

CaseMap Server Installation Guide

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- **System Requirements v1.5**
- **What's New in Version 1.5**
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- **Installing the CaseMap SQL Import Utility**
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CaseMap Server Installation Guide

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CaseMap®
DocPreviewer™
TextMap®
CaseMap® Server

Version: CaseMap® Server 1.0 and 1.5, CaseMap® Admin Console 1.0 and 1.5, CaseMap® SQL Import Utility 1.0,
TextMap® SQL Import Utility
Release: March 14, 2011

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CaseMap Server Installation Guide

Installing CaseMap Server

Chapter

1

Installing CaseMap Server

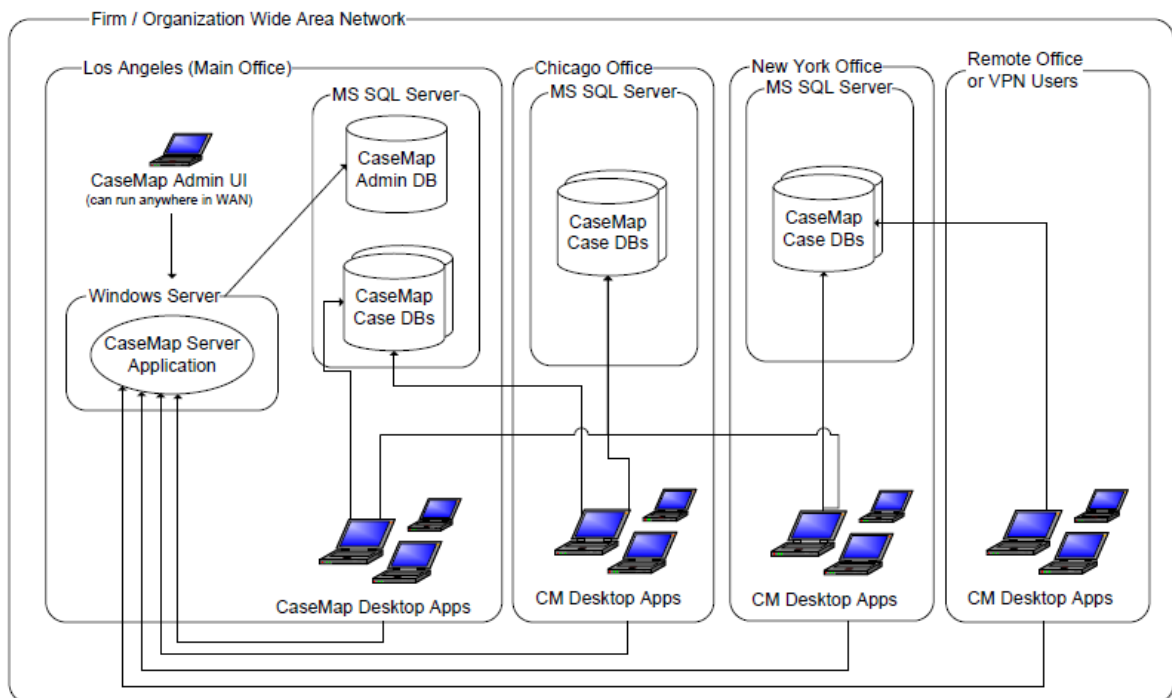
About CaseMap Server

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

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

CaseMap v9.0+ is required to access databases from CaseMap Server v1.0+. TextMap v6.0+ is required to access databases from CaseMap Server v1.5. CaseMap and TextMap 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 and/or TextMap administration databases. CaseMap and TextMap 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.

- ✍ The above diagram shows how CaseMap connects to CaseMap Server. TextMap connects to the CaseMap Server in a similar manner.

CaseMap Server components include:

- **CaseMap Server** - Each organization requires only one CaseMap Server, which needs to be accessible to all CaseMap and TextMap users in the organization. The CaseMap Server should not be accessible outside of the organization (via the Internet). The CaseMap and TextMap desktop applications will always connect to the CaseMap Server to authenticate and gain access to available SQL case 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 Server 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 and TextMap administrative functions such as creating and registering SQL databases and case files, managing users, and export case file databases to create replica copies.
- **CaseMap Client** - The CaseMap software application is used by case staff. CaseMap logs in to the CaseMap Server to get information on case files and then connects directly to a SQL Server to access a case. CaseMap also retains the optional ability to create cases in Microsoft Access databases.
- **TextMap Client** - The TextMap software application is used by case staff. TextMap logs in to the CaseMap Server to get information on cases and then connects directly to a SQL Server to access a case. TextMap also retains the optional ability to create cases 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 databases saved in Microsoft Access databases can be stored on a shared network directory folder for case staff to access the file.
- **TextMap 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 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 for optimal performance throughout your organization (that meet or exceed what is stated in the system requirements).

Installation involves the following processes:

- Installing CaseMap Server
- Installing the CaseMap Admin Console
- Installing the CaseMap or TextMap SQL Import Utility (optional for clients migrating existing local cases to SQL cases)
- Installing the CaseMap or TextMap client application

- Testing with sample databases
- Verifying connectivity

Related Topics

- [System requirements v1.0](#)
- [System requirements v1.5](#)
- [What's New in Version 1.5](#)

System requirements v1.0

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 TextMap recommendations.

Please keep informed of CaseMap Server, CaseMap Admin Console, and CaseMap/TextMap SQL Import Utility release updates and how they impact your system by checking our Web site at <http://www.lexisnexis.com/casemap/textmap.aspx?content=downloads>.

- ✎ 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.

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 Microsoft IIS 7.0®
- Microsoft .NET Framework v3.5 and above

- ✎ The CaseMap Server requires CaseMap SQL case databases to reside in Microsoft SQL Server 2005, Service Pack 2 or higher, or SQL Server 2008.

- ✎ The CaseMap Server requires the TextMap 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 TextMap admin database.
- ✎ The CaseMap Server has two web services: one for the TextMap 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 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. The CaseMap Admin Console must be installed and run on a local hard drive. The 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 the 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 an URL for CaseMap Server (optional), please enter an URL ending with CMServerAdmin.svc. The CaseMap Server is required to administer CaseMap SQL cases and respective users.

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. The CaseMap SQL Import Utility cannot be run from a network server. You must be logged on with admin rights to install the CaseMap SQL Import Utility.

Each CaseMap case requires a distinct SQL database. After you import an Access case into a SQL Server database, use the CaseMap Admin Console to register the case 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
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- Any of the following versions of Microsoft Windows®:
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 - Microsoft Windows 2003 Server®
 - Microsoft Windows 2008 Server®
 - Microsoft Windows Vista®
 - Microsoft Windows 7®

[Review additional recommendations](#)

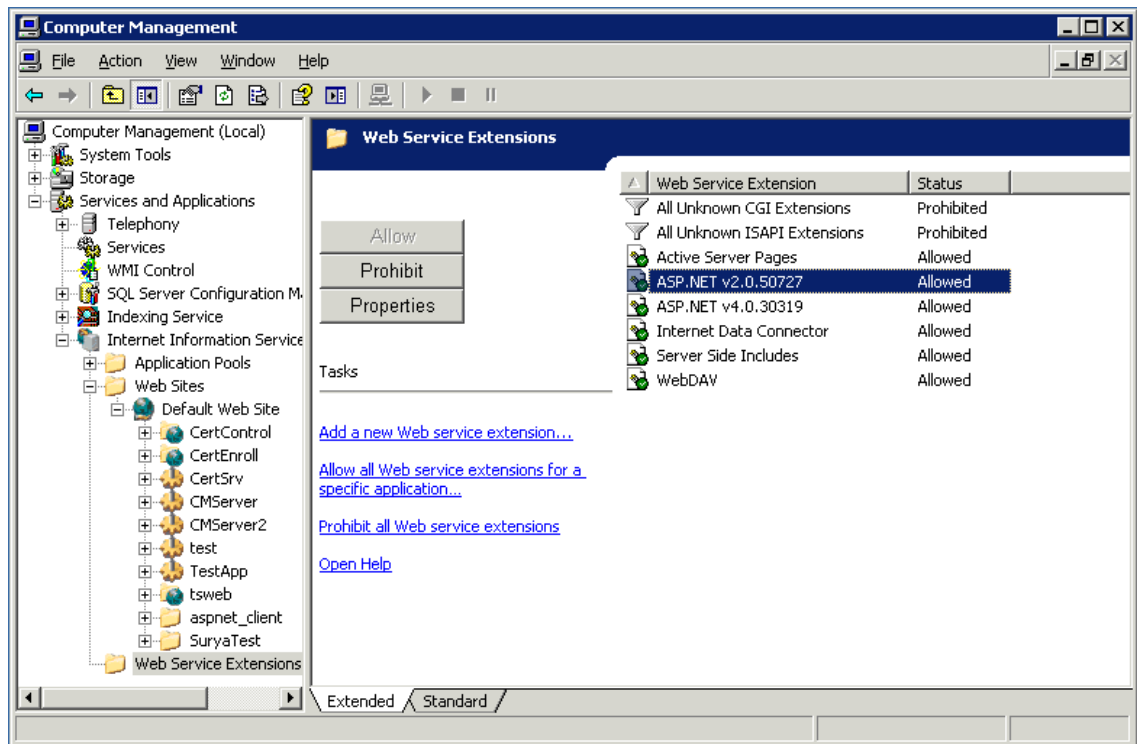
Review the following for additional information regarding recommendations.

[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.



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).

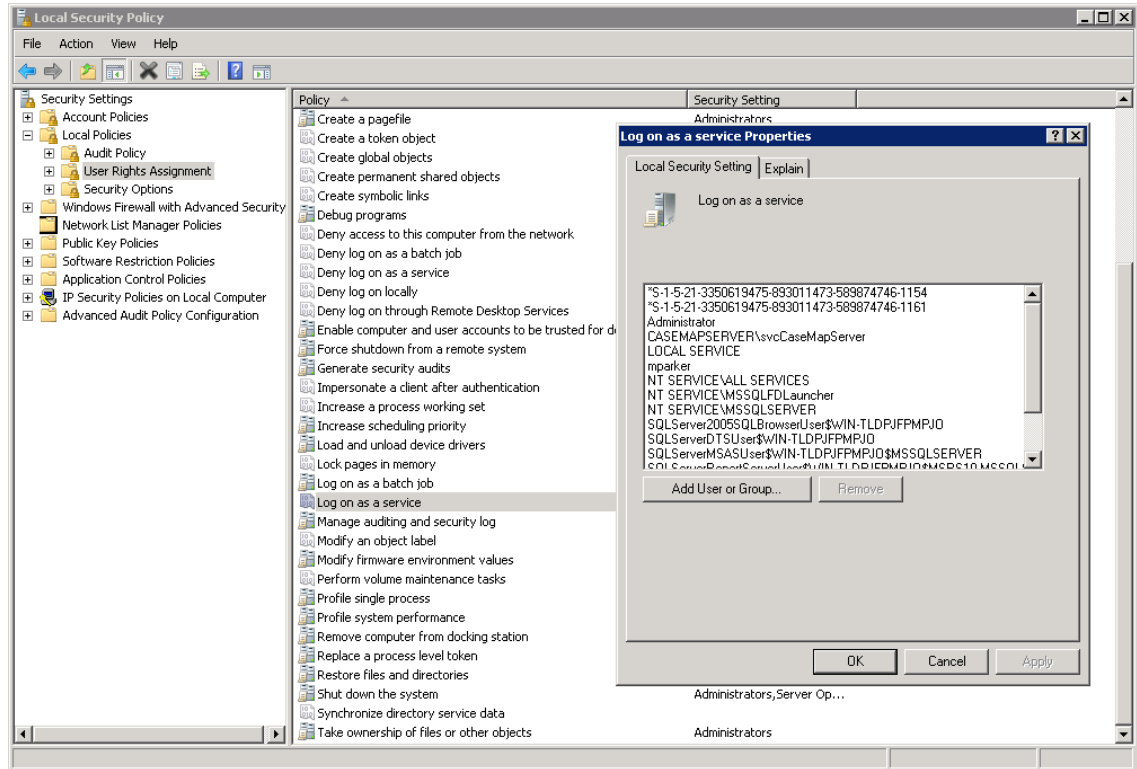
```

Administrator: Command Prompt
Microsoft Windows [Version 6.1.7600]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Windows\system32>cd\
C:\>cd Windows\Microsoft.NET\Framework\v2.0.50727
C:\Windows\Microsoft.NET\Framework\v2.0.50727>aspnet_regiis /GA svcCaseMapServer
Start granting svcCaseMapServer access to the IIS metabase and other directories
used by ASP.NET.
Finished granting svcCaseMapServer access to the IIS metabase and other director
ies used by ASP.NET.
C:\Windows\Microsoft.NET\Framework\v2.0.50727>_

```

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.

Configure the Webconfig file to support SSL

If the hosting web site of the CaseMap Server does not have an SSL binding in Microsoft IIS, the SSL endpoints will need to be modified.

To enable support for SSL

For your convenience, we have already included the necessary elements in the web.config to support SSL. However, these configuration values are commented by default. To enable support for SSL, you will need to uncomment some values in the Web.config file.

1. Locate the following:

```
<!-- SSL Support
<bindings>
  <basicHttpBinding>
    <binding name="SecurityByTransport">
      <security mode="Transport">
        <transport clientCredentialType="None"/>
      </security>
    </binding>
  </basicHttpBinding>
</bindings>
-->
```

2. Change Step 1 to the following:

```
<!-- SSL Support -->
<bindings>
  <basicHttpBinding>
    <binding name="SecurityByTransport">
      <security mode="Transport">
        <transport clientCredentialType="None"/>
      </security>
    </binding>
  </basicHttpBinding>
</bindings>
```

3. Next locate the following:

```
<!-- SSL Endpoint
  <endpoint address="" binding="basicHttpBinding"
bindingConfiguration="SecurityByTransport" contract="LexisNexis.CMServer.
WebServices.ICMServerClient"/>
-->
```

4. Change Step 3 to the following:

```
<!-- SSL Endpoint -->
```

```
<endpoint address="" binding="basicHttpBinding"
bindingConfiguration="SecurityByTransport" contract="LexisNexis.CMServer.
WebServices.ICMServerClient"/>
```

- Now locate the following:

```
<!-- SSL Endpoint

<endpoint address="" binding="basicHttpBinding"
bindingConfiguration="SecurityByTransport" contract="LexisNexis.CMServer.
WebServices.ICMServerAdmin"/>
```

```
-->
```

- Change Step 5 to the following:

```
<!-- SSL Endpoint -->

<endpoint address="" binding="basicHttpBinding"
bindingConfiguration="SecurityByTransport" contract="LexisNexis.CMServer.
WebServices.ICMServerAdmin"/>
```

To enable support for debugging

To enable support for debugging, you will need to uncomment some values in the Web.config file.

- Locate the following text:

```
<!-- Debugging Support

<compilation debug="true"/>

<customErrors mode="Off" >

-->
```

- Change the text in Step 1 to the following:

```
<!-- Debugging Support -->

<compilation debug="true"/>

<customErrors mode="Off" >
```

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:

- **Windows Authentication (External by LDAP)** - Authentication by Lightweight Directory Access Protocol (Active Directory) for accessing SQL case files in CaseMap Server.
- **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

[CaseMap Server system requirements v1.5](#)

CaseMap system requirements

TextMap system Requirements

System requirements v1.5

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 TextMap recommendations.


Please keep informed of CaseMap Server, CaseMap Admin Console, and CaseMap/TextMap SQL Import Utility release updates and how they impact your system by contacting your CaseMap Sales or Support Representative.


- ✍ When setting up users for local cases, ensure that all users have full network access to each case directory they 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 they need access.


[CaseMap Server v1.5](#)


CaseMap Server is a Windows® .NET WCF Web service 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 Microsoft Internet Information Server®
 - Microsoft Windows Microsoft IIS 6.0®
 - Microsoft Windows Microsoft IIS 7.0®
- Microsoft .NET Framework v3.5 and above


 The CaseMap Server requires CaseMap SQL case databases to reside in Microsoft SQL Server 2005, Service Pack 2 or higher, or SQL Server 2008.

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

 Service Broker must be enabled in Microsoft SQL Server for databases that get created when new TextMap SQL cases are created or registered in the CaseMap Admin Console. Enabling Service Broker ensures indexing success when transcripts are imported into a SQL case file. If Service Broker is disabled, indexing and re-indexing will not occur during import or case creation. See [Configuring SQL Server Service Broker](#).

 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 TextMap admin database.

 The CaseMap Server has two web services: one for the TextMap client application and the other for the CaseMap Admin Console to use.
Admin Console Service Default URL: `http://[Web_Server_Name]/CMServer/
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Client Application Service Default URL: `http://[Web_Server_Name]/CMServer/
CMServerClient.svc`


CaseMap Admin Console v1.5

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 TextMap SQL cases and other users.

The CaseMap Admin Console must be installed and run on a local hard drive. The CaseMap

Admin Console can not be run from a network server. CaseMap Admin Console data is stored on an Admin Database residing in a Microsoft® SQL Server® database. You must be logged on with Admin rights to install the CaseMap Admin Console.

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

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. The CaseMap SQL Import Utility cannot be run from a network server. You must be logged on with admin rights to install the CaseMap SQL Import Utility.

