CaseMap Installation Guide

- What is CaseMap
- What’s New in CaseMap
- Preliminary Planning
- Installing the CaseMap Server
- Installing the CaseMap Admin Console
- Installing the SQL Import Utility
- Installing the CaseMap Client
Publisher
...LexisNexis
Curriculum Development Mgr
...Michael Gertley
Senior Technical Writers
...Lisl Mafli
...Alise Suebsanh
Curriculum Designer
...Michael Gertley
Training Administrator
...Annie Oman
CaseMap Trainers
...Rozanne Langley
...Ed Adams
CaseMap Support
...Sam Scaggs
...Ivan Browning
...Courtney Wilkinson

Special thanks to:
All of the people who contributed to the CaseMap Answer Center, which is the source of this document. This includes the LexisNexis CaseMap trainers, development team, support team, and QA team. In addition, we'd like to thank all our clients who provide valuable feedback to the CaseMap Answer Center topics that continually improve the information we strive to provide.
# Table of Contents

Chapter 1 What is CaseMap 5

Chapter 2 What's New in CaseMap 7

Chapter 3 Installing CaseMap 13

1 Preliminary Planning 13
   What to consider for preliminary planning 13
   What you need to know before installation 16
   What are the system requirements 19

2 Installing the CaseMap Server 24
   Welcome to CaseMap Server 24
   How to configure SQL for CaseMap Server 26
   How to install CaseMap Server 27

3 Installing the CaseMap Admin Console 37
   How to install CaseMap Admin Console 37

4 Installing the SQL Import Utility 48
   How to install the CaseMap SQL Import Utility 48
   What you need to know about migrating case files 54
   How to migrate case files to CaseMap Server 56

5 Installing the CaseMap Client 58
   How to install CaseMap 58
   How to register the CaseMap Server in CaseMap 69
   How to convert local case files 72
   How to update CaseMap versions 73

6 How to test installation 74

7 How to verify connectivity 75
What is CaseMap
What is CaseMap

CaseMap is a case organization and analysis tool that will help you track and build case strategy. CaseMap helps you organize critical information about facts, documents, and issues in cases by providing the tools you need to analyze facts and issues. CaseMap also helps you quickly create case reports for case staff, your client, and the court.

As you analyze case files in CaseMap, you will gain a thorough understanding of disputes and clarify your strategies in supporting case arguments. As you sort out what you know about each case, you will find it easier to identify what you don't know and need to find out. CaseMap helps ensure complete discovery, regardless of the type of case (civil or criminal).

- **Share case file access to ensure efficiency**

  CaseMap case files can be used by multiple case staff at the same time. The case file created should be stored in a shared location on your network to ensure that all users can access it. In this manner, all case file users are able to work together to organize critical knowledge about the facts, the cast of characters, and the issues regarding the case.

- **Allow CaseMap to work on your behalf**

  CaseMap is designed to manage the requirements of capturing information about case facts, documents, and issues. It is flexible and customizable to handle the unique needs of your cases.

  Investing the time to organize and share case knowledge in CaseMap means saving time and energy to analyze, strategize, file motions or briefs, negotiate settlements, or take cases to trial.

  Even if you have not worked on the case file for months, CaseMap keeps case knowledge, documents, and strategy preserved so you can quickly pick up where you left off.

- **Learn what’s new in CaseMap**

  CaseMap continues to bring new and exciting features to your organization to keep it working smart on your behalf. Take time to review recent release updates and familiarize yourself with the new tools and features that give you an advantage in case file analysis and management.

  For more information, see [What’s New in CaseMap](#).

**Related Topics**

- [What’s New in CaseMap](#)
- [What is CaseMap Server](#)
What’s New in CaseMap

Chapter 2
What's New in CaseMap

CaseMap 9.0 Features

CaseMap v9.0 introduces centralized and secure remote access to case files using Microsoft® SQL Server®. CaseMap v9.0 SQL allows speedy access to case files over a wide area network (WAN) or local area network (LAN), or to traditional CaseMap cases on a LAN. SQL cases provide additional security and flexibility so different users can use different sets of features they need to work on the cases. End-users who are familiar with using CaseMap's earlier versions will not have to learn any new features - the only thing that has changed is the flexibility of creating some cases that may be unusually large or long-lived for the CaseMap SQL server environment.

- **Host case files on Microsoft SQL Server**

  Case files in previous versions of CaseMap stored information in Microsoft® Access databases. Our LexisNexis CaseMap development staff has greatly customized the appearance and ease-of-use of these files to make them uniquely CaseMap. Most users store the case files on a shared network server for multi-user access and back-up security.

  The CaseMap case files pre-CaseMap 9 store case information in a database built on the same "chassis" as Microsoft® Access.

  CaseMap v9.0 introduces case files that can be created and stored on SQL Server, making it easier, more robust and scalable to sort out case data and relationships. Don't worry if your organization does not have a SQL Server. There's no need to buy one and set it up because CaseMap v9.0 still creates case files that can be stored locally on a regular network server.

  For more information, see [What is CaseMap Server](#).

- **Review the two types of case files**

  - SQL Cases - Created by a system administrator using a special CaseMap Admin Console. Designated case staff are assigned to cases by the administrator. When SQL case files are enabled, users have the option of opening local or SQL case files.
  
  - Local Cases - Created by anyone running CaseMap v9.0 and saved to a designated network folder. Case staff can be edited by anyone who's authorized to do so. Local cases are exactly the same as previous versions of CaseMap case files.

- **Relax with features remaining identical to CaseMap v8.5**

  Existing CaseMap users will recognize that the program feature are identical to those in CaseMap v8.5. The appearance of CaseMap v9.0 is the same as CaseMap v8.5, except for installations that have the SQL case feature switched on.

  If SQL case files are enabled in CaseMap v9.0, the SQL features appear when you open CaseMap, allowing users the option of opening a local case or SQL case.

- **Employ centralized case and user administration**

  IT and Litigation Support Professionals asked for greater security for CaseMap case files and CaseMap v9.0 delivers. Organizations that use CaseMap v9.0 and install the CaseMap Server and CaseMap Admin Console are able to centrally control the creation of new SQL...
case files and assign users to case files. Administrators are able to assign specific permissions for case staff. Permissions are assigned to a user via roles. A user will have same set of permissions when assigned to single or multiple SQL Cases. For example, some users may be able to enter data on a case but are not able to create or delete custom fields.

**Enjoy improved performance**

Large organizations share case files over a wide area network (WAN). The case files often grow over time into large files. CaseMap v9.0 SQL cases provide faster performance over a WAN and easily handle large amounts of case data - even if case staff are working in the same case file while some are located in New York and others in Los Angeles.

**Benefit from a static price**

There is no additional cost for CaseMap v9.0 and the SQL components required to enable a SQL server to host CaseMap cases. If your organization has CaseMap subscriptions that are current, you have the option to use CaseMap v9.0 and the SQL features.

For details, see [What is CaseMap Server](#).

**Contact Support and Sales with questions**

For sales questions, please contact your LexisNexis CaseMap Account Representative or send email to casemap.sales@lexisnexis.com.

For technical support, please please call 877-301-0344. International users please call 904-373-2160. Hours for live support are 9:00 AM to 6:00 PM, Eastern U.S. time. Or send an email to casemap.support@lexisnexis.com.

