# LexisNexis CaseMap-WorkSite Plug-In ReadMe

Version Number 2.0 (Build 1)
ReadMe updated March 27, 2007

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

## CONTENTS

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

Please note, Interwoven, Inc. acquired iManage in 2003.  The iManage WorkSite, DeskSite, and FileSite (formerly MailSite) line of products are now owned and supported by Interwoven, http://www.interwoven.com.

The current version of these products is 8.2 (as of March 2007).  They are referred to as Interwoven WorkSite Server, Interwoven DeskSite, and Interwoven FileSite.

The CaseMap-WorkSite Plug-In is developed and supported by LexisNexis CaseMap, http://www.casesoft.com.  Please contact LexisNexis CaseMap technical support with any question or issues with using the plug in.  904-273-5000 (M-F 0900-1800 ET).

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

## 1. System Requirements

To send one document at a time to CaseMap, you must have CaseMap 4.5 or later installed on the machine where you are installing this plug-in.  To send multiple, or bulk send, documents to CaseMap, you must have CaseMap 7.0 or later.

A compatible version of an Interwoven WorkSite client application must also be installed on the computer where you are installing this plug-in.

The CaseMap-WorkSite Plug-In is compatible with the following WorkSite client applications.

  -iManage DeskSite 6.0 - 6.6
  -Interwoven DeskSite 8.x
  -iManage MailSite 3.x

-iManage MailSite 4.x
-Interwoven MailSite 8.x
-Interwoven FileSite 8.x

*******************************

## 2. Installing CaseMap-WorkSite Plug-In

On Windows NT, 2000, XP and Vista, you must be logged on with administrative rights to install this plug-in.

Before installing this plug-in, you must first install one of the compatible WorkSite client applications listed above.

Make sure you close any open copies of DeskSite or FileSite / Microsoft Outlook before proceeding with the installation.

The plug-in installation adds CaseMap integration menu items to the installed WorkSite client applications listed above.  If you later change the installation of a WorkSite client application, you will likely have to reinstall this plug-in for the plug-in's menu items to appear in the WorkSite client application.

*******************************

## 3. Uninstalling CaseMap-WorkSite Plug-In

To uninstall this plug-in go to Add/Remove Programs in the Windows Control Panel and select "LexisNexis CaseMap-WorkSite Plug-In" from the list. The uninstall will remove the menu items the installation added.

*******************************

## 4. Using CaseMap-WorkSite Plug-In

When the plug-in is installed, you will notice a CaseMap menu item on the Document submenu in DeskSite.  The CaseMap menu item also appears on the document context popup menu in both DeskSite and FileSite.  The document context menu appears when you right mouse click on a document in DeskSite and FileSite.  The CaseMap menu item should appear just below the Send menu item.

The CaseMap menu item has five submenu item commands:
1. Send Document to CaseMap - New
2. Send Document to CaseMap - Update
3. Show Linked CaseMap Record Detail
4. Go To Linked CaseMap Record
5. Bulk Send Selected Documents to CaseMap

Before using any of the commands, you should open a CaseMap case you would like to link one or more documents to.  The first four commands only work with a single document selected in DeskSite or FileSite.  If you have more than one document selected these command menu items will be disabled.

### 4.1. Send Document to CaseMap - New Command

This command will create a new Object or Authority record in the current CaseMap case.  The plug-in will automatically set the new CaseMap record's linked file to link to the selected WorkSite document in DeskSite or FileSite.  You can later open the linked WorkSite document from CaseMap.

### 4.2. Send Document to CaseMap - Update Command

This command will update the selected Object, Authority, or Extract record in the current CaseMap case.  The plug-in will automatically set the CaseMap record's linked file to link to the selected WorkSite document in DeskSite or FileSite.  You can later open the linked WorkSite document from CaseMap.

### 4.3. Show Linked CaseMap Record Detail Command

This command will open the CaseMap record detail form in DeskSite or FileSite containing the data for the CaseMap record linked to the selected WorkSite document.

### 4.4. Go To Linked CaseMap Record Command

This command will bring CaseMap to the foreground and locate and select the record that is linked to the selected WorkSite document.

### 4.5. Bulk Send Selected Documents to CaseMap Command

This command will initiate the Bulk Send wizard, enabling you to send all of the currently selected documents into CaseMap.  The Bulk Send will create a CaseMap Document record for each selected document in WorkSite, automatically setting each record's linked file to link to the appropriate document in WorkSite.

