

## User Guide

This user guide to Casemaker is designed to familiarize you with its different pages and provide instruction on how to use its various search capabilities, browsing features, organizing components and tools.

For more assistance in using Casemaker, live customer support is available Monday through Friday, 8 a.m. to 8 p.m. Eastern:  
Call: 1-877-659-0801 or  
Email: [Support@casemakerlegal.com](mailto:Support@casemakerlegal.com)

Clicking the Live Chat link from the navigation bar will allow you to talk with our customer support representatives on screen during our business hours.  
[See page 3.](#)

Need more help? Sign-up for a training webinar by clicking on “webinar” in the navigation panel. [See page 3.](#)

Casemaker supports the following browsers:  
[IE 8+](#), [Firefox F3+](#), [Safari4+](#), [Chrome 10.](#)

## Contents

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# Pages: The Home Page

The home page is where everything begins. Here you can type a new search into the search box, browse through the library, pull up recently viewed cases from your folders, or view your search and document history.

**Note:**  
*Texas members' home page is the Texas library.*

The home page consists of three sections:

## 1. The Search Bar

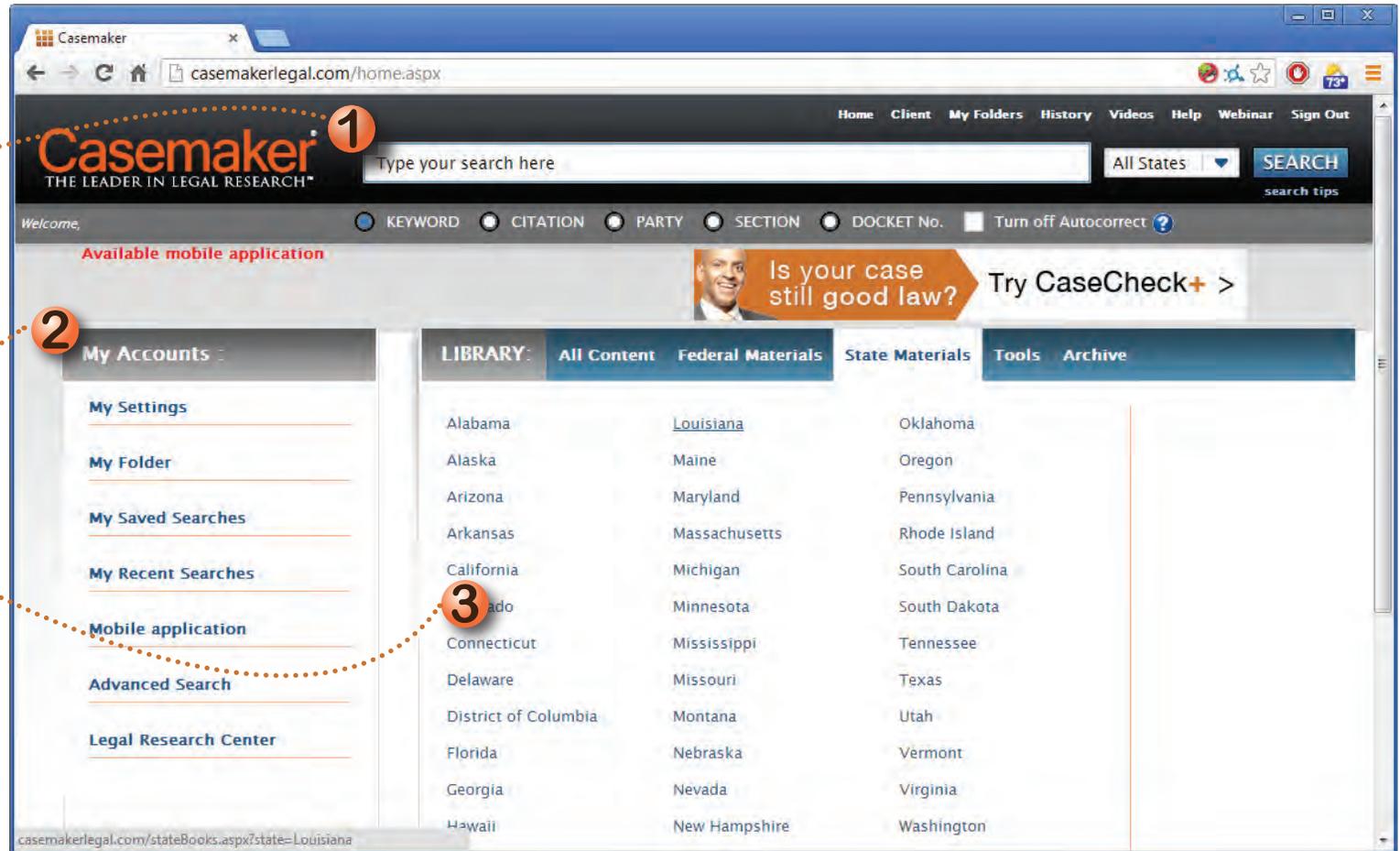
A state-of-the-art search engine makes creating a search simple and stress free. [Page 3](#)

## 2. My Accounts

Everything that makes Casemaker yours can be found right here. [Page 4](#)

## 3. The Library Browser

Just want to look through the database? The Library makes it easy. [Page 7](#)





## The Home Page: Search Bar

The search bar is a consistent part of Casemaker’s user interface and makes creating a new search, viewing search history, or accessing your folders at anytime during the research a simple process.

The search bar has 3 consistent features.

### 1. The Search Box

Create a search quickly in the search box. Just type in your search terms and click the search button. Advanced search options are shown below the search box to specify the type of search. Search by keyword, citation, party, section, or docket. Additional search options are located on the left side of the screen under “Advanced Search”.



Use the search tips under the search bar to be more specific in your search. This tool gives phrasing tricks that make your searches more productive. See [page 13](#) to see a list of these search tips.

#### Tip: Auto Correct

The Search box is equipped with auto correct capabilities for mistyped citations. E.G. If you put the citation 270ne2d46 in the search box, it will recognize the lacking spacing, punctuation, and capitalization citation and correct it to 270 N.E.2d 436. However, you must properly abbreviate your reporters. Casemaker goes by Blue Book citation guidelines for citation abbreviations.

You can turn this option *off* by selecting the checkbox.

**NOTE: You’ll notice that important features are added to the search bar throughout the search process to make organization faster and easier.**

### 2. A Jurisdiction Pop-Up Menu

Select a jurisdiction or any combination of jurisdictions to search by clicking the drop down arrow, pulling up the pop-up menu and checking the box or boxes that corresponds with your needs.

You will need to make a selection here with each search that is not in your default jurisdiction. To change this selection:

- Click on the pop-up menu.
- Check the box beside the state or states you want to search within.
- Then select whether you want to also search through “Selected Related Federal” Documents (U.S. Circuit and U.S. District cases)- or “All Federal” documents.
- Save your settings at the bottom of the window.

The federal library gives you the option to customize your search and you can choose individual libraries, you don’t have to search the whole library.



**NOTE: Our default setting for this is All States and Related Federal. You can change the default setting on your account to be the jurisdiction(s) of your choice, rather than All States and Related Federal using the My Settings link. To Change your default jurisdiction, see [page 4](#).**

### 3. A Navigation Panel

Located at the very top of the search bar, the navigation panel can return you to the home page, allow you to view your folders, check your history, get help, sign up for a free, live online webinar, and watch tutorial or product videos related to the New Casemaker. It will also display the name of the client you are currently working for.

For more about using folders, refer to [page 17](#).

To learn more about the “client” button see [page 20](#).