**CaseMap 8.5 Features**

**Updated integration with Shepard’s Citations**

Automatic look-up for Shepard’s signals for case law citations when a case is opened.

Shepard’s signal status display for each case law citation in the Authorities spreadsheet.

**Integration with LexisNexis online content**

Integration with LexisNexis online content allows you to easily perform context-specific searches for people, organizations, issues, and case law.

**New Case Jumpstart Wizard**

CaseMap’s new Case Jumpstart Wizard allows for initial data entry of a cast of characters when a case is first created.

**CaseMap 8.0 Features**

**User interface design changes**
CaseMap has a new user interface design that looks and feels like Microsoft® Outlook 2007. The navigation pane was changed to displays favorite spreadsheets in the top panel for easy access. All spreadsheets are in the case file display in the All Shortcuts panel. To make a spreadsheet a favorite, right-click on it in the All Shortcuts panel and select Add to Favorites.

Friendlier spreadsheets

With the new user interface design, spreadsheets now look different too. Rows display in alternate shades so it is easier to track information across the spreadsheet. Selected records now display all field buttons for drop-down menus or other tool options. All records with linked file attachments now display a Paperclip icon, even if the record is not selected. Tool Tips are also available for each field by floating your mouse pointer over the field header.

New Case Replication Wizard

A new Case Replication Wizard makes it easier to take a case replica and set of linked documents on the road. The wizard makes it easier to put a replica and folder of linked documents on a laptop. You also have the option of saving a replica to another location on the network.

New DocPreviewer plug-in for Acrobat PDF and Outlook integration

CaseMap's new DocPreviewer plug-in replaces the previous CaseMap Plug-in PLUS tool for Adobe® Acrobat users. The DocPreviewer plug-in still offers the Bates stamping tool for PDFs and still imports the number to the Documents spreadsheet while it adds linked PDF records. But the enhanced plug-in also includes additional, valuable functionality. DocPreviewer is an additional subscription charge if you want the Bates Stamp PDFs and Convert E-mails to PDFs tools. DocPreviewer tools are accessible as shortcuts located on the navigation pane.

Bates Stamp PDFs

Use to Bates stamp PDF files.

Convert E-mails to PDF

Use to convert emails in Microsoft® Outlook folders to PDF files that can be sent to CaseMap. Any email attachments are embedded in the PDF file. You have the option to populate the Persons spreadsheet with senders and recipients of the email. A wizard helps makes this conversion process easy. CaseMap will automatically link the emails to the senders and recipients.

Import PDFs

Use to import one or multiple PDF files in to CaseMap. Data imported includes the page count, Bates numbering, the document's full name and short name. Body content from the PDF file is imported by using CaseMap's Send To utility. You must have Adobe® Acrobat (Standard or Professional) installed on the same computer as CaseMap to use this feature.

Review PDFs

Use to review a set of linked PDF files in Acrobat without having to open multiple documents and flip back and forth between the PDF file and CaseMap. Buttons in the
Acrobat toolbar allow you to move to the next or prior linked document.

- **Batch Print PDFs**
  
  Use to print all linked PDF documents in a spreadsheet.

- **Create a Privilege Log**
  
  Use to print a Privilege Log from DocPreviewer. This is a CaseMap report feature that is now accessible in DocPreviewer as well as from the Reports menu.

- **Analyze Bates Numbers**
  
  Use to run reports on whether there is any duplicate Bates numbering of documents or any gaps in numbering. This tool includes an option to save current tab data as a report.

- **Locate a Bates Range**
  
  Use to search a Bates range to locate a particular set of records, which then displays in the Documents spreadsheet. See How to locates a Bates range.

- **New Getting Start with CaseMap wizard**
  
  When you open CaseMap, a new interactive panel displays, Getting Started with CaseMap, that provides tips on using CaseMap. Links in the panel point to concise explanations of basic tasks in the case analysis process. From this panel, you can also open an example case file for practice or simply start creating a new case file for your client.

- **Report menu enhancements**
  
  CaseMap reporting enhancements include a new Reports menu, a Privilege Log Wizard, and Group by Objects reports.

  **The Reports menu is now consolidated to include all reporting options.**
  
  - A Print or PDF Current View submenu allows you to print a hard copy of the current spreadsheet view or convert it to a PDF file.
  - A Send Current View To submenu allows you to exporting data in a current spreadsheet view to other applications, including TimeMap®, NoteMap®, Microsoft® Word and Excel, Corel® WordPerfect. You can also export data to an HTML file.
  - All ReportBooks tools and wizards are located on this submenu.
  - The By Issue Report Wizard and Summary Judgment Wizard now display on the Reports menu.
  - Two new report wizards are included: Privilege Log Wizard and By Object Report Wizard. The Privilege Log Wizard allows you to print reports of documents marked as privileged under attorney-client, attorney work product, or both. The By Object Report Wizard lets you print facts reports by object type, such group facts by document, facts grouped by person, documents grouped by person, and more.

- **New Search menu and status bar**
  
  A new Search menu contains all search menu tools and options. Choose from a number of
What's New in CaseMap

Guided searches to cull spreadsheet data by objects or issues, locate text by field, or by what's been recently added to a case file. Save custom searches to the My Saved Searches submenu to rerun later. Each time you rerun a saved search any new data added to the case file is captured. You can also open the Advanced Search panel from this menu. The Search menu is accessible by clicking on the Search button on the Standard toolbar.

A new search status bar displays above each spreadsheet so you can easily see what filter is currently applied or whether it's a combined search. Click the Cancel Search button on the status bar to refresh the spreadsheet data and run a new search. Click the Save button to store the search results on the My Saved Searches submenu to rerun the filter later.

- **Bulk import PDF documents**

  CaseMap now offers the option to bulk import a set of documents into a case file. Using the Send To utility, you can define where coded information from the files will be stored, such as the Documents or Proceedings spreadsheets. Once you have defined how you want the documents linked, CaseMap remembers the settings for subsequent imports and will not duplicate records.

- **Batch Print PDFs**

  You can now batch print a set of documents.

**Related Topics**

- What is CaseMap
- What is CaseMap Server
Installing CaseMap
Installing CaseMap

**Preliminary Planning**

What to consider for preliminary planning

Preliminary planning for implementing any software application is important for achieving the best set-up results, the first time. We recommend that you take some time to review and plan how your organization will be using CaseMap with the CaseMap Server, the CaseMap SQL Import Utility and CaseMap Admin Console. Planning ahead helps ensure that administrative tasks are minimized for initial setup and your long-term maintenance of the application and its companion products.

Plan before you install CaseMap

Before installing CaseMap Server, CaseMap Admin Console, and CaseMap, we recommend you review the following checklist to ensure you have not missed any steps in planning details.

<table>
<thead>
<tr>
<th>Best Practices: Preliminary Planning</th>
</tr>
</thead>
</table>

**System Requirements / Licensing**

Review system requirements and licensing options

**Network Directory Setup**

Ensure CaseMap users have full network access to case file directory folders where local case files are stored, or have SQL cases assigned to them in the CaseMap Admin Console

* CaseMap does not support/encourage VPN access to network files, which can cause user access issues unless it is installed on CITRIX. Remote users need a replica copy of the case file installed on their hard drive.