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

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 - Microsoft Windows 2008 Server®
 - Microsoft Windows Vista®
 - Microsoft Windows 7®

TextMap SQL Import Utility v1.0

The TextMap SQL Import Utility is an administrative tool used to migrate existing case file databases from Microsoft Access to Microsoft SQL Server. The TextMap SQL Import Utility

must be installed and run on a local hard drive. TextMap SQL Import Utility cannot be run from a network server. You must be logged on with admin rights to install the TextMap SQL Import Utility.

Each TextMap case 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 and then assign it to users.

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- 1 GB RAM (32-bit) or 2 GB RAM (64-bit)
- Approximately 30 MB of free disk space on the system drive
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Review additional recommendations

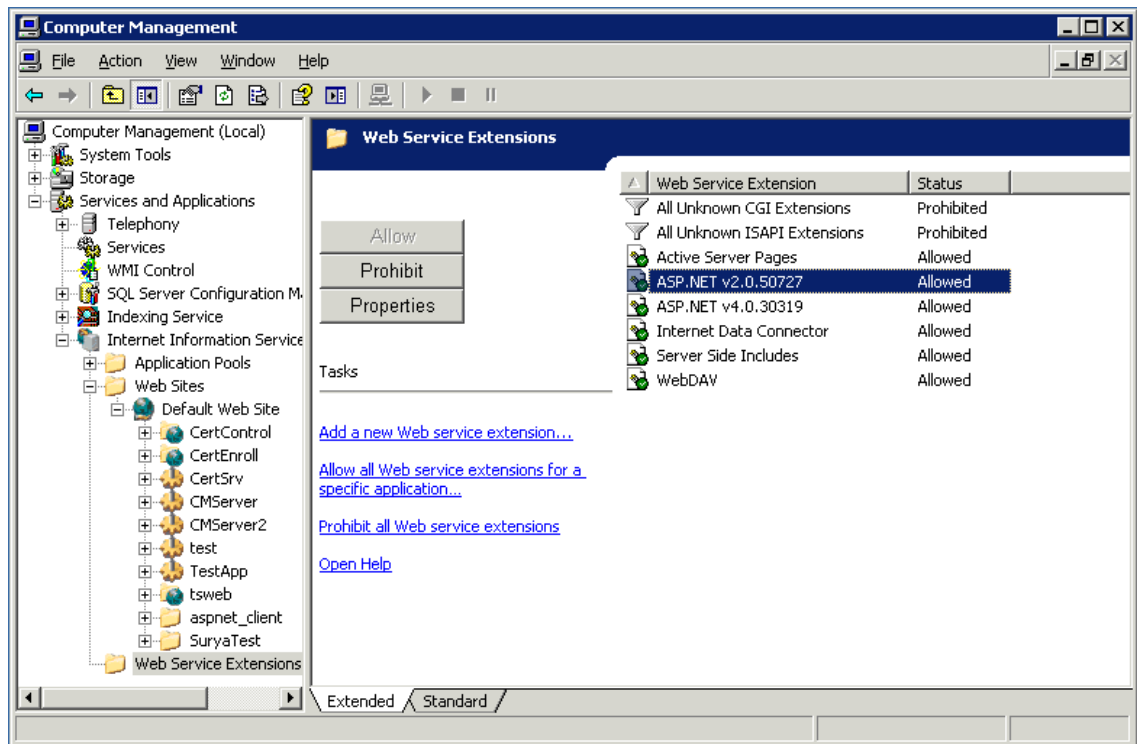
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Web Servers

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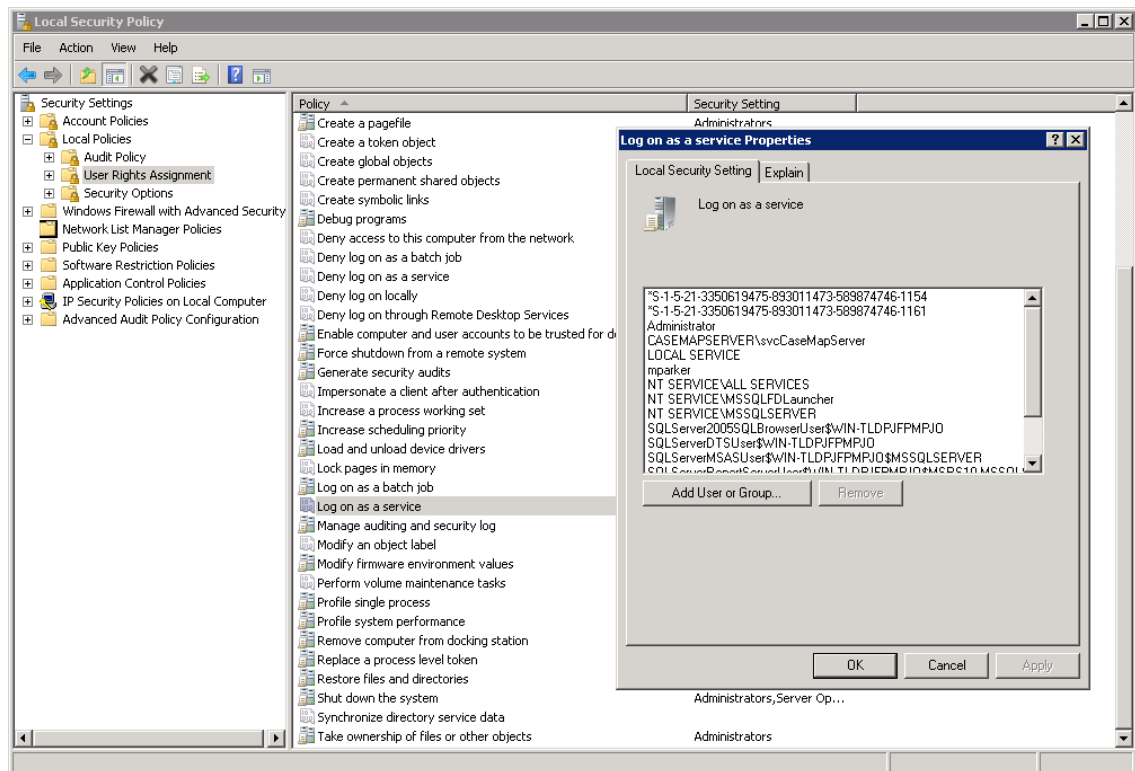
```

Administrator: Command Prompt
Microsoft Windows [Version 6.1.7600]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Windows\system32>cd\
C:\>cd Windows\Microsoft.NET\Framework\v2.0.50727
C:\Windows\Microsoft.NET\Framework\v2.0.50727>aspnet_regiis /GA svcCaseMapServer
Start granting svcCaseMapServer access to the IIS metabase and other directories
used by ASP.NET.
Finished granting svcCaseMapServer access to the IIS metabase and other director
ies used by ASP.NET.
C:\Windows\Microsoft.NET\Framework\v2.0.50727>_

```

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.

Configure the WebConfig file to support SSL

If the hosting web site of the CaseMap Server does not have an SSL binding in Microsoft IIS, the SSL endpoints will need to be modified.

To enable support for SSL

For your convenience, we have already included the necessary elements in the web.config to support SSL. However, these configuration values are commented by default. To enable support for SSL, you will need to uncomment some values in the Web.config file.

1. Locate the following:

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<!-- SSL Support
<bindings>
  <basicHttpBinding>
    <binding name="SecurityByTransport">
      <security mode="Transport">
        <transport clientCredentialType="None"/>
      </security>
    </binding>
  </basicHttpBinding>
</bindings>
-->
```

2. Change Step 1 to the following:

```
<!-- SSL Support -->
<bindings>
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    <binding name="SecurityByTransport">
      <security mode="Transport">
        <transport clientCredentialType="None"/>
      </security>
    </binding>
  </basicHttpBinding>
</bindings>
```

3. Next locate the following:

```
<!-- SSL Endpoint

  <endpoint address="" binding="basicHttpBinding"
bindingConfiguration="SecurityByTransport" contract="LexisNexis.CMServer.
WebServices.ICMServerClient"/>

-->
```

4. Change Step 3 to the following:

```
<!-- SSL Endpoint -->
```

```
<endpoint address="" binding="basicHttpBinding"
bindingConfiguration="SecurityByTransport" contract="LexisNexis.CMServer.
WebServices.ICMServerClient"/>
```

- Now locate the following:

```
<!-- SSL Endpoint

<endpoint address="" binding="basicHttpBinding"
bindingConfiguration="SecurityByTransport" contract="LexisNexis.CMServer.
WebServices.ICMServerAdmin"/>
```

```
-->
```

- Change Step 5 to the following:

```
<!-- SSL Endpoint -->

<endpoint address="" binding="basicHttpBinding"
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```

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To enable support for debugging, you will need to uncomment some values in the Web.config file.

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-->
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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:

- **Windows Authentication (External by LDAP)** - Authentication by Lightweight Directory Access Protocol (Active Directory) for accessing SQL case files in CaseMap Server.
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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

[CaseMap server system requirements v1.0](#)

CaseMap system requirements

TextMap system Requirements

What's New in Version 1.5

The CaseMap Server and CaseMap Admin Console products have been enhanced to serve both CaseMap and TextMap users.

[Create SQL cases for TextMap](#)

TextMap v6.0 users now have the ability to create SQL case files using the CaseMap Server and CaseMap Admin Console. A TextMap SQL Import Utility helps convert existing local case files from previous TextMap versions to the new Microsoft® SQL Server® format.

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

[Add new users while mapping users in SQL cases](#)

The CaseMap Admin Console now allows you to add new users while you are mapping users in a new registered SQL case.

For more information, see Mapping Users and To register an existing SQL case.

[Create SQL cases from CaseMap templates](#)

CaseMap users can now create new SQL cases from a CaseMap SQL case template in the CaseMap Admin Console. Case users and issues from the template will be copied into the new SQL case file, in addition to user's spreadsheet views, saved searches, and case/form preferences.

For more information, see [Configuring SQL Server for CaseMap templates](#) and Creating SQL cases from CaseMap templates.

Manage TextMap SQL case Ignore Words

The CaseMap Server Properties dialog box now has an Ignore Words tab so TextMap users can manage the Ignore Words for SQL cases.

For more information, see [Accessing CaseMap Server properties](#).

Review updates to the New SQL Case dialog box

The New SQL Case dialog box now accommodates creating CaseMap or TextMap SQL cases. Changes were made to the dialog box to reflect enhancements related to the client application you are using. If you are creating new CaseMap SQL cases, the dialog box now includes a Template Name field for you to select either the default template or a custom case template. If you are creating a TextMap SQL Case, the dialog box now include a Folder field for you to set the path to import exhibit files.

Additionally general improvements were made to the New SQL Case dialog box. If there is only one SQL Server registered, the server automatically populates the SQL Server field. If there is more than one registered SQL Server, the last server used automatically populates the SQL Server field. When typing in the case name, the Database Name field automatically populates with the case name and removes any invalid name characters or spaces. You can edit the Database Name entry if necessary.

For more information, see [Managing SQL cases](#).

Open SQL cases from the command line

The CaseMap Server now allows users to open CaseMap and TextMap SQL cases via command line support. You must first have case portal web pages set up where you can post hyperlinks to the SQL cases, in addition to any local cases or exported case data you want available such as a case issue list or cast of characters.

Case users can create shortcuts on their desktops or save hyperlinks as Favorites in their Internet browser to open case file assigned to them. The CaseMap and TextMap applications will launch from the web portal page. You can determine options for whether the client application splash screen displays or whether a user logon is required before the case can be opened.

For more information, see [Opening SQL cases from the command line](#).

Automate the client connection with CaseMap Server

Using command line parameters, you can automate the logon connection of the CaseMap and TextMap client applications to the default CaseMap Server using Windows authentication.

The command line parameter can be configured to automate the CaseMap Server logon dialog box. This set up can be used in conjunction with the ability to open a SQL case in CaseMap or TextMap using command line parameters.

For more information, see [Automating the client connection with the CaseMap Server](#).

Bulk import users from Active Directory groups

The CaseMap Admin Console now allows administrators the ability to bulk import CaseMap Server users from an Active Directory group. Using the Import Users Wizard, you can search for individuals by domain group, but you can also run common queries to locate a specific group. Once users are verified in Active Directory, the wizard allows you the option of assigning them to roles already created in the CaseMap Admin Console. Users imported into the CaseMap Admin Console will display on the Users pane. Each user's name, type, user name, and email is automatically imported during this process.

For more information, see [Creating users](#).

Upgrade previous admin databases to CaseMap Server v1.5

The CaseMap Server installation program now upgrades administrator databases from the CaseMap v9.0 / CaseMap Server v1.0 release to the current schema for the TextMap 6.0 / CaseMap Server v1.5 release. This allows administrators who have already installed the CaseMap Server to upgrade their installation to support TextMap SQL cases.

Related Topics


[About CaseMap Server](#)

[System requirements v1.5](#)

Installing the CaseMap Server

Configuring SQL Server for CaseMap Server

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

 Any time you uninstall/reinstall CaseMap Server, you will need to create a new admin database and login accounts in SQL Server Management Studio.

To configure SQL for CaseMap Server

1. Open **Microsoft SQL Server**.
2. Connect to the database engine, using a 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 the name of the admin database 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 a 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 admin database you created.
10. Click **OK** to continue.

You are now ready to install [CaseMap Server](#).

Related Topics

[About CaseMap Server](#)

[Installing CaseMap Server](#)

Registering SQL Servers

[Configuring SQL Server for CaseMap templates](#)

Configuring SQL Server Service Broker

Service Broker must be enabled in Microsoft® SQL Server for databases created when new TextMap SQL cases are created or registered in the CaseMap Admin Console. Enabling Service Broker ensures indexing success when transcripts are imported into a SQL case file. If Service Broker is disabled, indexing and re-indexing will not occur during import or case creation.

When new TextMap SQL cases are created, the new case will have Service Broker enabled. However, if a database administrator restores a SQL database, the restored SQL database will have Server Broker disabled. After a SQL database is restored from a backup, database administrators need to enable Service Broker for the database.

[To check the status of Service Broker](#)

```
SELECT is_broker_enabled FROM sys.databases WHERE name = 'Database name'
```

A value of 0 indicates it is off, 1 is on.

☐ **To enable Service Broker**

Alter Database [DB_NAME] Set ENABLE_BROKER

Related Topics

[System requirements v1.5](#)

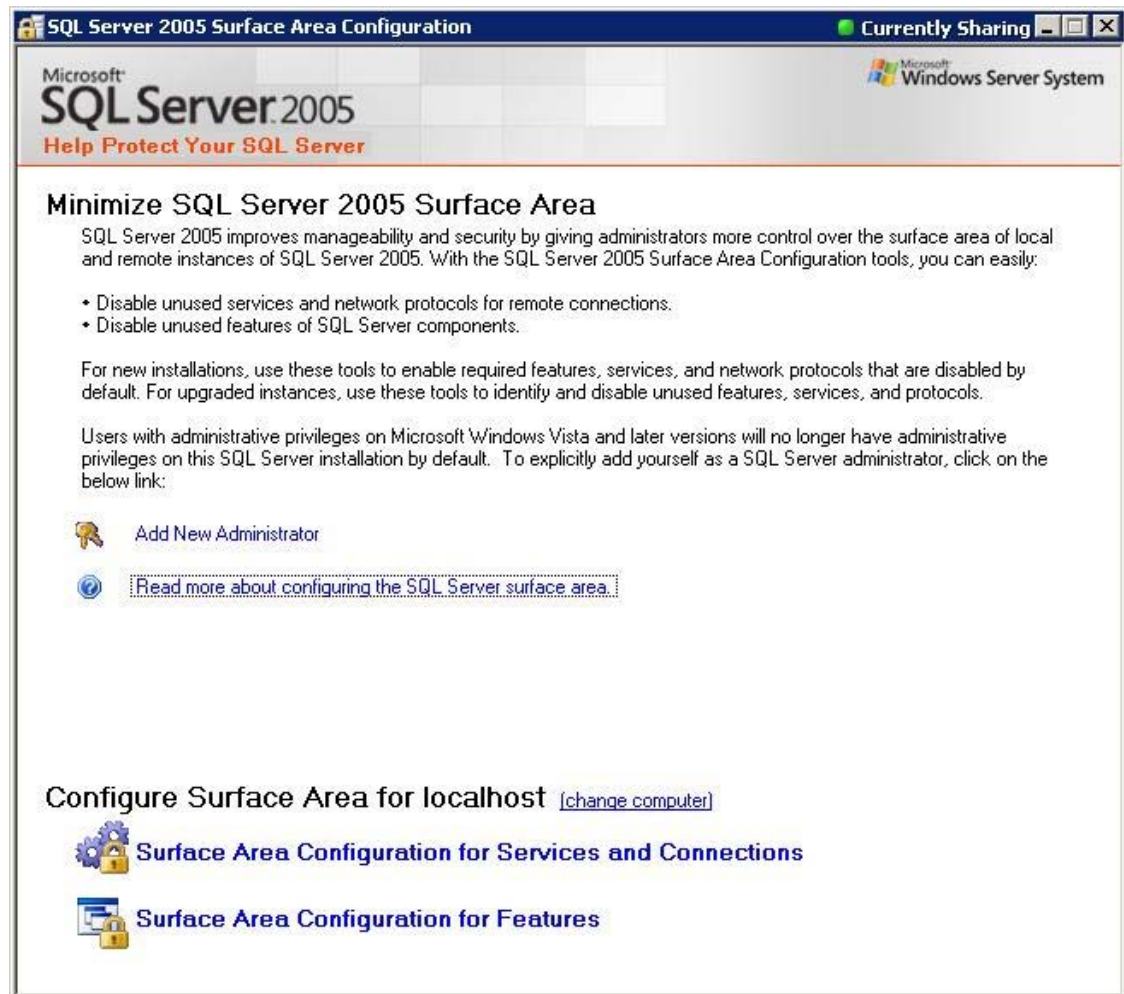
[Configuring SQL Server for CaseMap Server](#)

Configuring SQL Server for CaseMap templates

If you want to create CaseMap SQL cases from existing CaseMap SQL templates, you need to configure SQL Server in order for this to work successfully.

