

From TDN to De Novo CaseMgr

Moving from *Trial De Novo* to *De Novo CaseMgr* will require some adjustment in how things are done, but you can do all the same things (and much more), and we think you'll find that most things can be done more easily in *CaseMgr*. This section is intended to help you get oriented in the new program.

GETTING ORIENTED

After you've imported your *TRIAL De Novo* data (all the client and matter information you've entered) using that option on the *QuickStart Checklist*, the first thing you'll probably notice is the absence of *TRIAL De Novo's Main Screen*. All these features are now easily accessible from the menus, but if you find that you miss the *Main Screen's* convenience, you can add a reasonable facsimile of the original to *CaseMgr* by moving the file called "main screen 2.app" from your "plugins - unused" folder into your "plugins" folder (it may already be installed for you). A "Main Screen" command will appear in your "Tools" menu, which you can select to view the main screen. You'll have the option of making this *Main Screen* appear automatically when you launch *CaseMgr* in the future.

As in *TDN*, the main screen may be behind other windows, in which case you can click it or use the new **Windows Menu** to bring it to the front. If you'd like its features to be more easily available at all times, try using the "Toolbar 2.app" plugin to add a "Toolbar" command to the "Tools" menu (this may be preinstalled). It has the same buttons as the main screen, but it will always be on top (and out of the way on one side of the screen) no matter how many other windows you have open at a time.

Lists

In *TDN*, you always worked on just a single client and a single matter at one time. In *CaseMgr*, you aren't working on a client or a matter until you open the "detail window" for a particular client or matter. There are several ways of getting to the details of a particular client or matter, but the first one you should learn is using the **Client** and **Matter Lists**.

Configure Lists

These lists are displayed when you start up the program (unless you have turned this feature off using the “*Personal Settings*” option of the **Edit Menu**). These lists have many powerful configuration options, but you don’t need learn those options to get started. You will access a matter or client by locating the one you want on the appropriate list, and then double-clicking to open a window of details.

CONFIGURING LIST WINDOWS

The information in *CaseMgr* that is specific to a single matter can be found using the tabs of the matter detail window; most other information in *CaseMgr* (such as insurance companies, expert witnesses, and so on) can be found in the list windows you can open through the **Lists Menu**. These lists are highly customizable, both in terms of what information is displayed and how it is presented. Once configured, lists can be printed, saved for later reuse, set to open on program startup, exported to a disk file, and used as a data source for formatted reports, among other things. And, perhaps most importantly, these lists are the easiest way to find and display detail windows for information you’ve entered into *CaseMgr*. Lists are easy to use right away but, because they’re so central to using *CaseMgr*, it’s worth taking the time to read the document chapter covering **Lists**.

Lists in *De Novo CaseMgr*, like most other windows, are resizable. For example, if you want to see more matters at one time in the matter list without scrolling you may enlarge the window to see more.

Matter Window

.Most of the information you’re used to seeing on the different screens of *TDN* is now all kept in a single place: the **Matter Detail** window. This window has tabs corresponding to each of the screens in *TDN*’s “Screens” menu, plus a few more. An important difference between *CaseMgr* and *TDN* is that in *TDN* you had to save the information on each screen as you left it.

In *CaseMgr*, all information about the matter is saved at once when you exit the matter window (or before, if

you select **Save** from the **File Menu**). For example, you might add some insurance claims, add some document records, and change the matter's custom ID. In *Trial De Novo*, it was necessary to save your changes to each claim and document record before leaving those windows, and if you then clicked on the "ignore" button on the matter window only the Matter ID change would be ignored; the others had already been committed.

But in *CaseMgr*, all the information on all the tabs is saved together with the matter, so if you went through the same process you'd have to do less intermediate saving to move between screens and would only have to save once, at the end. However, in *CaseMgr* if you clicked the *Cancel button* (*CaseMgr's* equivalent of *TDN's Ignore button*) you would be discarding all of the claims and document records you had added since opening the matter window. If you want to be sure your information is always saved in *CaseMgr*, there is a personal settings option to have information saved automatically each time you close a matter (or other detail) window.