Have preset directory folders for each client/matter

**Server Setup and Security**

Implement server firewalls

Set up CaseMap security in CaseMap and the CaseMap Admin Console using Windows or simple authentication

*We recommend that you use Windows authentication for SQL cases

Enable security and require logons for all CaseMap case files

Implement password policies

Use private IP via VPN access

**Receiving Data and Images**

Have a data collection and processing plan in place

Verify that file formats are recognized in CaseMap

Consider converting source files to Adobe Acrobat PDF files to use the Send to
Best Practices: Preliminary Planning

CaseMap tools, preserve case law research from www.lexis.com, and to store client emails for other case staff to view.

Have a directory location with subdirectories in a structure that prepares you for optimal organization of the various case files, image source files, templates, reports, and back-ups for each.

Case File Design

Create local case file structure templates for different types of cases or to retain specific spreadsheet fields and views.

* CaseMap Server does not support templates for SQL case files. However, you can create a new SQL case file in the CaseMap Admin Console and register it during the creation of new cases. Users may also import a local case file template into the CaseMap Admin Console to use as a new SQL case file.

Implement field name conventions for consistency.

Implement short name conventions for consistency.

Customize the Intake Interview Jumpstart Form for your organization’s needs.

Managing Clients / Users

Inform users of training options, immediately.

Identify any remote staff that may need access to case files on your network or require replicas of case files.

Install native viewer applications for users who need to view documents and files that are linked to case records in CaseMap.

Create email templates for clients to use the Intake Interview Jumpstart Form.

Create emails for users that include their logon information and pertinent case or software instructions to get them started.

Roles and Responsibilities

Ensure users understand the case file design and know how they will specifically use CaseMap for analysis.

Ensure users understand timelines and processes required for managing CaseMap case files.

Clearly define roles and responsibilities among attorneys, paralegals, legal secretaries, litigation support staff, and IT staff, etc.

Implement policies for who can and cannot create/modify case file databases, add/delete users/roles, or conduct other sensitive tasks.

Reporting

Have a production plan in place for delivering reports and information to third parties.

Know what types of reports will be generated by users and how to print them.

Security

Apply security to the network directory folders that contain case files and images to prevent others from viewing privileged content or revealing case...
### Best Practices: Preliminary Planning

<table>
<thead>
<tr>
<th>Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply read-only rights to spreadsheet fields to restrict users from adding or changing content</td>
</tr>
</tbody>
</table>

### Ongoing Maintenance/Management

<table>
<thead>
<tr>
<th>Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have a dedicated admin machine for the sole purpose of managing CaseMap case files on the CaseMap Server</td>
</tr>
<tr>
<td>Schedule maintenance windows to ensure that all users are out of case files</td>
</tr>
<tr>
<td>Have a quality control plan in place for administrative tasks like importing/exporting data, synchronizing case files, and performing global edits</td>
</tr>
</tbody>
</table>

### Backup/Data Recovery

<table>
<thead>
<tr>
<th>Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have a back-up schedule in place</td>
</tr>
<tr>
<td>Always back up .cm9 local case files</td>
</tr>
<tr>
<td>Always back up .MDF &amp; .LDF for SQL files</td>
</tr>
<tr>
<td>Always back up SQL case file databases</td>
</tr>
<tr>
<td>Ensure your internal guidelines are in place for back-up and data retrieval</td>
</tr>
<tr>
<td>Implement archiving and data destruction policies</td>
</tr>
</tbody>
</table>

### Updating Considerations

<table>
<thead>
<tr>
<th>Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>A best practice is to always be on the most recent version of CaseMap, and CaseMap Server/CaseMap Admin Console</td>
</tr>
<tr>
<td>Ensure that you can update all users accessing a specific case file at the same time</td>
</tr>
</tbody>
</table>

### Quality Control

<table>
<thead>
<tr>
<th>Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have well-defined checklists/procedures in centrally available location</td>
</tr>
<tr>
<td>Ensure that hand-off processes are well-defined</td>
</tr>
</tbody>
</table>

- **Ensure you have a plan for receiving data**

  When you receive data from clients, data processing vendors, or third parties, you should always review all files to ensure they have the proper formats for CaseMap.

  We recommend having files OCR-processed prior to applying a Bates stamp to them.

- **Determine methods for working with documents/images**

  You will want to pre-plan how you want to save and store documents/images for your case files. We recommend that you convert documents, emails, authorities to Adobe Acrobat PDF files and store these files in network directory folders along with other case files data.

  You can link to or attach native source files to case records and view them from CaseMap if you have the native application installed on the same machine as CaseMap and it is added to the list of file viewers. Converting native source files to PDF files allows you to take...
advantage of CaseMap and DocPreviewer tools that integrate with Acrobat.

Plan case file design and structure in advance

Designing case files is a necessary planning phase that ensures consistency in structure, naming conventions, security, user permissions, and more. The more forethought you apply to designing case file templates and user roles for implementing security, the easier it is for you and other administrators to identify any irregularities that may occur.

Consistency is key when it comes to field naming conventions, use of field types, and spreadsheet field placement in CaseMap case files. When field guidelines are established, it is less confusing for users and administrators who are working in multiple case files.

Determine a clear migration path for case files

A migration path for importing case files from previous CaseMap versions is essential. You should only migrate a case file to a CaseMap Server case file once. If you experience an issue during the import, you can try migrating the case file again. Each SQL case file requires its own SQL database.

For more information, see How to migrate case files to CaseMap Server.

What you need to know before installation

Review the following information to understand the installation and implementation process.

Installing CaseMap involves the following:

- CaseMap Server
- CaseMap SQL Import Utility (optional for clients migrating existing local cases to SQL cases)
- CaseMap Admin Console
- CaseMap client application installed on local machines

Implementing CaseMap involves the following:

- Configuring SQL for CaseMap Server installation
- Creating network folders to store local case files or creating SQL servers and SQL case file databases in the CaseMap Admin Console
- Applying network folder and field level security for local cases in CaseMap or setting up users, roles, and permissions in the CaseMap Admin Console for SQL cases
• Assigning users to SQL case file databases in the CaseMap Admin Console
• Creating network folders to store case documents and other related files (audio, graphics, etc.)

Learn how CaseMap licensing works

The licensing options for CaseMap include:
  • **Single seat** - A lower cost option for clients
  • **Multi-seat** - Allows for installation on both PCs and the application server
  • **Enterprise** - Allows for 400+ users and includes discount options

Review the system requirements

Please review the current system requirements for setup considerations for your processor and RAM. Review each section in advance before making expensive hardware and network decisions that may not be in line with LexisNexis recommendations.

Please keep informed of CaseMap release updates and how they impact your system by checking our CaseMap Technical Support Web site at http://law.lexisnexis.com/casemap/customer-support.

Store local case files on network for staff access

Local case files should be stored on the network where all case file users can access the file. Local case files should be stored by case name or matter, or according to your organization's internal guidelines.

If there is no network setup or only one individual is using a case file, the case file can be stored locally on a user's hard drive. In this instance, nightly back-ups of the case file should be made to a flash drive or portable hard drive. In this scenario, other users cannot access the case file without using a replica copy. Synchronizing data with the primary case file should then occur regularly.

Use directory folder naming conventions

Most organizations have network directory design guidelines already in place for storing information in a consistent manner. We recommend that you consider our example while you review your own.