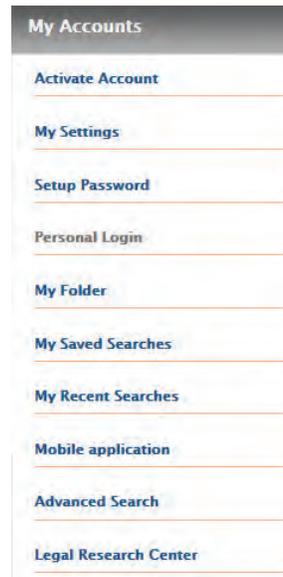


## [The Home Page: My Accounts.](#)

The “My Accounts” section of the homepage puts everything that makes Casemaker yours on the front page.

This includes important settings like:

1. My Settings
2. Password Creation
3. Personal Login
4. Folders
5. Saved Searches
6. Recent Searches
7. Advanced Search



From this section you’re able to easily set additional security measures, view custom folders, go back to recent and saved searches, or create an advanced search.

See [page 8](#) to learn how to save a search.

## [Password Creation:](#)

The new Casemaker system includes many features that allow you to personalize, save and organize your research. To protect your work, the new Casemaker allows you to create a password and security question to prevent unauthorized use of your personal information.

To do this, select “Setup Password” from the “My Accounts” section of the homepage. Set your password and security question then select “submit.”

***NOTE: Your personal information in Casemaker is never at risk, setting an additional password here is just an added security checkpoint.***



## Personal Settings

To change your default settings, choose "My Settings". This will bring you to the Default User Settings window.

To change the default search jurisdiction:

My Accounts : **Casemaker**  
THE LEADER IN LEGAL RESEARCH™

**My Settings**

**Default User Settings**

Search State:

Search Data Type:

Result Sort By:  Relevance  Date Decided  Most Cited

E-mail:

Print Option:  List of Items  Document

Document Format:  PDF  Word  Word Perfect

Page Layout:  Single Column  Dual Column

Changing default search library (cases, statutes, all books, etc.):

Click My Settings

Click Select Data Type button

Check corresponding boxes

Click OK.

**Select Book**

ALL BOOKS

Cases  Workers Compensation

Rules  Acts

Statutes  Law Review

Administrative Code  Jury Instructions

Attorney General Opinions  Constitution

Federal Court Rules  Ethics Opinion

Click My Settings

Click Select State button

Check corresponding boxes

Click OK.

**Select Jurisdiction**

ALL STATES  Select Related Federal

Alabama  Kentucky  North Dakota

Alaska  Louisiana  Ohio

Arizona  Maine  Oklahoma

Arkansas  Maryland  Oregon

California  Massachusetts  Pennsylvania

Colorado  Michigan  Rhode Island

Connecticut  Minnesota  South Carolina

Delaware  Mississippi  South Dakota

District of Columbia  Missouri  Tennessee

Florida  Montana  Texas

Georgia  Nebraska  Utah

Hawaii  Nevada  Vermont

Idaho  New Hampshire  Virginia

Illinois  New Jersey  Washington

Indiana  New Mexico  West Virginia

Iowa  New York  Wisconsin

Kansas  North Carolina  Wyoming

ALL FEDERAL

Bankruptcy Opinions  Public Laws

Board of Immigration Appeals  Supreme Court Opinions

Circuit Opinions  Tax Court

Code of Federal Regulations  United States Code

Constitution  Court of Appeals - Armed Forces

Court of Appeals - Veterans Claims  Internal Revenue Service

Court of Claims  Federal Register

Court of International Trade

District Court Opinions

Federal Court Rules

Federal Rules Decisions

Longshore and Harbor Workers Compensation

NTSB Decisions



Changing results sort option

Click My Settings

Choose radio button corresponding with choice of sort order

Click OK.

Enter your email address, primarily used for Emailing documents

Click My Settings

Enter E-Mail address

Click OK.

Change the Document format for emailing

Select the radio button corresponding to your choice of format

Choose preferred Page Layout

Click My Settings

Choose radio button corresponding with choice of layout.

**Casemaker**  
THE LEADER IN LEGAL RESEARCH™

**Default User Settings**

Search State:

Search Data Type:

Result Sort By:  Relevance  Date Decided  Most Cited

E-mail:

Print Option:  List of Items  Document

Document Format:  PDF  Word  Word Perfect

Page Layout:  Single Column  Dual Column

**IMPORTANT!**

***After making any changes in My Settings,  
be sure to click Save, then click Close.***



## The Home Page: Browse

On the Home Page is Casemaker's browsing component. It gives access to the database without requiring a search.

The library section is broken into three separate libraries:

1. All Content
2. Federal Materials
3. State Materials

Each of these three libraries contains core categories or "books" that can be selected and browsed.

See [page 9](#) to learn how to browse the library in more detail.

**NOTE:** You will always be able to narrow down the content in the browser. This means no matter how much the content is filtered, Casemaker will always have a result for you.

**1**

BROWSE: All Content Federal Materials State Materials **Tools** Archive

|                           |                     |                                |
|---------------------------|---------------------|--------------------------------|
| Administrative Codes      | Federal Court Rules | Title Standards                |
| Attorney General Opinions | Jury Instructions   | Workers Compensation Decisions |
| Bar Journals              | Law Reviews         |                                |
| Case Law                  | Legislative Acts    |                                |
| Constitutions             | State Court Rules   |                                |
| Ethics Opinions           | Statutes            |                                |

Click the tools tab to access Casemaker's subscription-based premium products. See [page 24](#) for more information about Casemaker's package of premium products: CasemakerPro and to learn how each tool works.

**2**

BROWSE: All Content Federal Materials **State Materials** Tools Archive

View Currency

|                                    |  |   |
|------------------------------------|--|---|
| Bankruptcy Opinions                | Court of Claims                              | IRS Revenue Rulings                       |
| Board of Immigration Appeals       | <a href="#">Court of International Trade</a> | Longshore and Harbor Workers Compensation |
| Circuit Opinions                   | District Court                               | NTSB Decisions                            |
| Code of Federal Regulations        | Federal Court Rules                          | Public Laws                               |
| Constitution                       | Federal Register                             | Supreme Court Opinions                    |
| Court of Appeals – Armed Forces    | Federal Rules Decisions                      | Tax Court                                 |
| Court of Appeals – Veterans Claims | United States Code                           |   |

**3**

BROWSE: All Content Federal Materials State Materials **Tools** Archive

|             |               |                |
|-------------|---------------|----------------|
| Alabama     | Louisiana     | Oklahoma       |
| Alaska      | Maine         | Oregon         |
| Arizona     | Maryland      | Pennsylvania   |
| Arkansas    | Massachusetts | Rhode Island   |
| California  | Michigan      | South Carolina |
| Colorado    | Minnesota     | South Dakota   |
| Connecticut | Mississippi   | Tennessee      |



## The Overview Page

This is the first page encountered after creating a search. It is broken into two columns:

### The Left Column

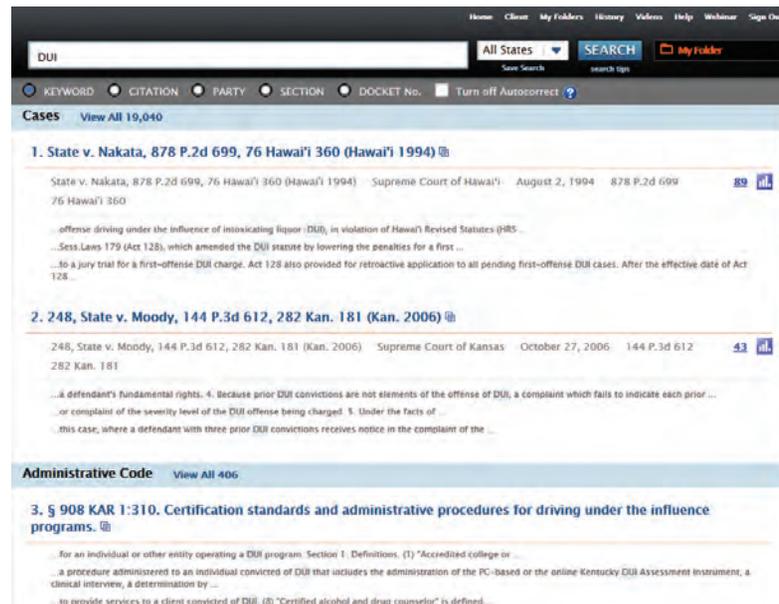
1. Results are categorized in books. They are listed by the number of pulled documents they contain for the search.
2. The numbers coincide with the number of documents retrieved in each book.



|                           |        |
|---------------------------|--------|
| Overview                  |        |
| Cases                     | 19,040 |
| Administrative Code       | 406    |
| Attorney General Opinions | 217    |
| Statutes                  | 206    |
| Acts                      | 51     |
| Rules                     | 38     |
| Jury Instructions         | 23     |
| Workers Compensation      | 21     |
| Law Review                | 17     |
| Ethics Opinion            | 11     |
| Constitution              | 2      |
| Federal Court Rules       | 2      |
| CaseKnowledge             | 10     |

**NOTE:** This column can be collapsed using the black tab to make more room for viewing results.

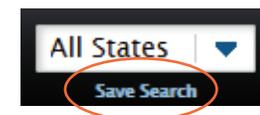
### The Right Column



The screenshot shows a search interface with a search bar containing 'DUI' and a dropdown menu set to 'All States'. Below the search bar are radio buttons for 'KEYWORD', 'CITATION', 'PARTY', 'SECTION', and 'DOCKET No.', along with a 'Turn off Autocorrect' link. The results are displayed in a list format under the heading 'Cases View All 19,040'. The first result is '1. State v. Nakata, 878 P.2d 699, 76 Hawai'i 360 (Hawai'i 1994)' with a document count of 89. The second result is '2. 248, State v. Moody, 144 P.3d 612, 282 Kan. 181 (Kan. 2006)' with a document count of 43. Below the results is an 'Administrative Code View All 406' section with a third result: '3. § 908 KAR 1:310. Certification standards and administrative procedures for driving under the influence programs.' with a document count of 43. Each result includes a snippet of text with search terms highlighted in blue.

1. Numbered results contain important information such as citation, court, date decided and party names.
2. Two results from each book.
3. Text excerpts below the title information display four contextually relevant occurrences of the search terms. These search terms are highlighted for easy recognition. Each library is a hyperlink and when click on these links, it will auto sorts by jurisdiction. You can unclick to go back.

**NOTE:** To save the search, click on "save search" below the jurisdiction drop-down. Even though a confirmation doesn't appear, your search is saved in the "saved searches" tab on the homepage.



## How To: Browsing The Library

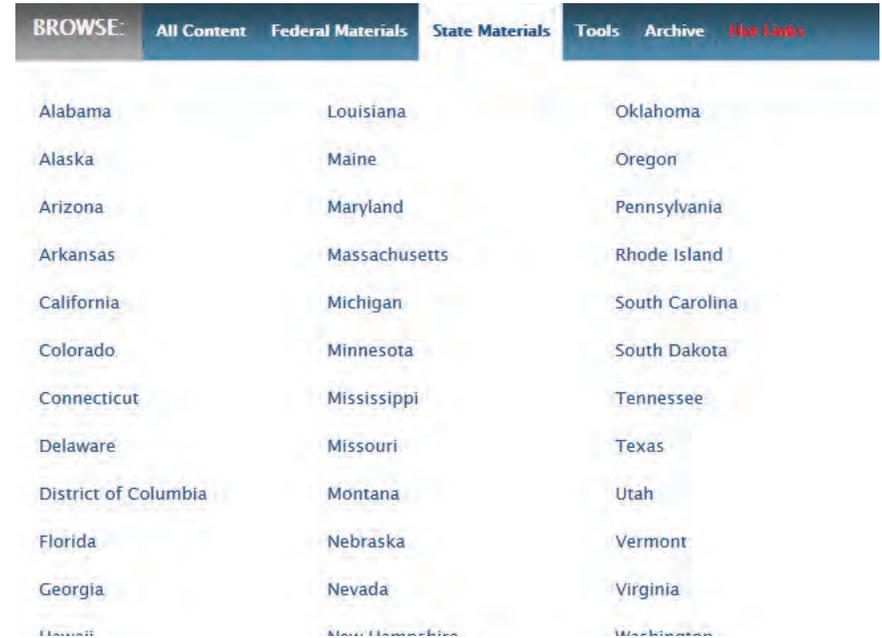
The library component allows a systematic browse of Casemaker's databases.

Before browsing, it is important to know that no matter how many selections you make, Casemaker will always have content to show you. This means that you will never be left with a blank screen.

As briefly described on [page 7](#), the library is broken down into similar core categories that you find in the jurisdiction pop-up tab on the search bar ([page 3](#)), or the overview page inside a search ([page 6](#)).

In the library, these core categories will be referred to as "books" and their subsequent subcategories as "sections."

We'll examine the process behind browsing the library by clicking on "State Materials" Here we'll pick Ohio. then look under the book titled "Revised Code" (or "Statutes" in most other states)."



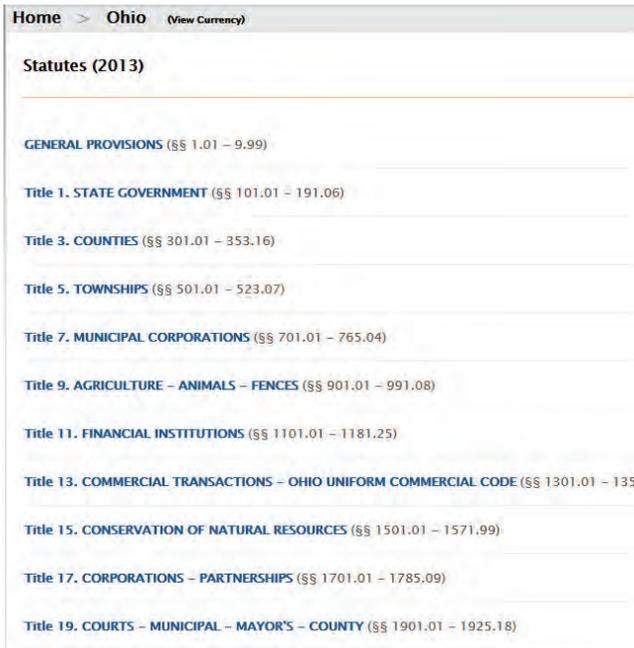
| BROWSE:              |                   |                 |
|----------------------|-------------------|-----------------|
| All Content          | Federal Materials | State Materials |
| Alabama              | Louisiana         | Oklahoma        |
| Alaska               | Maine             | Oregon          |
| Arizona              | Maryland          | Pennsylvania    |
| Arkansas             | Massachusetts     | Rhode Island    |
| California           | Michigan          | South Carolina  |
| Colorado             | Minnesota         | South Dakota    |
| Connecticut          | Mississippi       | Tennessee       |
| Delaware             | Missouri          | Texas           |
| District of Columbia | Montana           | Utah            |
| Florida              | Nebraska          | Vermont         |
| Georgia              | Nevada            | Virginia        |
| Hawaii               | New Hampshire     | Washington      |



## How To: Browsing The Library (Continued)

We are now at the first level of content.

