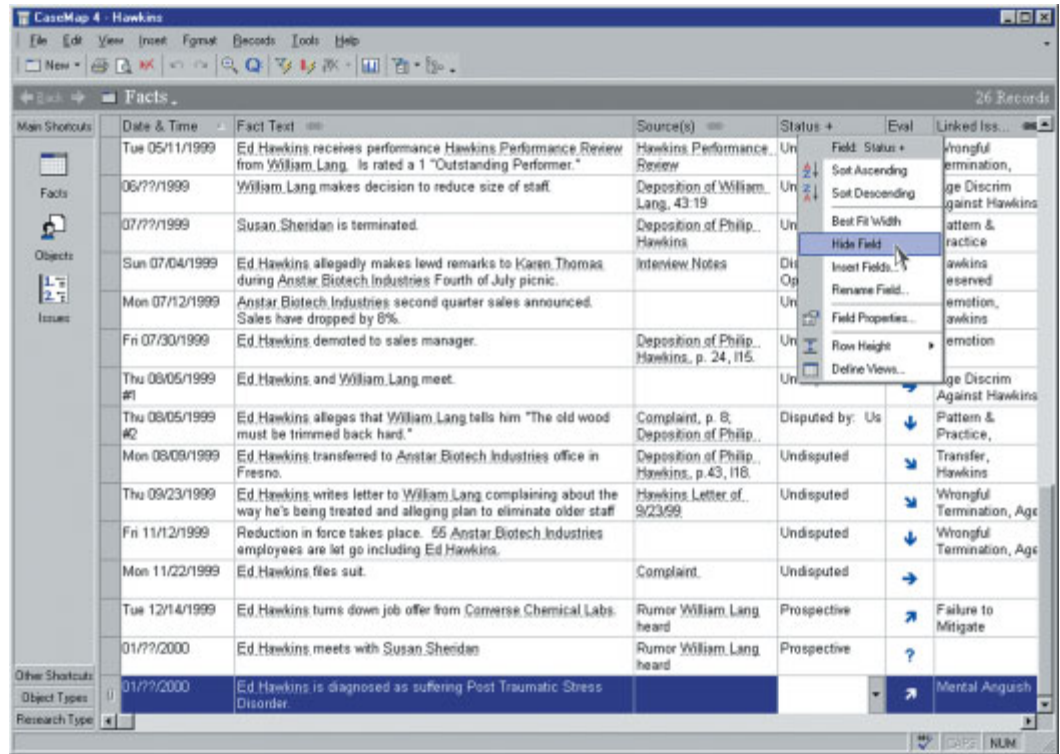## Introducing CaseMap 4

CaseMap 4, the just-released version of our case analysis software product, offers loads of new features. Among the many enhancements are a revamped interface, new spreadsheets that make it easy to organize legal research, more powerful case exploration tools, and dozens of new ease-of-use features, for example, live spell checking.

We believe you'll find that the improvements in CaseMap 4 result in a tool that provides greater functionality and substantial new ease of use for all, novice and expert alike.

While you'll spot oodles of changes the first time you use CaseMap 4, many of the enhancements are under the covers where you can't see them at all. We worked hard to tune performance and to lay the groundwork for future CaseMap development.

Despite the many changes in Version 4, CaseMap's basic mission hasn't changed one iota. CaseMap 4 is still the place to organize and explore your thinking about the facts, the issues, and the cast of characters in every case. It remains uniquely suited for use from the first day of work on any new matter.

CaseMap 4 maintains all links to our TimeMap timeline graphing software and our TextMap transcript management utility. It also integrates with Adobe Acrobat®, Summation, LiveNote, Concordance, Binder, Opticon, Doculex, Sanction, Trial Director, and other software products your firm may already employ.

Special thanks to our many clients who made the suggestions we've incorporated in CaseMap 4!

Please be sure to contact us at support@casesoft.com with any questions and additional suggestions.

Try CaseMap 4 For Free

If you're not already a CaseMap user, the best way to check out the new features in CaseMap 4 is to read this update while test driving the full-feature trial version. The trial version is available at www.casesoft.com.

Upgrading to CaseMap 4

If you're a current CaseMap user, please visit www.casesoft.com/uptocm4.shtml to learn about upgrading. As you would expect, all information in your CaseMap 3 files converts to the new CaseMap 4 file format.

