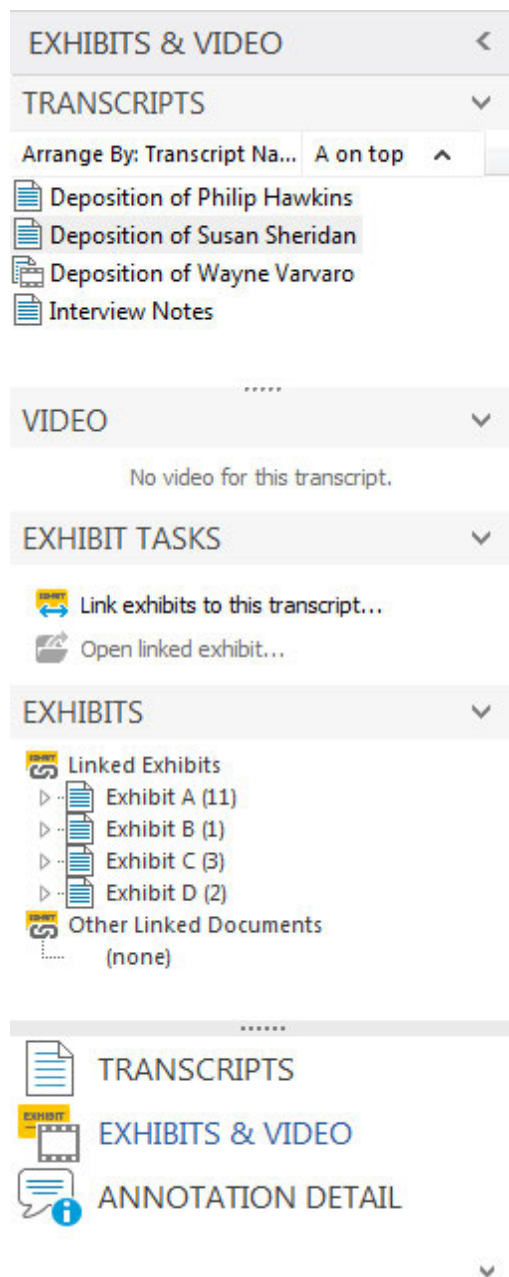
The Transcripts pane allows you to navigate between transcripts or transcript groups within a case. By default, transcripts are listed in alphabetical order by transcript name. Click the Arrange By button to choose whether transcripts are sorted by transcript name, transcript date, or import date. Click the Sort button to the right of the Arrange By button to toggle between sorting transcripts from ascending order or descending order.



Exhibits and Video pane

The Exhibits and Video pane has four task panes:

- **Transcripts pane** — Allows you to navigate between transcripts or transcript groups within a case.
- **Video pane** — Allows you to play the video depositions that are synchronized with the selected transcript.
- **Exhibit Tasks pane** — Allows you to link exhibits to the selected transcript and view exhibits and other documents linked to the selected transcript. Exhibits can be files on your computer, Web addresses, and custom links to other document management programs. The Open linked document feature is enabled when a linked exhibit or other linked document is selected in the Exhibits pane.
- **Exhibits pane** — Displays the exhibits and other documents linked to the selected transcript, includes links to where the exhibits and documents are linked within the transcript. Allows you to navigate to the exhibit and document links within the transcript by clicking the link in the Exhibits task pane.



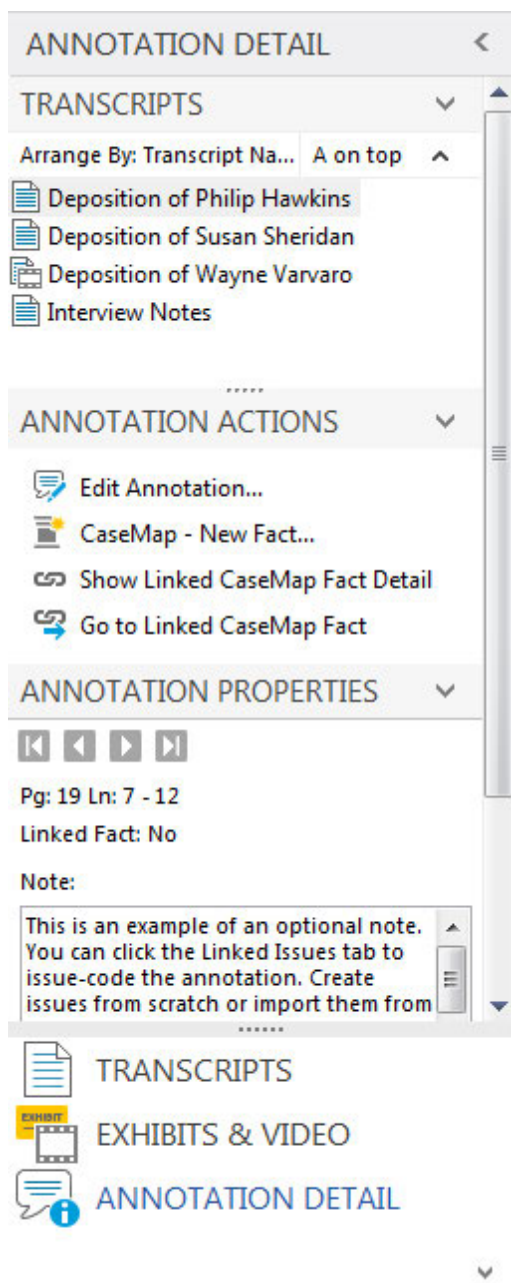
Annotation Detail pane

The Annotation Detail pane has three tasks panes and a toolbar:

- **Transcripts pane** — Allows you to navigate between transcripts or transcript groups within a case.
- **Annotation Actions pane** — Allows you to edit the selected annotation, send a new fact to CaseMap (the fact will be linked to the current annotation), view the linked CaseMap fact details, and view the fact record in CaseMap that corresponds to the selected

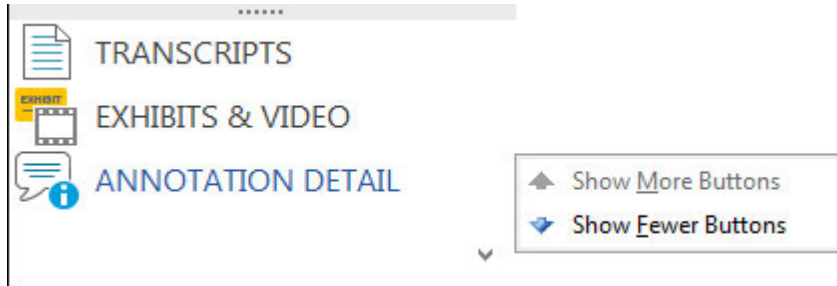
annotation.

- **Annotation Properties pane** — Displays the annotation properties for the annotation currently selected in the Transcript window. The annotation properties include the transcript page and line numbers for the annotation location in the transcript, whether the annotation is linked to a fact record in the corresponding CaseMap case, any annotation notes, and the name of linked case issues and the color associated with each linked case issue.
- **Annotation Detail toolbar** — Allows you to navigate between annotations in the selected transcript.



Arrow button

Below the Annotation Detail button is the Arrow button, which allows you to collapse or expand buttons to maximize the pane view.



Related Topics

[Navigating TextMap](#)

[About the Search pane](#)

[Modifying Navigation pane display](#)

About the Search pane

The Search pane allows you to run basic word and full-text searches on transcripts in the case. The Search pane includes two tabs: Word Search and Full Text Search.

To view the Word Search tab

The Word Search tab allows you to run word searches on all transcripts in the case. Search results display within the Word Search tab. See [About searching](#) and [Running basic word searches](#).

WORD SEARCH | FULL TEXT SEARCH

Enter Search Word

☐ 00

☐ *Deposition of Philip Hawkins*

1:9,18, 30:17,18

☐ 000

☐ 001

☐ 02

☐ 05

☐ 07

☐ 08

☐ 1

☐ 10

☐ 100

☐ 106

☐ 10th

WORD SEARCH | FULL TEXT SEARCH

hawkins

☐ hawkins

☐ *Deposition of Philip Hawkins*

1:6,15, 2:16, 3:4, 4:4,8,15, 26:21, 37:5

38:7, 39:3,18

☐ *Deposition of Susan Sheridan*

1:3, 8:12, 9:20, 11:21, 17:14, 18:16, 19:2

19:13, 21:3, 23:21, 24:6, 25:1, 28:12

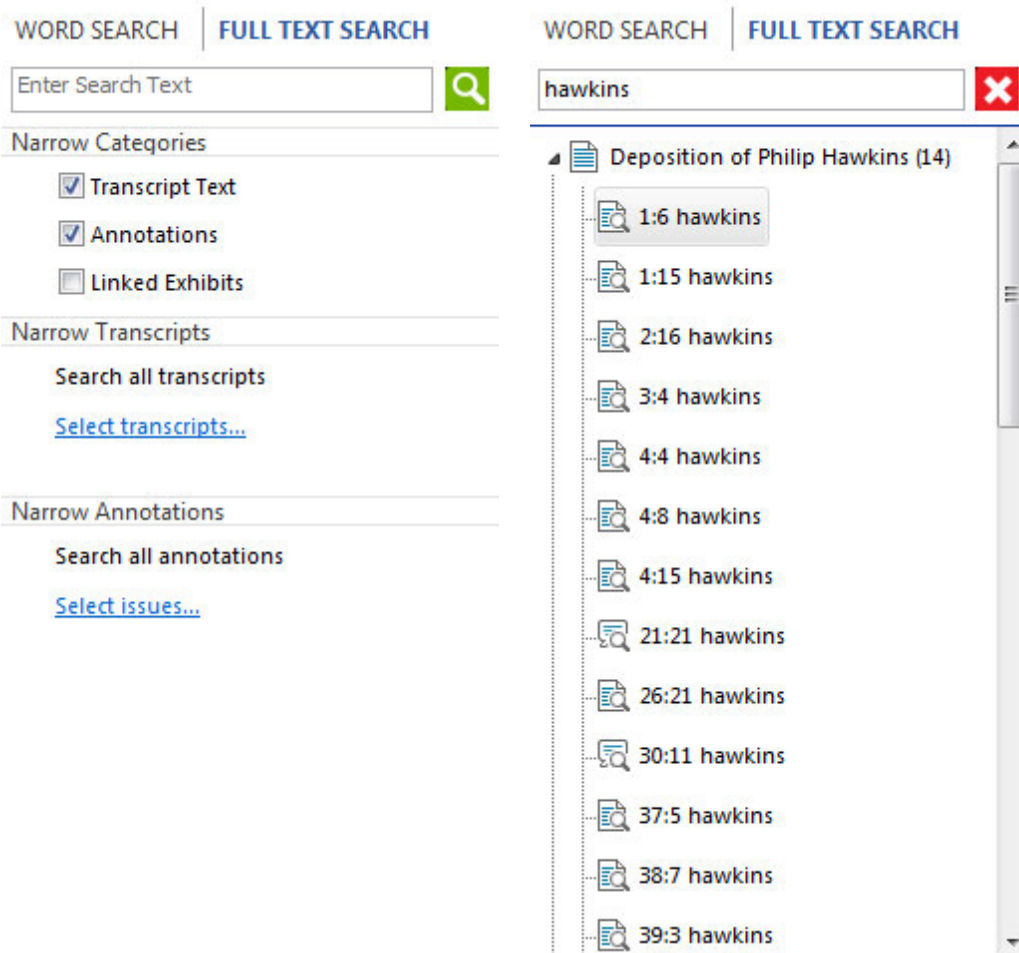
29:18, 35:1, 36:9, 39:10, 41:2, 42:4

☐ *Deposition of Wayne Varvaro*

1:6

To view the Full Text Search tab

The Full Text Search tab allows you to run multiple word searches on transcripts in the case (or from the Full Text Search dialog box). Full-text searches can be run on all or selected transcripts or transcript groups. Full-text search results display within the Full Text Search tab. See [About full-text searching](#) and [Running full-text searches](#).

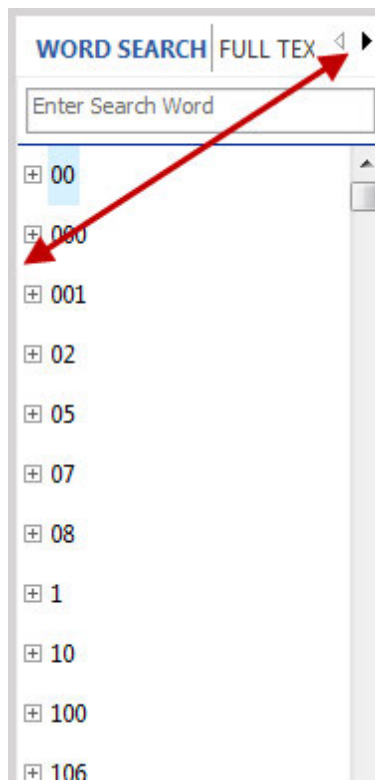


To resize the Search pane to maximize transcript view

The Search pane displays to the right of the Transcript window. To increase your viewing space, you can re-size the Search pane by dragging the split bar to the left or right.

You can change search tabs by clicking the Previous and Next buttons  in the top right of the pane. The Previous and Next buttons display as the Search pane is re-sized closely to the right side of the TextMap window.

You can still run searches in either search tab as long as the search box is visible; however you may not be able to view search results clearly or narrow full-text searches by category as easily.



Related Topics

- [Navigating TextMap](#)
- [About the Navigation pane](#)
- [About searching](#)
- [Running basic keyword searches](#)
- [About full-text searching](#)
- [Running full-text searches](#)

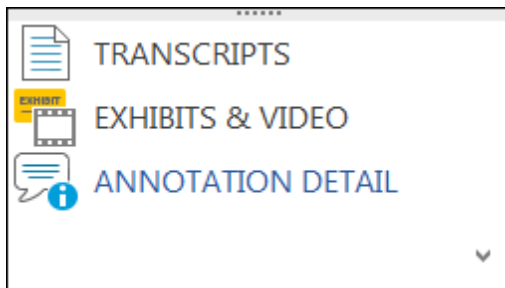
Modifying Navigation pane display

You can modify the display of the Navigation pane to suit your viewing preferences: move the task pane buttons, resize the Navigation pane view, and hide the Navigation pane.

To change the Navigation pane display

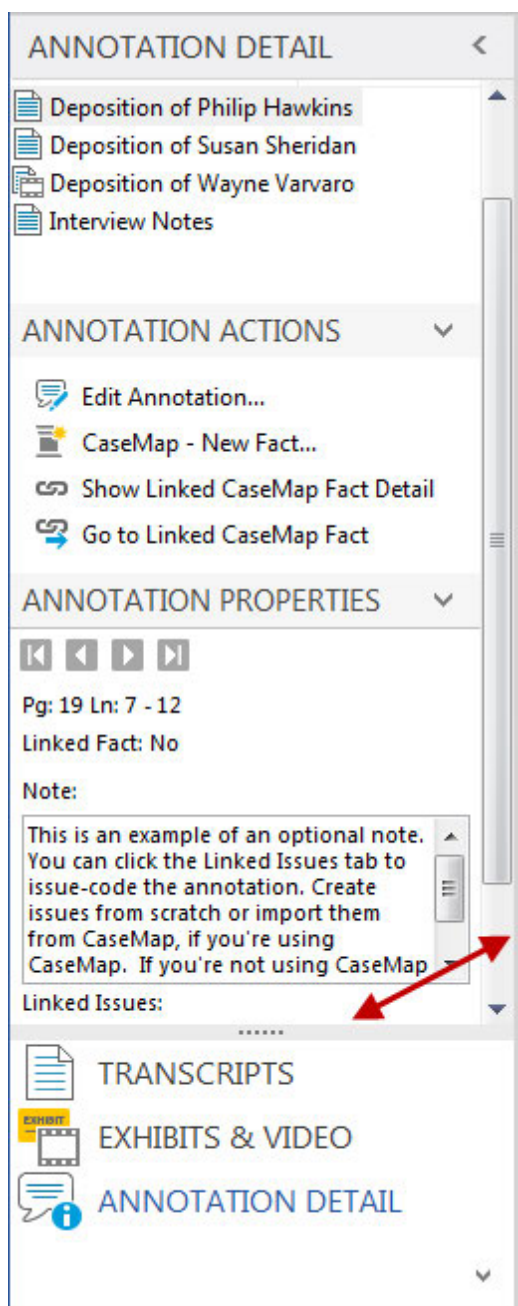
To change the Navigation pane display, click on the respective pane's button. The active

pane is highlighted accordingly.

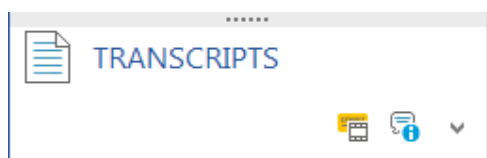


 To maximize a pane for better viewing

To change the height or width of the Navigation pane, drag the split bars to the left or right, or up or down.

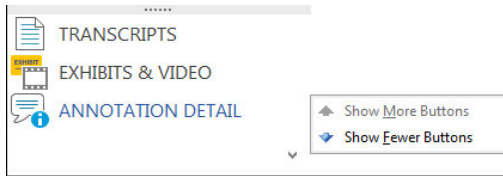


As you pull the bottom split bar down, the Navigation pane buttons change into icons on the lower button.



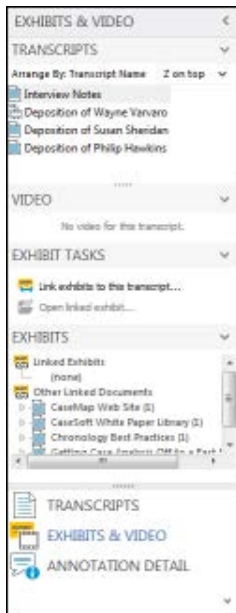
You can also, click the arrow on the lower button and select Show More Buttons or Show

Fewer Buttons to maximize the pane view.



To hide task panes for better viewing

To show/hide task panes on the Navigation pane, click the Expand/Collapse buttons . For example, if you want to expand the display area of the Exhibits task pane in the Exhibits and Video pane, you can hide the Transcripts, Video, and Exhibits Tasks panes.



To hide the Navigation pane to maximize the spreadsheet view

To maximize a transcript's view on-screen, click on the Collapse button to pin the Navigation pane to the left side of TextMap. The Navigation pane can easily be expanded and locked on-screen when you need to use it more frequently.



Related Topics

[Navigating TextMap](#)

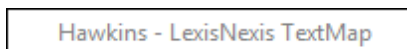
[About the Navigation pane](#)

About the title and status bars

TextMap has two title bars: one for the application and one for the transcript. The status bar is on the bottom of the TextMap window.

Application title bar:

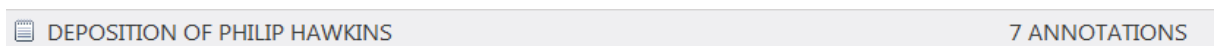
TextMap's title bar displays the name of the case you are currently viewing.



Transcript title bar:

The Transcript title bar displays above the Annotations pane and Transcript window. The left side of the title bar displays the title of the current transcript. The right side of the title bar displays the number of annotations in the current transcript.

If a search is performed, a Search Results bar displays just below the title bar with the search criteria noted. Click the Cancel Search or Save buttons to remove the search or save it for later use.



Status bar:

The status bar at the bottom of the TextMap window displays the current transcript out of the total number of transcripts in the case, the current transcript page out of the total number of transcript pages, the current user name, and the indexing and OCR processing status.

Transcripts: 4 Page 10 of 1 - 40 Line 10 Col 0 User: Chris Attorney  

Related Topics

[Navigating TextMap](#)

About TextMap toolbar buttons

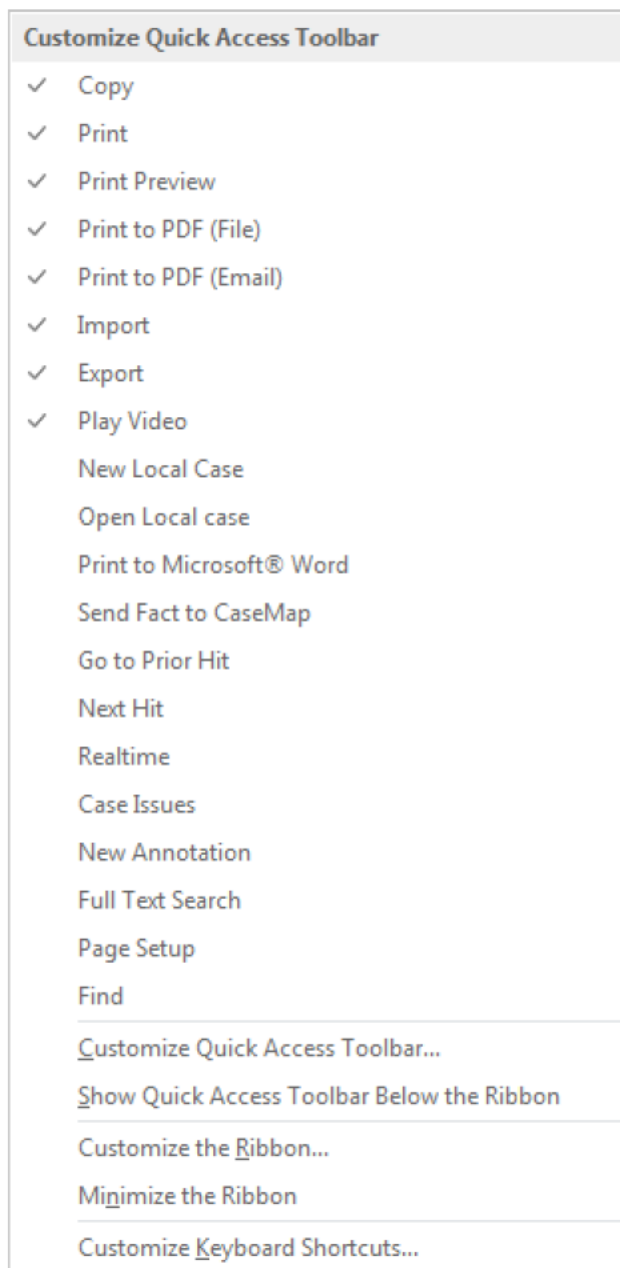
TextMap has a Quick Access toolbar that you can customize to display which buttons you use most frequently. By default, the toolbar displays the most commonly used buttons. Place your mouse pointer over each button to view its name.

Click on the More Buttons  icon at the far right of the toolbar to view a listing of all available buttons. Select a button in the button list to add or remove a button to or from the toolbar. All checked buttons in the list display on the toolbar.



The toolbar submenu allows you to determine which toolbar/ribbons are displayed in TextMap, and customize the Quick Access toolbar, to include customizing ribbons and keyboard shortcuts using the Customize dialog box.

To reset the toolbar to its original default view, click on the More Buttons icon  to view the toolbar menu, and then select Reset at the bottom of the Ribbon Customization dialog box.



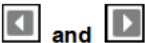
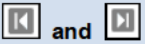
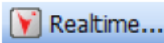
Quick Access toolbar buttons



Reference the following table for a listing of the Quick Access toolbar buttons and descriptions.

-  Placing your pointer over an icon (i.e., Import Transcript) within the application provides a brief description/use of the selected icon.

Quick Access Toolbar Buttons		
Button	Name	Use
	Copy Selection	Use the Copy Selection button to copy text from a transcript to paste into a text file or another application.
	Copy with Page:Line	Use the Copy w/ Page:Line button to copy text or text from a transcript with page/line numbers included.
	Copy Annotations	Use the Copy Annotations button to copy the contents of the selected annotation.
	Print	Use the Print button to print transcripts, annotations, notes, and the case index to the default printer.
	Print Preview	Use the Print Preview button to view the print preview of transcripts, annotations, notes, and the case index.
	Print to PDF (File)	Use the Print to PDF (File) button to print transcripts, annotations, and notes to an Adobe Acrobat PDF file. Opens the Save As PDF dialog box and allows you to save the PDF file to a local or network directory.
	Print to PDF (Email)	Use the Print to PDF (Email) button to compile a PDF and then opens the default email application so you can save the PDF file as an e-mail attachment.
	Import Transcript	Use the Import Transcript button to select one or more transcripts to be imported in to the case.
	Export Transcript	Use the Export Transcript button to select one or more transcripts, along with annotations and linked exhibits to be exported.
	Play Video	Use the Play Video button to play the video associated with the selected transcript. Clicking the Play Video button opens the Exhibits and Video pane in the Navigation pane, and the video is displayed in the Video pane. The Play Video button is only active when the selected transcript contains a video file.
	New Local Case	Use the New Case button to open the New Case Wizard for adding a new local TextMap case.
	Open Local Case	Use the Open Local Case button to open a dialog box for selecting and opening a local case in TextMap.
	Print to Microsoft Word	Use the Print to Microsoft Word button to print transcript annotations and notes to a Microsoft Word file.

Quick Access Toolbar Buttons		
Button	Name	Use
	Send Fact to CaseMap	Use the Send Fact to CaseMap button to send the selected text in a transcript to CaseMap. Before you can send a fact to CaseMap, the case must be opened in CaseMap.
	Go to Prior Hit and Next Hit	Use the Go to Prior Hit and Next Hit buttons to navigate search hits in your transcript.
	Go to First Hit and Go to Last	Use the Go to First Hit and Go to Last Hit buttons to navigate search hits in your transcript.
	Realtime	Use the Realtime button to open CaseViewNet. CaseViewNet is a free transcript viewer made by Stenograph, LLC.
	Case Issues	Use the Case Issues button to create, delete, and/or import issues associated with the case.
	New Annotation	Use the Export to iPad button to export case issues, transcripts, annotations, and linked exhibits to an Apple iPad.
	Edit Annotation	Use the Edit Annotation button to edit the selected annotation.
	Move Annotation	Use the Move Annotation button to move the selected annotation to a new location within the transcript.
	Delete Annotation	Use the Delete Annotation button to select an option to delete a single or all annotations from the transcript.
	New Fact	Use the New Fact button to create a new fact record in CaseMap.
	Full Text Search	Use the Send Fact to CaseMap button to send the selected text in a transcript to CaseMap. Before you can send a fact to CaseMap, the case must be opened in CaseMap
	Page Setup	Use the Page Setup button to adjust paper size, orientation, printer source, and report scaling options before printing reports and other materials.
	Find	Use the Find feature to search case content. You can also replace text if you need to change the spelling of a word in your case.

Quick Access Toolbar Buttons		
Button	Name	Use
	Close	Use the Close button to close and exit the current transcript.

Related Topics

[Navigating TextMap](#)

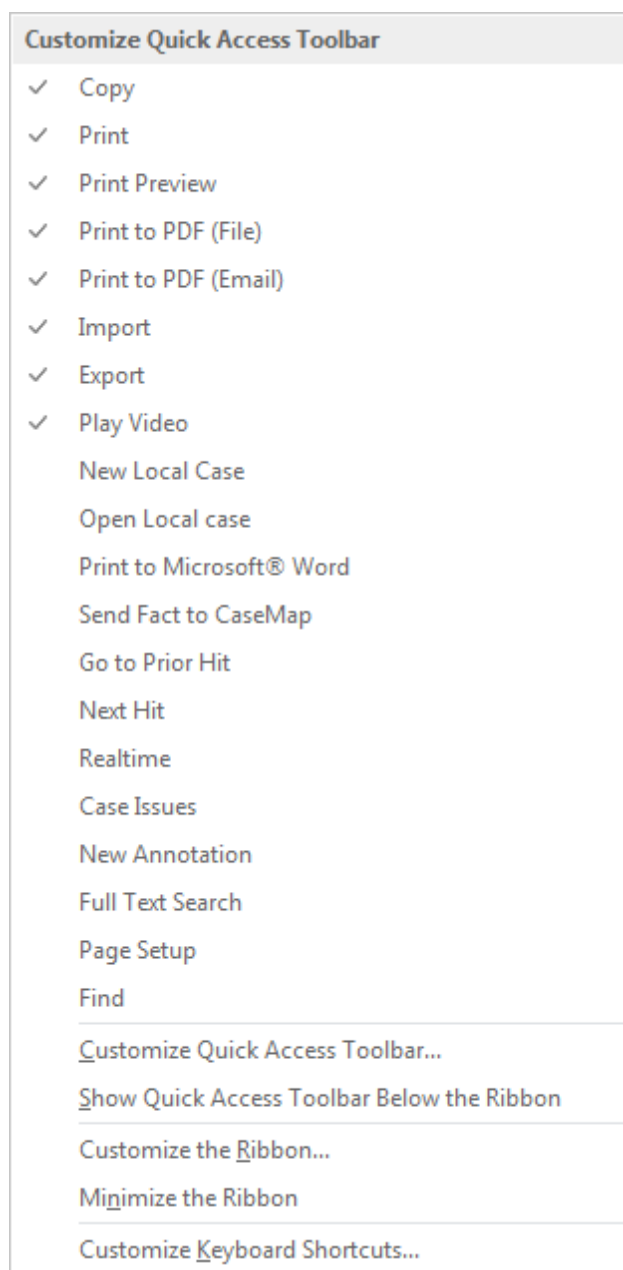
[Changing toolbar buttons and settings](#)

Changing toolbar buttons and settings

TextMap allows you to add and remove toolbar buttons and settings for your personal view.

To add/remove toolbar buttons

1. On the **Quick Access** toolbar, click the **More Buttons**  icon in the upper left corner.
You can also right-click on the Quick Access toolbar.
2. From the **Quick Access Toolbar** list, select or deselect the buttons you want to display.
Menu items with a check mark display on the toolbar. The toolbar display is updated.



To add menu commands to the toolbar

1. On the **Quick Access** toolbar, click the **More Buttons**  icon in the upper left corner.
You can also right-click on the Quick Access toolbar.
2. From the menu list, select one of the following:

Customize the ribbon

- a. Click **Customize the Ribbon**.

- b. In the **Choose commands from** area of the **Ribbon Customization** dialog box, select the desired command/tab.

The Command display is updated based on the command type selected in the previous step.

- c. Under the **Customize the Ribbon** heading, place a check mark next to the tab(s) to be displayed.

- d. Use the applicable up  or down  arrow to place appropriately.

- e. **Optional: To add a new tab**

1. Under the **Customize the Ribbon** heading, select the tab/area where the new tab is to be added.

2. Click the **Add** button, and then click **Add New Tab**.

A new tab is added.

3. Click the **Rename** button.

4. In the **Display name** box, enter a new name for the tab.

5. Click **OK**.

The new name is displayed.

6. Click **OK** to close the **Ribbon Customization** dialog box.

- f. **Optional: To reset customized ribbon settings**

1. Click the **Reset** button and select:

Reset only selected tab to reset only settings for the selected tab.

Reset all customizations to reset all customized settings back to the default system settings.

2. Click **OK**.

To customize toolbar

1. Right-click on the **Quick Access** toolbar, and click **Customize Quick Access Toolbar**.
2. In the **Quick Access Toolbar Customization** dialog box, in the **Choose commands from** area, select a command in the list.
3. Select applicable tabs, submenus, etc. and click the right arrow .
4. In the **Customize Quick Access Toolbar** area, use the Up arrow  to adjust the placement.

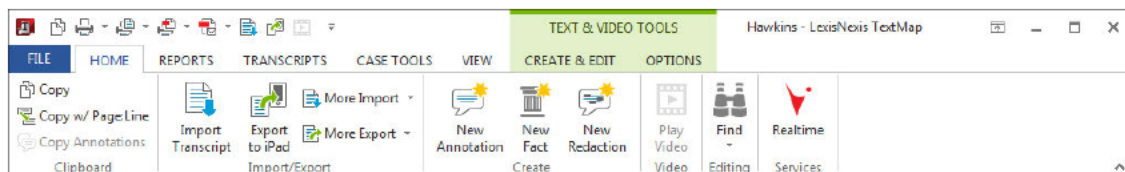
5. Repeat Steps 2 - Steps 4 as applicable.
6. Click **OK** to save setting changes.

Related Topics

[Navigating TextMap](#)
[About TextMap toolbar buttons](#)

About TextMap menus

TextMap's Menu bar (now referred to as the Main Ribbon) is located at the top left of the TextMap screen. Click on each ribbon (e.g., Home) to access the menus/commands, each providing additional functionality in TextMap.

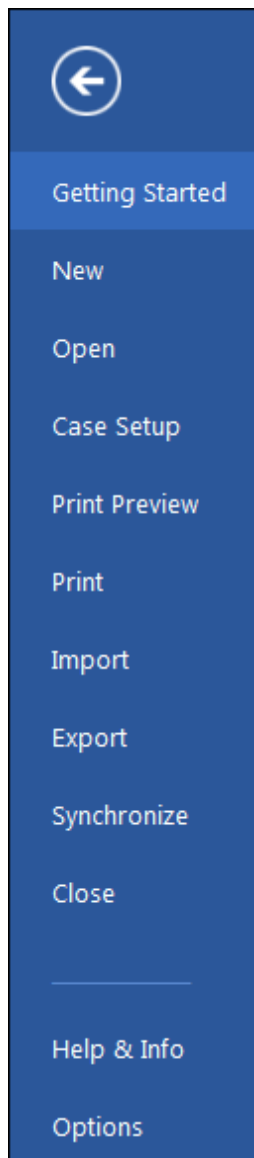


The commands on each menu affect the transcript currently in view. Some options will give you an arrow that opens a submenu of additional tools. Most of the commands also have corresponding keyboard shortcuts. See [Using keyboard shortcuts](#).

File menu

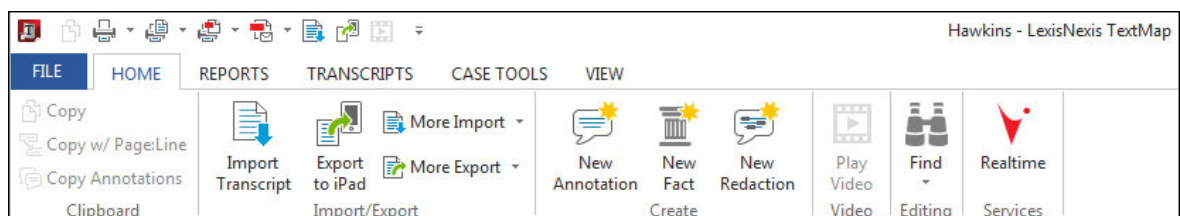
The File menu contains menu items useful in getting started and accessing your case, such as New Case, Open Case, Open SQL Case, Close Case, and Exit. The File menu also has options for importing data from other applications, exporting case issues, transcripts, annotations, and linked exhibits, changing report options in the Page Setup dialog box, creating a replica and synchronizing data from a replica case with the master file. Print and Print Preview options are also listed on this menu. And you can view case properties too.

-  If you are using CaseMap Server, the File menu has two options for opening a case: Open Local Case and Open SQL Case. The menu also has an option: New Local Case.



Home ribbon

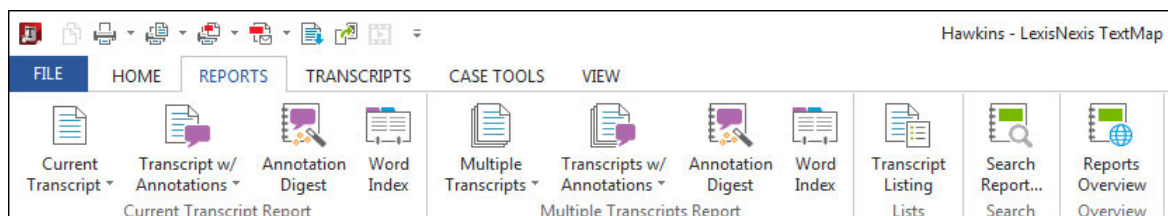
The Home ribbon contains menu items for copying transcript text in the Transcript window, finding text in the current transcript using the Find dialog box, and navigating directly to a page and/or line within the selected transcript using the Go To dialog box. The Home ribbon provides you with import and export capabilities, to include the ability to add new annotations, facts and redactions with access to CaseViewNet®.



Reports ribbon

The Reports ribbon contains menu items for printing transcripts using the Transcript Listing tab. There is also a command for printing the TextMap Transcript Listing report, which displays the list of transcripts in each case.

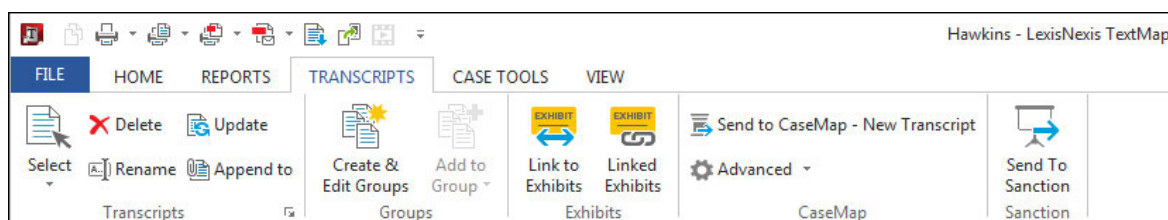
The Search Reports submenu contains menu items for generating and printing a Search Report for the current search results or creating a new search and printing the search results for the new search.



Transcripts ribbon

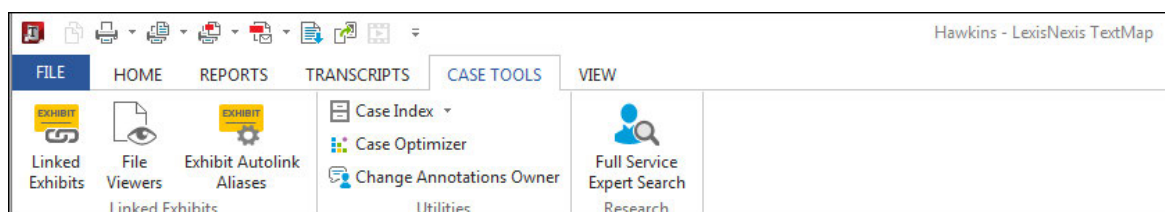
The Transcripts ribbon contains menu items for selecting the transcript to display, creating and maintaining transcript groups, linking exhibits to transcripts, renaming, deleting, updating, and appending transcripts, adding transcripts to a transcript group, as well as sending transcripts to CaseMap and/or Sanction.