Here we find that Casemaker provides a “bread-crumbs” trail to show us the section and the book we are currently viewing.



Home > Ohio (View Currency)

Statutes (2013)

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GENERAL PROVISIONS (§§ 1.01 – 9.99)

Title 1. STATE GOVERNMENT (§§ 101.01 – 191.06)

Title 3. COUNTIES (§§ 301.01 – 353.16)

Title 5. TOWNSHIPS (§§ 501.01 – 523.07)

Title 7. MUNICIPAL CORPORATIONS (§§ 701.01 – 765.04)

Title 9. AGRICULTURE – ANIMALS – FENCES (§§ 901.01 – 991.08)

Title 11. FINANCIAL INSTITUTIONS (§§ 1101.01 – 1181.25)

Title 13. COMMERCIAL TRANSACTIONS – OHIO UNIFORM COMMERCIAL CODE (§§ 1301.01 – 135)

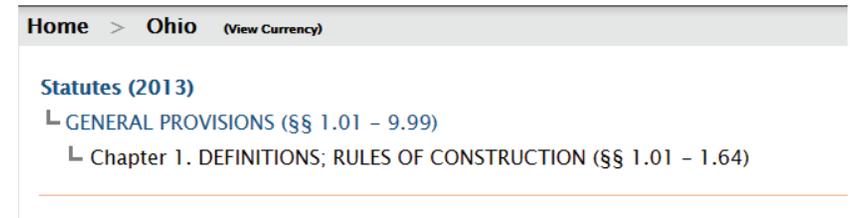
Title 15. CONSERVATION OF NATURAL RESOURCES (§§ 1501.01 – 1571.99)

Title 17. CORPORATIONS – PARTNERSHIPS (§§ 1701.01 – 1785.09)

Title 19. COURTS – MUNICIPAL – MAYOR'S – COUNTY (§§ 1901.01 – 1925.18)

Next, we have the “table of contents” for the Ohio Statutes. Click on a title to see its content.

The “bread-crumbs” trail now appears both above the search box as before, and below the state name.



Home > Ohio (View Currency)

Statutes (2013)

- GENERAL PROVISIONS (§§ 1.01 – 9.99)
  - Chapter 1. DEFINITIONS; RULES OF CONSTRUCTION (§§ 1.01 – 1.64)



Casemaker THE LEADER IN LEGAL RESEARCH™

All Content Ohio Revised Code

Welcome, franklin@lawriter.net Document Archive (3) SuperCode (0) Browse TOC **Annotator (2)**

Citing References (2) 1 - 2

The statute Annotator provides links to cases and all other Casemaker data that cite a statute that a user is viewing. Casemaker’s statute Annotator is built with editorial involvement to identify the many varying patterns that are used to refer to particular statutes.



## Results Page

The results page displays the content of a single book selected from the overview page.

The layout is similar to the previous page, but with added features.

### The Left Column

Allows you to:

1. To conduct a search within the results e.g. To run a search for only the cases involving behavior type "behavior" into the "Search Within Results" box or, if you want to filter the results to coincide with a certain date, use the Date Decided box.

2. Keep track of where you are in a search and return to a previous book by selecting the check box again.

Unchecking the box will return you to the Overview page, rather than returning to a previous book by selecting the check box again.

3. Apply filters to the results simply by checking the box next to any one of the facets on the left.



The "thumbs up" icons coincide with how the case was viewed by later courts. This is a subscription based premium product called "CaseCheck+". See [page 24](#) to learn more about this and other premium products.



**Icons** (from left to right):

1. The page icon eliminates text excerpts from the titles.
2. The printer icon will send the selected results to print.
3. The mail icon will email the selected results directly to a personal email.
4. The folders icon saves the selected results directly to a folder.
5. The floppy disk icon downloads the selected results to your hard drive.

### The Right Column

1. Choose how you want the results to be displayed with the "sort by" drop down menu.

You can sort by:

- Relevance (default)
- Date Decided
- Most Cited
- State (ascending)
- State (descending)

To permanently change the default sort, refer to [Page 4](#).

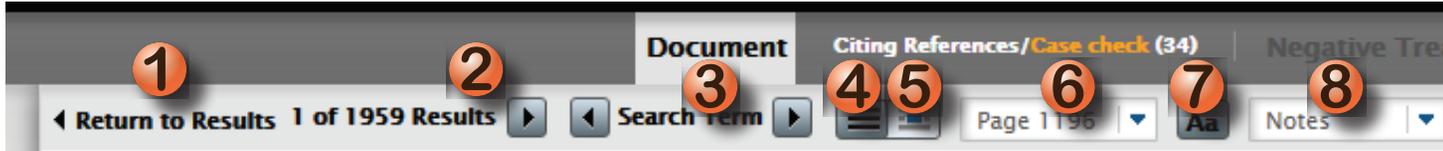
2. Shows the number of times the case has been cited in the whole database.

3. The graph icon will plot the number of times a case has been cited over the years on a line graph.



## The Document Page

The Document page contains features that help you determine a document's importance to your case and organize any useful information. The tool bar gives you access to all these features.



### The Tool Bar

1. Return to the results page at any time.
2. Move through multiple documents without leaving the document page.
3. Jump to the place where your search term appears.
4. View Full Document (default setting)
5. View paragraphs with search hits.
6. Jump to a specific page within the document.
7. Font resize. Enlarges the font.
8. Post notes to the document. The Notes feature allows you to write comments and post them directly to the document that is being viewed. See [page 18](#) to learn how.



Citing References: Formerly known as CaseCheck in Casemaker 2.2, Citing References is able to display the cases that cite the selected case. You need to click this tab to see the results.

Negative Treatment: Negative treatment is part of the functionality for CaseCheck+ subscribers. To learn more about this tool see [page 24](#).



The icons are consistent with those of the previous page. Here you are able to:

1. Print
2. Email
3. Save to a folder
4. And download the document that is being viewed.



## How To: Run a Search from Scratch

Note: Since the search bar is a consistent component of the interface, a search can be run from any page inside Casemaker.

## Set the Search Parameters

If you're logging into Casemaker for the first time, you will need to select options under "My Settings" on the home page. Once set, Casemaker will remember the selection for your next visit. See [page 5](#) to change your default Settings.

If you would like to conduct a one-time search with a different jurisdiction, click on the jurisdiction arrow located on the search bar and select the desired state(s). Be sure to save the selection(s) at the bottom right of the window by clicking SAVE. This selection will only be saved for your current search and will resort back to your selection under "My Settings".

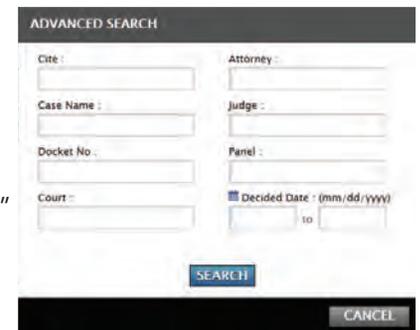
**NOTE: once a state is selected, the default for federal materials is "Select Related Federal." This means that the results from the search will include related U.S. Circuit and U.S. District cases. Unselect this option if it is not desired.**

## Set the type of search



Click on the type of search you want to create under the search bar. You can search by keyword, citation, party, section, or docket number.

You can also click on "Advanced Search" on the left side of the screen.



## Create a Search

Once the search type is set, create the search in the search box.