With just a few exceptions, all of *Trial De Novo's* features are supported in *De Novo CaseMgr*. However, because of the significant design changes, almost all of them are in different places in the program. For a full listing of where to find *TDN* features in *CaseMgr*, see the "Where to Find TDN Features" section.

Calendaring

THE CALENDAR

The *TDN* Calendar has been completely redesigned. You can activate the new one by selecting **Calendar** from the **Tools Menu**. You'll be able to get up and running with it right away but there are a few things you should know.

First, in *TDN* you could assign a color and an icon to an appointment independently. *CaseMgr* replaces this with the ability to assign appointments to user-defined *categories*. Each category can be assigned a color and an icon. At the time your data was imported from *TDN*, *CaseMgr* automatically created a new category for each

unique color/icon combination it found assigned to any appointment. So if you find appointment categories with names like “Red Lunchbag,” those are results of the conversion process. Encourage your System Administrator (or anyone with Supervisor or Administration status in *CaseMgr*) to rename the categories to something more meaningful.

You can create a new appointment or task in several different ways. If you don’t currently have a calendar window open, you can select **New Record** from the **File Menu** (or type Control+N) and then select “appointment” or “task” as appropriate. If you have a calendar open, you can click its *New Appt.* or *New Task* button. You can also right-click on the calendar and select the appropriate option form from the contextual (right-mouse) menu. Finally, you can create a new appointment from the calendar’s week and day tabs by clicking and dragging on the grid. This allows you to select start and end times for the appointment without typing.

On the calendar’s week and day tabs, in addition to adding new appointments, you can change the start or end time of an appointment by dragging the appropriate edge, or both by dragging the whole appointment.

The columns and sort order on the calendar’s list tab behave much like the list windows available from *CaseMgr*’s **List Menu**.

You can look at more than one calendar at a time by holding down the shift key while selecting **Calendar** from the **Tools Menu**. This allows you to view information for two different months at a time, or to view all of your appointments for the week in one calendar while listing all appointments and tasks for a particular matter in another calendar.

In *CaseMgr*, you can view colors in the calendar in two different ways. The first is like *TDN*; appointments can have colors assigned to them based on the type of appointment, and you can view appointments in the calendar with these colors. In *CaseMgr*, you have the

Shift Key Tricks

additional option of assigning colors to users (the administrator or supervisor does this through the **Custom Categories** option of the **Administration Menu**) and then coloring appointments in the calendar by user. Note that in both cases the colors are visible only on the week and day tabs, and only if the local user has selected **Color Appts. by User/Group** in the Calendar Contextual Menu.

THE SHIFT KEY

In *CaseMgr*, the *Shift key* is often used to switch between a single and multiple occurrences of something. Some examples:

* In the file menu, when you hold down the shift key, the **Close**, **Save**, **Revert**, and **Print** options change to **Close All**, **Save All**, **Revert All**, and **Print All**.

- When you select a particular **List** from the **List Menu**, the list is displayed in a window. If you select the same menu option again, the same window is brought to the front if it was behind other windows. If you hold down the *Shift key* while selecting the same menu option again, however, another copy of the same list is opened in a new window.
- When you double-click an item in a *List Window*, a window is opened displaying details for that item. If you then double-click another item on the same list, instead of showing a *new* window, the same detail window is used to display details about the new item (if appropriate, you will have an opportunity to save changes to the first item). This feature is intended to keep your program from becoming cluttered with open windows (as you look at different clients, for example). However, there are times you might *want* to look at information for two (or more) different clients at once. To do so, simply hold down the shift key while double-clicking additional items in the list window; details for each will be displayed in a new window without disturbing the first.
- When the Calendar is already open and you select it again from the **Tools Menu**, it simply brings the existing Calendar to the front. If you hold down the shift key

while selecting the **Tools Menu**, however, you'll see that the menu option has changed to **New Calendar**. Select this to see a new *Calendar* window. Changes you make to either Calendar will be reflected in both.