The following example reflects folder naming conventions and directory hierarchy for storing case files, documents, replica case files, back-up files, etc.
If you are planning to move a local case file to a new directory location, and want to ensure that the database is still accessible to users, build a directory template structure that is easy to relocate.

Apply folder security to local case files to control access

Local case file security is applied by controlling access to case files stored in directory folders on your LAN. Grant folder access to only those users working on a particular case file. In this manner, you are preserving case file integrity by preventing others from reviewing your case information and strategy.

Set up users and assign cases/roles for access

All users must be added to a case file in order to access it within CaseMap or be assigned to a SQL case file in the CaseMap Admin Console. Having a CaseMap license does not grant a user permission to open a case file.

We also recommend that you require users to set passwords. Users can set and change their passwords at any time. If a user of a local case has forgotten a password, contact CaseMap Support to have it reset. If a user of a SQL case file has forgotten a password, he or she should contact their case file database administrator.
What are the system requirements

Please review the current system requirements for setup considerations and suggestions. Review each section in advance before making expensive hardware and network decisions that may not be in line with LexisNexis CaseMap recommendations.


- When setting up users for local cases, ensure that all user have full network access to each case file database directory they will need to access. When setting up users for SQL cases in the CaseMap Admin Console, ensure that users are assigned appropriate roles and assigned to the case files in which they need access.

- Review the system requirements

Reference the following system requirements for each component.

- CaseMap Client Application v9.0

CaseMap must be installed and run on a local hard drive. CaseMap cannot be run from a network server. CaseMap data can either be stored in a file on network drive or on Microsoft SQL Server database. You must be logged on with Admin rights to install CaseMap.

- 1 GHz or faster 32-bit (x86) or 64-bit (x64) processor
- 1 GB RAM (32-bit) or 2 GB RAM (64-bit)
- Approximately 60 MB of free disk space on the system drive
- Super VGA (800 x 600) or higher-resolution monitor with 256 colors
- Any of the following versions of Microsoft Windows:
  - Microsoft Windows XP Professional or Home
  - Microsoft Windows 2003 Server
  - Microsoft Windows 2008 Server
  - Microsoft Windows Vista
  - Microsoft Windows 7
- Microsoft Internet Explorer v6.0+ is required for Send to CaseMap functionality from within LexisNexis Web sites
You can install the CaseMap v9.0 client application to a desktop that already has previous versions of CaseMap installed. It will not remove the prior version.

When prompted to enter URL for CaseMap Server (optional), please enter URL ending with CMServerClient.svc. CaseMap Server is required to work with SQL cases.

**CaseMap Server v1.0**

CaseMap Server is a set of Windows® .NET WCF Web services that authenticates CaseMap users and is used to store or retrieve data from the admin database. CaseMap Server must be installed on a local hard drive. You must be logged on with Admin rights to install CaseMap Server.

- 2 GHz or faster 32-bit (x86) or 64-bit (x64) processor
- 2 GB of RAM or greater
- Approximately 100 MB of free disk space on the system drive
- Super VGA (800 x 600) or higher-resolution monitor with 256 colors
- Any of the following versions of Microsoft Windows®:
  - Microsoft Windows 2003 Server®
  - Microsoft Windows 2008 Server®
- Any of the following versions of Internet Information Server®:
  - Microsoft IIS 6.0®
  - Microsoft IIS 7.0®
- Microsoft .NET framework v3.5 and above

The CaseMap Server requires the CaseMap Admin Database to reside in SQL Server 2005® or SQL Server 2008®. The installer will prompt you for SQL Server Credentials to create the admin database.

The CaseMap Server should only be accessible from within the secured network and any access to the CaseMap Server from Internet should be blocked.

The CaseMap Server runs under a service account that has privileges to perform LDAP queries against Active Directory and has read/write/execute permissions on the CaseMap admin database.

The CaseMap Server has two web services: one for the CaseMap client application and the other for the CaseMap Admin Console to use.

Admin Console Service Default URL: `http://[Web_Server_Name]/CMServer/CMServerAdmin.svc`

Client Application Service Default URL: `http://[Web_Server_Name]/CMServer/CMServerClient.svc`
CaseMap SQL Import Utility v1.0

The CaseMap SQL Import Utility is an administrative tool used to migrate existing case file databases from Microsoft Access to Microsoft SQL Server. The CaseMap SQL Import Utility must be installed and run on a local hard drive. CaseMap SQL Import Utility cannot be run from a network server. You must be logged on with admin rights to install CaseMap SQL Import Utility.

Each CaseMap case file database requires a distinct SQL database. After you import an Access case file into a SQL Server database, use the CaseMap Admin Console to register the case database and then assign it to users.

- 1 GHz or faster 32-bit (x86) or 64-bit (x64) processor
- 1 GB RAM (32-bit) or 2 GB RAM (64-bit)
- Approximately 30 MB of free disk space on the system drive
- Super VGA (800 x 600) or higher-resolution monitor with 256 colors
- Any of the following versions of Microsoft Windows®:
  - Microsoft Windows XP Professional or Home®
  - Microsoft Windows 2003 Server®
  - Microsoft Windows 2008 Server®
  - Microsoft Windows Vista®
  - Microsoft Windows 7®

CaseMap Admin Console v1.0

The CaseMap Admin Console is the Windows desktop application providing access to the CaseMap Server Web Service. Install the CaseMap Admin Console to the Microsoft Windows desktop of any user who will administer CaseMap SQL cases and other users. CaseMap Admin Console must be installed and run on a local hard drive. CaseMap Admin Console can not be run from a network server. CaseMap Admin Console data is stored on an Admin Database residing in Microsoft SQL Server® database. You must be logged on with Admin rights to install CaseMap Admin Console.

- 1 GHz or faster 32-bit (x86) or 64-bit (x64) processor
- 1 GB RAM (32-bit) or 2 GB RAM (64-bit)
- Approximately 30 MB of free disk space on the system drive
- Super VGA (800 x 600) or higher-resolution monitor with 256 colors
- Any of the following versions of Microsoft Windows®:
  - Microsoft Windows XP Professional or Home®
  - Microsoft Windows 2003 Server®
  - Microsoft Windows 2008 Server®
  - Microsoft Windows Vista®
  - Microsoft Windows 7®

When prompted to enter URL for CaseMap Server (optional), please enter URL ending with CMServerAdmin.svc. CaseMap Server is required to administer CaseMap.
SQL cases and respective users.

- **Review additional recommendations**

Review the following for additional information regarding recommendations.

- **Calculating user capacity**

Network connection speed, network traffic, database size, and other items may be a factor when evaluating performance. To maximize performance, the user capacity of the CaseMap Server is metered by the hardware. A Pentium CPU will support 25 users. A Xeon or Pentium Hyper Threaded (HT) CPU will support 50 users. Multiple CPU capacity for dual and quad CPU servers. Server capacity is also limited by bandwidth on your LAN and WAN, as well as file server speed.

- **Web servers**

The CaseMap Server requires a Microsoft Internet Information Server (IIS) v6.0 or v7.0 Web server. If you are installing CaseMap Server on an IIS 6 server, you will need to ensure that aspnet_isapi.dll is allowed.

![Computer Management](image)

The application pool identity must be configured for IIS by running the aspnet_regiis utility. You can do this from the command line (running as Administrator).
It must also hold the Log On As Service right in the LSA.

