CaseSoft Software Training Overview

Tens of thousands of CaseSoft clients have done great things using our tools without the aid of any training.

Yes, our software is so easy to use that you can become an expert without our assistance. But why not

expedite the process by selecting from our wide array of training offerings?

Which Training Choice Is Right For You?

We offer many phone-based, web-based and in-person training options. Which choice is right for your organization? All of the above!

Please don't view our training options as mutually exclusive. Employ a combination of approaches based on such factors as the way your training needs will change as your staff gains case analysis experience. Here's a common mix and match scenario:

Month 1:   Take phone trainings and/or view introductory webinars.
Month 2:   Have us visit you to conduct in-person training and/or to help jumpstart a critical case file.
Month 3+: View webinars on specific advanced topics and the What's New webinars we post as we release new versions of our tools.

Let us work with you to develop a custom plan to roll CaseSoft tools out to your staff. Contact your CaseSoft Account Representative or write csa@casesoft.com.

Our Training Staff

Our instructors are CaseSoft staff members from our Ponte Vedra Beach, Florida headquarters where we develop our products. When they're not teaching, our trainers are fielding support calls and honing their product knowledge and case consulting experience.

Contact Us With ANY Question Support

We offer award-winning support in addition to great training. Our Contact Us With ANY Question Support commitment means we're here to assist with all issues, not just technical ones.

And how about this for unusual software support? A day or two after your issue is resolved, we'll check back with you to make sure all is well.

Phone and email support is no-charge for clients covered by CaseSoft Maintenance. You'll find us standing by at support@casesoft.com and 904.273.5000.

Extensive No-Charge Training Choices for Clients on Maintenance

50+ Online Tutorials at the CaseSoft Webinar Center

The CaseSoft Webinar Center provides dozens of online training courses on the five software tools we develop and also on Adobe Acrobat. Webinars are available 24/7 and cover introductory to advanced topics. Most are short and sweet – running under 20 minutes. New sessions are added regularly.

Sample Introductory Webinars:
• *CaseMap in Twenty Minutes*
• *TextMap in Ten Minutes*
• *What's New in TimeMap 4*
• *Acrobat 101*

Sample Advanced Webinars:
• *Acrobat 201*
• *CaseMap ReportBooks 101 & 201*
• *Organizing Case Law Research*
• *TimeMap 4 – Send to PowerPoint Integration*

Visit www.casesoft.com/webinar.htm for a complete listing of webinars and to view sessions of interest.

CaseMap Fundamentals Phone Training

Over 25,000 CaseSoft clients have taken a no-charge CaseMap Fundamentals phone training session. This 60-minute course is typically conducted one-on-one and hands-on. You work with CaseMap on your computer as instructed by a CaseSoft trainer on speakerphone.

It definitely costs us more to train users individually. But this format permits trainees to ask their specific questions and allows the session to move at the right pace for the individual being trained.

While the training is free, we do ask you to originate the call. Please also note that our phone training schedule is typically booked two weeks in advance.

Contact us at training@casesoft.com or 904.273.5000 to schedule a CaseMap Fundamentals phone training.

CaseMap/TimeMap Work Product Tour

Our CaseMap/TimeMap Work Product Tour is a second no-charge phone training option. It's a 45-minute session that we conduct for trial teams and litigation section meetings.

The tour provides an overview of the many types of work product available using our CaseMap case analysis tool and our TimeMap timeline graphing tool. It's a great way to familiarize those who won't be using CaseMap or TimeMap directly with the wide range of reporting options available to them.

Contact us at training@casesoft.com or 904.273.5000 to schedule a CaseMap/TimeMap Work Product Tour.

Extensive Fee-Based Training Options with Discounts for Clients on Maintenance

CaseSoft Academy Open-Enrollment Classes

Thousands of clients have attended the open-enrollment classes we teach in 20+ cities in Canada and the U.S.