**NOTE: The quality of your results is not inhibited by your ability to provide proper punctuation in a citation. Auto Correct is built into the search box so you always get good results. For best results, use Blue Book citation guidelines.**

| Search Type | Example                               | Result  |
|-------------|---------------------------------------|---|
| AND         | contract binding                      | Finds documents with both "contract" and "binding".   |
| OR          | alimony OR support                    | Finds documents with either "alimony" or "support".   |
| NOT         | property NOT commercial               | Finds documents that have "property" but not "commercial". NOT requires there to be more than one term of phrase. |
| Grouping    | (alimony OR support) AND divorce      | Finds documents that must have the word "divorce" and may have either "alimony" or "support".                     |
| Phrase      | "right of way"                        | Finds documents with the phrase "right of way".   |
| Thesaurus   | --parole                              | Finds documents that include "parole" AND/OR any synonyms for "parole".   |
| Proximity   | tax /10 property<br>tax w/10 property | Finds documents that have the words "tax" and "property" within 10 words of each other.                           |
| Asterisk    | run*                                  | Finds documents that have "run", "runs", "runner", etc.   |



Use the "Search Tips" button directly under the search button to find specific phrasing to maximize the search relevancy. See [page 14](#) for a full list of search tips.



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## Search Tips Expanded:

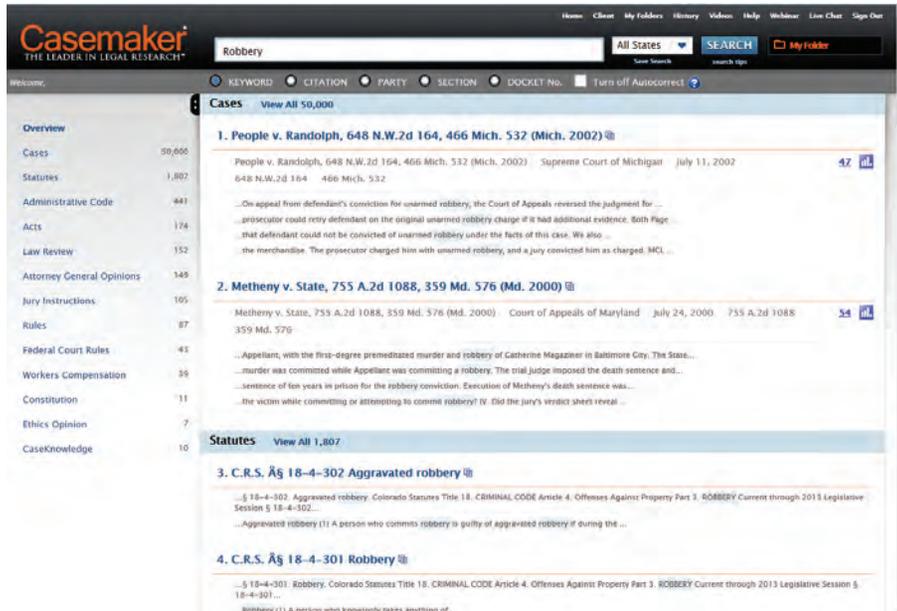
| <b>Search Type</b> | <b>Example</b>                        | <b>Result</b>   |
|--------------------|---------------------------------------|---|
| AND                | contract binding                      | Finds documents with both "contract" and "binding".   |
| OR                 | alimony OR support                    | Finds documents with either "alimony" or "support".   |
| NOT                | property NOT commercial               | Finds documents that have "property" but not "commercial", NOT requires there to be more than one term of phrase. |
| Grouping           | (alimony OR support) AND divorce      | Finds documents that must have the word "divorce" and may have either "alimony" or "support".                     |
| Phrase             | "right of way"                        | Finds documents with the phrase "right of way".   |
| Thesaurus          | ~ parole                              | Finds documents that include 'parole' AND/OR any synonyms for 'parole'.   |
| Proximity          | tax /10 property<br>tax w/10 property | Finds documents that have the words "tax" and "property" with 10 words of each other.                             |
| Asterisk           | run*                                  | Finds documents that have "run", "runs", "runner", etc.   |



## How To: Run a Search from Scratch (continued)

### View Search Results on the Overview Page

The overview page displays the two most relevant results for each core library in the database. To make things easier, a list of the libraries is shown on the left side.



1. Scroll down the page to get a feel for the content.
2. Click on a document's title to open the document page.
3. Select a book from the left to look deeper into its content.

### View Results on the Categories Page

The categories page displays the content of a single book.

### On the Categories Page Under "Cases":

1. Locate the thumbs up or down icon to see how the document was viewed by later courts.

*Note: Icons are a part of CasemakerPRO, sold separately unless your Bar has it included in your Casemaker Access.*



2. Select a document to view by clicking on its title.
3. Narrow the results further by adding a filter from the left column. To do so: type the information into the appropriate filter box and click "GO."



Filters are:

1. Search Within Results
2. Jurisdiction (if searching more than one state)
3. Courts
4. Cite
5. Docket Number
6. Case Name
7. Judge
8. Attorney
9. Date Decided

4. Narrow the results further by searching within the results. For example, type "guilty" into the "search within results" box to add it as a keyword.

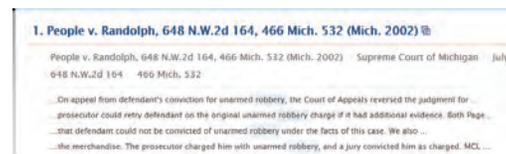


## How To: Run a Search from Scratch (continued)

### On the Categories Page Under “Statutes”:

Cool Feature: While searching through “Statutes” there is a simple way to go into a browse mode and view all the statutes related to the one you’ve found during your search. Here’s how:

1. Select the Statute you wish to look under from either the Overview page or the categories page. This will take you to that statute’s document page.

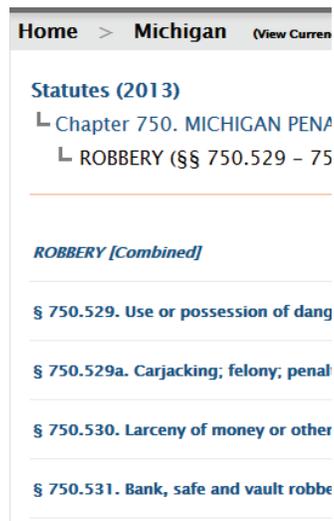


**Note: When viewing a statute, easily access any archived version of the statute by clicking on the “archive” tab.**

2. Click on “Browse TOC” on the tool bar.



3. You’ll be directed to the Statutes’ browse page:



4. To return to your previous location on the selected Statutes’ document page, simply click the “back” button on your browser.

## View the Document

After running a search and filtering through the results, hopefully you’ve found what you’re looking for. If not, add more filters to your results. If so, to view a document, click on its title. This will bring you to the document page.

The document page provides some of the best features Casemaker has to offer.



Here you can:

1. See if the case has been cited in other cases.
2. Skip to specific pages of the case.
3. Create and post notes directly to the case.
4. If you want to do something specific with the case, the document page has icons on the right side of the window that allow you to:
  - A. Print
  - B. Email
  - C. Save to a folder
  - D. Download the document that is being viewed

**NOTE: When viewing a statute, easily access any archived version of the statute by clicking on the “archive” tab. Casemaker’s SuperCode feature keeps the U.S. Code and the CFR current. Click the SuperCode tab when looking at any statute or regulation to see any newly-enacted U.S. Public Law or newly-adopted regulation that affects the statute or regulation that you are viewing.**



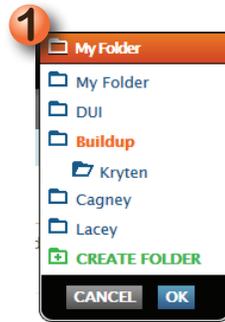
# How To: Organizing Your Research Using Folders

Using a personalized folder makes it easier to revisit the most relevant content of your case.