The CaseMap Server should only be accessible inside your protected network and requires installation to a single Windows® Server 2003 or 2008. You should not allow access to the CaseMap Server from the Internet.

Please use standard configurations for an IIS web server. The CaseMap Server web
services will use the ports that are assigned to its parent Web site in IIS. However, CaseMap and the CaseMap Admin Console expect the CaseMap Server to be on port 80 for HTTP or 443 for SSL.

- CaseMap Server supports SSL encryption. It is recommended that you require SSL connections to the CaseMap Server’s parent Web site.

**Authentication Types**

Windows Authentication logons can be used by the CaseMap Server, making user administration easy and fully integrated with your existing network policies. CaseMap Server reuses Windows credentials to authenticate a user. Once a user logs on to Windows, CaseMap Server can use that same log on so that a user does not need to re-specify their credentials.

CaseMap Server with Active Directory can be used to verify users’ logons and passwords. Logons are checked with Windows Security Controller. Setting this up helps ensure conformation with password policies.

*CaseMap Server has two authentication type options:*

- **Simple Authentication** - CaseMap handles authentication for accessing case files.

When using Windows Authentication, you will need to first set up users in the Active Directory and then add the user name to the CaseMap Admin Console. When using Windows authentication, it is important that user names match in both the Active Directory and the CaseMap Admin Console.

**Related Topics**

- What to consider for preliminary planning
- What you need to know before installation
- What is CaseMap Server

**Installing the CaseMap Server**

**Welcome to CaseMap Server**

The CaseMap® Server is a software product that provides secure, remote access to CaseMap case file databases over a Wide Area Network (WAN). CaseMap accesses the case file databases just as if they were accessing them from a local drive or server - there is no
learning curve for case staff users and generally all features work the same.

The centralized CaseMap Server offers remote access from within the WAN and the installed CaseMap software within the Local Area Network (LAN).

CaseMap v9.0 or later is required to access databases from CaseMap Server v1.0 or later. CaseMap licenses are separate from CaseMap Server.

CaseMap SQL Architecture Diagram

The above diagram shows a fictitious large organization with a WAN that spreads across multiple large offices as well as small satellite offices and VPN users. Each large office supports many users and may have its own dedicated Microsoft® SQL Server®. The main office houses the CaseMap Server application and the CaseMap administration database. CaseMap users in each office have LAN or WAN access to the CaseMap Server and can potentially access case databases that are stored on any SQL Server within the organization.

CaseMap Server components include:

- **CaseMap Server** - Each organization requires only one CaseMap Server, which needs to be accessible to all CaseMap users in the organization. The CaseMap Server should not be accessible outside of the organization (via the Internet). The CaseMap desktop application will always connect to the CaseMap Server to authenticate and gain access to available SQL case file databases.

- **CaseMap Admin SQL Server database** - Each organization requires one CaseMap administrator database, which is used to store all settings such as users, case files, database servers, preferences, etc. The CaseMap Server will be the only component to
interact with the administrator database and will require SQL read/write access to it.

- **CaseMap Admin Console** - This is the Windows user interface to the CaseMap Server. The CaseMap Admin Console allows you to perform CaseMap administrative functions such as create and register SQL databases and case files, managing users, and export case file databases to create replica copies.

- **CaseMap Client** - This is the CaseMap software application used by case staff. CaseMap logs in to the CaseMap Server to get information on case files and then connect directly to a SQL server to access a case. CaseMap also retains the optional ability to create case files in Microsoft Access databases.

- **CaseMap Case File Databases** - Case file databases can be stored on any SQL server inside the organization. Proximity and network speed will affect performance of the desktop application. Case file databases saved in Microsoft Access databases can be stored on a shared network directory folder for case staff to access the file.

CaseMap Server is server class software and requires a powerful, designated server to ensure that performance is optimal. When implementing CaseMap Server, we recommend that you invest in as many SQL Servers as needed to for optimal performance throughout your organization (that meets or exceeds what is stated in the system requirements).

**Installation involves the following processes:**

- Installing CaseMap Server
- Installing the CaseMap Admin Console
- Installing the CaseMap SQL Import Utility (optional for clients migrating existing local cases to SQL cases)
- Installing the CaseMap Client Application
- Testing with sample databases
- Verifying connectivity

**Related Topics**

- What to consider for preliminary planning
- What you need to know before installation
- What are the system requirements

**How to configure SQL for CaseMap Server**

Before you install the CaseMap Server, you need to create an admin database and login account in SQL Server Management Studio.

To configure SQL for CaseMap Server
Installing CaseMap 27

1. Open SQL Server Management Studio.

2. Connect to the database engine, using system administrator account, on the server that will contain the CaseMap Server admin database.

3. In Object Explorer, right-click on the Databases folder and click New Database.

4. In the New Database dialog box, type in AdminDatabase in the Database Name field, then click OK.

5. In the Object Explorer pane, expand the Security folder, and then expand the Logins folder.

6. Right-click on Logins folder and click New Login.

7. In the Login - New dialog box, type in the login name in the Login name field.

8. Select the authentication type you want to use: Windows or SQL.

   If you choose SQL, then type in password and confirm it.

   If you choose Windows Authentication, the login name must be the same account used for Anonymous Authentication by the CaseMap Server.

9. In the Default database field, select the AdminDatabase.

10. Click OK to continue.

    You are now ready to install CaseMap Server.

Related Topics

- What to consider for preliminary planning
- What you need to know before installation
- What is CaseMap Server
- How to install CaseMap Server

How to install CaseMap Server

Install the CaseMap Server to Windows® Server 2003 or 2008 inside your WAN. The CaseMap Server requires a Microsoft SQL Server 2005 or 2008 admin database. Creating the admin database manually is optional. If the admin database is already created, then the installer will configure it. Otherwise, the installer will create and configure the admin database. We recommend that you install the admin database SQL Server on a different machine than that of the Microsoft IIS web server.

The CaseMap Server Web Service has two web services:

- CaseMap Client (default URL) - http://[Web_Server_Name]/CMServer/CMServerClient.svc
- **CaseMap Admin Console** (default URL) - http://[Web_Server_Name]/CMServer/CMServerAdmin.svc

⚠️ The CaseMap Server is a collection of .NET WCF Web services that should only be available inside your WAN. You should block access to the CaseMap Server on the Internet.

☑️ If you plan on using Active Directory authentication for CaseMap users, then CaseMap Server requires Microsoft® Windows® service account that has privileges to perform LDAP queries against Active Directory.

### To install CaseMap Server

1. Click on the **CMServerSetup.exe** file to launch the CaseMap Server install utility.

2. When the utility launches, click **Next**.

3. In the **License Agreement** dialog box, review the license agreement and select the **I accept the terms in the license agreement** option.
4. Click the Print button if you would like a copy of the license agreement printed at this time.

5. Click Next to continue.

6. In the Information dialog box, review important installation information.
7. Click **Next** to open the **Service Account Information** dialog box.
8. In the **User Name** field, type in the user account for the IIS application pool.

9. In the **Password** field, type in the user account password.

   We recommend that you set the service account password to never expire.