- There is one place in the program where the shift key has a different, special power: the *Send Data* window. Normally, when you reach the last step clicking on the button to output your data (whether as a report, an exported file, a mail merge, or whatever) causes the *Send Window* to automatically close after the operation has completed. However, if you hold down the shift key while clicking the button, the *Send Data* will stay open after your data has been output. In addition, if you are printing a report, holding down the shift key will change the *Print* button to *Print Preview*.

Contact Notes

CONTACT NOTES

In *TDN*, there were free-form notes fields on various screens. You could “zoom” these notes to view them in a larger window and add date and time stamps. In *CaseMgr* these notes fields have been enhanced for windows of all types that appear in the “List” menu (other notes fields work the same as they did in *TDN*). These enhanced notes fields keep the information you enter at different times as separate “log entries,” each of which has its own date/time stamp and category assignment. An important feature of these entries is that only the first three lines of each is normally visible. When you put the cursor in an entry, either by clicking on it or by tabbing into it from another field, it expands to show its entire contents. You can still zoom these entries to view them in a larger window (and at a larger type size) by clicking the *Zoom* button or by right-clicking on the entry and making the appropriate selection from its contextual menu. You may also delete entries, or print all, or just one entry at a time, using the right-mouse contextual menu. You can learn a good deal more about what the Contact Notes fields can do (yes, there's more) in the documentation chapter on *Special Fields*.

Main Screen features

FEATURE FINDER

Now where do I find **that** feature in *CaseMgr*?

TRIAL De Novo's Main Screen features

Main Screen->Find Client:

Clients List (opens automatically, or from "List" Menu), or select "Find Person" from the "File" menu to search by name or other personal information.

Main Screen->Add Client:

Select "New Record..." from the "File" menu (or type Ctrl+N), or right-click on the *Clients* list window and select "**New Client**".

Main Screen->Open Calendar:

Select "**Calendar**" from the "**Tools**" menu.

Main Screen->Brief Me!:

In *CaseMgr*, the "Brief Me" report is available only to administrative and supervisory users. Find it by selecting "**History Log**" from the "**Administration menu**".

Main Screen->Attorneys:

Select "**Attorneys**" from the "**List**" menu; double-click an attorney to see his/her details, including a list of cases

Main Screen->Adjusters:

Select "**Insurance Adjusters**" from the "**List**" menu; double-click an adjuster to see his/her details, including a list of claims

Main Screen->Providers:

Select "**Medical Providers**" from the "**List**" menu; double-click a provider to see his/her details, including a list of cases

Main Screen->Conflicts:

Select "**Conflict Check**" from the "**Tools**" menu, or type Ctrl+K. To check conflicts for all parties in a matter in a single pass, click the "Conflicts" button on that matter's detail window.

Main Screen->Medical Expenses:

On the detail window for the matter you're interested in, click the "Medical Expenses" tab.

Main Screen->Archives:

Archived matters are now simply "Closed" matters and are normally hidden from the matters list. Matters are considered closed when every client in the matter has been assigned a "reason closed" in the matter. To assign this, open the detail window for the matter, click the parties tab, and then double-click the client for whom you want to assign a reason closed. To see closed matters, select "Closed" from the "Matter Status" filter of a matter list. Clients may be removed from the active client list in one of two ways: when they are assigned a "reason closed" in all their matters, or when their status is changed from the default "automatic" mode to "inactive". This status is accessible from the client detail window.

Main Screen->Reports:

See the directions for finding items in the TDN "**Re-ports**" menu below in this section.

TDN Menu Options**File Menu****TRIAL De Novo Menu Options****File Menu->Data Utilities->System Information:**

Select "**About De Novo CaseMgr**" from the "**Help**" menu, and when the "About" window appears click the "More" button. The "About" window will then have several tabs of information about the program; click the "System" tab.

File Menu->Data Utilities->Check Indexes:

If you want this functionality to be available, move the "*Check Indexes 1.app*" file from the "plugins-unused" folder into the "plugins" folder and relaunch *CaseMgr*. A "Check Indexes" command is added to the "Administration" menu. This feature is available only for supervisory users.

Edit Menu

File Menu->Data Utilities->Reindex Data *and*

File Menu->Data Utilities->Pack Data:

These two functions have been combined into a single “**Tune Up Data**” command in the “**Administration**” menu, which is available only for supervisory users.