New Look & Feel

We've made an extensive overhaul to CaseMap's interface. We hope you'll find the new look and feel results in a tool that's significantly easier for new users and power users alike.

The interface overhaul is the result of dozens of changes, large and small. Every window and dialog box in CaseMap has been revamped. Here are a few examples:

- A count of the total number of facts, objects, etc., in a case file always displays above the applicable spreadsheet.
- New Back/Forward buttons make it easy to navigate through your recent spreadsheet views.
- You now have full control over the buttons that appear on CaseMap's toolbars. We've set the default toolbar to display a limited number of buttons that we feel are the most important. For more advanced features, you can add buttons to the toolbar.
- When columns are dragged to a new position in the spreadsheet, a hint displays making it easy to see where a column will land when dropped.

New Research Capabilities

We've added two entirely new spreadsheets to CaseMap 4: an Authorities spreadsheet and an Authority Extract spreadsheet.

Use the Authorities spreadsheet to manage top-level information about precedents, statutes, and other types of case research. Use the Authority Extracts spreadsheet to capture details about particular sections of interest excerpted from important case law and statutes.

Here are some of the default fields CaseMap sets up for authorities: Type (e.g., case law, ruling, statute), Citation, Jurisdiction, Notes, Evaluation, Linked Issues, Linked File (permits link to external webpage or file containing the authority). You can also create your own fields to customize this new area.

As you organize research in CaseMap 4, you can sort it, filter it, and put it to work in numerous ways. For example, filter the Authorities spreadsheet down to those relevant to a particular case issue, and print a report of this subset.

CaseMap 4 includes new spreadsheets you can use to organize and explore details about the case law, statutes, and other authorities relevant to your case.

## Live Spell Checking, Legal and Medical Dictionaries, and AutoCorrect

CaseMap 4 offers live spell checking just like that found in today's word-processing programs. As you type, CaseMap flags any words not found in one of the on-line dictionaries. Right clicking words underlined with red wavy lines displays a pop-up menu with suggestions of possible corrections.

To increase the effectiveness of CaseMap 4's spell-checking feature, we've procured a legal-term dictionary and a medical-term dictionary. When you install CM4, these dictionaries are automatically placed on your computer along with the standard American English dictionary.

CaseMap 4 also offers AutoCorrect, another feature found in word-processors, but rare in database programs. As you type, CM4's AutoCorrect feature can fix common typing errors. For example, if you type "teh," CaseMap automatically corrects this transposition error, replacing it with "the."

AutoSizing Cells

CaseMap 4 provides a neat new way of working with spreadsheet cells that contain large amounts of text.
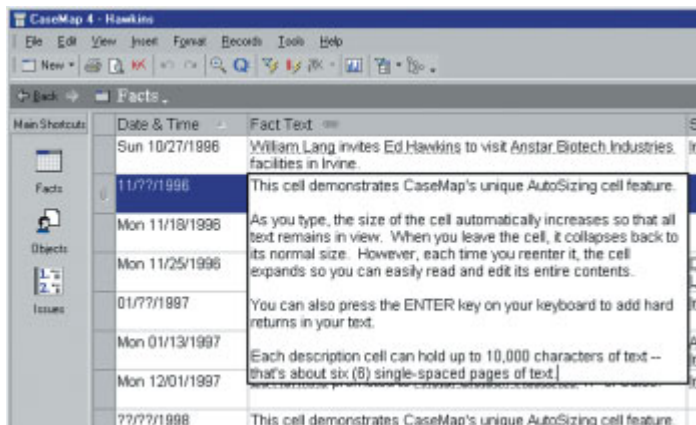
CaseMap 4's new AutoSizing cell feature at work.

In CaseMap 3 (as in all other database applications of which we're aware), you type in cells that have a fixed height and width. As a result, it's common to have some of the words you're typing scroll out of view when the text exceeds the visible space in a cell. In CaseMap 4, however, when you enter or edit a description cell, our new AutoSizing cells

automatically increase in size so all text remains in view where it can be easily read and edited.

We've also reworked CaseMap 4's description fields so you can use the ENTER key to place carriage returns in your text.

These new behaviors work not only in the many description type fields CaseMap automatically sets up when you create a new case, but also in any custom description fields you add to the database.