10. Click **Next** to open the *Create CaseMap Server Admin Database* dialog box.

11. In the **SQL Server that you are installing to** field, type in the server name.

12. In the **Connect using** area, select the authentication type your are using: **Windows** or **SQL**.

   If you are using SQL Authentication, type in a user name and password.

13. In the **SQL database name** field, type in the admin database name.

14. Click **Next** to open the *CaseMap Server Admin Database Connection Information* dialog box.
15. In the **Connect using** area, select the authentication type you want to use: **Windows** or **SQL**.

If you are using SQL Authentication, type in a user name and password.

Refer to Step 7 in *How to configure SQL for CaseMap Server*.

16. Click **Next** to open the **Select the web site** dialog box.
17. In the **Web site** field, type in the web site you want to use.

18. In the **Application name** field, type in the server name.

19. Click **Next** to open the **Organization Name** dialog box.
20. In the **Organization or firm name** field, type in the organization or firm name.

21. Click **Next** to continue.

22. In the **Destination** dialog box, click **Next** to install to this folder or click **Change** to locate another directory folder.
23. Click to **Next** to continue.

24. In the **Ready to Install the Program** dialog box, click **Install**.
The installation wizard will install the CaseMap Server files.

25. When the **InstallShield Wizard Complete** dialog box displays, click **Finish**.
The CaseMap Server is now installed in the directory you specified.

You can now install the CaseMap Admin Console.

Related Topics

- What is CaseMap Server
- What are the system requirements
- How to configure SQL for CaseMap Server
- How to install CaseMap Admin Console

**Installing the CaseMap Admin Console**

**How to install CaseMap Admin Console**

The CaseMap Admin Console is the Windows desktop application providing user interface access for the CaseMap Server. Installation of the CaseMap Admin Console is fairly simple and done using an install wizard. Install the CaseMap Admin Console to the desktop of any user who will be administering CaseMap case files and users. The CaseMap Admin Console supports both Windows and simple authentication.
The install utility will prompt you to enter the URL to the CaseMap Server. The URL should end with "CMServerAdmin.svc".

The CaseMap Server automatically creates a system administrator user with a default user name and password:

- User Name = sysadmin
- Password = password

Once you log into the CaseMap Admin Console for the first time using the sysadmin user account you can change the default password. The sysadmin password can be modified by clicking Tools > Options.

After installing the CaseMap Admin Console, you can register one or more SQL servers inside your organization that will host your CaseMap SQL case file databases.

Once databases are registered, you can then set up the following users:

- CaseMap client users who can access SQL case file databases
- CaseMap Admin Console users who can administer case file databases and users

The CaseMap Admin Console is the only place you can create a new CaseMap SQL case file database. Once the case file is created, you can assign it to users with local or Active Directory type authentication. Use the SQL Import Utility to migrate existing CaseMap v9.0 (or earlier) case files from the Access database format to the SQL database format.

To install the CaseMap Admin Console

1. Click on the **CMAdminSetup.exe** file to launch the CaseMap Admin Console install utility.

2. When the **InstallShield Wizard** launches, click **Next**.
3. In the **License Agreement** box, select the **I accept the terms of the license agreement.**
4. Click the Print button to print a copy of the license agreement, then click Next.

5. In the Information dialog box, read important installation information, then click Next.
6. In the **Default CaseMap Server** dialog box, type in the CaseMap Server in the **Name** field.
7. In the **URL** field, type in the Server URL, then click **Next**.

8. In the **Choose Destination Location** dialog box, verify whether the default destination folder is the appropriate location.
The default folder is C:\Program Files\CaseSoft\CaseMap Admin Console.

Click the Browse button to change the destination folder and choose a different folder.

9. Click **Next** to continue.

10. In the **Start Copying Files** dialog box, review the current install settings, then click **Next**.
11. In the **InstallShield Wizard Complete** dialog box, select the **Launch the CaseMap SQL Admin Console** check box.

Select the **View the ReadMe File** check box if you want to review the file.
12. Click **Finish**.

The CaseMap Admin Console automatically launches and is ready for you to register a CaseMap Server.
13. In the CaseMap Admin Console, click the Connect button.

14. In the message box to register a CaseMap Server, click Yes.

15. In the New CaseMap Server dialog box, type in the server name in the Server Name field.

16. In the Server URL field, type in the server address.

17. Click OK to continue.

18. In the Connect to CaseMap Server dialog box, select Local User.
19. In the **User Name** field, type *sysadmin*.

20. In the **Password** field, type in *password*.

21. Click **Connect** to continue.

   The CaseMap Admin Console now opens with a connection to the registered server.

   ![CaseMap Admin Console](image)

You can now install the [SQL Import Utility](#) if you plan on migrating existing local case files to the CaseMap Server.

**Related Topics**

[What is CaseMap Server](#)

[What are the system requirements](#)

[How to install CaseMap Server](#)
Installing the SQL Import Utility

How to install the CaseMap SQL Import Utility

The CaseMap SQL Import Utility is designed to help you migrate pre-existing case files to CaseMap Server. This utility will convert case files created in CaseMap v9.0 (or earlier) that are Access database format and create new SQL case files in a SQL Server database format. Each CaseMap case file requires a distinct SQL database.

After you import an Access case file into a SQL Server database, use the CaseMap Admin Console to register the case database and then assign it to users. Once a case file is migrated to CaseMap Server, it can no longer be accessed in previous versions of CaseMap.

How to install the CaseMap SQL Import Utility

1. Click on the CMSQLImportSetup.exe file to launch the CaseMap SQL Import utility.
2. When the CaseMap SQL Import Utility launches, click Next.

![Image of the installation wizard for the CaseMap SQL Import Utility]
3. In the **License Agreement** dialog box, review the license agreement and then select **I accept the terms of the license agreement**.

If you would like to print a copy of the license agreement at this time, click the Print button.

4. Click **Next** to continue.

5. In the **Information** dialog box, review important information regarding installation, then click **Next**.
6. In the **Choose Destination Location** dialog box, verify whether the default destination folder is the appropriate location.
The default folder is C:\Program Files\CaseSoft\CaseMap SQL Import\.

Click the Browse button to change the destination folder and choose a different folder.

7. Click **Next** to continue.

8. In the **Start Copying Files** dialog box, review the current install settings, then click **Next**.
If you want to modify any settings, click the Back button.

9. In the InstallShield Wizard Complete dialog box, verify that the Launch CaseMap SQL Import Utility check box is selected.
10. Select the **View the ReadMe File** check box if you want to review the file at this time.

11. Click **Finish** to continue.

12. When the **CaseMap 9 SQL Import Utility** launches, click **Close** at this time.
If you have not already installed CaseMap, you can do so at this time: How to install CaseMap.

**Related Topics**

- What is CaseMap Server
- What are the system requirements
- How to install CaseMap Server
- What you need to know about migrating case files
- How to migrate case files to CaseMap Server
- How to register existing case files
- How to map case users

**What you need to know about migrating case files**

Previous versions of CaseMap case files are written to Microsoft® Access databases. CaseMap v9.0 also retains the option to create local case files in Access databases to save on a shared network folder. CaseMap Server allows you to import these files and convert them to a SQL case file database.