☐ **To configure SQL Server 2005 for CaseMap templates**

1. Open **Microsoft SQL Server 2005**.
2. Click **Configuration Tools**.
3. Click **SQL Server Surface Area Configuration**.
4. In the **SQL Server 2005 Surface Area Configuration** dialog box, click **Surface Area Configuration for Features**.



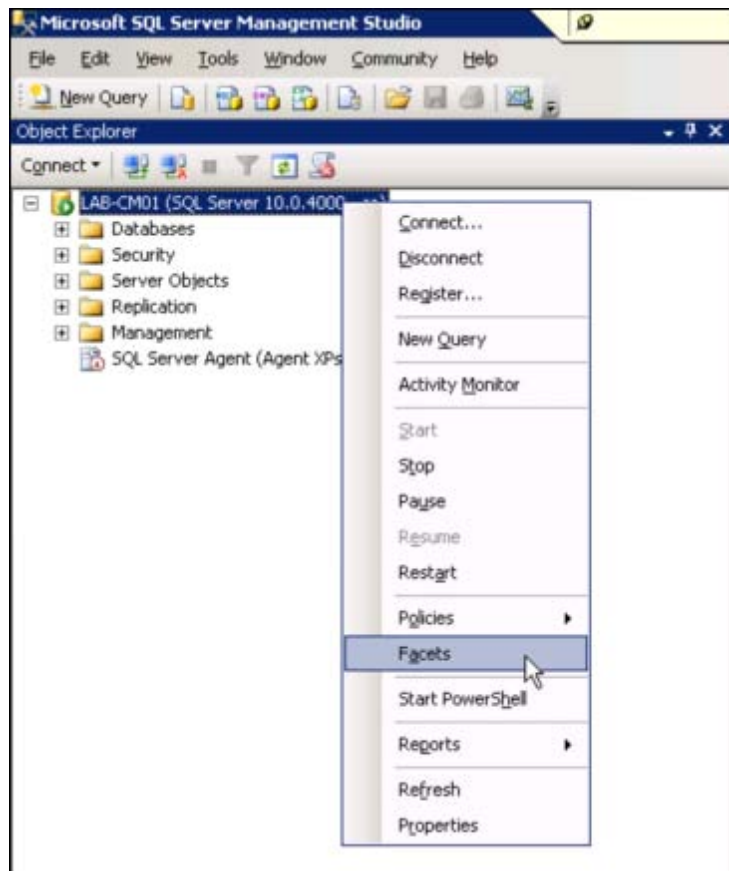
5. In the **Surface Area Configuration for Features** dialog box, click to expand **Database engine**.



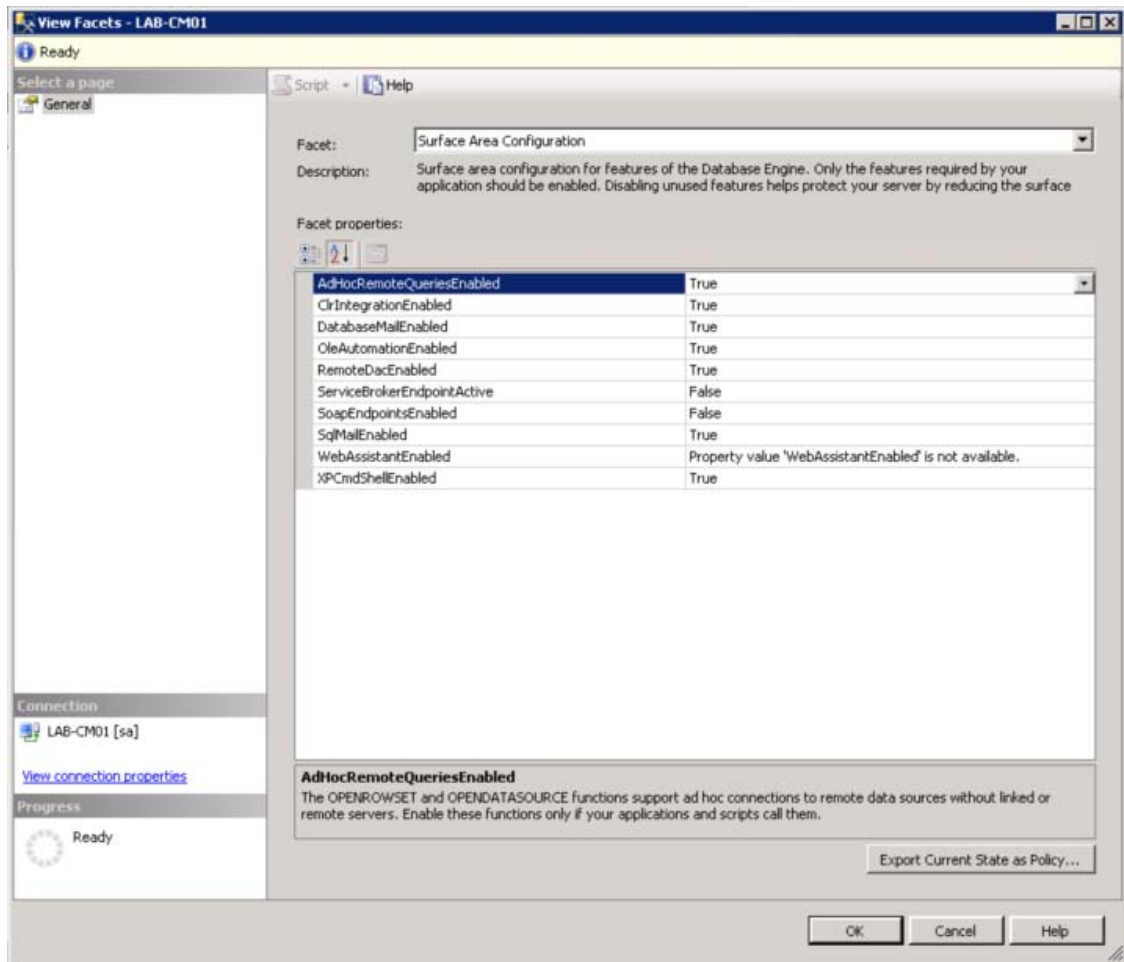
6. Click **Ad Hoc Remote Queries**.
7. Select the **Enable OPENBROWSE and OPENDATASOURCE support** check box, then click **OK**.

[To configure SQL Server 2008 for CaseMap templates](#)

1. Open **Microsoft SQL Server Management Studio 2008**.
2. Logon to **SQL Server Server Management Studio**.
3. In the **Object Explorer** pane, right-click on the server name (root node).



4. Click the **Facets** option.
5. In the **Facet** drop-down listing, click **Surface Area Configuration**.



6. In the **View Facets** box, click in the right column for **AdHocRemoteQueriesEnabled** until it displays **True**.
7. Click **OK**.

Related Topics

[Configuring SQL Server for CaseMap Server](#)

[Creating SQL cases from CaseMap templates](#)

Installing 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 or TextMap 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/TextMap users, then CaseMap Server requires Microsoft Windows service account that has privileges to perform LDAP queries against Active Directory.

To install CaseMap Server

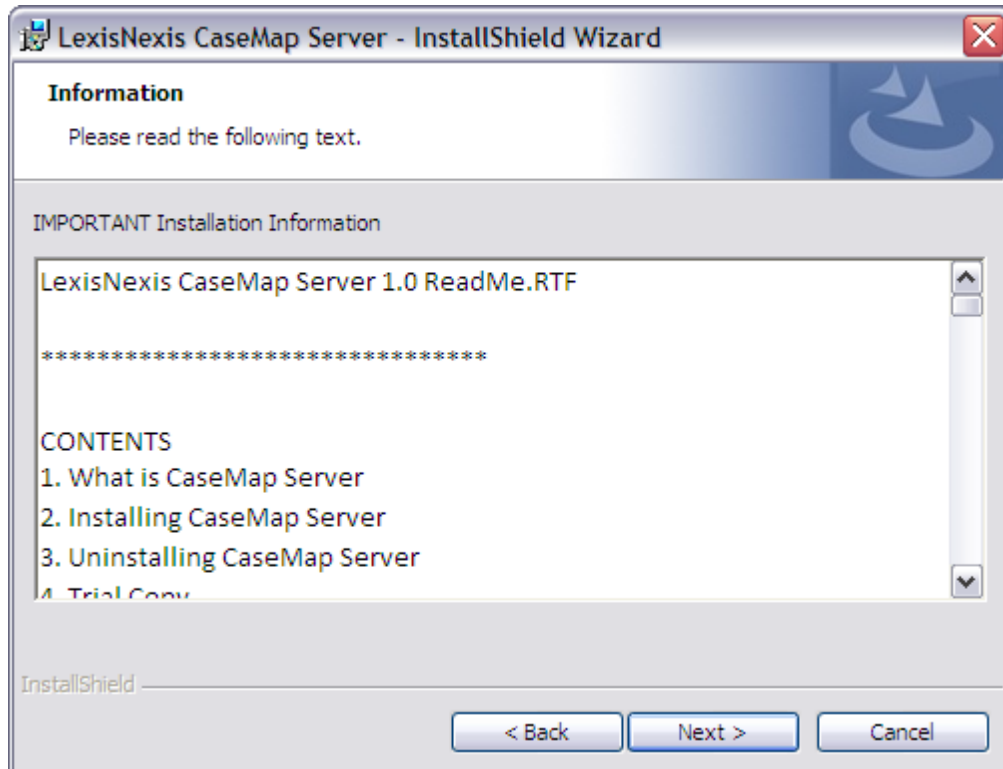
1. Click on the **CMServerSetup.exe** file to launch the CaseMap Server install utility.
2. When the utility launches, click **Next**.



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.



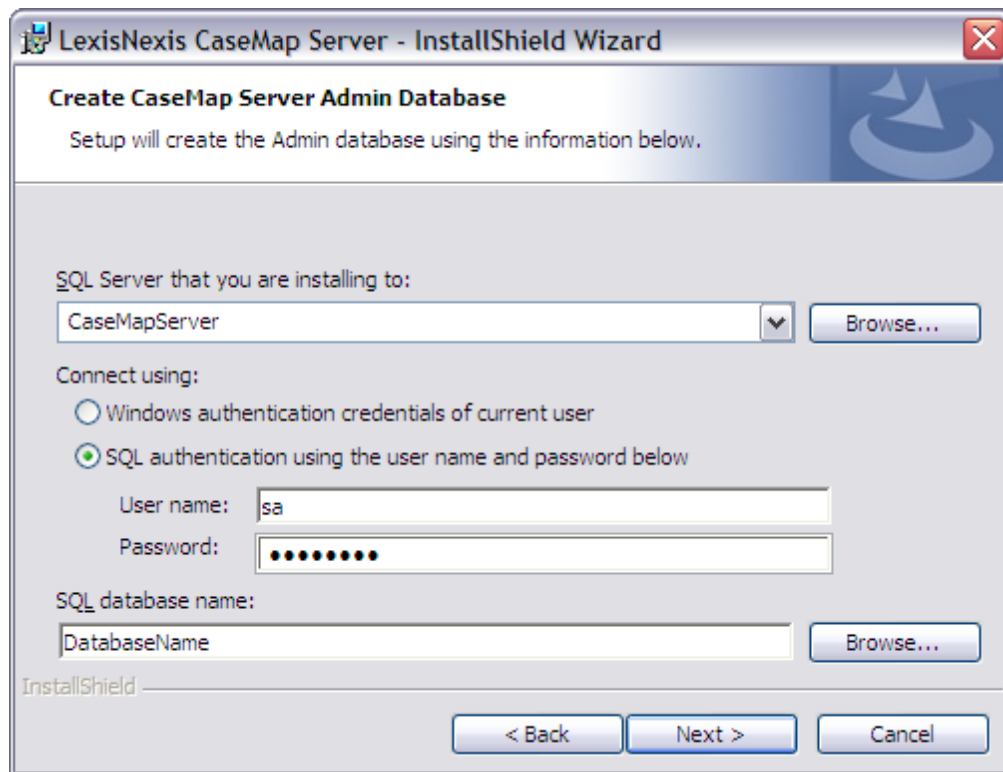
7. Click **Next** to open the **Service Account Information** dialog box.



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.

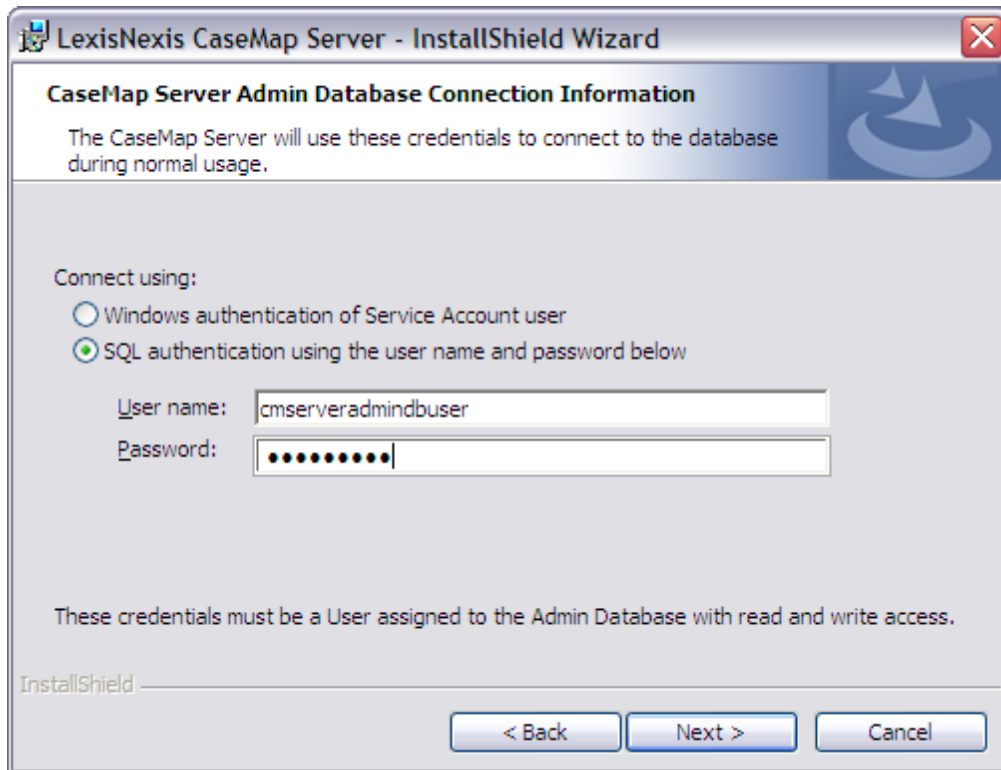
We recommend that you set the service account password to never expire.

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



11. In the **SQL Server that you are install to** field, type in the server name.
12. In the **Connect using** area, select the authentication type you 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.