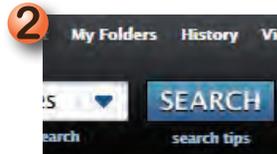
## Making a Personalized Folder

In order to use a folder, it must be created. This can be done one of two ways.

1. The easiest way to create a folder is by using the drop down menu on the search bar.
  - a. Click on "Create Folder"
  - b. Type a name into the box that appears
  - c. Click "OK."



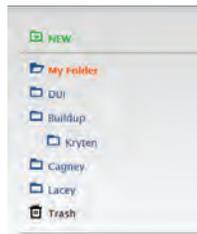
2. Another way to create a folder is by entering the folders main page.
  - a. Click "My Folders" on the navigation panel to get to the folders main page
  - b. Click on "New"
  - c. Type a name into the box that appears
  - d. Click "OK."



## Selecting Your Folder

Once you have created your folder. Make it easily accessible by selecting it with the drop down menu on the search bar.

- a. Click on the tab.
- b. Click on your folder.
- c. Click "OK."



Now it can be used to organize content while inside the database.

## To Save a Single Document to Your Folder

1. Make sure your folder is selected.
2. Click, drag and drop the document's title into the folder OR while in the document, use the icon in the dark grey toolbar to save.



## To Save Multiple Documents Simultaneously

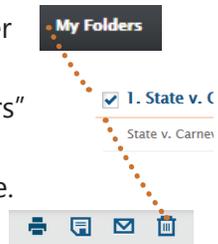
1. Check the boxes beside the title of the document.
2. Select the Folder icon directly below the folders drop down tab.
3. Select which folder to save to.
4. Click save.



## To Delete Documents From Your Folder

You can delete selected documents from your folder at any time.

1. Enter the folders main page using the "My Folders" button on the navigation panel.
2. Check the box beside the titles you wish to delete.
3. Click the trash can icon below the search bar.
4. A warning will ask for confirmation. Hit "OK."



## To Delete an Entire Folder

1. Enter the folders main page using the "My Folders" button on the navigation panel.
2. Select the folder you wish to delete.
3. Open the "options" drop down tab.
4. Select "delete."

## CAUTION

Deleting a folder will delete all of its content as well.

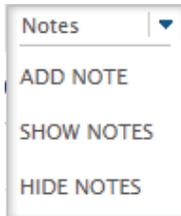


# How To: Create, Post, Hide, Delete and Print Notes

Posting notes directly to a document nearly eliminates the back and forth between Casemaker and a word processor.

In order to do anything with notes, you must be viewing a document. See [page 9](#) if you want to make sure you're in the right place.

## To Create a Note



1. Select the "Notes" drop down tab from the tool bar on the document's page.

2. Click "Add Note"

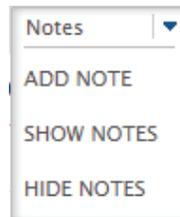
3. Write your note in the pop up window



The pop up window can contain a maximum of 255 characters. The counter on the bottom of the window counts the number of characters in the note. If the counter turns red, the note has exceeded the maximum number and the note will not save. However, you can add as many notes as you need to any document - we do not put a limit on this.

4. Save your note. NOTE: Once you save your note, it will appear below the document title.

## To Hide a Posted Note



1. Select the "Notes" drop down tab from the tool bar on the document's page.

2. Click "Hide Notes"

## To Edit a Posted Note

1. Click on the pencil icon located on the far right of the note.



2. Make the edit on the pop up window that appears.

3. Save the change by clicking on the "Save" button at the bottom of the window.

## To Delete a Posted Note

1. Click on the "x" icon located next to the pen icon on the far right of the note.



2. A warning message will ask for a confirmation. Click "OK."

**Caution: Deleting a note is a permanent action. Once you delete, you cannot get it back.**

## Printing the document with notes

Note: When printing a document with your notes, the notes will appear at the end of the document.

See [page 21](#) to learn how to include your notes when printing.



## How To: The History

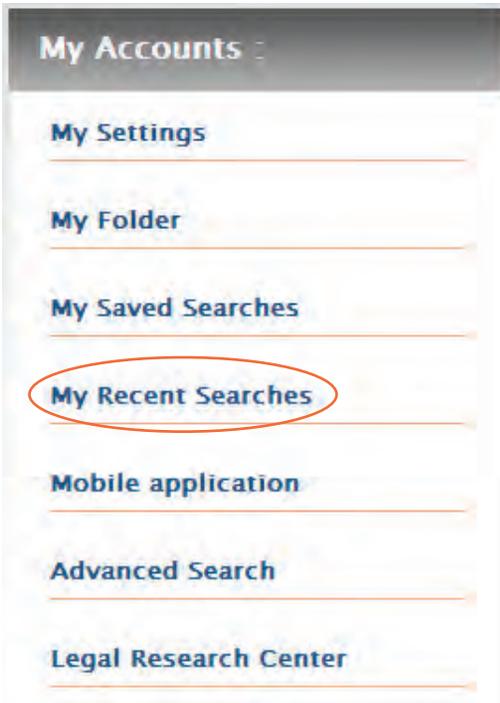
The history feature automatically keeps track of your most recently run searches and viewed documents.

There are a few ways to access the history.

1. Click the "History" button on the navigation panel.



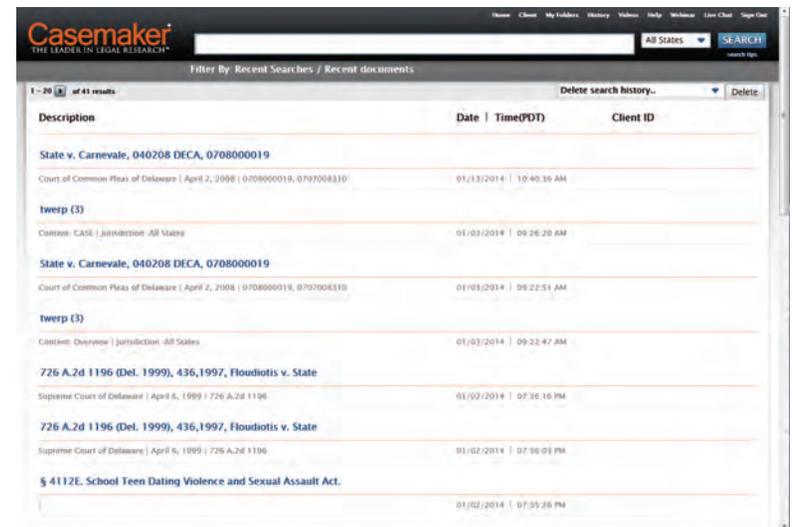
2. Or, access recent searches directly from the "My Accounts" section of the homepage.



Under the "history" button on the navigation panel, the history is organized into two categories.