Issue Outline Enhancements

Each CaseMap file contains a spreadsheet for organizing your knowledge about case issues. Unique among all litigation support software tools, CaseMap lets you build an outline of case issues, not just a flat list. Your issue outline can be any number of levels deep.
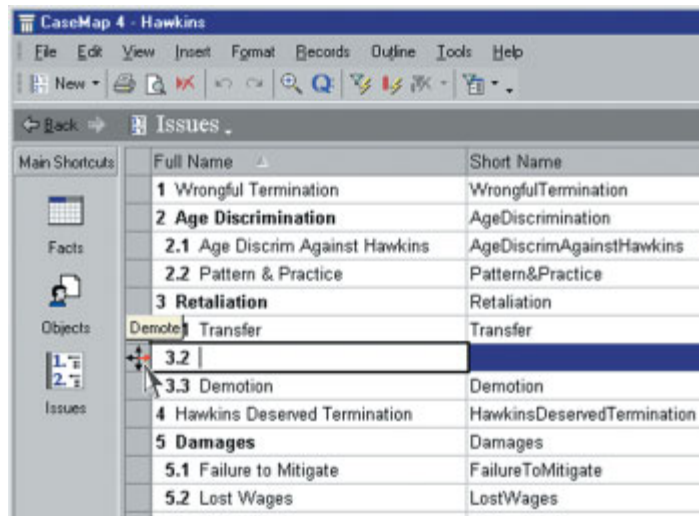
In CaseMap 4, you can insert issues directly into a desired location in the outline hierarchy. Also, you can promote, demote, and reposition issues using the compass tool that automatically appears to the left of the selected row.

In CaseMap 3, all issues were initially inserted at the bottom of the spreadsheet. You then clicked a series of arrow buttons to move the issue to the proper location in the outline structure. CaseMap 4 reduces this multi-step process to a single step. Issues can now be inserted directly into desired locations in the hierarchy.

Here's a second issue-related innovation in CaseMap 4: a new method to reposition issues in your outline. When you select an issue in CM4, a compass icon appears just to the left

of the row. Click the north, south, east, or west directional arrows to move the selected issue up, down, right, or left in the outline.

Search Feature Enhancements

CaseMap's already powerful searching capabilities have been further enhanced in Version 4.

One change relates to the count of facts, objects, etc., in a case file that always displays above the relevant spreadsheet. When you run filters, this display updates to indicate the percentage of items that remain in view out of the total in the case file. Simultaneously, the status bar at the bottom of the screen displays details regarding the nature of the search you're running.
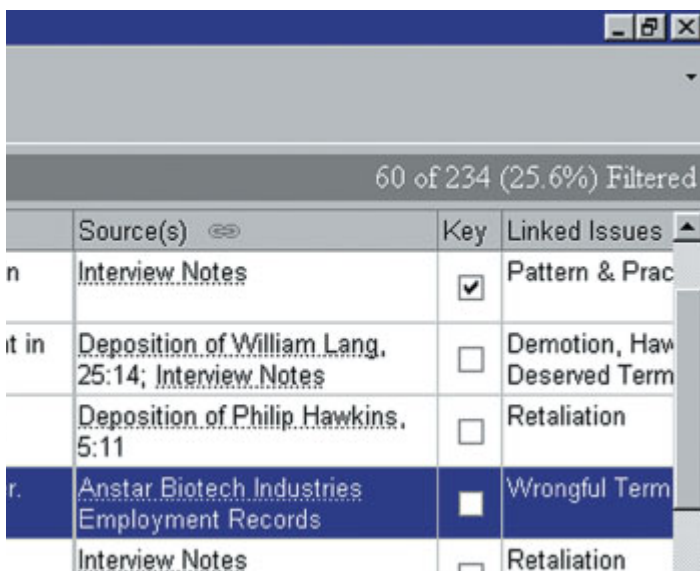

CaseMap 4 always displays an item count above your spreadsheets. When you run filters, the display updates to indicate the percentage of items that remain in view.

CaseMap 4 features an enhanced version of Instant Searching, filters and tags you run by right-clicking a value in a spreadsheet and choosing an option on the shortcut menu. Filtering limits the items in your spreadsheet to those that meet your criteria. Tagging marks items of interest with an icon, but leaves all spreadsheet rows in view.