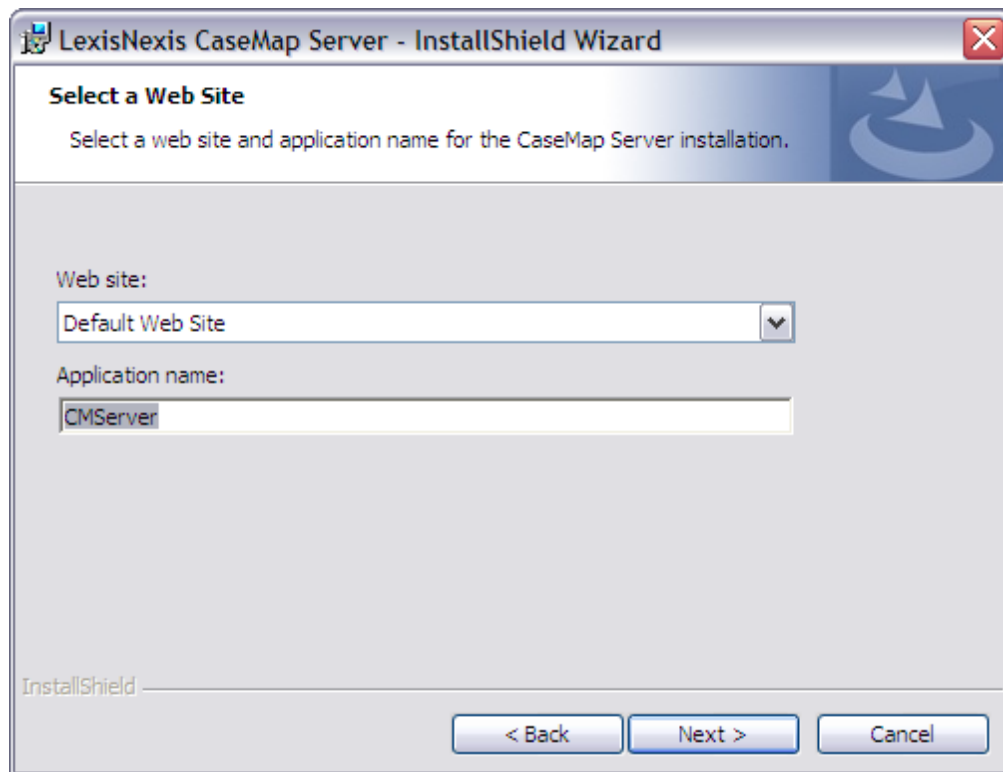


15. In the **Connect using** area, select the authentication type you want to use: Windows or SQL.

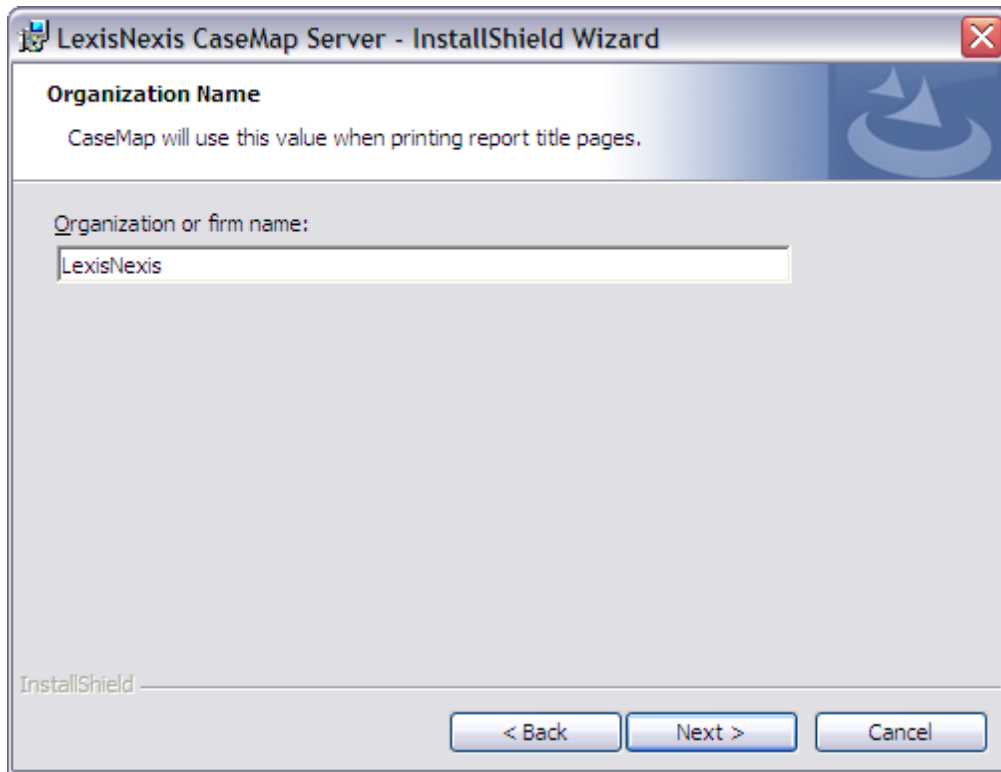
If you are using SQL Authentication, type in a user name and password.

Refer to Step 7 in [Configuring SQL for CaseMap Server](#).

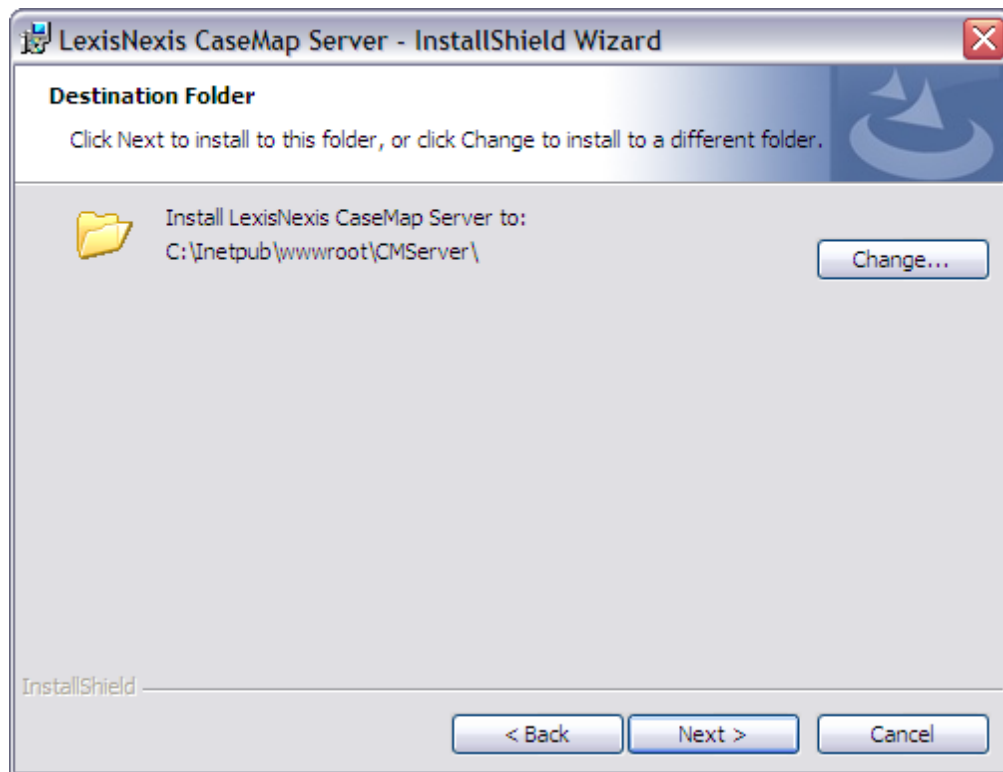
16. Click **Next** to open the **Select the web site** dialog box.



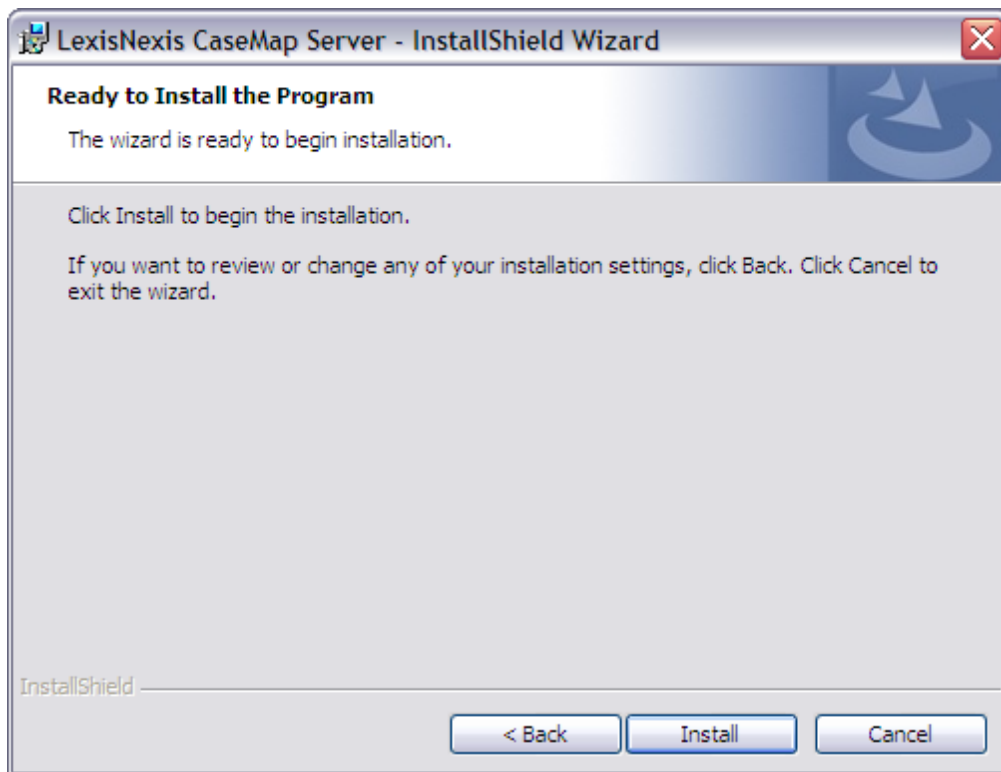
17. In the **Web site** field, type in the Web site you want to use.
18. In the **Application name** field, type in the server name.
19. Click **Next** to open the **Organization Name** dialog box.



20. In the **Organization or firm name** field, type in the organization or firm name.
21. Click **Next** to continue.
22. In the **Destination Folder** dialog box, click **Next** to install to this folder or click **Change** to locate another directory folder.

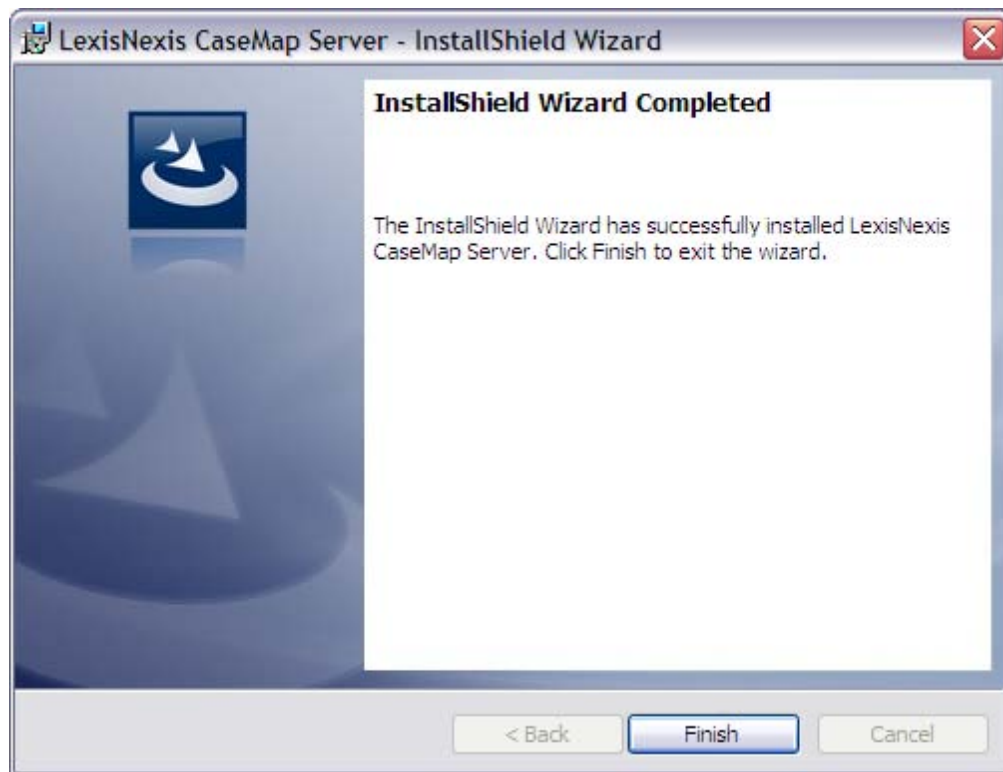


23. Click to **Next** to continue.
24. In the **Ready to Install the Program** dialog box, click **Install**.



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

[About CaseMap Server](#)

System requirements for CaseMap

System requirements for TextMap

[Configuring SQL for CaseMap Server](#)

[Installing CaseMap Admin Console](#)

Automating the client connection with the CaseMap Server

Using command line parameters, you can automate the log on process for CaseMap and TextMap when using Windows Authentication. The command line setup can also be used in conjunction with the option to open SQL cases. See [Opening SQL cases from the command line](#).

When the automatic logon option is specified, the client applications will display a Connect to CaseMap Server dialog box. If the logon succeeds, an attempt is made to open a SQL case if the "SQLCaseName" and "SQLCaseID" parameters are specified, otherwise a Browse for SQL

Cases dialog box displays for the user to select which assigned case to open.

If the user's CaseMap or TextMap client application is not in SQL mode or if there are no registered CaseMap Servers, the user will not be able to connect.

If there is more than one registered CaseMap Server, then an attempt is made to use the last used server. If there is no last used server, an attempt is made to use the first server listed in alphabetical order.

To enter command line parameters

The following command line parameters facilitate Windows authentication for log on to the CaseMap Server.

CaseMap

```
"[PATH]\CaseMap.exe" /AutoLogOn
```

To use this parameter in conjunction with the "SQLCaseName" or "SQLCaseID" parameters, use the following:

```
"[PATH]\CaseMap.exe" /SQLCaseName "[SQL_CASE_NAME]" /AutoLogOn
```

```
"[PATH]\CaseMap.exe" /SQLCaseID "[SQL_CASE_ID]" /AutoLogOn
```

TextMap

```
"[PATH]\TextMap.exe" /AutoLogOn
```

To use this parameter in conjunction with the "SQLCaseName" or "SQLCaseID" parameters, use the following:

```
"[PATH]\TextMap.exe" /SQLCaseName "[SQL_CASE_NAME]" /AutoLogOn
```

```
"[PATH]\TextMap.exe" /SQLCaseID "[SQL_CASE_ID]" /AutoLogOn
```

Related Topics

[Opening SQL cases from the command line](#)

Opening SQL cases from the command line

The CaseMap Server allows you to open CaseMap and TextMap SQL cases via command line support. You must first have case portal web pages set up where you can post hyperlinks to the SQL cases, in addition to any local cases or exported case data you want available such as a case issue list or cast of characters.

Case users can then create shortcuts on their desktops or save hyperlinks as Favorites in their Internet browser to open case file assigned to them. The CaseMap and TextMap applications will launch from the web portal page. You can determine options for whether the client application splash screen displays or whether a user logon is required before the case can be opened.

When a user launches CaseMap or TextMap and passes one of these two command line parameters, the client application will wait for the user to log into the CaseMap Server. After the user logs on to the CaseMap Server, the client application then attempts to automatically open the specified case.

If the user's CaseMap client application is not in SQL mode or the user has not successfully logged into the CaseMap Server, an error message displays to notify them. Does this also apply to TextMap?

- ✍ If a case user is using a trial version of CaseMap or TextMap, and does not have trial time remaining, a message displays to notify them and offers an option to activate the client application.

To open a CaseMap SQL case from the command line

Use the following command line format to open a CaseMap SQL Case Name or SQL Case ID:

```
"[PATH]\CaseMap.exe" /SQLCaseName "[SQL_CASE_NAME]"
```

```
"[PATH]\CaseMap.exe" /SQLCaseID "[SQL_CASE_ID]"
```

CaseMap allows the user to pass a file name as the first parameter on the command line to open the file, e.g. "CaseMap.exe C:\Program Files\Microsoft SQL\Server\MSSQL\DATA\database.mdf". The file path and name must be the first parameter in the command line.

This can also be combined with "-nosplash" and "-nodlg", and the file name must be the first parameter on the command line.

Correct (suppresses the splash screen and opens the case file)

```
"CaseMap.exe C:\Program Files\Microsoft SQL\Server\MSSQL\DATA\database.mdf -nosplash"
```

Incorrect (suppresses the splash screen, but does not open the case file)

```
"CaseMap.exe -nosplash C:\Program Files\Microsoft SQL\Server\MSSQL\DATA\database.mdf"
```

To open a TextMap SQL case from the command line

Use the following command line format to open a TextMap SQL Case Name or SQL Case ID:

```
"[PATH]\TextMap.exe" /SQLCaseName "[SQL_CASE_NAME]"
```

"[PATH]\TextMap.exe" /SQLCaseID "[SQL_CASE_ID]"

Related Topics

[Automating the client connection with the CaseMap Server](#)

Installing the CaseMap Admin Console

Installing 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 and TextMap 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 or TextMap SQL case databases.

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

- CaseMap or TextMap client users who need access to SQL case databases
- CaseMap Admin Console users who can administer case databases and users

The CaseMap Admin Console is the only place you can create new CaseMap or TextMap SQL case databases. Once the case is created, you can assign it to users with local or Active Directory type authentication. Use the CaseMap or TextMap SQL Import Utility to migrate existing 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, review the important installation information, then click **Next**.