The Send To CaseMap option allows you to send transcripts to CaseMap, whereas the Advanced CaseMap submenu allows you to update the transcript in CaseMap, show the linked CaseMap record detail, navigate to the linked CaseMap record in CaseMap. The Transcripts ribbon also provides you with the ability to send transcripts to include Media clips directly to Sanction.



Case Tools ribbon

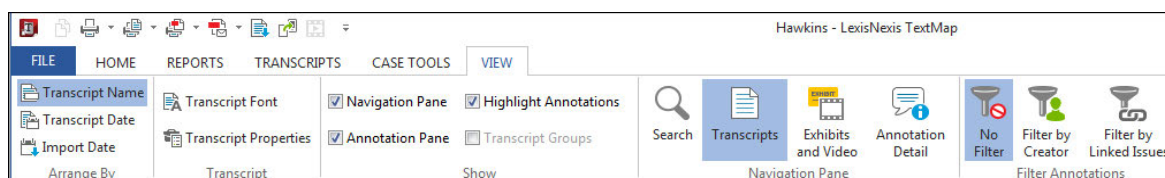
The Case Tools ribbon contains menu items for managing linked exhibits, exhibit autolink aliases, and TextMap utilities. Per one of the utilities, the Case Index submenu, you are allowed to rebuild the case index, view linked exhibit index and OCR status, disable/enable OCR processing, and manage the Case Ignore Words list. Other utilities allow you to optimize the case, change annotation owners, and also provides access the LexisNexis Expert Research On-Demand web site.



View ribbon

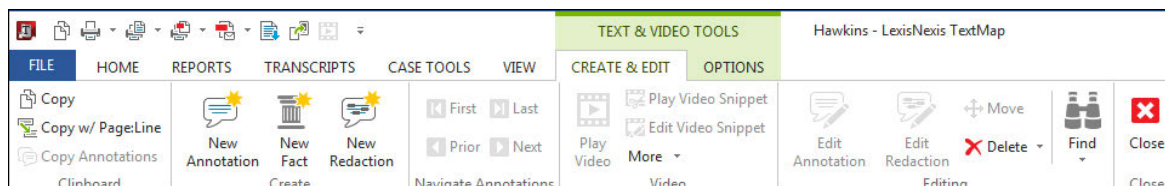
The View ribbon contains menu items for modifying the TextMap user interface based on your viewing preference. From the View ribbon, you can change the arrangement/sort order of transcripts, choose whether to display all transcripts (i.e., groups), manage transcript font size and transcript properties, show/hide the Navigation, Annotation, and annotation highlights in the Transcript window, and determine which pane (e.g., Transcripts) is currently displayed in the Navigation pane.

With the Filter Annotations tab, you can filter annotations by creator or linked issues.



Text & Video Tools Create & Edit ribbon

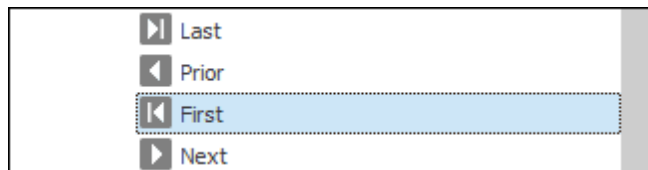
The Create & Edit ribbon appears when there is transcript text focus, or when an annotation or transcript text has been selected. It is accessed from the Text & Video Tools ribbon and contains menu items for copying transcript text in the Transcript window, finding text in the current transcript using the Find dialog box, and navigating directly to a page and/or line within the selected transcript using the Go To dialog box. From the Create & Edit tab, you can also manage videos, navigate, create and edit annotations.



Adjust navigate annotation ribbon button layout

1. Open a case in TextMap.
2. Click on any transcript text to display the Create & Edit ribbon.
3. Right-click on the **Text & Video Tool Create & Edit** ribbon, and on the sub-menu, click **Customize the Ribbon**.
4. In the **Ribbon Customization** dialog box, select the **Navigate Annotations** option to be

moved, and then using the **Up**  or **Down**  arrow, change the order to any order necessary to meet your needs.



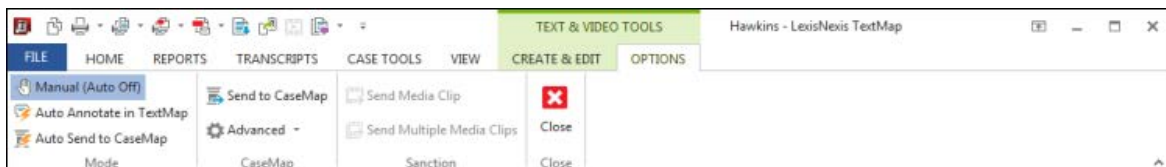
5. Click **OK** to implement the change.

The changed order is displayed on the refreshed Text & Video Tools Create & Edit ribbon.

Text & Video Tools Options ribbon

The Options ribbon appears when there is transcript text focus, or when an annotation or transcript text has been selected. It is accessed from the Text & Video Tools ribbon and contains menu items for:

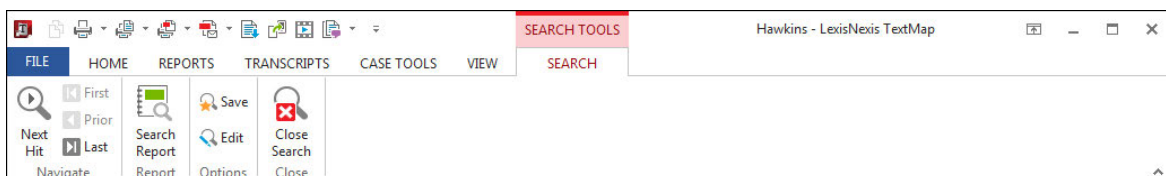
- selecting the annotation mode
- sending annotations to CaseMap
- sending annotations to Sanction as media clips when the transcript has synchronized video
- updating facts associated with an annotation in CaseMap
- showing the linked CaseMap fact detail
- navigating to the linked CaseMap fact in CaseMap.



Search Tools Search ribbon

The Search ribbon appears when there is an active search and contains menu items for navigating between search hits in the selected transcript, creating reports, saving, editing, and canceling the current search.

The Search Reports ribbon's Search Report menu item launches the Search Report Wizard to generate and print a Search Report.



Help & Info menu

The Help menu which is accessed from the File menu provides access to the TextMap Answer Center as well as a variety of other reference materials. From this menu, you can also reference your TextMap license and registration information, activate the software, and check for Web updates of the software, to include access to TextMap Training and Support information.

Hawkins - LexisNexis TextMap



Getting Started

New

Open

Case Setup

Print Preview

Print

Import

Export

Synchronize

Close

Help & Info

Options

Help & Info

Contents

 **Contents**
View the online help content available on the TextMap Answer Center.

Training & Support

 **TextMap Quick Start Tutorial**
Walk through a brief online tutorial.

 **What's New in TextMap**
Visit the online TextMap Answer Center to find out what's new.

 **'How To' Video Library**
Visit the 'How To' video library to view short videos on performing various tasks.

 **Training Options**
Learn about the available TextMap training options.

 **TextMap Webinar Center**
Visit the online TextMap Webinar Center for helpful video tutorials.

 **Contact Us**
Visit the online TextMap Answer Center to get contact information.

Product Information

LexisNexis TextMap
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Activate TextMap


About
TextMap

About TextMap
Learn more about TextMap, Support, Registration Information, Product ID and Copyright information.


Update
TextMap

Update TextMap
Check for and download updates to this version.

 If you are using CaseMap Server and have a SQL case open, click About LexisNexis TextMap and then click the Disabled Features button to verify if any permissions are disabled for your user account. If no permissions are disabled, a message displays to indicate that.

Related Topics

[Navigating TextMap](#)

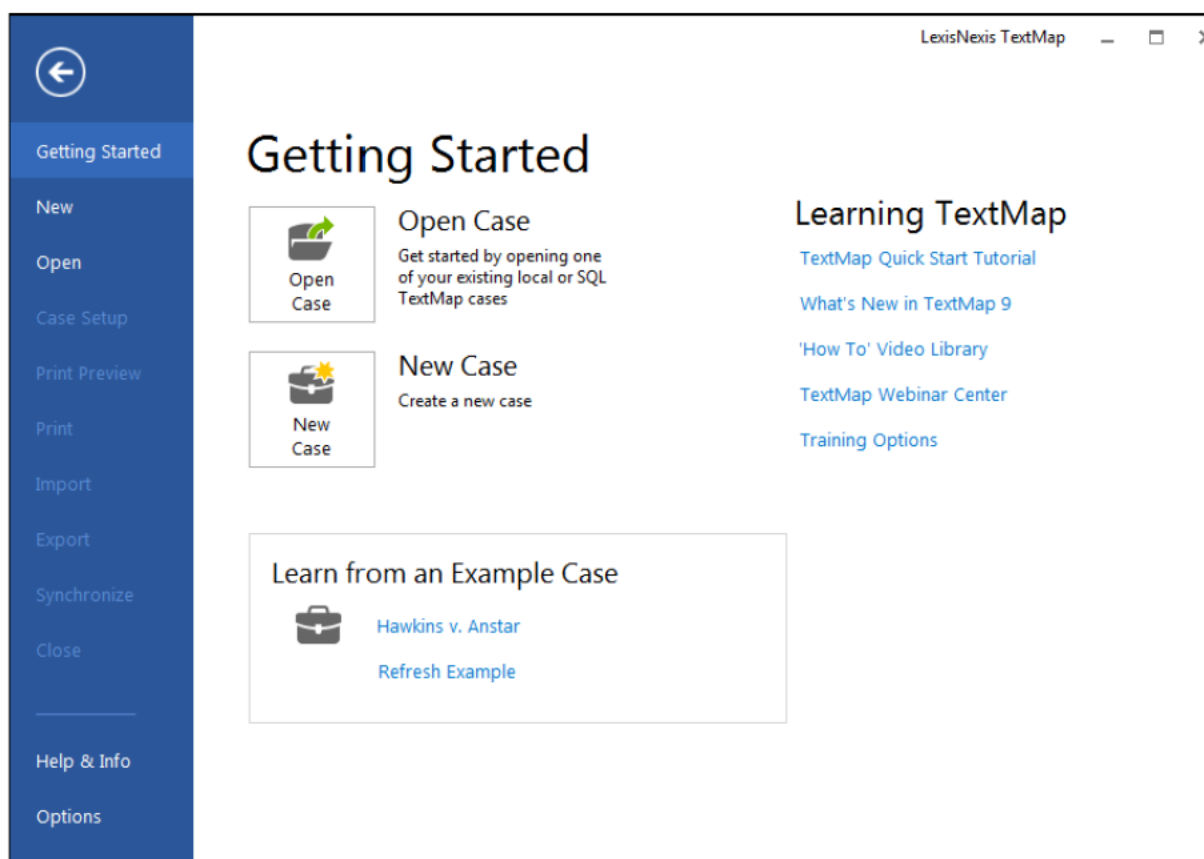
[Changing toolbar settings and buttons](#)

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Getting Started

About the Getting Started pane

The Getting Started pane displays when you open TextMap or close a case. From this pane you can access recently-opened cases, older cases, create a new case, or refresh and open the Hawkins example case. You can access a variety of learning resources from here too. If you already have a case open and want to open the Getting Started pane, you can still access this pane from the File menu.



💡 You can clear the recent case list from the Help menu, by clicking on Options and then clicking General. On the General tab, click the Clear Recent File List button. Click OK when you are finished.

To open/close the Getting Started pane when a case is open

1. Click the **File** menu.

The Getting Started page displays.

You can also click the Getting Started tab from another tab (e.g., Case Setup) to open it.

2. On the **Getting Started** pane, click the **X** in the upper right corner to close it.

You can also click on another tab (e.g., Case Setup) to close the Getting Started page.

Related Topics

[Practicing with sample data](#)

[Quick Start Tutorial](#)

[Opening cases](#)

Practicing with sample data

TextMap provides you with a sample case, Hawkins v. Anstar, so you can practice using the application without using your own data. Hawkins v. Anstar is a fictitious case. When experimenting with the case, you can feel confident about clicking, adding, updating, and deleting data without ruining it. Any changes you make to the example case are automatically saved so you can see how the software displays and updates data.

You can always practice a feature more than once by refreshing the sample data to its original state and starting again.

To open the example case

On the **Getting Started** pane, under **Learn from an Example Case**, click **Hawkins v. Anstar**.

If you cannot find the Getting Started pane, click the File menu and then click Getting Started.

To refresh the example case

1. On the **File** menu, click **Getting Started**.
2. On the **Getting Started** page, under **Learn from an Example Case**, click **Refresh Example**.
3. Click on **Hawkins v. Anstar** to re-open the refreshed case.

Related Topics

[About the Getting Started pane](#)

[Quick Start Tutorial](#)
[Opening cases](#)

Using the Quick Start Tutorial

If you have not yet signed up for TextMap training, the TextMap Quick Start tutorial will help get you grounded in using the software and working in a case.

The TextMap Quick Start tutorial is designed to help you:

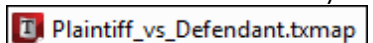
- Learn about TextMap's primary features.
- Gain an introduction to the tools and features you need to use to create a case and start working in it.
- Practice using some of the features using the Hawkins v. Anstar example case provided in TextMap.
- Direct you to the help topics and procedures you need to accomplish initial tasks and learn more about TextMap.

Creating new cases

TextMap cases are created using the New Case Wizard, which guides you through answering all the questions needed to create the file. The New Case Wizard provides you with a default new case template that accommodates most of your data entry needs. The example case, Hawkins v. Anstar, uses a new case template. See [Practicing with sample data](#).

TextMap cases are used by multiple staff. Store the case in a shared location on a network drive so more than one staff member can work on annotating and summarizing depositions and transcripts in the case file at the same time. You can add case staff as users in the New Case Wizard or add them later in the Case Staff dialog box by clicking File > Case Setup > Edit Staff.

Case files are identified by the column icon and have a file extension of .txmap



See [About cases](#), [Creating cases](#), and [Adding users to cases](#).

Importing transcripts

You must import transcripts into your new case before you can search and annotate them or cull out facts to send to CaseMap. Import transcript files into TextMap by clicking the Import File(s) option on the File or Transcript menus. Transcripts display in the main Transcript window with page and line numbers displaying in the left margin.

The most common way to import information into TextMap is by importing a file in an ASCII text file. This allows the line numbering and page numbering of the original transcript to be the same as the transcript inside TextMap. See [About importing data](#) for a complete listing of

files types you can import. See [Importing transcripts](#) for more information about the import process.

TextMap Exhibit Packages (created by TextMap® Exhibit Linker) include a transcript, hyperlinks to exhibits mentioned throughout the text, and the linked exhibit documents. You import an Exhibit Package file (*.xmef) just like any other transcript. All the exhibits and exhibit hyperlinks in the transcript are available instantly. See [Importing exhibit packages](#).

You can also import video files like any other transcript in TextMap. When the import is complete the transcript displays in the Transcript List with a video icon that is different than the icon for text-only transcripts. You can search and annotate video transcripts just as you would with other transcripts in the case. See [About videos](#) and [Importing video files](#).

[Creating case issues](#)

If you are using TextMap and CaseMap together you can import your issue outline from a corresponding CaseMap case and then create categorizing issues, like Background, that are only used in the corresponding TextMap case. If you are using TextMap as a stand-alone transcript summary tool, you can quickly create an issue outline from scratch. See [About case issues](#) and [Importing case issues](#).

In TextMap, all issues are initially set to the default color yellow. You can assign each issue a color so that it can be easily identified when scrolling through the transcript. For instance, you could color code all research items red to be easily recognizable. You can also move topics around in an issues list, arranging issues in a different order. And you can create sub-issues or child issues of the parent issue. See [Creating case issues](#).

Once issues are created and coded by color, you can issue-code annotations. Annotations can be linked to one or more case issues. See [About annotations](#) and [Creating annotations](#).

[Searching transcripts, annotations, and linked exhibits](#)

TextMap allows you to quickly search all transcripts, exhibits, documents, annotations, and notes in your case because it automatically creates a case index during the import process.

Searching is performed in the Search pane that displays at the bottom right of TextMap. The Search pane contains two tabs: Word Search and Full Text Search. Search results display within their respective tabs. See [About the Search pane](#).

There are two methods of searching in TextMap:

- **Basic Word Searches** — performing single word searches to locate all instances of the word in transcript text. See [Running basic word searches](#).
- **Full-Text Searching** — performing full-text searches against transcript text, annotations, and exhibits. See [About full-text searching](#) and [Running full-text searches](#).

To learn more about searching, see also [About searching](#) and [Viewing/navigating search results](#).

[Choosing an annotation mode](#)

TextMap offers three annotation modes to help you simplify the annotation process, depending on how you want to work. Each time you open a case in TextMap, the TextMap Default Annotation Mode dialog box displays, unless you select the Don't show again check box. You can change annotation modes at any time by clicking the Annotation menu and then clicking the desired mode. You can also click on the Annotations button on the toolbar or use the right-click menu. Manual Mode is the default annotation mode.

- If you choose **Manual Mode** (default), each time you annotate text you will have the option to choose which mode you want to use: Annotate in TextMap or Send to CaseMap.
- If you choose **Auto Annotate in TextMap**, the New Annotation dialog box automatically displays each time you highlight transcript text. You can quickly type in notes or link issues and exhibits before you send the passage to CaseMap. See [Creating annotations](#).
- If you choose **Auto Send to CaseMap** mode, the annotated passage will be sent as a new fact to CaseMap and the Send to CaseMap dialog box displays. See [Sending facts to CaseMap](#).

To learn more about switching annotation modes, see [About annotations](#).

Annotating transcripts

After transcripts have been imported into TextMap, they are ready to be analyzed and annotated. During this process, you will select phrases, sentences and paragraphs, and comment on them. Annotations can be part of a deposition summary report, or passage you want to use as the basis for a fact in CaseMap. You can categorize annotations by case issue and link exhibits to the annotated text. Annotations display in the transcript as yellow (by default). Annotations linked to issues display the color of that issue code. Annotations can be linked to one or more issues. See [About annotations](#) and [About case issues](#).

To annotate a transcript, use your mouse to highlight a passage of transcript text, then right-click to select the annotation mode you want to use: Annotate in TextMap or Send Fact to CaseMap. See [Creating annotations](#).

Annotated text displays highlighted in the Transcripts window (center pane) with a sticky note icon in the left margin. The annotation displays as yellow by default or in the color of the linked issue.

Annotations also display in the Annotations pane where they can be sorted and filtered. You can also view annotations in the Annotation Detail pane. See [Viewing annotations](#), [Sorting annotations](#), and [Filtering annotations](#).

Color-coded annotations display in reports in color. Reports can be filtered so only annotations associated with specific issues are included. See [Printing annotation reports](#).

Reviewing and annotating using the TextMap App for iPad

With TextMap, you can easily review and annotate transcripts on your Apple® iPad®. Download the free TextMap app for iPad from the Apple Store and then email the transcripts you want to review. Simply open the email attachment on your iPad to import the case.

When you are ready to update the master case with your new or edited annotations, simply email them from the iPad. Opening the email attachment will start the import process and prompt you to apply your updates to the master case. TextMap has no limit to the number of case users that can send annotations from their iPads.

Anytime you need the most recent changes to the master case, export the changes and merge them with the changes already on the iPad.

For more information, see About the TextMap app for iPad, [Exporting data to an iPad](#), and [Importing data from an iPad](#).

Sending facts to CaseMap

We encourage you to use CaseMap from the first day you begin working on a new matter.

When you use CaseMap in conjunction with TextMap, you can enter new facts well in advance of having court-appropriate sources for these fact records. And you can always update the existing fact records while working in TextMap. Later, when you find a source for a given fact as you review a transcript, you can update the pre-existing fact.

TextMap is designed so you can optionally perform all basic data entry about a fact in the midst of sending a transcript passage to CaseMap. These options are available in the dialog boxes that display when you send a new fact to CaseMap or update an existing one. For each transcript passage sent to CaseMap, TextMap automatically creates a source that references the transcript and the page and line numbers of the selection. You must have the related CaseMap case already open in order to send transcript annotations from TextMap to CaseMap.

You can tell which annotations have already been sent to CaseMap by checking the Annotations pane at the top of the page. The Linked Fact column has a Yes/No status indicator for each annotation. Annotations with a Yes have been sent to CaseMap. The CaseMap fact automatically links back to the selected passage in the transcript. If the fact has already been sent, a message displays asking if you want to re-send the annotation (it replaces the link to the existing fact).

If you intend to send multiple annotations to CaseMap, consider switching to the Auto Send to CaseMap annotation mode. Click the arrow next to the Annotate in TextMap button or click the Annotations menu, and then click Auto Send to CaseMap. Each time you annotate transcript text the Send to CaseMap dialog box automatically launches, skipping the New Annotation dialog box

See [Sending facts to CaseMap](#) and [Updating existing facts in CaseMap](#).

[Linking exhibits to transcripts](#)

Exhibits can be files on your computer, web addresses, and custom links to other document management programs. When you have a file that has been referred to as an exhibit during a transcript, you want that file to be linked wherever that exhibit is referred to in the transcript. You can link to exhibits using either the TextMap Exhibit Linker or the Auto Link Exhibit Wizard. See [About exhibits](#).

Link Exhibit Wizards include:

- **TextMap Exhibit Linker** is used before you import transcripts into a TextMap case. This software is provided to court reporters, vendors, and law firm staff so that they can create TextMap Exhibit Packages (.xmef) which can then be imported into TextMap. These files already have the exhibit links embedded in the transcripts. TextMap also imports the linked exhibit PDFs during the import process. See [Using TextMap Exhibit Linker](#).
- The **Auto Link Exhibit Wizard** is used once you have already imported a transcript into TextMap. With this wizard, you can create a hyperlink to a file on your computer, a web address, or a link to another document management system in all places in the transcript where the exhibit is mentioned. See [Linking exhibits to transcripts](#).

Hyperlinks for exhibit files display in the Exhibits and Video pane in the Exhibits pane for the selected transcript. When you click a page and line reference, TextMap displays that point in the transcript. You can view the exhibit by clicking the hyperlink in the transcript or by right-clicking on the exhibit link in the Exhibits pane and clicking Open. You must have the native application installed on your computer in order to view the file. See [Viewing exhibits](#).

To link exhibits or any other files to a single passage in the transcript, use the New Hyperlink Wizard. See [Creating single hyperlinks in transcripts](#).

[Working with video](#)

You can import video files like any other transcript in TextMap. When the import is complete the transcript displays in the Transcript List with a video icon that is different than the icon for text-only transcripts. For a list of video files you can import, see [About videos](#) and [Importing video files](#).

Videos play in TextMap with a cursor scrolling through the text in synch with the video because there are three components working at the same time: a video file (an .mpeg or .wmv), a text file, and a file with synchronization information.

You can search and annotate video transcripts just as you have done with other transcripts in the case. See [Annotating videos](#). In addition, you can use the Edit Video dialog box to make a snippet associated with an annotation a little shorter or longer. See [Editing videos](#).

Before you can play back transcript video in TextMap, you must first have the transcript synchronized with the video. TextMap does not synchronize the video and the transcript for you. Usually your court reporter or videographer can perform the video synchronization service for you. When you schedule a video deposition with court reporters, make sure to ask if they can perform the video synchronization service and provide the synchronized transcript in a format that TextMap can import.

Creating and printing reports

A report is a way to retrieve information that you imported or entered in your case. TextMap offers many useful reporting options, accessible on the Reports ribbon with single and multiple transcript sub-menus. Many of the reports have wizards to make creating useful work product quick and easy. Transcripts with annotations and linked issues have options for including the selected passages and filtering highlighted passages for desired issues. TextMap automatically creates a word index for all transcripts; you can include it with transcript reports or not.

You can print reports to PDF file or print directly onto paper. You can run reports of only the transcripts, just the annotations, or of both the transcripts and the annotations.

The date and time appears in brackets [] in front of the transcript name, and is included in all transcript reports (i.e., Multiple Transcript Report, Annotations Digest Report, etc.).

TextMap includes the following reports:

- **Single Transcript Report** — A simple report made from just one transcript. These reports provide you with the contents of the transcript arranged the way you specify, with the opportunity to select all annotations or annotations related to a specific issue. You can print the contents with or without annotations. You also have the option of printing the word index for that transcript as part of your report. See [Printing single transcripts](#).
- **Multiple Transcript Report (a.k.a ReportBooks)** — A report containing information from more than one transcript is also called a ReportBook. You have the opportunity to choose what transcripts to include in the ReportBook, as well as the option of including a Title Page, Table of Contents, and Introduction. You will have the option to organize transcripts in the order you want them. You also have the same options that you do with a single transcript report. See [Printing multiple transcripts](#).

Annotation Digests are also ReportBooks that can be printed to Microsoft Word. Annotation Digests include the annotations and notes from a set of ReportBooks and can be filtered by issue. See [Printing Annotation Digests](#).

- **Search Report** — The Search Reports is based upon terms you type into the Full Text Search box. The report shows by transcript all locations that contain the search criteria. See [Printing a Search report](#).
- **Transcripts Listing** — A Transcripts Listing provides a list of the transcripts in the case. See [Printing the Transcript Listing](#).

Single and multiple transcript reports can be printed as full-sized, condensed or note-taking versions. Transcripts with Annotations reports allow you to print with Footnotes or Endnotes (full-size or condensed). See [Understanding layout options](#).

The Transcripts with Annotations report, Transcripts with Linked Exhibits report (and no annotations), and Annotation Digest reports allow you to print to a PDF format that includes linked exhibits embedded in the transcript. See [Selecting print output options](#).

For more information, see [About reports](#).

Taking TextMap on the road

Create replica cases for staff who need to work from home or access a case during court or offsite depositions. Replica cases include access to linked files and exhibits, with the exception of Web sites and links to files in a document management systems.

When case users go on the road, they can take a replica along and make additions and updates to case records. While these individuals work in replicas, case staff back in the office can still make changes to the master case. When the replica is returned or emailed to the office, the latest content can be synchronized into the master case.

With TextMap, a replica can be synchronized repeatedly with the master case — without creating duplicate transcripts and annotations. This allows users on the road to email replicas back to the main office for synchronization each time significant updates are made, while continuing to work in the replica.

All replica names (local and SQL versions) must be unique. Creating a replica of a TextMap case is an exclusive process. Case staff cannot access the master case during this process.

For more information, see [About replicating/synchronizing cases](#) and [Creating replica cases](#).

Related Topics

[Practicing with sample data](#)

[Opening cases](#)

Opening cases

Case files are databases created to store all the data related the case. Some case files are created and saved locally on your organization's network. Other case files are created and stored for remote user access across your organization's Wide Area Network (WAN). For example, case files stored on a WAN can be accessed by TextMap users across the nation or even in another country. Depending on how the case file is created and where it is saved determines how you will open the case in TextMap. Case files that are located on the WAN may take longer to open than those saved locally.

Three methods of opening a case:

- File > Open > Recent Cases — Launches a list of cases you frequently use.

- **File > Open > Computer** — Launches cases saved locally on the network and written to a Microsoft® Access database. These case files are saved in network folders where other case file data is stored and organized.
- **File > Open > SQL Case** — Launches SQL cases stored on the Wide Area Network (WAN) and written to a SQL database. These cases are saved in CaseMap Server, which is a dedicated database server designed to store TextMap cases.

If you do not have CaseMap Server, you will not see this option on the File menu.

If you are working in multiple cases, you will need to know which option to use for each case file you want to open. If you are opening SQL cases, your system or database administrator will need to provide you with the network server name and which authentication option to use when opening the case.

TextMap allows you to open one case at a time within an active application window. If you want to work in other cases simultaneously, you'll need to launch additional TextMap windows to access them. Case names display in your Windows title and status bars so you can differentiate them while working.

☑ If you cannot open a case, contact your system administrator and tell them the case name you need to open. They can ensure that you have proper access to the network location where the case file is stored.

☑ If you are working in a SQL case and a menu item is grayed out, you may not have permission to use that TextMap feature. Contact your system administrator for more information.

To open a local case

1. On the **File** menu, click **Open**, and then select **Computer**.

If you do not have CaseMap Server, click **File**, and then click **Open**.

2. In the **Select Local Case to Open** dialog box, browse to the network directory folder to locate the case you want to open and click on it.
3. In the **TextMap Default Annotation Mode** dialog box, click **Close**.

We recommend you leave the default setting of Manual Mode until you understand and learn how to use Annotation modes. See [About annotations](#).

To open a SQL case

1. On the **File** menu, click **Open**, and then click **SQL Case**.

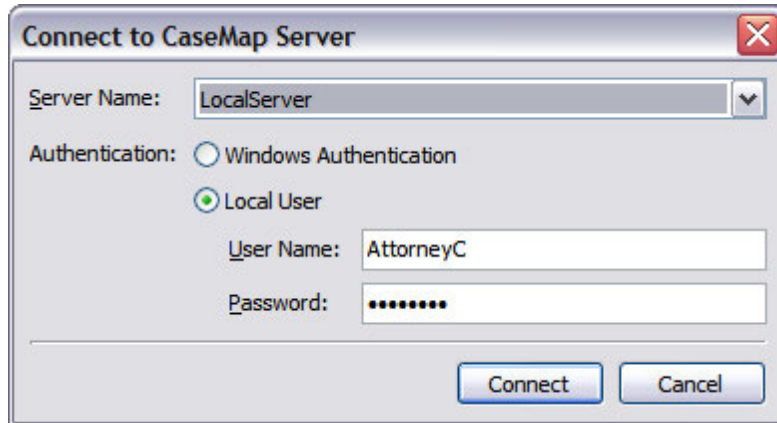
You can also press CTRL + O to open a SQL case.

2. In the **Connect to CaseMap Server** dialog box, select the server you want to use in the **Server Name** list.
3. In the **Authentication** area, select the type of authentication being used to access the SQL case: **Windows Authentication** or **Local User**.

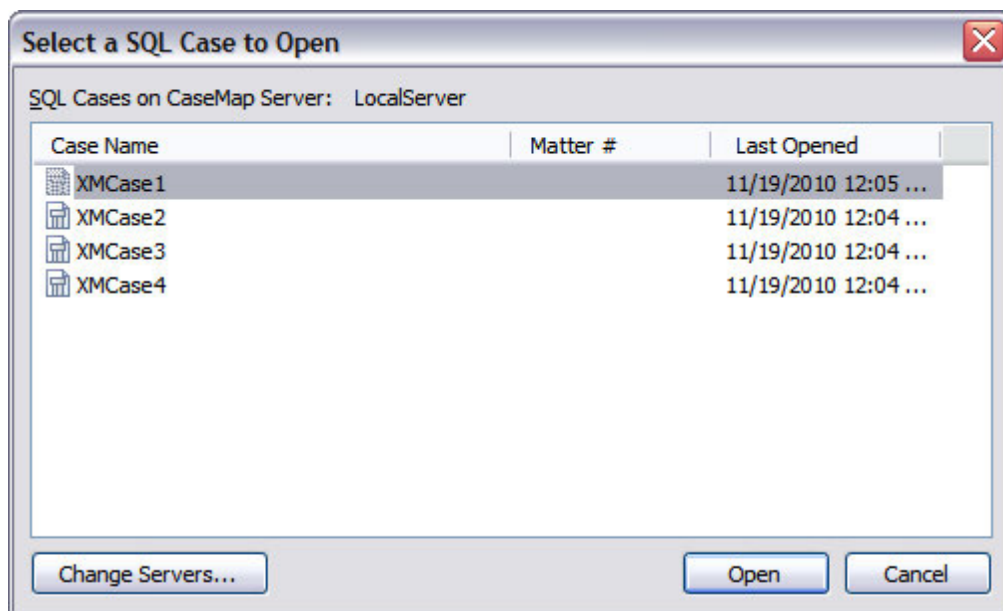
If you select Local User, then type in your user name and password.

If you do not know which authentication method to use, contact your system administrator.

4. Click **Connect** to continue.



5. In the **Select a SQL Case to Open** dialog box, click on the case you want, then click **Open**.



The selected SQL case now opens in TextMap.

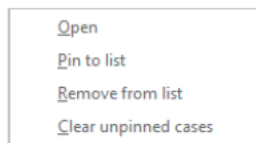
6. In the **TextMap Default Annotation Mode** dialog box, click **Close**.

We recommend you leave the default setting of Manual Mode until you understand and learn how to use Annotation modes. See [About annotations](#).

To open recently viewed cases

1. On the **File** menu, click **Open**, and then select **Recent Cases**.

2. In the **Recent Case** area, click on the case to open. You can also right-click on the case to be opened and from the **Recent Cases** submenu, click **Open**.



A pinned case, designated by a  identifies cases that were recently viewed and added to the top of the **Recent Cases** list.

An unpinned case, designated by a  identifies cases that have not been recently viewed. A thin horizontal line separates unpinned cases from recently viewed cases (pinned).

3. Optional: From the **Recent Cases** submenu, click **Pin to list** to place the selected case to the top of the **Recent Cases** list.
4. Optional: Click **Remove from list** to remove a case from the **Recent Cases** list.
5. Optional: Click **Clear unpinned** cases to remove all cases from the **Recent Case** list.

To close a case

On the **File** menu, click **Close** to display to the Getting Started page.

Related Topics

- [About the Getting Started pane](#)
- [About cases](#)
- [Creating cases](#)
- [Setting/changing case passwords](#)

Setting/changing passwords

Local case passwords can be set for additional security and are distinct to each case. Passwords provide another level of security to your TextMap files.

When you first open a local case assigned to you, your password automatically defaults to blank (no characters). Passwords can be left as blank or be up to 10 characters long. Passwords are not case sensitive. If you forget your password, you need to call CaseMap Technical Support to have them reset it for you.

 We recommend that you apply case security at the network folder level. This allows users to keep the default password set to blank, but ensures case security where the case is saved. See Managing case staff.

✍ If you are opening SQL case for the first time, you must use the password provided by your system administrator. You can change your SQL case password after your first login.

💡 If you have TextMap installed on your machine, you can open the example case, Hawkins v. Anstar, without a log on and start experimenting with TextMap in conjunction with the Getting Started tutorial.

To set or change a case password

1. On the **File** menu, click **Case Setup**, and then click **Change Password**.

If you already have a password, type in the old password in the Old Password box.

2. In **New Password** box, type in your password.
3. In the **Confirm Password** box, type in the same password.
4. Click **OK**.
5. In the message, click **OK**.

The next time you open the case for which you set the password, you will see a Case Log On dialog box. Select your name from the Staff Member list and enter your password to access the case.

Related Topics

[Opening cases](#)
[Creating cases](#)
[Adding users to cases](#)
[Managing case staff](#)

Working with Cases

About cases

A TextMap case is created for each case that your organization works on. A TextMap file is a database that stores all electronic transcript files related to the case. You can create as many TextMap cases as needed to organize your cases. You can also store as many transcripts as you need in each case.

TextMap cases are created using the New Case Wizard, which guides you through answering all the questions needed to create the file. Some of your answers to the New Case Wizard will display within the software application and on reports.

- **Case Name** is the name of the case you are working on. This name is provided on the title

bar within the application and on reports that you create.

- **Organization Name** is the name of the organization that is working on the case. This name is listed on reports that you create. TextMap retains the information entered in this box the next time the New Case Wizard is run. If you type over the information in this field, your new entry replaces the highlighted text.
- **File Name** is the name of the file you open whenever you want to open the case. Make sure that the case file name is unique and specific to the case on which you are working. We recommend that you do not use any punctuation in the case file name except the underscore. You cannot use apostrophes, colons, quotation marks, slashes, or asterisks.

Case files are identified by the column icon and have a file extension of .txmap.

TextMap can only have one case open at a time within an active application window. If you need more than one case open, you can open other instances of TextMap. Case names display in your Windows Title and Status bars so you can differentiate them while working.

TextMap cases are used by multiple staff. Store the case in a shared location on a network drive so more than one staff member can work on annotating and summarizing depositions and transcripts in the case file at the same time.

Related Topics

- [Creating cases](#)
- [Adding users to cases](#)
- [Entering case properties](#)
- [Copying cases](#)
- [Moving cases](#)
- [Deleting cases](#)

Creating cases

Each case you want to include in TextMap requires its own case file. A new case can be created quickly so you can add case staff and initial case data within minutes. TextMap's New Case Wizard provides you with a default new case template that accommodates most of your data entry needs. The example case, Hawkins v. Anstar, uses a new case template.

The case file name is the name of the case database file that is saved to your machine or in a network folder. The default location for case storage is the C:\Users\[User ID]\CaseSoft\TextMap folder on your hard drive. For other users to access the file, it must be stored in a network folder.

- ☑ TextMap cases hosted on CaseMap Server (SQL cases) must be created by a system administrator. For more information on how to create SQL cases, refer to your CaseMap Server documentation.
- ☑ New cases are not protected by passwords until you or other users create them. Passwords automatically default to blank, so you would simply type a password and verify

it, and then click OK to save it. If you forget your password, you need to call CaseMap Technical Support to have them reset it for you. See [Changing case passwords](#) and [Managing case staff](#).

To create cases

1. On the **File** menu, click **New**, and then click **Local Case** to launch the **New Case Wizard**.

You can also open the New Case Wizard by clicking New Case on the Getting Started pane.

2. On the **New Case Wizard's Welcome** page, click **Next**.

The Case Setup page opens.



3. In the **Case name** box, type in the case name.

 We recommend that you do not use any punctuation in the case file name except the underscore. You cannot use apostrophes, colons, quotation marks, slashes, or asterisks.

4. In the **Organization** box, type in the organization name, and then click **Next**.

The Case File page opens. The File Name is automatically filled in with the case name.