We introduced Instant Searches in CaseMap 3, however, they could only be based on a single criterion. In CaseMap 4, you now can create Instant Searches based on two or more criteria, e.g., create an Instant Search that limits the facts in

view to those that are both undisputed and linked to a particular issue. To create an Instant Search based on multiple criteria, simply keep repeating the process of selecting a spreadsheet value on which you want to search. Click Filter By Selection or Tag by Selection on the shortcut menu. As you repeat the process, your spreadsheet updates to reflect the results of the new compound search.

Another enhancement to CaseMap 4's search features relates to filtering and tagging based on issue links. In CaseMap 4, when you filter your fact, object, question, or
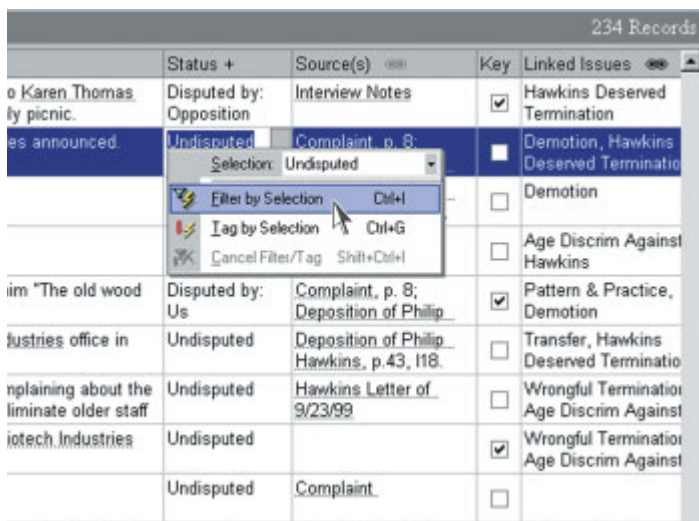
CaseMap 4 extends the innovative Instant Search features of CaseMap 3: Right-click in any field and you can run searches - even compound searches - on the fly.

research spreadsheet by the issues to which items are linked, CaseMap checks to see if the issue has child issues. If it does, you're asked whether you would like to include the subissues as part of the filter.

Adios, Data Refinery. Our redesign of CaseMap 4 means the Data Refinery tool found in CaseMap 3 is no longer needed to see the impact of your search or to create compound filters. As such, we decided to remove the Data Refinery "pipeline" graphic from CaseMap. We expect you'll use CaseMap 4's enhanced Instant Search feature to conduct the vast majority of your filtering and tagging. However, the full power of the Data Refinery remains available using CM4's Advanced Search dialog box.

Loads of Other Enhancements

There are dozens of other new features coming in CaseMap 4. Here are a few final examples.

Bates Numbering Shortcuts: CaseMap's new Bates Numbering features make it easy to build an index of critical case documents. When you enter a beginning Bates number, this value is automatically copied into the ending Bates number cell. If you want, you can increment the end Bates value using keyboard shortcuts or menu items instead of via typing. And when you create the next document record, there's a shortcut that causes CaseMap to generate the next beginning Bates number.
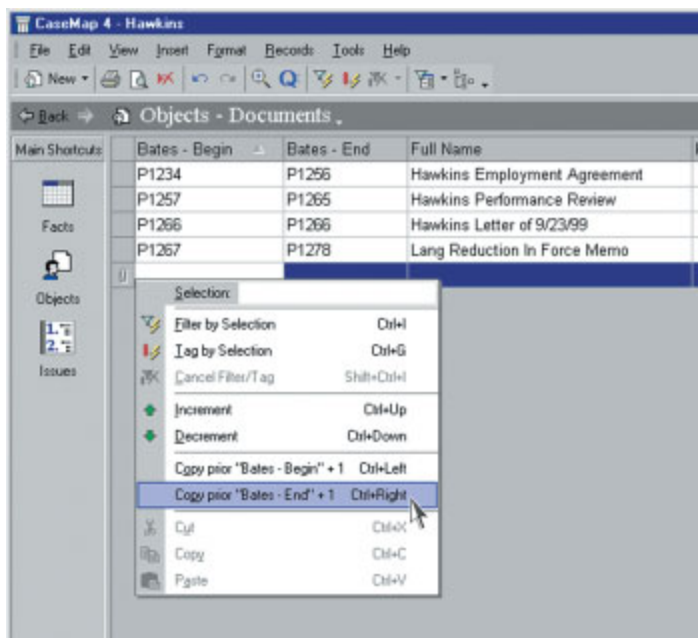

CaseMap 4's new Bates Numbering Shortcuts at work.