We offer a number of open-enrollment programs, including:
- *CaseMap 201*
- *CaseMap in Half a Day*
- *Enhancing Your Litigation Practice with Adobe Acrobat*
- *CaseSoft Support/Training Certification*

Sample topics from the *CaseMap 201* agenda include:
- *CaseMapping Strategies*
- *Sorting & Searching in CaseMap*
- *Creating Great Work Product*
- *Using the "Send to CaseMap" Feature in Acrobat*

The fees for CaseSoft Academy classes range from $145 for some half-day sessions to $445 for the full-day CaseSoft Support/Training Certification class. Organizations covered by CaseSoft Maintenance save $50 per seat.

Visit www.casesoft.com/csa.htm to review complete agendas and the dates and locations of upcoming classes.

Training at Your Shop or Ours

Our CaseSoft Academy road warriors travel North America conducting custom training sessions at client offices.

A day of in-person training can turn a group of novices into power users. It can also be used to conduct a series of sessions with distinct purposes. For example, CaseMap/TimeMap core features training for new users in the morning, a CaseMap/TimeMap Work Product Tour for the litigation section at lunch, and an Acrobat for Litigation training session for the paralegal staff in the afternoon.

On-site trainings are $900 per day plus travel expenses for organizations covered by CaseSoft Maintenance and $1600 per day plus expenses for organizations without Maintenance. Flat fees that encompass both training and travel can also be arranged.

We'd also love to have you visit us for training or to jumpstart a case. Our offices are in Ponte Vedra Beach, Florida, 45 minutes south of Jacksonville and 2.5 hours northeast of Orlando. Hotel accommodations are a short walk from our shop. Beach and golf resorts are a five-minute drive.

Write us at csa@casesoft.com to learn more or to schedule a session at your office or ours.

Case Analysis Jumpstarts

Let us visit you to conduct a Case Analysis Jumpstart. In this daylong brainstorming exercise, a CaseSoft Academy consultant acts as moderator guiding the session, a scribe quickly organizing material in CaseMap, and an educator showing your team how to take the ball forward.

By the time the session ends, we'll have worked together to create . . .
- A detailed cast of characters
- A lexicon of case-related terminology
- A multi-level outline of case claims and issues
- An initial fact chronology
- A Case Summary ReportBook
- Other work product
- A plan for ongoing case analysis

Jumpstarts are $900 plus expenses for organizations covered by Maintenance and $1600 plus expenses for those without Maintenance. Flat fees that encompass both training and travel can also be arranged.

Jumpstarts Are Typically Client Billable: Case Analysis Jumpstarts are case-specific brainstorming exercises that can have a dramatic impact on case preparation. As such, the cost of almost every Case Analysis Jumpstart is passed along to the ultimate client.

Write us at csa@casesoft.com to learn more or to schedule a Jumpstart.

Acrobat Training Options — Acrobat-Only & Acrobat/CaseMap

Most of our clients have chosen Adobe PDF as the standard format for document images on all but the very largest cases. Our CaseMap case analysis tool features tight integration with Acrobat. CaseMap makes it easy to apply Bates Numbers to PDFs, to instantly create document indexes based on a collection of PDFs, to cull critical passages from PDFs and much more.

These factors prompted us to develop a wide array of Acrobat training options, including no-charge webinars and white papers and fee-based open enrollment classes. Many of these sessions are focused strictly on Acrobat and make virtually no mention of CaseSoft tools. Others detail the tight integration between Acrobat and CaseMap.

Learn more by visiting www.casesoft.com/acrotrain.htm.