6. In the **Default CaseMap Server** dialog box, type in the CaseMap Server in the **Name** field.

LexisNexis CaseMap Admin Console - InstallShield Wizard

Default CaseMap Server

Enter the default CaseMap Server name and URL below. The URL should be a valid CaseMap Server Admin endpoint, e.g. http://SERVER NAME/CMserver/CMserverAdmin.svc

Name: CaseMapServer

URL: http://[ServerName]/CMserver/CMserverAdmin.svc

InstallShield < Back Next > Cancel

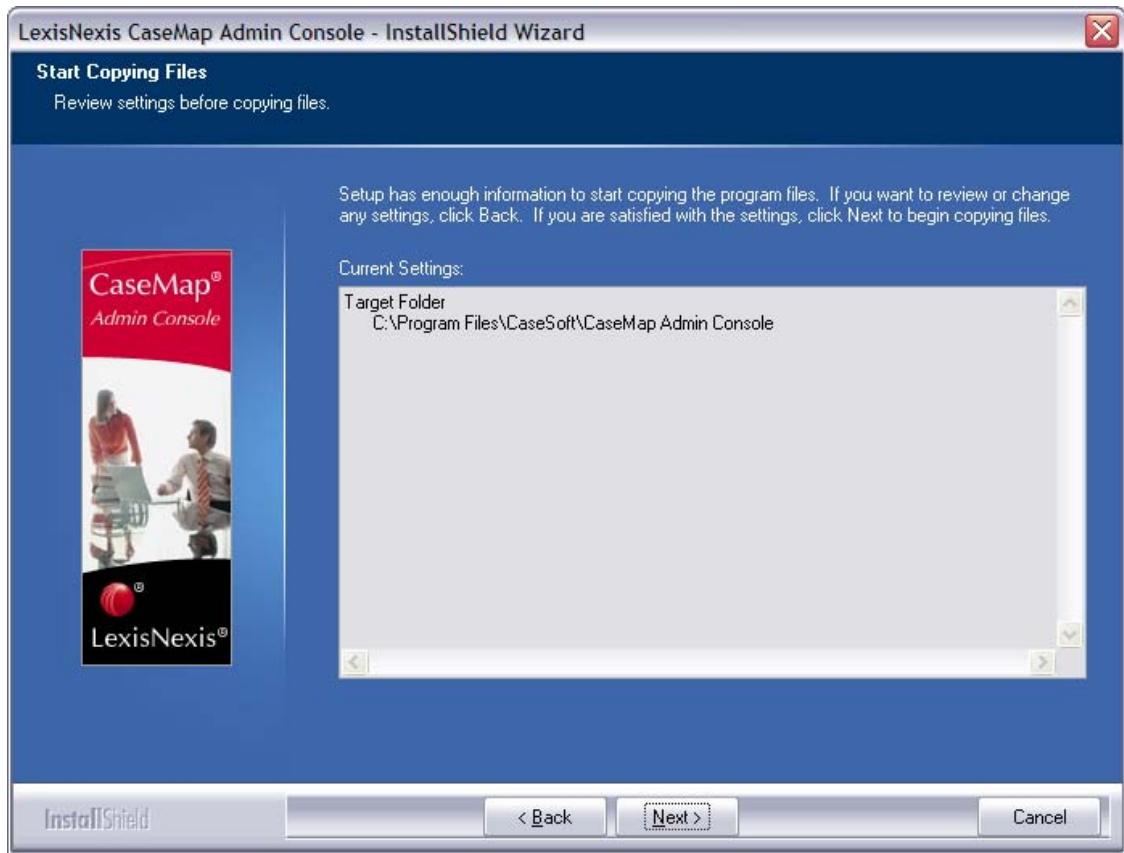
7. In the **URL** field, type in the Server URL, then click **Next**.
8. In the **Choose Destination Location** dialog box, verify whether the default destination folder is the appropriate location.



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**.



If you want to modify any settings, click the Back button.

11. In the **InstallShield Wizard Complete** dialog box, select the **Launch the CaseMap SQL Admin Console** check box.

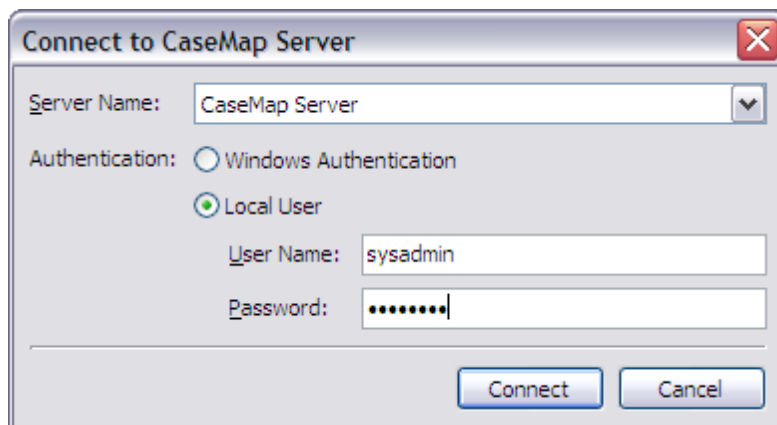
Select the View the ReadMe File check box if you want to review the file.



12. Click **Finish**.

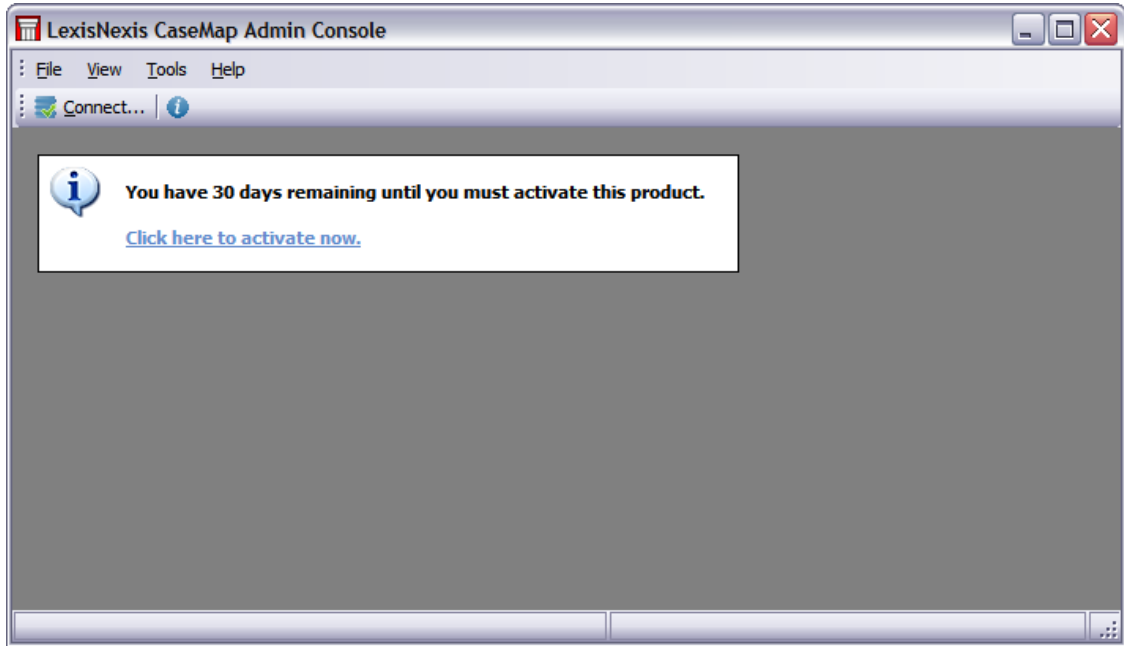
The CaseMap Admin Console automatically launches and is ready for you to register a CaseMap Server.

13. In the **Connect to CaseMap Server** dialog box, select **Local User**.

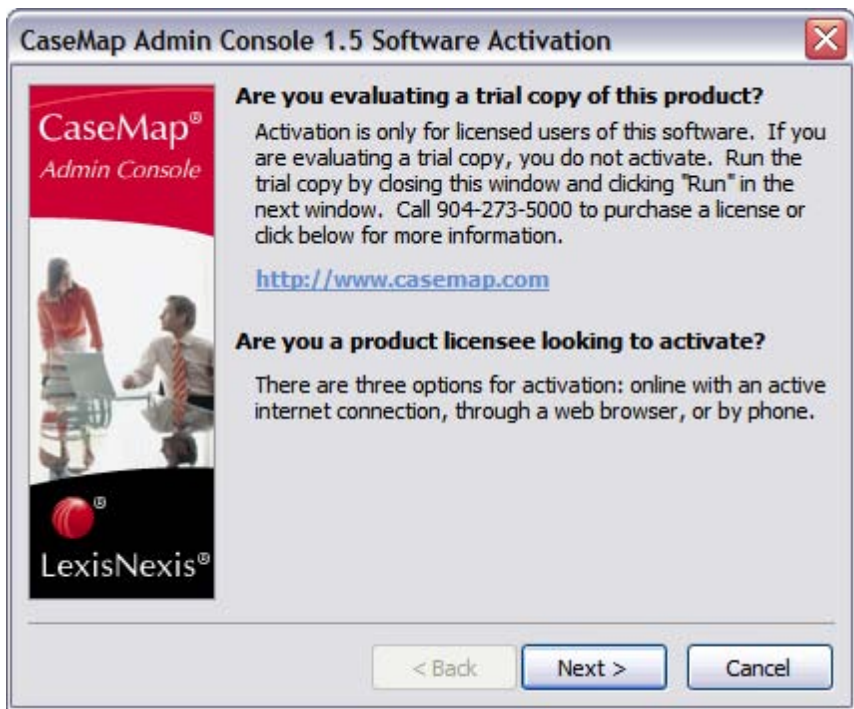


14. In the **User Name** field, type *sysadmin*.
15. In the **Password** field, type in *password*.

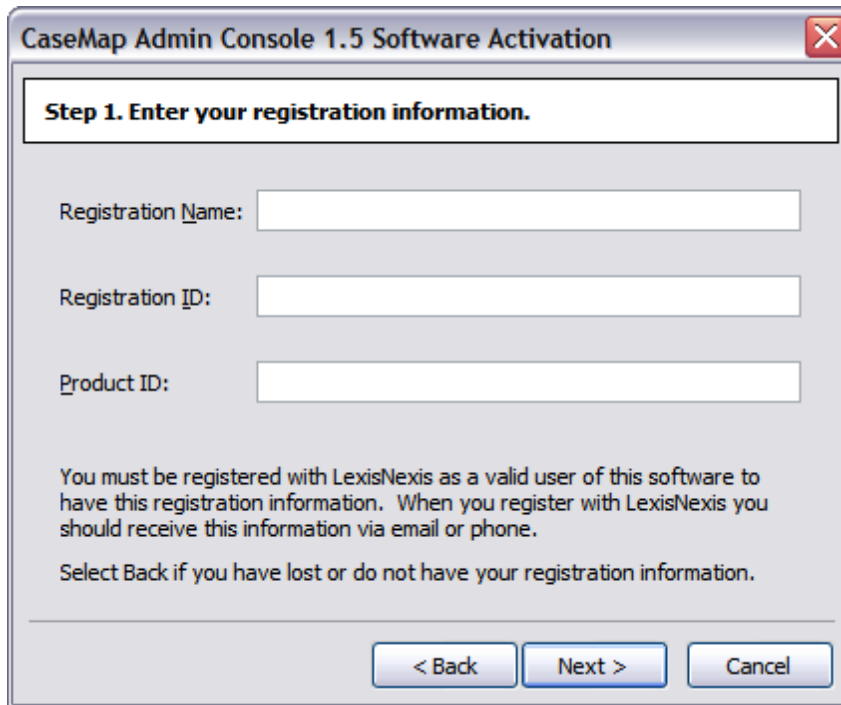
- 16. Click **Connect** to continue.
- 17. In the **CaseMap Admin Console**, click the **Click here to activate now** hyperlink.



- 18. In the **CaseMap Admin Console Software Activation** dialog box, click **Next** to open the **Enter your registration information** dialog box.

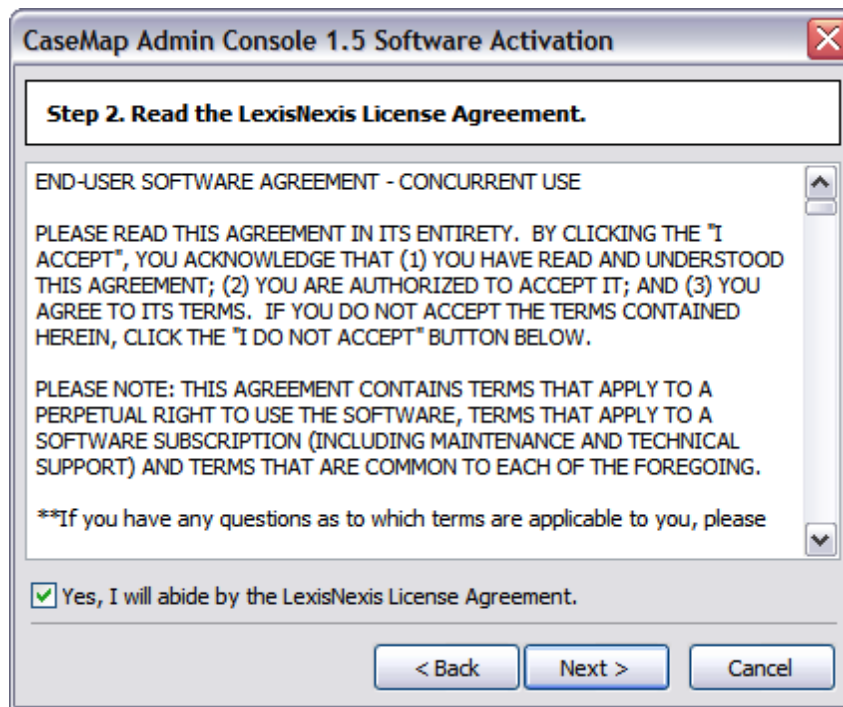


- 19. In the **Registration Name** field, type in your user name for license registration.

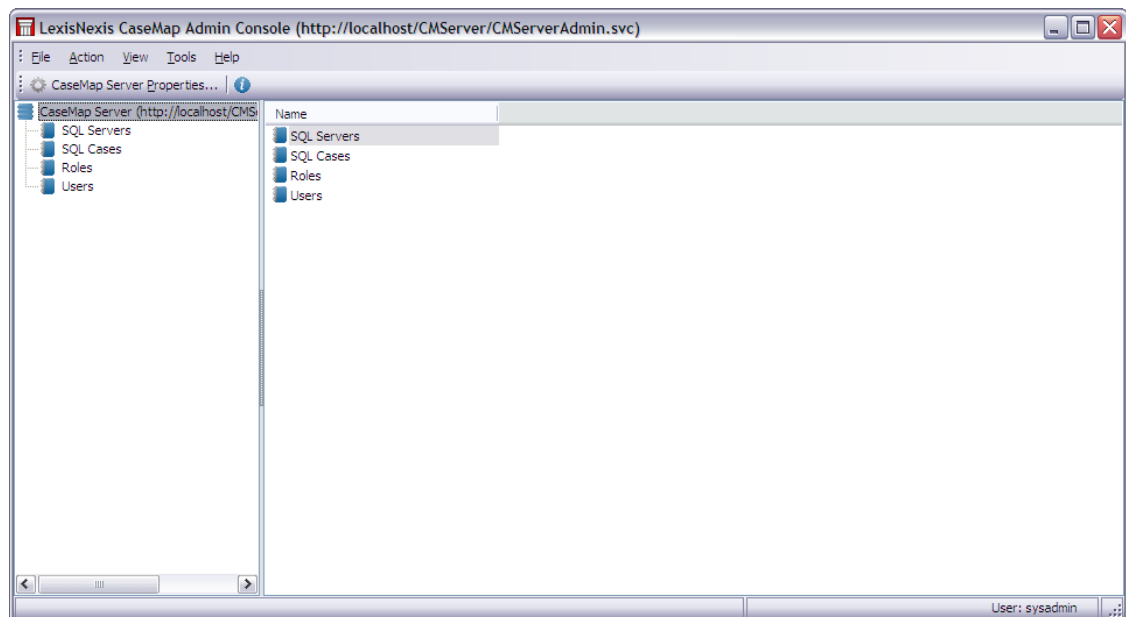


The image shows a dialog box titled "CaseMap Admin Console 1.5 Software Activation". It contains a header "Step 1. Enter your registration information." followed by three text input fields: "Registration Name:", "Registration ID:", and "Product ID:". Below the fields is a paragraph of text: "You must 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." and a line "Select Back if you have lost or do not have your registration information." At the bottom are three buttons: "< Back", "Next >", and "Cancel".

20. In the **Registration ID** field, type in your registration ID.
21. In the **Product ID** field, type in the TextMap license number.
22. Click **Next** to continue.
23. In the **Read the LexisNexis License Agreement** dialog box, read the license agreement and then select the **Yes, I will abide by the LexisNexis License Agreement** check box.



24. Click **Next** to continue.
25. In the **How do you want to activate this product** dialog box, select the activation option you want to use.
 - Activate software online - Use this option to activate online with an active internet connection.
 - Activate by web browser or phone - Use this option if you received an activation key via email.
26. Click **Next** to continue.
27. In the **Summary of online activation transmission information** dialog box, review the license registration information.
28. Click **Finish** to complete the activation.
29. In the message box confirming CaseMap Admin Console activation, click **OK**.
30. In the **CaseMap Admin Console**, click the **Connect** button.



31. In the **Connect to CaseMap Server** dialog box, select **Local User**.
32. In the **User Name** field, type *sysadmin*.
33. In the **Password** field, type in *password*.
34. Click **Connect** to continue.

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

You can now install the CaseMap or TextMap SQL Import Utility programs, if you plan on migrating existing local case files to the CaseMap Server.