5. In the **File Name** box, substitute underscores for spaces in the case name so that the result is similar to: Plaintiff_vs_Defendant.

New Case Wizard

Case File
This information is used to determine where to save your case file.

Enter a name for the case file.

File name: Planitiff_s_Defendant

Browse to the folder where the case should be saved.

C:\Users\hammonrx\Documents\CaseSoft\TextMap Browse...

< Back Next > Cancel

6. Click **Browse** to navigate to the network folder where you want to save case files, and then click **Next**.

The case file name is the name of the case database file that is saved to your machine or in a network folder.

The default location for case storage is the C:\Users\[User ID]\CaseSoft\TextMap folder on your hard drive. For other users to access the file, it must be stored in a network folder.

7. In the **Case Staff Support** page, choose one of the following:
 - Click No if you are the only person accessing this case or if you want to add case staff later in Tools > Case Staff.
 - Click Yes if you want to add case staff now. In the Name field type in your first and last name.
If you click Yes, the Additional Staff members page displays so you can type in case user names here.
8. Click **Next** to continue.
9. On the **Completing the New Case Wizard** page, click **Finish**.

Your new case automatically launches so you can begin working with it. A TextMap message displays, stating that you do not have any transcripts in your case.

10. In the message, click **OK**.

You are now ready to add case users or import transcripts in your new case.

Related Topics

[About cases](#)
[Entering case properties](#)
[Copying cases](#)
[Moving cases](#)
[Deleting cases](#)
[Adding users to cases](#)
[Setting/changing passwords](#)

Entering case properties

Once you have created a case, you can enter or edit general case details for reference purposes or modify the files paths for exhibits and videos. The case file path is read only.

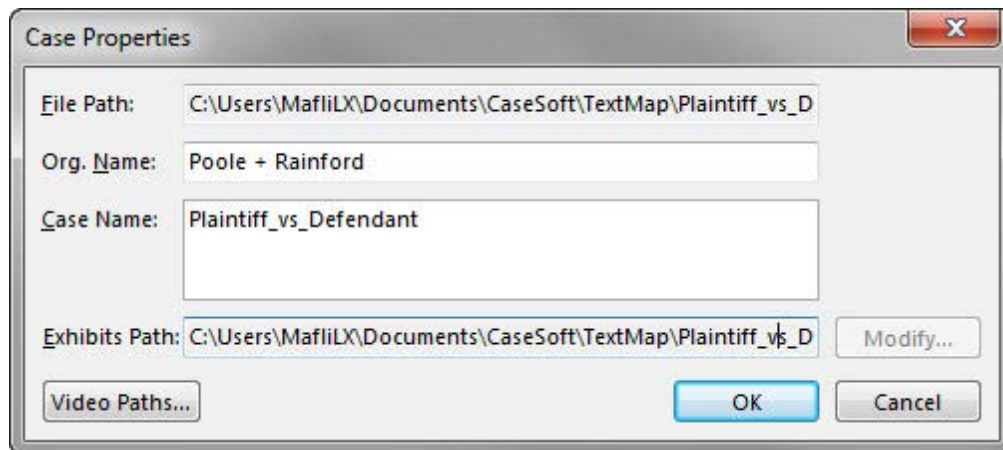
For local cases, TextMap automatically imports exhibits to a subfolder where the case file is stored. This folder may be on your desktop or on your network if other users are accessing case exhibit files. For SQL cases, you can specify the network folder where you want to store exhibit files. See [Changing the exhibits folder path for SQL cases](#).

The video path is where TextMap looks for video files. The Case Video Paths dialog box allows you to add additional file paths to search other locations on your system or network where videos might be stored. See [Changing video paths](#).

 You cannot edit Case Properties for SQL cases. You can however change the Exhibits Path by clicking the Modify button and selecting the network folder you would like to use.

To enter case properties

1. On the **File** menu, click **Case Setup**, and then click **Case Properties**.
2. In the **Case Properties** dialog box, verify the file path where the case is saved.



3. In the **Org. Name** and **Case Name** fields, type or edit these entries.
4. Click **OK** to save your changes.

Related Topics

[About cases](#)
[Creating cases](#)

Copying cases

You can copy cases to create custom templates or save a copy of the case for backup purposes. Cases must be closed before you can create a copy of them.

You also can create a replica copy using the Create Replica Wizard. A replica case can be save to a file or a zipped file, and you can attach either to an email. See [About replicating/synchronizing cases](#).

To copy cases

1. On the **File** menu, click **Open**.
2. In the **Open** pane, select **Computer** or **SQL Case** as applicable to open the storage location of the case to be copied.
3. In the **Open Case** dialog box, right-click on the case you want to copy, then click **Copy**.
4. Navigate to the folder where you want to save the copy, then right-click and click **Paste**.
5. Double-click on the case name to rename it or add the word "copy" to the case name.

6. Click **Open** to launch the case copy.
7. If you do not want to work in the case at this time, click **File** and then click **Close**.

Related Topics

[About cases](#)

[Creating cases](#)

About replicating/synchronizing cases

Creating replica cases

Moving cases and files

Local cases need to be stored in network folders to ensure that other users can access them in TextMap. When you move a case to another network directory location, you may risk losing links from the case to attached files/documents. The case file and case documents, exhibits, and videos are often stored in separate folders.

If you are planning to move a case file to another network folder, you need to change the file paths to all linked documents, exhibits, and videos. You do not need to change the file path if you imported an .xmef file where the path is using the %CASE_EXHIBITS_PATH%, and the user copies the entire exhibits folder.

To ensure case integrity when moving local case file folders, use the Change Paths Wizard accessible by clicking Case Tools > Linked Exhibits > Change Paths. See [Changing exhibit file paths](#) and [Changing video file paths](#). For SQL cases, see [Changing the case exhibits path](#).

 To check the integrity of linked exhibits and documents for your case, [Verifying linked exhibits](#).

Related Topics

[Entering case properties](#)

[Linking exhibits to transcripts](#)

[Changing exhibit file paths](#)

[Changing the case exhibits path](#)

[Changing video file paths](#)

[Editing exhibits](#)

[Verifying linked exhibits](#)

Deleting cases

If you need to delete a case, you may want to store a copy in an archive folder on your network. Once you delete a case, you cannot retrieve it. All cases and content are erased from TextMap.

To delete a case

1. On the **File** menu, click **Open**.
2. Navigate to the folder location where the case you want to delete is stored.
3. In the **Open Case** box, right-click on the case and click **Delete**.
4. In the **Confirm File Delete** box, click **Yes**.

The case and all its contents are now permanently removed from your network and no longer accessible in TextMap.

5. Click **Cancel** or **Close** to close the **Open Case** window and return to TextMap.
6. In the **Getting Started** pane, right-click on the case in the **Open a case** pane and click **Remove** from list.

Related Topics

[Creating cases](#)

[Copying cases](#)

Adding users to cases

Transcript review often requires a team of staff to help review depositions and transcripts for a case. Having a TextMap license does not allow users to open cases. Staff must be added as users to a case before they can access it within TextMap. New users can be added to a case at any time.

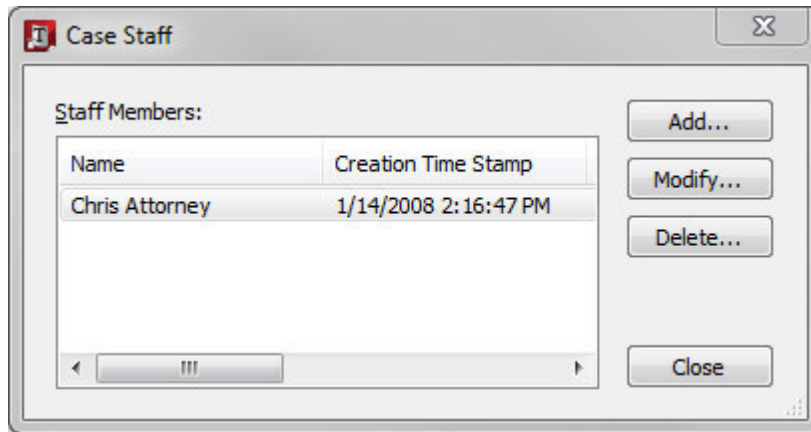
You can add new case staff even if you did not create the TextMap case. Although TextMap suggests typing a first name, followed by last name, your organization can set standards for how staff members' names should be entered. You must have a case open to assign case staff.

There is no limit to the number of users a case can accommodate, though we suggest you keep user access limited to case staff to preserve the integrity of your case data.

-  For more information on how to create SQL cases, refer to your CaseMap Server documentation. You cannot add, modify, or delete users for SQL cases in TextMap. Managing SQL case staff is done in the CaseMap Admin Console.

 To add case users

1. On the **File** menu, click **Case Setup**.
2. Under the **Staff Administration** area, click the **Edit Staff** link to open the Case Staff dialog box.



The Case Staff dialog box opens. Notice that the user name you used to log on already displays in the Case Staff box.

3. Click **Add**.
4. In the **Add Staff Name** box, type in the user name, and then click **OK**.

A message states that the password for this user is <blank>.

Click the Modify button to edit the user name.

5. In the message about the blank password, click **OK**.

The Case Staff dialog box now lists the new staff member.

6. In the **Case Staff** dialog box, click **Close**.

The new user can set a password as soon as he or she logs into the case.

You can continue adding users to the case in this same manner any time.

 Related Topics

[Creating cases](#)

[Deactivating or deleting users](#)

[Setting/changing passwords](#)

Managing case staff

Deleting users

If you need to permanently remove a user from a case, you can simply delete them. Deleted users are no longer able to open the case.

To delete a user

1. On the **File** menu, click **Case Setup**.
2. Under the **Staff Administration** area, click the **Edit Staff** link to open the Case Staff dialog box.
3. In the **Case Staff** dialog box, click on the user you want, then click **Delete**.
4. In the message to delete the user, click **Yes**.

The user is now permanently deleted from the case.

5. Click **Close** when you are finished.

Related Topics

[Adding users to cases](#)

[Managing case staff](#)

Creating Case Issues

About case issues

If you are using TextMap and CaseMap together you can import your issue outline from a corresponding CaseMap case and then create categorizing issues, like Background, that are only used in the corresponding TextMap case. If you are using TextMap as a stand-alone transcript summary tool, you can quickly create an issue outline from scratch.

In TextMap, all issues are initially set to the default color yellow. You can assign each issue a color so that it can be easily identified when scrolling through the transcript. For instance, you could color code all research items red to be easily recognizable. You can also move topics around in an issues list, arranging issues in a different order. And you can create sub-issues or child issues of the parent issue.

10	A. Correct.
11	Q. And your testimony is that the physical
12	evidence showed the likelihood that water was running
13	downward.
14	A. It started in the master bathroom upstairs.
15	Q. Okay. I'm going to ask you some questions on
16	coverage issues. What type of policy was involved here;
17	do you know?
18	A. Elite II.
19	Q. Okay. Can you give me a little education on
20	that, what type of policy that is, how it works, briefly?
21	A. I believe it was an Elite II. I said that
22	pretty quick, but --
23	Q. That's all right.
36:1	A. Assuming that they had a homeowners association
	and not a condo association, it might have been a unit
2	owners policy. Do you have that letter?
	Q. Yes.
3	A. It's an Elite policy.
4	Q. Okay. Can you just tell me what typically
5	would be covered in that type of policy?
6	A. It's an all-risk policy unless it's excluded
7	specifically.
8	Q. What type of water loss would be covered in
9	Mr. Hawkins'?

Once issues are created and coded by color, you can issue-code annotations. Annotations can be linked to one or more case issues. See [Creating annotations](#). Color-coded passages display in reports in color. Reports can be filtered so only annotations associated with specific issues are included. See [Printing annotation reports](#).

When searching transcript annotations, you can narrow your search by selected issues in the Search pane. See [Running full-text searches](#).

Related Topics

- [Creating case issues](#)
- [Importing case issues](#)
- [Deleting case issues](#)

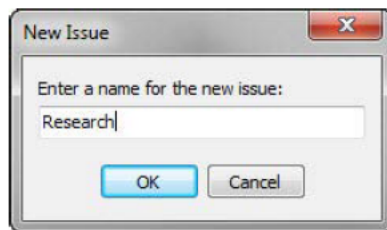
Creating case issues

New case issues are automatically assigned the default color of yellow. You can change the default color in the Color list in the Case Issues dialog box.

Organize your case issues by adding sub-level issues to parent or primary level issue. Color-coding issues helps you identify annotations that are linked to each issue, especially when there are overlapping annotations in a particular section of a transcript. See [Linking issues to annotations](#).

To create case issues

1. On the **File** menu, click **Case Setup**, and then click **Case Issues**.
2. In the **Case Issues** dialog box, click **Add** .
3. In the **New Issue** dialog box, type in the name of the issue, then click **OK**.

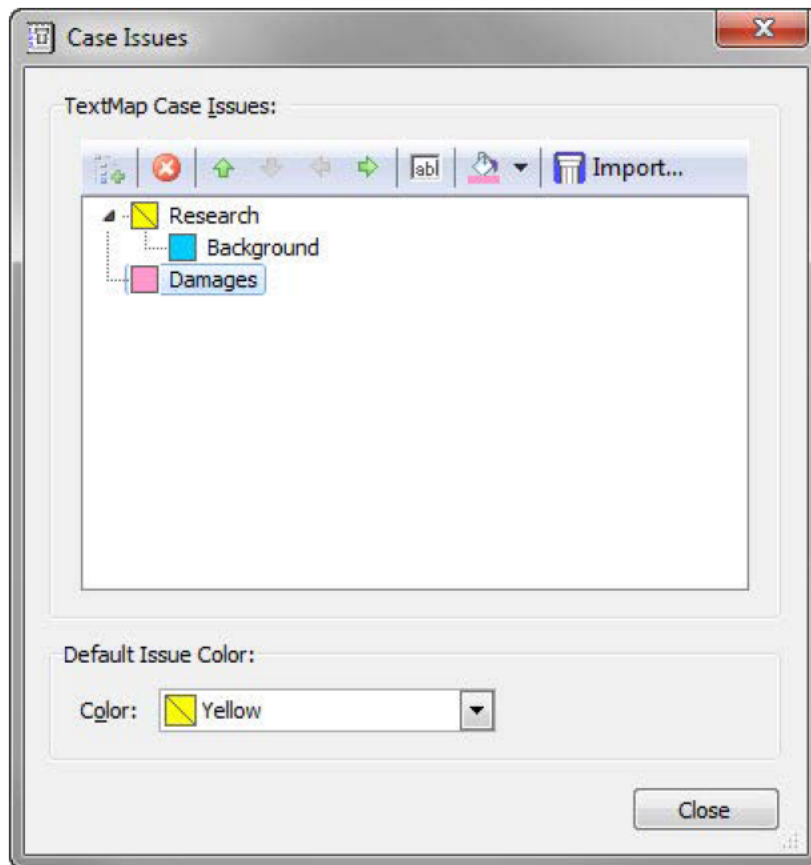


The new issue displays in the TextMap Case Issues list in the default issue color of yellow.



To edit or rename an issue, click on the issue and then click the Rename icon .

4. Continue adding case issues until the issues list is complete.



You can return and add new issues here at any time.

5. Click on an issue and then click the **Demote** icon  to create a sub-level or child issue like Background.

Click the Move Up, Move Down, Promote or Demote icons to organize the issues list.

 If you right-click on an issue in the Case Issues dialog box, a submenu displays with the same options available on the Case Issues toolbar.

6. Click on an issue and then click on the arrow next to the **Color** button .
7. In the color palette, click on the new color you want to use for this issue.

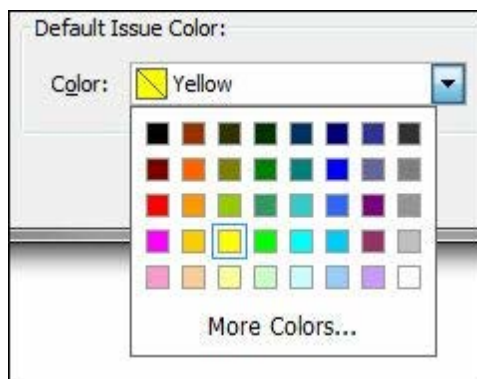


All annotations linked to this issue will display in the transcript in the selected color. Transcripts with overlapping annotations will display color bars to the right of the transcript for each linked issue, so you can easily identify where overlapping annotations occur.

8. Click **Close** when you are finished.

To change the default issue color

1. On the **File** menu, click **Case Setup**, and then click **Case Issues**.
2. In the **Color** list, under **Default Issue Color**, click on the color you want.



3. Click **Close** to save your changes.

Related Topics

[About case issues](#)

[Importing case issues](#)

[Deleting case issues](#)

Importing case issues

If you are using TextMap and CaseMap together you can import your issue outline from a corresponding CaseMap case. You must have the corresponding CaseMap case open in order to complete this process.

If you have already imported issues from the CaseMap case into TextMap, any changes in the CaseMap issue hierarchy will not be synchronized in the TextMap case issue list until you re-import the CaseMap issues into the TextMap case. During the import, TextMap tries to match the issues already imported from CaseMap using issue short names. The import will only add new issues in TextMap.

If you rename an issue that was imported from CaseMap, it will not be sent back to CaseMap as a linked issue. When you use the Send to CaseMap utility, TextMap only recognizes linked issue names that are identical to the names created in and imported from CaseMap. If you

change the name of an imported issue it will not be recognized or linked to your fact record in CaseMap. TextMap issue names must match the short name of a CaseMap issue (no spaces).

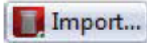
Once case issues are imported, you will need to change the issue color for each so linked annotations can be distinguished by issue color when viewing the transcript.

- ✍ Importation of issues from CaseMap is a one-way street. Issues added in CaseMap and linked to annotations in TextMap will be sent back to CaseMap as Linked Issues on new facts created from annotations in TextMap. TextMap-generated issues are not recognized by CaseMap.

The import/export structure is useful, especially if you create issues in TextMap like Background or Possible Impeachment that are not related to the legal claims set forth in CaseMap's Issues spreadsheet. In Annotation Digest reports generated in TextMap, you can filter for annotations linked to any of the TextMap issues — those imported from CaseMap and those created in TextMap.

- 💡 If you want to ensure your TextMap issues are sent to CaseMap as linked issues in a new fact record, then add new issues you want in your TextMap issue outline into the CaseMap Issues spreadsheet first. Next import issues from CaseMap into your corresponding TextMap case. Any new CaseMap issues will be imported into TextMap and added to the bottom of the case issues outline.

To import case issues

1. On the **File** menu, click **Case Setup**, and then click **Case Issues**.
2. In the **Case Issues** dialog box, click the **Import** icon .
3. In the message box, click **Yes**.

Apply issue colors to each imported case issue as needed.

4. Click **Close** when you are finished.

Related Topics

[About case issues](#)

[Creating case issues](#)

[Deleting case issues](#)

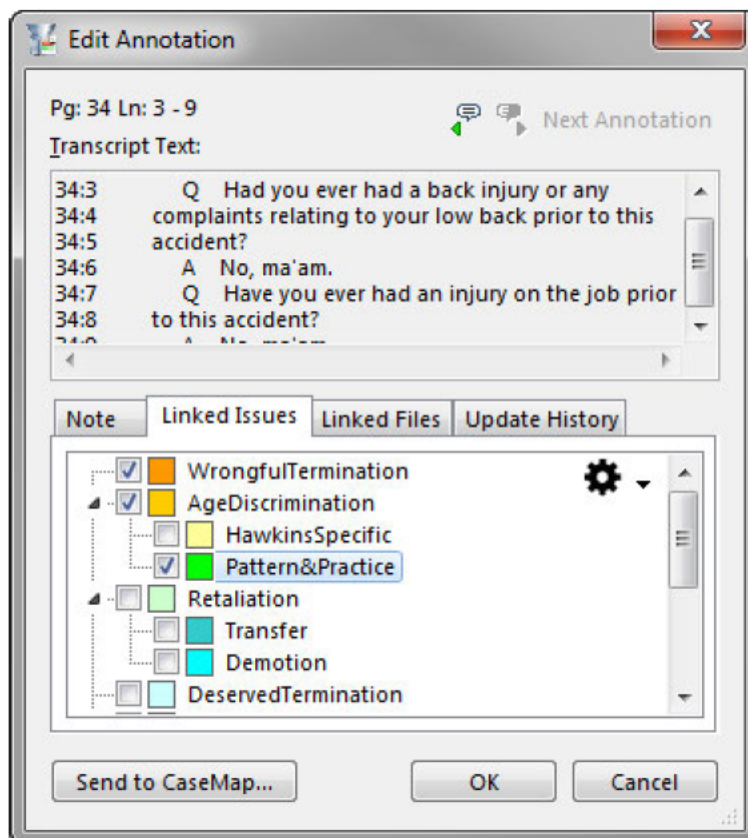
Linking issues to annotations

Once you have created your case issues list, you can issue-code any existing annotations already applied to your transcripts.

However, it is also easy to link issues to annotations while you are annotating. See [Creating annotations](#).

To link an issue to an existing annotation

1. In the **Annotations** pane, double-click on the annotation for which you want to apply an issue.
2. In the **Edit Annotation** dialog box, click the **Linked Issues** tab.



3. On the **Linked Issues** tab, select the check boxes for each issue and/or sub-issue that applies to the annotation.

The Linked Issues tab automatically displays the last issue selections to minimize issue selection when creating annotations.

Click on the Issues Option button  and select one of the following:

- Select All Issues to place a check mark beside all issues
- Deselect All Issues to remove the check mark beside all selected issues
- Manage Issues to open the Case Issues dialog box.

 If an annotation is linked to more than one issue, the color of the issue that's the highest in the issue outline hierarchy (that is not the default color) will be applied to the annotation.

4. Click **OK** to save your changes.

The selected issues now display in the Linked Issues column in the Annotations pane.

Related Topics

[About case issues](#)

[Creating case issues](#)

[Creating annotations](#)

Deleting case issues

If you want to delete a case issue, you first need to verify whether the issues is currently linked to any transcript annotations. If the issue is linked to annotations, then you must transfer the annotations to another case issue before deleting the issue you want removed from the issue list.

This process is managed by the Delete Issue Wizard, which offers you the option of moving the links to an existing issue or deleting the annotation links to the case issue you want to delete. The wizard displays how many annotations are linked to the issue.

Deleting a case issue linked to an annotation will not delete the annotation. The annotation color will then change to the selected default color.

You cannot delete a parent issue that has sub-issues. You must first move any annotation links to another issue and then delete the sub-issues.

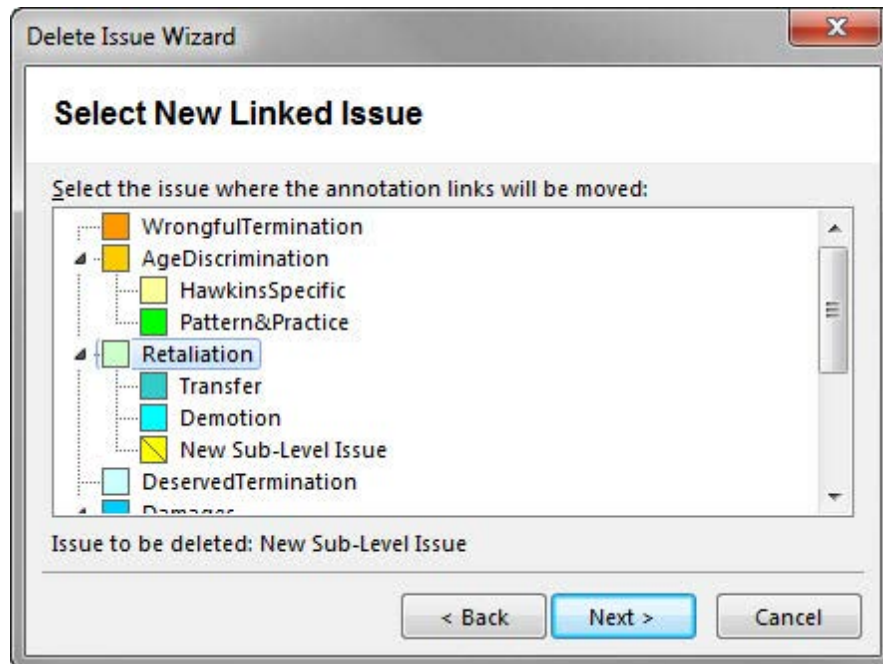
To delete a case issue

1. On the **File** menu, click **Case Setup**, and then click **Case Issues**.
2. In the Case Issues dialog box, click on the case issue you want to delete.
3. Click the **Delete** icon .
4. In the message box, click **Yes** to delete the issue.

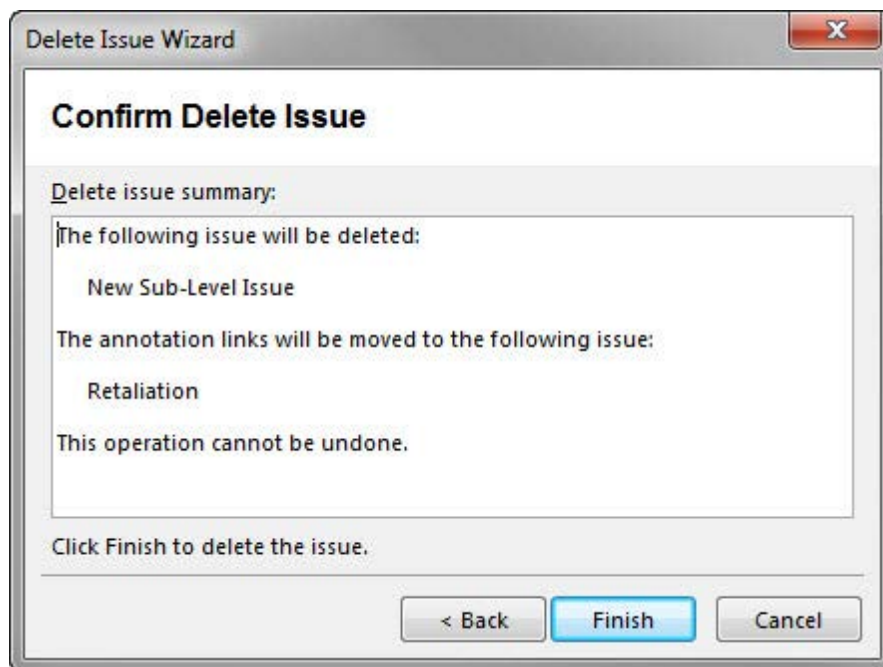
If the issue is linked to annotations, the Delete Issue Wizard launches so you can move or delete annotations links.

To move links to another issue

1. On the **Welcome** page, click **Move links to another issue**, then click **Next**.
2. On the **Select New Linked Issue** page, click on the issue for which you want to transfer the links, then click **Next**.



3. On the **Confirm Delete Issue** page, verify the information, then click **Finish**.



4. In the **Annotations** pane, verify that the annotation is now linked to the new issue selected.

To delete annotation links

1. On the **Welcome** page, click **Delete annotation links**, then click **Next**.
2. On the **Select New Linked Issue** page, click on the issue for which you want to transfer the links, then click **Next**.
3. On the **Confirm Delete Issue** page, verify the information, then click **Finish**.
4. In the **Annotations** pane, verify that the annotation is now linked to the new issue selected.
5. In the **Case Issues** dialog box, click **Close**.

Related Topics

[About case issues](#)

[Creating case issues](#)

Importing Data

About importing data

TextMap organizes imported transcripts and depositions into a centralized electronic case where you and other case staff can share comments, insights, research ideas, notes, links, and documents. Once the transcripts and documents are added to a TextMap case, they are in one location that makes it easy for you to find topics of interest, mark interesting passages, and link to files. There is no limit to the number of files or size of files that you can import into a TextMap case.

When transcripts and documents are imported, TextMap tracks words and their locations in a list called a case index. The case index alphabetizes words in all of the transcripts and also contains hyperlinks to the locations in the transcript where the words display. Not all words are included in the case index: the most common ones, such as and, or, the, and but are not in the case index. See [About the case index](#).

TextMap locates the first date in a transcript or document and uses that date in the Transcript Import Preview dialog box. TextMap recognized dates in the DD/MM/YYYY format. For example, TextMap recognizes both 01/20/99 and January 20, 1999.

The most common way to import information into TextMap is by importing a file in an ASCII text file. This allows the line numbering and page numbering of the original transcript to be the same as the transcript inside TextMap. If you are receiving transcripts in a Binder format, you can open the file and save it as a text file for importing into TextMap.

You can also import the following file types:

- .mdb (Sanction)
- .pcf (LiveNote Portable Case File)

- .pdf (Adobe Portable Document Format)
- .ptf (LiveNote Portable Transcript File)
- .txt (Amicus)
- .txt (Summation)
- .xmef (TextMap Evidence Format)
- .xmptf (TextMap Portable Transcript File)

✍ TextMap does not directly import files provided in RealLegal E-Transcript Binder Format (.ptx). Open files in .ptx format using Legal Binder or Viewer, and then save the transcripts as text (.txt) files. You can then import the new .txt files. Formatting does not change in this process.

TextMap also has a feature that allows you to import information from a software Clipboard to TextMap. This allows you to import information from many file types into TextMap. See [Importing files from a Clipboard](#).

You can also update or append existing transcripts in the case. See [Updating or appending transcripts](#).

To learn more about importing other data, see the following topics:

- [Importing annotations](#)
- [Importing data from an iPad](#)
- [Importing exhibit packages](#)
- [Updating or appending transcripts](#)
- [Batch importing cases](#)
- [About CaseViewNet](#)

Related Topics

[Importing transcripts](#)
[Importing files from a Clipboard](#)
[Updating or appending transcripts](#)
[Batch importing cases](#)

Importing transcripts

Once you've created a case, you must import transcripts into it before you can begin to search them to make annotations or cull out facts to send to CaseMap. Transcripts display in the main Transcript window (center pane) with page and line numbers displaying in the left margin. The left margin also displays annotation note icons and linked attachments (paperclip icon). Any annotated text that overlaps previously annotated text displays with colored bars to the left of the transcript. See [About annotations](#) and [Creating annotations](#).

When importing transcripts, TextMap scans the first two pages of a transcript to locate a date. TextMap uses the first date it finds as the transcript default date and displays it in the Transcript Import Preview dialog box. This date can be edited if needed. To turn on page number display, click File, click Options, and then click the Transcripts tab. On the Transcript tab, select the Show page number in gutter area check box.

During the import process, you can select the Advanced option in the Transcript Import Preview dialog box to specify any pages to skip as well as set the first page number. The transcript preview automatically displays the page(s) shaded indicating the page(s) are skipped.

Transcript Import Preview

Import File: C:\Users\tillerr\\Desktop\TextMap 9\EPIC 207239 - Import transcripts fo...\deposition of philip hawkins.pdf View...

Transcript Information:

Name: deposition of philip hawkins

Date/Time: 12/10/2000 _: _ Include Date & Time First Page: 2

Comments:

Transcript Preview:

--1 STATE OF FLORIDA
DEPARTMENT OF LABOR AND EMPLOYMENT SECURITY
2 OFFICE OF THE JUDGE OF COMPENSATION CLAIMS
DISTRICT "C"
3
4
5 CLAIM NO: 263-55-6571
6 EMPLOYEE: PHILIP M. HAWKINS
7 EMPLOYER: ABI
8
CARRIER: STATE OF FLORIDA
9
D/A: 12/10/00
10
11
STATE OF FLORIDA)
12 COUNTY OF DADE)
13
14
15 Deposition of PHILIP MARK HAWKINS, taken
16 on behalf of the Employer/Carrier, pursuant to
17 Amended Notice of Taking Deposition, on Thursday,
18 October 21, 2000, commencing at 10:00 a.m., at
19 4741 Atlantic Boulevard, Suite F, Miami,
20 Dade County, Florida, before Cindy Cooker, a Notary
21 Public in and for the State of Florida at Large.
22 ---
23
24
25

2:1 APPEARANCES
2
3
4 PETER S. ARNDT, ESQUIRE
5 Arndt & Arndt
One National Drive
6 Miami, Florida 32202
7 Attorney for Employee/Claimant.
8
9
10 SUSAN A. ONOFREY, ATTORNEY-AT-LAW
11 Onofrey & Straight, P.A.
4700 Ocean Boulevard

Advanced... OK Cancel

- ✔ The creation date of each imported annotation matches the original date in LiveNote, rather than the date and time it was imported.

TextMap also accounts for front and back unnumbered pages during transcript import. Cover sheets, initial pages, end pages and appendices do not affect the numbering of testimony pages. If TextMap detects unnumbered pages prior to the import, you can adjust the number of pages or accept the automatic handling of the unnumbered pages provided by TextMap.

Headers and footers are automatically left out of imported transcripts. For example, if a court reporter uses the bottom two lines of every page for a name and office number, then the actual testimony imported is 23 lines per page instead of 25.

Once a transcript is imported, you can specify a new first page number. Any annotation(s) in the transcript prior to the number change contains the exact text as prior to the page numbering change.

You can also adjust the font size and style for better viewing in the TextMap window. The selected font size and style is applied to all case transcripts. See [Changing transcripts fonts](#).

- ✔ When importing transcripts into a case, the transcripts should be full-sized, single page, and OCRd for best results.
- ✔ TextMap displays a message when the format of the file you are importing doesn't appear to be in a standard court reporting electronic transcript format. If you continue with the import the page breaks and line numbering probably will not match the original document. You're encouraged to discontinue the import and to contact your court reporter to request the transcript in either Amicus® or Summation® format, standard transcript output formats from court reporting software.
- ✔ When importing transcripts into a SQL case, you will not be able to run searches (word searches or advanced queries) until the indexing process is complete. A message box displays to indicate processing status and completion. During the import process, you are able to review and annotate transcripts. However, you and other case staff cannot delete transcripts or synchronize cases. Likewise, you cannot import transcripts while another user is synchronizing a replica case with the master case, or is in the process of deleting transcripts from the case.

To import transcripts

1. On the **Home** ribbon, click **Import Transcript**.

You can also click Import on the File menu, and then click Import Transcripts.

2. In the **Select One or More Transcripts to Import** dialog box, navigate to the folder where the transcript files are stored.
3. Select the transcripts you want to import and then click **Select**.

- 💡 If you want to import more than one file at a time, press the CTRL key while selecting the files you want to import.

The Transcript Import Preview dialog box displays.

The Name box contains the file name of the transcript that you are importing.

Transcript Import Preview

Import File: C:\Users\tillerr\ Desktop\TextMap 9\EPIC 207239 - Import transcripts fo...\Deposition of Philip Hawkins.txt View...

Transcript Information:

Name: Deposition of Philip Hawkins

Date/Time: 12/10/2000 _: ▼ ☒ Include Date & Time First Page: 1

Comments:

Transcript Preview:

1:1 STATE OF FLORIDA
DEPARTMENT OF LABOR AND EMPLOYMENT SECURITY
2 OFFICE OF THE JUDGE OF COMPENSATION CLAIMS
DISTRICT "C"
3
4
5 CLAIM NO: 263-55-6571
6 EMPLOYEE: PHILIP M. HAWKINS
7 EMPLOYER: ABI
8
9 CARRIER: STATE OF FLORIDA
10 D/A: 12/10/00
11
12 STATE OF FLORIDA)
COUNTY OF DADE)
13
14
15 Deposition of PHILIP MARK HAWKINS, taken
16 on behalf of the Employer/Carrier, pursuant to
17 Amended Notice of Taking Deposition, on Thursday,
18 October 21, 2000, commencing at 10:00 a.m., at
19 4741 Atlantic Boulevard, Suite F, Miami,
20 Dade County, Florida, before Cindy Cooker, a Notary
21 Public in and for the State of Florida at Large.
22 ---
23
24
25
2:1 A P P E A R A N C E S
2
3
4 PETER S. ARNDT, ESQUIRE
5 Arndt & Arndt
6 One National Drive
7 Miami, Florida 32202
8 Attorney for Employee/Claimant.
9
10 SUSAN A. ONOFREY, ATTORNEY-AT-LAW
11 Onofrey & Straight, P.A.
4700 Ocean Boulevard

Advanced... OK Cancel

4. In the first **Date/Time** box, notice that the date is automatically filled in for you.
5. In the second **Date/Time** box, type in the time, then select **AM** or **PM** from the list.

Notice that the Include Date & Time box is selected by default. Clear this check box if you do not want the date/time to display in the Transcripts pane along with the transcript name.

6. In the **Comments** box, type in any relevant information about the transcript.
7. In the **Transcript Preview** box, scroll to verify that the transcript displays properly.
8. Click the **Advanced** button to modify page numbering, exclude pages, and format details.

Transcript Import Advanced Options

Page Numbering:

First Page No: 1

Are all pages in the transcript numbered?

☒ Yes

☐ No, there are pages at the front/back without number

No. of pages at front: 0

No. of pages at back: 0

Exclude Pages:

☒ Exclude pages in the front or back of the transcript from being imported

No. of pages at front: 0

No. of pages at back: 0

Transcript Format:

Details:

File Format: ASCII Compressed Format - No Form Feeds

Lines Per Page: 23

Page Count: 44

Header: (none)

Footer Line 1: (456) 123-1234

Footer Line 2: TOM SWIFT COURT REPORTING

Signature: (B961A6E8-EDD5-9CEC-9D2E-3C7404435575)

OK Cancel

9. Click **OK** to continue.

The Transcript Import Preview dialog box is displayed for each transcript you are importing.

10. In the **Transcript Import Preview** dialog box, repeat steps 4-7 for the next transcript.

Notice how a progress filter displays while the case index is created or updated.

Imported transcripts now display in the Transcripts pane with the first transcript content displaying in the TextMap window.

Related Topics

[About importing data](#)

[Importing files from a Clipboard](#)

[Updating or appending transcripts](#)

Importing annotations

The Import Annotations Wizard allows you to import annotations from a comma delimited text file (.csv) file saved from a Microsoft® Excel spreadsheet without having to do it manually. The Import Annotations Wizard can import multiple annotations into multiple, existing transcripts. The wizard imports page/line number and note designations, and allows the ability to link issues to imported annotations so they can be tagged.

