Creating Custom ReportBooks in CaseMap

Note: you may wish to use this guide in conjunction with the guide on Reviewing Documents and Creating Affidavits of Documents – Schedule A.

Follow these simple steps to create your own custom report in CaseMap:

1. From the Reports Tab, click on ReportBooks and select Manage ReportBooks – this will be the first item in the dropdown menu.
2. From the Manage ReportBooks screen, click New...

3. Click the Add a Report button.

Click here to Add a Report...

Click the "Add Report" button to add a report.

The ReportBook must contain at least one report. Once the ReportBook is created you can: add additional reports, delete reports, rename reports, modify reports, copy reports, and adjust the order of reports.

Next Cancel
4. Click the arrow to expand the **Objects** spreadsheet options. Select **Documents** as the case data for this report. Then, click **Next**.

5. **Select All Documents** as the template on which to base the report. Click **Next**.
6. Enter a title for the report in the box provided and check the **Open “Customize Report” after the report is created** box. Click Finish.

7. If you wish to create a report based on specific data (i.e., based on a saved filter), click the **Filter...** option.
8. Select **Saved Filters**.

9. Then, scroll down and locate desired filter (e.g., **Schedule A**); select it and click **OK**.
10. **Next**, click on the **Fields...** option.

11. Locate desired field(s) to include in the report (e.g., **Tab#**), and click to highlight. Then, use the `< arrow key` to move field(s) to the **Visible Fields** column. Similarly, use the `> arrow key` to move any fields that you do not wish to be included in the report to the **Hidden Fields** column.
12. Once all desired fields appear in the **Visible Fields** column, you can adjust the order in which the field columns appear in the report by highlighting the relevant field(s) and using the up and down arrow keys to move them to the desired place. To view what the report will look like once published, click the **Preview...** option. Once the columns are satisfactorily arranged, click **Close**.

![Customize Report Fields](image)

13. From the **Edit Report** screen, click **OK**.

![Edit Report](image)
14. The **New ReportBook** screen will display, with the newly created report listed. Click **Next**.

![New ReportBook Step 1 - Add Report(s)](image1)

15. The next screen will allow you to set report options. By default, all report component boxes will be checked. To remove a component from the report, click on the relevant check box to deselect it. To customize a component, highlight it and select the **Modify...** option. That will take you to a screen that will allow you to customize its content and appearance. When finished setting report options, click **Next**.

![New ReportBook Step 2 - Set Options](image2)
16. Enter a title for the ReportBook in the box provided, and click Finish.

17. The new custom report will appear in your ReportBooks options and can be run as many times as needed without having to recreate the report. Going forward, this report can also be modified at any time by highlighting the report and selecting the Modify… option. Now that your custom report has been created, click Close to exit the Manage ReportBooks screen.