Related Topics

[About CaseMap Server](#)

System requirements for CaseMap

System requirements for TextMap

[Installing CaseMap Server](#)

[Installing the CaseMap SQL Import Utility](#)

[Installing the TextMap SQL Import Utility](#)

Installing the CaseMap SQL Import Utility

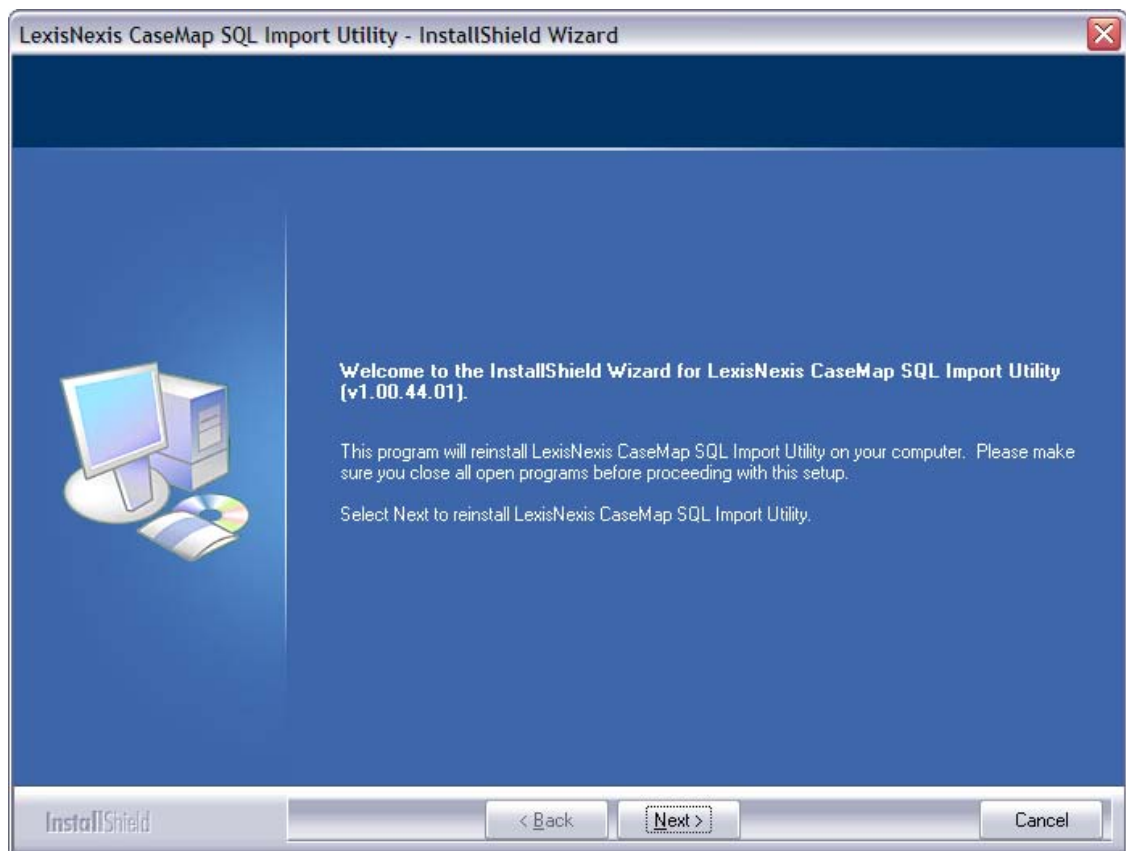
Installing the CaseMap SQL Import Utility

The CaseMap SQL Import Utility is designed to help you migrate pre-existing case files to CaseMap Server. This utility converts case files created in CaseMap v9.0 (or earlier) that are in an Access database format and creates new SQL case files in a SQL Server database format. Each CaseMap case requires a distinct SQL Server 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 is migrated to CaseMap Server, it can no longer be accessed in previous versions of CaseMap.

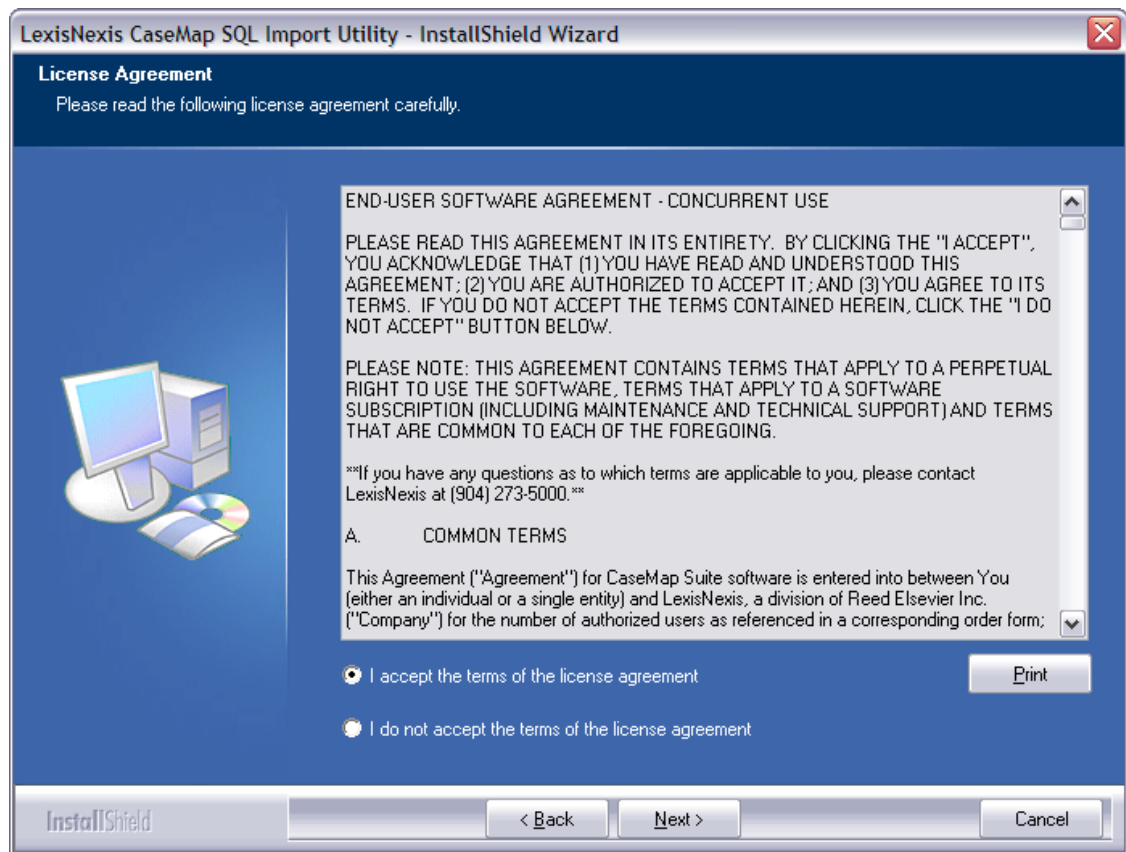
How to install the CaseMap SQL Import Utility

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

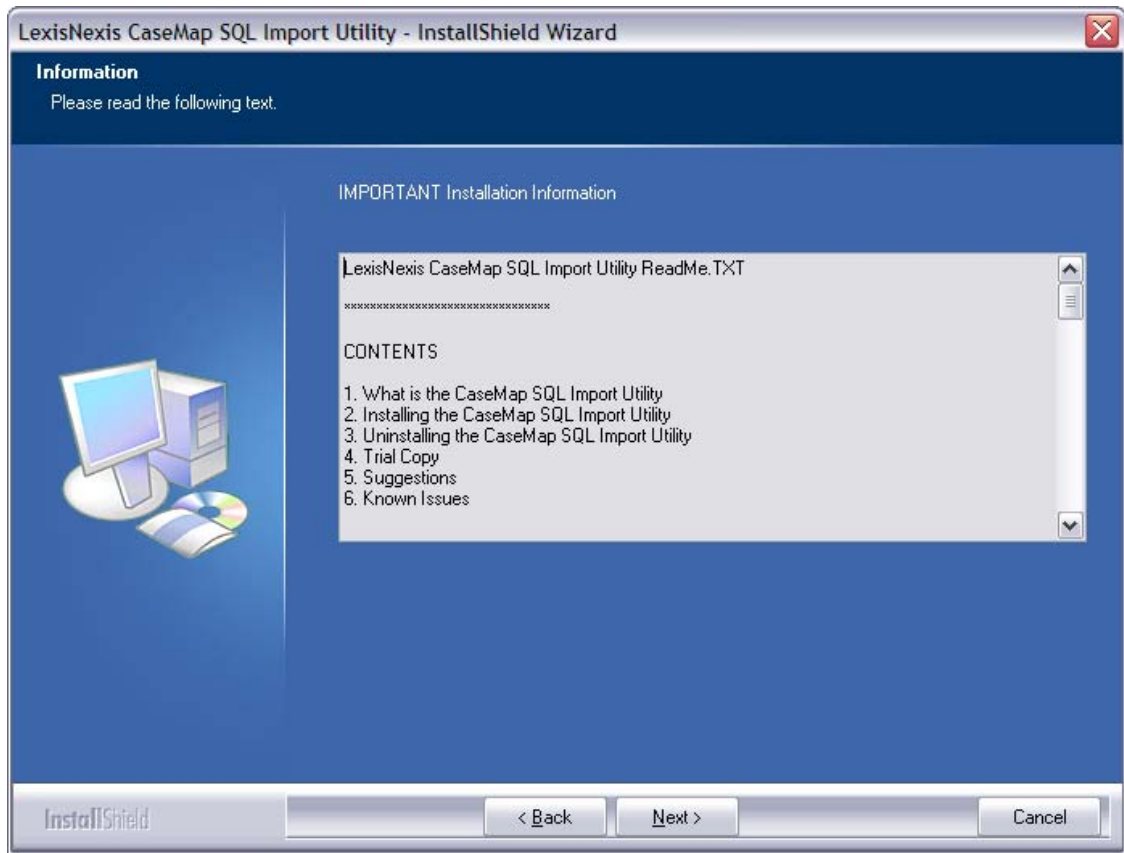


3. In the **License Agreement** dialog box, review the license agreement and then select **I accept the terms of the license agreement**.

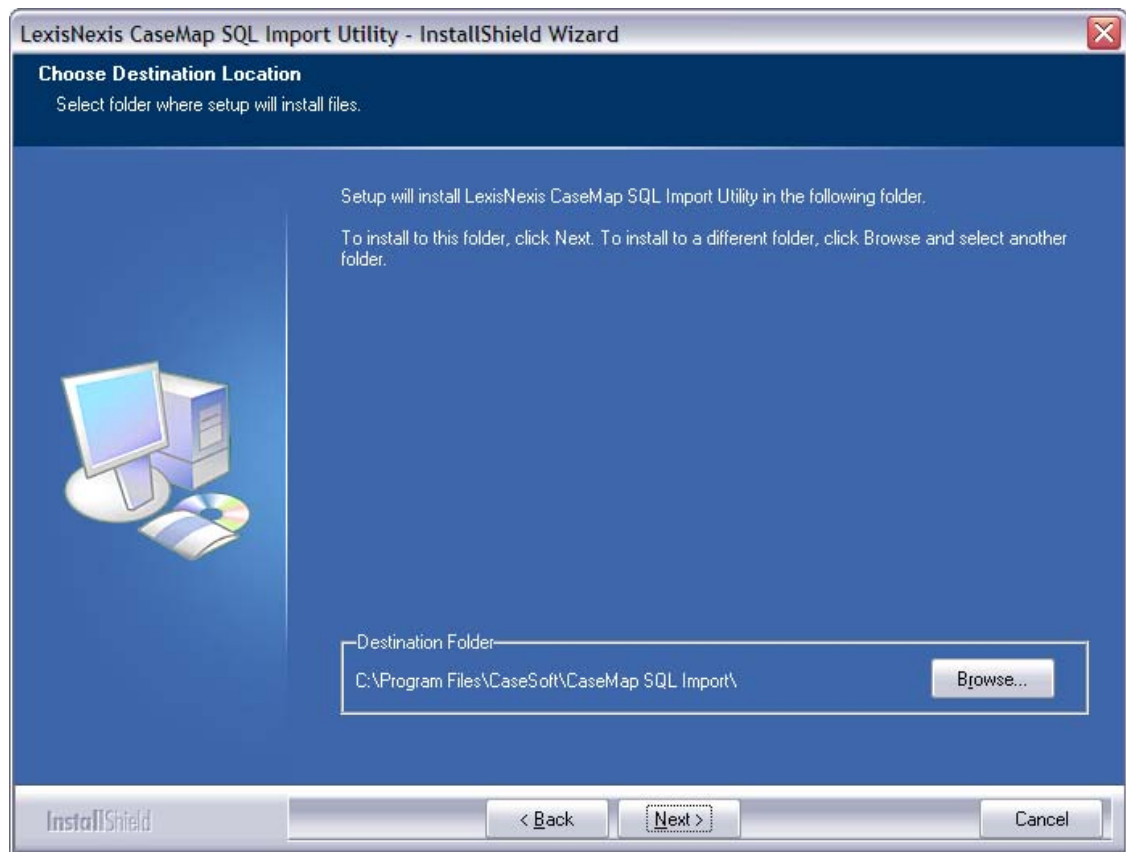
If you would like to print a copy of the license agreement at this time, click the Print button.



4. Click **Next** to continue.
5. In the **Information** dialog box, review installation information, then click **Next**.



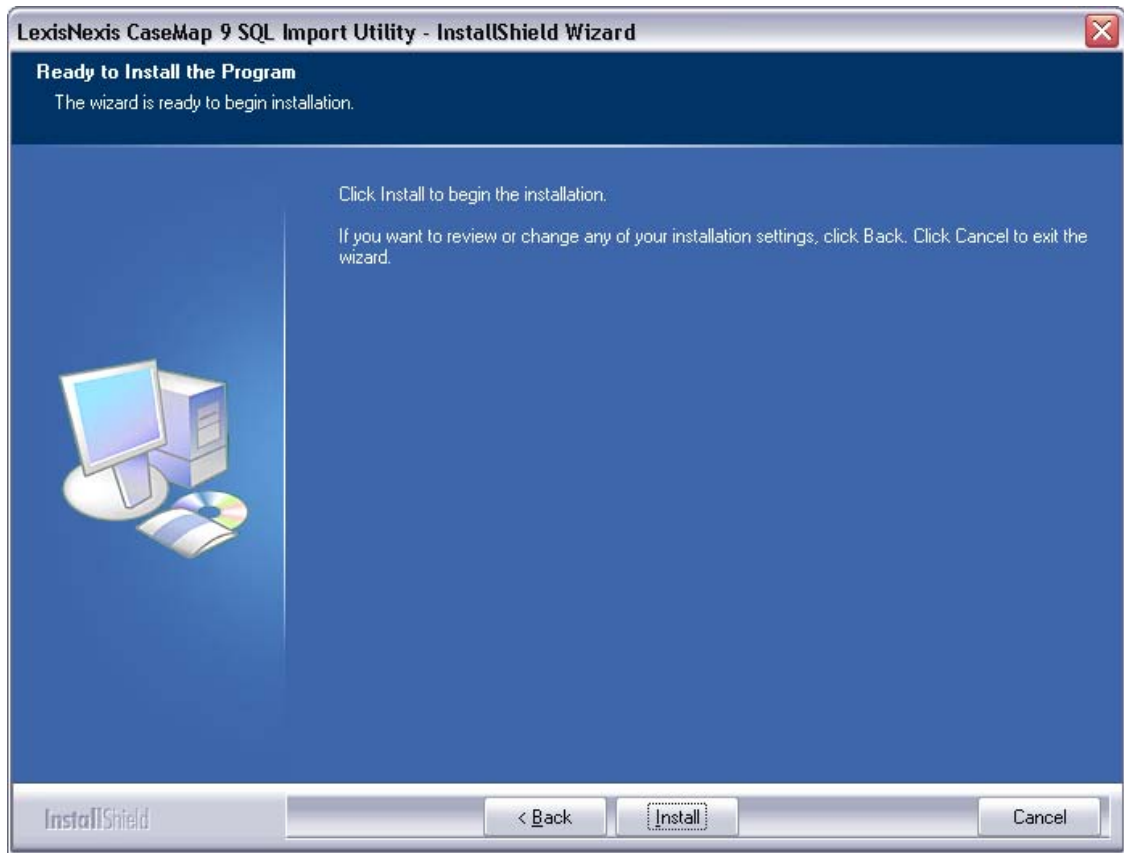
6. In the **Choose Destination Location** dialog box, verify whether the default destination folder is the appropriate location.



The default folder is C:\Program Files\CaseSoft\CaseMap SQL Import\.

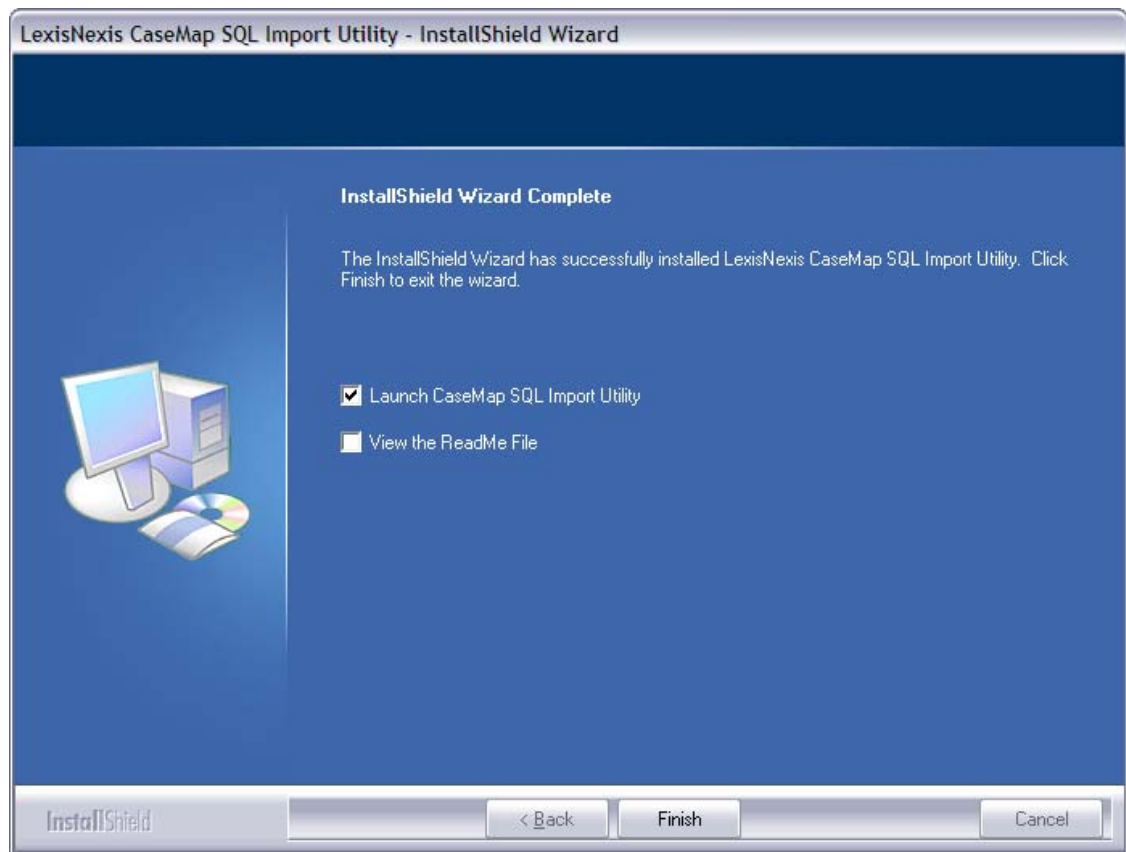
Click the Browse button to change the destination folder and choose a different folder.