Analyze Values Function: CaseMap 4 makes it easy to sum up the data in numeric fields. To generate a sum (and get the average, minimum, and maximum value to boot), right-click a numeric field, and select Analyze Values on the shortcut menu. The statistics are based on the records that are in view when the analysis operation is performed. Thus, if you have a filter running, CaseMap only analyzes values for the records that remain in the spreadsheet after the filter is applied.

Customizable Display Font: In CaseMap 4, you can change the style and size of the font used to display case information on screen. If you wish, increase the font size to make your CaseMap info easier to read. Your screen font style and size are also now used when printing reports.

Linked File Indicator: When a record in CaseMap 4 is linked to one or more external files, a paper clip icon appears in the row header to make you aware of the links. Clicking the icon displays a list of the linked items and allows you to display any of interest.
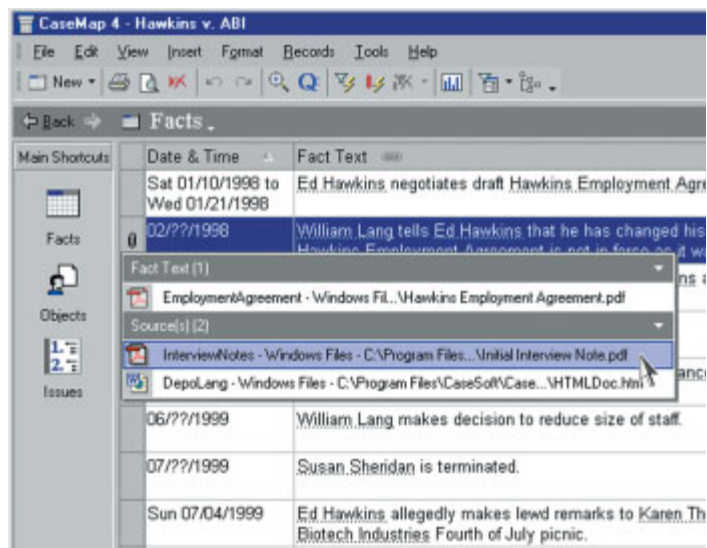
CaseMap 4's new Linked File Indicator at work.

Object Hinting: When you place your mouse pointer over a person, organization, or document that's mentioned in the fact you have selected, a hint appears displaying the player's Role in Case and other background information.
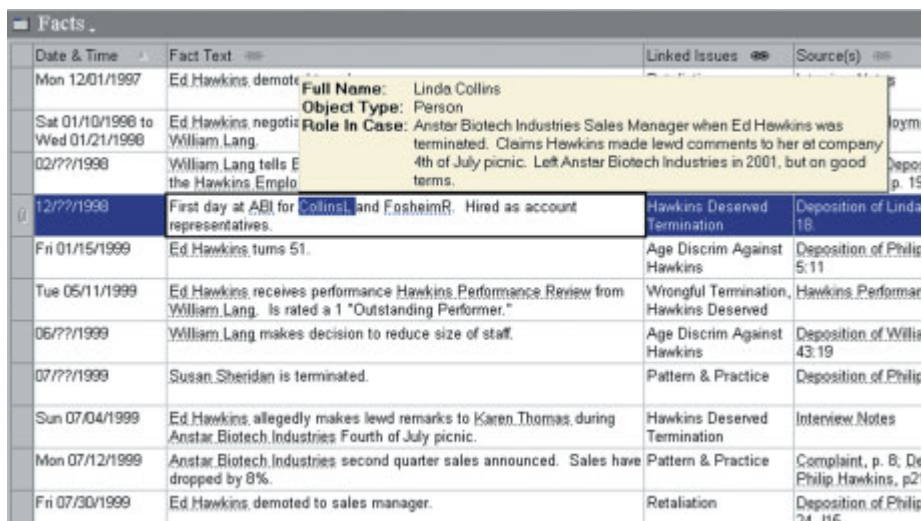
CaseMap 4's new Object Hinting at work.