In order to successfully import annotations, the .csv file's columns must be in the following, specified order: Transcript Name, Page From, Line From, Page To, and Line To. The file may also include the Notes and Issues column (optional). This list of issues should be separated by semicolons. The wizard's Welcome page includes a link to view a sample import file (shown below).

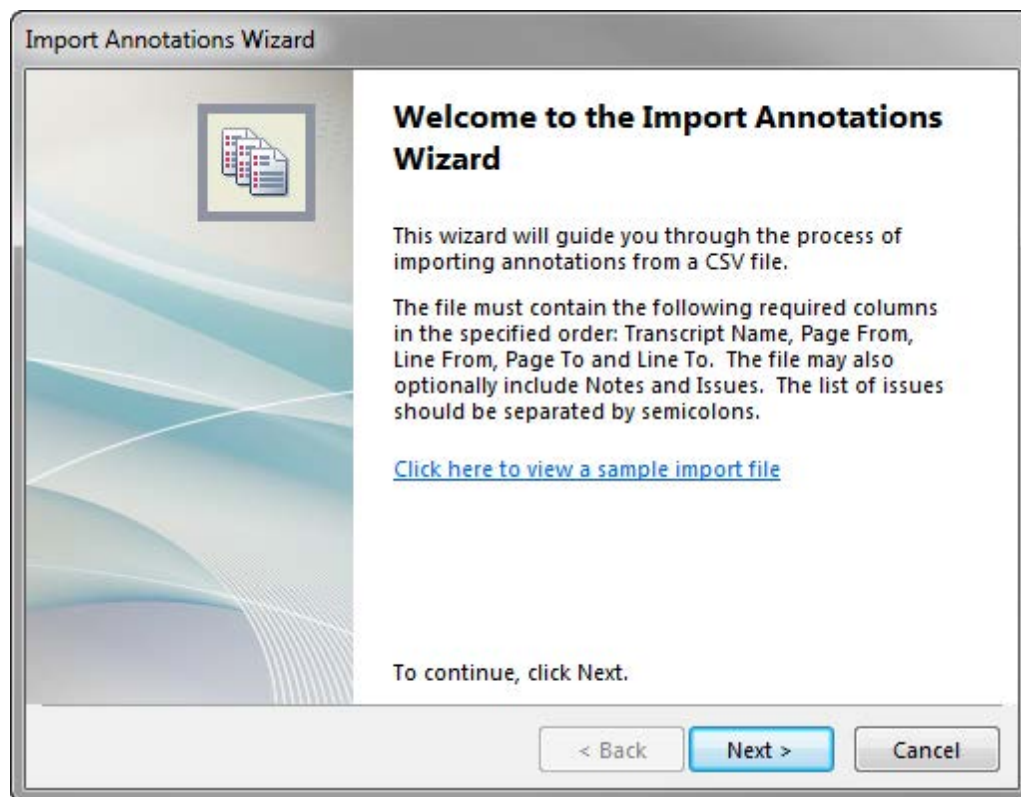
Transcript	Pg From	Ln From	Pg To	Ln To	Notes	Issues
Deposition of P...	30	4	30	11	HawkinsP says t...	Wrt
Deposition of P...	27	6	27	11	HawkinsP does ...	Ret
Deposition of P...	29	1	29	9	HawkinsP's sala...	Der
Deposition of P...	25	24	26	2	Date of surgery	Dar
Deposition of S...	35	15	35	18	Type of policy	Ret
Deposition of S...	36	1	36	7	Homeowner's a...	Der

☑ If you import the same .csv file twice, you will duplicate content in the case. The Import Annotations Wizard will display an Import Errors page if some annotations fail to import. We recommend that you save this information to a file, resolve the errors, and then import the skipped annotations as a separate .csv file.

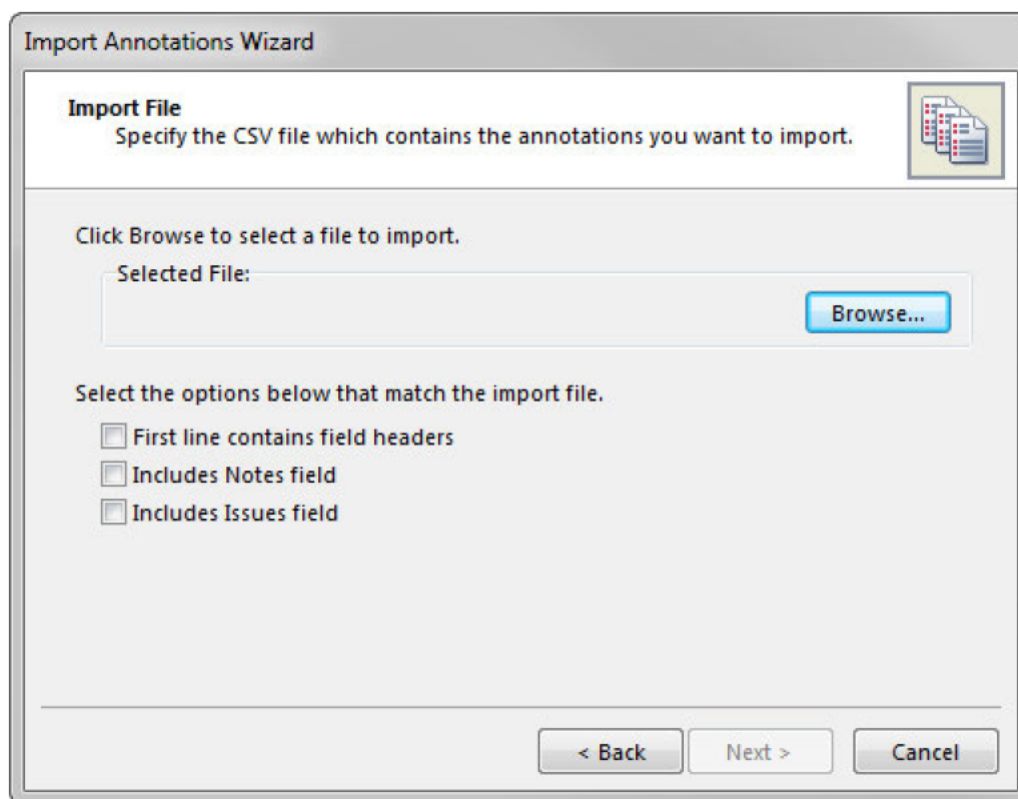
☑ If an annotation in has "Unknown" listed in the Created By column, it may be an imported annotation. These annotations can be assigned to a case user after the import. See [Changing annotation owner status](#).

To import annotations into existing transcripts

1. On the **Home** ribbon, click **More Import**, and then click **Import Annotations**.
You can also click Import on the File menu, and then click Import Annotations.
2. When the wizard launches, click **Next**.



3. On the **Import File** page, click **Browse** to locate the file you want to import.



4. After the selected file and path of the file(s) being imported is displayed in the wizard, select/deselect all applicable options (e.g., First line contains field headers), to indicate what (i.e., notes, issues) is in the file(s) being imported):

First line contains field headers -- The first line of the import file contains the field headers (i.e., Transcript, Pg From, Ln From, etc.) and not the first annotation.

Includes Notes field -- Import file includes a field to list the note(s) associated with each annotation.

Includes Issues field -- Import file includes a field to list the issue(s) associated with each annotation.

-  These options must match what is in the import file in order for the annotations to import correctly. If a check box (e.g., Issues or Notes) is not selected, it will not be displayed in the Import Preview window.

5. Click **Next** to display the Import Preview page.
6. On the **Import Preview** page, review the annotations selected for import, then click **Next** to start the import process.

Import Annotations Wizard

Import Preview
TextMap is ready to import the annotations. Review the data carefully. This operation cannot be undone.

There are 6 annotations in the file to import:

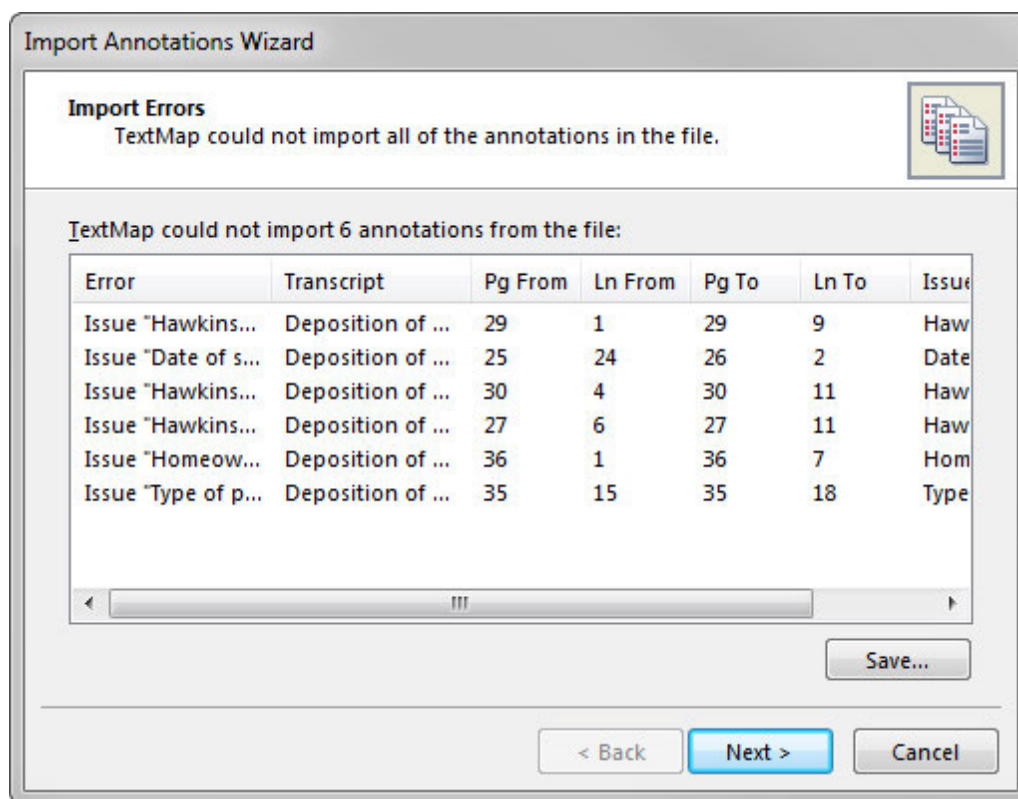
Transcript	Pg From	Ln From	Pg To	Ln To	Issues
Deposition of P...	30	4	30	11	HawkinsP says t...
Deposition of P...	27	6	27	11	HawkinsP does ...
Deposition of P...	29	1	29	9	HawkinsP's sala...
Deposition of P...	25	24	26	2	Date of surgery
Deposition of S...	35	15	35	18	Type of policy
Deposition of S...	36	1	36	7	Homeowner's a...

To start the import, click Next.

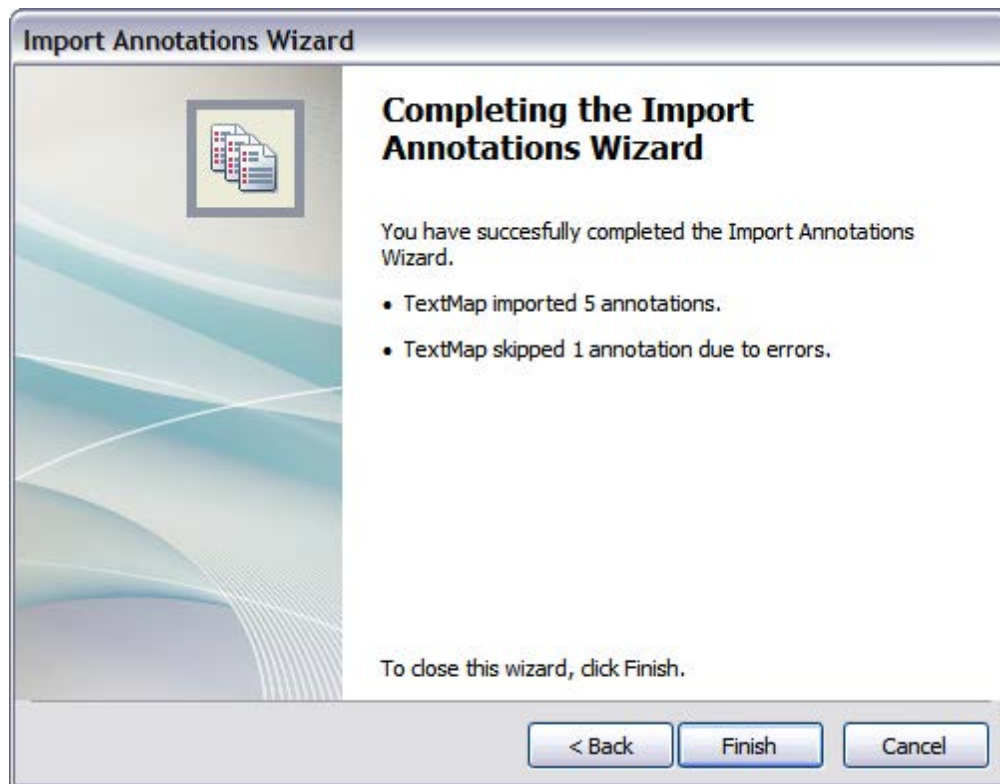
< Back Next > Cancel

 Since the Include Notes field option was not selected in Step 4, only Issues are displayed in the Import Preview window.

If any annotations cannot be imported (e.g., transcripts with the same name), the wizard displays an Import Errors page listing all annotations that did not successfully import.



7. Optional: Click the **Save** button to save a list of the import error list for future reference.
8. Click **Next** to continue.
9. On the **Completing the Import Annotations Wizard** page, review the number of imported annotations and those skipped due to errors, then click **Finish**.



The imported annotations now display in the Annotations pane. When you click on an annotation in the Annotations pane, the transcript displays the annotated content with the applicable issue code color, if issues were included in the .csv file.

Related Topics

[About annotations](#)

[Creating annotations](#)

Importing data from an iPad

The importing process applies any edits you made in the TextMap app for iPad to the master case in TextMap. You must have the corresponding case open in TextMap before you can import updates from the iPad. Only one case user at a time can import updates.

An import confirmation indicates how many new issues and annotations will be added. The message also lists how many annotations have been edited or deleted and how many transcripts in the case are affected by the changes.

During the import process, TextMap will recognize if your updates have already been applied. See the [iPad Import Considerations](#) table for details on how TextMap processes updates in the master case.

You can re-export the case to your iPad if you want to access any case user updates or new transcripts added to the case. Otherwise, you can continue to work on the transcripts you already have on your iPad.

To view data import considerations

Reference the following table for considerations when importing case updates from your iPad.

iPad Import Considerations	
General	Only one case user at a time can import updates. TextMap displays a message if another case user is currently importing updates from the iPad or synchronizing a replica with the master case. You can import updates from your iPad as many times as you want. TextMap will recognize any case data that was already updated or skipped during a previous data transfer. * You may want to email the case to your iPad again if you want access to all case user updates or any new transcripts added to the case. Case updates made on an iPad can be imported into a replica case. TextMap will recognize that the case updates from the iPad were made in the replica when synchronizing the replica with the master case. See About replicating and synchronizing cases. After a significant number of updates are made on your iPad, it's a best practice to import your updates into the master case. This ensures that you and other case users have access to the latest case data at all times. You can choose to skip importing previous updates if the latest update includes all the data you want.
Case Issues	New parent (top-level) issues created on an iPad are added to the bottom of the TextMap's issue outline.
Annotations and Notes	Annotations edited on the iPad but were deleted in the master case will be imported back into the master case. TextMap counts these as new annotations and not edited annotations. Annotations created on the iPad will be skipped during the import if the transcript has been deleted from the master case. The number of skipped annotations displays in a message during the import. Annotations deleted on the iPad will be deleted in the master case, even if the original annotation was edited. The total number

iPad Import Considerations

of annotations deleted across all transcripts will be listed in the import message.

Any annotation issue links that are deleted on the iPad will be deleted in the master case during the import.

Any linked issues added in the master case since case data was exported will be retained in the master case.

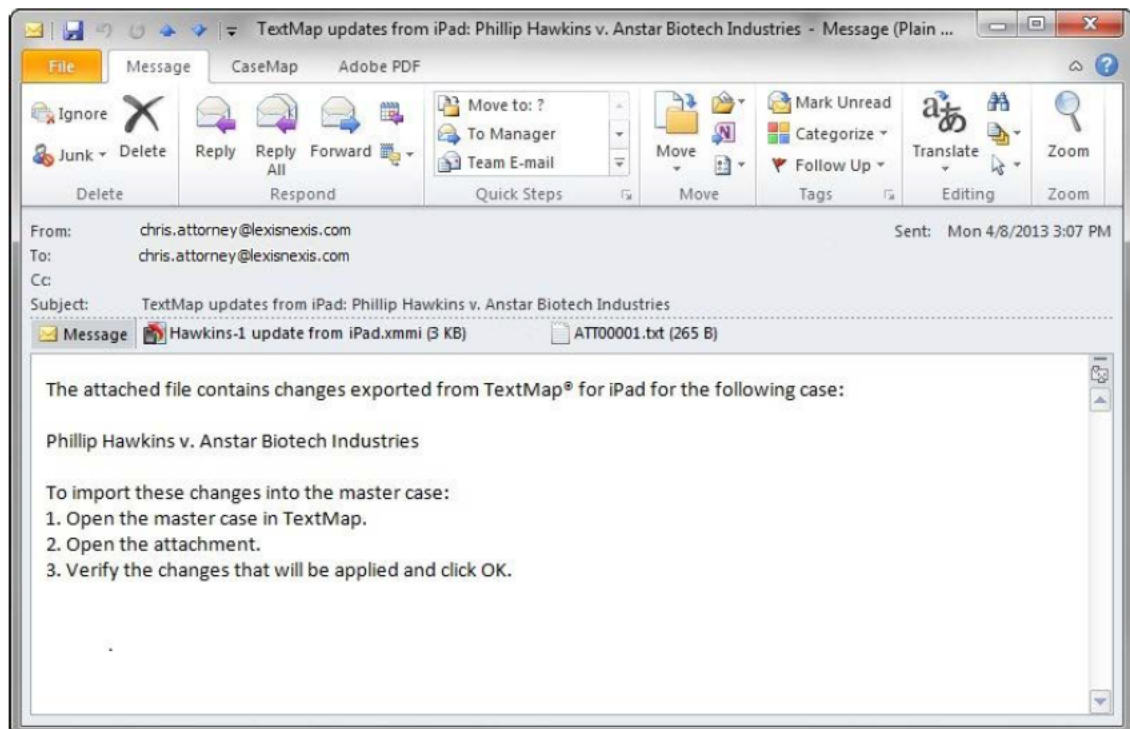
Existing annotations with notes updated on the iPad will override notes made in the master case.

To import TextMap app updates from your email

1. Click **More Import** on the **Home Ribbon**, and then click **Import from iPad**.

You can also click Import on the File menu, and then click Import from iPad.

2. From the **Select TextMap Mobile Import File** dialog box, open the email that contains the case updates that you want to import from the TextMap app.

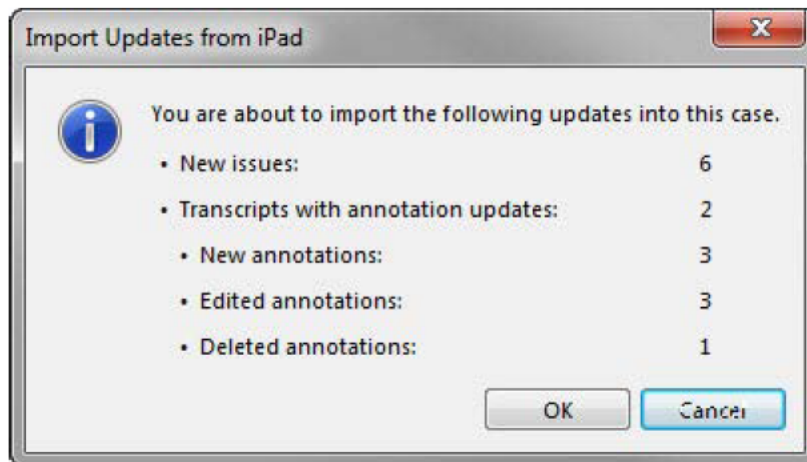


3. Open the master case in TextMap, if it is not already open.
4. Double-click on the email attachment to open it.

5. In the **Opening Mail Attachment** dialog box, click **Open**.

Click **Save** if you want to save the case updates to a file to import later, then close the email.

6. In the **Import Updates from iPad** dialog box, review the issues and annotation updates, then click **OK**.



The imported data now displays in your transcripts in the master case.

To import updates saved to a file

You can also import case updates directly from the .xmml file, if you chose to save the attachment to a folder to import at a later time. If a TextMap case is not already open, a dialog box displays for you to browse to and select the existing or recent case you want to open. Once the case is open in TextMap, the import process automatically starts. If the corresponding TextMap case is already open, click **OK** in the message box to initiate the import.

1. On the **File** menu, click **Import** and then click **Updates from iPad**.
2. In the **Select TextMap Mobile Import File** dialog box, navigate to the folder where the import file is stored.

 You can also right-click on the file in the folder where it is stored and then click **Import** into TextMap or simply double-click on the file to initiate the import.

3. Select the import file and then click **Open**.
4. In the **Import Updates from iPad** dialog box, review the issues and annotation updates, then click **OK**.



Related Topics

About the TextMap iPad app

[Exporting data to an iPad](#)

Importing exhibit packages

TextMap Exhibit Packages (created by TextMap® Exhibit Linker) include a transcript, hyperlinks to exhibits mentioned throughout the text, and the linked exhibit documents. You import an Exhibit Package file (*.xmef) just like any other transcript. All the exhibits and exhibit hyperlinks in the transcript are available instantly.

When you import an Exhibit Package file (*.xmef), the following occurs:

- It creates a folder and is stored in its own folder.
- If the name of the transcript is longer than 80 characters, the folder created will also be truncated at 80 characters.
- When TextMap imports a transcript with a name of one that already exists, it and the associated folder names are made unique by applying a number to the end.
- Invalid characters are not allowed in the transcript name, and will be removed.

You can also import TextMap Exhibit Packages (*.xmef files) with linked exhibits into a SQL case. During the import process, TextMap displays a message for you to select the exhibits path folder for the case, if it has not already been set.

Exhibit files should be saved to a network folder to ensure that all case users have access to the files. You can also set this path in the Case Properties dialog box, if you have permissions to do so. See [Changing exhibits file paths](#). If you choose not to set the exhibit folder path during the import, the transcript will be imported into the SQL case without the linked exhibit

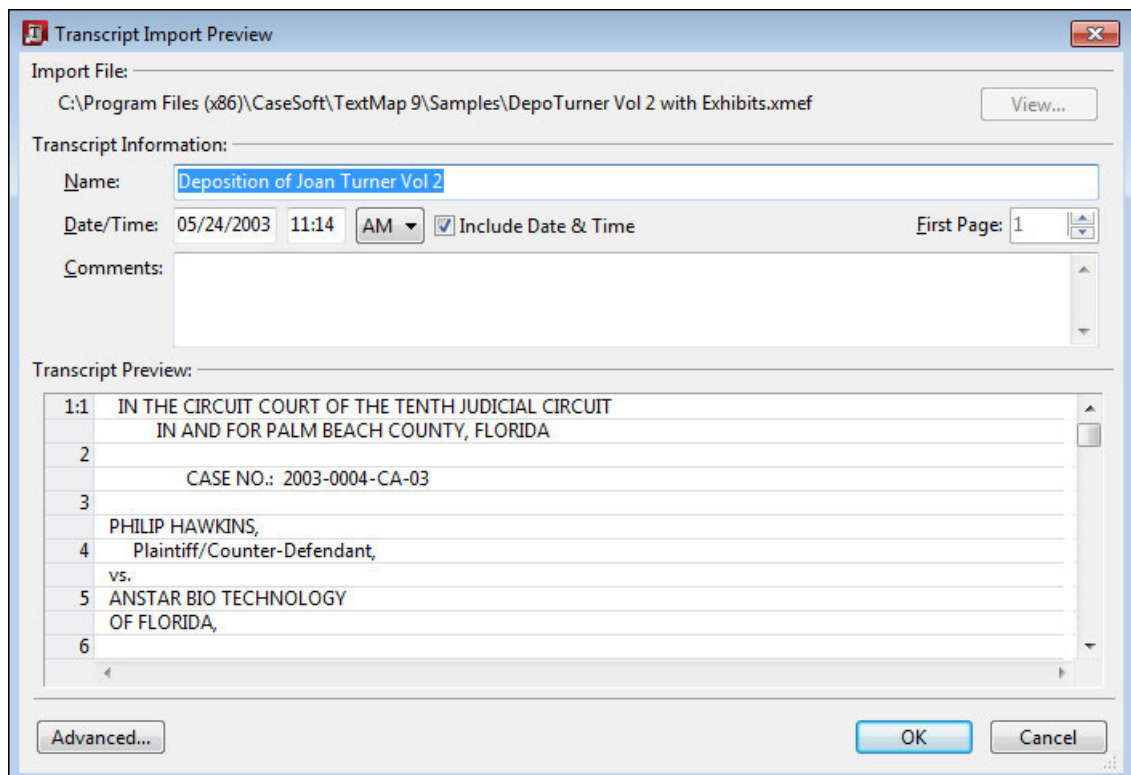
files.

To import exhibit packages with linked exhibits

1. On the **Home** ribbon, click **Import Transcript**.

You can also click Import on the File menu, and then click Import Transcripts.

2. In the **Select one or more Transcripts to Import** dialog box, select the exhibits package that you want to import, and then click **Select**.
3. In the **Transcript Import Preview** dialog box, review the transcript information and type in any comments you want to track regarding the imported files.



Transcript Import Preview

Import File: C:\Program Files (x86)\CaseSoft\TextMap 9\Samples\DepoTurner Vol 2 with Exhibits.xmef View...

Transcript Information:

Name: Deposition of Joan Turner Vol 2

Date/Time: 05/24/2003 11:14 AM ☒ Include Date & Time First Page: 1

Comments:

Transcript Preview:

1:1	IN THE CIRCUIT COURT OF THE TENTH JUDICIAL CIRCUIT IN AND FOR PALM BEACH COUNTY, FLORIDA
2	
	CASE NO.: 2003-0004-CA-03
3	
4	PHILIP HAWKINS, Plaintiff/Counter-Defendant,
	vs.
5	ANSTAR BIO TECHNOLOGY OF FLORIDA,
6	

Advanced... OK Cancel

TextMap searches the transcript and uses the first date it locates to automatically fill in the Date field. You can modify this date, if necessary.

4. Click the **Advanced** button if you want to modify page numbering or review transcript format details.
5. Click **OK** to continue.

When the import process is complete, the imported transcript displays in the Transcripts pane and the exhibit files are copied into the case exhibits folder.

4. In the **Navigation** pane, click the **Exhibits and Video** button to display linked exhibits and other documents included in the exhibit package.

Related Topics

[About exhibits](#)[Using TextMap Exhibit Linker](#)[Changing exhibit file paths](#)

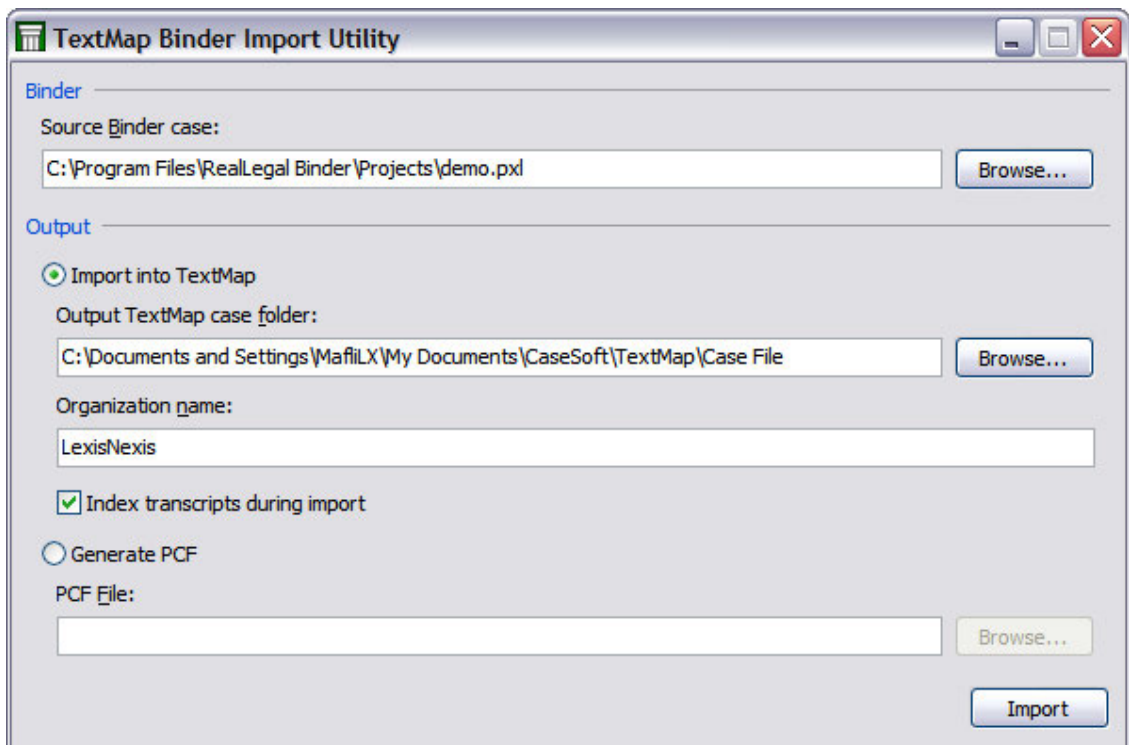
Importing binders

Using the TextMap Binder Import Utility, you can convert and import a binder case from RealLegal Binder directly into your TextMap case file along with any case exhibits (including linked exhibits) or synched video files. The utility supports importing one binder case at a time.

Once you have imported the binder case into TextMap, you can create a case file from it.

To import a binder case

1. Double-click on the **TextMap Binder Import Utility** icon to display the **TextMap Binder Import Utility** dialog box.



2. Next to the **Source Binder case** field, click **Browse** to navigate to the network folder where the binder file (.pxl) you want to import is stored.
3. In the **Select a Binder case** dialog box, click on the binder file you want to import, then

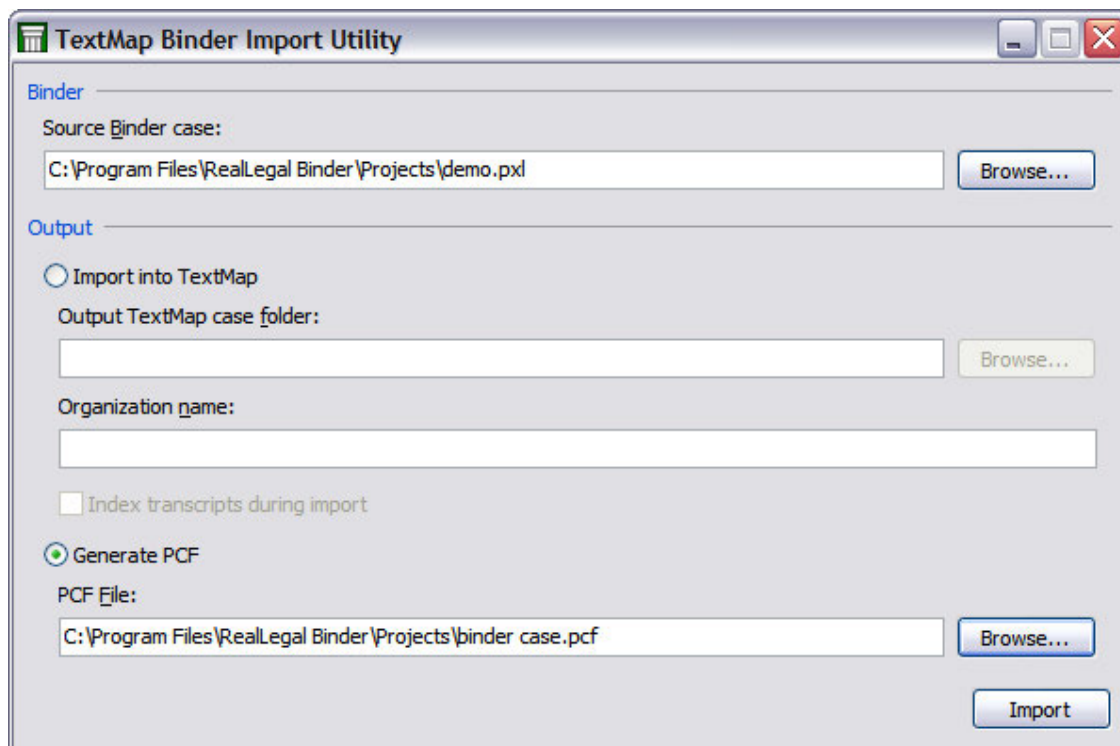
click **Open**.

4. Next to the **Output TextMap case folder** field, click **Browse** to locate the network folder where you want to save the case file (.txmap).
5. In the **Browse For Folder** dialog box, locate the network folder you want to use, then click **OK**.
6. In the **Organization name** field, type in the name of your organization.
7. Select the **Index transcripts during import** check box if you want this option.
8. Click the **Import** button to import the file into your TextMap case.
9. In the message box verifying the import is complete, click **OK**.

The imported case now displays in TextMap.

To generate a .pcf file

1. Double-click on the **TextMap Binder Import Utility** icon to display the **TextMap Binder Import Utility** dialog box.



2. Next to the **Source Binder** case field, click **Browse** to navigate to the network folder where the binder file (.pxl) you want to import is stored.
3. In the **Select a Binder case** dialog box, click on the binder file you want to import, then click **Open**.
4. In the **Output** area, click **Generate PCF**.

5. Next to the **PCF File** field, click the **Browse** button to navigate to the network folder where you want to save the converted binder case file (.pcf).
6. In the **File name** field, type in the name of the file, then click **Save**.
7. Click the **Import** button to convert the binder case to the .pcf file format.
8. In the message box verifying the import is complete, click **OK**.

You can now import the .pcf into TextMap and create a new case with it.

Related Topics

Installing the TextMap Binder Import Utility

Importing files from a Clipboard

Importing transcripts using a Clipboard is not used as often to import files as the Import File(s) method. However, this feature allows you to import content from many software programs such as Microsoft® Word or Outlook, or any text file. It's a great way to add complaints, research copies from the Internet, or even interview notes.

First you must open the electronic file in its original program and copy the contents onto an electronic Clipboard. Then, you import the contents into your TextMap case. When importing content, TextMap limits text to 25 lines per page, which is a common transcript format, but may not match the formatting of the original document. If you send a fact from this type of text file to CaseMap, the page/line reference will not be that of the original document.

- ☑ If you try to save a PDF to a text file using the Save as Text command, the formatting of the original will not match the formatting of the original text file. The discrepancy in content will be detrimental in any situation where you are referring to the original file.

To import files from a Clipboard

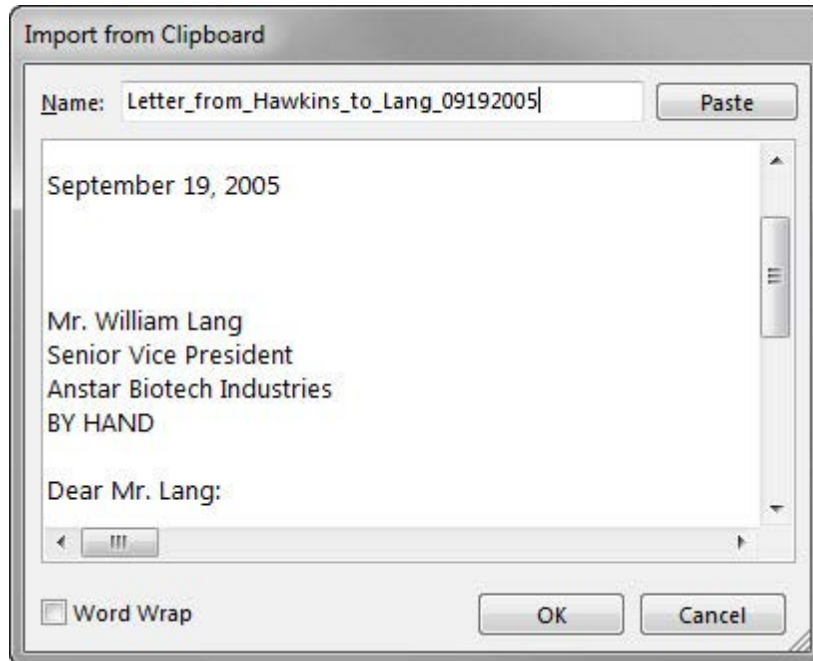
1. Open the electronic file in its native software program, such as Microsoft Word.
2. Press **CTRL+A** to select all text within the document.
3. Press **CTRL+C** to copy the selected text to the Clipboard.
4. Close the file and the software program.
5. In **TextMap**, on the **Home** ribbon, click **More Import**, and then click **Import from Clipboard**.

You can also click Import on the File menu, and then click Import from Clipboard.

6. click **More Import** on the **Home** ribbon, and then click **Import from Clipboard**.

The Import from Clipboard dialog box opens.