7. Click **Next** to continue.
8. In the **Start Copying Files** dialog box, review the current install settings, then click **Next**.

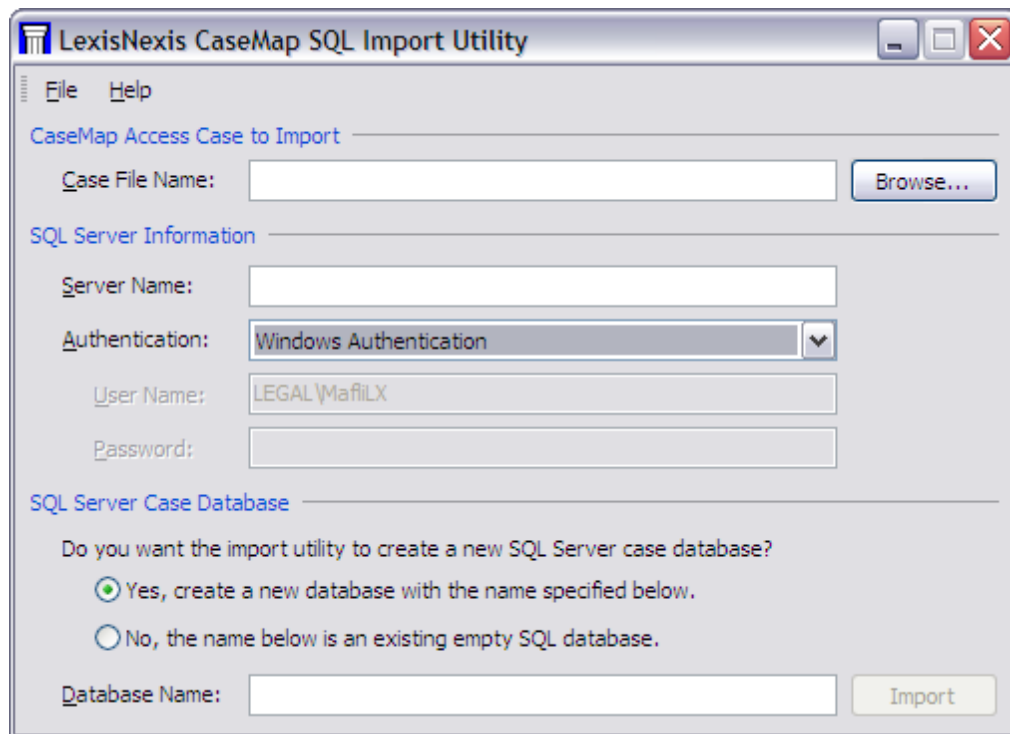


If you want to modify any settings, click the Back button.

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.



When you are ready to migrate existing case files to the CaseMap Server, the LexisNexis CaseMap SQL Import Utility dialog box displays.

Related Topics

[About CaseMap Server](#)

System requirements

[Installing CaseMap Server](#)

[About migrating case files](#)

[Migrating case files to CaseMap Server](#)

Registering existing case files

Mapping case users

Installing the TextMap SQL Import Utility

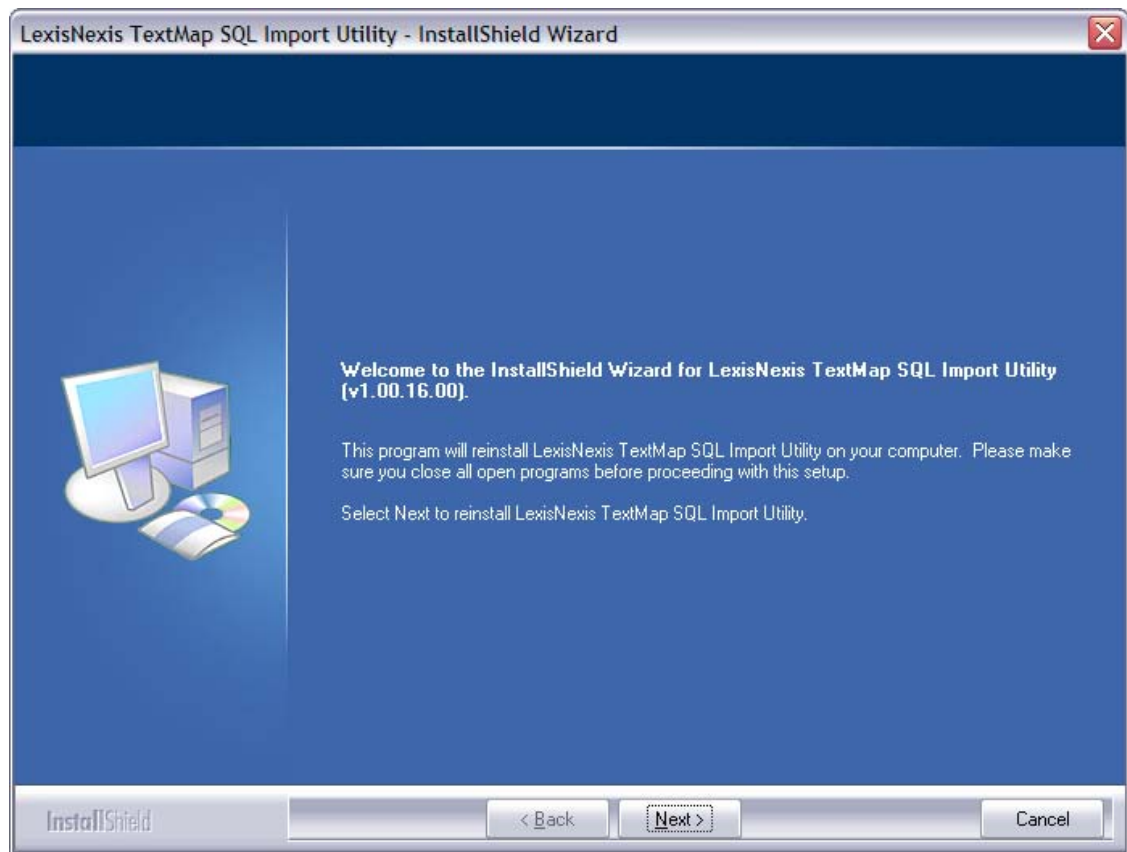
Installing the TextMap SQL Import Utility

The TextMap SQL Import Utility is designed to help you migrate pre-existing case files to CaseMap Server. This utility converts cases created in TextMap v5.5 (or earlier) that are in an Access database format and creates new SQL cases in a SQL Server database format. Each TextMap case requires a distinct SQL Server database.

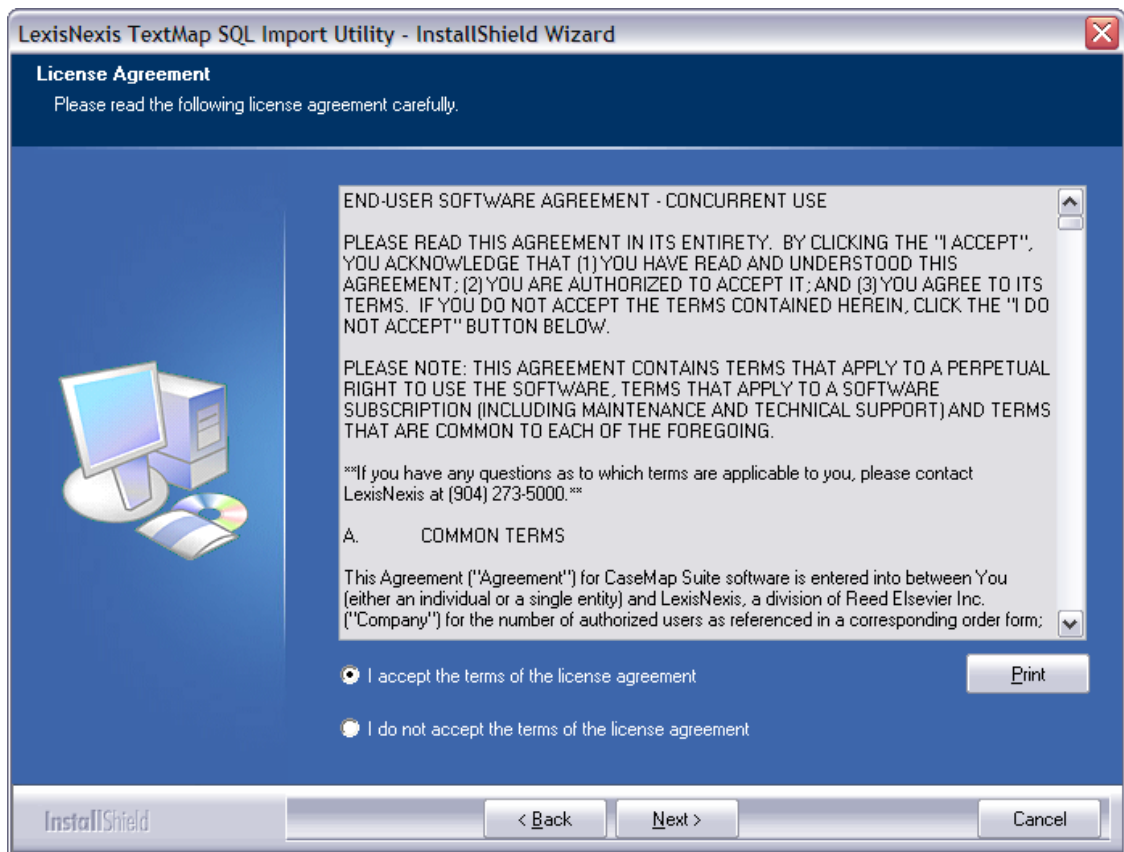
After you import an Access case into a SQL Server database, use the CaseMap Admin Console to register the case database and then assign it to users. Once a case is migrated to CaseMap Server, it can no longer be accessed in previous versions of TextMap.

To install the TextMap SQL Import Utility

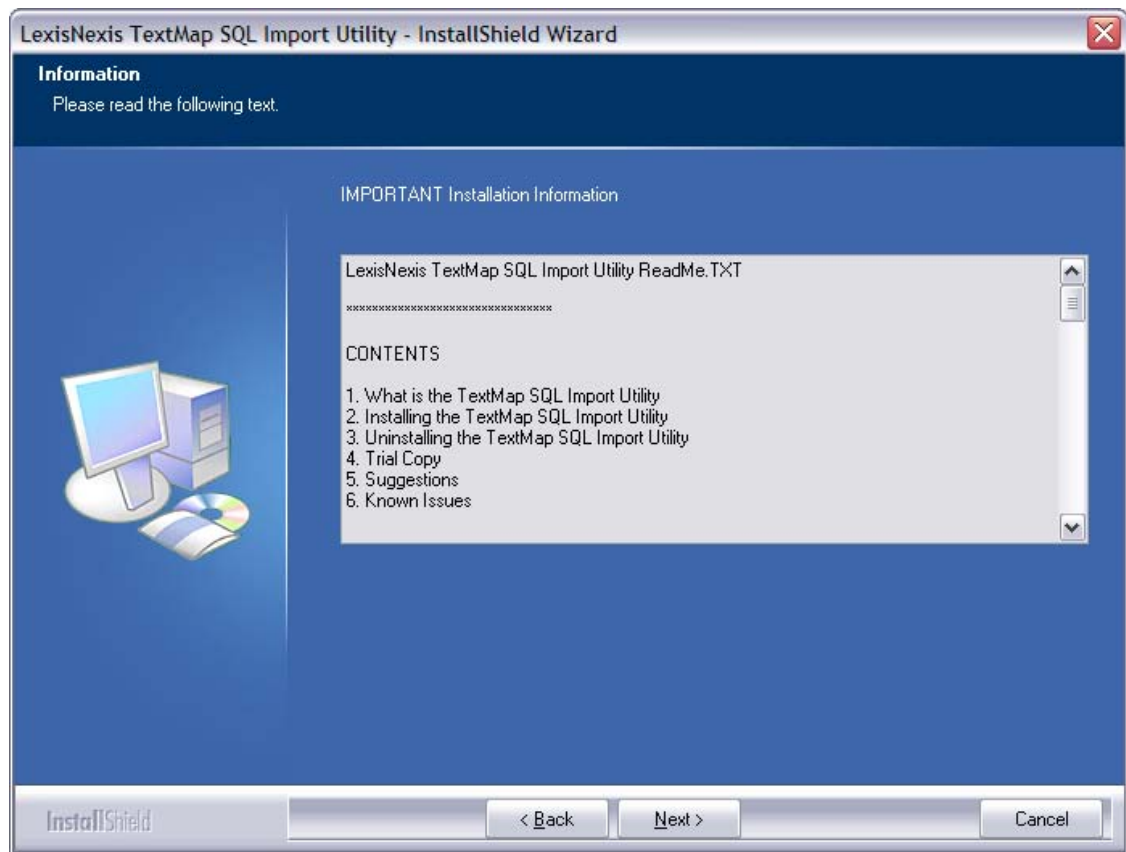
1. Click on the **XMSQLImportSetup.exe** file to launch the TextMap SQL Import Utility.
2. When the import wizard launches, click **Next**.



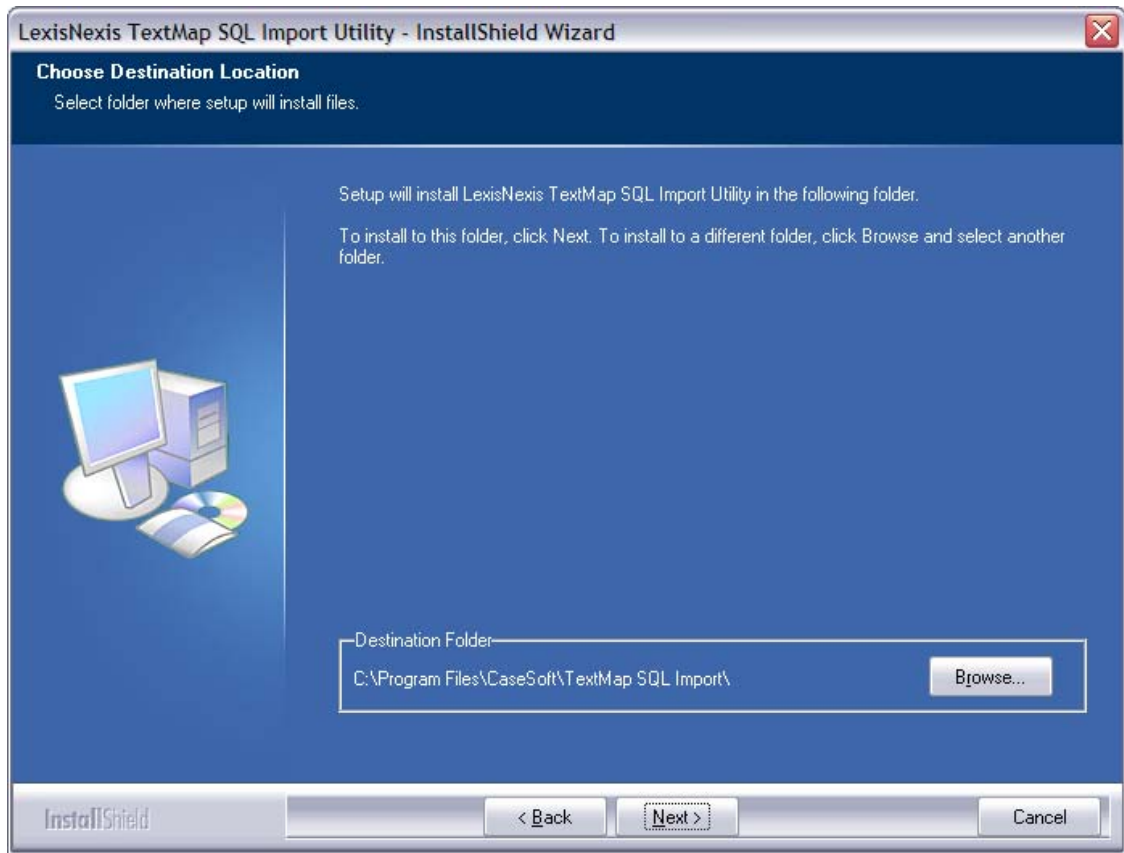
3. In the **License Agreement** dialog box, review the license agreement and select **I accept the terms of the license agreement**.
4. Click the **Print** button to print a copy of the license agreement.