CaseSoft Article Library

Available at www.casesoft.com

Getting Case Analysis Off to a Fast Start
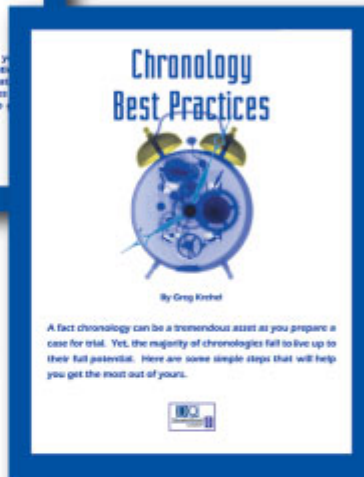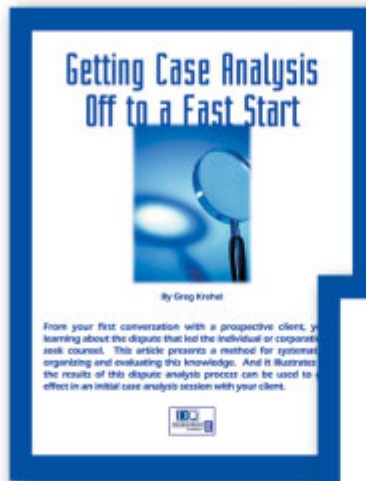
From your first conversation with a prospective client, you're learning about the dispute that led the individual or corporation to seek counsel. This article presents a method for systematically organizing and evaluating this knowledge.

Getting Case Analysis Off to a Fast Start

By Greg Krehel

From your first conversation with a prospective client, you're learning about the dispute that led the individual or corporation to seek counsel. This article presents a method for systematically organizing and evaluating this knowledge. And it illustrates the results of this dispute analysis process can be used to effect in an initial case analysis session with your client.

Chronology Best Practices

By Greg Krehel

A fact chronology can be a tremendous asset as you prepare a case for trial. Yet, the majority of chronologies fail to live up to their full potential. Here are some simple steps that will help you get the most out of yours.
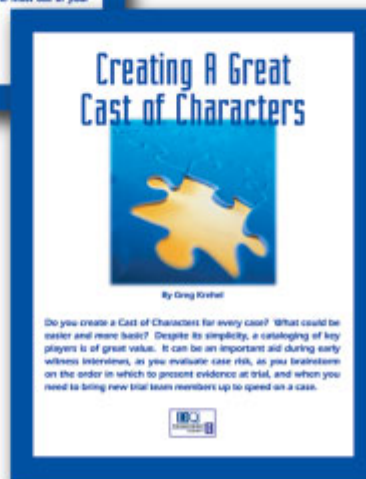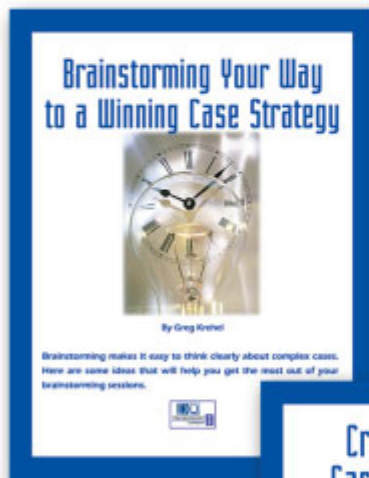
Chronology Best Practices

A fact chronology can be a tremendous asset as you prepare a case for trial. Yet, the majority of chronologies fail to live up tp their full potential. This article outlines some simple steps that will help you get the most out of your chronology.

Brainstorming Your Way to a Winning Case Strategy

Brainstorming sessions make it easy to think clearly about complex cases. This article offers some ideas that will help you get the most out of your brainstorming sessions.

Brainstorming Your Way to a Winning Case Strategy

By Greg Krehel

Brainstorming makes it easy to think clearly about complex cases. Here are some ideas that will help you get the most out of your brainstorming sessions.

Creating A Great Cast of Characters

By Greg Krehel

Do you create a Cast of Characters for every case? What could be easier and more basic? Despite its simplicity, a cataloging of key players is of great value. It can be an important aid during early witness interviews, as you evaluate case risk, as you brainstorm on the order in which to present evidence at trial, and when you need to bring new trial team members up to speed on a case.

Creating a Great Cast of Characters

Do you create a Cast of Characters for every case? What could be easier and more basic? Despite its simplicity, a cataloging of the key players is of great value. It can be an important aid during early witness interviews, as you evaluate case risk, as you brainstorm on the order in which to present evidence at trial, and when you need to bring new trial team members up to speed on a case.