File Menu->Data Utilities->Update Tables:

The closest to this that applies in *CaseMgr* is “Update CaseMgr” in the “Administration” menu, which is used to install updater files that *De Novo Systems, Inc.* may periodically release to fix bugs or enhance the program. Go to the *Updates* Page of CASEMGR.COM for information on available updaters.

Edit Menu->Calculator:

A calculator can be invoke from within any numeric field by typing ctrl+F5, or by typing “calc” and hitting the return key. If you move the “**calculator 1.app**” file from your “plugins-unused” folder into your “plugins” folder and relaunch *CaseMgr*, a “**Calculator**” command will be added to your “**Tools**” menu.

Edit Menu->Date Calculator:

A date calculator can be invoke from within any date field by typing ctrl+F5, or by typing “calc” and hitting the return key. If you move the “**calculator 1.app**” file from your “plugins-unused” folder into your “plugins” folder and relaunch *CaseMgr*, a “**Calculator**” command will be added to your “**Tools**” menu. *CaseMgr* also includes a feature we call “inline date calculation” that allows you to type date calculations, such as “incident +180 days”, directly into any date field. To learn more about inline date calculation, see the section on date fields.

Screens Menu

Screens Menu->Main Screen:

TDN's main screen is available in *CaseMgr* via a plug-in module. If the module is loaded, a “Main Screen” command will be in *CaseMgr*'s “Tools” menu. If you don't see it there, move the “Main Screen 1.app” file from your “Plugins - Unused” folder to your “Plugins” folder and relaunch *CaseMgr*.

Screens Menu->Calendar:

Select “**Calendar**” from the “**Tools**” menu in *CaseMgr*, or type Ctrl+L. The new calendar does a lot more than the old one, so it’s worth taking a look at the section of the documentation covering the calendar to learn more.

Screens Menu->Clients:

You can view a list of clients by selecting “**Clients**” from the “**List**” menu, and you can view details for any client by double-clicking on the client in the list. Note that the list of clients is highly configurable, and you may save any list configuration for later reuse.

Screens Menu->Matters:

There are several ways to get to a particular matter in *CaseMgr*. If you’re looking at details for a particular client and you want to see a list of matters for that client, click the “**Matters**” tab on the client detail window. If you want to see a list of all matters, or any subset of matters, select “**Matters**” from the list menu. Note that the matter list is highly configurable, and you may save any list configuration for later reuse. If you want to go straight to a matter, and you know the matter’s custom ID code or description, select “**Open Matter by ID/Description**” from the “**File**” menu, enter the ID or description, and click “**Open**”.

Screens Menu->Other Events:

Go to the calendar by selecting “**Calendar**” from the “**Tools**” menu or typing Ctrl+L. There is a drop-down menu, labelled “**Show**,” that provides various options for filtering the calendar’s contents. You can use it to select a specific matter to view events for. If you had the matter detail window for a particular matter open before you opened the calendar, that matter will be listed in the calendar’s drop-down filter menu. If you don’t see the matter you’re interested in listed there, choose “**Select a Matter...**” from the menu and double-click the matter you want in the matter list that appears. Once you’ve selected a matter, only appointments and tasks for that matter will appear on the calendar. Clicking on the calendar’s “**List**” tab, and then on the button “**All**” date

range button, you'll see all the events for that matter.

Screens Menu->Other Parties:

Open the matter detail window (using one of the methods described above). Then, click the "Parties" tab. You'll see both clients and other parties listed together. The non-client parties can be recognized by the absence of a "Y" in the "Clients" column.

Screens Menu->Insurance:

Open the matter detail window (using one of the methods described above), then click the "Ins. Claims" tab.

Screens Menu->Facts of Case:

Open the matter detail window (using one of the methods described above), then, click the "Facts of Case" tab.

Screens Menu->Witnesses:

Open the matter detail window (using one of the methods described above), then click the "Witnesses" tab.

Screens Menu->Employment:

Open the matter detail window (using one of the methods described above), then click the "Employment" tab.