7. In the **Name** box, type in a name for the file, then click **OK**.

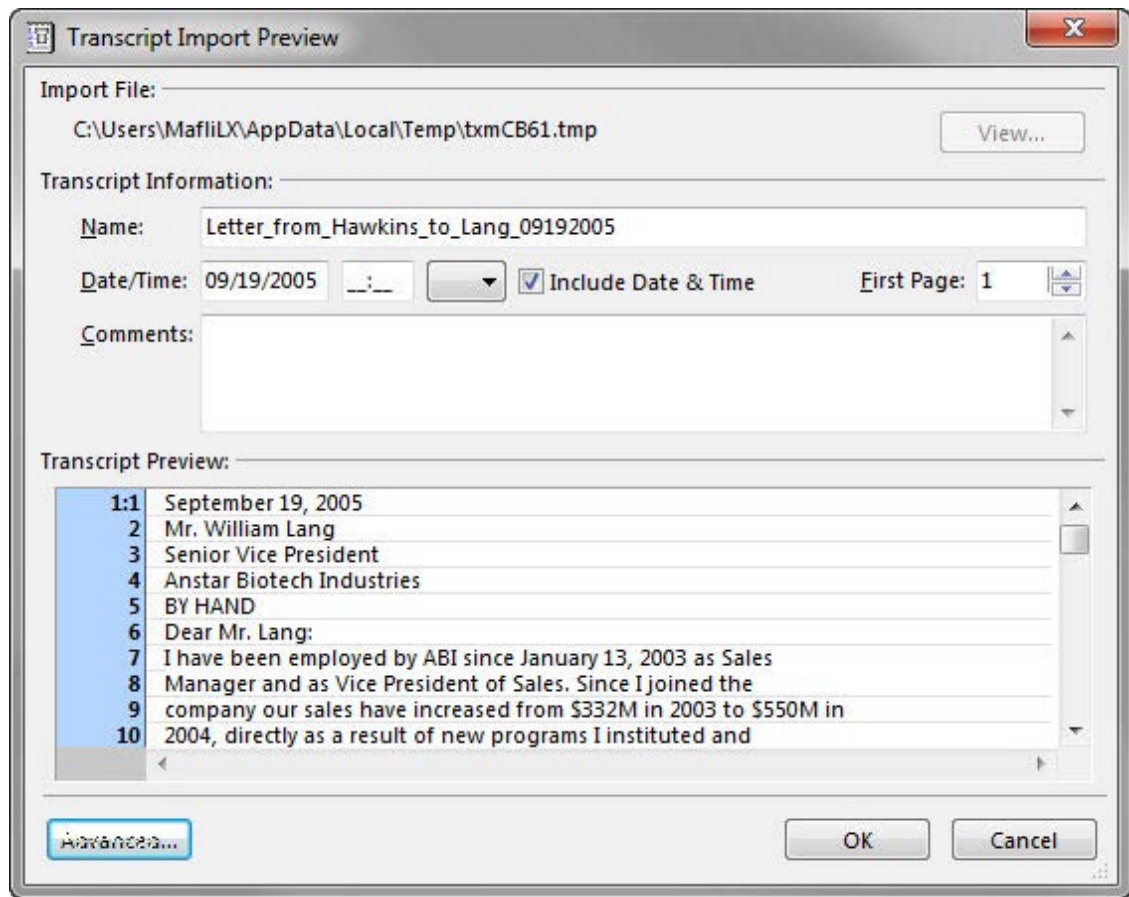


8. Select the **Word Wrap** check box if you want the text to wrap within the dialog box.
9. In the message about file format, click **OK**.

The Transcript Import Preview dialog box opens.

The Name box in this dialog box is filled with the contents of the Name box on the Import from Clipboard dialog box. The Date/Time field is also automatically filled in.

10. In the first **Date/Time** box, notice that the date is automatically filled in for you.



11. In the second **Date/Time** box, type in the time, then select **AM** or **PM** from the list if that information is applicable.

Notice that the Include Date & Time box is selected by default. Clear this check box if you do not want the date/time to display in the Transcripts pane along with the transcript name.

12. In the **Comments** box, type in any relevant information about the file content.
13. In the **Transcript Preview** box, scroll to verify that the file content displays properly.
14. Click **OK** when you are finished.
15. In the **Transcripts pane**, verify that the letter now displays with case transcripts.

The file's content displays in the Transcript window and displays by line and page number like transcripts do.

Related Topics

[About importing data](#)
[Importing transcripts](#)

Updating or appending transcripts

You have the option of either updating or appending an existing transcript. The steps for performing either option are nearly identical:

- If you update an existing transcript, TextMap updates the existing transcript and creates a backup of the original transcript with a draft that is appended to the original transcript name.
- If you append an existing transcript, TextMap appends the existing transcript and creates a backup of the original transcript renamed with "[Draft]" appended to the name. The original draft transcript will retain the original transcript ID.

The backup and the updated/appended copy will both display in the Transcripts pane. You can later delete the backup draft by selecting it in the Transcript pane and then clicking Delete Transcript on the Transcript menu.

To learn about updating rough transcripts

If a rough copy of a transcript was already imported into the case, you can easily update it with the final transcript. TextMap creates a backup copy of the transcript when updating it. The name of the transcript will be the same, but with [DRAFT] appended.

Any annotations applied to the rough copy will be transferred to the final transcript. If TextMap cannot locate the exact transcript location for an annotation, it will label it as an orphaned annotation. Orphans occur when the annotation text or the text surrounding the annotation has changed significantly. This change can be actual, textual change or a large change in formatting. TextMap moves orphaned annotations to the top of the transcript (Page 1, Line 1). The note section includes the original page and line number of the annotation to help you place the annotation manually. Move annotations by using the Move Annotation option on the Annotation menu.

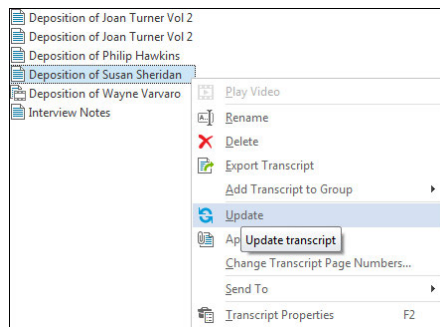
Any redactions applied to the rough copy will be transferred to the final transcript. TextMap cannot apply redactions to the final transcript if there are spelling errors, or if there is information removed from the transcript text.

In the event that you have multiple rough transcript files that are all part of the same transcript, TextMap also offers the option to combine these files into a single transcript by appending the later testimony to an existing transcript. In this instance, choose the Append to Transcript option from the right-click menu.

-  If you are updating/appending a transcript that is assigned to one or more transcript groups, the updated and DRAFT transcripts will both display within the transcript group(s). If the rough transcript is assigned to a group that no longer exists, then the rough and final transcripts will display in the Transcript List under Unassigned. See [Creating transcript groups](#).

To update or append an existing transcript

1. In the **Transcripts** pane, right-click on the transcript you want to append.



2. On the submenu, click one of the following:

To update a transcript

- a. Click **Update**.
- b. In the **Select Updated Transcript File** dialog box, navigate to and select the updated transcript, and then click **Select**.
- c. In the message box to continue, click **Yes**.
- d. In the **Transcript Import Preview** box, confirm the name of the transcript, and click **OK** to continue.
- e. In the message box for backups, click **OK**.
- f. Click **OK** on the subsequent message box(es) to complete the transcript update process.

The updated transcript displays in the Transcript pane, identified by the word [DRAFT] appended at the end of the name.

TRANSCRIPTS <

Arrange By: Transcript Date Oldest on top ^

Group : Witnesses

10/21/2000 10:00 AM Deposition of Philip Hawkins

Group : (Unassigned)

No Date Interview Notes

5/23/2003 12:00 AM Deposition of Wayne Varvaro

5/23/2003 11:47 AM Deposition of Susan Sheridan [DRAFT]

5/24/2003 11:14 AM Deposition of Joan Turner Vol 2

TRANSCRIPTS

EXHIBITS & VIDEO

ANNOTATION DETAIL

To append to a transcript

- Click **Append to**.
- In **Select Transcript File to Append** dialog box, navigate to and select the updated transcript, and then click **Select**.
- In the **Transcript Import Preview** dialog box, modify any transcript information if needed, such as the date and time, and then click **OK**.

Transcript Import Preview

Import File: C:\Users\tillerr\AppData\Local\Temp\bxf094.txt View...

Transcript Information:

Name: Deposition of Philip Hawkins

Date/Time: 12/10/2000 Include Date & Time First Page: 1

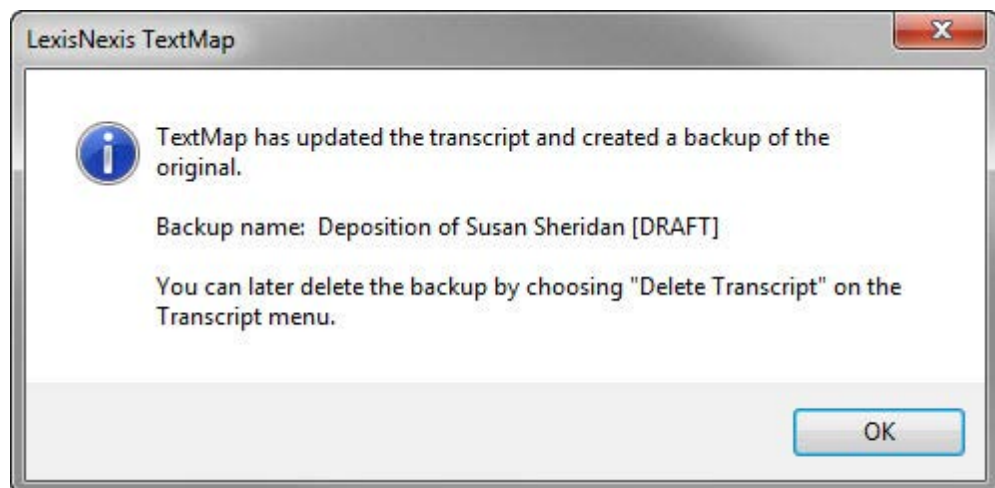
Comments:

Transcript Preview:

1:1	STATE OF FLORIDA
2	DEPARTMENT OF LABOR AND EMPLOYMENT SECURITY
3	OFFICE OF THE JUDGE OF COMPENSATION CLAIMS
4	DISTRICT "C"
5	CLAIM NO: 263-55-6571
6	EMPLOYEE: PHILIP M. HAWKINS
7	EMPLOYER: ABI
8	

Advanced... OK Cancel

- d. In the transcript message, click **OK**.



The original transcript now displays in the Transcript List with [DRAFT] appended to the name. The updated or appended transcript also displays.

Related Topics

[Importing transcripts](#)
[About CaseViewNet](#)

Batch importing cases

The Batch Import Cases Wizard assists you in importing Portable Case Format (.pcf) files into a TextMap case. TextMap will create a new case for each of the files included. TextMap saves each case to the same folder as the original .pcf file and uses the .pcf file name for each new TextMap case created.

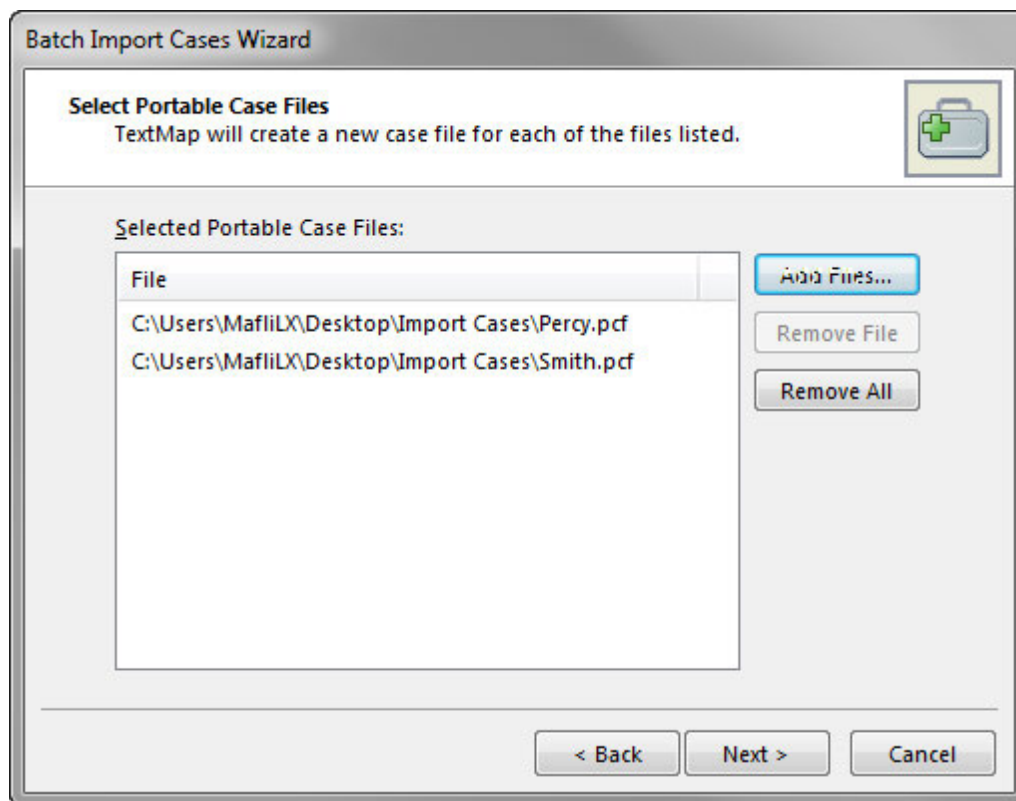
You have the option to skip building the word indices to reduce processing time. You may want to choose this option when importing large cases. TextMap can build the word indices anytime after the cases are created.

To bulk import cases

1. On the **File** menu, click **Batch Import Cases**.
2. In the message box to close the case, click **OK**.

The Batch Import Cases Wizard launches.

3. On the **Welcome** page, click **Next**.
4. On the **Select Portable Case Files** page, click **Add Files**.

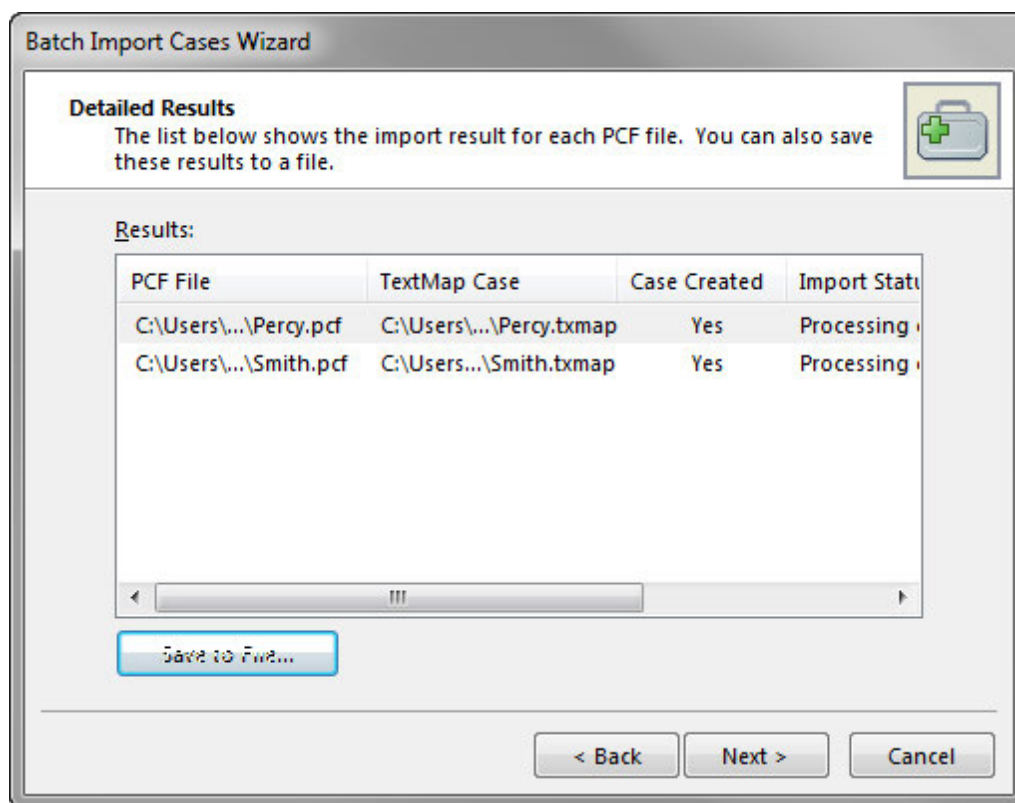


 If you want to import more than one file at a time, press the CTRL key while selecting the files you want to import.

5. In the **Select one or more cases to import** dialog box, navigate to the folder where the .pcf file is saved.
6. Select the file you want to import and then click **Open**.

To remove a file from the import, select it in the Selected Portable Case Files box and click Remove File.

To remove all files from the import, click Remove All.
7. Click **Next** to continue.
8. In the **Word Index Options** dialog box, choose whether to build a word index for each case, then click **Next**.
 - Yes, I want to build the new word index.
 - No, I do not want to build the word index.
9. In the **Cases to Create** dialog box, review the file location of the case files, then click **Next**.
10. In the **Ready to Create Cases** dialog box, review the number of cases you are bulk importing, then click **Next**.
11. In the **Import Complete** dialog box, review the number of cases successfully imported.
12. Select the **View detailed result** check box to view more details about the import, then click **Next**.
13. In the **Detailed Results** dialog box, scroll to view each case's details.



14. Click the **Save to File** button to save this information to a .csv file.

15. In the **Completing the Batch Import Cases Wizard**, click **Finish**.

You can now open the cases in TextMap.

Related Topics

[About importing data](#)

[Importing transcripts](#)

[Importing exhibit packages](#)

Using CaseViewNet Realtime

About CaseViewNet

CaseViewNet® is a free transcript viewer made by Stenograph, LLC, and it is automatically installed when you install TextMap.

CaseViewNet provides interactive real-time access to testimony through a court reporter's private WiFi network or a wired connection. CaseViewNet updates all edits during a session.

CaseViewNet and TextMap integrate so that you can instantly import a transcript into TextMap during a deposition and start annotating and issue linking. You can even start CaseViewNet by clicking on TextMap's toolbar. When you're ready to import the transcript to TextMap just click the Send to TextMap button.

CaseViewNet software is free. There are no tokens to purchase, no royalties to pay, and no compliance issues to worry about. You are free to concentrate on the important testimonial matters at hand.

For more information about CaseViewNet, click [here](#). [Customer Support](#) for CaseViewNet is provided by Stenograph. For TextMap-related questions, call CaseMap Customer Support.

[Learn what you can do with CaseViewNet](#)

CaseViewNet is intuitive and easy to learn. It has its own Help system and customer support through Stenograph.

Here is a list of what you can expect to do using CaseViewNet:

- Mark testimony for quick and easy review.
- Search testimony for a question, answer, word, phrase, marked lines, time or notes.
- Use Quick Find to locate questions, answers, marked lines and notes.
- Write on-screen notes linked to specific testimony.
- Use Quick Issues commands to identify specific testimony for on-screen review.
- Locate time-specific testimony segments.
- Generate printed reports of annotated text for printing and save information to file.
- Save the realtime transcript as a CaseViewNet, LiveNote, ASCII text, Summation text, Amicus text or TextMap portable transcript file.
- Instantly export the transcript to a TextMap case by clicking Send to CaseMap button.

[Find a CaseViewNet court reporter](#)

CaseViewNet client viewer accepts serial input from any court reporter capable of sending realtime to viewers such as CaseView® II, LiveNote®, Summation®, and others. It uses the same serial cables, splitters, and adapters traditionally used for realtime court reporting.

Case CATalyst users with a CaseViewNet certificate can distribute realtime to CaseViewNet wirelessly. Client computers will receive the entire transcript, even if they arrive late. CaseViewNet's RapidRefresh™ instantly updates all edits, including globals, on clients' computers so your realtime looks better. This process allows you to eliminate cables, splitters, adapters, and the time it takes to connect them.

Ask the reporters you normally use if they can provide realtime service using CaseViewNet. Reporters who have Stenograph's Case CATalyst reporting software can add CaseViewNet capability as an optional annual license.

You can find court reporters who are licensed to provide CaseViewNet realtime output via network connection allowing for wired/wireless connection and instant refreshing of the transcript. Search the Stenograph licensed CaseViewNet [reporter directory](#).

[Get a free download of CaseViewNet](#)

CaseViewNet automatically launches when you click on the Realtime toolbar button. If

TextMap can't find CaseViewNet a message displays with a link to the Stenograph website for information about CaseViewNet and a free download.

Related Topics

[Sending a transcript to TextMap](#)

[Updating or appending transcripts](#)

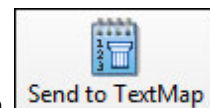
Sending a transcript to TextMap

Sending a transcript from CaseViewNet to TextMap is easy. If you are importing a rough transcript using CaseViewNet, you can begin annotating the transcript as soon as the import is complete. Later, you can update the rough or draft transcript with the final transcript. TextMap creates a backup copy of the transcript when updating it. The name of the transcript will be the same, but with [DRAFT] appended to it. Any annotations applied to the rough copy will be transferred to the final transcript. See [Updating or appending transcripts](#).

You can send a transcript two ways:

- On the **File** menu in **CaseViewNet**, click **Send to TextMap**.

- On the **CaseViewNet** toolbar, click the **Send to TextMap** button



Related Topics

[About CaseViewNet](#)

[Updating or appending transcripts](#)

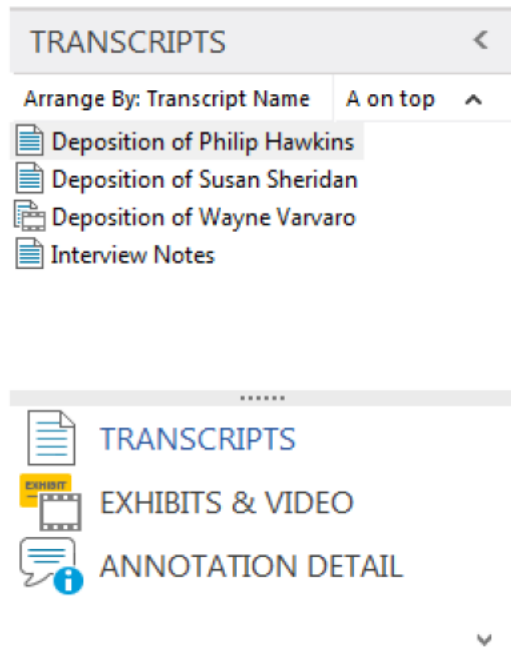
Working with Transcripts

About transcripts

Once transcripts are imported into a case, you can organize, sort, and edit them to prepare for transcript review. When a transcript is imported or added to TextMap, it is displayed alphabetically (by name) in the Transcripts pane and can be sorted accordingly. Transcripts can also be sorted by the transcript or import date/time.

After a transcript has been imported to TextMap:

- it can remain as unassigned or placed in a group with other transcripts for better search capabilities
- a new starting page number can be specified (page numbering can be changed).



💡 If the transcript group(s) do not display in the Transcripts pane, right-click on the Arrange By heading in the Transcripts pane and select Show Groups.

Related Topics

[Resizing the Transcripts pane](#)
[Changing transcripts fonts](#)
[Editing transcript properties](#)
[Sorting transcripts](#)
[Creating transcript groups](#)
[Renaming transcripts](#)
[Deleting transcripts](#)
[Sending transcripts to Sanction](#)

Resizing the Transcripts pane

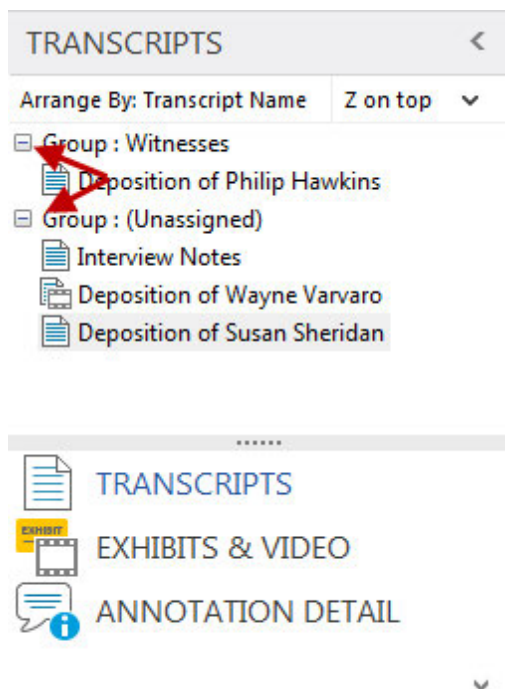
The Transcript pane is located at the top of the Navigation pane when you click on the Transcripts, Exhibits and Video, and Annotation Detail buttons. The Transcript pane contains all transcripts and other documents imported into the TextMap case, and displays a date and time stamp for each. You can easily resize the Transcripts pane for better viewing or hide it from to maximize the TextMap window during transcript review.

You can sort transcripts in alphabetical order by name, and by transcript or import date/time. TextMap saves the sort order last used when you when you reopen the case.

To hide task panes for better viewing

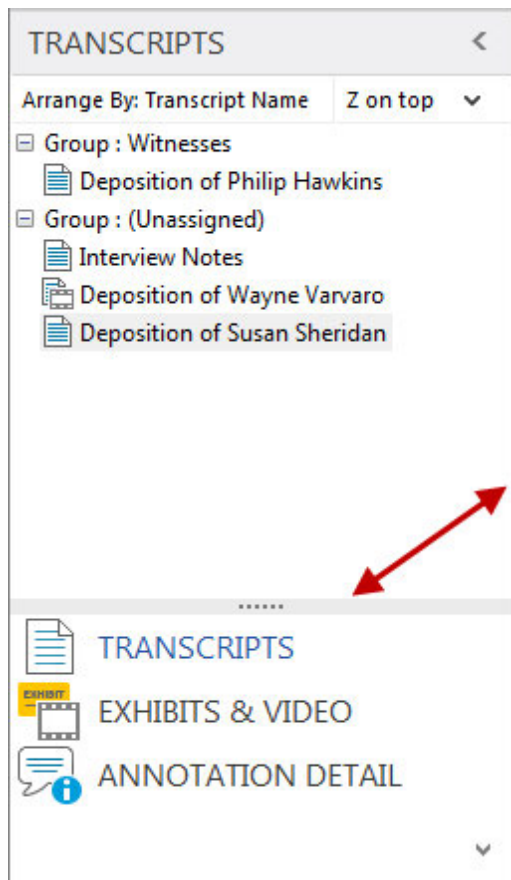
To show/hide the Transcript List, click the Expand ()/Collapse () buttons. For example, if you want to focus on searching transcripts in one group (e.g., Group A), you may want to hide transcripts from other groups (e.g., Unassigned) from view. You can also double-click on the group header (e.g., Unassigned) to expand and/or collapse the area.

 Expanding and collapsing groups is not supported for Windows® XP users.



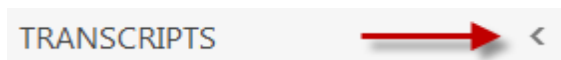
To maximize the Transcript pane for better viewing

To change the height or width of the Transcript pane, drag the split bars to the left or right, or up or down.



 To hide the Transcript pane to maximize transcript display

To maximize a transcript's display in the TextMap window, click on the Collapse button to pin the Navigation pane to the left side of TextMap. The Navigation pane can easily be expanded and locked on-screen when you need to use it more frequently.



 To hide the date and time display

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click the **Transcripts** tab.
3. In the **Transcripts List Options** area, clear the check boxes for **Show transcript date** and **Show transcript time**.
4. Click **OK** to save your changes.

Related Topics

[About transcripts](#)

[Changing transcripts fonts](#)

[Sorting transcripts](#)

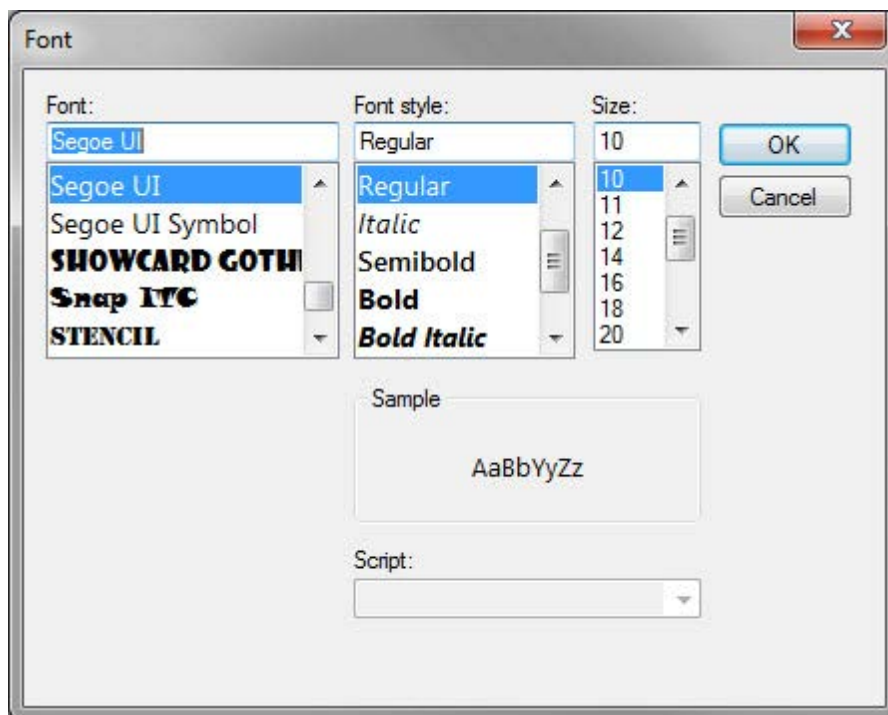
[Creating transcript groups](#)

Changing transcripts fonts

Once transcripts are imported, you can adjust the font size and style for better viewing in the TextMap window. The selected font size and style is applied to all case transcripts.

To change transcript fonts

1. On the View ribbon, click the **Transcript Font** to open the Font dialog box.
2. In the **Font** list, click on the font you want to use.



3. In the **Font style** list, click on the font style you want: **Regular**, **Italic**, **Bold**, **Bold Italic**.
4. In the **Size** list, click on the font size.
5. Review your selections in the **Sample** box.
6. In the **Script** list, click on the font script type, if necessary.

7. Click **OK** to save your changes.

Related Topics

[About transcripts](#)

[Importing transcripts](#)

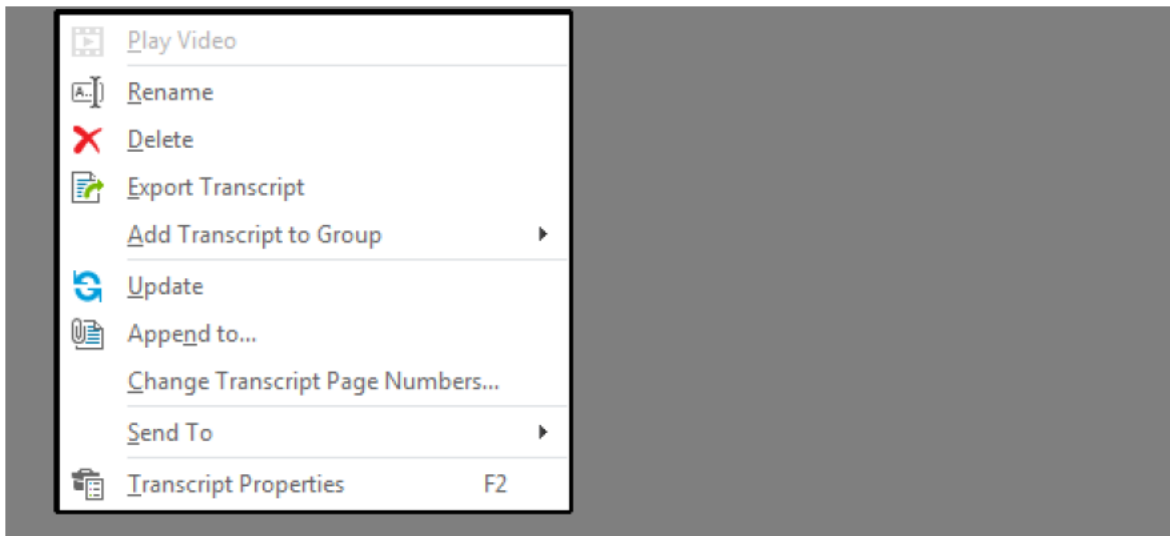
Changing transcript page numbers

If you receive a transcript for which the page numbering is incorrect and do not correct it during the initial import, you can still update the page numbering after the fact. The Change Transcript Page Numbers feature only changes the page numbers and does not change the transcript text or line numbering on each of the pages.

 TextMap automatically updates existing annotations to reflect the new page numbers.

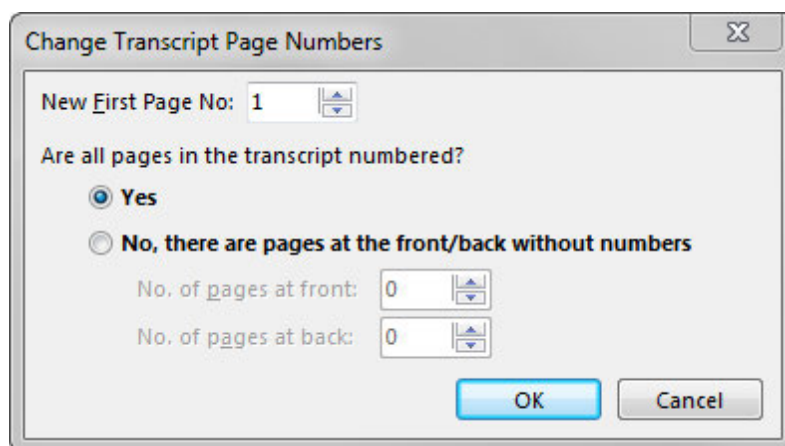
To change a transcript page numbers

1. On the **Transcripts** list, select the transcript where the page numbering will be changed.
2. Right-click on the selected transcript, and then select **Change Transcript Page Numbers**.



 The Change Transcript Page Numbers menu item is disabled if you do not have 'Update Transcript' permission.

3. In the **Change Transcript Page Numbers** dialog box:

A screenshot of a Windows-style dialog box titled "Change Transcript Page Numbers". It has a close button (X) in the top right corner. The dialog contains a "New First Page No:" label followed by a text box containing the number "1" and a small up/down arrow icon. Below this is the question "Are all pages in the transcript numbered?". There are two radio button options: "Yes" (which is selected) and "No, there are pages at the front/back without numbers". Under the "No" option, there are two more text boxes: "No. of pages at front:" containing "0" and "No. of pages at back:" containing "0", each with an up/down arrow icon. At the bottom right are "OK" and "Cancel" buttons.

 To number all pages in the transcript

- a. In the **New First Page No:** box, enter a value (e.g., 1) for the first page of the transcript.
- b. Under the **Are all pages in the transcript numbered?** heading, select **Yes** to number all pages.
- c. Optional: Go to the **To set unnumbered pages** procedure to identify unnumbered pages in the front/back of the transcript, otherwise, proceed to **Step 4**.

 To set unnumbered pages

- a. Under the **Are all pages in the transcript numbered?** heading, select **No, there are pages at the front/back without numbers** to identify the number of pages in the front and/or back of the transcript.
 - b. In the **No. of pages at front:** box, enter the number of pages at the front of the transcript that are not numbered.
 - c. In the **No. of pages at back:** box, enter the number of pages at the back of the transcript that are not numbered.
 - d. Proceed to **Step 4**.
4. In the **Change Transcript Page Numbers** dialog box, click **OK** to make the page numbering change in the transcript.

 Related Topics

[About transcripts](#)

[Importing transcripts](#)

Sorting transcripts

The Transcripts pane allows you to sort transcripts in alphabetical order, by date and time, and name. TextMap saves the sort order last used when you re-open the case.

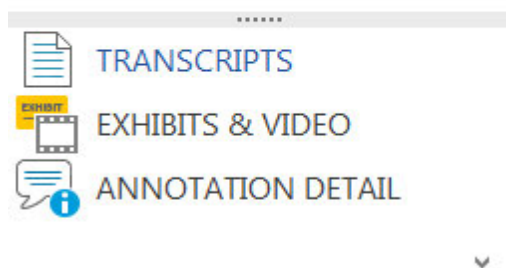
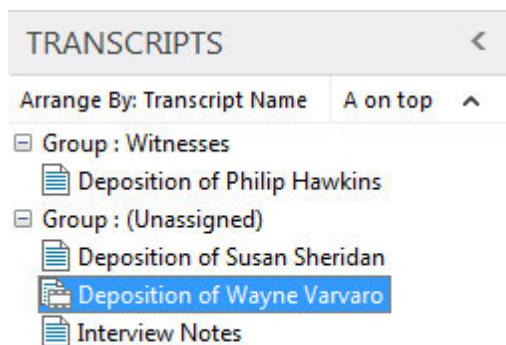
Setting the date/time option is useful when a case contains multiple depositions from the same person. Dates display in brackets to the left of the transcript name in the Transcripts pane. The date and time options are set in the Options dialog box, accessible from the Tools menu. Options are personal to each user's view, and do not affect other users in the same case. If a user changes the date of a transcript, the updated date immediately displays in the list.

When changing from a name sort to a date sort, and vice versa, the Transcripts pane automatically sorts in ascending order from A to Z.

To sort transcripts in alphabetical order

1. In the **Transcripts** pane, click on the **A on top** button to sort transcripts alphabetically in descending order from A to Z.

You can also click on the View ribbon, and then on the Arrange By tab, click Transcript Name.



2. Click on the button again to resort transcripts in ascending order from A to Z.

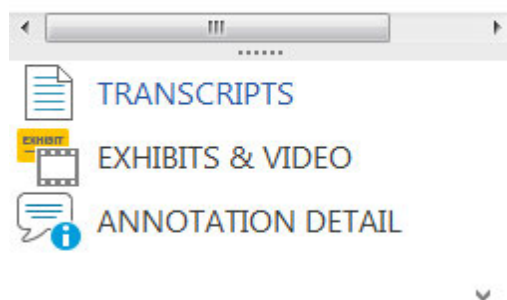
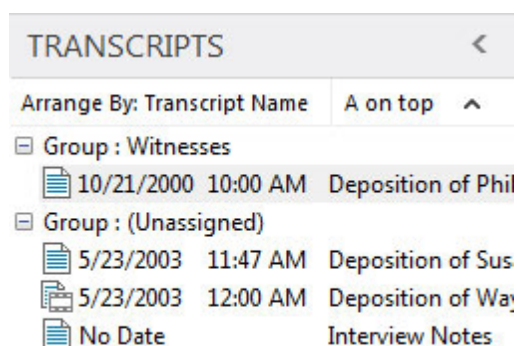
- On the shortcut menu, click **Transcript Name**.