Migrating an existing case file to CaseMap Server is two-step process. First you import the existing case file using the SQL Import Utility and then register the imported CaseMap SQL
case database to the CaseMap Server using the CaseMap Admin Console. We recommend you set up CaseMap Server users with assigned roles in the CaseMap Admin Console before registering an imported CaseMap SQL case database. This process allows you to map users from the CaseMap Case Staff Member list to users defined in the CaseMap Admin Console after case registration succeeds. Once users are mapped they should automatically be assigned to the case and able to open the case in CaseMap.

For more information, see How to map case users.

- The CaseMap Server product currently manages its data through Microsoft SQL Server.

- Always backup copies of the local case files before you migrate them into CaseMap Server.

## Learn the key steps for successful case file migration

Review the following for best practices in migrating case files saved in Access databases and importing them into CaseMap Server.

- **Involve your SQL database administrator**

  The first key to a successful migration is having your organization’s SQL Database Administrator work with you in this process. Since each organization’s needs are different, the SQL environment tends to be uniquely configured. Involving your SQL Database Administrator will help save you time and effort.

  The CaseMap Technical Support team does not have knowledge of your SQL configuration and therefore, cannot answer your SQL questions. However, they can help you with your CaseMap and CaseMap Server / Admin Console questions. When calling the support team, please make sure your SQL Database Administrator is on the call to answer SQL configuration questions from support.

- **Follow steps outlined in this help topic**

  The CaseMap case file migration process was tested by CaseMap developers. For a successful migration, be sure to follow these instructions as they are written and in the order they are described.

- **Learn why you should migrate case files to CaseMap Server**

  Microsoft SQL Server is a widely available client/server relational database system. Microsoft SQL Server provides several benefits to CaseMap Server:
  - Performs transactions and atomic operations for data safety and protection
  - Runs at extremely high speeds
  - Creates little or no disk fragmentation
  - Allows for greater database size; not limited to 2 GB database size limits
  - Allows for easy management

- The CaseMap 9 SQL option has been tested against Microsoft SQL Server 2005 and
How to migrate case files to CaseMap Server

Use the LexisNexis CaseMap SQL Import Utility to migrate previous version case files to the CaseMap Server. During the import process, the utility converts a case file in an Access database format to a SQL Server database format. It creates a brand new SQL case file and copies all information from the old case file into the new one. You will also have the option to create the new case file database on a specified server instead of using an existing database. Each CaseMap case file must be converted individually; there is no batch processing method. The utility program will install to C:\Program Files\CaseSoft\CaseMap\SQL Import. No local machine registry settings are required.

The maximum limit for a case file database name is 128 characters. As a general practice, it is best not to use spaces in the database name.

Once a case file has been successfully imported to the CaseMap Server, the file extension on the previous version case file is changed to ".001" to ensure that case staff can no longer open it in CaseMap. If a case file already exists with the same name and extension, the numbers will increment to ".002" and ".003" to ensure a unique name.

- Previous versions of CaseMap are not used during the conversion process, so you can uninstall them at any time.

- Once a case file has been converted to a new version format, users can no longer access it using an older CaseMap version. We recommend that all users get new versions installed at the same time.

How to migrate case files to CaseMap Server

1. Click on the CaseMap SQL Import icon to launch the CaseMap SQL Import Utility.

2. In the CaseMap Case to Import area, click the Browse button to locate the case file you want to migrate to CaseMap Server.
3. In the **Server Name** field, type in the name of the SQL server you want to use.

4. In the **Authentication** drop-down list, select the authentication type you want to use: **Windows Authentication** or **SQL Server Authentication**.

   If you are using SQL Server Authentication, type in your user name and password.

5. In the **SQL Server Case Database** area, select whether you want to create a new SQL server case database or use an existing empty SQL database.

6. In the **Database Name** field, type in the SQL database name.

7. Click the **Import** button.

8. In the message box to verify the import, click **OK**.

The case file you imported is now ready to be registered in the CaseMap Admin Console. See To register existing SQL case files.

**Related Topics**

- How to install the SQL Import Utility
- What you need to know about migrating case files
- How to register existing case files
- How to map case users
- How to convert case files
Installing the CaseMap Client

How to install CaseMap

The CaseMap client application is installed to the Microsoft® Windows® desktop of any CaseMap user. The install utility will prompt you to enter the URL to the CaseMap Server. The URL should end with CMServerClient.svc.

CaseMap client installation overview:

- CaseMap must be installed and run on a local hard drive
- CaseMap cannot be run from a network server
- You must be logged on with administration rights to install CaseMap
- CaseMap data files can be stored on the network drive and accessed by users with access to the directory folder
- Previous version case files must be converted to open in the current CaseMap version
- DocPreviewer is downloaded as part of CaseMap

⚠️ Case files need to be converted to the current version format. Once a case file is converted, users with previous CaseMap versions cannot open the case file. We recommend you upgrade all CaseMap users one a given case file at the same time. For details, see How to convert case files.

⚠️ Installing a new version of CaseMap replaces any current installation of the Send to CaseMap plug-in for Adobe Acrobat with a new version. The new Send to CaseMap plug-in may work in earlier versions of CaseMap, though some features may be disabled. We recommend that you do not upgrade to a new version of CaseMap until you are ready to stop using earlier versions of the product and can migrate previous version case file to the current CaseMap version.

✔️ You can install the CaseMap v9.0 client application to a desktop that already has previous versions of CaseMap installed. It will not remove the prior version.

To install CaseMap

1. Double-click on the CM9Setup.exe icon to launch the CaseMap Install utility.
2. When the InstallShield Wizard launches, click Next.
3. In the **License Agreement** dialog box, click **Yes**.
Click Print if you want to print a copy of the license agreement.

4. In the **Information** dialog box, review the installation information, then click **Next**.
4. In the **Default CaseMap Server** dialog box, type in the CaseMap Server in the **Name** field.
5. In the **URL** field, type in the name of the Server URL, then click **Next**.

6. In the **Choose Destination Location** dialog box, verify whether the default destination folder is the appropriate location, then click **Next**.
The default folder is C:\Program Files\CaseSoft\CaseMap 9.

7. In the **Start Copying Files** dialog box, review the current settings, then click **Next**.
8. In the **InstallShield Wizard Complete** dialog box, select the **Yes, I launch LexisNexis CaseMap 9 now** check box.
9. Select the **Yes, I want to view the read me file now** check box, if you want to do so at this time.

10. Click **Finish**.

11. In the **Welcome to CaseMap** dialog box, select whether to run CaseMap now or activate CaseMap online.
11. Select **Activate**, then click **Continue**.

12. In the **CaseMap 9 Software Activation** dialog box, click **Next** to open the **Enter your registration information** dialog box.

13. In the **Registration Name** field, type in the user name for license registration.

14. In the **Registration ID** field, type in your registration ID.
15. In the **Product ID** field, type in the CaseMap license number.

   You must be registered with LexisNexis as a valid user of this software to have this registration information. When you register with LexisNexis you should receive this information via email or phone.

16. Click **Next** to continue.

17. In the **Read the LexisNexis License Agreement** dialog box, read the license agreement and the select the **Yes, I will abide by the LexisNexis License Agreement** check box.

18. Click **Next** to continue.

19. In the **How do you want to activate this product** dialog box, select the activation option you want to use.
20. Click Next to continue.

21. In the **Summary of online activation transmission information** dialog box, review the license registration information.