Screens Menu->Med. Expenses:

Open the matter detail window (using one of the methods described above), then click the "Med. Expenses" tab.

Screens Menu->Case Expenses:

Open the matter detail window (using one of the methods described above), then click the "Case Expenses" tab.

Screens Menu->Lawsuit:

Open the matter detail window (using one of the methods described above), then click the "Lawsuit" tab.

Screens Menu->Pleadings & Motions:

Open the matter detail window (using one of the methods described above), then click the "Plead/Mot/Order" tab.

Screens Menu->Discovery:

Open the matter detail window (using one of the methods described above), then click the "Discovery" tab.

Lists Menu

Screens Menu->Depositions:

Open the matter detail window (using one of the methods described above), then click the “Depositions” tab.

Screens Menu->Documents:

First, open the matter detail window (using one of the methods described above), then click the “Documents” tab.

Screens Menu->Settlement:

First, open the matter detail window (using one of the methods described above), then click the “Settlement” tab.

Lists Menu->Change the Client:

In *TDN*, you were always working on exactly one client. In *CaseMgr*, you can have one or more client windows open concurrently. You may open a client detail window either by double-clicking the client you want in the client list window, or by select “Find Person” from the “File” menu, entering all or part of the client’s name, and then double-clicking the client in the list of people found matching your entry.

Lists Menu->Adjuster’s Cases:

Select “**Insurance Adjusters**” from the “**List**” menu. To see the cases for a particular adjuster, double-click the adjuster in the list to open the adjuster detail window, and then click the “Claims” tab. You may also locate a particular adjuster using the “Find Person” command of the “File” menu.

Lists Menu->Attorney’s Cases:

Select “**Attorneys**” from the “**List**” menu. To see the cases for a particular attorney, double-click that attorney in the list to open the attorney detail window, and then click the “Matters” tab. You may also locate a particular Attorney using the “Find Person” command of the “File” menu.

Lists Menu->Settlement Checklist:

Where *TDN* provided three different checklists, *CaseMgr* provides 6 built-in checklist types and an unlimited number of user-defined checklists for each matter. Additionally, default contents can be specified

for each type of checklist. To work with checklists for a particular matter, open the matter detail window (using one of the methods described above). Then, click the “Checklists” tab. Use the buttons on the left to select the checklist you want to work with. Administrative or Supervisory users can add new checklist types or set up custom contents for checklists by selecting “**Custom Categories**” and then “**Matter Checklist Type**” from the “**Administration**” menu.

Lists Menu->Trial Checklist:

See the Settlement Checklist directions above.

Lists Menu->Attorneys:

As in *TDN*, the attorneys assigned to a matter are recorded in two different places, depending on whether they are representing a client or an “other party.”

To view attorneys assigned to clients in a matter, open the matter detail window, using one of the methods described above, and click the “Attorneys” tab. (See the documentation for more details on how to use the attorneys tab.) To view attorneys assigned to non-client parties, click the matter window’s “Parties” tab, and double-click the non-client party you’re interested in. Attorneys assigned to that party in that matter can be found on the window that will appear.

Lists Menu->Court Reporters:

Select “**Court Reporters**” from the “**List**” menu. To see the details about a particular reporter, double-click the reporter in the list to open the court reporter detail window. You may also locate a particular court reporter using the “Find Person” command of the “File” menu.

Lists Menu->Expert Witnesses:

Select “**Expert Witnesses**” from the “**List**” menu. To see the details about a particular witness, double-click the witness in the list to open the expert witness detail window. You may also locate a particular expert witness using the “Find Person” command of the “File” menu.

Lists Menu->Insurance Company:

Select “**Insurance Companies**” from the “**List**” menu.

To see the details about a particular company, double-click the company in the list to open the insurance company detail window.

Lists Menu->Medical Provider:

Select "**Medical Providers**" from the "**List**" menu. To see the details about a particular provider, double-click the provider in the list to open the medical provider detail window. You may also locate a particular provider using the "**Find Person**" command of the "**File**" menu.