 To sort transcripts by date and time

- On the **File** menu, click **Options**.
- In the **Options** dialog box, click the **Transcripts** tab.
- Select the check boxes for **Show transcript date** or **Show transcript time**.

You cannot select the Show transcript time check box without also selecting the Show Transcript date check box.

- Click **OK** to close the **Options** dialog box.
- In the **Transcripts** pane, notice that the date and/or time for each transcript now displays.



Transcripts or interview notes without a date sort to the bottom and display No Date in the Arrange By: column.

Transcripts will sort by date even if you choose not to display the date and time in the Transcripts pane.

- Right-click on the **Arrange By:** column header and click **Transcript Date** or **Import Date**.

Transcripts sorted by date can then be sorted from oldest to newest.

7. You can also click the **Oldest on top** button to sort transcripts from oldest to newest by date and/or time.

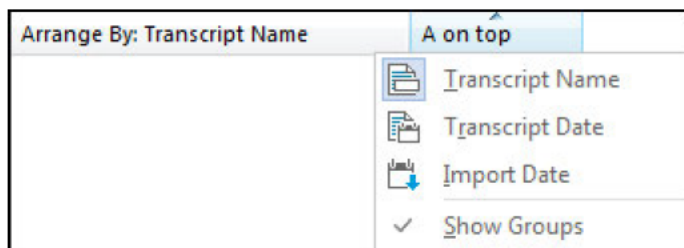
To resort the list, click the **Newest on top** button.

To remove the date and time from the Transcripts pane, click Options on the Tools menu and clear the check boxes for showing the transcript date or time on the Transcript tab.

To sort transcripts by group

1. In the **Transcripts** pane, click the **Arrange By:** column header to choose how you want to sort transcripts.

You can also click on the View ribbon and then select the Show Groups check box.



2. On the shortcut menu, click **Show Groups**.

Related Topics

[About transcripts](#)

[Importing transcripts](#)

[Creating transcript groups](#)

Filtering transcripts

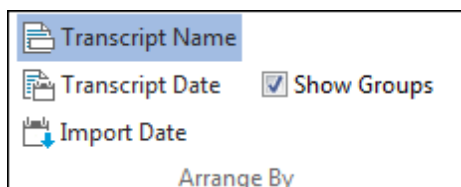
Filtering transcripts allows you to quickly locate a transcript and load it for display.

-  A minimum of 30 transcripts must be imported into the case before the Filter Transcripts by Name box displays in the Transcripts pane.

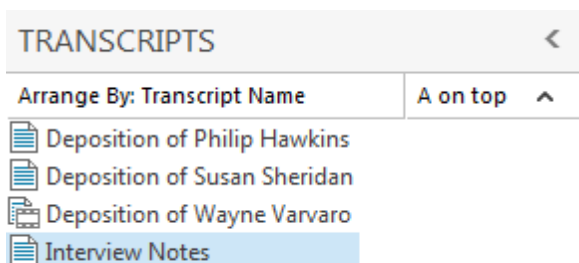
TextMap will automatically save any transcript filter you have. If you close a case, TextMap will display transcripts with the last filter applied.

To filter transcripts by name

1. On the **Arrange By** menu of the **View** ribbon, click **Transcript Name** to sort accordingly all Transcript by name.



The Transcripts pane now displays the transcripts sorted based on the filter.



The transcript now displays in the Transcript window, and any annotations now display in the Annotations pane.

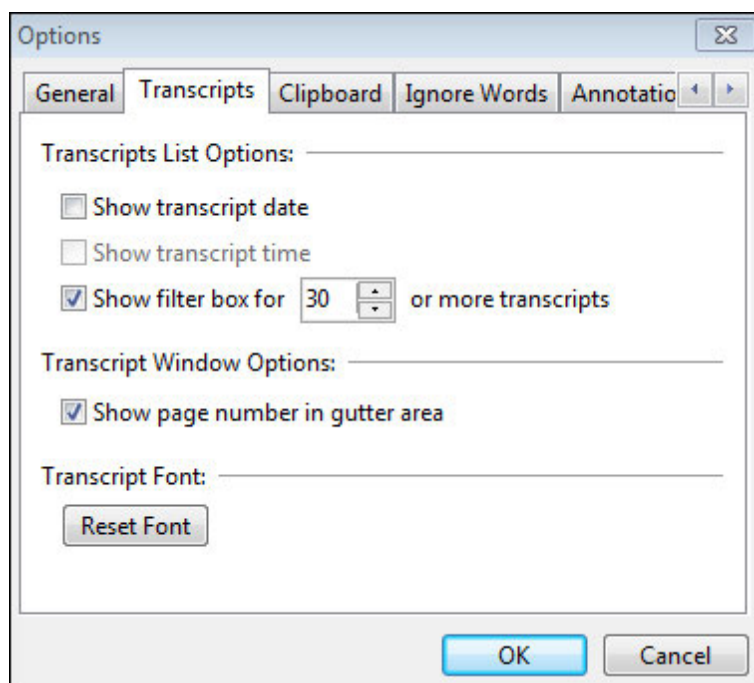
To clear the transcript filter

You can clear the transcript filter four ways:

- Click the Clear button  next to the Filter Transcripts by Name box.
- Select text in the Filter Transcript by Name box and then press the Delete key.
- On the View menu, click Show All Transcripts.
- Press the Esc key.

To modify or disable the transcript filter setting

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click on the **Transcripts** tab.



3. In the **Transcripts List Options** area, click the up/down arrows in the number list to set it to the minimum number of transcripts you want in a case before the Filter Transcripts by Name box displays.

The default setting is for the filter box to display after 30 transcripts are imported into a case. You can adjust this setting by depending on the number of case transcripts in your case.

4. Clear the **Show filter box for 30 or more transcripts** if you want to disable the Filter Transcripts by Name box from displaying in the Transcripts pane.
5. Click **OK** to save your settings.

Related Topics

[About filtering](#)

[Sorting transcripts](#)

Updating or appending transcripts

You have the option of either updating or appending an existing transcript. The steps for performing either option are nearly identical:

- If you update an existing transcript, TextMap updates the existing transcript and creates a backup of the original transcript with a draft that is appended to the original transcript name.

- If you append an existing transcript, TextMap appends the existing transcript and creates a backup of the original transcript renamed with "[Draft]" appended to the name. The original draft transcript will retain the original transcript ID.

The backup and the updated/appended copy will both display in the Transcripts pane. You can later delete the backup draft by selecting it in the Transcript pane and then clicking Delete Transcript on the Transcript menu.

To learn about updating rough transcripts

If a rough copy of a transcript was already imported into the case, you can easily update it with the final transcript. TextMap creates a backup copy of the transcript when updating it. The name of the transcript will be the same, but with [DRAFT] appended.

Any annotations applied to the rough copy will be transferred to the final transcript. If TextMap cannot locate the exact transcript location for an annotation, it will label it as an orphaned annotation. Orphans occur when the annotation text or the text surrounding the annotation has changed significantly. This change can be actual, textual change or a large change in formatting. TextMap moves orphaned annotations to the top of the transcript (Page 1, Line 1). The note section includes the original page and line number of the annotation to help you place the annotation manually. Move annotations by using the Move Annotation option on the Annotation menu.

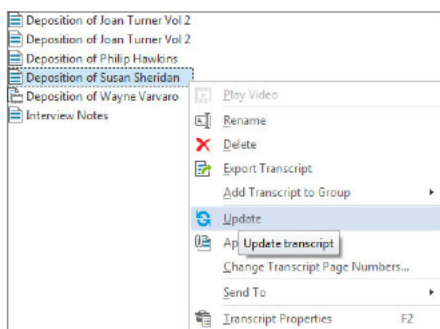
Any redactions applied to the rough copy will be transferred to the final transcript. TextMap cannot apply redactions to the final transcript if there are spelling errors, or if there is information removed from the transcript text.

In the event that you have multiple rough transcript files that are all part of the same transcript, TextMap also offers the option to combine these files into a single transcript by appending the later testimony to an existing transcript. In this instance, choose the Append to Transcript option from the right-click menu.

-  If you are updating/appending a transcript that is assigned to one or more transcript groups, the updated and DRAFT transcripts will both display within the transcript group(s). If the rough transcript is assigned to a group that no longer exists, then the rough and final transcripts will display in the Transcript List under Unassigned. See [Creating transcript groups](#).

To update or append an existing transcript

1. In the **Transcripts** pane, right-click on the transcript you want to append.

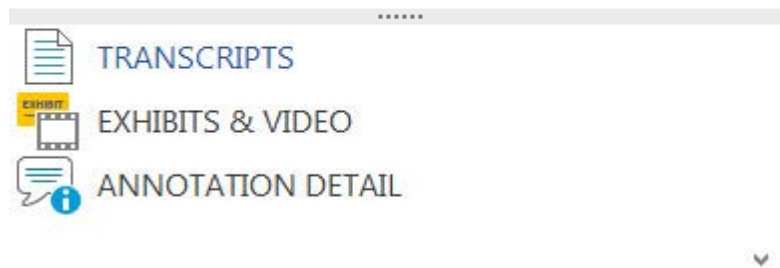
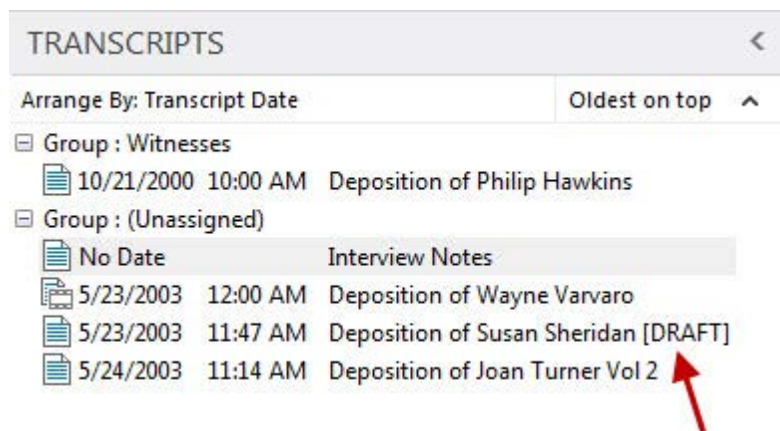


2. On the submenu, click one of the following:

To update a transcript

- a. Click **Update**.
- b. In the **Select Updated Transcript File** dialog box, navigate to and select the updated transcript, and then click **Select**.
- c. In the message box to continue, click **Yes**.
- d. In the **Transcript Import Preview** box, confirm the name of the transcript, and click **OK** to continue.
- e. In the message box for backups, click **OK**.
- f. Click **OK** on the subsequent message box(es) to complete the transcript update process.

The updated transcript displays in the Transcript pane, identified by the word [DRAFT] appended at the end of the name.



To append to a transcript

- a. Click **Append to**.

- b. In **Select Transcript File to Append** dialog box, navigate to and select the updated transcript, and then click **Select**.
- c. In the **Transcript Import Preview** dialog box, modify any transcript information if needed, such as the date and time, and then click **OK**.

Transcript Import Preview

Import File: C:\Users\tillerr\AppData\Local\Temp\txmF094.txt View...

Transcript Information:

Name: Deposition of Philip Hawkins

Date/Time: 12/10/2000 Include Date & Time First Page: 1

Comments:

Transcript Preview:

1:1	STATE OF FLORIDA
2	DEPARTMENT OF LABOR AND EMPLOYMENT SECURITY
	OFFICE OF THE JUDGE OF COMPENSATION CLAIMS
3	DISTRICT "C"
4	
5	CLAIM NO: 263-55-6571
6	EMPLOYEE: PHILIP M. HAWKINS
7	EMPLOYER: ABI
8	

Advanced... OK Cancel

- d. In the transcript message, click **OK**.

LexisNexis TextMap

i TextMap has updated the transcript and created a backup of the original.

Backup name: Deposition of Susan Sheridan [DRAFT]

You can later delete the backup by choosing "Delete Transcript" on the Transcript menu.

OK

The original transcript now displays in the Transcript List with [DRAFT] appended to the name. The updated or appended transcript also displays.

[Related Topics](#)[Importing transcripts](#)[About CaseViewNet](#)

Creating transcript groups

TextMap can hold hundreds or even thousands of transcripts, depending on the size of your case. TextMap allows you to create transcript groups for sets of transcripts that may be similar in content. Transcript groups make searching easier and enable focused searching.

Each transcript group must have a unique name to identify it. Transcript group names are not case sensitive and can be up to 255 characters with no leading or trailing punctuation. Each transcript group must include at least one transcript.

Once created, you can edit, rename, and/or delete transcripts groups. Although a transcript group can be deleted, the transcript(s) is/are not removed from the case, but instead, no longer grouped. TextMap only supports deleting one transcript group at a time.

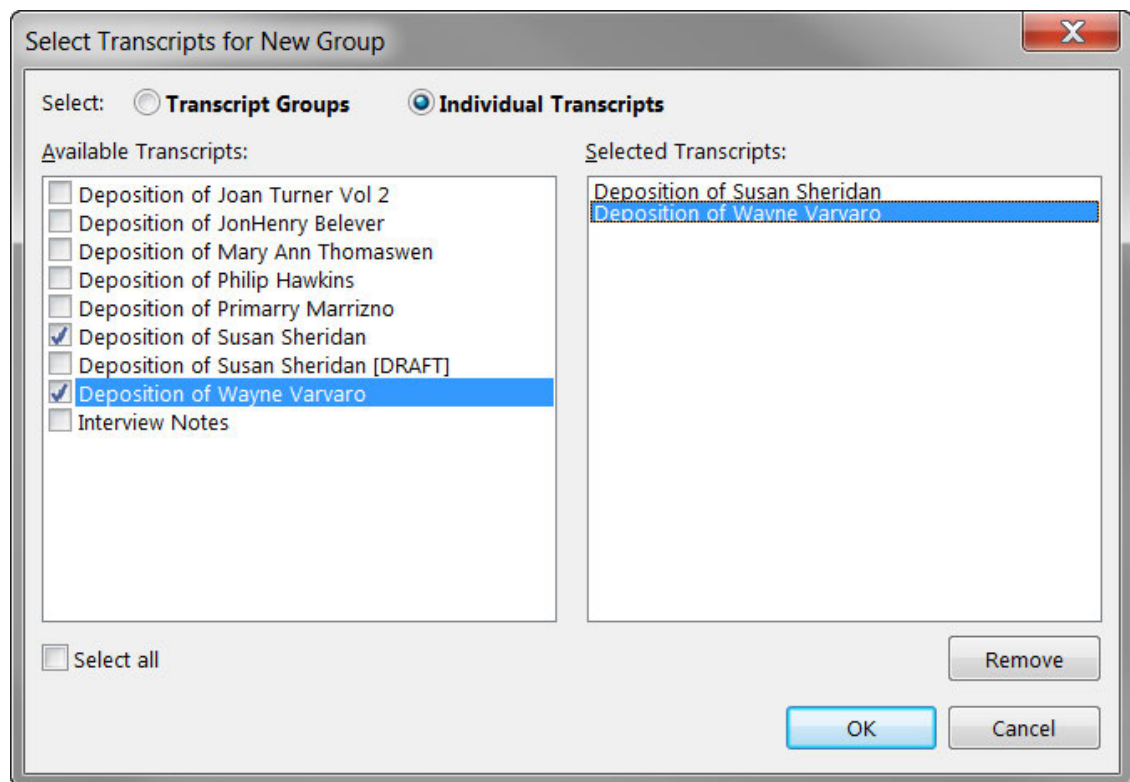
When searches are performed, you can select either transcript groups or specific transcripts to filter (narrow your search), but not both for a single search.

To display groups in the Transcripts pane, click on the Arrange By header and click Show Groups. See [Sorting transcripts](#).

 You can also create transcript groups for reporting if you find yourself repeatedly running the same reports on the same set of transcripts. When you create a transcript group simply name that group with a heading that reflects the report you are printing.

[To create a transcript group](#)

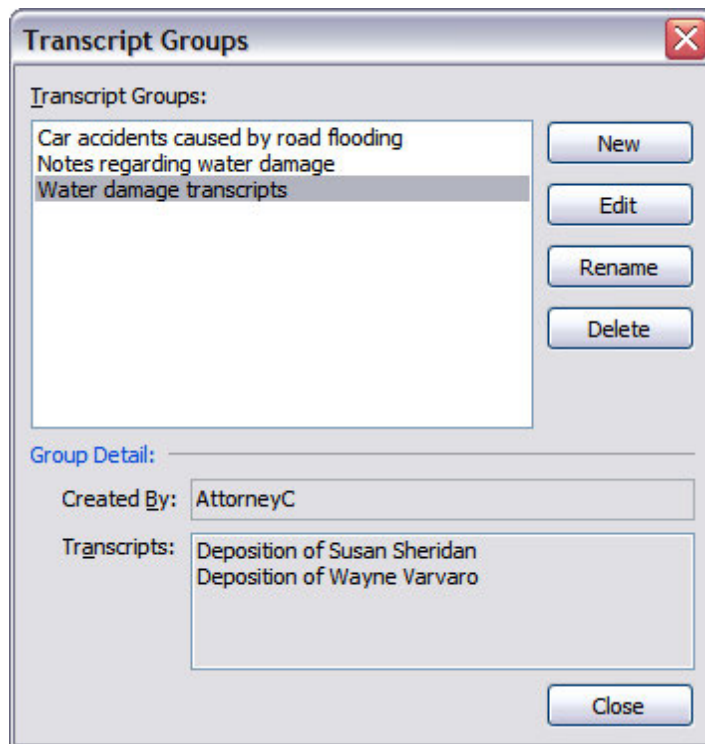
1. On the **Transcripts** ribbon, click **Create & Edit Transcript Groups**.
2. In the **Transcripts Groups** dialog box, click the **New** button.
3. In the **Select Transcripts for New Group** dialog box, select the transcripts in the **Available** box that you want to add to a group.



Transcripts display in alphabetical order.

- Click **Item** or **All** to move the selected transcripts into the **Selected** box.
- Click **OK** to continue.
- In the **New Transcript Group Name** dialog box, type in a meaningful name for the transcript group, then click **OK**.

The new group now displays in the Transcripts Groups box.



The Group Detail area displays the name of the person who created the group and the included transcripts.

7. Click **Close** when you are finished.

To edit a transcript group

1. On the **Transcripts** menu, click **Transcript Groups**.
2. In the **Transcripts Groups** dialog box, select the transcript group you want to edit, then click the **Edit** button.
3. In the **Select Transcripts** dialog box, select the transcripts you want to edit.
 - Select transcripts in the Selected box that you want to remove from the transcript group.
 - Select transcripts in the Available box that you want to add to the transcript group.Click the Item or All buttons to move transcripts between the two boxes.
4. Click **OK** to save your changes.
5. Click **Close** when you are finished.

To add a transcript to a group

If you want to add a transcript to a group directly from the Transcript pane (e.g., Unassigned area):

1. Select/highlight a transcript on the **Transcript** pane.

2. Perform one of the following:

- On the **Transcript** menu, click **Add Transcript to Group**, and then select the group from the submenu list that the transcript will be added to.
- Right-click on a transcript in the **Transcript** pane, click **Add Transcript to Group**, and then select the group from the submenu list that the transcript will be added to.

 There will be no system response if you attempt to add a transcript to a group where it already exists.

The transcript now displays in the new group.

To rename a transcript group

1. On the **Transcripts** menu, click **Transcript Groups**.
2. In the **Transcripts Groups** dialog box, select the transcript to be renamed and click **Rename**.
3. In the **Rename Transcript Group** dialog box, type in the new name, then click **OK**.
4. Click **Close** when you are finished.

To delete a transcript group

1. On the **Transcripts** menu, click **Transcript Groups**.
2. In the **Transcripts Groups** dialog box, select the transcript group you want to delete, then click **Delete**.
3. In the message box to confirm the action, click **Yes**.

The transcript group is now deleted from the case.

4. Click **Close** when you are finished.

Related Topics

[About transcripts](#)
[Importing transcripts](#)
[Sorting transcripts](#)
[About full-text searching](#)

Linking exhibits to transcripts

The Auto Link Exhibit Wizard is used once you have already imported a transcript into TextMap. With this wizard, you can add multiple files, web addresses, or link to another document

management system anywhere in the transcript where the exhibit is mentioned. You can bulk link exhibit files on your computer and web addresses, as well as add custom links to other document management programs. You can even make a document in CaseMap a hyperlinked exhibit in TextMap.

- ✍ To link exhibits or any other files to a single passage in the transcript, use the New Hyperlink Wizard. See [Creating single hyperlinks in transcripts](#).

To link a new exhibit to this case

1. In the **Navigation** pane, click the **Exhibits and Video** button.
2. In the **Exhibit Tasks** pane, click **Link exhibits to this transcript** to open the Auto Link Exhibit Wizard.
3. On the **Auto Link Exhibit Wizard's Welcome** page, click **Next**.
4. On the **New or Existing Exhibit** page, select the option, **Yes, I want to link a new exhibit to this case**, and then click **Next**.
5. On the Document Type page, select the type of document you want to link, and then click **Next**:

To add Files:

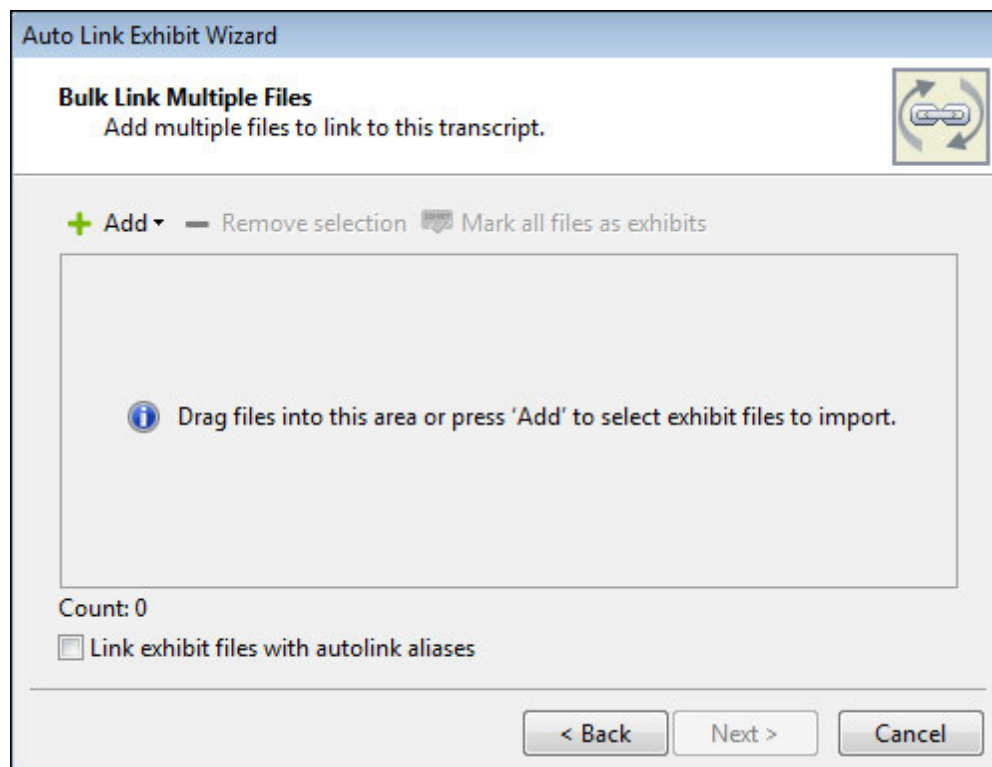
To add Files, do the following:

1. On the **Bulk Link Multiple Files** page, click the **Add** drop down arrow and then click **Add Files**.
2. Navigate to the folder location where the files are saved.
3. In the **Select One or More Exhibits** dialog box, select the file(s), and then click **Open**.

To Add URLs, do the following:

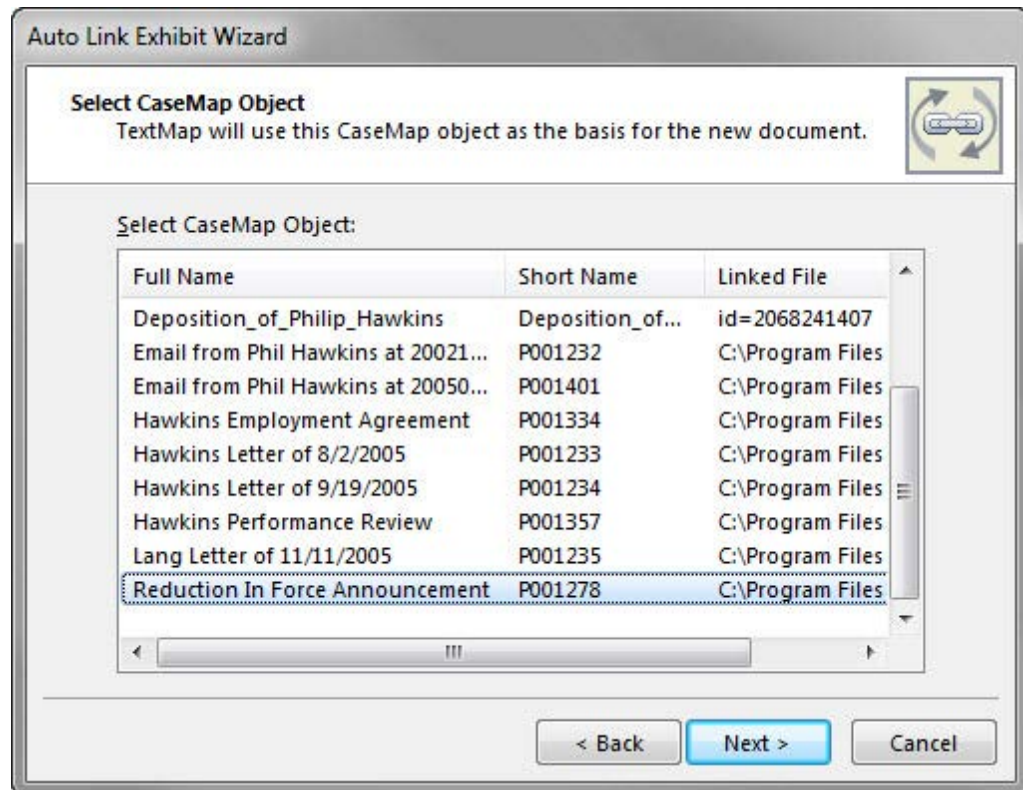
1. On the **Bulk Link Multiple Files** page, click the **Add** arrow and then click **Add URLs**.
2. Enter the address of the web page for the new exhibit and then click **OK**.

To add files via the drag-and-drop operation, drag your selected files into the specified area on the **Bulk Link Multiple Files** page.



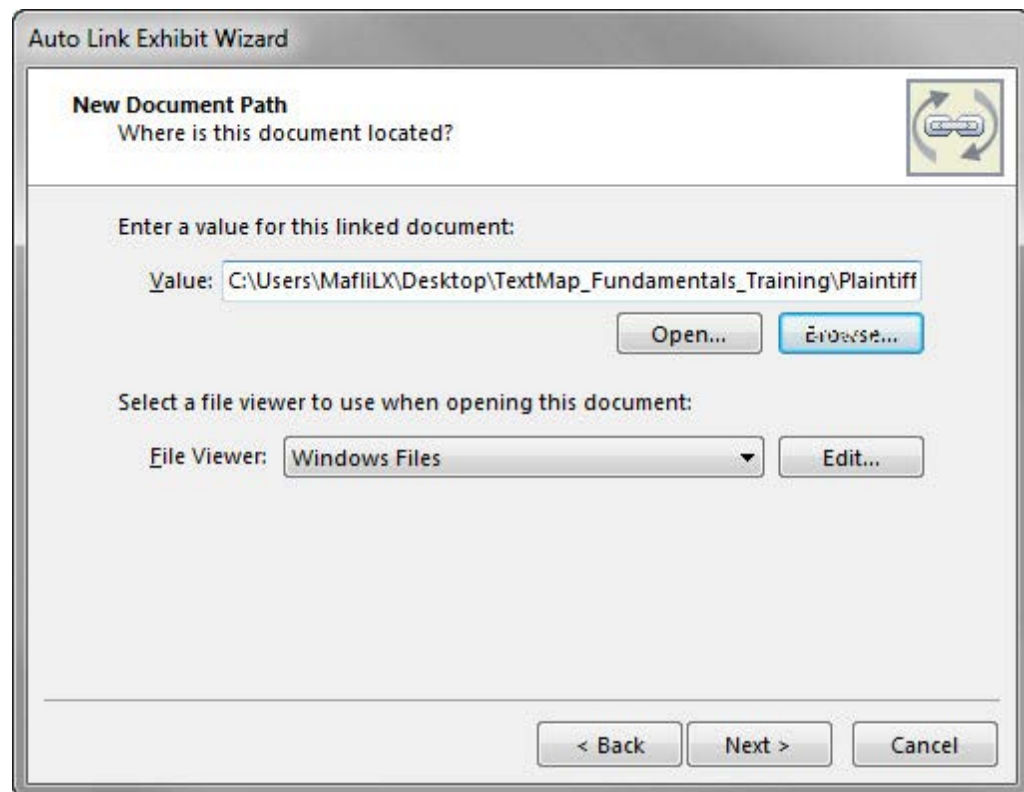
 To add a document linked in CaseMap:

1. On the **Connect to CaseMap** page, launch CaseMap and open the corresponding case (if you have not already done so), and then click **Next**.
2. On the **Select CaseMap Object** page, select the file(s) you want to link, and then click **Next**.



To add a custom link:

1. On the **New Exhibit Path** page, click **Open** or **Browse** to navigate to the folder location where the file is saved, and then click **Open**.



2. In the **File Viewer** list, click the type of viewer you need for the file, and then click **Next**.

3. On the **New Exhibit Name** page, type or edit the file name.

The contents of the Name box is automatically filled with the file name of the linked file. TextMap searches the transcript for the name and creates a hyperlink to the file at each location.

4. For the question, **Is this document an exhibit?**, click **Yes** or **No**.

If the document is not an exhibit it will display in the Exhibits pane under Other Linked Documents.

5. On the **Found References to Document** page, review the number of references found in the transcript.

If there are no references found, on the No References to Document Found page, type in a word or phrase to link to this document, then click **Next**. TextMap automatically creates links in the transcript where all instances of the word or phrase is located in the transcript.

6. Determine whether you want to add more words or phrases and select on one of the following:
 - Yes, I want to add more words or phrases to auto link.
 1. On the **Enter Words or Phrases to Auto Link** page, type in a word or phrase to auto link, and then click **Add**.

2. In the message box, click **OK**.
 3. Continue adding words or phrases until finished.
 - No, I do not want to add more words or phrases to auto link.
- Skip to **Step 7**.

By default, all files will be marked as exhibits. To change, click  **Mark all files as exhibits**.

 If the Exhibit name or Autolink ID need to be modified, click the **Exhibit Name** or **Autolink ID** fields to modify. The Autolink ID will update based on the exhibit name.

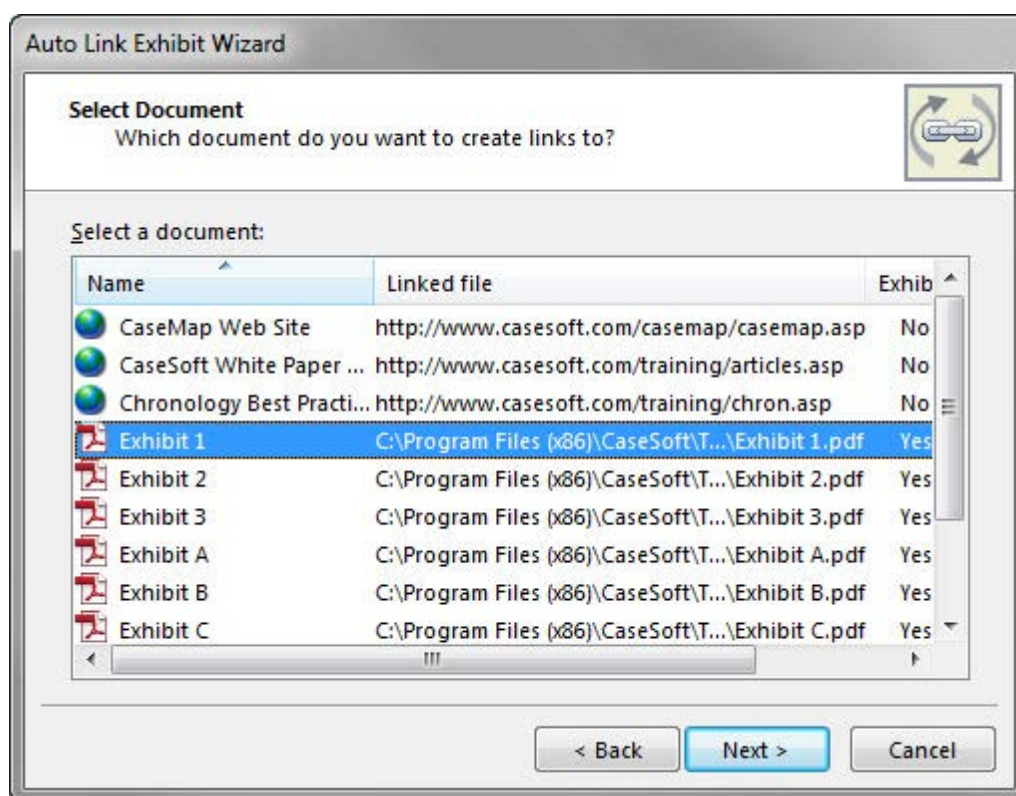
 Exhibit names and Autolink IDs must be unique and cannot be duplicated.

 If the **Link exhibit files with autolink aliases** check box is selected, the hyperlink will be created by pairing the [Autolink alias](#) with the Autolink ID. If the box is not selected, and there are no Autolink alias names defined, the hyperlink will be created from the Exhibit name.

6. Click **Next**.
7. On the **Completing the Auto Link Exhibit Wizard** page, click **Finish**.

☐ **To link an existing linked document to this case**

1. In the **Navigation** pane, click the **Exhibits and Video** button.
2. In the **Exhibit Tasks** pane, click **Link exhibits to this transcript** to open the Auto Link Exhibit Wizard.
3. On the **Auto Link Exhibit Wizard's Welcome** page, and then click **Next**.
4. On the **New or Existing Exhibit** page, select the option, **No, I want to link to an existing linked exhibit**, and then click **Next**.
5. On the **Select Exhibit** page, select the file for which you want to link, and then click **Next**.



6. On the **Completing the Auto Link Exhibit Wizard** page, click **Finish**.

When you click **Finish**, TextMap will open the **Exhibit Properties** dialog for the selected exhibit.

7. In the **Exhibit Properties** dialog box, enter a word or phrase to autolink to this document, and then click **Add**.

TextMap automatically creates links in the transcript where all instances of the word or phrase is located in the transcript.

8. Continue adding words or phrases until finished, and then click **OK**.

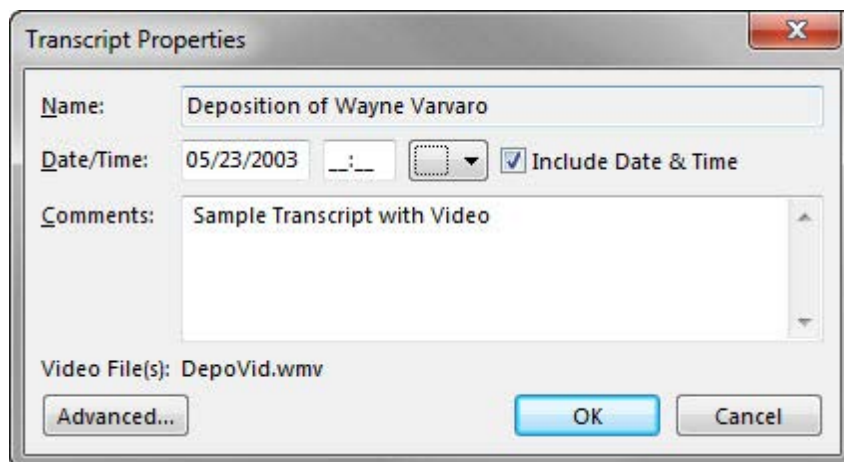
[Related Topics](#)[About exhibits](#)[Using TextMap Exhibit Linker](#)[Importing exhibit packages](#)[Creating single hyperlinks in transcripts](#)[Viewing exhibits](#)

Editing transcript properties

Once transcripts are imported you can view or edit transcript properties for the date/time, comments, video files, and the transcript ID and signature.

To view or edit transcript properties

1. On the **View** ribbon, click **Transcript Properties** to open the Transcript Properties dialog box.
2. In the **Date** box, notice that the date is automatically filled in for you.



You can modify this date as needed.

3. In the **Time** box, type in the time, then select **AM** or **PM** from the list.

Notice that the Include Date & Time box is selected by default. Clear this check box if you do not want the date/time to display in the Transcripts pane along with the transcript name.

4. In the **Comments** box, type in any relevant information about the transcript.
5. Click **Advanced** button if you want to view or modify the transcript ID and signature.
6. Click **OK** to save your changes.

Related Topics[About transcripts](#)[Importing transcripts](#)

Renaming transcripts

Edits to a transcript name can be made quite easily.

To rename a transcript

1. In the **Transcripts** pane, click on the transcript you want to rename.
2. On the **Transcript** menu, click **Rename Transcript**.