Understanding CaseSoft Tools Maintenance

When your CaseSoft licenses are covered by our Maintenance Plan you receive all upgrades, phone/email support and many training offerings at no additional charge. You also receive substantial discounts on fee-based training.
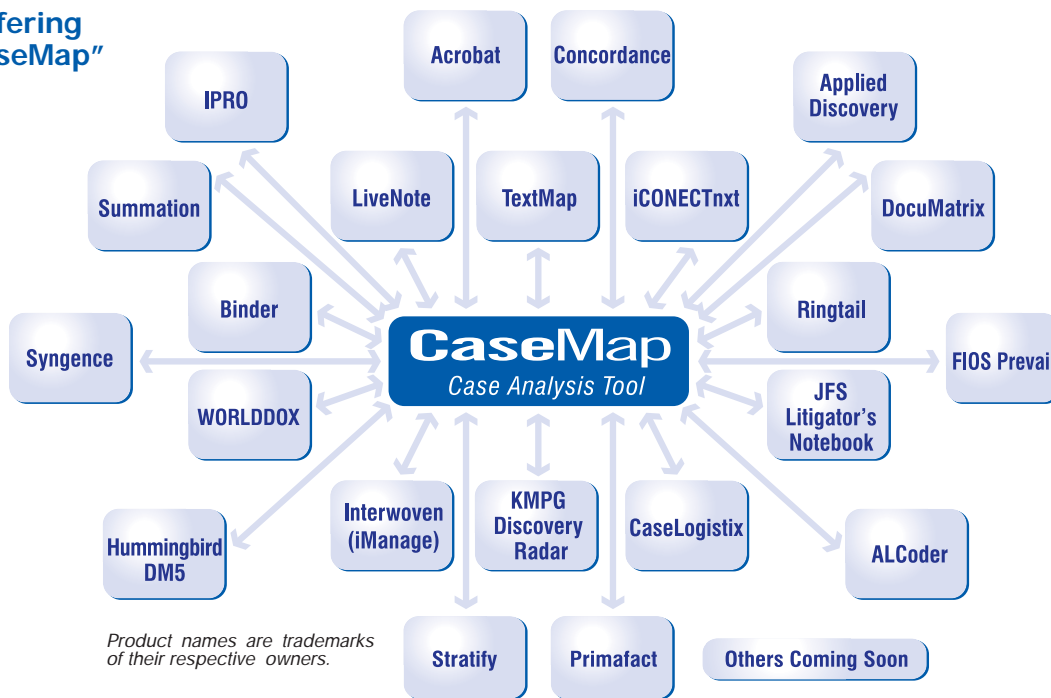
New licenses for CaseSoft tools automatically include three months of Maintenance. We encourage you to purchase Extended Maintenance so you'll continue receiving support, training and all upgrades.

Learning the "Send to CaseMap" Feature in Acrobat & 20+ Other Products

Adobe Acrobat and over 20 other software products offer a "Send to CaseMap" feature. "Send to CaseMap" makes it easy to cull critical passages from documents stored in these applications and to instantly organize these selections in CaseMap. One click in CaseMap reselects the passage in the sending application.

The CaseSoft Webinar Center (www.casesoft.com/webinar.htm) offers online tutorials that show "Send to CaseMap" in action. This powerful feature is also taught during on-site trainings and in our CaseSoft Academy open-enrollment classes.

Products Offering "Send to CaseMap" Integration

Acrobat · Concordance · Applied Discovery · IPRO · DocuMatrix · Summation · LiveNote · TextMap · iCONECTnxt · Binder · Ringtail · Syngence · **CaseMap** *Case Analysis Tool* · FIOS Prevail · WORLDDOX · JFS Litigator's Notebook · Hummingbird DM5 · Interwoven (iManage) · KMPG Discovery Radar · CaseLogistix · ALCoder · Stratify · Primafact · Others Coming Soon

Product names are trademarks of their respective owners.

Case Analysis White Papers

The following free white papers are available at www.casesoft.com/article.htm:

- **Chronology Best Practices**
- **The Bell Curve and Document Indexing/Imaging**
- **Making the Most of a Cast of Characters**
- **Creating and Using Issue Analysis Memos**
- **Getting Case Analysis off to a Fast Start**
- **Better Visuals Via Brainstorming**
- **Brainstorming Your Way to a Winning Case Strategy**
- **The Three Flavors of Adobe Acrobat**

CaseSoft
Case Analysis Made Easy

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