22. Click Finish to complete the activation.

23. In the message box confirming CaseMap activation, click OK.

CaseMap now automatically launches and you can begin using it.
How to register the CaseMap Server in CaseMap

If you did not register a server during CaseMap installation, you will need to register a CaseMap Server in order for users to access SQL case files in CaseMap.

To register a CaseMap Server in CaseMap

1. On the Tools menu, click Options.
2. In the Options dialog box, click the CaseMap Servers tab.
3. Click the Add button.
4. In the **New CaseMap Server** dialog box, type in the client server address in the **Server Name** field.

5. In the **Server URL** field, type in the path to the server, then click **OK**.
   
   For example: http://[Your Server Name Here]/CMServer/CMServerClient.svc.

6. Click **OK** when you are finished.
   
   The server you registered now displays in the Registered CaseMap Servers box.

---

**To edit a CaseMap Server in CaseMap**

1. On the **Tools** menu, click **Options**.

2. In the **Options** dialog box, click the **CaseMap Servers** tab.

3. In the **Registered CaseMap Servers** box, select the server you want to edit.

4. Click the **Edit** button.

5. In the **Edit CaseMap Server** dialog box, modify the server name or server URL, then
click OK.

The changes now display in the Registered CaseMap Servers box.

6. Click OK to save your changes.

To remove a registered server in CaseMap

1. On the Tools menu, click Options.

2. In the Options dialog box, click the CaseMap Servers tab.

3. In the Registered CaseMap Servers box, select the server you want to remove.

4. Click the Remove button.

5. The selected server no longer displays in the Registered CaseMap Servers box.

6. Click OK to save your changes.

Related Topics

How to install CaseMap
What you need to know about migrating case files
How to migrate case files to CaseMap Server
How to install the SQL Import Utility
How to convert local case files

CaseMap continues to allow you to convert previous version case files to the new current release version. For example, you can upgrade a CaseMap v8.0 case file to a CaseMap v9.0 case file and have it still write to an Microsoft® Access database. Use the SQL Import Utility to migrate local case files to SQL case files.

When upgrading a previous version case file to a new version, CaseMap recognizes the older case file format, such as a CaseMap v8.0 file (.cm8 extension) and offers to convert it to the new version format for you. It only takes a minute or so to convert previous case files to the new CaseMap format.

During the conversion process, CaseMap does not change anything in your existing CaseMap file. It creates a brand new case file and copies all information from the old case file into the new one. During the conversion, CaseMap changes the file extension of the older version, such as .cm8 to .001. This change keeps users from inadvertently reopening the old case file and using a previous CaseMap license.

If a case file already exists with the same name and extension, the numbers will increment to ".002" and ".003" to ensure a unique name. We recommend that you inform case staff when the import is complete and that the original case file is now renamed.

- Previous versions of CaseMap are not used during the conversion process, so you can uninstall them at any time.

- Once a case file has been converted to a new version format, users can no longer access it using an older CaseMap version. We recommend that all users get new versions installed at the same time.

To convert case files to a new CaseMap version

1. On the File menu, click Open.
2. In the Open Case dialog box, locate the previous version case file you want to convert, then click Open.
3. In the message box, review the selected case file information, then click OK.
4. In the Select the name and location of the converted case file dialog box, locate the directory where you want to save the case file, then click Save.
5. In the message box confirming case conversion, click OK.

The message box displays the directory location of the original case file and its new file extension.

The Case Logon dialog box now displays and you can open the case file in the current version of CaseMap.
How to update CaseMap versions

When you receive notification that a current version of CaseMap has an update available, you can quickly download it to ensure you have the latest tools and fixes needed for using CaseMap successfully.

IT staff and litigation support professionals should alert users when they are eligible to receive a new version of CaseMap for their licenses. The latest version can be downloaded at www.casemap.com by following the instructions for installing CaseMap.

Once you have updated CaseMap, review the What's New topic for release information detailing feature enhancements for the version you are now using.

To update CaseMap

1. Verify that the computer you are using has an active Internet connection for the update.
2. Open CaseMap on the desktop for the license holder needing the update.
4. In the CaseMap WebUpdate dialog box, click Continue.

A status screen displays the installation process for the update and then prompts you with the version installed when it completes.

If you currently have all updates installed, you receive a message indicating that you have the current version.
How to test installation

Testing the installation involves:

- Opening the CaseMap Admin Console
- Opening SQL case file in the CaseMap client

CaseMap needs to be installed before you can open the SQL case file.

To open the CaseMap Administration Console

1. Launch the CaseMap Admin Console.
2. In the Connect to CaseMap Server dialog box, type in or select the server you want to connect to in the Server Name field.

3. In the Authentication area, select the authentication method you want to use: Windows Authentication or Local User.
   
   If you select Local User, type in the User Name and Password.

4. Click Connect.
   
   You can now view the CaseMap Admin Console where you can register and publish case files, add users, etc.

To open a SQL case file

1. Launch CaseMap.
2. On the File menu, click Open SQL Case.
3. In the Select a SQL Case to Open dialog box, select the SQL case you want to use, then click Open.
4. Verify that the case name displays in the upper left corner of CaseMap's title bar. If you can view case records in spreadsheets and open an attached file, the installation was successful.

5. When the **Case Jumpstart Wizard** launches, click **Cancel** at this time.

### Related Topics

- **How to verify connectivity**

### How to verify connectivity

Reference the Connectivity Checklist to ensure that you have completed all necessary steps to ensure connectivity channels for servers, databases, and users.

#### To verify connectivity

Reference the Connectivity Checklist to ensure that you have completed all necessary steps to ensure connectivity channels for SQL servers, SQL case files, and users.
## Checklist: Connectivity

<table>
<thead>
<tr>
<th>Task</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Servers</strong></td>
<td></td>
</tr>
<tr>
<td>□ Is CaseMap Server installed?</td>
<td></td>
</tr>
<tr>
<td>□ Is the CaseMap Administration Console installed?</td>
<td></td>
</tr>
<tr>
<td>□ Did you remember to set up an admin database and a valid system administrator account in SQL Management Studio first?</td>
<td></td>
</tr>
<tr>
<td><strong>Case Files</strong></td>
<td></td>
</tr>
<tr>
<td>□ Did you register your case files in the CaseMap Administration Console?</td>
<td></td>
</tr>
<tr>
<td>□ Did you associate your case files to SQL cases and SQL Servers so that CaseMap can access it?</td>
<td></td>
</tr>
<tr>
<td>□ Have you implemented the necessary web server address restrictions?</td>
<td></td>
</tr>
<tr>
<td><strong>Users</strong></td>
<td></td>
</tr>
<tr>
<td>□ Do you have users associated to SQL case files?</td>
<td></td>
</tr>
<tr>
<td>□ Does each user have a valid user ID and password, and does it match for Active Directory?</td>
<td></td>
</tr>
<tr>
<td>□ Have you enabled user accounts in the CaseMap Admin Console?</td>
<td></td>
</tr>
<tr>
<td>□ Have you assigned user accounts to roles and SQL case files?</td>
<td></td>
</tr>
<tr>
<td>□ Do you have a CaseMap license for each user who need to access case files?</td>
<td></td>
</tr>
<tr>
<td>□ Have you installed CaseMap locally for each user?</td>
<td></td>
</tr>
</tbody>
</table>

### Related Topics

- How to test installation