You can also right-click on the transcript and then click Rename Transcript.

3. In the **Rename** dialog box, type or edit the transcript name.
4. Click **OK** to save any changes.

Related Topics[About transcripts](#)[Sorting transcripts](#)[Deleting transcripts](#)

Deleting transcripts

Once a transcripts is deleted it is permanently removed from the case. TextMap only supports deleting one transcript at a time.

To delete transcripts

1. In the **Transcripts** pane, click on the transcript you want to delete.
2. On the **Transcript** menu, click **Delete Transcript**.

You can also right-click on the transcript and then click Delete Transcript.

3. In the message to confirm this action, click **Yes**.

Related Topics

[About transcripts](#)

[Sorting transcripts](#)

[Creating transcript groups](#)

[Renaming transcripts](#)

Sending transcripts to Sanction

To assist in organizing presentations of key evidence for trial, you can connect to a case in Sanction® 3.5 and send information from TextMap to Sanction. Please refer to the [Sanction Answer Center](#) for additional information.

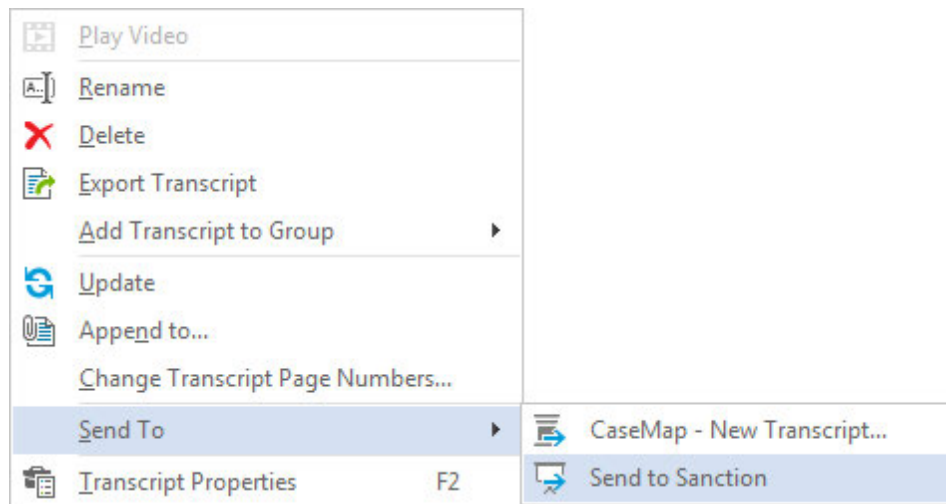
To send a transcript to Sanction

1. Open a case in **Sanction 3.5** or later.

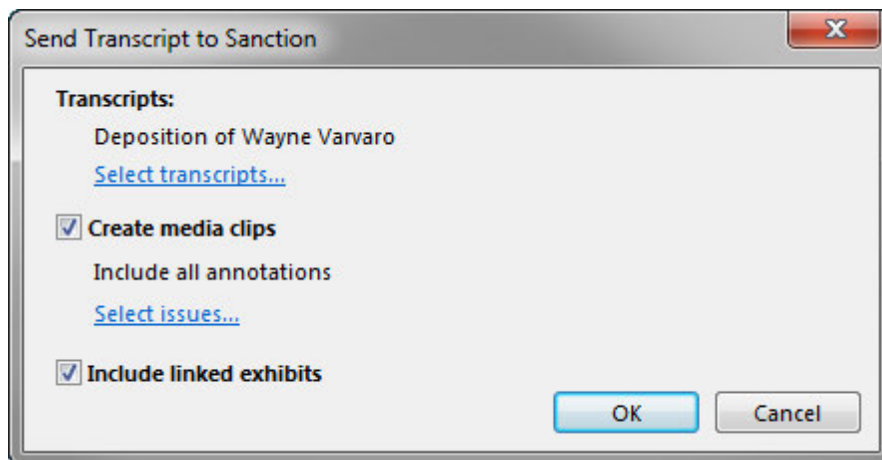
 It is necessary to have a case open in Sanction for the Send Transcript to Sanction option to be successful.

2. In the **Transcript** pane, select/highlight the transcript you want to send to Sanction.
3. On the **Transcript** menu, click the **Send To Sanction** button.

You can also right-click on a transcript in the list, click Send To, and then click Send to Sanction.



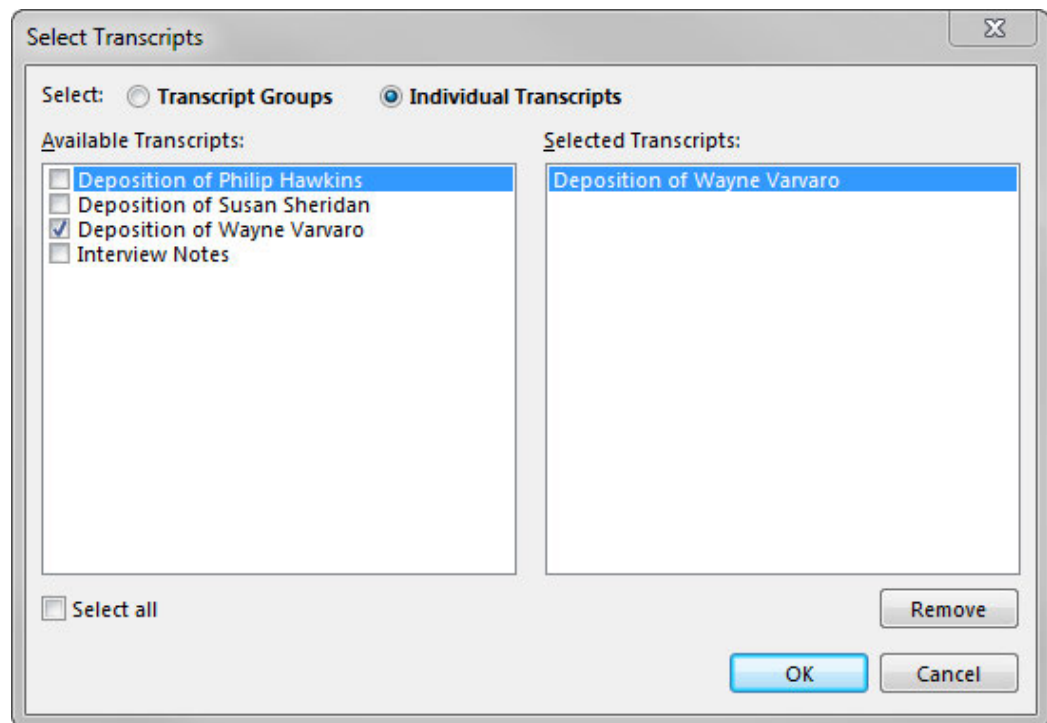
The Send Transcript to Sanction dialog box opens.



To select multiple transcripts

- a. In the **Send Transcript to Sanction** dialog box, click **Select transcripts**.
- b. In the **Select Transcripts** dialog box, click **Transcripts Groups** to list transcripts by groups, or click **Individual Transcripts** to list transcripts individually.

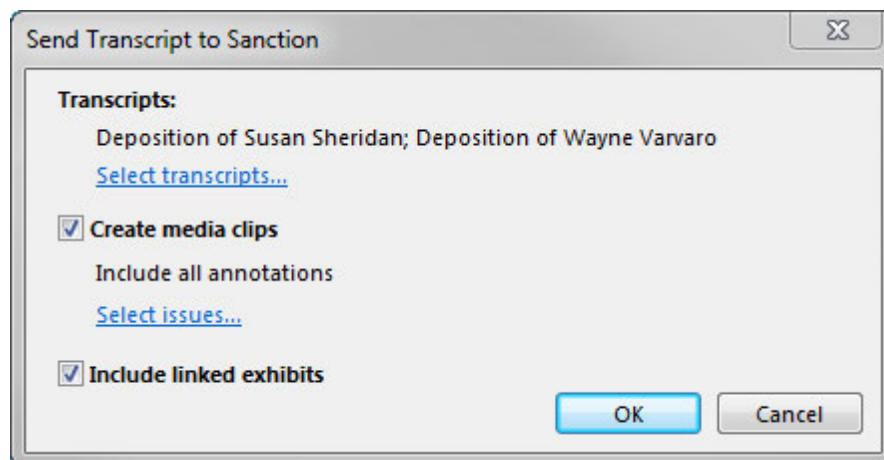
For this example, Individual Transcripts has been selected.



- c. In the **Available Transcripts** column, place a check mark beside transcript(s) to be sent to Sanction.

Optional: Place a check mark in the Select all check box to simultaneously select all transcripts.

- d. Click **OK** to display the **Send Transcript to Sanction** dialog box.



To include media clips when sending transcripts to Sanction, see [Sending annotations as Sanction media clips](#).

4. In the **Send Transcript to Sanction** dialog box, click **OK**.

Related Topics

- [About transcripts](#)
- [About annotations](#)
- [Sending annotations as Sanction media clips](#)
- [Editing videos](#)

Sorting Data

About sorting

Sorting determines the order that case elements display in pane views, allowing you to review information in various ways to determine what items need to be addressed first or categorized based on the status of items. Sorting is distinct to each user ID and does not affect the view that others see for this spreadsheet.

Transcripts can be sorted in alphabetical order by name, or by transcript or import date/time. TextMap saves the sort order last used when you re-open the case.

You can sort data in the following places:

- **Transcripts pane** — Sort transcripts or transcripts groups alphabetically by name or by the transcript's date/time, or by the import date.
- **Annotations pane** — Sort by columns in the Annotations pane by Source, Note, Linked Issue, Linked Fact, Text, Created By, and Creation Time Stamp.

- ☑ Sorting is independent of any filter function. If you filter transcripts or annotations, they are still sorted as specified by the view's sort order.

Related Topics

- [Sorting annotations](#)
- [Sorting transcripts](#)
- [About filtering](#)
- [About searching](#)

Sorting transcripts

The Transcripts pane allows you to sort transcripts in alphabetical order, by date and time, and name. TextMap saves the sort order last used when you re-open the case.

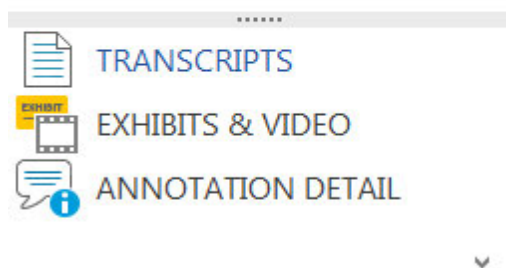
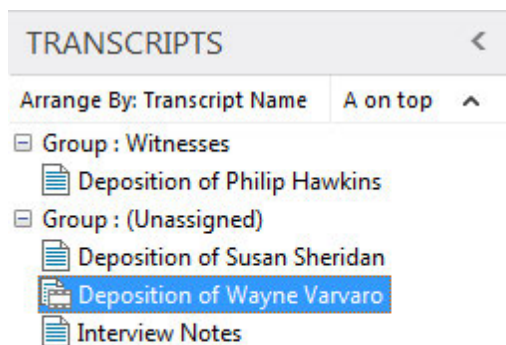
Setting the date/time option is useful when a case contains multiple depositions from the same person. Dates display in brackets to the left of the transcript name in the Transcripts pane. The date and time options are set in the Options dialog box, accessible from the Tools menu. Options are personal to each user's view, and do not affect other users in the same case. If a user changes the date of a transcript, the updated date immediately displays in the list.

When changing from a name sort to a date sort, and vice versa, the Transcripts pane automatically sorts in ascending order from A to Z.

To sort transcripts in alphabetical order

1. In the **Transcripts** pane, click on the **A on top** button to sort transcripts alphabetically in descending order from A to Z.

You can also click on the View ribbon, and then on the Arrange By tab, click Transcript Name.



2. Click on the button again to resort transcripts in ascending order from A to Z.

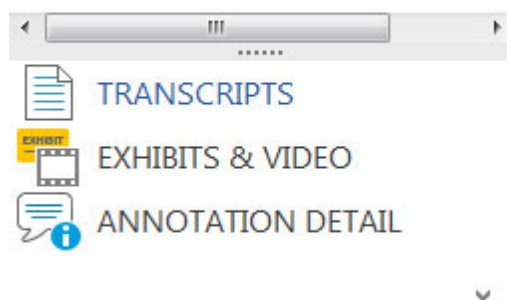
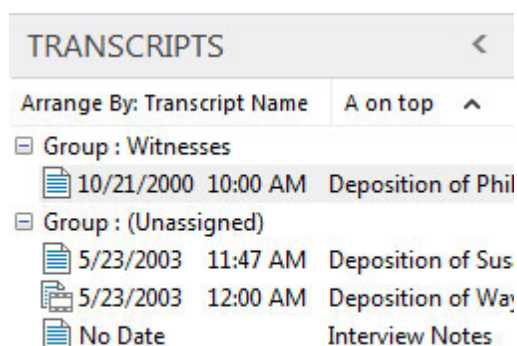
- On the shortcut menu, click **Transcript Name**.

 To sort transcripts by date and time

- On the **File** menu, click **Options**.
- In the **Options** dialog box, click the **Transcripts** tab.
- Select the check boxes for **Show transcript date** or **Show transcript time**.

You cannot select the Show transcript time check box without also selecting the Show Transcript date check box.

- Click **OK** to close the **Options** dialog box.
- In the **Transcripts** pane, notice that the date and/or time for each transcript now displays.



Transcripts or interview notes without a date sort to the bottom and display No Date in the Arrange By: column.

Transcripts will sort by date even if you choose not to display the date and time in the Transcripts pane.

- Right-click on the **Arrange By:** column header and click **Transcript Date** or **Import Date**.

Transcripts sorted by date can then be sorted from oldest to newest.

7. You can also click the **Oldest on top** button to sort transcripts from oldest to newest by date and/or time.

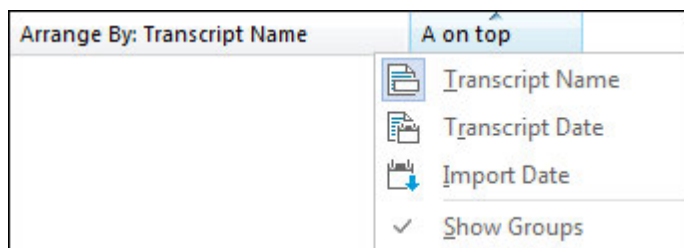
To resort the list, click the **Newest on top** button.

To remove the date and time from the Transcripts pane, click Options on the Tools menu and clear the check boxes for showing the transcript date or time on the Transcript tab.

To sort transcripts by group

1. In the **Transcripts** pane, click the **Arrange By:** column header to choose how you want to sort transcripts.

You can also click on the View ribbon and then select the Show Groups check box.



2. On the shortcut menu, click **Show Groups**.

Related Topics

[About transcripts](#)

[Importing transcripts](#)

[Creating transcript groups](#)

Sorting annotations

The Annotations pane allows you to sort annotations by columns: Source, Note, Linked Issues, Linked Fact, Text, Created By, and Creation Time Stamp. The default sort order is by page/line number.

To sort annotations

1. In the **Transcripts** pane, click on the transcript for which you want to view annotations.
2. In the **Annotations** pane, click on the column you want to sort by.

DEPOSITION OF SUSAN SHERIDAN [DRAFT]						6 ANNOTATIONS	
Source	Note	Linked Issues	Linked Fact	Text	Created By	Creation Time Stamp	
Pg 15 ln: 14 - 18	I found this passage by re...	Background	No	Q: How would you de...	Chris Attorney	1/15/2008 12:05:12 PM	
Pg 17 ln: 6 - 13	Here we have testimony t...	Possible impeachment	No	Q: And what happene...	Chris Attorney	1/15/2008 4:48:50 PM	
Pg 17 ln: 18 - 23		Pattern&Practice	No	Q: Okay. So someone...	Chris Attorney	1/15/2008 4:50:42 PM	
Pg 22 ln: 21 - Pg 23 ln: 1		Transfer	No	Q: Okay. And in your ...	Chris Attorney	1/15/2008 4:52:03 PM	
Pg 22 ln: 1 - 8	Medi defense possible. P...	RefuseToRetestify, Mandat...	No	A: Connect	Chris Attorney	1/15/2008 4:54:11 PM	

For example, if you want to sort all annotations by linked issues, click on the Linked Issues column.

All annotations now display by linked issues and in alphabetical order. An arrow displays in the column indicating which column annotations are sorted by.

Related Topics

- [About sorting](#)
- [About filtering](#)
- [Viewing annotations](#)
- [Filtering annotations](#)

Filtering Data

About filtering

TextMap allows you to filter both transcripts and annotations. Filtering enhances your viewing capabilities by allowing you to find and focus on specific transcripts or annotations more efficiently. Filtered data remains in the current viewing pane (Transcripts pane or Annotations pane); while other data is temporarily hidden from view.

Related Topics

- [Filtering transcripts](#)
- [Filtering annotations](#)
- [About sorting](#)

Filtering transcripts

Filtering transcripts allows you to quickly locate a transcript and load it for display.

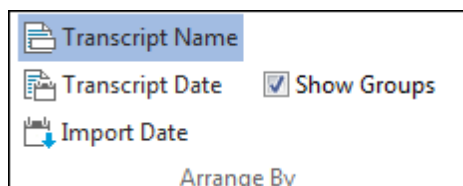
 A minimum of 30 transcripts must be imported into the case before the Filter Transcripts by

Name box displays in the Transcripts pane.

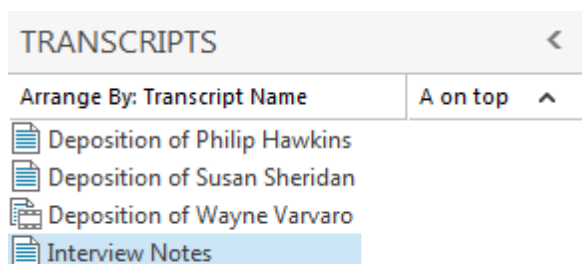
TextMap will automatically save any transcript filter you have. If you close a case, TextMap will display transcripts with the last filter applied.

To filter transcripts by name

1. On the **Arrange By** menu of the **View** ribbon, click **Transcript Name** to sort accordingly all Transcript by name.



The Transcripts pane now displays the transcripts sorted based on the filter.



The transcript now displays in the Transcript window, and any annotations now display in the Annotations pane.

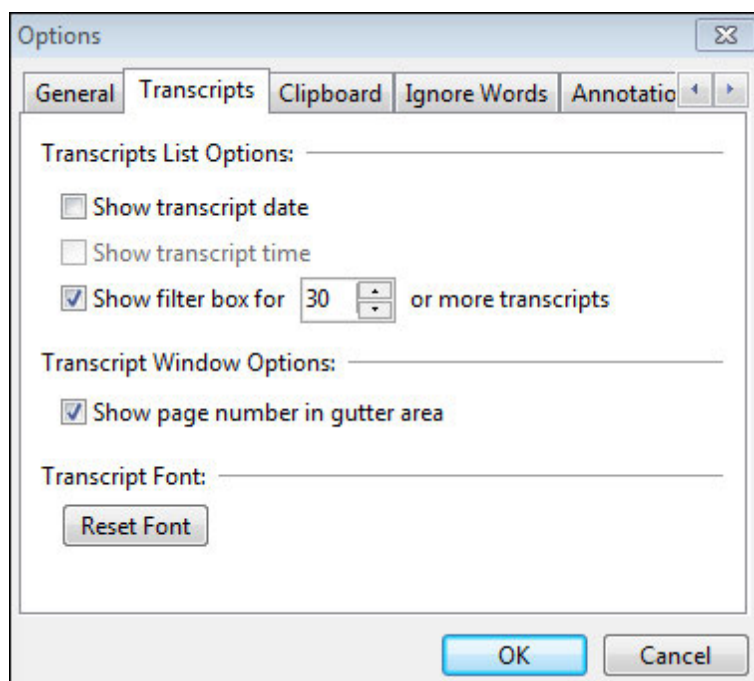
To clear the transcript filter

You can clear the transcript filter four ways:

- Click the Clear button  next to the Filter Transcripts by Name box.
- Select text in the Filter Transcript by Name box and then press the Delete key.
- On the View menu, click Show All Transcripts.
- Press the Esc key.

To modify or disable the transcript filter setting

1. On the **File** menu, click **Options**.
2. In the **Options** dialog box, click on the **Transcripts** tab.



3. In the **Transcripts List Options** area, click the up/down arrows in the number list to set it to the minimum number of transcripts you want in a case before the Filter Transcripts by Name box displays.

The default setting is for the filter box to display after 30 transcripts are imported into a case. You can adjust this setting by depending on the number of case transcripts in your case.

4. Clear the **Show filter box for 30 or more transcripts** if you want to disable the Filter Transcripts by Name box from displaying in the Transcripts pane.
5. Click **OK** to save your settings.

Related Topics

[About filtering](#)

[Sorting transcripts](#)

Filtering annotations

TextMap now allows you to filter annotations by creator or linked issues. To apply an annotation filter, click the View ribbon and select Filter by Creator or Filter by Linked Issues. (No Filter is the default view, where all annotations display). The selected filter is then applied to all transcripts in the case for the current user session or until another filter option is selected. When you close or re-open a case, any previously applied filters are automatically cleared. The annotation filter status displays in the top right corner of the Annotations pane.

- ✍ If you or another user deletes an annotation or issue while a filter is applied, it will be deleted regardless.

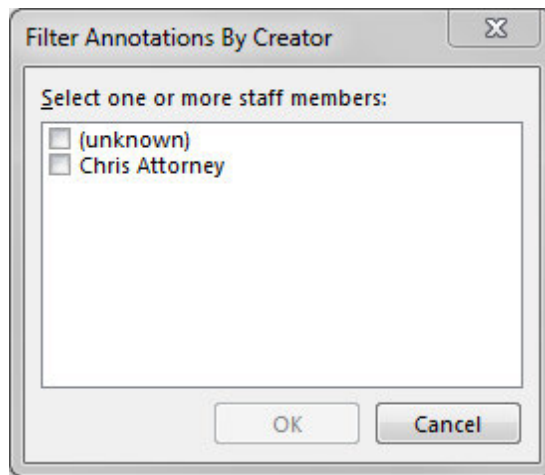
View filtering considerations

Reference the following table to learn about considerations that affect filtering.

Filtering Considerations	
Filters	Description
Filter by Creator	Any new annotations added by other case users when the filter is running only display if they match the current filter.
	If there are no annotations for selected users, the Annotations pane displays a message, Filter Excludes All Annotations.
	Case users who have been deleted will still display with that designation. If an annotation has "unknown" as the creator, you can assign it to another users. See Changing annotations' owner status .
	If the Filter by Creator menu item is grayed out, the case does not currently have any users.
Filter by Linked Issues	Annotations created or edited when the filter is running only display if they match the current filter.
	If you select a parent issue, all child issues are also selected. Clear the check box for any issue you do not want in the filter.
	If an issue filter is already applied, those issues will already be selected in the Filter Annotations by Linked Issues dialog box.
	If there are no annotations for selected issues, the Annotations pane displays a message, Filter Excludes All Annotations, and the Filter by Annotations by Linked Issues dialog box displays a message, There are no issues in this TextMap case.

To filter by creator

1. On the **View** ribbon, click **Filter by Creator** on the **Filter Annotations** tab.
2. In the **Filter Annotations by Creator** dialog box, select one or more users to filter by.



3. Click **OK** to apply the filter.

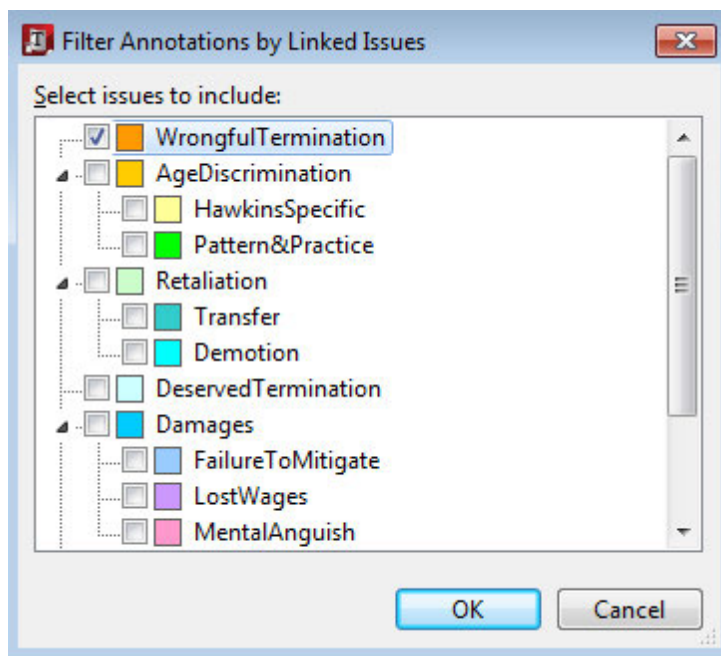
Only annotations by selected users now display in the Annotations pane.

The information bar in the top right corner of the Annotations pane now displays the number of annotations filtered and total annotations in the transcript.

To filter by linked issues

1. On the **View** ribbon, click **Filter by Linked Issues** on the **Filter Annotations** tab.
2. In the **Filter Annotations by Linked Issues** dialog box, select the check box for each issue you want included in the filter, then click **OK**.

You can also right-click to check or clear all issues.



Only annotations linked to the selected issues now display in the Annotations pane.

To clear an annotation filter

1. On the **View** menu, click **No Filter** on the **Filter Annotations** tab.

The previous filter is now removed from all transcripts in the case.

If you select another filter option, the previous filter is cleared and the new filter is applied.

Related Topics

[About annotations](#)

[Creating annotations](#)

[Viewing annotations](#)

[Sorting annotations](#)

Searching Data

About searching

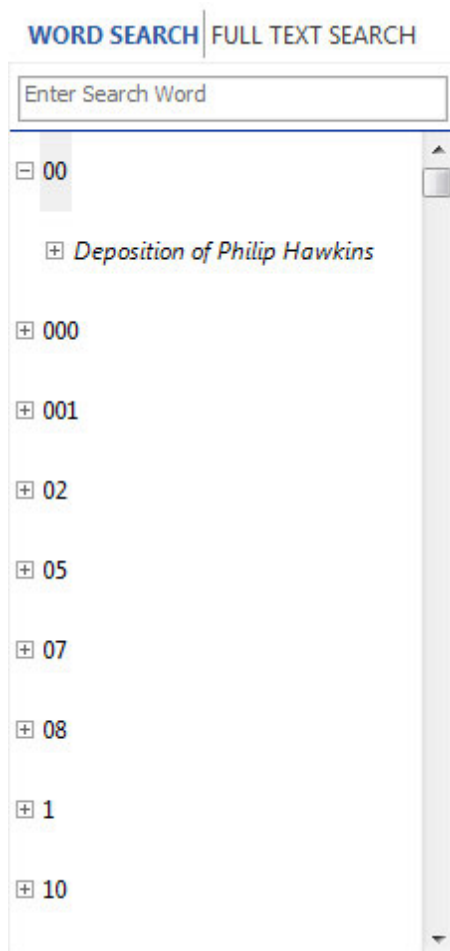
TextMap allows you to quickly search all transcripts, exhibits, documents, annotations, and notes in your case because it automatically creates a case index during the import process.

There are two methods of searching in TextMap:

- **Basic Word Searches** — performing single word searches to locate all instances of the word in transcript text.
See [Running basic word searches](#).
- **Full-Text Searching** — performing full-text searches against transcript text, annotations, and exhibits.
See [About full-text searching](#).

Learn how the case index works

TextMap creates a case index when you import transcripts and files into a case. During the indexing process, TextMap reads each imported document and compiles a case index based off the each word it reads.



The screenshot shows the TextMap search interface. At the top, there are two tabs: "WORD SEARCH" (selected) and "FULL TEXT SEARCH". Below the tabs is a search input field labeled "Enter Search Word". Below the input field is a list of case index entries. The first entry is "00" with a minus sign icon, and it is expanded to show "Deposition of Philip Hawkins". Below this are several other entries with plus sign icons: "000", "001", "02", "05", "07", "08", "1", and "10".

The case index is used when you perform searches so you can locate important words, dates, and text phrases easily in your case.

For more information, see [About the case index](#).

[Learn how ignore words help narrow search results](#)

TextMap provides you with a default, global Ignore List and a Case Ignore Words list. Both lists are used by TextMap to skip or ignore words and text from both lists during searches. Words or alphanumeric text can be added or deleted from either list. When search queries are performed, any words or text added to the lists are skipped and not included in search results or tallied as search "hits".

For more information, see [Modifying ignore words](#).

[Related Topics](#)

[Running basic word searches](#)

[Running full-text searches](#)

[Running full-text searches](#)

About the case index
Rebuilding the case index
Modifying ignore words

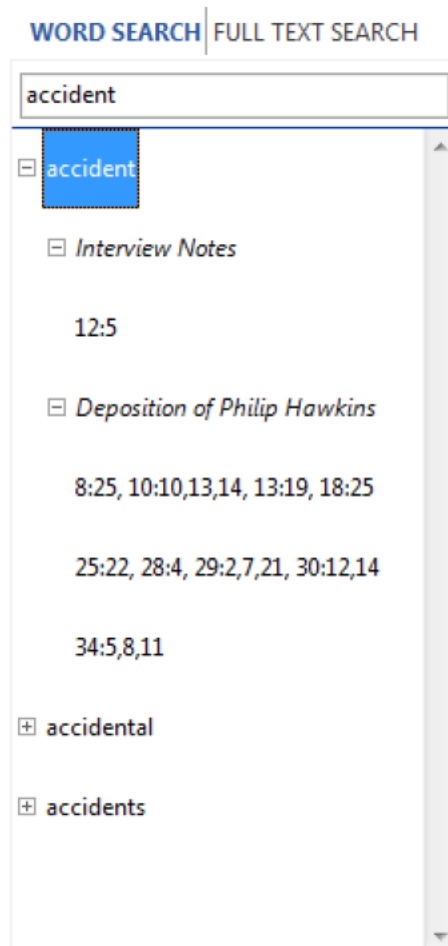
Running basic word searches

Basic word searches are performed to locate all instances of a single word in transcript text for all transcripts in a case. Transcripts that include the search term display in the Word Search pane. Under each transcript are page/line number hyperlinks that jump directly to the search term for that transcript. When you click on a hyperlink, the applicable transcript displays in the main TextMap pane with the search term highlighted.

If you want to search selected transcripts, exhibits, documents, and annotations, you need to run a full-text search. See [Running full-text searches](#).

To run a basic keyword search

1. In the **Search** pane, click the **Word Search** tab.
2. In the **Word Search** box, type in the word you want to locate.



- By default, only the words for the selected transcript are displayed in the search results for large cases when it has more than 100 transcripts.

As you type, you will see partial word results display as TextMap matches the root word to other similar words.

Search results display in the Word Search pane and are grouped by transcript.

- Point your mouse to a hyperlink to display a preview of the the search term that includes the two lines before and after it in the transcript.
- Click on a page/line number hyperlink to jump directly to the search term within the applicable transcript.

The applicable transcript displays in the main TextMap pane with the search term highlighted for easy identification.

Related Topics

[About searching](#)

[About full-text searching](#)

[Running full-text searches](#)

[Running form-based searches](#)

Modifying ignore words

Full-text Searching

About full-text searching

Full-text searching allows you to run both form-based and full-text searches on all case transcripts or selected transcripts/groups in your case. Once a full-text search is run, you can view and narrow your results in the Search pane.

TextMap offers two methods of full-text searching:

- The **Full Text Search** tab allows you write your own search queries and locate key case information by narrowing your search by categories: transcript text, exhibits, and annotations (also by select issues). You can search all case transcripts or select individual transcripts or transcripts groups. Once a full-text search is run, you can view and narrow your results in the Full-Text Search tab in the Search pane.

For more information, see [Running full-text searches](#) and [Using search operators](#).

- The **Form Based** tab has search operator parameters provided for you and allows you to locate terms without having to learn about search operators. The Form Based tab allows you to learn about full-text searching without having to write your own queries. Form-based searches are run in the Full Text Search dialog box in the Form Based tab. Once you understand how to use search operators, you can type your own search queries in the Full Text Search tab.

Use the Search Assistant to write faster search queries

As you type in search queries, TextMap's Search Assistant displays suggested terms from the case index to help you write queries faster. The word options narrow as you continue to type. Once you identify a term, click on it or highlight it and press Enter to add it to the search query. Continue typing terms to complete the search query.

Many common words, such as "they", "the", "it" are not included in the case index. Additionally, any words added to the Ignore Word list will simply be ignored in searches.

For more information, see About the case index and Modifying ignore words.

WORD SEARCH | FULL TEXT SEARCH

wa

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walked

walker

wallace

walls

walsh

walshs

Search all transcripts

[Select transcripts...](#)

Narrow Annotations

Search all annotations

[Select issues...](#)

Related Topics

[About searching](#)

[Running basic word searches](#)

[Running full-text searches](#)

[Using search operators](#)

[Adding terms to the case thesaurus](#)

WORD SEARCH | FULL TEXT SEARCH

(hawkins or sher

sheridan

Narrow Categories

☒ Transcript Text

☒ Annotations

☒ Linked Exhibits

Running full-text searches

Full-text searching allows you to locate key case information by searching transcript text, exhibits, and annotations (also by select issues). You can search each of these categories individually or expand your search further by selecting a combination of categories to include that information in your search results.

The Full Text Search tab also allows you to write your own search queries using search operators, which also help you garner precise search results. See [Using search operators](#).

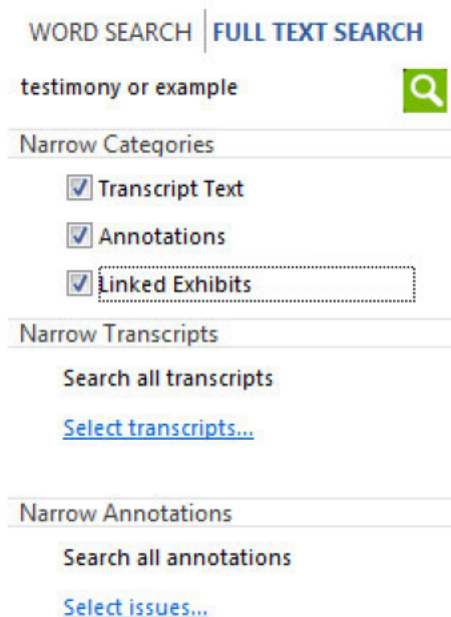
TextMap automatically searches all transcripts by default when a search is run, unless specific transcripts are selected. TextMap will automatically recall selected transcripts from the last search run. This feature is distinct to each user for the current TextMap session. If no searches have been run in the current session, TextMap will default to the All Transcripts setting.

Search results display in the Full Text Search tab after a search is run. See also [Viewing/navigating search results](#).

💡 To preview search results, expand/reduce the range between search terms, write longer complex queries, view search history, re-run saved searches, or access the case thesaurus, see additional [Full Text Search](#) features.

To run a full-text search

1. In the **Search** pane, click the **Full Text Search** tab.
2. In the **Full Text Search** tab, type in your search query.

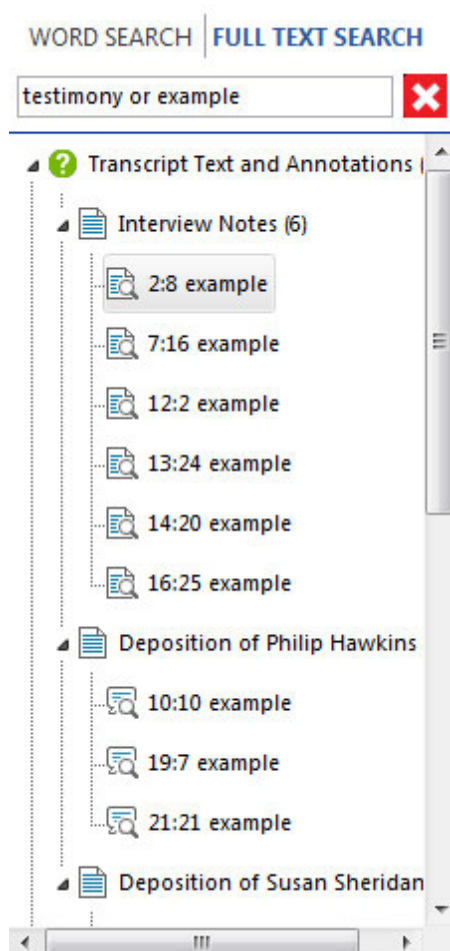


The screenshot shows the 'FULL TEXT SEARCH' tab selected in the Search pane. At the top, there are two tabs: 'WORD SEARCH' and 'FULL TEXT SEARCH'. Below them is a search input field containing the text 'testimony or example' and a green magnifying glass search button. Under the input field is a section titled 'Narrow Categories' with three checkboxes, all of which are checked: 'Transcript Text', 'Annotations', and 'Linked Exhibits'. Below this is a section titled 'Narrow Transcripts' with the text 'Search all transcripts' and a blue link 'Select transcripts...'. At the bottom is a section titled 'Narrow Annotations' with the text 'Search all annotations' and a blue link 'Select issues...'.

3. Click the **Full Text Search** button  to run the query.

Search results are displayed to the right in the Search Pane, and the Search ribbon displays at the top of the workspace.

4. In the **Full Text Search** tab, view the search results.



5. In the **Full Text Search** tab, click on a page/line number hyperlink (example: 15:14) to jump directly to the search term within the applicable transcript or exhibit.

The transcript displays in the main TextMap window with the search term highlighted for easy identification.

6. On the **Search** ribbon, click **Next Hit** to go to the next term.
7. Optional: On the **Navigate** tab of the **Search** ribbon, click on the:

Click the First icon to go back to the first search hit.

Click the Prior icon to go back to the search hit just viewed.

Click the Last icon to go to the last search hit.

For more information on viewing and navigating search results, see [Viewing search results](#).