Lists Menu->Setup TDN->TDN Users:

Select "**Users and Groups**" from the "**Administration**" menu. Only Administrative and Supervisory users have access to this menu.

Lists Menu->Setup TDN->Custom Matter Types:

Select "**Custom Categories**" from the "**Administration menu**". (Only Administrative and Supervisory users have access to this menu.) In the Custom Categories window, select "Matter Types" in the pop-up menu at the top of the window.

Lists Menu->Setup TDN->Our Firm Setup:

Select "**Our Firm**" from the "**Administration**" menu. Only Administrative and Supervisory users have access to this menu.

Lists Menu->Setup TDN->Administrative Options:

The controls for history file administration can be found by selecting "**History Log**" from the "**Administration**" menu. The other options in this *TDN* window are not currently available in *CaseMgr*. If you would like these options to be in a future release of *CaseMgr*, please send us an e-mail (support@denovosys.com) to let us know. You can send us an e-mail by selecting "**E-Mail De Novo Systems**" from the "**Help**" menu.

Records Menu

Records Menu->Conflict Check:

Select "**Conflict Check**" from the "**Tools**" menu to check for conflicts for a name you enter. *CaseMgr* also has the ability to check for conflicts for every person involved in a matter in a single pass. To do so, open the

matter detail window for the matter you're interested in, and click the "Conflicts" button at the lower left of the window.

Records Menu->Archive and Reopen:

CaseMgr doesn't archive records the same way *TDN* did. Instead, inactive clients and matters do not appear in their respective lists unless you specifically request to see them. Matters and clients are handled a little differently from each other: Matters are considered "inactive" or "closed" when a "reason closed" has been assigned for each client in the matter. At that point, two fields will be filled on the main tab of the matter window ("date closed" and "why"), and the matter will disappear from the matter list unless you have selected "closed" in the matter status pop-up menu of the matter list window. To assign (or remove) a "reason closed" for a client in the matter, click the matter's "Parties" tab, double-click the client in question, and then select a reason closed (or "not closed" from the pop-up menu labeled "reason closed."

Active status for clients is normally determined automatically; clients who are involved in at least one matter in which no "reason closed" has been indicated for them are considered active. You may override this automatic status determination by going to the client's detail window and selecting "Inactive" from the pop-up "Status" menu. This will remove the client from the standard client lists, regardless of involvement in matters, until you reset the client status to "Automatic". Inactive clients can always be viewed in a client list by selecting "Not active in any matter" from the pop-up "Matter Status" menu on the client list window.

Reports Menu

Note that the Reports Menu in *CaseMgr* is configurable; use the "Configure..." option at the bottom of the menu to add and remove formatted reports, merges and exports. The Reports Menu itself can be removed from the menu Bar as well. It is provided by a Report Menu file in the local Plugins folder, and removing this file removes the menu.

Reports Menu->Brief Me:

In *CaseMgr*, the “Brief Me” report is available only to administrative and supervisory users. Find it by selecting “**History Log**” from the “**Administration**” menu.

Reports Menu->Lawsuit Schedule:

Not currently available in *CaseMgr*. We expect to include it in a future release.

Reports Menu->Export This Matter:

CaseMgr doesn’t include a feature that produces exactly the same exported file as this *TDN* feature, but it includes the ability to export all information that you entered anywhere in the program in a variety of formats, via the “**Send/Merge**” option of the “**File**” menu. See the documentation on exporting data for more information.

All other reports are now found in the “*Formatted Reports*” section of the “*Send Data*” window, which you can reach by selecting “**Send/Merge**” from the “**File**” menu. The process in *CaseMgr* has a few more steps, and now includes such options as customizing existing reports and creating your own reports from scratch. In particular, selecting which records to print works differently than it did in *TDN*; it can be more complex, but is much more powerful and flexible in *CaseMgr*. See the section on “*Formatted Reports*” to learn how to use it.

If you have the “*Report Menu*” plug-in module installed (it’s installed automatically in the default installation) you can run any report directly from the “**Reports**” menu, skipping a couple of steps through the “*Send Data*” window. Not all reports appear in the “**Reports**” menu by default, but you can customize the menu to make your most commonly-used reports instantly accessible. See the “*Reports Menu*” section for details.