(NOTE: CaseMap 7.0 or higher must be installed on the same computer as the plug-in for the Bulk Send feature to function correctly.)

| Description | Doc. Num | Ver... | Author | Class | Edit Date |
|---|---|---|---|---|---|
| 07663 | 29 | 1 | SUPPORT | DOC | 02/16/2007 |
| 07697 | 28 | 1 | SUPPORT | DOC | 02/15/2007 |
| 051 | 27 | 1 | SUPPORT | DOC | 02/13/2007 |
| 050 | 26 | 1 | SUPPORT | DOC | 02/13/2007 |
| Tes | 36 | 1 | SUPPORT | DOC | 06/01/2006 |
| Tes | 740 | 1 | SUPPORT | DOC | 05/31/2006 |
| Tes | 521 | 1 | SUPPORT | DOC | 05/15/2006 |
| Tes | 153 | 1 | SUPPORT | DOC | 05/15/2006 |

Open                Ctrl+O
Print
View
QuickView            Ctrl+Q
Setup Relation…

CaseMap              ▶      Send Document to CaseMap - New
Send Document               Send Document to CaseMap - Update
Send Nrl/Url         ▶
Check Out…                  Show Linked CaseMap Record Detail
Check in…                   Go To Linked CaseMap Record
Export…                     Bulk Send Selected Documents to CaseMap

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

### 5. Setting Up Default Bulk Send Mappings

We have created a way for administrators to set up default field mappings for a particular WorkSite database so that individual users do not need to worry about modifying field mappings each time they work with a new WorkSite database.

The plug-in loads the mappings from a file named for the WorkSite database plus a file extension of .cmbulkmap.  The path to these files is determined by a setting stored in the following registry key:

HKEY_LOCAL_MACHINE\SOFTWARE\CaseSoft\CaseMap-WorkSite Plug In

with a value name of MappingsPath.  During the install of the plug-in, the path is set in the install INI and then stored in the registry.

To set this registry value on install, do the following:
1.  Download and save the installation package.
2.  Run the following command-line:

<Path to setup package>\<Name of setup package>.exe -extract_all:"<path to extract to>"

3.  It should only show an hourglass briefly.  Once extracted, there will be a Disk1 folder in the specified path.
4.  Open the Disk1 folder and then open the _setup.ini file.
5.  In the [SETUP] section, set the value of MAPPINGSPATH to the desired path.

   [SETUP]
   MAPPINGSPATH=C:\MyPath

6.   Save the changes to _setup.ini.
7.   When installing, run the Setup.exe from the Disk1 folder.

The user can send documents from more than one WorkSite database at once. The plug-in will look for a default mappings file in the specified path for each database from which documents are being sent.  So, if DB1, DB2 and DB3 were three WorkSite databases, then there could be three files stored in the mappings path called DB1.cmbulkmap, DB2.cmbulkmap and DB3.cmbulkmap.

If a matching file is found, then the mappings will be loaded from that file.  If not, then the default field mappings are loaded, which are:

   WorkSite Description field maps to the CaseMap Full Name field
   WorkSite Comment field maps to the CaseMap Description field

No error messages will be displayed if the plug-in cannot find the mappings path or particular file.  The loaded mappings are reflected in the Bulk Send wizard.

   To save default mappings for a database, do the following:

   1.   Open a case in CaseMap.
   2.   Select one or more documents in DeskSite or FileSite.
   3.   Right-click on one of the selected documents, go to CaseMap -> Bulk Send Selected Documents to CaseMap.
   4.   Choose Yes to modify the field mappings.  Click Next.
   5.   Verify the selected CaseMap case.  Click Next.
   6.   If necessary, click on the tab for the desired WorkSite database.
   7.   Click the Modify button.
   8.   Make any desired changes to the field mappings.
   9.   Click the Options button at the bottom left and choose "Save Mappings to File…".
   10.  Browse to the path specified at the time of installation.
   11.  Name the file with the name of the database.  It must match exactly, except that it is not case-sensitive.
   12.  Click Save.

Your mappings are saved regardless of whether or not you choose to continue with sending the documents to CaseMap.

********************************

**6. Export Selected Linked Documents (in CaseMap)**

This command allows you to get a local copy of each of the WorkSite documents in the current CaseMap spreadsheet.  This will enable you to later open that local copy of a linked file when you are not connected to the WorkSite Server.

This command is enabled after any document is sent from DeskSite to a CaseMap case, thus registering a File Viewer in that case.

The step-by-step instructions are as follows:

1. In CaseMap, navigate to the 'Objects - Documents' or 'All Objects' spreadsheet.
2. Go to the menu: Tools -> Linked Files -> Batch Processing -> WorkSite.
3. Select "Export Selected Linked Documents".
4. The system will show a descriptive message dialog:  "Use this option when you want to be able to access your WorkSite documents from CaseMap while you are working offline.  CaseMap will initiate an export of all of the linked WorkSite documents in the current spreadsheet to the local echo folder."
5. System displays "Batch Processing" dialog.  Click OK
6. System preprocesses each document in the list to make sure it is valid.  If there are any documents that could not be found (e.g., because they are no longer visible in WorkSite), you will be notified and given the opportunity to view an error log.
7. You will then be prompted to continue with the export.
8. The system then displays its Export dialog. Please check the "Echo" checkbox and the "Apply to all documents" checkbox and click OK.