8. Optional: Click **Search Report** to open the Search Report wizard which is used to create a report of your search results.
9. In the Search Report Wizard, complete all steps as applicable.

See [Printing a Search report](#) for additional information.

10. Optional: Click **Edit** to edit a saved search.

See [To edit a saved search](#) for additional information.

11. Optional: Click Save to save the search.

See [Saving searches](#) for additional information.

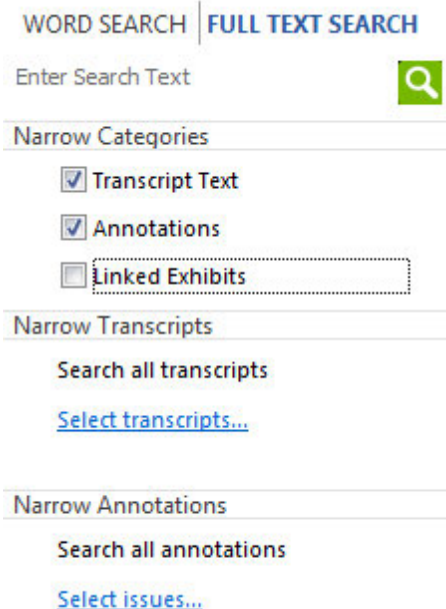
For more information on viewing and navigating search results, see [Viewing search results](#).

To choose which types of case data to search

A search can be performed and/or narrowed using any combination of categories (i.e., Transcript Text and Annotations). When multiple categories are selected, results for all categories display in the search results.

1. In the **Narrow Categories** pane, select the check box for each category that you want to search. (i.e., Transcript Text and Annotations).

The Transcript Text check box is selected by default.



WORD SEARCH | FULL TEXT SEARCH

Enter Search Text 

Narrow Categories

☒ Transcript Text

☒ Annotations

☐ Linked Exhibits

Narrow Transcripts

Search all transcripts

[Select transcripts...](#)

Narrow Annotations

Search all annotations

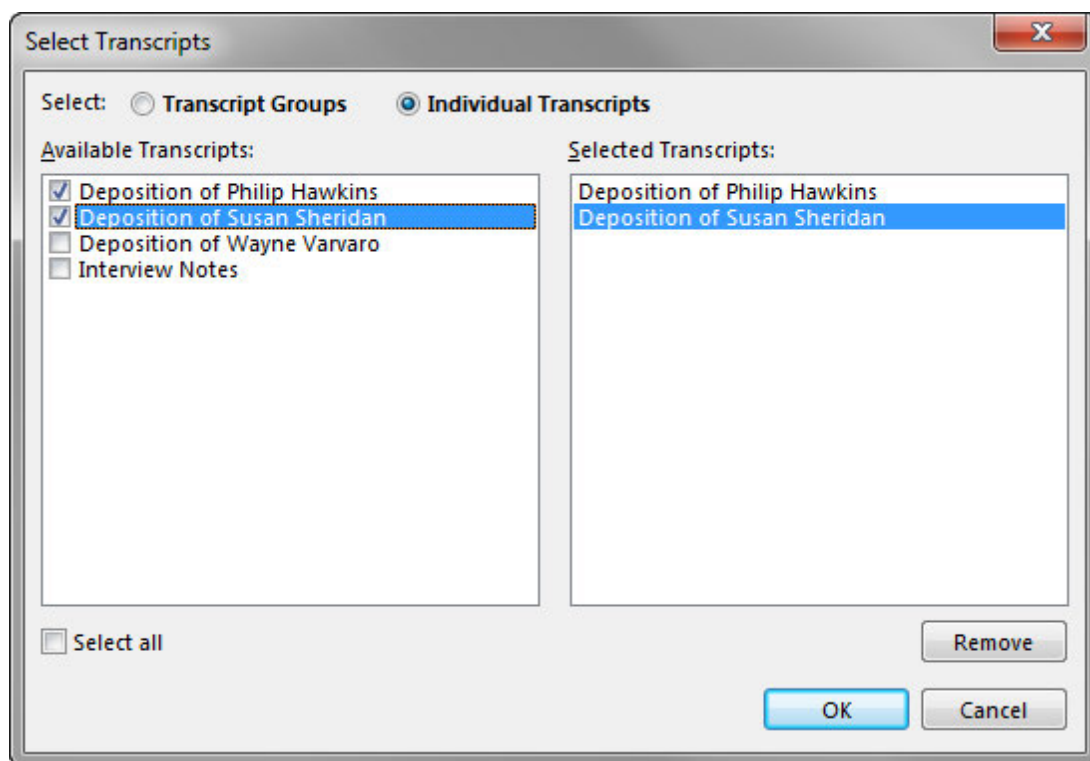
[Select issues...](#)

2. Click the Full Text Search button  to initiate to search.

Results display in the Full Text Search tab (right). Search hits in the transcript text are highlighted, and if the first hit is in an annotation, that annotation will be selected.

To select specific transcripts to search

1. In the **Narrow Transcripts** pane, click **Select transcripts** to select specific transcripts or transcripts groups.



3. In the **Select Transcripts** dialog box, select **Transcript Groups** to search a specific group of transcripts, or select **Individual Transcripts** to select/search specific transcripts only, and then click **OK** to continue.

A Search all transcripts link displays in the Narrow Transcripts pane and can be used to search all transcripts if hits aren't found in previous searches.

4. Click the **Full Text Search** button  to initiate to search.

To limit annotations to specific issues

When searching annotations, search results will include annotations that match the search text and are linked to any of the selected issues. You can also search annotations by entering an issue name in the Search box (e.g. if the you search for the Background issue, TextMap will find annotations linked to the issue Background).

1. In the **Narrow Categories** area, select the **Annotations** check box.

The Annotations check box must be selected for the Narrow Annotations pane to display.

2. In the **Narrow Annotations** pane, click **Select issues** to focus the search on specific issues.

WORD SEARCH | FULL TEXT SEARCH

testimony or example 

Narrow Categories

☐ Transcript Text

☒ Annotations

☐ Linked Exhibits

Narrow Transcripts

Search all transcripts

[Select transcripts...](#)

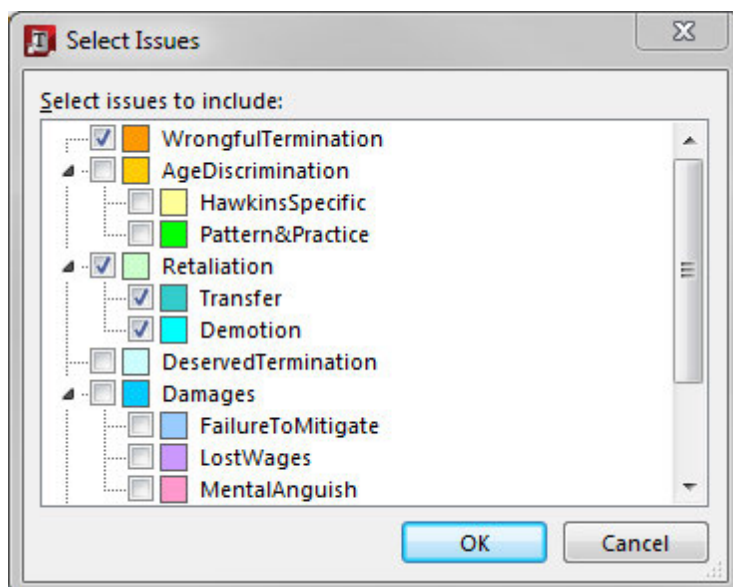
Narrow Annotations

☒ WrongfulTermination...

[Select issues...](#)

[Search all annotations](#)

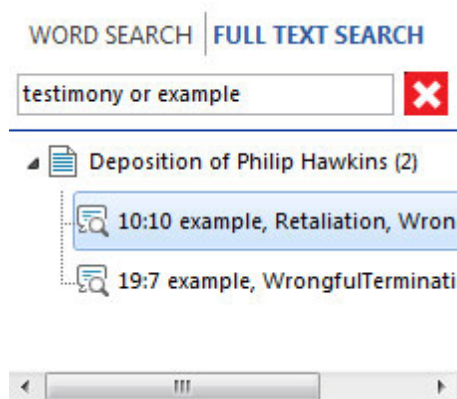
3. In the **Select Issues** screen, select the check box for each issue you want to search, then click **OK**.



The selected issues display in the Narrow Annotations pane.

A Search all annotations link also displays, which can be used to search all annotations if hits aren't found in previous searches. Click Select all annotations to search all annotations and removed the selected issues.

4. Click the **Full Text Search** button  to initiate to search.

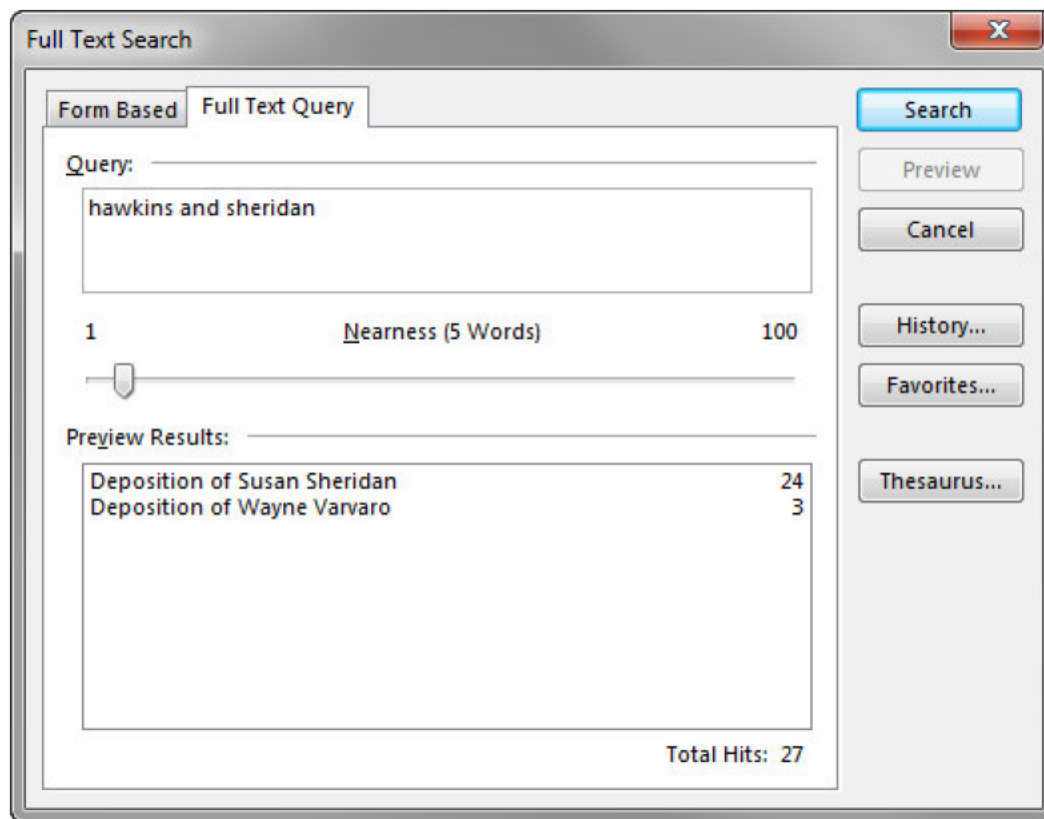


Search results include annotations that match the search text and are linked to any of the selected issues.

If there are no hits/results found based on the search, TextMap will display a message that no hits were found.

[To preview search results, adjust the nearness indicator, view saved searches, or run complex queries](#)

You will run the majority of your searches in the Search pane using the Full Text Search tab (located to the right of the Transcript window). When necessary, however, you can access a few more search features by opening the Full Text Search dialog box from the Search menu.



The Full Text Search tab in the Full Text Search dialog box offers a few more search features:

- Previewing search results without having to load all search results
After you type in a search query in the Query box, you can preview the number of search hits found before loading the full search results. Search results display in the Preview Results box, showing the total number of hits as well as the number of hits found per transcript.
- Adjusting the nearness indicator to expand or reduce the range in which you want locate both words
The Nearness default setting is used to locate search terms within five words of each other. You can expand/reduce this range from one to 100 words.
- Access saved searches in your My Favorites folder or All Users' Favorites
See [Saving searches](#)
- Access the Thesaurus to find word synonyms in searches
TextMap offers both a global thesaurus and a case thesaurus so you can find synonyms or "like" terms that are referenced in your case transcripts.
See [Using search operators](#) and [Adding terms to the case thesaurus](#).
- Viewing search history for the past 30 days.
See [Viewing search history](#).

💡 To open the Full Text Search dialog box from the Search pane, leave the Search Text

box blank and then click the the green arrow button .

Related Topics

- [About full-text searching](#)
- [Using search operators](#)
- [Adding terms to the case thesaurus](#)
- [Viewing/navigating search results](#)
- [Viewing search results](#)
- [Saving Searches](#)
- [Canceling searches](#)
- [Viewing search history](#)

Running form-based searches

Using the Form Based tab is a great way to practice running full-text searches until you are ready to write your own search queries. The Form Based tab has search operator parameters provided for you and allows you to locate terms without having to learn about search operators. Once you understand how to use search operators, you can type your own search queries in the Full Text Search tab.

Form-based searches are run in the Full Text Search dialog box in the Form Based tab (accessible from the Search ribbon). You can narrow your search by selecting categories in the Full Text Search tab in the Search pane. See [Running full-text searches](#).

TextMap automatically searches all transcripts, unless specific transcripts are selected.

[To run a form-based search](#)

1. On the **View** ribbon, click the **Search** icon to open the Full Text Search dialog box.
2. In the **Full Text Search** dialog box, click the **Form Based** tab.

Full Text Search

Form Based **Full Text Query**

Find Transcripts:

with all of the words

with the exact phrase

with at at least one of the words

without the words

Preview Results:

Deposition of Susan Sheridan	2
Deposition of Wayne Varvaro	20

Total Hits: 22

Search Preview Cancel History... Favorites...

3. In the **Find Transcripts** area, type in the search terms for the option(s) you want to use.

- with all of the words
- with the exact phrase
- with at least one of the words
- without the words

You can enter search terms in more than one field to narrow your search results by including or excluding words.

For example, a search with the exact phrase of water damage and with at least one of the words mold, locates all transcripts that include the phrase water damage and also includes the word mold. Transcripts that include the phrase water damage but do not include the word mold will not display in your search results.

💡 Once you have typed in your search terms, click on the Full Text Query tab to view how the search query is written using search operators. Next time you have a similar search, try typing the query yourself.

5. Click the **Preview** button to review the number of search results found.
6. In the **Preview Results** box, review all transcripts located as well as the number of hits found per transcript.
7. Click the **Search** button to run the search query and view the results in the Search pane.
7. In the **Full Text Search** pane, click on a page/line number hyperlink (ex: 15:14 water) to

jump directly to the search term within the applicable transcript.

The transcript displays in the main TextMap window with the search term highlighted for easy identification.

For more information on viewing and navigating search results, see [Viewing/navigating search results](#).

Related Topics

[About full-text searching](#)

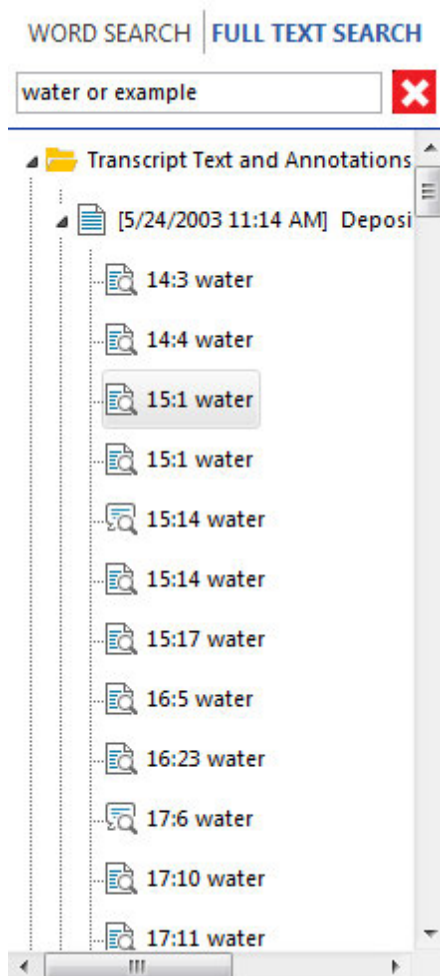
[Running full-text searches](#)

[Using search operators](#)

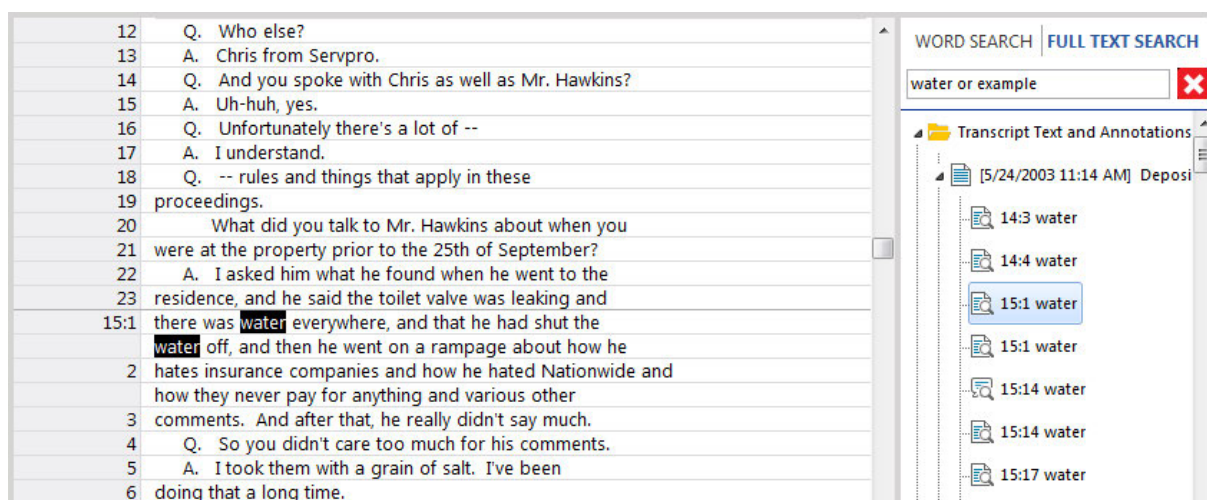
[Viewing search results](#)

Viewing/navigating search results

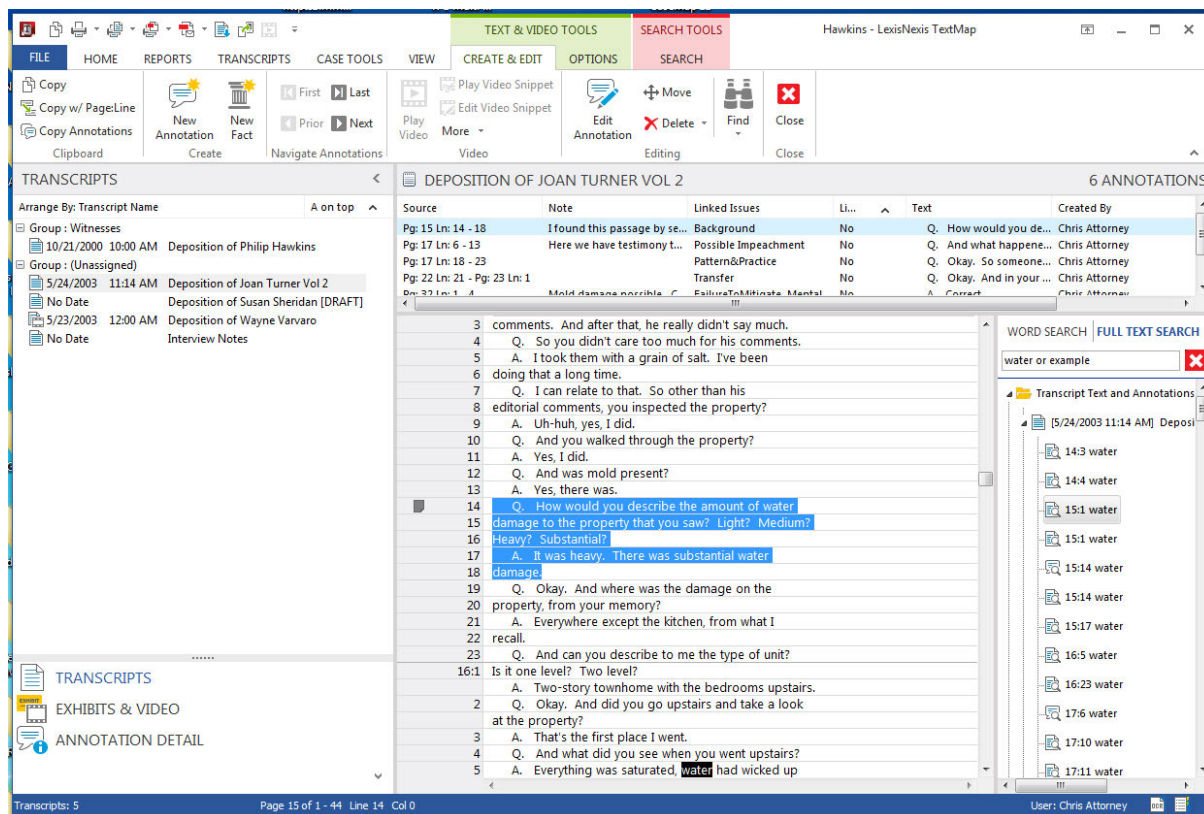
After a full-text search is run, results display in the Search pane in the Full Text Search tab. Search hits for transcripts text, annotations, and exhibits display by transcript. Annotation hits have a yellow comment icon to help distinguish between transcript text and annotations hits.



The first transcript text hit in your search results is highlighted in black and displays in the main Transcript window (center pane).

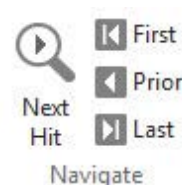


If annotations are included in the search (shown in the screen shot below), then the first annotation is displayed in the Transcript window for the first transcript in your search results. The annotation is also highlighted in the Annotations pane (top, above the transcript).



In the Full Text Search tab, you can navigate search hits by:

- Clicking on the transcript text page/line number (e.g., 20:15 testimony) in the Full Text Search tab to jump directly to the search term within the applicable transcript.
- Clicking on an annotation page/line number (e.g., 10:10 example) to jump directly to the annotated text within the applicable transcript.
- Clicking on an exhibit (e.g., Exhibit 1 (1) example) to view the exhibit in the file viewer window.



On the Search ribbon, you can use the features on the Navigate tab to navigate and view transcript text and annotation hits. If annotations are included in the search hits, then you can also find these features in the Annotation Detail Pane under the Annotation Properties area.

- **Go to First** — Click Ctrl+F7 to navigate to the first search hit.
- **Go to Prior** — Click or press F7 to navigate to a prior search hit.

- **Go to Next** — Click or press F8 to navigate to the next search hit.
- **Go to Last** — Click Ctrl+F8 to navigate to the last search hit.

 Search results can be printed in a Search Report. The Search Report option, available on the Search menu, opens the Search Report Wizard which can be used to create a report of the current search results. See [Printing a Search report](#).

Related Topics

[About searching](#)

[About full-text searching](#)

[Running full-text searches](#)

[Running form-based searches](#)

[Printing a Search report](#)

Using search operators

Search operators allow you to write your own advanced queries to garner precise search results in your case transcripts and notes. Once you learn to use search operators, you can advance to typing complex searches that will help you locate facts and details that might otherwise take hours of transcript review to uncover.

Full-text queries can be run from the Full Text Search box in the Search pane (or from the Full Text Search dialog box in the Full Text Query tab). See [Running full-text searches](#).

Full-text searches use the following operators:

- Boolean
- Proximity
- Wildcard
- Numeric
- LIKE

[Learn about Boolean operators](#)

Boolean operators are based on the binary logic used in computers today, producing strict true or false results. The most common Boolean operators are AND, OR, and NOT.

Search terms are not case sensitive; you don't have to enter all caps for "AND" when typing a search query. However, it is important to type spaces between the search terms and the

operator being used.

Boolean Operators		
Operator	Query	Results
AND contains both words	water AND damage	All transcripts with both the words: water and damage
OR contains either word	water OR damage	All transcripts with either water or damage, or both
NOT contains first word, but not second	water and NOT damage	All transcripts with water, but not damage

[Learn about proximity operators](#)

Proximity operators are useful in finding text that appears in transcripts within a specified range of words. The proximity operators used in TextMap are NEAR and BEFORE.

You can use the Nearness scroll bar to adjust the range of terms you want from zero to 100. This range is the maximum number of intervening indexed words, excluding those on the ignore list. The Nearness default range is set to five terms.

Proximity Operators		
Operator	Query	Results
NEAR	water NEAR3 mold	Both terms appear within three words of each other
BEFORE	water BEFORE3 damage	All transcripts where water is three words before damage

[Learn about wildcard operators](#)

Wildcard operators are symbols you can use as a substitute for characters or series of characters, creating a broader search with stronger results.

Wildcard Operators		
Operator	Query	Results
Asterisk * replaces a character at the beginning or end of a search string	*count*	Finds the following: account, accountant, country, countries, and discount
	leak*	Finds the following: leak, leakage, leaking
	*holding	Finds the following results: withholding
Question mark ? represents any character in its place in the character sequence	wom?n	Finds the following: woman, women
	??99	Finds all dates in the year 1999
	10:??	Finds all timeframes of 10:00 o'clock (a.m. or p.m.), i.e. 10:00, 10:42
[] represents any character specified within the brackets [afp], or in a range of characters specified in its place in the character sequence [a-z]	New[a-s]	Finds news, but not newt
	New[prt]	Finds newt, but not news

[Learn about numeric operators](#)

Use numeric operators to help you locate numbers in a transcript.

Numeric Operators			
Operator		Query	Results
< than	less	< 50	Finds numbers less than 50
		Florida < 32803	Finds Florida followed by a number less than 32803
> greater than		> 50	Finds numbers greater than 50
<= less than or equal to		<=50	Finds numbers less than or equal to 50
>= greater than or equal to		>=50	Finds numbers greater than or equal to 50
= to	equal	=50	Finds the number 50

Numeric Operators		
Operator	Query	Results
<x and >x not equal to	<50 and >50	Finds all numbers except 50

Learn about the LIKE operator

Use the LIKE operator to find synonyms from the global and case thesauruses for the search term you specify. The global thesaurus and case thesaurus include lists of terms that have been defined as having the same meaning. You cannot add new terms to the global thesaurus, but you can add terms to the case thesaurus so you do not miss those references in a transcript search. This is especially helpful if you have a case with many similar terms mentioned that may mean the same thing.

Example: LIKE water

A search like this may return results for irrigation and wet.

Example: LIKE aspirin

For a case involving the pain reliever aspirin, you may want to add the terms: Advil®, Bayer®, ibuprofen, and Tylenol®.

Example: LIKE mold

For a case involving mold, you may want to add the types of mold strains, such as Stachybotrys, Penicillium, and Aspergillus.

For more information, see [Adding terms to the case thesaurus](#).

Learn about advanced searches and operator precedence

Advanced queries can combine multiple operators and search terms. TextMap uses a hierarchy to evaluate search queries and return results in a specific order. When you combine search queries, you can use parentheses to enforce operator precedence. Searches within parentheses are evaluated before they are combined with other search operators. Parentheses have the highest precedence.

How the operator hierarchy works

TextMap searches terms in a query in the following operator precedence.

Operator order of precedence:

- Wildcard characters
- LIKE

- Numerics
- NOT
- OR
- BEFORE, NEAR
- AND

Example: mold AND carpet OR drywall

In this query, "carpet OR drywall" has search precedence over "mold AND".

The same would be true if the query were reversed: "carpet OR drywall AND mold". Both queries return the same results.

Example: mold BEFORE carpet NEAR drywall

Search queries that have operators at the same precedence level are processed from left to right. In the example query, "mold BEFORE carpet" is processed first, then "NEAR drywall".

The query can be reversed by using parentheses to override the operator precedence.

Example: mold BEFORE (carpet NEAR drywall)

In this query, the search term and operator within the parentheses (carpet NEAR drywall) is processed first, regardless of the left-to-right precedence.

Use parentheses to enforce operator precedence

When formulating search queries with more than one search operator, we recommend you use parentheses. By using parenthesis, you can force TextMap to search the terms you type within the parentheses first, regardless of operator precedence. This allows you flexibility in formulating your own searches and garnering stronger results.

Example: mold NEAR25 (seminar* OR train*)

This query returns results where "mold" appears in a transcript within 25 words of "seminar", "seminars", or "training".

The OR operator carries precedence because the search results do not return instances where "mold" may appear in a transcript within a range of 50 words of "seminar", "seminars", or "training".

How to formulate complex queries

Complex queries are advanced queries that contain two or more operators and multiple search terms. Using parentheses helps to offset search terms so you can read your queries easier.

Example: valve OR main NEAR25 crew OR LIKE employees

This query returns results for "valve" or "main" first. Then TextMap finds these terms

within a range of 25 words of "crew" or synonyms of "employees". You can adjust the range of words by moving the Nearness indicator in the Full Text Query tab or simply changing the number value typed with the NEAR operator.

Because of operator precedence, this query is also the equivalent of: (valve OR main) NEAR25 (crew OR LIKE employees).

Example: LIKE water NEAR50 valve* OR main

This query finds "water" or synonyms of water within a range of 50 words of "valve", "valves", or "main".

Because of operator precedence, this query is also the equivalent of: (LIKE car) NEAR50 (valve* OR main)

Related Topics

- [About full-text searching](#)
- [Running full-text searches](#)
- [Creating transcript groups](#)
- [Adding terms to the case thesaurus](#)
- [Saving searches](#)
- [Viewing search history](#)

Viewing search history

TextMap stores your full-text search queries for up to 30 days. You can view and reference search history from Search menu by clicking Full Text Search and then clicking the History button. Search history is individual to each user ID; you will not see other users' search history.

Search history for each stored query includes the query text and the date/time the search was run. Click on an individual search to display search details, including the query text. Searches can be reloaded to edit or re-run from the Full Text Search dialog box.

Delete searches as needed to clear search history. Once a search is deleted it is permanently removed from the case. Any searches older than 30 days are automatically deleted by TextMap.

To view search history

1. On the **Search** ribbon, click **Edit** to open the **Full Text Search** dialog box.

 A search must be run to activate the Edit button.

2. In the **Full Text Search** dialog box, click the **History** button.
3. In the **Search History** dialog box, scroll to view recent search history.
4. Click on a search to view search details, including the query text and transcripts included when the query was run.
5. Click **Close** when you are finished.

To load and rerun a stored search

1. On the **Search** ribbon, click **Edit** to open the **Full Text Search** dialog box.
2. In the **Full Text Search** dialog box, click the **History** button.
3. In the **Searches** box, click on the search you want to edit or run again.
4. Click the **Load** button to open the Advanced Search dialog box.
Notice that the search now displays in the Query box in the Full Text Query tab.
5. Click the **Search** button to re-run or edit the search.

To delete search history

1. On the **Search** ribbon, click **Edit** to open the **Full Text Search** dialog box.
2. In the **Full Text Search** dialog box, click the **History** button.
3. In the **Search History** dialog box, highlight the searches you want to delete.
4. Click the **Delete** button.
5. In the message box, click **Yes**.
6. Click **Close** and then click **Cancel** to continue.

Related Topics

[About full-text searching](#)
[Saving searches](#)

Saving searches

There are many reasons to save your search queries. One primary benefit is that once saved, you can re-run them on updated case transcripts to collect new search results.

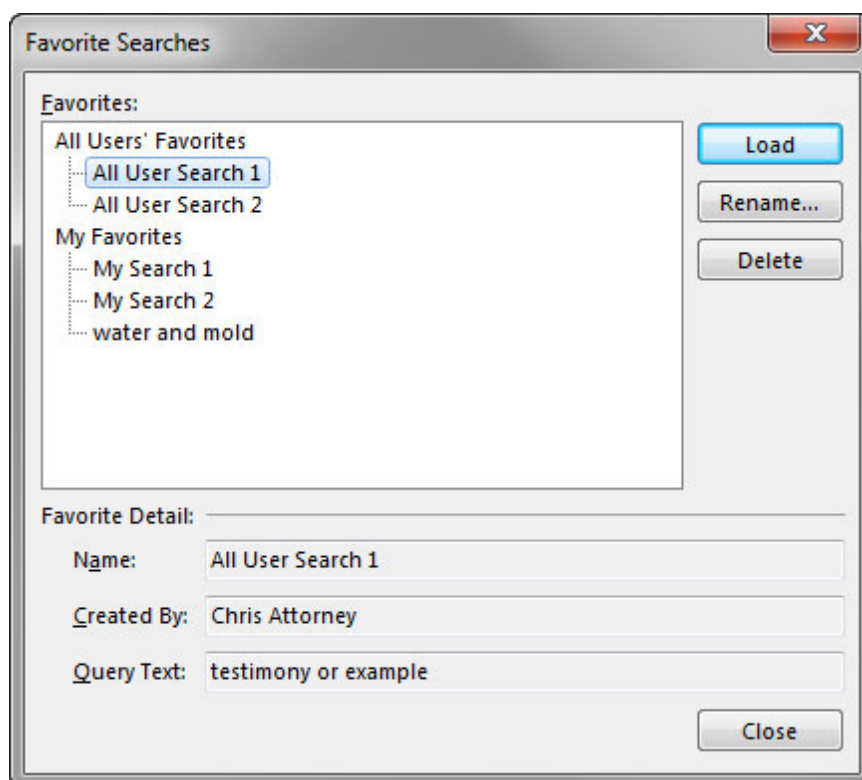
Reasons to save your search queries:

- You need to perform the same search more than once.

- You create complex queries and do not want to retype or forget them.
- You can re-run searches when new transcripts are imported into the case.
- Other case staff can run or build upon saved searches, saving data entry time.
- You are interrupted during a complicated set of searches that you want to resume later.

You can save search queries two ways:

- **My Favorite Searches** — Search queries you save that only you can re-run.
- **All Case Users' Favorite Searches** — Search queries saved and accessible for all case staff to run.



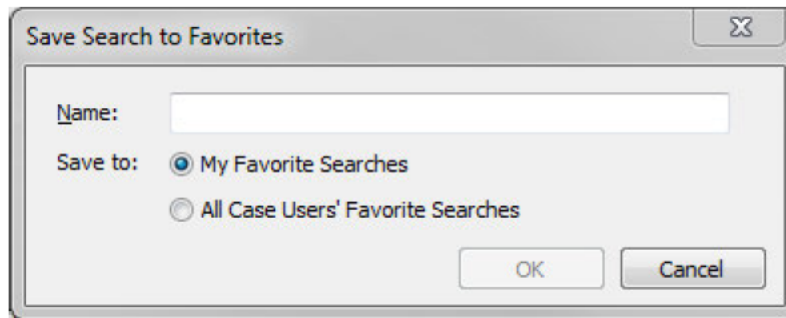
Saved searches are stored in Favorites folders: All Users' Favorites or My Favorites (your personal searches). Each saved search name must be unique when saved within a Favorites folder, though both folders may contain searches with the same name. Search names are case sensitive and can be up to 50 characters. Saved searches display in alphabetical order.

You can overwrite previous saved searches with the same name. TextMap displays a message box when you try to save a search with a search name that has already been used. You have the option to overwrite the previous saved search or you can save the search with a unique name.

In the Favorite Searches dialog box, click on a saved search to view additional information in the Favorite Detail area, including the search name, who created it, and the query text.

 To save a search

1. Run a form-based or full-text search.
2. On the **Search** ribbon, click **Save**.
3. In the **Save Search to Favorites** dialog box, type a name that identifies the query.



4. Select the save option you want: **My Favorite Searches** or **All Case Users' Favorite Searches**.
5. Click **OK** to save the search query.

To re-run a saved search

1. On the **Search** ribbon, click **Edit** to open the **Full Text Search** dialog box.
2. In the **Full Text Search** dialog box, click the **Favorites** button.
3. In the **Favorite Searches** dialog box, highlight the search you want to re-run.
4. Click the **Load** button.

The search now displays in the Query box in the Full Text Query tab.

5. Click the **Search** button to re-run the search.

 You can also re-run searches from the Search History tab. For more information, see [Viewing search history](#).

To rename a saved search

1. On the **Search** ribbon, click **Edit** to open the **Full Text Search** dialog box.
2. In the **Full Text Search** dialog box, click the **Favorites** button.
3. In the **Favorite Searches** dialog box, highlight the search you want to rename, then click the **Rename** button.
4. In the **Rename Favorite Search** dialog box, type in the new search name, then click **OK**.
5. Click **Close** and then click **Cancel** to continue.

To edit a saved search

1. On the **Search** ribbon, click **Edit** to open the **Full Text Search** dialog box.

2. In the **Full Text Search** dialog box, click the **Favorites** button.
3. In the **Favorite Searches** dialog box, highlight the search you want to edit.
4. Click the **Load** button.
5. In the **Query** box on the **Full Text Query** tab, edit the search query.
6. Click the **Search** button to run the search.

To delete a saved search

1. On the **Search** ribbon, click **Edit** to open the **Full Text Search** dialog box.
2. In the **Full Text Search** dialog box, click the **Favorites** button.
3. In the **Favorite Searches** dialog box, highlight the search you want to delete, then click the **Delete** button.
4. In the message box, click **Yes**.
5. Click **Close** and then click **Cancel** to continue.

Related Topics

[About full-text searching](#)
[Using search operators](#)
[Running full-text searches](#)
[Viewing search results](#)
[Canceling searches](#)
[Viewing search history](#)

Canceling searches

After running a search and reviewing the results, you can easily cancel/clear the search results by clicking the Cancel Search button  in the Full Text Search tab.

You can also click on the Search ribbon and then click Close Search, or you can type over a search query in the Full Text Search box and click the Full Text Search button  to run the new search.