5. Click **Next** to continue.
6. In the **Information** dialog box, review installation information, then click **Next**.

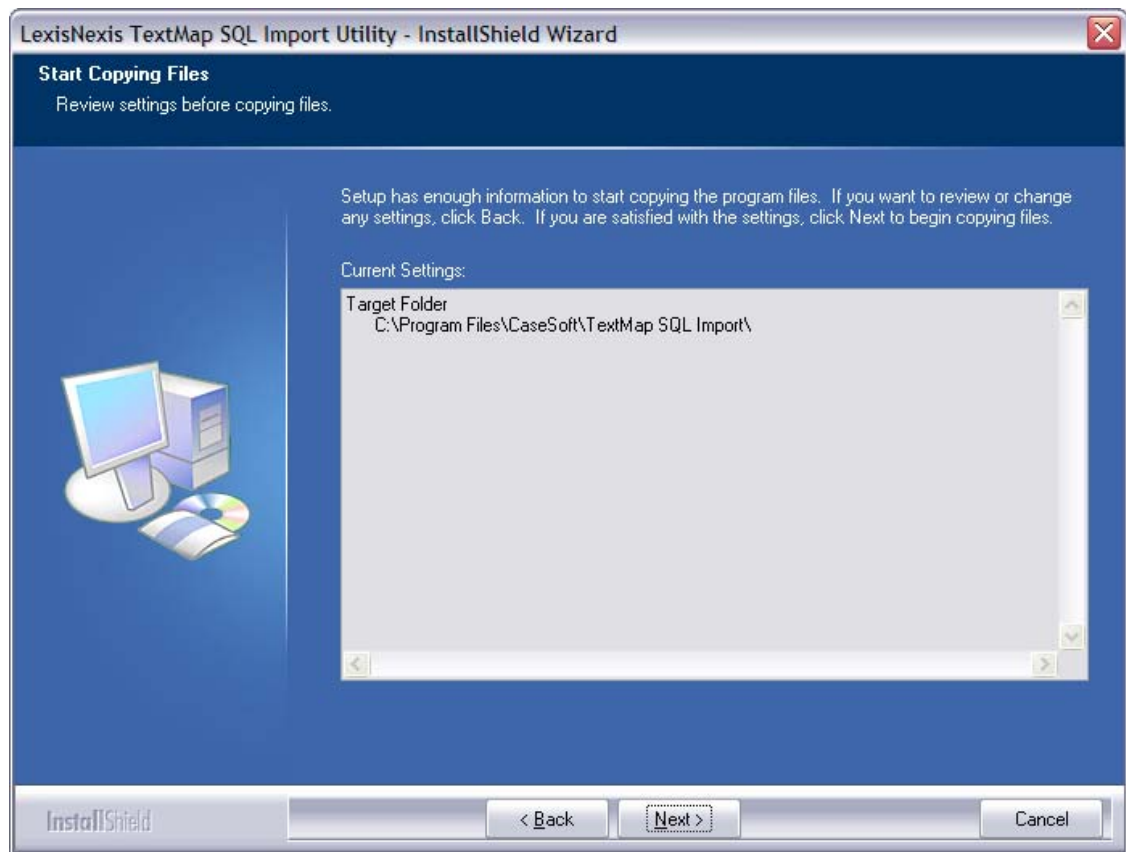


7. In the **Choose Destination Location** dialog box, verify whether the default destination folder is the appropriate location.



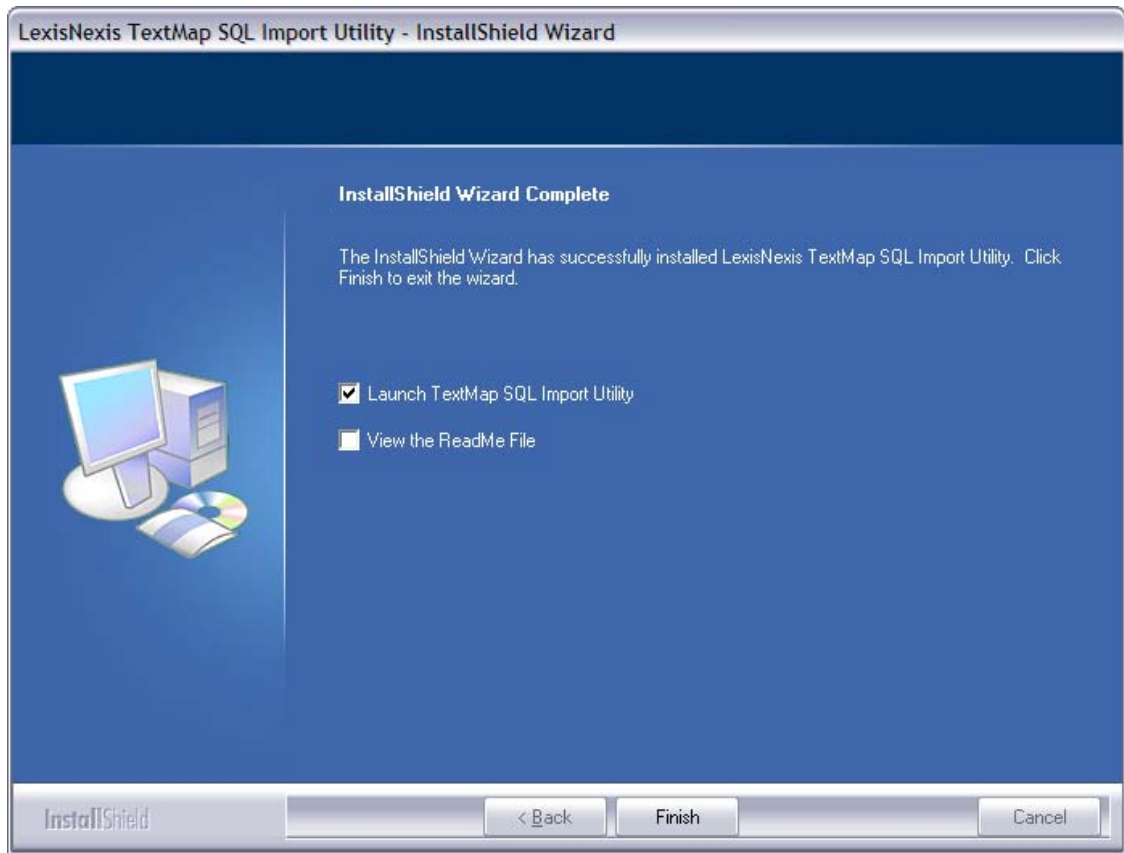
The default folder is C:\Program Files\CaseSoft\TextMap SQL Import\

8. 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**.



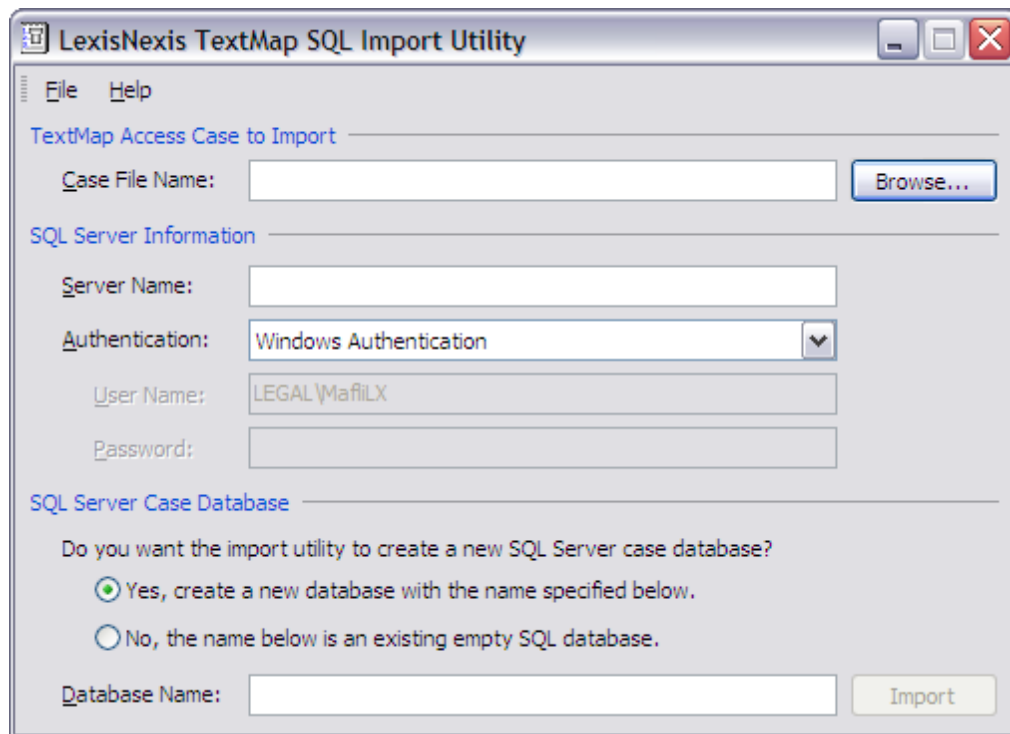
If you want to modify any settings, click the Back button.

11. In the **Installshield Wizard Complete** dialog box, verify that the **Launch TextMap SQL Import Utility** check box is selected.



Select the View the ReadMe File check box if you want to view the file at this time.

12. Click **Finish** to continue.
13. When the **TextMap SQL Import Utility** launches, click **Close** at this time.



When you are ready to migrate existing case files to the CaseMap Server, the LexisNexis TextMap SQL Import Utility dialog box displays.

Related Topics

[About CaseMap Server](#)

System requirements for CaseMap

System requirements for TextMap

[Installing CaseMap Server](#)

[About migrating case files](#)

Registering existing case files


Mapping case users

Migrating Case Files to CaseMap Server

About migrating cases

Previous versions of CaseMap and TextMap cases are written to Microsoft® Access databases. CaseMap v9.0 and TextMap v6.0 also retain 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 SQL case databases managed in Microsoft SQL Server.

Migrating an existing case to CaseMap Server is two-step process. First you import the existing case using the CaseMap or TextMap SQL Import Utility. Next you register the imported SQL case 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 SQL cases. This process allows you to map users from the CaseMap or TextMap 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 SQL case and able to open it in the client application. For more information, see Mapping case users.

 Always backup copies of the local cases before you migrate them into CaseMap Server.

[Learn the key steps for successful case migration](#)

Review the following for best practices in migrating case 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 Server 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, TextMap, and CaseMap Server / CaseMap 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 and TextMap case 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 local 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 v9.0 and TextMap v6.0 SQL options have been tested against Microsoft SQL Server 2005 and 2008.

Related Topics

[Installing the SQL Import Utility](#)

[Migrating case files to CaseMap Server](#)

Registering an existing case file

Mapping case users


Converting case files in CaseMap


Converting case files in TextMap

Migrating cases to CaseMap Server

Use the CaseMap or TextMap SQL Import Utility programs to migrate previous version case files to the CaseMap Server. During the import process, the utility converts a case in an Access database format to a SQL Server database format. It creates a brand new SQL case and copies all information from the old case into the new one. You will also have the option to create the new case on a specified server instead of using an existing one. Each CaseMap or TextMap case 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.

Once a case has been successfully imported to the CaseMap Server, the file extension on the previous version case is changed to ".001" to ensure that case staff can no longer open it in the client application. 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 and TextMap are not used during the conversion process, so you can uninstall them at any time.

 Once a case has been converted to a new version format, users can no longer access it using an older version of CaseMap or TextMap. 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** or **TextMap Access Case to Import** area, click the **Browse** button to locate the case file you want to migrate to CaseMap Server.

LexisNexis CaseMap SQL Import Utility

File Help

CaseMap Access Case to Import

Case File Name: C:\Directory Folder\CaseFileName.cm8 Browse...

SQL Server Information

Server Name: DatabaseServerName

Authentication: SQL Server Authentication

User Name:

Password:

SQL Server Case Database

Do you want the import utility to create a new SQL Server case database?

Yes, create a new database with the name specified below.

No, the name below is an existing empty SQL database.

Database Name: SQLCase Import

LexisNexis TextMap SQL Import Utility

File Help

TextMap Access Case to Import

Case File Name: C:\Directory Folder\CaseFileName.txmap Browse...

SQL Server Information

Server Name: DatabaseServerName

Authentication: SQL Server Authentication

User Name:

Password:

SQL Server Case Database

Do you want the import utility to create a new SQL Server case database?

Yes, create a new database with the name specified below.

No, the name below is an existing empty SQL database.

Database Name: SQLCase Import

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.

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

[Installing the SQL Import Utility](#)

[About migrating case files](#)

Registering existing case files

Mapping case users

Testing installation

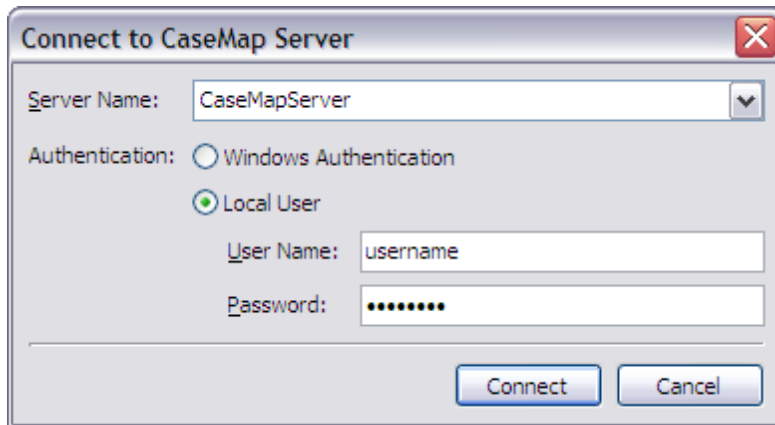
CaseMap and TextMap need to be installed before you can open the SQL case in either application.

Testing installation involves:

- Opening the CaseMap Admin Console and connecting to the CaseMap Server
- Opening a SQL case in the CaseMap or TextMap client

To test connectivity in 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**.

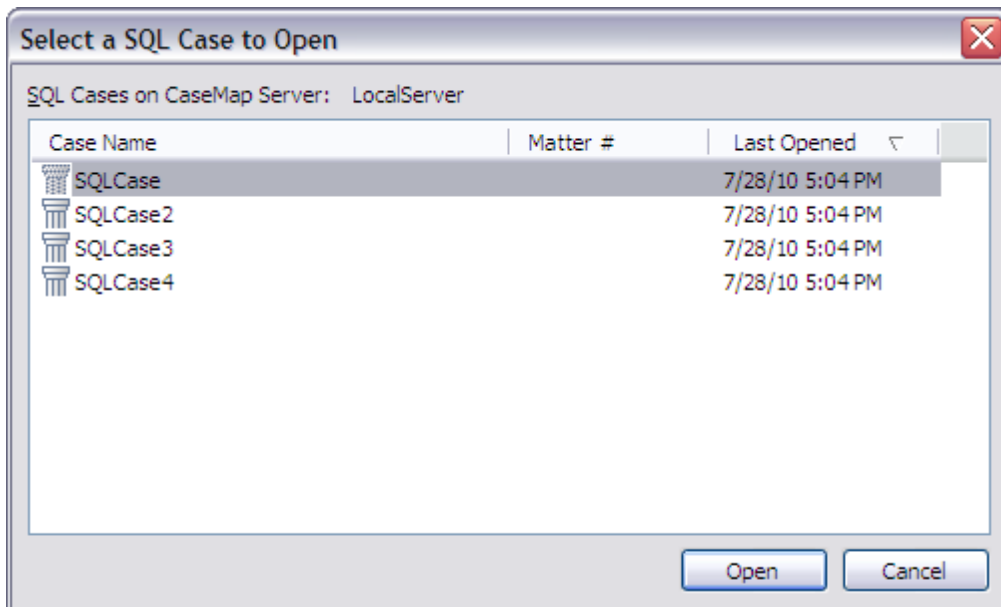
If you select Local User, type in the User Name and Password.

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 either **CaseMap** or **TextMap**.
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 application's title bar.
 - **CaseMap** - If you can view case records in spreadsheets and open an attached file, the installation was successful.
 - **TextMap** - If you can view transcripts and open an attached file, the installation was successful.

Related Topics

[Verifying connectivity](#)

Verifying 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.

[To verify connectivity](#)

Checklist: Connectivity	
	Task
Servers	
<input type="checkbox"/>	Is CaseMap Server installed?
<input type="checkbox"/>	Is the CaseMap Administration Console installed?
<input type="checkbox"/>	Did you remember to set up an admin database and a valid system administrator account in SQL Management Studio first?
Case Files	
<input type="checkbox"/>	Did you register your cases in the CaseMap Administration Console?
<input type="checkbox"/>	Did you associate your cases to SQL Servers so that CaseMap/TextMap can access it?
<input type="checkbox"/>	Have you implemented the necessary Web server address restrictions?
Users	
<input type="checkbox"/>	Have you set up and enabled user accounts in the CaseMap Admin Console?

Checklist: Connectivity

	Task
<input type="checkbox"/>	Does each user have a valid user ID and password, and does it match for Active Directory?
<input type="checkbox"/>	Have you assigned user accounts to roles and SQL case files?
<input type="checkbox"/>	Do you have a CaseMap/TextMap license for each user who need to access case files?
<input type="checkbox"/>	Have you installed CaseMap/TextMap locally for each user?

Related Topics

[Testing installation](#)