1. Recent Searches
2. Recent Documents

Filter By: Recent Searches / Recent documents



The screenshot shows the Casemaker search results page. The page is titled 'Filter By: Recent Searches / Recent documents'. It displays a table of search results with columns for Description, Date | Time(PT), and Client ID. The results are organized into sections: 'State v. Carnevale, 040208 DECA, 0708000019', 'tweep (3)', and '726 A.2d 1196 (Del. 1999), 436,1997, Floudiotis v. State'. Each section contains a list of search results with their respective dates and times.

| Description  | Date   Time(PT)          | Client ID |
|--|--------------------------|-----------|
| State v. Carnevale, 040208 DECA, 0708000019                                |                          |           |
| Court of Common Pleas of Delaware   April 2, 2008   0708000019, 0707008310 | 01/13/2014   10:40:30 AM |           |
| tweep (3)  |                          |           |
| Content: CASE   Jurisdiction: All States                                   | 01/03/2014   09:26:20 AM |           |
| State v. Carnevale, 040208 DECA, 0708000019                                |                          |           |
| Court of Common Pleas of Delaware   April 2, 2008   0708000019, 0707008310 | 01/03/2014   09:22:51 AM |           |
| tweep (3)  |                          |           |
| Content: Overview   Jurisdiction: All States                               | 01/03/2014   09:22:47 AM |           |
| 726 A.2d 1196 (Del. 1999), 436,1997, Floudiotis v. State                   |                          |           |
| Supreme Court of Delaware   April 5, 1999   726 A.2d 1196                  | 01/02/2014   07:36:16 PM |           |
| 726 A.2d 1196 (Del. 1999), 436,1997, Floudiotis v. State                   |                          |           |
| Supreme Court of Delaware   April 5, 1999   726 A.2d 1196                  | 01/02/2014   07:36:03 PM |           |
| § 4112E. School Teen Dating Violence and Sexual Assault Act.               |                          |           |
|  | 01/02/2014   07:35:26 PM |           |

Both pages carry a similar design which contains the description of the case viewed or the search that was created, while also giving the date, the time, and the Client ID -if a client was selected before creating the search.



## How To: Set a Client

If you are working for a specific client, the client feature is a convenient way of keeping track of the hours spent, searches made, and documents viewed for that client. Each time you log into Casemaker, you will have to set the client if you want Casemaker to keep track. This is simple to do.

### Setting up a client

1. Click on "Client" on the navigation panel of the search bar.

If you already have clients added, click on the drop down menu under the term "Client Name" and select the client. Then, click continue.

2. If you do not have any clients added or would like to add a new client, click "Add," enter the client name in the pop up, and click "OK."



The screenshot shows the Casemaker interface for setting a client. It features a 'Client Name' dropdown menu with 'Johnny D Doe' selected, and a 'Matter Number' dropdown menu with '234' selected. There are 'ADD' and 'REMOVE' buttons for each dropdown, and a 'CONTINUE' button at the bottom.

3. Set a unique "Matter Number." This allows you to work on more than one case for a specific client, without having to enter a different name.

4. Once the two fields are filled, click "Continue" and you will be returned to the home page.

Once you have selected a client, the client's name will appear on the navigation panel in place of "Client." From this point on, Casemaker will keep track of the time you spend under that client.



The screenshot shows the 'Session Summary' page in Casemaker. It includes a 'Session Summary' section with a date and time, and a table of events. The table has columns for 'Event', 'Description', 'Date/Time(PDT)', and 'Client'. The client name 'Johnny D Doe' is visible in the Client column.

| Event         | Description   | Date/Time(PDT)           | Client       |
|---------------|---|--------------------------|--------------|
| Search        | larceny (275)<br>Content Overview   Jurisdiction: AZ  | 02/06/2014   08:46:53 PM | Johnny D Doe |
| Document View | 89 P. 415 (Ariz. 1907), Crim. 229, <i>Bufteh v. Territory of Arizona</i><br>Supreme Court of Arizona   March 22, 1907   89 P. 415, 11 Ariz. 185 | 02/06/2014   08:47:02 PM | Johnny D Doe |

**Note: On the History page, you can sort the search history by client by clicking on the up (ascending) and down (descending) arrows next to the Client ID.**



The screenshot shows the search history page in Casemaker. It features a table with columns for 'Description', 'Date', 'Time(PDT)', and 'Client ID'. The 'Client ID' column has up and down arrows for sorting. The table contains several search results, including '89 P. 415 (Ariz. 1907), Crim. 229, *Bufteh v. Territory of Arizona*' and 'larceny (275)'.

| Description   | Date       | Time(PDT)   | Client ID ↑ ↓ |
|---|------------|-------------|---------------|
| 89 P. 415 (Ariz. 1907), Crim. 229, <i>Bufteh v. Territory of Arizona</i><br>Supreme Court of Arizona   March 22, 1907   89 P. 415, 11 Ariz. 185 | 02/06/2014 | 08:47:02 PM | Johnny D Doe  |
| larceny (275)<br>Content Overview   Jurisdiction: AZ  | 02/06/2014 | 08:46:53 PM | Johnny D Doe  |
| 648 N.W.2d 164 (Mich. 2002), 117750, <i>People v. Randolph</i><br>Supreme Court of Michigan   July 11, 2002   648 N.W.2d 164, 466 Mich. 532     | 01/19/2014 | 11:46:42 AM |               |
| State v. Carnevale, 040208 DECA, 0708000019<br>Court of Common Pleas of Delaware   April 2, 2008   0708000019, 0707008310                       | 01/13/2014 | 11:27:31 AM |               |
| State v. Carnevale, 040208 DECA, 0708000019   |            |             |               |

When you have finished working for a selected client and want to view the report of hours worked, you will need to sign out of Casemaker. The report will come up after you have signed out and will offer the option to print the report, sign back into Casemaker, which takes you back to your state bar's website. (This feature is not available for Texas Bar users.)



## How To: Print a Document

You'll find the print icon directly underneath the folder drop down tab at the top right on both the "categories" and "document" pages.



**NOTE: While the icons are the same on both pages, the print options vary depending on the page being viewed.**

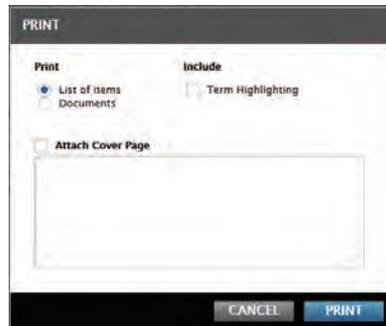
### From the categories page

On the "categories" page (when viewing the search results listing) clicking the print icon brings up a pop up window with a few specific options for these pages:

1. "List of items" will print a list of the documents as they appear on the screen.

2. "Documents" will print each document in the list in the order that they appear.

3. Under the "options" tab, you're able to include "Term Highlighting".\*  
\*With this option selected, the list of items or documents being printed will print with the search terms highlighted.



**NOTE: No matter where the print options are being viewed, there's always an option to print a cover page with personalized comments.**

## From the Document Page

Your Print options will automatically appear as you selected in "My Settings" as described on [page 6](#) You can change these settings any time.

The print icon on the document page allows you to select a desired format for printing. There are three formats to choose from:

1. PDF
2. Word
3. Word Perfect

### Other print options on this page include:

"Page Layout" allows you to choose between single or dual column layout on the printed page.

"Notes" will print the document with any posted notes.

"Content to Append" will add to the document any relevant material to the selected document.

After selecting from the options, click "print" to print the document.



#### Page Layout

- Single Column Layout  
 Dual Column Layout

#### Include

- Citing References  
 Negative Treatment

**Note: the "Term Highlighting" option is not available when printing as a "Dual Column" layout.**



## How To: Email a Document

The email icon is present on the “categories” and “document” pages and is always situated next to the print icon.



**NOTE: Email options differ depending on the page being viewed.**

### Emailing from the categories page

When viewing the listing of results clicking the email icon, will give you these options:

Attach:

1. List of items (a list of selected results\* listed on the page being viewed and their title information).
2. Documents (the documents selected will be emailed in their entirety).

\*Select the results you would like to email by clicking on the appropriate check boxes next to the result (see below).