Also note that the contents of any *List Window* (Like the *Client List* or *Matters List*) can always be printed by selecting “**Print**” from the “**File Menu**” or from the window’s right-mouse menu. Because List windows can be very easily customized, and your customized lists can be saved and re-used, this is often the simplest

Merge Menu

way to print reports from *CaseMgr*. To see what kinds of list windows are available, click the “Lists” Menu. See the documentation section on “List Windows” for more information.

Merge Menu->Merge:

In *CaseMgr*, mail merges are handled (along with other data output options) in the “Send Data” window. You can access this window by selecting “Send/Merge” from the **File Menu** or by typing Ctrl+M. The “Send Data” window has a wizard format that will walk you through the process of the merge. In the first step, select the type of merge you want to do (e.g. “WordPerfect Merge”) and click the “Next” button.

In the next step, select the merge template you want to use. If you imported data from *TDN*, all of your *TDN* merge templates should be listed here. In the next step, you’ll select the *TDN* data to be merged into your document. This step is quite different from *TDN*; you should read the documentation about merges to learn how to take advantage of the new capabilities. To get *TDN*-like behavior, you’ll want to select a single matter and/or client using the pop-up filter menus provided. If you had a detail window open for the matter or client before opening the “Send Data” window, that matter or client will be listed in the appropriate pop-up menu on the “Send Data” window. If you don’t see the one you want listed, you can select the “Select Matter” (e.g.) option from the filter menu and then select the matter you want from the list that appears.

Once you have selected the matter and/or client you want (and any other data that’s appropriate to the merge letter you’re printing), click the “Merge” button. If you have the “Report Menu” plug-in module installed, you’ll see a “Report” menu in your main *CaseMgr* menu bar. This menu is customizable, and isn’t actually restricted to reports; it can contain any output templates from the “Send Data” window, include merge letters. If you wish to install a commonly-used merge document into this menu for easy access, select “Configure Menu” from the “Reports” menu.

Merge Menu->Merge Maintenance->Set Up Merge Letters:
Select **“Send/Merge”** from the **“File Menu”**, or type Ctrl+M, to bring up the *“Send Data”* window. Select the type of merge you’re doing and click **“Next”**. The next step will list all of the available merge documents of that type. To create a new one, select either of the first two items in the list: **“New Template”**, or **“New Template based on existing template”**.

To modify an existing template that you’ve previously created, click once on the template to select it in the list and then, before clicking on the next button, check the box labeled **“I want to view/edit the template before merging”**. Built-in templates may be marked as locked, and to edit those, you must select **“New Template based on existing template”** and then click the **“Next”** button. This assures that the original template will always be present in its original format.

Merge Menu->Merge Maintenance->Set Up Your Word Processor(s):

The first time you run a merge using a particular word processor with *CaseMgr*, you will not be able to proceed past the step at which you indicate the locations of files involved in the merge until you identify the location of that word processor’s program file (with a name like *“Winword.exe”* or *“Wpwin10.exe”*) on disk. You don’t need to set up your word processor ahead of time in *CaseMgr*.

Help Menu->System Information:

In *CaseMgr*, select **“About De Novo CaseMgr”** from the **“Help Menu”**. To view the system information, click the **“About”** window’s **“More”** button, and then click the **“System”** tab.

Help Menu->About:

Select **“About De Novo CaseMgr”** from the **“Help Menu”**.

***** UNSUPPORTED FEATURES *****

At the time of this writing, there are a few *Trial De Novo* features that are not supported in *De Novo CaseMgr*. They may become available in the future, depending on customer feedback. If you would like to contact *De Novo Systems* regarding these features or anything else, please select “**E-mail De Novo Systems**” from the “**Help Menu**” to send us a message.

*The ability to set custom access privileges for certain user types, part of *TDN's* administrative options window, is not currently supported in *CaseMgr*.

**TDN* had the option to warn users when available disk space dropped below a certain threshold. This is not present in *CaseMgr*.

**TDN's* “Lawsuit Schedule” report has not yet been implemented in *CaseMgr*.