## Email options on the Document Page

Once you’re viewing a specific document on the document page, the email options change to reflect the change in the content of the document being sent. Among other options, the document page’s email dialog box includes: a dual column layout of the document, a cover page, personal notes, etc.

**NOTE: The sent email from the document page will contain an attachment of that specific document with any of the criteria you set in the “options” dialog box.**



## How To: Download a Document

The download icon is present on the “categories” and “document” pages and is always situated next to the print icon.



**NOTE: Download options differ depending on the page being viewed.**

### Downloading from the categories page

When viewing the listing of results clicking the download icon, will give you these options:

Attach:

1. List of items (a list of selected results\* listed on the page being viewed and their title information).

2. Documents (the documents selected will be downloaded in thier entirety).

\*Select the results you would like to download by clicking on the appropriate check boxes next to the result (see below).

3. N.L.R.B. v. Max Factor and Co., 640 F.2d 197 (9th Cir. 1980)

N.L.R.B. v. Max Factor and Co., 640 F.2d 197 (9th Cir. 1980) United States Court of Appeals, Ninth Circuit September 9, 1980 16

## Download options on the Document Page

Once you’re viewing a specific document on the document page, the download options change to reflect the change in the content of the document being sent. Among other options, the document page’s email dialog box includes: a dual column layout of the download, a cover page, personal notes, etc.

**NOTE: The downloaded file from the document page will include any of the criteria you set in the “options” dialog box.**



## CasemakerPRO

CasemakerPro is a package of premium products designed to enhance Casemaker's capabilities, as well as provide new services to the user.

This package is subscription based and does not come built into Casemaker unless your Bar has purchased them and made it part of the Casemaker package available to you.

## How the Tools Work

### 1. CaseCheck+/ Negative Treatment

CaseCheck+ works like Shepherd's® and KeyCite® at a fraction of the cost.

CaseCheck+ validates your research and identifies whether or not your case law citations are still good law. CaseCheck+ returns negative treatments instantly as you research. Link to negative treatments and quickly review the citation history for both state and federal cases.

It works so well with the interface that it doesn't require extra steps in order to use.

**1** After making a search, look for the thumbs up or thumbs down icons on the left side of the case citation.

**2** A thumbs up means that the case is good law.

**2. State v. Jones, 961**

 State v. Jones, 961 A.2d

**3** A thumbs down means it was viewed negatively by a later court.

**1. Territory of Hawaii**

 Territory of Hawaii v. Scl

If a case has had negative treatment, when you enter the document page, the details of the treatment will be shown at the very top of the document.



The screenshot shows a search results page for "McLane v. Territory of Arizona, 71 P. 938, 8 Ariz. 150 (Ariz. 1903)". The interface includes a search bar, navigation buttons, and a list of results. The first result is highlighted, showing a red flag icon and the text "Questioned 425 P.2d 850 (Ariz.App. 1967), 1 CA-CR 83, State v. Kelly". Below the search results, there are three tabs: "Document", "Citing References/Case check (0)", and "Negative Treatment (1)".

You can click on the Negative Treatment tab for more information.

Negative treatment includes:

- **Criticized** - This keyword is used between two same state appellate courts or between two different circuit courts, when one is not agreeing with the conclusion of the other
- **Granted** - The citing case grants further appeal in the cited case.
- **Modified** - The higher court modifies or brings certain changes in the lower court's decision or the lower court brings certain changes in its prior opinion. However, that may affect change in judgment or not.
- **Overruled** - The citing case explicitly overrules or disapproves the cited case.
- **Overruled in part** - The citing case explicitly overrules or disapproves some portion of the cited case.
- **Questioned** - The citing case determines that the cited case lacks continuing validity and thus can no longer be relied upon.
- **Reversed** - The higher court overturns the judgment of the lower court based on legal issues.
- **Superseded** - When a statute has overwhelming authority over the court's decision.
- **Vacated** - When a higher court renders the lower court's judgment null and void.
- **Withdrawn** - When a court finds its earlier opinion or its lower court's opinion unresponsive.



## 2. CasemakerDigest

CasemakerDigest provides a first look into the most recent decisions handed down by state and federal courts.

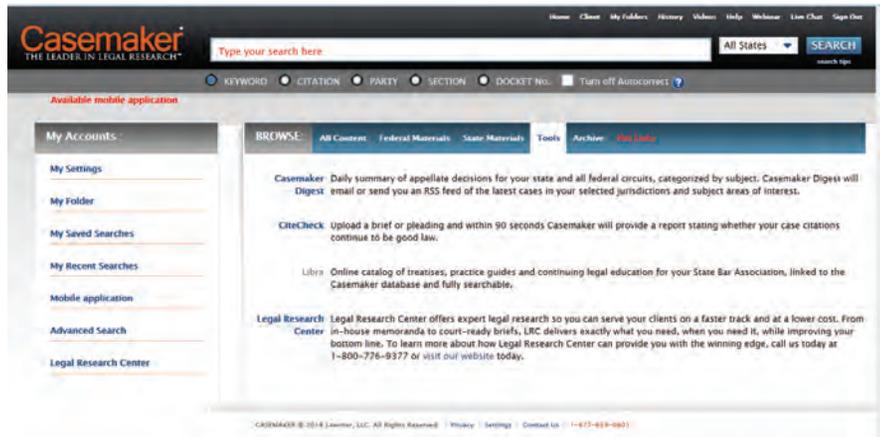
Cases are summarized as soon as they become available and you can easily create your own areas of interest to receive notifications through RSS feed and / or email of the cases most relevant to your practice.

## 3. CiteCheck

A personal cite checker for a pleading, brief or other document. Simply upload it in MS word, text or searchable PDF and Casemaker analyzes every citation and provides you with a report of good law, negative treatments, and potential citation format errors.

## How to access CasemakerDigest and CiteCheck

To access CasemakerDigest and CiteCheck, click on the “tools” tab inside the library section of the homepage. Then, select the tool you want to access by clicking on it’s title.



**NOTE: Some users have automatic access to these additional products at no additional charge. Some bars have paid for access to these features.**

## Casemaker Libra

Casemaker Libra is an online searchable library of treatises, practice guides and continuing legal education materials sponsored by bar associations and other publishers and linked directly in Casemaker. When a search is done, Libra will be listed on the results page if there is a document available related to the user’s search. Clicking on the result, will take the user to the Libra webpage.



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## Casemaker on Mobile Devices

Recently Casemaker has put out a new product – the Casemaker mobile application. It is available on for both Apple and Android devices.

From the Casemaker homepage, locate and click on the “Available mobile application” link. It can be found in red text in the upper left corner of the page below the Casemaker logo.

A new window will appear asking you to fill out some basic registration information. Once you have filled out the form, click Create Account.

You will then be provided with a registration code. Please note this code and that it is case sensitive. You will need it in just a moment.

### Apple devices

Using your Apple device, access the app store and run a search for Casemaker Legal. The app will pull up and you can tap it to view the information.

Click Install App and follow the necessary steps to download the application, and open it.

Here you will need to enter the email address you registered with and the reference code provided to you when you registered from your computer. *Please remember this code is case sensitive.*

You will then be provided with access to the Casemaker mobile application.

### Android devices

Using your Android device, access the app store and run a search for Casemaker Legal. The app will pull up and you can tap it to view the information.

When viewing the app information, tap the Install button to download the app.

You will need to tap the Accept button to proceed.

The app will then download onto your device. When it has completed the screen will change. Tap the Open button to access the app.

Here you will need to enter the reference code provided to you when you registered from your computer. *Please remember this code is case sensitive.*

You will then be provided with access to the Casemaker mobile application.

